

# Topic 05 - Action Plan and end-to-end process

How to suggest other things and get the claimant to  
commit to actions

April 2017

# Action Plan



# LMS Action Plan

53. The Labour Market System (LMS) Action Plan window, example below, is divided into two:

**View Action Plan - <client name>**

File Edit Function Page Help

Detail NActitm Spell Print Save Close

**Action Item:**

This is an Example Action Item. The text will be displayed in the Action Item table as well as the free text box and any amendments will be made in the box.

Date Created	Created By	Ass	Target Date	Date Closed	Action Item
07/11/2005	A Smout	C	12/06/2005		This is an Example Act
10/03/2005	J Bradshaw	P	06/10/2005	08/10/2005	2nd example for action

**Aims** EHist PCirc Quals Info

Job Pref 1: Butcher SOC: 1111 Preferred Hours: Either Full/Part Time

Job Pref 2: Baker SOC: 1234

Job Pref 3: Candlestick Maker SOC: 1342

This box is for any additional information that has relevance to the job preferences and related data recorded. It can be amended by the user and will be saved as it appears. No other data will overwrite this and so changes are related to those made by the user rather than being overwritten by other data. Once this page is saved, it will remain as static data for the Action Plan.

Row 1 of 2

# What goes into the Action Plan

- Any actions that the claimant can take to move closer to goals that relate to work or health
- If you would like to refer the claimant to any provision, this is a good time to discuss that
- Make sure 2-3 actions are added
- The actions are **voluntary**
- The actions are focused on overcoming **external obstacles**

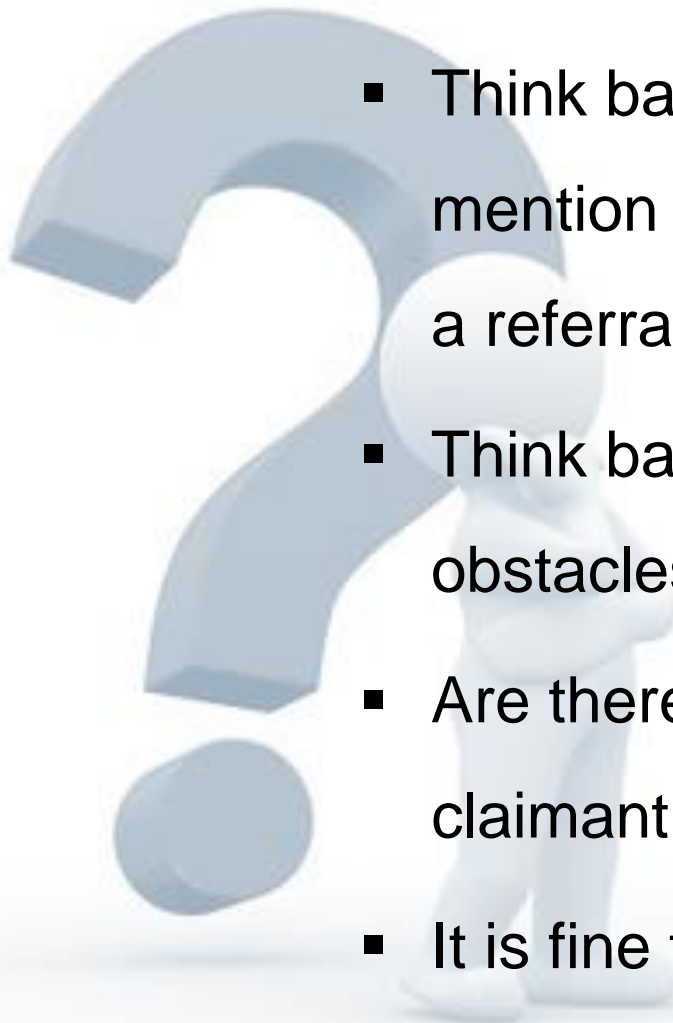
# Focus on external obstacles

Focus on **actions** that help overcome **external** obstacles

For example: training needs, housing, debt, health management, child care etc.



