Clinic User Guide

Last Update May 2026

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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 hyperlink
  - '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 Health’ as a Clinic 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**
  - Use this link to send us a message, *https://www.lumeca.com/request-demo*

- 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** 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

You should 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** (this link is the connection between your account and the clinic), then select **I Have an Account**.
- ❑ Log in with the username and password you used to create your account.
- ❑ You will then be joined with the additional clinic.

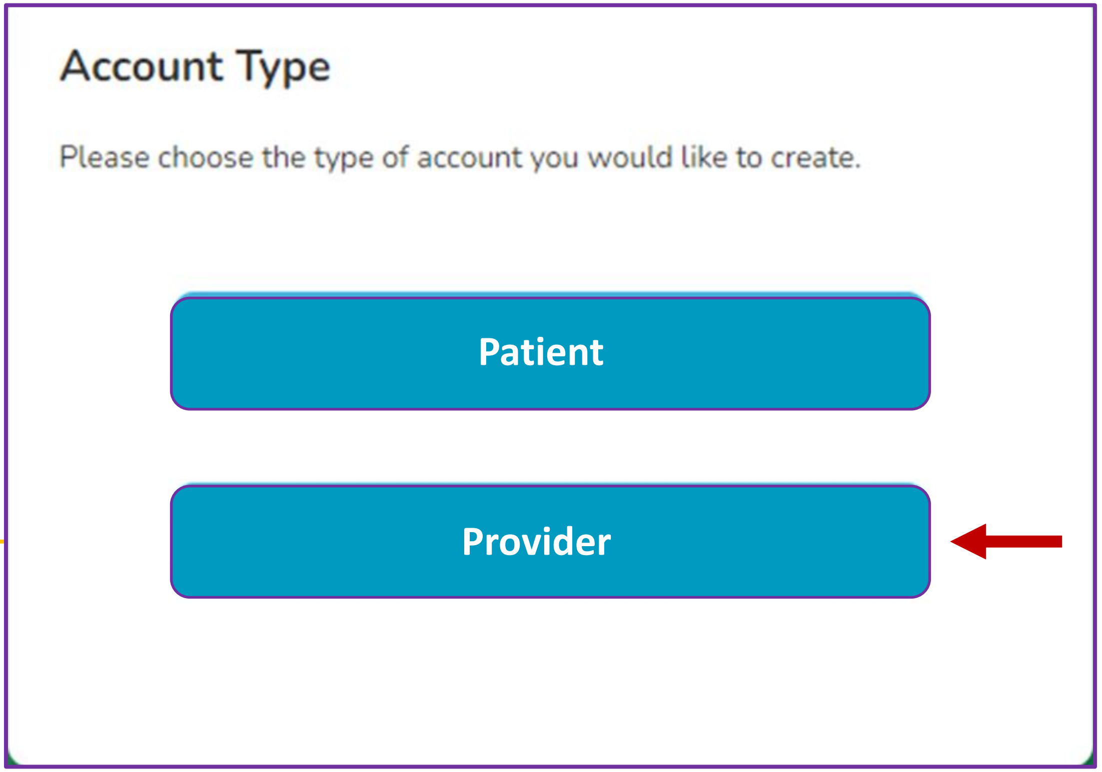
CREATE A 'PROVIDER' ACCOUNT

In some rare instances you may be presented with a screen asking you what kind of account you want to create – Patient or Provider.

If you see this screen...

- ❑ Click **Provider** and you will be redirected.

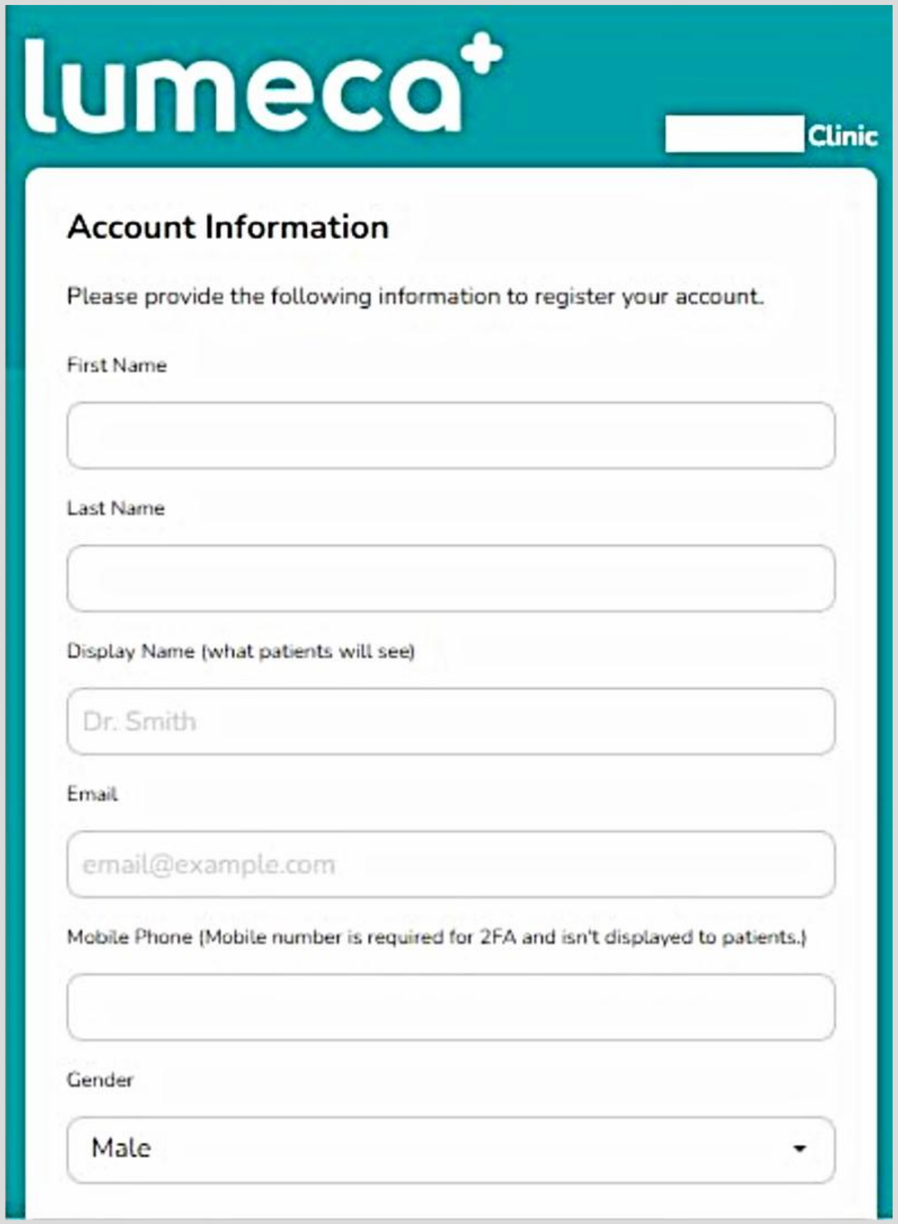
(DO NOT click **Patient**)



ACCOUNT INFORMATION

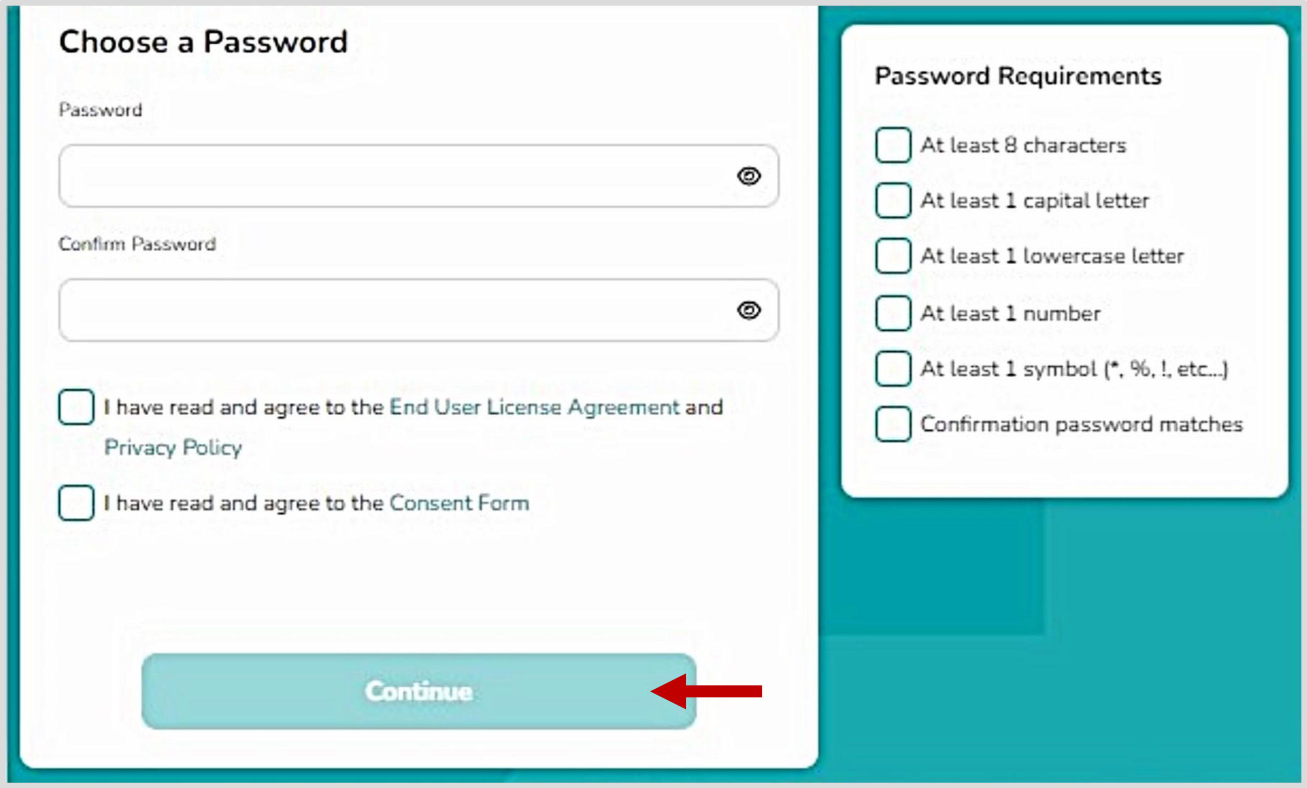
❑ Enter **your** account information

- **All fields are mandatory**
- **Display Name** is the name visible to your care team and patients on 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, 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.*



CHOOSE A PASSWORD

- ❑ Create a secure password. As the password requirements are met, checkmarks will automatically appear for each of them. ☑
- ❑ Read and agree to the **End User License Agreement** and **Privacy Policy** by adding a checkmark ☑
- ❑ Click **Continue**



YOU ARE NOW READY TO ACCESS YOUR CLINIC !

- ❑ Click **Go To Your Clinic**

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

To access the Login screen, go to...

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

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

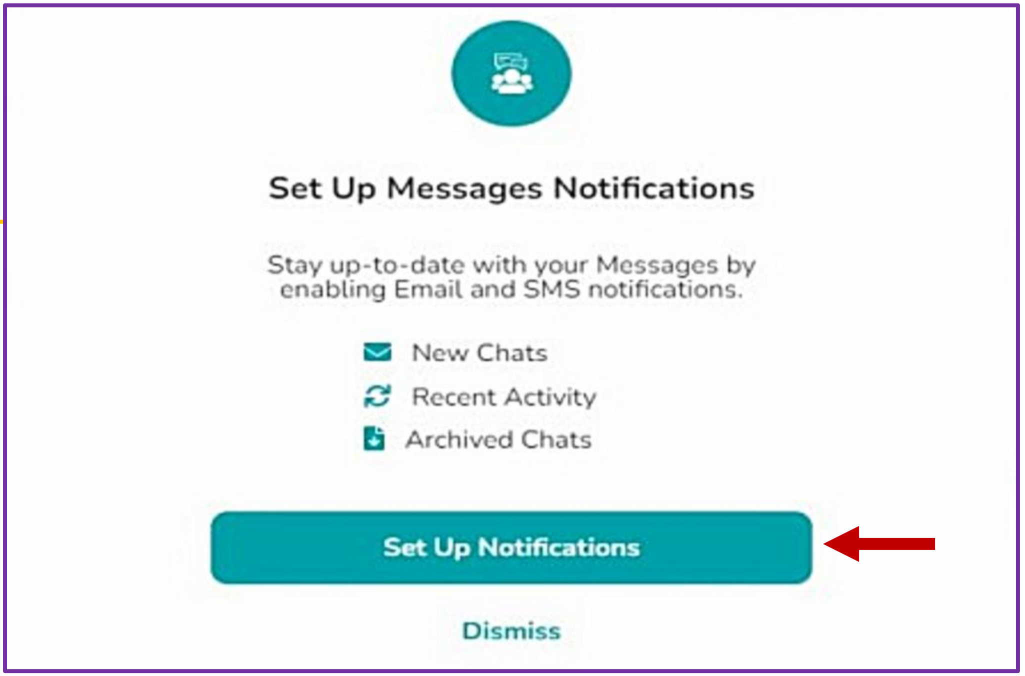
SET UP ‘MESSAGE’ NOTIFICATIONS

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 the message. These conversations operate independently and are distinct from virtual meetings or patient consultations.

This step is recommended so you are informed when:

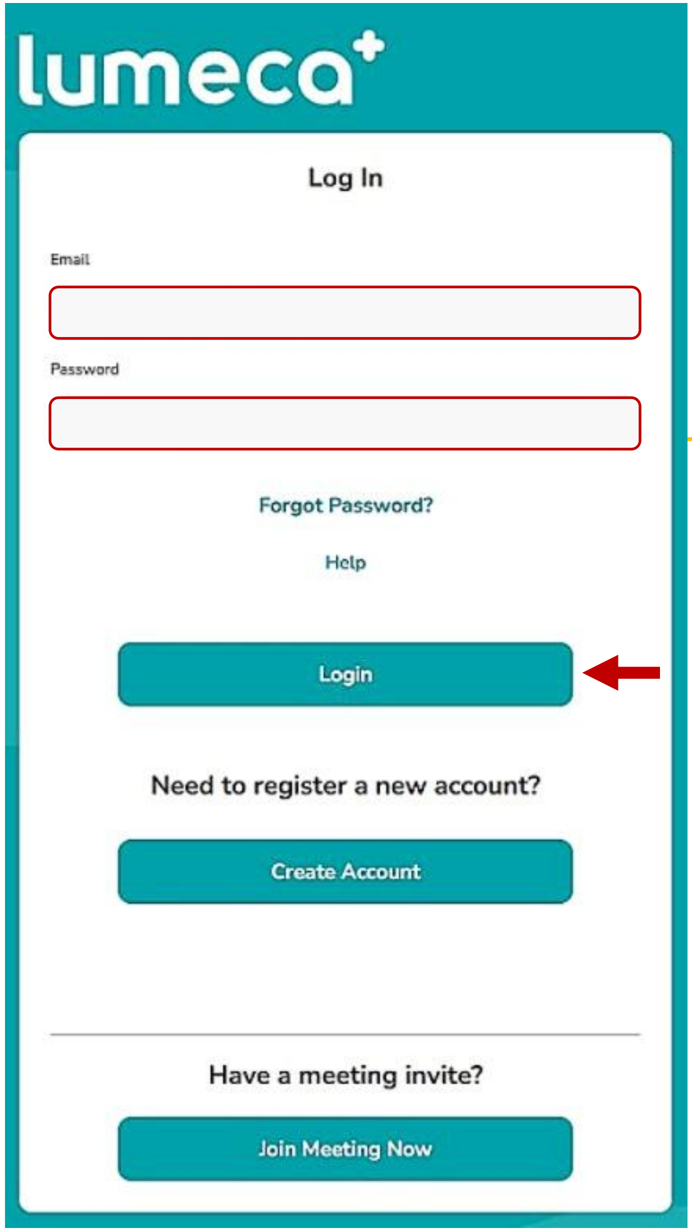
- You are invited to new chats
- There is message activity
- Chats you are a part of are archived

After creating your account, you will be prompted to **Set Up Messages 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 Messages, Patient Consultations and Appointments you are invited to as a participant.
- Section 8 below provides more information on Notifications.

3. Account Login & Logout



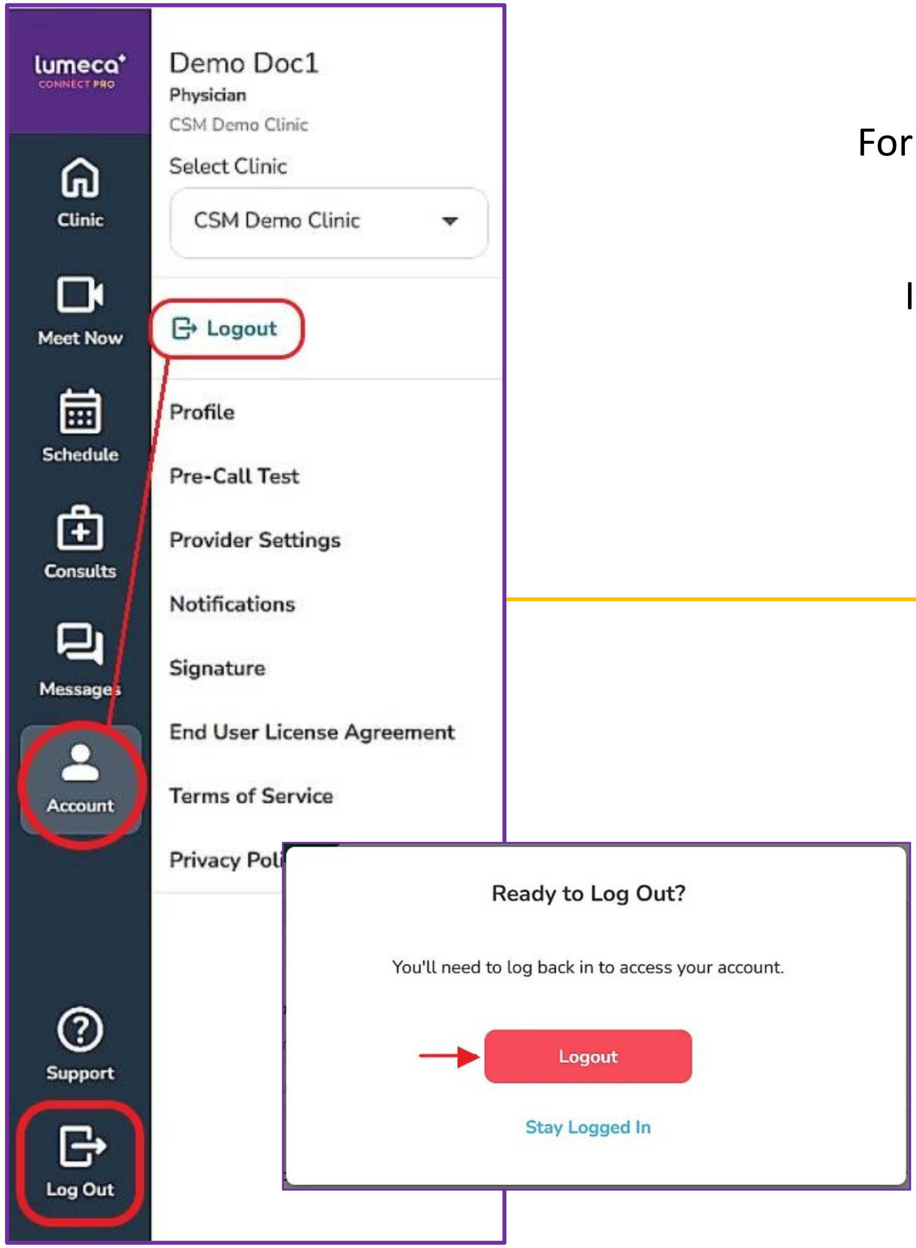
ACCOUNT LOGIN

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

REMEMBER TO BOOKMARK THIS LOGIN PAGE FOR EASY ACCESS

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

ACCOUNT LOGOUT



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

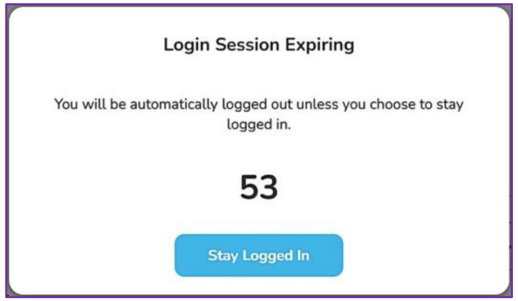
It is also advisable to clear your history at the end of each shift.

There are two areas you can Logout:

- ❑ Under **Account** > **Logout**
- ❑ The bottom of the dashboard > **Logout**
- ❑ Then click **Logout** to confirm.

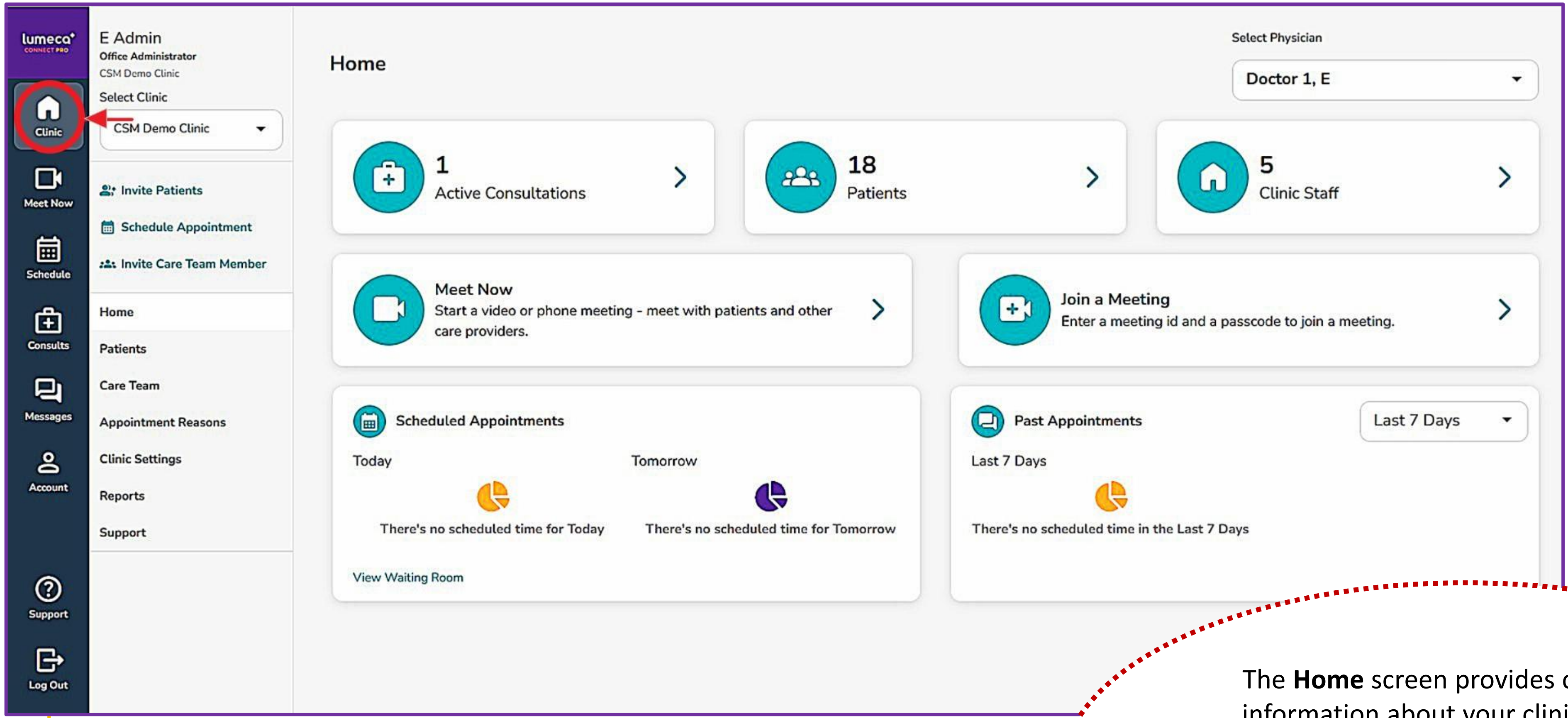
* There is an automatic 1-hour timeout of your account when you close or exit the browser without logging out.

After an hour of inactivity, the system will prompt you to remain logged in or will log you out automatically.



4. The 'Home' Screen

HOME SCREEN



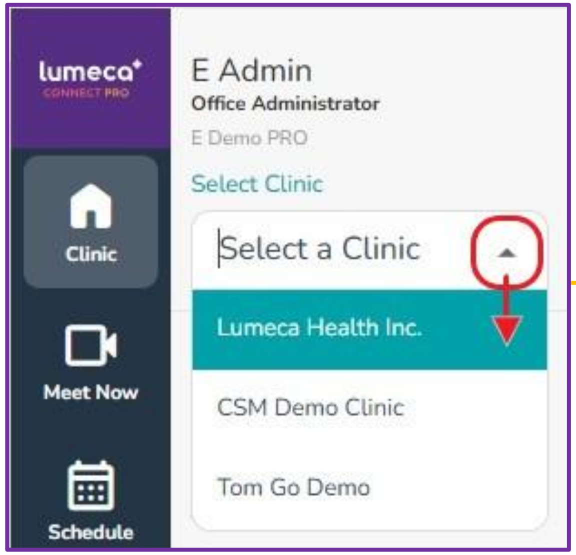
- [ ] To return to the Home screen, at any time, select **Clinic** in the dashboard.

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

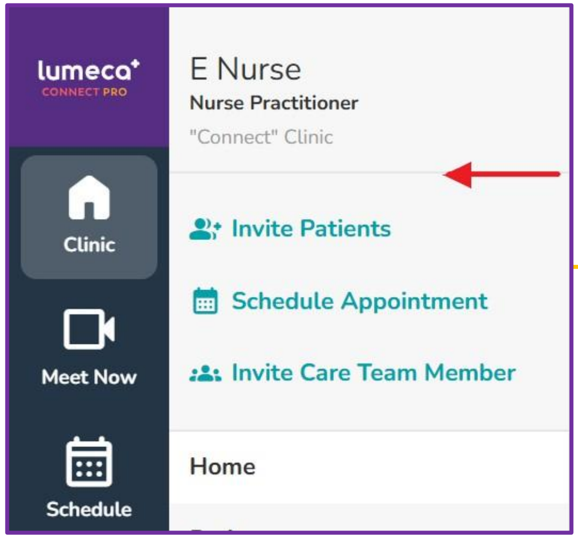
Click on any box that contains an arrow > to be directed to the section.

5. Select a Clinic

SELECT YOUR CLINIC



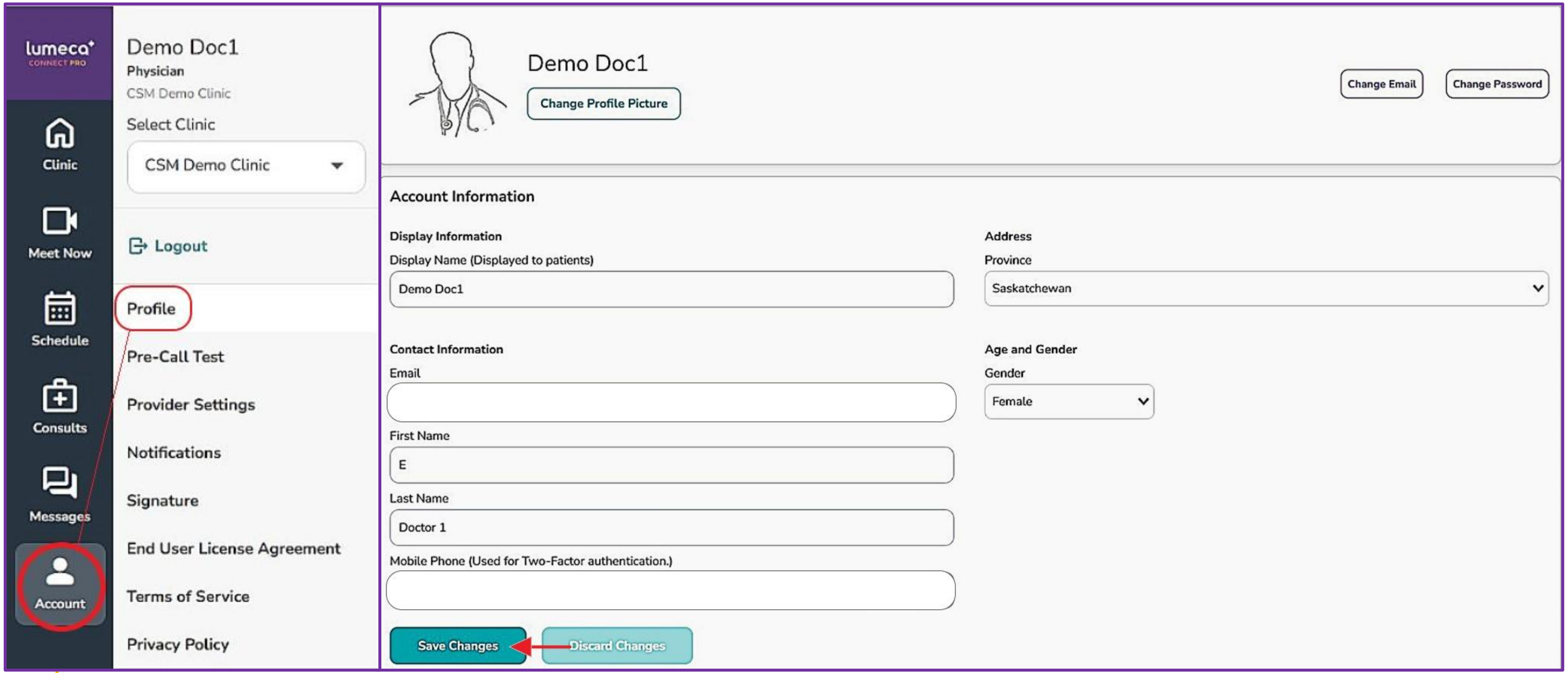
- ❑ If you are part of more than one virtual clinic and have followed the instructions on page 7 of this guide, use the **Select Clinic** drop-down to choose the clinic you are currently working in.



- ❑ If you are associated with one clinic only, you will not see this feature or drop-down.

