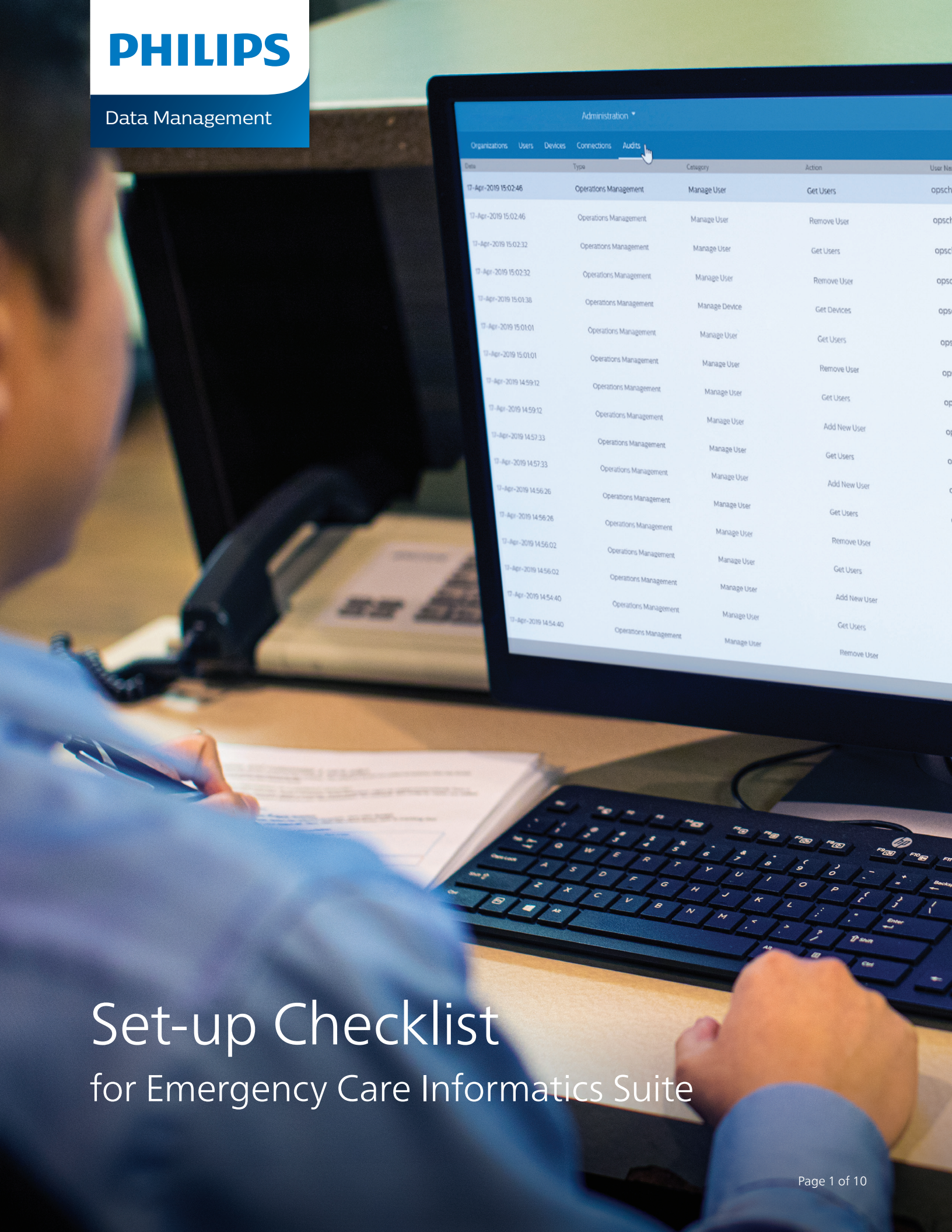
PHILIPS

Data Management



Set-up Checklist

for Emergency Care Informatics Suite

This checklist is designed for those who are working with customers to set-up accounts for Emergency Care Informatics Suite (ECI) Event Review and Emergency Care Informatics Device Readiness. It also will assist with adding the Storage feature for ECI and adding license renewals for any of the products. Please read this entire document before starting.

Prior to initiating set-up

Determine who will be the primary Technical Contact for the account. This email is associated with the account and is the Administrator created during account set-up. The Technical Contact can be changed after the account is set-up if it needs to be changed to another person.

> **WARNING:** Every customer account requires a unique email address for initial set-up. If you have previously set up an account and are not adding a service to that existing account, you must either 1) use a different email address to avoid tying customer accounts together, or 2) ensure that you are fully deleted from the previous account.

