Provider User Guide

lumeca⁺

Table of Contents

1. Lumeca Virtual Clinic Platform Overview

❏ A virtual visit system that allows scheduling of video and audio sessions between healthcare providers and their patients/colleagues:

- ▪ 'Video Meetings' - (scheduled or on-demand) invited patients/participants do not require a Lumeca Health account but join a meeting via a unique link
- ▪ 'Phone Meetings' - (on-demand) between two participants
- ▪ 'Consultations' - (scheduled) patients must be invited to join the provider's virtual clinic and create a patient Lumeca Health account

❏ Role-based permissions allow the clinic care team to see and/or control as much of the workflow as needed

❏ Patients are seen in a private virtual exam room where they can be viewed and communicated with via video, chat and/or phone

❏ Others (family members, caregivers or other healthcare providers) can be invited to join in (with permission), and all can come and go as needed

2. Access 'Lumeca Virtual Clinic' as a Care Team Member

REQUEST A LUMECA VIRTUAL CLINIC ACCOUNT

- ❑ If you and your clinic are new to Lumeca Health:

  - ▪ Email us at *sales@lumeca.com*, OR

  - ▪ Click this link and send us a message,
    https://lumeca.com/get-in-touch/

- ❑ If you would like an account with an existing
  Lumeca Health Virtual Clinic:

  - ▪ Contact the Office Manager of that clinic

JOIN A LUMECA HEALTH VIRTUAL CLINIC YOU ARE INVITED TO

You will receive an email invitation to create your Lumeca Health Virtual Clinic account.

❑ If you have not received the email, please contact Lumeca Health at info@lumeca.com.

❑ Review your email, paying special attention to the '**Note**', then tap on "**click this link**" under '**Get Started**'

CREATE YOUR ACCOUNT

Navigate to the Lumeca Health Portal Welcome Page

❑ Click '**I Don't Have an Account**'

Note

Use one account and join multiple clinics, if needed.

You must request to be invited to all clinics you work with.

You will receive a separate invitation email for each clinic you need to join and must follow the steps below for each.

❑ Create your account from the link within the <u>first</u> invitation email.

❑ In each subsequent email, tap '**click this link**', then '**I Have an Account**'.

❑ Log in with the username and password you used to create your account.

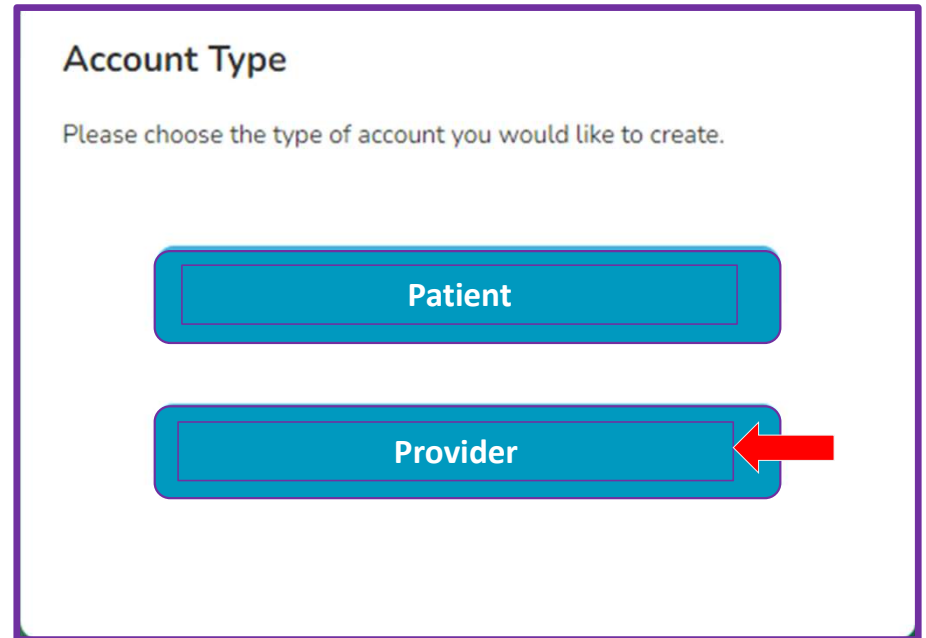❑ You will then be joined with the additional clinic.

CREATE A 'PROVIDER' ACCOUNT

In some rare instances you may be presented with a screen asking you to select the type of account you are creating – Patient or Provider.

If you see this screen,

❑ Click '**Provider**'
   (DO NOT click 'Patient')

Account Type

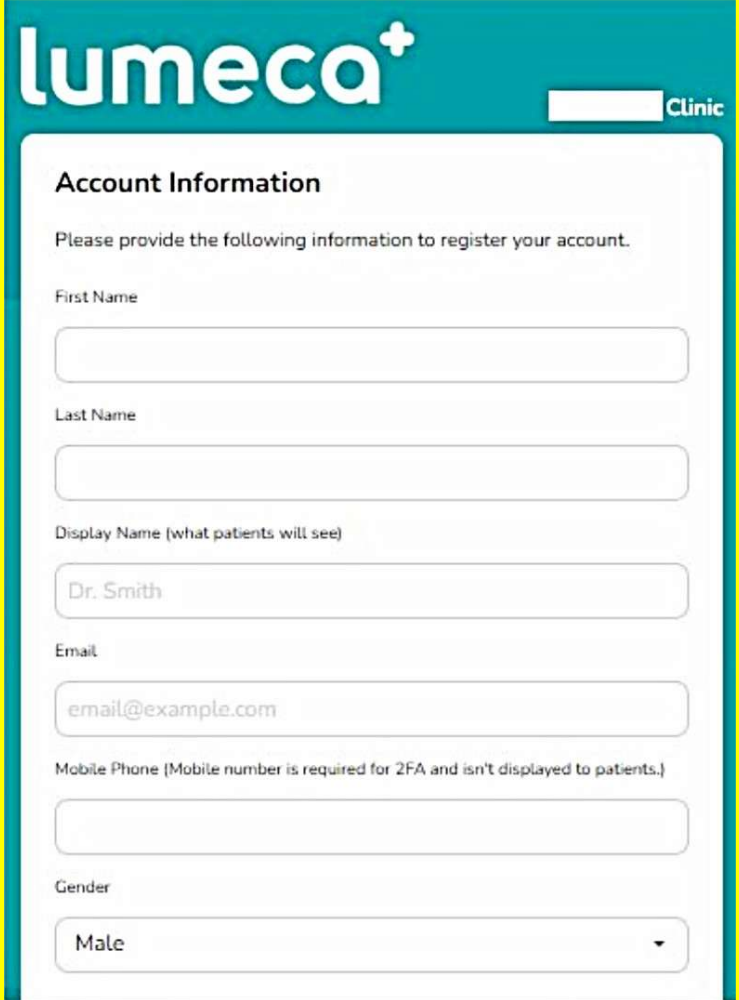Please choose the type of account you would like to create.

Patient

Provider

ACCOUNT INFORMATION

❑ Enter **your** account information

- **All fields are mandatory**

- '**Display Name**' is what your clinic care team and the patients see when they use the platform

- It is recommended you use your **work email**. These must be unique as they are used as account login identifiers.

- Your **mobile number** must be a unique (not shared) cell number and not a landline, as it is used for mandatory two-factor authentication, which you will receive by text. Personal cell numbers are acceptable. *Your cell number is never shared with or visible to patients.*

lumeca⁺ Clinic

Account Information

Please provide the following information to register your account.

First Name

Last Name

Display Name (what patients will see)

Dr. Smith

Email

email@example.com

Mobile Phone (Mobile number is required for 2FA and isn't displayed to patients.)

Gender

Male

CHOOSE A PASSWORD

❑ Create a secure password. As the password requirements are met, checkmarks will automatically appear for each of them.

❑ Read and agree to the '**End User License Agreement**' and '**Privacy Policy**' by adding a checkmark ☑

❑ Click '**Continue**'

YOU ARE NOW READY TO ACCESS YOUR CLINIC !
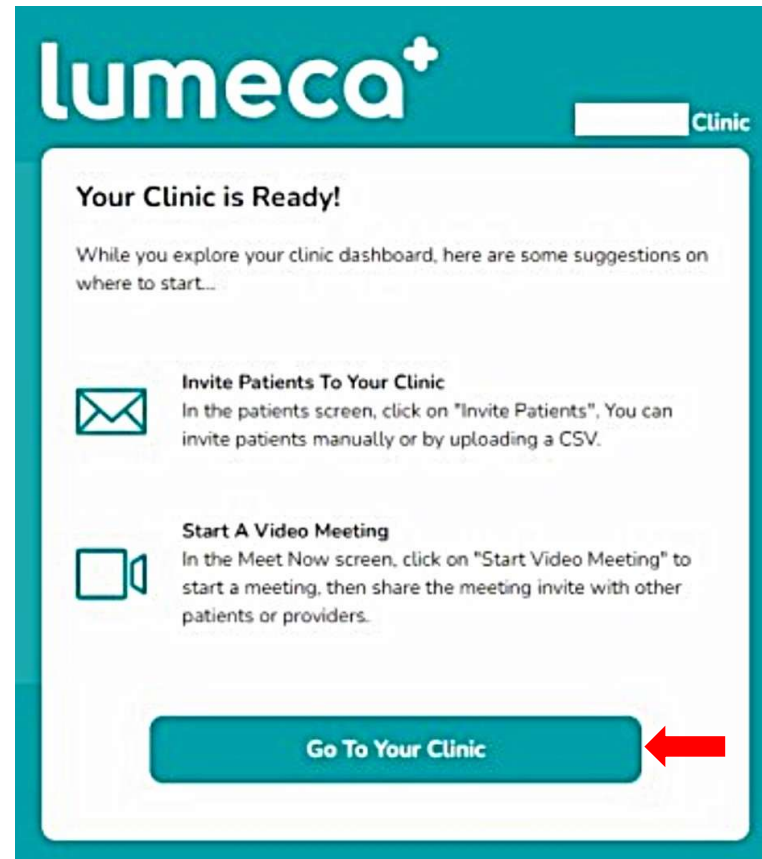
❑ Click 'Go To Your Clinic'

Note:

Once you create your 'Lumeca' account, the link in the invitation email you received will no longer work.

To access the Login screen, go to...

https://lumecaapp.com/app/?screen=login

We suggest you bookmark this Login screen for easy access to the platform.

SET UP 'MESSAGE' NOTIFICATIONS

Lumeca Health has a feature called '**Messages**', where clinical users can initiate or join messages with other registered Lumeca account holders or invite 'Guests' to create a 'guest account' and join their message. These conversations operate independently and are distinct from virtual meetings or patient consultations.
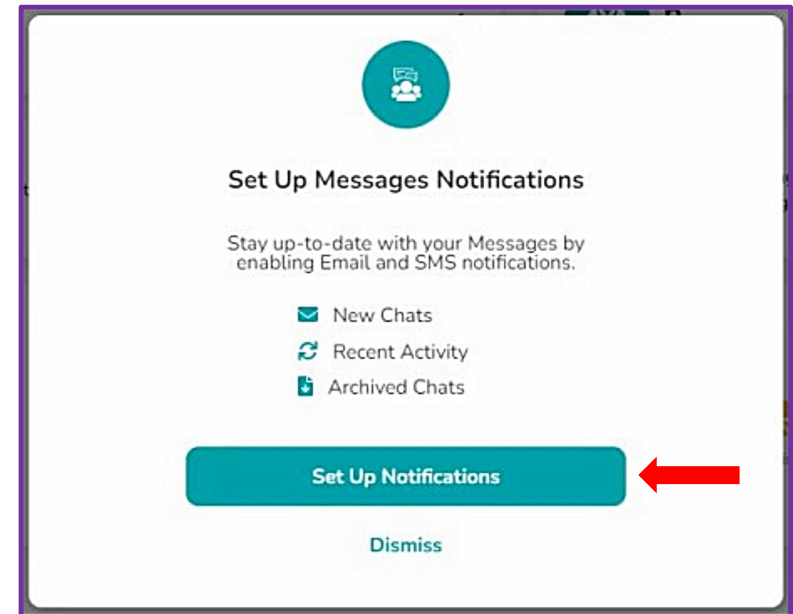
It is recommended you enable your Email and SMS text notifications, so you are informed when:

- You are invited to new chats
- There is message activity
- Chats you are a part of are archived

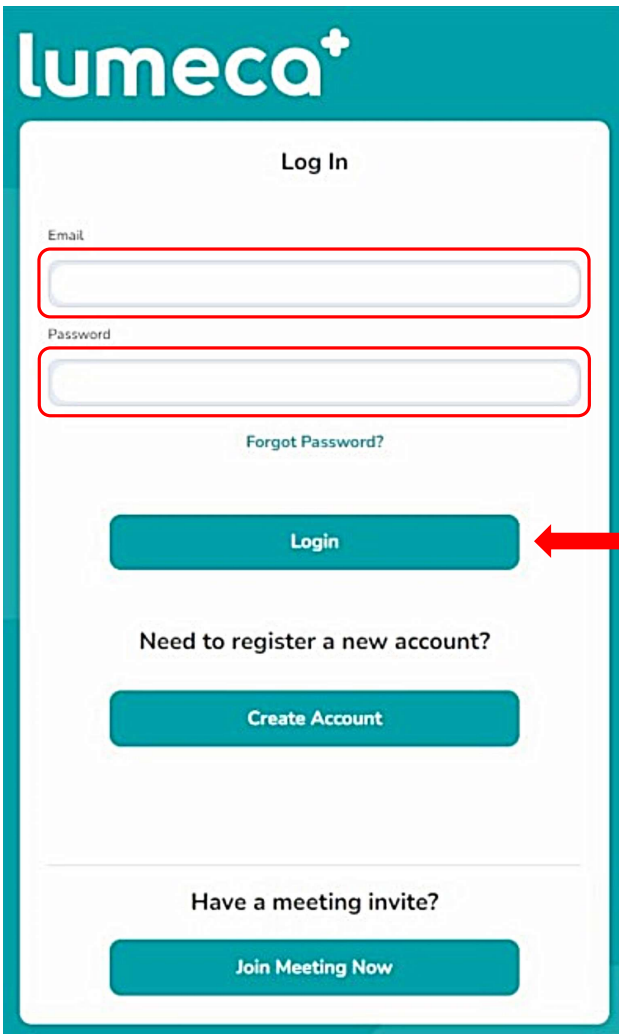❑ Click '**Set Up Notifications**'

You will see the email address and mobile number where your notifications will be sent (pulled from your account information). You may set email and/or SMS text notifications for:
- Patient Connections (when a patient connects to you through the 'Find a Doctor' feature)
- Appointments (new, cancelled, when you are invited to, when a user declines your invitation to), and
- Messages (added to, archived, and when you are removed from)

Set Up Messages Notifications

Stay up-to-date with your Messages by enabling Email and SMS notifications.

✉ New Chats
🔄 Recent Activity
📥 Archived Chats
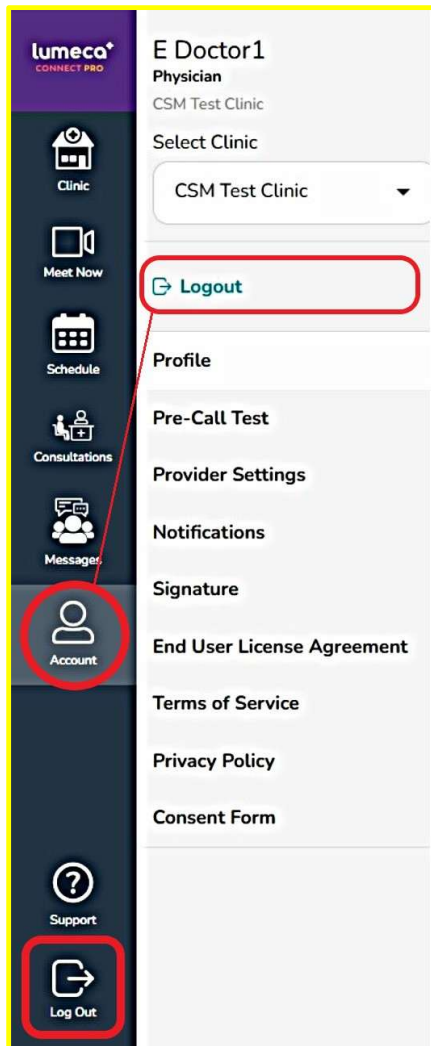
Set Up Notifications

Dismiss

3. Account Login & Logout

ACCOUNT LOGIN

❑ Enter the email address and password you used to set up your Lumeca account.

