

	<b>INDIVIDUAL WORKLOAD PLANNER</b>	Employee :	
		Period from / to :	
		Supervisor:	
<b>CSC:</b>			

## 1. ACTIVITY HOURS

### Section 1: Activity Hours

*This is where the caseworker enters the planned hours which do not involve direct casework tasks and activities. The total of activity hours for the reporting period is then subtracted from the 140 contract hours. The balance is then carried to the next section and are the available hours left to plan direct casework tasks and activities.*

Activity	Planned	Comment	Completed
Secondment			
Leave			
Other			
Staff Development			
Case Reviews / Workload Planner			
Supervision (Group & Individual)			
PDP			
Intake Duties			

Administration / Non-Casework			
Meetings: General			
Community Development			
Aboriginal Consultation			
Hours Adjustment ( Part /Time)			
Team / Unit Meeting			
Secondary Work			
Travel Time			
<b>TOTAL ACTIVITY HOURS:</b>		<b>NON-CASE HOURS COMPLETED:</b>	
<b>TOTAL OF CASEWORK HOURS:</b>			
<b>BALANCE OF HOURS AVAILABLE:</b>			

## 2. ALLOCATED HOURS

### Section 2: Allocated Hours

*This section is where the agreed planned tasks and activities are recorded for each plan / case, in line with available hours. **This relates only to those cases that are allocated to you. Any plan/case that you can not work on during the planner period should NOT be allocated to you.***

Plan Name	Plan N°	Type	Priority	Planned	Comment	Completed
<b>TOTAL OF ALLOCATED HOURS:</b>					<b>TOTAL ALLOCATED HOURS COMPLETED:</b>	

## 3. UNPLANNED HOURS WORK COMPLETED DURING THE PERIOD

### Section3: Unplanned Hours Work Completed During the Period

*This section is where the any / all unplanned tasks and activities completed during the period are recorded for each plan / case.*

Plan Name	Plan N°	Type	Priority	Hours	Comment	Completed
<b>TOTAL OF UNPLANNED HOURS:</b>					<b>TOTAL UNPLANNED HOURS COMPLETED:</b>	

#### 4. TASKS CARRIED OVER TO NEXT PERIOD

Section 4: Tasks Carried Over to the Next Period

*This section is where any /all tasks and activities carried over to the next period for consideration are recorded.*

Plan Name	Plan N°	Type	Priority	Comment	Hours

<b>TOTAL HOURS CARRIED OVER:</b>					

## 5. ALLOCATED CASE REVIEW

### Section 5: Allocated Case Review Form

*This form section is where the key elements of each plan /case being reviewed are recorded.*

<b>Plan Name:</b>		<b>Plan N°</b>		<b>Legal Status:</b>	
<b>Time Allocated:</b>		<b>Priority:</b>		<b>Date of Last Review:</b>	
<b>Current Situation:</b>					
<b>Action since last Review:</b>					
<b>Action Required:</b> <input type="checkbox"/> This Period <input type="checkbox"/> Next Period					

<b>Case Plan Amendments:</b>

## 6. WORKLOAD PLANNER REVIEW

### Section 6: Workload Planner Review

*This section is where all the activity, allocated and unplanned hours are reviewed and if necessary adjusted as required. Both the caseworker and supervisor are to sign and date this section. This is important to ensure that the workload planning process is transparent and consultative.*

	Period:		
	Hours:	Planned	Completed
TOTAL ACTIVITY HOURS:			
TOTAL ALLOCATED HOURS:			
TOTAL UNPLANNED HOURS:			
TOTAL HOURS:			

**Comments:**

.....

**Caseworker**  
**Date:**

.....

**Manager Casework**  
**Date:**

## Guide for the use of the Workload Planner

*The Workload Planning tool provides the framework for calculating and negotiating the time required to undertake tasks planned for the flex period. The tool requires a record of each case name. There is provision on the tool to record task related information that is being planned for the four week period and an agreed time that each task will take.*

*The process is a discussion between the supervisor and the caseworker and each task is calculated using the guidelines provided by the PSA and considerate of travel in accordance with the RTA road rules, journey to and from, road works, weather etc. The guidelines are to be used flexibly and in consideration of the skill set and experience of each individual caseworker and should reflect fair negotiation and mutual agreement.*

*Preparation for the process requires access to an un-interrupted period of time and a quiet place, a routine schedule of planning sessions, punctuality and agreement that wherever a critical event delays the process, responsibility lies with the worker and the supervisor to promptly negotiate an alternate date and time. The supervisor and caseworker will require a computer to record the plan and an e-mail copy of the agreed planner must be immediately available to the caseworker and supervisor following the planning session a paper copy signed by both the caseworker and the supervisor should be retained by both parties. Caseworkers should be encouraged to update their planner prior to the session including information about any new cases and their recommendations about the type of activity which will produce the best outcome for children and families during the four week work period. The same workload planner can usually be updated monthly to reflect any new cases or casework priorities for existing clients.*

*The workload planner **cannot contain activity that exceeds the paid hours** with the exception of the accumulation of flex time that can be accrued in a four week period.*

*Caseworkers should be encouraged to record on their planner's details including any deviations to the planned activity caused by the occurrence of unexpected or critical incidents or urgent re-tasking or reprioritisation by the supervisor. This information is vital for use in the next planning session when being asked to explain why certain tasks or activities were not undertaken during the last workload period and when negotiating tasks to be carried over to the next workload period.*



*The process need only take up to two hours and the session should be included on the planner and undertaken separately from the supervision & PDP process and timeframe. **Supervision and PDP processes are distinctly separate processes from Workload Planning sessions and should not be combined.***

*Any disputes about time allocated for each task, (if not resolved in the planning session) should be referred up to your PSA representative. Any activities being undertaken outside the workload planner e.g. after hours' callouts or foster parent training on the weekends should be dealt with as overtime in line with the award provisions.*

*The workload planning tool (or work not completed in the period) should not be used to decline flex leave. Flex leave should be administered in line with the Premiers Department provisions, not on individual interpretations by local supervisors.*