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.

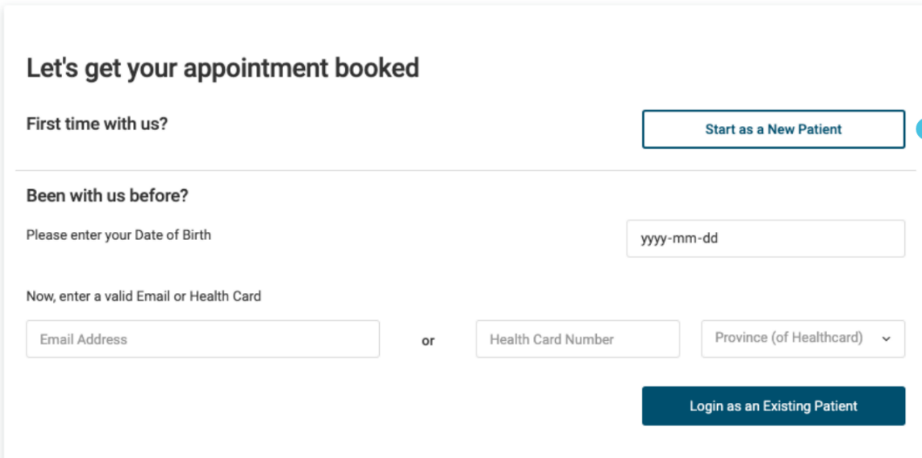
Apple mobile devices (iOS 11+)

- Apple iPhones with Safari

2 Patient Self-Service

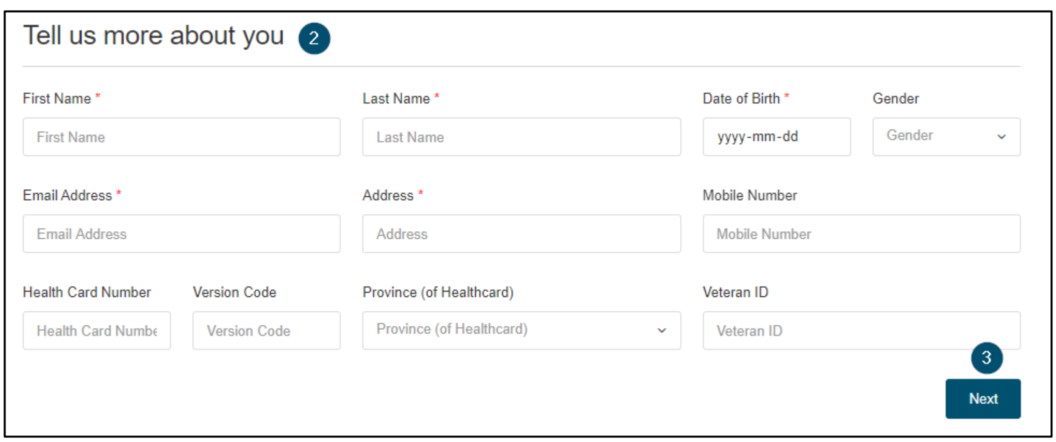
2.1 Creating a New Patient

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



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

2.1.1 Patient Demographics



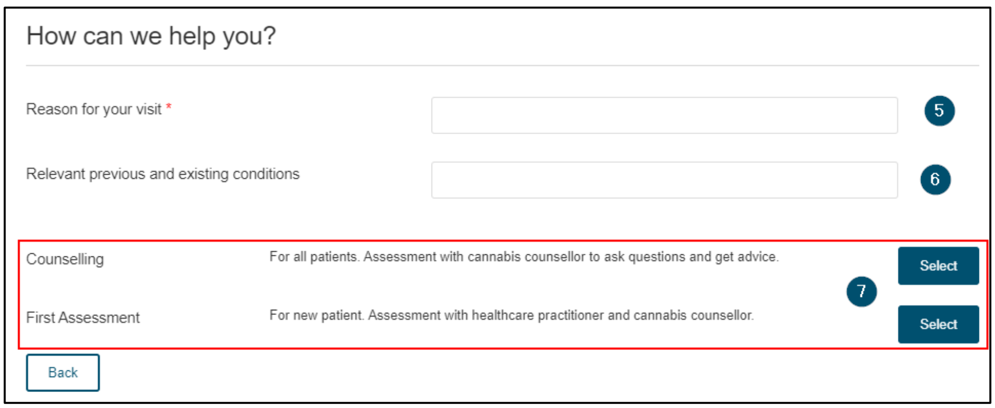
2. Fill out all relevant **patient information** and ensure that all mandatory fields are complete.

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

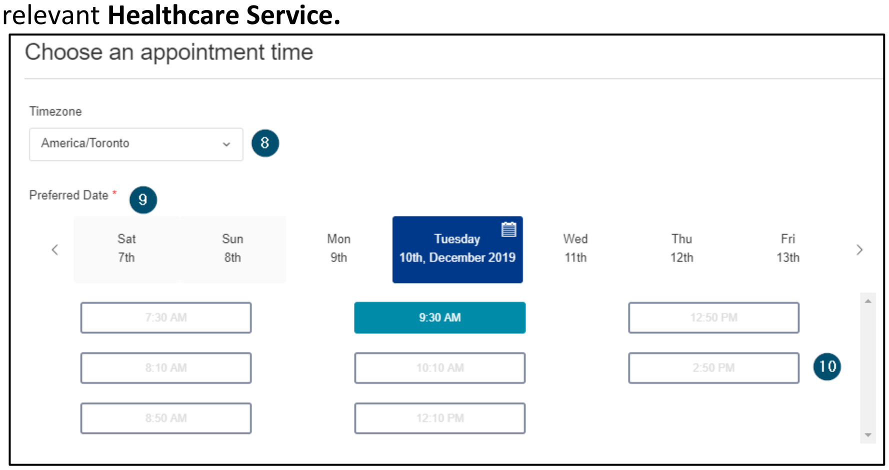
3. Click “**Next**” to go to the next section.

2.1.2 Scheduling an appointment

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



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

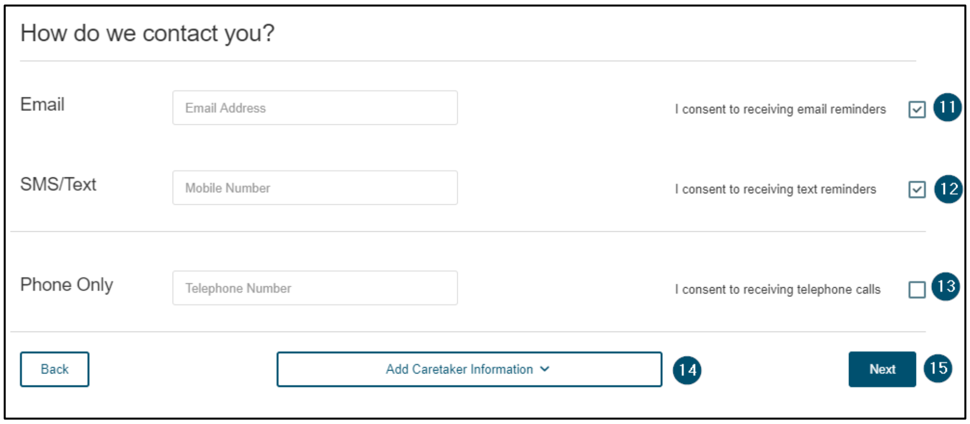


Note: Healthcare Services can vary between clinic locations.

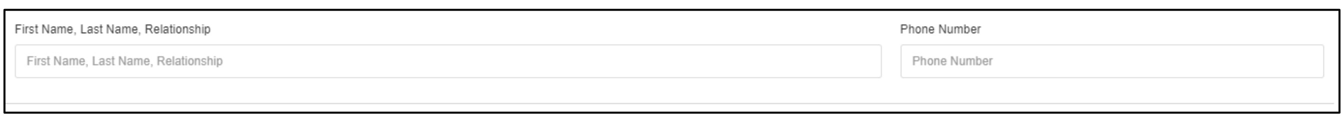
8. Select the appropriate **time zone** for the patient's visit.
9. Select a **date.**
10. Select an available **time slot.**

2.1.3 Patient Contact Information

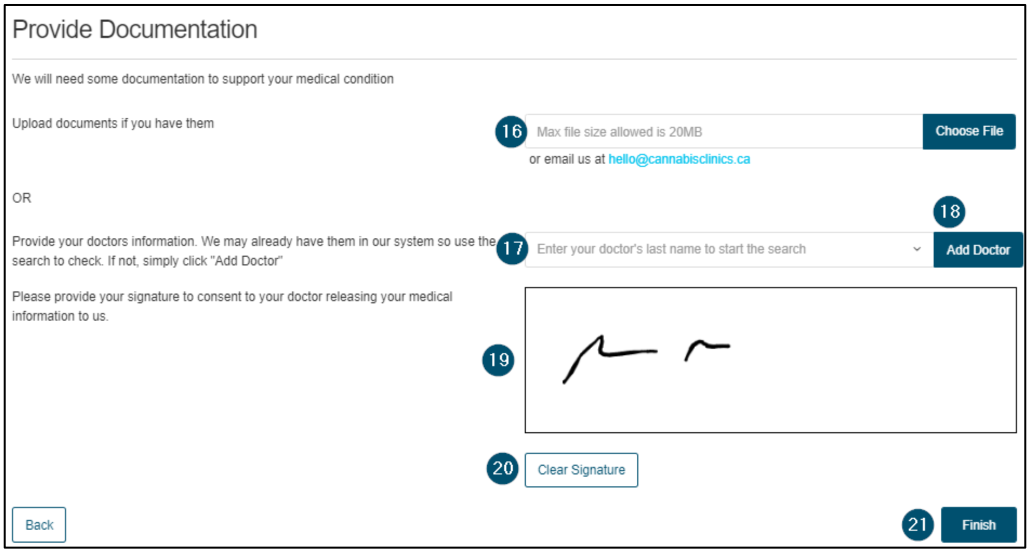
Patients can consent to be contacted by either email and/or text, or phone only.



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.

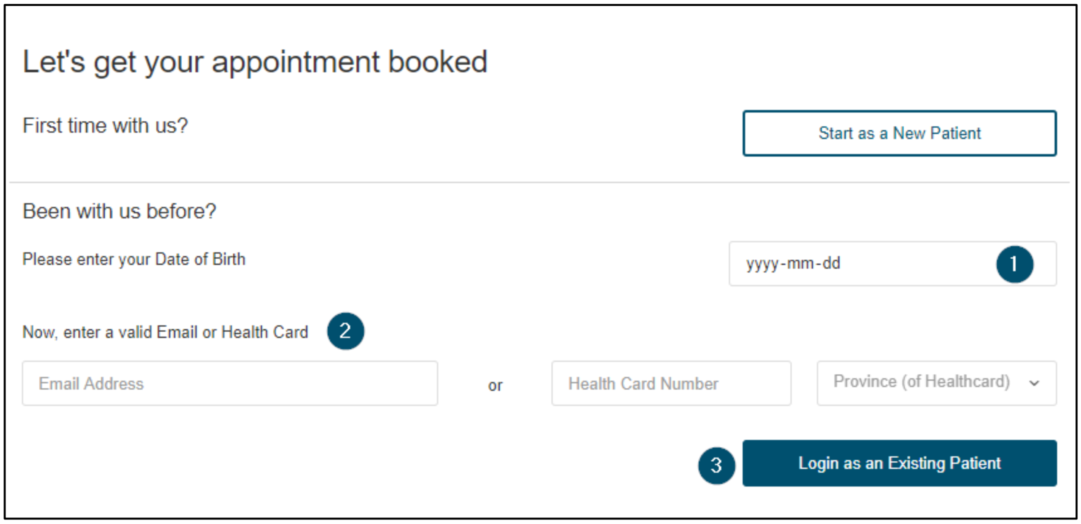


16. Click “Choose File” and upload an **attachment** as applicable (max file size is 20 MB) or email all relevant documents to hello@cannabisclinics.ca.
17. Search for the patient’s **doctor’s profile** by their last name.
18. If the **doctor’s profile** cannot be found, click “Add Doctor” and the following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

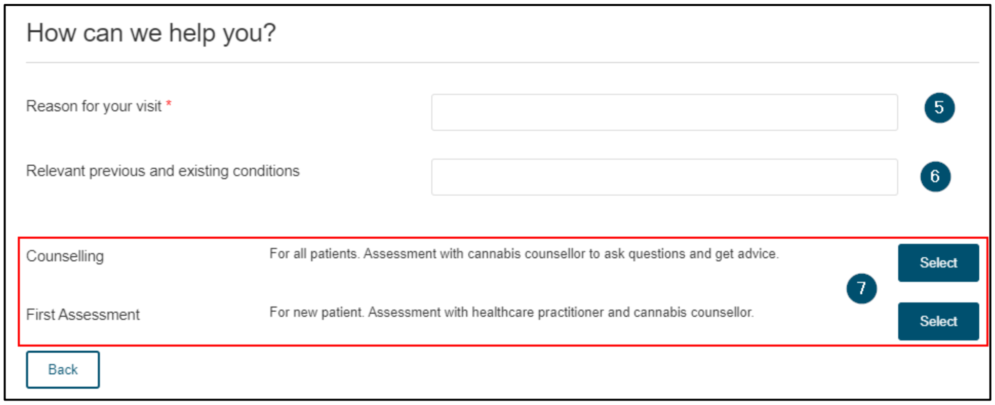
Patients will select whether they are a new or returning patient on the Patient Sign Up form to book their appointment.Hi



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.

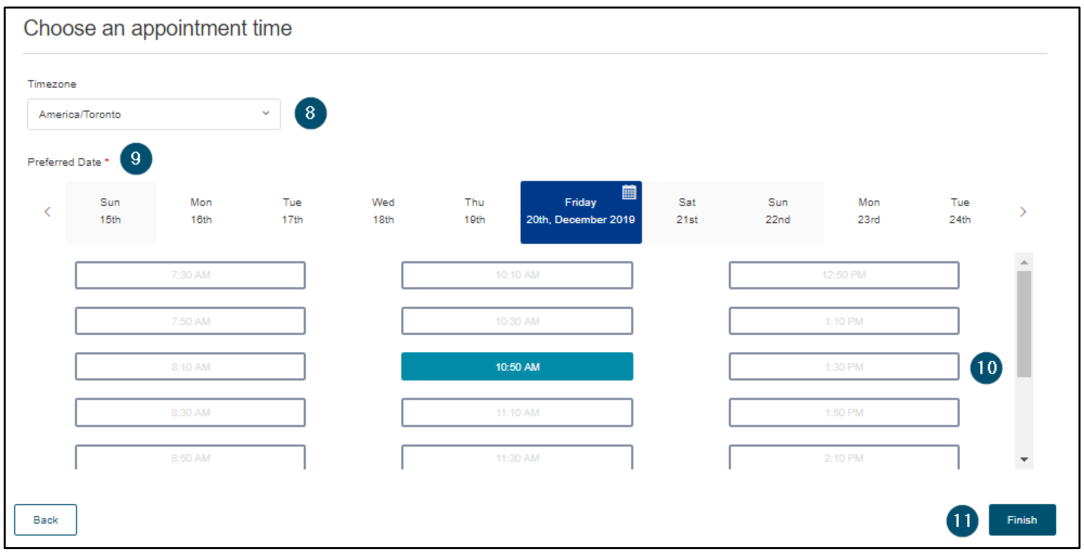
2.2.1 Scheduling an appointment

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



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.

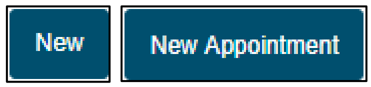


8. Select the appropriate **time zone** for the appointment.
9. Select a **date**.
10. Select an available **time slot**.
11. Click "Finish" to schedule the appointment.

3 Scheduling

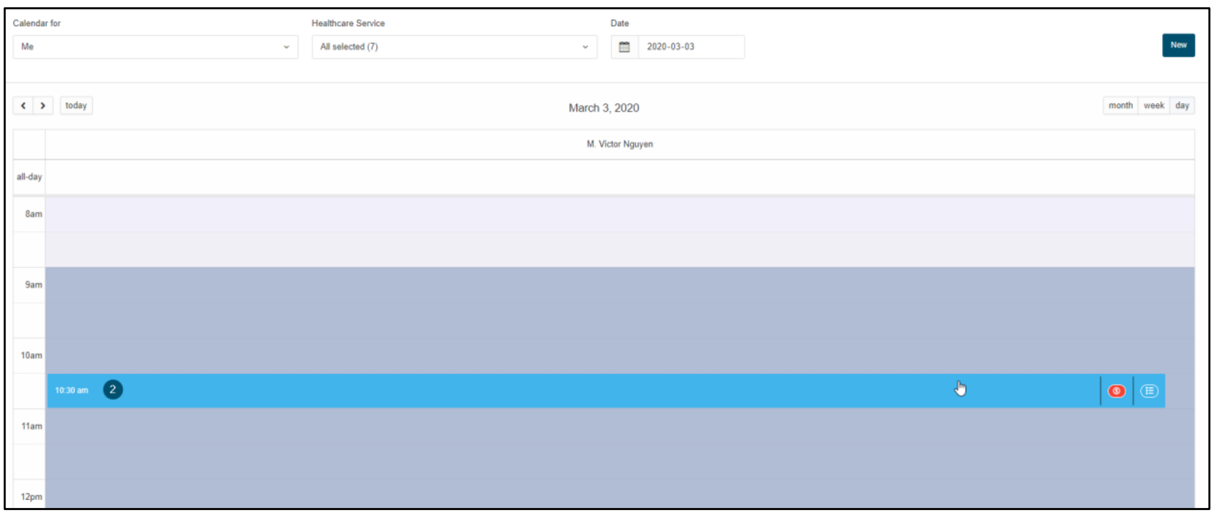
3.1 Scheduling an Appointment

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

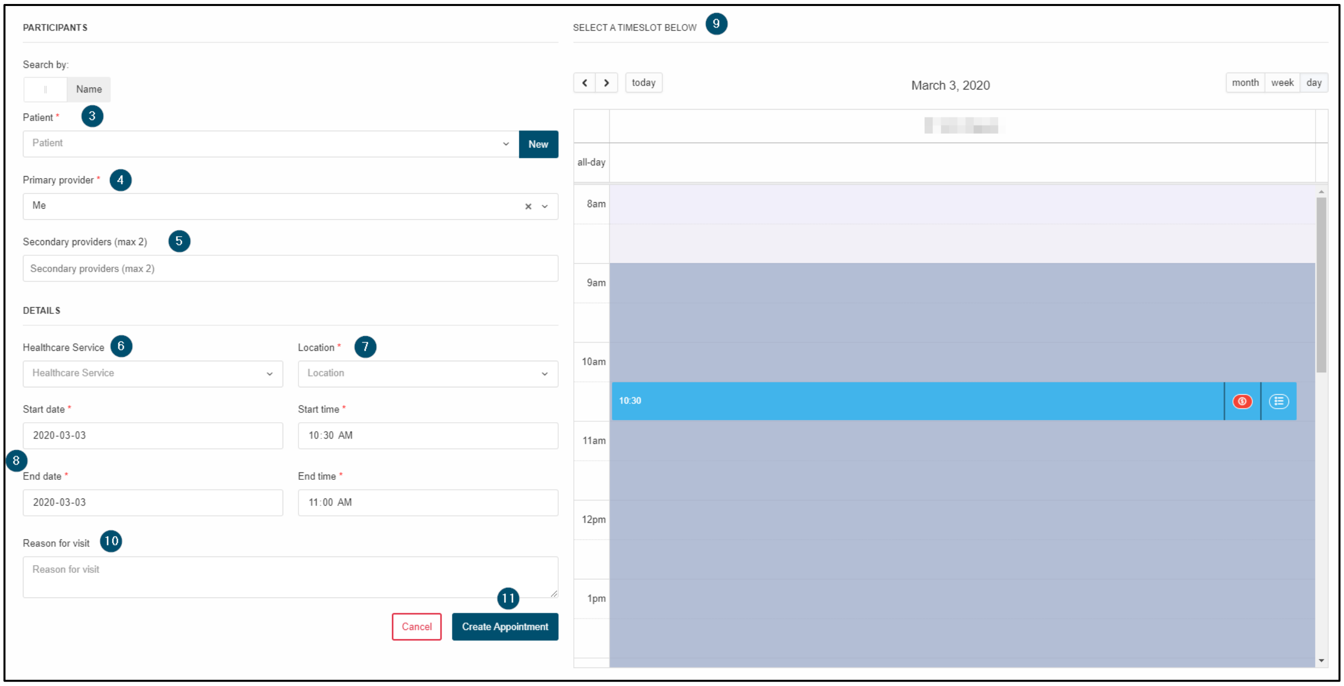


1. Click the "**New**" button on **Calendar** or "**New Appointment**" on **Appointments**

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:

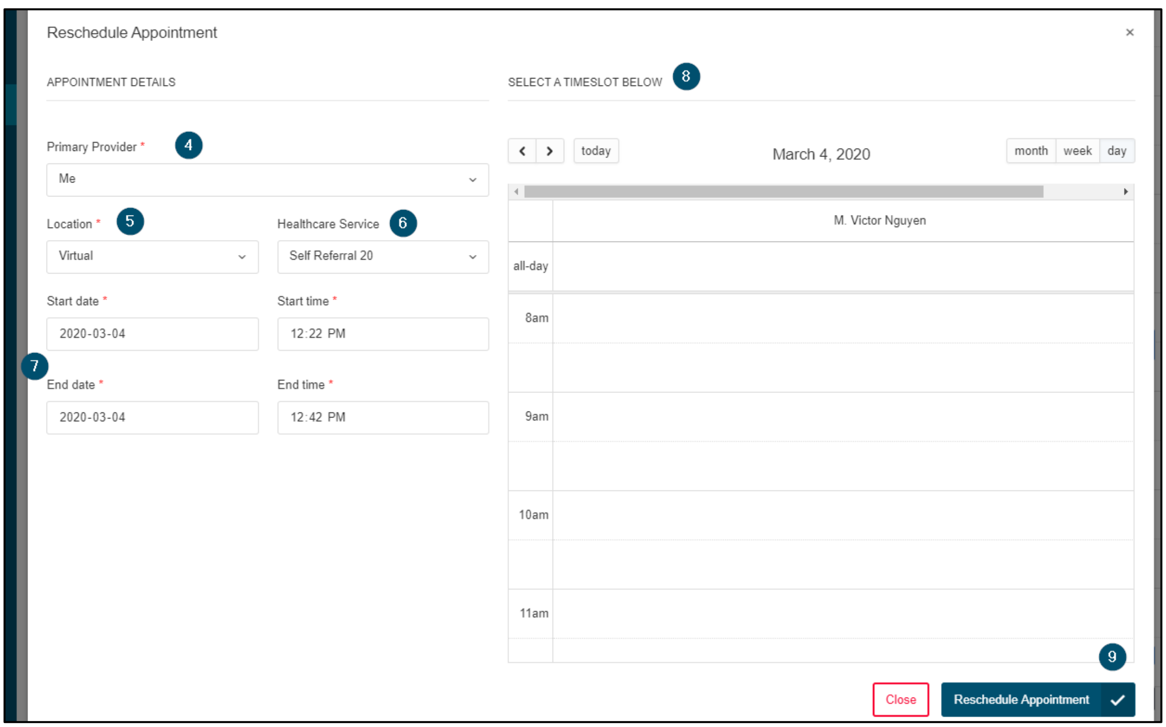
- On the Calendar
- On the Appointment Details page of the appointment

3.2.1 Rescheduling from the Calendar

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

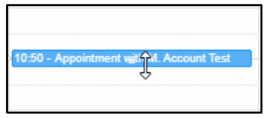
Move an appointment

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

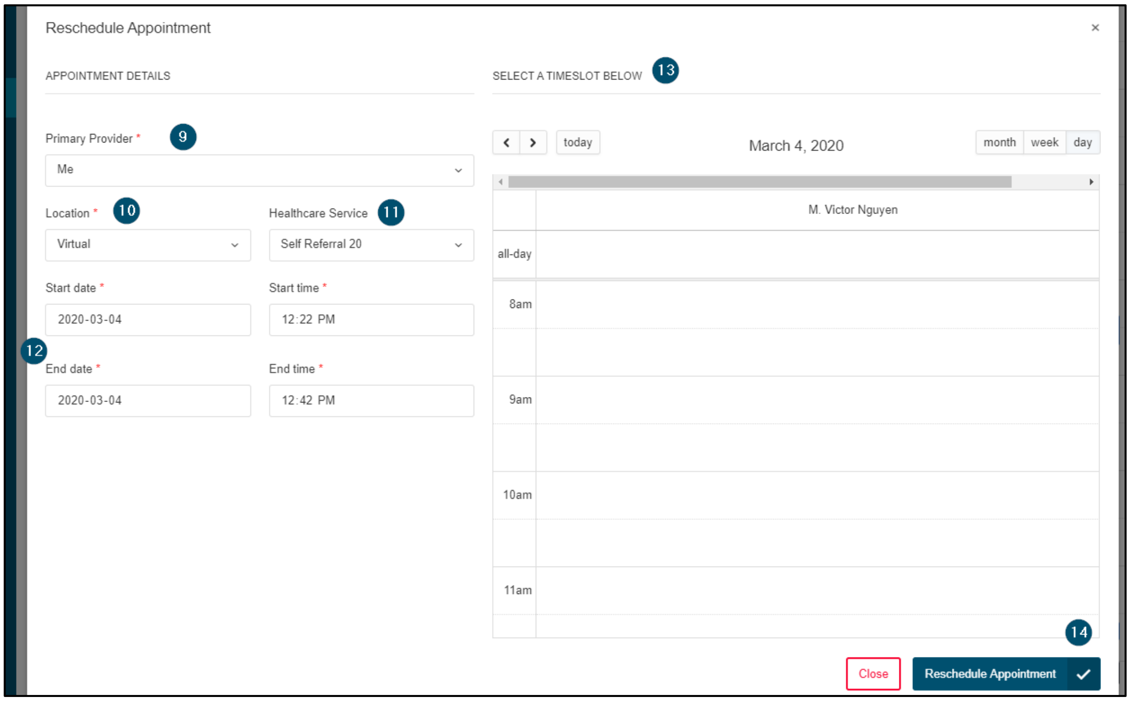


4. If applicable, change the **Primary Provider** of the appointment.
5. If applicable, change the **Location** of the appointment.
6. If applicable, change the **Healthcare Service** of the appointment.
7. Confirm the **date and time** of the appointment.
8. **Time** can also be adjusted from the Calendar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

Extend the appointment

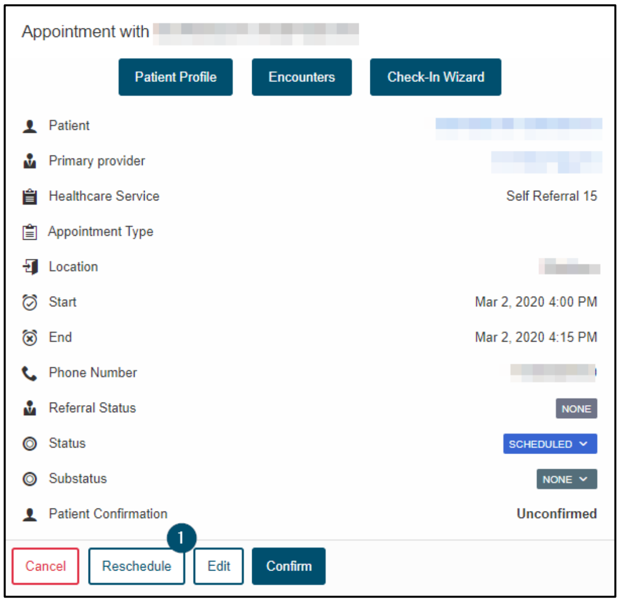


10. Hover over the bottom of the appointment and left click and drag down to **extend the time**.

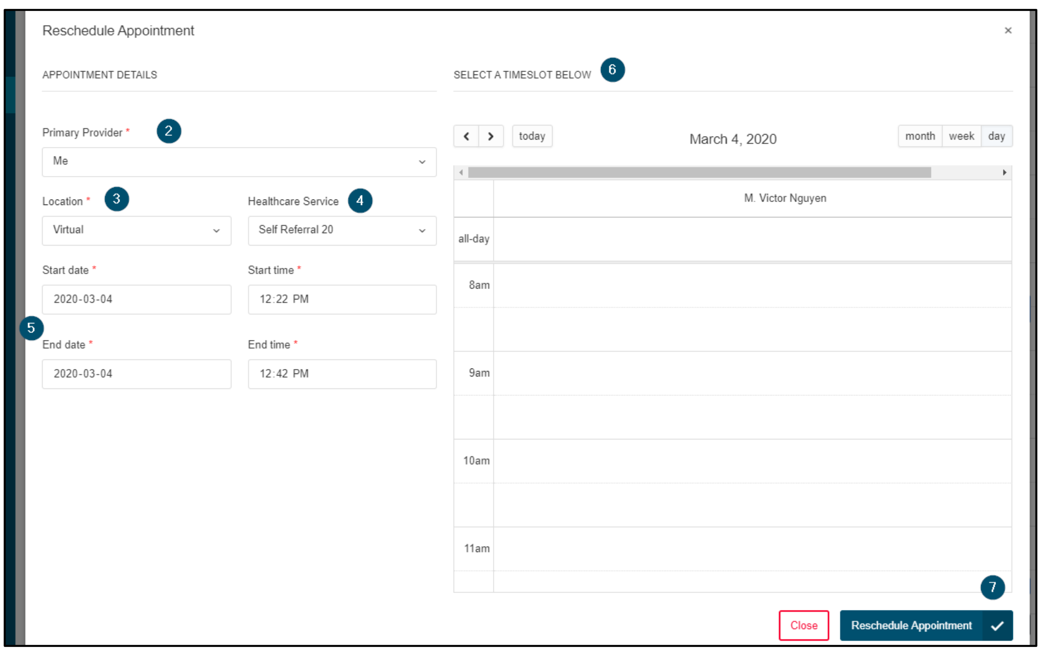


11. If applicable, change the **Primary Provider** of the appointment.
12. If applicable, change the **Location** of the appointment.
13. If applicable, change the **Healthcare Service** of the appointment.
14. Confirm the **date and time** of the appointment.
15. **Time** can also be adjusted from the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

3.2.2 Rescheduling from Appointment Details

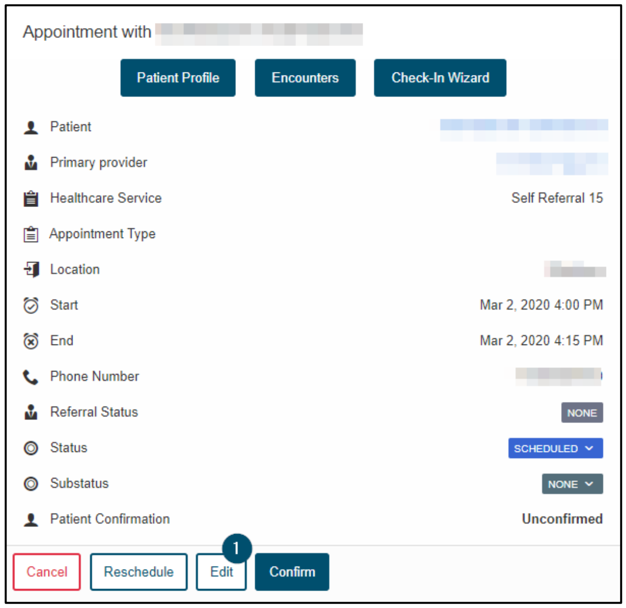


1. Click the “**Reschedule**” button in the top-left side of the Details page.

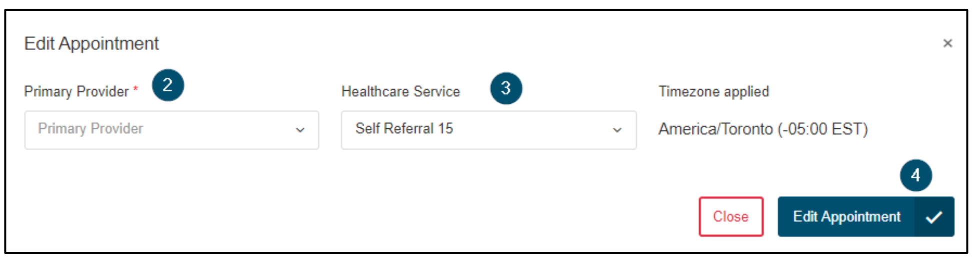


2. If applicable, change the **Primary Provider** of the appointment.
3. If applicable, change the **Location** of the appointment.
4. If applicable, change the **Healthcare Service** of the appointment.
5. Confirm the **date and time** of the appointment.
6. **Time** can also be adjusted from the Calendar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

3.3 Edit an Appointment



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

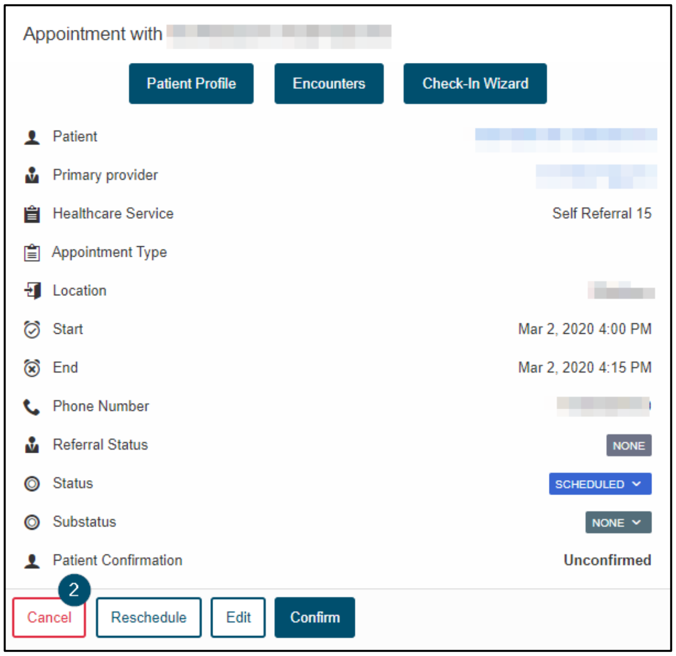


8. If applicable, change the **Primary Provider** of the appointment.
9. If applicable, change the **Healthcare Service** of the appointment.
10. Click “**Edit Appointment**” to save the changes.

