



Welcome to your

# Platinum Success Plan

## **Congratulations on your new purchase!**

The sky is the limit with your Success Plan! At RLDatix we are committed to offering our customers the services they need to optimize the use of their software and get the maximum value from their investment with RLDatix.

This reference guide is designed to help you become familiar with all the exciting benefits associated with your Success Plan.

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# Overview

## What's included in your Platinum Success Plan?

Your Success Plan gives you everything you need to make sure you're getting the most out of your RLDatix investment. Take advantage of the personalized services and benefits listed above to utilize the full potential of your system.

	*Signature	Silver	Gold	Platinum
<b>Optimization Services</b>		●	●	●
Access to a dedicated Success Manager (SM)		●	●	●
Remote hours for hands-on configuration assistance, training, consultation, special projects and more		50 hours	100 hours	250 hours
Annual on-site visit by your Success Manager or an RLDatix Executive				●
<b>Software Support</b>	●	●	●	●
Access to product updates	●	●	●	●
Update services including new version installation and training			●	●
Technical services such as server migrations for on premise installations				●
HUB access	●	●	●	●
Support SLA guarantees				●
<b>User Group Conference (RLDatix Palooza)</b>	Fees apply	Fees apply	1 pass	3 passes or 1 pass including travel costs
Discount on additional passes			10%	10%
<b>Additional Benefits</b>			●	●
Discount on additional services			5%	10%
Preferential access to product advisory activities				●






*The Success Plan term will align with the renewal period for annual support, and auto-renew on an annual basis. Either party may, by written notice at least ninety (90) days prior to the expiration of the current term, elect to change or discontinue the plan.*

*\*The Signature Success Plan is available to every customer through Annual Support and Maintenance*

# Optimization Services

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One of the core features of Success Plans is our optimization services, offered by our Customer Success team. Your dedicated Success Manager (SM) will help maintain your system, configure your forms, reports, alerts and offer advice on how to expand use of the system to meet new and evolving best practices. This service offers your organization many benefits:

-  **Worry-free system configuration and maintenance** provided by your dedicated Success Manager. Take advantage of this service during your implementation, after go-live or during a transition period to help build competency with your software.
-  **More free time** to help you focus on what really matters. We understand you're dedicated to improving patient safety. Let us support your patient safety initiatives by making the administration of a software system easier.
-  **Optimize the use of the system** by having a system expert regularly monitor the system, providing recommendations to optimize the software, and working with you to stay on top of the latest trends, features, and functionality. Your dedicated Success Manager can make recommendations to best utilize the system and provide the assistance needed to achieve your organization's goals.
-  **Ensure against downtime and costs associated with staff turnover** with the reassurance that you have continuous service from RLDatix's expert team regardless of staff availability or turnover at your organization. Our team of experts can also help with saving money on hiring, training and special system administration requests which are usually incurred during staff turnover.
-  **Complete special projects** with immediate assistance from RLDatix experts who can complete the work without adding extra responsibilities to your already busy resources.

## Optimization Services

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**Get the most out of your hours.** The remote hours included in your Success Plan can be applied towards a variety of services, including but not limited to:

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### Software Update Services

Have the RLDatix team perform an update instead of doing your own using the self-updater. To help you transition smoothly to a new software version, our technical support experts will update the software for your organization in a test, training and production environment on behalf of your IT Department. Your Success Manager will ensure you are fully oriented to the new features and functionalities, and that everything is configured and ready to roll out.

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### Health Check

A Health Check ensures that the system is fully functional for end-users, and that your organization is optimizing the system to its full potential. Your Success Manager will conduct a comprehensive analysis of specific criteria and best practices to determine where your organization is excelling and where improvements or changes could be made to achieve better results. Following the analysis, the organization is provided with a written Health Check service report summarizing the interviews, recommendations and action plan.

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### Training

Whether you need annual refresher training, help on-boarding new administrators or learning about new features related to updates, optimization services have you covered.

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### Have us join your table

Platinum Success Plan customers can choose to allocate hours to host their Success Manager onsite for consultation and training OR to have a member of RLDatix's executive team visit your organization to meet with your patient safety and patient experience leadership team(s) to discuss strategic priorities to maximize your investment and explore ways to enhance our partnership\*\*.

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Your Success Manager will design a plan suited to your specific needs. For more details on the scope of work included within the optimization services, please review the Statement of Work.

Any unused remote hours will expire at the end of the service term. Your Success Manager will ensure that you are kept informed of your hours so that you always know how many have been used. If all hours have been used before the end of the service term, the option exists to purchase additional hours, in 50 hour blocks, at the then published hourly rate. Additional hours must be used during the service term in which they are purchased.

\*\* Time deducted from remote hours. Expenses for the onsite visit are extra.

# HUB

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**Learn from your peers.** HUB is your space to interact, connect and learn with RLDatix and its community members. This online platform is your one-stop shop for all interactions with RLDatix and its advocates.

