



Provider User Guide

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lumeca+



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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'


You have been invited to join via the Lumeca App.

Get Started 

Please [click this link](#) to join .

After you accept your invite, you will be able to provide services in Lumeca for .

- **Scheduling:** Care provider schedules are set when they are accepting consultations virtually, physically, or both, as well as the time interval in which they wish to allocate for each patient. Patients can then book appointments on-line with a care provider's schedule.
- **Patients:** Invite patients by sending them a link through email and/or text message. If you don't have this information, you can give them a unique code. Patients use this link or code to be added to your clinic.
- **Connect:** Work from wherever you would like, and connect with patients by video, or phone consultations. Experience an increased level of efficiency virtual healthcare has been proven to provide. Extend the reach of healthcare to patients who might not have easy access to a clinic.

Note 

The link above is a one time registration link and will not work after you complete registration. If you'd like to get back to the website, go to [the login page](#). We recommend bookmarking this page for future reference.

Need Assistance?

If you have any questions or concerns, feel free to contact your Lumeca representative or email info@lumeca.com for support.

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 first 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.

lumeca+ Clinic

You Have Been Invited to Join a Clinic.

Do you have an account?

If you are the creator of this clinic and have not signed up for an account yet, please select "I Don't Have an Account."

I Have an Account

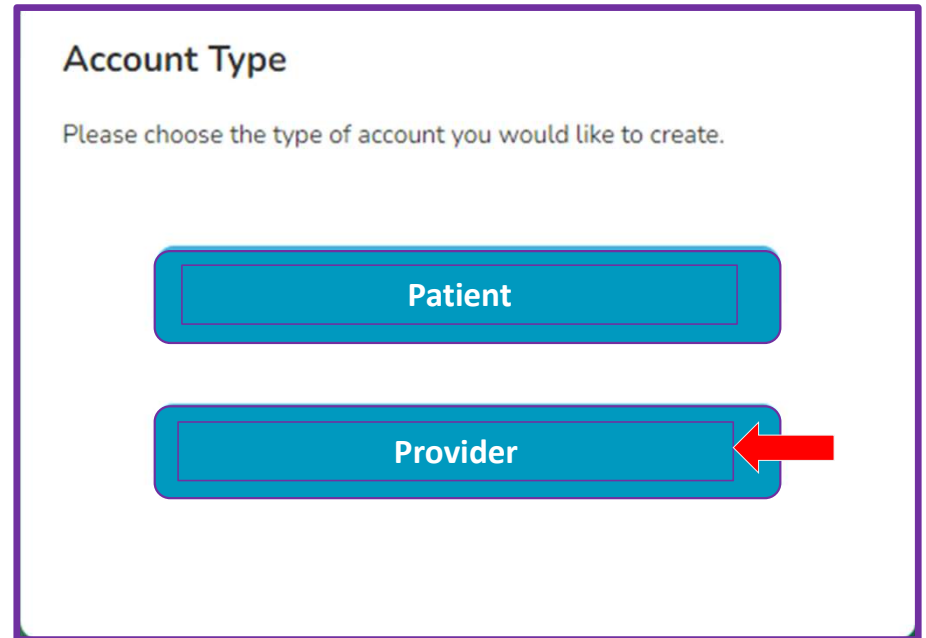
I Don't Have an Account

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.

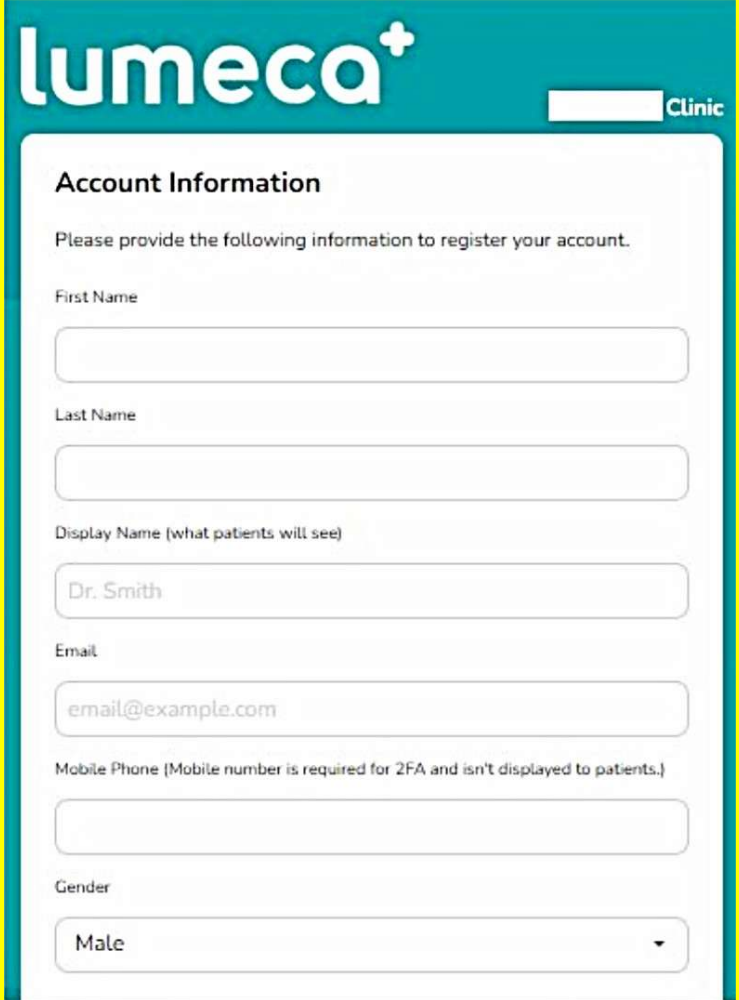
Patient

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.*



The screenshot shows the 'lumeca+' logo at the top left and a 'Clinic' label with a dropdown arrow at the top right. The form is titled 'Account Information' and includes the instruction: 'Please provide the following information to register your account.' The form fields are: 'First Name' (empty), 'Last Name' (empty), 'Display Name (what patients will see)' (containing 'Dr. Smith'), 'Email' (containing 'email@example.com'), 'Mobile Phone (Mobile number is required for 2FA and isn't displayed to patients.)' (empty), and 'Gender' (a dropdown menu currently showing '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'

Choose a Password

Password

Confirm Password

☒ I have read and agree to the End User License Agreement and Privacy Policy

☒ I have read and agree to the Consent Form

Continue

Password Requirements

- ☐ At least 8 characters
- ☐ At least 1 capital letter
- ☐ At least 1 lowercase letter
- ☐ At least 1 number
- ☐ At least 1 symbol (*, %, !, etc...)
- ☐ Confirmation password matches

YOU ARE NOW READY TO ACCESS YOUR CLINIC !

☐ Click 'Go To Your Clinic'

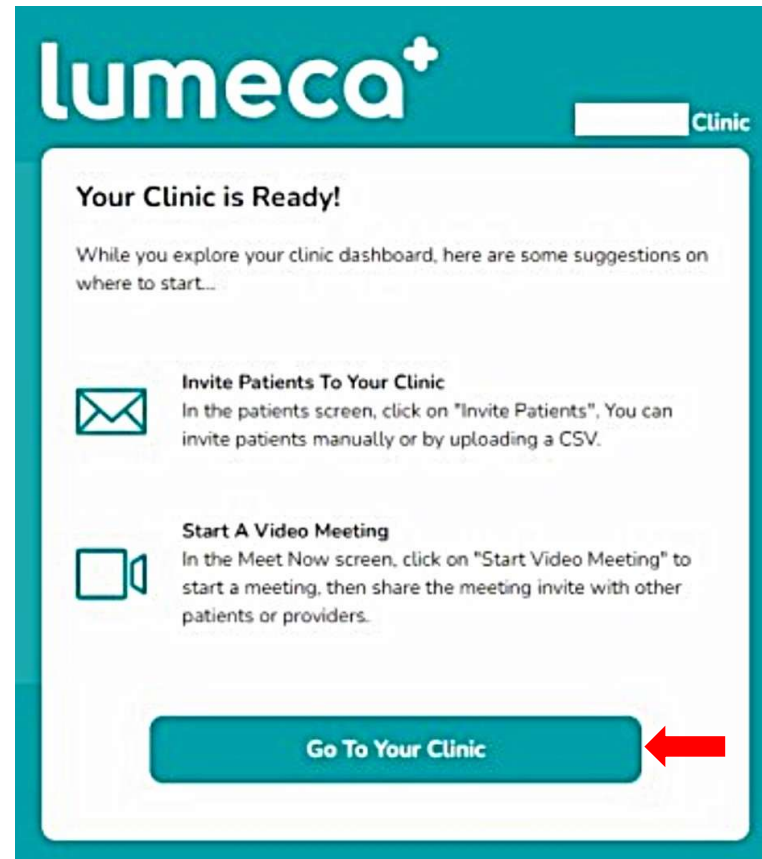
Note:

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.

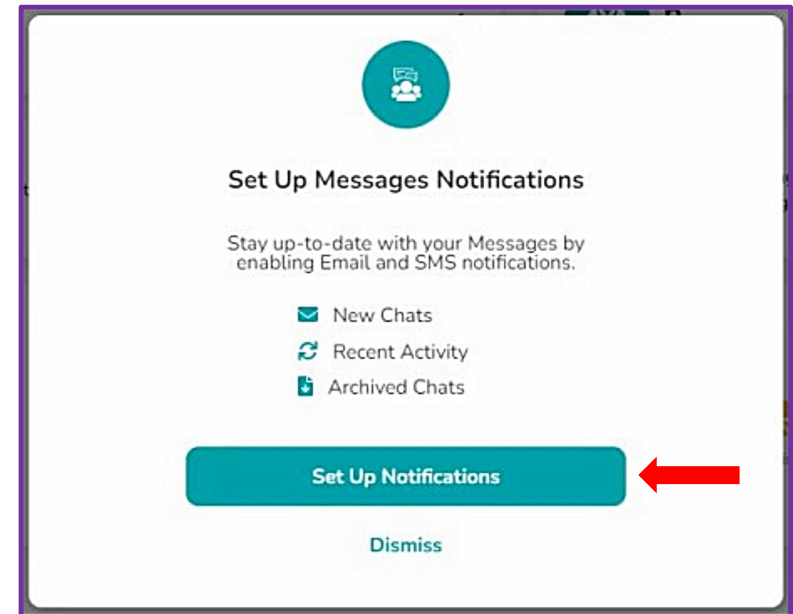
It is recommended you enable your Email and SMS text notifications, so you are informed when:

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

☐ Click '**Set Up Notifications**'

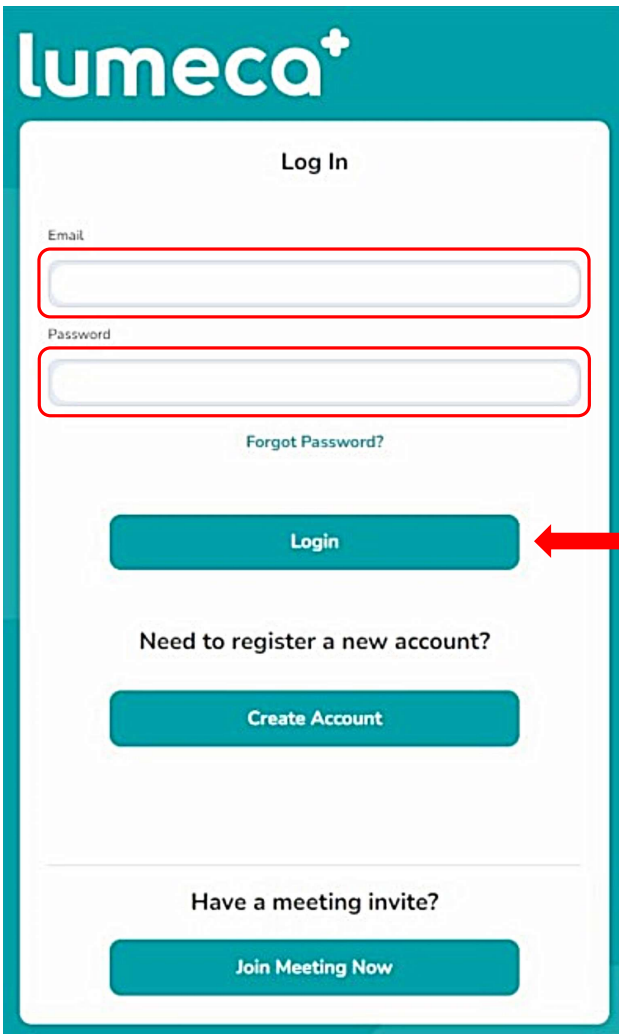
You will see the email address and mobile number where your notifications will be sent (pulled from your account information). You may set email and/or SMS text notifications for:

- 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)



3. Account Login & Logout





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Log In

Email

Password

[Forgot Password?](#)

Login

Need to register a new account?

Create Account

Have a meeting invite?

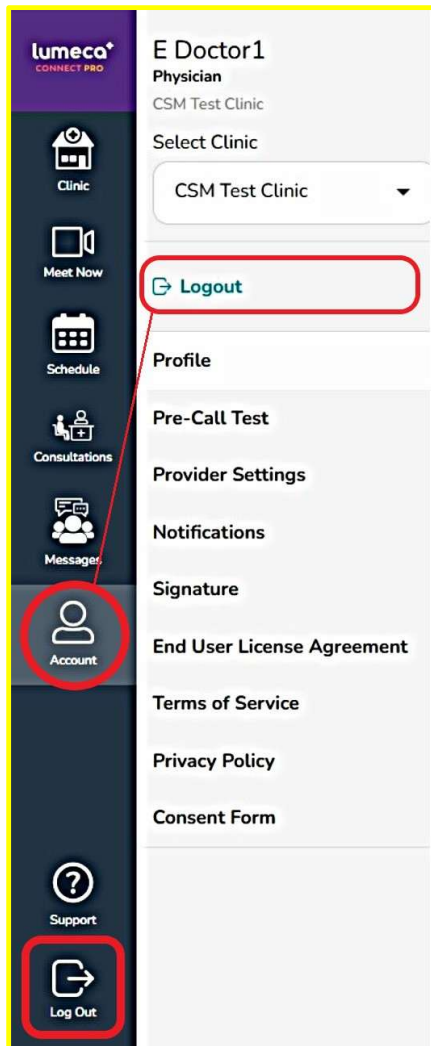
Join Meeting Now

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

The logo for lumeca+ VIRTUAL CLINIC is displayed on a dark purple rectangular background. The word "lumeca+" is in a white, lowercase, sans-serif font, with a small white plus sign. Below it, the words "VIRTUAL CLINIC" are in a smaller, uppercase, sans-serif font, colored in a light blue. To the right of the purple rectangle is a vertical teal bar, and above its top portion is a teal L-shaped graphic element.

lumeca⁺
VIRTUAL CLINIC

HOME SCREEN

lumeca
CONNECT PRO

E Doctor1
Physician
CSM Test Clinic

Select Clinic
CSM Test Clinic

Meet Now
Schedule
Consultations
Patients
Care Team
Appointment Reasons
Clinic Settings
Reports
Consultation Feedback
Support
Log Out

Home

0
My Active Consultations

3
My Patients

6
Clinic Staff

Meet Now
Start a Video or Phone Meeting - Meet with patients, participants and other care providers over video or phone.

Join a Meeting
Enter a meeting id and a passcode to join a meeting.

