

# INSTALLER INSTRUCTIONS HEALTHY ADVICE NETWORKS EDUCATIONAL DISPLAYS

Revised 9/22/09

## **Healthy Advice Exam Room Programs (ERP)**

Most of the Healthy Advice installations are for the Exam Room Programs (ERP). These are educational displays that are installed in the exam rooms of the physicians' offices. The displays are not to be mounted in hallways or waiting rooms.

The product lines (types of programs) for the ERP are:

- § **HAF** - Healthy Advice for You and Your Family (Primary Care Physicians)
- § **HAC** - Healthy Advice for Your Child (Pediatricians)
- § **HAD** - Healthy Advice for Digestive Wellness (Gastroenterologists)
- § **HAU** – Healthy Advice – Urology (Urologists)

Please refer to Pages 10-12 for pictures of the educational display used for each program.

## **Appropriate Dress and Conduct at Healthy Advice Locations**

The physician's office is a professional environment, and installers will be expected to present themselves and conduct themselves in a professional manner.

### **Installer Conduct**

- § Never open an exam room door (wait for assistance from the office staff).
- § Be courteous to office staff; do not use profanity or disrespectful language.
- § Keep noise to a minimum.
- § Clean up drywall dust, cartons, and debris when the installation is complete. Dispose of the debris off-site, unless you have permission to dispose of it in the office dumpster.

If there is a disagreement or refusal to allow the installation, do not argue with the staff. Use the appropriate reason code on your work order and return it to your supervisor.

## **Tools Needed for Installation of the Educational Displays**

The installer should have the following tools available for installation of the displays:

- § Cordless drill with a drill stop; drywall and masonry bits
- § Slotted and Phillips-head screwdrivers
- § Small bubble level
- § Tape measure
- § Stud Finder
- § Small hammer or rubber mallet
- § Spackling paste and putty knife
- § Whisk broom and cotton towel
- § Utility knife

## **Preparation for the Site Visit**

Prior to visiting the physician's office to install the educational displays:

- § Verify that you have the correct number and type of Healthy Advice displays and update kits, if applicable. The number and type of displays needed for the installation will be noted on the work order, and cartons containing the displays should be marked with the appropriate program name for the type of display packed inside.
- § Ensure that the displays are in good condition and that no damage occurred during shipping. If a display is damaged, please call your supervisor to report the damage.

## **Setting the Installation Appointment**

Under no circumstances should the installer attempt an installation without having a pre-arranged appointment. The appointment is to be made with the contact provided on your work order. The work order also includes contact's phone number and the "best time to install".

Even though the "best time to install" is in the file, a specific appointment must be made before going to the medical practice. Installers arriving at the physician's office without an appointment will not be paid by Healthy Advice.

The installation appointment should be scheduled in the following manner:

- § Make at least three attempts to speak with the Office Contact over a period of three to four business days (immediately upon receiving the HAN displays).
- § With each call, give the Office Contact approximately 24 hours to return the call before calling back.
- § The script on the following page should be used for scheduling the installation appointment. (The information in parentheses should be filled in from the information provided on the installer's work order.)

## **SAMPLE SCRIPT:**

May I please speak with \_\_\_\_\_ (contact name that appears on your Work Order)?

Good morning/afternoon this is \_\_\_\_\_ calling for **Healthy Advice Networks** (complete program name on work order). During the last few weeks, (name of the HAN Sales Rep and name of "Who Approved the Enrollment" on work order) enrolled your office in the Healthy Advice Program to receive our FREE patient education program for your exam room(s). The program includes an exam room display(s) and take-home educational brochures for your patients.

I'd like to schedule an appointment to install the educational display(s) in your exam room(s). I will need access to the exam room(s) in order to mount the display(s); it will take approximately 15 minutes in each exam room. What day and time would be convenient for you? If you are unavailable the day I come, who should I speak to when I arrive?

Prior to my arrival, please identify the exact location where you want each display to be installed. When doing so, please remember that I can mount the displays only in exam rooms; they cannot be placed in the waiting room or hallway. Please be sure to let others in your office know that I will be installing the HAN displays, just in case you are not available.

