ACTIVE PATIENT PORTAL (APP) TRAINING WORKBOOK 4.17

MAN2003

Version 4.17

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Section 1: Clinical User Training

Lesson 1: EQUICARE Login and Navigating the Home Page

Key information for this lesson is:

Website URL: ____

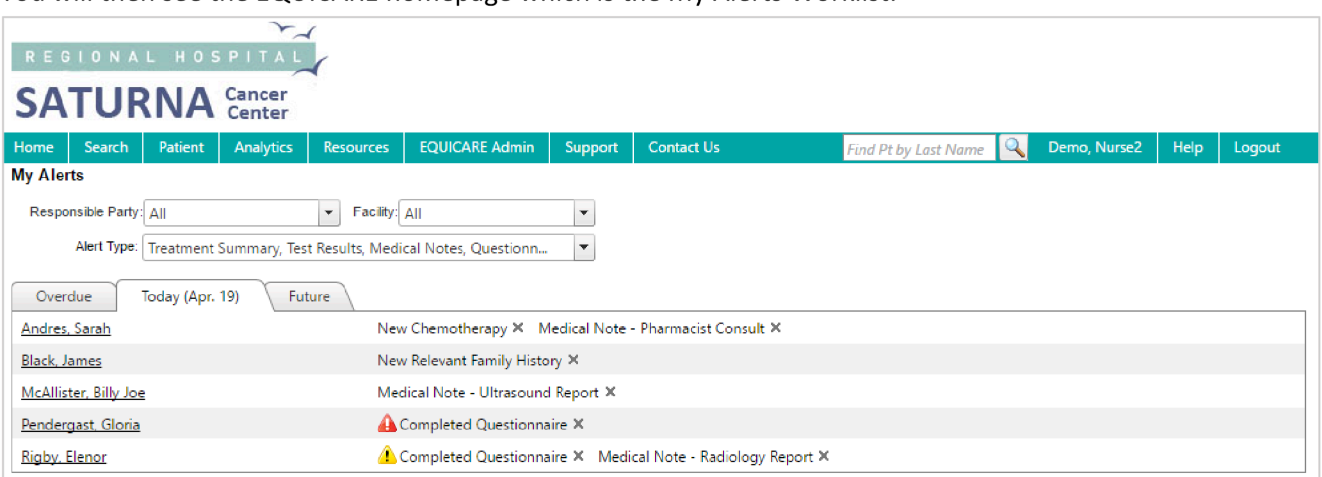
Your user ID: ☐ Same as intranet user ID or ____________________________________

Your password: ☐ Same as intranet password or ___________________________________

Important information about logging in and the home page

- The worklists that you are able to access are dependent upon your user rights.
- Once logged in, the default screen is the My Alerts worklist.
- You must first select a patient (have a patient identified in "Current Patient") to be able to choose an item in the Patient menu.
- The Help function on the Navigation bar will provide information related to the task that is on the main screen at that time.
- Clicking on the user name allows the user to self-manage their account as well as access Emergency Access mode (if enabled).

1. Go to the website to access the login page (URL above)
2. Enter your user ID and password. You will need to select a new password the first time you login.
3. You will then be asked to acknowledge the terms of use for the Equicare software. Acknowledge the terms of use with the acceptance buttons at the bottom of the page.
4. You are then asked to confirm your e-mail address. This step is done to ensure that your e-mail address is correct in case you have forgotten your password and need to reset it.
5. You will then see the EQUICARE homepage which is the My Alerts Worklist.



Blue Navigation bar:

- Left side of the bar controls access to worklists, patient related functions and resources for clinical users.
- Right side of the bar supports a search function (by last name), the help menu (which will lead the user to a help section specific to the task in the main screen), access to the clinical users account (by clicking on their name) and the logout.

6. Mouse over each of the tabs on the Navigation bar to access functionality.
7. The Navigation Bar, Actions list, and Current Patient window are visible on all of the main Equicare pages.

In the event that a user cannot remember their password, the Equicare log-in screen has a Forgot Password link. This link can be used by patients or clinical users. Using this option sends a new password to the e-mail address linked to the user.

Multi-Factor Authentication

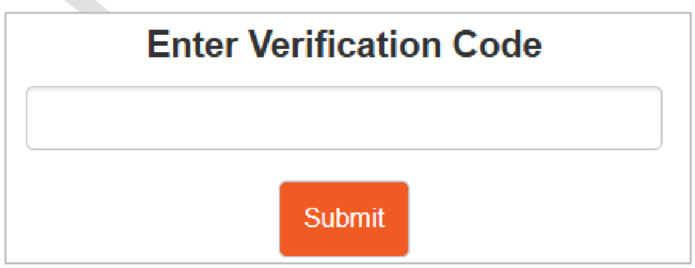
To increase security, Multi-Factor Authentication (MFA) is available as an option for users of the Care Provider Portal. Each user account can have MFA enabled or disabled independently, and an Administrator can choose to toggle MFA on or off for all users at once.

To use the MFA feature, it must be enabled for your user account, and you must install an authenticator app on a device you possess (such a smartphone or tablet). Any standard authenticator app downloadable from an app store will work.

To set up MFA for your account, log in to your Equicare account with your username and password, open the authenticator app on your device, log in and either:

a) Use its QR Scanner feature to scan the QR code on the MFA Setup page (you *cannot* use you device's internet browser or camera app to do this).
b) Enter the Setup Key provided on the MFA Setup page.

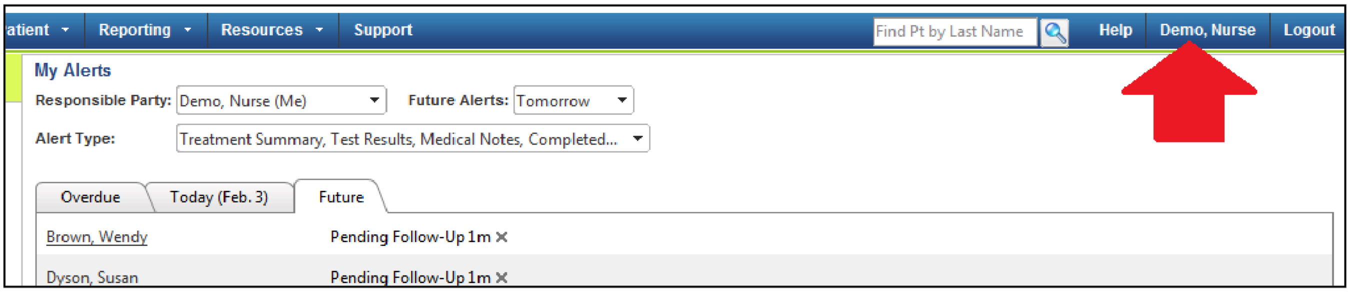
Then enter the verification code provided by the app.

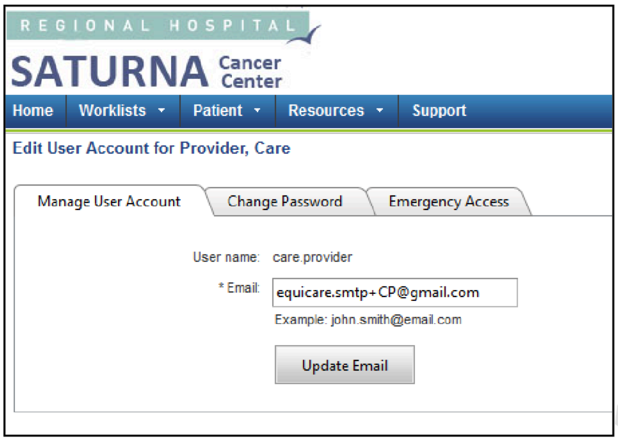


After you set up MFA for your account, you will be required to enter a verification code each time you log in (after providing your username and password).

Clinical User Account Self- Management

If the user is logged in to Equicare, they can click on their user name (on the Navigation bar, left side) to manage their own account.





The Edit User Account screen will be displayed.

Manage User Account - allows the user to update their e-mail address

Change Password - allows the user to change their password.

Emergency Access - allows users to temporarily access all patients in the Equicare system. The user does not have to be a member of the patient's care team or in the patient's workgroup to access the patient's information if needed on an emergency basis.

Lesson 2: Worklists

The worklists that a care provider is able to access are based upon their permissions set up by an Administrator. Worklist permissions are typically as follows:

- **My Alerts:** Users managing patients have access to this worklist.
- **Patient Search:** All users have access to this function. The user can find patients that they have access to (based upon permission settings).

User role permissions and workgroups are discussed in **Section 2: Equicare Administrator Training**. Details on the Patient Search are included in Appendix A for users with access to this function.

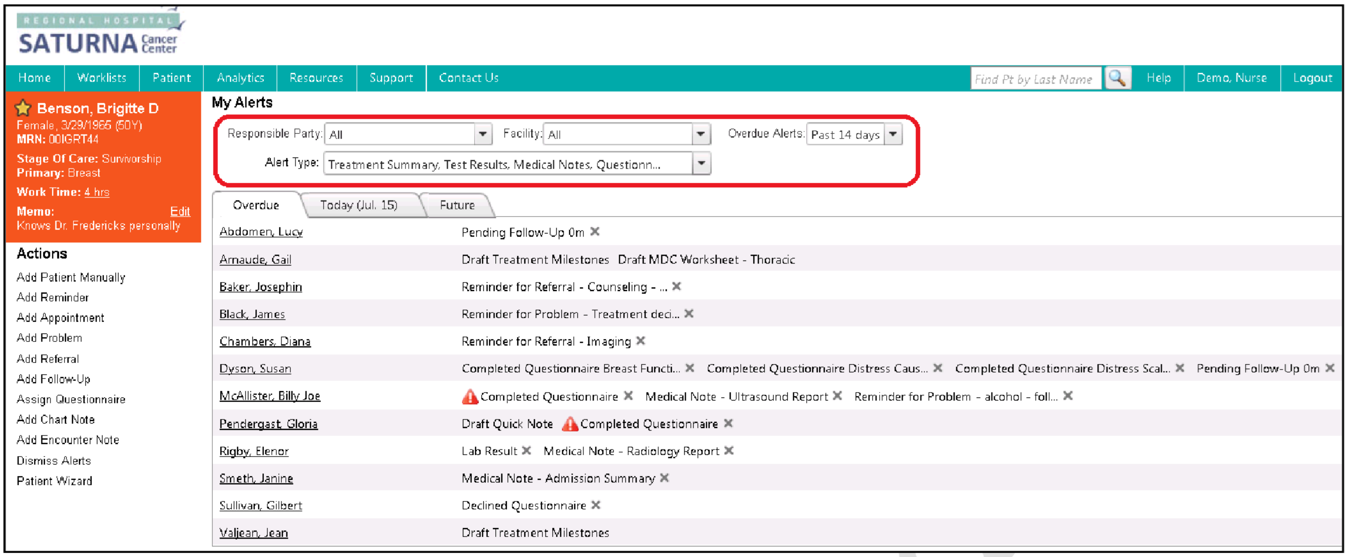
Important information about Worklists

- Patients which are not active ("Pending") can only be found through the Patient Search. Only users who have permission to find all patients are able to find pending patients through patient search.
- The My Patient Worklist display shows all of the patients you are associated with through the care team in alphabetical order.

My Alerts

The My Alerts worklist is the default screen upon login. It is designed to give immediate feedback on items that have been updated or are pending.

The My Alerts worklist will show:
- Changes or additions to the Treatment Summary
- New Test Results or Medical Notes
- Questionnaires which have clinician alerts associated with them
- Reminders that the user has set for themselves



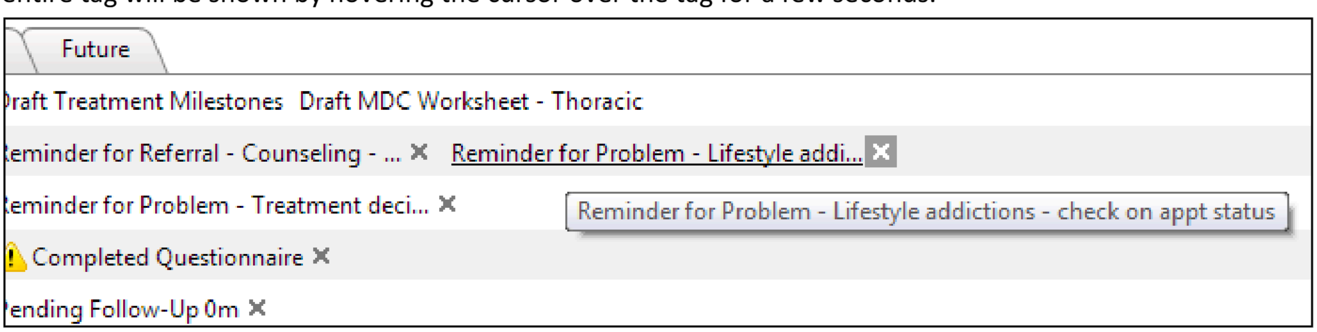
The My Alerts window allows filtering by (circled in red above):

- Responsible Party: select the user to view their alerts
  - Users that will show in the Responsible Party list are:
    - the logged-in care-provider
    - all care-coordinators (with or without alerts)
    - all care-providers with alerts
- Facility: select from facilities where the logged in user works
- Time Frame: available in the future and overdue alerts tabs
- Alert Type: filter by checking and unchecking the box in front of each type

The options selected in each of these filters will stay the same if the user navigates away from the window and then returns back to it.

Alerts that are created by the Equicare system will show in the My Alerts list of the person who is designated as the Care Coordinator. The Alert can be seen by other members of the care team if they view the My Alerts worklist of the Care Coordinator.

Each different Alert Type is identified by an explicit Alert tag. Some of the tags will be long so will be truncated. The entire tag will be shown by hovering the cursor over the tag for a few seconds.



Clicking on the Alert brings the user to the patient activity item. See **Lesson 4, Patient Related Activities**.

Once the user has reviewed the item, they can click on the Return button to go back to their My Alerts screen. The alert will have been dismissed and will no longer be visible. The alert cannot be reactivated.

To dismiss an Alert without viewing the item, the user can click on the X associated with the Alert tag. Once clicked, the alert will have been dismissed and will no longer be visible. The alert cannot be reactivated. Clicking the patient name will lead the user to the Patient Alerts window which displays all the outstanding Alerts for that patient.

Patient Search

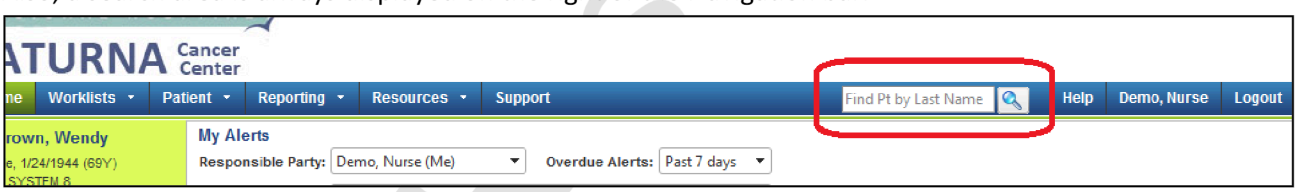
Go to the *Worklists* menu and click **Patient Search**. Searching can be done based on:

- Patient Last Name
- Patient First Name
- MRN
- Diagnosis

Enter the search term(s) desired in the appropriate field(s). Select Search. Results will be displayed in the grid below the search terms. The search function will return any patient that the user has access to that meets the search criteria. For example, if the care provider has access to Pending patients (All Patients in Selected Facilities), the care provider will see pending patients in the search results. A care provider without this access will not see those patients.

When the search function returns a list of patients, click on the row of the appropriate patient to put the patient into context in the Current Patient window (colored box, upper left). The user can now access this patient's information through the Patient functions on the Navigation bar.

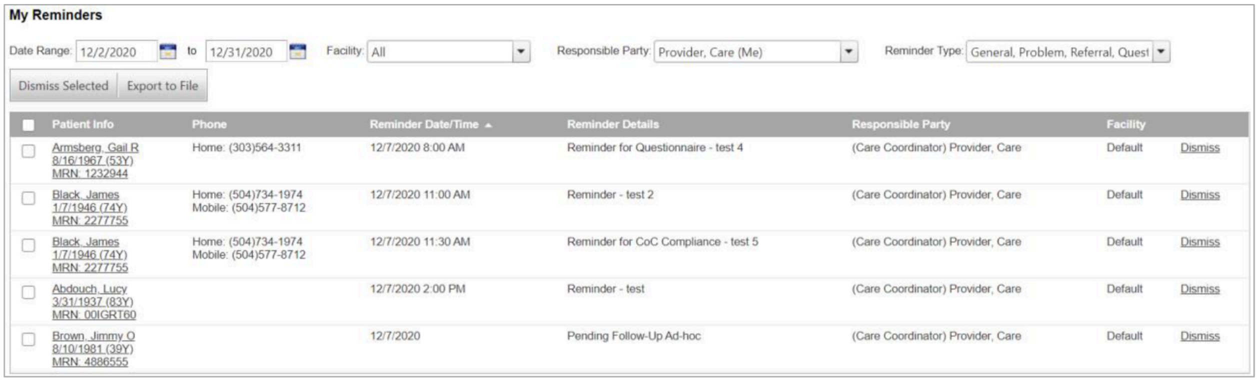
Also, a search area is always displayed on the right of the Navigation bar.



The search box is designed to search by last name only. Entering a last name in the box will change the main view to the Patient Search screen. The last name will be filled in the Last Name box and patients matching the search criteria will be displayed.

My Reminders

The *My Reminders* worklist helps you keep track of Reminders, including both yours and those for other people on your team. *My Reminders* can be found within the Worklists menu.



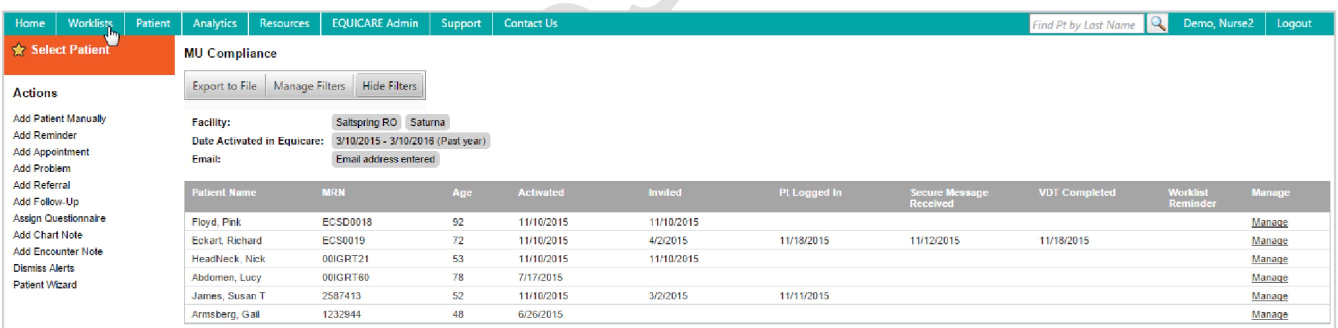
Reminders can be filtered according to Date Range, Facility, Responsible Party (i.e. to whom the reminder is assigned), and the Reminder Type. From the list of Reminders you can put the patient in context, open the reminder for review and editing, or dismiss the reminder.

The option to *Export to File* will export the details of each Reminder currently displayed in the worklist.

Compliance Worklists

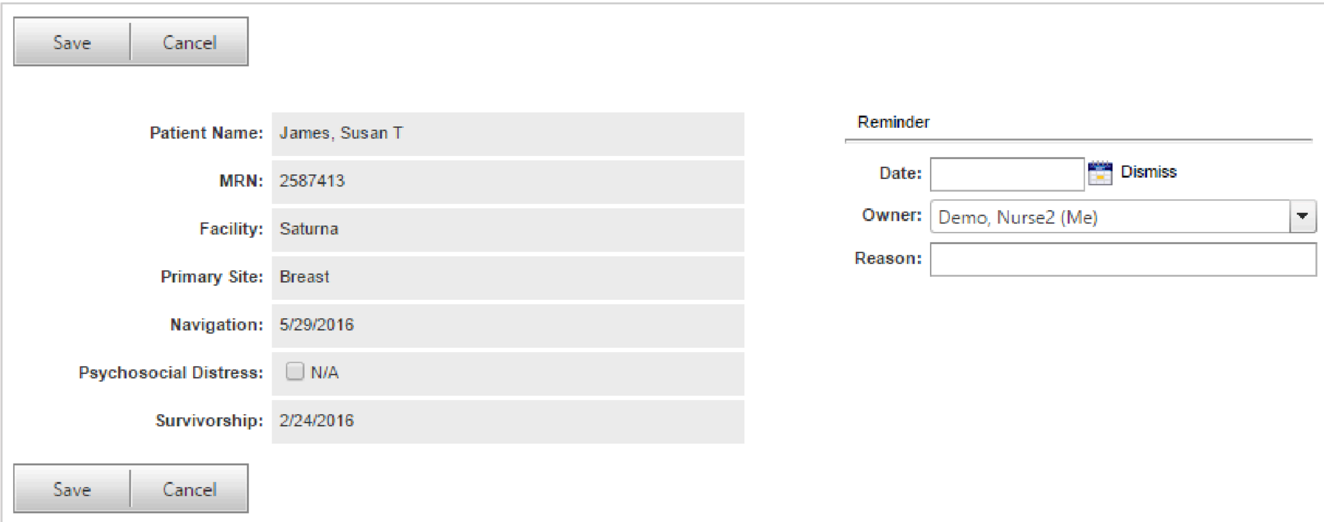
Compliance Worklists display a list of patients that meet the criteria set in worklist filters, and show compliance measure information for each patient. An EQUICARE Administrator is responsible for setting up the Compliance Worklists you have access to and configuring the default filters.

Compliance Worklists can be accessed within the *Worklists* menu by clicking the worklist name.



For each compliance measure in the list, and empty field means the measure has not been met. A compliance measure that has been met will have information in the field, which is usually the date the measure was completed. If a field displays *N/A*, it means that this particular measure has been configured to be not required for this patient. Hovering over the N/A will display the reason it is not required.

The compliance details for a patient, including the options to enable or disable the N/A settings, can be opened by clicking the **Manage** link to the right of the patient name.



Note: When an N/A option is enabled, a field will appear where you must enter the reason that the compliance measure is not required. Also, if the N/A option is enabled and then the associated compliance measure is completed, the N/A will be automatically disabled and replaced with an indicator that the measure was completed.

Hide/Show Filters

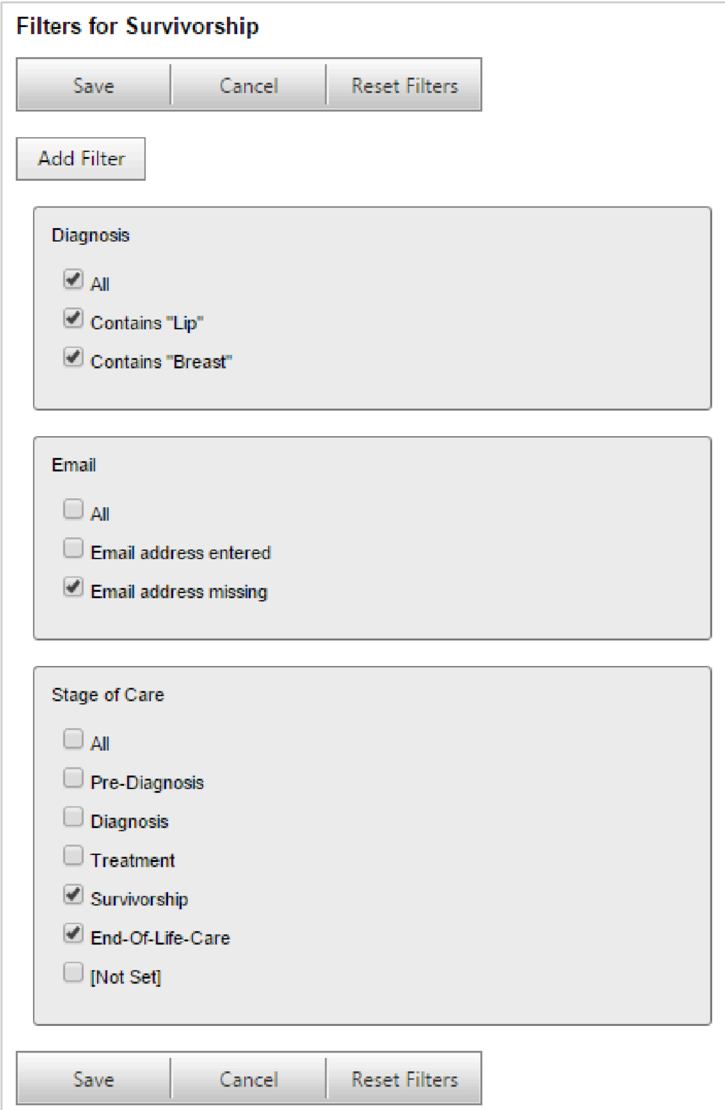
By default, the filters currently in use will be shown at the top of the worklist. To hide the list, click **Hide Filters**.

The current filters can be seen again by clicking **Show Filters**.

Refining a Worklist

To change the filters used to generate the worklist, click **Manage Filters**.

The Filters page shows all of the criteria that can be used to populate the list of patients in the worklist.



> **Tip:** The filter option [Not Set] can be used to include patients in the worklist that have no value set in their record for that filter type.

Setting Worklist Filters

All of the enabled filters combine to determine which patient records will appear in the worklist. By enabling, disabling, and changing the values of filters, you can change which patients are included in the worklist.

> **Note:** Both the list of available filters and the values allowed for each filter can vary from worklist to worklist. Filters are defined by the EQUICARE Administrator for each worklist**.**

The following filter types are possible:

- **Appointment Type:** Select one or more Appointment Types that fall within a selected Date Range**.**
- **Date Added:** Choose a Date Range to filter patients based on when they were added to Equicare.
- **Date Activated:** Choose a Date Range to filter patients based on when they were activated in Equicare.
- **Diagnosis:** Select one or more of the predefined Diagnosis values. Selecting more than one option will include patients in the worklist that match *any* of the selected diagnoses.

- **Email:** Select one or more Email values from: *All*, *Email address missing*, or *Email address entered*. A patient that does not have a Primary email or Notification email is considered to be missing an email address.
- **Facility:** Select one or more of the available Facilities. A patient must be associated with a single facility.
- **Primary Site:** Select one or more Primary Site values. The Primary Site is set for each patient in the Care Management screen. Although it is based on diagnosis, it is not set automatically.
- **Source System:** Select one or more Source System. The Source System for each patient is automatically set when data for that patient is extracted from one or more external systems. If there is more than one source for a patient, this filter uses the source that currently has ownership (i.e. control) of the patient data.
- **Stage of Care:** Select one or more Stage of Care values. These values are set for each patient within the Care Management screen.
- **Status:** Select one or more Status values from *Active*, *Inactive*, *Pending.* A patient can have only one status.
- **Custom Patient Field Filter:** include only the patients with a Custom Patient field set to the value(s) specified in the filter.
- **Email Filter:** include only the patients that have an email address, do not have an email address, or both.

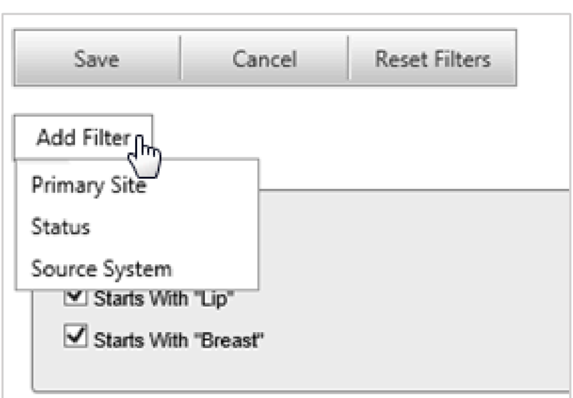
Filter Rules

When using more than one filter or filter value at a time, it is important to understand how they combine to determine the patients that appear in the worklist. There are two simple rules to remember:

- When using more than one value within a single filter type (e.g. selecting more than one Diagnosis option), the filter values will be combined using a logical **OR**. This means that a patient will be included in the worklist if they match *any* of the selected options.
- When using more than one filter type (e.g. selecting a Diagnosis of *Prostate* and also setting Date Added to *Past 4 weeks*), the filters will be combined using a logical **AND**. This means that a patient will be included in the worklist only if they match *both* the Diagnosis filter *and* the Date Added filter (e.g. patients with a diagnosis of Prostate that were added to EQUICARE in the last 4 weeks).

Adding Filters to a Worklist

If a filter is not currently being used it will not appear on the *Manage Filters* screen. If it has been allowed by the EQUICARE Administrator, a filter can be added by clicking the **Add Filter** button and then clicking the filter type.

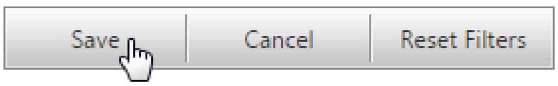


> ***Note:*** *The Add Filters drop-down list will only include filters that have been allowed by the administrator and have not already been added to the worklist. If the Add Filter button does not provide any options when clicked, there are no additional filters that can be added to the worklist.*

Filters added to the worklist using the above steps can also be removed from the worklist by clicking the **Remove** link at the top right of the filter box. Filters that were included in the worklist by default can only be removed by an EQUICARE Administrator.

Saving Filters

Once the desired filters have been added and their values selected, click the **Save** button. At least one value must be selected for each filter to save the new filters settings.



After clicking Save, the worklist will be displayed and the included patients will match the new filter settings. Clicking **Cancel** will not save any changes, and the worklist will be displayed using the previous filter settings.

Once saved, your filter settings for each worklist will be remembered and will be applied each time the worklist is viewed.

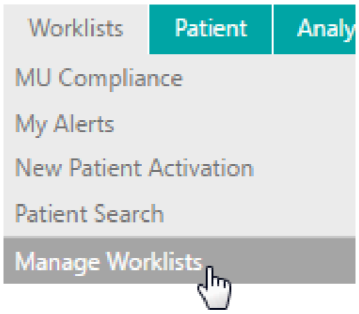
> **Note:** If an EQUICARE Administrator makes changes to the worklist template, all saved worklist filters are replaced by the updated worklist template settings.

Resetting Filters to Default

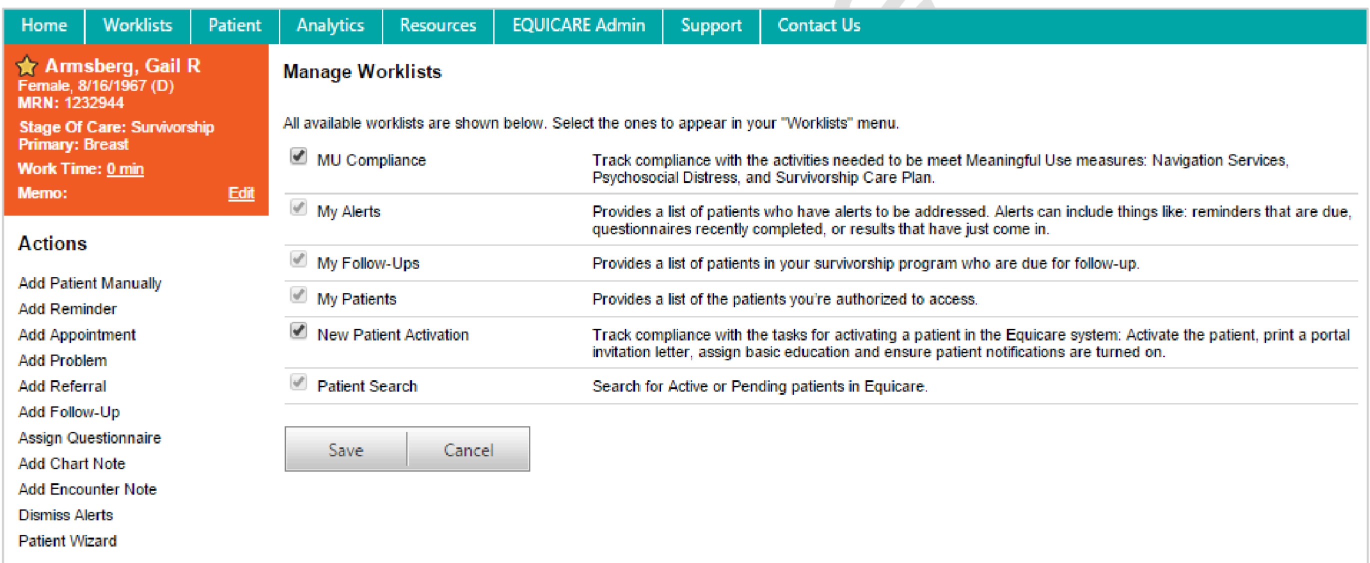
Clicking the **Reset Filters** button resets all filters to their default state, which were defined in the worklist template by the EQUICARE Administrator. This will remove any changes made to the filters. Click **Save** to apply the changes.

Manage Worklists

Many of the worklists available in EQUICARE can be configured to appear or be hidden in the Worklists menu. Go to the *Worklists* menu and click **Manage Worklists**.



Each available worklist has a checkbox next to it. If the box is checked, the worklist will be available in the Worklists menu. If the box is greyed out, the worklist is a default and cannot be toggled on/off.



Click **Save** to save any changes.

Bulk Patient Notifications

Called simply "Patient Notifications" in the menu, this feature allows you to send a notification message (via email, SMS, or both) to a group of patients based on their upcoming appointments. Note that to be able to send a notification to a patient, that patient must have appointment notifications enabled in their account (i.e. they must have opted in to receive either email or sms notifications). This feature is disabled in the system by default.

Administrator: Enabling Patient Notifications in the system

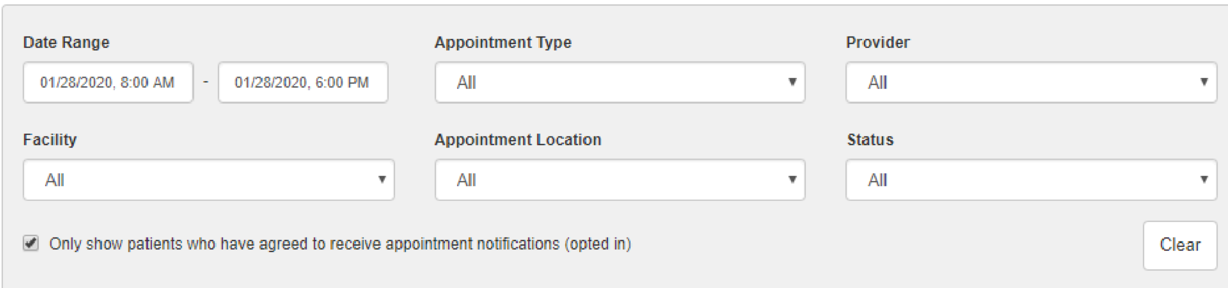
1. Log in as an Administrator.
2. Go to **EQUICARE Admin** > **Configure Communication Settings**.
3. Click the *Patient Notifications* tab.
4. Within the *Patient Notifications Worklist* area, place a check in the box next to *Enable.*

5. Click **Save**.

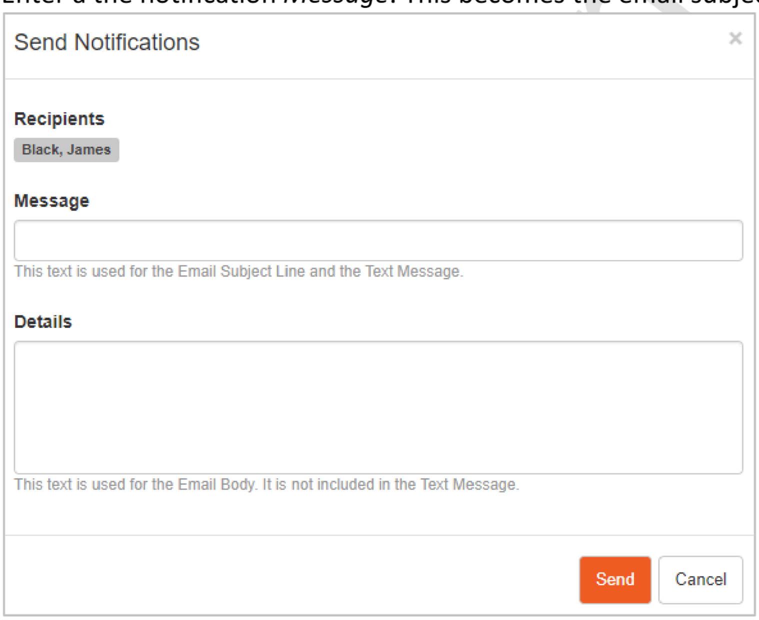
Sending a Patient Notification

On the Send Notification page, search for patients based on their appointment dates, select them, and then compose and send the message.

1. In the *Date Range* fields, specify the date range in which to search for patient appointments. The list will update immediately after selecting a date range.



2. (Optional) Use the filter options to narrow the search results. Filters are: *Appointment Type*, *Provider*, *Facility*, *Appointment Location*, *Status*, and an option to only show patients who have agreed to receive appointment notifications.
3. Select the patients in the list that should be sent the notification.
4. Click **Compose Notification**
5. Enter a the notification *Message*. This becomes the email subject line and the content of the text message.



6. Enter the message *Details*. This becomes the body of the email notification.
7. Click **Save**

Note: It may take a few minutes for all of the notifications to be sent to the recipients. The status of each notification can be seen in the Notification History.

Notification History

The *Notification History* shows a record of all Patient Notifications that have been sent, and the status the notification intended for each patient.

To view a sent Patient Notification:

1. Click the **Notification History** tab.
2. In the dropdown list, select the notification you'd like to view.
3. A list of all patients included in the selected notification will be displayed in the list, along with the status of the notification sent via text message and/or email.

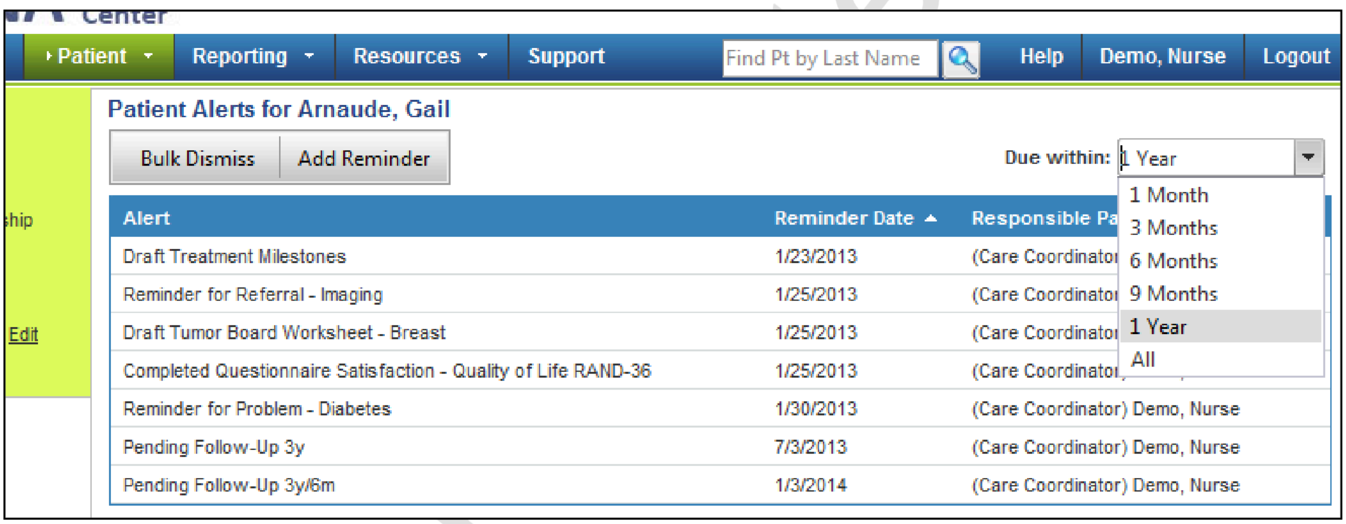
Lesson 3: Patient Related Activities

The Patient menu is where most activity takes place in EQUICARE. This section of the workbook addresses the functionality within each component of the Patient menu.

Important information about the Patient menu
- You must first select a patient (have a patient identified in Current Patient window) to access items in the Patient menu.
- If you have not selected a patient you will get an error message. Error messages are displayed immediately below the horizontal navigation menu.
- To select a patient, go to a worklist, access a recent patient or search for a patient.

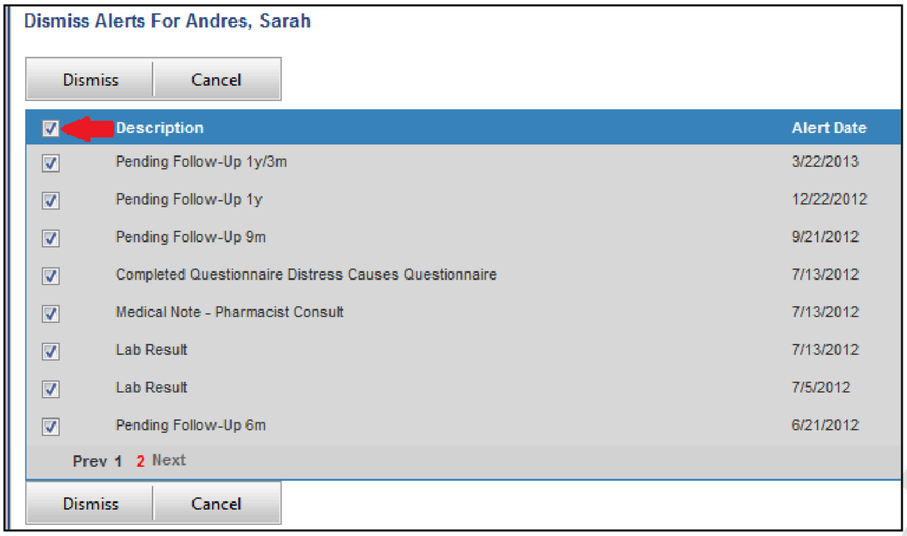
Patient Alerts

The Patient Alerts page will show all the alerts and reminders associated with a single patient. The Alerts shown can be filtered using the 'Due within' filter options.



Each individual item on the Patient Alerts list can be clicked to view it. Alerts such as Medical Notes, Test Results, Treatment Summary and Questionnaires will be dismissed once opened. Other items such as Pending follow-ups, draft Chart items and reminders (from the Action List or general reminders) must be explicitly completed or dismissed to remove them from the Patient Alerts screen.

To dismiss many Alerts at once, the user can click on the Bulk Dismiss button in the Patient Alert screen. This will open a new window which allows the user to dismiss many or all alerts by checking boxes for dismissal. Clicking the top check box (arrowed, below) will highlight all alerts for dismissal. Checking individual checkboxes will remove only the few selected when the Dismiss button is clicked.



Registration

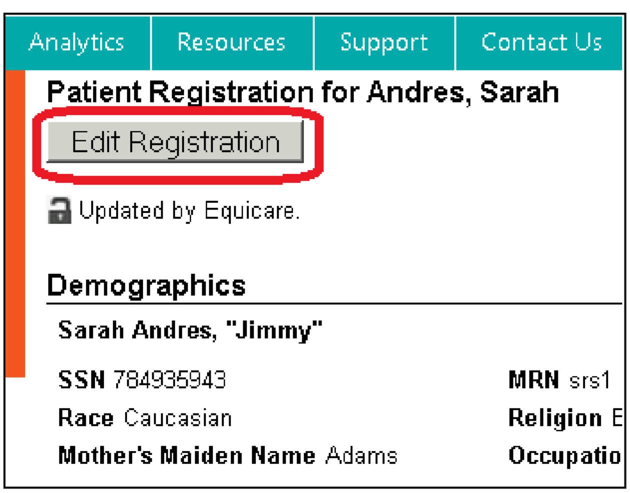
The Registration page displays any demographic information on the patient that was received from the sending application or manually entered into EQUICARE. The detail provided on the Patient Registration screen will depend upon the information that has been configured to be delivered automatically or has been entered manually into EQUICARE.

Patient Registration Summary

All patient details will be displayed on the main Registration page in a summary format, showing only the fields that have information in them. This includes the Demographics, Communication Information, Address, and Other information. To change this information, a user can click the 'Edit Registration' button. Patient Record Ownership should be considered when editing patient information.

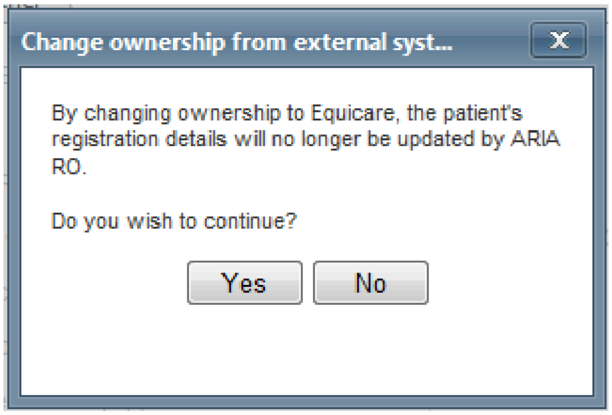
Patient Record Ownership

Patient records can be updated by an external system if the record is owned by an external system. This is indicated by the lock icon.



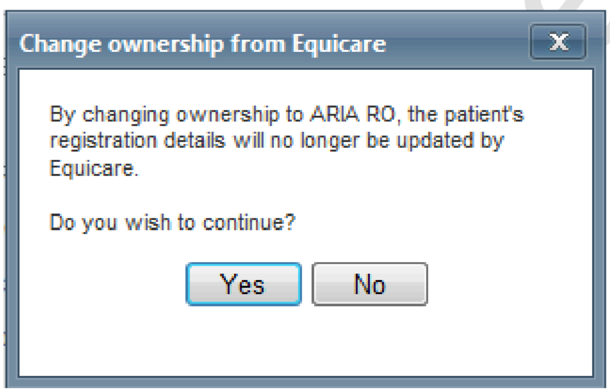
Patient registration details and ownership of the record can be changed by clicking the ‘Edit Registration’ button. Clicking the ‘Edit Registration’ button leads to the Patient Registration details screen.

If the patient record is owned by an external system, the fields will be greyed out and not accessible. In order to change or add information, the user must change ownership of the document by clicking on the lock icon . When the patient record is owned by an external system, hovering over the lock icon will display a message that says “Click to change owner to Equicare”. Clicking on the lock icon will cause the following message to be displayed:



In this case, selecting ‘Yes’ will result in Equicare becoming the owner of the record. ARIA RO will no longer be the owner and will no longer update the patient record. Once the record is owned by Equicare all the fields in all the tabs can be edited.

In the case where the patient record is owned by Equicare and the user wants to revert ownership back to ARIA RO so that the record could be updated automatically again, the user can click on the lock icon. This will cause the ownership to revert back to the original sending system, in this case ARIA RO.



Patient Registration Details

Demographics tab

All demographics can be entered here. Race and Ethnicity fields are on this tab. Note that race refers to a person’s physical attributes while ethnicity refers to a person’s cultural factors such as nationality, culture, ancestry and language.

Communication tab

Methods of contacting the patient are listed here, including a preferred communication method and an indicator for “OK to Leave Msg”.

Address tab
Address information is here.

Other tab
This tab allows the user to enter information related to the patients insurance, advance directives and clinical trials.

Information Available on Patient Portal

It should be noted that all the information on the registration page is visible from the patient portal, except the deceased information and the contact private notes.

Personal Contacts

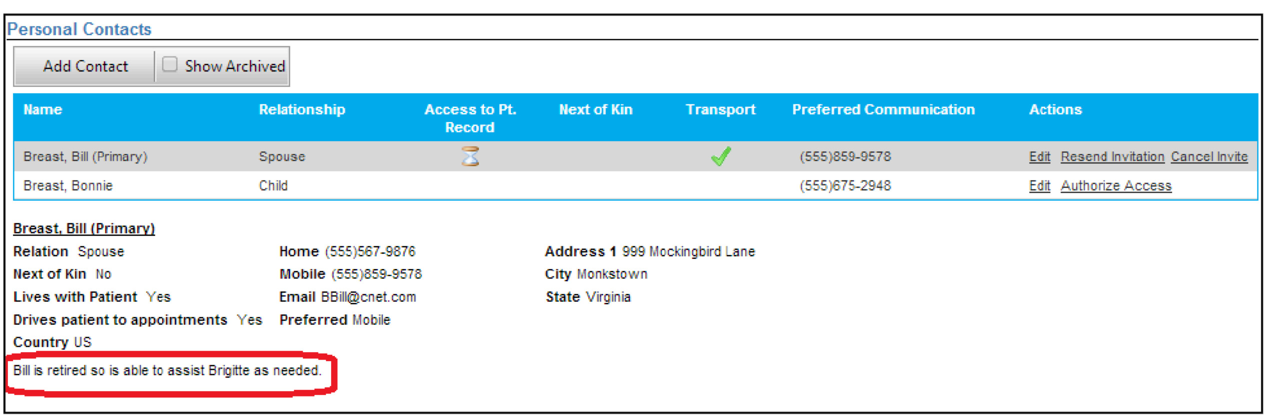
Personal contacts of the patient are displayed at the bottom of the registration page. Personal Contacts are the method for granting access to the patient portal account for family or friends. Personal Contacts with access to a patient's portal account and health information are referred to as 'Authorized Representatives'.

Personal Contacts can be created by the Care Provider on the care provider portal or by the patient on the patient portal. Personal Contacts created by a care provider will be available to the patient and vice versa. To create a Personal Contact as a care provider, on the Registration page, click the 'Add Contact' button.

Provide details for the contact. When adding a first active contact, the "Primary Contact" checkbox will be automatically selected. Only one "Primary Contact" is allowed. Switch the "Primary Contact" if needed by selecting the "Primary Contact" on another contact.

When the "Lives with Patient" checkbox is selected, the Home phone number and Address fields are automatically filled in with the patient's information. The private note field will not be seen in the patient portal.

Once the contact is saved, the contact information will be presented at the bottom of the registration page. If one of the contacts is selected, the contact details will be displayed below the contacts. The private note is also displayed (red circle below).



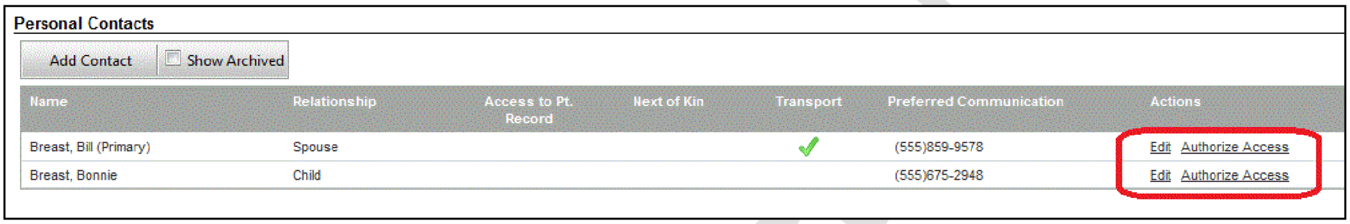
Information Available on Patient Portal

It should be noted that all the information on the registration page is visible from the patient portal, except the deceased information and the Personal Contact private notes.

Authorize a Contact to Access a Patient Account

A Personal Contact can be given access to a patient's portal account. There are 2 ways to grant access to a contact.

1) In the listing of Personal Contacts, the care provider can choose Authorize Access from the Actions column.
2) In the listing of Personal Contacts, the care provider can choose Edit. Within the personal contacts details, there is checkbox 'Authorize to access patient's record'.



Selecting either option starts the process to notify the personal contact and get them to create their personal user name and password.

A care provider needs to know the personal contacts e-mail address as sending an e-mail is part of the sign-up process. The care provider will also need to give the personal contact a system-generated PIN number that is part of the verification process for granting access to the patient's portal account. The PIN number should NOT be sent to the same e-mail address in the system. It is recommended that the PIN be printed and given to the patient so that they may give it to the personal contact.

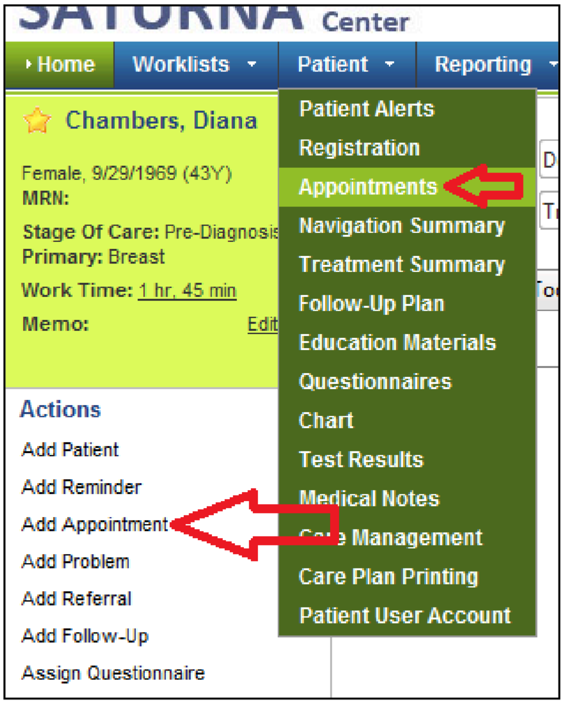
Note: Hospital policies should always be adhered to when granting access to personal health information.

Appointments

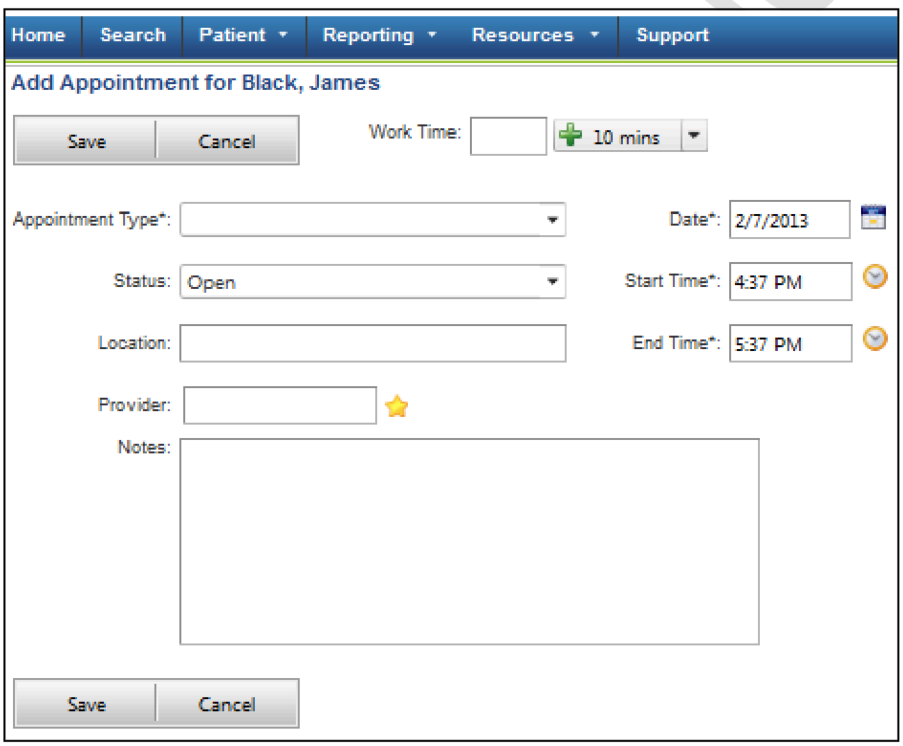
Appointments in OIS can be delivered to EQUICARE. The types of appointments received can be configured in the interface to the OIS.

Appointments received from the OIS cannot be modified in EQUICARE. Any changes must take place in the OIS. These changes will then be delivered to EQUICARE.

Appointments can be added independent of the OIS through EQUICARE. This can be done in the Patient > Appointments screen or by clicking Add Appointment in the Actions list.



In the Appointments window, enter the details. The patient will not see the text, if any, added in the note.



The appointment date, type, provider, location and status will be displayed on the patient portal for the patient.

