

INSTALLATION AND IMPLEMENTATION

THOUGHTSWIFT MEDICAL ASSESSMENTS

APPROACH

DAYS LEADING UP TO INSTALL

INSTALL AND OBJECTIVES

SETTING UP AN IPAD

TESTING

CONSISTENT TRAINING OF STAFF

FOLLOW UP PLANS

APPROACH

- ▶ Setting up an install date is a very important step in getting customers to use the Thoughtswift programs liberally and correctly from the start.
- ▶ Typically, you're initially closing for them to sign the Service Agreement and the HIPAA Agreement so that you can: "order the iPads, and set up an install date and begin the implementation and training stages."

APPROACH

- ▶ Once the date is set, spend the time between signing of agreements and setting them up to:
 - ▶ 1. determine & order the correct number of iPads.
 - ▶ 2. completely fill out a New Practice Set Up Form.
 - ▶ 3. visit a few times, continue to detail the staff on the importance of early detection, etcetera, and work out as many kinks as far as office flow; who will hand out the iPads; cover billing extensively; whatever else you can do to prepare.

A106 Pre-Implementation Checklist

- ▶ At this point, stop and fill out a “*Pre-Implementation Checklist Form*”, form A106. Also fill out A101, a “*New Practice Setup Form*”.

A106



For ThoughtSwift to be successful in your office the following ITEMS MUST BE COMPLETED before implementation

**NEW CUSTOMER PRE-
IMPLEMENTATION CHECK LIST**



A106 Pre-Implementation Checklist

Wi-Fi Password	<input type="checkbox"/>
Date To Start Program Is Set	<input type="checkbox"/>
Staff Is Notified Of New Program	<input type="checkbox"/>
Codes Are Active In EMR	<input type="checkbox"/>
Decide Where Assessments Are Given	Waiting Room <input type="checkbox"/> Exam Room <input type="checkbox"/>
Schedule Staff Training meeting	<input type="checkbox"/>
Assign ThoughtSwift Champion	<input type="checkbox"/>
Assign Assessment Goals To Staff	<input type="checkbox"/>

A101 New Practice Setup Form



A101

New Practice Setup Form

PRACTICE INFORMATION

Practice Name:	
Billing Address:	
Shipping Address:	
Email Address:	
Telephone Number:	
Email Address:	
Fax Number:	

TABLET INFORMATION

Unique Tablet Identifier:	
Email One:	
Email Two:	
User Name:	
Password:	

DOCTOR INFORMATION

Doctors Name:	
Mobile Number:	

Office Number:	
Email Address:	

OFFICE MANAGERS INFORMATION

Managers Name:	
Mobile Number:	
Office Number:	
Email Address:	

IT MANAGERS INFORMATION

Managers Name:	
Mobile Number:	
Office Number:	
Email Address:	

TS CHAMPION RESPONSIBLE FOR HANDING OUT TABLETS TO PATIENTS

Name(s):	
Phone Number:	
Email Address:	

GENERAL INFORMATION

Name Of EMR Used:	
How Often is Billing Done	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly
Where will Assessments be Performed	<input type="checkbox"/> Reception Room <input type="checkbox"/> Exam Room <input type="checkbox"/> Other
Are they Supplying own Tablet	<input type="checkbox"/> Yes <input type="checkbox"/> No



A101 New Practice Setup Form

Total Number of Patients Per Month:		Number of New Patients Per Month:	
Anticipated Implementation Date:			
BILLING INFORMATION			
Is Billing Done Locally:	<input type="radio"/> Yes	<input type="radio"/> No	
Billing Manager Name:			
Mobile Number:			
Office Number:			
Email Address:			
BILLING COMPANY INFORMATION (IF MARKED NO)			
Company name:			
Billing Address:			
Shipping Address:			
Telephone Number:			
Fax Number:			

Workflow

- ▶ **Workflow** is important to address early in the process of implementation and installation.
- ▶ **WHERE** will the iPads be handed out, and **WHO** will be in charge of getting them into patient's hands?
- ▶ Some offices like to have **the front office staff/receptionists** hand the tablet to a patient as they check in.
 - ▶ The receptionist will have to note in the chart that the patient took the ThoughtSwift Assessment to alert the providers that a test was taken and to clue in the billing department.
 - ▶ He or she will have to manage the assessment from handing out the tablet, to making sure the report is printed or dropped in the patient's EMR and communicating that to the providers.

