

<b>Job Title</b>	<b>Case Management Officer/ Team Leader</b>
<b>Job Family</b>	<b>Case Management</b>
<b>Service Area</b>	<b>Service Delivery</b>
<b>Grades</b>	<b>CMO : Level 1 (Band 2) Level 2 (Band 3) Level 3 (Band 4) Team Leader : Band 6</b>
<b>Job Reference</b>	

<b>Case Management Officers</b>	<b>Report to the Case Management Team Leader</b>
<b>Case Management Team Leader</b>	<b>Report to the Case Management Manager</b>

## Team Purpose

The Case Management Team will sit between the Customer Services Team and the Specialist Teams and will focus on delivering high quality and continuously improving services. Resolving issues as efficiently and effectively as possible on a wide range of the more technical, statutory and non-statutory, services, initiatives, activities and projects. This empowered and multi-skilled team will manage service requests, using technical knowledge, business rules, statutory guidance, systems and processes in place and following workflows. Once a case is passed to the Case Management Officer, the officer will act as the single point of contact for the customer on that case and will be responsible for resolving the case. Where a case is considered to be complex it is referred to a Specialist for guidance and advice.

## Role Purpose

### Case Management Officers

Working on a professional and integrated case management basis, the post holder will respond to and seek to resolve service requests from external customers using technical knowledge, business rules, statutory guidance, systems and processes and following workflows in place. Case Management Officers must ensure attention to detail, accuracy and excellent customer focus to deliver high standards of service and seek to resolve cases as quickly and efficiently as possible. The post holder will promote self-service where appropriate and ensure detailed and accurate records are kept using the Case Management system. Cases will cover a wide range of council services across different disciplines.. Case Management Officers will develop the range of skills, knowledge and in some instances, qualifications, required to undertake the role. The teams at all times will ensure a professional, inclusive and helpful approach to customers.

### Team Leader (as above and;)

The post holder will support the Case Management Manager in managing the teams to ensure work processes, standards and compliance are completed efficiently and effectively and continuously improved. Manage workflow and ensure cases are resolved as quickly and efficiently as possible. Undertake quality checking of work, providing training and support as required. Work with Customer Services and Specialists Services to ensure there is a clear understanding of the handoff points between each area. Maintain performance standards as agreed in conjunction with Case Management Manager and Performance and Policy Team and address any performance issues as they arise quickly and in accordance with policies.

**Key Accountabilities****All levels:**

- Ensuring accurate, professional and timely case management of service requests is provided to customers that supports the customer and the council's service delivery objectives.
- Ensure policies, procedures and workflows for dealing with all service requests are adhered to.
- Assist in ensuring the provision of fit for purpose service delivery systems and processes and ensure verification of all supporting documentation.
- Ensure strict confidentiality is maintained and data protection rules followed.
- Promote knowledge and understanding of case management processes and systems across the council.
- Identify improvements in customer and service provision, identifying synergies between service areas and where work activities overlap, reporting to Team Leaders so work areas can be combined appropriately.
- Manage customer interactions promptly and effectively, establishing the nature of the enquiry and then taking action or referring to another team. Ensure that the customer's preferred method of contact is captured and maintained.
- Promote customer self-service where appropriate and proactively market the benefits of digital and self-service channels to all customers.
- Ensure all customers are treated fairly and support and advice given based on their individual needs.
- Share knowledge and experience with others.
- Work with other team members to organise and manage workloads effectively, ensuring that all customer and performance standards and targets are achieved.
- Assessing risk, identifying potential fraud and working on complex cases in conjunction with Specialists.
- Actively develop and maintain knowledge of Council services, processes and procedures.

**Level 1**

- Undertake straight forward tasks that require understanding of relevant service processes, regulations and legislation.
- Will regularly refer to Team Leaders for advice and guidance.
- Little or no requirement to work with Specialists

**Level 2****As above and;**

- Undertake straight forward cases that will require some understanding of relevant service processes and compliance, regulations and legislation.
- Will regularly refer to Team Leaders for advice and guidance.
- Some requirement to refer to Specialists for case resolution

**Level 3****As above and;**

- Undertake more complex cases that will require good understanding of relevant service processes and compliance, regulations and legislation.
- Train, induct and mentor new staff in case management process in a specific area.
- Will occasionally refer to the Team Leader for advice and guidance.
- Requirement to refer to Specialists for case resolution, having a good understanding the handoff points between Customer Services and Specialist Services.

