Second Opinion Enterprise Tutorial Scheduling Video Calls

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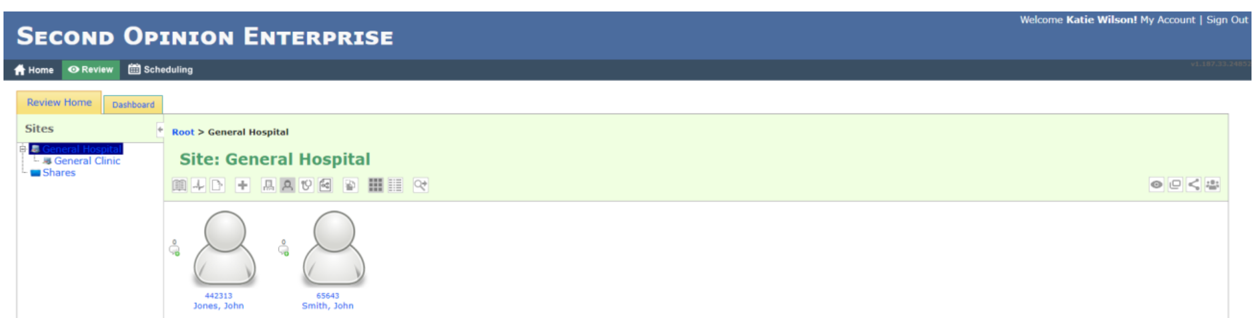
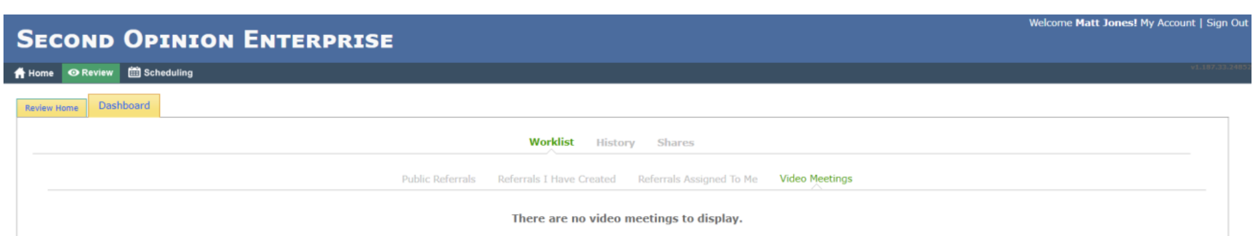
Logging In

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

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.