Scheduled Appointments
Today Tomorrow
There's no scheduled time for Today There's no scheduled time for Tomorrow
View Waiting Room

Past Appointments
Last 7 Days
There's

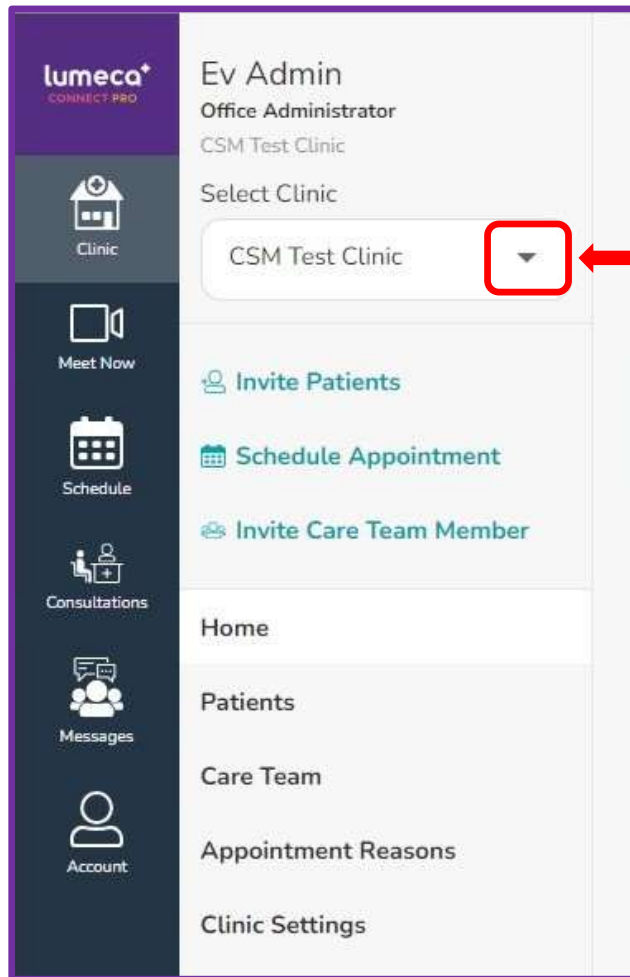
The Home screen provides condensed information about your clinic, which is populated from other areas in the platform. You cannot change info here. Click on any box that contains an arrow to be directed to the section.

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

5. Select a Clinic

The logo for lumeca+ VIRTUAL CLINIC is displayed on a dark purple rectangular background. The word "lumeca+" is in a white, lowercase, sans-serif font, with a small white plus sign to the upper right of the 'a'. Below it, the words "VIRTUAL CLINIC" are in a smaller, teal, uppercase, sans-serif font. To the right of the purple rectangle is a vertical teal bar, and above its top portion is a teal L-shaped graphic element.

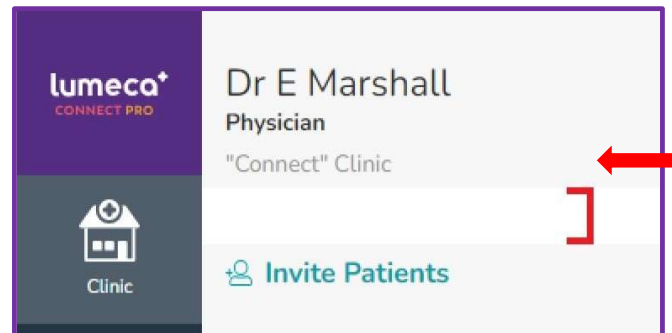
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VIRTUAL CLINIC



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

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CONNECT PRO

E Doctor1
Physician
CSM Test Clinic

Select Clinic
CSM Test Clinic

Logout

Profile

Pre-Call Test

Provider Settings

Notifications

Signature

End User License Agreement

E Doctor1
Change Profile Picture

Change Email Change Password

Account Information

Display Information
Display Name (Displayed to patients)
E Doctor1

Address
Province
Saskatchewan

Contact Information
Email
First Name
E
Last Name
Doctor1
Mobile Phone (Used for Two-Factor authentication.)

Age and Gender
Gender
Female

Save Changes Discard Changes

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

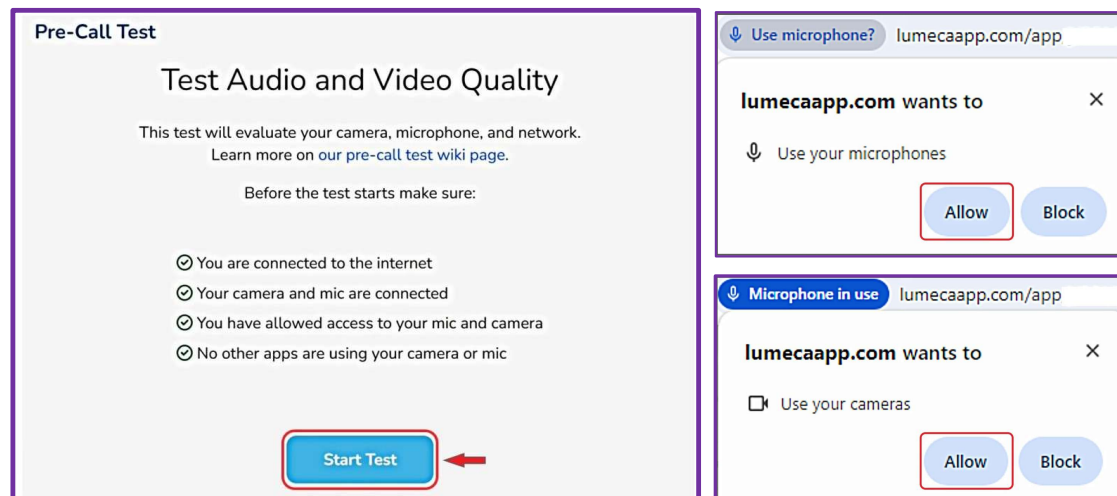
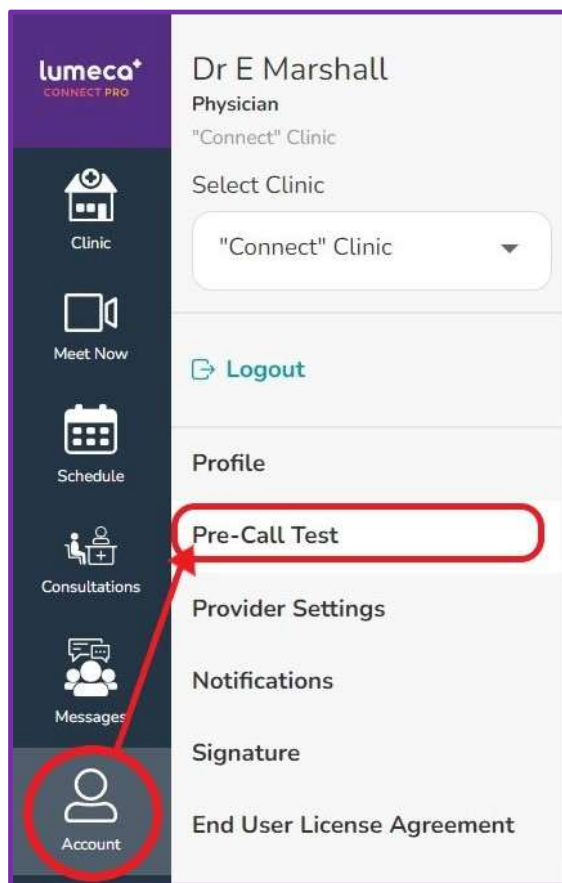
❑ If changes/additions are made, click 'Save Changes'.

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	↑ Outgoing bitrate: 3274 kbps
✓ Camera detected	↑ Average bitrate: 2067 kbps
✓ Test video room created	↔ Average round trip: 0.07 secs
✓ Camera started	↔ Max round trip: 0.08 secs
✓ Call Quality Result: Good	📶 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

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VIRTUAL CLINIC

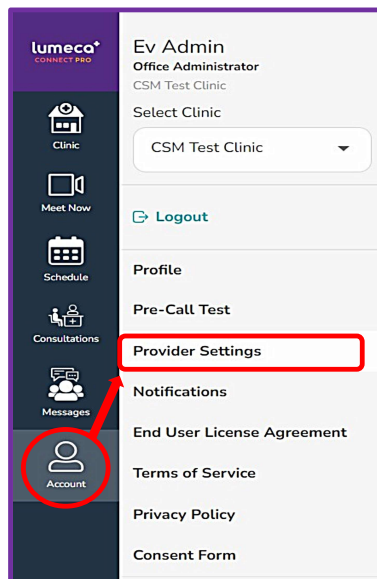
PROVIDER SETTINGS

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 Booking

Lead Time

The minimum amount of time before an appointment occurs that a patient can make a booking.

5 minutes before

Patient Provider Selection

☒ Allow patients to select another provider at my clinic.

Select other Providers that your patients may select.

Select All

☐ Dr. Getlar

☒ Dr. Bouffay

☐ Dr. Strange

☐ Dr. Reid

☐ Dr. Ruffo Connect

Patients

New Patients

☒ I am not accepting new patients at this time.

☐ I am accepting new patients.

You currently have 0 patients. Stop accepting new patients once I reach

10

APPOINTMENT NOTIFICATIONS

- Notifications to Clinic Care Team Members -

Notifications are applied on a per clinic user basis.

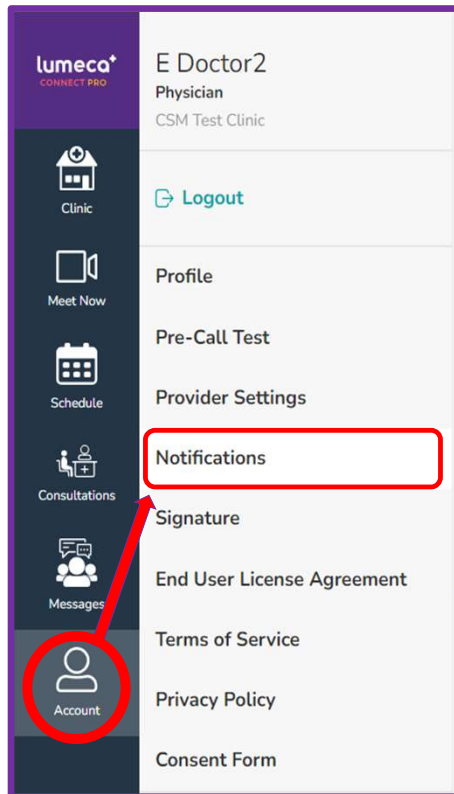
Each care team member must set their own appointment notifications.

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	 Appointments	 Messages
<i>If Enabled</i>	<i>Patient Consultations</i>	<i>If Enabled</i>

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**'.

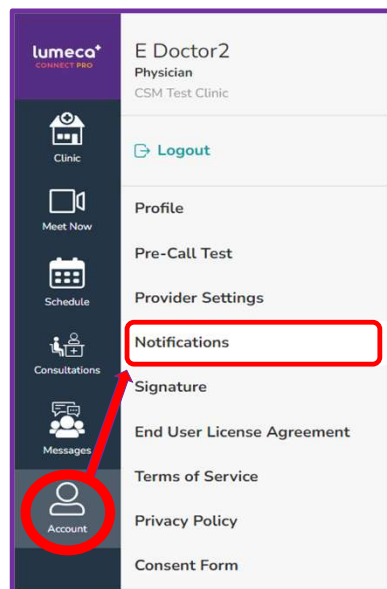
Set up Email & SMS Text Message Notifications

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

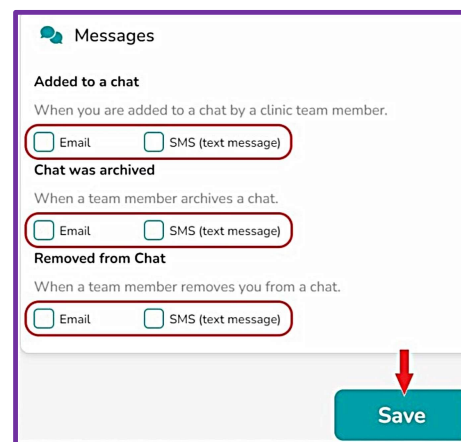
- When you are added to a message
- When a message you are a part of is archived by the message host
- When you are removed from a message

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'**.

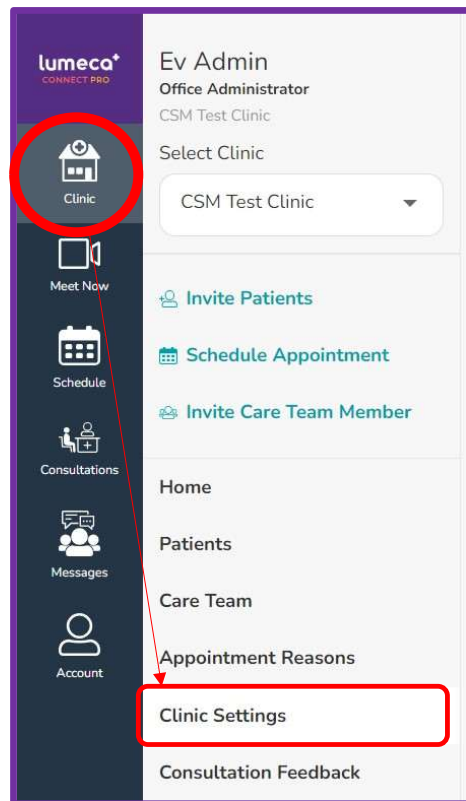


CLINIC SETTINGS

- Appointment Notifications & Reminders to Patients/Participants -

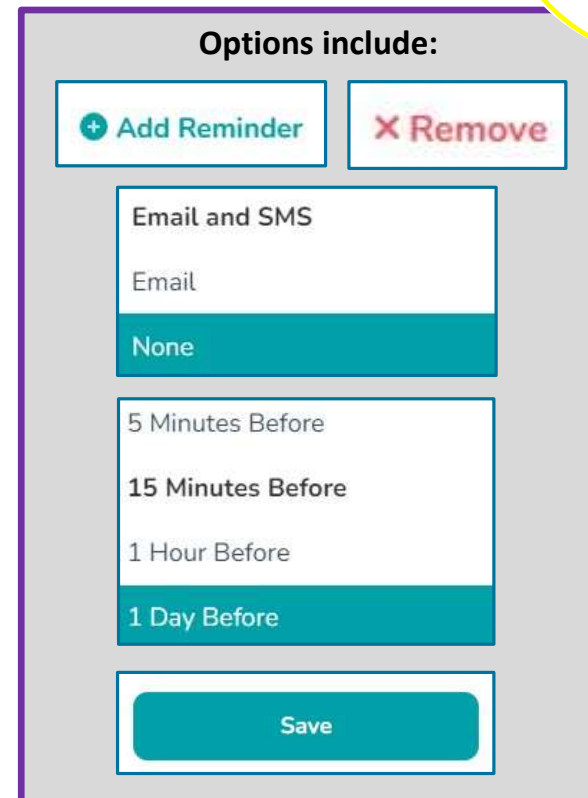
It is highly recommended that you send patients/ participants appointment reminders for their scheduled patient consultations, via email and/or SMS text message.

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



CLINIC SETTINGS

- Quick Messages to Patients/Participants -

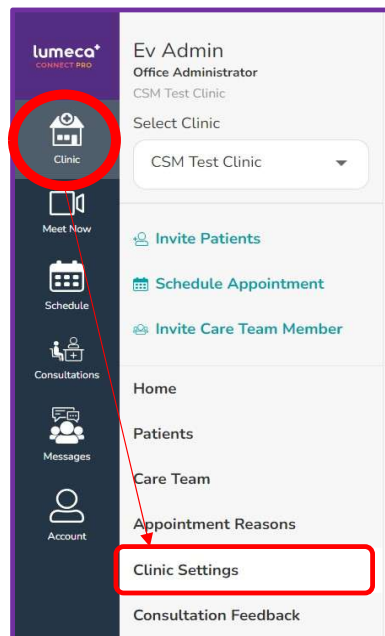
Quick Messages help healthcare providers, or their clinic admin manage 'patient consultations' by sending a message to patients before the consultation begins. Note: they do not work for 'Meet Now' virtual meetings.

They are accessed from the 'Active & Waiting' screen, however, are overseen here under '**Clinic Settings**'.

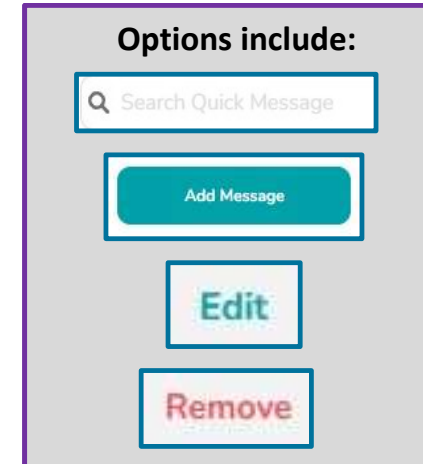
Patients receive these messages within the consultation itself as a chat message.

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.



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**'

The screenshot shows the 'Add Quick Message' interface. At the top is a teal 'Add Message' button. Below it is a 'Provider' dropdown menu with 'Providers' selected and a red square icon to its right. The dropdown list is open, showing 'All' (highlighted in teal), 'Doctor, Lorelie', 'Doctor1, E', 'Doctor2, E', and 'Gellar, Ross'. Below the provider selection is the 'Add Quick Message' form. It contains a text area with the message: '{Provider Display Name} has been called away for an emergency. Please call the clinic to reschedule your appointment.' A red circle highlights the '{Provider Display Name}' variable, and a red arrow points to a teal button labeled 'Insert Provider's Display Name Variable' below the text area. At the bottom of the form are two buttons: 'Add Quick Message' (teal) and 'Cancel' (light blue). A red arrow points to the 'Add Quick Message' button.