❑ Click '**Login**'

**REMEMBER TO BOOKMARK
THIS LOGIN PAGE FOR EASY ACCESS**

https://lumecaapp.com/app/?screen=login

ACCOUNT LOGOUT

For security purposes, it is important to properly Logout, rather than simply closing your browser*.

It is also advisable to clear your history at the end of each shift.

There are two areas you can Logout:

- ❑ 'Account' > Logout
- ❑ The bottom of the dashboard > Logout

* There is an automatic 1-hour timeout of your account when you close or exit the browser without manually logging out.

You will remain logged in as long as your browser is open.

4. The 'Home' Screen

HOME SCREEN

The Home screen provides condensed information about your clinic, which is populated from other areas in the platform. You cannot change info here.

Click on any box that contains an arrow ▶ to be directed to the section.

❑ To return to the Home screen, at any time, select '**Clinic**' in the dashboard.

5. Select a Clinic

SELECT YOUR CLINIC

If you are part of more than one virtual clinic, use the '**Select Clinic**' drop-down to select the clinic you are currently working in.

If you are associated with one clinic only, you will only see the name of your virtual clinic and no drop-down.

6. Your Profile Information

YOUR ACCOUNT PROFILE INFORMATION

❑ Select '**Account'** in the Dashboard, then click '**Profile**'.

❑ If changes/additions are made, click '**Save Changes**'.

7. The Pre-Call Test

THE PRE-CALL TEST

It is recommended that you run a 'Pre-Call Test' each time you log into your account, to ensure that your technical equipment, devices and connections are working properly and to allow time to get things working **before** beginning virtual sessions, if required.

- ❑ The Pre-Call Test is available from two places in the platform:
  - ▪ When logged in to your account: select '**Account**', then '**Pre-Call Test**'
  - ▪ When not logged in and joining a video meeting: click '**Test Audio & Video**' on the '**Join a Meeting screen**'

- ❑ Review the screen, then click '**Start Test**'
  - ▪ The system may prompt you for video and camera permission.   If so, press '**Allow**' for both
  - ▪ Set your device on a stable surface and speak during the test, to ensure proper camera and microphone testing

PRE-CALL TEST RESULTS

The test will take approximately 30 seconds, then will time out automatically.

Pre-Call Test

Test Audio and Video Quality

Test completed with no issues detected.
Learn more on our pre-call test wiki page.

Test Results

- ⊘ Microphone detected
- ⊘ Camera detected
- ⊘ Test video room created
- ⊘ Camera started
- ⊘ Call Quality Result: Good

- ⬆ Outgoing bitrate: 3274 kbps
- ⬆ Average bitrate: 2067 kbps
- ⇄ Average round trip: 0.07 secs
- ⇄ Max round trip: 0.08 secs
- ⛬ Average packet loss: 0.0%

Restart Test

❑ **If the Pre-Call test results are good:**
- Proceed to conducting virtual consultations or meetings.

❑ **If the Pre-Call test fails or the results are poor:**
- Make sure other applications on your laptop/computer are not using your camera or microphone or are closed
- Double-check your internet connection
- If possible, use an ethernet or wired connection instead of wireless
- Make sure your microphone and camera are plugged in and set as a system default

Bitrate - the amount of video data transmitted (a higher bitrate usually translates to better quality

Round Trip Time – the time it takes for data packets to complete a round trip from source to destination and back (the efficiency & reliability of your network connection

Packet Loss – incomplete or delayed data transmission

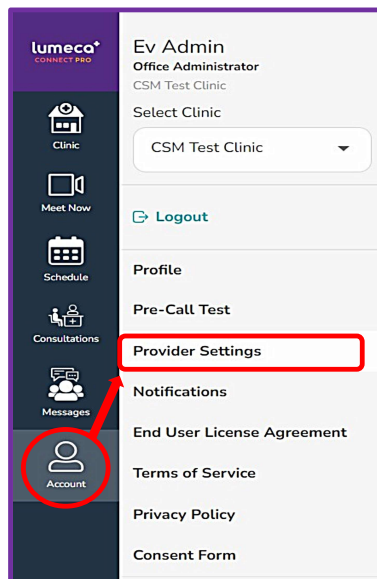# 8. Updating Settings & Notifications

PROVIDER SETTINGS

The Provider Settings ONLY apply for clinics that have the 'Patient Self-Serve Scheduling' feature enabled.
If disabled, for your virtual clinic, this message will appear:

"Appointment Booking" and "New Patient" settings are unavailable because "Patient Self Serve Scheduling" is disabled.

☐ Select '**Account'** from the Dashboard, then click '**Provider Settings'**.

If enabled, there are three settings available:

- **Appointment Booking Lead Time** - the minimum amount of time before a patient can book an appointment

- **Patient Provider Selection** – allows a healthcare provider to permit their patients to consult with other healthcare providers from within their virtual clinic

- **Patients** – indicate whether a healthcare provider is accepting new patients or not

APPOINTMENT NOTIFICATIONS
- Notifications to Clinic Care Team Members -

Notifications are applied on a per clinic user basis.
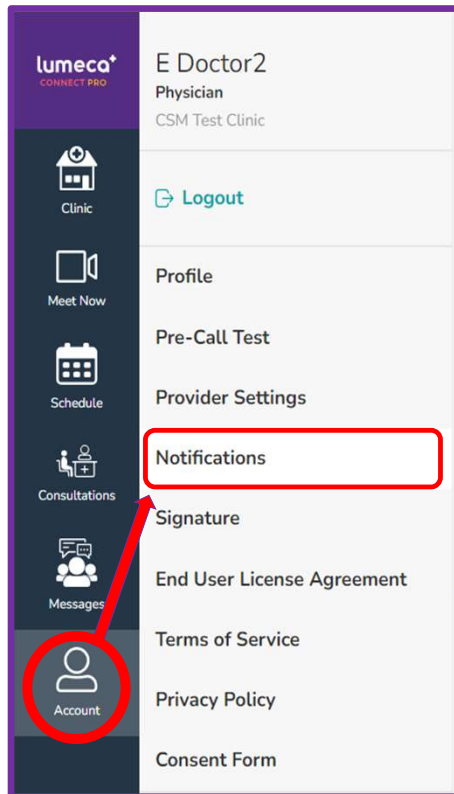
Each care team member must set their own appointment notifications.

Healthcare providers and clinic admins have the option to receive notifications to the email address and/or mobile phone number set in their account profile.

Notifications can be set for:

 Patient Connections
If Enabled

 Appointments
Patient Consultations

 Messages
If Enabled

They can be received by email only, SMS text message only or both.

❑ Select '**Account'** from the Dashboard, then click '**Notifications**'.

❑ The clinic admin must select the healthcare provider they want appointment notifications for, from the drop-down menu. Healthcare providers will not see this drop-down.

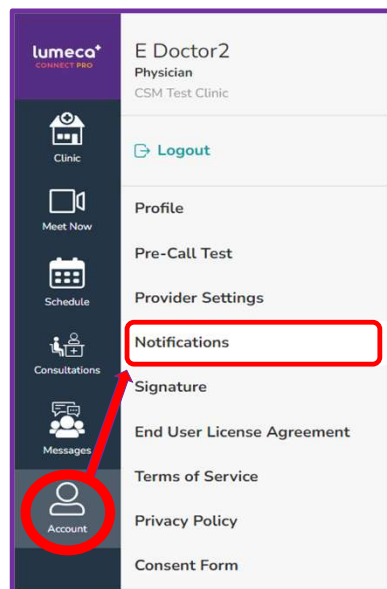❑ Check the desired notifications, then click '**Save**'.

Set up Email & SMS Text Message Notifications

If you have the '**Messages**' feature enabled for your virtual clinic, it is beneficial that you are notified:

- When you are added to a message
- When a message you are a part of is archived by the message host
- When you are removed from a message

Notifications will be sent to the email address and the mobile phone number that are associated with your Lumeca account.

❑ From the left navigation bar, click '**Account**', then choose '**Notifications**'.

❑ Check the notifications that you want sent via email or SMS text message.
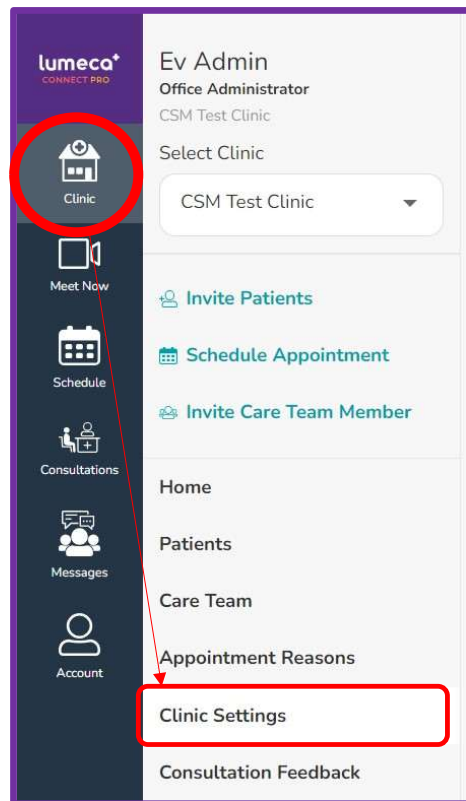
❑ When ready, click '**Save**'.

CLINIC SETTINGS

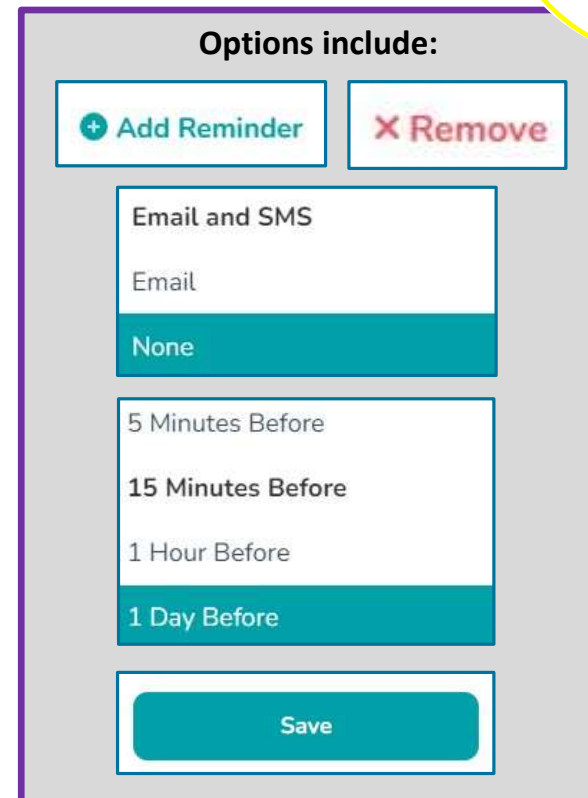## - Appointment Notifications & Reminders to Patients/Participants -

It is highly recommended that you send patients/ participants appointment reminders for their scheduled patient consultations, via email and/or SMS text message.

These settings are set for the entire clinic, not for individual users. Any changes will impact all clinic care team members.

❑ Select '**Clinic**' in the dashboard, then '**Clinic Settings**'

The '**Appointment Notifications and Reminders**' section is at the top of this screen

Options include:

CLINIC SETTINGS

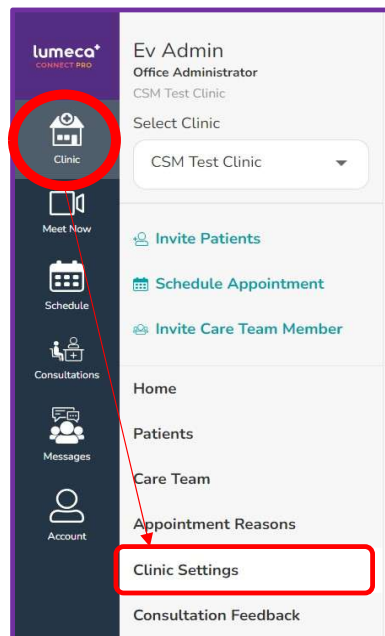### - Quick Messages to Patients/Participants -

Quick Messages help healthcare providers, or their clinic admin manage 'patient consultations' by sending a message to patients before the consultation begins. Note: they do not work for 'Meet Now' virtual meetings.

They are accessed from the 'Active & Waiting' screen, however, are overseen here under '**Clinic Settings**'.
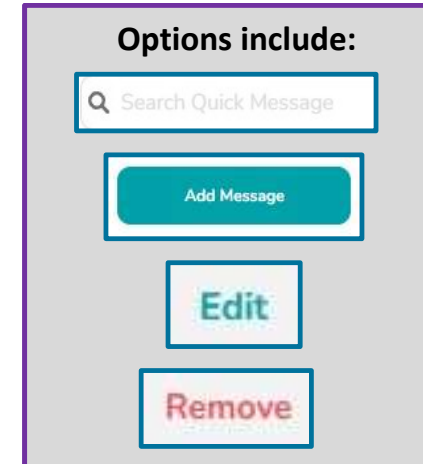
Patients receive these messages within the consultation itself as a chat message.

There are preset 'Quick Messages' available OR new ones can be created for the entire clinic OR customized for individual healthcare providers.

These are created by clinic admins on behalf of the healthcare provider.

❑ Select '**Clinic**' in the dashboard, then '**Clinic Settings**'.

❑ Scroll down to '**Quick Messages**' to view, edit, remove or add messages.

Options include:

Q Search Quick Message

Add Message

Edit

Remove

ADD A NEW QUICK MESSAGE

❑ Select '**Clinic**' in the dashboard, then '**Clinic Settings**'.

❑ Scroll down to '**Quick Messages**' and click '**Add Message'.**

❑ If you are the clinic admin, Under **'Provider'**, select a particular healthcare provider or choose '**All'** healthcare providers in the clinic.

❑ When creating a new message for '**All**' providers, you have an option to add the provider's name into the quick message. To do this, click **'Insert Provider Display Name Variable'** in the exact spot where you want their name to appear in the Quick Message.

❑ Complete the new message, then click '**Add Quick Message**'

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9. Appointment Reasons

MANAGING APPOINTMENT REASONS

These preset Appointment Reasons are used when scheduling patient consultations and help the clinic care team prepare for the appointment.

❑ Select '**Clinic**' in the dashboard, then click '**Appointment Reasons**'.

Appointment Reasons are applied on a per clinic user basis and may be set by either healthcare providers or the clinic admin on behalf of the healthcare provider

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CONNECT PRO

E Admin
Office Administrator
CSM Test Clinic

Select Clinic

CSM Test Clinic ▾

👤 Invite Patients

📅 Schedule Appointment

👥 Invite Care Team Member

Home

Patients

Care Team

Appointment Reasons

- Clinic
- Meet Now
- Schedule
- Consultations
- Messages
- Account

❑ Clinic admins must select the correct healthcare provider from the '**Provider**' drop-down menu.

Healthcare providers will not see this drop-down.

Provider

Providers ▲

Bouffay, Phoebe

Connect, Ruffo

Gellar, Ross

Marshall, Dr E

Reid, Riley

Strange, Steven

❑ Select '**Add Reason**'.

❑ Type in the new appointment reason, a duration that is suitable. Note – at the time appointments are being scheduled, the preset duration may be overridden.

❑ When ready, click '**Add Reason**'.

Add Appointment Reason

Appointment Reason

Follow-up - Dr Jones

Appointment Duration

20 minutes ▾

Add Reason

Cancel

❑ Click the '**3 dots**' to '**Edit**' or '**Remove**' an appointment reason

••• Other

Edit
Remove

10. Managing Healthcare Provider's Schedule & Calendar

MANAGING SCHEDULES

Your clinic's regular EMR system should be used however, a provider's schedule <u>MAY</u> be added into this platform, although not necessary to schedule appointments or meetings.

❑ Select '**Schedule**' in the dashboard

Clinic admins can view and update calendars on behalf of the healthcare providers within their clinic.

They must select the healthcare provider's name from the **'Select Schedule'** drop-down list.

