

SigMail Physician's User Guide



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www.sigmahealthtech.com

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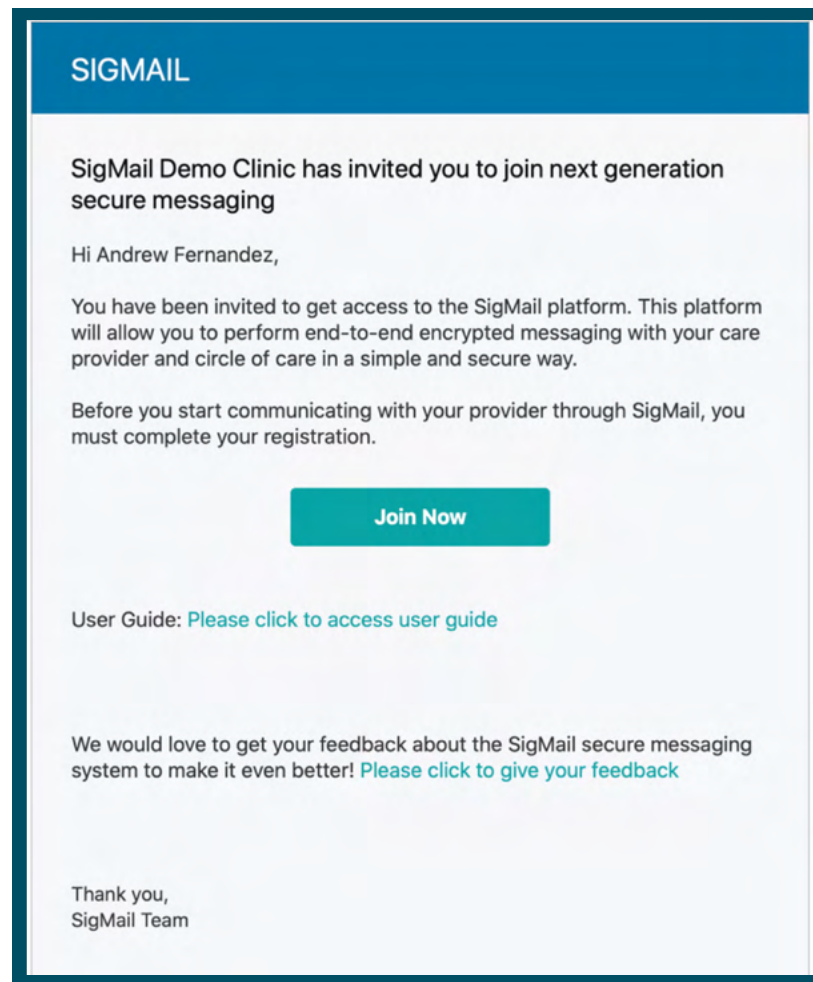
Support

01

Starting with SigMail

Welcome to SigMail, a HIPAA compliant, end to-end encrypted web-based messaging and video system to allow care providers to communicate with each other and their patients. We have focused on creating open communication to put patients at the secure centre of their circle of care. SigMail can be used to communicate and send all types of personal health information (PHI) from healthcare office to office to provider to provider to patient, in a safe and secure fashion. It can improve patient experience, and improve office efficiency through the use of asynchronous communication. Secure messaging is much more efficient than current tools like telephone calls and fax machines, and may improve staff morale and office work-flow.

You will receive an email from noreply@sigmail.ca with the subject, "SigMail <clinic name> has invited you to join the secure messaging platform" inviting you to join, click the [Complete My Registration] tab. If you haven't received this email, check your spam folder, or the promotions folder in Gmail.



02

Starting with SigMail

Step 1- enter a username which will be used for login purposes only. Enter a password- at least 12 characters long. For ease, you may choose to use your email address as your username. Remember to keep both the username and password securely as they are used to safeguard your account.

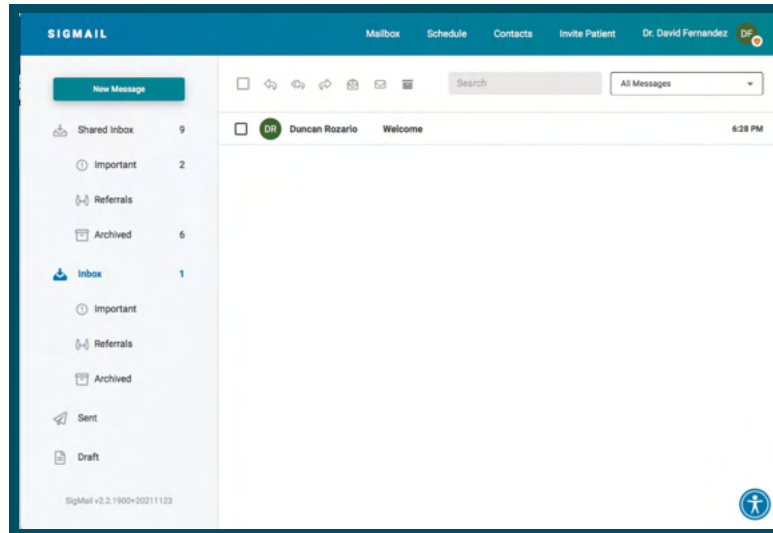
Step 2- answer the security questions. As this is a secondary safeguard to allow a forgotten password to be reset, it is vital that you record these safely. You can click on the [eye] icon to see the text that you are entering. If you forget your password, you must know the answers to the security questions otherwise you will not be able to access your account. Given the highly secured nature of the system, we do not have the ability to provide access to the system without your password or answers to the security questions. You will then receive an email telling you that your SigMail account is now active and ready for login.

