EMERGENCY REPORTING UPGRADE JOURNEY

We've mapped out your Upgrade journey to ESO below, from the initial discovery conversation with your account executive to your complete migration and ongoing support. We estimate you'll be able to access data in your new system 120 days after you sign the contract.

Plan →

Build →

Test & Train →

Go Live

1. Discovery

In the initial phase, our goal is to ensure we understand your data and organizational needs. This step includes a discovery call with your key team members to talk about your needs, data, and pricing structure. We'll follow up with a contract that captures the details of the discovery call.

The contract is signed.
Once your contract is signed, you'll receive an email from our team to set up your onboarding kick-off call.

ESO environment is created.
Based on Discovery, we'll put together the first version of your ESO environment. We'll continue to configure[i] with your team as the onboarding process continues.

2. Onboarding Kick-off Call

We will review and align on the customer and product-specific onboarding process and timeline requirements for Admins and End Users. We'll discuss how we'll partner with Admins to populate your agency's ESO environment, focusing first on migrating agency and personnel data from your current environment into the ESO platform.

To be successful, we ask that you:
- Review Agency demographics, Personnel, Units, Stations, Zones, EMS Status, and Facilities fields
- Archive any data elements your agency DOES NOT want migrated
- Add missing emails for any Personnel your agency DOES want migrated

3. Data Migration Begins

As part of the ESO family, you'll have access to our automated data transfer engine, which will speed up the data process, decrease the work on your teams, and allow you to validate the accuracy of information along the way. We will partner closely with your agency to populate the ESO environment with pertinent data to meet your workflow and reporting requirements.

This includes the following steps:
1. Review and update Emergency Reporting environment.
2. Import data into the ESO platform.
3. Validate data in the ESO platform.
4. Update outstanding data requirements (as needed) in the ESO platform.
5. Once your agency is live for incident documentation, we will begin transferring historical data so you can access current and historical records in one RMS system.

A few modules will require additional data migration processes. If your agency is using those modules, we'll discuss migration process and timing during the onboarding kick-off call.

4. Admin Training and Configuration

For every product purchased, your Admins have access to configuration, user, and additional trainings to help support your products – all available through ESO On-Demand Learning.

During this time, the ESO team continues configuring and validating your ESO environment to your department's needs, while local Admins work on agency-specific configuration.

Milestone: Local Admins complete agency-specific configuration within your ESO environment after admin training is complete. You'll want this close-to-final, so your End Users receive relevant training to their real-life setup.

5. End-User Training

Admins should ensure all providers have access to the ESO environment. Once they're in, End Users should take advantage of our On-Demand Training while we (the Admin team and ESO!) confirm product readiness.
Your organization will be set up for success with training on your preferred modules just in time to make the official upgrade to ESO.

6. Final Adjustments and Utilization

While End Users complete training, agency Admins will make final adjustments to the configuration and sign off on workflow-specific checklists. We'll coordinate with you and your state to ensure compliance with local reporting requirements. Then, you're ready to begin using your new ESO product(s) while we continue planning and optimizing any additional needs.

Milestone: You're Live!
We recommend your team completes additional training in Reporting Modules (like Insights and Analytics).

7. Ongoing Success

Customer Support and Care
Our support is never done. We'll introduce you to additional ESO support teams as we continue to work with you to transfer historical records from Emergency Reporting to ESO. We're available to answer questions, solve any transition challenges, and connect your agency to ongoing training and learning opportunities.

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i. **Configure:** We'll set agency-specific features like Cardiac Monitor, Mobile App, Billing Interface, and CAD based on integrations and modules in scope.