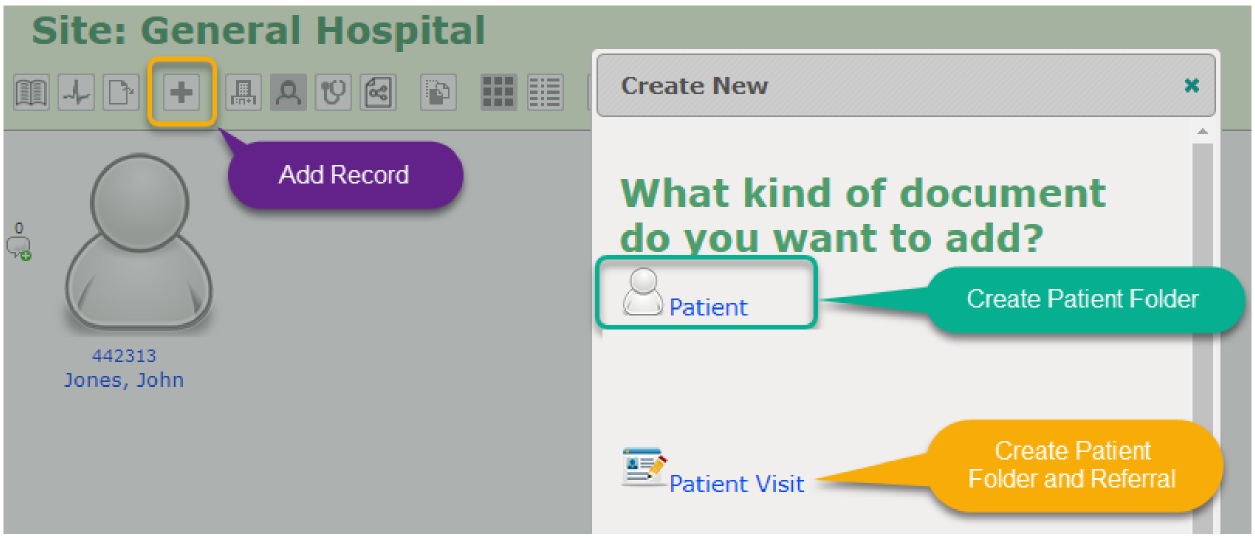


If you are a Specialist User you will be taken to your Dashboard.



Create Patient Folder

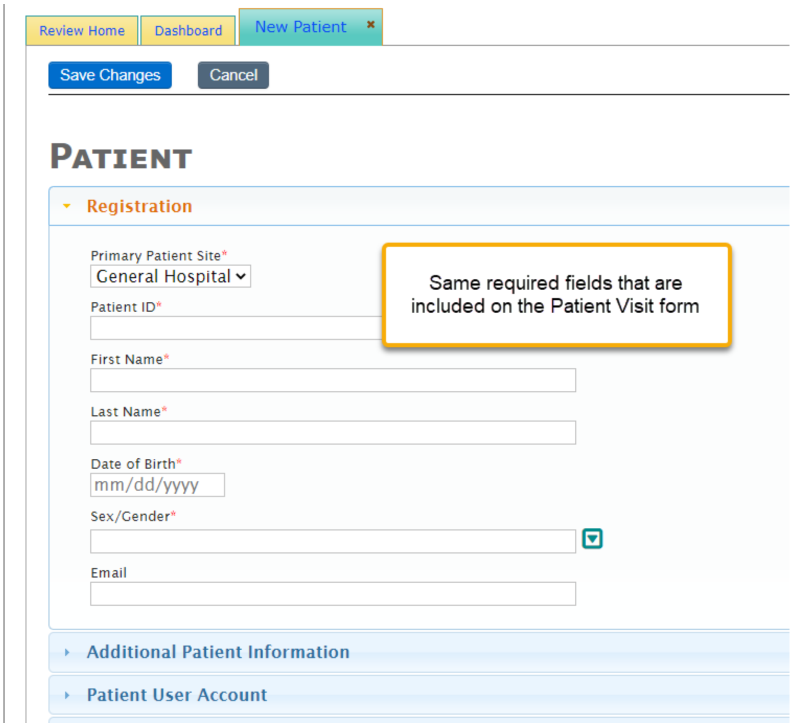
There are a couple of different ways to create a new Patient folder, **Clicking** the **Add Record** icon displays a list of documents that can be added. Adding a Patient Demographics form is the most efficient way to create a new Patient folder. The Patient Visit form can also be used to create a Patient 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**.

