

DAISY Daily Chart Preparation

All DAISY (Regular/OGTT/TrialNet-OGTT) Charts need to be prepared the day before the scheduled appointment. All OS DAISY charts need to be prepped a week prior to the visits (see bottom of this page for instructions). It's typically best to prepare the charts in the afternoon as some parents will call to cancel in the morning. If you're going to be out for several days (say Friday and Saturday), prepare the charts on Thursday afternoon for Friday, Saturday, and Monday. Use the following procedure to prepare charts:

- Go to the online Daisy Database at <http://daisy.ucdenver.edu/Login.asp>
 - o On left side of page click Scheduling → Daily Schedule → Enter the date that you're preparing charts for → View Clinic Schedule → Print out this list → highlight all DAISY visits
- Go into the records room and pull all charts needed
- To print clinic visit, family structure, and CGM/Accelerometer sheets, go to:
 - o L Drive: DAISY Databases: ChartClinicPrep: Daily Clinic Visit Sheets
 - o Enter the date AFTER the date you are preparing charts for
 - EX. If you are preparing charts for 3/28/2017, enter 3/29/2017 for "schedule date"
 - o If there are any names on the CGM/Accelerometer tracking sheets, print them off.
 - If there are no names listed on these sheets, close out these windows by clicking on "Close Print Preview"
 - o Print off the Clinic Visit Sheets
 - Highlight what type of FFQ (located on bottom of sheet) they will be needing in their chart
 - Highlight "Collect 4 QC's" if participant is on fast track
 - o Print the CEDAR Vitamin Questions on back of all Clinic Visit sheets
 - L:\DAISY MOO\PRA Training Documents\Chart and Scheduling Materials "CEDARSX&24hrVitQuestions"
 - o Print out Family Structure Data Sheets
- Go through chart and take out old family structure data sheets (shred), clip together interviews, old clinic visit sheets, positive forms, and tanner forms (if completed Stage 5, staple and file in Iron Mountain box in file room)
 - o Other forms: Keep most recent Positive History Report (shred the rest) & most recent CGM results (shred the rest)
- Stack the old forms behind the "Interview To Be Completed In Clinic"
- If an interview is not in the chart and should be (if it's been 1 year since previous interview was completed), go to:
 - o Online DAISY Database → Scheduling → Enter Subject ID → Call Record → Make sure there is a call record added → If there isn't, click "Add New Call Record"
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- Then, go to L:\DAISY DATABASES → ChartClinicPrep → Add Clinic/Call Track → Print Ann Updt Indiv → Enter date that interview is due (use date due for NEW call record just made in previous step and enter this date three times), enter ID (enter this ID twice), print
 - Staple this cover sheet to an interview questionnaire
 - Paper clip a pink “INTERVIEW TO BE DONE IN CLINIC” sheet
- In front of interview stack from front to back:
 - Consents if needed (every 5 years and at 18). Include Assent if participant is under 13.
 - Pamphlet (for 15 or older- check under Contact tab to see if they’ve already gotten one)
 - Accelerometer/CGM form (with consents and W9 if necessary)
 - If Accelerometer Eligible (but not enrolled) include Accelerometer packet (cover sheet, consent/assent, blank CGM/Accelerometer sheet, W9)
 - Clinic Visit Sheet (with CEDAR Vit Questions on back)
 - Family Structure Data Forms
 - YAQ for kids over age of 9.5 (if needed: you can check under FFQ/Filter Paper → Diet Survey Data Entry)
 - OR Blue FFQ for kids under age of 9.5
 - Tanner Form with cover sheet for kids over 8 (Blue for boys, Pink for girls)
 - Don’t include if visit sheet says “Tanner Stage Not Needed”
 - If last Tanner stage in chart is marked “5”, please staple all Tanner forms together and give to Kathy Waugh or leave in KW mailbox
 - If at least 18 yr old and “Appreciation Gift Given” field is empty (Subject tab), attach a sticky-note reminder to Clinic Visit form (indicate “Offer Gift”)
- If there is no face sheet on left inside of chart, print one off at:
 - Online DAISY Database (address in step 1)
 - Contact Tab
 - Scroll down to “print an updated face sheet” and print
 - Tape this to left inside of chart
- **DAISY OFFSITE CHART PREP:**
 - Go to S:\BDC\DAISY\DAISY DATABASES\ChartClinicPrep -> click on the “List of Off-Sit DAISY” button which will pull up a list of OS participants 8 days in advance.
 - NOTE: Under room value column there will be participants who are being seen at the “Youth Clinic” which is an OS Fort Collins visit and needs to be prepped. The name may change if Rachel can get to it.
 - Print List (Keep list in purple binder at front desk)
 - As participants of OS list is made please email clinicians and fellow front desk ladies which charts have already been prepped.
 - Cross off those participants from the list.