Treatment Summary

The patient Treatment Summary presents the oncology diagnosis and treatment information that has been delivered to EQUICARE through the interfaces or manually entered into the patient's treatment summary.

Important information about Treatment Summary!

- Select any record in the Treatment Summary to view the full record details or edit records
- The diagnosis treatment summary item can be published to the patient from ARIA if this feature is configured. See **Appendix D**.
- Select Add Treatment in the Treatment Summary to add manual records
- Only manually entered records can be edited. Records loaded from the OIS may be copied with the copied record available for editing. The original record can be archived and can be viewed by clicking the Show Archived button.
- The Treatment Summary can be configured to show absence of treatment for treatment modalities that the patient has not received.
- The system can be configured to automatically publish Treatment items to the Patient Portal.

The information provided on the Summary screen is a summary of the details of each treatment.

To access the detailed view on an item, click on a treatment item. The details screen will open. Click Return to be lead back to the Treatment Summary screen.

The Treatment Summary screen will also give you a visual cue regarding publishing of items to the patient portal:

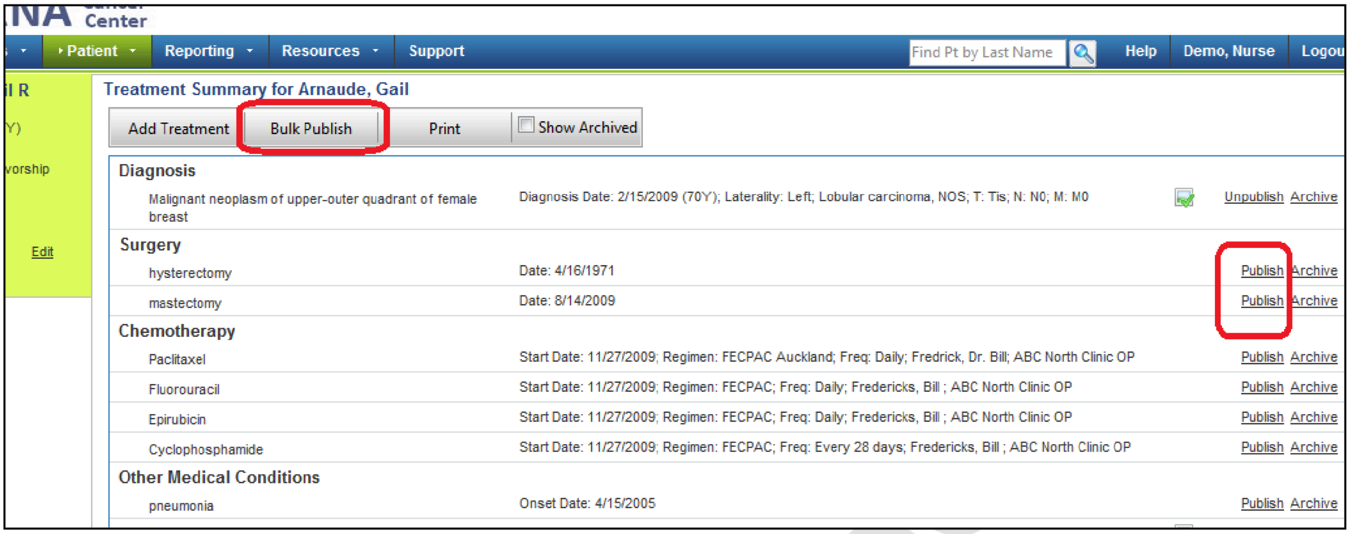
- Items with a icon have been published but not yet viewed by the patient.
- Items with a icon have been published and viewed by the patient.

Publishing a Treatment Record manually to the Patient Portal

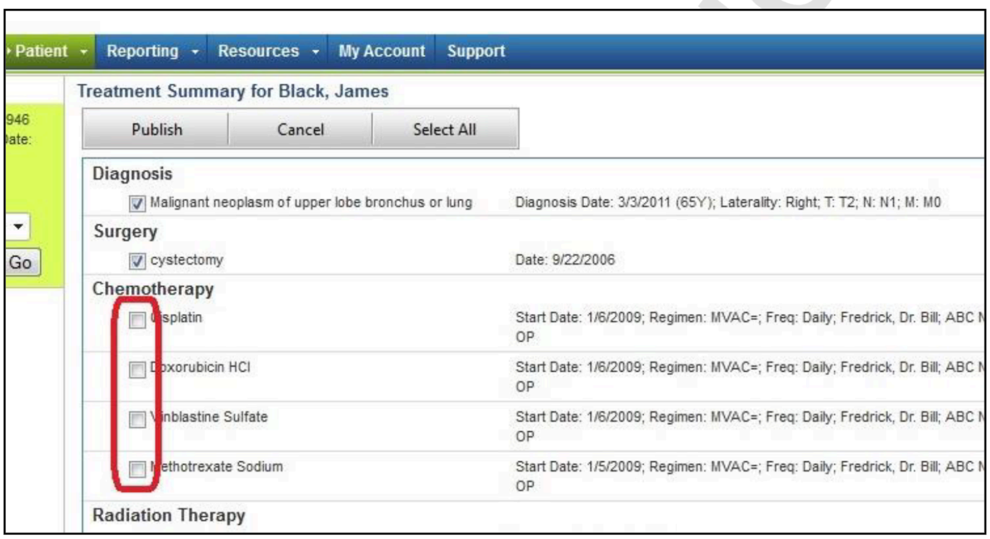
A treatment summary item can be manually published to the patient portal through two methods:

1. Using the Publish option on the right hand side of the item. This would be more appropriate when only one or two items need to be published. The item will be published and the icon will appear.

2. Using the Bulk Publish button near the top of the page. This would be used if there were many items to publish.



To publish multiple items, clicking the Bulk Publish button will open a new window. All items have a check box available at beginning of the line. Check the boxes of the treatment summary items that you wish to publish and click the Publish button.



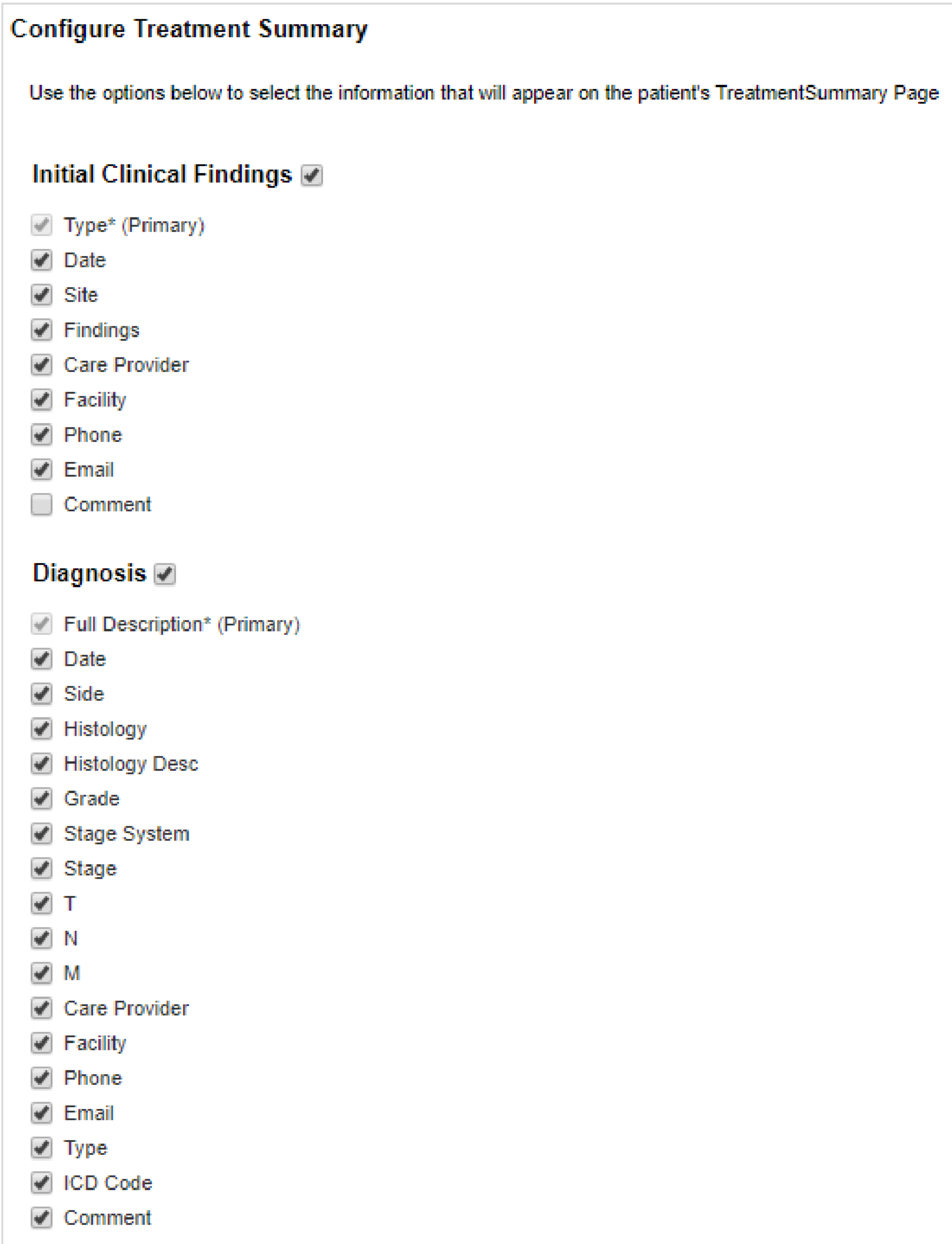
The Treatment Summary screen will show the publish icon for each item selected.

The same workflow will allow 'unpublishing' of items. If for some reason, the user wishes to remove items from the patient portal, the same two methods can be used. With the Bulk Publish, the user unchecks the boxes they wish to remove from the portal and clicks the Publish button. The Treatment Summary will show the items without the publish icon.

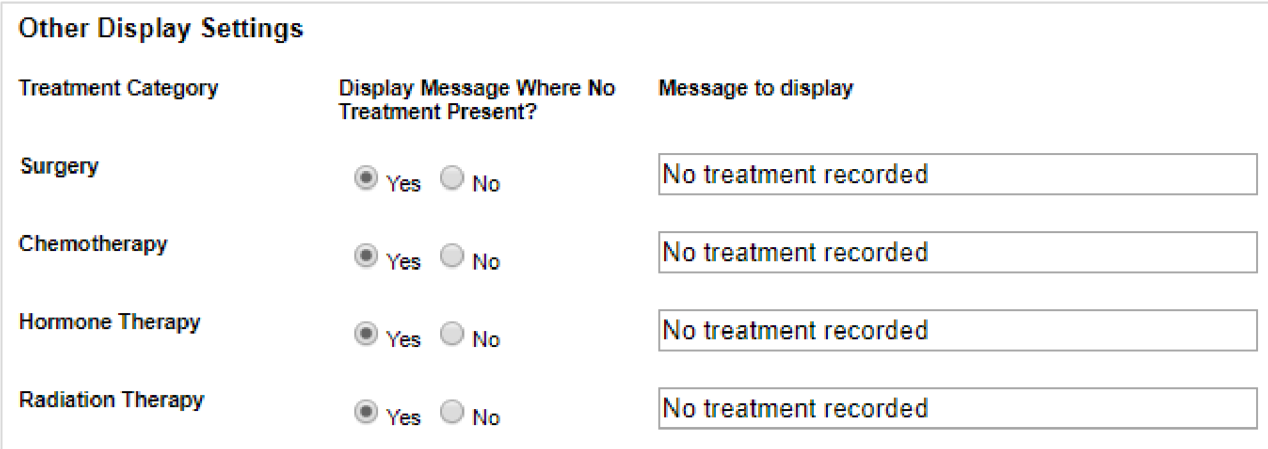
Configuring the Treatment Summary for Patients

You can configure the Treatment Summary page that patients see to show or hide each category and each data type within a category. You can also configure it to show absence of treatment for treatment modalities that the patient has not received.

This is configured by an EQUICARE Administrator by going to the *EQUICARE Admin* menu and clicking **Configure Treatment Summary**.



When the system is configured to show absence of treatment, a standard message such as "No Treatment Recorded" (which can be edited on this page) is shown if the Surgery, Chemotherapy, Hormone Therapy, or Radiation Therapy categories do not have a treatment record.



Archive a Treatment Record from Treatment Summary

To remove a record from displaying in the treatment summary, select Archive from the right-hand side of the record. The item will be archived.

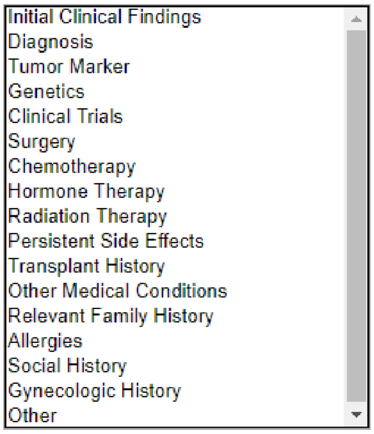
To see the archived items, check the Show Archived button. Any archived items will show with a strikethrough line (ex. ~~Radiation Therapy~~). The option at the left-hand side of the record will now be Unarchive. Select Unarchive to make the record active again.

When all items in certain treatment summary items (Surgery, Chemotherapy, Hormone Therapy, and Radiation Therapy) are archived, a message indicating absence of treatment (such as *No Treatment Recorded*) may be displayed on the patient portal and on the printed care plan. This message is displayed if the system is configured to show absence of treatment.

Add a Treatment Record to Treatment Summary

To manually add a Treatment Summary record:

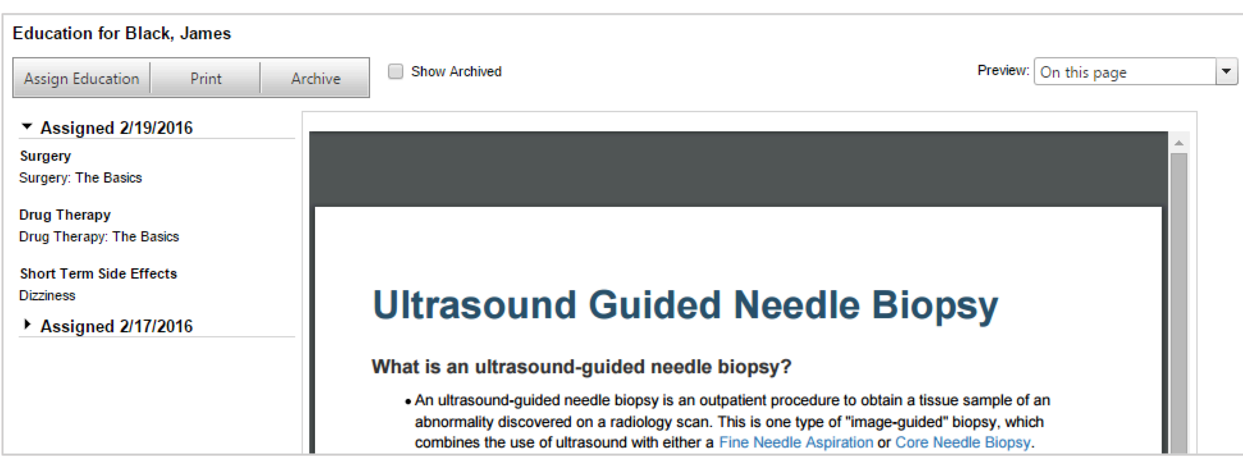
1. Select **Add Treatment** from the Treatment Summary panel.
2. Select the appropriate record category (e.g. Diagnosis, Surgery, etc).



3. Clicking on one of the Treatment Category's will open a data entry sheet which has been configured to include all relevant fields. Treatment Summary data sheets can be modified by an Equicare Administrator in EQUICARE Admin > Configure Look-up Values (see **Section 2: Equicare Administrator Training>Lesson 2**). Click on the dropdown arrow to access the values or enter text in the boxes. Click Save to complete the record.
4. Continue entering records as appropriate.
5. Manually entered records can be edited by opening selecting the record and then selecting Edit from the header.

Education Library

You can view the education materials assigned to a patient by going to the *Patient* menu and clicking **Education**. Education can be assigned from this page or assigned during patient activation from within the Patient Activation Wizard. Education materials assigned to a patient can be included in the patient's Care Plan and will be accessible in their Patient Portal account.



Articles assigned to a patient are grouped into reading lists based on the date the articles were assigned. Within each reading list, articles are further divided by their categories.

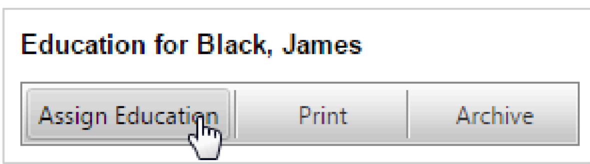
Assigning Education Articles

By default, all articles in the education library are organized first by *Disease Site*, then by the following categories:

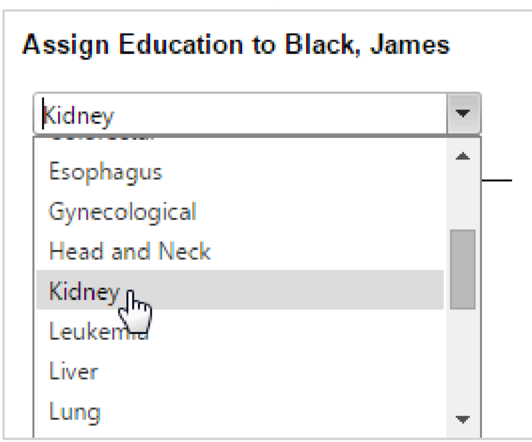
- Introduction
- Diagnosis and Work-up
- Surgery
- Drug Therapy
- Radiation Therapy
- Short Term Side Effects
- Support Resources

In addition to the above categories, there may be one or more custom folders within each Disease Site that each contain a customized selection of articles from the library. Custom folders are created during installation of EQUICARE and/or by an EQUICARE Administrator.

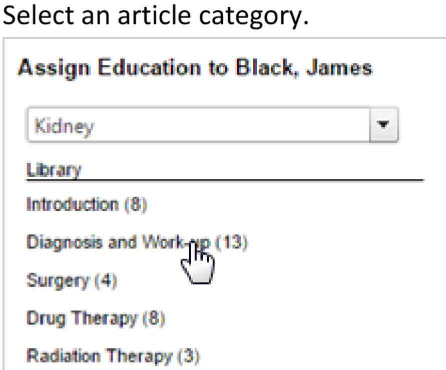
1. With a patient selected, go to the *Patient* menu and click **Education**.
2. Click **Assign Education**.



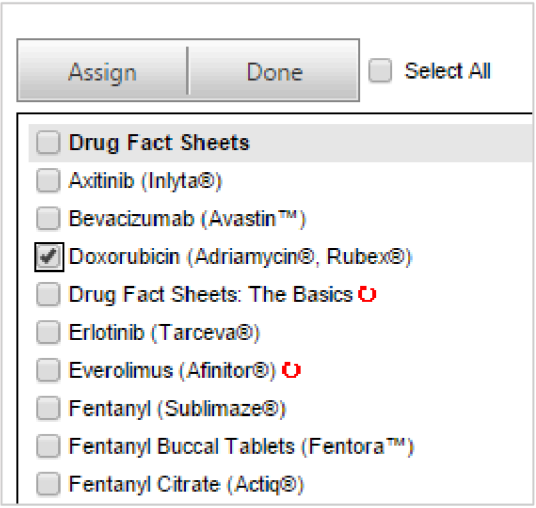
3. The Education Library automatically shows articles related to the primary disease site specified in the patient record (if set). To change the *Disease Site*, click the drop-down list and select the desired site.



4. Select an article category.



5. Place a check in the box next to each article you'd like to assign to the patient, or click the *Select All* box at the top. The contents of each article can be viewed by clicking the title.



6. Click **Assign.** The Articles included in the patient's education materials will be marked with a red circular arrow beside the article name.
7. You can repeat the above steps to assign articles from other categories. When all desired articles are assigned, click **Done**.
8. A reading list of all articles assigned is created with today's date. Any other articles assigned to the patient today will be added to this reading list. If articles are assigned on another date, a new reading list will be created.

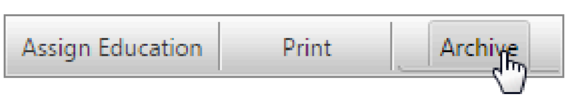
   Tip: If you know the subject or title of an article, you can use the *Search Library* field to quickly locate articles using keywords. Multiple search terms and phrases can be used, separated by a comma. You can then assign the desired articles to the patient from the search results list.

Archiving Articles

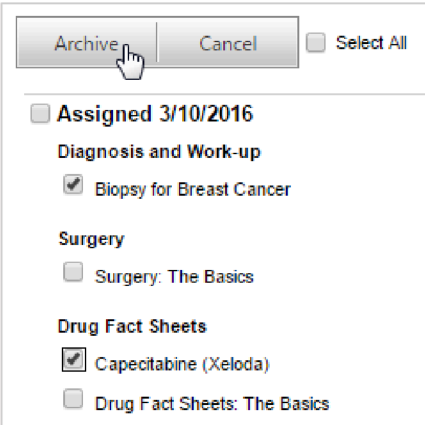
By default, the list of assigned articles will only show active articles. To show archived articles, place a check in the box next to *Show Archived*. Archived articles are not visible to the patient.

Tip: When viewing a list containing both archived and active articles, archived articles are marked with the Archived icon.

To archive an article, click the **Archive** button.



Place a check in the box next to the article(s) you wish to archive, then click **Archive.**

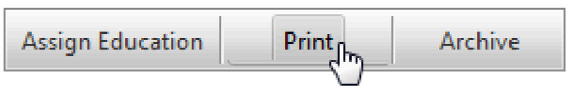


Important: Once an assigned article has been archived, it cannot be made active again. However, the article can be reassigned as part of a new reading list.

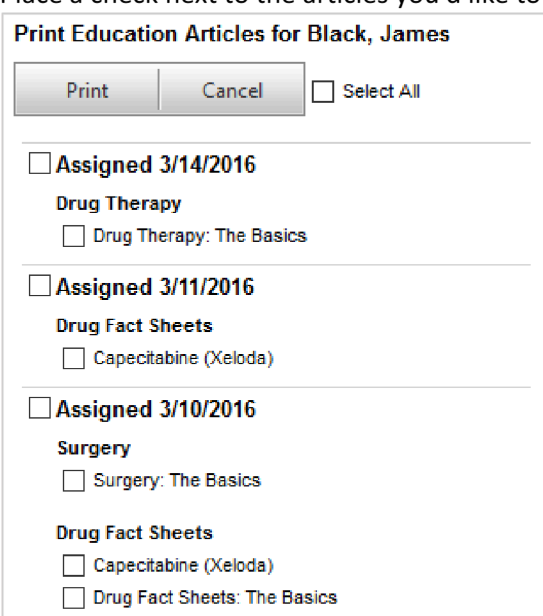
Printing Articles

Assigned articles can be combined and printed as one PDF document. To print articles:

1. Click **Print**.



2. Place a check next to the articles you'd like to print.



3. Click **Print** to generate the combined PDF.
4. Depending on your browser settings, the PDF will either open in a new browser tab or window, or you'll be prompted to save the file. Use your PDF viewer options to print the document.

Patient Questionnaires

Questionnaire templates provided by Equicare or created by an Equicare Administrator can be assigned to patients for completion online through the patient portal or may be completed with the clinician at return visits. There is no limit to the number of questionnaires that can be created within an EQUICARE system. Creating questionnaires is described in **Section 2: Equicare Administrator Training> Lesson 2.**

Only those questionnaires assigned to the patient are accessible from the patient record.

Important information about Questionnaires
- Once completed, questionnaires cannot be modified
- Questionnaires can be assigned one at a time or on a recurring pattern
- Assigned questionnaires may be declined by either the patient or a care team member and can be unassigned by a care team member
- Questionnaires on a recurring pattern which are not completed by a patient before the next occurrence becomes active will have a status of 'Missed'

Questionnaires Summary

The main questionnaires screen provides care providers with a summary of the questionnaires assigned to a patient. The table shown on this page displays any questionnaires that have been assigned, declined or completed for the current patient. On this page, the care provider is able to:

- Assign questionnaires by clicking the 'Assign Questionnaire' button (red section below)
- Start an assigned questionnaire by clicking the Start link (pink section)
- Decline a questionnaire on a patients behalf by clicking the Decline link (pink section)
- Preview a score from a completed questionnaire by clicking on the Result (purple section)
- See the scheduling of the questionnaire (last completed and next due) (green sections)

Questionnaire Listing for Breast, Brigitte

Assign Questionnaire

Title	Last Completed	Result	Next Due	Actions
Functional Assessment of Cancer Therapy - General (FACT-G)	5/2/2014	Physical Well-Being Score (0-28): **17** ; Social/Family Well-Be…	5/27/2014	Start Decline
Sleep Disorders Screening			5/27/2014	Start Decline
Depression Screening			6/9/2014	
Form - History	1/2/2011			
Form - Medications and Allergies	1/2/2011			
NCCN Distress Screening Tool	5/2/2011	Distress Scale Alert: **2** (**Status: Green**);		
Patient Satisfaction	5/2/2011	Treatment Satisfaction (0 - 6): **6** ; Recommendation (0 - 4): **4** ;		

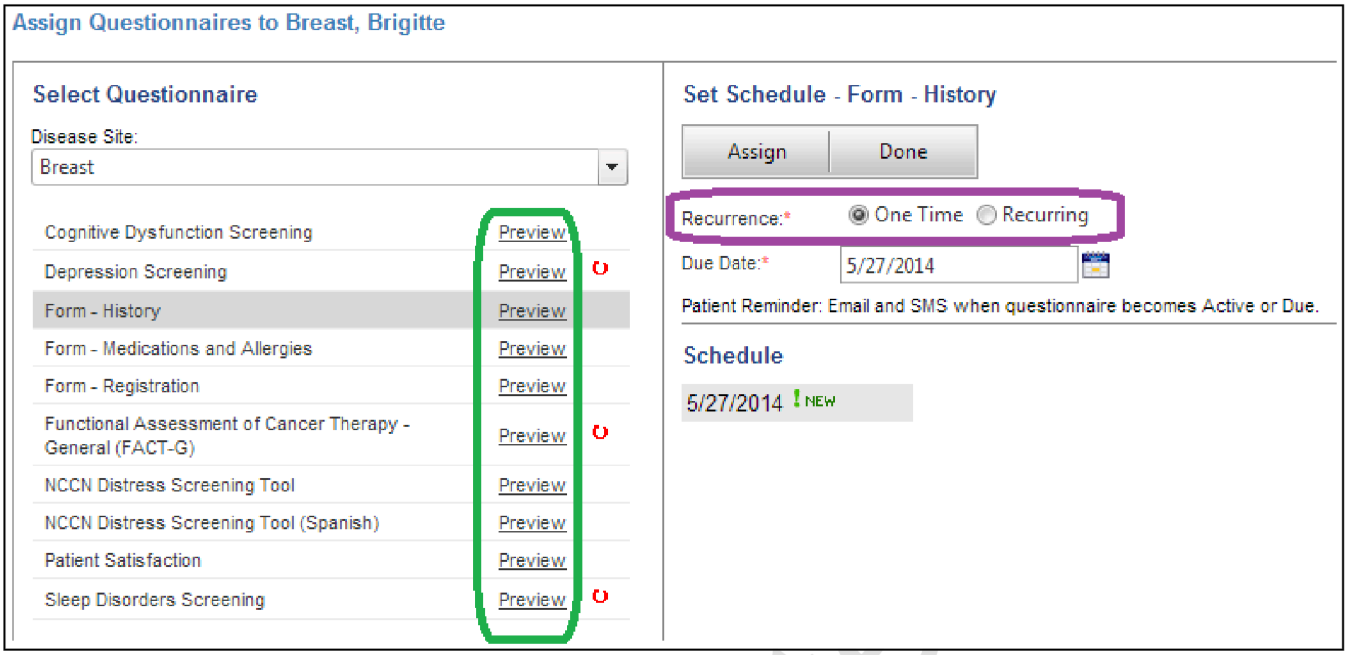
Patient Reminder: Email and SMS when questionnaire becomes Active or Due.

Assign Questionnaires

To assign a questionnaire to the patient, a patient must be selected (in context). With the patient in context, click the "Assign Questionnaire" button above the table. The Assign Questionnaire screen will display.

On this page, the care provider is able to:

- Preview the questions, scoring and messaging associated with a questionnaire template (green section below)
- Assign a questionnaire as a single item or part of a recurring pattern (purple section)



Questionnaires shown by default are based on the patients Primary Disease Site. The Primary Disease Site can be set in the Patient Activation Wizard or the Care Management screen.

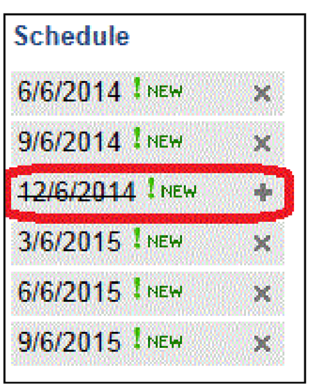
If the questionnaire the care provider wishes to assign is not associated with the specific disease site of the patient, all active questionnaires can be viewed by selecting the 'All' option for the disease site dropdown. This will show questionnaires that are associated with all disease sites.

<u>Scheduling</u>

To assign questionnaires to the patient, select the appropriate questionnaire from the list. Then select the schedule that is needed:

- 'One Time' allows the scheduling of a single date. Change the due date for the questionnaire as appropriate.
- 'Recurring' allows the scheduling of multiple dates either weekly, monthly, every 3 months, every 6 months or every year. The date when the first instance of the questionnaire becomes active can be set in the First Due Date field. The number of instances can be adjusted as appropriate. The schedule of dates is displayed as the schedule and number of recurrences are changed.

To remove a date from the Schedule, click on the 'x' at the end of the date. The date will be shown with strikethrough text.



1. The ‘x’ has now changed into a ‘+’. Click on the ‘+’ to add the date back to the schedule.
2. Click the "Assign" button to save the scheduling.

The questionnaire template will now have a red circle at the end of the row indicating that it has been assigned. Clicking on the template will display the schedule that has been set for the questionnaire.

To assign another questionnaire:

1. Select another questionnaire from the list. Follow the steps above to set the Recurrence pattern.
2. Select "Done" to complete and return to the main questionnaire screen.

Notes about scheduled Questionnaires:
A scheduled questionnaire will become active for the patient two days before the scheduled due date. If the questionnaire is not completed before the end of the scheduled due date, it is marked as overdue and will appear in the My Alerts list of the associated team members. If patient notifications for questionnaires are turned on, the patient will be sent a message when a questionnaire becomes active, and send another message if it becomes overdue.

<u>Preview Questionnaire or Review Completed Questionnaires</u>

To preview or review a questionnaire, click on the questionnaire in the table of the main questionnaire screen. The full detail of the selected questionnaire will display. A questionnaire which has not been completed will list the questions. A questionnaire that has been completed will list the questions, answers given by the patient, history, schedule and any reminders.

There are a number of tabs associated with each questionnaire:

- **Flowsheet tab**: shows multiple completed questionnaires with the questions in the left column and answers given in columns to the right. This allows comparison of answers. The first completed questionnaire is labeled as ‘(baseline)’. The flowsheet view will display the baseline + 4 other completed questionnaires. Date of completion and who completed the questionnaire is indicated at the bottom of the flowsheet.

- **History tab**: provides a view of the history for a questionnaire template. It will show instances of the questionnaire that were complete, missed or declined.

- **Schedule tab**: Shows the future schedule for a questionnaire template. It also allows a care provider to schedule another instance of the questionnaire. To add another instance of the questionnaire to the schedule, click the calendar to pick the date when the new instance of the questionnaire will become active. Click the ‘Add’ button to add the date to the schedule. To remove an instance of the questionnaire, click on the ‘x’ at the end of the date. The date will be shown with strikethrough text. A <u>Clear All</u> option is available here to remove all the dates in the schedule. Click Save to complete any changes to the schedule. Click the ‘Discard Changes’ button to not save any changes made. A recurring pattern of questionnaires cannot be completed automatically in the schedule tab. To add a recurring pattern, go to the Assign Questionnaire screen.

- **Reminder tab**: If a patient’s questionnaire results require further follow-up, a reminder can be set up to remind the care provider. This reminder will show in the My Alerts work list for the care provider on the reminder date.

Test Results/Medical Notes

Important information about Test Results and Medical Notes

- This feature is only available to those institutions that have approved the collection and publishing of test results or medical notes to the patient portal.
- Test Results publishing can be controlled from within ARIA or can be controlled using the Equicare filtering controls. Medical Notes publishing can only be controlled with the Equicare filtering controls.
- Auto-Publish will automatically publish specific types of test results and medical notes to the patient portal. Institutions select the test procedures / document types to automatically publish (e.g. “CBC”, “Radiology Note”). Test Results not covered by the auto-publish rules must be explicitly published by the clinician.
- Items that are auto-published with a time delay will be shown as ‘Pending’ and can be stopped from publishing by the user.

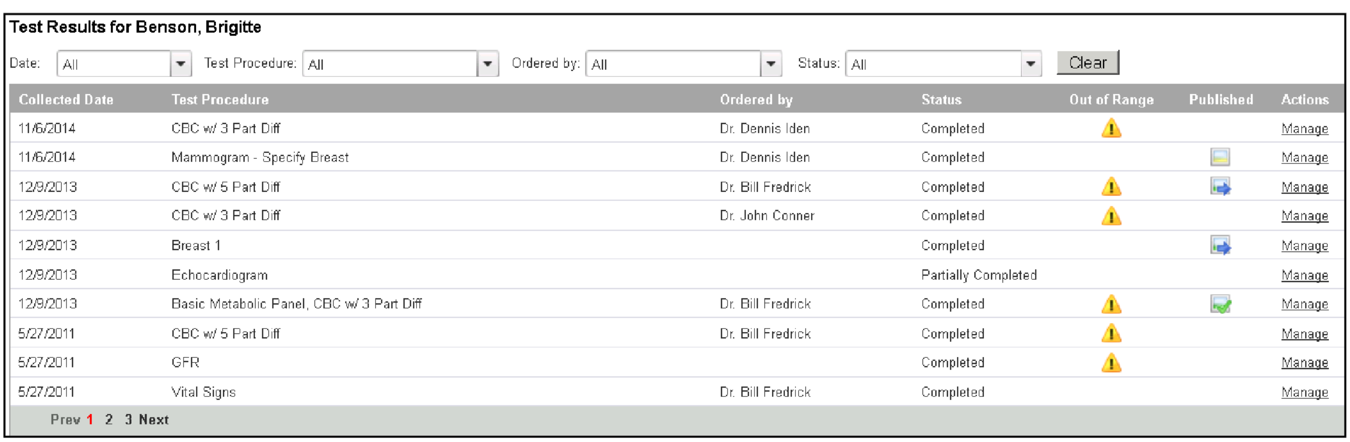
For institutions with an ARIA OIS, test results and medical notes created in or received by ARIA from other systems can be accessed in EQUICARE and published to the patient portal.

Test results and medical notes received by ARIA can be delivered to EQUICARE through the data interface. Clinicians are then able to review results/notes and publish to the patient portal if appropriate. At the time of publishing, clinical users are able to record a patient-facing comment for each result or medical note.

ARIA users are able to publish Test Results from ARIA directly to the patient portal. See **Appendix D** for more details.

Icons for test results:

- : Test results with an abnormal or out of range value in the result.
- : Results that are scheduled to auto-publish at some time in the future.
- : Results that have been published to the patient portal.
- : Results that have been viewed by the patient.
- : Medical Notes that are scheduled to auto-publish at some time in the future.
- : Medical Notes that have been published to the patient portal.
- : Medical Notes that have been viewed by the patient.


Test Results for Benson, Brigitte

Date: All | Test Procedure: All | Ordered by: All | Status: All | Clear

Collected Date	Test Procedure	Ordered by	Status	Out of Range	Published	Actions
11/6/2014	CBC w/ 3 Part Diff	Dr. Dennis Iden	Completed			Manage
11/6/2014	Mammogram - Specify Breast	Dr. Dennis Iden	Completed			Manage
12/9/2013	CBC w/ 5 Part Diff	Dr. Bill Fredrick	Completed			Manage
12/9/2013	CBC w/ 3 Part Diff	Dr. John Conner	Completed			Manage
12/9/2013	Breast 1		Completed			Manage
12/9/2013	Echocardiogram		Partially Completed			Manage
12/9/2013	Basic Metabolic Panel, CBC w/ 3 Part Diff	Dr. Bill Fredrick	Completed			Manage
5/27/2011	CBC w/ 5 Part Diff	Dr. Bill Fredrick	Completed			Manage
5/27/2011	GFR		Completed			Manage
5/27/2011	Vital Signs	Dr. Bill Fredrick	Completed			Manage

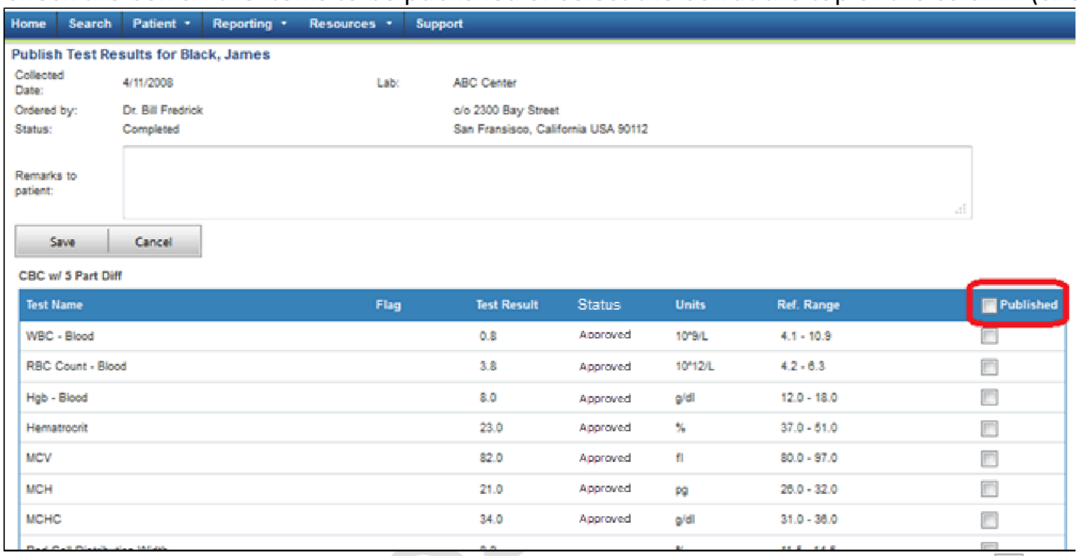
Prev 1 2 3 Next

At any time, published results can be unpublished from the patient portal.

Publish Test Results

To review and publish test results to the patient portal:

1. From the Patient menu, select Test Results
2. The Test Results grid will list all available results. Click Manage on the right end of the line of the test to be published.
3. The test result will be displayed, with the order details entered in the result header.
4. A note space is available to enter relevant remarks to the patient and a “Published” checkbox displayed at the end of each result.
5. Check the box on the items to be published or select the box at the top of the column (circled below).

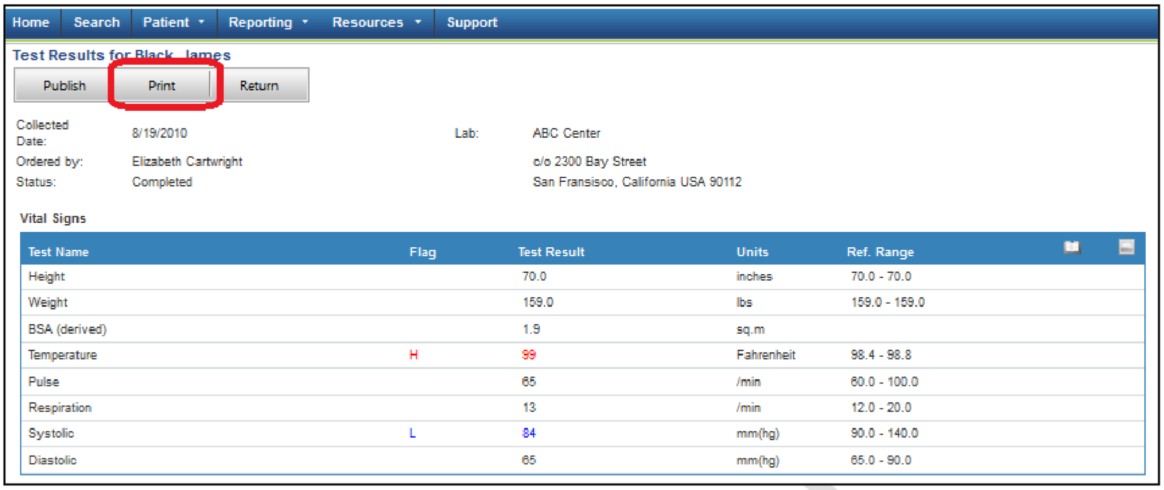


6. Select “Save” to finish. You will be returned to the results grid. The published icon ( ) will be displayed on the line for the published result.

To Print a Test Result

To print a Test Result to give to a patient:

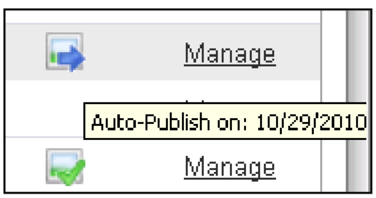
1. From the Patient menu, select Test Results.
2. From Test Results grid, select a result to review and publish. Click on the line of the test result.
3. A window will open with a print button.



A print viewer screen will be displayed. Select print from the browser panel to complete printing. Note that you can also publish from this screen, if necessary, by clicking the Publish button.

Stop Autopublishing of a Test Result

A test result that is scheduled to be published will be indicated by this icon in the Published column. Hover the cursor over the icon to be shown the date in the future on which the test result will be published.



To stop autopublishing, click on the Manage link at the end of the row. This will lead to the detail screen for the test result. A care provider can cancel autopublishing by clicking on the Cancel link.

The autopublish statement is now shown with strikethrough font and the action has now changed to Set. To reverse this action and have the autopublishing continue, click Set. Click the 'Save' button to save changes.

The autopublish icon will now be gone in the Test Results main screen.

A care provider can also modify what items will be autopublished by unchecking the publish box for the test results which they do not want to unpublish. Click the 'Save' button to save changes.

Unpublish a Test Result

To unpublish a test result:

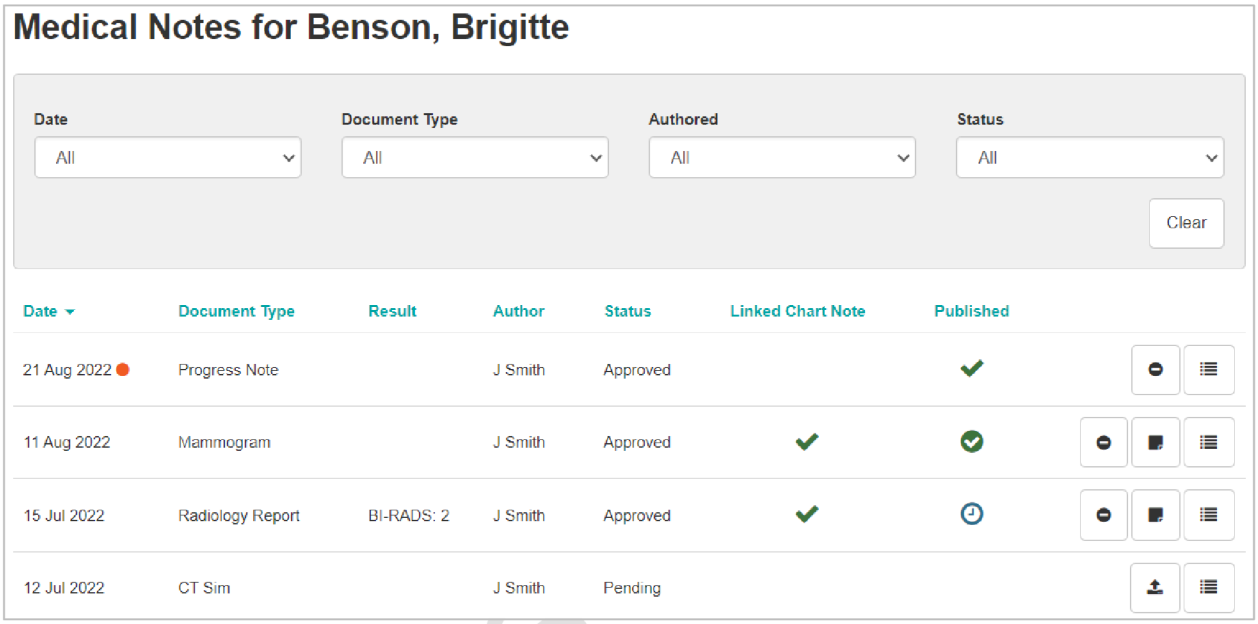
1. Click the "Manage" link on the appropriate result in the results grid to open the publishing screen.
2. Uncheck the checkboxes for those components of the result to be removed from the patient portal. The checkbox at the top of the column can be used to unselect all the results.
3. Select "Save" to finish. The result will no longer be visible to the patient.

Note: if ARIA is being used as the method for publishing test results, a test result that is published and then unpublished in ARIA will become available and then be removed from the patient portal. The unpublish action in ARIA is respected by Equicare.

Publish Medical Notes

To review and publish medical notes to the patient portal:

1. From the Patient menu, select **Medical Notes**.



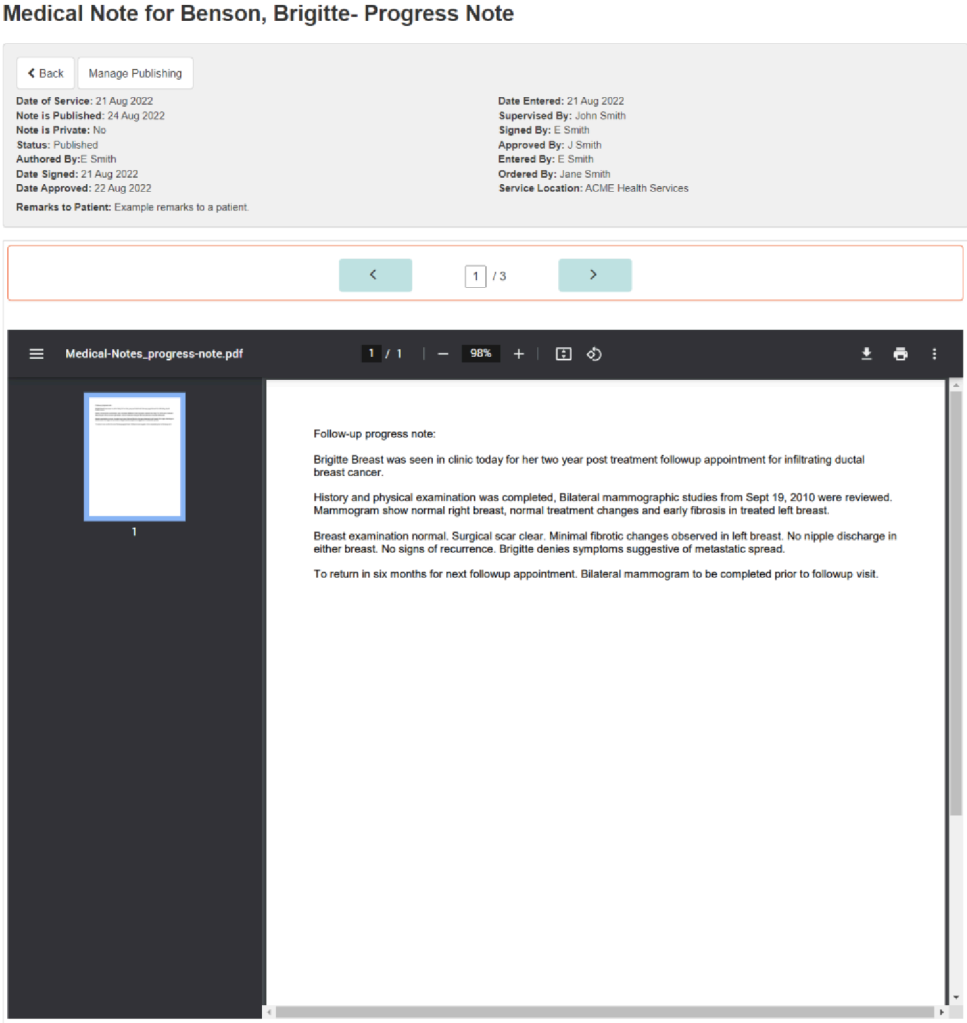
2. Click the **Publish** button for the medical note to be published.
3. The Medical Note will be published to the patient portal and the option to unpublish will appear.
4. To view the details of a medical note, click its **Details** button.

Publish Medical Notes with Remarks to Patient

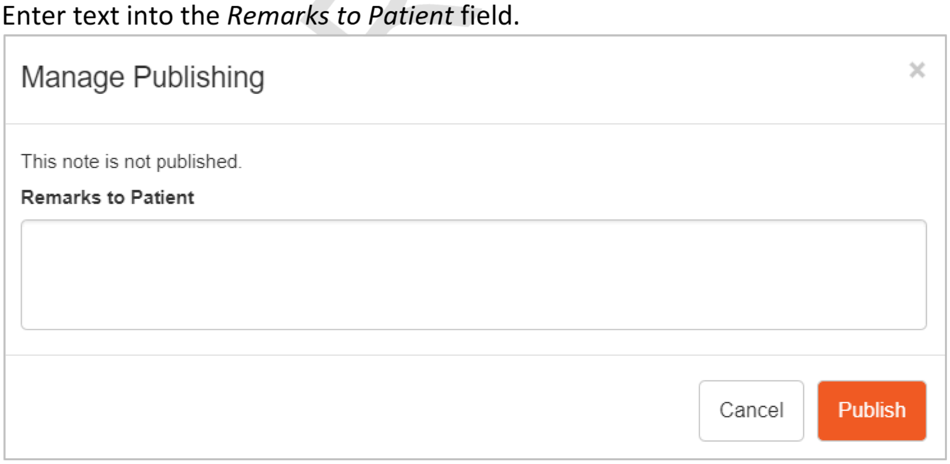
To add comments or information for the patient while publishing a medical note:

1. From the Patient menu, select **Medical Notes**.

2. Click the **Details** button of the note you wish to view.



3. Click the **Manage Publishing** button.
4. Enter text into the *Remarks to Patient* field.



5. Click the **Publish** button to have the remarks and medical note become available on the patient portal. (The patient portal will be flagged as having a NEW! item. The Remarks to Patient will be visible once the patient opens the medical note.)

To Print a Medical Note

To print a Medical Note to give to a patient: when viewing the note details, click the Print icon .

Unpublish Medical Notes

To unpublish a Medical Note, use one of the blow methods:

- Option 1: Click the **Unpublish** button in the list.
- Option 2: Click the **Details** button , click the **Manage Publishing** button, and click the **Unpublish** button.

Autopublishing of Medical Notes

A medical note that is scheduled to be published will have the Autopublish icon . Hovering over the icon will show the date on which the medical note will be published.

The autopublishing of a note can be stopped by unpublishing it.

Manage Patient

The Manage Patient screen allows you to control the following patient related functions:

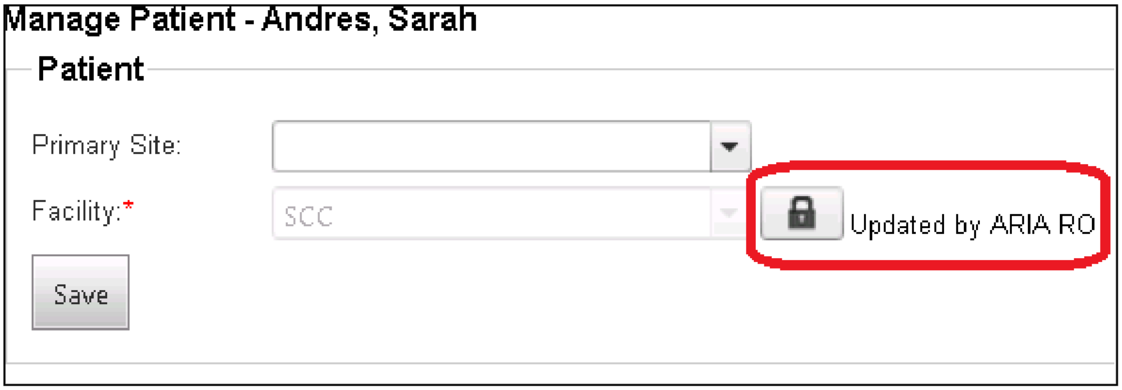
- Set the patient's facility
- invite the patient to the portal
- manage the patient's password and account
- manage reminder settings for the patient
- manage the patient's care team
- set workgroups for the patient.

Facility

The facility set for the patient will determine the branding and content that the patient will see when logging into the patient portal.

The facility for a patient may be set automatically according to business rules for patient's received from an external system. This can be set-up by an Equicare Service technician.

If the Facility ownership is set to an external system, this system will be identified to the left of the facility field (circled below).



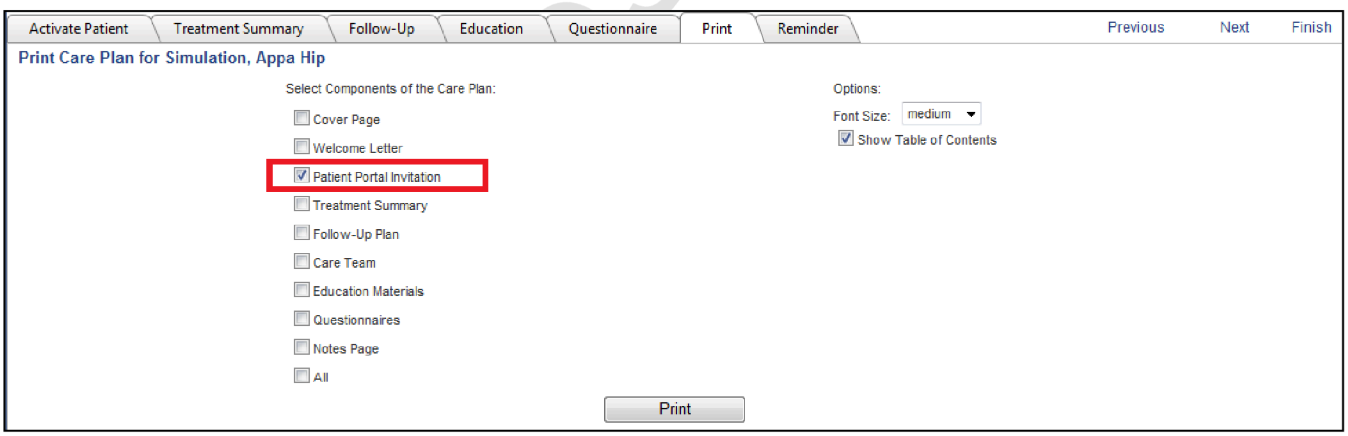
When the facility is set by the external system, the facility cannot be changed. To change the facility, click on the lock icon to change ownership to Equicare. The facility can now be changed.

When the ownership is changed to Equicare, the external system will no longer update the facility. Note that this does not limit the external system from updating other fields such as the Treatment Summary or Registration.

