SigMail

Secure Messaging and Video Virtual Care Platform
for HealthCare Professionals and Patients

Physician User Guide

August 2022

SIGMA HEALTHTECH

For information or support, contact:

Sigma HealthTech Inc.
2910 S Sheridan Way,
Oakville, ON L6J 7L9
(416) 368-2000
support@SIGMAHEALTHTECH.COM

Web Site: www.sigmahealthtech.com
Video Tutorials and guides: www.sigmahealth.tech

TABLE OF CONTENTS

1 Introduction to SigMail

Welcome to SigMail, a HIPAA / PHIPA compliant, team based, end to-end encrypted web-based messaging and video system to allow care providers to communicate with each other and their patients.

Traditionally, the sharing of health information between institutions, medical offices, physicians and patients has largely been performed either by *fax machine* or by use of *regular email*. These traditional communication methods are not secure and can expose healthcare providers to significant risk.

- Fax transmittals can be inefficient and unreliable and can potentially expose this information to anyone within the office that is receiving the fax.
- Similarly, regular email can put the patient's privacy at risk since this communication does not simply pass directly from computer to computer. Instead, it can pass through multiple mail servers and different proxy servers before it reaches the receiver's mail server. The receiver then reads the message from the server with the client program in use (such as Gmail, Outlook and Yahoo). When such emails travel unprotected, they are readable as they are transferred, stored and resent between each step of these transmissions.

This prompted the Information and Privacy Commissioner (IPC) of Ontario to state in 2016 that the PHIPA requires the use of encryption and "*expects that email communication of personal health information among custodians will be secured from unauthorized access by use of encryption*" and "*custodians should use encryption for email communication with patients.*"

SigMail is a next-generation messaging system allowing physicians, healthcare institutions, pharmacies, patients and other healthcare service providers to communicate in a *secure and encrypted* manner, while protecting confidential records and patient information. It is team based and allows the entire healthcare team to share in patient care

- SigMail can be used to communicate and send all types of Personal Health Information (PHI) between healthcare offices, service providers and patients in a safe and secure fashion.
- Healthcare providers can setup a SigMail account via their clinics / institutions and may create accounts for each one of their patients.
- Patients can utilize the SigMail secure messaging platform to message their doctor or those defined within their Circle of Care.
- SigMail allows physicians to exchange home monitoring results (blood pressure, EKG strips, heart rates, oxygen levels, etc.), lab requisitions/ testing requisitions securely protecting patient health information as attachments to these messages. Photographs of incisions, or other images can be sent. Attachments are encrypted in the same manner.

- SigMail has been designed to improve the overall patient experience and healthcare office efficiencies using asynchronous communication, rather than depending on traditional (and non-secure) communication methods like telephone calls, fax machines, or regular email.
- SigMail is a web based application so no app needs to be downloaded. It runs on any modern web-browser on desktop computers, tablets or mobile phones.

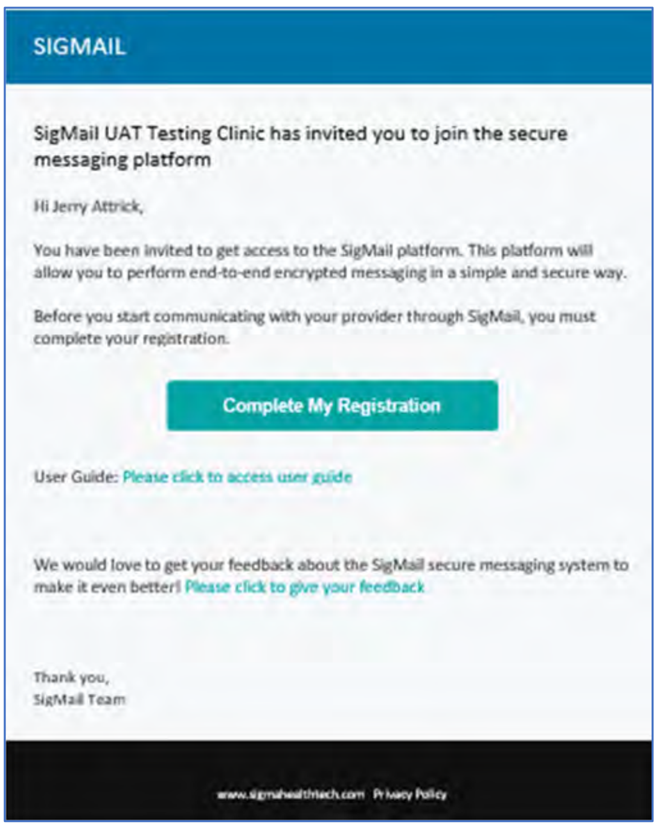
2 Activating your SigMail Account (Registration)

SigMail accounts can be added to the system either by request to a back-office SigMail Administrator, or by an invitation initiated from an existing SigMail account holder (using the 'Manage Members' capabilities available under their account).

This process is generally referred to as 'onboarding' new SigMail members.

When your SigMail account is initially created, it will be in a Pending status. Before you can start using your SigMail account, you will need to activate your account by completing an *Account Registration* step.

Once you have been 'onboarded' as a new member, the system will send an automated email to you requesting you to complete this Registration process.

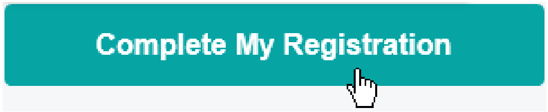


This email with be sent from noreply@sigmail.ca with the subject line description of "SigMail <clinic name> Clinic has invited you to join the secure messaging platform".

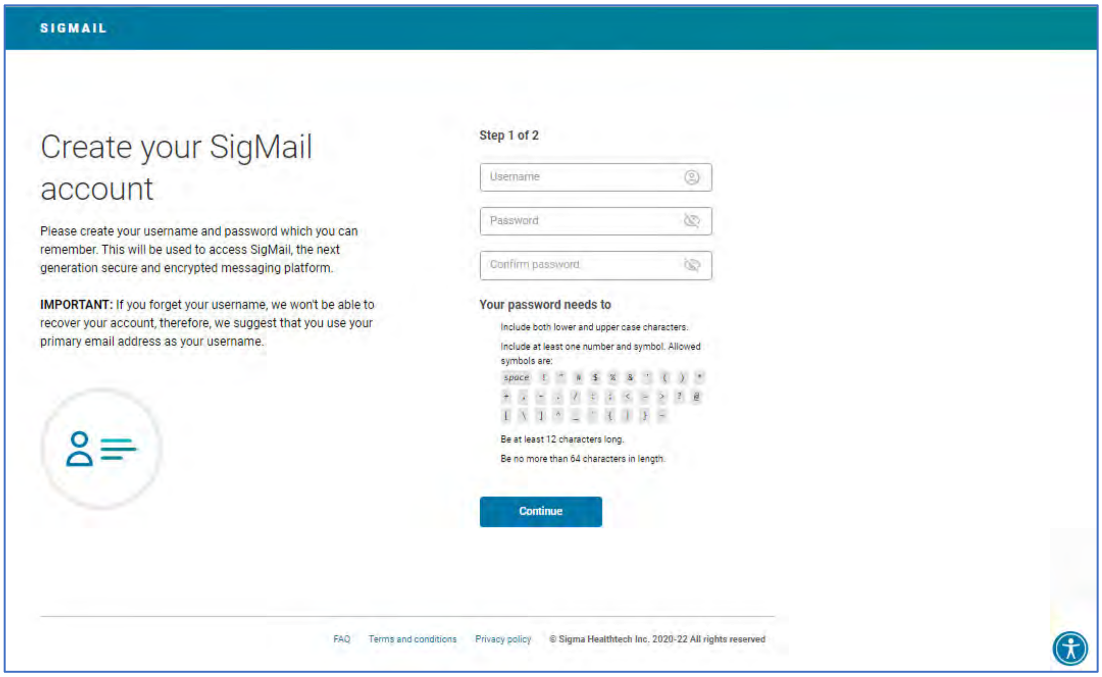
- In the above example, the invite was initiated by an existing member belonging to the 'UAT Testing' clinic. As such, the email subject shows "Sigmail *UAT Testing* Clinic has invited you …").

To complete the Registration of your SigMail Account:

- Click the ‘Complete My Registration’ button within the invitation email.



- A SigMail window will then be opened in your browser; you will be presented with the ‘**Create your SigMail account**’ screen.

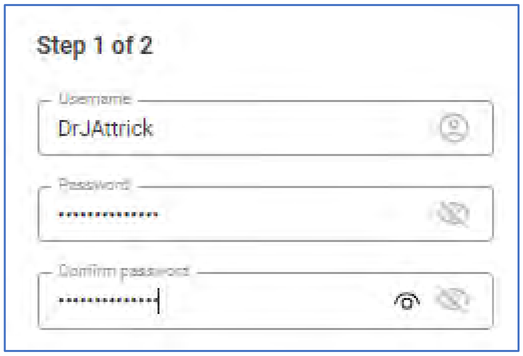


- Complete Step 1 of the registration process using the fields on this screen:

  - **Username**: Enter a Username for login purposes to your account.
    - *For ease, you may choose to simply use your email address as your Username.*
    - *Alternatively, enter any unique value that will help safeguard your account.*

  - **Password:** Enter a password for login purposes to your account. As indicated, your password must:
    - *include both lower-case and upper-case characters*
    - *include at least one number and at least one symbol.*
    - *be at least 12 characters in length (but not more than 64 characters)*

  - **Confirm password**: Re-enter the same password value in this field for confirmation



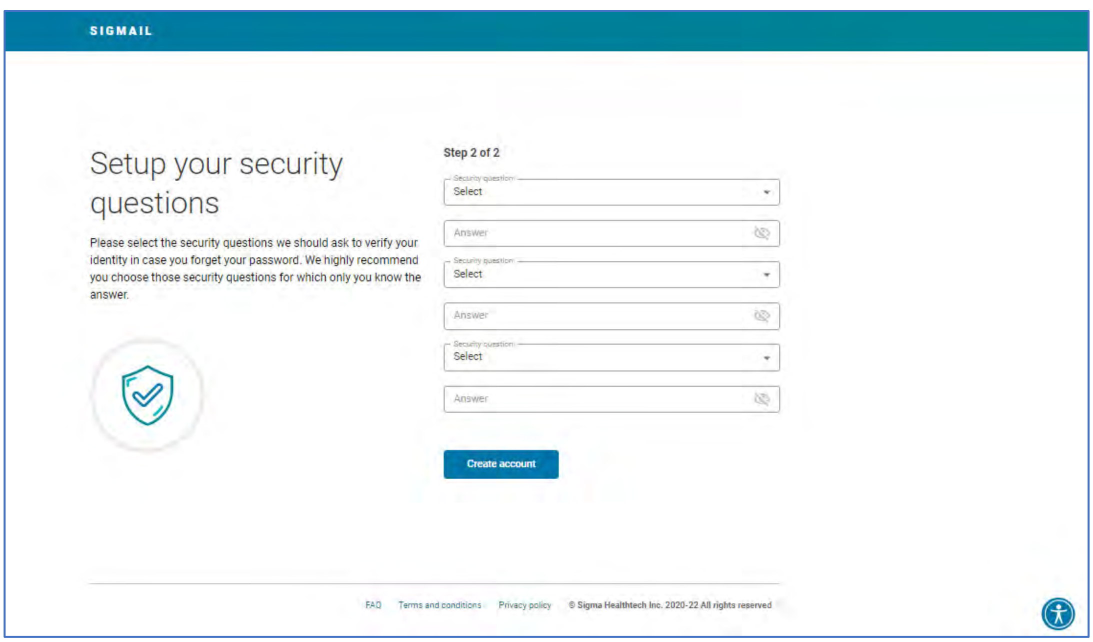
TIP:

By default, the *Password* and *Confirm password* field values that you enter will be hidden and only appear as asterisks.

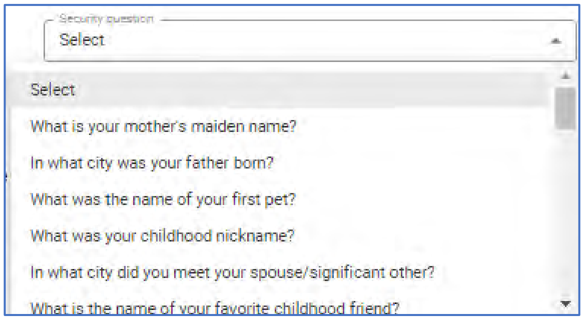
- To view the values that you are entering in these fields, click on the icon.
- The icon will change to and the characters entered will then be unmasked.

- To proceed, click the 'Continue' button at the bottom of the window.

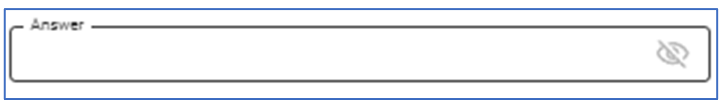
- You will next be presented with the '**Setup your security questions**' screen.



- On this screen, **you are required to select *three* Security Questions and enter the associated answers to each question**. Three sets of fields (‘Security question’ and ‘Answer’) are provided.
- For each set of fields:
  - Click on the ‘Security question’ field to open the drop-down of available Security questions. Click a question on the drop-down to select it.



  - Click on the ‘Answer’ field (immediately below your selected Security question). The field will be enabled for entry. Enter the answer to your Security question.



  - Repeat until you have selected and answers all three Security questions.

TIP:

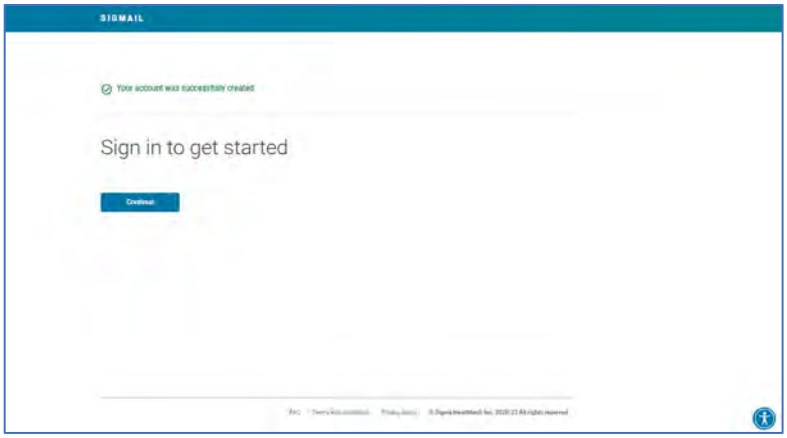
Similarly, the security question field values that you enter here will be hidden by default and only appear as astericks.

- To view the values that you are entering in these fields, click on the icon.
- The icon will change to and the characters entered will then be unmasked.

These security questions are a secondary safeguard for protecting your SigMail account. If you attempt to login to your account and forget your account Password, you will need to provide answers to these security questions as way of confirming your identity. Answering these security questions will be required to Reset your Password and regain access your SigMail account.

- To complete the account registration, click the ‘Create account’ button at the bottom of the window.

- You will next be presented with the ‘**Sign in to get started’** screen. A confirmation message (‘Your account was successfully created’) will appear at the top of this screen.

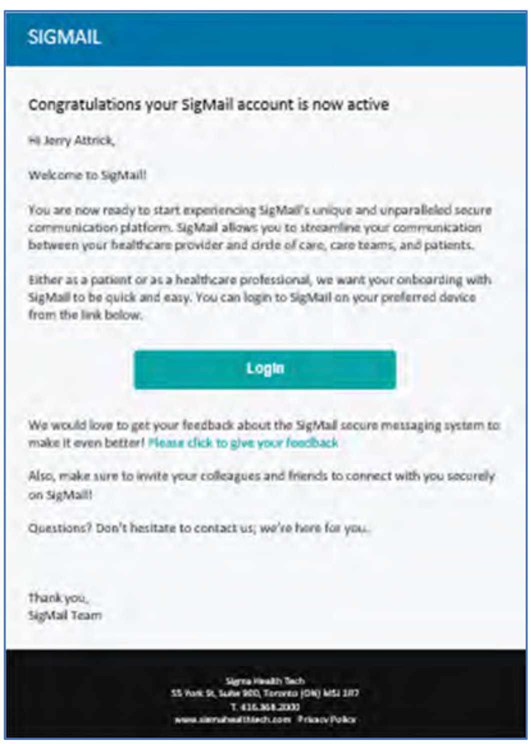


The status of your SigMail account will now be 'Active' (rather than 'Pending') and ready for you to access.

- If you wish to immediately login to your SigMail account, click the 'Continue' button on this screen.

- You will then be presented with the 'Sign in' screen of the SigMail system.

The system will also send an automated email to your mailbox once you have completed the Account Registration. This email with be sent from noreply@sigmail.ca with the subject line description of "Congratulations your SigMail account is now active".



This email can also be used to access your SigMail account:

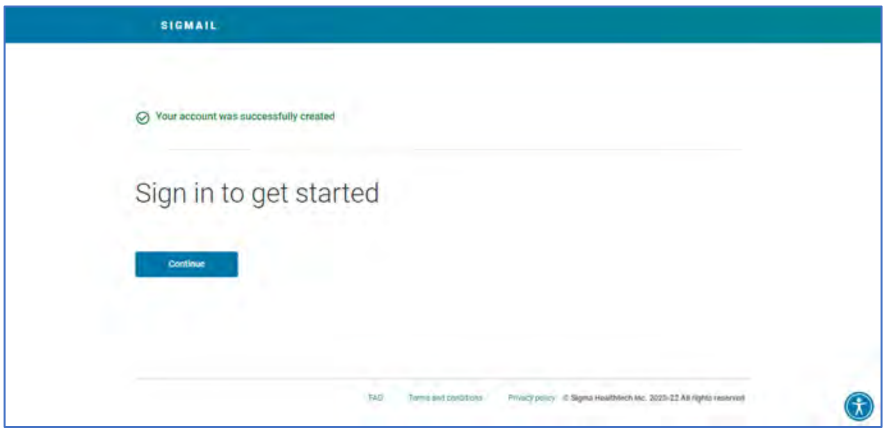
- Clicking on the ‘Login’ button within this email.

- This will trigger the opening of a browser window and the same ‘Sign in’ screen will be presented.

3 Signing In

Once your SigMail account is Active, you can login to your account by any of the following methods:

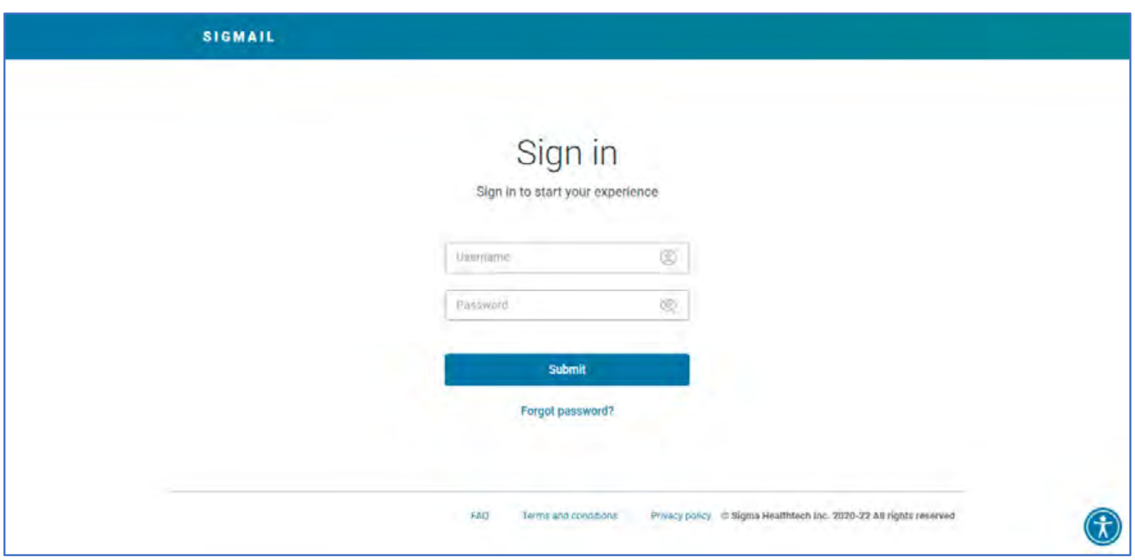
- If you have just completed the Account Registration and immediately wish to login from the '**Sign in to get started'** screen, click the 'Continue' button located at the bottom of that screen.



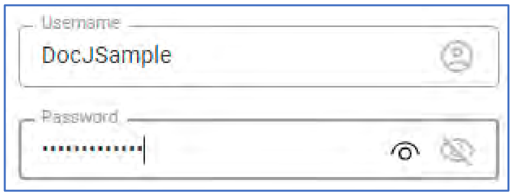
- Alternatively, you can use the email you received after completing the Account Registration process (with the subject line "**Congratulations your SigMail account is now active"**). Click the 'Login' button within this email.

- Login directly by accessing the SigMail website by entering '**www.sigmail.ca'** in your web browser. You can use a desktop computer, tablet or mobile phone.

Regardless of which method you use, you will be presented with SigMail '**Sign In**' window.

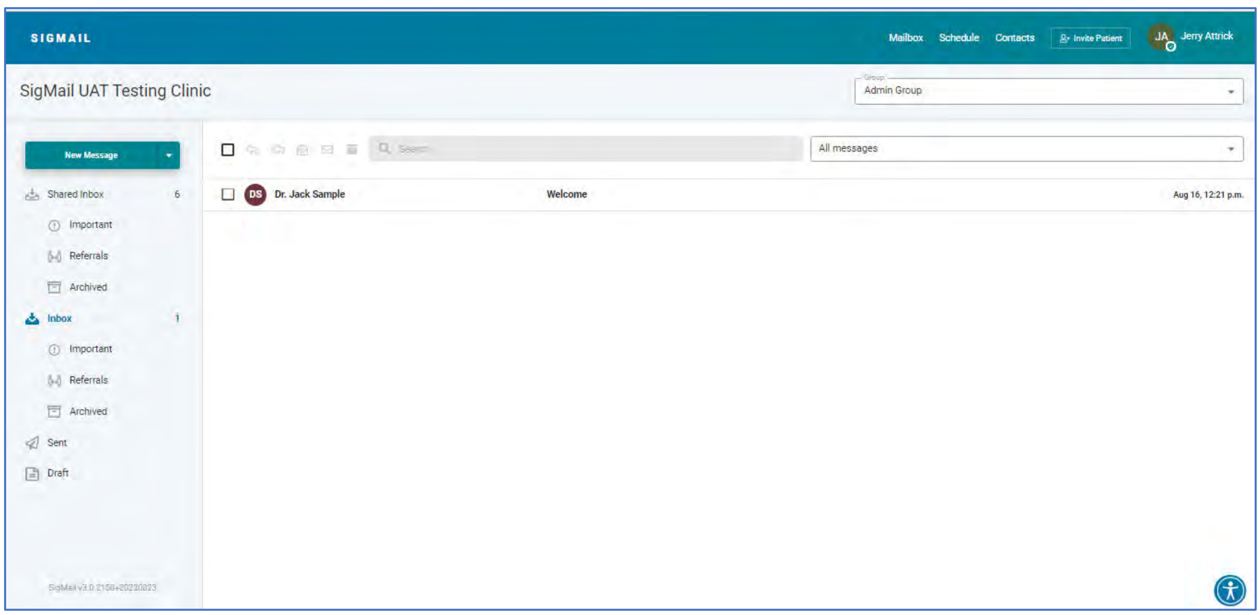


- On the '**Sign In'** window:
  - Enter the ***Username*** that you defined when you registered your account
  - Enter the ***Password*** that you set when you registered the account



  - Click the '***Submit***' button at the bottom of the '**Sign In**' screen.

- You will then be logged into your SigMail account. You will be initially presented with the '**Mailbox' page** of your account.



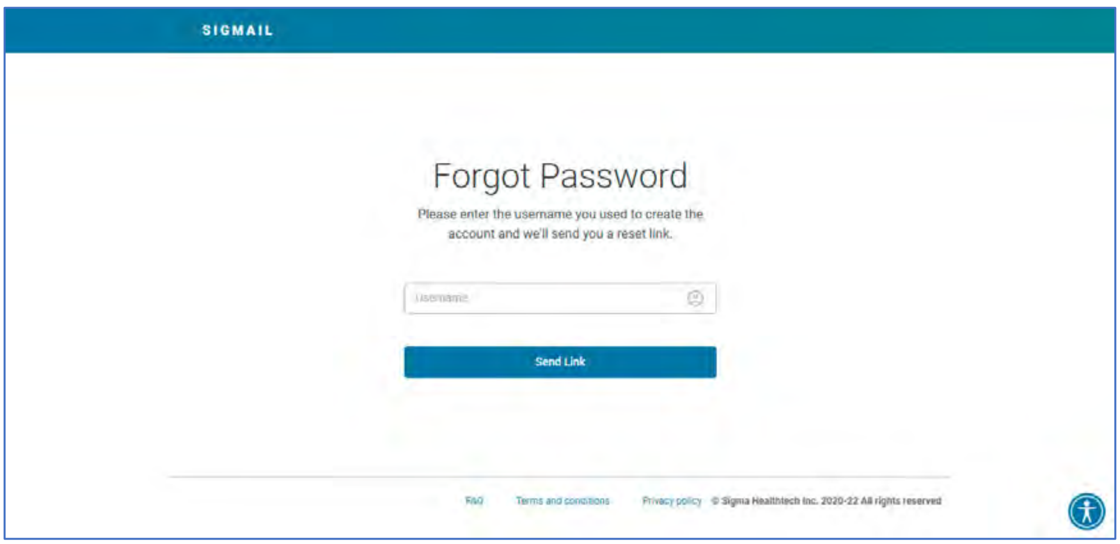
4 Resetting a Forgotten Password

When logging into your SigMail account, you may have forgotten your Password. You will need to reset your password to regain access to your account.

To perform a Password Reset:

- On the SigMail 'Sign in' page, click the **'Forgot password?**' link at the bottom of the screen (available directly below the 'Submit' button.).

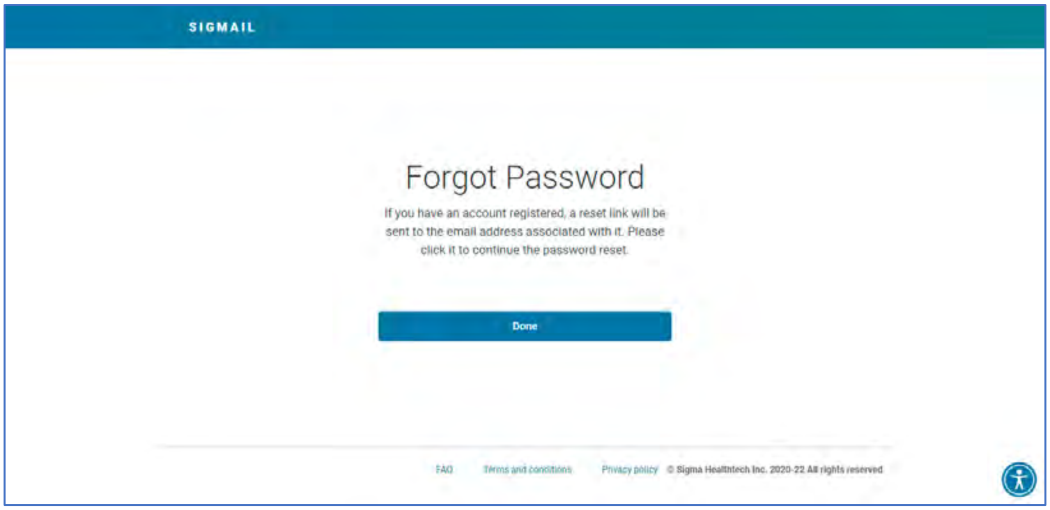
- The **'Forgot Password**' screen will then be displayed.



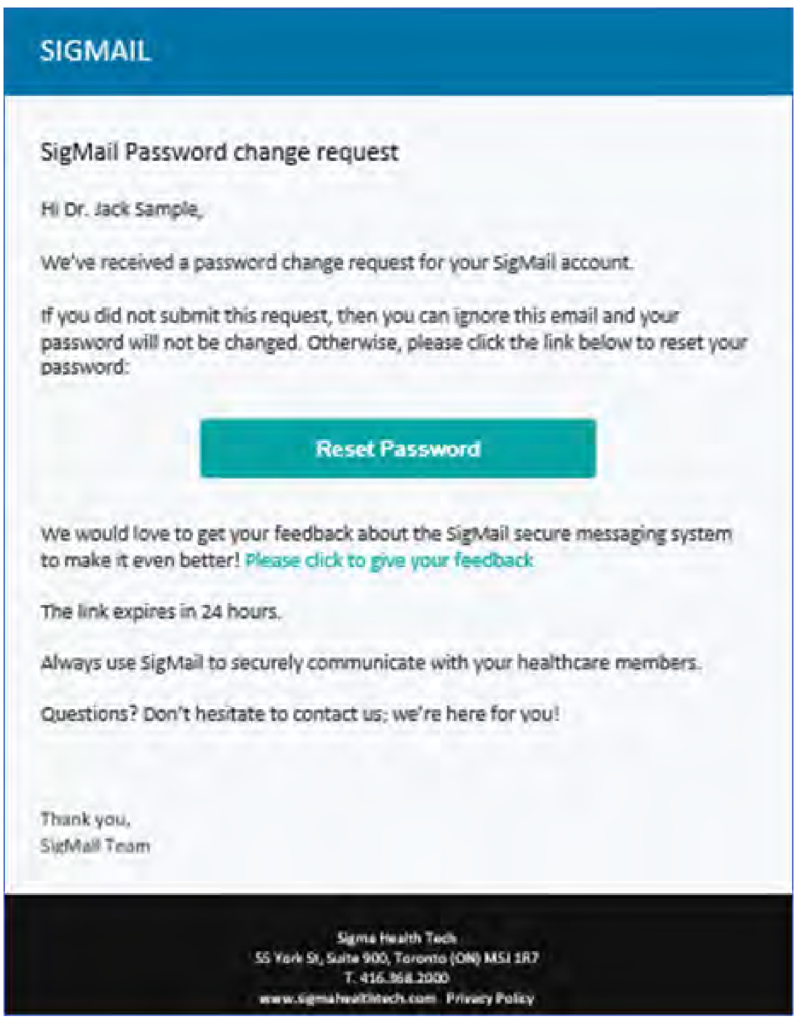
- Enter the '**Username'** for your SigMail account in the provided field.

- Click the '**Send Link**' button.

- The system will then display an updated 'Forgot Password' screen indicating that a link to reset your password has been sent to the email address associated with your account.

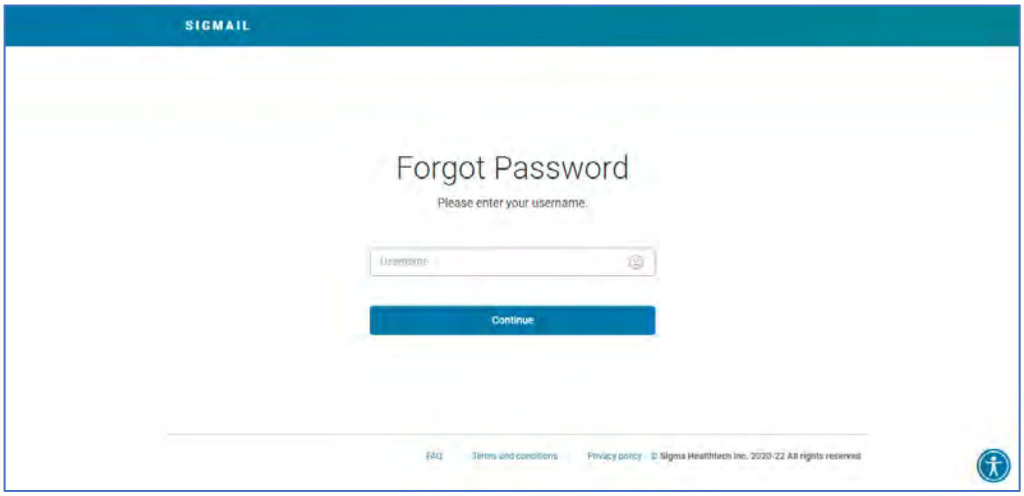


- Access the email mailbox associated with your SigMail account. You should find an email sent from **noreply@sigmail.ca** with the subject line description of "**SigMail Password change request".**



- Click the ‘Reset Password’ button within this email.

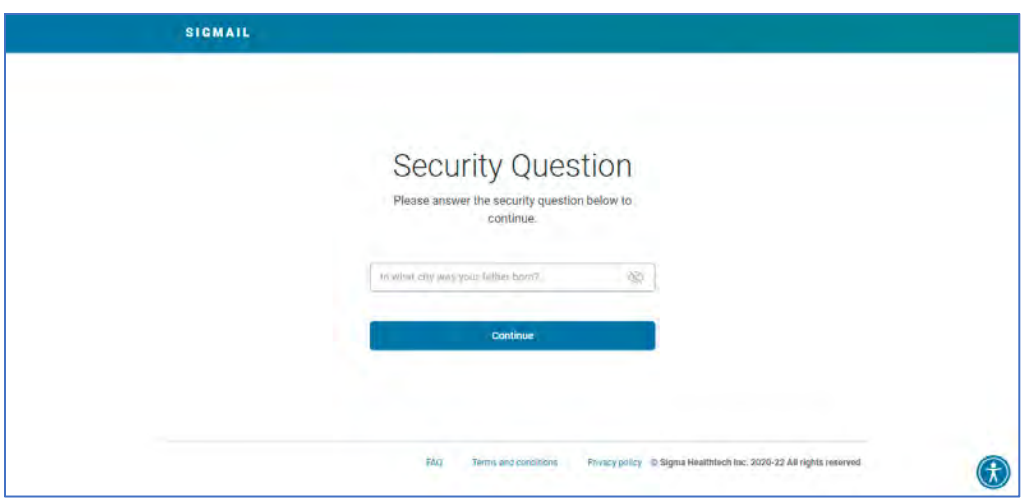
- This link will open a new ‘Forgot Password’ SigMail window.



- Enter the ‘**Username’** for your SigMail account in the provided field.

- Click the ‘**Continue**’ button within this email.

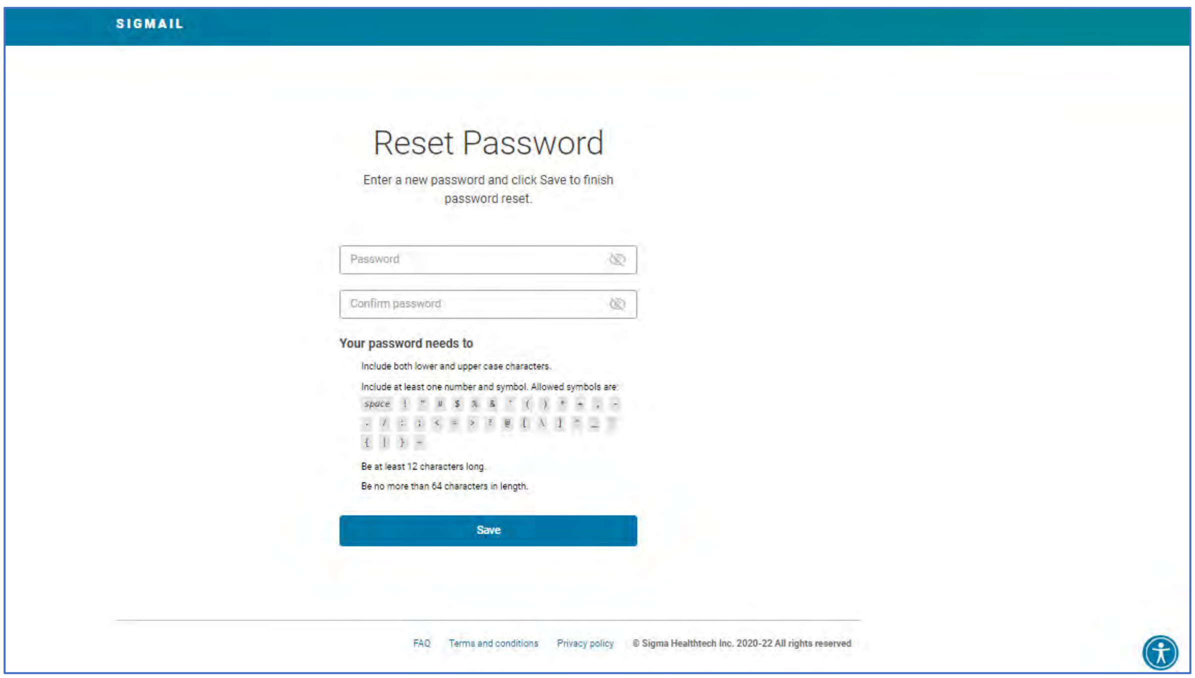
- A SigMail ‘Security Question’ screen will next be presented.



- The screen will include one of the security questions you answered at registration. Enter the answer to the Security Question in the provided field to confirm your identity.

- Click the '**Continue**' button.

- After correctly answering the Security Question, the system will next provide a **'Reset Password'** window.



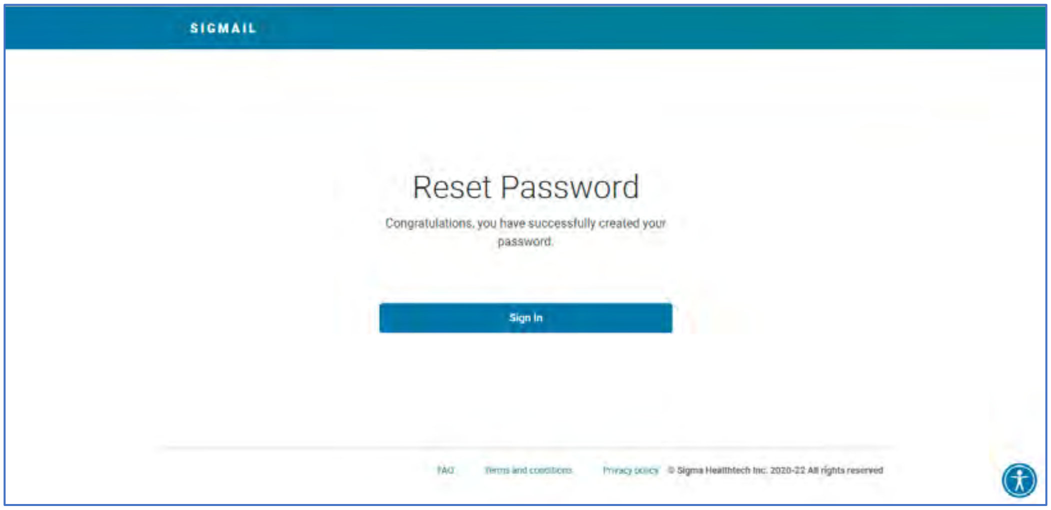
- On the Reset Password window:

  - **Password:** Enter a new/replacement password for your SigMail account
    - *include both lower-case and upper-case characters*
    - *include at least one number and at least one symbol.*
    - *be at least 12 characters in length (but not more than 64 characters)*

  - **Confirm password**: Re-enter the new password value in this field to confirm the value

  - Click the **'Save'** button.

- A '**Reset Password' Confirmation window** will then be displayed indicating you have successfully reset your password.

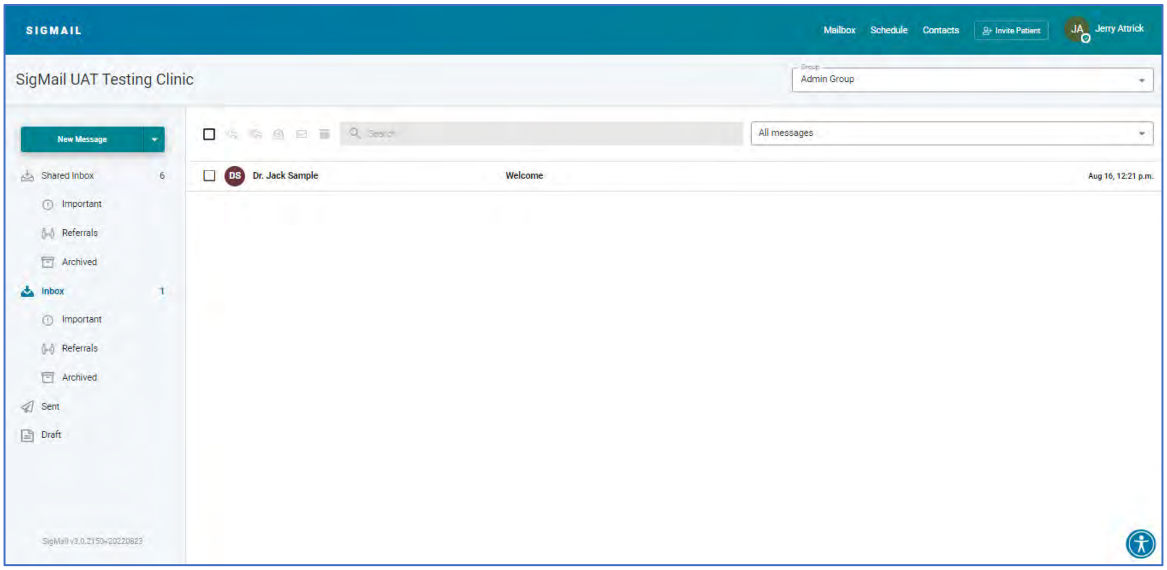


  - Click the **'Sign In'** button on this screen.

- You will then be returned to the SigMail '**Log in**' screen, where you will be able to login to your SigMail account using your new Password.

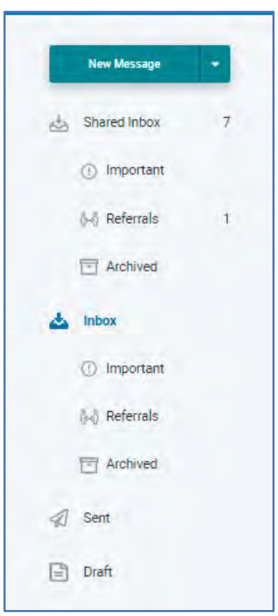
5 Navigating your 'Mailbox' folders

As mentioned, when you log into your SigMail account, you will initially land on the '**Mailbox' tab page** of your account.



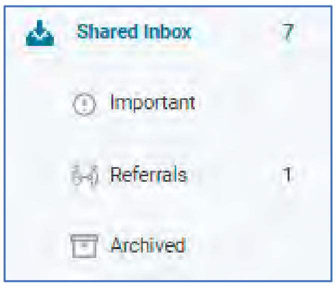
If you are positioned on a different tab page of your account, you can access this **'Mailbox' tab page** using the toolbar at the top of the SigMail Account window.

The '**Mailbox' tab page** has a **Menu List** on the left-hand side of the page.



- This Menu List allows you to switch between:
  - a Personal '***Inbox***' folder
  - a '***Shared Inbox'*** folder
  - a '***Sent***' folder
  - a '***Draft***' folder

- When you initially land on this page, your personal 'Inbox' will be pre-selected and open for view.
- There may be numbers displayed beside some of the Mailbox labels on this left-hand side Menu List. These **numbers indicate the count of new (Unread) messages** within that specific Mailbox (or mailbox subfolder view).

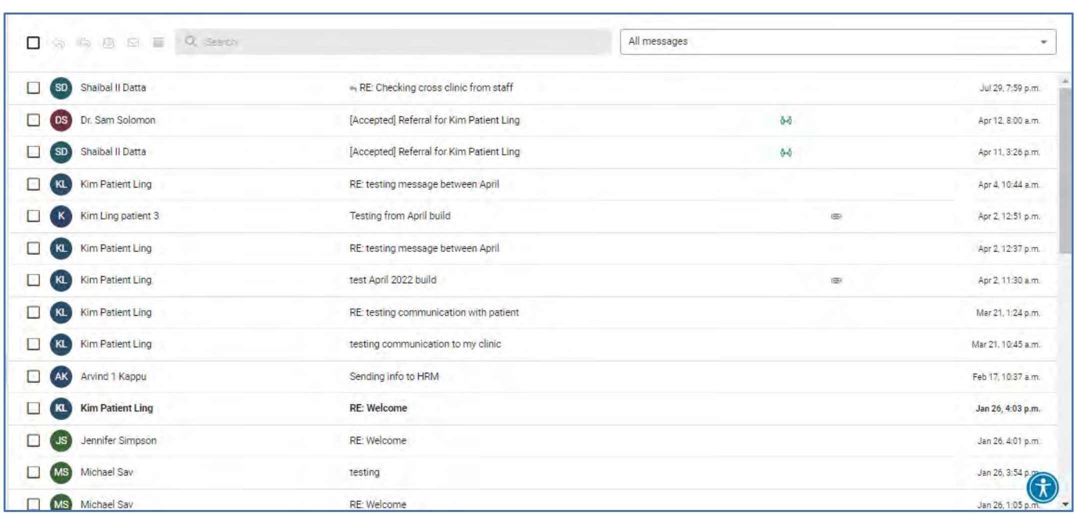


- **To switch the view, click on the desired Mailbox folder (or subfolder view) label within the left-hand Menu List.** The Mailbox tab window will then retrieve and display only the messages associated with that selected Mailbox (or Mailbox folder).

<u>**List View:**</u>

Messages for the selected Mailbox folder (or subfolder view) are listed on the right-hand side window of the page.

- This right-hand side **List View** *will only display message rows for that specific Mailbox (or subfolder view) that is selected.*



- The **List View** of messages includes the following column information for each message row:
  - *Sender Name (From)*
  - *Subject*
  - *Date and Time*
  - *indicator* (if the message is a Referral)
  - *indicator* (if the message was flagged as Important)
  - *indicator* (if the message has an Attachment)

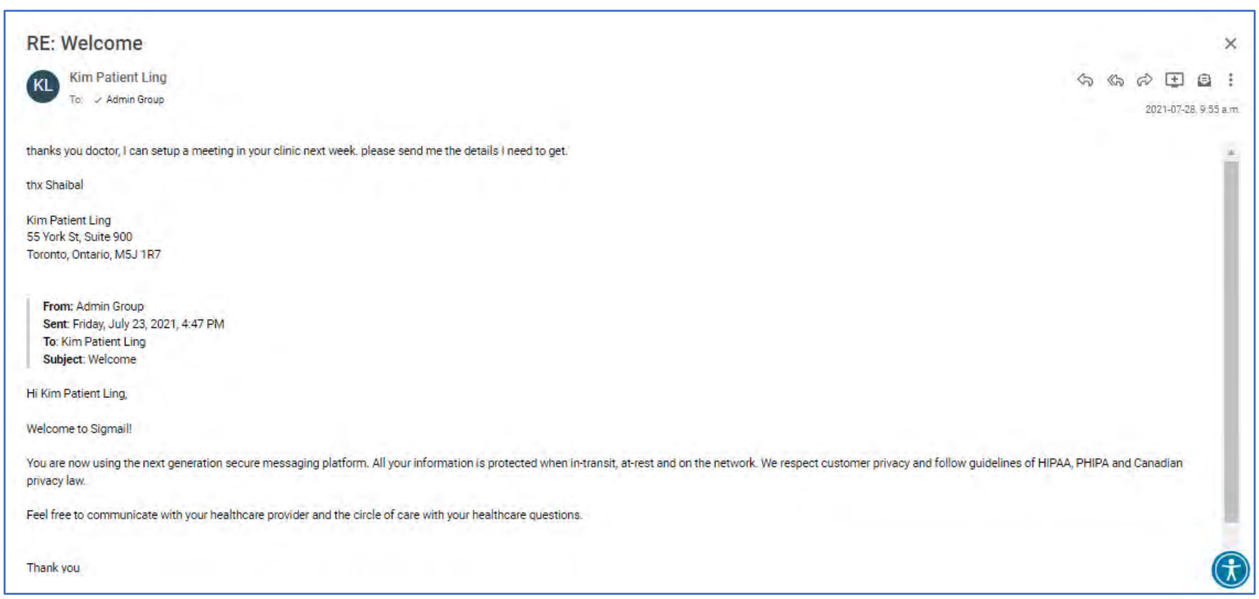
- If the message row on the List View is displayed with **bold** text, this indicates that the message is **New / Unread**.

<u>**Content View:**</u>

To view the content of a specific message:

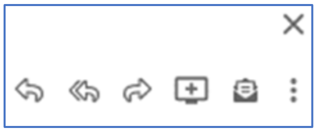
- Double-click on the desired message row within the right-hand side window.

- The right-hand side window will then retrieve and display the **Content View** of the selected message row.



To close the message and return to the List View:

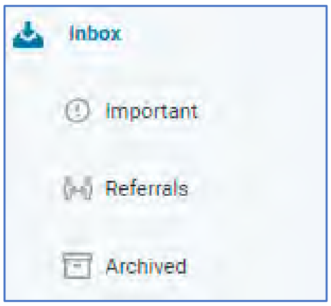
- Click the 'X' located above the toolbar located on the top-right of the window.



- The message content will close, and you will return to the List View of messages.

5.1 Personal 'Inbox' folder

Your personal **'Inbox' folder** will display the received message that were ***specifically addressed to you, not your clinic*.**



As listed in left-hand menu, your personal 'Inbox' includes:

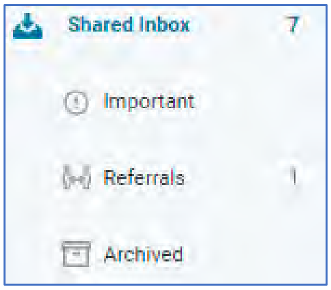
- The full **'Inbox'** view, which will list ALL messages received in your personal mailbox (that have not yet been archived)
- **'Important'** view, which will only list those messages in your personal inbox that have been flagged as 'Important'
- **'Referrals'** view, which will only list those messages in your personal inbox that are Referral requests
- **'Archived'** subfolder, which will list those messages that were received in your personal inbox but were subsequently moved to 'Archived'

You will initially land on the full '**Inbox**' view. To switch to any other view of your personal 'mailbox, click the associated folder label within this left-hand side menu.

5.2 'Shared Inbox' folder

Your **'Shared Inbox' folder** will display the 'other' messages you receive.

- ***These are message that were not addressed specifically to you***
- ***Instead, you are receiving these messages because they were sent to the Group or Clinic to which you belong. Most patient messages will be sent here.***

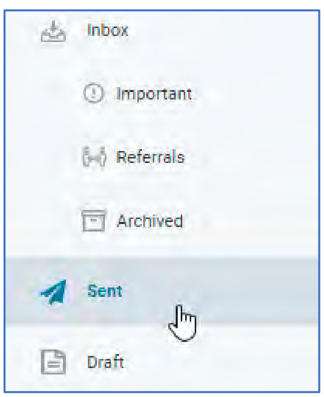


As listed in left-hand menu, your shared 'Inbox' includes:

- The full **'Shared Inbox'** view, which will list ALL messages received in your Shared Mailbox (that have not yet been archived)
- **'Important'** view, which will only list those messages in your Shared Inbox that have been flagged as 'Important'
- **'Referrals'** view, which will only list those messages in your Shared Inbox that are Referral requests
- **'Archived'** subfolder, which will list those messages that were received in your Shared Inbox but were subsequently moved to 'Archived'

5.3 'Sent' folder

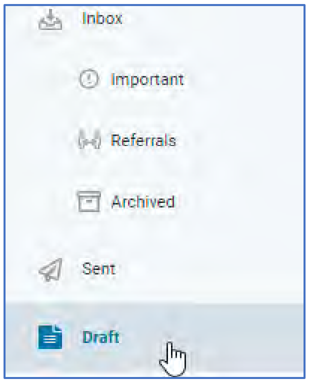
The **'Sent' folder** will contain the messages that have been sent from your SigMail account.



This folder can be used to retrieve and review previously issued messages and forward them to other SigMail users as needed.

5.4 'Draft' folder

The **'Draft' folder** will contain the messages that have been created using your SigMail account but were simply Saved (rather than Sent).



Use this folder to retrieve a previous draft message you started (so it can be completed and then sent when finished).

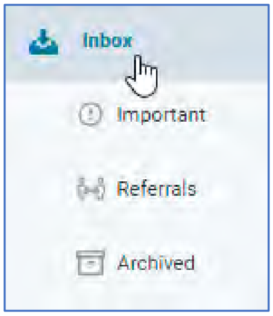
5.5 New Message

The 'Mailbox' tab page allows you to create a New Message using the ***'New Message'*** *button* located at the top of the left-hand side menu of the page.

6 Managing your Inbox Messages

To retrieve and view your Personal 'Inbox' messages:

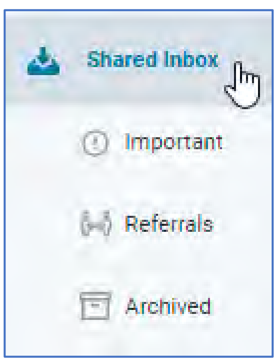
- Click on the **'Inbox'** mailbox folder label (or any of its subfolders) within the left-hand Menu List of your 'Mailbox' tab screen**.**



- The Mailbox tab window will then retrieve and display the List View of your '***Inbox***' messages on the right-hand side window of the page.

Similarly, to retrieve and view your 'Shared Inbox' messages:

- Click on the **'Shared Inbox'** mailbox folder label (or any of its subfolders) within the left-hand Menu List of your 'Mailbox' tab screen**.**



Regardless of which Inbox you retrieve, the capabilities for managing your Inbox messages are the same.

When you open either of these folders, you will first be viewing a listing of messages in that folder ('**List View'**). You can then select a specific message and open it to view its detail ('**Content View**').

The operations you can perform with your Inbox messages are slightly different depending on whether you are viewing them on a '**List View**' or viewing a single message in '**Content View**'.

6.1 'List View' Capabilities – *'Inbox' & 'Shared Inbox'*

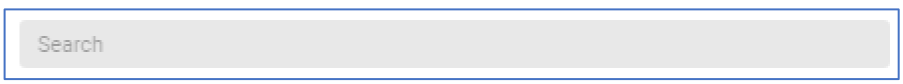
When viewing a ***List View*** of your ***Inbox*** messages (in the right-hand window):

- At the top of the right-hand side window, you are provided with a toolbar that allows you to perform several different functions while viewing the List View:

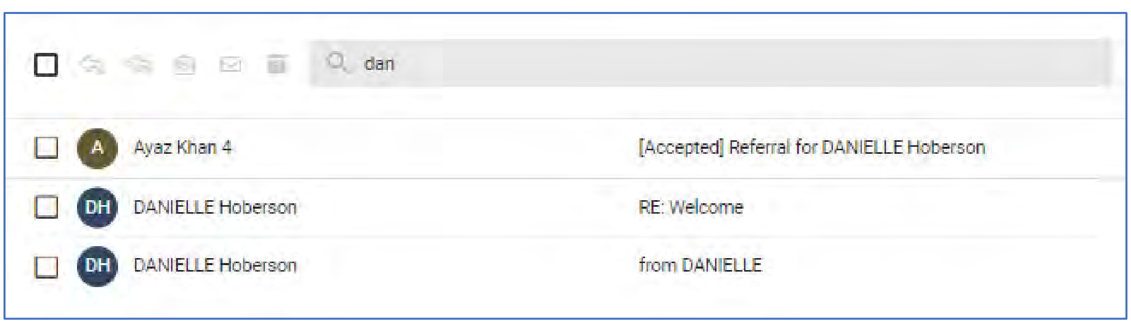
- The List View Toolbar includes:
  - *a '**Search**' textbox*
  - *a drop-down list of **selectable Filter Criteria***
  - *an icon toolbar with **Function Icons***

<u>Using the List View 'Search':</u>

- The '**Search**' box will allow you to **filter the List View based on specific text**:

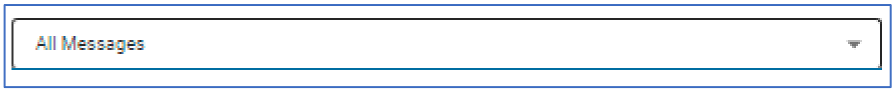


  - Start entering text within the 'Search' box.
  - As you type each character, the list will immediately be filtered to only include those messages that contain that matching character string. **Matching is performed on both the *Sender Name* column and *Subject* column values.**

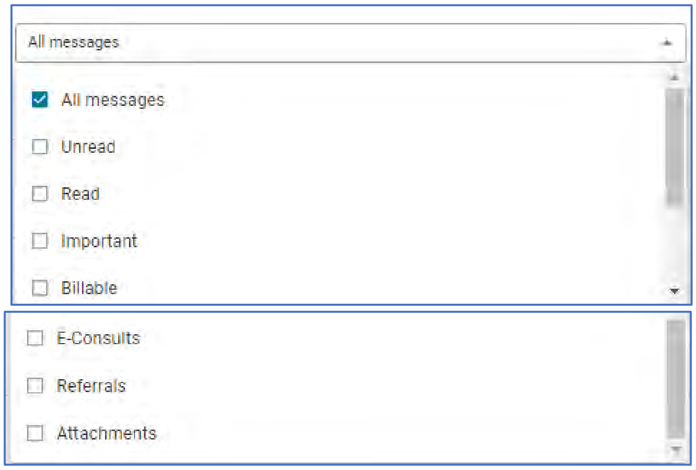


<u>Using the List View 'Filter Criteria' options (Drop-Down List):</u>

- You can use the Drop-Down list to filter the List View of message rows.