New Account Set-up and Product Registration

If you have already set up an account and need to add or extend a service to an existing account, skip to the section, "Add a service".

☐ Step 1

Have your Welcome Letter in front of you. You will need the Serial Number (SN) and Product Number (PN) from the cover page of the welcome letter, as indicated below in Figure 1.

- **Verify** that the license description on the front page is accurate and matches the purchase order.
  - Distributors should retain a copy of the license from the Welcome Letter (Figure 1) and write the customer organization name on the letter. This will assist with future troubleshooting.
  - Licenses come with different lengths of time. (See Figure 1) For example, if you are setting up a 1 Year License ensure that this is on the Welcome Letter and that you are not accidentally using another license with a different term or in the case of Event Review, with a different number of devices allocated to the license.
  - If the Length of the contract or the number of devices on the license/Welcome Letter you are referencing is not correct, STOP IMMEDIATELY and notify the distributor as you have been given the wrong license.
    - If you plan to use a **Trial license**, set up the account using the Trial license FIRST. Only after the Trial period has ended should you enter your organization's term license information. To add the term license after a Trial license, follow the instructions as indicated in the **Add service** below.
    - If you are adding a Trial for an additional service, such as Device Readiness, **after your initial account set-up**, follow the instructions in Add service below.
- It is recommended to write the organization name on the Welcome Letter and to double check the information with the purchase order.
- If you are setting up only a Device Readiness account, you will use one license letter for set-up and the other license letters will follow the Add a Service indicated below in Figure 8. Each device requires a license.

WARNING: Each SN/PN can only be used one time. You must finalize set-up after you initiate it.

Figure 1

☐ Step 2

From a computer with either a Google Chrome™ or Microsoft® Edge internet browser, enter **www.philips-emergencycare.com** and you should see the web page on the right in Figure 2.

Click the **Register** link, as shown in Figure 2 (red outline is for directional information and does not appear on the web page).

Figure 2

☐ Step 3

Enter the Serial Number (SN) and Product Number (PN) found on the Welcome Letter into the fields that correspond in the screen in Figure 3.

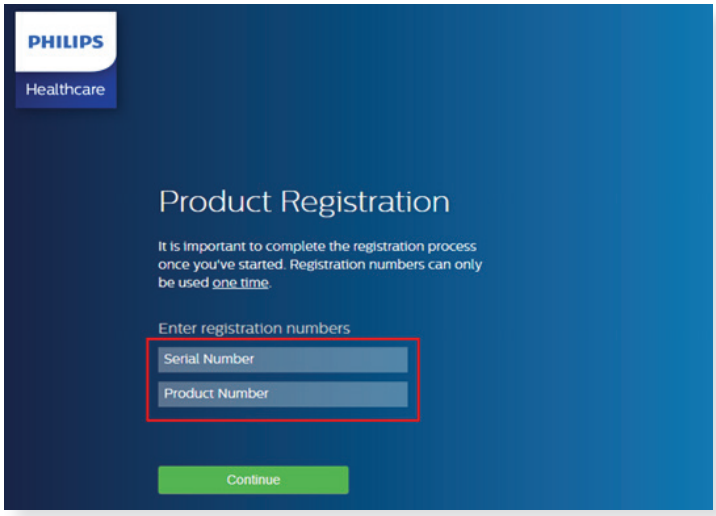


Figure 3

☐ Step 4

For the **New Account**, click the **Set up Admin** button as indicated in the screen in Figure 4.

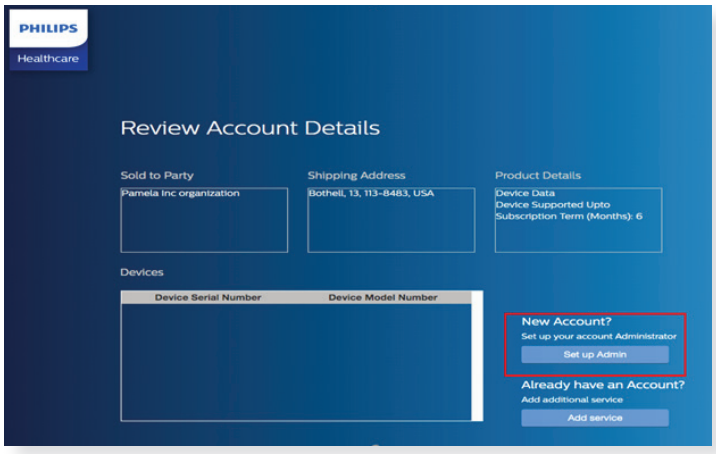


Figure 4

☐ Step 5

After clicking the **Set up Admin** button in Step 4 above, you will be taken to the **Administration Registration**, as indicated in Figure 5, on the right.

