Caseload Management Strategies for Care Coordination and Case Management

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The MHTTC Network uses affirming, respectful and recovery-oriented language in all activities. That language is:

INVITING TO INDIVIDUALS PARTICIPATING IN THEIR OWN JOURNEYS

STRENGTHS-BASED AND HOPEFUL

PERSON-FIRST AND FREE OF LABELS

INCLUSIVE AND ACCEPTING OF DIVERSE CULTURES, GENDERS, PERSPECTIVES, AND EXPERIENCES

NON-JUDGMENTAL AND AVOIDING ASSUMPTIONS

RESPECTFUL, CLEAR AND UNDERSTANDABLE

HEALING-CENTERED AND TRAUMA-RESPONSIVE

CONSISTENT WITH OUR ACTIONS, POLICIES, AND PRODUCTS

MHTTC Network

Central East Region 3

Delaware
District of Columbia
Maryland
Pennsylvania
Virginia
West Virginia

Central East (HHS Region 3)
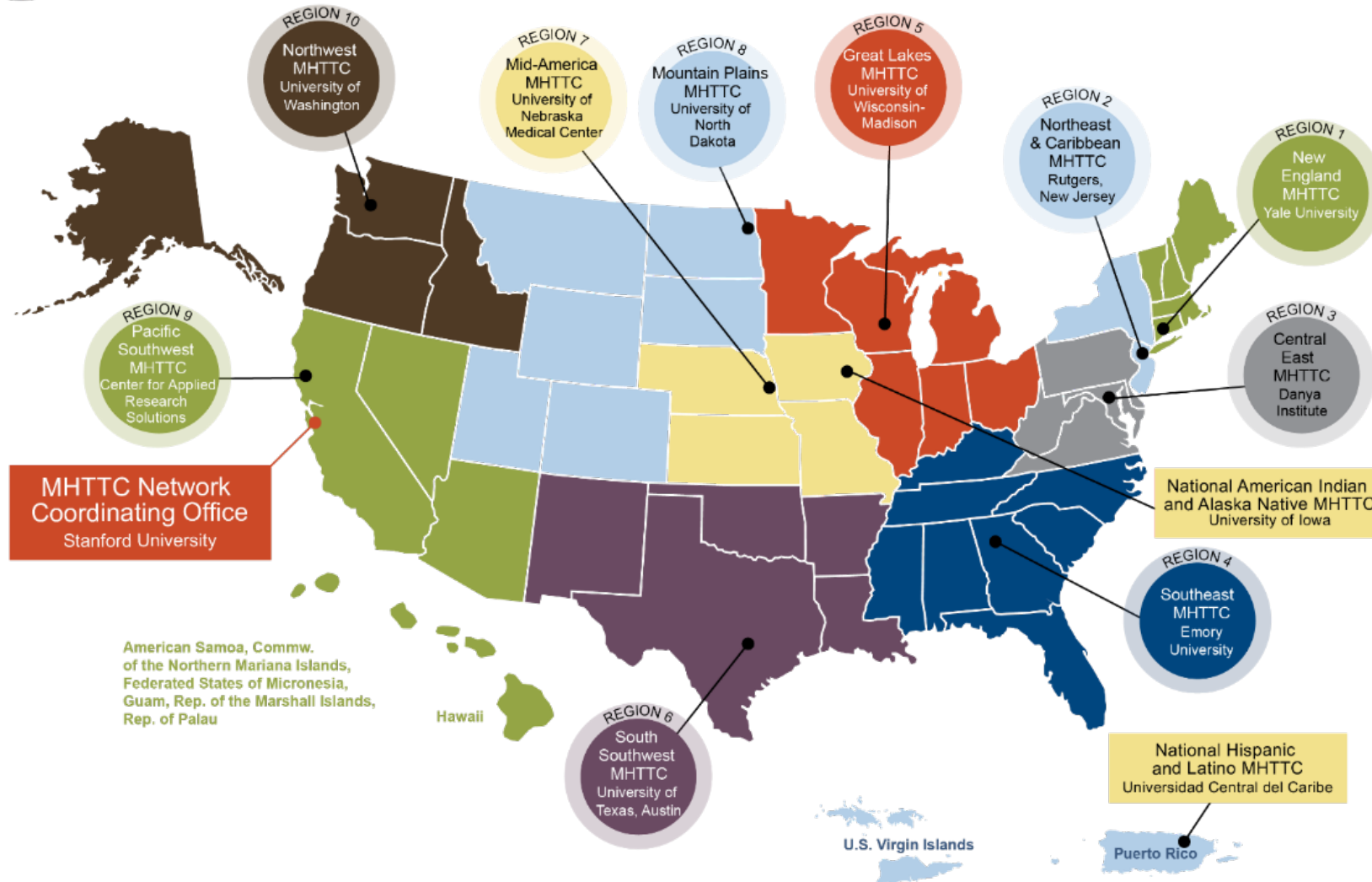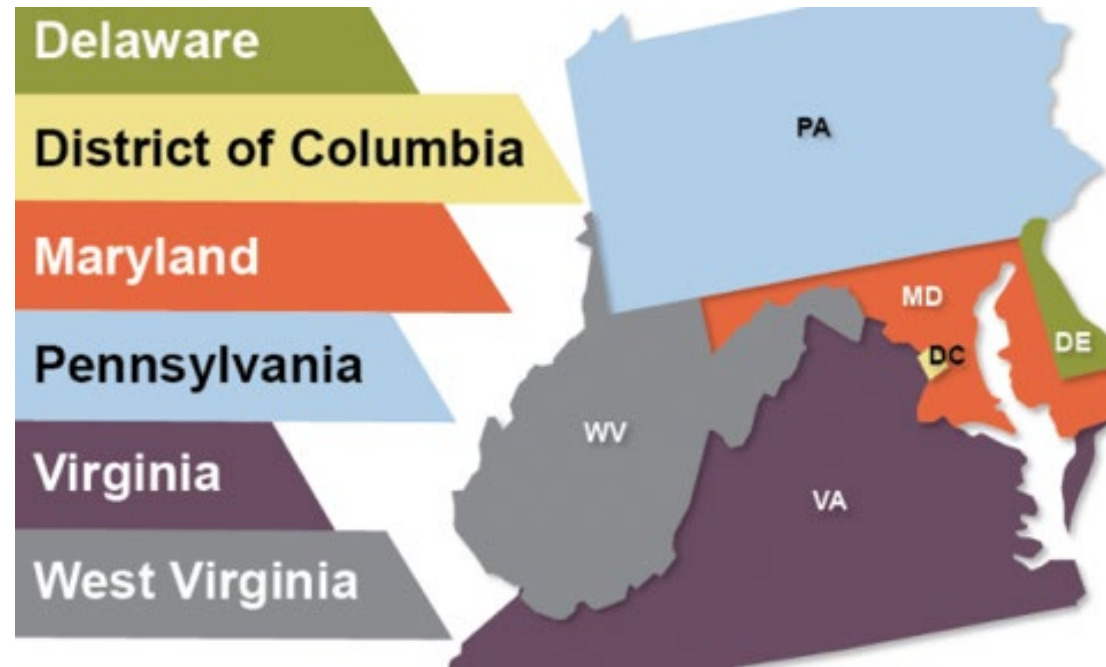
MHTTC
Mental Health Technology Transfer Center Network
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Acknowledgment

