adracare

Official User Guide

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March 2021

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Revision History

Revision #	Revised By	Revision Date	Summary of Changes
1.0	Kristina Tan	March 6, 2020	Document Creation

2.2.3	Kristina Tan	April 24, 2020	Added: - Note to “Scheduling an Appointment and “Cancel an Appointment” - Support Staff creation - Updated: - Scheduling – Confirming an appointment - Appointment Details - Virtual Care with new screenshots for Provider, new

			loginless patient functionality, and screenshots for Patient - Schedule Templates - User Administration – Create a Patient, Claiming an Account
	Nahid Lalji, Kristina Tan, Thivaher Paramsothy	May 5 2020	Added: - Questionnaire Manager - Create Email and SMS notification templates Updated: - New Patient modal - New Provider modal - Availability
3.0	Cheryl Chan	June 5, 2020	Replaced: - Images of "New Appointment", "Appointment Details" and Video Session Buttons to reflect updated UI Added: -"Participants" card and "Manage Participants" functions -"Patient Details" card under appointment details page
3.1	Cheryl Chan	June 11, 2020	Added: -Organization Settings: "Organization Logos", "Interface", "Online Booking", "Appointments", "Documents", "Accounts"
5.2	Nilani Sritharan	September 3, 2020	Updated and Replaced Content and Images for Virtual Care – Video Session (p30 – 40, 42 - 57): - Join as a Provider - Join as a Patient
5.12	Nilani Sritharan	November 19, 2020	Added: - System Requirements (p7) to include updated browser for platform to run optimally Updated: - Encounter Notes to Session Notes (p26-29)

	Obianuju Ikejiani	December 7, 2020 March 10, 2021	Added: - Virtual Care Update Join as a Patient (login-less) & Images pg. 34 - Manage Subscriptions pg 106: Change Pricing Plan, Update Payment, & Cancel Subscription. - Patient Payment pg 107

1. System Requirements

Please reference the list below Adracare's supported devices, operating systems, and browsers.

Note: All devices must have a camera or microphone to use the program.

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

Note:
Safari IS NOT supported on Apple Macintosh computers.
Internet Explorer, Edge ARE NOT supported on Windows computers

Mobile Devices

Android devices (Android 8 – Android 10)

- Phones with Google Chrome or Mozilla Firefox
- Tablets with Google Chrome or Mozilla Firefox

Apple mobile devices (iOS 11+)

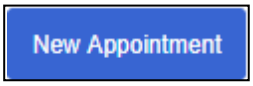
- iPhones with Safari
- iPads with Safari

Note:
The Adracare platform runs optimally when the latest version of a browser is used. Please ensure the browser required for your device is up to date.

2. Scheduling

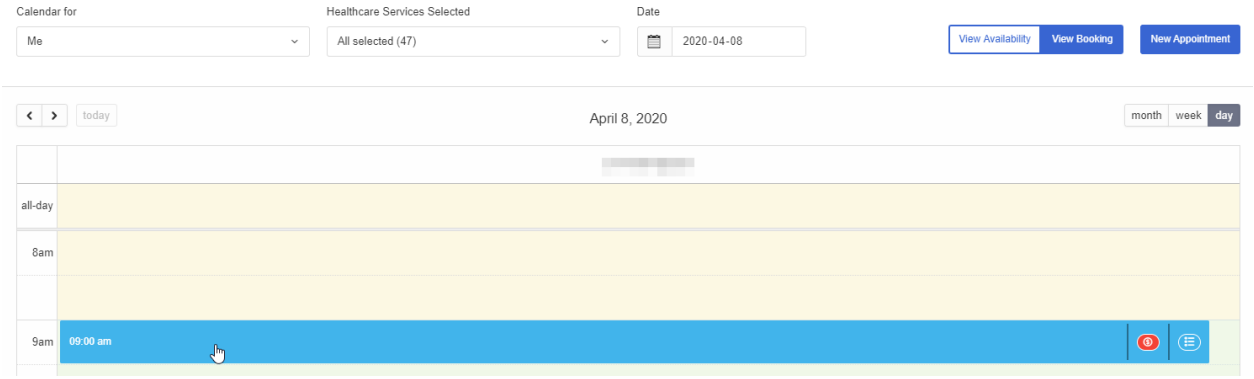
Scheduling an Appointment

Users can schedule an appointment using **Calendar** or **Appointments**.

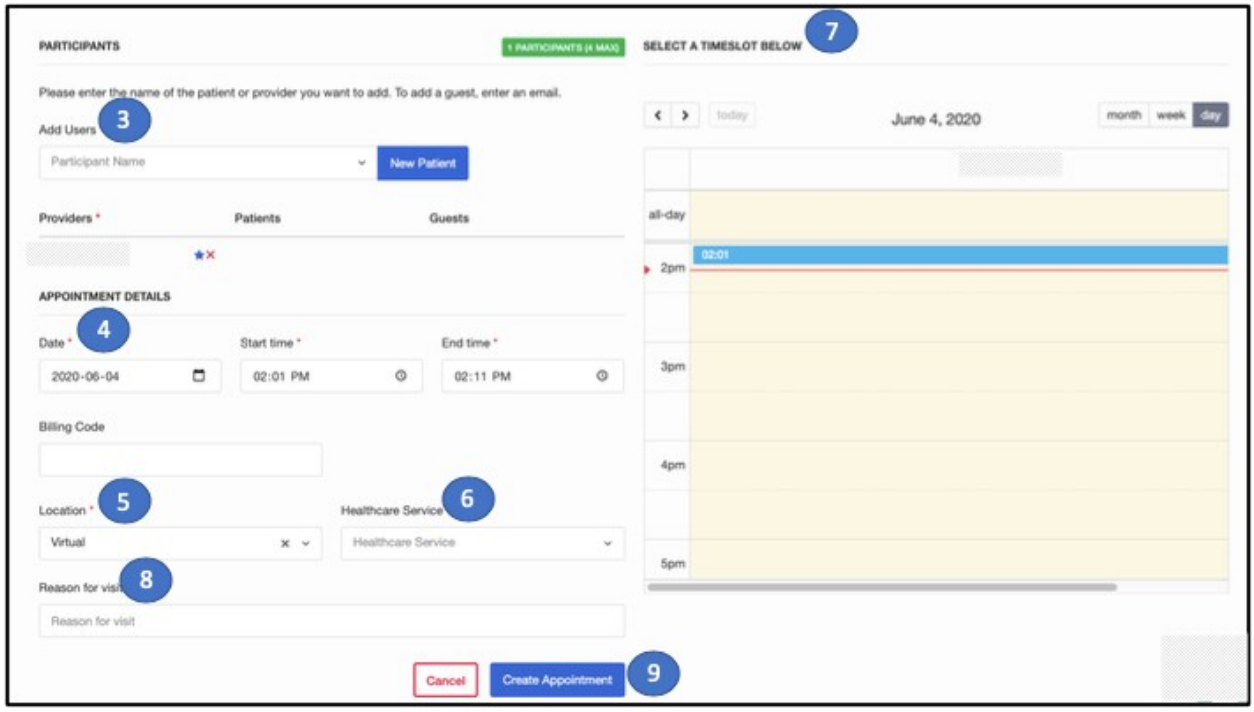


1. Click the "**New Appointment**" button on **Calendar** or **Appointments.**

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 and provider** who would like an appointment. If the patient does not exist, create a new patient. If applicable, choose a **secondary provider** who will need to attend the appointment. If applicable, enter the email of a **guest** you would like to invite to the appointment
4. Choose a **date and time** to start and end the appointment
5. Choose a **location**.

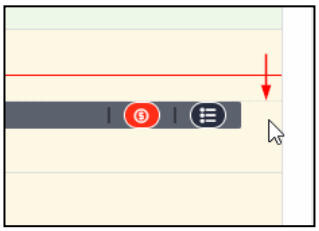
Note: To create a *video conferencing* session, select the "**Virtual**" location. See the Virtual Care section for more information on how to join a session.

6. If applicable, select the **Healthcare Service** related to 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.

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

Calendar Scheduling Tip: You can double-book or book on a cancelled appointment slot, by scrolling to the far right of the calendar and clicking the space the between the entry and the right-side of the calendar.



Rescheduling an Appointment

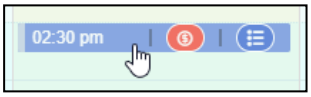
There are two ways to re-schedule an appointment:

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

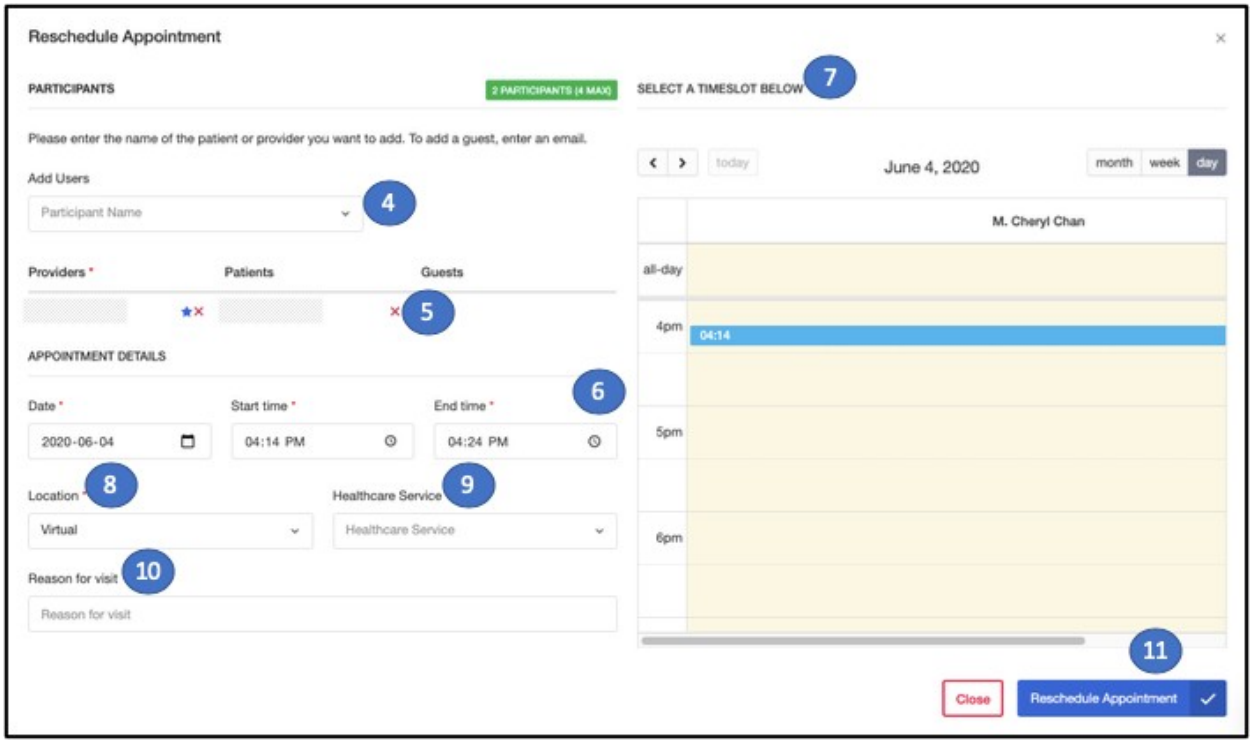
Rescheduling from the Calendar

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

Move an appointment

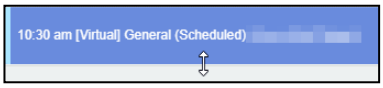


3. Left-click and drag-and-drop the appointment to another day and/or time.

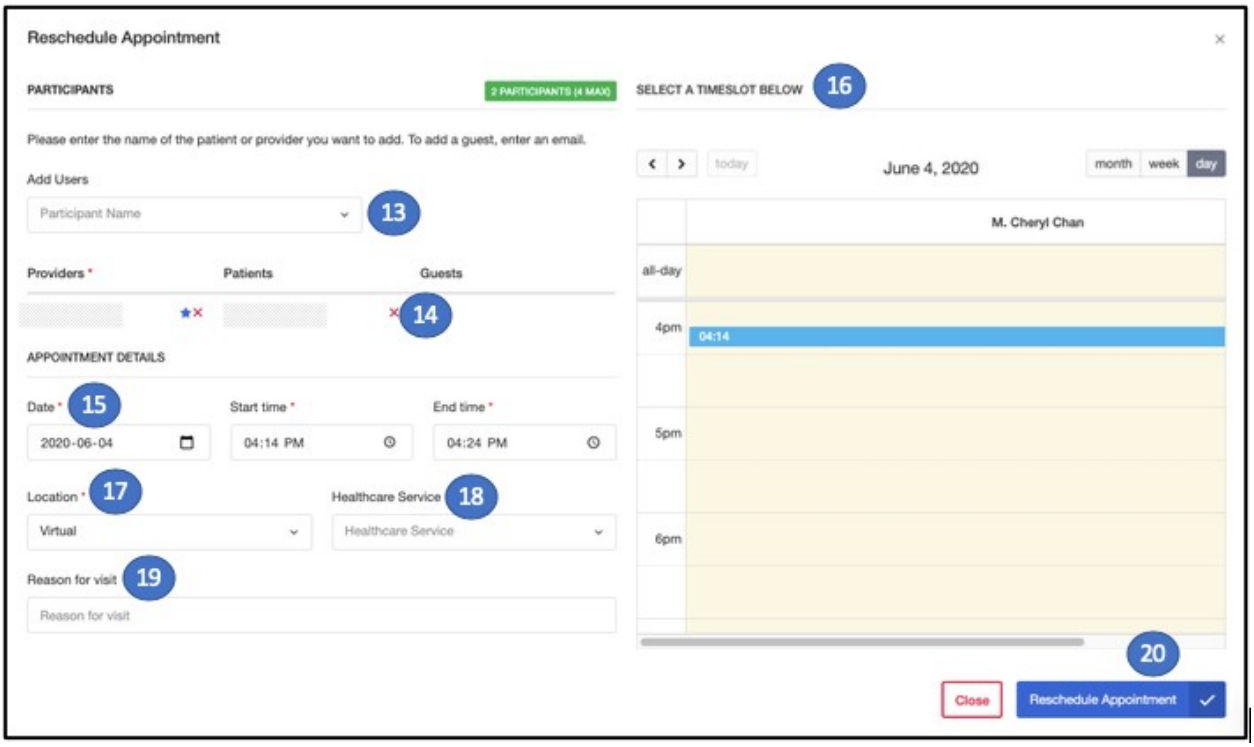


4. If applicable, change the **Participants** of the appointment.
5. If applicable, remove participants by selecting the red "x" next to the name
6. Confirm the **date and time** of the appointment.
7. **Time** can also be adjusted from the Calendar view on the right.
8. If applicable, change the **Location** of the appointment.
9. If applicable, change the **Healthcare Service** of the appointment.
10. If applicable, change the **Reason for visit** of the appointment.
11. Click "**Reschedule Appointment**" to save the changes.

Extend the appointment



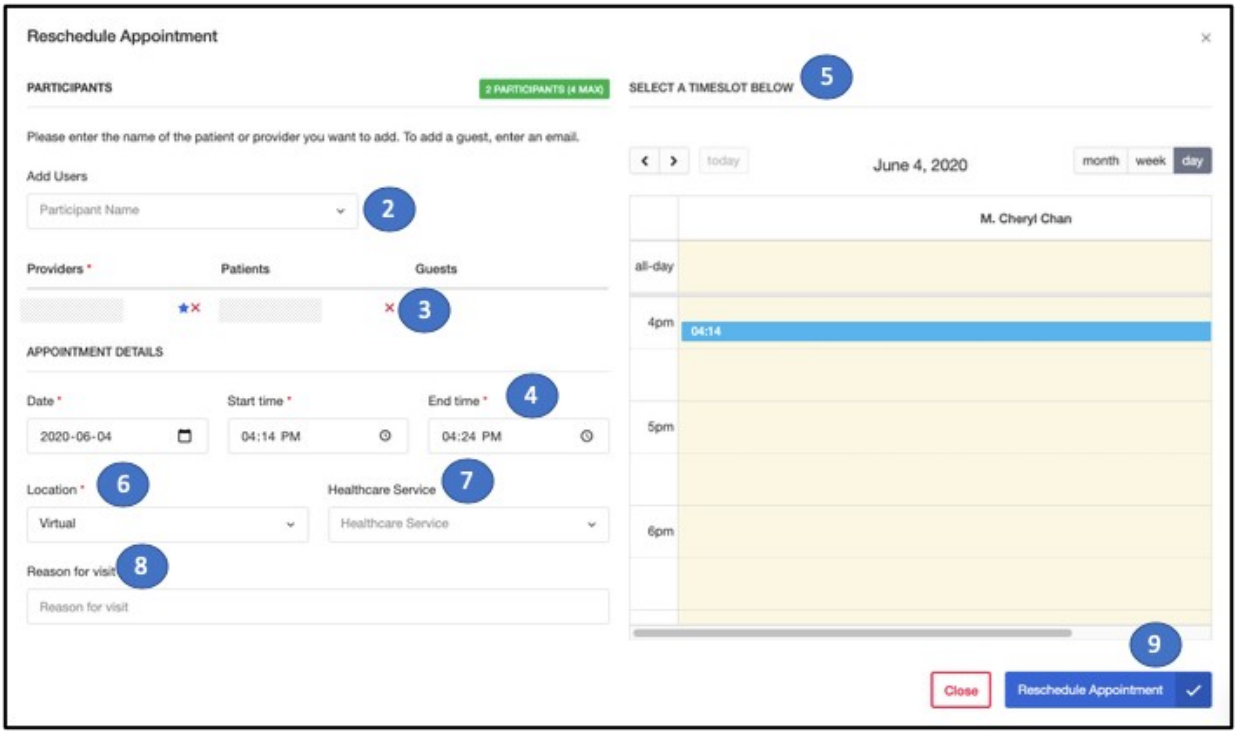
12. Hover over the bottom of the appointment and left click anddrag down to **extend the time**.



13. If applicable, change the **Participants** of the appointment.
14. If applicable, remove participants by selecting the red "x" next to the name
15. Confirm the **date and time** of the appointment.
16. **Time** can also be adjusted from the Calendar view on the right.
17. If applicable, change the **Location** of the appointment.
18. If applicable, change the **Healthcare Service** of the appointment.
19. If applicable, change the **Reason for visit** of the appointment.
20. Click "**Reschedule Appointment**" to save the changes.

Rescheduling from Appointment Details

1. Click the "**Reschedule**" button on the top-left side of the Appointment Details page.



2. If applicable, change the **Participants** of the appointment.
3. If applicable, remove participants by selecting the red "x" next to the name
4. Confirm the **date and time** of the appointment.
5. **Time** can also be adjusted from the Calendar view on the right.
6. If applicable, change the **Location** of the appointment.
7. If applicable, change the **Healthcare Service** of the appointment.
8. If applicable, change the **Reason for visit** of the appointment.
9. Click "**Reschedule Appointment**" to save the changes.

Edit an Appointment

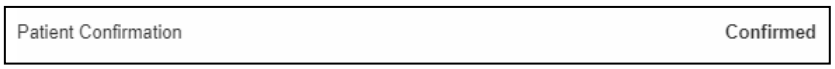
1. Click the "**Edit**" button in the top-left side of the Details page.

10. If applicable, change the **Primary Provider** of the appointment.
11. If applicable, change the **Healthcare Service** of the appointment.
12. Click "**Edit Appointment**" to save the changes.

Confirming and Unconfirming an Appointment

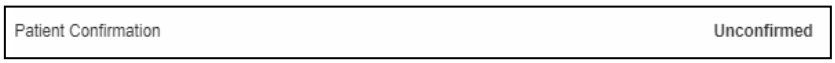
A user can confirm that a patient will be coming in for an appointment.

1. Click the "**Confirm**" button in the top-left side of the Appointment Details page.



2. The Patient Confirmation field will be updated to "**Confirmed**".

3. If the patient can no longer attend the appointment, click the "**Unconfirm**" button in the top-left side of the Details page.



4. The Patient Confirmation field will be updated to "**Unconfirmed**".

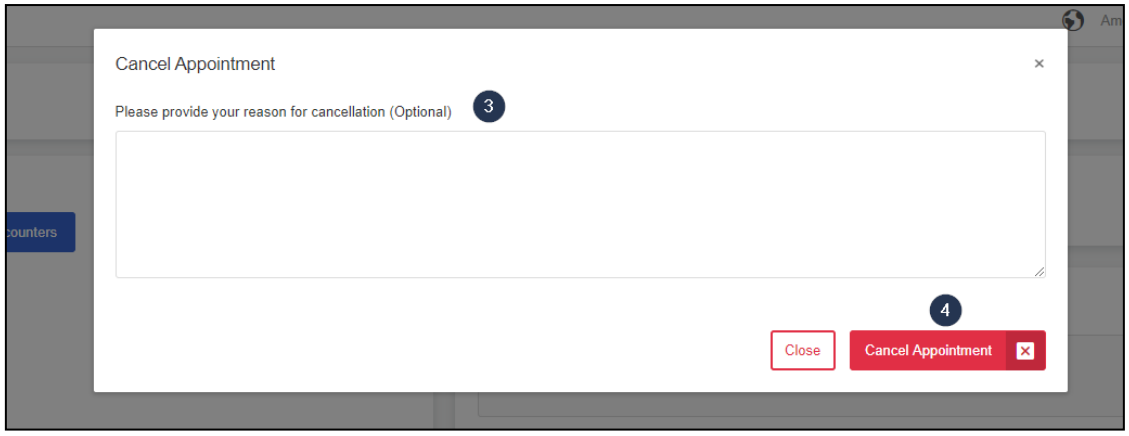
Patient Confirmation	Confirmed

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.



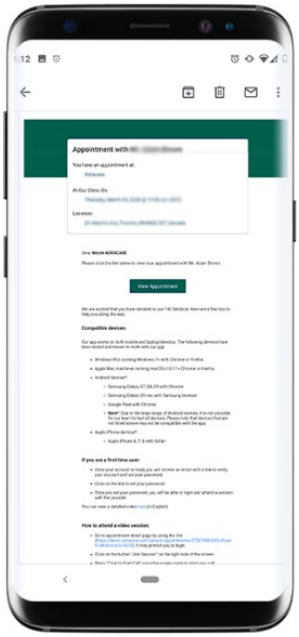
3. Type a "**Reason for Cancellation**"as applicable.
4. Click "**Cancel Appointment**" to cancel the appointment.

Note: Cancelled appointments cannot be deleted from the calendar for auditing purposes.

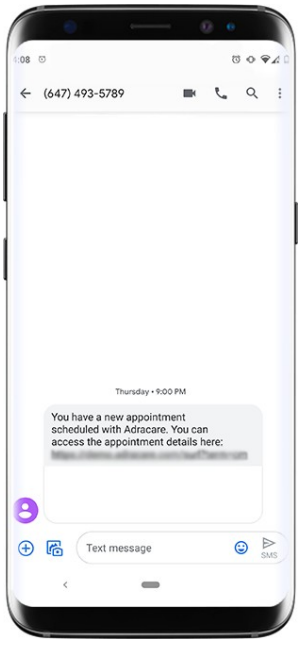
Appointment Notifications

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

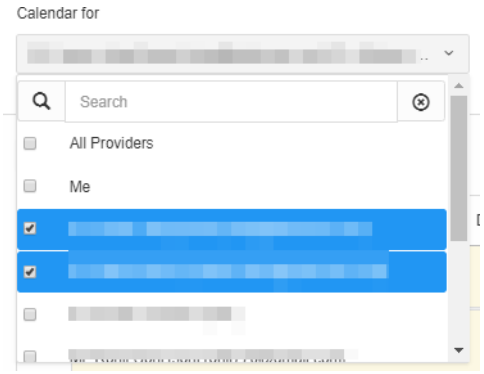


Viewing other providers appointments

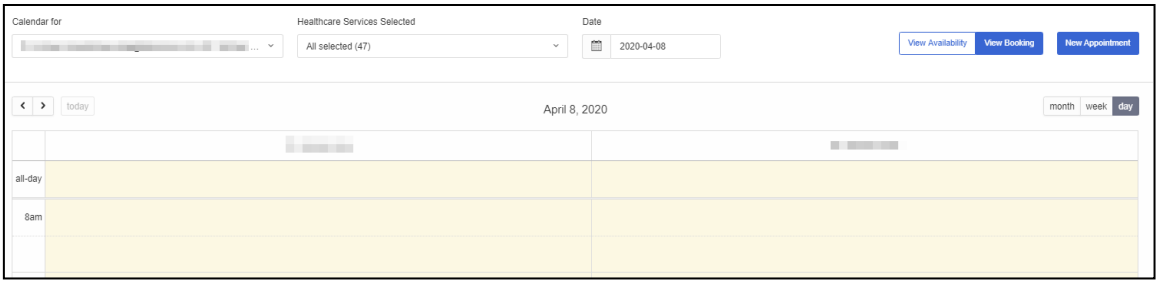
As an administrator, you can view other provider appointments from within "**Calendar**" and "**Appointments**".

Calendar

1. Click "**Calendar"**.



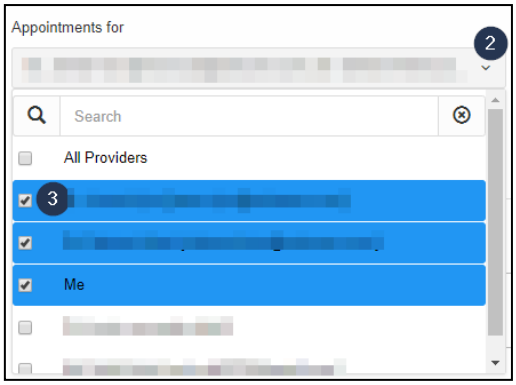
2. Click the "**Calendar for"** field.
3. Select one or multiple **provider name(s).**



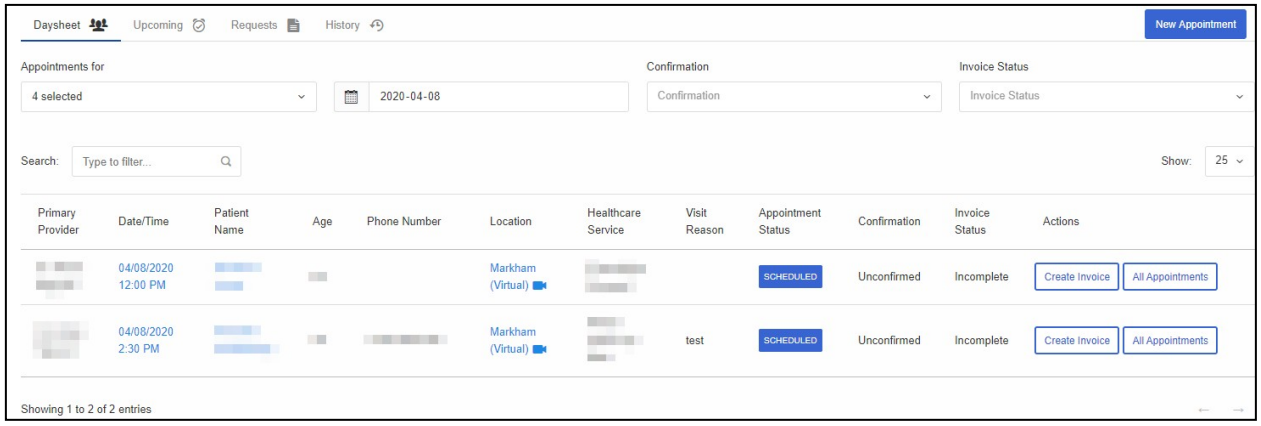
4. The schedule(s) will load in the calendar.