VIEWING APPOINTMENTS

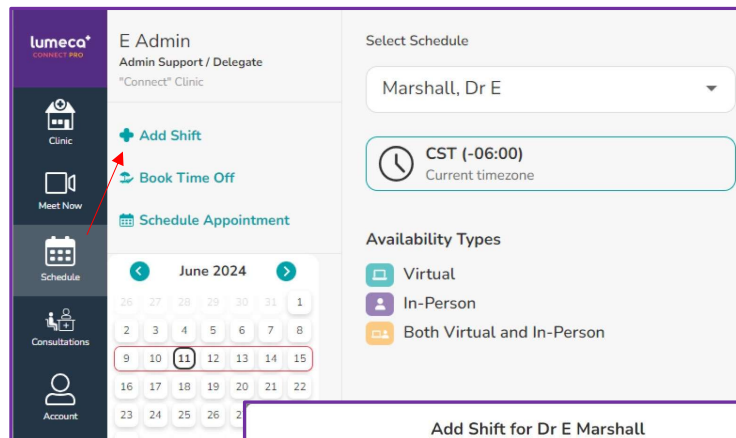| MONTH View:	DAY View:	WEEK View:
▪ Click on an individual day or 'Today'. ▪ Click on 'This Week' ▪ Hover over a day to see the number of appointments scheduled.	▪ The day's view of the schedule. ▪ Click on an appointment to + Enter, X Cancel the entire appointment or X Decline an invitation to it, or ⓘ to get/send the shareable Join-In info. ▪ Delete a shift.	▪ A 7-day view of the schedule. ▪ Click on an appointment for details, to enter, cancel the entire appointment, decline an invitation to it, or to get/send the shareable Join-In info.

ADD A HEALTHCARE PROVIDER'S SHIFT

❑ Select '**Schedule**' in the dashboard

❑ Click '**Add Shift**'

❑ Select the **day** you wish to add the shift to

❑ Select the from/to **time**

❑ Select the **type of care** (virtual, in-person, or both)

❑ Choose the '**Occurrence**'

❑ Choose an **end date** (if recurring occurrence)

❑ Click '**Add Shift for ...**'

BOOK TIME OFF

This feature can be used to indicate times unavailable for full or partial days (such as breaks).

- ❑ Select '**Schedule**' in the dashboard
- ❑ Click '**Book Time Off**'

- ❑ Select the **day** you wish to add the time off to
- ❑ Select the from/to **time**
- ❑ Choose the '**Occurrence**'
- ❑ Choose an **end date** (if recurring occurrence)
- ❑ Click '**Book Time Off**' and confirm

The time off will appear in the calendar as '**Unavailable**'

OVERLAPPING APPOINTMENTS

- If scheduled video meetings or consultations overlap with other appointments that a host provider or an invited provider currently has, a notification will appear to the person doing the scheduling (clinic admin or host provider).

- A **maximum of three** (3) overlapping video meetings or consultations can be booked into a provider's schedule.

- In '**Week View**', the overlapping appointments will show the number of appointments, in a box with a hashed background, within the affected timeslot.

- In '**Day View**', the overlapping appointments will show each appointment, within the affected timeslot

Overlapping – Week View

Overlapping – Day View

11. 'Meet Now' Meetings vs Patient Consultations

'Meet Now' Meetings vs Patient Consultations

Video Meeting

Meetings allow you to quickly talk with a patient, their participants and other care providers.

- ✔ Invite other participants
- ✔ Record Video
- ✘ Patient Information and History
- ✘ Past Consultations
- ✘ Note Taking
- ✘ Kept in Patient's History

- **Patients/invited participants _DO NOT_ require a 'Lumeca Health' account to join a video meeting.**

- Meetings are a way to meet with others (specialists, clinicians, patients, patient's family members or caregivers) via video or phone when patient info and history, past consultations, consultation notes, are not required.

- **Video Meetings**: multiple participants may be invited by a clinic to attend with a meeting ID and passcode that is sent via email, SMS text message or given verbally

- Meetings can be held immediately or scheduled into the healthcare provider's clinic schedule.

- Meetings will include a video call and, if needed, a phone call.

- **Phone Meetings**: held immediately with two participants only. The healthcare provider's phone number will not be displayed to the patient.

Consultation

A consultation is the preferred way to see and speak to a patient for diagnosis and questions.

- ✔ Invite other participants
- ✔ Record Video
- ✔ Patient Information and History
- ✔ Past Consultations
- ✔ Note Taking
- ✔ Kept in Patient's History

- **Patients _DO_ require a 'Lumeca Health' account to join their patient consultation.**

- Patients must be invited by the clinic to join the virtual clinic.

- Patient consultations include patient information and history, past consultations, and consultation notes (if entered). This information is saved within the system.

- Patient consultations are booked into the healthcare provider's clinic schedule on this platform.

- Patients may invite up to two guests to their virtual consultations. Invited guests **MUST** create and log into a '**Lumeca Health**' account when invited by the patient.

- Healthcare providers may invite multiple guests (specialists, clinicians, patient family members or caregivers) to their patient's virtual consultation as well. Invited guests **DO NOT** require a '**Lumeca Health**' account when invited by the healthcare provider.

- Patient virtual consultations will include a video call and, if needed, a phone call.

12. 'Meet Now' Video & Phone Meetings

'MEET NOW' MEETINGS

There are 3 options for conducting 'Meet Now' meetings

1. Start an Immediate Video Meeting
2. Start an Immediate Phone Meeting
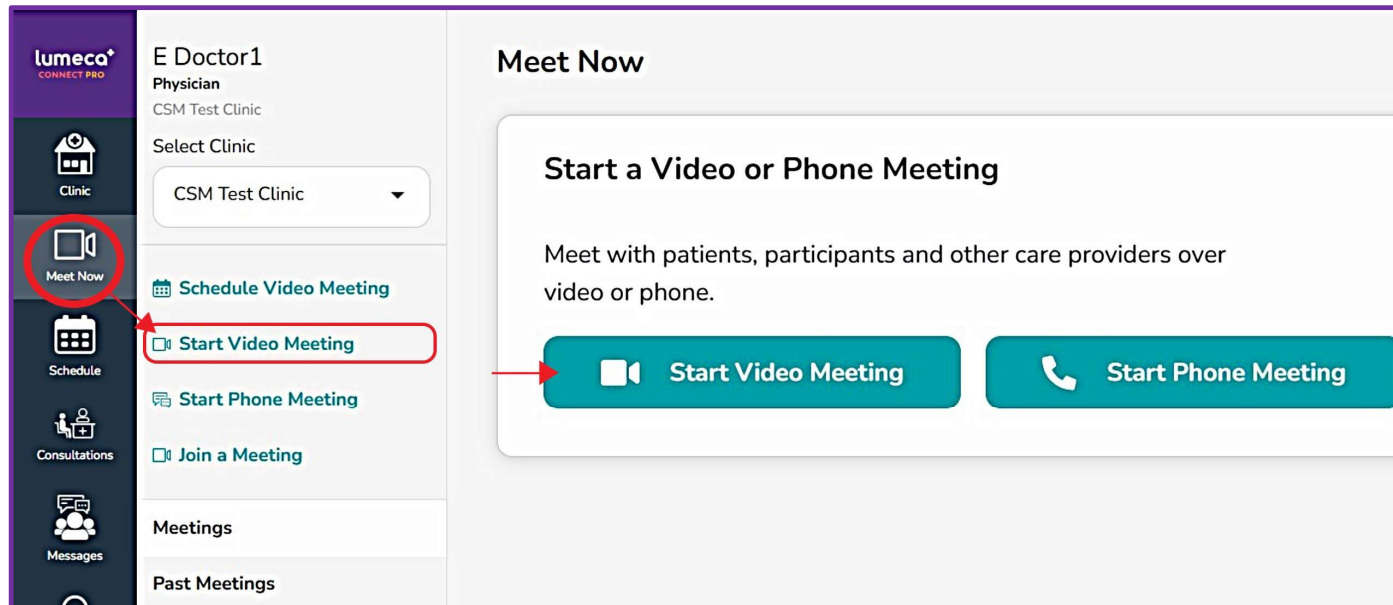3. Schedule a Video Meeting

Video Meeting

Meetings allow you to quickly talk with a patient, their participants and other care providers.

- ✔ Invite other participants
- ✔ Record Video
- ✖ Patient Information and History
- ✖ Past Consultations
- ✖ Note Taking
- ✖ Kept in Patient's History

❑ These meetings allow you to quickly consult with a patient, their family or caregivers, other healthcare providers, specialists or members of your clinic's care team by video or phone, without scheduling a consultation and without your invited participants requiring a Lumeca Health Account.

❑ 'Meet Now' meetings do not contain patient, medical history, or past consultation information.

❑ You may enter a short note once a video meeting is complete for referencing in the future, i.e. reference to your EMR patient file.

Start an Immediate Video Meeting – Step 1

□ Select 'Meet Now' in the dashboard, then click 'Start Video Meeting'.

□ Review the screen.

□ Enable your microphone, camera and select whether you wish to save these preferences for future meetings. If you are currently on the phone with your participant, ensure the 'microphone' setting is unchecked, as you will be speaking with them over the phone and only require video.
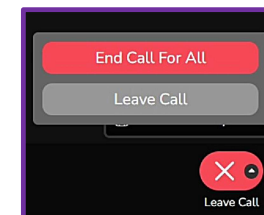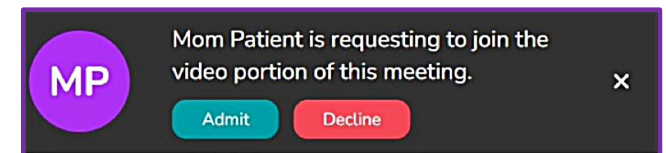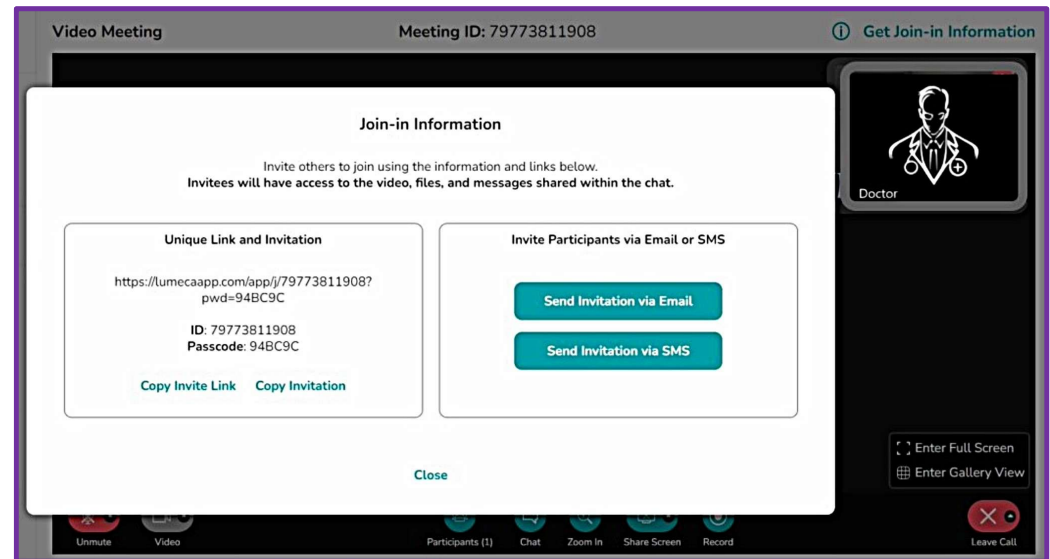

□ Click 'Next'.

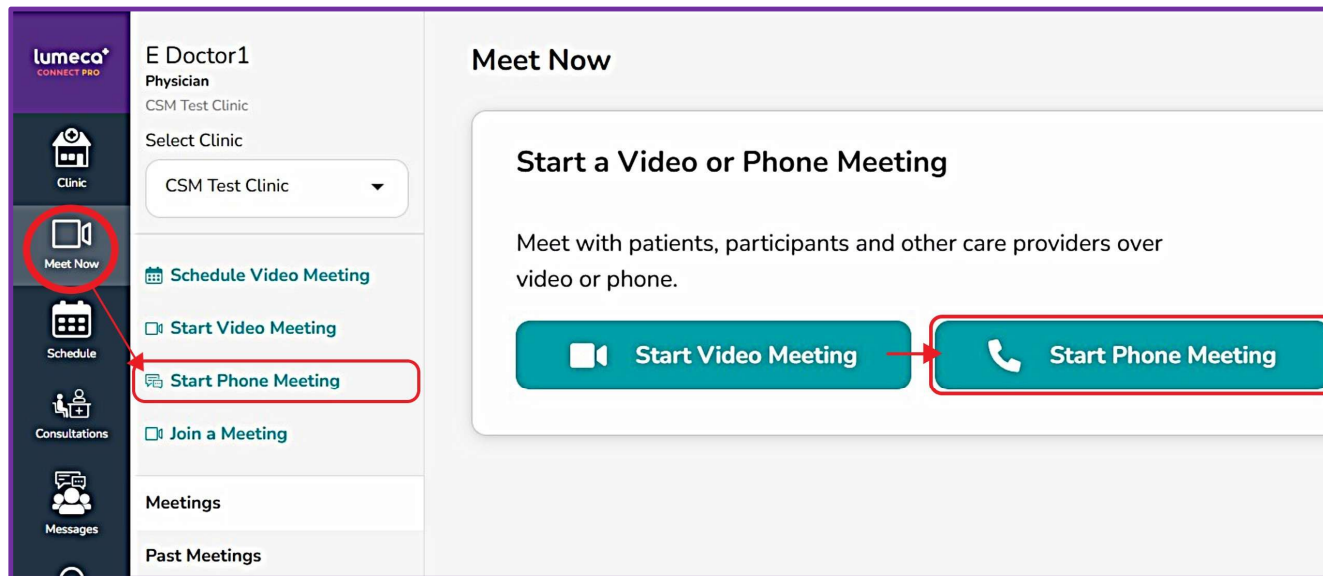You will be taken directly into the video meeting.

Invite Guests to a Video Meeting – Step 2

The '**Meeting Join-In Information**' screen will appear.

❑ The '**Send Invitation via Email**' button uses your computer's default email account (any email system can be used).

❑ If one other than your computer's default is desired, select either:

- '**Copy Invite Link**' (meeting 'https…' web link only), or

- '**Copy Invitation**' (entire meeting invitation info) and email it to your participant(s) using the email system you prefer, or

- '**Send Invitation via SMS**' (text message). *May not be enabled for your clinic.* Your participant's mobile number will be required.

❑ As participants arrive, the meeting host must either '**Admit**' or '**Decline**' them.

❑ Completing/leaving the meeting:
- '**End Call for All**' - the host completely ends the meeting for all participants (invited participants do not have this feature)
- '**Leave Call**' - the host and invited participants may leave and return to the meeting

Start an Immediate Phone Meeting

Phone Meetings only happen between TWO people, the meeting host and one other person.

- ❑ Click '**Meet Now**' in the dashboard, then select '**Start Phone Meeting**'

- ❑ Review the screen, then click '**Next**'

- ❑ Enter the patient/participant's phone number and your number (your number is never shared and remains hidden)

- ❑ Click '**Start Phone Call**' (the system will call the host first; after they pick up, it will automatically call the other participant)
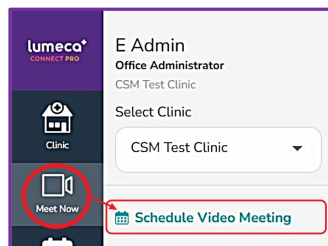
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Schedule a Video Meeting - Step 1

There are three areas within the platform where 'Meet Now' video meetings can be scheduled...

A clinic admin can schedule video meetings on behalf of the healthcare providers within their virtual clinic.