6. Your Profile Information

YOUR PROFILE INFORMATION



- ❑ Click **Account** in the dashboard, then select **Profile**.
- ❑ If any information is changed or added, click **Save Changes.**

7. The Pre-Call Test

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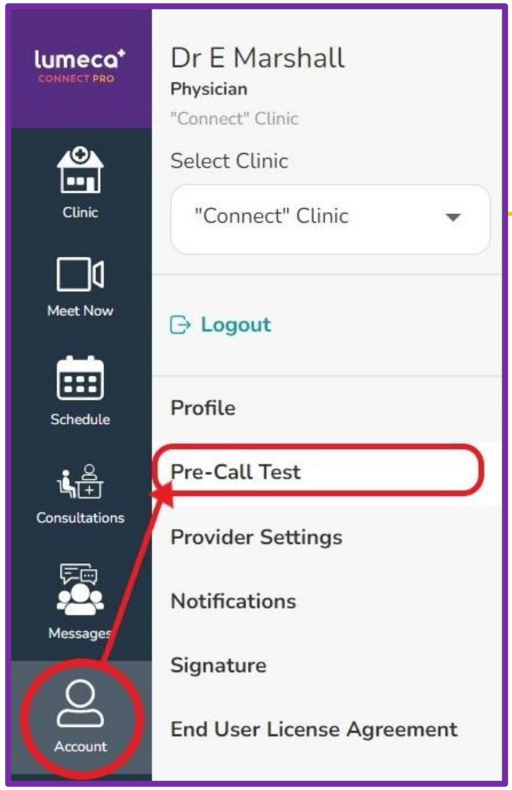
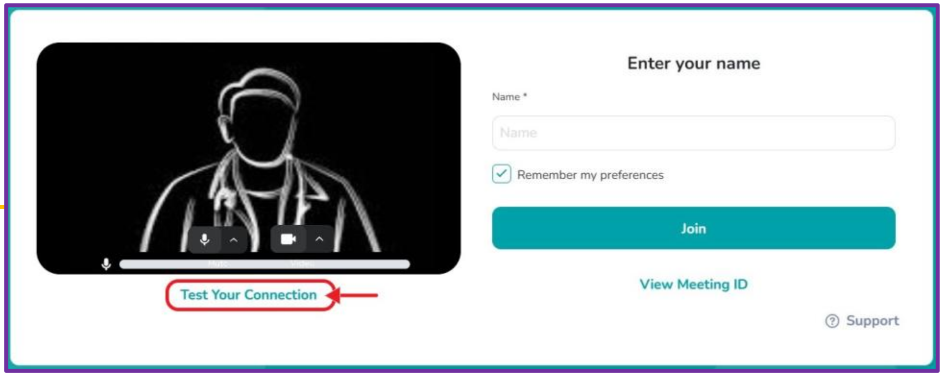
VIRTUAL CLINIC

THE PRE-CALL TEST

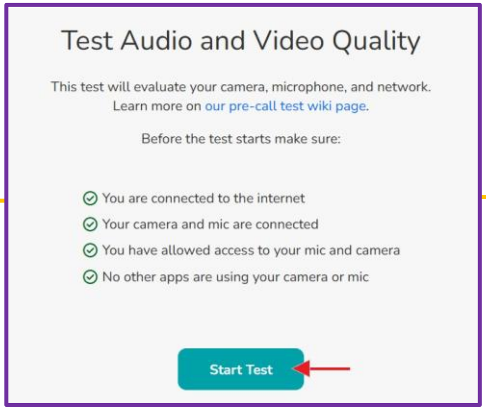
It is recommended that you run a **Pre-Call Test** each time you log into your account, to ensure that your device, camera, microphone and connections are working properly **before** beginning your virtual session(s).

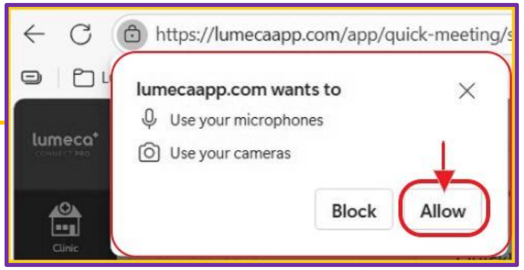


- The **Pre-Call Test** is available from two places in the platform:
  1. Under **Account** in the dashboard, select **Pre-Call Test.**
  2. From the **Join a Meeting** screen (when joining a meeting you are invited to as a participant), select **Test Your Connection.**



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

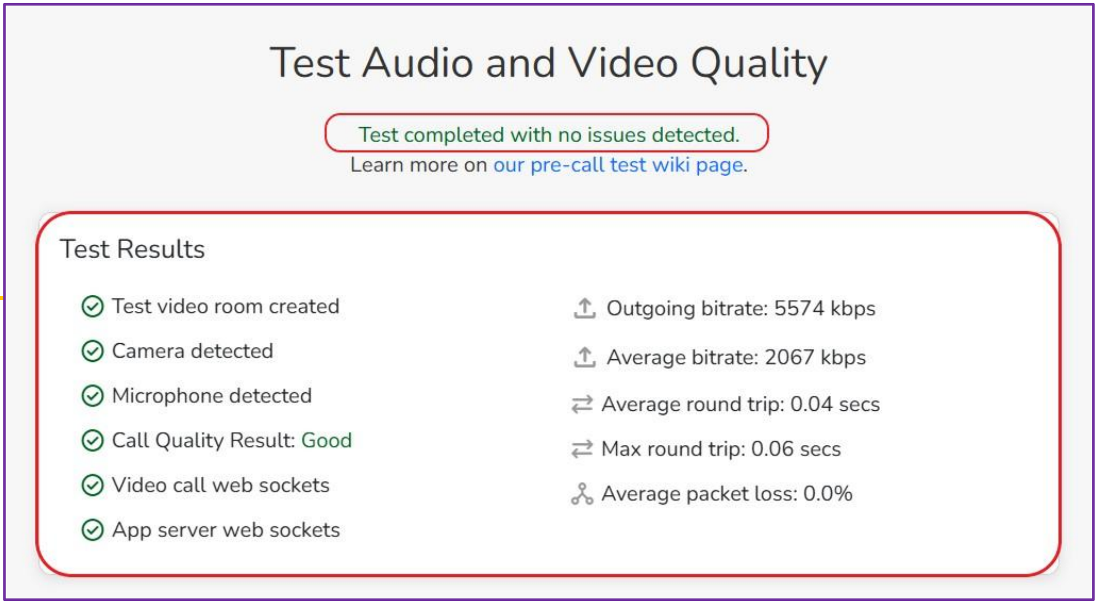




PRE-CALL TEST RESULTS

The test will take approximately one minute, then will time out automatically.

- **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 bad:**
  - Make sure other applications on your laptop/computer are not using your camera or microphone or are closed
  - Double-check your internet connection, as slow speeds can affect the quality of your video sessions
  - 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



Web Sockets - a way for computers to ‘talk’ with each other in real time. It allows two-way communication over one internet connection, so both sides can see, send, and receive information all at the same time.

Packet Loss – incomplete or delayed data transmission.

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.

8. Update Settings & Notifications

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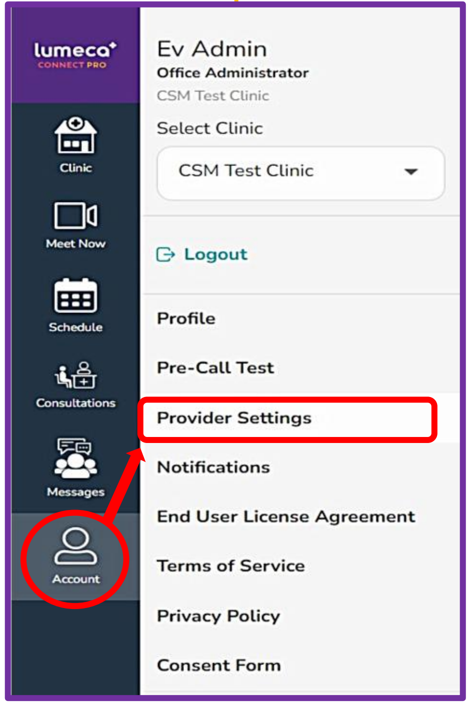
VIRTUAL CLINIC

PROVIDER SETTINGS

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

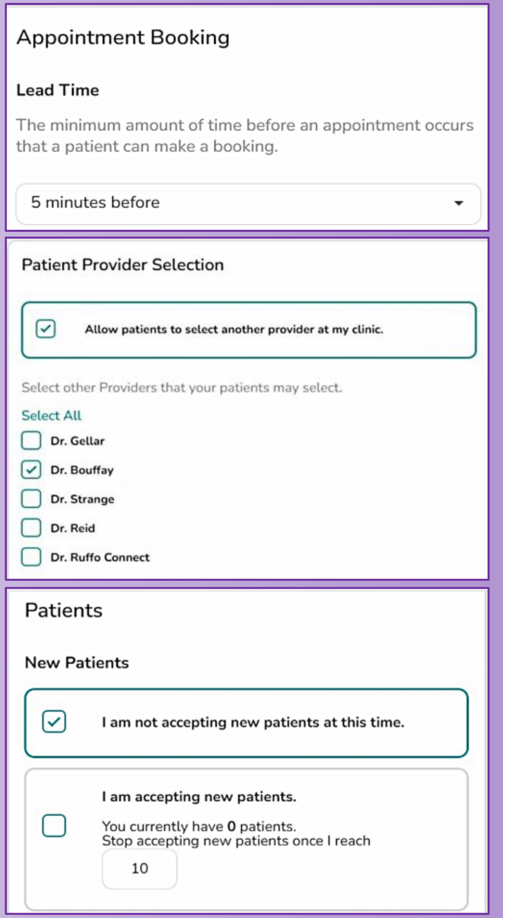
> ⚠ **"Appointment Booking" and "New Patient" settings are unavailable because "Patient Self Serve Scheduling" is disabled.**

- ❑ Select **Account** from the dashboard, then click **Provider Settings**.



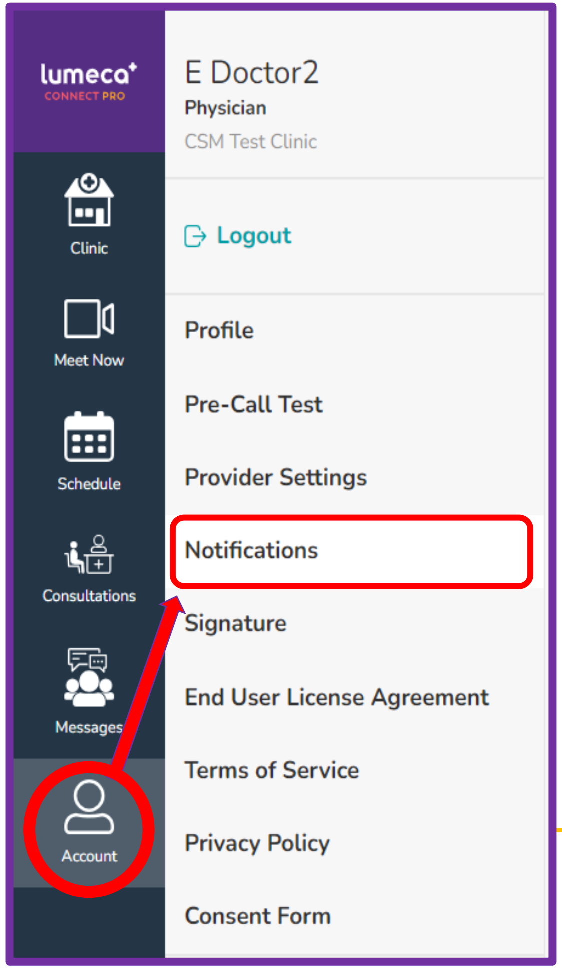
If enabled, there are three settings available:

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



APPOINTMENT NOTIFICATIONS

- Notifications to Clinic Care Team Members -



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

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

Notifications are applied on a per clinic user basis.

Each care team member must set their own appointment notifications.

Notifications can be set for:

Appointments

- Created – when a new appointment is booked with you
- Cancelled – when one of your appointments get cancelled
- Invitation – when you are invited to an appointment by another team member
- Decline – when a team member you invited to an appointment declines

- ❑ Select **Account** from the Dashboard, then click **Notifications**.
- ❑ The clinic admin must select, from the drop-down menu, the healthcare provider they want appointment notifications for. Healthcare providers will not see this drop-down.
- ❑ Check the desired notifications, then click **Save**.

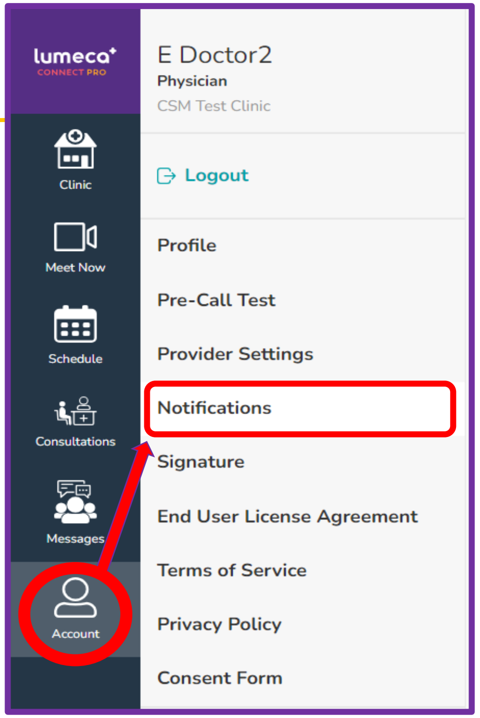
Set up Email & SMS Text Message Notifications

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

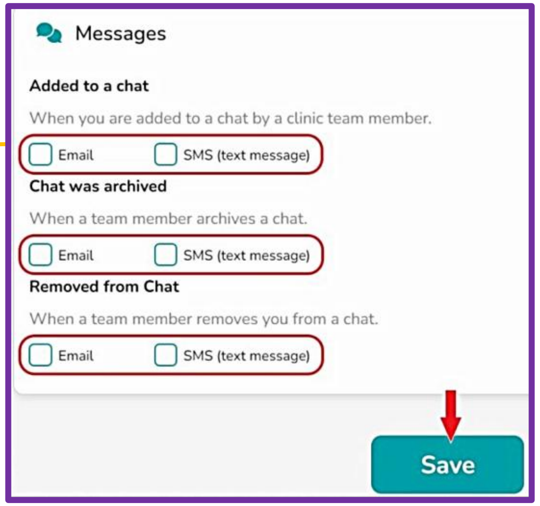
- When you are added to a message
- When a message you are a part of is archived by the message host
- When you are removed from a message

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**.

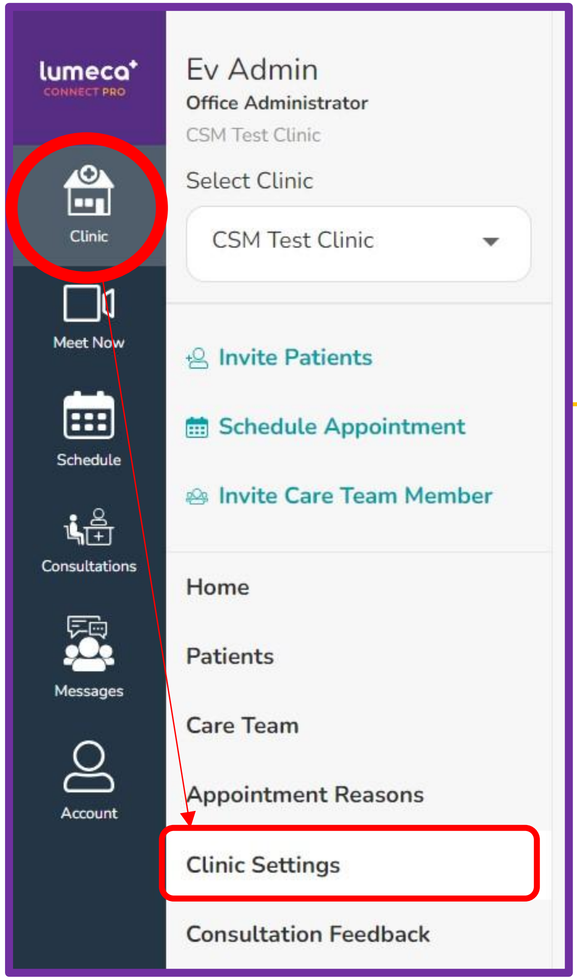


CLINIC SETTINGS

- Appointment Notifications & Reminders to ‘Consultation’ Participants -

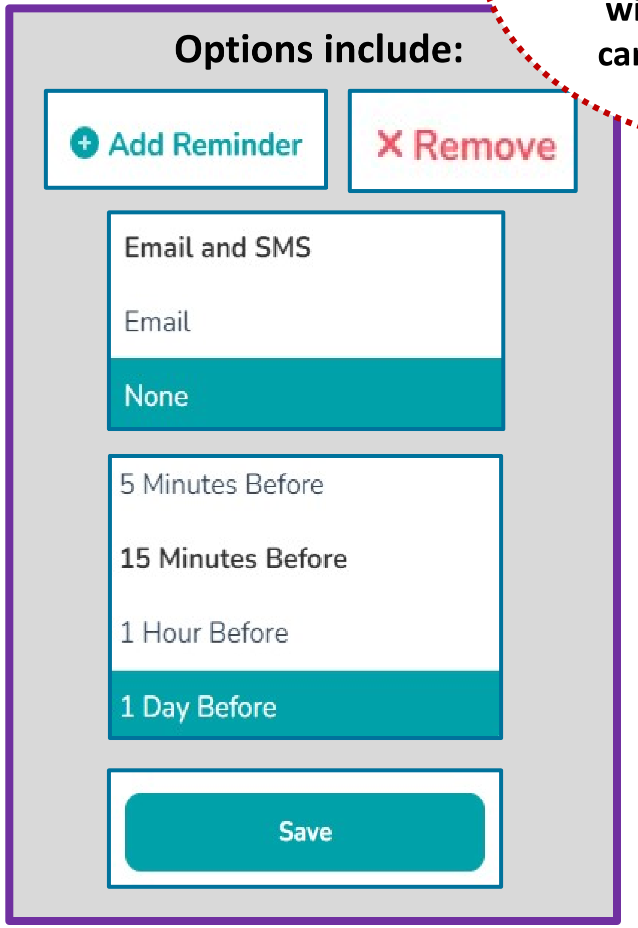
These settings are set for the entire clinic, not for individual users. Any changes will impact all clinic care team members.

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



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

- [ ] Select **Clinic** in the dashboard, then **Clinic Settings**



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.

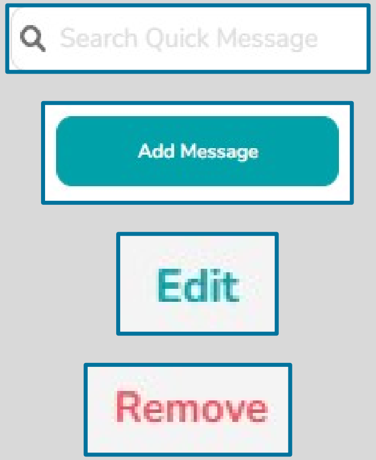
Note: they do not work for video meetings.

They are *accessed* from the **Active & Pending** screen (under the **Consults** tab), however, are *managed* here under **Clinic Settings**.

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

- ❑ Select **Clinic** in the dashboard, then **Clinic Settings.**
- ❑ Scroll down to '**Quick Messages**' to view, edit, remove or add messages.

Options include:

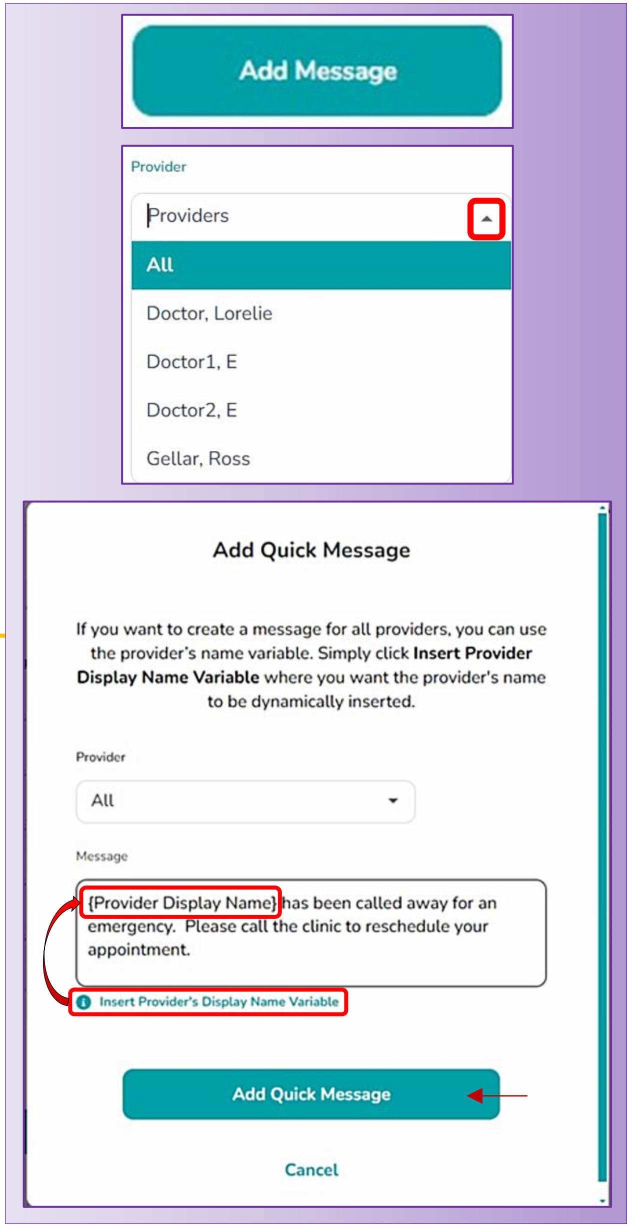


There are preset 'Quick Messages' available OR new ones can be created for the entire clinic OR customized for individual healthcare providers.

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

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 leave blank for 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 spot where you want their name to appear. Type the new message.
- ❑ Click **Add Quick Message.**



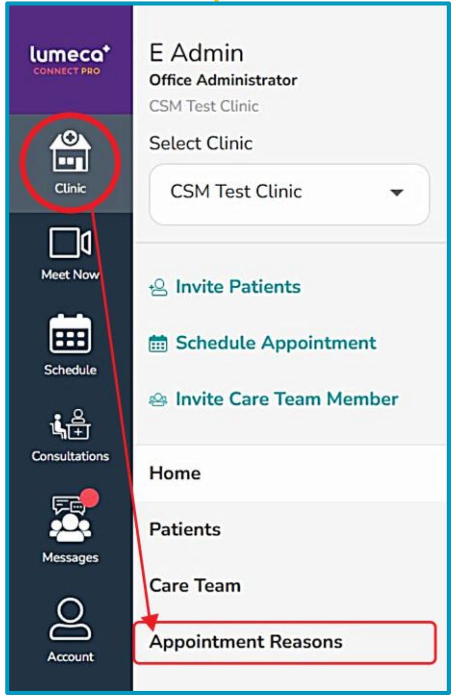
9. Appointment Reasons

MANAGING APPOINTMENT REASONS

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

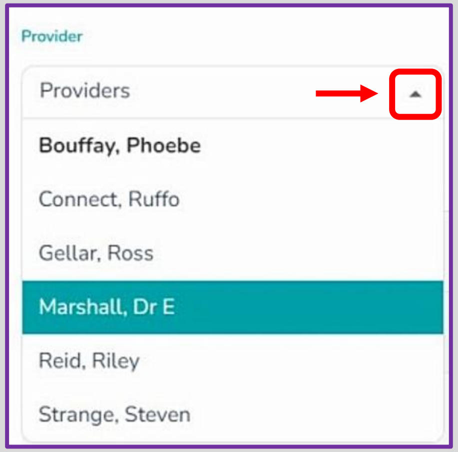
Appointment Reasons are applied on a per clinic user basis and may be set by either healthcare providers or the clinic admin on behalf of the healthcare provider

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

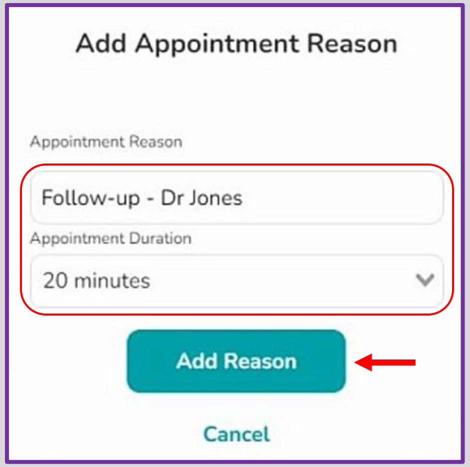


- ❑ Clinic admins must select the correct healthcare provider from the **Provider** drop-down menu.

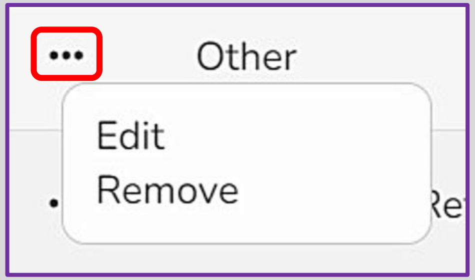
Healthcare providers will not see this drop-down.



- ❑ 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**.



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

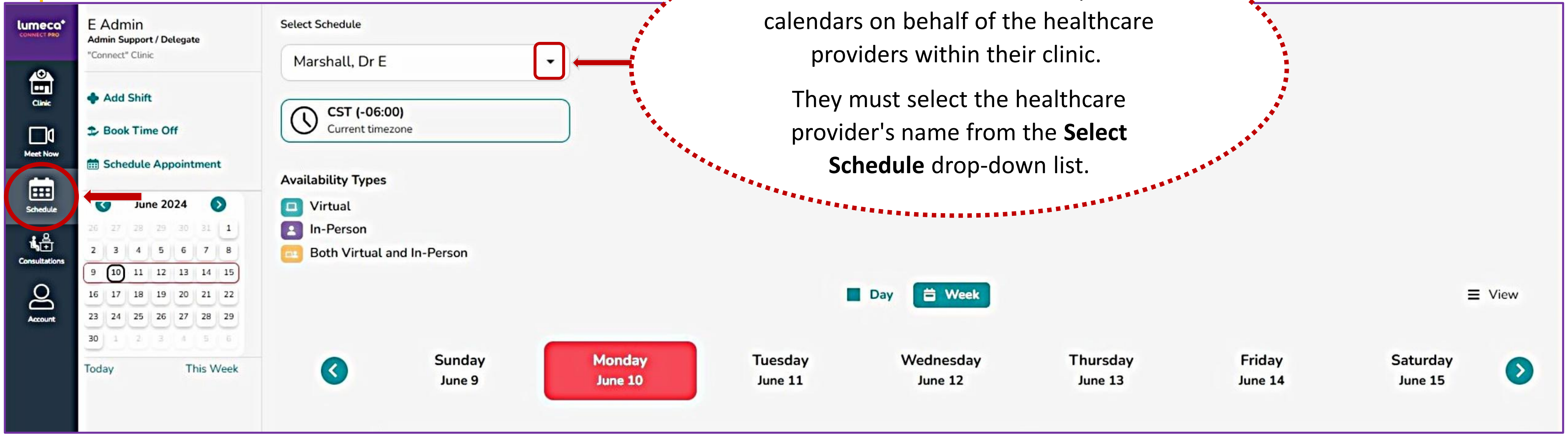


10. Manage the Healthcare Provider's Schedule & Calendar

MANAGING SCHEDULES

A provider's schedule MAY be added into this platform, although not necessary to schedule consultations 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:

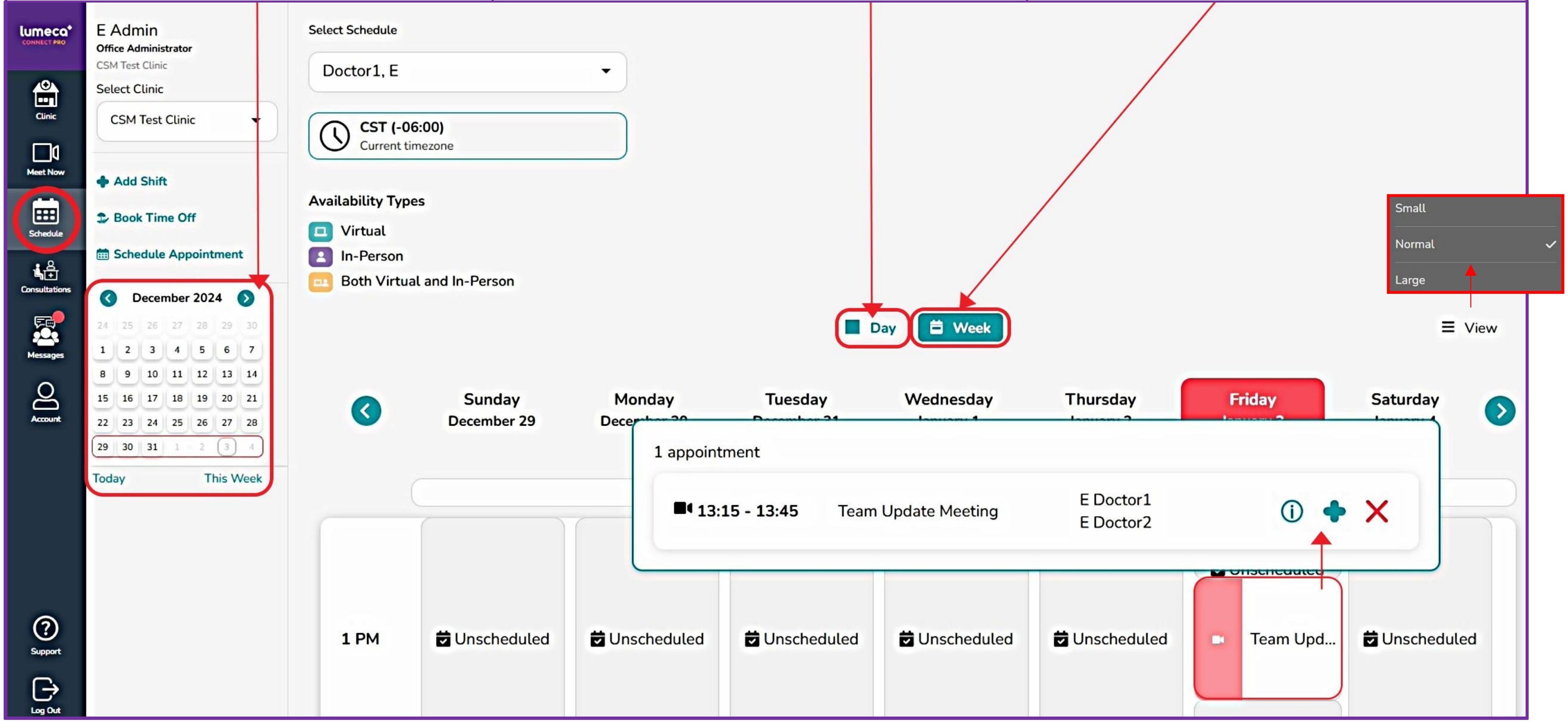
- Click on an individual day or **Today**.
- Click on **This Week**
- Hover over a day to see the number of appointments scheduled.

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.

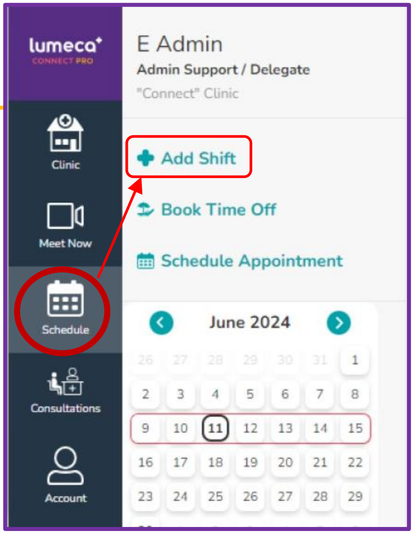
WEEK View:

- 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.