Appointments

1. Click the "**Appointments**" module to open the **Appointments List**.



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

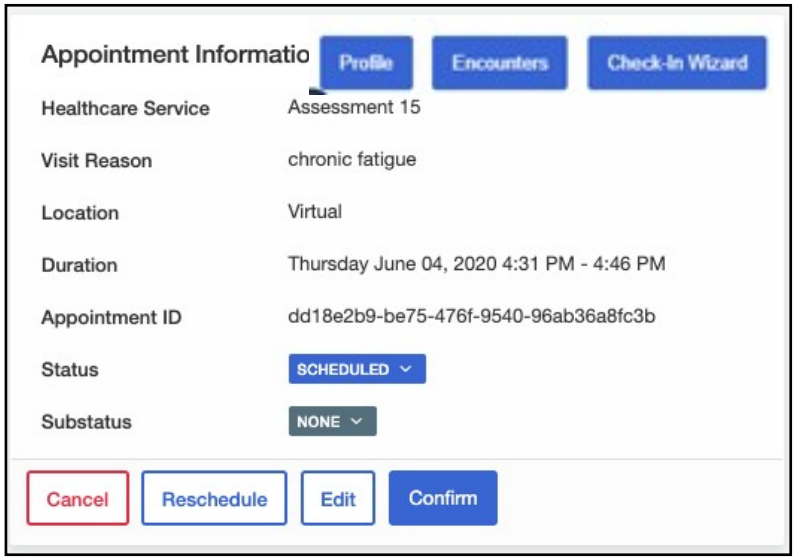


4. The appointment(s) will load in the list.

3. Appointments

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. The **Appointment Information** panel displays:

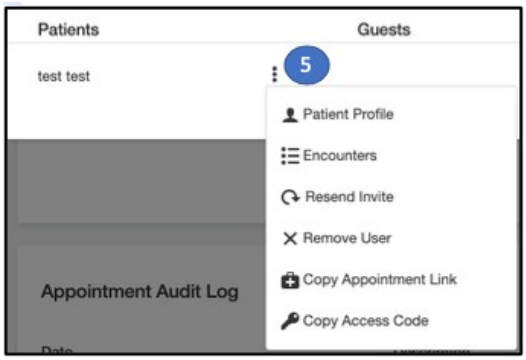
    - **Healthcare Service** (e.g., First Assessment, Follow up)
    - **Visit Reason**
    - **Location** of appointment
    - **Date** of Appointment and its **start and end time**
    - Appointment **Referral status** (if appointment is associated to a referral)
    - Appointment **status**
    - Appointment **substatus**
    - Patient **Confirmation**

Note:
The **Patient's Profile**, **Sessions**, and the **Check-In Wizard** (Registration Module) pages are easily assessible using the links above the summary panel.

2. The video session can also be joined from the "**Appointments Details"** page by clicking "**Join Video Session**" in the top right corner

3. Select **Manage Participants** to add or delete participants

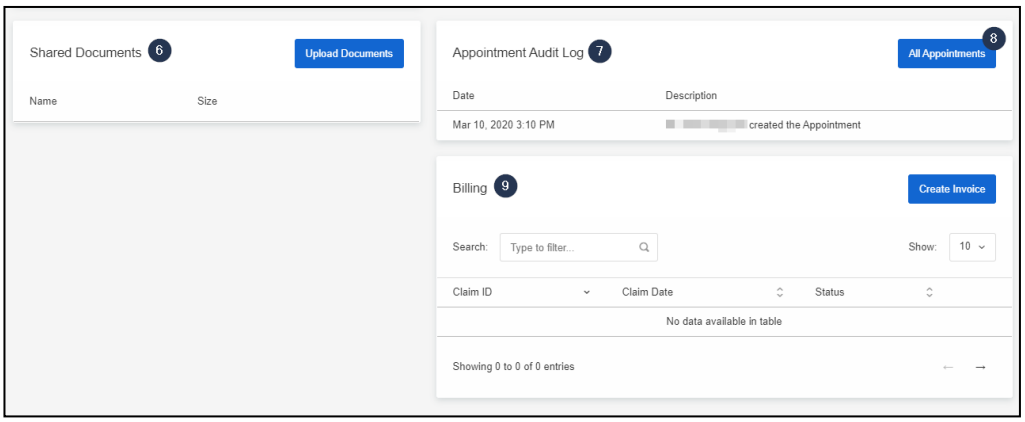
4. Type in the name or email of the participant you would like to add and click "**Invite"**



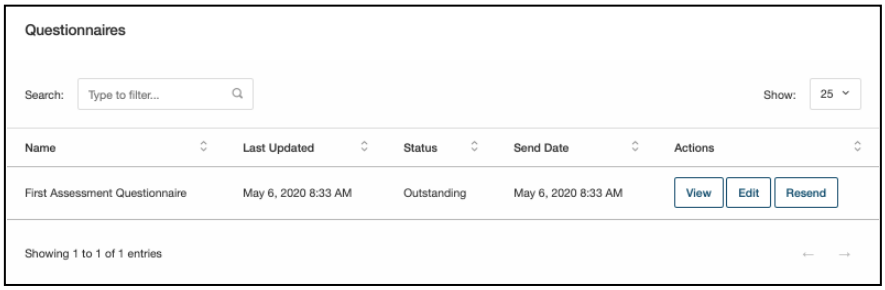
5. Clicking the 3 vertical dots on the right of the participants name allows for more functions:

   - Access **Patient Profile**
   - Access **Sessions**
   - Resent Invite (Email and/or SMS)
   - Remove User from appointment
   - Copy Appointment Link
   - Copy Access Code

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



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. 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 **Sessions** section to learn how to import a completed Questionnaire.

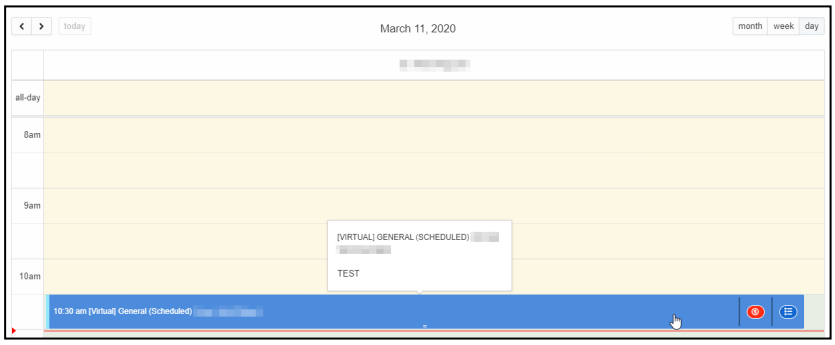
11. The **Patient Details** panel displays:

- Any patient alerts in the "**Alerts**" section and a button to "**Edit Alert"**
- **Phone number** of the patient
- If applicable, the **Referring Provider**
- If applicable, the **Referring Status**
- **Patient Notes** are created by users for the selected appointment.

Accessing Appointment Details

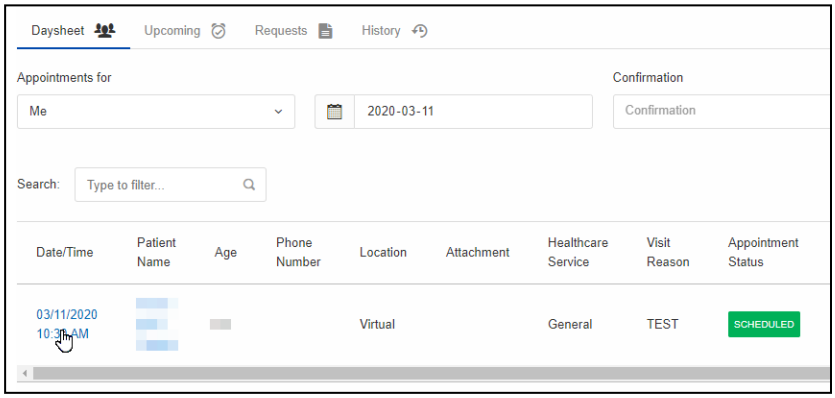
There are three ways to access a scheduled appointment's details:

Calendar



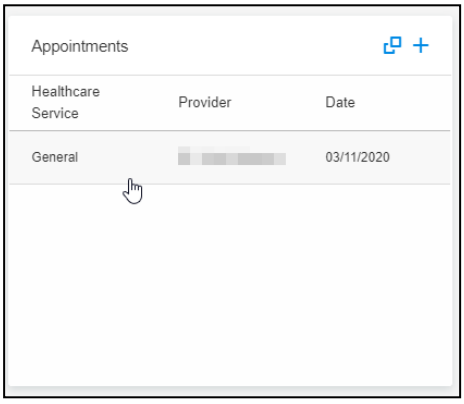
1. Click on **Calendar**
2. Click on the appointment

Appointments



1. Click on **Appointments**
2. Click on the appointment's **Date/Time**

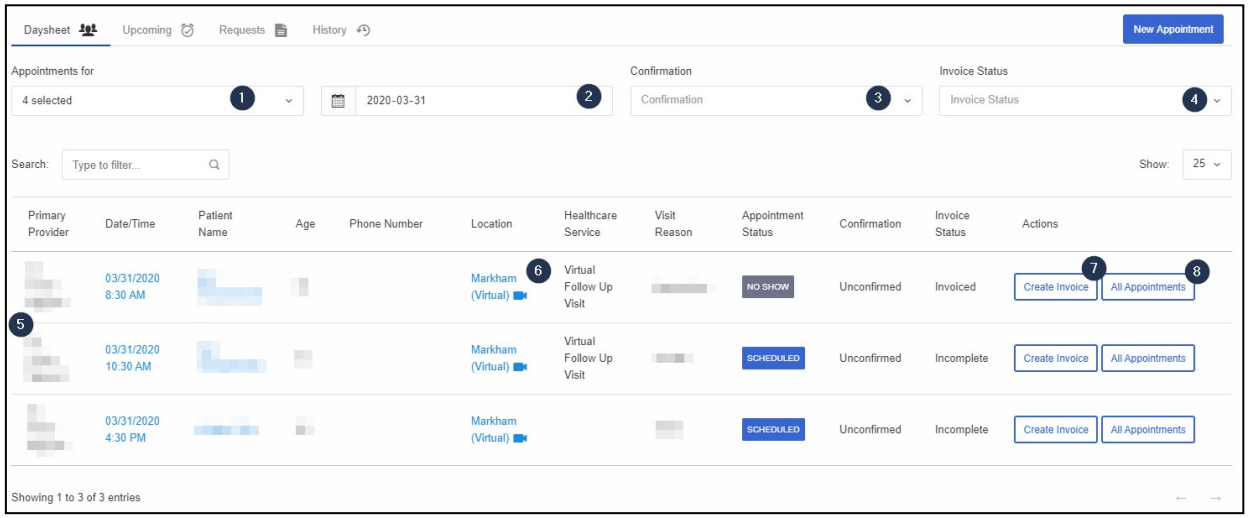
Patient Profile (CPP)



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

Daysheet

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



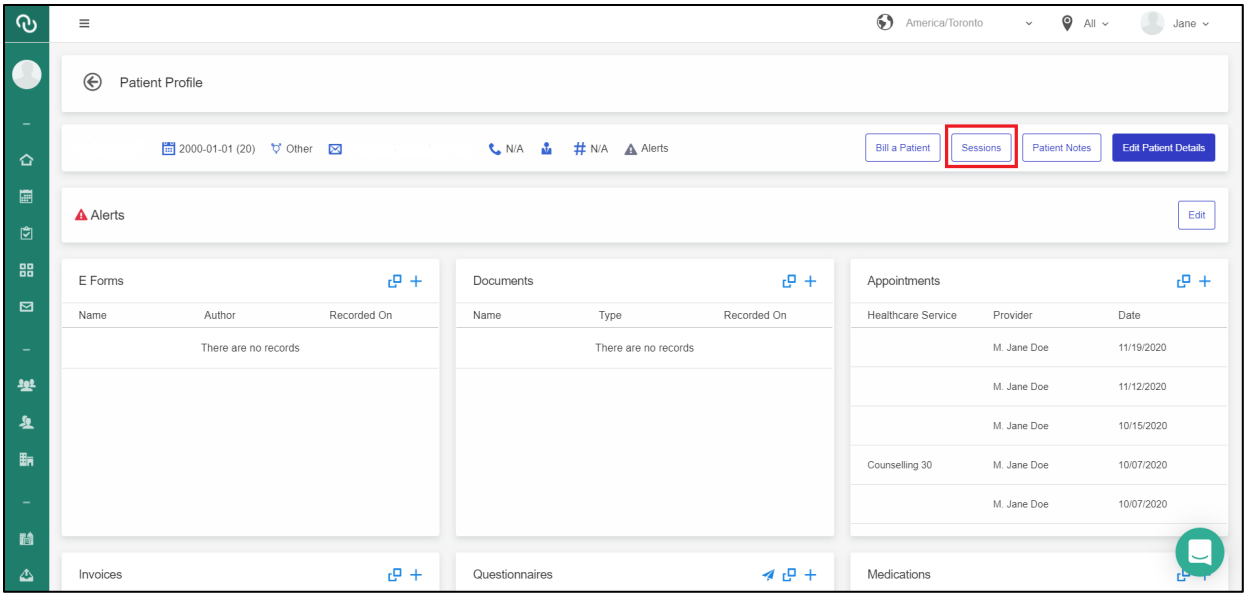
1. If applicable, select one or multiple **providers** to view their schedules.
2. Select a **day** to see the schedule for it.
3. Select an **appointment confirmation** status to filter the appointments.
4. Select an **Invoice Status** to filter the appointments.
5. Review the overview of **patient's appointment information**.
6. See where the appointment will be taking place.

Note: If your appointment is virtual, click the Location to be taken to the Virtual Care waiting room when the appointment is about to start.

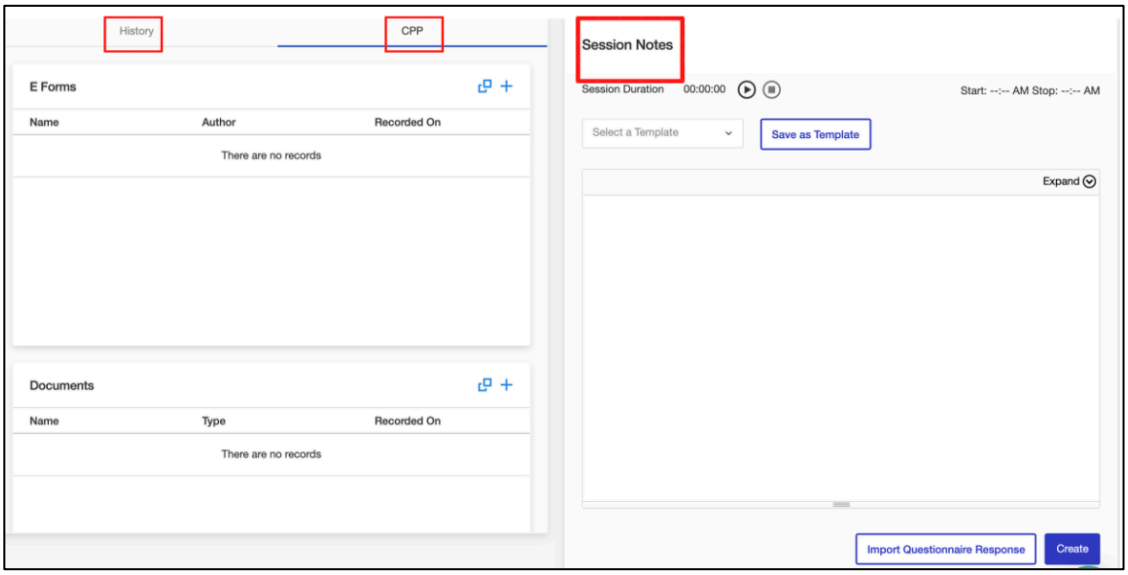
7. Create an invoice (only applicable with **Billing Integration** Module).
8. See the patient's **appointment history**.

Session Notes

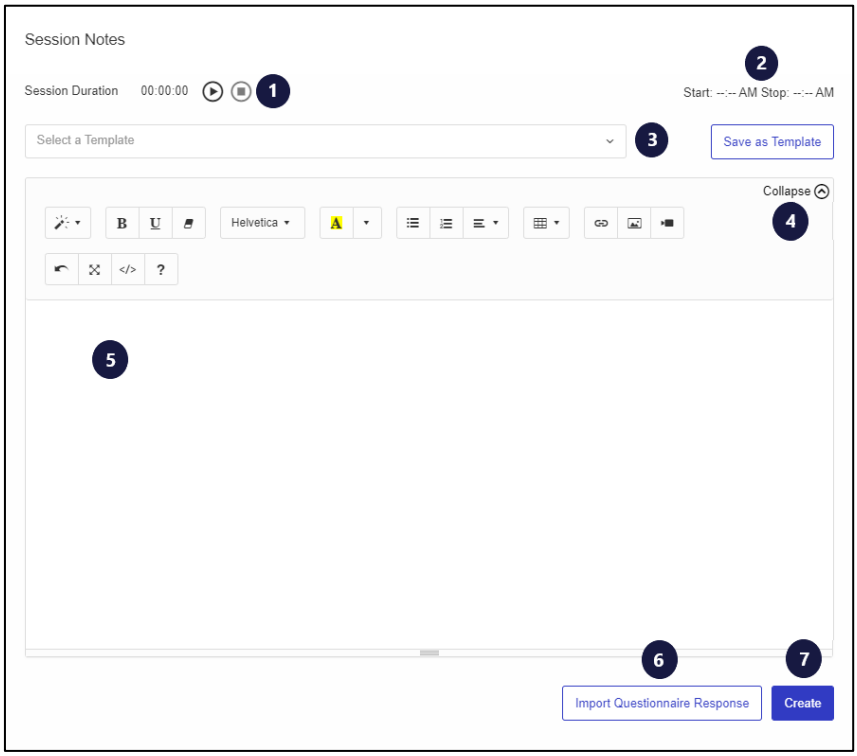
Users can document patient appointments by creating session notes (previously known as Encounter Notes). It can be accessed by going to the Patient Profile and clicking the **Sessions** button at the top.



On the **Sessions** page of an appointment, **CPP** cards and **History** of session of history notes are displayed on the left and the section to enter **Session Notes** is on the right.

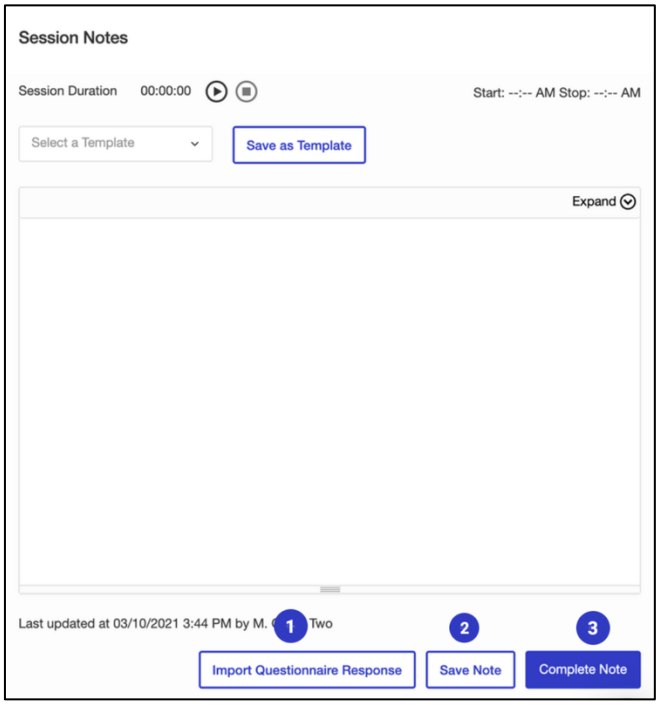


Creating Session Notes



1. **Session Duration** displays the running time it takes for your documentation during an appointment if your organization requires this information for billing purposes. Start the timer by clicking the **Play** button, pause the time with the **Pause** button and stop the timer with the **Stop** button .
2. The **Start Time** and **Stop Time** timestamps for the session note are displayed here.
3. Select a **Session Template**, if applicable. Alternatively, you can create a Session Template after completing an outline for your note and then clicking the **Save as Template** button.
4. **Expand or collapse** the Session Notes toolbar to allow for more space on the screen.
5. Type any **notes** or **complete the session template** in this section.
6. Click the **Import Questionnaire Response** button if you want to import questionnaire responses to the Session Note.
7. Click the **Create** button to save the session note so that it can be edited at a later time.

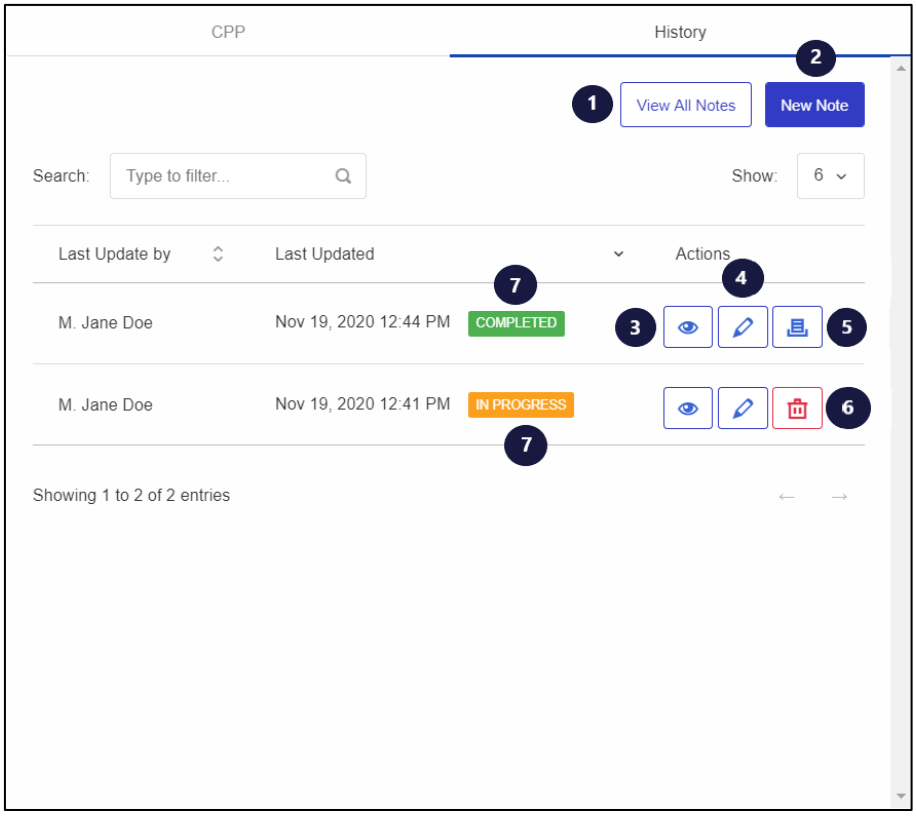
Once the session note is created the following buttons will appear at the bottom of the Session Note panel.



1. Again, you have the opportunity to **Import Questionnaire Responses** to the Session Note.
2. If any changes have been made to the note since it has been created, click **Save Note** to save the changes.
3. Click **Complete Note** once the session note is finalized.

View, Edit, Delete and Fax Session Notes

Session notes can be viewed, edited, deleted and faxed to other providers.



1. Click **View All Notes** to see all the session notes created for the patient consecutively, in chronological order on one document.
2. To create a new session note, click **New Note**.
3. **View** the session note on a document page.
4. **Edit** the session note by clicking this button.
5. **Fax** the session note to another provider.

Note: This button will only appear once the session note has been marked as complete by clicking the **Mark as Complete** button as mentioned previously.

6. Delete the session note permanently from the patient's record.
7. Statuses of the session note.
   In Progress: If the session note has been created, edited and saved only.
   Completed: If the session note has been marked as complete.

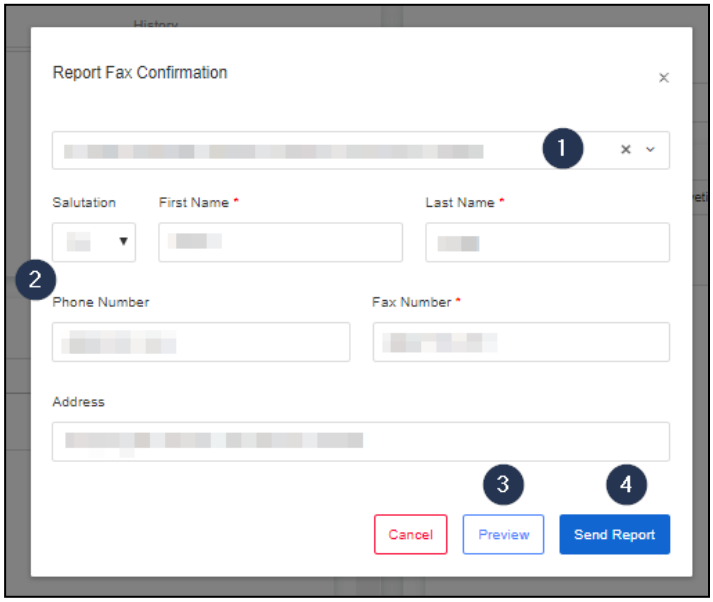
Importing a Completed Questionnaire

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

1. In the **Sessions** 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 session notes.

Generating Reports and Sending to Providers

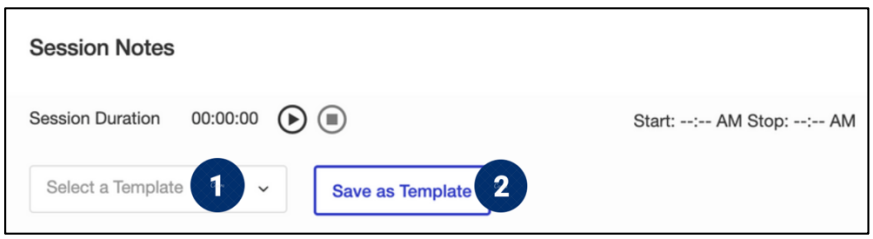
Before sending the report to a provider, confirm their information using the **Report Fax Confirmation** modal.



1. **Select** a new provider (if applicable).
2. **Verify/Edit** provider's details.
3. A preview of the report can be viewed by clicking "**Preview**".
4. 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.

Creating a Session Note Template

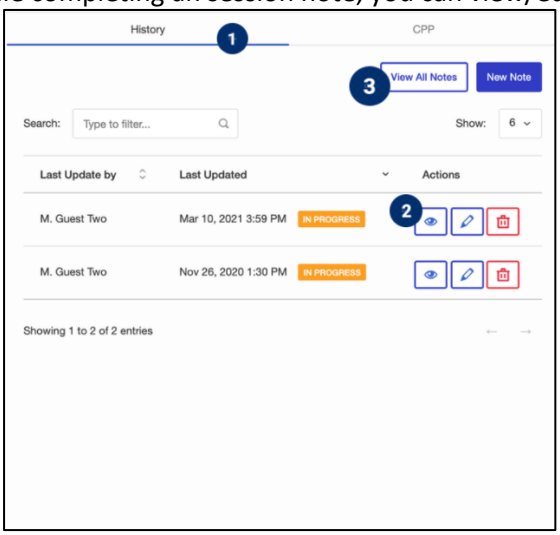


1. Create the template in the text editor.
2. Click “**Save as Template**” to save the template for future use.

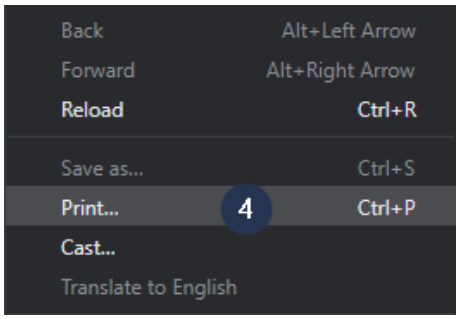
3. Enter a name for the template.
4. Click “**Save**” to save the template for future use.

View Session Notes History

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



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



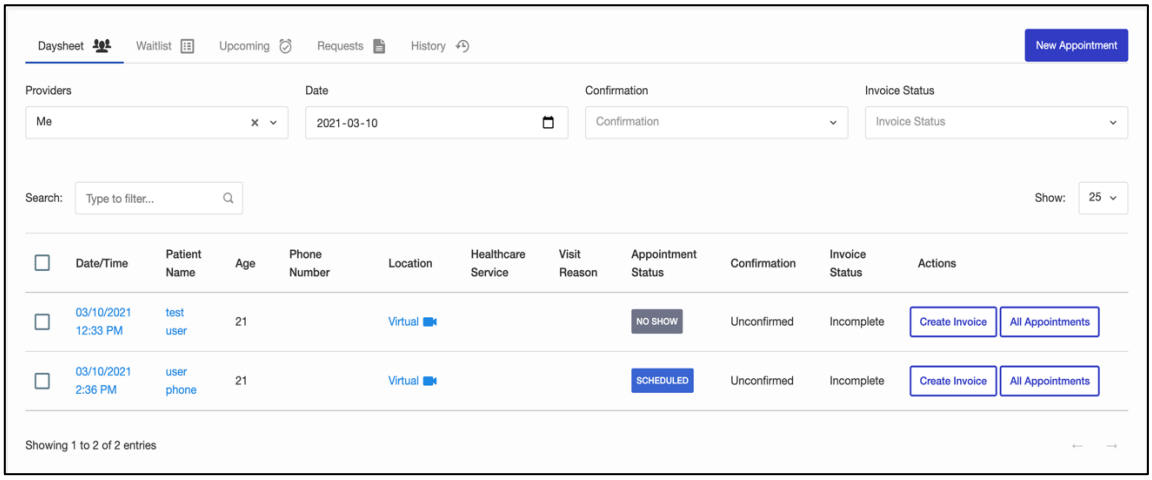
4. To print a session note within the “**View All**” pop-up, right-click within the note and select “**Print**”.

4. Virtual Care

Video Session

Join as a Provider

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

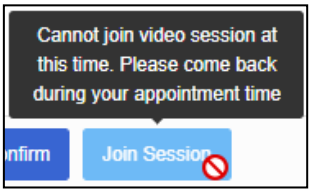


1. After logging into your account, go to **Appointments** and go to the "**Daysheet**" tab.
2. Click the Date/Time of the upcoming appointment.