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## Community

Ask questions, share ideas for product improvements or ideas to enhance your experience with RLDatix. Join groups to improve your workflow or see where you can find us next (maybe visiting a city near you!). The goal of Community is to connect you with your peers. If no one has answered your question in ~24 hours, someone at RLDatix will step in to help!

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## Knowledge Base

A place for you to access information from our experts to help with troubleshooting and transfer of knowledge.

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## Training

A place where you can access a variety of training resources to help you master your software and learn about best practices.

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## My Cases

A place where system administrators can submit optimization requests to their designated Success Manager, or submit cases to our support teams.

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## Rewards

With our loyalty program, customers can earn points by contributing in community on HUB, being a reference, providing feedback and much more. Customers can redeem their earned points for complimentary user group passes, services or software credits - to name a few.

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Not sure where or how to get started on HUB? Don't worry, we are here to help! Once you are all set, we will share some participation guidelines as well as tips for engaging in the community for all first-time users.

For more information on HUB, please visit the RLDatix website at [www.rldatix.com/HUB](http://www.rldatix.com/HUB).

# User Group Conference (RLDatix Palooza)

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## Engage with us.

RLDatix's annual user group conference is three insightful days of in-depth learning sessions, networking opportunities and fun surprises you won't want to miss. From engaging frontline staff in reporting to effectively using data to drive change - our user group conference has got something for everyone!

Our attendees also have an opportunity to expand their software expertise with practical, hands-on-training led by RLDatix product experts, and opportunities to expand their knowledge by sitting in on client success stories and amazing industry speakers. This conference is your one-stop shop to learn all the latest tips and tricks you need to leverage the tools we offer. And, as an added bonus, our evening events allow you to experience the host city at it's best.

With the purchase of your Platinum Success Plan, your organization is entitled to three user group passes, or one user group pass with travel costs and 10% off additional passes.

For more information on user group please visit: [www.rldatix.com/palooza](http://www.rldatix.com/palooza)

For further clarification on complementary/discounted user group passes please reach out to RLDatix's marketing department at [marketing@rldatix.com](mailto:marketing@rldatix.com)

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**TERMS AND CONDITIONS:** The Platinum Success Plan includes up to three (3) free registration passes toward the RLDatix User Group Conference taking place during the Client's annual Success Plan term. The passes can be redeemed once during the annual Success Plan term. The reward is redeemable for the full program registration, and it cannot be split in any way. The reward does not include pre or post conference training. RLDatix will provide any additional items included as part of regular RLDatix User Group Conference registration in line with what is offered for the year of redemption. Any costs outside of the registration fee, including but not limited to flights, taxis, hotels, non-RLDatix User Group Conference provided meals, entertainment or any other fees are the sole responsibility of the Client. All free passes must be redeemed a minimum of four weeks prior to the conference date.

With a Platinum Success Plan, the Client can alternatively choose to receive one (1) free registration pass plus travel costs up to \$2500. Eligible travel costs include a flight for one person to the hosting city of the RLDatix User Group Conference and hotel stay for one person for the nights during the term of the conference. Any other costs, including but not limited to taxis, non-RLDatix User Group Conference provided meals, entertainment, transportation or any other fees are the sole responsibility of the Client. The Client is responsible for booking his/her own travel and accommodation. The Client is responsible for submitting all receipts to be reimbursed by RLDatix.

Discounts for extra RLDatix User Group Conference passes must be used toward the conference taking place during the Client's annual Success plan term. The discount on additional passes is not applicable to Early Bird pricing, Group discount pricing or guest passes, and can only be applied to the full conference registration rate.

## Additional Benefits

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### **Treat yourself**

Take advantage of the 10% discount offered and apply it towards any services offered by RLDatix\*. Speak with your Success Manager for more information.

*\*This discount cannot be applied to services associated with the purchase of software, licensing, annual support, Success Plans and/or additional remote hours.*

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### **Be at the table with RLDatix**

We weren't joking when we said the sky is the limit with your Success Plan! We love to hear from you so, make your voice heard and take advantage of opportunities offered by RLDatix. Be invited to participate in various product advisory initiatives offered by the RLDatix from time to time, including focus groups, research studies and round table discussions (excludes travel expenses).

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### **Your SLA guarantee**

If RLDatix fails to meet the service level agreement as outlined in the RLDatix Software Support & Maintenance Guide, a Platinum Success Plan customer can notify RLDatix and, if validated, service level credits will be applied as a discount against the next year's annual fees or otherwise refunded. Restrictions apply. For more information please see your Terms of Use Agreement.



# Contact

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## We've got you covered!

We are truly excited about your decision to become a Success Plan customer. We look forward to working with you and helping you reach new heights with your software.

### Need some help?

Reach us through any of the portals below to get answers to any questions you may have about the Success Plans:



Ask us your questions in HUB  
[hub.rldatix.com](https://hub.rldatix.com)



Visit our website at  
[www.rldatix.com](https://www.rldatix.com)



Contact your  
Success Manager