



BRIGHTSQUID

**SECURE-MAIL**

**USER GUIDE**

# CONTENTS

<b>Administration of Your Secure-Mail Account:</b>	<b>3</b>
<b>Administrative Subsections:</b>	<b>3</b>
Personal Details	3
Clinic Details - Directory listing	3
Clinic Members	6
<a href="#">Deleting a team member:</a>	8
Subscription	8
Training	9
<b>Secure-Mail User Personal Preferences &amp; Tools</b>	<b>10</b>
<b>Configuring Secure-Mail to Maximize Efficiency</b>	<b>14</b>
How to Login - Clinician or Office Staff:	14
Reset your login password:	14
Sending and Receiving Messages (Patients and Colleagues)	16
Composing, Sending, and Attaching Files to a Message	16
<a href="#">Step 1 - Click the green compose button.</a>	16
<a href="#">Step 2 - Address your Message</a>	16
<a href="#">Step 3 - Compose your message Subject Line and Body</a>	17
<a href="#">Step 4 - Attach Files (Optional)</a>	17
<a href="#">Step 5 - Customize the email notification (optional)</a>	19
<a href="#">Step 6 - Send the Message</a>	19
Inviting New Users to Secure-Mail:	21
Inviting an External Professional Colleague to Secure-Mail:	21
Preparation Activities:	23
Receiving Messages and Accessing Attachments	23
Downloading attachments:	24
View Attachments in Secure-Mail:	25
<b>Appendix A - Configuration and use of Clinical Features</b>	<b>26</b>
Virtual Front Desk - Shared Inbox Best Practices	26
Message Recall:	26
Preparation Activity:	26
Read Receipts:	28
Preparation Activity:	29
<b>Appendix B - Getting Started With <a href="#">Secure-Mail: Quick Start Guide</a></b>	<b>30</b>
Introducing Secure-Mail:	28
Getting Started	28
<a href="#">STEP 1: Fill in remaining Clinic Details to complete your directory listing.</a>	30
<a href="#">STEP 2: Create user accounts for staff and physicians in the office:</a>	31
<a href="#">STEP 3: Configure your Virtual Front Desk by assigning your front desk team to Shared Inbox.</a>	31
<a href="#">STEP 4: Invite Patients to Use your Secure-Mail Virtual Front Desk</a>	33
<b>Appendix C - Toolbar Overview</b>	<b>34</b>
<b>Appendix D - Support Resources</b>	<b>35</b>
<b>Appendix E - Who should get access to your Shared Inbox?</b>	<b>36</b>
Preparation Activities:	36
List your team members who will be assigned to the Shared Inbox:	36
Administering your Virtual Front Desk:	36
Private messaging considerations:	
<b>Appendix F - Secure-Mail Virtual Front Desk Workflows</b>	<b>37</b>
Patient Requests an Appointment via the Virtual Front Desk:	37
Patient Contacts the Virtual Front Desk with a new Health Concern	37
Patient Concern is Forwarded to a Clinician	39

# Administration of Your Secure-Mail Account:



## The power of a united clinic:

Brightsquid Secure-Mail user accounts are arranged into groups we label as a Clinic. Your clinic members may be arranged and sorted by geographic area, internal team, task, or some other custom specification that allows them to continue to operate as a functional unit with one Shared Inbox.

All approved professional users must be a member of a clinic. Each Clinic will have one or more administrators who manage the various settings and tools that govern how the clinic user Secure-Mail. The user that first sets up a clinic Secure-Mail account is an administrator by default, this can be changed later.

Clinic level administrative tools are accessed via the Settings link that can be found at the bottom of the grey left-hand navigation bar in your Secure-Mail account.

If you do not see the grey toolbar or settings link, click the menu toggle icon at the top left corner of your Secure-Mail account.



Menu toggle icon (sometimes called a “Hamburger Menu”)



The Settings Icon

## Administrative Subsections:



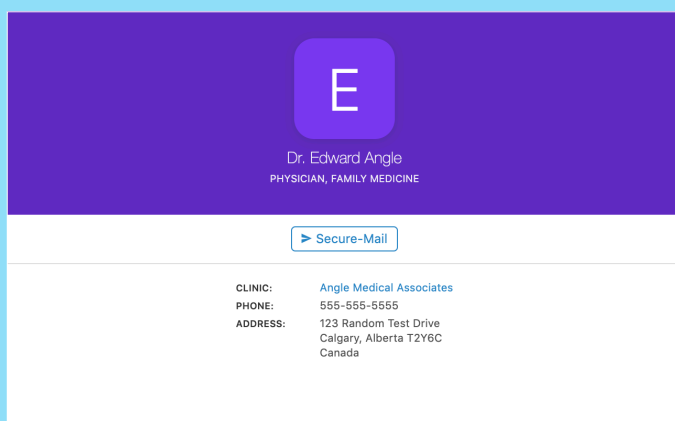
Depending on your clinic’s subscription there are 4-5 tabs/sections in the settings page.

1. **PERSONAL DETAILS** - User level preferences
2. **CLINIC DETAILS** - Viewable by all users, but only editable by clinic administrators
3. **CLINIC MEMBERS** - Viewable by all users, but only editable by clinic administrators
4. **SUBSCRIPTION** - Viewable by all users, but only editable by clinic administrators
5. **TRAINING** - For tracking completion of privacy compliance and breach prevention training. Currently only available to premium level subscribers.

## PERSONAL DETAILS

These features and functions identify individual users by role and designation. They are covered in-depth in the section; Secure-Mail Personal Preferences & Tools.

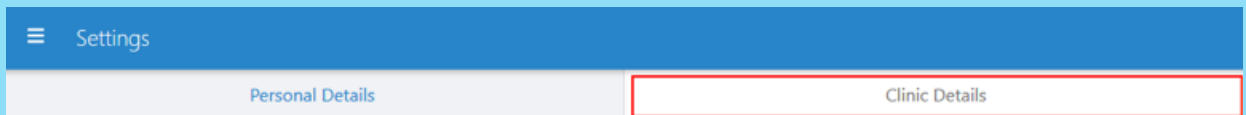
## CLINIC DETAILS-DIRECTORY LISTING



The screenshot shows a professional directory listing for Dr. Edward Angle. At the top, there is a purple header with a white letter 'E' in a square. Below this, the name 'Dr. Edward Angle' and his title 'PHYSICIAN, FAMILY MEDICINE' are displayed. A button labeled 'Secure-Mail' is positioned below the name. The bottom section of the listing provides contact information: CLINIC: Angle Medical Associates, PHONE: 555-555-5555, and ADDRESS: 123 Random Test Drive, Calgary, Alberta T2Y6C, Canada.

The Professional Directory is a global contact list for all Secure-Mail users. Each listing is a verified user with a proven identity. This security feature helps keep spammers out of your Secure-Mail inbox and provides you with the certainty that you are communicating with the right person or clinic. Here is an example directory listing:

In the Clinic Details section of your account, clinic administrators can edit the directory listing for your practice. Please note that your clinic name will appear in the Secure-Mail professional directory which will be seen by all users (clinics and patients). Make sure your listing is accurate and complete.