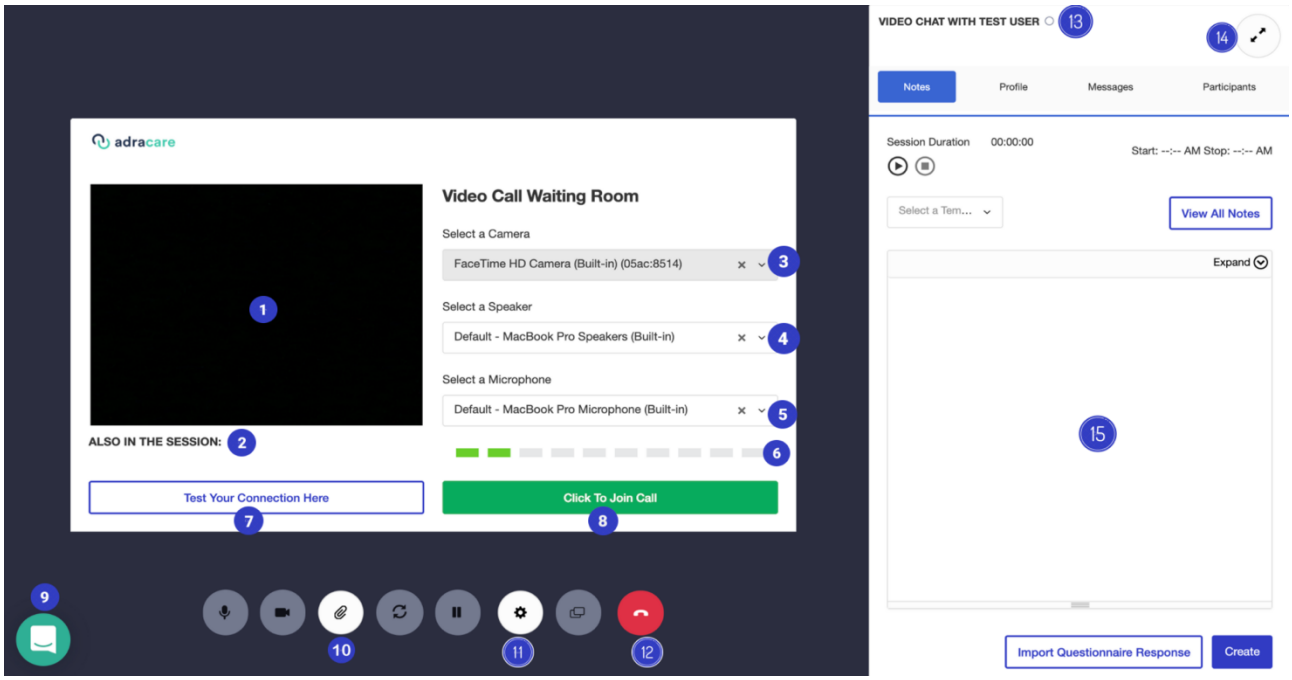
3. Click the "**Join Session**" button to be directed to the **Video Call Waiting Room**.

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.

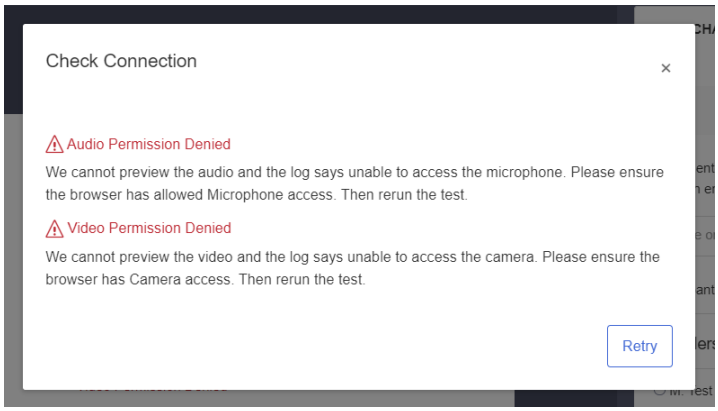


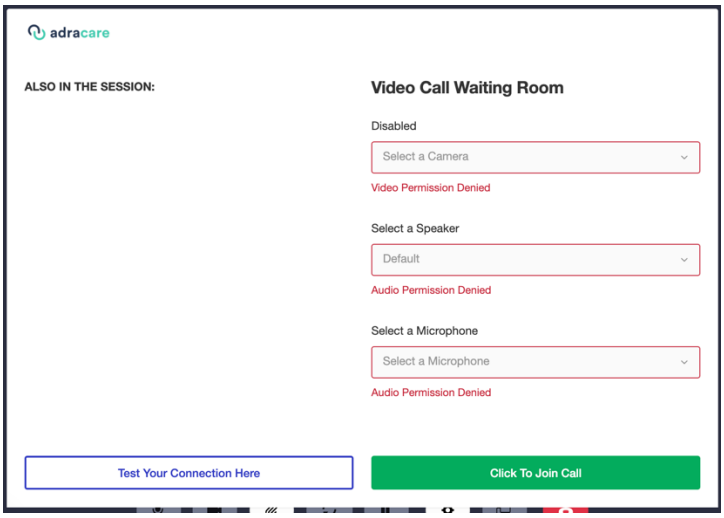
After clicking the **Join Session** button, the user will be directed to the **Video Call Waiting Room** screen.



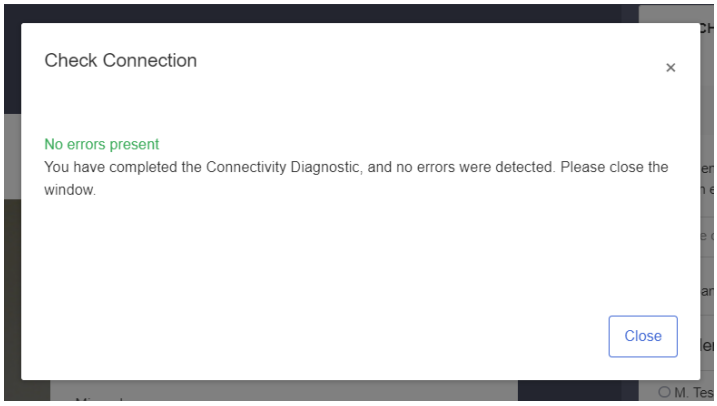
1. User can see a camera preview of themselves.
2. User can see who has joined the call (NOTE: Anyone who is only in the Video Call Waiting Room will not appear, this lists the participants who have already pressed the **Click to Join Call** button)
3. Switch various cameras if there is more than one on or connected to the device the user is using.
4. Switch various speakers when using the Chrome browser. On other browsers, speaker will be set to the default
5. Switch various microphones if there is more than one on or connected to the device the user is using.
6. User can determine if their microphone is working. If the bars are sequentially lighting up in a green colour when they are speaking, or any other sound is being produced this means the microphone is functional and the permissions have been allowed. If there are only grey bars this indicates the microphone is not functional and the permissions may not have been allowed/blocked.
7. User can check if audio and video permissions have been allowed. If permissions have been denied the following screen will appear:

Note: The user can run the same check prior to an appointment. For more information, go to page 59 of this user guide.





If permissions have been allowed the following screen will appear:



8. Join the session to interact with other participants by clicking this button.

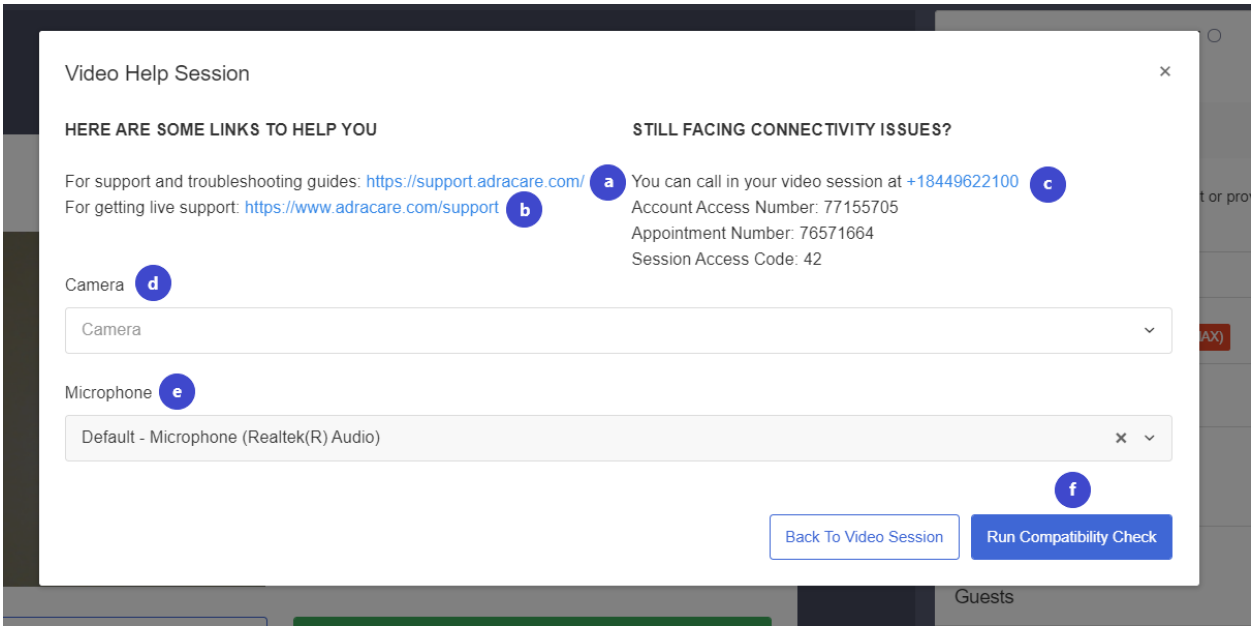
Note: To use video conferencing, allow or enable the use of the Camera and Microphone on the respective browser.

9. Interact with the Adracare Support Team's online live chat agents if technical support is required.

10. Open the **Shared Documents** window.

A. Press the **Select Files** button to select a file to upload from your computer.
B. Click the **Upload** button to send it to the other participants in the session. The recipient will be able to download the file during the session by clicking the paper clip button on their session interface.
C. Press **Cancel** to close the window to return to the session.

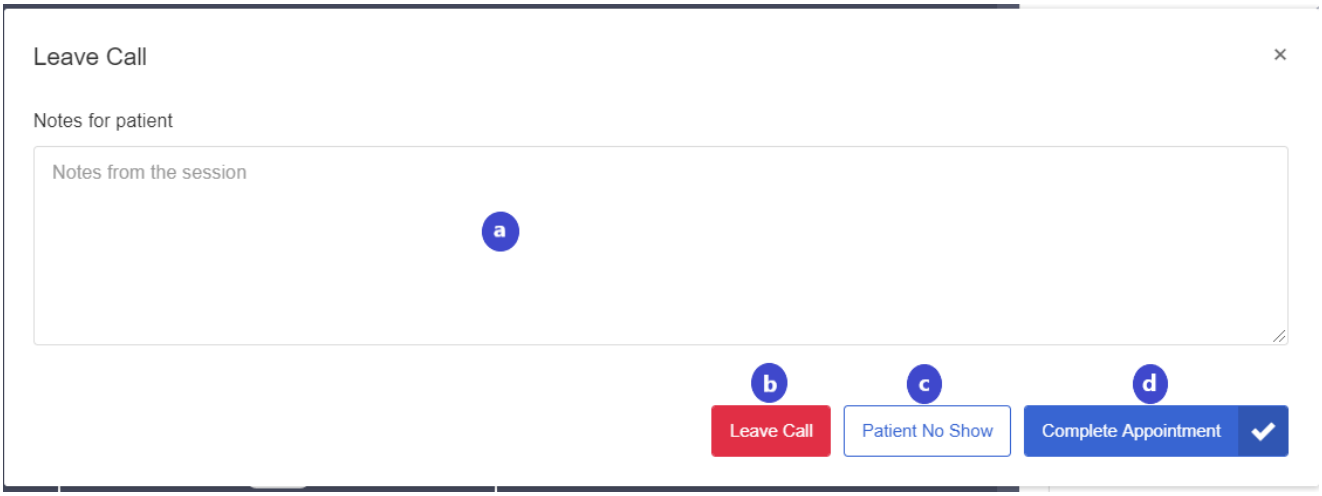
11. Use the support button to access:



a. Link to for the Adracare knowledge base

b. Link for contact information for the Adracare Support Team
c. Dial-In option information for the session
d. Switch to various cameras if the device has more than one
e. Switch to various microphones if the device has more than one
f. To complete a compatibility check for audio and video

12. Leave the call. This will prompt you to the following screen:



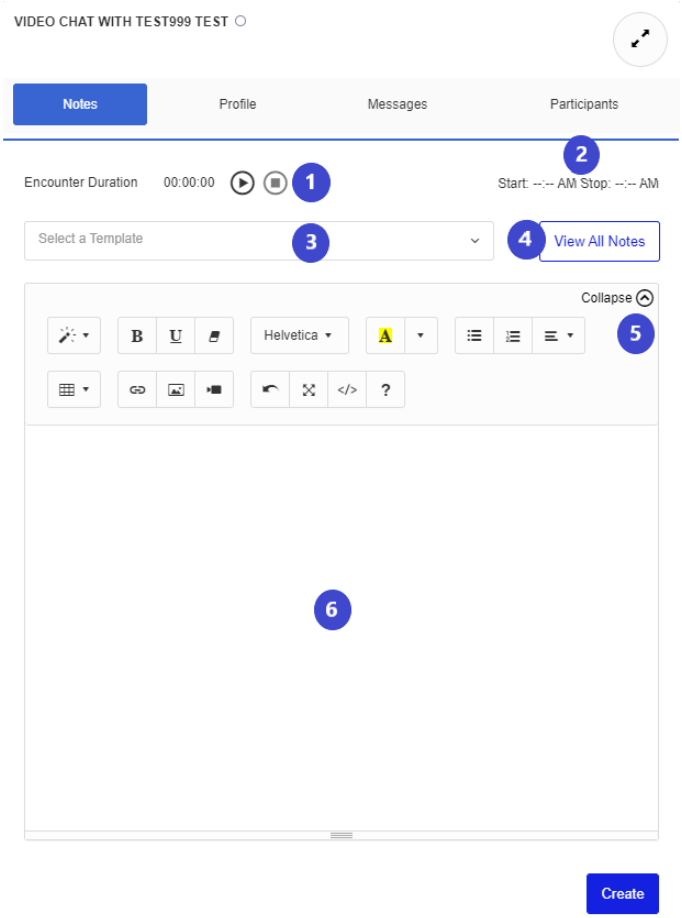
a. Write notes regarding the session in this field.
b. **Leave Call –** this action allows the user to leave the call, but does not mark the appointment as completed. This allows the user and other participants to re-join the session if needed.
c. **Patient No Show -** if the patient does not show up for the appointment
d. **Complete Appointment** – marks the appointment as completed and leave the call. The user and participants of the session will no longer be able to join the session.

13. User will know when the patient joins a session as the circle will turn green once the patient presses the **Click to Join Call** button.
14. Toggle to full screen mode. The messages and participants tabs will be collapsed to expand the video feed to the full length of the window.
15. Send and receive messages from the patient. Also, a log is available here to indicate when a user has removed or added audio or video as well as when they have entered of left the session.

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

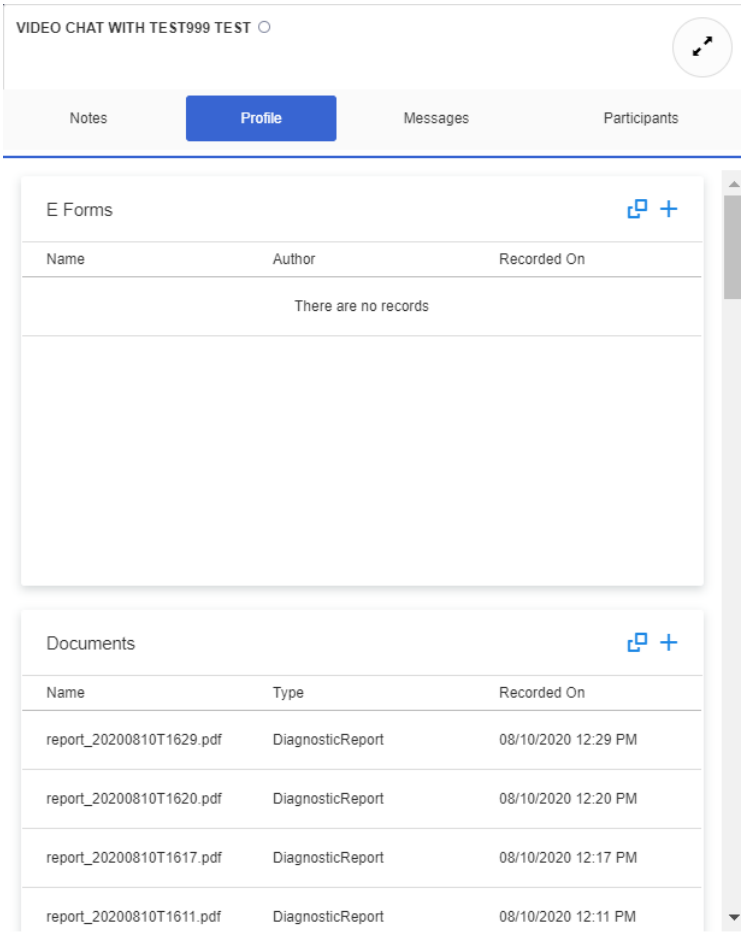
The following tabs are found in the right-hand side panel of the Video Call Waiting Room screen applies to providers with the *Premium* plan only.

Notes



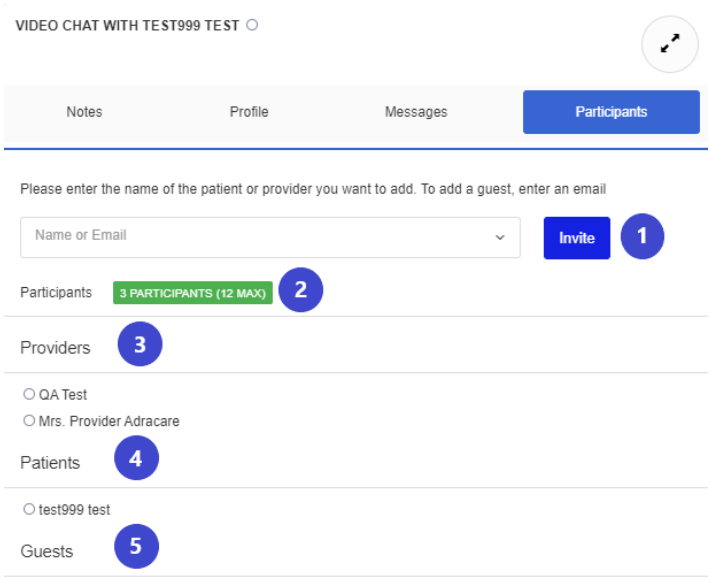
1. Start and stop the timer to keep track of the session if required for auditing or billing purposes.
2. Start and end times are displayed.
3. Choose a pre-made template to write session notes.
4. View previous notes created for this patient.
5. Collapse or expand the formatting toolbar as needed.
6. Write session notes and click the **Create** button to publish the session notes in the patient's cumulative patient profile.

Profile



Access the patient's cumulative patient profile during a video session with the patient. The user can view any eforms, documents, medications, allergies and much more found within in the patient's profile.

Participants



1. Invite other providers, patients or guests while in the Video Call Waiting Room or once the session has started. Search for existing patients or providers or add the email of participant if they are not in the system yet.
2. This indicates how many participants are currently a part of a session and will notify what the maximum number of participants is for a session.

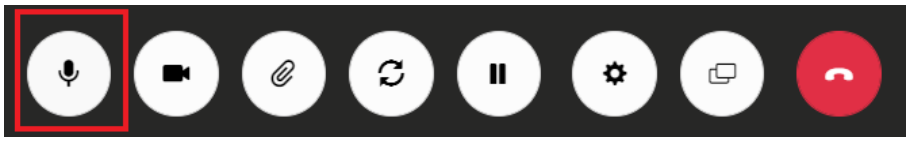
Note: A total of 2 participants can be in a remote session for the basic plan and 12 participants in the premium plan. You can add more participants at an additional cost. Participants include providers (primary and secondary), the patient, and guests.

3. A list of providers in the session is given here. When other participants join a session the circle will turn green once a participant presses the Click to Join Call button.
4. A list of patients in the session is given here. When other participants join a session the circle will turn green once a participant presses the Click to Join Call button.
5. A list of guests in the session is given here. When other participants join a session the circle will turn green once a participant presses the Click to Join Call button.

Joined Session

The following are buttons available during a video session for a provider:

Mute / Unmute your Microphone



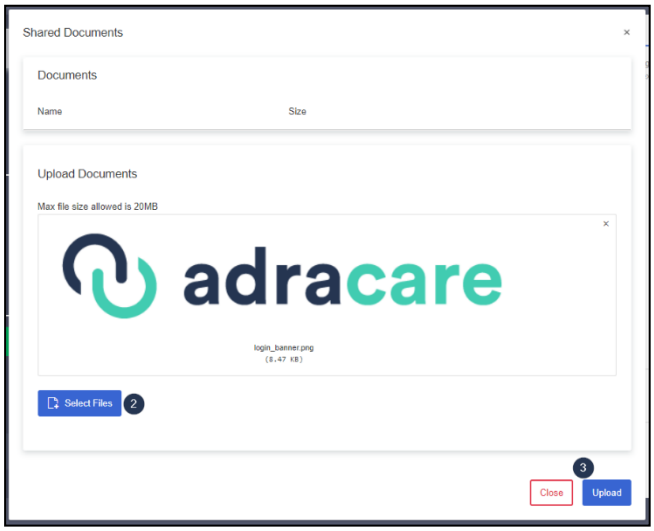
- Click the **microphone** button to **mute or unmute** the device's microphone

Turn Off and On Your Camera

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

Share Attachments

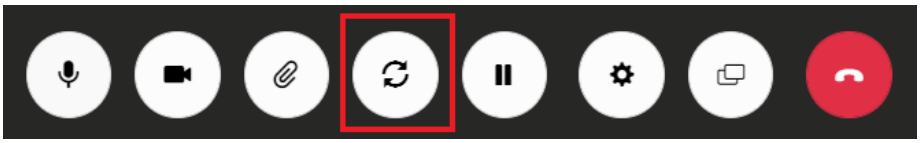
1. Click the **paper clip** to open the **Shared Documents** window



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.

Toggle Between Multiple Cameras (Switch between front and rear-facing cameras on mobile phones or multiple camera devices connected to a computer)

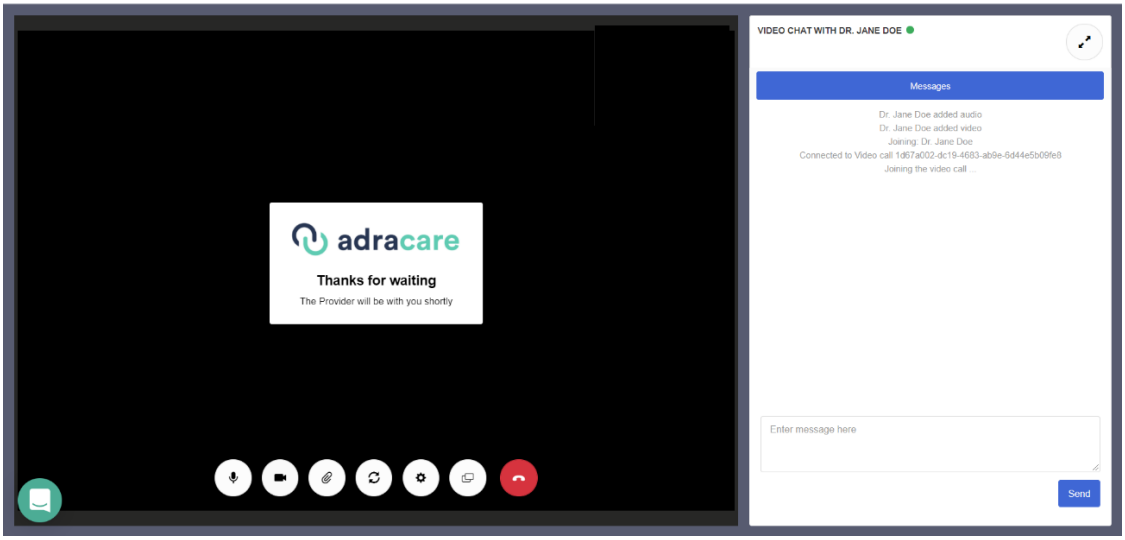


- Click the **arrows in a circle** to **switch** between the front-facing (selfie) to the back-facing cameras or if there are multiple camera devices on a computer.

Hold/Resume

- Click to place the session on hold. The camera and microphone will be turned off.

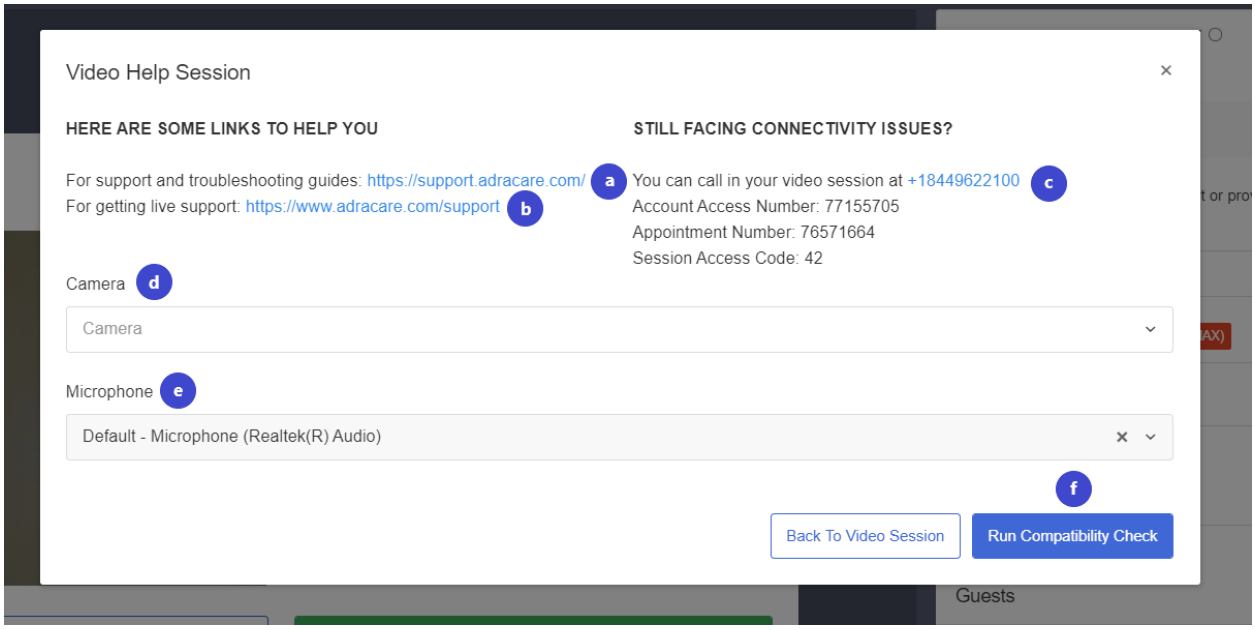
- When the session is on hold, the other participants in the session will have a screen which appears as follows:



- As the provider click the hold button again to resume the session.