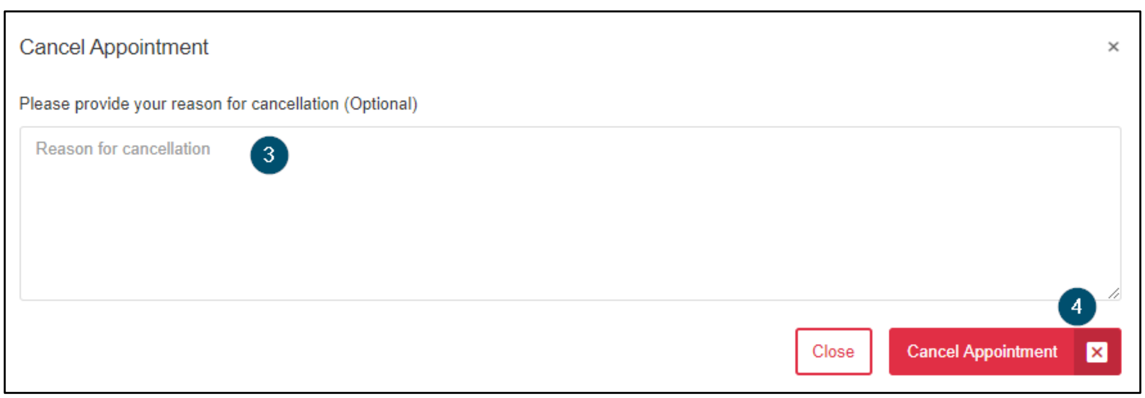
3.4 Cancel an Appointment

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.



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

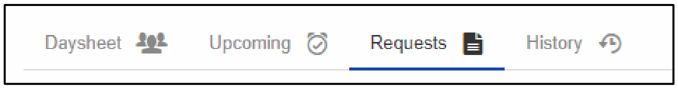


3. Type a "**Reason for Cancellation**"as applicable.
4. Click "**Cancel Appointment**" to cancel the appointment.

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.

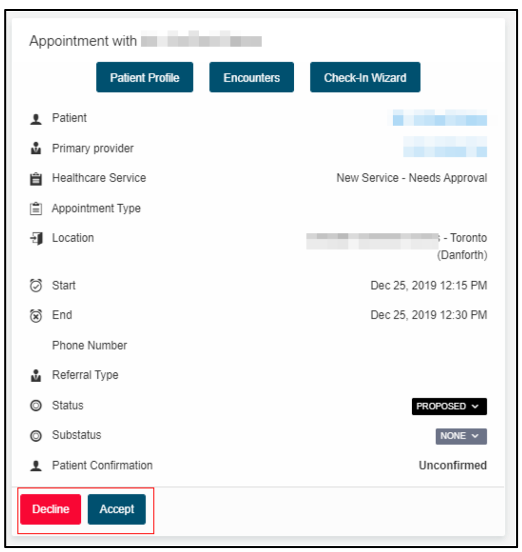
3.5.1 Accepting or Declining Appointment



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.

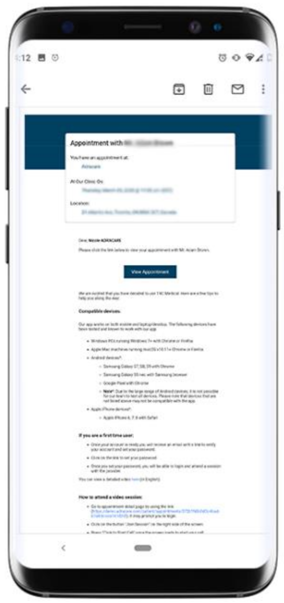
Note: You can also accept or decline the appointment from the appointment details page.



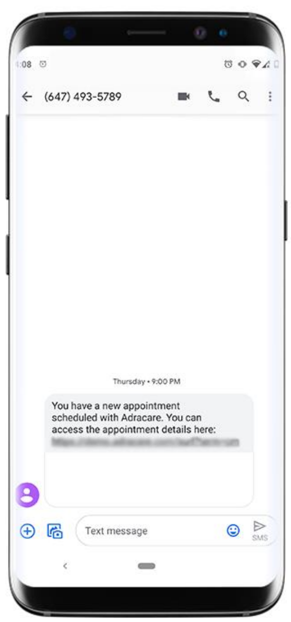
3.6 Appointment Notifications

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

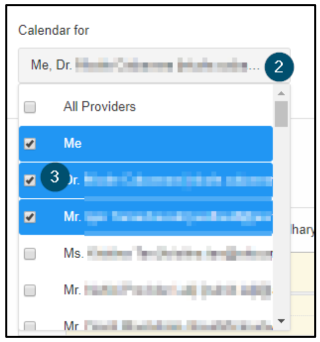


3.7 Viewing other providers appointments

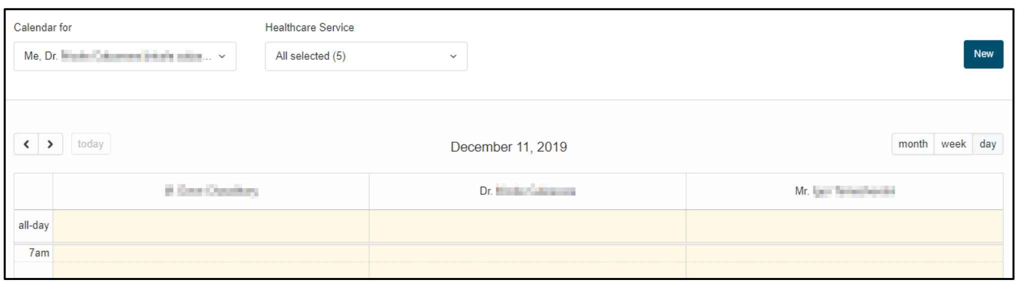
As an administrator, you can view other provider appointments from within "**Calendar**" and "**Appointments**".

3.7.1 Calendar

1. Click "**Calendar**".



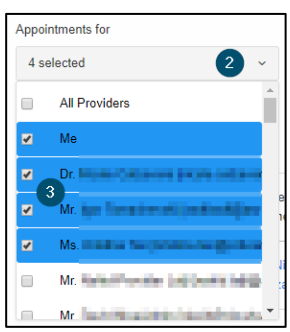
2. Click the "**Calendar for"** field.
3. Select one or multiple **provider name(s).**



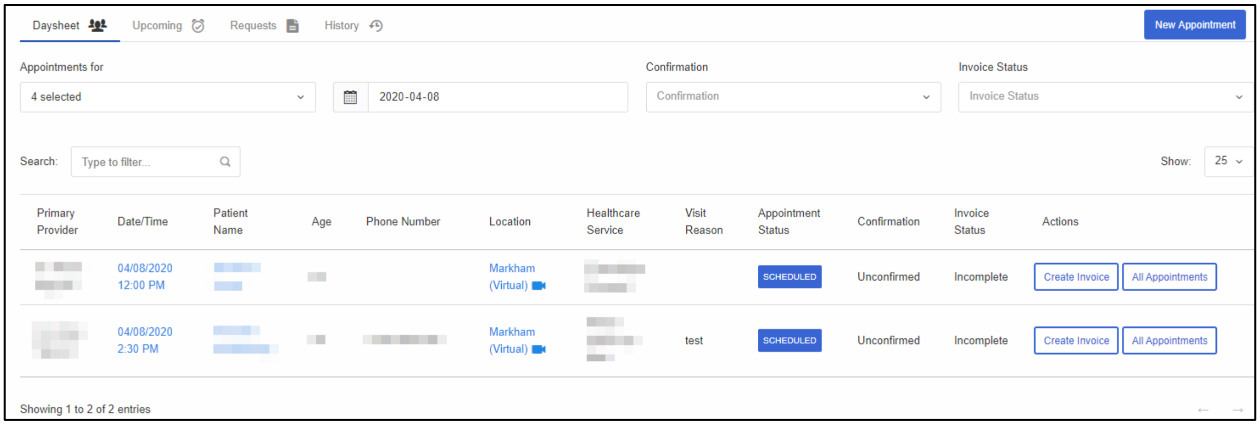
4. The schedule(s) will load in the calendar.

3.7.2 Appointments

1. Click "**Appointments**".



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

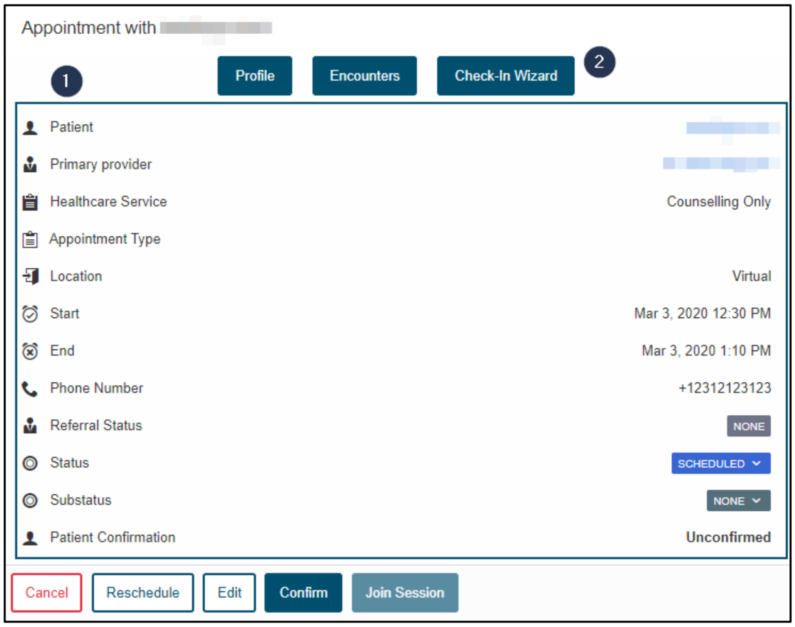


4. The appointment(s) will load in the list.

4 Appointments

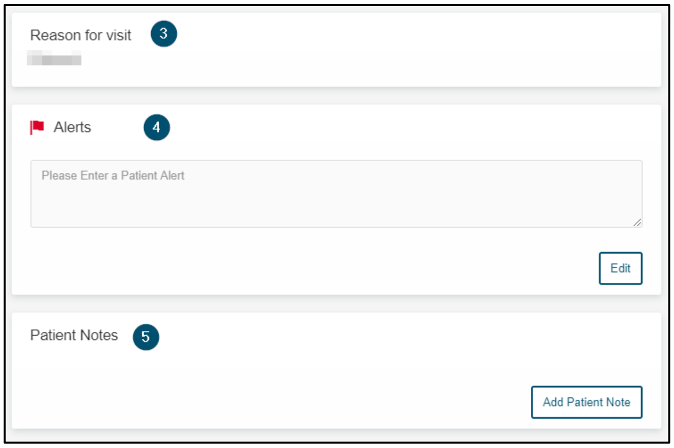
4.1 Appointment Details

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.

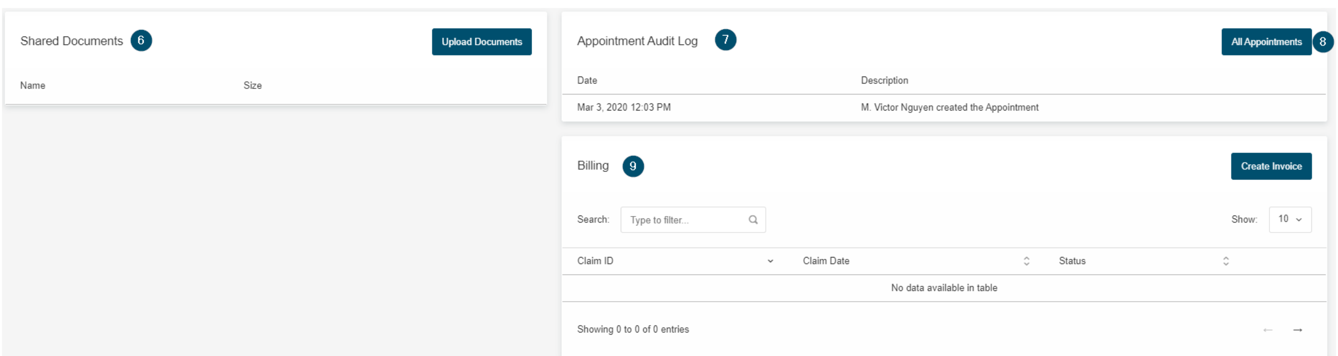


The top right-side panels show:

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

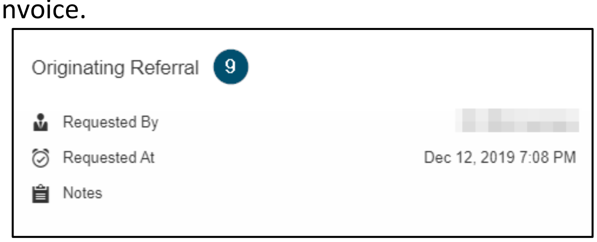
Note: Patient Alerts can also be seen in the [Patient's Profile].

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

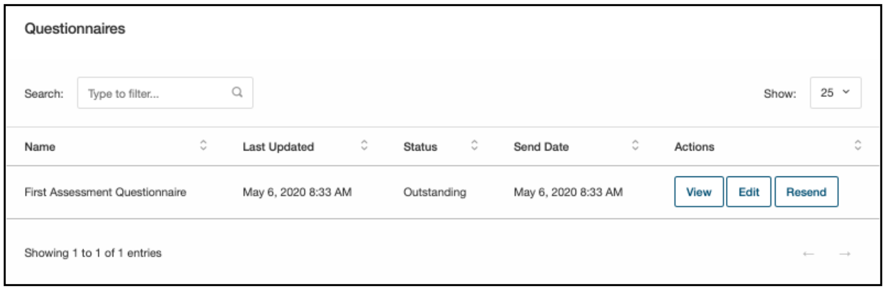


As you scroll further down:

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: Type to filter... Show: 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.

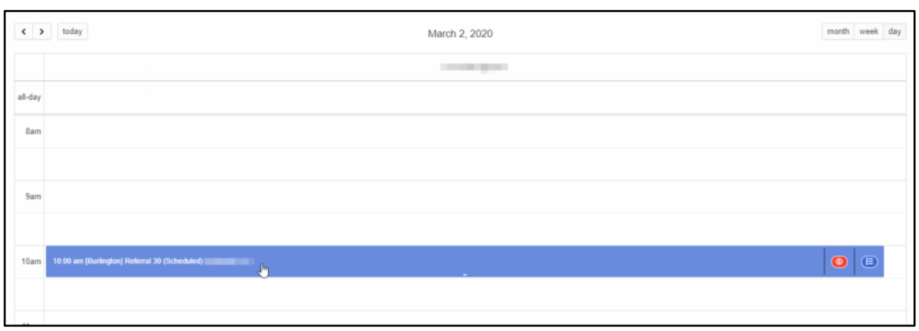
Note:

- 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

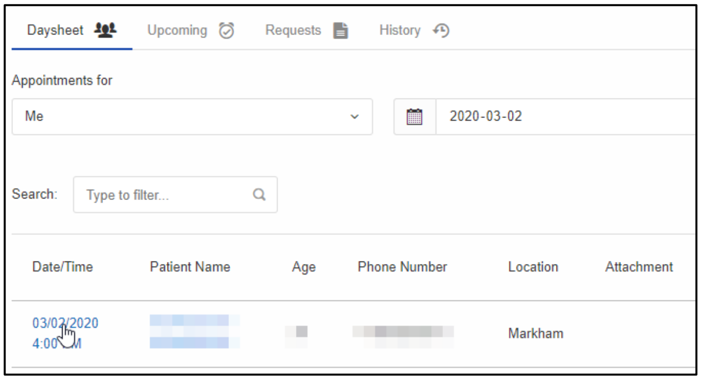
There are three ways to access a scheduled appointment's details:

Calendar



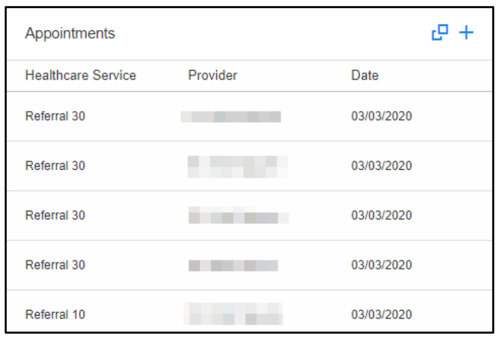
1. Click on **Calendar**
2. Click on the appointment

Appointments



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

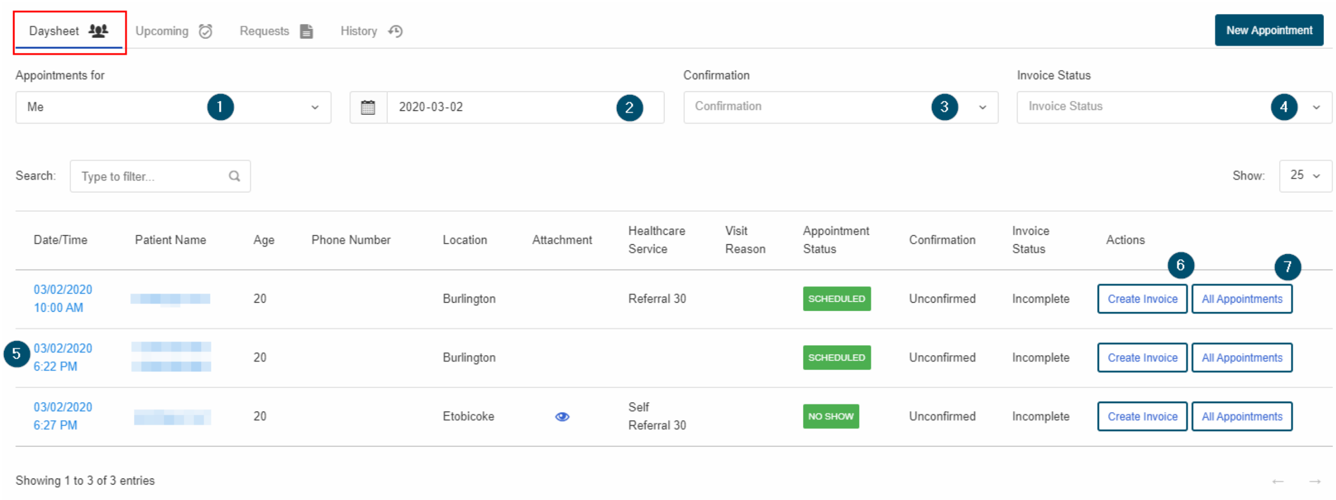
Patient Profile (CPP)



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.



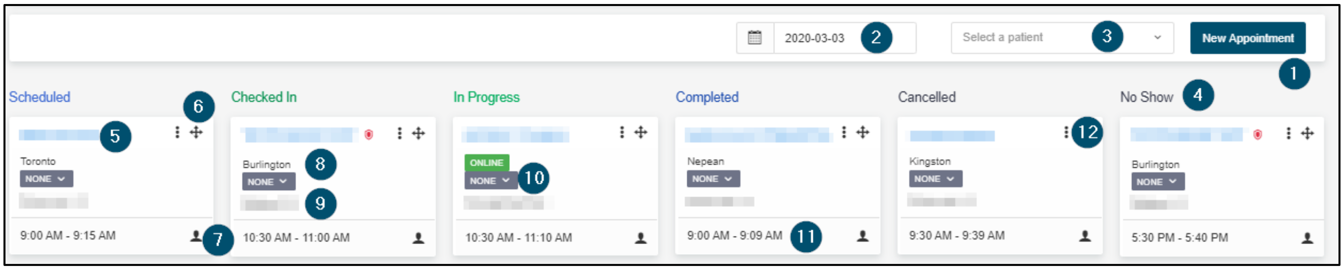
1. If applicable, select a **provider** to view their schedule.
2. Select a **day** to see the schedule for it (the view always defaults to the current day).
3. Select an **appointment confirmation** status to filter the appointments.
4. Select an **Invoice Status** to filter the appointments.
5. Review 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.

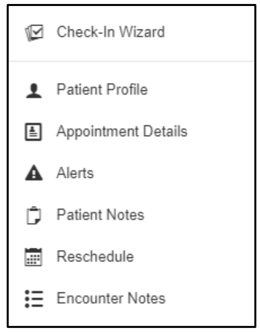
4.3.1 Registration (Card View)



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**.**

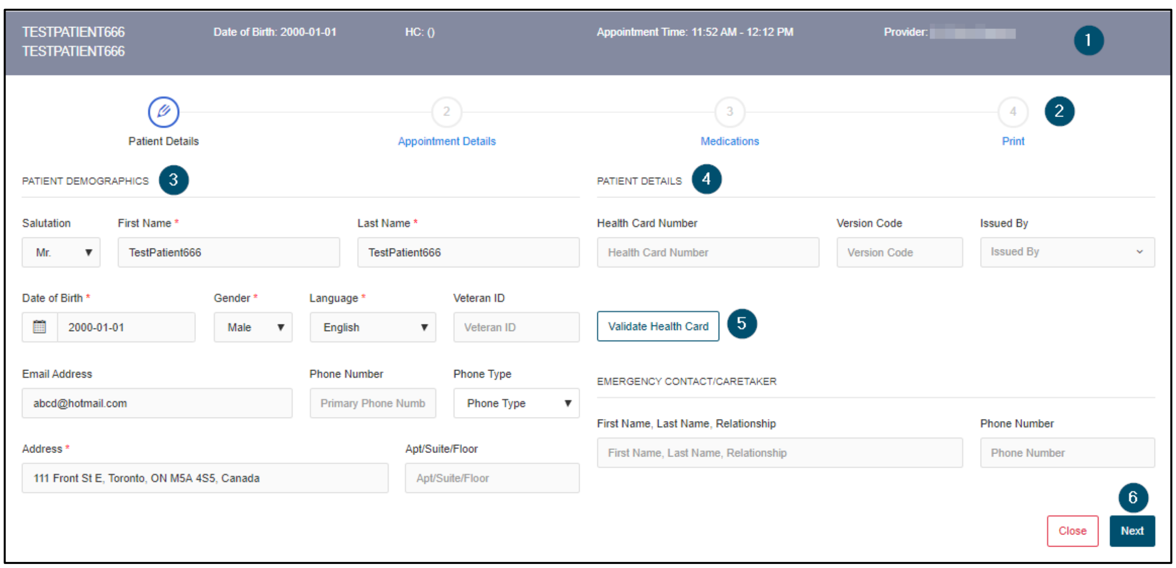
Note: A patient will have the following icon beside their Name to easily identify veterans.

6. Click and drag the card under a status to **update** the **appointment status**.
7. Click and choose a status to **update t**he **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.



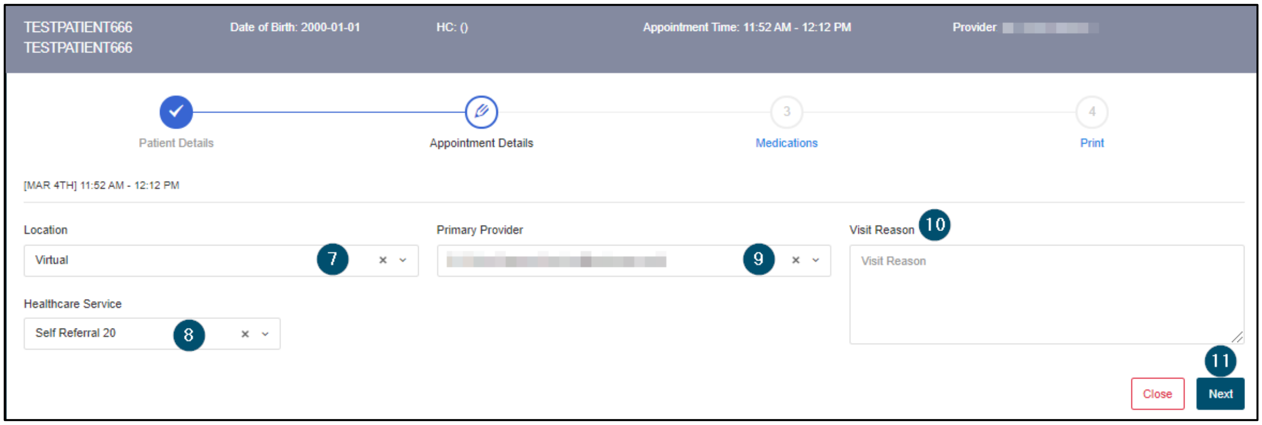
12. Click for a menu in relation to the patient and/or their appointment:
    - **Check-In Wizard**: Open the Check-In Wizard.
    - **Patient Profile**: Access the Patient Profile.
    - **Appointment Details**: Access the appointment details.
    - **Alerts**: Add a patient alert.
    - **Patient Notes**: See and add a Patient Note.
    - **Reschedule**: Reschedule an appointment.
    - **Encounter Notes**: Access the encounter notes.

