

Instructions on using your Caseload Management Tool

Contents

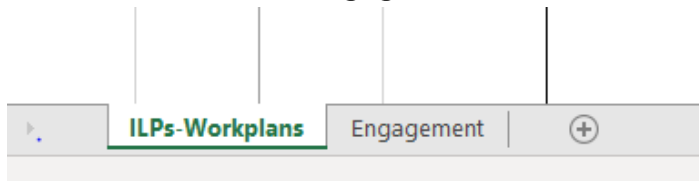
ILP-Work Plans and Engagement Tabs.....	2
Example of how to complete the ILP-Workplans sheet.....	2
Step 1. Recording first session and targets.....	2
Step 2. Review of targets achieved and targets set for next quarter	4
Example of first ILP review.....	4
Example of first work plan review	5
Step 3. completing further reviews	6
Notes Section	6
Extended Review.....	6
Step 4. Submission of paper ILP and Work Plans.....	7
How to complete the Engagement sheet	8
Non-Engaging Students.....	8
Misc. Students.....	8

Instructions on using your Caseload Management Tool

- Once you receive your spreadsheet please save this onto your computer
- Your spreadsheet is password protected and you will receive guidance on your password, if not please contact your coordinator
- When you open your spreadsheet, you will see a list of student names, these are the students we have a record of you actively providing support to.
- If you are a new member of the team your spreadsheet will start off blank

When you open the spreadsheet you will see two tabs at the bottom left corner of your screen, if you click on these tabs you will see you have 2 sheets to keep updated.

ILP-Work Plans and Engagement Tabs



ILP-Work Plans – is where you will complete the information required for your ILPs (Tutors) Work Plans (Mentor)

Engagement – is where you note any students that have been referred to you and have not engaged within the first two weeks of referral that you refer back to your coordinator. You will also make a note of any other students that are not currently receiving support and the reason for this.

Example of how to complete the ILP-Workplans sheet

Step 1. Recording first session and targets


You add 1) student name 2) first session date 3) targets discussed

Example is from an ILP

Instructions on using your Caseload Management Tool

	A	B	C	D
1	Staff: Roberto Cornelius Fudge		First Session	
2	Student	Notes	ILP/WP Signed	1st Targets Identified
3				1st Act
4	Gill Yates		01/10/2019	Time management and Research strategies
5	Richard James Hendricks	Not accessing support	28/09/2019	Proof reading strategies, Referencing
6	Delia Smith		08/10/2019	Assignment Planning and Understanding assignment briefs
7	Gregg Smith		05/10/2019	Time management and Structuring Essays

Example of what needs to be completed for the first session on your spreadsheet



The Learning Support Centre
Dyslexia & Disability Specialists

Individual Learning Plan (ILP)

Student Initials:	GY Gill Yates <small>insert full name on submission</small>	Contact Number:	07573282937
Email Address:	gyates@msn.com	CRN:	0811576910
Course and year of study:	Maths 1	University:	JHU
Number of Hours Allocated:	30	Frequency of Hours Agreed & Location: <small>(e.g. 1 hour per week at the library support room)</small>	1 hr per wk library
Placements: <small>(skype?)</small>	Yes not funded	Academic Year start and end date:	Oct 2019 June 2020

Please sign to say that you understand that:

- Your work is your own responsibility and your Study Skills Tutor cannot advise you about the subject or content of your work,
- You are expected to attend your 1:1 session on a regular basis,
- If you miss booked appointments, there may be a charge for the sessions,
- I understand that my Study Skills Tutor cannot proofread my university/college work but can provide proofreading strategies.

Student Name: Gill Yates Signature: 

Date: 02/10/19

Tutor Name: Donna Welburn Signature: 

Date: 02/10/19

First session, targets identified by student and tutor (SMART)

- Time management
- Research methods

Scan and submit via email to admin@learningsupportcentre.com however we ask that each document is named as follows: Student Initial and Surname Doc name and academic year JSmithILP19.20 and please ensure the whole document is within one scan and the right way up. Deadline for submission is the 30th June or if support is provided over the summer due to the course type please submit by 31st August.

ALL Individual Learning Plans MUST be SIGNED and DATED for audit purposes.