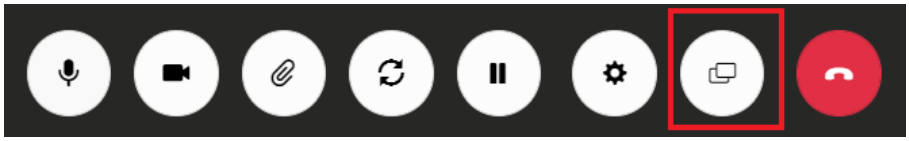
Support

- Click the support button to be directed to the following screen where you can access:

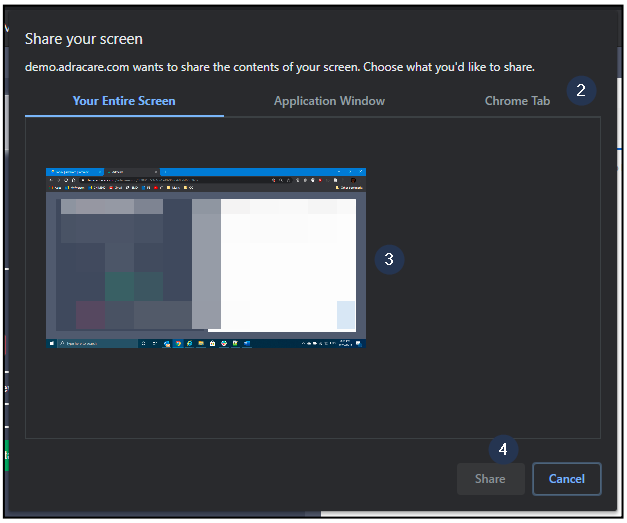


a. Link to for the Adracare knowledge base
b. Link for contact information for the Adracare Support Team
c. Dial-In option information for the session
d. Switch to various cameras if the device has more than one
e. Switch to various microphones if the device has more than one
f. To complete a compatibility check for audio and video

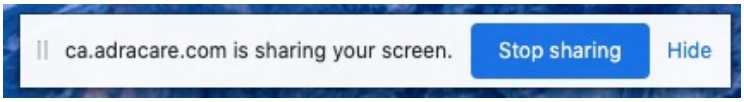
Screenshare



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

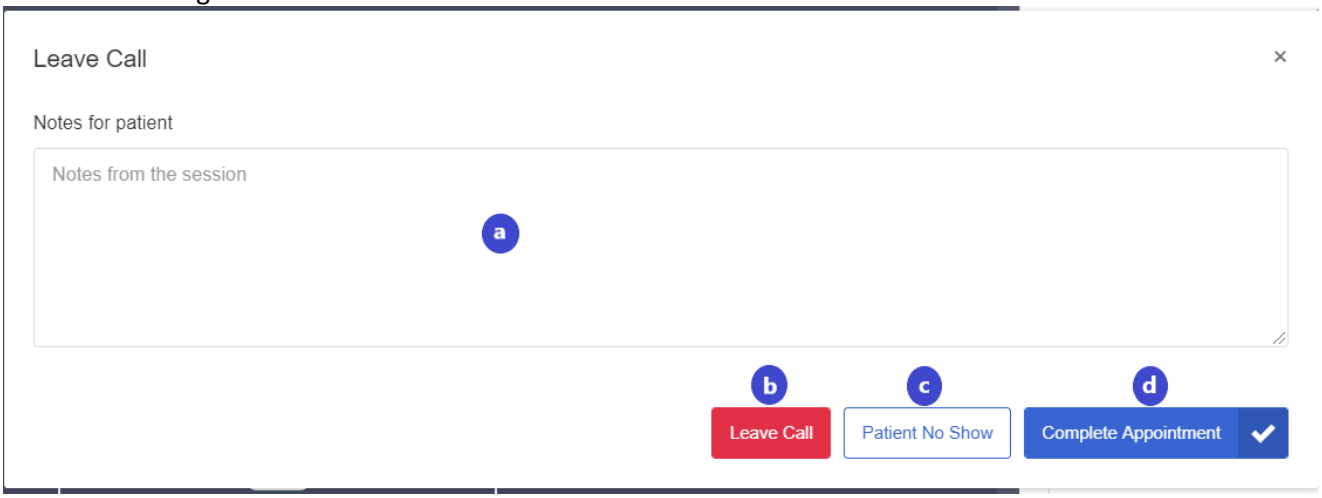


2. Choose the most appropriate screen sharing option for the situation.
3. Select the **screen, window, or tab**.
4. Click the "**Share Screen Button"** again or the "**Stop Sharing**" to stop sharing the screen(s).



End Call

- When the call is done, click the "**End Call**" button to leave the room, which will prompt you to the following screen.



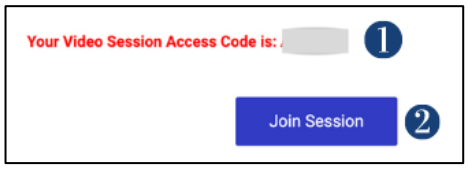
a. Write notes regarding the session in this field.

b. **Leave Call –** this action allows the user to leave the call, but does not mark the appointment as completed. This allows the user and other participants to re-join the session if needed.
c. **Patient No Show -** if the patient does not show up for the appointment
d. **Complete Appointment** – marks the appointment as completed and leave the call. The user and participants of the session will no longer be able to join the session.

Join as a Patient/Guest

Login-less (System Default)

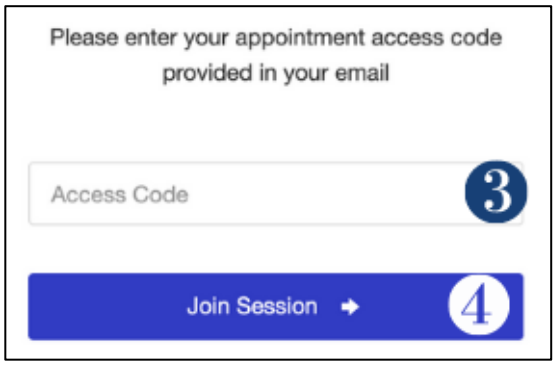
A patient's access link to the appointment will be sent in the appointment confirmation and reminder emails prior to the scheduled start time of the appointment.



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

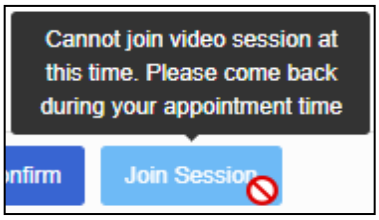
Note: If you did not receive emails from Adracare, please check your Junk/Spam folder.

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



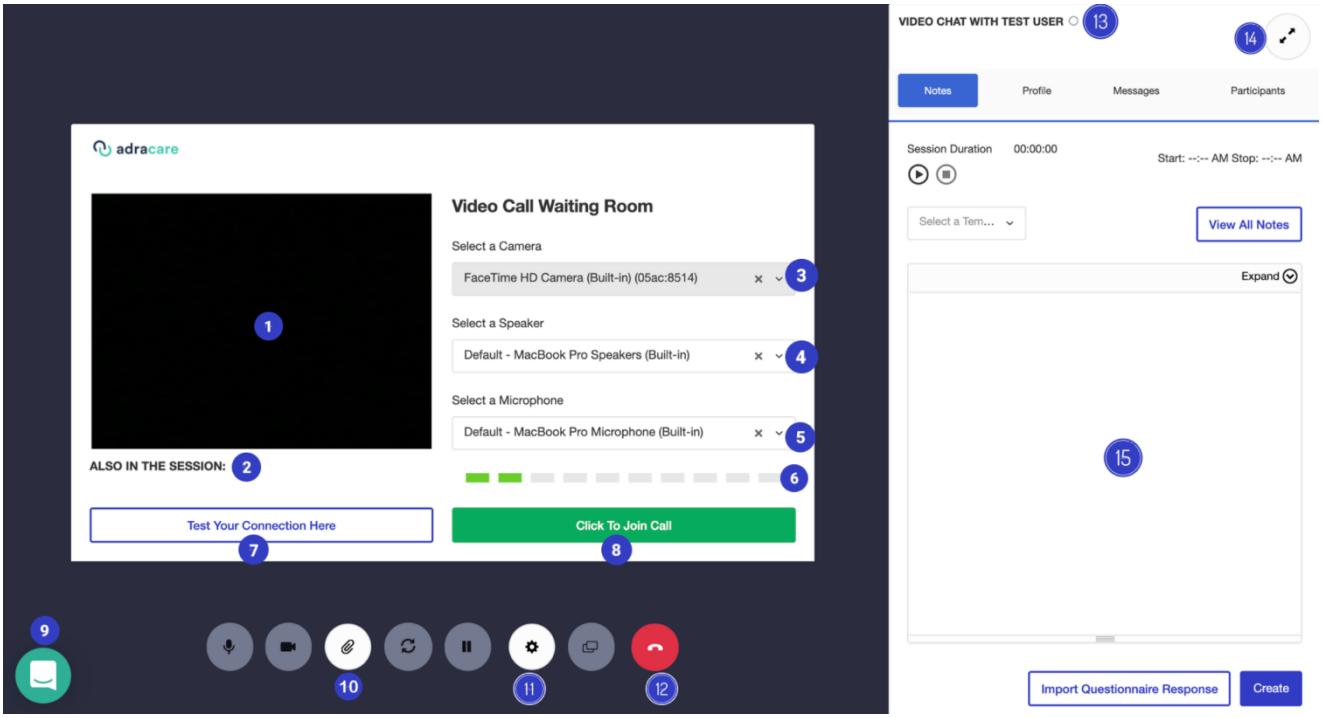
3. Enter the **Video Session Access Code.**
4. Click the "**Join Session**" button to be directed to the **Video Call Waiting Room**.

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

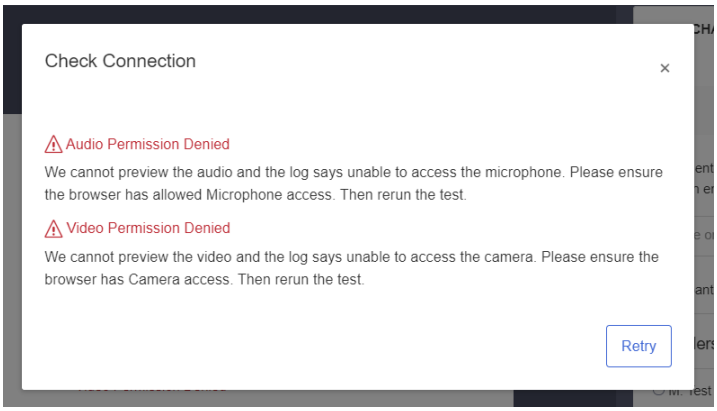


Video Call Waiting Room

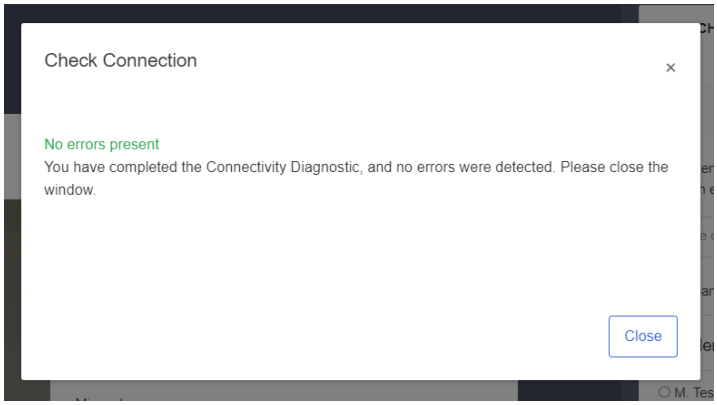
After entering the access code, the user will be directed to the “Video Call Waiting Room” page. On this page users are able to:



1. User can see a camera preview of themselves.
2. User can see who has joined the call (NOTE: Anyone who is only in the Video Call Waiting Room will not appear, this lists the participants who have already pressed the **Click to Join Call** button)
3. Switch various cameras if there is more than one on or connected to the device the user is using.
4. Switch various speakers when using the Chrome browser. On other browsers, speaker will be set to the default.
5. Switch various microphones if there is more than one on or connected to the device the user is using.
6. User can determine if their microphone is working. If the bars are sequentially lighting up in a green colour when they are speaking, or any other sound is being produced this means the microphone is functional and the permissions have been allowed. If there are only grey bars this indicates the microphone is not functional and the permissions may not have been allowed/blocked.
7. User can check if audio and video permissions have been allowed. If permissions have been denied the following screen will appear:



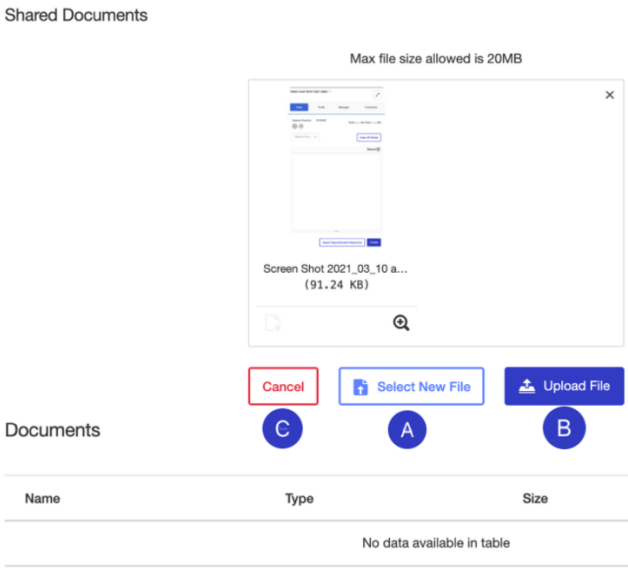
If permissions have been allowed you will the following screen will appear:



8. Join the session to interact with other participants by clicking the **Click to Join Call** button

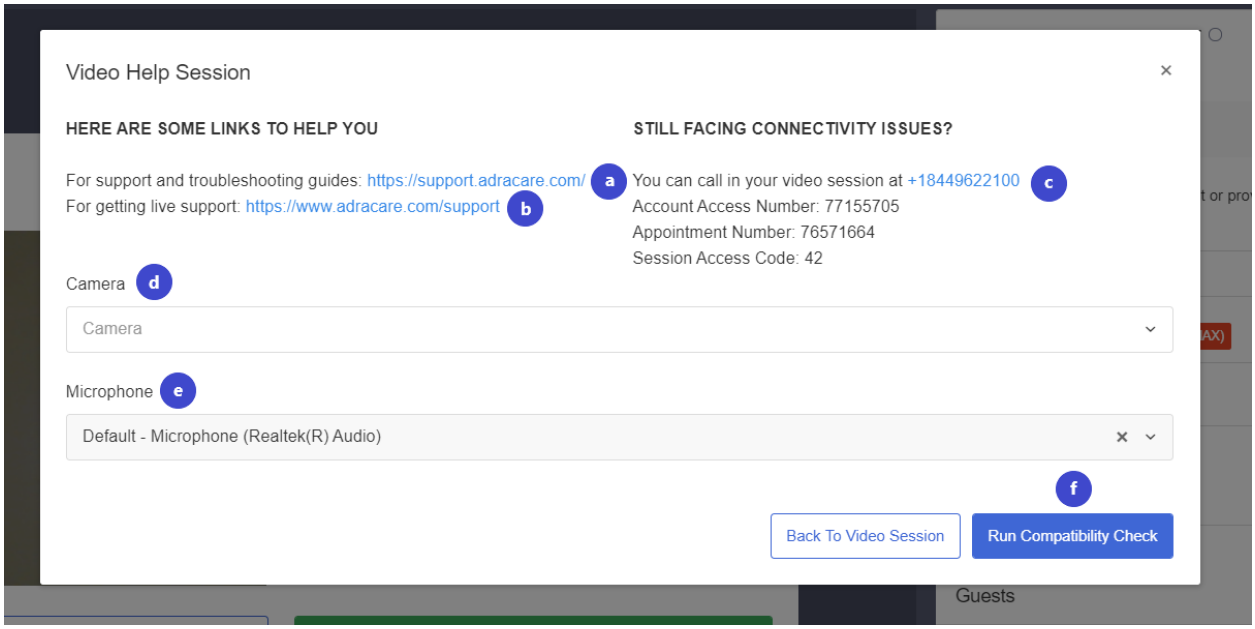
Note: To use video conferencing, allow or enable the use of the Camera and Microphone on the respective browser.

9. Interact with the Adracare Support Team's online live chat agents if technical support is required.
10. Open the **Shared Documents** window.



A. Press the **Select Files** button to select a file to upload from your computer.
B. Click the **Upload** button to send it to the other participants in the session. The recipient will be able to download the file during the session by clicking the paper clip button on their session interface.
C. **Close** the window to return to the session.

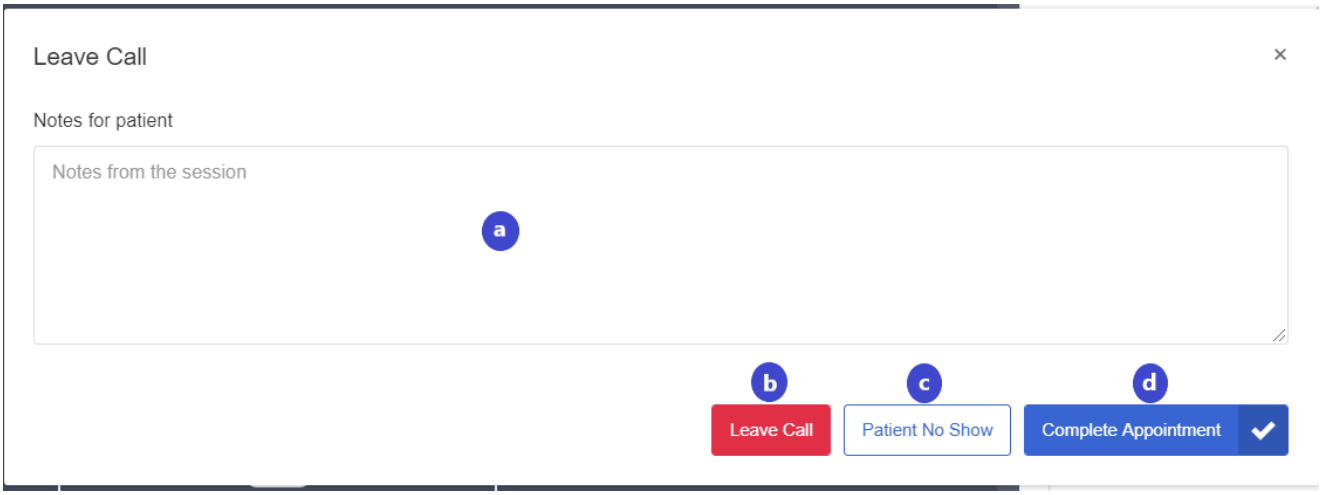
11. Use the support button to access:



a. Link to for the Adracare knowledge base
b. Link for contact information for the Adracare Support Team

c. Dial-In option information for the session
d. Switch to various cameras if the device has more than one
e. Switch to various microphones if the device has more than one
f. To complete a compatibility check for audio and video

12. Leave the call. This will prompt you to the following screen:



a. Write notes regarding the session in this field.
b. **Leave Call –** this action allows the user to leave the call, but does not mark the appointment as completed. This allows the user and other participants to re-join the session if needed.
c. **Patient No Show -** if the patient does not show up for the appointment
d. **Complete Appointment** – marks the appointment as completed and leave the call. The user and participants of the session will no longer be able to join the session.

13. User will know when the patient joins a session as the circle will turn green once the patient presses the **Click to Join Call** button.
14. Toggle to full screen mode. The messages and participants tabs will be collapsed to expand the video feed to the full length of the window.
15. Send and receive messages from the provider. Also, a log is available here to indicate when a user has removed or added audio or video as well as when they have entered of left the session.

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

Joined Session

The following are buttons available during a video session as a patient or guest:

Mute / Unmute your Microphone

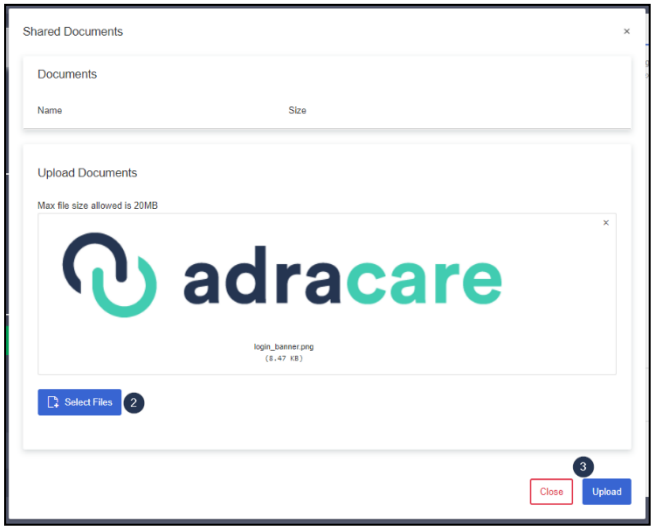
- Click the **microphone** button to **mute or unmute** the device's microphone

Turn Off and On Your Camera

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

Share Attachments

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



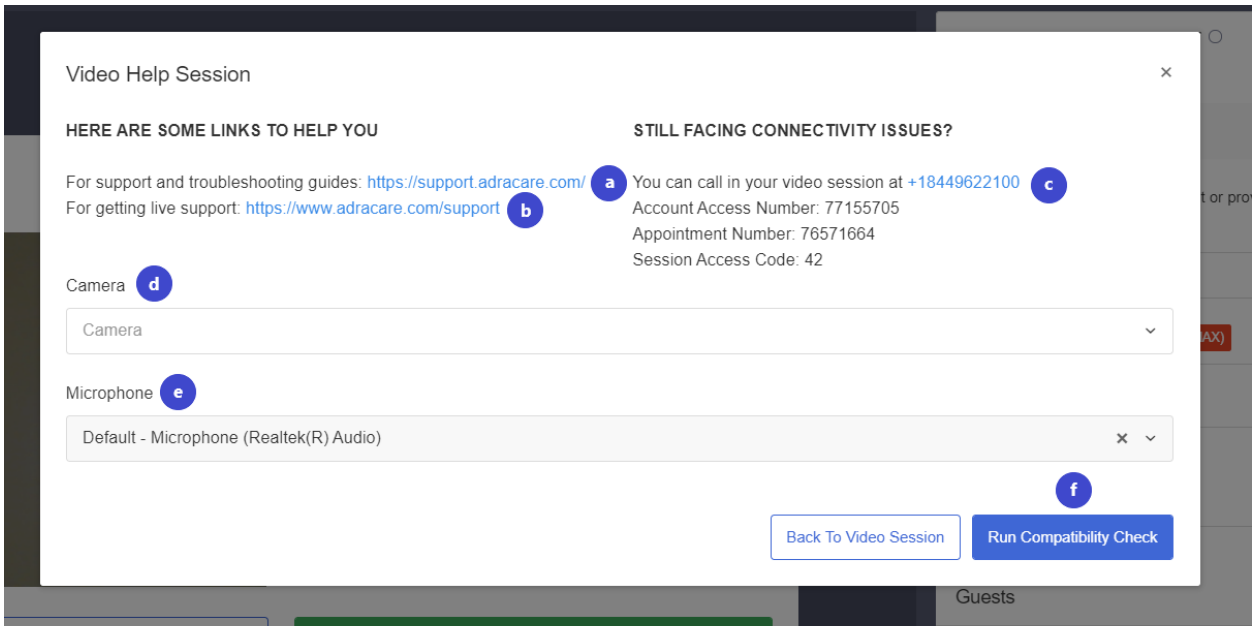
2. **Select a file** from your computer
3. Click **Upload**
4. The provider will be able to download the file during the session. The paper clip also shows on their side.

Toggle Between Multiple Cameras (Switch between front and rear-facing cameras on mobile phones or multiple camera devices connected to a computer)

- Click the **arrows in a circle** to **switch** between the front-facing (selfie) to the back-facing cameras or if there are multiple camera devices on a computer.

Support

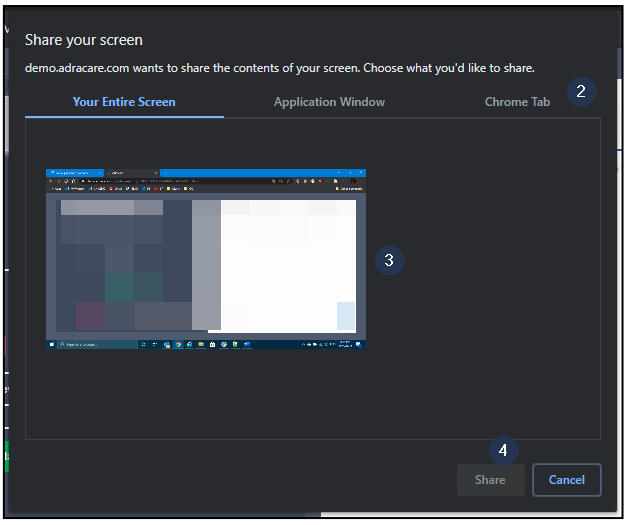
- Click the support button to be directed to the following screen where you can access:



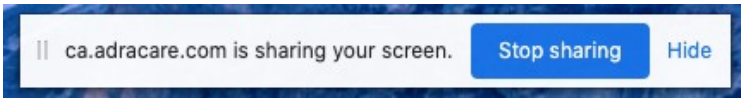
a. Link to for the Adracare knowledge base
b. Link for contact information for the Adracare Support Team
c. Dial-In option information for the session
d. Switch to various cameras if your device has more than one
e. Switch to various microphones if your device has more than one
f. To complete a compatibility check for audio and video

Screenshare

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

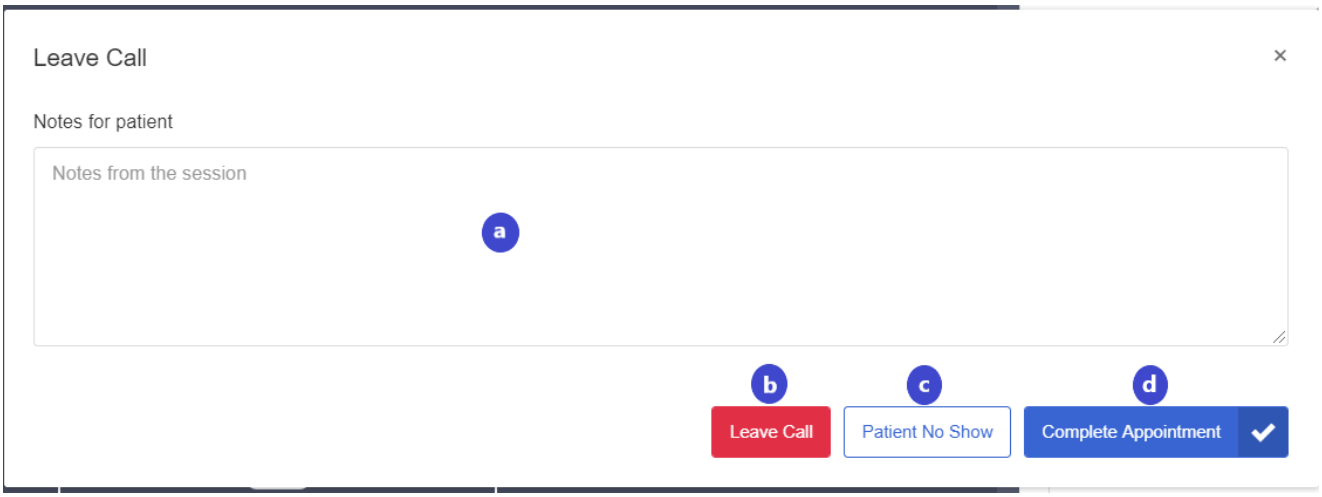


2. Choose the most appropriate screen sharing option for the situation.
3. Select the **screen, window, or tab**.
4. Click the “**Share Screen Button”** again or the “**Stop Sharing**” to stop sharing the screen(s).



End Call

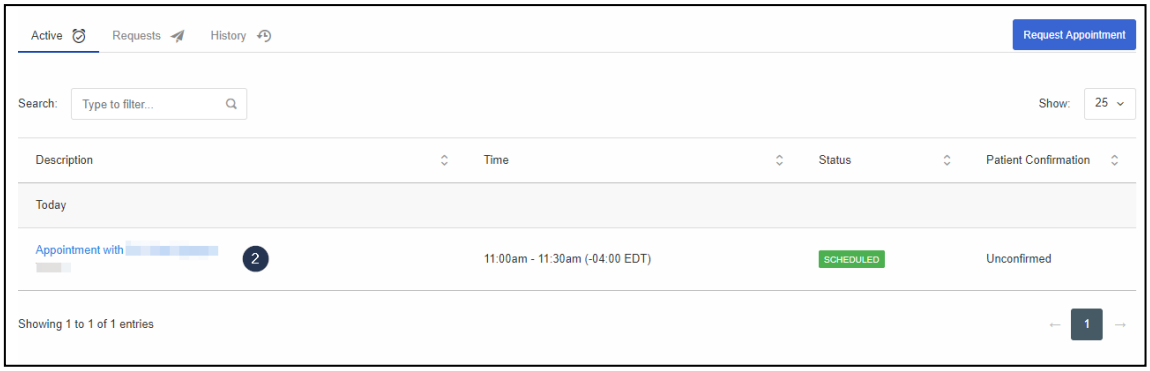
- When the call is done, click the “**End Call**” button to leave the room, which will prompt you to the following screen.



a. Write notes regarding the session in this field.
b. **Leave Call –** this action allows the user to leave the call, but does not mark the appointment as completed. This allows the user and other participants to re-join the session if needed.
c. **Patient No Show -** if the patient does not show up for the appointment
d. **Complete Appointment** – marks the appointment as completed and leave the call. The user and participants of the session will no longer be able to join the session.

Login Required

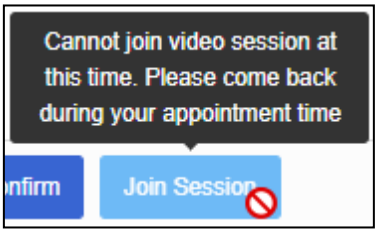
1. After logging into your account, go to **Appointments**.