4.3.2 Check-In Wizard

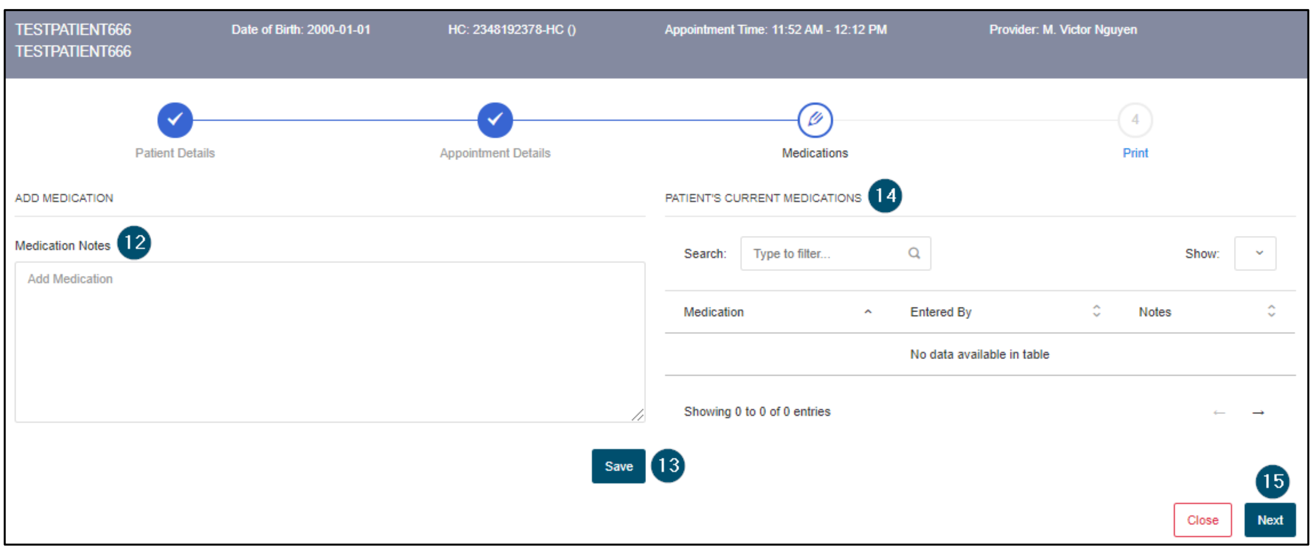


1. See **basic patient details** on all Check-In Wizard tabs. The bar will be colour-coded depending on the patient's health card status:
    - Green – Valid health card
    - Red – Invalid health card
    - Gray – Unverified health card
2. Fill out the five **tabs** of the Check-in Wizard to register 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.

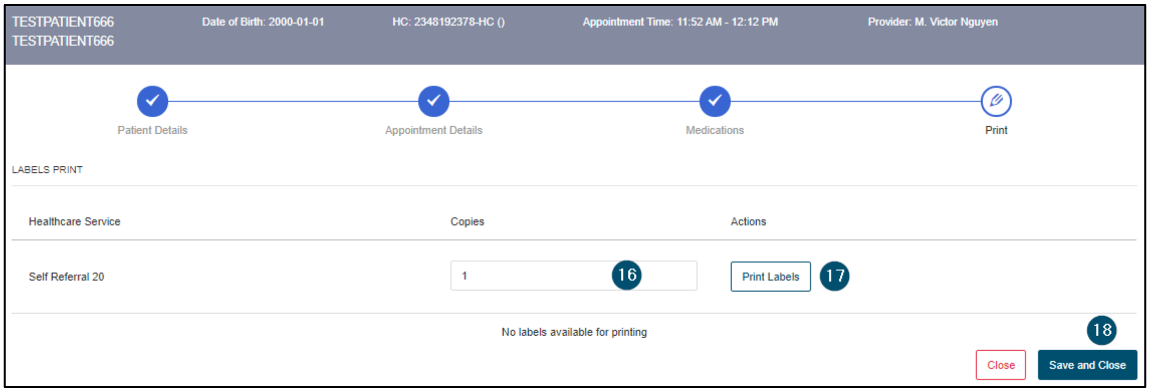
5. Validate the patient's **health card**.
6. Press Next to go to the "**Appointment Details**" page.



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.



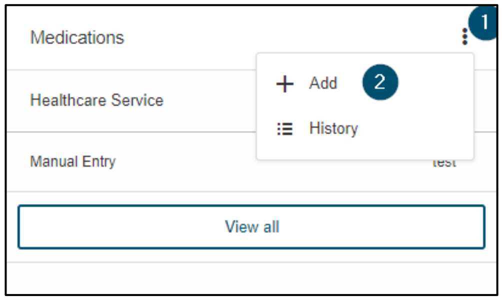
16. Type in the **amount of labels** to print.
17. Print the **labels**.
18. Save and close the **Check-In Wizard**.

4.4 Encounters

Users can document patient appointments by creating an encounter.

4.4.1 *Adding to the Cumulative Patient Profile (CPP)*

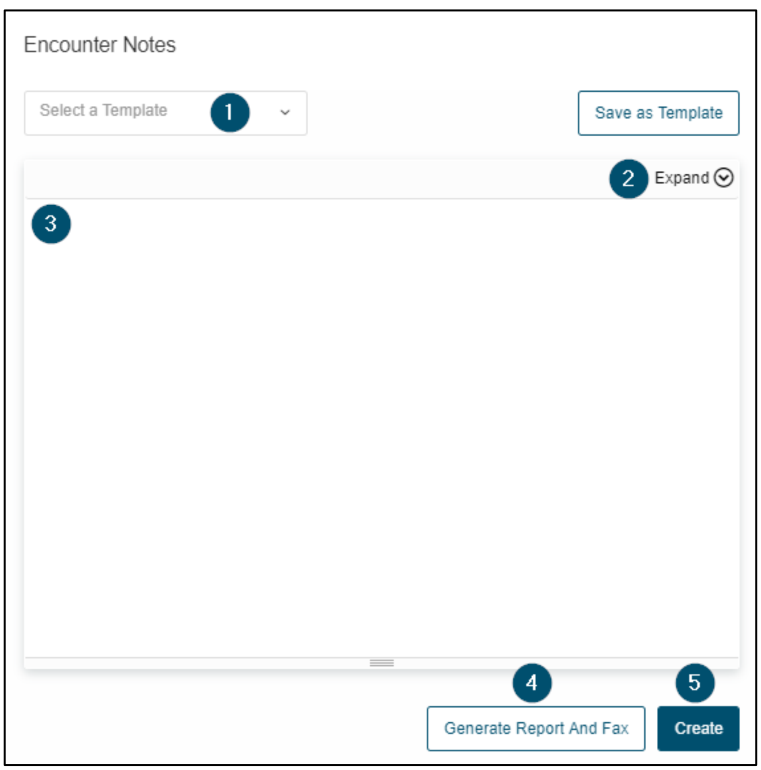
For more information on the CPP, see the Cumulative Patient Profile (CPP) section.



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

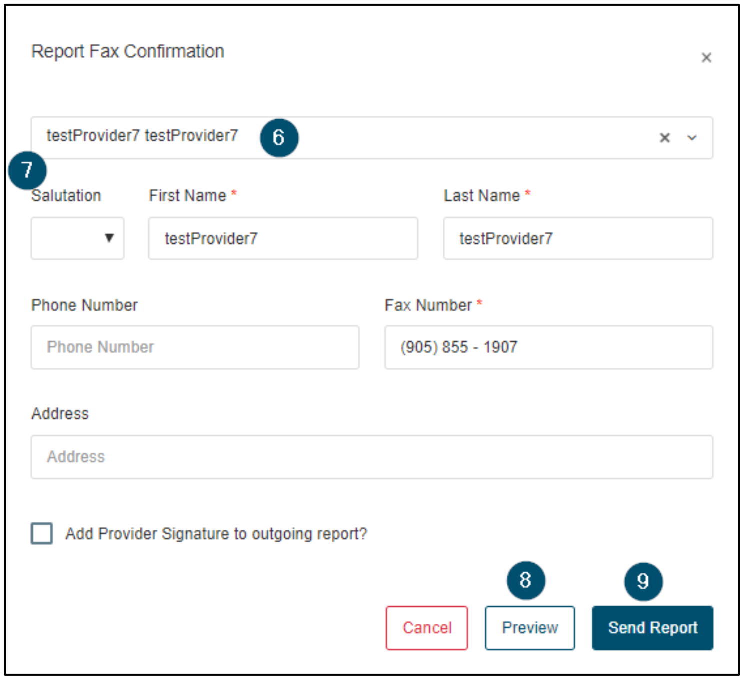
4.4.2 *Creating Encounter Notes*

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.

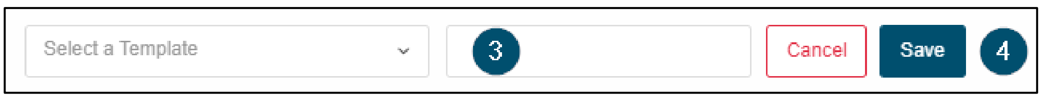


6. Select a new provider (if applicable)
7. Verify/Edit provider’s details
8. A preview of the report can be viewed by clicking “**Preview**”
9. To fax the report to the provider click “**Send Report**”

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.

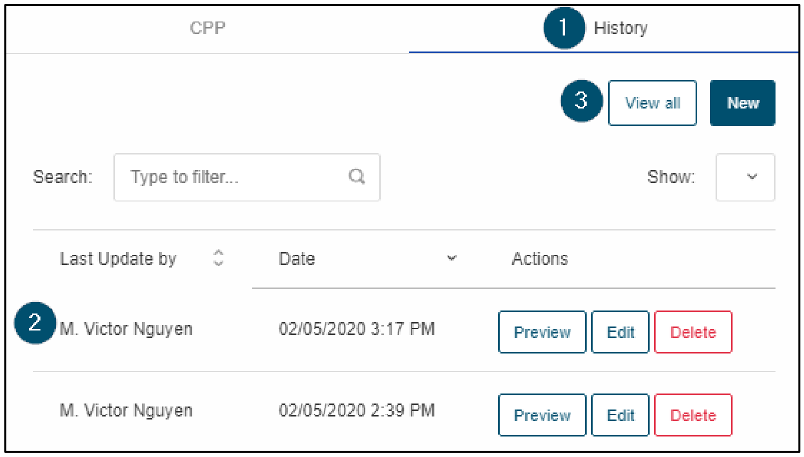
4.4.4 Importing a Completed Questionnaire

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

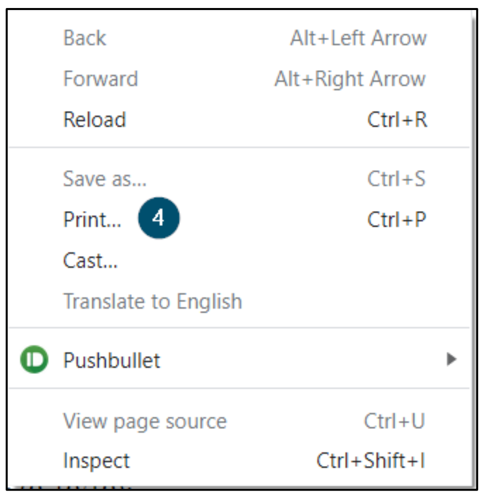
1. In the **Encounters** page for the patient, click on the **Import Questionnaire Response** button.
2. In the modal, click on the dropdown and select the completed questionnaire and click on the questionnaire you want to import.
3. Click on the **Import** button**.**
4. You will find the unstructured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



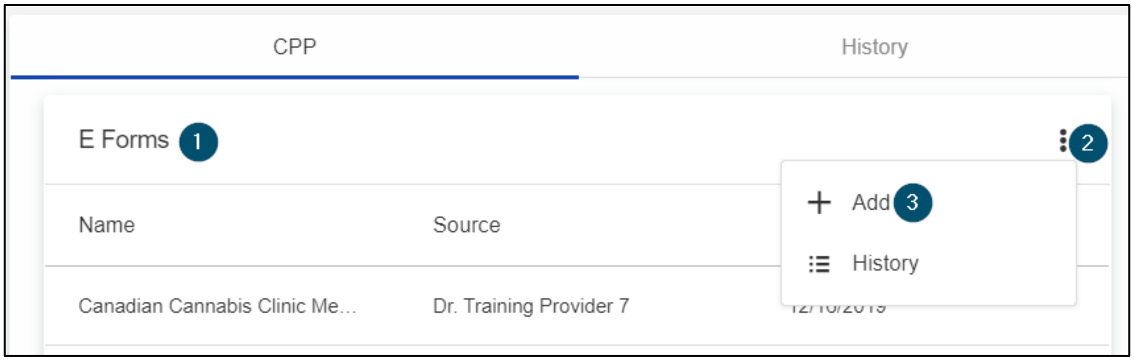
1. Click on the "**History**" tab next to CPP.
2. The list of past encounter notes are displayed. A particular note can be viewed by clicking the "**Preview**" button.
3. All encounter notes can be viewed by clicking the "**View all**" button.



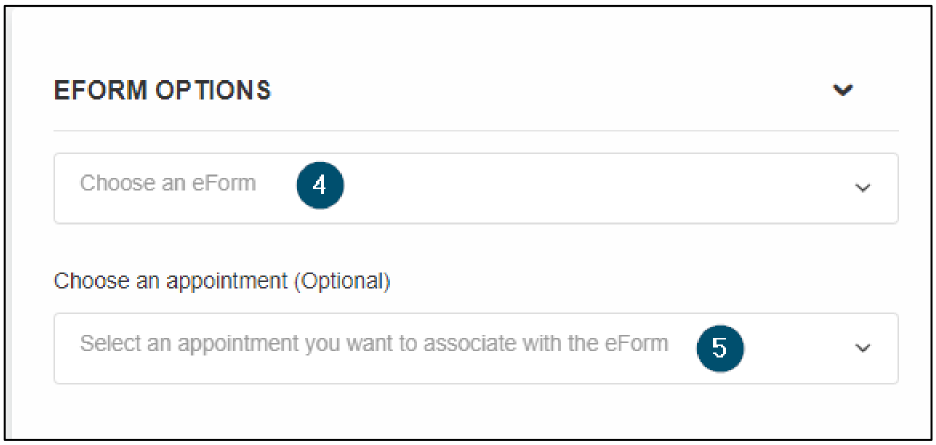
4. To print an encounetr note, within the encounter note popup, right click within the note and select "**Print**".

4.4.6 Prescription Fulfillment

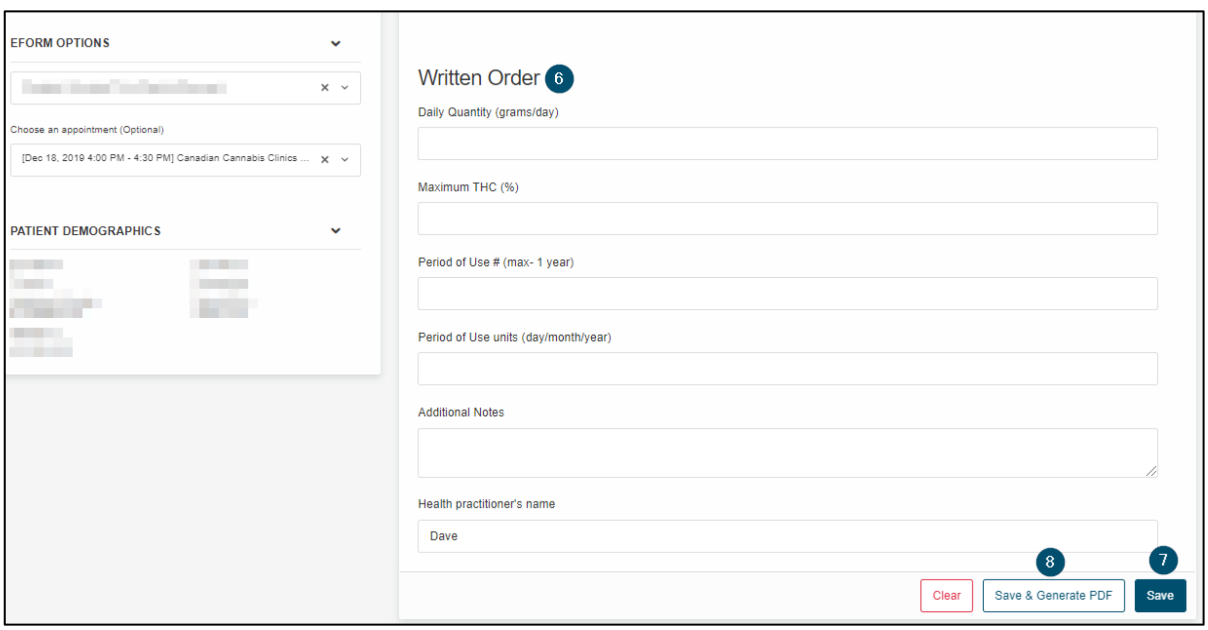
Prescriptions can be added from either the CPP page for a patient (see the <u>Cumulative Patient Profile (CPP)</u> section) or the CPP located within the Encounters section.



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

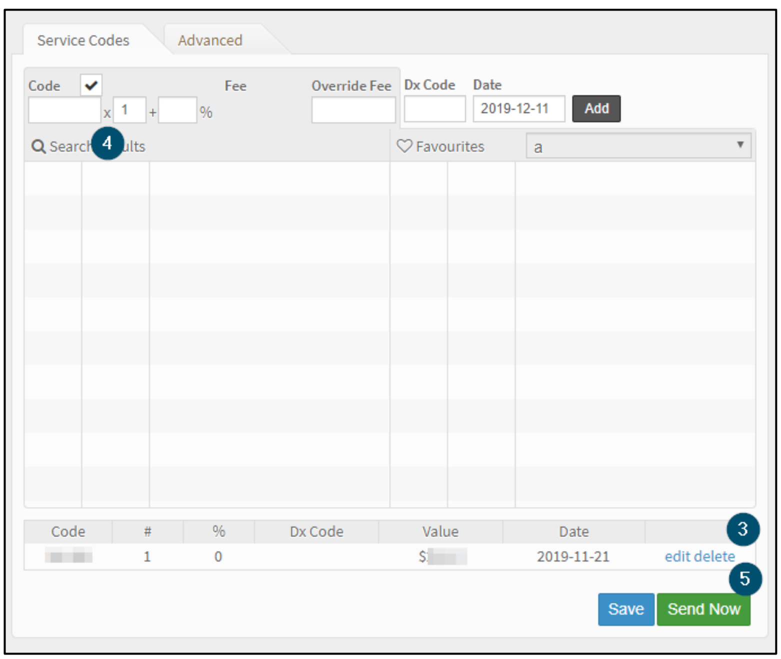
ClinicAid has been integrated into the platform to view invoice status from the encounter. There are two ways to create invoices. To access the billing section for an appointment, after scheduling the patient appointment, go to the Appointment Details page.

4.5.1 Creating an Invoice

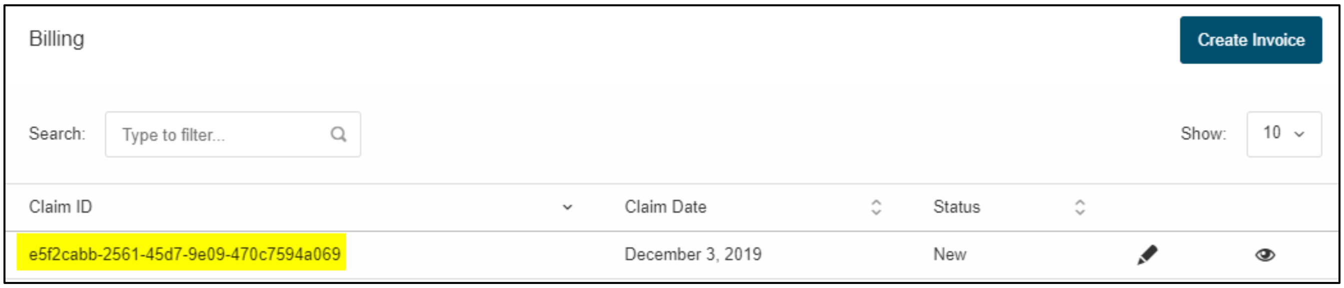
Create an Invoice from Appointment Details

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.

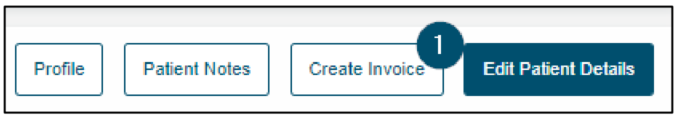


3. **Delete the existing code** at the bottom of the invoice (if applicable).
4. Add the relevant **billing code** to the invoice.
5. Click “**Send Now**” to save the invoice.

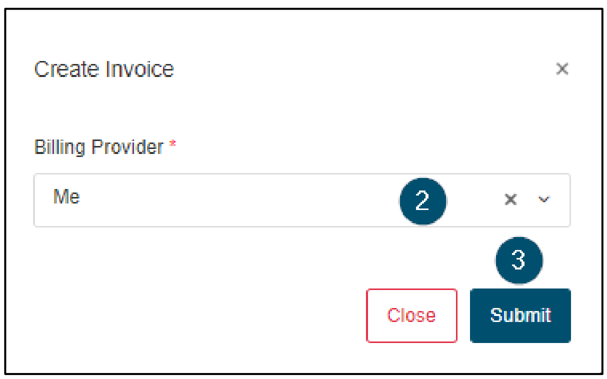


Create Invoice from Patient Profile/Encounters Pages

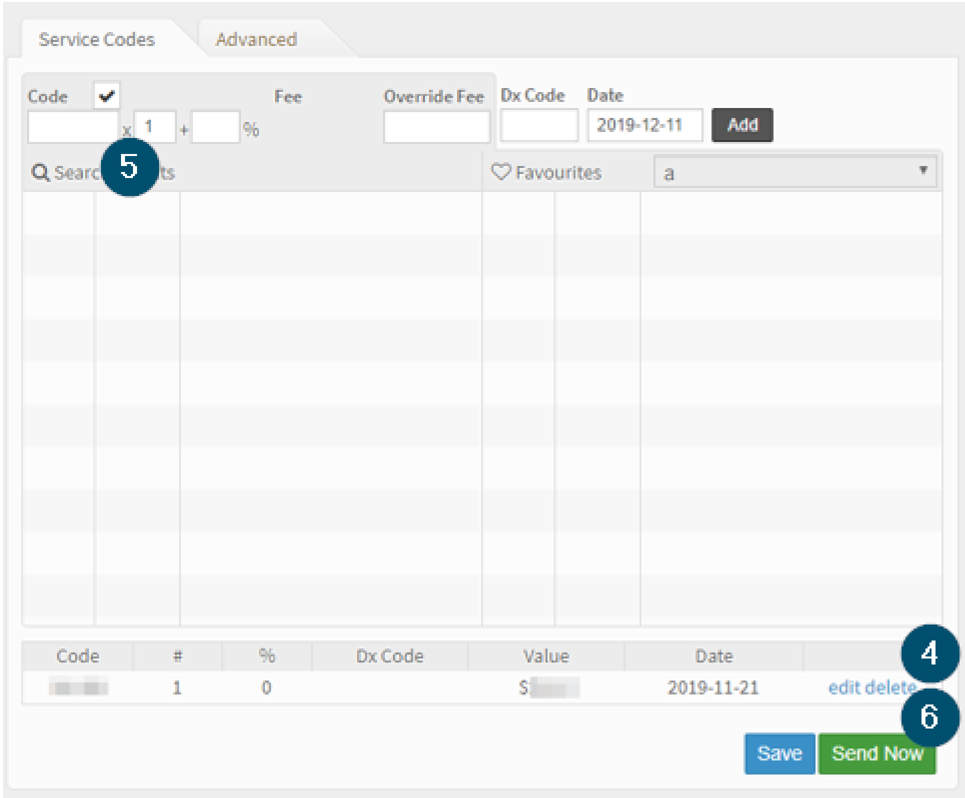
The other way to create an invoice is located on the patient ribbon located on the patient profile or the encounters page.



1. Click the "**Create Invoice**" button.



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

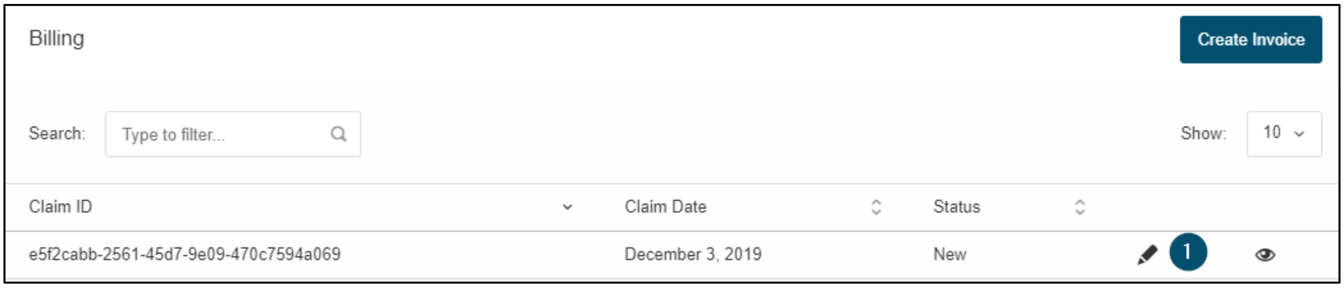


4. **Delete the existing code** at the bottom of the invoice (if applicable).
5. Add the relevant **billing code** to the invoice.
6. Click "**Send Now**" to save the invoice.

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:



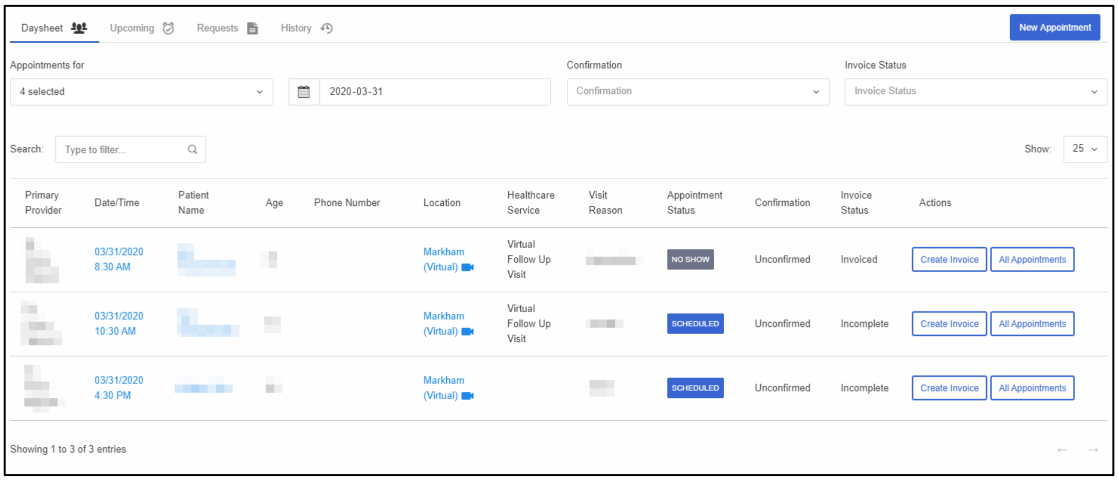
1. In “**Billing”** of Appointment Details page, click the **Edit Invoice** button (pencil icon).
2. A ClinicAid window of the existing invoice will pop up.

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.

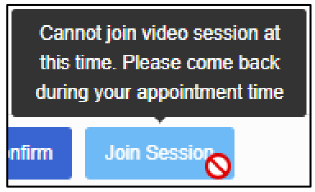


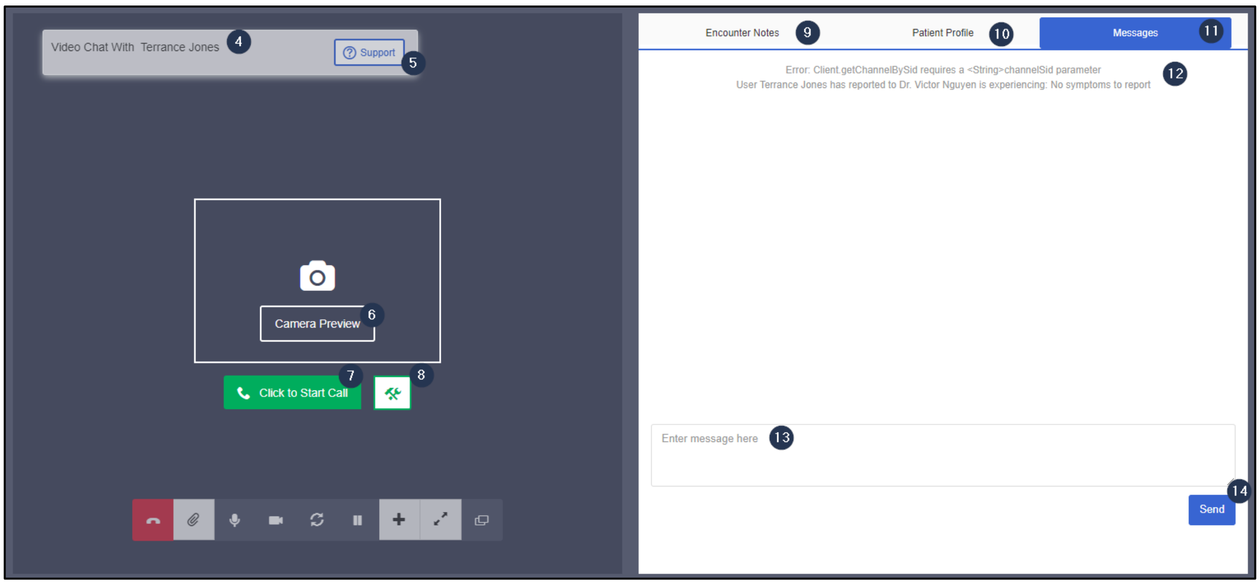
1. After logging into your account, go to **Appointments** and go to the “**Daysheet**” tab.
2. Click the Date/Time of the upcoming appointment.

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.

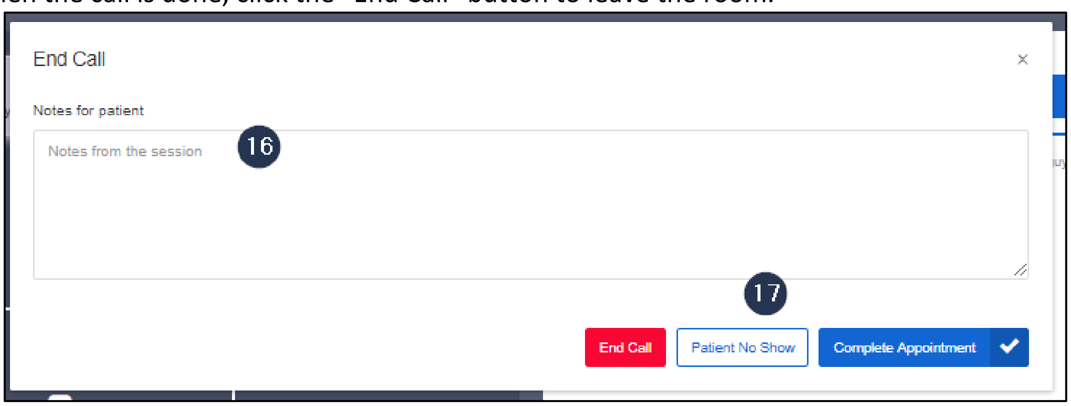
8. Once ready, click the "**Click to Start Call**" button and you will be taken into the virtual room to meet with the session participants.

