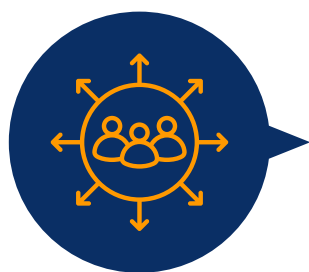


CORE PROCESS

Scheduling & Shift Management

PURPOSE

To ensure clients receive the right care at the right time by building and maintaining accurate schedules, matching caregiver availability and skills to client needs, and responding quickly to changes and call-outs.



01

VISIT & STAFFING REQUIREMENTS CAPTURE

Owner: Scheduler / Case Manager

- Review active care plans to understand visit frequency, duration, and required skills.
- Confirm start dates, preferred days/times, and any family or client constraints.
- Log visit requirements and staffing needs in the scheduling system.
- Flag complex or high-risk cases that may require backup coverage or special assignment.



02

CAREGIVER AVAILABILITY & PREFERENCES MANAGEMENT

Owner: Recruiter / Hiring Manager

- Maintain up-to-date caregiver availability, including standard hours, preferred shifts, and blackout times.
- Record each caregiver's skills, credentials, and geographic coverage area.
- Update availability promptly after PTO approvals, schedule changes, and status updates.
- Identify coverage gaps by comparing open visits against current caregiver availability.



03

SCHEDULE CREATION & SHIFT ASSIGNMENT

Owner: Scheduler / Staffing Coordinator

- Build client schedules that align visit requirements with caregiver availability and qualifications.
- Assign primary and, when appropriate, backup caregivers to each client.
- Avoid overloading caregivers with excessive travel, overtime, or fragmented shifts.
- Review schedules with program or clinical leads when needed before finalizing.



04

SCHEDULE COMMUNICATION TO CAREGIVERS & CLIENTS

Owner: Scheduler / Program Coordinator

- Publish finalized schedules to caregivers via app, portal, or printed schedule.
- Confirm that caregivers understand their assigned shifts, locations, and any special instructions.
- Notify clients and families of initial schedules and any significant changes.
- Document schedule confirmations or questions that require follow-up.



05

SAME-DAY CHANGES, CALL-OUTS & COVERAGE

Owner: Scheduler / On-Call Supervisor

- Receive and log caregiver call-outs, delays, or no-shows.
- Assess impact on client coverage and identify at-risk visits.
- Contact alternate caregivers based on proximity, skills, and hours limits.
- Update the schedule in real time and communicate changes to caregivers, clients, and supervisors.



06

VISIT CONFIRMATION & ATTENDANCE TRACKING

Owner: Scheduler / Operations Lead

- Monitor check-ins, check-outs, and visit completion data from the caregiver app or timekeeping system.
- Verify that scheduled visits occurred as planned and investigate discrepancies.
- Track patterns of missed, shortened, or late visits and escalate repeat issues.
- Document reasons for missed or modified visits for billing, compliance, and service recovery.



07

EXCEPTION HANDLING & MAKE-UP VISITS

Owner: Scheduler / Case Manager

- Identify missed or incomplete visits that require make-up based on payer and program rules.
- Coordinate with caregivers and clients to reschedule within allowed time frames.
- Update the schedule and communicate new visit times clearly to all parties.
- Document make-up visit decisions and outcomes in the scheduling or clinical system.



08

SCHEDULE REVIEW & OPTIMIZATION

Owner: Operations Manager / Scheduler

- Review weekly and monthly schedule performance (coverage rates, overtime, travel inefficiencies).
- Identify recurring problem areas such as chronically hard-to-cover shifts or frequent call-outs.
- Adjust caregiver assignments, geographic clustering, or shift patterns to improve stability.
- Collaborate with recruiting and intake teams to communicate staffing needs driven by schedule trends.