



Second Opinion Enterprise Sharing and Exporting

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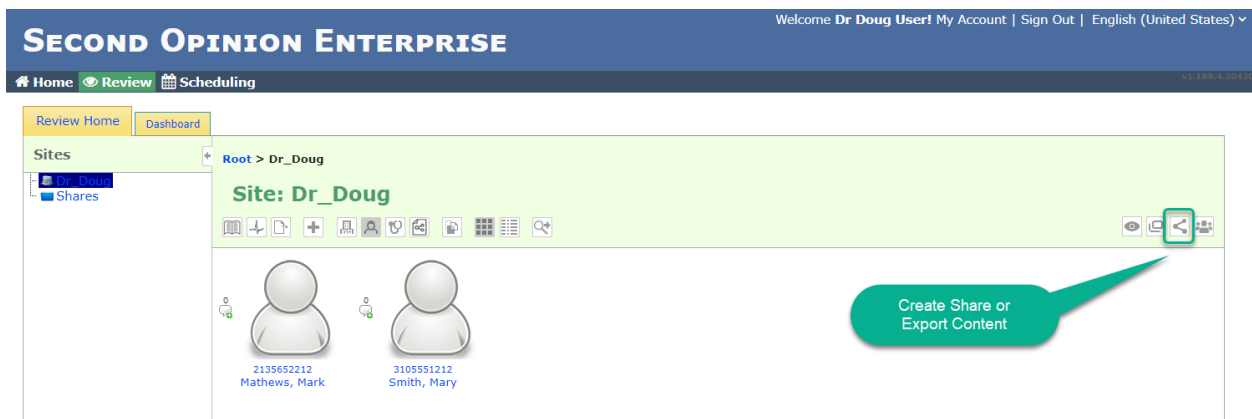
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Sharing Content

Users logging into the Enterprise Portal are associated with Sites and can see the Patients associated with these Sites. Enterprise Sharing was created to allow the sharing of Patient content with Users of the Portal that do not have direct access to this content. This includes external public User accounts that are not associated with any Site on the Portal.

Launch Sharing Tool

Once successfully logged into the Portal, navigate to the content to be shared. If the **Dashboard** is displayed, **click** on the **Review Home** tab, then **click** the **Start Sharing** icon.



Once the sharing tool is activated, check boxes appear in the top left corner of each item displayed. Click on all of the items to be shared. Selected items appear on the right side of the screen in the **Create Share** section.



Entire Folders can be shared or individual Documents, there is no restriction on what can be shared. The selected items can be from different Folders as well as from different Sites.

SECOND OPINION ENTERPRISE Welcome **Dr Doug User!** My Account | Sign Out | English (United States) v

Home Review Scheduling

Review Home Dashboard

Sites Root > Dr_Doug > Mark Mathews (2135652212)

Patient: Mark Mathews (2135652212)

03/30/2020 18:00 Mark
03/30/2020 18:00 Ins Card Front
03/30/2020 18:00 Ins Card Back
03/30/2020 18:00 LicenseCAM2
03/30/2020 18:10 Program Goals

Create Share
Create Share Export

Dr_Doug
Mark Mathews (2135652212)
Mark (03/30/2020 18:00)
LicenseCAM2 (03/30/2020 18:00)
Program Goals (03/30/2020 18:10)

Individual Content from a Patient Folder can be Selected

Multiple Items from Different Patients from Various Sites can be Selected

Selected Items

When finished selecting items, **click Create Share.**

SECOND OPINION ENTERPRISE Welcome **Dr Doug User!** My Account | Sign Out | English (United States) v

Home Review Scheduling

Review Home Dashboard

Sites Root > Dr_Doug > Mark Mathews (2135652212)

Patient: Mark Mathews (2135652212)

