



AURORA[®]

User Guide

Ora Release 1

May 18, 2020

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Revision History

| Revision # | Revised By | Revision Date | Summary of Changes |
|------------|--|-------------------|--|
| 1.1 | Nahid Lalji, Kristina Tan | December 22, 2019 | First draft of document for R1A |
| 1.2 | David Campbell | December 29, 2019 | Detailed edit of document |
| 1.3 | Nahid Lalji, Kristina Tan, Thiv Paramsothy | March 2, 2020 | Updates based on recent releases |
| 1.4 | Nicole Calzavara, Igor Tomchevski | March 15, 2020 | |
| 1.5 | Nahid Lalji, Kristina Tan, Thiv Paramsothy | May 5, 2020 | Content added for: Questionnaire Manager, Create Email and SMS notification templates. Updates for: - New Patient modal and New Provider modal. |
| 1.6 | Nahid Lalji, Kristina Tan, Thiv Paramsothy | May 18, 2020 | Added content for: - Questionnaires - Availability |

1 System Requirements

The platform is not compatible with every device, operating system and browser out there.

Our app works on both laptops/desktops and mobile devices. The following have been tested and known to work with our app:

Laptops / Desktops

- Windows PCs running Windows 7+ with Google Chrome or Mozilla Firefox browser
- Apple Macintosh computers running macOS v10.11+ with Google Chrome or Mozilla Firefox

Mobile Devices

Android devices (Android 8 – Android 9)

- Samsung Galaxy S7, S8, S9 with Google Chrome and Mozilla Firefox
- Samsung Galaxy S5 neo with Samsung browser
- Google Pixel with Google Chrome

Note: Due to the large range of Android devices, it is not possible for our team to test all devices. Please note that devices that are not listed above may not be compatible with the app.

Apple mobile devices (iOS 11+)

- Apple iPhones with Safari

2 Patient Self-Service

2.1 Creating a New Patient

Users will direct new patients to the Patient Sign Up to book their appointment.

Let's get your appointment booked

First time with us? 1

Been with us before?

Please enter your Date of Birth

Now, enter a valid Email or Health Card

or

1. Click **“Start as a New Patient”**.

2.1.1 Patient Demographics

Tell us more about you 2

First Name * Last Name * Date of Birth * Gender

Email Address * Address * Mobile Number

Health Card Number Version Code Province (of Healthcard) Veteran ID

3

2. Fill out all relevant **patient information** and ensure that all mandatory fields are complete.

Note: All mandatory fields are indicated by a **“*”** beside the field name

3. Click **“Next”** to go to the next section.

2.1.2 Scheduling an appointment

Choose a location

| | | |
|--|---|--------|
| Virtual | | Select |
| Canadian Cannabis Clinics - Etobicoke | 2405 Lake Shore Blvd W Suite 302, Etobicoke, ON M8V 1C6 | Select |
| Canadian Cannabis Clinics - Toronto (Danforth) | 121 Danforth Ave, Toronto, ON M4K 1N2, Canada | Select |
| Canadian Cannabis Clinics - Markham | Unit 1-B, 227 Main St N, Markham, ON L3P 1Y6, Canada | Select |
| Canadian Cannabis Clinics - Toronto (Midtown) | Unit 1008, 2200 Yonge St, Toronto, ON M4S 2C6, Canada | Select |
| Aurora HQ | 54 Fraser Ave, Toronto, ON M6K 1Y6, Canada | Select |

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4. Select a **clinic location** where appointment will take place.

How can we help you?

Reason for your visit *

Relevant previous and existing conditions

Counselling For all patients. Assessment with cannabis counsellor to ask questions and get advice. Select

First Assessment For new patient. Assessment with healthcare practitioner and cannabis counsellor. Select

Back

5. Fill in the **visit reason**.
6. Fill in the **previous and existing conditions** as applicable.
7. Select the relevant **Healthcare Service**.

Choose an appointment time

Timezone
America/Toronto

Preferred Date *

Sat 7th Sun 8th Mon 9th Tuesday 10th, December 2019 Wed 11th Thu 12th Fri 13th

7:30 AM 9:30 AM 12:50 PM

8:10 AM 10:10 AM 2:50 PM

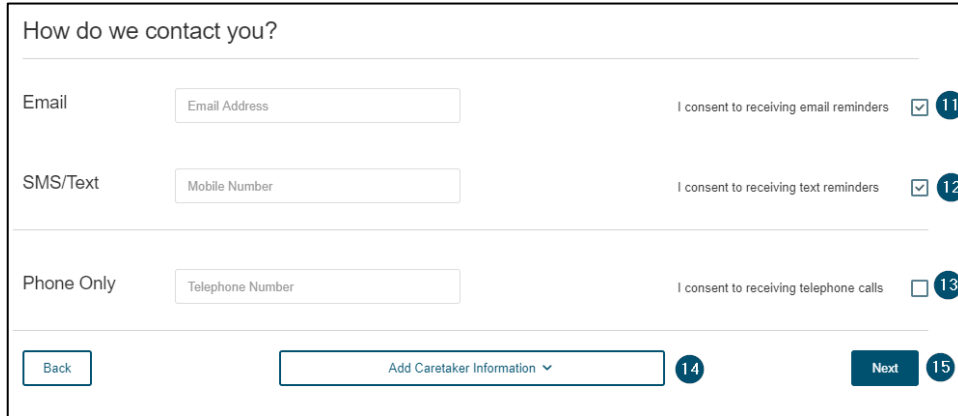
8:50 AM 12:10 PM

Note: Healthcare Services can vary between clinic locations.

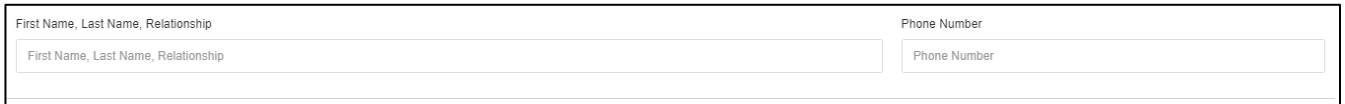
8. Select the appropriate **time zone** for the patient’s visit.
9. Select a **date**.
10. Select an available **time slot**.

2.1.3 Patient Contact Information

Patients can consent to be contacted by either email and/or text, or phone only.



11. Fill in the **email address** and **consent to receiving email reminders** as applicable.
12. Fill in the **mobile number** and **consent to receiving text reminders** as applicable.
13. Fill in the **telephone number** and **consent to receiving telephone calls only** as applicable.
14. Click “**Add Caretaker Information**” to add a caretaker’s contact information to as seen below.



15. Click “**Next**” to go to the next section.

16. Click “Choose File” and upload an **attachment** as applicable (max file size is 20 MB) or email all relevant documents to hello@cannabisclinics.ca.
17. Search for the patient’s **doctor’s profile** by their last name.
18. If the **doctor’s profile** cannot be found, click “Add Doctor” and the following form will appear and can be saved.

19. Use the mouse to **electronically sign** to consent to the outlined terms.
20. Click “Clear Signature” to re-do the electronic signature.
21. Click “Finish” to submit the form.

2.2 Existing Patient

Patients will select whether they are a new or returning patient on the Patient Sign Up form to book their appointment. Hi

Let's get your appointment booked

First time with us? Start as a New Patient

Been with us before?

Please enter your Date of Birth 1

Now, enter a valid Email or Health Card 2

or 3

Login as an Existing Patient

1. Enter **date of birth**.
2. Enter either the **email address** or **health card** information.
3. Click “Login as an Existing Patient” to go to the next page.

2.2.1 Scheduling an appointment

Choose a location

| | | |
|--|---|-----------------------|
| Virtual | | Select |
| Canadian Cannabis Clinics - Etobicoke | 2405 Lake Shore Blvd W Suite 302, Etobicoke, ON M8V 1C6 | Select |
| Canadian Cannabis Clinics - Toronto (Danforth) | 121 Danforth Ave, Toronto, ON M4K 1N2, Canada | Select |
| Canadian Cannabis Clinics - Markham | Unit 1-B, 227 Main St N, Markham, ON L3P 1Y6, Canada | Select 4 |
| Canadian Cannabis Clinics - Toronto (Midtown) | Unit 1008, 2200 Yonge St, Toronto, ON M4S 2C6, Canada | Select |
| Aurora HQ | 54 Fraser Ave, Toronto, ON M6K 1Y6, Canada | Select |

Back

4. Select a **clinic location** where appointment will take place.

How can we help you?

Reason for your visit *

Relevant previous and existing conditions

Counselling For all patients. Assessment with cannabis counsellor to ask questions and get advice. **7**

First Assessment For new patient. Assessment with healthcare practitioner and cannabis counsellor.

5. Fill in the **visit reason**.
6. Fill in the **previous and existing conditions** as applicable.
7. Select the relevant **Healthcare Service**.

Note: Healthcare Services can vary between clinic locations.

Choose an appointment time

Timezone
America/Toronto **8**

Preferred Date **9**

Sun 15th Mon 16th Tue 17th Wed 18th Thu 19th **Friday 20th, December 2019** Sat 21st Sun 22nd Mon 23rd Tue 24th

7:30 AM 10:10 AM 12:50 PM

7:50 AM 10:30 AM 1:10 PM

8:10 AM **10:50 AM** 1:30 PM **10**

8:30 AM 11:10 AM 1:50 PM

8:50 AM 11:30 AM 2:10 PM

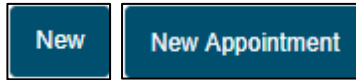
11

8. Select the appropriate **time zone** for the appointment.
9. Select a **date**.
10. Select an available **time slot**.
11. Click “Finish” to schedule the appointment.

3 Scheduling

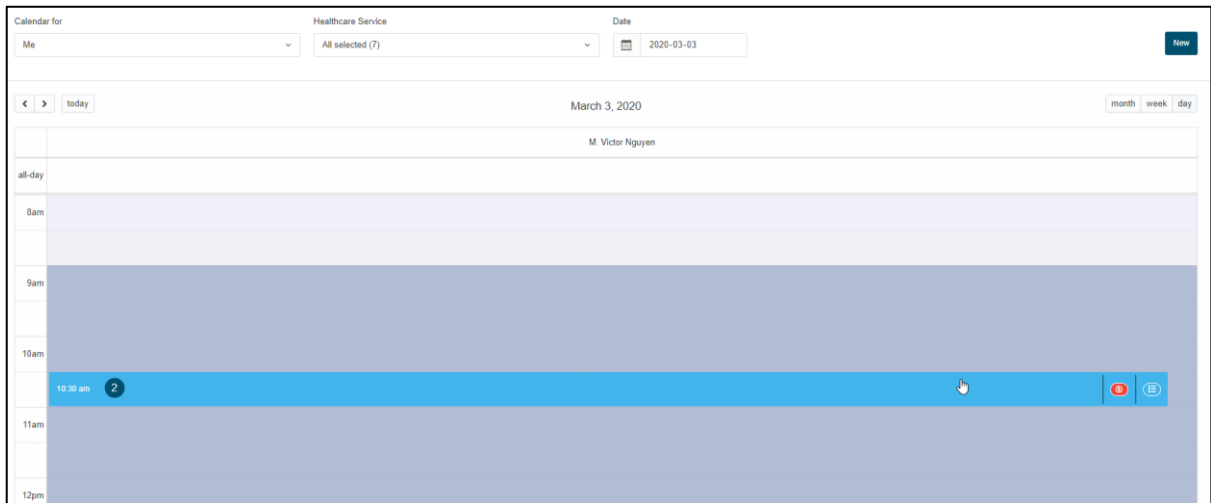
3.1 Scheduling an Appointment

If a patient does not use the [Patient Sign Up](#) form, users can schedule an appointment using **Calendar** or **Appointments**.



1. Click the “New” button on **Calendar** or “New Appointment” on **Appointments**

OR



2. Create the appointment directly on the calendar by clicking-and-dragging the appointment time on the **Calendar**. Once selected, the New Appointment screen will appear.

3. Choose the **patient** who would like an appointment. If the patient does not exist, create a [new patient](#).
4. Choose the **primary provider** who will be conducting the session.
5. If applicable, choose a **secondary provider** who will need to attend the appointment (up to a maximum of two).
6. If applicable, select the **Healthcare Service** related to the appointment.
7. Choose a **location**.

Note: To create a *video conferencing* session, select the “**Virtual**” location. See the [Virtual Care](#) section for more information on how to join a session.

8. Choose a **date and time** to start and end the appointment.

Note: If you created the appointment directly on the calendar, the date and time will be pre-populated to your selected time frame.

9. **Time** can also be adjusted from the Calendar view on the right.
10. If applicable, type the **Reason for visit** related to the appointment.
11. Once the form is completed, click the “**Create Appointment**” button.

3.2 Rescheduling an Appointment

There are two ways to re-schedule an appointment:

- On the Calendar
- On the Appointment Details page of the appointment

3.2.1 Rescheduling from the Calendar

1. On **Calendar**, change the view to “**Week**” or “**Month**”.
2. Find the appointment.

Move an appointment



3. Left-click and drag-and-drop the appointment to another day and/or time.

4. If applicable, change the **Primary Provider** of the appointment.
5. If applicable, change the **Location** of the appointment.
6. If applicable, change the **Healthcare Service** of the appointment.
7. Confirm the **date and time** of the appointment.
8. **Time** can also be adjusted from the Calendar view on the right.
9. Click “**Reschedule Appointment**” to save the changes.

Extend the appointment



10. Hover over the bottom of the appointment and left click and drag down to **extend the time**.

Reschedule Appointment

APPOINTMENT DETAILS

SELECT A TIMESLOT BELOW

Primary Provider *
Me

Location *
Virtual

Healthcare Service *
Self Referral 20

Start date *
2020-03-04

Start time *
12:22 PM

End date *
2020-03-04

End time *
12:42 PM

today March 4, 2020 month week day

M. Victor Nguyen

all-day

8am

9am

10am

11am

Close Reschedule Appointment ✓

11. If applicable, change the **Primary Provider** of the appointment.
12. If applicable, change the **Location** of the appointment.
13. If applicable, change the **Healthcare Service** of the appointment.
14. Confirm the **date and time** of the appointment.
15. **Time** can also be adjusted from the Calendar view on the right.
16. Click "**Reschedule Appointment**" to save the changes.

3.2.2 Rescheduling from Appointment Details

1. Click the “Reschedule” button in the top-left side of the Details page.

2. If applicable, change the **Primary Provider** of the appointment.
3. If applicable, change the **Location** of the appointment.
4. If applicable, change the **Healthcare Service** of the appointment.
5. Confirm the **date and time** of the appointment.
6. **Time** can also be adjusted from the Calendar view on the right.
7. Click “**Reschedule Appointment**” to save the changes.

3.3 Edit an Appointment

Appointment with [redacted]

Patient Profile Encounters Check-In Wizard

Patient [redacted]

Primary provider [redacted]

Healthcare Service Self Referral 15

Appointment Type

Location [redacted]

Start Mar 2, 2020 4:00 PM

End Mar 2, 2020 4:15 PM

Phone Number [redacted]

Referral Status NONE

Status SCHEDULED

Substatus NONE

Patient Confirmation Unconfirmed

Cancel Reschedule Edit Confirm

1. Click the “**Edit**” button in the top-left side of the Details page.

Edit Appointment

Primary Provider * 2

Healthcare Service 3

Timezone applied

Primary Provider

Self Referral 15

America/Toronto (-05:00 EST)

Close Edit Appointment 4

8. If applicable, change the **Primary Provider** of the appointment.
9. If applicable, change the **Healthcare Service** of the appointment.
10. Click “**Edit Appointment**” to save the changes.

3.4 Cancel an Appointment

If a patient can no longer attend their appointment, users will be able to cancel it on their behalf.

1. Click into the **“Appointment Details”** page from either the **Calendar** or **Appointments** page.

Appointment with [redacted]

Patient Profile Encounters Check-In Wizard

Patient [redacted]

Primary provider [redacted]

Healthcare Service Self Referral 15

Appointment Type

Location [redacted]

Start Mar 2, 2020 4:00 PM

End Mar 2, 2020 4:15 PM

Phone Number [redacted]

Referral Status NONE

Status SCHEDULED

Substatus NONE

Patient Confirmation Unconfirmed

Cancel Reschedule Edit Confirm

2. Click the **“Cancel”** button in the top-left side of the Appointment Details page.

Cancel Appointment

Please provide your reason for cancellation (Optional)

Reason for cancellation

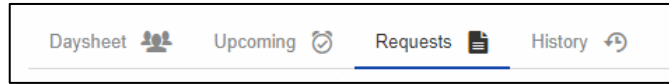
Close Cancel Appointment

3. Type a **“Reason for Cancellation”** as applicable.
4. Click **“Cancel Appointment”** to cancel the appointment.

3.5 Appointment Requests

A healthcare service can be set up with an approval process when an appointment request comes through the [Patient Sign Up](#) form. When a patient selects that service, the request is sent to the provider for approval.

3.5.1 Accepting or Declining Appointment

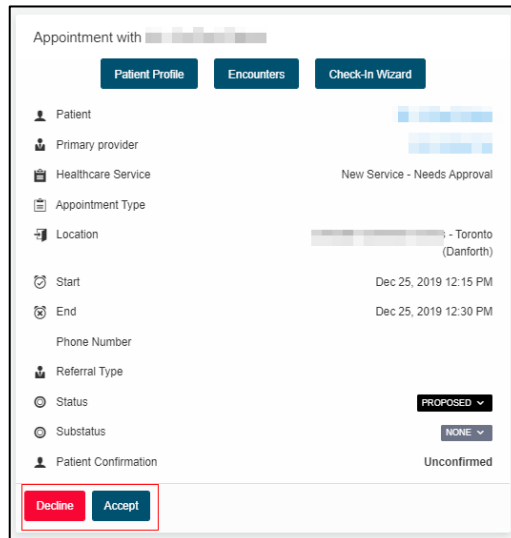


1. Click **Appointments > Requests**.



2. Review the appointment request and select an action:
 - a. **Accept** – Add the appointment to the calendar.
 - b. **Decline** – Reject the appointment.
3. An **SMS or Email notification** will be sent to the patient notifying them the appointment was accepted or declined.

Note: You can also accept or decline the appointment from the appointment details page.



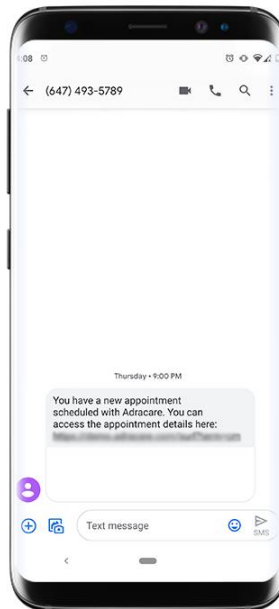
3.6 Appointment Notifications

Based on the notification preference a patient sets in their patient profile, they will receive an email and/or a text message to notify, confirm, and remind them of an upcoming scheduled appointment.

Sample Email



Sample SMS

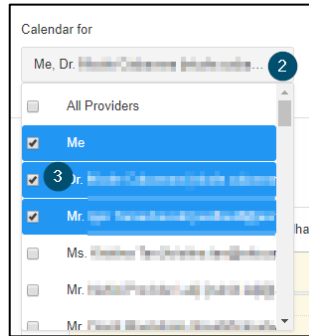


3.7 Viewing other providers appointments

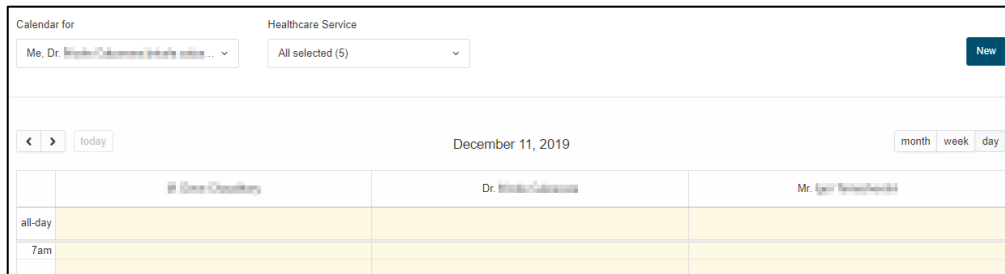
As an administrator, you can view other provider appointments from within “Calendar” and “Appointments”.

3.7.1 Calendar

1. Click “Calendar”.



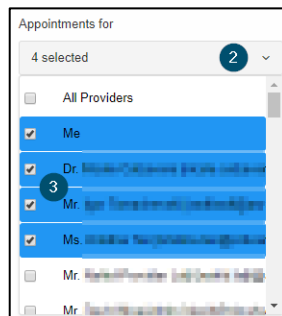
2. Click the “Calendar for” field.
3. Select one or multiple provider name(s).



4. The schedule(s) will load in the calendar.

3.7.2 Appointments

1. Click “Appointments”.



2. Click the “**Appointments for**” field.
3. Select one or multiple **provider name(s)**.

The screenshot shows the 'Daysheet' interface with a navigation bar at the top containing 'Upcoming', 'Requests', and 'History' tabs, and a 'New Appointment' button. Below the navigation bar, there are filter sections for 'Appointments for' (set to '4 selected'), a date picker (set to '2020-04-08'), 'Confirmation' (set to 'Confirmation'), and 'Invoice Status'. A search bar is present with the placeholder 'Type to filter...'. A 'Show:' dropdown is set to '25'. The main content is a table with the following columns: Primary Provider, Date/Time, Patient Name, Age, Phone Number, Location, Healthcare Service, Visit Reason, Appointment Status, Confirmation, Invoice Status, and Actions. Two rows of appointment data are visible. The first row shows an appointment on 04/08/2020 at 12:00 PM with a 'SCHEDULED' status and 'Unconfirmed' confirmation. The second row shows an appointment on 04/08/2020 at 2:30 PM with a 'SCHEDULED' status and 'Unconfirmed' confirmation. The 'Actions' column for each row contains 'Create Invoice' and 'All Appointments' buttons. At the bottom left, it says 'Showing 1 to 2 of 2 entries'.

| Primary Provider | Date/Time | Patient Name | Age | Phone Number | Location | Healthcare Service | Visit Reason | Appointment Status | Confirmation | Invoice Status | Actions |
|------------------|------------------------|--------------|------------|--------------|----------------------|--------------------|--------------|--------------------|--------------|----------------|---------------------------------|
| [Redacted] | 04/08/2020 12:00 PM | [Redacted] | [Redacted] | [Redacted] | Markham (Virtual) | [Redacted] | [Redacted] | SCHEDULED | Unconfirmed | Incomplete | Create Invoice All Appointments |
| [Redacted] | 04/08/2020 2:30 PM | [Redacted] | [Redacted] | [Redacted] | Markham (Virtual) | [Redacted] | test | SCHEDULED | Unconfirmed | Incomplete | Create Invoice All Appointments |

4. The appointment(s) will load in the list.

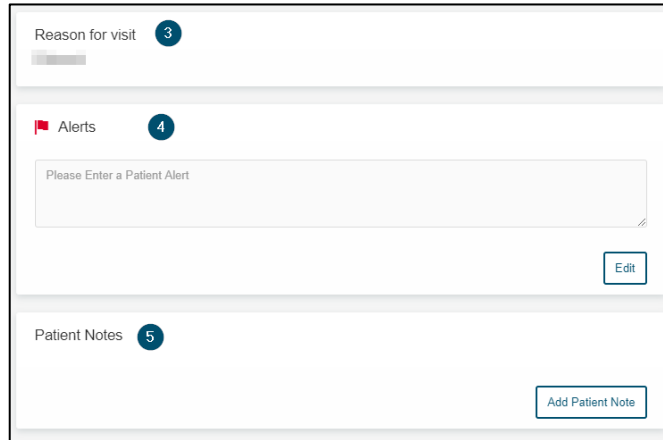
4 Appointments

4.1 Appointment Details

The “**Appointment Details**” page is available for every appointment to provide the important information pertaining to the appointment and the patient. A user can then jump to the patient’s chart and documents from this page after familiarizing themselves with the case. This page is accessible via the **Calendar**, **Appointments**, or **Patient Profile**.

