

Record Tracking (RT) Setup Checklist

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
1. The Computer Site Manager Option will be utilized to initialize the Record Tracking Program.			
A. Prior to defining overall site parameters for Record Tracking, be sure all devices to be associated with Record Tracking are defined in your DEVICE file (3.5)			
B. Prior to assigning menus to users, the DIVISON field of the New Person file (#200) must be defined for each user of Record Tracking.			
2. The Systems Definition menu of the Record Tracking package will be utilized to set all parameters necessary for MAS and Radiology related medical record/film file rooms. Applications, file rooms, records, borrowers, must be defined for Record Tracking to work appropriately. User will require the RT MAS FR SUPERVISOR security key			
3. Listed items are for consideration prior to Record Tracking parameter setup			
A. Review the Record Tracking User Manual			
B. What records do you wish to track? Only medical records or medical and administrative records? Only master jackets or all types of radiology records?			
C. What file room(s) do you wish to track records from? Do you wish to track records from inactive file rooms as well as active ones?			
D. What admitting/imaging areas should be included in your set-up? A Radiology department may have multiple imaging areas (i.e., Ultrasound, Nuclear Medicine, and Diagnostic) and wish to track records from these areas separately. If this is the case, each must be defined in			

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your system.			
E. Do you wish to use the standard label formats which accompany this package or format your own? (Samples of the standard labels may be viewed in the Label Formatter Section of this guide.)			
F. A major part of the installation process is the definition of record borrowers; i.e., clinics, wards, physicians, clinic clerks, other individuals, other areas, etc. There will probably be a number of borrowers in your system making this a time-consuming effort. It is very helpful if all borrowers are identified prior to commencing with this process.			
G. If you are installing Record Tracking for the MAS application, attention needs to be given to records which will be requested for clinics and the admitting area. For these areas, you should establish a general rule of thumb as to what records need to be routinely requested; i.e., the latest volume of the patient's medical record. This will be defined through the Application Set-up or Admitting Area Set-up options, as applicable. You should identify those clinics/admitting areas who will need other than the default records. Some clinics may require ALL volumes of a patient's medical record; x-rays may be required; if so, which x-rays should be requested for which clinics?			
H. As part of the initialization process, the Site Manager will perform a BORROWER INITIALIZATION (using the Borrower Initialization option, Computer Site Manager's Menu). This process looks at the HOSPITAL LOCATION, WARD LOCATION, AND NEW PERSON files, and places all "active" clinics, wards, and persons in the BORROWER/FILE AREAS file, making them			

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<p>eligible to become actual record borrowers. It is the first step in initializing borrowers. You may not wish to have ALL of these entries become actual borrowers in the Record Tracking system, however.</p>			
<p>I. In order to activate them as borrowers, they need to be defined through the Borrower Set-up option, taking into account the above considerations. Although you will have defined DEFAULT RECORDS TO BE REQUESTED through the Application Set-up or Admitting Area Set-up options, it is necessary to define the records needed for each of these types of borrowers when entering them in the Borrower Set-up option.</p>			
<p>J. Each individual who will be a borrower should also be defined by name through the Borrower Set-up; i.e., ward clerks, clinic clerks, secretaries, etc. As long as these individuals are part of the PERSON file, they may be activated as borrowers through this option. You may have certain areas of your facility which are not defined in either the HOSPITAL LOCATION, WARD LOCATION or NEW PERSON files; i.e., Correspondence Unit, Medical Information Section, Details Clerk, etc. In order to enter areas such as these, it is necessary for them to be defined in the appropriate file. See your site manager to accomplish this task.</p>			
<p>K. How do you wish to handle printing of barcode labels? All at once or as patients report for care? If printed all at once, labels for inactive patients will be included in the run. (The system checks for expired patients and does not run labels for them.) The additional labels printed for inactive patients may outweigh the benefits of having your file room bar-coded in the shortest amount of time.</p>			

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L. Who should receive what security keys?			
4. You are now ready to begin defining the parameters for your application. You should begin with File Room Set-up.			
A. NOTE: The first file room must be defined with the site manager using the RT OVERALL Menu. Subsequent file rooms may be defined using the RT MAS/RAD SUPER Menu.			
B. Define parameters in the following Systems Definition Option			
1) File Room Set-Up 2) Label Formatter 3) Type of Records Setup 4) Application Setup (for MAS and RAD)			
C. Additional parameters will include			
1) Reasons File Setup to determine allowable reasons for cancelling request, missing records and associating them with the function for which they may be used, i.e. you may wish to enter Not Charged Out as an allowable reason for a missing record			
2) Borrower Setup – option defines approved borrowers, individual and clinic			
3) Movement Type Setup – Used to change parameters for various movement types in your application			
4) New labels will need to be created for all charts/x-rays Labels for all new medical, administrative and radiology records will be created, attached to the records and the records will be charged into the appropriate file room.			
5. Security Keys 1) RT MAS FR STAFF 2) RT MAS FR SUPERVISOR			

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3) RT MAS-FR-STAFF 4) RT MAS-FR-SUPERVISOR 5) RT RAD FR STAFF 6) RT RAD FR SUPERVISOR 7) RT RAD-FR-STAFF 8) RT RAD-FR-SUPERVISOR			
6. Background Jobs 1) RT-SM PURGE-AUTOMATIC			
7. Mail Groups 1) RT CLINIC REQUESTS 2) RT MISSING RECORD			