Warning: The email used must not be used for another Emergency Care Informatics account.

- Enter the email for the person who will be Technical Contact and Administrator for account creation. This person can be changed at a later date if required.
- Enter the first name, last name, language preference and time zone.
- Enter a password. If the password is forgotten a new password can be set by clicking the **Forgot Password** text show on the log in screen, as indicated in Figure 2.
    - If you have issues resetting the password, contact your distributor to engage with a Philips representative. Provide the distributor with the name of the Administrator/Technical Contact and the name of the customer's organization. It is also helpful to have the Customer ID from the Organization tab. If you are a distributor who is setting up a customer account contact your Philips representative.
    - If the account was set-up with an incorrect email address, contact your distributor to engage with a Philips representative and provide them with an approximation of the incorrect email address so it can be located and the name of the person the account was associated with. Also provide what the correct email and account contact information should be. It is also helpful to have the Serial Number used for the account set-up, which can be retrieved from the Welcome Letter.
- Click the **Register** button to complete registration.

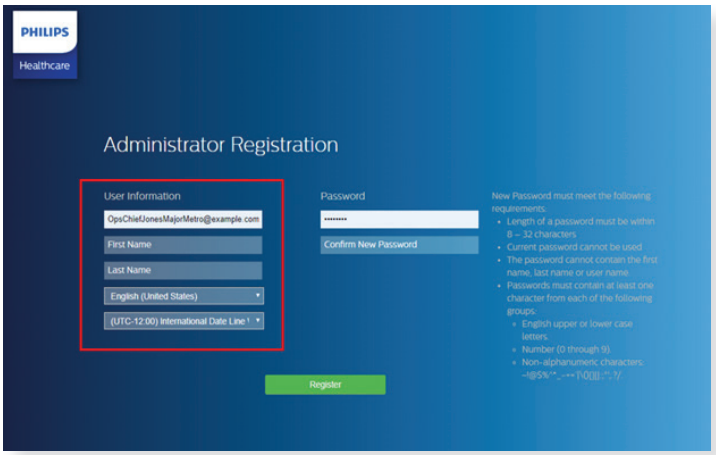


Figure 5

☐ Step 6

You will now see a screen that confirms that registration is successful, as shown in Figure 6.

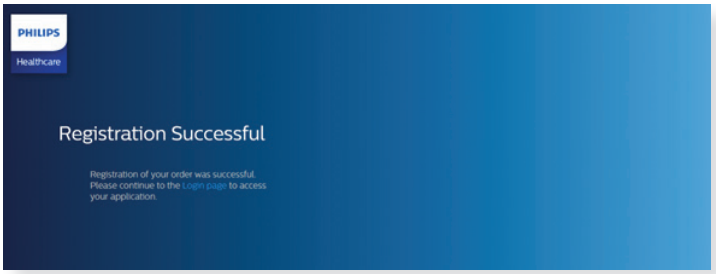


Figure 6

Add a service

Adding a service allows you to do any of the following:

- To **move from a Trial account to a paid license** without losing your set-up information, you must add the license key which is the Product Number (PN) and Serial Number (SN) displayed on the cover of your Welcome Letter, in the Add a Service workflow.
- To add a new license **after your initial license expires**, you must do so through Add service.
- To add the **Unlimited Storage** option to your account, you must do so after your initial account set-up and through Add service.
- To add the **Device Readiness** functionality to an ECI Event Review account, it must be added after the initial account set-up. Device Readiness licenses must be added for each device.

Adding a service must done by the Technical Contact of an Organization. The email of the Technical Contact will tie the new service to the account. Verify who the Technical Contact of the Organization is. To do this you must log into the account and choose the Administrator role if it is not your default role. See Figure 7. If a different Administrator is adding services, they must be listed as the Technical Contact for that task. The Technical Contact can be changed in the screen indicated in Figure 7.

