Implementation Guide

PULSE™

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Overview

Your Pulse™ Implementation Manager will lead employees through a training program comprised of two individualized training calls and series of webinars designed to drive software and setup optimization.

This training program includes:

1. Employee setup and billable item optimization
2. Data audit (if applicable)
3. Calendar setup, forms and templates customization
4. Practice workflow analysis
5. Practice staff training
6. Go Live preparation and final migration expectations (if applicable)

Decision Makers

The first three implementation webinars need to have key decision makers attend to assist in the following:

- Data audit instructions for conversions
- Report any data migration issues
- Customize areas of Pulse to clinic specifications
- Ensure practice specific setup and workflows are discussed and implemented
- Question and answer opportunity

Keys to Success

Practices must adhere to the initial agreed upon timeline by completing all implementation webinars and action list items assigned. We forecast this process from initial data conversion completion to Go Live to be 65 business days.

Implementation

Project Launch

Within seven business days of the signed sales contract, an Implementation Specialist will reach out via phone and email, to the contact provided on the sales contract, with initial data retrieval instructions and scheduling. Once the initial data is obtained/received, please allow up to 14 business days for completion. In the meantime, the Implementation Specialist will provide you with links to our daily live webinars, as well as pre-recorded webinars so you can attend as your schedule permits, or listen to a recorded version.

Once the initial data conversion is complete, the Implementation Specialist will send an email with their direct scheduling link for the clinic to select a date and time for their data audit call.

The table below outlines the Training Roadmap, what is to be covered during the training process, and the clinic staff who needs to participate in each topic for the best success.

Type	Topics	Staff	Description
Webinar	Billables	Participants on the webinar are staff who will be setting up services and inventory items	Overview of Inventory, Lab, Services, and Package setup
Webinar	Appointment calendar	Participants on this webinar must be familiar with your clinic's appointment process	Overview on the use and setup of the Pulse™ calendar. Including appointment types, calendar resources, confirmation statuses, etc.
Webinar	Vaccines & Reminders	Participants on the webinar are staff who will be setting up the reminder system and vaccine schedule	A deep dive into the reminder and vaccines setup and creation
Webinar	Medical Records	Participants on this webinar are staff who are familiar with doctor exam forms (SOAP), and consent/discharge forms	Overview on navigating and optimizing your medical records
Webinar	Invoicing	Participants on this webinar are staff who will be entering charges and billing/taking payments	Overview on the use and setup of the Pulse invoicing system and invoicing tips

Type	Topics	Staff	Description
Webinar	Document and Forms	Participants on this webinar are staff who will creating/modifying the clinics documents and forms.	Overview of setup and customization of your exam forms, document & e-mail templates
Webinar	Check-in to Check-out/ Staff Training	The full staff is welcome to participate in this webinar	Overview of how the staff will use Pulse™ day to day, a Check-in to Check-out workflow overview
Webinar	Open Forum	Any Staff is welcome to participate in this webinar	Open session to allow for Q&A on Pulse
Call	Q&A	Key decision makers	Q&A session to ensure all questions are answered prior to Go Live
Call	Post Go Live Q&A	Key decision makers	A 30 min checkin to answer any questions you have encountered since Go Live

Go Live Preparation

In order to ensure the practice has everything in place for the Go Live date, the Implementation Specialist will cover the Go Live instructions, expectations and answer any last minute questions the clinic has. The Go Live preparedness document, sent via email, covers the following:

- Open invoice protocol
- Carry over balances
- Reporting protocol between systems
- Discontinued use of prior system
- Final conversion timing
- Third party integration setup
- Appointment calendar setup for Go Live day
- Appointment and patient reminder protocol
- Client and patient updating on final conversion and merging (if applicable)

Go Live Tasks

Before the Go Live date, complete the following tasks.

- Ensure all integrations, most importantly DYMO® Label Printers, and integrated labs are setup and ready to go the day before the Go Live date.
- Ensure all first and second day appointments for Go Live are manually entered into Pulse™.
- Ensure all pricing in Pulse is correct. Billable items will NOT be updated on the final data migration.
- In Pulse, add quantity on hand, lot numbers, manufacturers and expirations on Rabies vaccine inventory codes the night before or morning of Go Live for Rabies Certificate information.
- Ensure staff can login to Pulse and are prepared to solely enter data in Pulse as of the Go Live date.

Post Go Live Tasks

- Schedule 30 minutes post Go Live call with an Implementation Specialist to go over any questions, concerns, reports and potential conversion issues found.
- If a final conversion from a previous system was performed, confirm the following is correct:
    - ◊ Client and patient information
    - ◊ Reminders
    - ◊ Vaccination records
    - ◊ Attachments
    - ◊ Carried over balances (if brought over)
    - ◊ Converted appointments (if brought over)
- Within two weeks of Go Live, clinic confirms no issues to resolve with final migration data and the practice will move to the permanent production server. This step is for clinics converting data only.