

COORDINATOR POLICY AND PROCEDURES

A laptop and phone are made available to each Coordinator. The pin # to log into the laptop is: **1104**. The Helping Hands phone number is 352-973-2284. We receive requests for information via phone calls and emails. It is important to view both these sources during the day to respond to all requests from The Villages' residents. A Coordinator's day is from 8 am to 4 pm. Remember, you are not required to answer incoming calls as they are received. In many cases, it is best to allow calls to go to voicemail to allow you to review the information before calling the resident back. Cut off for all incoming requests is 4 pm. This allows you to complete daily reports for staff, which should be sent out no later than 5 pm.

1. We use an Excel spreadsheet with multiple sheet tabs to track all Helping Hands information. This spreadsheet contains the following sheet tabs:
 - a. Current Receipts
 - b. Agreement
 - c. Return History
 - d. Bar Codes
 - e. Calls & Inventory
 - f. Office Schedule
 - g. Return Equipment Form
 - h. Donation Equipment Form
2. Start by opening both email addresses in Chrome
 - a. Open vha.helpinghands@gmail.com
 - i. Click on Sign In
 - ii. If it doesn't come up automatically, enter vha.helpinghands@gmail.com
 - iii. If password doesn't come up automatically, enter Office@1104

- iv. Click on Gmail to open email
 - b. Open vha.helpinghands.office.mail@gmail.com
 - i. Click on “V” inside gray circle in upper right corner and click on Add Another Account
 - ii. Open vha.helpinghands.office.mail@gmail.com; the password is the same
- 3. Open Excel
 - a. Open the previous day’s worksheet
 - b. Upon opening, answer “OK” to “Microsoft Excel cannot calculate a formula”; click on “Enable Content”; and ALWAYS answer “Yes” it is a trusted document
 - c. Verify (this is very important) that Autosave (top left on the screen) is on
 - d. Click on File and Save A Copy changing the name only to indicate the current day’s date
 - e. When the current day’s spreadsheet is open, again verify that Autosave is on (verify this at various times during the day)
- 4. Go to the Current Receipts sheet tab and prepare the spreadsheet for daily entry.
 - a. Based on incoming calls, complete a new line for all conversations. Start each line with the current date (mmdd) followed by a sequence of alphabet characters starting with a thru z. If you have more than 26 entries for the day use aa thru zz. Note: Action, Item, Village and Status columns have drop down menus to ensure we are entering information correctly for the spreadsheet to maintain inventory and call types. When you are in any of those columns a small arrow will show in the lower right-hand corner next to the cell. Click that arrow and all allowed entries for the cell will show. Select the entry you wish to use.
 - b. Set aside the first two entries of the day for the office to use for walk-ins. This will be Ticket #mmdda and #mmddb with Action column “Office Issued,” and Status column “Reserved for Office”. Date for Office Issued is today’s date
 - c. Date column is always the next day for all the new entries, when the equipment will be picked up

- d. When answering calls, you may want to write everything down before entering the information into the computer. You can also let the calls go into voicemail first and gather all the information you need before calling the resident back.
- e. After making a Waiting Status entry, be sure to go to the Calls & Inventory sheet tab and make an entry in the red column adding 1 to the red column which will decrease the equipment from inventory.
- f. Check the mailbox of vha.helpinghands.office.mail@gmail.com for any emailed requests and respond accordingly. Do this a few times during the day to make sure all is taken care of by 4 pm
- g. Please see the Appendix at the end of these instructions for procedures to use for Information, Extension and Cancellation calls.
- h. **ONLY** residents of The Villages may borrow equipment and only 4 items can be loaned to each resident for a maximum period of 12 weeks.