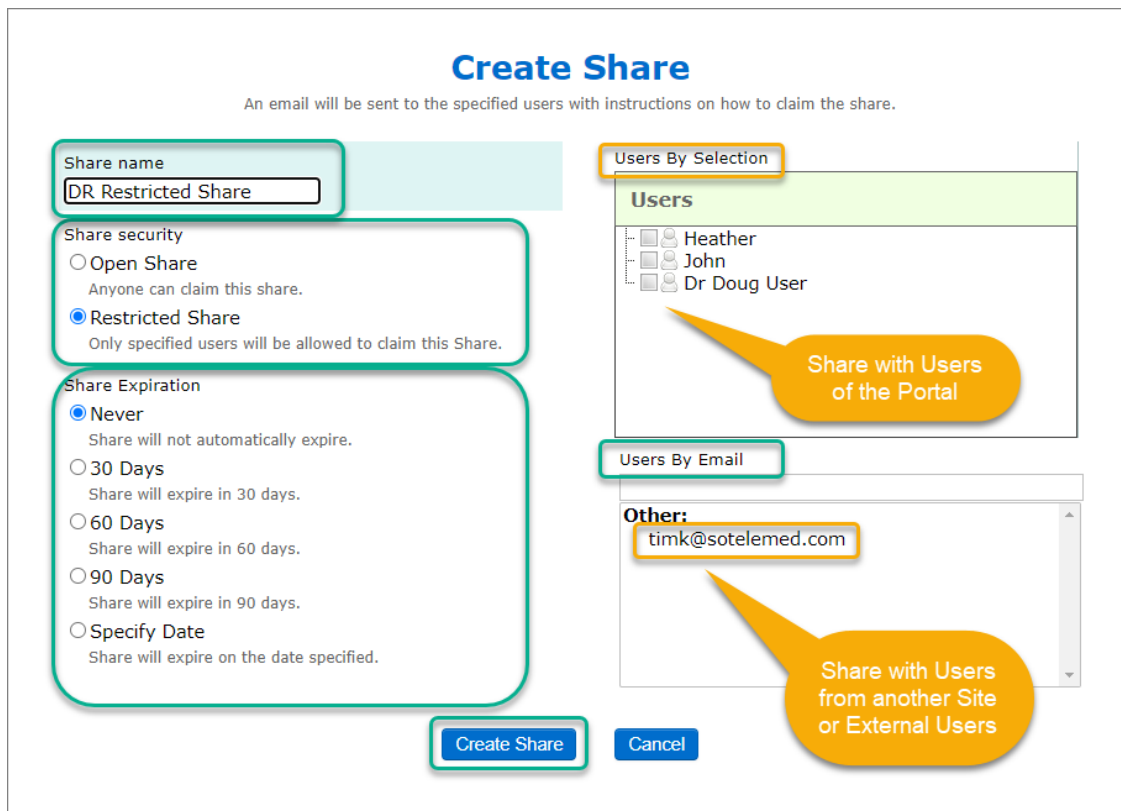
03/30/2020 18:00 Mark
03/30/2020 18:00 Ins Card Front
03/30/2020 18:00 Ins Card Back
03/30/2020 18:00 LicenseCAM2
03/30/2020 18:10 Program Goals

Create Share
Create Share Export

Dr_Doug
Mark Mathews (2135652212)
Mark (03/30/2020 18:00)
LicenseCAM2 (03/30/2020 18:00)
Program Goals (03/30/2020 18:10)

Create Share Editor

The Create Share Editor manages the creation of the Share. Is it an **Open Share**, anyone that clicks the share link can claim it or is it a **Restricted Share**, it is available to a select group of users. It also manages how long the share will be active. The Share can be sent to **Users** of the Portal or **Users by Email**. **Users by Email** allows for the sharing of content to Users who do not have direct access to the content contained in the Share, this can include external public Users that do not have a typical portal account.



Create Share

An email will be sent to the specified users with instructions on how to claim the share.

Share name
DR Restricted Share

Share security
 Open Share
Anyone can claim this share.
 Restricted Share
Only specified users will be allowed to claim this Share.

Share Expiration
 Never
Share will not automatically expire.
 30 Days
Share will expire in 30 days.
 60 Days
Share will expire in 60 days.
 90 Days
Share will expire in 90 days.
 Specify Date
Share will expire on the date specified.

