CLEARDESK

Getting Started Guide

Onboarding Checklist

Follow these guidelines to ensure a smooth onboarding experience with your new remote team member (RTM).

Work Schedule

Clearly communicate the expected shift or work hours, including time zone considerations, to ensure alignment with the team's availability.

Reporting Cadence

Define the frequency of reports (daily, weekly, monthly) and the format for updates on progress and performance to maintain transparency.

Company Email Address

Create a professional email address using the company domain (e.g. name@company.com) for formal communication with clients and team members.

Access to Collaboration Tools

Set up accounts on tools like Slack, Microsoft Teams, or Zoom for real-time communication and meetings, fostering effective collaboration.

Instant Communication

Ensure availability on instant messaging platforms for quick questions and updates, facilitating immediate support and collaboration.

Login Credentials for Project Management Software

Provide access to tools like Asana, Trello, or Monday.com for tracking tasks, deadlines, and project progress.

Seat in the CRM

Grant access to the CRM system (e.g., Salesforce, HubSpot) for managing client interactions and tracking leads.

Onboarding Documentation

Prepare comprehensive documents outlining company policies, procedures, and culture for quick acclimation.

Access to File Sharing Systems

Set up accounts on platforms like Google Drive, Dropbox, or OneDrive for document storage and sharing.

Hardware and Software Requirements

Determine and provide necessary hardware (laptop, headset, webcam) and software (specific applications or licenses) for effective performance.

Training and Resources

Organize training sessions or provide access to resources (videos, guides, or courses) for better understanding of responsibilities and tools.

Performance Metrics and Expectations

Clearly outline performance expectations and key performance indicators (KPIs) for goal-setting and evaluation.

Team Introduction Schedule

Plan introductions with key team members and stakeholders to foster relationships and build a sense of belonging.

Time Tracking and Reporting Tools

Set up accounts on time tracking software (like Toggl, Harvest, or Clockify) to monitor hours worked and productivity.

Point of Contact

Assign a specific team member as the go-to person for questions and support during the onboarding process, providing guidance and assistance.

Feedback and Support Mechanisms

Establish regular check-ins and feedback loops (like weekly one-on-ones) for support and to address concerns.

Role-Specific Goals

Define short-term and long-term goals specific to the role to give clarity and direction from the outset.

Communication Protocols

Establish guidelines for communication frequency and methods (e.g. daily stand-ups, email responses) to ensure alignment and efficiency.

Cultural Integration Activities

Plan virtual team-building activities to promote engagement and integration into the company culture.

Technical Support

Provide access to IT support for troubleshooting and assistance with hardware/software issues.

Personal Development Opportunities

Share resources for personal growth, such as workshops, courses, or mentorship programs relevant to the employee's career goals.

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Home Care Success Plan

Your 4-week guide to building a successful RTM partnership

The Success Plan is a step-by-step guide to smoothly integrate RTMs. It covers weekly goals, communication, and progress tracking, with strategies to build trust, set expectations, and expand responsibilities for long-term success.

Week 1: Introduction & Core Systems

Goal: Acclimate remote team members with your company, culture, and essential systems/tools.

Day 1: Account Setup Welcome & Introduction

1. **Account Set up:** Ensure proper access to computers, email, phone systems, and software tools (scheduling software, communication tools, etc.).
2. **Orientation:** Company history, values, mission, and key policies.
3. **Team Introduction:** Meet key team members and stakeholders (e.g., HR, Operations, and other schedulers).

Resources: Welcome Email Template, Account Setup Checklist

Day 2-3: Systems Training

Scheduling Software Introduction: Introduction to the primary scheduling system (WellSky or similar)

1. Learn how to navigate the basics interface (if WellSky, supervisor is to just review basic functions with RTM)
2. Basic functions (creating, modifying, and cancelling shifts)
3. Reviewing caregiver and client profiles

Communication Tools Training:

1. Overview of communication platforms (e.g., internal messaging system, phone protocol)
2. How to communicate effectively with caregivers, clients, and the internal team

Day 4-5: Understanding Company Procedure

1. **Caregiver Onboarding Process:** Review how new caregivers are onboarded and entered into the scheduling system.
2. **Client Intake Process:** How new clients are set up, including preferences, care plans, and matching them with caregivers.
3. **Policies & Procedures:** Review the company's policies on cancellations, no-shows, last-minute changes, and emergency scheduling protocols.