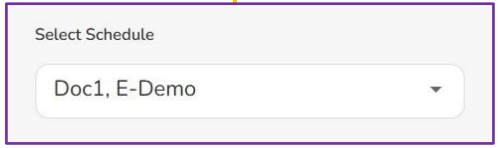


ADD A HEALTHCARE PROVIDER’S SHIFT

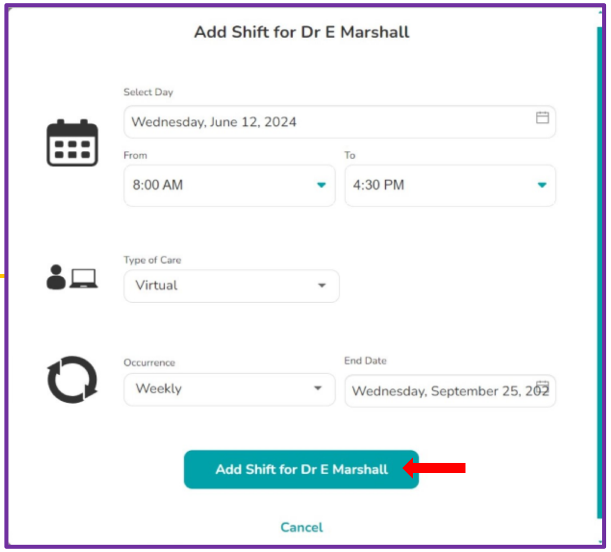
- ❑ Click **Schedule** in the dashboard
- ❑ Select **Add Shift**



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



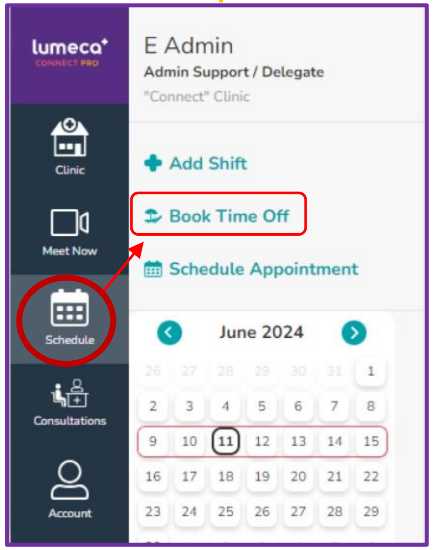
- ❑ Select the **day** you wish to add the shift to
- ❑ Select the from/to **time**
- ❑ Select the **type of care** (virtual, in-person, or both)
- ❑ Choose the **Occurrence**
- ❑ Choose an **end date** (if recurring occurrence)
- ❑ Click **Add Shift for ...**



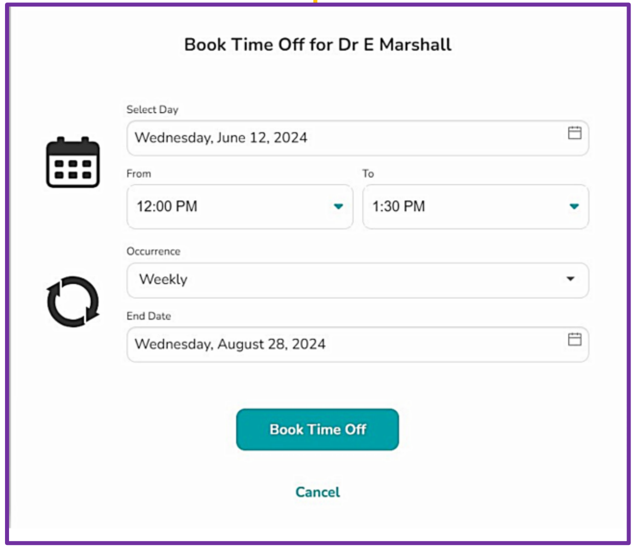
BOOK TIME OFF

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

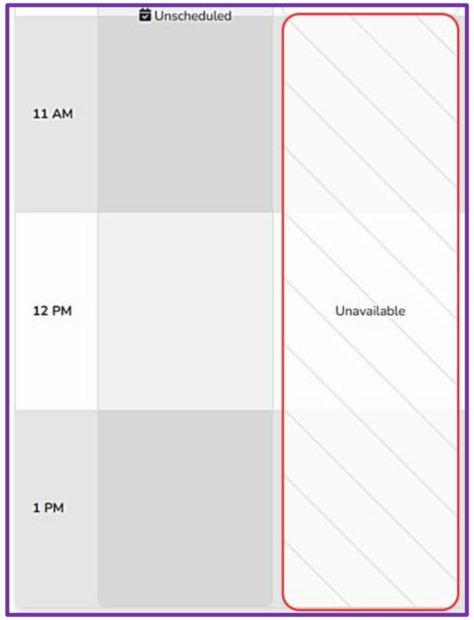
- ❑ Click **Schedule** in the dashboard
- ❑ Select **Book Time Off**



- ❑ 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** to confirm



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



OVERLAPPING APPOINTMENTS

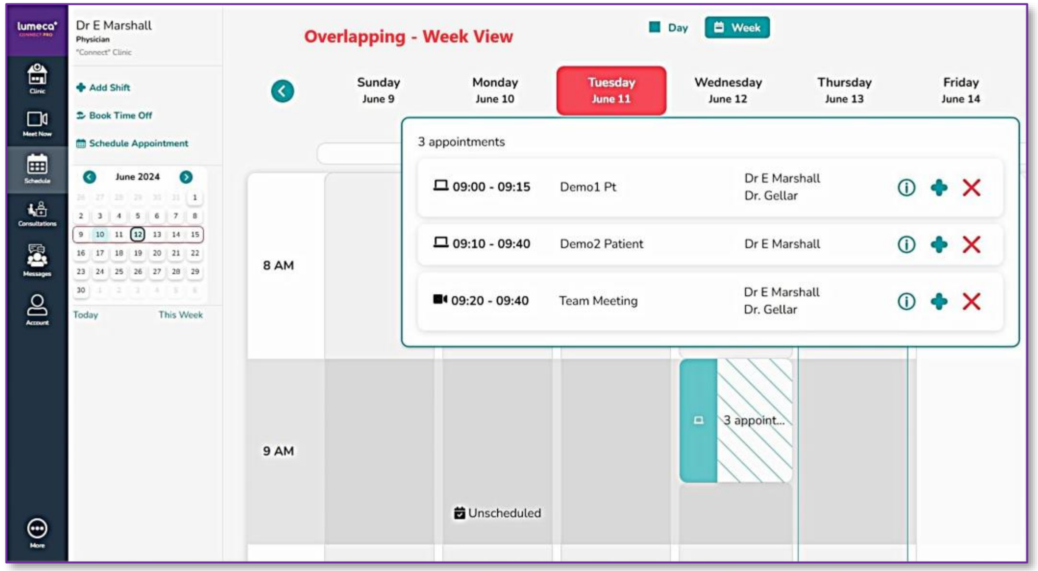
- If scheduled video meetings or consultations overlap with other appointments that a host provider or an invited provider currently has, a notification will appear to the person doing the scheduling (clinic admin or host provider).

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

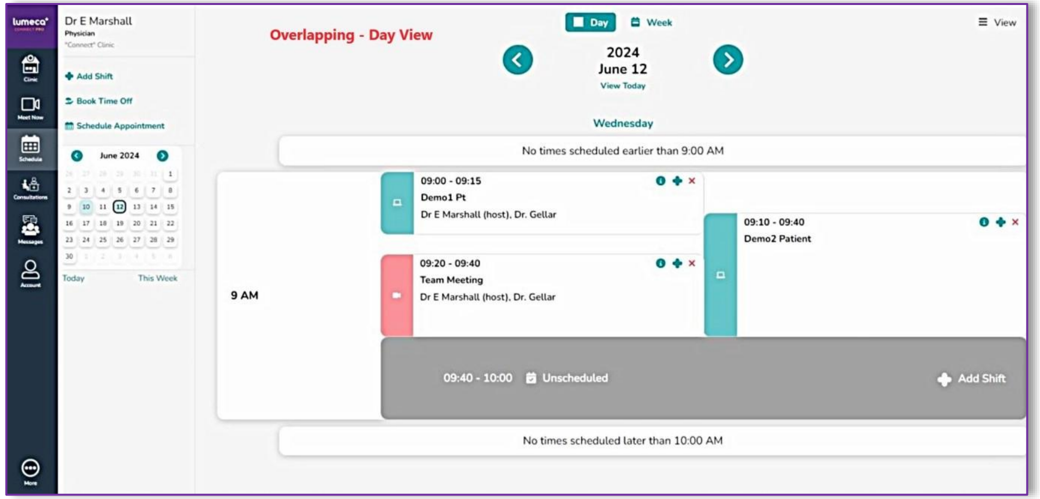
- In **Week View**, the overlapping appointments will show the number of appointments, in a box with a hashed background, within the affected timeslot.

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

Overlapping – Week View



Overlapping – Day View



11. Video Meetings vs Patient Consultations

Video 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.
- They do not need to be invited by the clinic to join the clinic.
- 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.

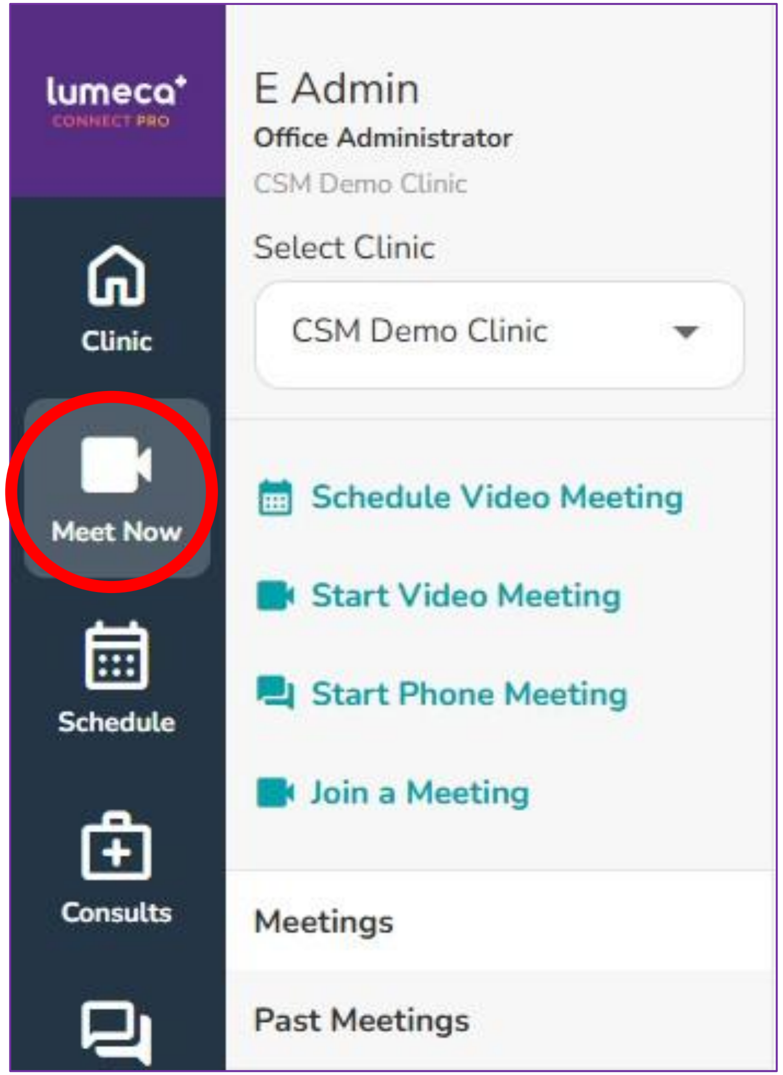
12. Video & Phone Meetings

VIDEO MEETINGS

Under the Meet Now tab in the dashboard, available features include:

1. Schedule a Video Meeting for a later date/time
2. Start an 'On-Demand' Video Meeting
3. Start a Phone Meeting
4. Join a Meeting You are Invited To
5. Past Meetings

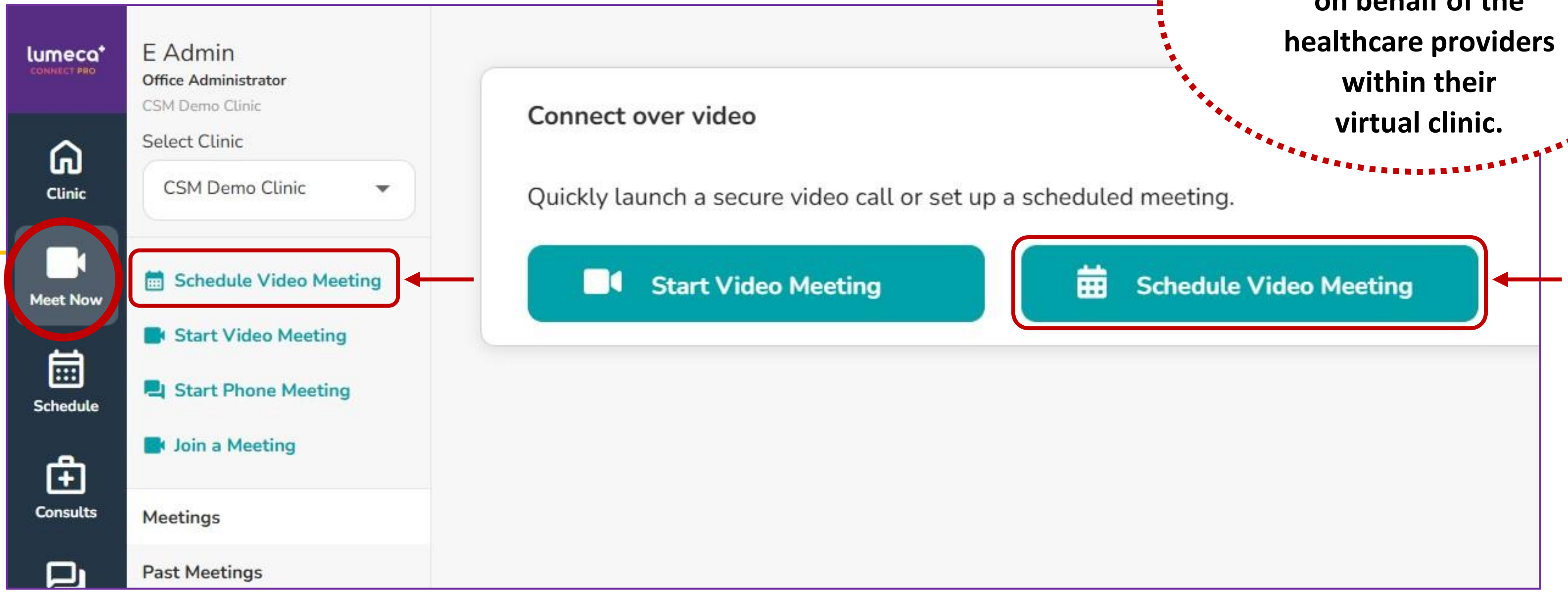
- These meetings allow you to quickly consult with a patient, their family or caregivers, other healthcare providers, specialists or members of your clinic's care team by video or phone, without scheduling a consultation and without your patients/participants requiring an account with **Lumeca**.
- The video meetings do not contain patient, medical history, or past consultation information.
- You may enter a short note once the video meeting is complete for future reference.



1a. Schedule a Video Meeting

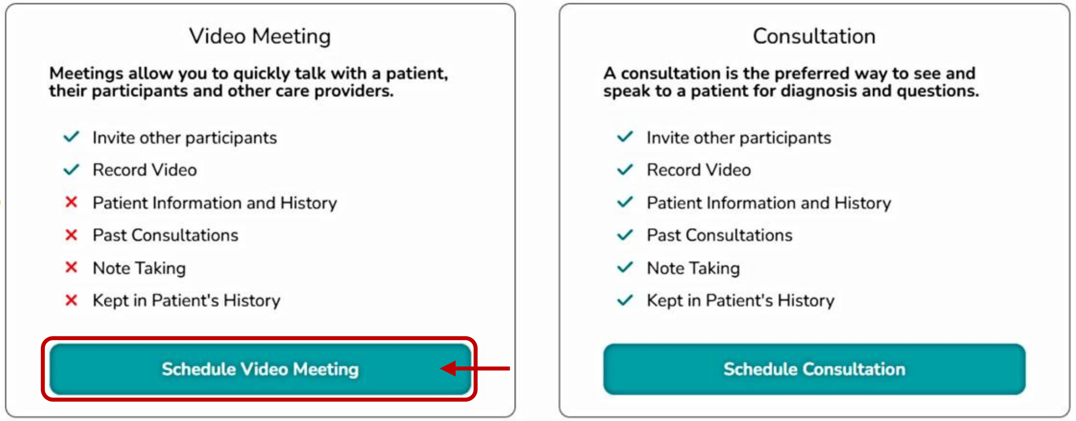
- ❑ Select **Meet Now** in the dashboard
- ❑ Click **Schedule Video Meeting** *

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

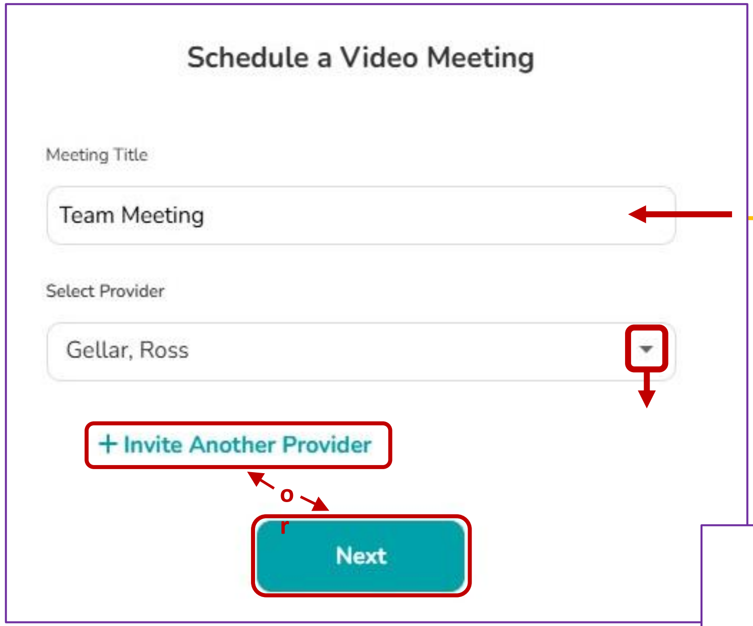


* **Schedule Video Meeting** is also available by clicking **Schedule Appointment** under the **Clinic** tab or **Schedule** tab.

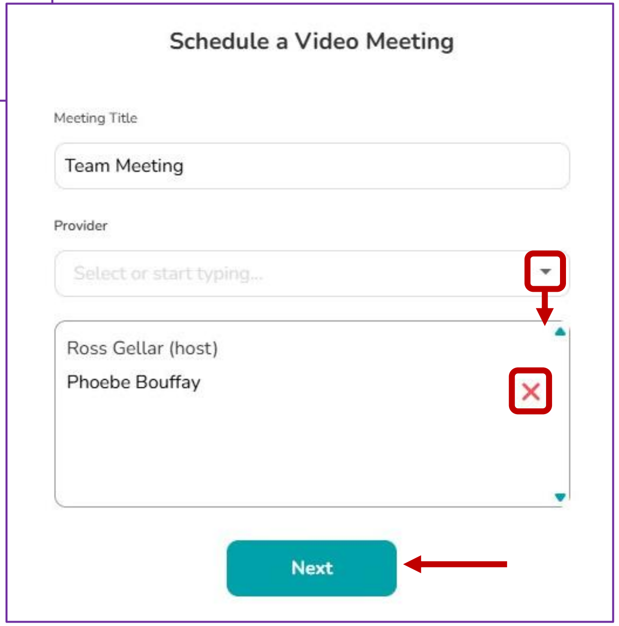
- ❑ If prompted with this screen, click **Schedule Video Meeting**



1b. Schedule a Video Meeting

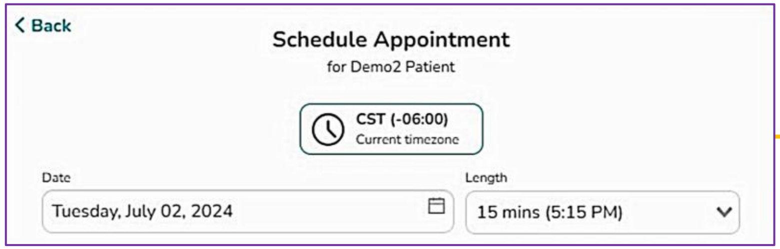


- Enter a **Meeting Title**.
- If you are the clinic admin, select the host provider's name from the **Select Provider** drop-down menu. *Healthcare providers will not see this field.*
- If only a single provider (host) is being scheduled for this meeting, click **Next** and skip to the next page.

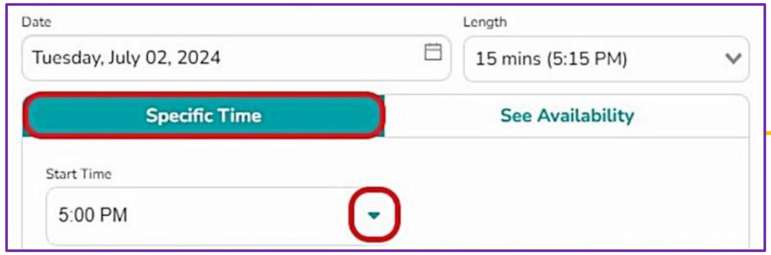


- If providers from your virtual clinic in addition to the host are being invited to this meeting, click **+ Invite Another Provider**.
- Add their name from the **Provider** drop-down menu. If someone is added by mistake, click the red 'X' beside their name, to remove them from the list.
- Once complete, click **Next.**

1c. Schedule a Video Meeting

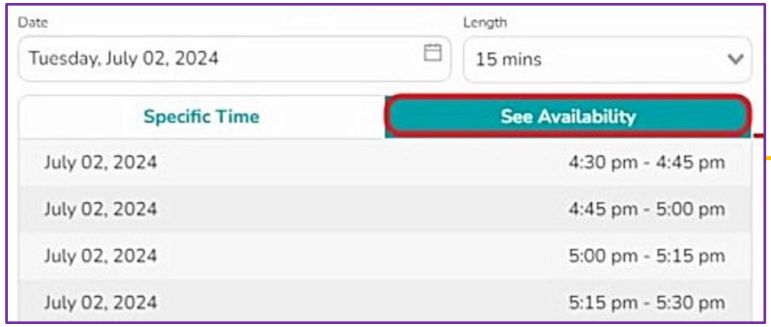


- ❑ **Date** - Enter the date of the meeting or, if scheduling recurring meetings, the first meeting date.
- ❑ **Length** - the length of the meeting (this is approximate; the appointment will not automatically end if it extends past this time).



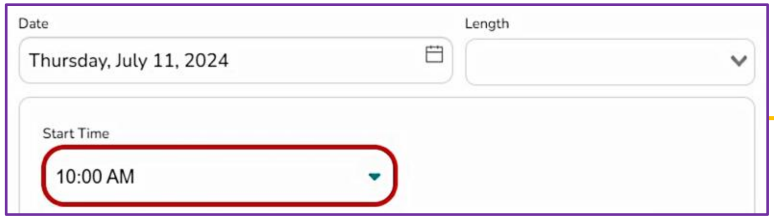
When scheduling <u>a single provider</u> and their work schedules **ARE NOT** entered in Lumeca...

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



When scheduling <u>a single provider</u> and their work schedules **ARE** entered in Lumeca ...

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



When scheduling <u>multiple providers</u> from the same virtual clinic, in addition to the host ...

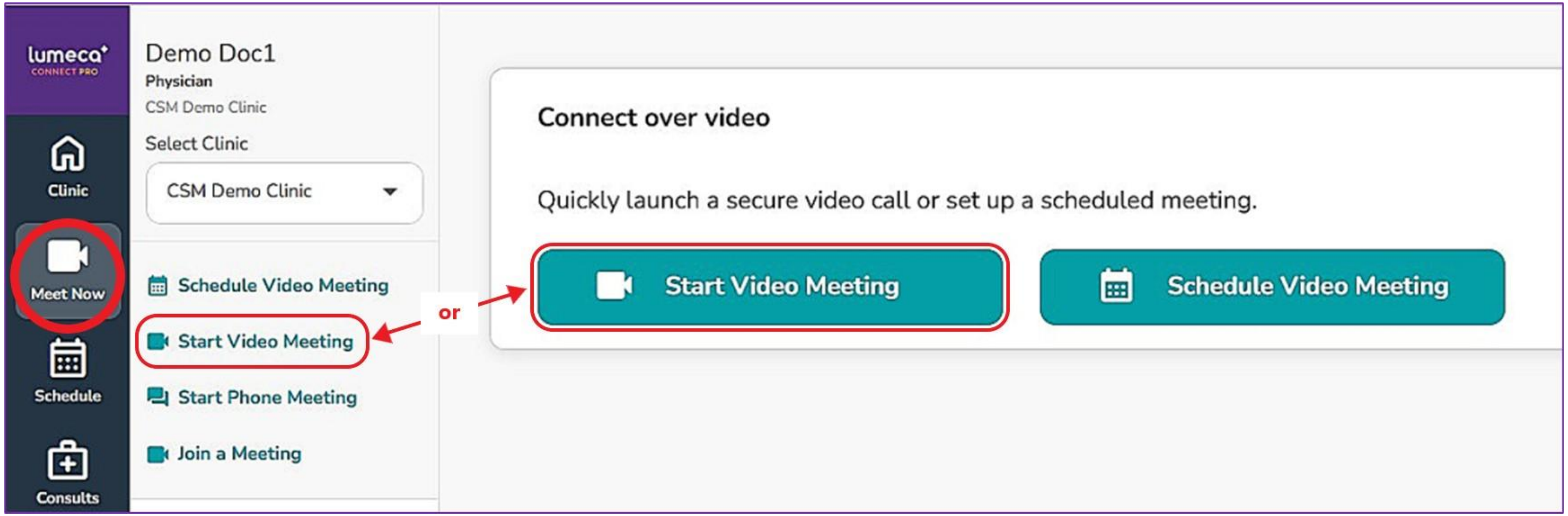
- ❑ Select a meeting **Start Time** from the drop-down

1d. Schedule a Video Meeting - ‘Occurrence'

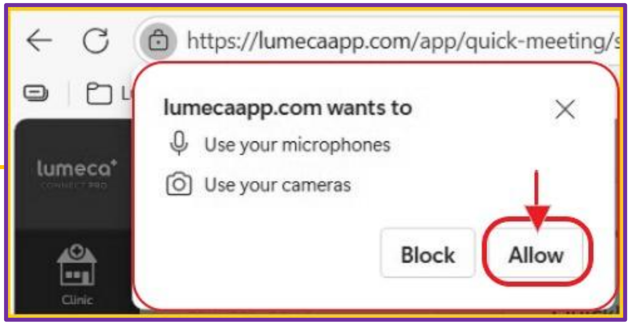
If scheduling a <u>one-time</u> meeting, select **No Repeat**.	Repeat No Repeat
If scheduling <u>recurring</u> meetings, **choose the occurrence**: ▪ Daily – occurs every day, Monday thru Sunday ▪ Weekly – any day of the week, Monday thru Sunday ▪ Monthly – any day of the month OR the ordinal of a weekday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

2a. Start an ‘On-Demand’ Video Meeting

- Initiate Video Meeting & Allow Microphone/Camera -



- ❑ Select **Meet Now** in the dashboard
- ❑ Click **Start Video Meeting**
- ❑ <u>Whenever prompted</u>, **Allow** your camera and microphone



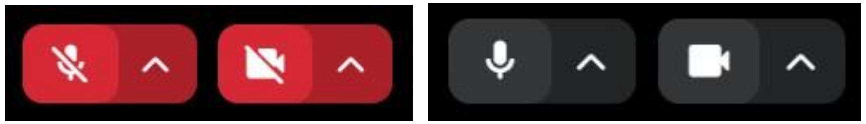
2b. Start an 'On-Demand' Video Meeting

- Camera & Microphone Permissions for Video Session / Test Your Connection -
(Camera & microphone may also be turned off/on in video)

You will see a preview of your video and audio. You may:

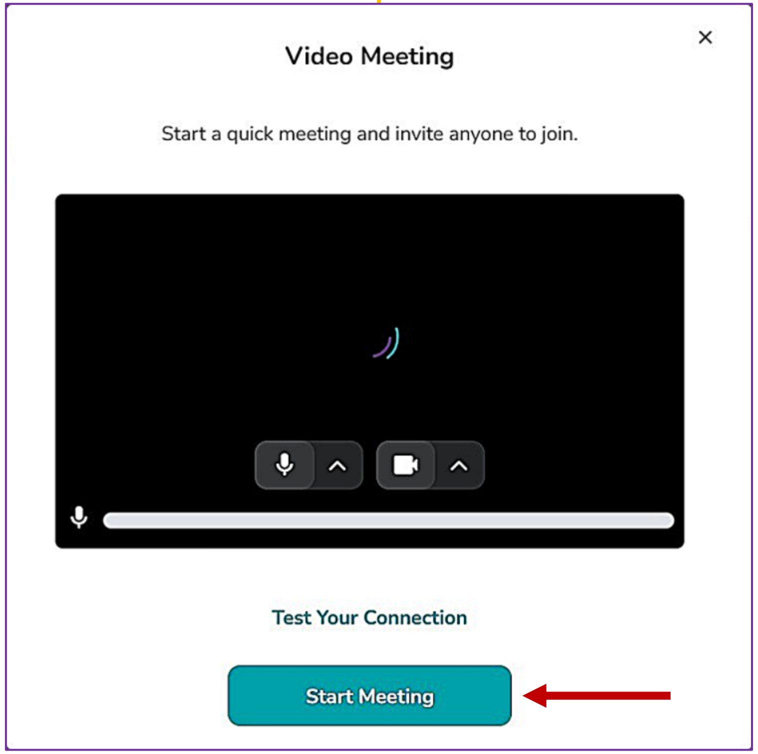
- ❑ Change your microphone or camera

- ❑ Turn your microphone or camera OFF or ON



- ❑ Test Your Connection, camera & microphone

- ❑ When ready, click **Start Meeting**

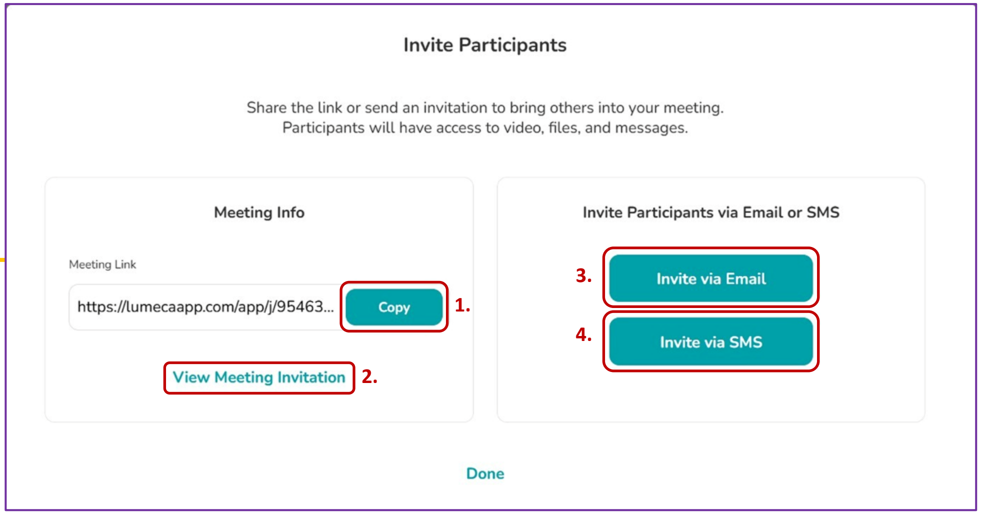


2c. Start an ‘0n-Demand’ Video Meeting

- Send the Meeting URL, ID & Passcode to Patients/Participants -

Invite your patient/guests to join the meeting

- ❑ Choose one of the three options available to send to your participants



1. **Copy** - The copied information includes the web URL link ('*https...*') only, which you must 'paste' into the body of any email platform you choose to use.

2. **View Meeting Invitation** - opens a screen that displays all the meeting information (web URL link, Meeting ID and Passcode, date and time (if a scheduled meeting), and instructions), which you must **Copy** & paste into the body of any email platform you choose to use.

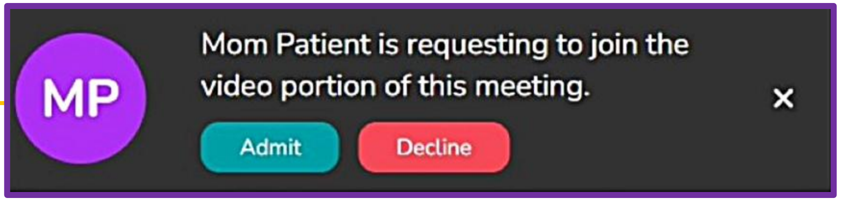
3. **Invite via Email** - opens your computer's default email platform to send all the meeting information. All meeting information will automatically generate into the body of the email. You may add additional test to the email, if desired, before sending.