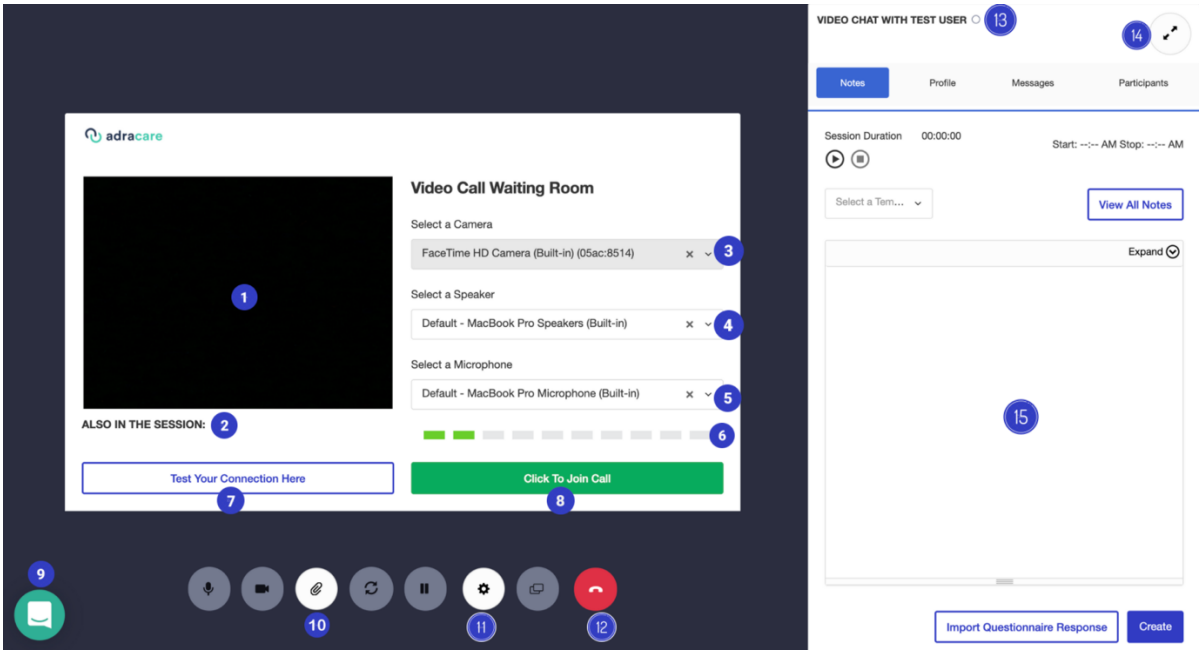
2. Click on the upcoming appointment.

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.



After clicking "**Join Session**", the user will be directed to the "Video Call Waiting Room" page.

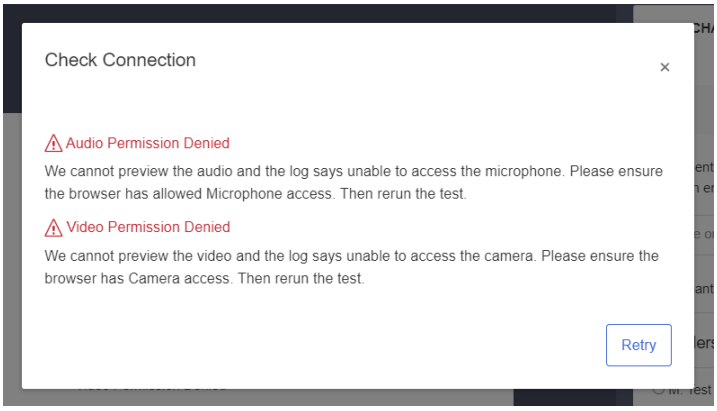


1. User can see a camera preview of themselves.
2. User can see who has joined the call (NOTE: Anyone who is only in the Video Call Waiting Room will not appear, this lists the participants who have already pressed the **Click to Join Call** button)
3. Switch various cameras if there is more than one on or connected to the device the user is using.
4. Switch various microphones if there is more than one on or connected to the device the user is using.
5. User can determine if their microphone is working. If the bars are sequentially lighting up in a green colour when they are speaking, or any other sound is being produced this means the

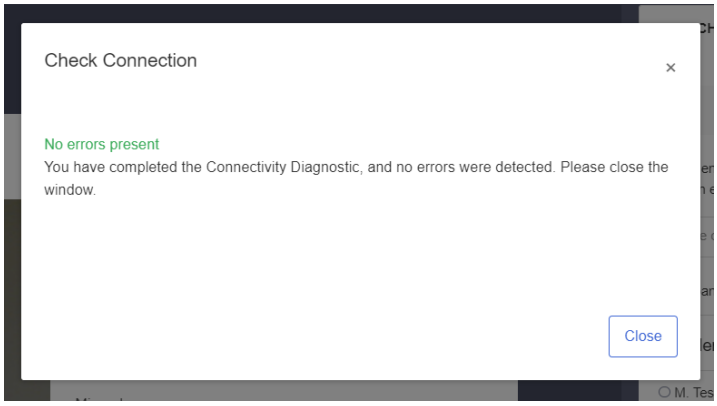
microphone is functional and the permissions have been allowed. If there are only grey bars this indicates the microphone is not functional and the permissions may not have been allowed/blocked.

6. User can check if audio and video permissions have been allowed. If permissions have been denied the following screen will appear:

Note: The user can run the same check prior to an appointment. For more information, go to page 59 of this user guide.



If permissions have been allowed you will the following screen will appear:



7. Join the session to interact with other participants by clicking the **Click to Join Call** button

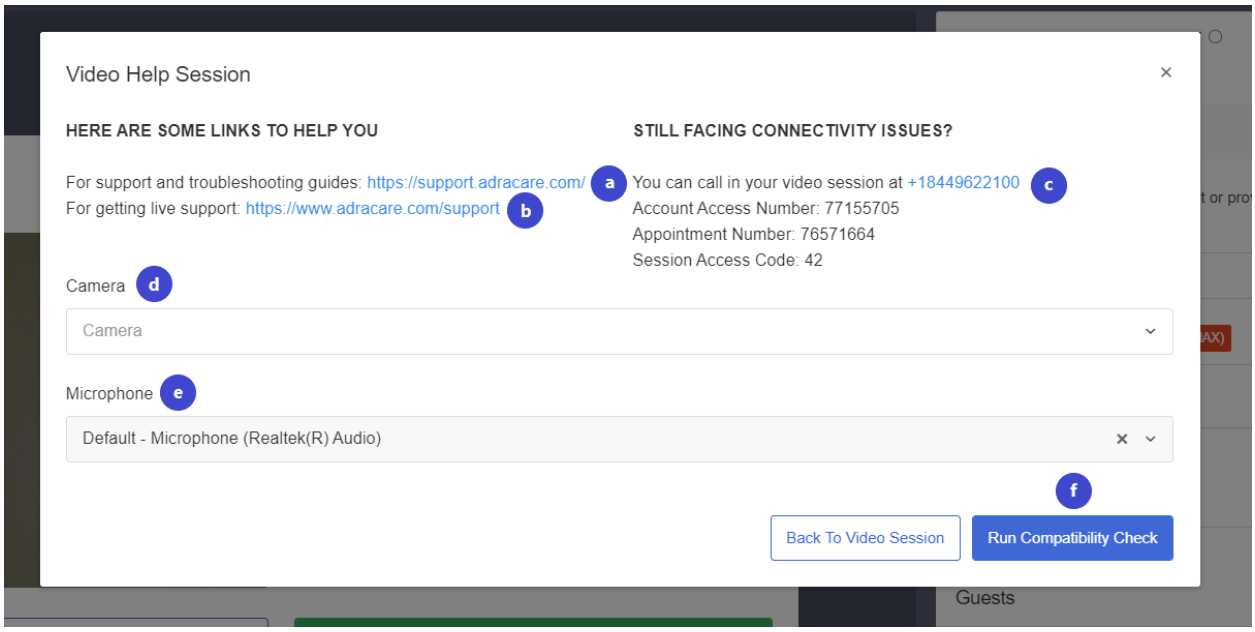
Note: To use video conferencing, allow or enable the use of the Camera and Microphone on the respective browser.

8. Interact with the Adracare Support Team's online live chat agents if technical support is required.

9. Open the **Shared Documents** window.

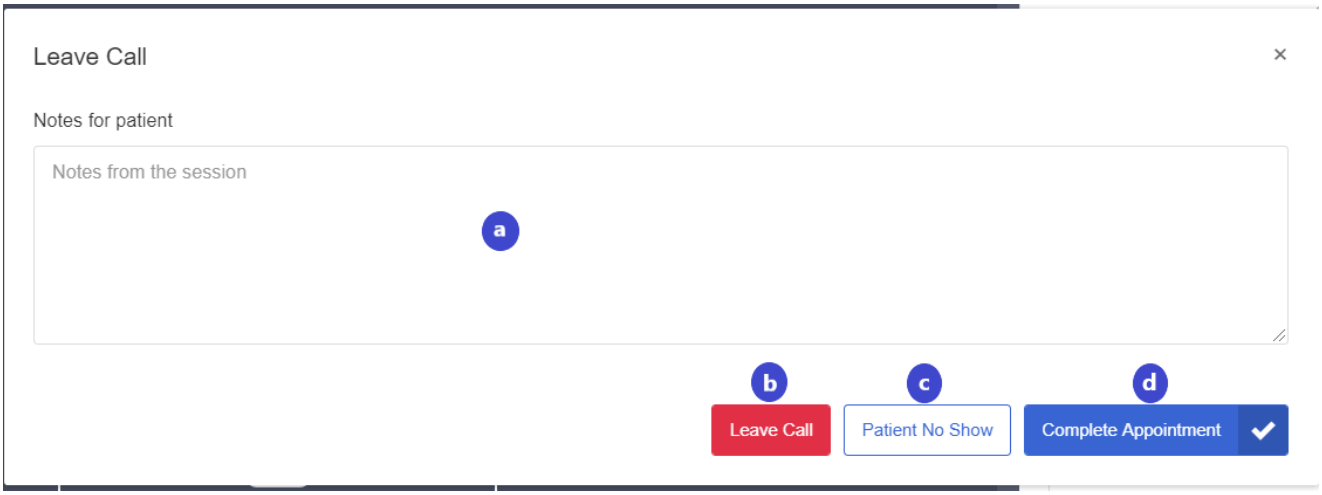
   A. Press the **Select Files** button to select a file to upload from your computer.
   B. Click the **Upload** button to send it to the other participants in the session. The recipient will be able to download the file during the session by clicking the paper clip button on their session interface.
   C. **Close** the window to return to the session.

10. Use the support button to access:



a. Link to for the Adracare knowledge base
b. Link for contact information for the Adracare Support Team
c. Dial-In option information for the session
d. Switch to various cameras if the device has more than one
e. Switch to various microphones if the device has more than one
f. To complete a compatibility check for audio and video

11. Leave the call. This will prompt you to the following screen:



a. Write notes regarding the session in this field.
b. **Leave Call –** this action allows the user to leave the call, but does not mark the appointment as completed. This allows the user and other participants to re-join the session if needed.
c. **Patient No Show -** if the patient does not show up for the appointment
d. **Complete Appointment** – marks the appointment as completed and leave the call. The user and participants of the session will no longer be able to join the session.

12. User will know when the patient joins a session as the circle will turn green once the patient presses the **Click to Join Call** button.
13. Toggle to full screen mode. The messages and participants tabs will be collapsed to expand the video feed to the full length of the window.
14. Send and receive messages from the provider. Also, a log is available here to indicate when a user has removed or added audio or video as well as when they have entered of left the session.

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

Joined Session

The following are buttons available during a video session as a patient:

Mute / Unmute your Microphone

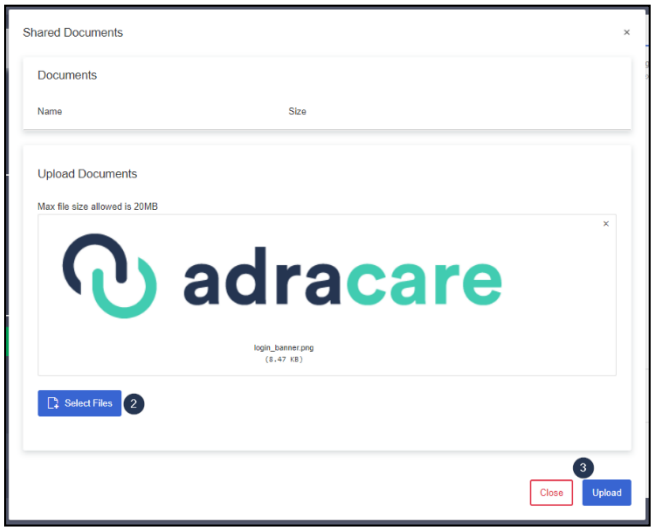
- Click the **microphone** button to **mute or unmute** the device's microphone

Turn Off and On Your Camera

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

Share Attachments

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



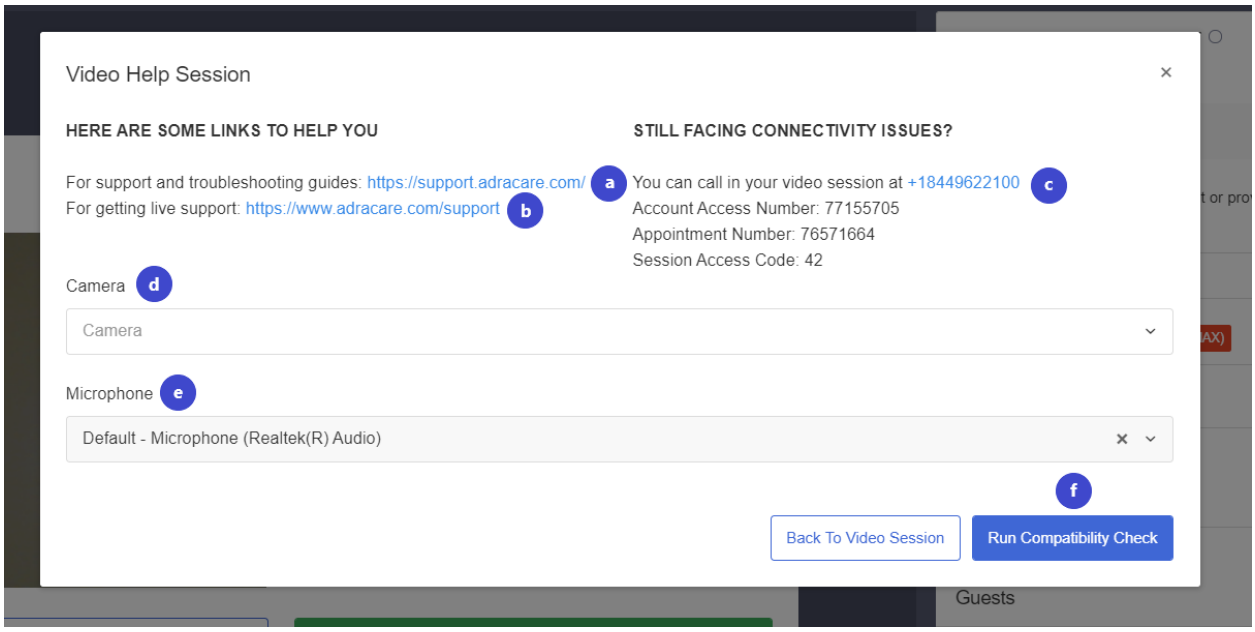
2. **Select a file** from your computer
3. Click **Upload**
4. The provider will be able to download the file during the session. The paper clip also shows on their side.

Toggle Between Multiple Cameras (Switch between front and rear-facing cameras on mobile phones or multiple camera devices connected to a computer)

- Click the **arrows in a circle** to **switch** between the front-facing (selfie) to the back-facing cameras or if there are multiple camera devices on a computer.

Support

- Click the support button to be directed to the following screen where you can access:



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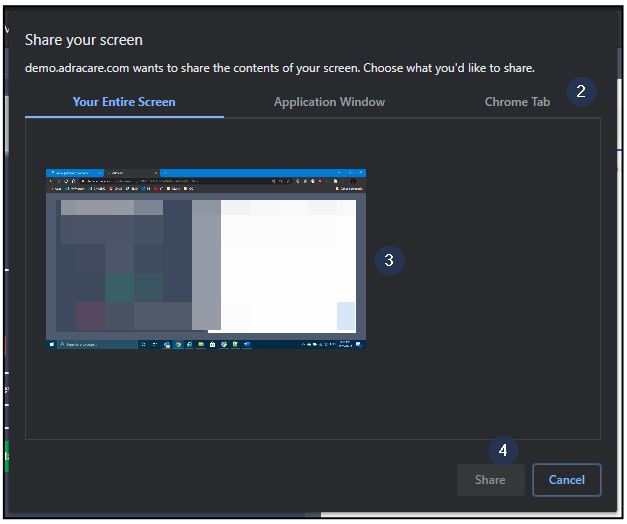
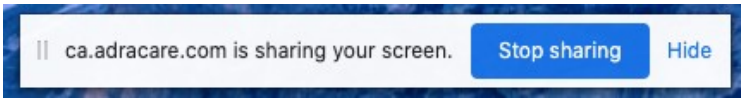
c. Dial-In option information for the session
d. Switch to various cameras if your device has more than one
e. Switch to various microphones if your device has more than one
f. To complete a compatibility check for audio and video

Screenshare

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

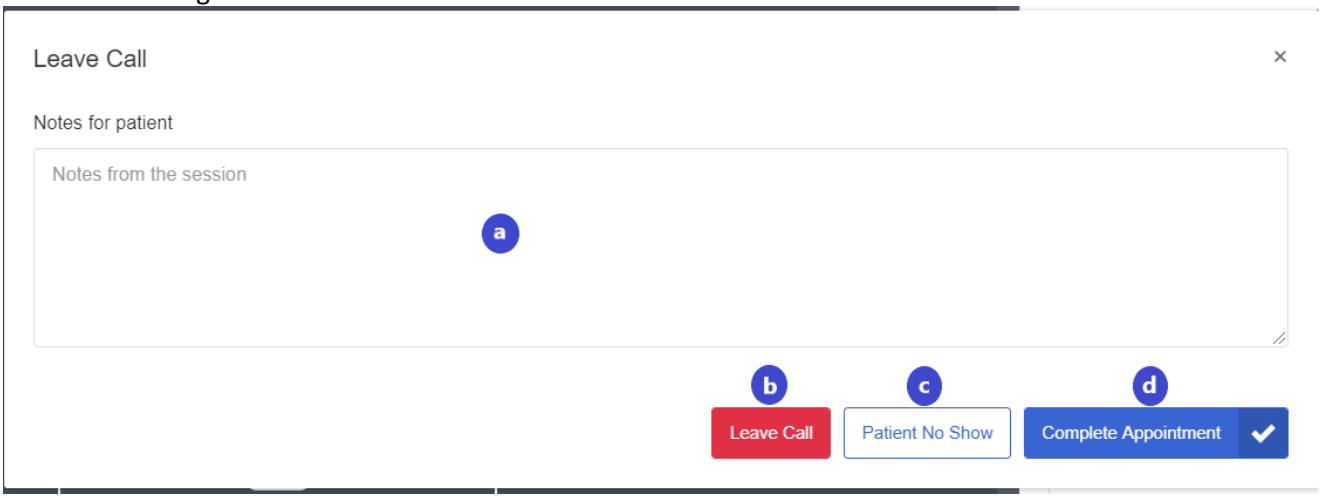


2. Choose the most appropriate screen sharing option for the situation.
3. Select the **screen, window, or tab**.
4. Click the "**Share Screen Button"** again or the "**Stop Sharing**" to stop sharing the screen(s).



End Call

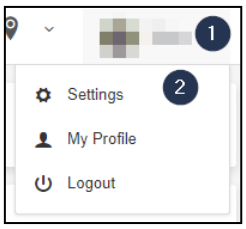
- When the call is done, click the "**End Call**" button to leave the room, which will prompt you to the following screen.



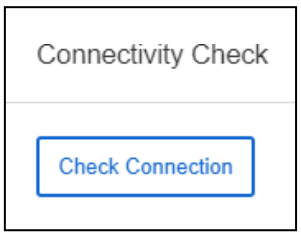
a. Write notes regarding the session in this field.
b. **Leave Call –** this action allows the user to leave the call, but does not mark the appointment as completed. This allows the user and other participants to re-join the session if needed.
c. **Patient No Show -** if the patient does not show up for the appointment
d. **Complete Appointment** – marks the appointment as completed and leave the call. The user and participants of the session will no longer be able to join the session.

Video Session Troubleshooting

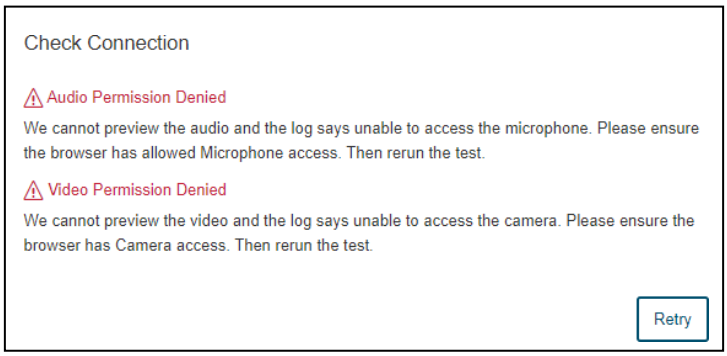
Check Your Connection
Run a diagnostic test on your computer prior to having a virtual care appointment to ensure that you can join without any issues.



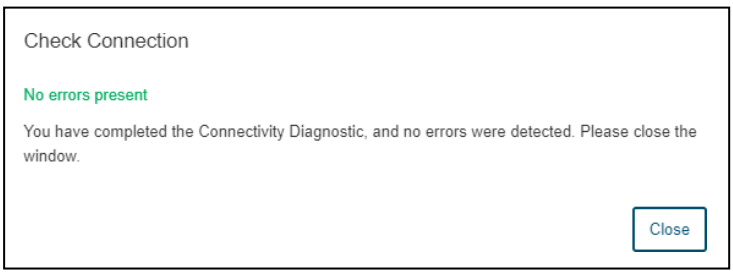
1. Click the **username** at the top-right side of the page.
2. Click "**Settings**".



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.

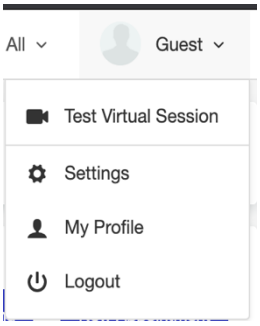


5. If the test is successful, it will confirm that there are no issues detected.

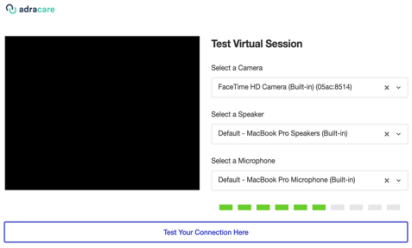
Run a test session before your appointment

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

2. Click "**Test Virtual Session"**



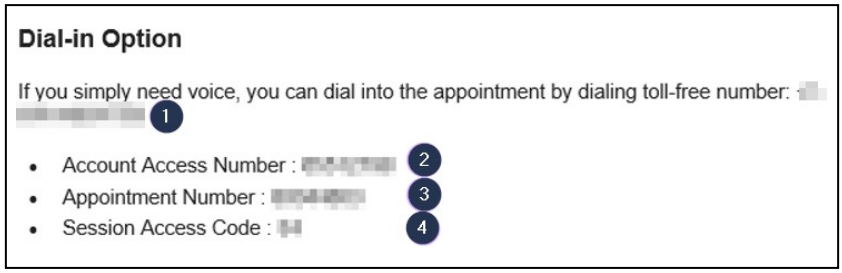
3. A new tab opens and you can check if your browser has access to your microphone and camera like you would in the waiting room



4. You check your connection in this window by clicking "**Test Your Connection Here"**
5. To exit, close the window and return to the original tab

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.

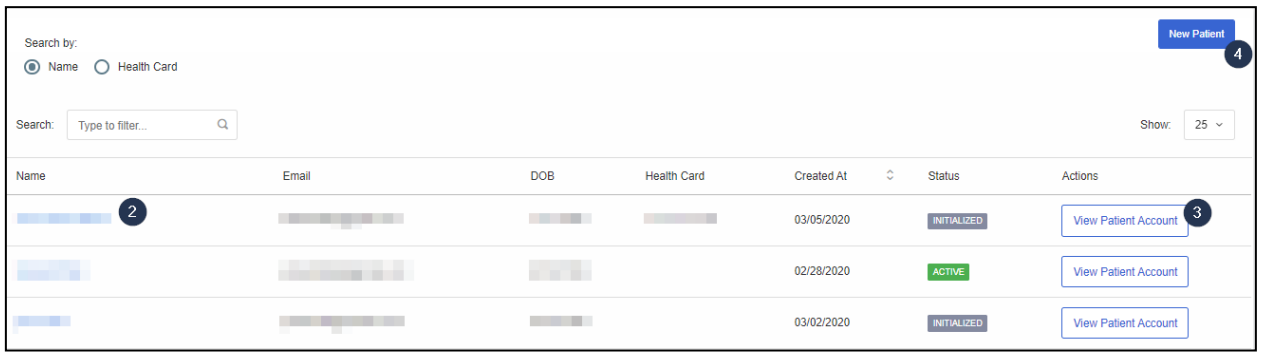
Note: Access codes are not meant to be shared.

5. Patient Administration

All Patients

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

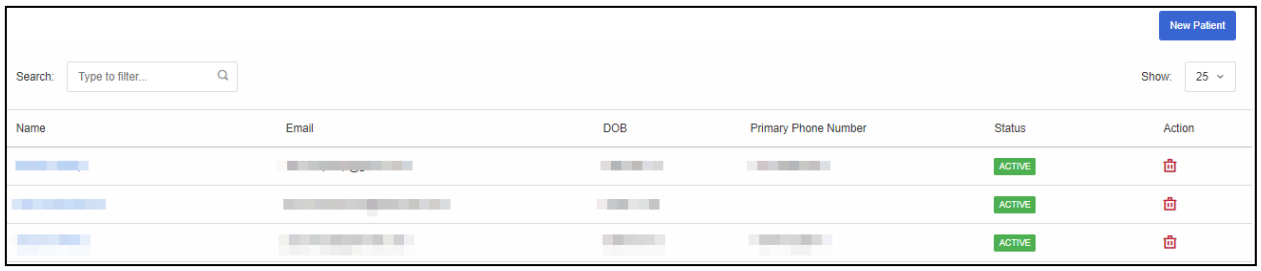
1. Click "**All Patients**".



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 Patient**" to create a new patient. For complete the details on adding a new patient, see the Create a Patient section.

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.



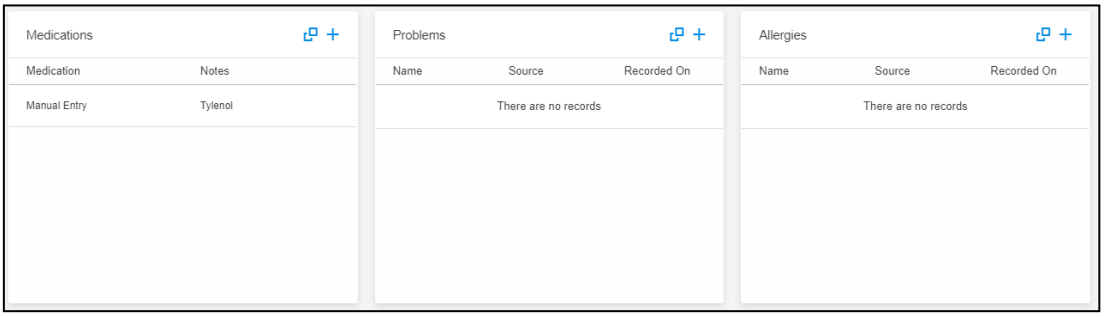
1. Click "**My Patients**".
2. Click "**New Patient**". Complete the details for adding a new patient, see the Create a Patient section.
3. Click a **patient's name** to easily view their **CPP**. For more information on the CPP, see the Cumulative Patient Profile (CPP) section.
4. Click the **Trash Bin** icon to remove a patient from your roster.

Cumulative Patient Profile (CPP)

CPP Overview

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

- Appointment Details
- Patient Profile
- Sessions List



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 (if applicable)

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.

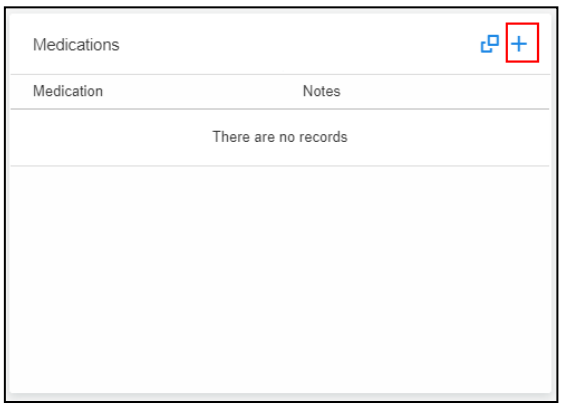
Updating Patient Alerts

1. Click "**Edit**".

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

Adding to the Cumulative Patient Profile (CPP)

Cards can be updated directly in the patient's CPP.