1. The 'Meet Now' tab >
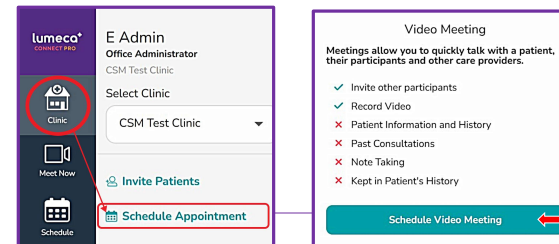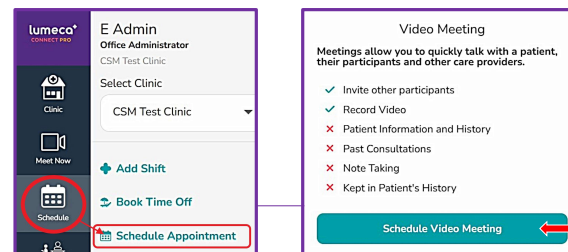- Select '**Meet Now**' > '**Schedule Video Meeting**'

2. The 'Clinic' tab >
- Select '**Schedule Appointment**' > '**Schedule Video Meeting**'

3. The 'Schedule' tab >
- Select '**Schedule Appointment**' > '**Schedule Video Meeting**'

Schedule a Video Meeting – Step 2

- ❑ Enter a **'Meeting Title**'

- ❑ Clinic admins must select the healthcare provider's name from the '**Select Provider**' drop-down menu.

- ❑ If additional providers from the same virtual clinic are being invited to the meeting, click **'+ Invite Another Provider'.**

- ❑ Add their name from the '**Provider**' drop-down menu. If someone is added by mistake, click the red '**x**' beside their name, to remove them from the list.

- ❑ Once complete, click '**Next**'

Schedule a Video Meeting - Step 3

'Date' - Enter the date of the meeting or, if scheduling recurring meetings, the first meeting date.

'Length' - the length of the meeting (this is approximate; the appointment will not automatically end if it extends past this time).
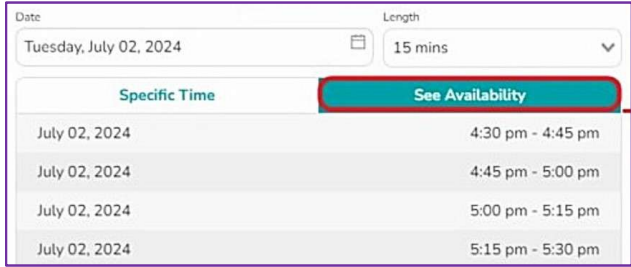

When scheduling <u>a single provider</u> and their schedule **IS NOT** entered in 'Lumeca':

❑   Select **'Specific Time'**

❑   Under **'Start Time'** select the time of day the appointment(s) will start

When scheduling <u>a single provider</u> and their schedule **IS** entered in 'Lumeca':

❑   Select **'See Availability**'

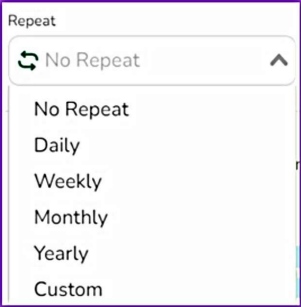❑   Select an available time from the list

When scheduling <u>multiple providers</u> from the same virtual clinic to join a meeting, the **'See Availability'** and **'Specific Time'** buttons <u>will not</u> appear.

❑   Select a meeting **'Start Time**'.

Schedule a Video Meeting - Step 4 - 'Repeat'

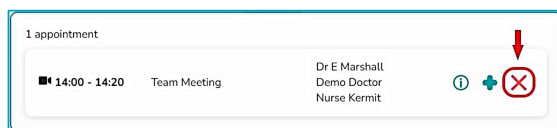|	
If scheduling a <u>one-time</u> meeting, select '**No Repeat**'.	
If scheduling <u>recurring</u> meetings, **choose the occurrence**: ▪ Daily – occurs every day, Monday thru Sunday ▪ Weekly – any day of the week, Monday thru Sunday ▪ Monthly – any day of the month OR the ordinal of a weekday ▪ Yearly – same day every year OR the ordinal of a weekday of a month ▪ Custom – every # of days (99 is max), every # weeks, every # of months	
Under '**End Date**', select the date the last meeting is to occur. A note will indicate the appointment(s) being scheduled.	This will create 7 appointments for Team Meeting with Demo Doctor1 and Demo Doctor2.
If scheduled video meetings overlap with other appointments that a host provider or an invited provider currently has, a notification will appear to the person doing the scheduling (host provider or clinic admin).	⚠ This appointment overlaps with other appointments at this time (3 max)
Click '**Schedule Appointment**'.	Schedule Appointment

Cancel a Scheduled Meeting

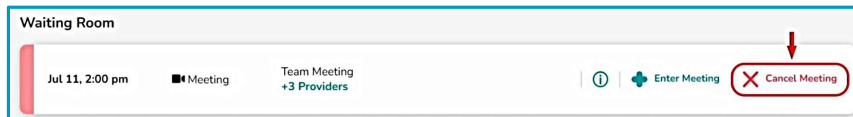Note: Scheduled appointments cannot be edited; they must be cancelled and rescheduled.

- Log into your account as the meeting host or the clinic admin
- Go to either '**Schedule**' or '**Consultations**' in the dashboard. In the '**Schedule**' tab (in 'Week' or 'Day' view), you must click on the meeting you want to cancel.
- Select '**X – Cancel Meeting**'
- A pop-up will appear asking you to confirm.

- Done by the host provider or the clinic admin
- Cancels the appointment entirely and removes it from all invited providers' schedules
- All invited providers will receive a notification, based on their 'Notification Settings' (found under 'Account').
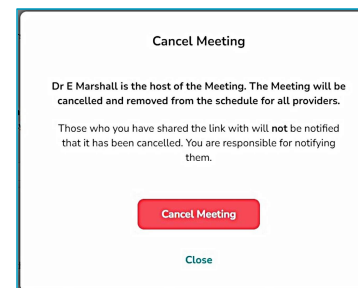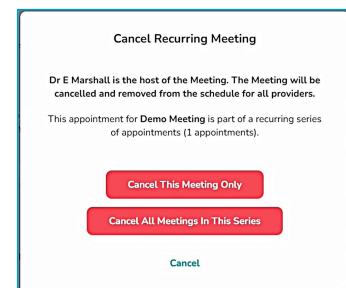
'Schedule' Tab

1 appointment		
14:00 - 14:20 Team Meeting	Dr E Marshall Demo Doctor Nurse Kermit	ⓘ ✚ ⊗

'Consultations' Tab

Waiting Room

| Jul 11, 2:00 pm | ◼ Meeting | Team Meeting +3 Providers | | ⓘ ✚ Enter Meeting ✕ Cancel Meeting |

Confirm 'One-Time' Meeting

Cancel Meeting

Dr E Marshall is the host of the Meeting. The Meeting will be cancelled and removed from the schedule for all providers.

Those who you have shared the link with will **not** be notified that it has been cancelled. You are responsible for notifying them.

Cancel Meeting

Close

Confirm 'Recurring' Meetings

Cancel Recurring Meeting

Dr E Marshall is the host of the Meeting. The Meeting will be cancelled and removed from the schedule for all providers.

This appointment for **Demo Meeting** is part of a recurring series of appointments (1 appointments).

Cancel This Meeting Only

Cancel All Meetings In This Series

Cancel

Decline an Invitation to a Scheduled Meeting

- Done by the invited provider or the clinic admin
- Removes the appointment from their schedule only and will not change the appointment or schedules of other invited providers.
- The meeting host and office admin will receive a notification, based on their 'Notification Settings' (found under 'Account').

❑ Log into your account as the invited clinician or the clinic admin.

❑ Go to either '**Schedule**' or '**Consultations**' in the dashboard. In the '**Schedule**' tab (in 'Week' or 'Day' view), you must click on the meeting you want to decline.

❑ Select '**X – Decline Meeting**'

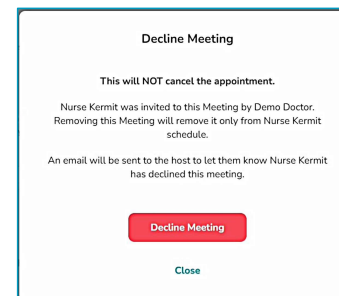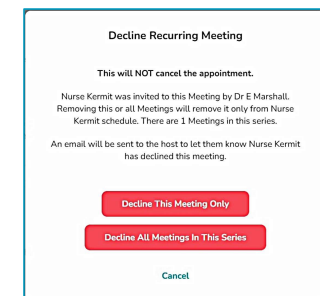❑ A pop-up will appear asking you to confirm.

'Schedule' Tab

1 appointment				
◼ 14:00 - 14:20	Team Meeting	Dr E Marshall Demo Doctor Nurse Kermit	ⓘ ✚ ⊗	

'Consultations' Tab

Waiting Room

Jul 11, 2:00 pm   ◼ Meeting   ● Invited by Dr E Marshall   Team Meeting +3 Providers   ⓘ | ✚ Enter Meeting   ✕ Decline Meeting

Confirm 'One-Time' Meeting

Decline Meeting

This will NOT cancel the appointment.

Nurse Kermit was invited to this Meeting by Demo Doctor. Removing this Meeting will remove it only from Nurse Kermit schedule.

An email will be sent to the host to let them know Nurse Kermit has declined this meeting.

Decline Meeting

Close

Confirm 'Recurring' Meetings

Decline Recurring Meeting

This will NOT cancel the appointment.

Nurse Kermit was invited to this Meeting by Dr E Marshall. Removing this or all Meetings will remove it only from Nurse Kermit schedule. There are 1 Meetings in this series.

An email will be sent to the host to let them know Nurse Kermit has declined this meeting.

Decline This Meeting Only

Decline All Meetings In This Series

Cancel

Patient Wants to Cancel Their Scheduled "Meet Now" Meeting

- Patients do not need a Lumeca account to join 'Meet Now' meetings; they can simply click an 'https/…' quick link in their email or SMS text message to access them.

- 'Meet Now' virtual meetings are not visible when patients are logged into their account, if they have one.

Therefore, if they wish to cancel or reschedule a 'Meet Now' meeting, patients should contact their healthcare provider's clinic directly.

Past Meetings

❑ Click '**Meet Now**' in the dashboard, then select '**Past Meetings**'.

❑ Use the '**Search**' criteria to find a specific meeting:

- ▪ Participant Name
- ▪ Date Range
- ▪ Care Team Member (only available to clinic admins)
- ▪ Type (video or phone)

13. Video Session Features

'Admit' or 'Decline' Users into the Video
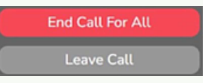
❑ All present care team members of your virtual clinic can '**Admit**' or '**Decline**' participants who are requesting to enter the video call.

❑ This can be done using the popup that appears over the video screen or from the 'Participants' button.

❑ When a user is 'Declined' from joining the call, they will be notified however, may attempt to re-join, in the event they were declined in error.
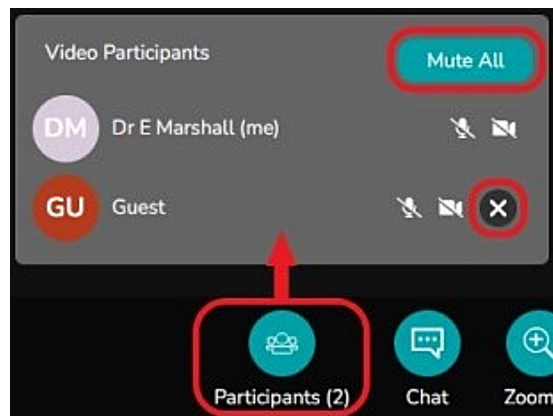
Video Features

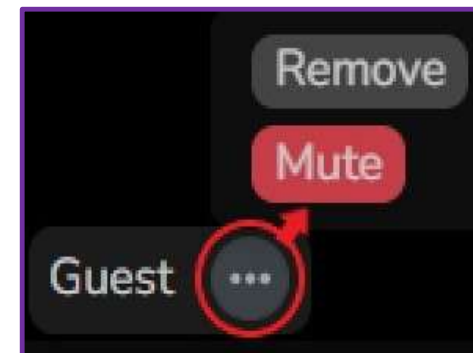|	
Enter Full Screen Exit Full Screen	Enter Full Screen / Exit Full Screen
Enter Speaker View	Video layout where the speaker shows larger to other participants – shared screens are visible in this view only
Enter Gallery View	Video layout where all participants are equal size on a grid – shared screens are not visible in this view
Mute	Mute/unmute yourself. Click the drop-down menu beside Mute to change selection of your microphone and speaker.
Video	Turn your video on/off. Click the drop-down menu beside Video to change selection of your camera, to blur your background or change your background image.
Participants (1)	Click to see participant names. The host can mute/unmute any or all participants or turn their camera on or off.
Chat	Chat with participants. Note: all participants can see the chat
	Upload photo, document or video. In a patient consultation, found below the 'Message' bar. In a meeting, found under the 'Chat' tab.
Leave Call End Call For All Leave Call	Leave Call – leave the video chat. If participants leave the call, the video will stay active for a short time, allowing them time to re-enter the video. End Call for All – ends the video chat completely. Those from outside the virtual clinic cannot do this.
Share Screen Record Dial In	Share Screen, Record & Dial In are discussed in more detail on the following screens.

Managing Participants

By clicking the '**Participants**' button, the meeting host can:

- See a list of participants who are in the video
- See who is muted/unmuted
- See who has their camera on or off
- **'Mute All**' participants
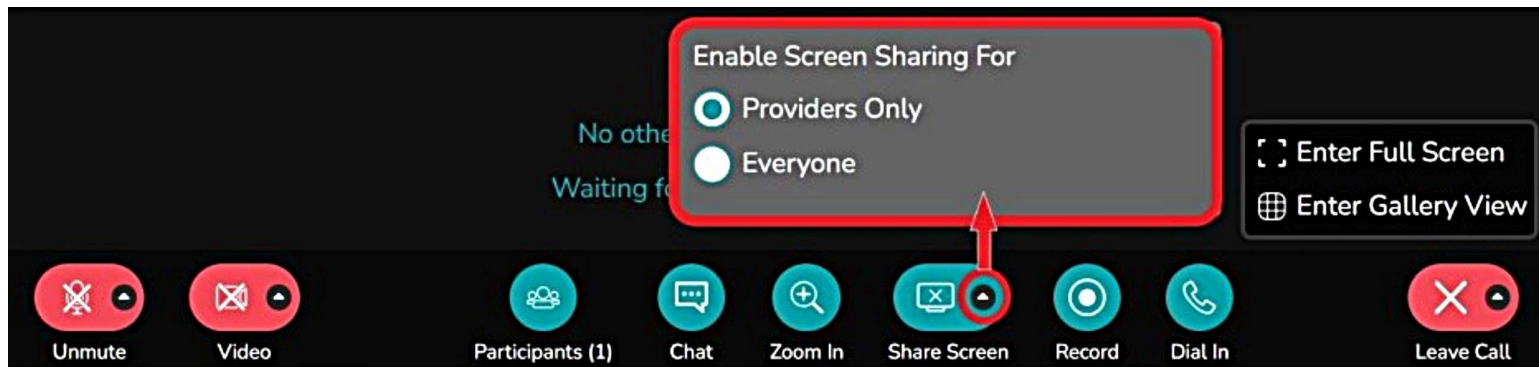- Click the '**X**' to immediately remove a participant from the video

By clicking the '**3 dots**' in the lower-left corner of a participant's video, the meeting host can:

- **'Mute/Unmute**' a specific participant
- '**Remove**' a specific participant

Sharing a Screen Within a Video

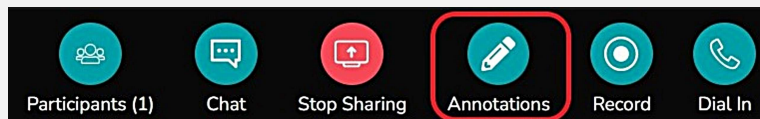All participants within the video call can share their screens and annotate, <u>if enabled by the video chat host</u>.