4. **Invitation via SMS** (text message). *May or may not be enabled for your clinic.* Your participant’s mobile number will be required.

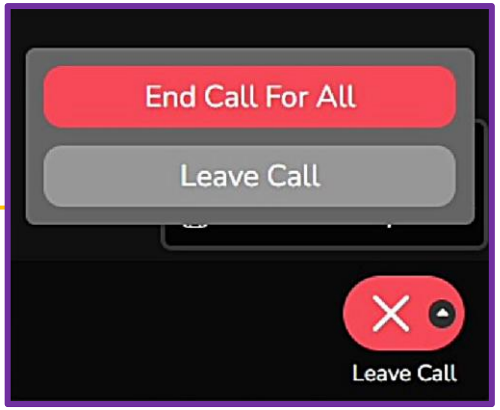
2d. Start an '0n-Demand' Video Meeting

- Admit Invited Participants / End or Leave the Video Meeting -

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



- ❑ Complete or leave 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, as long as it is active



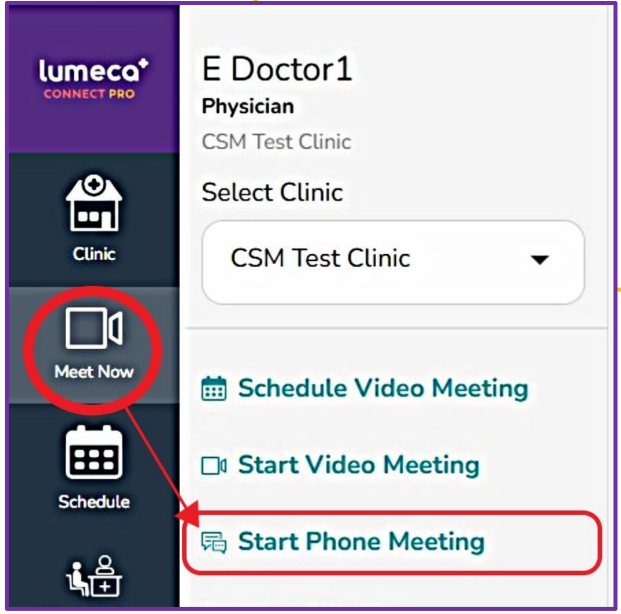
Video meeting features are found under Section 13 below.

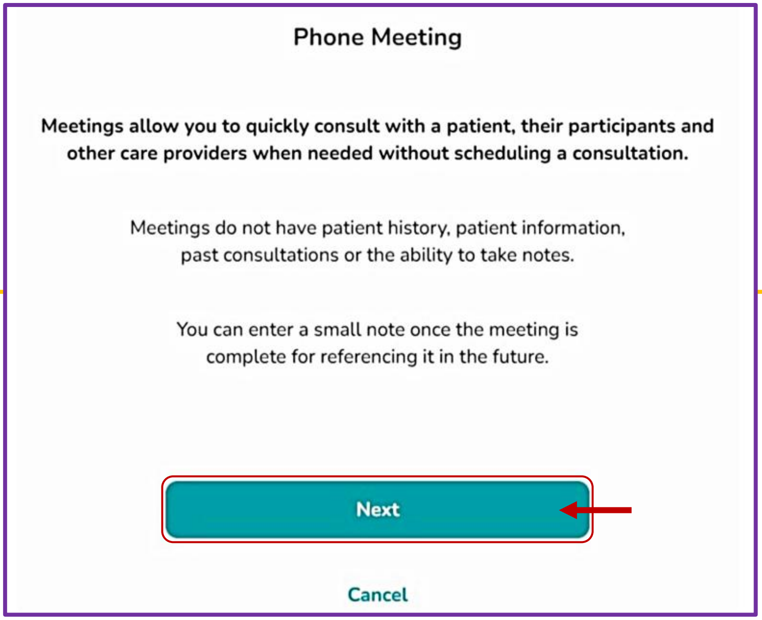
Start a Phone Meeting

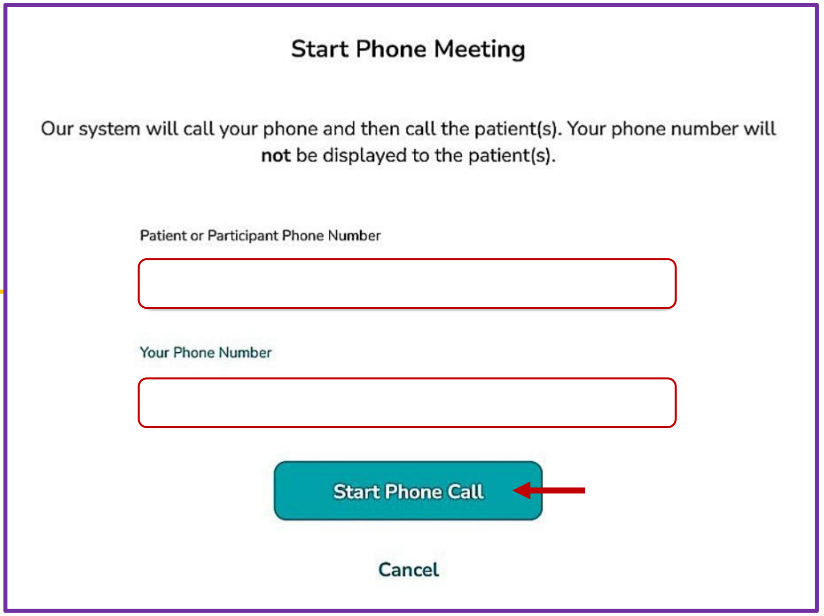
- Speak on the phone with one other participant -

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

- ❑ Click **Meet Now** in the dashboard, then select **Start Phone Meeting**
- ❑ Review the screen, then click **Next**
- ❑ Enter the patient/participant's phone number and your number (your number is never shared and remains hidden)
- ❑ Click **Start Phone Call** (the system will call the host first; after they pick up, it will automatically call the other participant)



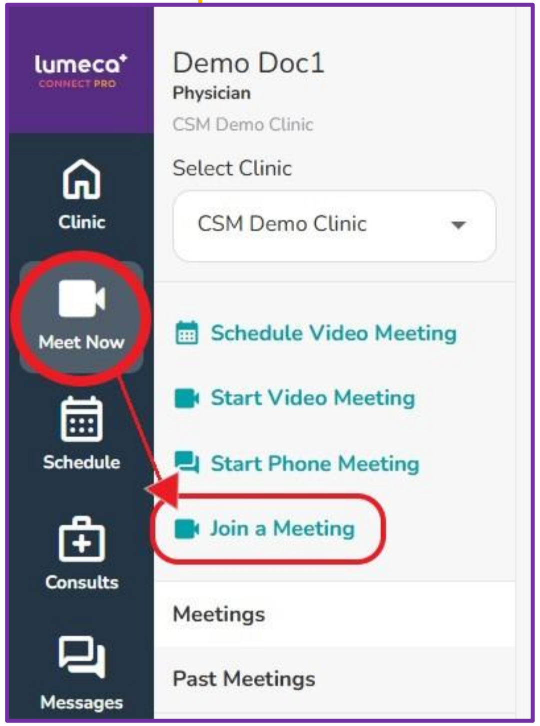


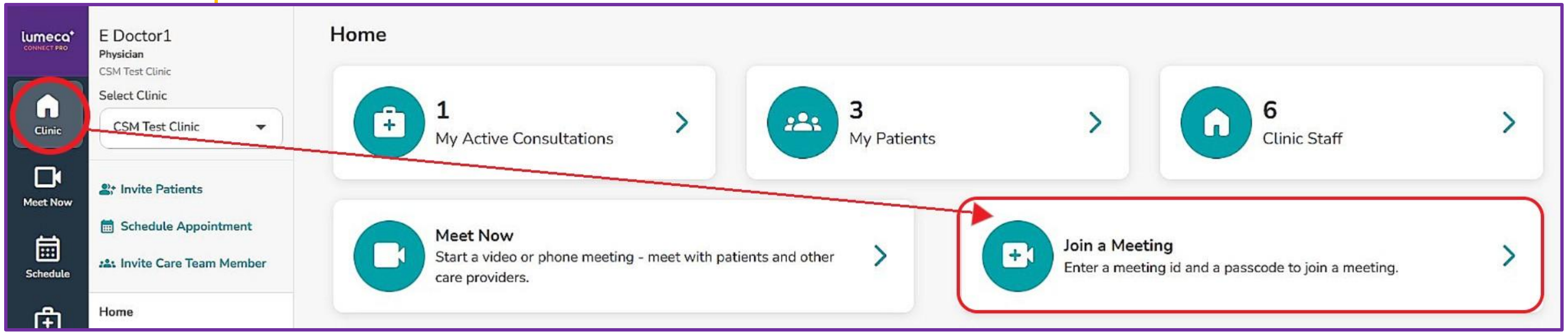


4a. Join a Meeting You Are Invited To

Either:

❑ Select **Join a Meeting** under **Meet Now** in the dashboard **OR** from the **Clinic** screen:



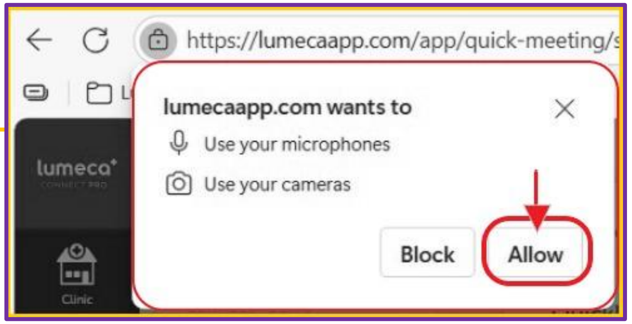


You may also join a meeting from:

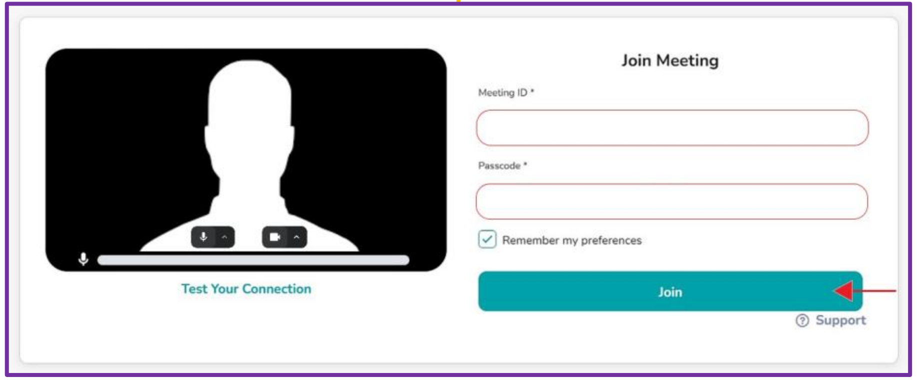
- the account **Login** screen > **Join Meeting Now,** or
- using a meeting **URL link** that is sent to you.

4b. Join a Meeting You Are Invited To

- ❑ Whenever prompted, click **Allow** for both your camera and microphone.

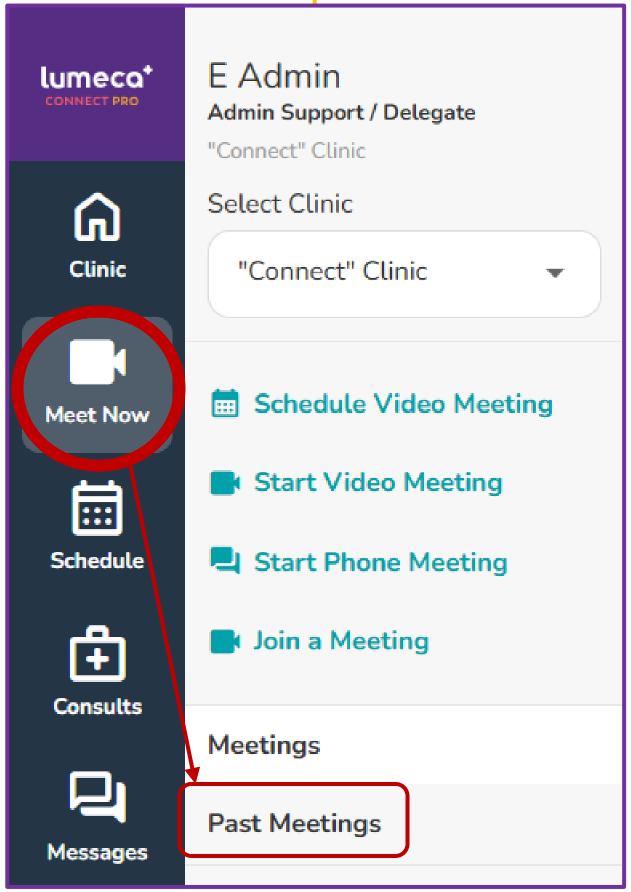


- ❑ If on the web on any device, you should see yourself in video and see the microphone volume bar moving.
- ❑ You may test your audio and video equipment by clicking **Test Your Connection.**
- ❑ Type in the Meeting ID and Passcode **manually** from the information provided to you.
- ❑ When logged in, it is not necessary to add your name, as the system pulls this from your account information.
- ❑ It is recommended you leave your microphone and camera '**ON**' - you may turn the camera OFF and/or mute yourself once in the video, if desired.
- ❑ If you want your camera/microphone settings and name saved for next time, check **Remember my preferences**.



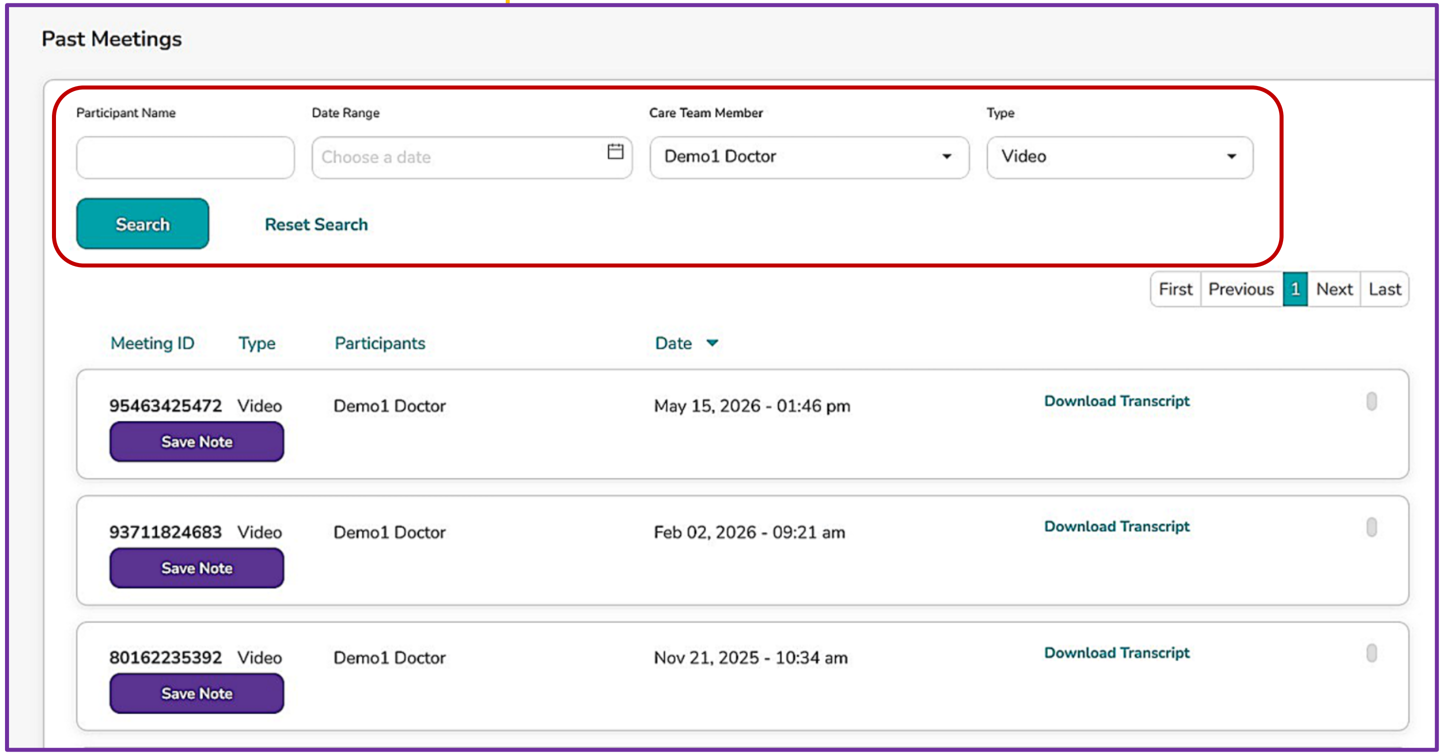
5. Past Meetings

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



The most recent meetings will be listed, or

- ❑ Use the search criteria to find a specific meeting



Cancel a Scheduled Meeting

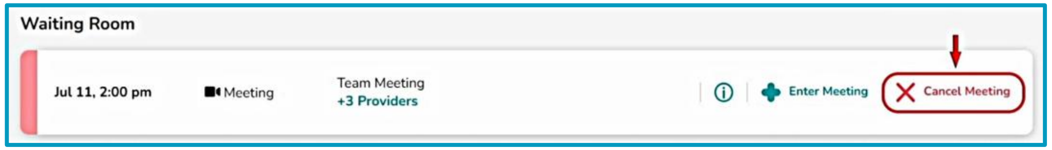
Note: Appointments cannot be edited; they must be cancelled and rescheduled.

- ❑ Log into your account as the meeting host or clinic admin
- ❑ Go to either **Schedule** or **Consults** in the dashboard. In the **Schedule** tab, you must click on the meeting you want to cancel (in 'Week' or 'Day' view).
- ❑ Select **X – Cancel Meeting**
- ❑ 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').
- Invited patients/participants will not receive a notification. They must be contacted directly.

'Schedule' Tab

'Consultations' Tab



Confirm 'One-Time' Meeting

Confirm 'Recurring' Meetings

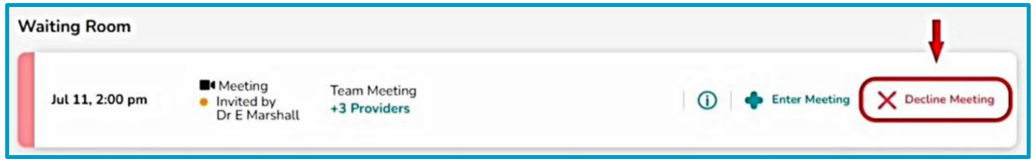
Decline an Invitation to a Scheduled Meeting

- [ ] Log into your account as the invited clinician or the clinic admin
- [ ] Go to either **Schedule** or **Consults** in the dashboard. In the **Schedule** tab, you must click on the meeting you want to decline (in ‘Week’ or ‘Day’ view).
- [ ] Select **X – Decline Meeting**
- [ ] A pop-up will appear asking you to confirm. Confirm the cancellation.

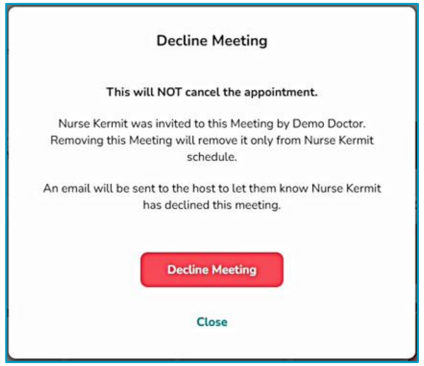
- Done by the invited provider or the clinic admin
- Removes the appointment from their schedule only and will not change the appointment or schedules of other invited providers.
- The meeting host and office admin will receive a notification, based on their ‘Notification Settings’ (found under ‘Account’).

‘Schedule’ Tab

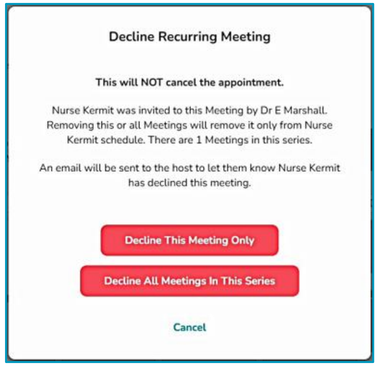
‘Consultations’ Tab



Confirm ‘One-Time’ Meeting



Confirm ‘Recurring’ Meetings



Patient Wants to Cancel Their Scheduled "Meet Now" Meeting

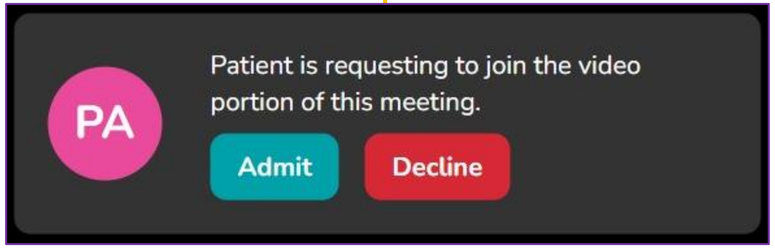
- Patients do not need a Lumeca account to join video meetings; they can simply click an '*https/…*' quick link in their email or SMS text message to access them.
- Video meetings are not visible when patients are logged into their account, if they have one.

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

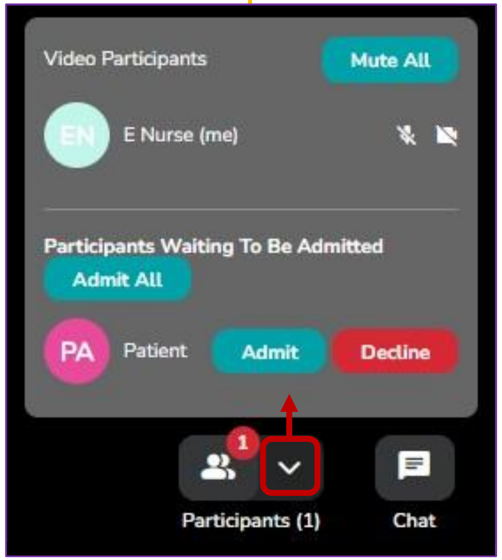
13. Video Session Features

'Admit' or 'Decline' Users into the Video

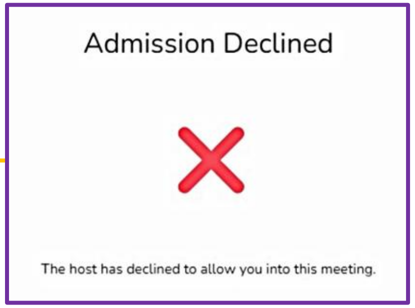
- All present care team members of your virtual clinic can **Admit** participants or **Decline** participants who are requesting to enter the video call.
- This can be done using the popup that appears over the video screen or from the **Participants** button.



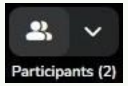
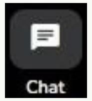
OR



- 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.



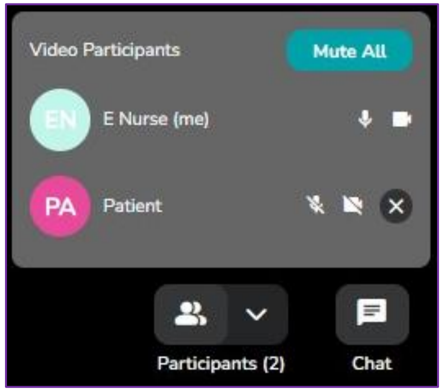
Video Features

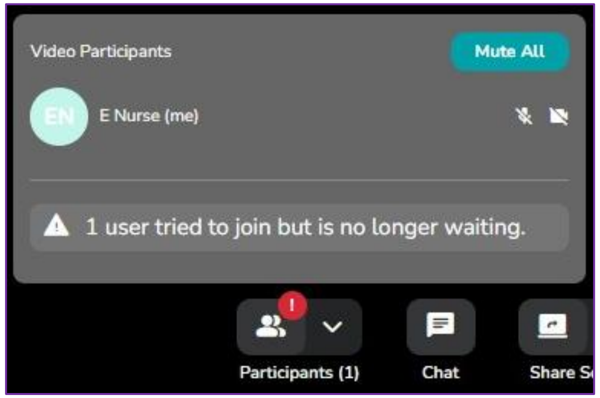
Enter Full Screen / Exit Full Screen	Enter Full Screen / Exit Full Screen
Enter Speaker View	Video layout where the speaker shows larger to other participants – shared screens are visible in this view only
Enter Gallery View	Video layout where all participants are equal size on a grid – shared screens are not visible in this view
	Mute/unmute yourself. Click the drop-down menu beside Mute to change selection of your microphone and speaker.
	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.
	Click to see participant names. The host can mute/unmute any or all participants or turn their camera on or off.
	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 – 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.

Managing Participants

When clicking the **Participants** button, the meeting host can:

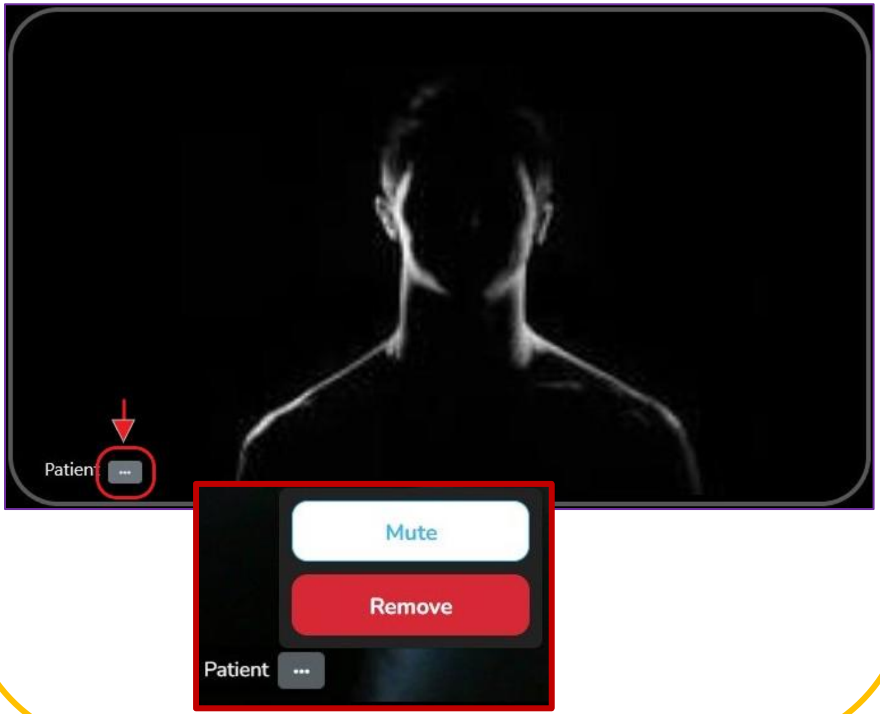
- See a list of participants who are in the video
- See who is muted/unmuted
- See who has their camera on or off
- **Mute All** participants
- Click the **X** to immediately remove a participant from the video
- See if anyone is having or had issues joining the video



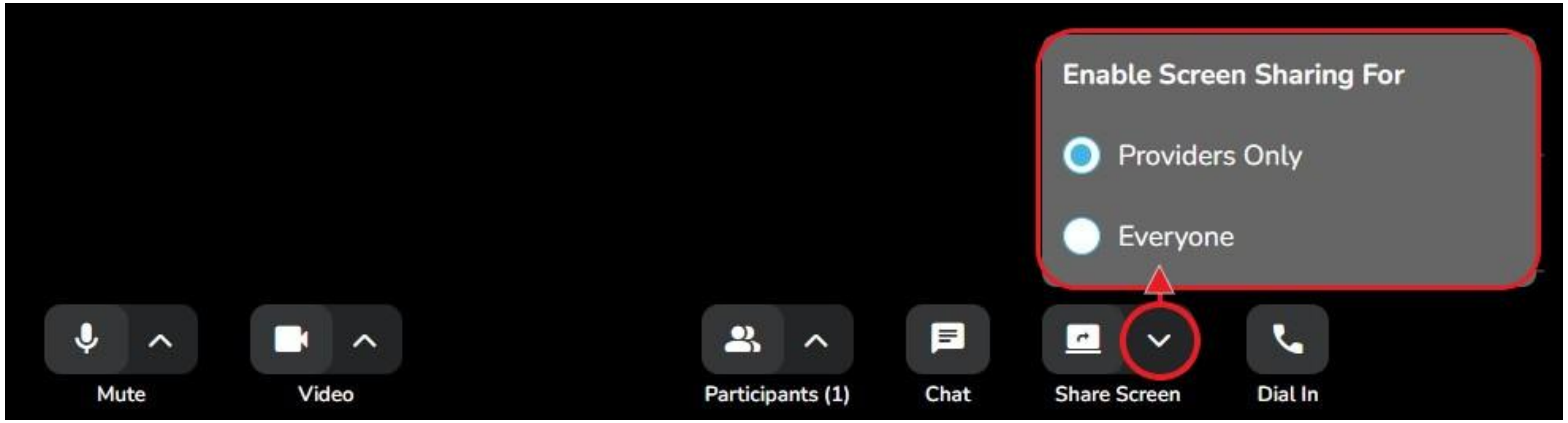


By clicking the **3 dots** in the lower-left corner of a participant's video frame, the meeting host can:

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



Share a Screen Within a Video



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

- [ ] The host would click the small arrow next to **Share Screen**, then change **Providers Only** to **Everyone**

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

Annotations

Click to highlight specific areas on your shared screen

Stop Sharing

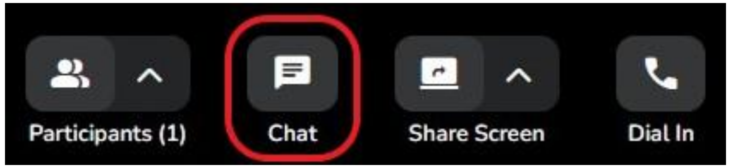
Click to stop sharing your screen

Send a Chat Message

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

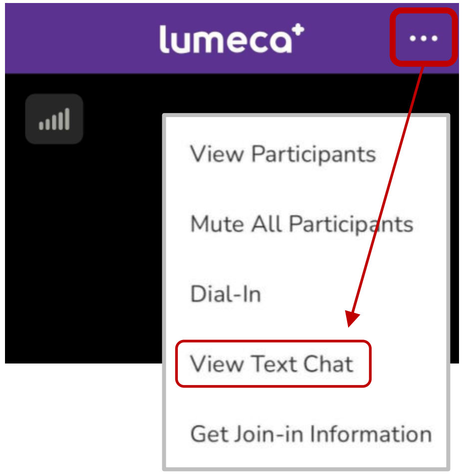
❑ Open the **Chat** window:

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



OR

On the 'Lumeca Health' mobile APP, click the **3 dots** at the top of the video window and select, **View Text Chat**



❑ Type your chat message and press **Send**.

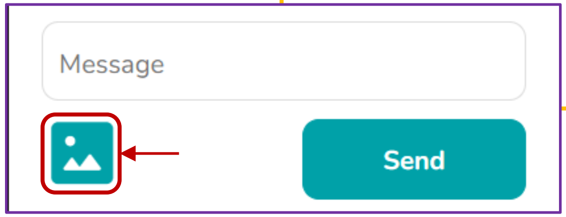
You may unsend a message, photo, video or document by hovering over the message/file (on laptop/desk) or holding your finger on the item (on mobile) and clicking Unsend Message/Unsend, enter a reason and confirm.

