

# GEOH'S ULTIMATE ADMIN SURVIVAL GUIDE

*Everything you need to know for how to  
run a great agency as an administrator.*



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# ADMIN SURVIVAL GUIDE

Learn best practices to manage caretakers,  
decrease manual check-ins and run a  
great agency.

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# 1

CHAPTER

HOW HARD IT IS TO  
RUN AN AGENCY

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# **SARA'S STORY**

**Sara was a busy mom who had just opened her own home care agency. She was proud to be providing a service that would help so many families in need, but she never expected the challenges that came with it.**

**The paperwork alone was enough to drive her crazy. Between the Medicaid regulations and all the required forms for caregivers, Sara felt like she spent every night buried in paperwork instead of spending time with her family. And then there were the caregivers themselves; some weren't following protocol and others were always late or didn't show up at all!**

**It seemed like no matter how hard she worked, Sara couldn't keep up with everything. Her stress levels were skyrocketing and she started to worry about whether or not her business would survive this tough period.**

- This is a true story but, names may have been changed to protect the agency owner's privacy.

# **BUT, THERE WAS HOPE!**

But then one day, something changed - Sara called GEOH! Trevor was able to work out all her billing to get her paid-- on time and clean up her TELLUS portal! Then, Jessica from GEOH came in to become her Agency Administrator.

With this newfound help, Sara could finally focus on what really mattered: providing quality care for those in need and spending more time with her family.

**We get that running an agency is HARD!**

Sara's story is proof that even when things seem difficult and overwhelming, you can still find ways to succeed if you don't give up hope!

This guide will give you Jessica's best tips and tricks to running your agency like a pro! So, you just like Sara, can get your agency back on track!



# 2

CHAPTER

## START WITH COMMUNICATION

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# IT ALL STARTS WITH COMMUNICATION

Sara's agency went from 95% manual check in's down to 5% manual check-ins. When we asked Jess how to stop manual check ins she stated "It's simple, it all just starts with a little communication."

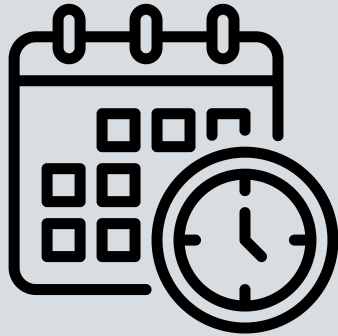
## COMMUNICATION TIP #1

***"Take time to sit down and make a schedule your caregivers will actually follow."***

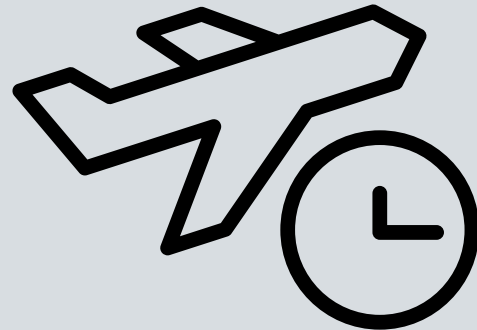
Making schedules can be quite a challenge, but it's crucial not to take the easy way out and schedule everyone according to your convenience. To ensure optimal caregiver scheduling, it's essential to communicate what their preferred schedule is, honor time-off requests, allow agreement time, *and then post the schedule*. When caregivers agree to the schedule upfront, you can count on their reliability, and it'll save you from unnecessary hassle in the long run.



1. Ask for your caregivers preferred schedule.



2. Honor time your caregivers off requests



3. Let your caregivers agree to their schedule in advance.

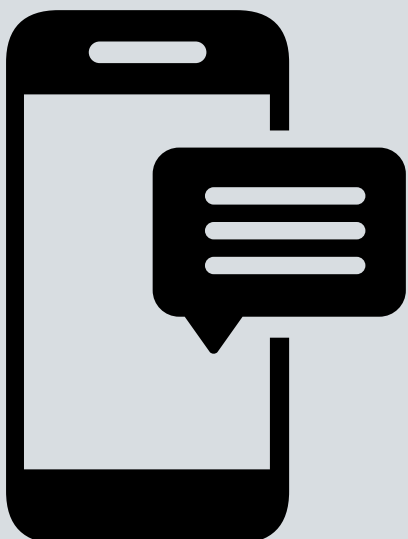


# COMMUNICATION TIP #2

***“Have multiple ways to communicate with your caregivers.”***

To truly master the art of effective communication with your caregivers, utilize multiple communication methods. Utilizing text, email, and the GEOH APP can further enhance the quality and efficiency of communication. It is also beneficial to utilize reminder systems, such as sending reminders before a shift, as this helps to prevent any miscommunications or missed appointments. By implementing these strategies, you can establish clear and consistent communication with your caregivers, leading to a more efficient and productive caregiving relationship.

**Text**



**Call**



**Notifications**



# 1. Use multiple ways to communicate with your caregivers.

Text



Call



Notifications



# 2. Send out reminders the day and hour before their shifts.





# 3

CHAPTER

THE SECRET TO  
GETTING CAREGIVERS  
TO FOLLOW THE  
RULES.

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## **HAVING A DISCIPLINARY SYSTEM**

Jessica has a method to minimize manual clock-ins and ensure caregiver adherence to schedules at the agency. By implementing a disciplined system, she has managed to maintain caregivers and reduce manual check ins. If you're aiming to achieve similar results, consider sitting down and creating a list of rules and a strike policy for caregivers to follow. This structured approach will help foster accountability and reduce manual check-ins within your agency.

# CREATING YOUR DISCIPLINE SYSTEM

*“ Keeping caregivers accountable is key.”*

Jessica's rules look like this:

1. After a schedule is set that you agree to, you may not back out without 48-hour notice.



2. You must clock in on time, or a strike will be issued. If you clock in late you must call and explain why.



3. You may not miss a visit.



4. You must use GEOH to clock out at the designated time.



# CREATING YOUR DISCIPLINE SYSTEM

*“ Keeping them accountable is key.”*

## Jessica's strike system.

1. A documented warning is given.



2. A second warning is given in letter form. Stating, on the third strike, you may not stay with the agency.



3. Caregiver is removed from the agency due to not following protocol.





# 4

CHAPTER

WHAT ADMINS NEED  
TO DO DAILY.

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# THE CHECKLIST

*“ Having a checklist helps me run my day so I can make sure I’m on top of everything.”*

Jessica’s final tip for administrators was to have a checklist to follow every morning and afternoon. That way nothing is left undone, or forgotten about. Use a checklist to stay on top of everything! Keep track of caregivers and make sure nothing slips through the cracks.



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# Admin Daily Checklist

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01 Check emails

---

02 Respond to urgent emails

---

03 Review today's schedule

---

04 Get materials ready for any meetings for the day.

---

05 Check that all caregivers have checked in for morning assignments

---

06 Update to do list/ add any urgent tasks.

---

07 Update the calendar/ make any adjustments needed to client visits and the daily schedule

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08 Confirm appointments for the next day

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09 Ensure all caregivers have checked out, call and issues warnings for those who have not.

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We hope you find these tips  
and printables helpful for  
running your agency! We have  
hope that great things are in  
store for your agency, and if  
you ever need help remember  
we here at GEOH are here for  
you!

- The GEOH team



**"There is nothing impossible  
to they who will try.**

Alexander the Great



# YOU CAN DO THIS!

Questions? Ask us here: (317) 455-3218

Q U E S T I O N S ?

[GEOH.APP](https://www.geoh.app)