Second Opinion Enterprise Upload a File to a Patient Folder

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The File Upload Utility allows you upload a variety of different document types into a Patient folder. This can include images, video clips, PDFs, Word Documents, etc. Using the File Upload Utility from a mobile device also allows you to upload pictures and videos directly from the camera or the Media Gallery of the device.

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.

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

Click on the Review tab to get to the Patient folder area of the Portal.

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.

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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

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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

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**.

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There is also an **Upload File** to Patient button on the main tool bar.

Click the **File Upload** button

When the **Select files** page appears, either **Click Add Files** and browse to select the file(s) to be uploaded or find the files and **Drag and Drop** them into the **Drag files here** section.

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Once all the files have been queued up, **Click** the **Start upload** button. You will see the status of the uploads and you will know for sure if they have been successfully uploaded.

Note: Each video that is uploaded will be processed to a browser friendly MP4 format. While this processing is occurring, an MP4 icon will be displayed in the Patient folder. Once the processing is complete, the MP4 icon will be replaced with a thumbnail from the video.

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