Case Manager Work Week

DAILY TASKS

- **8:00**
  - Check voicemails and emails from the previous night.
  - Prepare your to-do list for the day.

- **8:30**
  - Attorney Huddle
    - Review top priorities for the day, including:
      - Demands to send.
      - Actions needed on "A" cases.
      - Questions or clients you need help with.
      - Review the 5 files you plan to call for 30-day calls.
      - Review any new cases you received the day before.

- **9:00**
  - Client Calls
    - Start with all 24-hour calls you need to make from cases assigned yesterday.
      - Complete all screens and checklists.
      - Update checklists for dates for the next call date.
      - Send all letters and documents and make your 24-hour note in your case management system.
    - 30-day client calls*
      - Complete all screens, including ordering any and all medical records, ESPECIALLY IF THE CLIENT IS FINISHED TREATING.
      - Complete checklists and then update checklists for dates for the next call date.
      - Send all letters and documents and make your 30-day note in your case management system.

- *Case Managers should set a goal for 30-day calls. For example, if they have a caseload of 100 cases and there are 20 working days in the month, they will need to call 5 clients every day. They should set a timer and work to keep these calls to 15 -20 minutes per client.*

- **11:00**
  - Respond to emails and return voicemails as needed.

- **3:00**
  - Open, scan, and file mail.
  - Respond to emails and voicemails for the day.
  - Work your checklist or to-do list in your case management system.

WEEKLY

- **Monday – Move the Needle Day**
  - **12:00**
    - Lunch
  - **1:00**
    - Work on clients at MMI. Ensure all records are ordered and that the value screen is up to date, obtain bill balances, work on subros, etc.
  - **2:00**
    - Review the fees outstanding
      - Complete any paperwork, follow up on checks that are outstanding, and request any checks needed for disbursement. Select the cases that can be deposited by Friday and make sure everything is done to ensure the client can get their funds and that the firm can pull their fees by Friday.

- **Tuesday – Increase the Average Settlement**
  - **1:00**
    - Review all records received from the previous week.
      - Look for injuries, surgeries, or things not being addressed for the client.
      - Discuss the case with the attorney if you find something in the records that the client didn't tell you.
      - Enter a med summary of the record, update the records tab if additional records are needed, and be proactive in identifying value drivers for the client.

- **Wednesday – Working for the Future!**
  - **1:00**
    - Revisit your fees outstanding. See what has come in and what we still need to do to get fees deposited this week. How close are you to hitting your goal for the week?
  - **2:00**
    - Did we get all the records in any cases at MMI? Review all files at MMI and do any tasks to help move them forward that you didn't do earlier in the week.

- **Thursday – Clean-Up Day**
  - **1:00**
    - Work on all projects that you've yet to complete for the week, including calling any clients you didn't reach from the week.

- **Friday – Disbursement Day**
  - **1:00**
    - Ensure all cases ready for deposit are deposited today. Clients are coming in for disbursements, etc.
  - **2:00**
    - Close any files that need to be closed for the week