

# SimboVara Workflow Customization: Maintenance Checklist for Workflow Customizations - Admin Panel

## Purpose

Provide a repeatable process to keep Copilot accurate over time.

## Monthly checklist

- Verify **on-call schedule** ownership and escalation paths.
- Confirm **office hours** for holidays and season changes.
- Skim each **workflow** box for policy changes.

## Quarterly checklist

- Listen to a sample of calls to ensure prompts are clear.
- Review **Website URLs** and remove outdated PDFs.
- Call each **transfer number** from an external line to confirm it rings.

## Tips and Good practices

- Assign a primary owner and a backup owner.
- Record change notes inside the first line of each workflow with the date, for example  
“Updated intake rules on 2025-09-15.”
- Encourage staff to submit suggested edits using one standard form.

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