

Infusion Project Closeout Support Handbook

Ochsner Hancock



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This guide is a deliverable from the project close out meeting and contains details from the project and serve as a reference guide following the project close out. The information is current as of project closeout but is subject to change over time.

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At the completion of the project, the BD Project Manager facilitates transition of product support from the on-site implementation team to BD's Technical Support, Customer Advocacy and Clinical Support teams based on the following criteria:

- Post go-live support from the implementation team is complete per contract
- Open issues have been communicated and being managed by the hospital support team
- Customer product enhancement requests have been submitted to appropriate Infusion Product team(s)

Post-implementation, there are multiple sources of support available. Customers have access to BD Technical Support, Customer Advocacy, and Customer Order Management

Alaris™ Customer Number

Site ID	10010818

Technical Support

Alaris™ Technical Support Team	Hours: Mon - Friday 6:00am - 5:00pm (Pacific Time)
Instrument Support (Hardware, Parts, and Desktop Software)	
• Phone Number:	866-488-1408, Option 1
Enterprise Support (Systems Manager Server, Wireless)	
• Phone Number:	866-488-1408, Option 2
Infusion Viewer, Charge Capture, HealthSight Viewer Products	
Phone Number:	866-488-1408, Option 3
• Email Address:	server.support@bd.com
EMR Interoperability	(24/7 support*, via on-call engineer) If live with Interoperability and do know root cause of your issue, use Option 3
Phone Number:	866-488-1408, Option 3
Email Address:	server.support@bd.com
	*24/7 support for production environment only

Customer Advocacy

Alaris™ Customer Advocacy - Clinical investigations and product complaints	Help Available 24/7 by leaving a voicemail for on- call Nurse
Email Address:	customerfeedback@bd.com
Phone Number:	888-812-3266, if after hours and call back required, listen for instructions to page on-call Nurse

Customer Order Management

Customer Order Management - Product sales and returns, billing questions or routine product repair requests	6:00am - 3:00pm Pacific Time
Phone Number:	800-482-4822 800-447-7825
Email Address:	CustCareInfusion@carefusion.com
Order Tracking:	CareFusion Order Tracking (need Customer Number + Order Number or PO Number)
Exchanges/Returns:	Return Policy

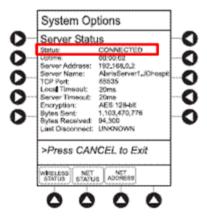
To expedite and improve our responsiveness to your server/interoperability support, please be prepared to answer the below questions when you call. Please provide as much detail as possible.

- Is the issue on the Production system or Test (training) environment?
- Have you confirmed with your hospital IT that there are no network outages?
- Is the problem impacting just one device, multiple devices or all devices?
 - o If one device, please have the PCU module serial numbers.
- When exactly did the problem start?
 - Having the specific time(s) allows us to trace the issue.
- Is the system behaving strangely or is it not responding at all?
- If you are using Epic or Cerner, are pre-populated orders getting to the pumps?
- Is there a specific message we can trace or further examined?
- Is the PCU connected to the Alaris server?
 - o Follow instructions as provided:

Figure 1: How to check if PC Unit is connected to the Alaris Server

- On the PC Unit, press the **OPTIONS** key.
- Press PAGE DOWN key twice
- Press the **Network Status** soft key.
- Enter password **32221** and press **CONFIRM** soft key.
- At the bottom, press Server Status
- Check the PCU has a status of "Connected"

Figure 1



Viewing BD Alaris™ Product Security and Privacy Alerts

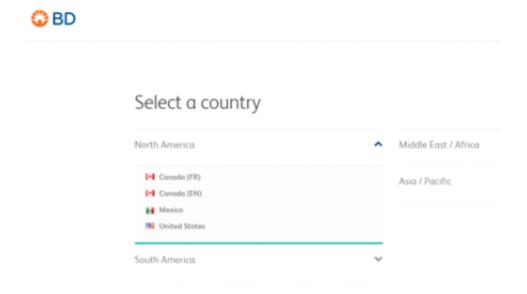
Below are the instructions for how to view BD Alaris™ Alert bulletins on an ongoing basis.