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 partipants.

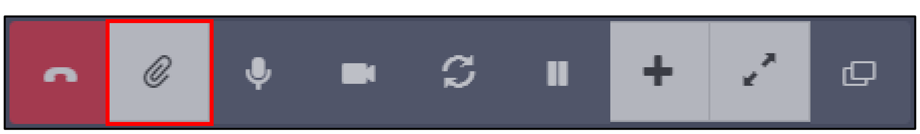
Note: Error logs will also appear in the Chat Log. If you have any technical difficulties, please reference the errors to the Support Team.

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

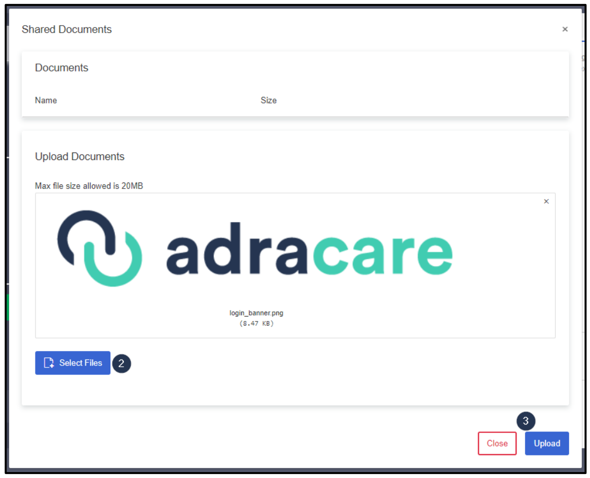


16. Type in a note for the patient as applicable.
17. Choose one of the options to leave the room:
    a. **End Call** – leave the call
    b. **Patient No Show –** if the patient does not show up for the appointment
    c. **Complete Appointment** – mark the appointment as completed and leave the call

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.

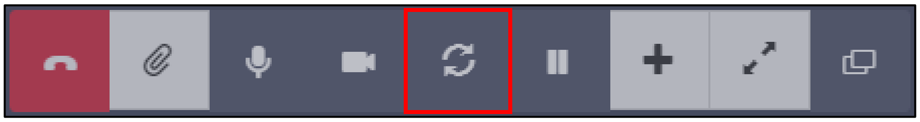
Mute / Unmute your Microphone

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)

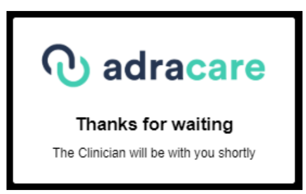


1. Click the **arrows in a circle** to **switch** between the front-facing (selfie) to the back-facing cameras.

On Hold

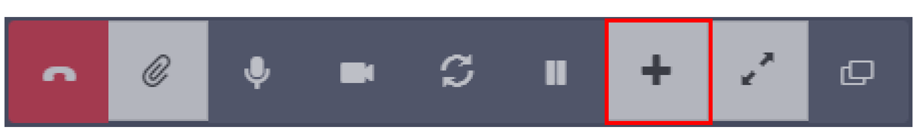
Pause your session with the patient by clicking the “**On Hold/Resume**” button.

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:

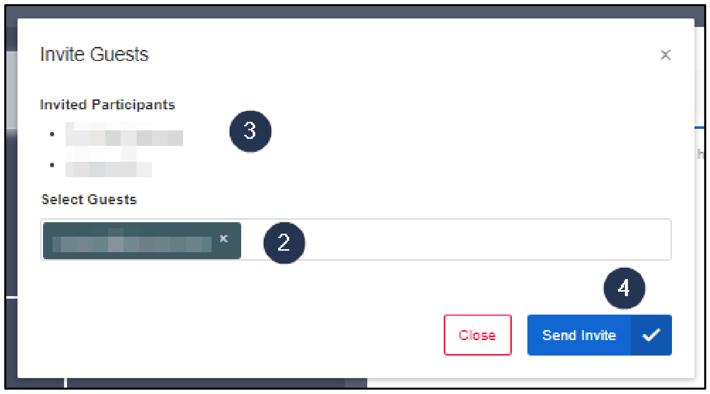


3. **Turn your microphone and turn on your camera** when you are ready by using the “**On Hold/Resume**” button.

Adding a Guest



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

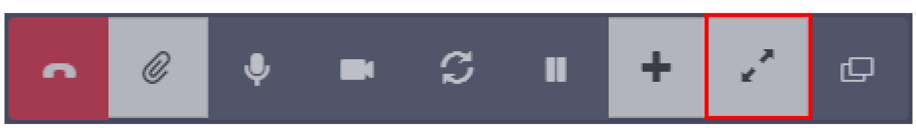


2. In the "Select Guests" text box, type in the **full email address** of the guest and press **ENTER or** select the **email** from the dropdown**.**
   The email has been properly added to the invitation list when it is highlighted.

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.

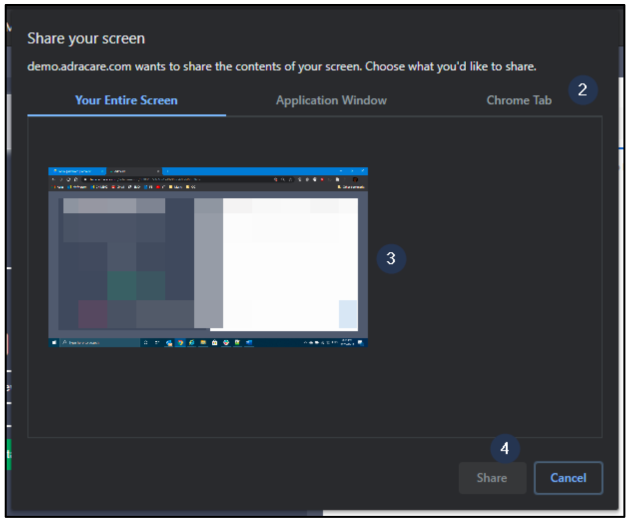
Full Screen



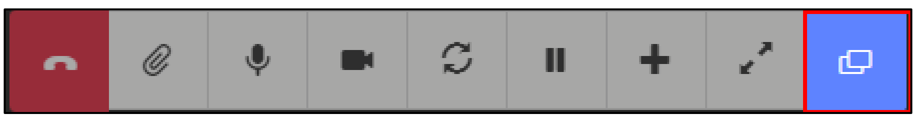
1. Click the **arrows pointing to the outside corners** to **expand** the video feed to the full length of the window.

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).

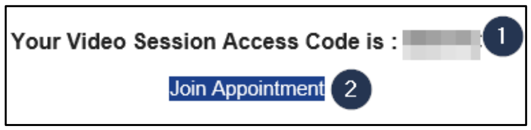


5. Click “**Stop Sharing**” to stop sharing the screen(s).

5.1.2 Join as a Patient

Login-less (System Default)

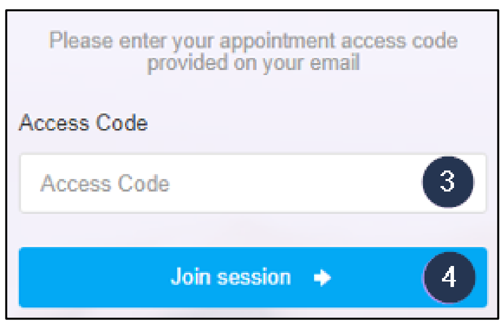
A patient's access link to the appointment will be sent in the appointment confirmation and reminder emails prior to the scheduled start time of the appointment.



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

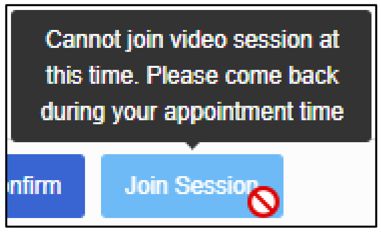
Note: If you did not receive emails from Adracare, please check your Junk/Spam folder.

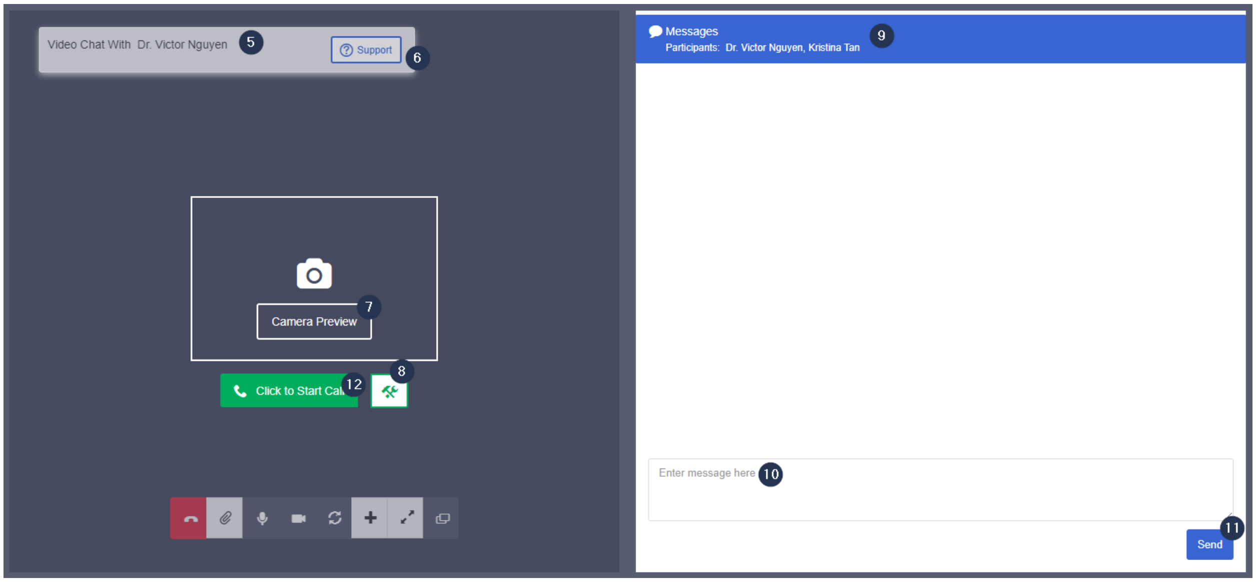
2. Click the "**Join Appointment**" link and the browser should open to the access code landing page.



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.

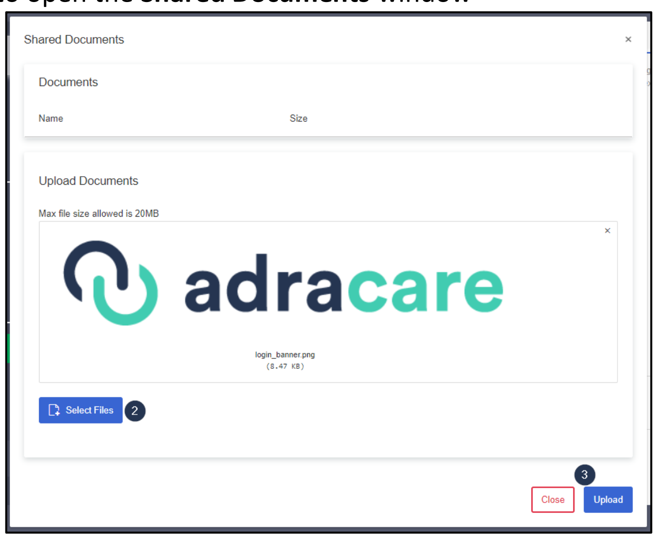
10. **Type a message** to a participant.
11. Click "**Send**" to send the message to the partipants.
12. Once ready, click the "**Click to Start Call**" button and you will be taken into the virtual room to meet with the session participants.

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

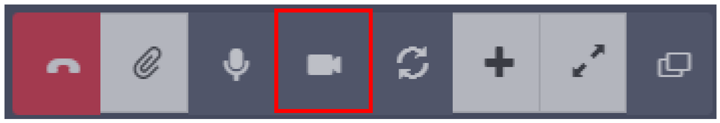


2. **Select a file** from your computer
3. Click **Upload**
4. The provider will be able to download the file during the session. The paper clip also shows on their side.

Mute / Unmute your Microphone

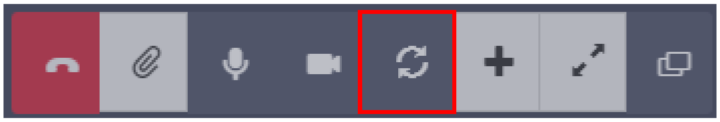
1. Click the **microphone** button to **mute or unmute** the device's microphone.

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)



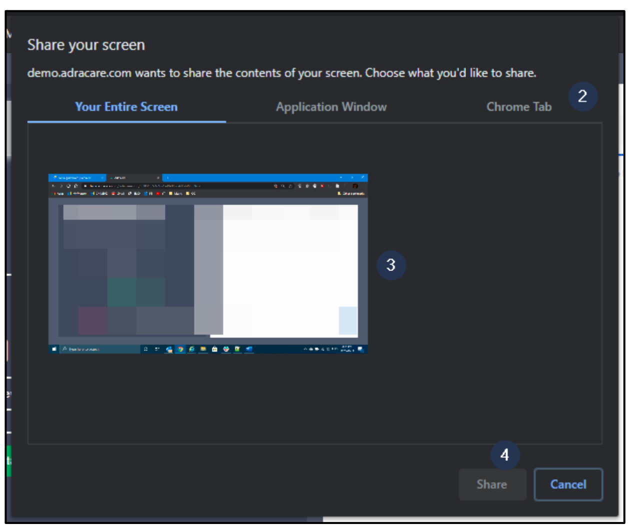
1. Click the **arrows in a circle** to **switch** between the front-facing (selfie) to the back-facing cameras.

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.



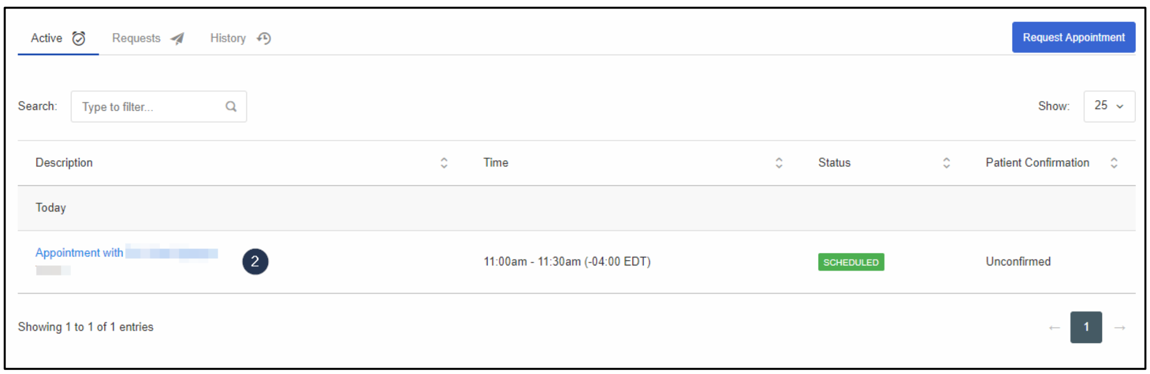
2. Choose the most appropriate screen sharing option for the situation.
3. Select the **screen, window, or tab**.

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

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

Login Required

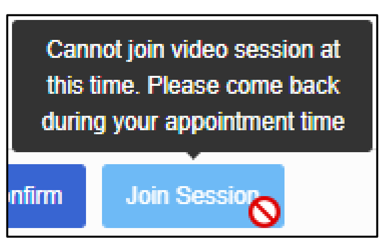
1. After logging into your account, go to **Appointments**.

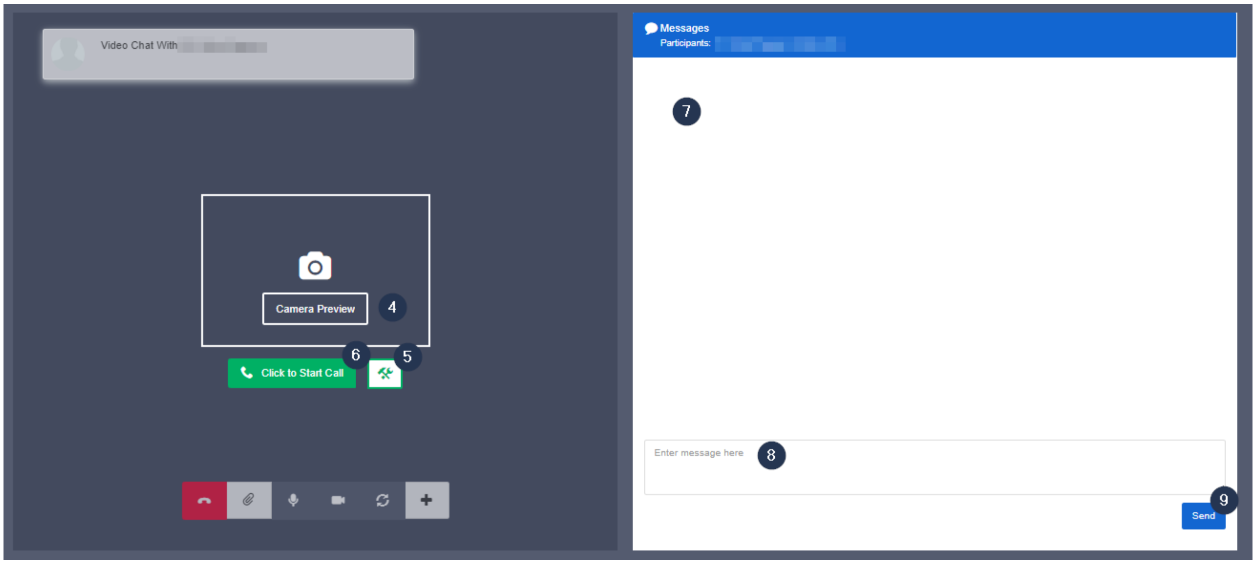


2. Click on the upcoming appointment.

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]().

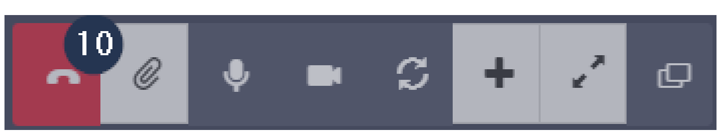
6. Once ready, click the "**Click to Start Call**" button and you will be taken into the virtual room to meet with the session participants.

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.

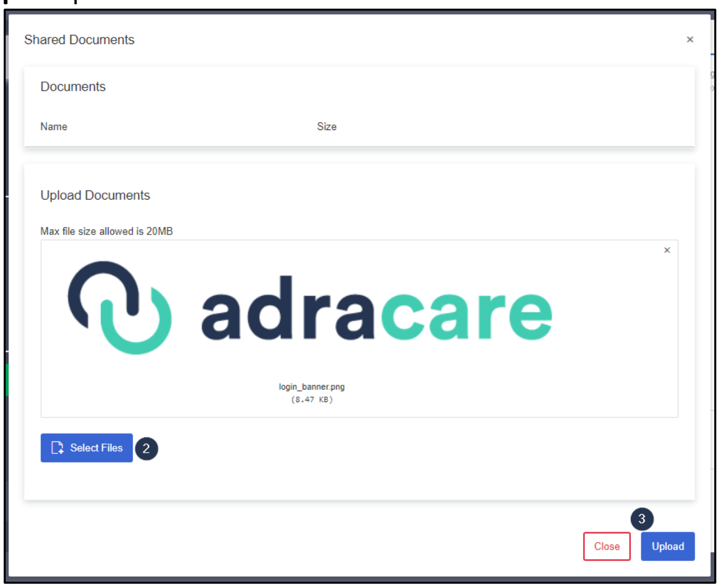
8. **Type a message** to a participant.
9. Click "**Send**" to send the message to the partipants.



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

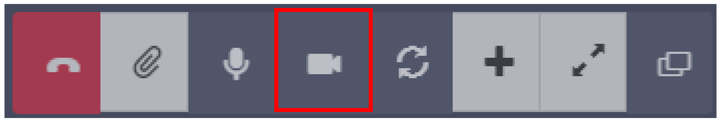


2. **Select a file** from your computer
3. Click **Upload**
4. The provider will be able to download the file during the session. The paper clip also shows on their side.

Mute / Unmute your Microphone

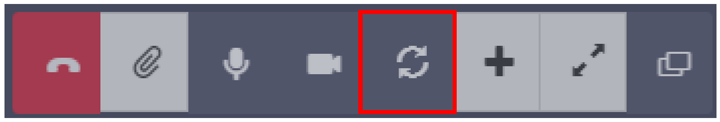
1. Click the **microphone** button to **mute or unmute** the device's microphone.

Turn off and on your camera



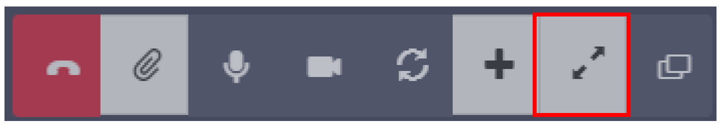
1. Click the **camera** to **turn off and on** the device’s camera.

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.

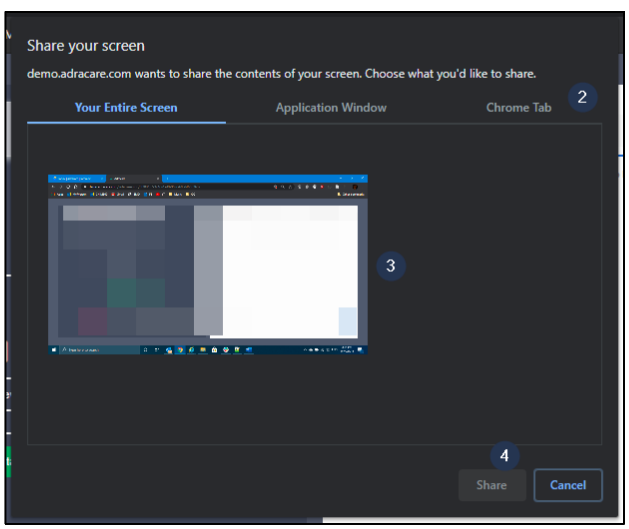
Full Screen



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.



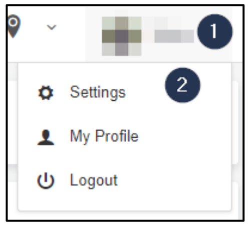
2. Choose the most appropriate screen sharing option for the situation.
3. Select the **screen, window, or tab**.

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

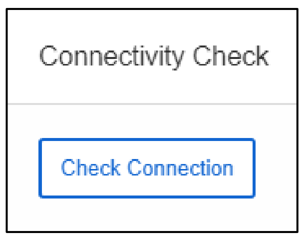
5. Click “**Stop Sharing**” to stop sharing the screen(s).

5.2 Video Session Troubleshooting

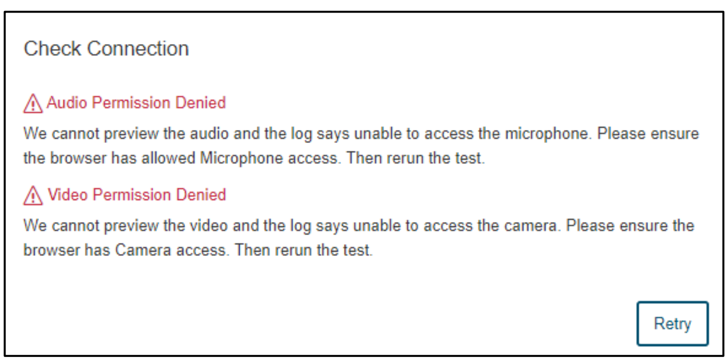
Run a diagnostic test on your computer prior to having a virtual care appointment to ensure that you can join without any issues.



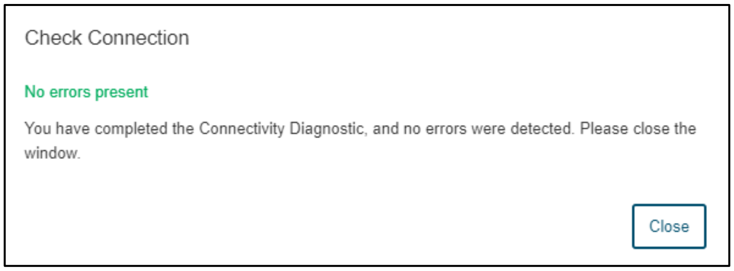
1. Click the **username** at the top-right side of the page.
2. Click "**Settings**".



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



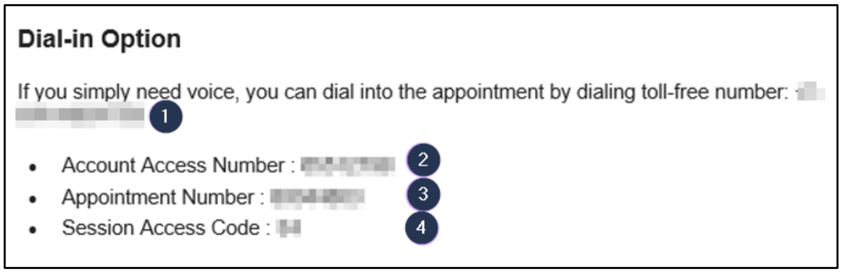
4. If the test detects something wrong, it will bring up a notification and a suggestion on how to fix the issue.



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.



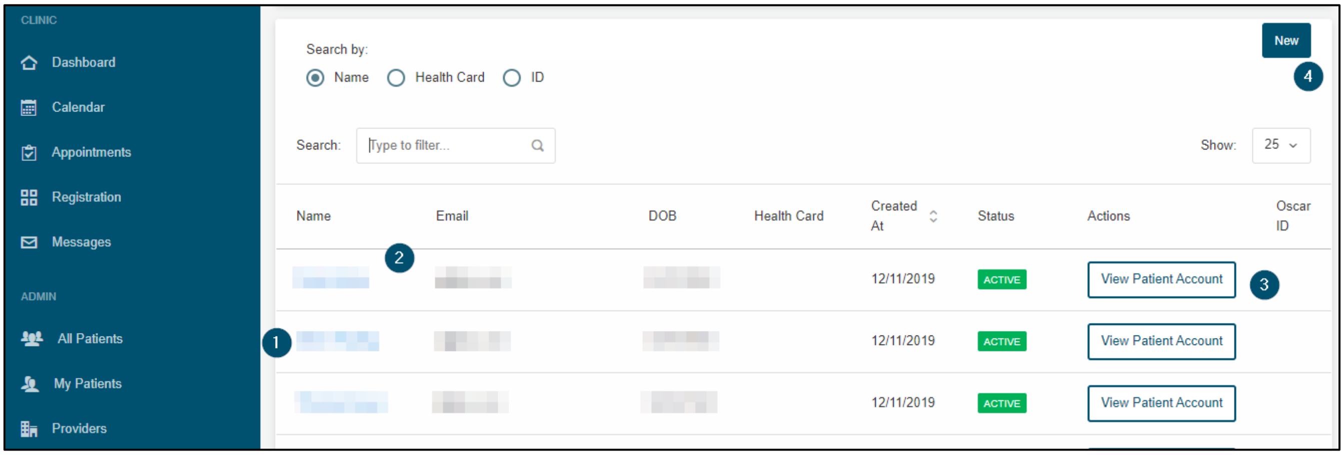
1. Call the toll-free number.
2. When prompted, enter the Account Access Number and press “#”.
3. When prompted, enter the Appointment Number and press “#”.
4. When prompted, enter the Session Access Code and press “#”.
5. You will then join the session with the provider.

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.



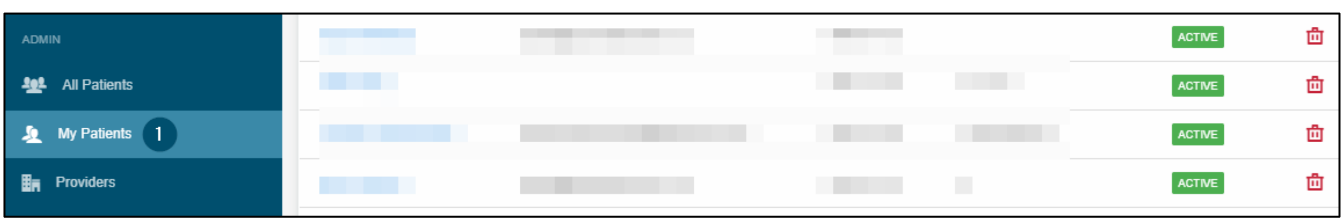
1. Click "**All Patients**".
2. Click a patient's name to easily view their CPP. For more information on the CPP, see the Cumulative Patient Profile (CPP) section.
3. Click "**View Patient Account**" to see their account settings.
4. Click "**New**" to create a new patient. For complete the details on 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.

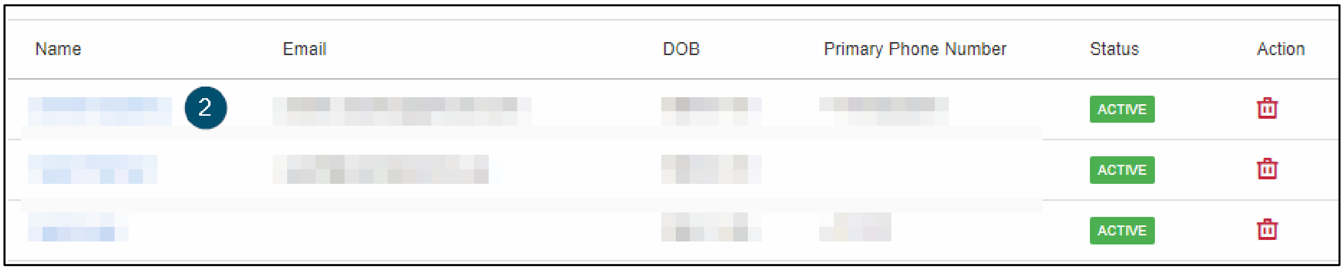
Note: A patient will show in **My Patients** if at least 1 appointment has been scheduled with the provider.