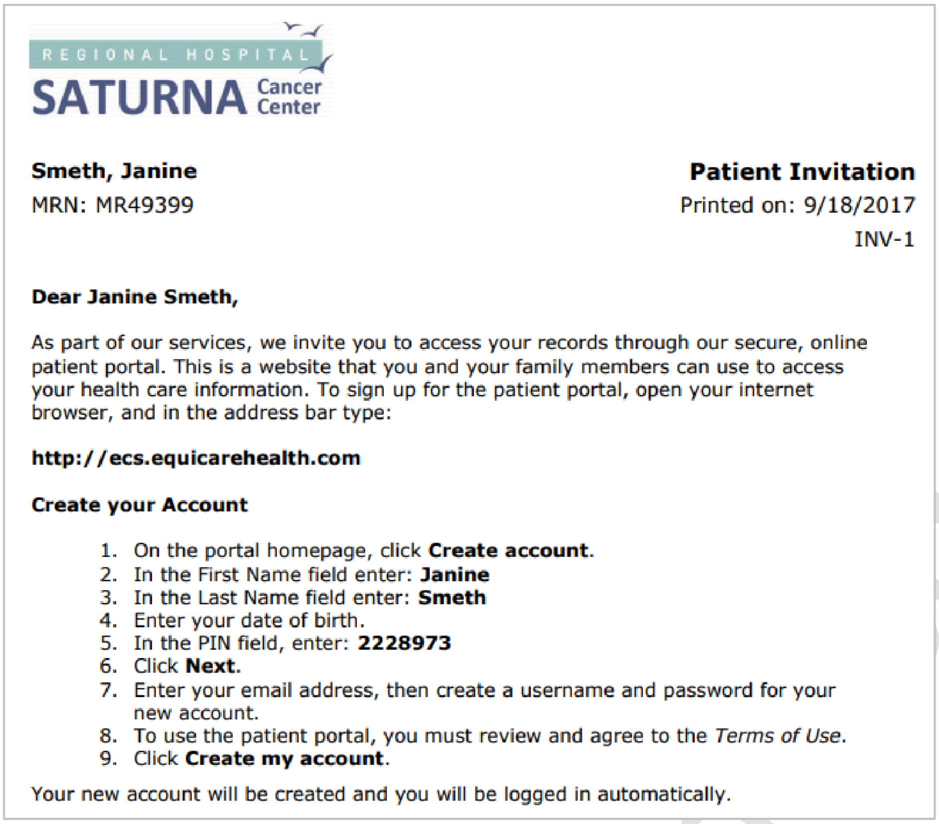
Click the 'Save' button to save any changes.

Inviting a Patient to the Portal

Once a patient is activated in Equicare CS, the patient needs to be given verification information so they are able to access their records through the portal. When activating a patient through the patient activation wizard, an invitation letter for the patient can be printed in the Print tab.



The letter received by the patient can be customized. The letter can be given to the patient at a clinic visit, e-mailed to the patient or fax/mailed to the patient.



REGIONAL HOSPITAL
SATURNA Cancer Center

Smeth, Janine
MRN: MR49399

Patient Invitation
Printed on: 9/18/2017
INV-1

Dear Janine Smeth,

As part of our services, we invite you to access your records through our secure, online patient portal. This is a website that you and your family members can use to access your health care information. To sign up for the patient portal, open your internet browser, and in the address bar type:

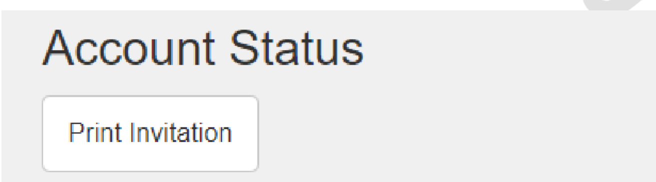
http://ecs.equicarehealth.com

Create your Account

1. On the portal homepage, click **Create account**.
2. In the First Name field enter: **Janine**
3. In the Last Name field enter: **Smeth**
4. Enter your date of birth.
5. In the PIN field, enter: **2228973**
6. Click **Next**.
7. Enter your email address, then create a username and password for your new account.
8. To use the patient portal, you must review and agree to the *Terms of Use*.
9. Click **Create my account**.

Your new account will be created and you will be logged in automatically.

Alternately, a care provider can print an invitation from Patient > Manage User Account. The **Print Invitation** button is available here. Clicking the button will open a new window with the invitation letter which can be saved or printed.

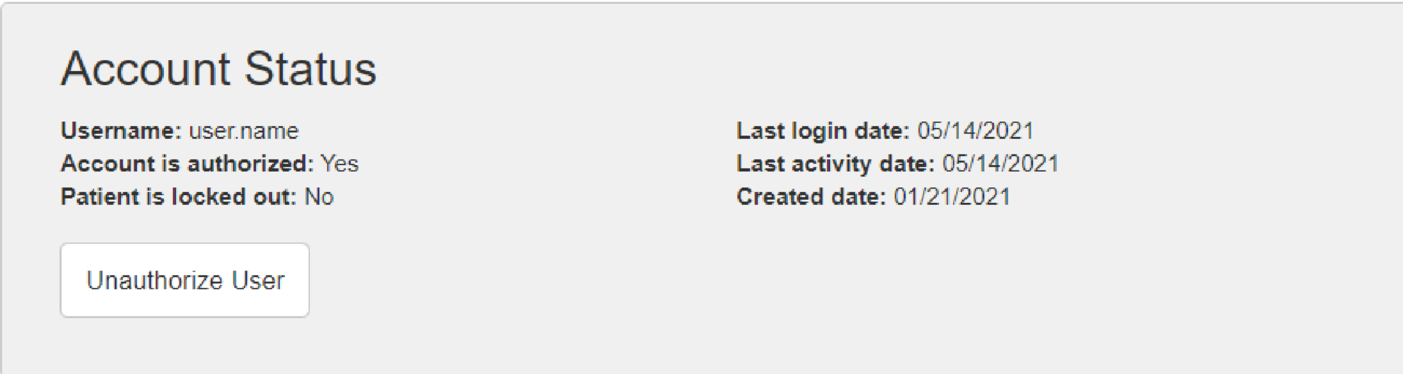


<u>Managing User Accounts</u>

Once a patient has used the invitation letter to sign up for the Patient Portal, other options are available in the Patient > Manage User Account area.

Account Status

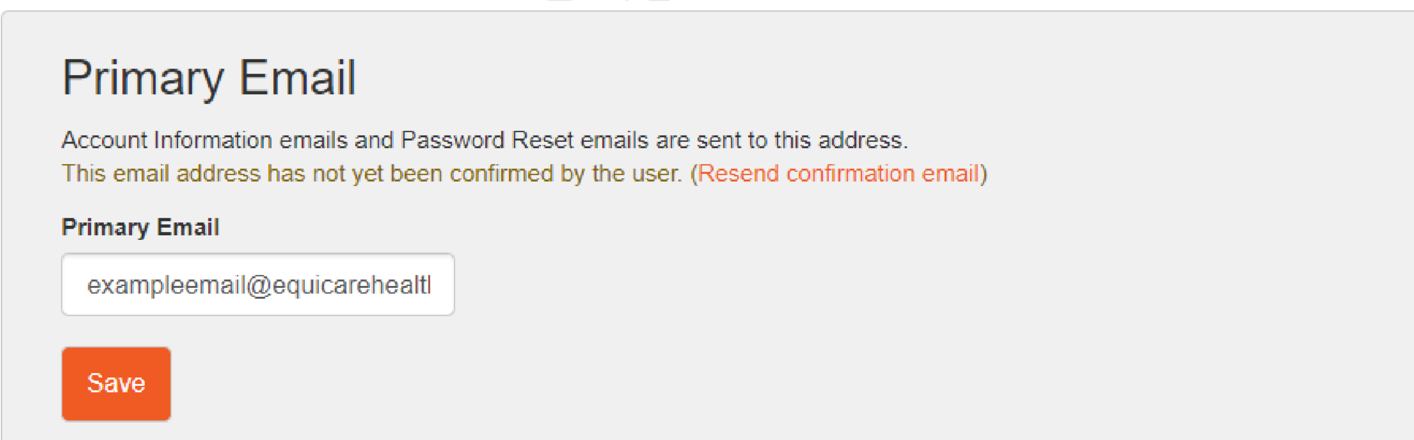
The Account Status area shows the user's Username, if their account is currently authorized, if they are temporarily locked out of their account, the date that the account was created, when they last logged in, and when they last performed an action within the Patient Portal (view a page, sent a secure message, etc.).



- **Locked Out**: If a user has tried to login to their account unsuccessfully 3 times in a row, they will be temporarily locked out. If a patient is locked out, the user will see the option to unlock the account within the Account Status area. Note: the system will automatically unlock a user account after 10 minutes. So, in most cases, manual intervention is not necessary.
- **Unauthorize User:** A user account can be disabled by clicking the Unauthorize User button. This means that the user will no longer be able to log in to the Patient Portal. All account information is retained, including the Username. To authorize a user that has been unauthorized, you must print a re-invitation letter and provide it to the patient. The letter contains the instructions to reauthorize their account.

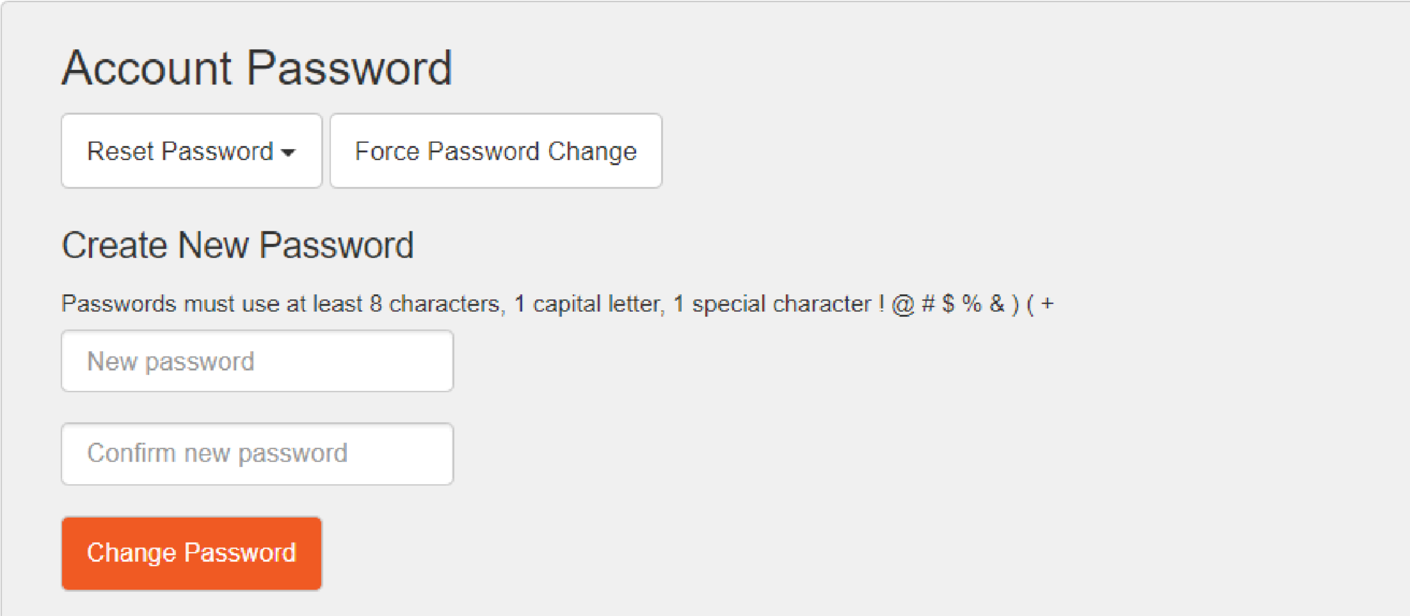
Primary Email

The Primary Email address is where the patient will receive emails related to their patient portal account, such as password reset emails. When signing up for the Patient Portal, a patient must provide their email address, which will be used here. It can be changed manually from this area by entering an email in the field and clicking Save. When the email is changed, a confirmation email will be sent to the address. The confirmation email can be resent from this area as well.



Account Password

In the Account Password area, the user can manage the patient's password.

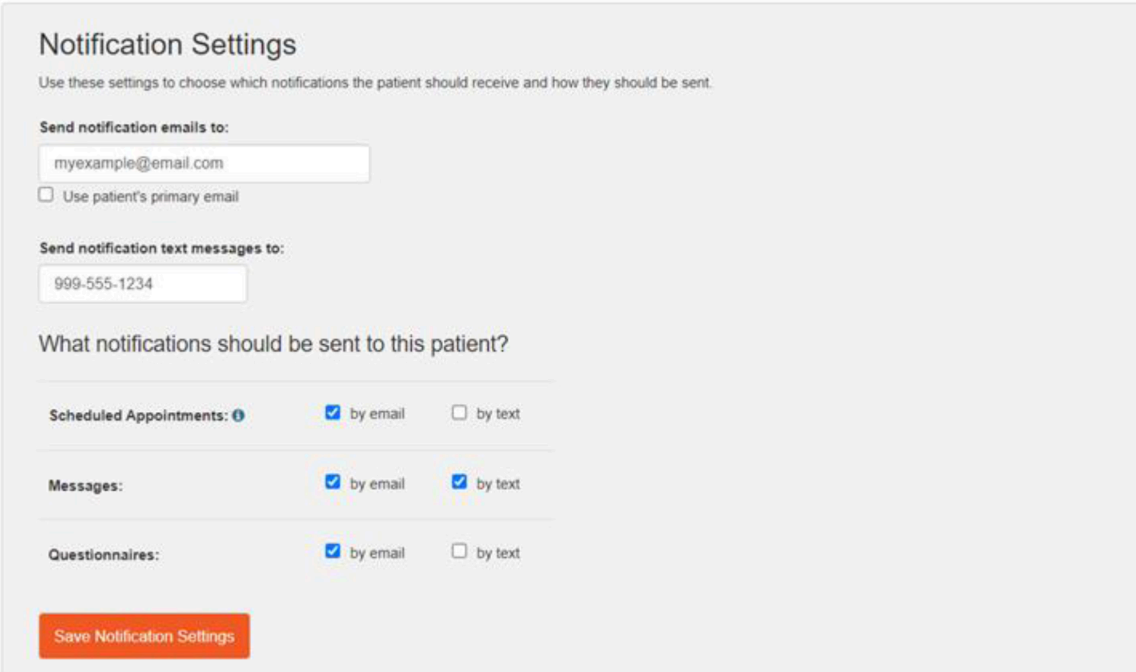


- **Create New Password:** Enter a new password into the field and the same password into the confirmation field, then click Change Password. The password updates immediately. Note that the patient is not automatically notified of the password change.
- **Reset Password:** Choose to either send the patient an email with a link to reset their password, or print a letter with a temporary password. In both cases, their password is reset. The patient must use the link in the email or the temporary password and then change their password before they can log in again.
- **Force Password Change:** The patient will be required to change their password the next time they log in.

Manage Notifications

Patients can be notified of their appointments, follow-ups, secure messages, and questionnaires via email and/or SMS messages. The availability of each of these features is part of the system configuration.

How often notifications are sent, and how many days prior to the event they are sent, are part of the Facility configuration settings. From the Manage User Account page, users can configure which notifications the patient should receive, and whether they should be sent via email or text message. These option are available regardless of the status of the patient's user account.



1. To send email notifications, an email address must be specified. It can be the same as the Primary Email, or can be a different address.
2. To send text messages, a phone number must be provided.
3. For each type of notification, select if it should be sent by email and/or by text message. Note: If the facility is configured to send appointment notifications as a digest, those digests can only be sent via email.
4. Click **Save Notification Settings** to save changes.

Sample Notification Messages

Sample e-mail reminder of a monthly digest of appointments:

7/10/2012 3:18 PM

Dear Gail,

This is a friendly reminder of your upcoming appointment(s):

Thursday, 7/12/2012	11:10 AM Physical Therapy Referral	Add to calendar
Wednesday, 7/25/2012	11:00 AM Dietary Referral	Add to calendar
Wednesday, 7/25/2012	11:01 AM Other Referral	Add to calendar

To reschedule or cancel, please call ABC Clinic at (555)555-5555 at least 24 hours before the scheduled appointment.

Thank you.
ABC Clinic

Sample text message notification:

> This is a reminder that your Consultation is on 9/13/2016 at Doctor Offices. To reschedule or cancel, please call ABC Clinic at (555) 555-5555 at least 24 hours before the scheduled appointment. Thank you.

Note: The content of the messages sent to patients can be customized by an Equicare Administrator within the Manage Templates feature (EQUICARE Admin > Manage Templates). See the *Manage Templates* section of this guide for more information.

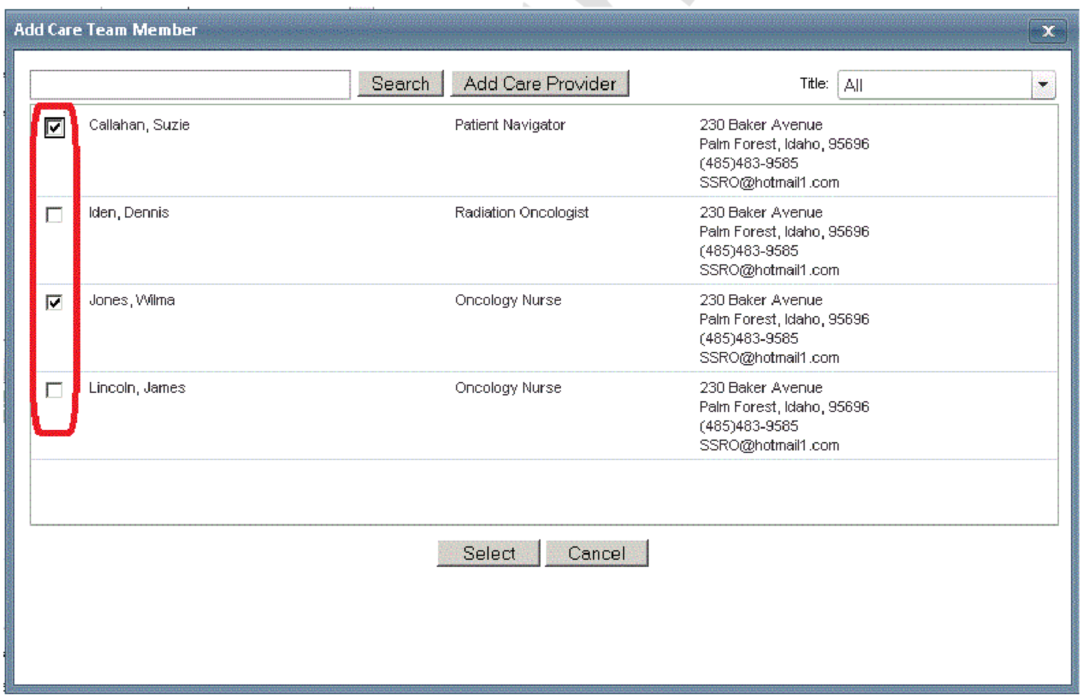
Care Team

The care team can be used to list all care providers that have direct responsibility for caring for the patient. The care team serves two purposes:

1. Populate dropdown lists in the appointments (provider), follow-ups (provider), reminders (owner), treatment summary (provider) referrals (referred by) screens.
2. Provide care provider information such as name, address and phone numbers to patients using the contact cards on the patient portal.

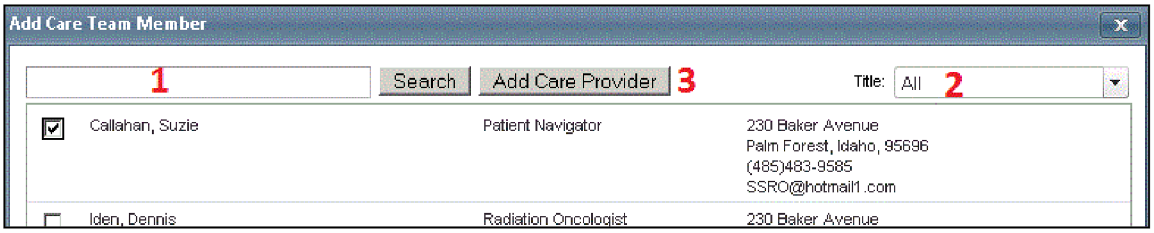
To add a member to the patient's care team:

1. In the Patient>Care Management> Care Team area, click the 'Add Members' button. The Care Team Favorites list for the facility will open in a new window.
2. Select one or more care team members from the list by checking the box in front of each name.



3. If the desired care team member is not found on the list, there are 3 options:
   - To find an existing care provider who is not in the favorite lists, enter a first or last name in the search box. Click the Search button (#1 below).
   - Alternately, choose a title of a care provider. Any care provider with that title will be displayed (#2 below).

- To add a care provider NOT in the Equicare system, click the Add Care Provider button. Enter the details of the care provider. Save the care provider. Once saved, the care provider can be found through the search (#3 below).



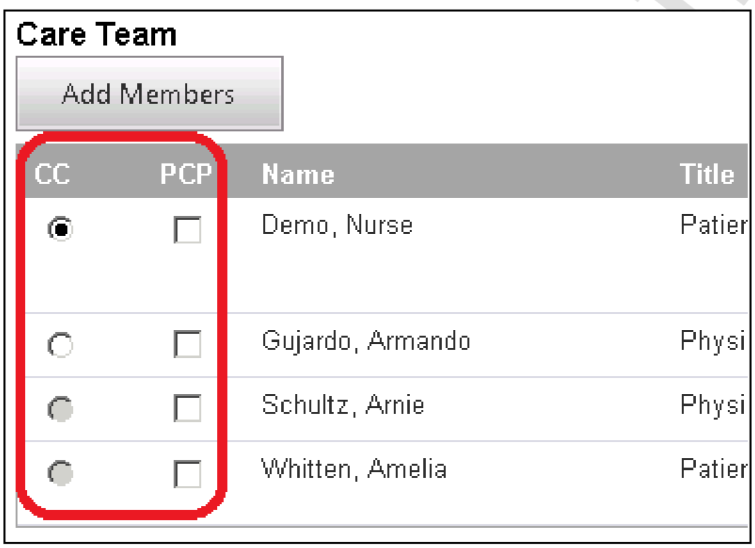
4. Once the desired care team members are identified, click on “Select”. All checked members will be added to the patient’s care team.
5. Click the “Save” button to save changes.

To assign a Care Coordinator for a patient:

1. Select the “CC” radio button beside the appropriate member. The care coordinator must be an internal care provider (cannot be users with "read-only" access).
2. Click the “Save” button to save changes.

To specify the primary care physician(s) for the patient:

1. Select the "PCP" checkbox(es) beside the appropriate member(s).
2. Click the “Save” button to save changes.



To remove a member from the patient's care team:

1. Select “Remove” checkboxes beside members to be removed from the patient’s care team. Their names will be displayed with a strike-through.
2. Click the “Save” button to save changes.

Workgroups

Workgroups are designed to assist in segregating patients and care providers. To set-up workgroups in Equicare, **Section 2: Equicare Administrator Training>Lesson 1.**

Assigning a patient to a workgroup allows all care providers that belong to the same workgroup to access the patient's record. If the patient is not assigned to any workgroups, only the care providers who are in the patient's care team can access the patient's record.

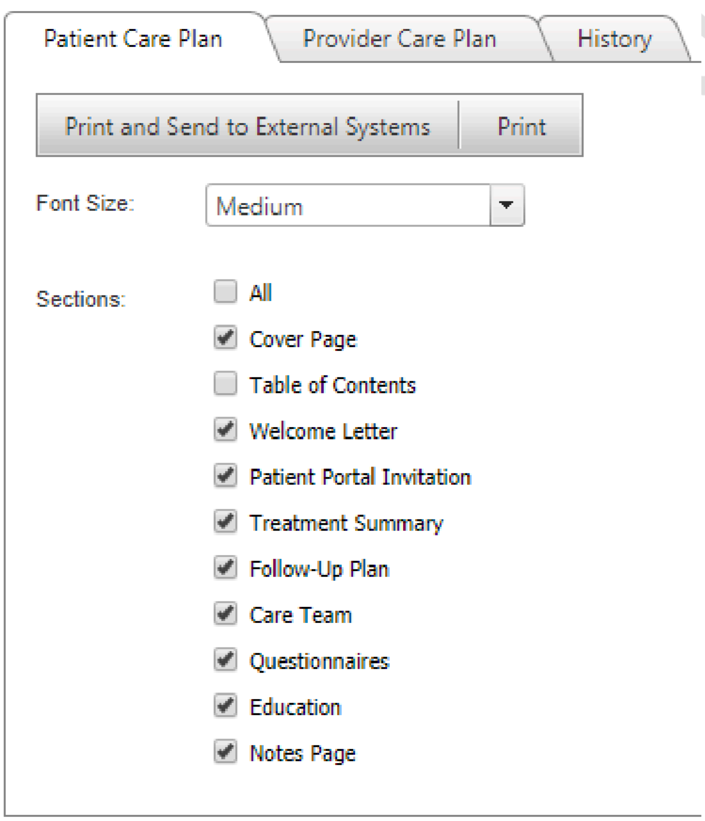
To assign workgroups to the patient:

1. In the Care Management screen, select the appropriate workgroups by checking the checkbox beside the workgroup names.
2. Select "Save" to complete.

Care Plan Printing

The Care Plan Printing screen allows the Care Provider to print a Care Plan package for the patient or another care provider.

Patient Care Plan tab: Print a Care Plan package for a patient. Select the components of the Care Plan package to be printed. Select the font size.



The care plan selected can be printed by clicking the **Print** button. To print the care plan and also send it to an external system such as ARIA, click **Print and Send to External Systems**.

Previewing or printing will open a new browser window. If you do not have a PDF file reader installed on your computer, you will be prompted to download the PDF file that contains the Care Plan package and save it on your computer.

Provider Care Plan tab: Print or fax a Care Plan package for another care provider. Select the 'To:' and 'From:' care providers. The contact information for each provider is shown in the area below the care provider's name. If the information needs to be changed or updated, the Edit action can be used to update the information. Note: Updates to the contact information are saved in the Equicare system.

Select the components of the Care Plan package to be printed or faxed. The Fax Cover Sheet and Provider Letter template can be modified by the user before printing/faxing. If the information needs to be modified, the Edit action can be used. Note: Making changes in this workflow does not modify the underlying templates in the Equicare system.

The care plan selected can be printed by clicking the **Print** button. To print the care plan and also send it to an external system such as ARIA, click **Print and Send to External Systems**.

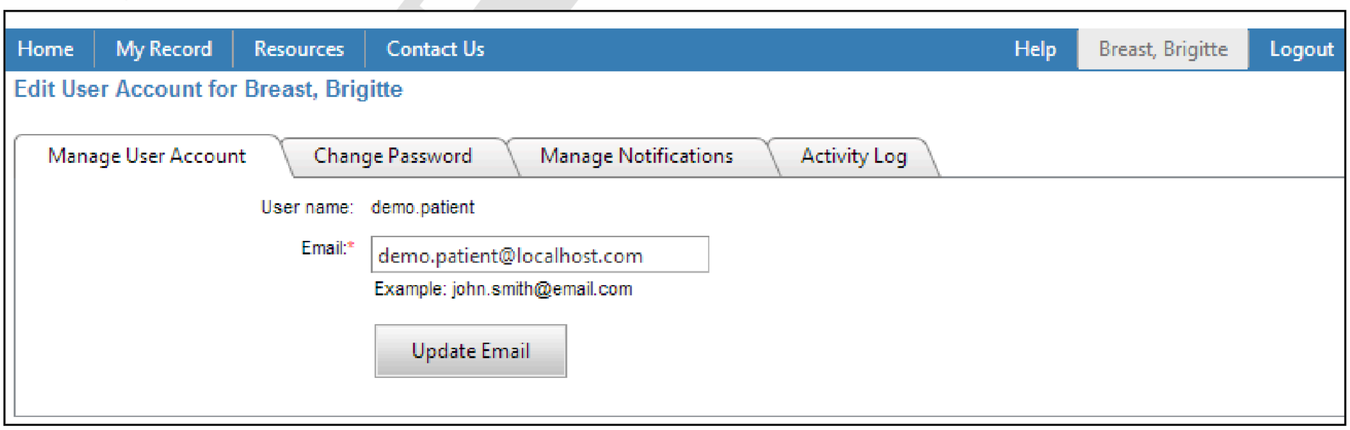
The care plan selected can be faxed by clicking the "Fax" button. Note: for the fax button to be available, the fax service must be added by an Equicare Service technician.

Previewing or printing will open a new browser window. If you do not have a PDF file reader installed on your computer, you will be prompted to download the PDF file that contains the Care Plan package and save it on your computer.

History tab: If a patient or care provider care plan have been generated, a record of the action will be shown in the History tab. Clicking on the Preview action at the end of the row will display the care plan that was created.

Patient Account Self-management

The patient is also able to manage some of their account settings while logged into the patient portal. In the Patient Portal, the patient can click on their own name on the Navigation bar. They will then be presented with the opportunity to update their e-mail address, change their password, manage the notifications sent to them and view the activity that has taken place on their account.



Forgotten Password

In the event that a patient cannot remember their password, the Equicare log-in screen has a Forgot Password link. This link can be used by patients or clinical users.

If a patient clicks on the link, they are asked to enter their Equicare user name. Clicking on the 'Send Password' button will result in a temporary password being sent to the e-mail address linked to the patient.

Lesson 4: Education Library

The Education Library is a collection of information related to different cancer diagnoses. The primary category for organizing content is the cancer site. Each cancer site has information on diagnosis and work-up, treatment, support, and follow-up relevant to that patient population. The Education Library is available within the *Resources* menu.

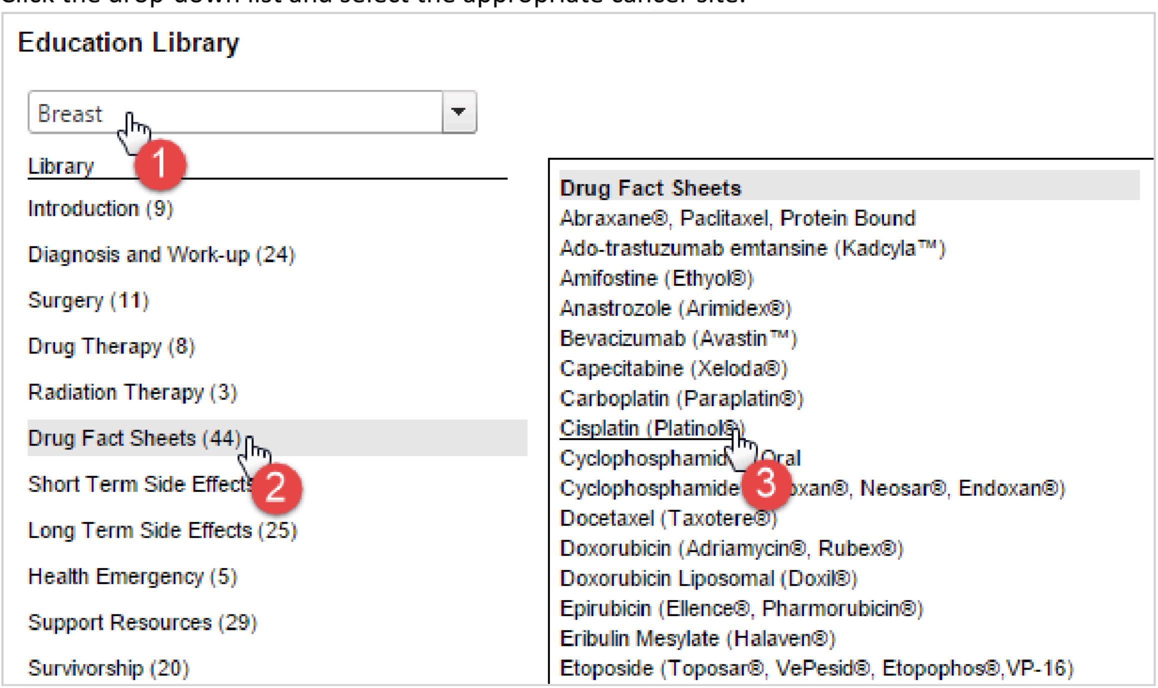
The content within the Education Library is compiled by one of the world's largest online cancer information providers. The library may also include local information added by your EQUICARE Administrator.

> **Note:** The Education Library in the Resources menu serves a different purpose than the ability to assign education to patients. The library contains all available content in the system, which can be browsed through and read by anyone logged in. In contrast, when assigning education to a patient you can choose a selection of articles from the entire Education Library, but the assigned articles become a recommended *reading list* for the patient.

Viewing Education Articles

To view the content of an article, use the *Search Library* feature to perform a search for your desired content, or follow the below steps to browse the library by cancer site and category.

1. Go to the *Resources* menu and click **Education Library**.
2. Click the drop-down list and select the appropriate cancer site.



3. Click the desired library category.
4. Click the article title.

The article will open in a new browser window or tab, and can be saved or printed using the browser options.

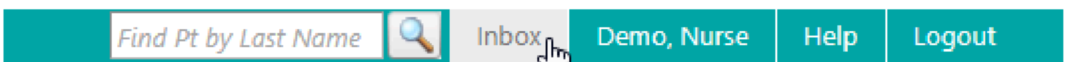
Note: Adobe Acrobat Reader (available at https://get.adobe.com/reader/) is required to view the articles in the Education Library. It may also be necessary to set your browser to allow popups for the Patient Portal website.

To search the library, use the *Search Library* field. You can search by words or phrases separated by commas, which will be matched against the article titles and keywords.

Lesson 5: Secure Message Inbox

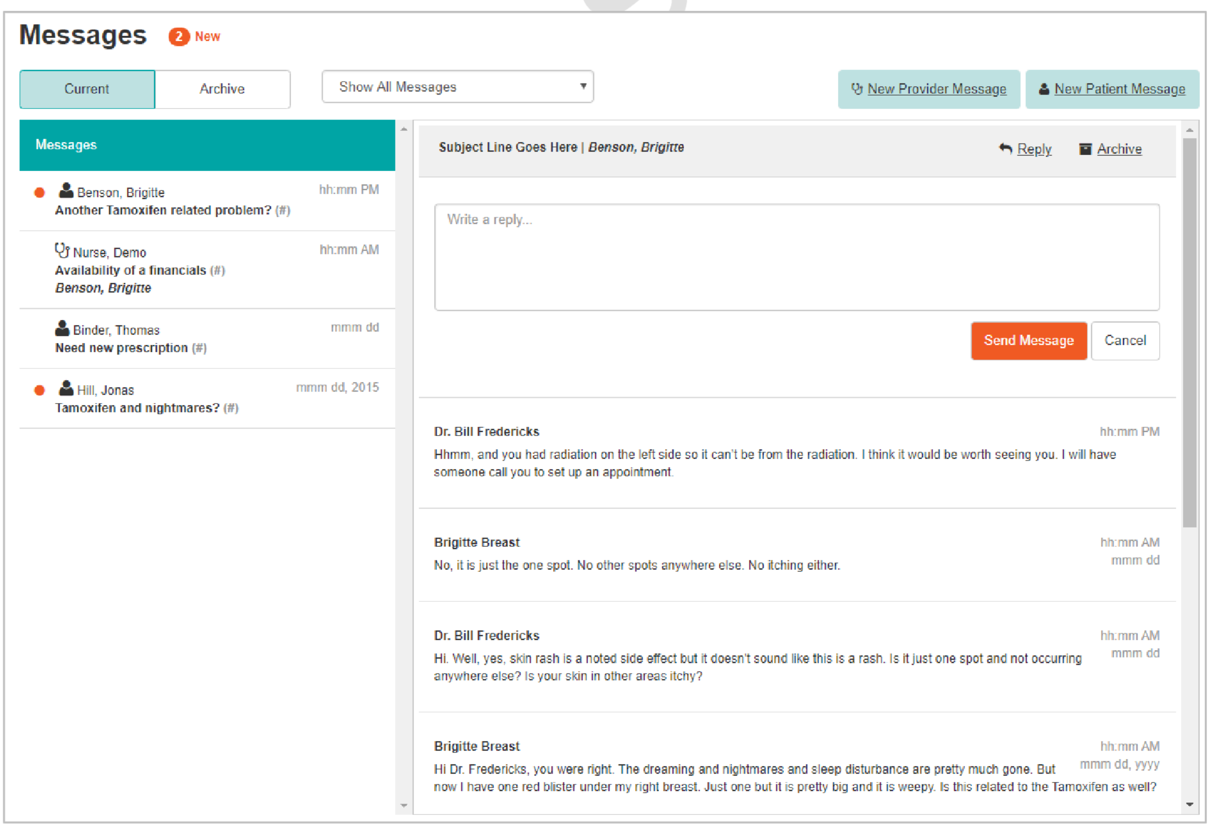
The Secure Message Inbox allows messages to be sent between care providers and patients, and between care providers, in a safe and secure manner. Any information sent using the Secure Message Inbox is more secure than using regular e-mail.

The Secure Message Inbox is accessible from the *Inbox* option in the main menu. The *Inbox* menu option will also indicate when there are new messages in the inbox.



Receiving a Secure Message

The inbox will list all Secure Messages on the left. Each item in the list includes the name of the sender, the date and time the message was received, the message subject line, and an icon to indicate if the message is from a patient or a provider.



Once a message is sent, all replies to it are grouped together under the original, forming a single thread. Clicking the message in the list on the left will display all messages sent regarding that topic.

Patient Messages vs. Provider Messages:

- A Patient Message includes one patient and one care provider. A Provider Message can include as many care providers as you need.
- For convenience, a patient can be added as a reference within a Provider Message. However, that patient will never receive a Provider Message. Adding a reference makes it clear to everyone in the conversation which patient is being discussed.
- Care Providers can be added to or removed from a Provider Message at any time after the conversation has started, and a care provider can remove themselves at any time (except the person that originally sent the message).
- In the list of inbox messages, patient messages have an icon of a person, and provider messages have an icon of a stethoscope.

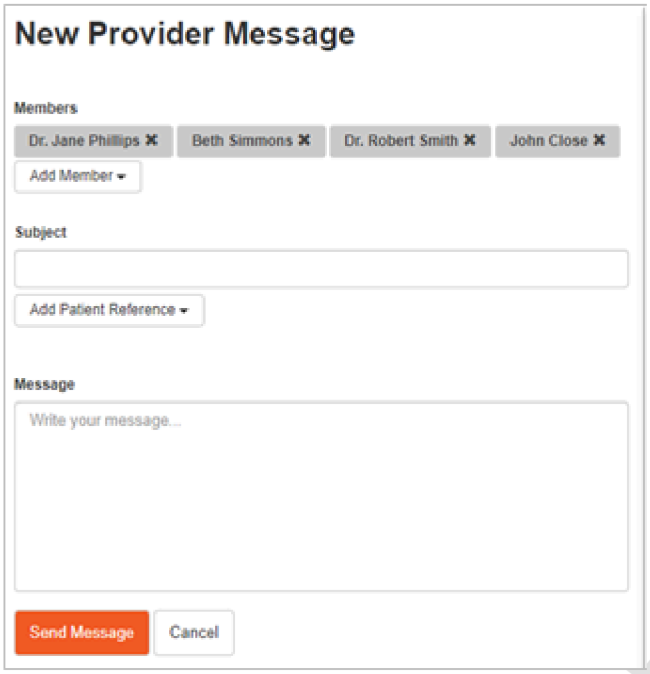
Sending a Secure Message to a Patient

To send a message to a patient:

1. Click the **New Patient Message** button.
2. Click the **Select Patient** dropdown and either select a patient from the list (populated with up to five of the most recently accessed patient records) or click Find more to search for a patient.
   a. When searching for patient, search by Last Name, First Name, and/or MRN. Select the desired patient in the list and click the **Select** button. Note that the list will display a maximum of 100 results.
   b. To remove a selected recipient, click the X button next to their name.
3. Enter the text for the Subject line.
4. Enter the message text.
5. Click **Send Message**.

Note: When viewing a patient in context, you can click the **New Patient Message** link in the Actions panel, which will open the same options as above and automatically include the patient currently in context.

<u>Sending a Secure Message to a Provider</u>



To send a message to a Provider:

1. Click the **New Provider Message** button.
2. Click the **Add Member** dropdown and either select a provider from the list or click Find more to search for a provider.
    - The list is automatically populated with the Favourites configured for your Facility. If a patient is selected as a reference (see steps below), the list will instead be the patient's care team.
    - When searching for provider, you can search by Last Name and/or First Name, and filter the results by Facility and Title. Select one or more of the desired providers in the list and click the **Add** button. Note that the list will display a maximum of 100 results.
    - To remove a selected recipient, click the X button next to their name.
3. Enter the text for the Subject line.
4. (Optional) Select a patient to include as a reference using the Add Patient Reference dropdown. This is the same process as adding a patient recipient when sending a Patient Message. However, patient's included as a reference never receive any of the messages sent to providers.
5. Enter the message text.
6. Click **Send Message**.

Adding and Removing Members

When viewing a message thread between providers, a list of all members (i.e. message recipients) is displayed at the top. The provider that originally created the message can remove members from the message by clicking the X next to their name and add more members by clicking the *Add Member* button, but they cannot remove themselves from the message.

All other members of the message can remove themselves by clicking the *Leave Thread* button, or add new members.

When a member leaves the thread or is removed, they will no longer receive new messages for this subject, but will still be able to view everything up until the point they were no longer a member. If a member used the *Leave Thread* option, the message thread will also be automatically archived.

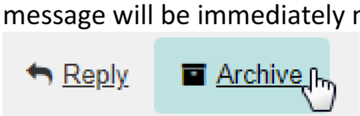
Replying to Messages

When viewing a message, you can reply by clicking the Reply button at the top right of the message area, typing your reply, then clicking the **Send Message** button.

Archiving Messages

Archiving messages is a good way to ensure the inbox contains only relevant messages.

- To archive a message, select it in the list on the left, then in the message area click the **Archive** button. The message will be immediately moved to the Archive section.

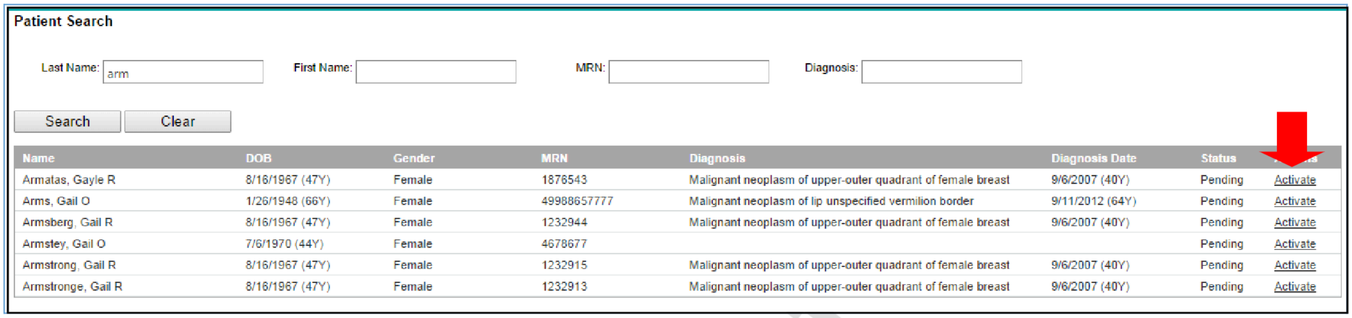


- To view all messages that have been archived, click the **Archive** button at the top of the inbox.
- To Unarchive a message, view the Archive section, select a message, and in the message area click the **Unarchive** button.
- If a message is archived and another person response to the message, it will be automatically unarchived and moved to the inbox.

Appendix A: Activating a Patient through the Patient Search

The Patient Search allows users with Equicare Administrator permissions to find patients to activate in EQUICARE. Upon activation, the Patient Activation Wizard (PAW) guides the care provider through the major functions within EQUICARE, ending with the ability to print the patient's care plan.

1. Go to Worklists>Patient Search
2. Search for the desired patient.
3. At the right end of the patient row, click on the Activate link to start the PAW.



Name	DOB	Gender	MRN	Diagnosis	Diagnosis Date	Status	
Armatas, Gayle R	8/16/1967 (47Y)	Female	1876543	Malignant neoplasm of upper-outer quadrant of female breast	9/6/2007 (40Y)	Pending	Activate
Arms, Gail O	1/26/1948 (66Y)	Female	49988657777	Malignant neoplasm of lip unspecified vermilion border	9/11/2012 (64Y)	Pending	Activate
Armsberg, Gail R	8/16/1967 (47Y)	Female	1232944	Malignant neoplasm of upper-outer quadrant of female breast	9/6/2007 (40Y)	Pending	Activate
Armstey, Gail O	7/6/1970 (44Y)	Female	4678677			Pending	Activate
Armstrong, Gail R	8/16/1967 (47Y)	Female	1232915	Malignant neoplasm of upper-outer quadrant of female breast	9/6/2007 (40Y)	Pending	Activate
Armstronge, Gail R	8/16/1967 (47Y)	Female	1232913	Malignant neoplasm of upper-outer quadrant of female breast	9/6/2007 (40Y)	Pending	Activate

Once the PAW has been started, a care coordinator must be assigned and the patient saved. After that, the care provider can continue through the PAW. The PAW will lead the care provider through:

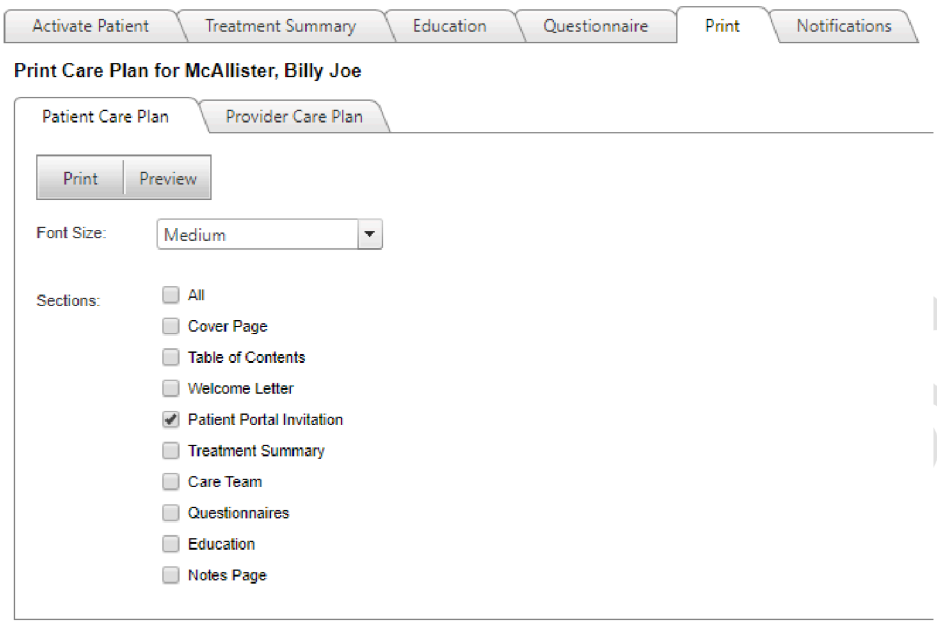
1. Referrals: An opportunity to enter any referrals known at this time.
2. Care Team: add Care Team members from the favorites list or find more care providers and institutions in the system.
3. Treatment Summary: All detail provided through the OIS interface will be populated. Add additional treatment summary records as shown in **Section 1: Lesson 4** of this workbook.
4. Follow-up: Assign the appropriate follow-up and surveillance templates as shown in **Section 1: Lesson 4**. The follow-up plan will be accessible after you have completed patient activation.
5. Education Materials: Select and assign the appropriate education articles as shown in **Section 1: Lesson 4**.
6. Questionnaires: Assign the appropriate patient questionnaires as shown in **Section 1: Lesson 4**.
7. Print: Select the care plan components and font size for printing. The care plan document will generate and display in a new screen. Review and print and/or save as desired.
8. Notifications: set up follow-up, appointment, secure message and questionnaire e-mails and SMS messages.

Select Finish on the right side of the screen to complete. The patient is now activate.

The care provider is able to exit the PAW at any time after the care coordinator has been assigned. The PAW can also be restarted at any time using the Patient Wizard link in the Actions column.

Appendix B: Patient Sign-up Process

When activating a patient in the Equicare CS system through the patient activation wizard, an invitation letter for the patient can be printed from the Print tab.



It can also be printed by going to *Patient > Manage Patient* and clicking **Print Invitation**.

The letter received by the patient can be customized to include facility information. The letter can be given to the patient at a clinic visit, e-mailed to the patient or fax/mailed to the patient.

REGIONAL HOSPITAL SATURNA Cancer Center

Smeth, Janine
MRN: MR49399

Patient Invitation
Printed on: 9/18/2017
INV-1

Dear Janine Smeth,

As part of our services, we invite you to access your records through our secure, online patient portal. This is a website that you and your family members can use to access your health care information. To sign up for the patient portal, open your internet browser, and in the address bar type:

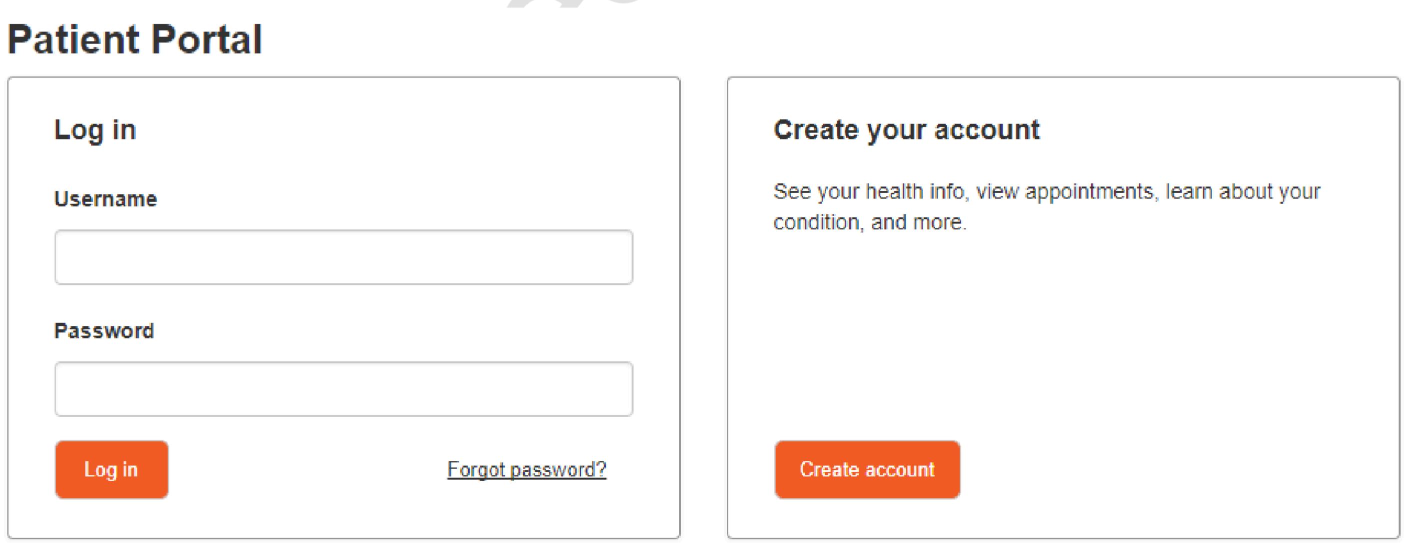
http://ecs.equicarehealth.com

Create your Account

1. On the portal homepage, click **Create account**.
2. In the First Name field enter: **Janine**
3. In the Last Name field enter: **Smeth**
4. Enter your date of birth.
5. In the PIN field, enter: **2228973**
6. Click **Next**.
7. Enter your email address, then create a username and password for your new account.
8. To use the patient portal, you must review and agree to the *Terms of Use*.
9. Click **Create my account**.

Your new account will be created and you will be logged in automatically.

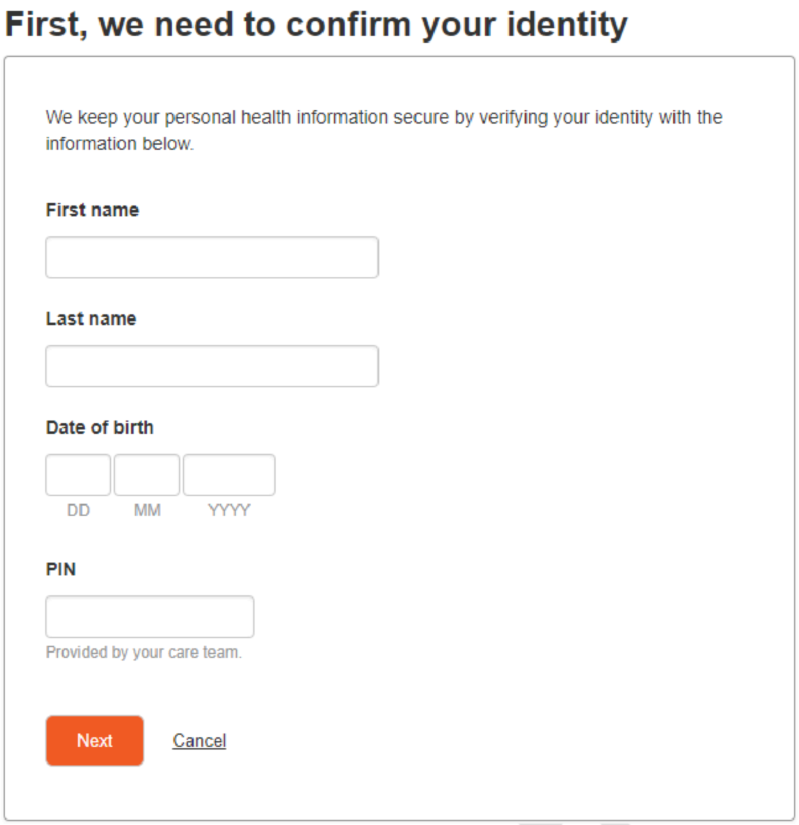
Once the patient has the invitation letter, they can sign up on the system. Using the website address provided on the invitation letter, the patient can arrive at the Equicare CS log in screen. Patients should be encouraged to add this to their favorites list for easy navigation.



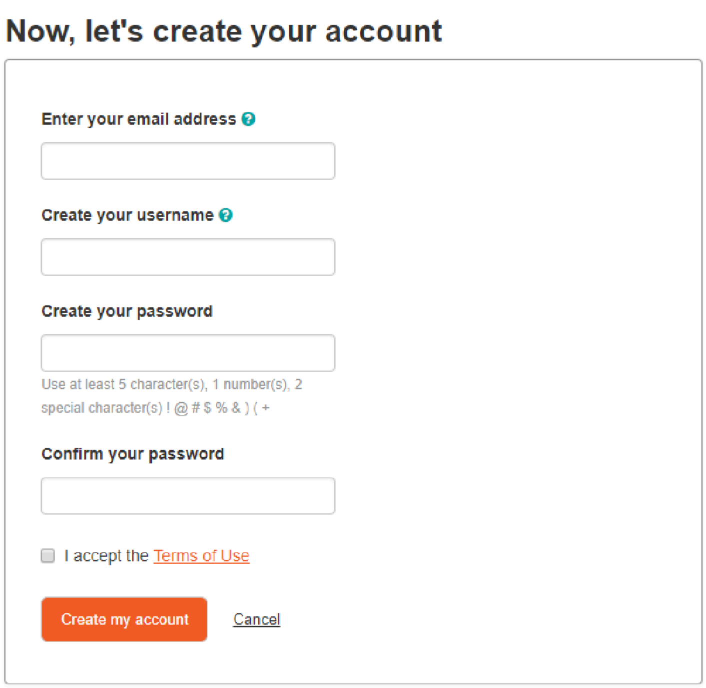
To sign up, patients must:

1. Click the **Create Account** button.

2. Enter their name as it appears on the invitation letter, their birthday, and their PIN.



3. Click **Next**.
4. Enter their email address, create a username and password for their account, and read and accept the Terms of Use.

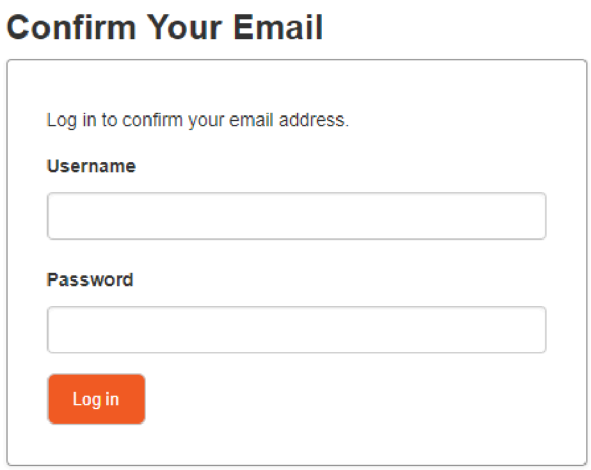


5. Click **Create my account**.

After successfully signing up, the patient will be logged in automatically.