1. An appointment summary panel has all the information about the appointment, including:
 - **Patient** and **Primary Provider** names
 - **Healthcare Service** (e.g., First Assessment, Follow up)
 - **Appointment Type**
 - **Location** of appointment
 - **Date** of appointment and its **start and end time**
 - Patient **phone number**
 - Appointment **Referral status** (if appointment is associated to a referral)
 - Appointment **status**
 - Appointment **substatus**
 - Patient **Confirmation**

2. The [Patient’s Profile](#), [Encounters](#), and the [Check-In Wizard](#) pages are easily assessible using the links above the summary panel.

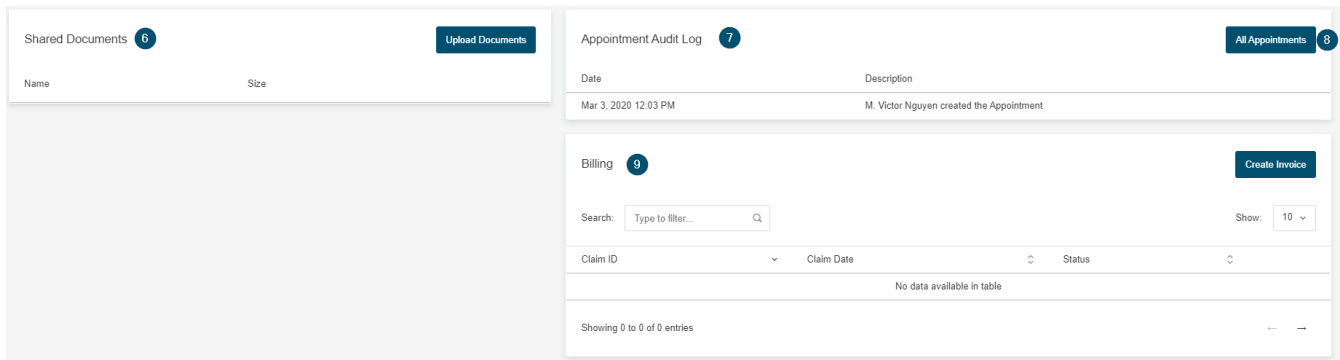


The top right-side panels show:

3. The **reason** entered for the visit.
4. Any patient alerts in the “**Alerts**” section.

Note: Patient Alerts can also be seen in the [Patient’s Profile](#).

5. **Patient Notes** are created by users for the selected appointment.



As you scroll further down:

6. Upload and view **attachment(s)** to this appointment.
7. The **Appointment Audit Log** shows any activity that has happened with the selected appointment (e.g., creation details, updated details).
8. See the **appointment history** of the patient.
9. Billing as well can be completed from the **Appointment Details** page. See the [Billing](#) section to learn how to add or edit an invoice.



10. If your appointment is associated to a referral, you can view the **referral details**.

| Questionnaires | | | | | |
|--|---------------------|-------------|---------------------|----------------------|---|
| Search: <input type="text" value="Type to filter..."/> | | | | | Show: <input type="text" value="25"/> |
| Name | Last Updated | Status | Send Date | Actions | |
| First Assessment Questionnaire | May 6, 2020 8:33 AM | Outstanding | May 6, 2020 8:33 AM | View | Edit Resend |
| Showing 1 to 1 of 1 entries | | | | | |

11. A **Questionnaire status** can be viewed, edited, and resent from the **Appointment Details** page.

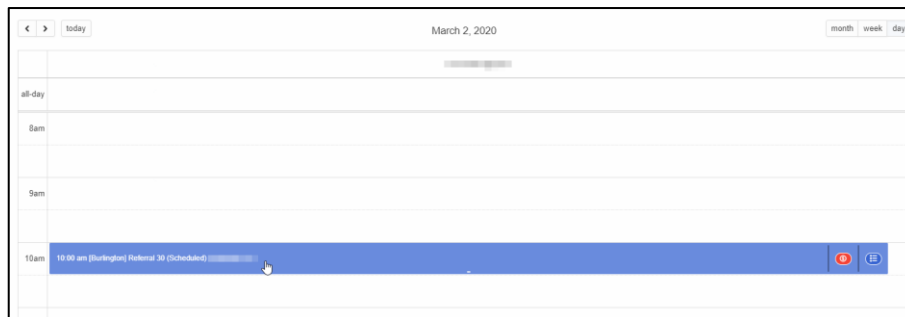
Note:

- See the [Patient Administration](#) section to learn how to view, edit, delete a Questionnaire.
- See the [Encounters](#) section to learn how to import a completed Questionnaire.

4.1.1 Accessing Appointment Details

There are three ways to access a scheduled appointment’s details:

Calendar



1. Click on **Calendar**
2. Click on the appointment

Appointments

The screenshot shows a web interface for appointments. At the top, there are navigation tabs: "Daysheet" (selected), "Upcoming", "Requests", and "History". Below the tabs, it says "Appointments for" followed by a dropdown menu set to "Me" and a date selector set to "2020-03-02". There is a search bar with the placeholder text "Type to filter...". Below this is a table with the following columns: "Date/Time", "Patient Name", "Age", "Phone Number", "Location", and "Attachment". One row is visible with the date "03/02/2020" and time "4:00 PM", a blurred patient name, a blurred age, a blurred phone number, and the location "Markham".

1. Click on **Appointments**
2. Click on the appointment

Patient Profile (CPP)

The screenshot shows a "Patient Profile (CPP)" interface. At the top, it says "Appointments" with a blue plus icon. Below this is a table with the following columns: "Healthcare Service", "Provider", and "Date". There are five rows of data:

| Healthcare Service | Provider | Date |
|--------------------|-----------|------------|
| Referral 30 | [blurred] | 03/03/2020 |
| Referral 30 | [blurred] | 03/03/2020 |
| Referral 30 | [blurred] | 03/03/2020 |
| Referral 30 | [blurred] | 03/03/2020 |
| Referral 10 | [blurred] | 03/03/2020 |

1. Click on the appointment from the **Patient's CPP (CPP > Appointment card)**.

4.2 Daysheet

See an overview of a provider's day by using the Daysheet in the **Appointments** page.

The screenshot shows the 'Daysheet' view in the 'Appointments' section. At the top, there are navigation tabs: 'Daysheet' (highlighted), 'Upcoming', 'Requests', and 'History'. A 'New Appointment' button is on the right. Below the tabs are filter sections: 'Appointments for' (set to 'Me'), 'Confirmation' (set to 'Confirmation'), and 'Invoice Status' (set to 'Invoice Status'). A search bar and a 'Show: 25' dropdown are also present. The main table displays appointment data with columns: Date/Time, Patient Name, Age, Phone Number, Location, Attachment, Healthcare Service, Visit Reason, Appointment Status, Confirmation, Invoice Status, and Actions. Three appointment entries are visible. The 'Actions' column contains 'Create Invoice' and 'All Appointments' buttons. Numbered callouts 1-7 indicate key UI elements.

| Date/Time | Patient Name | Age | Phone Number | Location | Attachment | Healthcare Service | Visit Reason | Appointment Status | Confirmation | Invoice Status | Actions |
|------------------------|--------------|-----|--------------|------------|------------|--------------------|--------------|--------------------|--------------|----------------|----------------------------------|
| 03/02/2020 10:00 AM | [Redacted] | 20 | | Burlington | | Referral 30 | | SCHEDULED | Unconfirmed | Incomplete | Create Invoice, All Appointments |
| 03/02/2020 6:22 PM | [Redacted] | 20 | | Burlington | | | | SCHEDULED | Unconfirmed | Incomplete | Create Invoice, All Appointments |
| 03/02/2020 6:27 PM | [Redacted] | 20 | | Etobicoke | [Eye icon] | Self Referral 30 | | NO SHOW | Unconfirmed | Incomplete | Create Invoice, All Appointments |

Showing 1 to 3 of 3 entries

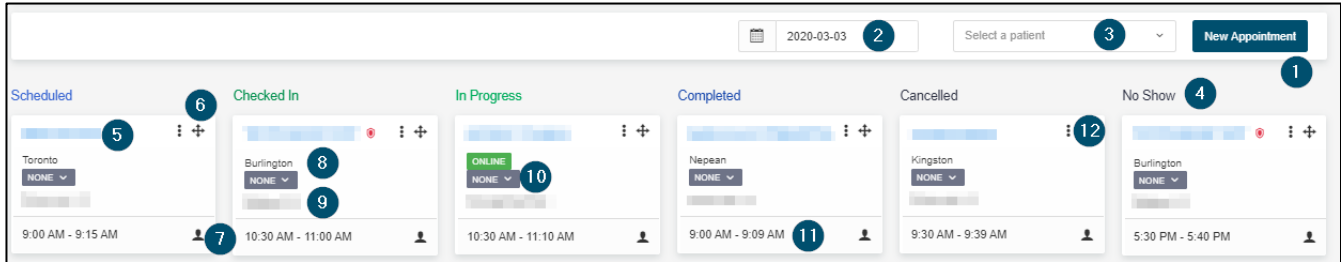
1. If applicable, select a **provider** to view their schedule.
2. Select a **day** to see the schedule for it (the view always defaults to the current day).
3. Select an **appointment confirmation** status to filter the appointments.
4. Select an **Invoice Status** to filter the appointments.
5. Review the overview of **patient's appointment information**.
6. Create an invoice (with ClinicAid).
7. See the patient's **appointment history**.

4.3 Registration

The “**Registration**” page is visual overview of a location’s day. At a glance, a user can:

- Register a scheduled patient.
- Register a walk-in patient.
- View where a registered patient is in their journey.

4.3.1 Registration (Card View)

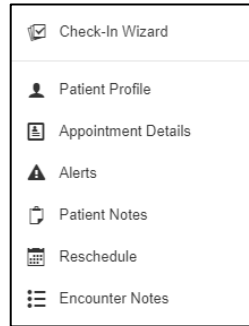


1. Click “**New Appointment**” to register a walk-in patient.
2. Choose a **date** to see the appointment cards (defaults to the current day).
3. If you need to see a certain patient’s appointment, **search** for them (leave it blank to see everyone).
4. There are six **appointment statuses** to which a card can be set:
 - Scheduled
 - Check-In
 - In Progress
 - Completed
 - Cancelled
 - No Show
5. Click the **Patient Name** to open the [Check-In Wizard](#).

Note: A patient will have the following icon beside their Name to easily identify veterans.



6. Click and drag the card under a status to **update the appointment status**.
7. Click and choose a status to **update the appointment status**.
8. See the **location** of the appointment.
9. See the **healthcare service** for the appointment
10. Select a **substatus** to see where the patient is in their appointment. A substatus can only be set when the appointment status is “**In Progress**” or a “**Need to Rebook**” substatus can be selected if the appointment status is “**Scheduled**”
11. See the scheduled start and end time of the appointment.



12. Click for a menu in relation to the patient and/or their appointment:

- **Check-In Wizard:** Open the Check-In Wizard.
- **Patient Profile:** Access the Patient Profile.
- **Appointment Details:** Access the appointment details.
- **Alerts:** Add a patient alert.
- **Patient Notes:** See and add a Patient Note.
- **Reschedule:** Reschedule an appointment.
- **Encounter Notes:** Access the encounter notes.

4.3.2 Check-In Wizard

1. See **basic patient details** on all Check-In Wizard tabs. The bar will be colour-coded depending on the patient's health card status:
 - **Green** – Valid health card
 - **Red** – Invalid health card
 - **Gray** – Unverified health card
2. Fill out the five **tabs** of the Check-in Wizard to register the patient:
 - Pencil – Current editable tab
 - Checkmark – Completed tab
3. Edit **Patient Demographics** as needed and save.
4. Edit **Patient Details** as needed and save.

5. Validate the patient's **health card**.
6. Press Next to go to the "**Appointment Details**" page.

7. Confirm the **location** of where the appointment is being held.
8. Confirm the **health care service**.
9. Confirm the **provider** who will be conducting the appointment.
10. Confirm the **visit reason** of the appointment.
11. Press Next to go to the "**Medications**" page.

12. Type in any **medications** the patient is taking.
13. Save to add to the patient's CPP.
14. View the patient's up-to-date **Medications card from the their CPP**.
15. Press Next to go to the "**Print**" page.

TESTPATIENT666 Date of Birth: 2000-01-01 HC: 2348192378-HC () Appointment Time: 11:52 AM - 12:12 PM Provider: M. Victor Nguyen
TESTPATIENT666

✓ Patient Details ✓ Appointment Details ✓ Medications Print

LABELS PRINT

| Healthcare Service | Copies | Actions |
|--------------------|-----------------------------------|-----------------|
| Self Referral 20 | <input type="text" value="1"/> 16 | Print Labels 17 |

No labels available for printing

Close Save and Close 18

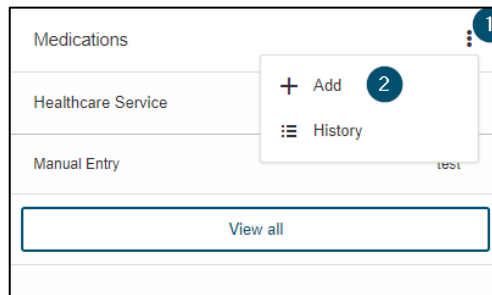
16. Type in the **amount of labels** to print.
17. Print the **labels**.
18. Save and close the **Check-In Wizard**.

4.4 Encounters

Users can document patient appointments by creating an encounter.

4.4.1 Adding to the Cumulative Patient Profile (CPP)

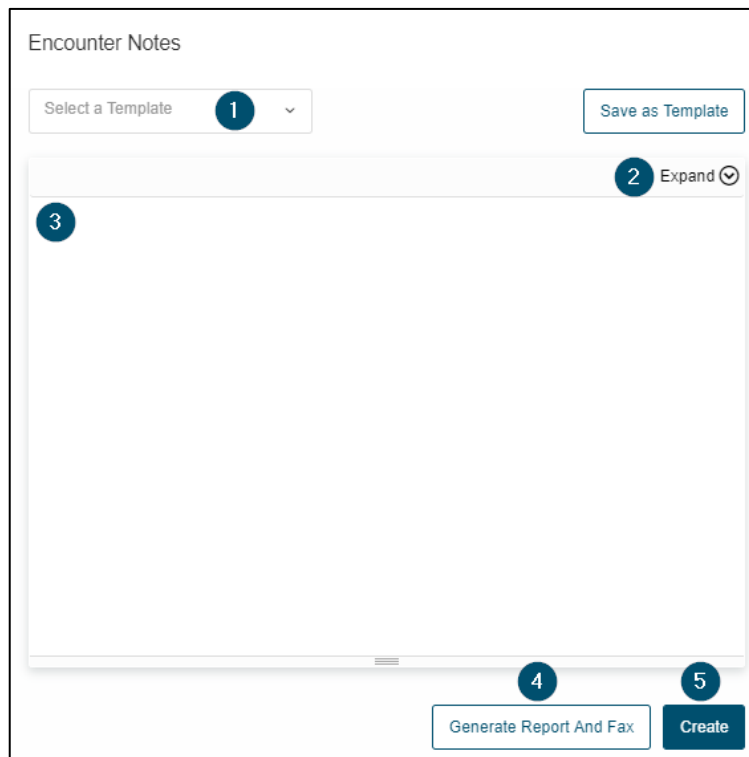
For more information on the CPP, see the [Cumulative Patient Profile \(CPP\)](#) section.



1. Click the menu on the card.
2. Click “Add”.
3. Complete/Upload the information to add to the CPP.

4.4.2 Creating Encounter Notes

On the encounters page you will see the CPP cards displayed on the left and the section to enter encounters on the right.



1. Select an Encounter Template as required.
2. Ability to expand/collapse the Encounter Notes toolbar to allow for more space on the screen.
3. Enter any encounter notes/complete the encounter template in this section.
4. Click **“Generate Report And Fax”** to create a finalized encounter note and fax it to the referring provider.
5. Click **“Create”** to save the encounter note so that it can be edited at a later time.

When clicking **“Generate Report and Fax”** there is the option to verify/edit the recipient or recipient details.

Report Fax Confirmation

testProvider7 testProvider7 6

7

Salutation First Name * Last Name *

testProvider7 testProvider7

Phone Number Fax Number *

Phone Number (905) 855 - 1907

Address

Address

Add Provider Signature to outgoing report?

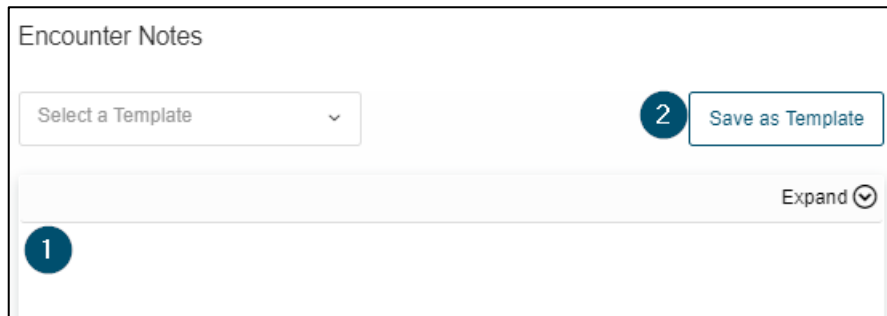
8 9

Cancel Preview Send Report

6. Select a new provider (if applicable)
7. Verify/Edit provider’s details
8. A preview of the report can be viewed by clicking **“Preview”**
9. To fax the report to the provider click **“Send Report”**

Note: Referral Provider information will be auto-populated in the header of the consult report.

4.4.3 Creating an Encounter Note Template



1. Create the template in the text editor.
2. Click “**Save as Template**” to save the template for future use.



3. Enter a name for the template.
4. Click “**Save**” to save the template for future use.

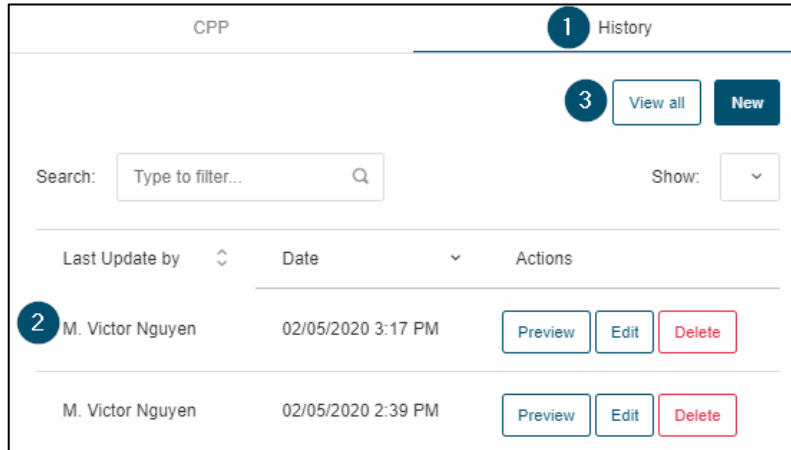
4.4.4 Importing a Completed Questionnaire

Completed questionnaires can be converted to unstructured format and imported into the encounter notes for that patient.

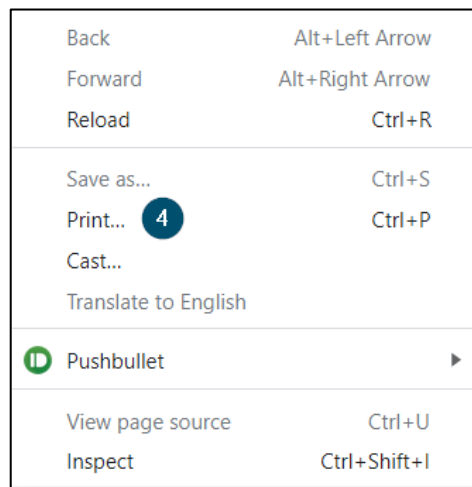
1. In the **Encounters** page for the patient, click on the **Import Questionnaire Response** button.
2. In the modal, click on the dropdown and select the completed questionnaire and click on the questionnaire you want to import.
3. Click on the **Import** button.
4. You will find the unstructured version of the questionnaire in the encounter notes.

4.4.5 View Encounter Note History

While completing an encounter note you can view/edit past encounter notes by viewing the encounter history.



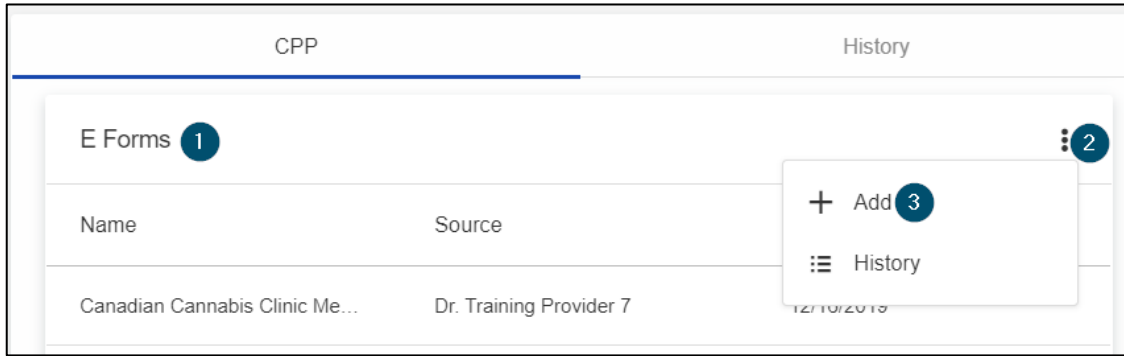
1. Click on the **“History”** tab next to CPP.
2. The list of past encounter notes are displayed. A particular note can be viewed by clicking the **“Preview”** button.
3. All encounter notes can be viewed by clicking the **“View all”** button.