If you have any questions before the installation, please call the Healthy Advice Customer Service department at **800-284-8314** 8:30 a.m. – 5:30 p.m. Eastern Time. Thank you for your time. (Installer: The Healthy Advice number is shown on your Work Order).

**(If they don't seem to know what you're talking about)** At the time of the enrollment, \_\_\_\_\_, (name of the HAN Sales Rep) left a picture of the Educational Display, along with instructions for setting the installation appointment. Do you recall receiving this?

**(If they still don't know what you're talking about)** Thank you for your time. Someone from the Healthy Advice Networks will be in touch with you to reconfirm your practice's participation in the program and answer any questions you may have.

### **(CANCELLATION - If the practice indicates they no longer want the displays)**

May I ask why you wish to cancel? Ok, I will notify Healthy Advice Networks of your desire to cancel from the program, and they will call to confirm your cancellation request. Thank you for your time.

If the attempt to set an appointment fails, the installer should select one of the Phone Appointment Failure Codes (P-Codes) below, note it on the work order, and return the work order to their supervisor.

### **Phone Appointment Failure Codes (P-Codes):**

- § **P1- NO KNOWLEDGE.** Spoke to the Office Contact but he / she had no knowledge of plans to install the Healthy Advice program.
- § **P2 - MAX PHONE ATTEMPTS.** Can't reach Office Contact after leaving 3 messages over a period of 3 or 4 business days.
- § **P3 - NOT WANTED.** The Office Contact or Doctor decided they do not want the Healthy Advice program (for whatever reason). If a reason is provided, please add those comments to the work order in the "Comments" section.
- § **P4 – DELAYED INSTALLATION.** The practice wants the installation delayed due to moving, remodeling, vacation, or they have already moved to another address. (modified 7/9/09)
- § **P5 - INCORRECT PHONE NUMBER** provided by Healthy Advice in the work order.
- § **P6 – DOCTOR HAS NOT APPROVED** installation of the Healthy Advice displays.

### **Installing the Displays**

Upon arriving at the physician's office at the scheduled appointment time:

- § Check in with the Office Contact and have the contact direct you to the exam room(s) where they want the educational displays installed. (Note that it may be necessary to wait for exam rooms to become vacant before the installations can be done. Never open a closed exam room door to check!)
- § Using the installation template provided by Healthy Advice, mark the three screw locations. Mount the display at the height indicated on the installation template, or at the height directed by the Office Contact.
- § Use a level to confirm that the two upper holes are level with each other. If possible, use a stud-finder to locate a wall stud, and anchor at least one of the anchor/screw sets into the stud.
- § Note that all of the displays have a third pre-drilled mounting hole (at the bottom of the display). A screw must be used in the third mounting hole also. Insure that all screws are seated into the screw keyholes on the back displays. **It is very important to use the screw anchors in all three holes, and seat ALL screws into the keyholes, in order to secure the display to the wall.**

- § If the installation template is not used, it will be necessary to remove the plexi-glass panels covering the ad panels in order to expose the pre-drilled holes in the display.
- § Use a soft cotton towel to remove any dust or dirt from the display prior to stocking the printed materials. Place all program headers and ad panels in the display and replace the plexi-glass panels (if they had been removed). Place the brochures in the appropriate brochure pockets (according to the instructions provided by HAN).
- § Leave unused brochures with the Office Contact. Clean up your work area (remove all cartons and debris and dispose of off-site). Do not ask the Office Contact to discard the waste.
- § Note on the work order where each display was installed (i.e. Exam Room #1, Exam Room C, etc)
- § Following installation of all displays, the installer must fill out the Work Order and obtain the Office Contact's signature.
- § Explain to the Office Contact that there is a toll free number available to reorder materials. The Healthy Advice toll free number is 1-800-284-8314. (This number should not be used by installers.)

## On-Site Cancellation Codes (OS-Codes)

If the installer shows up at the scheduled appointment time, and is still unable to install the displays, one of the following reason codes should be selected and reported on the work order.