- **CLINIC NAME** – Enter your clinic name as patients and other clinics know it. Ensure that the name of your clinic is typed correctly here.

A form field with the label 'Clinic Name' on the left. The input field contains the text 'Fauchard Clinic'. The text is highlighted with a green selection bar.

- **CLINIC TYPE** – Click the drop down to select the most appropriate clinic type that best describes your practice. This will help categorize your clinic in the directory.

A form field with the label 'Clinic Type' on the left. The input field is a dropdown menu showing 'Medical Clinic' with a small 'x' and a downward arrow on the right side.

- **PHONE, FAX, ADDRESS** – Populate these fields with all the correct data.
- **COUNTRY** – Select your country
- **PROVINCE/STATE** – Select your province / state
- **POSTAL/ZIP CODE** – Enter your postal / zip code
- **CITY** – Enter your city

A form with several input fields. The fields are: 'Phone' with '555-555-5555', 'Fax' (empty), 'Address 1' with '123 Random Test Drive', 'Address 2' (empty), 'Country' with a dropdown menu showing 'Canada', 'Province / State' with a dropdown menu showing 'Alberta', 'Postal / Zip Code' with 'T2Y6C', and 'City' with 'Calgary'.

- **EMAIL** – Enter your main practice email address here. This field ideally should have the email address of the administrator. The eye icon symbolises that this field is hidden from public view.


Email

admin@fauchardClinic.com

- **WEBSITE** – Enter the website address of your practice.

Website

http://fauchardclinic.com

- **BUSINESS REGISTRATION ID** - The eye icon  symbolises that this field is hidden from public view. This field is used to verify your clinic and differentiate your clinic from others that might have a similar clinic name.

Business Registration Id

8927984738974

- **HEALTHCARE FACILITY REGISTRATION ID** – The eye icon symbolises that this field is hidden from public view. This field is used to verify your clinic for certain EMR integrations, and differentiate your clinic from others that might have a similar clinic name.

Healthcare Facility  
Registration Id

FAU92777374779

- **RECEIVE MESSAGES** - This feature is active by default and allows patients to communicate with your clinic via the 'Shared Inbox' by typing the clinic name in the 'To' field. To receive patient messages directly to your personal inbox, please refer to 'Personal Details' support resource. - **If this box is unchecked patients will not be able to send messages to your practice.**

Receive Messages

Allow patients to message the clinic's shared mailbox

If at any point you want to undo your changes, click 'Reset' at the bottom of the page and the changes will be reversed. **Note: if you click 'Save' first then the changes will be permanent.**

[Reset](#)

[Save](#)

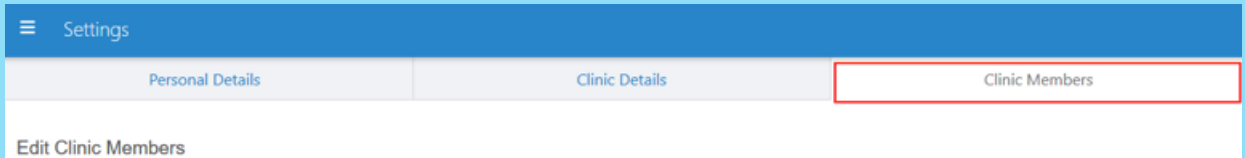
# CLINIC MEMBERS



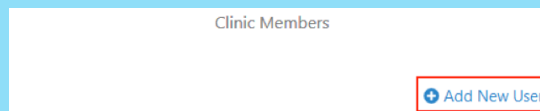
Adding members to your clinic account will ensure that their user accounts are connected to your practice. Ensure information about clinic members is accurate, especially their email address. A clinic member with an active account will be displayed as a contact within the Secure-Mail professional directory.

The third tab in your Account Settings is 'Clinic Members'. You will edit this to add or modify information about members of your clinic.

In this section, the clinic's administrators can edit the information for their practice members to ensure they are properly connected to your clinic and discoverable in the directory. In this tab, it is important to indicate clinic role as well as assign Shared Inbox access appropriately.



You can add a new user by clicking on 'Add New User'. This is located to the top right of the 'Clinic Members' tab.



Fill in all the fields listed with the correct information:

- **EMAIL** – this will be the email address this user uses to login to their account and where they will receive notifications of new messages.
- **IF YOU ENCOUNTER THE ERROR** "This email address is already taken", please contact Brightsquad support to assist in re-configuring the existing account so it can be connected with your clinic.

- **PREFIX** – Select the most appropriate prefix for the individual from a 'drop down' list. This selection is optional.

- **FIRST NAME/LAST NAME** - Use the team member's actual name, as members should not share accounts.

- **ROLE** – From the drop-down list, select the most appropriate role for the team member. Options are “Clinicians” and “Staff.” Once the account is created Clinician users will have the option to list a specialty.

Role

- **WORK PHONE/MOBILE PHONE** – Enter the work phone number and mobile phone number of the staff member. This selection is optional and not displayed in the Directory.

Work Phone

Mobile Phone

- **ASSOCIATION NAME** – This is not your practice’s name. This is where you enter the name of the association or college that this team member belongs to. *Example, Alberta Medical Association, or College of Physicians and Surgeons of Alberta (whichever is most commonly used for their profession).*

Association Name

- **ASSOCIATION ID** – This is where you enter the team member’s association registration/membership ID. This information is not displayed in the Directory.

Association Id

- **ADMINISTRATOR** – You can check the box if you want this person to be an administrator for your clinic’s Secure-Mail account. By doing this you give the individual all the subscription admin rights such as adding and removing users, and assigning Shared Inbox access.

Administrator  Administrator


- **SHARED INBOX** – You can check the box if you want this person to have access to the clinic’s Shared Inbox. With this access the individual can see all the Secure-Mail messages that are sent to the clinic’s ‘Shared Inbox’ by patients and professional users.

Shared Inbox  Enable Shared Inbox

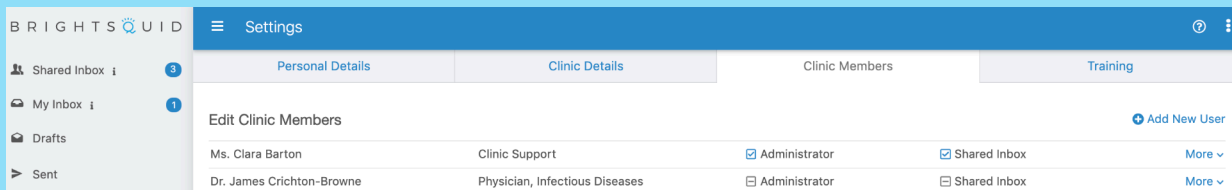
You can click 'Cancel' if you do not want to save the information. If the information is correct click 'Save'.

[Cancel](#)

[Save](#)

You will see an 'eye icon'  next to some fields. This means that the information in that field is not displayed in the Directory and visible only to the clinic administrator and Brightsquid.

Note that if you make a mistake when creating a user account you do not need to delete it and start over. Most user account settings (Role, Name etc...) can be edited later. Click on 'More' to open and edit a clinic member's profile.