Users By Selection

Users

- Heather
- John
- Dr Doug User

Share with Users of the Portal

Users By Email

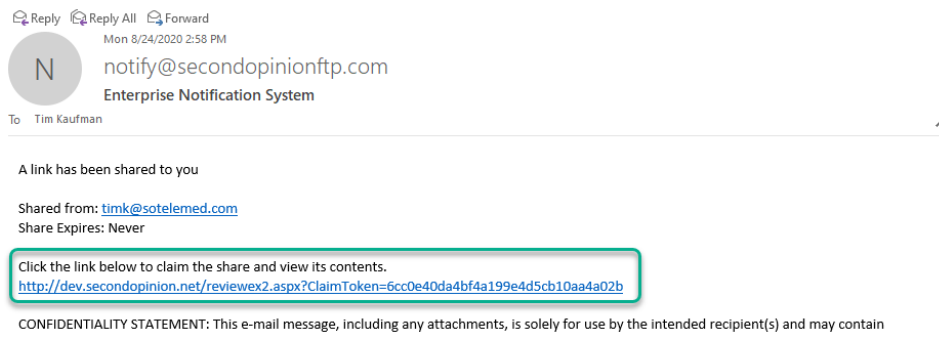
Other:

timk@sotelemed.com

Share with Users from another Site or External Users

Create Share Cancel

When the share is created, a link to the share is defined and sent to all selected users.

