

Ability to co-ordinate casework across different agencies and/or individuals

Competences associated with the coordination of casework are not 'stand alone' competencies and should be read as part of the competency framework for individuals with Personality Disorder.

The principles set out in this document apply both to intra- and inter-agency working, and hence to work with both fellow-professionals and professionals from other agencies.

Effective delivery of these competences depends on their integration with many areas of the framework, but the section on confidentiality and consent will be especially pertinent.

General principles

An ability to draw on knowledge that a focus on the welfare of the client should be the overarching focus of all intra- and interagency work

An ability to ensure that communication with professionals both within and across agencies is effective by ensuring:

that their perspectives and concerns are listened to

that there is explicit acknowledgement of any areas where perspectives and concerns are held in common, and where there are differences

where differences in perspective or concern are identified, an ability to identify and act on any implications for the delivery of an effective intervention

Case management

Receiving referrals from other professionals/agencies

An ability to recognise when the referral contains sufficient information to make an informed decision about how to proceed with the client (including response to risk and identification of care pathways)

where there is insufficient information, an ability to identify the information required and to request this from the referrer and/or partner agencies

An ability to draw on knowledge of local policy and procedure to select the appropriate "pathway" to ensure the case is allocated at an appropriate risk/response level

Where a decision is taken to place clients on a waiting list, an ability regularly to monitor risk levels of cases on the list

Initial contact phase (initiating cross-agency casework)

An ability to establish which partner agencies are also involved with the client	
An ability to establish/clarify the roles/responsibilities of other agencies in relation to the various domains of the client's life	
An ability to discuss issues of consent and confidentiality in relation to the sharing of information across agencies with the client and to secure and record their consent to share information.	
An ability to identify and record which service, and which individuals within that service, will carry a "co-ordination" role for the overall plan	
An ability to gather relevant information from involved agencies and to enter this into the client's record	
An ability to share relevant information with the appropriate agencies (based on the principle of a "need to know")	
	an ability to assess when sharing of information is not necessary and/or when requests for sharing information should be refused
An ability to share assessment information in a manner which supports partner agencies in:	
	understanding and recognising areas of risk
	understanding any implications of this information for the work in which they are engaged
	understanding the potential impact of interventions on the client's functioning, and the ways in which this may manifest in other settings
	understanding what it means for the client to have an involvement with the multiple agencies
Where there are indications that agencies may employ different language and definitions, an ability to clarify this in order to identify:	
	the reasons for any concerns
	the professionals and agencies who are best placed to respond to these concerns
	the outcomes which are being sought from any planned response
An ability to draw on knowledge of custom and practise in each agency in order to ensure that there is a clear understanding of the ways in which each agency will respond to events (e.g. their procedures for following-up concerns, or for escalating their response in response to evidence of risk)	
An ability to co-ordinate with other agencies using both verbal and written communication, and to agree with them:	
	the tasks assigned to each agency
	the specific areas of responsibility for care and support assumed by each agency, and by individuals within each agency
An ability for all individuals within a team to recognise when they are at risk of working beyond the boundaries of their clinical expertise and/or professional reach	
Where a common assessment framework is used across agencies, an ability to:	
	record relevant information in the shared record
	make active use of the shared record (to reduce redundancy in the assessment process)
	maintain a shared record of current plans, goals and functioning

Involving the client and (where relevant) their family

An ability to ensure that the client (and where relevant, their family) are informed of any interagency discussions and the associated outcomes.
When deemed appropriate, an ability to include the client and/or their family in any interagency meetings.
An ability to support clients and/or families in making choices about how they use or engage with the partner agencies involved.

Referring on for parallel work

An ability to draw on knowledge of local referral pathways (i.e. the individuals to approach and the protocols and procedures to be followed)
In relation to any agency to whom clients are referred, an ability to draw on knowledge:
of the agency's reach and responsibilities
of the agency's culture and practice
of the extent to which the agency shares a common language and definitions to those applied in those services making the referral
An ability to communicate the current intervention plan, and update other agencies with any changes as the intervention proceeds (including any implications of these changes for the work of other agencies)
An ability to communicate a current understanding of the client's difficulties, and to ensure that this is updated when additional information emerges.
An ability to maintain a proactive approach to monitoring the activity of other agencies and to challenge them if they do not meet agreed responsibilities
Where appropriate, an ability to act as a conduit for information exchange between agencies
An ability to recognise when effective inter-agency working is compromised and to identify the reasons for this, for example:
institutional/systemic factors (such as power differentials or struggles for dominance of one agency over another)
conflicts of interest
lack of trust between professionals (e.g. where this reflects the 'legacy' of previous contacts)
An ability to detect and to manage any problems that arise as a result of differing custom and practice across agencies, particularly where these differences have implications for the management of the case
an ability to identify potential barriers to effective communications, and where possible to develop strategies to overcome them
An ability to identify transitions that have implications for the range of agencies involved (e.g. moving out of area) and to plan how these can be managed, to ensure:
continuity of care
the identification of and management of any risks
the identification and engagement of relevant services
An ability to be aware when the client's needs (in the domains of health, , physical, emotional, social functioning) are not being met by the current intervention, and where the involvement of other agencies would be beneficial to the client's welfare

Discharge and monitoring phase

An ability to inform all relevant agencies where there is an intention to discharge the client
An ability to ensure all partner agencies are aware of current risk levels and have appropriate plans and monitoring in place
An ability to inform partner agencies of the circumstances under which links with current services should be reinstated
An ability to take a proactive stance in relation to monitoring the functioning of clients after discharge has taken place (and to reconnect with them if functioning deteriorates)
An ability to ensure those partner agencies involved have plans for monitoring the wellbeing of the client