

Second Opinion Enterprise Tutorial Scheduling Video Calls

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Logging In

To sign into the portal, go to the Second Opinion Enterprise Portal web address using your browser, type in your Username and Password.

The screenshot shows the 'Sign In' page of the Second Opinion Enterprise portal. The page has a blue header with the logo and navigation links. The main content area is white with a blue 'Sign In' button. A green callout box points to the username field, which contains 'R2\KWilson'. A red circle '1' is next to the username field, a red circle '2' is next to the 'Remember me' checkbox, and a red circle '3' is next to the 'Forgot Password?' link. Below the form are links for 'Privacy Policy' and 'Terms Of Services'. The Second Opinion logo is at the bottom.

Sign In

Type in your Username, include the Domain if instructed to do so

If your organization uses Domain Authentication, use Domain\Username

R2\KWilson Remember me Keep me signed in

Forgot Password?

Sign In

Privacy Policy | Terms Of Services

- 1 Type in the Username and Password you were given to log into the portal. Use your regular network login, Domain\Username and your Password, if you are told to do so.
- 2 For security reasons, Remember me and Keep me signed in, may be disabled by your organization.
- 3 Click [Forgot Password?](#) if you have forgotten your Username or Password and are having trouble logging in. Note: This cannot be used to recover Domain accounts.

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Once you have successfully logged in, you will be presented with one of two different screens. If you are regular User you will be presented with your Review Page.

The screenshot shows the 'Review' page of the Second Opinion Enterprise portal. The page has a blue header with the logo and navigation links. The main content area is white with a green header for the 'Site: General Hospital'. Below the header are two user avatars: John Jones (442313) and John Smith (65643). The page also has a sidebar with 'Review Home' and 'Dashboard' tabs.

SECOND OPINION ENTERPRISE

Welcome Katie Wilson! My Account | Sign Out

Home Review Scheduling

Review Home Dashboard

Sites

Root > General Hospital

Site: General Hospital

442313 Jones, John

65643 Smith, John

If you are a Specialist User you will be taken to your Dashboard.

The screenshot shows the 'Dashboard' page of the Second Opinion Enterprise portal. The page has a blue header with the logo and navigation links. The main content area is white with a green header for the 'Worklist'. Below the header are three tabs: 'Public Referrals', 'Referrals I Have Created', and 'Referrals Assigned To Me'. The 'Video Meetings' tab is selected, and the page displays 'There are no video meetings to display.' The page also has a sidebar with 'Review Home' and 'Dashboard' tabs.