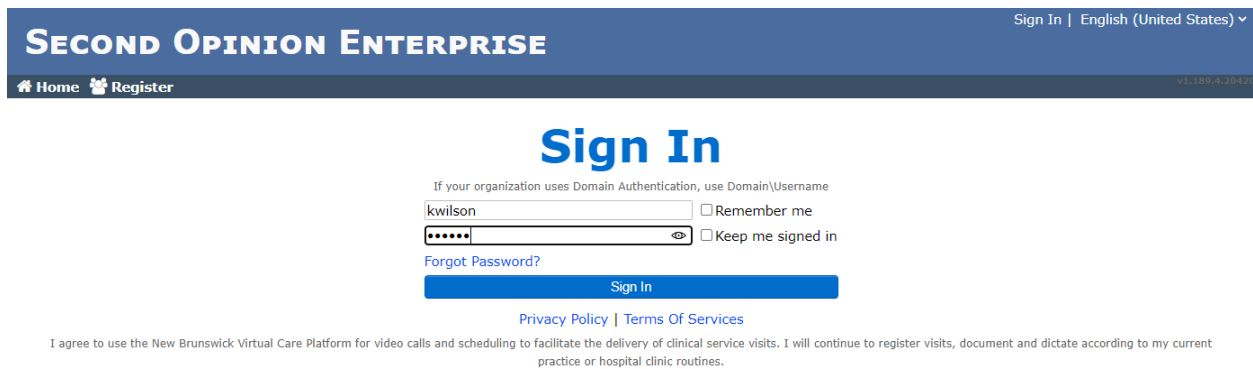




Accessing / Claiming Shares

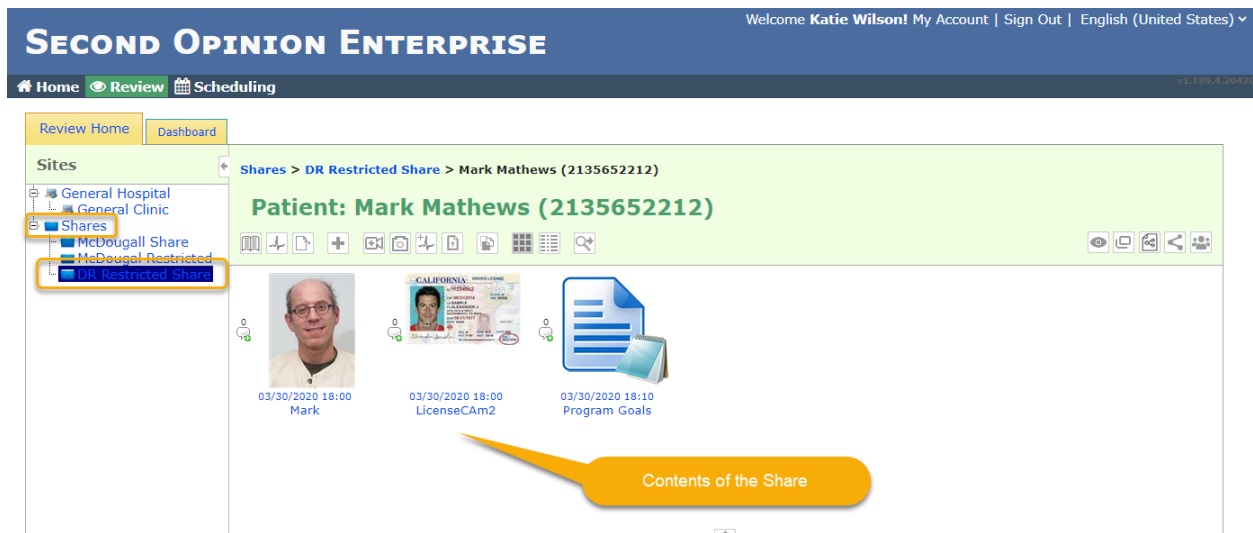
If you received a notification that a Share has been assigned to you, clicking the link contained in the notification will launch the Portal login screen.

Note: You must have a User account to access a Share. If you do not have one, **click Register** to create an external public User account. See **Create External Public User Account** below for more information.



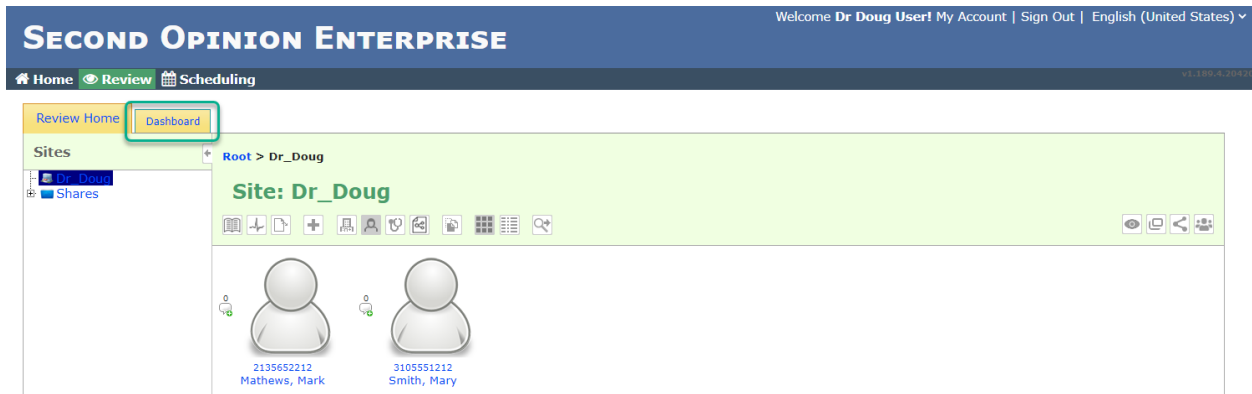
Once successfully logged in, the Share will be claimed and will be visible in the **Shares** site.

Note: **Open Shares** must be claimed to show up in your User account, **Restricted Shares** are claimed automatically when logged into the Portal.