You will now be able to login at www.sigmil.ca

03

Setting up your Account

After you login, you will land on the Mailbox page. SigMail looks and behaves very much like conventional email, but no external emails are allowed in, and no emails leave the system. Messages travel in the system always encrypted and remain encrypted. As you can see, you will have access to the shared clinic inbox for patient messages, and your own personal inbox.



Click on your name at the top right and select [Manage Members]. You will now want to add the other members of your clinic.

Types of Accounts:

Admin Physician - for the main physicians- can create admin, physician+, physician, staff, patient accounts, change clinic details, activate and deactivate accounts. Full email access. PRO fee account

Admin Staff - for the administrative staff, like the Admin Physician have rights to deactivate users, change clinic details, and do high level clinic changes. This person gets a default specialty as "Administrative Staff"

Physician+ - is listed in the physician directory, can create physician+, physician and patient accounts and has access to premium features such as HRM. Full email access. PRO fee account

Physician - is listed in the physician directory, can create patient accounts. Full messaging access. STD fee account

Staff - can create physician+, physician, staff, and patient accounts. Full messaging access, are "Administrative Staff". PRO fee account

Patient(Guest) - can receive and reply to emails from the clinic, and send and receive attachments. No fee Guest account.

04

Typical Clinical Structure

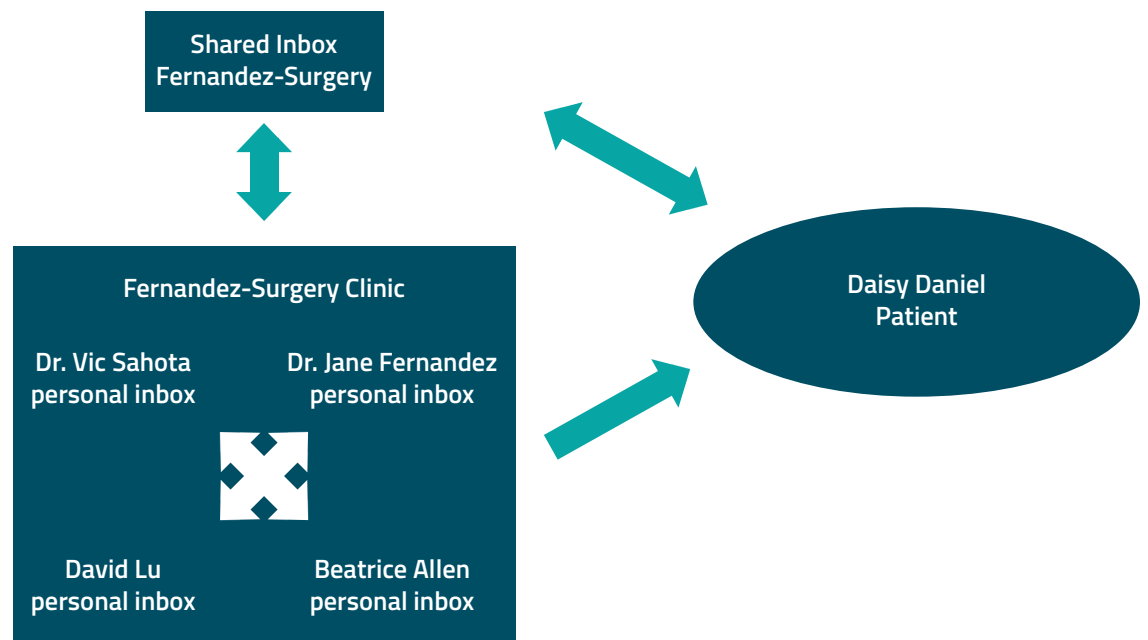
An administrator can create one or more separate groups for their clinic as needed. A new group is like a different clinic- physicians and staff in one group will not be able to message patients in another group.

Physician and staff accounts have access to the shared clinic inbox, and their personal inbox. Messages can be sent from any PRO or STD user, to any other PRO or STD user or clinic shared inbox.

