

Ep #9: How to Get Your Charting and Planning Done at Work



Full Episode Transcript

With Your Host

Heather Branscombe

Ep #9: How to Get Your Charting and Planning Done at Work

Episode nine, How to Get Your Charting and Planning Done at Work.

Welcome to *Clinicians Creating Impact*, a show for physical therapists, occupational therapists, and speech-language pathologists looking to take the next step in their careers and make a real difference in the lives of their clients. If you're looking to improve the lives of neurodiverse children and families with neurological-based challenges, grow your own business, or simply show up to help clients, this is the show for you.

I'm Heather Branscombe, Therapist, Certified Coach, Clinical Director, and Owner of Abilities Neurological Rehabilitation. I have over 25 years of experience in both the public and private sectors, and I'm here to help you become the therapist you want to be, supporting people to work towards their dreams and live their best lives. You ready to dive in? Let's go.

Hello, friend. This week I'm getting ready for a little mini-vacation with my family to a local ski resort and I am so excited. I have three children and two of them have moved out and are actually living together. So it's always fun when we're able to get back together and spend time doing fun things and reconnecting. I think this is one of my most favorite times and eras of being a parent because my role has gone from what I decided had been the rule enforcer to more of a mentor and a guide and it feels so much more fun.

I don't know about you, but one thing I notice is whenever I'm planning some vacation, the time directly before my vacation, especially at work, feels a little more hectic. I think it's because I'm asking my brain to decide more of what is important to me to do before I leave and what can wait until I get back?

Now, on one level, prioritizing work is something that I'm always doing, and I know you probably do that as well. But somehow delaying work, even for a few more days than I normally would, kind of lights up the primitive part of my brain. Aren't brains funny?

So I thought I'd take some time today to share some tips and some tricks about what I know about the brain, some common thought patterns we have about work, especially as clinicians, and what we can do about it. I also know that working with some of the most amazing team members that I do, one challenge

Ep #9: How to Get Your Charting and Planning Done at Work

that comes up frequently is how to get charting and planning done at work during your normal work hours.

Now, I get it, charting or any kind of documentation has never been my favorite thing to do at work. I even remember one day very early in my career, I think even in my first year, I remember getting up at 5 am to go into work at 6 am to finally catch up on what I had decided was a priority to do for charting and report writing before my regular work day that started at 10 am.

I remember my boss at the time being concerned, not so much that the reports hadn't been done, but that I had come in so early. And I have totally struggled with this concept over time. I share this just to say that this kind of work is not why I became a clinician. And I suspect planning and charting or documentation, whatever you call it, might not be why you got into this work as well.

So, what can we do? I wanted to share my planning tool today to show how I plan my week and show you how it can apply to you, no matter where you work or what kind of work you do, be it more or less clinical, to get it all done in your work time.

Now, if you're driving or doing something else today while you're doing the podcast, listening to this, but want to have a written copy, you can get a free PDF version of this plan on our Abilities website on the clinician corner web page. So don't feel like you have to take a lot of notes, but let's go through the plan.

So step one, my step one is I actually schedule a time to plan my week during my work time. And I know there's many of you who are going to say I don't have time to plan in your week. I'm here to tell you by living on both sides of that truth that there is time for you to plan. And I just want to offer you the time that you put into planning your week will reap so many more benefits to you for this week.

So, if you really don't believe that you can make that planning time in the week, then I would offer, you get to decide whether that's an investment that you want to do before your work week or maybe at the end of the work week. It doesn't necessarily have to be at the beginning of your work week, but make some time

Ep #9: How to Get Your Charting and Planning Done at Work

in your week even if it's off work time. And I guarantee you that you will get such a return on your investment that it will show you how much it is worthwhile.

So, I like to choose a weekly time to plan. It's usually the same day and time for me, although I will sometimes move it if I need to do it. I definitely make sure that I remove all the distractions. So I turn off my phone, I turn off my email, I make sure that I'm in a place that's really quiet. And then I choose to use a digital calendar, but you can choose an analog calendar. Decide which is your favorite calendar, pull it out and get ready to go.

Step two is to schedule your personal and free time. Notice how we did that first? It's really important, especially if you're in private practice, but even if you're in a more public practice, to make a very clear delineation between work time and free time. You really want to show where you want to get your work done, so putting in your mind where that delineation is, is really important.

Step three is you're going to schedule your meals and your travel time. So if you have some break times that you're supposed to have in your work, this is when you get to decide when is best to put those times in. You really want to give yourself time to travel safely and to take a lunch, if that's the kind of time of work. Whatever your mealtimes are, you want to make sure that you have those meals, if that is normally part of your work day.

Then next is step four, which is scheduling your meetings and appointments. So all of your person facing meetings go here. So any of your client sessions that you have, any meetings with any colleagues, team meetings. Any other meetings that you're meeting with another person are going to go there first. And again, you want to make sure that those work meetings are going into your work time. So those are kind of your big rocks. You're going to make sure that those meetings and appointments are in there first.