9. Appointment Reasons

The logo for lumeca+ VIRTUAL CLINIC is displayed on a purple rectangular background. The word "lumeca" is in white lowercase letters, followed by a white plus sign. Below it, the words "VIRTUAL CLINIC" are in teal uppercase letters. To the right of the purple box is a teal vertical bar, and above it is a teal horizontal bar, forming an L-shape.

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VIRTUAL CLINIC

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**'.

Clinic

Meet Now

Schedule

Consultations

Messages

Account

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 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

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

10. Managing Healthcare Provider's Schedule & Calendar

The logo for lumeca+ VIRTUAL CLINIC is displayed on a dark purple rectangular background. The word "lumeca" is in a white, lowercase, sans-serif font, followed by a white plus sign. Below this, the words "VIRTUAL CLINIC" are written in a smaller, teal, uppercase, sans-serif font. To the right of the purple rectangle is a vertical teal bar, and above it is a teal L-shaped graphic element.

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VIRTUAL CLINIC

MANAGING SCHEDULES

Your clinic's regular EMR system should be used however, a provider's schedule MAY 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:

- Click on an individual day or 'Today'.
- Click on 'This Week'
- Hover over a day to see the number of appointments scheduled.

DAY View:

- 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.

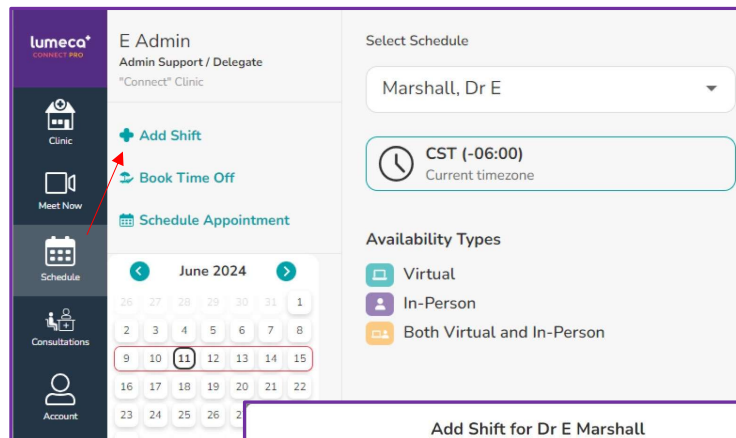
WEEK View:

- 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.

The screenshot displays the lumeco CONNECT PRO interface. On the left, a sidebar contains navigation icons: Home, Clinic, Meet Now, Schedule (highlighted with a red circle), Consultations, Messages, Account, Support, and Log Out. The main content area is divided into sections for user information (E Admin, Office Administrator, CSM Test Clinic), clinic selection (CSM Test Clinic), and schedule configuration (Select Schedule: Doctor1, E; CST (-06:00) Current timezone; Availability Types: Virtual, In-Person, Both Virtual and In-Person). A calendar for December 2024 is shown, with the 'Today' button highlighted. Below the calendar, a 'Day' view is selected, showing a grid of appointments. A red box highlights the 'Day' and 'Week' view buttons. A red box also highlights the 'View' button in the top right corner. A red box highlights the 'Normal' option in the 'View' dropdown menu. A red box highlights the 'Team Update Meeting' appointment on Friday, December 29th, which is scheduled from 13:15 to 13:45. The appointment details show it is for E Doctor1 and E Doctor2. A red box highlights the appointment details, including the time, title, and doctors. A red box highlights the 'View' button in the top right corner of the appointment details. A red box highlights the 'Normal' option in the 'View' dropdown menu.

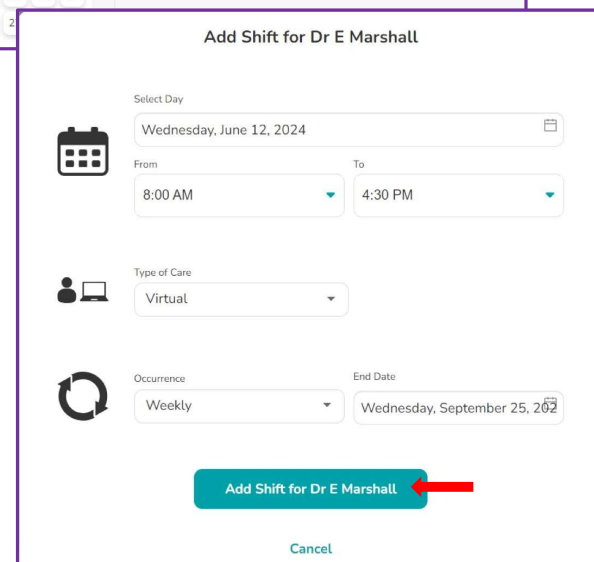
ADD A HEALTHCARE PROVIDER'S SHIFT

- ❑ Select '**Schedule**' in the dashboard
- ❑ Click '**Add Shift**'



The screenshot shows the lumeca Connect PRO dashboard for 'E Admin' (Admin Support / Delegate) at '*Connect* Clinic'. The left sidebar has icons for Clinic, Meet Now, Schedule, Consultations, and Account. The 'Schedule' icon is highlighted. The main area shows a calendar for June 2024 with the 11th selected. To the right, there's a 'Select Schedule' dropdown set to 'Marshall, Dr E', a 'CST (-06:00)' timezone selector, and 'Availability Types' including Virtual, In-Person, and Both Virtual and In-Person. A red arrow points to the 'Add Shift' button in the top left of the main area.

- ❑ 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 ...**'

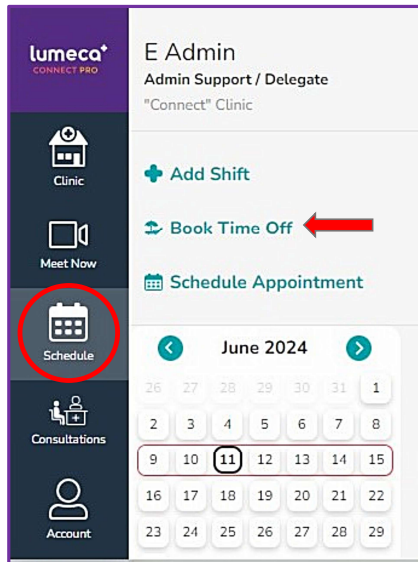


The screenshot shows the 'Add Shift for Dr E Marshall' form. It includes fields for 'Select Day' (Wednesday, June 12, 2024), 'From' (8:00 AM) and 'To' (4:30 PM) times, 'Type of Care' (Virtual), 'Occurrence' (Weekly), and 'End Date' (Wednesday, September 25, 2022). A red arrow points to the 'Add Shift for Dr E Marshall' button at the bottom.

BOOK TIME OFF

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

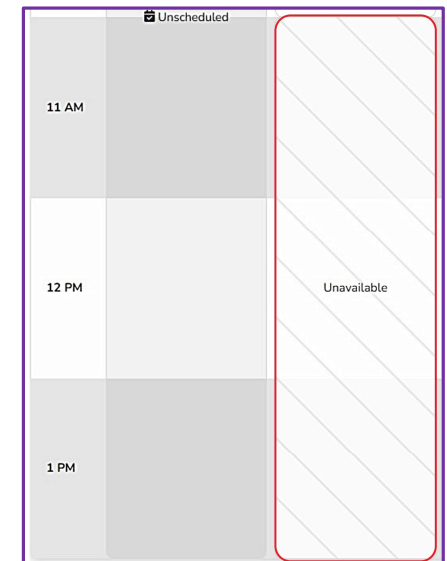
- ❑ Select '**Schedule**' in the dashboard
- ❑ Click '**Book Time Off**'



- ❑ 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

A screenshot of the 'Book Time Off' form for Dr E Marshall. The form includes fields for 'Select Day' (Wednesday, June 12, 2024), 'From' (12:00 PM), 'To' (1:30 PM), 'Occurrence' (Weekly), and 'End Date' (Wednesday, August 28, 2024). At the bottom, there is a green 'Book Time Off' button and a 'Cancel' button with a red arrow pointing to it.

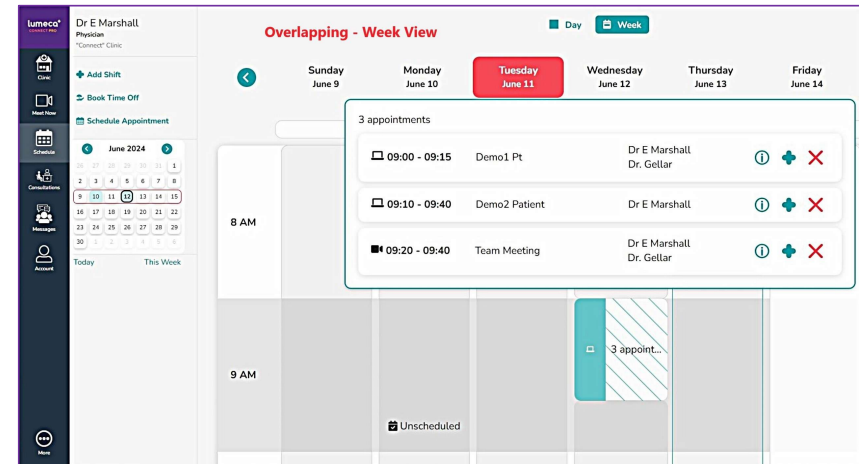
The time off will appear in the calendar as '**Unavailable**'



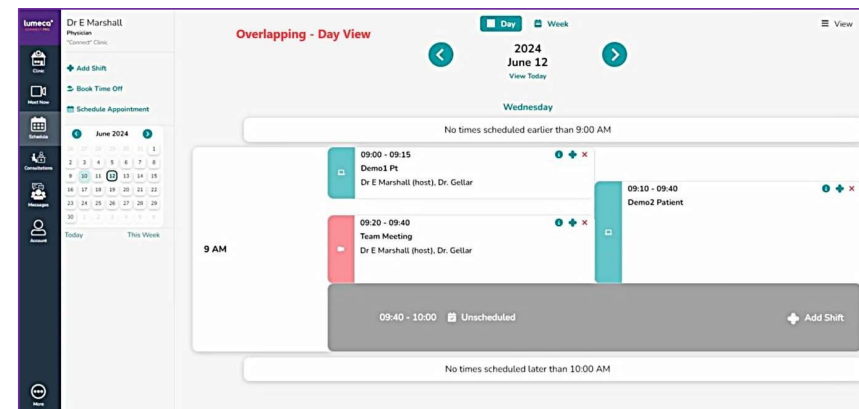
OVERLAPPING APPOINTMENTS

- 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

The logo for lumeca+ VIRTUAL CLINIC is displayed on a purple rectangular background. The word 'lumeca+' is in white, with a small white plus sign to the upper right of the 'a'. Below it, the words 'VIRTUAL CLINIC' are in a smaller, teal-colored, all-caps sans-serif font. To the right of the purple rectangle is a vertical teal bar, and above its top portion is a teal L-shaped graphic element.

lumeca⁺
VIRTUAL CLINIC

'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

The logo for lumeca+ VIRTUAL CLINIC is displayed on a purple rectangular background. The word "lumeca+" is in white, with a small white plus sign to the upper right of the 'a'. Below it, the words "VIRTUAL CLINIC" are in a teal color. To the right of the purple rectangle is a vertical teal bar, and above it is a teal L-shaped graphic element.

lumeca⁺
VIRTUAL CLINIC

'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

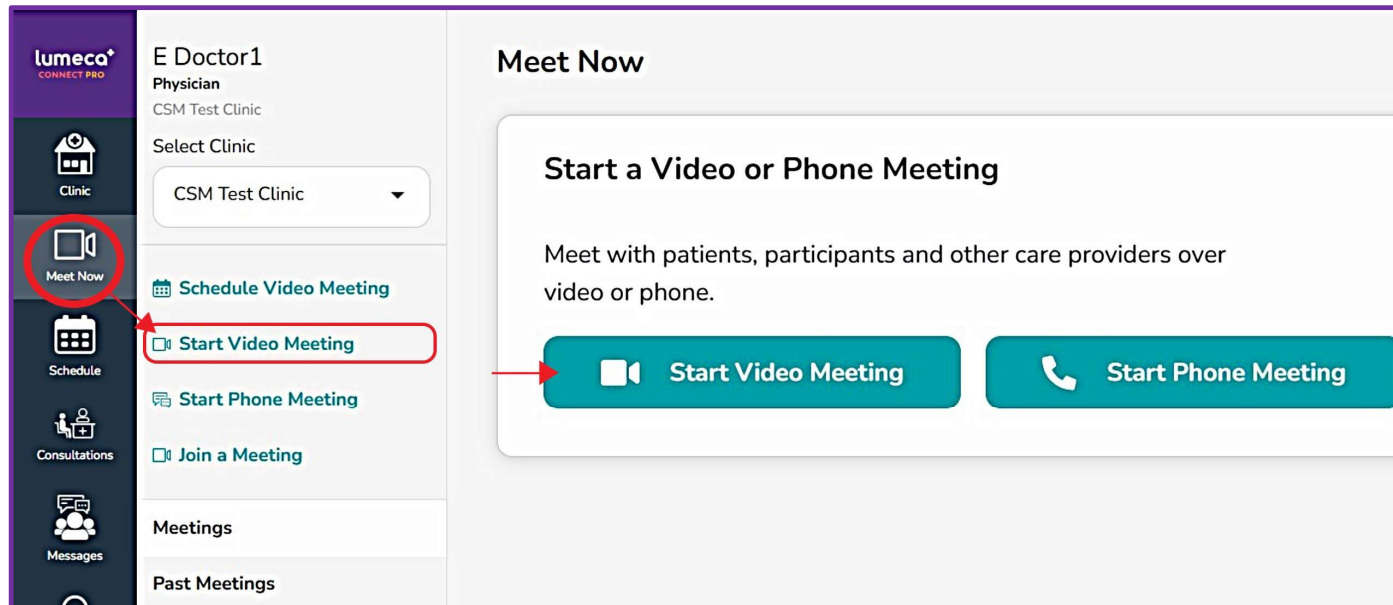
Video Meeting

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.**

☒ Enable microphone when the meeting starts

☒ Enable camera when the meeting starts

☒ Remember my preferences for future meetings

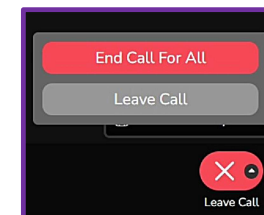
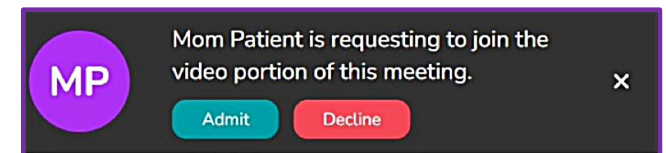
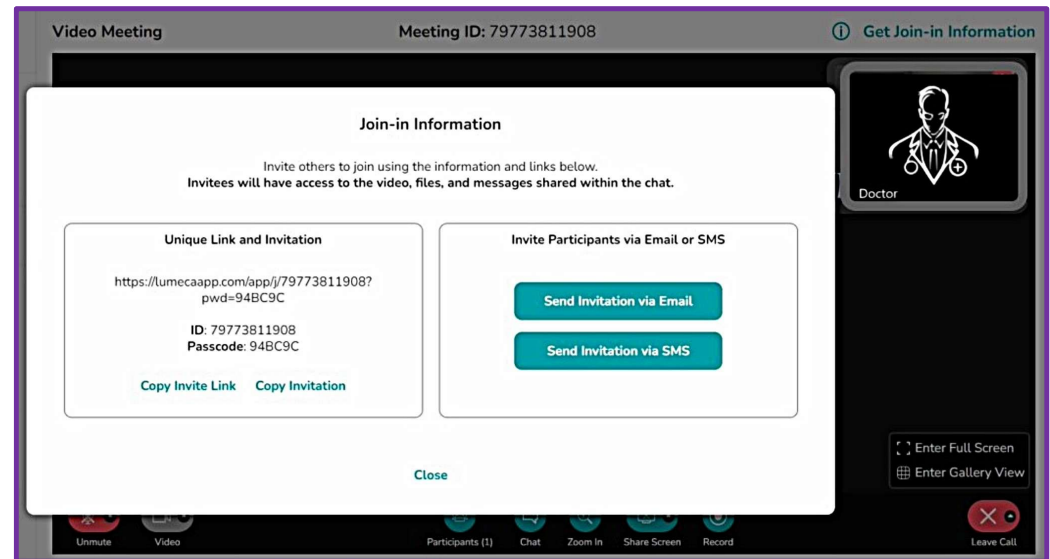
Next

- ☐ Click '**Next**'.
You will be taken directly into the video meeting.