Confirming the Patient Email Address

The patient will be asked to confirm their e-mail address. This is required if the patient needs to reset their password in the future. After signing up, they were send a confirmation email to the address they provided. To confirm their address, they must click the link in the email they received, and when prompted, enter their account username and password, and click log in.



They will be logged in to their portal account and their email will be confirmed.

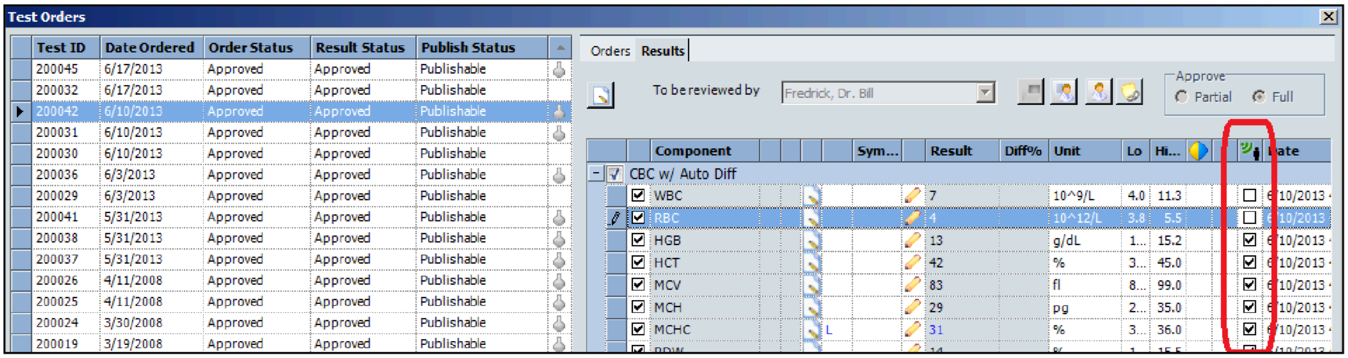
Note: If the patient does not confirm their email address, they will receive a reminder every time they log in. If they need to change their email address, they can do so by going to the *Account Menu* (labelled with their name) and selecting **Account Settings**.

Appendix C: Test Result and Diagnosis Publishing from ARIA

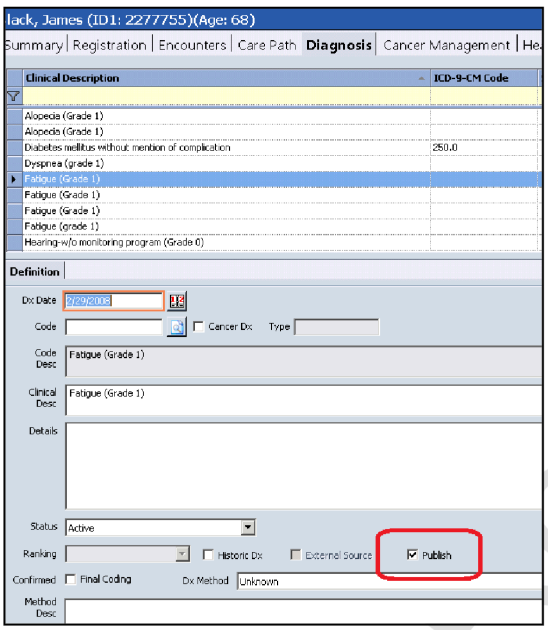
Users with ARIA v13 MR1 or ARIA v11 MR5 have the capability to publish test results and cancer-related diagnoses. When used with EQUICARE 4.2 MR1 (or more recent), a test result or diagnosis with a published status in ARIA will automatically be published to the patient portal and be available to a patient.

Customers may choose to use the existing Equicare publishing feature or publish test results to the patient-portal from within ARIA. Both features cannot be used simultaneously. In order for either feature to work, the systems must be configured to allow transfer of information. An Equicare Service technician can configure the connection depending on the publishing method preferred.

To publish a test result in ARIA, the user needs to be in the Evaluation tab. Tests and Test Results are available in this section. Once a specific test result is selected, the results will be displayed. The column, circled in red below, controls the publishing to the patient portal. By default, all results are selected. Once the test results are approved, they will be available to the patient on the patient portal.

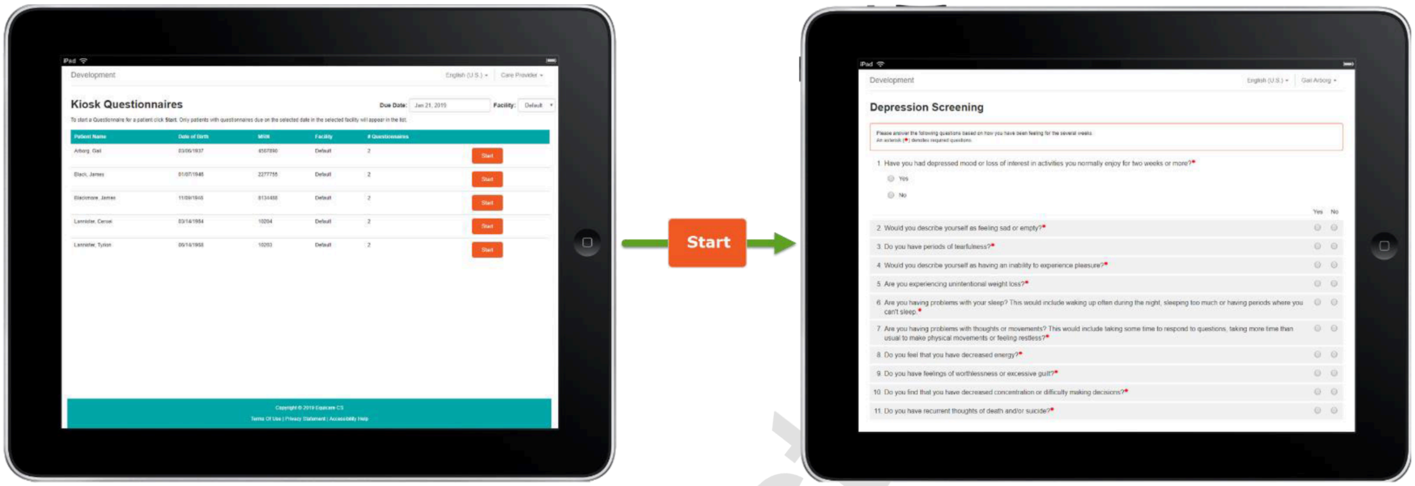


For diagnosis publishing from ARIA, the user needs to be in the Diagnosis tab. Each diagnosis will now have a publish check box available. This box is selected by default. If the box is checked, the diagnosis will be available on the patient portal once approved in ARIA.



Appendix E: Questionnaire Kiosk

The Questionnaire Kiosk allows you to provide a way for patients to complete questionnaires onsite, for example, while in a waiting room. This feature is best used on a mobile device like a tablet. When a patient arrives onsite, a staff member looks them up in the Kiosk Administration, start their Questionnaire Kiosk session, and hands the tablet to them. When they are done, they give the device back.



Care Provider **Patient**

The Kiosk website is designed to come in contact with patients, so the Kiosk Administration page is separate from the rest of EQUICARE and has a different login. The website address of the Kiosk Administration login depends on the domain of the Patient Portal. The login takes the form: <patient portal domain name>/kiosklogin

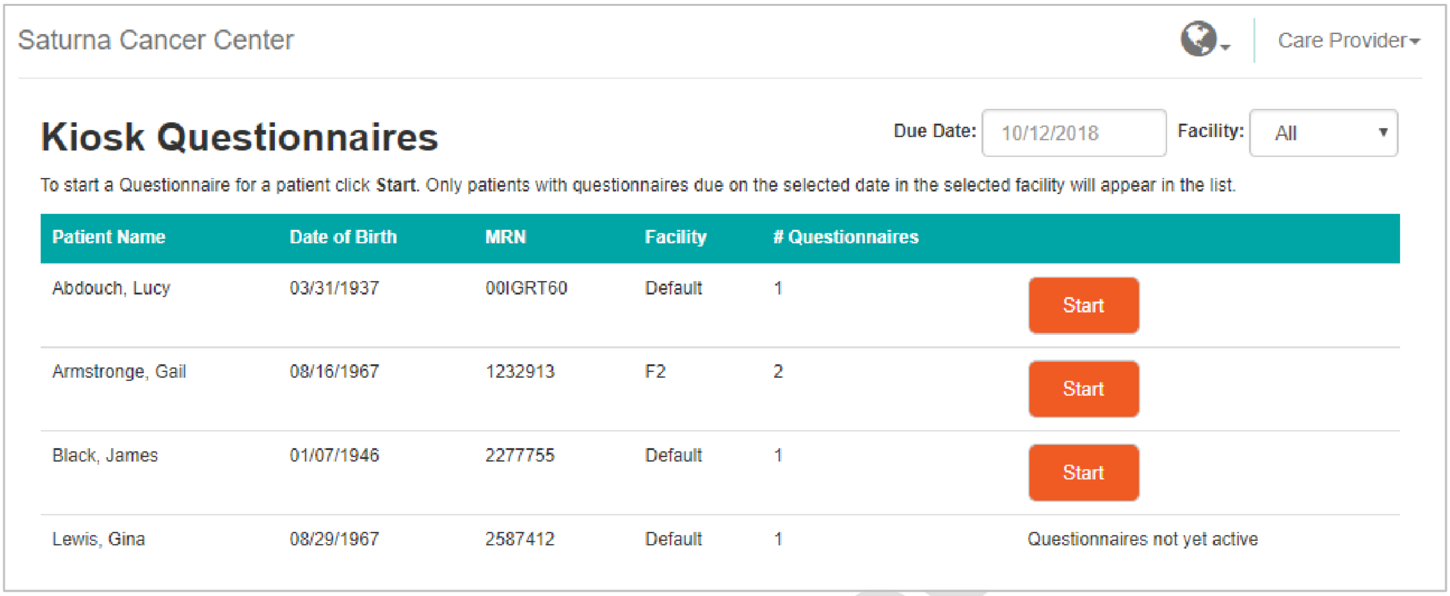
For example, if your patient portal domain is *www.patientportal.com* it would be *www.patientportal.com/kiosklogin*

The first step of the process is to log in at that website address using your regular username and password that you use for the Care Provider Portal. Note that your user account must have **Kiosk Manager** permissions to be able to login. If needed, an Equicare Administrator can assign those permissions to your account.

After logging in, you will see the administration page where you can locate the patient that will be completing the questionnaire.

Kiosk Administration

Patients must have at least one assigned questionnaire to appear in the *Kiosk Questionnaires* page. By default, the page will display patients from your current facility (based on the Patient Portal domain you used to log in) that have a questionnaire due on the current date.



Most of the time the default list will contain the people you are looking for. However, in the case where a patient recently changed their appointment date (to one that is different from the due date of the questionnaire) or had to go to a different facility, you can use the *Due Date* and *Facility* filters to adjust the Kiosk to look at a different date or facility.

When you locate the patient, click the **Start** button. You will be shown a prompt that will help you confirm you've selected the correct patient and display a list of all their currently active questionnaires. Note that they will be able to access and complete all questionnaires in the list. Once you accept the confirmation prompt, your administration session will end (you will be automatically logged out) and the Kiosk will switch to the patient session.

<u>Patient Questionnaire Session</u>

Once the patient's session has started, the patient can interact with the kiosk to complete their questionnaire(s). This process looks and works the same way as when the patient accesses questionnaires in the Patient Portal. However, when using the Kiosk, patients cannot access anything other than their questionnaires.

When the patient finishes their final questionnaire, they will be asked to click a button that will end their session and return the kiosk to the administration login page. At that point, you can interact with the Kiosk again, log in, and choose the next patient.

Section 2: Equicare Administrator Training

Lesson 1: Administration of Clinical User Accounts

When logged in as an Equicare Administrator, there are several ways to configure and add to your Equicare system. An Equicare Administrator account will be created to allow a staff member of the clinic /hospital to manage users.

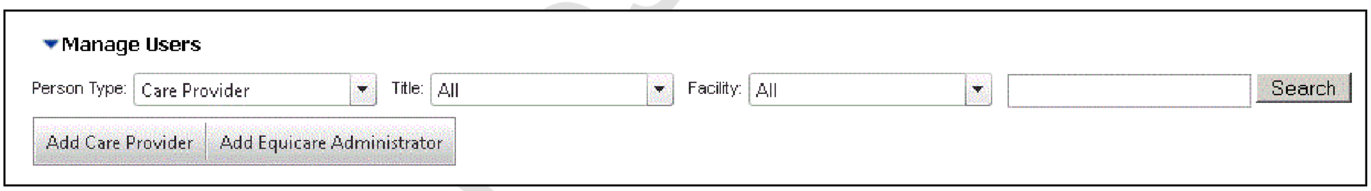
Important information about User Accounts

- A care provider must have an email address on file to access EQUICARE.
- Password requirements are system wide settings. Speak to an Equicare Administrator if you are having difficulty.
- After three unsuccessful login attempts, the user will be prohibited from logging in until the account has been reset.

Manage Users

Once the Equicare Administrator has logged in, the EQUICARE Amin tab will be available on the navigation bar. Go to EQUICARE Admin > Manage Users to list all the users in the system or to add a new user.

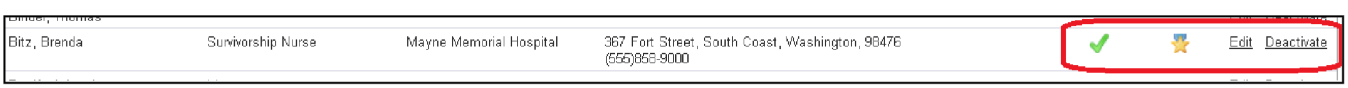
Filters are available across the top of the page to narrow the list of users. The filters available are Person Type (Care Provider or Equicare Administrator), Title (all titles in the system), Facility (will list the facilities that the Equicare Administrator has access to), and search (for name).



The 'Add Care Provider' button will open a window to add information about the Care Provider. The user account user name and password as well as permissions, patient access and facility access are defined here.

The 'Add Equicare Administrator' button will open a window to add a basic level of information and create a user name and password for an Equicare Administrator.

At the right end of each line, there is a Login indicator, Favorites icon, Edit function and Deactivate function.



Login indicator

A green checkmark in the Can Login column indicates that the user has an active Equicare account with a user name and password. In order to have this, the user permissions, patient access and facility access must be set.

Favorites

The Favorites is a facility specific list of most often used care providers. This list will appear in many places in the Equicare software such as when adding members to a patients care team (Care Management) or where the icon is available for care providers. The star icon will show whether a user is on a Care Team Favorites list ( ) or not (column is blank).

The Equicare Administrator can add or remove users from the Favorites list through the Manage Facilities>Care Team Favorites screen.

Edit

Clicking on the Edit will lead to the information page for the user. An inactive user will have the Inactive checkbox selected. An inactive user is no longer available to be used within Equicare.

The information about the user is on 2 tabs:

1) Profile: the demographics, care provider photo, and contact information are shown on this tab. Additionally, any external systems that the user is connected to (for Secure Messaging) are indicated here. Other indicators are also available for:
   i. Automatically include in the patients care team (when added to a referral)
   ii. "Out of Network" (for referrals)
   iii. Internal Communication (email and phone)

   For Secure Messaging, select the desired Inbox among the options available in the dropdown box. Available options are (and may not always be available) :
   i. **"None"** : Select this option for a Care Provider who do not want to exchange Secure Messages with any patient.
      - This option is always available.

ii. **"Equicare"** : Select this option for a Care Provider who wants to exchange Secure Messages with patients, and wants to use the Secure Message mailbox located in ECS.
   - This option is always available.
   - This option is the only possible option for Care Providers working with a Non-ARIA system.

iii. **"ARIA RO"** : Select this option for a Care Provider who wants to exchange Secure Messages with patients, and wants to use the Secure Message mailbox located in an ARIA system.
   - This option is only available when ECS is connected to at least one ARIA system.
   - The user is able to select one ARIA system to use as their primary ARIA mailbox.
   - When this option is selected, Care Providers shall ensure that the corresponding option is also selected in the corresponding ARIA system. Failing to do so may result in inconsistencies in Secure Messages reception and delivery.

2) User Account: The user name and password are set up here (if the user account is enabled). Enabling a user account allows the user to login to Equicare. The scope of user rights are set here using three concepts:

   i. Permissions: The permissions available for users are:
   - Read Only- provides the user with access to view only.
   - Limited Read and Write- allows the user to review patients' records with some ability, in certain areas, to modify the record.
   - Read and Write-allows a user to make and save changes to the patient record throughout the system.

   Additional Permissions are available for:
   - Equicare Administrator- provides the user access to the EQUICARE Admin menu
   - Equicare Analytics- provide the user access to the Analytics menu

   ii. Patient Access: Access to patients is limited, by default, to those care providers who are a member of the patients care team. Those users are able to find patients through the patient search and My Patients worklist. The "All patients in selected facilities" option provides further access to all the patients in the user's facilities. Additionally, a user can be assigned to any workgroups created in the system. A user is able to search and find a patient if they share a common workgroup.

   iii. Facilities: Defines where the user works. The selected facilities will determine which:
   a. Care provider portal the user can login to
   b. Patients that the user has access to (each patient has a home facility)

Deactivate

Clicking on the Deactivate action in the user grid will:

- Inactivate the user account (check the Inactive checkbox)
- Clear the 'Automatically include in Patient's Care Team (when added to a Referral).
- Clear the password
- Clear the permissions and facilities

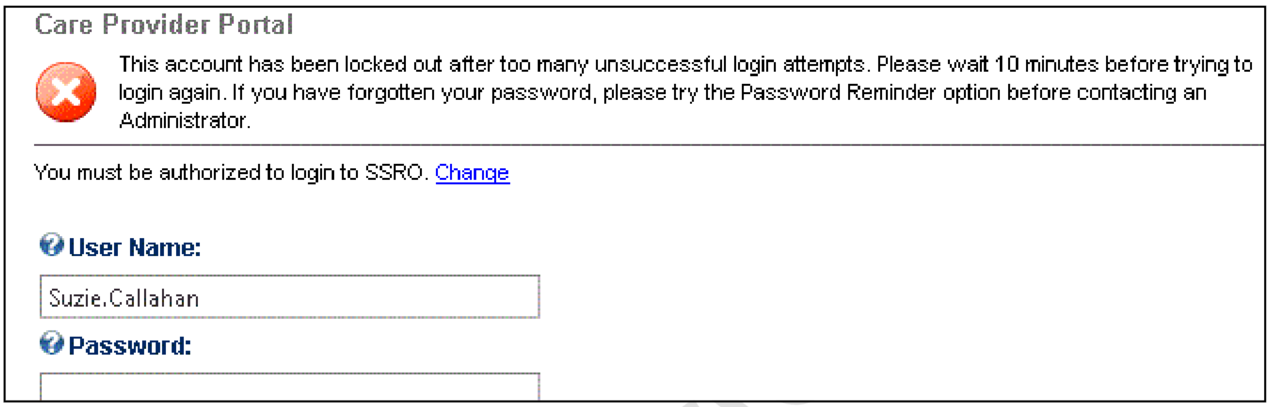
This ensures that the user cannot log into the Equicare system.

Clicking the Activate option for an inactive user will open the Profile tab. The Equicare Administrator needs to verify the user profile and account settings. The Equicare Administrator should deselect the “Inactive” checkbox and select the “Account Enabled” checkbox to activate the user.

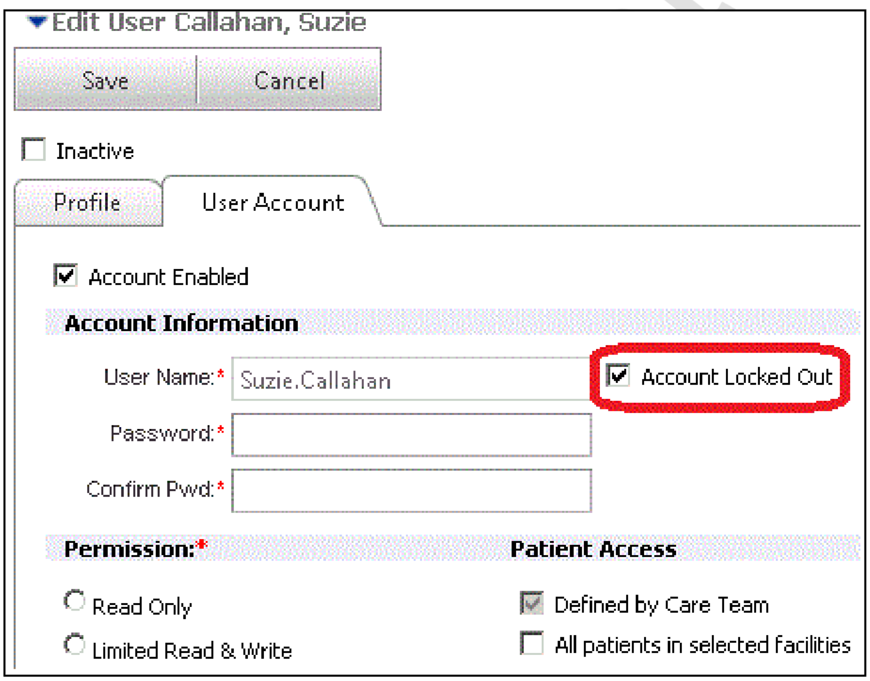
To see deactivated users, check the ‘Show Inactive?’ checkbox at the top right corner of the Manage Users grid.

Account Locked Out

When a user enters their user name and password incorrectly after 3 attempts, they will be locked out of their account for 10 minutes.



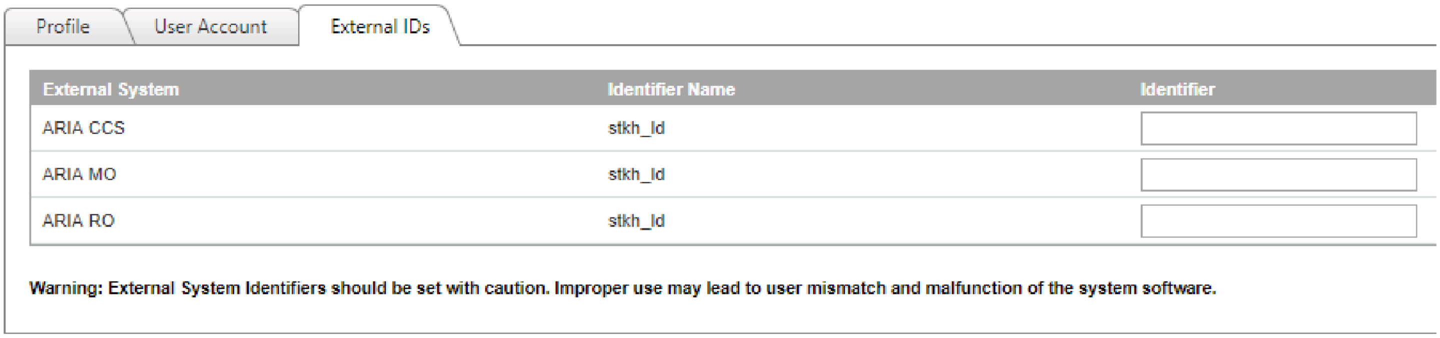
An Administrative user is able to unlock the users account by editing the user account in the Manage Users area.



To do this:
1. Click the Edit link at the right end of the row for the locked out user.
2. In the User Account tab, the ‘Account Locked Out’ checkbox will be checked. To unlock the account, the Administrative user should uncheck the box and save the change.

External IDs

The External IDs tab allows you to manage an EQUICARE user's unique identifiers to make sure they are correctly associated with the same user in an external system.



Note that incorrectly adding or changing a user's External ID can prevent the user information from synchronizing between EQUICARE and the external system, so should be done with extreme caution.

Workgroups

Workgroups can be created in Equicare to help segregate patients and care providers. These must be created by an Equicare Service technician.

Common configuration methods for Workgroups are:

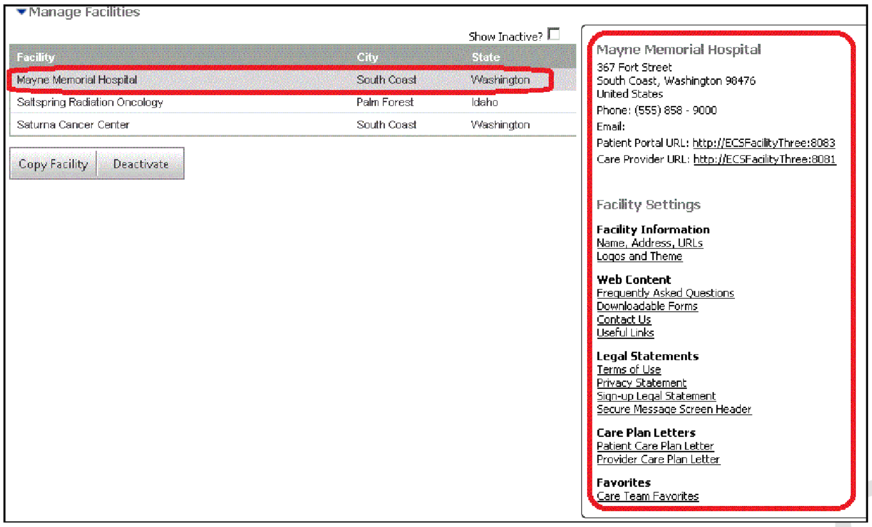
- Providing patient access to cancer registry staff: Cancer registry staff may want access to treatment information accumulated in Equicare. However, these professionals will not be members of the patients care team. Placing both the cancer registry users and patients in a ‘Cancer Registry’ workgroup would allow the cancer registry staff to access these patients.
- Grouping patients by clinical trial membership: setting up distinct workgroups for clinical trials allows further segregation of patients. Care providers assigned to a clinical trial workgroup would be able to find patients in that clinical trial without being a member of their care team.

Note: in order for the care team member to find the patient in the search function, the member must be assigned to the patient’s workgroup **or** be a member of his care team**.** In order for the patient to show up on the members My Alerts and My Patients worklist, the member must be part of the patient’s care team.

Manage Facilities

Our enterprise deployment model allows organizations to manage multiple facilities independently, while retaining the benefits of operating a single system across the enterprise. A number of settings can be configured independently for each facility, using the “Manage Facilities” screen.

Once the Equicare Administrator has logged in, the EQUICARE Amin tab will be available on the navigation bar. Go to EQUICARE Admin > Manage Facilities. In this screen, each facility is listed in the left panel. Selecting one of the existing facilities displays the information about the facility in the right panel. Information about the facility shown in the right panel is set in the Name, Address, URL's area of the Facility settings which are in the bottom section of the right panel.



An Equicare system will be installed with a default facility. The default settings can then be modified to create the customer facility.

To create a new facility in Equicare, select an existing facility and click the Copy Facility button. A new facility is created and all settings are copied except "Name" & "Favorites".

To remove a facility from Equicare, click the Deactivate button. There are 2 pre-requisites that must be met before a facility can be deactivated:

- All care providers must be deactivated or reassigned to other facilities. This must be done manually in the Manage Users screen.
- Patients assigned to the facility must be inactivated or reassigned to another facility. Features are included in Equicare to assist an administrator in doing this for all patients.

Names, Address, url

Several parameters for the facility are set in this screen.

Facility names that will be used throughout Equicare are listed here:

- Name: formal name for the institution. Shown in the Manage Facilities screen and on the login page of the patient portal.
- Short name: informal name for the institution. Shown in reports, facility dropdowns and the 'all facilities' landing page (for multifacility installations).
- Portal name: name given to the patient and care provider portals. Shown at the bottom of every care provider and patient screen.

The name and portal name are available for use as tokens in patient and care provider letters as well as patient notifications (for appointments, follow-ups, secure messages and questionnaires).

Time Zone

The time zone selected for the facility impacts the display of time throughout Equicare for both the care providers and patients assigned to the facility. When a care provider creates an appointment or schedules a follow-up, the time is represented in the time zone of the facility they are logged in to. When the time zone of an appointment is different from the time zone of the user's facility (defined by the facility they logged into) a time zone descriptor, such as PT, is appended.

Facility Address

The address information entered here is the main address for the facility. This information is available for use as tokens in patient and care provider letters as well as patient notifications.

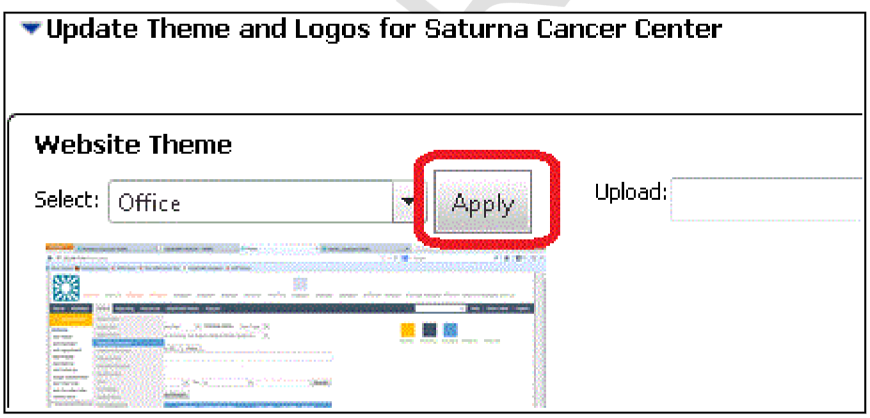
Portal URL's

The portal url list establishes the url's that can be assigned to the care provider or patient portals. Once the portal url's have been added, they are available to be assigned as the Care Provider url or the Patient Portal url. Note: The same url can be assigned to the Care Provider portal and the Patient portal. However, this arrangement may not allow access to users as the security set-up of the network servers may deny access.

<u>Logos and Theme</u>

Theme

In this section, the color theme for the Equicare environment can be set. Five standard color themes are available within the Equicare product. To change the color theme, select a theme from the dropdown. Selecting a color theme will update the thumbnail representation to show the user the colors theme. An Apply button is available to apply the color theme to the system.



The change to the theme will take place on the care provider portal immediately after logout. For the change to be seen on the patient portal, an IIS reset must be completed.

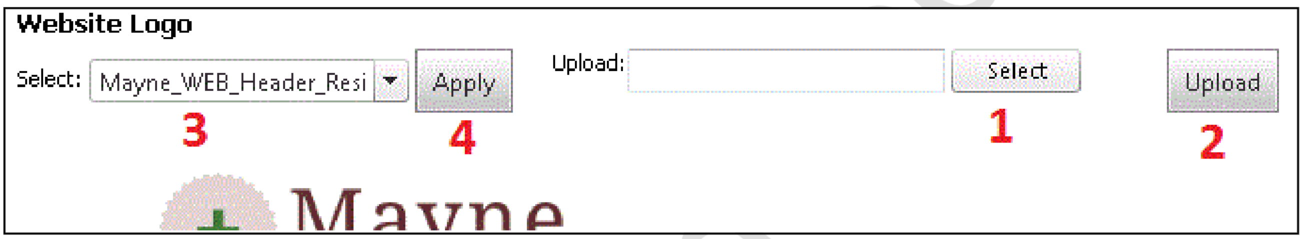
Note: The option to use a custom theme appears on this page, but it will no longer affect the Patient Portal. Custom themes have been discontinued as of the 4.7 release.

Logos

There are three logo's that will be used within Equicare. To prepare the logo for proper display within Equicare, size and resolution are indicated below. The logos are:

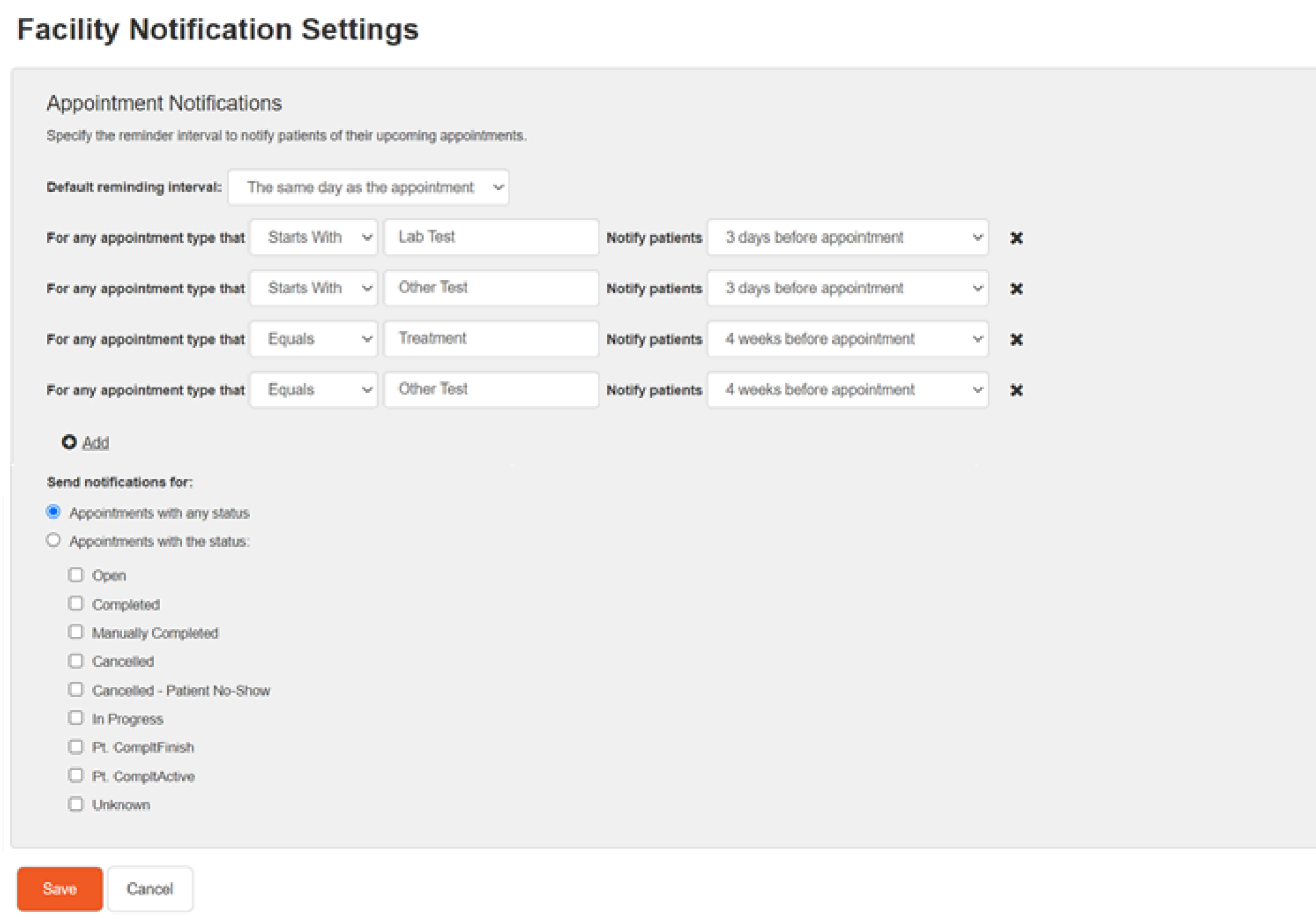
- Website logo: this logo is used at the top of the care provider and patient portal.
  - 16.51cm x 2.24cm, 6.5in x 0.88in, 96DPI
- Print Header logo: this logo is used for printed pages of the care plan such as the invitation and welcome letters.
  - 16.51cm x 2.24cm, 6.5in x 0.88in, 300DPI
- Cover Page logo: this logo is used for front page of the care plan.
  - 16.51cm x 10.16cm, 6.5in x 4in, 300DPI

In order to add a logo, select the logo (step 1, below) and upload it (step 2) to the ECS system. Once uploaded, select the logo from the dropdown (step 3). An Apply button will appear and allow the user to apply the logo to the Equicare environment (step 4).



<u>Notification Settings</u>

In the Notification Settings page, set the default nofitication intervals and create rules for when to notify patients about their appointments. How notifications are sent for each patient (email and/or text message) can be configured on the *Patient User Account* page.



Appointment notifications will inform the patient about scheduled appointments.

1. Select the default interval at which Appointment Notifications should be sent to patients. To disable Appointment Notifications by default for this facility, choose *Never*, which means that no appointment notifications will be sent, unless specified in a rule (see below).
2. (Optional) To add a rule that defines when notifications should be sent for a specific Appointment Type, click **Add**.
    1. Choose how the Appointment Type will be matched to this rule: *Contains*, *Starts With*, or *Equals*.
    2. Enter the Appointment Type to use for this rule. You can either type text manually or select from the list of Appointment Types available in the system.
    3. Select the interval at which notifications should be sent for appointments that match this rule.

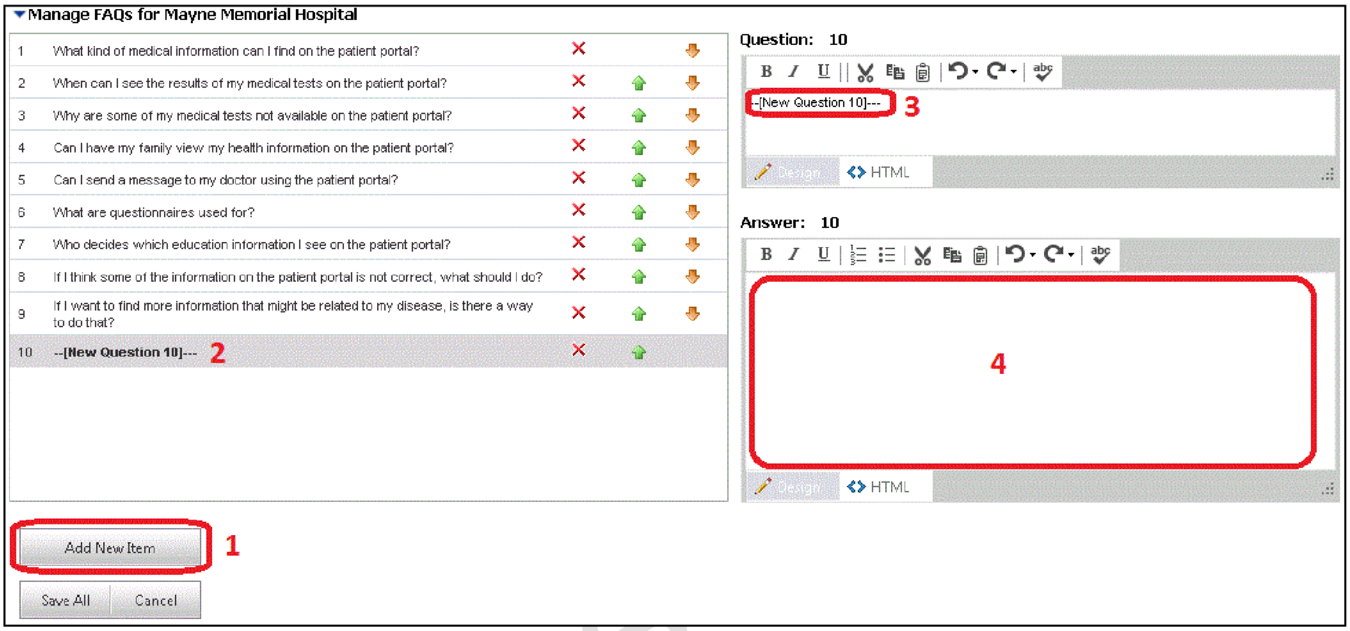
    These rules operate in addition to the default interval, even when the default is set to *Never*. This means that by using notification rules, you can not only send notifications at varying intervals (e.g. 1 week before the appointment for some, 3 weeks before for others), you can also decide to only send notifications for specific types of appointments. You can add as many rules as needed.

3. Select the appointment status for which notifications should be sent:
    1. **Appointments with any status:** Notifications will be sent for appointments of any status.
    2. **Appointments with the status:** Select the appointment statuses for which notifications should be sent.
4. Click **Save**.

FAQ's

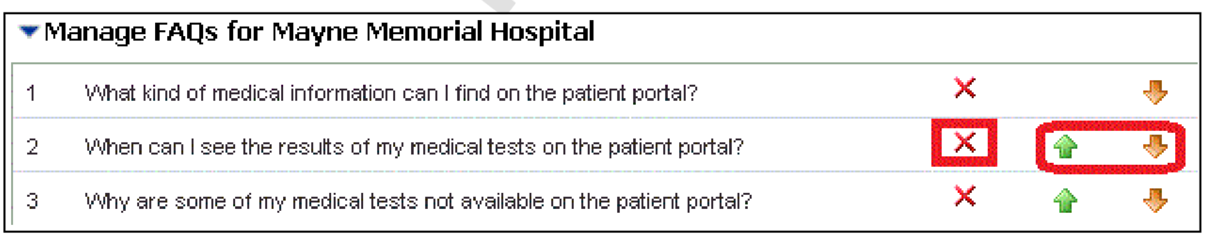
FAQ's appear under the Resource menu item. The FAQ's are visible to care providers and patients. An administrator can add, delete, and rearrange the FAQ items which provide information to patients.

In order to add a new FAQ question and answer, click Add New Item (step 1, below). A new blank item will appear in the list (step 2). Enter the content for the question (step 3) and the answer (step 4). To add more items, start again by clicking the Add New Item button.



Items can be edited by clicking on the item. The question and answer will appear in their respective boxes. Make changes as necessary.

FAQ items can be rearranged in the list using the up and down arrow icons. FAQ items can be deleted using the delete icon.

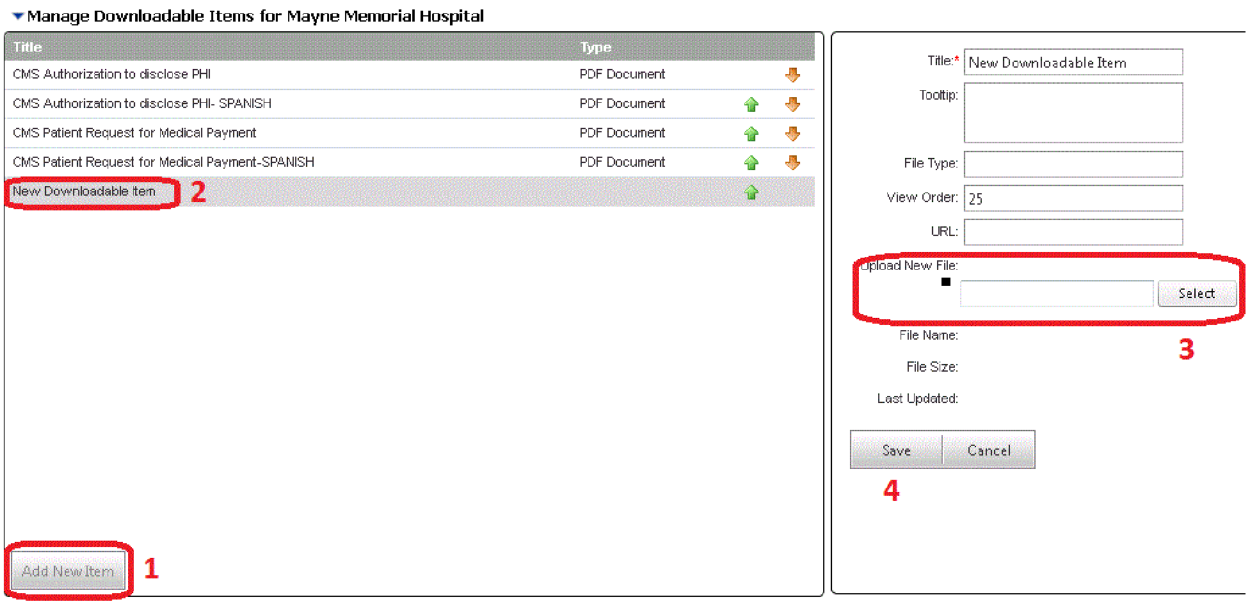


Click the 'Save All' button when all items have been entered. This will save all the items that have been added, edited, deleted or rearranged.

Download Forms

Download Forms appear under the Resource menu item. The Download Forms are visible to care providers and patients. An administrator can add, delete, and rearrange the Download Form items.

In order to add a new Download Form, click Add New Item (step 1, below). A new blank item will appear in the list (step 2). Select the file to be uploaded (step 3). Enter the title that will be displayed for the item. A tooltip to provide more information about the form can also be added. This will be displayed when a user hovers over the form. Once complete, click the ‘Save’ button (step 4) to save the item. To add more items, start again by clicking the ‘Add New Item’ button.



Items can be edited by clicking on the item. The information associated with the form (including the file name) will appear in their respective boxes. Make changes as necessary.

Download Forms items can be rearranged in the list using the up and down arrow icons, and can be deleted using the delete button which is available for a saved item.

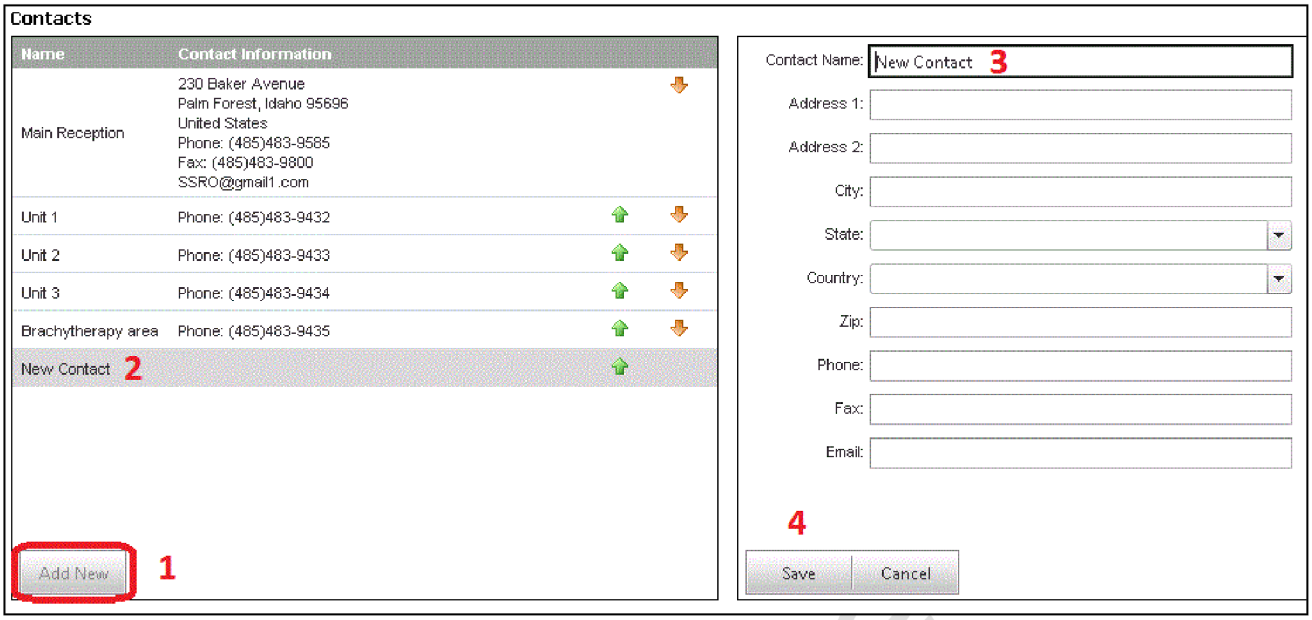
Contact Us Header and Info

Contact information can be put into the Contact Us area of the portal. This information is available from the Contact Us menu item. The Contact Us is visible to care providers and patients.

Use the **Contact Us Header** option to enter the text that will appear at the top of the Contact Us page.

Use the **Contact Us Info** option to enable/disable the Contact Us page and enter contact information.

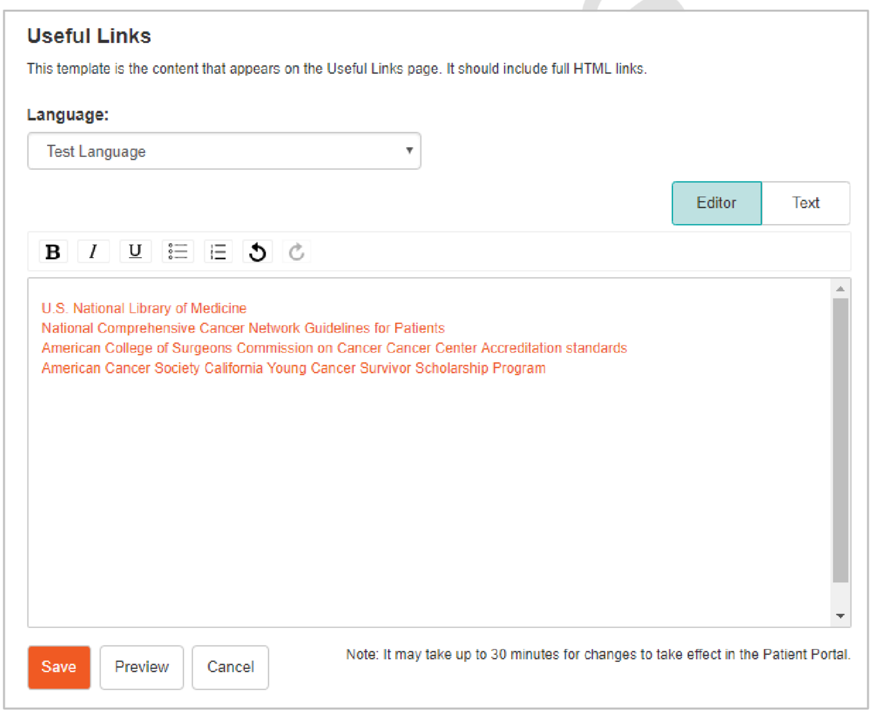
In order to add an item to Contact Us, click the 'Add New' button (step 1, below). A new blank item will appear in the list (step 2). Select the file to be uploaded (step 3). Add the contact information as appropriate. Once complete, click the 'Save' button (step 4) to save the item. To add more items, start again by clicking the 'Add New' button.



Items can be edited by clicking on the item. The information associated with the contact will appear in their respective boxes. Make changes as necessary. Click the 'Save' button to save changes. Contact items can be rearranged in the list using the up and down arrow icons, and can be deleted using the delete button which is available for a saved item.

Useful Links

Useful Links appear under the Resource menu item. The Useful Links are visible to care providers and patients. An administrator can add and delete Useful Link items. Links must be inserted using proper HTML hyperlink formatting.



Click the **Save** button to save changes.

Terms of Use

The Terms of Use link is available at the bottom of every screen of the patient and care provider portal. The Terms of Use screen is displayed to any user when the Terms of Use link is clicked.

The Terms of Use screen is also displayed to care providers the first time they sign in to the care provider portal and patients/authorized representatives when they complete the sign-up process for the patient portal.

Each user must agree to the Terms of Use before using the portal.

To create the Terms of Use, enter the text in the box in this screen and click the 'Save' button to save.

If copying the text from a word document, it is recommended to paste the text into wordpad first to remove word tags that may affect the formatting of the text.

Privacy Statement

The Privacy Statement link is available at the bottom of every screen of the patient and care provider portal. The Privacy Statement screen is displayed to any user when the Privacy Statement link is clicked.

To create the Privacy statement, enter the text in the box in this screen and click the 'Save' button to save.

If copying the text from a word document, it is recommended to paste the text into wordpad first to remove word tags that may affect the formatting of the text.

Sign-up Legal

The Sign-up Legal statement is presented to care providers and patients when creating accounts for authorized representatives. These accounts can be created by a care provider on behalf of the patient or by a patient themselves. Authorized Representatives are able to access all the patient information available on the portal. They are also able to act on behalf of the patient using the portal account to send secure messages, complete questionnaires or any of the other activities available on the portal.

The Sign-Up Legal statement is designed to provide a statement which outlines the obligations and conditions that occur when granting access to personal health information. The care provider or patient must agree to the Sign-Up Legal statement before they can create an Authorized Representative account.

To create the Sign-up Legal statement, enter the text in the box and click the Save button to save.

If copying the text from a word document, it is recommended to paste the text into wordpad first to remove word tags that may affect the formatting of the text.

Secure Message Screen Header

The Secure Message screen header is designed to provide a statement to patients which outlines information about sending a secure message. This may be information about the appropriateness of sending a secure message or the expectations for a reply to the message.

The Secure Message screen header is displayed at the top of every secure message sent by a patient.

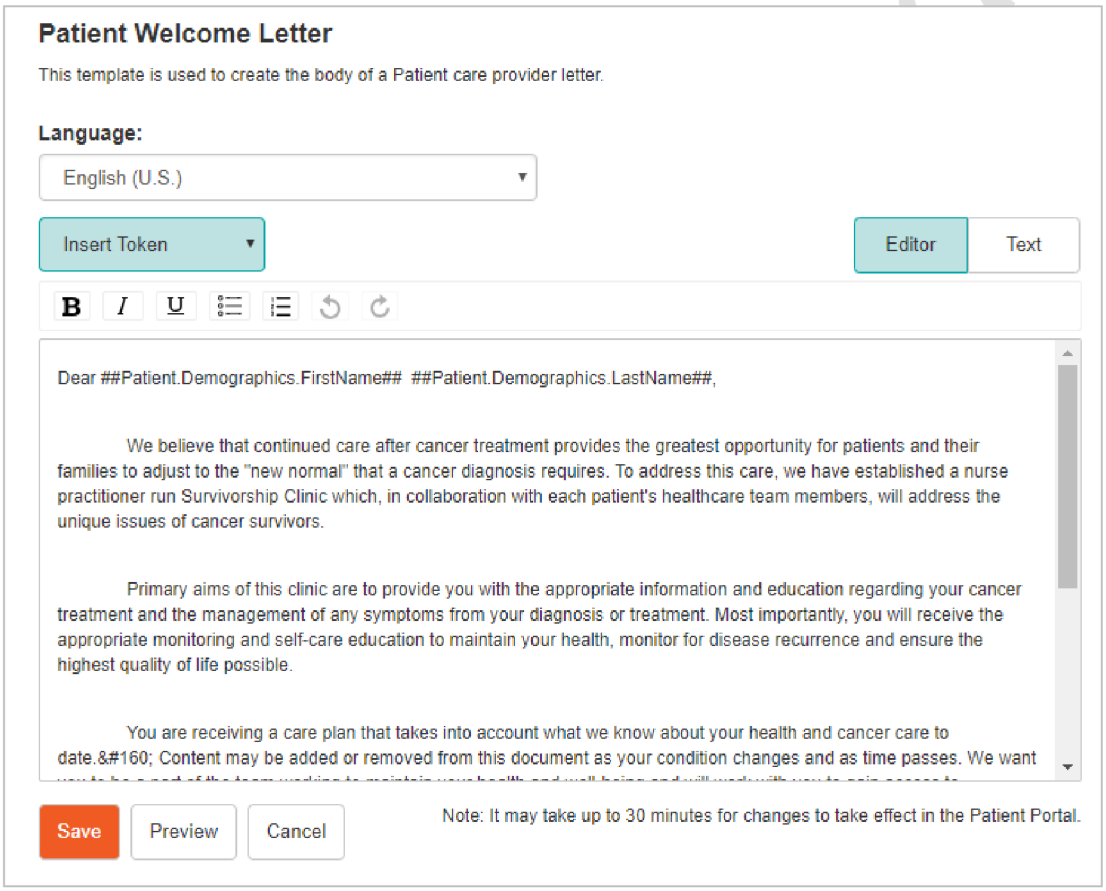
To create the Secure Message Screen header, enter the text in the box in this screen and click the 'Save' button to save.

If copying the text from a word document, it is recommended to paste the text into wordpad first to remove word tags that may affect the formatting of the text.

Patent Care Plan Letter

The Patient Care Plan letter provides the opportunity for the care provider to provide some information to the patient about the care plan. This letter is available as part of the patient care plan. It can be accessed under the Patient menu, in the Care Plan Printing area. It is labeled as "Welcome Letter" in that area.

