­**Primary Case Holder Role**

**Pre Initial Assessment:**

The primary case holder will be identified during the Intake Meeting and before the IA they will:

* Review the referral
* Ensure any missing information has been gathered ahead of the IA (seeking consent/information themselves or delegating tasks within the IA team if more appropriate e.g. ABE summary)
* Contact the social worker and the team around the family for further information ahead of the IA and to invite them to the 10am professionals meeting on the morning of the appointment. (Social workers will usually have been invited to be part of the appointment itself by Lighthouse admin team or SCLO)
* Identify a representative from the Lighthouse to attend the strategy meetings or case conferences for the child/young person – this is likely to be themselves as Primary Case Holder, unless another allocated team member is more appropriate

**During the Initial Assessment:**

* Chair the pre-assessment professionals’ meeting
* Lead the discussion in the pre IA meeting to decide how the IA will be conducted and who will request the consent for the data collection
* At the end of the virtual IA, discussing who will complete the Excelicare forms, and who will write the first draft of the IA letter and be responsible for sending it to the other members of the team
* Discuss/feedback the outcome of the IA in the daily 1:30 CAMHS meeting

**Post Initial Assessment:**

* Key worker for the child or young person
* Main point of contact for the child, young person and family
* Liaison with other professionals within the Lighthouse that have been allocated the child/young person to ensure case coordination and the child/YP is seen regularly
* Arrange case discussion with the rest of the Lighthouse allocated team if anyone is worried/concerned about the child/young person
* Maintain accountability for the child/young person until they handover Primary Case Holder role to another practitioner or close the case (and send closure letter) – after a verbal discussion with the receiving practitioner they should update Excelicare allocation record. The decision to remain Primary Case Holder should be reviewed at supervision regularly.
* Ensure that there are updated risk assessments and care plans
* Check that ‘Patient Details’ on file are up to date and accurate e.g. address , school, contact details
* Ensure that they or another allocated team member completes the consent forms with the child/young person and that it is documented on Excelicare
* Respond to requests from OIC or Court to review or receive copies of notes; with support from PLO and clinical leads and in line with guidelines