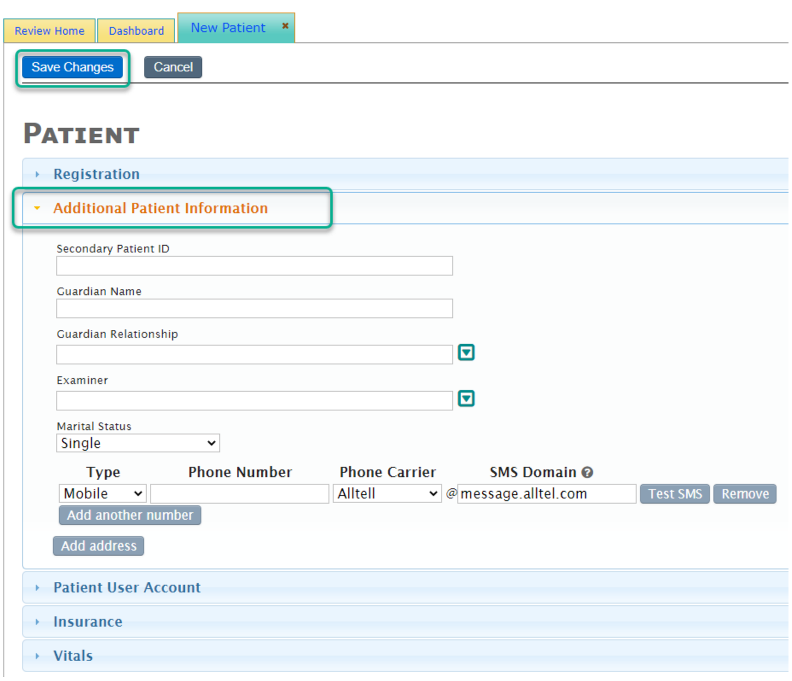
Note: If your use case of the Portal requires direct Patient access to their account, **Click** on the **Patient User Account** section to define their Username and Password.