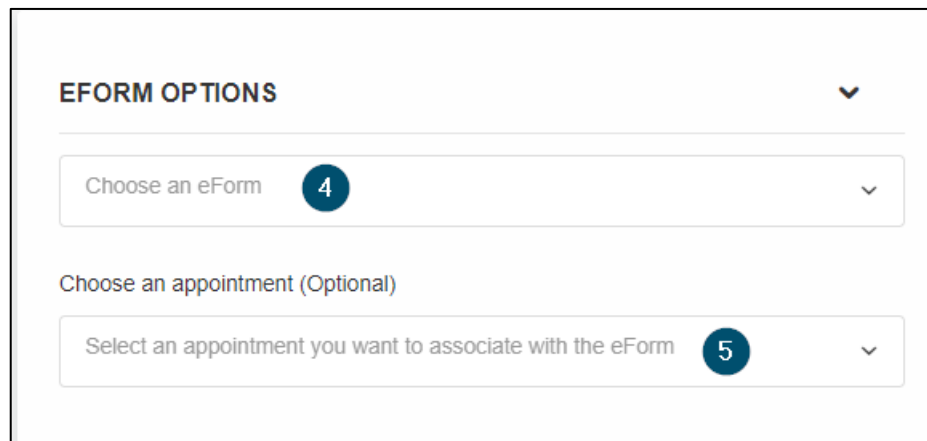
4. To print an encounter note, within the encounter note popup, right click within the note and select **“Print”**.

4.4.6 Prescription Fulfillment

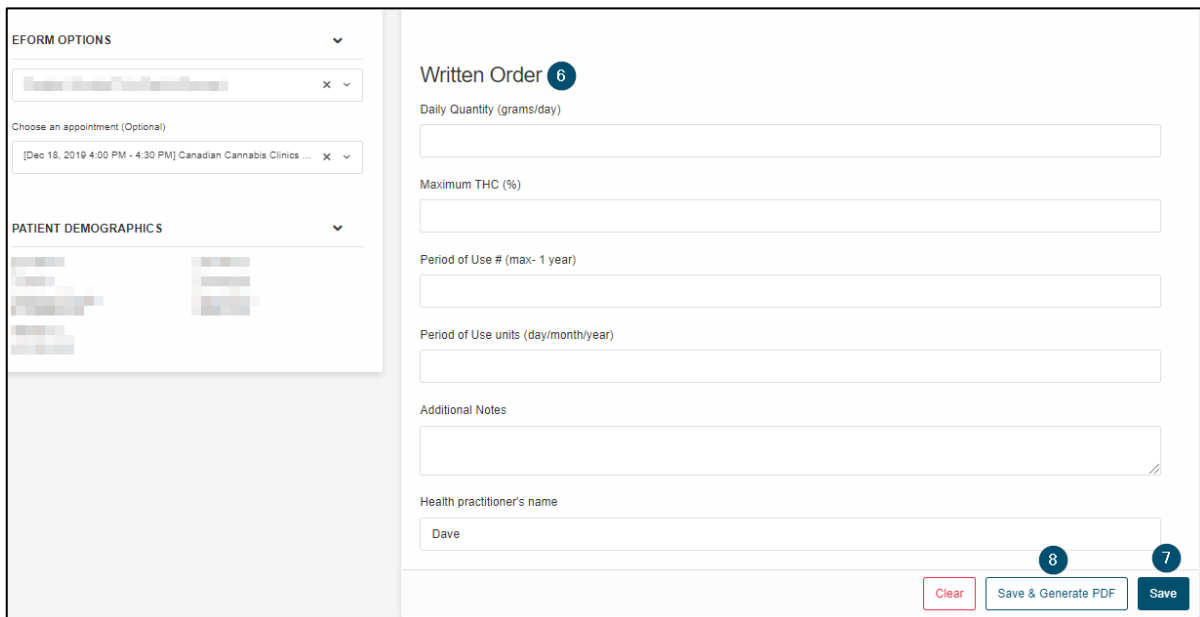
Prescriptions can be added from either the CPP page for a patient (see the [Cumulative Patient Profile \(CPP\)](#) section) or the CPP located within the Encounters section.



1. Look for the E Forms card in the CPP.
2. Click the menu.
3. Click "Add".



4. Select the appropriate eForm.
5. Select the appropriate appointment to link the eForm to it.



6. Complete any required non-populated fields for the written order.
7. Click "**Save**" to save the written order.
8. Click "**Save & Generate PDF**" to save the written order and generate the PDF which can be found under the Documents section within the patient's CPP.

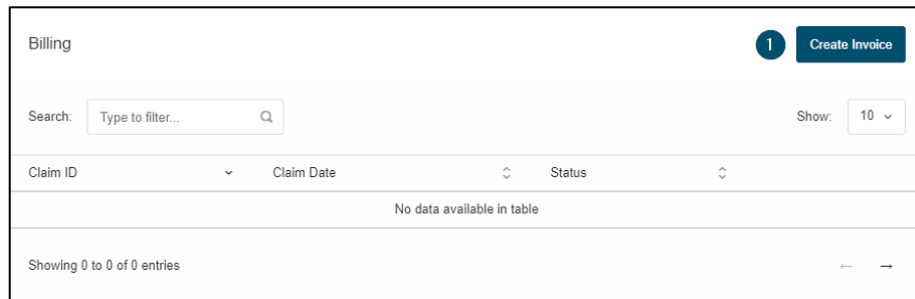
4.5 Billing

ClinicAid has been integrated into the platform to view invoice status from the encounter. There are two ways to create invoices. To access the billing section for an appointment, after scheduling the patient appointment, go to the Appointment Details page.

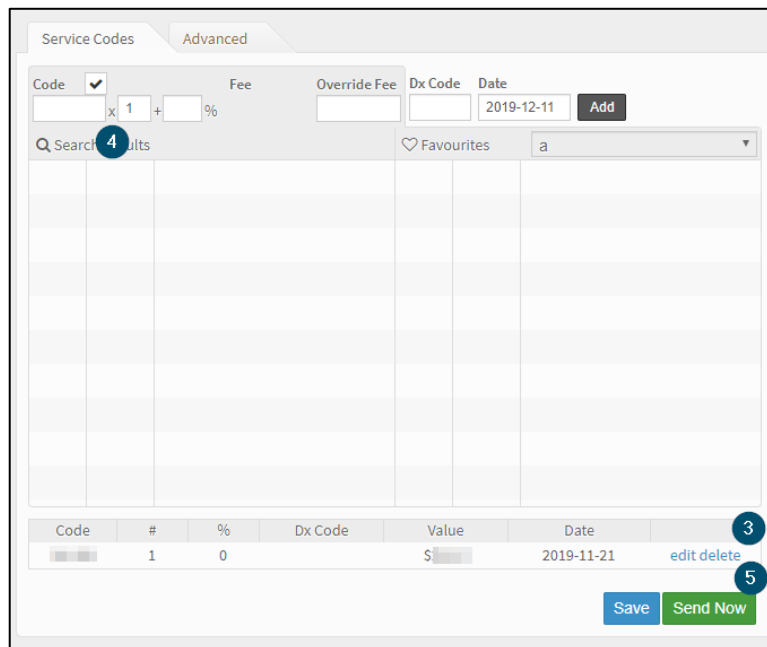
4.5.1 Creating an Invoice

Create an Invoice from Appointment Details

One way to create an invoice is from the appointment details page. To access this billing section for an appointment, after scheduling the patient appointment, go to the Appointment Details page.



1. Under the **Billing** area, click the “**Create Invoice**” button.
2. The ClinicAid system will pop up.

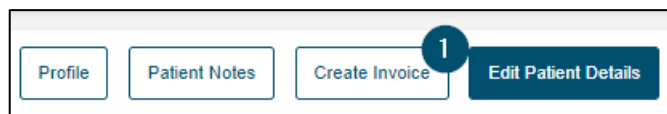


3. **Delete the existing code** at the bottom of the invoice (if applicable).
4. Add the relevant **billing code** to the invoice.
5. Click “**Send Now**” to save the invoice.

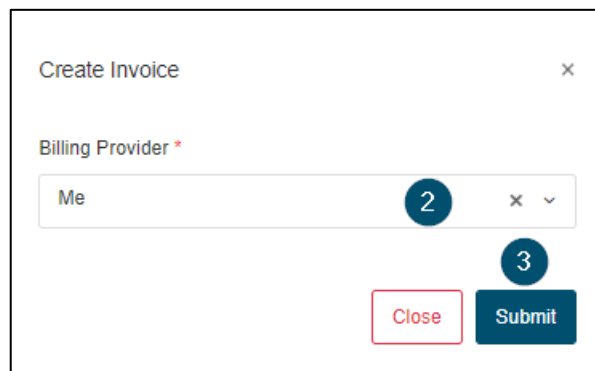
| Billing | | | | Create Invoice |
|--------------------------------------|--|----------------------------------|---------------------------------------|-------------------------------------|
| Search: | <input type="text" value="Type to filter..."/> | <input type="button" value="Q"/> | Show: | 10 <input type="button" value="v"/> |
| Claim ID | Claim Date | Status | | |
| e5f2cabb-2561-45d7-9e09-470c7594a069 | December 3, 2019 | New | <input type="button" value="Pencil"/> | <input type="button" value="Eye"/> |

Create Invoice from Patient Profile/Encounters Pages

The other way to create an invoice is located on the patient ribbon located on the patient profile or the encounters page.



1. Click the “**Create Invoice**” button.



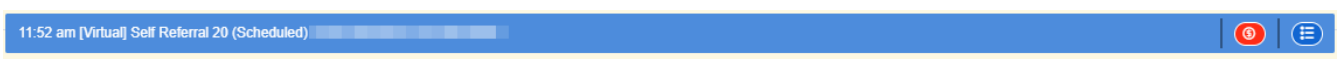
2. Select the appropriate billing provider.
3. Click the “**Submit**” button.

The screenshot shows the 'Service Codes' interface in the 'Advanced' tab. At the top, there are input fields for 'Code', 'Fee', 'Override Fee', 'Dx Code', and 'Date', along with an 'Add' button. Below this is a search bar with a magnifying glass icon and a '5' callout. The main area is a table with columns for 'Code', '#', '%', 'Dx Code', 'Value', 'Date', and 'edit delete'. A '4' callout points to the 'edit delete' link for the first row. At the bottom right, there are 'Save' and 'Send Now' buttons, with a '6' callout pointing to the 'Send Now' button.

4. **Delete the existing code** at the bottom of the invoice (if applicable).
5. Add the relevant **billing code** to the invoice.
6. Click “**Send Now**” to save the invoice.

| Billing | | | | Create Invoice |
|--------------------------------------|--|----------------------------------|-------------------------------------|-------------------------------------|
| Search: | <input type="text" value="Type to filter..."/> | <input type="button" value="Q"/> | Show: | 10 <input type="button" value="v"/> |
| Claim ID | Claim Date | Status | | |
| e5f2cabb-2561-45d7-9e09-470c7594a069 | December 3, 2019 | New | <input type="button" value="edit"/> | <input type="button" value="eye"/> |

Note: If an invoice has not been created for an appointment yet, the **Create Invoice** icon on the **Calendar** will be **RED**.



4.5.2 Editing an Invoice

If an invoice needs to be changed after saving it, use the steps below to edit the existing invoice:

| Billing | | | Create Invoice |
|--------------------------------------|------------------|--------|--|
| Claim ID | Claim Date | Status | |
| e5f2cabb-2561-45d7-9e09-470c7594a069 | December 3, 2019 | New |  1  |

1. In **“Billing”** of Appointment Details page, click the **Edit Invoice** button (pencil icon).
2. A ClinicAid window of the existing invoice will pop up.

5 Virtual Care

5.1 Video Session

5.1.1 Join as a Provider

Use the steps below to join a remote session with a patient.

| Primary Provider | Date/Time | Patient Name | Age | Phone Number | Location | Healthcare Service | Visit Reason | Appointment Status | Confirmation | Invoice Status | Actions |
|------------------|------------------------|--------------|-------|--------------|-------------------|-------------------------|--------------|--------------------|--------------|----------------|---------------------------------|
| [Avatar] | 03/31/2020 8:30 AM | [Name] | [Age] | [Phone] | Markham (Virtual) | Virtual Follow Up Visit | [Reason] | NO SHOW | Unconfirmed | Invoiced | Create Invoice All Appointments |
| [Avatar] | 03/31/2020 10:30 AM | [Name] | [Age] | [Phone] | Markham (Virtual) | Virtual Follow Up Visit | [Reason] | SCHEDULED | Unconfirmed | Incomplete | Create Invoice All Appointments |
| [Avatar] | 03/31/2020 4:30 PM | [Name] | [Age] | [Phone] | Markham (Virtual) | Virtual Follow Up Visit | [Reason] | SCHEDULED | Unconfirmed | Incomplete | Create Invoice All Appointments |

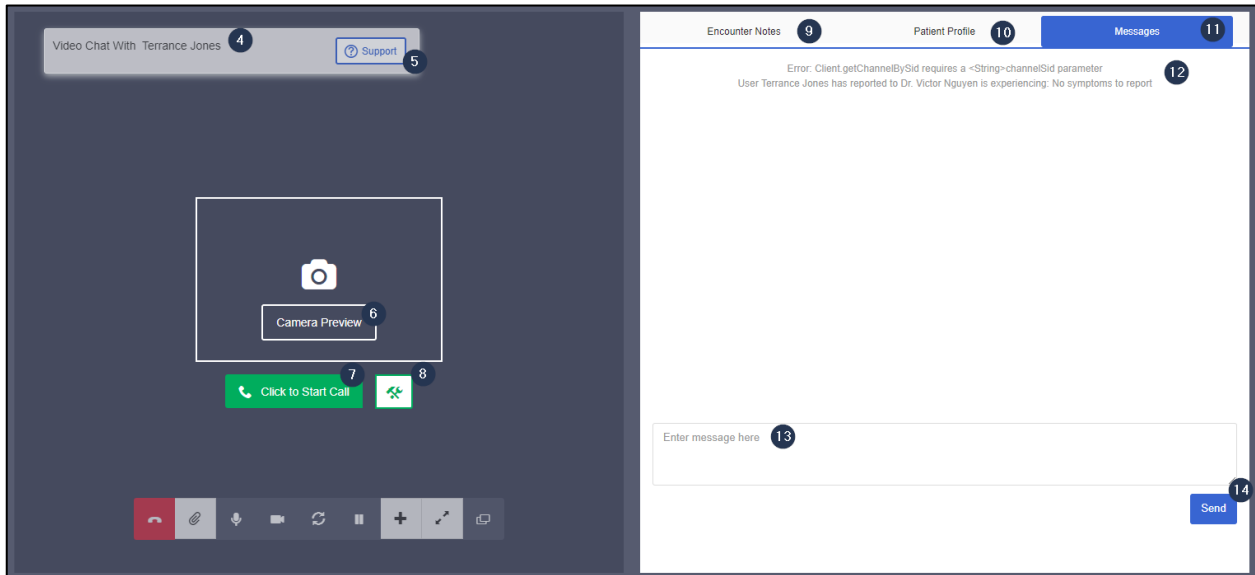
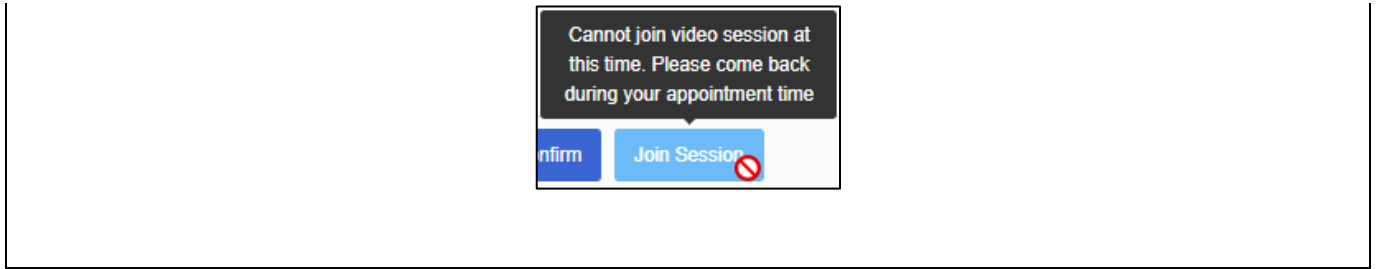
1. After logging into your account, go to **Appointments** and go to the “**Daysheet**” tab.
2. Click the Date/Time of the upcoming appointment.

[Join Session](#)

3. Click the “**Join Session**” button to be directed to the virtual waiting room.

Tip: You can log into your remote session up to the configured minutes in your Organization’s settings. Ask your administrator what this value is.

If you join too early, a notification will indicate to come back later.



4. The **patient's name** will be displayed here.
5. **Support information** will be displayed here.
 - Links to get Technical Support
 - Dial-In information
6. Test your camera by clicking "**Camera Preview**".
7. Click the "**Connectivity Check**" icon to run a diagnostic test on your computer to ensure that you can join without any issues.

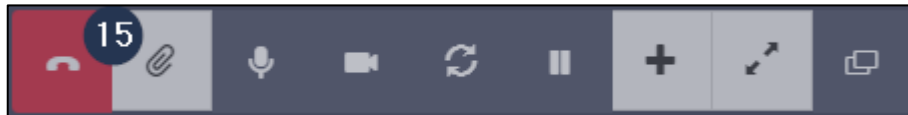
Note: You can run the same check prior to an appointment. For more information, go [here](#).

8. Once ready, click the "**Click to Start Call**" button and you will be taken into the virtual room to meet with the session participants.

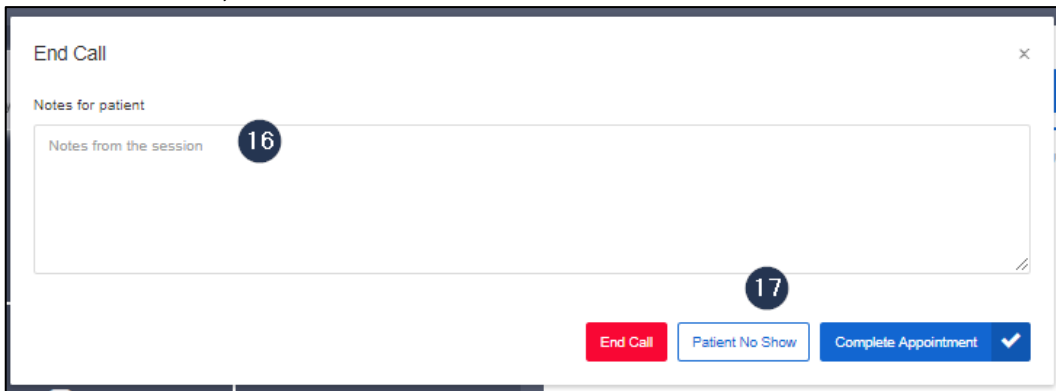
Note: To use video conferencing, you need to allow or enable the use of your Camera and Microphone on your respective browser.

9. Write **Encounter Notes** while speaking with the participants.
10. See the **patient's CPP** while conducting the session.
11. Click the **"Messages"** tab to see the **chat log**.
12. The **patient's reason for visit** will be displayed here.
13. **Type a message** to a participant.
14. Click **"Send"** to send the message to the participants.

Note: Error logs will also appear in the Chat Log. If you have any technical difficulties, please reference the errors to the Support Team.



15. When the call is done, click the "End Call" button to leave the room.

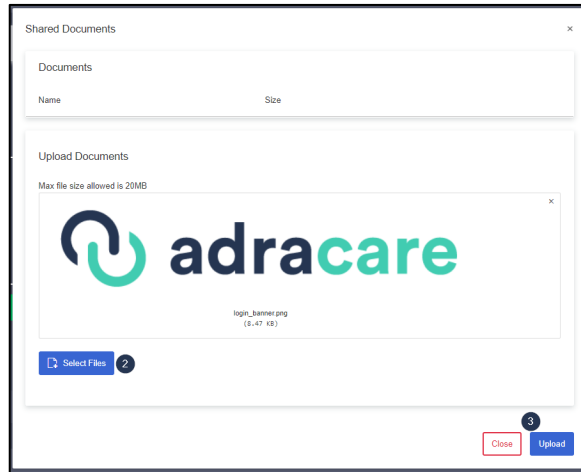


16. Type in a note for the patient as applicable.
17. Choose one of the options to leave the room:
 - a. **End Call** – leave the call
 - b. **Patient No Show** – if the patient does not show up for the appointment
 - c. **Complete Appointment** – mark the appointment as completed and leave the call

Share Attachments

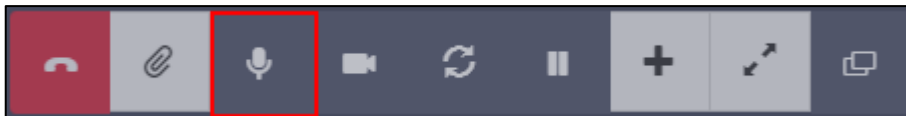


1. Click the **paper clip** to open the **Shared Documents** window



2. **Select a file** from your computer
3. Click **Upload**
4. The patient will be able to download the file during the session. The paper clip also shows on their side.

Mute / Unmute your Microphone



1. Click the **microphone** button to **mute or unmute** the device's microphone.

Turn off and on your camera



1. Click the **camera** to **turn off and on** the device's camera.

Toggle between multiple cameras (works best with mobile devices)



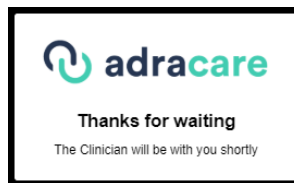
1. Click the **arrows in a circle** to **switch** between the front-facing (selfie) to the back-facing cameras.

On Hold

Pause your session with the patient by clicking the **“On Hold/Resume”** button.



1. **Mute your microphone and turn off your camera** during your session with the patient by clicking the **“On Hold/Resume”** button.
2. The patient will receive the following notification:

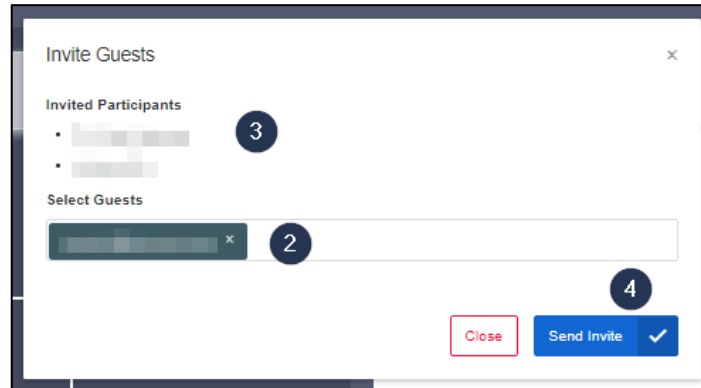


3. **Turn your microphone and turn on your camera** when you are ready by using the **“On Hold/Resume”** button.