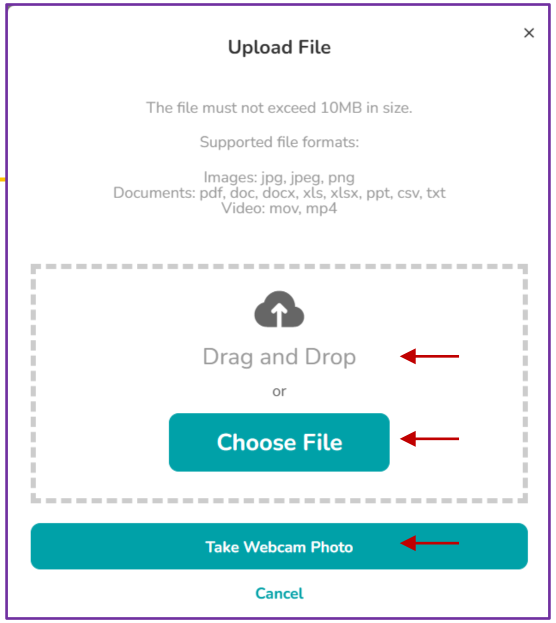
Upload a File (Photo, Video or Document)

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

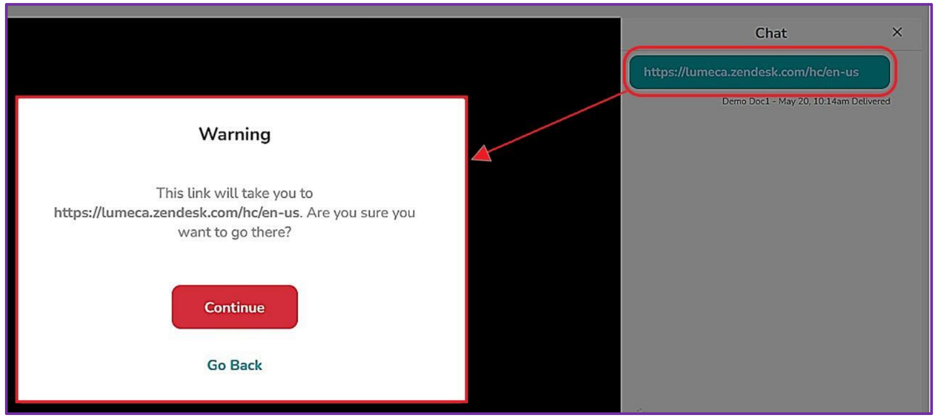
- ❑ Open the **Chat** window (see instructions on previous screen).
- ❑ Select this icon  located under the **Message** box.
- ❑ Note the supported file formats listed, then choose one of the 3 options:
  - Drag and Drop from a saved location on your device
  - Choose a saved file from your device
  - Take a webcam photo

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



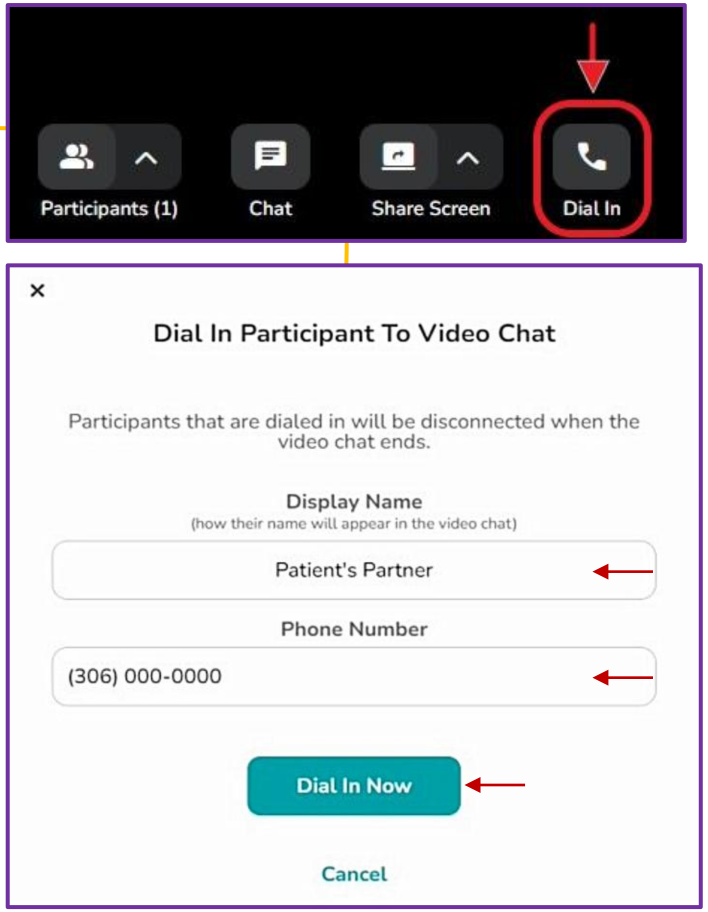


When opening a hyperlink that has been shared in **Chat**, a warning message will appear. By clicking **Continue**, you will be taken to the hyperlink content in a new window. Your video will remain open and may be accessed from the tab at the top of your screen.

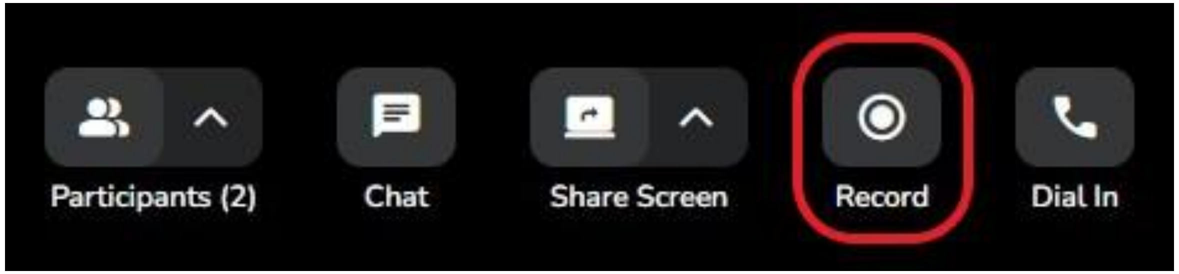


Dial a Participant Into the Video by Phone

- ❑ Once in the video chat, click **Dial In**
- ❑ Enter the **Participant's Display Name** (*this is how their name will appear in the video)*
- ❑ 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 host to remove the participant from the call.
  - Multiple people can be dialed into a video call - simply repeat the process for each participants.



Record a Video Call



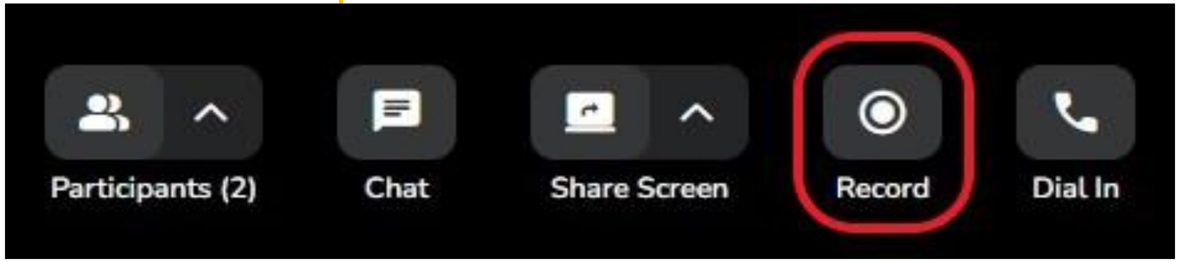
The **Record a Video Call** feature may be turned off by default and requires a request to be turned on.

This button will not appear if the feature is disabled.

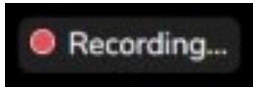
- Email us at *sales@lumeca.com*, OR
- Use this link to send us a message, *https://www.lumeca.com/request-demo*

Record a Video Call

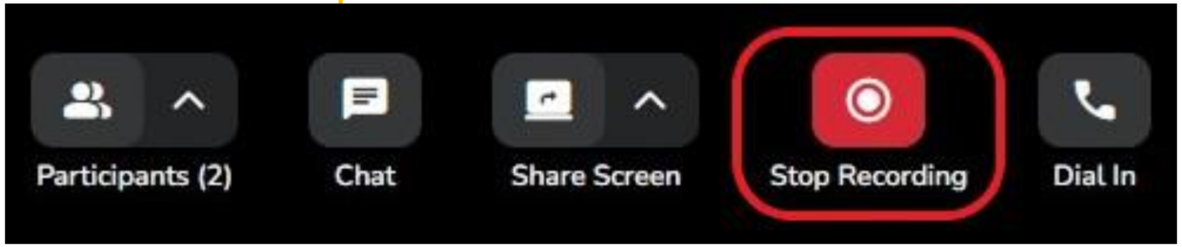
❑ To begin recording, click **Record.**



A message will appear letting you know recording has begun.



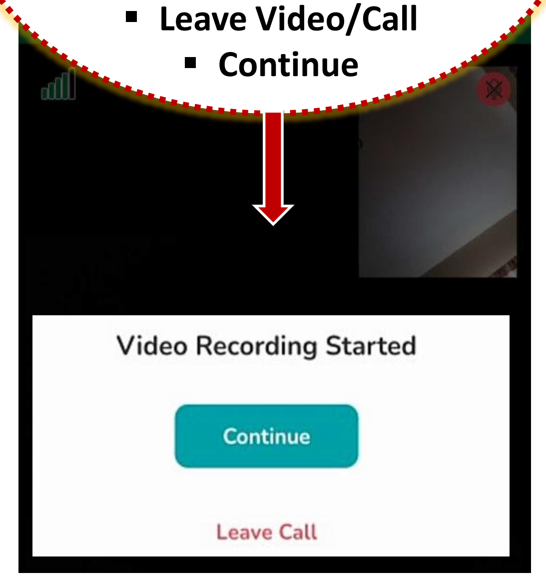
❑ To end recording, click **Stop Record**. A message will appear letting you know recording has stopped.



Video participants will receive notification 'Video Recording Started'

They have two options:

- **Leave Video/Call**
- **Continue**



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

14. Inviting Patients

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

When seeing patients via **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.

Patient Self Scheduling

There is a feature in **Lumeca Health** that allows for patients to self-schedule appointments based on a calendar that you set.

This feature is turned off for most clinics, and a request must be made if you wish it turned on. Although off, there are some items that you will see in the application that are oriented towards this feature.

For example:

- **Appointment Reasons** – there are default reasons in the system and because patient self-scheduling is turned off, there is less reason to modify these.
- **Notifications for appointments created by patients** - because self-scheduling is turned off, these are not available to change.

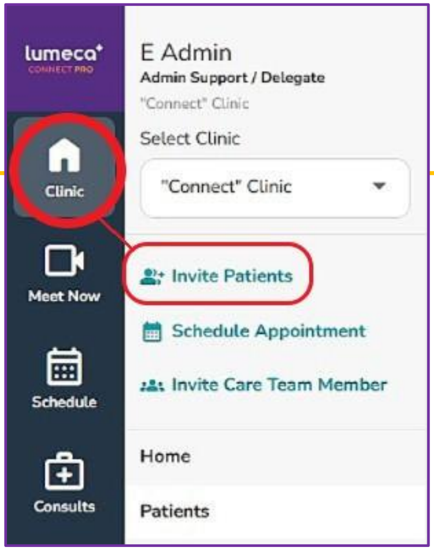
Even though self-scheduling is turned off, your patients still need to be invited to join your virtual clinic if you are scheduling them into Patient Consultations.

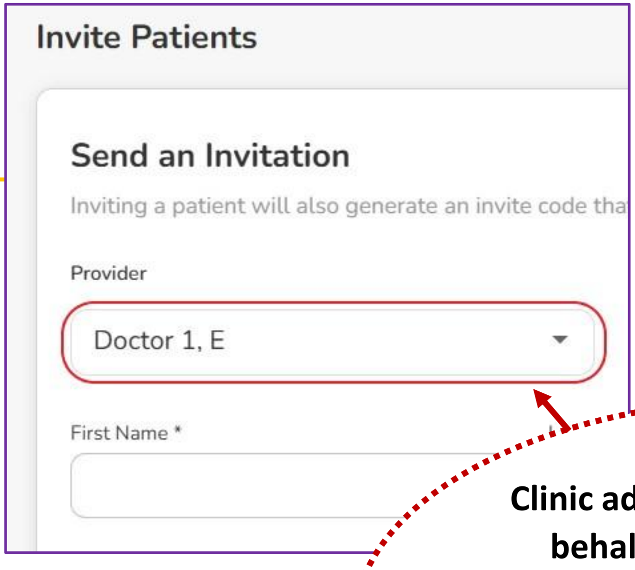
Inviting Patients

This step is required when you are seeing patients via **patient consultations**.

For patients to have access to your virtual clinic as virtual patients, they must be invited, must create a patient account and accept the invitation you send them. 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**.





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

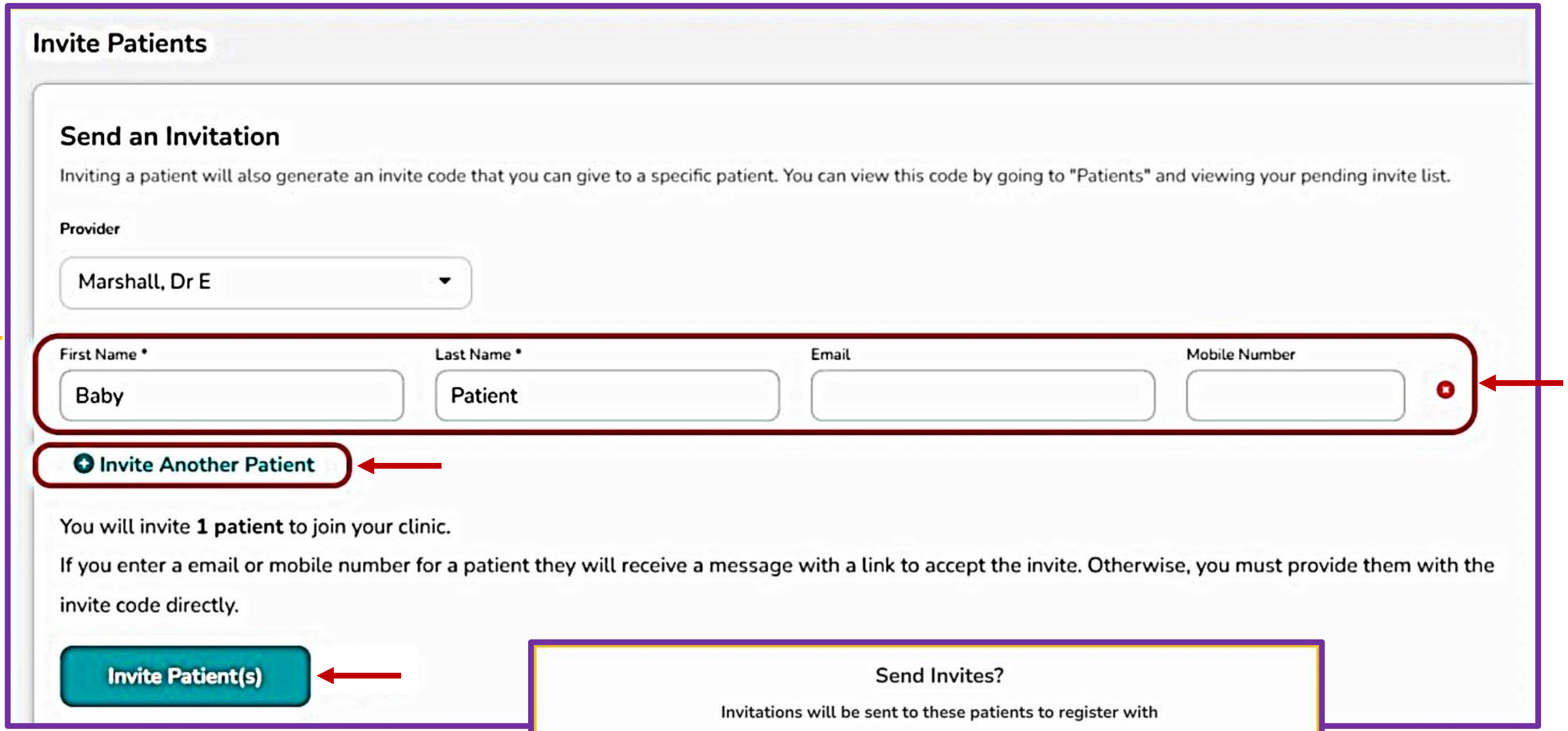
They must select the physician from a drop-down menu that will be visible to them.

There are 3 ways to invite patients, each covered on the following pages:

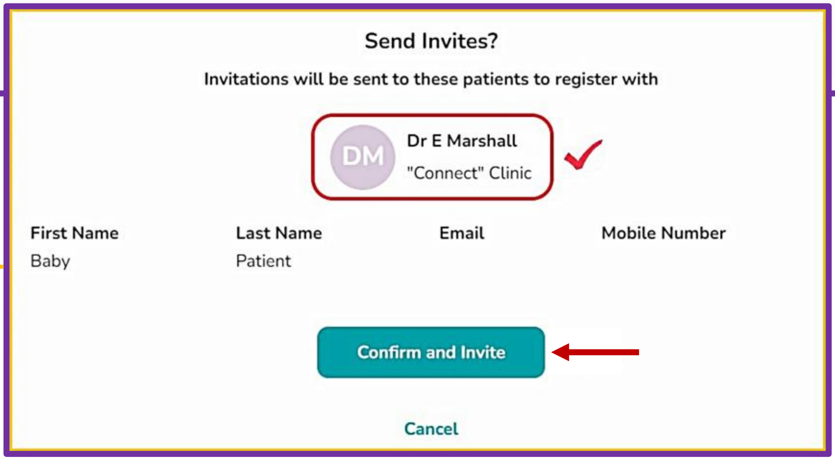
1. Inviting one patient or a small batch
2. Inviting via an Invite Code
3. Importing a .CSV file

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)**

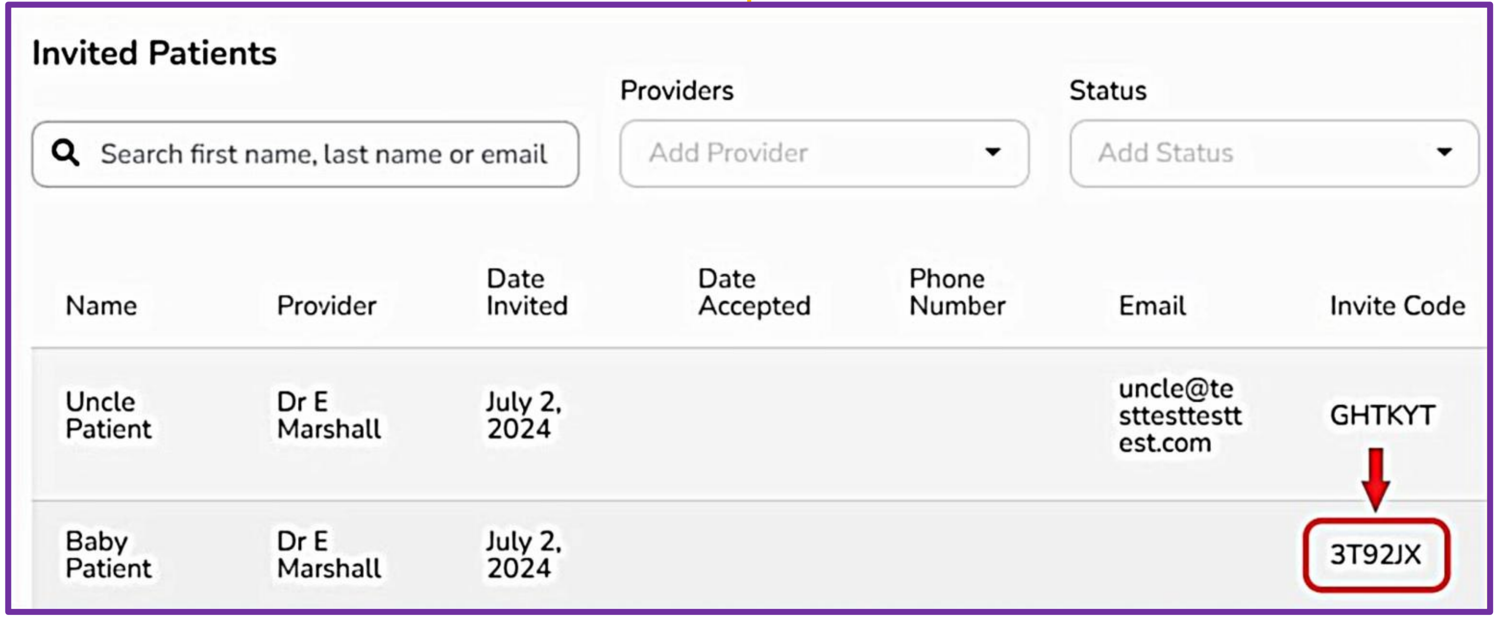


- ❑ Check you have selected the correct healthcare provider and clinic, then click **Confirm and Invite**



2. Invite Code (when an email address or mobile number is not available

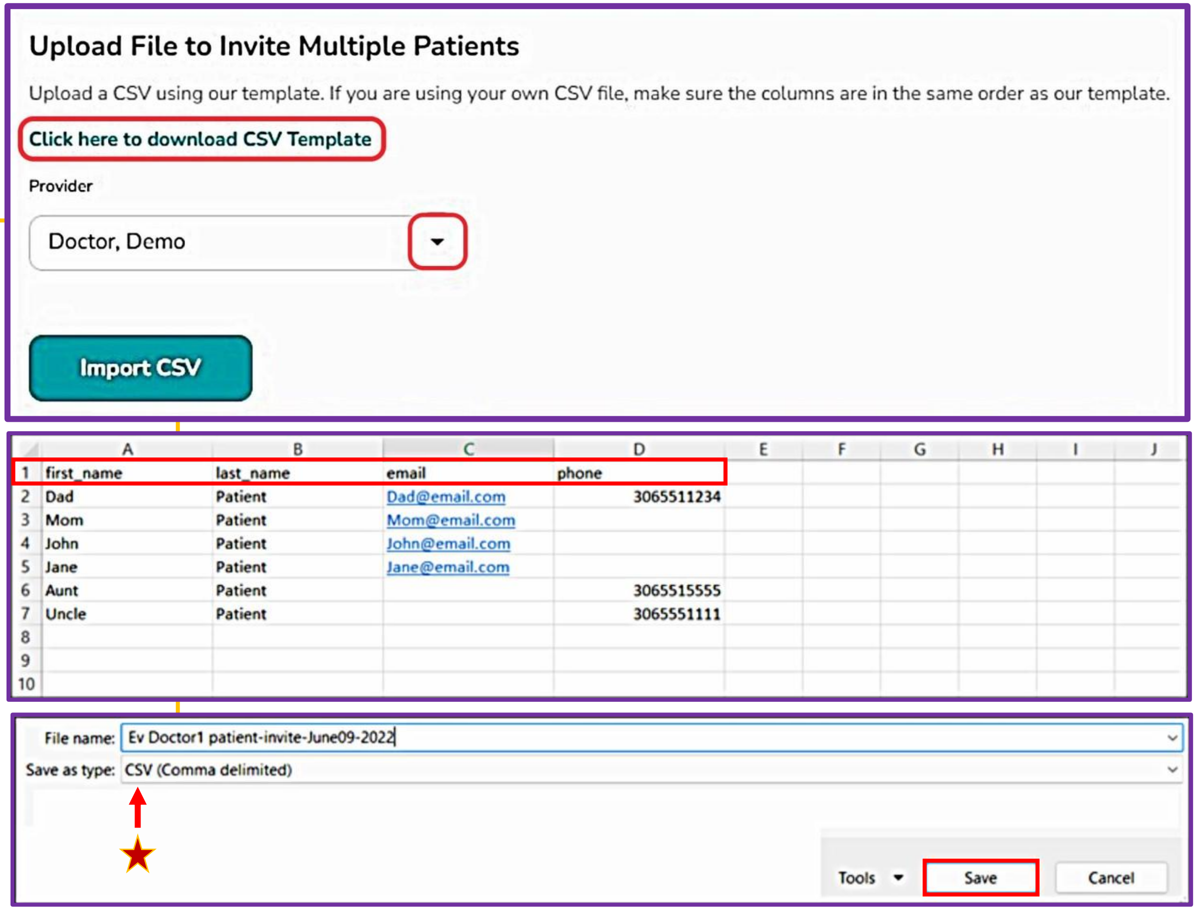
- ❑ Follow Method 1
- ❑ Scroll down the page to **Invited Patients**
- ❑ Locate the invited patient; note the **Invite Code** and share this with the patient along with the SK Virtual Visit app information available from the Google Play/Apple Store and/or the web address



3a. 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**.
- ❑ **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.

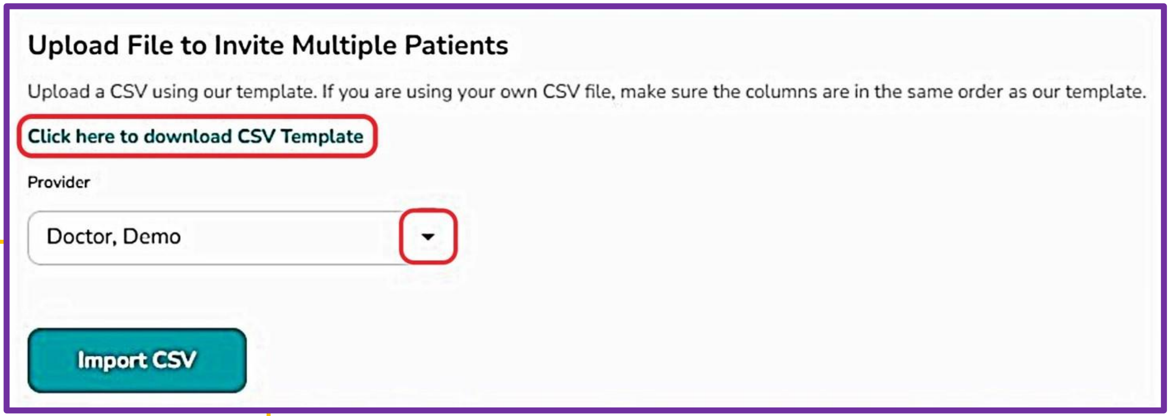


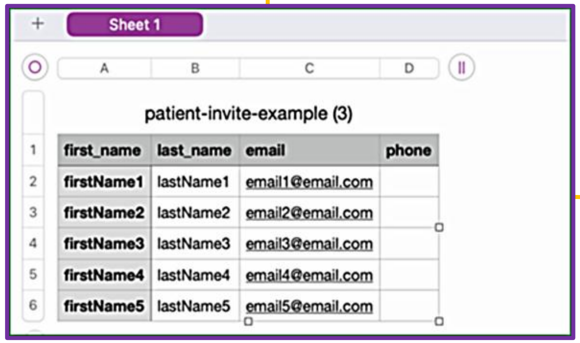
Note: Previously invited patients will not receive an additional invitation

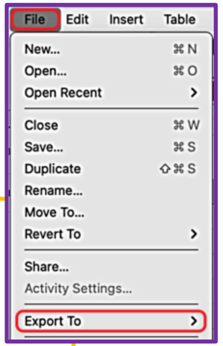
3b. Import a CSV File with a Large Group of Patients

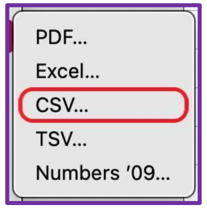
- For MAC Users Without Excel Installed -

- ❑ Scroll down to **Upload File to Invite Multiple Patients**.
- ❑ If you are the clinic admin with more than one healthcare provider, **Select the Care Provider** from the drop-down.
- ❑ Select **Click here to download CSV Template**.
- ❑ Go to your **Downloads** folder and select the CSV template and **Save**. Leave Row 1 (headings) intact, and add patient information to the CSV file. If information is unknown, leave the field blank. The phone number should contain no dashes or parenthesis.
- ❑ Click **Export To**, choose **CSV**, then **Next**. DO NOT click 'Include Table Names'.
- ❑ Give it a file name and choose the location to save it.
- ❑ Click **Import CSV**, locate the CSV file you saved and select it. The invitations to your patients will be sent and a pop-up screen will appear stating success.

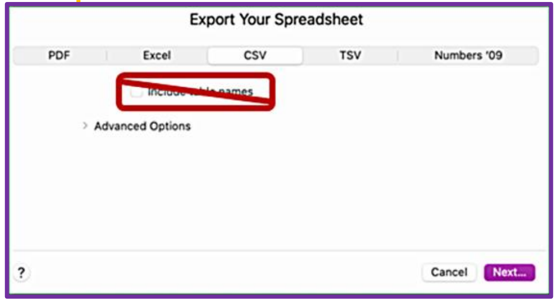








Note: Previously invited patients will not receive an additional invitation



Invited Patients

This 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** (as it may have the wrong details).

Invited Patients

Search first name, last name or email

Providers: Add Provider

Status: Add Status

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				8TY7QT	Pending
Aaron emailtest	Dr. Nagy	June 21, 2023			com	CVXX84	Error Sending

Status:

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

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

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

Expired – the invitation time has expired

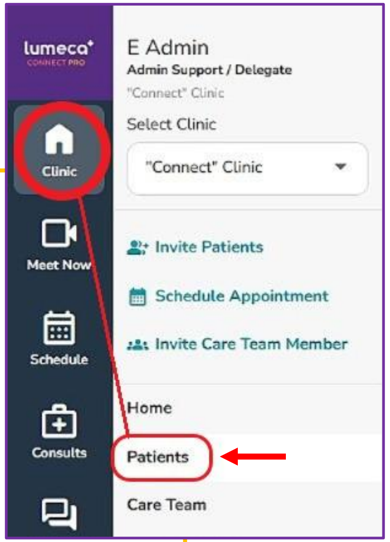
15. Searching for Patients

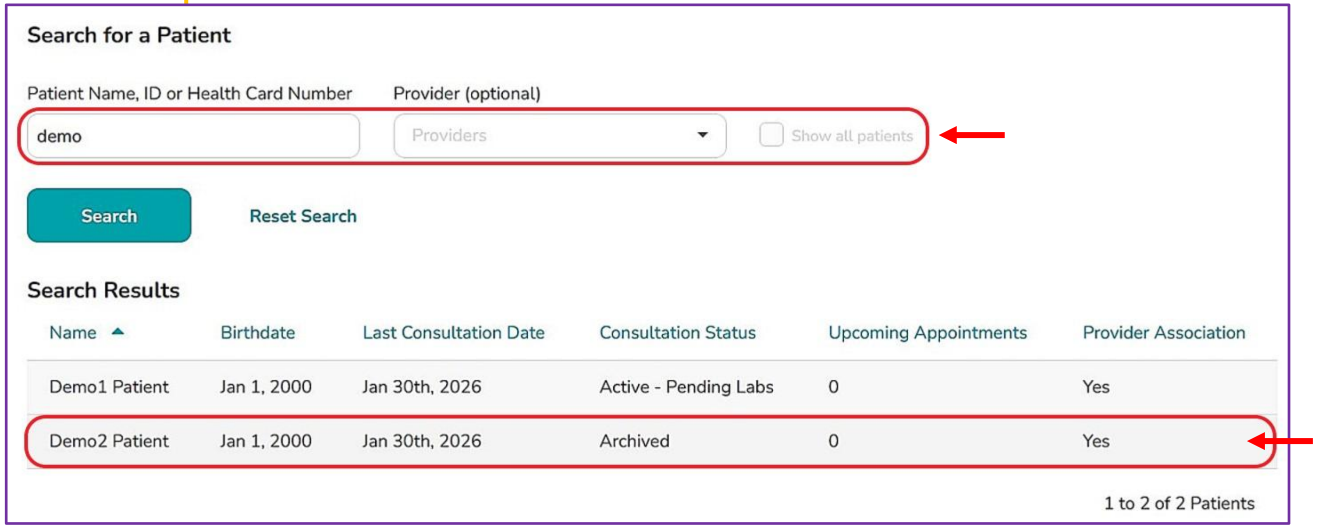
Patients will only appear after you have invited them to join your virtual clinic, they have accepted your invitation and created their **Lumeca Health** account.