New Patient Registration



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

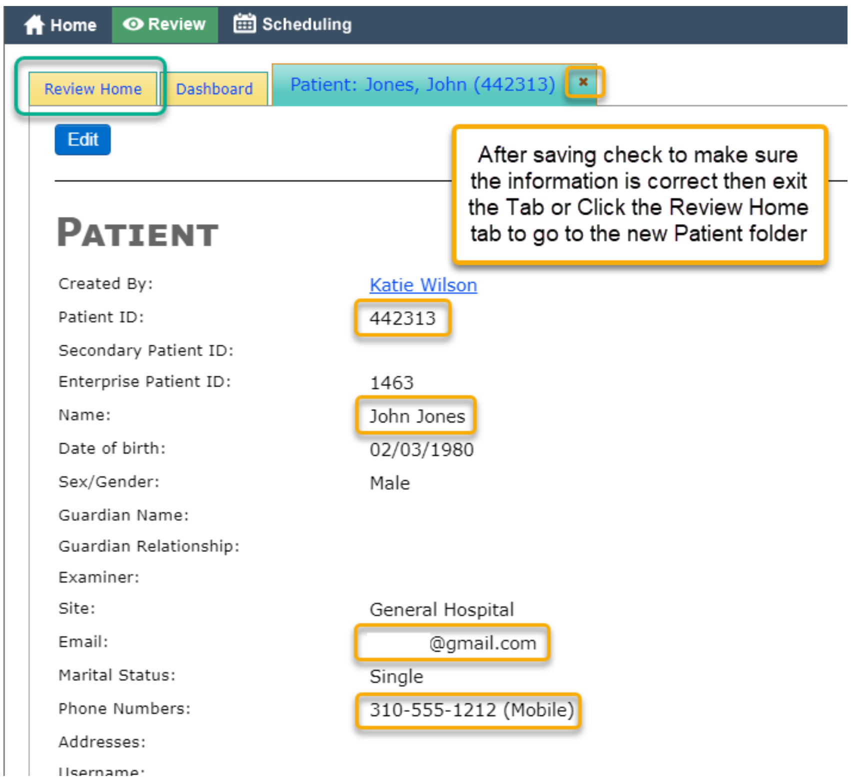
Additional Patient Information



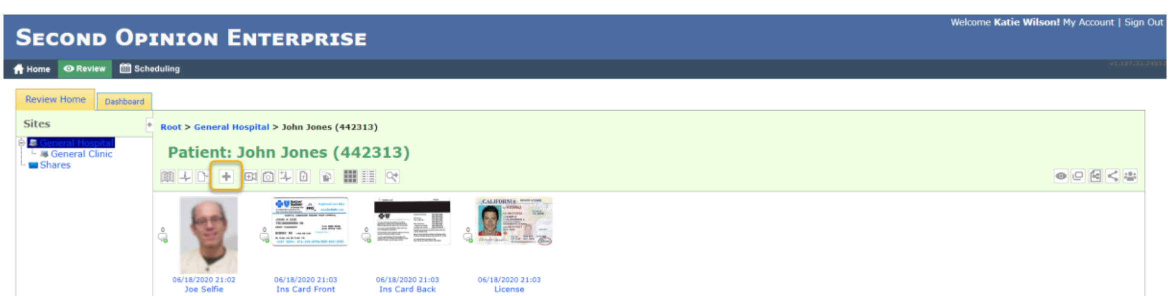
Multiple phone numbers and addresses can be entered for each Patient folder, **Click** the **Add number** or **Add address** buttons to enter values. **Click** the **Add additional numbers** or **Add additional addresses** buttons to enter additional values.

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



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

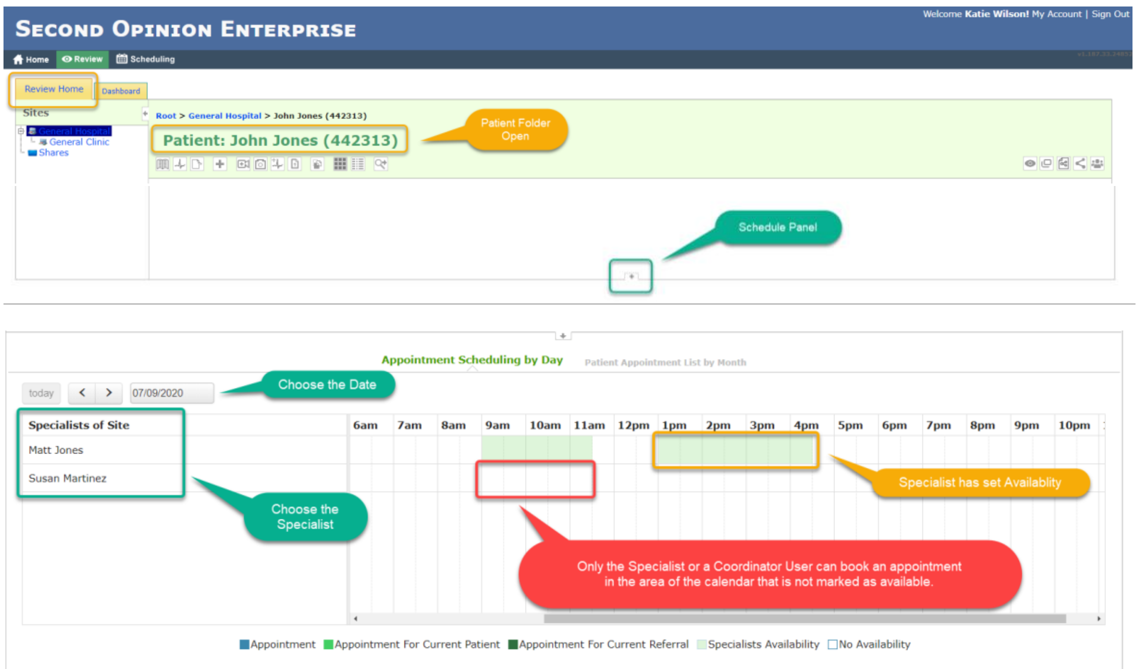


Note: Once a Patient folder is open, additional forms can be added or files can be uploaded to support your specific use case. **Click** the **Add Record** icon to see the list of documents that can be added or to access the **Upload File utility**.

New Appointments - Schedular 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.