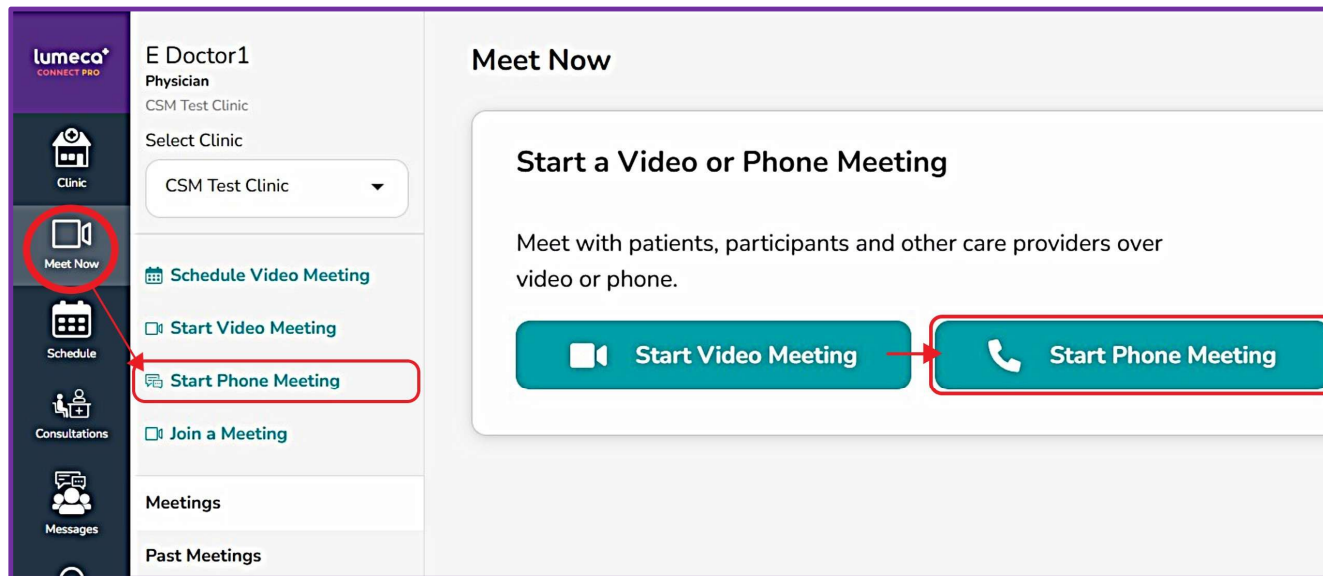
Invite Guests to a Video Meeting – Step 2

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



- ❑ 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)

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

Phone Meeting

Meetings allow you to quickly consult with a patient, their participants and other care providers when needed without scheduling a consultation.

Meetings do not have patient history, patient information, past consultations or the ability to take notes.

You can enter a small note once the meeting is complete for referencing it in the future.

Next

Cancel

Start Phone Meeting

Our system will call your phone and then call the patient(s). Your phone number will **not** be displayed to the patient(s).

Patient or Participant Phone Number

Your Phone Number

Start Phone Call

Cancel

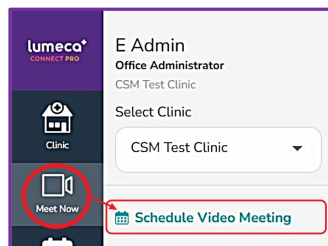
Schedule a Video Meeting - Step 1

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.

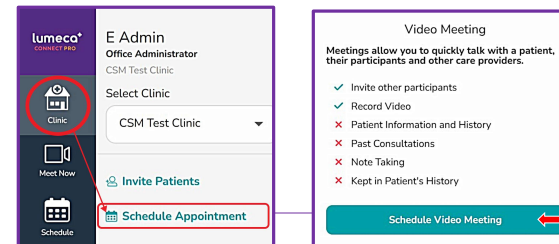
1. The 'Meet Now' tab >

- Select 'Meet Now' > 'Schedule Video Meeting'



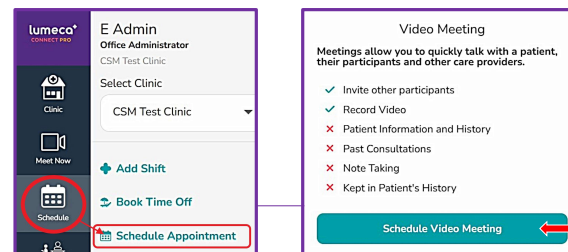
2. The 'Clinic' tab >

- Select 'Schedule Appointment' > 'Schedule Video Meeting'



3. The 'Schedule' tab >

- Select 'Schedule Appointment' > 'Schedule Video Meeting'



Schedule a Video Meeting – Step 2

Schedule a Video Meeting

Meeting Title

Patient 3

Select Provider

Doctor, Demo

+ Invite Another Provider

Schedule a Video Meeting

Meeting Title

Patient 3

Provider

Select or start typing...

Demo Doctor (host)

Dr E Marshall

Next

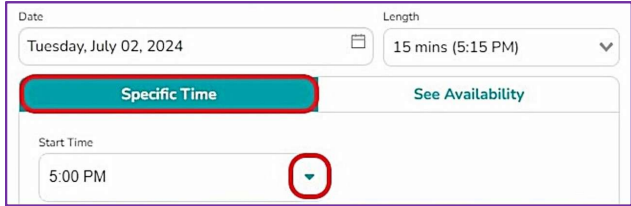
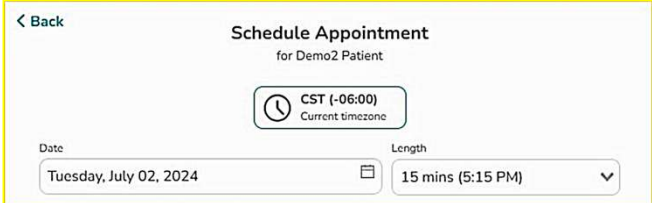
Cancel

- ❑ 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

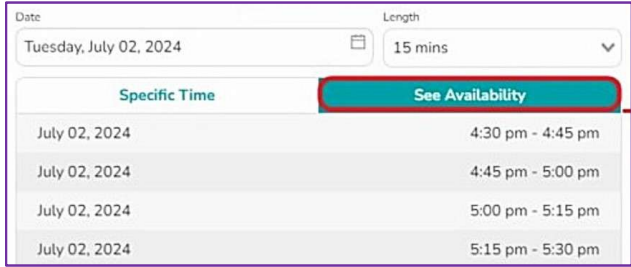
'**Date**' - Enter the date of the meeting or, if scheduling recurring meetings, the first meeting date.

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



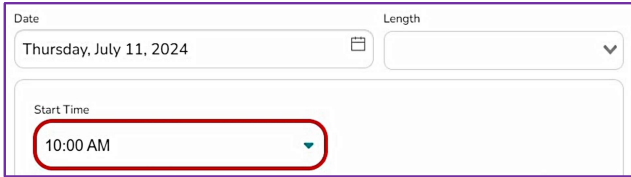
When scheduling a single provider and their schedule **IS NOT** entered in 'Lumeca':

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



When scheduling a single provider and their schedule **IS** entered in 'Lumeca':

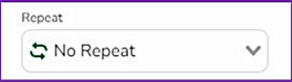
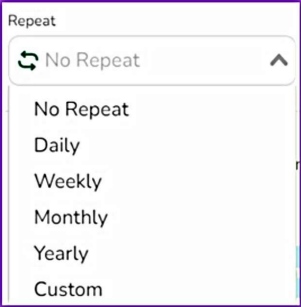



- ☐ Select '**See Availability**'
- ☐ Select an available time from the list



When scheduling multiple providers from the same virtual clinic to join a meeting, the '**See Availability**' and '**Specific Time**' buttons will not 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 : <ul style="list-style-type: none"> ▪ 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.	
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).	
Click ' Schedule Appointment '.	

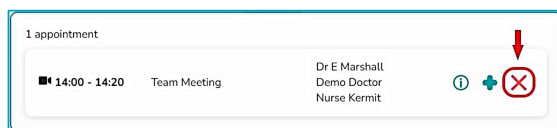
Cancel a Scheduled Meeting

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

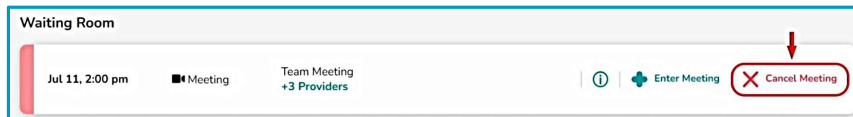
- ❑ Log into your account as the meeting host or the clinic admin
- ❑ Go to either '**Schedule**' or '**Consultations**' in the dashboard. In the '**Schedule**' tab (in 'Week' or 'Day' view), you must click on the meeting you want to cancel.
- ❑ Select '**X – Cancel Meeting**'
- ❑ A pop-up will appear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

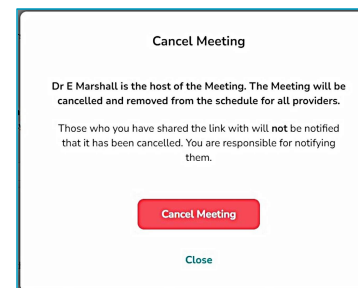
'Schedule' Tab



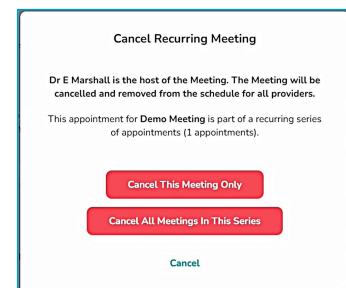
'Consultations' Tab



Confirm 'One-Time' Meeting



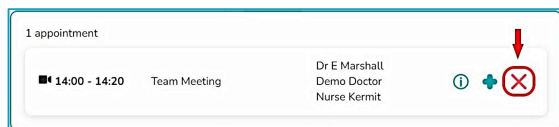
Confirm 'Recurring' Meetings



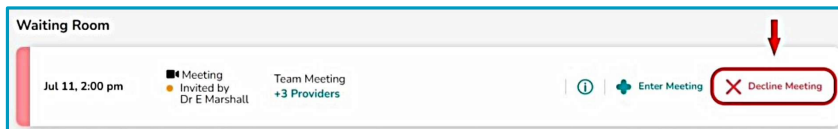
Decline an Invitation to a Scheduled Meeting

- ❑ 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

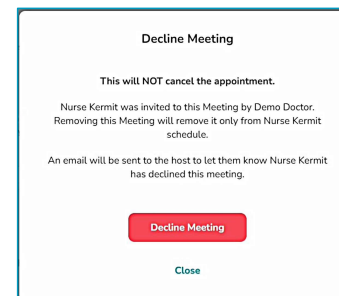


'Consultations' Tab

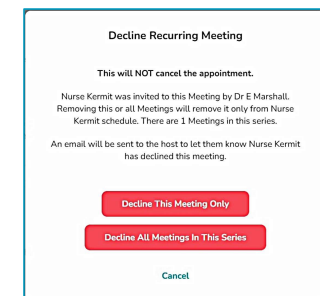


- Done by the invited provider or the clinic admin
- Removes the appointment from their schedule only and will not change the appointment or schedules of other invited providers.
- The meeting host and office admin will receive a notification, based on their 'Notification Settings' (found under 'Account').

Confirm 'One-Time' Meeting



Confirm 'Recurring' Meetings



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)

E Admin
Admin Support / Delegate
"Connect" Clinic

Select Clinic
"Connect" Clinic

Meet Now (circled in red)

Schedule Video Meeting
Start Video Meeting
Start Phone Meeting
Join a Meeting

Meetings
Past Meetings (indicated by a red arrow)

Past Meetings

Participant Name: Date Range: Care Team Member: Dr E Marshall Type: Video

Search Reset Search

First Previous **1** Next Last

Meeting ID	Type	Participants	Date	Transcript
84811323313	Video	Dr E Marshall	Jul 09, 2024 - 01:40 pm	Transcript
Add Note				
79773811908	Video	Dr E Marshall	Jul 09, 2024 - 11:41 am	Transcript
Add Note				

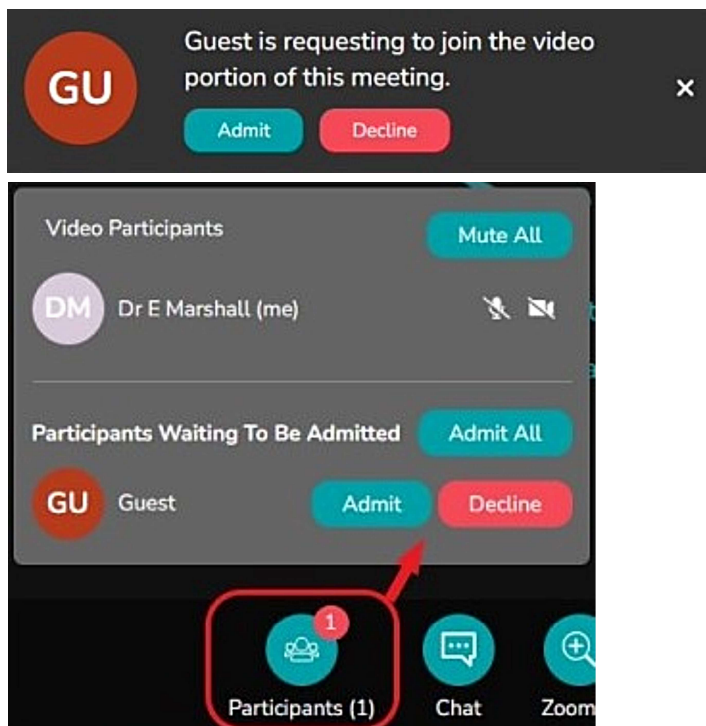
13. Video Session Features

The logo for lumeca+ VIRTUAL CLINIC is displayed on a purple rectangular background. The word "lumeca" is in white lowercase letters, followed by a white plus sign. Below it, the words "VIRTUAL CLINIC" are in teal uppercase letters. To the right of the purple box is a teal vertical bar, and above it is a teal L-shaped graphic element.

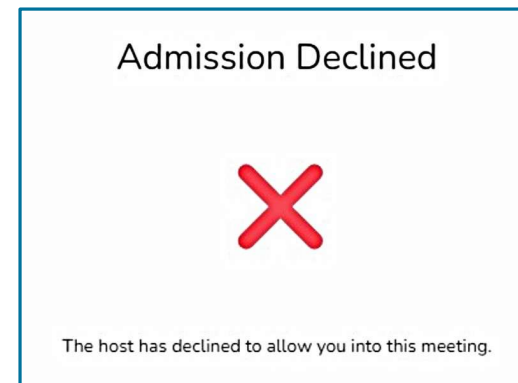
lumeca⁺
VIRTUAL CLINIC

'Admit' or 'Decline' Users into the Video

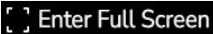
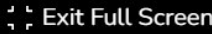








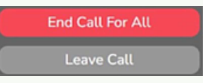



- ❑ All present care team members of your virtual clinic can '**Admit**' or '**Decline**' participants who are requesting to enter the video call.
- ❑ This can be done using the popup that appears over the video screen or from the 'Participants' button.



- ❑ 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.



