



Expert schedulers who can orchestrate complex patient visits are integral to home-based care agencies. Their role proves mission-critical to smooth operations, but ineffective scheduling can severely undermine both patient care and business performance.

The role of scheduler at a home-based care company often functions as an expert puzzle solver. Broadly, schedulers are responsible for coordinating patients' visits, while keeping in mind staff availability and suitability. They also serve as a point of contact for staff and clients, or patients.

A particularly skilled scheduler has a strong understanding of Outcome and Assessment Information Set (OASIS), the plan of care, as well as a working knowledge of the disciplines assigned to a case, according to Cleamon Moorer Jr., president and CEO of American Advantage Home Care.

"[For example], if an LPN and a CNA are both assigned for the same day — is there something that the CNA can do to the top of their license, so the LPN could actually be assigned to a different patient for that rotation," he told Home Health Care News. "This means having a clinical understanding, as well as the ability to optimize the schedule to ensure that the patient's needs are met within the care plan."

Based in Dearborn, Michigan, American Advantage Home Care provides skilled nursing, rehab and specialty care services. Currently, the company serves four counties in the Southeast Michigan area and has a census of 200 patients.

At a company like VNS Health, which serves five different boroughs in New York City, as well as multiple counties across the state, a scheduler must manage the size and scope of the company's service area.

New York-based VNS Health is a full-service home-based care organization. On any given day, the company has over 73,000 patients, members and clients in its care.

A common misconception about scheduling is that it's purely an administrative role, according to Daniel Carpenedo, operations support director at VNS Health.

"It really goes beyond that and into a whole area of supporting that field staff, our patients and our caregivers, that we serve with their visit request, their preferences, and that changes, sometimes on a day-to-day basis," he told HHCN.

Identifying expert schedulers

A strong sense of urgency is one defining characteristic that Andrew Dobson, director of scheduling at Tribute Home Care, has noticed among schedulers who excel in the role.

"A lot of the more successful scheduling partners we've had here at Tribute were people that are very motivated," he told HHCN. "They're self-disciplined. They have a really strong sense of organization."

Founded in 2012, Tribute offers personal care, companionship care, housekeeping assistance, dementia care and more. The company operates in Massachusetts, Maryland, Illinois and Northern Virginia.

As director of scheduling, Dobson participates in the scheduler hiring process at Tribute. Typically, home-based care companies know what skills and characteristics make an expert scheduler, Dobson said. Leaders at these companies also know when a scheduler isn't the right fit and how this impacts the organization.

To make the hiring process easier, Tribute utilizes an assessment tool to help screen promising candidates.

"We have our applicants who've made it through the first round take this test," he said. "It's a good indicator that they'd be a strong fit for the role. They also usually go through three or four interviews before we make a hiring decision. The hardest part is just the amount of time that it takes to get them to that point, and then making that decision."

The tool helps the company identify candidates best suited for the fast-paced, detail-oriented and collaborative nature of the job, Dobson said.

A scheduler who does not have the clinical insight and approaches the job as plotting time slots on a calendar would not add value to a home-based care organization, Moorer said.

Similar to Carpenedo, Moorer also emphasized the importance of understanding the company's geographical scope and how this relates to scheduling staff.

"They should have in mind the geography of where the visits are concentrated on a particular day, and even thinking of time of day, in terms of rush hour traffic, or trying to set a window for clinicians to make their visits," Moorer said.

Companies must also recruit employees comfortable working beyond the confines of a typical 9-to-5 job.

“A lot of the new business requests come in, and maybe we get a ton of call-outs at four o’clock on a Friday,” Dobson said. “Some people can’t really deal with the stress of seeing all the visits pile up, and they get burnt out very easily. We try to do our best to work with people who might struggle, but I think people who have the desire to play the puzzle that we have here in scheduling are most successful in this role.”

How schedulers create value

Expert schedulers deliver multiple layers of value across the organization.

Poor scheduler performance can negatively impact charting. It can also lead to staff turnover if the caregiver or clinician doesn’t believe their workload is being managed properly.

As the point of contact between staff and clients, schedulers are well-positioned to help improve communication.

“Schedulers communicate with both of those groups daily, and when that communication is timely and reliable, that drives that improvement step towards many key performance metrics,” Carpenedo said.

This can, in turn, help home health providers that are trying to perform well under the [Home Health Value-Based Purchasing \(HHVBP\) Model](#). Under HHVBP, patient satisfaction and consumer outcomes are critical and could lead to financial incentives.

New business inquiries are another area where schedulers can positively impact the companies they serve.

“The rest of the company really depends on scheduling partners to make that decision as to whether or not we can take the new client that is coming in because [the scheduler has] the biggest sense of what that availability is,” Dobson said.

A scheduler’s knowledge of a patient’s diagnoses and patient needs can help drive clinical value, Moorer noted.

Ultimately, schedulers are the foundation for an efficient operations team, according to Carpenedo.

“They are the foundational support, really the backbone of what happens on a day-to-day basis,” he said.

HHCN is an independent source for breaking news and up-to-date information on the senior in-home care industry. Their coverage spans the home care world specifically, from large, national service providers to independent care companies. Their news and perspective give industry professionals the information they need to make the best decisions in their day-to-day business operations. HHCN has 636,710 monthly visitors.