To access the list of your current patients:



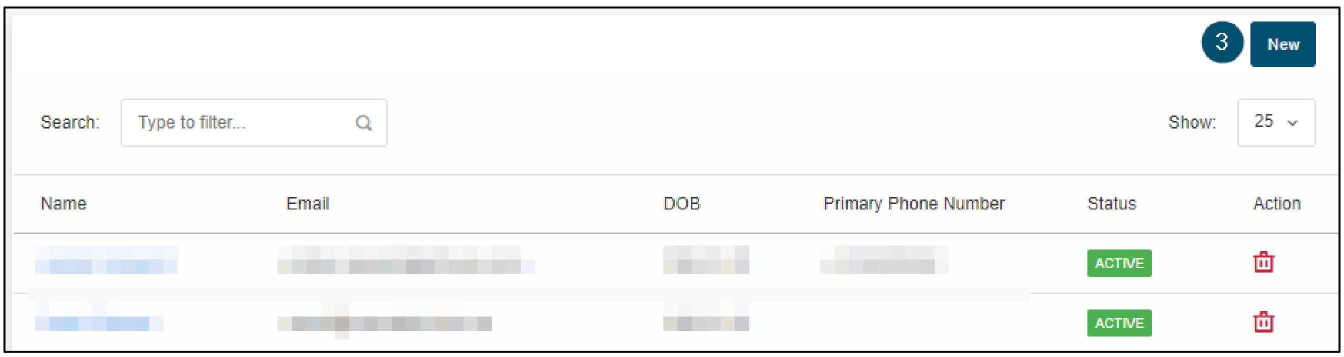
1. Click "**My Patients**".

6.2.1 View a patient's CPP



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

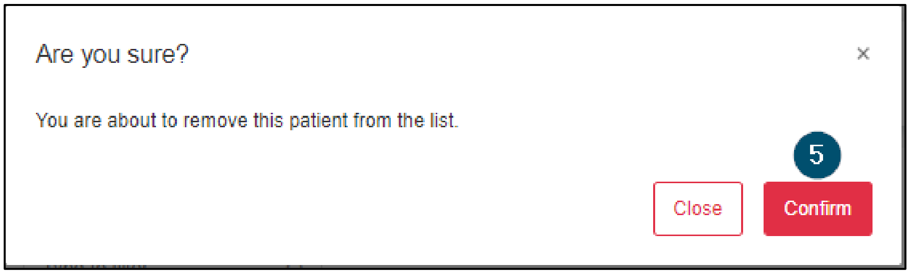
6.2.2 Add a new patient



3. 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

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



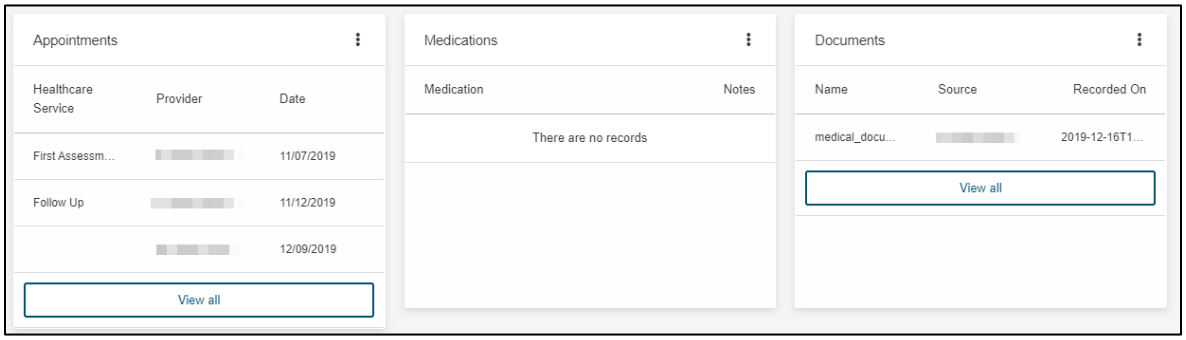
5. Click “**Confirm**” to remove the patient from your roster.

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



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 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

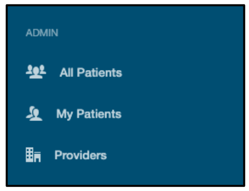
1. Under **"All Patients"** or **"My Patients"**, select the name of the patient to go to the **Patient Profile** or **Encounters**
2. Go to the Questionnaire card and click on the View All button
3. Then click on the Edit button for the questionnaire you want to edit.
4. A modal should open showing 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

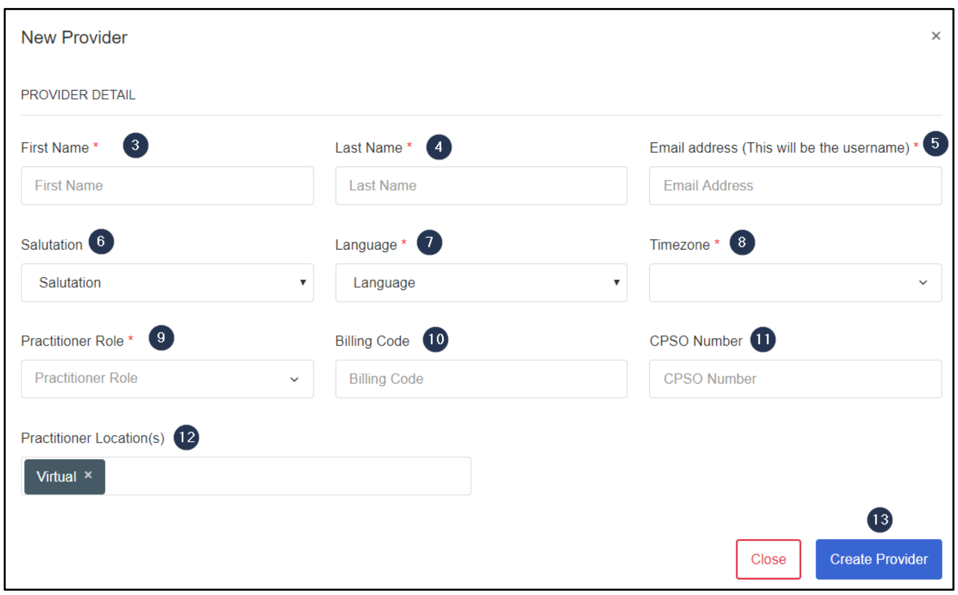
7.1 Creating a Provider

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.

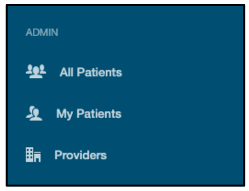


3. Type the provider's **first name**.
4. Type the provider's **last name**.
5. Type the provider's **email address**.
6. Select the provider's **salutation**.
7. Select the provider's **language** preference.
8. Select the provider's **timezone**.
9. Select the appropriate **practitioner role** for 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.

14. 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

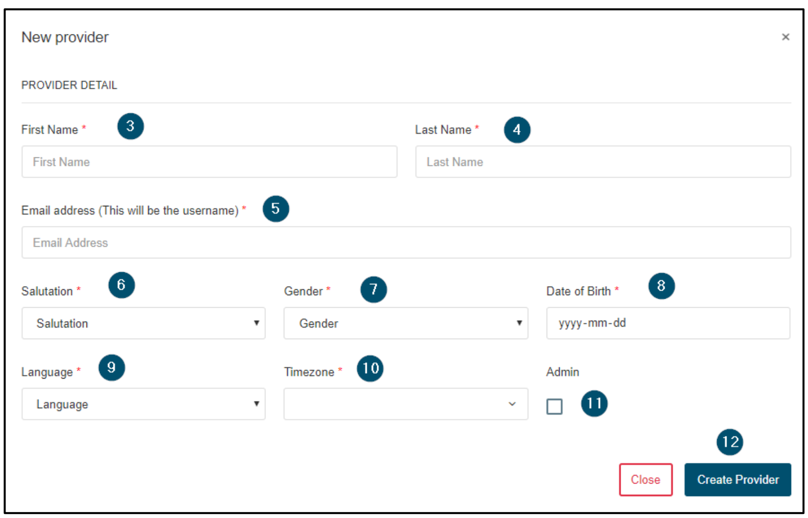
7.2 Creating an Admin

Use the steps below to create an admin profile.



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

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



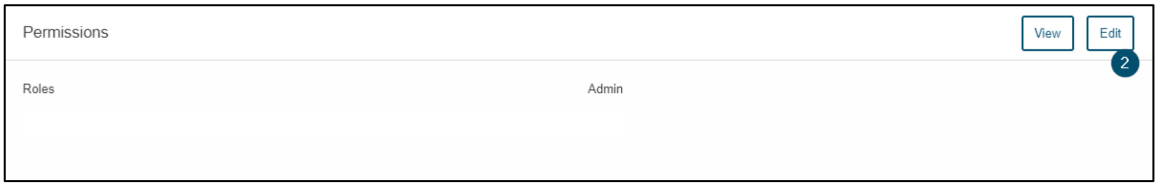
15. Type the provider's **first name**.
16. Type the provider's **last name**.
17. Type the provider's **email address**.
18. Select the provider's **salutation**.
19. Select the provider's **gender**.
20. Select the provider's **birthday**.
21. Select the provider's **language** preference.
22. Select the provider's **timezone**.
23. Leave "**Admin**" as unchecked.
24. 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

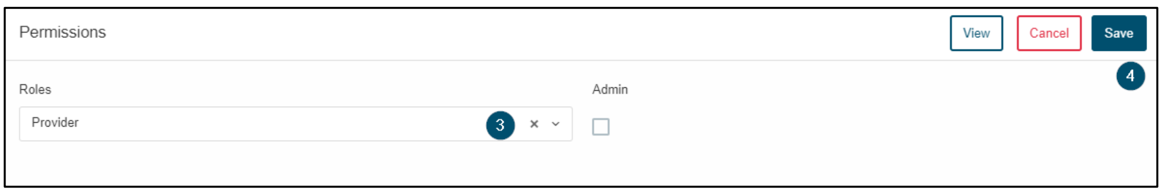
7.3 User Roles

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:

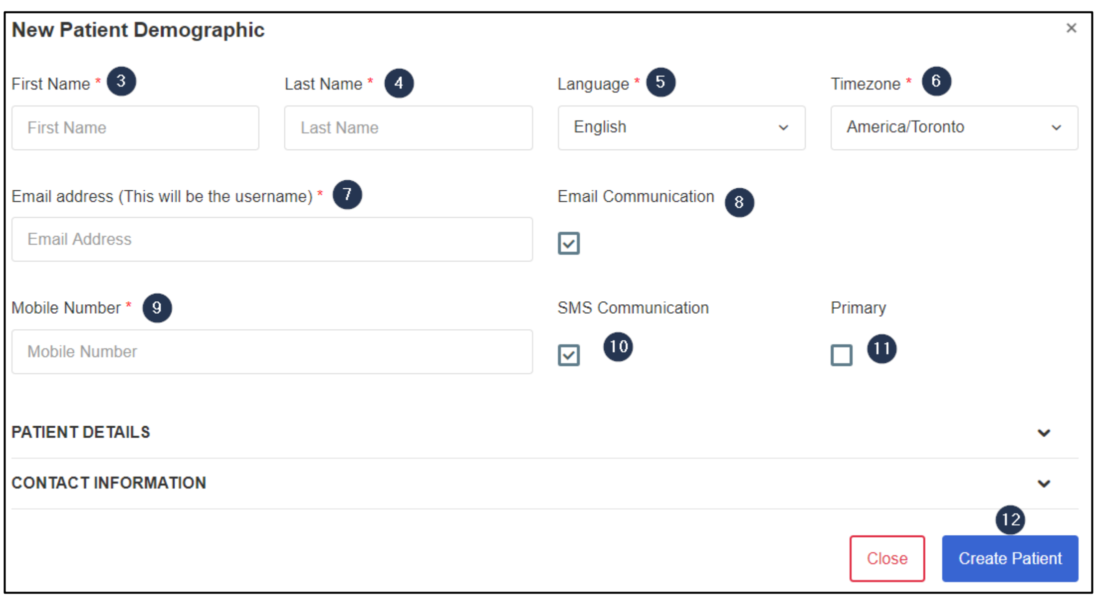
- All Patients
- My Patients
- When creating an appointment

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:



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.

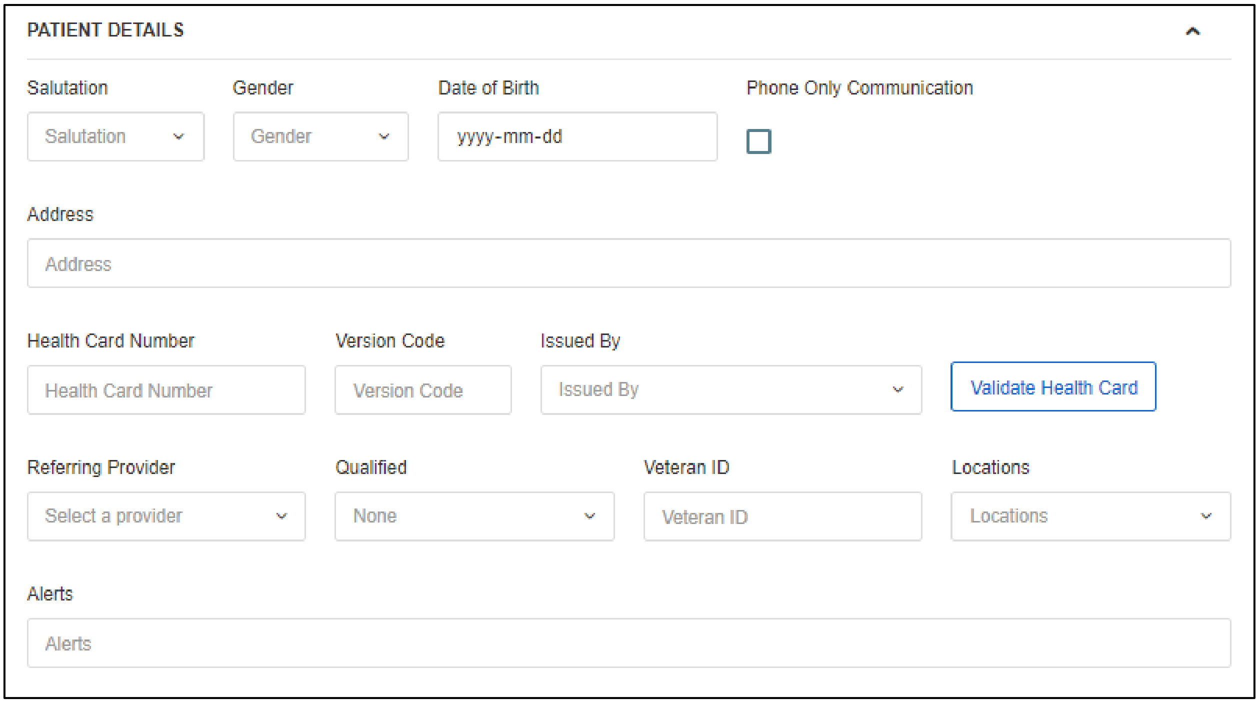
11. Select **Primary** if the entered mobile number is the patient's **Primary Number.**
12.

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.

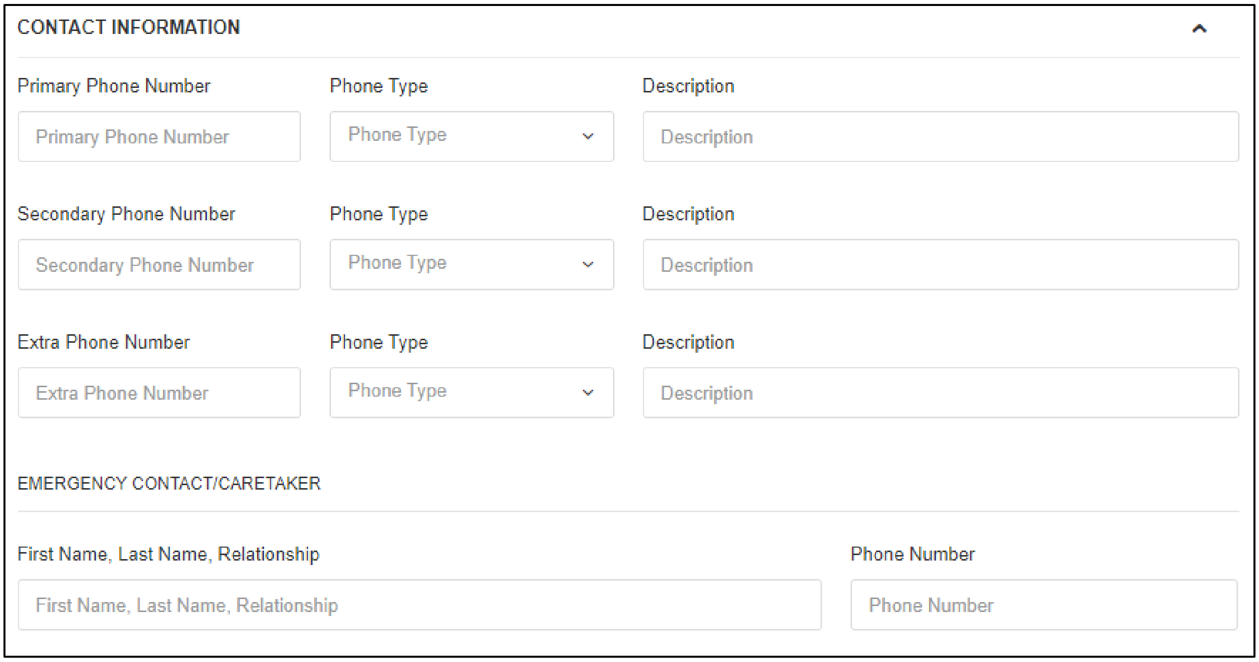
Advanced Patient Settings

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.



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.



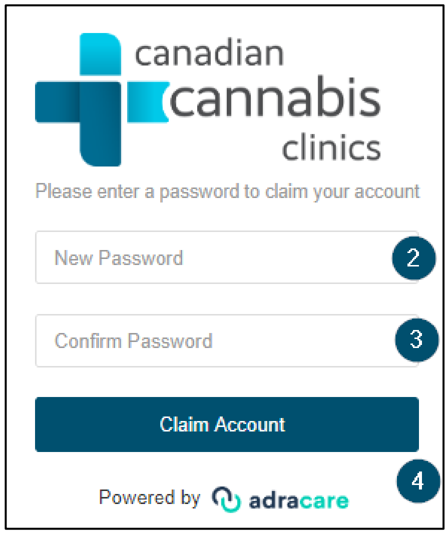
14. Add additional patient **contact numbers**.
15. Add a **patient's emergency contact** information.
16. When finished filling out the desired fields, click "**Create Patient**" to create the patient profile.

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.

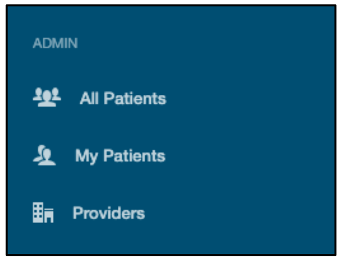


2. Type the new **password**.
3. Re-type **Step 2** to confirm the **password**.
4. Click the "**Claim Account**" button to activate the account.

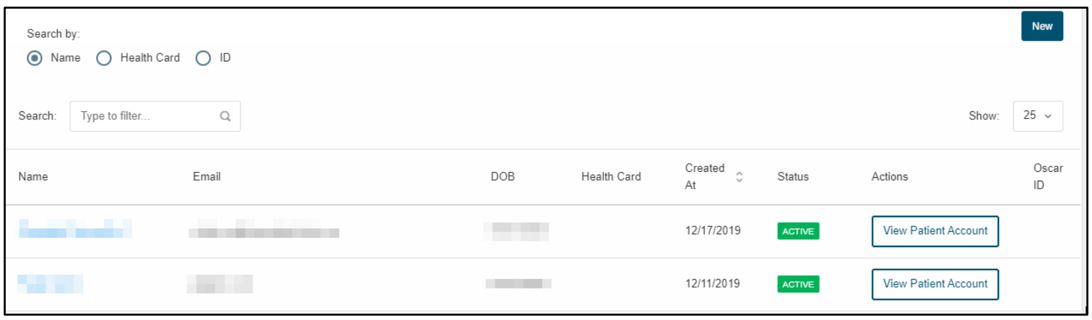
Note: If the user did not receive an email, you can have them to check their Junk/Spam folder before re-sending the email.

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

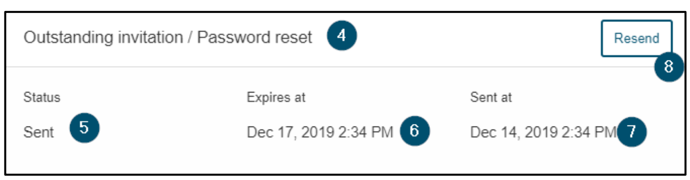
If the user does not claim the account within 72 hours or the original email cannot be found, the administrator can re-send the email invitation.



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.

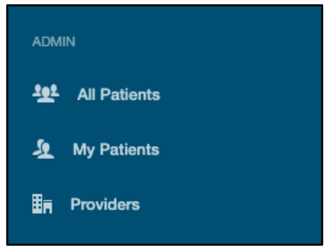


4. Go to the **Outstanding invitation / Password reset** component.
5. Check if the **status** of the invitation is "*Sent*" or "*Expired*":
   - Sent: Invitation was sent and is still valid
   - Expired: Invitation was sent and is not valid
6. The **time** the invitation will **expire**.
7. The **time**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

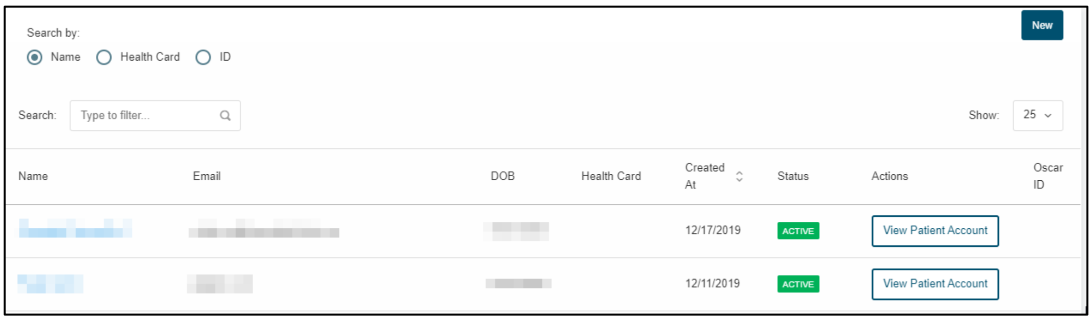
Statuses defined

- **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

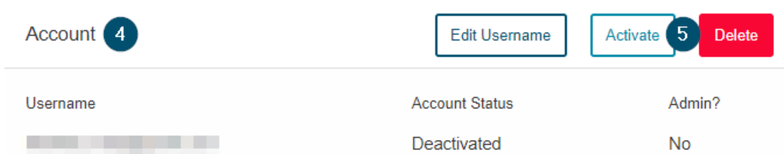
7.7 Activating a User Account



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



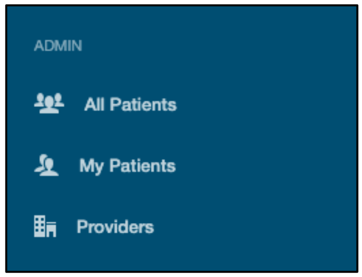
2. Confirm that the **status** of the user is "*Initialized*" or "*Deactivated*".
3. Under **Actions** column, click on the **View Patient Account** button.



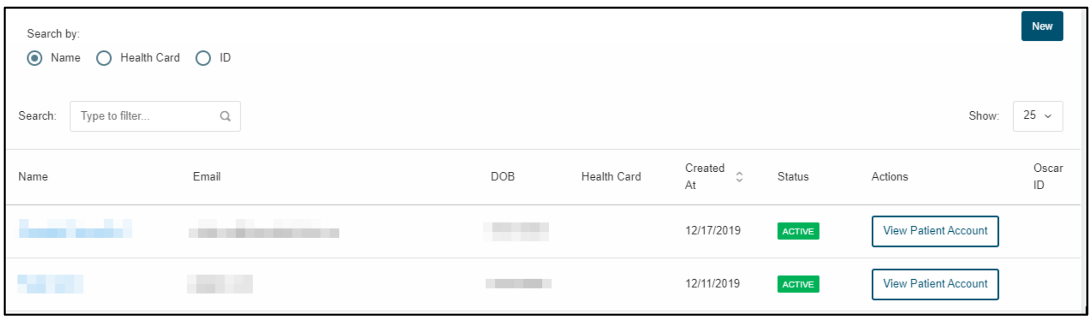
4. Go to the **Account** component.
5. Click **Activate**.
6. The user's status will be updated to **Activated**.

7.8 Deactivating a User Account

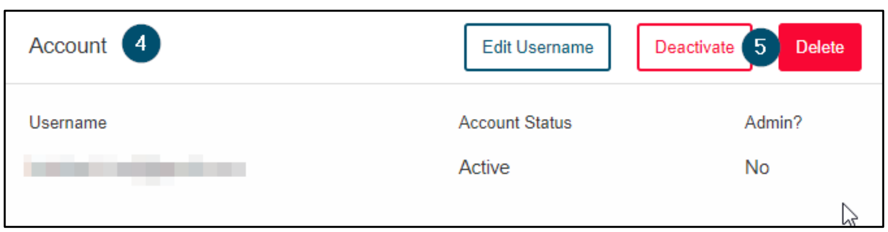
Should a user be no longer authroized to access the platform anymore, you can deactivate the account to block their access.



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.

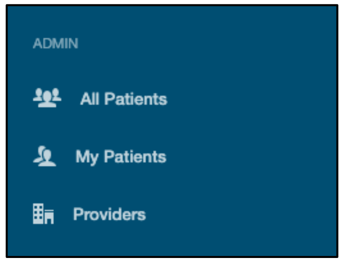


4. Go to the **Account** component.
5. **Deactivate** the account.
6. The user's status will be updated to **Deactivated**.

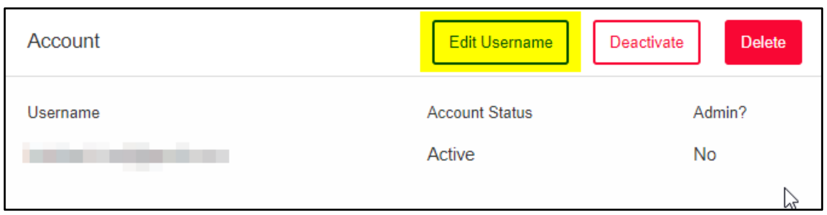
7.9 Changing a Username

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

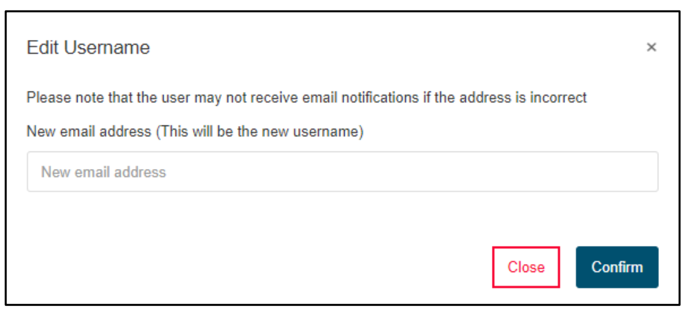
1. Confirm the old username of the user.
2. Confirm the user's new email address.



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



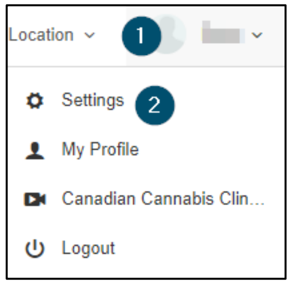
i. Click "**Edit Username**".



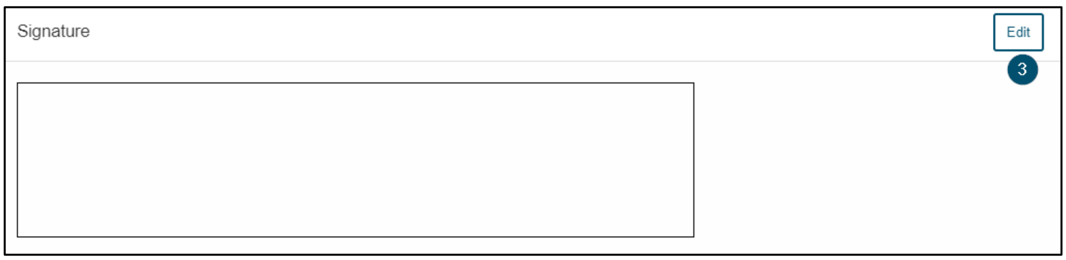
ii. Input the **new email** in correctly.
iii. **Confirm** the **new email**.
iv. Have the user **log out and log in** with the new email.
v. The password should be the same.
vi. Advise the user to change their password, if needed.

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**).