Week 2: Hands On-Training & Shadowing

Goal: Begin performing actual scheduling tasks with supervision, and shadow experienced team members (focusing on communication style to caregivers).

Day 6-7: Basic Scheduling Task

Supervised Scheduling: Begin scheduling caregiver shifts under supervision (simple shifts).

1. Match caregivers to clients based on availability, skills, and preferences.
2. Handle basic modifications or cancellations.
3. Learn to use flags or alerts for special client needs or requests.

Day 8-9: Shadowing & Observing Experienced Schedulers/Recruiters/Bookkeepers etc.

Shadowing Experienced Scheduler: Observe how a senior scheduler handles complex scenarios (e.g., no-shows, emergency requests, last-minute changes).

Critical Thinking in Scheduling: Learn to troubleshoot scheduling conflicts or challenges.

1. How to manage urgent staffing needs.
2. How to adjust to unexpected changes.

Day 10: Review & Feedback

1. **Supervisor Check-In**: Review tasks completed so far and provide feedback.
2. **Q&A Session:** Address any questions, challenges, or uncertainties.
3. **Assess Comfort Level:** Determine whether the employee feels ready to handle more responsibility or if they need further training.

Week 3: Independent Scheduling/Recruiting & Advanced Tools

Goal: Take on more responsibility (starting with reevaluating RTM skills and reverse shadowing) with minimal supervision and begin using advanced tools or reporting.

Day 11-12: Independent Scheduling

Schedule Full Shift Roster: Independently schedule all shifts for a specific day or week, while adhering to company protocols.

1. **Schedule Full Shift Roster:** Independently schedule all shifts for a specific day or week, while adhering to company protocols.
2. Communicating directly with caregivers to confirm schedules.

Day 13-14: Learn Advanced Feature

1. **Advanced Scheduling/Recruiting Tools:** Learn to use advanced scheduling features (e.g., recurring schedules, time-off management, shift swaps).
2. **Critical Thinking in Scheduling:** Learn to troubleshoot scheduling/recruiting conflicts or challenges.

Day 15: Supervisor Check In

1. **Review Independent Roles**: Scheduling/Recruiting: Supervisor to review the schedules created during the week and offer feedback.
2. **Address Challenges:** Discuss any difficulties encountered and solutions found.
3. **Continue Shadowing or Observation:** If needed, shadow an experienced team member for any areas that require extra learning.

Week 4: Mastery & Problem Solving

Goal: Build confidence in handling complex scenarios and complete the training with full autonomy.

Day 16-17: Managing Complex Situations

Handling Emergency Scheduling Changes: Learn protocols for urgent situations (e.g., caregiver sick calls, sudden client needs).

1. Use the scheduling system to quickly fill last-minute shifts.

2. Learn how to communicate effectively with clients and caregivers in high-stress situations.

Day 18-19: Review Company Protocols & Best Practices

1. **Scenario-Based Exercises:** Review real-world scenarios (e.g., cancellations, no-shows, unexpected caregiver absences) and practice problem-solving solutions.
2. **Optimizing Schedules:** Learn to maximize scheduling efficiency while ensuring high-quality care for clients.

Day 20: Final Assessment & Feedback

1. **Final Review:** Supervisor conducts a formal assessment of the employee's skills, knowledge, and progress.
2. **Final Q&A:** Address any remaining questions and concerns.
3. **Independent Scheduling:** The employee is now expected to schedule all shifts for the upcoming week with full autonomy.

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Best Practices For Home Care Clients

Practical strategies to lead with confidence, delegate smarter, and stay aligned with your remote home care team member.

