SAFE BALANCE

Launch Day Checklist v2025

SAFE BALANCE – Launch Checklist

Complete the following items when launching a new account

Part 1 – HARDWARE AND SITE SETUP *(this step can be completed on a day prior to going "live')*

- ❑ Setup tablets and connect them to the site's protected WiFi network. Log into the software with the account's username/password.
- ❑ Check for Safe Balance "shortcuts" on the client's computers (bookmarks). If not there, add shortcut of Safe Balance web app on the desktop/laptop computers of the site. Log into software with the account's username/password.
- ❑ Add signage, education materials, etc to assigned locations around the clinic.
- ❑ Confirm "Inclusion Criteria" for the program with practice admin/providers.
- ❑ Check and ensure patient names are uploaded into Safe Balance software by searching for a few patients by their last name.

Part 2 – ESTABLISH, DOCUMENT AND WALK-THROUGH WORKFLOW:

- ❑ **Workflow Description:**
  - ❑ How will Safe Balance patients be identified (sticker, note on chart, checking queue, etc)? ____
  - ❑ Screening/Patient Mode completed by ____________________ in _______________________ (clinic location)
  - ❑ Completion of assessment/balance tests completed by _________________ in ___________________(clinic location)
  - ❑ Notation for procedure inserted into encounter note by ______________________
  - ❑ Procedure billed by ___________________________
  - ❑ Results given to provider how (printed, inserted in note, etc)?
  - ❑ Education materials (handouts, signs in exam room, etc) presented to patient how/when? ____
  - ❑ **COMPLETE WALKTHROUGH OF WORKFLOW WITH ADMIN TO ENSURE ACCURACY**

Notes on the Workflow:

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Part 3 – TRAIN STAFF RUNNING PROGRAM (Traditionally in Order: Providers – Clinic MA Staff – Front Desk :

- ❑ **Provider**:
  - ❑ Refresh on what "Safe Balance" is and the patient's being assessed (inclusion criteria).
  - ❑ Describe the workflow and train the provider on what is happening from start to finish. Let the provider know how they will be alerted on a Safe Balance patient (sticker, chart, EMR, etc).
  - ❑ Go over a sample report (a good idea to print one out as a sample) and what it means to the provider (risks, suggested interventions, etc)
  - ❑ Go over where the reports can be found and let them know where to expect them based on the workflow:
    - ❑ Inside encounter note (note created from software)
    - ❑ Inside Safe Balance software (Recent Exams button)
    - ❑ Printed and given to Provider
  - ❑ Reinforce that all patients will receive education and non-skilled mitigation pathways in line with CDC recommendations.
  - ❑ **Reaffirm billing template/procedure is in place to bill for assessments. If not, do not continue until this is completed to ensure timely and accurate billing.**

- ❑ **MA Staff:**
  - ❑ Refresh on what "Safe Balance" is and the patient's being assessed (inclusion criteria).
  - ❑ Describe the workflow and train the staff on what is happening from start to finish. Let the staff know how they will be alerted on a Safe Balance patient ("Green Queue", sticker, chart, EMR, etc).
  - ❑ Train on how to recall and complete an assessment (if started at front desk) -or- how to start the assessment (if whole assessment is being completed in the clinic area)
  - ❑ Train how to perform the SLS and TUG (if needed) and go over when to complete those tests (IE "before you sit down, we need to perform a quick balance test"). Train when "unable" is the appropriate choice to select on the balance tests (IE unsafe, unable, in wheelchair, etc)
  - ❑ Train how to complete the exam (entering scores, units, etc)
  - ❑ Train how to complete the note with the "Note" feature to copy/paste into the daily note for documentation
  - ❑ **If MA is entering code for billing, make sure to go over that with the staff. If not, train the provider to ensure accuracy.**

- ❑ **Front Desk Staff:**
  - ❑ Refresh on what "Safe Balance" is and the patient's being assessed (inclusion criteria).
  - ❑ Describe the workflow and train the staff on what is happening from start to finish. Let the staff know how they will be alerted on a Safe Balance patient (Queue, sticker, chart, EMR, etc).
  - ❑ Train how to begin an exam from the Queue –and/or- Train on how to recall a patient (patient search), how to select the patient, select the appropriate exam type, and **ENTER PATIENT MODE**.
  - ❑ If patient can't be searched (no file created), train how to create a new patient.
  - ❑ Reinforce that the program stalls if the first part isn't completed so emphasize **NOT** missing patients.

Training NOTES:

Part 4 – SET THE QUEUE BASED ON THE INCLUSION CRITERIA and RUN THE PROGRAM:

- ❑ Look at the schedule and identify what patients are in the inclusion criteria for the remainder of the day. Look them up in the software and add them to the queue with the appropriate queue parameters (location, provider, assessment type).
- ❑ Stay at the front desk area and run the program when patients begin checking in. Make sure they complete the screening questions when checking in. Have the front desk continue with the remaining patients in the queue.
- ❑ Follow the first patient back to the MA to complete the assessment and document appropriately. Alert the staff that patients will be continuing to run through the program and to be looking for them.
- ❑ Ensure that the provider is completing the process and that the procedure is appropriately billed.
- ❑ Observe the process from start-to-finish for several patients and support as needed.

Part 5 – PERFORM CLOSEOUT WITH PRACTICE MANAGER/ADMINISTRATOR:

- ❑ Go over what happened in training, and list the personnel who were trained and demonstrated the program from start to finish
- ❑ Go over the workflow and emphasize the importance of making sure inclusion criteria is being followed
- ❑ Discuss the importance of the 60-day onboarding period:
  - ❑ Make sure volume is up
  - ❑ Make sure inclusion criteria is being followed
  - ❑ Watch for disruption (IE "I forgot to do it" or "I don't have time" by staff)
  - ❑ Reinforce the importance of accurate billing
- ❑ Log into portal and ensure that the practice admin/manager/billing team have codes accessible to the site
- ❑ Go over the portal and all features on it. Explain the importance of frequent checks to ensure <u>all</u> assessments completed have been properly billed
- ❑ Go over the resource page and make sure the staff is aware of the resources available (training, materials, etc)
- ❑ Emphasize the importance of communication to the rep and account management team so we can assist if any problems rise up

❑ ***<u>Complete the Launch Closeout Form</u>***

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Staff Trained on SAFE BALANCE:	Providers Trained on SAFE BALANCE:

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