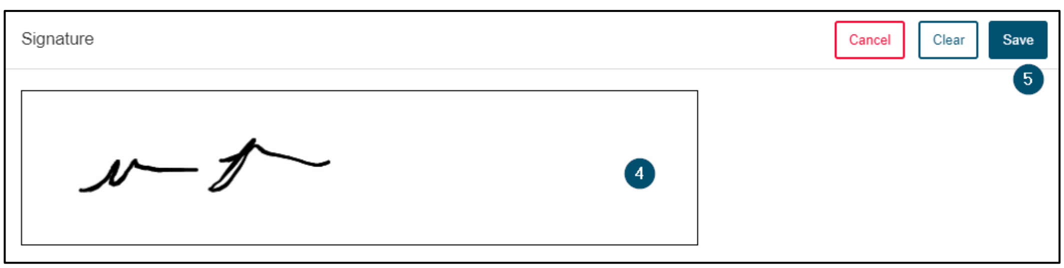
7.10 Creating a Signature



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



3. Click "**Edit**".

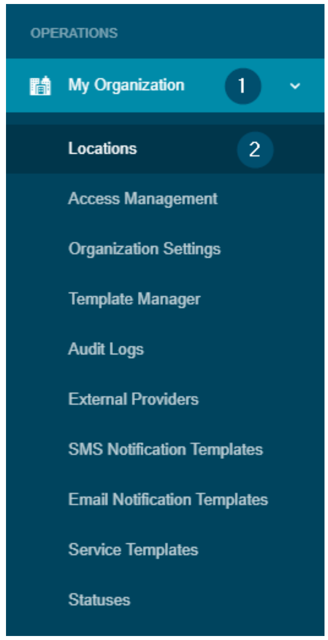


4. Use a mouse to **sign** within the box.
5. Click "**Save**".

8 Organization Setup

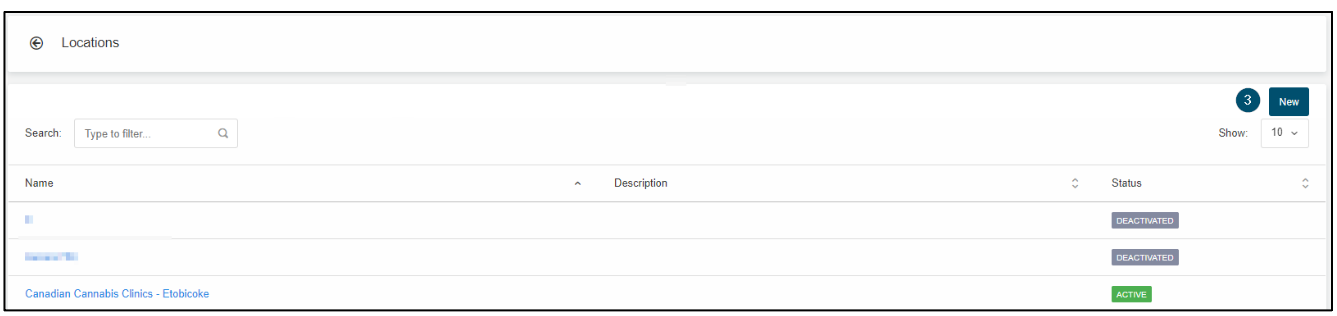
8.1 Locations

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

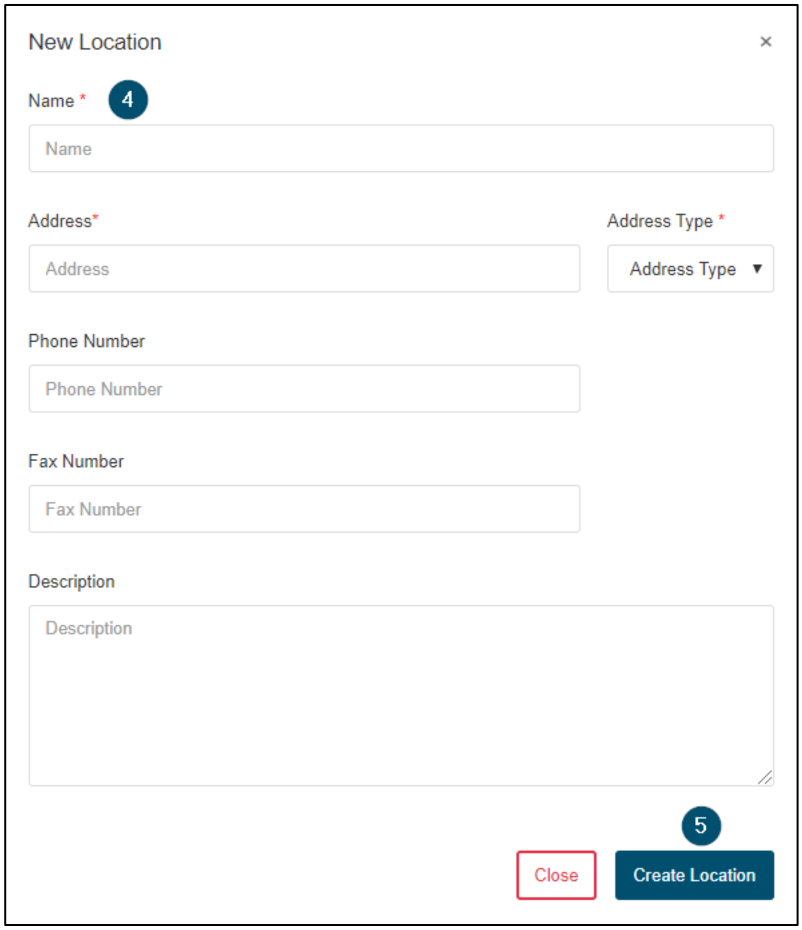


1. Click on “**My Organization**”.
2. Click “**Locations**”.

8.1.1 Add a new location



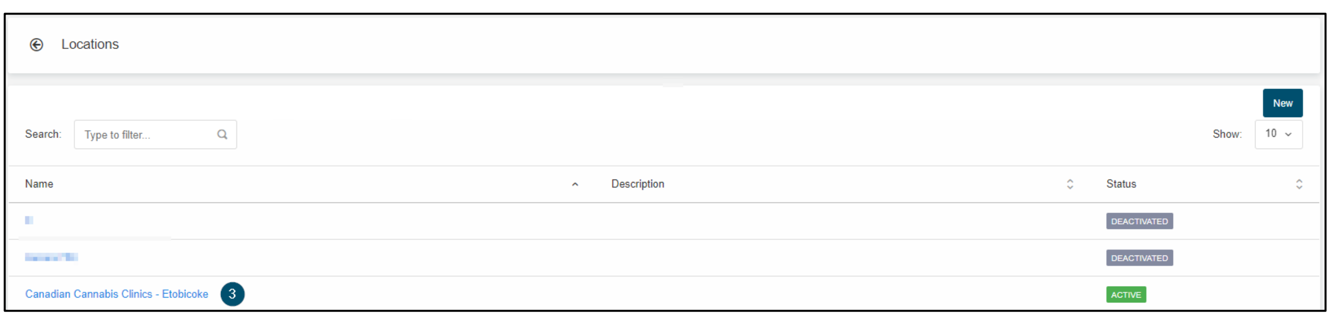
3. Click “**New**”.



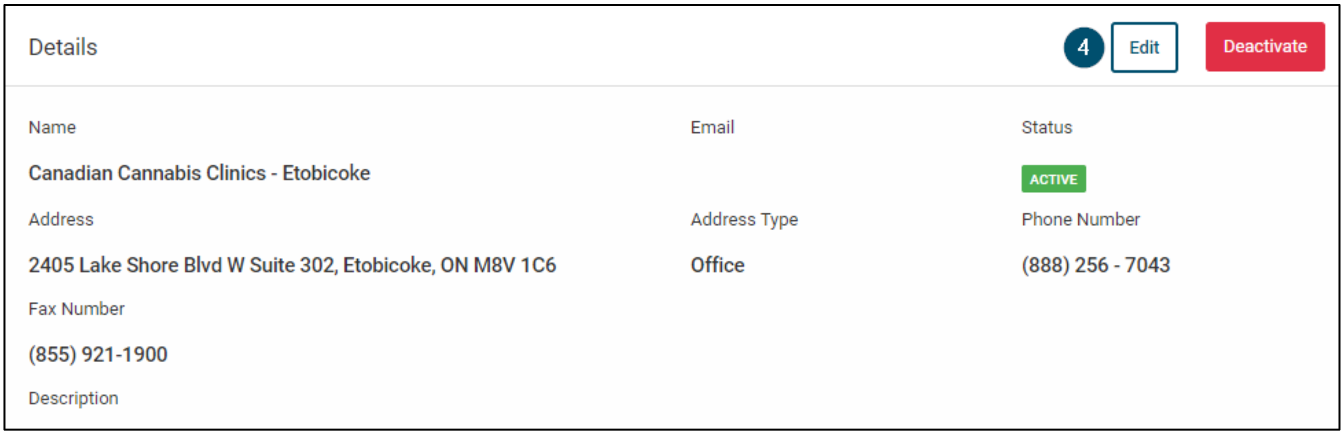
4. Complete details for the location.
5. Click “**Create Location**”.

8.1.2 Edit an existing location

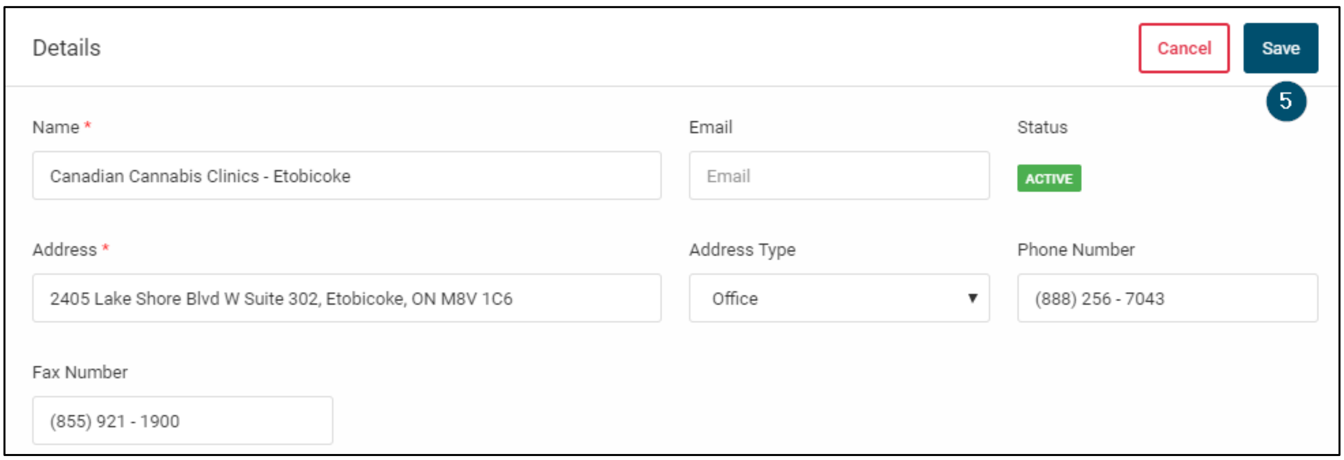
After loading the list of locations by following steps 1 and 2 from section 9.1



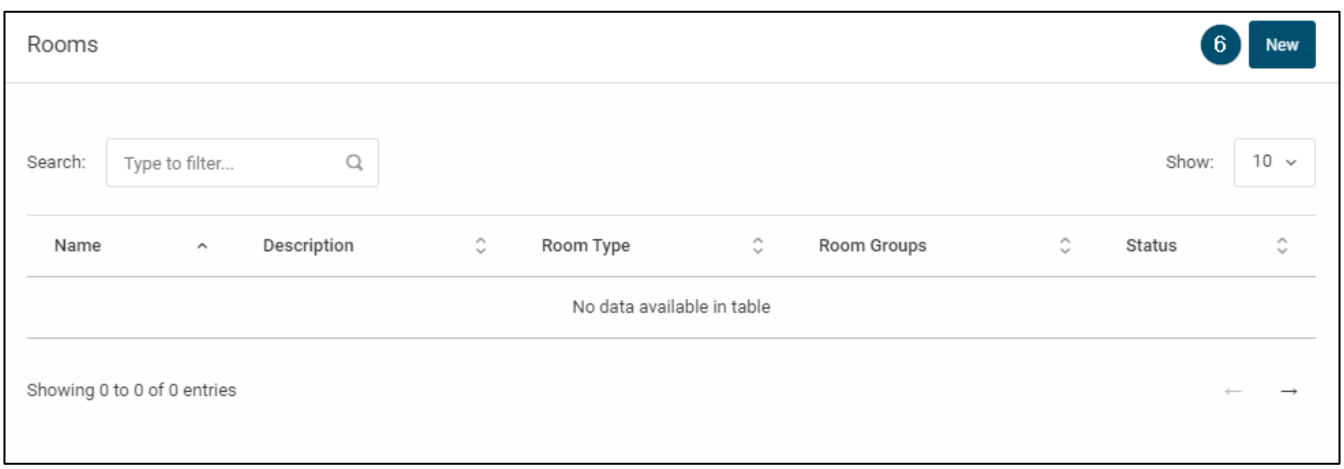
3. Click on a location name to edit.



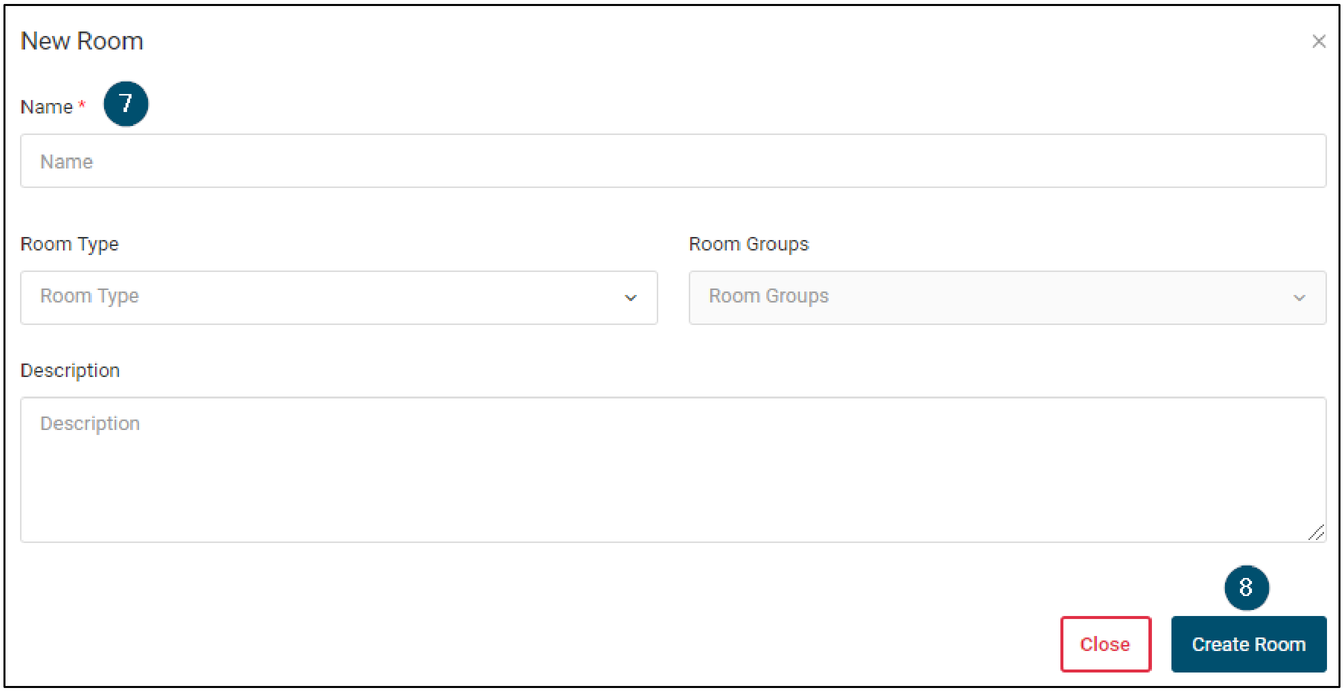
4. Click on Edit.



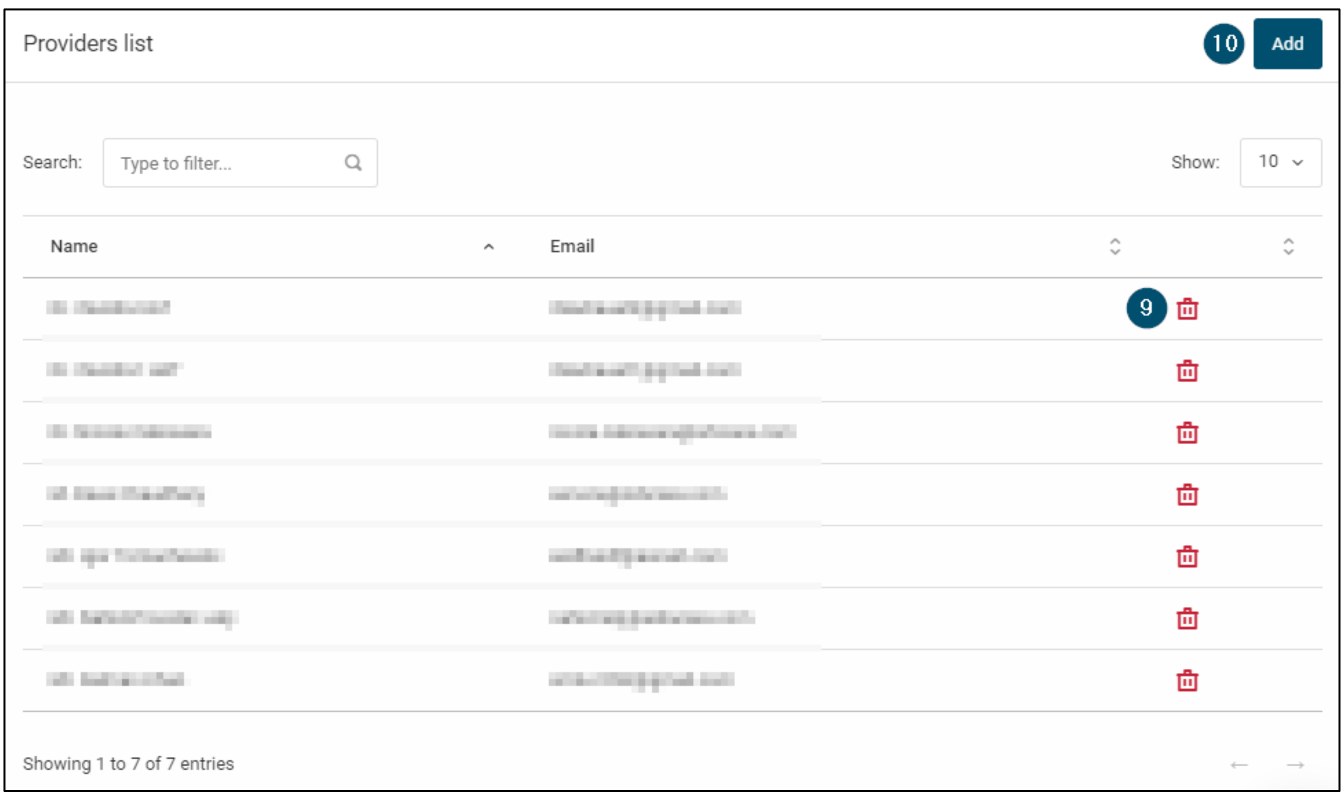
5. After modifying the location details click "**Save**".



6. Click "**New"** to add a new room to the location (if required).



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

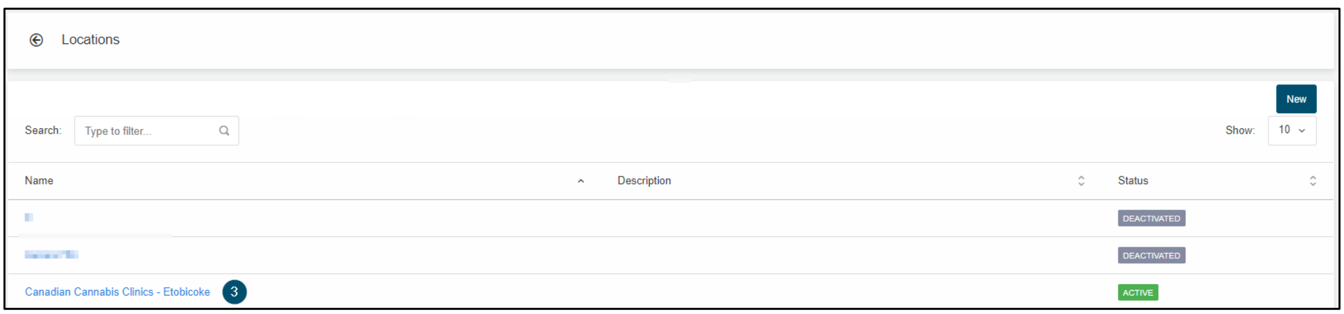


9. Click the trash bin icon to remove a provider from the location.
10. Click "**Add**" to add a provider to a location.

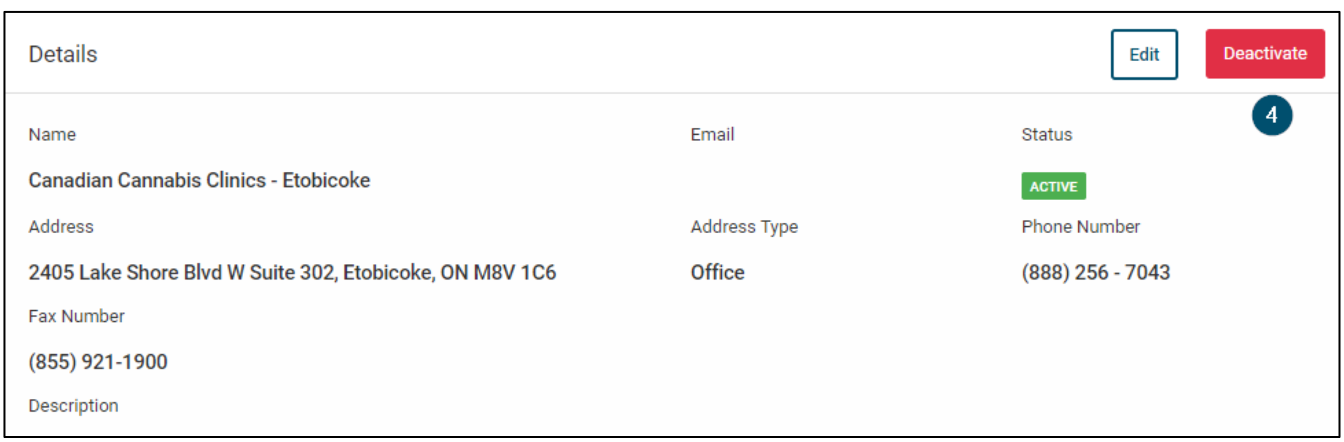
11. Select a provider from the dropdown list.
12. Click "**Confirm**".

Deactivate a location

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



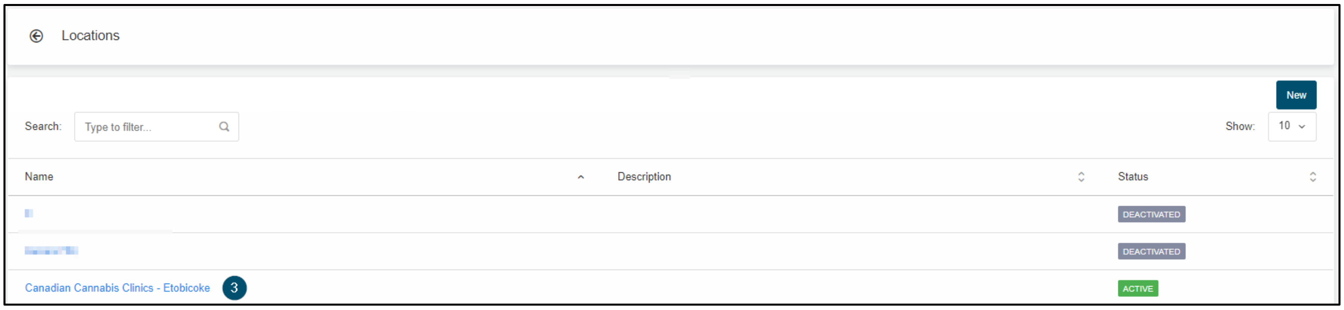
3. Click on a location name to edit



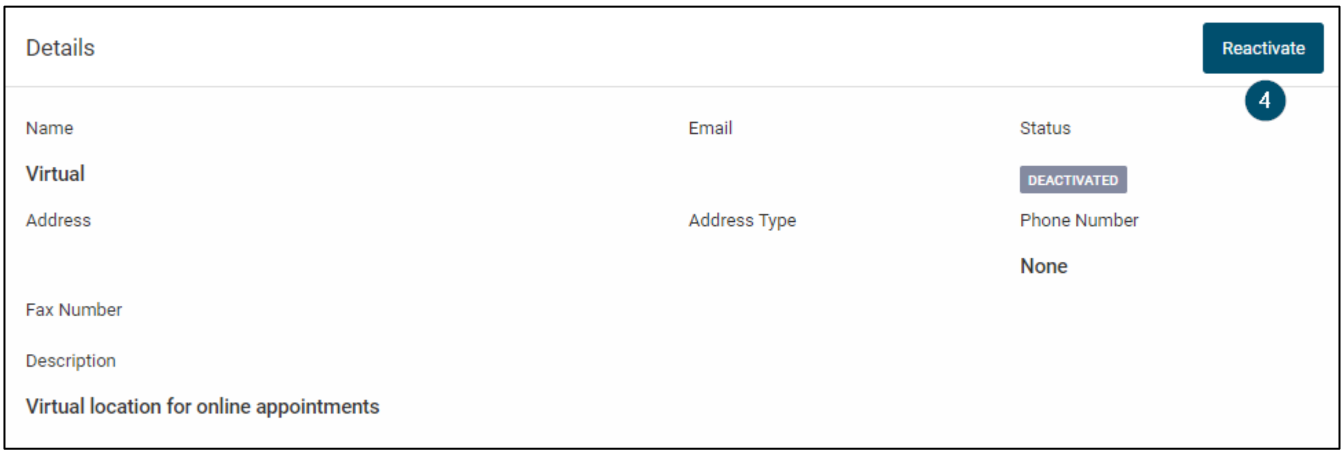
4. Click "**Deactivate**" to deactivate the location.

Activate a location

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



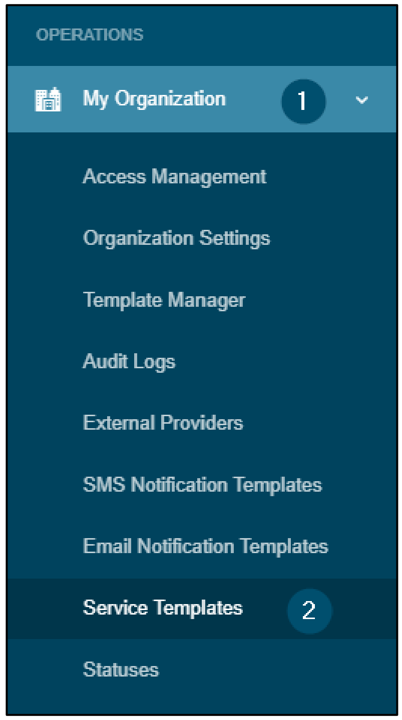
3. Click on a location name to edit.



4. Click “**Reactivate**” to reactivate the location.

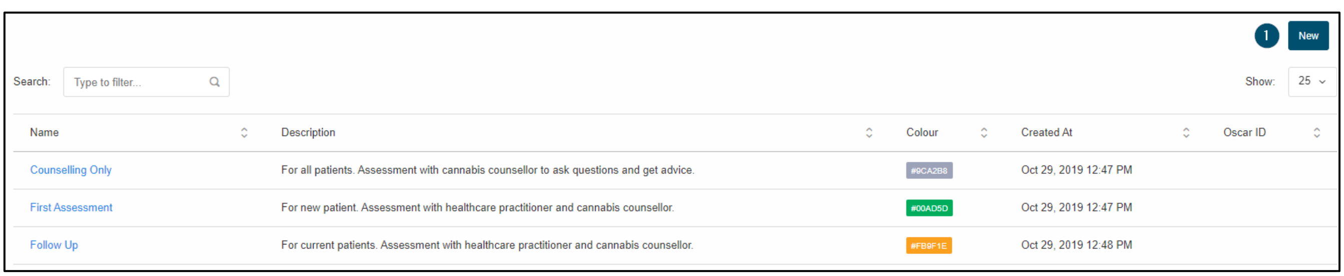
8.2 Service Templates

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

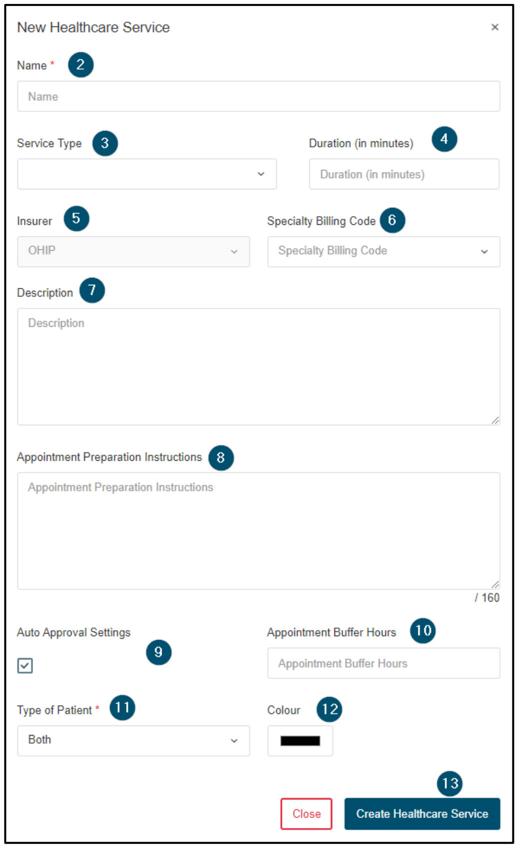


1. Click on “**My Organization**”.
2. Click “**Service Templates**”.

8.2.1 Adding a Service Template



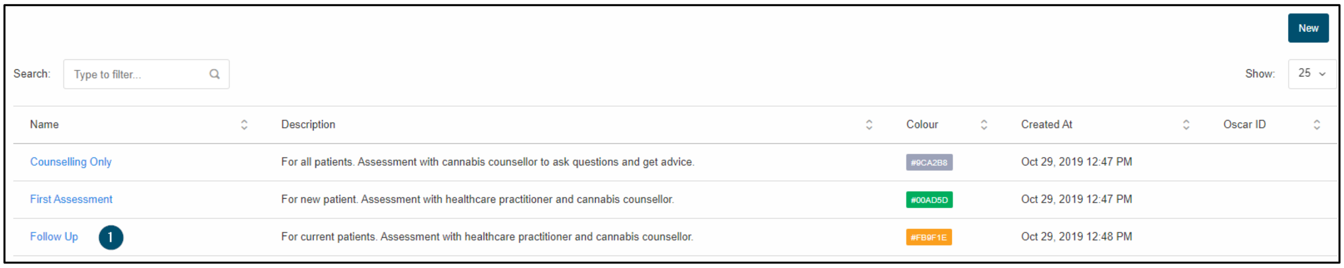
1. Click “**New**” to open the “New Healthcare Service” modal.