SECOND OPINION ENTERPRISE

Welcome Matt Jones! My Account | Sign Out

Home Review Scheduling

Review Home Dashboard

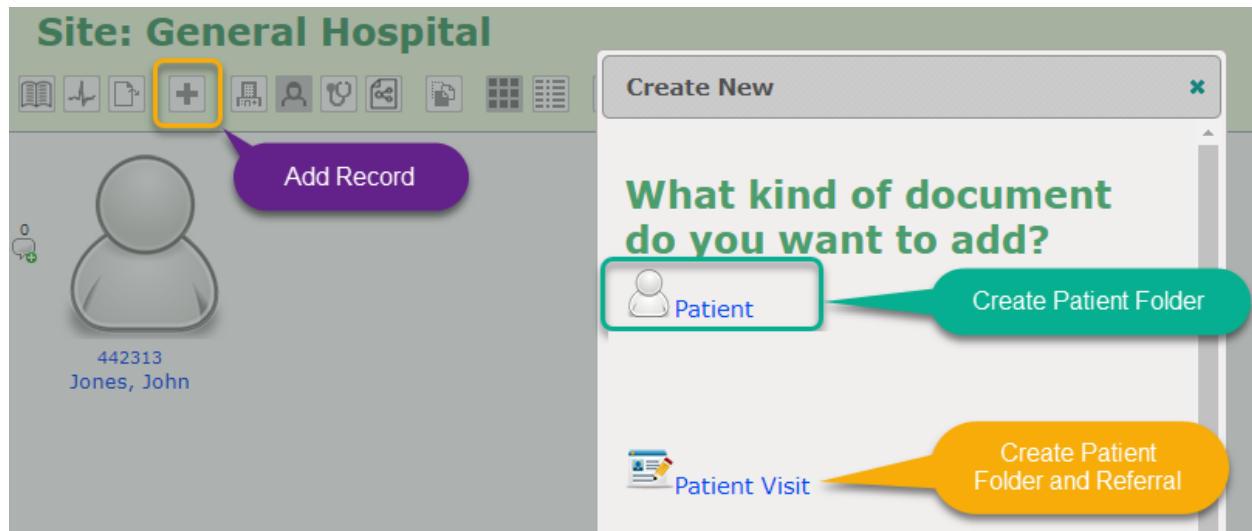
Worklist History Shares

Public Referrals Referrals I Have Created Referrals Assigned To Me Video Meetings

There are no video meetings to display.

Create Patient Folder

There are a couple of different ways to create a new Patient folder, **Clicking** the **Add Record** icon displays a list of documents that can be added. Adding a Patient Demographics form is the most efficient way to create a new Patient folder. The Patient Visit form can also be used to create a Patient folder but it also creates a Referral form that is not necessarily useful if you are not using Referrals when scheduling virtual appointments.



When filling in the Patient Demographics form to create a new folder, all of the fields in the Registration section are mandatory except for the Email address. But, the Email field must be filled in prior to scheduling an appointment to support notifications to the Patient. Additional Patient information like Phone numbers can be filled in during this creation process, this is not possible when using the Patient Visit form. To fill in additional Patient information, **Click** on the **Additional Patient Information** section and fill in the desired information. When done **Click** Save **Changes**.

Note: If your use case of the Portal requires direct Patient access to their account, **Click** on the **Patient User Account** section to define their Username and Password.

New Patient Registration

Review Home | Dashboard | **New Patient** ✕

Save Changes | Cancel

PATIENT

Registration

Primary Patient Site*
General Hospital ▾

Patient ID* Same required fields that are included on the Patient Visit form

First Name*

Last Name*

Date of Birth*
mm/dd/yyyy

Sex/Gender*

Email

Additional Patient Information

Patient User Account

Note: The **Email** field supports multiple email addresses and all addresses will be sent notifications. Separate the various email addresses with a <;>. Example:
Patient@SomeDomain.com; CareGiver@SomeDomain.com

Additional Patient Information

Review Home | Dashboard | **New Patient** ✕

Save Changes | Cancel

PATIENT

Registration

Additional Patient Information

Secondary Patient ID

Guardian Name

Guardian Relationship

Examiner

Marital Status
Single ▾

Type	Phone Number	Phone Carrier	SMS Domain	
Mobile ▾		Alltell ▾	@message.alltel.com	Test SMS Remove

Add another number

Add address

Patient User Account

Insurance

Vitals

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Multiple phone numbers and addresses can be entered for each Patient folder, **Click** the **Add number** or **Add address** buttons to enter values. **Click** the **Add additional numbers** or **Add additional addresses** buttons to enter additional values.

Note: Sending **Text Message** notifications is also supported. **Click** **Add number** or **Add another number**, **Select Mobile** as **Type**, fill in the phone number then **Choose** the **Phone Carrier**. **Click** the **Test SMS** button to validate the entry, a test SMS message will be sent.

Review Patient Information

Home Review Scheduling

Review Home Dashboard Patient: Jones, John (442313) ✕

Edit

PATIENT

Created By: [Katie Wilson](#)

Patient ID: 442313

Secondary Patient ID:

Enterprise Patient ID: 1463

Name: John Jones

Date of birth: 02/03/1980

Sex/Gender: Male

Guardian Name:

Guardian Relationship:

Examiner:

Site: General Hospital

Email: @gmail.com

Marital Status: Single

Phone Numbers: 310-555-1212 (Mobile)

Addresses:

Username:

Note: If any entry needs to be changed, **Click** the **Edit** button to update the information.