Patients can reply to any message from a PRO or STD user, but their messages are sent to the clinic's shared inbox only so that all members of the clinic can see the message and respond appropriately.

Example

Dr. Jane Fernandez is a physician and an Administrator and has setup a SigMail system for her clinic named: **Fernandez-Surgery**. She has an associate physician, Dr. Vic Sahota, an office manager David Lu, and a nurse Beatrice Allen. They have created a patient guest account for Daisy Daniel.



05

Typical Clinical Structure

Clinic staff and physicians can communicate with each other, and other clinics and their staff and physicians using their personal inbox. When staff or physicians message patients, patients can reply only to the Shared inbox to which all clinic staff and physicians have access. This ensures that everyone can see and respond to patient concerns as needed.

Suggested Workflow

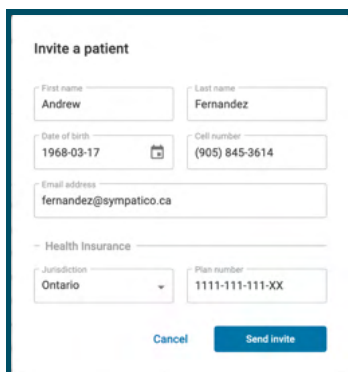
Most issues will be dealt with by your clinic staff who will monitor the Shared inbox. If there is a message from a patient that requires the physician's attention, [Reply] or [Reply All] to the patient message, and then cc. the physician. This will send a message to the physician which has the patient's username in the header and is very easy to respond to. At all times, patient's messages go to the shared inbox.

Each member of the clinic should have an account. Messages are handled like email, read receipts, send acknowledgements are present. Message cannot be deleted as they may contain personal health information (PHI), but they can be archived to move them out of the inbox. Messages can be moved to a physician's EMR via PDF or via upcoming integration with OntarioMD's Health Report Manager (HRM).

06

Create Patient (Guest) Accounts

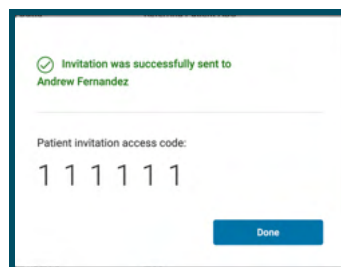
Once the clinic structure is completed, you are ready to invite patients. Click the [Invite Patient] tab and then enter their First Name, Last Name, DOB, HC number, email address and cell number and click [Send Invite]. Cell phone number is optional, but we encourage you to provide it to allow patients to use 2 factor authentication (2FA). You can select the province or territory of the patient's health coverage, or details about private insurance. Your patient will receive an invitation at their email address to create a SigMail account and can use their cellphone number for 2FA. Remember to remind your patients that the invitation may be in the spam folder or the promotions folder in Gmail. As a security measure, when the patient account is created, a patient invitation access code which is the last 6 numbers of their health number is created. They require this to set up their account. If they do not have a provincial health card, a random 6 digit security sequence is created and displayed on your screen. This must be communicated to the patient verbally or in writing as they need this to create their account. For later reference, this code is listed on the **Manage Members** page.



The 'Invite a patient' form contains the following fields:

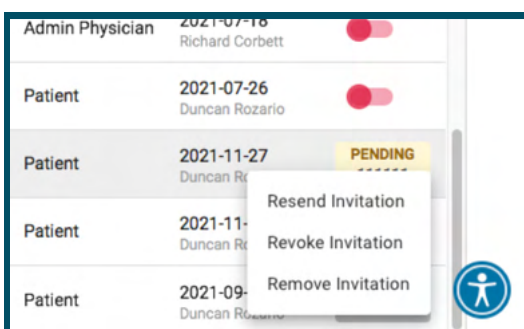
- First name: Andrew
- Last name: Fernandez
- Date of birth: 1968-03-17
- Cell number: (905) 845-3614
- Email address: fernandez@sympatico.ca
- Health Insurance: Ontario (Jurisdiction), 1111-111-111-XX (Plan number)

Buttons: Cancel, Send invite



Once your patient has completed their account creation, their status will change on the **Manage Members** page from [Pending] to completed with a blue slider bar.

On this Manage Members Page, accounts can be deactivated if needed. In addition, if one clicks on a PENDING status icon, one can resend, revoke, or remove invitations.



Admin Physician	2021-07-18	Richard Corbett	<input checked="" type="checkbox"/>
Patient	2021-07-26	Duncan Rozario	<input checked="" type="checkbox"/>
Patient	2021-11-27	Duncan R...	PENDING
Patient	2021-11-	Duncan R...	
Patient	2021-09-	Duncan R...	