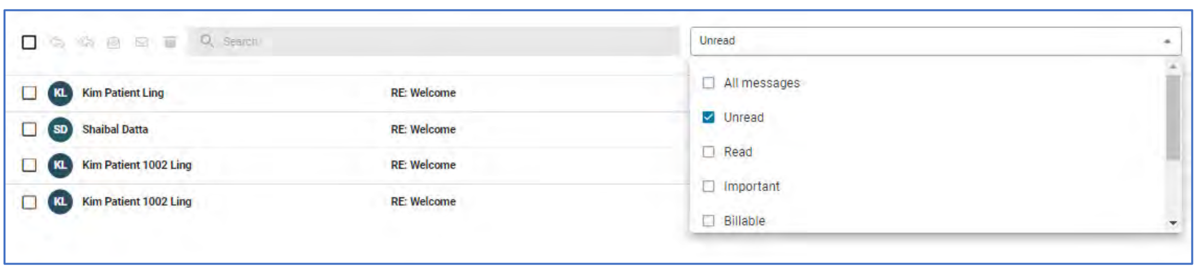


- The '*All Messages*' option will initially be selected by default.
- Click on the box to expand the list of available options.

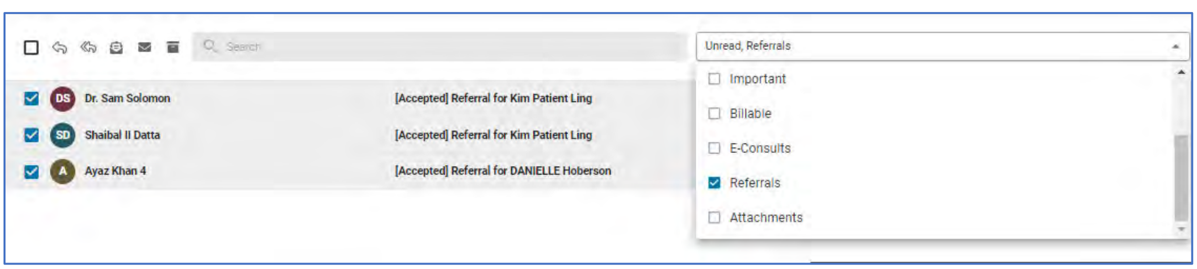


- Click on one or more filtering options on the list.
- As each option is selected, the list will immediately be filtered to only include messages that match the selected criteria.

Example 1: List View filtered for only 'Unread'



Example 2: List View filtered for 'Unread' plus 'Referral'

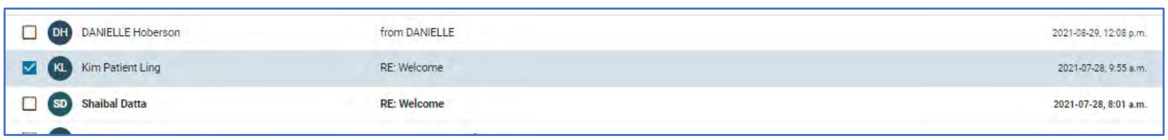


<u>Using the List View Toolbar 'Function Icons':</u>

- You can also use a set of **toolbar function icons** that are available from within the List View.

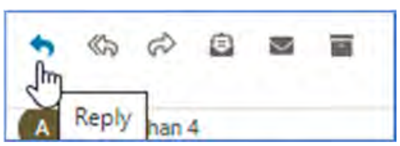
- **These functions are operations you can perform *based on a selected message from your list*.** These functions, in the order that their icons appear on the toolbar, are:
  - ***Reply***
  - ***Reply all***
  - ***Forward***
  - ***Mark Read***
  - ***Mark Unread***
  - ***Archive***

- For '***Reply***', '***Reply all***' and '***Forward***' options:
  - To use these functions, first select only a ***single message*** from the list.
  - Single-click on the message row to select and highlight it.

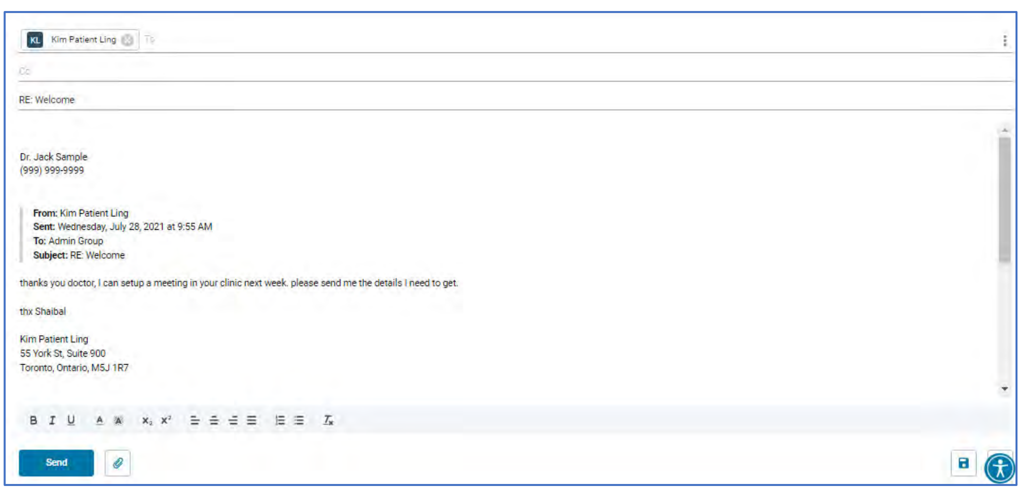


  - Then click on the toolbar icon for the function you wish to perform.

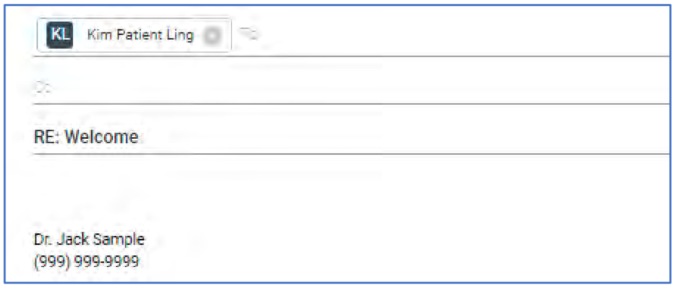
  - If you select the '***Reply***' icon:



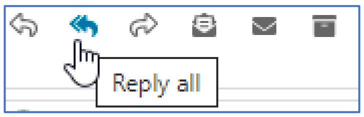
    - The right-hand side window will then be populated with a draft response for the selected message.



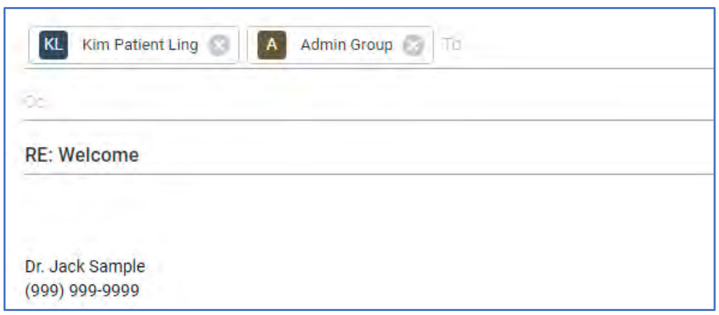
    - The 'Reply' response will be ***addressed only to the original Sender*** of the message.



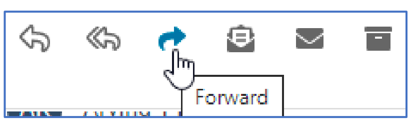
- If you select the '***Reply all***' icon:



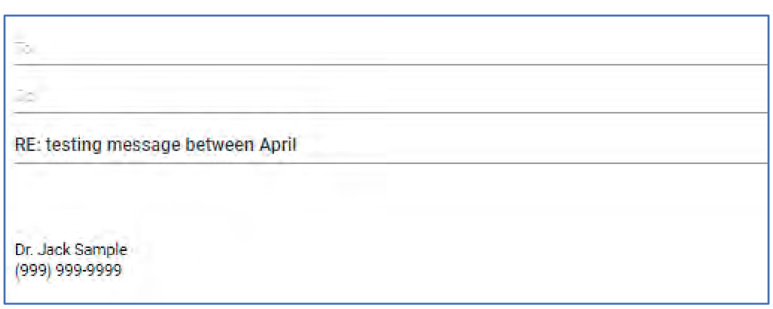
  - The right-hand side window will then be populated with a draft response for the selected message.
  - The 'Reply All' response will be ***addressed to the*** **original Sender and to all mailboxes that were sent that original message** (as either 'To' or 'Cc').



- If you select the '***Forward***' icon:



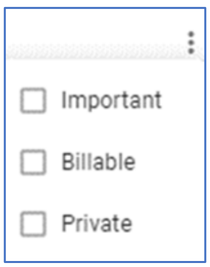
  - The right-hand side window will then be populated with a draft response for the selected message.
  - The 'Forward' response ***will not be automatically addressed***; you will manually need to enter the 'To' (and 'Cc') recipients.



- **With any of these actions (Reply, Reply All and Forward):**
  - You will then need to enter text for your response in the body of the message (in the blank area provided below the Subject).
  - You will then need to enter text for your response in the body of the message (in the blank area provided below the Subject).
  - To set **flag indicators** for the message:
    - *Click on the flag menu (located on the top-right of the message form on the 'To' line)).*

    - *The flag menu drop-down list will open.*

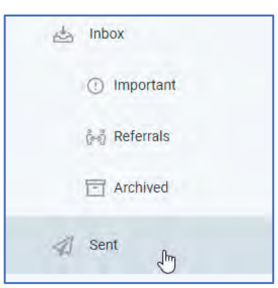
    - *Click on the appropriate option(s) to flag the message as 'Important', Billable' and/or 'Private (if applicable). The checkbox for that selected flag indicator will be set.*

  - Use the '***Send***' button to then send the message.

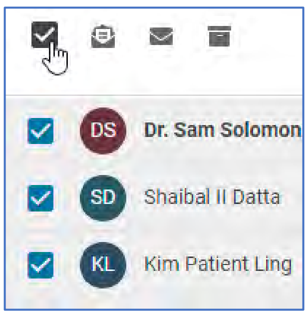
    

  - The Message Content response will then close; the right-side hand window will return to the List View of messages.
- **Once sent, the message response will be saved and viewable in your mailbox; it will be listed within your Sent message folder (accessible from the left-hand side menu).**

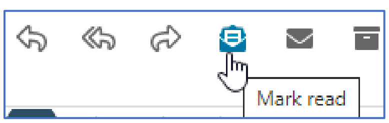


- For '***Mark Read***', ***'Mark Unread'*** and ***'Archive'*** options:
  - For these actions, you can manually select a ***single message*** *or* ***multiple messages*** *from the list.*
  - Alternatively, you can also use the ***'Select All'*** option:
    - Click on the checkbox on the left of the icon toolbar.

    - The checkbox will then be populated on the toolbar, and ***every message on the List View will be automatically selected*** for action.

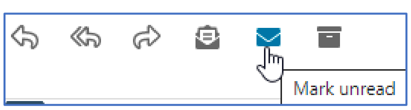


  - If you then select the '***Mark read***' icon:



    - *Any selected message that was previously 'Unread' will now be marked as 'Read' and will now appear in unbolded text on the List View.*

  - If you select the '***Mark Unread***' icon:

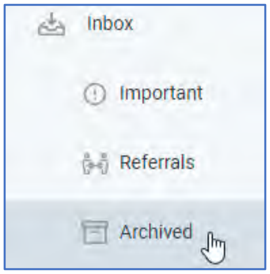


    - *Any selected message that was previously 'Read' will now be marked as 'Unread' and will be updated to bold text on the List View.*

  - If you select the '***Archive***' icon:

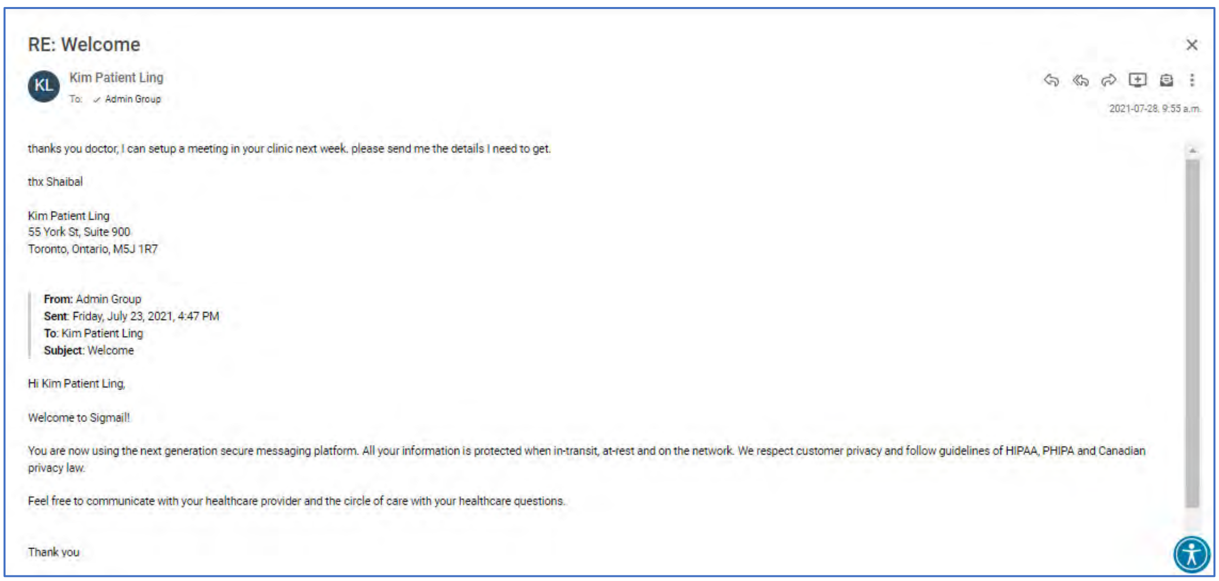
    - *Any selected message will be removed for your Inbox folder (and no longer be listed on your current List View).*

- *The selected messages will be moved to the 'Archived' subfolder of your Inbox (accessible from the left-hand side menu)..*



6.2 'Content View' Capabilities – *'Inbox' & 'Shared Inbox'*

As mentioned, when you double-click on a message row within the List View, the right-hand side window will then retrieve and display the content of that selected message row.

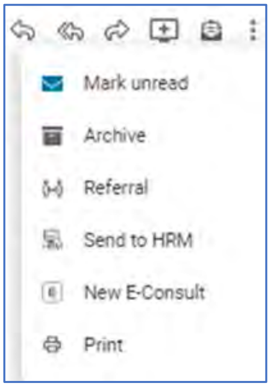


When viewing the ***Content View*** of a selected ***Inbox*** message (in the right-hand window):

- At the top of the right-hand side window, an icon toolbar is available for you to perform various functions for the selected message you are viewing.

- Additional functions of the toolbar are available by clicking on the flag icon (located at the end of the toolbar).

- A drop-down list will provide the *additional toolbar functions* that are available under the 'Content View' of a message



<u>Using the Content View Toolbar 'Icon Functions':</u>

- This icons on this toolbar are functions applicable to managing a single message, so have some differences (as compared to the List View toolbar).
- The functions, in the order the icons appear on the toolbar (or drop-down) are:
  - ***Reply***
  - ***Reply all***
  - ***Forward***
  - ***Send to Oscar EMR***
  - ***Mark Read***
  - ***Mark Unread***
  - ***Archive***
  - ***Referral***
  - ***Send to HRM***
  - ***New E-Consult***
  - ***Print***
  - ***Close***

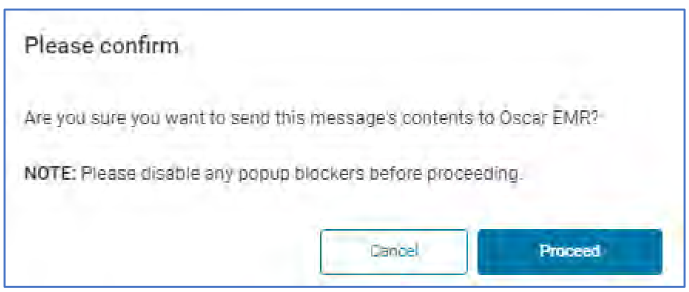
> IMPORTANT
>
> The icon functions listed above are *all possible* icons that *could* appear on the toolbar (and associated drop-down) when viewing the Content View of an Inbox message.
> However, **depending on the type of message you are viewing, you may only see a subset of these listed functions. Only the *applicable* operations for your message will be presented.**
>
> *For example, if the Inbox message you are viewing is from a Physician, the 'Referral' icon would not be included on the toolbar. Referrals are only performed for patients.*
>
> *Similarly, if the Inbox message you are viewing in Content View is an E-Consult Request that you received from another physician, the toolbar would not include icons for 'Send to Oscar EMR', 'Referral', 'Send to HRM' or 'New E-Consult'). Those are not operations you would need to perform in response to an E-Consult request.*

- For '***Reply***', '***Reply all***' and '***Forward***' options:

  - These icon functions work the same as explained above for the List View toolbar.
    - The right-hand side Content View window will be updated to display a response for that message.
    - The response will be automatically addressed based on the icon function used. (The message response will either be addressed to the Sender only, to the Sender and all original recipients, or be Unaddressed (and require the recipients to be manually entered).)
    - You will need to enter the text for your response in the body of the message and then click the 'Send' button to issue your response to the recipient(s).

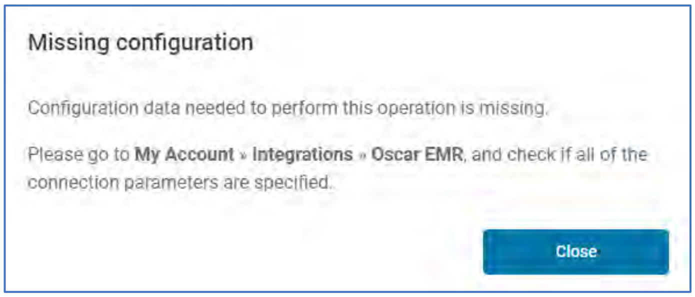
- For '***Send to Oscar EMR***':

  - If 'Send to Oscar EMR' is selected, a Confirmation pop-up window will be presented.



  - To continue, click the 'Proceed' button within the pop-up.

  - SigMail will then automatically issue the message to Oscar EMR electronically via a secure connection.

> NOTE:
>
> To connect to Oscar EMR, a login and authorization process happens as part of the transmission. The login to this third party application uses the connection parameters as defined under your SigMail account (on the 'Integrations' tab page of your 'My account' Settings window).
> If the Oscar EMR connection has not yet been configured under your account, the secure connection request will fail with the following error:
>
> 
>

- For '***Mark read***':

  - The message will now be marked as *Read*.

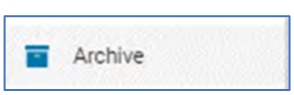
    NOTE: If you are viewing an Inbox message in 'Content View'; the message has already been opened and updated as 'Read'. Using this action (to re-mark the message as Read) will have no effect. You will continue to remain on the message until you take further action or close the message.

- For '***Mark unread***' (via drop-down menu selection):

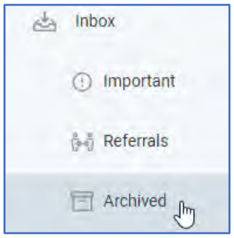
  - The Content View of that message will close, returning you to the List View within the right-hand side window.
  - The message will now be marked as Unread; it will now appear in bold text on the List View.

- For ***'Archive'*** (via drop-down menu selection):

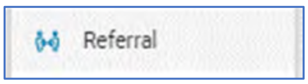
  

  - The Content View of that message will close, returning you to the List View within the right-hand side window.

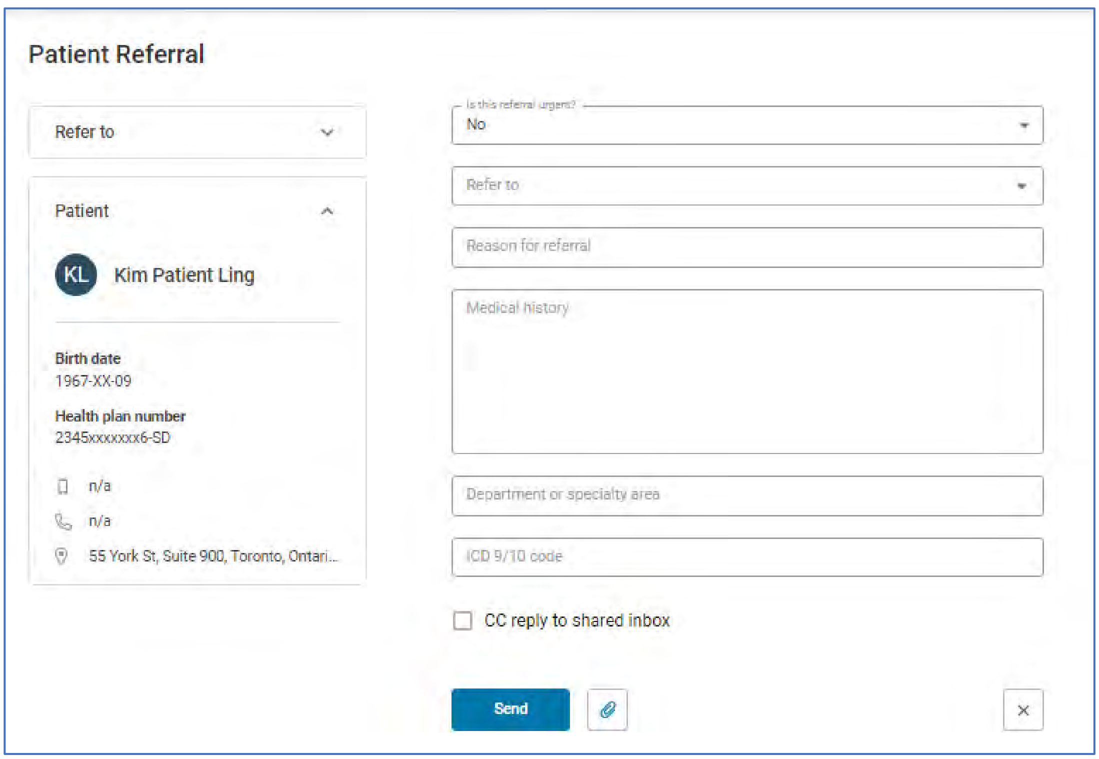
- The message will no longer appear on the List View of your full Inbox folder; it will have been moved to the 'Archived' subfolder.



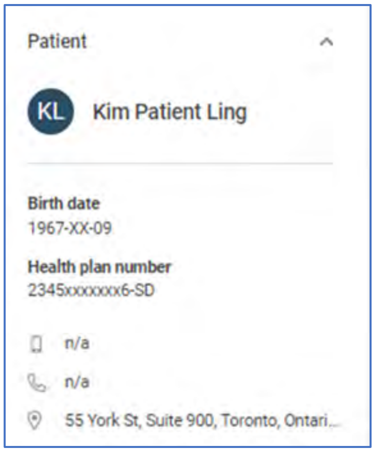
- For '***Referral***' (via drop-down menu selection):



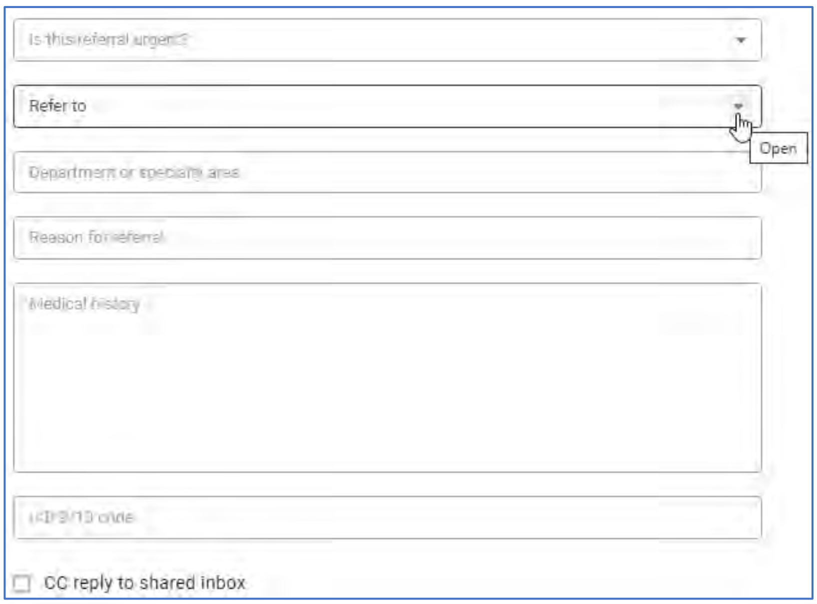
- A draft Patient Referral will be automatically created.
  - The right-hand side window will no longer display the message content. Instead, a *'Patient Referral' Request form* will be displayed.



  - The request form will be partially pre-populated. The *'Patient' area* on the left-side of the request form will be pre-populated with the patient information. (This person is the *Sender* of the SigMail message that was being viewed when the Referral was initiated. The information is retrieved from that user's SigMail account profile and automatically populated on the form.)

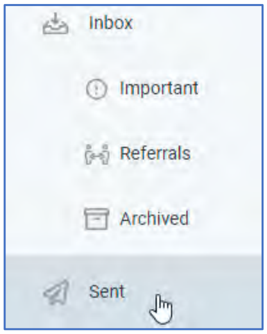


- The Referral Request details will need to be completed using the provided fields. *This includes specifying the Physician that the patient is being referred to (by selecting the Physician using the '**Refer to**' field drop-down list).*



- Once the remaining details are completed, click the '*Send*' button to issue the referral.

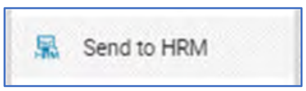
- The Referral Request form will then be closed, returning you to the List View of your inbox within the right-hand side window.
- The Referral message will be sent to the specified Physician. You can now view that Referral message under the 'Sent' folder of your mailbox (accessible on the left-hand side menu of your mailbox screen.



NOTE

For full details on completing and sending this Referral form, refer to Section 11.4.4 ('Referring a Patient') below.

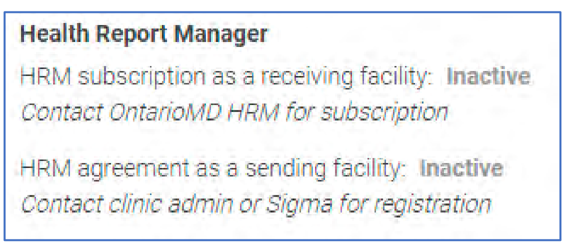
- For '***Send to HRM*** (via drop-down menu selection):



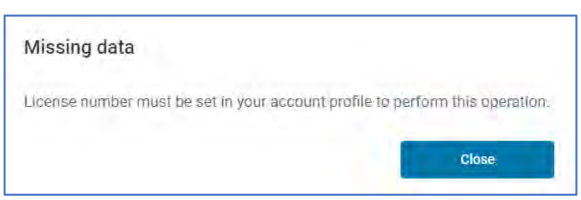
- The message will be automatically issued to HRM electronically.
- The Content View of that message will close, returning you to the List View within the right-hand side window.

NOTE:

To utilize this option, the HRM Subscription (as a receiving facility) and HRM agreement (as a sending facility) should be Active under your account (on the 'Integrations' tab page of your 'My account' Settings window). Please contact support to enable this.



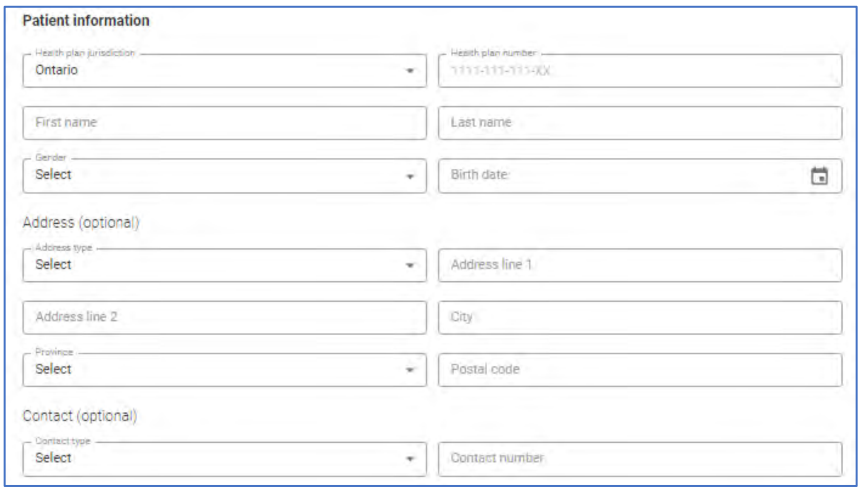
In addition, a License Number must be specified for your account (on your 'Profile' tab page of your 'My account' Settings window).
If these details are not configured, the request will fail:



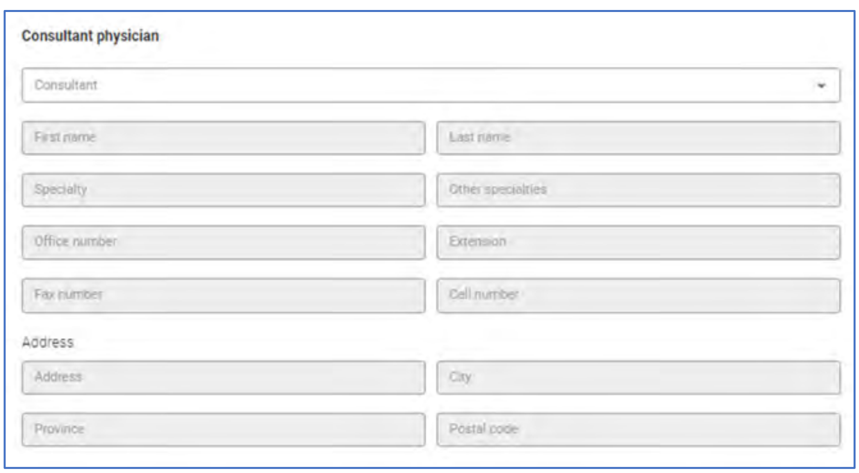
- For '***New E-Consult***' (via drop-down menu selection):

  - A draft E-Consult request will be automatically created.
    - The right-hand side window will no longer display the message content. Instead, a *'E-Consult' Request form* will be displayed.

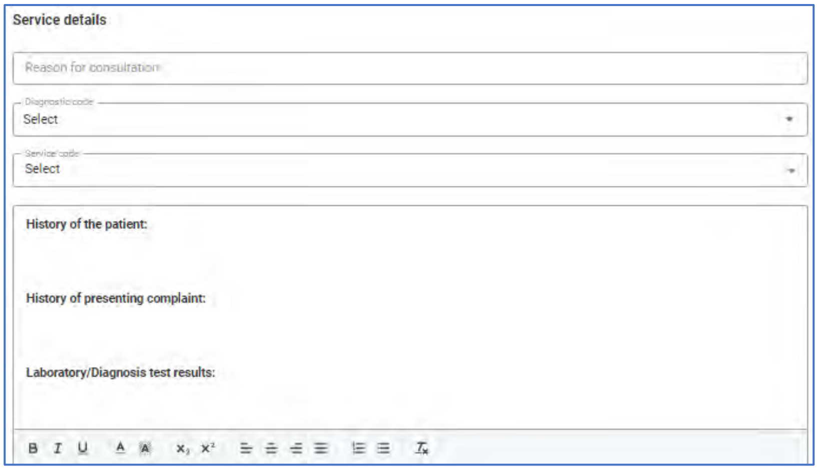
  - The form has *three* sections to complete:
    - *a 'Patient information' section*



    - *a 'Consultant physician' section*



    - *a 'Service details' section*

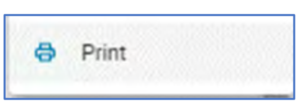


- The request form will be partially pre-populated. **The area of the form that is pre-populated will *depend on the SigMail message from which you initiated the New E-Consult.***
    - *If the Sender of the SigMail message was a Physician, then the 'Consultant physician' area of the E-Consult form will be pre-populated (using that user's SigMail account profile information.)*
    - *Complete the 'Patient information' and 'Service details' areas.*
    - *Alternatively, if the Sender of the SigMail message was a Patient, then the 'Patient information' area of the E-Consult form will instead be pre-populated (using that user's SigMail account profile information.)*
    - *Select the 'Consultant physician' and complete the 'Service details' section.*

- Once you have completed all *three* sections, click the '***Send***' button to issue the E-Consult (and return to the Inbox List View).

> NOTE
>
> For full details on completing and sending this E-Consult form, refer to Section 11.1.3 ('Sending an E-Consult from the 'Physician' Contact List') and/or Section 11.4.9 ('Sending an E-Consult') below.

- For '***Print***' (via drop-down menu selection):



- The Message Content of the message will be printed. The print request will be transmitted to your local printer.

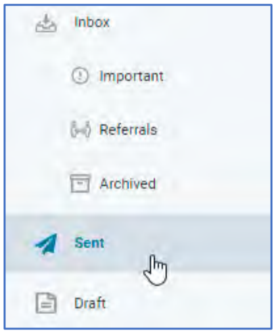
- For ‘***Close***’:

  - Click the Close (‘X’) icon located above the toolbar This icon is used to close the displayed message.
  - The Content View of the message will close; the right-hand window will return to the List View of your mailbox.

7 Managing your 'Sent' Messages

To retrieve and view your 'Sent' messages:

- Click on the **'Sent'** mailbox folder label within the left-hand Menu List of your 'Mailbox' tab screen**.**

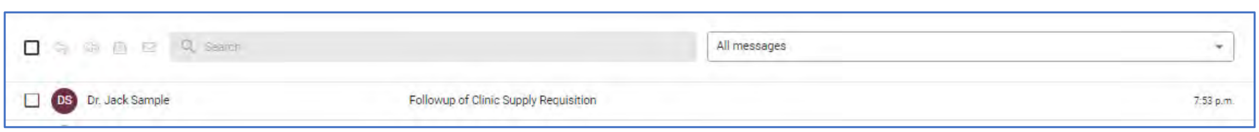


- The Mailbox tab window will then retrieve and display your '***Sent***' messages (in the right-hand side window of the page). You will first be viewing a listing of messages in that folder ('***List View'***).
- You can then select a specific message and open it to view its detail ('***Content View'***).

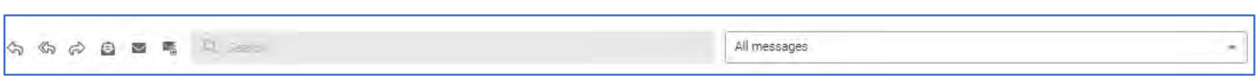
The operations you can perform with your Sent messages are slightly different depending on whether you are viewing them on a '**List View**' or viewing a single message in '**Content View**'.

7.1 'List View' Capabilities – 'Sent' folder

When viewing a List View of your '**Sent**' messages (in the right-hand window):



- At the top of the right-hand side window, you are provided with a toolbar that allows you to perform several different functions while viewing the 'Sent' List View:



- The List View Toolbar includes:

- *a '**Search**' textbox*
- *a drop-down list of **selectable Filter Criteria***
- *an icon toolbar with **Function Icons***

You will notice that this toolbar provides similar options as are available for managing the List View of your 'Inbox' (as explained above).

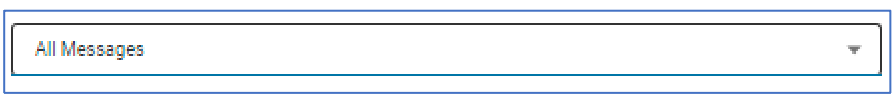
<u>Using the List View 'Search':</u>

- The '**Search**' box will allow you to **filter the 'Sent' List View based on specific text**:

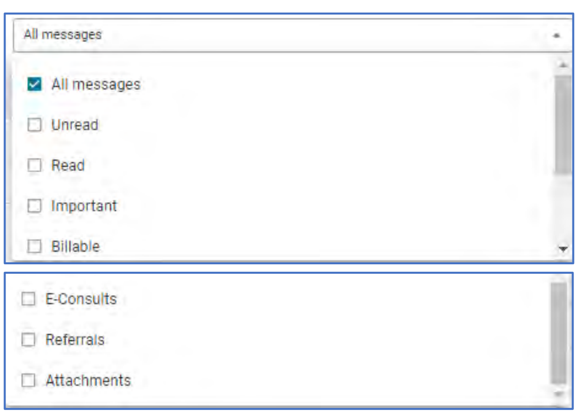
  - Start entering text within the 'Search' box.
  - As you type each character, the list will immediately be filtered to only include those messages that contain that matching character string. **Matching is performed on all list column values (*Recipient Name* (Sent 'To'), *Subject and Date)* column values.**

<u>Using the List View 'Filter Criteria' options (Drop-Down List):</u>

- You can use the Drop-Down list to filter the List View of message rows.



  - The '*All Messages*' option will initially be selected by default.
  - Click on the box to expand the list of available options.



  - Click on one or more filtering options on the list.
  - As each option is selected, the list will immediately be filtered to only include Sent messages that match the selected criteria.

Using the List View Toolbar 'Icon Functions':

- You can also use a set of **toolbar icon functions** that are available from within the List View of Sent messages.

▪ **These icon toolbar functions are operations you can perform *based on a selected message from your Sent list*.** These functions, in the order that their icons appear on the toolbar, are:

- ***Reply***
- ***Reply all***
- ***Forward***
- ***Mark Read***
- ***Mark Unread***
- ***Recall ****

> * NOTE:
>
> These are the same options available on the 'Inbox' List View toolbar (as explained above). However, this toolbar has a 'Recall' function (replacing the Archive option).

▪ For '***Reply***', '***Reply all***' and '***Forward***' options:

- To use these functions, first select only a ***single message*** from the list. Single-click on the message row to select and highlight it.
- Then click on the toolbar icon for the function you wish to perform.

- *If you select the '**Reply**' icon:*
  - *The right-hand side window will then be populated with a draft response for the selected message. The new 'Reply' response will be **addressed only to the original Recipient ('To')** of the selected message.*

- If you select the '***Reply all***' icon:
  - *The right-hand side window will then be populated with a draft response for the selected message. The new 'Reply All' response will be **addressed to the original Recipient ('To') plus all mailboxes that were copied ('Cc')** on the selected message.*

- If you select the '***Forward***' icon:
  - The right-hand side window will then be populated with a draft response for the selected message.

- The 'Forward' response ***will not be automatically addressed***; you will manually need to enter the 'To' (and 'Cc') recipients.

- **With any of these actions (Reply, Reply All and Forward):**
  - You will then need to enter text for your response in the body of the message (in the blank area provided below the Subject).
  - Use the '***Send***' button to then send the message.

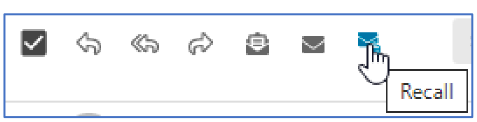
  - The Message Content response will then close; the right-side hand window will return to the List View of Sent messages.
- **Once sent, the message response will be saved; it will now be added/viewable on list of Sent messages.**

▪ For '***Mark Read***', '***Mark Unread'*** and '***Recall***' options:
  - For these actions, you can manually select a ***single message*** *or* ***multiple messages*** *from the list.* Alternatively, you can also use the ***'Select All'*** option (checkbox on the left of the icon toolbar) to select *every message on the List View* for action.

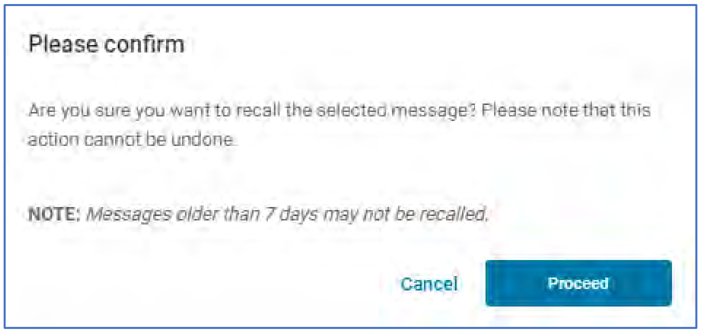
- If you then select the ***'Mark read***' icon:
  - *Any selected message that was previously 'Unread' will now be marked as 'Read' and will now appear in unbolded text on the List View.*

- If you select the '***Mark Unread***' icon:
  - *Any selected message that was previously 'Read' will now be marked as 'Unread' and will be updated to* ***bold*** *text on the List View.*

- If you then select the ***'Recall***' icon:



  - *A pop-up window will be presented for you to confirm that you wish to recall the selected message(s).*

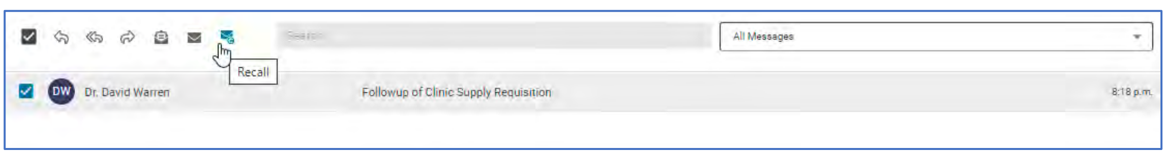


- *To complete the Recall action, click the '**Proceed**' button.*

- *The pop-up window will close, returning you to the **List View** of your 'Sent' mailbox folder.*
- *The selected message(s) will now be recalled.*
    - *You will notice that the **message row on the list will now be protected** (and displayed with faded text font).*
    - ***The message Subject will no longer appear; it will be replaced to indicate 'message recalled'.***

Example:

Sent message - List View row – before Recall



Sent message – List View row – after Recall

TIPS:

The 'Recall' function is non-reversible. Once a message is recalled, it is no longer viewable. The message row will remain on the List View for informational purposes only. The row will become protected on the list and can no longer be opened to view or available for further action.

The Recall capability is only available for up to 7 days after its Sent Date. Any message that is older than 7 days cannot be recalled.

7.2 'Content View' Capabilities – *'Sent' folder*

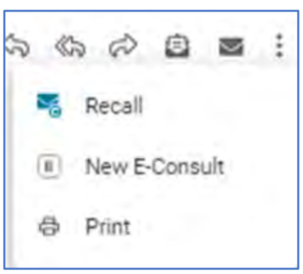
When you double-click on a message row within the List View, the right-hand side window will then retrieve and display the content of that selected message row.

When viewing the ***Content View*** of a selected ***'Sent'*** message (in the right-hand window):

- At the top of the right-hand side window, an icon toolbar is available for you to perform various functions for the selected message you are viewing.

- Additional functions of the toolbar are available by clicking on the flag icon (located at the end of the toolbar).

- A drop-down list will provide the *additional toolbar functions* that are available under the 'Content View' of a message



<u>Using the Content View Toolbar 'Icon Functions':</u>

- This icons on this toolbar are functions applicable to managing a single message, so have some differences (as compared to the List View toolbar).
- These functions, in the order that their icons appear on the toolbar, are:
  - ***Reply***
  - ***Reply all***

- ***Forward***
- ***Mark read***
- ***Mark unread***
- ***Recall***
- ***New E-Consult***
- ***Print***
- ***Close***

> IMPORTANT
>
> The icon functions list above (and discussed below) are *all possible* icons that could appear on the toolbar (and associated drop-down list) when viewing the Content View of a Sent message.
>
> However, **depending on the type of message you are viewing, you may only see a subset of these listed functions. Only the *applicable* operations for your message will be presented.**
>
> For example, if the Sent message you are viewing in Content View was an Event Request to another physician, the 'New E-Consult' icon would not be included on the toolbar drop-down since it is not applicable to scheduling a meeting.

- For '***Reply***', '***Reply all***' and '***Forward***' options:

  - These icon functions work the same as explained above for the List View toolbar.
    - *The right-hand side Content View window will be updated to display a response for that message.*
    - *The response will be automatically addressed based on the icon function used.*
      - *A 'Reply' response will be addressed only to the original Recipient ('To') of the selected message.*
      - *A 'Reply All' response will be addressed to the original Recipient ('To') plus all mailboxes that were copied ('Cc') on the selected message.*
      - *A 'Forward' response will not be automatically addressed; you will manually need to enter the 'To' (and 'Cc') recipients.*
    - You will need to enter the text for your response in the body of the message and then click the 'Send' button to issue your response to the recipient(s).

- For '***Mark read***':

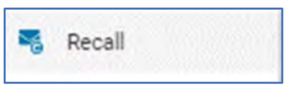
  - The message will now be marked as *Read*.

NOTE: If you are viewing an Inbox message in 'Content View'; the message has already been opened and updated as 'Read'. Using this action (to re-mark the message as Read) will have no effect. You will continue to remain on the message until you take further action or close the message

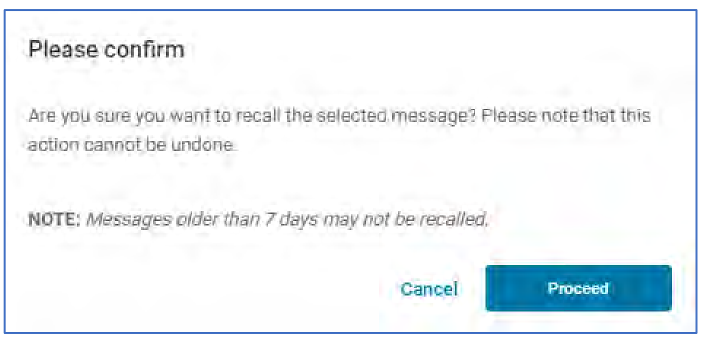
- For '***Mark Unread***':

  - The Content View of that message will close within the right-hand side window, returning you to the List View of your 'Sent' messages.
  - The message will now be marked as unread; it will now appear in bold text on the List View.

- For ***'Recall'*** (via drop-down menu selection):



  - Like the *Recall* function on the *List View* toolbar (explained above), a pop-up window will be presented for you to confirm that you wish to recall the selected message.



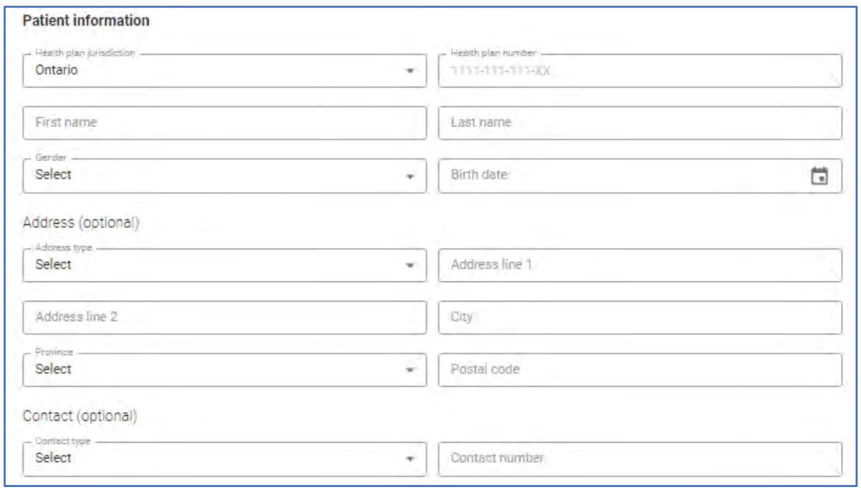
  - *To complete the Recall action, click the '**Proceed**' button.*

  - *The pop-up window will close, and the selected message(s) will now be recalled.*
  - *The **Content View** of the message you were viewing/recalling will automatically close; you will instead be returned to the **List View** of your 'Sent' mailbox folder.*
    - *You will notice that the **message row on the list will now be protected** (and displayed with faded text font).*
    - ***The message Subject will no longer appear; it will be replaced to indicate 'message recalled'.***

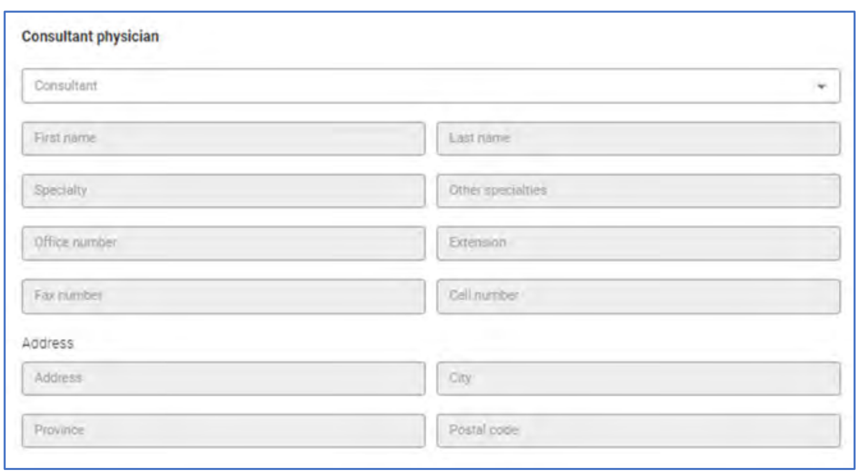
- For '***New E-Consult***' (via drop-down menu selection):

- A draft E-Consult request will be automatically created.
    - The right-hand side window will no longer display the message content. Instead, a *'E-Consult' Request form* will be displayed.

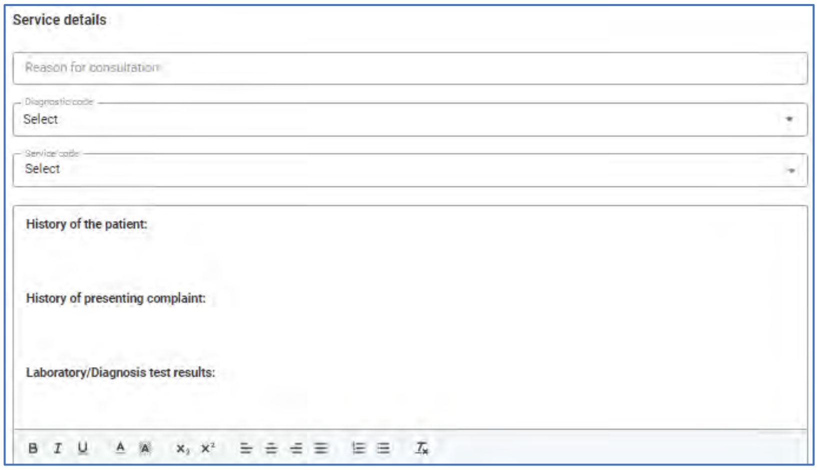
- The form has *three* sections to complete:
    - *a 'Patient information' section*



- *a 'Consultant physician' section (for selecting the Consultant physician)*



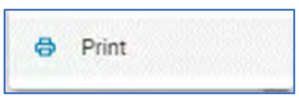
- *a 'Service details' section*



- Once you have completed all *three* sections, click the '***Send***' button to issue the E-Consult (and return to the List View of *Sent* mailbox)..

NOTE: For full details on completing and sending this E-Consult form, refer to Section 11.1.3 ('Sending an E-Consult from the 'Physician' Contact List') and/or Section 11.4.9 ('Sending an E-Consult') below.

- For '***Print***' (via drop-down menu selection):



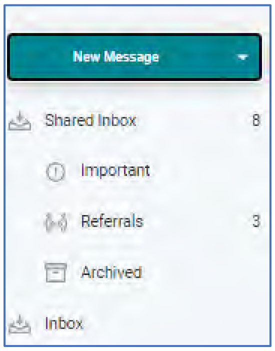
  - The Message Content of the message will be printed. The print request will be transmitted to your local printer.

- For '***Close***':

  - Click the Close ('X') icon located above the toolbar This icon is used to close the displayed message.
  - The Content View of the message will close; the right-hand window will return to the List View of your Sent mailbox.

8 Composing a New Message

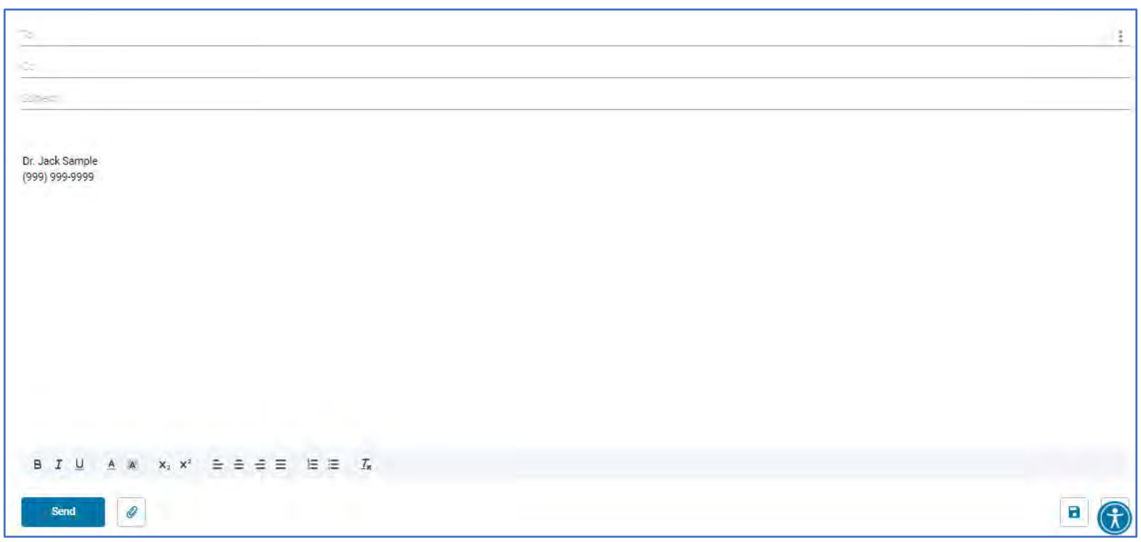
The **'Mailbox' tab page** allows you to create a New Message using the '***New Message***' *button* located at the top of the left-hand side menu of the page.



Composing a New Message:

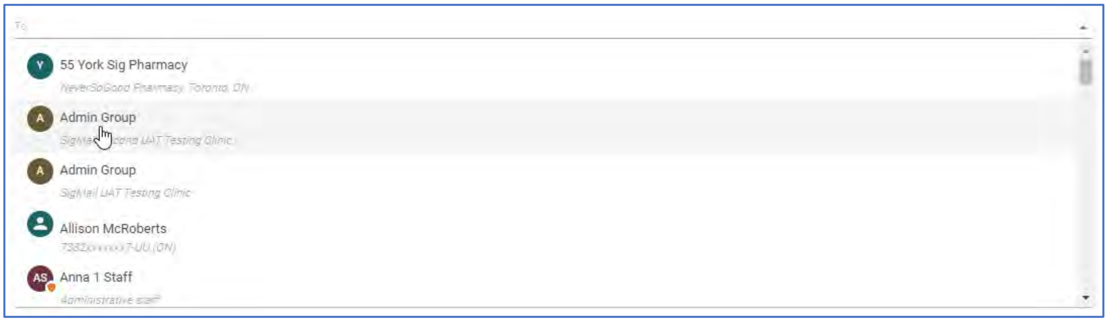
- Click the '***New Message'*** *button* within the left-hand side window.

- The right-hand side window will then display a draft message form.



- Complete the details at the top of the message form:

- *Specify the '**To**' recipient for the message. Click on the field and a drop-down list of your available Contacts is provided. Click on a selected contact to select it.*

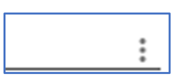


- *Specify any '**Cc**' recipients for the message (if applicable). Clicking on this field will also provide a drop-down list of your available Contacts to select from.*
- *Enter the '**Subject**' for the message.*
- *Next, **enter the content for the body of your message** in the blank area provided (below the 'Subject' line).*
    - A formatting toolbar is provided at the bottom of the form to assist you in formatting the text of your message.

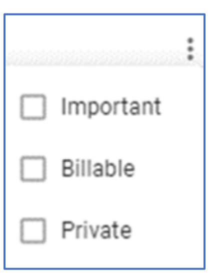
- *Your personal **Message Signature** will be automatically populated at the bottom of the message (if configured for your SigMail account). Otherwise, you will need to manually enter your Signature detail.*

> *TIP: Configuring your Message Signature can be done using the **'Preferences' tab** of the **'My account' page**.*

- To set **flag indicators** for the message:
    - *Click on the flag menu (located on the top-right of the message form on the 'To' line)).*



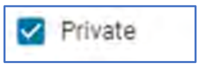
- *The flag menu drop-down list will open.*



- *Flag the message as '**Important**' (if applicable) by clicking on that option on the drop-down; the checkbox for that flag indicator will be set.*

- *Flag the message as '**Billable**' (if applicable) by clicking on that option on the drop-down; the checkbox for that flag indicator will be set.*

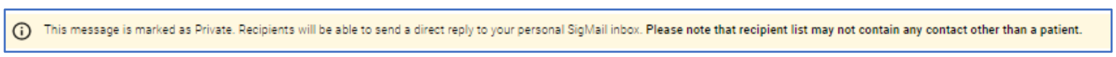
- *Flag the message as '**Private**' (if applicable) by clicking on that option on the drop-down; the checkbox for that flag indicator will be set.*



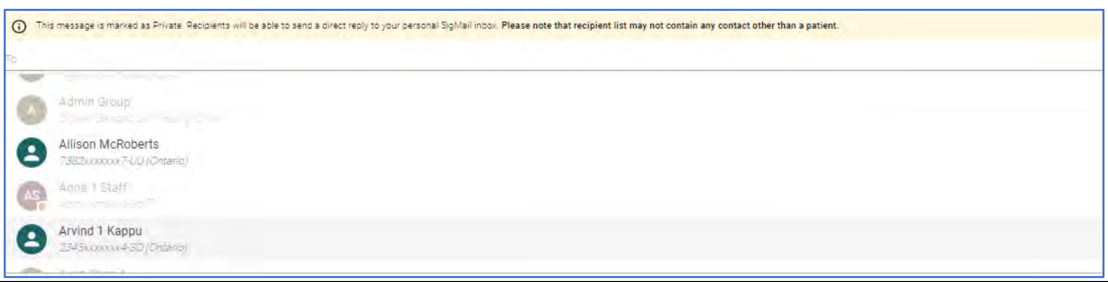
NOTE:

Private messaging allows a patient to privately and directly communicate with you as their physician. Messages marked as Private allow the recipient to send a direct reply to your personal SigMail Inbox instead of the Shared Inbox.

