

DAISY Scheduling: ADDING PARTICIPANTS TO CLINIC TRACK

(Do Before Postcards)

On the 5th of each month (do on the same day as sending out postcards), subjects that are due in 3 months need to be added to clinic track so we can start the scheduling process (postcards get sent). Subjects due the next month need to get their interviews ready for their upcoming visit. To add the participants to clinic track, follow the procedure below:

- In the online DAISY database, go to the scheduling tab on the left-hand side → clinic track tasks → click to add records
- A list of participants who are due in three months will pop up
- Check stored procedure updates (for a limited time): Go through the participants who are on the 3 and 6 month protocols and check that a call record was added for everyone who needs an annual update interview
 - To decide if an interview is needed, look up the participant and look at the call date of their last interview. If it has been a year or close to it (remember this is from three months out) and a call record has not been added, click on “add new call record”
 - If you accidentally exit out of the list of clinic and call track records, you can bring it up again by going to go to the scheduling tab on the left-hand side → clinic track tasks → view new clinic and call track records added today
- Check any Every Year participants who did not receive a new call record today. Add a call record if needed.
- After you have finished checking call records, go to S Drive → DAISY → DAISY DATABASES → ChartClinicPrep → Add Clinic / Call Track → Print next month’s Annual Update → Wait for query to load → Print
 - Note the total number of cover sheets in the report. You will need to print this many annual interview packets in a later step
- Click “yes” for all prompts when exiting the database
- Staple an interview to each “Update Interview” cover sheet.
 - Interviews are found in S:\DAISY\DAISY MOO\PRA Training Documents\Chart and Scheduling Materials → “Interview”
 - Print to front desk
 - Choose “Offset” option in “Advanced” tab on printer (or under Properties/MyTab)
 - Choose double-sided printing
 - DAISY printer code: **28951**
- Take the stack of prepared interviews to the basket in the file room “DAISY to be filed”

- Notify appropriate staff that postcards can now be sent by mail