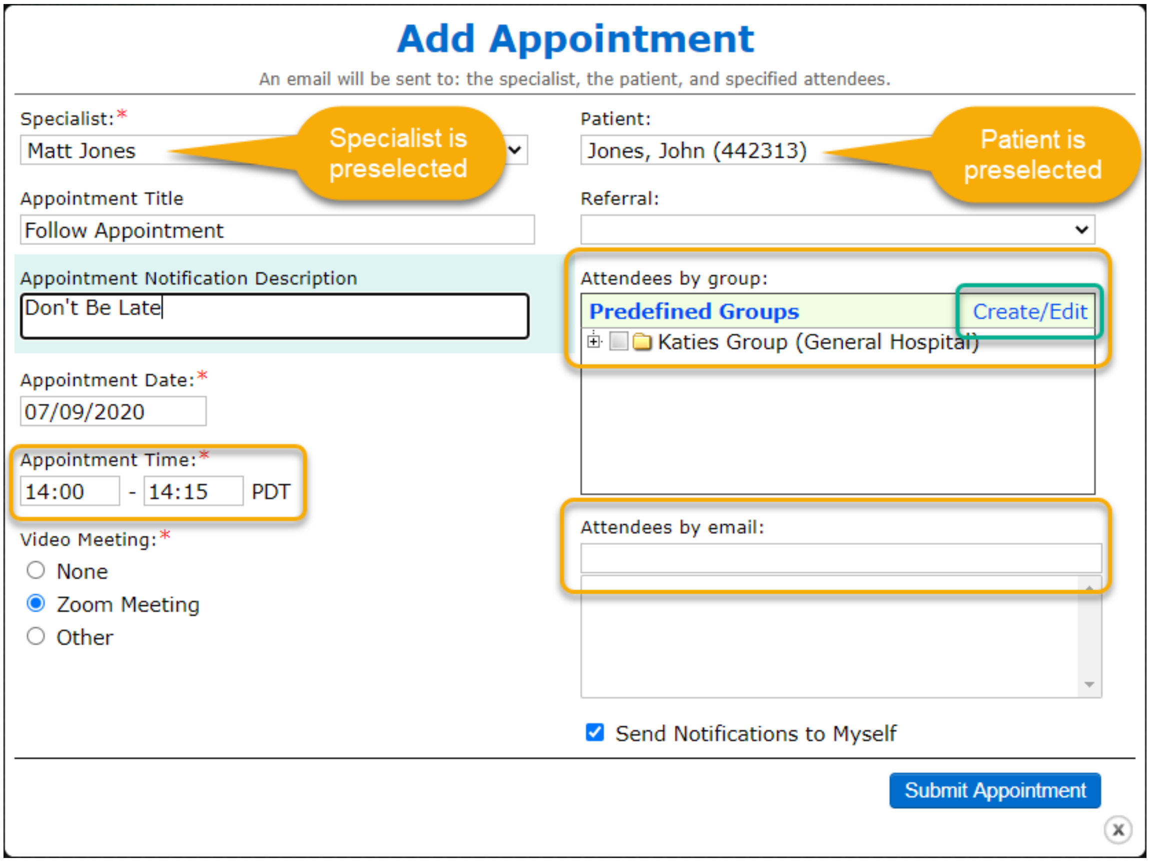
To create a new meeting while in the **Review Home** page, open the desired Patient and **Click** the **Schedular Panel** arrow at the at the bottom of the page, a schedular panel will slide up.



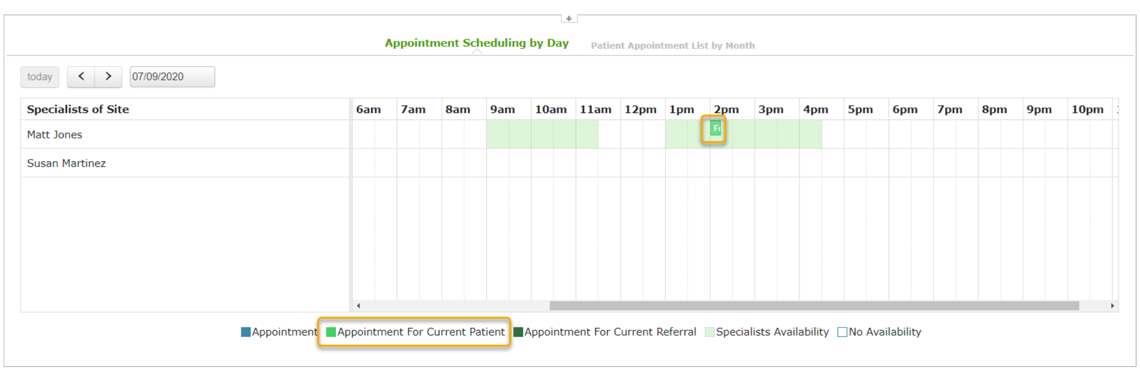
The **Schedular Panel** allows you to make new appointments for any available specialist. **Select** the **Date**, find the **Specialist**, then **Click** on the desired **Time** for the appointment. If the panel is activated while in a Patient folder, the Patient is pre-selected in the appointment editor.