- § **OS1- TOO BIG.** Display is “too big” or there’s no room for it in the exam room.
- § **OS2- NOT EXAM ROOM.** Office will not allow installation in exam rooms (or wants displays installed in hallways or waiting room)
- § **OS3 – DELAYED INSTALLATION.** The practice wants the installation delayed due to moving, remodeling, vacation, or they have already moved to another address. (modified 7/9/09)
- § **OS4 - TOO BUSY.** Installer arrived at appointment time but the office was too busy; Office Contact asked to reschedule.
- § **OS5 - OFFICE CLOSED.** Installer arrived at appointment time but office was temporarily closed (due to vacation or an unscheduled closing).
- § **OS6 - NO KNOWLEDGE.** Spoke to the Office Contact but he / she had no knowledge of plans to install the Healthy Advice program.
- § **OS7 – DOCTOR HAS NOT APPROVED.** Office Contact made the appointment, installer arrived at appointment time, but Doctor will not allow the installation.
- § **OS8 -DON’T LIKE;** The Office Contact or Doctor did not like the way the display looks (color, style, advertising, or brochures) when the installer arrived on site.  
  
If a reason is provided, please add those comments to the work order in the “Comments” section.
- § **OS9- POOR WALL CONSTRUCTION.** The installer determined that display(s) could not be safely installed due to the construction of the walls (or construction of the doors if attempting an over the door mount).
- § **OS10 - INCORRECT ADDRESS** provided by HAN.
- § **OS11 – CONTACT NOT THERE.** Contact was not there at the appointment time.
- § **OS12 – DOES NOT WANT HOLES IN WALLS.** The Office Contact or Doctor has decided that they don’t want holes drilled in their walls. (added 9/21/09)
- § **OS13 – OVER-THE-DOOR (OTD) SELF-INSTALL.** The practice agrees to self-install using the OTD mounting brackets. (added 9/21/09)

## **Over-the-Door Mounting Brackets**

From time to time, you may be requested to install the educational display on a door instead of mounting it on the wall. (See attached photos.) If the display is to be mounted on a door, you will be sent an Over-the-Door (OTD) mounting bracket kit consisting of:

- Two mounting brackets
- Removable rubber spacer (to adapt for thicker doors)
- Door stop (for mounting on hinges)
- Instructions

When making this type of installation:

- Never drill holes in the door.
- If the OTD mount appears unstable, remove it and report it as a failed appointment
- Do not use the OTD mount if it will scratch doors or door jambs.

## **“Saving” the Location by Using Over-the-Door (OTD) Mounting Brackets** **(added 9/21/09)**

Situation: The practice does not want the displays because they do not want holes drilled in the walls. The installer should follow these procedures:

- Call Healthy Advice Networks **1-888-201-2173** to speak with a Practice Relations (PR) representative.
- Explain that the office does not want holes in the wall. Ask the HAN PR representative to speak with the Office Contact. Wait until the PR representative and Office Contact have spoken. (If the contact is not available to speak with a HAN representative, installer will submit the work order as Canceled On-Site visit using OS12-DOES NOT WANT HOLES IN WALLS).

**The conversation between the HAN PR representative and the Office Contact will have one of the three following outcomes: The action taken by the installer will depend upon the outcome:**

**Outcome 1:** The Office Contact agrees to self-install using the OTD mounting brackets.

- Installer will leave the displays with the Office Contact.
- Installer will submit the work order as a Canceled On-Site Visit using OS13-OTD SELF-INSTALL.

**Outcome 2:** The Office Contact wishes to use the OTD mounting brackets, but wants the HAN installer to install them.

- Installer will keep the displays with him/her until receiving the OTD bracket kits..
- Installer will submit the work order as a Canceled On-Site visit using OS12- DOES NOT WANT HOLES IN WALLS.
- The OTD installation order will re-process to the installer, HAN will ship OTD kits to the installer, the installer will return to the location with the displays and the OTD kits to install the displays on doors.

**Outcome 3:** The Office Contact and Doctor have decided that they do not want the displays on their walls or on their doors.

- Installer will submit the work order as a Canceled On-Site Visit using the appropriate OS Code, and take the displays with him/her.

### **Removals, Replacements, and Remounts**

Healthy Advice may request that displays be removed, replaced, and/or remounted.