SECOND OPINION ENTERPRISE Welcome Katie Wilson! My Account | Sign Out

Home Review Scheduling

Review Home Dashboard

Sites

Root > General Hospital > John Jones (442313)

Patient: John Jones (442313)

06/18/2020 21:02 Joe Seffe

06/18/2020 21:03 Ins Card Front

06/18/2020 21:03 Ins Card Back

06/18/2020 21:03 License

Note: Once a Patient folder is open, additional forms can be added or files can be uploaded to support your specific use case. **Click** the **Add Record** icon to see the list of documents that can be added or to access the **Upload File utility**.

New Appointments - Scheduler Panel

To create a new video chat or virtual meeting using the Portal, the meeting has to be scheduled. There are a few different ways to start the Add Appointment editor. It can be launched while working with Patient folders in the Review Home page and in various locations within the Scheduling module.

To create a new meeting while in the **Review Home** page, open the desired Patient and **Click** the **Scheduler Panel** arrow at the bottom of the page, a scheduler panel will slide up.

The **Scheduler Panel** allows you to make new appointments for any available specialist. **Select** the **Date**, find the **Specialist**, then **Click** on the desired **Time** for the appointment. If the panel is activated while in a Patient folder, the Patient is pre-selected in the appointment editor.

Note: The **Scheduler Panel** can also be used without first opening a Patient folder. In this case, you will have to manually select the appropriate Patient if applicable.

Appointment Editor

Add Appointment

An email will be sent to: the specialist, the patient, and specified attendees.

Specialist:*
Matt Jones

Patient:
Jones, John (442313)

Appointment Title
Follow Appointment

Appointment Notification Description
Don't Be Late

Appointment Date:*
07/09/2020

Appointment Time:*
14:00 - 14:15 PDT

Video Meeting:*
 None
 Zoom Meeting
 Other

Attendees by group:
Predefined Groups
Katies Group (General Hospital)

Attendees by email:

Send Notifications to Myself

Submit Appointment

When the **Add Appointment** editor launches, it will pre-fill in all of the information that it knows based on where it was launched from, **Specialist**, **Patient**, **Referral**, as well as the **Appointment Date** and **Time**. Fill in the **Appointment Title** and **Appointment Notification Description** you want to show up in the notification that is sent out to all attendees of the meeting. If the meeting is for a group, select the **Predefined Group(s)** or **Create/Edit** a new group. External participants of the meeting like family members or caregivers can be added in the **Attendees by email** section. When finished, **Click Submit Appointment**.

Appointment Scheduling by Day Patient Appointment List by Month

today < > 07/09/2020

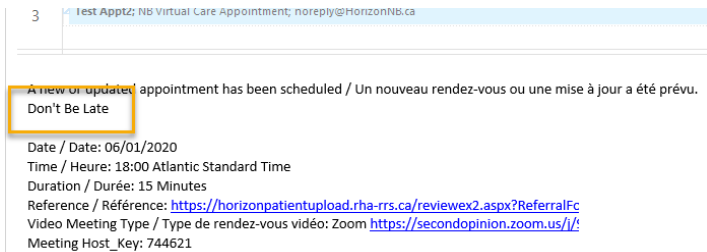
Specialists of Site	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm
Matt Jones				Appointment	Appointment	Appointment		Appointment	Appointment	Appointment	Appointment						
Susan Martinez																	

■ Appointment ■ Appointment For Current Patient ■ Appointment For Current Referral ■ Specialists Availability □ No Availability

Note: The **Appointment Title** will not be used in the notification sent to the patient but, all of the information entered in the **Appointment Notification Description** will be. The appointment description is where one would type in special instructions to give to the Patient and all attendees associated with the appointment.