- Act as the single point of contact throughout the complete customer journey for a number of complex cases, co-ordinating activity with numerous specialists as required.

**Team Leader**

**As above and;**

- Have responsibility for specific areas working with specialists
- Day to day line management of the teams ensuring standards, processes and procedures are maintained and seek ways to continuously improve services
- Point of contact for complex escalated enquiries / cases identifying practical and possible new solutions to problems
- Manage a case load of more complex / escalated cases, referring to Specialists for case resolution as appropriate
- Effectively manage performance, standards and workflows.
- Use judgement to undertake decisions in relation to team / workload activity, only liaising with line manager in respect of highly contentious issues, minimising impact on other service areas and customers.
- Deal promptly and appropriately with any performance issues as they arise including instigating formal procedures if appropriate.
- Work collaboratively with Lead Specialists and Customer Service Manager in order to identify and develop new techniques and ways of working. In conjunction with Case Management Manager agree appropriate processes, training plans, goals and evaluation process.
- Maintain Service Level Agreements with Customer Services and Specialist Services by prioritising day to day work of the team.
- Create and manage staff rotas to ensure effective cover is provided at all times, managing annual leave and sickness absence for team.
- Train, induct and mentor new staff, identifying opportunities for multi-skilling team, maintaining training records as appropriate.
- Assist with recruitment.
- Undertake regular staff appraisals, personal development meetings and 121s as required.
- Deal with team sensitively and appropriately.
- Deputising in the absence of the Case Service Manager.

**Appointment and progression through grades will be based on the needs of the business.**

Key Objectives	
Working with customers	Resolve customer requests professionally, effectively and efficiently. Provide sound guidance and advice and ensure adherence to legislation and regulation. Develop and maintain good working relationships with customers, interacting through multiple channels. Develop and implement plans to facilitate customer engagement Proactively market the benefits of digital and self-service channels to all customers, taking forward customer enabling opportunities.
Working towards the Corporate Plan	Responsible for delivery of agreed objectives and services associated with the Corporate Plan.
Knowledge of services	Excellent understanding of the technical, statutory and non-statutory, services, initiatives, activities and projects provided across the Council and a good knowledge of the

## Key Objectives

	terminology and acronyms used by the services.
Using systems effectively	Good IT skills and ability to learn new systems quickly.

## Specific Tasks

Case Management skills	Working efficiently, professionally, paying attention to detail and following workflows when processing cases. Effective case management including handling related cases for a single customer, assessing risk, identifying potential fraud and working on more complex cases in conjunction with Specialist Officers (progression & higher level). Ensure outcomes meet legislative and professional standards.
Team work and working with others	Support, inform and guide customers new to the case management approach building understanding and confidence. Work collaboratively with colleagues to improve customer service, highlight opportunities for empowering customers further and participate in multi departmental project teams.
Enquiries, reports and service requests	Manage customer interactions promptly and effectively, establishing the nature of the enquiry and then taking action or referring to another team where appropriate. Knowing when to consult with or pass cases over to Specialists. Supporting customer self-serve by observing peaks or trends in interaction types and spotting opportunities to initiate further enabling and self-serve processes. This could involve championing own ideas, participating in multi departmental teams or project teams. Processing reports, responding to information requests, having a deep knowledge of the data required.
Processing and administration	Able to identify and develop opportunities for improving workflow / process and /or increasing customer self-serve or enabling; working on cases that require problem solving with customers. Access and accurately update all relevant information systems, both customer and back office, ensuring that data is updated and maintained through verification, and validation, and in accordance with Data Protection principles.
Strategy and policy	Provide input into corporate strategy, policy and programmes as required (progression & higher level)
Performance	Working towards achieving the KPIs set by the Case Service Manager.