Create structure & set expectations

- Establish a **consistent daily routine** (e.g., morning check-in, end-of-day update).
- Communicate in **real-time** using tools like WhatsApp, Slack, or Teams for urgent client updates, in addition to email for reports.
- Agree on expectations for **documentation, scheduling, and follow-up** with families or healthcare providers.
- Use a care coordination tool (e.g., ClearCare, Alora, or even Asana/Trello) to track tasks like medication reminders, appointment scheduling, or shift notes.

Meet frequently

- During the first 2–3 weeks, meet **30–60 minutes daily** to align on client care plans and learn preferences.
- Once your rhythm is established, shorten to **10–15 minute huddles** for updates on clients, schedules, and follow-ups.
- Connect regularly with your **Care Coordinator or Client Success Manager** to ensure smooth operations and high-quality care.

Effectively delegate

- Walk your assistant through a **care coordination task from start to finish** (e.g., scheduling a doctor's appointment, updating a client's care log). They can record the process to build a clear SOP.
- Shadow them the first time they handle it (like calling a pharmacy, updating a medication list), then provide feedback.
- Let them complete the task independently, while you review accuracy.
- Once they've mastered it, trust them to handle it consistently so you can focus on in-person caregiving.

Build a long-term project list

- Identify long-term projects that support home care operations (e.g., digital client record organization, birthday/anniversary tracker, care resource library).

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Home Care Roles & Task Descriptions

This task list highlights the responsibilities you can delegate to your RTM (remote team member) giving you back valuable time to focus on providing excellent care.

Scheduler

- Build and maintain up-to-date caregiver schedules across multiple counties
- Respond quickly when someone cancels a shift or doesn't clock in
- Answer calls from clients and caregivers using the VoIP system
- Update records and case notes in WellSky (we'll train you for it)
- Work with the ops team to flag issues and make sure staffing stays smooth
- Conduct regular check-ins and evaluations with caregivers
- Generate weekly reports and keep leadership in the loop

Recruiter

- Source qualified candidates for healthcare roles such as RNs, LVNs, CNAs, HHAs, and caregivers
- Conduct phone screens and manage interviews via HelloHire or similar tools
- Use platforms like CareerPlug, job boards, LinkedIn, and Facebook groups for outreach
- Collaborate with hiring managers to align on hiring needs and timelines
- Maintain and update candidate records in the ATS and recruitment dashboards
- Support document collection, license verification, and background checks
- Track recruitment funnel metrics like application rates, interviews, and time-to-hire
- Recommend ways to improve hiring workflows and sourcing efficiency
- Occasionally assist in recruiting for administrative roles when needed

Social Media Marketing Coordinator

- Plan and execute social media calendar
- Respond to social media inquiries
- Create social media profiles
- Help build a digital network
- Manage groups, content, and outreach for social media platforms such as Facebook, LinkedIn, Instagram, Twitter, Pinterest, TikTok, etc.
- Setup and manage planning platforms such as Hootsuite, Soci, Later, or Buffer
- Create content for social media and other marketing collateral

Lead Generation & Sales Specialist

- Lead generation & touch qualification
- Cold calling & prospecting
- Appointment setting
- Client nurturing
- Follow-up emails & phone calls
- Clean up and manage any CRM such as HubSpot, Salesforce, Zoho, etc.

Executive Assistant

- Manage calendars, including scheduling, confirmations, and follow-ups
- Join meetings on behalf of the AE when needed to maintain client connection and momentum
- Keep CRM records clean and up to date (we use HubSpot)
- Track deals in the pipeline and identify next steps or gaps
- Draft professional emails and follow-ups to support active sales conversations
- Respond to inbound inquiries and route them to the right internal contact
- Coordinate with SDRs regarding bounced leads or incomplete contact data
- Handle ongoing admin tasks to support the AE's productivity and focus

Bookkeeping Assistant

- Record daily financial transactions, including payments, invoices, and reimbursements
- Maintain accurate ledgers and reconcile accounts regularly
- Assist with payroll preparation and caregiver payment tracking
- Generate and update financial reports for agency leadership
- Track client billing, payments, and outstanding balances
- Organize receipts, expense reports, and supporting financial documentation
- Support compliance by keeping financial data audit-ready
- Collaborate with your agency's accountant or financial advisor as needed