

# ***Trainer's Notes***

## **Strategies for Prioritizing W-2 Case Management Tasks**

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### **Purpose**

This course provides FEPs/Case Managers with strategies to maximize all available time each day. Real W-2 events are used to simulate a day in the life of a W-2 worker.

### **Objectives**

Upon completion of this course, you will be able to:

- Describe how to prioritize the ongoing tasks required in W-2 case management;
- Identify multiple ways to maximize “found” time (e.g., cancelled appointments); and
- Apply strategies to maximize your time and work more effectively with customers

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**Materials**

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- White board and dry erase markers
- Flip chart paper and markers
- Crayons/Markers on tables
- Card Stock for name tents
- Course Evaluations
- Optional - Prepared flip chart versions of the calendar for the Prioritization in Practice activity, located in the Appendix of the PG, page 13
- Optional – Print Stephen Covey quotes from the PG on colored paper to hang in the classroom

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**Suggested Pace**

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This is a 3-hour course. The following agenda is the *suggested* pace.

Introduction .....	9.00 a.m.
Prioritization – Getting Started .....	9:10 a.m.
Prioritization in Practice – Part One.....	9:30 a.m.
Break.....	10:00 a.m.
Prioritization in Practice – Part Two.....	10:10 a.m.
Dealing with Unexpected Downtime.....	11:30 a.m.
Wrap Up .....	11:50 a.m.

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**Introduction**

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**Give** a brief introduction of trainers.

**Review** the purpose and objectives of the course.

**Address** “housekeeping” issues (e.g., bathrooms, vending machines, breaks) and **state** that evaluations are on the tables and can be completed as we go through our day.

**Ask** the class to introduce themselves with the following information:

- Name
- Job Position
- In what order do they complete the following after waking up in the morning: brush teeth, make the bed, and eat breakfast? (*Optional*: Tally the responses on white board or flip chart paper.)

**State** that even though we may find all of these morning tasks important, we ranked them differently based on individual preference, giving one task priority over the others. We do the same with work-related tasks; however, W-2 has policies to consider when deciding what tasks are a priority. Today we will discuss some specific prioritization strategies that can help you be more effective as a FEP/Case Manager.

## Prioritization – Getting Started

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**State** that prioritization is important because our time is limited and the demands on Case Managers can seem infinite.

**Ask** what does your work day typically look like in terms of what needs to be accomplished or what types of appointments you have?

**Note** that most of the class is doing the same thing, but your co-workers might prioritize their day differently than you do.

**Mention** that sometimes we set our priorities based on personal preference, such as what we do after waking up, but at work we need additional strategies to be more efficient.

**Add** that often, everything that you have to do seems like a priority, which makes it tough to figure out where to begin. It can be appealing to complete a task that you like or can get done quickly, even though it is not as important as other tasks. Let's review some strategies that can help you get started with prioritization.

## Know Where Your Time Goes

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**Ask** have you ever had a day go by so quickly that you didn't know where it went?

**Instruct** the class to read the paragraph and answer the question that follows in the PG.

**Ask** group to share some examples.

*Possible answers:*

- Emails
- Phone calls
- Being unorganized, including shuffling through papers or looking for something
- Socializing/chit-chat
- Social media
- Spending too much time on a task (unneeded perfectionism)

**Mention** that in Jennifer Robison's interview of Dr. Gloria Marks with the University of California – Irvine, Dr. Marks cited her study that found people interrupt themselves about 44% of the time. That means **you** are causing almost half of your distractions throughout the day.

**Ask** which of these distractions from your list do you have control over?

*Possible answers:*

- Emails – turn off the alert sound, allocate specific time to check your inbox
- Surfing the internet or spending time on social media
- Taking unneeded breaks
- Being unorganized

**State** that research by CubeSmart found that 73% of interruptions generally are handled immediately, whether or not they need to be. This means that we need to be better at identifying whether a distraction is important enough to become a priority. For instance, you may not answer the phone if you are typing Case Comments because you may lose your train of thought or have to switch screens based on the caller's needs. But, if you are scanning through emails, you may decide that answering the call is a priority.

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## Make a List

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**Ask** how many of you use a To-Do List? **Ask** how often do you update your To-Do List?

**Explain** that keeping a daily To-Do List can help you write down everything that needs to be completed, and then prioritize those tasks.

