**Planning an Initial SMA checklist**

**(1-4 weeks from SMA)**

Date of SMA:

SMA Name:

Clinician:

Facilitator:

Administrator:

|  |  |  |
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| **What** | **When**  | **Completed √** |
| Admin |
| Book room |  4 weeks |  |
| Organise catering/refreshments | 4 weeks |  |
| Enter the screening term for each patients to monitor patient preparation checklist | 4 weeks |  |
| Prepare the patient information package* confidentiality forms
* SMA information
* Patient education materials
* Patient self-management record
 | 2 week |  |
| Send patients SMA information | 2 weeks |  |
| Nurse |
| Organise patient tests/diagnostics | 4 weeks |  |
| Prepare and print any patient handouts/clinical information for patient package or as group handouts | 2 weeks |  |
| Update care plans and patient notes | 2 weeks |  |
| Prepare patient files | 1 week |  |
| Record tests and diagnostics in Pt notes | 1 week |  |
| Run screening term query and follow-up patients who have not completed activities. |  |  |
| Patients |
| Complete pre-SMA tests and diagnostics | 2 weeks |  |
| Make time available for the SMA | 2 weeks |  |
| Think about questions for their consultation | 1 week |  |
| Organise a support person if necessary | 1 week |  |
| Read patient information package and sign confidentiality form | 1 week |  |
| Clinician |
| Select patient group (25-30) | 4 weeks |  |
| Phone patients for first SMA | 2 weeks |  |
| Order pre-SMA tests and diagnostics | 2 weeks |  |
| Decide which patients may need a physical examination prior, during or post SMA. | 1 week |  |