The screenshot shows the Brightsquid Settings page. The left sidebar contains navigation options: Shared Inbox (3), My Inbox (1), Drafts, and Sent. The main content area is titled 'Settings' and has tabs for Personal Details, Clinic Details, Clinic Members, and Training. Under 'Edit Clinic Members', there is a table with columns for Name, Role, and Shared Inbox status. Two members are listed: Ms. Clara Barton (Clinic Support, Administrator, Shared Inbox) and Dr. James Crichton-Browne (Physician, Infectious Diseases, Administrator, Shared Inbox). Each row has a 'More' dropdown menu.

## DELETING A TEAM MEMBER:



If a team member is no longer part of your clinic, then you can use the "Delete" button to remove them from your clinic. Click 'More' to open their profile, scroll to the bottom of the page and you will see the 'Delete' button. Click on it and the member will be removed from your clinic account.

[Delete](#)

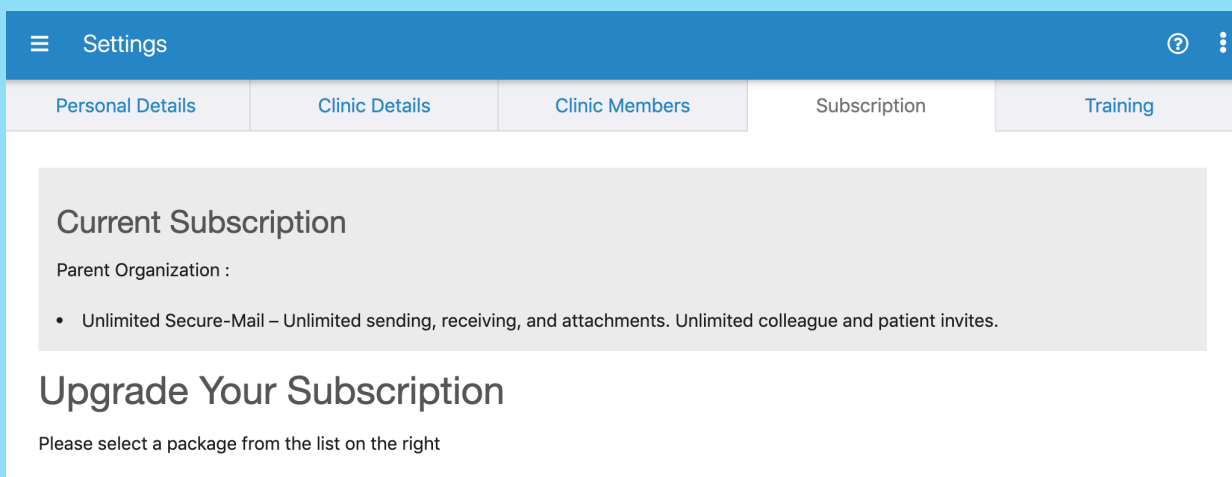
[Reset](#)

[Save](#)

## SUBSCRIPTION:



Your subscription management page is on the tab within 'Settings' next to 'Clinic Members'. This is where clinic administrators can upgrade your clinic account to include additional features and clinician user accounts (seats). In addition to adding new clinicians, administrators can add privacy compliance support that includes training, Privacy Impact Assessments, privacy and security consulting, and regular privacy compliance checkups.



The screenshot shows the Brightsquid Settings page with the 'Subscription' tab selected. The page title is 'Settings'. Below the tabs, there is a section titled 'Current Subscription' with the text 'Parent Organization :'. A bullet point indicates 'Unlimited Secure-Mail – Unlimited sending, receiving, and attachments. Unlimited colleague and patient invites.' Below this is a section titled 'Upgrade Your Subscription' with the text 'Please select a package from the list on the right'.

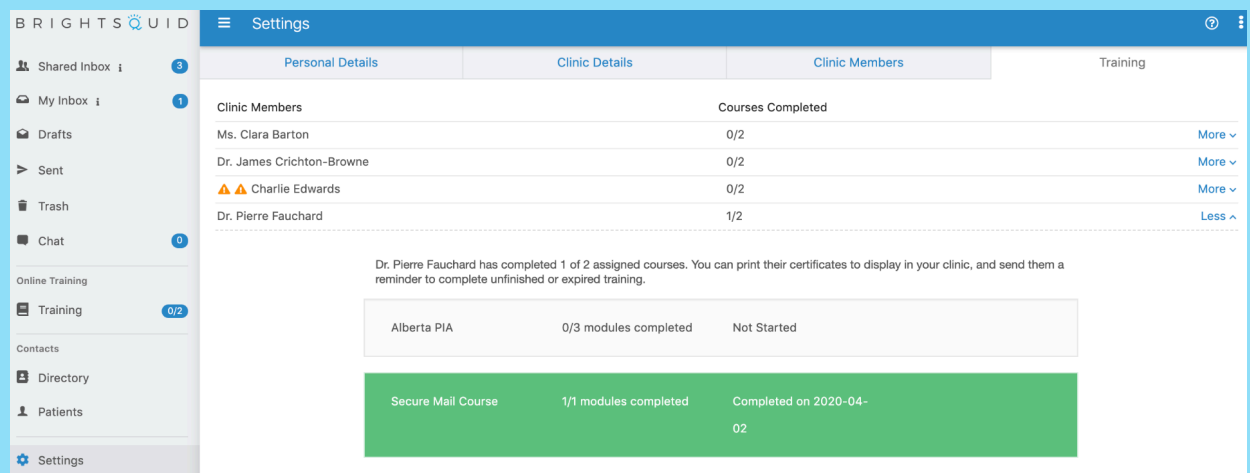
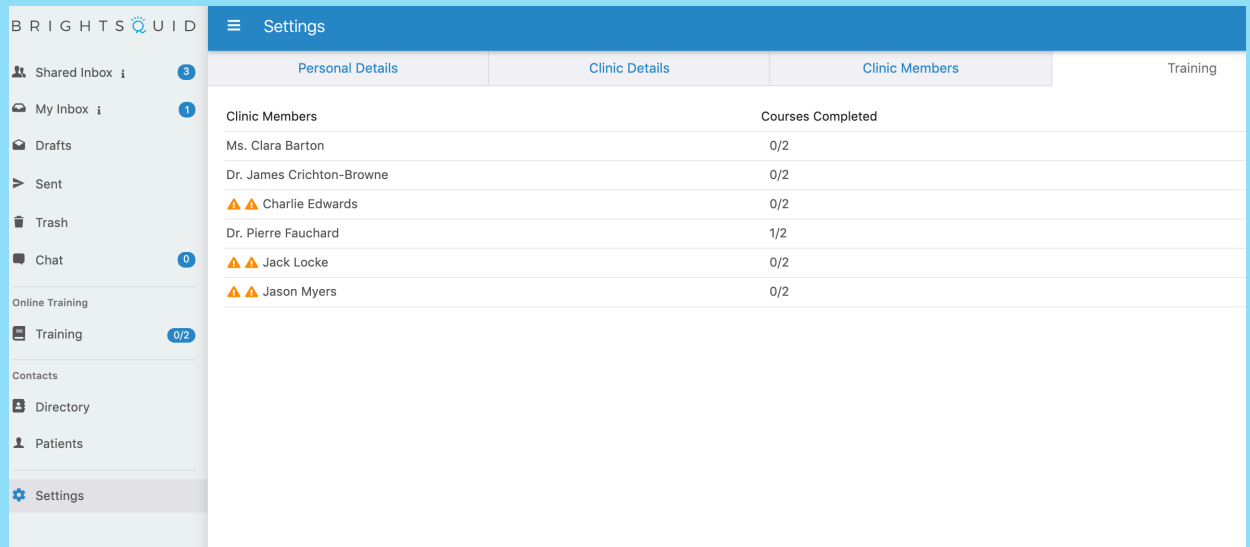
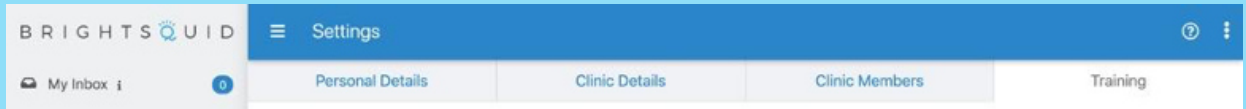


