

Recall Reminders Setup Checklist

| ACTIVITY | STATUS | RESPONSIBLE | COMMENTS |
|---|--------|-------------|----------|
| 1. Determine if your facility will utilized the Recall Reminders brought in with patch SD*5.3*536 | n/a | | |
| 2. Determine responsible person who will setup the Recall Reminders. | | | |
| 3. Determine if site will be using Cards and/or Letters. | | | |
| 4. Responsible person should review the SDAM MENU protocol and ensure that SDRR EVENT is an ITEM TEXT. | | | |
| 5. Assign the SDRR MANAGER Security key to your site's Recall Reminder Coordinators. | | | |
| 6. Task Jobs A. If Site will be using the Letters, Auto Print for Recall Reminder [SDRR TASK JOB] needs to be setup up as a scheduled task using Kernel option Schedule/Unschedule Options (When scheduling this job there is NO need to enter DEVICE FOR QUEUED JOB OUTPUT. This is determined by the printer name entered when setting up Recall Teams. ONLY printers that print 12 pitch should be selected for printing letters.) | | | |

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| B. If Site will be using Cards, Auto Print for Recall Reminder Cards [SDRR TASK JOB CARD] needs to be setup | | | |
| C. Clean Up Clinic Recall Entries [SDRR CLEAN-UP] to run after 10:00pm | | | |
| 7. Mail Group: SDRR BAD ADDRESS needs to be populated with members | | | |
| 8. Determine who will be responsible for setting up the Recall Reminder [SDRR MANAGER MENU] which is locked with security key SDRR MANAGER | | | |
| A. The parameters should be performed in the following order: | | | |
| 1) Enter/Edit Clinic Recall Site Params [SDRR RECALL REMINDER PARAMS] NOTE: Entry at the DIVISION prompt is not an entry from the MEDICAL CENTER DIVISION file (#40.8). The parameter settings allow sites to set up “divisions” or “groupings” for easier manageability of different areas of the facility. | | | |
| B. Edit/Add Recall Teams [SDRR ADD RECALL TEAM] | | | |
| C. Edit/Add Clinic Recall Provider [SDRR ADD RECALL PROVIDER] | | | |

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| D. Enter/Edit Appt Types [SDRR APPT TYPE] | | | |
| E. Enter/Edit Clinic Letters [SDRR CLINIC LETTER] | | | |