Be sure you are selecting only a Patient contact as the recipient ('To') for Private message.



Once the 'Private' flag is set, you will only be able to select a Patient as the recipient. (When you click on the **To**' field, the drop-down list of your Contacts will be filtered. Only Patient contacts will be enabled; other contact types will be protected from selection.)



- *Once you have set any flag indicators on the drop-down, clicking anywhere on the message form to close the menu.*

- To **attach documents** to your message:
  - *Click on the 'Attach documents' button at the bottom of the message form (located beside the 'Send' button).*

- *This will open a pop-up window of your computer's file folders (for you to select the document(s) you wish to attach.)*

> *NOTE:*
>
> *This would typically be used for securely exchanging images, medical form, requisitions and/or test results (such as blood pressure, EKG strips, heart rates, and oxygen levels) with a patient or with other physicians.*

Once you have completed all details for the message content:

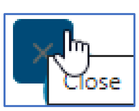
- ***To send the message***
  - *Click the '**Send**' button.*

  - *The message will then be sent and saved; it will be viewable under the 'Sent' folder of your inbox.*

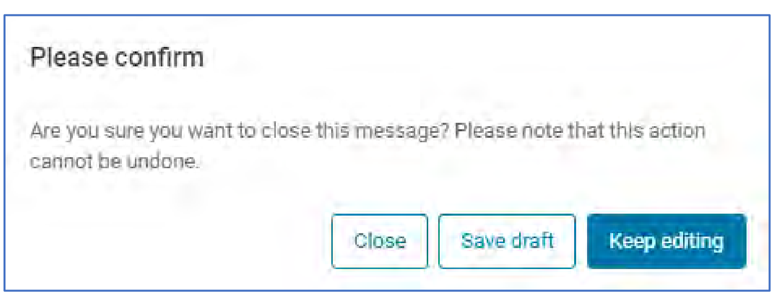
- ***To save the message as a Draft (without sending):***
  - *Click the '**Save as draft**' button (located on the bottom-right of the message form).*

  - *The message will then be saved for future completion; it can be available under the 'Draft' subfolder of your inbox.*

- ***To discard the message (close without saving):***
  - *Click the 'Close' button (located on the bottom-right of the message form).:*



  - *A pop-up window will be presented for you to confirm the action.*



- *If you click the 'Close' button, your message draft will be closed without saving (deleted).*

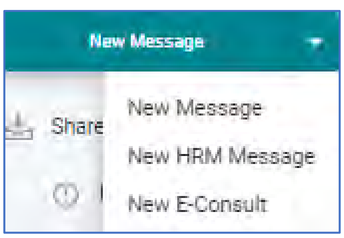
- *If you click the 'Save draft' button, your message draft will be closed and saved for future completion; it will be available under the 'Draft' subfolder of your inbox.*

- *If you click the 'Keep editing' button, the pop-up window will simply close, returning you to the draft message for you to continue editing it.*

NOTE

If the 'New Message' is to be sent as an HRM Message (rather than as a regular message):

- *Click the drop-down arrow within the '**New Message**' button. Click the '**New HRM message**' option on this menu.*



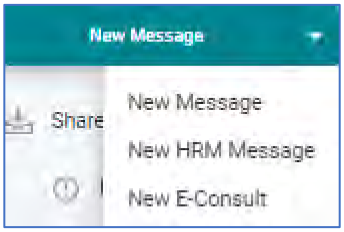
To utilize this option, the HRM Subscription (as a receiving facility) and HRM agreement (as a sending facility) should be Active under your account (on the 'Integrations' tab page of your 'My account' Settings window). In addition, a License Number must be specified for your account (on your 'Profile' tab page of your 'My account' Settings window).

If these details are not configured, you cannot use the 'New HRM message' option. Please contact support to have this feature added

NOTE

If the 'New Message' is to be sent as an E-Consult to another physician (rather than as a regular message):

- Click the drop-down arrow within the 'New Message' button. Click the 'New E-Consult' option on this menu.

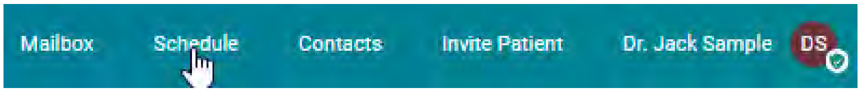


- The right-hand side window will then display a draft E-Consult form (rather than the message form).

- For details on completing and sending this E-Consult form, refer to Section 11.1.3 ('Sending an E-Consult from the 'Physician' Contact List') below.

9 Using your 'My Schedule' (Personal Timetable)

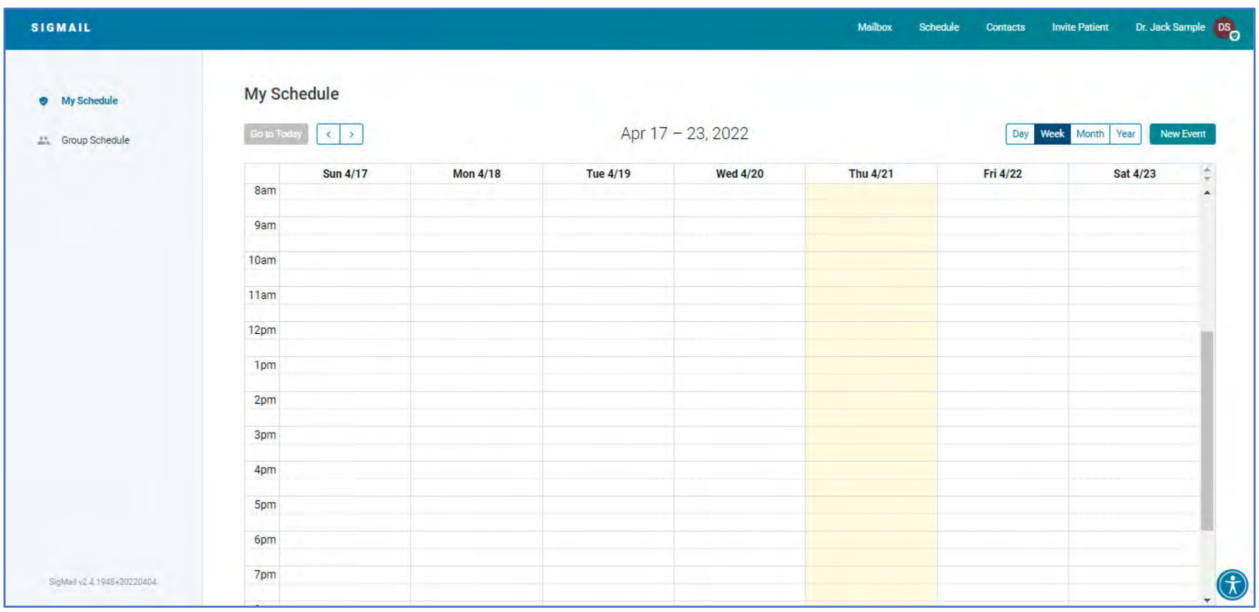
You can access your **'Schedule' tab page** using the toolbar at the top of the SigMail window.



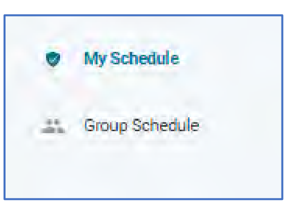
The **'Schedule'** tab page consists of two separate schedule views:

- *a **'My Schedule' view** which displays your own **Personal Calendar** of activity*
- *a **'Group Schedule' view** which displays a **combined calendar of all Members** within your contact Group*

You will initially land on the 'My Schedule' view when accessing this tab page.



To switch between the two views, use the menu provided on the left-hand side of the screen.

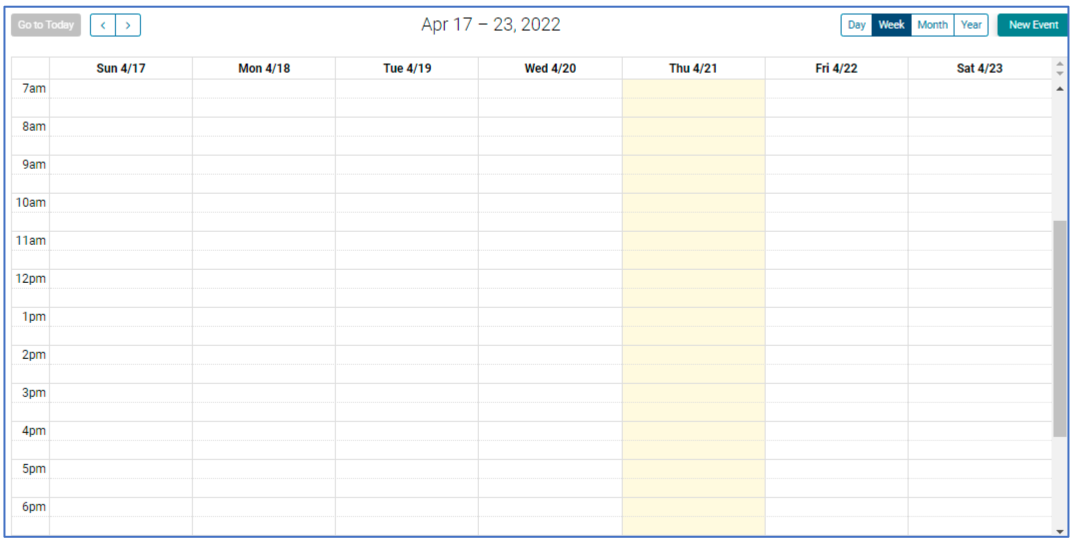


9.1 Navigating and Understanding 'My Schedule'

The left-hand side of the '***Schedule***' tab page displays the timetable grid for the selected schedule view.

When you initially access the **'*My Schedule'* *view*** on this page:

- the schedule grid will be in the ***Week*** timetable format (Sunday to Saturday).
- The ***current*** *workweek* will be displayed).
- The date column for ***today (current date) will be shaded in orange***.

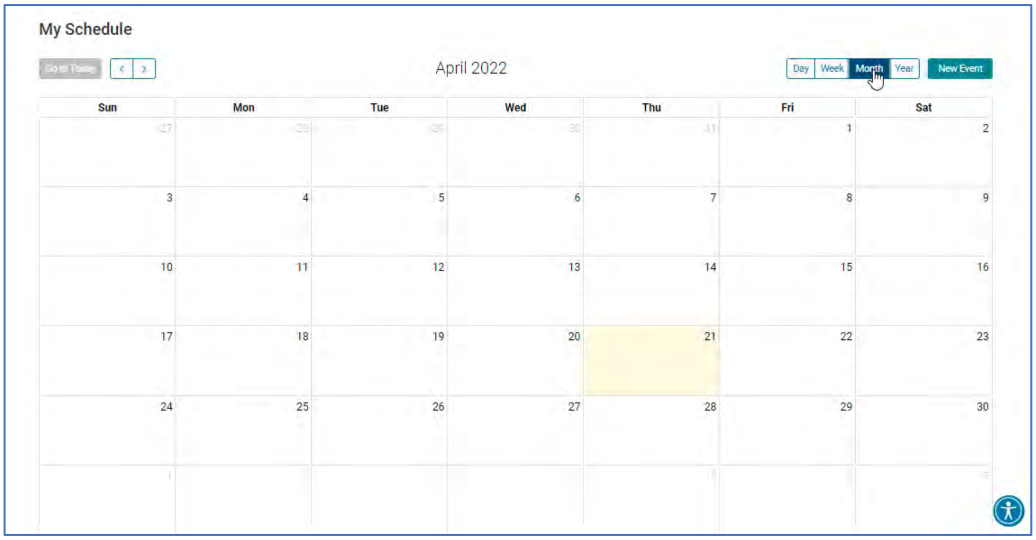


The ***Week*** timetable format is pre-selected and shown by default. However, a ***Month*** format, ***Year*** format and single ***Day*** format are also available.

- To switch the timetable format to a different timetable view, click the desired ***format button*** (at the top-left above the timetable grid).

- The right-hand side of the window will then display the alternate format that was chosen.

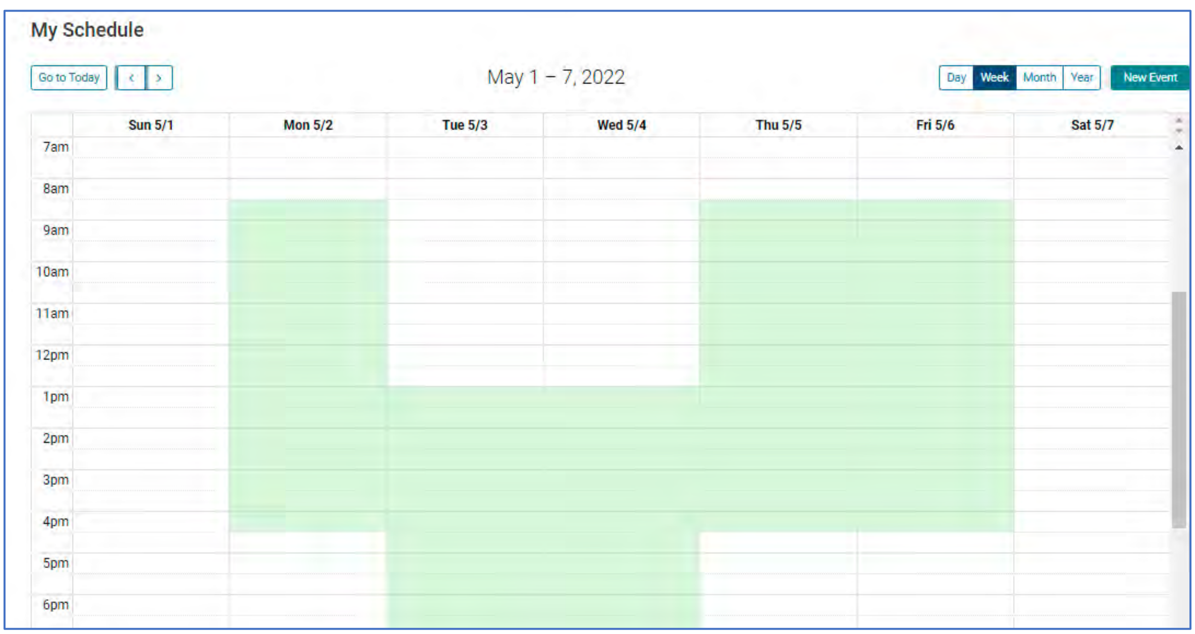
*Example: **Month** format of '**My Schedule**' timetable grid*



To view a ***different workweek*** of the calendar:

- use the ***arrow buttons*** (at the top-left above the timetable grid) to move forward or backward by calendar week.

If you have already populated your ***Work Schedule*** for this workweek, your work hours will be displayed as ***green shaded*** timeslots within the grid.



(Refer to the chapter entitled "Adding your 'Work Schedule' to SigMail Calendars" in this guide.)

9.2 Scheduling Events using 'My Schedule'

You can use the 'My Schedule' to mark events or other activities using your personal 'My Schedule' view.

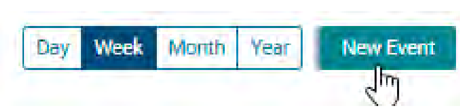
Scheduling events using your 'My Schedule' would normally be done when you wish to simply mark those timeslots as busy on your calendar (so that other members will know you are unavailable for scheduling meetings or video visits during those timeslots).

In contrast, when booking meetings or video visits with other members of your SigMail Group, you would usually book these events using your 'Group Schedule' view instead. In that view you will see a combined calendar of all members. This allows you to determine available meeting timeslots (because you can see when all invitees are *simultaneously* available in that calendar view).

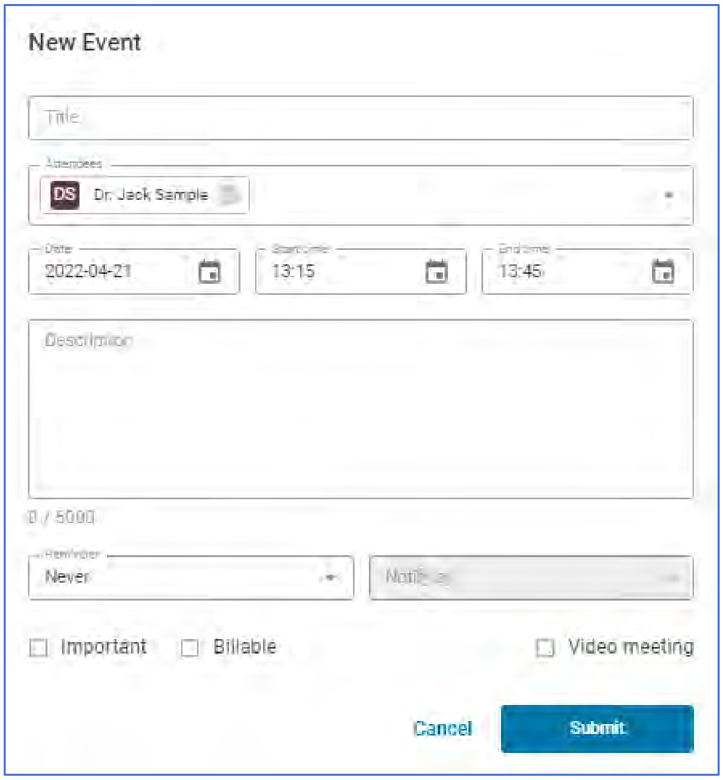
9.2.1 Add a New Event

To **add an Event** to your calendar:

- Click the **'New Event' button** that is available above the timetable grid on the right-hand side:



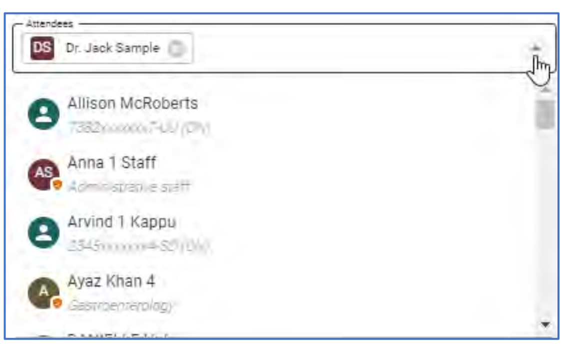
- A **'New Event' pop-up window** will be presented for you to enter the details of the Event.



- Enter a ***Title*** to describe the event. The title should be concise but meaningful, as it will be used to label the meeting timeslot when it appears on your calendar grid view.

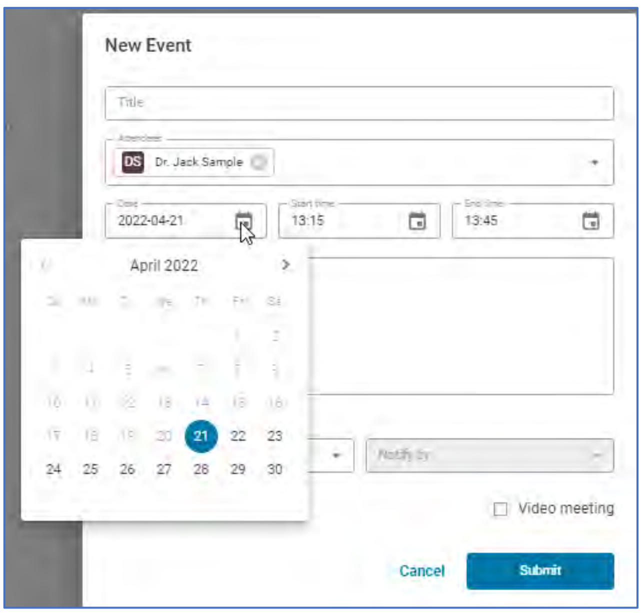
- The ***Attendees*** field will be pre-populated; you will be pre-selected as the only attendee.

  - *If you wish to invite other Group Members to the Event, you can use the drop-down arrow within this field. A drop-down list of your group contacts will be displayed for you to then select and add these invitees to the field.*



> NOTE:
>
> Since you are using the 'My Schedule' view, you will only be able to see your own personal calendar and availability.
>
> **If you need to invite other members, it is recommended you book the event using the 'My Group' view instead.** The combined calendar view would let you see calendars of all your invitees and ensue you are booking a timeslot when all invitees are mutually available.

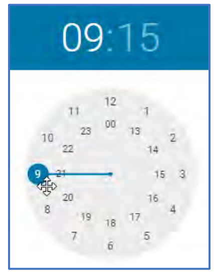
- Enter the ***Date*** for the Event.
  - If you click on the left portion of the field, the Date can be manually entered using YYYY-MM-DD format.
  - Alternatively, you can click on the calendar symbol within the field. A pop-up window with be presented for you to select the date using a calendar view. The current date will initially be selected; click to highlight a different date as needed.



- Enter the ***Start Time*** for the Event.
  - If you click on the left portion of the field, you can manually enter the time (in 00:00 format).

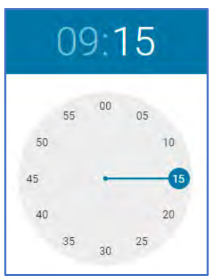
  - Alternatively, you can click on the calendar symbol within the field. A pop-up window with an hour clock will then be presented.

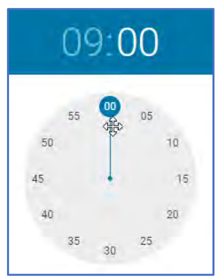
- *The current time will initially be shown with the current '**hour**' highlighted.*
- *Use your cursor to rotate the clock hand to the desired Start Time **hour**.*



(HINT: The outer clock ring indicates AM hours; the inner ring indicates PM hour. Be sure you are selecting the correct hour by positioning your cursor on the appropriate ring.)

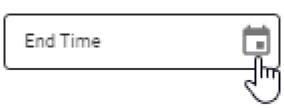
- *Once you select the Start Time **hour** and release your cursor, the pop-up window will then display and highlight the Start Time **minutes**.*
- *Use your cursor to rotate the clock hand to the desired Start Time **minutes**.*





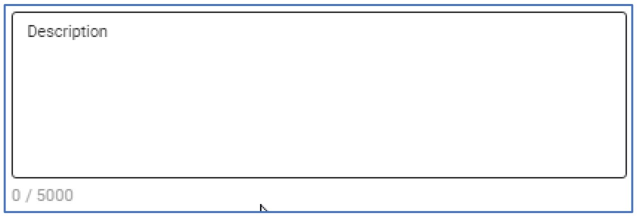
- *Once you select the Start Time **minutes** and release your cursor, the pop-up window will close. The Start Time that was selected using the pop-ups will now be populated in the **Start Time** field.*

- Enter the '**End Time'** for the Event:



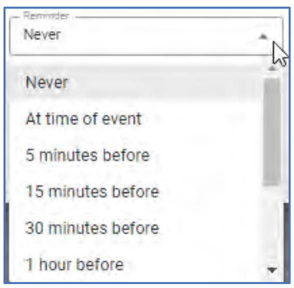
  - Perform the same steps you used for setting the Start Time.
    - *You can click on the left portion of the field and manually enter the time (in 00:00 format).*
    - *Alternatively, you can click on the calendar symbol within the field (and use the pop-up windows to select the End Time hour and End Time minutes by rotating the clock hands.)*

- Enter the '**Description'** for the Event in the textbox provided.:

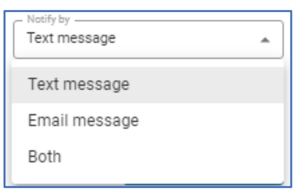


- Set a ***Reminder*** for the Event (if desired).

  - Select the *Reminder Timing* using the first drop-down box.



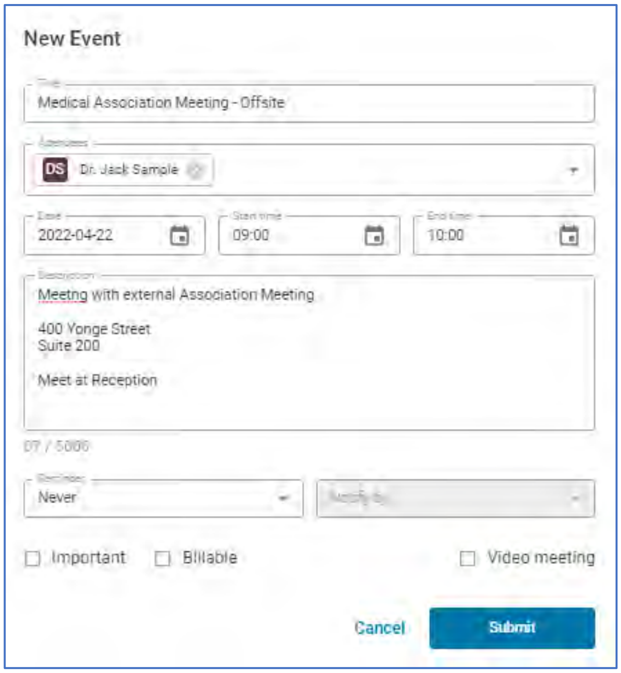
  - Select the *Reminder Message Type* using the second drop-down box.



- Flag the Message as ***Important***, ***Billable*** and/or as a ***Video meeting*** *(if desired)*.

  - Click the associated checkbox to set any of these flags.

- When all details of the Event are completed in the pop-up window, you will need to Save the event to your calendar.

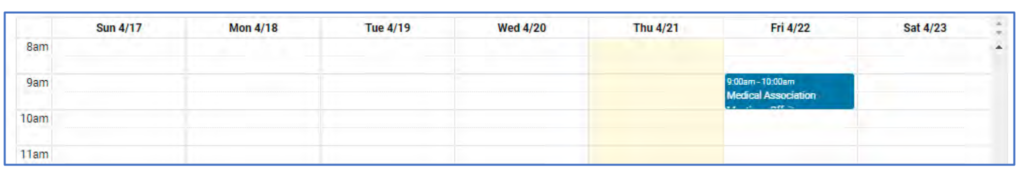


- Click the ***Submit button*** to save your Event.

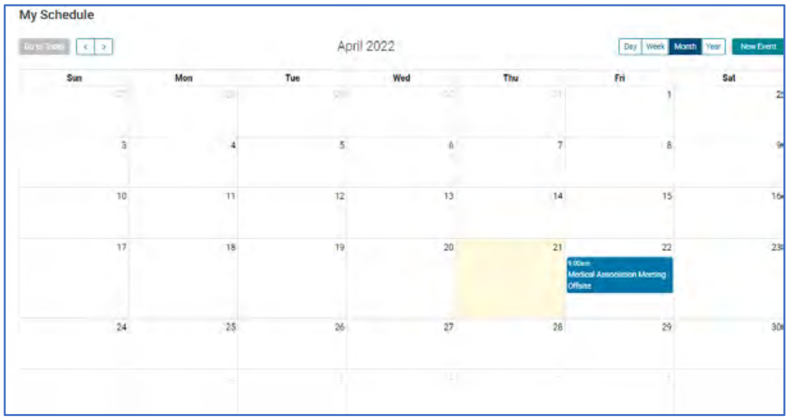
- The **'New Event' pop-up window will close**, returning you to the 'My Schedule' view on the Schedule tab screen.

▪ The Event will now be saved and will appear in your calendar grid in ***blue shading***.

Display of Event in 'My Schedule' timetable grid – Week format



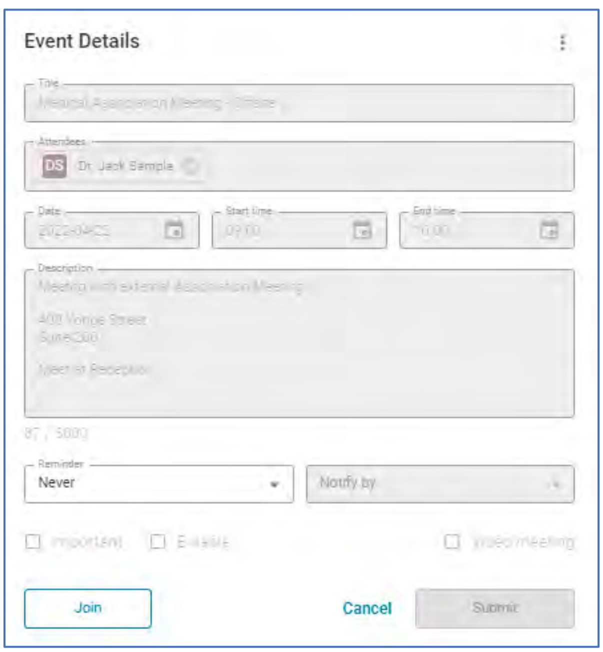
Display of Event in 'My Schedule' timetable grid – Month format



To **view the Event Detail** after it has been saved to your calendar:

- Click on the Event within your calendar grid.

- An ***Event Detail pop-up window*** will then be displayed.

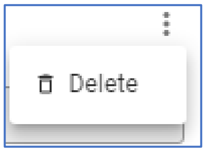


  - The Event detail will now be viewable. All detail will be 'view only' and protected from change.
  - After reviewing the Event Detail, click ***'Cancel'*** to close the pop-up.

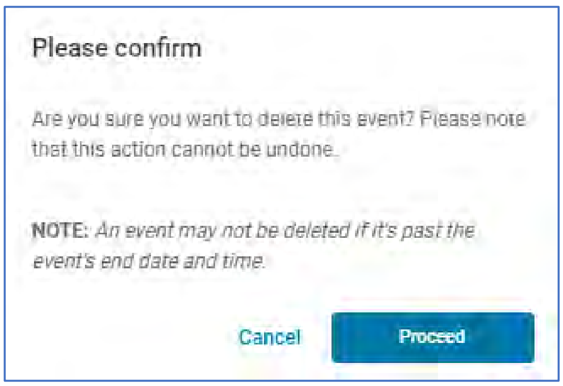
9.2.2 Cancel and Remove an Event

To **cancel an Event** in your calendar:

- Click on the Event within your calendar grid to open the ***Event Detail pop-up window***.
- On the top-right of the pop-up, click the menu button to access the ***Delete*** option.



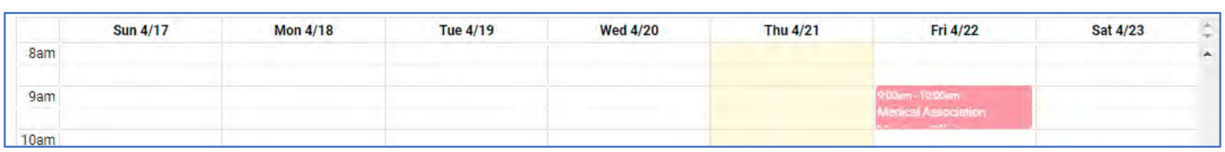
- Click the 'Delete' option. A pop-up window will be presented for you to confirm the action.



  - Click the ***Proceed*** button to cancel your Event.

  - The pop-up window will close, and your Event will be cancelled.

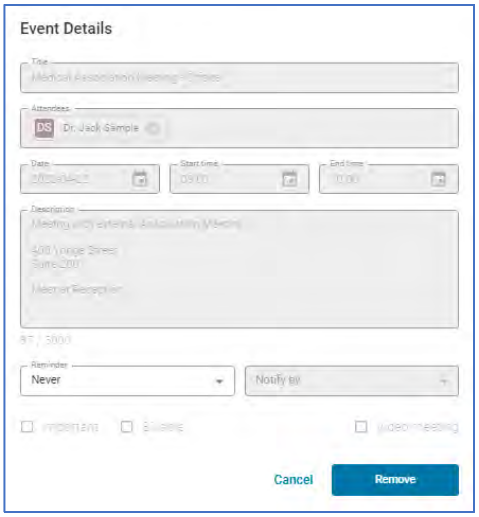
- When you return to your 'My Schedule' view, your Event will now appear in your calendar with ***red shading*** to indicate it has been cancelled.



If you wish to completely ***remove the cancelled*** Event from your calendar:

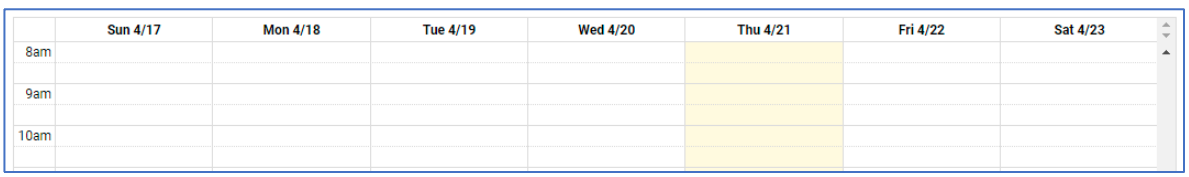
- Click on the cancelled Event within your calendar grid.

- An ***Event Detail pop-up window*** will then be displayed.



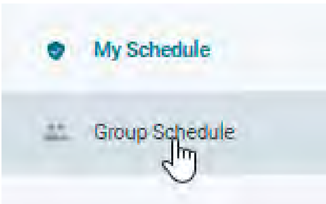
- Click on the ***Remove*** button.

- The ***Event Detail pop-up window*** will close, returning you to your '***My Schedule***' view. The cancelled Event will no longer appear in your calendar.



10 Using your ‘Group Schedule’ (Members Timetable)

You can use the ‘Group Schedule’ to book meetings or video visits with other members of your SigMail Group. With this view you will see a combined calendar of all members, enabling you to determine meeting timeslots when all invitees are *simultaneously* available.

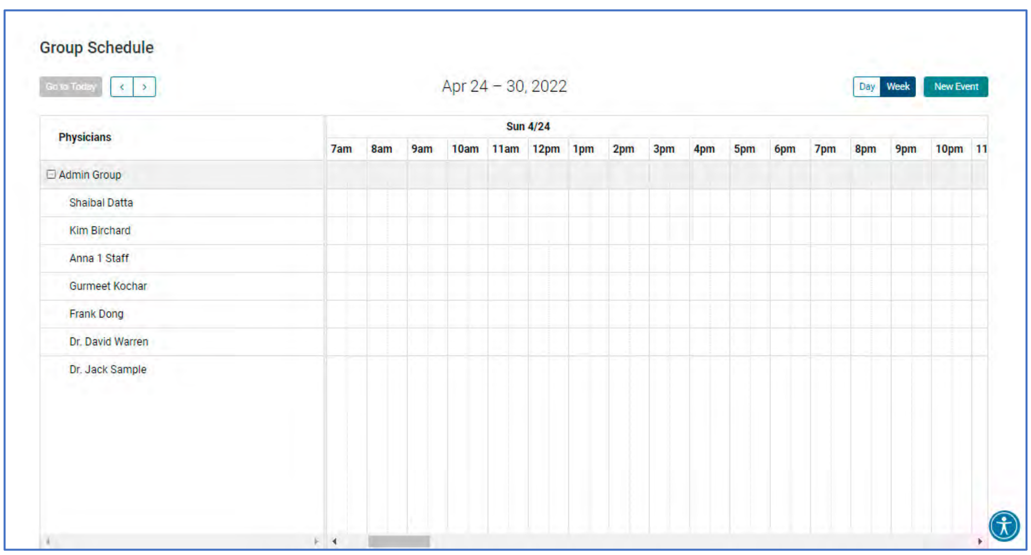


10.1 Navigating and Understanding ‘Group Schedule’

The left-hand side of the ‘***Schedule***’ tab page displays the timetable grid for the selected schedule view.

When you initially access the ***‘Group Schedule’ view*** on this page:

- The schedule grid will display info for the ***current workweek*** (as indicated with the date range labeled above the grid window). Workweek is based on a Sunday-to-Saturday definition.
- The display will be positioned on the morning of the ***first day*** of the workweek (Sunday).

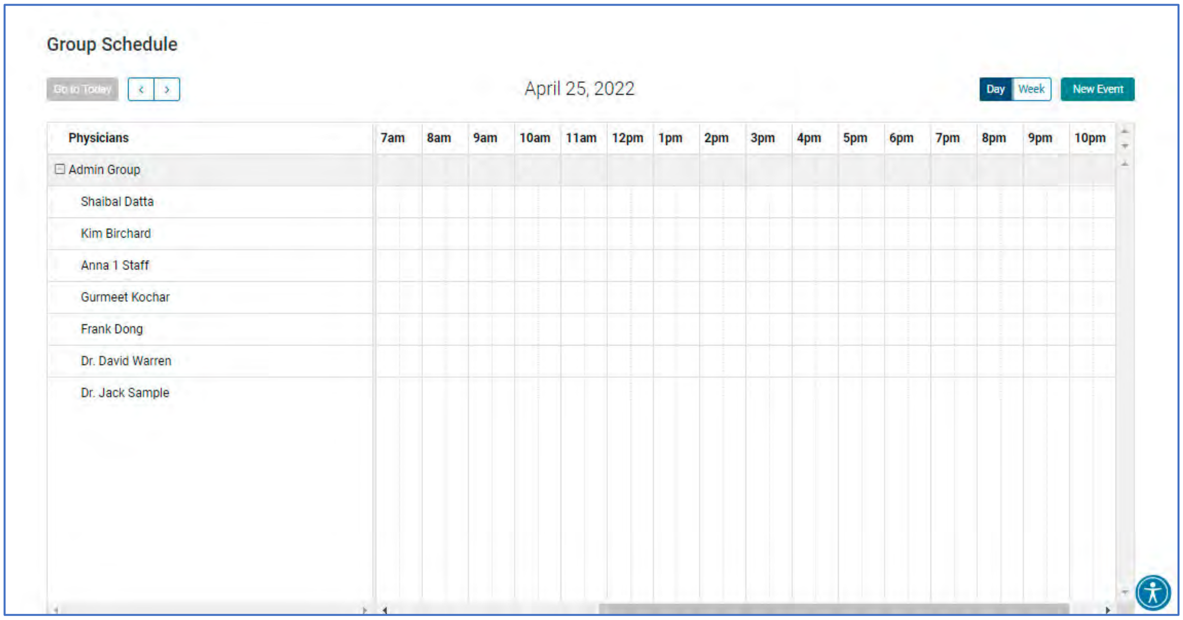


The ***Week*** timetable format is pre-selected and shown by default. However, a ***Day*** format is also available.

- To switch the timetable format between the different timetable views, click the desired ***format button*** (at the top-left above the timetable grid).

- The right-hand side of the window will then display the alternate format that was chosen.

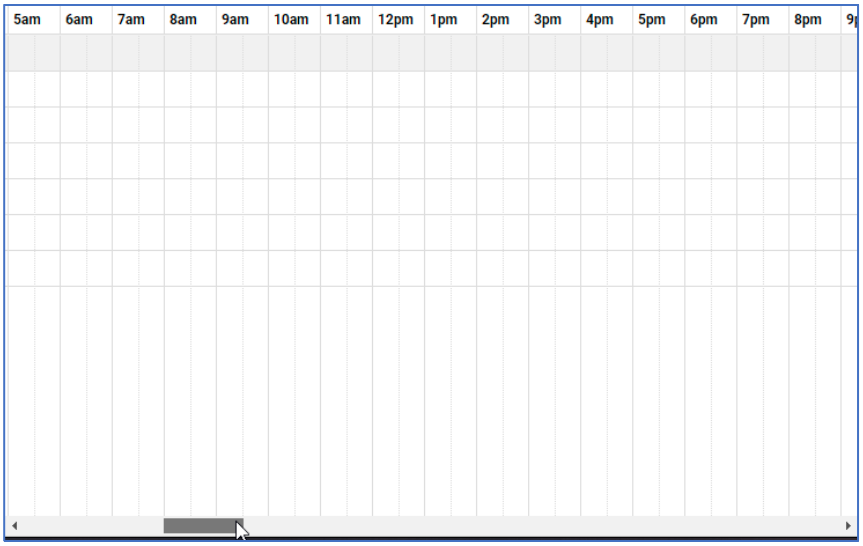
*Example: **Day** format of '**Group Schedule**' timetable grid*



The Group Schedule ***displays the calendars for every Member within your SigMail contact groups***. ***A separate row on the grid is listed for each member.***

The timetable grid is divided into columns representing each workday Hour.

- To ***advance or reverse horizontally*** (to see additional time columns), use the ***scrollbar*** at the bottom of the grid window.



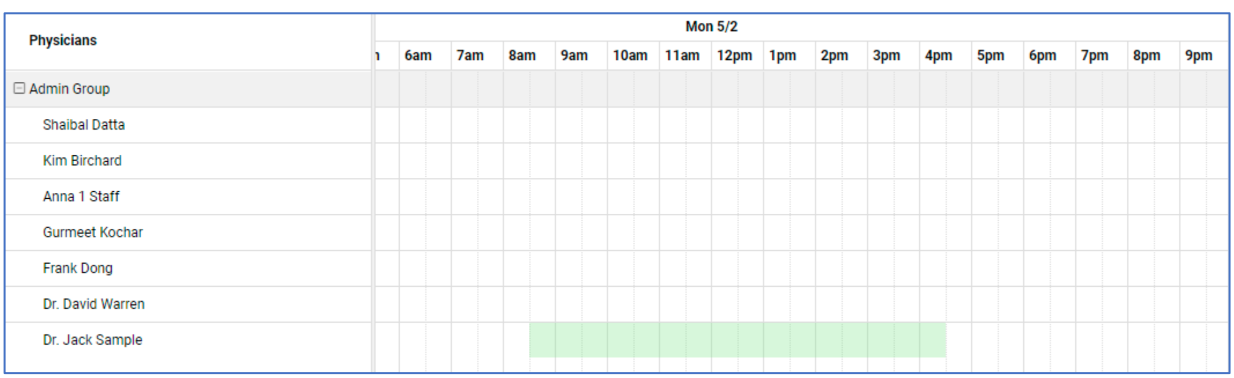
To view a ***different workweek*** *Week or Day* of the group calendar:

- use the ***arrow buttons*** (at the top-left above the timetable grid) to move forward or backward.

- You will then be moved forward (or backward) by one Week or Day (depending on the timetable format chosen).

Shading within the Timetable allows you to determine the availability of *other Members* within your Contact Group:

- If you have already populated your ***Work Schedule*** for this workweek, your work hours will be displayed as **green shaded timeslots** on your row within the grid.



(Refer to the chapter entitled "Adding your 'Work Schedule' to SigMail Calendars" in this guide.)

- Similarly, if you already have **existing Events** booked into your Schedule for the day you are viewing, these work hours will be represented by **blue-shaded timeslots** on your row within the grid.

10.2 Scheduling Events using 'Group Schedule'

Scheduling events using your 'Group Schedule' would normally be done ***when you wish to book a Meeting or Video Visit with another SigMail member and require a combined view of calendars*** to determine mutually available timeslots for all invitees.

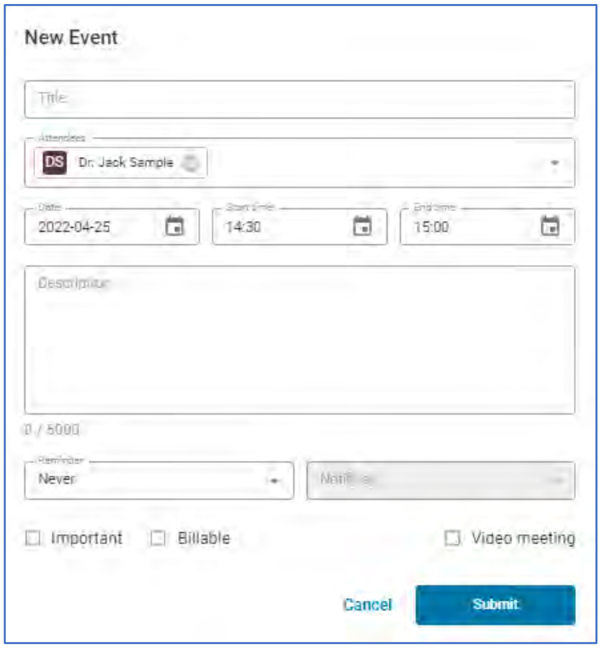
10.2.1 Requesting a Meeting or Video Visit (Organizer)

To invite other members within your SigMail Contact Group to a joint Event:

- First, ***determine the appropriate timeslot*** for your Event using the Group Schedule view.
  - *Be sure to advance the timetable grid horizontally to view the appropriate date & time.*
  - *For each contact you want to invite, review their individual row within the grid.*
  - *Ensure all invitees are available for the desired timeslot (based on shading of their work hours).*

- Create a ***New Event*** to book your event in the desired timeslot and send invitations to the participants. Click the **'New Event' button** located above the timetable grid.

- A **'New Event' pop-up window** will be presented for you to enter the details of the Event.

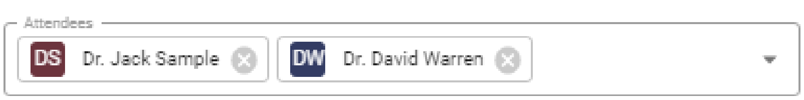


- Enter a ***Title*** to describe the event. The title should be concise but meaningful, as it will be used to label the meeting timeslot when it appears on calendar grid view of all invitees.

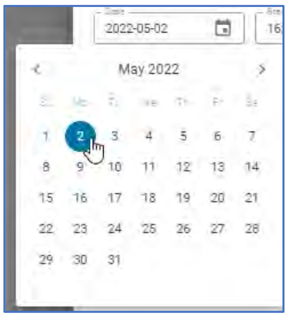
- Invite other Group Members as ***Attendees*** for the Event,
  - *The Attendees field will be pre-populated; you will be pre-selected as the first attendee.*

  - *Use the drop-down arrow within this field. A drop-down list of your group contacts will be displayed for you to then select and add additional invitees to the event.*

  - *Once selected, the member will be added to the list of Attendees for the Event.*



- Enter the ***Date*** for the Event.
  - If you click on the left portion of the field, the Date can be manually entered using YYYY-MM-DD format.
  - Alternatively, you can click on the calendar symbol within the field. A pop-up window with be presented for you to select the date using a calendar view. The current date will initially be selected; click to highlight a different date as needed.

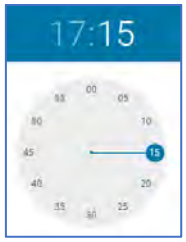


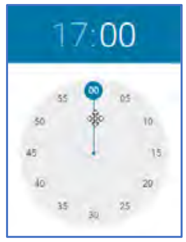
- Enter the ***Start Time*** for the Event.
  - Click on the left portion of the field to manually enter the time (in 00:00 format).

  - Alternatively, you can click on the calendar symbol within the field. A pop-up window with an hour clock will then be presented.
    - *The current time will initially be shown with the current '**hour**' highlighted.*
    - *Use your cursor to rotate the clock hand to the desired Start Time **hour**.*

> HINT: The outer clock ring indicates AM hours; the inner ring indicates PM hour. Be sure you are selecting the correct hour by positioning your cursor on the appropriate ring.

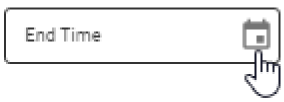
- *Once you select the Start Time **hour** and release your cursor, the pop-up window will then display and highlight the Start Time **minutes**.*
- *Use your cursor to rotate the clock hand to the desired Start Time **minutes**.*





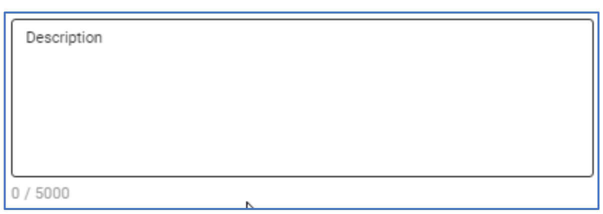
- *Once you select the Start Time **minutes** and release your cursor, the pop-up window will close. The Start Time that was selected using the pop-ups will now be populated in the **Start Time** field.*

- Enter the '**End Time'** for the Event:

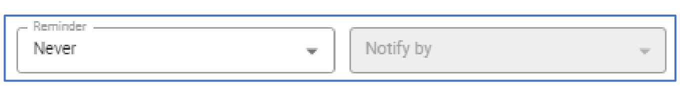


  - Perform the same steps you used for setting the Start Time.
    - *You can click on the left portion of the field and manually enter the time (in 00:00 format).*
    - *Alternatively, you can click on the calendar symbol within the field (and use the pop-up windows to select the End Time hour and End Time minutes by rotating the clock hands.)*

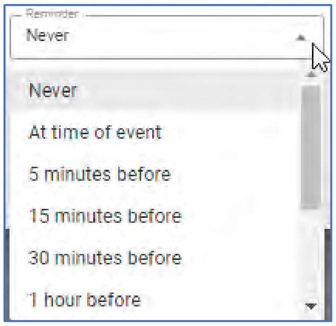
- Enter the '**Description'** for the Event in the textbox provided.:



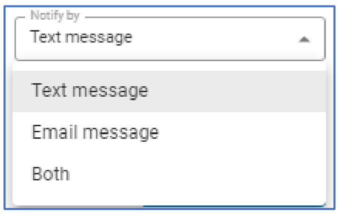
- Set a ***Reminder*** for the Event (if desired).



  - Select the *Reminder Timing* using the first drop-down box.



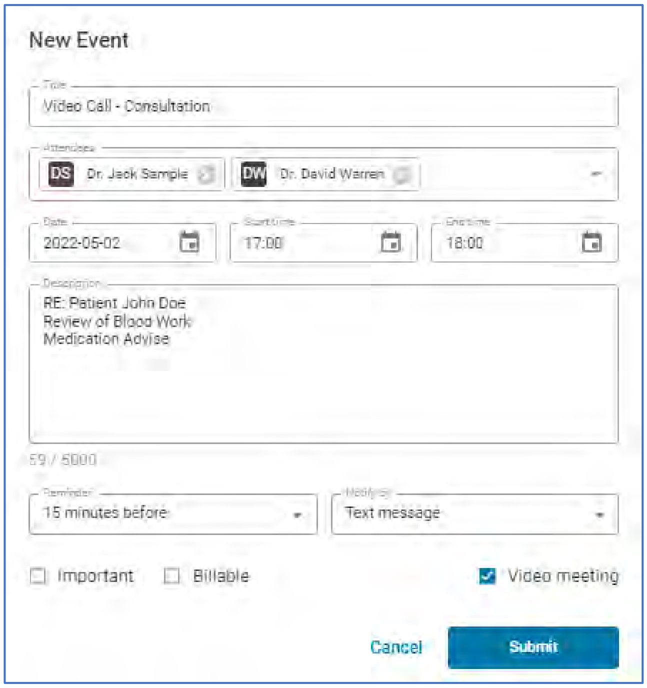
- Select the *Reminder Message Type* using the second drop-down box.



- Flag the Message as ***Important***, ***Billable*** and/or as a ***Video meeting*** *(if desired)*.

  - Click the associated checkbox to set any of these flags.

- When all details of the Event are completed in the pop-up window, you will need to Save the event to your calendar.

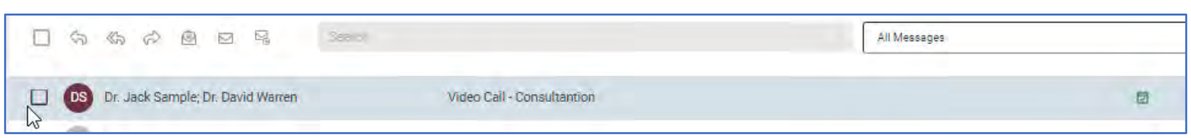


- Click the ***Submit button*** to save your Event.

- The **‘New Event’ pop-up window will close**, returning you to the ‘Group Schedule’ view on the Schedule tab screen.

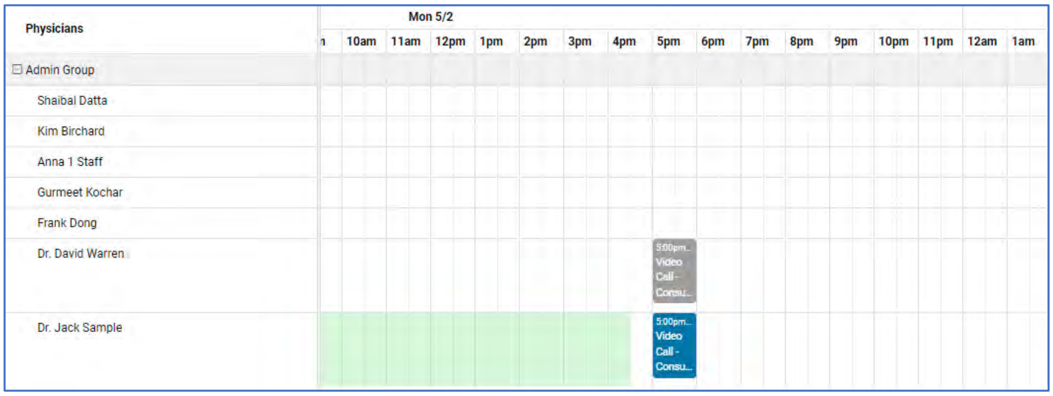
▪ The Event Invitation is now saved.

  - Invitation messages will be automatically generated and sent to the Inbox of each invitee.
  - As the Organizer of the Event, a copy of this invitation will appear in the Sent folder of your own Mailbox.



▪ The event will now appear in the calendar grid.

Display of Event in 'Group Schedule' timetable grid – After Send



- For the Organizer (Requestor) of the Event, the event will appear on their timesheet row in **blue shading**. This indicates an '***Accepted***' meeting. (As the organizer of the event, their meeting is automatically assumed to be Accepted in their own calendar.)
- In contrast, the event will initially appear on the timesheet rows of the Invitee(s) in ***grey shading***. This indicates a '***Pending***' invitation since the invitee has not yet responded (Accepted or Declined) the invitation.

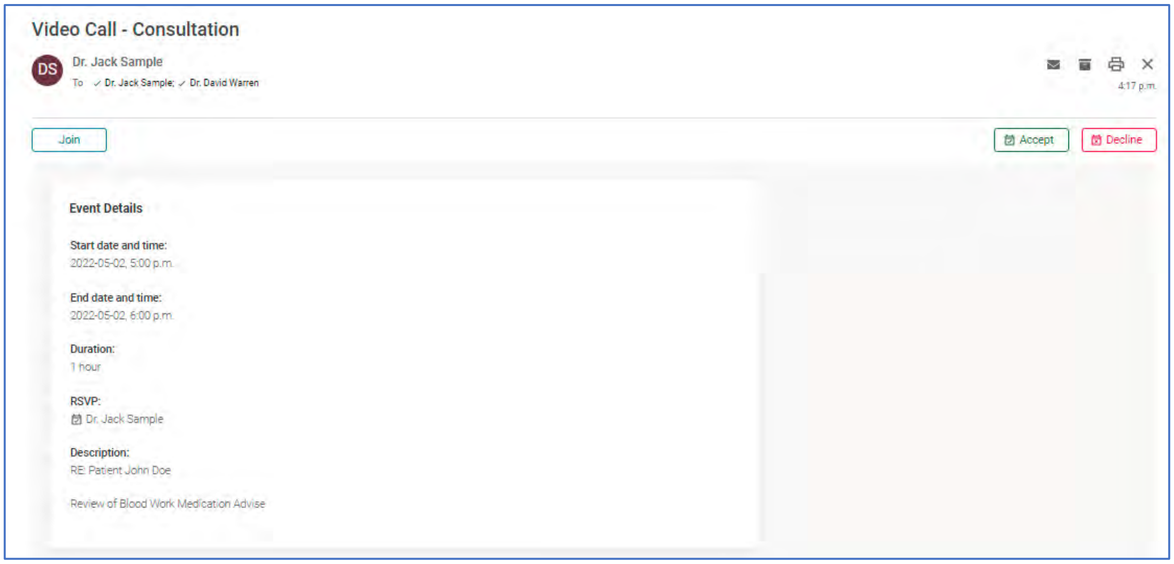
10.2.2 Receiving a Meeting or Video Visit Invitation (Invitee)

As mentioned, when a Group Member has been invited to an Event:

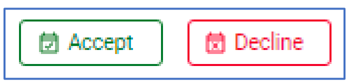
- The **invitee(s) will be notified by way of an Event Invitation message** being sent to their SigMail Inbox.
  - On the List View, this message row includes an Invitation Status indicator.

  - This indicator will initially be a ***grey checkbox symbol***, indicating it is a ***Pending*** invitation.

- The body of the message provides the full Event Details.

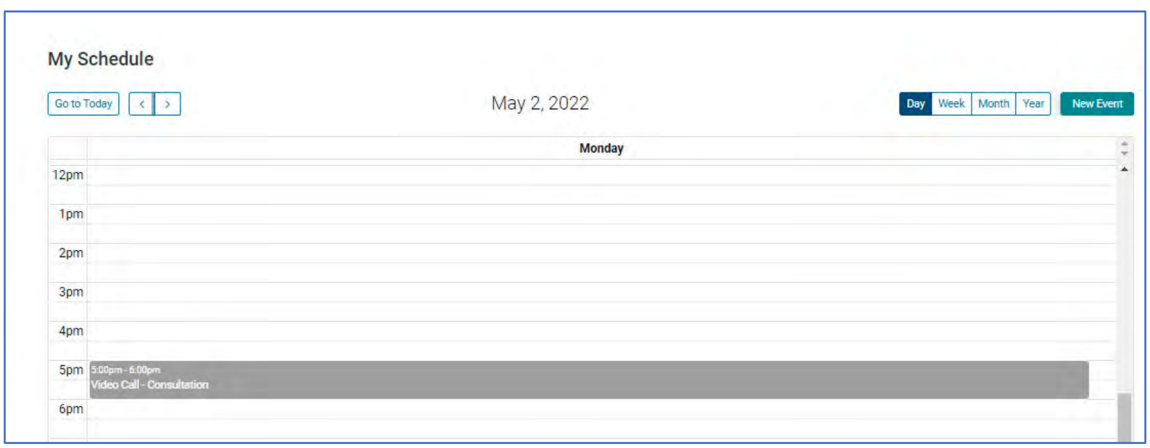


- Buttons are provided for the invitee to either 'Accept' or 'Decline' the invitation.