Patient Search

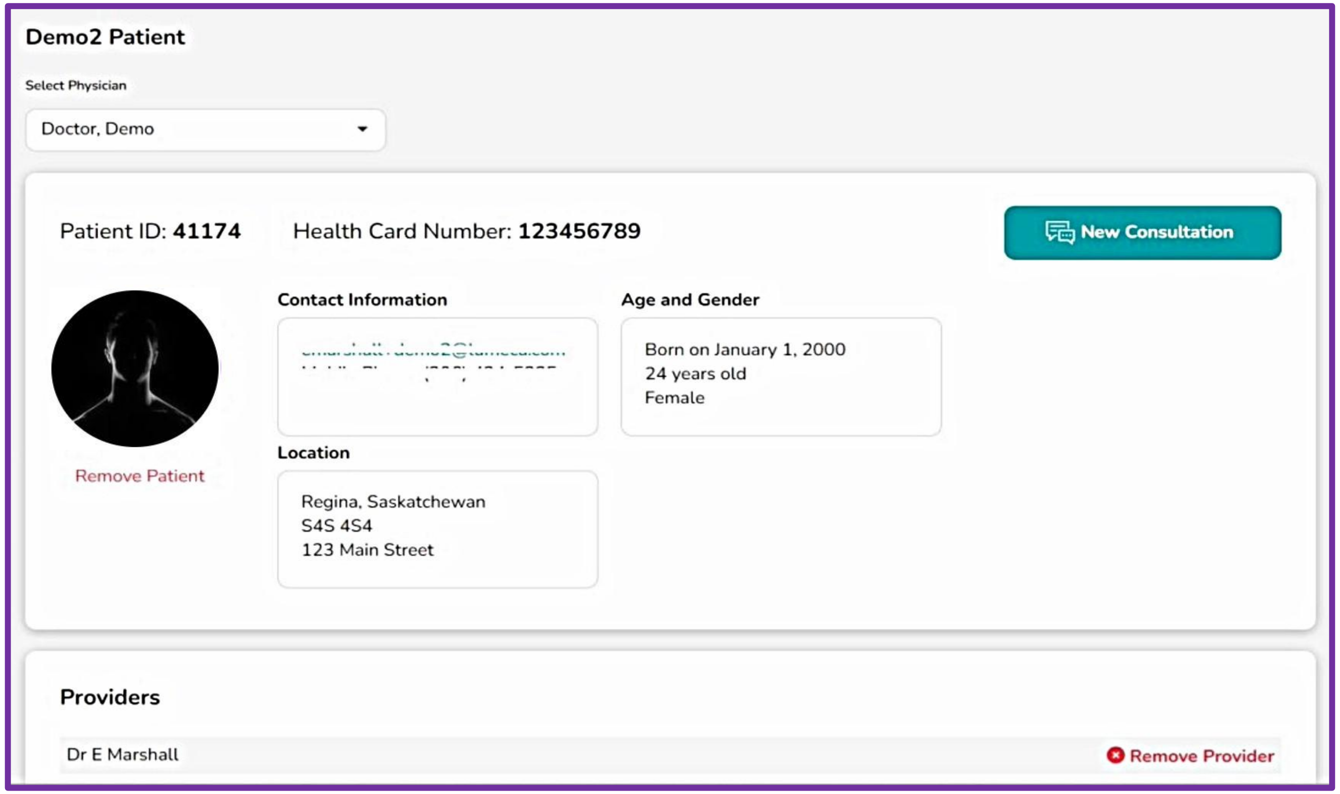
- ❑ Select **Clinic** in the dashboard, then click **Patients**.
- ❑ Either:
  - Enter the patient’s first name, last name or health card number, **OR**
  - Select the correct healthcare provider from the drop-down list. Check **Show all patients** if you wish to see all patients who are actively part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

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





Patient Information Screen



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**

Here you may:

- Verify the patient is associated with your clinic
- View information patient entered when they created their profile
- Schedule a **New Consultation**
- **Remove Patient** or
- If removed, **Add Patient to Clinic**

16. Scheduling and Canceling Patient Consultations

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

.

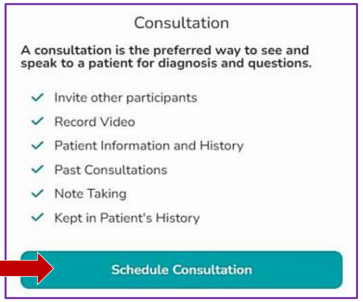
Schedule a Patient Consultation - Step 1

There are four places within the platform from where a patient consultation can be scheduled.

In this section, we will cover doing so from the '**Schedule**' tab. ★

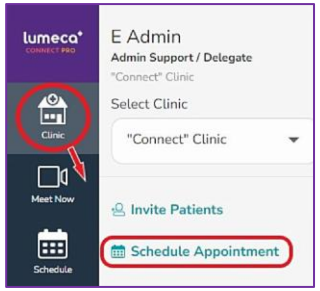
★ 1. The **Schedule** tab >

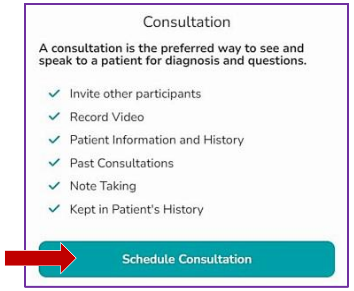
- Select **Schedule Appointment** > **Schedule Consultation**



2. The **Clinic** tab >

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



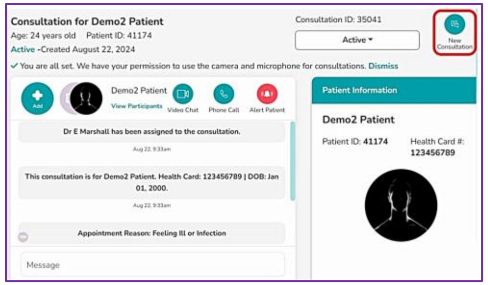


3. The **Patients** tab >

- Search for the patient > click their name > tap **New Consultation** > **Schedule Appointment**

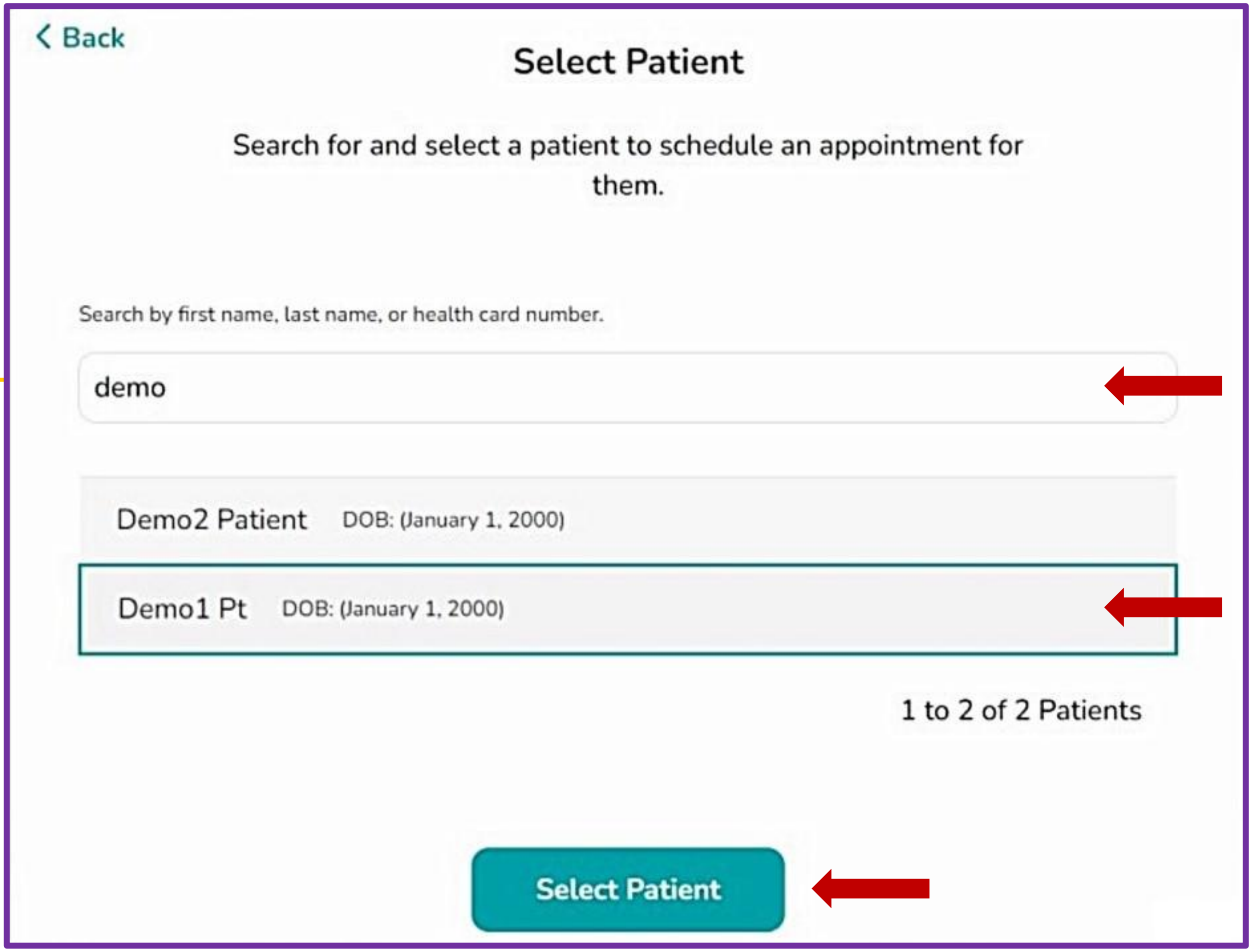
4. While in an active patient consultation >

- Tap **New Consultation** > **Schedule Appointment**

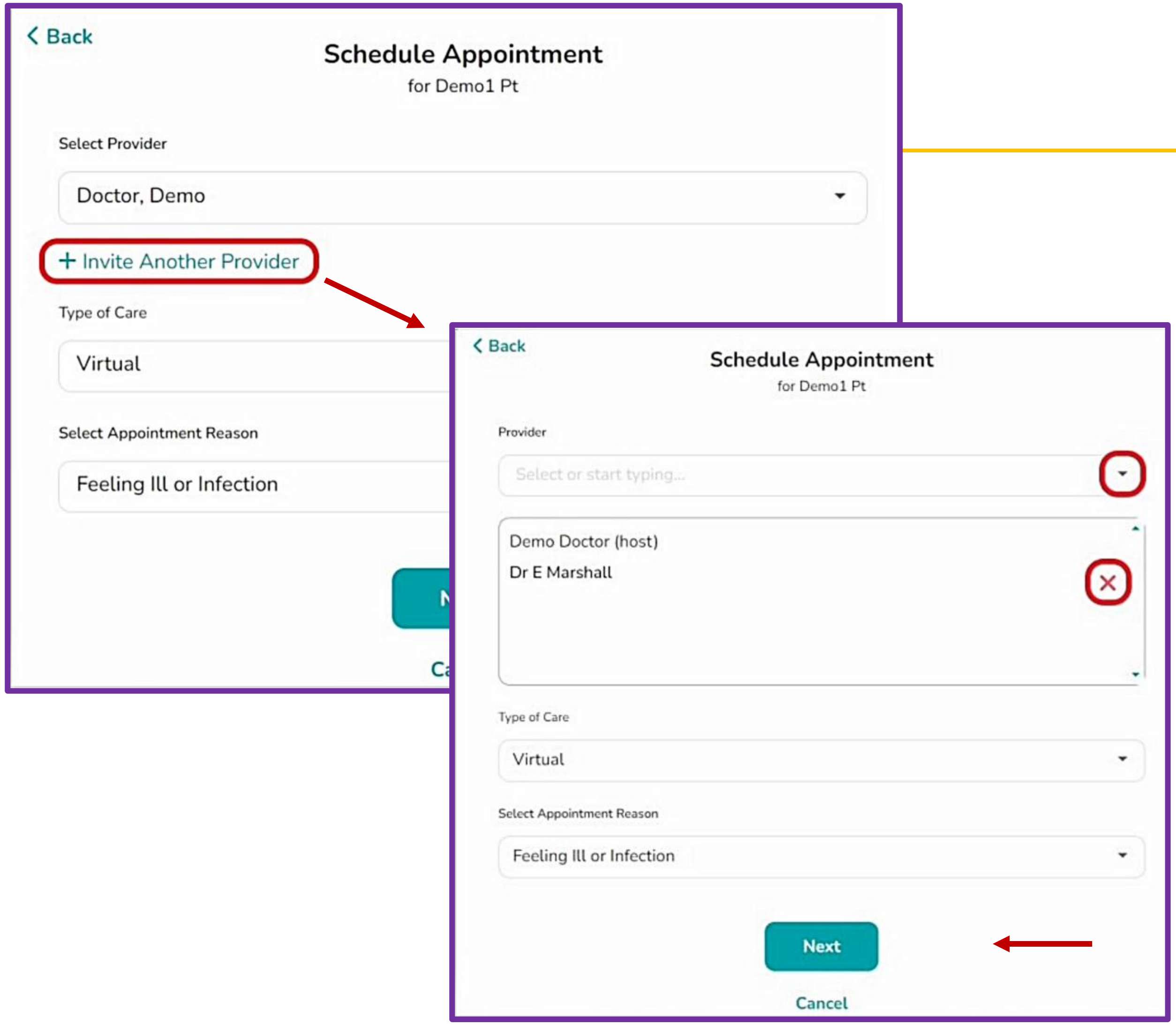


Schedule a Patient Consultation - Step 2

- ❑ Type in the patient's health card number or first / last name (a list will start to appear)
- ❑ Choose the patient, then click **Select Patient**

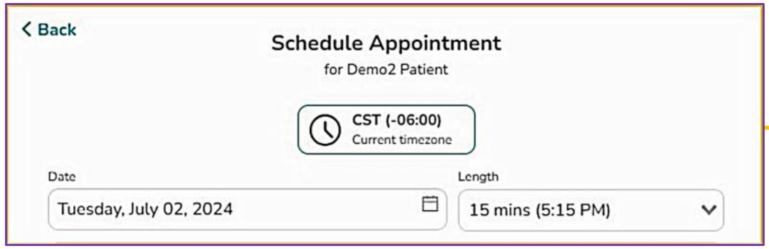


Schedule a Patient Consultation - Step 3



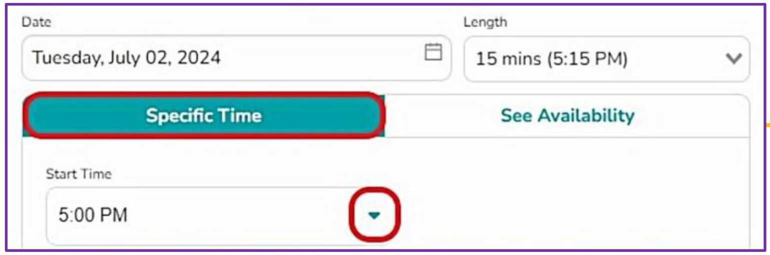
- ❑ Clinic admins must select the healthcare provider's name from the **Select Provider** drop-down menu.
- ❑ Choose **Type of Care** (virtual or in-person) and **Appointment Reason** from the drop-down menus.
- ❑ If additional providers from the same virtual clinic are being invited to the patient consultation, click **+ Invite Another Provider.**
- ❑ Add their name from the **Provider** drop-down menu. If someone is added by mistake, click the red '**X**' beside their name, to remove them from the list.
- ❑ Once complete, click **Next**

Schedule a Patient Consultation - Step 4



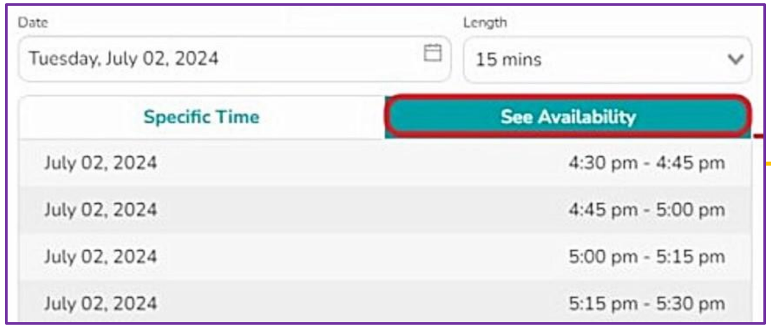
'**Date**' - Enter the date of the meeting or, if scheduling recurring meetings, the first meeting date.

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



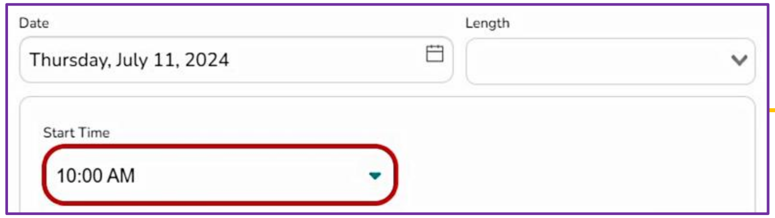
When scheduling <u>a single provider</u> and their schedule **IS NOT** entered:

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



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

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



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

- ❑ Select a **Start Time**.

Schedule a Patient Consultation - Step 5 - 'Repeat'

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

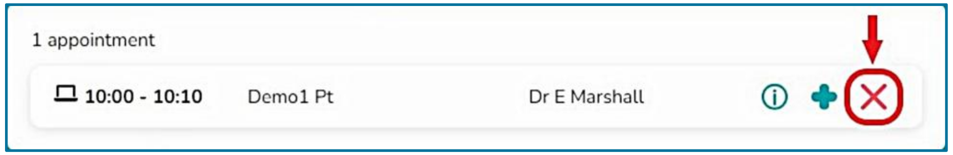
Cancel a Scheduled Patient Consultation

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

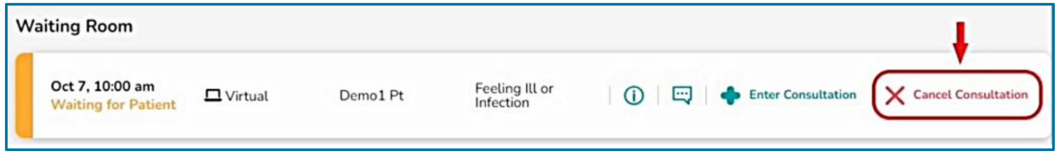
- ❑ Log into your account as the meeting host or clinic admin
- ❑ Go to either **Schedule** or **Consults** in the dashboard. In the **Schedule** tab, you must click on the meeting you want to cancel (in ‘Week’ or ‘Day’ view).
- ❑ Select **X – Cancel Consultation**
- ❑ A pop-up will appear asking you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

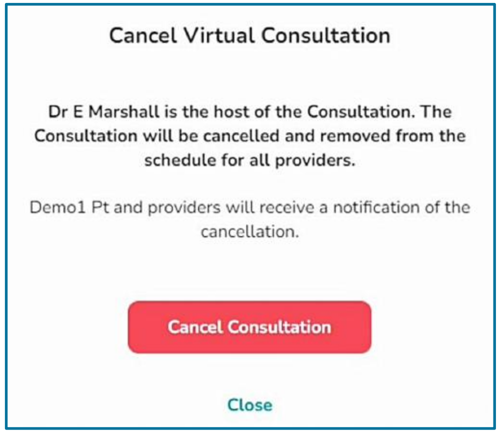
‘Schedule’ Tab



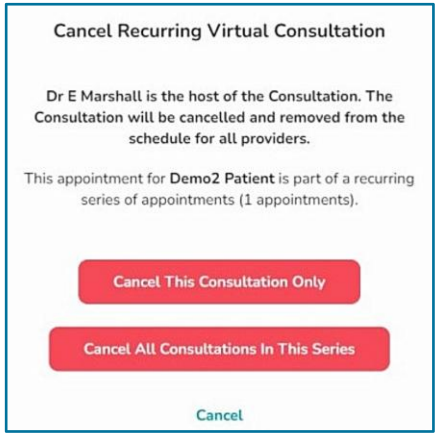
‘Consultations’ Tab



Confirm ‘One-Time’ Consultation



Confirm ‘Recurring’ Consultation

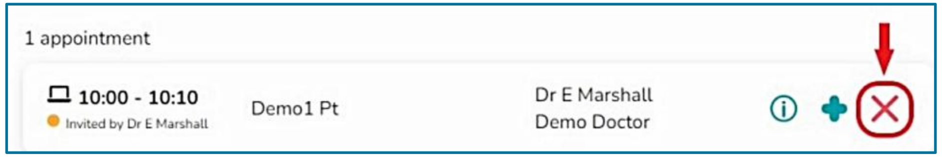


Decline an Invitation to a Scheduled Patient Consultation

- ❑ Log into your account as the invited clinician or the clinic admin
- ❑ Go to either **Schedule** or **Consults** in the dashboard. In the **Schedule** tab, you must click on the meeting you want to decline (in 'Week' or 'Day' view).
- ❑ Select **X – Decline Consultation**
- ❑ A pop-up will appear asking you to confirm. Confirm the cancellation.

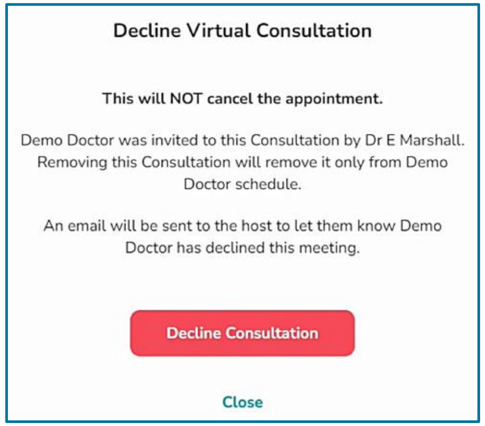
- Done by the invited provider or the clinic admin
- Removes the appointment from the invited provider's schedule only and will not change the appointment or schedules of other invited providers.
- The meeting host and office admin will receive a notification, based on their 'Notification Settings' (found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

'Schedule' Tab

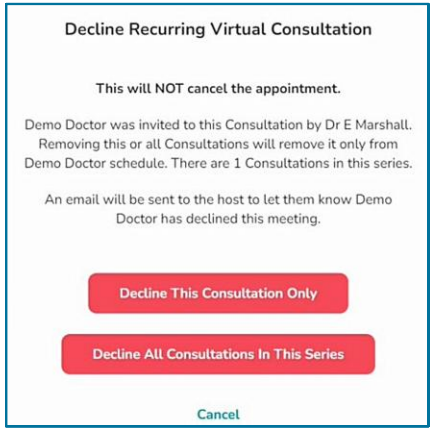


'Consultations' Tab

Confirm 'One-Time' Consultation



Confirm 'Recurring' Consultation



Patient Makes an Online Request to Cancel Their Scheduled Consultation

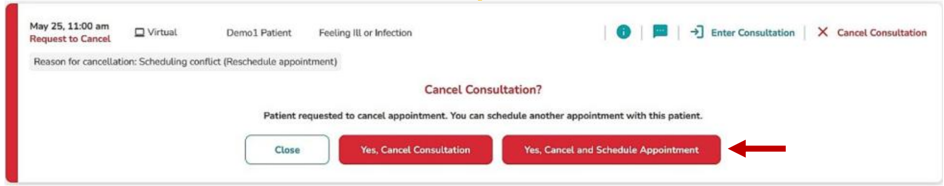
Patients may log into their **Lumeca Health** account and make an online request to have their patient consultation cancelled.

Clinic users will find these requests under either...

Consults Tab >
'Active and Pending' or 'Requests to Cancel':

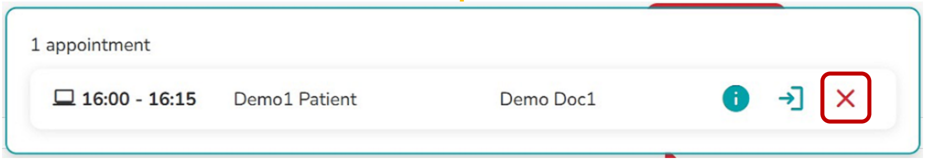
- ❑ Locate the scheduled appointment, then click **X Cancel Consultation**.

- ❑ Select one of the three available choices:
  - **Close**
  - **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.

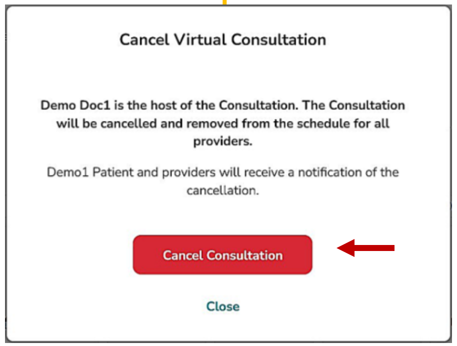


Schedule Tab >
'Week' View

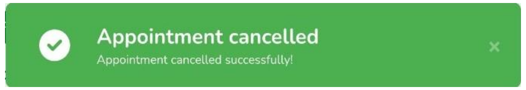
- ❑ Locate the scheduled appointment, tap into it, then click the '**X**'.



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



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



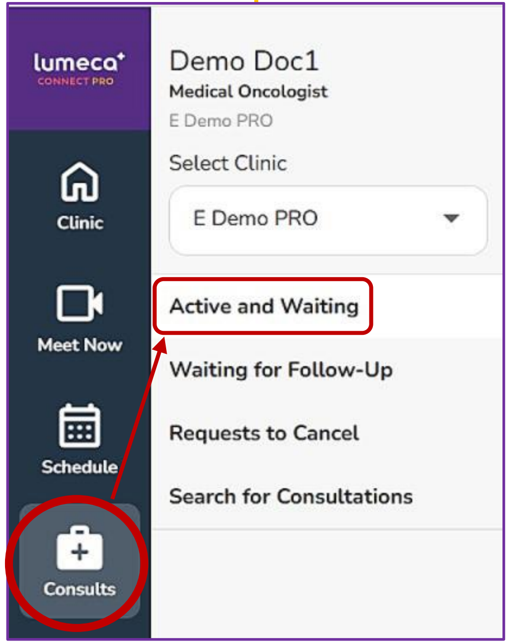
17. The 'Active & Waiting' Screen (scheduled appointments)

The 'Active & Waiting' Screen

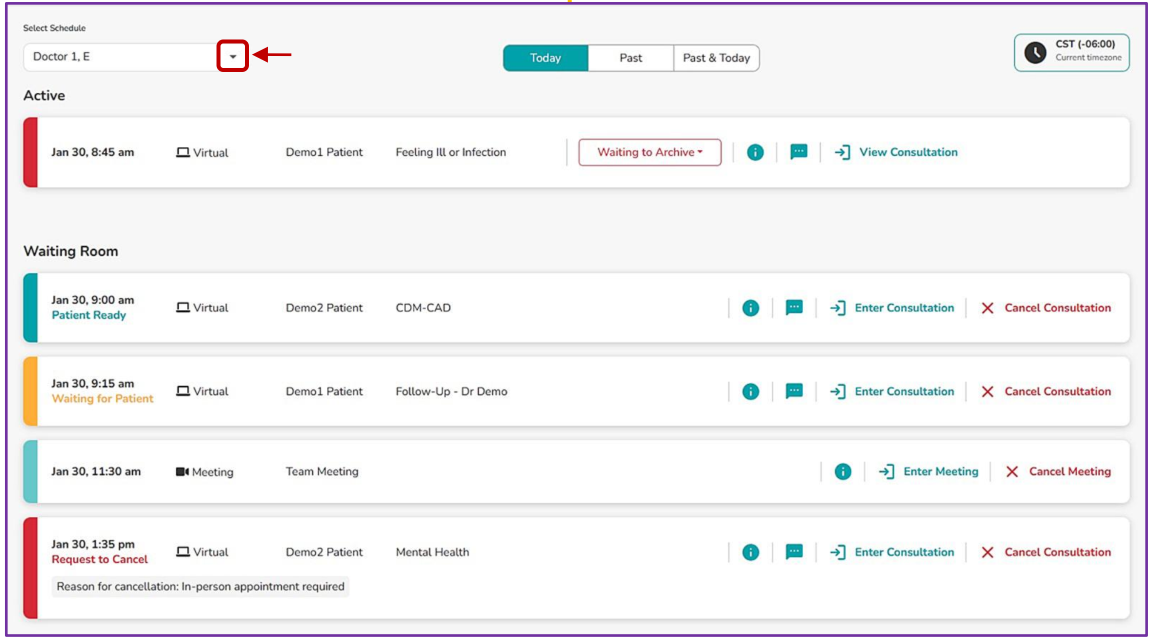
Scheduled video meetings and patient consultations can be accessed from two places in the dashboard, either the **Schedule** tab, or here on the **Active & Waiting** screen, which is designed to display a provider's schedule in booking sequence

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

- ❑ Select **Consults** in the dashboard, then click **Active & Waiting**



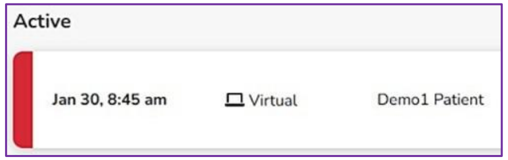
- ❑ Clinic admins must select the healthcare provider's name from the **Select Schedule** drop-down menu.



Active & Waiting Screen Headings & Color Schemes

Active:
Consultations you have entered and started communicating in:

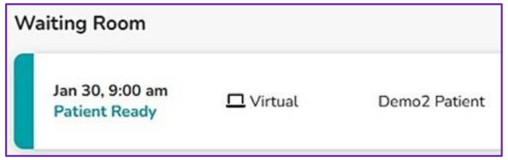
- Completed and 'Archived'
- Not yet 'Archived'
- The patient has not yet arrived or responded to you



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.