Adding a Guest



1. Join the session and click the “**Invite Guests**” button (“+” icon) in the Menu bar.



2. In the “Select Guests” text box, type in the **full email address** of the guest and press **ENTER** or select the **email** from the dropdown.
The email has been properly added to the invitation list when it is highlighted.

Note: A total of 4 participants can be in a remote session. Participants include providers (primary and secondary), the patient, and guests.

3. Click the “**Send Invite**” button to send the guest an email with the instructions to join the session.
4. Confirm that the email has been sent properly by checking the “Invited Participants” list.

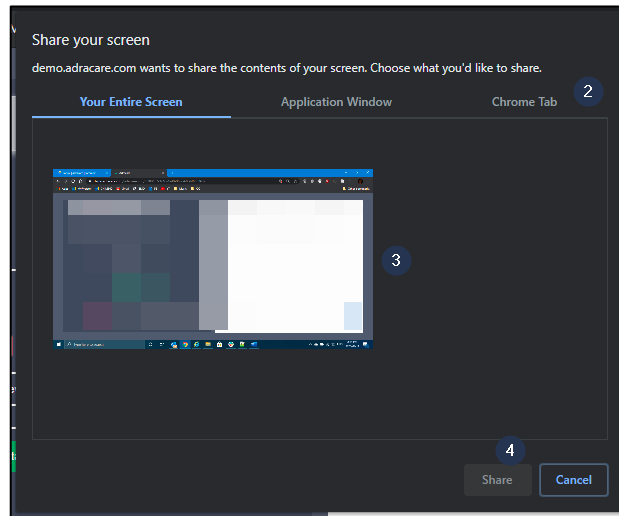
Full Screen



1. Click the **arrows pointing to the outside corners** to **expand** the video feed to the full length of the window.

Screenshare

1. Click the “**Share Screen**” button to send share your screen(s) with patients.



2. Choose the most appropriate screen sharing option for the situation.
3. Select the **screen, window, or tab**.
4. Click **“Share”** to start sharing the screen(s).

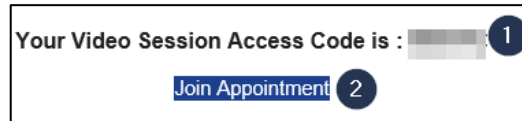


5. Click **“Stop Sharing”** to stop sharing the screen(s).

5.1.2 Join as a Patient

Login-less (System Default)

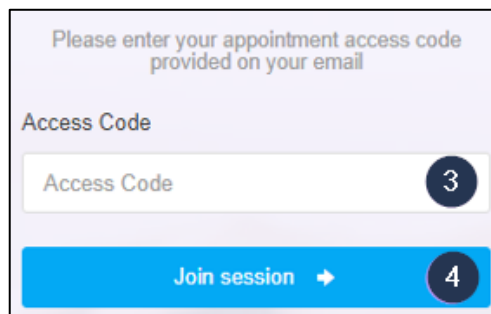
A patient's access link to the appointment will be sent in the appointment confirmation and reminder emails prior to the scheduled start time of the appointment.



1. Take note of the **Video Session Access Code** provided.

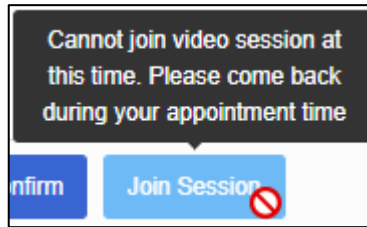
Note: If you did not receive emails from Adracare, please check your Junk/Spam folder.

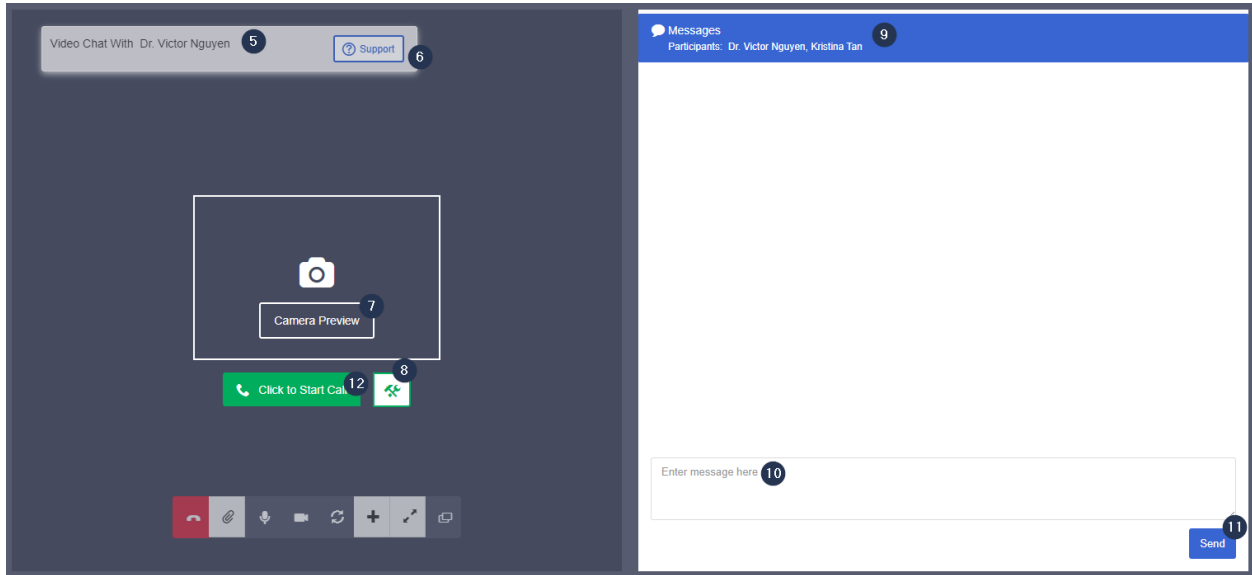
2. Click the "**Join Appointment**" link and the browser should open to the access code landing page.



3. Enter the **Video Session Access Code**.
4. Click the "**Join Session**" button to be directed to the virtual waiting room.

Tip: If you join too early, a notification will indicate to come back later.





5. The **provider's name** will be displayed here.
6. **Support information** will be displayed here.
 - Links to get Technical Support
 - Dial-In information
7. Test your camera by clicking "**Camera Preview**".
8. Click the "**Connectivity Check**" icon to run a diagnostic test on your computer to ensure that you can join without any issues.

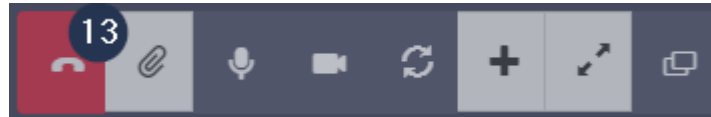
Note: You can run the same check prior to an appointment. For more information, go [here](#).

9. The **chat log** will be displayed here.

Note: Error logs will also appear in the Chat Log. If you have any technical difficulties, please report the errors to the Support Team.

10. **Type a message** to a participant.
11. Click "**Send**" to send the message to the participants.
12. Once ready, click the "**Click to Start Call**" button and you will be taken into the virtual room to meet with the session participants.

Note: To use video conferencing, you need to enable the use of your camera and microphone on your respective browser.

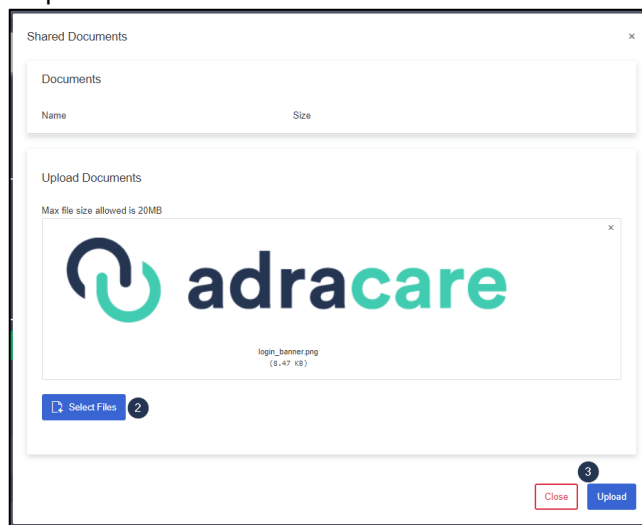


13. When the call is done, click the “End Call” button to leave the room.

Share Attachments



1. Click the **paper clip** to open the **Shared Documents** window



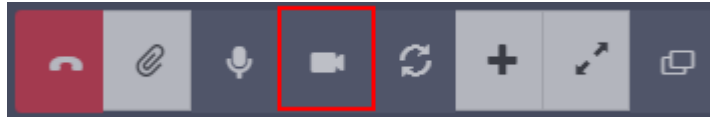
2. **Select a file** from your computer
3. Click **Upload**
4. The provider will be able to download the file during the session. The paper clip also shows on their side.

Mute / Unmute your Microphone



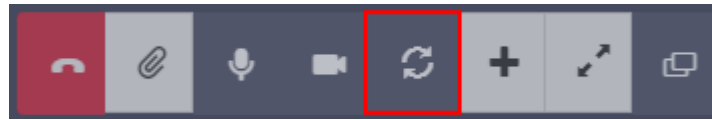
1. Click the **microphone** button to **mute or unmute** the device's microphone.

Turn off and on your camera



1. Click the **camera** to **turn off and on** the device's camera.

Toggle between multiple cameras (works best with mobile devices)



1. Click the **arrows in a circle** to **switch** between the front-facing (selfie) to the back-facing cameras.

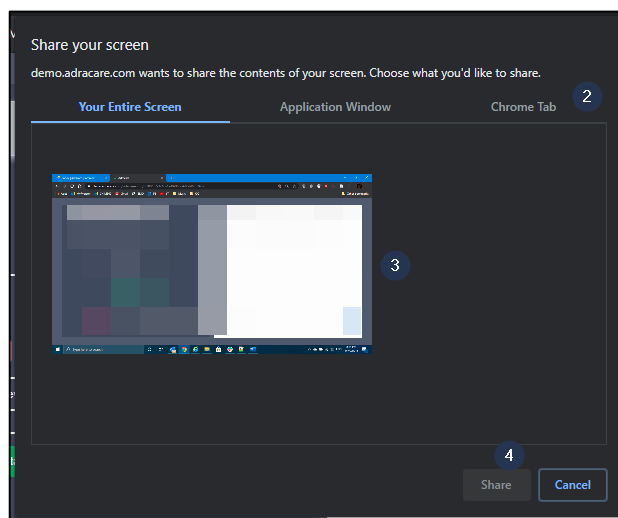
Full Screen



1. Click the **arrows pointing to the outside corners** to **expand** the video feed to the full length of the window.

Screenshare

1. Click the **“Share Screen”** button to send share your screen(s) with patients.



2. Choose the most appropriate screen sharing option for the situation.
3. Select the **screen, window, or tab**.

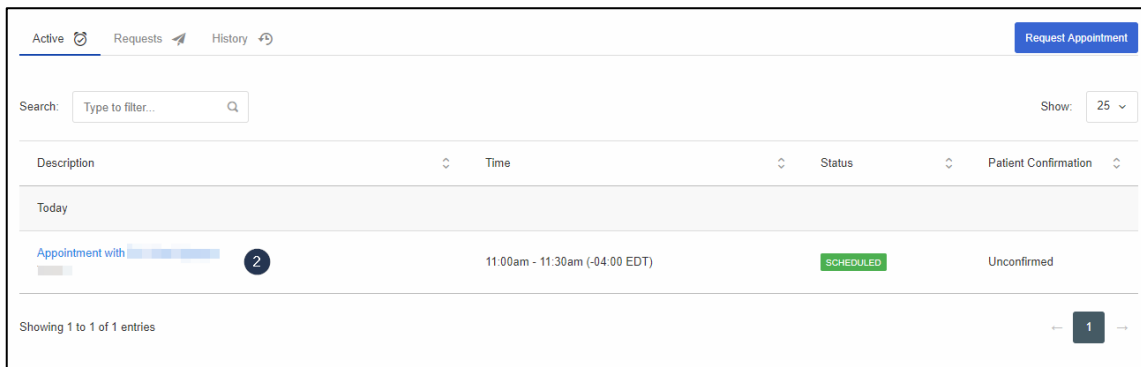
4. Click **“Share”** to start sharing the screen(s).



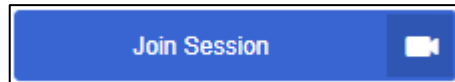
5. Click **“Stop Sharing”** to stop sharing the screen(s).

Login Required

1. After logging into your account, go to **Appointments**.

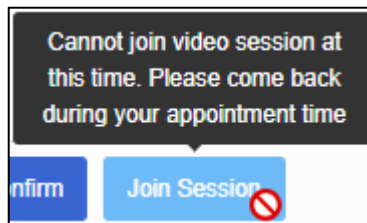


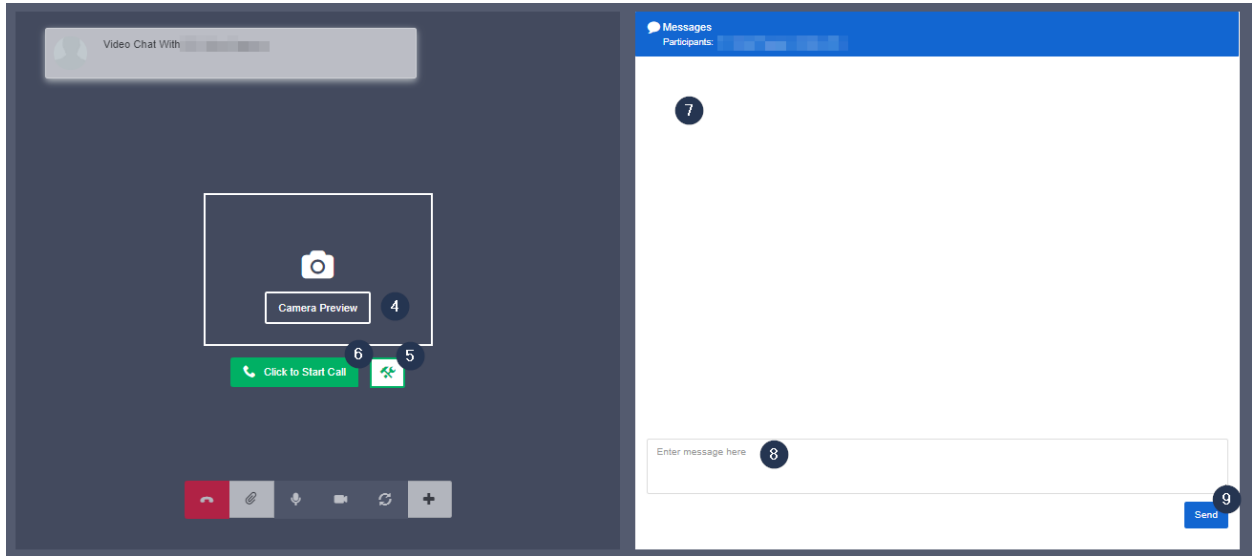
2. Click on the upcoming appointment.



3. Click the **“Join Session”** button to be directed to the virtual waiting room.

Tip: If you join too early, a notification will indicate to come back later.





4. You can test your camera by clicking “**Camera Preview**”.
5. Click the “**Connectivity Check**” icon to run a diagnostic test on your computer to ensure that you can join without any issues.

Note: You can run the same check prior to an appointment. For more information, go [here](#).

6. Once ready, click the “**Click to Start Call**” button and you will be taken into the virtual room to meet with the session participants.

Note: To use video conferencing, you need to enable the use of your camera and microphone on your respective browser.

7. The **chat log** will be displayed here.

Note: Error logs will also appear in the Chat Log. If you have any technical difficulties, please report the errors to the Support Team.

8. **Type a message** to a participant.
9. Click “**Send**” to send the message to the participants.

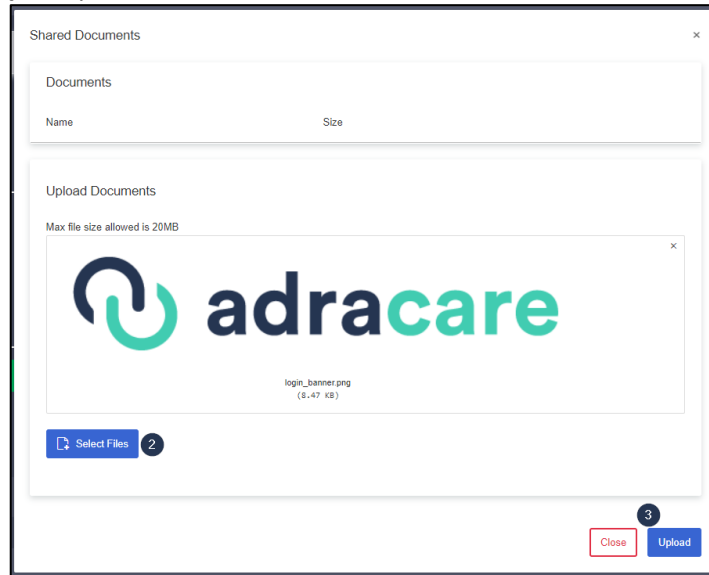


10. When the call is done, click the “**End Call**” button to leave the room.

Share Attachments



1. Click the **paper clip** to open the **Shared Documents** window



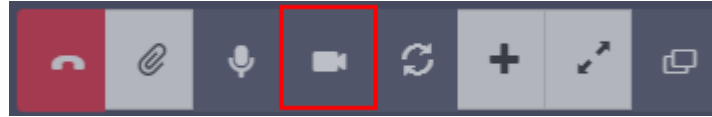
2. **Select a file** from your computer
3. Click **Upload**
4. The provider will be able to download the file during the session. The paper clip also shows on their side.

Mute / Unmute your Microphone



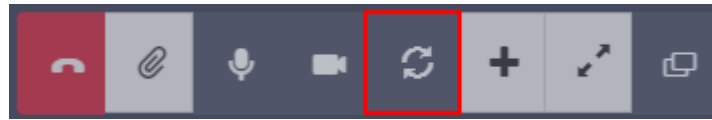
1. Click the **microphone** button to **mute or unmute** the device's microphone.

Turn off and on your camera



1. Click the **camera** to **turn off and on** the device's camera.

Toggle between multiple cameras (works best with mobile devices)



1. Click the **arrows in a circle** to **switch** between the front-facing (selfie) to the back-facing cameras.

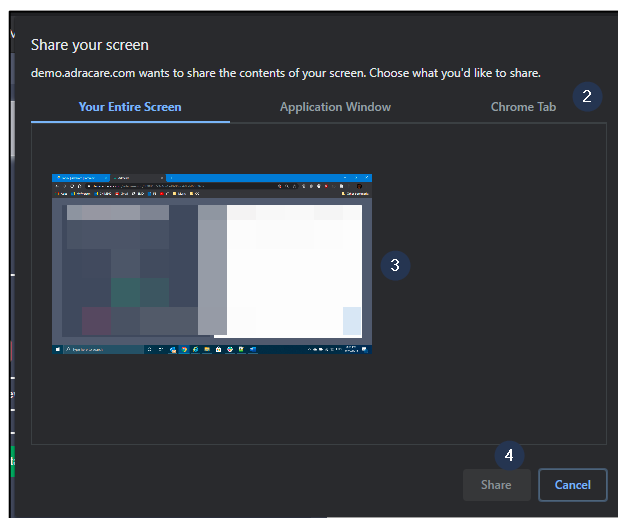
Full Screen



1. Click the **arrows pointing to the outside corners** to **expand** the video feed to the full length of the window.

Screenshare

1. Click the **“Share Screen”** button to send share your screen(s) with patients.



2. Choose the most appropriate screen sharing option for the situation.
3. Select the **screen, window, or tab**.

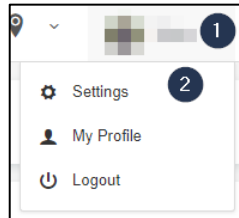
4. Click **“Share”** to start sharing the screen(s).



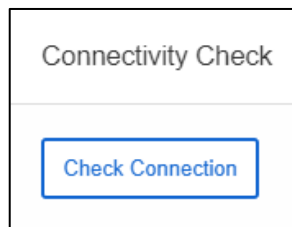
5. Click **“Stop Sharing”** to stop sharing the screen(s).

5.2 Video Session Troubleshooting

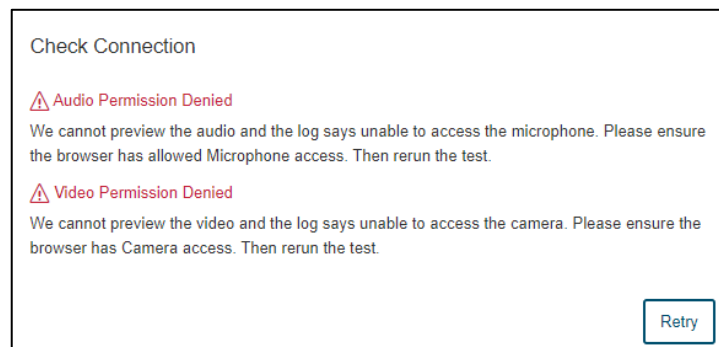
Run a diagnostic test on your computer prior to having a virtual care appointment to ensure that you can join without any issues.



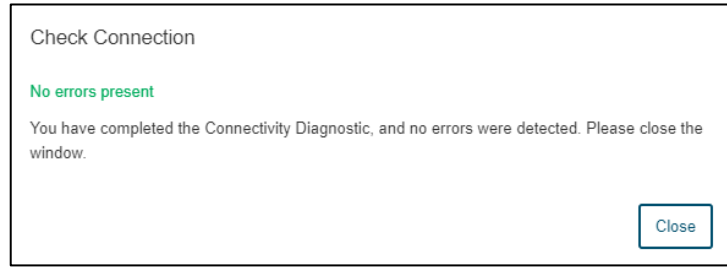
1. Click the **username** at the top-right side of the page.
2. Click **“Settings”**.



3. Under the Connectivity Check section, click **“Check Connection”** to start the test.



4. If the test detects something wrong, it will bring up a notification and a suggestion on how to fix the issue.



5. If the test is successful, it will confirm that there are no issues detected.

5.3 Dial-In Option

Providers and patients can choose to call into an appointment. The dial-in access codes will be included in the appointment confirmation and reminder emails prior to the scheduled appointment.