Access the following link: http://www.bd.com/en-us/support/product-security-and-privacy

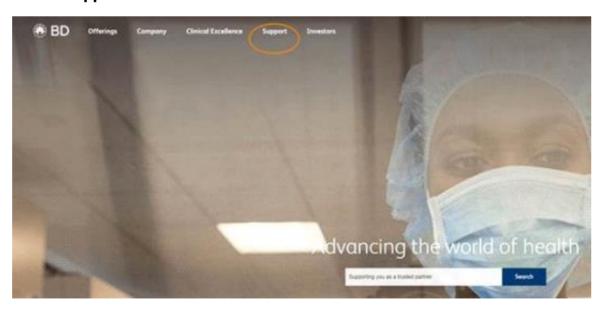
To access manually:

Go to www.bd.com

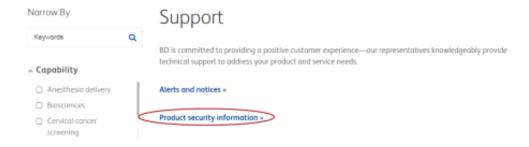
Select United States (if applicable)



Select Support



Select Product security information



Scroll down to Alert bulletins

Alert bulletins

For product security and privacy alerts, notifications and documentation, see the following:

Date	Alert/Bulletin
2/12/2018	Product security bulletin for BD FACSDiva
1/23/2018	Product security bulletin for BD Pyxis™ MedStation™ ES
1/12/2018	Product security bulletin for Meltdown and Spectre Update 1
1/5/2018	Product security bulletin for Meltdown and Spectre
10/27/2017	Product security service bulletin for WPA2 "KRACK" Wi-Fi Vulnerability
10/11/2017	Product security bulletin for Alaris™ PC unit (PCU) (model 8015) update
6/28/2017	Petya ransomware
5/13/2017	WannaCry ransomware
3/16/2017	Product security bulletin for BD Kiestra™ TLA, BD Kiestra™ WCA, BD Kiestra™ InoquIA™+
2/6/2017	Product security bulletin for Alaris™ PC unit (PCU) (model 8015)
2/6/2017	Product security bulletin for Alaris™ PC unit (PCU) (model 8000)

Customer Specific Contacts

Customer Success Manager (CSM) –	
Include if this customer has a CSM is assigned.	
Name:	Kathy O'Rourke
Email Address:	Kathy.orourke@bd.com
Phone Number:	331.444.4129
Account Executive (AE) – Your main sales contact	
Name:	Stacey Eatinger
Email Address:	Stacey.Arceneaux@bd.com
Phone Number:	(225) 337-0994
Infusion Disposable Account	
Executive (IDEA) – Your main tubing sales contact	
Name:	Kim Sharp
Email Address:	Kimberly.Sharp@bd.com
Phone Number:	985.789.7148
Clinical Infusion Data Consultant	
(CIDC) - Provide support to your identified Infusion Data Users	
Name:	Karen Braswell
Email Address:	Karen.Braswell@bd.com
Account Manager - The Manager of	
Professional Services who is responsible for the Implementation Project Manager	
and Consultants.	
Name:	Nadine Litman-Korpon
Email Address:	Nadine.LitmanKorpon@bd.com
Phone Number:	7249792105



Alaris™ System Product Contact Info Flier 07.05.2017



For Alaris™ System questions, consider the following:

- 1. Review the Hang Tags on the Device
- 2. Ask your Super User
- 3. Refer to the Alaris System User Manual
- 4. Go to the BD Learning Compass (LearningCompass@bd.com)
- 5. For Tubing questions, email GMB-CF-IVSetSupport@bd.com
- 6. Contact a BD Clinical Practice Consultant (CPC)

Email: GMB-CPC-Clinical@bd.com

Hours: Monday - Friday 7am-4pm PST

Consultants strive to respond by the next business day

For any product issues, patient events, or urgent needs:

Call BD Customer Advocacy at 888-812-3266 or email CustomerFeedback@bd.com

© 2017 BD. BD, the BD Logo and all other trademarks are property of Becton, Dickinson and Company. IFPS BCCR CF/201/16/0102(1) Page 1 of 1 Although the BD implementation team provides tools to the various operational stakeholders to supporting your new technology post go-live, ensuring staff are taking full advantage of the Alaris System and software can be challenging in the first few months. Because of this, our Clinical Consultant will schedule a return visit to check-in with key stakeholders and repeat compliance rounds and a fleet assessment approximately 3 months post go live.

