

BALANCING PRIORITIES & MULTIPLE TASKS

Service Coordinators have numerous tasks to complete on a daily basis and it can sometimes be a challenge to balance and prioritize what gets done first. The following provides some suggested activities for service coordinators to consider to manage the workload.

- I. **Use Multiple Lists** (*This strategy limits your think time & frees your mind*)
 - A. If you think it, ink it
 - B. Break down activities into subject categories (*there is place for everything*)
 1. project list
 2. action list
 3. waiting for list
 4. call list
 5. letters list
 - C. Establish a focus for where you should put the item & when to work on it
 - D. Review your lists daily, weekly, and/or monthly
 - E. Transfer, add, and purge on a regular basis
- II. **Prioritize**
 - A. Identify and prioritize deadline sensitive items
 1. intakes
 2. initial, annual & exit IFSP's
 3. transition
 4. implementing IFSP services
 5. 6 month reviews
 6. monthly contacts
 - B. Ask yourself, if you can only do one thing right now what will you do?
 - C. Consider time needed for each item (*using your list plan for time needed to complete each item*)
 - D. Consider your environment and how it impacts your workflow in the moment
 1. Is it quiet or noisy?
 2. Do you need it to be quiet to get your activity done?
 3. Are there resources needed to complete the activity (something you are waiting on, someone to help you with the project or task, etc.
 - E. Consider your energy level and the energy required to complete the task. Do you work best first thing in the morning when you are fresh or do you get a jump start in the afternoon?
- III. **3 Minute Rule** (*set your own minute limit...could be 2 minutes or 5 minutes depending on how much time you are willing to get off task*)
 - A. Will it take 3 minutes or less to complete the activity without breaking your work flow?
 - B. Do one of the following:
 1. Is it something you can throw away?

2. Refer or delegate it
3. Act on it (3 minutes or less)
4. File it (file based on retrieval)
5. Read it later (*start a "read it later" file to refer to when you do have more than 3 minutes to attend to it*)

IV. Phone Control

- A. Make sure your outgoing voice mail
 1. Manages callers expectations by letting them know when they will receive a return (*i.e. within 2 business days*)
 2. Request their name, call back #, what they need to know, and what the best call time is to reach them
- B. Control conversation on phone
 1. Give established time to talk or suggest time to talk later
 2. Ask close ended questions
 3. Use statements that signal end of call

V. Take a Time Out

- A. Know when you need quiet time to focus on your tasks
- B. Let others know when you are taking a time out from the chaos around you by posting a sign on your chair, cube, or door to indicate it is quiet time (*consider including the estimated time you will be available again if you are in a leadership role that requires you to frequently support others*)
- C. A time out can also be a much deserved break. Remember to take time to walk away from your desk from time to time and/or do some quiet relaxation activities at your desk to give your body and mind the mental break it needs from this very difficult job.

VI. When On the Road

- A. Schedule appointments that are close together at back to back times when possible
- B. Keep a travel binder with you that includes extra blank copies of any forms and/or materials you may need to share with a family (*i.e family rights, intake packet of information, consent forms, etc.*)
- C. Use a phone log to document your messages and bring it with you to allow you to check/document calls and/or help you make return phone calls to people if you have time in between appointments. (*Use a system to document on this log when the activity has been case noted so you don't forget to document the communication that occurred if it was done away from the computer and/or the child's permanent record.*)