Case management in Care Act Advocacy

Training Aid 3

Guidance for Care Act Advocacy cases

This guidance is designed to support advocates in managing Care Act cases efficiently and effectively, with an emphasis on timely engagement, clear expectations, and proactive case management. By following these steps, advocates ensure that cases progress smoothly and that advocacy support is provided effectively to individuals who need it.

Case duration and expected timelines

- Care Act cases should ideally be completed **within two months or less**. This helps maintain a steady flow of cases, allowing advocates to deliver high-quality, impactful support and ensures that new referrals can be triaged and allocated promptly.
- For safeguarding cases, longer timeframes may be necessary due to their complexity. However, advocates and managers should work together to keep these cases progressing in a structured and timely way.

Initial process upon case allocation

1. **Contact with referrer**:
    - Advocates need to reach out to the referrer within **one business day** of the case being allocated, either by email or phone. During this initial contact, please confirm the purpose of the Care Act process (e.g., needs assessment, review, or safeguarding investigation) and establish the expected timeline.
    - Work with the referrer to agree on a specific date for the Care Act process. It's important to have this date confirmed before contacting the person, as it will help shape the focus and goals of your advocacy. If any issues come up during this stage—such as finding out the case is no longer with the assigned social worker, or the referrer is unable to proceed due to other commitments—please discuss with your manager. Together, you can decide whether the case should stay with you or go back to triage for Central Support Team (CST) oversight.
2. **Contact with the person**:
    - Advocates should wait to contact the person until a date has been confirmed with the referrer. This step ensures advocates have accurate information to share, allowing for clear discussions about the specific goals and support the advocate will provide.
    - When making first contact with the person, advocates should confirm which part of the Care Act process they will be supporting and help identify the person's goals (e.g., attending their needs assessment, expressing concerns about their care plan, etc.).

Delays in scheduling the Care Act process

If the Care Act process cannot be scheduled within four weeks of case allocation:

- **Discuss with manager**: The advocate should inform their manager about the situation, explain any challenges, and discuss potential next steps.
- **Case return to triage**: If a timely solution isn't possible, the manager may decide to return the case to triage. This helps keep the case actively managed and avoids prolonged delays for the person involved. The manager will send the standard email to the referrer, notifying them that the case has been returned to triage and advising them to reach out to the Central Support Team (CST) for updates.

Addressing challenges in safeguarding and other complex scenarios

1. **Clarifying the stage of safeguarding cases**:
    - If the safeguarding case stage is unclear (e.g., unallocated, or no meeting is scheduled), the advocate must escalate this with their manager. Advocates should not proceed without a clear understanding of the safeguarding process and any associated timeline.
    - If any challenges are identified, the advocate and manager may work together to escalate these to appropriate local authority team leads or managers, helping to move the case forward.
2. **Engagement with managers for extended cases**:
    - Any **Care Act case open for longer than six months** will prompt the manager to contact the responsible team's manager to establish a clear timeline for conclusion. This ensures progress and maintains a steady flow of cases through the service.
3. **Proactive safeguarding management**:
    - For safeguarding cases that seem to have no clear end date, managers will initiate contact with the lead safeguarding professional, requesting updates on the case stage, upcoming meetings, and an anticipated timeline.
    - Advocates are encouraged to seek this information directly in their ongoing work. Proactive engagement, as recommended by NICE guidelines, supports effective advocacy, particularly in safeguarding cases where people may experience increased restrictions, risk, or uncertainty about outcomes.

Manager support and case triage

Managers play a vital role in helping advocates navigate and escalate issues with external professionals, ensuring the case progresses without undue delays. Advocates should:

- **Engage with managers to resolve challenges** where the case is unallocated, meetings are delayed, or information from the referrer is unclear.

- Managers can agree to **return a case to triage** if necessary, allowing new cases to be allocated, while pending cases receive the CST and managerial support needed to progress.

For cases open longer than *six months*, managers will reach out to the responsible team manager to discuss anticipated timelines for case conclusion. This process helps maintain a good flow of cases, supporting effective advocacy for all individuals.

Key takeaways for advocates

- **Prompt and structured communication**: Ensure timely initial contact with the referrer and establish a specific date for the Care Act process before reaching out to the person.
- **Escalation of challenges**: If scheduling or progress delays occur, discuss the situation with your manager promptly, who can assist in escalating the issue as needed.
- **Monitoring extended cases**: Be mindful of case duration. For cases open longer than six months, expect that a manager will reach out to relevant professionals to confirm a timeline for conclusion.
- **Ongoing safeguarding advocacy**: In safeguarding cases, actively seek updates and advocate for a clear case timeline to support the person's needs effectively, keeping potential risks and restrictions in mind.

By adhering to these guidelines, advocates ensure that Care Act cases are managed efficiently, with clear timeframes and regular oversight, enabling a more impactful and person-centred advocacy experience.