



New Customer Action Plan (Installation Process Overview)

Version 7

This plan/checklist can help you see all aspects of the process needed for successful setup, installation and training of your new ExitCare software. Please read through this document completely and call ExitCare (800-694-6669) if you have any questions.

Note: This document, and all attachments listed, is available for download at:
http://www.exitcare.com/pdf_files/tech_supp/Installation_Process_Overview_V7.pdf

Action Step		ExitCare Action	Customer Action	Status Pending, Complete Or N/A
BEFORE INSTALLATION				
1	Complete all paperwork including signing two copies of License Agreement and Purchase Orders . If you are planning on utilizing ExitCare to perform on-site installation, a separate Purchase Order is sometimes required for this expense.		x	
2	Decide which Departments will be using ExitCare. ExitCare has patient instructions for most departments, and one license fee covers facility-wide use. Some facilities choose to just implement in the ED first, and roll out to other departments later, but this should be planned for, especially if Super Users (see below) will be trained as part of the initial training.		x	
3	ExitCare will provide you with a Logo/Layout document (Attachment A) to initiate layout design work. Generally, Customer will submit, via e-mail to logos@exitcare.com , digital logos and other information needed for this customization, including Customer Point of Contact information.	x	x	
4	If HL7 Interface has been ordered, Customer fills out HL7 info documents (Attachments B and C) and returns (with sample data) to hl7@exitcare.com for ExitCare prep. Before time of ExitCare installation, Customer must call ExitCare (800-694-6669, ext 2) to schedule the HL7 install and setup at time of ExitCare install.	x	x	

5	Decide on what printers will be utilized to print ExitCare instructions and prescriptions (if ExitMeds licensed). Color greatly enhances the patient impact and therefore patient compliance, but the choice to print in color is yours. If you choose to print in color, check out Attachment D which lists our Recommended Printers and provides additional information to consider, such as printing scripts from a different tray.		x	
6	Although you can manually enter in data for both Attending and Follow-Up Caregivers (2 separate data tables), ExitCare allows you to import an Excel spreadsheet. For the format for this database, see Attachment E . Call us for additional support if necessary when you are creating your caregiver database.		x	
7	Most sites, due to HIPAA concerns, will want to set up Security . You can control access to up to 10 different areas (45 separate security access settings) of ExitCare by User Name and Password. For example some facilities do not allow anyone but a physician to generate a prescription, others allow RN's to generate prescriptions for physician signature. Group passwords are allowed, but they make auditing who generated specific instructions impossible. Individual Users can customize some features for their own, personal use (e.g., drug defaults, custom title lists, etc.), but only if individual Users have been set up. See Attachment F for a complete listing of the security options.		x	
8	Decide on who will be the Super Users . Most sites restrict who has access to many parts of the Options Menu including setting default answers, deactivating documents from the title list, creating library of additional notes, setting drug defaults, etc. Each of these areas can be restricted through the Security System described above. But, at least one user per shift (and possibly per department), if possible, should be able to customize the program for users. Also, ideally at least one I.S./I.T. Dept. person should be a Super User. These Super Users will need to have more extensive training (see below).		x	
9	If On-Site Training has been ordered, schedule training with ExitCare at least two weeks in advance by calling 800-694-6669, ext 403. We will develop a customized training schedule with you based on the number of days that our trainer will be on location. The further in advance training can be scheduled, the greater likelihood your desired dates will be available. Also be sure to open Attachment K , a checklist to review for planning before the onsite installer/trainer arrives.	x	x	
10	Custom Rx and Patient Signature Forms are available upon request. Some States have specific requirements regarding information printed on prescription forms or what paper must be used to print schedule 2 medications. Be sure to contact your hospital pharmacy to verify what your requirements are. Contact ExitCare once you know of any special requirements. See Attachment J for specific information on printing prescriptions on security paper.	x	x	

11	Contact your I.S./I.T. Department to determine hardware and software requirements will be met. Issues include server accessibility, drive space and computer speed. See Attachment G for requirements information.		x	
12	If planning to Fax or E-mail prescriptions to pharmacies or documentation to follow-up caregivers, additional requirements need to be met. See Attachment H .		x	

INSTALLATION AND TRAINING				
1	Before installing ExitCare on the first PC, we highly recommend a short call to ExitCare Technical Support to discuss installation strategies. We will briefly discuss how the installation process is designed. The Installation Process is covered in Attachment I .	x	x	
2	Installation: (Note: MS-SQL must be set up first. See separate documents related to that process.) To install the ExitCare Server piece should take no more than 30 to 45 minutes. To install the ExitCare Client piece(s) should take no more than 10 to 15 minutes per client. <u>If the HL7 Interface is being installed</u> , an HL7/ExitCare installation (over the internet) appointment will have been arranged. This should take between 30 and 120 minutes.	x	x	
3	A complete User Manual (digital in PDF form) and an Inservice CD will be shipped with the program. Ideally, all users of ExitCare will have viewed the appropriate sections of the Inservice CD . Those that will be writing prescriptions will also want to view that section (Prescription System). <u>Super Users</u> will also need to view the appropriate sections. If the training can be completed in an area outside the normal work area (training room or classroom), users should be allowed to “play” with the software immediately after viewing the inservice; it greatly enhances the learning experience.		x	
4	At no charge, ExitCare will conduct a limited amount of Super User Training over the internet. Ideally, Super Users should have already viewed the inservice CD, and had a chance to “play” with the software. This internet based training takes up to 3 or 4 hours for training in the full program.	x	x	
5	Additional copies of the Inservice CD are available upon request. We can also provide “ Demo CD’s ” which contain a 30 minute demo inservice covering just the basics, as well as a complete demo copy of the ExitCare Program. If users are willing to train themselves at home, a Demo CD gives them all the software they need to learn the basics.		x	
6	Super Users should be available to help those who do not readily adapt to new computer systems or change easily. Most users require help generating their first or second instruction, but find by the third one, that the program is actually very intuitive to use		x	

SUPPORT AFTER INSTALLATION				
1	Customer Support is available 8 am to 5 pm Central time by calling 800-694-6669. All calls are welcome and there is no additional charge for support. After Hours support is available 24/7/365 for no charge for Emergency Issues. See our website under Technical Support for more information. Please encourage your users to call us, even with what they might think is a silly question. We want all users to be comfortable with the program.	x	x	
2	Suggestions?: The ExitCare product has evolved over the years because our customers have given us great suggestions on how to improve ExitCare. We welcome your ideas.	x	x	
3	Missing Title?: Occasionally, you might not find an instruction you need, even after using the search feature. Our Title List grows each quarter, mostly by customer requests. If you can't find an instruction you need, please let us know so it can be completed. If you need it, chances are someone else will, too!	x	x	

ExitCare strives to provide the highest level of Customer Support. Please call 800-694-6669 and let us know how we are doing!