❑ The host would click the small arrow next to '**Share Screen**', then choose '**Providers Only**' or '**Everyone**'

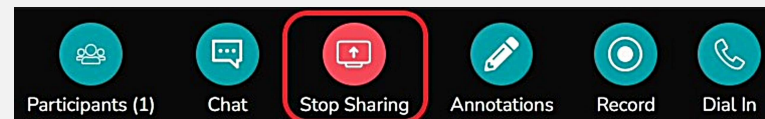Once the screen is shared and visible, new buttons appear along the bottom of your video screen:

Annotations
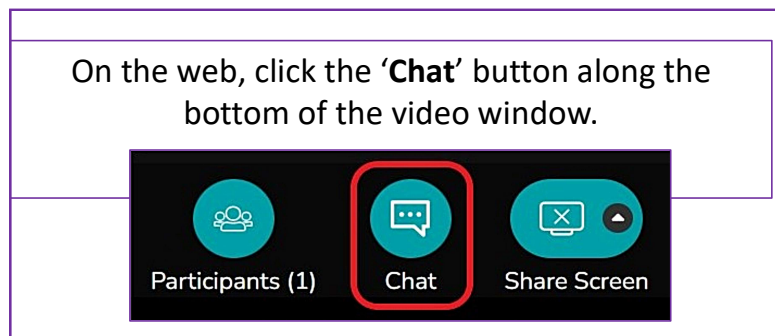Click to highlight specific areas on your shared screen

Stop Sharing
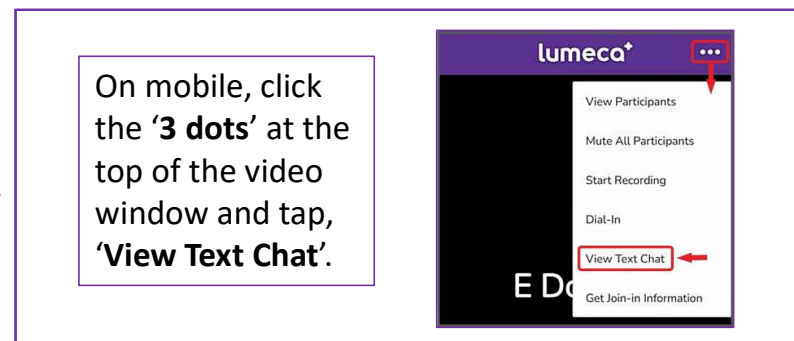Click to stop sharing your screen

Send a Chat Message

Chat messages are seen by ALL participants. This includes those in a patient consultation, who may not currently be in the video itself.

❑ Open the '**Chat**' window:

On the web, click the '**Chat**' button along the bottom of the video window.

OR

On mobile, click the '**3 dots**' at the top of the video window and tap, '**View Text Chat**'.

❑ Type your chat message, then click '**Send**'.

You may 'unsend' a message, photo, video or document by hovering over the message/file (on laptop/desk) or holding your finger on the item (on mobile) and clicking 'Unsend Message/Unsend', enter a reason and confirm.

When opening a hyperlink from '**Chat**', a warning message will appear.   By clicking '**Continue**', you will be taken to the hyperlink content in a new window.

Your video will remain open and may be accessed from the tab at the top of your screen.
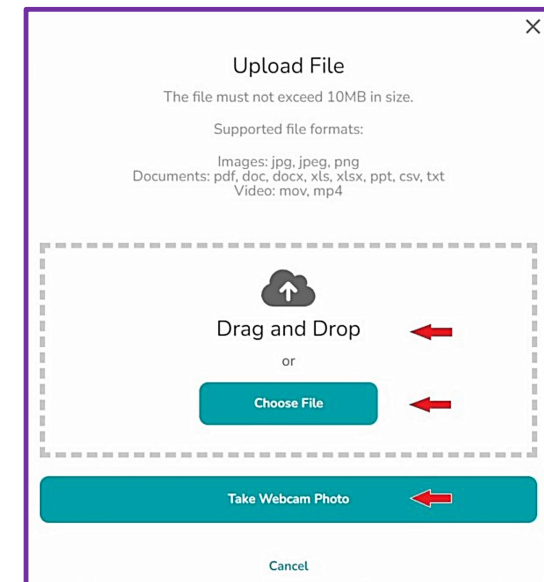
Upload a File (Photo, Video or Document)

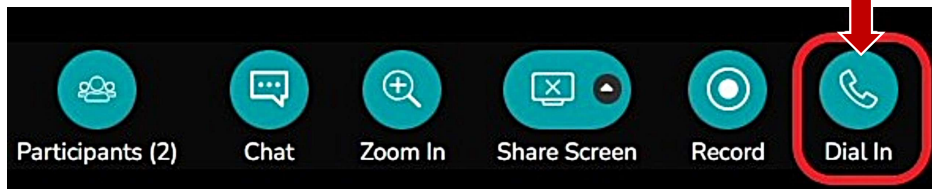**All participants within the video call can upload files into the 'Chat' window**.

❑ Open the '**Chat**' window (see instructions on previous screen).

❑ Select the camera/document icon 🖼 located beneath the 'message' box.

❑ Note the supported file formats listed, then choose one of the 3 options:
   ▪ Drag and Drop from a saved location on your device
   ▪ Choose a saved file from your device
   ▪ Take a webcam photo

Your photo, document or video will upload into the '**Chat**' window.

You may 'unsend' a message, photo, video or document by hovering over the message/file (on laptop/desk) or holding your finger on the item (on mobile) and clicking 'Unsend Message/Unsend', enter a reason and confirm.

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Dial a Participant Into
the Video Chat
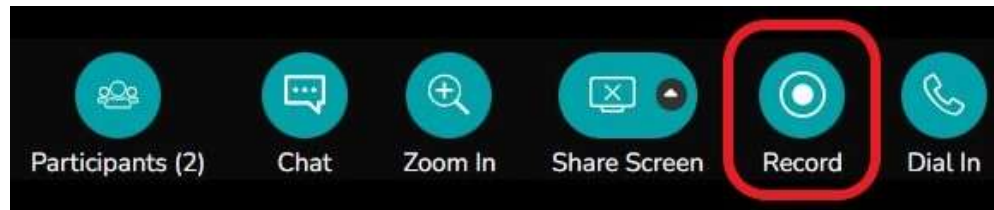

- ❑ Once in the video chat, click '**Dial In**'
- ❑ Enter the '**Participant's Display Name**' (*how their name will appear in the video chat)*
- ❑ Enter the '**Participant's Phone Number**'
- ❑ Click '**Dial In Now**'
- ▪ All participants in the video chat will hear the dialed-in person's phone ring and once they answer, will be able to hear them speak.
- ▪ If an answering machine is picked up, it will be up to the video call host to remove the participant from the call.
- ▪ Multiple people can be dialed into a video call - simply repeat the process for multiple participants.
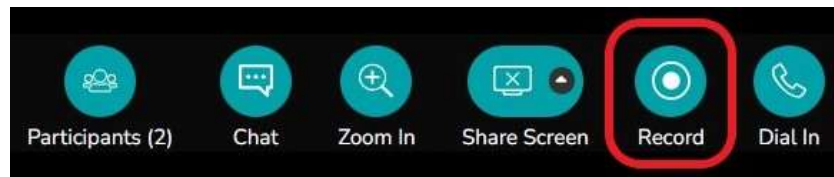
Recording a Video Call

The '**Record a Video Call**' feature is turned off by default and requires a request to be turned on.
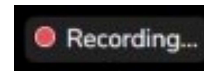
This button will not appear if the feature is disabled.

- Email us at *sales@lumeca.com*, OR

- Click this link and send us a message, *https://lumeca.com/get-in-touch/*
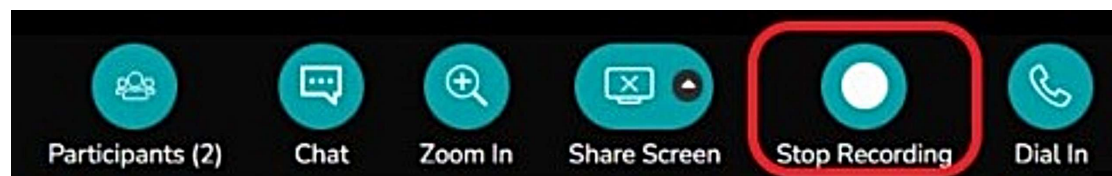
Recording a Video Call

❑ To begin recording, click '**Record'.**

A message will appear letting you know recording has begun.

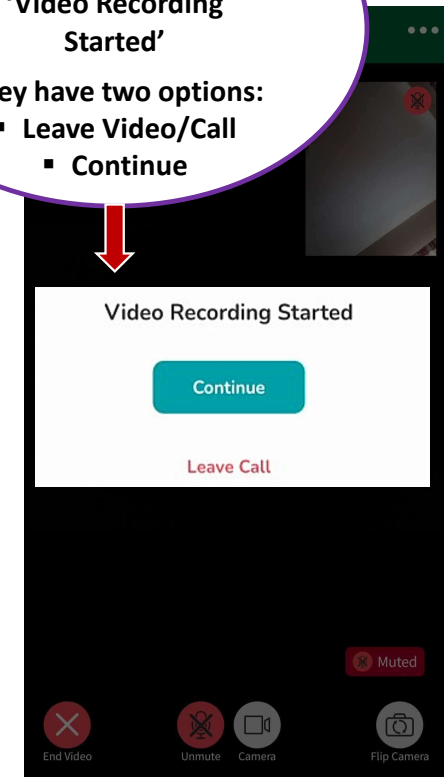❑ To end recording, click ' **Stop Record**'. A message will appear letting you know recording has stopped.

❑ When all participants leave a video meeting or consultation video call, the recording will stop automatically.

Video participants will receive notification 'Video Recording Started'

They have two options:
- **Leave Video/Call**
    - **Continue**

14. Inviting Patients

This feature is for clinics using the 'Patient Consultation' method of seeing patients.

When seeing patients via 'Meet Now' Video Meetings, a clinic does not need to invite them to join as a virtual patient, nor do these patients need to create an account.

lumeca⁺
VIRTUAL CLINIC

Patient Self Scheduling

If turned '**ON**', this allows for patients to self-schedule appointments based on a calendar that you set.

This feature is set to '**OFF**' by default. You must request it to be turned '**ON**'.

Other platform features that work along with 'Patient Self Scheduling' include:

- **Appointment Reasons** –pre-set appointment reasons that help the clinic care team prepare for the appointment.

- **Notifications for appointments created by patients** – clinic users have the option to receive notifications to the email address and/or mobile phone number set in their account profile.

**Even though self-scheduling is turned off, your patients still need to be
invited to join your virtual clinic if you are scheduling them into 'Patient Consultations'.**

Inviting Patients

This step is required when you are seeing patients via 'Patient Consultations'.

Patients do not have access to your virtual clinic without being invited, creating an account and accepting their invitation. This helps protect your clinic and also ensures your virtual clinic is not overwhelmed with unexpected patients.

❑ Select '**Clinic**' in the dashboard, then click '**Invite Patients**'.

There are 3 ways to invite patients:

1. Inviting one patient or a small batch
2. Inviting via an Invite Code
3. Importing a .CSV file

Clinic admins can invite patients on behalf of healthcare providers by following the same steps outlined on the next pages.

They must select the physician from a drop-down menu that will be visible to them.

Method 1: Inviting one Patient or a Small Batch

- ❑ Type in the patient's first and last name, and either their email address and/or mobile number (if known)

- ❑ If you have more than one patient to add during this time, click '**Invite Another Patient**' and repeat the above step.

- ❑ Click '**Invite Patient(s)** '

- ❑ Check you have selected the correct healthcare provider and clinic, then click '**Confirm and Invite**'

Method 2: Invite Code (when an email address or mobile number is not available)

❑ Follow Method 1

❑ Scroll down the page to '**Invited Patients**'

❑ Locate the invited patient; note the '**Invite Code**' and share this with the patient along with the Lumeca Health app information available from the Google Play/Apple Store and/or the web address

Method 3: Import a CSV File with a Large Group of Patients
- For PC and MAC Users Who Are Using Excel -

❑ Scroll down to '**Upload File to Invite Multiple Patients**'.

❑ If you are the clinic admin with more than one healthcare provider, '**Select the Care Provider**' from the drop-down.

❑ Select '**Click here to download CSV Template**'.

❑ Widen the columns to your preferred size. **Leave Row 1 (headings) intact**, and add patient information to the CSV file. If information is unknown, leave the field blank. The phone number should contain no dashes or parenthesis.

❑ Save the CSV template to a secure folder, by clicking '**Save As**', give it a file name (ensure the extension remains as .CSV), then '**Save**'.

❑ Click '**Import CSV**', locate the CSV file you saved and select it. The invitations to your patients will be sent and a pop-up screen will appear stating that your CSV upload sent successfully.

Note: Previously invited patients will not receive an additional invitation
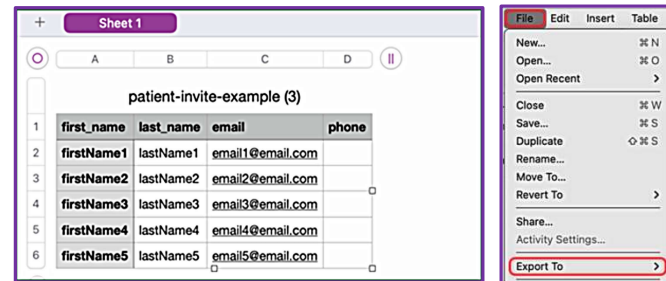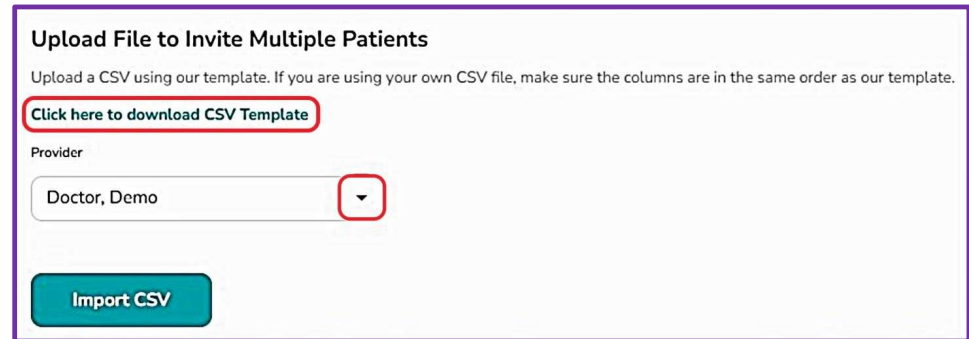
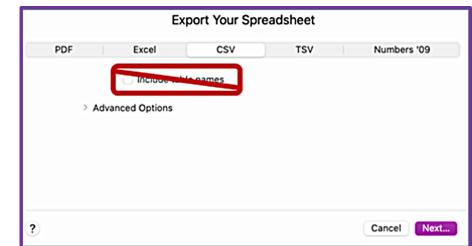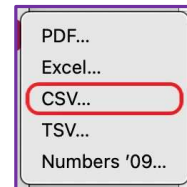# Method 3: Import a CSV File with a Large Group of Patients
- For MAC Users Without Excel Installed -

❑ Scroll down to '**Upload File to Invite Multiple Patients**'.

❑ If you are the clinic admin with more than one healthcare provider, '**Select the Care Provider'** from the drop-down.

❑ Select '**Click here to download CSV Template**'.

❑ Go to your '**Downloads**' folder and select the CSV template and '**Save**'. **Leave Row 1 (headings) intact**, and add patient information to the CSV file. If information is unknown, leave the field blank. The phone number should contain no dashes or parenthesis.

❑ Click '**Export To**', choose '**CSV**', then '**Next**'.
DO NOT click 'Include Table Names'.

❑ Give it a file name and choose the location to save it.

❑ Click '**Import CSV**', locate the CSV file you saved and select it. The invitations to your patients will be sent and a pop-up screen will appear stating success.

Note: Previously invited patients will not receive an additional invitation

Invited Patients

At the bottom of the screen, there is a list of patients who have been invited to your virtual clinic:

❑ Patient's name, phone number and email (if known at time of sending the invitation).

❑ The healthcare provider the patients were invited under.

❑ The date that the invitation was sent, as well as the date the invitation was accepted by them. Note: accepted invites do not immediately disappear from this list but remain for approximately 72 hours*.

❑ The 'Invite Code', which can be shared with patient(s) and they use to join your virtual clinic (when their email address or cell # are unknown).

❑ If this information remains under this section for an extended time, it means that the patient has not created their account and joined your virtual clinic. The invitation either must be 'Resent', or 'Removed & Resent' (if the wrong details were entered).