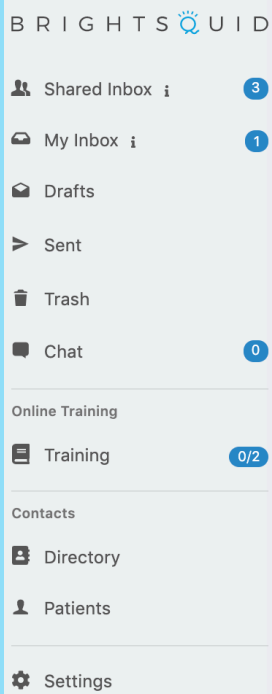
# TRAINING



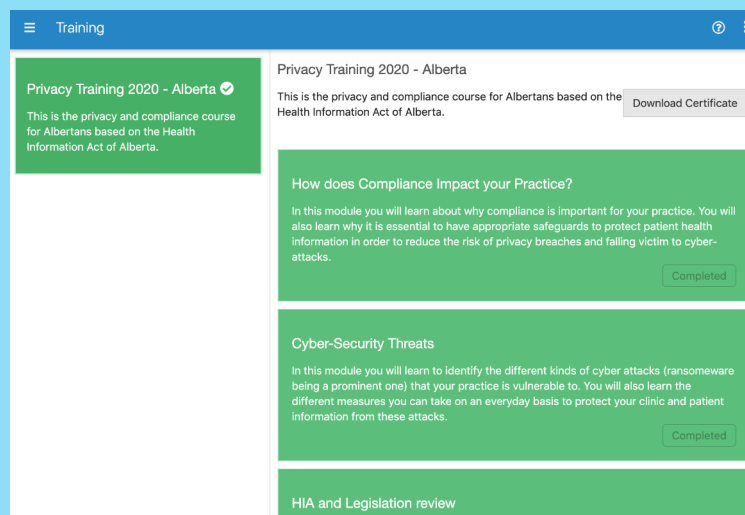
The training page is the last tab within ‘Settings’. Clinics will see this tab if their subscription includes privacy training. The ‘Training’ tab can be used by administrators to view the status of each clinic member’s progress through available training courses.

Everyone is able to access the training section of their Secure-Mail account found in the left navigation bar. Certain training modules, such as Secure-Mail training, are available to all users, but premium courses such as privacy compliance will be greyed out if a clinic is not fully subscribed. For more information please contact Brightsquid support.





Once a clinic member completes a course they can go to the 'Training' tab in the left navigation bar, click on the completed course and download their certificate which may entitle them to CE credits.



## Secure-Mail User Personal Preferences & Tools



Brightsquid Secure-Mail users can update their personal profile in Brightsquid at any time to customize how they appear in the Brightsquid directory and enable or disable certain features such as the ability for patients to message them directly.

Personal Details tools are accessed via the **Settings** link on the lower left screen on the grey toolbar.

If you do not see the grey toolbar or settings link, click the menu toggle icon on the blue bar.



Menu toggle icon (sometimes called a "Hamburger Menu")

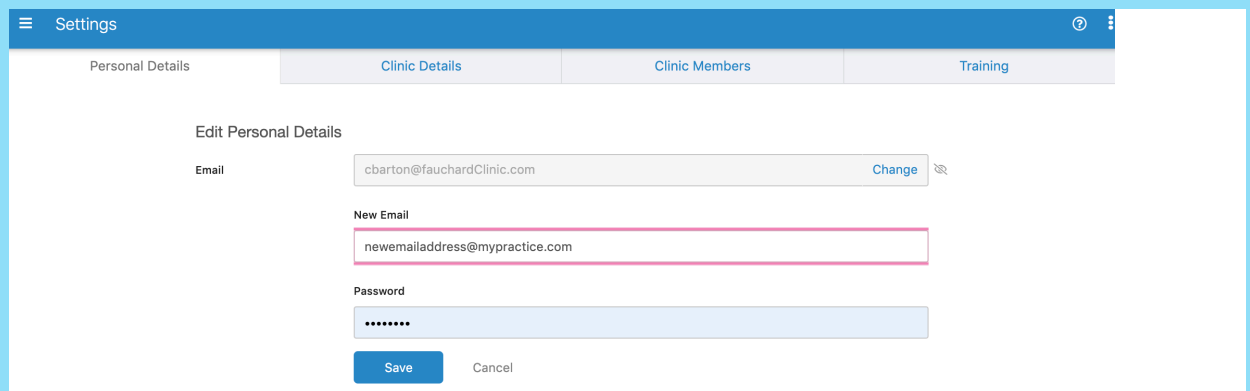


The Settings Icon

Personal details is the first tab listed in the Settings menu, note that non-administrators are only able to edit their own personal information and the other sections in the Settings menu are read-only.

These are the fields that non-administrators can edit in their personal details:

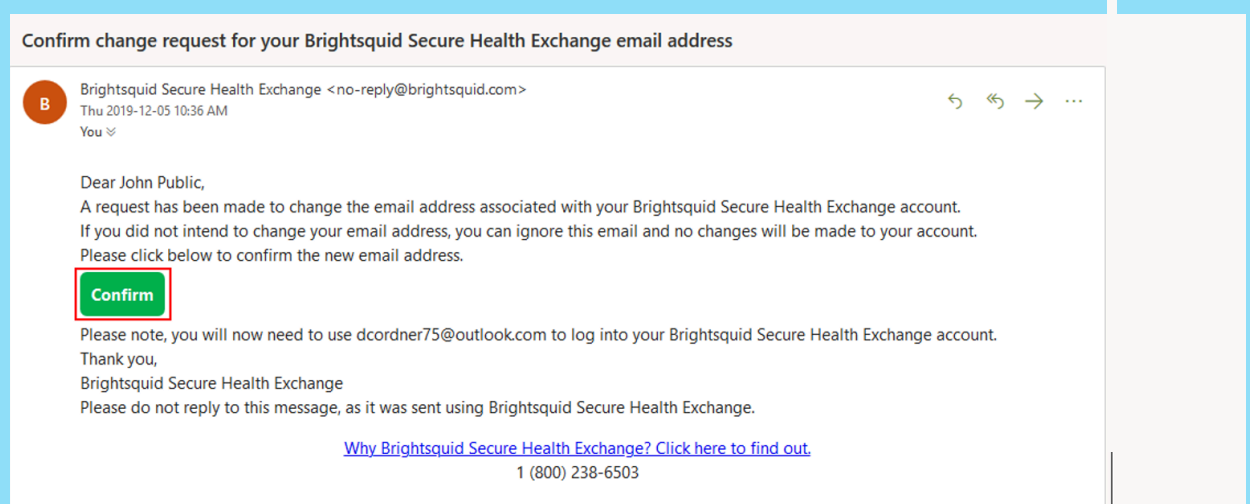
**EMAIL ADDRESS** – You can change the email address that is connected to your Secure-Mail account.