Dial-in Option

If you simply need voice, you can dial into the appointment by dialing toll-free number: [REDACTED]

[REDACTED] 1

- Account Access Number : [REDACTED] 2
- Appointment Number : [REDACTED] 3
- Session Access Code : [REDACTED] 4

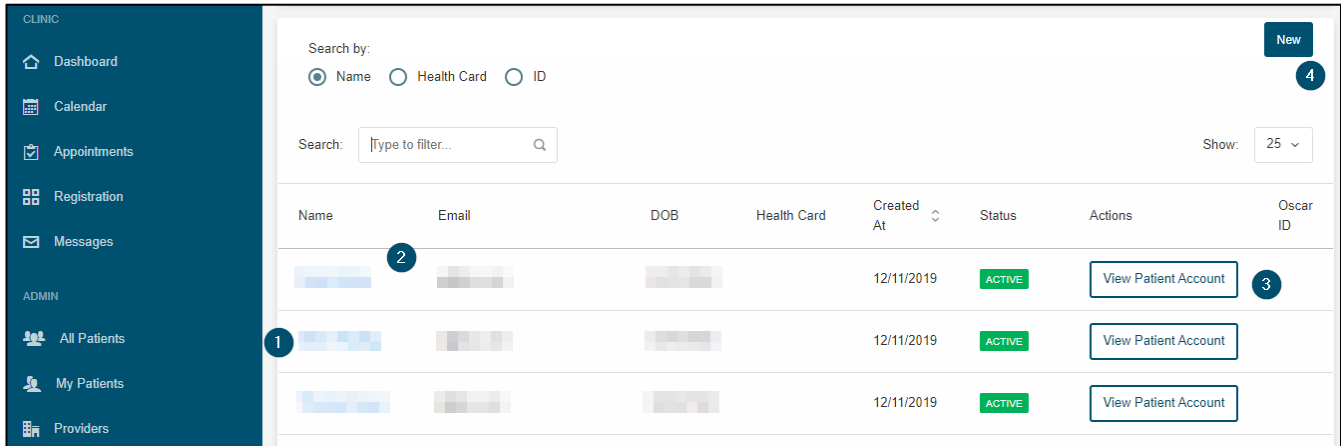
1. Call the toll-free number.
2. When prompted, enter the Account Access Number and press “#”.
3. When prompted, enter the Appointment Number and press “#”.
4. When prompted, enter the Session Access Code and press “#”.
5. You will then join the session with the provider.

Note: Access codes are not meant to be shared.

6 Patient Administration

6.1 All Patients

The **All Patients** section is used to access any patient’s CPP or account settings.



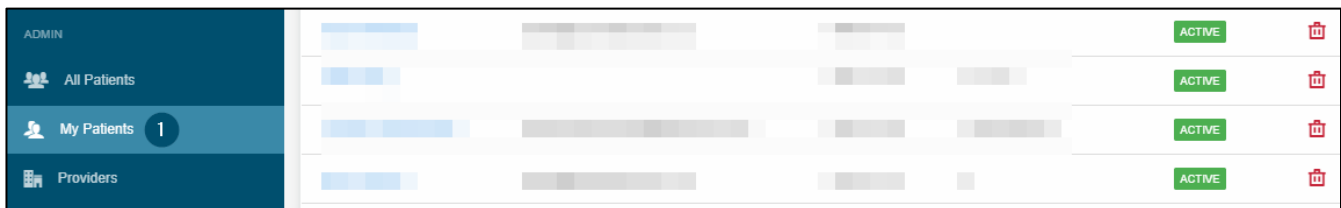
1. Click “**All Patients**”.
2. Click a patient’s name to easily view their CPP. For more information on the CPP, see the [Cumulative Patient Profile \(CPP\)](#) section.
3. Click “**View Patient Account**” to see their account settings.
4. Click “**New**” to create a new patient. For complete the details on adding a new patient, see the [Create a Patient](#) section.

6.2 My Patients

The **My Patients** section is used for a physician to view a list of their current patients, remove a patient from their list as well as access a patient’s CPP.

Note: A patient will show in **My Patients** if at least 1 appointment has been scheduled with the provider.

To access the list of your current patients:



1. Click “**My Patients**”.

6.2.1 View a patient's CPP

| Name | Email | DOB | Primary Phone Number | Status | Action |
|------------|------------|------------|----------------------|--------|--------|
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | ACTIVE | |
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | ACTIVE | |
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | ACTIVE | |

- Click a patient's name to easily view their CPP. For more information on the CPP, see the [Cumulative Patient Profile \(CPP\)](#) section.

6.2.2 Add a new patient

| Name | Email | DOB | Primary Phone Number | Status | Action |
|------------|------------|------------|----------------------|--------|--------|
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | ACTIVE | |
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | ACTIVE | |

Search:

Show:

New

- Click **"New"** to create a new patient. For complete the details on adding a new patient, see the [Create a Patient](#) section.

6.2.3 Delete an existing patient from my list

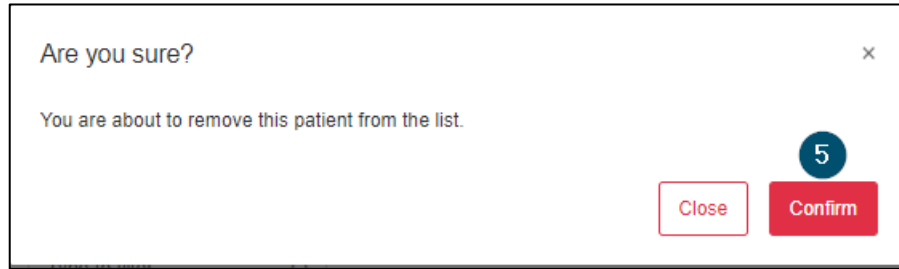
| Name | Email | DOB | Primary Phone Number | Status | Action |
|------------|------------|------------|----------------------|--------|--------|
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | ACTIVE | |
| [Redacted] | [Redacted] | [Redacted] | [Redacted] | ACTIVE | |

Search:

Show:

New

- Click the **Trash Bin** icon to remove a patient from your roster.



5. Click "**Confirm**" to remove the patient from your roster.

6.3 Cumulative Patient Profile (CPP)

6.3.1 CPP Overview

The Cumulative Patient Profile (CPP) is easily accessible from:

- Appointment Details
- Patient Profile
- Encounter List
- The Virtual Session

The screenshot displays three side-by-side cards in the CPP interface:

- Appointments Card:** Contains a table with columns 'Healthcare Service', 'Provider', and 'Date'. It lists 'First Assessm...' on 11/07/2019 and 'Follow Up' on 11/12/2019. A 'View all' button is at the bottom.
- Medications Card:** Contains a table with columns 'Medication' and 'Notes'. It displays 'There are no records'.
- Documents Card:** Contains a table with columns 'Name', 'Source', and 'Recorded On'. It lists 'medical_docu...' with a recorded date of '2019-12-16T1...'. A 'View all' button is at the bottom.

Aspects of the patient profile is broken down by sections (known as “cards”). A brief description of each card is listed below.

| CPP Section | Description |
|-----------------------|---|
| Document | Documentation that has been uploaded, saved or published for the patient (including, but not limited to consult reports, scanned documents, etc.) |
| E Forms | Electronically editable forms that will be prepopulated and can be used for “medical documents”. |
| Appointments | List of the patient’s past and future appointments |
| Invoices | List of the patient’s past invoices (if applicable) |
| Questionnaires | List of the patient’s past questionnaires (if applicable) |
| Medications | List of the patient’s past and present medications |
| Problems | List of the patient’s past and present problems |
| Family History | List of the patient’s family medical history |
| Risk Factors | List of the patient’s risk factors |

| | |
|--------------------------|--|
| Procedures | List of the patient’s past and future procedures |
| Immunizations | List of the patient’s past and current immunizations |
| Vital Sign Events | List of the patient’s vital signs |
| Allergies | List of the patient’s allergies |
| Statuses | List of statuses imported from Juno Oscar v12 |

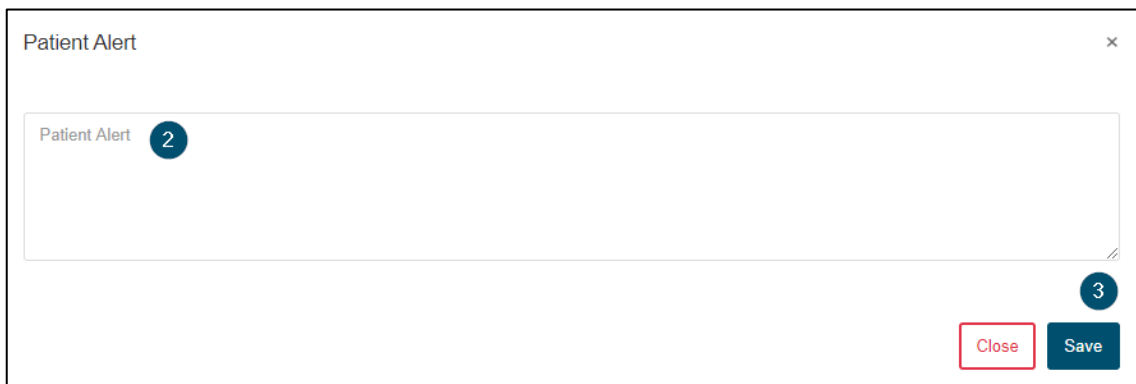
6.3.2 Patient Alerts

A patient alert should be used when a user wants to highlight a patient characteristic that will always be viewable on the patient’s CPP and appointment details.

Updating Patient Alerts



1. Click “**Edit**”.



2. Type in an **alert** in the textbox.
3. Click “**Save**”.

6.3.3 Questionnaires

View Questionnaire

1. Under “**All Patients**” or “**My Patients**”, select the name of the patient to go to the **Patient Profile** or **Encounters**
2. Go to the Questionnaire card and click on the questionnaire you are seeking to view.
3. A modal should open showing the questionnaire. If the questionnaire has been completed, then the questionnaire will display the saved responses.

Note: You will not be able to make edits.

Edit Questionnaire

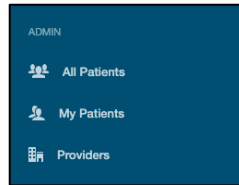
1. Under “**All Patients**” or “**My Patients**”, select the name of the patient to go to the **Patient Profile** or **Encounters**
2. Go to the Questionnaire card and click on the View All button
3. Then click on the Edit button for the questionnaire you want to edit.
4. A modal should open showing the questionnaire. If the questionnaire has been completed, then the questionnaire will display the saved responses.

Note: You can make edits to the responses from here and save them.

7 User Administration

7.1 Creating a Provider

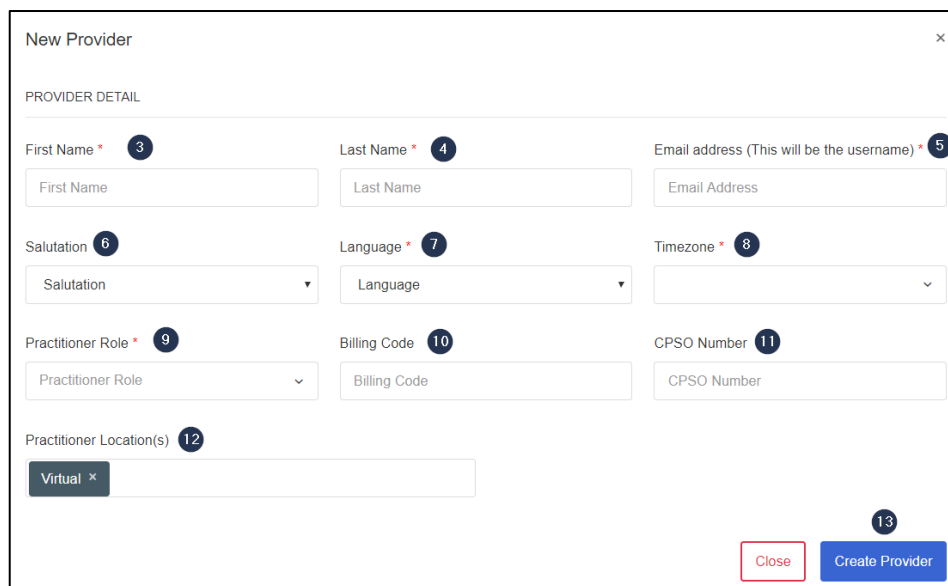
Use the steps below to create a provider profile.



1. Under **Admin**, click on **Providers**.



2. Click “New” on the top-right corner and the **New provider** window will open.

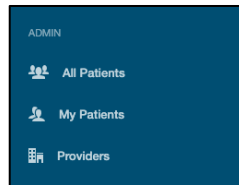
A screenshot of a 'New Provider' form window. The window title is 'New Provider' with a close button (X) in the top right. Below the title is a section header 'PROVIDER DETAIL'. The form contains several input fields and dropdown menus, each with a numbered callout: 3. First Name (text input), 4. Last Name (text input), 5. Email address (This will be the username) (text input), 6. Salutation (dropdown menu), 7. Language (dropdown menu), 8. Timezone (dropdown menu), 9. Practitioner Role (dropdown menu), 10. Billing Code (text input), 11. CPSO Number (text input), 12. Practitioner Location(s) (checkbox labeled 'Virtual' and a text input), and 13. 'Create Provider' button (blue) and 'Close' button (red) at the bottom right.

3. Type the provider’s **first name**.
4. Type the provider’s **last name**.
5. Type the provider’s **email address**.
6. Select the provider’s **salutation**.
7. Select the provider’s **language** preference.
8. Select the provider’s **timezone**.
9. Select the appropriate **practitioner role** for the provider.
10. If applicable, type the provider’s **billing code**.
11. If applicable, type the provider’s **CPSO Number**.
12. Select all applicable **practitioner locations** for the provider.
13. Click “**Create Provider**” to create the provider profile.

- An email will be sent to the user to claim their account which is valid for **72 hours**. Use the following guide to activate the user's account: [Claiming an Account](#)

7.2 Creating an Admin

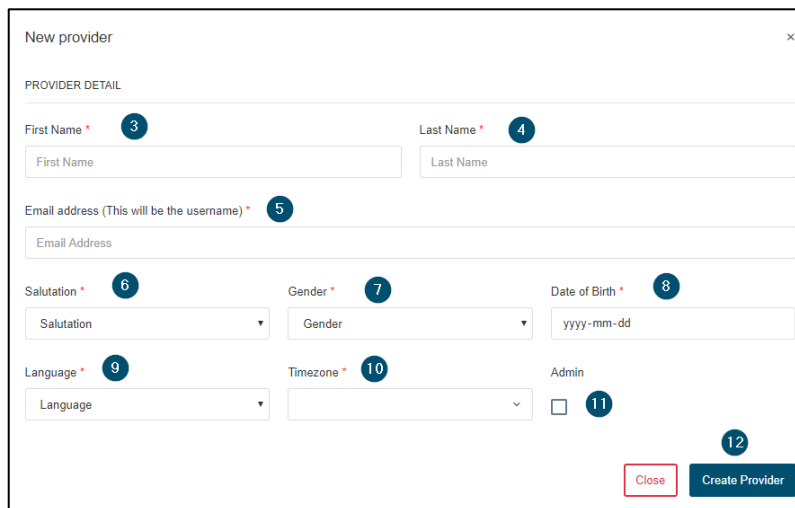
Use the steps below to create an admin profile.



- Under **Admin**, click on **Providers**.



- Click "New" on the top-right corner and the **New provider** window will open.

A screenshot of a "New provider" form window. The window title is "New provider" with a close button (X) in the top right. Below the title is a section header "PROVIDER DETAIL". The form contains several input fields and dropdown menus, each with a numbered callout (3-12):

- 3: First Name input field
- 4: Last Name input field
- 5: Email address (This will be the username) input field
- 6: Salutation dropdown menu
- 7: Gender dropdown menu
- 8: Date of Birth input field with a "yyyy-mm-dd" placeholder
- 9: Language dropdown menu
- 10: Timezone dropdown menu
- 11: Admin checkbox (unchecked)
- 12: Create Provider button (dark blue)

At the bottom right of the form is a "Close" button (red outline).

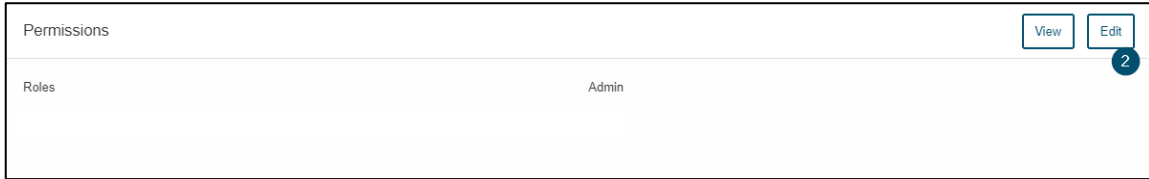
- Type the provider's **first name**.
- Type the provider's **last name**.
- Type the provider's **email address**.
- Select the provider's **salutation**.
- Select the provider's **gender**.
- Select the provider's **birthday**.
- Select the provider's **language** preference.
- Select the provider's **timezone**.
- Leave "**Admin**" as unchecked.
- Click "**Create Provider**" to create the provider profile.

25. An email will be sent to the user to claim their account which is valid for **72 hours**. Use the following guide to activate the user's account: [Claiming an Account](#)

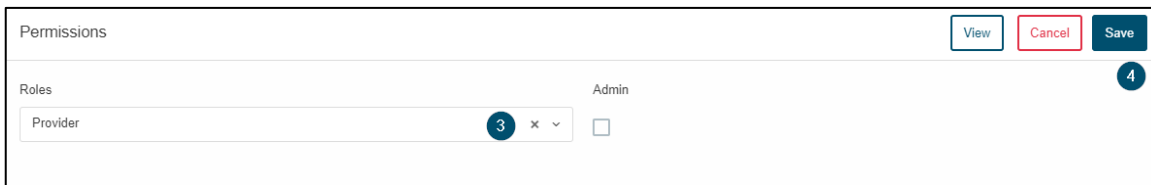
7.3 User Roles

After a provider or admin is created, a user role needs to be assigned to their profile.

1. Access the user profile and go to the “**Permissions**” section.



2. Press Edit.



3. Select a **role** from the drop down.
4. Click **Save**.

Available Provider or Admin Roles

- Provider
- MOA
- IMG
- Prescriber
- Provider-Admin
- Coordinator
- Booking/Intake
- System Administrator
- Manager
- Counsellor
- Analyst
- Communication
- Super User

7.4 Create a Patient

There are two methods to create a patient:

1. Patient Sign Up Form
2. Admin

7.4.1 Patient Sign Up Form

Refer to the [Create a Patient](#) section to using the Patient Sign Up Form.

7.4.2 Admin

There are three methods to create a patient:

- [All Patients](#)
- [My Patients](#)
- When creating an appointment

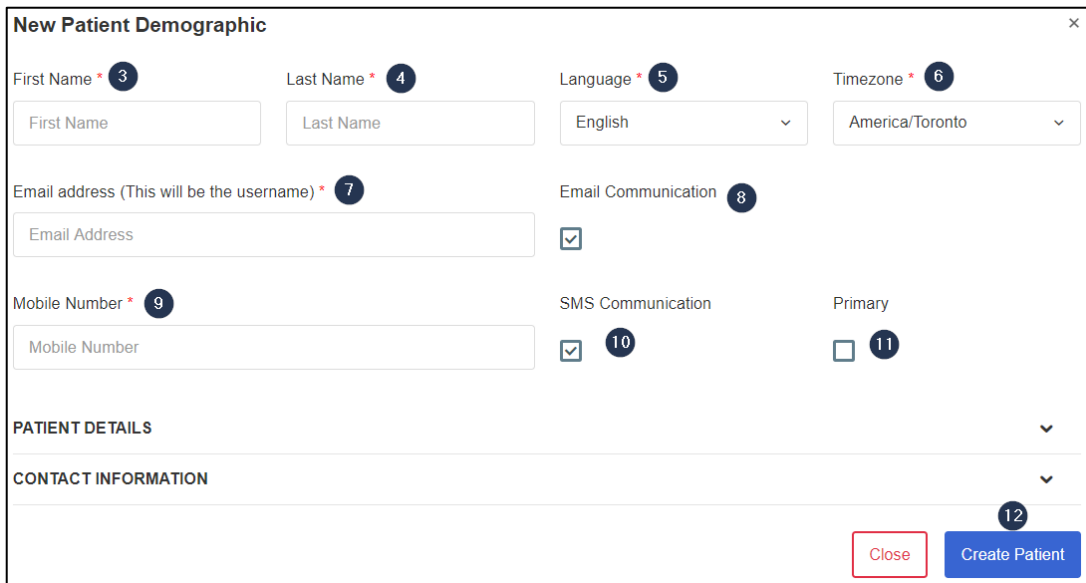
1. Under **Admin**, click on **“All Patients”** or **“My Patients”** or **create a new appointment**.



2. Click **“New Patient”** to open the **New patient** window.

Basic Patient Settings

If you want to add patients to the system with minimum information, use the Basic Patient view of New Patient Demographic form:

A screenshot of the "New Patient Demographic" form. The form is titled "New Patient Demographic" and has a close button (X) in the top right corner. It contains several input fields and checkboxes. The fields are: "First Name" (3), "Last Name" (4), "Language" (5) with a dropdown menu showing "English", "Timezone" (6) with a dropdown menu showing "America/Toronto", "Email address (This will be the username)" (7), "Mobile Number" (9), "Email Communication" (8) with a checked checkbox, "SMS Communication" (10) with a checked checkbox, and "Primary" (11) with an unchecked checkbox. Below these fields are two expandable sections: "PATIENT DETAILS" and "CONTACT INFORMATION". At the bottom right of the form are two buttons: "Close" and "Create Patient" (12).

3. Type the patient's **first name**.
4. Type the patient's **last name**.
5. Select the patient's preferred **language**.
6. Select the patient's timezone.
7. Enter the patient's **email address**.
8. Select **Email Communication** if the patient would like to receive notifications by email.

Note: Patients will need this checked in order to receive their appointment links and access codes by email.

9. Enter the patient's **mobile number**.
10. If applicable, select **SMS Communication** if the patient would like to receive notifications by SMS.

Note: If you do not want to add a patient's mobile number, uncheck **SMS Communication** and leave the **mobile number** field blank.

11. Select **Primary** if the entered mobile number is the patient's **Primary Number**.
- 12.



13. Click "**Create Patient**".
14. An email will be sent to the user to claim their account which is valid for **72 hours**. Use the following guides to activate the user's account: [Claiming an Account](#).

Advanced Patient Settings

You can add more information to a patient's profile than the Basic fields



1. Expand the **Patient Details** and **Contact Information** sections by clicking the arrow and fill out the desired fields.

