



ExitCare On-Site Training Checklist

Please complete and return to your ExitCare trainer prior to the training.

X when complete. Underlined italics indicate information to be recorded in chart below.

X	Preparation Planning
	Project and IT/IS teams have determined a timeline for ExitCare installation, testing, rollout (which departments and which hardware), and updating. Timeline to be completed before on-site training.
	<u>Date installation to be completed:</u>
	<u>Target date for on-site training:</u>
	Confirm PO issued covers ExitCare on-site training for desired number of days.
	<u>If site-wide license purchased, identify departments that will use ExitCare:</u>
	<u>Target go-live date:</u>
	Installation and rollout plan (which departments and which hardware), and updating plans, understood and decided on
	Hardware & Software Configuration
	Meet PC hardware & software meet/exceed minimums for all departments, including training areas, using ExitCare. (See Document G: <i>Computer Hardware and Software Requirements</i> .)
	Consult ExitCare Tech Support; complete ExitCare software installation on server and PCs.
	Data (server) backup systems in place
	ExitCare Communications Software (ECCS) installed/tested for faxing/emailing.
	If used, MAPI compliant email program installed/tested for email.
	If purchased, completed HL7 installation process.
	Department filter codes set up.
	Printers installed and tested.
	General printers
	If applicable, script printers
	Sufficient quantities of printer supplies are on hand for each type of printer.
	User Security Groups created (Administrators, Super Users, Physicians, and Nursing Users) with appropriate security permissions.
	<u>Names of Security Groups:</u>
	Administrator and User accounts created in ExitCare.
	Attending caregiver and follow-up caregiver lists loaded in ExitCare.

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	Web Training
	Determine which users/user groups will participate in pre-visit web training.
	<u>Participating users/groups:</u>
	Coordinate web training schedule with ExitCare trainer.
	<u>Web training date and time:</u>
	Provide ExitCare In-Service CD to attendees; assign sections for preview prior to web training.
	On-Site Training
	Coordinate on-site training a minimum of four weeks before desired date.
	<u>Established on-site training dates:</u>
	Notify IS/IT Department of on-site training dates.
	Training room computers meet/exceed hardware/software minimums.
	Reserve training classrooms and equipment (projector, screen, etc.).
	Notify and/or select and assign ExitCare users to training session.
	Notify ExitCare users of schedule, attendance requirements, and necessary login information.
	Ensure ExitCare users are signed up for classes.
	Notify ExitCare trainer of on-site training details including the following:
	<u>Complete training schedule; provide adequate time between classes for ExitCare user arrival and departure, breaks for ExitCare trainer and recap time with site project leader. Schedule sent_____ Received_____</u>
	<u>Provide trainer with list of users signed up for classes</u>
	<u>Will training occur in client's live system or using ExitCare's trainer laptop brought on-site?</u>
	<u>Primary contact person supporting ExitCare trainer:</u>
	<u>Time and location to meet:</u>
	<u>IS/IT staff person(s) supporting ExitCare trainer for any tech issues during training visit. Name(s) and contact info:</u>
	If using client live system for training, provide assistant(s) that will help ExitCare users with logging in, general assistance, computer problems, etc.
	If using handouts, arrange for duplication with appropriate quantities.
	Plan to introduce ExitCare (why it's being used, etc.) to ExitCare users or provide statement for the trainer to use.
	<u>If applicable, statement sent/received.</u>

Please complete and return to your ExitCare trainer prior to the training.

If you have any questions or need more information, please call your ExitCare Customer Service Representative at 800-694-6669, ext. 3.