The screenshot shows the 'Settings' page with a navigation bar containing 'Personal Details', 'Clinic Details', 'Clinic Members', and 'Training'. Under 'Edit Personal Details', the 'Email' field contains 'cbarton@fauchardClinic.com' and has a 'Change' button. Below it, the 'New Email' field contains 'newemailaddress@mypractice.com'. The 'Password' field is masked with dots and has a 'Change' button. At the bottom, there are 'Save' and 'Cancel' buttons.

Click 'Change' in the email field to enter the new email address & password and click 'Save'.

You will receive a confirmation request message at the new email address. Click 'Confirm' to change your email address and login to your Secure-Mail account using your new email address and the old password.

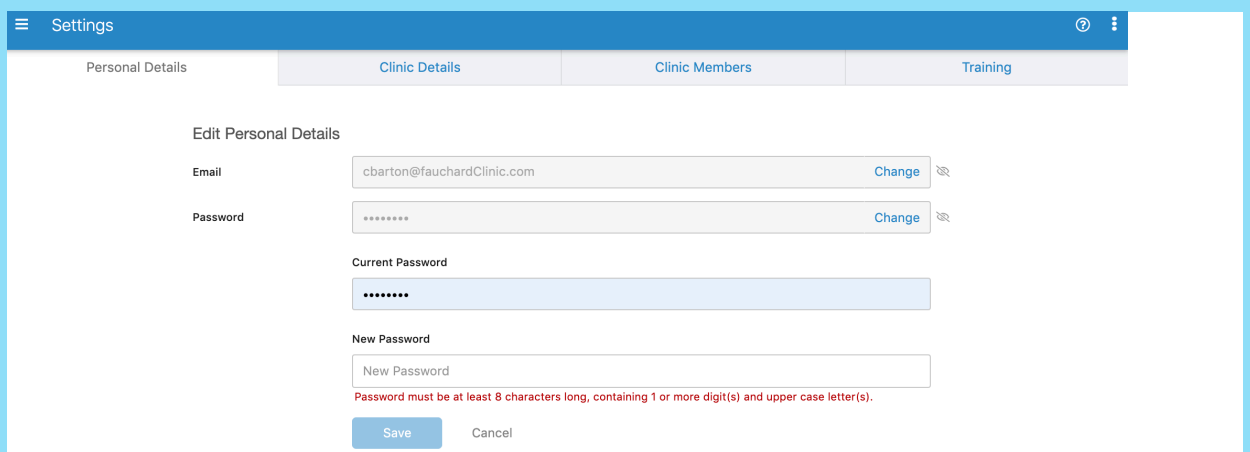


The screenshot shows an email titled 'Confirm change request for your Brightsquid Secure Health Exchange email address'. The sender is 'Brightsquid Secure Health Exchange <no-reply@brightsquid.com>'. The email body says: 'Dear John Public, A request has been made to change the email address associated with your Brightsquid Secure Health Exchange account. If you did not intend to change your email address, you can ignore this email and no changes will be made to your account. Please click below to confirm the new email address.' A green 'Confirm' button is highlighted with a red box. Below the button, it says: 'Please note, you will now need to use dcardner75@outlook.com to log into your Brightsquid Secure Health Exchange account. Thank you, Brightsquid Secure Health Exchange. Please do not reply to this message, as it was sent using Brightsquid Secure Health Exchange.' At the bottom, there is a link: 'Why Brightsquid Secure Health Exchange? Click here to find out.' and a phone number: '1 (800) 238-6503'.

Note that you will not be able to change your email address to one that is already in use by an existing user. If you encounter an error when changing your email address please contact Brightsquid support for assistance (**800 238 6503**).

**PASSWORD** – You can change your password by clicking 'Change' in the 'Password' field.

Then enter your 'Current Password' followed by the 'New Password' that you want to change it to and



The screenshot shows the 'Settings' page with a navigation bar containing 'Personal Details', 'Clinic Details', 'Clinic Members', and 'Training'. Under 'Edit Personal Details', the 'Email' field contains 'cbarton@fauchardClinic.com' and has a 'Change' button. Below it, the 'Password' field is masked with dots and has a 'Change' button. Under 'Current Password', there is a field with dots. Under 'New Password', there is a field with 'New Password' text. Below the 'New Password' field, there is a red error message: 'Password must be at least 8 characters long, containing 1 or more digit(s) and upper case letter(s)'. At the bottom, there are 'Save' and 'Cancel' buttons.

click 'Save'. If you do not want to go ahead with this process click 'Cancel'.

**PREFIX** – Select the 'drop-down' list to choose the most appropriate prefix that describes you.

Prefix	Ms.
First Name	Dr.
Last Name	Mr.
Job Title	Mrs.
	Ms.
	Some Support

**FIRST NAME** – Type your first name as it should appear in the directory.

First Name	Tony
------------	------

**LAST NAME** - Type your last name as it should appear in the directory here

Last Name	Leong
-----------	-------

**SPECIALITY NAME** - This field is only available for clinician accounts. Select the 'drop-down' list to choose the most appropriate speciality that describes your practice. It is important to select the proper specialty, as many users search for contact in the directory using this field.

Specialty Name	Select...
Work Phone	Acupuncturist
Mobile Phone	Athletic Therapist
Association Name	Audio Prosthetist
Association Id	Audiologist
	Chiroprapist

**WORK PHONE AND MOBILE PHONE** – Enter your work and mobile phone numbers respectively in these fields (optional).

Work Phone	<input type="text"/>
Mobile Phone	<input type="text"/>

**ASSOCIATION NAME** – This is not your practice's name. This is where you enter the name of the association you belong to. *Example, Alberta Medical Association.*



Association Name	<input type="text"/>
------------------	----------------------

**ASSOCIATION ID** – This is where you enter your practice's registration/membership ID

Association Id

**SIGNATURE** – Your *'Signature'* is a message included in the notification message sent to recipients' regular email address notifying them you have sent them a Secure-Mail message.

Signature

Normal Normal B I U  

Clara Barton, on behalf of Dr P Fauchard  
403 555 1234  
The Fauchard Clinic  
123 Any Street  
Calgary AB

The 'Signature' field is already populated with text that establishes both authenticity and seriousness of the Secure-Mail Messaging platform. You are free to edit it as per the instructions of your Custodian or Privacy Officer, recognizing that this message should include no private information.