PATIENT DETAILS ^

Salutation Gender Date of Birth Phone Only Communication

Salutation Gender yyyy-mm-dd

Address

Address

Health Card Number Version Code Issued By [Validate Health Card](#)

Health Card Number Version Code Issued By [Validate Health Card](#)

Referring Provider Qualified Veteran ID Locations

Select a provider None Veteran ID Locations

Alerts

Alerts

2. Select the patient's **salutation**.
3. Select the patient's **gender**.
4. Select the patient's **date of birth**.
5. Select "**Phone Only Communication**" if the patient would like to be called for any appointment notification. No emails or SMS messages are sent.
6. Enter the patient's **address**.
7. Enter the **patient's health card information**.
8. Validate the patient's **health card information**.
9. Select the patient's **referring provider**.
10. Select if the patient is **qualified**.
11. Type the patient's **Veteran ID**, if applicable.
12. Select the location the **patient** will be treated.
13. Type in a **patient alert** that other users will see on the Patient's Profile and their Appointment Details.

| CONTACT INFORMATION ^ | | |
|--|---|--|
| Primary Phone Number | Phone Type | Description |
| <input type="text" value="Primary Phone Number"/> | <input type="text" value="Phone Type"/> ▾ | <input type="text" value="Description"/> |
| Secondary Phone Number | Phone Type | Description |
| <input type="text" value="Secondary Phone Number"/> | <input type="text" value="Phone Type"/> ▾ | <input type="text" value="Description"/> |
| Extra Phone Number | Phone Type | Description |
| <input type="text" value="Extra Phone Number"/> | <input type="text" value="Phone Type"/> ▾ | <input type="text" value="Description"/> |
| EMERGENCY CONTACT/CARETAKER | | |
| First Name, Last Name, Relationship | Phone Number | |
| <input type="text" value="First Name, Last Name, Relationship"/> | <input type="text" value="Phone Number"/> | |

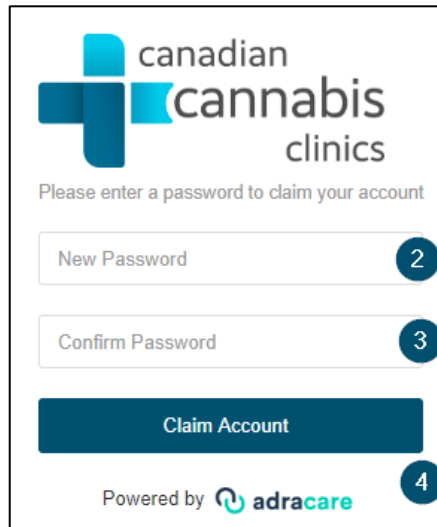
14. Add additional patient **contact numbers**.
15. Add a **patient's emergency contact** information.
16. When finished filling out the desired fields, click "**Create Patient**" to create the patient profile.

7.5 Claiming an Account

Use the steps below to claim an account.

After an administrator creates the account, the user will receive an email to activate it.

1. Click “**Access Account**” to create the profile password.



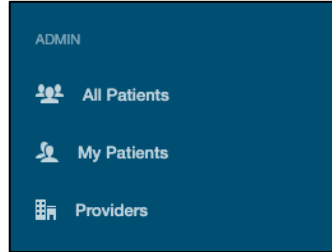
The screenshot shows a web form for claiming an account. At the top is the logo for 'canadian cannabis clinics' with a blue cross icon. Below the logo is the text 'Please enter a password to claim your account'. There are two input fields: 'New Password' and 'Confirm Password'. A dark blue button labeled 'Claim Account' is positioned below the fields. At the bottom, it says 'Powered by adracare' with the adracare logo. Numbered callouts (2, 3, 4) are placed to the right of the 'New Password' field, the 'Confirm Password' field, and the 'Claim Account' button respectively.

2. Type the new **password**.
3. Re-type **Step 2** to confirm the **password**.
4. Click the “**Claim Account**” button to activate the account.

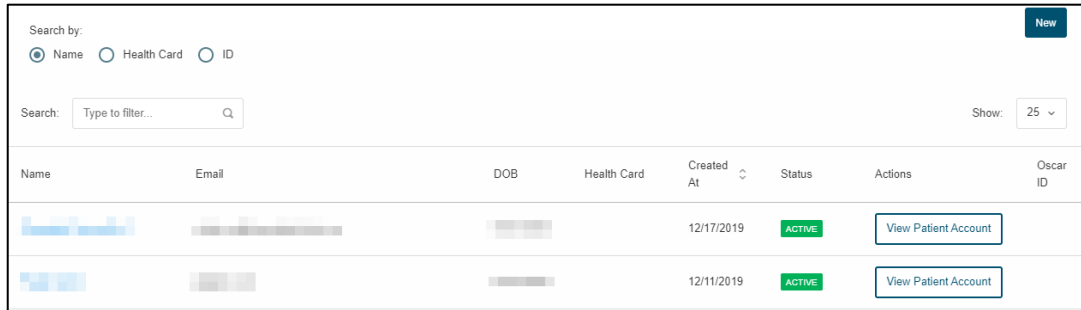
Note: If the user did not receive an email, you can have them to check their Junk/Spam folder before re-sending the email.

7.6 Re-sending the email invitation to claim the user’s account

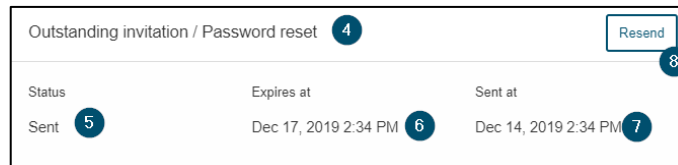
If the user does not claim the account within 72 hours or the original email cannot be found, the administrator can re-send the email invitation.



1. Find the user in **All Patients**.



2. Confirm that the **status** of the user is *“Initialized”*. This means that the user was created, but not activated.
3. Under Actions column, click on the **View Patient Account** button associated to the patient name.

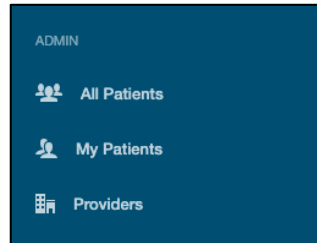


4. Go to the **Outstanding invitation / Password reset** component.
5. Check if the **status** of the invitation is *“Sent”* or *“Expired”*:
 - o Sent: Invitation was sent and is still valid
 - o Expired: Invitation was sent and is not valid
6. The **time** the invitation will **expire**.
7. The **time** the invitation was **sent last**.
8. **Resend** the invitation email to the user.

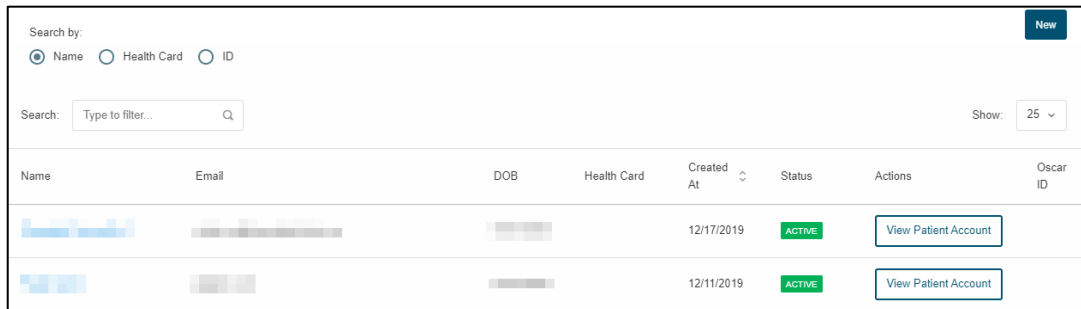
Statuses defined

- **Initialized** – User account has been created, but not claimed
- **Active** – User account has been claimed by the user or activated manually
- **Deactivated** – An active account has been disabled by an administrator

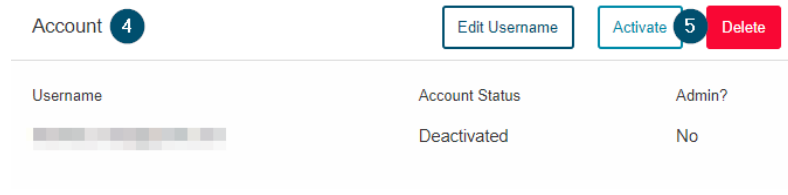
7.7 Activating a User Account



1. Find the user in **All Patients**.



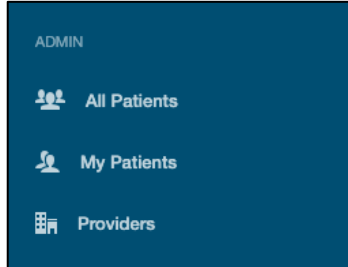
2. Confirm that the **status** of the user is *“Initialized”* or *“Deactivated”*.
3. Under **Actions** column, click on the **View Patient Account** button.



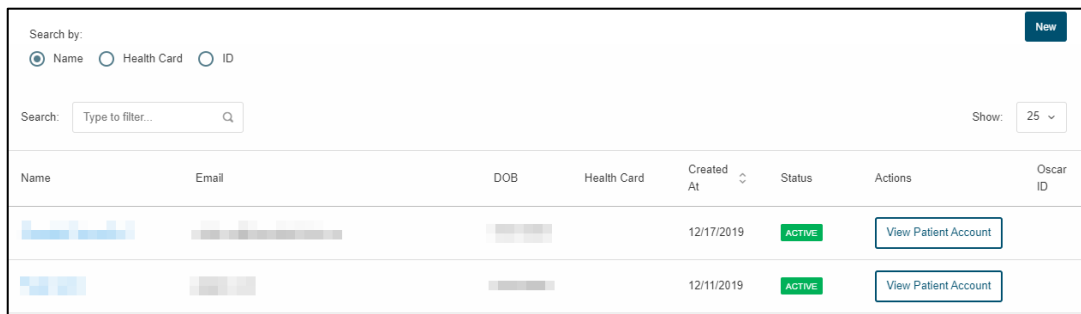
4. Go to the **Account** component.
5. Click **Activate**.
6. The user’s status will be updated to **Activated**.

7.8 Deactivating a User Account

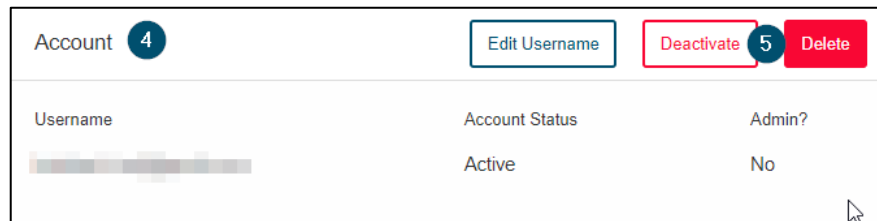
Should a user be no longer authorized to access the platform anymore, you can deactivate the account to block their access.



1. Find the user in **All Patients**.



2. Confirm that the **status** of the user is "Active".
3. Under Actions column, click on the View Patient Account button.

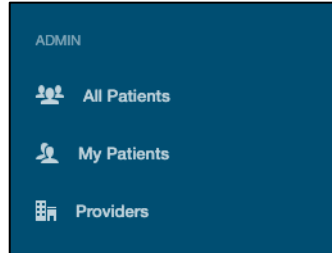


4. Go to the **Account** component.
5. **Deactivate** the account.
6. The user's status will be updated to **Deactivated**.

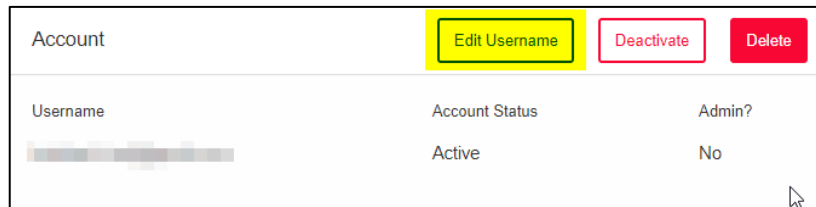
7.9 Changing a Username

The patient may request to change their username for their own reasons (e.g., their email was hacked):

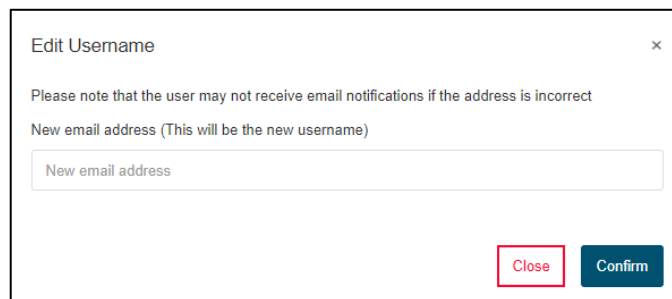
1. Confirm the old username of the user.
2. Confirm the user's new email address.



3. Find the user in **Patients**.
4. For security purposes, ask the user for the birthday on their profile.
 - a. **If the birthday matches:**

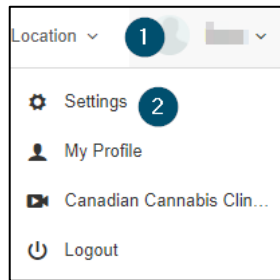


- i. Click **"Edit Username"**.

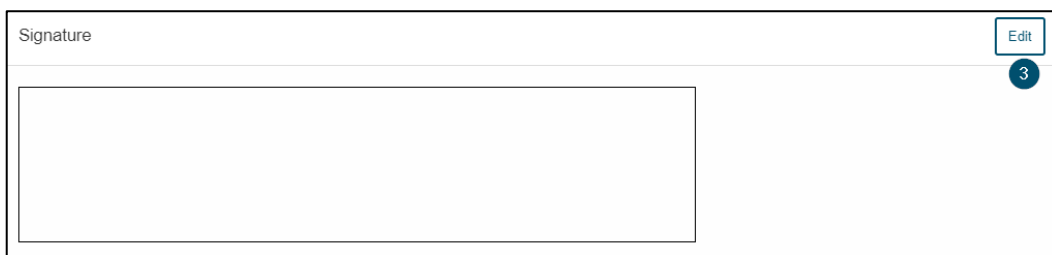


- ii. Input the **new email** in correctly.
 - iii. **Confirm** the **new email**.
 - iv. Have the user **log out and log in** with the new email.
 - v. The password should be the same.
 - vi. Advise the user to change their password, if needed.
- b. **If the birthday does not match**, advise the user to contact the clinic administration to validate them and change their username (using the provided steps in **4a**).

7.10 Creating a Signature



1. Click the **username** at the top-right side of the page.
2. Click “**Settings**”.



3. Click “**Edit**”.

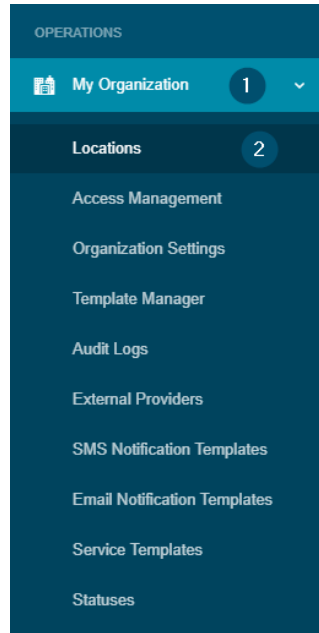


4. Use a mouse to **sign** within the box.
5. Click “**Save**”.

8 Organization Setup

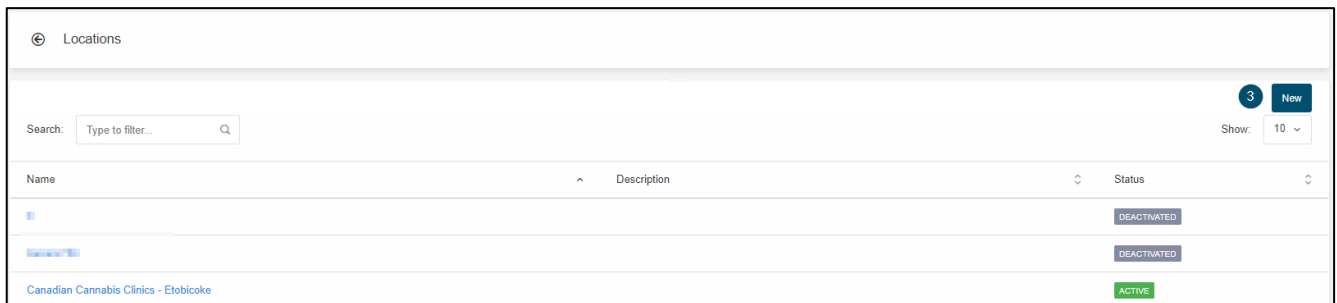
8.1 Locations

Locations will allow you to add/manage the locations within the system.



1. Click on “My Organization”.
2. Click “Locations”.

8.1.1 Add a new location



3. Click “New”.

4. Complete details for the location.
5. Click **“Create Location”**.

8.1.2 Edit an existing location

After loading the list of locations by following steps 1 and 2 from section 9.1

| Name | Description | Status |
|---------------------------------------|-------------|-------------|
| | | DEACTIVATED |
| | | DEACTIVATED |
| Canadian Cannabis Clinics - Etobicoke | | ACTIVE |

3. Click on a location name to edit.

Details 4 [Edit](#) [Deactivate](#)

| | | |
|---|--------------|--|
| Name | Email | Status |
| Canadian Cannabis Clinics - Etobicoke | | ACTIVE |
| Address | Address Type | Phone Number |
| 2405 Lake Shore Blvd W Suite 302, Etobicoke, ON M8V 1C6 | Office | (888) 256 - 7043 |
| Fax Number | | |
| (855) 921-1900 | | |
| Description | | |

4. Click on Edit.

Details [Cancel](#) [Save](#) 5

| | | |
|--|-------------------------------------|--|
| Name * | Email | Status |
| <input type="text" value="Canadian Cannabis Clinics - Etobicoke"/> | <input type="text" value="Email"/> | ACTIVE |
| Address * | Address Type | Phone Number |
| <input type="text" value="2405 Lake Shore Blvd W Suite 302, Etobicoke, ON M8V 1C6"/> | <input type="text" value="Office"/> | <input type="text" value="(888) 256 - 7043"/> |
| Fax Number | | |
| <input type="text" value="(855) 921 - 1900"/> | | |

5. After modifying the location details click “Save”.

Rooms 6 [New](#)

Search: Show:

| Name | Description | Room Type | Room Groups | Status |
|----------------------------|-------------|-----------|-------------|--------|
| No data available in table | | | | |

Showing 0 to 0 of 0 entries

6. Click “New” to add a new room to the location (if required).

New Room ✕

Name * **7**

Room Type Room Groups

Room Type Room Groups

Description

Close **8** Create Room

7. Complete the details for the room.
8. Click **“Create Room”**.

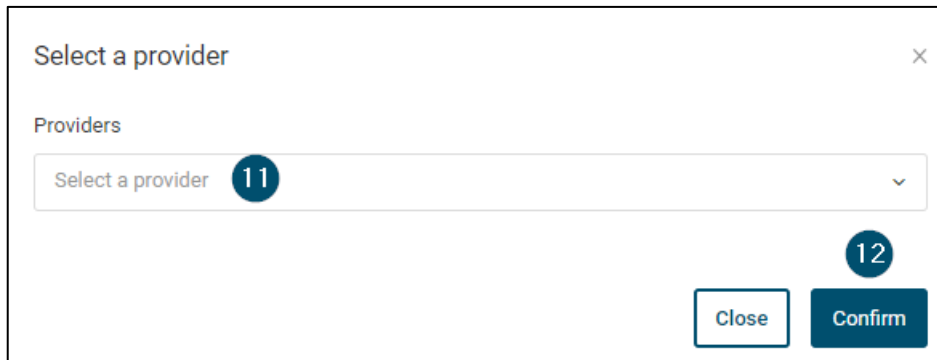
Providers list 10 Add

Search: Q Show: 10

| Name | Email | |
|---------------|-------------------|--------------------------|
| 001 123456789 | 123456789@ora.com | 9 🗑️ |
| 001 123456789 | 123456789@ora.com | 🗑️ |
| 001 123456789 | 123456789@ora.com | 🗑️ |
| 001 123456789 | 123456789@ora.com | 🗑️ |
| 001 123456789 | 123456789@ora.com | 🗑️ |
| 001 123456789 | 123456789@ora.com | 🗑️ |
| 001 123456789 | 123456789@ora.com | 🗑️ |

Showing 1 to 7 of 7 entries ← →

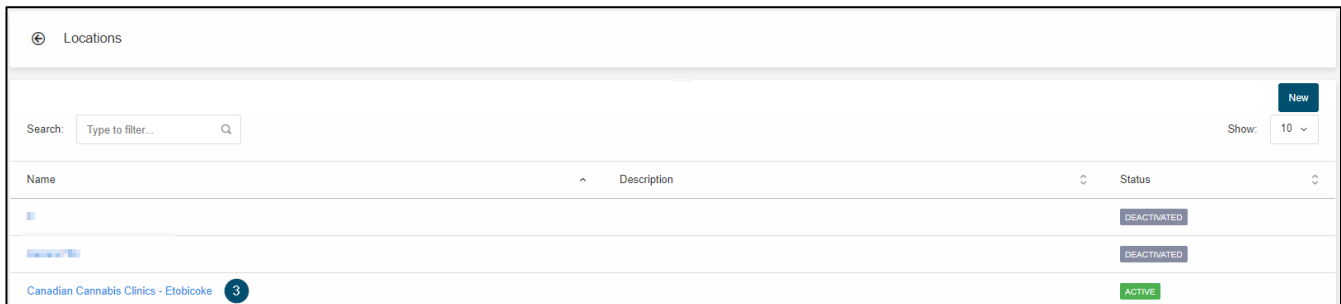
9. Click the trash bin icon to remove a provider from the location.
10. Click **“Add”** to add a provider to a location.