Then step five is you're going to schedule some focus time. So this is where all the non-person facing tasks go here. You're going to choose a block of time, ideally when you are normally more focused. And that's where that time is going to be for charting and for planning. Now notice, obviously, when we schedule a

Ep #9: How to Get Your Charting and Planning Done at Work

lot of client appointments, we are very flexible in our time. Notice, this is where we typically fall down.

Even if we're having a hard day, we generally don't blow off meetings with other people. But I guarantee you that if you're going to blow off a meeting, you're going to blow off a meeting with yourself. That is that focus time. So think about a time in your ideal world where you would be normally more focused and decide in advance how much time do you want to allocate to charting, or do you have for charting? And how much time do you want to allocate for planning or that you want to have for planning? And book that in as well.

And then step six is you want to schedule some unexpected urgency time, because I know you're probably saying this to the podcast out loud to me, if not thinking it, but Heather things change. Client appointments change. Different needs change. And yes, as a service-based industry, we are not ever fully in control of our schedule.

But as you put in some unexpected urgency time, and you get to decide how much or how little that is, that will give you the buffer to put those unexpected things, those unexpected reports that come up, that unexpected phone call that you feel like you need to make, the unexpected emails that have come in in a flurry that you feel like you need to do, or some unexpected charting that is taking longer. This is where you can put some of that in.

So as you've gone to step six, then you're probably going to have a very full schedule. And if you haven't put in everything that you need to put in for that day, that's okay, but this is where you get to prioritize. We're like a goldfish in a goldfish bowl and I want to offer you that we will do all the work that we need to do to get it done, no matter how big or how small that it is. So this is where you get to make those challenging decisions, what is most important for you in your role? And how can you prioritize that?

So step seven sounds easy. It says now your only work is to follow the plan. And while that sounds very simple, not necessarily easy, it actually isn't very easy because as you put a plan in place, and we're doing that ahead of time using our prefrontal cortex or the higher part of our brain, and prioritizing in advance.

Ep #9: How to Get Your Charting and Planning Done at Work

As you're actually executing that plan, your more primitive part of your brain, that part of the brain that wants things to be safe, comfortable and easy, is going to freak out every once in a while or it's going to light up a little bit. It's going to say, "There's no way that I can do this charting this quickly. I'm too tired to do planning this day. I just need a break. I just need a relief."

And again, all of those thoughts and feelings are just an opportunity for you to connect with yourself, kind of like a check engine light, and decide if they're true or if they're not true, and what you want to do about it. This is ultimately where your commitment to yourself comes in.

And if you want to learn more about commitment, you can listen to more about that in episode eight of the podcast, How to Actually Get Your Goal, where I talk about the importance of commitment. When you don't follow your plan at the moment, you can choose to see it as an opportunity to learn about you and about your job.

Were you realistic and how long things would take? Were you realistic and how much you could do in a given period of time? And my favorite question to ask myself is, how could I make things simpler, easier or quicker? What other resources do I have to help? And am I using them to their full potential?

So these are questions that I'm asking myself a lot this year. My hours of work have varied widely over the years. And over the period of time that I have founded and grown Abilities there has been a wide variety of hours that I've worked.

So in a business where I have total control over the hours that I work, I have worked anywhere from more than 50 hours, six days a week to 25 hours a week. And all of those decisions have been on purpose for extended periods of time. And I've really liked my reasons for them.

I'm now in a phase where I am going from working more hours on purpose to purposely looking to decrease my hours, and so it's bringing up a whole lot of mind drama for my brain. My brain wants to tell me that I can't do it because I need to be there for everybody all the time. When in reality, that's not true. I'm

Ep #9: How to Get Your Charting and Planning Done at Work

actually not available 24 hours a day right now. And I really do like that decision, and I think my team does too.

So any other decision I make on how available I am or am not is completely up to me. I do believe that there's a way that I can work the way that I want to, be completely available to my team, and work less than what I am right now. And I am in active experimental mode on how to make that happen. I'm actually doing that, also, while happily starting new projects I love, like this podcast.

While I don't exactly know how I'm going to do this just yet, I am using this exact same process to guide me as I figure it out. So now I'm curious, what's worked for you at work to get it all done? Or what hasn't worked? I'd love to hear how this process works for you and the challenges you have along the way.

The easiest way to do that is to follow me on Instagram, @HeatherBranscomb, all one word, .coaching. And just a reminder, you can download the PDF version of this process absolutely for free on our Abilities website on the clinician corner page. Thanks for listening today and I can't wait to see the impact that you create with this. See you soon.

Thanks for joining me this week on the *Clinicians Creating Impact* podcast. Want to learn more about the work I'm doing with Abilities Rehabilitation? Head on over to abilitiesrehabilitation.com. See you next week.