

Scheduling checklist

Date: _____

Section	Checklist item	Completed? (Yes/No/In Progress)	Owner	Notes
Data & Compliance	Store all client/caregiver schedules in HIPAA-compliant system			
	Restrict access based on user roles/permissions			
	Mandate secure login for scheduling users			
	Back up schedule data			
	Enable audit trail for schedule changes			
Centralize Your Scheduling	Maintain single source of truth for all active schedules			
	Eliminate duplicate schedule versions across files or tools			
	Update all schedule changes in one centralized system			
	Document and follow version control process			
Caregiver Availability & Matching	Track caregiver availability in real time			
	Match caregivers based on skills and certifications			
	Reference client care needs during scheduling			
	Prevent scheduling outside authorized hours			
	Build compliance rules into scheduling process			
	Implement process to fill last-minute call-offs quickly			
	Send automated notifications for schedule changes			
	Identify backup/float caregivers for coverage			
Communication & Visibility	Define escalation process for urgent coverage gaps			
	Give caregivers secure access to schedules			
	Send accurate, updated visit schedules to clients			
	Instantly communicate schedule changes			
	Track and review missed shifts			
Reporting & Optimization	Enable "read" confirmations			
	Generate reports for open shifts and gaps			
	Review recurring staffing trends (monthly)			
	Monitor caregiver workload to reduce burnout risk			
	Track and analyze overtime			
Scalability & Sustainability	Make data-backed decisions for staffing improvement			
	Document and standardize scheduling process			
	Support growth without need for additional staff			
	Integrate scheduling with payroll			
	Integrate scheduling with billing			
	Support audit preparation			
	Keep processes consistent across locations			