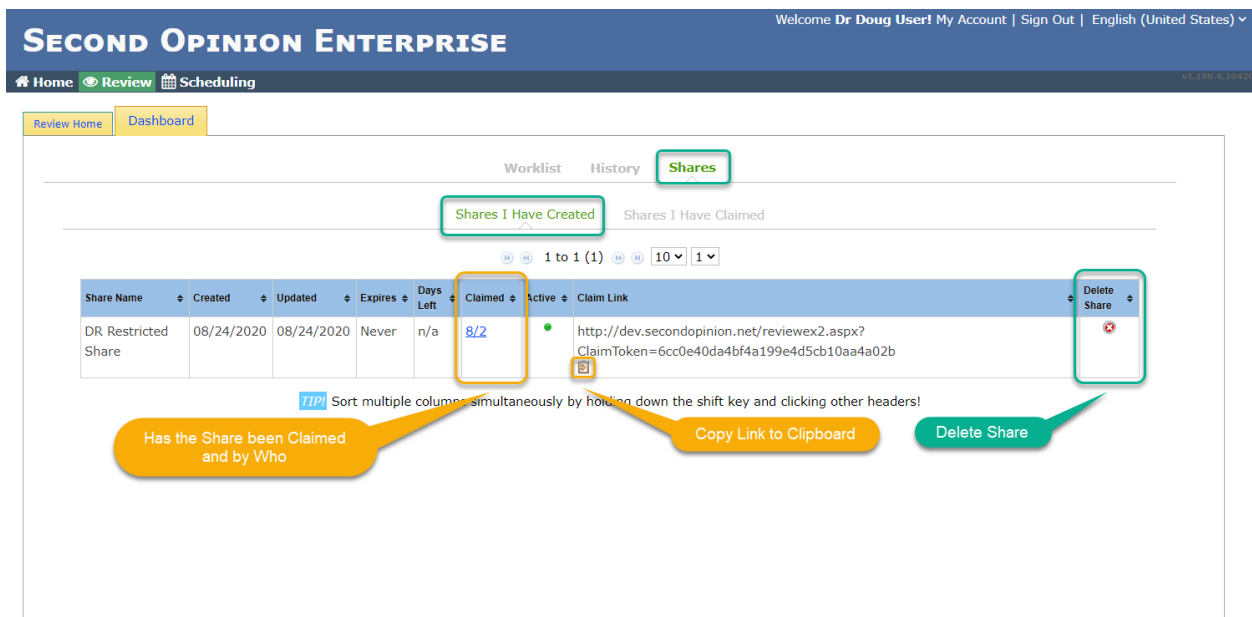
Manage Shares

To manage Shares you have created or claimed, navigate to the **Dashboard**. From the **Review** page, **click** the **Dashboard** tab.