STUDENT SUPPORT MUST BE REVIEWED EVERY 3 MONTHS AS A MINIMUM

Example of what your front sheet should look like


Instructions on using your Caseload Management Tool

Step 2. Review of targets achieved and targets set for next quarter

Example of first ILP review


Staff: Roberto Cornelius Fudge		First Session		First Review			Second Review	
Student	Notes	ILP/WP Signed	1st Targets Identified	1st Targets Achieved	1st Review Signed/ Dated	2nd Targets Identified	2nd Targets Achieved	2nd Review Signed/ Dated
Gill Yates		01/10/2019	Time management and Research strategies	managing time using phone to support, started to use research databases further support	21/12/2019	Research Strategies and Assignment planning		
Richard James Hendricks	Not accessing support	28/09/2019	Proof reading strategies, Referencing	COPSE strategy which is working well. Using reference template in line with	20/12/2019			
Delia Smith		08/10/2019	Assignment Planning and Understanding assignment briefs		TO DO FIRST WEEK BACK IN JAN			
Gregg Smith		05/10/2019	Time management and Structuring Essays	assignments mapped out in planner and time split accordingly. Used of mind mapping and	18/12/2019	use AT software and look at mind mapping as very visual. Structuring Assignments		

ILP back page



The Learning Support Centre
Dyslexia & Disability Specialists
www.learningsupportcentre.com

Individual Learning Plan (ILP)

Review Timeline	Review: work covered and strategies in use	Future recommendations and revised targets	Date and student and staff signature
Within 3 months of first session	<p>1st review</p> <p>using phone calendar for reminders with colour coding</p> <p>Starting to look at search terms to refine research</p>	<p>1st review</p> <ul style="list-style-type: none"> - Research Strategies • Assignment planning 	<p>Date: 08/12/2019</p> <p>Student: G. Yates</p> <p>Tutor: </p>
6 months	<p>2nd review</p>	<p>2nd review</p>	<p>Date:</p>


Instructions on using your Caseload Management Tool

Example of first Work Plan review

Staff: Roberto Cornelius Fudge		First Session		First Review			Second Review		
Student	Notes	ILP/WP Signed	1st Targets Identified	1st Targets Achieved	1st Review Signed/ Dated	2nd Targets Identified	2nd Targets Achieved	2nd Review Signed/ Dated	3rd Targets Identified
Gill Yates		01/10/2019	Managing relationships with peers	Settled into accommodation, finding grp work a challenge on course put strategies in to manage this	21/12/2019	Reduce procrastination around academic work			
Richard James Hendricks	Not accessing support	28/09/2019	Time management and self care	Routines in place with checklist, ensure any chnages are discussed	20/12/2019	Meeting deadlines and improving sleep pattern			
Delia Smith		08/10/2019	Accessing Library and Student Union	Accessed together. Avoiding peak times which is working well	18/12/2019	Accessing research tools and managing reading			
Gregg Smith		05/10/2019	Attending sessions and Time management		TO DO FIRST WEEK BACK IN JAN				

Work Plan back page

Mentoring Work Plan

Review Timeline	Review: work covered and strategies in use	Future recommendations and revised targets	Date and student and staff signature
Within 3 months of first session	1 st review managing relationships well with people in halls concerns about grp work reduced with communication strategies	1 st review Reduce procrastination around academic work	Date: 12/12/19 Student: A. Yates Mentor: 
3 months	2 nd review	2 nd review	Date:

Instructions on using your Caseload Management Tool

NOTE

- *Reviews are to be completed within 3 months of the last review (timelines set by our auditors)*
- *You can add notes as reminders in red or highlight when a review is due if that helps*
- *You can write in pencil on your ILP or Workplan when a review is due to ensure you meet this deadline.*

Step 3. completing further reviews

You will complete a 2nd and 3rd review if your student started at the beginning of the academic year and completes in June. If they have just 2 reviews due to a late start, you can make a note in the notes section.

Notes Section

Staff: Roberto Cornelius Fudge		First Session	
Student	Notes	ILP/WP Signed	1st Targets Identified
Gill Yates	Support started in Jan hence 2 reviews	27/01/2019	Managing relationships with peers

Extended Review

At the end of the academic year if your student has been granted extensions or the course runs through the summer and support has been approved you will need to carry out a review at your final session.