## Qualifications

**Level 1:** Minimum of GCSE pass in English & Maths, or equivalent experience.

**Level 2:** Good standard of education with a minimum of 5 GCSEs or equivalent experience.

**Level 3:** Educated to NVQ level 3 / A Level standard or equivalent experience.

**Specific Tasks****Team Leader:**

Degree level educated or significant relevant experience.

Part qualified in a specialist service qualification or working towards this (desirable).

**Knowledge, Skills and Experience****Level 1:**

- Understanding of customer focused, service delivery role
- Proven ability to analyse and respond to requests and understanding when to escalate a case.
- Proven ability to be accurate, detailed and professional in approach to work.
- Proven ability to deliver high standards and good customer service.
- Strong ICT skills and proven ability to learn new systems quickly.

**Level 2:**

- Some experience (minimum one year) of working in a customer focused, service delivery role and good admin skills.
- An understanding of the relevant legislation and regulations applied to area of service delivery.
- Proven ability to analyse and respond to requests and understanding when to escalate a case.
- Proven ability to be accurate, detailed and professional in approach to work.
- Proven ability to deliver high standards and good customer service.
- Strong ICT skills and proven ability to learn new systems quickly.

**Level 3**

- Extensive experience (minimum 2 years) in working in a customer focused, service delivery role.
- Proven ability to understand and comply with legislation and regulations in day to day business.
- Solid understanding of case management approach and experience of dealing with more complex cases and providing multi-disciplinary support.
- Proven ability to analyse, problem-solve and respond to requests and understanding when to escalate a case.
- Proven ability to be accurate, detailed and professional in approach to work.
- Proven ability to deliver high standards and good customer service.
- Strong ICT skills and proven ability to learn new systems quickly.

**Team Leader**

As above and

- Proven ability to lead a team with experience in all aspects of people management including effectively manage performance, setting targets and dealing with issues as they arise. Experience in setting, maintaining and monitoring standards of accuracy, diligence and service delivery.
- Experience in selection and recruitment.

**Specialist Knowledge**

**Specialist Knowledge**

Depending on the level and nature of the work undertaken some post holders may be required to hold technical/specific qualifications.

**Signed (Job Holder):****Date:****Signed (Service Lead):****Date:**

## Behaviours Framework

Central to the delivery of the role are the Council's values and behaviours and all employees are expected to work within the Council's Core Behaviours Framework. These are shared by all employees and applied to everything we do. The points for each behaviour are shown below.

Generic Staff Behaviours	Definition
Adaptability & Flexibility	Respond positively to change and adapt own behaviour or work practices when there is a change in the work environment.
Customer Service	Demonstrating an understanding that customers and customer satisfaction are the foundations of the organisations success.
Communication	The ability to communicate well through a variety of communication methods.
Personal Improvement (own learning & development)	The ability to see where personal improvements can be made, and the willingness to undertake development opportunities to achieve them.
Taking Responsibility and Achieving Results	The ability and willingness to focus on achieving individual and organisational goals.
Working with Others	The willingness to act as part of a team and work towards achieving organisational goals and outcomes.

All employees are expected to be flexible in undertaking the duties and responsibilities attached to their role and may be asked to perform other duties, which reasonably correspond to the general character of their role and their level of responsibility. All employees are required to be flexible to undertake out of hours work as required, meetings outside office hours will be routine and officers will be expected to attend. This job description will be supplemented and further defined by annual objectives which will be developed in conjunction with the post holder.

This job description will be subject to review and the Council reserves the right to amend or add to the details.

## Key Policies

We are an equal opportunities employer and therefore all staff are expected to comply with our equality policies and help create a work environment in which everyone is treated with dignity, respect, courtesy and fairness. You are also expected to fully comply with Health and Safety Policies and procedures in force to help maintain and develop a safe working environment. In pursuing a practice of continuous improvement and seeking to obtain best value in all aspects of the service, staff will be expected to assist in other such duties as may be allocated for the benefit of the organisation and their own personal development. Staff will be expected to assist if the council has to deal with the results of a civil emergency.