1. Click the "**Add**" icon.
2. Complete or upload information to add to the CPP.

Questionnaires

View Questionnaire

1. Under **“All Patients”** or **“My Patients”**, select the name of the patient to go to the **Patient Profile** or **Sessions.**
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 **Sessions**
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.

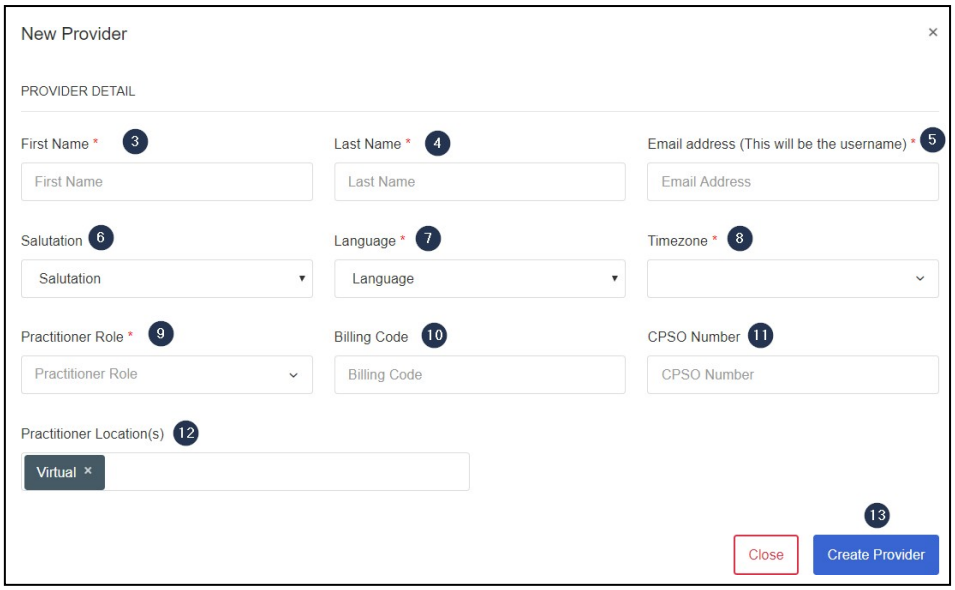
Note: You can make edits to the responses from here and save them.

6. User Administration

Creating a Provider

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

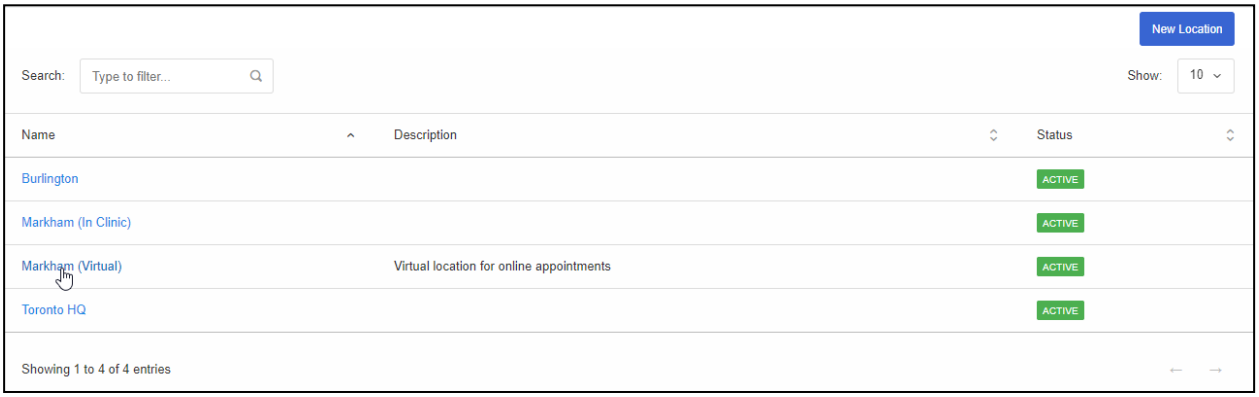
2. Click "**New Provider**" on the top-right corner and the **New provider** window will open.



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 physical and/or virtual **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

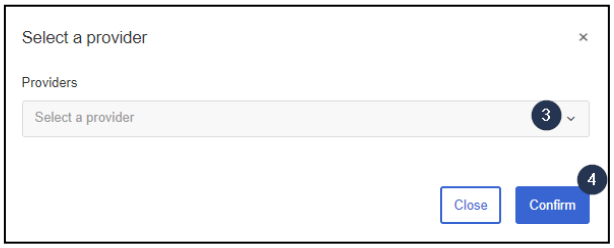
Assigning a Provider to a Location

If a provider needs to work in additional locations physically and/or virtual, they will need to be assigned to those locations respectively.



1. Go to **My Organization>Locations** and select a location.

2. Go to the **Providers List** section and click **Add.**



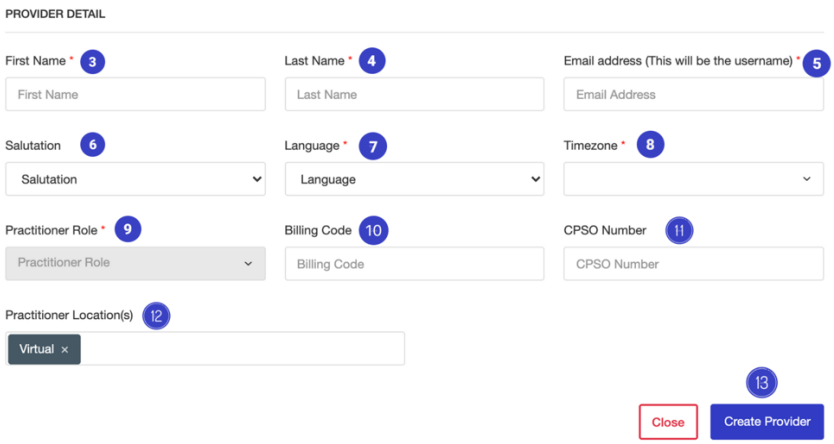
3. Select a **provider** from the drop-down.
4. Click **Confirm** to save the provider to the location.

Creating an Administrator

Use the steps below to create an admin profile.

1. To Create an **Admin**, click on **Providers**.

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

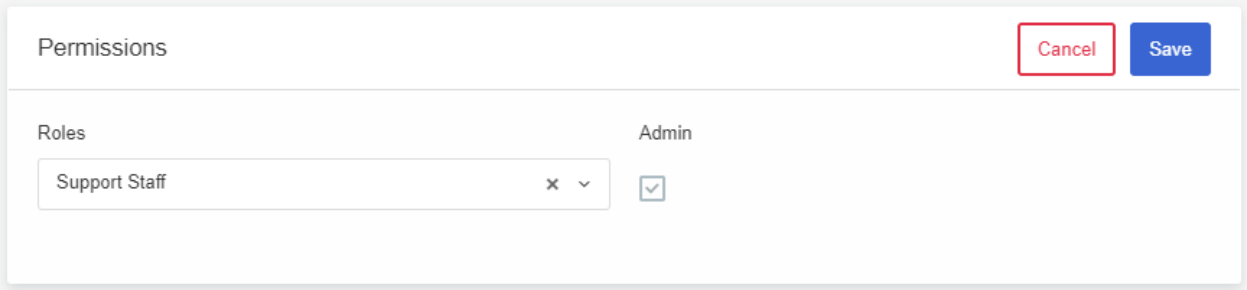


3. Type the provider's **first name**.
4. Type the provider's **last name**.
5. Type the provider's **email address**.
6. If applicable, select the provider's **salutation**.
7. Select the provider's **language** preference.
8. Select the provider's **timezone**.
9. Select ***Provider-Admin*** under the "**Practitioner Role**"
10. If applicable, type the provider's **Billing Code.**
11. If applicable, type the provider's **CPSO Number**.
12. **Practitioner Location(s)** is automatically set to ***virtual*** however, you can add other locations
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

Creating a Support Staff User

Add the Support Staff User

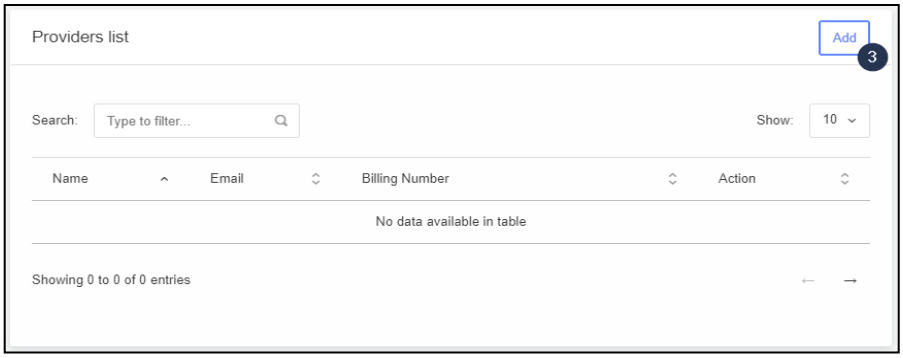
Following the "Create An Administrator" instructions to add the Support Staff User to the system.



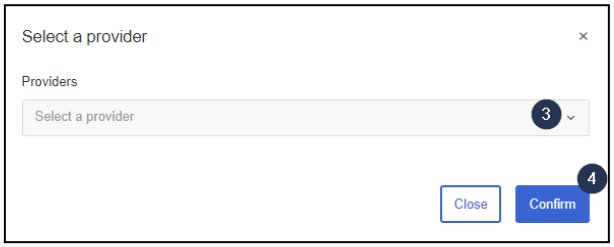
1. *In **step 9**,* Under the **Provider Role,** select the **Support Staff** role in the dropdown to assign the user.
2. **Search** for support staff in **Providers**, and Click on their name
3. Under Permissions, Click on **Admin**
4. Click **Save** to save the changes to the profile.

Assign Providers to the Support Staff

1. Under "**Admin**", click **Providers**.
2. Click the Support Staff's name to open their **Account Settings**.



1. Go to the **Providers List** section and click **Add.**



2. Select a **provider** from the drop-down.
3. Click **Confirm** to save the provider to the Support **Staff**.
4. The Providers will be listed in the "My Providers" tab when they log in.

Note: Patients who have appointment history with the assigned providers can be seen by the Support Staff in My Patients.

Create a Patient

There are three methods to create a patient:

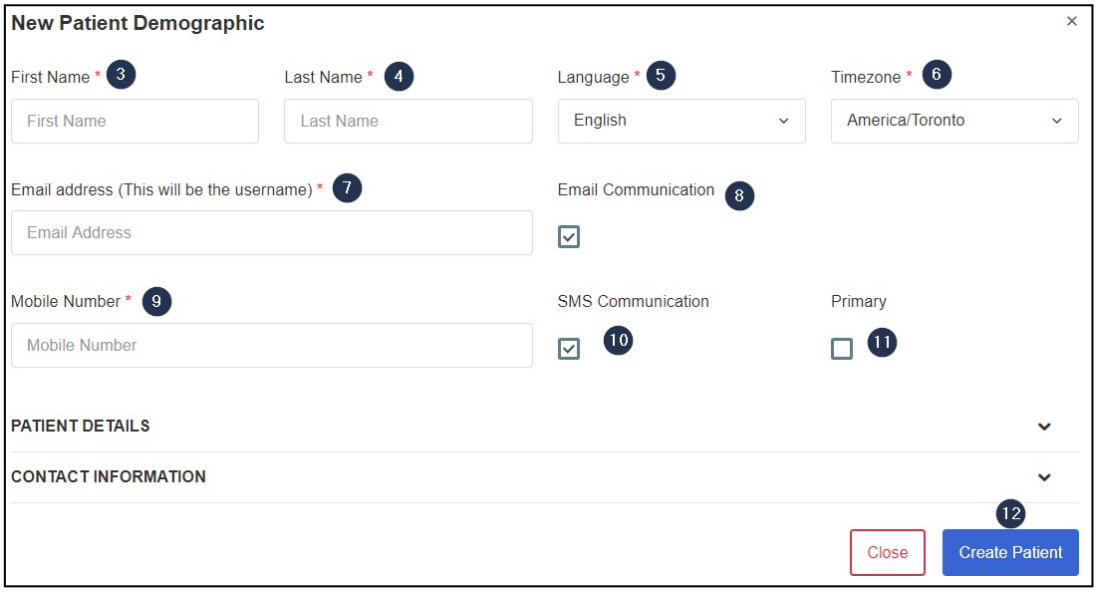
- All Patients
- My Patients
- When creating an appointment

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. **Email Communication** consent is selected by default.

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.**

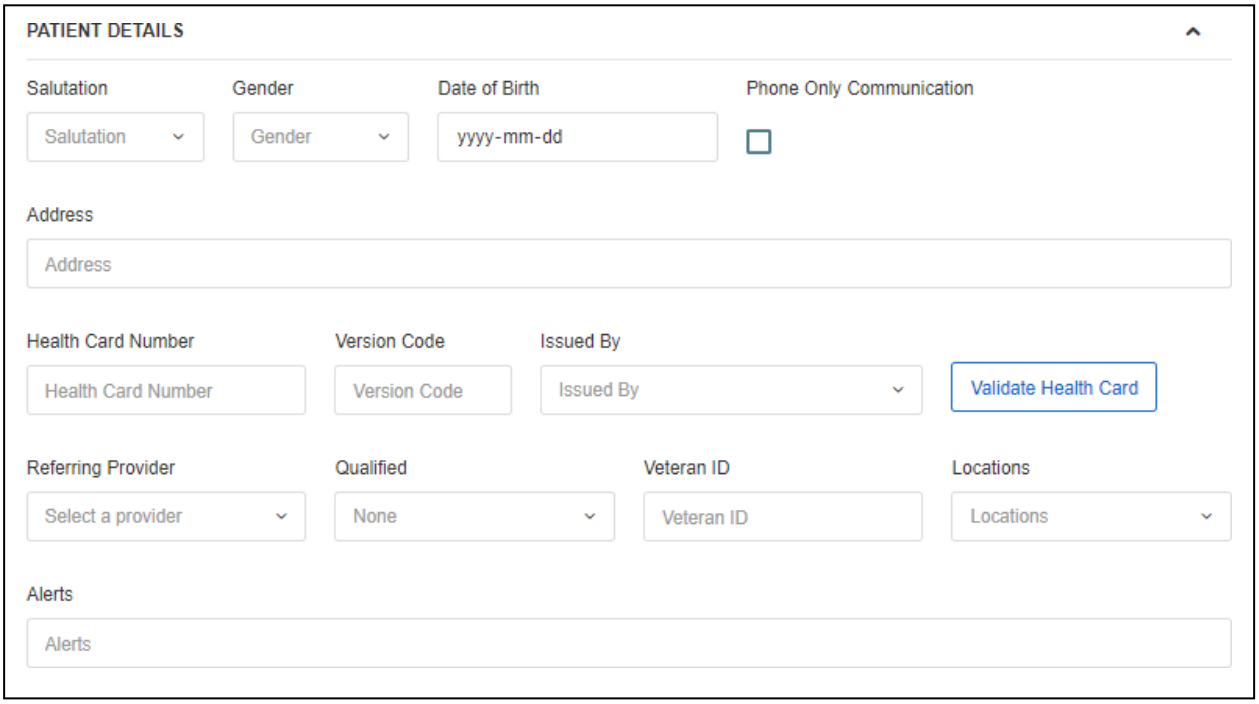
12. Click "**Create Patient**".
13. An email will be sent to the user to claim their account which is valid for **72 hours**. Use the following guides to activate the user's account: Claiming an Account

Note: Patients are not required to sign up for an account to use the system. They are also sent an access link and code via and email or SMS to join a session directly. Go here for more information on how to join an online session.

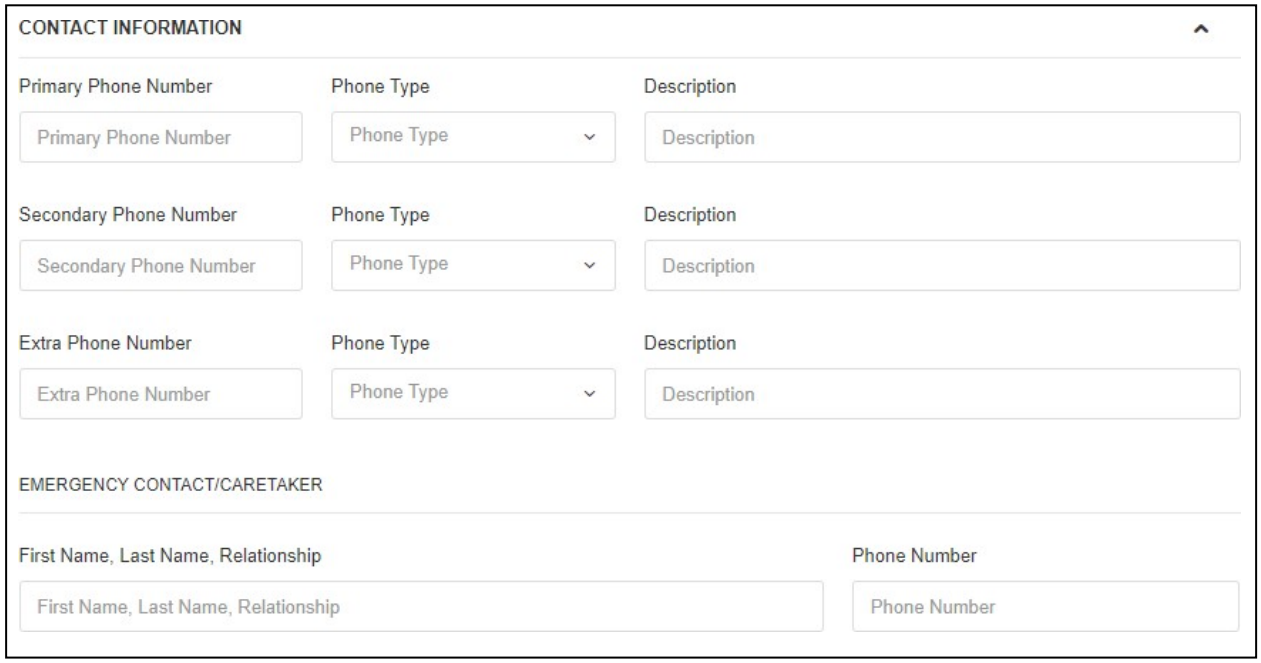
Advanced Patient Settings

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.

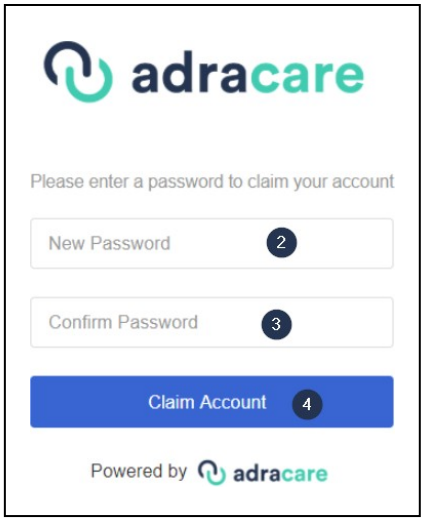


14. Add additional patient **contact numbers**.
15. Add a **patient's emergency contact** information.
16. When finished filling out the desired fields, click "**Create Patient**" to create the patient profile.
17. An email will be sent to the user to claim their account which is valid for **72 hours**. Use the following guides to activate the user's account: Claiming an Account

Claiming an Account

Use the steps below to claim an account. After an administrator or provider 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.

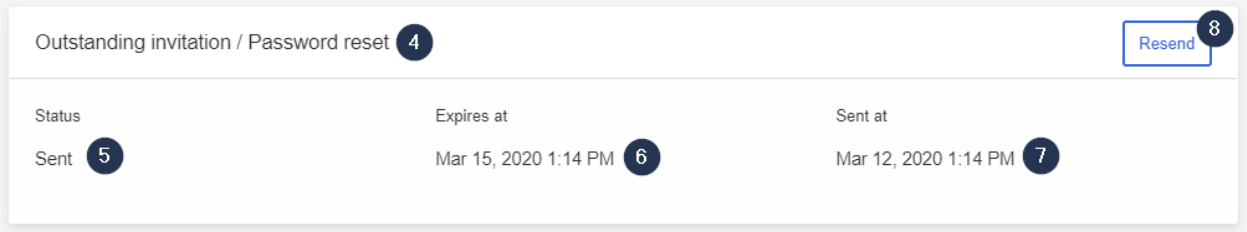
Note: Patients are not required to sign up for an account to use the system. They are also sent an access link and code via and email or SMS to join a session directly. Go here for more information on how to join an online session.

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*".
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.

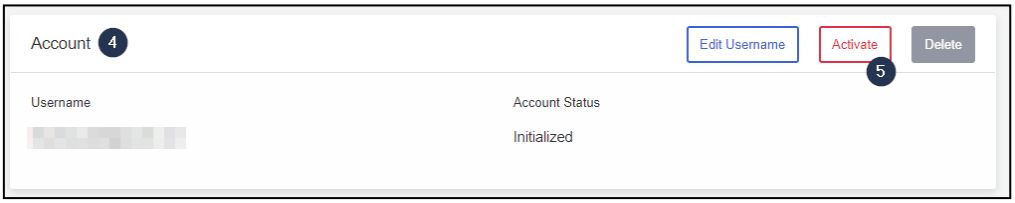
Statuses defined

- **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.

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.

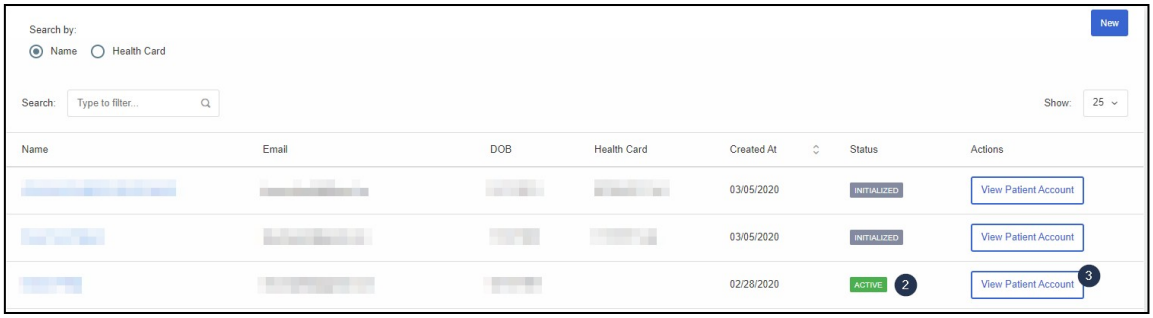


4. Go to the **Account** component.
5. Click **Activate**.
6. The user's status will be updated to **Activated**.

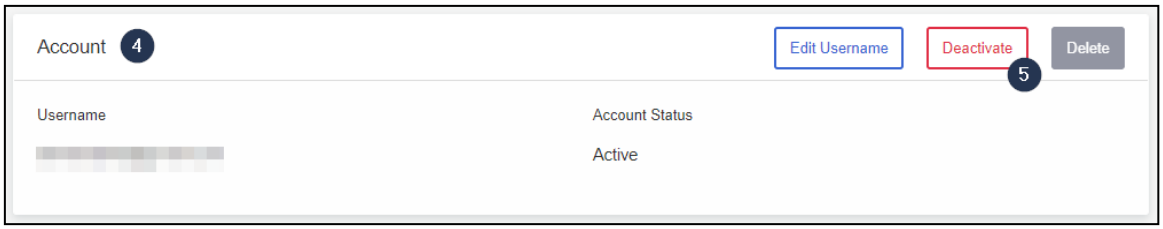
Deactivating a User Account

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.



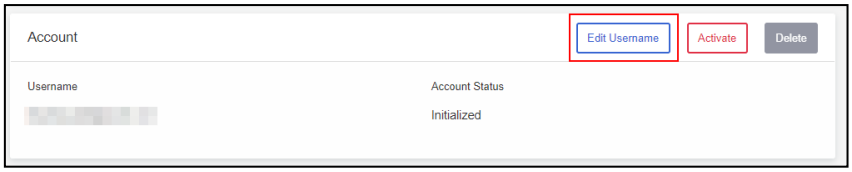
4. Go to the **Account** component.
5. **Deactivate** the account.
6. The user's status will be updated to **Deactivated**.

Note: Users that have appointments history can only be deactivated and not deleted for auditing purposes.

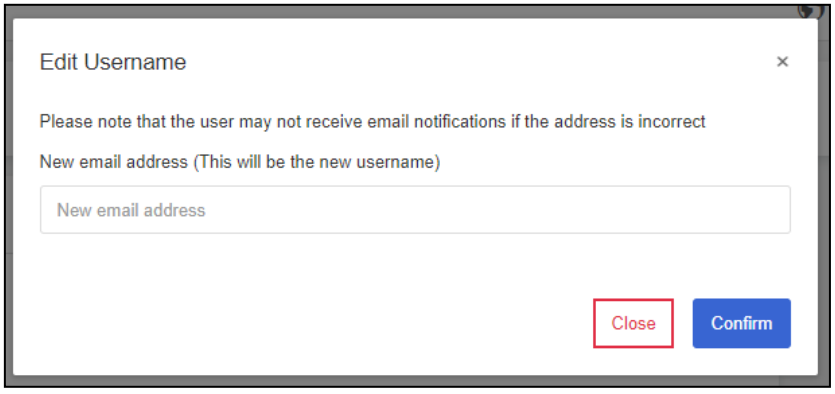
Changing a Username

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 **All 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. Organization Setup

Organization Settings

Organization Logos

Please use transparent background images for best results.

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

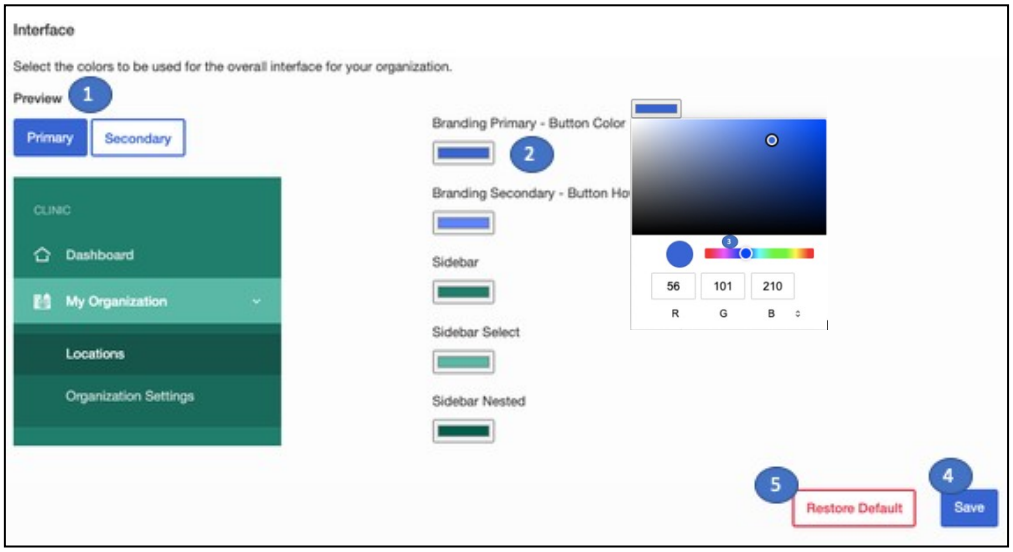
1. Click “**Select Image**” to choose the image you want to upload.