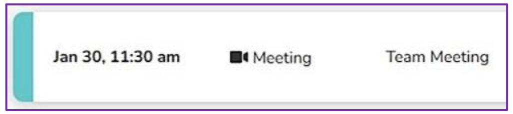
Waiting Room:
Scheduled Patient Consultations and Meetings:

- 'Patient is Ready'
- 'Waiting for Patient'
- Scheduled Video Meeting
- Patient 'Request to Cancel'



DARK TEAL – Patient Ready - the patient is marked as ready and is available for their appointment

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



LIGHT TEAL – scheduled Video Meetings

RED – patient has logged into their account and made a request to cancel the appointment

Active & Waiting Screen Features – Page 1

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

Active & Waiting Screen Features – Page 2

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

18. Start a Scheduled Patient Consultation or Video Meeting

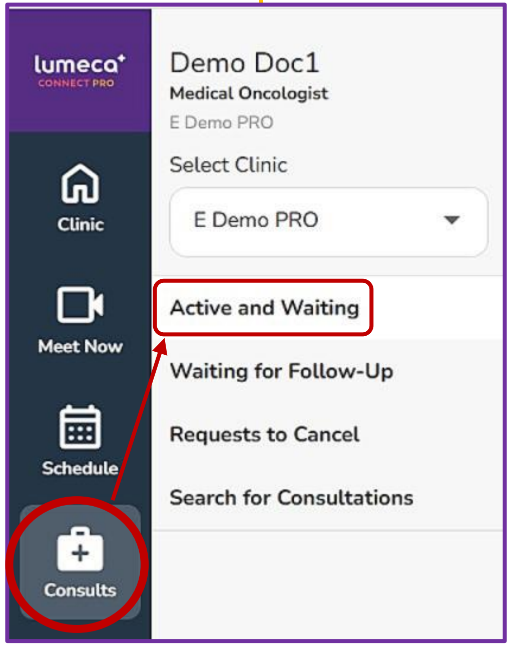
lumeca

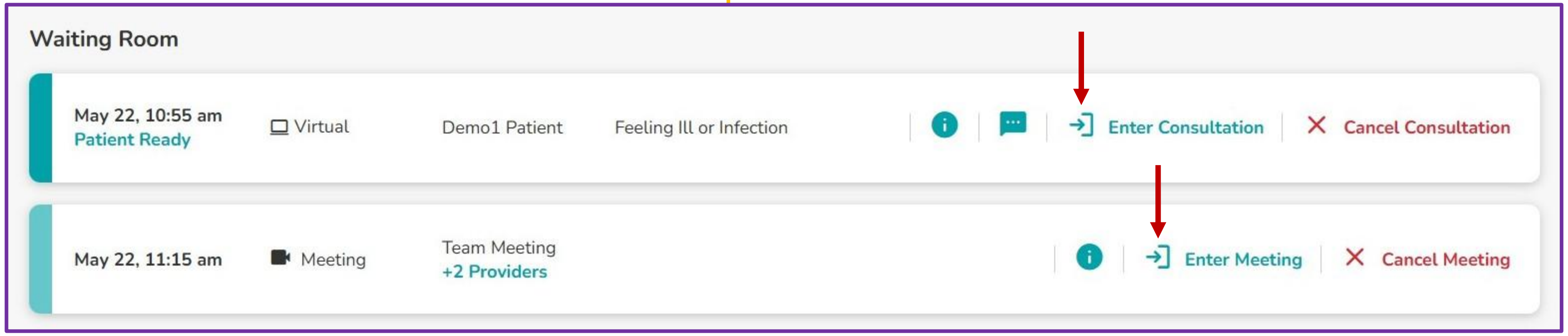
VIRTUAL CLINIC

Start a Patient Consultation or Video Meeting

- ❑ Click **Consults** in the dashboard
- ❑ Select **Active & Waiting**

- ❑ Click **Enter Consultation** or **Enter Meeting**





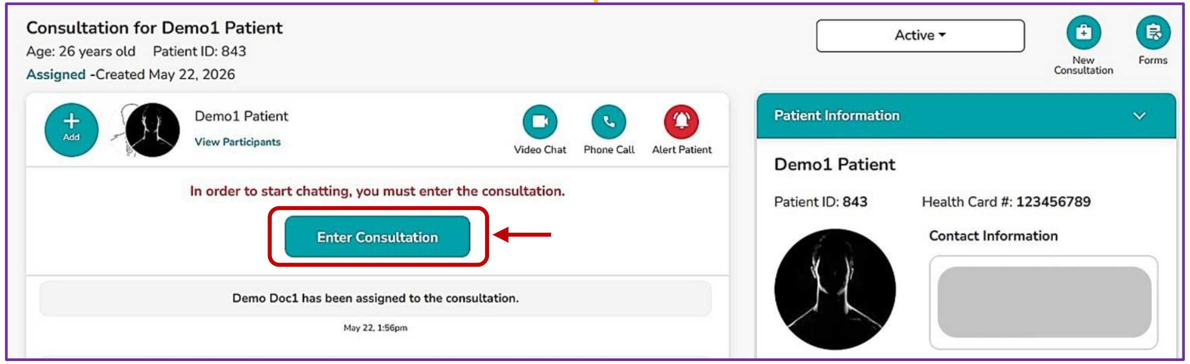
Continue to the next page for information on patient consultations.

Video meeting features are covered in Section 12 & 13 above.

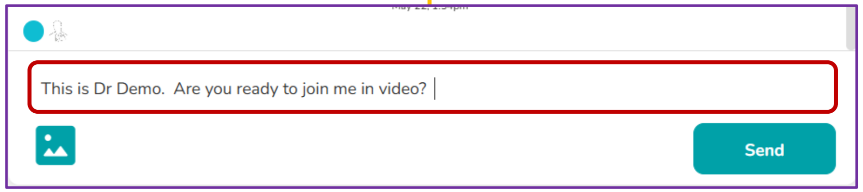
The Patient Consultation – Step 1

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

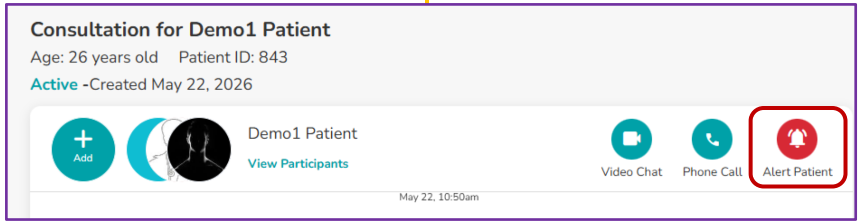
- ❑ Once you are ready to begin, click the **Enter Consultation** button. The patient will see *'Dr ~~~ has entered the consultation'*.



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



- ❑ Click **Alert Patient** if patients are not responding. Send them a quick message via SMS text or a message within the consultation itself.

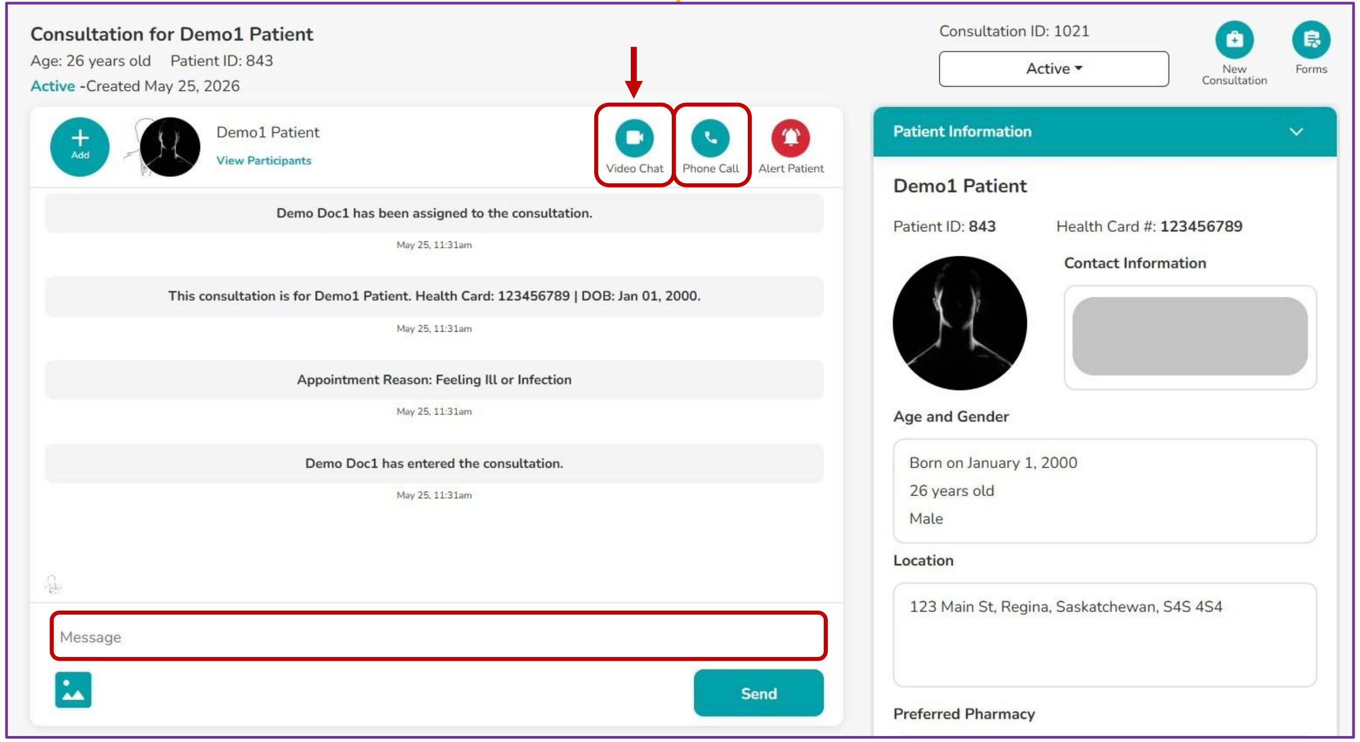


The Patient Consultation Video Chat– Step 2

The following options are available:

- **Video Chat** – begin the video portion of the consultation
- **Phone Call** – call the patient within this consultation, if video chat does not work
- **Message** – send a chat message to your patient/participant

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



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

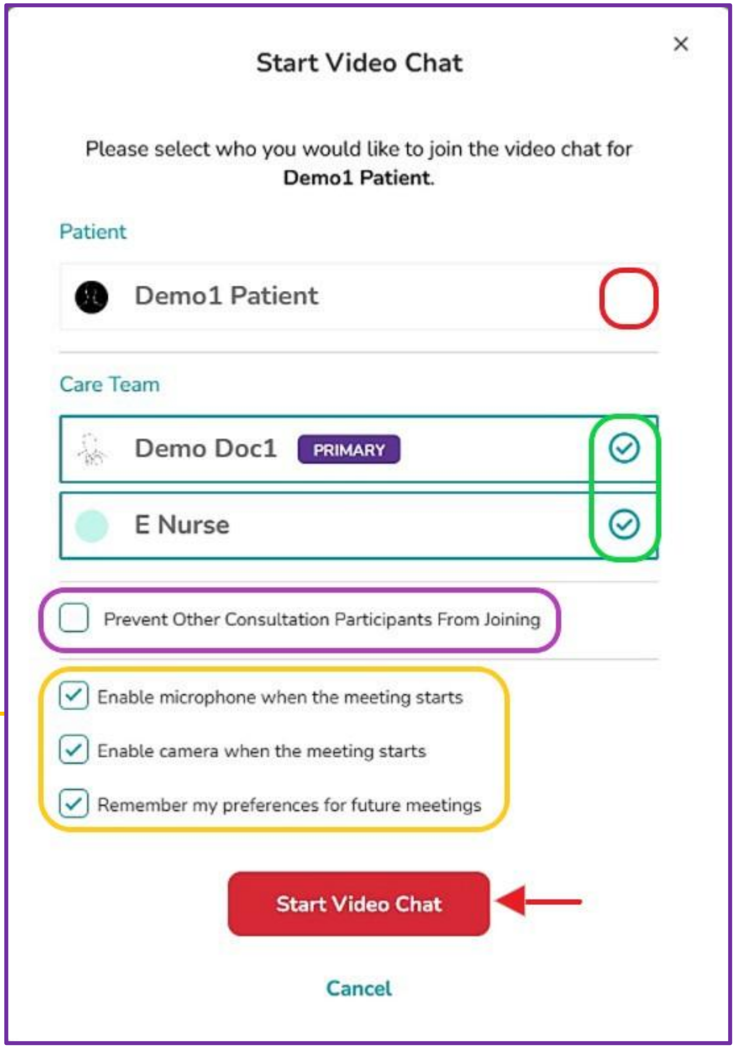
Start a Video in a Patient Consultation

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:
  - 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**.



End a Video in a Patient Consultation

With patient consultations, you can start and end as many videos as desired during an active consultation.

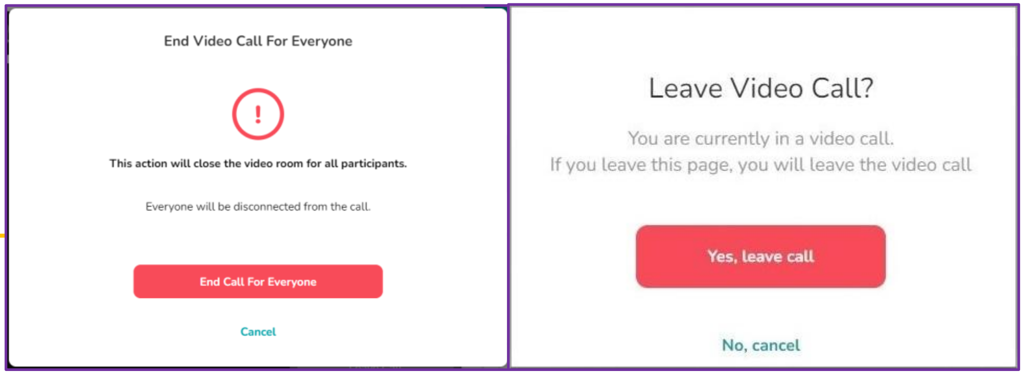
At the bottom-right corner of the screen, click the red **Leave Call** button.

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

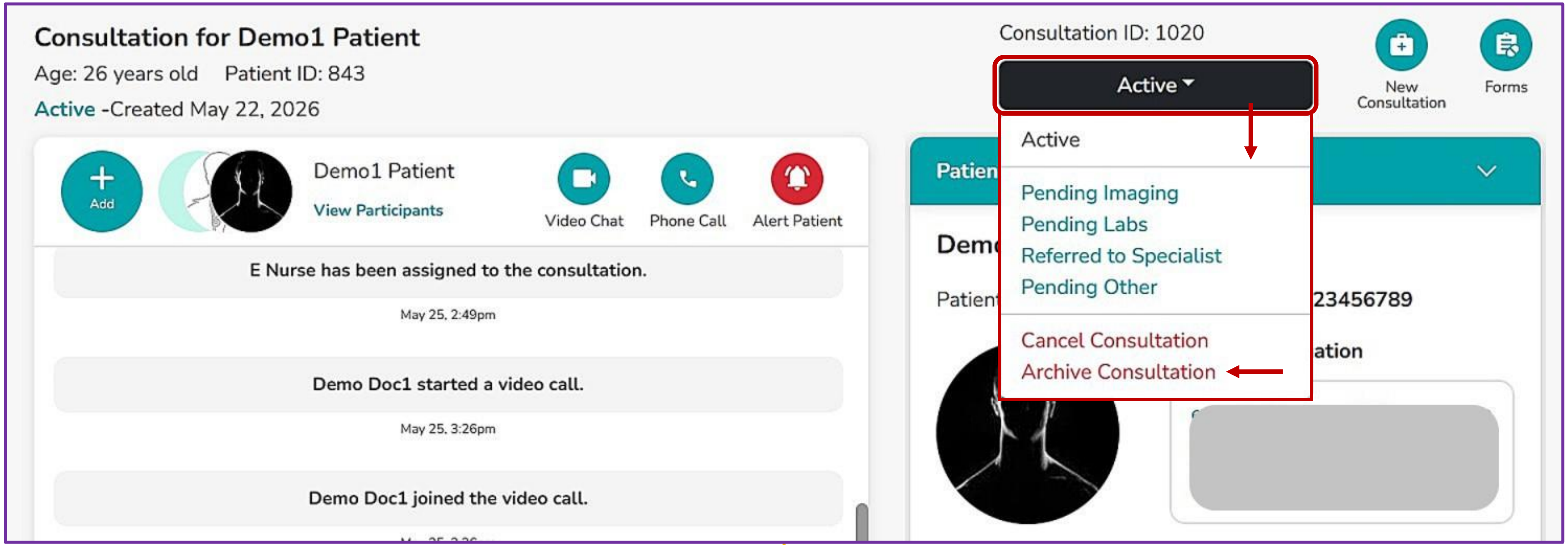
- **'End Call for All'-** will immediately end the video for the host and all other participants of the video chat. Important: if any of the host's care team members are present and click this button, they will also end the video for everyone.
- '**Leave Call**' - available to all participants in the video, the host, patient and others. Important: if the host or one of the clinic care team remain in the video chat, it will remain open. All others may **leave and return** if it is still active.
- 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.

Confirm your selection:

- '**End Call for Everyone**' – the video room will close for everyone.
- '**Yes, leave call**' – individuals can leave and rejoin the video if needed.



Archive Completed Consultations



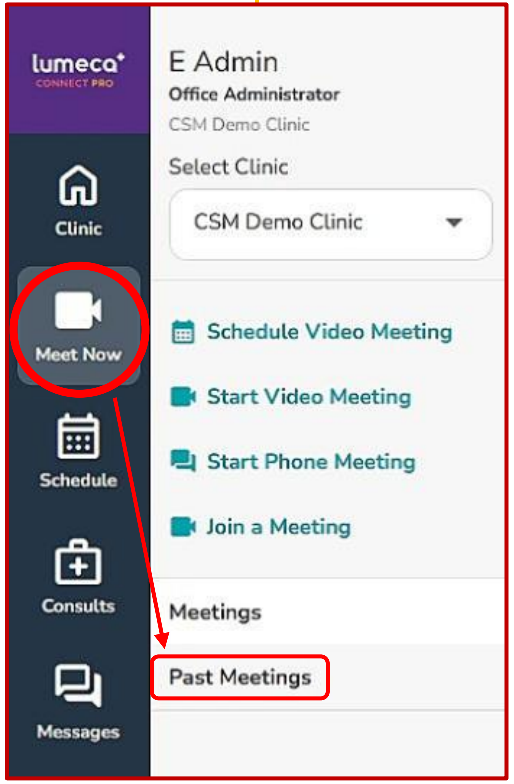
- [ ] When the consultation is complete, click the **Active** drop-down and choose **Archive Consultation**.

- Once **Archived**, consultations remain on the **Active & Pending** 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, locate them under **Consultations** > **Search for Consultations**.
- **Note**: unarchived consultations remain Active to both the clinic and patient and can create backlog and confusion.

19. Search for Past Sessions

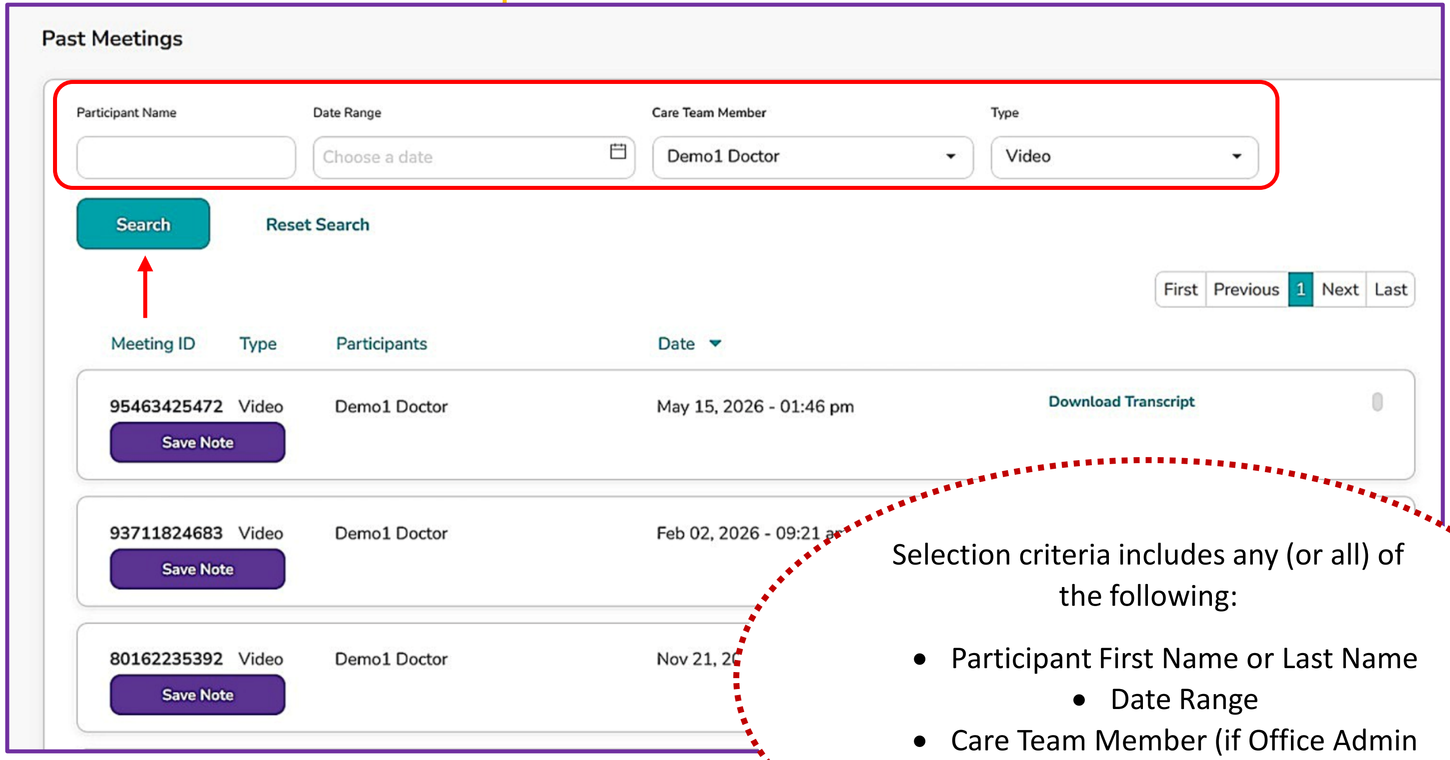
Past 'Video Meetings'

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



The most recent meetings will be listed, or

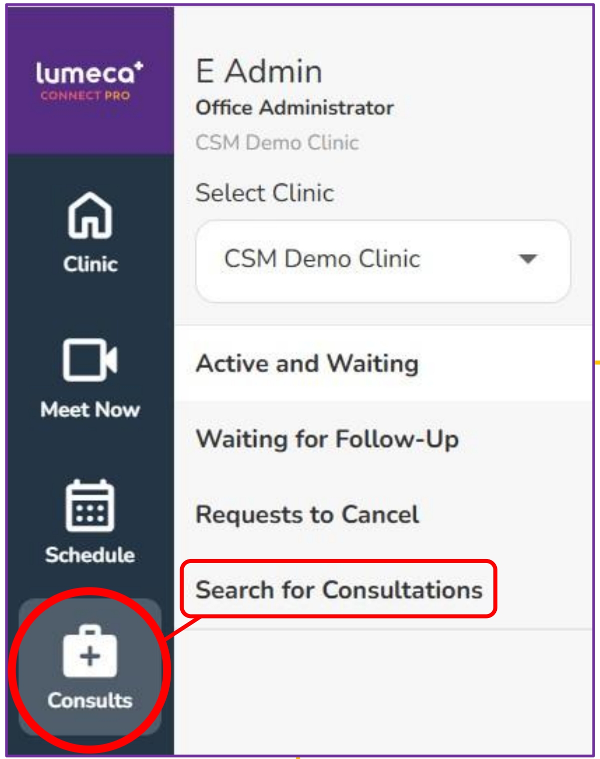
- ❑ Use the search criteria to find a specific meeting

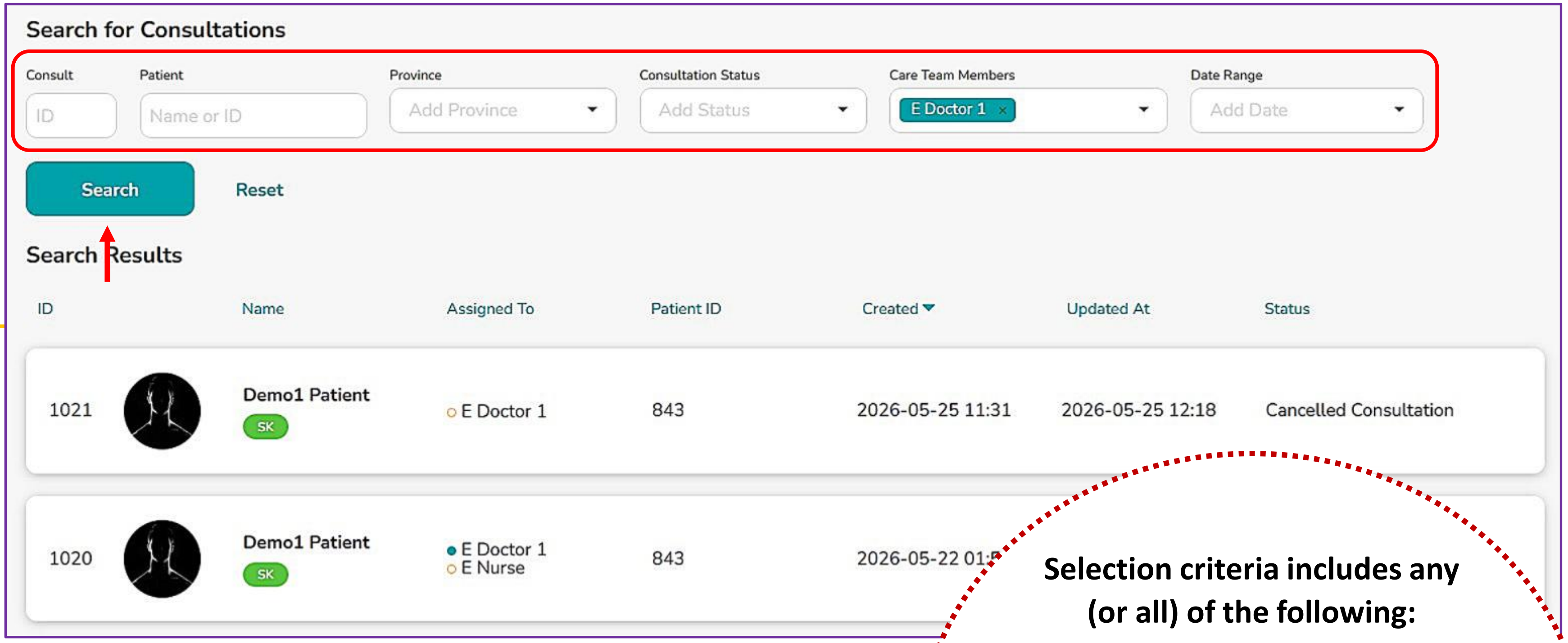


Selection criteria includes any (or all) of the following:

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

Past 'Patient Consultations'





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

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

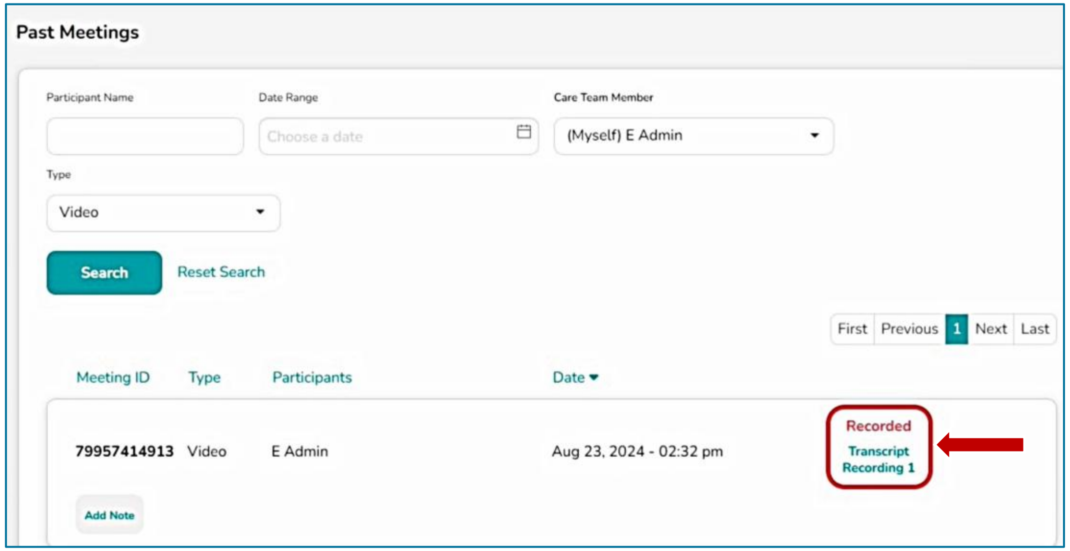
- **Consult ID**
- **Patient First Name, Last Name, or Health Number**
- **Province**
- **Consultation Status**
- **Care Team Members**
- **Date Range**

Finding Recordings of Video Meetings / Consultations

Video Meetings

Past Meetings can be found under:

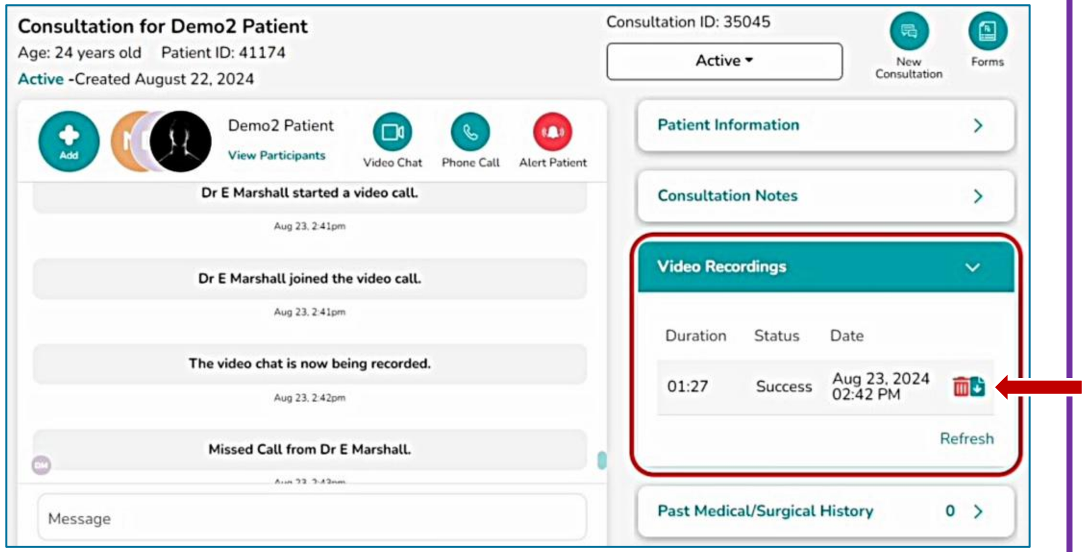
- Meet Now > Past Meetings
- Select the meeting from the list or search for it.
- If recorded, a video recording will be available to view after approximately one hour.



Patient Consultations

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

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



20. The ‘Messages’ Feature.

The ‘Messages’ Feature

Clinical users who have this feature enabled can initiate or join messages with others within the **Lumeca Health** platform.

These conversations operate independently and are distinct from:

- Video meetings, and
- Patient consultations

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

- Clinic users with registered Lumeca accounts, and/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.

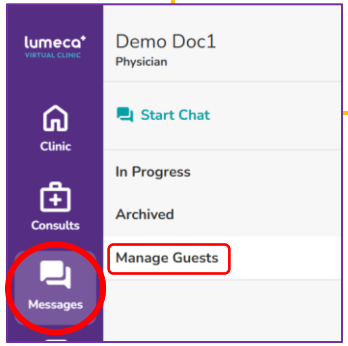
You may:

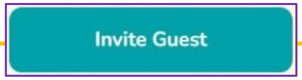
- ❑ **Invite Guests**
- ❑ **Archive Guests**

- 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.

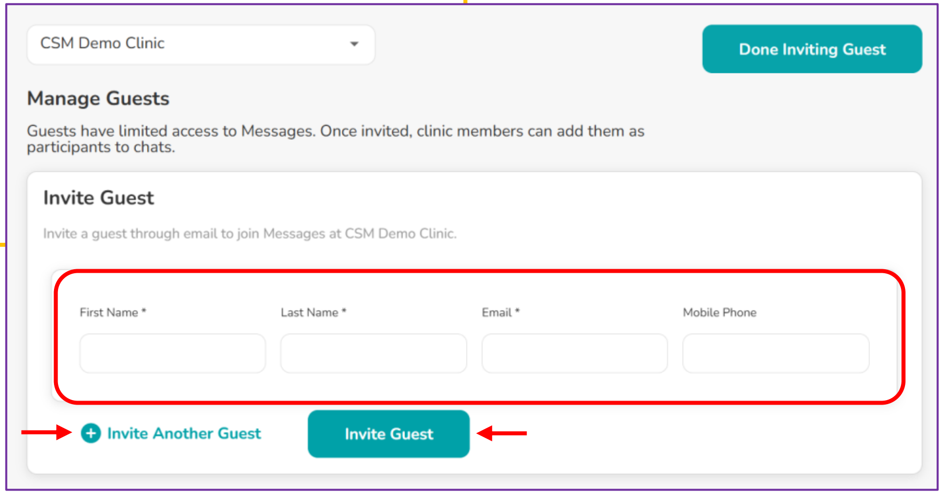
Invite Guests

1. Click **Messages** on the left navigation bar, then choose **Manage Guests**.
2. Click the **Invite Guest** (top-right of screen).
3. Fields with an asterisk must be entered. Enter your guest's first name, last name and email address. Mobile phone # is optional.





