RECOMMENDED BEST PRACTICES

ONE MONTH BEFORE

- **Brief your health staff:** Make sure your health staff are familiar with our application, particularly the eMAR, health log, filtering, and reports.
- **Review accounts:** Decide who from your team needs to be part of the profile review process and what review categories you need (e.g. general, medical).
- **Review completed records:** Check completed records to make sure all documents look legible and up-to-date. Contact any participants who need to update forms.
- **Check for unlock requests:** Participants who need to update their health information will need to request that you unlock their profiles, if their session is past the lockout date. If you approve an unlock request, make sure to review what updates were made.
- **Look for red flags:** Look for any red flags (e.g. no asthma medications listed for participant with history of asthma), and contact families to provide additional details.
- **Consider your notes categories:** Notes serve as a kind of electronic sticky note that you can use as an internal communication tool.
- **Adjust email notification frequency:** Increase the frequency of reminder emails to help encourage families to complete their accounts.
- **Reach out to families:** Send personal emails or call families who have not started completing their accounts.
- **Upload paper forms:** If you've collected any paper forms from families, make sure to upload them into each participant's health profile before the first day.
- **Add locations:** You can customize the health log by adding locations and dispositions specific to your organization.
- **Update with any changes:** Make sure to update your account with any participants who change or cancel sessions, as well as merge any duplicate profiles.