PREPARING FOR THE MD OFFICE VISIT CHECKLIST:

ITEM	NOTES
☐ **Do you have cert installation instructions?** Copy can be left with user.	You should have received cert installation instructions during the SCOR implementation.
☐ **Do you have cert server login credentials as well as certcode?**	You should have received cert server login credentials and cert-code via fax during implementation. You can also get your certcode by left clicking on the SCOR messenger system tray icon and selecting Certificate Instructions.
☐ **Do you have copy of the SCOR end-user guide for user?**	You can get the credentials to log in to the SCOR Certificate Server by calling SCOR Support (888.463.9058).
☐ **Do you have copy of the SCOR promotional flyer for user?**	End-User guide can be downloaded from the Document Library. Promotional flyer should have been mailed to you.
☐ **Has the user's account been created?** Do you know initial password? Is account set to change password on login and do you know initial password?	From admin tools / manage user / click on user's account to modify, or click "add user" to create new user.
Have you logged in impersonating user and reviewed their scheduling environment?	This helps to reduces surprises. Have you confirmed their access to block or group block times?
☐ **If using preference cards, have you created for the user's physicians?**	Recommend creating for MDs frequent procedures (though not required). …You can also create just a few and then add others later as needed or requested.
☐ **Do you know what to tell the user if they need to make a change a request or send additional case information?**	All change requests are done through messaging.
☐ **Have you reset user's environment if you have sent any messages or requests under their user account?**	You can do this by sending "@RESET USER" message to (or from) the user's account.
☐ **Is someone ready in the surgery center to process hold requests or messages sent during training?**	You will want to have a quick response when you are in the MD office.
☐ **Have you updated your Announcements and/or Document Library?**	It's good to show how they can download facility forms, and posting an announcement about it is a good way to demonstrate how they will know when a new or updated form is available.