Note: The **Schedular 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



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**.



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.

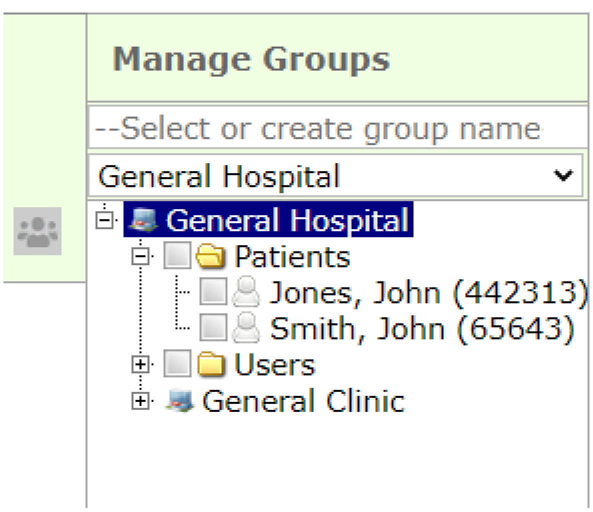
Note: To invite additional attendees (outside from the Clinician and Patient), enter the additional attendees' emails under the **Attendees by email** section noted above. If they are Users of the Site, their emails will already appear there.

Sample Notification

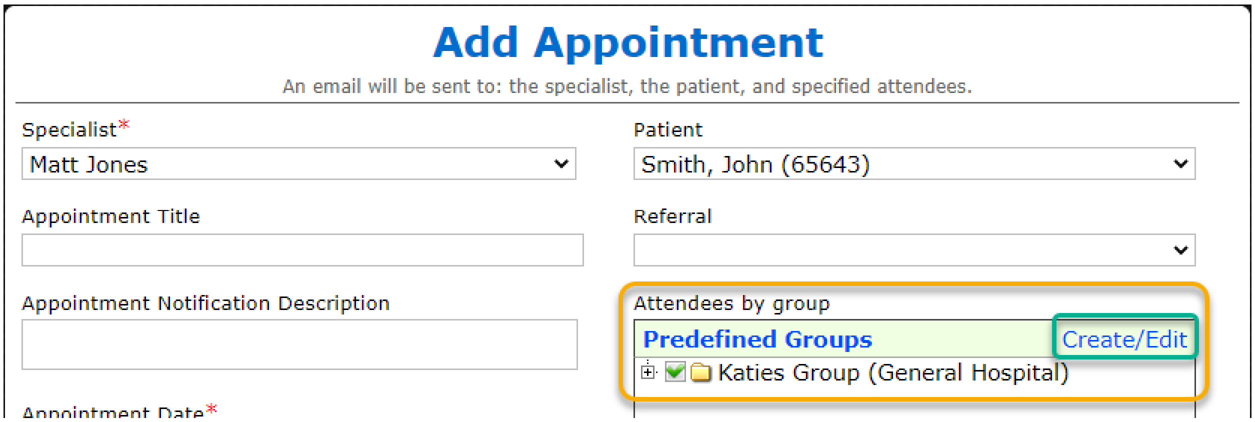
Working with Groups

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**.