Initial planning for this return visit occurs early in the project around time of data set review, then confirmed at the end of the project. For projects involving multiple sites, return compliance rounds may be scheduled at multiple sites. This visit will consist of up to 8 hours of clinical rounds and meetings.

What will be included?

Compliance Rounds

- Meet with Key Stakeholders to discuss current workflow and trends
- Clinical Consultant will round with hospital staff and repeat compliance check on clinical use of Guardrails™ software, primary set loading, recommendations for use of secondary sets, PCA and Syringe use if applicable
- Assess cleaning process, and health of the fleet
- Provide de-brief while onsite to discuss preliminary findings
- Provide report summary of all findings as well as recommendations to address

The Post Transition Engagement is all part of BD's focus on the customer experience. We are excited to be a partner in your success.

Pharmacy Support

If you need technical support with your Guardrails Editor software, contact Technical Support and select option 1.

Alaris™ Technical Support Team	Hours: Mon - Fri 6:00am - 5:00pm (PST)
Instrument Support (Hardware, Parts, and Desktop Software)	
Phone Number:	866-488-1408, Option 1

If you require assistance from a BD Pharmacy Consultant, please use the contact information below. Access to the PC group is dependent on your organization's Software Maintenance Support (SMS) contract. Not all services are covered under the agreement, and some requests may have cost associated with its use. Your BD Account Executive can assist, if you have questions about your SMS contract.

Email Address:	GMB-OptimizationServices@bd.com
Phone:	Tel: 800-854-7128 option 1, 1, 4 (may take up to 48 hours for response)

Below is a listing of the training sessions BD offers customers who are implementing or have implemented the BD Alaris TM System. These calls may be used as introductory or refresher training. Advanced registration is required for all training sessions using BD Learning Compass at: https://bd.com/LearningCompass. After completing an initial registration in the Customer Portal, you will receive an email to activate your account; then log in. Enter the Alaris System Webinar in the Search bar in the upper right corner of the screen. Request the curriculum and then click Launch to register for the webinar of your choice.

Add the registration link to your Outlook calendar as a reminder. BD hosts will end training sessions in which no participants have arrived in the first 15 minutes of training.

Calls in orange are implementation calls offered to ALL customers.

Calls in gray are part of the Software Management Services (SMS) or Optimization contracts and are ONLY available to these customers.

If you are interested in the SMS/Optimization training courses, please email $\underline{\text{GMB-OptimizationServices@bd.com}} for contract a vailability.$

Guardrails™ Editor Introductory Training Course #CLP1157 (Pre-Recorded Session)

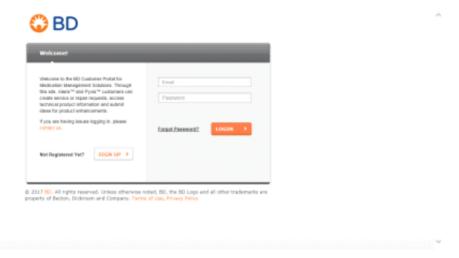
Guardrails Editor Refresher Training Course #CLP1163



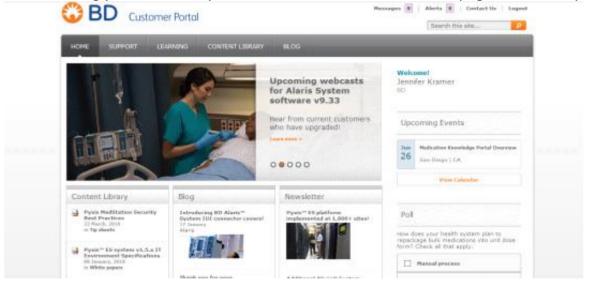
Through the Customer Portal customers can create service requests, access technical product information and submit ideas for product enhancements.