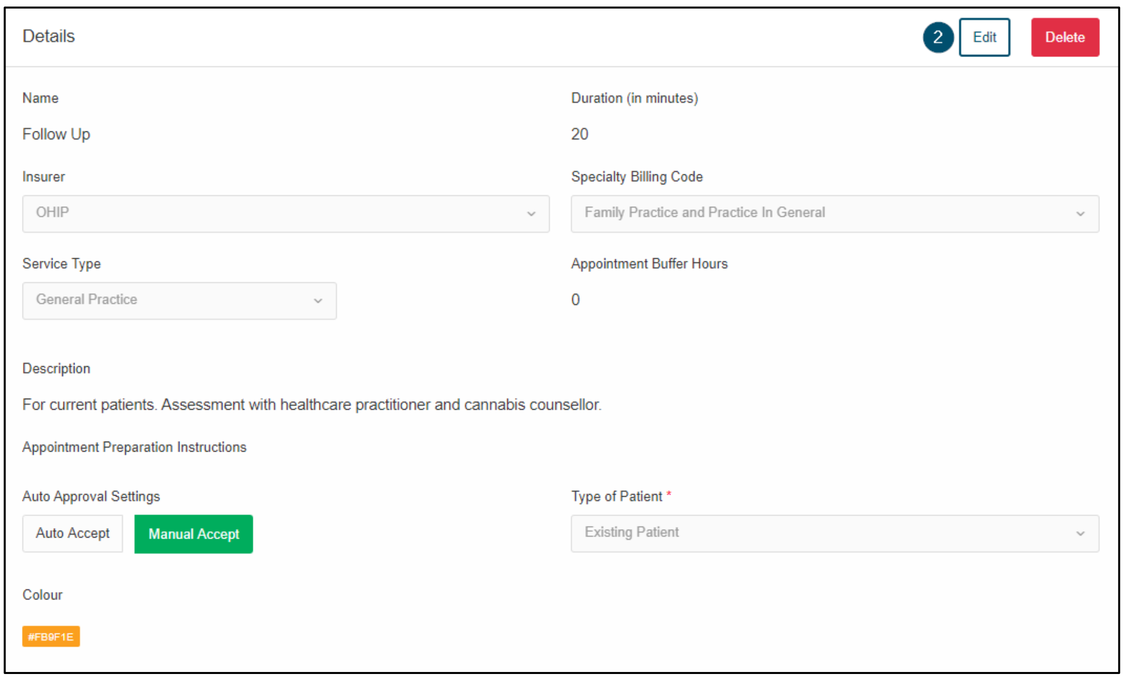
2. Type the name of the **healthcare service**.
3. Select a **service type** that relates to the healthcare service.
4. Type the **duration** of the healthcare service.
5. Select an **insurer** as applicable.
6. Select a **specialty billing code** as applicable.
7. Type a **description** of the healthcare 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



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

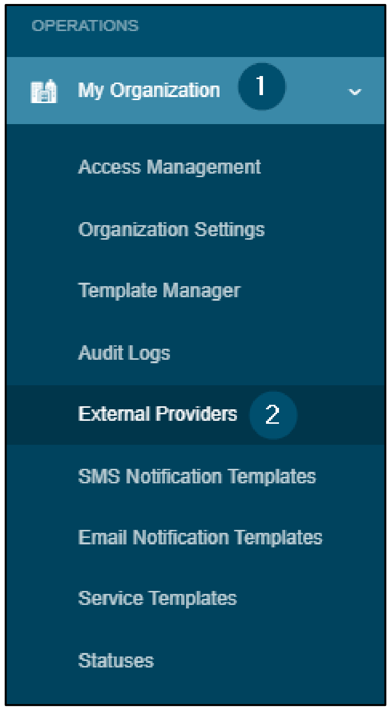


2. Click “**Edit**” and make changes to the healthcare service information.
3. **Save** your changes.

8.3 External Providers

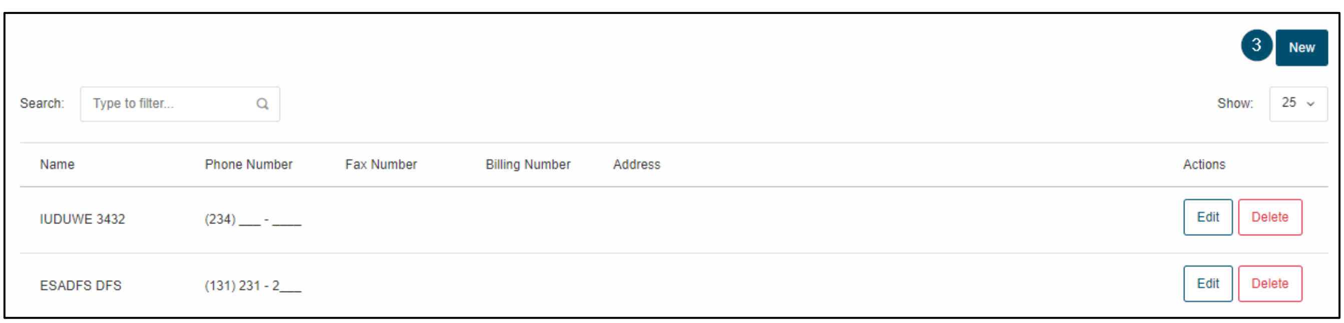
The External Providers section is used to manage all referring providers.

To access the list of referring providers:

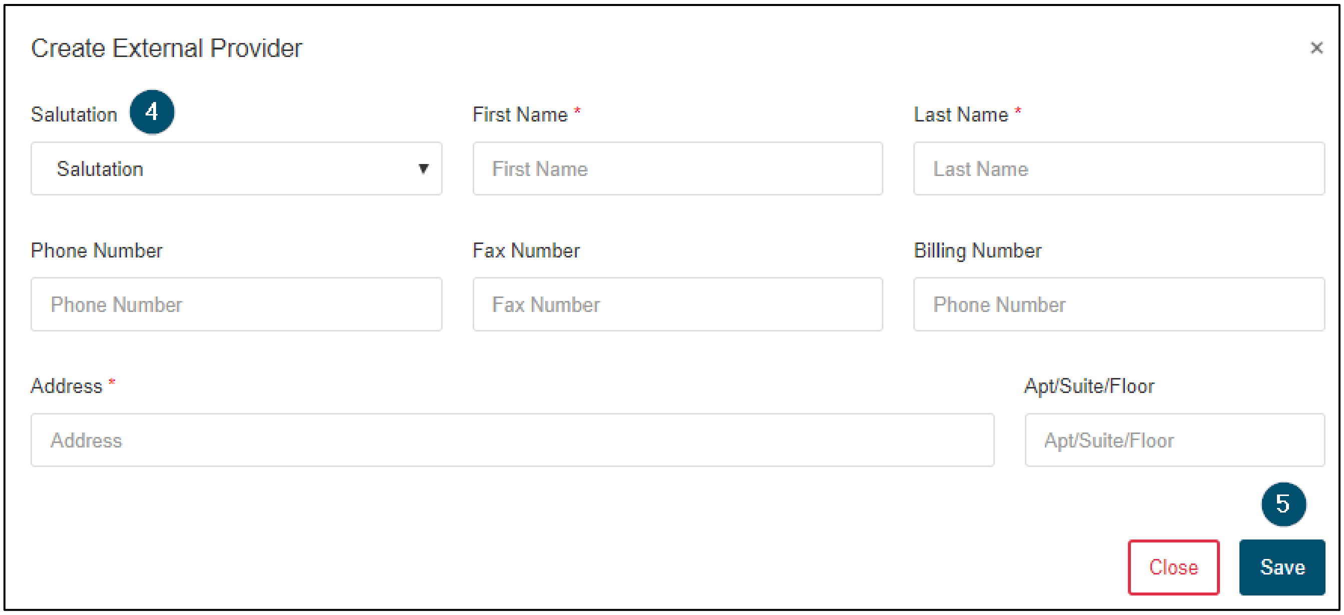


1. Click “**My Organization**”.
2. Click “**External Providers**”.

8.3.1 Add a new provider

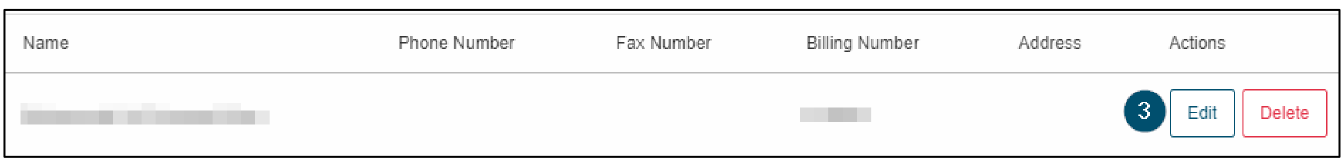


3. Click “**New**”.

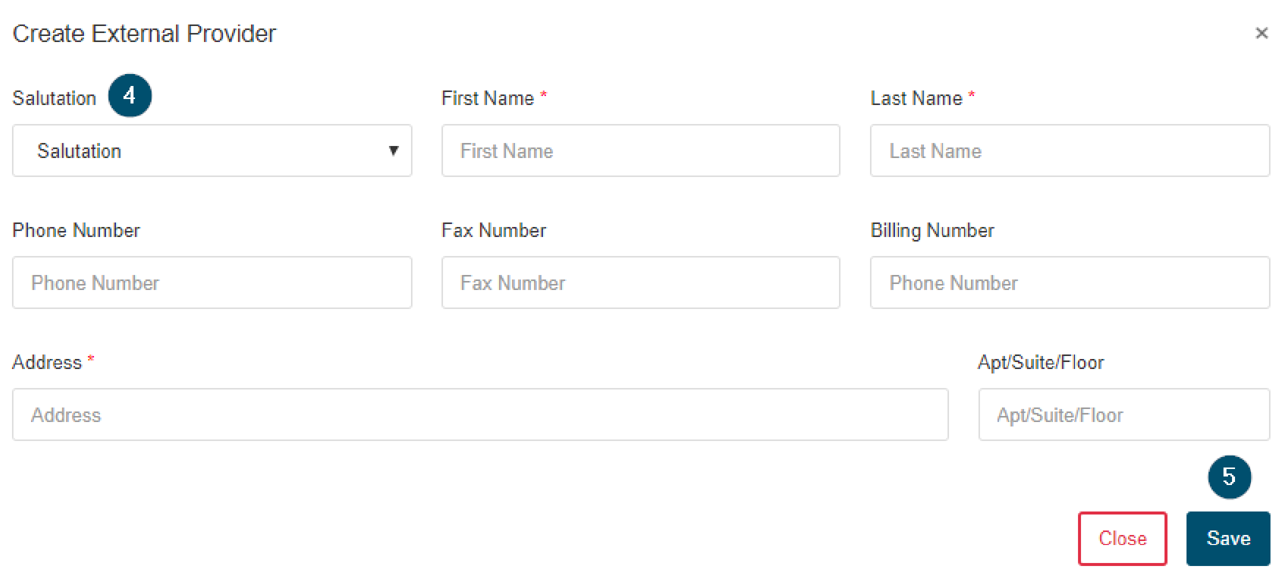


4. Complete all the referral provider's information.
5. Click "**Save**".

8.3.2 Edit an existing provider

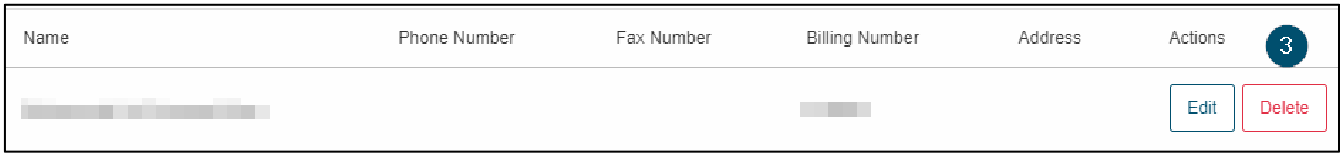


1. Click "**My Organization**".
2. Click "**External Providers**".
3. Click "**Edit**".

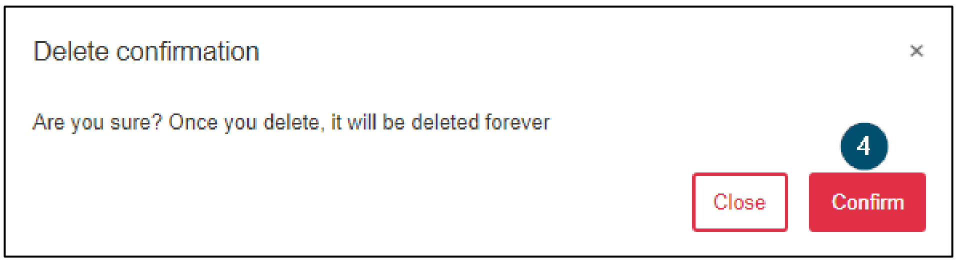


4. Modify provider information.
5. Click “**Save**”.

8.3.3 Delete an existing provider



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*

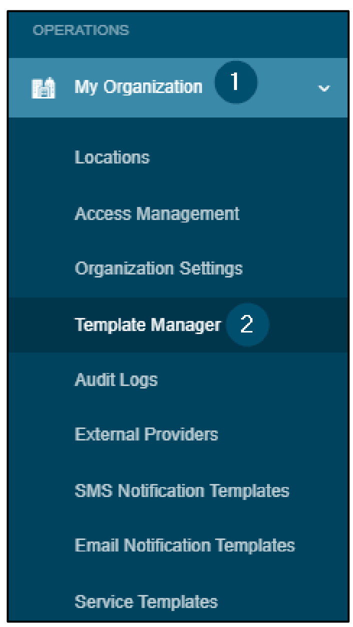
Physician availability can be scheduled within the calendar.
To access availability from the calendar:

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:



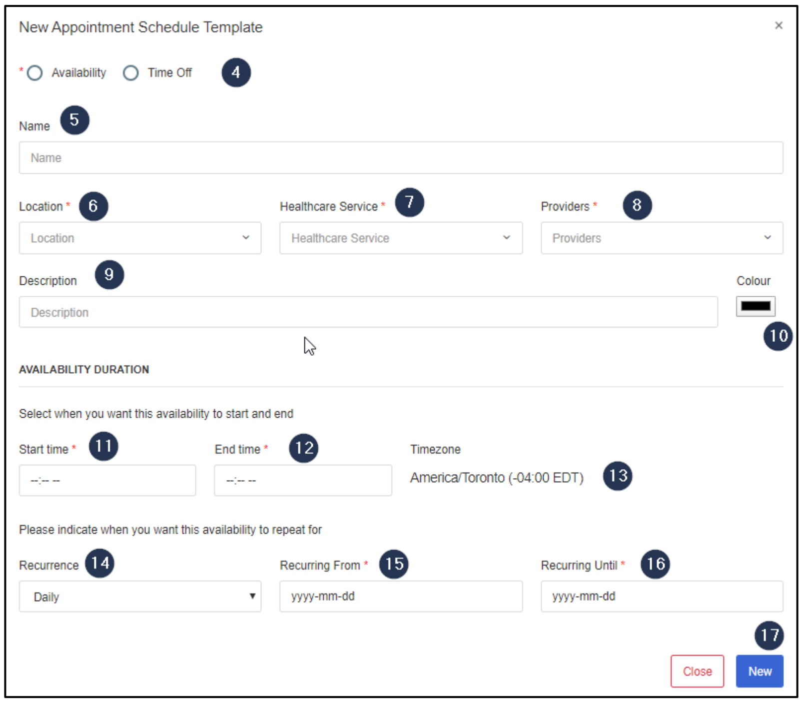
1. Click "**My Organization**".
2. Click "**Template Manager**".

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**".

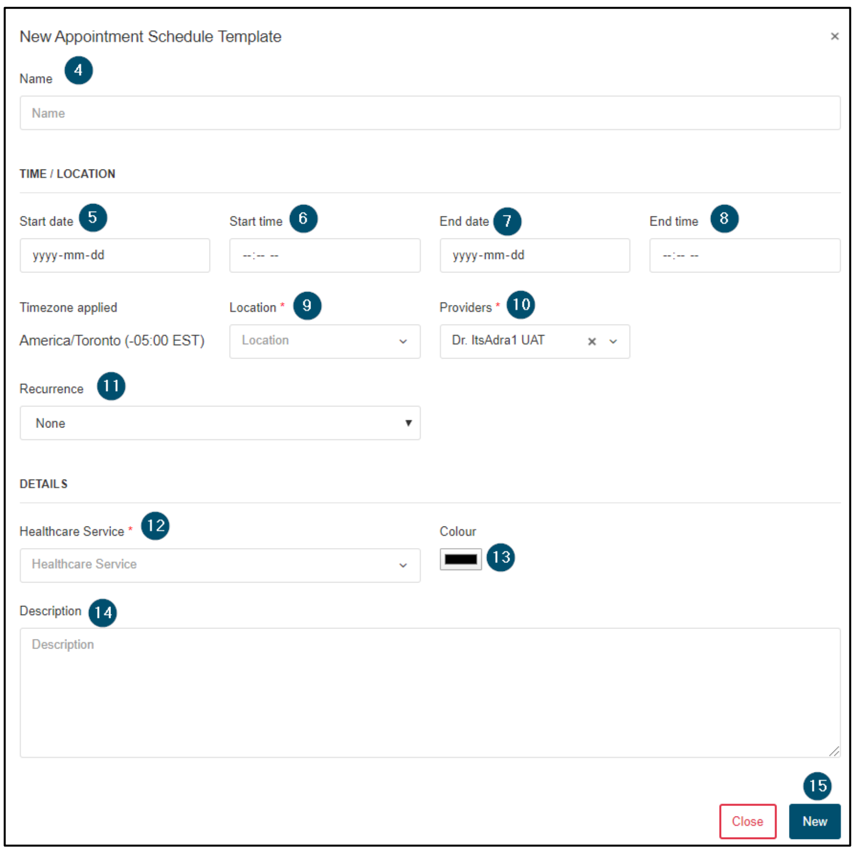


4. Select the **type of schedule template** to create:
    a. **Availability** – Opens slots for provider availability
    b. **Time Off** – Blocks time on the schedule for breaks or time off
5. Type a **Name** for the schedule template.
6. Select a **Location**.
7. Select a **Health Care Service** to 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

3. Click "**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.

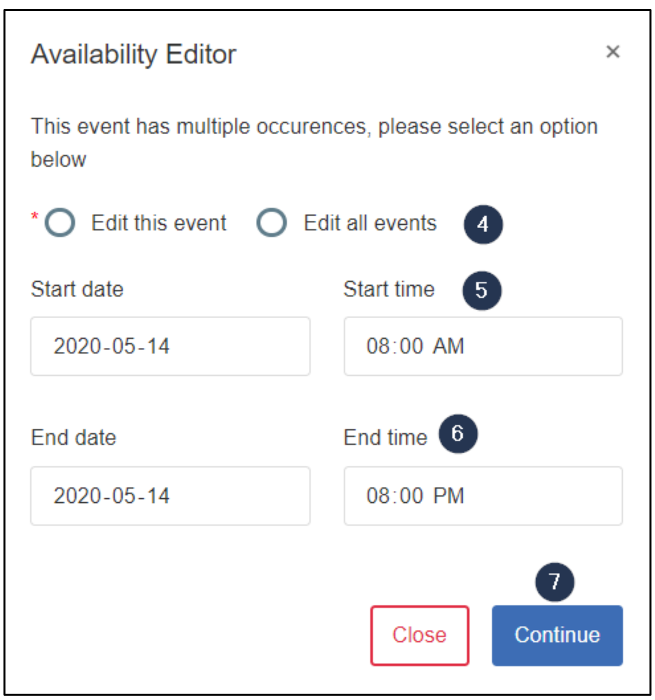
Note: Start date/time and end date/time should be within the same day and then **Recurrence** should be used to identify the recurrence of the schedule template.

8.4.2 Edit an existing schedule template

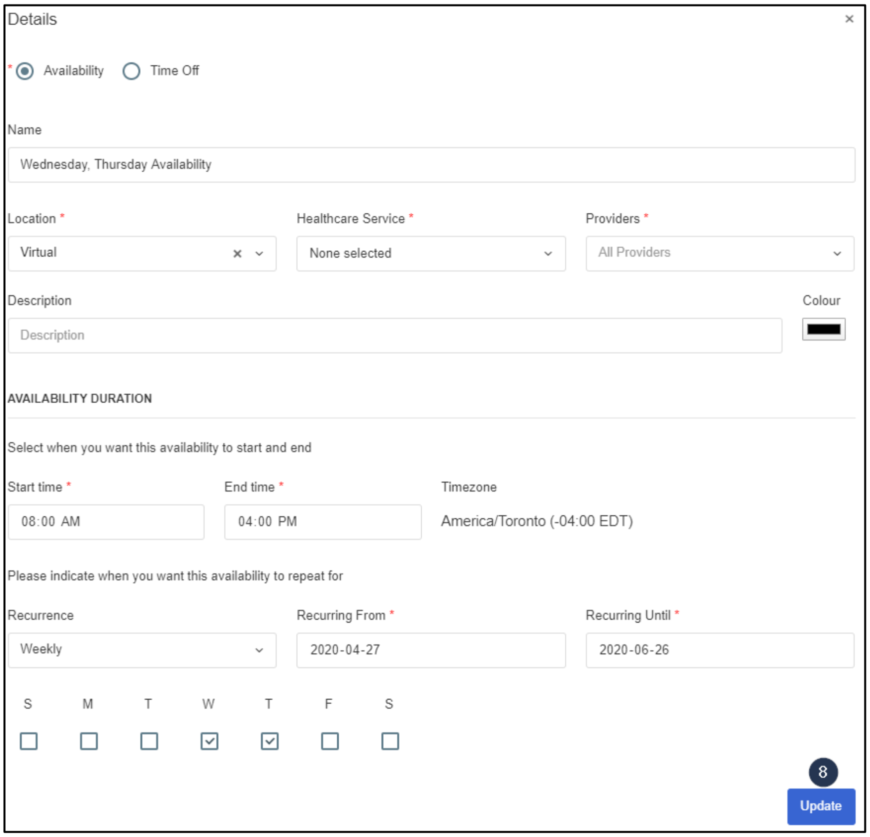
Calendar Availability Method

1. Click "**Calendar**"

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



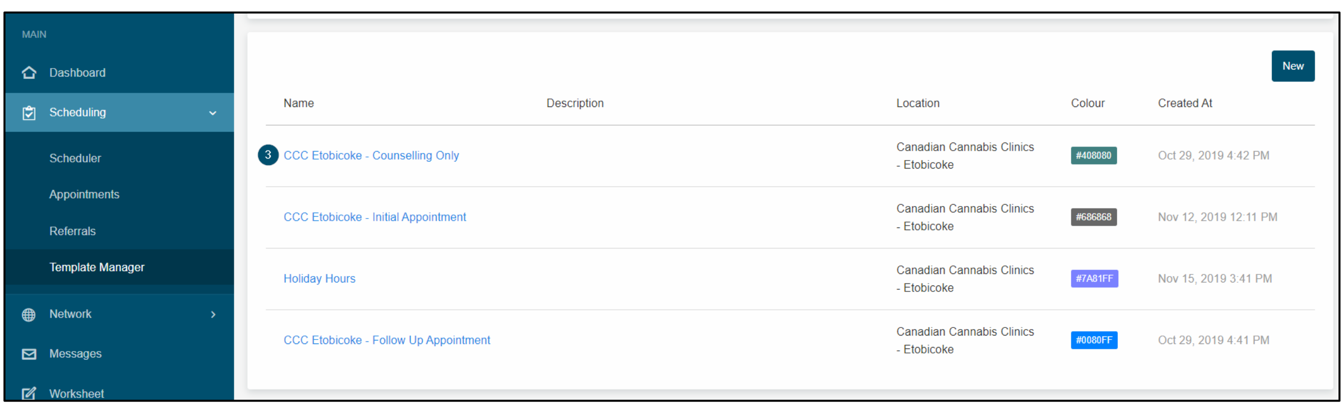
4. Select if you would like to "**Edit this event**" or "**Edit all events**"
5. Modify the "**Start date**" or "**Start time**" (if applicable)
6. Modify the "**End date**" or "**End time**" (if applicable)
7. Click "**Continue"** (If "**Edit all event**" is selected please proceed to step 8)



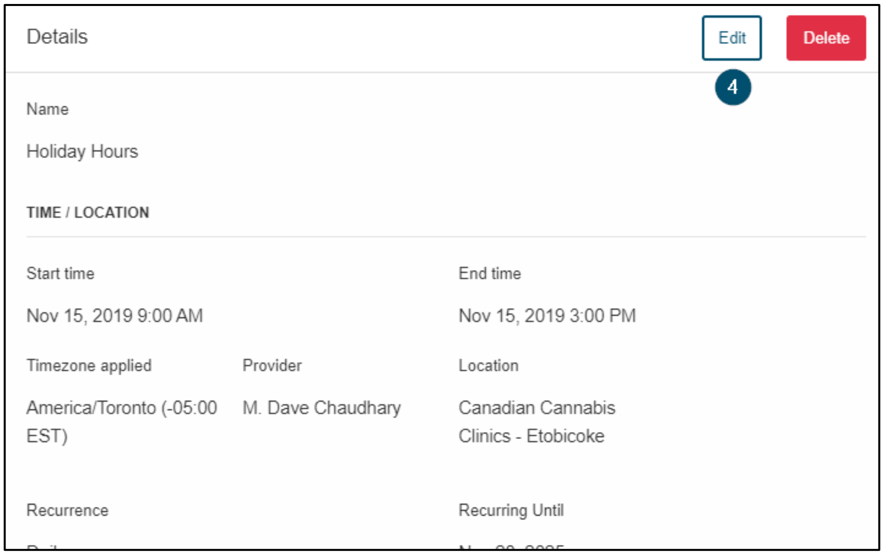
8. Edit the template as needed and then click "**Update**".

Template Manager Method

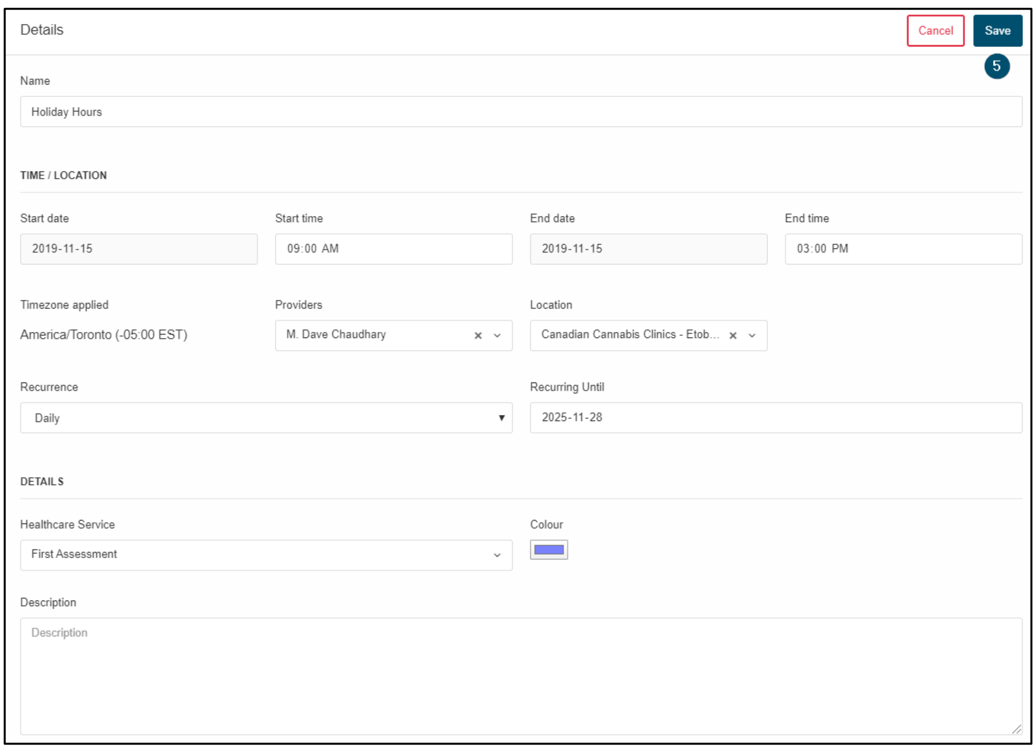
1. Click "**My Organization**".
2. Click "**Template Manager**".