Agenda

1. Collective compassionate agreement
2. Managing a caseload—what does it take?
3. Caseload management strategies
4. Supporting your team

Our Collective Compassionate Agreement

Be present

Be brave

Step up/Step back

Be a teacher and a learner

Suspend judgment

Allow everyone to have their own experience

Take a break when needed

Pass if you don't feel comfortable sharing

Managing a Caseload—
What Does It Take?

Breakout Room (5 min.)

	What is a primary concern you notice for this case manager?
	How do you respond to this situation?
	If one person from each group could be ready to share out.

One of your case managers is in a 3-hour online training that is **required** for your program's funder. A client of theirs shows up with a **crisis**, saying they received an **eviction** notice and have 5 days to vacate their unit. Upon finding out that their client is there, your case manager **steps away** from the training and ends up working with the client for about 45 minutes. At the same time, you are reviewing case notes because your department has an **audit** next week, and you notice this case manager is **behind on case notes** by about a month.
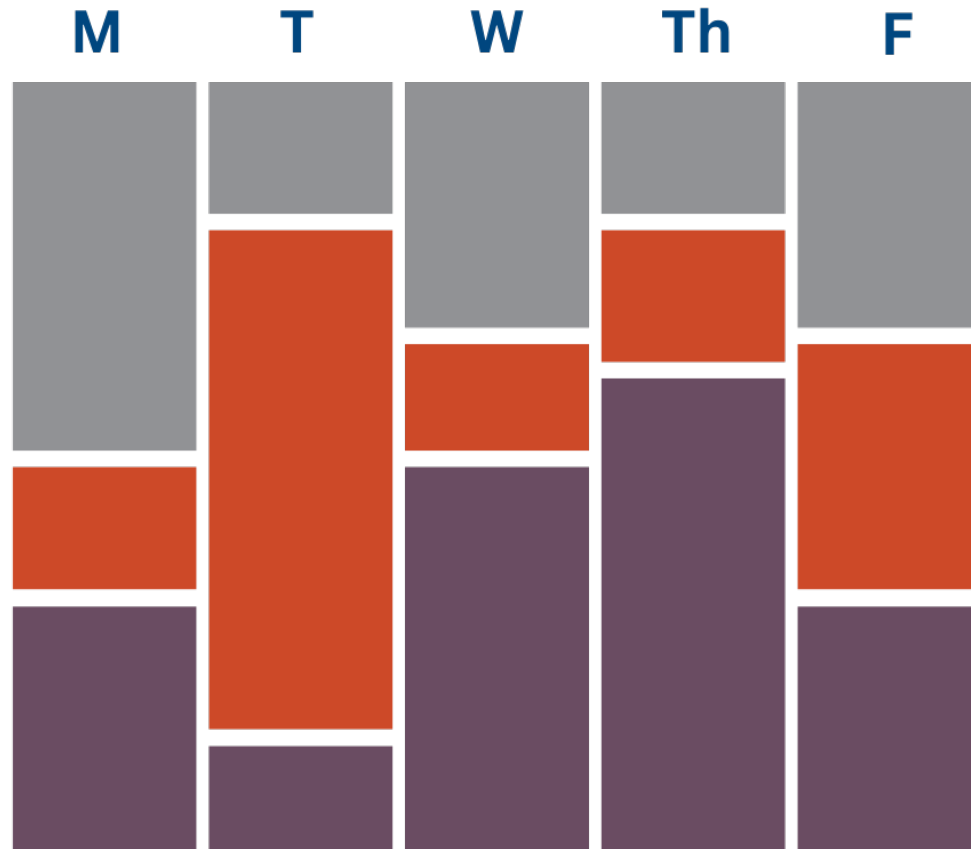
Report Out

Strategies for Managing Caseloads

Blocking Time and Creating Schedules

- Creating **to-do lists** at the start of the week or month.
- Allocating **specific time** each week for important tasks.
- Writing **case notes**, research, calls, appointments, emails.
- Building in **buffer time** between meetings.
- Self-care.

Using Technology

- Excel to manage important **deadlines** and client information.
- Calendars to track time and **schedules**.
- To-do tools to manage **tasks** and projects.

- Creating **template notes** to save time on typing.
- Using **voice-to-type** while in the field.
- Creating **folders** in your inbox to quickly and easily find certain messages.

Identifying Priorities

IDENTIFIER	URGENT	NON-URGENT
IMPORTANT	Do It First	Schedule It
NON-IMPORTANT	Ask The Team	Save It for Later

Working With Interruptions

"Our brains find it difficult to switch attention between tasks. More often than not, part of our attention stays focused on the interrupted task and does not fully switch to the interrupting demand . . . thus, we perform interrupting tasks with only part of our cognitive resources and risk performing them poorly." *(Leroy, 2016)*

- Encourage your team to honor their schedules as much as possible.
- Find out how many interruptions they experience in a day and group them.
- Practice writing a plan before leaving the original task "Ready-to-Resume."

Using a Team Approach

Set up a culture of community support

- Are there regular check-ins to hear about one another's clients?
- How often are case conferences held?
- Do team members feel they can go to one another for support?
- Is there opportunity for staff to train one another?

Boundaries for Staff

Honoring and **identifying** boundaries

- Check in with staff about staying within their job description.
- Check one another's calendars regularly.
- Remind staff to not respond to emails during hours they are not comfortable doing so.
- Remind staff when they are taking sick days/vacation to not work.
- Assure staff that they are not expected to do everything.

Micromanaging vs Managing

Listen first.

Be genuine—you are there to help, not to judge.

Remind them that they are still doing fine (unless they aren't).

Ask them to do it first and bring it to you in supervision.

Supporting Your Team

Poll

Pick one approach you'd like to try implementing.

Breakout Room (10 min.)

- Share the approach you'd like to test out.
- Why is it important to you/your team?
- What challenges do you anticipate?
- How might you troubleshoot or resolve the challenges?
- What might be the next steps to implement it?
- Brainstorm together!