Invited Patients

Name	Provider	Date Invited	Date Accepted	Phone Number	Email	Invite Code	Status
Baby Girl Patient	ETest Doctor	July 25, 2023				B4QFHM	Pending
Baby Boy Patient	ETest Doctor	July 25, 2023			emarshall+baby b@lumeca.com	8TY7QT	Pending
Aaron emailtest	Dr. Nagy	June 21, 2023			emailtest.aaron @testertesttest. com	CVXX84	Error Sending

Status:

Accepted – patient has created their account and joined your virtual clinic*

Pending – still waiting for patient to join your clinic and create their account

Error Sending – the email did not reach the patient (i.e. misspelt email address)

Expired – the invitation time has expired
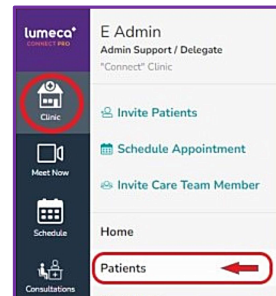
15. Searching for Patients

Patients will only appear after you have invited them to join your virtual clinic, they have accepted your invitation and created their 'Lumeca Health' account.

Patient Search

❑ Select '**Clinic**' in the dashboard, then click '**Patients**'.

❑ Either:
- Enter the patient's first name, last name or health card number, OR
- Select the correct healthcare provider from the drop-down list. Check '**Show all patients**' if you wish to see all patients who are actively part of your virtual clinic, as well as those who have been removed from your virtual clinic. If you do not check this box, you will only see all patients who are active patients of the provider you selected.

❑ Click '**Search**'.

❑ Select your patient from the list that appears.

If your patient's name does not appear after searching for them, they have either not yet accepted the invitation to join your clinic, or they still need to be invited by you.

Patient Search

You will see the following:

- **Patient Information**
- **Provider's name**
- **Upcoming Appointments**
- **Consultations Requiring Follow-Up**
- **Past Medical/Surgical History***
- **Allergies***
- **Prescription History***
- **Past Consultations**

***info must be manually entered**

The Patient Information screen will appear. You may:

- Verify the patient is associated with your clinic
- View information patient entered when they created their profile

- Schedule a **'New Consultation'**
- **'Remove Patient'** or
- If removed, '**Add Patient to Clinic**'

16. Scheduling and Canceling Patient Consultations

Clinic admins can schedule video meetings and patient consultations on behalf of the healthcare providers within their virtual clinic.
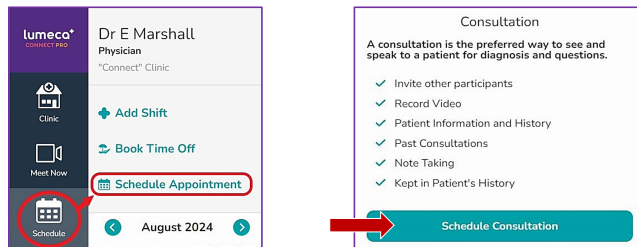.

Schedule a Patient Consultation - Step 1

There are four places within the platform from where a patient consultation can be scheduled.
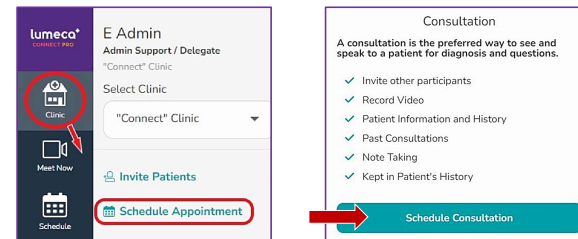In this section, we will cover doing so from the 'Schedule' tab. ★

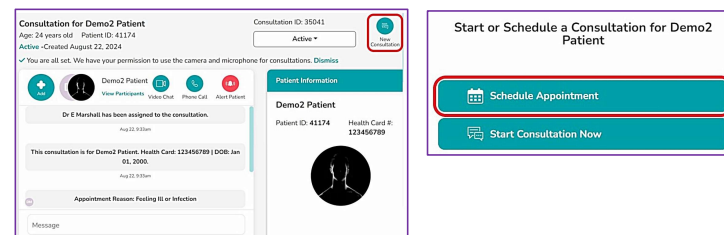|	
★ 1. The 'Schedule' tab > ▪ Select 'Schedule Appointment' > 'Schedule Consultation' 	2. The 'Clinic' tab > ▪ Select 'Schedule Appointment' > 'Schedule Consultation'
3. The 'Patients' tab > ▪ Search for the patient > click their name > tap 'New Consultation' > 'Schedule Appointment' 	4. While in an active patient consultation > ▪ Tap 'New Consultation' > 'Schedule Appointment'

Schedule a Patient Consultation - Step 2

❑ Type in the patient's health card number or first / last name (a list will start to appear)

❑ Choose the patient, then click '**Select Patient**'

‹ Back

Select Patient

Search for and select a patient to schedule an appointment for them.

Search by first name, last name, or health card number.

demo

Demo2 Patient   DOB: (January 1, 2000)

Demo1 Pt   DOB: (January 1, 2000)

1 to 2 of 2 Patients

Select Patient

Schedule a Patient Consultation - Step 3

- ❑ Clinic admins must select the healthcare provider's name from the '**Select Provider**' drop-down menu.

- ❑ Choose '**Type of Care**' (virtual or in-person) and '**Appointment Reason**' from the drop-down menus.

- ❑ If additional providers from the same virtual clinic are being invited to the patient consultation, click '**+ Invite Another Provider**'.

- ❑ Add their name from the **'Provider'** drop-down menu. If someone is added by mistake, click the red '**x**' beside their name, to remove them from the list.

- ❑ Once complete, click '**Next**'

Schedule a Patient Consultation - Step 4

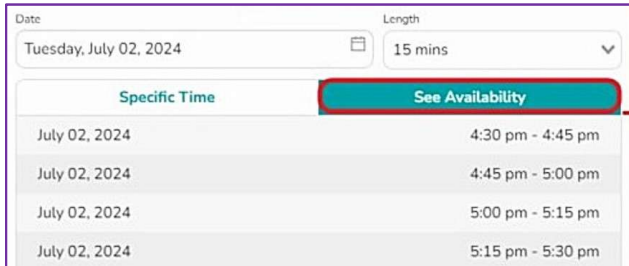- ❑ '**Date**' - Enter the date of the appointment or, if scheduling recurring appointments, the first appointment date

- ❑ '**Length**' - the length of the appointment (this is approximate; the appointment will not automatically end if it extends past this time)
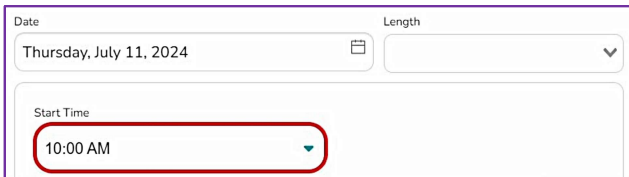
When scheduling <u>a single provider</u> and their schedule **IS NOT** entered in 'Lumeca':

- ❑ Select '**Specific Time**'
- ❑ Under '**Start Time**' select the time of day the appointment(s) will start

When scheduling <u>a single provider</u> and their schedule **IS** entered in 'Lumeca':

- ❑ Select '**See Availability**'
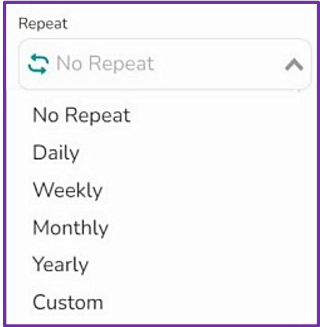- ❑ Select an available time from the list

When scheduling <u>multiple providers</u> from the same virtual clinic to join a consultation, the '**See Availability**' and '**Specific Time**' buttons <u>will not</u> appear.

- ❑ Select a '**Start Time**'.

Schedule a Patient Consultation - Step 5 - 'Repeat'

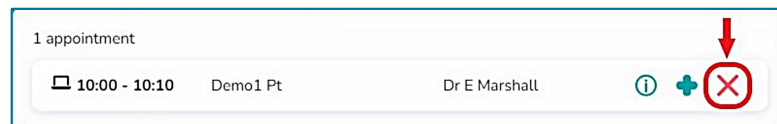|	
If scheduling a <u>one-time</u> consultation, select '**No Repeat**'.	Repeat 🔄 No Repeat ˅
If scheduling <u>recurring</u> consultations, **choose the occurrence**: ■ Daily – occurs every day, Monday thru Sunday ■ Weekly – any day of the week, Monday thru Sunday ■ Monthly – any day of the month OR the ordinal of a weekday ■ Yearly – same day every year OR the ordinal of a weekday of a month ■ Custom – every # of days (99 is max), every # weeks, every # of months	Repeat 🔄 No Repeat ˄ No Repeat Daily Weekly Monthly Yearly Custom
Under '**End Date**', select the date the last consultation is to occur. A note will indicate the appointment(s) being scheduled.	This will create 7 appointments for Team Meeting with Demo Doctor and Dr E Marshall.
If the scheduled patient consultations overlap with other appointments that a host provider or an invited provider currently have, a notification will appear to the person doing the scheduling.	⚠ **This appointment overlaps with other appointments at this time (3 max)**
Click '**Schedule Appointment**'.	**Schedule Appointment**

Cancel a Scheduled Patient Consultation

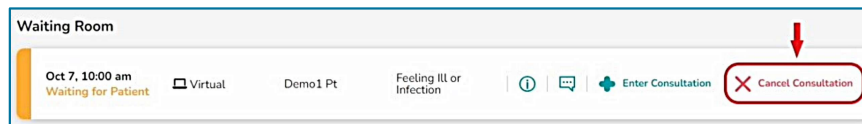Note: Scheduled appointments cannot be edited; they must
be cancelled and rescheduled.

- Log into your account as the consultation host or the clinic admin

- Go to either '**Schedule**' or '**Consultations**' in the dashboard. In the '**Schedule**' tab (in 'Week' or 'Day' view), you must click on the consultation you want to cancel.

- Select '**X – Cancel Consultation**'

- A pop-up will appear asking you to confirm. Confirm the cancellation.

- Done by the host provider or the clinic admin
- Cancels the appointment entirely and removes it from all invited providers' schedules
- All invited providers will receive a notification, based on their 'Notification Settings' (found under 'Account').
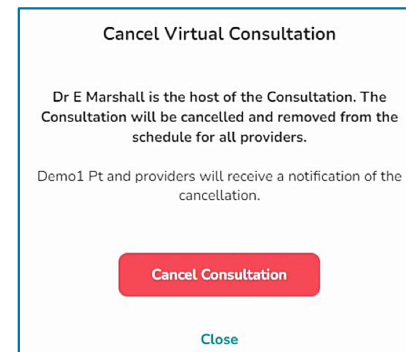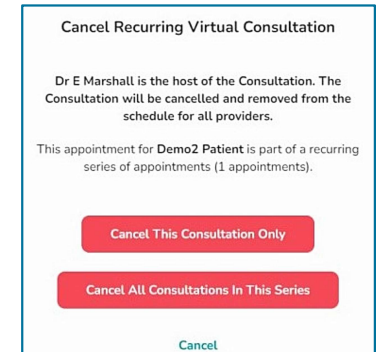
'Schedule' Tab

'Consultations' Tab

Confirm 'One-Time' Consultation

Cancel Virtual Consultation

Dr E Marshall is the host of the Consultation. The Consultation will be cancelled and removed from the schedule for all providers.

Demo1 Pt and providers will receive a notification of the cancellation.

Cancel Consultation

Close

Confirm 'Recurring' Consultation

Cancel Recurring Virtual Consultation

Dr E Marshall is the host of the Consultation. The Consultation will be cancelled and removed from the schedule for all providers.

This appointment for **Demo2 Patient** is part of a recurring series of appointments (1 appointments).

Cancel This Consultation Only
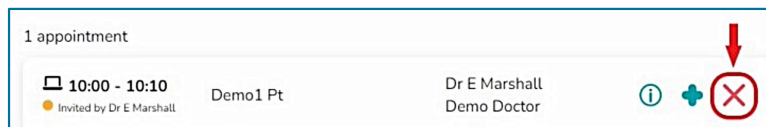
Cancel All Consultations In This Series

Cancel

Decline an Invitation to a
Scheduled Patient Consultation

❑ Log into your account as the invited clinician or the clinic admin

❑ Go to either '**Schedule**' or '**Consultations**' in the dashboard. In the '**Schedule**' tab (in 'Week' or 'Day' view), you must click on the consultation you want to decline.

❑ Select '**X – Decline Consultation**'

❑ A pop-up will appear asking you to confirm. Confirm the cancellation.

- Done by the invited provider or the clinic admin
- Removes the appointment from the invited provider's schedule only and will not change the appointment or schedules of other invited providers.
- The meeting host and office admin will receive a notification, based on their 'Notification Settings' (found under 'Account').

'Schedule' Tab

'Consultations' Tab

Confirm 'One-Time' Consultation

Confirm 'Recurring' Consultation

Patient Makes an Online Request to Cancel Their Scheduled Consultation
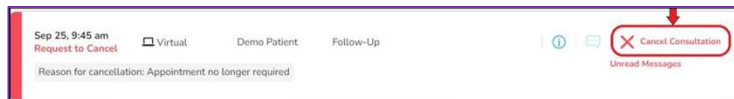
Patients may log into their 'Lumeca Health' account and make an online request to have their appointment cancelled.

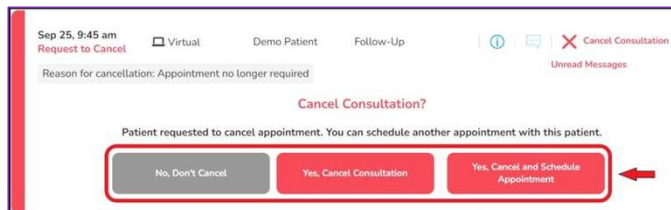Clinic users will find these requests under either...

Consultations Tab >

'Active and Pending' or 'Requests to Cancel':

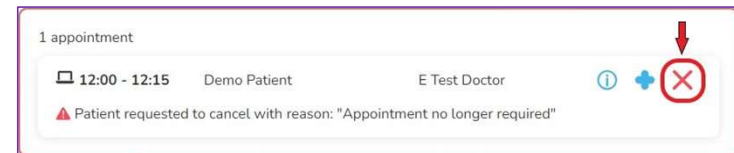❑ Locate the scheduled appointment, then click '**X Cancel Consultation**'.

❑ Select one of the three available choices:

- **No, Don't Cancel**
- **Yes, Cancel Consultation** – choosing this option will promptly cancel the appointment.
- **Yes, Cancel and Schedule Appointment** – by clicking this option, the appointment will be cancelled immediately, and you will be redirected to the '**Schedule Appointment**' screen, where you can proceed to reschedule.
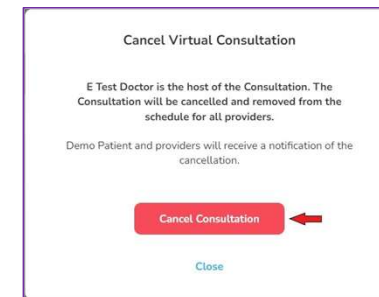

Schedule Tab >

❑ Locate the scheduled appointment, tap into it, then click the '**X**'.

❑ Click '**Cancel Consultation**' to confirm.

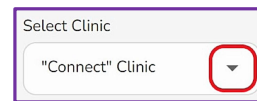A green notification will pop up, indicating that the appointment has been successfully cancelled.

