

Success Formula

DR Systems Scheduler Implementation

Successful implementations require a dedicated team, a clear set of goals, as well as excellent communication and collaboration between vendor and customer. DR Systems' proven formula for successfully implementing Scheduler requires extensive customer participation.

To assist you in organizing your team and tasks, we provide a checklist of your required goals.

By completing all of the required items on the checklist, you can ensure your success. We also encourage you to complete all of the recommended items as well.

Note: DR Systems is very serious about ensuring the quality of your Scheduler implementation. The required items on this checklist must be completed in a timely manner - or the project will be put on hold.

1 Project Information

Site Name:		Date:	
Main Contact:		Title:	
Contact Number:		Project ID:	

2 Required Tasks

The following tasks are required to initiate and implement your DR Scheduler project.

	Complete	Required Task	Details	
2.1	<input type="checkbox"/>	Develop a Project Mission Statement.	For example: Our Mission for this project is to streamline the scheduling process to improve our communication with referral sources and provide our patients with better service.	
2.2	<input type="checkbox"/>	Appoint leadership, assign individual responsibilities and establish accountability.	Please indicate key team members below:	
			Scheduler Administrator (required):	
			Scheduler Super Users (minimum 1 for each site):	
			HL7 Analyst (for interfaces):	
		Other:		
2.3	<input type="checkbox"/>	Complete the DR Systems' <i>Need to Know List</i> form and return to your DR Systems project	Identify all key team members names and email addresses.	

	Complete	Required Task	Details
		manager.	
2.4	<input type="checkbox"/>	<p>Document anticipated changes in personnel and changes in job descriptions.</p> <p>How do you foresee the implementation of DR Scheduler affecting your staff and their job duties?</p> <p>Does your core implementation team include individuals that you do not plan to keep in your organization long term?</p>	<p>Update job descriptions.</p> <p>Prepare materials for testing and monitoring your employees' compliance with new procedures and policies resulting from this project.</p>
2.5	<input type="checkbox"/>	Read and study documentation provided on the DR Resource Center.	<p>Your project manager will provide you with a list of required reading.</p> <ul style="list-style-type: none"> ▪ Scheduler Administrator has read all required documentation. ▪ Other staff has read all required documentation.
2.6	<input type="checkbox"/>	Take online DR training tutorials available on the Training Kit CD and on DR Systems' Resource Center.	<p>Your project manager will provide you with a list of required tutorials.</p> <ul style="list-style-type: none"> ▪ Scheduler Administrator has taken all required tutorials. ▪ Other staff as necessary has taken all required tutorials. ▪ Send confirmation to your DR Project Manager indicating who has completed which tutorials.
2.7	<input type="checkbox"/>	<p>Gather current information for Scheduler Templates and Surveys.</p> <p>Work with your DR Project Manager to review and edit this data as appropriate for your facility.</p>	<p>Provide DR with all necessary documentation to build and configure the Scheduler application, including but not limited to: Facility Information, Suite, Modalities, Exam Type Codes, Exam Type Durations, Service Codes, Scheduling and Prep Notes, Cancel & Reschedule Codes, Scheduling Resources, Referring Physician data, and Insurance Plan data</p> <p>Allocate a minimum of three to four weeks to complete this task.</p> <ul style="list-style-type: none"> ▪ Plan to complete this task far ahead of your anticipated go-live. ▪ Do not start this task until you understand how the system works.
2.8	<input type="checkbox"/>	Review the Statement of Work (SOW) with your DR Project Manager	
2.9	<input type="checkbox"/>	Schedule weekly, conference calls.	The core Scheduler Team must be involved in this task!

3 Recommended Tasks

DR Systems strongly recommends that you consider the following tasks.

	Complete	Recommended Task	Details
3.1	<input type="checkbox"/>	Document your current Scheduling and Registration workflow.	By analyzing your current workflow, it is entirely likely that new and better ideas for improving that workflow will surface <ul style="list-style-type: none"> ▪ What manual processes can you eliminate? ▪ Where do most of your errors originate?
3.2	<input type="checkbox"/>	Document anticipated Scheduling and Registration workflow post-DR Systems Scheduler implementation.	
3.3	<input type="checkbox"/>	Prepare for third party interfaces.	If you are planning to interface to a third-party vendor for ADT, Orders, Billing or other, alert DR Systems to that plan and request a conference call with key players to discuss specifics regarding the interface, costs, projected timelines, etc.
3.4	<input type="checkbox"/>	Prepare and plan for testing the Scheduler configuration once they are complete.	Allocate a minimum of three weeks to complete this task.
3.5	<input type="checkbox"/>	Prepare and plan for on site Super User Training.	Define who will have access to make administrative changes to the DR Scheduler. (Procedure durations, open and close hours for suites and facilities, Scheduling questions, Prep Notes, etc..)
3.6	<input type="checkbox"/>	For tips and helpful advice, and to see another user's workflow, visit a site that is already using DR Scheduler.	Review exam types: Prepare Scheduling Questions and Prep Notes by Modality, Procedures (exam types), and/or Facility.
3.7	<input type="checkbox"/>	Prepare and plan for Staff Training	All staff that will use the DR Scheduler should be trained by the Super Users at least a couple of weeks prior to go-live.
3.8	<input type="checkbox"/>	Prepare and plan for entry of existing appointments.	Develop a plan to enter existing appointments (from old RIS or paper book) to your new DR Scheduler. This task is frequently scheduled to begin on a Friday night prior to a Monday go-live and continues through the weekend until complete. Include in the plan: <ul style="list-style-type: none"> • When – specific times • Where – location of workstations to be used to enter appointments • Who – Schedule staff to be available

4 Getting Help and Information

4.1 Access to Help and Documentation

<p>Displaying Online Help</p> <p>Display a comprehensive Help program:</p> <ul style="list-style-type: none">▪ Press F1 or click Help Topics from the Help menu.	<p>Accessing the Resource Center</p> <p>View and download white papers, user guides, TechNotes, technical specifications and other documents:</p> <ul style="list-style-type: none">▪ Go to www.dominator.com▪ Click the Resource Center button.
<p>Contacting DR Systems Customer Support</p> <ul style="list-style-type: none">▪ Phone: 1-800-794-5955▪ Fax: 1-858-625-3337▪ E-mail: drsupport@dominator.com▪ Online: www.dominator.com Click Customer Support Login	