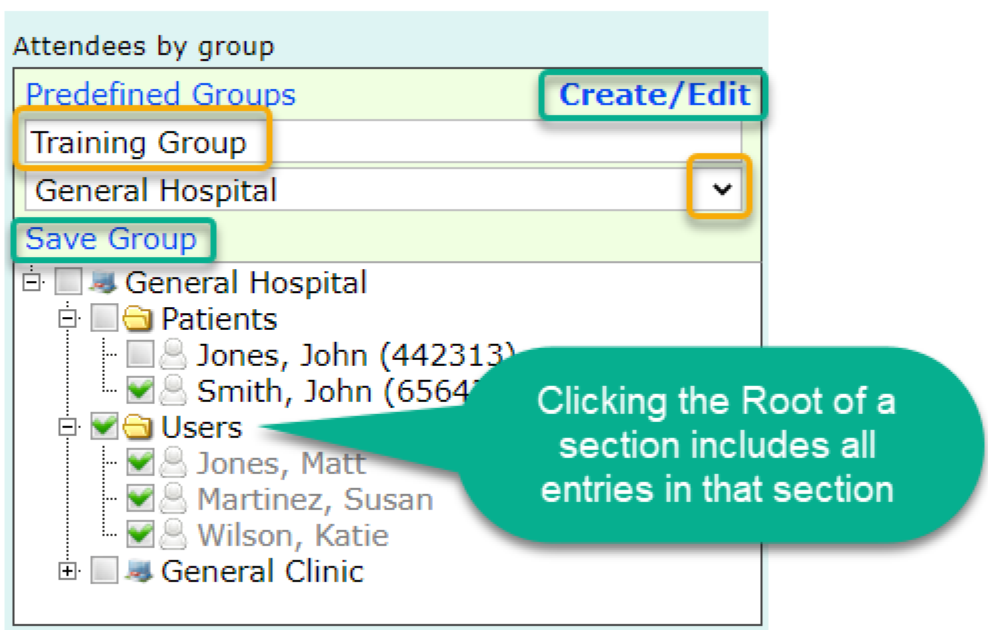
Groups can also be **Edited**, **Deleted** and New Groups **Created**, within the **Add Appointment** editor.



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

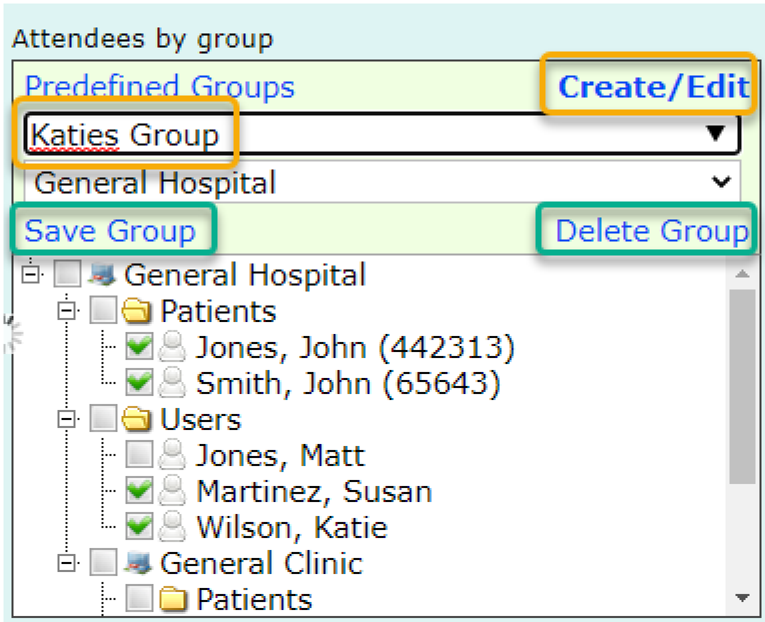
To create a new Group, **type in** the **Group Name**, the associated **Site**, choose the members of the Group and **Click** **Save Group.**



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**.



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