

**2009 Women's Coalition Conference  
Presents:**

**Effective Case Management Training**



**Training Includes:**

**Time Management Tips  
Treatment Planning, & Progress/ Notes**

**Trainer:**

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# Time Management Tips

2009 Women's Coalition Conference

*Taken from an article by Susan Ward of ask.com*

## 1) Realize that time management is a myth.

No matter how organized we are, there are always only 24 hours in a day. Time doesn't change. All we can actually manage is ourselves and what we do with the time that we have.

## 2) Find out where you're wasting time.

Many of us are prey to time-wasters that steal time we could be using much more productively. What are your time-bandits? Do you spend too much time 'Net surfing, reading email, or making personal calls? [Tracking Daily Activities](#) explains how to track your activities so you can form an accurate picture of what you actually do, the first step to effective time management.

## 3) Create time management goals.

Remember, the focus of time management is actually changing your behaviors, not changing time. A good place to start is by eliminating your personal time-wasters. For one week, for example, set a goal that you're not going to take personal phone calls while you're working.

## 4) Implement a time management plan.

Think of this as an extension of time management tip # 3. The objective is to change your behaviors over time to achieve whatever general goal you've set for yourself, such as increasing your productivity or decreasing your stress. So you need to not only set your specific goals, but track them over time to see whether or not you're accomplishing them.

## 5) Use time management tools.

Whether it's a Day-Timer or a software program, the first step to physically managing your time is to know where it's going now and planning how you're going to spend your time in the future. A software program such as Outlook, for instance, lets you schedule events easily and can be set to remind you of events in advance, making your time management easier.

## **6) Prioritize ruthlessly.**

You should start each day with a time management session prioritizing the tasks for that day and setting your performance benchmark. If you have 20 tasks for a given day, how many of them do you truly need to accomplish? For more on daily planning and prioritizing daily tasks, [Start The Day Right With Daily Planning!](#)

## **7) Learn to ask for help, delegate and/or outsource.**

No matter how small your business is, there's no need for you to be a one-person show. For effective time management, you need to let other people carry some of the load. Work with your Supervisor in asking for, and receiving help.

## **8) Establish routines and stick to them as much as possible.**

While crises will arise, you'll be much more productive if you can follow routines most of the time.

## **9) Get in the habit of setting time limits for tasks.**

For instance, reading and answering email can consume your whole day if you let it. Instead, set a limit of one hour a day for this task and stick to it.

## **10) Be sure your systems are organized.**

Are you wasting a lot of time looking for files on your computer? Take the time to organize a file management system. Is your filing system slowing you down? Redo it, so it's organized to the point that you can quickly lay your hands on what you need.

## **11) Don't waste time waiting.**

From client meetings to dentist appointments, it's impossible to avoid waiting for someone or something. But you don't need to just sit there and twiddle your thumbs. Always take something to do with you, such as a report you need to read, a checkbook that needs to be balanced, or just a blank pad of paper that you can use to plan your next marketing campaign. Technology makes it easy to work wherever you are; your PDA and/or cell phone will help you stay connected.

You **can** be in control and accomplish what you want to accomplish - once you've come to grips with the time management myth and taken control of your time.

# Tracking Your Daily Activities

First, we need to know what you actually do each day. As business people, we all wear many hats during the day (and sometimes at night, too). But what does this mean? What tasks are we actually performing and how much time do we spend on each activity?

Tracking your daily activities lets you see where your valuable time is being spent, and gives you the data you need to set goals and make the changes to your work habits that will make you more successful.

## Daily Activity Tracking Tips

Use a device to record your daily activities that is constantly accessible to you, so you can record exactly what you do when you do it. Memory is fallible - and kind.

A Day-Timer or calendar, a PDA, an organizer software program, a digital recorder, or an ordinary notebook will all work to record your daily activities; choose whichever method you are already comfortable with and find the easiest to use.

# Clinical Case Management Treatment Planning and Progress Notes

1. Comprehensive and Ongoing Assessment is the key
2. The Master Problem List is the basis of your current and future Treatment planning
3. S.M.A.R.T. a systematic approach to Treatment Planning

## **S**pecific

Problems on the Problem List and plan **MUST** be Specific

## **M**easurable

A Plan must have MEASURABLE components

## **A**ttainable

Objectives and Means must be attainable

## **R**ealistic/**R**easonable

Be both realistic and Reasonable with directions & expectations

## **T**ime Linked

There must be clear timelines with Means to be used

1. Treatment Plan Reviews helps us to Identify and Modify
2. The Progress Notes helps us tie things together and even get credit for our work
3. Discharge Planning and the Continuum of Care: “Helping our Patients after they leave”

# Progress/ Case Management Notes



## Overview

What are Progress/ Case Notes?

Why do we have to do them?

Are there benefits to doing Progress Notes? Are there consequences for not doing Progress Notes?

## Basics

S.O.A.P/ D.A.P/ C.A.T/ DOG

Date – Time – Duration – and Event

The importance of linkages!

Good Progress/ Case Notes are like a story because they have a good: \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_.

*Scenario: You have completed an assessment on a 27 year old Caucasian female who is also homeless (currently in a DV Shelter and 28 weeks pregnant and has only been seen by the Dr. at ER. Her SO of 11 years, has assaulted her (she has lost count as to how often this has happened). Her primary Drug of choice, is opiates (heroin) and she works as a prostitute to support both her and her SO's Drug use. She reports that she has been to treatment once before but she did not complete the program. She states she left because "My Boyfriend was all alone and I missed him too much".*

(Sample Note)

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\_\_\_\_\_  
(Counselor Signature)

\_\_\_\_\_  
(Date)

**Program Participation/ Group Note**

Patient Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

(Print name)

I learned and/or relearned that:

I was surprised that:

I was saddened that:

I need to:

How does this apply to my treatment plan?

How will this apply to my recovery?

.....  
**Morning Group 9:00 – 10:00 AM 1.0 hrs**

**Morning Education/ Assignment 10:30 AM – 11:30**

Group Topic/Content \_\_\_\_\_

Group: Participation Level (with 1 being the lowest level) 1 2 3 4 5

Patient response: **bored interested excited curious insight other (explain on back)**

Education

Topic/Content \_\_\_\_\_

Education: Participation Level (with 1 being the lowest level) 1 2 3 4 5

Patient response: **bored interested excited curious insight other (explain on back)**

**Afternoon Education 1:30 – 2:30 PM**

**Afternoon Group 3:00 – 4:00 PM**

Education/Content \_\_\_\_\_

Education: Participation Level (with 1 being the lowest level) 1 2 3 4 5

Patient response: **bored interested excited curious insight other (explain on back)**

Group Topic/Content \_\_\_\_\_

Group: Participation Level (with 1 being the lowest level) 1 2 3 4 5

Patient response: **bored interested excited curious insight other (explain on back)**

Counselor Note: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Counselor Signature \_\_\_\_\_ Date \_\_\_\_\_