**Add** that it is important to assess the value of each task to help you prioritize them. For instance, not meeting W-2 program timelines has bigger ramifications than not doing some other tasks on your list. You could use a numbering system to assign priority, similar to the Case Manager Worker Alerts screen in CARES.

**Emphasize** that a To-Do List needs to be flexible in order to add unexpected tasks such as a participant who comes in or calls with a situation requiring immediate attention. You still need to balance providing customer service with your other priorities. This means handling important situations right away, but not dropping everything to meet with a participant who is just handing in his or her activity sheets.

**Remind** the class you probably won't get to everything on your list, especially if unexpected tasks are added that take priority. After identifying the most important tasks to complete that day and estimating how much time they will take, cut the rest from the list in order to focus on the tasks that remain. Remember, tasks that you cut from today's list may need to be added to a different day's list.

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## Effective Scheduling

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**State** keeping a schedule will help you manage your time more efficiently. You can get more done and are less likely to forget tasks or become sidetracked.

**Emphasize** the importance of allowing enough time in your schedule to complete all work related to that task or appointment. For instance, an appointment with a participant includes the time he or she is in your office and the time you spend preparing for the appointment, entering Case Comments, reviewing WWP entries, etc.

**Add** that keeping some time open in your schedule each day allows you to plan for the unexpected. This could be accomplished by keeping your first or last hour of the day open so you always have room to schedule an important appointment, respond to emails or voicemails, or take care of any tasks that took longer than you planned.

*Note to Trainer:* You may want to check with the class to see what system they use to schedule appointments. Some agencies use the scheduling system in CWW, and the next section on email calendars may not apply. The key is to make the system work effectively for them, no matter which system they are using.

**Mention** that most email programs, such as Microsoft Outlook, have calendars you can use for scheduling as well as a place to create a task list or To-Do List. Additional features can be used to set reminders or color code activities. The resources section of the PG includes some helpful tutorial websites. **Share** the following example, provided by a Case Manager, about how the calendar can be used:

*A Case Manager shared that she uses Microsoft Outlook to track all of her appointments. She includes the participant's name, type of appointment, and phone number in the subject part of*

*the appointment entry, but adds any special tasks to be completed in the comments section of the appointment entry. In order to quickly see what is happening in her day, this Case Manager takes advantage of the color coding system by assigning a different color based on a participant's placement, such as green for CSJ. She changes the color of an appointment if the participant does not show or call to indicate she needs to follow up. This system allows her to mentally prepare for the day ahead and remind her what still needs to be completed.*

**Remind** the class to be careful about putting confidential information in their calendars, especially if they are sharing the calendar with co-workers.

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### ***Pair Share***

**Instruct** the class to select a partner. Each partner should answer the following question: In what ways might you use the information we have discussed so far when you are back at the office? **Give** the partners two minutes to do this.

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### ***Prioritization in Practice Activity***

**Mention** that we will be putting the prioritization tips we just covered into practice. You will work with a partner to prioritize effectively and schedule daily case management tasks.

This activity is located in the appendices of the TN, page 9 and PG, page 10.

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## **Dealing with Unexpected Downtime**

**Say** that we often dream of having downtime at work, but when we actually get downtime, we don't know how to use it properly. (If necessary, **refer** back to the activity where a participant cancelled her appointment and how the class handled it.)

**Ask** does your agency have any expectations for how you use your downtime?

**Add** that when you feel overwhelmed, it is easy to lose focus and not make the best use of your downtime.

**Recognize** that breaks are needed to stay balanced and effective on a daily basis; however, keep in mind your agency's policies on breaks and the need to respect your co-workers' time. Not everyone in the office will be taking a break at the same time.

**Emphasize** that you do not want to become a distraction for your co-workers.

**Ask** how can you quickly overcome that overwhelmed feeling and make the best use of your downtime?

*Possible responses:*

- Re-visit your To-Do List
- Review your schedule for tasks you were unable to finish or for upcoming tasks that may need some preparation

- When finishing entries from an earlier appointment, take a step back to look at the file and make sure you remember everything that went on before entering Case Comments
- Have a standard list of quick tasks that could be completed

**Give** the class a couple minutes to answer the downtime question in the PG. **Ask** a few volunteers to share their ideas.