Logging into the Customer Portal

To access the BD Customer Portal go to https://eim.carefusion.com

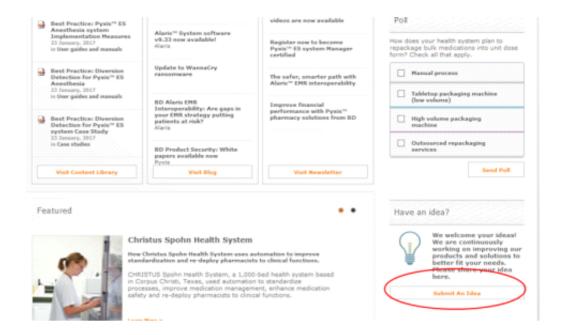


After entering your email and password the Customer Portal home page below is displayed.



Requesting Product Enhancements

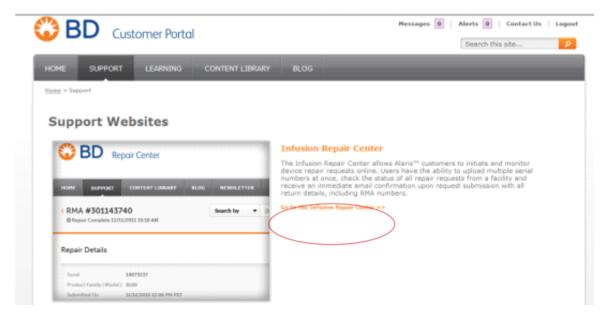
After logging onto the Customer Portal Select the Home section and scroll down to the "Have an Idea?" section and click on "Submit and Idea" button.



Self Service

The Infusion Repair Center allows Alaris $^{\text{\tiny{TM}}}$ customers to initiate and monitor device repair requests online.

After logging onto the Customer Portal Select the Support section and scroll down to the Infusion Repair Center and click on "Go to the Infusion Repair Center".





$AS_EXT_CustomerWebinarSchedule_Full$



BD Learning Compass Customer Webinar Schedule Full Description 05.30.2017

Below is a listing of the training sessions BD offers customers who are implementing or have implemented the Alaris™ System. These calls may be used as introductory or refresher training. Advanced registration is required for all training sessions using BD Learning Compass at: https://bd.com/LearningCompass. After completing an initial registration in the Customer Portal, you will receive an email to activate your account; then log in. Enter the Alaris System Webinar in the Search bar in the upper right comer of the screen. Request the curriculum and then dick Launch to register for the webinar of your choice.

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Calls in gray are part of Software Management Services (SMS) or Optimization contracts and are ONLY available to these customers.

If you are interested in the SMS/Optimization training courses please email GMB-OptimizationServices@BD.com for contract availability.

Available Courses:

COI Re	porter 1	raining	Course	#CLP116	0

Guardrails™ Editor Introductory Training Course #CLP1157 (Pre-Recorded Session)

Compliance Rounds Course #CLP1158

Managing Your Investment Course #CLP1267

Getting the Full Value From Your Management Services: Suggestions on Planning and

Scheduling Course #CLP1159

Guardrails Editor Refresher Training Course #CLP1163

Knowledge Portal for Infusion Technologies Training Course #CLP1162

Preparing for Alaris Interoperability Course #CLP1266

Infusion Analytics Service Packet Course # CLP25500

*Training sessions will not be held during the weeks of July 4th, Thanksgiving, Christmas, and New Years.

Call dates/times are subject to change; please check the webinar registration site for the most up-to-date schedule.

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BD Learning Compass Customer Webinar Schedule Full Description 05.30.2017

Course Descriptions

Introductory Calls Available for ALL Customers:

1. Guardrails CQI Reporter Training Course #CLP1160

This introductory call is available to all customers and is geared towards customers early in the implementation process, to new clinical professionals taking over the role of managing CQI data, or can be used as a refresher course for customers who previously implemented the Alaris System. This webinar features a clinical peer to provide interactive education on the use of the Guardrails CQI Reporter. This intro call focuses on the charts that can be used to graphically view the compliance use of the hospital's Data Set. It demonstrates how the reports are used to view alerts on the infusion data. The webinar also provides insight into how this actionable data can be used to understand what nursing is actually programming on the patient units. This measurable data can be used in improving medication safety standards after implementing the Alaris Medication System with Guardrails safety software. The CQI Reporter is a PC-based software application that enables you to access alerts, analyze trends, and make clinical practice improvements. Medication safety is a continuous data driven activity; with each cycle, you can build on your previous improvements and identify new areas to examine and refine.