#### **Removing Existing Educational Displays**

- The work order will indicate a Display Removal quantity.
- Check the condition of the wall behind the display before removing it. Inform the Office Contact if the paint or wallpaper is different behind the display.
- Remove all brochures from the display and lift the display straight up and out
- Remove the screws and the anchors
- Neatly spackle the holes (no sanding or painting required)
- Dispose of the display and debris offsite, unless the office gives you permission to dispose of these items on-site.
- If you are removing a white plastic Healthy Advice display, you will need to access the mounting screws by removing the plexiglass cover and panels at the top and bottom of the display.

## QUESTIONS & ANSWERS

**Q. I received displays that were damaged, what should I do?**

A. Call your installation supervisor to report damaged displays. New displays or display parts will be shipped to you to complete any outstanding work orders. A display with broken brochure pockets, missing plastic poster covers, or scratched poster covers is a display for which replacement parts can be shipped. If the white or silver frame of the display is cracked or broken, it is non-salvageable.

**Q. Does the display have to be installed in a certain location?**

A. Yes, it is a program requirement that displays be placed in patient exam rooms. NO EXCEPTIONS. Ask your Office Contact where, in each exam room, they would like to have the displays mounted.

**Q. The office wants the display installed somewhere else.**

A. If you are instructed to place a display in a hallway or other area of the office, please inform the office contact that you are not authorized to install it there. Ask the office contact to call Healthy Advice at **800-284-8314**. Report this office visit as an On Site Cancellation (OS2).

**Q. Does the display have to be wall mounted?**

A. Yes, unless the practice has been pre-approved for an Over-the-Door mount. If Healthy Advice has not shipped an OTD mounting kit to you, they are assuming that the display will be mounted on the wall of an exam room. If the office contact refuses to have the display mounted on the wall, report it as an On Site Cancellation (OS2) and have the office call Healthy Advice at **800-284-8314**.

Due to the design of the display, it will not stand alone. The display should never be left leaning against a wall or a cabinet.

**Q. Can I leave a display at an office that wants to install it themselves?**

A. No. If the office won't allow installation, please take all displays with you. Ask the office to call Healthy Advice at **800-284-8314**. Report this office visit as an On Site Cancellation (OS2).