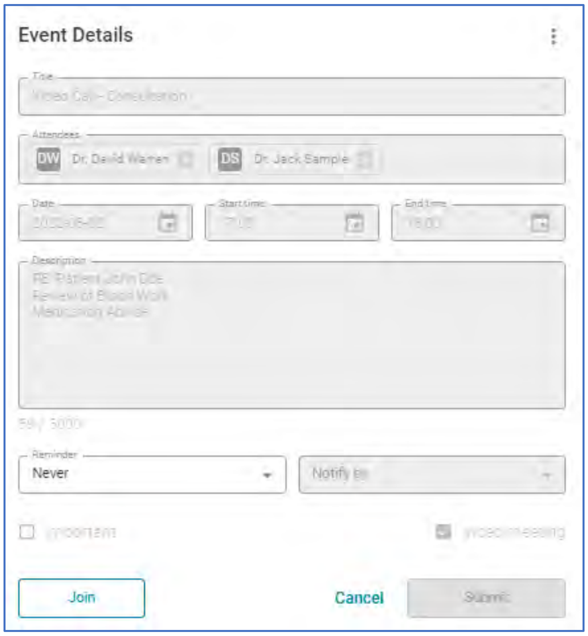


The Event will also appear in their Schedule time grid.

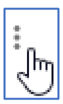
- The timeslot will initially appear as ***grey-shaded***, to indicate it is a ***Pending invitation*** still awaiting a response.



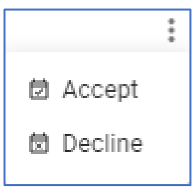
- The Invitee can click on the Meeting timeslot to open the **Event Details**.
  - A pop-up *Event Details window* will be presented showing the event. The fields on the screen are view-only and protected.



- The Event Details include a menu in the top-right corner of the pop-up.



- The menu provides the same capabilities to 'Accept' or 'Decline' the Event Invitation.



10.2.3 Accepting a Meeting or Video Visit Invitation (Invitee)

To **Accept** a *Pending* Event Invitation:

- Open the **Event Invitation message** that was received in your SigMail Inbox.

- Click the '**Accept**' button within the Content View of the message.

- The message will close, returning you to the List View of your Inbox.

- Alternatively, click on the meeting timeslot within your Schedule to open the Event Details pop-up window. Use the menu in the top-right corner and select 'Accept'.
- Open the **Event Invitation message** that was received in your SigMail Inbox.

Once the Invitation is '**Accepted**':

- The Message row for the Event Invitation within the invitee's Inbox will have an updated Invitation Status indicator.

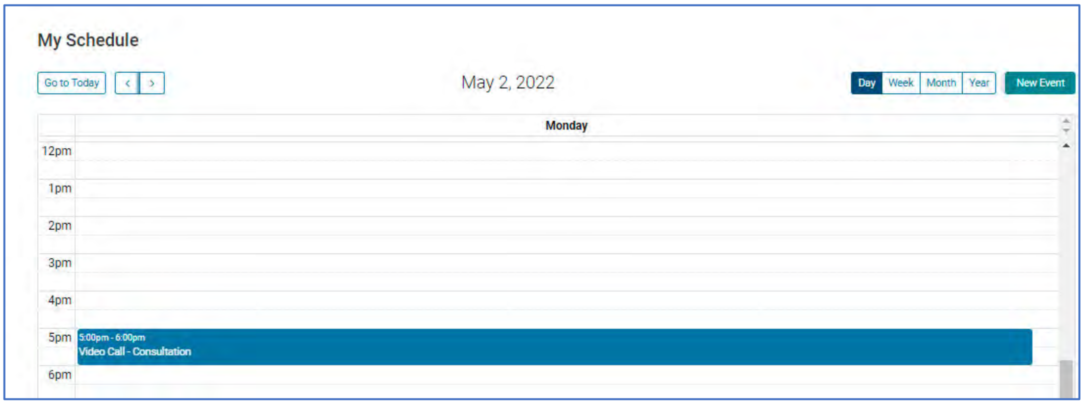
  - Status indicator will have changed from the *grey checkbox symbol* to the ***green checkbox symbol***.

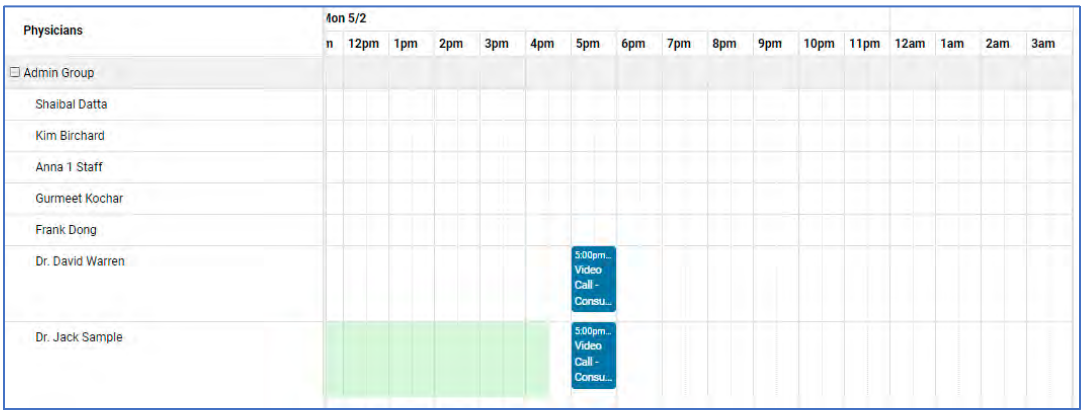
- The Event will also have an updated appearance within the **Schedule** time grid.

  - The timeslot will change from being grey-shaded to ***blue-shaded to indicate it is an Accepted event*** for this invitee.

Display of Event in Invitee's 'My Schedule' timetable grid – After Accept



Display of Event in 'Group Schedule' timetable grid – After Accept

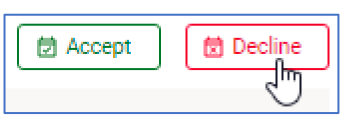


10.2.4 Declining a Meeting or Video Visit Invitation (Invitee)

To **Decline** a *Pending* Event Invitation:

- Open the **Event Invitation message** that was received in your SigMail Inbox.

  - Click the '**Decline**' button within the Content View of the message.



  - The message will close, returning you to the List View of your Inbox.

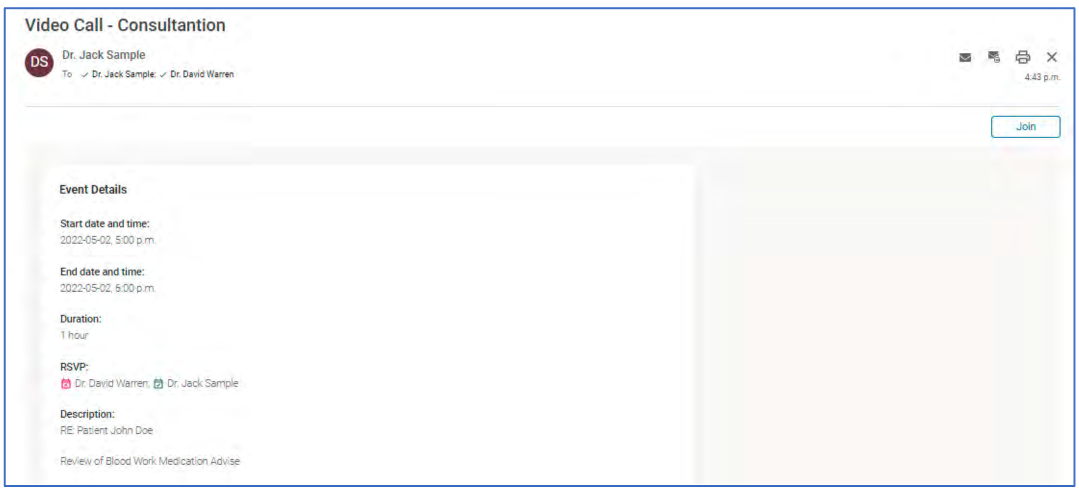
- Alternatively, click on the meeting timeslot within your Schedule to open the Event Details pop-up window. Use the menu in the top-right corner and select 'Decline'.

Once the Invitation is '**Declined**':

- For the Invitee, the Message row for this Event Invitation within their Inbox will have an updated Invitation Status indicator.

  - Status indicator will have changed from the *grey checkbox symbol* to the ***red-shaded checkbox symbol***.

- For the Event Organizer, they can refer to the Event Invitation message stored in their Sent mailbox.



  - Within the Content View of the message, the RSVP section will now reflect the red-shaded status symbol for this invitee.

- The Event will also have an updated appearance within the **Schedule** time grid.
  - The timeslot will change from being grey-shaded to ***red-shaded*** to indicate it is a *Declined* event for this invitee.

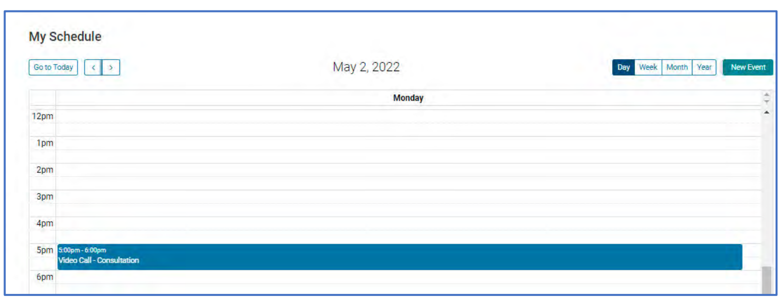
10.2.5 Cancelling or Recalling a Meeting or Video Visit (Organizer)

After sending out an Event Invitation, the Event Organizer may subsequently need to cancel the event (and then possibly reschedule it as a New Event in a different timeslot.). **Only the Event Organizer that originally issued the event invitation will have the ability to Cancel their Event.** *(In contrast, Invitees cannot Cancel the entire Event; they can only Decline their own invitation to the Event.)*

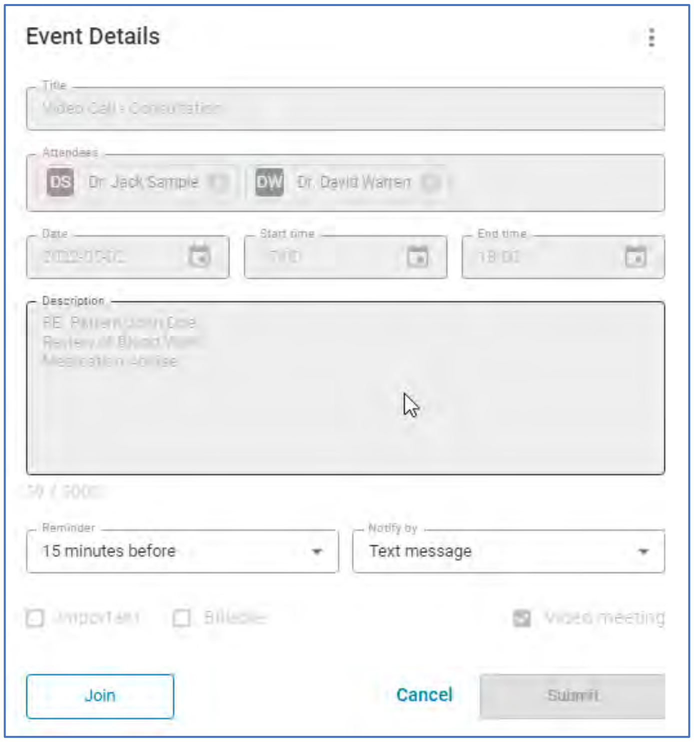
There are technically two methods available for an Event Organizer to cancel their Event: ***Cancel by Delete*** or ***Recall Invitation****.*

To use the **Cancel by Delete** method:

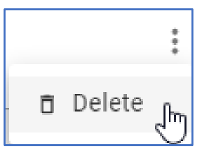
- The Event Organizer will access their *Schedule tab page* and click on the Event timeslot within their calendar grid (using either their 'My Schedule' or 'Group Schedule' views.)



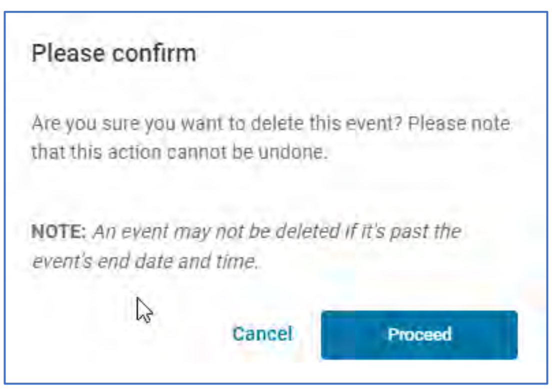
- An ***Event Details pop-up window*** will be presented showing the event. The fields on the screen are view-only and protected.



- On the top-right of the pop-up, click the menu icon to access the ***Delete*** option.



- Click the ***'Delete'*** option. A pop-up window will be presented for you to confirm the action.



  - Click the ***Proceed*** button to cancel your Event.

  - The pop-up window will close, and your Event will be cancelled.

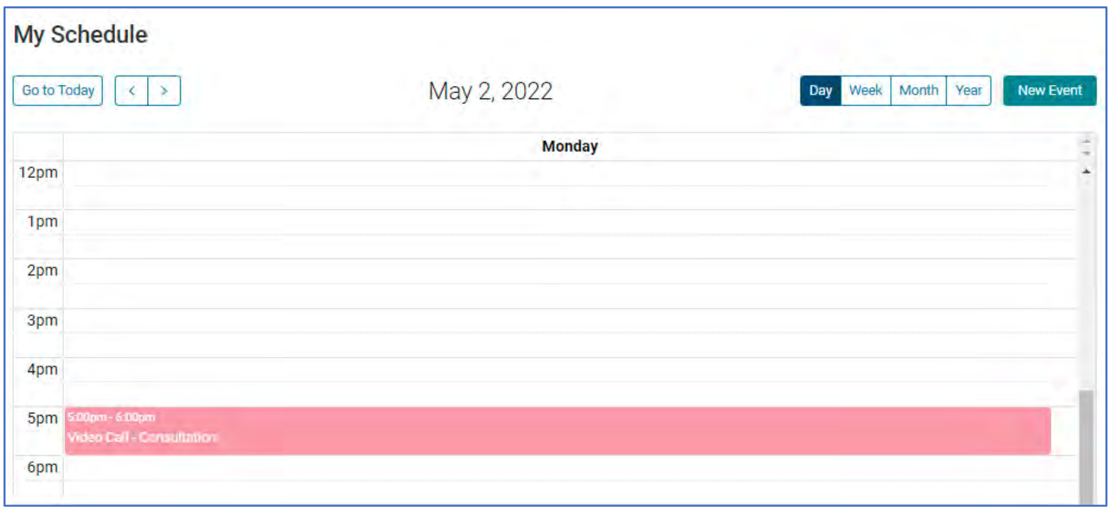
Once the Event is **Cancelled**:

- For the Invitee, the Message row for this Event Invitation within their Inbox will now be protected. The Subject column will now be prefixed as ‘[Cancelled]’.

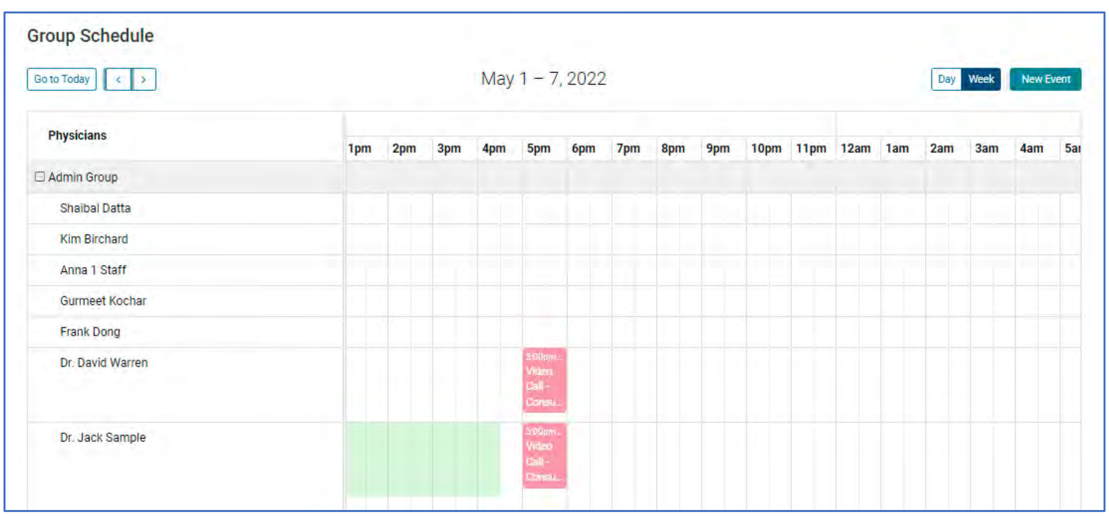
- Similarly for the Event Organizer, the Event Invitation message stored in their Sent mailbox will also now be protected and reflect ‘[Cancelled]’ in the Subject column.

- The Event will also have an updated appearance within the **Schedule** time grid.
  - The timeslot will change to ***red-shaded*** in the calendar grids ***for all attendees*** (organizer and all Invitees).

Display of Event in ‘My Schedule’ timetable grid – After Cancellation

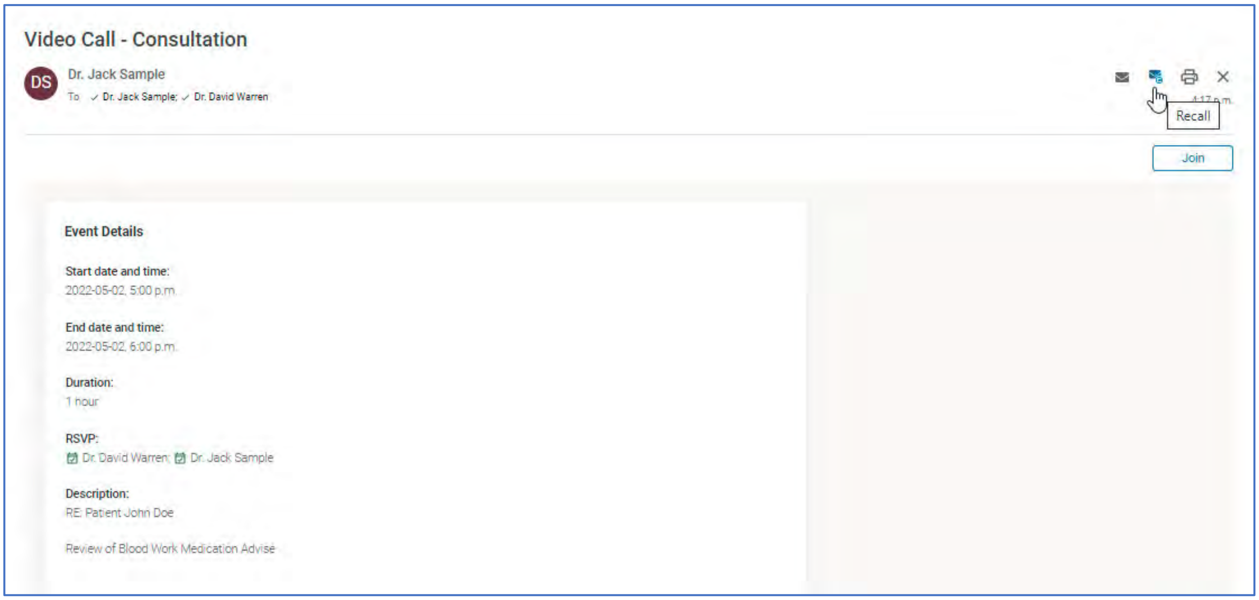


Display of Event in ‘Group Schedule’ timetable grid – After Cancellation



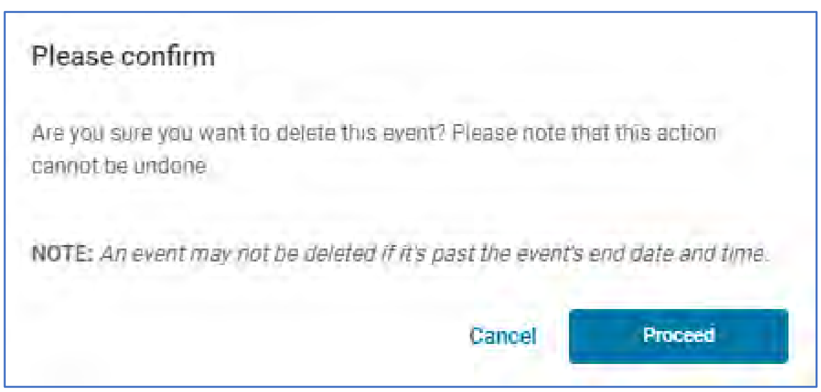
<u>To use the **Recall Invitation** method:</u>

- The Event Organizer will open the Event Invitation message originally issued and stored in their Sent mailbox.



- As the Event Organizer, the toolbar in the top-right corner will have a 'Recall' function available. Click the ***'Recall'*** option.

- A pop-up window will be presented for you to confirm the action.



  - Click the ***Proceed*** button to cancel your Event.

  - The pop-up window will close, and your Event will be cancelled.

NOTE:

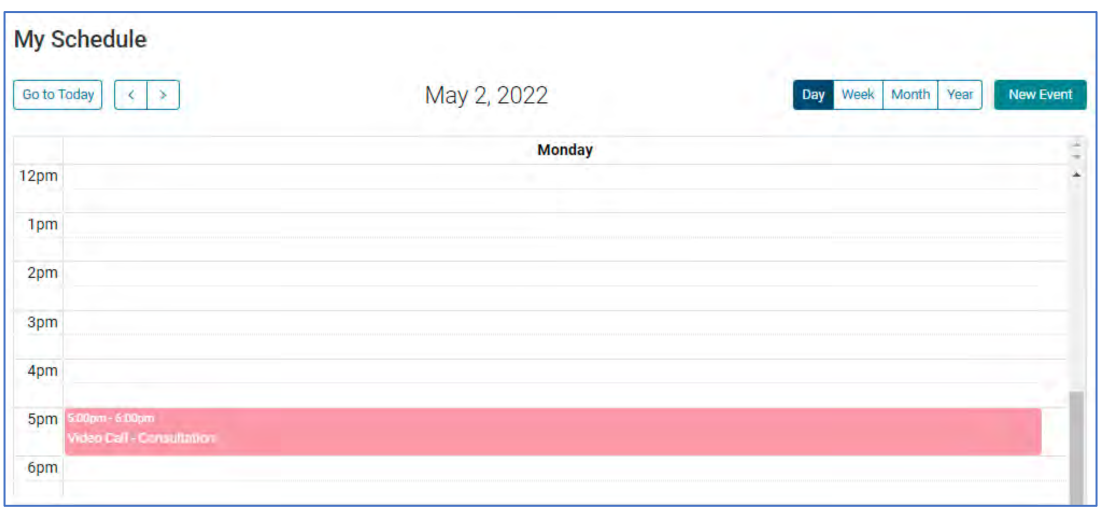
Using the ***Recall Invitation*** method will have the same effects as the ***Cancel by Delete*** method:

- For the Invitee, the Message row for this Event Invitation within their Inbox will now be protected. The Subject column will now be prefixed as '[Cancelled]'.
- Similarly for the Event Organizer, the Event Invitation message stored in their Sent mailbox will also now be protected and reflect '[Cancelled]' in the Subject column.
- The timeslot will change to red-shaded in the calendar grids for all attendees (organizer and all Invitees).

However, like recalling any message, the capability to Recall an Event Invitation is only available up to 7 days after its Sent Date.

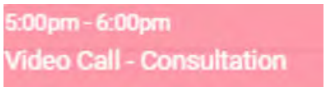
10.2.6 Removing a Cancelled or Declined Event from your Calendar

Regardless of whether you have Declined an Event Invitation (as an Invitee) or the Event was subsequently Cancelled (by the Organizer), the timeslot will still be marked in your calendar grid.
When you return to your 'My Schedule' view, your Event will still appear in your calendar with ***red shading*** to indicate it has been cancelled.

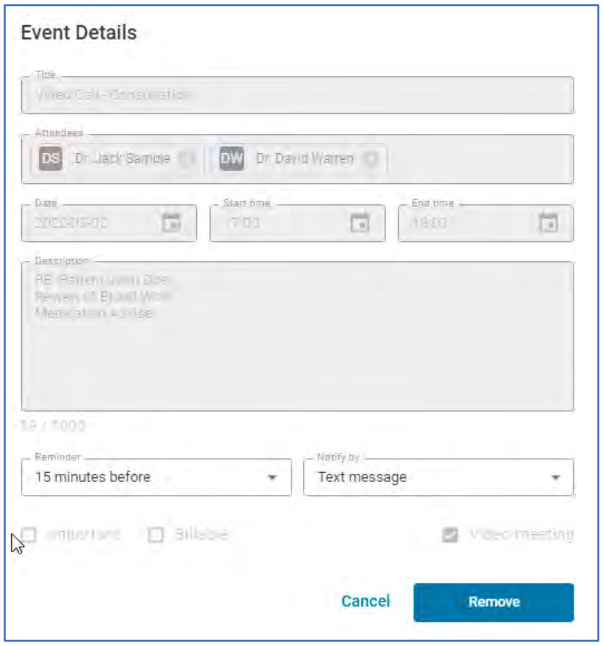


If you wish to completely ***remove the cancelled/declined*** Event from your calendar:

- Click on the cancelled Event within your calendar grid.

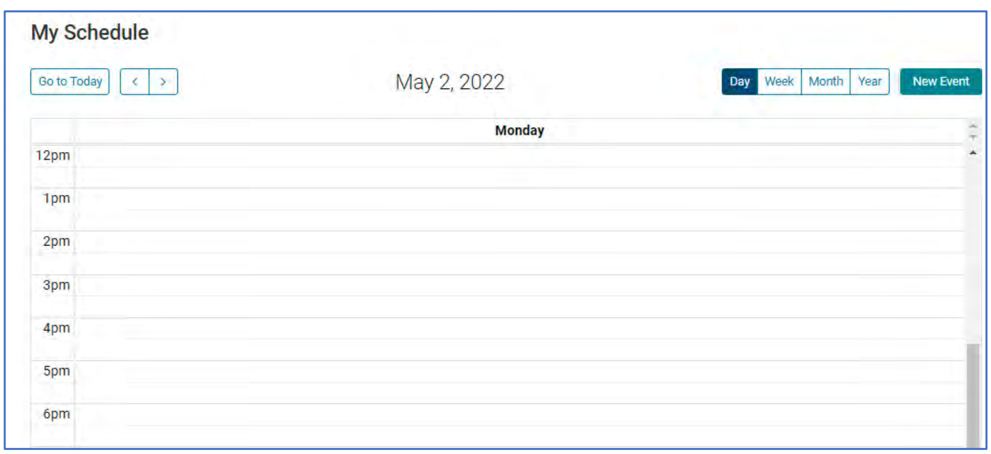


- An ***Event Detail pop-up window*** will then be displayed.



- Click on the ***Remove*** button.

- The ***Event Detail pop-up window*** will close, returning you to your '***My Schedule***' view. The cancelled Event will no longer appear in your calendar.



10.2.7 Attending a Scheduled Video Visit

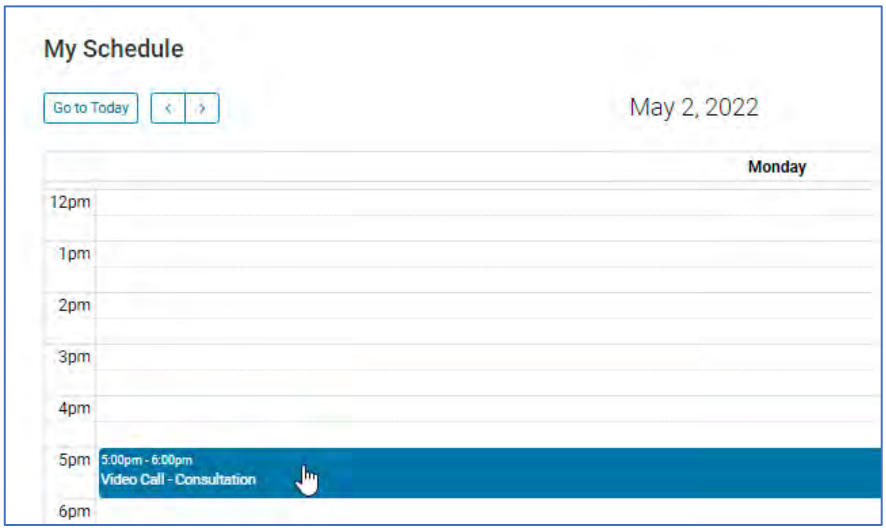
After receiving and accepting an Event Invitation for a Video Visit call, you will need to join the call ***at the scheduled date and time*.**

To Join a scheduled Video Visit from your Schedule tab:

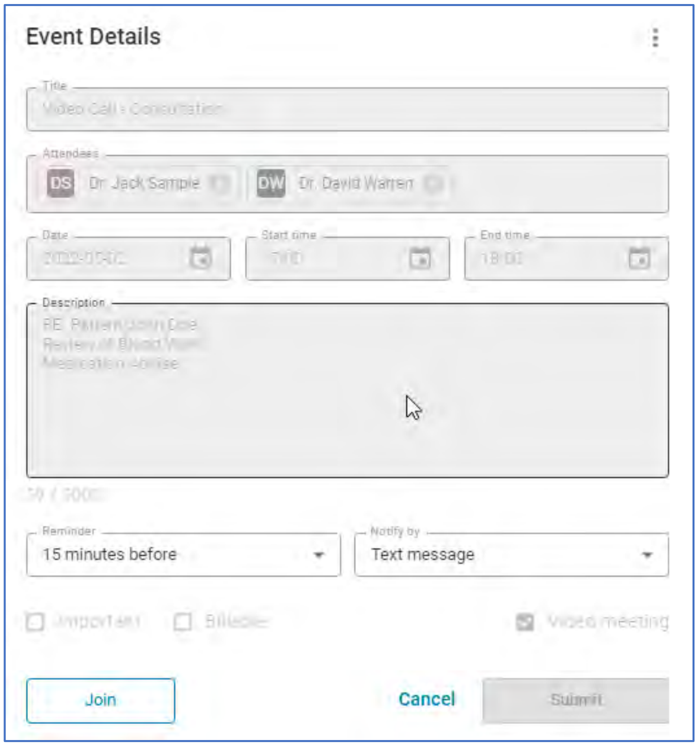
- On your 'My Schedule' view, the Event timeslot should appear in your calendar grid with ***blue shading*** indicating you accepted the invitation and are expected to attend.

  This appearance also indicates the call is still scheduled and active. (In contrast, if the call had subsequently been cancelled by the Event Organizer, the timeslot marker would instead be displayed in red shading.)

- Click on the Event timeslot marker within your calendar grid.



- An ***Event Detail pop-up window*** will then be displayed.



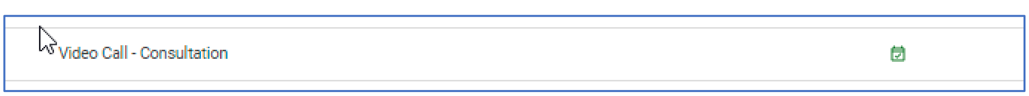
- Click the '***Join***' button located at the bottom of the *Event Detail pop-up window*.

- A pop-up window linking you to the interactive web call will then be displayed for you to join the other attendees on the call.

<u>To Join a scheduled Video Visit from the Event Invitation message:</u>

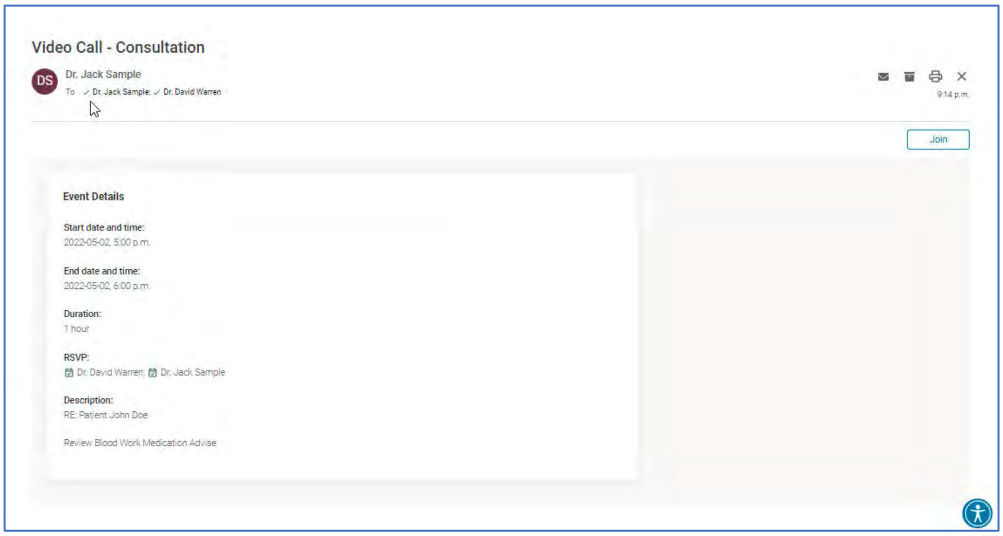
- Alternatively, you can join the Video Visit using the original Event Invitation message you received from the Event Organizer.
- Locate the Invitation message in your Inbox folder.

- The message row should show the 'Accepted' Invitation Status indicator (green checkbox symbol). *This indicates that you had accepted the call and are expected to attend.*



- This appearance of the message row also indicates that the Event is still scheduled and active. *(In contrast, it the Event Organizer had subsequently cancelled the event, the message row would not have the checkbox symbol. Instead, the message row would be in grey text and protected from being opened. The text '[Cancelled]'would appear in the Description column.)*

- Open the message. Within the Content View of the message, there is a 'Join' button in the top-right corner (above the Event Detail).

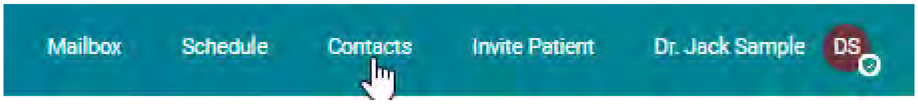


- Click the '***Join***' button.

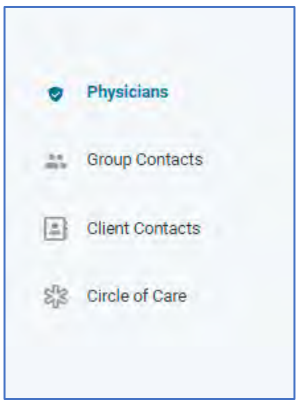
- A pop-up window linking you to the interactive web call will then be displayed for you to join the other attendees on the call. Remember that you cannot join a call until the arranged time.

11 Using your 'Contacts' Directory

You can access your **'Contacts' tab page** using the toolbar at the top of the SigMail window.



The '**Contacts' tab page** has a **Menu List** on the left-hand side of the page to access your different Contact directories:



- This Menu List allows you to switch between:
  - a '***Physician***' Directory
  - a '***Group Contacts'*** Directory
  - a '***Client Contacts***' Directory
  - a '***Circle of Care***' Directory

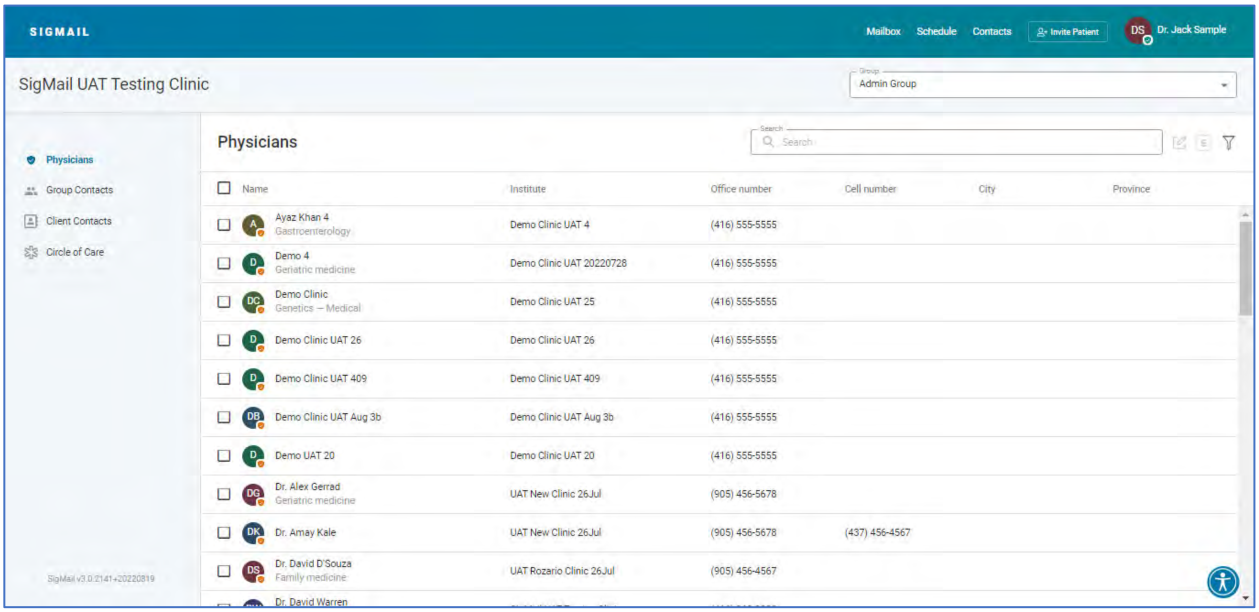
- When you initially land on this page, your '*Physicians*' Directory will be pre-selected and open for view in the right-hand side
- *To switch the view to a different Directory, click on the desired Directory folder label within the left-hand Menu List.* The Contact tab window will then retrieve and display details for that selected Directory.

11.1 Using your 'Physicians' Contact Directory

The '***Physicians***' Contact Directory provides you ***the listing of all Physicians enrolled in the SigMail system*** so you can easily view their Contact Details and send secure SigMail Messages to them.

11.1.1 Searching and Filtering the 'Physicians' Contact List

When viewing the *Physicians* directory:

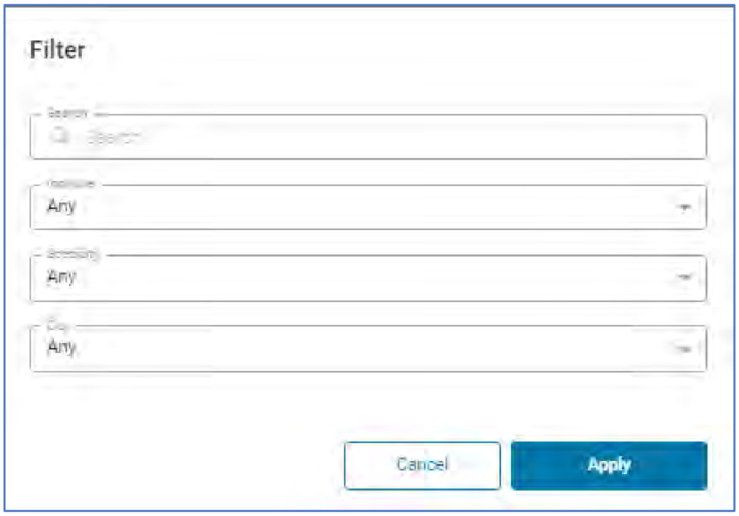


- At the top of the window, you are provided with a '***Search***' box that allows you to search and filter the *Physicians* list based on specific text:

  - Start entering text within the 'Search' text box.
  - As you type each character, the list will immediately be filtered to only include those Physicians that contain that matching character string. ***Matching is performed using the 'Name', 'Institute' and 'Office number' column values.*** If the entered 'Search' character string matches the characters found in *any* of these three columns, only those Physician rows will remain on the filtered list.

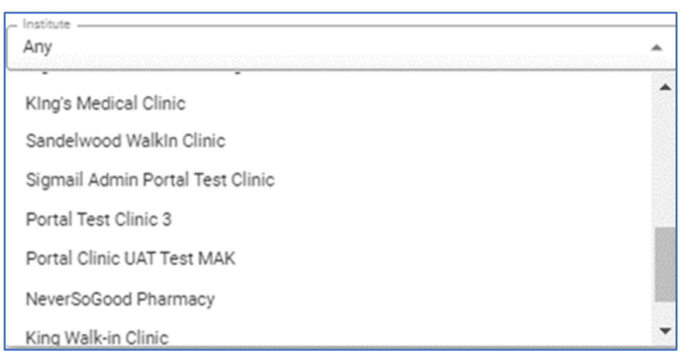
- Additional filtering capabilities are available using a ***Filter pop-up screen***.
  - Click the *Filter* icon located above the listing (to the left of the *Search* field).

  - A *Filter pop-up window* will be displayed.

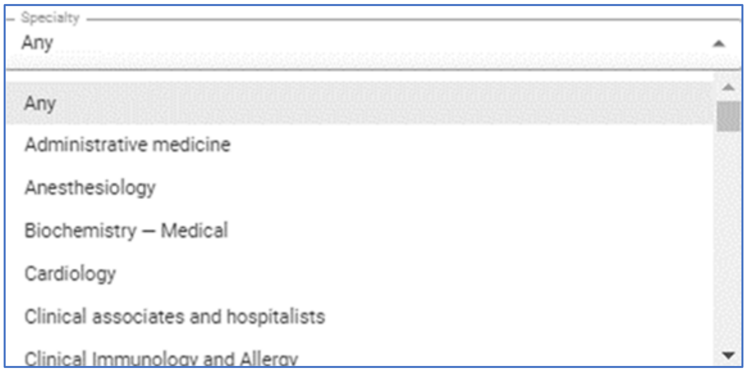


- The ***'Search'** box* allows you to search and filter the Physicians list based on specific text:
    - Enter text within the 'Search' text box to include only those Physicians that contain the matching character string. Matching is performed using the 'Name', 'Institute' and 'Office number' column values.

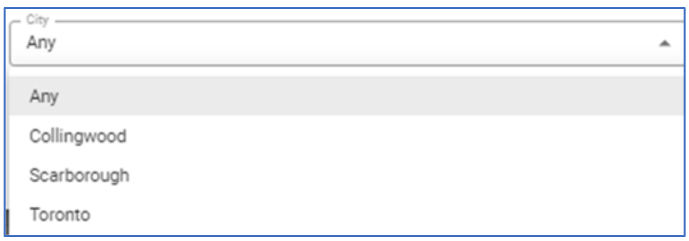
      (NOTE: This is the same 'Search' filter text box capability that appears on the main Physicians directory screen. If you had already entered a 'Search' value on the main screen before opening the pop-up, the entered value will be displayed (and editable) on this pop-up.)
- The **'*Institute*'** box allows you to filter the Physicians list based on a selected Institute:
    - Click on the field to open the drop-down list. Select a specific Institute using the list (if applicable).



- The ***'Specialty'*** box allows you to filter the Physicians list based on a selected Specialty:
    - Click on the field to open the drop-down list. Select a specific Specialty using the list (if applicable)

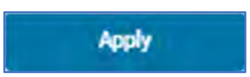


- The ‘***City***’ box allows you to filter the Physicians list based on a selected City location:
  - Click on the field to open the drop-down list. The list will display all City locations of the Physicians on your SigMail list.



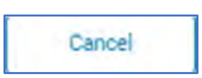
  - Select a specific City from the drop-down (if applicable)

- Once you have completed your entries/selections within the *Filter pop-up*, click the ***Apply*** button.



  - **The *Filter pop-up* screen will close, returning you to the main *Physicians* contact screen. The Physicians list will now be filtered to include only those Physicians that match the criteria you entered on the pop-up.**

- Alternatively, if you wish to return to the main Physicians contact screen *without using the Filter pop-up criteria*, click the *Cancel* button.

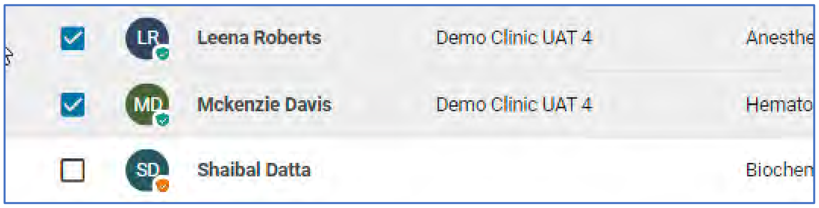


  - The *Filter pop-up* screen will close, returning you to the main *Physicians* contact screen. Any criteria entered using the pop-up screen will be cleared and ignored.

11.1.2 Sending SigMail Messages from the ‘Physician’ Contact List

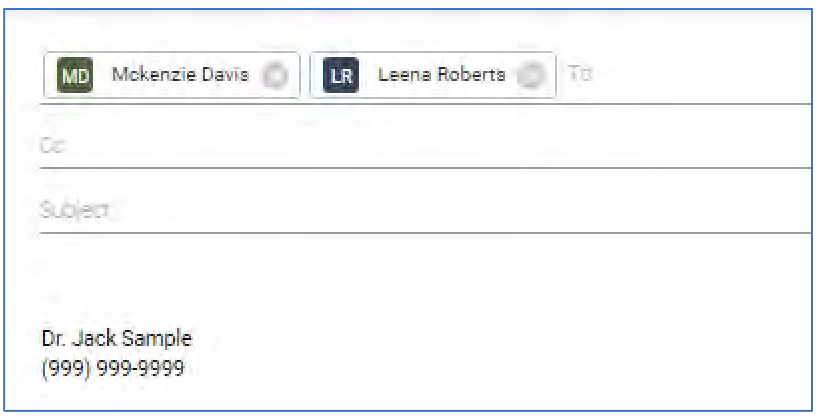
You can send a Message to any physician within SigMail directly from this *Physicians* Directory window. There are two methods:

- **One option is to select the Physician(s) that you wish to message from the directory list. Click on the checkbox of each row that you want selected.**



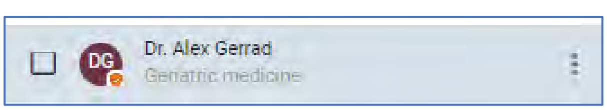
- Click the ***New Message icon*** located above the listing (to the left of the *Search* filter box).

- The right-hand side window will then display a draft message form.



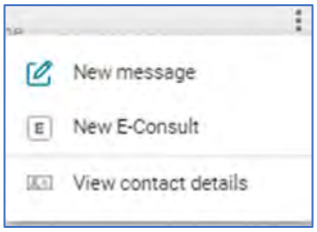
- The selected Physician(s) will be pre-populated in the 'To' field at the top of the form.
- Complete the remaining Message Content as needed (as you would when composing any other New Message).
- Click the '***Send***' button to issue the message (and return to the 'Physicians' Contact listing.)

- **Alternatively,** you can send a message to a selected Physician by positioning your cursor on the desired Physician row on the list. The row will be highlighted and allow you to **open the action menu (located to the right of the Physician name).**



- Click the menu icon to open the Action menu drop-down list for that row.

- Click the '***New message***' option on the Action menu



- The right-hand side window will then display the same draft message form.
- Again, the selected Physician(s) will be pre-populated in the 'To' field at the top of the message form.
- Complete the remaining Message Content as needed (as you would when composing any other New Message). Click the '***Send***' button to issue the message (and return to the 'Physicians' Contact listing.)

NOTE*:*

For additional details on creating a new SigMail message, please refer to **Chapter 8 (Sending a New Message)** above.

That chapter outlines various feature available for SigMail messages, including:

- setting Flag Indicators ('Important', 'Billable', 'Private')

- attaching supporting documents

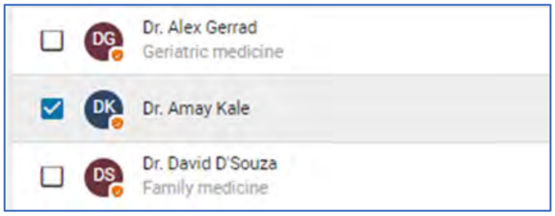
- save as a Draft (rather than Send)

11.1.3 Sending an E-Consult from the 'Physician' Contact List

You can send an E-Consult request to any physician within SigMail directly from this *Physicians* Directory window.

There are two methods to initiate an E-Consult:

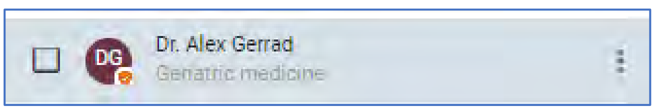
- **One option is to first select the Physician using the directory list. Click on the checkbox of the row that you want selected.**



- Click the ***New E-Consult icon*** located on the toolbar above the listing (to the right of the *Search* filter box).

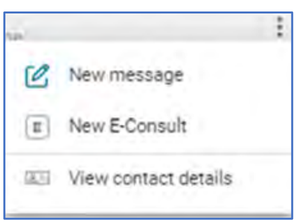
  - The right-hand side window will then display a draft *E-Consult form*.

- **Alternatively**, you can initiate an E-Consult to a Physician by positioning your cursor on the desired Physician row on the list. The row will be highlighted and allow you to **open the action menu (located to the right of the Physician name).**

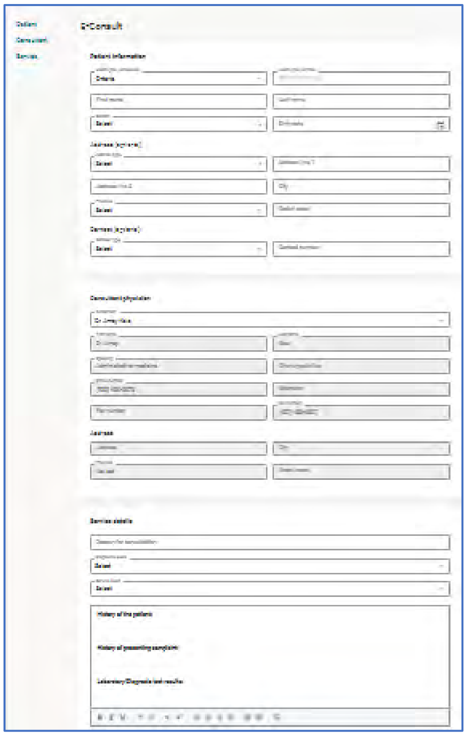


  - Click the menu icon to open the Action menu drop-down list for that physician.

  - Click the '*New E-Consult*' option on the action menu

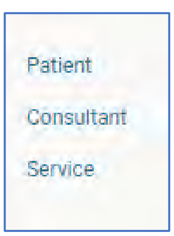


  - The right-hand side window will then display the same draft E-Consult form.

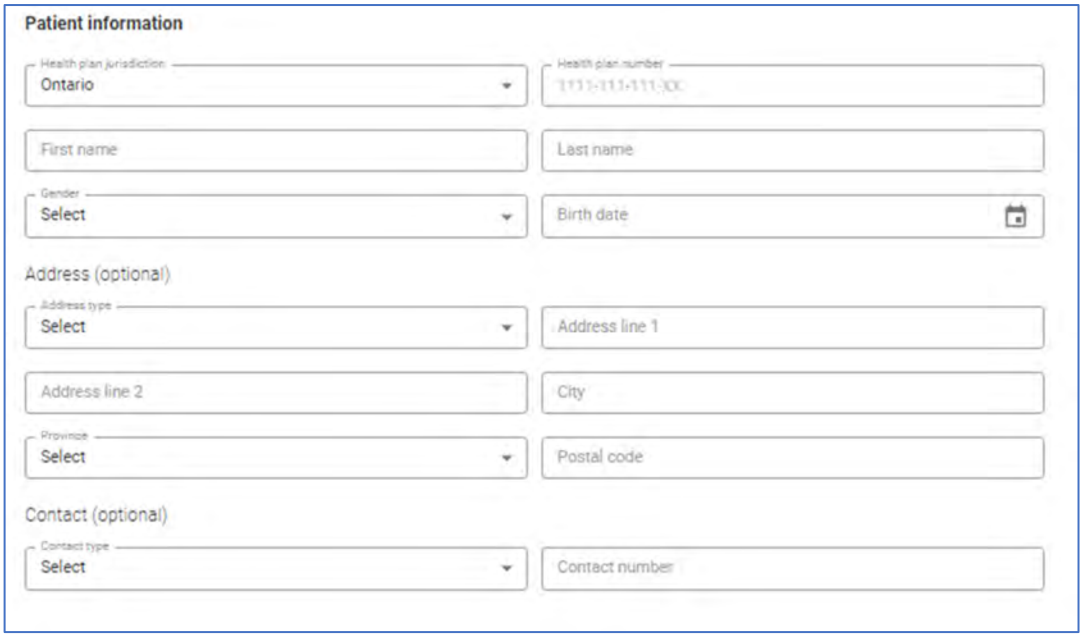


Regardless of which method was used to initiate the E-Consult, the steps to complete the form are the same.

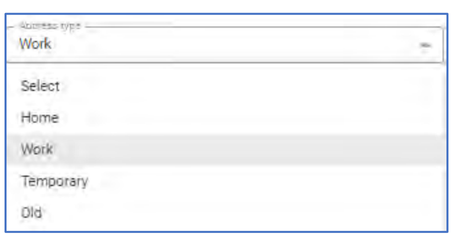
- The form has **three sections** to complete**.**
    - Use the scrollbar on the left-side of window to manually page down to each section of the form.
    - Alternatively, use the menu on the left-side of the form. Click on the menu options to automatically page to the selected section of the form.



- Complete the ***Patient Information*** section:

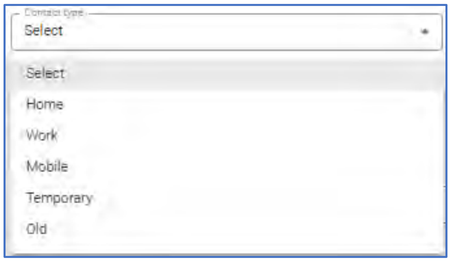


- Select the patient's ***Health plan jurisdiction***. (This field will initially default to 'Ontario'. Use the drop-down list associated with this field to select a different province if required.)
- Enter the patient's ***Health plan number***. (The field will be validated to ensure the correct plan number format is entered based on the selected jurisdiction.)
- Enter the patient's name (***First name***, ***Last name***).
- Select the patient's ***Gender*** using the drop-down list associated with this field).
- Enter the patient's ***Birth date***. The value can be manually entered in YYYY-MM-DD format. Alternatively use the calendar icon associated with field (to open a calendar grid to select the year and date using a calendar view).
- Complete the ***Address*** details (optional):
    - Select an *Address type* (using the drop-down list associated with the field).



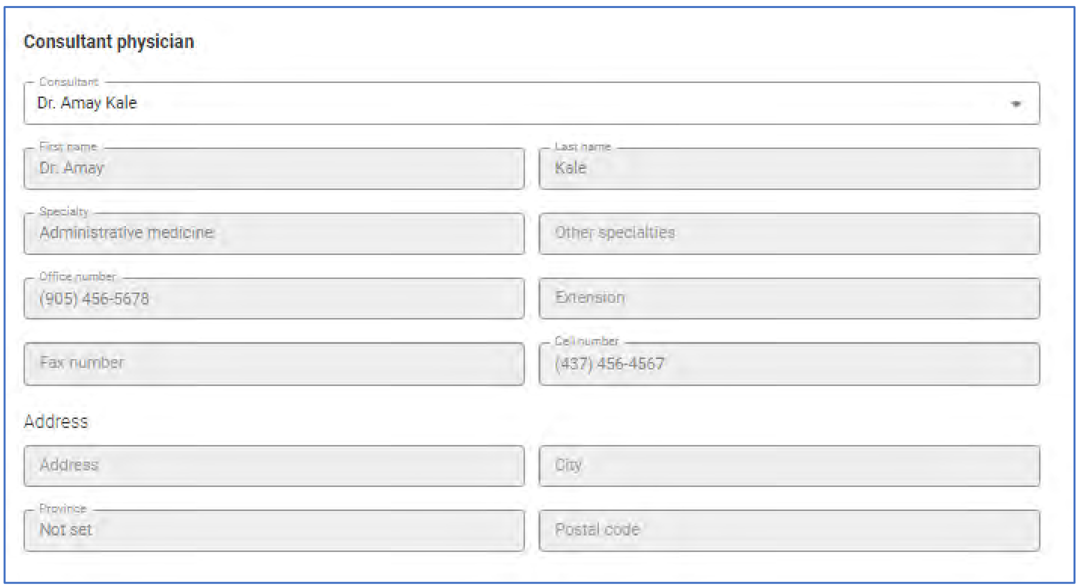
    - Enter the *Address line 1* and *Address line 2.*
    - Enter the *City*.
    - Select the *Province* (using the drop-down list associated with the field)
    - Enter the *Postal Code*.
- Complete the ***Contact*** details (optional):

- Select a *Contact type* (using the drop-down list associated with the field).