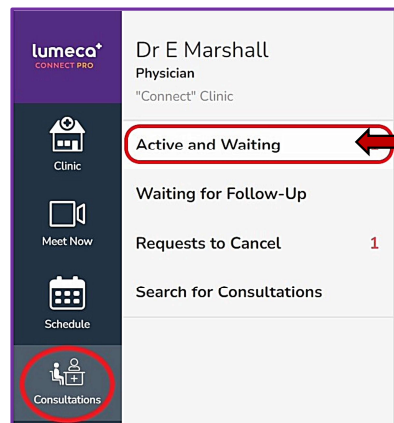# 17. Enter Scheduled Appointments

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The 'Active & Waiting' Screen

Scheduled video meetings and patient consultations can be accessed from two places in the dashboard, either the '**Schedule**' tab, or here on the **'Active & Waiting'** screen, which is designed to display a provider's schedule in booking sequence. There are a few additional features available here as well.
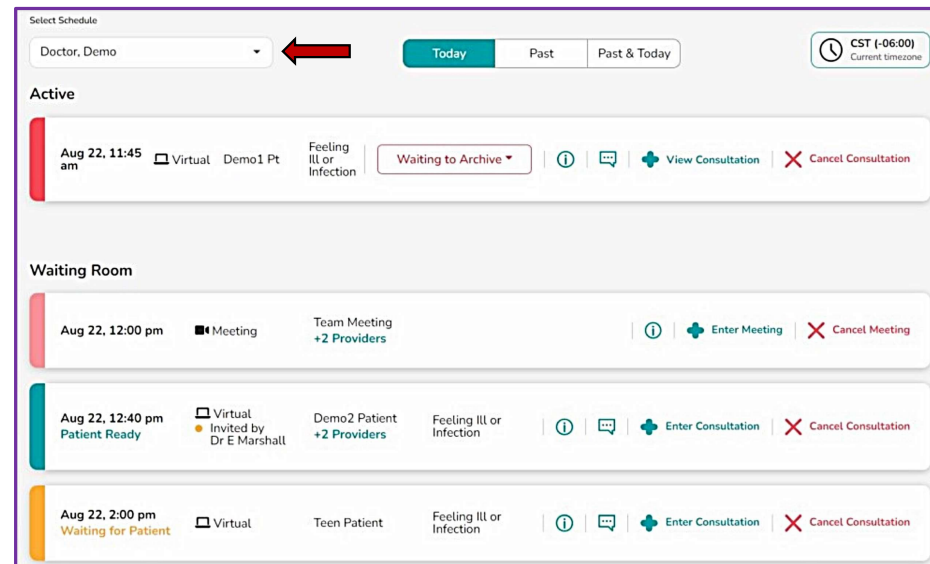
❑ If working with more than one clinic/ location, choose from the '**Select Clinic**' drop-down menu.

Select Clinic
"Connect" Clinic ▼

❑ Select '**Consultations**' in the dashboard, then click '**Active & Waiting**'

❑ Clinic admins must select the healthcare provider's name from the '**Select Schedule**' drop-down menu.

Active & Pending Screen Headings & Color Schemes

Active:
Consultations you have entered and started communicating in:
- Completed and 'Archived'
- Not yet 'Archived'
- The patient has not yet arrived or responded to you

Waiting Room:
Scheduled Patient Consultations and Meetings:
- 'Patient is Ready'
- 'Waiting for Patient'
- Scheduled Video Meeting

Active

Aug 22, 11:45 am   Virtual   Demo1 Pt   Feeling Ill or Infection

RED – 'Waiting to Archive' - completed 'Archived' consultations. There is a wait of 3 hours that these consults remain open, in the event additions need to be made. Afterwards, they may be found under 'Search for Consultations'.
Also seen here are consults entered by the healthcare provider, but not yet Archived.

Waiting Room

Aug 22, 12:00 pm   Meeting   Team M +2 Pro

PINK – scheduled 'Meet Now' Video Meetings

Aug 22, 12:40 pm   Virtual   Invited by Dr E Marshall   Demo2 Patie +2 Providers
Patient Ready

TEAL – scheduled 'Patient Consultation' - 'Patient Ready' - the patient has marked themselves as ready for their appointment.

Aug 22, 2:00 pm   Virtual   Teen Pati
Waiting for Patient

GOLD – 'Waiting for Patient' – the patient has a scheduled consultation

Active & Pending Screen Features – Page 1

Today | Past | Past & Today	Filter appointments from today, the past or both
Aug 22, 12:00 pm	Appointment Date and Time
(laptop icon) or (person icon) or (video camera icon)	Appointment Type (Virtual, In-Person or Video Meeting)
Team Meeting or Demo Patient	Name of Meeting or Patient
+2 Providers	Number of providers from the same virtual clinic invited to this appointment. Click this button to see their names. If only one provider is scheduled, this button will not appear.
Feeling Ill or Infection	Reason for patient consultation
(info icon)	Shareable Consultation or Meeting Link
(message icon)	Quick Message – present messages to send to patients (available for consults only)

Active & Pending Screen Features – Page 2

+ View Consultation	'View Consultation' under the 'Active' section – consultations the healthcare provider has entered and started, including 'Archived' and those the patient has not yet responded to or entered.
+ Enter Consultation	'Enter Meeting/Consultation' under the 'Waiting Room' section – When you initially enter the patient consultation, the patient will not realize you are there until you click '**Enter Consultation**' again at the top of the chat area. This gives you a chance to review the consult info ahead of time, as well as leave the consult and return later, when ready.
X Cancel Consultation **X Decline Meeting**	Cancel – the host provider or their admin can cancel the appointment entirely Decline – the invited provider can decline their invitation to the appointment only
Request to Cancel	Patient Request to Cancel (for patient consultations only) - after clicking 'X Cancel Consultation, there are 3 options to choose from – No, Don't Cancel; Yes, Cancel Consultation or Yes, Cancel and Schedule Appointment
Waiting to Archive ▼	Consultation Status – options include Active, Pending Imaging, Labs, Other, Referred to Specialist, Cancel Consultation, Archive Consultation, Waiting to Archive. This can be changed on this screen or within the consultation itself.

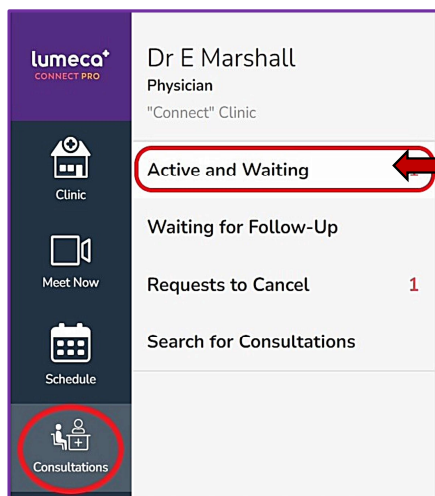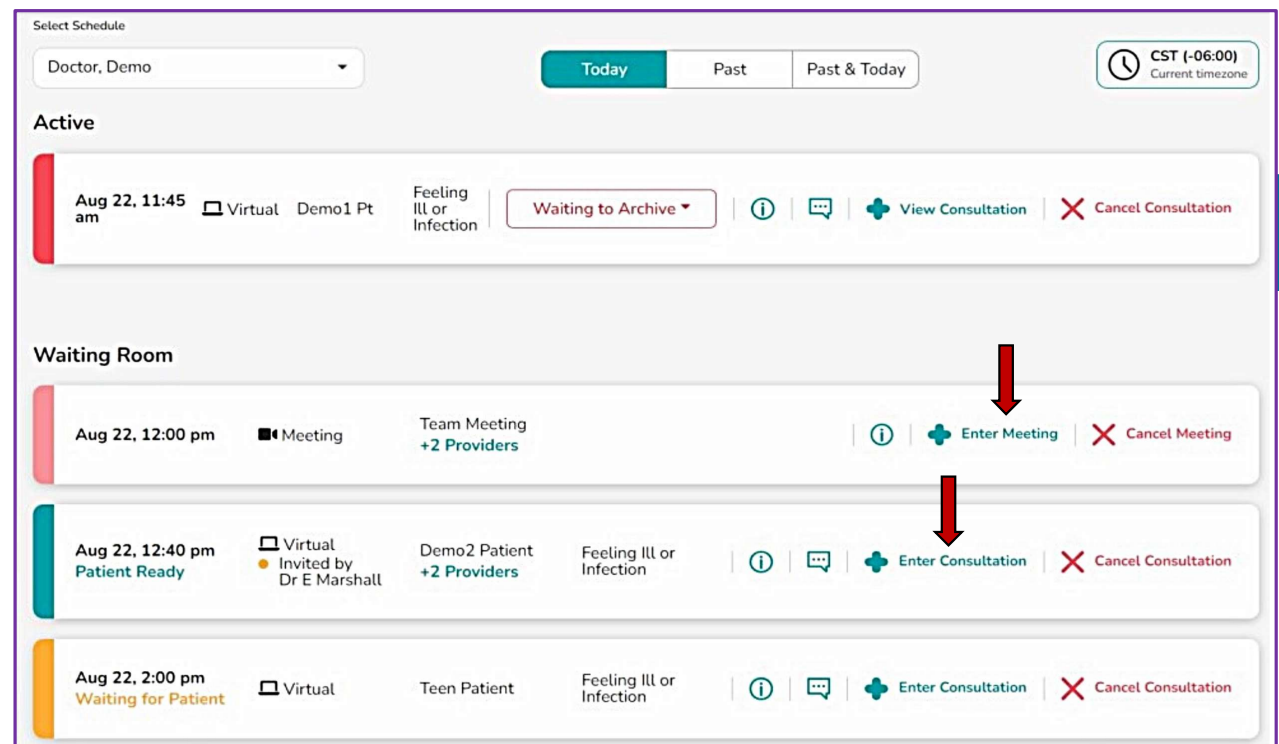# 18. Starting a Scheduled Patient Consultation or Video Meeting

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Starting a Patient Consultation or Video Meeting

❑ Click '**Consultations**' in the dashboard

❑ Select '**Active & Waiting**'

❑ Click '**Enter Consultation/Meeting**'

The Patient Consultation – Step 1

❑ When you first enter the consultation, the patient is not yet aware you have arrived. This gives you a chance to review the appointment. You can leave and re-enter as desired.

❑ Once you are ready to begin, click the '**Enter Consultation**' button. If present, the patient will see '*Dr ~~~ has entered the consultation*'.

❑ Send a **'Message'** to let them know you have arrived.

❑ **!** Click '**Alert Patient**' when patients are not responding. Send them a quick message, via SMS text or a message within the consultation itself.

The Patient Consultation Video Chat– Step 2

'Patient Information' was entered by the patient when they set up their account and can only be changed by the patient.

❑ Once yourself and the patient are ready to proceed, click '**Video Chat**'

The following options are available:
- **Video Chat** – begin the video portion of the consultation
- **Phone Call** – may be used if video chat does not work
- **Message**

Start a Video Chat in a Patient Consultation

If prompted by your laptop/desktop for camera and microphone use when entering the video chat, always 'Allow/Enable' your camera and microphone. These are permissions for your browser and this platform.

❑ With 'patient consultations' you can start and end as many video chats during the active consultation as necessary, adding and preventing participants as desired.

❑ You may prevent certain participants from joining a video chat. For example, you may wish to video with another colleague from your clinic first, before having the patient join. End that video, then start a new one with the patient. To do this you:

- Check the '**Prevent Other Consultation Participants From Joining**' checkbox, then

- Uncheck the name of the participant(s) you do not want in the video chat, and

- Check the name(s) of the participant(s) you want in the video chat.

❑ **Check** the boxes to enable your microphone, camera, and 'Remember your preferences for future meetings' for within the video chat .

❑ When ready, click '**Start Video Chat**'.

Start Video Chat

Please select who you would like to join the video chat for **Demo2 Patient**.

Patient

Demo2 Patient

Care Team

Dr E Marshall   PRIMARY

Dr. Drew

☑ Prevent Other Consultation Participants From Joining

☑ Enable microphone when the meeting starts
☑ Enable camera when the meeting starts
☑ Remember my preferences for future meetings
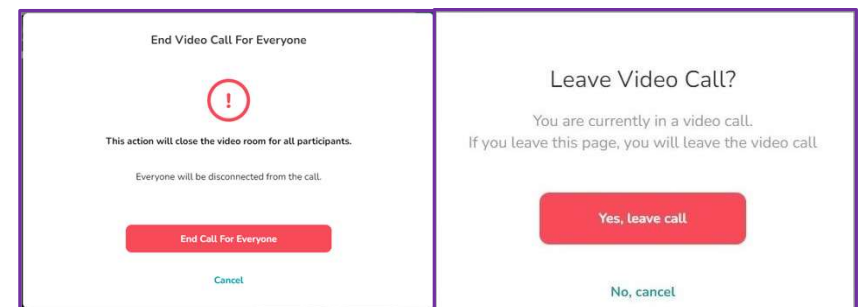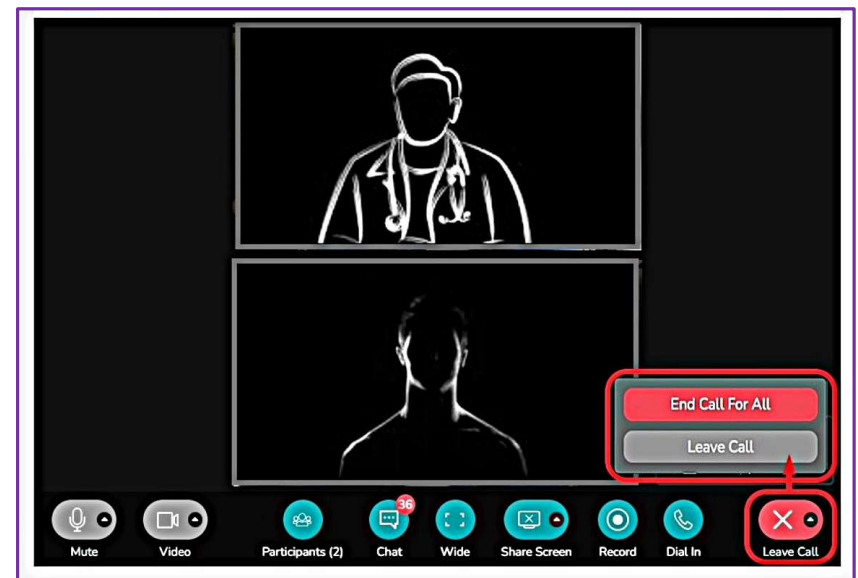
Start Video Chat

Cancel

End a Video Chat in a Patient Consultation

At the bottom-right corner of the screen, click the red '**Leave Call**' button.

The host and members of their clinic care team who are present, will see two options:

- **'End Call for All'**- will immediately end the call for the host and all other participants of the video chat. Important: if any of the host's care team members are present and click this button, they will end the call for everyone. If the host wishes to continue a video chat with their patient, they will have to start a new video chat.

- **'Leave Call'** - available to all participants in the video call - the host, patient and others. Important: as long as the host or one of the clinic care team remain in the video chat, it will remain open. All others may '**Leave Call**' and return to the video chat.

- If only the host and patient are in the call, when the host clicks either '**End Call for All**' or '**Leave Call**', the video chat will end for them both.

A message will appear on the screen asking to confirm:

- '**End Call for Everyone**' - ends the video call for all participants. In patient consultations, you can start and end as many video chats as desired during an active consultation.

- '**Yes, leave call**' – if any member of the clinic care tram remains on the video call, others can leave the video and rejoin if needed.

Archive Completed Consultations

☐ When the consultation is complete, click the '**Active**' drop-down and choose '**Archive Consultation**'.

- Once '**Archived**', consultations remain on the **'Active & Waiting'** screen for approximately 3 hours (in the event further action is needed by either the healthcare provider, the clinic admin or the patient. After that time, it may be located under '**Consultations**' > '**Search for Consultations**'.

- **Note**: unarchived consultations remain Active to both the clinic and patient and can create backlog and confusion.

19. Search for Past Sessions

Past 'Meet Now' Video Meetings

- ❑ Select '**Meet Now**' in the dashboard, then click '**Past Meetings**'
- ❑ Enter applicable search criteria
- ❑ Select '**Search**'

Selection criteria includes any (or all) of the following:

- Participant First Name or Last Name
  - Date Range
- Care Team Member (if Office Admin or Hybrid Care Team Member
- Type of Meeting (Video or Phone)

Past 'Patient Consultations'

- ☐ Select '**Consultations**' in the dashboard, then click '**Search for Consultations**'
- ☐ Enter applicable search criteria
- ☐ Select '**Search**'

Selection criteria includes any (or all) of the following:
- Consult ID
- Patient First Name, Last Name, or Health Number
- Province
- Consultation Status
- Care Team Members
- Date Range

Finding Recordings of Video Meetings / Consultations

'Meet Now' Meetings

Past Meetings can be found under:

- Meet Now > Past Meetings
- Select the meeting from the list or search for it.
- If recorded, a video recording will be available to view after approximately one hour.

Patient Consultations

Depending on whether they have been Archived or not, Past Consultations can be found under either:

- Consultations > Active & Waiting Room
- Consultations > Search for Consultations
- Open the applicable patient consultation
- If recorded, a video recording can be found within the consultation under '**View Recordings**'

20. The 'Messages' Feature.

The 'Messages' Feature

Clinical users can initiate or join messages with others. These conversations operate independently and are distinct from:

- 'Meet Now' video meetings, and
- Patient consultations

Participants must be invited to a message to join it. This may include:

- Users with registered Lumeca accounts, or
- Invited guests of your choice (typically people from outside of your organization). Invited guests must create an account and will only have access to messages they have been added to. They cannot start new messages, nor can they archive messages.