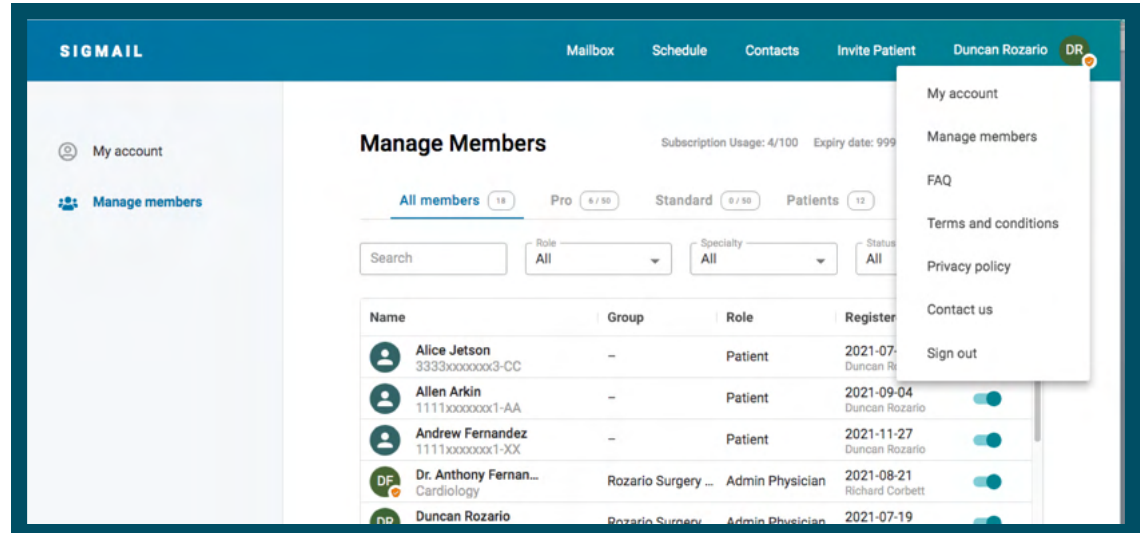
Context menu for the pending patient:

- Resend Invitation
- Revoke Invitation
- Remove Invitation

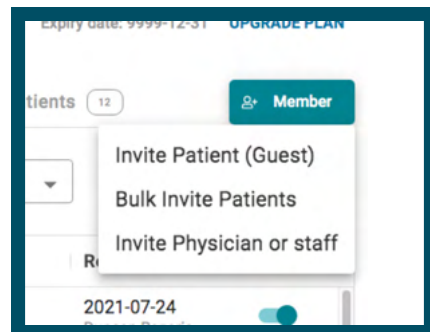
07

Manage Members

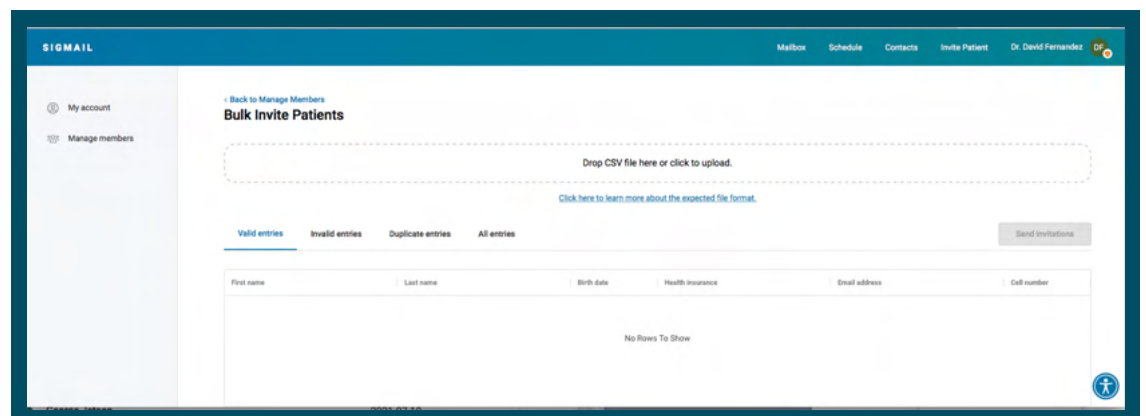
Patient accounts can be added by selecting the [Invite Patient] tab at the top of the screen, or by selecting the [+ Member] tab.



This [+ Member] tab allows one to create Patient Accounts, Bulk Invite Patients, and Invite Physician or staff



The Bulk Invite option allows the SigMail system to send out up to fifty patient account invitations at a time by importing an Excel Spreadsheet with the required information.