**SECURE-MAIL SUBJECT** – This is not checked by default.

Secure-Mail Subject  Show Secure-Mail subject on email notifications

If this box is checked, whenever you send a Secure-Mail message, the recipients will receive the same subject-line in their traditional email as the Secure-Mail message you have sent them. Please observe caution if you turn this option on and ensure that the subject-line doesn't contain any patient health information. That way you will make sure that patient information is secure and protected.

**RECEIVE MESSAGES** – This is not checked by default.

Receive Messages  Allow patients to message you

If you check this box, patients will be able to send Secure-mail messages directly to you. If this is not checked, then the patient can still send Secure-Mail messages to the clinic. As described in the "Best Practices" section of this document it is suggested that this box be unchecked for all members of the clinic to properly route all patient-sent messages to the Shared Inbox.

Dr. Pierre Fauchard is not accepting messages from patients.  
Do you want to send message to Fauchard Clinic instead ?

[Reset](#)

[Save](#)

Note that if you click 'Save' first then the changes will be permanent.

Once you have made all the desired changes and you are certain of the correctness, click 'Save' to make these changes permanent.

## Configuring Secure-Mail to Maximize Efficiency

Secure-Mail is a highly flexible communications tool that allows clinics and their team members to exchange and discuss private patient information with internal colleagues, external colleagues and patients in a way that is familiar and easy to use.

This section covers the day-to-day use of Secure-Mail and explains the various features and benefits of each section of the system. For more detail on any of the described processes please visit our customer service portal at <https://support.brightsquid.com> or contact our customer service team at 1-800-238-6503.

### HOW TO LOGIN - CLINICIAN OR OFFICE STAFF:



**STEP 1:** In any Internet browser (Chrome, Safari, Microsoft Edge, Firefox), go to <https://health.brightsquid.com/login>. Bookmark this page in your preferred browser for future use.

**STEP 2:** Enter the complete email address associated with your Secure-Mail. If you only enter your name you will not be able to login.

A screenshot of the Secure-Mail login interface. At the top, it says "Welcome to Secure-Mail". Below that is an "Email" label and a text input field containing the email address "tonyleong@myemailaddress.com".

**STEP 3:** Enter your password. Ensure that your Caps Lock is not on as passwords are case sensitive.

**STEP 4:** Click Login to open your Secure Mail inbox.

Login

Forgot Password

### RESET YOUR LOGIN PASSWORD:

**STEP 1:** Click on 'Forgot Password' on the login page <https://health.brightsquid.com/login>.

A screenshot of the Secure-Mail login interface. At the top, it says "Welcome to Secure-Mail". Below that are two input fields: "Email" with the address "cbarnton@fauchardClinic.com" and "Password" which is masked with dots. Below the password field is a blue "Login" button, which is highlighted with a red rectangular border. Underneath the "Login" button is a link for "Forgot Password". At the bottom of the page, there is a small note: "Scheduled updates may limit service availability Thursdays 11pm - 12am Eastern. [Contact us for help.](#)"

- Enter your registered email address with Secure-Mail in the **'Email'** field (highlighted blue)
- Then click the **'Reset Password'** button (highlighted red)

Welcome to Secure-Mail

Email  
cbarnton@fauchardClinic.com

Password  
\*\*\*\*\*

Login

Forgot Password

Scheduled updates may limit service availability Thursdays 11pm - 12am Eastern. [Contact us for help.](#)

**STEP 2:** Open the link in the email sent to you. This will be sent to you in your primary mailbox that you used to register with Secure-Mail. Click on the green **'Reset Password'** button.

**Reset your Brightsquid Secure Health Exchange password**

Brightsquid Secure Health Exchange <no-reply@brightsquid.com>  
Thu 2019-12-05 9:45 AM  
You

Dear Jane Doe,  
You (or someone else) has requested to reset your password.  
If you did not intend to reset your password, you can ignore this email and your password will not change.  
Please click below to reset your password.

**Reset Password**

This password reset request is only valid for the next 24 hours.  
Thank you,  
Brightsquid Secure Health Exchange  
Please do not reply to this message, as it was sent using Brightsquid Secure Health Exchange.  
[Why Brightsquid Secure Health Exchange? Click here to find out.](#)  
1 (800) 238-6503

Ensure that your password meets the Brightsquid requirements.

### Reset Your Password

Password  
(atleast 8 characters including one capital and numeric character)

Confirm Password

**Reset Password**

Type your new password in the **'Password'** and **'Confirm Password'** fields. You password must have:

- Minimum of eight characters (more than 8 is great!)
- At least one number
- At least one capital letter

When you're done, click the **'Reset Password'** button next.

**STEP 3:** A successful reset redirects you to <https://health.brightsquid.com/login>

You can now login to your Secure-Mail account with your new password.

## SENDING AND RECEIVING MESSAGES (PATIENTS AND COLLEAGUES)



Brightsquid Secure-Mail is used to exchange messages safely with anyone, including other professionals or clinics, and patients. As a subscriber, you are able to invite anyone else to have their own free account so that they can communicate with you securely regarding private healthcare matters.

In this section, you will learn how to compose a message and invite new users.

### COMPOSING, SENDING, AND ATTACHING FILES TO A MESSAGE



Creating messages in Secure-Mail is very similar to traditional email.

This can be done in 2 ways:

1. By composing a new message from your inbox
2. By selecting a clinic or contact in the Secure-Mail directory



#### SENDING METHOD 1: Composing a new message from your inbox

**STEP 1:** Click the green compose button.

Note that on a desktop or laptop computer the compose button is square, but on most mobile devices it is round.

**Compose**

Desktop or laptop view



Mobile Device view

**STEP 2:** Address your Message

When addressing your message you can enter your desired recipient's name, email address or clinic name in the "To:" field. Email addresses are unique in Secure-Mail and therefore are often the most accurate way to specify your recipient. You can include as many recipients as necessary.

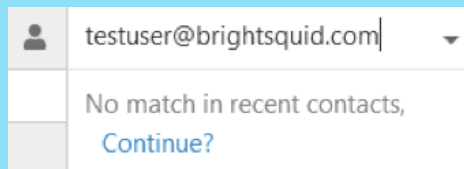
	To (email, name, or clinic) ▾
	Type to search

As you type into the "To:" field the system will automatically search for a match in your recent contacts. If a match is found it will be displayed as below:

	pier  ▾
	Dr. Pierre Fauchard (pfauchard@brights...)
	Fauchard Clinic
	Fauchard Clinic

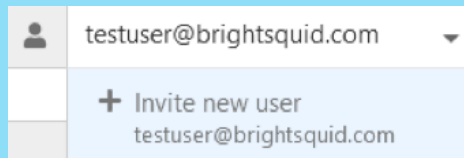


If no match is found, you will be given the option to continue to search the greater Brightsquid community for a match outside your recent contacts.



A dropdown menu with a search bar containing 'testuser@brightsquid.com'. Below the search bar, the text reads 'No match in recent contacts, Continue?' with 'Continue?' as a blue link.

