

Scheduling Supervisor Setup Checklist

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
1. Designated person who will be responsible for the review and setup of clinics to be utilized by the medical center and medical center CBOC's.			
2. Set up A Clinic			
A. Responsible person will meet with DSS and clinical staff to determine naming conventions and appropriate assignment of DSS identifiers for the facility and CBOC clinics. It is suggested a clinic form be developed to notate the information specific to clinicians preferences regarding days/times of clinics, blocking out portions of days for meetings.			
B. Clinics will be setup in Vista utilizing the SET UP A CLINIC option. Clinic name, specialty, DSS identifiers, date/times clinic meets will all be set utilizing this option. Data provided on your clinic setup form will assist greatly in this initial setup. Use record tracking or fileman enter/edit to assign institutions to clinics			Say NO to available indefinitely question.
3. Enter/Edit Letters			
A. Determine responsible person to setup all pre-appointment, cancellation and no show letters. This will require obtaining any special instructions, etc that clinicians may want indicated in they're letters. B. Upon completion of letter setup, letters will need to be added to the appropriate clinic setup			
4. Add/Edit Holidays – All holidays should be entered via this option.			
5. Scheduling Parameters – . Identify user that will be responsible for the Scheduling Parameters option which is			

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<p>used to display and edit the Scheduling-related parameters using the List Manager functionality .</p> <p>A. Use the SD PARM PARAMETERS Menu.</p> <ol style="list-style-type: none"> 1) Edit Parameters (mail groups, etc) 2) Edit Divisional Parameters 			
<p>6. Mailgroups</p> <p>A. Determine responsibility for setting up mailgroups for ALL scheduling related programs. This includes EWL, PAIT, Performance Monitors, etc Mailgroups are listed below:</p> <ol style="list-style-type: none"> 1) SD EWL BACKGROUND UPDATE 2) SD WAIT LIST 3) SD PM NOTIFICATION 4) SD PM NOTIFICATION TIU 5) SD WAIT LIST TRANS TO AAC 6) SD-PAIT 7) SDWL-TRANSFER-ADMIN 8) SC CLINIC WAIT TIME 9) SCDX AMBCARE TO NPCDB 			
<p>7. Background Jobs</p> <p>A. Determine responsibility for setting up task jobs for ALL scheduling related programs. This includes EWL, PAIT, and PM etc. Please review the PAS/HIMS BACKGROUND job checklist for background job descriptions.</p> <ol style="list-style-type: none"> 1) SCDX AMBCARE NIGHTLY XMIT 2) SCENI IEMM SUMMARY BULLETIN 3) SDAM BACKGROUND JOB 4) SCMC PCMM HL7 TRANSMIT 5) SCMC PCMM NIGHTLY TASK 6) SCR PW APM TASK JOB 			

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7) SD EWL BACKGROUND JOB 8) SD WAIT LIST TRANS TO AAC 9) SD-PAIT TASKED TRANSMISSI 10) SDAM BACKGROUND JOB			