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



4. Click “**Edit”.**



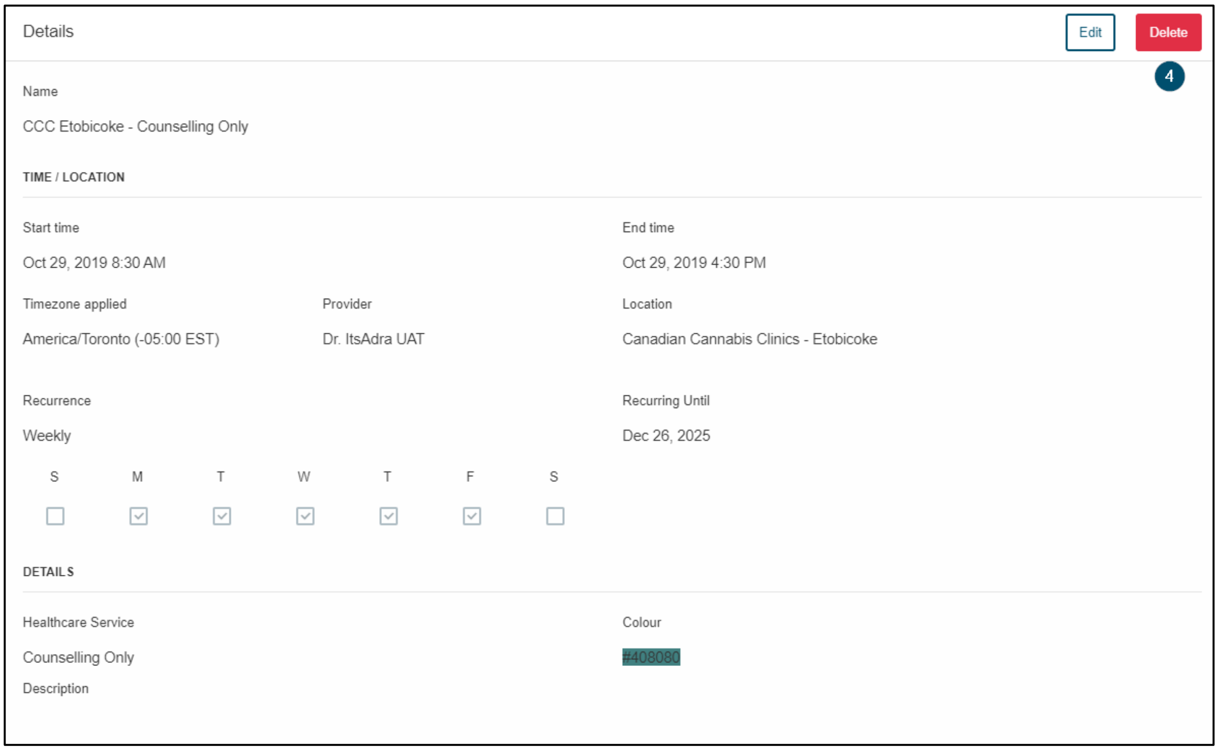
5. Edit the template as needed and then click “**Save”**.

8.4.3 Delete an existing schedule template

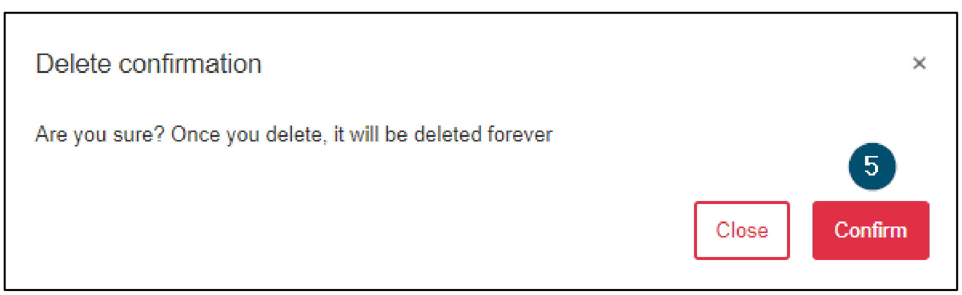
1. Click “**My Organization**”.
2. Click “**Template Manager**”.

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.



4. Click "**Delete**".



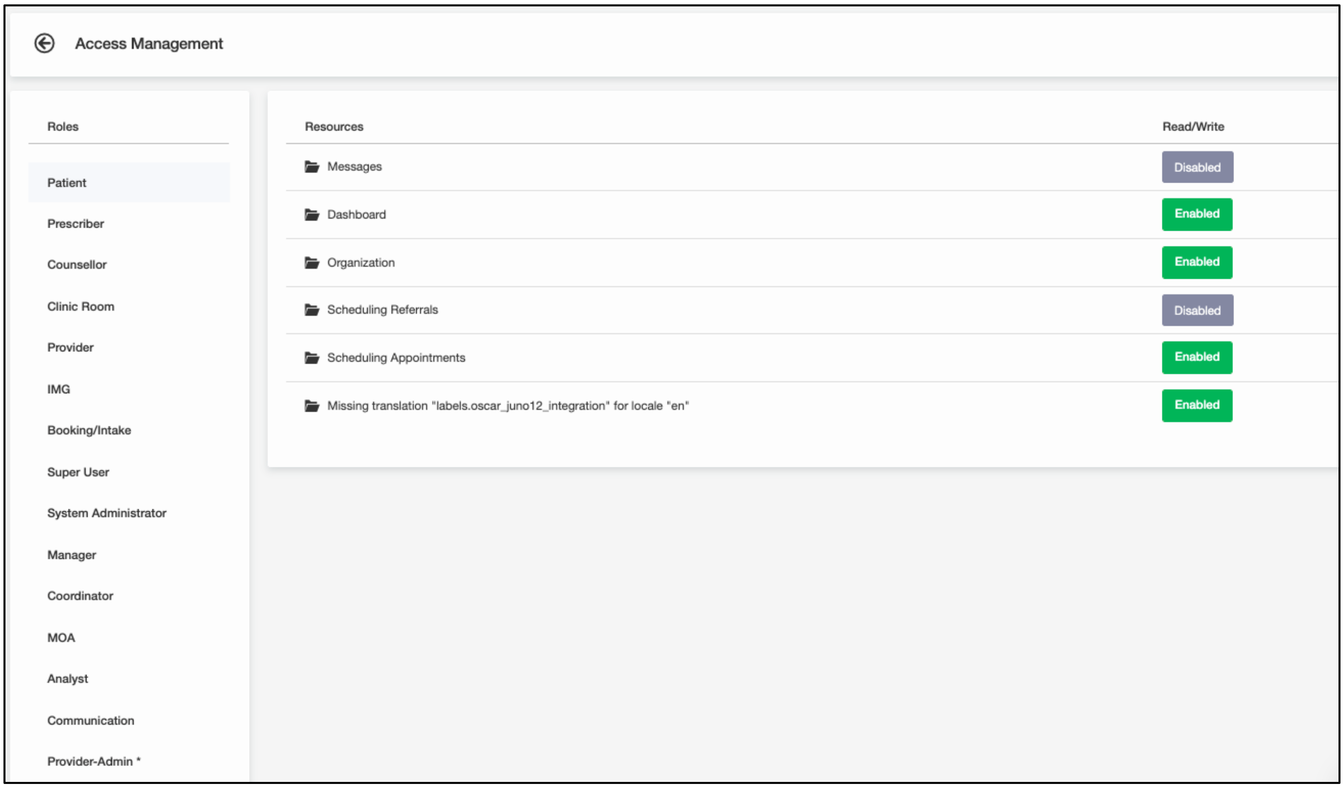
5. Click "**Confirm**" to delete the schedule template.

8.5 Access Management

8.5.1 View user roles

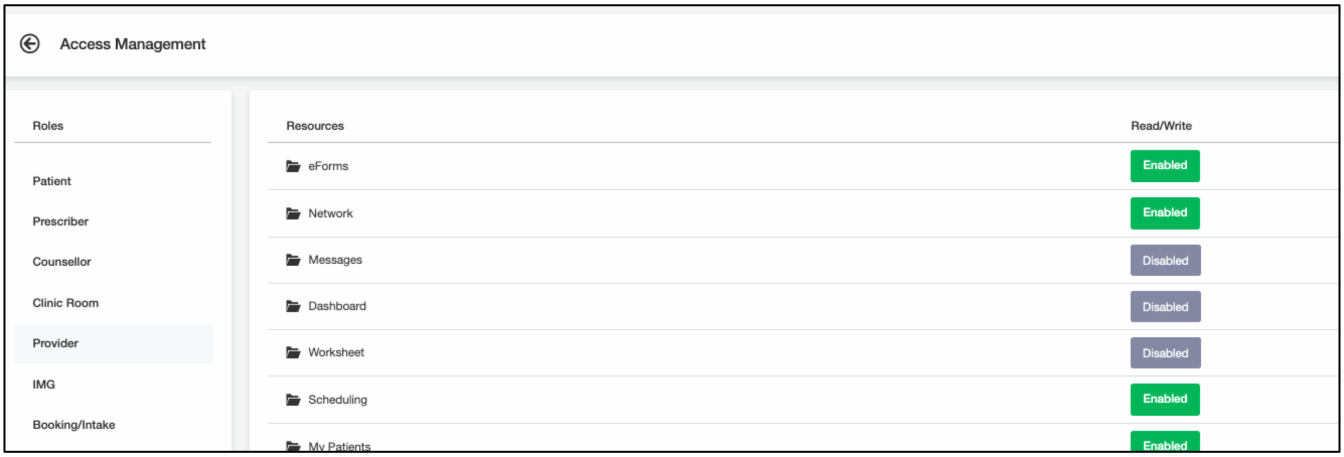
System administators have access to modify permissions to existing user roles.

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



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

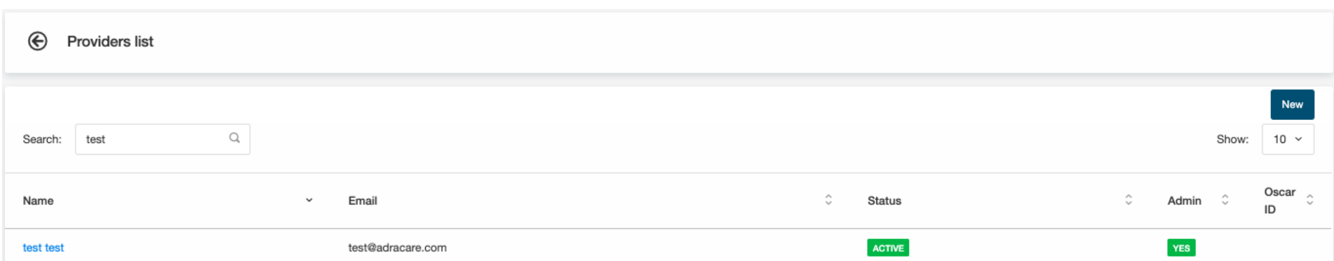
8.5.2 Edit user roles



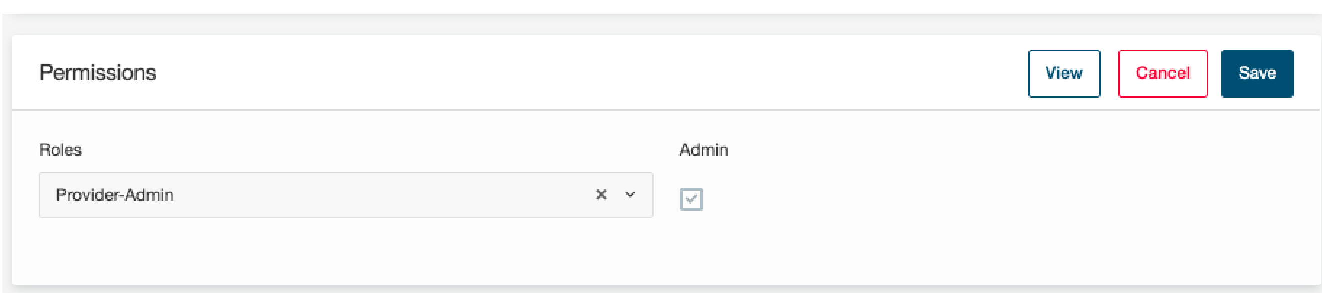
1. On the left panel, select one of the **user roles** to which you want to make changes.
2. Click on either "**Enabled**" or "**Disabled**" in the Read/Write column to activate or deactivate the resource for that user role. All changes automatically save.

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

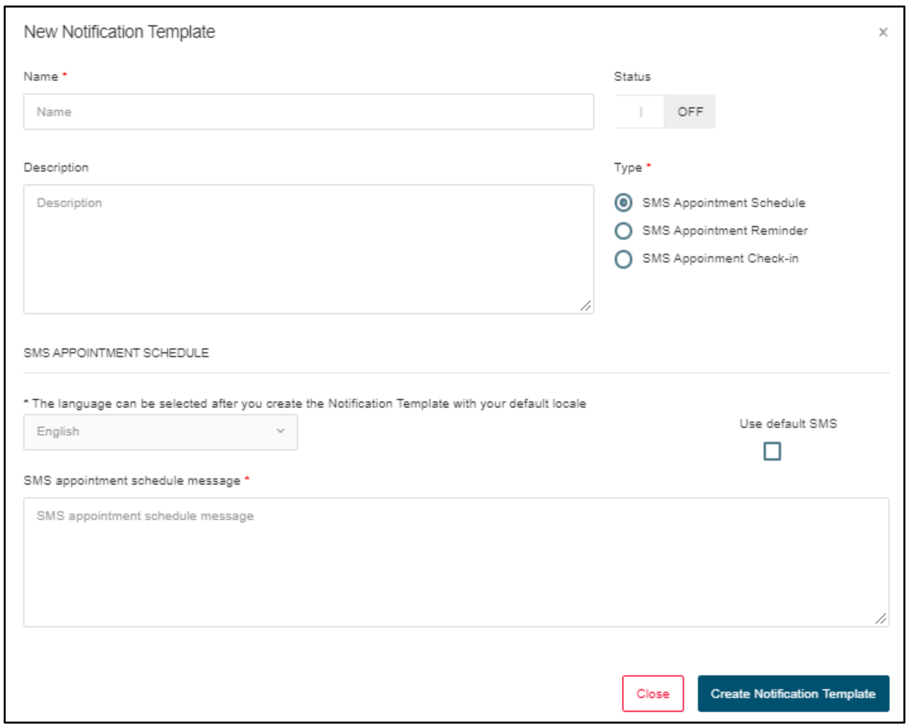
8.7.1 SMS Notifications

Administrators can change the notification text for SMS notifications.

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

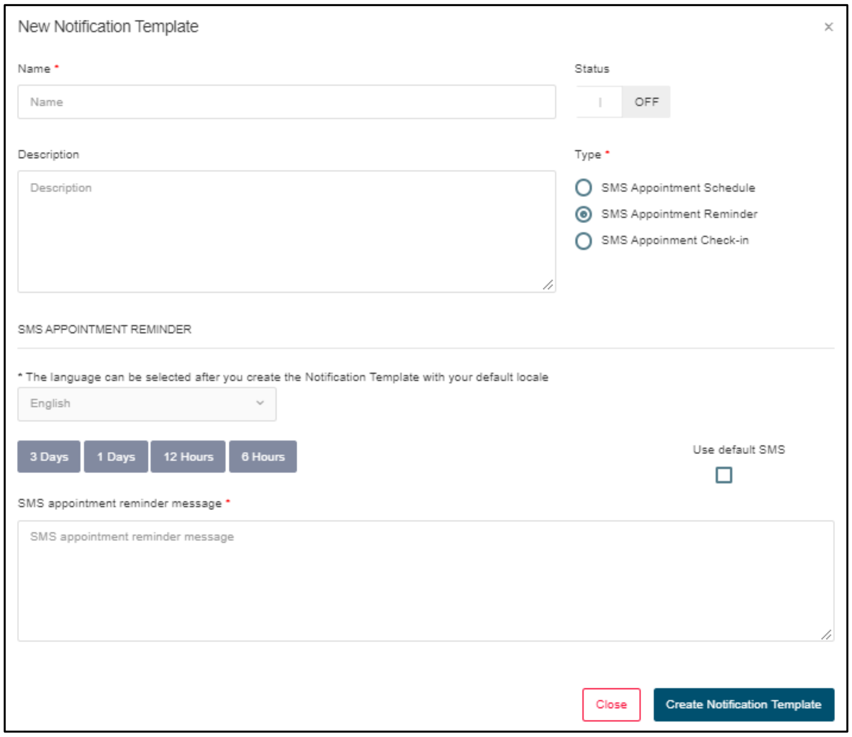
Adding SMS Notifications

SMS Appointment Schedule



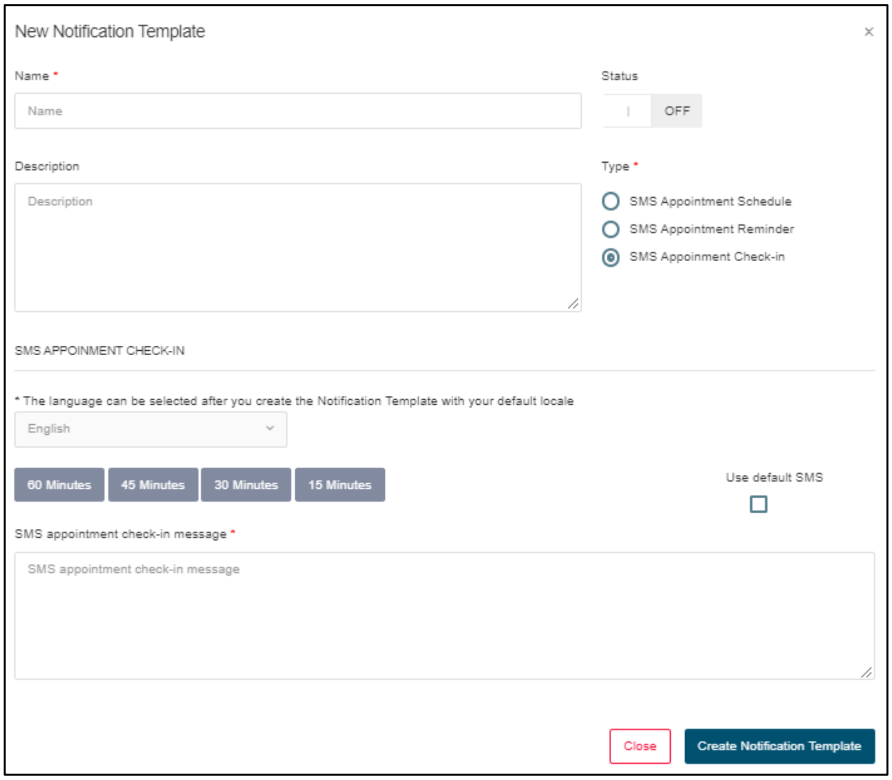
4. Type a **name** for the new template.
5. Change the **status** to "**On**".
6. Type a description of the notification.
7. Select "**SMS Appointment Schedule**".
8. Select "Use default SMS" to use the built-in SMS message for the patient.
9. If "Use default SMS" is not selected, type the SMS message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

SMS Appointment Reminder



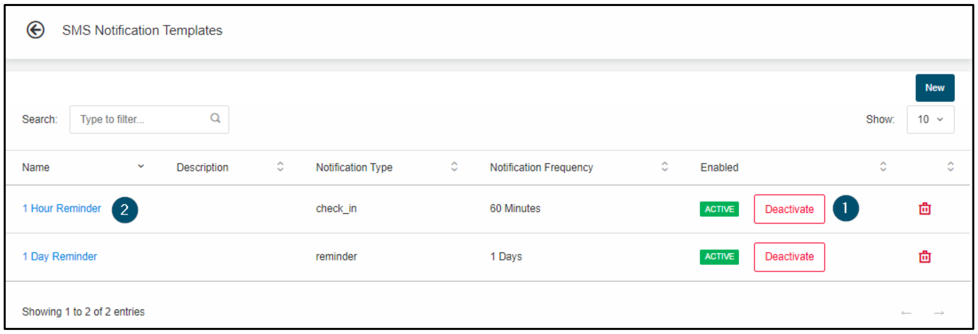
11. Type a **name** for the new template.
12. Change the **status** to "**On**".
13. Type a **description** of the notification.
14. Select "**SMS Appointment Reminder**".
15. Select **the length of time prior the appointment** when the message will be sent.
16. Select "**Use default SMS**" to use the 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

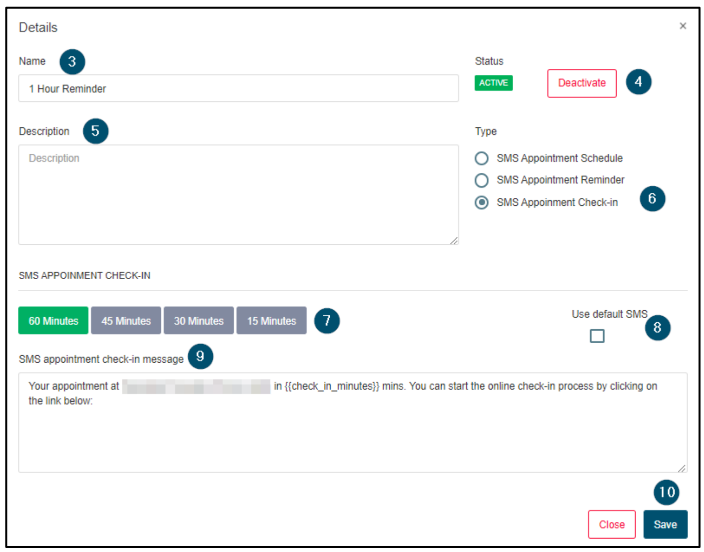


19. Type a **name** for the new template.
20. Change the **status** to “**On**”.
21. Type a **description** of the notification.
22. Select “**SMS Appointment Check-In**”.
23. Select **the length of time prior the appointment** when the message will be sent.
24. Select “Use default SMS” to use the built-in 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



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.

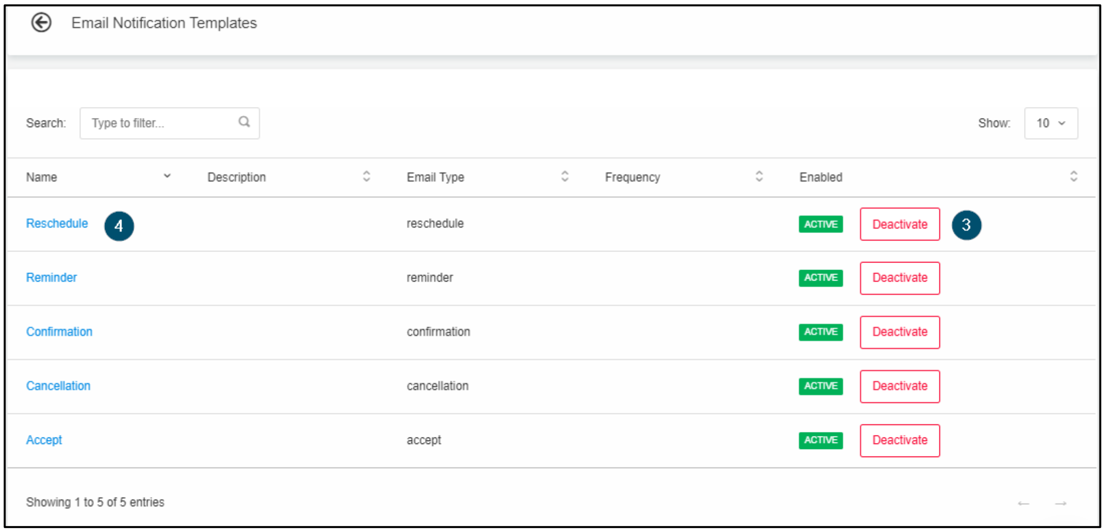
8.7.2 Email Notification

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

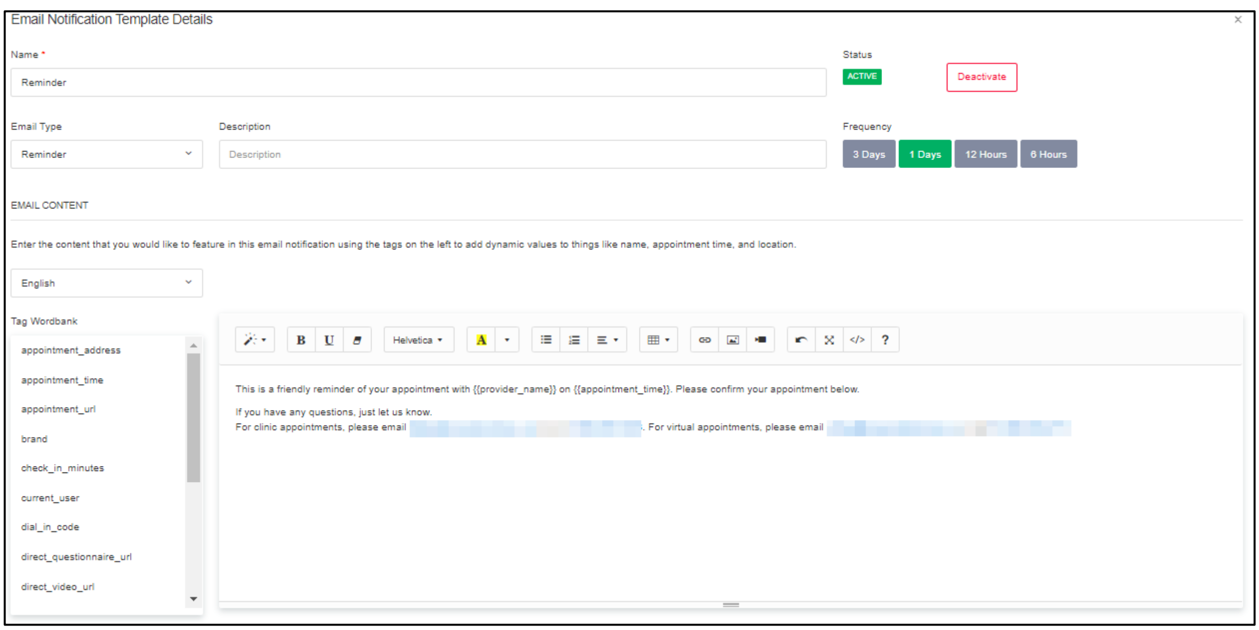
- Accept
- Cancellation
- Confirmation

- Check-In
- Reminder
- Reschedule

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



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

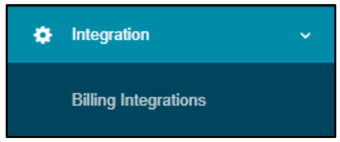


5. **Rename** the template.
6. **Activate or Deactivate** the Email Notification Template.
7. Select the **email type**.
8. Type in a **description**.
9. Select the **language** to which the template applies.
10. Type the **body** of the email template.
11. **Save** the changes and **close** out the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

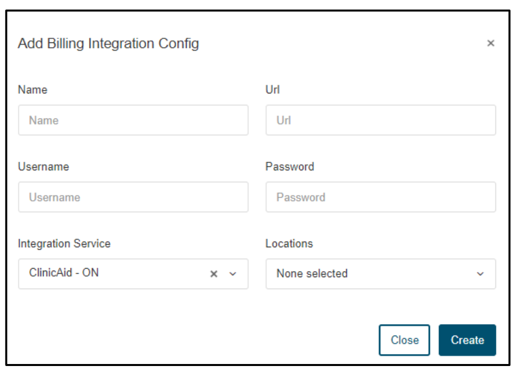
The platform can be integrated with third-party billing medical software.



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

8.8.1 ClinicAid

3. Click the **New** button.

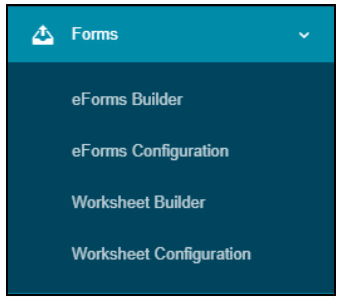


4. Input your ClinicAid information:
   - **Name**: The name this billing integration configuration
   - **URL**: The API url for the billing software to which you need to connect
   - **Username and Password**: the credentials to the billing platform
   - **Integration service**: select the billing 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.

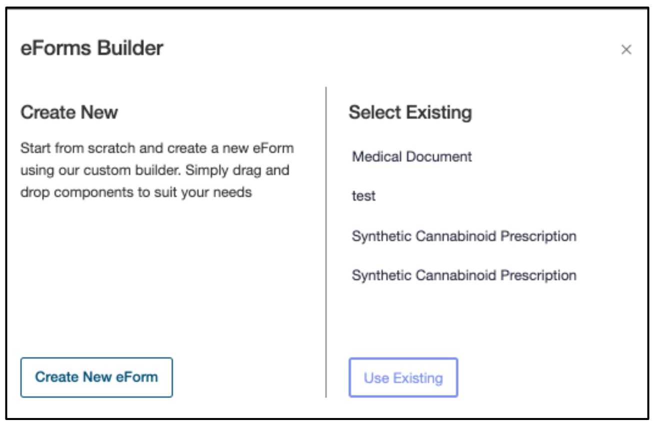
Note: Access ClinicAid directly from Ora by clicking **Billing> Clinic Aid Ontario**

8.9 eForms Builder

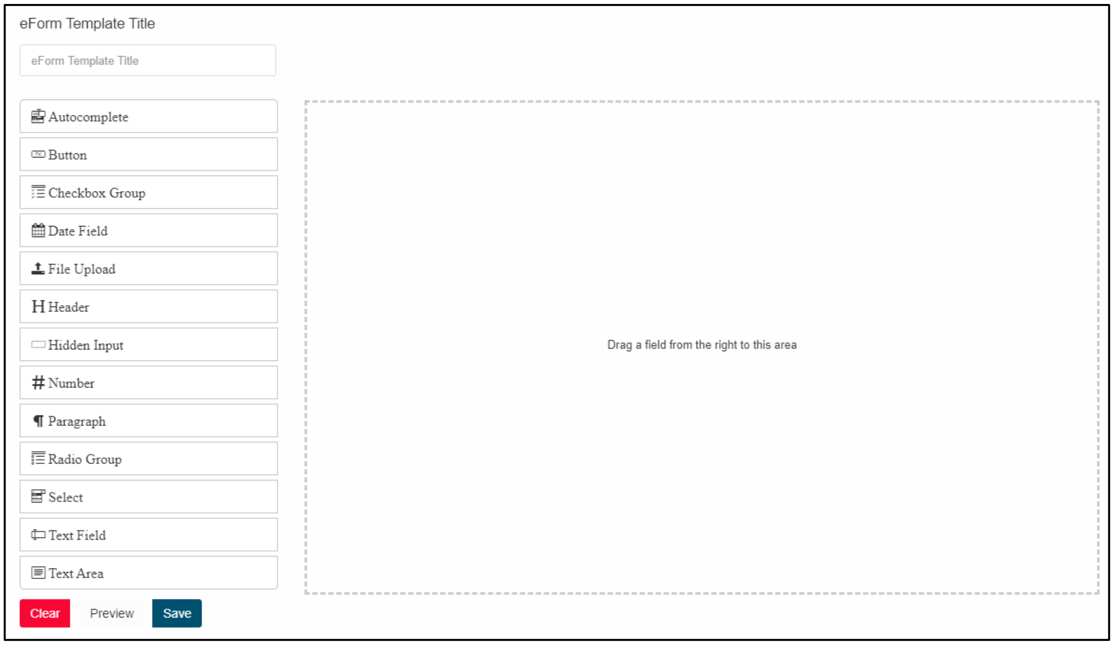
The eForms Builder lets you create forms to collect structured data entered in by the user.



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.