Live webinar available bi-monthly by registering using the BD Learning Compass.

2. Guardrails Editor Introductory Training Course #CLP1157 (Pre-Recorded Session)

This introductory pre-recorded session is available to all customers and is designed to help prepare hospital Phacmacists for the actual Guardrails Editor training and biulding of the Data Set with their BD Pharmacy Consultant. This webinar is taught by licensed pharmacists. During the session, the differences between smart pumps and other insuion pumps are discussed. The training describes the concepts of the safety software utilized with the Alaris System, also explaining the importance of the hospital Pharmacist in building the Data Set. The trianing gives a brief overview of the software, and helps prepare hospital for the next steps in the implementation process. Also defines Guardrails limits and illustrates how to build drugs in different profiles and libraries. The session discusses recommended tools and resources that pharmacy professionals should gather to help prepare them for their time with their BD Pharmacy Consultant.

Recorded webcast available at any time by registering using the BD Learning Compass.

3. Compliance Rounds Course #CLP1158

This introductory recorded webcast is available to all customers. This webcast helps educate facilities on how to best use the Alaris System and understand the medication safety software. The recorded session provides a brief overview of the software and the data, the process of compliance rounds, and helps prepare the customer for the next steps in the implementation process. Each hospital can act on this data to further protect their investment in patient safety.

Data retrieved from the Alaris System will not provide all of the information needed to assess and evaluate adoption to the technology and clinical practice patterns; it is also necessary to understand the context in which the events may have occurred. Compliance Rounds and annual competency education are an effective strategy to obtain this information and ultimately to communicate key data in an effort to effect positive change.



BD Learning Compass Customer Webinar Schedule Full Description

When used correctly, smart pump technology is successful in averting IV administration errors. Guardrails Safety Software alerts your clinicians to possible med administration risks at the bedside; the data from the CQI™ Reports and Compliance Rounds can alert you to risks in clinical practice. But, it is necessary to have a plan ready for managing both the compliance rounds and the information retrieved from your new infusion system.

Recorded webcast available at any time by registering using the BD Learning Compass.

4. Managing Your Investment Course #CLP1267

This introductory course is available to all customers to utilize their investment to the fullest capabilities. Discussion will center around development of a control plan to assist in data set management, device management, management of ongoing education, monitoring of compliance and Data Set management.

Live webinar available monthly by registering using the BD Learning Compass.

Software Management Services/Optimization Service Calls:

1. Getting the Full Value From Your Maintenance Services: Suggestions on Planning and Scheduling Course #CLP1159

This recorded webcast, intended for SMS customers provides information on how they can get the full value out of their Software Management Services or their Optimization Services. During the session, discussion centers around the type of services available, the resources that exist to assist them in determining what services their facility has, and time is spent describing various ways in which they can use these services in their facilities.

Email <u>GMB-OptimizationServices@BD.com</u> for eligibility. If eligible, please register using the BD Learning Compass.

2. Guardrails Editor Refresher Training Course #CLP1163

The process of designing, implementing, and analyzing the data produced by the Guardrails Editor Suite MX software will become a vital component of your best practice process. This comprehensive two hour webinar is for Pharmacists or Pharmacy professionals that are using the Guardrails Suite MX software. This webinar teaches on the technical functionality of the software. This training was created for pharmacists by Alaris Pharmacy consultants. Instruction is provided on the main components of the Data Set, which consist of: Drug and Fluid Libraries, Therapies, Clinical advisories, Channel Labels, and Configurations. Demonstrates the importance of concentration limits and educates on Institute for Safe Medication Practice's (ISMP) concentration standards. ISMP articles are also provided for pharmacists that attend the call. Displays how drugs are built, how to utilize bolus features, and shows additional safety features that are available to the pharmacist. Provides examples of how to build antibiotics, therapies, continuous infusions, fluids, and PCAs. This demonstration uses real examples of drugs and is taught by a clinical peer. This webcast is interactive and is designed to help pharmacists learn how to use the software.

