2015 WORKLOAD PLANNER - FAQs

What is the Workload Planner (WLP)?

The PSA's Workload Planning tool (WLP) is a flexible caseload planning tool which assists to determine safe and workable caseload for Community Services casework staff.

The Workload Planner was designed by PSA Delegates and Members and endorsed by Community Services. It is both a case planning and case management tool, facilitating effective casework with children and families whilst protecting casework staff from excessive workloads.

How did the Workload Planner come about?

As a result of proceedings in the Industrial Relations Commission in 1996/97, the Department and the PSA reached agreed to introduce a mechanism to identify what are reasonable and fair case load limits having regard to the time taken to perform the work. The Department issued a memorandum directing all CSCs to commence introduction of a workload planer in February 1998. Since then there have been several updated and amended versions of the Workload Planner. The most recent version of the Workload Planner was issued by the PSA in December 2015.

What documents do I need?

There are two main documents:

1. Time to Task Hours – this document lists the minimum estimated times for tasks commonly completed by Caseworkers.
2. Individual Workload Planner tool and Guide – the workload planning tool is the framework for calculation and negotiating the time required to undertake tasks planned for the flex period.

How do I complete a Workload Planner?

Caseworkers prepare a proposed draft of the Individual Workload Planner prior to meeting with their Manager. Managers and Caseworkers then discuss the tasks listed in the Individual Workload Planner, using the Time to Task Hours guidelines provided by the PSA. The Time to Task Hours 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.

Why should I use a Workload Planner?

The PSA does not support allocation of an arbitrary number of cases to Caseworkers. Casework staff (CWs, MCWs and MCSs) should use the Workload Planner to determine the allocation of work and not an arbitrary blanket case allocation.

The Workload Planner provides evidence of when Caseworkers reach allocation capacity. This provides protection for Caseworkers, MCWs and MCSs. It is documented evidence that local management can show District management that their Caseworkers are working to capacity.

What do I say when my Manager says that my CSC or team doesn't use Workload Planner?

The PSA has issued a direction to Members to use the Workload Planner. Members following the PSA direction are afforded individual protection by their union. This direction protects members from over-allocation of work. If your Manager will not work with you to complete the Workload Planner, contact your local PSA Delegate or the PSA on 1300 772 679.

As a temporary staff member can I use the Workload Planner without jeopardising my temporary employment?

Using the Workload Planner protects all Members – regardless of your employment status.

I work in a Practice First site and I've been told that the Workload Planner is not used as case allocation is done in group supervision. What do I do?

As not all cases are discussed in group supervision, it is still necessary for Members in Practice First sites to complete a Workload Planner for each flex period. Again, the Workload Planner provides evidence of when Caseworkers reach allocation capacity.

Can I use the Workload Planner if I'm not a PSA Member?

The Workload Planner has been developed by PSA Delegates and Members for the benefit and protection of Members and clients. Members are afforded protection by following a union direction. To receive this protection, you will need to be a Member of the PSA. Join today!

Can my Workload be used against me in performance management?

Supervision and PDP processes are distinctly separate processes from Workload Planning sessions and should not be combined. The Workload Planner protects members so you are not set up to fail through unmanageable workloads which you don't have time to complete.

Section 1: Activity Hours of the Individual Workload Planner is where planned hours which do not involve direct caseworker tasks and activities are listed. Remember to include preparation of the Workload Planner itself as one of these activities

What do I need to do to prepare my Workload Planner?

It is recommended Caseworkers update their Workload Planner prior to meeting with their Manager. This preparation should include completing Section 1: Activity Hours (being indirect casework tasks such as leave), updating the Workload Planner with new cases and recommendations about the type of casework activities which will produce the best outcome for children and families during the four week flex period. Ultimately it is your manager who, in consultation with you, will decide what matters are allocated to you within contract hours.

What if my Manager won't use the Workload Planner?

Any disputes or disagreements about using the Workload Planner or the content in the Workload Planner should be referred to your line Manager. For Caseworkers, this would usually mean escalation to your MCS.

What happens if there is a disagreement about the planned hours for an activity?

The PSA supports prompt resolution at the lowest possible level so any disagreements should be referred to your line Manager. Any activities being undertaken outside the Workload Planner and your contract hours should be dealt with as overtime in line with the Award provisions. Assistance may also be sought from the PSA.

Should negotiation fail to effectively resolve the situation, then the Caseworker should limit their caseload to a maximum of SIX cases.

After using my Workload Planner, I have excessive hours, what do I do?

The Workload Planner cannot contain activities which exceed the paid hours with the exception of the accumulation of flex time that can be accrued in a four week period.

Who uses the Workload Planner?

All staff working in casework positions are directed to use the Workload Planner. Staff in other roles (e.g. Psychologists, Casework Specialists) may also use the Workload Planner tool as a template for planning and managing their work. The Time to Tasks estimates, however has only been developed for caseworker staff.

How do I know how many hours I have for casework?

Section 2: Allocated Hours includes the agreed planned tasks and activities for each case, in line with available hours. This relates to those cases that are allocated to you. Any plan / case that you can not work on during the 4 week planning period should be unallocated from you on KiDS.

What happens if there is a significant change in my work when the 4 week period is underway?

Refer to Section 3: Unplanned Hours. This is the section where any unplanned tasks and activities completed during the period are recorded. It is important that the Workload Planner is adjusted. Ask to meet with your Manager to discuss this adjustment. If this is not feasible or cannot occur, still complete the adjustment and discuss it with your Manager when you have your next Workload Planning session. Remember the Workload Planner tool is a fluid document and is likely to have some changes during the reporting period. Keep an electronic copy of your planner on your desktop for easy access and review.

What do I say to my Casework team member if they do not elect to complete the Workload Planner and I wish to use the Workload Planner?

Using the Workload Planner provides protection and evidence of work capacity for Members. Your use of the Workload Planner will hopefully encourage others to use it.

What do I do if my Manager refuses my leave request (for leave such as flex or rec leave) based on the work in my Workload Planner not being completed?

The Workload Planner (or work not completed in the period) should not be used to decline flex leave. Flex leave has no impact on the Workload Planner. Rec leave (and similar) should be included in Section 1: Activity Hours. Unplanned leave (such as Sick Leave) should be included in the adjustments in Section 3: Unplanned Hours.

Should I keep my Workload Planners, including my old ones?

Yes! Keep both hard and soft copies of each Workload Planner you complete. Your Workload Planner is evidence of tasks and activities undertaken and planned. Any adjustments made to your Workload Planner made during the period should also be kept, as this information will also provide you with evidence of other unplanned work which you completed. You will also need to refer to it in your next planning session.

What if I haven't been able to complete all the tasks and activities in my Workload Planner eg due to additional priority work or unplanned leave?

Refer to Section 4: Tasks to be carried over to the next period. Complete this section. It is also discuss these uncompleted tasks and activities with your Manager.

What if my Manager refuses to do the case review section of my Workload Planner (as this case review may be done in group supervision)?

Given only a limited number of cases are reviewed in group supervision, it is sill important to complete Section 5: Allocated Case Review, especially for those cases not reviewed in group supervision.
Remember, take a commonsense approach when using the planner. It is there to support you with effective case planning in consultation with your Manager.