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Manage Members

An Excel spreadsheet with patient demographics in the CSV format listing: First name, Last name, Birth date, Health insurance#, Email address, Cell number can be uploaded to allow SigMail to automatically send out invitations to join the system

Batch script Oscar

In the Oscar EMR, the Administration Reports Query By Example allows one to enter this script to automatically generate a list of patients, where the demographic_no needs to be adjusted. The example will generate a list of all patients from demographic #1 to #50

```
select  
first_name,last_name,concat(year_of_birth,'-',month_of_birth,'-',date_of_birth) as  
dob,hc_type,concat(hin,"-",ver) as hin,email,phone FROM demographic WHERE  
(demographic_no >=1 and demographic_no<=50)
```

09

Sending Messages

To send a message to a patient, one can either click [New message] and enter the patient name, or select (Contacts) and then [*Circle of Care] where all of the clinic's patients are listed. All clinic staff and physicians can message all patients in the clinic's circle of care.

Messages can be sent in two separate ways.

1. One can click [New Message] and start typing the name of the recipient. You will notice that physicians have their specialty listed after their name, staff have the term [Administrative Staff] listed after their name, and patients have a partially anonymized health card number listed to ensure that you are selecting the correct patient.
2. One can click- [Contacts], and then select [Physician] directory, [Group Contacts], [Client Contacts], or [* Circle of Care], select one or more recipients, and then click the icon in front of the Search tab to create a new message.
3. Sent messages are stored in the [Sent] folder. The time and date that they were sent is recorded. A green checkmark in front of the recipient indicates that the message was read. Messages can be unsent in the first 7 days by clicking the Recall button.

Contacts

Selecting the [Contacts] button give you access to the listings of :

Physicians- all physicians on SigMail

Group Contacts- the names of all offices or clinics on SigMail with the name of their shared inbox

Client Contacts- frequent recipients you message

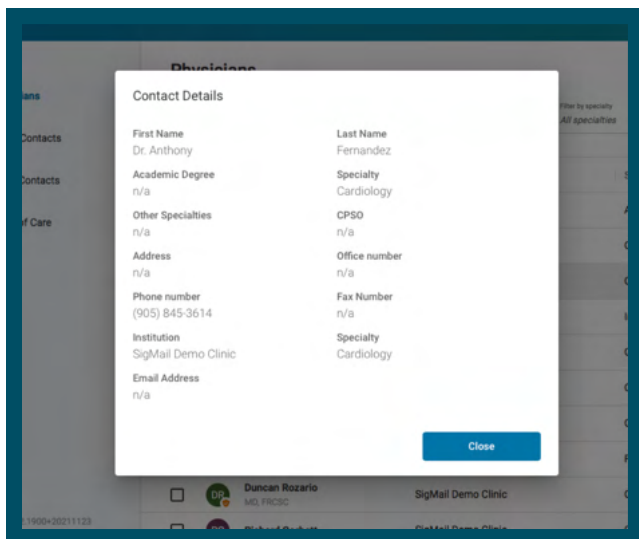
Circle of Care- all of the patients in your circle of care

	Name	Institution	Specialty	Other Spe...	Phone	City	Province
<input type="checkbox"/>	Aaron Jolly MD FACC FASNC	SigMail Demo Clinic	Cardiology		(111) 111...		
<input type="checkbox"/>	David Allen	SigMail Demo Clinic	Gynecologic surgery		(905) 845...		
<input type="checkbox"/>	David Fernand...	SigMail Demo Clinic	General surgery		(905) 845...		
<input type="checkbox"/>	David Rozario	SigMail Second Demo ...	Dermatology		(905) 845...		