Email <u>GMB-OptimizationServices@BD.com</u> for eligibility. If eligible, please register using the BD Learning Compass.



BD Learning Compass Customer Webinar Schedule Full Description 05.30.2017

3. Infusion Knowledge Portal (IKP) Training Course #CLP1162

This webinar is Technical training on the Infusion Knowledge Portal. This interactive webinar on the IKP will provide hospitals with CQI infusion data that helps them evaluate clinical practices across their hospital/hospitals. IKP offers hospitals web-based access to comprehensive infusion data when and where they need to identify key areas of focus to help improve clinical practice and patient outcomes. This webinar, presented by a clinical peer will review the reporting tool and discuss clinical activities and identify potential areas for improvement relative to medication infusion safety.

Email <u>GMB-OptimizationServices@BD.com</u> for eligibility. If eligible, please register using the BD Learning Compass.

4. Preparing for Alaris Interoperability Course CLP#1266

This webinar is designed to provide an overview to the hospital team of the project plan for smart pump connectivity with the hospital information system electronic medical record supporting both auto prepopulation of the infusion device and auto-documentation of the health record. A brief overview of auto prepopulation workflow will be discussed along with key principles of readiness assessment for technology (software and hardware), pharmacy formularly alignment with Alaris drug library and clinical workflow standardization.

Email <u>GMB-OptimizationServices@BD.com</u> for eligibility. If eligible, please register using the BD Learning Compass

5. Infusion Analytics Service Packet Course CLP#25500

This webinar is designed to provide an overview to the hospital team of the Infusion Analytics Service Packet. Terms and definitions utilized in the packet are defined. Also, tips to efficiently maneuver through the report are shared. This course is a self-paced, computer-based training session.

Email <u>GMB-OptimizationServices@BD.com</u> for eligibility. If eligible, please register using the BD Learning Compass.

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What is BD Learning Compass?

BD Learning Compass is the cloud-based Learning Management System (LMS) that provides customers with:

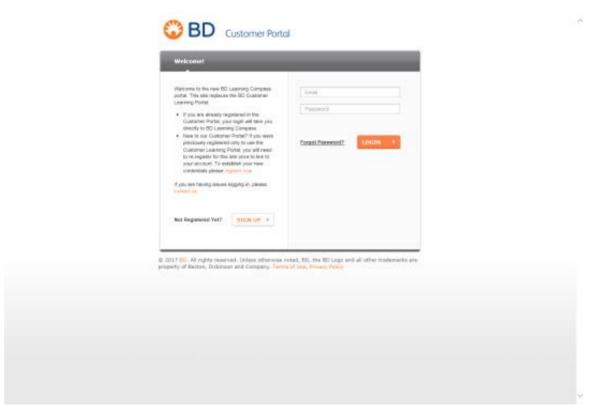
- Improved navigation and searching for course content
- Training targeted to learners by their role, the products they are using, or the type of learning
- Learning organized in logical curriculum groups, sequenced in meaningful ways
- Integration with the BD Customer Portal, providing a single sign-on experience with more BD services
- Unique permissions for customer educators to manage learning for users at their own sites within the system

Note: There is no limit on classes for hospital employees.

As a customer this is your point of access for online training session that can be completed by hospital employees and is found at https://bd.com/learningcompass.

How to Register and Log in

Navigate to https://bd.com/LearningCompass



First-time Customer Portal User Registration

- 1. Click SIGN UP and complete the registration form. Use your work email address, and make sure to select your position in your profile. This will highlight courses that are popular for your position.
- 2. Your email address is your user name. Make sure to write down password you create.
- 3. If your account was migrated from our previous LMS, the system will recognize you and ask you to set the password and answer a few new questions.

- 4. We will send you an activation email*. Open that, and click on the activation link.
- 5. On the confirmation page, log in with your email address and password to be taken directly to BD Learning Compass.