The Patient Care Plan letter can be populated with specific pieces of information using tokens. For example, using the token for the patient's care coordinator in the letter will result in the name of the specific care coordinator being added to the letter. This allows a personalized letter to be created for each patient.



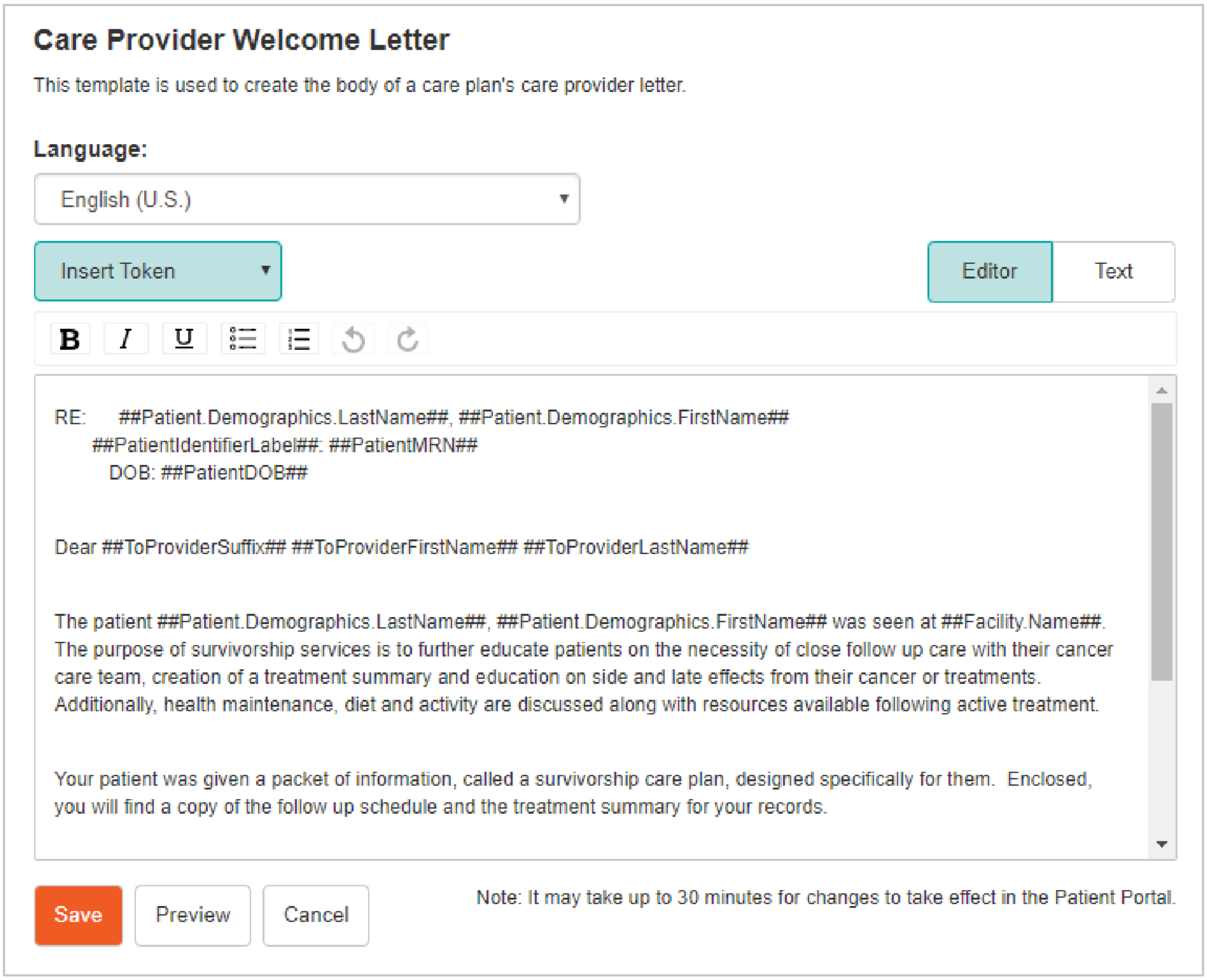
To create a Patient Care Plan letter, type the text into the box available in this screen. Add tokens as needed. To add a token, use the cursor to indicate the location for the token then select the token from the Insert Token menu. To see a preview of what a personalized letter will look like, click the **Preview** button.

To save the letter for use within the system, click the **Save** button.

Provider Care Plan Letter

The Provider Care Plan letter provides the opportunity for an Equicare care provider to provide some information to another care provider about the care plan. This letter is available as part of the provider care plan. It can be accessed under the Patient menu, in the Care Plan Printing area. It is labeled as "Provider Letter" in that area.

The Provider Care Plan letter can be populated with specific pieces of information using tokens. For example, using the token for the patients care coordinator in the letter will result in the name of the specific care coordinator being added to the letter. This allows a personalized letter to be created for each care provider.



Additionally, the Provider Care Plan can be edited at the time of creation (in the Care Plan Printing area). This allows additional flexibility in personalizing the letter to the care provider.

To create a Provider Care Plan letter, type the text into the box available in this screen. Add tokens as needed. To add a token, use the cursor to indicate the location for the token then select the token from the Insert Token menu.

To see a preview of what a personalized letter will look like, click the **Preview** button. To save the letter for use within the system, click the **Save** button.

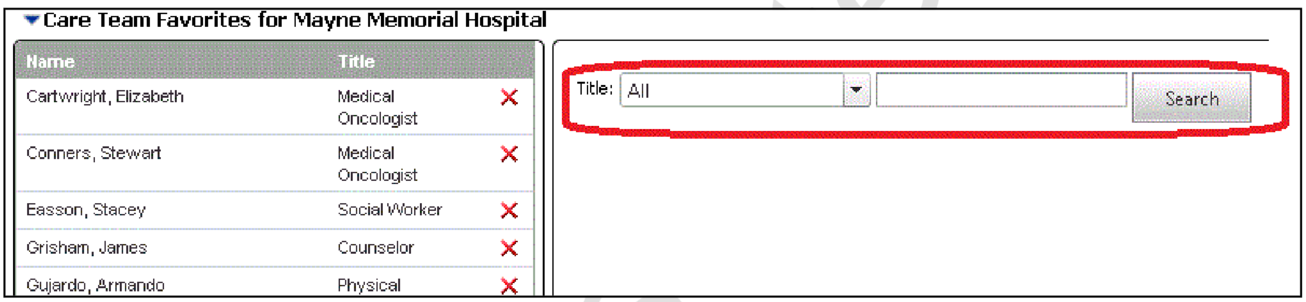
Care Team Favorites

The Care Team Favorites can be selected by a care provider who is adding a care team for a patient. This is done as part of the Patient Activation Wizard (PAW) or in the Care Management screen (under the Patient menu).

Care providers listed in the Care Team Favorites are available when the user clicks the Add Members button. One or many care providers from the Care Team Favorites can be added to the patients care team.

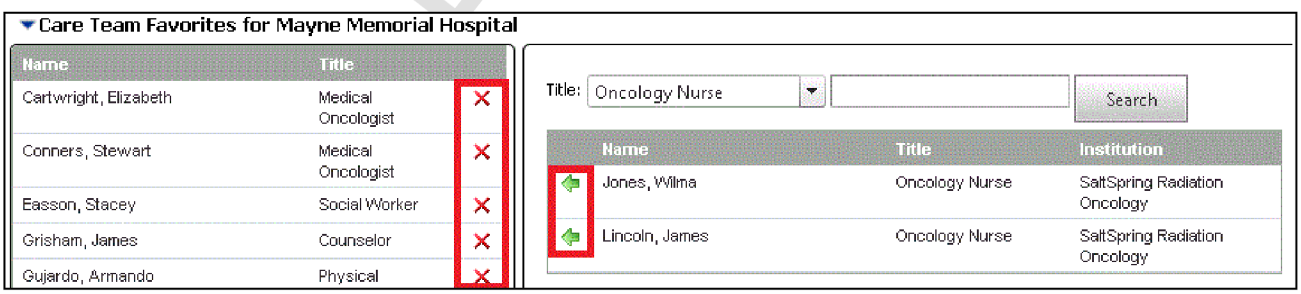
To create a Care Team Favorites list for a facility, search for a care provider by title or name. Care providers that meet the search criteria are displayed. Note that:

- All care providers in the system can be found through this search. This enables care team members from outside of the facility or who are not affiliated with the facility to be added to the Care Team Favorites.
- If a care provider is not found through the search, they may already be included in the Care Team Favorites for that facility. The message 'No Care Providers found' is shown if a care team member is already part of the Care Team Favorites.



Once a care provider has been found, add them to the care team favorites using the green arrow. The care provider moves from the right column to the left column.

To delete a care provider from the Care Team Favorites, click the red 'X' to the right of the care provider.



Once all the care providers have been added to the Care Team Favorites, click the 'Save' button to save changes.

Manage Institutions

This administrative area allows the Equicare Administrator to add institutions to the Equicare system. These institutions can be used as referral sources or can be used to populate information for Care Providers.

Note that Institutions are not the same as Facilities. Institutions are more similar to care providers. Facilities are entities within Equicare that control logos and templates.

Manage User Synchronization

The Manage User Synchronization page allows the users with the appropriate permission to view and act on a listing of Care Providers who have been added or deactivated in an external system.

Through a daily check, Equicare ensures its Care Providers directory automatically remains in synch with all Care Providers directories in External Systems it is connected to. During this daily process, all changes detected in any External System's Care Providers directory (such as addition of new Care Providers, changes in existing Care Providers records, etc …) are automatically propagated into the Equicare Care Providers directory.

In some cases, the detected changes require a decision or a confirmation before being applied to the Equicare Care Providers directory. From this page, you are able to:

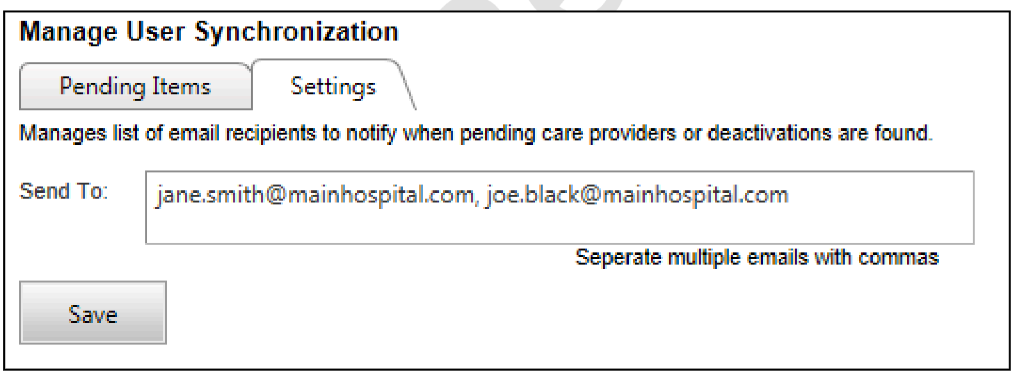
- Define your notification recipients
- Resolve conflicts on pending items

Settings

In the event of conflicts or uncertainties during the daily automatic synchronization process, the application can send emails to notify the appropriate individuals that some Care Provider records require attention.

The Settings tab allows you to specify the email addresses of all recipients to be informed of pending items.

1. Select "Manage User Synchronization" from the 'EQUICARE Admin' menu.
2. Select the "Settings" tab.
3. Enter the email addresses of the individuals who wish to be notified. Use commas to separate multiple email addresses.
4. Select "Save" to complete.



Example of a notification email sent by the application:

Subject : Care Provider sync report - 5/15/2014 3:45 PM

Body : The following care providers, found in an external system, need your attention in Equicare.

External System: ARIA RO

Potential match for "Bonnie Fisher"
Potential match for "Hope Perez"

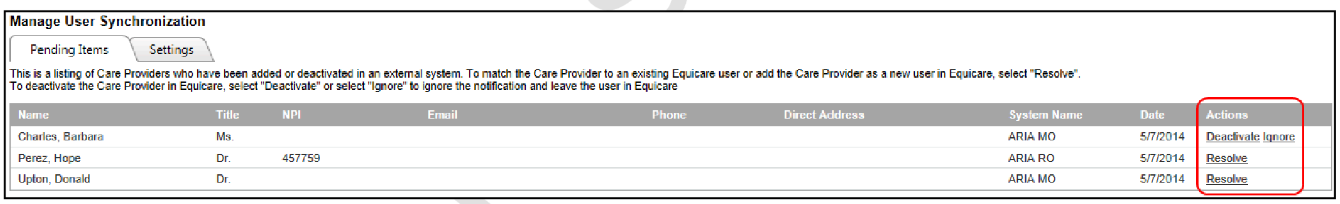
If multiple items are found pending on a given daily check, only one email will be sent to each recipient, including a list of all the pending records. Also, the system will not send any reminder about potential pending records not being taken care of.

Pending Items

In the event of conflicts or uncertainties during the daily automatic synchronization process, the application will automatically place the items in a pending list, so that the users with the appropriate permission can resolve the conflicts.

The 'Pending Items' tab allows you to:

- Resolve deactivations
- Resolve conflicts in between records


Manage User Synchronization

Pending Items | Settings

This is a listing of Care Providers who have been added or deactivated in an external system. To match the Care Provider to an existing Equicare user or add the Care Provider as a new user in Equicare, select "Resolve".
To deactivate the Care Provider in Equicare, select "Deactivate" or select "Ignore" to ignore the notification and leave the user in Equicare

Name	Title	NPI	Email	Phone	Direct Address	System Name	Date	Actions
Charles, Barbara	Ms.					ARIA MO	5/7/2014	Deactivate Ignore
Perez, Hope	Dr.	457759				ARIA RO	5/7/2014	Resolve
Upton, Donald	Dr.					ARIA MO	5/7/2014	Resolve

Resolving Deactivations - When a Care Provider is deactivated in an External System, a user needs to decide whether this Care Provider should also be deactivated in the Equicare system or not.

1. Select "Manage User Synchronization" from the Equicare Admin menu.
2. Select the "Pending Items" tab.
3. Select the desired action beside the appropriate record :
   a. Select "Deactivate" to deactivate this Care Provider in the Equicare Care Provider directory
   b. Select "Ignore" to keep this Care Provider active in the Equicare Care Provider directory

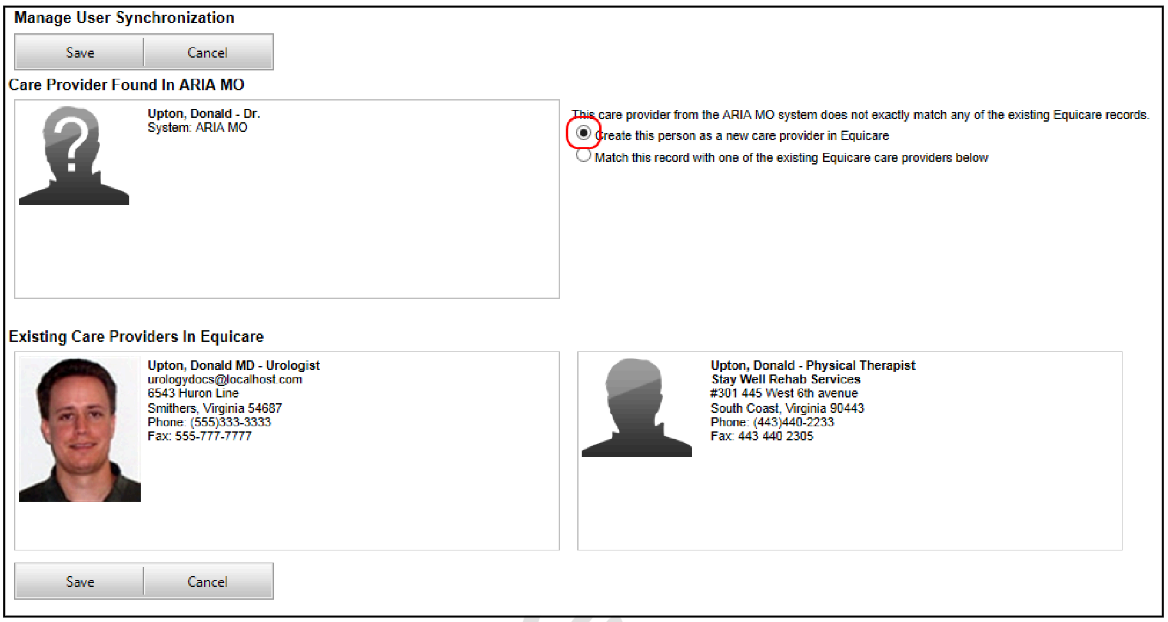
Resolving Conflicts - When a new Care Provider is created in an External System, the application will look for the same Care Provider in the Equicare Care Provider directory.

If the same person is found, the records are matched and the Equicare Care Provider directory is automatically updated with the new data found in the External System.

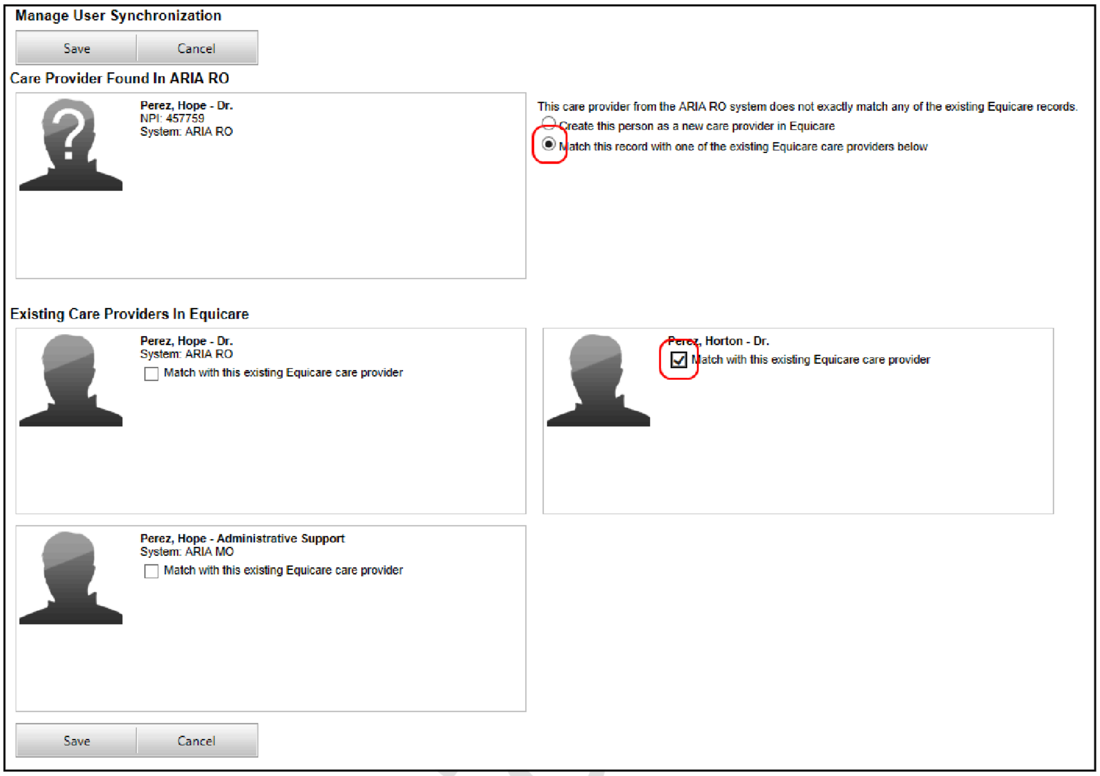
If this person does not exist, a new record is automatically created for this Care Provider in the Equicare Care Provider directory.

In the event of possible but uncertain identity match in between the two systems, a user needs to resolve the case.

1. Select "Manage User Synchronization" from the Equicare Admin menu.
2. Select the "Pending Items" tab.
3. Select "Resolve" beside the appropriate record. The resolution screen will display.
    a. If none of the suggested existing records in Equicare match the identity of the newly created Care Provider in the External System, select "Create this person as a new care provider in Equicare".



    b. If one of the suggested existing records in EQUICARE match the identity of the newly created Care Provider in the External System :
        I. Select "Match this record with one of the existing Equicare care providers below"
        II. Select "Match with this existing Equicare care provider" inside the desired Care Provider card



c. Select “Save” to complete.

Import Users and Institutions

This administrative area allows the Equicare Administrator to import a list of users and institutions to the system. This could be used to import a list of care providers or PCP’s to the Equicare system. The import file must be in CSV format. See **Appendix B**. Photo’s for care team members can also be imported here.

Lesson 2: Other Equicare Administrator Tasks

In the Equicare Admin tab, there are some other options available for the Administrator to manage the configurable items in the Equicare system.

Manage Languages

On the EQUICARE Admin > Manage Languages page, the languages available on the Patient Portal can be selected along with the font size and type used in printed materials.

Code	Language	Display Name	Font Name	Font Size		
en-US	English (U.S.)	English (U.S.)	Arial	- 12 +	On Off	Default Language
es-MX	Spanish	Español	Arial	- 12 +	On Off	Set as Default
en-AU	English (Aus.)	English (Aus.)	Arial	- 12 +	On Off	Set as Default
en-CA	English (Canada)	English (Canada)	Arial	- 12 +	On Off	Set as Default
en-GB	English (G.B.)	English (G.B.)	Arial	- 12 +	On Off	Set as Default
fr-CA	French (Canada)	Français (Canada)	Arial	- 12 +	On Off	Set as Default
zh-CN	Chinese (Simplified)	普通话	SimHei	- 16 +	On Off	Set as Default
pt-BR	Portuguese (Brazil)	Português (Brasil)	Arial	- 12 +	On Off	Set as Default
fo-FO	Test Language	Test Language	Arial	- 12 +	On Off	Set as Default

Save Cancel

For each language in the system, the below is displayed:

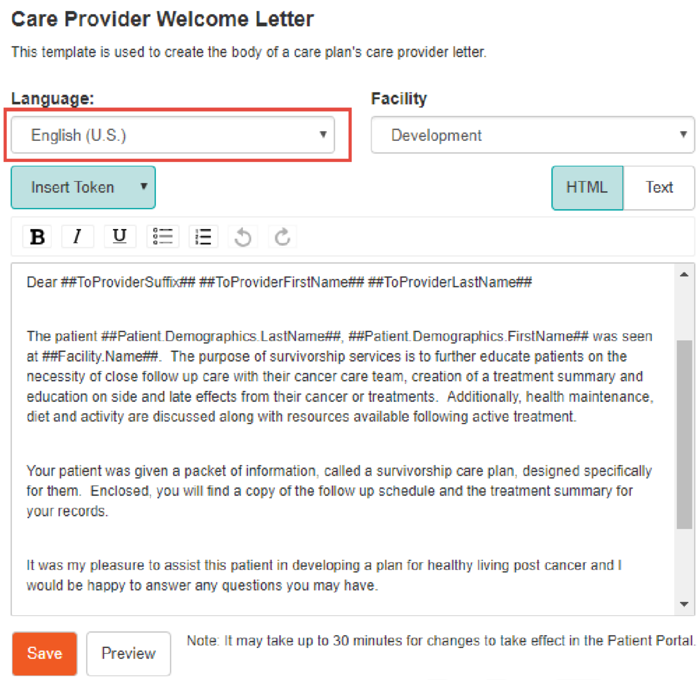
- **Code:** The language code specified in ISO 639-1, provided for reference only.
- **Language:** The internal name of the language, displayed in the language of the Care Provider Portal.
- **Display Name:** The name of the language, displayed in that language. This is seen on the Patient Portal in the language selection menu.
- **Font Name:** The name of the font used when generating printed materials in this language. The font can be changed, but the name must exactly match a font installed on the system server.
- **Font Size:** The size of the font used when generating printed materials.
- **On/Off toggle:** If set to *On*, the language is available to all users of the Patient Portal.
- **Default Language:** In the unlikely event that there is an issue retreiving text in a specified language, the default language will be used instead.

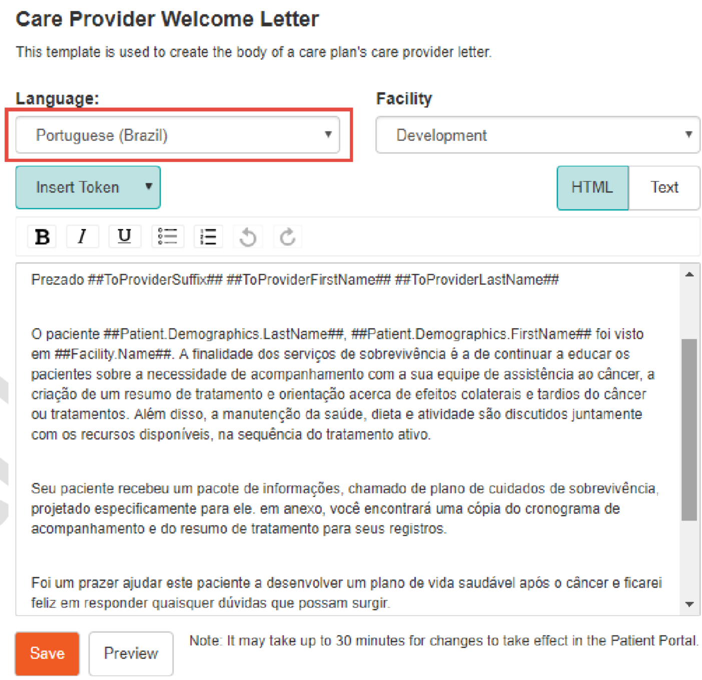
Important: If a language is enabled, it is available to all users of the Patient Portal. If a user selects that language, all localized content will be provided to the user in that language. Before making a language available to patients, be sure that any required customizations are made to the text for that language by using the template editor on the Manage Templates page.

Manage Templates

On the **EQUICARE Admin > Manage Templates** page, you can modify the text of templates in each enabled language. If a template is facility-specific, it can also be edited in each language *for each facility*.

The system comes with preloaded with text for every template, and you have the option of editing it and creating a customized version. Customizing the text creates a copy, so you can always revert to the default text if you need to.





Using the editor is straightforward: Select the template, select the language (and possibly the facility), edit, and then save. Below is a description of the other features.

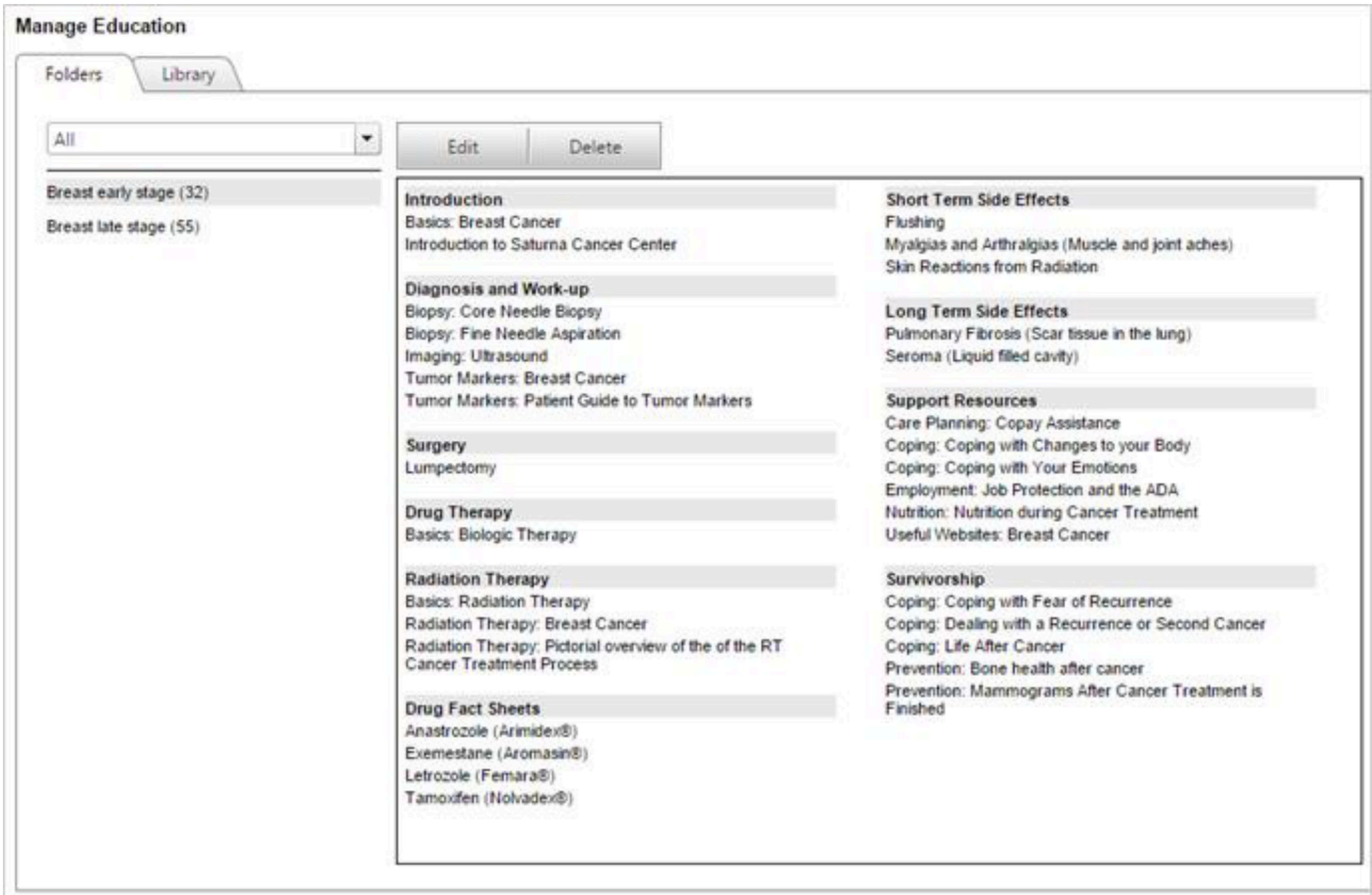
- A language dropdown is always available to select the language of the template you'd like to edit.
- If a template is facility-specific, a dropdown is available to select the facility for which you wish to edit the template.
- If a template supports HTML, the editor will provide a toggle to edit the template in either an Editor (which renders HTML formatting) or plain text. Otherwise, only plain text is available.
- If tokens are supported for the template, a dropdown is available to select a token, which will be inserted in the text where the cursor is located. Only the tokens supported by the template are available in the list.
- When viewing a customized template, you can revert to the default text by clicking the "Reset to Default" link below the editor.

Managing the Education Library

EQUICARE Administrators can manage the Education Library by going to the *EQUICARE Admin* menu and clicking **Manage Education**.

Folders

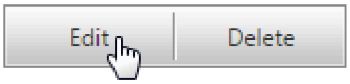
Folders allow you to group articles together to best meet your specific needs, such as gathering the most commonly assigned articles in one place, organizing your custom local content, or collecting a series of articles for a specific stage of treatment. On the *Manage Education* page, the *Folders* tab provides options to manage library folders.



Each folder must be associated with one Disease Site. When viewing the *Folders* tab, existing folders will be listed on the left. Clicking a folder will show any articles already associated with it.

Editing Folders

To edit folder, click **Edit**.



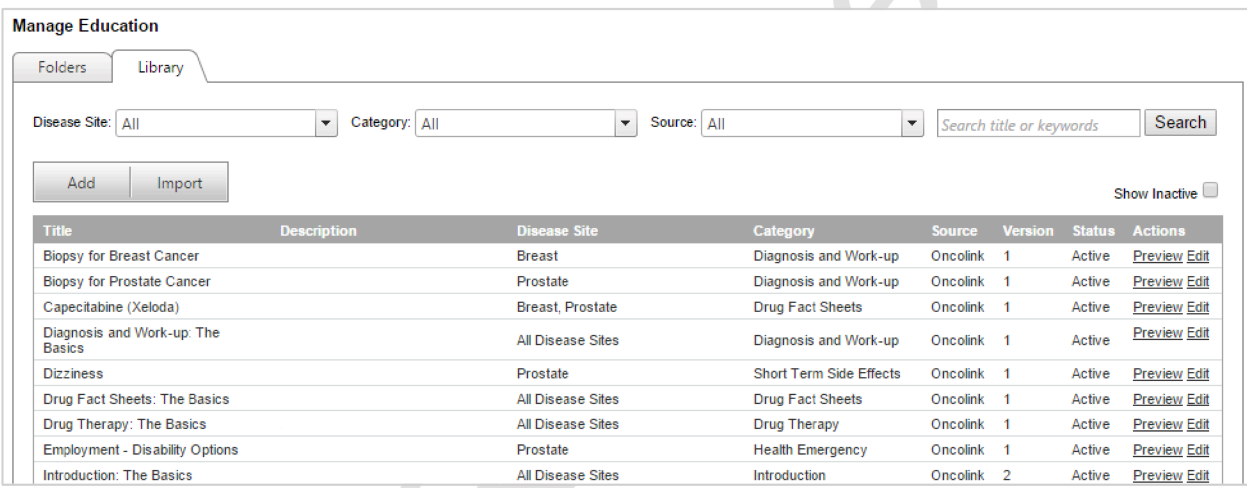
You can change the folder name, change the sort order, and change the disease site the folder is associated with.

> **Important:** Active Patient Portal customers can only have one folder per Disease Site.

To associate articles with the folder, select the category that contains the desired articles and place a check next to the articles to add. You can add articles from multiple categories and even from different disease sites. When finished, click **Save**.

<u>Library Articles</u>

Click the *Library* tab to view a list of all the articles in the Education Library, sorted alphabetically by title. In addition to the title, the list also shows the article Description, Disease Site, Category, Source, Version, and Status.



Title	Description	Disease Site	Category	Source	Version	Status	Actions
Biopsy for Breast Cancer		Breast	Diagnosis and Work-up	Oncolink	1	Active	Preview Edit
Biopsy for Prostate Cancer		Prostate	Diagnosis and Work-up	Oncolink	1	Active	Preview Edit
Capecitabine (Xeloda)		Breast, Prostate	Drug Fact Sheets	Oncolink	1	Active	Preview Edit
Diagnosis and Work-up: The Basics		All Disease Sites	Diagnosis and Work-up	Oncolink	1	Active	Preview Edit
Dizziness		Prostate	Short Term Side Effects	Oncolink	1	Active	Preview Edit
Drug Fact Sheets: The Basics		All Disease Sites	Drug Fact Sheets	Oncolink	1	Active	Preview Edit
Drug Therapy: The Basics		All Disease Sites	Drug Therapy	Oncolink	1	Active	Preview Edit
Employment - Disability Options		Prostate	Health Emergency	Oncolink	1	Active	Preview Edit
Introduction: The Basics		All Disease Sites	Introduction	Oncolink	2	Active	Preview Edit

> **Tip:** By default, the list only shows active articles. To also view inactive articles, place a check in the box next to *Show Inactive*.

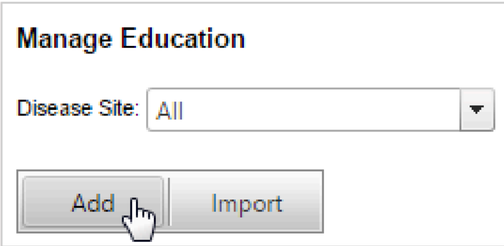
The article list can be filtered by using the three pull-down filters at the top: *Disease Site*, *Category*, and *Source*. You can also search for articles by entering search words or expressions (separated by a comma) in to the search field.

To view the contents of an article, click its **Preview** link. The article will open as a PDF in a separate tab or window (depending on the browser settings).

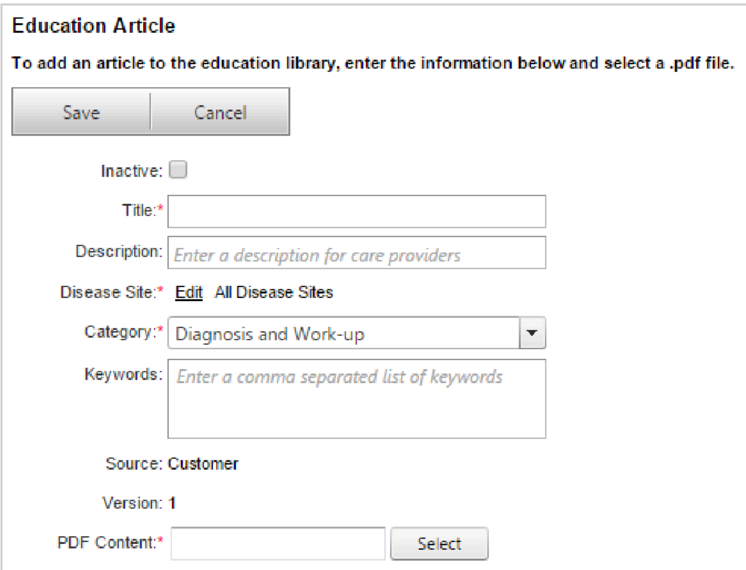
Adding an Article to the Library

To add a new article to the library from a PDF file:

1. Click **Add** button.



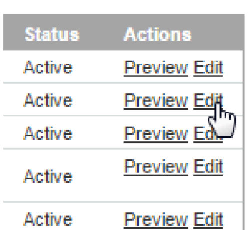
2. In the *Title* field, enter the title of the article as you'd like it to appear in the library.



3. In the *Description* field, you have the option of entering a short description of the article. Note that there is a limit of 2000 characters.
4. By default, the article is associated with all disease sites. To select specific disease sites, click the **Edit** link, place a check next to the desired site(s), and click **OK**.
5. Use the *Category* pull-down list to select a category for this article.
6. To add the PDF file, click the **Select** button, locate and select the file, and click **Open**.
7. Click **Save**.

Editing Article Attributes

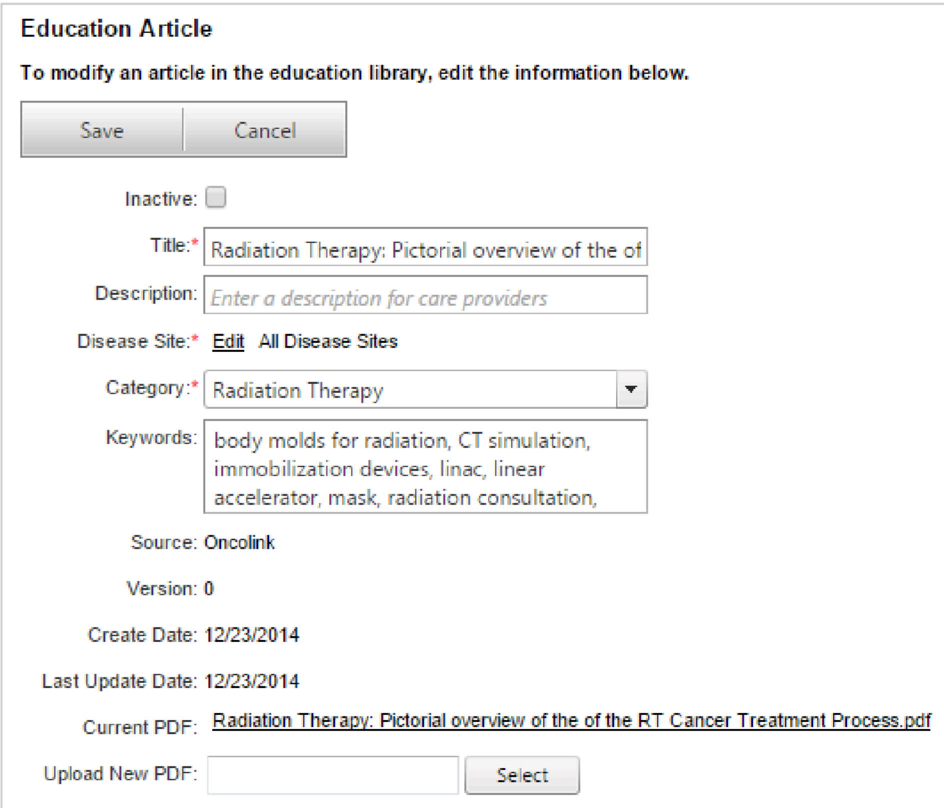
Only articles that have been added by an EQUICARE Administrator can be edited. Articles that have a Source of *OncoLink* cannot be edited, but they can be deactivated. To edit article attributes, click the **Edit** link.



Article Attributes define how an article is identified in EQUICARE, including how it is organized within the Education Library. Each article has the following attributes:

- Status (Active / Inactive)
- Title
- Description
- Disease Site

- Category
- Keywords
- Source (Read Only)
- Version (Read Only)
- Created date (Read Only)
- Last update date (Read Only)



Attributes that are not Read Only can be changed. To change the PDF file for this Article, click the **Select** button and select a different file. To view the contents of the current PDF, click its filename.

These Read Only attributes cannot be edited:

- The *Source* information identifies where the article originated, such as OncoLink or a local PDF.
- The *Version* will automatically increment if an updated edition of an article is added.
- The *Created date* indicates when the article was originally added to EQUICARE.
- The *Last update date* indicates the last time the article or article attributes were updated.

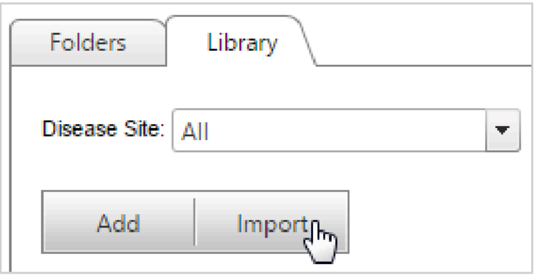
When finished making changes, click **Save**.

Importing a Library

An EQUICARE Administrator can import a set of articles using the Import feature. The Import feature requires a specially prepared import package, which would typically be provided by an Equicare Health representative.

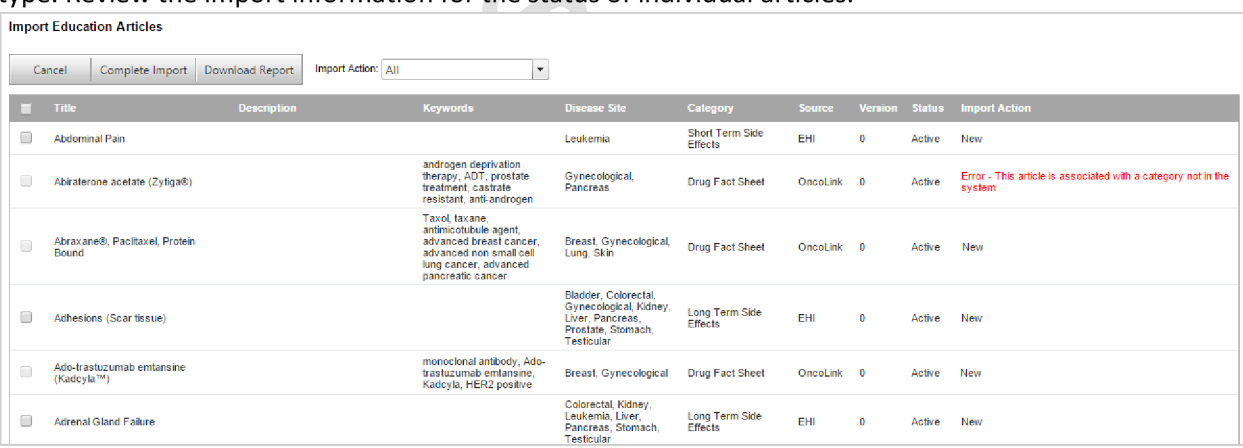
To import a set of articles from an import package:

1. On the *Library* tab, click **Import**.



2. Click **Select**. Locate and select the import package ZIP file, then click **Open**.
3. Click **Preview**.

4. The import process provides information about what is being imported into the system. This can include articles which are new to the system, articles that are being updated, or articles that cannot be imported into the system for some reason. You can use the *Import Action* filter to display articles with a specific import action type. Review the import information for the status of individual articles.



Import Education Articles

Cancel | Complete Import | Download Report | Import Action: All

	Title	Description	Keywords	Disease Site	Category	Source	Version	Status	Import Action
	Abdominal Pain			Leukemia	Short Term Side Effects	EHI	0	Active	New
	Abiraterone acetate (Zytiga®)		androgen deprivation therapy, ADT, prostate treatment, castrate resistant, anti-androgen	Gynecological, Pancreas	Drug Fact Sheet	OncoLink	0	Active	Error - This article is associated with a category not in the system
	Abraxane®, Paclitaxel, Protein Bound		Taxol, taxane, antimicotubule agent, advanced breast cancer, advanced non small cell lung cancer, advanced pancreatic cancer	Breast, Gynecological, Lung, Skin	Drug Fact Sheet	OncoLink	0	Active	New
	Adhesions (Scar tissue)			Bladder, Colorectal, Gynecological, Kidney, Liver, Pancreas, Prostate, Stomach, Testicular	Long Term Side Effects	EHI	0	Active	New
	Ado-trastuzumab emtansine (Kadcyla™)		monoclonal antibody, Ado-trastuzumab emtansine, Kadcyla, HER2 positive	Breast, Gynecological	Drug Fact Sheet	OncoLink	0	Active	New
	Adrenal Gland Failure			Colorectal, Kidney, Leukemia, Liver, Pancreas, Stomach, Testicular	Long Term Side Effects	EHI	0	Active	New

The following potential issues are possible:

- A disease site is associated with an article and that disease site does not exist in the system.
- An article is associated with a category which does not exist in the system.
- An article is an older version than the one that already exists in the system.
- An article is associated with an Equicare product which does not match the system.

5. Place a check in the box next to each article to import. An article with an error that prevents that article from being imported cannot be selected. If you would like to save a report of the import summary and any error messages, click **Download Report**.
6. Click **Complete Import** to add the selected articles to the Education Library.

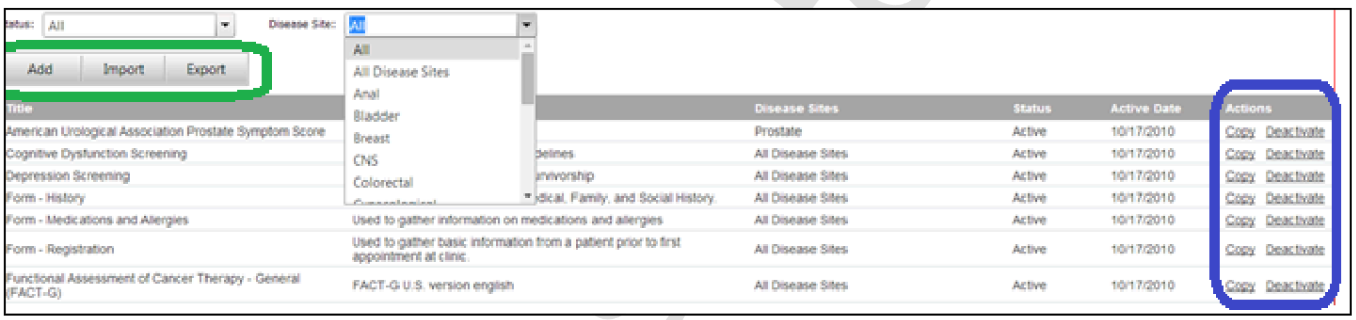
Manage Questionnaires

The Manage Questionnaires area allows an Equicare Administrator to create a questionnaire template for use in the Equicare system as well as import or export an existing template.

The Questionnaire Templates screen shows all the questionnaires that are in the Equicare system. The questionnaire status may be:

- **Draft**- Questionnaires that are not yet active in the Equicare system. This is the only area where draft questionnaires are shown. A care provider cannot assign a draft questionnaire to a patient.
- **Active**- Questionnaires that have been finalized and are available to a care provider to assign to a patient.
- **Inactive**- Questionnaires that have been finalized at some point but have been removed from active use as they are either out of date or no longer valid. A care provider cannot assign an inactive questionnaire to a patient.

The table of Questionnaire Templates can be filtered by the status (Drafts, Active, Inactive) or the disease site ('All' displays all questionnaires in the system, 'All Disease Sites' displays all questionnaires that are available to every disease site in the system).



In this screen, a user is able to:

- Add a questionnaire by clicking on the 'Add' button.
- Import an existing questionnaire template by clicking on the 'Import' button.
- Export a questionnaire template for use in another questionnaire template, click on the 'Export' button
- Copy a questionnaire to make changes to a template by selecting the Copy link in the Actions column. This creates a draft copy of the questionnaire which can be edited.
- Deactivate a questionnaire template by selecting the Deactivate link in the Actions column.

Add Questionnaire

Settings tab: the user can create the main settings for the Questionnaire, which include title, internal description, patient description, disease site and patient instructions.

- Title MUST be unique in the Equicare system. This title is presented to the patient.
- Internal Description is used to identify the questionnaire with information that will not be shown to the patient. This may be a technical name for the Questionnaire or a version number.
- Patient Description provides an explanation to the patient as to the purpose of the questionnaire and questions asked.

- Disease Site categorizes which disease site(s) the questionnaire is associated with. This association will be used when a care provider is assigning a questionnaire to a patient. The care provider will be shown a list of questionnaires associated with the patients Primary Disease site (which is set for each patient in Care Management).
- Patient Instructions provide detailed instructions to the patient about how to complete the questionnaire.

The 'Actions on Completion' section will determine what actions the system will take when the questionnaire is completed by the patient. The system is able to send an alert to the clinician as well as send a message to the patient. Both actions take place upon completion of the questionnaire by the patient.

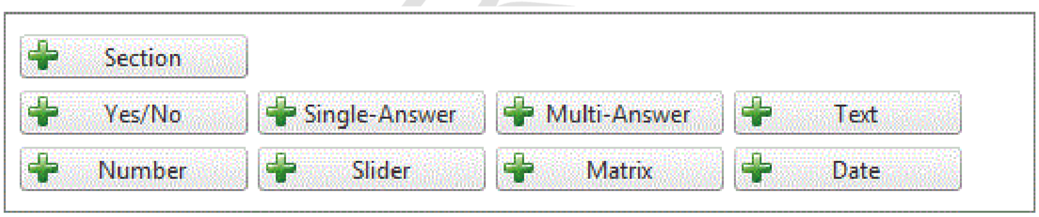
The default settings are available for questionnaires without any scoring. Completed questionnaires will trigger the default Clinician Alert and Patient. If scoring and score ranges are defined, they will be displayed here as well.

Actions on Completion

Event	**Clinician Alert**	**Patient Message**
Default		Thank you for taking the time to complete the questionnaire. It is an important tool for monitoring your health.
Total score		
0 to 2 (no stress)	No Alert	
3 to 6 (some stress)	Routine	
7 to 10 (high stress)	High	Your results indicate that you are having some troubles. We recommend that you call our office at (555) 405 3945 and set- up an appointment.

Clinicians can receive one alert per completed questionnaire. It will be the default alert unless score ranges are defined. If score ranges are defined, they will be used to determine clinician alerts. For patients, the default patient message as well as any patient message associated with a score range will be sent when a questionnaire is completed.

Questionnaire tab: the user can create the structure that will make up the questionnaire. This includes section headings, questions and answers.



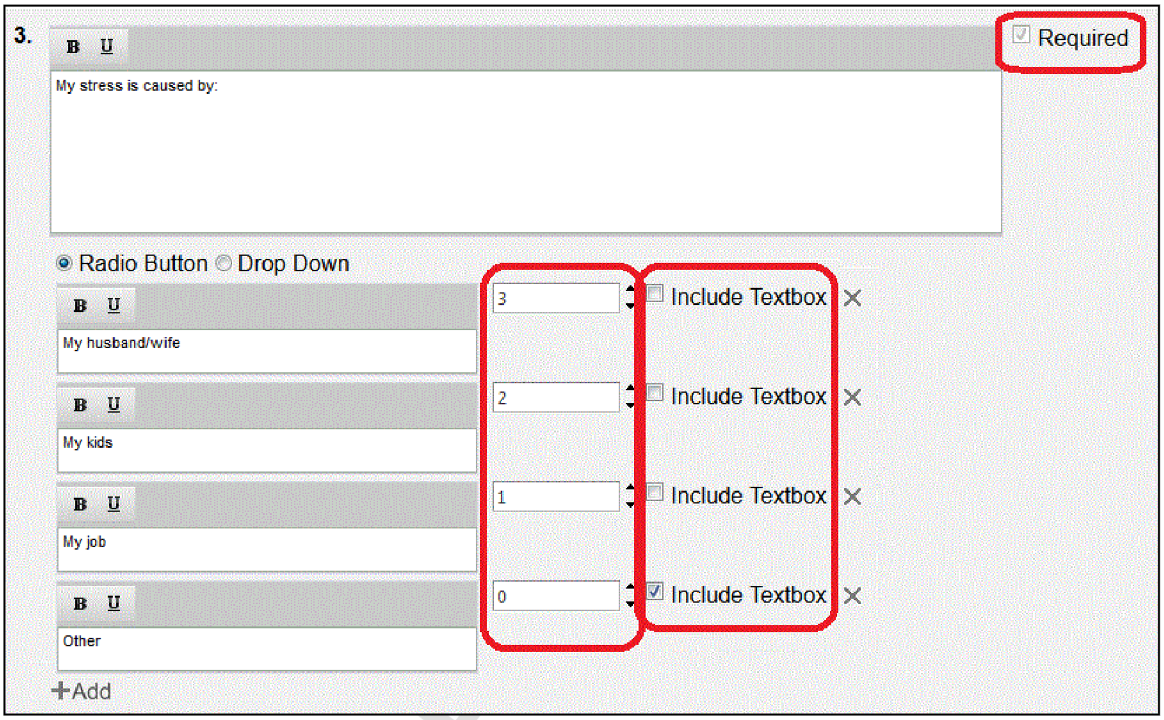
To create a section heading, choose the 'Section' button.

To create a question and answer set, choose one of the question types:

- **Yes/No**: a question which can be answered only 'yes' or 'no'. This question type allows each answer to have a score value. Each answer can also have a text box as part of the answer.
- **Single Answer**: a question which can be answered with only a single answer. Answers can be presented as radio buttons or in a dropdown. This question type allows each answer to have a score value. Each answer can also have a text box as part of the answer.
- **Multi-answer**: a question which can be answered with more than one answer. This question type allows each answer to have a text box as part of the answer.

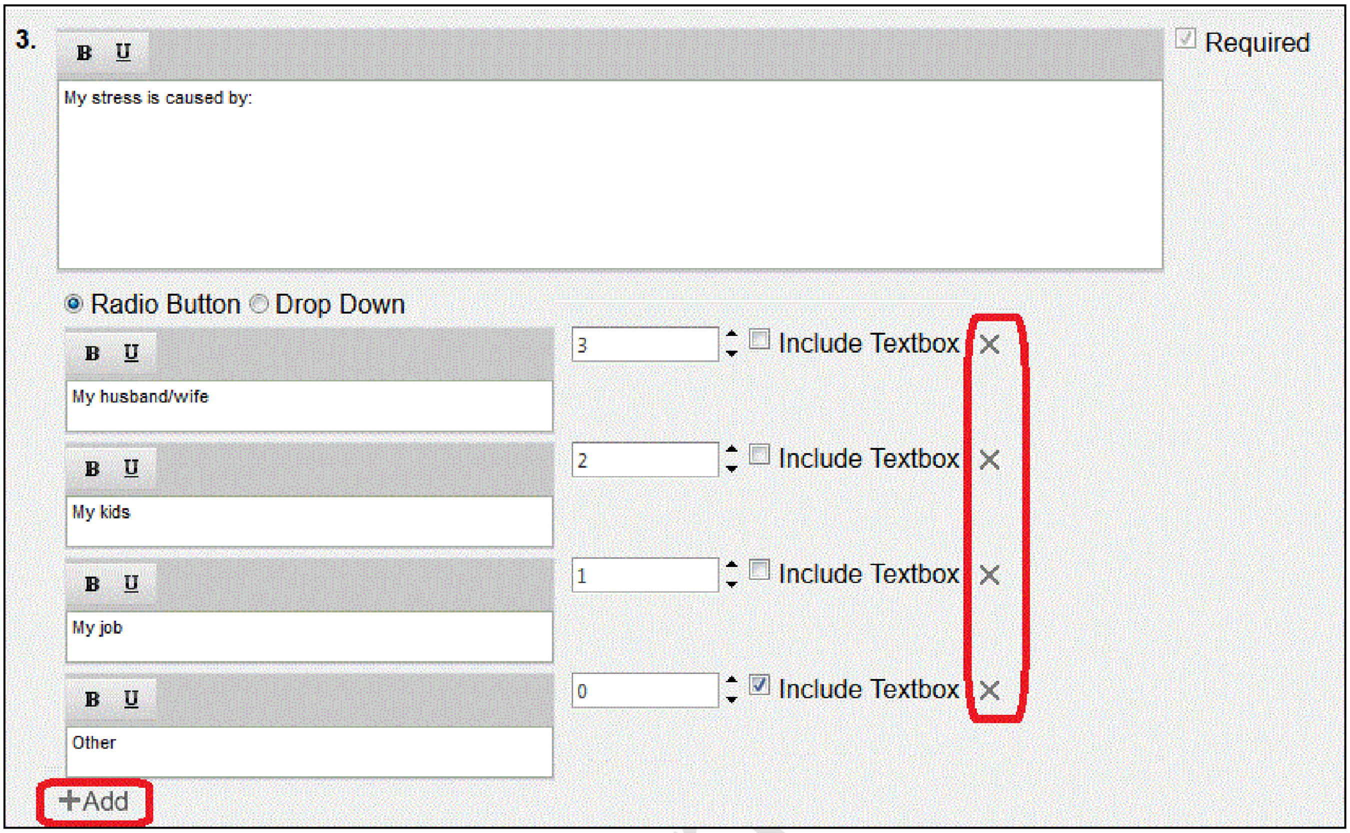
- **Text**: a question which is answered with text
- **Number**: a question with a lower and upper numeric boundary
- **Slider**: a question with a lower and upper numeric boundary presented on a visual scale. The lower and upper boundaries of the scale can be labeled.
- **Matrix**: allows the creation of more than one question with the same answer selections. This question type allows each answer to have a score value.
- **Date:** a question for which the answer is a date.