Workflow

- ▶ Most offices will choose to have the MA's, PA's, nurses, etc give the patient the tablet **in the exam room.**
- ▶ This option is the most used option. It affords the practice the best inventory control and theft protection.
- ▶ Someone checks the patient into the room, takes their vitals and hands them the iPad with the understanding that they will be back in 5 minutes to get it from them.
- ▶ Then they come get the tablet, and hand it to the next patient, repeating that pattern all throughout the day.
- ▶ They are now responsible for making sure the test is completed and ensuring that the results get to where they need to be asap.
- ▶ Whatever the choice is, try to work it all out in advance so that everyone involved has their say, is trained on the process and ready to go "live" on installation day.

THE DAYS LEADING UP TO INSTALLATION

- ▶ The days proceeding the installation date are critical.
- ▶ By now, everyone should understand what we do and why we do it, and you should have the New Practice Set Up Form, filled out in your possession.
- ▶ In the days before you go to set them up, charge each iPad, add your email to each tablet.
- ▶ Using the NPSU Form, fill out the New Contact Form prior to the set-up date.
- ▶ Fill out the NCF, create the links for the practice.
- ▶ Install the links, visit the office, and test the links to the emails and/or fax machine.

Who's Tablet? Theirs or Ours?

- ▶ If an office has a tablet that they want to use, you can easily load the link right on their tablet, at no charge. Just be sure that it is hooked up to their wireless system.
- ▶ Inspect their iPad before agreeing to use it. If it is already used in their office setting and it looks ok, than just add our link to that tablet.
- ▶ The problem with this option is that sometimes the providers have an older tablet that was used in a family setting and it has ALL sorts of apps and games etc on it. You'll want to clear that stuff off if possible or at least click the settings to disable everything but safari.

Who's Tablet? Theirs or Ours?

- ▶ If they require a tablet. ThoughtSwift will provide them with a refurbished, original iPad, with a case and charger for \$149.00.
- ▶ We make no money on the tablet (nothing from stopping you from charging them more), but we do like this option because we can make sure the iPad is wiped clean and ready to go day one.
- ▶ We guarantee the iPad and will replace it if the tablet itself is defective, at no cost. Dropped or lost iPads will be replaced at cost to the practice.

Getting an account Set Up

- ▶ Go into their iPad, pull up your email on their tablet (see “*setting up an ipad*” in the following slides).
- ▶ Open the link. It will take you to this page:
- ▶ Be sure that the Username is the correct one. It should read something like “St. Vincent’s Med Ctr – Lakewood”

ThoughtSwift Medical Assessment

Username *

Getting an account Set Up

- ▶ Make all passwords 1 2 3 4 when filling out the New Contact Form, no one should forget that.
- ▶ Save the link to the home page.
- ▶ It will be a radial button that says “ThoughtSwift” under it.
- ▶ Move that button to the front page, move all non-essential items off of that front page.
- ▶ Open up “settings”, click “general”, turn on restrictions. The iPads we provide will have the code 1111 for the restrictions area. Lock out everything except for Safari, unless the providers want youtube, twitter, etc on for some reason.
- ▶ Remove your email from the iPad. Test it out.

SETTING UP AN IPAD

- ▶ In the doctor's office:
- ▶ 1. Go to Settings.

