Service Talk Shop: Non-Medical Case Management

Date: August 21, 2025

Location: Hayes Conference Room, BPHC

Build Your Toolkit Notes Summary

Time Management

- Make sure tasks are not booked back-to-back → build in extra time between activities.

- Allow 30 minutes before the end of the day to decompress.

- Prioritize important or high-energy tasks at the beginning of the day → leave less intense tasks for later.

- Dedicate focused time to one client at a time.

- Stay focused on the task at hand.

- Assign specific days for specific types of tasks.

- Use a calendar to block time for tasks.

- Set realistic goals.

- Establish boundaries around time spent with clients.

- Place limits on time spent on the phone.

Organization

- Use checklists and to-do lists to stay on track.

- Take notes and summarize the day's work.

- Maintain a color-coded calendar for clarity.

- Utilize a daily planner.

- Clean up digital files (delete or organize saved files).

- Use a consistent filing system.

- Upload calendar reminders.

- Prioritize client work based on urgency and need.

- Use spreadsheets to track tasks and progress.

- Create a structured task list (e.g., Google Tasks with set dates).

- Utilize Outlook Planner and email tabs for organization.

- Schedule paperwork separately from client-facing time.

- Organize client folders and documentation consistently.

- Maintain personal folders as needed.

- Use sticky notes as quick reminders.

- Leverage both computer and cell phone reminders for scheduling.

Self Care

- Turn off work phone outside of work hours.

- Separate work life from home life.

- Establish and maintain healthy boundaries.

- Step outside for walks during the day.

- Include physical activity as part of daily routine.

- Take lunch away from your desk.

- Ask for help when needed.

- Silence notifications outside of work hours.

- Engage in hobbies outside of work.

- Ensure regular meals (make sure you eat).

- Take breaks at work to reset.

- Get adequate sleep.

- Listen to music or podcasts for relaxation.

- Practice yoga.

- Say no when necessary → remind clients about limits (e.g., meeting or call length).

- Avoid taking work problems home.

- Dancing as an outlet for stress relief.

Quick Resources

- Websites (general references and HIV-related resources for policies, training, and conferences).

- Emailing, Google Chat, and peer support (coworkers, colleagues, boss).

- [Provider manual](#)

- Housing Navigator

- [City of Boston](#) website

- Internal guide to compile resources for quick searches based on client needs

- Hotlines (various)

- Networking and asking coworkers

- Trainings: JRI, CMTP

- Grammarly for writing support

- Co-working with another worker or agency

- [Community Servings](#)

- [Returning Citizens](#)