

Pharmacy Go-live Checklist

**Below are the FIVE steps in the implementation process for new pharmacies:**

1. Partner Application Submitted
   * Complete the [online partner application](https://quickmar-my.sharepoint.com/personal/sdrechsel_quickmar_com/Documents/Quickmar/QM%20Documents/quickmar.com/partnerapp).
   * [Pay](https://payments.quickmar.com/) your one-time start-up fee.
     + You may have already made this payment as part of the application process. If not, please click the “pay” link or send payment to

QuickMAR   
1017 S Arbor Island Way  
Eagle, ID 83616.

**Please include your pharmacy name and address with your payment.**

* + - Interface set-up and training can be scheduled only ***after*** the one-time start-up fee has been paid.
  + Download relevant documents:
    - CareSuite System Requirements
    - Implementation Process Introduction
    - Facility Training Fees and Free Training Resources
    - CareSuite RX Reference Guide

1. Interface Set Up
   * Contact your pharmacy dispensing software provider to understand licensing requirements to interface with CareSuite.
   * Use the “CareSuite RX Reference Guide” PDF to help adjust orders within your dispensing software.
   * **REPLY ALL** to the email from QuickMAR requesting dates to schedule an appointment with QuickMAR to set up the interface between your dispensing software and CareSuite.
   * Push data across the interface. (NOTE: You may be able to do this yourself or you may need to contact your dispensing software.)
2. Pharmacy Training
   * Reply to the email from QuickMAR requesting dates to schedule a time to complete your 60- to 90-minute web-based training. (NOTE: Only ONE pharmacy training session is included in your one-time start-up fee.)
     + Read the “CareSuite Pharmacy Training Guide.”
   * Attend that training along with anyone else who may use CareSuite at the pharmacy. (NOTE: We recommend that at least the pharmacy manager and any key data entry personnel participate in this training.)
     + In anticipation of this, please, ensure that you have at least one internet-capable device with a screen large enough for everyone to see and speakers loud enough for everyone to hear the webinar. A microphone is also a useful feature, since the webinar will be interactive. You can also call in using a speaker phone.
   * After the training:
     + Download CareSuite Rx and CareSuite Client.
       - Go to [www.QuickMAR.com/installs](http://www.QuickMAR.com/installs) and enter your CareSuite credentials.
       - Scroll down to the bottom of the page and download the install files by clicking on each of the two green buttons (“CareSuite Rx” and “CareSuite Client”).
       - Run the files and then update the software.
         * If you run into any difficulty while installing, please call our support line (888-340-9866 x2).
     + Build user accounts for pharmacy users.
       - To create new pharmacy user accounts in CareSuite® Rx, click the Pharmacy Conf button, and go to the “Users” tab. (NOTE: Your credentials will give you access to BOTH CareSuite Rx and CareSuite Client.)
     + Clean up CareSuite data.
       - Review data entry practices to see what might be causing incomplete data.
       - Carefully examine the residents and orders within CareSuite Client and clear red flags, either from your dispensing software or within the Dashboard of CareSuite Rx.
     + Optimize your data entry practices to work with the CareSuite interface.
       - Use the “QuickMAR Interface Test Plan” for a list of scenarios you need to test to confirm that everything is working correctly.
         * Special order types (split orders, treatment orders, etc.)
         * Schedules and frequencies
         * Keywords (info, slide, treat…)
       - NOTE – your interface may or may not support every type of schedule, keywords, etc.
3. Facility Training
   * Designate at least one representative from the pharmacy to attend the facility training, either online or in person.
     + There are three main reasons why at least one member of the pharmacy staff should attend the facility training:
       - To hammer out policies before the facility goes live
       - To understand how the facility will utilize CareSuite so that you can serve them better
       - To be able to replicate that training on your own in the future, if desired
   * Discuss these items with the facility:
     + To profile/not to profile?
     + How should certain processes be handled? – Fax, email, phone call…
       - DC’d orders
       - New orders
       - Order changes
       - Etc.
     + Messaging – should we use it?
     + Field ownership – who can edit what?
     + Reordering and/or Cycle Fill
     + Non-med orders: (NOTE: Best Practice: Non-med orders are best managed within CareSuite by the facility.)
       - Informational orders – who’s responsible?
       - Treatments
       - Vitals
4. Facility Go-live
   * In the days preceding the facility’s go-live, there should be a thorough order review (MAR reconciliation). During this process:
     + Work with the facility when they check the data.
     + Answer questions and resolve order issues.