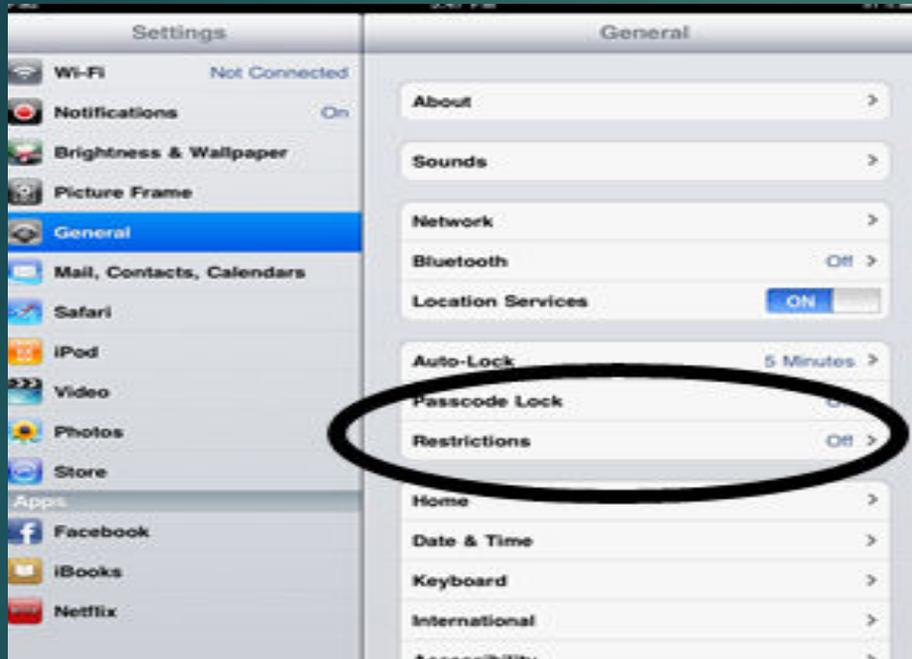


- ▶ Choose the doctor's wi-fi network and enter the password.