2. Click “**Save**” to save the image.

3. Click “**Clear Image**” if you would like to revert back to the default logo

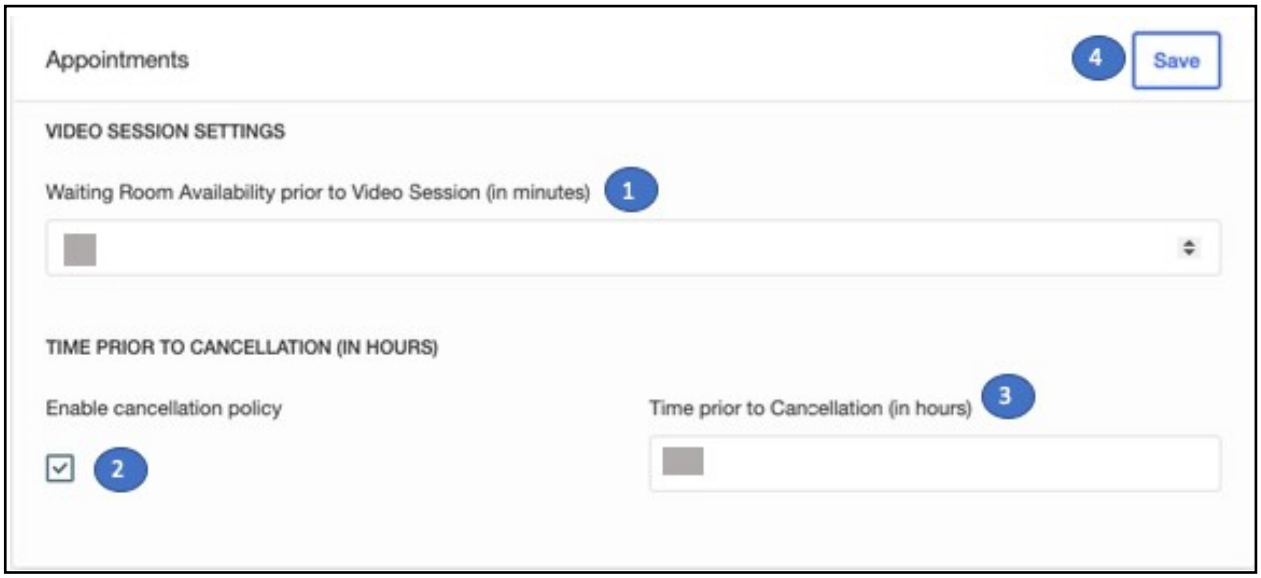
Interface

This allows you to select the colours to be used for the overall interface for your organization



1. This shows you a "**Preview**" of the selected colours and how they will look on the interface
2. Click the colour under the category you want to change to open the menu for selecting a new colour
3. Use the slider to find the colour you want and the cursor in the colour gradient to fine tune your selection
4. Click "**Save"** to save your changes
5. Click "**Restore Default"** if you do not want to save and to start over

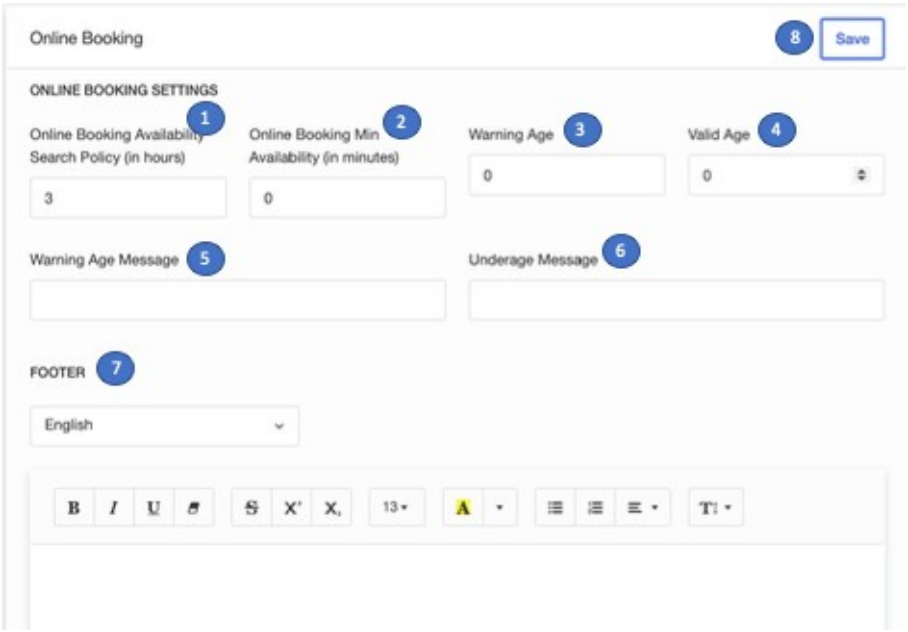
Appointments



1. Enter the "**Waiting Room Availability"** prior to video session (in minutes), this value determines when participants may enter the session.
    - For example, if this value is 15, participants may enter a video session up to 15 minutes prior to the scheduled start time of the appointment.
2. Enable or disable the "**Cancellation Policy"**
3. Enter a **"Time prior to Cancellation (in hours)"**
4. Click "**Save**"

Online Booking

Online booking settings can be changed using the panel seen here:



1. **“Online Booking Availability Search Policy (in hours)**” iThis value sets the minimum number of hours where the system will search to display the first available appointment for online registration.
2. **“Online Booking Min Availability (in minutes)**” This value sets the minimum minutes to be added to the current time in order to filter the result IF healthcare service appointment_buffer_hours_ is not there during online intake.
3. “**Warning age (year)”** this value is used for practices with an online-intake process. If users enter an age where, between valid age and warning age, the user will get a warning message when booking an appointment using the online-intake; this warning does not stop user from booking
4. “**Valid age (year)”** this is the minimum age that a patient must be when going through online intake/booking an appointment. If they do not meet the minimum age, they will be stopped from booking the appointment.
5. “**Warning Age Message”** message that displays when user enters an age between the warning age and valid age
6. “**Underage Message”** message that displays when user enters an age below the valid age.
7. Enter a **“Footer”**, message that displays at the bottom of your online booking page

Documents

This panel allows users to change document settings for their organization

1. Enter a **Start Date** for the appointment log report
2. Enter an **End Date** for the appointment log report
3. Click "**Generate**" to generate a .csv report of the appointments that took place between the start and end dates
4. "**Autosave (in minutes)**" determines how often your Session Notes will automatically be saved
5. Click "**Save**" to save your changes

Accounts

Account settings for your organization can be adjusted here to fit organization security standards.

1. Enter your **password expiration policy (in months)**, this determines how often a user will have to change their password
2. Enter your **Maximum saved passwords** value, this determines how often users may reuse an old password. For example, if you enter 3, a new user must change their password 3 times before they may use their original password again

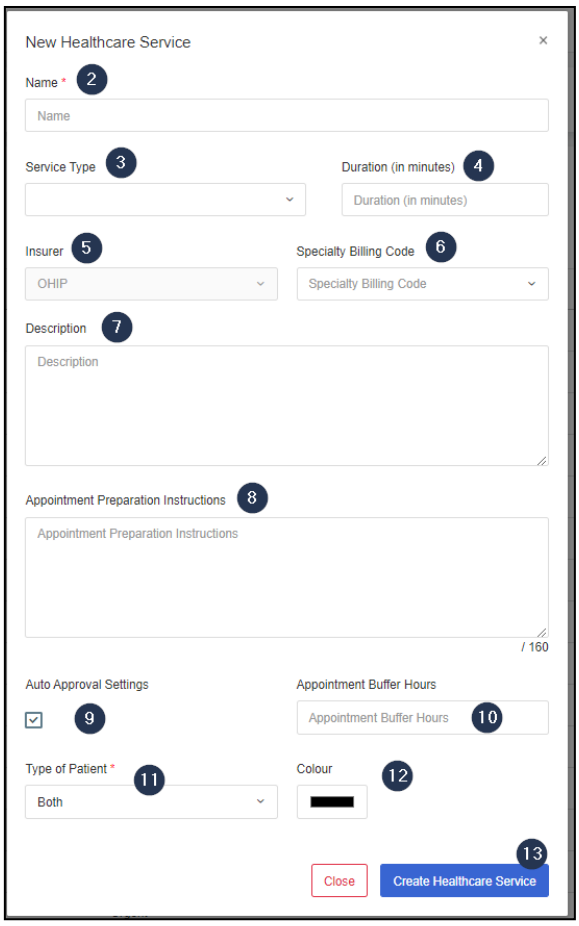
Healthcare Service Templates

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**".

Adding a Service Template

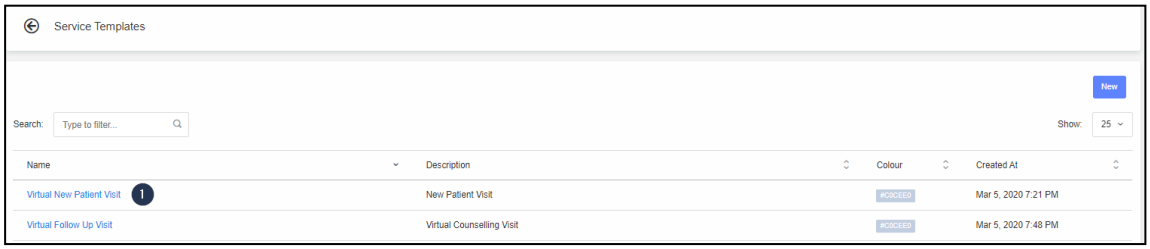
1. Click “**New**” to open the “New Healthcare Service” modal.



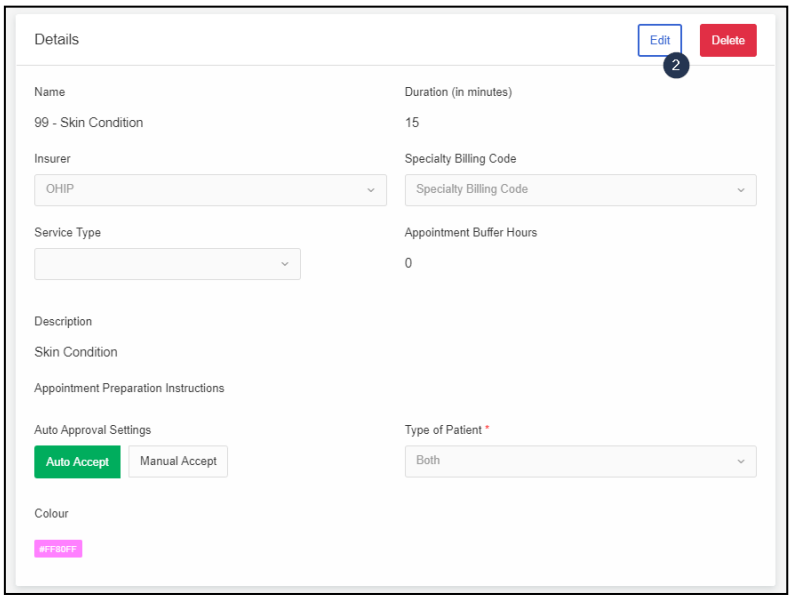
2. Type the name of the **healthcare service**.
3. Select a **service type** that relates to the healthcare service.
4. Type the **duration** of the healthcare service.
5. Select an **insurer** as applicable.
6. Select a **specialty billing code** as applicable.
7. Type a **description** of the healthcare 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.
11. Select one of the options to have it show on the **“**Patient Sign Up**”** form (Online Booking module).
    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. Assign a colour to the template.
13. Click “**Create Healthcare Service**” to save the new healthcare service.

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

Editing a Service Template



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



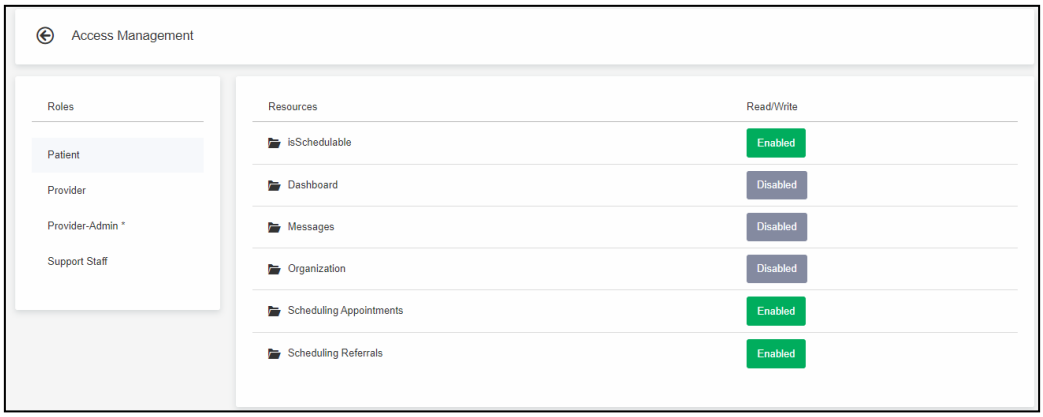
2. Click "**Edit**" and make changes to the healthcare service information.
3. **Save** your changes.

Access Management

View user roles

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

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

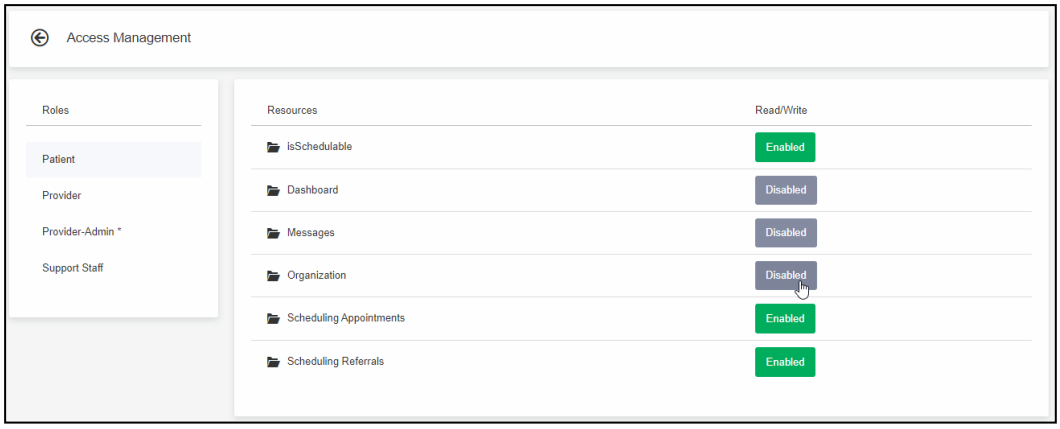


3. See the list of **user roles** and the **permissions** for each **Resource**.

Available Provider or Admin Roles

- Provider
- Provider-Admin
- Support Staff

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.

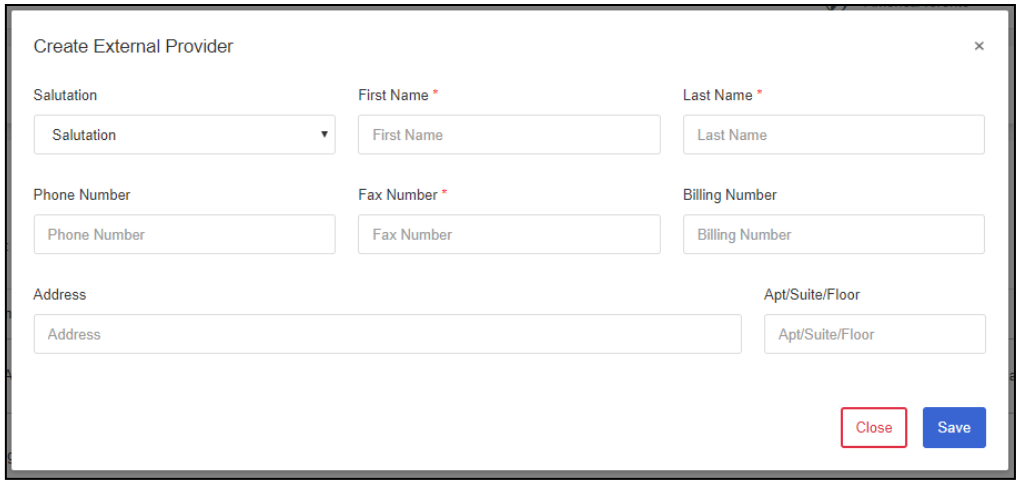
External Providers

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**”.

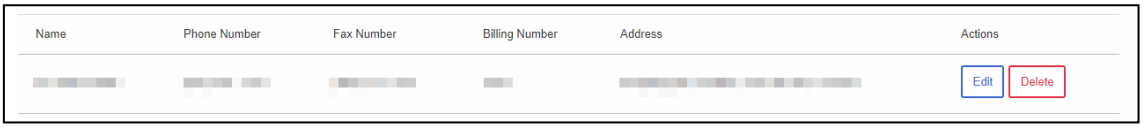
Add a new provider

3. Click “**New**”.

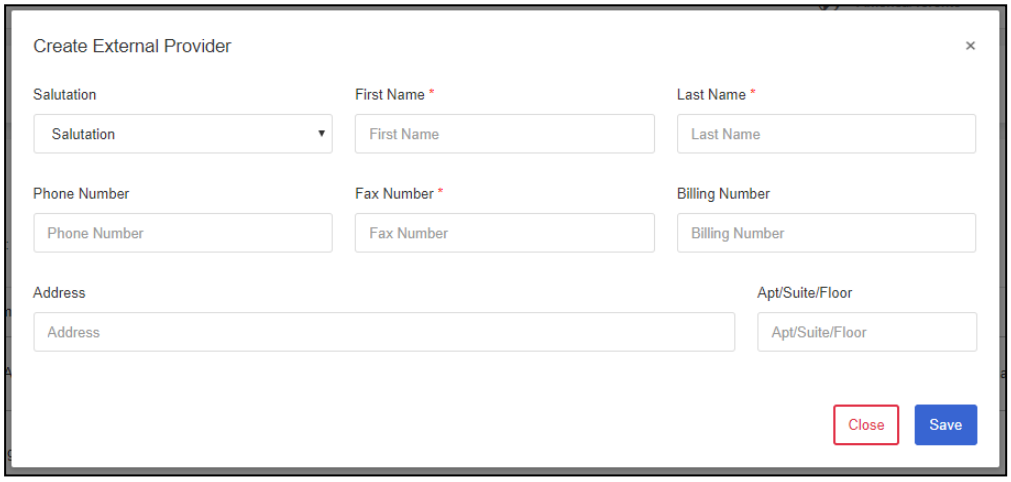


4. Complete all the referral provider’s information.
5. Click “**Save**”.

Edit an existing provider

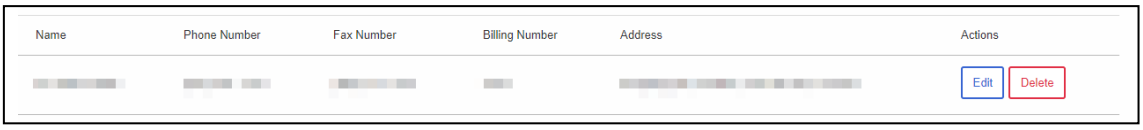


1. Click “**My Organization**”.
2. Click “**External Providers**”.
3. Click “**Edit**”.

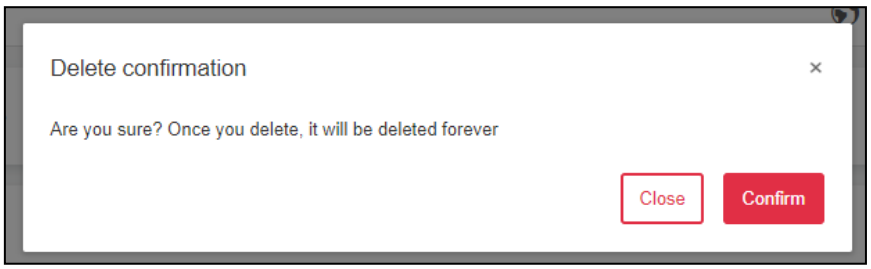


4. Modify provider information.
5. Click "**Save**".

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.

Provider Availability Setup

Provider 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*

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

1. Click "**Calendar**"

2. Click "**View Availability**"

Template Manager Method

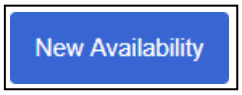
The Template Manager can be used to manage scheduling templates.
To access the list of schedule templates from the manager:

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

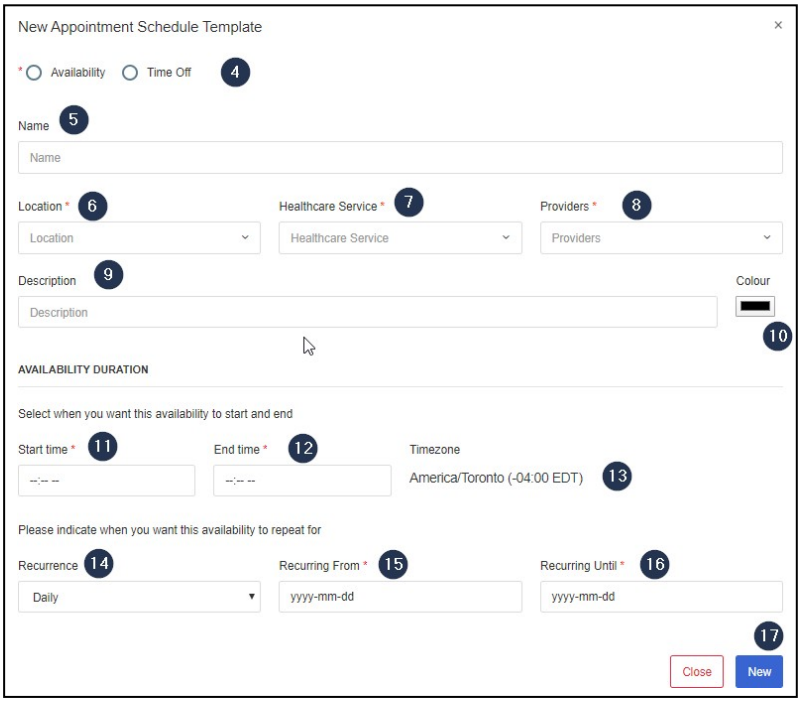
As a provider/admin, a schedule template can be created to indicate provider/counsellor availability and will show for.

Add a new schedule template

Calendar Availability Method



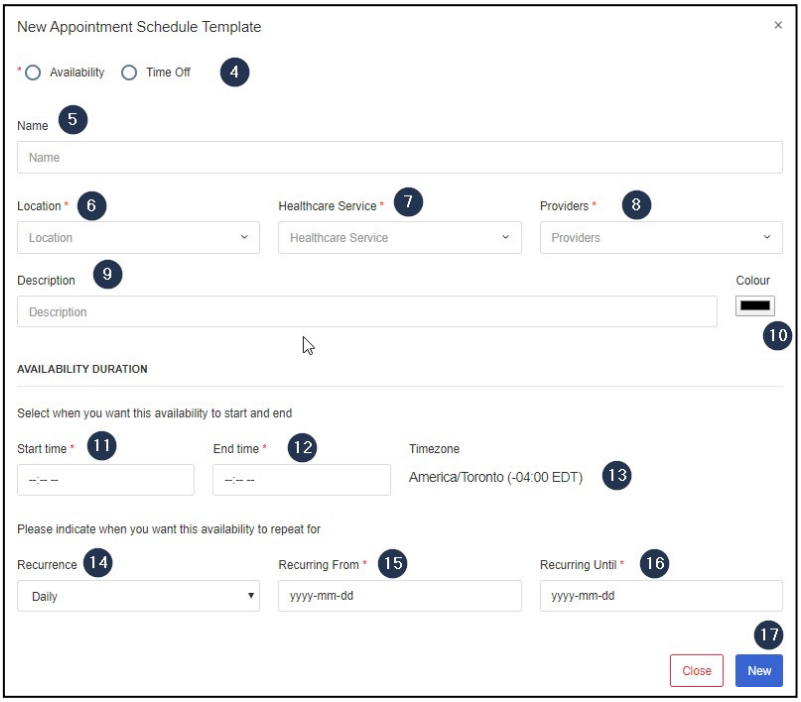
3. Click "**New Availability**".



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:
    a. None
    b. Daily
    c. Weekly
    d. 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**”.



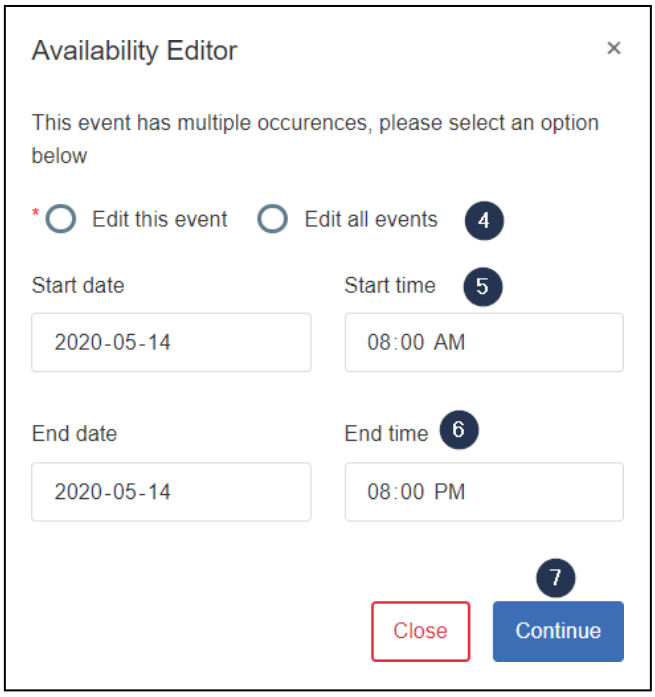
4. Select the **type of schedule template** to create:
    a. **Availability** – Opens slots for provider availability
    b. **Time Off** – Blocks time on the schedule for breaks or time off
5. Type a **Name** for the schedule template.
6. Select a **Location**.
7. Select a **Health Care Service** to 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:
    a. None
    b. Daily
    c. Weekly
    d. 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.

Edit an existing schedule template

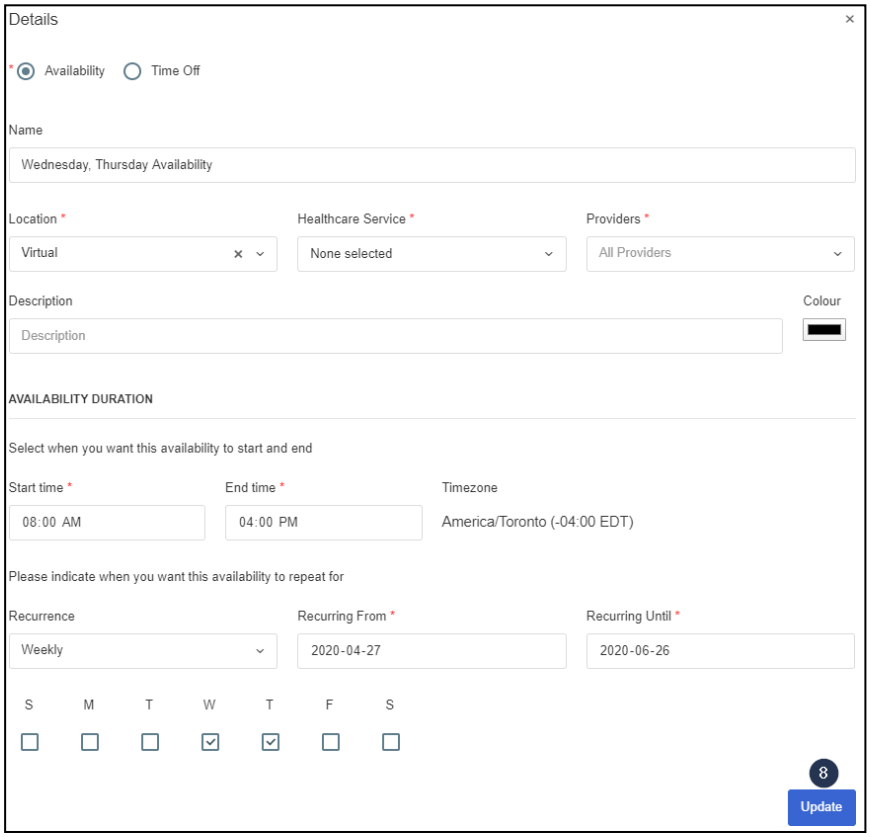
Calendar Availability Method

1. Click "**Calendar**"

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



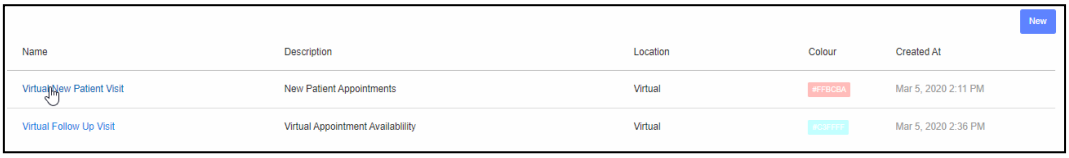
4. Select if you would like to "**Edit this event**" or "**Edit all events**"
5. Modify the "**Start date**" or "**Start time**" (if applicable)
6. Modify the "**End date**" or "**End time**" (if applicable)
7. Click "**Continue"** (If "**Edit all event**" is selected please proceed to step 8)



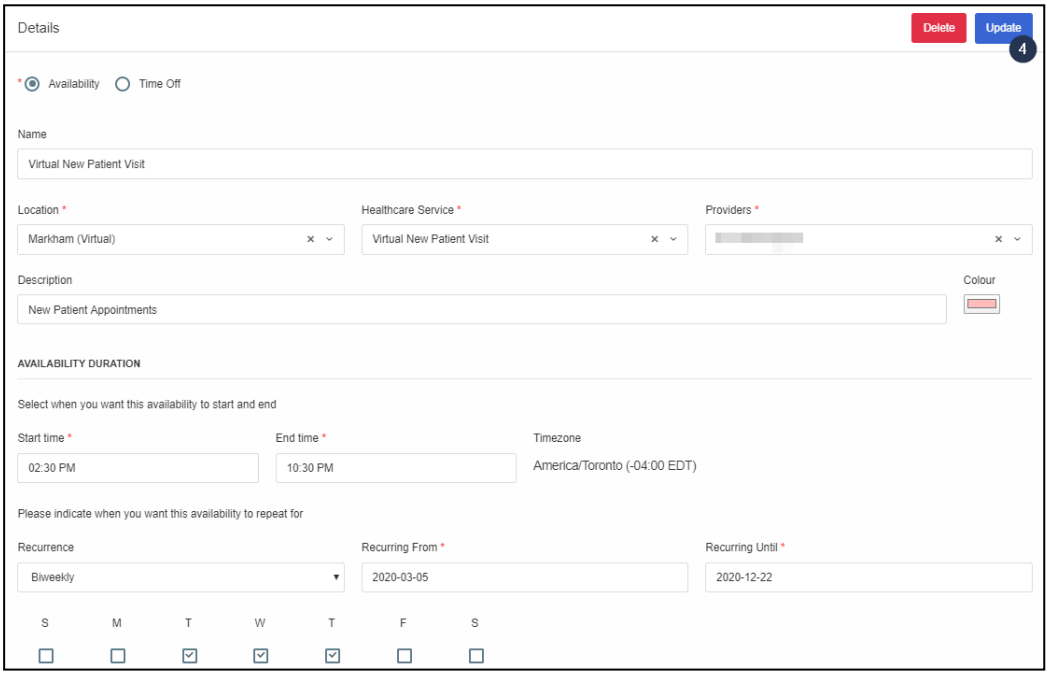
8. Edit the template as needed and then click "**Update**".