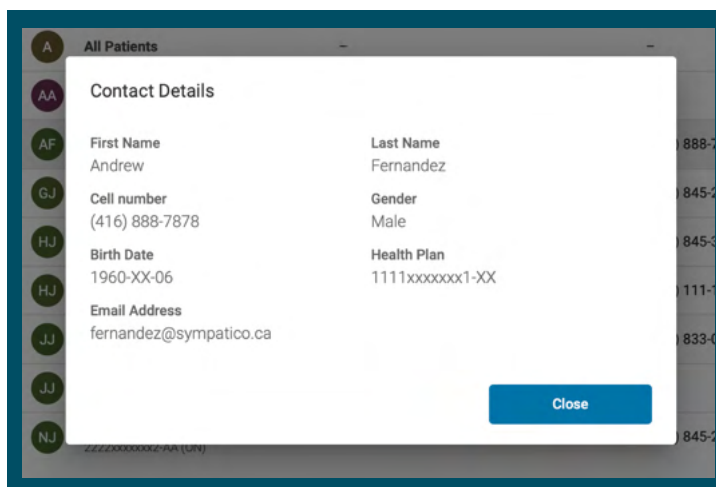
10

Sending Messages

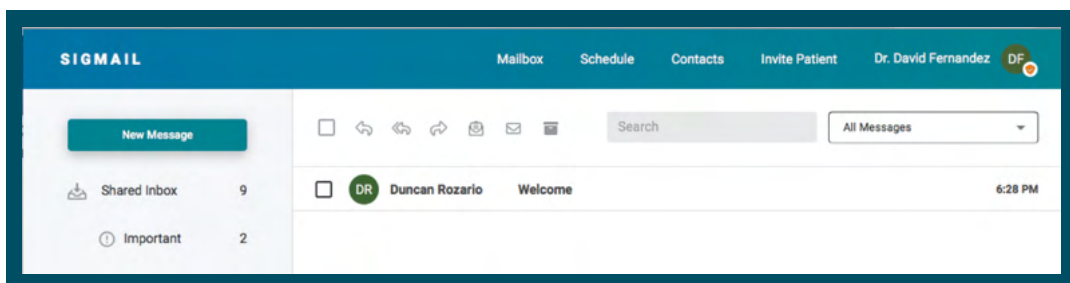
From this page, clicking on the name of a physician brings up their contact info



From this page, clicking on the Circle of Care listing, double clicking on a patient name brings up demographic information



Mailbox Icons

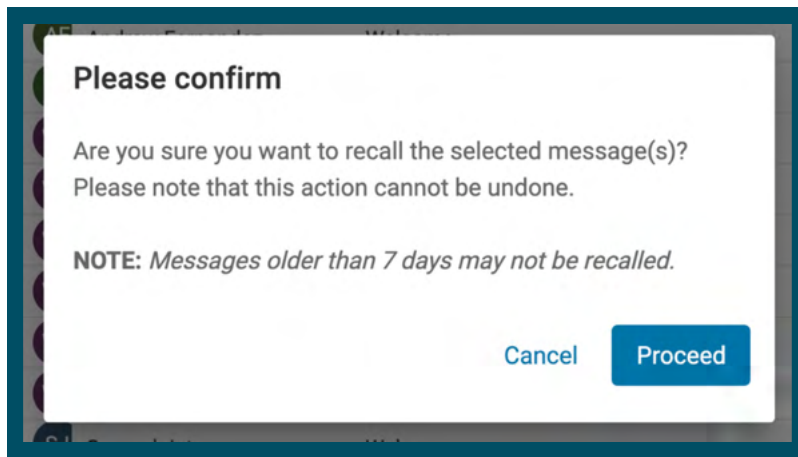
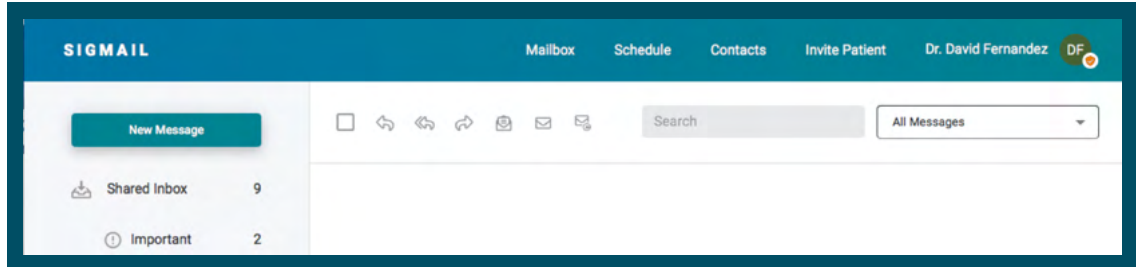


After the [New Message] button, the icons are: select all, reply, reply all, forward, mark read, mark unread, and archive.

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Sending Messages

On the sent mail screen, the archive button is replaced with a Recall button which allows you to unsend messages if sent within the last 7 days.



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My Account Settings

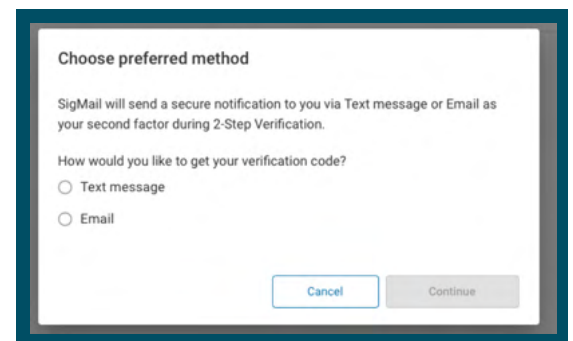
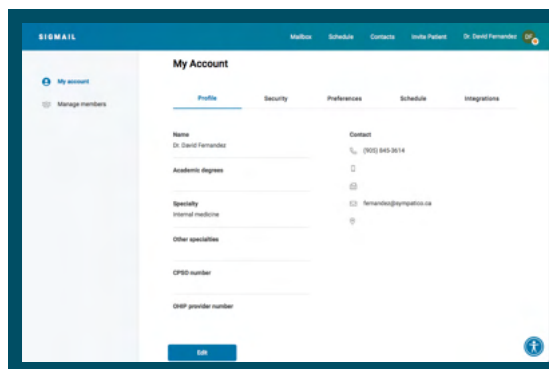
Clicking on your name at the top right of the screen allows access to settings. The **My Account** tab allows you to change your account **Profile** information. Only clinic Administrators can change the names of account holders.

