

Periodic Processes

- Daily

Action	Status	Who?	File Name	Comments
Prepare Daily Worksheets	Edit	Daily Coordinator	Coordinator Procedures.pdf	For Office Staff/ Daily Coordinator
Verify Daily Excel Entries	Concept	Coordinator Lead	?	
Backup Worksheets	Concept	Daily Coordinator	Coordinator Procedures.pdf	Disaster Recovery
Prepare Pickup List	Edit	Daily Coordinator	Coordinator Procedures.pdf	For Shuttle Driver/ Office Staff
Other Daily Actions				

- Weekly

Action	Status	Who?	File Name	Comments

- Monthly

Action	Status	Who?	File Name	Comments
Update DME Inventory	Complete	Lead Coordinator	Inventory Update.pdf & HH End of Month Closing Procedures.pdf	
Gather Statistics	Edit	BOD Liaison / Lead Coordinator	HH End of Month Closing Procedures.pdf	
Past Due DME Report		BOD liaison		
Schedule staff for next month	Concept	HH Scheduler	?	
Other Monthly Actions		All?		

- Annually

Action	Status	Who?	File Name	Comments
Gather Statistics		BOD Liaison		
Other Annual Actions		All?		

- As Needed

Action	Status	Who?	File Name	Comments
DME repair or scrap	Complete	Office Volunteer Coordinator	DME Repair or Scrap.pdf	Red-Tagged Items
Release of DME different from Pick list	Concept	Office Staff	DME different from pick list.pdf	At client's request
Documentation Review	Concept	Documentation Coordinator		Staff Generated

Documentation Notes:

1. Establish Bookmarks for each process
2. Create internal & external links to each process description for these tables
3. STATUS: Concept, Draft, Revision, Edit, Proofread, Complete

We are in the process of documenting all HH processes currently being followed and used.

Using Hardcopy ONLY, please review, comment, and add to the tables; and provide me with any copies of procedures, writeups, and notes you are using especially about HH Excel worksheets.

Don't worry about neatness since I will be transcribing and ask you to review once documented.

Thanks much,