



Helping Enterprises in Their Digital Growth

# Scheduler Training document

## **Kleza Solutions**

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## Training Timeline

Fundamental Training - 2-3 Weeks

Practical Training – 2 weeks

## Summary of the topics covered in the training

| Topics                                   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Introduction and Workplace Basics        | <ol style="list-style-type: none"> <li>1. Basic interaction about our clients (In-Home Care Agencies) and workplace.</li> <li>2. Regular scheduling shift and on-call shift hours</li> <li>3. How to collaborate effectively in a team.</li> <li>4. Guidelines for maintaining professionalism and integrity</li> </ol>                                                                                                                                                                                                                                                                                                                                   |
| Overview of Home Care Company Operations | <ol style="list-style-type: none"> <li>1. 1. Interacting/how to communicate with clients and caregivers</li> <li>2. Understanding and executing administrative duties.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Types of scheduling                      | <ol style="list-style-type: none"> <li>1. How do we plan a schedule for a New Client</li> <li>2. How do we plan a 24-hour care</li> <li>3. How do we plan Hospice care</li> <li>4. How do we plan Couples Care</li> <li>5. How do we plan a recurring shift Calendar for a client</li> <li>6. How do we add new Care/Shift for already Existing Clients</li> <li>7. How do we plan Emergency Cancellations</li> <li>8. How do we change the shift timings upon request from client or Caregiver</li> <li>9. How will you plan, if client tested Covid + and If Caregiver tested Covid +</li> <li>10. Planning a schedule for returning Client?</li> </ol> |
| Caregiver Cancellation                   | <ol style="list-style-type: none"> <li>1. Less than 6 hours</li> <li>2. More than 6 hours</li> <li>3. If Caregiver is sick before coming to shift</li> <li>4. If caregiver tested Covid+</li> <li>5. Sick during shift</li> <li>6. Caregiver Car problem</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                       |

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|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Client Cancellation            | <ol style="list-style-type: none"> <li>1. Sick before shift</li> <li>2. Client visiting or going out for dinner</li> <li>3. Admitted in hospital</li> <li>4. If the client is tested covid +<br/>If the client is upset with the Caregiver or not happy with the care.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Types of calls from Caregivers | <ol style="list-style-type: none"> <li>1. Caregiver asking permission to leave early</li> <li>2. Caregiver calling in for Clock in and Clock out</li> <li>3. Caregiver calling and informing that running late to their shift</li> <li>4. Caregiver calling for Re-scheduling</li> <li>5. Caregiver calling for available shifts</li> <li>6. Caregiver calling and informing that she is not feeling well during her shift</li> <li>7. Caregiver reporting issues/concerns on client and another caregiver.</li> <li>8. Caregiver calling and informing that they don't want to work with the client nor happy to work during the shift and after the shift</li> <li>9. Caregiver calling and requesting leave or off</li> <li>10. Caregiver calling and asking for client's location</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                             |
| Types of calls from Clients    | <ol style="list-style-type: none"> <li>1. Client calling us and informing about change in care plan</li> <li>2. Client calling for Re-scheduling</li> <li>3. Client calling for cancellation</li> <li>4. Client calling for caregiver off the shift (Client don't like the caregiver)</li> <li>5. Client having concerns with the caregiver</li> <li>6. Client calling and informing to add some rules for the caregivers during the shift</li> <li>7. Client calling for their shift calendar</li> <li>8. Client calling for information about their shift</li> <li>9. Client's family calling and informing the client have passed away</li> <li>10. Client calling for adding new shift</li> <li>11. Client calling and informing to stop their care from agency</li> <li>12. Clients calling and refer their family and friends for care</li> <li>13. New client calling and asking information about home care Services</li> <li>14. Clients calling in for the Billing amount</li> <li>15. Clients calling and informing about the change of address</li> <li>16. Clients calling and informing they have doctor's appointment and requesting caregivers to take them there</li> </ol> |

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Different Case Scenarios  
with live examples

1. This includes Client and Caregiver Scenarios
2. How to interact with clients and caregivers regarding their schedules and addressing any concerns they have.
3. How to interact with caregivers with the questions they ask and with the concerns they have
4. How to handle extreme situations between client and caregiver.
5. What kind of responses /answers should be given to the questions the client/caregiver asks.

## Wellsky Training

|                                                                                              |
|----------------------------------------------------------------------------------------------|
| <b>Dash board</b>                                                                            |
| Explain dash board                                                                           |
| Use of live view                                                                             |
| How do we manually do clock ins and clock outs                                               |
| What are care alerts                                                                         |
| <b>Clients page:</b>                                                                         |
| Explain daily care logs                                                                      |
| Where and when do we add the important information about the client ( client specifications) |
| Creating a shift ( open, recurring)                                                          |
| Where and in what cases do we add a note                                                     |
| Explain activity page                                                                        |
| <b>Caregiver and care finder pages:</b>                                                      |
| Explain care givers page                                                                     |
| Adding unavailability for a shift                                                            |
| How do we find a caregiver                                                                   |
| Open shift - assigning caregiver                                                             |
| Care giver cancellation                                                                      |
| Care giver calls and asks for open shifts                                                    |
| <b>Reports page:</b>                                                                         |
| How do we generate standard reports                                                          |
| Use of generating reports                                                                    |

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