*Possible responses:*

- Get organized
- Plan out your future schedule
- Increase your knowledge
- Catch up or get ahead
- Tackle the tasks that always seem to get put on the back burner (**Note to trainer:** If you feel the class needs additional help identifying which tasks are higher priority, it may help to ask what they think are back burner tasks.)

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### Quick Tasks

**Direct** the class to review the list of quick tasks in the PG.

**Mention** that they can use it to identify tasks they could complete when they have 15 minutes or less of downtime, and when they have about 30 minutes of downtime.

**Optional:** If time allows, you could ask the class to check off the tasks that they think will take 15 minutes or less. Ask for volunteers to share or discuss.

**State** it may be helpful to keep this list handy as a reference when unexpected downtime occurs.

**Encourage** the class to add their own quick tasks at the bottom of the list. **Ask** for volunteers to share some of their answers.

*Possible responses:*

- Print documents you use regularly so you have them readily available for the next week or two
- Follow up on POP claims or verification needed
- Reschedule appointments that did not show
- Send out or follow up on releases, formal assessments, etc.
- Make sure you have scheduled time for upcoming eligibility reviews
- Call a worksite to check on a participant's progress

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## Wrap Up

**Instruct class** to read through the points in the PG and circle or highlight keywords that stand out to them. After a few minutes, **ask** class to shout out those keywords. **Repeat** the answers they shout out for everyone to hear and add any you feel were missed.

**Ask** do you have anything to add?

**Ask** do you have any questions?

**Remind** the class to complete the evaluations.

# Trainer Appendix



***Prioritization in Practice Activity***

**Purpose:** This activity is divided into two parts. Groups will need to use the calendar on page 13 of the PG Appendix for both parts. Although a calendar is used as a way to track this activity, the purpose is the thought process behind the decisions the groups make when creating the schedule. Do not get focused on comparing schedules, but use them as a way to ask how groups decided how much time a task needed and chose what tasks were a higher priority.

**Part One:** This part of the activity focuses on practicing effective scheduling by assigning enough time for each appointment. Groups will add appointments to their calendar for Monday, deciding for themselves how long the appointment will take. Emphasize that these are Monday's appointments and cannot be added to any other day on the calendar.

**Part Two:** This part focuses on effective scheduling while assigning priority to tasks. Groups will be faced with unexpected situations that need to be addressed. Groups will decide how to address the situations, which ones have higher priority, and where to fit them into the schedule for the week. Groups can schedule time for these tasks anywhere on the calendar, including Monday. Not every situation will require an appointment, but time still needs to be set aside to complete tasks such as Case Comments, return phone calls, etc. Groups will answer additional questions about next steps for each situation.

**Estimated Time:** Part One – 30 minutes; Break – 10 minutes; Part Two – 1 hour, 20 minutes

**Basic Directions:** Participants will work with a partner. For Part One, partners will transfer Monday's appointments to a piece of flip chart paper, or write their answers on the flip chart calendar prepared by the trainer. Partners should be prepared to share their schedule and explain the rationale for their decisions. For Part 2, the calendar does not necessarily need to be shared and the trainer can debrief each situation.

**Suggested Modifications:** Have the class use the calendar in the Appendix of the PG. Trainer creates a master calendar on a white board or flip chart paper and records everyone's answers, using a different color for each team. Or, have groups hang their calendars on the wall and the trainer can visually debrief them instead of each group presenting their own calendar.

If the class is larger, create groups of three or four instead of partners, although more time may be needed.

**Expected Results:** Each part includes a list of questions that instructs the trainer on what to look for when groups present their schedules. The trainer does not ask these questions, but pays attention to how the groups made their decisions. This helps guide discussion during the debrief questions.

## Part One – Scheduling Today's Appointments

**Directions:** **Instruct** participants to find a partner to work with, if they haven't already. **Explain** that it is Monday, and you have four different appointments today. Partners should read through each appointment description on page 10, and schedule these appointments on the calendar on page 13. It is up to the partners to decide how much time is needed for each appointment. Partners will transfer the entire calendar to a piece of flip chart paper, or write their answers on the flip chart calendar prepared by the trainer. Partners should be prepared to share their schedule and explain the rationale for their decisions. **Allow** about 10 minutes for groups to schedule their appointments, then **instruct** each group to present their schedule to the class.

Trainer should pay attention to the following aspects for each of these appointments.