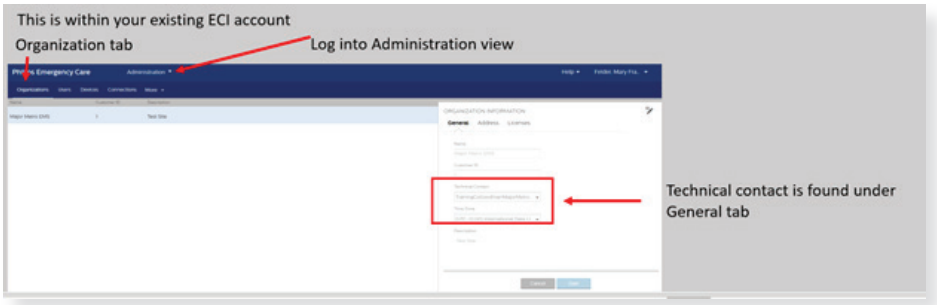


Figure 7

After you have verified your organization's technical contact, **log out of Emergency Care Informatics Suite**. Return to pages 2 and 3 and follow Steps 1-3 to add an additional service. Once you have completed step 3, you will see Review Account Details page, see Figure 8. Click on "Add a service" and follow the directions below.

Upon clicking the Add service button, you will be prompted to enter the Administrator who is the Technical Contact for the Organization and their password, as shown in Figure 9.

WARNING: Entering the wrong email address will render the license invalid and you will need to contact your distributor to engage with a Philips representative for support to order a new license. **It is important to ensure that the email entered is the Technical Contact for the Organization** as indicated above in Figure 7.

After clicking on the **Register** button you will get the confirmation page illustrated in Figure 6.

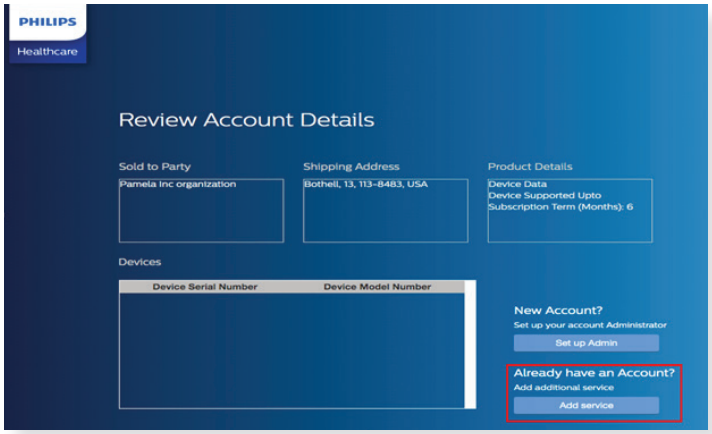


Figure 8

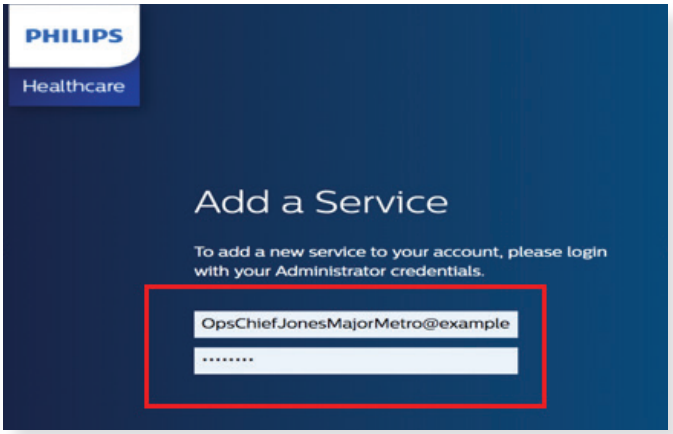


Figure 9

Troubleshooting

☐ **Verify**

Verify the license before you start by ensuring that the terms listed on the Welcome Letter are the same as those you purchased. If the description on the license does not match stop immediately, contact the distributor to get the correct license.

☐ **Document**

Write the name of your Organization, Customer ID, Technical Contact on the Welcome Letter. Save this letter for your record (it's OK to save a digital copy). Always verify the Technical Contact prior to Adding Service.

☐ **Account contact**

- Identify the email to be used for setting up the account.
- *If you are a distributor setting up the account for a customer, the email cannot be associated with another customer's account. If it is used for another customer use a different email.*
- The email used for set-up will by default be the Technical Contact. The Technical Contact can be changed when logged in as an Administrator.

☐ **Email/Password**

- If you simply forgot the password and there is not an issue with the email address, click the **Reset Password** text on the log in screen.
- If you used an email where the password cannot be retrieved and you need to reset it, you must contact your distributor to engage with a Philips representative to update the email. Having the following information available is helpful: the name of the Organization; the name of the person set up as Technical Contact; what you think the email for set-up was; and Serial Number from the Welcome Letter.