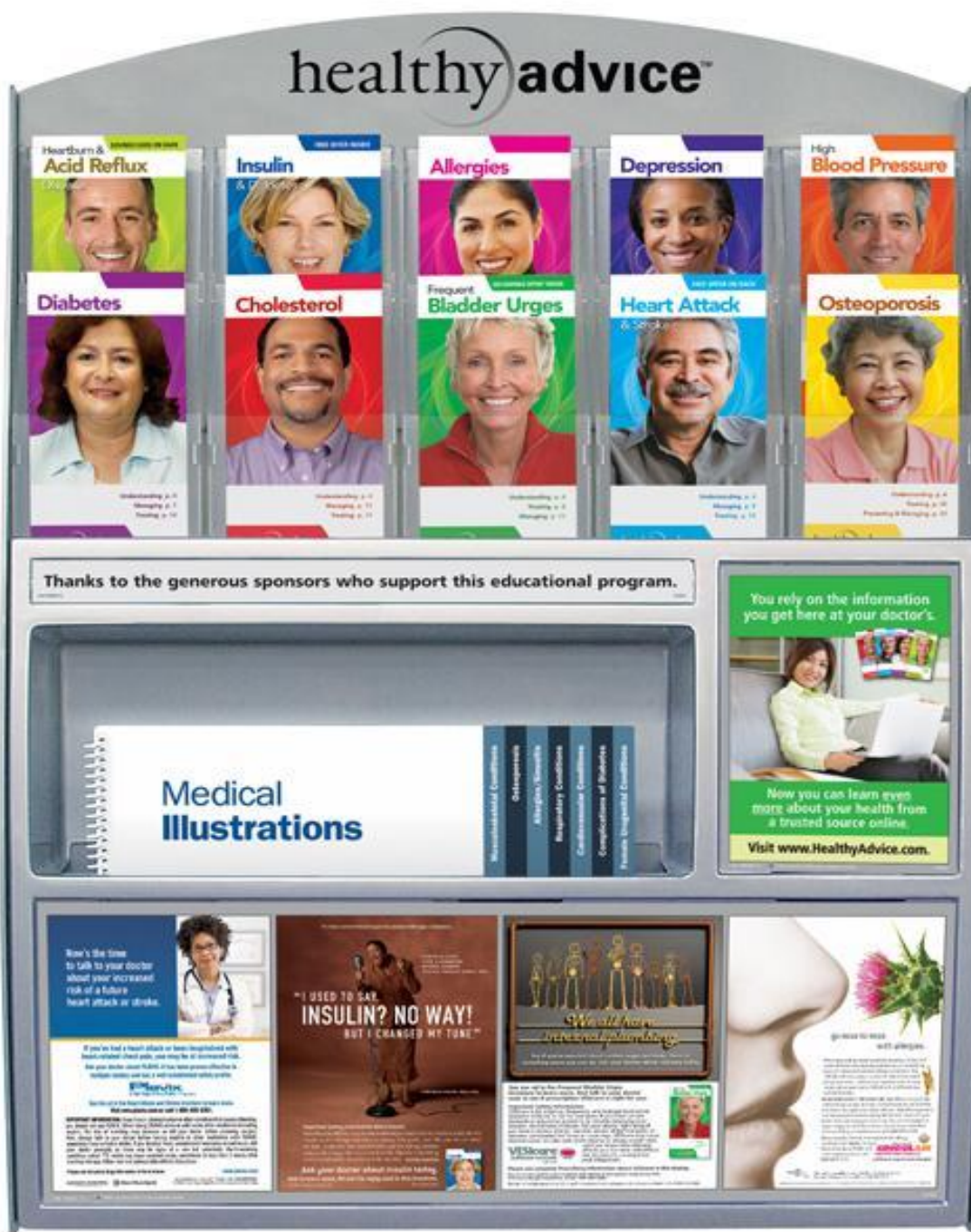
**Q. When I called to schedule the installation appointment, the office contact didn't know what I was talking about.**

A. If the office contact doesn't recall the program after attempting to "refresh" their memory (see appointment setting sample script), please report this as a Phone Appointment Failure (P1) with the appropriate comments added to the work order.

**Q. When I called to schedule the installation appointment, the office said they were no longer interested in the program.**

Report this as a Phone Appointment Failure (P3) and record the appropriate comments on why the practice indicated they wanted to cancel. Healthy Advice Networks confirms all reported cancellations.

- Q. When I arrived, the office decided they don't want the displays at all or wanted fewer than were ordered.**
- A. If the office doesn't want any displays at all, record this as an On-Site Cancellation (using the appropriate OS code) and record the appropriate comments. If the office wants fewer than ordered, install the quantity the office wants and record this number as the quantity installed on your work order. Please indicate in comments why the other displays were cancelled.
- Q. When I arrive, the office decides they want more displays than they originally ordered.**
- A. Only install the quantity indicated on your work order. Record in comments that the office is requesting additional displays. Also, ask the office to call Healthy Advice at 800-284-8314 to request the additional displays.
- Q. The office ordered 2 displays and wants one installed at the address on the work order and the 2<sup>nd</sup> one installed at a satellite office.**
- A. Only install display(s) at the address provided and record the installed quantity on your work order. The satellite office needs to be enrolled into the program through Healthy Advice Networks. Ask the main office to call Healthy Advice at 800-284-8314 in order to enroll the satellite office.