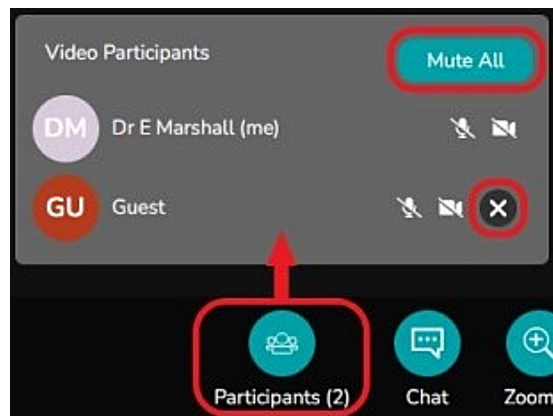
Video Features

 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

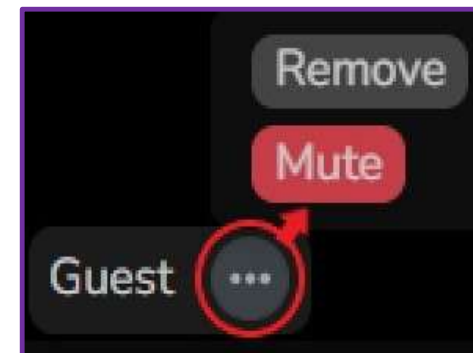
By clicking the '**Participants**' button, the meeting host can:

- 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

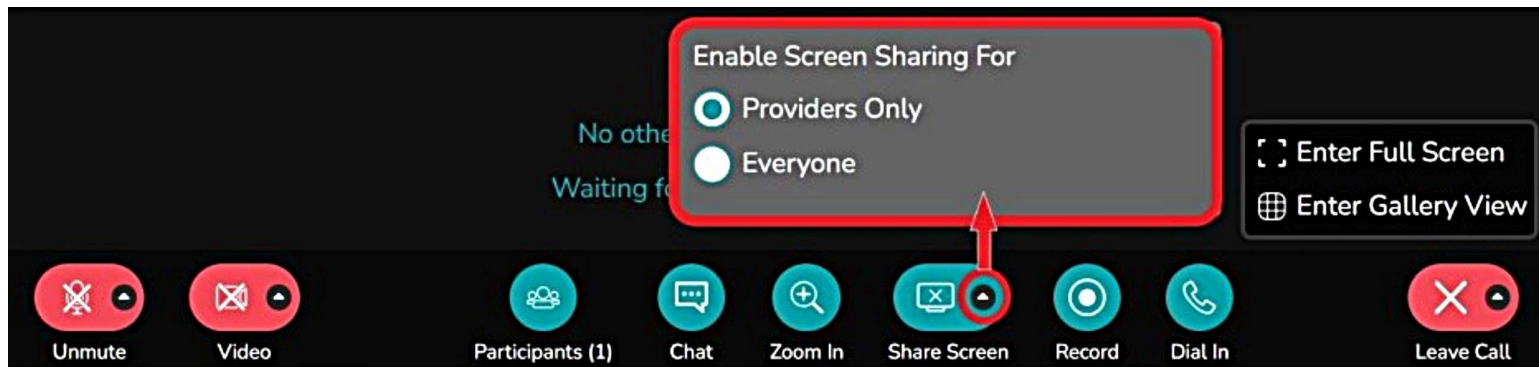


By clicking the '**3 dots**' in the lower-left corner of a participant's video, the meeting host can:

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



Sharing a Screen Within a Video



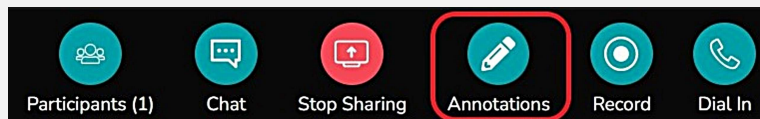
All participants within the video call can share their screens and annotate, if enabled by the video chat host.

- ❑ 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:

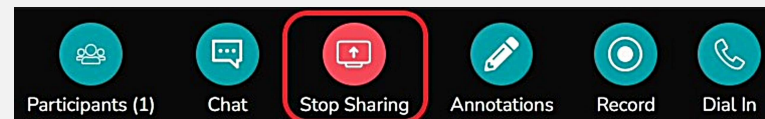
Annotations

Click to highlight specific areas on your shared screen



Stop Sharing

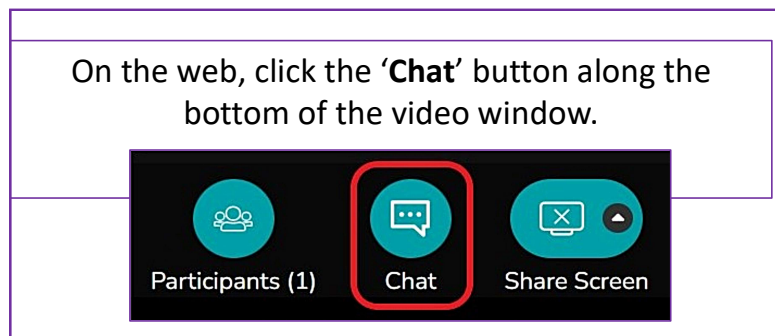
Click to stop sharing your screen



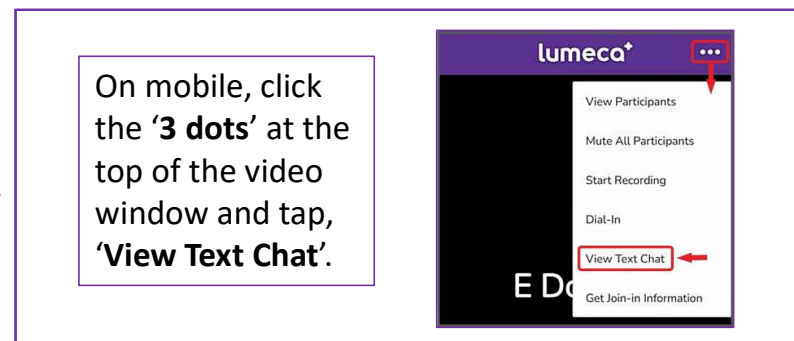
Send a Chat Message

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:



OR



- ❑ 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.

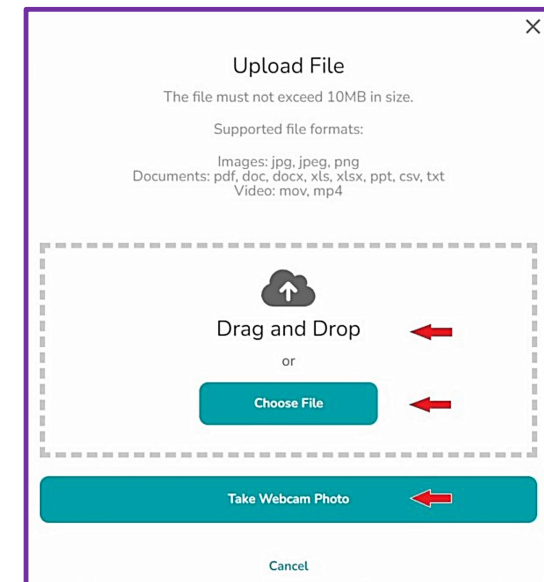
Upload a File (Photo, Video or Document)

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

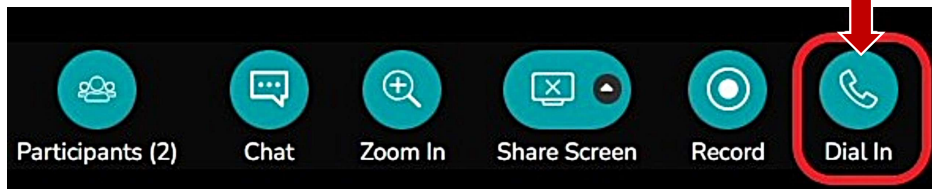
- ❑ Open the 'Chat' window (see instructions on previous screen).
- ❑ Select the camera/document icon  located beneath the 'message' box.
- ❑ Note the supported file formats listed, then choose one of the 3 options:
 - Drag and Drop from a saved location on your device
 - Choose a saved file from your 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.



Dial a Participant Into the Video Chat

A screenshot of the 'Dial In Participant To Video Chat' dialog box. The dialog has a purple border and a close button (X) in the top left. It contains the following elements: a title bar, a warning message, a 'Display Name' field with a red arrow pointing to it, a 'Phone Number' field with a red arrow pointing to it, a 'Dial In Now' button, and a 'Cancel' button.

x

Dial In Participant To Video Chat

Participants that are dialed in will be disconnected when the video chat ends.

Display Name
(how their name will appear in the video chat)

Patient's Partner

Phone Number

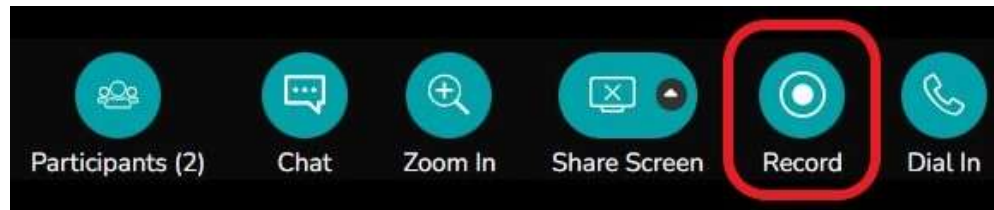
(306) 000-0000

Dial In Now

Cancel

- ☐ 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



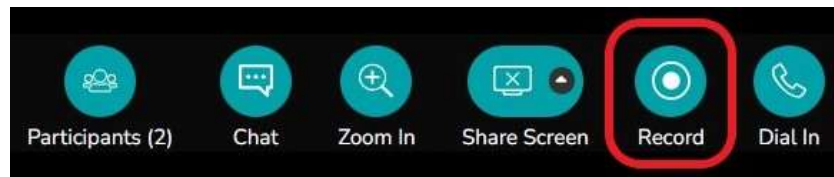
The '**Record a Video Call**' feature is **turned off by default** and requires a request to be turned on.

This button will not appear if the feature is disabled.

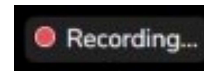
- Email us at sales@lumeca.com, OR
- Click this link and send us a message, <https://lumeca.com/get-in-touch/>

Recording a Video Call

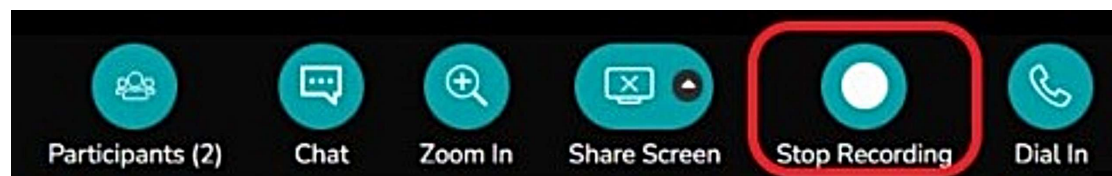
- ❑ To begin recording, click '**Record**'.



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.

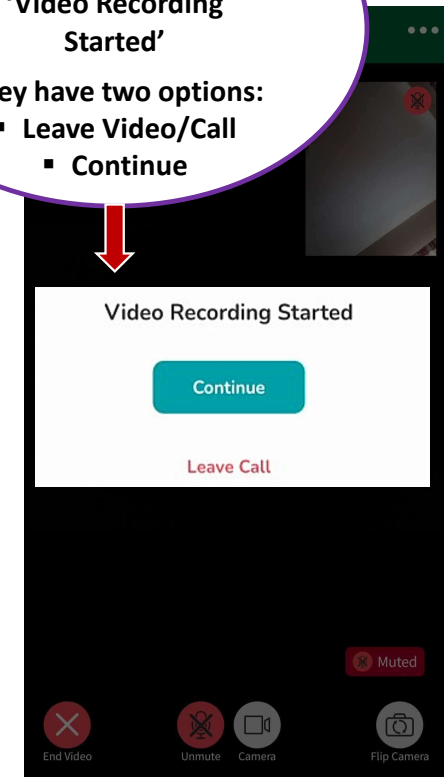


- ❑ When all participants leave a video meeting or consultation video call, the recording will stop automatically.

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.

The logo for lumeca+ Virtual Clinic is displayed on a dark purple rectangular background. The word "lumeca+" is in a white, lowercase, sans-serif font, with a small white plus sign to the upper right of the 'a'. Below it, the words "VIRTUAL CLINIC" are in a teal, uppercase, sans-serif font. To the right of the purple rectangle is a vertical teal bar, and above the top right corner of the purple rectangle is a teal L-shaped graphic element.

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

lumeco
CONNECT PRO

E Admin
Admin Support / Delegate
"Connect" Clinic

Select Clinic
"Connect" Clinic

Invite Patients

Schedule Appointment
Invite Care Team Member

Home
Patients
Care Team
Appointment Reasons
Clinic Settings

Invite Patients

Send an Invitation
Inviting a patient will also generate an invite code that you can give to a specific patient. You can view this code by going to "Patients" and viewing your pending invite list.

Provider
Doctor, Demo

First Name *
Last Name *

+ Invite Another Patient

Invite Patient(s)

Number

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'**

Invite Patients

Send an Invitation
Inviting a patient will also generate an invite code that you can give to a specific patient. You can view this code by going to "Patients" and viewing your pending invite list.

Provider
Marshall, Dr E

First Name * Baby Last Name * Patient Email Mobile Number

+ Invite Another Patient

You will invite **1 patient** to join your clinic.
If you enter a email or mobile number for a patient they will receive a message with a link to accept the invite. Otherwise, you must provide them with the invite code directly.

Invite Patient(s)

Send Invites?
Invitations will be sent to these patients to register with

DM	Dr E Marshall	✓	
"Connect" Clinic			
First Name Baby	Last Name Patient	Email	Mobile Number

Confirm and Invite

Cancel

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

Invited Patients						
			Providers	Status		
<input type="text" value="Search first name, last name or email"/>			<input type="text" value="Add Provider"/>	<input type="text" value="Add Status"/>		
Name	Provider	Date Invited	Date Accepted	Phone Number	Email	Invite Code
Uncle Patient	Dr E Marshall	July 2, 2024			uncle@testtesttest.com	GHTKYT
Baby Patient	Dr E Marshall	July 2, 2024				3T92JX

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

Upload File to Invite Multiple Patients

Upload a CSV using our template. If you are using your own CSV file, make sure the columns are in the same order as our template.

[Click here to download CSV Template](#)

Provider

Doctor, Demo

Import CSV

	A	B	C	D	E	F	G	H	I	J
1	first_name	last_name	email	phone						
2	Dad	Patient	Dad@email.com	3065511234						
3	Mom	Patient	Mom@email.com							
4	John	Patient	John@email.com							
5	Jane	Patient	Jane@email.com							
6	Aunt	Patient		3065515555						
7	Uncle	Patient		3065551111						
8										
9										
10										

File name: Ev Doctor1 patient-invite-June09-2022

Save as type: CSV (Comma delimited)

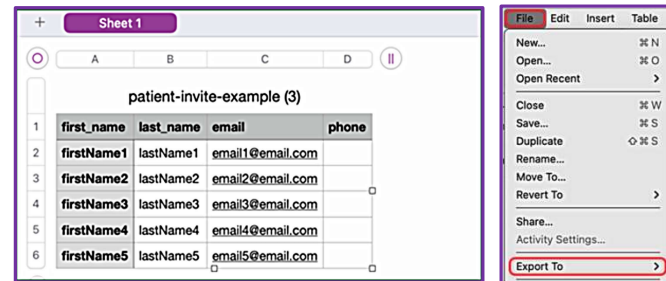
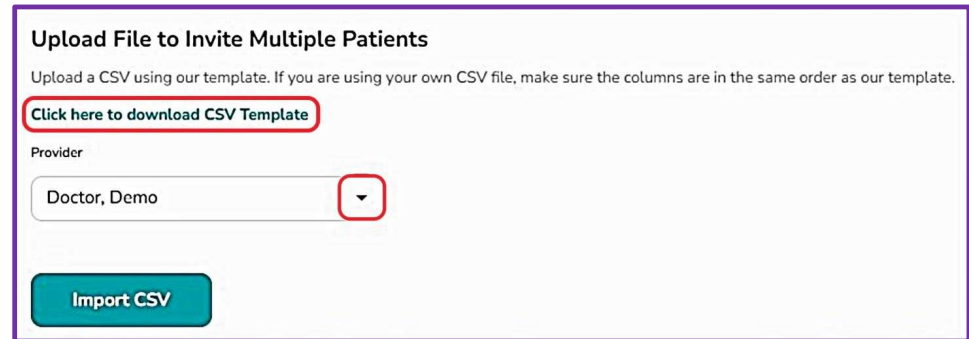
Save Cancel

Method 3: Import a CSV File with a Large Group of Patients

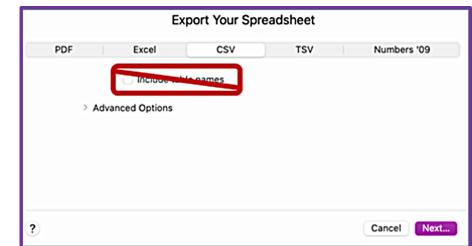
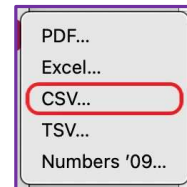
- For MAC Users Without Excel Installed -

- ❑ 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



	first_name	last_name	email	phone
1	first_name1	lastName1	email1@email.com	
2	first_name2	lastName2	email2@email.com	
3	first_name3	lastName3	email3@email.com	
4	first_name4	lastName4	email4@email.com	
5	first_name5	lastName5	email5@email.com	



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							
Providers				Status			
<input type="text" value="Search first name, last name or email"/>		<input type="text" value="Add Provider"/>		<input type="text" value="Add Status"/>		<input type="button" value="Filter"/>	
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+babyb@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

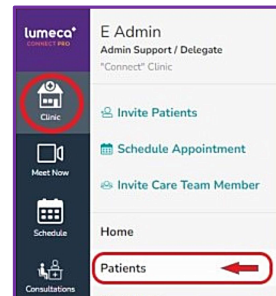
Patients will only appear after you have invited them to join your virtual clinic, they have accepted your invitation and created their 'Lumeca Health' account.

