

# INDIVICA

## Communicate

This tool allows you to send messages and chart elements via a secure portal to patients, colleagues, and third parties (insurance, lawyers, etc.)

### I. Setup users with Communicate access

As an administrator, go to **Admin > Assign Role to Provider**. For each user you wish to grant access, select one of the new Communicate roles and Add it to their list of roles.

		Name:		Search
Provider-Role List				
ID	First Name	Last Name	Role	Action
444441	Adam	Arquette	admin	Add - Update - Delete
444441	Adam	Arquette	CAISI ADMIN	Add - Update - Delete
100006	Adam	HRMadmin1	Case Manager	Add - Update - Delete
100006	Adam	HRMadmin1	Client Service Worker	Add - Update - Delete
100009	Adele	HRMadmin2	Clinical Assistant	Add - Update - Delete
100009	Adele	HRMadmin2	Clinical Case Manager	Add - Update - Delete
100009	Adele	HRMadmin2	Clinical Social Worker	Add - Update - Delete
100005	Alan	Administrator	Communicate Admin	Add - Update - Delete
100005	Alan	Administrator	Communicate User	Add - Update - Delete
			counselor	Add - Update - Delete
			doctor	Add - Update - Delete
			receptionist	Add - Update - Delete

**Communicate User** allows users to access the Communicate module and view communications made by other users. Most users will have this role.

**Communicate Admin** grants the same rights, but also allows users to change clinic default configuration regarding communicate. You should set yourself as an admin, at least one is required.

Once you've selected a new role for the relevant staff, it should look something like this. Note that each staff member **MUST** have a 'base' role (doctor, nurse, receptionist, etc) on top of any additional permissions.

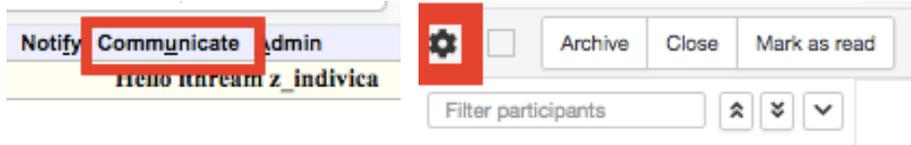
Provider-Role List				
ID	First Name	Last Name	Role	Action
444441	Adam	Arquette	admin	Add - Update - Delete
444441	Adam	Arquette	doctor	Add - Update - Delete
100006	Adam	HRMadmin1	admin	Add - Update - Delete
100006	Adam	HRMadmin1	doctor	Add - Update - Delete
100009	Adele	HRMadmin2	admin	Add - Update - Delete
100009	Adele	HRMadmin2	Communicate User	Add - Update - Delete
100009	Adele	HRMadmin2	doctor	Add - Update - Delete
100005	Alan	Administrator	admin	Add - Update - Delete
100005	Alan	Administrator	Communicate Admin	Add - Update - Delete
100005	Alan	Administrator	doctor	Add - Update - Delete



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## II. Configuring Communicate

1. Click **Communicate** from the main schedule screen, then click the gear in the top left corner to access the configuration tools.



2. In the bottom left, click **Directory** and update your clinic information as desired.

**Admin**  
Conversations  
**Directory**  
Messages  
Search

**Clinic name**  
Indivica HQ

**Clinic phone**  
1-855-672-2878

**Clinic address**  
4100 Yonge St., Suite 505  
Toronto, Ontario  
M2P 2B5

**Update** **Deregister** Deregister if you no longer wish for providers in your searches performed by providers via the Indivica

3. If you wish to allow other clinics to contact your providers, you'll need to register them to the Communicate directory. Either individually or by role select any providers you want to make available publicly.

Provider registration

Search: doct

Search results

- Providers
  - oscardoc, doctor
- Roles
  - doctor

Expand all Collapse all Close

**Note:** As this is an early version of Communicate, you can not currently remove registered users from the directory or restrict them to certain groups (FHO,FHT,etc) Please use caution when registering users during this early stage. Thank you for your patience as we improve Communicate.



# I N D I V I C A

Once you've chosen some roles/users to add to the directory, check your final selections off and click 'Register.' Selected users will now be visible to other clinics using Communicate with Indivicare.

## Provider registration

Search by provider name, role, group... Sources

include billing number [Register](#)

<input checked="" type="checkbox"/>	Remove	First name	Last name	Billing number
<input checked="" type="checkbox"/>	Remove	ithream	z_indivica	
<input checked="" type="checkbox"/>	Remove	David	Dolittle	700000
<input checked="" type="checkbox"/>	Remove	Donald	Doless	700001
<input checked="" type="checkbox"/>	Remove	Ken	Kimble	700002
<input checked="" type="checkbox"/>	Remove	Leon	Lebron	700003
<input checked="" type="checkbox"/>	Remove	Marcus	Welby	700005

- Next click **Messages** to set up some default message templates for the clinic.

