SHM Upgrade & Training Guide

FOR EXISTING CLIENTS

Hello and welcome to a guide for upgrading and training for your Frontline School Health Management (SHM) solution to version 6.1.1. We know you are eager to get started. We are eager for you!

To help set expectations and gain an understanding of what you can expect, please review the following Upgrade & Training Guide. You'll learn about your upgrade stages & the training process, including what you can expect and the purpose of each. Based on the many variations of how districts are using the solution, there may be situations where the upgrade stages and steps are altered. Watch for additional email communications from your Upgrade Consultant which will explain adjustments to your project based on our additional understanding of your district's specific plans and needs.

Upgrade Summary

Here is a summary of the upgrade stages you'll complete. Review the second page for specific details.

Implementation Consultant

| Project Launch | Requirements & Data Gathering | Configuration | Training & Rollout | Go Live | Implementation Complete |

Detailed Upgrade Process

Stages	What to Expect	Purpose
Project Launch	Frontline will send an email to your primary contact with: A survey to complete for Frontline to learn about your timeline goals and usage expectations. Request your primary IT resource contact details. Your IT resource contact will receive a separate email: *- With a request for specific data import files based upon the functionality they will be using.*	Provides Frontline with an understanding of your timeline goals, data files and your usage expectations.
Requirements & Data Gathering	Your IT resource will: Follow the sFTP process to upload your new data import files.	FL technical staff will request files based upon the functionality you will be using.
Configuration	Once your data import file(s) have been successfully imported, by the Frontline technical team, you will receive an invite for scheduling your upgrade session.	Frontline walks your system administrator(s) through the upgrade including new configuration requirements.
Training & Rollout	Upon completion of your district's upgrade, the system administrator should contact the end-users to sign-up for a Virtual session on the Introduction to COVID-19 functionality and any other applicable learning services.	Your district has completed the end user training and are prepared for using the solution.
Go-Live	As an existing client, you will be live once your system administrator completes the configuration session. See the training process following for additional learning formats.	Your district's users can now document their day-to-day tasks and use the daily COVID survey within the SHM solution.

Training & Learning Process

The following learning paths are organized by format and aligned with the different roles in your organization, related to your upgraded Frontline School Health Management solution. The purpose is to describe the available learning opportunities, from self-paced to on-demand resources, all designed to support your organization to successfully use your upgraded solution.

Learning Format	Health/Mental Health Professionals (primary SHM end users)	COVID-19 Case Managers/Team (e.g. tracking faculty/ student compliance)	Health Educators (re: COVID-19 PD)	Leadership (e.g. building & central office admins)	Faculty/Parents/ Students (using the Mobile App/Portal)
Help Resources	Help Site Purpose: to access on-demand learning resources What: all Help resources including Guides & Articles	Help Site Purpose: to access on-demand learning resources What: most applicable resources to search: – "COVID-19" – "Health Portal" – "Mobile App"	Help Site Purpose: to access on-demand learning resources What: most applicable resources to search: – "Education Session" – "COVID-19" – "Health Portal"	Help Site Purpose: to access on-demand learning resources What: most applicable resources to search: – "COVID-19" – "COVID-19 Faculty/Parent Videos" – "Health Portal" – "Mobile App"	Help Site Embedded Portal or Mobile App Help Purpose: to access on-demand and embedded learning resources What: most applicable resources to search: – "COVID-19 Faculty/Parent Videos" – "Health Portal" – "Mobile App"
Live/ Recorded Webinars	Health Role Purpose: to deepen learning via guided optional support that is the same content as the "Virtual Service: Comprehensive End User Functionality". What: 30 min. live session, then 15-20 min. recording posted to Help site	Case Manager Role Purpose: to deepen learning via guided support for users who manage cases for those identified to be isolated or quarantined for COVID-19 compliance What: 30 min. live session, then 15-20 min. recording posted to Help site	Health Educator Role Purpose: to deepen learning via targeted, guided support for users who are training others on COVID-19 processes What: 30 min. live session, then 15-20 min. recording posted to Help site	Leadership Role Purpose: to deepen learning via targeted, guided support for leaders on Mobile/Portal and Dashboard functionality What: 30 min. live session, then 15-20 min. recording posted to Help site	N/A

If you have specific questions about the training and learning guide, please reach out to: schoolhealthmanagement@frontlineed.com.