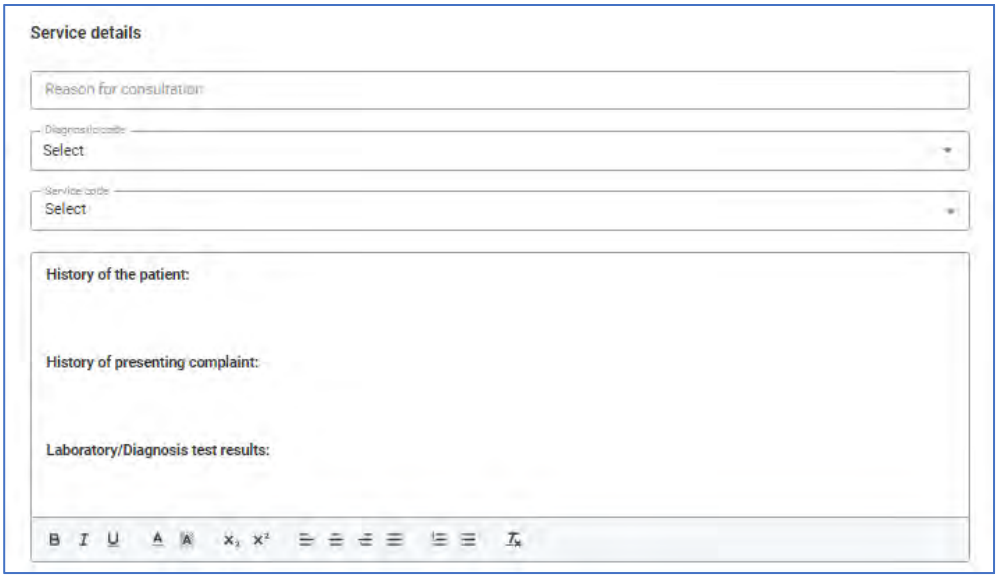
- Enter the Contact number (phone number of the patient for the selected Contact type).

▪ Review the ***Consultant physician*** section:

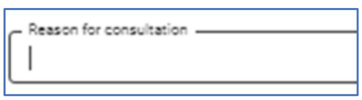


- The ***Consultant*** field will be pre-populated with the physician (as selected on the 'Physician' Contact List).
  - *If you decide that the E-Consult should go to a different physician, use the drop-down list associated with this field to select a different recipient.*
- The remaining fields in this section display the details associated with the select physician (as retrieved from that physician's SigMail account profile).
  - *These fields are displayed for information only; they are non-editable.*

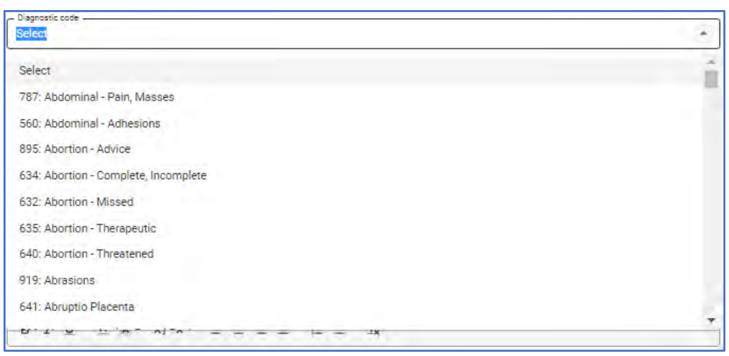
▪ Complete the ***Service details*** section:



- Enter a ***Reason for consultation***.
  - *Click on the field. The field will be enabled for text entry. Type a brief description for the requested E-Consult.*



- Select a ***Diagnostic code***.
  - *Click on the field. A drop-down list of the available Diagnostic code values will be displayed.*



  - *Click on the appropriate Diagnostic code value on the drop-down. The drop-down will close and the selected value will be populated.*
- Select a ***Service code***.
  - *Click on the field. A drop-down list of the available Service code values will be displayed.*

- Complete the remaining background detail for the patient in the textbox provided:

  - Enter a brief text description for ***History of the patient*** under the provided heading.
  - Enter a brief text description for ***History of the presenting*** complaint under the provided heading.
  - Enter a brief text description for ***Laboratory/Diagnosis test results*** under the provided heading.

NOTE*:*

A formatting toolbar is provided at the bottom of the textbox to assist you in formatting the text in this area.

- To **attach documents** to your E-Consult:
  - *Click on the ‘Attach documents’ button at the bottom of the E-Consult form (located beside the ‘Send’ button).*

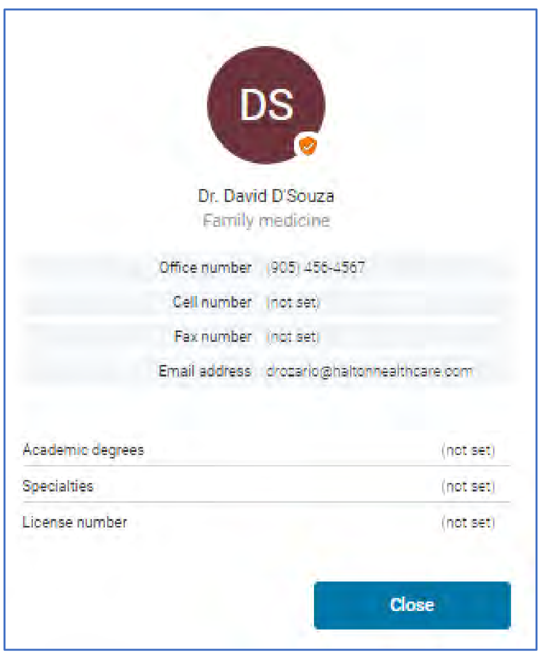
  - *This will open a pop-up window of your computer’s file folders (for you to select the document(s) you wish to attach).*

- To **Send** the E-Consult:
  - Click the ‘***Send***’ button to issue the E-Consult (and return to the ‘Physicians’ Contact listing.)

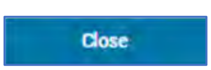
11.1.4 Viewing Contact Details of a ‘Physicians’ Contact

To view the specific details of an individual Physician:

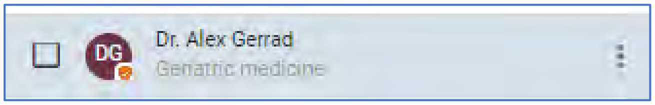
- Double-click on the row of the Physician directory listing.
  - The ‘***Contact Details’ pop-up window*** will be presented with the details for the selected physician.



- Click the ‘*Close’* button to close the pop-up window and return to the ‘Physicians’ Contact list.

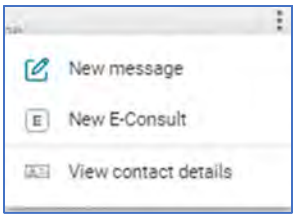


- **Alternatively**, you can view the Contact Details by positioning your cursor on the desired Physician row on the list. The row will be highlighted and allow you to **open the action menu** (located to the right of the Physician name)**.**



  - Click the menu icon to open the Action menu drop-down list for that physician.

  - Click the '*View contact details'* option on the action menu



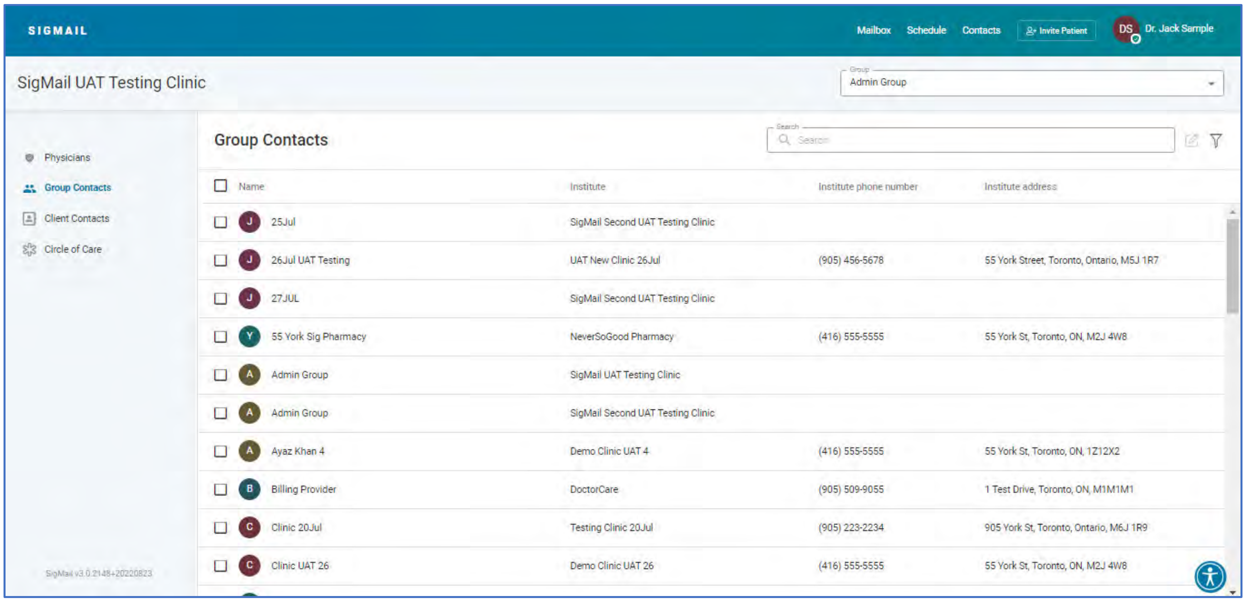
  - The same '***Contact Details' pop-up window*** will be presented with the details for the selected physician.

11.2 Using your 'Group Contacts' Directory

The '***Group Contacts'*** Directory provides you a listing of ***all offices or clinics*** utilizing the ***SigMail system.*** *The Group Contacts listing allows you to* easily access the Contact Details of that Group/Institution and *send a secure SigMail Message to their* ***Shared Inbox***. The listing under name give you the name of the Shared Inbox, and the listing under Institute gives a more descriptive name of the medical office of the physician.

11.2.1 Searching and Filtering the 'Group Contacts' List

When viewing the *Group Contacts* directory:

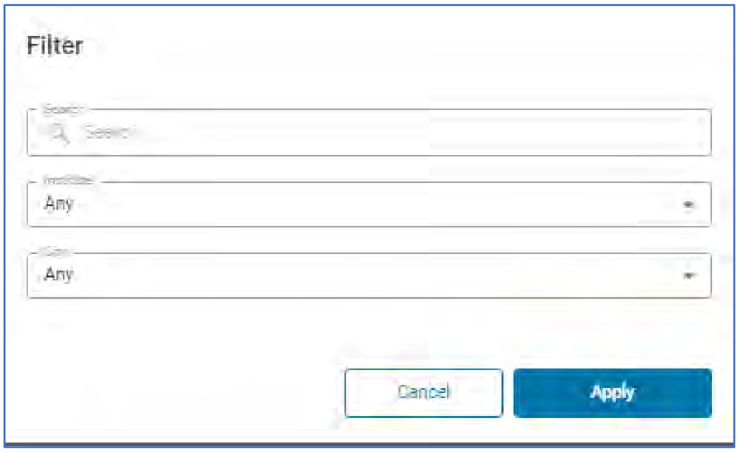


- At the top of the window, you are provided with a '***Search***' box that allows you to search and filter the *Group Contacts* list based on specific text:

  - Start entering text within the 'Search' text box.
  - As you type each character, the list will immediately be filtered to only include those Group Contacts that contain that matching character string. ***Matching is performed using the 'Name', 'Institute', 'Institute phone number' and 'Institute address' column values.*** If the entered 'Search' character string matches the characters found in *any* of these four columns, only those Group Contact rows will remain on the filtered list.

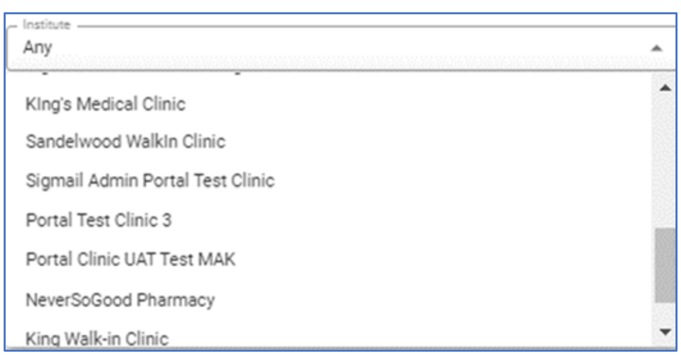
- Additional filtering capabilities are available using a ***Filter pop-up screen***.
  - Click the *Filter* icon located above the listing (to the left of the *Search* field).

  - A *Filter pop-up window* will be displayed.

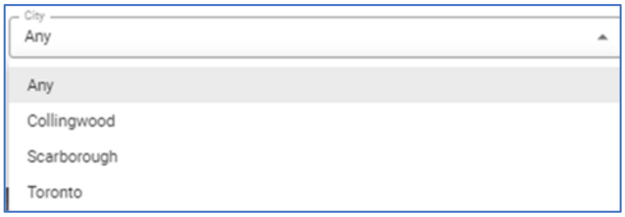


- The ***'Search'** box* allows you to search and filter the Group Contacts list based on specific text:
    - Enter text within the 'Search' text box to include only those Group Contacts that contain the matching character string. Matching is performed using the 'Name', 'Institute', 'Institute phone number' and 'Institute address' column values.

      (NOTE: This is the same 'Search' filter text box capability that appears on the main Group Contacts directory screen. If you had already entered a 'Search' value on the main screen before opening the pop-up, the entered value will be displayed (and editable) on this pop-up.)
- The **'*Institute*'** box allows you to filter the Group Contacts list based on a selected Institute:
    - Click on the field to open the drop-down list. Select a specific Institute using the list (if applicable).

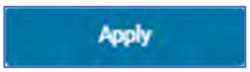


- The **'*City*'** box allows you to filter the Group Contacts list based on a selected City location:
    - Click on the field to open the drop-down list. The list will display all City locations of the Group Contacts on your SigMail list.



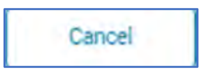
- Select a specific City from the drop-down (if applicable).

- Once you have completed your entries/selections within the *Filter pop-up*, click the ***Apply*** button.



- The *Filter pop-up* screen will close, returning you to the main *Group Contacts* contact screen. The Group Contacts list will now be filtered to include only those contacts that match the criteria you entered on the pop-up.

- Alternatively, if you wish to return to the main Group Contacts screen *without using the Filter pop-up criteria*, click the *Cancel* button.

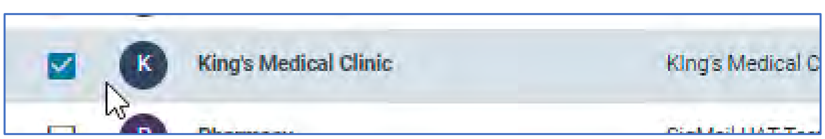


- The *Filter pop-up* screen will close, returning you to the main *Group Contacts* screen. Any criteria entered using the pop-up screen will be cleared and ignored.

11.2.2 Sending SigMail Messages from the 'Group Contacts' List

You can send a New Message to the Shared Inbox of any Group Contact within SigMail directly using this Group Contacts Directory window. There are two methods:

- **One option is to select the Group Contact that you wish to message from the directory list. Click on the checkbox of the row that you want selected.**



- Click the ***New Message icon*** located above the listing (to the left of the *Search* filter box).

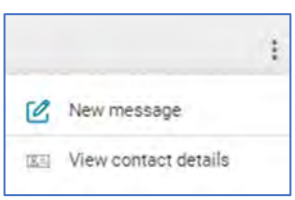
- The right-hand side window will then display a draft message form.

- The selected Group Contact will be pre-populated in the 'To' field at the top of the form.
- Complete the remaining Message Content as needed (as you would when composing any other New Message).
- Click the '***Send***' button to issue the message (and return to the 'Group Contacts' directory listing.)

- **Alternatively,** you can send a message to a selected Group Contact by positioning your cursor on the desired contact row on the list. The row will be highlighted and allow you to **open the action menu (located to the right of the Group Contact name).**

- Click the menu icon to open the Action menu drop-down list for that contact row.

- Click the '***New message***' option on the Action menu



- The right-hand side window will then display the same draft message form.
- Again, the selected Group Contact will be pre-populated in the 'To' field at the top of the message form.

- Complete the remaining Message Content as needed (as you would when composing any other New Message). Click the '***Send***' button to issue the message (and return to the 'Group Contacts' directory listing.)

NOTE*:*

For additional details on creating a new SigMail message, please refer to **Chapter 8 (Sending a New Message)** above.

That chapter outlines various feature available for SigMail messages, including:

- setting Flag Indicators

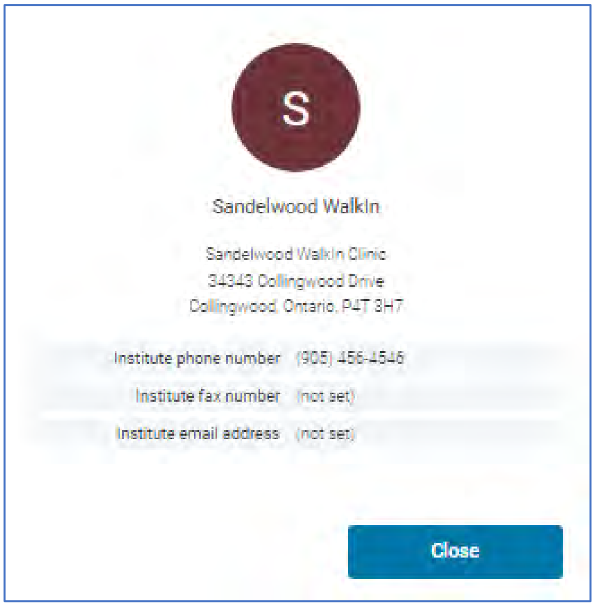
- attaching supporting documents

- save as a Draft (rather than Send)

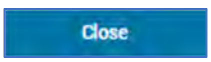
11.2.3 Viewing Contact Details of a 'Group Contact'

To view the specific details of an individual Group Contact:

- Double-click on the row of the Group Contact directory listing.
  - The '***Contact Details' pop-up window*** will be presented with the details for the selected Group Contact.



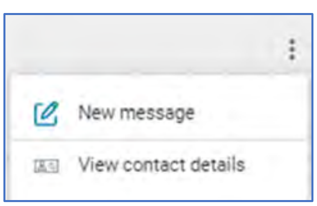
- Click the '*Close'* button to close the pop-up window and return to the 'Group Contacts' directory list.



- **Alternatively**, you can view the Contact Details by positioning your cursor on the desired Group Contacts row on the list. The row will be highlighted and allow you to **open the action menu** (located to the right of the Group Contact's name).

- Click the menu icon to open the Action menu drop-down list for that physician.

- Click the '*View contact details'* option on the action menu



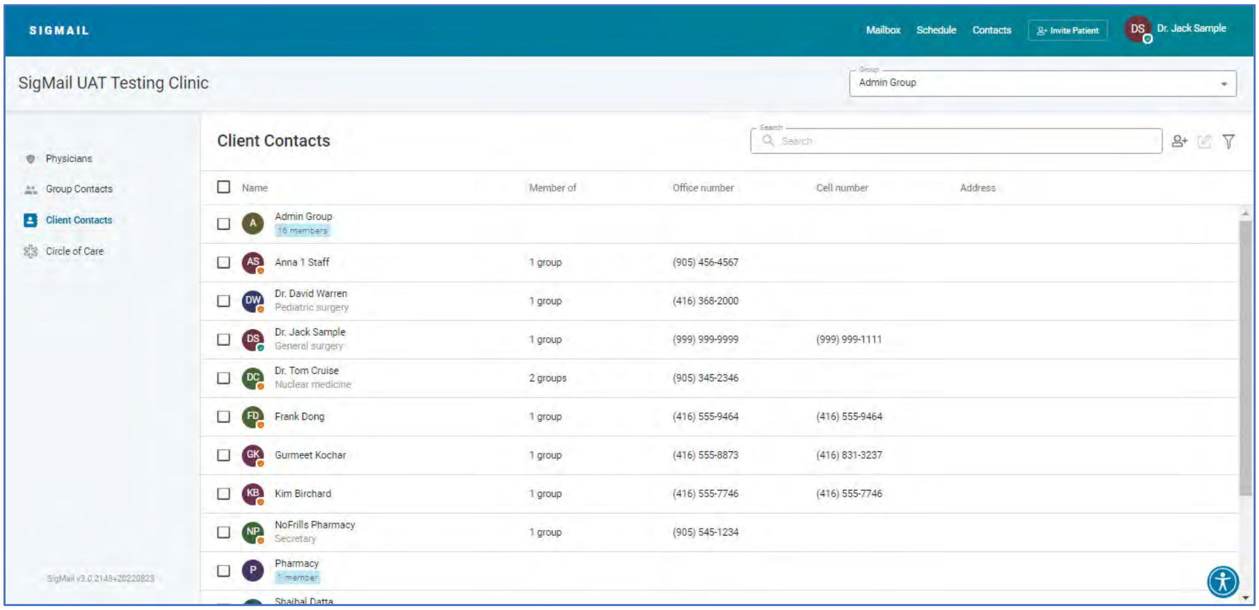
- The same '***Contact Details' pop-up window*** will be presented with the details for the selected Group Contact.

11.3 Using your 'Client Contacts' Directory

The '***Client Contacts'*** Directory provides you a listing of your personal Client Contacts. These are usually the individual physicians or admin staff using SigMail that belong to your own institution and the Shared Inboxes that you can message.

11.3.1 Searching and Filtering the 'Client Contacts' List

When viewing the *Client Contacts* Directory (in the right-hand side window):

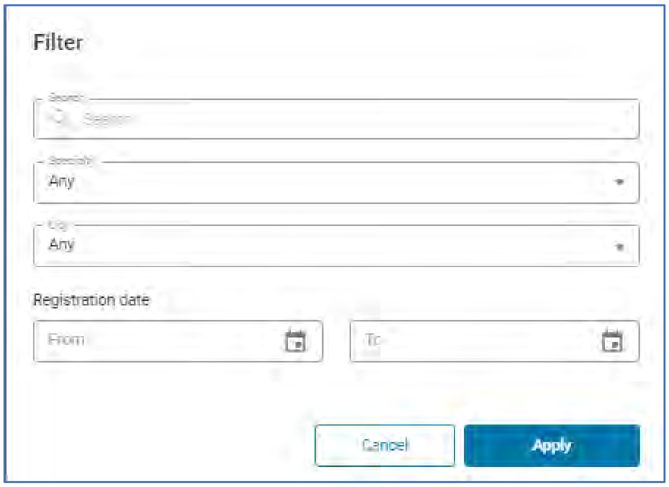


- At the top of the window, you are provided with a '***Search***' box that allows you to search and filter the *Group Contacts* list based on specific text:

  - Start entering text within the 'Search' text box.
  - As you type each character, the list will immediately be filtered to only include those Client Contacts that contain that matching character string. ***Matching is performed using the 'Name', 'Member of', 'Office number', 'Cell number' and 'Address' column values.*** If the entered 'Search' character string matches the characters found in *any* of these five columns, only those Client Contact rows will remain on the filtered list.

- Additional filtering capabilities are available using a ***Filter pop-up screen***.
  - Click the *Filter* icon located above the listing (to the left of the *Search* field).

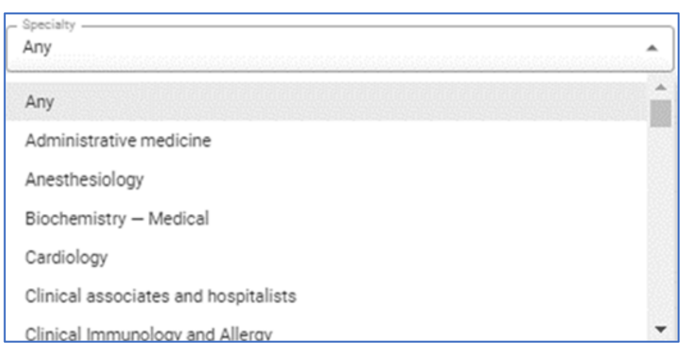
- A *Filter pop-up window* will be displayed.



- The **'*Search'*** *box* allows you to search and filter the Client Contacts list based on specific text:
  - Enter text within the 'Search' text box to include only those Client Contacts that contain the matching character string. Matching is performed using the 'Name', 'Member of', 'Office number', 'Cell number' and 'Address' column values.

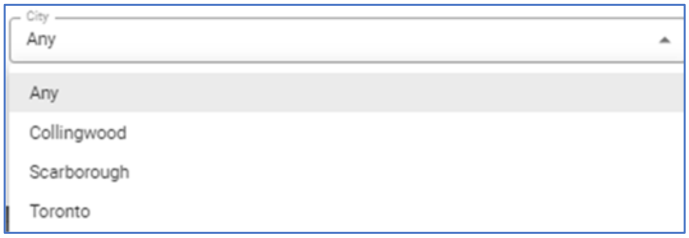
    (NOTE: This is the same 'Search' filter text box capability that appears on the main Client Contacts directory screen. If you had already entered a 'Search' value on the main screen before opening the pop-up, the entered value will be displayed (and editable) on this pop-up.)

- The **'*Specialty'*** box allows you to filter the Client Contacts list based on a selected Specialty:
  - Click the field to open the drop-down list. Select a specific Specialty using the list (if applicable).



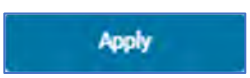
- The **'*City'*** box allows you to filter the Client Contacts list based on a selected City location:

- Click on the field to open the drop-down list. The list will display all City locations of the Physicians on your SigMail list. Select a specific *City* value from the drop-down (if applicable).



- The ***Registration date 'To'*** and ***Registration date 'From'*** boxes allow you to filter the Client Contacts list based the SigMail Registration Date of these contacts:
  - Use each of these fields to enter your search date range. The value can be manually entered in YYYY-MM-DD format.
  - Alternatively use the calendar icon associated with field (to open a calendar grid to select the year and date using a calendar view).
    - If you specify a date range (both a 'To' and 'From' date), the Client Contacts list will be filtered to include those contacts whose Registration Dates fall *within this range* of dates.
    - If you specify only a 'To' date, the filter will include all contacts whose Registration Dates are *on or after* that date.
    - If you specify only a 'From' date, the filter will include all contacts whose Registration Dates are *on or before* that date.

- Once you have completed your entries/selections within the *Filter pop-up*, click the ***Apply*** button.



  - The *Filter pop-up window* will close, returning you to the *Client Contacts* directory listing. The listing will now be filtered; only those Client Contacts that matched the selected criteria will be listed.

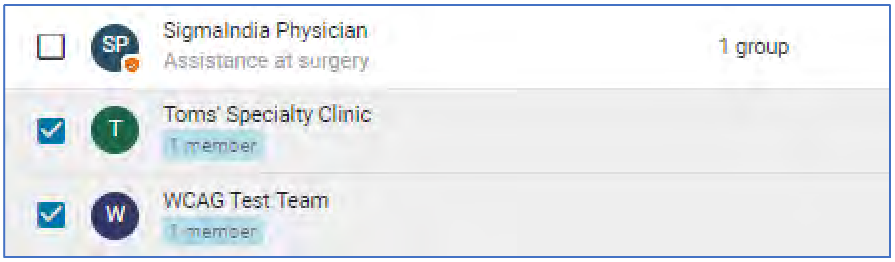
- Alternatively, if you wish to return to the main *Client Contacts* directory screen *without using the Filter pop-up criteria*, click the *Cancel* button.

  - The *Filter pop-up* screen will close, returning you to the main *Client Contacts* directory screen. *Any criteria entered using the pop-up screen will be cleared and ignored.*

11.3.2 Sending SigMail Messages from the ‘Client Contacts’ List

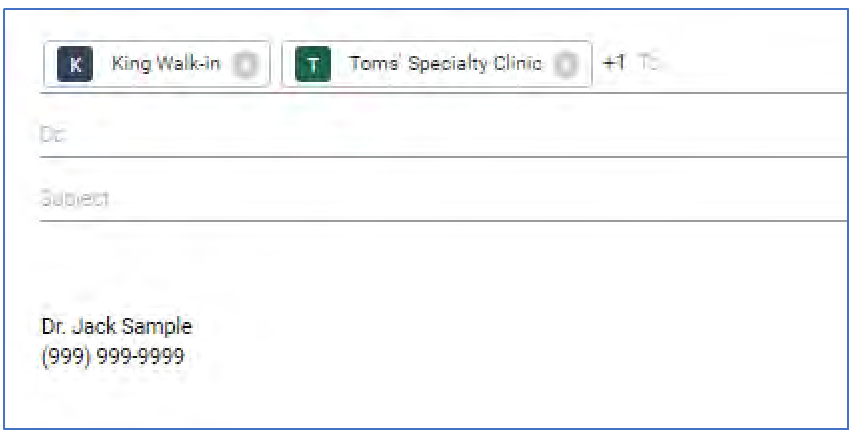
You can send a New Message to any of your Client Contacts within SigMail directly from this Client Directory window. There are two methods:

- **One option is to select the Client Contact(s) that you wish to message from the directory list.** Click on the checkbox of the row(s) that you want selected.



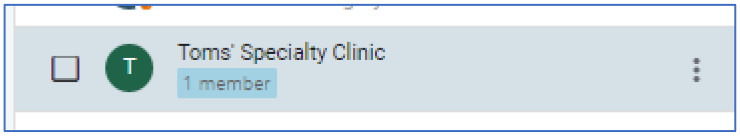
- Click the ***New Message icon*** located above the listing (to the left of the *Search* filter box).

- The right-hand side window will then display a draft message form.



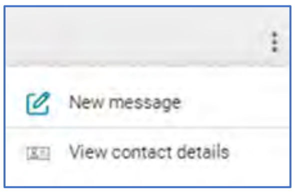
- The selected Client Contact(s) will be pre-populated in the ‘To’ field at the top of the form.
- Complete the remaining Message Content as needed (as you would when composing any other New Message).
- Click the ‘***Send***’ button to issue the message (and return to the ‘Client Contacts’ directory listing.)

- **Alternatively,** you can send a message to a selected Client Contact by positioning your cursor on the desired contact row on the list. The row will be highlighted and allow you to **open the action menu (located to the right of the Client Contact name).**



  - Click the menu icon to open the Action menu drop-down list for that contact row.

  - Click the '***New message***' option on the Action menu



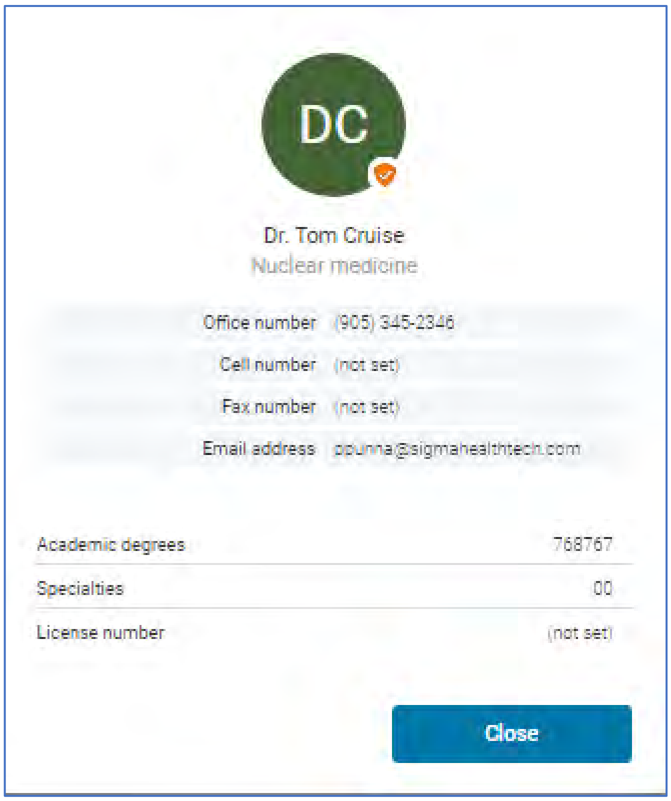
  - The right-hand side window will then display the same draft message form.
  - Again, the selected Client Contact will be pre-populated in the 'To' field at the top of the message form.
  - Complete the remaining Message Content as needed (as you would when composing any other New Message). Click the '***Send***' button to issue the message (and return to the 'Client Contacts' directory listing.)

> **NOTE***:*
>
> For additional details on creating a new SigMail message, please refer to **Chapter 8 (Sending a New Message)** above.
>
> That chapter outlines various feature available for SigMail messages, including:
>
> *- setting Flag Indicators*
>
> *- attaching supporting documents*
>
> *- save as a Draft (rather than Send)*

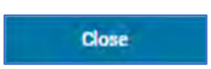
11.3.3 Viewing Contact Details of a 'Client Contact'

To view the specific details of an individual Client Contact:

- Double-click on the row of the Client Contacts directory listing.
  - The '***Contact Details' pop-up window*** will be presented with the details for the selected Client Contact.



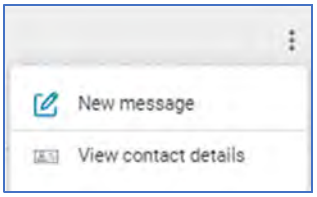
- Click the '*Close'* button to close the pop-up window and return to the 'Client Contacts' directory list.



- **Alternatively**, you can view the Contact Details by positioning your cursor on the desired Client Contact row on the list. The row will be highlighted and allow you to **open the action menu** (located to the right of the contact's name).

- Click the menu icon to open the Action menu drop-down list for that physician.

- Click the '*View contact details'* option on the action menu



- The same '***Contact Details' pop-up window*** will be presented with the details for the selected Client.

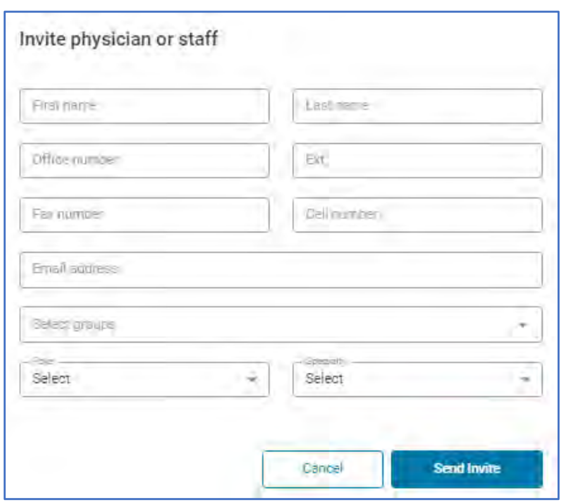
11.3.4 Inviting Physician of Staff from the 'Client Contacts' List

You can send a SigMail invitation to a Physician or Clinic Administrator using this 'Client Contacts' directory. The Physician/Administrator will then receive an automated message with instructions to complete the registration process and activate their own SigMail account.

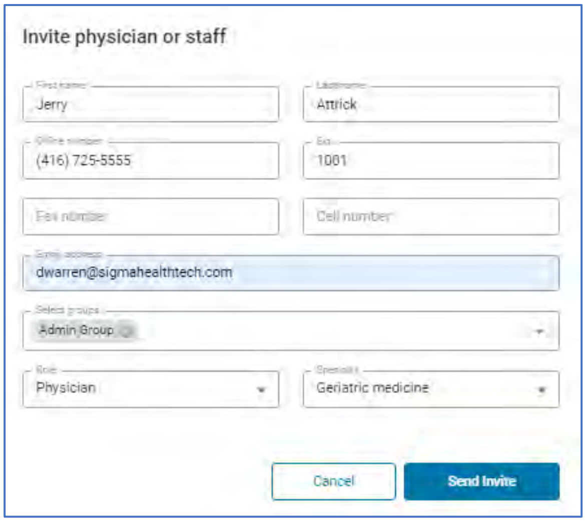
To send a SigMail invitation to a Physician or Clinic Administrator:

- Click the ***Invite physician or staff icon*** located above the listing (to the left of the *Search* filter box).

- An 'Invite physician or staff' pop-up window will be presented.



- Complete the 'Invite a physician or staff' form using the provided fields in the pop-up.



- Click the *Send Invite button* to issue the invitation.

- The *Invite physician or staff* pop-up window will close, returning you to the Client Contacts directory screen.

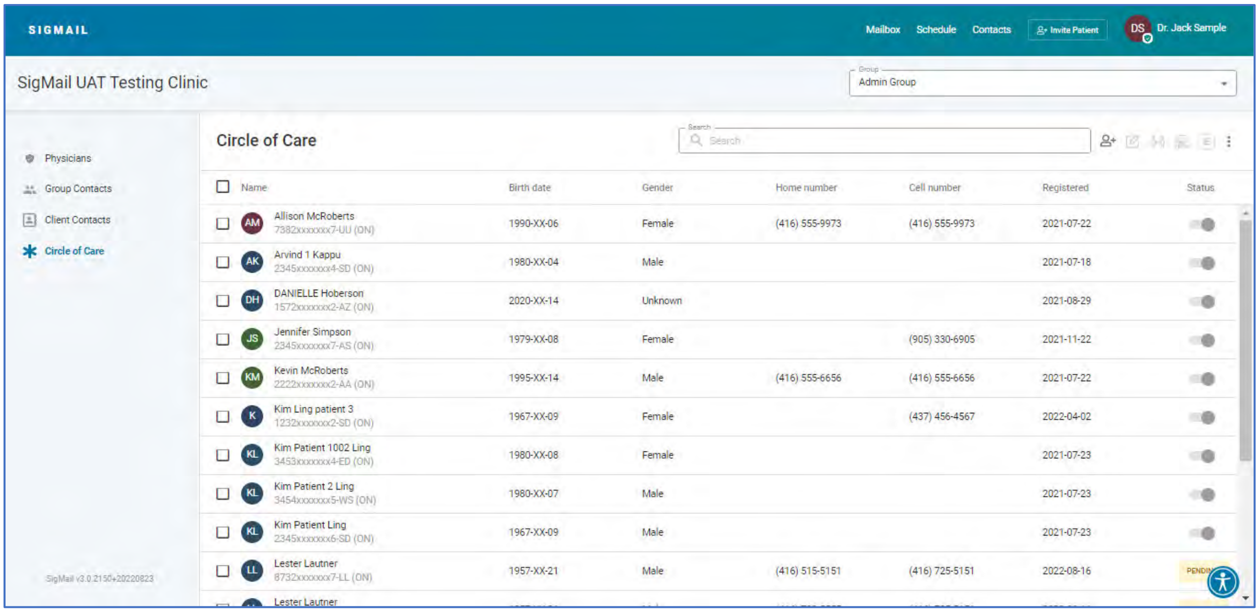
> NOTE:
>
> *The ability to send a SigMail invitation to a Physician or Clinic Administrator is also available via the 'Manage Members' screen. Please refer to* ***Section 15.3 ('Inviting Physicians & Staff')*** *below for these details.*
>
> *To monitor and manage invitations once they are sent, please refer to Section 15.4 ('Managing Pending Invitations (Resend / Revoke / Remove)' below.*

11.4 Using your 'Circle of Care' Directory

The '***Circle of Care'*** Directory provides you a listing of Patients assigned to your care or referred to you by another physician.

11.4.1 Searching and Filtering the 'Circle of Care' List

When viewing the *Circle of Care* directory list:



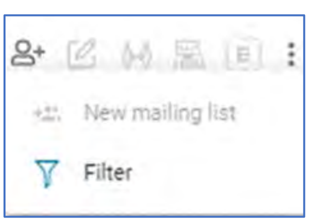
- At the top of the window, you are provided with a '***Search***' box that allows you to search and filter the *Circle of Care* list based on specific text:

  - Start entering text within the 'Search' text box.
  - As you type each character, the list will immediately be filtered to only include those Circle of Care contacts that contain that matching character string. ***Matching is performed using all column values ('Name', 'Birth date', 'Gender', 'Home number', 'Cell number' and 'Registered') of the screen.*** If the entered 'Search' character string matches the characters found in *any* of these six columns, only those Circle of Care rows will remain on the filtered list.

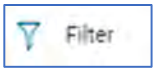
To further **Filter** the *Circle of Care* listing**:**

- Additional filtering criteria are available using a ***Filter pop-up screen***.
  - Click the *menu icon* symbol at the end of the toolbar (located to the left of the Search field at the top-right of the screen).

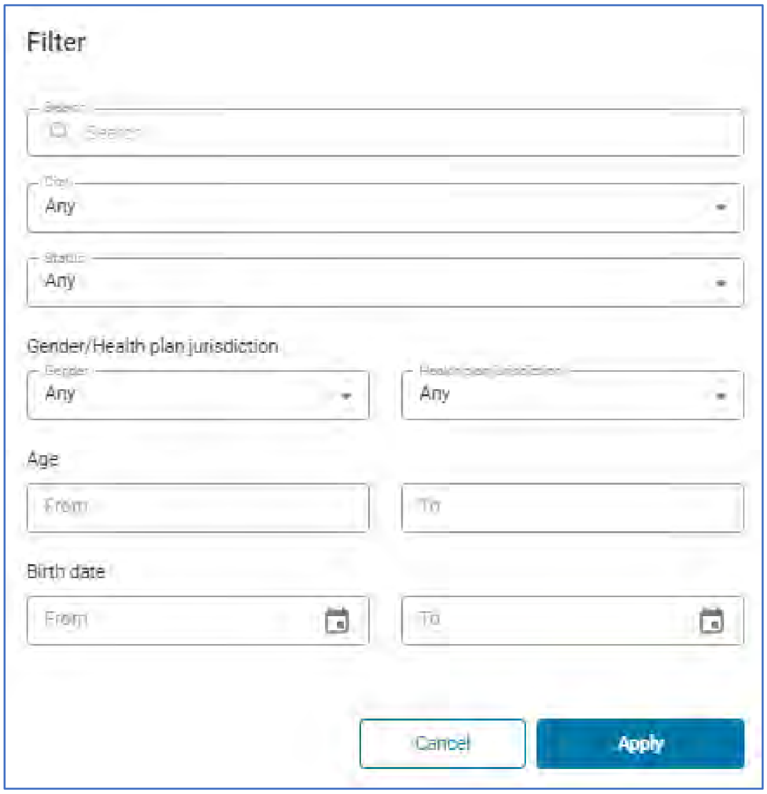
  - This will open a drop-down menu to *additional* toolbar functions.



- Click the *Filter* option on this drop-down menu.



- A *Filter pop-up window* will be displayed.

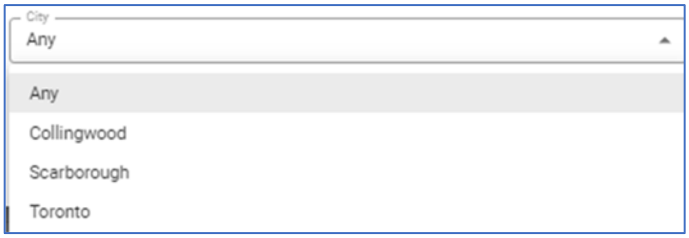


- Select one or more of the *Filter* criteria that you wish to use to search your Circle of Care directory to find matching contacts.

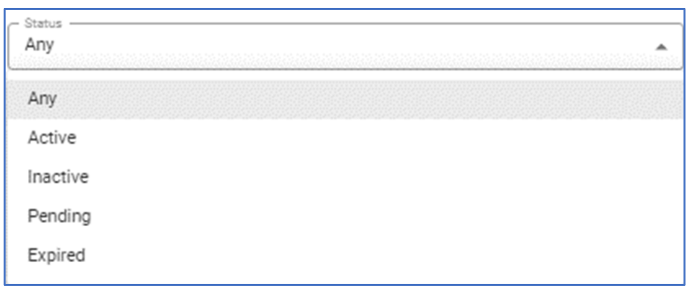
  - The ***‘Search’*** *box* allows you to search and filter the Circle of Care list based on specific text:
    - Enter text within the ‘Search’ text box to include only those Circle of Care contacts that contain the matching character string. Matching is performed using all displayed column values (‘Name’, ‘Birth date’, ‘Gender’, ‘Home number’, ‘Cell number’ and ‘Registered’) of the screen.

      (NOTE: This is the same ‘Search’ filter text box capability that appears on the main Circle of Care directory screen. If you had already entered a ‘Search’ value on the main screen before opening the pop-up, the entered value will be displayed (and editable) on this pop-up.)

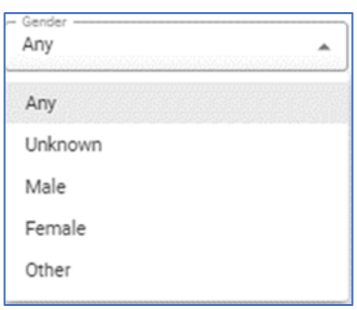
- The ‘***City***’ box allows you to filter the Circle of Care list based on a selected City location:
  - Click on the field to open the drop-down list. The list will display all City locations of the contacts on your Circle of Care list. Select a specific *City* value from the drop-down (if applicable).



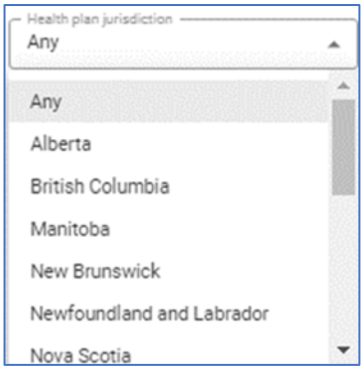
- The ‘***Status***’ box allows you to filter the Circle of Care list based on the Status of the contact’s SigMail account:
  - Click on the field to open the drop-down list. The list will display the different Status values. Select a specific *Status* value from the drop-down (if applicable).



- Select a ***Gender*** using the field drop-down list (if applicable).



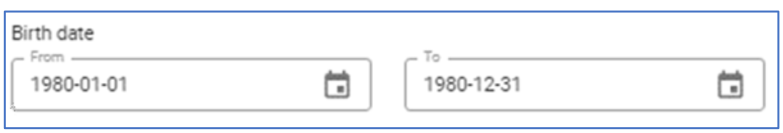
- Select a ***Health Plan Jurisdiction*** using the field drop-down list (if applicable).



- Set a specific ***Age** Range* using the *From* and *To* fields.

  - Use each of these fields to enter your Age range search.
    - If you specify an age range (both a ‘To’ and ‘From’ value), the Circle of Care list will be filtered to include those contacts whose ages fall *within this range.*
    - If you specify only a ‘To’ value, the filter will include all contacts who are *that age or younger*.
    - If you specify only a ‘From’ date, the filter will include all contacts who are *that age or older*.

- Set a ***Birth Date** Range* by using the *From* and *To* drop-down lists.



  - Use each of these fields to enter your search date range. The value can be manually entered in YYYY-MM-DD format.
  - Alternatively use the calendar icon associated with field (to open a calendar grid to select the year and date using a calendar view).
    - If you specify a date range (both a ‘To’ and ‘From’ date), the Circle of Care list will be filtered to include those contacts whose Birth Dates fall *within this range* of dates.
    - If you specify only a ‘To’ date, the filter will include all contacts whose Birth Dates are *on or after* that date.
    - If you specify only a ‘From’ date, the filter will include all contacts whose Birth Dates are *on or before* that date.

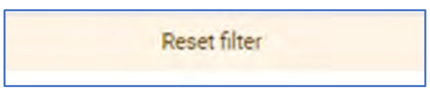
- Once you have completed your entries/selections within the *Filter pop-up*, click the ***Apply*** button.

  - The *Filter pop-up window* will close, returning you to the *Circle of Care* directory listing. The listing will now be filtered; only those Circle of Care contacts that matched the selected criteria will be listed.

- Alternatively, if you wish to return to the main Circle of Care directory screen *without using the Filter pop-up criteria*, click the *Cancel* button.

  - The *Filter pop-up* screen will close, returning you to the main *Circle of Care* directory screen. *Any criteria entered using the pop-up screen will be cleared and ignored.*

If the Circle of Care list has been filtered, a pink banner labeled '*Reset filter*' will appear above the listing.

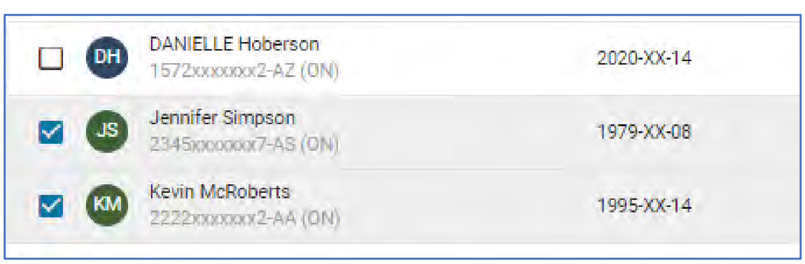


- To remove any filtering criteria, click the *'**Reset filter**' banner*.
- The *Circle of Care* directory listing will be refreshed; the full (unfiltered) list of contacts will be restored to the list.

11.4.2 Sending SigMail Messages from the 'Circle of Care' List

You can send a New Message to any of your Circle of Care contacts within SigMail directly from this Circle of Care directory. There are two methods:

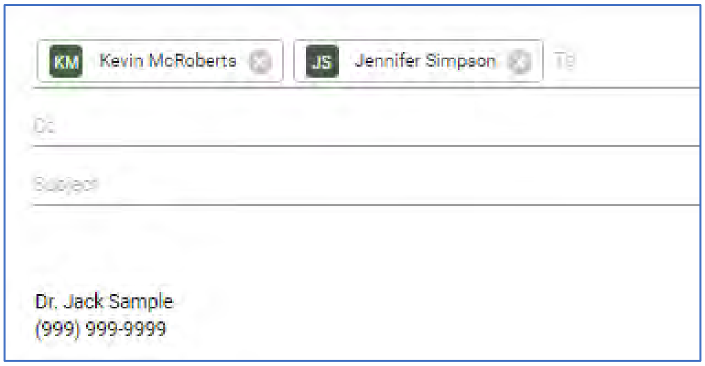
- **One option is to select the Circle of Care contact(s) that you wish to message from the directory list.** Click on the checkbox of the row(s) that you want selected.



- Click the ***New Message icon*** located above the listing (ton the toolbar o the left of the *Search* filter box).

  - The right-hand side window will then display a draft message form.

  - The selected Circle of Care contact(s) will be pre-populated in the 'To' field at the top of the form.
  - Complete the remaining Message Content as needed (as you would when composing any other New Message).
  - Click the '***Send***' button to issue the message (and return to the 'Circle of Care' directory listing.)

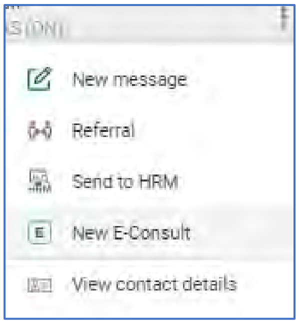
    

▪ **Alternatively,** you can send a message to a selected Circle of Care contact by positioning your cursor on the desired contact row on the list. The row will be highlighted and allow you to **open the action menu** (located to the right of the contact's name).

  - Click the menu icon to open the Action menu drop-down list for that contact row.

  - Click the '***New message***' option on the Action menu



- The right-hand side window will then display the same draft message form.
- Again, the selected Circle of Care contact will be pre-populated in the ‘To’ field at the top of the message form.
- Complete the remaining Message Content as needed (as you would when composing any other New Message). Click the ‘***Send***’ button to issue the message (and return to the ‘Circle of Care’ directory listing.)

NOTE*:*

For additional details on creating a new SigMail message, please refer to **Chapter 8 (Sending a New Message)** above.

That chapter outlines various feature available for SigMail messages, including:

- *setting Flag Indicators*

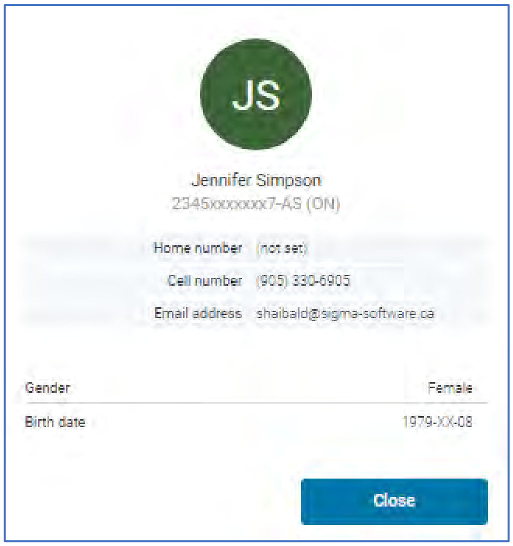
- *attaching supporting documents*

- *save as a Draft (rather than Send)*

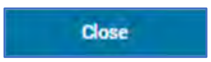
11.4.3 Viewing Contact Details of a ‘Circle of Care’ contact

To view the specific details of an individual Circle of Care contact:

- Double-click on the row of the Circle of Care directory listing.
  - The ‘***Contact Details’ pop-up window*** will be presented with the details for the selected contact.



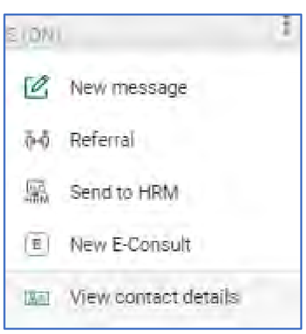
- Click the '*Close'* button to close the pop-up window and return to the 'Circle of Care' directory list.



- **Alternatively**, you can view the Contact Details by positioning your cursor on the desired Circle of Care row on the list. The row will be highlighted and allow you to **open the action menu** (located to the right of the contact's name)**.**

- Click the menu icon to open the Action menu drop-down list for that physician.

- Click the '*View contact details'* option on the action menu



- The same '***Contact Details' pop-up window*** will be presented with the details for the selected Circle of Care contact.

11.4.4 Referring a Patient

The Circle of Care directory can also be used to refer a Patient to another Physician.
There are two methods to initiate a Referral:

- Select the Patient on the Circle of Care directory listing.
  - Click on the checkbox of the row to select it.

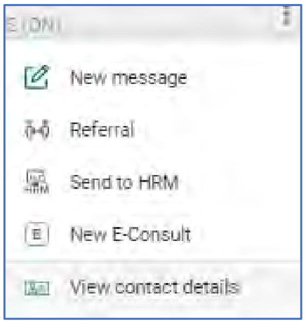
  - Click the ***Referral icon*** located on the toolbar in the top-right corner of the window (beside the Search field).

  - A draft ***Patient Referral form*** will be automatically created and displayed for the selected Patient. (The right-hand side window will no longer display the Circle of Care list. Instead, a 'Patient Referral' Request form will be displayed.)

- Alternatively, you can initiate the *Referral* using the *action menu* of the desired contact row.
  - Position your cursor on the desired Circle of Care row. The row will be highlighted and allow you to **open the *action menu*** (located to the right of the contact's name).

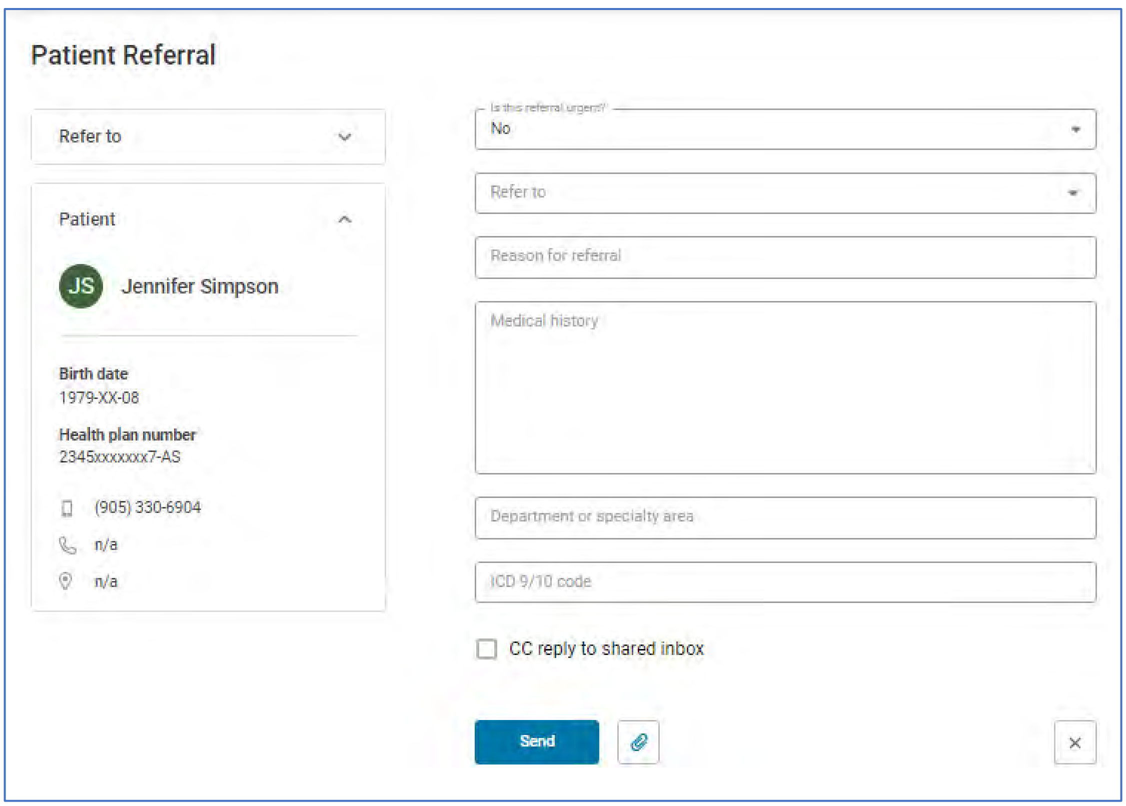
  - Click the *menu icon* to open the Action menu drop-down list for that physician.