The logo for Lumeca+ Virtual Clinic is displayed on a dark purple rectangular background. The word "lumeca" is in a white, lowercase, sans-serif font, followed by a white plus sign. Below this, the words "VIRTUAL CLINIC" are written in a smaller, uppercase, sans-serif font in a light blue color. To the right of the purple box, there is a vertical teal bar that extends from the top of the slide to the bottom.

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.

A screenshot of the 'Patients' search interface. The top section is titled 'Patients' and includes an 'Invite Patients' button. Below this is a 'Search for a Patient' section with two input fields: 'Patient Name, ID or Health Card Number' and 'Provider (optional)'. The first field contains 'Name, ID or Health Card Number' and the second contains 'Providers'. A red circle highlights the first field, and a red arrow points to the 'Search' button. Below the search fields are 'Search' and 'Reset Search' buttons. The bottom section is titled 'Search Results' and contains a table with the following data:

Name	Birthdate	Last Consultation Date	Consultation Status	Upcoming Appointments	Provider Association
Demo2 Patient	Jan 1, 2000	Jun 18th, 2024	Archived	0	Yes
Demo1 Pt	Jan 1, 2000	Jun 18th, 2024	Archived	0	Yes


A red circle highlights the first row of the table, and a red arrow points to the 'Yes' in the 'Provider Association' column. At the bottom right, it says '1 to 2 of 2 Patients'.

Patient Search

Demo2 Patient

Select Physician
Doctor, Demo

Patient ID: **41174** Health Card Number: **123456789** [New Consultation](#)


[Remove Patient](#)

Contact Information

[Redacted Contact Information]

Age and Gender

Born on January 1, 2000
24 years old
Female

Location

Regina, Saskatchewan
S4S 4S4
123 Main Street

Providers

Dr E Marshall [Remove Provider](#)

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'**

[Remove Patient](#)

[Patient 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.

The logo for lumeca+ VIRTUAL CLINIC is displayed on a dark purple rectangular background. The word "lumeca+" is in a white, lowercase, sans-serif font, with a small white plus sign to the upper right of the 'a'. Below it, the words "VIRTUAL CLINIC" are in a smaller, uppercase, sans-serif font, colored in a light blue or teal. To the right of the purple rectangle, there is a vertical teal bar that extends from the top of the slide to the bottom.

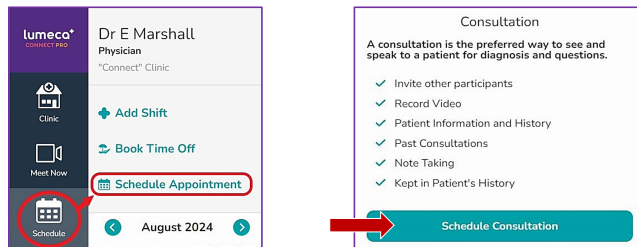
Schedule a Patient Consultation - Step 1

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. ★

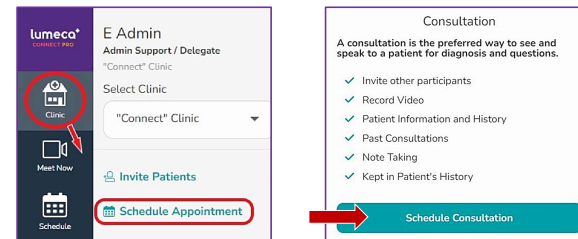
★ 1. The **'Schedule'** tab >

- Select **'Schedule Appointment'** > **'Schedule Consultation'**



2. The **'Clinic'** tab >

- Select **'Schedule Appointment'** > **'Schedule Consultation'**



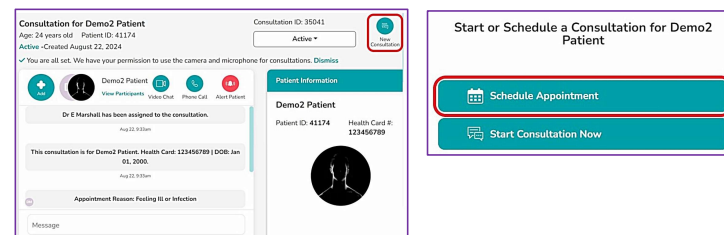
3. The **'Patients'** tab >

- 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'**

The screenshot shows a web interface titled "Select Patient" with a "< Back" link. Below the title is the instruction "Search for and select a patient to schedule an appointment for them." and a search prompt "Search by first name, last name, or health card number." A search input field contains the text "demo". Below the input, two patient entries are listed: "Demo2 Patient DOB: (January 1, 2000)" and "Demo1 Pt DOB: (January 1, 2000)". The second entry is highlighted with a blue border. At the bottom right is a teal "Select Patient" button. Red arrows point to the search input, the highlighted patient entry, and the "Select Patient" button.

< 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

Schedule Appointment
for Demo1 Pt

Select Provider
Doctor, Demo

[+ Invite Another Provider](#)

Type of Care
Virtual

Select Appointment Reason
Feeling Ill or Infection

Next
Cancel

Schedule Appointment
for Demo1 Pt

Provider
Select or start typing...

Demo Doctor (host)
Dr E Marshall

Type of Care
Virtual

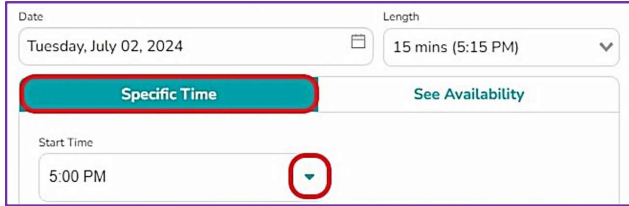
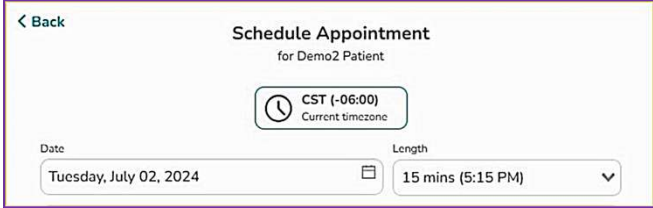
Select Appointment Reason
Feeling Ill or Infection

Next
Cancel

- ❑ 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**'

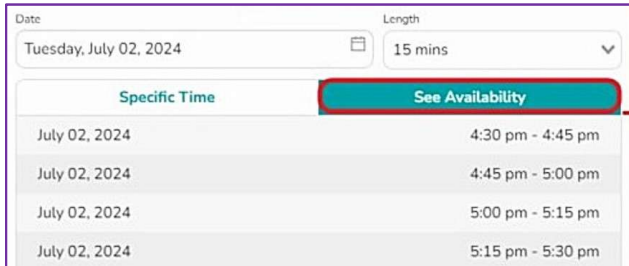
Schedule a Patient Consultation - Step 4

- ☐ **'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)



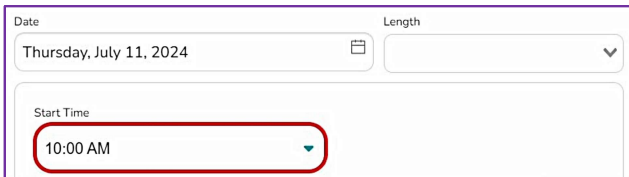
When scheduling a single provider and their schedule **IS NOT** entered in 'Lumeca':

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



When scheduling a single provider and their schedule **IS** entered in 'Lumeca':

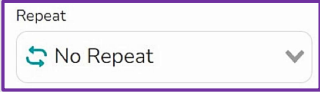
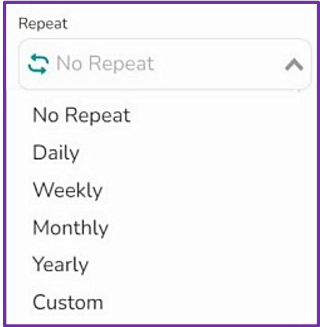



- ☐ Select **'See Availability'**
- ☐ Select an available time from the list



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

- ☐ Select a **'Start Time'**.

Schedule a Patient Consultation - Step 5 - 'Repeat'

If scheduling a <u>one-time</u> consultation, select ' No Repeat '.	
If scheduling <u>recurring</u> consultations, choose the occurrence : <ul style="list-style-type: none"> ▪ 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 consultation is to occur. A note will indicate the appointment(s) being scheduled.	
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.	
Click ' Schedule Appointment '.	

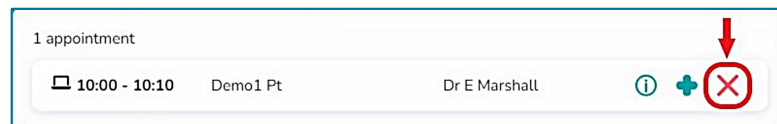
Cancel a Scheduled Patient Consultation

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

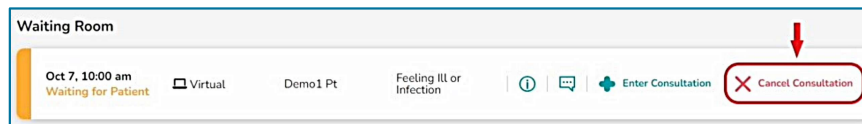
- ❑ Log into your account as the consultation host or the clinic admin
- ❑ Go to either '**Schedule**' or '**Consultations**' in the dashboard. In the '**Schedule**' tab (in 'Week' or 'Day' view), you must click on the consultation you want to cancel.
- ❑ Select '**X – Cancel Consultation**'
- ❑ A pop-up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

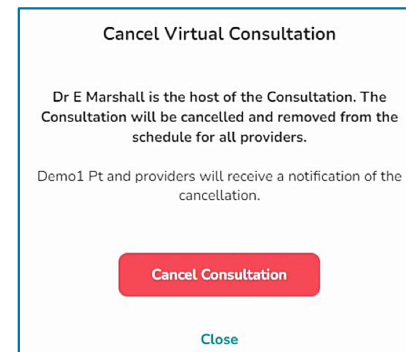
'Schedule' Tab



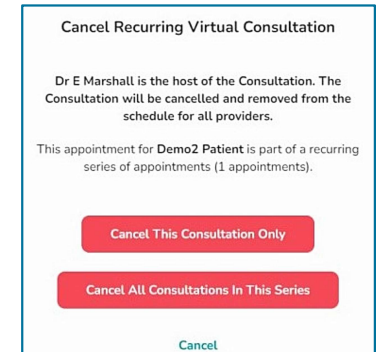
'Consultations' Tab



Confirm 'One-Time' Consultation



Confirm 'Recurring' Consultation

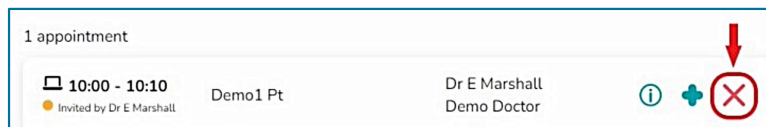


Decline an Invitation to a Scheduled Patient Consultation

- ❑ 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

Decline Virtual Consultation

This will NOT cancel the appointment.

Demo Doctor was invited to this Consultation by Dr E Marshall. Removing this Consultation will remove it only from Demo Doctor schedule.

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

Decline Consultation

Close

Confirm 'Recurring' Consultation

Decline Recurring Virtual Consultation

This will NOT cancel the appointment.

Demo Doctor was invited to this Consultation by Dr E Marshall. Removing this or all Consultations will remove it only from Demo Doctor schedule. There are 1 Consultations in this series.

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

Decline This Consultation Only

Decline All Consultations In This Series

Cancel

Patient Makes an Online Request to Cancel Their Scheduled Consultation

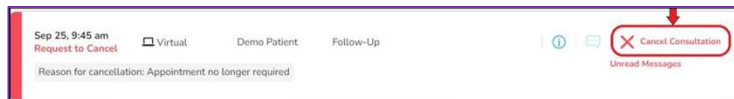
Patients may log into their 'Lumeca Health' account and make an online request to have their appointment cancelled.

Clinic users will find these requests under either...

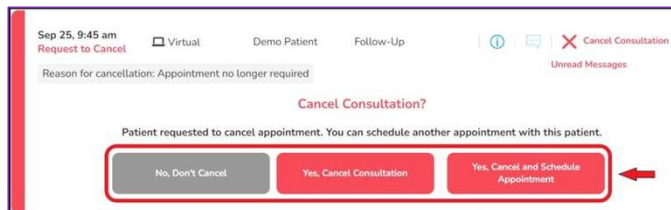
Consultations Tab >

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

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

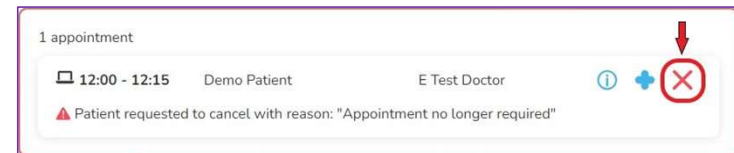


- ❑ Select one of the three available choices:
 - **No, Don't Cancel**
 - **Yes, Cancel Consultation** – choosing this option will promptly cancel the appointment.
 - **Yes, Cancel and Schedule Appointment** – by clicking this option, the appointment will be cancelled immediately, and you will be redirected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

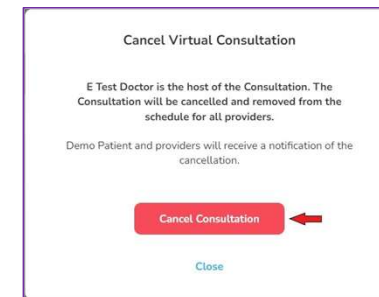


Schedule Tab >

- ❑ 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.



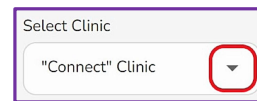
17. Enter Scheduled Appointments



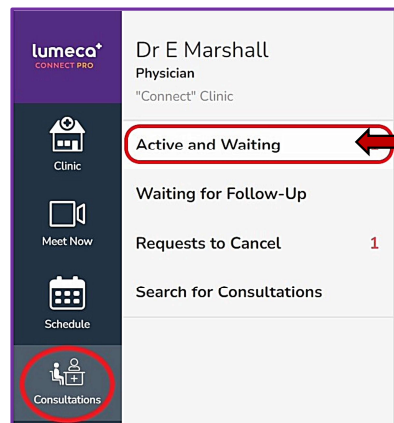
The 'Active & Waiting' Screen

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.

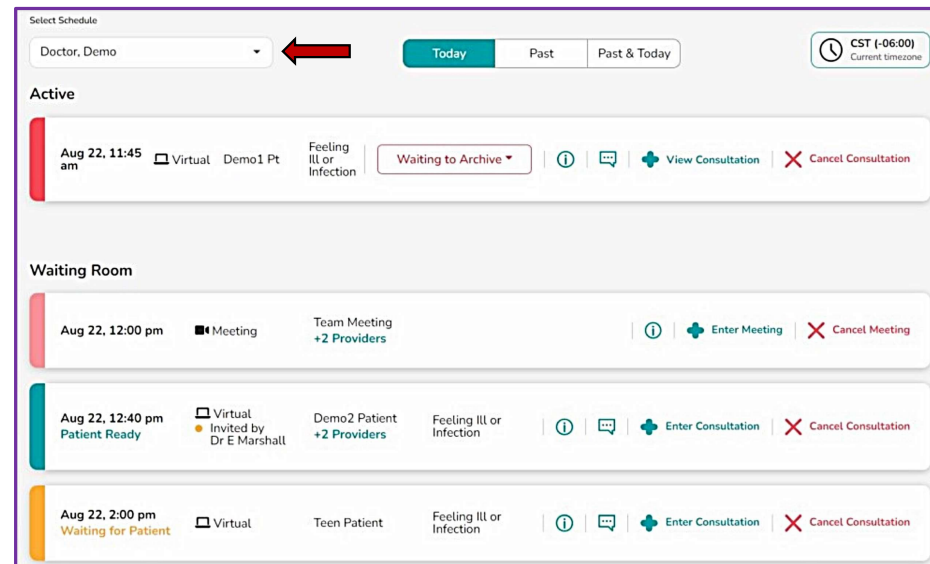
- ❑ If working with more than one clinic/ location, choose from the '**Select Clinic**' drop-down menu.



