

JOB DESCRIPTION – CASE MANAGEMENT ASSISTANT

Position:	Case Management Assistant
Reporting To:	HF Management Team / Business Strategy Manager
Job Summary:	To provide administrative assistance to the Case Management service and the Head First Team, as required.

Key Working Relationships

- Maintain good working relationships with all members of the Head First team.
- Maintain a constructive and progressive relationship with Head First's clients, their families and support workers.
- Keep other team members informed of any information which is relevant to their team (e.g. medico-legal, wages, finance, HR, health and safety) using the agreed channels of communication.
- Liaison with external parties, e.g. therapists, support workers, solicitors etc.
- Support incoming calls and queries from clients, client families, support workers and any other relevant stakeholders, and assist where appropriate.

1. Key Tasks

To provide administrative assistance to the Case Management service and Head First Team, as required.

(i) Telephone

- Answer incoming telephone calls and direct as appropriate via the rota-based system, providing additional support to cover CMA team absence.
- When taking telephone messages, ensure that sufficient and accurate information (as well as date, time and number) is taken from the caller and passed on to the relevant person.

- Screen unwanted messages, e.g. sales calls.
 - If there is an urgent message, ensure that it reaches the person concerned.
 - Adhere to the policy and procedures as set out in the Head First Staff Handbook.
 - Ensure on-call system is allocated to the appropriate Case Manager and implemented via BT Cloud.

(ii) Rota Management

- Setting up of 'ideal' client rota on our Rota Management system and amending where necessary.
- Amending clocking ins/outs and shift lengths.
- Approve holidays.
- Source support worker cover.

(iii) Alchemer

- Create new or amend existing Support Worker Records via the Alchemer system in accordance with Case Manager input and guidance.
- Run reports as and when required
- Download Support Worker Records for disclosure to litigation teams as and when required
- Make notes of any malfunctioning records via the appropriate log.

2 Case Management-Specific Tasks

- Ensure that all documents are completed accurately and according to our standard administration procedures using standard layouts and checking spelling, grammar and content where appropriate.
- Ensure that any correspondence, reports etc. are uploaded and saved prior to sending.
- Send e-mails as required and according to our standard administration procedure.

- Undertake the formatting of reports, clinical documents, etc., ensuring latest copy is uploaded to the correct storage area
- Arrange the booking of meetings via Zoom and admitting the Case Manager at the relevant time.
- Attend and minute meetings as required; prepare accurate minutes and distribute in a timely manner

3 Client-Specific Tasks

- Source (where applicable) and arrange purchase of equipment or other goods in liaison with Case Manager, internal and external parties, adhering to Head First's purchase order procedure.
- Research and book holidays for clients, their families and attending support staff. Liaise with Financial deputies where appropriate.
- Assist in all aspects of domestic organisation such as sourcing and booking cleaners, tradespersons, etc. to, as far as possible, facilitate clients' independent living.

4 **Maintain the filing systems for the Case Management service, in liaison with the Case Management Team Coordinator**

- Ensure that Case Management filing is kept up to date following our standard filing procedures in liaison with other administrative staff, both hard copy or electronic filing.
- Create new files as requested and ensure that all relevant information including contact names and addresses, are placed ready in the file.
- Maintain archiving systems and keep up to date records of the same.
- Be prepared to assist other teams as required.

5 **Assist in the maintenance of the computerised clinical file note system.**

- Maintain the computerised clinical file note system on a daily basis by means of inputting all billable notes.

- Download, format and prepare for disclosure case management file notes, by billable period, for relevant clients.
- 6 Be responsible for working with Case Managers to coordinate their diaries and appointments, arranging travel and accommodation as necessary.**
- Work in liaison with Case Managers and the Finance Team to book travel tickets, accommodation and parking as requested.
 - Attend regular (at least monthly) meetings with your designated Case Managers to discuss their requirements and action any requests resulting from these meetings.
- 7 Be responsible for working with Case Managers and Human Resources to coordinate Support Worker recruitment.**
- Work in liaison with Case Managers and the Human Resources team to coordinate all administrative aspects of Support Worker recruitment, to include recruitment advertising, management of incoming CV's and interview arrangements and liaison with the relevant person regarding recruitment funding.
 - Facilitate the training of new Support Workers in the use of SharePoint and Alchemer, and any other applications they may need to access.
- 8 Provide cover for other members of the CMA team as required.**
- Be prepared and flexible in your approach to help out during busy periods in other areas as required, e.g. holiday and sickness cover.
- 9 Adhere to the administration procedures as set out in the Head First Handbook.**
- Ensure that our standard administration procedures are adhered to and help to establish new ones as necessary.
 - Undertake any copying and scanning of documents, as required.

- 10 Maintain client confidentiality, security of the premises, and be responsible for the accuracy of own recordings.
- The last person on the daily phone rota is to ensure that the telephone system is diverted to the relevant Case Manager on call and the office shut down procedure has been carried out.
 - At all times, respect the need for confidentiality when possessing knowledge of a private and personal nature about clients, their families and carers.
 - Record any work undertaken according to our standard note-writing procedure, using the recognised format.
 - Complete client contact forms, accurately recording time spent in direct contact for each case, as necessary.

Other Information:

- All employees of Head First must commit to Equal Opportunities and Anti-Discriminatory Practice.
- Head First operates a Smoke-Free Policy and the post-holder is prohibited from smoking in any of Head First's premises or other enclosed spaces.
- The post-holder is expected to familiarise themselves with and adhere to all relevant Head First Policies and Procedures.
- The post-holder must comply with Head First's Health and Safety requirements.
- The post-holder must be eligible to live and work in the UK.