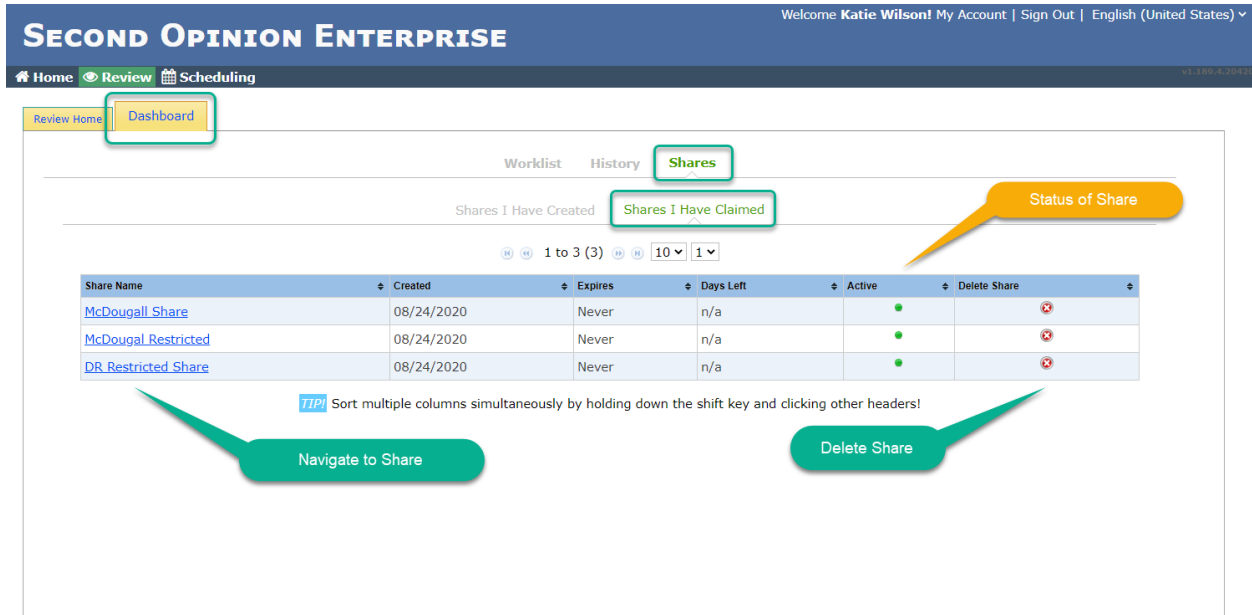


Next **click Shares**. To manage shares you have created, **click Shares I Have Created**. The share dashboard entry displays all of the information about the Share, who has **Claimed** it and the **Claim Link** itself. The Share can be also be deleted.

Note: Once a share has been deleted, it is no longer be accessible to any user.



To view / manage all of the shares you have claimed, **click Shares I Have Claimed**. The share dashboard entry displays all of the information about the claimed shares. **Clicking the Share Name** will navigate to the contents of the Share and **clicking Delete Share** will remove it from your shares.



SECOND OPINION ENTERPRISE

Welcome **Katie Wilson!** My Account | Sign Out | English (United States) ▾

Home Review Scheduling

Review Home Dashboard

Worklist History **Shares**

Shares I Have Created **Shares I Have Claimed**

1 to 3 (3) 10 1

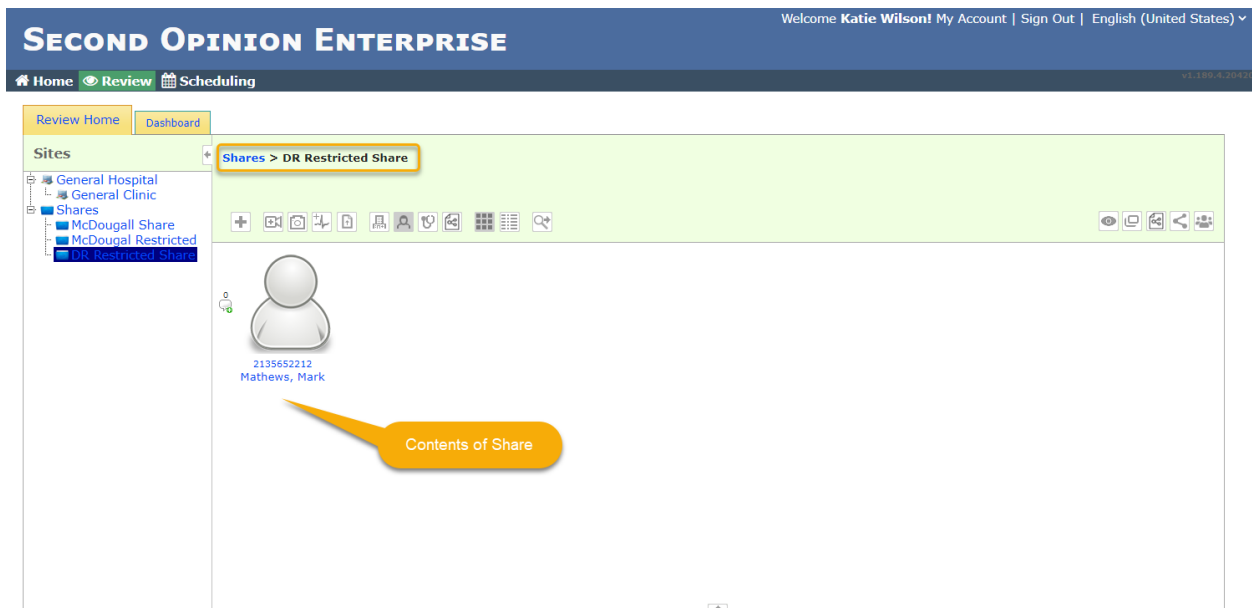
Share Name	Created	Expires	Days Left	Active	Delete Share
McDougal Share	08/24/2020	Never	n/a	●	✕
McDougal Restricted	08/24/2020	Never	n/a	●	✕
DR Restricted Share	08/24/2020	Never	n/a	●	✕

TIP! Sort multiple columns simultaneously by holding down the shift key and clicking other headers!

