

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.