If you already have a Customer Portal Account

• Log in with your email address and password to be taken directly to BD Learning Compass.

Downloading SCORM files

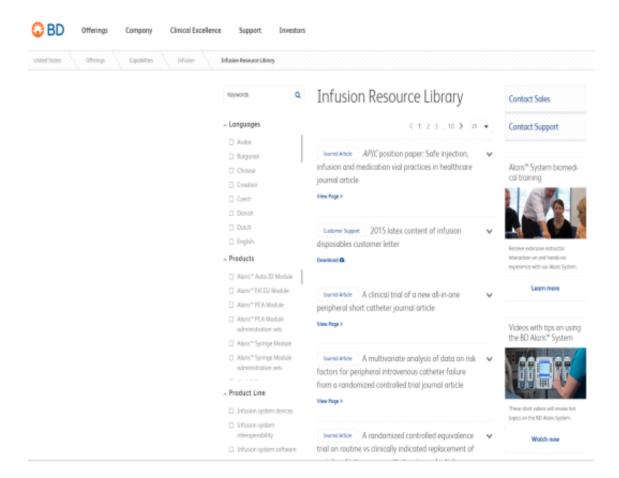
For information about downloading to your learning management system complete the following course: CLP1251-DL - How to Download Basic Tutorials to install in a Customer's Learning Management System

^{*}The activation email is sent immediately. If you don't receive the activation email within 15 minutes, check your spam mail folder. If you don't find it there, send an email from the email account you used to register to LearningCompass@bd.com so we can manually activate your account with the correct email address.

The Infusion Resource Library contains multiple documents supporting the various BD Alaris[™] Infusion products. When you access the main page, you can sort by language, products, product line, content type and resource format (including video).

Infusion Documentation

Infusion Resource Library	Click here to access the full Infusion Resource Library
Quick Link	Manuals and Technical Bulletins
Quick Link	Case Studies, White Papers, Tip Sheets



The BD Alaris System requires proper care and maintenance to remain in good condition. Below and attached you will find the cleaning resources that are available to you:

 $\label{thm:cleaning} \begin{tabular}{ll} Visit the cleaning quicklink on the Infusion Resource Library: $$\underline{$www.bd.com/AlarisSystemCleaning}$ For cleaning question, contact $$\underline{AlarisSystemCleaning@bd.com}$ \end{tabular}$

Alaris System cleaning kit ordering information	
Customer order management representative	800-482-4822 800-447-7825
Email Address:	CustCareInfusion@carefusion.com

Document	File
Video: Proper Cleaning Techniques for the Alaris Infusion System	<u>Clickhere to view</u>
Tip Sheet: Cleaning Product Guidelines for the Alaris System	<u>Clickhere to view</u>
Tip Sheet: Alaris System I UI Inspection	<u>Clickhere to view</u>
Training Checklist: Best Practices for Cleaning the Alaris System	<u>Clickhere to view</u>
Audit Checklist: Audit of Best Practices for Cleaning Alaris System Devices	<u>Clickhere to view</u>
Infusion Resource Library (keyword 'Cleaning')	<u>Clickhere to view</u>

Our specialized seminars help hospital-based biomedical engineers understand maintenance of the Alaris System. Seminars offer hands-on training and are led by BD Technical Support staff.

Topics include:

- Introduction to products
- Theory of operation
- Self-test and diagnostic features
- Calibration procedures
- Assembly and disassembly techniques

To access the schedule, register, gain additional details around tuition, topics, accommodations or general information, please click here.



ASSOCIATED ACRONYM	DEFINITION
ADT	Admit / Discharge / Transfer
CAP	Customer Approval Portal
CCE	BD Care Coordination Engine
EC	Equipment Confirmation
EMR	Electronic Medical Record
HIS	Hospital Information System
HIT	Healthcare Information Technology
HL7	Health Level 7
IDN	Integrated Delivery Network
IE	Integration Engineer
LMS	Learning Management System
NE	Network Engineer
PMO	Project Management Office
P&P	Policy and Procedure
RMA	Return Material Authorization
RSS	Remote Support Services
SE	Systems Engineer
TSC	Technical Support Center
VM	Virtual Machine