Navigate to Share

Delete Share

Status of Share



SECOND OPINION ENTERPRISE

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Home Review Scheduling

Review Home Dashboard

Sites

- General Hospital
 - General Clinic
 - Shares
 - McDougal Share
 - McDougal Restricted
 - DR Restricted Share**

Shares > DR Restricted Share

2135652212
Mathews, Mark

Contents of Share



Create External Public User Account

If you click on a share link, it will take you to the Portal **Sign In** page. If you do not have a User account, **click Register** to create one.

Note: An external public User account can only access shares that have been claimed.

Fill in the appropriate User information and **click Save Changes**.

When finished, **Click Save Changes**.

Note: Before the new User account can be used, it has to be verified. Click on the verify email link sent to the entered email address to validate your new account.

Email Validation Required

Please validate your email address by clicking the validation link which was sent to your email address.

Update your email address if there seems to be a problem:

Reply Reply All Forward
 Wed 8/26/2020 3:25 PM
 notify@secondopinionftp.com
 Enterprise Notification System

To: Tim Kaufman

Hi Tim Kaufman,

You've recently registered for an account on the Second Opinion Enterprise website.

Click the link below to validate your email address.

<http://dev.secondopinion.net/EmailValidationRequired.aspx?token=749bf36a6a6c4a56ada1fdeb92f43297>

Please ignore this email if you did not register for this account.

Click on link to validate user account

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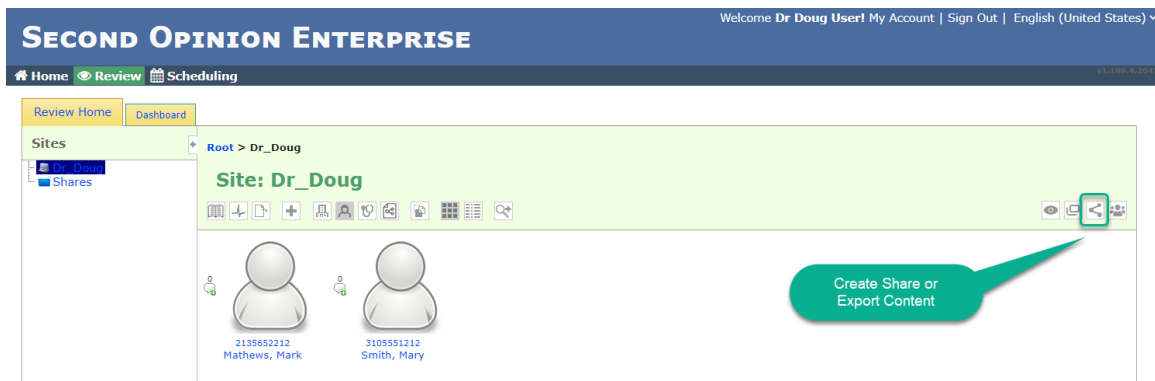
Once the User account has been validated it can be used to log in and access the Share.

The screenshot shows the 'SECOND OPINION ENTERPRISE' web application. The top navigation bar includes 'Home', 'Review', and 'Scheduling'. The user is logged in as 'Tim Kaufman'. The main content area displays a breadcrumb trail: 'Shares > Dr Restricted Share > Mark Mathews (2135652212)'. Below this, the patient's name 'Patient: Mark Mathews (2135652212)' is shown. There are three items listed under the patient's share:

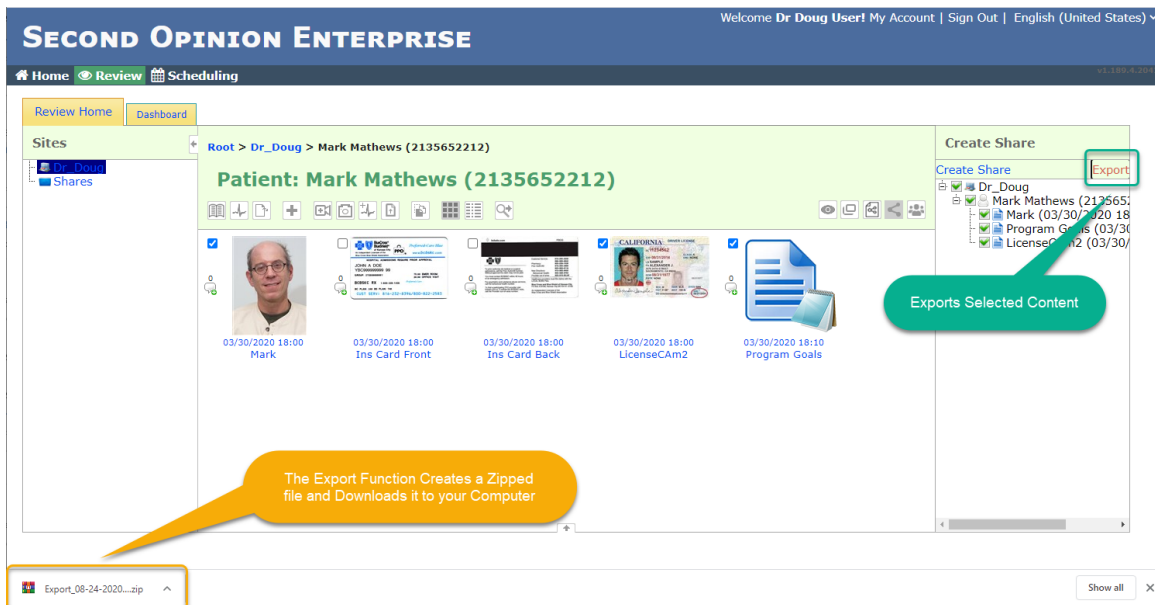
- Mark**: 03/30/2020 18:00
- LicenseCAM2**: 03/30/2020 18:00
- Program Goals**: 03/30/2020 18:10

Exporting Content

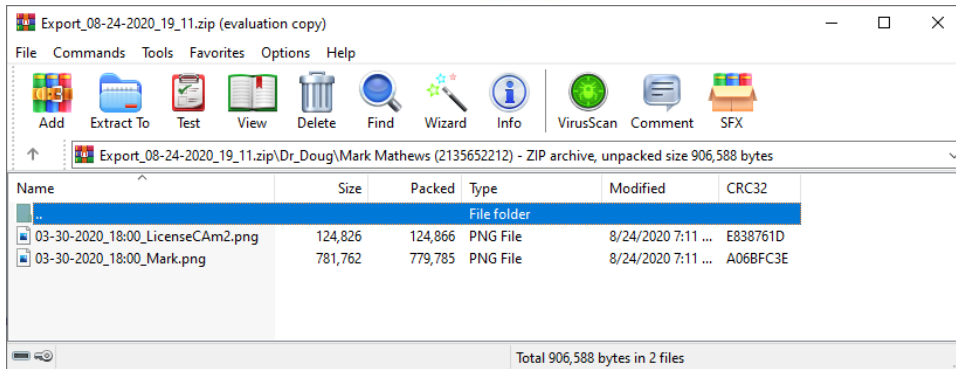
The Enterprise Export tool allows for the exporting of Enterprise content to the local computer. When initiated, all of the selected content is packaged in a Zip file and downloaded. Once the file is downloaded, the contents of the Zip can be extracted and the individual files can be used separate from the Enterprise Portal. It is up the individual person to maintain the integrity and security of these files as they are no longer managed by the Portal.



Select the content to be exported and **click Export**.



Note: Entire Folders or individual Documents can be selected but, only the content that is file based will be exported, no form data. The selected items can be from different Folders as well as from different Sites.



For More Info or Technical Support Give Us a Call

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Tutorial Sharing and Exporting (v1.0)

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