### Demographic invitation message

Placehol... Templates

**Admin**  
Conversations  
Directory  
**Messages**  
Search

This is an example template, if you have any questions or concerns please contact support@indivica.com

Once you've set your defaults, click **Save** in the top right.

Note that these templates will be the default for the clinic, but each user can set their own if they wish.

**Note:** The template placeholders are a bit sparse at the moment, but more options will be added shortly. Make sure to set an alternate method of reaching your clinic in case the patient loses their PIN or you have the wrong email.



# I N D I V I C A

5. You can make other changes to things like the default provider colour, toolbar position, and default search parameters, but I'd recommend moving on for now as those options won't make a lot of sense yet. Click the Home button whenever you wish to return to your dashboard.



## III. Communicate with a patient

1. Before you can securely communicate with a patient, you'll need to have a valid email, and you'll need to give them their **patient PIN**. You can find each **patient's PIN** and current email in their demographic record.



You can set custom pins for each patient, but they must be 8 characters or more. We strongly advise using unique pins for each patient, and if you allow patients to select their own pin please advise caution as it grants access to any data you share with them.

**Note:** At present, it's up to you to share the pin with the patient. In future, you'll be able to add the pin to labels and Rich Text Letter templates to make this a bit easier, but you should still always make sure to give the patient pin ONLY to the relevant patient or their guardian.

2. To open a new conversation with a patient, open their **eChart** and click the + next to the new communicate panel.



# I N D I V I C A

3. Fill in the subject line (1) for your communication. This will appear in the initial email as well as being the name of this particular conversation. This does not require a pin to view, so please do not put sensitive information here.

Subject	1	<input type="text" value="This is the subject"/>		
PIN	2	<input type="text" value="3QCGM6BF"/> <input type="button" value="Generate"/>	5	<input type="checkbox"/> disable PIN
Demographic	3	<input type="text" value="TEST, PATIENT"/> <input type="button" value="x"/>	6	<input checked="" type="checkbox"/> add as participant
Email	4	<input type="text" value="support@indivica.ca"/>		

4. You likely won't use most of the additional options here right away, but you can also view or regenerate the **conversation pin** (2), remove the linked demographic (3), view or edit the patient email (4), disable the pin requirement for this communication (5), or remove the patient as a participant (6) so they will not be notified of this conversation.

**Warning:** Disabling the pin for a communication is potentially dangerous. Please do not share medical information in conversations with disabled pins, as they are not protected. If you send such a message to the wrong email it could be trouble.

5. If required, edit the default message template or select a new template for this message. This does not require a pin to view, so please do not put sensitive information here.

Email	<input type="text" value="support@indivica.ca"/>
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← →   Placeholder...   Templates
This is the text that appears in the email with the secure link. If you have any issues please contact support@indivica.ca



# I N D I V I C A

6. Add any additional participants that may be required. If another Indivicare provider would be interested in this conversation (say, their primary physician or an in house specialist) you can add them via the Search for Participants menu (1). If a third party would be interested (lawyer, insurance, non-Indivica colleague, etc) you can add them by email (2).

## Search for participants

 Sources ▾

Add local providers as watchers

## Add by e-mail address

Note: Third parties added via email require the **conversation pin** in order to access the conversation. You should never give a **patient pin** to a third party.

7. If you have added any third parties via email, you'll need to set an introductory message for them as well (unless you're satisfied with the default message that appears.)
8. Once you've got all the participants sorted out, you can add an initial message to the conversation. This is private, and requires a pin for the patient and any emailed third party to view, so it's okay to put sensitive information here. Just fill in some text (1) and add any relevant attachments (2)