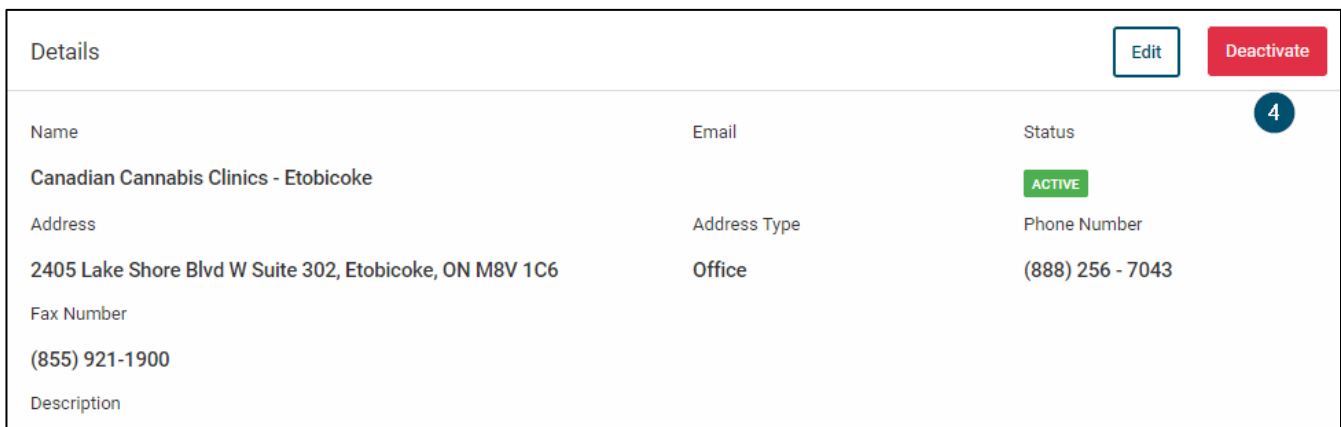
11. Select a provider from the dropdown list.
12. Click **“Confirm”**.

Deactivate a location

After loading the list of locations by following steps 1 and 2 from section 9.1



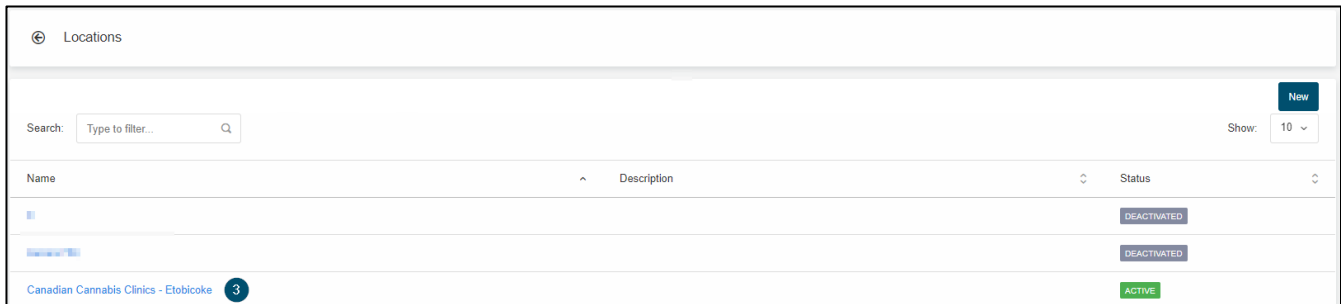
3. Click on a location name to edit



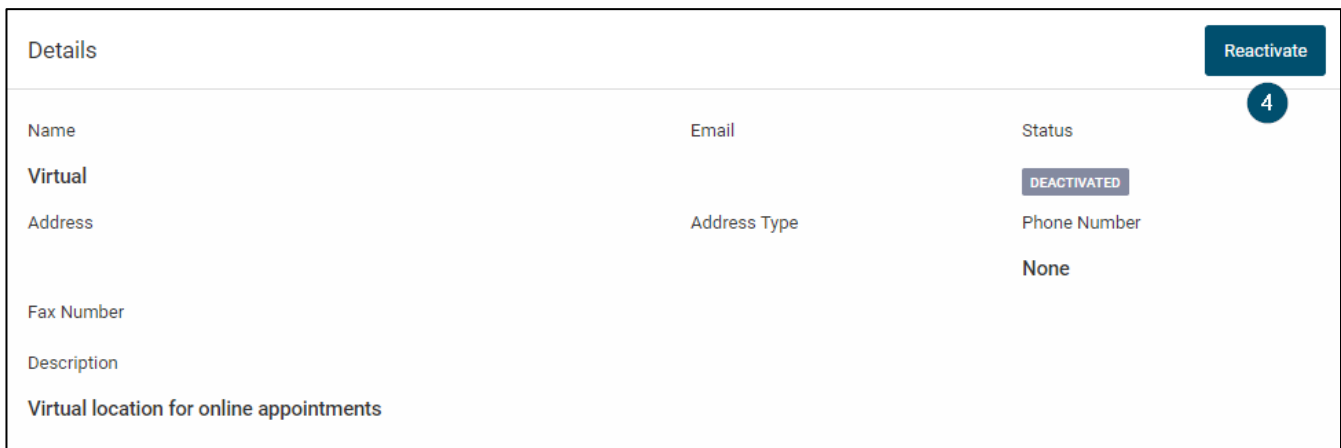
4. Click **“Deactivate”** to deactivate the location.

Activate a location

After loading the list of locations by following steps 1 and 2 from section 9.1



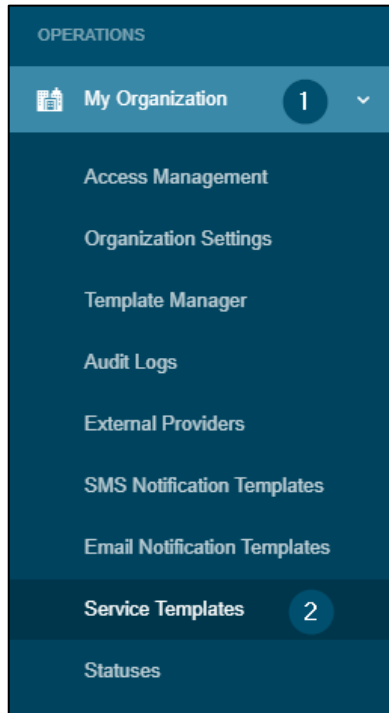
3. Click on a location name to edit.



4. Click "Reactivate" to reactivate the location.

8.2 Service Templates

Health Care Services need to be added, so that patients can be booked in for appointment type.



1. Click on **“My Organization”**.
2. Click **“Service Templates”**.

8.2.1 Adding a Service Template

The screenshot shows a table of service templates. At the top right, there is a "New" button with a notification badge "1". Below the button is a search bar with the placeholder text "Type to filter..." and a magnifying glass icon. To the right of the search bar is a "Show:" dropdown menu set to "25". The table has five columns: Name, Description, Colour, Created At, and Oscar ID. There are three rows of data.

| Name | Description | Colour | Created At | Oscar ID |
|------------------|--|---------|-----------------------|----------|
| Counselling Only | For all patients. Assessment with cannabis counsellor to ask questions and get advice. | #0CA2B3 | Oct 29, 2019 12:47 PM | |
| First Assessment | For new patient. Assessment with healthcare practitioner and cannabis counsellor. | #00A05D | Oct 29, 2019 12:47 PM | |
| Follow Up | For current patients. Assessment with healthcare practitioner and cannabis counsellor. | #F8B61E | Oct 29, 2019 12:48 PM | |

1. Click **“New”** to open the **“New Healthcare Service”** modal.

The screenshot shows a 'New Healthcare Service' form with the following fields and callouts:

- 2: Name (text input)
- 3: Service Type (dropdown menu)
- 4: Duration (in minutes) (text input)
- 5: Insurer (dropdown menu, currently showing 'OHIP')
- 6: Specialty Billing Code (dropdown menu)
- 7: Description (text area)
- 8: Appointment Preparation Instructions (text area)
- 9: Auto Approval Settings (checkbox, currently checked)
- 10: Appointment Buffer Hours (text input)
- 11: Type of Patient (dropdown menu, currently showing 'Both')
- 12: Colour (color picker, currently showing black)
- 13: Create Healthcare Service (button)

Buttons at the bottom include 'Close' and 'Create Healthcare Service'.

2. Type the name of the **healthcare service**.
3. Select a **service type** that relates to the healthcare service.
4. Type the **duration** of the healthcare service.
5. Select an **insurer** as applicable.
6. Select a **specialty billing code** as applicable.
7. Type a **description** of the healthcare service.
8. Type **Appointment Preparation Instructions**, if needed.
9. Check the “**Auto Approval Settings**” checkbox the appointment can be scheduled automatically without the approval of the provider.
10. Type in **Appointment Buffer Hours** as applicable.
 - a. **Appointment Buffer Hours** is defined as the amount of time between the current time and the first available timeslot that will appear when booking a new appointment.
11. Select one of the options to have it show on the “**Patient Sign Up**” form.
 - a. **New Patient** – will only show for new patient sign ups
 - b. **Existing Patient** – will only show for returning patient sign ups
 - c. **Both** – will only show for both new and returning patients
12. Click “**Create Healthcare Service**” to save the new healthcare service.
13. Assign a colour to the template

Note: The colour will be shown as a sidebar on appointments in the calendar



8.2.2 Editing a Service Template

| Name | Description | Colour | Created At | Oscar ID |
|--------------------|--|---------|-----------------------|----------|
| Counselling Only | For all patients. Assessment with cannabis counsellor to ask questions and get advice. | #9CA2B8 | Oct 29, 2019 12:47 PM | |
| First Assessment | For new patient. Assessment with healthcare practitioner and cannabis counsellor. | #00A050 | Oct 29, 2019 12:47 PM | |
| Follow Up 1 | For current patients. Assessment with healthcare practitioner and cannabis counsellor. | #FB8F1E | Oct 29, 2019 12:48 PM | |

1. Select the name of an **existing healthcare service**.

2 Edit Delete

Details

Name: Follow Up Duration (in minutes): 20

Insurer: OHIP Specialty Billing Code: Family Practice and Practice In General

Service Type: General Practice Appointment Buffer Hours: 0

Description: For current patients. Assessment with healthcare practitioner and cannabis counsellor.

Appointment Preparation Instructions:

Auto Approval Settings: Auto Accept Manual Accept Type of Patient: Existing Patient

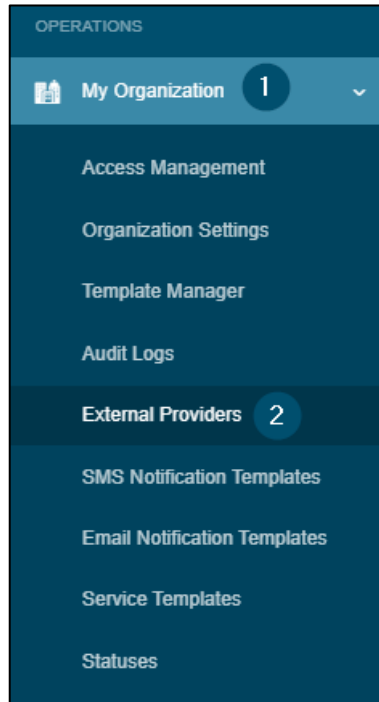
Colour: #FB8F1E

2. Click **“Edit”** and make changes to the healthcare service information.
3. **Save** your changes.

8.3 External Providers

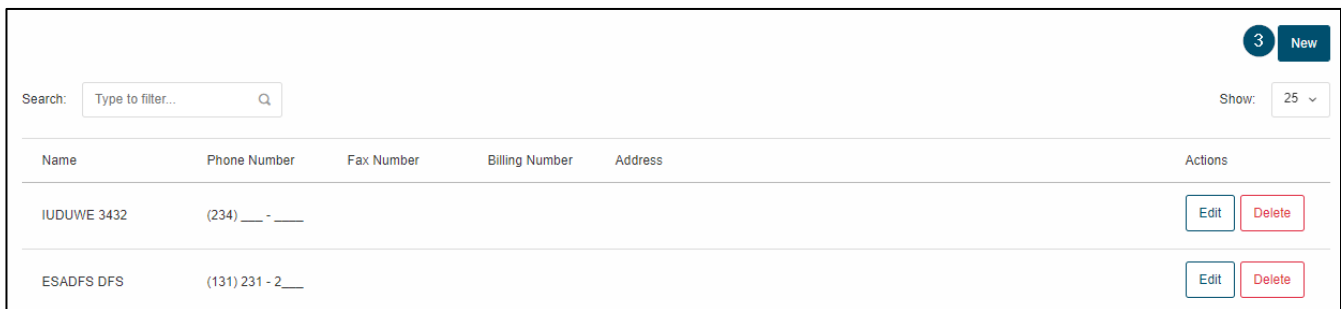
The External Providers section is used to manage all referring providers.

To access the list of referring providers:



1. Click **“My Organization”**.
2. Click **“External Providers”**.

8.3.1 Add a new provider



3. Click **“New”**.

Create External Provider

Salutation **4** First Name * Last Name *

Phone Number Fax Number Billing Number

Address * Apt/Suite/Floor

Close Save **5**

4. Complete all the referral provider's information.
5. Click "Save".

8.3.2 Edit an existing provider

| Name | Phone Number | Fax Number | Billing Number | Address | Actions |
|------|--------------|------------|----------------|---------|----------------------|
| | | | | | 3 Edit Delete |

1. Click "My Organization".
2. Click "External Providers".
3. Click "Edit".

Create External Provider

Salutation **4** First Name * Last Name *

Phone Number Fax Number Billing Number

Address * Apt/Suite/Floor

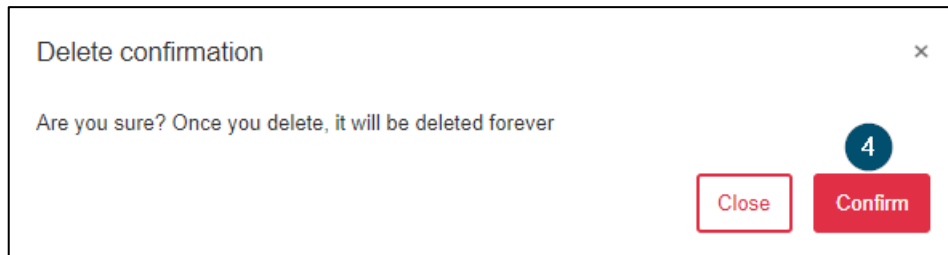
Close Save **5**

4. Modify provider information.
5. Click **“Save”**.

8.3.3 Delete an existing provider

| Name | Phone Number | Fax Number | Billing Number | Address | Actions |
|------|--------------|------------|----------------|---------|---|
| | | | | | 3 <input type="button" value="Edit"/> <input type="button" value="Delete"/> |

1. Click **“My Organization”**.
2. Click **“External Providers”**.
3. Click **“Delete”**.



4. Click **“Confirm”** to remove the referring provider from the system.

8.4 Physician Availability Setup

Physician availability can be set multiple ways within the system. The first is directly from the calendar page and the other is within the Template Manager.

Calendar Availability Method *Preferred Method*

Physician availability can be scheduled within the calendar.
To access availability from the calendar:

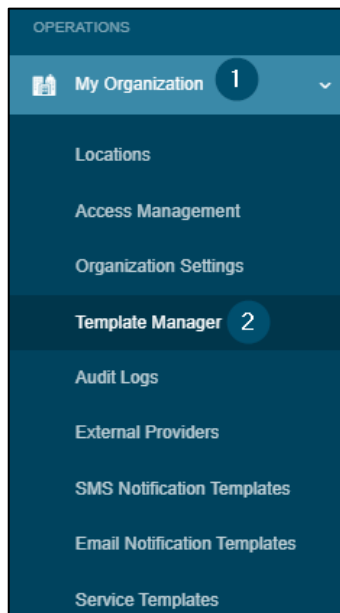
1. Click “**Calendar**”



2. Click “**View Availability**”

Template Manager Method

The Template Manager can be used to manage scheduling templates.
To access the list of schedule templates from the manager:

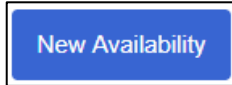


1. Click “**My Organization**”.
2. Click “**Template Manager**”.

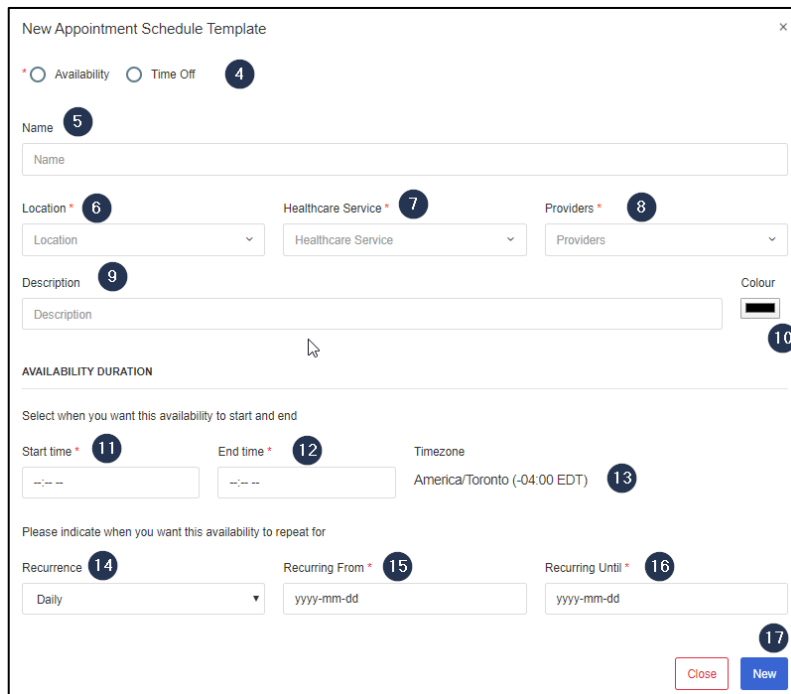
As a provider/admin, a schedule template can be created to indicate provider/counsellor availability and will show for.

8.4.1 Add a new schedule template

Calendar Availability Method



3. Click "New Availability".

A screenshot of a web form titled "New Appointment Schedule Template". The form includes several sections: 1. Radio buttons for "Availability" (selected) and "Time Off". 2. A "Name" text input field. 3. Three dropdown menus for "Location", "Healthcare Service", and "Providers". 4. A "Description" text input field and a "Colour" color picker. 5. An "AVAILABILITY DURATION" section with "Start time" and "End time" input fields, and a "Timezone" dropdown menu. 6. A "Please indicate when you want this availability to repeat for" section with "Recurrence" (dropdown), "Recurring From" (date input), and "Recurring Until" (date input) fields. 7. "Close" and "New" buttons at the bottom right. Numbered callouts (4-17) point to various elements in the form.

4. Select the **type of schedule template** to create:
 - a. **Availability** – Opens slots for provider availability
 - b. **Time Off** – Blocks time on the schedule for breaks or time off
5. Type a **Name** for the schedule template.
6. Select a **Location**.
7. Select a **Health Care Service** to which the schedule template will apply.
8. Select one or many **Provider(s)** to which the schedule template will apply.
9. Enter a **Description**.
10. Select a **Colour** that will identify the template on the Calendar.
11. Enter a **Start time**.
12. Enter an **End time**.
13. See what **Timezone** the template.
14. Enter a **Recurrence** as required:
 - c. None

- d. Daily
 - e. Weekly
 - f. Bi-weekly
15. Enter the start date of the template in the **Recurring From** field.
 16. Enter the end date of the template in the **Recurring Until** field.
 17. Click **New** to create the schedule template.

Template Manager Method

| Name | Description | Location | Colour | Created At |
|------------------|-------------|-----------|---------|----------------------|
| First Assessment | | Etobicoke | #FF9300 | Dec 16, 2019 2:42 PM |

3. Click **"New"**.

New Appointment Schedule Template x

Name Name

TIME / LOCATION

Start date yyyy-mm-dd Start time --:-- End date yyyy-mm-dd End time --:--

Timezone applied: America/Toronto (-05:00 EST) Location * Location Providers * Dr. ItsAdra1 UAT x

Recurrence None

DETAILS

Healthcare Service * Healthcare Service Colour █

Description Description

Close New

4. Enter a **Name** for the schedule template.
5. Enter a **Start date**.
6. Enter a **Start time**.
7. Enter an **End date**.
8. Enter an **End time**.
9. Enter a **Location**.

10. Enter a **Provider** (to which the schedule template will apply).
11. Enter a **Recurrence** as required.
12. Select a **Healthcare Service** (to which this schedule template will apply).
13. Select a **Color** that will identify the template on the Calendar.
14. Enter a **Description**.
15. Click **New** to create the schedule template.

Note: Start date/time and end date/time should be within the same day and then **Recurrence** should be used to identify the recurrence of the schedule template.

