# **Klinik ProUI and Connect Customer Checklist**

# **Training Requirements**

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| **Item** | **Description**  | **Complete** |
| **T.1** | Super Users to attend Klinik Patient form, ProUI and Connect training session |  |
| **T.2** | Standard users to attend a Klinik familiarisation session covering Patient form, ProUI and Connect |  |

**User Setup**

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| **Item** | **Description**  | **Complete** |
| **US.1**  | Super users to set up all standard users |  |
| **US.2** | All users to familiarise themselves with the Klinik demo environment using:* The patient forms
* Professional user interface
* Connect
* Dashboard (for super users only)
* User administration (for super users only)
 |  |

* **Cease submitting test cases into the demo environment** **after 5 pm day prior to go-live**

# **System Access-NB all users access using Chrome as default browser**

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| **Item** | **Description** | **Complete** |
| **SA.1** | Check all standard and super users have access to the Professional Interface and Connect  |  |
| **SA.2**  | Check all super users have access to the Professional Interface, Connect and the Dashboard |  |

# **Platform Setup -** Check the platform meets with agreed set up format

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| **Item** | **Description** | **Complete** |
| **PS.1** | Are all the units added? |  |
| **PS.2** | Are the text boxes as agreed? |  |
| **PS.3** | Do the tiles direct to the agreed units? |  |
| **PS.4** | Advise Klinik if there are any changes in advance of the Go-live date |  |

# **Website & Communication**

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| **Item**  | **Description** | **Complete** |
| **WC.1** | Ensure web site designers have been informed that the Klinik Banner & Pop-up (if Using) are to be uploaded in a prominent position on your practice website and should be activated on the go-live date & time.  |  |
| **WC.2** | Identify key contacts within the practice to communicate with Klinik and ensure all communication is channelled through key contacts |  |
| **WC.3** | Ensure Klinik is clearly communicated around the practice using marketing materials provided and animation is available on waiting room screens & monitors |  |
| **WC.4** | Send out messaging to patients to make them aware of Klinik Access online platform. |  |

# **1 Day Prior to Go-live**

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| **Item** | **Description** | **Complete** |
| **1D.1** | Cease submitting test cases into the demo environment after **5 pm the day prior to go-live or line with agreed timeframe** |  |
| **1D.2** | Check and confirm user access for standard users* Are user rights correct?
* Can users see all units they need to?
* Have all users set up their accounts and passwords?
 |  |
| **1D.3** | Check and confirm user access for super users* Can super users access the Professional Interface, Connect and the Dashboard?
* Can super users see all units?
 |  |

# **Go-Live Day**

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| --- | --- | --- |
| **Item** | **Description** | **Complete** |
| GL.1 | Ensure web page designers have added the banner and the connection is working for patients |  |