**PAYROLL:**

1. Run Opus Approved Timesheet report for the 1st – the 31st if your tutors are contractors. If employees - pay every 2 weeks.
2. Spot check the report to make sure that everything looks good.
3. Look out for Timesheets not associated with Sessions. This would be for admin hours or other non-session related pay.
4. Pay within 3 business days after the last day of the month. Contractors: ACH Bank Transfer, Cheques/Checks, or Online Banking Bill Pay. Payroll service if employees.

**NEW TUTOR:**

1. Schedule interview
2. Add tutor information to Opus (Remember to add rate of pay)
3. Write Tutor Bio Add photo when received
4. Add to Orientation RSVP list
5. Send Facebook invite
6. Send *My Back Check* Invite (a Canadian Criminal Record Check)
7. Check off, in tutor profile, when the following is completed:
   1. Criminal record check received
   2. References checked
   3. Orientation attended
8. Send Tutor Welcome Email including Orientation Info
9. File Tutor

**NEW STUDENT:**

1. File enrollment form and signature in student profile
2. Package any workbooks and record on curriculum board (only if needed)
3. Data Entry
   1. Enter family into **Opus**
   2. Enter parents - primary and other. Any notes as to different locations/separation etc.
   3. Input enrollment charges/hours
   4. Create alert as necessary - asterix “\*” at the beginning of last name and note in admin notes section.
   5. email the family a welcome email with policies attached
   6. Create a work order
   7. Enter payment and enrollment into opus
   8. Schedule agreed upon tutoring schedule into Opus Calendar

**MAKING A MATCH:**

1. Filter tutors by subject and location
2. Email / Text Message all qualified tutors using Opus Tutor Match Template
3. If no response is received within three hours, being calling tutors directly.
4. Once prospective tutor is found, verify qualificationsand schedule of potential tutor
5. Opus:
   1. Make sure that the instructor has a timesheet type with related Session Type for this student.
   2. Under tutor subtab / Students, search for and click on the student’s name. This will add the student to the tutor’s account, giving the tutor access to the student’s information. Note, when you associate a student to a tutor, an email is sent out to both the tutor and parent about the match. Therefore, do not associate students to tutor accounts unless you want this email to be sent out.
   3. Make sure that Student has appropriate Session Type with correct billable rate.
   4. Call family to let them know the match is complete and to check their email for the tutor match email.

**REMATCH:**

1. Create a work order
2. Ensure you have current availability and current schedule.
3. Enter notes into Opus
4. Follow matching procedures
5. Send Student Assessment signature email to old tutor and use to update student profile.

**TUTOR LEAVES YOUR EMPLOY:**

1. Tell tutor we will notify family and to work with us until we get all students re-matched.
2. Send Exit Interview signature email to tutor.
3. Make sure all students are removed from tutor account / subtab Students.
4. Disable the tutor’s account.

**CLOSING A STUDENT ACCOUNT:**

1. Change status in Opus to DISABLED
2. Negative client: Remove tag for email in Opus – remove from Constant Contact
3. If hours expired or refunded: ensure hours have been deleted and notes made in Opus.
4. Notes in Opus: summarize reason for close in notes of Opus and note that the student file is archived.
5. Put yellow dot on file and move to archives

**NEW SUPPORT MATERIALS PURCHASE:**

1. Order
2. Process payment in Opus
3. Note in **Opus** Notes that curriculum has been ordered
4. Add to mailed out list
5. Package and put in outbox

**TUTOR ARCHIVE:**

1. Disable add notes to OPUS– reason, etc.
2. Contact Info – uncheck all
3. Change login info
4. Remove from Facebook or any groups you use

**OTHER TASKS:**

1. Approve session reports. Contact tutors to request confirmation, corrections, etc.
2. First session check in emails and calls
3. Seasonal check in emails and calls
4. Every Friday, contact all clients with a student with an outstanding work order