## 10-Pocket Silver Display

Used for HAF (Healthy Advice for You and Your Family)  
60000 A and 60000 B

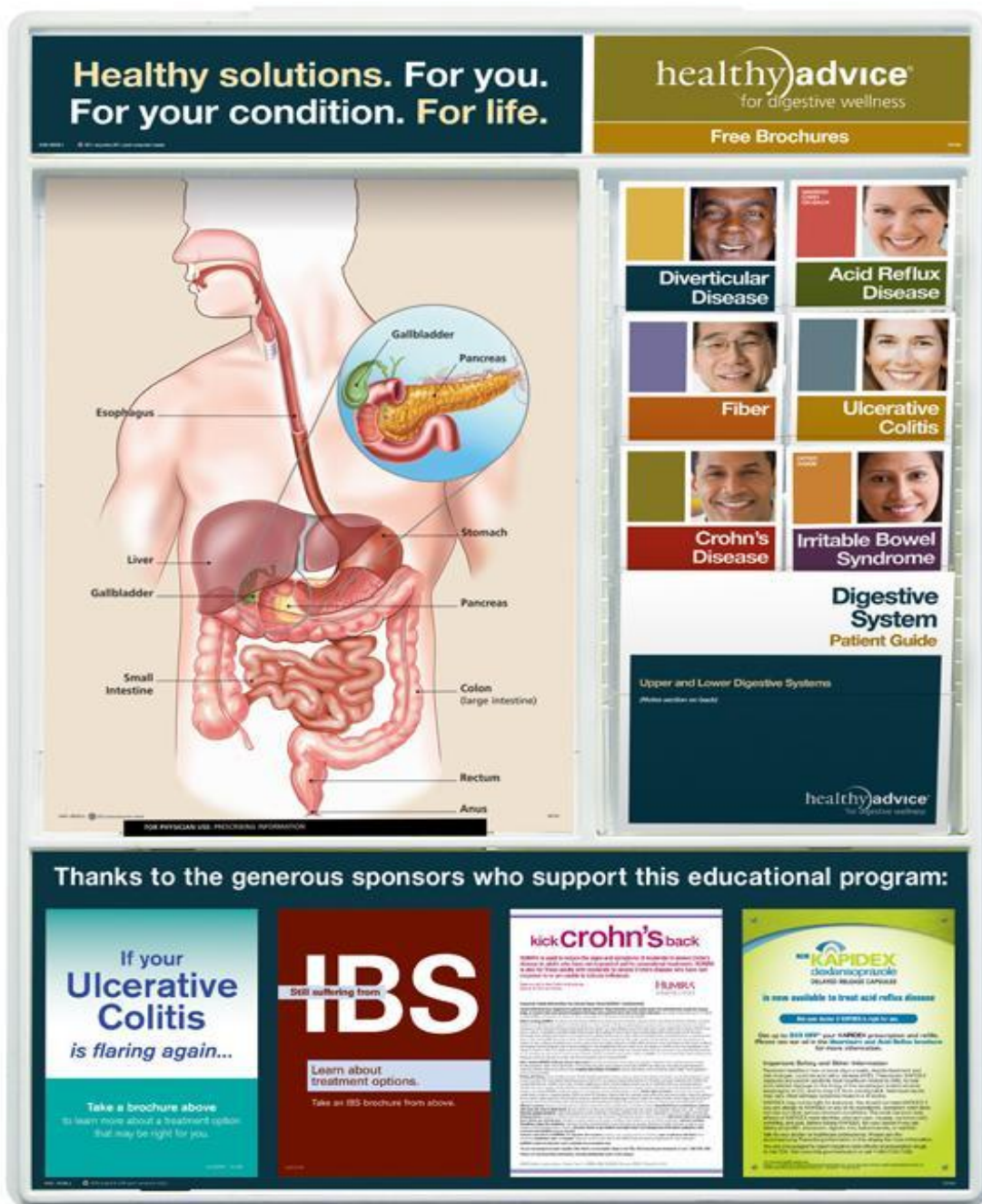
(Print materials may vary from picture shown above.)



## 8-Pocket Silver Display

Used for HAC (Healthy Advice for Your Child) - 70000 A and 70000 B  
 Used for HAU (Healthy Advice Urology) – 31000

(Display shown is HAC. Print materials will vary depending upon program.)



**White 6-pocket Display  
(with oversized 7<sup>th</sup> pocket)**

Used for HAD (Healthy Advice for Digestive Wellness) 99100

(Print materials may vary from picture shown above.)



**Over-the-Door Mounting Bracket  
(with 10-Pocket Silver HAF Display)**



**Kit for Over-the-Door Mounting Brackets (carton, instructions, brackets and hardware)**