

# CANOPY SUPPORT ENSURES IMPLEMENTATION SUCCESS

*Our mission is service excellence. Our market leadership ensures that the expertise and technology you need, both today and in the future, will be available and supported.*

The Canopy® solution can be fully installed in as little as ten weeks. We work closely with you, so that you have the assistance and guidance you need for all phases of your implementation.

## *Canopy's Client Information Library*

All Canopy Systems' customers first receive an e-mail with a link to Canopy's Client Information Library (CIL) and an assigned username and password is provided. The CIL offers a central location to obtain comprehensive documentation on the technical and care management elements of the Canopy solution. The Canopy Implementation Guide familiarizes your team with the Canopy implementation process, roles, responsibilities and timelines. The pre-implementation assessment forms help us tailor Canopy to meet the specific needs of your organization.

## *Clinical Kickoff Conference Call*

Once you return the initial assessment forms, we schedule a conference call to discuss the following:

- An organizational assessment that includes your reporting structure and current continuum of care components.
- Your approach to care management, including program goals, job descriptions, and staffing mix.
- The workflow for care management, including any assignment structure by service line, patient populations, or payors.
- An evaluation of all criteria and guidelines used.
- Suggestions for strategically streamlining your care management process using Canopy, including targeting specific populations, monitoring outcomes and productivity measures, and accessing Canopy both in the hospital and externally.

## *On-site Project Meeting*

The next step is to set the agenda, location, and participants for an on-site meeting. The on-site meeting typically covers the following:

- A general overview showing how Canopy integrates with your organization's care management process.
- A complete demonstration of the Canopy software solution.
- A working session to review the project tasks and timeline.
- A separate training session with the organization's administrator for Canopy.

## *Canopy Implementation and Customization*

After the on-site project meeting, we work with your team to customize the Canopy solution to meet the specific needs of your healthcare organization. The flexibility of the solution allows you to integrate your organization's assessments, guidelines, and workflow into Canopy. The process for customizing each module includes the following steps:

### *For Canopy UM®:*

- Define assignment workflow to determine screening options.
- Identify specific process and outcomes measures for tracking utilization patterns, readmissions, avoidable days, adverse events, denials, and appeals.
- Populate all user-defined lists in the product.
- Define the reporting requirements and distribution channels for the reports.



### *For Canopy CM®:*

- Define patient populations, selection criteria, screening methodology, and referral process for the case management program.
- Revise and enhance the current workflow process based on Canopy's unique capabilities.
- Create episode of care definitions and the appropriate assessment tool for each targeted population.
- Customize the guidelines and recommended plan of care for each population group.
- Populate all user-defined lists in the product.
- Define the reporting requirements and distribution channels for the reports.

### *ADT Interface Preparation*

The Canopy ADT interface solution accepts ADT transactions from your interface engine or ADT system and populates the corresponding fields in Canopy. Canopy's Client Services and operations staff works with representatives from your organization's information services department to establish a secure connection from your facility to Canopy's Data Center, and to configure and test the ADT HL7 interface.

### *User Training and "Go-Live" Session*

*We provide extensive on-site, hands-on user training and support, which includes:*

- Completing administrator training.
- Formal classroom training for all users tailored to their role.
- One-on-one support with each user during "go-live."

*We also conduct a Canopy user training follow-up conference call within two weeks of the "go-live" date to:*

- Determine progress on entry of additional Canopy patients.
- Discuss issues and questions regarding care management program workflows.
- Evaluate progress on using the selection and screening criteria, as well as the referral process, to identify target patient populations.

### *Post-Implementation Support*

To ensure the continued success of your Canopy implementation, we provide you with the following ongoing support capabilities:

- Follow-up after the "go-live" date at regular intervals, including one, three, six, and twelve months after the system is live.
- On-site visits, online training sessions, and conference calls as needed to provide ongoing support, training, and technical assistance.
- Review of future features and functionality requests.
- Setting goals for the following year related to enhancing the organization's care management programs.

Our customer support capabilities include toll-free support lines and paging on a 24/7 basis. Using Web-based tools, our customer support representatives work with you to resolve issues or to route them to the appropriate personnel. In addition, we conduct periodic customer satisfaction surveys to pinpoint areas of concern and to ensure that we continue to meet your patient care management requirements.



***For More Information on our comprehensive support capabilities, please contact Canopy Systems:***

**[p] 1-800-757-1354**

**[w] [www.canopysystems.com](http://www.canopysystems.com)**