- ❑ Select '**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

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:

Scheduled Patient Consultations and Meetings:

- 'Patient is Ready'
- 'Waiting for Patient'
- Scheduled Video Meeting

Waiting Room

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

PINK – scheduled 'Meet Now' Video Meetings






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

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







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

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

Active & Pending Screen Features – Page 1

<div> <div>Today</div> <div>Past</div> <div>Past & Today</div> </div>	Filter appointments from today, the past or both
<div>Aug 22, 12:00 pm</div>	Appointment Date and Time
<div>  or  or  </div>	Appointment Type (Virtual, In-Person or Video Meeting)
<div> <div>Team Meeting</div> or <div>Demo Patient</div> </div>	Name of Meeting or Patient
<div>+2 Providers</div>	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.
<div>Feeling Ill or Infection</div>	Reason for patient consultation
<div></div>	Shareable Consultation or Meeting Link
<div></div>	Quick Message – present messages to send to patients (available for consults only)

Active & Pending Screen Features – Page 2

	<p>'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.</p>
	<p>'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.</p>
 	<p>Cancel – the host provider or their admin can cancel the appointment entirely Decline – the invited provider can decline their invitation to the appointment only</p>
	<p>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</p>
	<p>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.</p>

18. Starting a Scheduled Patient Consultation or Video Meeting

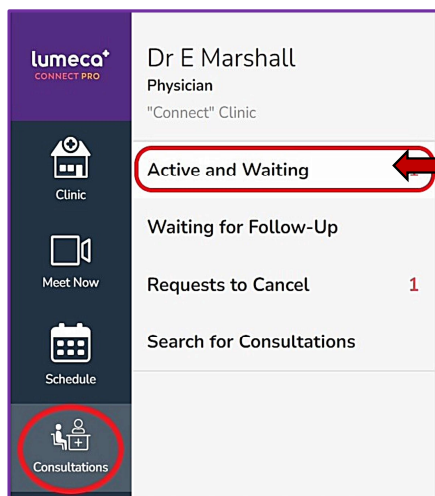
The logo for lumeca+ VIRTUAL CLINIC is displayed on a purple rectangular background. The word "lumeca" is in white lowercase letters, followed by a white plus sign. Below it, the words "VIRTUAL CLINIC" are in teal uppercase letters. To the right of the purple box is a teal vertical bar, and above it is a teal horizontal bar, forming an L-shape.

lumeca⁺
VIRTUAL CLINIC

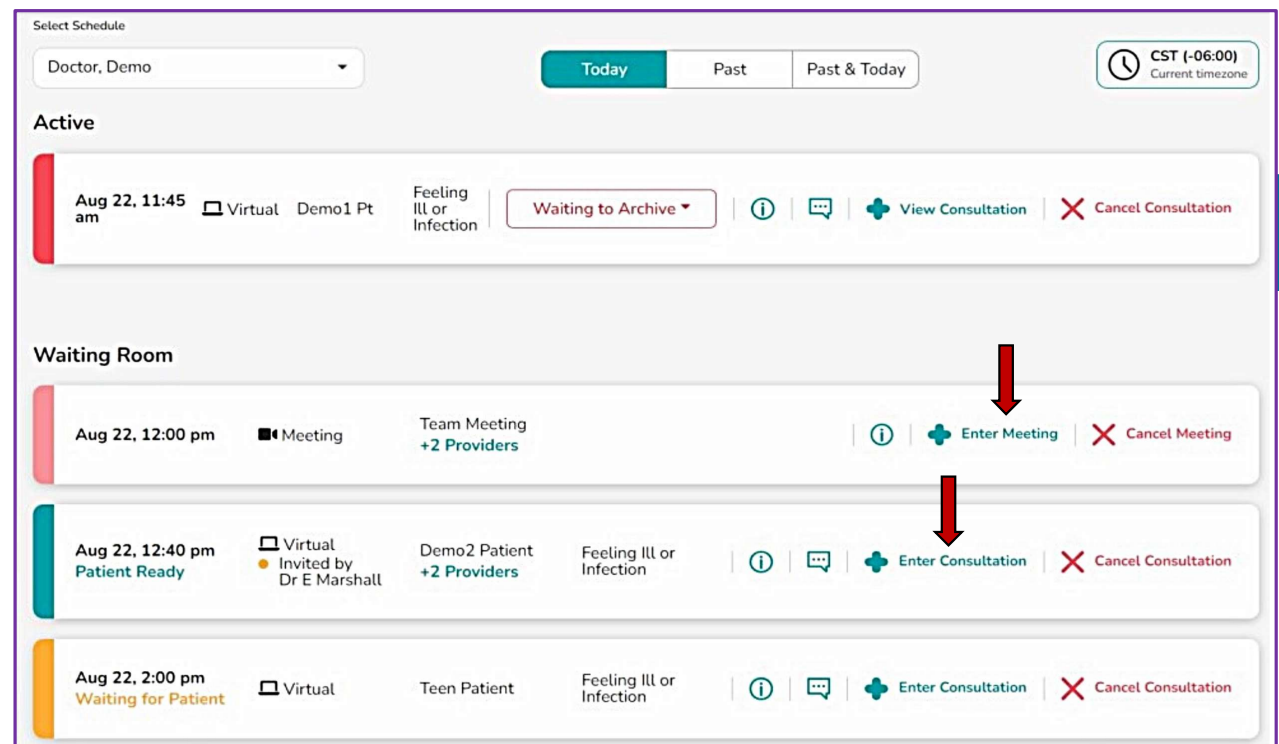
Starting a Patient Consultation or Video Meeting

❑ 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'*.

Consultation for Demo2 Patient
Age: 24 years old Patient ID: 41174
Assigned - Created August 22, 2024

Active ▾ New Consultation Forms

Add Demo2 Patient View Participants Video Chat Phone Call Alert Patient

In order to start chatting, you must enter the consultation.

Enter Consultation ←

Dr E Marshall has been assigned to the consultation.
Aug 22, 4:32pm

This consultation is for Demo2 Patient. Health Card #: 123456789 | DOB: Jan 01, 2000.
Aug 22, 4:32pm

Appointment Reason: Feeling Ill or Infection
Aug 22, 4:32pm

Patient Information

Demo2 Patient
Patient ID: 41174 Health Card #: 123456789

Contact Information

Age and Gender
Born on January 1, 2000
24 years old
Female

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


Aug 22, 4:32pm

Appointment Reason: Feeling Ill or Infection
Aug 22, 4:32pm

Dr E Marshall has entered the consultation.
Aug 22, 4:36pm

Message ←

Send

- ❑ **!** 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

Consultation for Demo2 Patient
Age: 24 years old Patient ID: 41174
Active -Created August 22, 2024

Consultation ID: 35045

Active

New Consultation Forms

We need your permission to access the camera and microphone. Permission is required to speak to a patient. [Enable Permissions](#)

Navigation: Add, Demo2 Patient, View Participants, Video Chat, Phone Call, Alert Patient

Chat Log:

- Dr E Marshall has been assigned to the consultation. (Aug 22, 4:32pm)
- This consultation is for Demo2 Patient. Health Card: 123456789 | DOB: Jan 01, 2000. (Aug 22, 4:32pm)
- Appointment Reason: Feeling Ill or Infection (Aug 22, 4:32pm)
- Dr E Marshall has entered the consultation. (Aug 22, 4:36pm)

Message Input: Message [Send]

Patient Information:

Demo2 Patient

Patient ID: 41174 Health Card #: 123456789

Contact Information

Age and Gender

Born on January 1, 2000
24 years old
Female

Location

123 Main Street, Regina, Saskatchewan, S4S 4S4

'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**'.

The screenshot shows the 'Start Video Chat' dialog box. At the top, it says 'Please select who you would like to join the video chat for Demo2 Patient.' Below this, there are two sections: 'Patient' and 'Care Team'. Under 'Patient', there is a single entry 'Demo2 Patient' with a yellow circle next to it. Under 'Care Team', there are two entries: 'Dr E Marshall' with a 'PRIMARY' tag and 'Dr. Drew'. To the right of each entry is a checkbox. The checkbox for 'Dr E Marshall' is checked and circled in red. The checkbox for 'Dr. Drew' is also checked and circled in red. Below the participant lists, there is a checkbox labeled 'Prevent Other Consultation Participants From Joining' which is checked and highlighted with a yellow box. Below this, there are three more checkboxes: 'Enable microphone when the meeting starts', 'Enable camera when the meeting starts', and 'Remember my preferences for future meetings', all of which are checked and grouped by a brown box. At the bottom, there is a red button labeled 'Start Video Chat' and a 'Cancel' link.

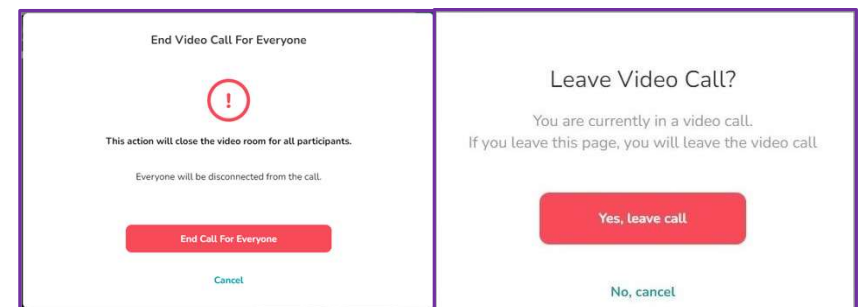
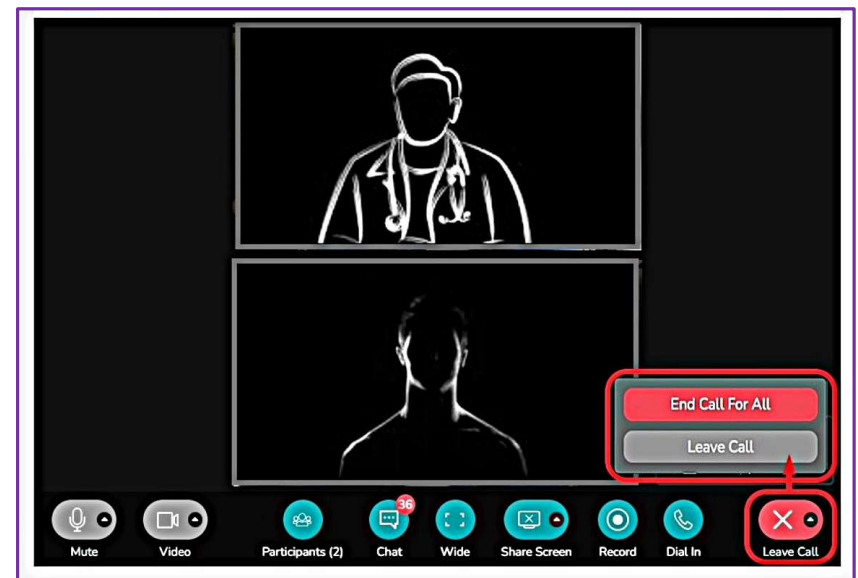
End a Video Chat in a Patient Consultation

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 team remains on the video call, others can leave the video and rejoin if needed.



Archive Completed Consultations

The screenshot displays a consultation interface for a patient named Demo2. The top section shows the consultation ID (35045) and the patient's age (24 years old) and ID (41174). The status is 'Active' and it was created on August 22, 2024. Below this, there is a list of events: 'Dr E Marshall started a video call.', 'Dr E Marshall joined the video call.', 'Missed Call from Dr E Marshall.', and 'Missed Call.'. To the right, there is a dropdown menu for the 'Active' status, which includes options: 'Active', 'Pending Imaging', 'Pending Labs', 'Referred to Specialist', 'Pending Other', 'Cancel Consultation', and 'Archive Consultation'. A red arrow points to the 'Archive Consultation' option. The patient's contact information is also visible, including a mobile phone number (306) 434-5335 and a home phone number. The location is listed as 123 Main Street, Regina, Saskatchewan, S4S 4S4.

- ❑ 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

The logo for lumeca+ VIRTUAL CLINIC is displayed on a purple rectangular background. The word "lumeca+" is in white, with a small white plus sign to the upper right of the 'a'. Below it, the words "VIRTUAL CLINIC" are in a teal color. To the right of the purple rectangle is a vertical teal bar, and above its top portion is a teal L-shaped graphic element.

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Past 'Meet Now' Video Meetings

lumeco
E Admin
Admin Support / Delegate
Connect Clinic
Select Clinic
Connect Clinic

Meet Now (highlighted in sidebar)
Schedule Video Meeting
Start Video Meeting
Start Phone Meeting
Join a Meeting

Past Meetings (highlighted in sidebar)

Past Meetings Section:

Participant Name: Date Range: Care Team Member: Type: (highlighted with red box and arrow)

Search (highlighted with red box and arrow)

First Previous **1** Next Last

Meeting ID	Type	Participants	Date	
74349979074	Video	Dr E Marshall	Aug 16, 2024 - 03:20 pm	Transcript
Add Note				
35782902252	Video	Dr E Marshall, Demo Patient	Aug 15, 2024 - 03:28 pm	Transcript
Add Note				
37525647711	Video	Dr E Marshall	Aug 13, 2024 - 02:54 pm	Transcript
Add Note				

- ❑ 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'

E Admin
Admin Support / Delegate
"Connect" Clinic

Select Clinic
"Connect" Clinic

Active and Waiting
Waiting for Follow-Up
Requests to Cancel

Search for Consultations

Consult ID Patient Name or ID Province Add Province Consultation Status Active Care Team Members Dr E Marshall Date Range Add Date

Search

Search Results

ID	Name	Assigned To	Patient ID	Created	Updated At	Status
35045	Demo2 Patient	Nancy Drew Dr E Marshall Ruffo Connect E Admin	41174	2024-08-22 04:32	2024-08-23 11:33	Active
35041	Demo2 Patient	Dr E Marshall	41174	2024-08-22 09:33	2024-0	

- ❑ 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.

Past Meetings

Participant Name: Date Range: Care Team Member: (Myself) E Admin

Type: Video

Search **Reset Search**

First Previous 1 Next Last

Meeting ID	Type	Participants	Date
79957414913	Video	E Admin	Aug 23, 2024 - 02:32 pm

Recorded Transcript Recording 1

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**'

Consultation for Demo2 Patient

Age: 24 years old Patient ID: 41174

Active - Created August 22, 2024

Consultation ID: 35045

Active

Video Recordings

Duration	Status	Date
01:27	Success	Aug 23, 2024 02:42 PM

Refresh

20. The 'Messages' Feature.

The logo for lumeca+ VIRTUAL CLINIC is displayed on a purple rectangular background. The word "lumeca" is in white lowercase letters, followed by a white plus sign. Below this, the words "VIRTUAL CLINIC" are written in a smaller, teal, all-caps sans-serif font.

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VIRTUAL CLINIC

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**

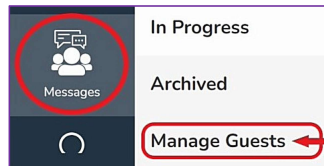
☐ **Archive Guests**

- 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'**.



Manage Guests

Done Inviting Guest

Guests have limited access to Messages. Once invited, clinic members can add them as participants to chats.

Invite Guest

Invite a guest through email to join Messages at Jess Test Clinic 1.

