AIMS Caseload Tracker Launch Checklist

This checklist outlines the steps to get started using the AIMS Caseload Tracker. It typically takes each person about one hour to learn and practice using the registry. The timing of this technical training is important: it needs to happen after your team is familiar with evidence-based integrated care principles and understands how and why a registry will be used in the context of clinical workflows. The technical training should happen about a week prior to launch, so that the details are fresh in everyone's mind when they begin enrolling and tracking patients.

Get Started	✓
Sign and submit the software license agreement. Step-by-step instructions can be found here. You will designate an Account Admin who is responsible for creating and managing user login accounts for your team.	☐
The AIMS Center will reach out to the Account Admin within 1-3 business days to begin setup. We will configure the registry for your organization, such as the format of acceptable MRNs, which scales to use, and whether to track minutes.	☐
Account Administrator Training (about two weeks prior to launch day)	
The AIMS Center sets up login access for your Account Admin on both a training site and the real site.	☐
The Account Admin completes self-paced training by reviewing videos and user guides, and practices entering fake patient data.	☐
Team Training (about one week prior to launch day)	
The Account Admin creates training accounts for Care Managers and Psychiatric Consultants and distributes login information and training materials using the provided templates.	☐
All team members complete self-paced training by reviewing videos and user guides, and practice entering fake patient data.	☐
The Account Admin creates real accounts for all team members and distributes login information using the provided templates.	☐
Launch Day	
Care Managers begin enrolling patients. Any existing patient information may be transitioned from another source by back-entering the first and last PHQ-9 scores for currently active patients.	☐
Post-Launch Support	
Users should direct any questions to their Account Admin, who may escalate to the AIMS Center as needed by emailing aimstech@uw.edu. The AIMS Center sends monthly email notices to the Account Admin when the registry is updated with enhancements or bug fixes.	

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