

## GOAL:

To work together as a unit, openly discuss Intake's workload, distribute work evenly among all officers and, redistribute work from officers with a heavier workload to officers with a lighter workload.

## ROLES:

Team Lead: to efficiently plan, organize and move work coming into Employment Standards in a timely fashion.

Manager: to be a resource to Team Lead, ensure workload is distributed reasonably among Intake Officers and, make decisions on the overall function of Intake.

## HUDDLE BOARD SET UP

- Fridays before Team Lead week, duties switch at 9:30 a.m.
- Check the calendar for when people are OOO.
  - Thursdays at 4 p.m. all time should be finalized in the Intake Coverage Calendar
- Check 'scribble space' for any notes to consider.
- Use 'Huddle Board Worksheet' to make the phone shift schedule (located: W:\LABESB\Intake).
  - Use the Intake Coverage Calendar to ensure no conflicts
  - Each officer should have equal amount of shifts
- Complete the huddle board by 4 p.m. the Friday before Team Lead week:
  - Assigned roles: current and upcoming Team Lead, Meeting Lead, Field Assigning Officer, Field Queue date, 8-4 shift
  - Phone schedule: Out of office, phone shifts, lunch and 604 coverage
  - File assignment: 'X' who is not taking claims

## HUDDLEBOARD RULES

- Team lead is in charge of the board to organize coverage and phone shifts
- No problem solving, discussions should stay on finalizing phone and coverage
- No side conversations, Officers should pay attention to the board
- When Team Lead is absent, duties revert to previous week's Team Lead

HUDDLE BOARD -- 8:30 a.m.

1. Update OOO, cross off phone shifts and who is taking claims (unexpected absences) – in red
2. Update officer claim stats (Monday to Friday):
  - a. Active: requires an action
3. Scribble space – notes indicating an issue to be addressed during huddle
4. Filling phone shifts or 604 coverage:
  - a. Officer with 5 or more active claims is removed from their phone shift. An Officer with low active claims is assigned the shift.
    - i. Manager to ask officer (during huddle) if they are ok or need a further discussion. If yes, private conversation on status of claim load. Should high active claims continue for multiple days, a private conversation will be initiated by the manager.
  - b. 604 coverage: at least 3 officers with the exception of slow times or breaks. These times will be identified during huddle and discussed.
  - c. Coverage to be pulled in this order:
    - i. Intake officers will provide primary coverage for phones and 604.
    - ii. Field officers will be asked to provide coverage where there aren't enough Intake officers to cover.
    - iii. Internal meetings (Manager's discretion only) – Where it is necessary and reasonable to do so, Intake officers will be asked to stay back from meetings as a last resort option.

## OOO PROCEDURE

Expected absences officers will:

- Update voicemail to include:
  - Dates OOO
  - Will callback upon return
  - If urgent, call GI line
- Team Lead will not check voicemails
- Officers answering calls for OOO officers on the GI line will provide the following information:
  - For active claims, EE/ER looking for an update:
    - Confirm the claim is actively being investigated (no further details on the claim are released out of respect for the officer's investigation strategy)
    - Which officer is responsible for the claim
    - Ask client: Is there something urgent? IE. a check was expected to come in
    - If nothing urgent, transfer to officer's voicemail and advise he/she will call upon their return (no need to make a CTS note – record already created with voicemail)
    - If urgent, assist the client, make a CTS note and email officer advising an action has been taken on their file.

Unexpected absences:

- Team Lead will monitor who is OOO
- The first day, Team Lead will not return the calls
- The second day (in keeping with a 24 hour standard to return a call), Team Lead will return the call and determine the need of the client. If there is nothing urgent, no action is required by Team Lead.
- This will continue until the officer returns to the office or the Manager has made another decision (eg. changing the officer’s voicemail message)

FILE TRIAGE – 9:30 a.m.

1. Collect all claims and averaging permits from inboxes (GI, 604 and general mail box) between 8:30 a.m. the business day before and 8:30 a.m. the current day.
  - a. Date stamp should reflect the calendar day the claim came in.
  - b. Bundle claims against same ER
2. Review each claim briefly; triage and action claims based on the chart below.
3. CTS search (not a full claim history, just enough to determine claim’s path):
  - a. Search EE name, ER name, address and phone number (if applicable); triage and action claims based on the chart below.
  - b. Claims for assignment to be discussed with manager.

Claim Type	Enter Claim	Team Lead-CD Required	Team Lead- Action
Closure	1 <sup>st</sup> claim only, subsequent to Admin	yes*	Give to admin
Active claim with FO	yes	yes*	Warm transfer
Protected Leave	yes	yes*	Warm transfer via Field huddle board
Active claim with Intake Officer	yes	no	Assign to Officer
Federal Claim	yes	no	Send letter/close file

\* Procedure:

- Enter claim and assign to “**ESBIntake**”
- Make initial contact by phone or email within 48 hours of ESB receiving the claim to advise:
  - ESB has received the claim and looking to gather claim details
  - Provide GI phone number (no need to identify officer name)
- File will transfer to following week’s TL should SI not be completed (pass along hardcopy)

- Complete CD within 7 days of ESB receiving the claim
  - If unsuccessful, continue with transfer to Field.

FILE ASSIGNMENT – 10:00 a.m.

1. After triage is complete, Team Lead communicates with the Manager how many claims/averaging permits need to be assigned that day.
2. Manager prints 'Employment Standards Activity – Field' report in CTS. Change dates to the beginning of the month to current date. Determine total claims for each officer
3. These considerations will be examined before each file assignment as the circumstances can change day to day:
  - a. Brandon Officer should have 5 claims above Winnipeg Officers (Brandon's in person traffic is much lower and no set GI phone shifts). Claims received electronically should go to Brandon
  - b. Vacation of 1 week or more: officer will not receive files the week before going on vacation so they can clear files. Officer will take on additional phone shifts as their workload lessens. Upon return, the officer will be given 3 claims per day until they reach the same workload as the rest of Intake.
  - c. Out of office for the entire day for any reason do not get assigned files.
  - d. Averaging Permits are considered in total 'units' (claims and permits) assigned to evenly distribute workload. Some permits can be as time consuming as a short claim investigation.
  - e. Large variations in total work loads.
  - f. Additional duties: Individual officers with additional tasks assigned to them will have had a conversation with the Manager to understand approximate time to complete.
  - g. Because of an individual conversation around workload, the Manager has approved the officer for a reprieve from new files. The officer will have identified what is occurring in their current workload that is problematic, why and how a reprieve from new files will solve the problem.
4. Assign files on a rotational basis (green magnet on huddle board marks where to start) unless one of the above considerations take priority.
5. Place assigned files in Officer's 604 mailbox.

When the Manager is absent:

Expectedly:

1. Based on considerations above, Manager will leave specific instructions (by email) to TL to follow.

2. If the officer feels there is additional information to consider, they will discuss prior to the Manager being out of the office. Otherwise, TL will follow their instructions.

Unexpectedly:

1. TL will consider A to D above and assign on rotation only.

#### TRANSFERRING TO BRANDON

- Claims received electronically should be assigned to Officer in Brandon (to avoid inter office mail delays)
- If not possible:
  - Team Lead scans the claim form and all related documents
  - Emails to Officer
  - Officer creates hardcopy file

#### ENTER NEW CLAIM AND GATHER CLAIM DETAILS

1. Within 48 hours, claim will be entered in CTS and contact by phone or email with EE to advise:
  - a. ESB has received the claim
  - b. Identify the investigating officer
  - c. Will be in touch to gather further claim details
2. Complete claim details within 7 days of receiving the claim