5. AT 4 pm, prepare the day's report:

- a. Using the Current Receipts sheet tab, highlight the entire worksheet. The best way is going to top of worksheet and highlight the arrow in corner of top column and row. Select Sort & Filter in the Home toolbar, click on Custom Sort and make sure the "My data has headers" box is checked. The sort data in the first column should be Status, Ticket and +
- b. Once sorted this will have all the Waiting Status and You're Cancelled at bottom of the worksheet.
- c. Using the Row Headings, highlight everything except Column Headings, Waiting Status and You're Canceled, right click with cursor in the highlighted area, and click on Hide
- d. Next copy the rows containing the Column Headings and Waiting Status and You're Cancelled status items.
- e. Go to the Office Schedule sheet tab and see who the next day's shuttle driver is. This information will be colored coded with your name.
- f. Go to vha.helpinghands@gmail.com and select Compose.
 - i. TO: name of Shuttle Driver and VHA Office Printer
 - ii. SUBJECT: Pickups for Tuesday, October 18, 2022 (pickups for next day and date)
 - iii. In the body of email paste copied information from worksheet.

- iv. Send
- g. Go back to Current Receipts and highlight the entire worksheet, right click inside the highlighted area, and select Unhide.
- h. Sign off and shut down until next week.

Questions: call Sandra at 248-421-8345

Appendix

PROCEDURES FOR EXTENSION, CANCELLATION AND INFORMATION CALLS

(as of 3/9/22)

PROCEDURE FOR EXTENSIONS

A resident calls to extend their weeks:

1. Find the original Ticket # (or Bar Code) and type in "ADDRESS and/or COMMENT" column the date called, extend to date and your initials;
2. Change WEEKS to correspond with extend date; and
3. Create an Information Ticket on the current day's spreadsheet and type in ADDRESS and/or COMMENT the ticket #/bar code, date called, extend to date and your initials. REMEMBER: "Information" Ticket STATUS is always "Complete".

ORIGINAL TICKET FROM (most probably) RETURN HISTORY

Ticket	+	ACTION	Item	Bar Code	NAME	ADDRESS and/or COMMENT	Village	Phone	DATE	WEEKS	RETURN DATE	Status
0127t		Pickup at office	4 wheel rollator (Std 5'1" to 5'10")	HH476	Joan Gerber	812 Orchid St. called 2/18 extend to 4/22 jd	Orange Blossom Gardens	443-619-9085, friend Celeste Boucher	1/28	12	4/22	Picked Up at Office

TODAY'S TICKET

Ticket	+	ACTION	Item	Bar Code	NAME	ADDRESS and/or COMMENT	Village	Phone	DATE	WEEKS	RETURN DATE	Status
0218u		Information			Joan Gerber	812 Orchid St. 0127t/HH476 called 2/18 extend to 4/22 jd		(352) 268-2283			1/0	Complete

PROCEDURE FOR CANCELLATIONS

A resident calls to cancel:

1. Find the original Ticket # and change ACTION to “Cancelled”;
2. Type in ADDRESS and/or COMMENT the date of the call and RETURN TO INVENTORY. REMEMBER: “Cancelled” Ticket STATUS is always “You’re Cancelled”.
3. Add equipment back into inventory.
4. Create an Information Ticket on the current day’s spreadsheet.
5. Type in “ADDRESS and/or Comment” column the original Ticket # and RETURN TO INVENTORY. REMEMBER: “Information” Ticket STATUS is always “Complete”.

ORIGINAL TICKET

Ticket	+	ACTION	Item	Bar Code	NAME	ADDRESS and/or COMMENT	Village	Phone	DATE	WEEKS	DATE RETURN	Status
0215e		Cancelled	Transport Chair		Kathleen Miller	1619 Bytewood Loop 2/21 RETURN TO INVENTORY	Sunset Pointe	352-661-5498	2/16	2	3/2	You’re Cancelled

TODAY’S TICKET

Ticket	+	ACTION	Item	Bar Code	NAME	ADDRESS and/or COMMENT	Village	Phone	DATE	WEEKS	DATE RETURN	Status
0221c		Information			Kathleen Miller	0215e RETURN TO INVENTORY		352-661-5498			1/0	Complete

PROCEDURE FOR INFORMATION CALLS

1. Create a new Ticket on the current day’s spreadsheet;
2. Information calls only need ACTION (Information), ADDRESS and/or COMMENT (Directions, Hours, Equipment, etc.) and STATUS (Complete) filled in.

TODAY’S TICKET

Ticket	+	ACTION	Item	Bar Code	NAME	ADDRESS and/or COMMENT	Village	Phone	DATE	WEEKS	DATE RETURN	Status
0221e		Information				Directions					1/0	Complete