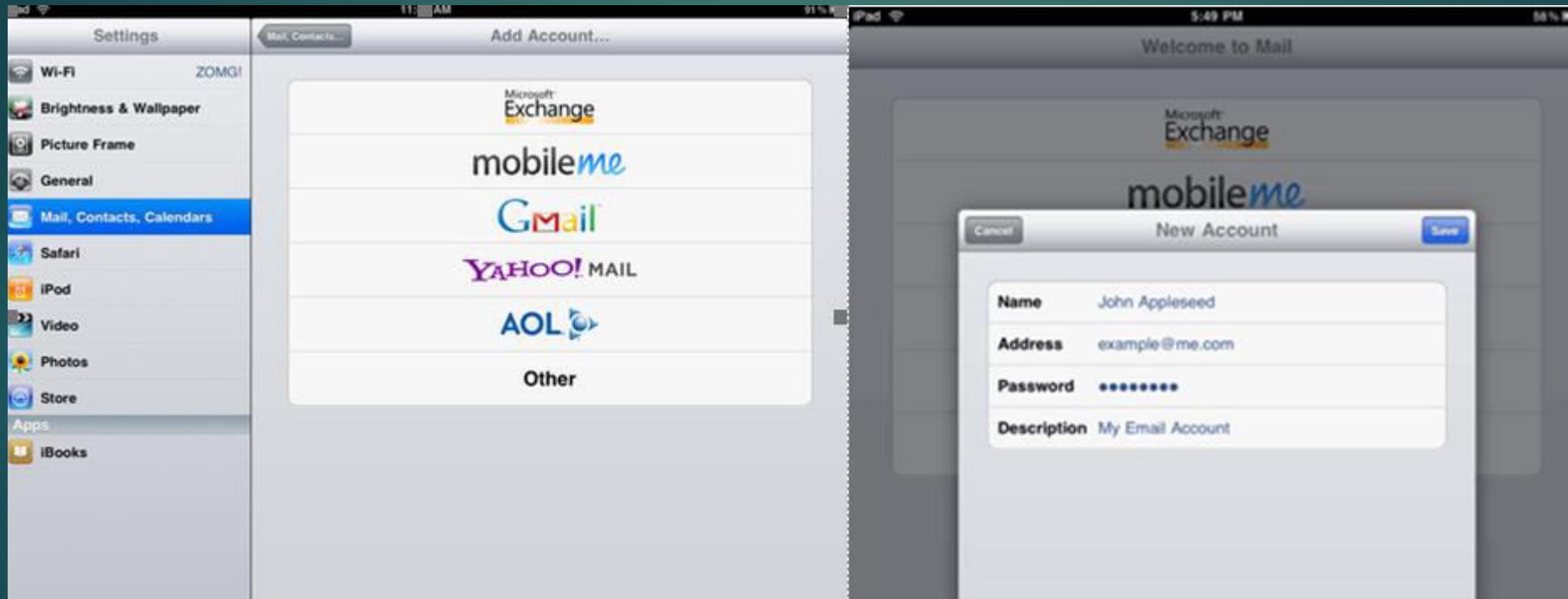
SETTING UP AN IPAD

- ▶ Go to General, then Restrictions. Turn all Restrictions OFF.



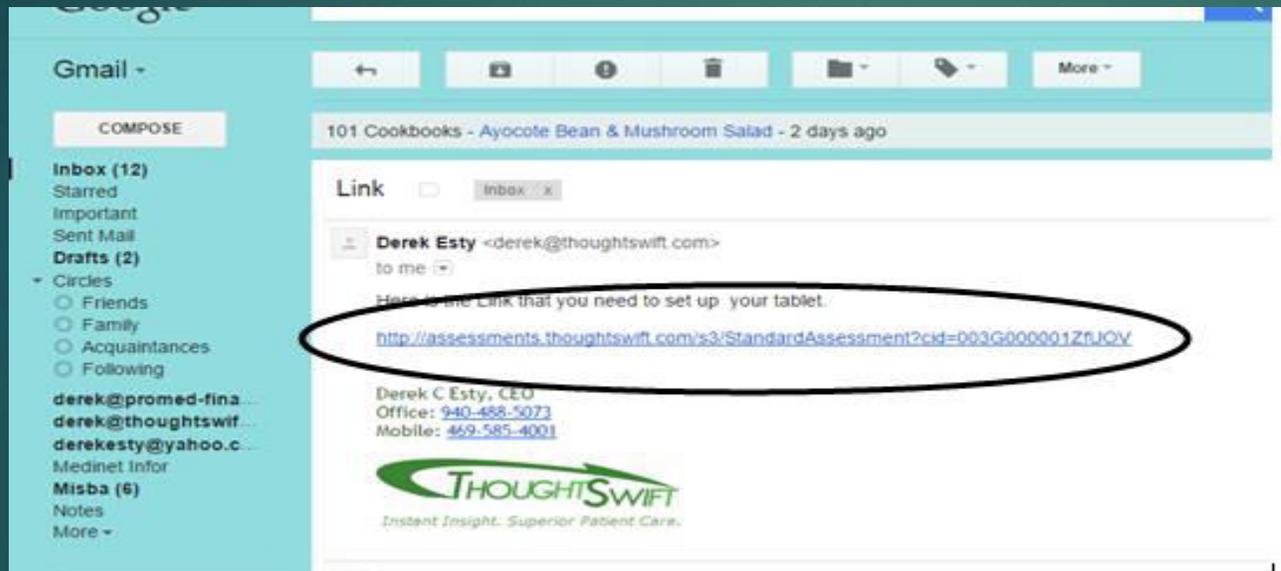
SETTING UP AN IPAD

- ▶ Push “Mail, Contacts, and Calendar” and choose email server and add YOUR name, YOUR email address and YOUR password.