# Identifying external obstacles and coming up with actions

- 
- Think back to the About Me – did the claimant mention anything where they could need help or a referral?
  - Think back to the My 4 Steps – did any external obstacles come up that you could discuss now?
  - Are there any other actions that you think the claimant would benefit from?
  - It is fine to make suggestions for actions!

# How to write down the actions

- The more specific the actions are, the more likely the claimant is to carry them out.
- The actions need to be written using a specific format that mentions:
  1. **Action** (what you're going to do)
  2. **Where you're going to do it** (for example, "at home")
  3. **When you're going to do it** (for example, "this Saturday")

# Example 1

On Thursday after breakfast (**WHEN**), I will go to my friend Pete's place (**WHERE**) and spend 2 hours looking at IT courses on [www.vision2learn.com](http://www.vision2learn.com) and write down who I can call for more information (**ACTION**).





# Example 2

On Friday morning (**WHEN**) I will call at least two course providers and discuss doing partial study from home (**ACTION**). I will do this at home (**WHERE**).



# Example 3

I will call the phone number for Mind that my Work Coach gave me (**ACTION**) at 10 am on Tuesday (**WHEN**). The number is: 020 12345678. I will do this at my mum's place (**WHERE**).



Any Questions

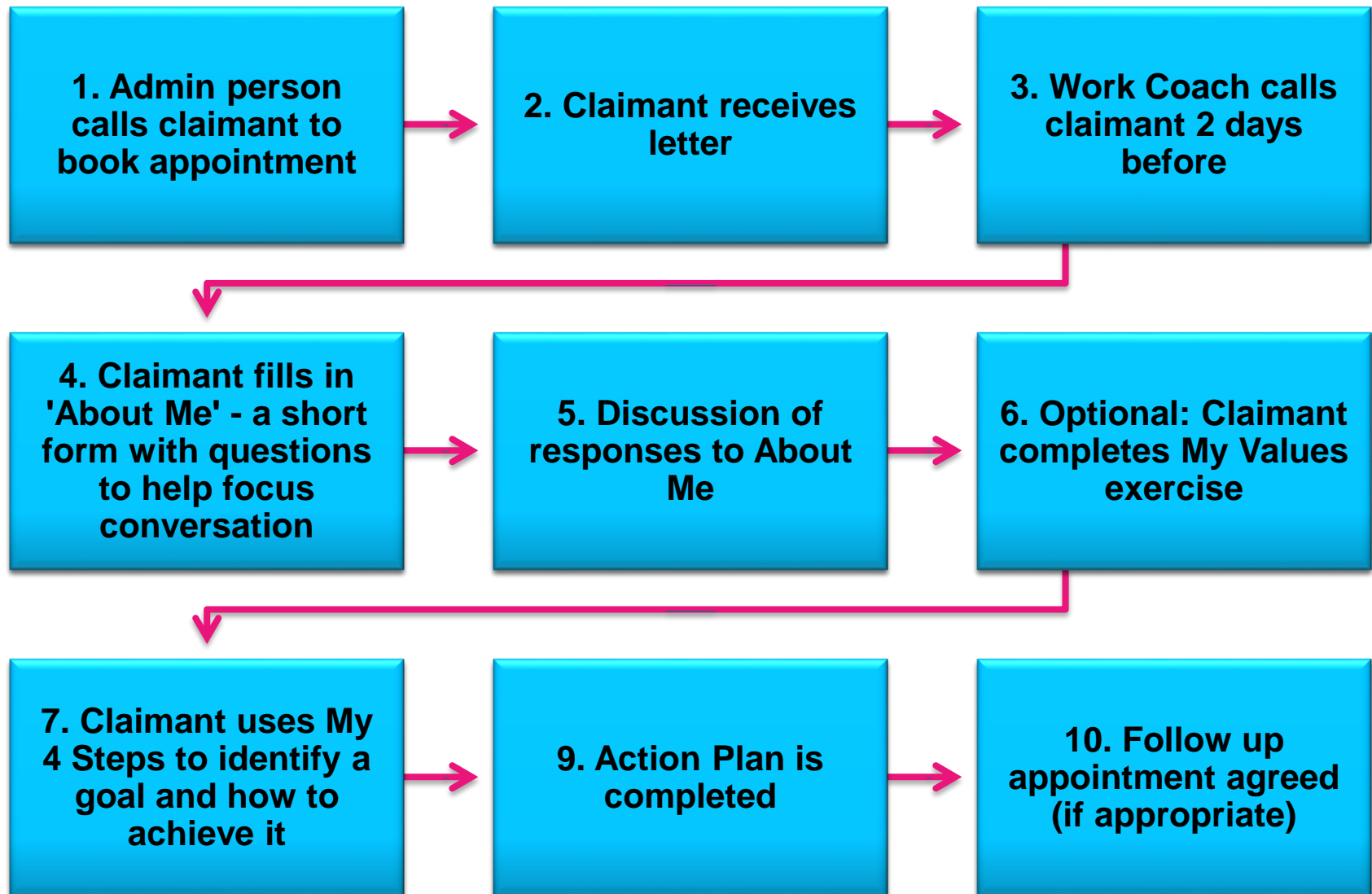


# Summary



How the Health and Work  
Conversation looks as a whole

# Full claimant journey



# Pre-call

Call the claimant 2 days before their HWC appointment.

- The aim of the call is to start building trust and rapport with the claimant
- Briefly tell the claimant about the purpose of the HWC for example “It’s to help you think about your interests and goals and how to achieve them”
- Mention this is not their WCA
- Tell them it will take less than an hour of their time
- You can use the Work Coach booklet for guidance on how to introduce the HWC
- Ask the claimant to come in 10 minutes before their appointment start time.

# Follow up

You choose what follow up activity is appropriate