  - Click the '*Referral'* option on the action menu

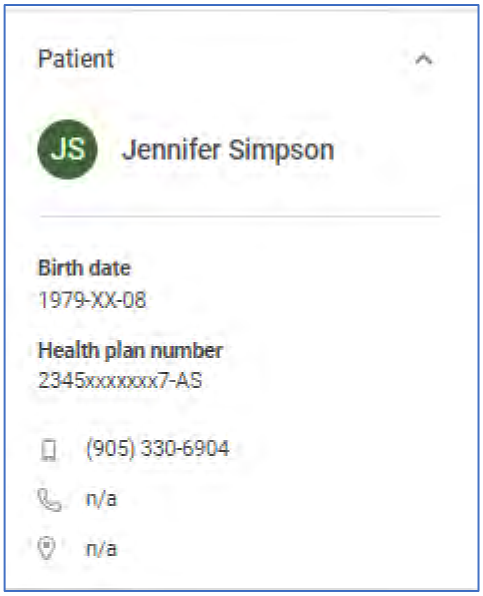


- The same draft *Patient Referral form* will be automatically created and displayed for the selected Patient.

Regardless of which method was used to initiate the Referral, the steps to complete the form are the same.

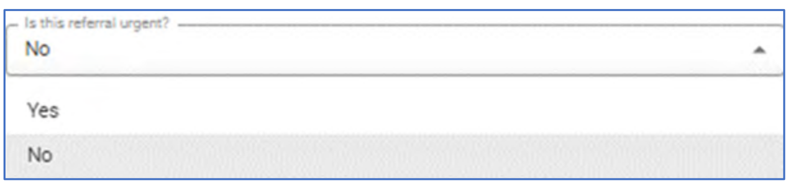


- The *Referral Request form* will be pre-populated with the patient details (as retrieved from their SigMail account profile) within the '***Patient***' area on the left-side of the form.

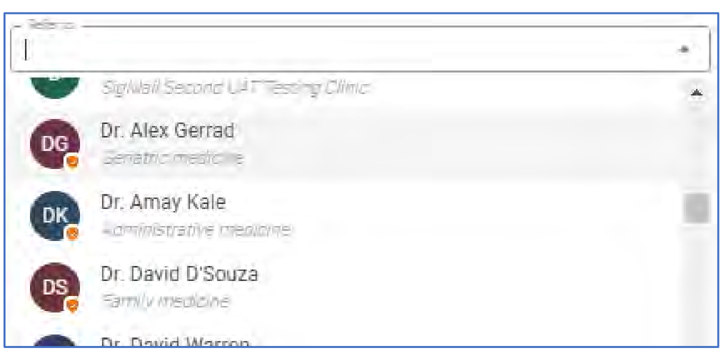


- The *Referral Request form* details will need to be completed using the provided fields.

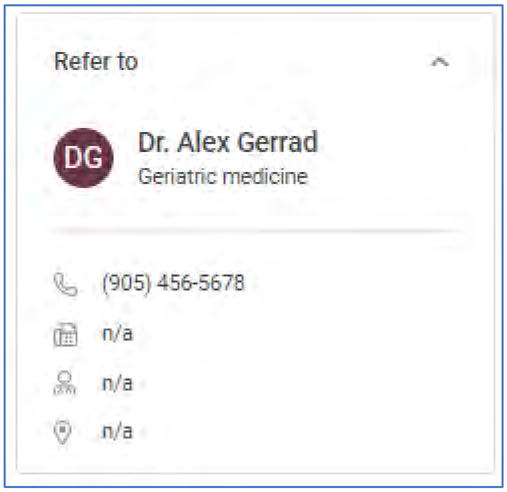
  - Click the *‘**Is this referral urgent?**’ field*. Use the drop-down list to mark the Referral as ‘Yes’ or ‘No’ (as appropriate).



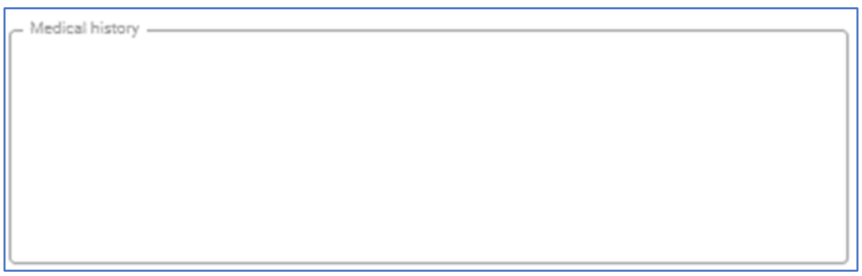
  - Click the *‘**Refer to**’* field. Use the drop-down list to select the Physician that this patient is being referred to.



    - Once a ‘Refer to’ selection is made, the physician details (as retrieved from their SigMail account profile) will be presented within the ***‘Refer to**’* area on the left-side of the form



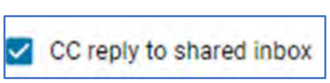
- Click the '***Medical history***' *field*. The field will be enabled for entry. Enter a brief text description of the patient's medical history.



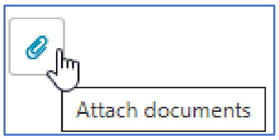
- Click the '***Department or specialty area***' *field*. The field will be enabled for entry. Enter a brief text description.

- Click the '***ICD 9/10 code***' *field*. The field will be enabled for entry. Enter the appropriate code value.

- Click the '***CC reply to shared inbox***' *checkbox to indicate if the Referral reply should be copied to your 'Shared Inbox'.*



- To ***attach documents*** to your Referral:
  - *Click on the 'Attach documents' button at the bottom of the Referral form (located beside the 'Send' button).*
- *This will open a pop-up window of your computer's file folders (for you to select the document(s) you wish to attach.)*



> *NOTE: This would typically be used for securely exchanging test results (such as blood pressure, EKG strips, heart rates, and oxygen levels) with the referred physician.*

- Once the details are completed, click the '**Send**' button to issue the referral.

- The *Referral Request form* will then be closed, returning you to the *Circle of Care* directory list.
- The Referral message will be sent to the specified Physician. (*You can now view that Referral message under the 'Sent' folder of your mailbox.)*

11.4.5 Creating Mailing Lists

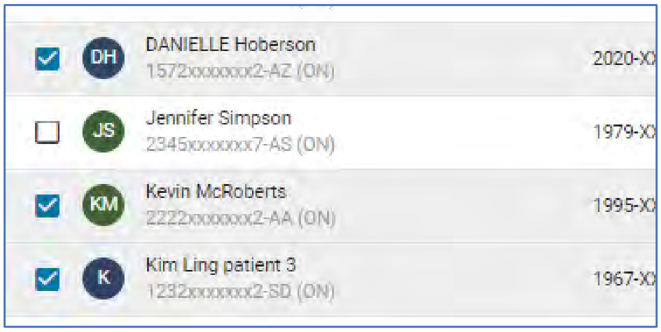
As mentioned above, you can use this directory to select one or more contacts on your Circle of Care listing and send out a SigMail message.

However, there are instances where you are sending messages to the *same group of contacts* on a *regular frequency*. This would be common when communicating to members on the same research project or dealing with committees.

The Circle of Care directory allows you to create **Mailing Lists** to assist you in managing group messages. This allows you to select the group as a *single contact* on your list (rather than individually selecting each member) whenever you need to send them a group message.

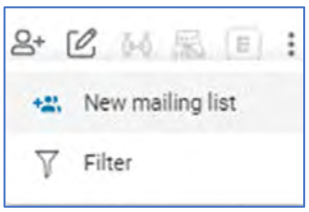
To create a Mailing List:

- Select each of the contacts on the *Circle of Care* directory listing that you want to include in your Mailing List definition. Click each row to highlight and select it.



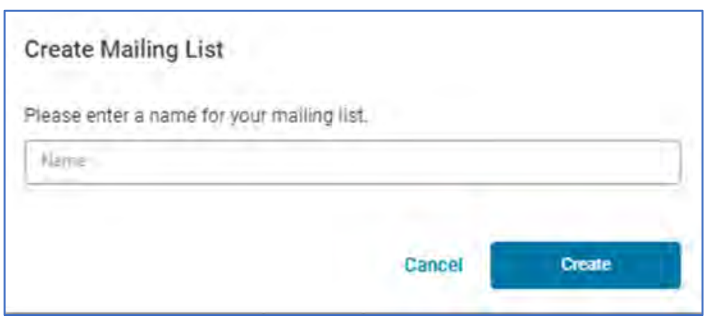
- Click the *menu icon* symbol at the end of the toolbar (located to the left of the Search field at the top-right of the screen

  - This will open a drop-down menu to *additional* toolbar functions.

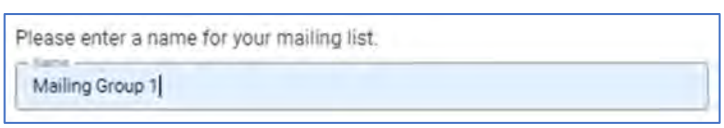


  - Click the *New mailing list* option on this drop-down menu.

- A ***Create Mailing List* pop-up window** will be presented.



- Enter a Mailing List ***Name*** for the group in the provided field.

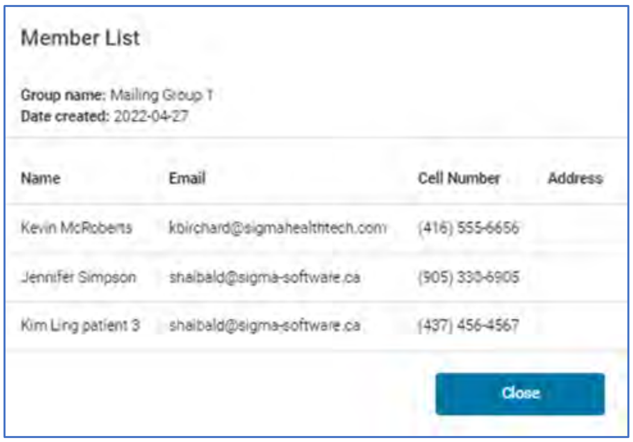


- Click the *Create* button to save your Mailing List definition.

Once your Mailing List is saved:

- The Mailing List will now be added to your Circle of Care directory listing as a single contact name.

- To review the details of the Mailing List, double-click on the row within the directory list.
  - A ***Member List pop-up window*** will display the Mailing list details including a list of the individual members. Click the *Close* button to close the pop-up and return to the directory.



Member List

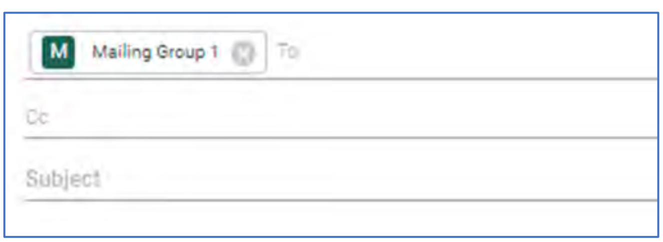
Group name: Mailing Group 1
Date created: 2022-04-27

Name	Email	Cell Number	Address
Kevin McRoberts	kbirchard@sigmahealthtech.com	(416) 555-6656	
Jennifer Simpson	shaibald@sigma-software.ca	(905) 330-6905	
Kim Ling patient 3	shaibald@sigma-software.ca	(437) 456-4567	

Close

- When you select this Mailing List Name on the list to send a message (using the ***New Message icon*** on the toolbar):

  - The draft message created will now be addressed to that group of contacts *as a single **Member List** name. When the message is sent, it will be issued to each Inbox of the individual members of the Mailing List.*



11.4.6 Inviting a patient

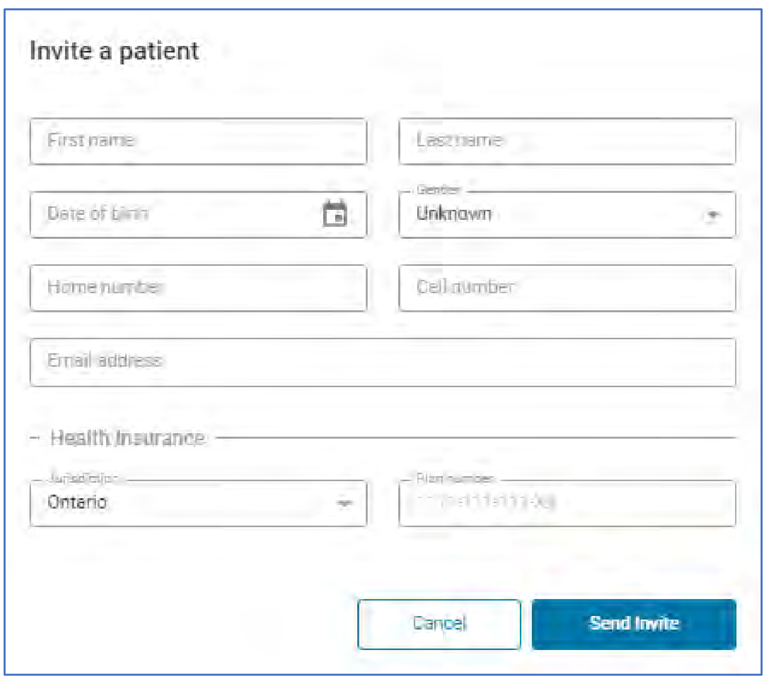
The '*Circle of Care*' directory screen also provides the ability to send a Patient an invitation to register and use their own SigMail Inbox. This will allow the patient to login to their own SigMail Inbox and be able to exchange medical information securely with their Circle of Care physicians.

Once the invitation is sent, the new Patient contact row will then be added to your Circle of Care directory list.

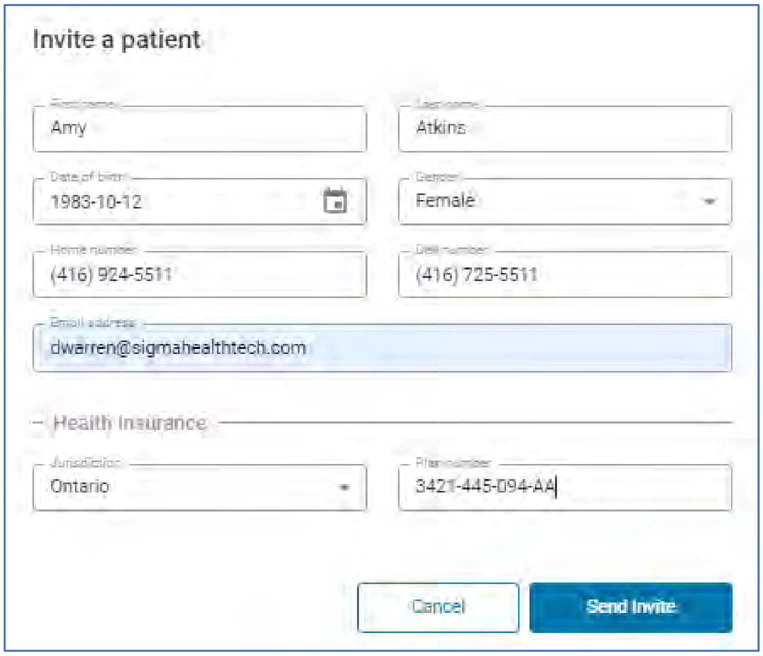
To **invite a Patient** using the *Circle of Care* directory screen:

- Click the ***Invite patient icon*** located on the toolbar in the top-right corner of the window (beside the Search field).

- An 'Invite a patient' pop-up window will be displayed

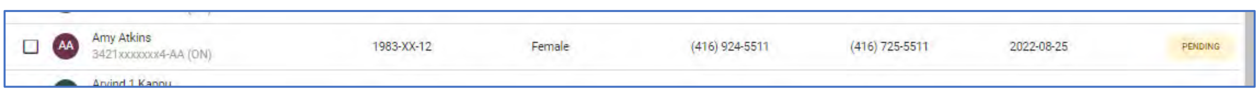


- Complete the *'Invite a patient'* form using the provided fields in the pop-up.

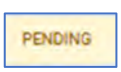


- Click the *Send Invite button* to issue the invitation.

- Once the invitation is sent, a new contact row will be added to your 'Circle of Care' directory listing for this patient.



  - The Status of this contract row will initially be set to '***Pending***'. This indicates the SigMail invitation has been *sent* to the patient and is now awaiting the patient to complete their account registration to activate the account.



NOTE:

This section illustrated how to 'Invite a patient' using the 'Circle of Care' directory window. However, there are other methods to initiate a Patient Invite.

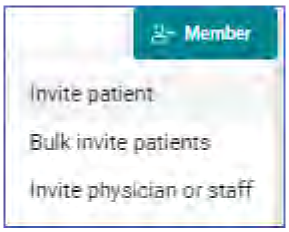
Using ANY SigMail screen:

An alternate way to directly access this 'Invite a patient' pop-up window is to **click the *Invite Patient* link found on the toolbar at the top of the SigMail Account window**. This toolbar & quick link are available from *any* SigMail screen.

*Please refer to **Chapter 12 ('Adding a Patient (Guest) to Sigmail')** for these details.*

<u>**Using 'Manage Members' screen:**</u>

Another method of accessing the 'Invite a patient' pop-up window is ***using the 'Create Member' button on the 'Manage Members' screen and clicking the 'Invite patient' option***.



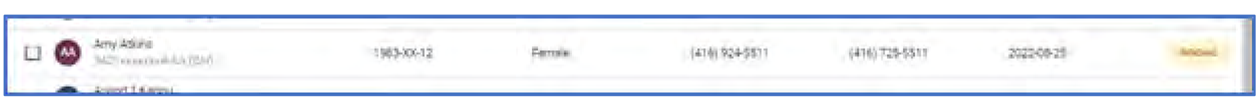
*Please refer to **Section 15.1 ('Invite a Patient (Single Invite)')** for these details.*

Regardless of which method is used to initiate the 'Invite a patient' pop-up window, the steps to complete and send the invitation are the same (and will result in a new contact row being added for the patient on your Circle of Care directory listing).

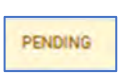
11.4.7 Managing Patient Invitations

The 'Circle of Care' directory screen also provides the ability to monitor and manage your sent Patient invitations to register and use their own SigMail Inbox.

- As mentioned above, when the Patient Invitation is sent, a new contact row will be added to your 'Circle of Care' directory listing for this patient.

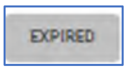


- The status of the row will initially be '**Pending**' (as shown in the 'Status column).



- Once the patient has completed the Registation steps to active their SigMail account, the Status will become '**Active'**:

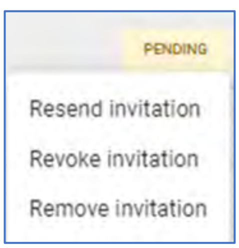
- However, if the Patient fails to complete the Registration process after 30 days, the status of the invitation row will automatically change to '**Expired**'.



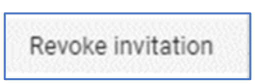
Revoking a Patient Invitation

In some cases, there may be a need to Recall (or 'Revoke') the Patient invitation.

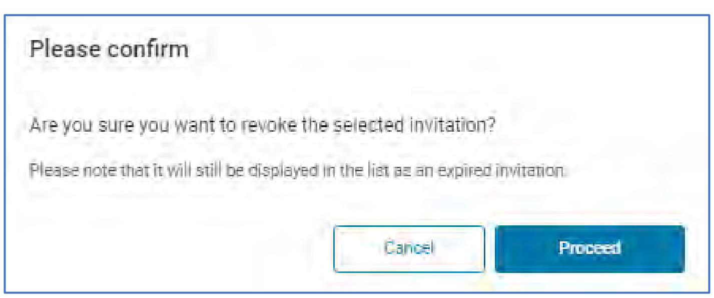
- *To Revoke the invitation:*
  - Click the Status button on the row to open a drop-down menu.



  - Select the 'Revoke invitation' option on the drop down menu.

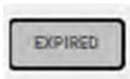


  - A Confirmation pop-up window will be presented.



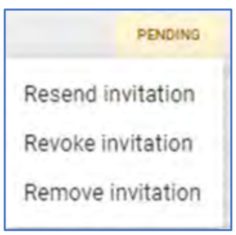
- Click the 'Proceed' button within the pop-up.

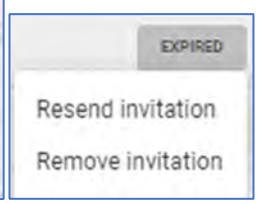
- The invitation will then be revoked; the Status of the contact row will change to Expired.



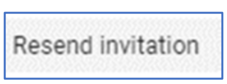
Resending a Patient Invitation

- In some cases, there may be a need to Resend the Patient invitation. This need may arise when the invitation is still *Pending* (but the patient never received the invitation message (or deleted in error). Alternative, the original invitation may have lapsed (*Expired).*
- *To Resend the invitation:*
    - Click the Status button associated with the Circle of Care row (regardless of whether that row is Pending or Expired) to open a drop-down menu.

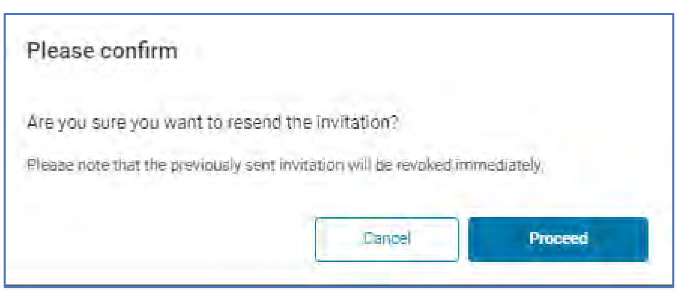




    - Select the 'Resend invitation' option on the drop-down menu.



    - A Confirmation pop-up window will be presented.



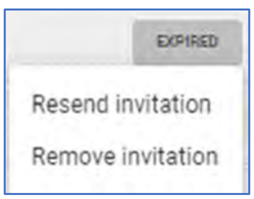
    - Click the 'Proceed' button within the pop-up.

- The invitation will then be resent. The previous contact row will be removed and replaced.
- The new row will have a status ‘Pending’. (You will also notice the status date (shown in the ‘Registered’ column) is the current date for this new/resent invite).

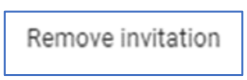
Removing a Patient Invitation

At some point you may wish to ‘clean up’ your Circle of Care directory to show only your latest set of patients and delete any old/expired invitations.

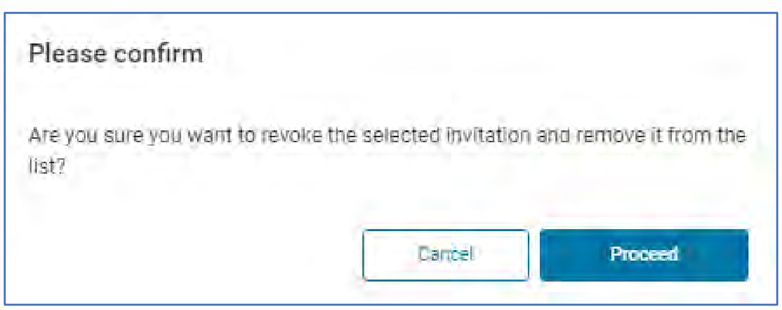
- *To Remove an invitation:*
  - Click the Status button associated with the Circle of Care row (to open a drop-down menu).



  - Select the ‘Remove invitation’ option on the drop-down menu.



  - A Confirmation pop-up window will be presented.



  - Click the ‘Proceed’ button within the pop-up.

  - The invitation will then be removed and will no longer appear on your Circle of Care directory list.

11.4.8 Send to HRM

As mentioned above, you can use this directory to Send a select one or more contacts on your Circle of Care listing and send out a SigMail message.

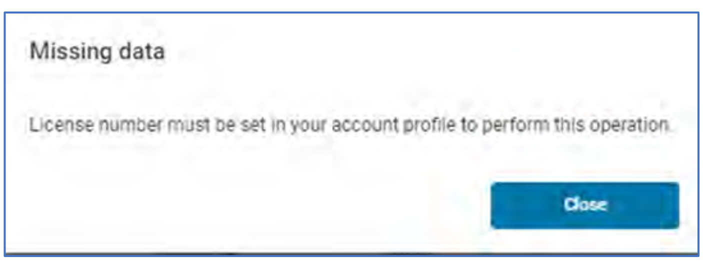
The Circle of Care directory can also be used to send a message about a patient to another physician via HRM.

- Select the Patient on the Circle of Care directory listing.
    - Click on the checkbox of the row to select it.

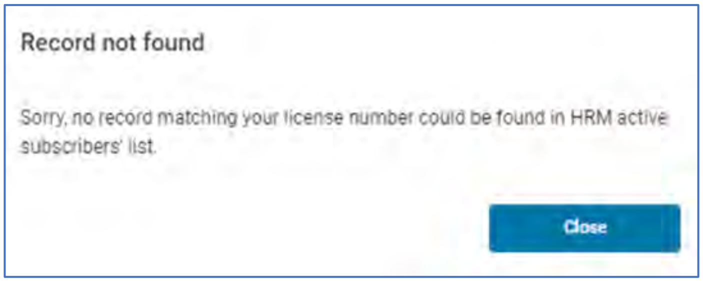
    - Click the ***Send to HRM icon*** located on the toolbar in the top-right corner of the window (beside the Search field).

NOTE:

To perform a Send to HRM request, a License number must be specified on your SigMail account profile, and you need to complete the HRM onboarding. Please contact support for this.



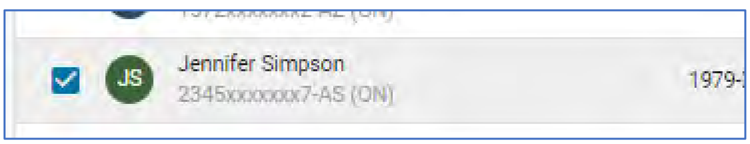
In addition, that License Number must also be an active (on the HMR subscriber list).



11.4.9 Sending an E-Consult

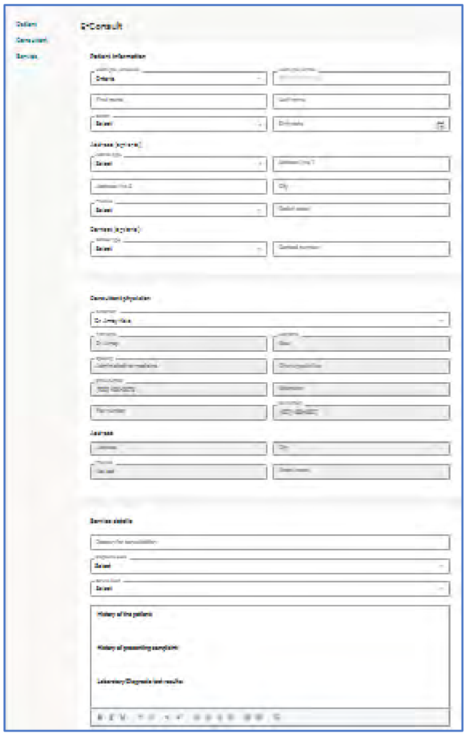
The Circle of Care directory list can also be used to send an E-Consult about a patient to another physician.

To **create an E-Consult** using the *Circle of Care* directory screen:



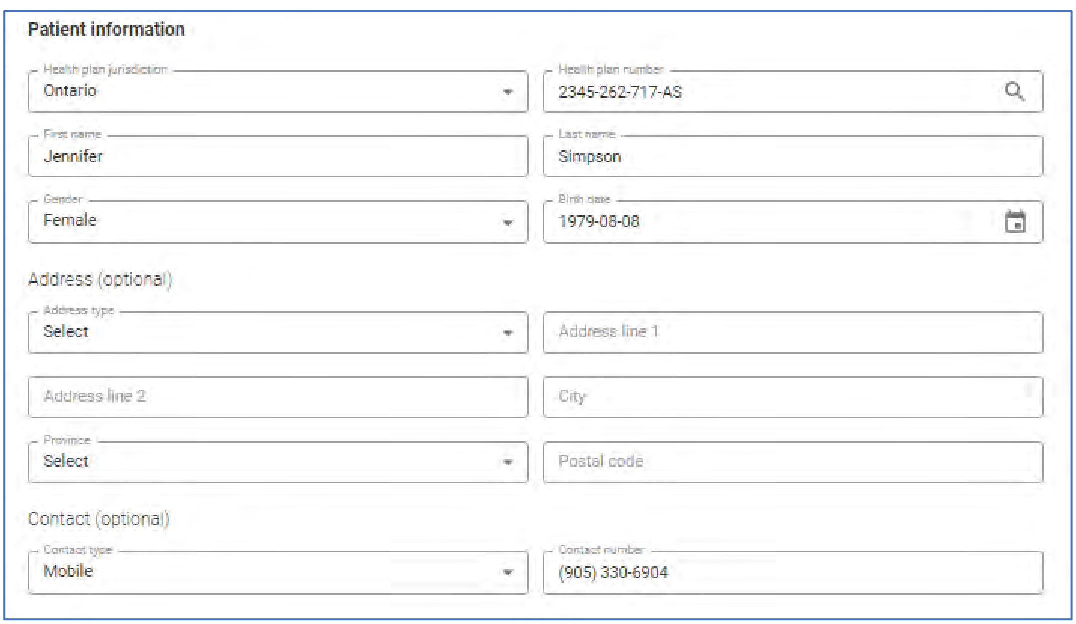
- Click the ***New E-Consult icon*** located on the toolbar in the top-right corner of the window (beside the Search field).

- The right-hand side window will then display the same draft E-Consult form.



The form has *three sections* to complete.

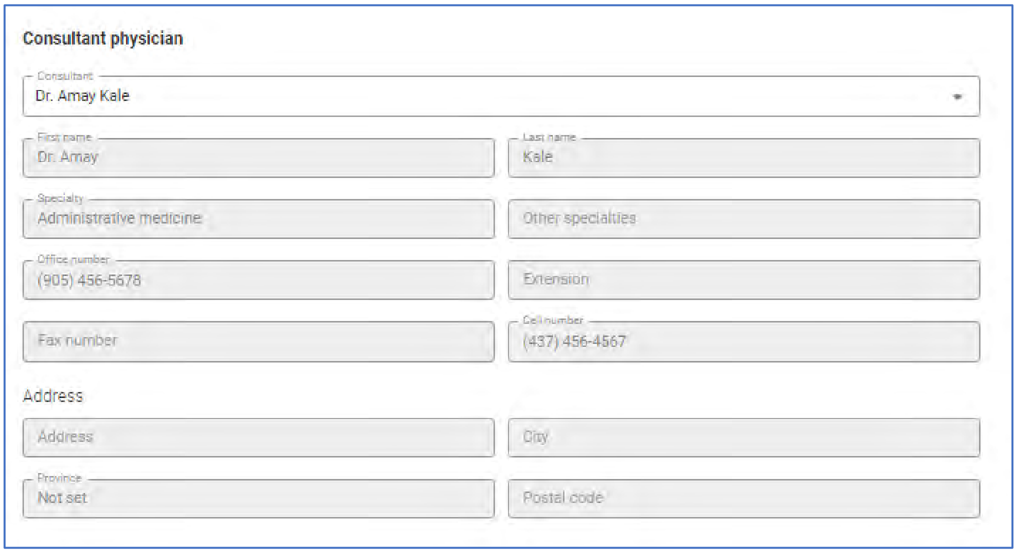
- Review and complete the ***Patient Information*** section:



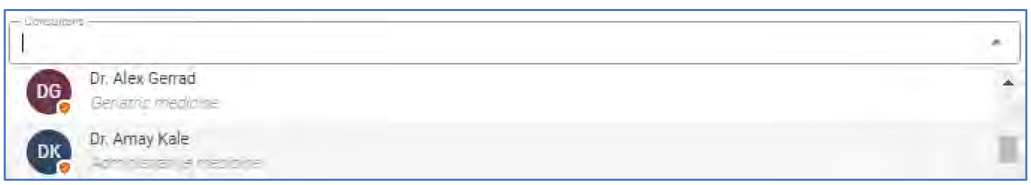
  - This section will be pre-populated with the Patient details (as retrieved from their SigMail account profile.)

- Enter any missing information as needed.

▪ Complete the ***Consultant physician*** section:

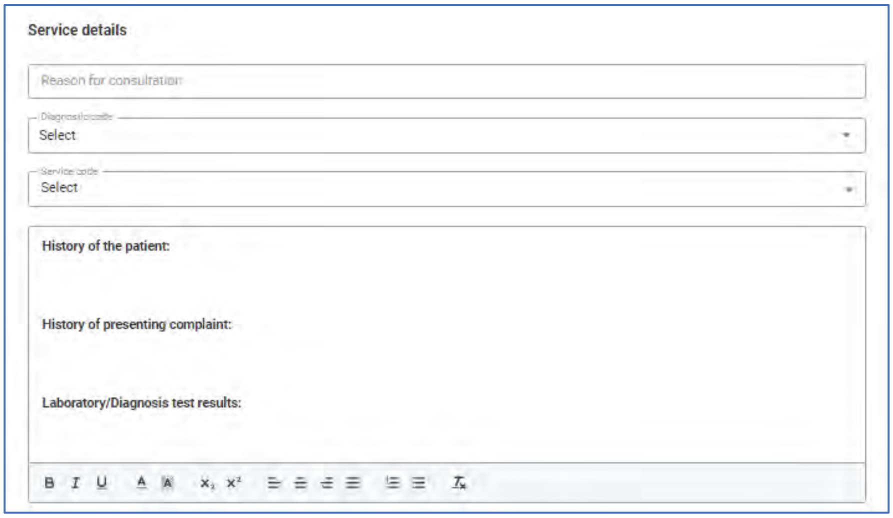


- Click on the ***Consultant*** field to open a drop-down of the Physician contacts. Select the physician from the list who is to receive this E-Consult.

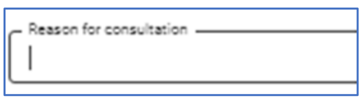


- Once a *Consultant* is selected., the remaining fields in this section display the details associated with the select physician (as retrieved from that physician's SigMail account profile).
  - *These fields are displayed for information only; they are non-editable.*

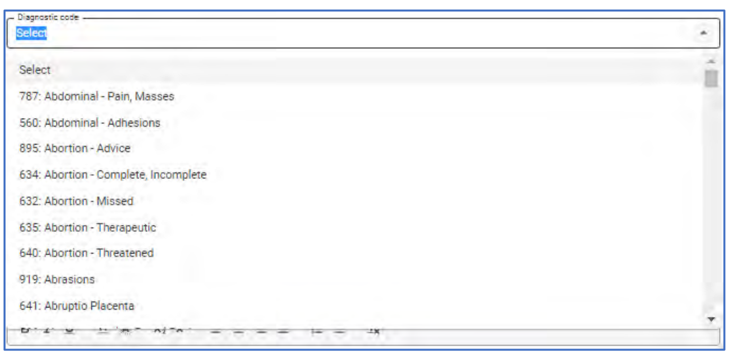
▪ Complete the ***Service details*** section:



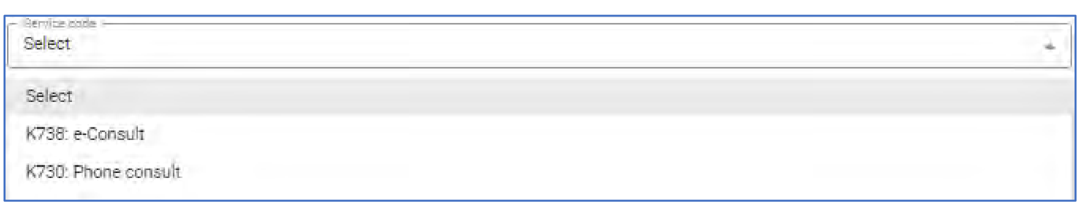
- Enter a ***Reason for consultation***.
  - *Click on the field. The field will be enabled for text entry. Type a brief description for the requested E-Consult.*



- Select a ***Diagnostic code***.
  - *Click on the field. A drop-down list of the available Diagnostic code values will be displayed.*



  - *Click on the appropriate Diagnostic code value on the drop-down. The drop-down will close and the selected value will be populated.*
- Select a ***Service code***.
  - *Click on the field. A drop-down list of the available Service code values will be displayed.* SigMail will do the OHIP billing for the e-Consult.

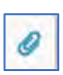


- Complete the remaining background detail for the patient in the textbox provided:

- Enter a brief text description for ***History of the patient*** under the provided heading.
- Enter a brief text description for ***History of the presenting*** complaint under the provided heading.
- Enter a brief text description for ***Laboratory/Diagnosis test results*** under the provided heading.

> **NOTE***:*
>
> A formatting toolbar is provided at the bottom of the textbox to assist you in formatting the text in this area.
>
> 

- To **attach documents** to your E-Consult:
  - *Click on the 'Attach documents' button at the bottom of the E-Consult form (located beside the 'Send' button).*

  - *This will open a pop-up window of your computer's file folders (for you to select the document(s) you wish to attach).*

- To **Send** the E-Consult:
  - Click the '***Send***' button to issue the E-Consult (and return to the 'Circle of Care' Contact listing.)

NOTE

When initiating the E-Consult from the Circle of Care directory, you will first select a patient (and these details will be pre-populated on the E-Consult form). You then need to select the Consultant Physician and complete the Service Details sections of the form.

A New E-Consult can also be initiated from the ‘Physician’ Contact list.

With that process, you will first select the Physician (and these details will be prepopulated on the E-Consult form). You then need to enter the Patient information and Service Details sections.

Please refer to Section 11.1.3 (Sending an E-Consult from the ‘Physician’ Contact List) for full details.

12 Adding a Patient (Guest) to SigMail

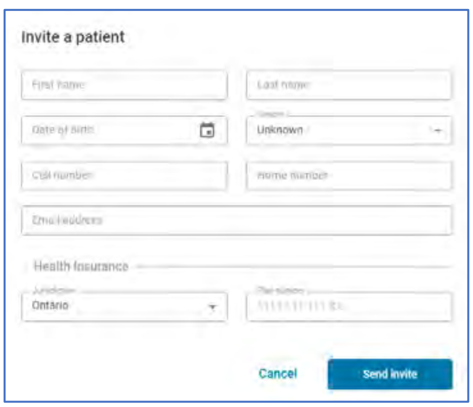
A Patient can be added to the SigMail system to provide them with their own guest account. This will allow the patient to login to their own SigMail Inbox and be able to exchange medical information securely with their Circle of Care physicians and their medical clinics.

The **Invite Patient** link is found on the toolbar at the top of the SigMail Account window.

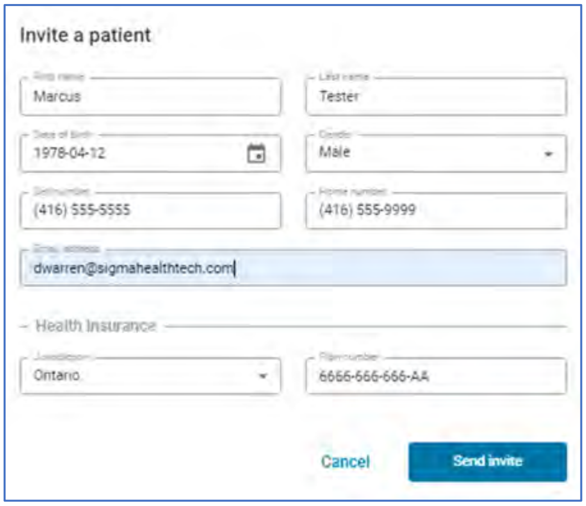
<u>To ***Invite a Patient***:</u>

- Click the *Invite Patient* link located on the toolbar.

- A 'Invite a patient' pop-up window will be presented.

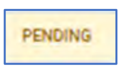


- Complete the 'Invite a patient' form using the provided fields in the pop-up.



- Click the *Send Invite button* to issue the invitation.

- Once the invitation is sent, a new contact row will be added to your '***Circle of Care***' directory listing for this patient.
  - The Status of this contract row will initially be set to '***Pending***'. This indicates the SigMail invitation has been ***sent*** to the patient and is now awaiting the patient to complete their account registration to activate the account.



- The invitation message will then be automatically issued by SigMail to the Patient's email address (as provided in the invitation pop-up form).

- The Patient will then need click the 'Register Now' button within this email to complete the registration process to activate their SigMail guest account.

- The Invitation Status will remain 'Pending' until the Patient completes the Registration instructions that were emailed to them. Once the patient has completed the registration steps to activate their SigMail guest account, the Invitation Status on the Circle of Care row will change to show an 'Active' status.

13 Account Settings and General Info

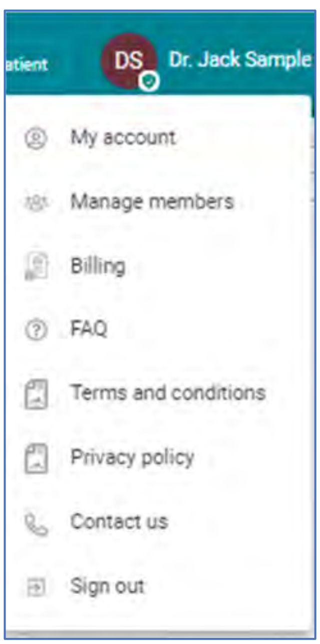
The **Account Settings tab** is found at the end of the toolbar at the top of the SigMail Account window. This tab is labelled as your **Account Name.**

The ***Account Settings*** tab allows you to:

- edit your ***account profile*** information
- ***Manage Members***
- access ***general system information***
- ***Sign Out*** of your account

To open the Account Settings menu, **click on the link** (your Name).

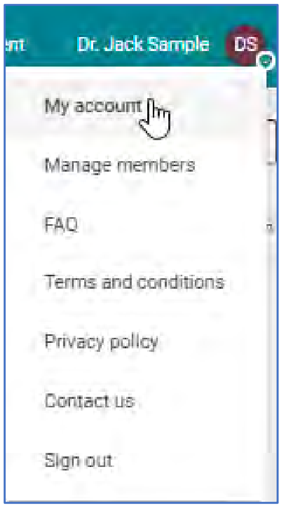
A drop-down menu will open displaying the available Account Setting options.



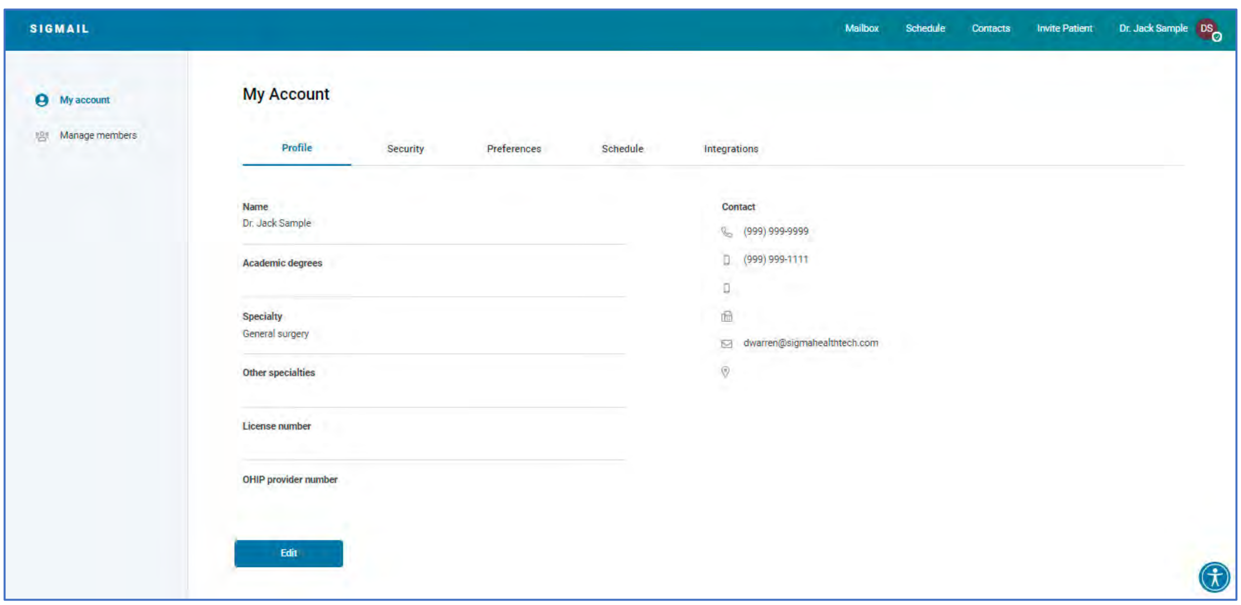
13.1 Managing your Account Settings ('My Account')

To view and maintain settings specific to your own SigMail account:

- Click on the **'My account'** option on the menu list.

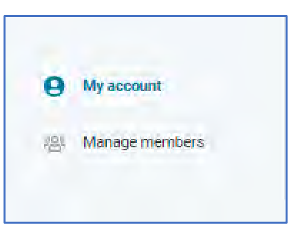


- The main SigMail account window will now display the **'My account' window**.

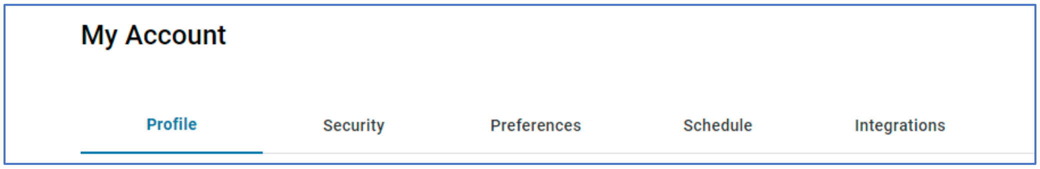


You will notice on the left-hand side of the window, there are 2 pages available on this screen: a '**My account**' page and a '**Manage members'** page.

Upon initial display of the screen, the '**My account**' page will display by default.

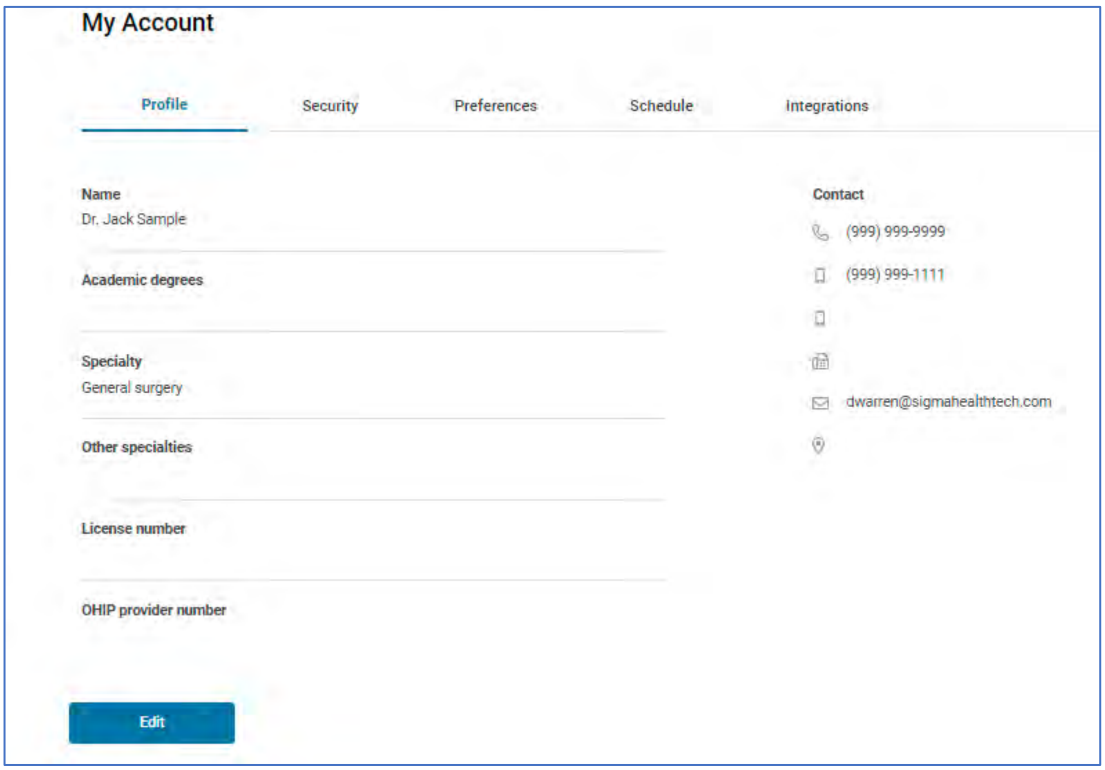


The '**My account**' page is composed of several tab pages, as shown on the toolbar at the top of the page. You will initially land on the '***Profile***' tab of this screen.



13.1.1 'Profile' Information

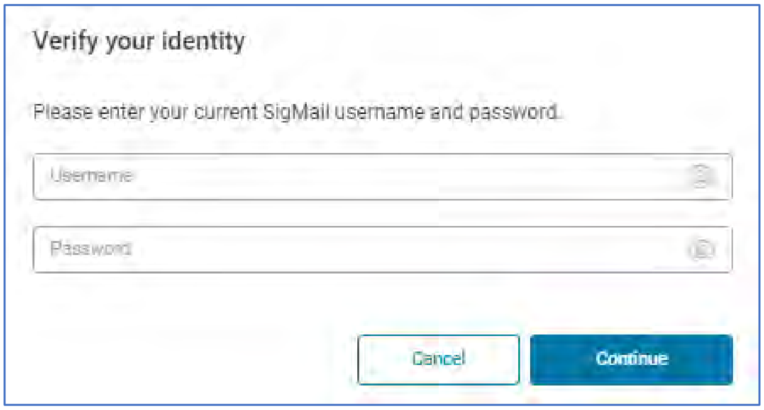
The '***Profile***' tab will display the Profile information associated with your SigMail account. Values displayed on this screen are protected (view only).



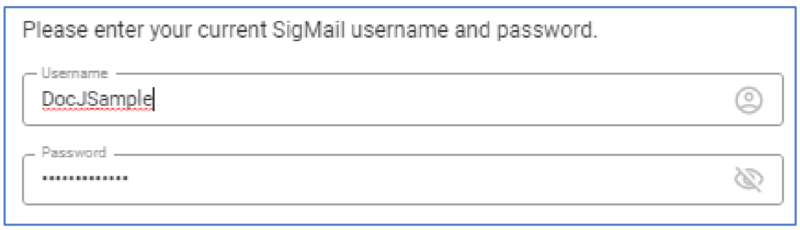
To modify your 'Profile' information:

- Click on the '**Edit**' button on the bottom of the screen.

- A pop-up window will be presented requiring you to verify your identity.

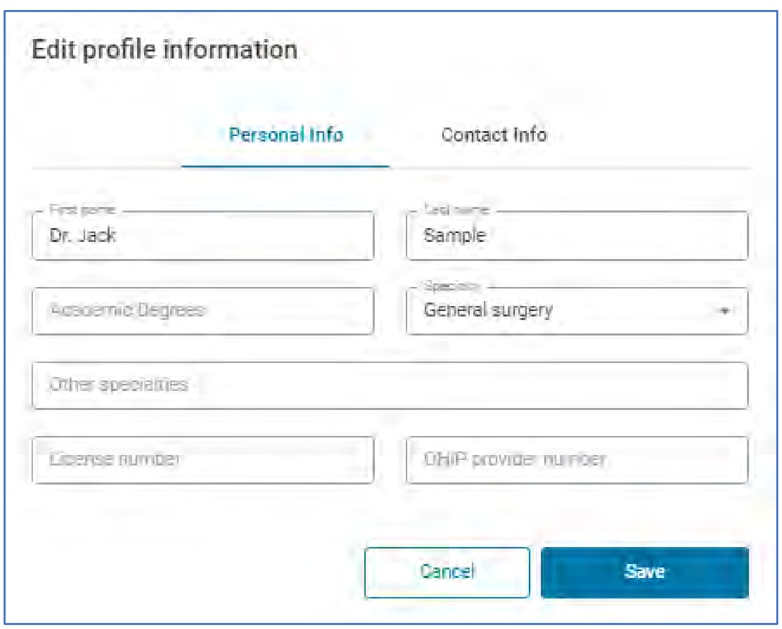


- Enter the ‘Username’ and ‘Password’ credentials associated with your SigMail account in the provided fields.

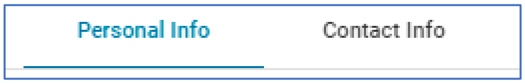


- Click the ‘Continue’ button to proceed.

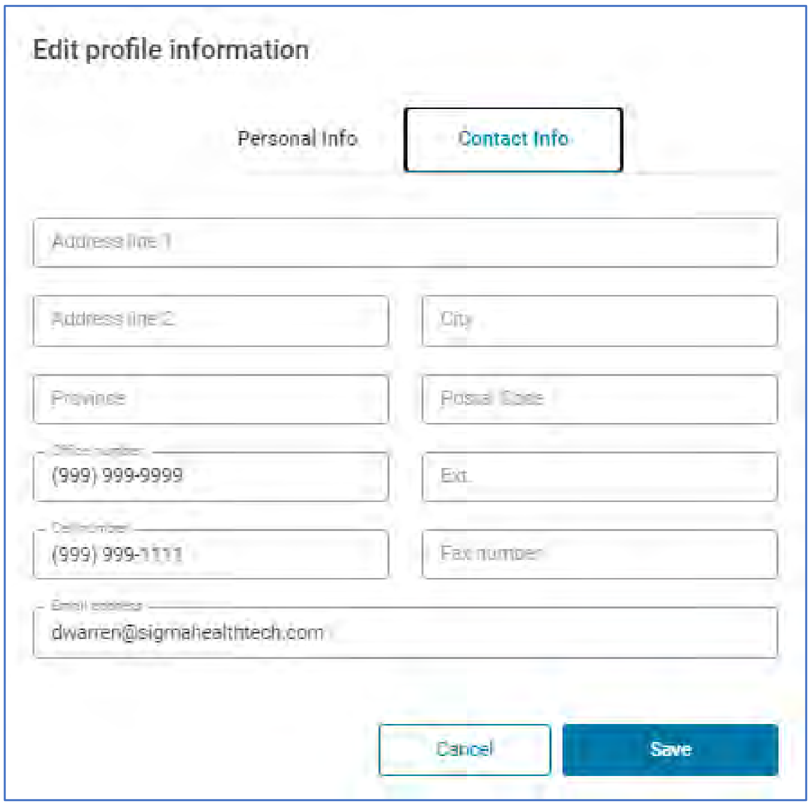
- The system will validate your credentials. If successfully matched, a pop-up ‘**Edit Profile information’ window** will be presented allowing you to modify your Profile information.



- You will notice that the pop-up '**Edit Profile information**' window consists of two tab pages: '***Personal info***' and '***Contact info***'.
- You will initially be presented with the '***Personal info***' page.



- Once you have made only necessary changes to the '***Personal info***' tab, click on the '***Contact info***' tab to review (and update) that second tab.



- To save the modifications to your Profile information, click the '**Save**' button at the bottom of the pop-up window.

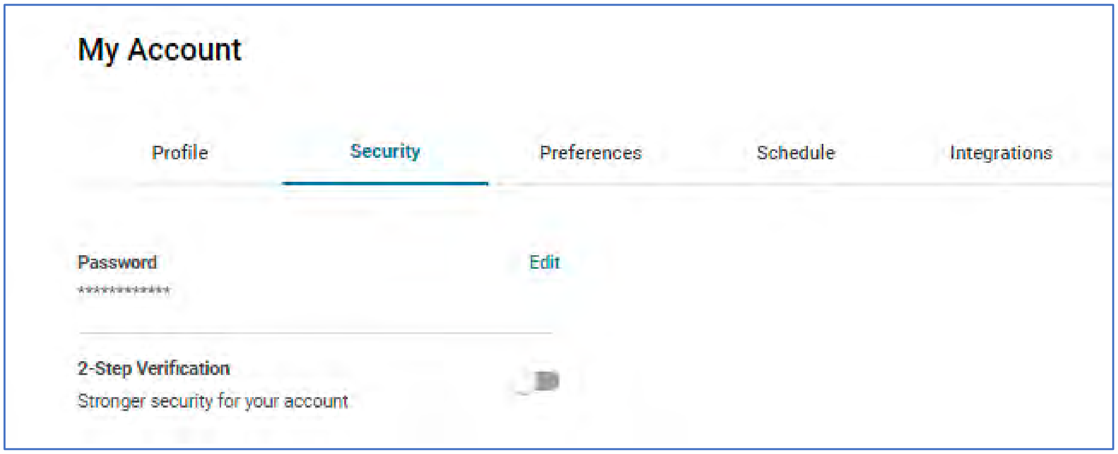
- The '**Edit profile information**' pop-up window will close, returning you to the '***Profile***' tab of the '**My account**' window. The 'Profile' tab should now reflect the updated details.

13.1.2 'Security' Settings (Password Change and 2-Step Verification)

To view the '***Security***' tab of the 'My account' page, click on the associated tab at the top of the page.

This tab will allow you to:

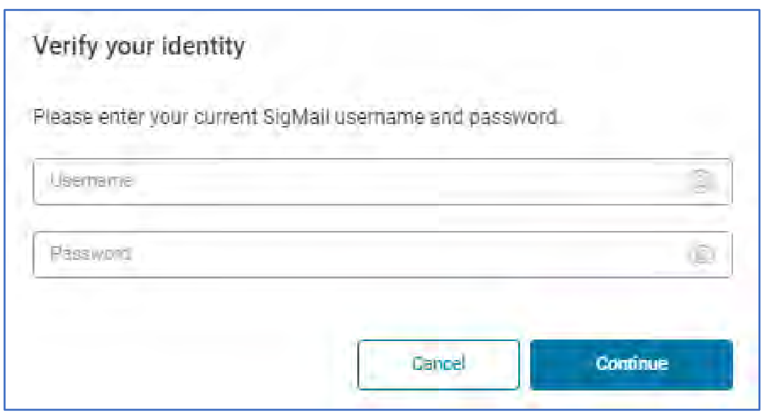
- change your account ***Password***
- enable ***2-Step Verification*** to further protect your SigMail account access.



