

Scheduler's Client List:

We deal with people from all walks of life with different preferences, allergies, and needs. As the business grows and you incur more people it is helpful to have a system to keep track of those needs.

Clients and caregivers have preferences on who they can work with. The client list is a useful tool not only for the scheduler, but office staff as well. It is useful to create the client list on an excel spreadsheet and save it as an excel document. When saved, and created through excel it allows you to go back and make any changes necessary.

What the Client List includes:

The client list has components of the client, client's number, available caregivers, caregiver's number, and a do not call list. Client's column should include if they smoke, have pets (if so what type), only allow male or female caregivers, if client has a lift, keypads, notes on condition, etcetera. Next to the client's column should have the client's phone number. Available caregiver column are caregivers that are good candidates for the client or worked with the client before. Next column will be the available caregiver's number. Last column includes caregivers that cannot go to a client's house whether it is due to allergy, client or caregiver were not a match for one another. (view example below)

Updating:

It is helpful to keep the client list updated as regularly as possible. Then if there are any changes made throughout the week send it out weekly. The client list should be sent out to everyone in office including the Afterhours Personnel. This helps everyone, especially at times someone needs to fill in for the scheduler.

Example:

CLIENT	CLIENT	AVAILABLE	CAREGIVER	DO NOT CALL	Updated report
	PHONE #	CAREGIVERS	PHONE #	LIST	(Date) @ (Time)
Lizzy Jacobs	***_***_****	Kaley Moore	***_***_****	Riley Down	
Female caregivers only		Laurey Light	***_***_****	Sydney Doe	
hoyer lift		Janet Snow	***_***_****	Mary Louis	
		Autumn Doyle	***_***_****	Layla Low	
		Lillith Flower	***_***_****		