When creating the question, a 'required' option is available. The patient must enter an answer for a required question. They cannot complete the questionnaire without answering all required questions.

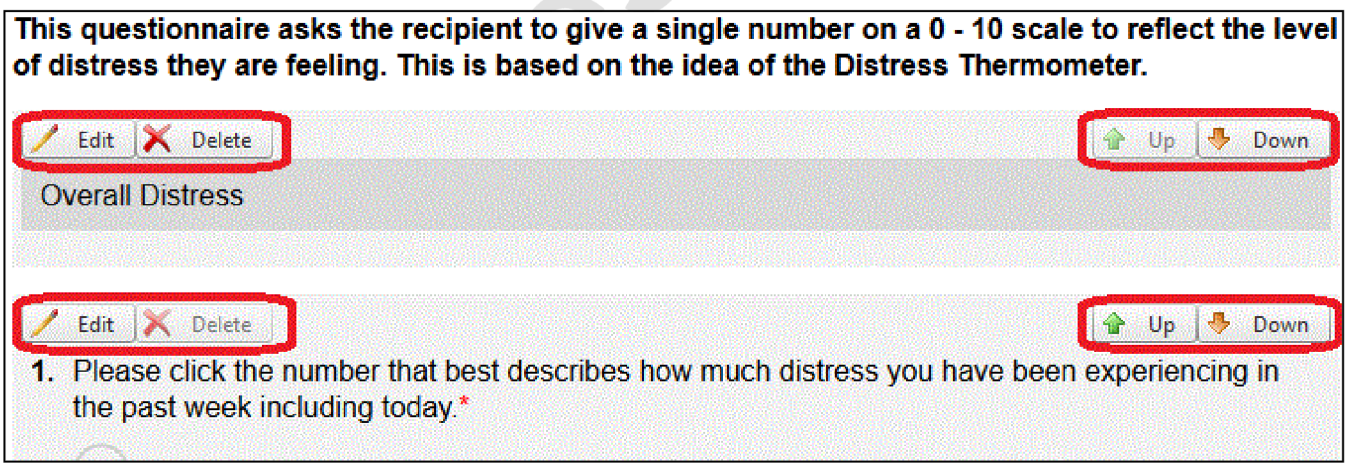


In some question types, a score field is available. The value placed in the score field will be used in a scoring algorithm. As well, some question types allow the user to add a textbox to the answer to allow the patient to add comments.

To delete an answer from a question, click the 'x' at the end of the row. To add another answer, click the '+ Add' at the bottom of the answer section.



Questions and associated answers can be modified or deleted. To modify a question, click the "Edit" button. To delete a question and the associated answers, click the delete button. Note: questions which are included in a scoring algorithm cannot be deleted. The scoring algorithm must be modified or deleted first in order to delete the question.



To change the order of section headings and questions, use the 'Up' and 'Down' buttons on the right side of the item.

Scoring tab: a score algorithm and score ranges can be set up for the questionnaire. The algorithm and range information will be available for the care provider reviewing the questionnaire.

The 'Description' field is used to give the score algorithm a useful name.

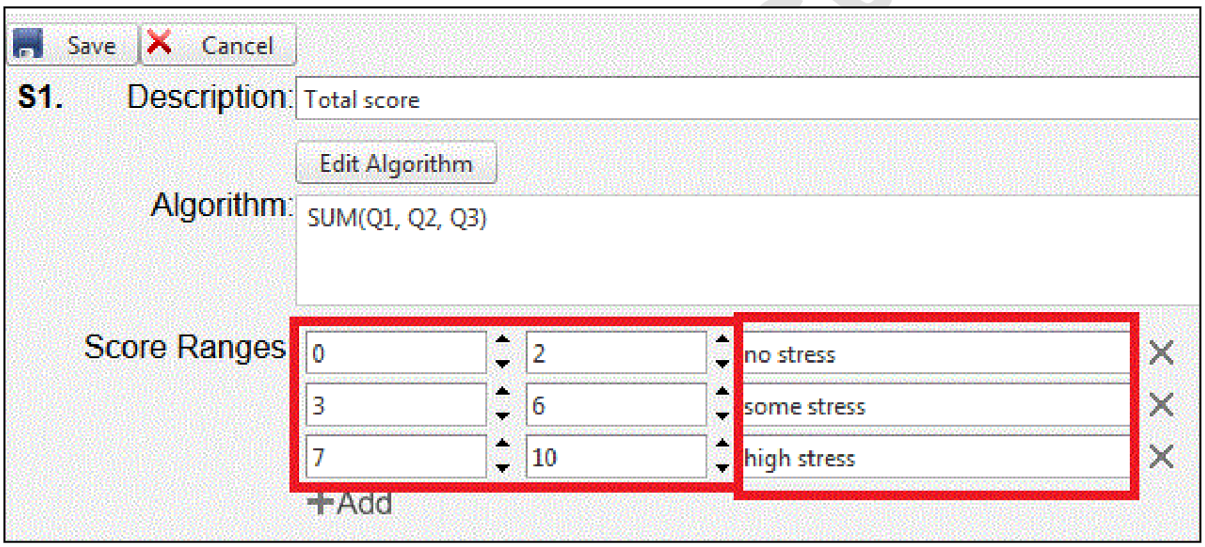
To set-up an algorithm, click the 'Edit Algorithm' button. A window opens which allows the user to select the function and the questions that should be included in the function. Functions can be:

- SUM: adds the score each question included in the algorithm to produce a sum.
- AVE: averages the score of all questions included in the algorithm.
- Single Question: presents the score given on a single question.

Questions must be marked as 'required' in order to be included in a scoring algorithm. Questions that are not required will be displayed but cannot be selected (the checkbox is disabled).

A score algorithm can reference other score ranges. For example, an algorithm for total score could sum score algorithm S1, score algorithm S2, and score algorithm S3 to return a score value.

Once the scoring algorithm is established, ranges based on the score can be set-up. A score range involves choosing the range and stating the evaluative description that corresponds to a questionnaire scored within that range. For example, for an NCCN Distress Thermometer, a score range of 0 to 2 could have an evaluative description of "no stress". A score range of 7 – 10 could have an evaluative description of "high stress". The evaluative description is designed to inform the clinician who is alerted when the questionnaire is completed or reviews the questionnaire results.



Once score ranges are added, they will be displayed on the Settings tab in the 'Actions upon Completion' area. Clinician Alerts and Patient Messages can now be set-up based on the score range.

Note that once a score range is established, the default clinician alert is unavailable. An alert, if desired, must be set-up on the score range.

Patients will receive the default patient message as well as any patient message associated with a score range.

Finalizing a questionnaire

A questionnaire remains in draft format until it is finalized. To finalize a questionnaire, click the 'Finalize' button.

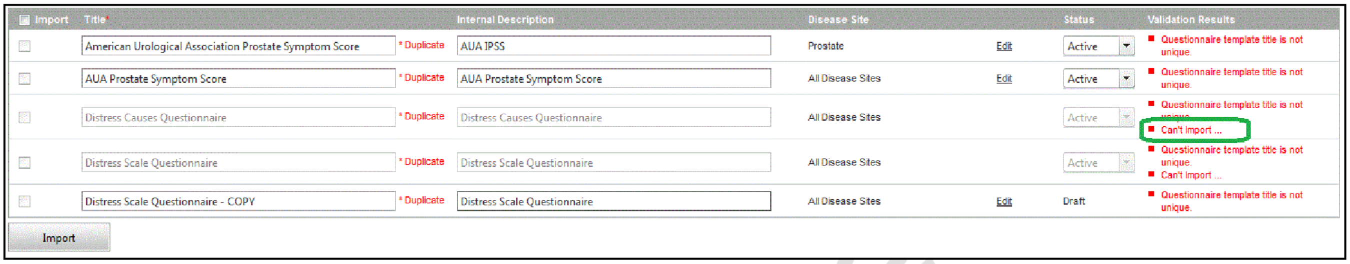
Questions and answers can be modified or deleted until the questionnaire is finalized. Questions and answers cannot be changed for a finalized questionnaire.

Once a questionnaire is finalized, it becomes active in the Equicare system and can be assigned to patients.

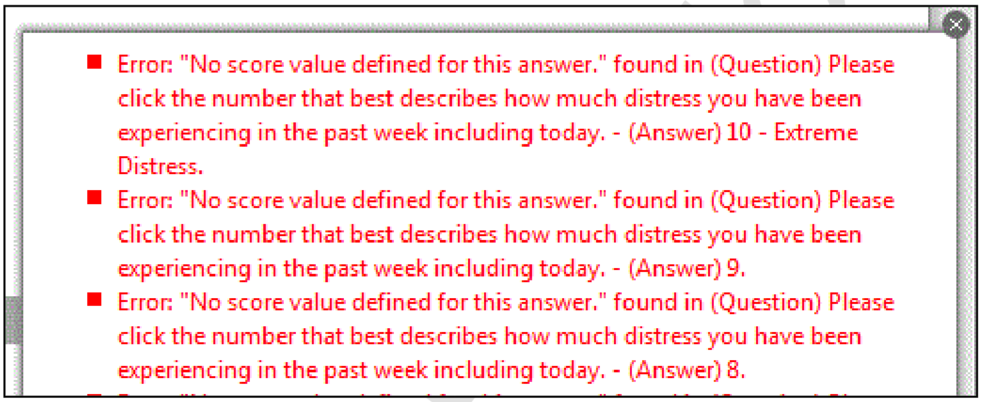
Importing a questionnaire

To import a questionnaire into the Equicare system, click on the 'Import' button. Select the template to import by click the 'Select' button. A browse screen opens. Navigate to the location of the questionnaire(s) to be imported. Click 'Open'.

The file location will now be shown in the Import File area. Click the 'Upload' button. The questionnaire templates will be validated. If a questionnaire is not valid for some reason, a relevant message will be displayed.



Multiple messages associated with a validation error will be displayed as "Can't Import…." (green area above). Click on this message to be presented with the error messages.



Some validation error messages can be addressed in the Import screen. For example, if the title is a duplicate, it can be changed in the Import screen.

Some other fields can be changed when importing the questionnaire. The Internal Description, Disease Site and Status of the questionnaire can be changed. Note that a questionnaire with Draft status cannot be made active in the import workflow. A draft questionnaire can only be imported as a draft.

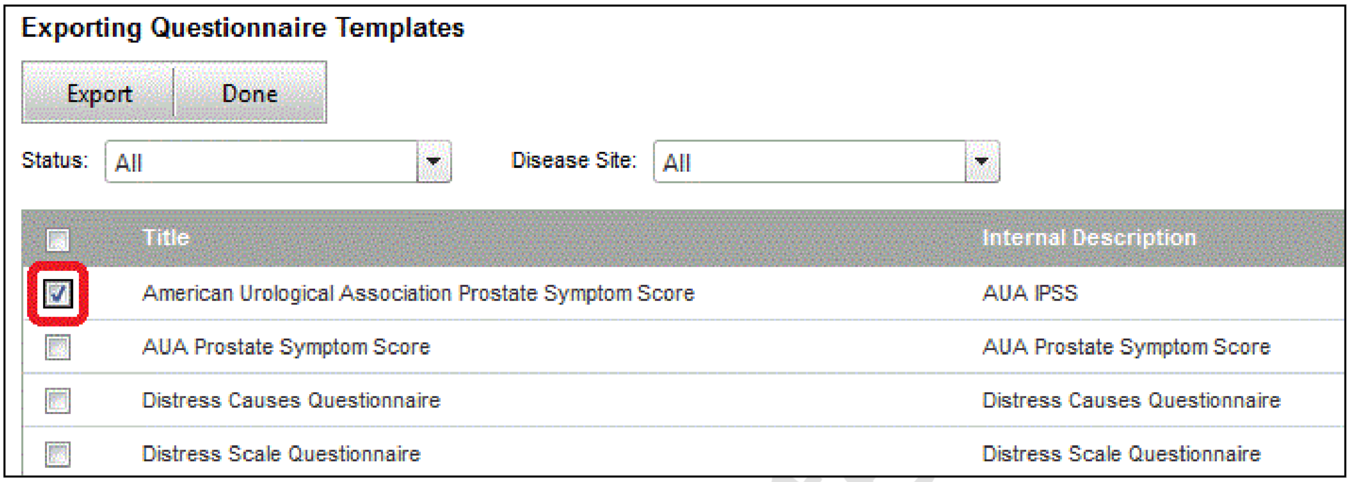
Questionnaires that are valid can be selected using the checkbox in the Import column. Once the questionnaires for import are selected, click the 'Import' button to finish the process.

Mosaiq Compatible Questionnaires

It is possible to import a questionnaire that was created in MOSAIQ. When a patient completes a questionnaire in Equicare that was imported from MOSAIQ, the patient responses can be automatically sent back to MOSAIQ's Patient Reported Outcomes module. Please contact the EHI Services team if you would like to import a MOSAIQ questionnaire.

Exporting a questionnaire

Any questionnaire available in the Equicare system can be exported. Select the checkbox for the questionnaire you wish to export. Click the 'Export' button.



The user is given the option to open the exported file or save it. It is now available to be imported to another Equicare System. Click the 'Done' button to return.

Deactivating a questionnaire

Deactivating a questionnaire allows the administrative user to deactivate a questionnaire or replace it with a new questionnaire.

To start, select the Deactivate link in the Actions column of the questionnaire you wish to make inactive.

If the questionnaire to be deactivated is not assigned to any patients, it will be made inactive. It can no longer be assigned to patients.

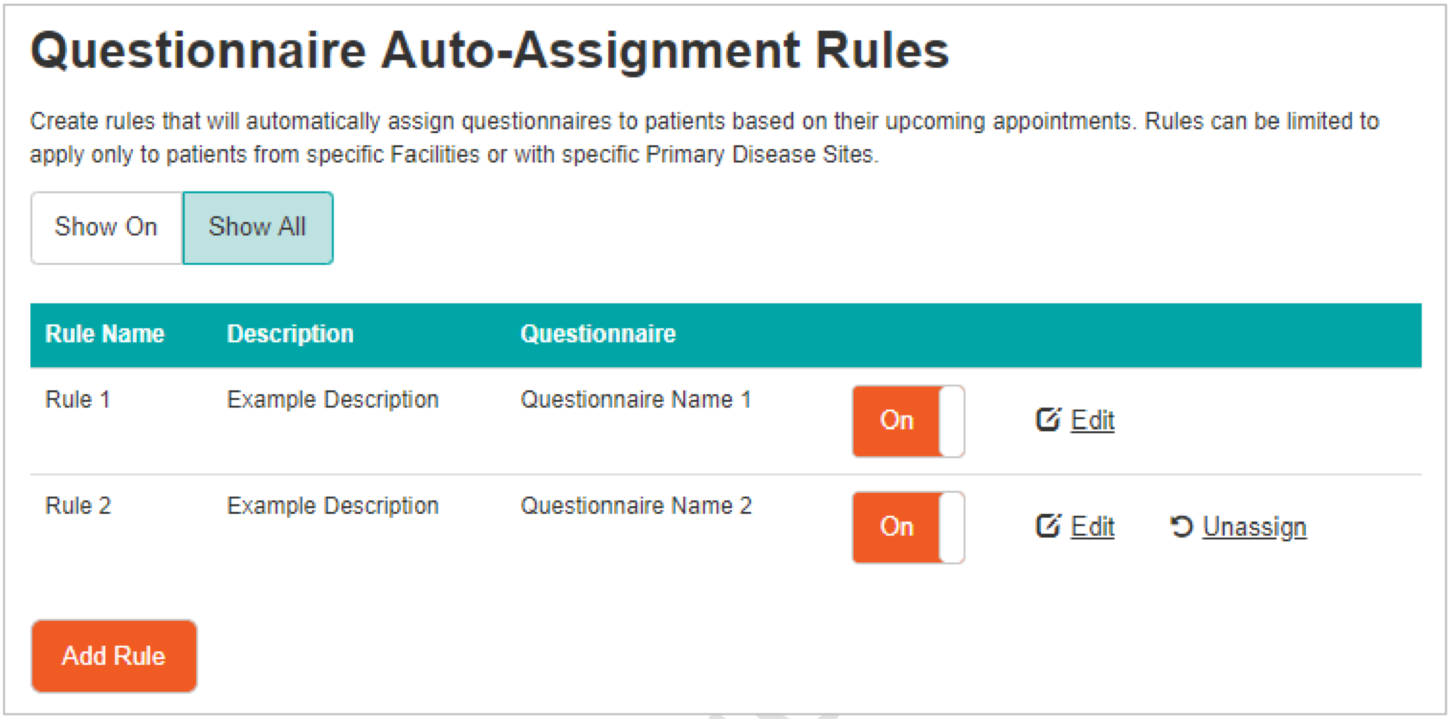
If the questionnaire to be deactivated is currently assigned to patients, the administrative user will be presented with options for how to deal with the assigned questionnaires. The options are:

- Leave outstanding assignments unchanged. Patients will receive notifications to complete the questionnaire and can complete the questionnaire, even after it has been deactivated.
- Delete outstanding assignments. Patient will not receive a notification to complete the questionnaire and will no longer have the option to complete the questionnaire.
- Replace with assignments to another questionnaire. Patients will receive notifications to complete a new questionnaire which replaces the original questionnaire. The replacement questionnaire must already be created in order to be used in the replace option of the deactivate workflow.

Manage Questionnaire Assignment Rules

You have the option of setting up rules that will automatically assign questionnaires to patients based on their upcoming appointments. This feature can be accessed via EQUICARE Admin > Questionnaire Auto-Assignment Rules.

The main page will display any existing rules. From here you can to turn each rule on or off, and edit each rule.



How Auto-Assignment Rules Work

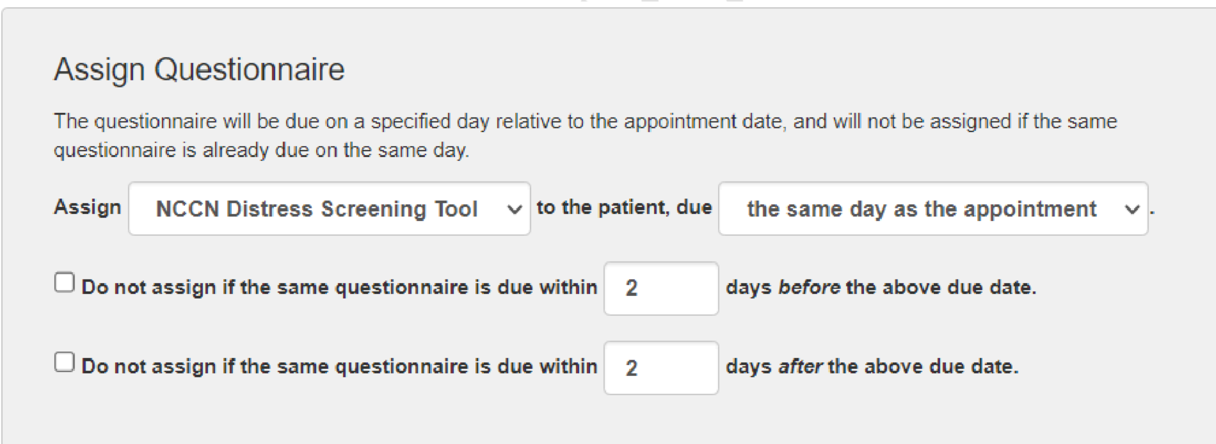
The best way to understand Auto-Assignment Rules is to create a rule. However, below is some general information you should know before creating your first rule:

- Each Questionnaire Auto-Assignment Rule runs in the background periodically, assigning one questionnaire to matching patients based on information associated with their patient record.
- The information that a rule will look for is specified when adding or editing a rule. The rules are focused on a patient's upcoming appointments, with some other supporting information that can be used to narrow who the rule will apply to.
- The due date of the questionnaire will be the date of the appointment that matched the rule.
- When looking for matching appointments, the rule will only look 2 days into the future by default. However, this can be increased up to 7 days.
- The rules will never assign the same questionnaire multiple times to a patient to be due on the same day. However, there are options available to expand that to include several days before or after the appointment.
- If a rule is disabled, all questionnaires assigned by that rule (that have not yet been completed or declined) will be automatically unassigned. This does not affect questionnaires that were manually assigned.
- If a rule has been edited and the criteria changed, any assigned questionnaires are re-evaluated based on the updated rule and unassigned if the patient no longer matches the rule. This does not affect questionnaires that were manually assigned.

Adding a New Rule

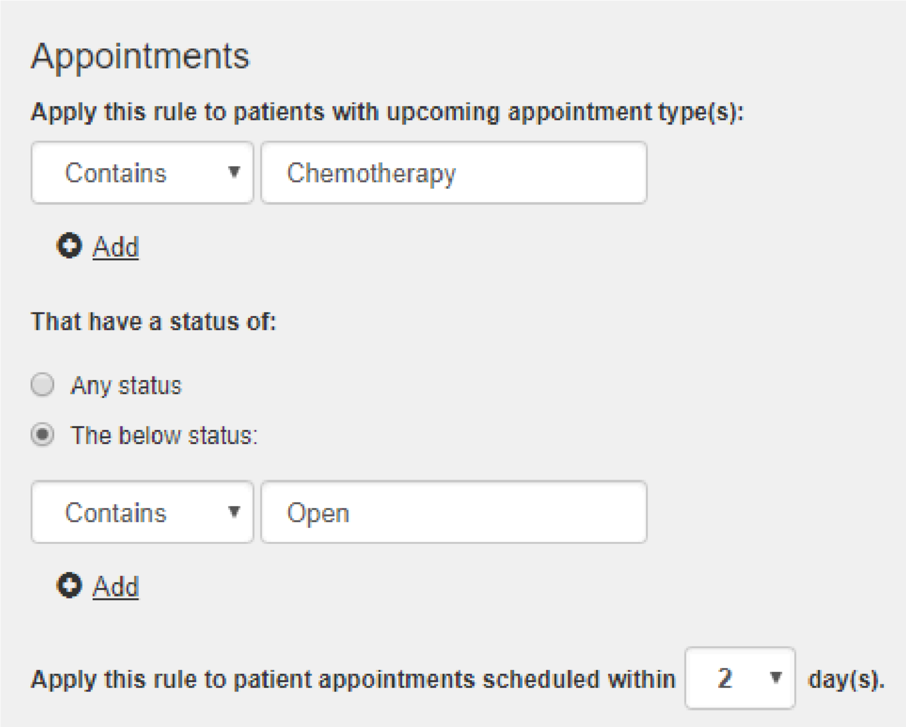
1. Click **Add Rule**.
2. Provide a name for the rule and a description of the purpose of the rule (optional).

3. In the *Assign Questionnaire* area, select the questionnaire that this rule will assign, as well as the Questionnaire's due date relative to the appointment date (the same day, or up to 7 days before or after the appointment).



By default, this questionnaire will not be assigned if the same questionnaire is already due on the same day. If you would like to expand the number of days this applies to, select the desired checkboxes below and enter the number of days before and/or after the selected due date.

4. In the *Appointments* area, enter the appointment type that this rule should look for. The text entered into the field can be matched against the type of the appointment using one of: Equals, Starts With, or Contains. To have the rule look for more than one appointment type, click the **Add** button and enter another type.



If the rule should look for appointments of the specified type that have any status, select the *Any status* option. If you'd like to limit it to specific statuses, select *The below status* and enter the desired status. As for the appointment type, you can add more than one status.
By default, the rule will look for appointments up to two days into the future. This means that as time moves ahead, patients will be assigned questionnaires two days before their appointment, due on the day of the appointment. If desired, use the dropdown increase the number of days to a maximum of seven.

5. In the *Facilities* area, select whether to include patients from *Any facility*, or choose *The below facilities* and place a check next to each facility to include.
6. In the *Primary Disease Site* area, select whether to include patients with *Any Primary Site*, or choose *The below Primary Sites* and place a check next to each Primary Site to include.
7. Click **Save**.

When a new rules is saved, it is turned off by default. This allows you the opportunity to review the rule before committing, or to begin the process of creating the rule, saving your progress, and returning to finish later.

When you are satisfied with the rule you have created, change the toggle from Off to On. The change takes effect immediately.

If you would like to turn a rule off, change the toggle from On to Off. Disabled rules have an additional *Unassign* button available. Although all questionnaires assigned by a rule that is disabled will be automatically unassigned (excluding those that have been submitted or declined), it may take a few minutes for that to happen. If you'd like to make sure the unassignment process happens immediately, click **Unassign.**

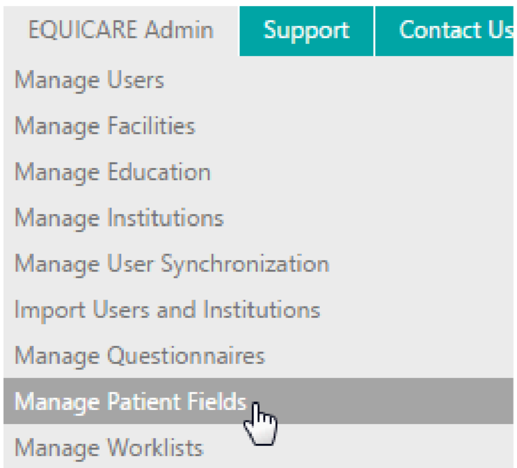
Editing a Rule

To edit a rule, click its **Edit** button. Editing a rule has the same steps as the adding a new rule. When a rule is changed and saved, all questionnaires previously assigned by the rule will be automatically unassigned (excluding those that have been submitted or declined) just like when a rule is disabled. However, the updated rule will be run again shortly and the questionnaire will be assigned again according to the new criteria.

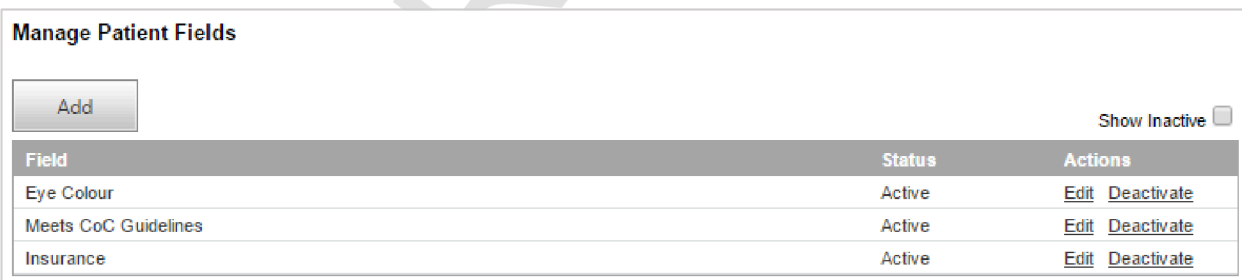
Manage Patient Fields

By using Patient Fields, additional information can be recorded for patients to meet the specific needs of a clinic, and patients can be organized based on these fields. Up to twenty custom patient fields can be added to EQUICARE by an administrator. These fields can be created with a set of values, where one value can be selected for a patient at any given time.

To manage the custom Patient Fields available for use in EQUICARE, go to the *EQUICARE Admin* menu and click **Manage Patient Fields**.



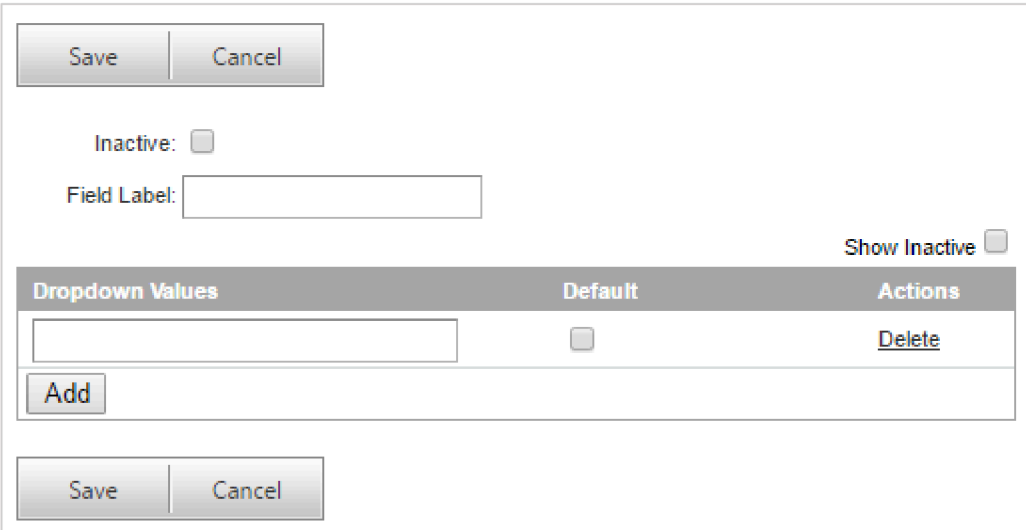
The Manage Patient Fields page displays all currently active patient fields. To also display any inactive fields, place a check next to *Show Inactive*. An active patient field can be made inactive by clicking the **Deactivate** link to its right.



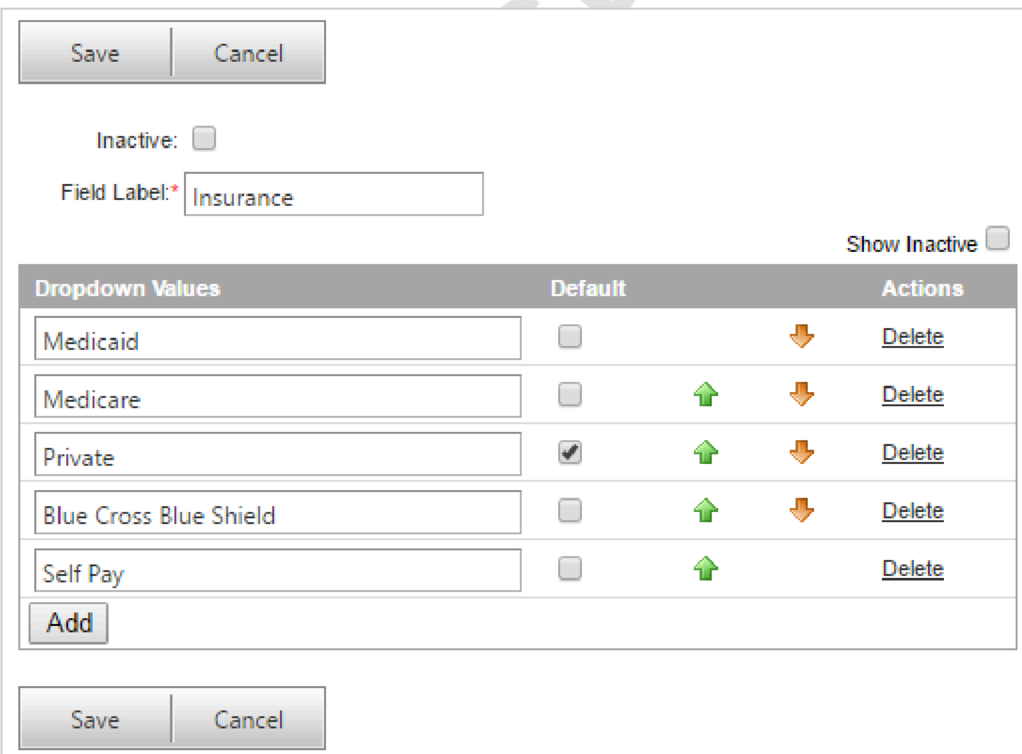
Adding a Custom Patient Field

You can add up to twenty custom patient fields. Each field can have as many selection values as desired. The selections will appear as a drop-down list in a patient record, where only one value can be selected at a time. To add a new patient field:

1. Click **Add**.
2. Enter a name for the custom patient field in the *Field Label* area.



3. Type a desired value in to the blank within the *Dropdown Values* column.
4. To add another value for this field, click the **Add** button and enter the new value in the field that appears.

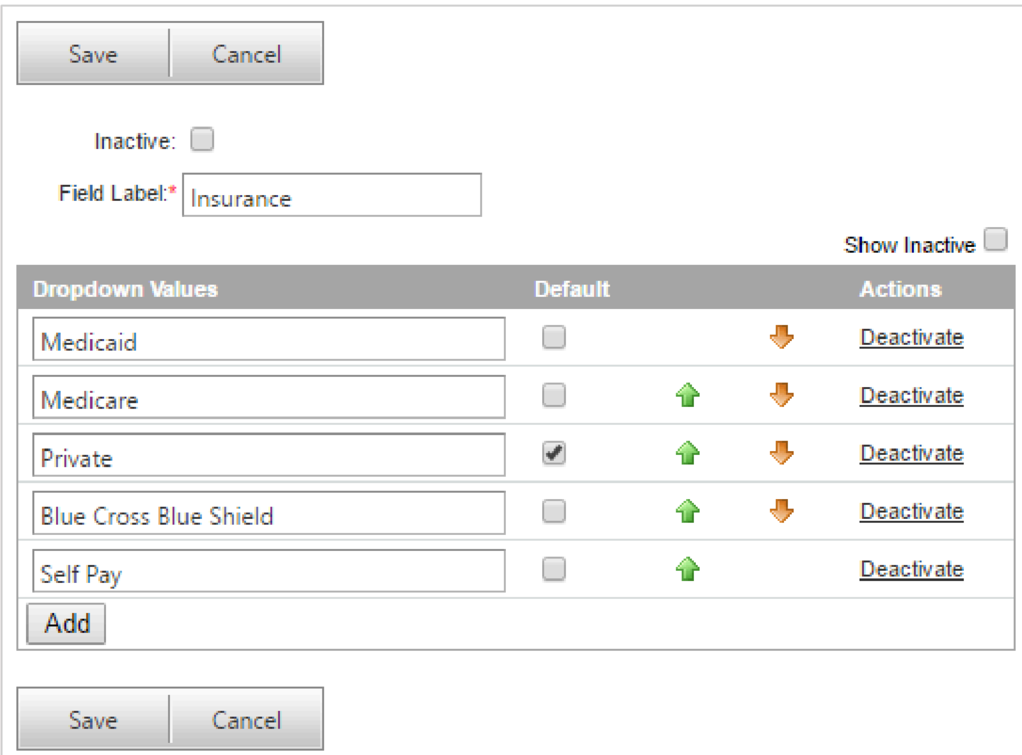


5. To remove a value from the list, click the **Delete** link to its right. Note that you can only delete a value that you have added to the list but have not yet saved. A value that has already been saved will instead have a *Deactivate* option.

6. If desired, select one value to be the default by placing a check in its box. This means that all patients within EQUICARE will have this value unless it is changed in a patient record. If no default is selected, no value will be assigned to patients (i.e. the field will be blank) unless it is changed.
7. Click **Save**.

Editing a Custom Patient Field

To edit an existing Patient Field, click the **Edit** link on its right.

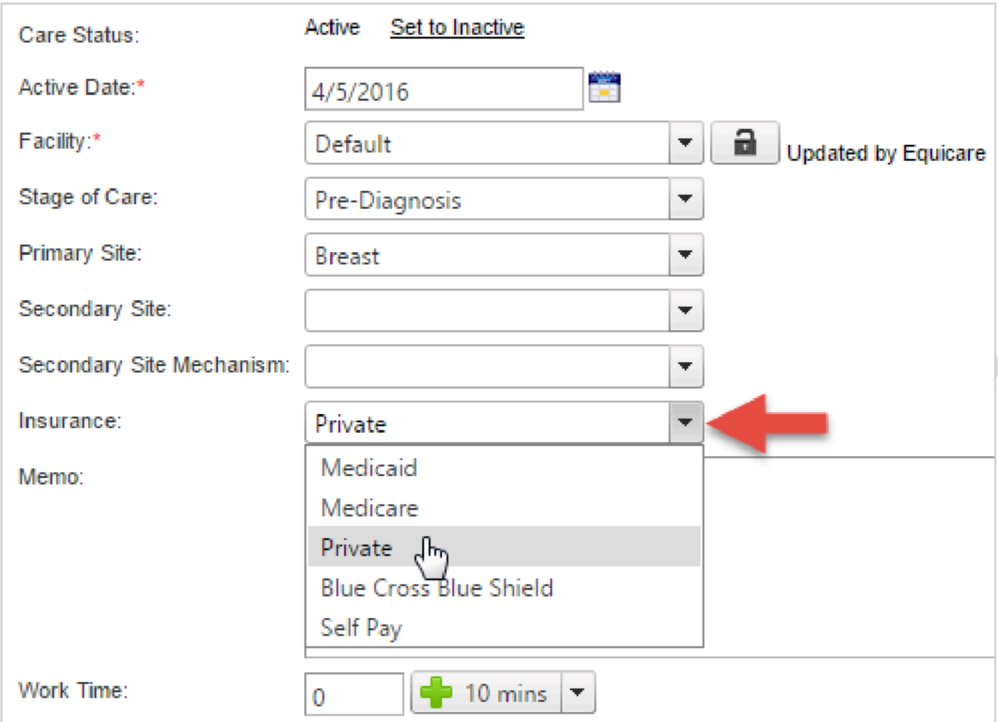


The following changes can be made:

- The field and value labels can be changed. Changing the text for a value will update all patient records assigned that value so they use the new text. Changing the field label will update it everywhere it appears.
- The custom patient field can be deactivated by placing a check in the *Inactive* box. A deactivated field cannot be viewed in any records or lists, but the values remain saved. The field can be reactivated again by unchecking the *Inactive* box.
- To make an existing value unavailable, click the **Deactivate** link to its right. The value will not be deleted, but it will no longer be available as a choice for this field. If you deactivate a value that is already assigned to patient records, the value will remain assigned to those patients until changed.
- If you wish to reactivate a value that you previously deactivated, place a check next to the *Show Inactive* option to display all deactivated values, then click the **Activate** option for the value you'd like to reactivate.
- To change the order of the values, click the up and down arrows.
- To add more values, click the **Add** button.

Assigning Custom Field values to Patients

The value of a patient field can be set by going to the *Patient* menu and clicking **Care Management**. Click the drop-down list for the field you wish to change and select the desired value.

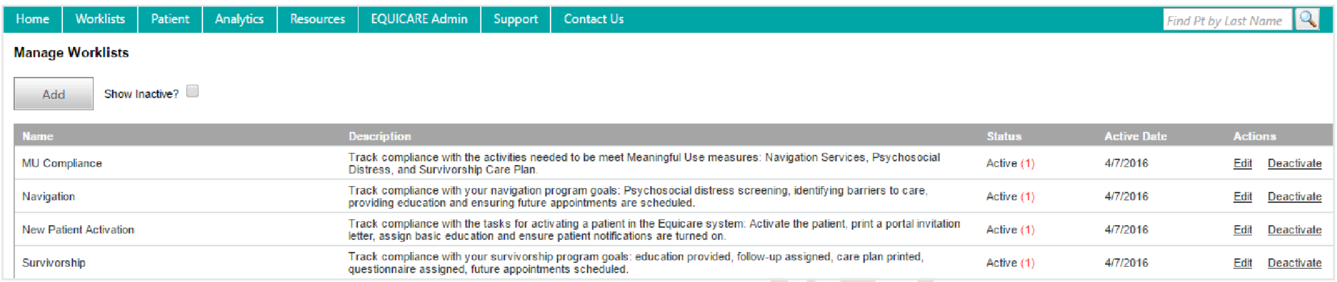


Make any other required changes, then click **Save**.

Managing Worklists

Worklists assist clinical users in managing patient care tasks, especially activities tied to Meaningful Use compliance measures. EQUICARE Active Patient Portal comes with two example worklists, and administrators can edit them for specific clinical needs, compliance requirements, or accreditation with specific associations.

Users with Administrative rights can manage Worklists by going to the **EQUICARE Admin** menu and clicking **Manage Worklists**. The Manage Worklists page shows all *Active* worklists. Inactive worklists can also be displayed by clicking the *Show Inactive?* checkbox.



Name	Description	Status	Active Date	Actions
MU Compliance	Track compliance with the activities needed to be meet Meaningful Use measures: Navigation Services, Psychosocial Distress, and Survivorship Care Plan.	Active (1)	4/7/2016	Edit Deactivate
Navigation	Track compliance with your navigation program goals: Psychosocial distress screening, identifying barriers to care, providing education and ensuring future appointments are scheduled.	Active (1)	4/7/2016	Edit Deactivate
New Patient Activation	Track compliance with the tasks for activating a patient in the Equicare system. Activate the patient, print a portal invitation letter, assign basic education and ensure patient notifications are turned on.	Active (1)	4/7/2016	Edit Deactivate
Survivorship	Track compliance with your survivorship program goals: education provided, follow-up assigned, care plan printed, questionnaire assigned, future appointments scheduled.	Active (1)	4/7/2016	Edit Deactivate

Setting a Worklist Status

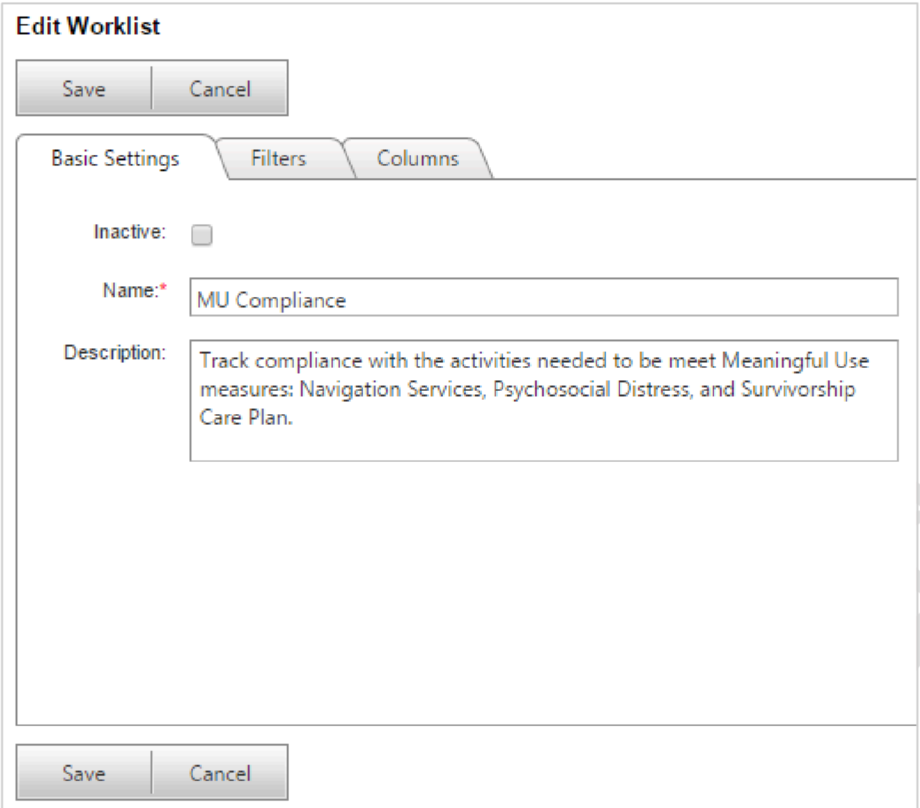
Each worklist can be made active or inactive by clicking the **Activate** or **Deactivate** (respectively) in the Actions column. Only Active worklists are available for use by users.

Note that users can make changes to the filters used to refine the patients included in their worklists. Setting an Active worklist to Inactive will reset any filter refinements that users may have made.

Editing a Worklist

To edit the settings of a worklist, click the **Edit** link in the Actions column to the right of the worklist. Editing a worklist involves three types of settings: *Basic Settings*, *Filters*, and *Columns*. When editing an existing worklist, the current settings of the worklist will be seen.

> **Note:** Modifying the settings of a worklist will reset the personalized refinements that users may have made on this worklist.



Basic Settings

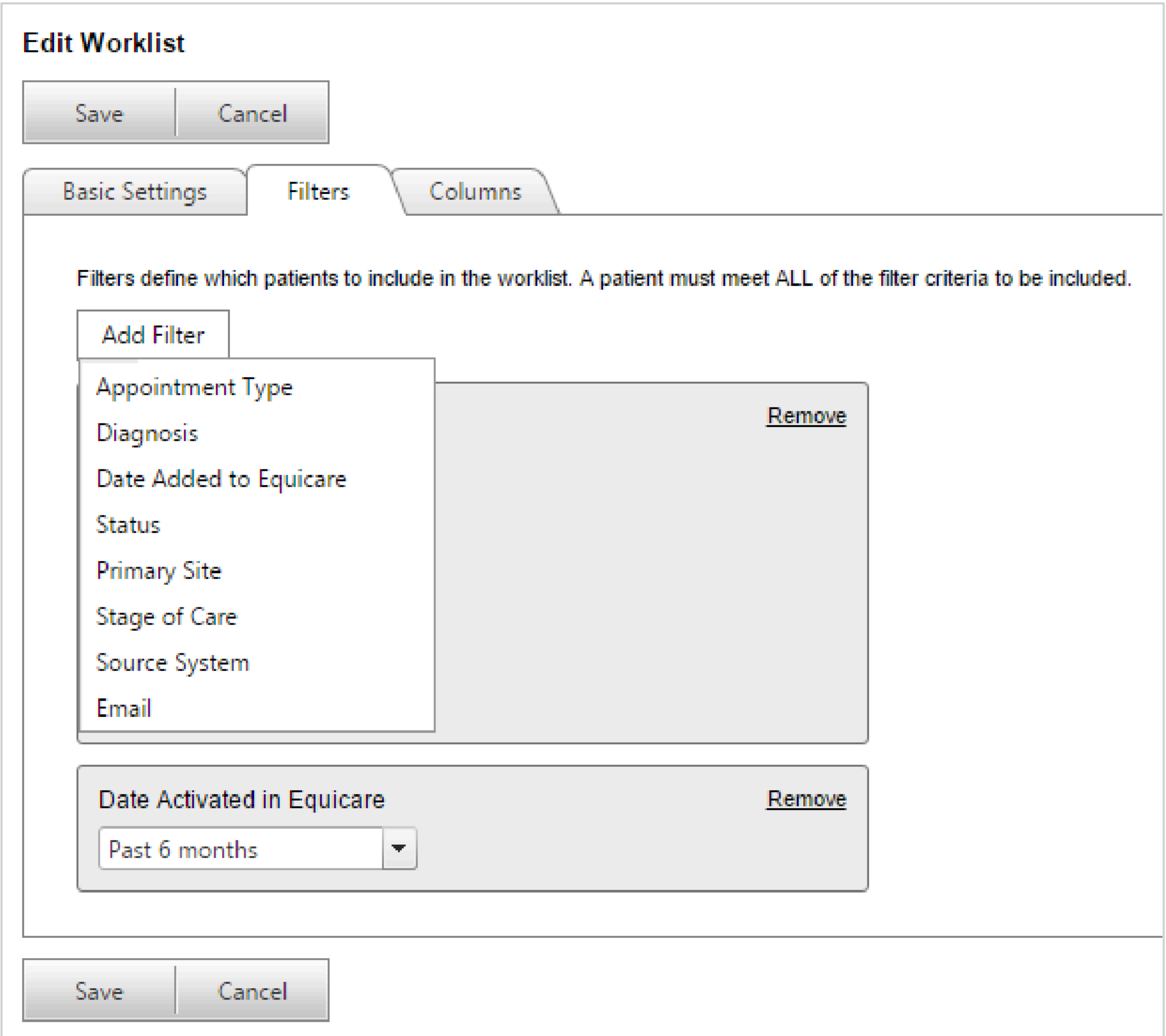
The Basic Settings tab has three options:

- **Inactive:** If this checkbox is selected the worklist is inactive and will be unavailable for use.
- **Name:** A worklist title is required. If changing the title, we recommend that you keep it short as it will appear in the Worklist menu.
- **Description:** Enter a description of this worklist. This can be used to explain the purpose of the worklist. This is visible when a user goes to the *Worklists* menu and clicks **Manage Worklists**.

Filters

Filters are used to define which patients appear in a worklist and to narrow down the list of patients the user will be working with. For example, a worklist dedicated to monitoring patient activations can be filtered to show only patients with a specific Diagnosis. When creating or editing a worklist, an Administrator can set the default Filters, which will be used until a user changes them for their own use.

The Filters tab allows you to add new filters or modify existing filters.



A filter can be added by clicking the **Add Filter** button and then clicking the filter type.

> ***Note:*** *The Add Filters drop-down list will only include filters that have not already been added to the worklist. If the Add Filter button does not provide any options when clicked, there are no additional filters that can be added to the worklist.*

Filters added to the worklist using the above steps can also be removed from the worklist by clicking the **Remove** link at the top right of the filter box.

More than one filter or filter value can be used at a time, so it is important to understand how they combine to determine the patients that appear in the worklist. There are two simple rules to remember:

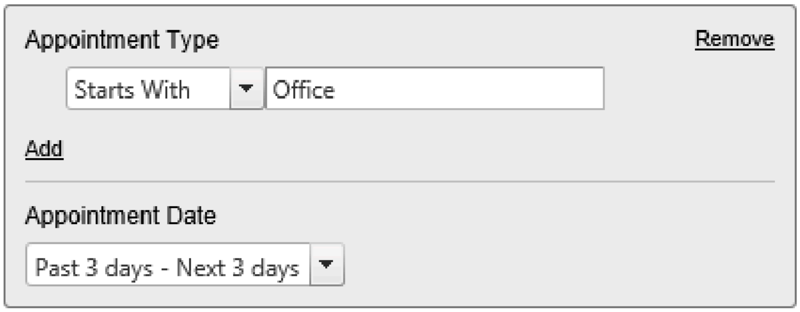
- When using more than one value within a single filter type (e.g. selecting more than one Diagnosis option), the filter values will be combined using a logical **OR**. This means that a patient will be included in the worklist if they match *any* of the selected options.
- When using more than one filter type (e.g. selecting a Diagnosis of *Prostate* and also setting Date Added to *Past 4 weeks*), the filters will be combined using a logical **AND**. This means that a patient will be included in the

worklist only if they match *both* the Diagnosis filter *and* the Date Added filter (e.g. patients with a diagnosis of Prostate that were added to EQUICARE in the last 4 weeks).

There are ten types of filters:

Appointment Type

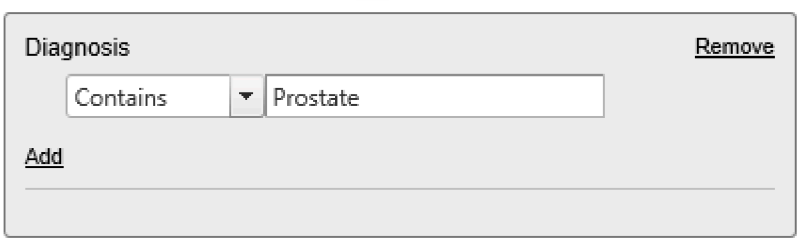
Filter the worklist based on the appointment information found in the patient record. This filter has two components: One or more appointment type keywords, and the date range in which the appointments occurred. Using this filter requires that at least one keyword is specified and an appointment date is selected.



Appointment Type Keywords: Enter the desired keyword in the field and use the drop-down list to select one of the Operators (*Equals*, *Starts With*, or *Contains*). The operator determines how to compare the text in field to the information in the Appointment. More than one keyword can be included by clicking **Add**.
Appointment Date: Use the drop-down list to select the appointment date range. Date ranges are calculated each time the worklist is viewed.

Diagnosis

Filter the worklist based on keywords found in the patient Diagnosis information. Using this filter requires that at least one keyword is specified.



Enter the desired keyword in the field and use the drop-down list to select one of the Operators (*Equals*, *Starts With*, or *Contains*). The operator determines how to compare the text in field to the information in the Diagnosis. More than one keyword can be included by clicking **Add**.

Email

Select one or more Email values from: *All*, *Email address missing*, or *Email address entered*.

A patient that does not have a Primary email or Notification email is considered to be missing an email address.

Date Added to Equicare

Filter the worklist based on the date that the patient was added to EQUICARE (either manually added or automatically received from an external system).

Use the drop-down list to select the date range. Date ranges are calculated each time the worklist is viewed.

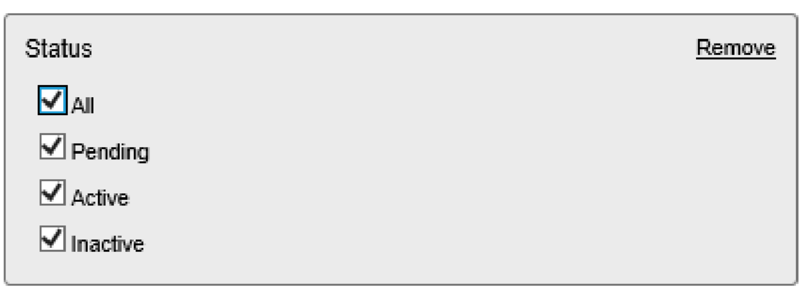
Date Activated in Equicare

Filter the worklist based on the date that the patient was activated in EQUICARE. Note that this is not necessarily the same as when they were added to EQUICARE (a patient can be activated any time after they were added to EQUICARE).

Use the drop-down list to select the date range. Date ranges are calculated each time the worklist is viewed.

Status

Filter the worklist based on the patient's current status. To use this filter, at least one option must be selected.



The options include all existing patient statuses in EQUICARE: *Pending*, *Active*, and *Inactive*.

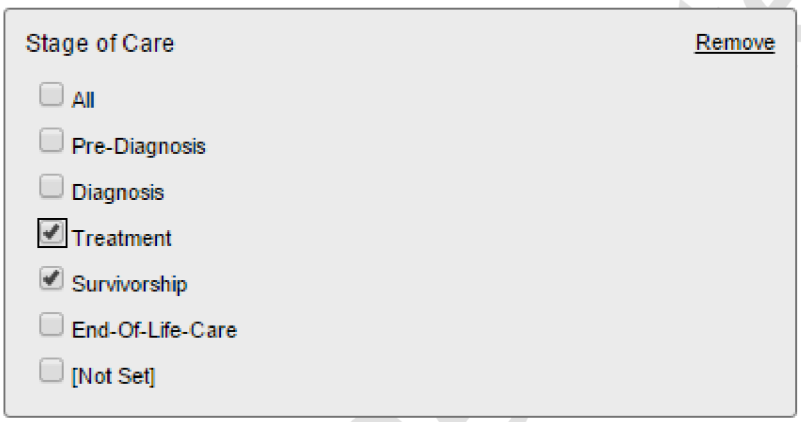
Primary Site

Filter the worklist based on the patient's primary disease site. Using this filter requires that at least one option is selected.

