Staff Monitoring Using IO Insight

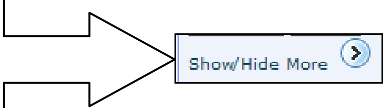
Whilst the primary function of IO Insight is to deliver a CCIS compliant client caseload tool, as managers you will also want to be able to see what information your staff are inputting on to the site and whether you are meeting your targets.
For the most part this would normally be delivered in the form of a report which you, as PA Managers, would be able to run. Because we are still developing our reporting solutions, at present there isn't one tidy report that you can run that will tell you all you need to know. However, there are a few tools in IO that are available now that you can use to monitor staff performance. These are described in the below:

Using the Lead PA Search

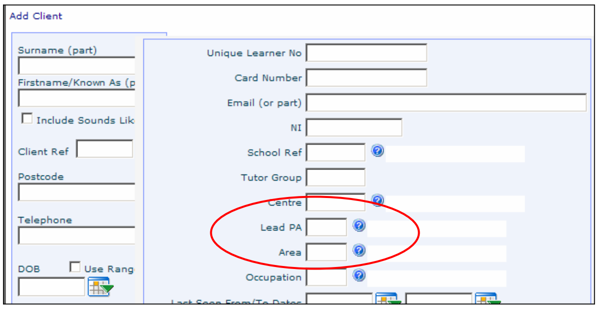
One very simple way of checking the caseload of your PA's is to run a search using the Client search screen. Anyone can run this search and what it does is to look for all the records where your PA is the named Lead PA. To use this search, open up IO Insight and click on the Clients link as below.

This will open up a screen with a search facility that appears down the left hand side of the page.
At the moment, the search criteria that appear are of more use to PA's in looking for particular client records. To get extra fields to search with, you need to use the Show / Hide More button that appears at the bottom of the search column.

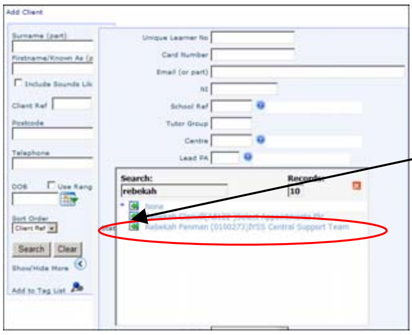
Click on the blue arrow icon to open up the full list of search criteria.



This should give you a much larger screen with a greatly increased number of search criteria.
The one you are interested in using is the Lead PA field.
Click on the blue search bubble and start typing the name of the PA that you are searching for.



You will then see the name appear in the pop up window (as shown below).



Clicking the green arrow next to the name of the PA you require will populate the search field.

If you then click Search, you will get a list of results for all the young people where your member of staff is the Lead PA.

This is a fairly 'rough and ready' way of looking at the caseload of your PA but it gives you a starting point. It will also allow you to open up those records and sample the data being inputted. Questions you need to consider are: Is the record complete or are there any bits of information missing? Is the status of the young person up to date or has it expired? Are the contacts on the History page up to date? Are Individual Circumstances being recorded? These are the sorts of things that Contract Officers will be picking up when they review your performance.

It is worth bearing in mind that the Aspire migration to IO Insight resulted in many of the Lead PA fields being overwritten by the names of Prospects members of staff. We were made aware of this and have advised PA's to contact each other where they find an unfamiliar name in the record of a young person who they thought they were Lead PA for. It will take time to recover caseloads but starting the process early and being aware of the problems allows it to be addressed sooner.

Using the Contacts Report

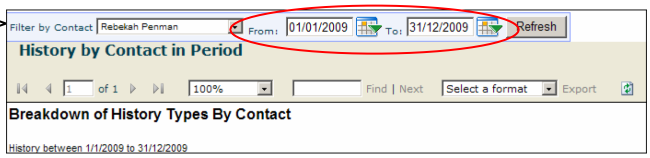
IO Insight has an inbuilt report that any user can run which will show them how many and what type of contacts have been recorded on the system during a certain period, (which the user can define). This will allow you to see how much work was recorded on the system during a certain period of time and get a feel of whether the PA is keeping up to date with their recording.

This report can be accessed by clicking on the Reports link on the main screen.

This will then open a page with a long list of reports that you can run. The one that is of interest to you is under Contacts and is called Breakdown of History by Contact Type and Category. (It is right at the bottom of the page)

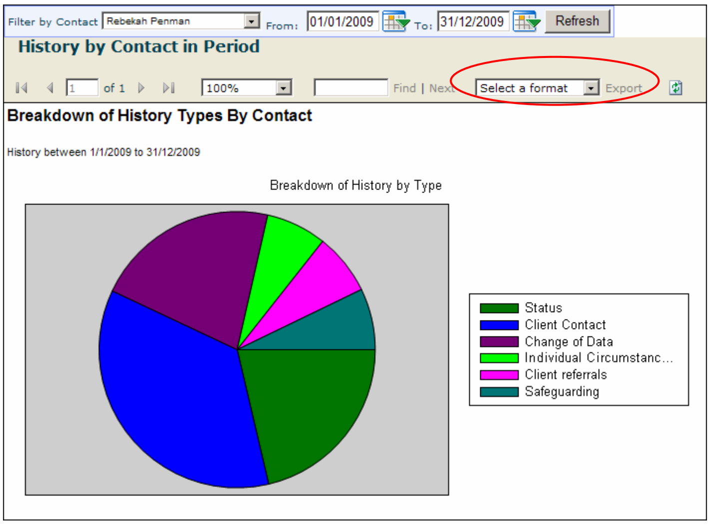
When you click on that option it gives a breakdown of contact history for yourself. In order to look at another member of staff you need to select that PA's name from the drop down list by clicking on the arrow next to your name.

Select the time period you want to look at using the from and to boxes, then click refresh.



Please note some PA's have more than one entry on the system so you may need to check both records to pull up their interactions.

This will then bring up a pie chart of the types of contact that PA has had. Underneath that chart is a list of contacts by type within the given period for that PA, as shown below.



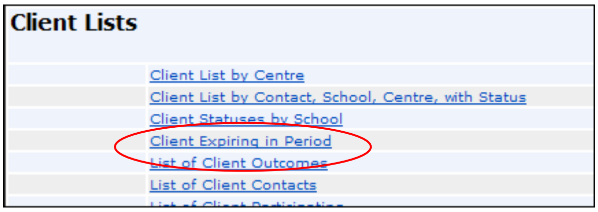
This can be used to identify if a PA is recording an adequate number of contacts within the time period for someone with their role. If you wish to save that information in a separate document you can export it to PDF or Excel by clicking on the icons in the top right (shown circled in red).

Using the Status expiry report

This report will allow you to identify the number of young people on a PA's caseload whose current status is due to expire, or whose status has already expired. It is very important that status is kept current on a young person's record; otherwise they are counted as "Not Known" in the monthly return to the DCSF. Status definitions are contained in a separate mini-guide.

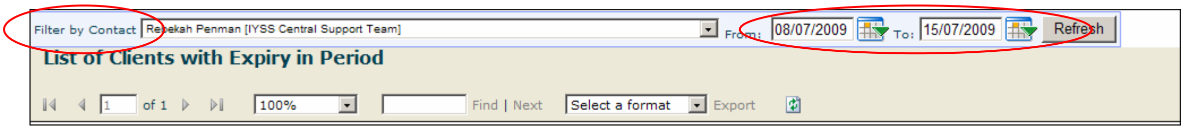
This report can be accessed by clicking on the Reports link on the main screen.

This will then open a page with a list of reports that you can run. The one that is of interest to you is under Client Lists and is called Clients expiring in period (see below in red).



Click on this link and it will give you a list of clients for all PA's.

By selecting a PA in the filter by contact box you can see which client's status is due to expire in a given period for that PA. The period looked at can be changed using the from and to dates. You can set the period in the past to see which clients status has already expired.



This will allow you to see if PA's are keeping in contact with young people and updating / verifying status appropriately. It will allow you to identify with a PA if there are issues around their ability to keep on track with their caseload or if there are issues in the recording of information they receive. It may also help to identify if PA's are losing contact with young people, and inform actions that need to be put in place.

All of these reports can be run at any time of your choosing.