Pulse Project Plan

COVETRUS PULSE™

TABLE OF CONTENTS

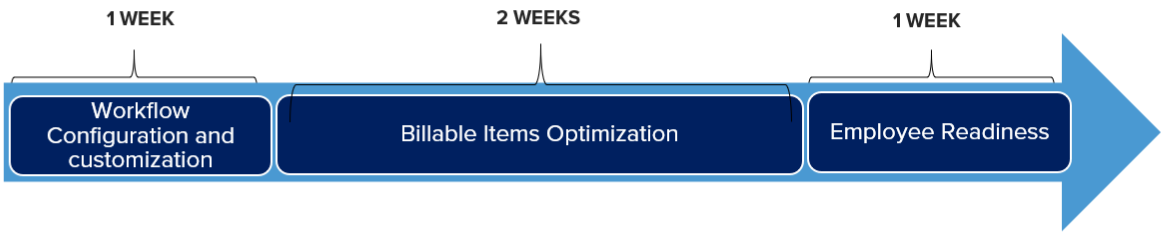
Executive Summary

The general goal of this training program is to drive software adoption and utilization with practices implementing the Covetrus Pulse Practice Management System.

Overview

This program consists of a series of webinars and six pre-scheduled training sessions:

1. Welcome call and general site settings (Overview of Pulse and Introduction to Webinars) (1 Hour)
2. Completion of Phase I webinars
    - Workflow Check-in (30 min)
3. Data Audit (1 hour)
4. Completion of Phase II webinars
    - Billable Setup Check-in (30 Min)
5. Completion of Phase III webinars
    - Final Q&A and Go-Live Readiness (1 hour)
6. Post-live Check-in (30 min)



Objectives

Prepare each practice employee with the tools and training needed to successfully implement Pulse.

Keys to Success

Practices must adhere to the initially agreed upon timeline by completing all training phases and homework as assigned. It is recommended employees watch the live webinars and/or on demand recordings. Employees should also implement learned features/tasks before the training call with their Pulse trainer in preparation to ask questions.

Pulse Webinar Program

Pulse trainers have recorded webinars to allow clients to review material at times and speeds that are most convenient to them. Practices may join as many webinars as desired, or view recorded webinars on demand. This allows individual practices to immerse themselves in a desired topic through each phase of implementation. We also provide regular “office hours”/ open forum webinars where staff can join to ask a trainer any questions they encounter as they work through the setup and webinars.

Phase I: Workflow Analysis & Configuration

Overview

The webinars will detail how you can customize and setup options to improve your workflow. Customization options including, but not limited to:

- Exam Form Creation
- Document and Email Templates
- Reminder Distribution
- Calendar Setup

Duration

Phase I will be conducted in one week. If Phase I is completed before the pre-defined week, employees are encouraged to attend and/or watch on demand or live webinars for Phase II. All recommended webinars/ recordings and tasks should be completed **before** the Check-in call.

Tasks

- Customize Calendar Setup
- Define Visit Statuses Needed for Practice Workflow
- Customize Exam Forms where Needed
- Customize Document and/or Email Templates as needed
- Ensure All Employees were added to Pulse (if the initial conversion is complete)
- Review Site Settings

Recommended Phase I Webinars

- Calendar Setup
- Exam/History/Lab Form Setup
- Document and Email Templates
- Employee Setup
- Client Portal (if utilizing)

Phase II: Billable Items Optimization

Overview

The webinars will review best practices for the development, implementation, and maintenance of billable items. Business/Billable Items Managers will be responsible for reviewing and updating billable items (Inventory, Procedures, Labs, and Packages) fields including, but not limited to:

- Name
- Category
- Sell Measure
- Price and Taxes
- Reminder Settings
- Linked Items
- Dispensable Settings
- Lab Code Mapping (for integrated labs)

Duration

- Phase II of this training program will be allotted two weeks. If Phase II is completed before the pre-defined two weeks, employees are encouraged to attend and/or watch on demand or live webinars for Phase III. All recommended webinars/recordings and tasks should be completed **before** the Check-in call.

Tasks

- Audit of converted data- employees, billables, and client/patient information (if applicable)
- Review billable item fields listed above on page 5 and update accordingly
- Link inventory items as needed (specifically vaccine procedures to Inventory item)
- Set up reminders and reminder associations
- Map your integrated labs
- Set up or review Packages

Recommended Phase II Webinars

- Data Audit
- Billable Items Optimization
- Vaccine Setup and Reminders
- Inventory Management

Phase III: Employee Readiness

Overview

The webinars will review the day to day workflow of Pulse.

Covered topics include, but are not limited to:

- Checking In Appointments
- Entering General Information
- Consent Forms
- Entering History and Exam Notes
- Estimates
- Invoicing
- Checking Out

Duration

Phase III will be conducted in one week but may begin early if the practice prefers. All recommended webinars/recordings and tasks should be completed **before** the Go-Live Q&A training call.

Recommended Phase III Webinars

- Bringing it All Together or Veterinarian Training (depending on employee role)
- Advanced Invoicing
- Using Estimates
- Reporting
- Go-Live Preparation

Tasks

It is recommended all employees watch the live webinars and/or on demand recordings. Employees should also implement learned features/tasks before the training call with a Pulse trainer in preparation to ask questions during the go-live readiness call. Staff should be able to demonstrate the following on a test client and patient:

- Create an Appointment for a New Client and Patient and Check it in.
- Update Patient History: Adding Historical Vaccines, Reminders, and Update Profile Information
- Update and Sign a Consent Form
- Complete History and Exam Forms for a Patient
- Create an Estimate and Convert it to an Invoice
- Invoice an In-House Lab and Record Results
- Invoice a Client and Receive Payment
- Email Client Receipt (make sure your personal email is in the client's email field)
- Process the return of one item off an invoice