☐ **Trial Account**

Set-up the Trial Account first. **After the Trial Account expires add the term license.** Do not add the Trial after you set up the account or you risk overwriting the paid license for the account.

☐ **Registration error**

The Serial Number can only be used one time and you must complete set-up once it has been initiated.
If you get an error message that the Serial Number is not correct, ensure that the correct Serial Number and Product Number were entered. Verify this information against your Welcome Letter.

☐ **Intrepid not showing**

- Confirm that you have entered the Customer ID from the Organization tab into the Intrepid configuration.
- If the Customer ID is entered into Intrepid correctly and the device is still not showing up, ensure that the Intrepid has never been paired with another customer account. If it has been paired with another customer account provide the Intrepid Serial Number and your organization name and Customer ID to a Philips representative to troubleshoot the issue.
- NOTE: Three unsuccessful log-in attempts will lock the users account. An Administrator can unlock the accout. If there is a single Administrator who is locked out, contact your Philips Representative.

☐ **Contacting a Philips representative**

If you are a customer who is experiencing issues outlined here or if you have other concerns, contact your distributor to engage with Philips. Ideally provide the Serial Number and Product Number from the Welcome Letter, the name of the organization, the email and name of the Technical Contact for the organization along with a summary of the issue. This web-based application is designed to be self-service however there are a few issues which need direct engagement by the team at Philips.

Technical Contact name	
Technical Contact email used for Registration	
Organization Name	
Organization ID (if available)	
Product Number	
Serial Number	
Intrepid Serial Number	
License Description	
Number of Devices	
Philips reference ID (internal use)	
Length of contract/Terms	
Complaint/Issue	

☐ I confirm that all of the above issues have been investigated with the customer.

Distributor	
Contact Name	
Contact Email	
Contact Phone	

Distributor Use Only

If you are a distributor who is experiencing issues setting up an account as outlined above or if you notice other issues, please provide the Serial Number and Product Number, name of organization and a summary of the issue to your Philips representative for escalation.

Registration

What if, while setting up an account for a customer, I enter the wrong license for a customer, such as a three-year license when they ordered a one-year license?

- If you are setting up the customer account and have made yourself the technical contact for the organization during set-up, you can enter the one-year license as if you are Adding a Service. This will overwrite the three-year license. However, you will need to contact Philips to replace the three-year license. In doing so you will need to fill out the form above and provide both the one year and three-year license SN.

Why can't I use the same email to set-up multiple customer accounts?

- The account is tied to the email of the user listed as technical contact for an organization. If you have used your email before you will tie different customer accounts together by using your email again. Use a different email for each set-up.

What do I do if I accidentally set up an Intrepid under the wrong customer account?

- You will need to use the form above and contact your Philips representative. You will need the Intrepid serial number. For now, once an Intrepid is paired to a customer account it can only be moved manually. After you hear back from Philips you can change the Account ID within the Intrepid configuration to the correct Organization ID, as seen in the software.

Why does the customer need a license for each Intrepid for Device Readiness and each AED for Remote Monitoring?

- The system requires that each device have a license. There may not be an immediate failure but there will be when the system checks itself. Ensure there is a license for each device.
- The Event Review functionality is currently tiered by number of devices and does not require a license for each device.

Why does the customer need an Emergency Care Patient Care Reporting license?

- The customer only needs a Patient Care Reporting license if they want to integrate the data to another system such as an ePCR or EMR. You can find integration information under Help -> Developer Tools within the software, including your distributor demo account.

Administration

How do I change the Technical Contact for the Organization to the customer's administrator when I am ready to hand-off the account?

- You must first set up the customer's administrator as a user and give them the role of Administrator. You can then return to the Organization tab and choose the user from the drop down under Technical Contact.

What is the difference between setting up an Administrator for a site verses an organization?

- Sites are a subset of an organization. An Administrator with site access can control the users and permissions for that site. The Administrator on an organization level can work across sites as needed.

I set up a user with the Device Readiness role and want to restrict them to a single site.

- You will need to delete the user and add them to the site. Do this by going to the organization tab, choose the site under the organization you want to restrict the user's access to and add the user to that specific site by then going back to the Users tab to add the user.

Dashboard

What if a customer's devices are not showing in the Device Readiness dashboard?

- For Intrepid, confirm that you have entered the Customer ID from the Organization tab within the Administration section of the software into the Intrepid configuration where it requests Account ID.

HeartStart Intrepid Monitor/Defibrillator
Philips Goldway (Shenzhen) Industrial Inc.
Registered/Production address:
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