Compass

Implementation Checklist for Office Administrators

The purpose of this checklist is to assist you in assessing the state of staff in transitioning to COMPASS. Listed below are actions to take and resources for closing any gaps. All materials referenced on this page can be found on the COMPASS Help Page of DoctorLink (www.doctors.seton.org/CompassHelp).

STAFF TRAINING

- ❑ Make sure all staff who will use COMPASS complete the *COMPASS Training for Medical Office Personnel* lesson.
- ❑ Complete the *COMPASS Competency Worksheet* for each staff member.

COMPASS USE

- ❑ Use the *COMPASS Account Request Form* to obtain accounts for all staff members who will use COMPASS. Note: It is a violation of HIPAA for individuals to use another person's account to access COMPASS.
- ❑ Establish clear performance requirements with staff to use COMPASS.

SUPER USER STATUS

- ❑ Designate a Super User to brief staff on changes.
- ❑ Add a COMPASS item to your staff meeting agendas for Super User to brief the staff.

Resources:

- COMPASS *Tips and Tricks* are issued to COMPASS users monthly and outline any improvements made in the system during that time. To receive the *Tips and Tricks*, send an email entitled "COMPASS Updates for Medical Offices" to compassinfo@seton.org.
- If you have questions about COMPASS, please call the Seton ServiceDesk at 512) 324-1675. Calls will be routed to the appropriate person based on your need.