It is highly recommended that 'Message' participants turn on their account '**Notifications**' (under Account > Notifications) so they are informed when:

- They are added to a message
- They are removed from a message
- Messages they participate in are archived

Manage Guests

'**Guests**' are typically people from outside your organization whom you invite to participate in a chat message.   You may:

- ❑ **Invite Guests**
- ❑ **Archive Guests**

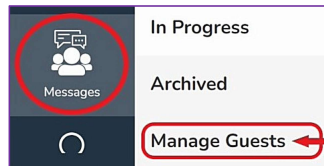- Guests must be invited by you and must create a Lumeca account as a '**Conversation Guest**'.

- They will only have access to messages they have been added to. They cannot start new messages, nor can they archive messages.

- Guests may be '**Archived**' by you. Archived guests will no longer have access to their '**Conversation Guest account**' or any conversations they had been a part of.

Invite Guests

- Click '**Messages**' on the left navigation bar, then choose '**Manage Guests**'.

- Click the '**Invite Guest**' (top-right of screen).

- Fields with an asterisk must be entered. Enter your guest's first name, last name and email address. Mobile phone # is optional.

- Click '**+Invite Another Guest**' to invite more than one person.

- When complete, click '**Invite Guest**'.

Guest Status
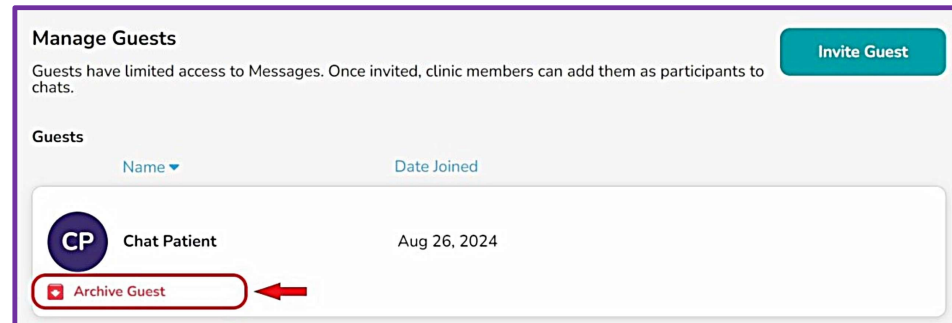
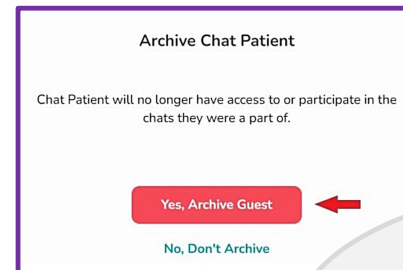| Guests	Invited Guests	Archived Guests
Those who **have accepted** their invitation to join a message and have created a Lumeca 'Guest' account. Their name will appear in your drop-down list when inviting participants to join your messages.	Those who **must still accept** their invitation and create a Lumeca account. You have options to 'Resend Invitation' or 'Cancel Invitation', if necessary.	Those archived by you. They: - **no longer have access to or can participate** in the message(s) they were part of. - **no longer appear** in your drop-down list of participants to invite to messages. You have the option to 'Unarchive' them, if desired.

Archive Guests

❑ Click '**Messages**' on the left navigation bar, then choose '**Manage Guests**'.

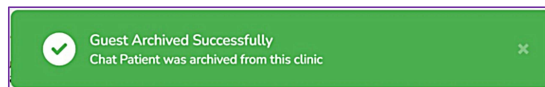❑ Locate the guest you wish to archive, then click '**Archive Guest**' beneath their name.
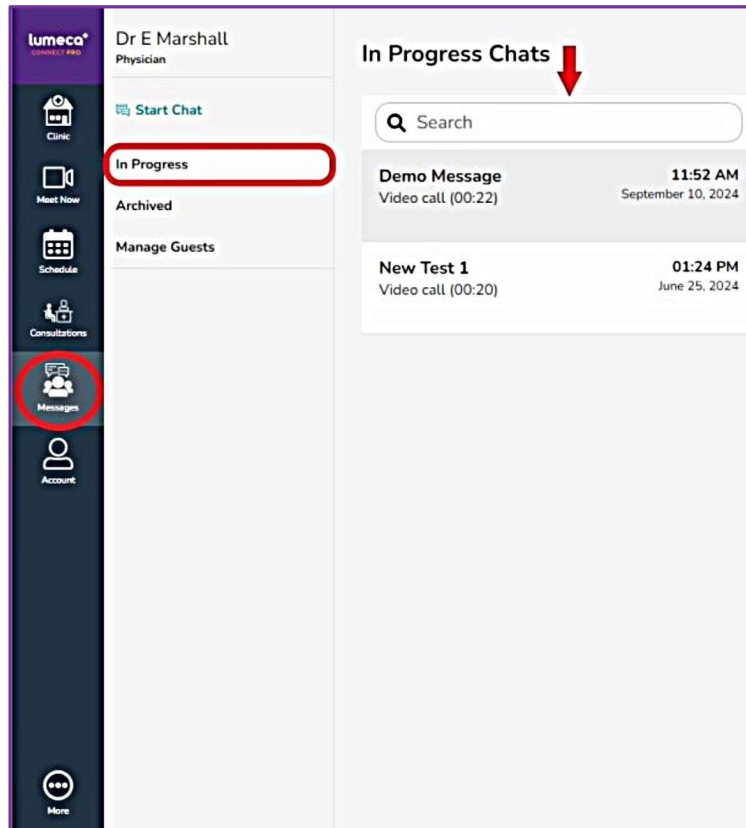
❑ Confirm by clicking '**Yes, Archive Guest**'.

❑ A green banner will confirm that your guest has been archived successfully and the guest's name will appear under '**Archived Guests**'.

Archived guests will no longer have access to their '**Conversation Guest account**' or any conversations they had been a part of.

Active Messages in Progress

- ❑ Click '**Messages**' from the left navigation bar, then choose '**In Progress**'.

  Your active messages will be listed, with the most current message at the top OR you may '**Search**' for a specific message by title, Chat ID # or participant name.

- ❑ Once located, click onto the message to enter it.

Start a New Message

❑ Click '**Messages**' on the left navigation bar, then choose '**Start Chat**'.

❑ Enter a name that helps to identify the subject of the message, then click '**Next**'.

❑ '**Add Participants**' – you may invite one or multiple participants. You may find them in a couple of ways:

- Type their name into the 'Name' field. As you start to type, suggestions will populate. You may also narrow your search by adding filters, such as 'Clinic Name', 'Location', 'Job Title' and/or 'Role', OR

- Scroll through the pages until you locate the participant(s), then check ☑ beside their name.

- Those you select will be listed beside '**Selected Participants**'. To remove a selected participant here, before starting your new message, click the '**x**' beside their name.

❑ The '**Start Chat**' button will be greyed out until you choose one or more participants to invite. When your participant list is ready, click '**Start' Chat**'. You will be directed into the message.

Features of the Message Screen

1. Name of Message

2. List of invited participants

3. '**View Participants**' button – list of invited participants, as well as 'Remove' participants button

4. '**Add Participants**' – additional participants/guests may be invited to join an active conversation

5. '**Video Chat**' – participants can start a video chat at any time

6. '**Archive**' – end and close the message. Note: only the message creator may archive a message or photo file

7. '**Files**' – attach photos, videos or documents to the message

8. '**Download Transcript**' –

9. Message chat window – where the conversation appears

10. '**Message**' – where participants type their chat message, then hit 'Send'

11. '**Send**' – click to send a chat message

12. [icon] - click this icon to upload a document, video or photo file

Add Additional Participants to an Active Message

When in your active message, click 'Add Participant'

❑ 'Add Participants' – you may invite one or multiple participants. You may find them in a couple of ways:

- ▪ Type their name into the 'Name' field. As you start to type, suggestions will populate. You may also narrow your search by adding filters, such as 'Clinic Name', 'Location', 'Job Title' and/or 'Role', OR

- ▪ Scroll through the pages until you locate the participant(s), then check ☑ beside their name.

- ▪ Those you select will be listed beside 'Selected Participants'. To remove a selected participant here, before starting your new message, click the 'x' beside their name.

❑ The 'Add Participants' button will be greyed out until you choose one or more participants to invite. When your participant list is ready, click 'Add Participants'. You will return to the message.

Remove a Participant from a Message

There are two areas you can remove a participant:

From the 'Add Participants' screen when starting a new message or when in an active message	From the 'View Participants' button in an active message
On the 'Add Participants' screen, participants you select will be listed beside 'Selected Participants' 	In your active message, click 'View Participants'
To remove a selected participant, click the 'x' beside their name 	Tap 'Remove' beside the name of the participant you wish to remove

The participant will no longer have access or be able to participate in this message

Chat Messages

Send a chat message: ❑ Type into the '**Message**' field, then click '**Send**'	
Unsend a chat message: ❑ Hover over a message that you have sent and tap '**Unsend Message**'. ❑ Add a '**Reason**', then confirm by clicking '**Unsend Message**'. The message will be replaced in the chat window with the words, '**Message Unsent**'.	
Resend a chat message: ❑ Hover over a message that you have hidden and tap '**Show Message**'. ❑ Confirm by clicking '**Resend Message**'. All participants will be able to see the message again in its original location.	

Upload Photos, Documents & Videos

UPLOAD A PHOTO, DOCUMENT OR VIDEO

❑ Select the camera/document icon 🖼 located beneath the '**Message**' field.

❑ Use one of the three options available to upload a file. Ensure you are uploading one of the supported file formats listed - **!** If you attempt to upload an unsupported file format, you will get the message 'The file format is not supported'.

❑ You will see a preview of the file you are uploading - either the photo or the document/video name. When ready, click '**Send**' and your file will appear in the message window. All participants will see your photo/file.

Feature of Lumeca 'GO' Clinics only: If you have '**Blur photos in chat**' checked **ON** under '**Account > Settings**', all uploaded photos will appear blurred. To unblur, click '**Unblur Photo**'. Blur the image again by clicking '**Blur Photo**'.

Uploaded Documents or Videos

The file name will appear in your message area and under '**Files**'. Participants will have to do download it to their device before it can be reviewed.

Unsend/Re-send a File

Uploaded files may be unsent or re-sent.

Refer to the previous 'Chat Messages' slide for instructions.

Download a File

- Click on the file name in the Chat message box, or

- Under '**Files**', click on the [...] next to a file name, then '**Download**' an individual file, or

- Under '**Files**', choose '**Download All**' to download multiple attached files. The files will be compressed into a .zip file containing the multiple files, which will need to be '**Extracted**'.

Start a Video Call While in a Message

- ❑ When in an active message, click '**Video Chat**'.
- ❑ Check to enable your microphone and camera and to remember your preferences for future video chats. These permissions grant camera and microphone access within the video itself.
- ❑ When ready, click '**Start Video Chat**'.

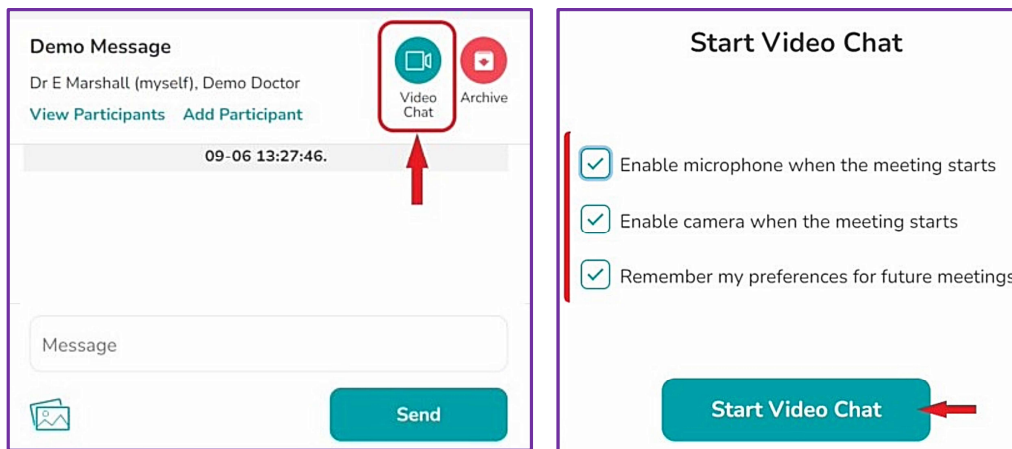You will be taken directly into the video chat to wait for participants to arrive.

Participants will be prompted to enter the video call.

On the '**Video Call Request**' screen, they will click '**Yes, Accept Call**' and will enter the video.

End/Leave a Video Call While in a Message

❑ Click the red button labelled '**Leave Call**' on the bottom of your screen.

There are two options available for the message host and one option for all other participants:

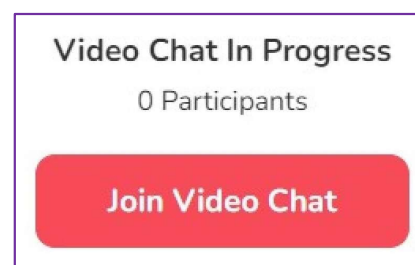❑ **End Call for All - Available to message host only** - the video will be ended for all participants, and they will return back to the message

❑ **Leave Call** - **Available to all message participants** - anyone may leave and return to the active video chat at any time

If there are still participants in the video call, anyone who leaves the video chat will see the message, '**Video Chat in Progress**'. This message remains visible, and the video will remain active until the message host ends the call.

Participants may re-join the active video by clicking, '**Join Video Chat**'.
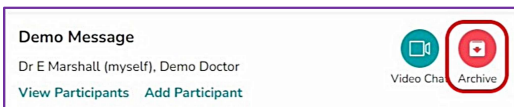
Archive, Find Archived & Unarchive Messages

Note: only the Message host may archive or unarchive message chats.

ARCHIVE A MESSAGE

❑ When an active message is complete, enter the message and click the red '**Archive**' button.

❑ Click '**Yes, Archive Chat**' to confirm.

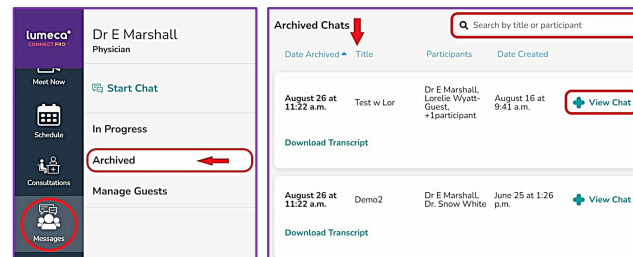A green banner will appear at the top of your screen confirming that the message has been archived.

The message will move from '**In Progress**' to '**Archived**' (under the '**Messages**' tab).

FIND ARCHIVED MESSAGES

❑ From the left navigation bar, click '**Messages**', then choose '**Archived**'.

Your archived messages will be listed, with the most recently archived message at the top OR you may '**Search**' for a specific archived message by title participant name.
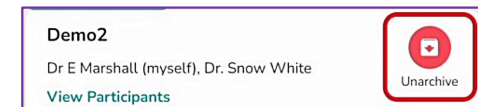
When archived, changes cannot be made to a message however, files uploaded within the message may be accessed.
• The message may be unarchived and become active once again, if required.

UNARCHIVE A MESSAGE

❑ Find the message you wish to unarchive. Click '**+View Chat**' to enter it.

❑ After entering the message, click the '**Unarchive**' button.

❑ Click '**Yes, Unarchive Message**' to confirm.

The message will now be active and accessible by all participants.

21. Provider Support

Monday to Friday – 8:00 AM to 5:00 PM Sask
Monday to Friday – 5:00 PM to 10:00 PM Sask – Limited
Saturday, Sunday & Holidays – 8:00 AM to 10 PM Sask - Limited

PHONE:
1-856-369-4641

EMAIL:
support@lumeca.Zendesk.com

WEBSITE:
https://lumeca.zendesk.com

22. Citizen Support

Monday to Friday – 8:00 AM to 4:30 PM Sask
Monday to Friday – 4:30 PM to 10:00 PM Sask – Limited
Saturday, Sunday & Holidays – 8:00 AM to 10 PM Sask - Limited

PHONE:
1-856-369-4641

EMAIL:
support@lumeca.Zendesk.com

WEBSITE:
https://lumeca.zendesk.com