The **Security** tab allows you to enable 2 factor authentication (2FA), change passwords and security questions. The username and password needs to be entered to change any of these settings. 2FA options include sending the 7 digit code to- SMS text message, or email address.

The **Preferences** tab allows you to toggle on or off, whether your external email receives a notification when you receive a new SigMail message from your private inbox or shared inbox. You can also change the message signature that is automatically added to the end of your messages.

The **Schedule** tab allows you to schedule your normally worked hours in a week so that staff know when you are available to schedule video visits.

The **Integrations** tab allows one to change settings for integration in the Oscar EMR, and check on Health Report Manager integration status



13

My Account Settings

Manage Members

The **Manage Members** tab allows one to add new physician and staff accounts, deactivate accounts, resend invitations, revoke invitations or remove invitations.

Before accounts are active, if you click on the Status box of the invitation (which could say [Expired] or [Pending]), you can resend an invitation, revoke an invitation, or remove an invitation.

SIGMAIL Mailbox Physicians directory Invite Patient Dr. Duncan Rozario

Manage Members Subscription Usage: 7/100 Expiry date: 9999-12-31 [UPGRADE PLAN](#)

All members 17 Pro 9/50 Standard 0/50 Guests 8 Member

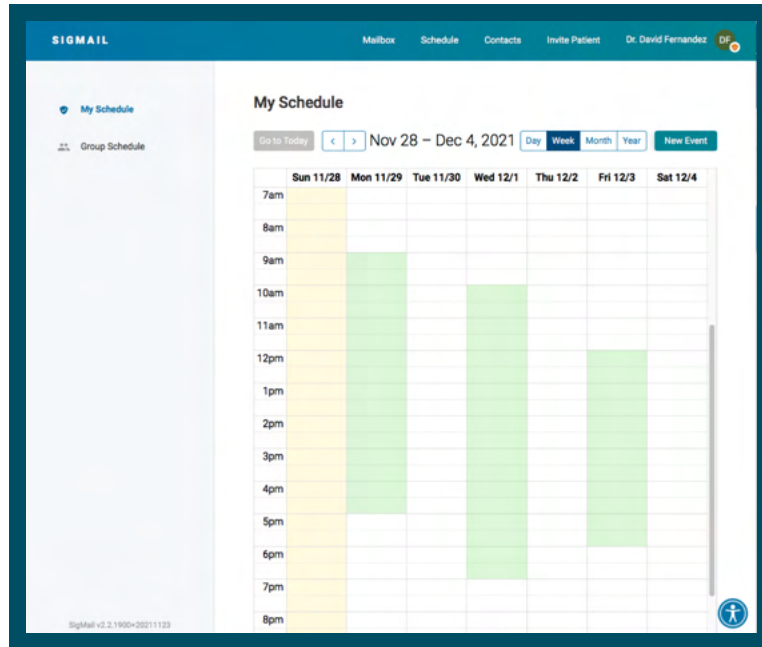
Search Role All Specialty All Status All

Name	Role	Email	Specialty	Status
Mona Jasuja	Physician+	monajasuj...	Pediatrics	Active
Gopal B...	Physician+	gopal@jpb...	Cardiac su...	EXPIRED
Jennifer Su...	Staff	jsutton@k...	Admi...	Resend Invitation Revoke Invitation Remove Invitation
Janet Patterson	Patient	petterson...		
Oswald Jones	Patient	oswald@m...		

14

The Schedule Tab and Video Visits

The Schedule Tab at the top of the screen allows one to see when care givers are scheduled to be working to allow one to add video visits



To Add a video visit, select [New Event], fill in the required information and select [Submit] to schedule the visit and automatically send a message to all recipients/

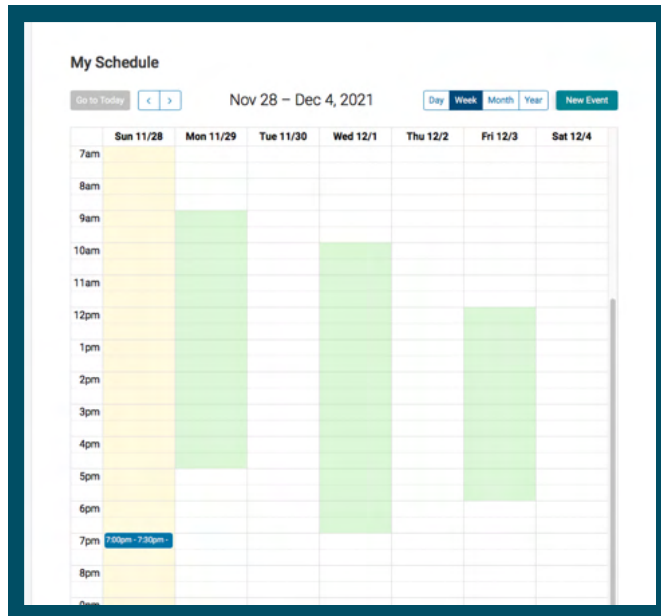
One can add multiple recipients, add reminders, flag messages as important or billable, and make an interaction audio, or video by selecting the [Video Meeting] box

The screenshot shows the 'New Event' form in SIGMAIL. The form includes fields for Title, Attendees, Date, Start time, End time, Description, Reminder, and Notify by. The 'Video meeting' checkbox is checked.

