



Facility On-boarding Checklist

Off-Site Preparation

- Send Facility Intro Video & Schedule client set-up appointment.
 - Have the facility personnel view the following video: Facility Intro video:
<http://videos.infraware.com/avc-fullscreen.aspx?v=67>
 - Schedule InfraCare Standby at least 2 business days prior to Client Visit →
support@infraware.com
- Ensure Facility system requirements (Operating systems, memory, etc). See Software tab in the IMC for details.
- In the IMC: Create saved searches by Facility Login:
<http://www.infraware.com/KB/afmmain.aspx?faqid=236>
- Enter test jobs (via IDC or TDS) and have some at all stages of completion
- Set EHR Web Portal permissions: <http://www.infraware.com/KB/afmmain.aspx?faqid=247>
- Ask for Facility IT standby for firewall & installation issues
- Get Physician Address book info, set up correct spreadsheet, submit for upload
<http://www.infraware.com/KB/afmmain.aspx?faqid=174>

On-site with the Facility

- Install the following software:
 - Online Editor: Login to the EHR Web Portal → Software tab → Install Online Editor 2009
 - Internet Explorer Settings Requirements for Online Editor:
<http://www.infraware.com/KB/afmmain.aspx?faqid=413>
 - IDC 2009 → If using handheld or dictating into IDC (not using TDS)
- Facility Admin Training:
 - Prior to arriving print the following KB's for their reference:
 - EHR Web Portal Quick Start Guide:
<http://www.infraware.com/KB/afmmain.aspx?faqid=215>
 - Print & Download from Web Portal:
<http://www.infraware.com/KB/afmmain.aspx?faqid=292>
 - IDC Quick Start Guide <http://www.infraware.com/KB/afmmain.aspx?faqid=218>
 - Set IDC preferences: One-step User setting set-up:
<http://www.infraware.com/KB/afmmain.aspx?faqid=282>
 - Provide EHR Web Portal Login name and password
 - Save <https://www.infraware.com/webehr> as a Favorite or create desktop shortcut:
In internet explorer, go to this website: www.infraware.com/webehr. You don't have to login. On Internet Explorer, click File --> Send --> Shortcut to Desktop. That will place a shortcut on their desktop to the EHR web portal.
- Author Training:
 - For Authors: Best Practices for Dictation:
<http://www.infraware.com/KB/afmmain.aspx?faqid=67>



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- TDS Quick Reference if using phone:
<http://www.infraware.com/KB/afmmain.aspx?faqid=265>
- Provide EHR Web Portal Login name and password
- Save <https://www.infraware.com/webehr> as a Favorite or create desktop shortcut
- EHR Web Portal Quick Start Guide:
<http://www.infraware.com/KB/afmmain.aspx?faqid=215>
- For Authors that eSign:
 1. Review “How does eSign work?”
<http://www.infraware.com/KB/afmmain.aspx?faqid=133>
 2. Teach authors eSign (download recording, modify ADT, actions):
<http://www.infraware.com/KB/afmmain.aspx?faqid=317>