

## The (Virtual) Scheduling Process Start to Finish

**NB:** some tasks can be done simultaneously or out of order. Some can be large workload, so can ask for help!

1. Date/time/type of assessment established by Liane Weber/Adjudicator (currently Andrea in Lacombe).
  2. Draft invitation letters – one version for TAs, second for Evaluation, third for Re-Evaluation (Catherine reviews with Liane), including identifying attachments.
  3. Source locations (creating roster for future) for assessment times, plus 30 minutes on each end of day. Create Event in Neon once location confirmed (see ‘Adding Events’ @ <https://thelifelinecanada.ca/neon-management-software/> )
  4. Develop tentative schedule in Google Sheet Registrants’ List. Temperament Assessments (clustered together) and Evaluations/Re-Evaluations (clustered together) are to be scheduled 20 minutes apart back-to-back.
  5. Even if location not yet sourced, as early as possible send e-mail invitations to get potential numbers; ask for reply in 3 days. Likely location won’t be finalized until we know our numbers.
  6. If no reply, send reminder and ask for reply in 3 days.
  7. If no reply, make phone call (as may be in their junk mail) – have them access and respond to e-mail.
  8. Track all replies on Google Sheet Registrants’ List (color coding)
  9. Move schedule around as needed (e.g., fill in blanks due to declines or if possible, move to fit specific needs)
  10. Send final schedule email – final time, location, etc. Ask for final confirmation back ASAP.
  11. Log all confirmed scheduled into NEON (type (e.g., 1<sup>st</sup> TA Scheduled, Evaluation Scheduled), and attach to Event (see ‘Adding a Registrant to an Event’ @ <https://thelifelinecanada.ca/neon-management-software/> )
  12. After event, log all attendees in NEON Type; log all “not ready”, “pending” and “passes” in Type as confirmed by Adjudicator (see below).
  13. For registrants who don’t show up – choose applicable Type in NEON (e.g., 1<sup>st</sup> TA No Show; Evaluation No Show)
  14. Upload any related documents sent because of completed assessment
- Use [Adjudicator@thelifelinecanada.ca](mailto:Adjudicator@thelifelinecanada.ca) webmail for TA and Evaluation invitations and correspondence; search for invitations as needed in Sent folder (no need to move to a folder) file responses accordingly (i.e., accept/decline) in Scheduling Confirmations folder
  - Use [Certified@thelifelinecanada.ca](mailto:Certified@thelifelinecanada.ca) webmail for Re-Evaluation invitations and correspondence; file sent and responses in certified members’ folder

## The Assessment Logging Process End to End

**NB:** all tasks to be logged by Scheduling Coordinator/Admin Team except On-line Learning registration which will be logged by Liane Weber. See screen shot with Catherine Stashyn mock-up at end of this document for example of the Type Log for a person who has reached re-evaluation/certification.

Log each step in NEON “Type” and Google Sheet Registrants’ List (color coded). Following are the types that will demonstrate the journey to certification (do not delete any; rather, leave showing to reflect the journey)

1. 1<sup>st</sup> TA Inquiry
2. 1<sup>st</sup> TA Scheduled

3. 1<sup>st</sup> TA Pass (or 'Not ready'/'pass pending'/'No show')
4. On-line Course Registration – Liane
5. On-line Skills Training Course Complete (once LMS system sends confirmation)
6. 2<sup>nd</sup> TA Scheduled
7. 2<sup>nd</sup> TA Pass (or 'Not ready'/'Pending')
8. Evaluation Registrant
9. Final Evaluation Pass (or 'Not Ready'/'Pending'/'No show')
10. Re-Evaluation (YEAR) Pass (or 'Pass Pending')

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**Catherine Stashyn #8324**  
Last edited by Catherine Stashyn on Jan 5 at 6:49 PM

**About**

- Timeline
- Relationships
- Addresses 1
- Event Registrations**
- Memberships
- Store Orders
- Notes 1
- Activities
- Sent Emails 1
- Volunteer Projects 2
- Case Management
- Case Mgmt Follow-Ups

NAME	
First	Catherine
Middle	—
Last	Stashyn
Preferred	Catherine
Prefix	—
Suffix	—
Salutation	—

CONTACT	
Phone	(250) 808-51
	—
	—
	Fax
Email	catherinesta: administrato
	—
Address	3429 Camell Kelowna, BC
	—
	County
Online	—

ACCOUNT DETAILS	
Type	1st TA Inquiry 1st TA Not Ready 1st TA Pass 1st TA Scheduled 2nd TA Not ready 2nd TA Pass Certified (non-adoption) Evaluation Registrant Final Evaluation Not Ready Final Evaluation Pass Final Evaluation Pass Pending Online Skills Training Course Complete Re-Evaluation 2021 Pass Re-Evaluation 2021 Pass Pending Volunteer
Source	—
Household	—
Employment	—

CONTRACTS	
Non-Disclosure Signed	done
Assisted Adoption Contract Signed	—
Personal Adoption Contract Signed	—

VOLUNTEER INFORMATION	
Volunteer Type	Volunteer
Date of Application	—
Age	—

Type here to search



Find account section



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Activities

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Case Mgmt Follow-Ups

NAME

First Catherine

Middle -

Last Stashyn

Preferred Catherine

Prefix -

Suffix -

Salutation -

ACCOUNT DETAILS

Type	1st TA Inquiry 1st TA Not Ready 1st TA Pass 1st TA Scheduled 2nd TA Not ready 2nd TA Pass Certified (non-adoption) Evaluation Registrant Final Evaluation Not Ready Final Evaluation Pass Final Evaluation Pass Pending Online Skills Training Course Complete Re-Evaluation 2021 Pass Re-Evaluation 2021 Pass Pending Volunteer
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Source -

Household -

Employment -