



Weekly Team Coordinator Expectations

Week Start Date: _____

Monday	Tuesday	Wednesday	Thursday	Friday
<input type="checkbox"/> Ensure on-call report is updated or N/A <input type="checkbox"/> Review and finalize billing <input type="checkbox"/> Review and finalize payroll <input type="checkbox"/> Email Administrator payroll is finalized by 10am <input type="checkbox"/> Confirm all shifts for the week with clients <input type="checkbox"/> Check caregiver confirmation of scheduled shifts <input type="checkbox"/> Review expiring certifications <input type="checkbox"/> Review employee schedules and verify no one is in OT <input type="checkbox"/> Review and disposition new applicants in Paylocity <input type="checkbox"/> Check Onboarding Status in Paylocity and "Finish" <input type="checkbox"/> Reply to all emails from field nurses <input type="checkbox"/> Send weekly client satisfaction survey <input type="checkbox"/> Check missed documentation from Weekend	<input type="checkbox"/> Ensure on-call report is updated or N/A <input type="checkbox"/> Review and finalize billing <input type="checkbox"/> Review and finalize payroll <input type="checkbox"/> Confirm any shifts scheduled today for future days (this week) with clients <input type="checkbox"/> Check caregiver confirmation of scheduled shifts <input type="checkbox"/> Review and disposition new applicants in Paylocity <input type="checkbox"/> Check Onboarding Status in Paylocity and "Finish" <input type="checkbox"/> Reply to all emails from field nurses <input type="checkbox"/> Check missed documentation from yesterday	<input type="checkbox"/> Ensure on-call report is updated or N/A <input type="checkbox"/> Review and finalize billing <input type="checkbox"/> Review and finalize payroll <input type="checkbox"/> Confirm any shifts scheduled today for future days (this week) with clients <input type="checkbox"/> Check caregiver confirmation of scheduled shifts <input type="checkbox"/> Review and disposition new applicants in Paylocity <input type="checkbox"/> Check Onboarding Status in Paylocity and "Finish" <input type="checkbox"/> Reply to all emails from field nurses <input type="checkbox"/> Check missed documentation from yesterday	<input type="checkbox"/> Ensure on-call report is updated or N/A <input type="checkbox"/> Review and finalize billing <input type="checkbox"/> Review and finalize payroll <input type="checkbox"/> Confirm any shifts scheduled today for future days (this week) with clients <input type="checkbox"/> Check caregiver confirmation of scheduled shifts <input type="checkbox"/> Review and disposition new applicants in Paylocity <input type="checkbox"/> Check Onboarding Status in Paylocity and "Finish" <input type="checkbox"/> Reply to all emails from field nurses <input type="checkbox"/> Check missed documentation from yesterday	<input type="checkbox"/> Ensure on-call report is updated or N/A <input type="checkbox"/> Review and finalize billing <input type="checkbox"/> Review and finalize payroll <input type="checkbox"/> Confirm all shifts for the weekend with clients <input type="checkbox"/> Confirm all shifts for the weekend with caregivers <input type="checkbox"/> Review and disposition new applicants in Paylocity <input type="checkbox"/> Check Onboarding Status in Paylocity and "Finish" <input type="checkbox"/> Reply to all emails from field nurses <input type="checkbox"/> Check missed documentation from yesterday

Monthly

- Day 1** of the month: Run "Expired Certifications" report for last day of the upcoming month and obtain necessary documents / notify manager
- Day 1** of the month: Email Administrator when Billing is finalized
- Day 8** of the month: Call all new clients to confirm understanding of invoice