First Name *

Last Name *

Email *

Mobile Phone

+ Invite Another Guest

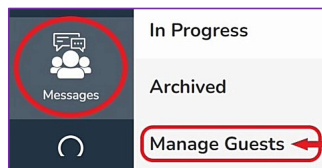
Invite Guest

Guest Status

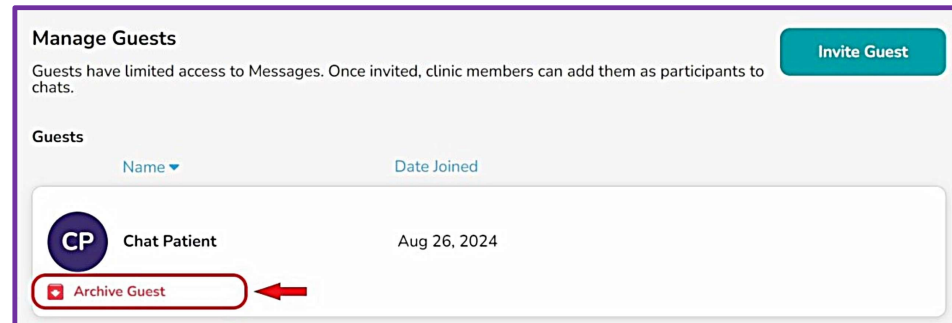
Guests	Invited Guests	Archived Guests
Those who have accepted their invitation to join a message and have created a Lumeca 'Guest' account. Their name will appear in your drop-down list when inviting participants to join your messages.	Those who must still accept their invitation and create a Lumeca account. You have options to 'Resend Invitation' or 'Cancel Invitation', if necessary.	Those archived by you. They: <ul style="list-style-type: none"> - 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

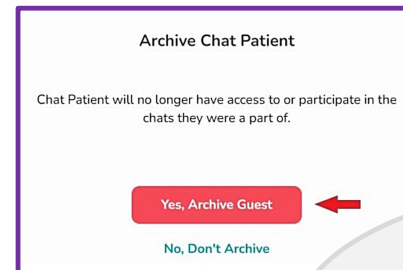
- ❑ Click **'Messages'** on the left navigation bar, then choose **'Manage Guests'**.



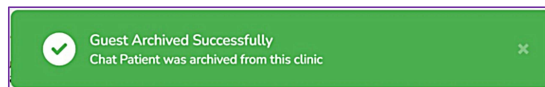
- ❑ Locate the guest you wish to archive, then click **'Archive Guest'** beneath their name.



- ❑ Confirm by clicking **'Yes, Archive Guest'**.

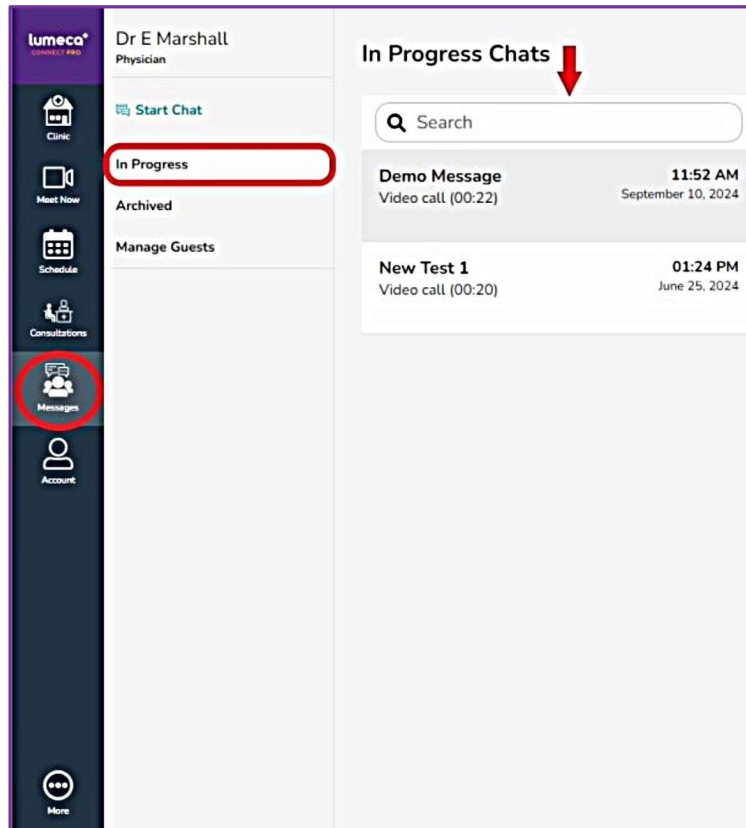


- ❑ A green banner will confirm that your guest has been archived successfully and the guest's name will appear under **'Archived Guests'**.



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.

The screenshot shows the 'Start Chat' interface. At the top, there is a 'Messages' icon and a 'Start Chat' button. Below this, there is a 'Title*' field with the text 'Demo Message' and a 'Next' button. The 'Add Participants' section is below that, showing a search bar and a list of participants. The 'Selected Participants' section shows the selected participants: DGDIs1, Dis3, and Doc1.

Start Chat

Title*
Demo Message

Next
Cancel

Add Participants

Select one or more participants from the list. If the participant is not listed, they need to be invited to the clinic before you can add them to chats.

Name
Search

Hide Filters

Selected Participants: None

Participant	Location	Job Title	Role
<input type="checkbox"/> DGDIs1 DGDIs1 manutent1971+dgdis1	Winter Lind 75	Message	Dispatcher
<input type="checkbox"/> DGDIs2 DGDIs2 manutent1971+dgdis2	Wonderland Go	Dispatcher	
<input type="checkbox"/> Dis3 Dis3 manutent1971+dgdis3	Wonderland Go	Dispatcher - EMT	
<input type="checkbox"/> Doc Reidy Doctor Reid	Reid Demo	Family Physician	
<input type="checkbox"/> Doc1 Doc1 manutent1971+DOV1	Wonderland DV1	Family Physician	
	Wonderland DV2	Message	Family Physician


31 to 35 of 174 Participants

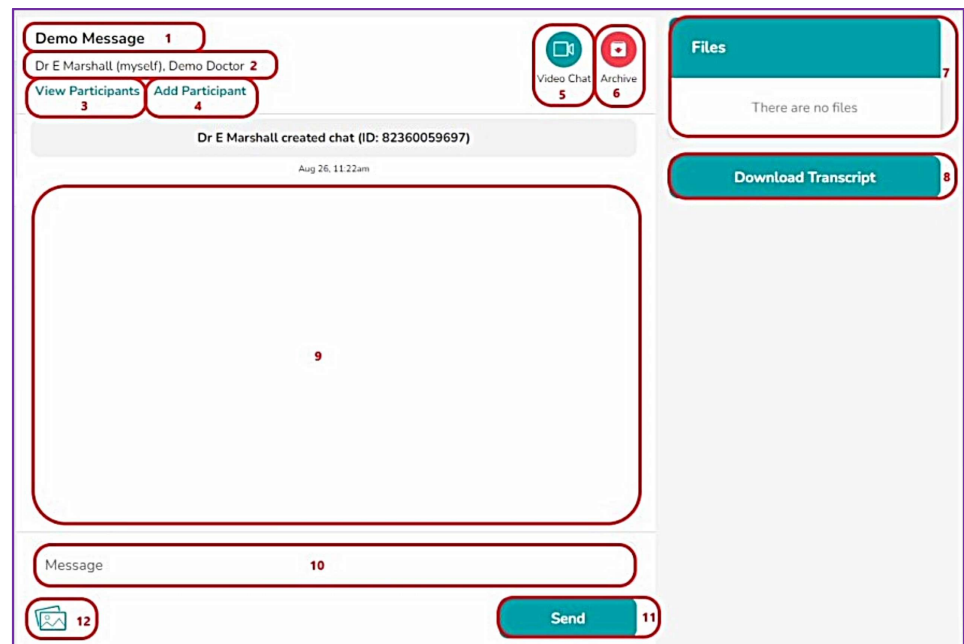
Previous 1 2 3 4 5 6 7 8 9 10 25 Next

Selected Participants: DGDIs1 x Dis3 x Doc1 x

Start Chat
Cancel

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.  - 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.

Demo Chat
Demo Doctor 1 (myself), Demo Doctor
[View Participants](#) [Add Participant](#) Video Chat Archive
Demo Doctor 1 created chat (ID: 68084070057)
Aug 26, 3:21pm

Add Participants
Select one or more participants from the list. If the participant is not listed, they need to be invited to the clinic before you can add them to chats.

Name Search [Hide Filters](#)

Clinic Location Job Title Role
Select option Select option Select option Select option

Selected Participants: None

<input checked="" type="checkbox"/>	DGDIs1 manutest1971+dgdIs1	Winter Land 75 Mississauga Nurse	Wonderland Go Dispatcher
<input checked="" type="checkbox"/>	DGDIs2 manutest1971+dgdIs2	Wonderland Go Dispatcher	
<input checked="" type="checkbox"/>	Dis3 Dis3 manutest1971+dgdIs3	Wonderland Go Dispatcher - EMT	
<input type="checkbox"/>	Doc Baldey Doctor Reid	Road Demo Rogina Family Physician	
<input checked="" type="checkbox"/>	Doc1 Doc1 manutest1971+DDV1	Wonderland DV1 Toronto Family Physician	Wonderland DV2 Mississauga Family Physician


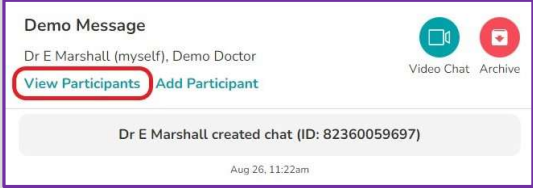


31 to 35 of 174 Participants [Previous](#) [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#) [13](#) [14](#) [15](#) [Next](#)

Selected Participants: DGDIs1 x Dis3 x Doc1 x



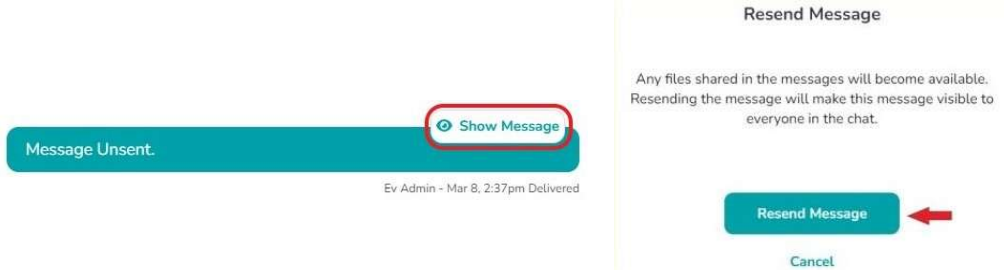
Add Participants

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

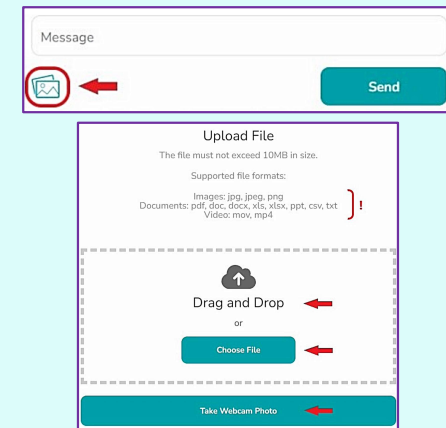
<p>Send a chat message:</p> <ul style="list-style-type: none"> Type into the 'Message' field, then click 'Send' 	
<p>Unsend a chat message:</p> <ul style="list-style-type: none"> Hover over a message that you have sent and tap 'Unsend Message'. Add a 'Reason', then confirm by clicking 'Unsend Message'. <p>The message will be replaced in the chat window with the words, 'Message Unsent'.</p>	
<p>Resend a chat message:</p> <ul style="list-style-type: none"> Hover over a message that you have hidden and tap 'Show Message'. Confirm by clicking 'Resend Message'. <p>All participants will be able to see the message again in its original location.</p>	

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 Lumecca '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.

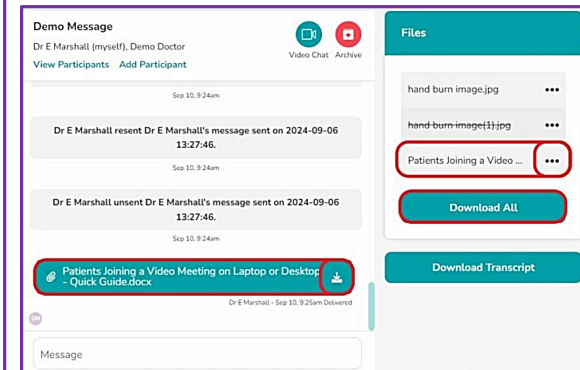
Unsend/Re-send a File

Uploaded files may be unsent or re-sent.

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

Download a File

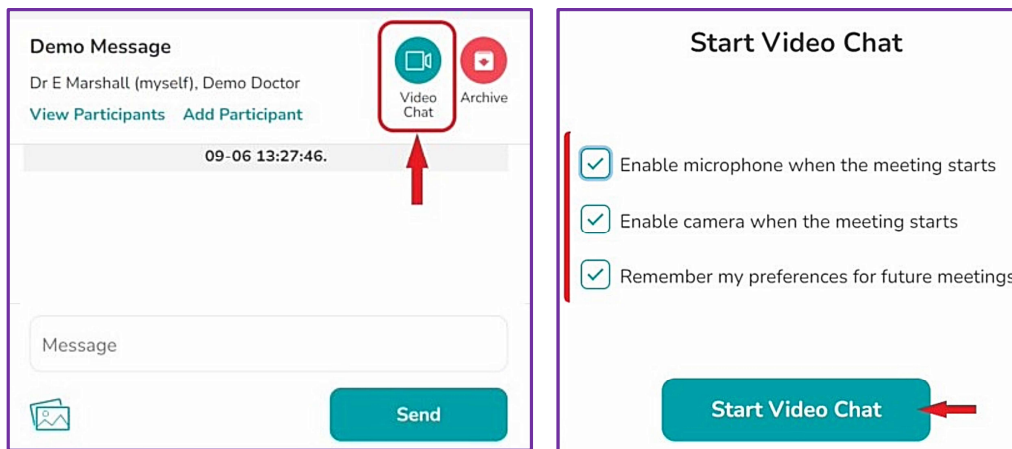
- Click on the file name in the Chat message box, or
- Under 'Files', click on the [...] next to a file name, then 'Download' an individual file, or
- Under 'Files', choose 'Download All' to download multiple attached files. The files will be compressed into a .zip file containing the multiple files, which will need to be 'Extracted'.



Start a Video Call While in a Message

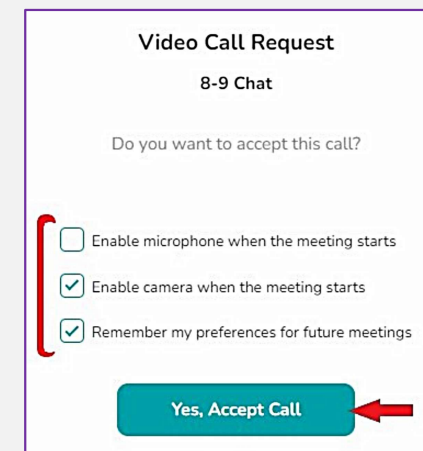
- ❑ When in an active message, click '**Video Chat**'.
- ❑ Check to enable your microphone and camera and to remember your preferences for future video chats. These permissions grant camera and microphone access within the video itself.
- ❑ When ready, click '**Start Video Chat**'.

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

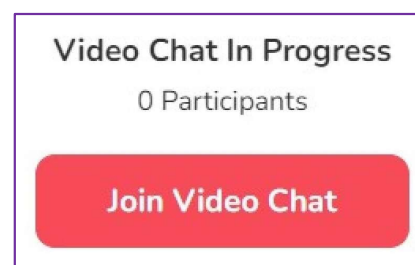
- ❑ Click the red button labelled '**Leave Call**' on the bottom of your screen.

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**'.

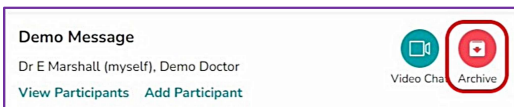


Archive, Find Archived & Unarchive Messages

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.

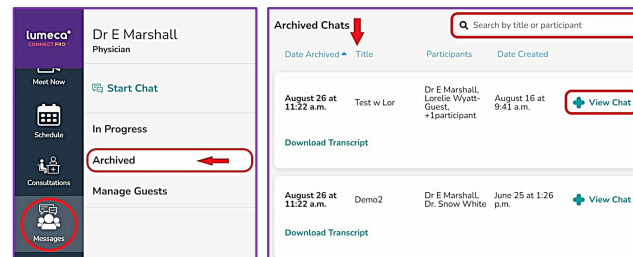
The message will move from 'In Progress' to 'Archived' (under the 'Messages' tab).

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.

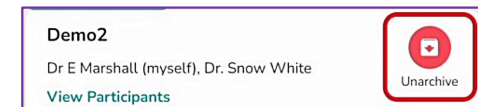
When archived, changes cannot be made to a message however, files uploaded within the message may be accessed.

•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>