We will receive a fail at audit if there are support sessions invoiced after the last review date.

Instructions on using your Caseload Management Tool

	Third Review		Extended Review	
gets red	3rd Review Signed/ Dated	Extended Term Targets Identified	Extended Term Targets Achieved	Final Review Signed/ Dated

Note: if the majority of your students complete in June however you have a couple that complete in August. You need to ensure they have had a final review at their final session and submit your spreadsheet for the last time in August.

Step 4. Submission of paper ILP and Work Plans

When you submit your paper ILP's or Work Plans you will be given a receipt, this will be in the form of an email acknowledgement confirming who's ILP's and Work Plans we have received. We ask you submit these at the same time as you submit your spreadsheet in June and where applicable in August. You can submit your paperwork as follows:

- 1) Scan and submit via email to admin@learningsupportcentre.com however we ask that each document is named as follows: Student Initial and Surname Doc name and academic year **DWelburnILP19.20 or DWelburnWP19.20 and please ensure the whole document is within one scan and the right way up**
- 2) Posted - recorded delivery
- 3) Brought into the office

You may want to keep a copy for your records if the student isn't completing that academic year.

Once the student has completed their studies all paper documents should be submitted to the office.

Submission Column

You will be required to note the date you submitted your paper work and who to, if posted please make a note of who acknowledged receipt and when. If you don't receive an acknowledgement email it is your responsibility to chase this up.

	Submission	
Final Review Signed/ Dated	Date ILP/WP Submitted To Office	Submitted to

Note: Before the start of the next academic year we will send you an updated Case Load spreadsheet with your continuing students and new referrals at that point.

Instructions on using your Caseload Management Tool

How to complete the Engagement sheet

Non-Engaging Students

This sheet is to keep a record of your students that are not engaging in support sessions regularly.

If you get a referral and the student does not reply to you to set up a session or a student goes off the radar after 2 weeks of attempted contact, you should inform your coordinator and Amy Niland.

When making a note of the student not engaging on the engagement sheet also add a note in the notes section of the ILP-Workplan sheet as your coordinator will then be able to see instantly why reviews are omitted.

Staff: Roberto Cornelius Fudge		Non-Engaging Students	
Student Name	Referred Back To Office	Referred To	Last ILP/WP Review Date
Richard James Hendricks	Yes	Angela Wright	

Misc. Students

This is where to list students that are not engaging however we know why and can schedule in when to contact them. So they remain on your caseload. Examples can be seen below:

Misc Students					
Student's First Name	Student's Last Name	Student Status	Notes	Date Agreed To Contact Student	Last ILP/WP Review Date
Joe	Smith	Interrupted	Due to ill health	No agreed date	11/11/2019
Sam	Cox	Support on Hold	Funding isn't approved, forms have been sent Olivia (Coordinator) will let me know when support can recommence	No agreed date	12/12/2019
Ali	Mall	Placement	Sandwich course - support not funded this year	15/09/2020	21/06/2019

For Miscellaneous students the status dropdown box includes:

Instructions on using your Caseload Management Tool

Placement	If support is not funded during the placement
Deferred	If a student has decided to postpone starting back at University however plans to come back
Interrupted	If a student for personal reasons such as bereavement or ill health has decided to pause their studies
Withdrawn	If the student withdraws from the course it is worth noting so the coordinating can see why there are gaps on your ILP-Workplan tab
Support on Hold	If invoices are not paid or the student has missed more than 2 sessions in one term.
Declined	The student doesn't currently want support

If you are unsure of what status to allocate please seek advice from your coordinator. Please remember your Coordinator and the office team are here to support you with managing your caseload.

Please ensure you keep your spreadsheet up to date and submit this at the end of the following months to admin@learningsupportcentre.com

- 1) December
- 2) March
- 3) June
- 4) August

Reminders will be sent via The Voice.

If between those months you have concerns about your students engagement please contact Amy Niland – Quality and Engagement Coordinator at Amy@learningsupportcentre.com and she will support you with actively re engaging your students.