

## Before the Install:

- Print install checklist
- Place a call to the end user as a reminder for the appointment time and date. If no answer, leave a message with the appointment details.
- Confirm laptop is charged and ready for use

## Upon Arrival at the Appointment:

- Confirm intended registered user is present and available to complete the installation and registration
- Gather installation equipment
- Internet Service Provider (ISP)
  - Modem and/or router: make and model
    - Service type (Cable, DSL, etc.)
    - SSID (Wi-Fi username):
    - Network key (Wi-Fi password)
  - TelCo provider
- Enter collected information into the Field Nation work order
- Determine best install location
  - Verify the phone jack is functional

## Installing the Phone:

- Open blue envelope labeled "Installation Accessory Kit"
- Locate the "Quick Start Guide." Use the guide to complete the following steps:
  - Unpack and remove all protective films
  - Connect the handset
  - Attach the stand
  - Plug in the AC adapter (power cord)
  - Start Connection Wizard

## □ Network

- Ethernet: Connect provided ethernet cable to the modem, then plug the ethernet cord into the ClearCaptions phone
- Wi-Fi: Log in to the Wi-Fi network using the collected login information

## □ Software

- Install any software updates that may be available:
  - From the home screen select Settings and then Software Update to confirm

## □ Phone Line

- Connect provided phone line to the phone jack then plug the phone line into the ClearCaptions phone

## □ Registration

- Log in using the email and password provided in the Field Nation work order.
- Use the registered user's DOB and last four (4) of SSN
- Have the registered user press "Accept" to accept the terms and conditions  
**IMPORTANT!** Only the registered user may press accept
- Press "Accept" or "Decline" CPNI

## Answering Machine:

- Follow these steps if the customer wants to use the ClearCaptions answering machine. If not proceed to "Welcome Call."
  - Adjust the existing answering services
  - Turn off or adjust ring settings of in-home answering machines
  - Turn off or adjust ring settings of TelCo voicemail services (use the "Voicemail Access Guide" to complete this process. This may require the provider to contact the TelCo to adjust the service).
    - If wait times are greater than 15 minutes email [support@clearcaptions.com](mailto:support@clearcaptions.com)
      - Include Customer Information (name, address, phone)
      - Request voicemail adjustment for customer
      - Set expectation that we will contact them within 72 hours to call their TelCo with them to adjust the voicemail system
  - Inform the customer that the answering machine setup cannot proceed until this step is complete
- Turn on the answering machine on the ClearCaptions phone:
  - Leave settings at default levels (number of rings, default message)
  - Call the customer from your Field Nation listed phone # and allow it to ring through and leave a message
  - Train customer on identifying, retrieving and playing back message
  - Verify message playback is captioned

## Welcome Call:

- Call 866-868-8695 Option 3 with the customer for a welcome call:
  - An agent will guide the customer through the welcome call, as well as completion of the Medical Release Form (MRF) located in the Blue envelope
  - Ask the registered user if their hearing loss was diagnosed through Kaiser, Veterans Affairs, or somewhere else. Provide the appropriate Medical Release Form:
    - Kaiser = Green
    - Veteran's Affairs = Red
    - Other (standard) = Blue

## Final Steps:

- Check customer equipment (computer, modem/router, additional home phones, etc.) to confirm they are still operational
- Clean up installation area and place additional cords and accessories back into the box
- If the Blue phone installation is unsuccessful for any reason or any customer equipment is no longer operational contact Support at 866-868-8695 Option 1 for further instruction prior to leaving the work site
- Insert the completed Medical Release Form into the included pre-paid envelope and instruct the customer to deposit the envelope into the nearest mail box.