Template Manager Method

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



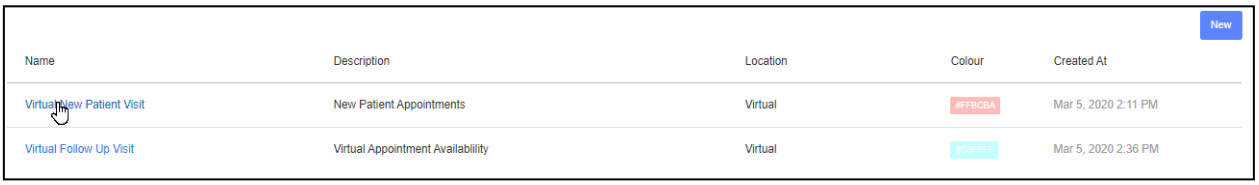
3. Click on a **schedule template name** to edit a template.



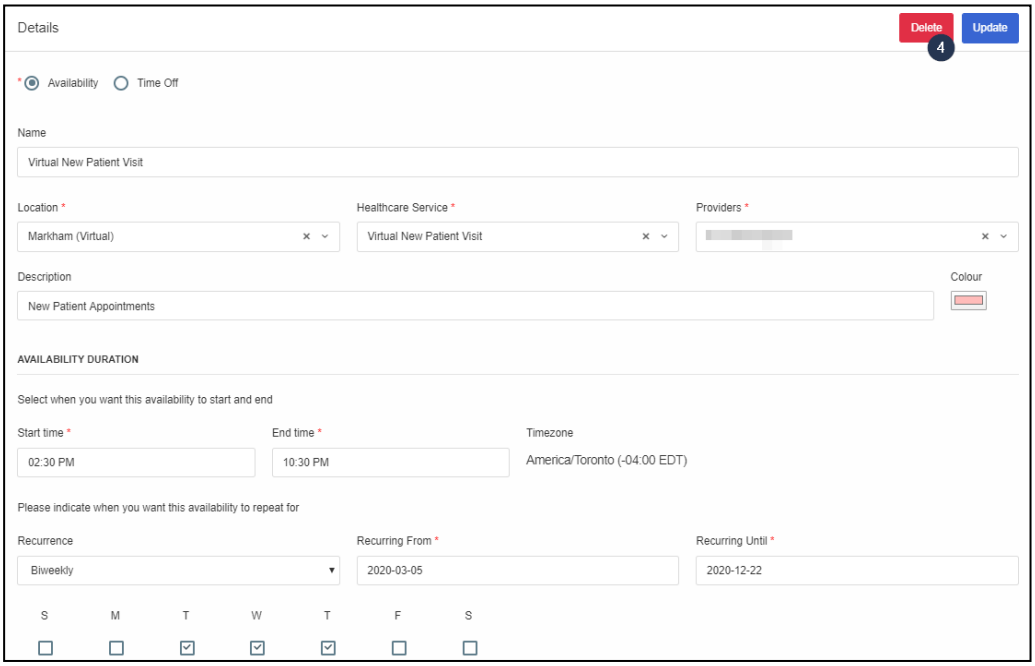
4. Edit the template as needed and then click “**Update”**.

Delete an existing schedule template

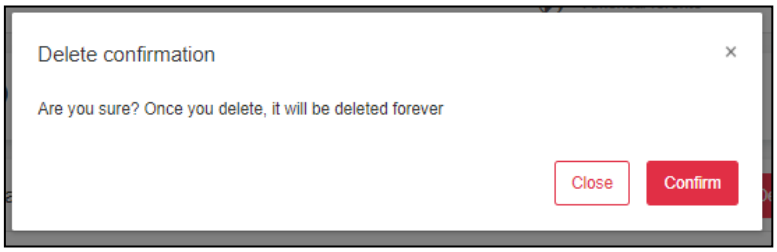
1. Click “**My Organization**”.
2. Click “**Template Manager**”.



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



4. Click “**Delete**”.



5. Click “**Confirm**” to delete the schedule template.

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.

Create a new questionnaire template

1. Click "**Forms**".
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.

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**".

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.

Notification Template Setup

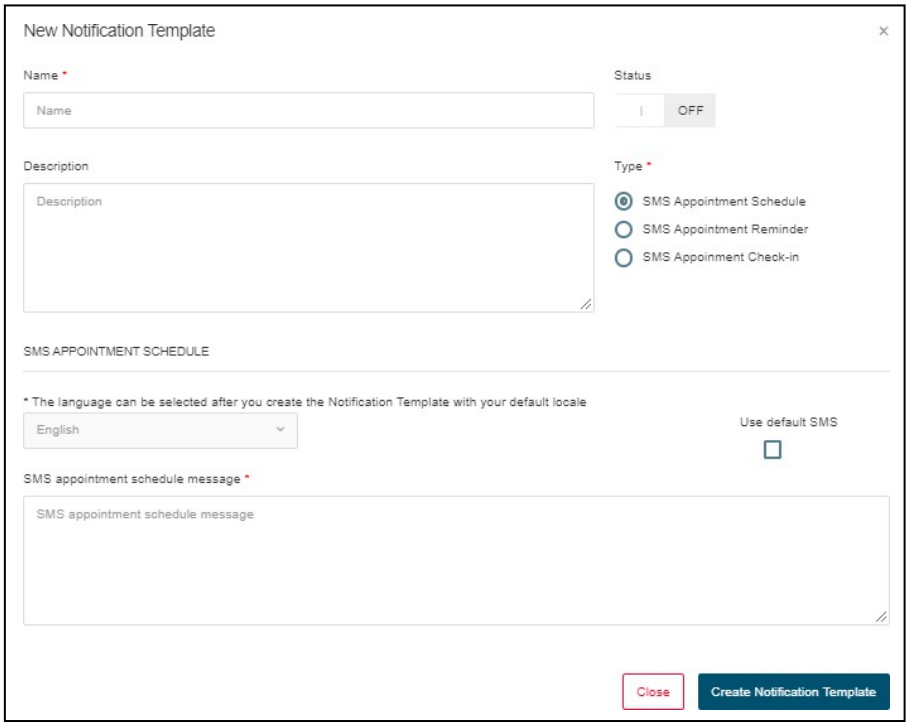
SMS Notifications

Administrators can change the notification text for SMS notifications.

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

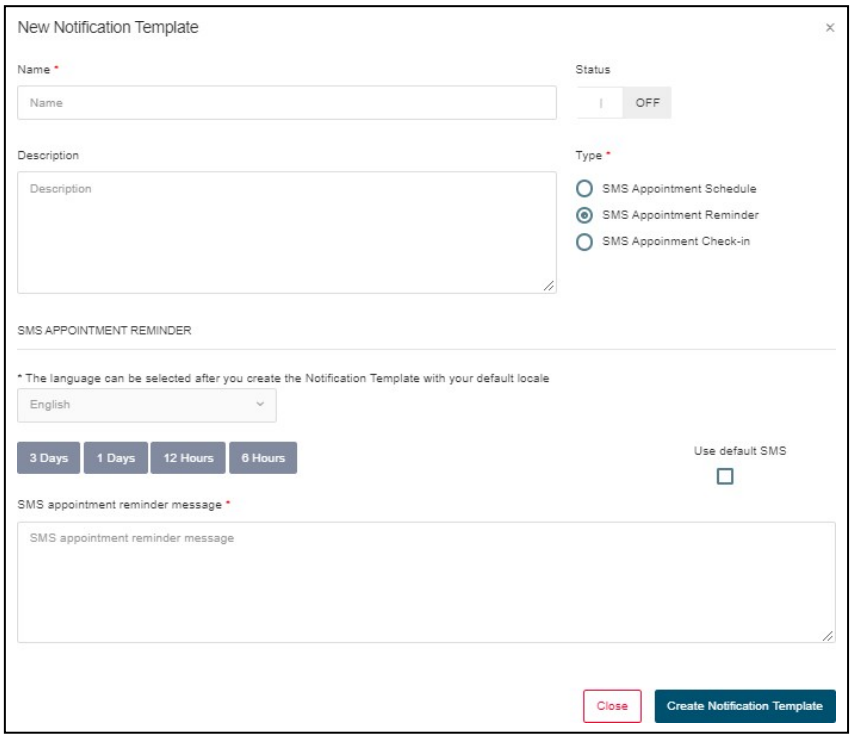
Adding SMS Notifications

SMS Appointment Schedule



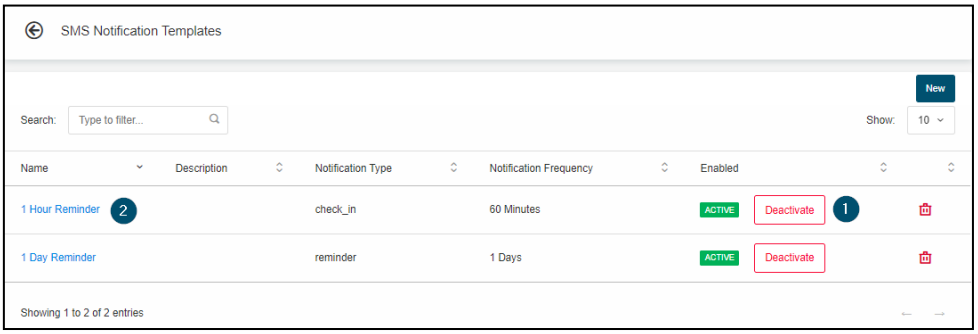
4. Type a **name** for the new template.
5. Change the **status** to "**On**".
6. Type a description of the notification.
7. Select "**SMS Appointment Schedule**".
8. Select "Use default SMS" to use the built-in SMS message for the patient.
9. If "Use default SMS" is not selected, type the SMS message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

SMS Appointment Reminder

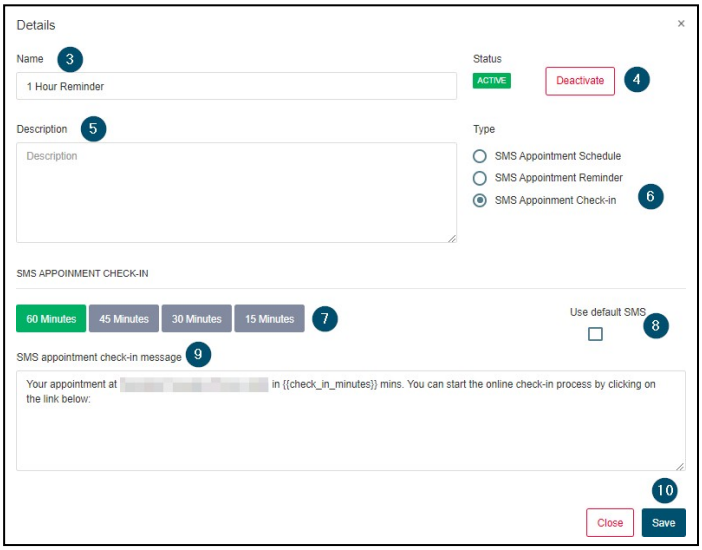


11. Type a **name** for the new template.
12. Change the **status** to "**On**".
13. Type a **description** of the notification.
14. Select "**SMS Appointment Reminder**".
15. Select **the length of time prior the appointment** when the message will be sent.
16. Select "**Use default SMS**" to use the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

Editing SMS Notifications



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



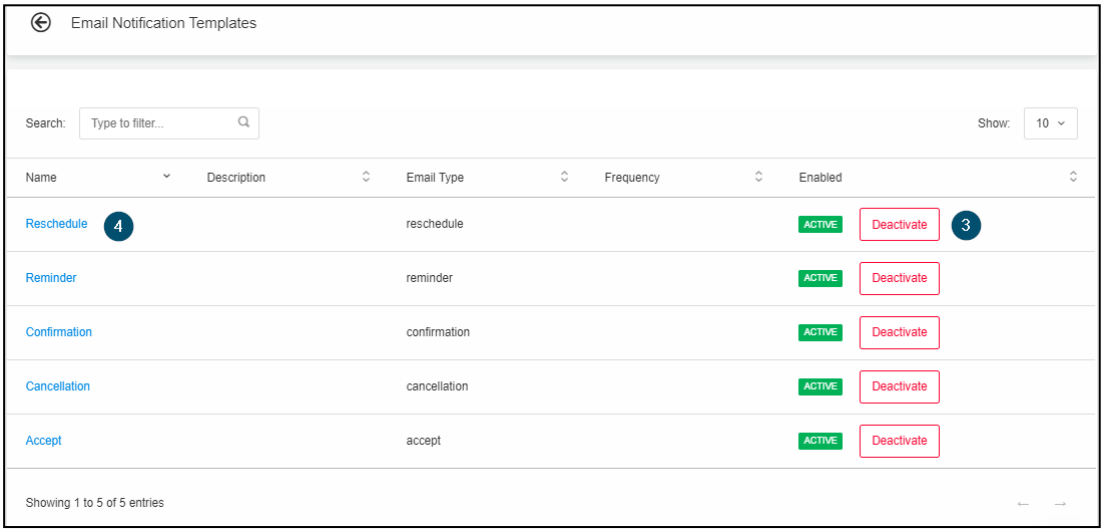
3. **Rename** the template.
4. **Activate or Deactivate** the Email Template Notification.
5. Type in a **description**.
6. Change the **type of SMS notification**.
7. Select **the length of time prior the appointment** when the message will be sent.
8. Select “Use default SMS” to use the built-in SMS 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.

Email Notifications

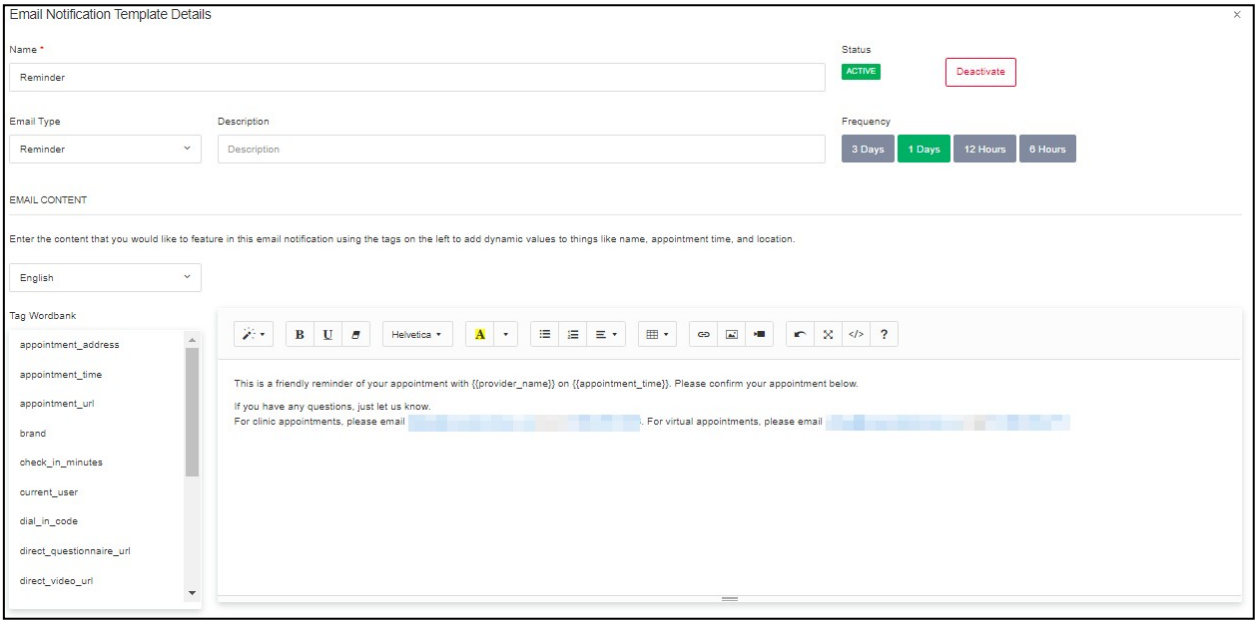
Administrators can change the notification text for the 6 default emails:

- 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.

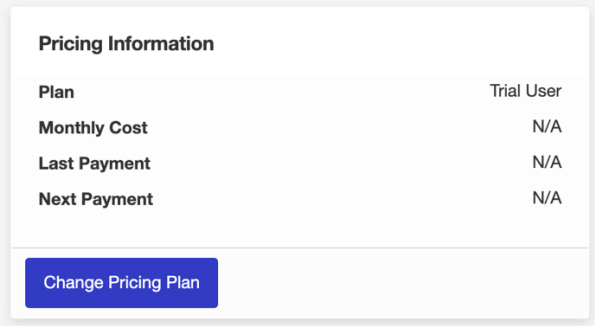
Note: Use the **Tag Wordbank** to fully customize your templates with context-based tags. These tags will populate based on the patient, appointment, provider, and organization.

Manage Subscriptions

Change Pricing Plan

Administrators can view the current plan as well as change the pricing plan under “My organization”

1. Go into **My Organization** and click on “**Manage Subscriptions**”



2. Under Pricing Information Click **Change Pricing Plan**

Update Payment Method

Administrators can change the payment plan under “Manage Subscriptions”

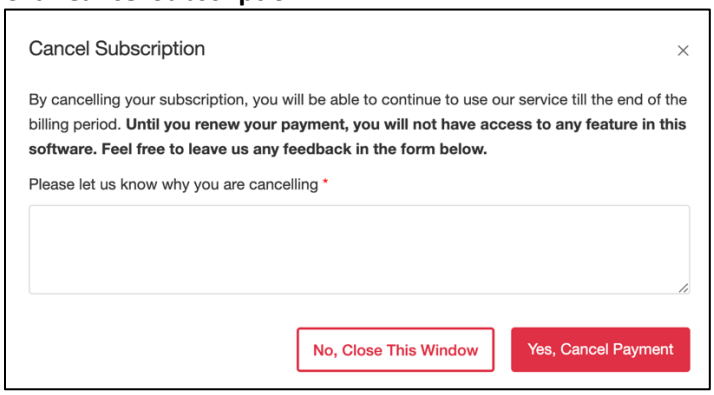
1. Follow **Step 1** from Change Pricing Plan
2. Under Default Card, click **Update Payment**

3. Add your new card details in the available fields.
4. Click **Save** after putting in your new card details.

Cancel Subscription

Administrators can cancel the subscription under “Manage Subscriptions”

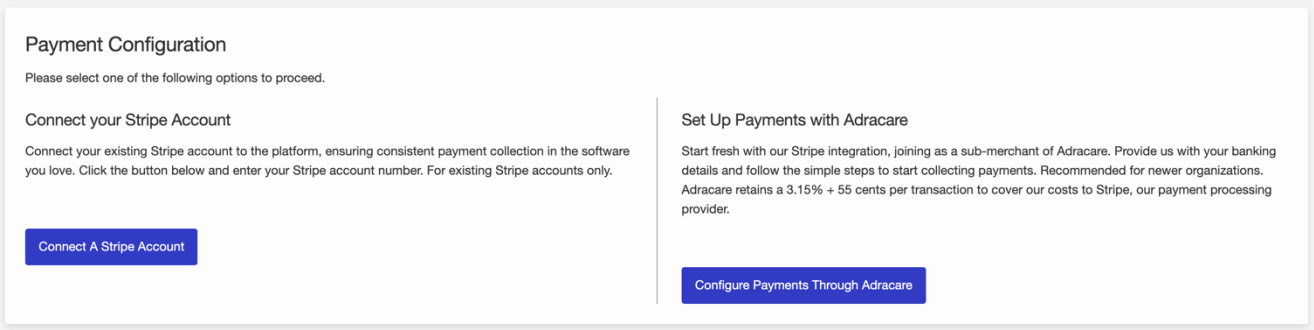
1. Go into **My Organizaton** and click **Manage Subscriptions.**
2. Click **Cancel Subscription.**



3. Fill in the box with the reason for cancelling.
4. Then Click **Yes, Cancel Payment** to finally cancel the subscription.

Payment Configuration

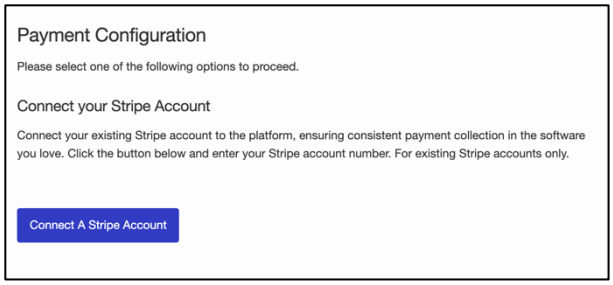
The Payment Processing feature will allow you to request payment from patients for services and collect payment directly in the platform. Admins can access payment configuration through ‘My Organization’. You can either ***Connect you Stripe Account*** or ***Set up payments with Adracare***.



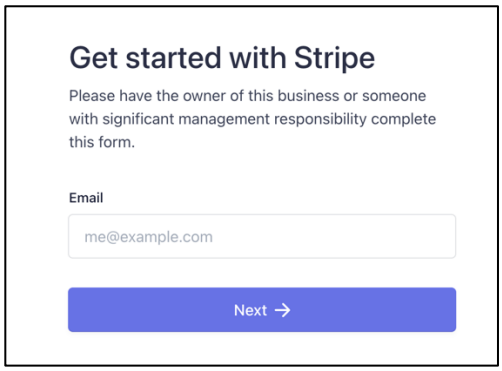
Note: To set up patient payments for your account, you will need to configure "**Payment Configuration**", "**Payment Notifications**" and "**Fee for Healthcare Service Types**".

Connect Your Stripe Account

1. Go into **My Organization** and click on “**Payment Configuration**”



2. Click on 'Connect your Stripe Account'

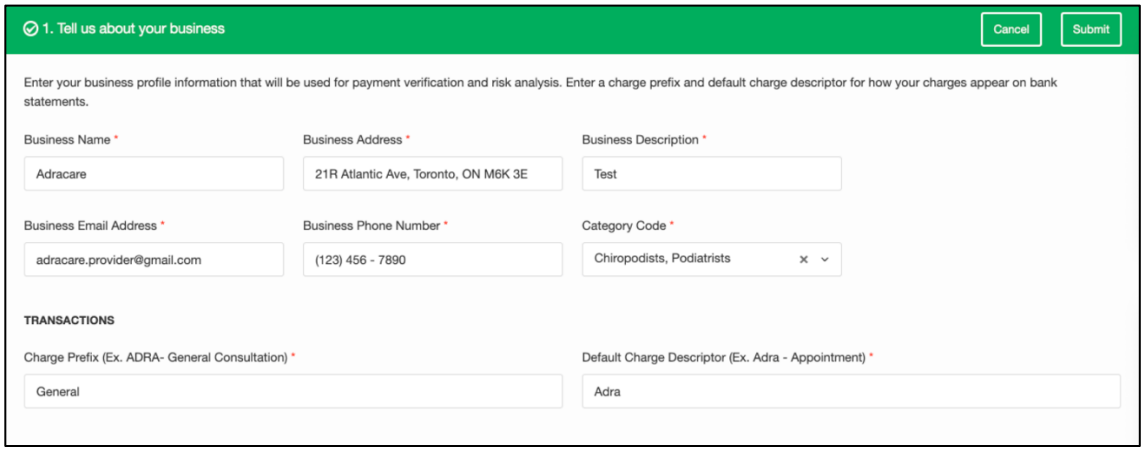


3. A window opens up where you can follow the prompt by putting in your email and click '**Next'**

Set Up Payments with Adracare

1. Go into **My Organization** and click on "**Payment Configuration**"
2. Click '**Set up Payments with Adracare**'
3. In "**Set up Payments with Adracare**", proceed with completing the three sections: *Tell us about your business*, *Enter your banking information for depositing collected patient payments* and *Identity Verification with Stripe*.

   SECTION 1: **Tell us about your business:** This information will be used for payment verification and risk analysis.

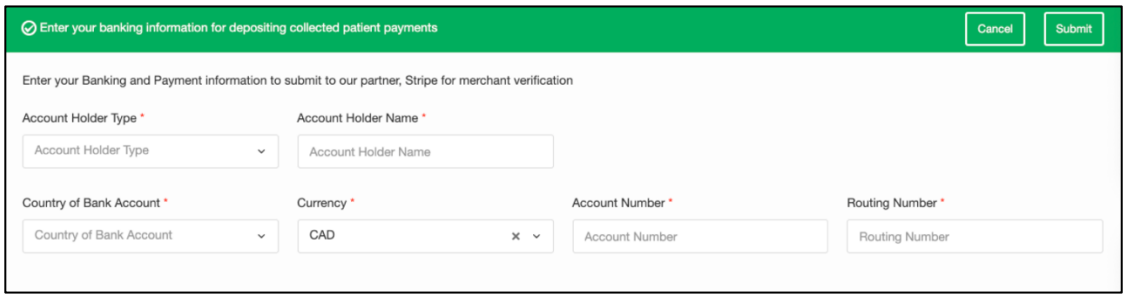


   1. Business Name

2. Business Address: Type in your address and select the appropriate business address from the autofill addresses populated below.
3. Business Description
4. Business Email Address
5. Business Phone Number
6. Category Code: Search for your area of practice and select the most appropriate option from the autofill options (ex. Counselling services)
7. Charge Prefix: This is what will show up on your bank statement when you get paid for your services (ex. ADRA - Consultation)
8. Default Charge Descriptor: Description of the charge that you will see on your bank statement when a transaction occurs

Note: Once you complete the "**Tell us about your business**" section, click on the "**Submit**" button in the top right corner of the section. You will then see a pop up to Review Adracare's Terms and Conditions. To proceed to the next section, you must agree to Adracare's Terms and Conditions. The grey "Tell us about your business" header will turn green once the section has been completed and saved successfully.

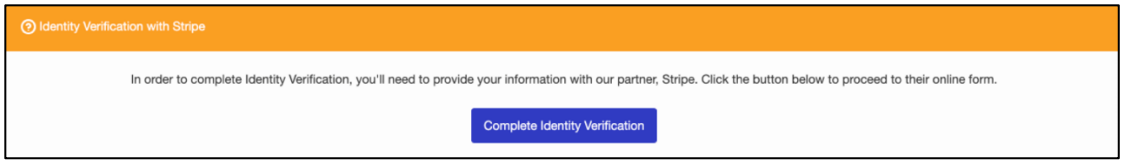
SECTION 2: **Enter your banking information for depositing collected patient payments:** This information will be submitting to our partner, Stripe for merchant verification



1. Account Holder Type: Individual or Company
2. Account Holder Name
3. Country of Bank Account: CA, UK, US, AU
4. Currency: CAD
5. Account Number: This information can be obtained from your banking institution
6. Routing numbers: This information can be obtained from your banking institution. This is also known as the "transit number".
7. Click 'Submit' at the top right corner

NOTE: The grey "Enter your banking information for depositing collected patient payments" header will turn green once the section has been completed and saved successfully.

SECTION 3: **Identity Verification with Stripe:** To complete the payment configuration, you will need to provide your information to our partner, Stripe for identity verification.



1. Click on the "**Complete Identity Verification**" button and you will be navigated to the Stripe website to complete the process.
    - *Once you have completed the Identity Verification on the Stripe website, you will be directed back to the Adracare platform. The grey "Identity Verification with Stripe" header will turn green once the section has been completed successfully.*

NOTE: Once you have completed all three sections successfully, the top right hand corner of the **"Payment Configuration"** section, will show your **"Account Status"** is **"Approved"** and you will now be able to request payment from your patients for your services. Please note that the Stripe verification may take up to 24-48 hours to process.

If you did not complete all three sections successfully, your **"Account Status"** will be **"Pending"**. The sections that were completed unsuccessfully will have an orange header.

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