Note: To invite additional attendees (outside from the Clinician and Patient), enter the additional attendees' emails under the **Attendees by email** section noted above. If they are Users of the Site, their emails will already appear there.

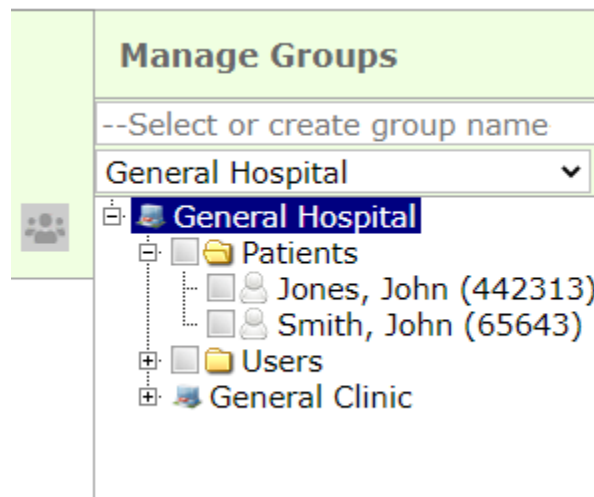
Sample Notification



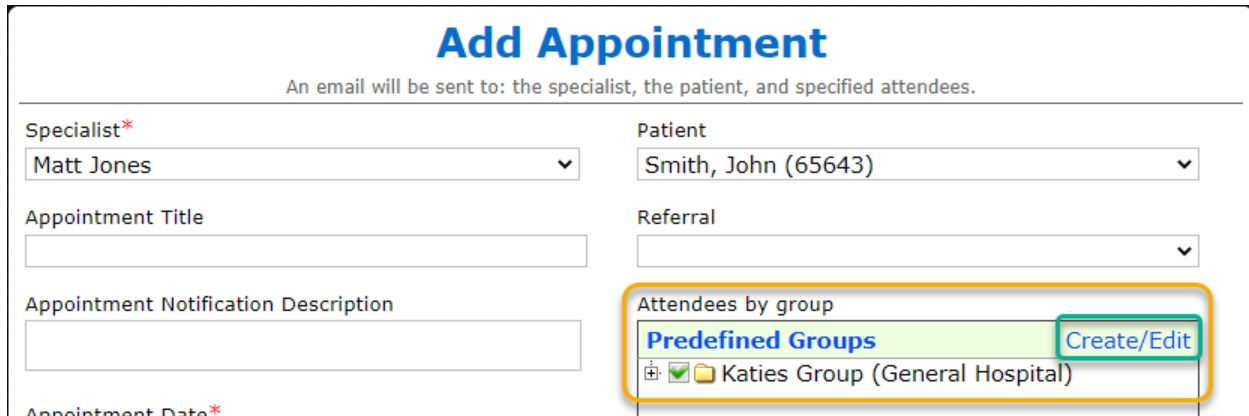
Working with Groups

When there is a need to schedule a group of people for a meeting, Patients, Users or both, a Group can be created. Creating a Group simplifies the process when creating a meeting and ensures no one is accidentally left out of future meetings. Groups can be created ahead of time by **Clicking** the **Group** icon on the **Review Home** page.

From the Review Home page **Click** the **Group** icon to **Manage Groups**.