4. Click **+Invite Another Guest** to invite more than one person.
5. When your list is complete, click **Invite Guest**.

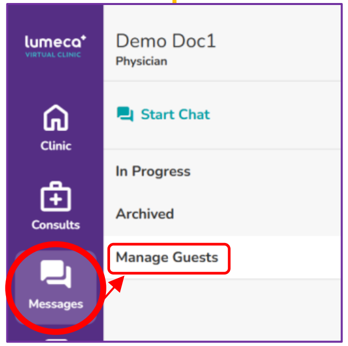


Guest Status

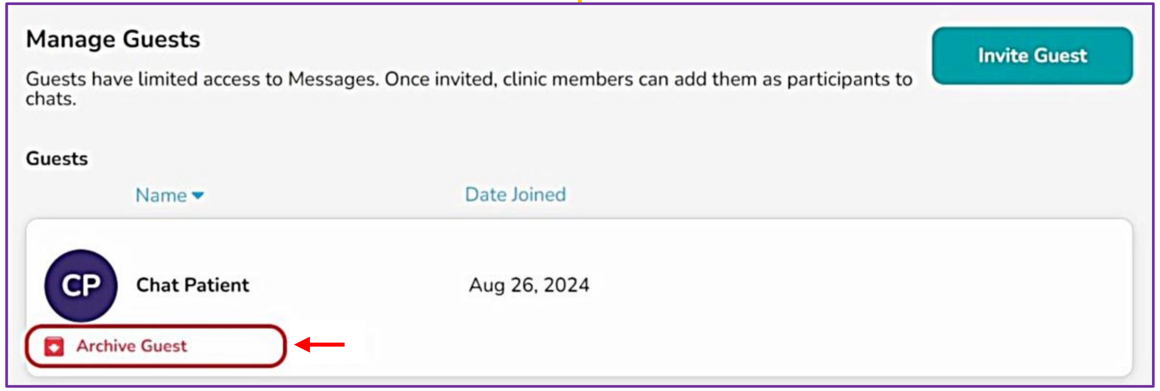
Guests	Invited Guests	Archived Guests
Those who **have accepted** their invitation to join a message and have created a Lumeca 'Guest' account. Their name will appear in your drop-down list when inviting participants to join your messages.	Those who **must still accept** their invitation and create a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

Archive Guests

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



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



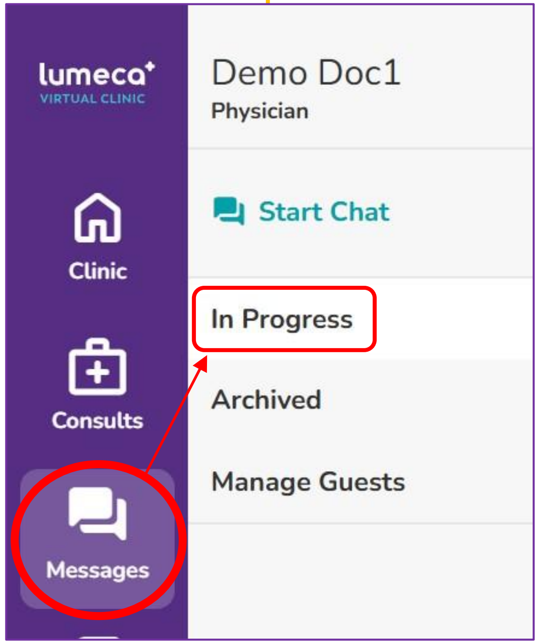
3. Confirm by clicking **Yes, Archive Guest**.

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.

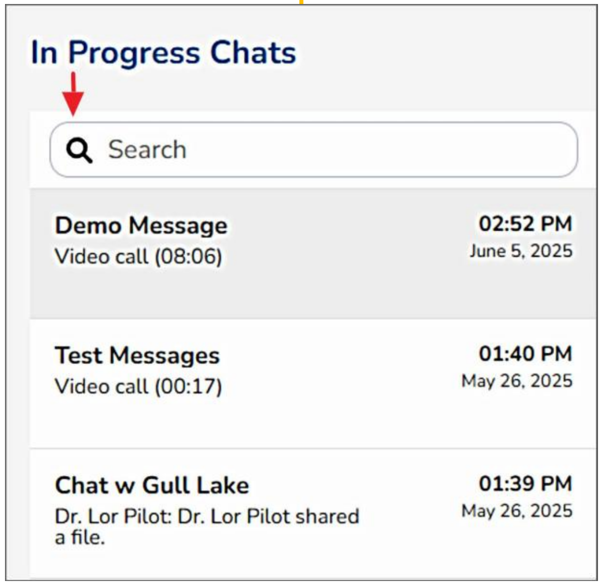
Active Messages in Progress

1. Click **Messages** on the left navigation bar, then choose **In Progress**.



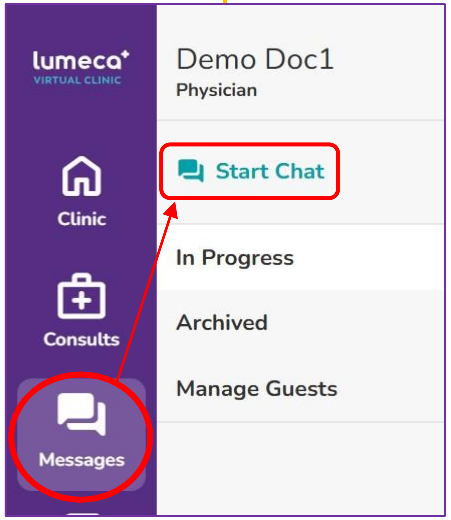
2. Your active messages will be listed, with the most current message at the top OR you may **Search** for a specific message by title, Chat ID # or participant name.

3. Once located, click onto the message to enter it.

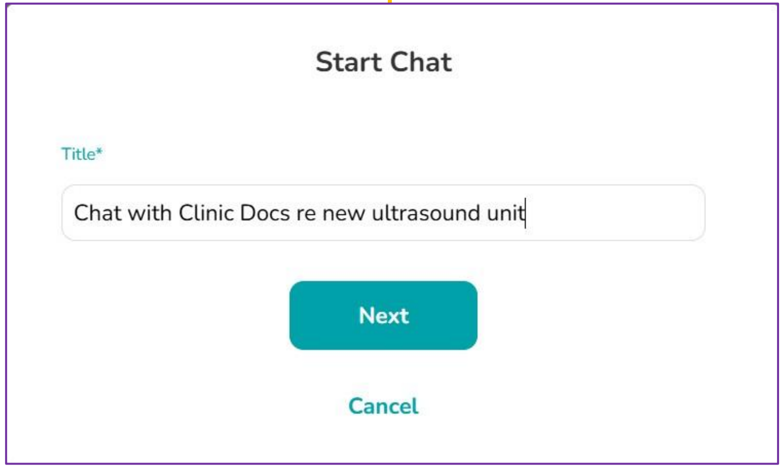


Start a New Message

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



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



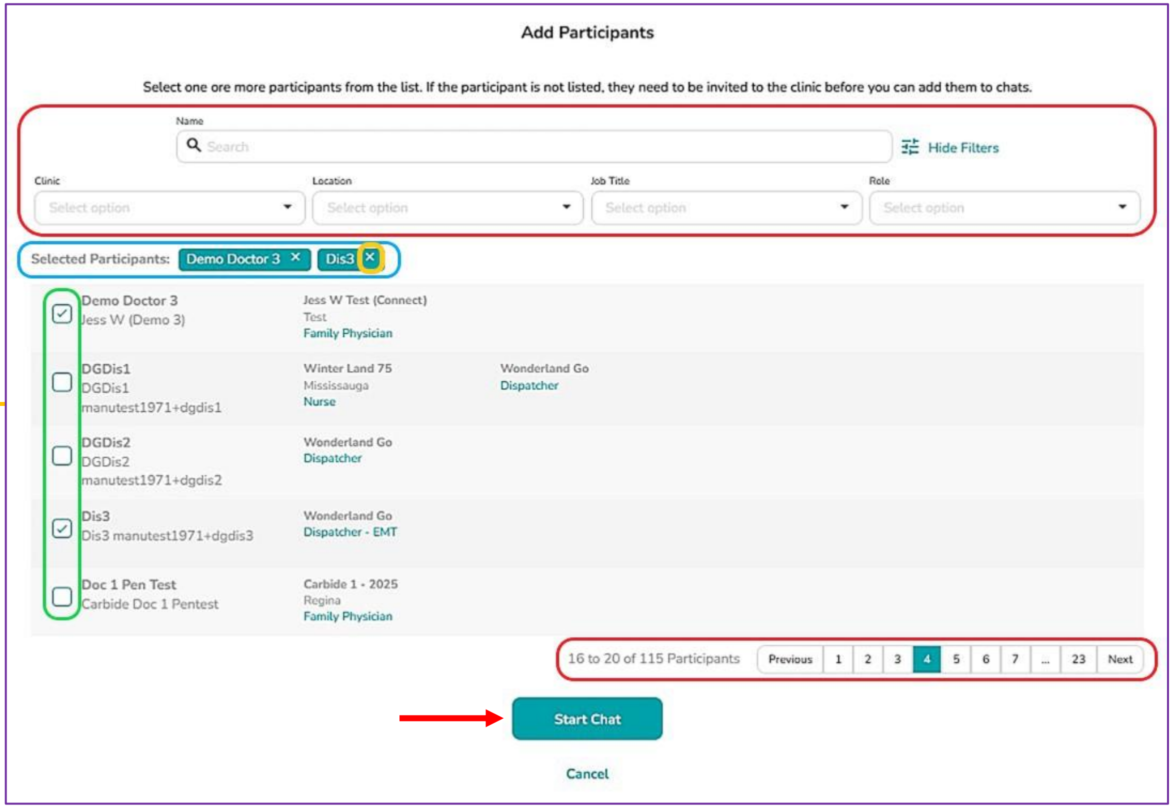
Start a New Message – cont'd

3. Add Participants - At least one other participant besides yourself must be added to initiate a new message.

- ❑ To select your participants, **check the box beside their name**.
- ❑ To find your message participants, **either**:
  - Scroll through the list to find them, or
  - Start typing in a name in the **Name** field, or
  - Use any or all the **Search** filters to narrow down your search.

Your selected participant(s) will be listed beside **Selected Participants**

- ❑ To **Remove** a selected participant, simply **uncheck them**.
- ❑ When your participants list is ready, click **Start Chat**.



Overview of the Message Screen

1. Name of Message

2. List of invited participants

3. **View Participants** button – displays a list of invited participants, with the option to 'Remove' participants as well

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

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

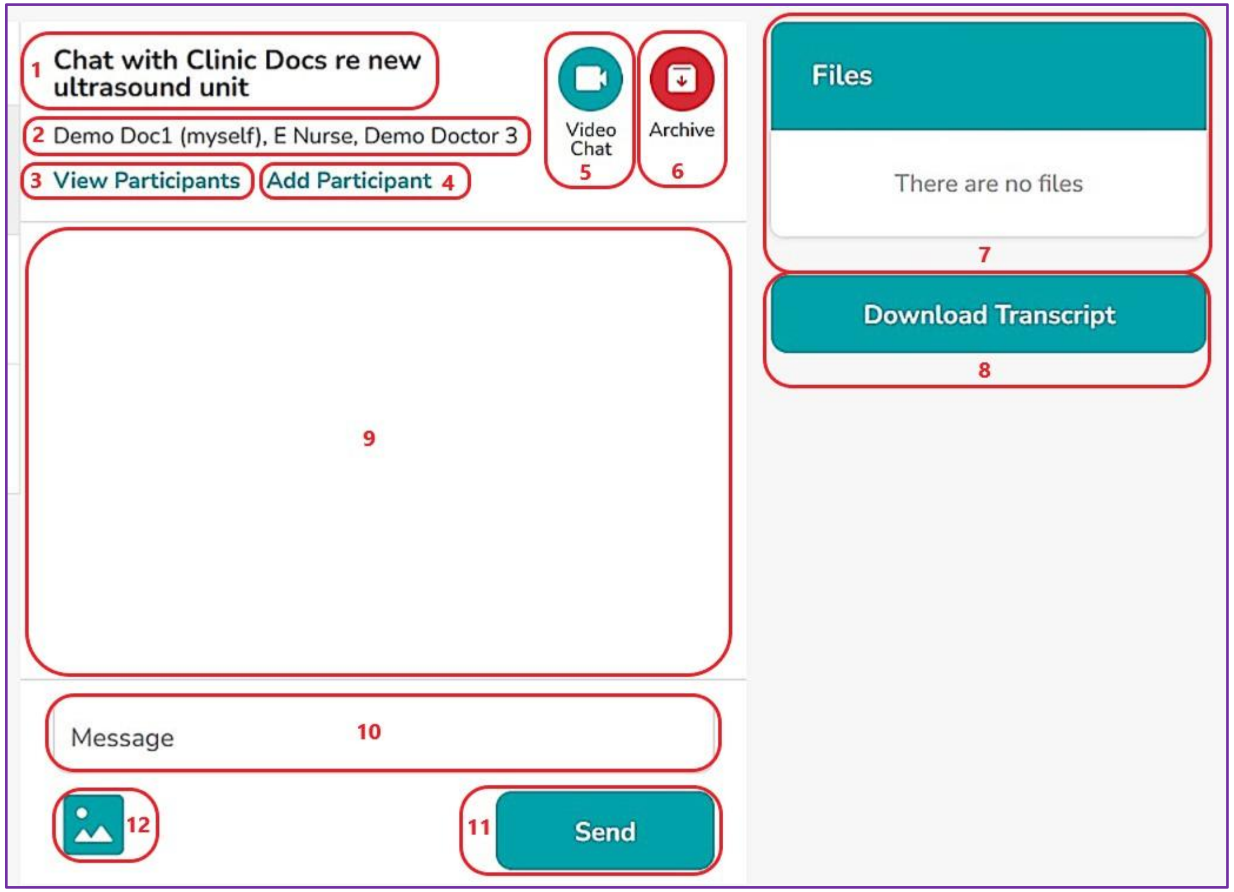
8. **Download Transcript** – downloaded chat messages and shared files

9. Message chat window – where the conversation appears

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

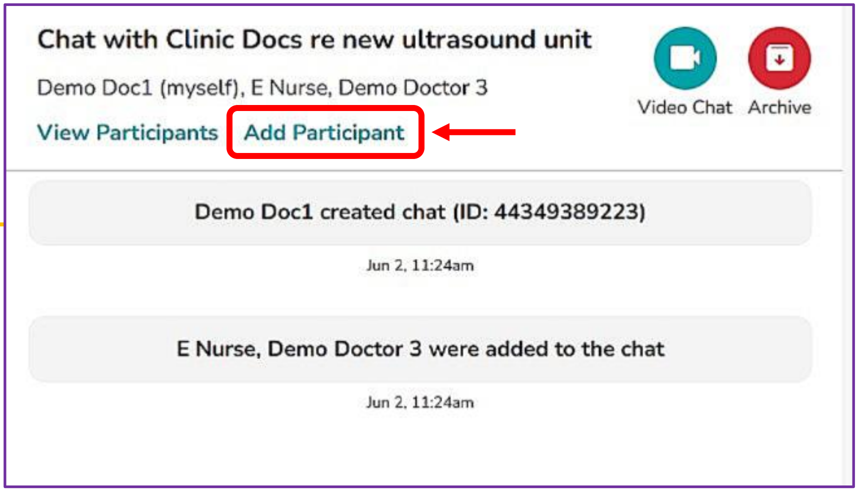
11. **Send** – click to send a chat message

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



Add Participants to an Active Message

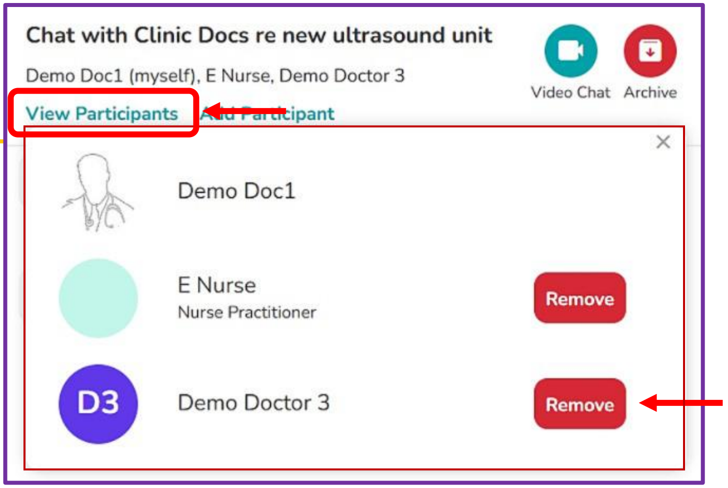
1. Click **Add Participant** near the top of the message screen.
2. Select the new participant(s) following the instructions on page 112 of this document.
3. When your participants list is ready, click **Add Participants**.



Remove a Participant from an Active Message

1. Click **View Participants** near the top of the message screen.
2. Click **Remove** beside the participant you wish to remove from this message.

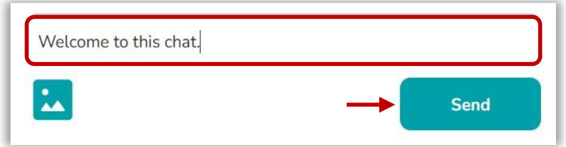
The participant will no longer be able to access or participate in this message.



Chat Messages

Send a chat message:

- ❑ Type into the **Message** field, then click **Send**.



Unsend a chat message:

- ❑ Hover over a message that you have sent and tap **Unsend Message.**
- ❑ Add a **Reason**, then confirm by clicking **Unsend Message**.

The message will be replaced in the chat window with the words, **Message Unsent**.

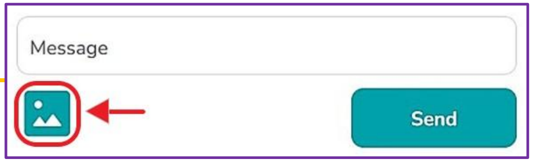
Resend a chat message:

- ❑ Hover over a message that you have hidden and tap **Show Message**.
- ❑ Confirm by clicking **Resend Message**.

All participants will be able to see the message again in its original location.

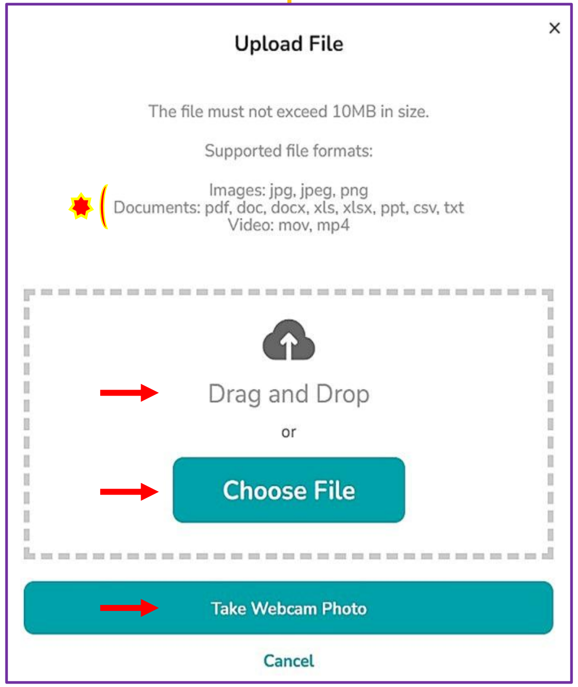
Upload Photos, Documents & Videos

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

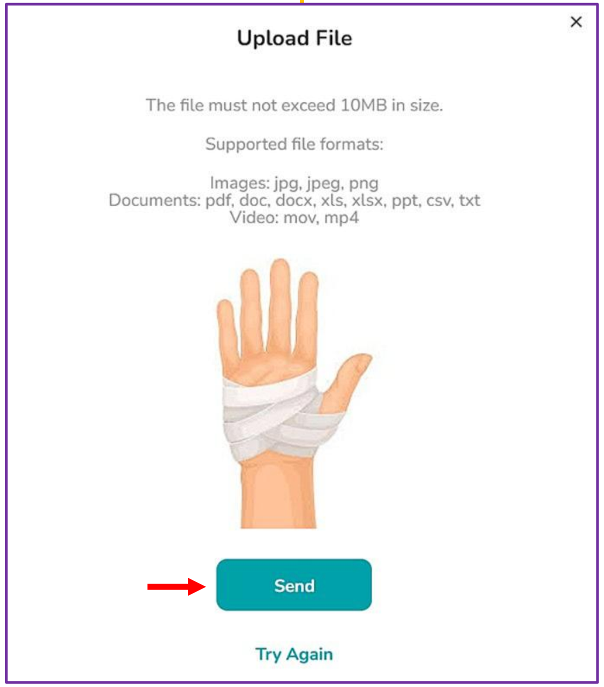


- ❑ Use one of the three options available to upload a file. Ensure you are uploading one of the supported file formats listed *.

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.



Upload Photos, Documents & Videos

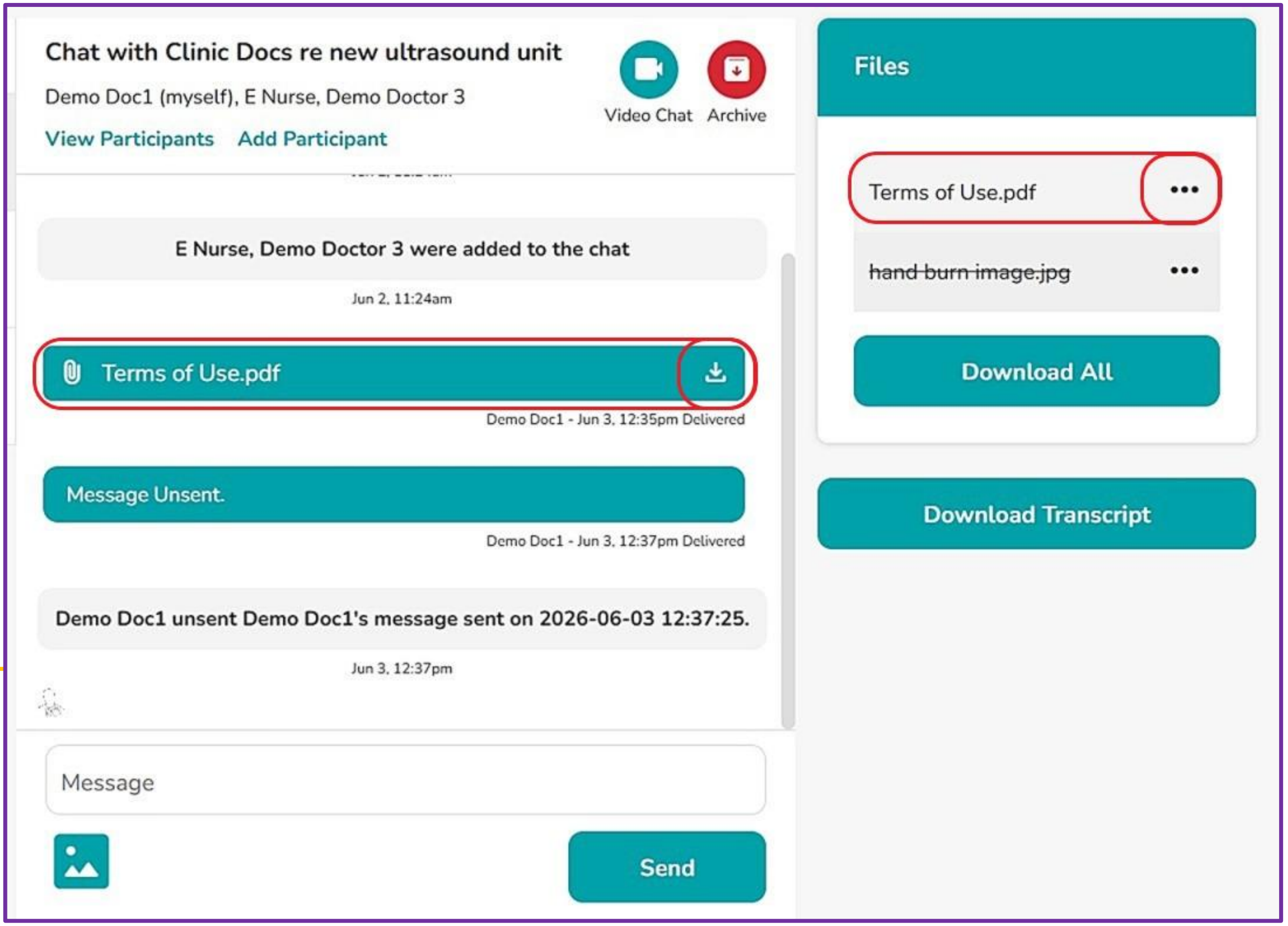
Uploaded Documents or Videos

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.

It is important not to download files onto your personal device.

Download a File

- ❑ Click on the file name in the Chat message area, **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**.



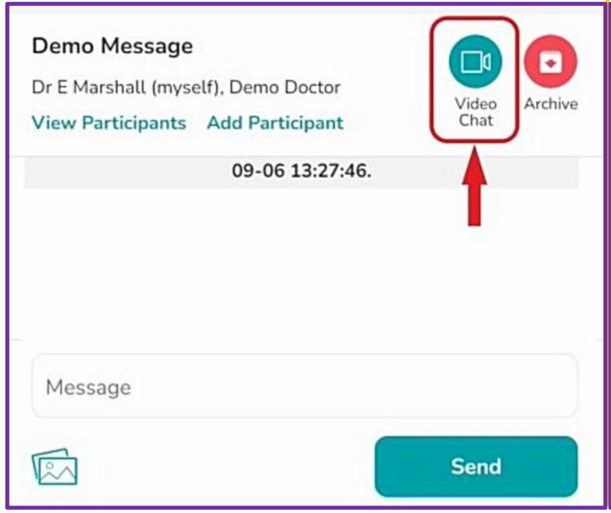
Unsend/Re-send a File

Uploaded files may be unsent or re-sent.
Refer to the previous **Chat Messages** screen for instructions.

Start a Video Call While in a Message

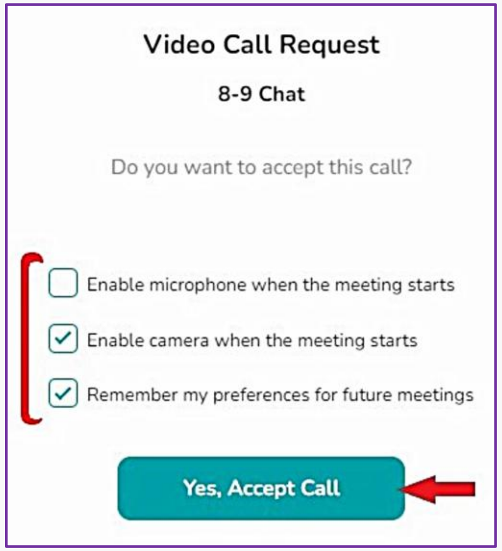
- ❑ When in an active message, click **Video Chat**.
- ❑ Check to enable your microphone and camera and to remember your preferences for future video chats. These permissions grant camera and microphone access within the video itself.
- ❑ When ready, click **Start Video Chat**.

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 the Video

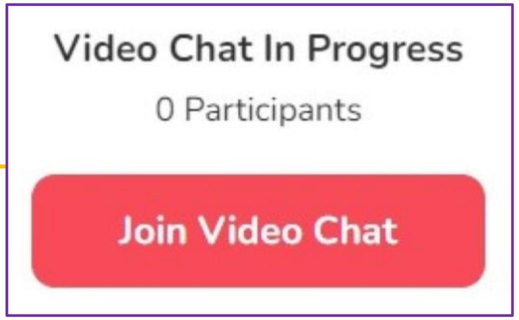
- ❑ Click **Leave Call** on the bottom of your screen.

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

Anyone who leaves an active video chat will see the message, will see the message, **Video Chat in Progress**. This message remains visible until the message host ends the video or once everyone leaves the video.

Participants may re-join the active video by clicking, **Join Video Chat**.



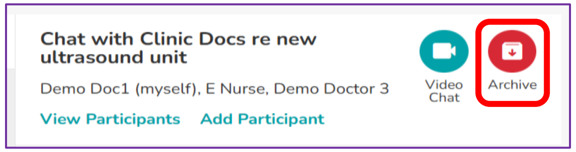
Archive, Find Archived & Unarchive Messages

Messages may only be archived/unarchived by the message creator or users with permission to do so.
If you need users within your clinic to have this permission, please contact Support – *see last screen*.

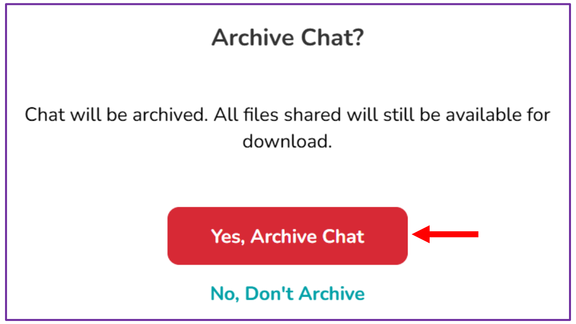
When archived, changes cannot be made to a message however, files uploaded within the message may be accessed.

ARCHIVE A MESSAGE

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



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

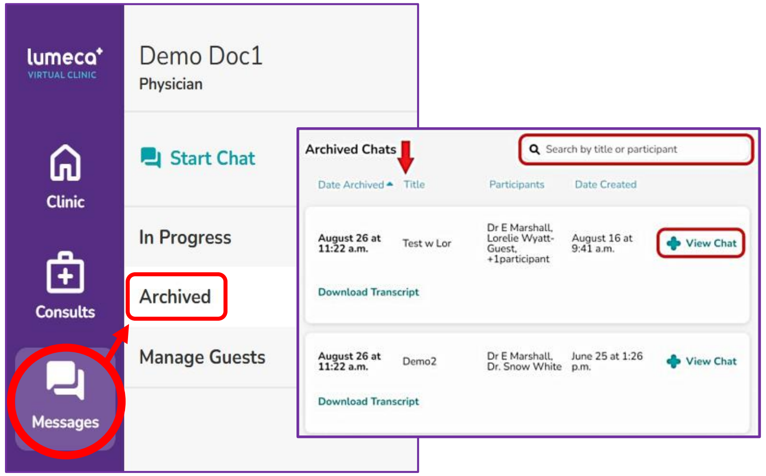


The message will move from **In Progress** to **Archived** (*under the **Messages** tab*).

FIND ARCHIVED MESSAGES

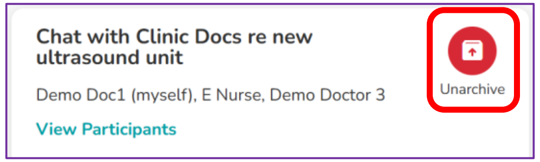
- ❑ From the left navigation bar, click **Messages**, then choose **Archived**.

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.



UNARCHIVE A MESSAGE

- ❑ Find the archived message. 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. Contact Us for 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