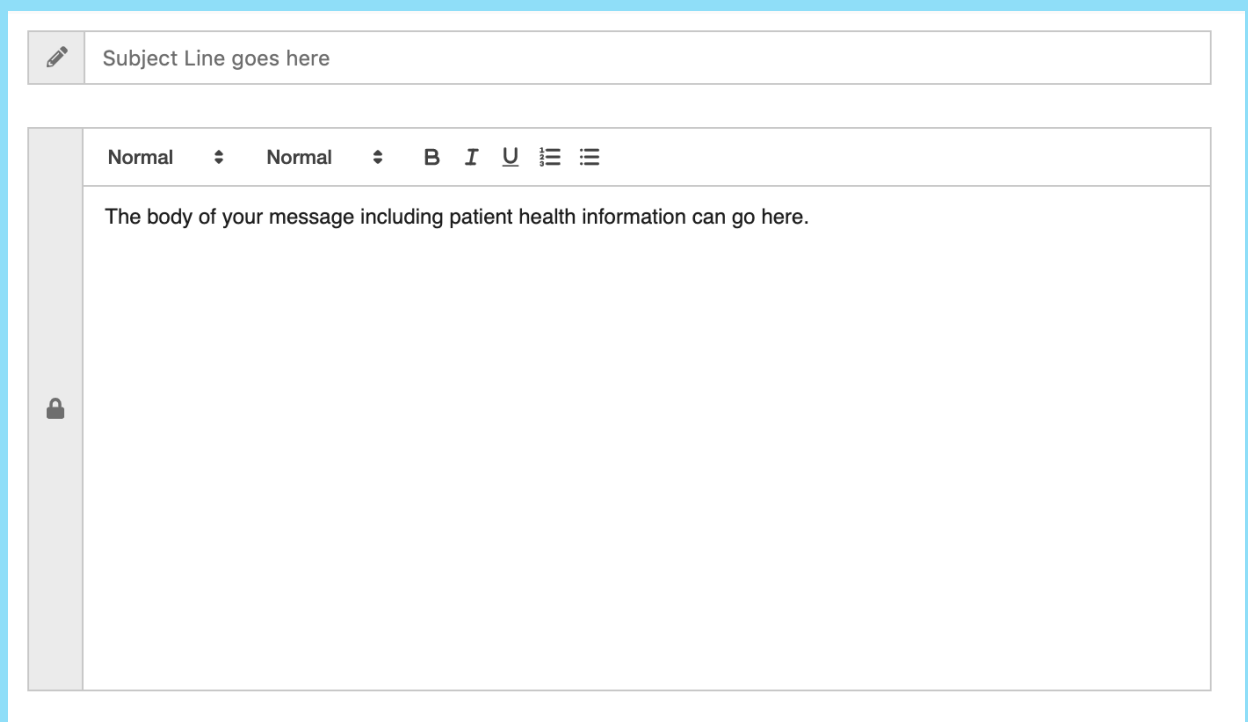
If a match is still not found, you will be prompted to invite the new user via the entered email address. See the section on "Inviting Users" for more information on this process.



A dropdown menu with a search bar containing 'testuser@brightsquid.com'. Below the search bar, there is a blue button with a plus sign and the text '+ Invite new user testuser@brightsquid.com'.

### STEP 3: Compose your message Subject Line and Body

Composing a Secure-Mail message is identical to composing a traditional email message. Note that both subject line and message body are mandatory. Take care to type all private patient information in the message box marked with the CLOSED PADLOCK on the left.



A message composition interface. At the top, there is a subject line field with a pencil icon and the placeholder text 'Subject Line goes here'. Below this is a rich text editor with a toolbar containing 'Normal', 'Normal', 'B', 'I', 'U', and list icons. The main body of the editor contains the text 'The body of your message including patient health information can go here.' On the left side of the editor, there is a vertical bar with a closed padlock icon.

### STEP 4: Attach Files (Optional)

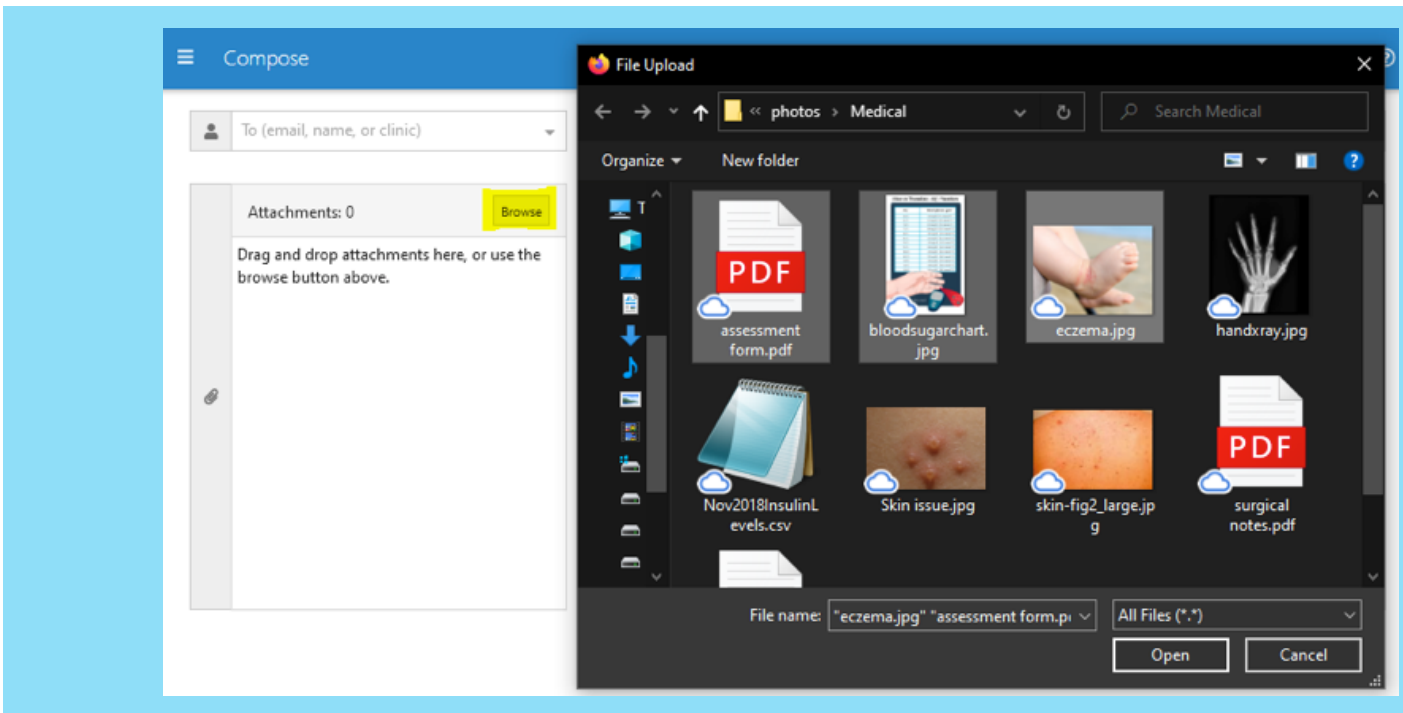
When sending messages you may attach multiple files for your recipient(s). Note that you can attach files up to 500MB in size, which is about 10X larger than is allowed in most email systems. There is no storage limit on your Secure-Mail account, so no need to worry about how many files you send.