Options include all existing Primary Sites in EQUICARE.

Stage of Care

Filter the worklist based on the Stage of Care of the patient. To use this filter, at least one option must be selected.



Options include all existing stages of care in EQUICARE. Note that the global Stage of Care list is configurable by Administrators.

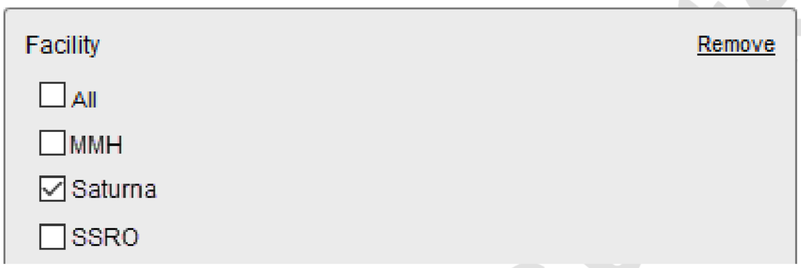
Source System

Filter the worklist based on the Source System (the data system from which the patient record originated). To use this filter, at least one option must be selected.

Options include the list of all existing source systems that EQUICARE is connected to.

Facility

Filter the worklist based on the Facility for which the patient record is associated. Each patient must be associated with one and only one facility. To use this filter, at least one option must be selected.

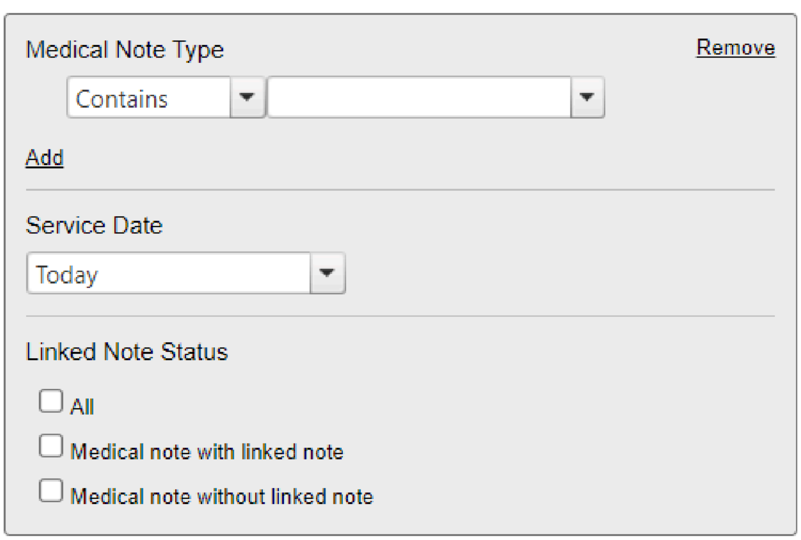


Note: This filter is only useful for EQUICARE installations that span more than one Facility.

Options include all existing facilities in EQUICARE.

Medical Note Filter

Create a filter that will include only the patients with a medical note type matching the rules set in the filter: The text in the note title, the service date range, and whether it is linked to a Chart Note or not.



Custom Patient Field Filter

Create a filter that will include only the patients with a Custom Patient field set to the value(s) specified in the filter. One filter can be added for each Custom Patient Field in the system.

Email Filter

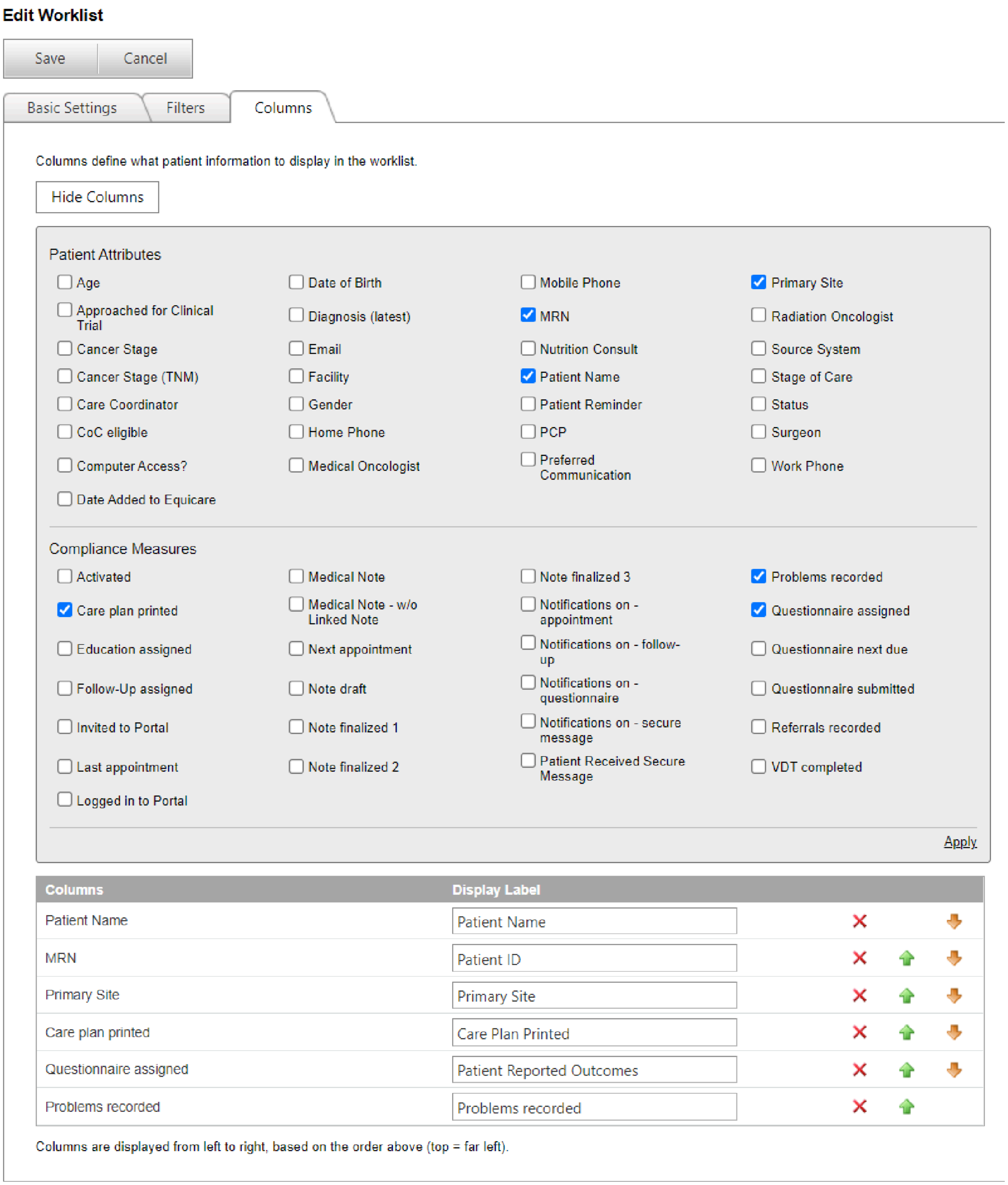
Create a filter that will include only the patients that have an email address, do not have an email address, or both.

Columns

Information about the patients included in the worklist is displayed in a series of columns. On the Columns tab you can define which information will appear in worklist columns. Any *Patient Attribute* or *Compliance Measure* can be displayed in a worklist column.

> **Note:** Any *Custom Patient Fields* that have been created will be displayed as part of the *Patient Attributes* list.

To view the list of all possible columns, click the **Add Columns** button. To add columns to the worklist, place a check in the box next each desired option and click the **Apply** link at the bottom right.



The list of currently added columns is displayed below, where the order from top-to-bottom represents the worklist column order from left-to-right. If this is a new worklist and no columns have yet been added, this area will be empty.

- By default, each column name is set to the Patient Attribute or Compliance Measure name. However, a custom name can be used instead by entering it in to the corresponding *Display Label* field. This can be useful if you would prefer a shorter name or something specific to your local process.
- Columns are displayed in the worklist in the order they are added. However, the order can be changed by clicking the corresponding arrows ( ).
- Columns can be removed from the worklist by clicking on the corresponding red X icon ( ).

Important: Make sure that the *Patient Name* is included in your worklist. Without a patient name, worklists become difficult to use.

Saving the Worklist

To save the worklist, including all settings defined in the *Basic Settings*, *Filters*, and *Columns* tabs, click **Save**. Clicking **Cancel** will exit the worklist without saving any changes.

> **Note:** Modifying the settings of a worklist will reset the personalized refinements that users made on this worklist.

Completing Compliance Measures

While *Patient Attributes* included in a worklist will display the information contained in a patient record, each of the *Compliance Measures* added to a worklist require that an event occur in EQUICARE before they will be considered completed. A completed Compliance Measure will show the date of the most recent event of that type, or show a checkmark.

Below is a description of what action or event in EQUICARE applies to each Compliance Measure.

- **Activated:** A patient is activated.
- **Care plan printed:** One or more Care Plans have been printed from the Care Plan Printing page that in aggregate include all of the following pages: Treatment Summary, Follow-up, Care Team. NOTE: This column may cause performance issues in a worklist with a large number of columns and/or patients. If a worklist containing this column takes a long time to load, or does not load at all, remove this column from the worklist.
- **Education assigned:** A patient is assigned at least one education article.
- **Invited to Portal:** An Invitation Letter to the Patient Portal has been printed for a patient or authorized representative.
- **Notifications on - appointment:** Appointment notifications have been turned on for the patient.
- **Notifications on - questionnaire:** Questionnaire notifications have been turned on for the patient.
- **Notifications on - secure message:** Secure message notifications have been turned on for the patient.
- **Patient Received Secure Message:** A patient has been sent a secure message.
- **Questionnaire assigned:** One or more questionnaires have been assigned to a patient.
- **Questionnaire submitted:** The date of the last submitted or declined questionnaire. Hovering over it shows the questionnaire type and scoring details.
- **Questionnaire Next Due:** The date of the next questionnaire that will be due for the patient. Hovering over it shows the questionnaire type.
- **Medical Note:** The patient has at least one Medical Note of the type(s) configured for the column.
- **Next Appointment:** The date and time of the next upcoming appointment, the appointment type, and the provider.
- **Last Appointment:** The date and time of the last appointment, the appointment type, and the provider.
- **VDT completed:** The patient has viewed a CCDA.

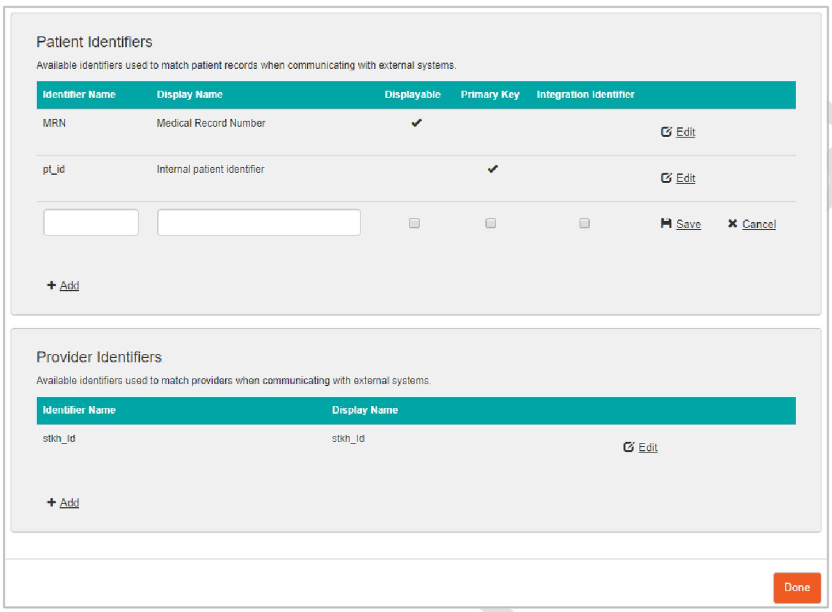
Manage External Systems

Manage External Systems feature is where Equicare is configured to communicate with external systems such as ARIA and MOSAIQ. This includes the ability to configure Identifier Equivalences (e.g. data labelled 'MRN' in one system is equivalent to data labelled 'pt_id' in another system). It is available within the **EQUICARE Admin** menu.

External Systems

To configure Equicare to communicate with an external system, you must know the details of how to connect with that external system. These details are typically known by the IT Administrator responsible for managing the external system. **Please contact the Equicare Services Team if you need to configure an external system but do not know the connection information**.

To manage the identifiers for an external system that has already been added to Equicare, click the **Edit Identifiers** button. Both Patient Identifiers and Provider Identifiers can be specified for the system.



Identifier Equivalence

If an identifier in an external system is the equivalent of an identifier in another system, the equivalence can be specified here by creating an equivalence rule.

1. Click **Add Identifier Equivalence**.
2. Place a check next to two or more External System ID options that are equivalent.
3. Click **Save**.

Multiple rules can be created as required.

Important: When creating Identifier Equivalences, it is required that all equivalent identifiers be within the same rule. For instance, Identifiers A, B, and C should all be in the same rule. **DO NOT** create two rules, one matching A with B, and another matching B with C.

Configure Communications Settings

The *Configure Communications Settings* page is available to administrators via the **EQUICARE Admin** menu.

Email Settings

This administrative space allows set-up configuration of e-mail messages which are used for appointment reminders. The system can be configured to use either SMTP or Exchange Online.

SMS Settings

This administrative space allows set-up configuration of cellular phone SMS. SMS text messages are sent via the 3rd party service Twilio. Twilio account information can be obtained from the EHI Services Team, and must be entered here.

Patient Notifications

The Patient Notifications tab allows the administrative user to set-up notification messages that go to patients. Once enabled, emails and/or SMS messages can be sent to patients and providers who wish to receive them. Patients can receive notifications about follow-ups, appointments, secure messages and/or questionnaires.

- Follow-up Notifications: Allows you to enable sending follow-up notifications.
- Appointment Notifications: allows you to enable sending appointment notifications and edit the content of the message.
- Secure Message Notifications: Alows you to enable sending secure messages for patient and/or providers.
- Questionnaire Notifications: Allows you to enable sending questionnaire notifications.
- Patient Notifications Worklist: Enables a worklist where users can send a notification to multiple patients at once, based on their upcoming appointments.

Note: Enabling a specific notification type does not start sending notifications to patients. This enables the option to be available to the patient, but the patient *still needs to explicitly make the choice* to turn the notification on for themselves. This is done in the Patient's User Account screen.

Provider Notifications

The Provider Notifications tab allows the administrative user to set-up notification messages that go to providers. Once enabled, emails can be sent to providers who wish to receive them when they receive a new secure message. By default, this feature is disabled in the system.

When provider notifications are enabled in the system, each Care Provider can be configured to receive notifications or not. By default this feature is disabled for all user accounts. An Equicare Administrator can turn on notifications for a user by editing their account via the *Manage Users* page.

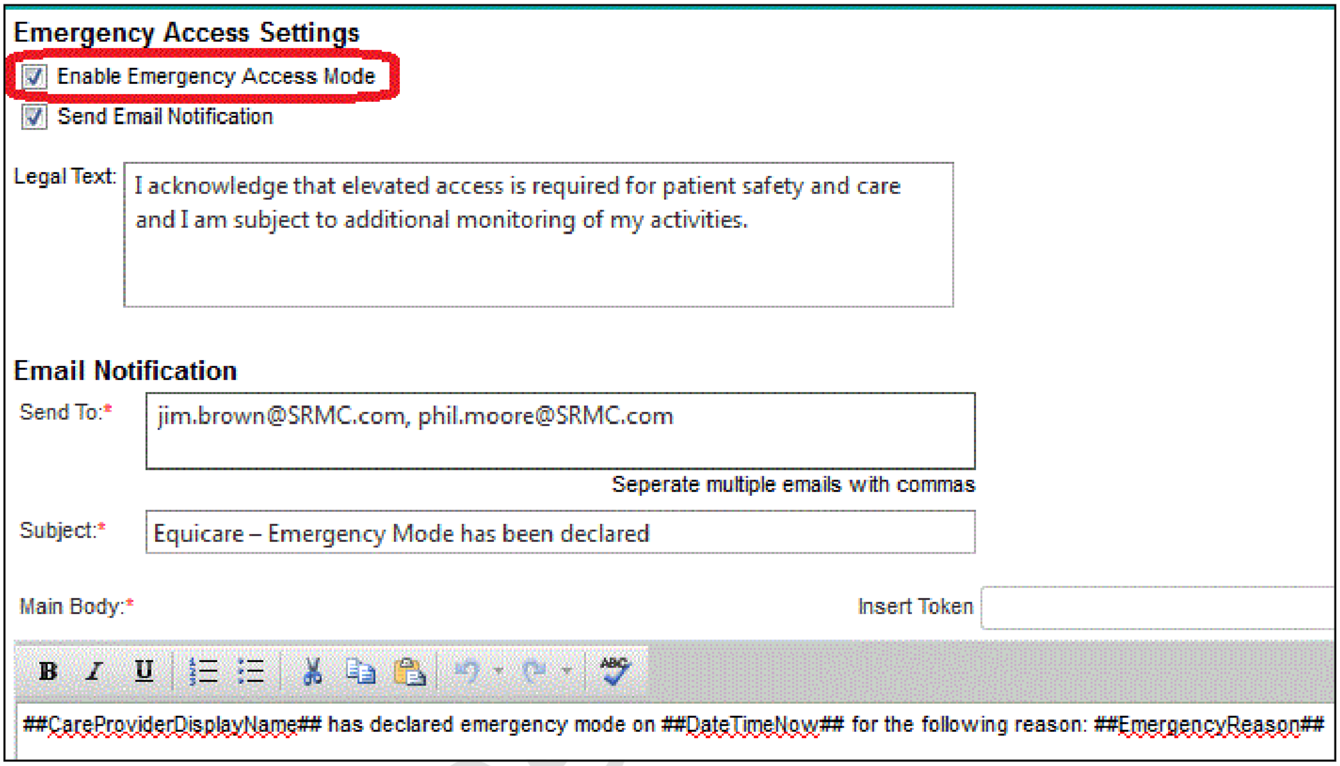
To enable Provider Notifications for a User:

1. Go to the EQUICARE Admin menu and select **Manage Users**.
2. Click the **Edit** link for the desired Care Provider user.
3. Select the **User Account** tab.
4. In the *Notifications* section, place a check in the box next to *Secure Messages (Email)*.
5. Click **Save**.

Note: Prior to enabling notifications for patients or providers, we strongly recommend that the templates associated with the notifications are reviewed and updated as required. See the Manage Templates section of this guide for more information.

Configure Emergency Access

The Equicare system can be configured so that a user who does not normally have access to certain patient information can grant themselves access in an emergency. When Emergency Access is invoked by a user, they will have access to all patients within the facilities where they work.
This feature is enabled with a checkbox in the configuration screen. Check the box to activate the feature and other associated options. Note: this is a system wide setting and not configurable by facility.



Once enabled, the Administrative user can set-up email notifications so that a security or privacy user is notified if the emergency access feature is invoked. Multiple users can be notified if necessary.

The email message that is sent to the user can be configured with tokens so that it can include information that may be important to the security/privacy user. This would be information such as the name of the care provider who invoked emergency access and the time it was invoked.

The increased level of access granted to the user through emergency access will end when the care provider ends the session in which they invoked emergency access. A care provider could then invoke emergency access again if subsequently needed.

Configure Look-up Values

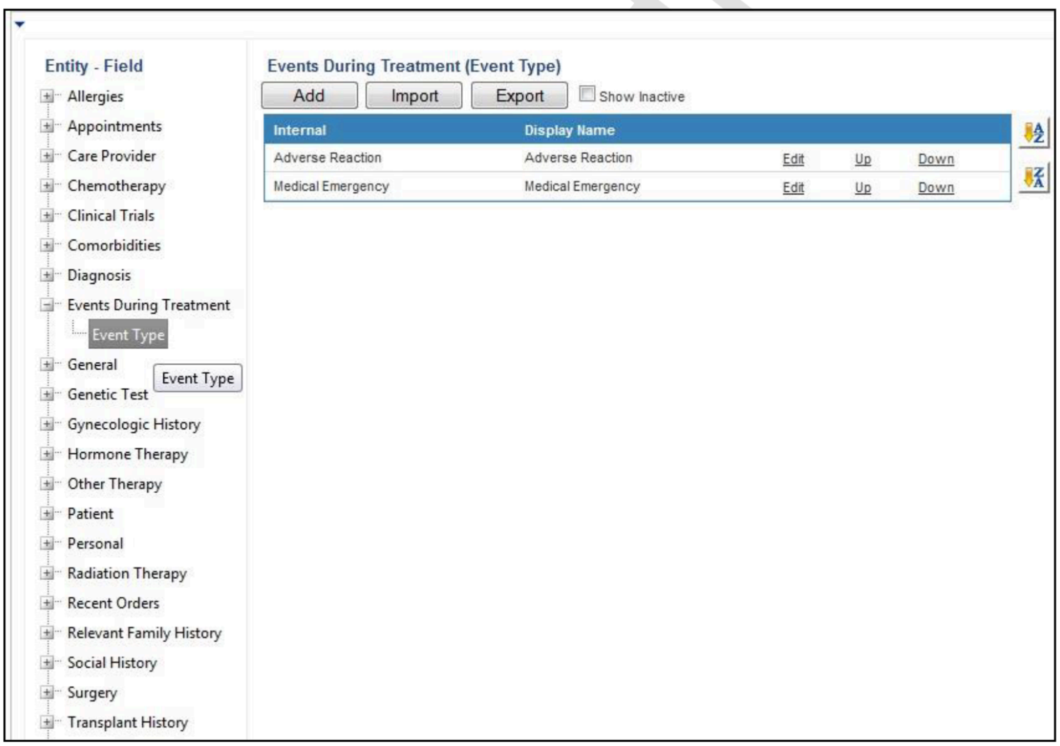
This administrative space allows the administrator to configure many areas of the Equicare system.

The fields available for modification and where they are located within Equicare are listed here:

Entity in EQUICARE Admin>Manage Lookup Value	Location of field(s) in Equicare

Allergies	Treatment Summary
Appointments	Appointments
Care Provider	Manage Users
Chemotherapy	Treatment Summary
Diagnosis	Treatment Summary
Encounter	Chart
Events during treatment	Treatment Summary
General (includes Delay of Service, Ethnicity, Out of Network and Race)	Various locations
Genetics	Treatment Summary
Gynecologic History	Treatment Summary
Hormone Therapy	Treatment Summary
Initial Clinical Finding	Treatment Summary
Patient	Registration, Care Management
Radiation Therapy	Treatment Summary
Relevant Family History	Treatment Summary
Social History	Treatment Summary
Surgery	Treatment Summary
Transplant History	Treatment Summary
Tumor Marker	Treatment Summary

To edit one of these fields, highlight the entity. The values associated with the field will be displayed, if any exist.



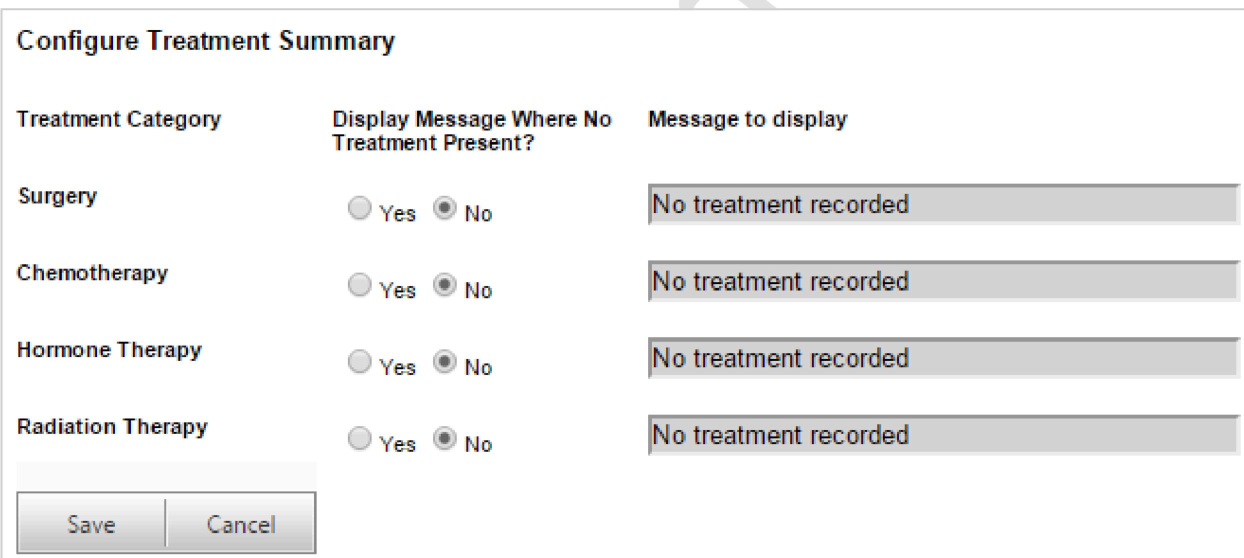
Clicking the add button allows you to create a new entry. Click the save button to add it to the list.

There is an edit option with each entry which will allow you to modify the name or make an entry inactive if needed.

The Import and Export functions allow you to deal with lists of items. A list of items can be imported as a csv file (create with Excel) or exported as a csv file.

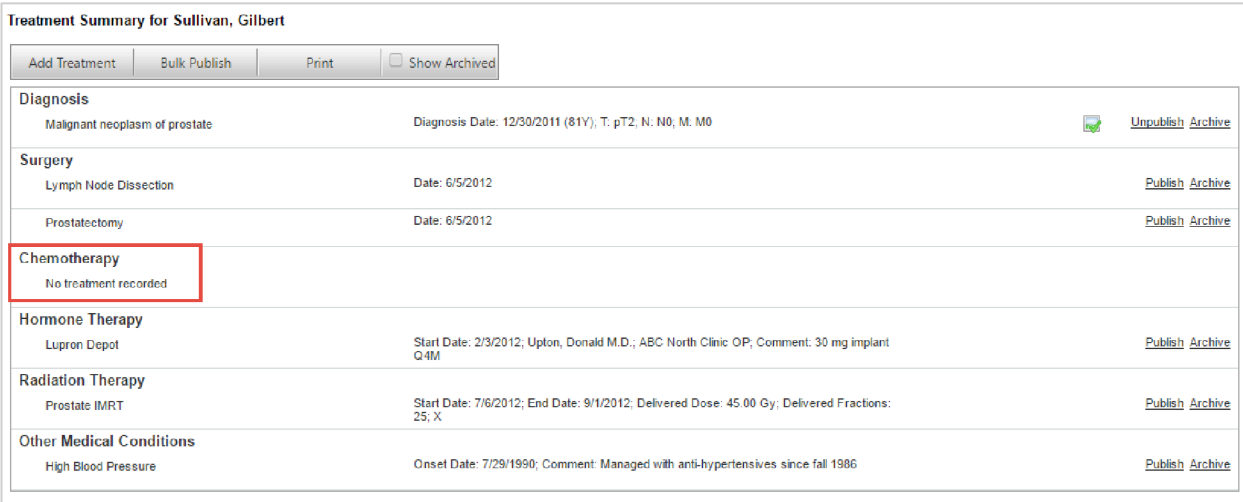
Configure Treatment Summary

An EQUICARE Administrator has the option to enable the display of a message in a patient's treatment summary when no treatment has been recorded for *Surgery*, *Chemotherapy*, *Hormone Therapy*, and *Radiation Therapy*. The settings are accessible by going to the *EQUICARE Admin* menu and clicking **Configure Treatment Summary**.



Setting an option to **Yes** allows the message to be edited. Click **Save** to save any changes.

If an option is enabled and no treatment has been recorded for a patient, the category and message will appear in the patient's Treatment Summary.



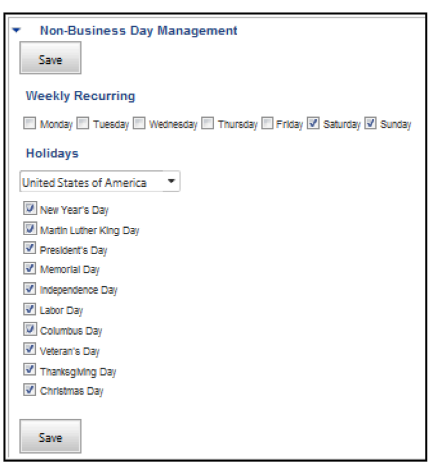
Configure Multi-Factor Authentication

An Equicare Administrator user can navigate to **EQUICARE Admin > Configure Multi-Factor Authentication** and toggle the Multi-Factor Authentication ON or OFF. Note that this does not enable or disable the feature for the system. When toggled ON/OFF this sets the default MFA setting for new users (during the Add User workflow) and re-applies the setting for all existing user accounts in the system. If needed, each individual user account can be configured separately.

Note that changing this setting will overwrite the MFA setting for any user accounts that were individually configured. However, if a user account had MFA enabled and the user had completed MFA Setup, disabling MFA for the user will not erase the setup information. If the user account later has MFA enabled again, the preexisting setup information will still be in effect.

Configure Non-Business Days

The holidays and operating dates of the clinic can be managed in this screen. The days of the week that the clinic is open can be indicated in the 'Weekly Recurring' and holidays off work can be set.



Establishing these days will result in reports being more accurate as well as working with the Delay of Service intervals.

Configure MU CCDA

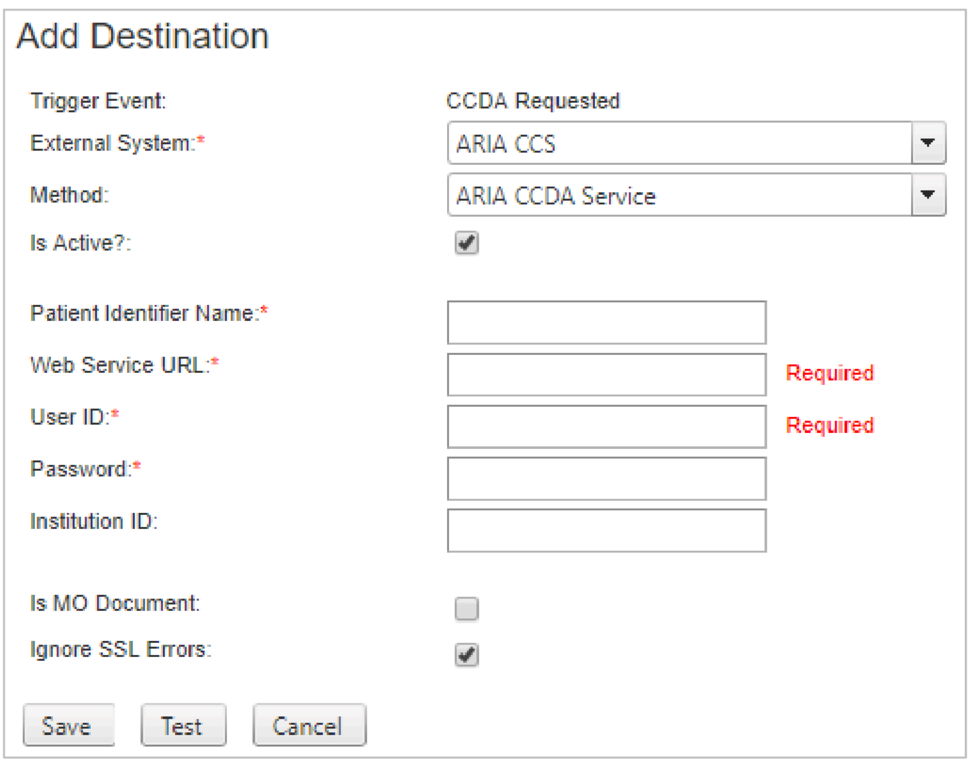
Equicare can be used to support features of Meaningful Use. In order to allow patient access to Consolidated Clinical Document Architecture (CCDA), the Equicare system must be configured. The settings available are:

- **None:** There will be no ability for the patient to request/receive CCDAs. Selecting None implies that Equicare is not being used to certify for Meaningful Use for these measures.
- **Stage 1 and 2 - 2015 Edition:** Refers to Meaningful Use Stage 1 and 2 following the 2015 Edition. When the Equicare system is configured for this, CCDAs can be retrieved by the patient from an identified External System. The patient has access to them through the Health Information Summary area and the Recent Office Visits area. Patients are able to view, download and transmit CCDAs.

Configure the External Systems

In order to retrieve/receive CCDA's, the external system must be identified and recognizable to the Equicare system. External systems are set up by an Equicare Service technician.

Once the external system is set up in Equicare, it can be added in the External Systems area of the Configure MU CCDA screen. In the External Systems area, click the 'Add' button. A new window opens.



Select the external system to be used as the source of the CCDA . Enter the required information for the web service (Web Service url, User ID, Password).

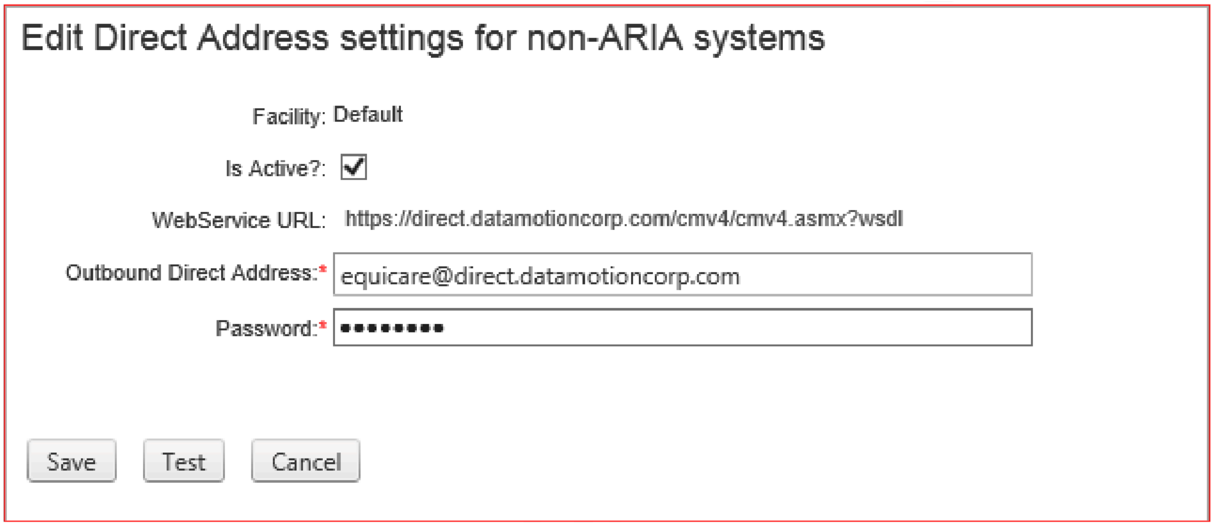
The connection can be tested using the 'Test' button. Otherwise click the 'Save' button to add the external system.

Configure the CCDA Transmission For Non-ARIA OIS

In order for an Equicare system connected to a non-ARIA OIS to transmit a patient's CCDA, the system must be configured to access the Direct network which provides secure transmission of Personal Health Information. Note that this step is not required to receive CCDA's from a non-ARIA system. It is only necessary to allow the patient to transmit a CCDA to another care provider.

Each facility can have its own outbound Direct address or a group of facilities can share a single outbound Direct address. All transmissions will show the Direct address as the sender so a single outbound Direct address may not be desirable for a group of facilities. Direct addresses are created by the Equicare Service Technician.

Once a Direct address is created, it must be added to the settings for the non-ARIA OIS. This is done in the 'Transmit CCDA' section. Click on the 'Edit' link for a given facility. A new window opens.



Enter the required information for the selected facility.

Note that the "WebService URL" field is auto-populated and is required to allow the configuration of the selected facility. The "WebService URL" is set up by an Equicare Service Technician. If it is not set, a warning message is shown.

The connection can be tested using the 'Test' button. Click the 'Save' button to save the configuration for the selected facility.

Configure Secure Messaging

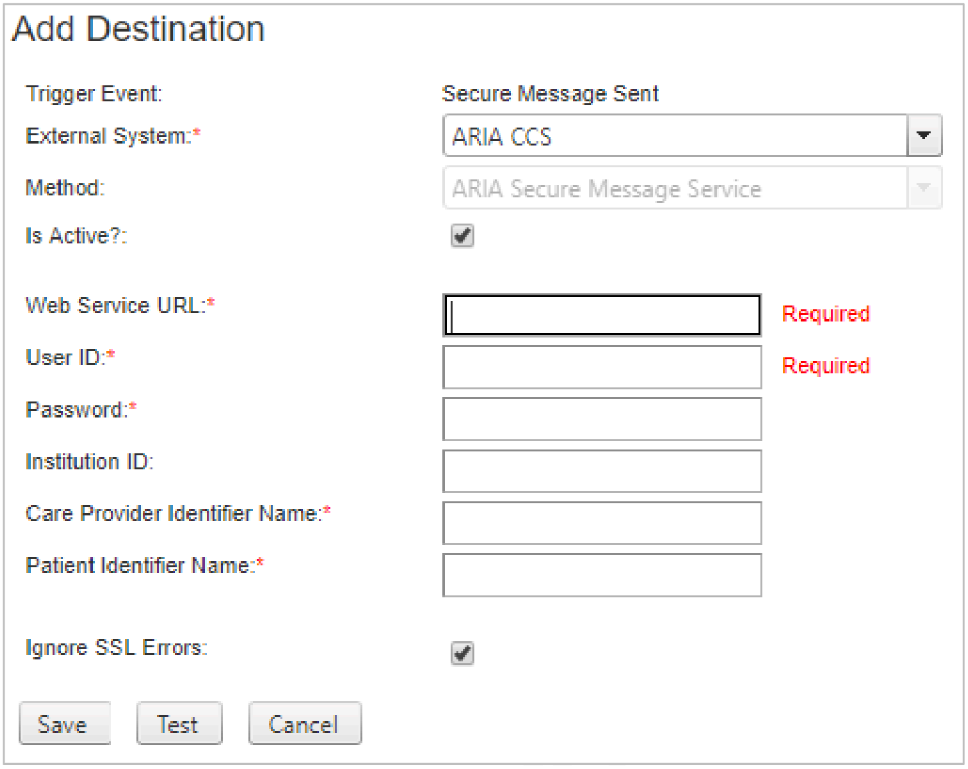
Equicare can be used to support features of Meaningful Use. In order to allow enable Secure Messaging between the Equicare system and an external system, enable the Secure Message feature. Enabling the feature makes the My Messages icon and menu item available to the patient.

Configure the External Source

In order for the patient to send a secure message, the external system must be identified and recognizable to the Equicare system. External Systems are set up by an Equicare Service technician in the 'External Systems and Identifiers' area.

A system identifier name can be set up for display to the patient. This is shown when more than one external system is available for a CCDA request. An example would be when a Radiation Oncology and Medical Oncology system are available for CCDA requests.

Once the external system is established, it can be used to support Secure Messaging. In the External Systems area, click the Add button. A new window opens.



Select the External System to be used for Secure Messaging. Enter the required information for the web service (Web Service url, User ID, Password).

System identifier names for the patient and the clinician should NOT be set-up for this external system. These identifiers are for future use. They currently do not display to the care provider or patient.

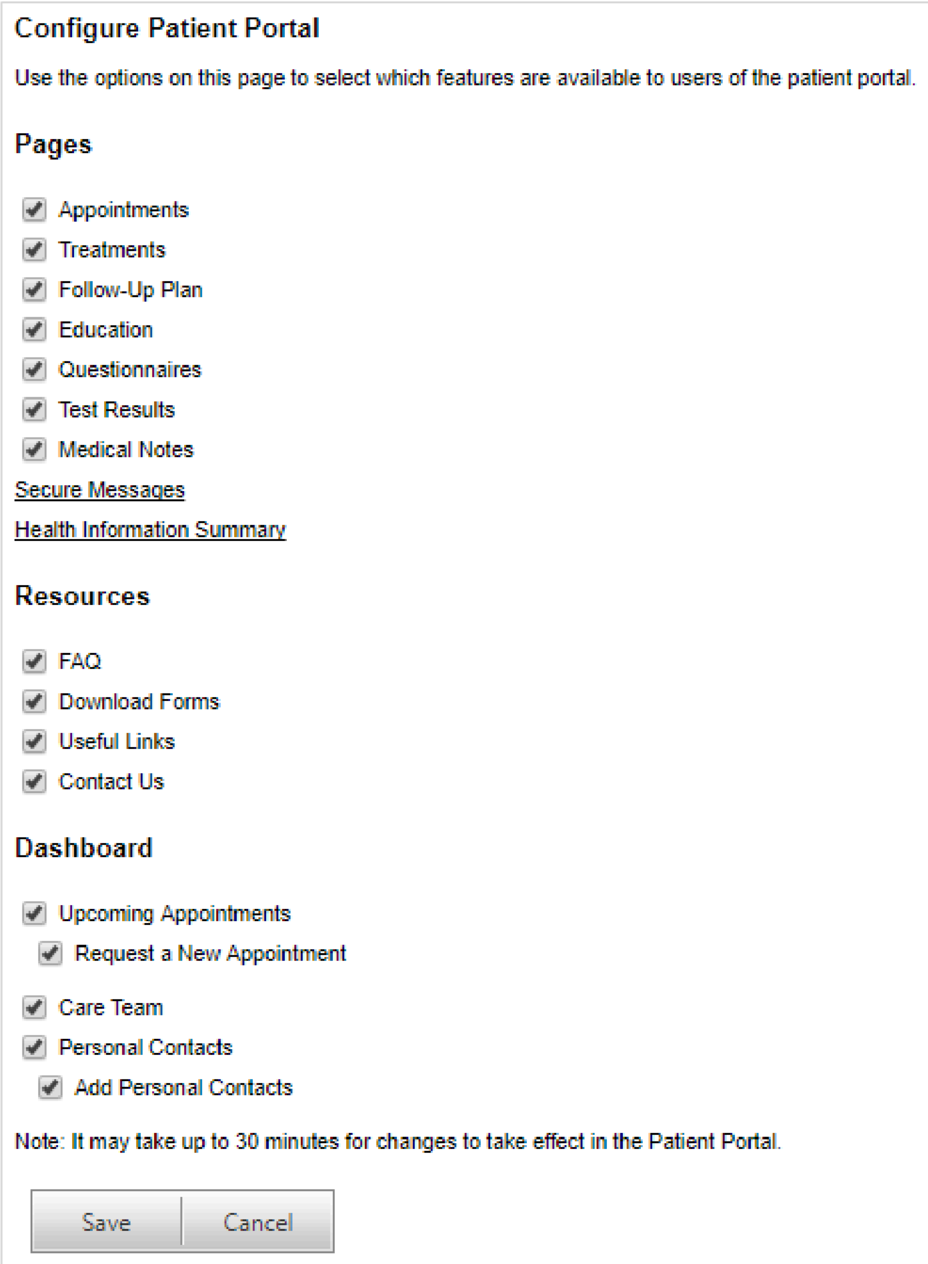
The connection can be tested using the ‘Test’ button. Otherwise click the ‘Save’ button to add the external system.

Configuring Single Sign-On

The single sign on feature enables patients to access the Equicare patient portal directly from within an EPIC enterprise portal. Configuring single sign-on requires that steps be taken in both Equicare and in EPIC. Contact an Equicare Service technician for assistance.

Configure Patient Portal

The Configure Patient Portal page allows administrators to control the features available to users of the Patient Portal. It can be accessed by going to the *EQUICARE Admin* menu and selecting **Configure Patient Portal**.

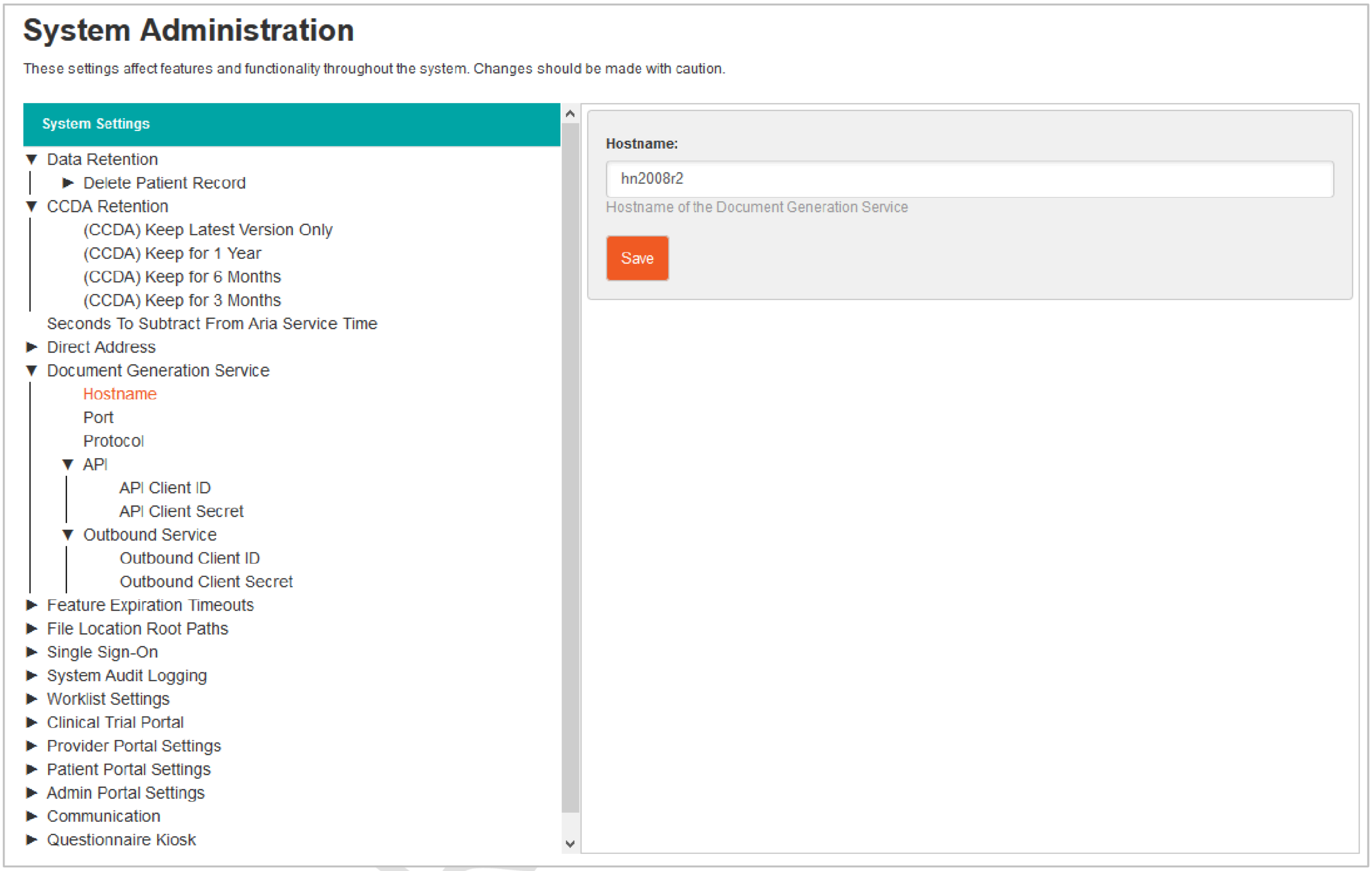


Features that are enabled (checked) are available in the Patient Portal. To prevent a feature from appearing in the Patient Portal, uncheck its box and click **Save**. Note that it may take up to 30 minutes for changes to take effect.

- **Pages:** This section controls display of the main pages of the Patient Portal. Both Secure Messages and Health Information Summary have their own configuration pages and cannot be enabled/disabled on this page. Click their links to access their configuration pages.
- **Resources:** This section controls display of the Resources pages available in the Patient Portal main menu: FAQ, Download Forms, and External Links.
- **Dashboard:** This section controls display of the features available on the Dashboard. The Dashboard itself cannot be disabled. Enabling the Request a New Appointment feature requires that the Upcoming Appointments feature is enabled, and enabling the Add Personal Contacts feature requires that the Personal Contacts feature is enabled.

Configure System Administration

The Configure System Administration page gives administrators access to many of the key system settings. Settings are organized into a simple tree directory. Changing a setting simply involves selecting the option, typing the correct information in a field and clicking *Save*.



IMPORTANT:

The settings available on the *Configure System Administration* page should be used with extreme caution. Some settings, if misconfigured, could prevent some or all EQUCARE features from functioning properly. Any questions about a settings should be directed to the EHI Services Team prior to making changes.

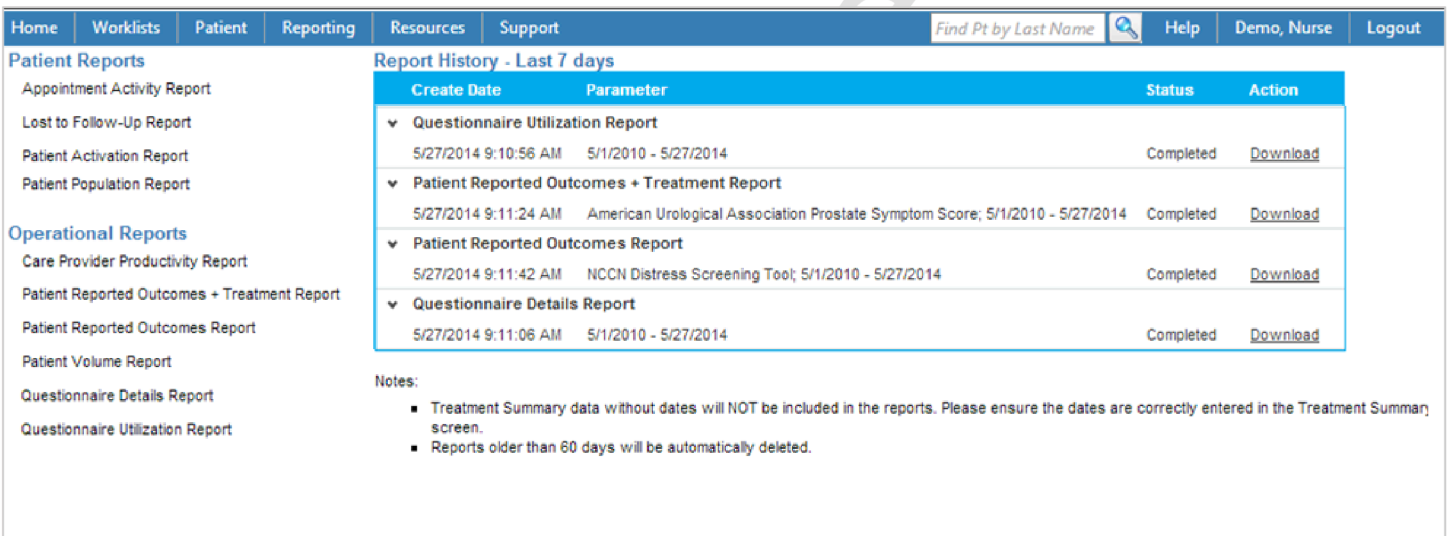
Lesson 3: Reporting

Users with the **Equicare Analytics** permission are able to generate reports from activities or data collected in EQUICARE. For users with access, reports are generated in .csv files that can be opened in Excel or other software applications.

> **Note:** Due to security, users are not able to view reports generate by other users.

Operational Reports

Operational reports are those reports related to actions taken in EQUICARE. Operational reports are available in three categories: those related to patients, those related to operations, and those which allow advanced function. Reports begin generating as soon as they are requested, but may take several minutes to complete if there is a large amount of data to compile. Reports that take several minutes will have a status of *Pending*, and will update to a status of Completed when ready to download. However, to see the status change you will need to refresh the page using your browser, or by pressing F5 on your keyboard.



More details about the fields included in these reports are described in Appendix F.

The following reports are currently available in EQUICARE:

- **Appointment Activity Report:** Lists all patients that have appointments within a specified time frame. This report can easily be sorted by appointment type to determine the number of patient appointments of a certain type. It is also useful for identifying patients with future appointments.

- **Patient Activation Report:** Lists the patients that were activated in EQUICARE for a specified period. This report will give a broad overview of the activity of the Navigation and Survivorship programs in a clinic.

- **Patient Population Report:** Lists active and inactive patients for a specified date. This allows the customer to manage their licensing agreement by understanding how many active patients they have in the system as well as providing a method to evaluate their active patient population by treatment or diagnosis information.

- **Care Provider Productivity Report:** Summarizes the activity of Care Providers for a specified period of time, focusing on items such as activation of patients, problem identification and Equicare content usage.
- **Patient Follow-up Guideline Assignment Report:** Lists all patients who have a specific follow-up template assigned. This is useful for identifying groups of patient who may be impacted by surveillance guideline changes.
- **Patient Reported Outcomes + Treatment Report:** Lists all patients that have completed a specific questionnaire template and their answers to the questionnaire. Includes patient treatment information and patient demographics.
- **Patient Reported Outcomes Report:** Lists all patients that have completed a specific questionnaire template and their answers to the questionnaire. Does not include treatment information.
- **Patient Volume Report:** Provides information on the number of patients activated within a specified period of time, broken down by category. Category choices are primary disease site, race and ethnicity. Removing disparities in treatment based upon these categories is a major focus of the Department of Health and Human Services.
- **Questionnaire Details Report:** Provides status information about individual patients and the questionnaires they have been assigned to them.
- **Questionnaire Utilization Report:** Provides a summary of questionnaires assigned to the patient population. This report is useful in understanding which questionnaires are being assigned and how often they are completed.

Patient Audit Report

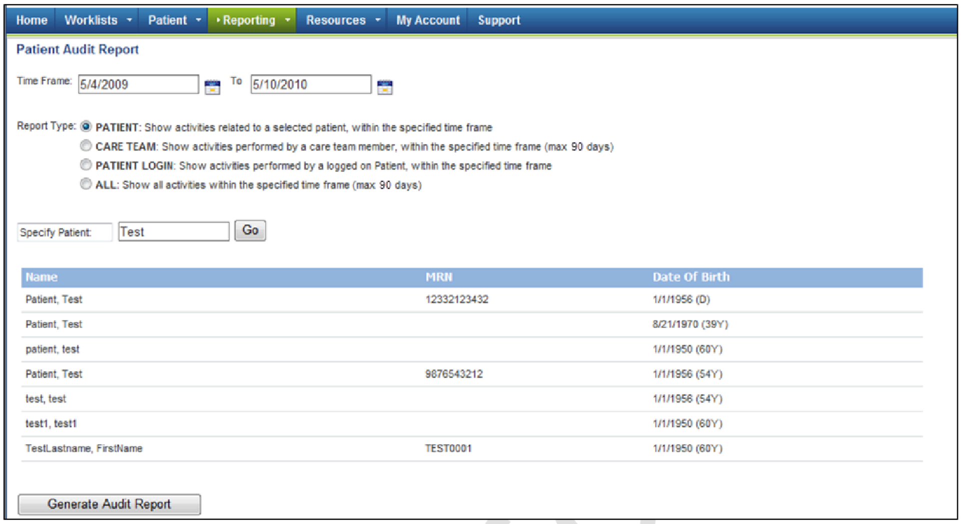
These audit reports allow the user to track activity that has taken place within Equicare. This report is accessible from the Reporting menu and allows the user to define the appropriate timeframe and choose from one of four report formats:

a. Patient: all activities related to a specified patient
b. Care Team: all activities performed by a specified care team member within a specified timeframe (max 90 days)
c. Patient Login: all activities performed by a patient in EQUICARE
d. All : all activity within EQUICARE for the specified timeframe (max 90 days)

To create an audit report:

1. Select Audit from the Analytics item on the menu bar.
2. Define the appropriate timeframe for the report. Time frame restrictions are identified in the report description where applicable.
3. Select the appropriate report type.
    1. Patient report: type in patient first or last name and select “Go” to find matching patients. Select the appropriate patient from the results.