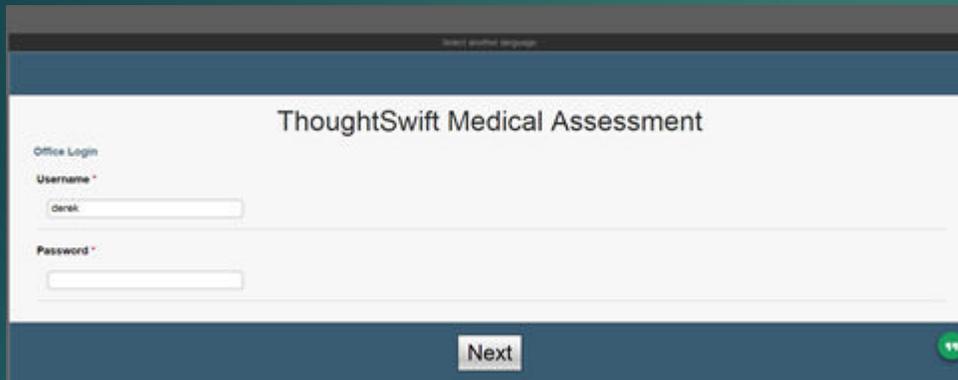
SETTING UP AN IPAD

- ▶ Retrieve the email link delivered to your ThoughtSwift affiliated email, (after the NCF is filled out, you should automatically receive the link), and click that link.



SETTING UP AN IPAD

- ▶ It should take you to the home page of your new account's assessments.



The screenshot shows a web browser interface for 'ThoughtSwift Medical Assessment'. At the top, there is a header with the text 'ThoughtSwift Medical Assessment'. Below the header, there is a section titled 'Office Login'. Under this section, there are two input fields: 'Username *' and 'Password *'. The 'Username *' field contains the text 'dent'. Below the input fields, there is a 'Next' button. In the bottom right corner of the page, there is a small green circular icon with the number '11' inside.

- ▶ Make sure that their user name is there. If not call 469-585-4001.
- ▶ Remove your email address from the tablet.
- ▶ Go back to restrictions and shut everything but Safari off.

THE DAYS LEADING UP TO INSTALLATION

- ▶ Test everything, each link, each iPad. Make sure everything works perfectly and report any issues to HQ.
- ▶ Talk to everyone, remind them of the reasons to test for Depression and the benefits of preventative mental health screenings.
- ▶ Remind them of how you will take care of them.

INSTALLATION DAY

- ▶ By now, you should know the staff who will be handing out the iPad, getting the results, and disseminating them. Take care of them on the date of installation. Have them take a test or two and see that the reports land where they are supposed to, remind them the importance of early detection.
- ▶ Get with as many doctors as possible, reiterate the mandate for the two G codes and why the 96103 is important and usually covered w/o deductible when billed correctly.
- ▶ Get the Doctor's permission to go meet with the biller and stay until you've covered everything regarding billing.
- ▶ Stay until the office runs a "test run" on 5-10 patients and ensure all systems are a GO.

FOLLOW UP

- ▶ You should plan to visit your new account no less than 5-6 times over the next 20 business days.
- ▶ If the count is low, or not as high as it could be, probe to find out where the bottlenecks and sticking points are and address them.
- ▶ See the physicians and PMs. Insist on seeing them. Detail them again on the revenues, our guarantee, on raising scores, and the good medicine our assessments provide.
- ▶ Bring the doctors/PMs into the conversation with the staff. Repeat everything you just covered with the Doctor and get their buy-in in front of the staff. Talk to the staff after and do what you can to make it easy for them to work the product.

FOLLOW UP

- ▶ Stay on them and “*shepherd them through*” until they are a well-oiled machine doing the maximum each day.

THANK YOU

- ▶ ThoughtSwift thanks you for your business and for bringing us a new customer, we will treat them like family.
- ▶ We want to do everything we can to ensure your success. Please feel free to contact us at any time for help with this process or to help with a customer.
- ▶ We always reach out to our new clients to welcome them aboard and describe our back-office services. Please let them know that ThoughtSwift will be in contact with them, and, please give them all of our contact information.