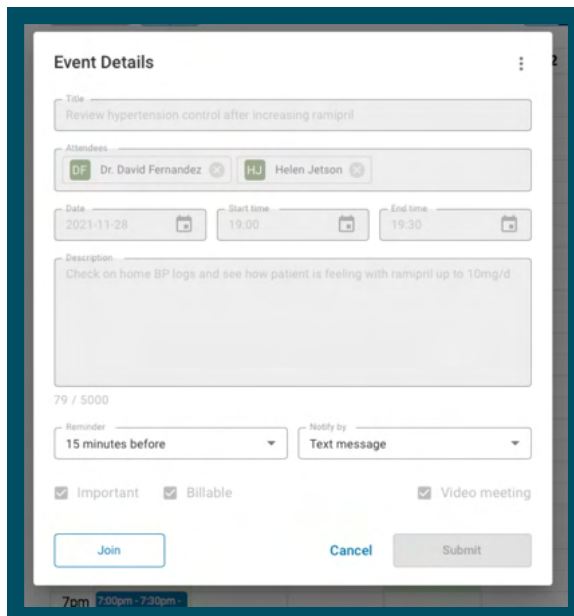
The scheduled video visit will now show on the schedule

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The Schedule Tab and Video Visits



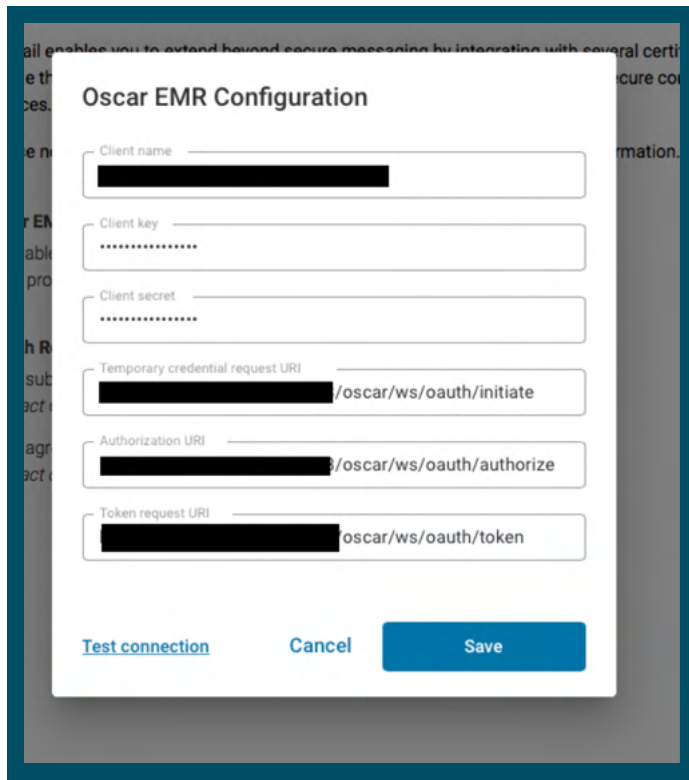
By selecting the event, and clicking join, one can start the video visit.



Appendix

Integration into Oscar EMR

We directly integrate into the Oscar EMR. By selecting the [Integrations] tab on the My Account screen one can select the [Edit] button for Oscar EMR and enter the appropriate information from the Oscar EMR Administration Integration API/Connections REST Clients. SigMail technical support can assist with this.



The image shows a screenshot of a web application's configuration dialog box titled "Oscar EMR Configuration". The dialog box is white with a dark blue border and contains several input fields and buttons. The fields are: "Client name" (with a blacked-out value), "Client key" (with a masked value of dots), "Client secret" (with a masked value of dots), "Temporary credential request URI" (with a value of [redacted]/oscar/ws/oauth/initiate), "Authorization URI" (with a value of [redacted]:oscar/ws/oauth/authorize), and "Token request URI" (with a value of [redacted]oscar/ws/oauth/token). At the bottom of the dialog box, there are three buttons: "Test connection" (a blue link), "Cancel" (a grey button), and "Save" (a blue button).

Supports

If you have problems with the system that your physician's office are not able to resolve, you can email us at support@sigmahealthtech.com via your external email.