Casework Protocols (Updated March 2016)

When one of our members requires assistance with personal casework, the standard procedure is for the member to contact the Branch Officer (BA), who will be in the office on Wednesdays.

If for some reason the member goes straight to their Faculty Rep for help, the Rep should ask them to contact the BA to receive the form, and the procedure will then follow steps (1) to (5).

If the BA is on leave, the member should contact the Branch Chair. The Branch Chair will follow the same steps as the BA – save for step (3) – and forward the information to the BA to be recorded upon return.

Standard procedure:

1. The member contacts the BA via phone, email, or in person, and the BA firstly checks if the person is indeed a current UCU member, and then, if so, provides them with the casework form to complete. Alternatively, the member can download the casework form from our website.

2. The member sends the form back to the BA.

3. The BA records the information in the casework form in a centralized excel table. This will allow the BA and officers to keep track of ongoing cases and maintain an archive of our past casework.

4. The BA then passes on the form to the relevant Faculty Rep, who then assists the member with their case as laid out in the booklet on "Handling Casework: A Guide for UCU Reps" (http://www.ucu.org.uk/Caseworkers).

5. The Faculty Rep reports back to the BA regarding Action Taken.

The entire process is to follow strict confidentiality guidelines.