



Onboarding: Physicians & Physician Practices

How do I get Physicians and their Office Staff set up for the first time?

Initial set-up

Physicians and Office Staff

For initial set-up of Physicians and Physician Office Schedulers, complete the following prior to the training session with your Casetabs implementation manager:

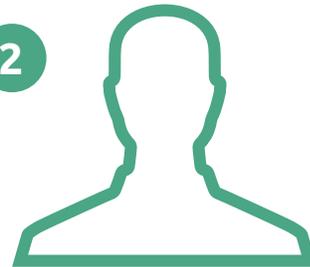
1



Obtain Email Addresses

Obtain email addresses from all Physicians and Physician Offices

2



Designate Super User

Identify one champion user from each Physician Office to be the "Super Admin" for their office

3



Complete Spreadsheet

Complete the spreadsheet provided by Casetabs and return to your implementation manager

4



Send Out Casetabs Introduction

Send out appropriate Casetabs introduction email (see next page) with corresponding quick start guide attached.



Email Template for Inviting Physicians & Physician Practices



Note: For the following sample email, fill all **[bolded]** text with the appropriate information.

From: Facility Administrator or Scheduling Lead

To: Physician Practice Schedulers

CC: Surgeons

Subject: PLEASE READ: [XYZ Surgery Center] introducing Casetabs for Enhanced Case Schedule Communication/Coordination

Dear [XYZ Surgery Center] Physicians and Schedulers,

[Surgery Center XYZ] will begin using a new app called Casetabs (www.casetabs.com) to communicate around our surgical case schedule. Instead of receiving day-of schedules by fax, you will be granted access to a web- and mobile-based app that provides a real-time view of all your surgical case schedules that are booked at our facility.

Before getting started, please set up your Casetabs account with these easy steps:

- Check your email for an invitation from Casetabs to activate your account.*
- Click on the secure link provided in the email to create a password and set up your profile.*
- Check out Casetab's [Quick Start](#) and [video guides](#).*

What can Casetabs do for you?

- Streamlined communication for all changes and updates made to case schedules*
- A HIPPA-secure portal for sharing documents electronically, instead of faxing. This means no more lost or illegible documents!*

If you have questions about Casetabs, their [Help Desk](#) is a great resource, or you can contact them at support@casetabs.com.

[Your name]

[XYZ Surgery Center]