2. Care Team report: type in the care provider's first or last name and select "Go" to find matching care team members. Select the appropriate individual from the results. This report is limited to seven days of activity.
3. Patient Login report: type in patient first or last name and select "Go" to find matching patients. Select the appropriate patient from the results.
4. All: this report is limited to seven days of activity.



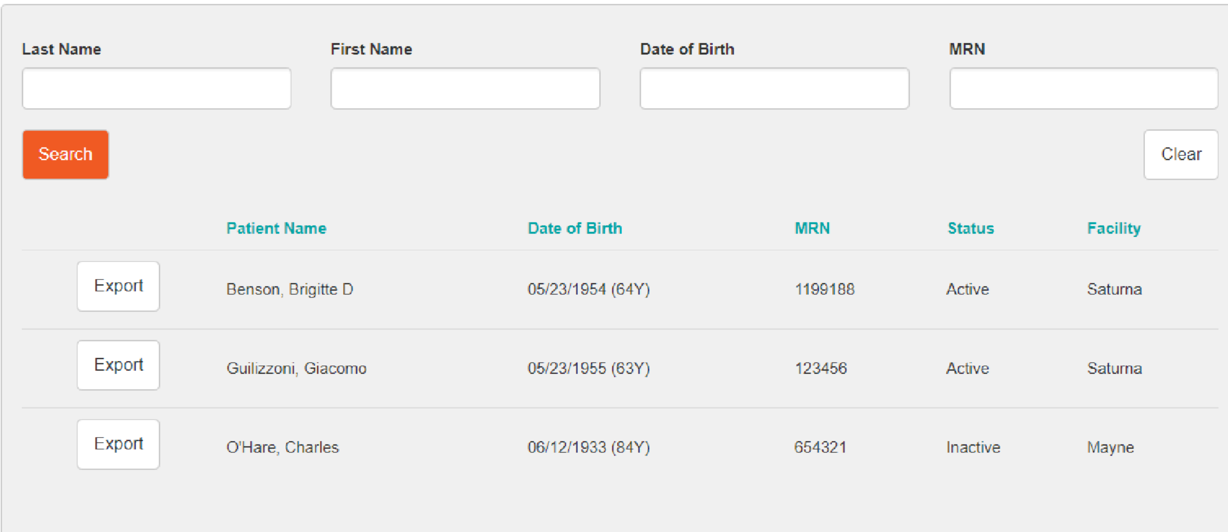
4. Select Generate Report. The report will generate immediately and you may choose to open in an Excel spreadsheet or save the report.

Note: Audit reports will only allow the user to report on patients or care providers at the facilities where they work.

Electronic Health Information Export

Users with the **Equicare Analytics** permission are able to export patient data. More information about the formatting and contents of the export file can be found at https://equicarehealth.com/ehiexport/.

To export patient data, go to the *Analytics* menu and select **EHI Export**. Users can search by name, Date of Birth, and/or MRN, then click the **Export** button for the appropriate patient.



A file will be generated which can be downloaded via the browser. These files can be opened using a Word Processor application.

Exporting a Patient Population

If an export of a Patient Population is required, please contact the Services Team for assistance.

Appendix A: User Permissions Matrix

This table shows the patient access functionality available to different user permission settings

		Read Only	**Limited Read & Write**	**Read & Write**
Worklists:				
	My Alerts	N	N	Y
	My Follow-ups	N	N	Y
	My Patient	Y	N	Y
	Patient Search	Y	Y	Y
	Compliance Worklists- grid	Y (r)	Y (r & w)	Y (r & w)
	Compliance Worklists- detail	Y (r)	Y (r & w)	Y (r & w)
Screen:				
	Patient Alerts	N	N	Y
	Registration	Y (r)	Y (r & w)	Y (r & w)
	Appointments	Y (r)	Y (r & w)	Y (r & w)
	Navigation Summary	Y (r)	Y (r & w)	Y (r & w)
	Treatment Summary	Y (r & p)	Y (r & p)	Y (r & w)
	Follow-up Plan	Y (r & p)	Y (r & p)	Y (r & w)
	Education Materials	Y (r & p)	Y (r & p)	Y (r & w)
	Questionnaires	Y (r)	Y (r & w)	Y (r & w)
	Chart	Y (r & p)	Y (r & p)	Y (r & w)
	Test Results	Y (r & p)	Y (r & p)	Y (r & w)
	Medical Notes	Y (r & p)	Y (r & p)	Y (r & w)
	Care Management	N	Y (r & w)	Y (r & w)
	Care Plan Printing	N	Y	Y
	Patient User Account	N	Y	Y
	Operational Reports	N	Y	N*
	Patient Audit Report	N	Y	N*
	Knowledge Base	Y	Y	Y
	FAQ	Y	Y	Y

r - read only
r & p – read and print
r & w – read and write
* This user can be granted access to reports with the additional permission “Equicare Analytics”.

Appendix B: Import User File Format

Importing users is useful when adding a large number of users to the system. For example, if you start a prostate survivorship program, you may want to add a list of urologists to the system so they are able to view the patient's treatment record. In order to do this efficiently, you can create a list of users in an excel spreadsheet and then import the file to the EQUICARE system.

The information that can be imported to EQUICARE is as shown below:

Column Name	Field	Is Required?	Populated From ARIA	Notes
Username	Username	Only if "Login Enabled" is "Yes"	No	
FirstName	FirstName	Yes	Yes	
LastName	LastName	Yes	Yes	
Title	Title	No	Yes	
NPI	NPI	No	Yes, if user has one.	
Internal Phone	work phone	No	Yes	
Internal Phone Extension	PrivatePhoneExt	No	No	
Internal Email	Email	No	Yes	Must be a valid email address format
Address	Address1	No	No	
Address2	Address2	No	No	
Address3	Address3	No	No	
City	City	No	No	
State	State	No	No	Must exist in ECS/APP
Country	Country	No	No	Must exist in ECS/APP
ZipCode	ZipCode	No	No	String value, 55555
Public Email	Email	No	No	Must be valid email address format
Public Phone	Phone	No	No	String value, (555) 555-5555
Public Phone Extension	PublicPhoneExt	No	No	
Public Fax	Fax	No	No	String value, (555) 555-5555
Suffix	Suffix	No	No	
Login Enabled	Account Enabled	Yes	No	Yes/No
Initial Password		No	No	Must follow password rules established in ECS/APP
Photo Filename	OriginalFileName/ ThumbnailFilename	No	No	File name
Is Active?		No	No	Yes/No - Yes, user is an active CP in ECS (can be found in provider lists); No, user is a deactivated user in ECS
Permissions	RoleID	Yes if Login is Enabled	No	One of the following (no quotes): "Read & Write", "Limited Read & Write",

				"Read Only"
Equicare Administrator		No	No	Yes/No - Yes, user has Equicare Administration privileges; No, user does not
Analytics in My Facilities		No	No	Yes/No - Yes, user has Analytics privileges; No, user does not
All access to patients at My Facilities		No	No	Yes/No - Yes, user has Access to all patients in the facilities they belong to; No, user has standard access through care team/workgroups
Institution	Institution	No	No	Institution in system – institution specified must exist in ECS/APP.
Auto Add to CareTeam when adding to a referral	IsAutoAddToCareTeam Enabled	No	No	Yes/No
Out of Network	IsOutOfNetwork	No	No	Yes/No
Direct Address		No	Yes	**Reserved for future use.** Must be a valid direct address format (same as email format)
Enabled for Secure Messaging		No	Yes	Yes/No
External System		Yes if External System Identifier is specified	Yes	Name of external system - should map to an IFSystemName
External System Identifier		Yes if External System is specified	Yes	Care provider's identifier in external system
Workgroup		No	No	Pipe (|) delimited list. Workgroups must exist in ECS/APP.
Facility		Yes if Login is Enabled	No	Pipe (|) delimited list. Facilities in ECS/APP must be active.

A template is available from an Equicare Service technician. Please request one from your representative.

Once the information has been collected in the excel worksheet, go to File>Save As. Save the file as a .CSV file. The file is now ready to be used with the Import Users option.

Appendix C: Internet Browser Options

Browser Compatibility

- Internet Explorer: Latest Release.
- Microsoft Edge: Latest release.
- Chrome: Latest release.
- Firefox: Latest release.
- Safari (Mac): Latest release.
- Safari (iPad): Latest release supported for Patients and Clinical Users only. Equicare Administration is not supported on the iPad.

Browser Spellchecking

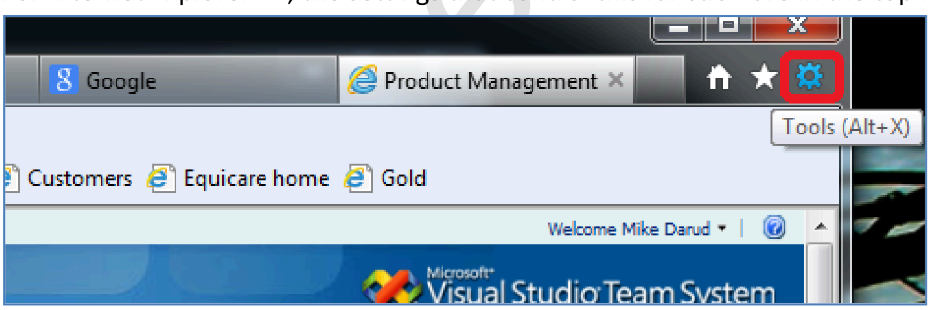
Some modern browsers include a built-in spellchecking feature, but not all. For those that do not, there is often a free browser plugin that can be downloaded and installed that will provide a spell check. For more information, visit your browser maker's website and explore their plugins area.

Tabs and Windows

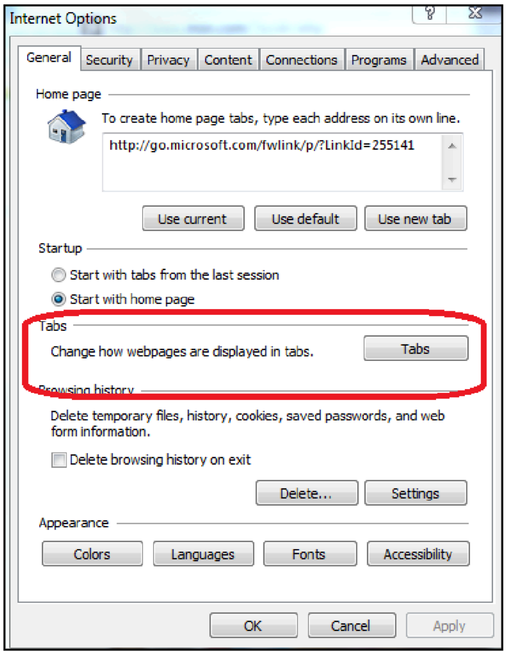
The settings of the internet browser may impact the user experience, particularly when accessing the Equicare system from ARIA. The main impact of the browser setting for Equicare is whether the Equicare application opens as a new browser window, as a new tab in a current window or whether it opens in an existing window and moves away from existing page.

Most hospitals and clinics will use Internet Explorer. However, for other browsers the steps are similar to the below:

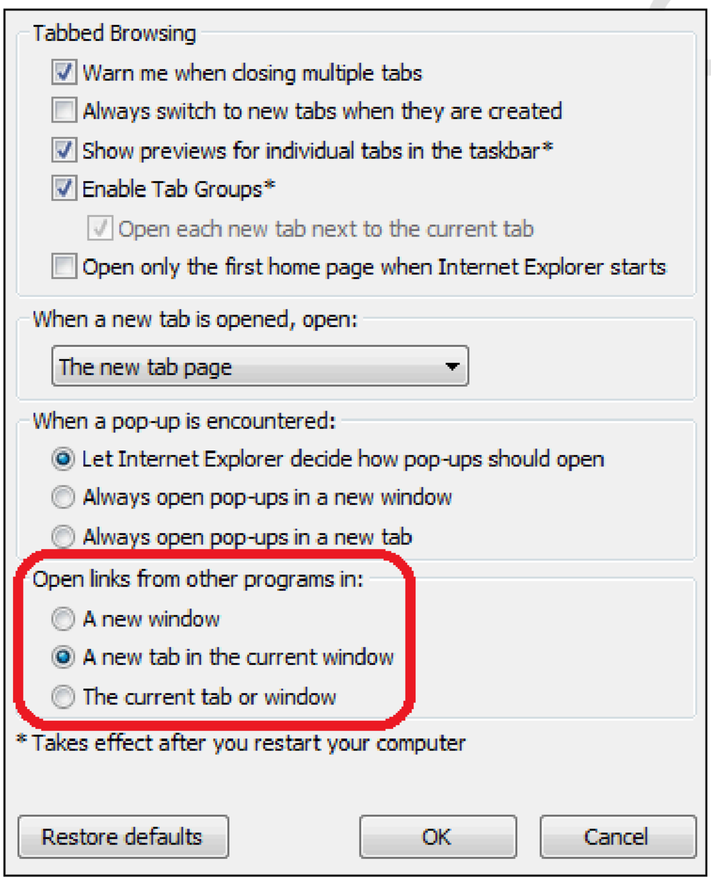
1. For Internet Explorer 11, the settings that control this function are in the top right corner under ‘Tools’.



2. Click on the **Tools** icon to see a menu. In the menu, choose **Internet Options**.
3. In the Tabs section (circled below), click the ‘Tabs’ button.



4. A 'Tabbed Browsing Settings' window opens. The relevant settings are in the section highlighted below.



The option for opening links from other programs in a new window will cause a new Internet Explorer browser window to open to display the selected Equicare screen. Opening more than one link from ARIA will cause more than one window to be open. To select between the windows, the user will have to use features of the Windows environment such as the taskbar.

The option for opening links from other programs in a new tab in a current window will cause a new tab in the Internet Explorer browser to open to display the selected Equicare screen. Opening multiple links will cause multiple tabs to be generated in one browser window. The user will have to click on a tab to switch between views.

The option for opening links from other programs in the current tab or window will cause the current tab/window to be updated with the Equicare screen. Only one Equicare screen will ever be displayed. This is the simplest viewing option.

Appendix D: Setting Navigation Menu Delay

It is possible to modify the delay for the opening and closing of menus on the Navigation bar. To do this, access the file at the following location:
C:\EquicareCS\Website\Portals_default\Skins\Equicare

Note, the location of this file may be different depending on the configuration of the Equicare system.

Once the file has been located, open it with an editor such as Wordpad.

Find the line `<!-- Navigation bar -->`. The code here provides control for the menu's on the Navigation bar.

Find the options for ExpandDelay and CollapseDelay. The number associated with these options are in millisec so entering a value of "500" causes a delay of 0.5 seconds. If changes are made, save the file. Refresh the Equicare screen to see the change in menu delay. Note that this setting affects all users in the system including patients.

Appendix E: Configuration of the Patient Sign-up Process

The configuration options for the patient sign up process are only accessible by EHI Administrators. If you would like to change these settings, please contact the Equicare Services team.

The Equicare CS system allows for configuration of the patient sign up process. The options that your institution chooses for Patient Sign-up should reflect ease of use for the patient as well as consideration of the protection of patient's health care information.

- **Password Requirements:** These options determine the requirements for creating an account password on the Patient Portal. For example: Minimum number of characters, minimum number of numerals, number of special characters.
- **Verification Item:** This is used to ensure that the patient has an additional piece of security information upon sign-up. The institution can configure which item to use as a 'verification field'. The options are: PIN, Social Security Number, and/or MRN.

Appendix F: Report Details

Operational Reports

Care Provider Productivity Report

This report provides the data needed to understand the productivity of Care Providers at the institution. All values are calculated within the user-specified date range.

The data includes care providers who had specific types of activities within the specified date range. Care providers who had one or more of the following activities within the date range are included in the report:

- Activated one or more Patients
- Assigned one or more Follow-up to one or more patients
- Assigned one or more Education Article to one or more patients
- Assigned one or more Questionnaire to one or more patients
- Recorded one or more Problems
- Recorded one or more Referrals
- Recorded one or more Chart Notes (includes "Encounters" and "Assessments")
- Recorded one or more Appointments (appointments that were created directly in Equicare by users.)

Field specific details:

- "Problems" include Active and Resolved problems.
- "Referrals" include Active and Archived referrals.
- "Chart Notes"
  - include "Encounters" and "Assessments"
  - include items with Final status only.
- "Appointments" include appointments that were created directly in Equicare by users.
- "Education Articles" include Active and Archived articles.

Questionnaire Details Report

This report provides details about each questionnaire assigned to individual patients. The report shows all questionnaire templates assigned to patients and their current status (assigned, completed, declined, and missed).

Questionnaire Utilization Report

This report provides an overview of the questionnaire usage for all templates. For each questionnaire template, information on the following items are provided:

- # assigned
- # completed (includes "Addressed")
- # declined
- # missed
- % of patients assigned
- % of patients completed (includes "Addressed")
- % of patients declined

- % of patients missed
- % assigned Qs completed by Due Date

Appendix G: Equicare Links from ARIA

ARIA RO and MO can be configured so that links to EQUICARE are available from within ARIA. These links help to streamline the workflow process between the two patient management systems.

There are 2 methods for making links between Equicare and ARIA.

Method 1: Shortcuts
A shortcut menu can be created in ARIA RO and MO. In order to establish the shortcuts from ARIA to Equicare, some configuration steps must be completed by an Equicare Service technician and a customer IT support person. If you want to create links from ARIA, contact an Equicare Service technician to carry out the configuration steps.

Shortcuts require a label and a path. The label will appear in the ARIA application and should be understandable to the user who is accessing the Equicare function. The path is needed to link the ARIA application to the correct screen in Equicare and deliver patient information.

For each path, tokens are used to pass information to Equicare. The following tokens are available.

- ?uid: The User ID token provides the User ID of the user who is currently logged on to ARIA. This value is automatically entered into the ECS/APP login screen. The user must then enter their password to login to ECS/APP.
- &ptid: The patient ID token provides the internal ID of the patient currently in context in ARIA. This will establish the patient context in ECS/APP.
- &sid: This token provides the external system name so ECS/APP understand which system is trying to communicate (e.g. “ARIA RO”).
- &inlineprinting=true: This token is only necessary for ARIA MO where the web browser is embedded. This is not necessary if the user will open ECS/APP with default browser.
- &d: This token gives the name of the page within ECS/APP that the user wants to navigate to (e.g. “TestResults”)

Note that tokens will be resolved at run time.

Suggested labels and paths are as follows:

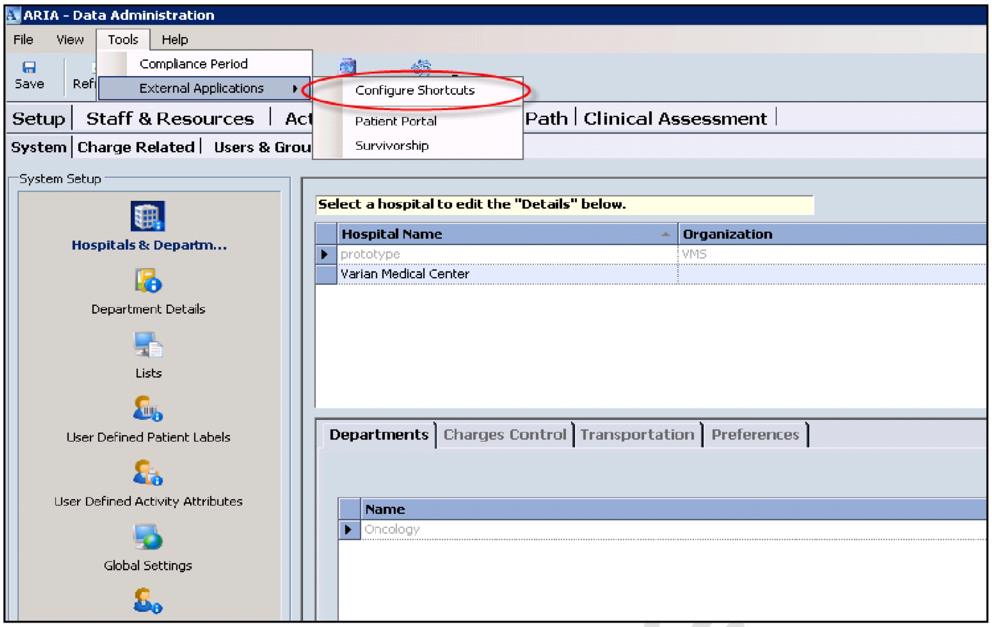
Suggested Label (max 20 characters)	Path
Activate Patient	http://<Equicare web server>/ActivatePatient.ashx?uid=<userid>&ptid=<pt_id>&sid=ARIARO
Manage Patient	http://<Equicare web server>/ActivatePatient.ashx?uid=<userid>&ptid=<pt_id>&sid=ARIARO&inlineprinting=true&d=ManagePatient

Publish Test Results	http://<Equicare web server>/ActivatePatient.ashx?uid=<userid>&ptid=<pt_id>&sid=ARIARO&inlineprinting=true&d=TestResults
Publish Documents	http://<Equicare web server>/ActivatePatient.ashx?uid=<userid>&ptid=<pt_id>&sid=ARIARO&inlineprinting=true&d=MedicalNotes
View Questionnaires	http://<Equicare web server>/ActivatePatient.ashx?uid=<userid>&ptid=<pt_id>&sid=ARIARO&inlineprinting=true&d=Questionnaires
Assign Questionnaire	http://<Equicare web server>/ActivatePatient.ashx?uid=<userid>&ptid=<pt_id>&sid=ARIARO&inlineprinting=true&d=AssignQuestionnaires
Manage Tx Summary	http://<Equicare web server>/ActivatePatient.ashx?uid=<userid>&ptid=<pt_id>&sid=ARIARO&inlineprinting=true&d=TreatmentSummary
View Education	http://<Equicare web server>/ActivatePatient.ashx?uid=<userid>&ptid=<pt_id>&sid=ARIARO&inlineprinting=true&d=EducationMaterials
Assign Education	http://<Equicare web server>/ActivatePatient.ashx?uid=<userid>&ptid=<pt_id>&sid=ARIARO&inlineprinting=true&d=AssignEducationMaterials
Manage Reminders	http://<Equicare web server>/ActivatePatient.ashx?uid=<userid>&ptid=<pt_id>&sid=ARIARO&inlineprinting=true&d=ManageReminders

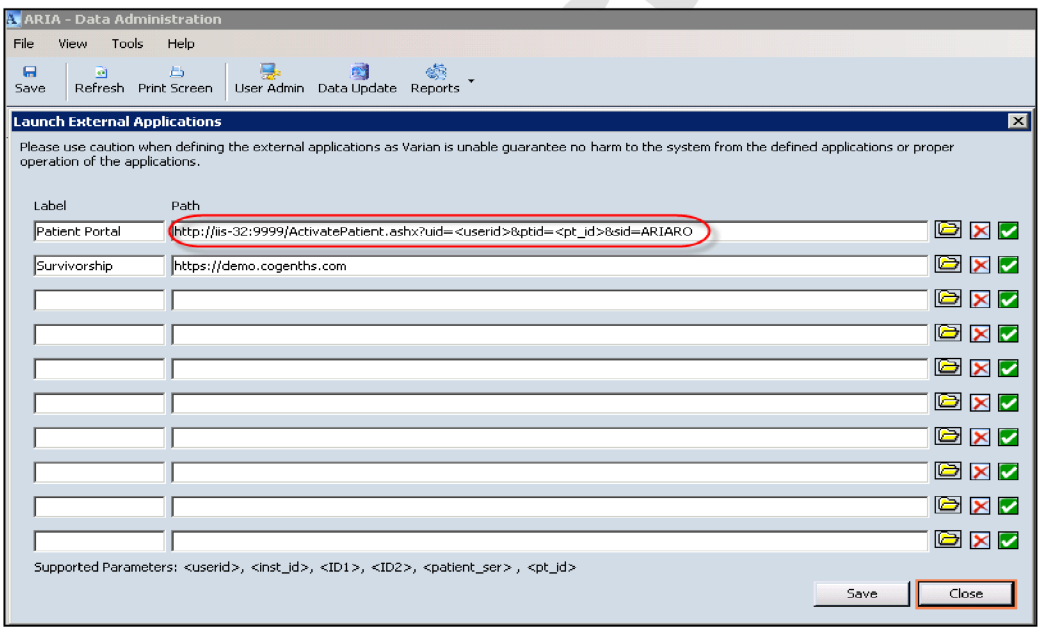
*Note that if a patient is in a pending state, clicking any of the links will initiate the Patient Activation Wizard which allows the user to activate the patient.

For **ARIA RO**, a customer user who has access to ARIA Data Administration can create shortcuts. Once the shortcuts are created in Data Administration, the links will be available to all users.

1) Open the Data Administration application. Navigate to Tools → External Applications → Configure Shortcuts.

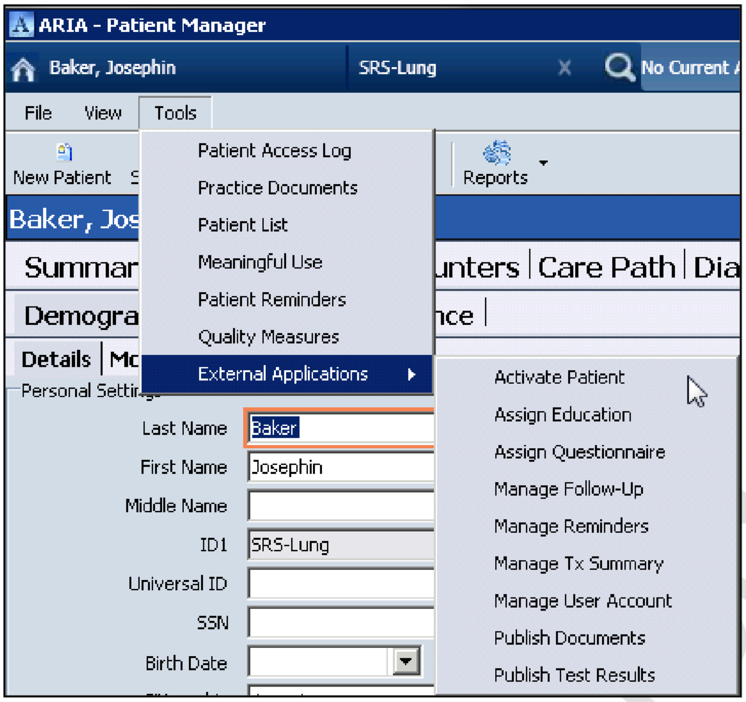


2) The Launch External Applications window will open.



3) Give the link a name in the Label textbox, then enter the path URL into the Path textbox. Click the ‘Save’ button to complete.

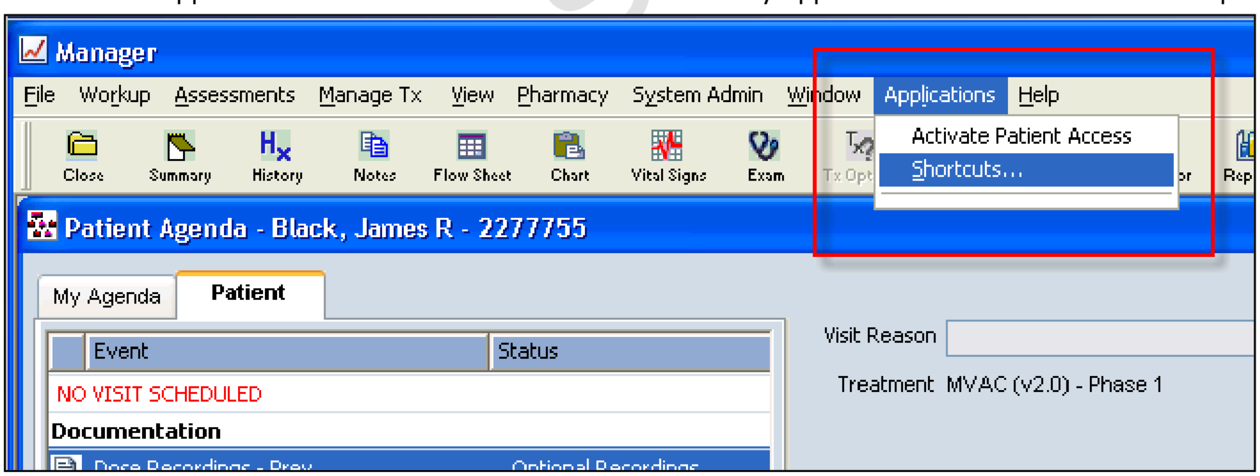
4) Once saved with all the Equicare links, the External Applications menu will look like this:



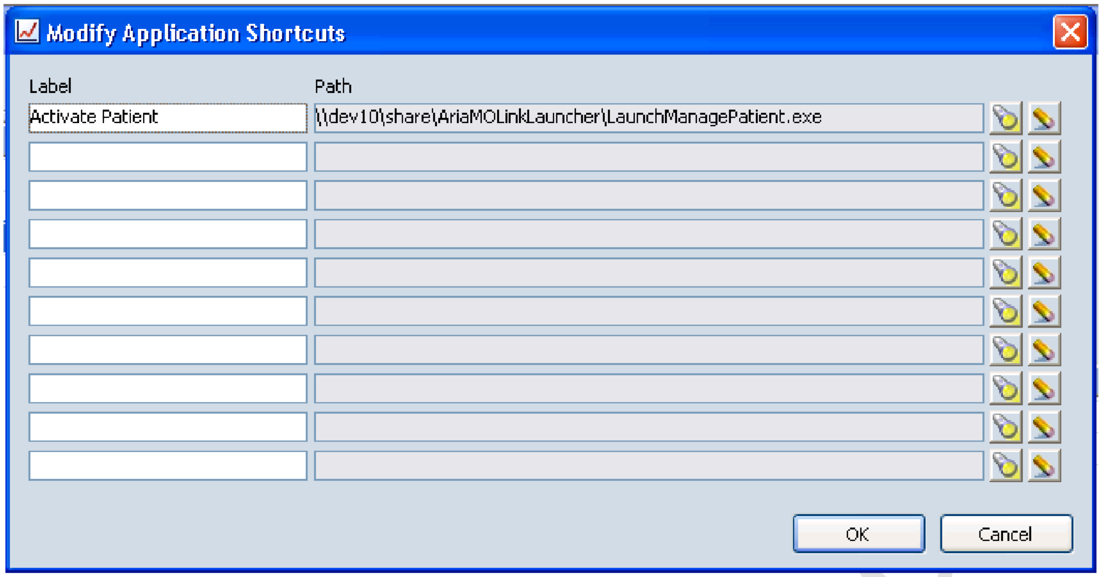
For **ARIA MO**, this process must be done by each clinical user, as the link are specific to the user. All users do not have to have all links. Each user can create only the ones that are useful for them.

To configure the shortcuts, follow these instructions.

1. Log-in to ARIA Manager
2. Click on Applications → Shortcuts in the menu. The “Modify Application Shortcuts” window will open.

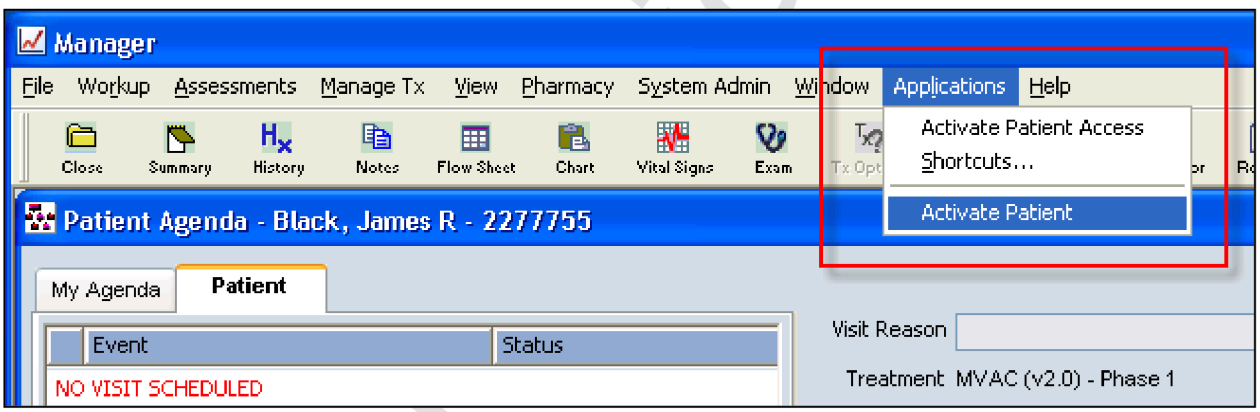


3. In the “Launch External Applications” window, there is a place for a label and a path. The label is the name that will be displayed in the menu in ARIA Manager. The path is the information needed by ARIA to navigate to the correct location in Equicare.
4. Enter the path information.
5. Click the ‘Save’ button.
6. Your screen should look similar to the following image:



7. You can add more shortcuts as desired by following the previous instructions for each shortcut. When you are done, select the “OK” button.

You will now see the link(s) when you click the Applications menu item.

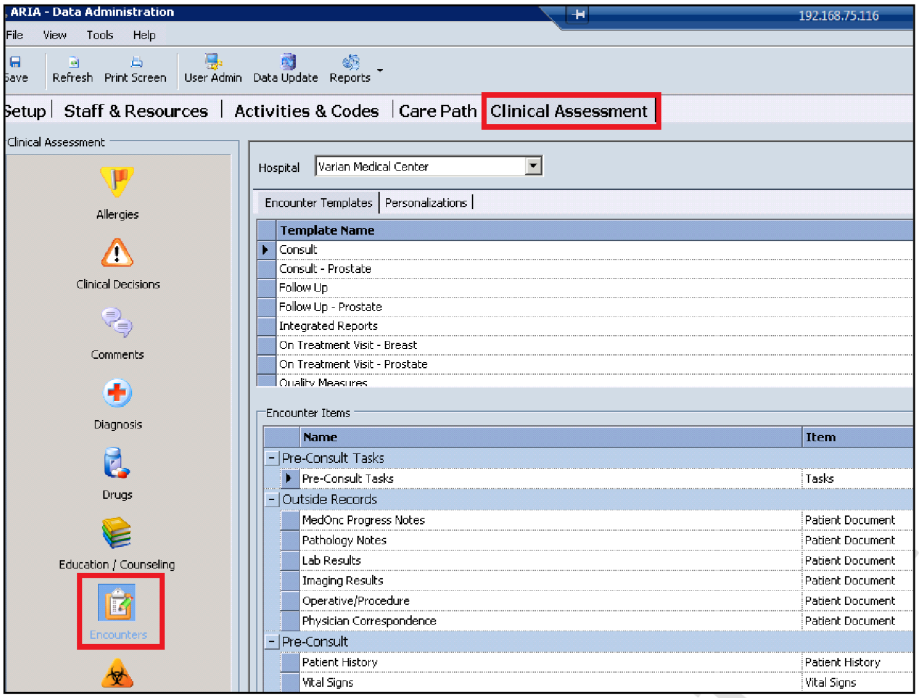


Method 2: Encounters

For **ARIA RO,** a customer user who has access to ARIA Data Administration can create a task within an Encounter which will open EQUICARE.

To add a task to an Encounter, the ARIA administration user should:

1. Log into Data Administration
2. Go to the Clinical Assessment tab
3. Choose Encounters from the Clinical Assessment area



4. Create a new Encounter Template if one doesn't already exist by clicking the 'New' button.
5. If a template already exists, click the 'Edit' button.
6. In the template, add a 'User Defined' item from the Available Items list. Give it an appropriate label and path. Use the blue control arrows to move the item into the template and position it.
7. Click the 'OK' button to save changes.

Appendix H: Equicare Activity shown in ARIA

Activity completed in Equicare can be configured to flow back into ARIA. These actions can be taken by a care provider or, in some cases, by a patient. The list below shows the activity and the corresponding location in ARIA where the activity (and related information) is recorded.

ARIA RO

Activity in Equicare	Location in ARIA RO v11 MR5
Patient Portal enrollment (activation)	Quicklinks>EMR>Communications>upper right corner>Patient Communication Preferences> Preferences tab>'enrolled in Patient Portal' checkbox.
Care Provider completes Questionnaires and Care Plans	Quicklinks: EMR>Documents
Patient completes Questionnaires	Quicklinks: EMR>Documents
Patient views a Health Information Summary	Quicklinks: EMR>Communications> bottom left corner>Patient Communication History> Communication Log tab
Patient views a Clinical Visit Summary	Quicklinks: EMR>Communications> bottom left corner>Patient Communication History> Communication Log tab
Care Provider assigns education resources	Quicklinks: EMR>Communications> bottom left corner>Patient Communication History> Communication Log tab. Event is shown. Note that the title of the articles assigned are also provided.
Patient sends Secure Messages	Quicklinks: EMR>Communications> bottom left corner>Patient Communication History> Messages tab.

ARIA MO

Activity in Equicare	Location in ARIA MO v11 MR5
Patient Portal enrollment (activation)	View>Demographics> Preferences tab. The 'enrolled in Patient Portal' checkbox is shown.
Care Provider completes Questionnaires and Care Plans	Assessments>Notes
Patient completes questionnaire	Assessments>Notes
Patient views a Health Information Summary	N/A

Patient views a Clinical Visit Summary	N/A
Care Provider assigns education resources	View>Patient Communication Log
Patient sends Secure Messages	Workup>Patient Messages

Appendix I: Meaningful Use with ARIA

When used with Varian's ARIA EHR, Equicare can support eligible physicians by allowing them to monitor the following Meaningful Use (MU) and MIPS ACI criteria and objectives.

MU Stage 1 Criteria	Objective
Core 11 – View, Download and Transmit Health Information	Provide patients the ability to view online, download and transmit their health information within four business days of the information being available to the EP.
Core 12 - Provide clinical summaries for patients for each office visit	More than 50 percent of all unique patients seen by the EP during the EHR reporting period are provided timely (available to the patient within 4 business days after the information is available to the EP) online access to their health information, with the ability to view, download, and transmit to a third party.

MU Stage 2 Criteria (2014 Edition)	Objectives
Core 7 - View, Download, Transmit Health Information	*{Measure 1}* More than 50% of patients have been provided online access to their health information within 4 business days
	{Measure 2} More than 5% of patients have Viewed or Downloaded or Transmitted their health information
Core 8 - Provide clinical summaries for patients for each office visit	Clinical summaries provided to patients or patient-authorized representatives within one business day for more than 50 percent of office visits
Core 12 – Reminders for preventive/follow-up care	More than 10 percent of all unique patients who have had 2 or more office visits with the EP within the 24 months before the beginning of the EHR reporting period were sent a reminder, per patient preference when available.

Core 13 – Patient-specific education materials	Patient-specific education resources identified by Certified EHR Technology are provided to patients for more than 10 percent of all unique patients with office visits seen by the EP during the EHR reporting period.
Core 17 – Secure Electronic Messaging	More than 5% of patients have initiated a secure message

MIPS ACI Criteria	Objectives
Objective #3 Measure 1 - Provide Patient Access	Unique patient is provided timely access (within 2 business days) to View, Download, and Transmit their Health Information Summary (CCDA).
Objective #3 Measure 2 Patient-Specific Education	Unique patient is provided with specific education materials.
Objective #4 Measure 1 - View Download and Transmit (VDT)	Unique patient views a CCDA in the Health Information Summary.
Objective #4 Measure 2 - Secure Messaging	Unique patient received a Secure Message from a Care Provider.
Objective #4 Measure 3 - Patient Generated Health Data	Unique patient submits health data or data from a non-clinical setting (i.e. Questionnaire).

Configuration

In order for the ARIA MU Dashboard to be updated, the Equicare system needs to be configured to alert the ARIA system when events take place in Equicare.

Due to the complexity of configuration, representatives from the Equicare Help Desk and Varian Help Desk will be required to assist in set-up.

Meaningful Use Calculations

All Meaningful Use calculations are carried out in by ARIA and displayed in the ARIA Meaningful Use dashboard.

Trigger Events

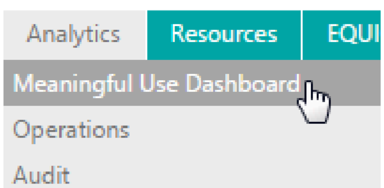
Once configured, the events that trigger the ARIA MU dashboard are as follows:

- Online access to health information is provided by printing an invitation letter in Equicare inviting the patient to the portal. Printing the invitation triggers a notification event to ARIA.
- The action of a patient (or Authorized Representative) viewing a Health Information Summary CCDA triggers a notification event to ARIA. Viewing the CCDA is necessary before downloading or transmitting.
- When an appointment and/or follow-up reminder is sent to a patient from Equicare, ARIA is notified to log the event in the ARIA MU Dashboard.
    - Prerequisites: APP customers must create ARIA appointments of a specific type for preventive/follow-up care for each patient. These appointments must flow into the patient record in Equicare. Equicare must be configured to notify ARIA for notifications sent for only those appointment types. For ECS customers, ARIA appointments can be created as above to satisfy this measure. Additionally, reminders from tasks in an Equicare Follow-up template can be used to trigger a notification.
- When an education article is assigned to a patient in in Equicare, this event is logged in the ARIA MU Dashboard.
- When a patient sends a secure message to a physician from Equicare, this event is logged in the ARIA MU Dashboard

Appendix J: Meaningful Use with Mosaiq

When used with Elekta's Mosaiq EHR, EQUICARE can support eligible physicians by allowing them to monitor criteria for Meaningful Use Stage 1 or Stage 2, and MIPS ACI.

To access the Meaningful Use Dashboard, go to the *Analytics* menu and click **Meaningful Use Dashboard**.



Note: The Meaningful Use Dashboard is only available if the feature is turned on in the system by the EQUICARE Administrator, *and* EQUICARE is connected to at least one Mosaiq system.

Select the desired parameters for the report, then click **Update Dashboard**.

- Reporting period start date
- Reporting period end date
- Physician name
- Meaningful Use Stage 1 or Stage 2, or MIPS ACI

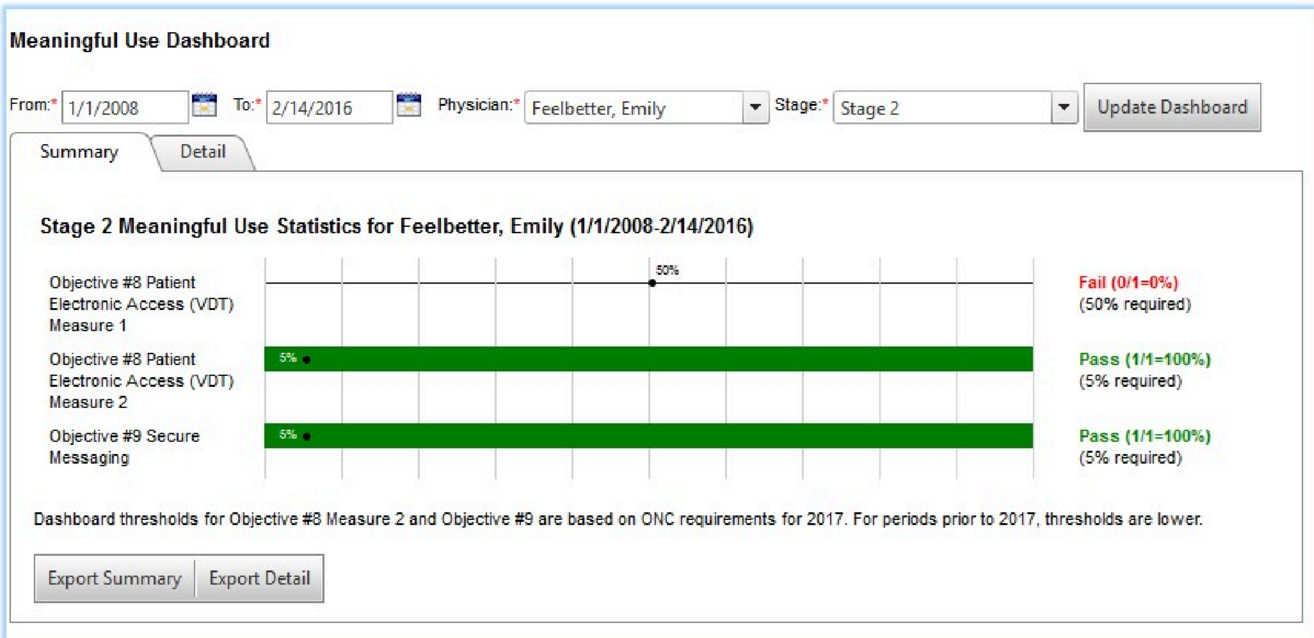
Note that the list of physicians available in the dropdown box is driven by the selected dates and is re-generated every time a new date is picked. This ensures that the user is always presented with a list of eligible physicians to report on, within the specified period.

When **Stage 1** is selected, the dashboard shows the status of the physician regarding:

- **Objective #8:** Patient Electronic Access (VDT) Measure 1

When **Stage 2** is selected, the dashboard shows the status of the physician regarding:

- **Objective #8:** Patient Electronic Access (VDT) Measure 1
- **Objective #8:** Patient Electronic Access (VDT) Measure 2
- **Objective #9:** Secure Messaging



For each monitored criteria of Stage 1 and Stage 2, the following information is displayed:

- The objective (in %)
- The progress of the physician toward this objective:
  - A green bar if the objective is met or exceeded
  - A red bar if the objective is not met
- A Pass/Fail indicator with the calculation figures

When **MIPS ACI** is selected, the dashboard shows the status of the physician regarding:

- **Objective #3 Provide Patient Access:** Unique patient is provided timely access (within 2 business days) to View, Download, and Transmit their Health Information Summary (CCDA).
- **Objective #4 View, Download and Transmit (VDT):** Unique patient views a CCDA in the Health Information Summary.
- **Objective #4 Secure Messaging:** Unique patient received a Secure Message from a Care Provider.

Exporting the MU Dashboard Information

The *Export Summary* button allows the user to export the summary calculation data in the form of a CSV file readable with an application such as Microsoft Excel.

The *Export Details* button allows the user to export all the underlying data which were used for the dashboard calculation, in the form of a CSV file readable with an application such as Microsoft Excel. This file can be used to identify which patients require attention in order to help physicians meet their objectives, since the detailed data includes:

- The list of all patients which were identified by the system as a unique patient who had at least one encounter with this physician during the specified reporting period
- For each patient:
    - a qualifying encounter justifying why this patient is included in the denominator calculation for this physician
    - for each criteria, the actions justifying why this patient is or is not included in the three numerator calculations
- A summary row showing:
    - the total number of patients counted in the denominator
    - for each criteria, the total number of patients included in the three numerators

Meaningful Use Calculations

Equicare is sent CCDA's by Mosaiq systems which are configured to communicate with it. Equicare stores the CCDA's and collects all needed information regarding encounter(s) found in each CCDA, in order to allow the calculation of the common denominator and the three numerators.

For each eligible physician, the MIPS and Meaningful Use Stage 2 (2015 Edition) calculations are as follow :

- Meaningful Use Objective #8-Measure 1 / MIPS Objective #3 Provide Patient Access:

$$\frac{\text{\# of patients } \textbf{invited to the Patient Portal}}{\text{Total \# of unique patients seen by the physician during the reporting period}}$$

- Meaningful Use Objective #8-Measure 2 / MIPS Objective #4 View, Download and Transmit (VDT):

$$\frac{\text{\# of patients } \textbf{who viewed their CCDA}}{\text{Total \# of unique patients seen by the physician during the reporting period}}$$

- Meaningful Use Objective #9 / MIPS Objective #4 Secure Messaging:

$$\frac{\text{\# of patients who } \textbf{received a Secure Message}}{\text{Total \# of unique patients seen by the physician during the reporting period}}$$

When any given physician wants to monitor their progress toward their objectives, the following calculation principles are applied on the recorded data:

1. Find **how many unique patients** saw this physician between Date1 - Date2 *(Common denominator)*

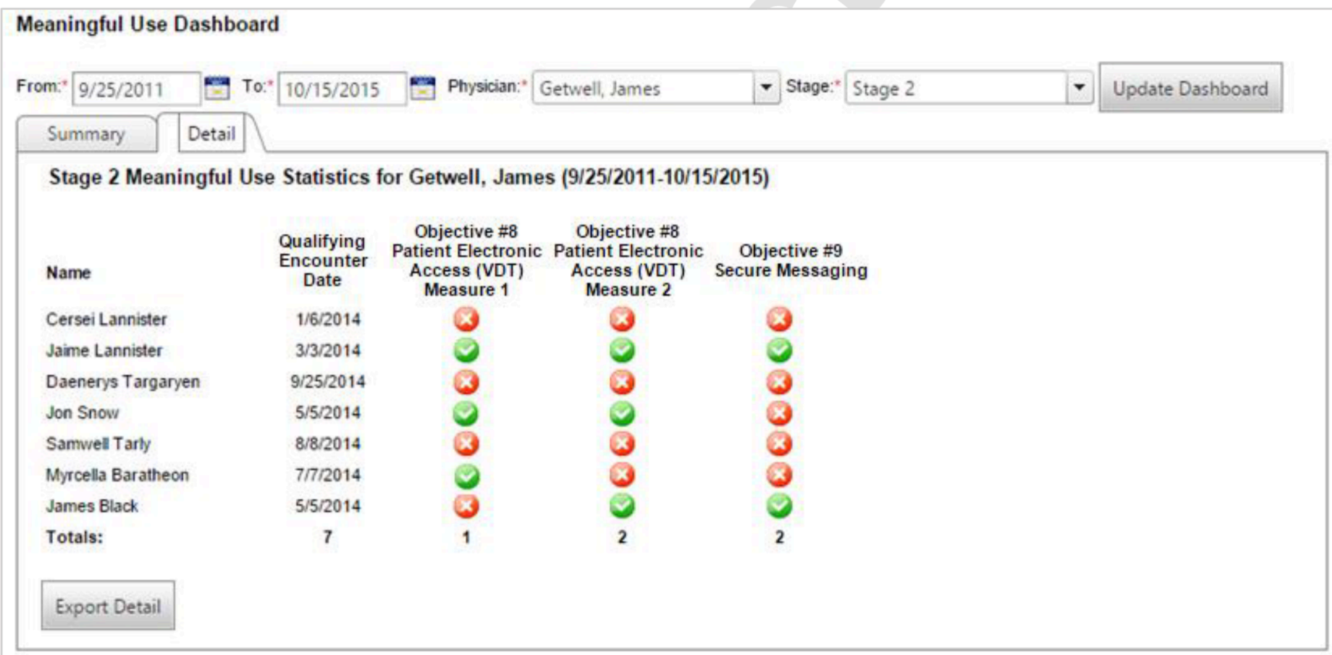
2. **Among these identified patients**, and between Date1 - Date2, find **how many**:
   - **were invited to the portal** *(Numerator)*
   - **viewed a CCDA** *(Numerator)*
   - **received a secure message** *(Numerator)*

Notes:

- *When collecting data out of each received CCDA, the physician's NPI is required and used as unique identifier of the Care Provider(s) involved in the encounter(s) (as opposed to the First and Last Name).*
- *In order to be eligible for Meaningful Use, physicians must have had at least one encounter with a patient during the reporting period.*

Detail Tab

The Detail tab can be used to identify which patients require attention in order to help physicians meet their objectives.



Name	Qualifying Encounter Date	Objective #8 Patient Electronic Access (VDT) Measure 1	Objective #8 Patient Electronic Access (VDT) Measure 2	Objective #9 Secure Messaging
Cersei Lannister	1/6/2014	✗	✗	✗
Jaime Lannister	3/3/2014	✓	✓	✓
Daenerys Targaryen	9/25/2014	✗	✗	✗
Jon Snow	5/5/2014	✓	✓	✗
Samwell Tarly	8/8/2014	✗	✗	✗
Myrcella Baratheon	7/7/2014	✓	✗	✗
James Black	5/5/2014	✗	✓	✓
Totals:	7	1	2	2

The detailed data includes:

- The list of all patients which were identified by the system as "*a unique patient who had at least one encounter with this physician during the specified reporting period*"

- For each patient:
  - a qualifying encounter, justifying why this patient is included in the denominator calculation for this physician
  - for each criteria : the actions justifying why this patient is or is not included in the three numerator calculations

- for each completed measure (green checkmark), hovering with the mouse on the checkmark will display what the action was, and when it occurred

- A summary row showing:
  - the total number of patients counted in the denominator

For each criteria, the total number of patients included in the three numerators. The **Export Detail** button allows the user to export all the displayed data (which were used for the Dashboard Summary calculation), in the form of a CSV file readable with an application such as Microsoft Excel.

Appendix K: Mosaiq Integration with Secure Messages

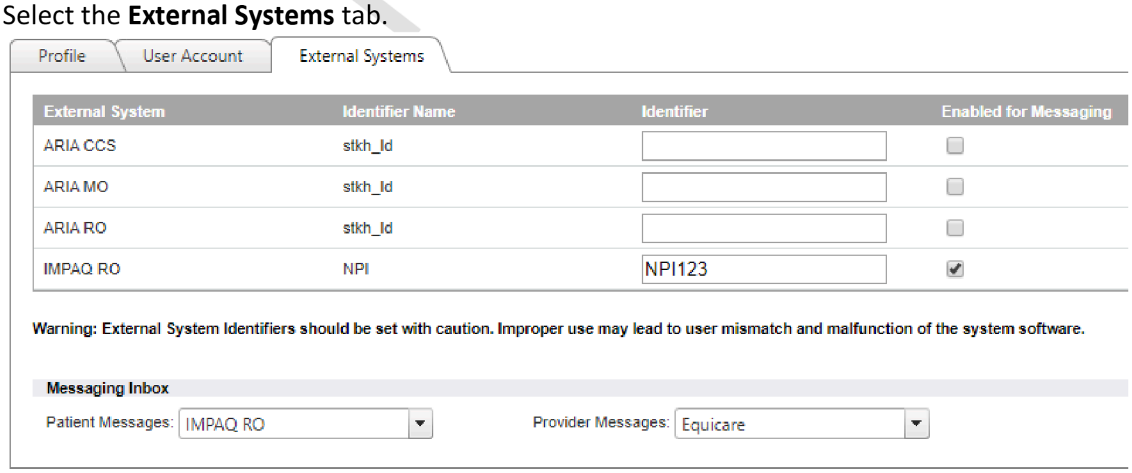
For customers with Mosaiq 2.8.2 or greater, secure messages sent from the patient portal can be received in the inbox in Mosaiq, and messages sent from within Mosaiq can be received in the patient portal. This feature must be configured in the system.

To configure message integration with Mosaiq:

1. Go to **EQUICARE Admin > Configure Secure Messaging**.
2. When adding or editing a *Secure Message Destination*, select the *Method* of **Mosaiq Secure Message Service**
3. Ensure the rest of the external system information is correct. IT Administrators for the external system typically have the required information. Otherwise, please contact the Equicare Services team for assistance.
4. Click **Save**.

To configure a user to use the Mosaiq Inbox:

1. Go to **EQUICARE Admin > Manage users**.
2. Locate the desired user and click **Edit**.
3. Select the **External Systems** tab.



4. Enter an Identifier for the Mosaiq system being used for messaging, then place a check in the box labelled *Enabled for Messaging*.
5. In the *Provider Messages* list, select the Mosaiq system being used for messaging (note that it must already have an identifier and be enabled for messaging).

6. Click **Save**.

Signature Manifest

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APP Training Workbook

Change Request

Name/Signature	Title	Date	Meaning/Reason
Warren Pon (WARREN.PON)	Director of Operations	09 Jun 2025, 10:44:52 AM	Approved

Departmental Approval

Name/Signature	Title	Date	Meaning/Reason
Gary Poon (GARY.POON)	Director of Product Manager	09 Jun 2025, 11:43:10 AM	Approved

Author Approval

Name/Signature	Title	Date	Meaning/Reason
Blake Lachance (BLAKE.LACHANCE)	Technical Writer	09 Jun 2025, 11:42:04 AM	Approved

Quality Approval

Name/Signature	Title	Date	Meaning/Reason
Warren Pon (WARREN.PON)	Director of Operations	09 Jun 2025, 12:03:51 PM	Approved

Set Date

Name/Signature	Title	Date	Meaning/Reason
Warren Pon (WARREN.PON)	Director of Operations	09 Jun 2025, 12:12:02 PM	Approved