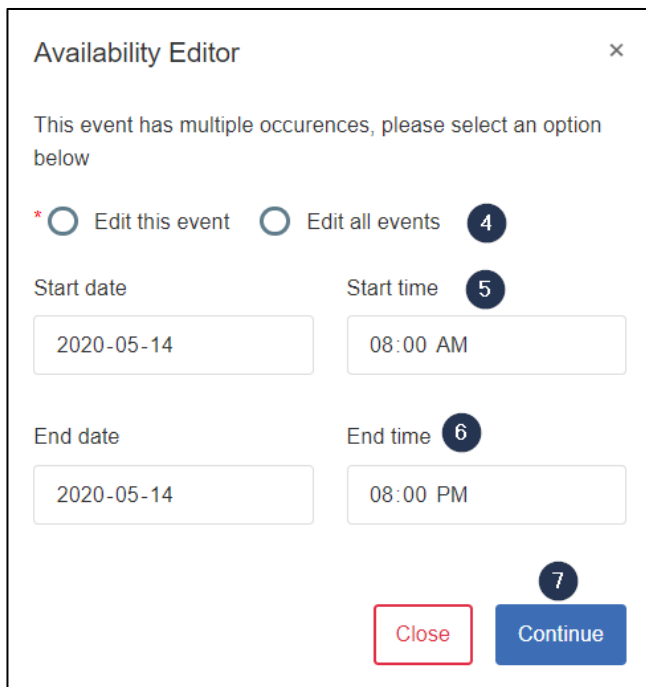
8.4.2 Edit an existing schedule template

Calendar Availability Method

1. Click “**Calendar**”



2. Click “**View Availability**”
3. Click on the availability block to edit



Availability Editor

This event has multiple occurrences, please select an option below

* Edit this event Edit all events 4

Start date 2020-05-14 Start time 08:00 AM 5

End date 2020-05-14 End time 08:00 PM 6

Close Continue 7

4. Select if you would like to “**Edit this event**” or “**Edit all events**”
5. Modify the “**Start date**” or “**Start time**” (if applicable)
6. Modify the “**End date**” or “**End time**” (if applicable)
7. Click “**Continue**” (if “**Edit all event**” is selected please proceed to step 8)

Details

* Availability Time Off

Name
Wednesday, Thursday Availability

Location * Virtual x v Healthcare Service * None selected v Providers * All Providers v

Description Description Colour

AVAILABILITY DURATION

Select when you want this availability to start and end

Start time * 08:00 AM End time * 04:00 PM Timezone America/Toronto (-04:00 EDT)

Please indicate when you want this availability to repeat for

Recurrence Weekly v Recurring From * 2020-04-27 Recurring Until * 2020-06-26

S M T W T F S

8
Update

8. Edit the template as needed and then click **“Update”**.

Template Manager Method

1. Click **“My Organization”**.
2. Click **“Template Manager”**.

| Name | Description | Location | Colour | Created At |
|---------------------------------------|-------------|---------------------------------------|---------|-----------------------|
| 3 CCC Etobicoke - Counselling Only | | Canadian Cannabis Clinics - Etobicoke | #409090 | Oct 29, 2019 4:42 PM |
| CCC Etobicoke - Initial Appointment | | Canadian Cannabis Clinics - Etobicoke | #686868 | Nov 12, 2019 12:11 PM |
| Holiday Hours | | Canadian Cannabis Clinics - Etobicoke | #7A81FF | Nov 15, 2019 3:41 PM |
| CCC Etobicoke - Follow Up Appointment | | Canadian Cannabis Clinics - Etobicoke | #0080FF | Oct 29, 2019 4:41 PM |

3. Click on a schedule template name to edit a template.

Details Edit Delete

Name

Holiday Hours

TIME / LOCATION

Start time End time

Nov 15, 2019 9:00 AM Nov 15, 2019 3:00 PM

Timezone applied Provider Location

America/Toronto (-05:00 EST) M. Dave Chaudhary Canadian Cannabis Clinics - Etobicoke

Recurrence Recurring Until

4. Click **“Edit”**.

Details Cancel Save

Name

Holiday Hours

TIME / LOCATION

Start date Start time End date End time

2019-11-15 09:00 AM 2019-11-15 03:00 PM

Timezone applied Providers Location

America/Toronto (-05:00 EST) M. Dave Chaudhary x Canadian Cannabis Clinics - Etob... x

Recurrence Recurring Until

Daily 2025-11-28

DETAILS

Healthcare Service Colour

First Assessment Blue

Description

Description

5. Edit the template as needed and then click **“Save”**.

8.4.3 Delete an existing schedule template

1. Click **“My Organization”**.
2. Click **“Template Manager”**.

| Name | Description | Location | Colour | Created At |
|------------------|-------------|-----------|---------|----------------------|
| First Assessment | | Etobicoke | #FF9300 | Dec 16, 2019 2:42 PM |
| Followup | | Etobicoke | #945200 | Dec 16, 2019 2:43 PM |

3. Click on a schedule template name to edit a template.

Details Edit Delete

Name
CCC Etobicoke - Counselling Only

TIME / LOCATION

Start time
Oct 29, 2019 8:30 AM

End time
Oct 29, 2019 4:30 PM

Timezone applied
America/Toronto (-05:00 EST)

Provider
Dr. ItsAdra UAT

Location
Canadian Cannabis Clinics - Etobicoke

Recurrence
Weekly

Recurring Until
Dec 26, 2025

S M T W T F S

DETAILS

Healthcare Service
Counselling Only

Colour
#408080

Description

4. Click "Delete".

Delete confirmation ×

Are you sure? Once you delete, it will be deleted forever

Close Confirm

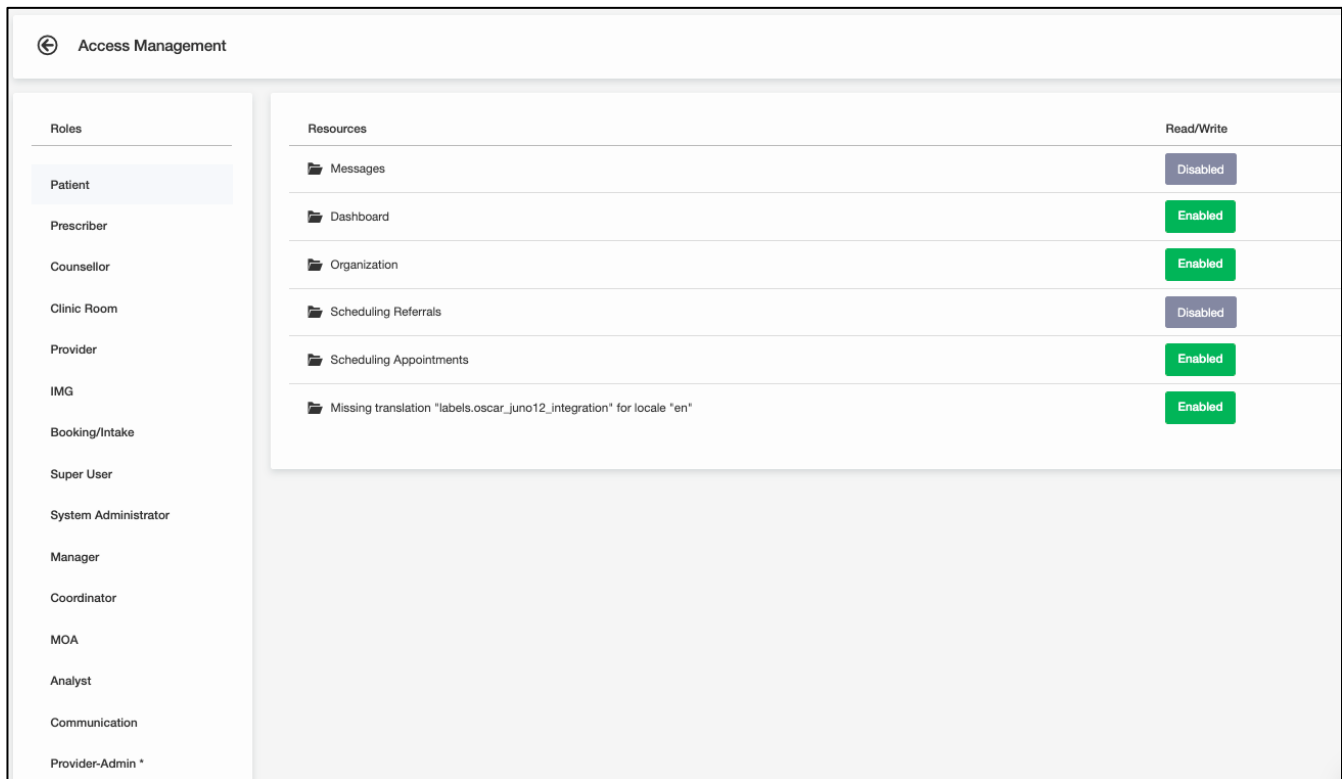
5. Click "Confirm" to delete the schedule template.

8.5 Access Management

8.5.1 View user roles

System administrators have access to modify permissions to existing user roles.

1. Click on **My Organization**
2. Click on **Access Management**



The screenshot displays the 'Access Management' interface. On the left, there is a sidebar with a list of user roles. The main area shows a table with columns for 'Resources' and 'Read/Write' permissions. The 'Read/Write' column contains buttons that are either 'Enabled' (green) or 'Disabled' (grey).

| Roles | Resources | Read/Write |
|----------------------|---|------------|
| Patient | Messages | Disabled |
| Prescriber | Dashboard | Enabled |
| Counsellor | Organization | Enabled |
| Clinic Room | Scheduling Referrals | Disabled |
| Provider | Scheduling Appointments | Enabled |
| IMG | Missing translation "labels.oscar_juno12_integration" for locale "en" | Enabled |
| Booking/Intake | | |
| Super User | | |
| System Administrator | | |
| Manager | | |
| Coordinator | | |
| MOA | | |
| Analyst | | |
| Communication | | |
| Provider-Admin * | | |

3. See the list of **user roles** and the **permissions** for each **Resource**.

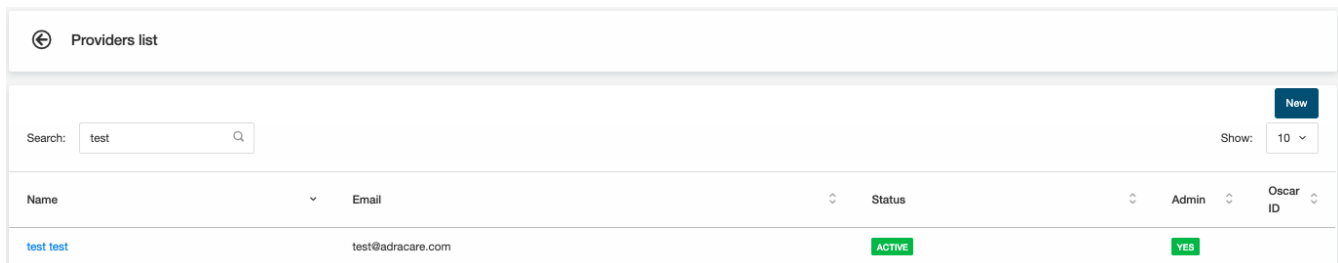
8.5.2 Edit user roles



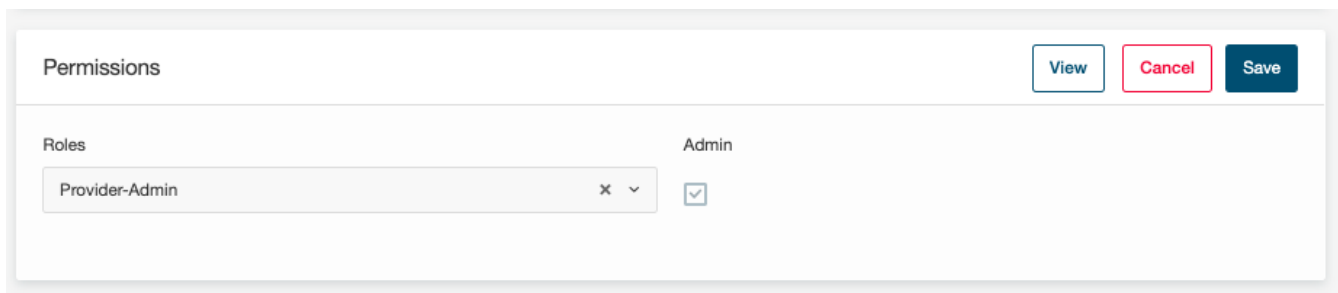
1. On the left panel, select one of the **user roles** to which you want to make changes.
2. Click on either “**Enabled**” or “**Disabled**” in the Read/Write column to activate or deactivate the resource for that user role. All changes automatically save.

8.5.3 Assigning a user role to a provider

System administrators can assign a user role to an existing “Provider” user.



1. Under “Admin”, click **Providers**.
2. Click the provider’s name to open their **Account Settings**.
3. Under the **Permissions** section and click on the **Edit** button.



4. Select a **role** in the dropdown to assign the user.
5. Click **Save** to save the changes to the profile.

8.6 Questionnaire Manager

Questionnaire Manager is a section to configure questionnaire templates that can be sent automatically to a patient or opened by a provider to complete for a patient.

Note: Before creating a new template, you will need to build a survey at [SurveyJS Builder](#). Build a survey using Survey Designer and, once done, you can copy and paste the JSON into the Questionnaire Manager.

8.6.1 Create a new questionnaire template

1. Click **“My Organization”**.
2. Click **“Questionnaire Manager”**.
3. Click the **“New Questionnaire Template”** button.
4. A modal will appear where you need to select if you want to create new questionnaire (from scratch) or select from an existing questionnaire.
5. Click on **“Create New Questionnaire”**.
6. Enter a **title** for the Questionnaire template.
7. Go to the **JSON Editor** in **SurveyJS Builder** and copy the JSON generated from the survey.
8. In the large textbox, please paste the JSON you generated from the [SurveyJS builder](#).
9. In the **Healthcare Service field**, select one or more healthcare services.
If any of those healthcare services are selected in a newly created appointment, a questionnaire will be included in the appointment notification.
10. Click **“Create New Questionnaire”** and the template will be saved as a draft.
11. Click the **“Publish”** once you are ready for users to start using the questionnaire template.

8.6.2 Setup Questionnaire’s Document Template

1. Click **“My Organization”**.
2. Click **“Questionnaire Manager”**.
3. Among the existing questionnaire(s) listed, click on **“Edit Document Template”**.
4. Enter the text that will appear when you try importing the completed questionnaire. When you want to import responses entered in on the completed questionnaire, you need to know the name of the field. The field has to follow the format to make sure the responses are populated:
 - Two open curly brackets {{
 - Questionnaire field name
 - Two closed curly brackets }}
5. Click **“Save”**.

8.6.3 Archive a questionnaire template

Archiving questionnaire templates will inactivate them and will not be accessible for patients or providers.

1. Click **“My Organization”**.
2. Click **“Questionnaire Manager”**.
3. Click the **“Archive”** button.

8.7 Notification Template Setup

8.7.1 SMS Notifications

Administrators can change the notification text for SMS notifications.

1. Click on **“My Organization”**.
2. Click **“SMS Notification Templates”**.
3. Click **“New Template”**.

Adding SMS Notifications

SMS Appointment Schedule

The screenshot shows a 'New Notification Template' form with the following fields and options:

- Name**: A text input field with the placeholder 'Name'.
- Status**: A toggle switch currently set to 'OFF'.
- Description**: A large text area with the placeholder 'Description'.
- Type**: Three radio button options: 'SMS Appointment Schedule' (selected), 'SMS Appointment Reminder', and 'SMS Appointment Check-in'.
- SMS APPOINTMENT SCHEDULE**: A section header.
- Language**: A dropdown menu currently set to 'English'. A note above it states: '* The language can be selected after you create the Notification Template with your default locale'.
- Use default SMS**: A checkbox that is currently unchecked.
- SMS appointment schedule message**: A large text area with the placeholder 'SMS appointment schedule message'.
- Buttons**: 'Close' (red outline) and 'Create Notification Template' (dark blue).

4. Type a **name** for the new template.
5. Change the **status** to **“On”**.
6. Type a description of the notification.
7. Select **“SMS Appointment Schedule”**.
8. Select **“Use default SMS”** to use the built-in SMS message for the patient.
9. If **“Use default SMS”** is not selected, type the SMS message for the patient.
10. Click **“Create Notification Template”**.

SMS Appointment Reminder

The screenshot shows a 'New Notification Template' form. It includes a 'Name' input field, a 'Status' toggle set to 'OFF', and a 'Description' text area. The 'Type' section has three radio buttons: 'SMS Appointment Schedule', 'SMS Appointment Reminder' (which is selected), and 'SMS Appointment Check-in'. Below this, there is a section for 'SMS APPOINTMENT REMINDER' with a language dropdown set to 'English' and a note: '* The language can be selected after you create the Notification Template with your default locale'. There are four buttons for time intervals: '3 Days', '1 Days', '12 Hours', and '6 Hours'. A 'Use default SMS' checkbox is also present. At the bottom, there is a text area for the 'SMS appointment reminder message' and two buttons: 'Close' and 'Create Notification Template'.

11. Type a **name** for the new template.
12. Change the **status** to “**On**”.
13. Type a **description** of the notification.
14. Select “**SMS Appointment Reminder**”.
15. Select the **length of time prior the appointment** when the message will be sent.
16. Select “**Use default SMS**” to use the built-in SMS message for the patient.
17. If “Use default SMS” is not selected, type the **SMS message** for the patient.
18. Click “**Create Notification Template**”.

SMS Appointment Check-in

The screenshot shows a 'New Notification Template' form. It includes a 'Name' field, a 'Status' toggle (currently 'OFF'), a 'Description' text area, and a 'Type' dropdown menu with three options: 'SMS Appointment Schedule', 'SMS Appointment Reminder', and 'SMS Appointment Check-in' (which is selected). Below the type selection, there is a section for 'SMS APPOINTMENT CHECK-IN' with a language dropdown set to 'English' and a note: '* The language can be selected after you create the Notification Template with your default locale'. There are four buttons for time intervals: '60 Minutes', '45 Minutes', '30 Minutes', and '15 Minutes'. A 'Use default SMS' checkbox is also present. At the bottom, there is a 'SMS appointment check-in message' text area and two buttons: 'Close' and 'Create Notification Template'.

19. Type a **name** for the new template.
20. Change the **status** to “**On**”.
21. Type a **description** of the notification.
22. Select “**SMS Appointment Check-In**”.
23. Select the **length of time prior the appointment** when the message will be sent.
24. Select “Use default SMS” to use the built-in SMS message for the patient.
25. If “Use default SMS” is not selected, type the SMS message for the patient.
26. Click “**Create Notification Template**”.

Editing SMS Notifications

| Name | Description | Notification Type | Notification Frequency | Enabled |
|--|-------------|-------------------|------------------------|--|
| 1 Hour Reminder 2 | | check_in | 60 Minutes | ACTIVE Deactivate 1 |
| 1 Day Reminder | | reminder | 1 Days | ACTIVE Deactivate |

1. **Activate or Deactivate** the SMS Notification Template.
2. Click a **template name** to edit its contents.

3. **Rename** the template.
4. **Activate or Deactivate** the Email Template Notification.
5. Type in a **description**.
6. Change the **type of SMS notification**.
7. Select the **length of time prior the appointment** when the message will be sent.
8. Select "Use default SMS" to use the built-in SMS message for the patient.
9. If "Use default SMS" is not selected, type the SMS message for the patient.
10. **Save** the changes and close out the window.

8.7.2 Email Notification

Administrators can change the notification text for the 6 default emails:

- Accept
- Cancellation
- Confirmation

- Check-In
- Reminder
- Reschedule

1. Click on **“My Organization”**.
2. Click **“Email Notification Templates”**.

| Name | Description | Email Type | Frequency | Enabled |
|--------------|-------------|--------------|-----------|-------------------|
| Reschedule | | reschedule | | ACTIVE Deactivate |
| Reminder | | reminder | | ACTIVE Deactivate |
| Confirmation | | confirmation | | ACTIVE Deactivate |
| Cancellation | | cancellation | | ACTIVE Deactivate |
| Accept | | accept | | ACTIVE Deactivate |

3. **Activate or Deactivate** a Email Notification Template.
4. Click a **template name** to edit its contents.

Email Notification Template Details

Name * Status ACTIVE Deactivate

Email Type Description Frequency 3 Days 1 Days 12 Hours 6 Hours

EMAIL CONTENT

Enter the content that you would like to feature in this email notification using the tags on the left to add dynamic values to things like name, appointment time, and location.

English

Tag Wordbank

- appointment_address
- appointment_time
- appointment_url
- brand
- check_in_minutes
- current_user
- dial_in_code
- direct_questionnaire_url
- direct_video_url

Rich Text Editor:

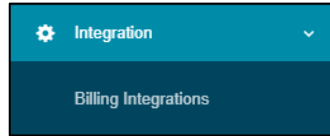
This is a friendly reminder of your appointment with {{provider_name}} on {{appointment_time}}. Please confirm your appointment below.
 If you have any questions, just let us know.
 For clinic appointments, please email [tag]; For virtual appointments, please email [tag]

5. **Rename** the template.
6. **Activate or Deactivate** the Email Notification Template.
7. Select the **email type**.
8. Type in a **description**.
9. Select the **language** to which the template applies.
10. Type the **body** of the email template.
11. **Save** the changes and **close** out the window.

Note: Use the **Tag Wordbank** to fully customize your templates with context-based tags. These tags will populate based on the patient, appointment, provider, and organization.

8.8 Billing Integration

The platform can be integrated with third-party billing medical software.



1. Click on **Integration**.
2. Click on **Billing Integrations**.



8.8.1 ClinicAid

3. Click the **New** button.

 A screenshot of a dialog box titled 'Add Billing Integration Config'. It contains several input fields: 'Name' and 'Url' (text boxes), 'Username' and 'Password' (text boxes), 'Integration Service' (a dropdown menu with 'ClinicAid - ON' selected), and 'Locations' (a dropdown menu with 'None selected'). At the bottom right, there are 'Close' and 'Create' buttons.

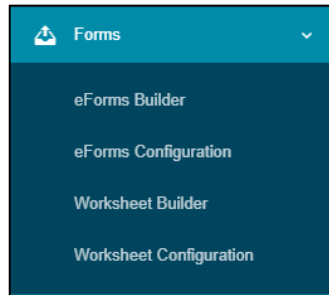
4. Input your ClinicAid information:
 - **Name:** The name this billing integration configuration
 - **URL:** The API url for the billing software to which you need to connect
 - **Username and Password:** the credentials to the billing platform
 - **Integration service:** select the billing software with which you want to integrate
 - **Location:** select the location(s) you want this integration to work with.
5. Click **Create** to save the integration.

Note: Access ClinicAid directly from Ora by clicking **Billing> Clinic Aid Ontario**

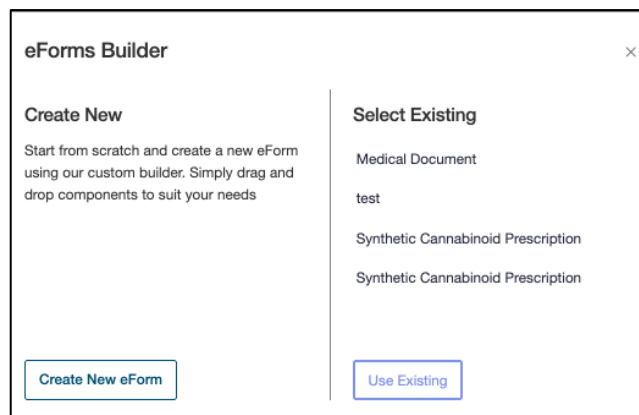
ClinicAid - Ontario

8.9 eForms Builder

The eForms Builder lets you create forms to collect structured data entered in by the user.



1. Click on **Forms**
2. Click on “**eForms Builder**”.



3. The modal will appear asking you if you want to start from scratch or use an existing eform to build a new eform.
 - a. **New:** Press the “**Create new eform**” button
 - b. **Existing:** Select the **form name** that you want to edit and click the “**Use Existing**” button

4. Enter the name you want for the eForm in the “**eForm Template Title**” textbox.
5. Click one of the fields from the left panel (or drag them from the left to the right) to add it to the eForm
 - **Autocomplete**: Create preset options (like a dropdown), but the end user can type in a few characters which narrows the list of options.
 - **Button**: Create a button to select a preset option
 - **Checkbox Group**: Create a selectable list of options by using checkboxes.
 - **Date Field**: Input date values
 - **File Upload**: Upload a file to the eForm
 - **Header**: Insert titles in your eForm
 - **Hidden Input**: Create a hidden field on the eForm with a preset value that the end user cannot see or update.
 - **Number**: Input a number value within a preset range
 - **Paragraph**: Insert preset text that can be used as instructions or comments to help guide the end user
 - **Radio Group**: Create a preset list of options that can be selected by clicking on a radio button.
 - **Select**: Create a preset list of options to select from a dropdown
 - **Text Field**: Create a single-line text box that lets an end user enter free-text
 - **Text Area**: Create a multi-line text box that lets an end user enter free-text
6. To change the order of fields, drag up or down the fields.
7. Click the **Preview** button to see how the eForm would look like for an end user.
8. To start again, you can click the **Clear** button.
9. Press **Save** once the eForm is completed. Once saved, it will now be active and available for users with access.