

# Helix data language tidy up

154 activities

494 profile items

12 activities + 88 profile items already removed

<https://forms.office.com/e/gUfM75z30W>



# Referrals

Internal referral	225
External referral	695

Suggestion:

Merge together into single “referral” activity. Use activity notes to record detail if required

\*numbers = client records with that activity, not total uses of the activity

# Communications

Letter	1410
SMS sent	5073
Phone call	8028
Email received	2180
Email sent	7315
Follow up contact	2252

Suggestion: Some providers are already using a new “communication update” activity. This covers all forms and removes an expectation to each email in and out, or if a client replies to an email by texting a caseworker

# CV

Created CV	705
CV Advice	190

## Suggestion:

Merge together into single “CV advice” activity. Use activity notes to record detail. Looking at the client record shows the first iteration if there is a need to mark a first creation.

# Action plans

Action planning	1102
Action plan created	2929

## Suggestion:

Merge together into single “action plan” activity. Use activity notes to record detail. Looking at the client record shows the first iteration, when the original plan is created.

# Training

Started Employability Training	74
Started Training Course	658
Started Vocational Training	183
Completed Employability Training	46
Completed Vocational Training	123
Employability Training	1618
Progression: Vocational Training	1869

Suggestion: There are lots of “starts” which don’t have a “completed”. So removing start/completed leave just the “training course” activity. There is a separate question on the need for separation between employability and vocational. “Qualification gained” activity can be used. The relevant details can be recorded in the activity/training module

# Assessment

Initial Assessment	5109
Follow-up Assessment	812
Financial Literacy Assessment	21
Language Assessment	46
Literacy and Numeracy Assessment	38
Skills Assessment	540

Suggestion: The most common used are “initial”, “follow up” and “skills”, so as a way to tidy this up, the other 3 could be merged into “skills” assessment, to reduce the number of options here