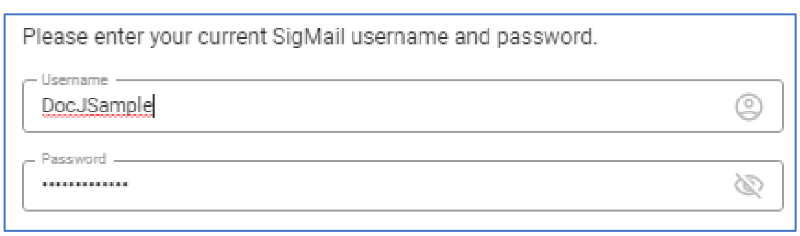
To modify your 'Password':

- Click on the '**Edit**' button provided for this field.

- A pop-up window will be presented requiring you to verify your identity.

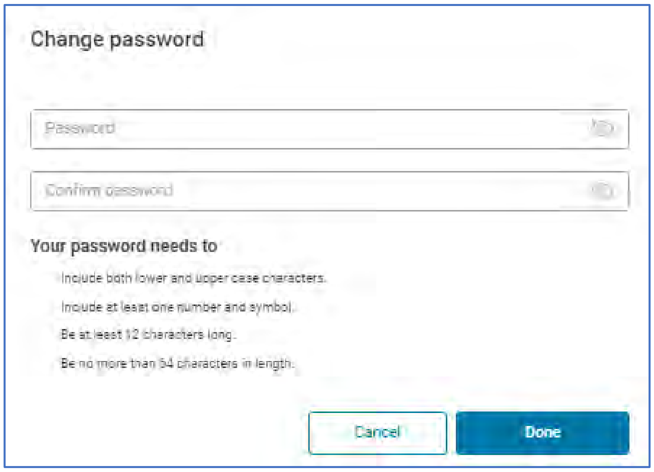


- Enter the 'Username' and 'Password' credentials associated with your SigMail account in the provided fields.



- Click the '**Continue**' button to proceed.

- The system will validate your credentials. If successfully matched, a pop-up '***Change Password***' window will be presented allowing you to modify your Password

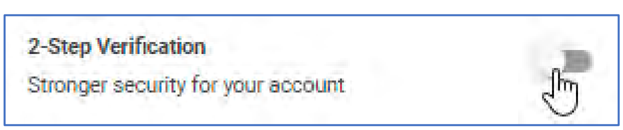


- On the '***Change password***' pop-up:
  - **Password:** Enter a new/replacement password for your SigMail account
  - **Confirm password**: Re-enter the new password value in this field to confirm the value
  - Click the **'Done'** button.

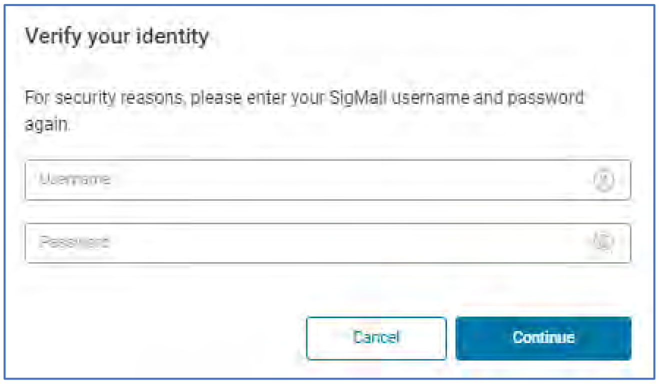
- Your revised password will be saved and the '***Change password***' pop-up window will close, returning you to the '***Security***' tab of the '***My account***' window.

To enable '2-Step Verification':

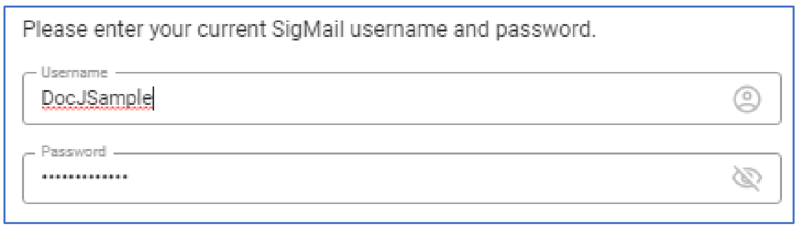
- Click on the slide-bar provided for this field.



- A pop-up window will be presented requiring you to verify your identity.

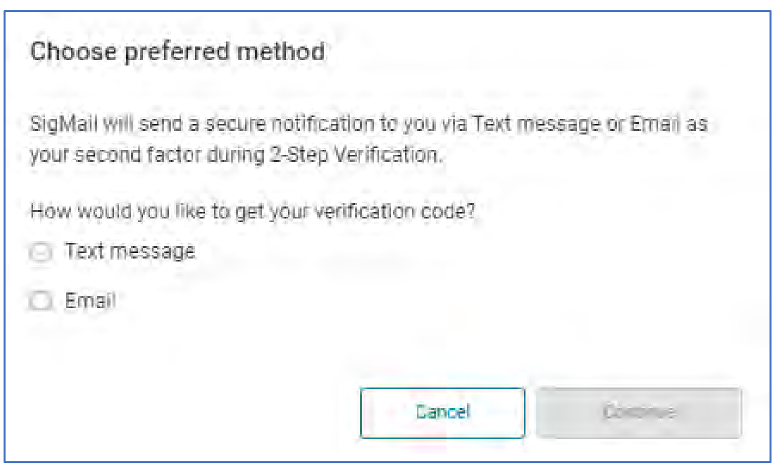


- Enter the ‘Username’ and ‘Password’ credentials associated with your SigMail account in the provided fields.

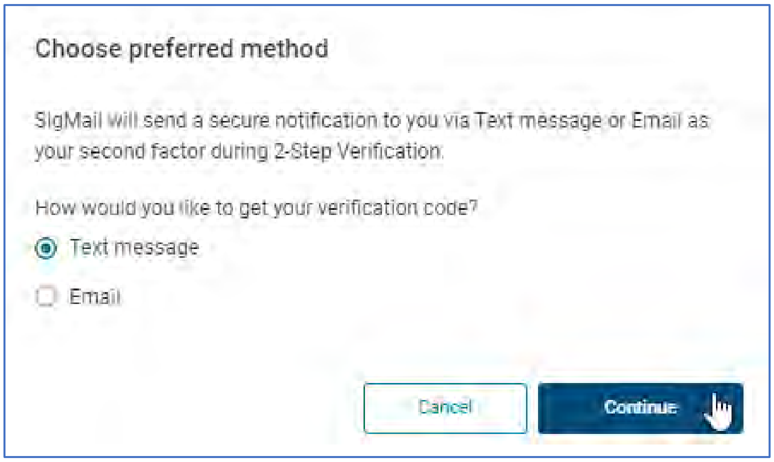


- Click the ‘Continue’ button to proceed.

- The system will validate your credentials. If successfully matched, a pop-up ‘**Choose preferred method’ pop-up window** will be presented allowing you to define the 2-Step Validation method for accessing your SigMail account.



- Select either ‘***Text message***’ or ‘***Email***’ as the method for receiving your second-level validation method.
- Click the ‘***Continue***’ button to proceed.



- A '***Enter verification code***' pop-up window will then be presented.

- Depending on the option chosen, a verification code will be automatically sent by the system as *either* a text message (to the Cell Number associated with your SigMail profile) *or* by email (to the Email address associated with your SigMail account profile).
- Check your text messages or email account to retrieve this verification code.

- Enter the Verification Code value you received in the provided field on the pop-up.
- Click the '***Done***' button to proceed.

- If the Verification Code enter is successfully entered and matched:
  - The 2-Step Verification Method will be enabled on your SigMail account.
  - The '***Enter verification code***' pop-up window will be closed returning you '***Security***' tab of the '***My account***' window.
  - You will notice that the slide-bar associated with the '**2-step verification**' field on the tab will now be changed to indicate that the option is now activated.

NOTE:

While the '2-step verification is activated on your account, you will automatically receive either a text or email with a new Verification Code *each time* you log into your SigMail account.

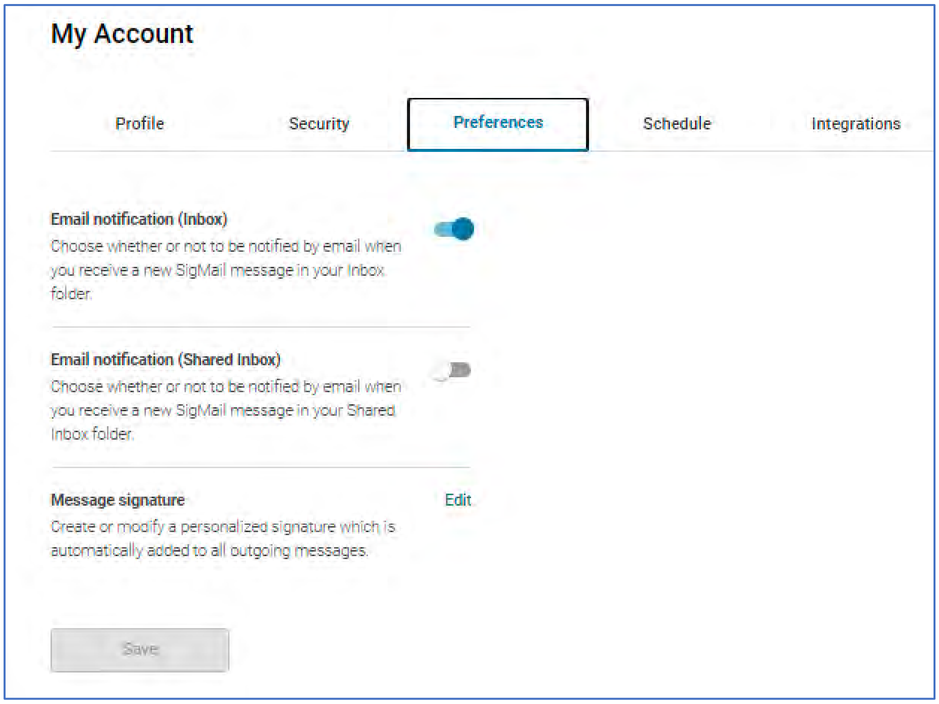
After entering your Username and Password, you will be presented with the 'Enter verification code' pop-up window and required to enter the Verfication Code before being able to gain access to your account.

13.1.3 'Preferences' (Notification Settings and Signature)

To view the '***Preferences***' tab of the 'My account' page, click on the associated tab at the top of the page.

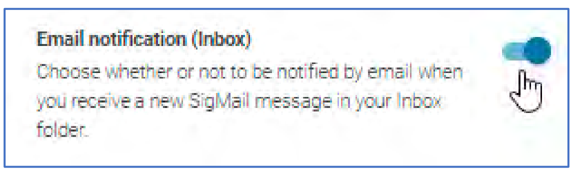
This tab will allow you to manage the options on your SigMail account to:

- enable ***Email notification*** for your ***Personal Inbox***
- enable ***Email notification*** for your ***Shared Inbox***
- create/edit the ***Signature*** message for your outgoing SigMail messages



To enable 'Email notification (Inbox)':

- Click on the slide-bar provided for this field.

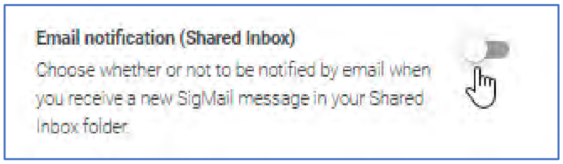


- If this option is enabled, an email will be sent (to the Email address associated with your SigMail account profile) to ***notify you whenever a new SigMail message have been received in your personal 'Inbox'.***
- When your SigMail account is initially activated, this option will be enabled by default.

- You can disable this option if you no longer wish to receive these notifications. Use the slide-bar to toggle the indicator off (or on).

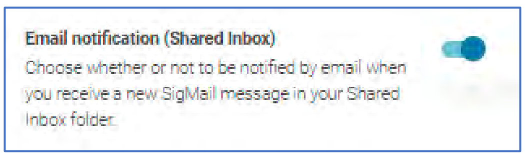
To enable 'Email notification (Shared Inbox)':

- Click on the slide-bar provided for this field.



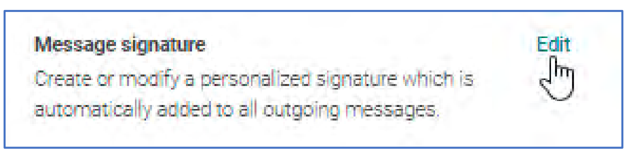
- If this option is enabled, an email will be sent (to the Email address associated with your SigMail account profile) to ***notify you whenever a new SigMail message have been received in your 'Shared Inbox'.***
- When your SigMail account is initially activated, this option will be disabled by default.

- You can enable this option if you wish to start receiving these notifications. Use the slide-bar to toggle the indicator on (or off).

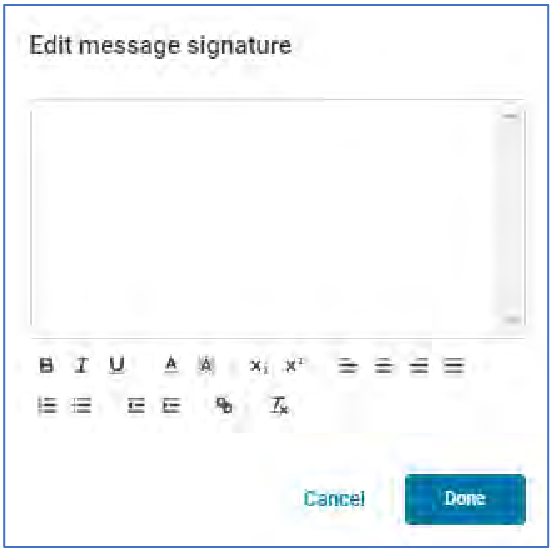


To create and edit the 'Message signature':

- Click on the '**Edit**' button provided for this field.



- An ***'Edit message signature' pop-up window*** will be presented for you to input/change the Signature message for your outgoing SigMail messages.



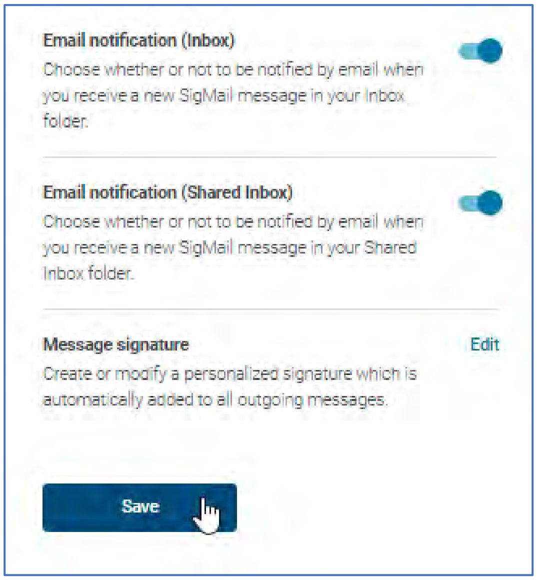
- Use the provided textbox within the pop-up to enter the details of your Signature message.
- **The message is used to record the details you typically use when signing off a message.** *Details typically include your full name and title, department and phone number with extension.*
- The message should be formatted exactly as you wish it to appear. A toolbar is provided below the textbox for you to properly format your text (with bold, italics, underline, bullets and indentation options).
- When you have completed editing your Signature, click the '***Done***' button at the bottom of the pop-up window.

- The pop-up window will close, returning you to the ***Preferences tab*** window.

The Signature message will then be *automatically* included in every New Message you create using your SigMail mailbox (rather than having to manually type it).

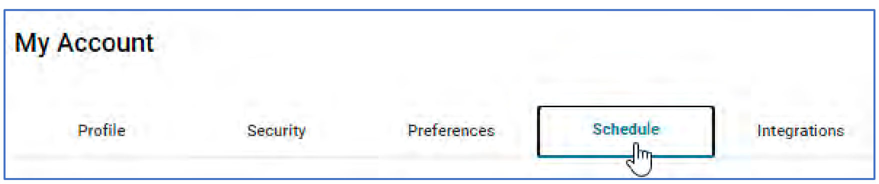
<u>**IMPORTANT:**</u>

- After making any changes to the '**Preferences**' tab options (or associated Signature pop-up content), you must save your work.
- Click the '***Save***' button provided at the bottom of the tab screen.



13.1.4 Workweek 'Schedule'

To view the '***Schedule***' tab of the 'My account' page, click on the associated tab at the top of the page.



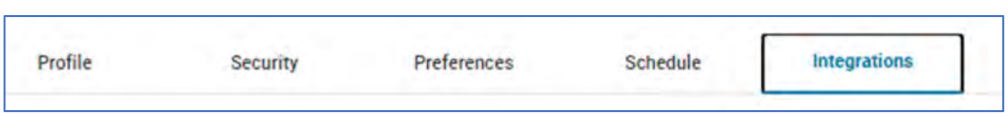
This tab will allow you:

- Enter your work hours for each individual weekday by calendar week.

*(For full details regarding this tab, **refer to the chapter entitled "Adding your 'Work Schedule' to SigMail Calendars"** in this guide.)*

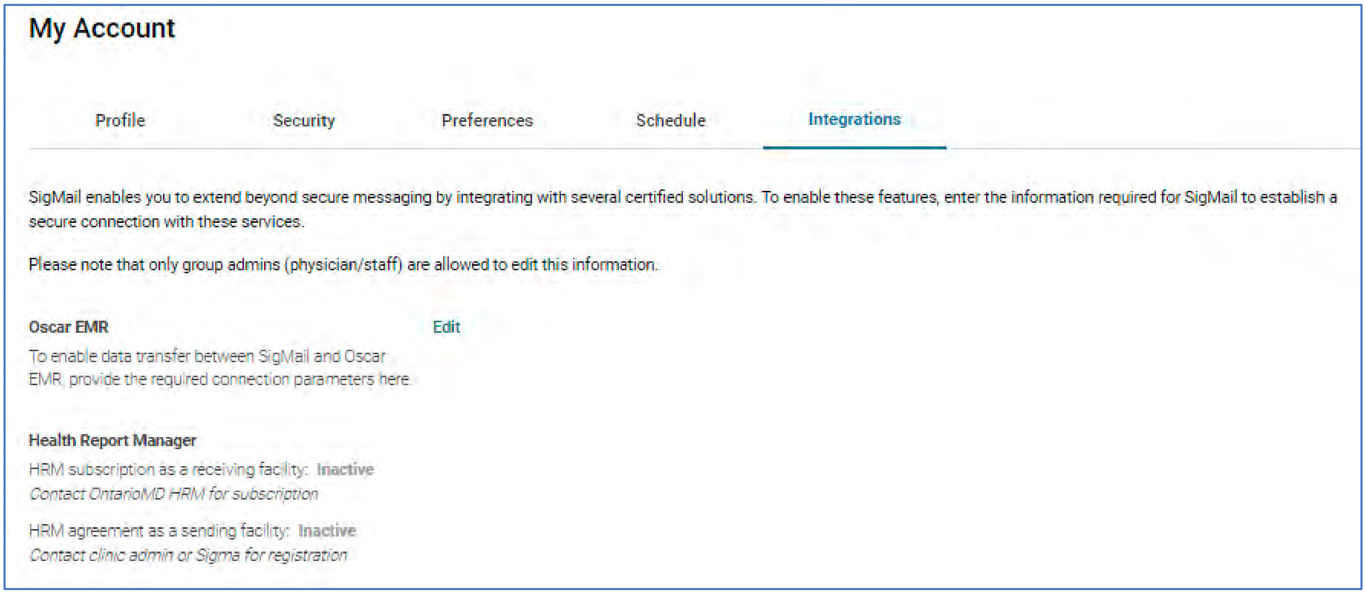
13.1.5 'Integrations' tab

To view the '***Integrations***' tab of the 'My account' page, click on the associated tab at the top of the page.



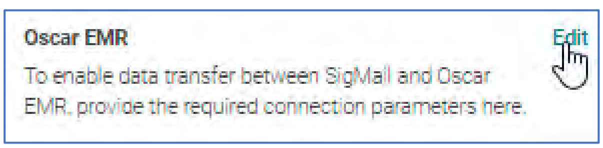
The Integrations tab allows one to:

- Configure the connection details for your SigMail account to transfer data electronically with ***Oscar EMR***
- View the Status of ***Health Report Manager*** integration.

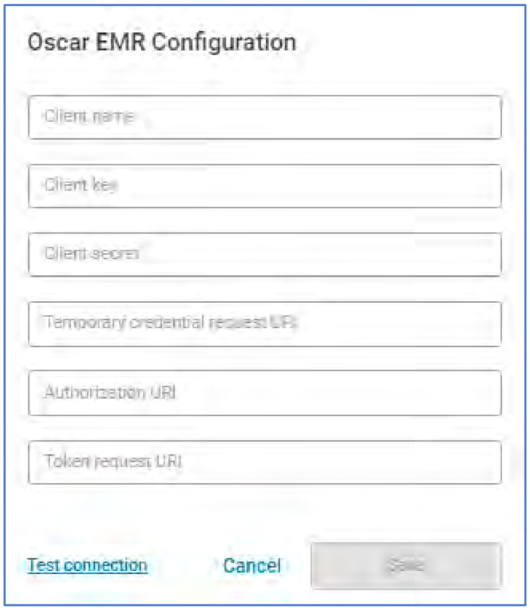


To configure the connection parameters for Oscar EMR:

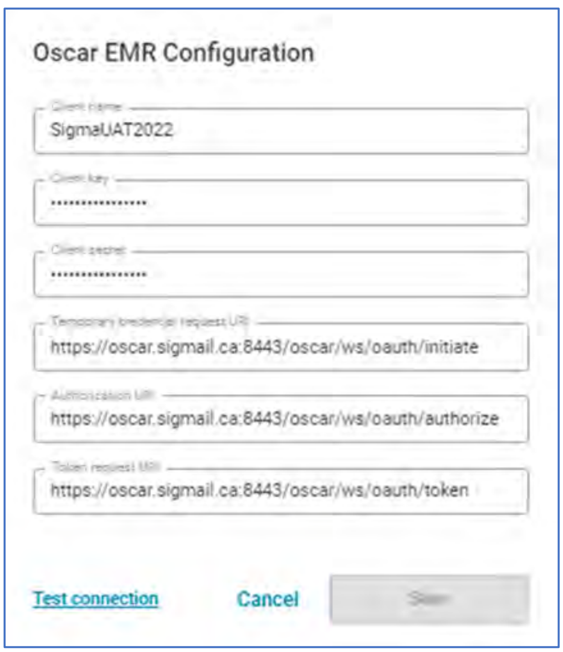
- Click on the Edit button provided for this item.



- A pop-up window will be presented requiring you to complete the Configuration parameters.



- Complete the fields on the pop-up window.

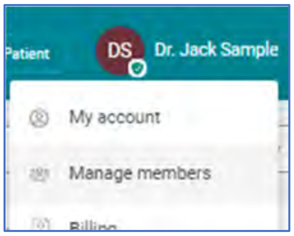


> NOTE:
>
> SigMail Technical Support can assist with the configuration and testing of your Oscar EMR connection.

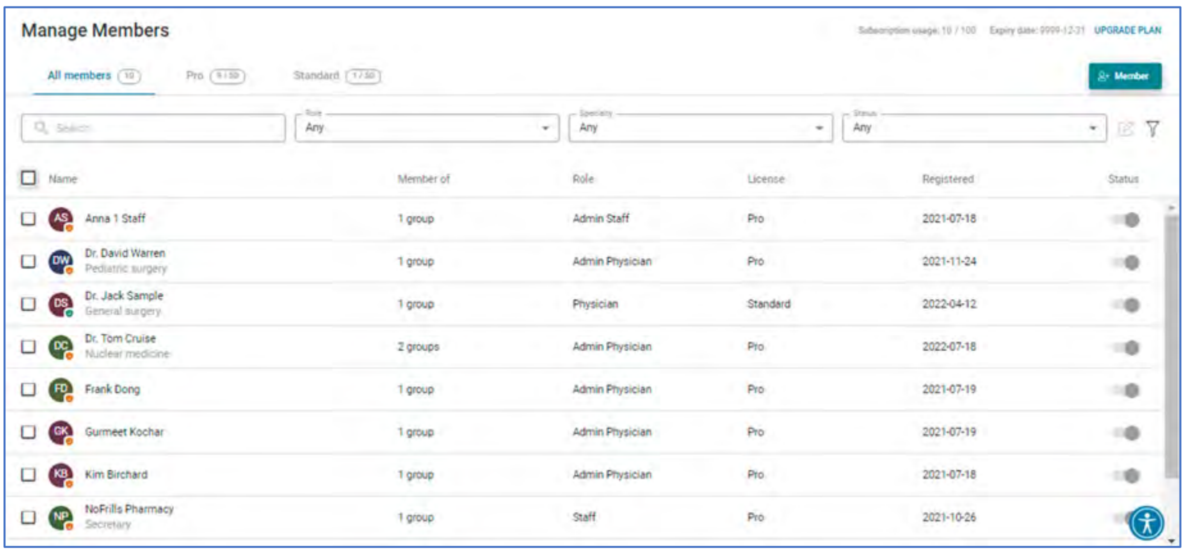
- Click the ‘Save’ button. The pop-up window will close, returning you to the ‘My Account’ window.

13.2 Manage Members

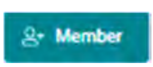
The ‘**Manage Members’ screen** is accessed by selecting the option on the Account Settings menu.



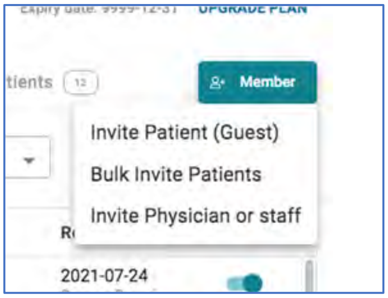
This screen provides a listing of all your SigMail Members. Each row includes a status of the member invitation.



The ***Create Members*** button on this screen allows you to access menu options to:



- ***Invite Patients*** – to invite a single patient to register and use a Guest Account
- ***Bulk Invite Patients*** – to invite a group of patients to register and use a Guest Account
- ***Invite Physician or staff*** – to invite a physician of clinic administrator to register and use a SigMail Account



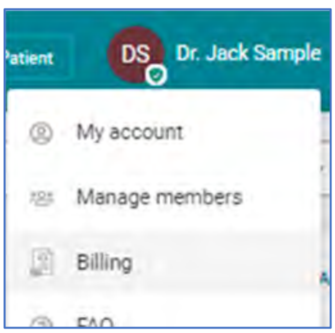
The Manage Members screen allows you to ***monitor the status of member Invitations*** and **Resend**, **Revoke** or **Remove** the invitations as necessary.

*For full details regarding this tab, **refer to the Chapter 15 ('Managing your SigMail Members')** in this guide.*

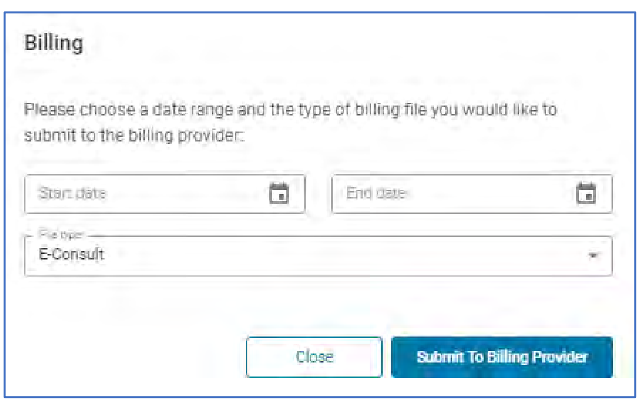
13.3 Billing

To submit a billing file to your Billing Provider:

- Click on the '***Billing***' option on the menu list.



- A '***Billing***' pop-up window will be presents.

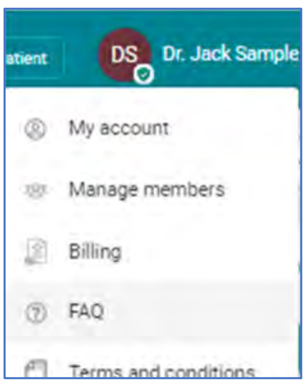


- Enter the ***Start date*** and ***End date*** range for the Billing file.
    - *The value can be manually entered in YYYY-MM-DD format.*
    - *Alternatively use the calendar icon associated with field (to open a calendar grid to select the year and date using a calendar view).*
- Click the ***File type*** field and use the drop-down list to select the File type for the billing.
- Click the 'Submit To Billing Provider' button to generate and transmit the billing file

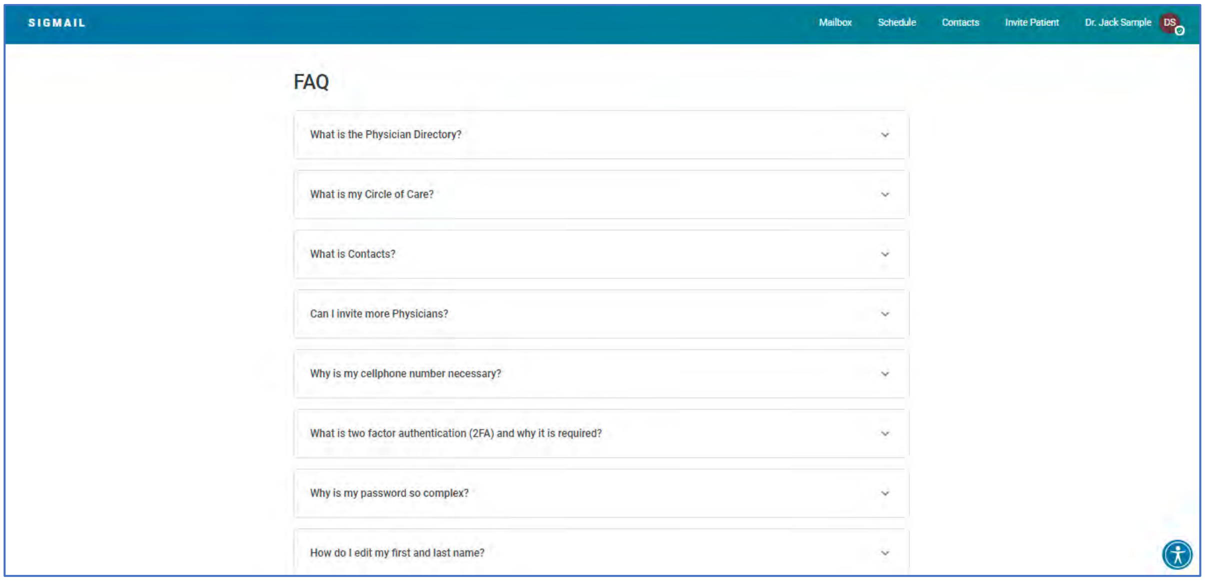
13.4 FAQ

To view the **'FAQ' (Frequently Asked Questions) page** of the SigMail system:

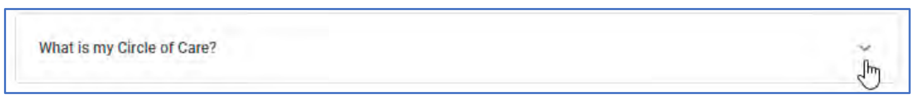
- Click on the **'*FAQ*'** option on the menu list.



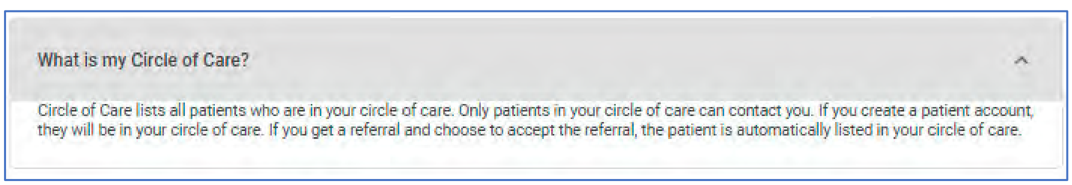
- The main SigMail account window will now display the **'My account' window**.



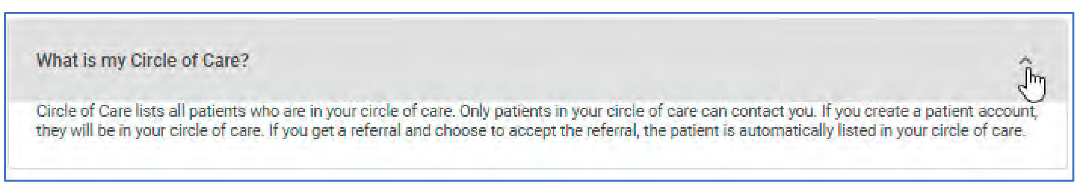
- *Several FAQ subjects are listed on this window.*
  - *To view the answer to a specific FAQ question, click on the 'down' arrow button within the question box.*



  - *The selected question box will then be expanded. The question text will be highlighted, and the corresponding answer details will now be viewable.*



  - *To collapse the answer detail, click the 'up' arrow button.*

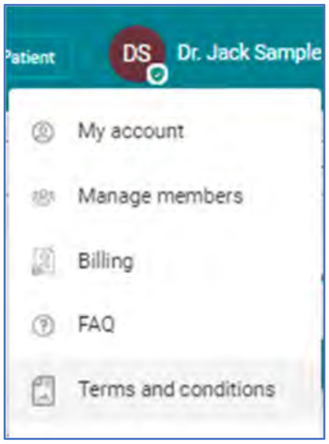


- Select a different menu option to exit the screen.

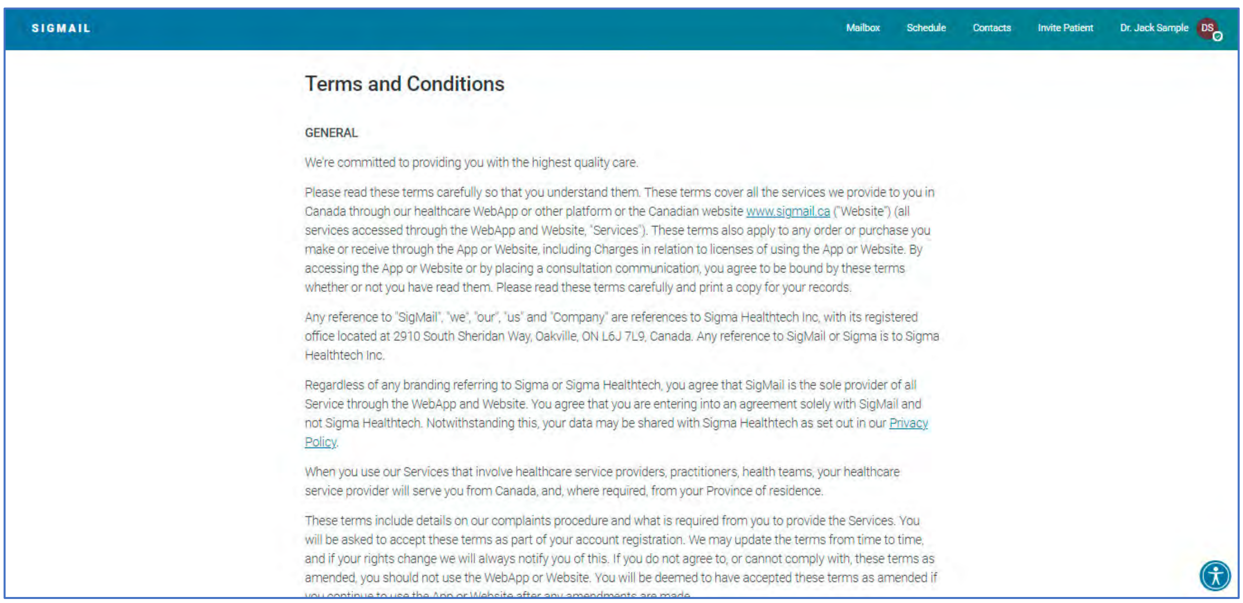
13.5 Terms and Conditions

To view the **'Terms and conditions' page** of the SigMail system:

- Click on the ‘***Terms and conditions***’ option on the menu list.



- The main SigMail account window will now display the **‘Terms and Conditions’ window**.

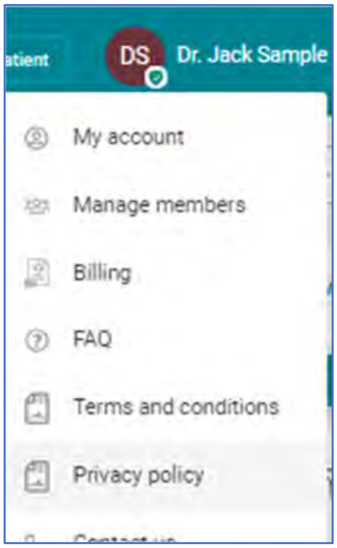


- Select a different menu option to exit the screen.

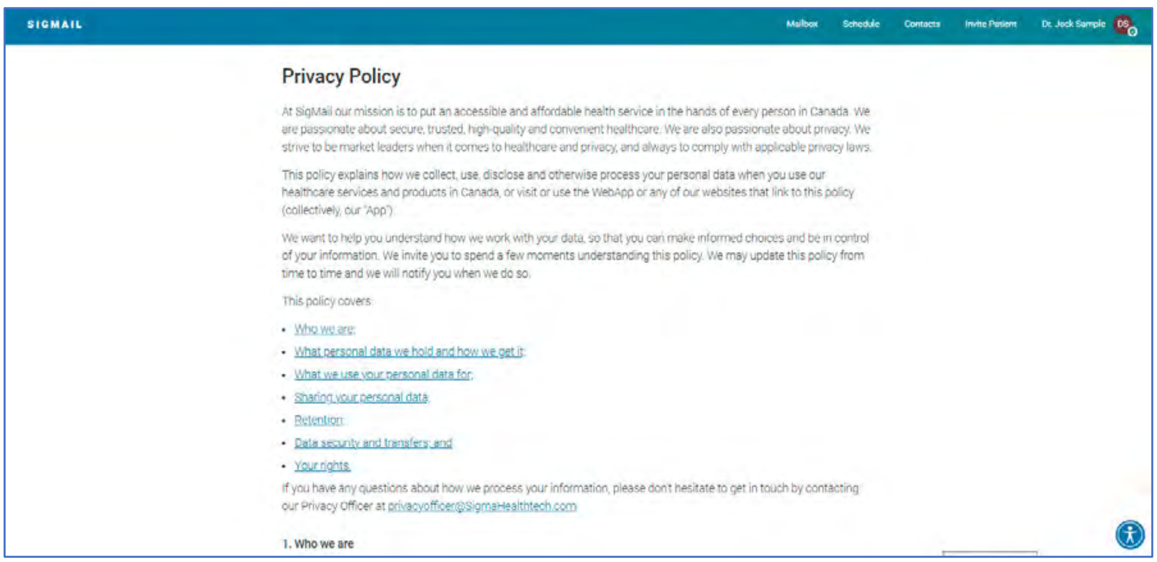
13.6 Privacy Policy

To view the ‘**Privacy Policy’ page** of the SigMail system:

- Click on the ‘***Privacy policy***’ option on the menu list.



- The main SigMail account window will now display the **'Privacy Policy' window**.

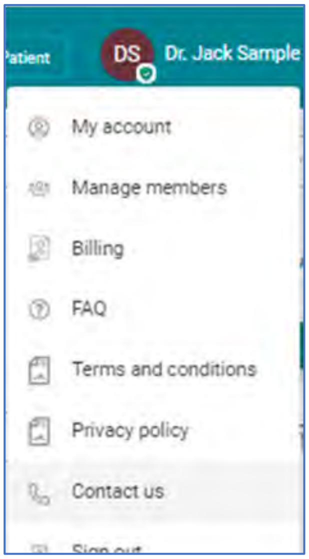


- Select a different menu option to exit the screen.

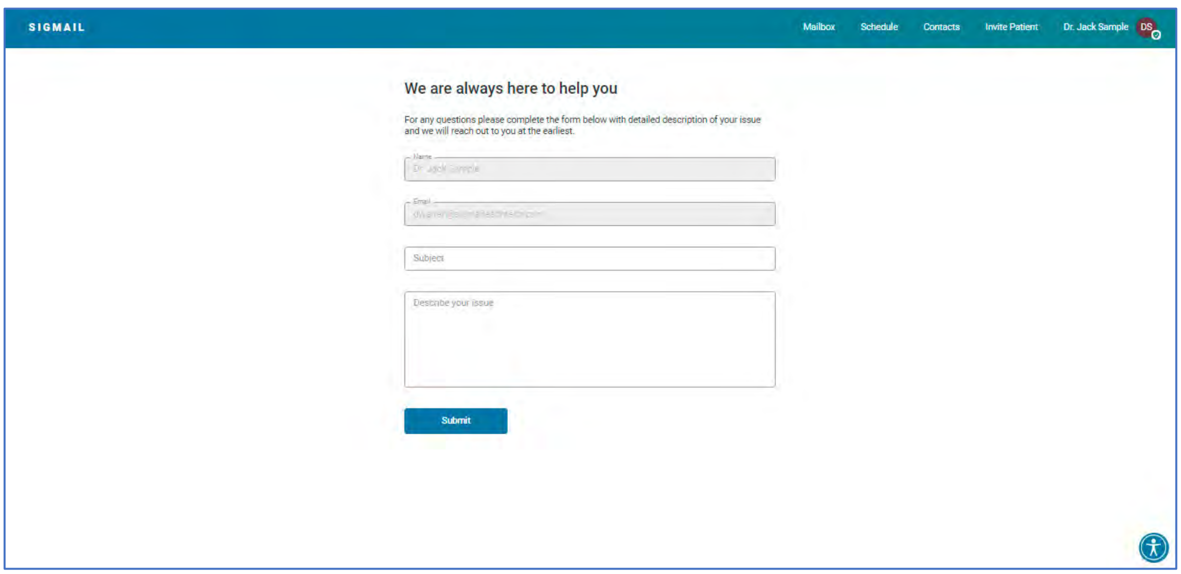
13.7 Contacts Us

To view the '**Contact Us**' page of the SigMail system:

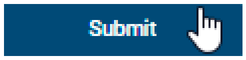
- Click on the **'*Contact us*'** option on the menu list.



- The main SigMail account window will now display the **Contact Us window**.



- *The Contact Us page will allow you to submit a question/issue to the SigMail Admin team.*
  - *The 'Name' field will be pre-populated with your name (as recorded under your SigMail account Profile.) This field is protected and cannot be edited.*
  - *The 'Email' field will be pre-populated with the Email associated with your SigMail account Profile. This field is protected and cannot be edited.*
  - ***Click on the 'Subject' field and enter text to describe the issue that you wish to submit to the SigMail Admin team.***
  - ***Click on the 'Describe your issue' box and enter a detailed description of the issue.***
  - ***Click the 'Submit' button to submit your inquiry.***



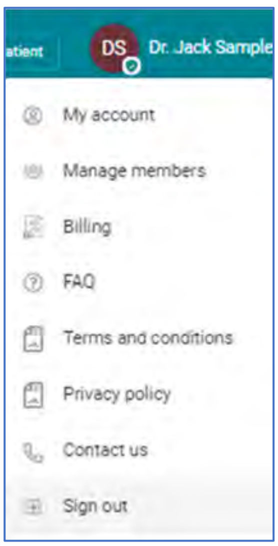
- *The Contact Us page will then be refreshed. (The 'Subject' field and 'Describe your issue' box will become blank).*

- You can then submit an additional inquiry (if desired) or select a different menu option to exit the screen.

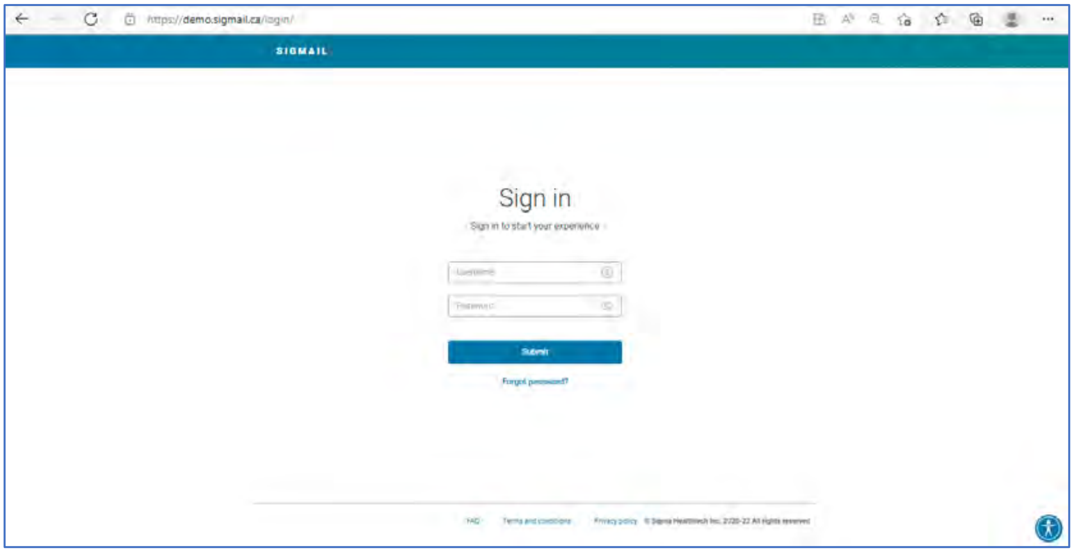
13.8 Sign Out

To securely exit your SigMail account:

- Click on the ***'Sign out'*** option on the menu list.

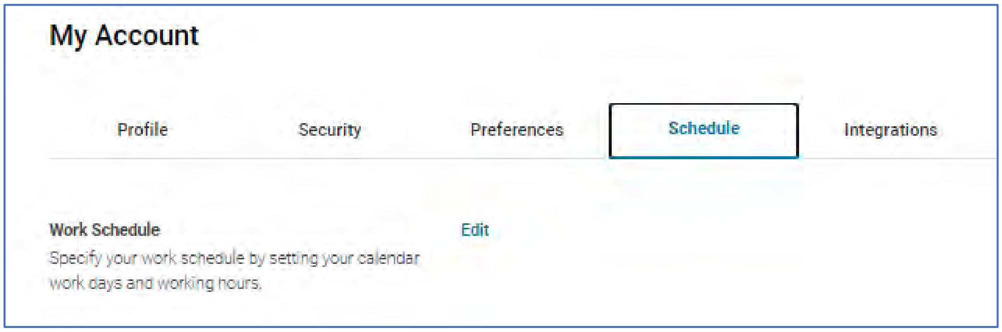


- Your SigMail account will now be closed, returning you to the **'Sign in**' window of the SigMail system.


https://demo.sigmail.ca/login/
SIGMAIL
Sign in
Sign in to start your experience
Submit
Forgot password?

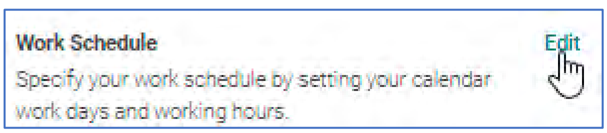
14 Adding your 'Work Schedule' to SigMail Calendars

The Schedule tab allows you to schedule your normally worked hours each workweek so that other staff know when you are available when scheduling video visits or other calendar-related events.

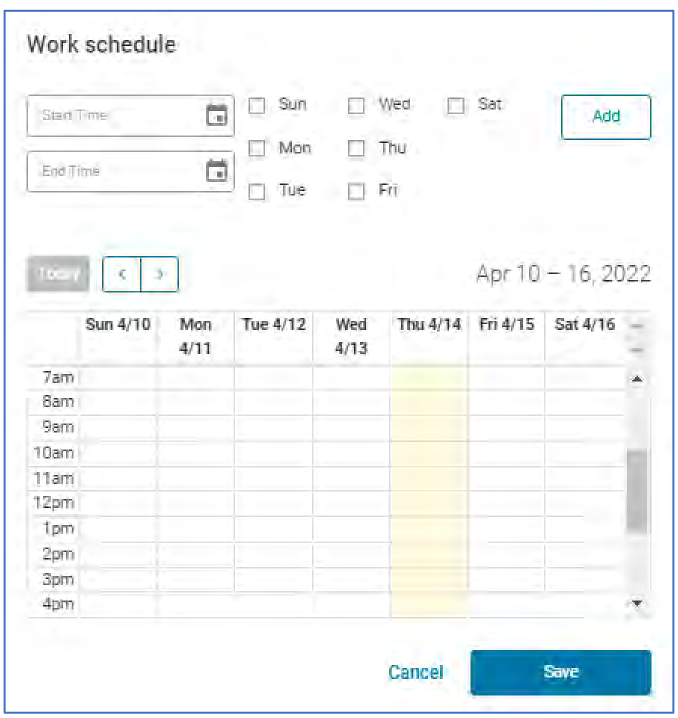


To enter and edit the **'Work Schedule'** calendar:

- Click on the '**Edit**' button provided for this field.



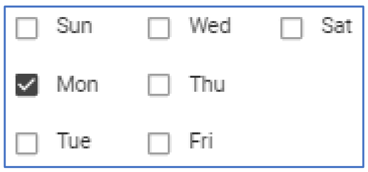
- A ***'Work Schedule' pop-up window*** will be presented for you to input and edit the day-by-day hours you are scheduled to work for a specific calendar week.



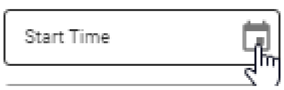
- **Confirm/select the Calendar Week that you wish to manage.**
  - You will initially be presented with the current workweek timetable.
  - Today (current date) will be shaded in orange within the timetable grid.

  - To select a different calendar week to view and edit, use the arrow buttons to toggle forward or backward by workweek.

- **Select the Day within the selected week to input your work hours.**

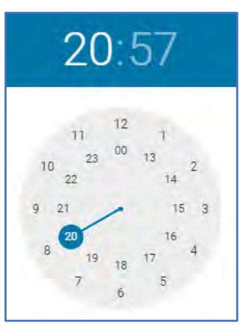


- **Click the 'Start Time' field to enter the start time for that workday**.



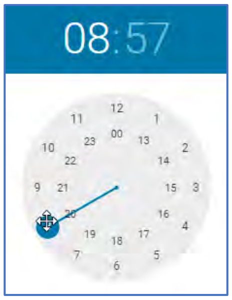
  - If you click on the left portion of the field, you can manually enter the time (in 00:00 format).

  - Alternatively, you can click on the calendar symbol within the field. A pop-up window with an hour clock will then be presented.
    - *The current time will initially be shown with the current 'hour' highlighted.*

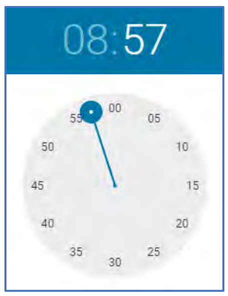


    - *Use your cursor to rotate the clock hand to the desired Start Time **hour**.*

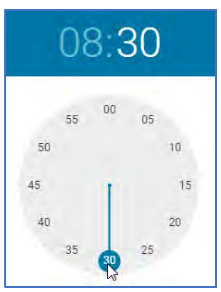
      (HINT: The outer clock ring indicates AM hours; the inner ring indicates PM hour. Be sure you are selecting the appropriate hour by positioning your cursor on the appropriate ring.)



- *Once you select the Start Time **hour** and release your cursor, the pop-up window will then display and highlight the Start Time **minutes**.*

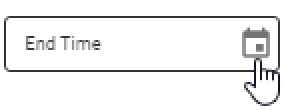


- *Use your cursor to rotate the clock hand to the desired Start Time **minutes**.*



- *Once you select the Start Time **minutes** and release your cursor, the pop-up window will close. The Start Time that was selected using the pop-ups will now be populated in the **Start Time** field.*

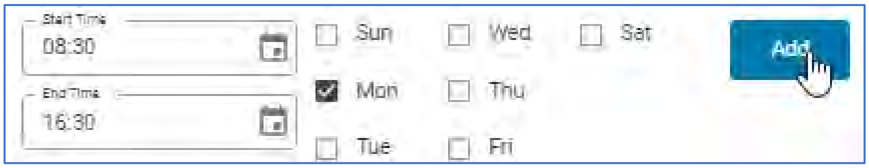
- **Click the 'End Time' field to enter the end time for that workday**.



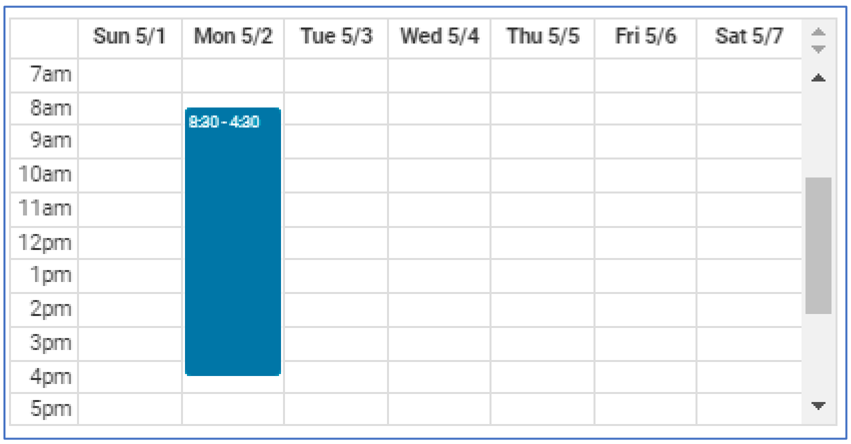
- Perform the same steps as above to enter the End Time for the selected workday.
  - You can click on the left portion of the field and manually enter the time (in 00:00 format).

- Alternatively, you can click on the calendar symbol within the field (and use the pop-up windows to select the End Time ***hour*** and End Time **minutes** by rotating the clock hands.)

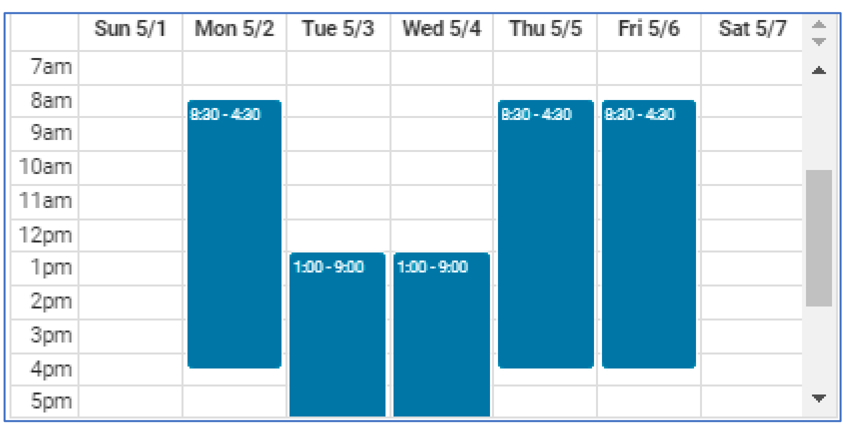
- **Once both the Start Time and End Time fields are entered, click the 'Add' button.**



- The work hours added for that specific workday will then be added and highlighted in the calendar grid.

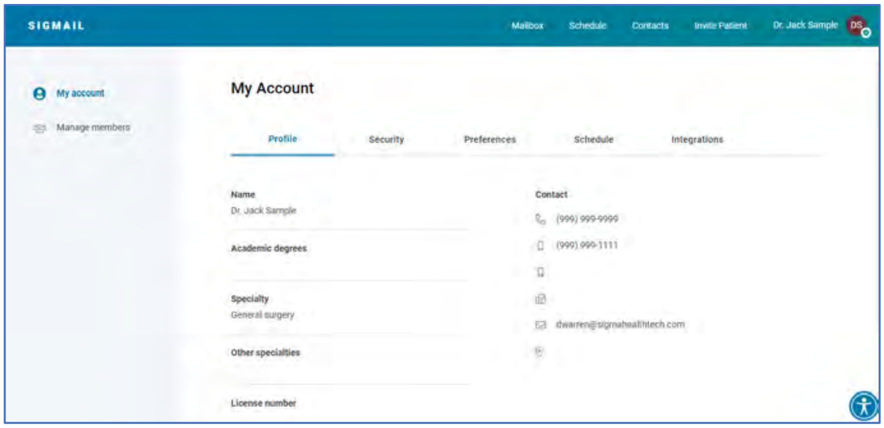


- **Repeat the steps for *__each workday__* of the selected week.** (Select the next work Day, enter the Start Time and End Time for that day, and then 'Add' it to the calendar grid.)

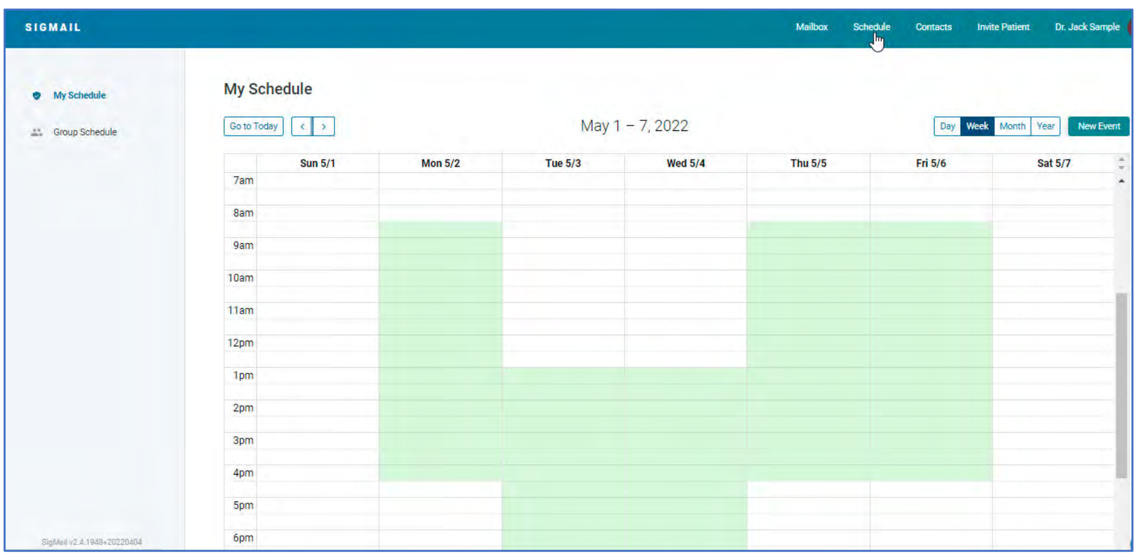


- **Once you have added the Start Time and End Date for each workday, you will need to save the workweek into the calendar. Click the 'Save' button at the bottom of the pop-up.**

- The pop-up window will close, returning you to the 'Schedule' tab of the 'My account' window.