## Add message to conversation

 1 2  

9. Once everything is filled out, all that's left is to send the message off by clicking create in the top right corner.

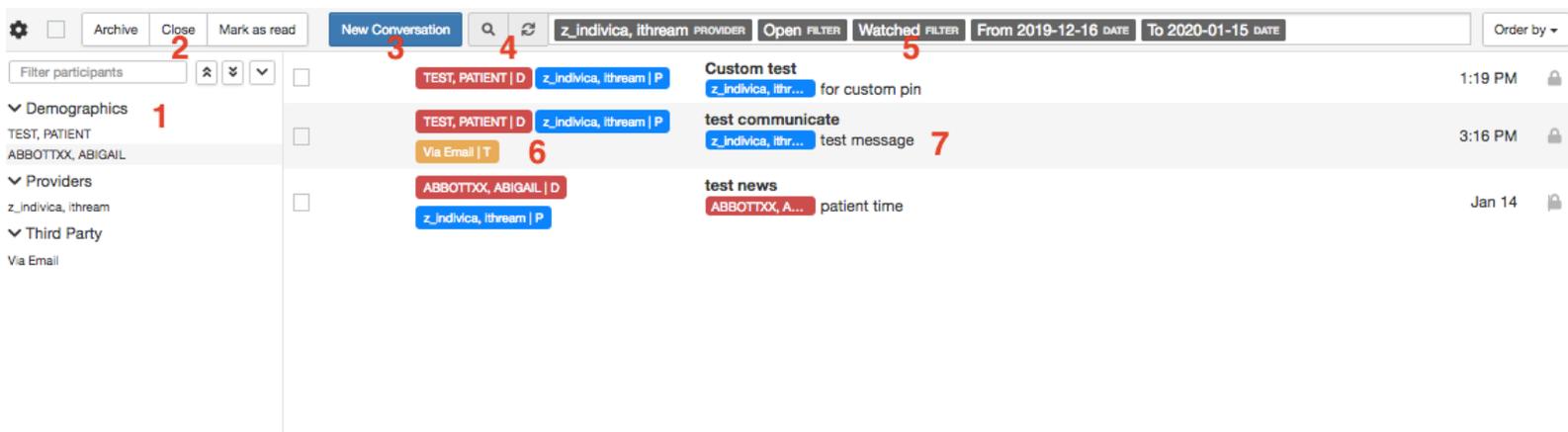

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## IV. Reviewing communications

1. Once a conversation has started, you can access it via the **Communicate** button at the top of your schedule screen. Just like your inbox, this will light up red and show a counter when a conversation requires your attention.



2. On your communicate dashboard, you'll have access to all of the conversations relevant to you right away.

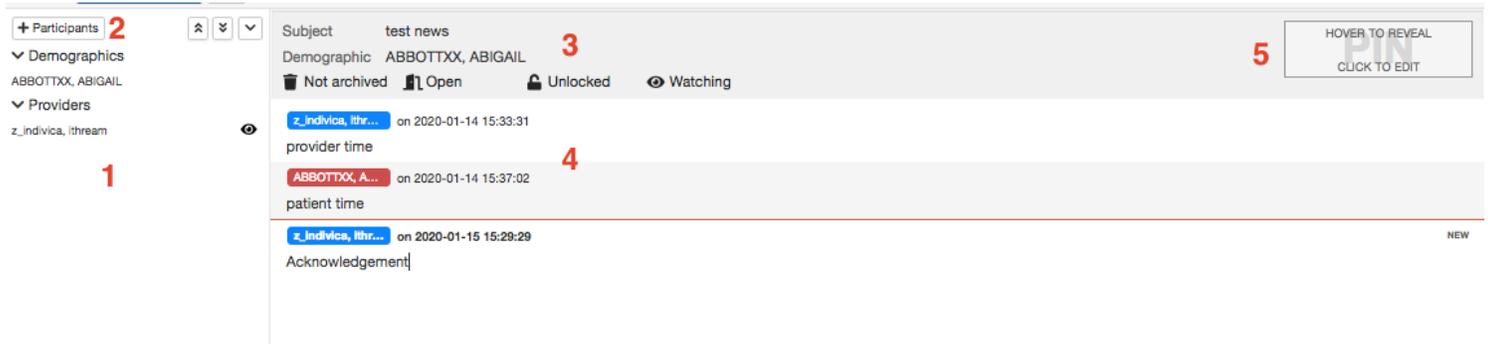


- (1) If you'd like to filter it down to conversations involving a specific participant, just click their name on the left.
- (2) Similar to the inbox, you can take mass action with your communications by checking them off and using the buttons in the top left to archive, close, or mark them as read.
- (3) You can create a new conversation here.
- (4) If you'd like to look for older messages, ones you've stopped watching, or messages for other local providers you can do so by changing the filters...
- (5) ... or just removing some filters by clicking on them.
- (6) Each conversation shows a colour coded list of participants. The default colours are **PATIENTS**, **PROVIDERS**, and **THIRD PARTIES**.
- (7) The subject of each conversation as well as the latest message are shown here



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3. To access a full conversation, click near the subject/message.



- (1) You can see a list of participants for this conversation.
- (2) You can add new participants if you've forgotten someone, or a new provider becomes relevant.
- (3) You can review/edit the subject and attached demographic, as well as alter conversation settings. **Archiving** is used to mark old conversations without closing them. **Open** conversations can be continued, closed conversations cannot. **Locked** conversations can only be viewed by **participants** (1). **Watching** means you will continue to get updates about this conversation. Toggle this off if you are no longer interested, but the conversation will continue without you.
- (4) Messages will appear in order, from oldest to newest descending. At this time messages cannot be deleted or edited. New messages since you last opened the conversation appear below the red line.
- (5) The **conversation pin** can be accessed or altered by clicking this pin field. Remember, never give out the patient pin to third parties. Third parties contacted via email must have the **conversation pin** to participate.

4. If required, you can resend messages to the demographic by clicking their name at the top of the conversation and then choosing 'resend'.



5. The message box works the same as it does when creating a conversation, but you must click the 'send' button once you've finished typing rather than 'create' in the top right corner.

