

# How to Use the APS Workload Tool

## Overview

The tool is an Excel file consisting of three parts, each on a separate worksheet/tab:

1. **UNDERSTAND Workflow** – This tool provides a beginning framework to understand the steps in your workflow process. Better understanding of workflow will result in better projections of workload needs and management.
2. **PROJECT the Number of Needed FTEs** – This tool provides metrics and instructions for estimating the number of needed FTEs for caseworker position(s).
3. **MANAGE Workload** – This tool provides concepts and metrics for managing — assessing, monitoring, adjusting — workload of casework staff. Some of the data, particularly the metrics in the caseload/caseload section of the tool, is used to project the number of needed FTEs.

The APS Workload Tool Instructions explain how to use the tool. The APS Workload Tool Final Report to ACL provides additional background information and detail from the needs assessment used to develop the tool. The APS TARC presented a webinar with an overview of the tool, which is available on the [APS TARC YouTube](#) channel. The webinar contextualizes the information but does not contain the same level of detail as the instructions.

## Tips for “UNDERSTAND Workflow”

Understanding process is necessary to determine needed FTEs and manage workload. Modify the tool as needed for program-specific activities, different types of cases, and types of staff. Answer the questions that most meet your needs. Involve a diverse cross-section of staff in the process. Use the process as an opportunity to consider not just “as is” process but also “should be.”

## Tips for “PROJECT the Number of Needed FTEs”

Follow the steps in order. You will need accurate historical data to accurately project future needed FTEs. Pay attention to the definitions and calculation methods; your terminology or information source may be different than outlined. Your program may not use a vacancy rate nor calculate support positions based on the number of caseworkers, in which case you do not need to do steps 2 or 3.

## Tips for “MANAGE Workload”

Workload is multifactorial; therefore, one metric will never rule them all. Measure and monitor as many of the factors as you can, ideally using a dashboard in real time. Data helps you ask the right questions to understand workload; it may not answer them. Use the data to understand the relationships between process and factors in your program. Measure over time and across organizational entities — workers, units, regions — to determine performance targets/parameters. Incorporate metrics for managing workload into management systems and processes.

Please [contact the APS TARC](#) if you have questions or need assistance.