**Improving casework management project: time capture exercise**

<Data capture template - week commencing xxx>

As part of the service improvement programme, we are looking to better understand the challenges of managing high caseloads which we know is causing stress on the service. This will provide us with key insights to make informed changes to start addressing these issues. All outputs will be shared openly and you will be involved in any discussions around proposed changes and improvements. Responses will remain anonymous.

*Instructions:*

- Please complete the ‘My info’ and ‘My week’ sections now

- As you go through the week, please indicate which activity you have spent that time period on **(only if you have that time period for casework)**

- It only needs to the **one activity** that best represents how you used that time period

- You do not need to tick anything for your lunch hour

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **My info**   |  |  | | --- | --- | | Role |  | | Team |  |   **My week**  *Please tick* |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| <amend to reflect your rota options> | Monday | | Tuesday | | Wednesday | | Thursday | | Friday | |
| AM | PM | AM | PM | AM | PM | AM | PM | AM | PM |
| Annual Leave |  |  |  |  |  |  |  |  |  |  |
| CRM/Duty to Refer |  |  |  |  |  |  |  |  |  |  |
| On duty/ appointments |  |  |  |  |  |  |  |  |  |  |
| **Time for casework** |  |  |  |  |  |  |  |  |  |  |
| Other (e.g. training, meetings, other leave, supervision etc.) |  |  |  |  |  |  |  |  |  |  |

**My casework time -** *Please tick*

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Monday | | | | | | | | | | | | | | | |
| 09.00 - 09.30 | 09.30- 10.00 | 10.00 - 10.30 | 10.30 - 11.00 | 11.00 - 11.30 | 11.30 - 12.00 | 12.00-  12.30 | 12.30-13.00 | 13.00-13.30 | 13.30-  14.00 | 14.00-  14.30 | 14.30-15.00 | 15.00-15.30 | 15.30-  16.00 | 16.00-16.30 | 16.30-17.00 |
| **Completing relief or prevention actions within personalised housing plans**  *This could include making referrals to partner agencies, supported housing referrals, as well as liaison with landlords or working on Homefinder moves* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Dealing with (unplanned) contact from customers for my open cases**  *e.g. emails about temporary accommodation, requests for case updates* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Planned contact**  *Outgoing phone calls, emails, appointments & reviews with customers for my open cases* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Making enquiries into homeless applications**  *e..g experian, land registry, council tax* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Writing and issuing decision letters** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Admin on <case management system>**  *Recording outcomes, editing fields, uploading documents, H-CLIC checks etc.* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Other use of casework time**  *If there have been network issues this can be included here* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**My casework time -** *Please tick*

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Tuesday | | | | | | | | | | | | | | | |
| 09.00 - 09.30 | 09.30- 10.00 | 10.00 - 10.30 | 10.30 - 11.00 | 11.00 - 11.30 | 11.30 - 12.00 | 12.00-  12.30 | 12.30-13.00 | 13.00-13.30 | 13.30-  14.00 | 14.00-  14.30 | 14.30-15.00 | 15.00-15.30 | 15.30-  16.00 | 16.00-16.30 | 16.30-17.00 |
| **Completing relief or prevention actions within personalised housing plans**  *This could include making referrals to partner agencies, supported housing referrals, as well as liaison with landlords or working on Homefinder moves* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Dealing with (unplanned) contact from customers for my open cases**  *e.g. emails about temporary accommodation, requests for case updates* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Planned contact**  *Outgoing phone calls, emails, appointments & reviews with customers for my open cases* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Making enquiries into homeless applications**  *e..g experian, land registry, council tax* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Writing and issuing decision letters** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Admin on <case management system>**  *Recording outcomes, editing fields, uploading documents, H-CLIC checks etc.* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Other use of casework time**  *If there have been network issues this can be included here* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**My casework time**

*Please tick*

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Wednesday | | | | | | | | | | | | | | | |
| 09.00 - 09.30 | 09.30- 10.00 | 10.00 - 10.30 | 10.30 - 11.00 | 11.00 - 11.30 | 11.30 - 12.00 | 12.00-  12.30 | 12.30-13.00 | 13.00-13.30 | 13.30-  14.00 | 14.00-  14.30 | 14.30-15.00 | 15.00-15.30 | 15.30-  16.00 | 16.00-16.30 | 16.30-17.00 |
| **Completing relief or prevention actions within personalised housing plans**  *This could include making referrals to partner agencies, supported housing referrals, as well as liaison with landlords or working on Homefinder moves* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Dealing with (unplanned) contact from customers for my open cases**  *e.g. emails about temporary accommodation, requests for case updates* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Planned contact**  *Outgoing phone calls, emails, appointments & reviews with customers for my open cases* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Making enquiries into homeless applications**  *e..g experian, land registry, council tax* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Writing and issuing decision letters** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Admin on <case management system>**  *Recording outcomes, editing fields, uploading documents, H-CLIC checks etc.* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Other use of casework time**  *If there have been network issues this can be included here* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**My casework time**

*Please tick*

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Thursday | | | | | | | | | | | | | | | |
| 09.00 - 09.30 | 09.30- 10.00 | 10.00 - 10.30 | 10.30 - 11.00 | 11.00 - 11.30 | 11.30 - 12.00 | 12.00-  12.30 | 12.30-13.00 | 13.00-13.30 | 13.30-  14.00 | 14.00-  14.30 | 14.30-15.00 | 15.00-15.30 | 15.30-  16.00 | 16.00-16.30 | 16.30-17.00 |
| **Completing relief or prevention actions within personalised housing plans**  *This could include making referrals to partner agencies, supported housing referrals, as well as liaison with landlords or working on Homefinder moves* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Dealing with (unplanned) contact from customers for my open cases**  *e.g. emails about temporary accommodation, requests for case updates* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Planned contact**  *Outgoing phone calls, emails, appointments & reviews with customers for my open cases* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Making enquiries into homeless applications**  *e..g experian, land registry, council tax* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Writing and issuing decision letters** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Admin on <case management system>**  *Recording outcomes, editing fields, uploading documents, H-CLIC checks etc.* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Other use of casework time**  *If there have been network issues this can be included here* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**My casework time -** *Please tick*

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Friday | | | | | | | | | | | | | | | |
| 09.00 - 09.30 | 09.30- 10.00 | 10.00 - 10.30 | 10.30 - 11.00 | 11.00 - 11.30 | 11.30 - 12.00 | 12.00-  12.30 | 12.30-13.00 | 13.00-13.30 | 13.30-  14.00 | 14.00-  14.30 | 14.30-15.00 | 15.00-15.30 | 15.30-  16.00 | 16.00-16.30 | 16.30-17.00 |
| **Completing relief or prevention actions within personalised housing plans**  *This could include making referrals to partner agencies, supported housing referrals, as well as liaison with landlords or working on Homefinder moves* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Dealing with (unplanned) contact from customers for my open cases**  *e.g. emails about temporary accommodation, requests for case updates* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Planned contact**  *Outgoing phone calls, emails, appointments & reviews with customers for my open cases* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Making enquiries into homeless applications**  *e..g experian, land registry, council tax* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Writing and issuing decision letters** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Admin on <case management system>**  *Recording outcomes, editing fields, uploading documents, H-CLIC checks etc.* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Other use of casework time**  *If there have been network issues this can be included here* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |