**Operational guidance for practitioners – How to respond to a case discussion**

Questions for testing:

Was there any areas of the guidance that was not clear or that you require clarification for?

How did you find following the structure set out in the guidance for responding to a question?

Questions following the testing:

Did the practitioner give advice on each question i.e. not attempt to answer multiple questions with one response?

To what extent did the practitioner follow the principles when giving advice?

Did the advice suggest any decisions that the case manager should make?

Were the responses objective?

Did the practitioner provide additional information that they felt was necessary for the client and did they reference all sources of information?

**Operational guidance for case manager – How to write a case discussion question**

Questions for testing:

Was there anything in the ops guidance that wasn’t clear?

Is there anything you would want added to the ops guidance?

How useful was the practitioner response? (Did it answer the question asked?)

Questions following the testing:

Was one question asked per area or were questions asked within one area?

Did the question clearly relate to a specific area?

Did the case manager ask loaded questions?

Have they asked relevant questions having read the guidance? i.e. not asked for an opinion or benefit entitlement

**Case discussion template**

Questions for testing – Case manager:

How easy was it to add your question?

How easy was it to review the practitioner response?

Questions for testing – Practitioner:

How easy was it to review the case manager question?

How easy was it adding a response to the question?

Questions for both:

Usability and navigation – How did you find this?

Is there anything you think could be improved?

Was there anything missing that you would like included?

Following the testing:

Is it fit for purpose?

Is the template relevant to ADP and CDP?

**Time and motion**

We would like the time and motion captured for the following areas:

- Case manager reading the application form

- Case manager reading the supporting information

- Time taken to write the case discussion questions

- Practitioner reviewing the application form

- Practitioner reviewing the questions and writing a response

- Time taken for the practitioner to research before responding to the question?

- Time taken for case manager to review practitioner response and make a decision