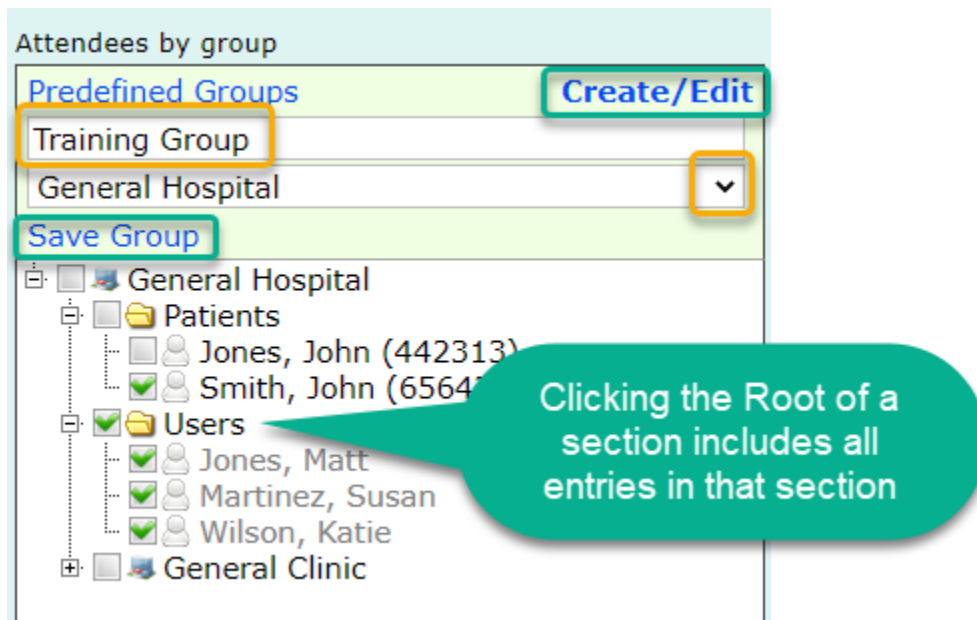
Groups can also be **Edited**, **Deleted** and New Groups **Created**, within the **Add Appointment** editor.



If the Group for the meeting has already been created, **Click** the **Predefined Group(s)** or **Click Create/Edit** to manage groups.

Create New Group

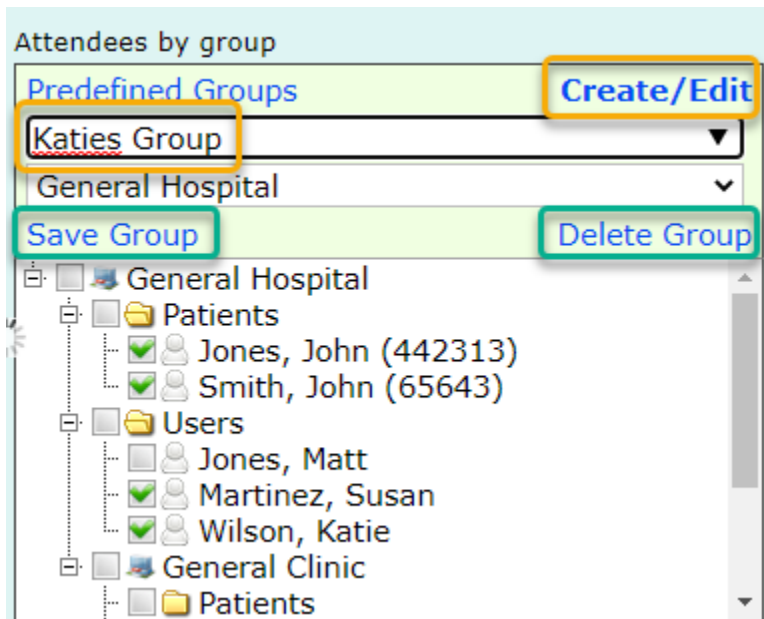
To create a new Group, **type in** the **Group Name**, the associated **Site**, choose the members of the Group and **Click Save Group**.



Note: If a User is contained in more than one Site, choose the User once, there is no need to select all of them.

Edit / Delete Existing Group

To edit a Group, **select** the **Site** and the **Group** to be edited, when complete, **Click Save Group**.
To delete a Group, **select** the **Site** and the **Group** to be deleted, **Click Delete Group**.



For More Info or Technical Support Give Us a Call

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