### Initial Informal Assessment Appointment

- Did they allow enough time to complete the informal assessment?
- Did they allow enough time to discuss the need for a formal assessment, discuss the Formal Assessment Agreement form, and complete the referral?

### Ongoing Appointment

- Did they schedule the appointment in the afternoon, allowing for travel time?
- Did they allow enough time in case there were issues on the worksite to discuss?

### Medical Assessment Appointment

- Did they allow enough time to discuss the results and how the results affect W-2 participation?
- Did they allow enough time for changes to Carol's EP, including necessary accommodations, if needed?

### CMC Appointment

- Did they allow enough time for eligibility and placement?
- Did they try to separate the eligibility and placement into separate appointments, prolonging placement when Anna doesn't plan on volunteering?

*Note to Trainer:* We want to stay away from stating things such as, "You should always schedule one hour for eligibility appointments." When it comes to time allotted for each appointment, it may help to speak in terms of what is optimal versus what is possible. For instance it is possible to complete an eligibility appointment in 30 minutes, but is it the optimal amount of time?

### Debrief Questions

- Ask follow-up questions based on what was observed from the list above.
- Why did some groups allow more time for certain appointments?
- What other tasks regarding these appointments need to be taken into consideration (in addition to just meeting with the participant)? Did they allow time for this in the schedule? (Examples: WWP entries, CARES entries such as Case Comments; Updating screen WPCH; etc.)

## Part Two – Handling the Unexpected

**Directions:** Say that just like in real life, other situations will come up during the day that require your attention. These could be walk-ins, phone calls, emails, etc. For the second part of this activity, please refer to page 11 to see what else comes across your desk today. Partners should allocate time on their weekly calendar on page 13 to handle these unscheduled tasks, keeping in mind that some tasks may be a higher priority. This does not mean an appointment needs to be scheduled, but time still needs to be allocated for the actions regarding the task. If the task is scheduled later in the week, you will need to note any actions you still have to take today. **Explain** that they will see that the appointments and tasks already scheduled for the week greyed out on their calendar and will need to schedule around those. For all situations, partners will need to indicate the possible next steps on the case. Prior to starting, **refer** partners to page 12 in the Appendix of the PG and **review** the list of questions they need to answer. **Allow** groups about 30 minutes to complete the activity. Instead of having groups present their schedules to the class, you can **debrief** each situation by asking how they chose to handle it and what factors they took into consideration.

Trainer should pay attention to the following for each of these appointments.

### **Initial Informal Assessment Appointment** (Appointment needed)

- Did they plan for this in Part One of the activity? If not, how quickly are they scheduling her for eligibility?

### **CMC Appointment** (Appointment needed)

- The RFA was completed last Wednesday, so Anna's appointment needs to be made on Tuesday or Wednesday.

### **POP Claim**

- Was this scheduled as a higher priority than other things? Even if this is a quick action to take, were things like Case Comments, etc., entered for other situations first?

### **Auxiliary Payment**

- How quickly was this taken care of to get Tara her payment?

### **Email**

- Even though this might be easy to take care of right away, were things like Case Comments, etc., entered for other situations first?

### **Voicemails**

- Katie (Phone call should be enough, but some groups may want an appointment)
  - Were phone calls to Katie and the work site supervisor made on Monday?
- Jana
  - How timely was the message returned?
- Philip (Appointment needed)
  - Because his W-2 will end soon, was his message returned timely and an appointment made this week to discuss his options?

### **Walk-in** (Appointment needed)

- Were the immediate safety needs handled the same day?
- Was an appointment scheduled with Connie as soon as possible to update her EP? She also needs to be referred for EA or complete an application right away.

**Alert**

- The W-2 agency has 7 working days to make a determination on non-cooperation with child support. Did they call the participant or send a letter on Monday?

**Debrief Questions**

- Ask follow up questions based on what was observed. For each situation, ask how they chose to handle it and what factors they took into consideration.
  - Why did some groups rank some tasks to be completed sooner than other tasks? What were the higher priorities?
  - What steps may you need to take today, even if a task was scheduled for later in the week?
  - How did you use your downtime from the cancelled appointment?
  - Were there any tasks that you could connect the participant to someone else?  
**Remind** participants that part of prioritization is determining what you need to handle versus what could be a referral to someone else.
- What are the next steps for each of these situations?
- Which tasks were the hardest for you to handle?