PSTRAX SUCCESS GUIDE:
PPE MODULE

These checklists are designed to help you implement PSTrax successfully, from initial setup to full deployment. Remember that we're here every step of the way, so feel free to reach out with any questions or adjustments.

» PHASE I: Review & Fine-Tune the System

- **Complete admin training**. Go to **Help** > **Admin Training** > **PPE Module Training** to explore admin training tutorials. Or sign up for one of our deep-dive webinars here.

- **Verify PPE Gear List**. Go to **PPE > Gear List** and ensure all equipment (jackets, pants, etc.) is in the system. You can edit, add, or remove gear (and gear types) as needed. Learn more.

- **Set up alert recipients**. Alert recipients can be set by gear type to ensure that appropriate users receive notifications when issues arise. Go to **Settings > PPE > Alert Recipients** to set up. Learn more.

- **Log a PPE inspection**. Click **# PPE items due** or **As-Needed Check** from the Station Home screen. Log tasks and set fake alerts on one or more pieces of gear to get used to the workflow. Note any adjustments you'd like to make. Learn more.

- **Update and close an alert**. After setting an alert, add comments, change gear status, log a repair event, and more from the Station Home screen (click the **PPE** tab on the **ALERTS** panel), or from **PPE > Alerts > Open Alerts > Actions**. Learn more.

- **View & adjust events** – Go to **Settings > PPE > Events** to edit the default PPE inspections (adapted from NFPA 1851). You can enable a check-all function, set admin-only events, modify tasks, and more. Learn more.

- **Set up intervals and due dates**. Go to **Settings > PPE > Event Intervals** to set up the inspection schedule for your gear. Then set due dates by selecting the gear on **PPE > Gear List** and clicking **Batch > Schedule Event**. Learn more.

- **Set up status report recipients.** The PPE status report is a monthly email that summarizes upcoming inspections and activities. Go to **Settings > Personnel > User List > Edit > PPE Status Email** to add recipients. Learn more.

- **Adjust system settings**. The following options can be adjusted by our team to match your preferences. Please let us know if you'd like to make changes.
  - **Status email time** – This report is sent once a month on the 15th, but can be adjusted to send monthly on the 1st or weekly each Monday. Learn more.

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- o **General alerts** – General alerts are not tied to a specific piece of gear and are seen by everyone. By default, PPE Users can't set general alerts, but that can be changed. Learn more.
- o **Add custom alert fields** – Up to three custom fields can be added to all PPE alerts, so you can gather more information for reporting or operational needs. Learn more.
- o **PPE restricted to user's gear only** – By default, PPE Users can only log inspections on their own gear, but can be adjusted to allow users to check off each other's gear. Learn more.
- o **Hide "Log All Gear" from scheduled checks** – Users can log all due gear checks from one form. If disabled, users must log each inspection individually. Learn more.
- o **Weekly email notification with overdue tasks** – Send an email to all users with overdue PPE checks reminding them to complete their inspections. Learn more.
- **Review best practices.** Don't reinvent the wheel! Check out our Knowledge Base to see how other organizations are using PSTrax to track their PPE checks & inventories. Learn more.

» PHASE II: Roll-Out to Your Crews

- **Verify user access.** Go to your **Settings > Personnel > User List** to make sure all users who should have access to the PPE module are listed in PSTrax, and have the correct permission levels.
- **Send login information to users.** You should have received username and password information from your Build Manager, but you can access it again from the **User List**. Pass this along to each user when you're ready to have them access the system.
- **Provide training materials to users.** Once they log into PSTrax, have users go through a step-by-step training checklist to learn the module in detail (**Help** > **User Training** > **PPE User**). You can also post our PPE User Training Videos into your training platform ahead of time.
- **Have users verify their gear information.** Guide users to **PPE > Gear List** to ensure that all of the gear assigned to them has been loaded and the information is accurate. Any adjustments should be sent to a PPE Admin to correct. Some organizations set up a Gear Verification event in PSTrax to accomplish this. Here's how it works.
- **Make adjustments.** After identifying adjustments, make the corrections yourself (if you feel comfortable), or collaborate with your Build Manager to facilitate the necessary changes. Note that you may require multiple rounds of adjustments as you get input from more users.

» PHASE III: Go-Live with PSTrax

- **Pick a day to go-live.** It's helpful if you let us know what date you choose at least a few days in advance so we can prep on our end. Note that you **DO NOT** have to go live with all modules at the same time. Some agencies prefer to roll-out the modules in phases.

- **Clear out test data & reset schedules.** We'll help you delete your test logs and alerts, if applicable. None of the settings changes you've made (checklist adjustments, gear edits, etc.) will be affected. Your schedules can be reset to start on or after your go-live date.