Follow up appointment

Phone call

Email

Text message

Make a note of the claimant's 4 steps during the HWC so that you can ask them how it went in the follow up.

For example, you could send a text message along the lines:

*Hi Jane, hope My 4 Steps (Want Outcome Obstacle Plan) has been helpful. Look forward to hearing how it went. Tom, Tottenham JCP.*

# The do's and don'ts of the Health and Work Conversation

## Do's



1. Use your Work Coach version of the HWC booklet during each HWC.
2. Discuss the claimant's responses to About Me and My Values with them.
3. Support the claimant through My 4 Steps through active discussion of each step.
4. Encourage the claimant to come up with their own answers.

## Don'ts



1. Don't deliver the HWC without using your Work Coach booklet.
2. Don't just skip discussing the claimant's responses to About Me and My Values.
3. Don't just accept the claimant's answers to My 4 Steps without making sure each answer follows the guidelines in the Work Coach booklet.
4. Don't tell the claimant what you think their answers should be.



# Practice of the end-to-end HWC

In pairs, practice delivering the whole of the HWC.

You have about 25 minutes for each HWC practice, before changing roles.

If you're playing the part of the claimant, you should still **pick a goal and an obstacle that are genuine.**

Make sure you cover the different parts in the right order:

- 1) Welcome and introduction
- 2) About Me (use your filled-in version from earlier)
- 3) My Values (use your filled-in version)
- 4) My 4 Steps (use your filled-in version)
- 5) Action Plan
- 6) Agreeing follow up appointment



# Discussion

How was the practice?

# Support materials

- Work Coach version of the booklet
- Work Coach Reference Guide for the Health & Work Conversation
- Drilling Down for My 4 Steps document
- Frequently Asked Questions document

You will also have an opportunity to ask questions during the Lync session.

Final discussion: what have you learned from this training?

What are the key points about the Health and Work Conversation that you have taken away today?