- If you then access the **'Schedule' tab screen** of your SigMail account, the Work Schedule entries that you saved will now be reflected in your personal schedule calendar (highlighted in green within the calendar grid).

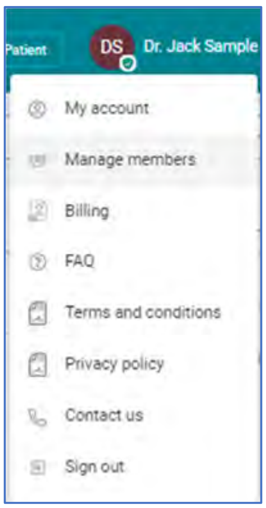


15 Managing your SigMail Members

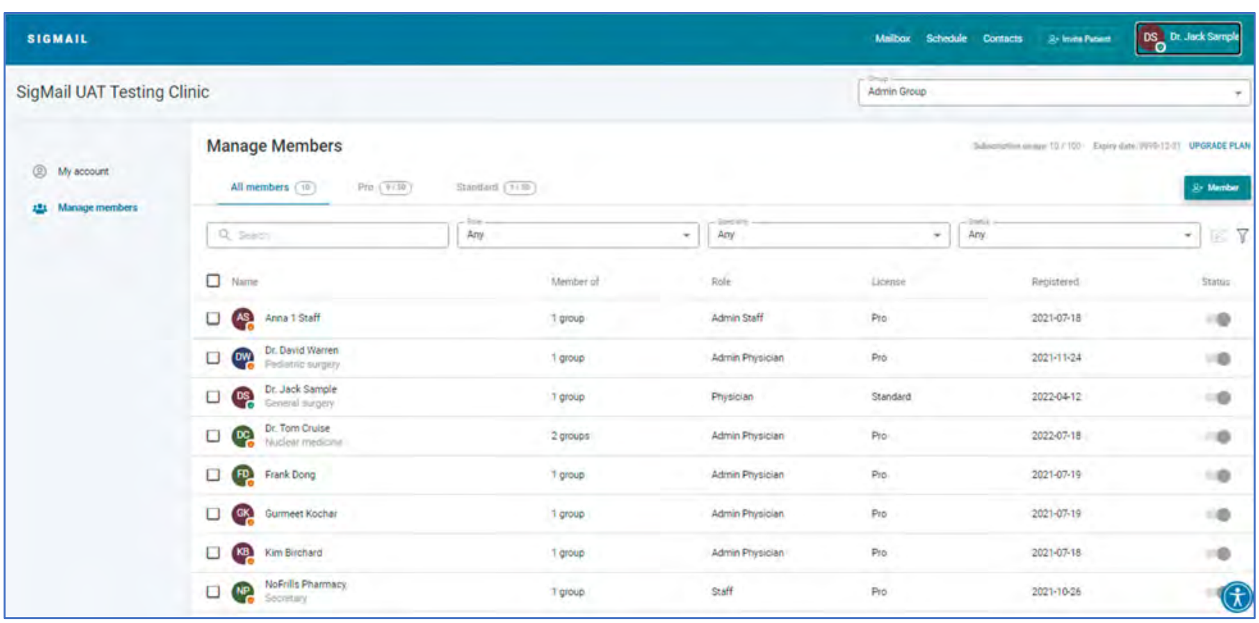
As briefly described in the overview above (Section 13.2 entitled 'Manage Members'), a 'Manage Members' screen is available for performing perform various functions for maintaining your listing of SigMail Members.

To view the **'Manage Members' page** of the SigMail system:

- Click on the ***'Manage members'*** option on the Account Settings drop-down menu



- This screen provides a listing of all your SigMail Members. Each row includes a status of each member invitation.



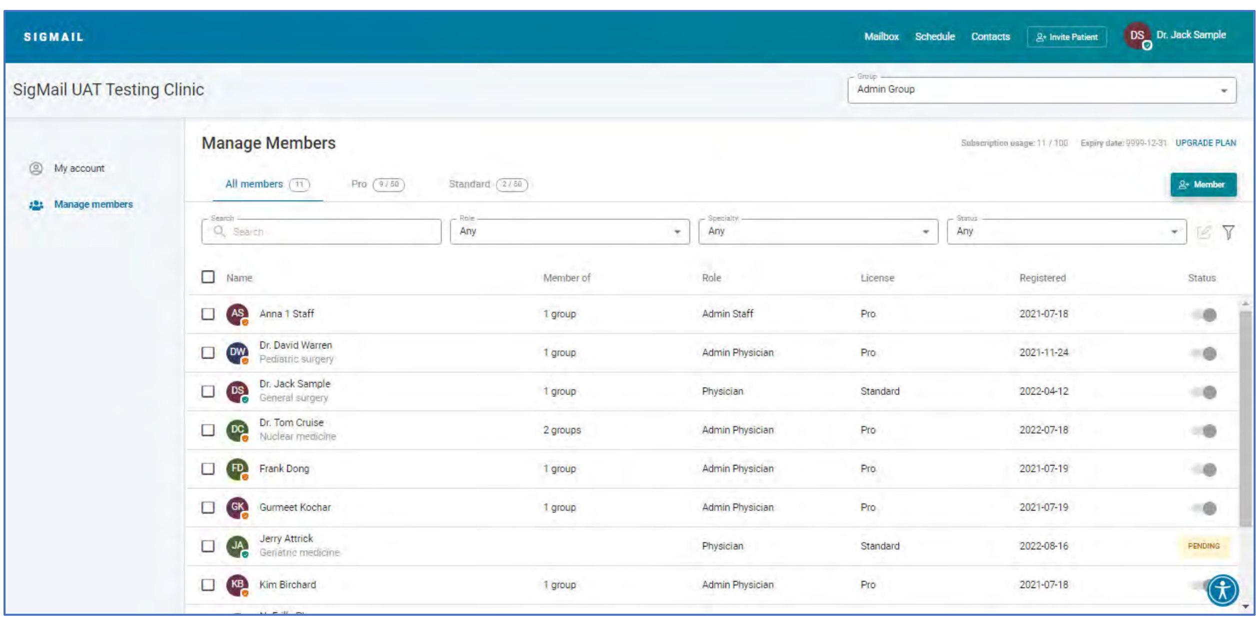
The Manage Members screen provides the abilities for:

- ***search and filter*** *the Manage Members list*
- ***create/send a new SigMail message to one or more selected members on the list***
- ***sending an invitation to an individual patient*** to register and use a Guest Account for SigMail
- ***sending a bulk invitation to a group of patients*** to each register and use a Guest Account
- ***sending an invitation to a physician or clinic administrator*** to register and use a SigMail Account
- ***monitoring the status of outstanding registrations*** and Resend, Revoke or Remove these invitations as necessary

Each of these functions are explained in the detailed sections that follow.

15.1 Searching and Filtering the 'Manage Members' List

When viewing the *Manage Members* listing:



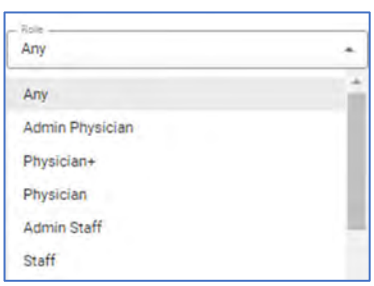
At the top of the window, you are provided various search and filtering options:

- A ‘**Search**’ box allows you to search and filter the *Manage Members* list based on specific text:

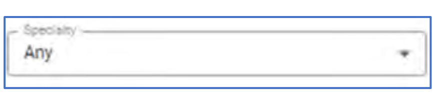
- *Start entering text within the ‘Search’ text box.*
- *As you type each character, the list will immediately be filtered to only include those Member rows that contain that matching character string.* ***Matching is performed using all displayed column values (‘Name’, ‘Member of’, ‘Role’, ‘License’ and ‘Registered’).*** *If the entered ‘Search’ character string matches the characters found in any of these five columns, only those Member rows will remain on the filtered list.*

- The ‘***Role***’ box allows you to filter the *Manage Members* list based on a selected Specialty:

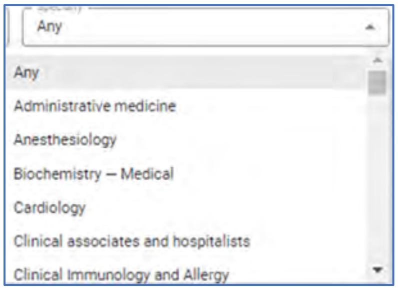
- *Click the field to open the drop-down list. Select a specific Role using the list (if applicable).*



- The ‘***Specialty***’ box allows you to filter the *Manage Members* list based on a selected Specialty:



- *Click the field to open the drop-down list. Select a specific Specialty using the list (if applicable).*

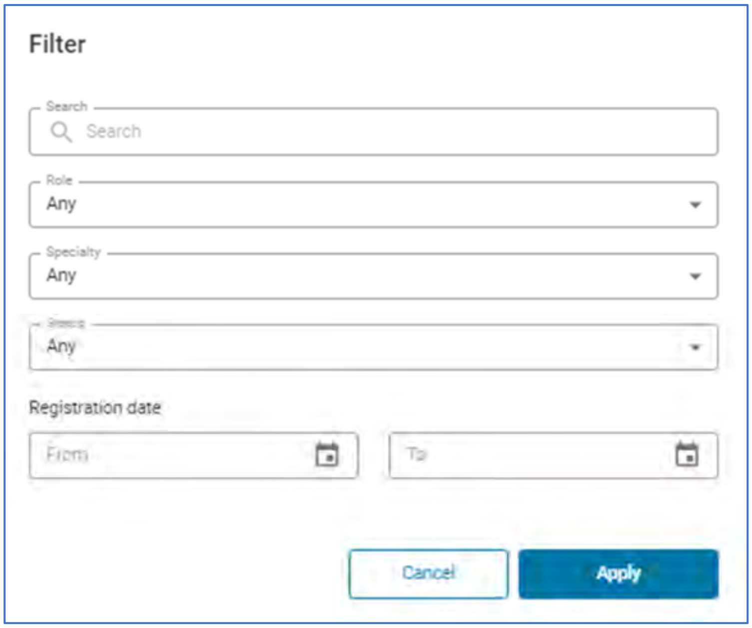


- The '***Status***' box allows you to filter the *Manage Members* list based on the Status of a member's SigMail account:

  - *Click the field to open the drop-down list. Select a specific Specialty using the list (if applicable).*

- Additional filtering capabilities are available using a ***Filter pop-up screen***.
  - Click the *Filter* icon located above the listing (to the left of the filter selection boxes).

  - A *Filter pop-up window* will be displayed.



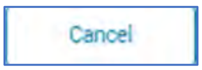
- *The **Search**, **Role**, **Specialty**, and **Status** fields are repeated on this pop-up. If you had already specified criteria for any of these fields (on the main screen before opening the pop-up), the entered value will be displayed (and editable) on this pop-up.)*

- *The **Registration date 'To'** and **Registration date 'From'** boxes allow you to additionally filter the Manage Members list based the SigMail Registration Date of these contacts:*
  - Use each of these fields to enter your search date range. The value can be manually entered in YYYY-MM-DD format.
  - Alternatively use the calendar icon associated with field (to open a calendar grid to select the year and date using a calendar view).
    - If you specify a date range (both a 'To' and 'From' date), the Manage member list will be filtered to include those contacts whose Registration Dates fall *within this range* of dates.
    - If you specify only a 'To' date, the filter will include all contacts whose Registration Dates are *on or after* that date.
    - If you specify only a 'From' date, the filter will include all contacts whose Registration Dates are *on or before* that date.

- Once you have completed your entries/selections within the *Filter pop-up*, click the ***Apply*** button.

- The *Filter pop-up window* will close, returning you to the *Manage Members* directory listing. The listing will now be filtered; only those members that matched the selected criteria will be listed.

- Alternatively, if you wish to return to the main *Manage Members* directory screen *without using the Filter pop-up criteria*, click the *Cancel* button.



- The *Filter pop-up* screen will close, returning you to the main *Manage Members* directory screen. *Any criteria entered using the pop-up screen will be cleared and ignored.*

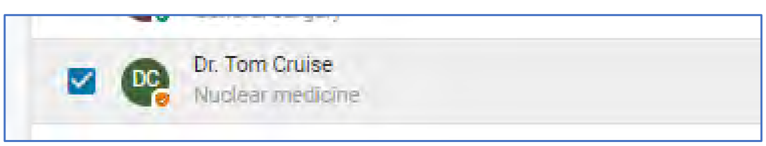
If the *Manage Members* list has been filtered, a pink banner labeled ‘*Reset filter*’ will appear above the listing.

- To remove any filtering criteria, click the *‘**Reset filter**’ banner*.
- The *Manage Members* directory listing will be refreshed; the full (unfiltered) list of contacts will be restored to the list.

15.2 Sending SigMail Messages from the ‘Manage Members’ List

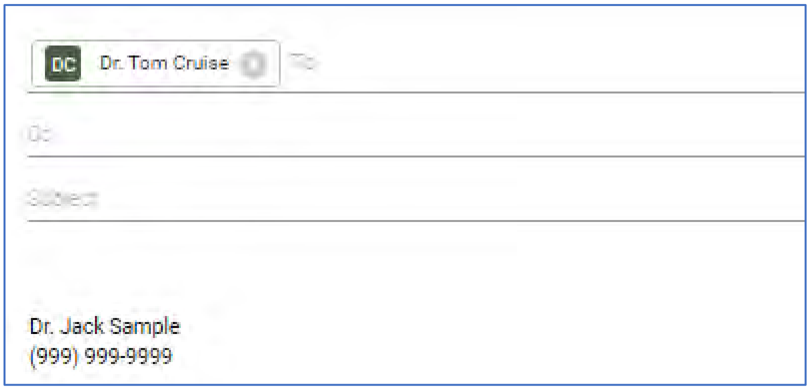
You can send a New Message to any of your Client Contacts within SigMail directly from this Manage Member window. There are two methods:

- **One option is to select the Member(s) that you wish to message from the directory list.** Click on the checkbox of the row(s) that you want selected.



- Click the ***New Message icon*** located above the listing (to the left of the filter selection boxes).

- The right-hand side window will then display a draft message form.

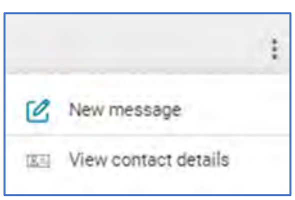


- The selected Member(s) will be pre-populated in the 'To' field at the top of the form.
- Complete the remaining Message Content as needed (as you would when composing any other New Message).
- Click the '***Send***' button to issue the message (and return to the '*Manage Members*' directory listing.)

▪ **Alternatively,** you can send a message to a selected member by positioning your cursor on the desired contact row on the list. The row will be highlighted and allow you to **open the action menu (located to the right of the contact name).**

- Click the menu icon to open the Action menu drop-down list for that contact row.

- Click the '***New message***' option on the Action menu



- The right-hand side window will then display the same draft message form.
- Again, the selected member will be pre-populated in the 'To' field at the top of the message form.

- Complete the remaining Message Content as needed (as you would when composing any other New Message). Click the '***Send***' button to issue the message (and return to the 'Manage Members' directory listing.)

NOTE*:*

For additional details on creating a new SigMail message, please refer to **Chapter 8 (Sending a New Message)** above.

That chapter outlines various feature available for SigMail messages, including:

- setting Flag Indicators

- attaching supporting documents

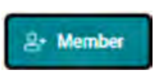
- save as a Draft (rather than Send)

15.3 Inviting a Patient (Single Invite)

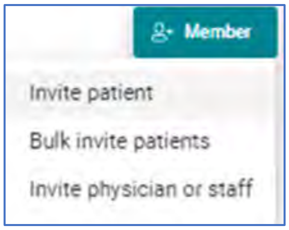
A Patient can be added to the SigMail system to provide them with their own guest account. This will allow the patient to login to their own SigMail Inbox and be able to exchange medical information securely with their Circle of Care physicians.

To send an invitation to an **individual Patient** to register and use a Guest Account for SigMail:

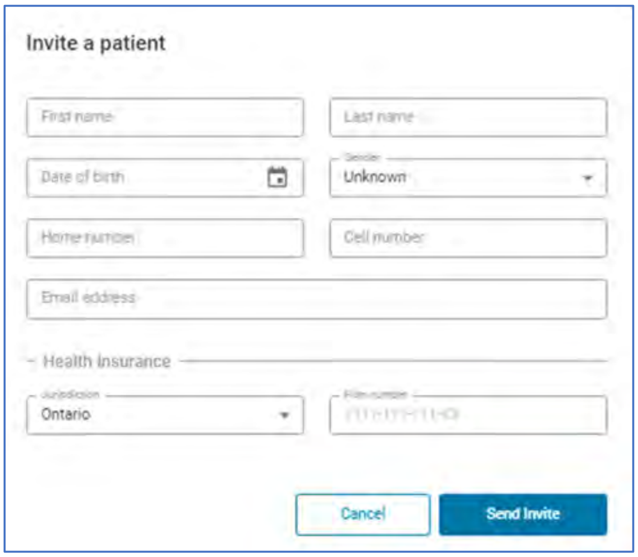
- Click on the '**Create Member**' button provided on the top-right side of the Manage Members screen (above the Member listing).



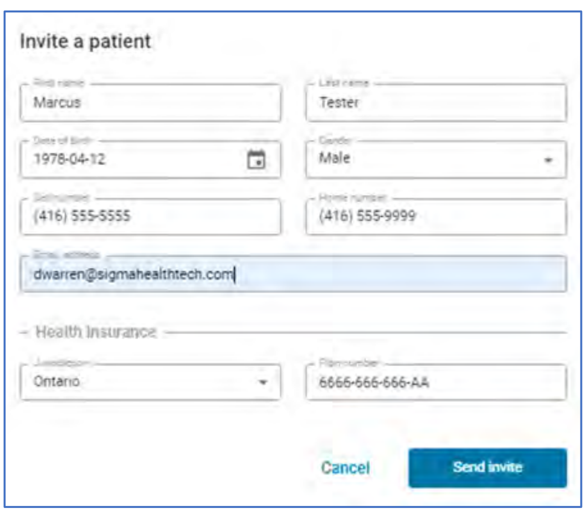
- The 'Create Member' drop-down menu will open. Click the **'Invite patient'** option on the drop-down list.



- A ‘Invite a patient’ pop-up window will be presented.



- Complete the ‘Invite a patient’ form using the provided fields in the pop-up.



- Click the Send Invite button to issue the invitation.

- Once the invitation is sent, a new contact row will be added to your ‘***Circle of Care***’ directory listing for this patient.

NOTE:

Rather than first opening the Manage Members screen, an alternate way to directly access this ‘Invite a patient’ pop-up window is to click the ***Invite Patient*** link found on the toolbar at the top of the SigMail Account window. This toolbar & quick link are available from *any* SigMail screen.

Regardless of which method is used to initiate the ‘Invite a patient’ pop-up window, the steps to complete the process are the same. See Chapter 12 (‘Adding a Patient (Guest) to SigMail’) above.

15.4 Inviting Multiple Patients (Bulk Invite)

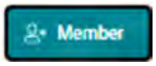
In some cases, a physician or clinic administrator may need to invite a *large number of patients* to each register and use a Guest Account for SigMail *at the same time*. (Typical examples would be enrolling the initial set of patients at a clinic when launching SigMail, or when dealing with a group of new patients enrolling for a new clinical trial.)

Rather than having to individually enrol each patient using the ‘Single Invite’ method above (Section 15.1), **SigMail also supports the ability to perform a ‘Bulk Invite’ whereby invitations can be sent to a full list of patients in one action.**

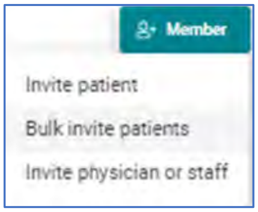
This is achieved by first creating a Patient List in *a pre-defined Comma Separated Values (CSV) file format*. The file is then uploaded to SigMail, enabling you to then send invitations to the entire list.

To send multiple invitations to a **List of Patients**:

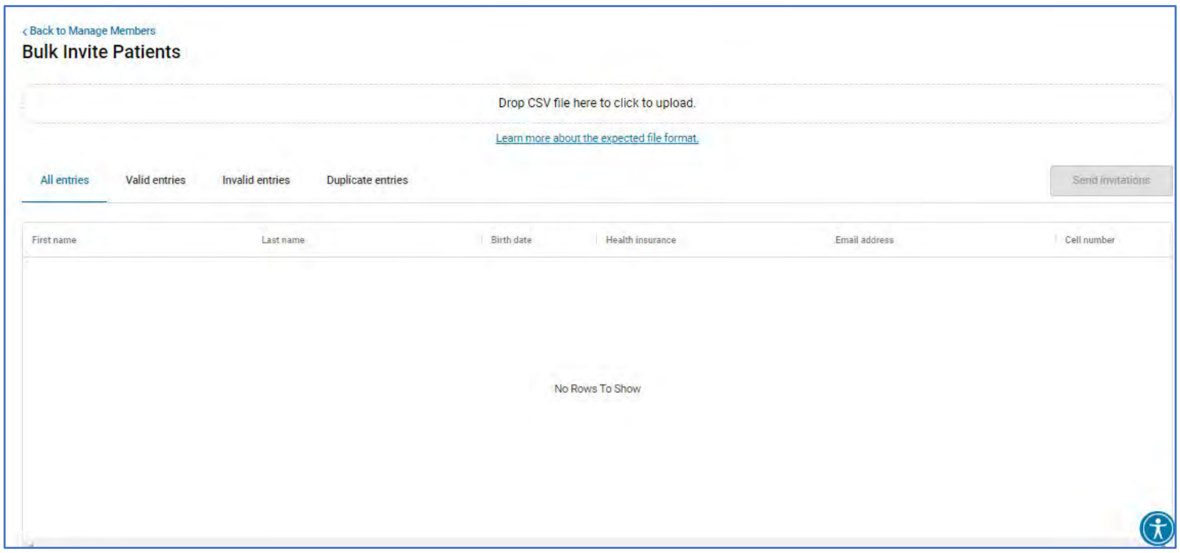
- Click on the ‘**Create Member**’ button provided on the top-right side of the Manage Members screen (above the Member listing).



- The 'Create Member' drop-down menu will open. Click the **'Bulk invite patients'** option on the drop-down list.



- The Bulk Invite Patients' screen will be presented.



- **Prepare your Bulk List of patients** in the pre-defined Comma Separated Values (CSV) file format.
  - To refer to the file layout specifications, click on 'Learn about the expected file format' link.

  - A 'File format' pop-up window will be presented providing the expected file format details (including *header* plus the *column values* needed for each patient record).

File format ×

To avoid errors, please make sure that the file you select is a comma-separated value (CSV) file with a header line containing the columns matching the sequence and names as given in the table below.

Note that a maximum of 250 records will be processed from the file and any excess data over this limit will be ignored.

Column number	Expected name	Description
1	first_name	First name
2	last_name	Last name
3	dob	Date of birth (YYYY-MM-DD)
4	hc_type	Health plan jurisdiction
5	hin	Health plan number
6	email	Email address
7	phone	Cell number (can be empty)

Sample:

```
first_name,last_name,dob,hc_type,hin,email,phone
John,Doe,1980-01-01,ON,9876-543-210-JD,john.doe@example.com,905-509-9055
Jane,Smith,1975-12-31,QC,ABCD-9876-5432,jane.smith@example.com,438-834-4388
```

- Using these specifications, create an Excel file accordingly. Include the header (column names) record, followed by a detail record for each patient to be included in your Bulk Invite.

	A	B	C	D	E	F	G
1	first_name	last_name	dob	hc_type	hin	email	phone
2	Linda	Lawrence	1967-07-24	ON	9876-211-210-LL	linda.lawrence@rogers.com	905-511-5555
3	Robert	Reilly	1977-06-12	ON	9876-504-145-RR	robbie.reilly@example.com	416-725-5555
4	Daniel	Warner	1983-10-05	ON	9876-633-339-DW	dandwar@bell.net	519-452-5555
5	Mary	Mitchel	1966-09-09	ON	9876-884-606-MM	mar.mitch@example.com	613-729-5555
6							

- Once you have created the Excel File, save the file using a file format selection of '**CSV (Comma delimited)**' (*.csv).

File name:	Patient List - SigMail Invites - 20220807
Save as type:	CSV (Comma delimited)

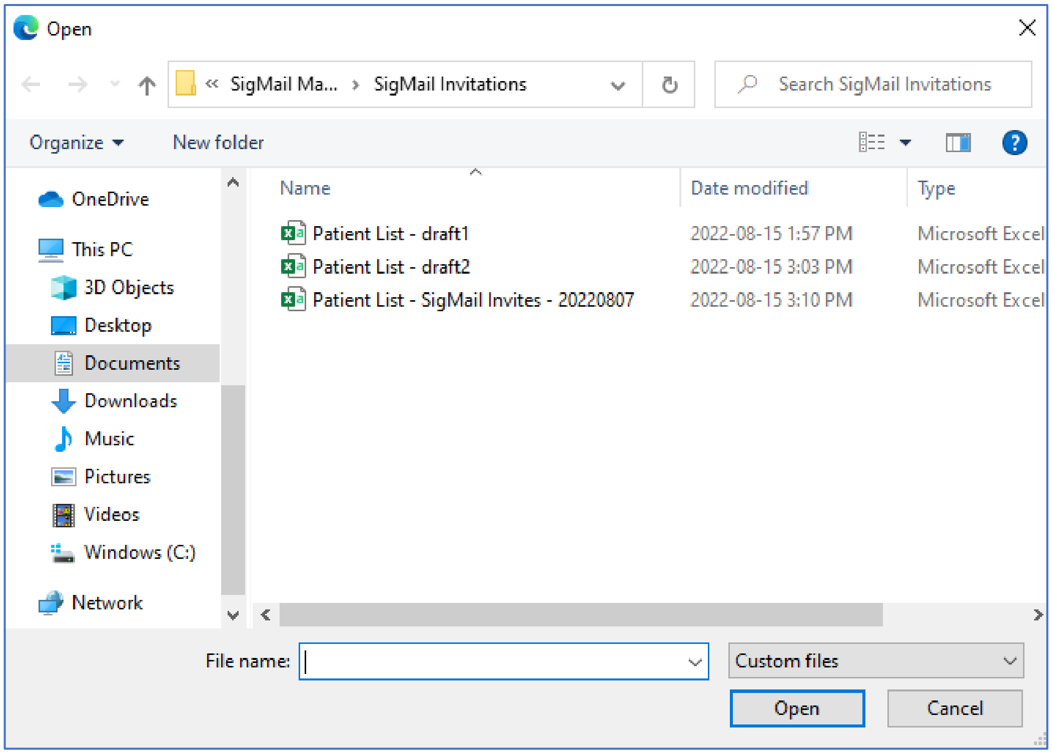
- Close the 'File format' pop-up window by clicking the 'x' in the top-right corner, returning you to the 'Bulk Invite Patients' screen.

×

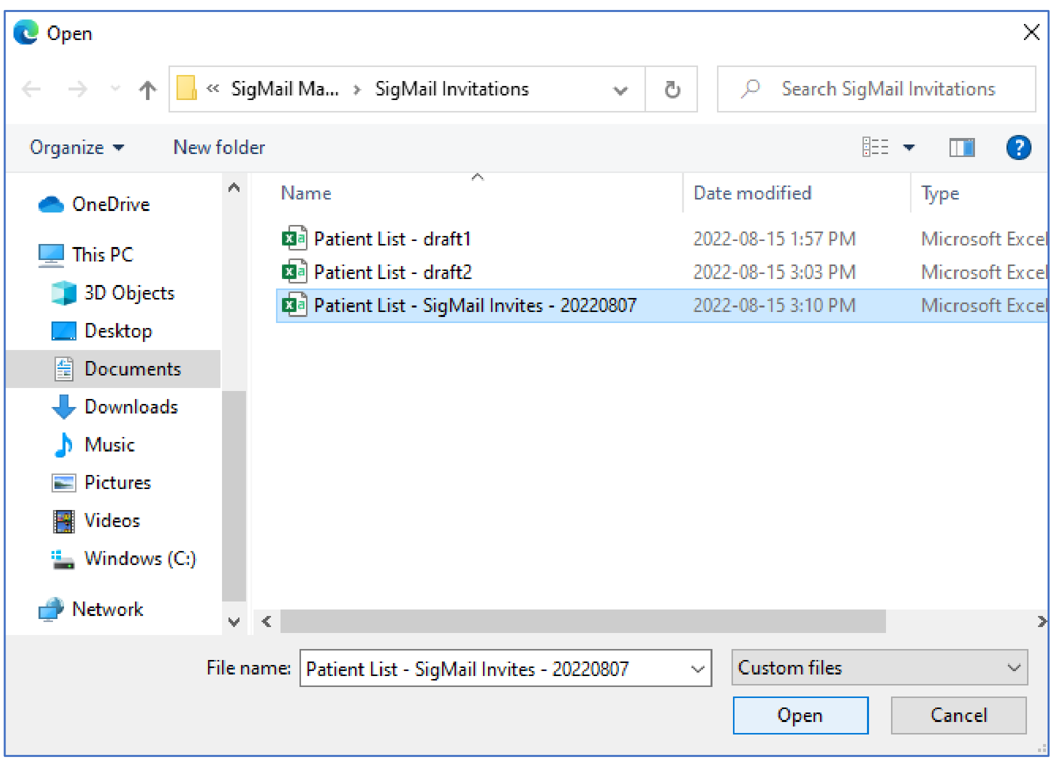
- To **upload** the prepared Bulk Invite file to SigMail for validation:
  - On the 'Bulk Invite Patients' screen, click the 'Drop CSV file here to click to upload' drop box.

Drop CSV file here to click to upload.

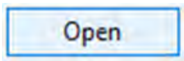
- The File Folder directory pop-up window of your computer will open.



- Open the file folder in which the Bulk Invite CSV file was saved. Click on the file row on the list to highlight and select it.

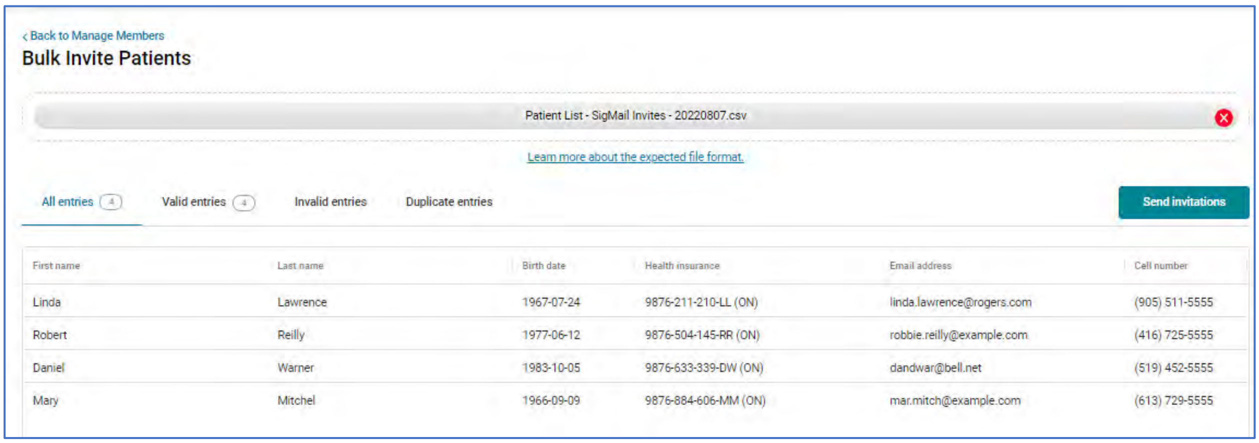


- Click the 'Open' button to upload the file. The file folder pop-up window will close, returning you to the Bulk Invite Patients screen.

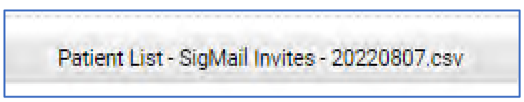


- SigMail will then validate the file contents for upload. The validation results will then be displayed on the screen.

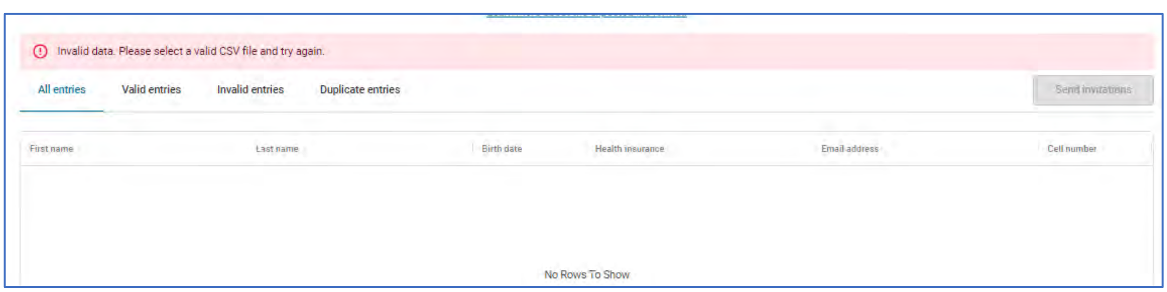
- **Review the file validation results** of the upload before continuing.



- The file name that was uploaded will be displayed in the Drop CSV File box.

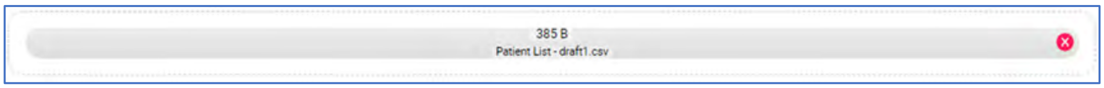


- **If there was any issue with the file format or file layout, this will be reported by a highlighted error message** *('Invalid data. Please select a valid CSV file and try again.')* **at the top of the screen.**



  - This indicates that the *entire file* was rejected. A file-level failure means no patient records can be uploaded. The record list area of the results screen will be empty ('No Records To Show').

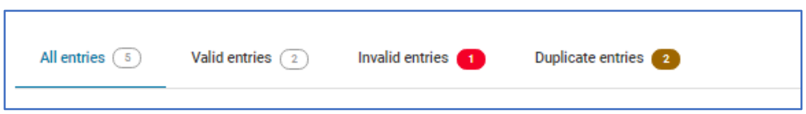
- A file-level failure can occur if *the file format is invalid* (not valid CSV format). It will also occur if one or more records *do not meet the expected file layout specifications,* including:
    - *header record is missing*
    - *header record has errors (column name(s) are misspelled, missing, or not sequenced correctly)*
    - *no detail records*
    - *one or more detail records have an incorrect format (record columns do not match the header definition).*
- To remove the validation results and refresh the Bulk Invite Patients screen, click the red 'X' button (located to the right of the file name).



- **The file will need to be reviewed and any file-level issues will need to be resolved.**

- **Alternatively, the file you uploaded for validation may correctly adhere to the expected file format and file layout specifications** (and therefore not report the '*Invalid data. Please select a valid CSV file and try again.'* message)**.**
- **However, you will need to verify the record-level results to insure there are no issues with any individual patient records within the file.**

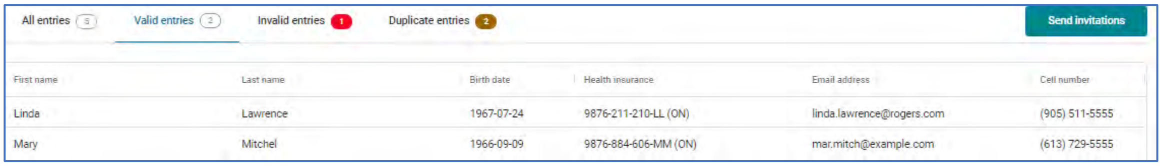
    - The record list area shows the results of the individual record contents. You will notice this area has four separate tabs.



- The screen will initially display the '**All entries**' tab. This lists ***all*** the records from the file (regardless of whether they are valid, invalid or duplicate records).

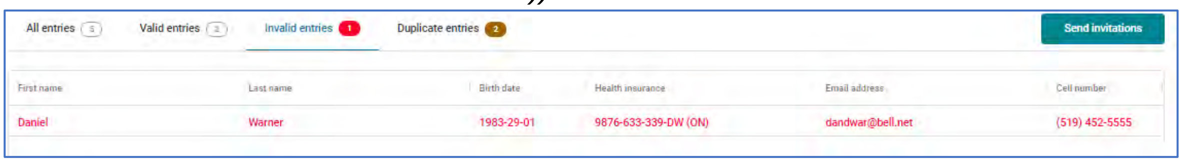
First name	Last name	Birth date	Health insurance	Email address	Cell number
Linda	Lawrence	1967-07-24	9876-211-210-LL (ON)	linda.lawrence@rogers.com	(905) 511-5555
Robert	Reilly	1977-06-12	9876-504-145-RR (ON)	robbie.reilly@example.com	(416) 725-5555
Daniel	Warner	1983-29-01	9876-633-339-DW (ON)	dandwar@bell.net	(519) 452-5555
Mary	Mitchel	1966-09-09	9876-884-606-MM (ON)	mar.mitch@example.com	(613) 729-5555
Robert	Reilly	1977-06-12	9876-504-145-RR (ON)	robbie.reilly@example.com	(416) 725-5555

- Click the '**Valid entries**' tab to view only the patient records that are valid and ready for upload.

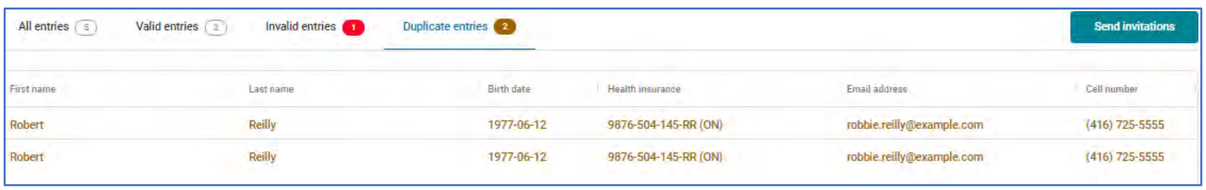


- Click the **'Invalid entries**' tab to display only the patient records that have field-level errors. (In other words, these records follow the correct record format but have a field value error)

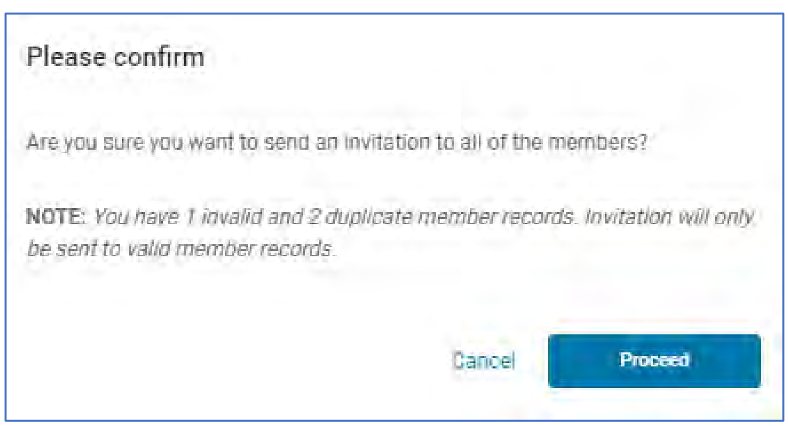
  (In this example, the record has an invalid 'Birth Date' value (1983-29-01) that does not meet the YYYY-MM-DD format.))



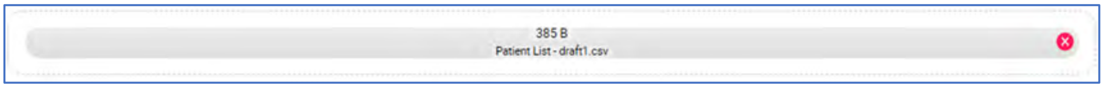
- Click the '**Duplicate entries**' tab to display only patient records that are duplicated within the file.



- ***If any records are being reported as Invalid or Duplicate:***
  - If you proceed with the upload (by clicking the 'Send invitations' button), you will receive a 'Please confirm' pop-up window.
  - If you then 'Proceed' with the file, only the 'Valid entries' will be uploaded and receive an invitation. Any duplicate or invalid records will be ignored and dropped.

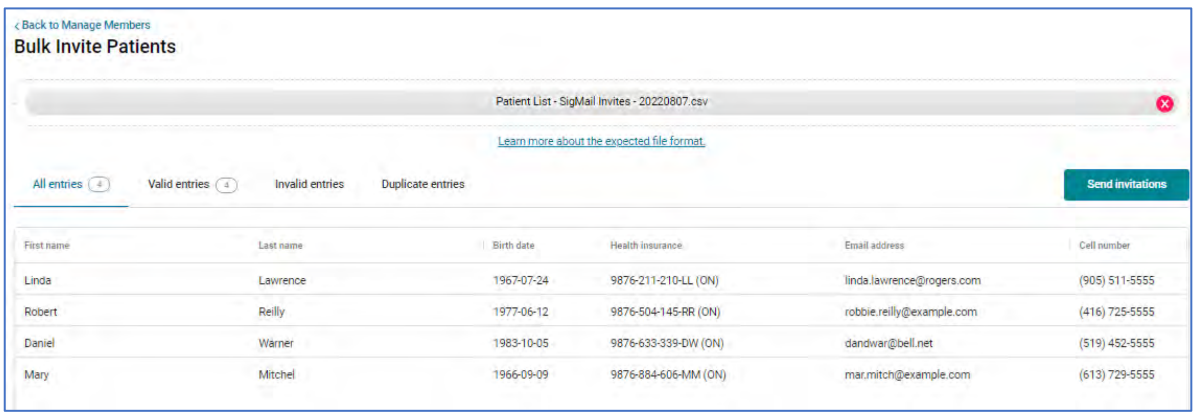


- Rather than proceeding, it is recommended you should correct the file so it can be loaded in its entirety (rather than having to track lost records).
- Click the red ‘X’ button (located to the right of the file name). This will remove the validation results and refresh the Bulk Invite Patients screen. No records will be uploaded from the file.

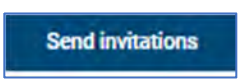


- **Correct the erroneous records and resave the file. You can then repeat the above steps and drop the revised CSV file for upload validation and full upload.**

- To **complete the upload of a validated file and send the patient invitations**:
  - ***If there are no file-level or record-level issues with your file, all records should appear on the ‘Valid entries’ tab*** *(and no records should appear on the ‘Invalid entries’ or ‘Duplicate entries’ tabs).*



  - **If this is the case, you can proceed with completing the ‘Bulk Invite’.**
  - Click the ‘Send Invitations’ button



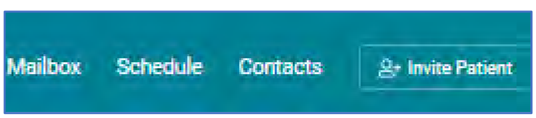
  - You will receive a ‘Please confirm’ pop-up window.
  - Click the ‘Proceed’ button within the pop-up to confirm and send the invitations.

  - A ‘Sending Invitations’ progress pop-up will then be displayed showing the invitations being sent to the patients. The ‘Succeeded’ count will be updated as each invitation is sent.

- Once all invitations are sent, close the pop-up window.

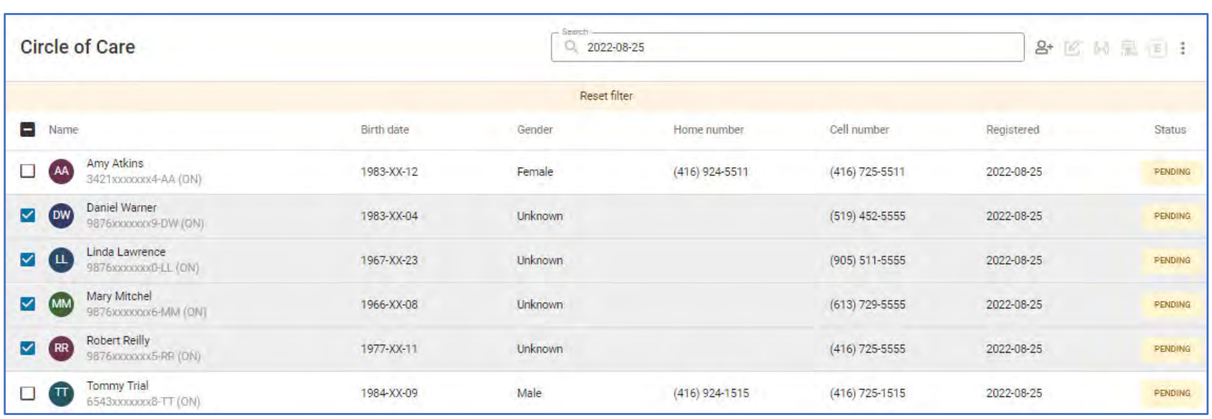
- The Bulk Invite Screen will be refreshed when redisplayed. (The file name will no longer appear in the Drop CSV File box, and the record list area will be cleared.)
- To return to the *Manage Members* window, click the ‘Back to Manage Members’ link (that appears above the screen title).

- To view the new patient contact records that were created by the Bulk Invite, go to the *Contacts* screen (by selecting the link on the main toolbar).



- On the *Contacts* screen, open the ‘*Circle of Care*’ directory. The newly created Patient rows from the Bulk Invite rows will now be added to the directory list.

In the example below, the four selected rows were created by the Bulk Invite process.

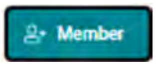


Name	Birth date	Gender	Home number	Cell number	Registered	Status
AA Amy Atkins 3421xxxxxxx4-AA (ON)	1983-XX-12	Female	(416) 924-5511	(416) 725-5511	2022-08-25	PENDING
DW Daniel Warner 9876xxxxxxx9-DW (ON)	1983-XX-04	Unknown		(519) 452-5555	2022-08-25	PENDING
LL Linda Lawrence 9876xxxxxxx0-LL (ON)	1967-XX-23	Unknown		(905) 511-5555	2022-08-25	PENDING
MM Mary Mitchel 9876xxxxxxx6-MM (ON)	1966-XX-08	Unknown		(613) 729-5555	2022-08-25	PENDING
RR Robert Reilly 9876xxxxxxx5-RR (ON)	1977-XX-11	Unknown		(416) 725-5555	2022-08-25	PENDING
TT Tommy Trial 6543xxxxxxx8-TT (ON)	1984-XX-09	Male	(416) 924-1515	(416) 725-1515	2022-08-25	PENDING

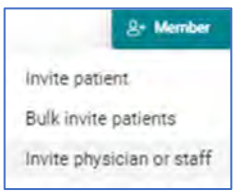
15.5 Inviting Physicians & Staff

To send a SigMail invitation to a Physician or Clinic Administrator:

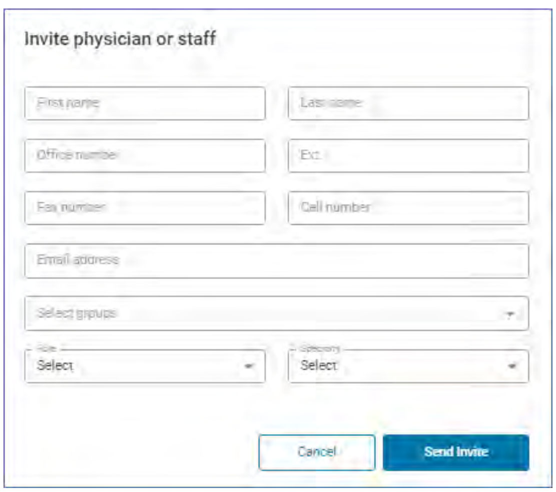
- Click on the '**Create Member**' button provided on the top-right side of the Manage Members screen (above the Member listing).



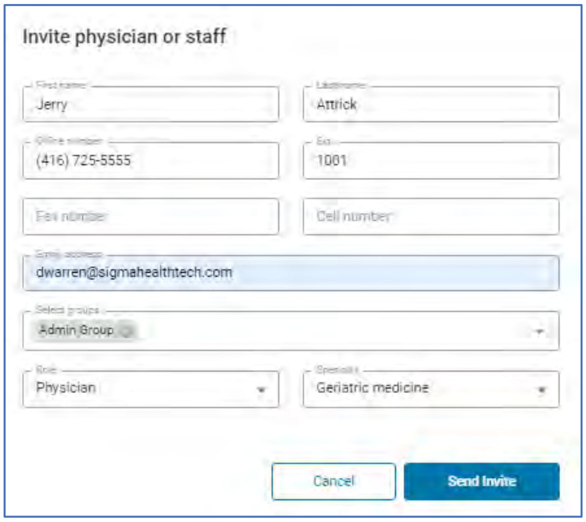
- The 'Create Member' drop-down menu will open. Click the **'Invite physician or staff'** option on the drop-down list.



- A 'Invite physician or staff' pop-up window will be presented.

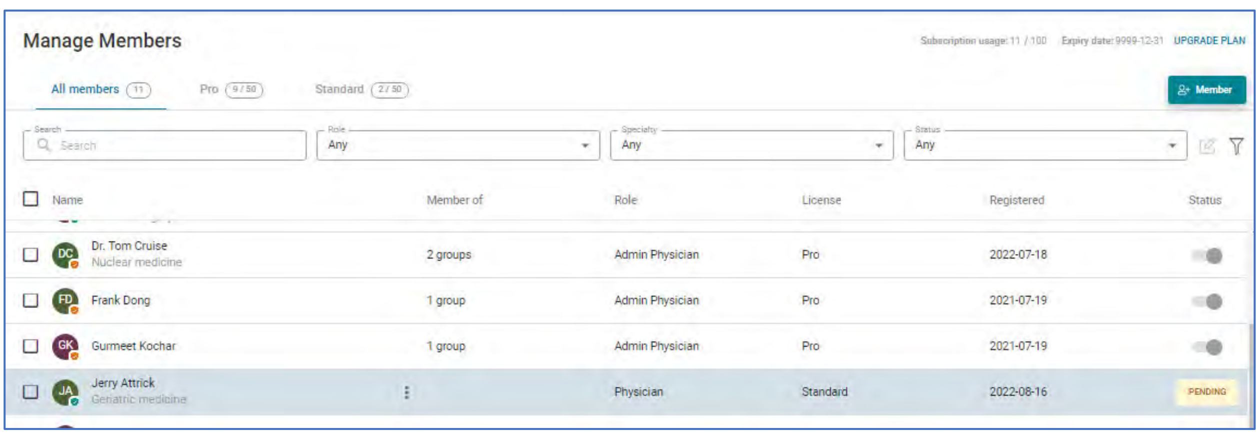


- Complete the 'Invite a physician or staff' form using the provided fields in the pop-up.

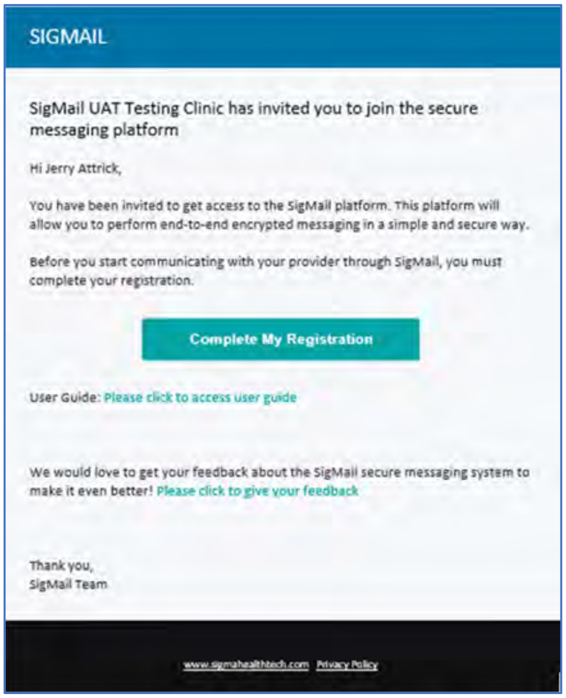


- Click the *Send Invite button* to issue the invitation.

- The *Invite physician or staff* pop-up window will close, returning you to the '*Manage Members'* screen. **A row for the newly invited member will now appear on your member listing of this screen.** The Status of the member will initially appear as 'Pending', indicating that the invitation has been sent but is awaiting completion of the registration by the invitee.



- The invitee will receive an automated email (at the email address entered in the 'Invite patient or staff' pop-up). The invitation email includes a 'Complete my registration' button.



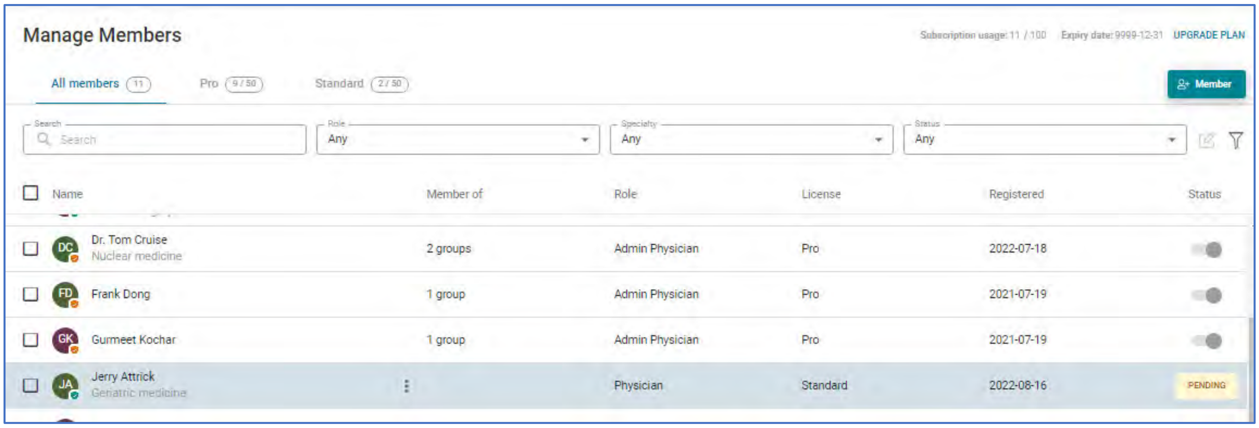
- The Physician/Administrator will then need click the 'Complete My Registration' button within this email to complete the registration process and activate their SigMail account.

Refer to Chapter 2 ('Activating your SigMail Account (Registration)') above.

This chapter outlines the details of the Registration Completion steps ('Create your SigMail account' and 'Setup your security questions') that the invitee will need to complete to activate their SigMail account.

15.6 Managing Physician & Staff Invitations (Resend / Revoke / Remove)

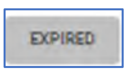
As mentioned, when an invite is sent to a Physician or Clinic Administrator, a row for the new contact is added to your 'Manage Members' directory.



- The status of the row will initially be '*Pending*' (as shown in the 'Status column).

- Once the invitee has completed the Registation steps to active their SigMail account, the Status will become '*Active***'**:

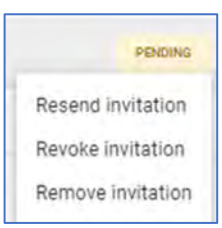
- However, if the invitee fails to complete the Registration process after 30 days, the status of the invitation row will automatically change to '***Expired***'.



After the issue has been issued, there may be a need to:

- ***Revoke*** (or recall) the invitation
- ***Resent*** the invitation
- ***Remove*** the invitation

- These functions can be found by clicking on the Status column button of the Manage Member row.



NOTE

Please refer to ***Section 11.4.7 ('Managing Patient Invitations')*** *above. This section discusses how to monitor* *__Patient invitations__* *using* *__the 'Circle of Care' directory screen__*. *The steps to Revoke, Resend and Remove invitations are included in this section.*

Although Physician and Staff invitations are managed on a different screen ('Manage Members' rather than 'Circle of Care'), those same steps can be followed to Revoke, Resend or Remove a member on this screen.

16 SigMail Accounts with Multiple Groups

Most SigMail users belong to only a single 'Group' within their organization and play a single role.

As such, when you are onboarded to the SigMail system (by a back-office SigMail Administrator), your account profile is associated to an appropriate single Group (e.g. 'Admin Group')

In some cases, a user may have multiple roles within their organization, and would like to manage their SigMail Members, mailboxes and messages according to each separate Group (or role).

SigMail supports an account belonging to multiple Groups.

- If your account is configured to more than one Group (by a SigMail Administrator), you can then toggle between two different 'views' of your account.
- At the top of each of the SigMail windows, you are provided with a '***Group***' field.

  - To switch between your SigMail 'Group' views, click on this field to open the drop-down list.
  - If you belong to more than one Group, this drop-down list will have more than one value listed.
- Select the alternate 'Group' you would like to view on the drop-down.

- The screen content will then be refreshed and will now show the SigMail data from your account that applies to that Group instead.