To attach a file you have two options:



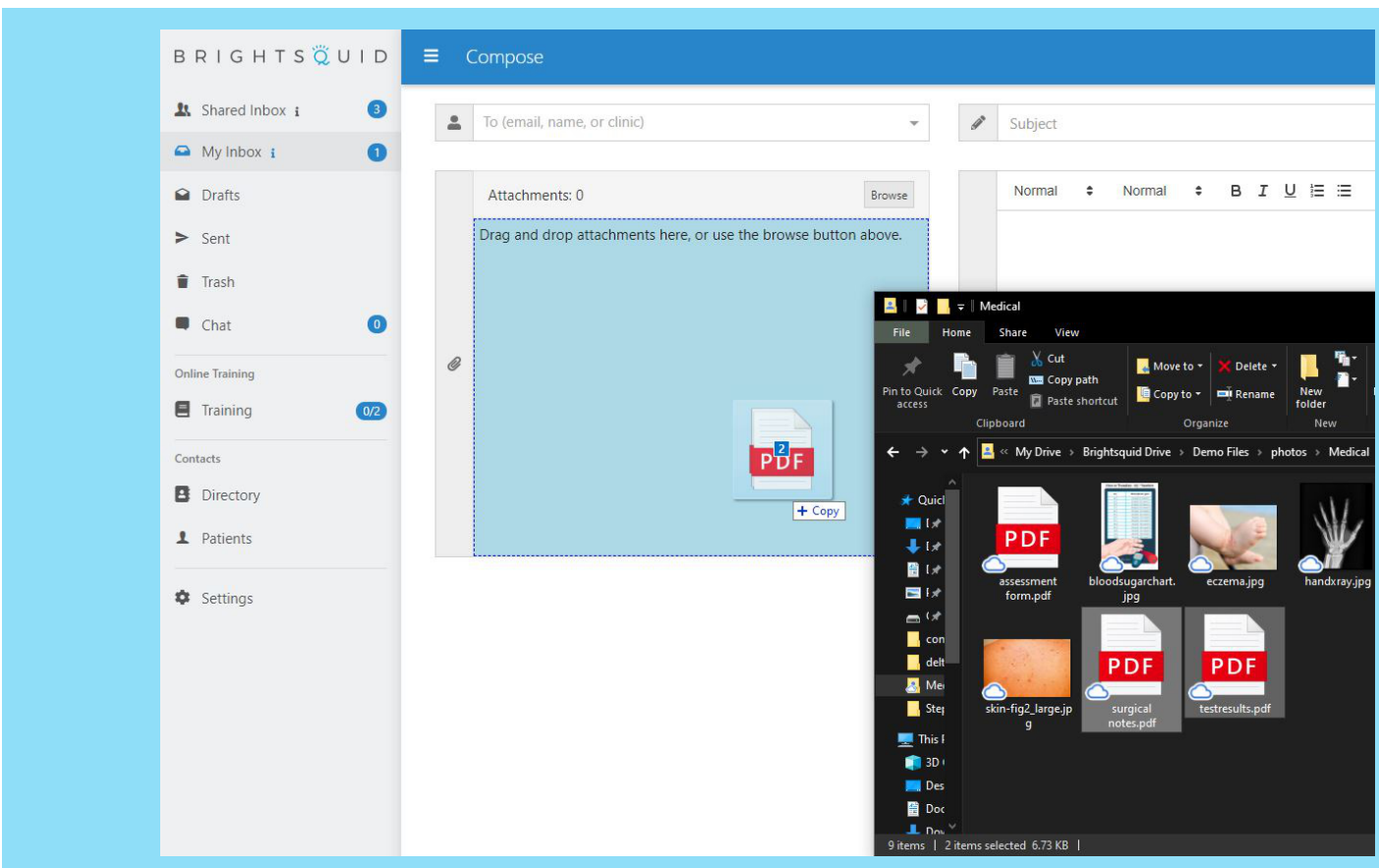
## File Attachment Option 1

Click the 'Browse' button to open a browsing window and select the file or files you wish to attach. You can attach multiple files simultaneously.



## File Attachment Option 2

Open a File Explorer or Finder window on your device and drag and drop files into the message target area under the "Attachments" title. You can attach multiple files simultaneously.



## STEP 5: Customize the email notification (optional)

Directly above the 'Send' button is an 'Edit' button next to an OPEN PADLOCK icon.

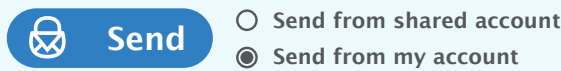


Selecting this button will give you the option to review and edit the email notification that goes to your recipient's regular email address informing them there is a message waiting in their Secure-Mail inbox.

**NOTE: The content of this notification message is not secured and therefore you should never enter patient health information in this section.**

## STEP 6: Send the Message

When you are satisfied with the content of your message, click the blue send button. If you are a member of the Shared Inbox team you will see two radio buttons next to the send button.



These buttons control how your message shows up in recipient inboxes and how replies to your messages are routed.

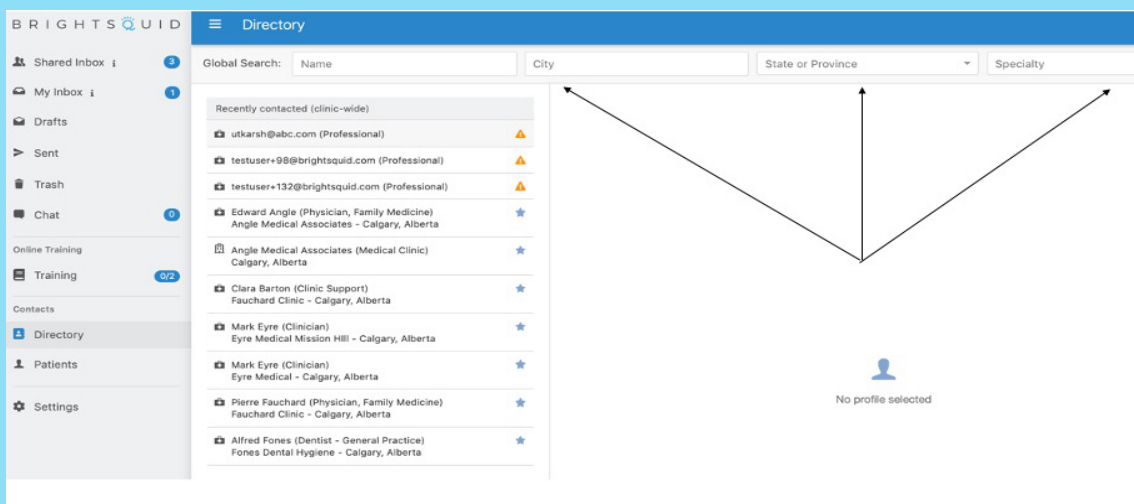
- If you choose 'Send from shared account' then all replies will be routed to the Shared Inbox [This is the preferred method](#)
- If you choose 'Send from my account' then all replies will be routed to your private inbox and no one else will have access to them

If you are not a member of the Shared Inbox team you will not see these radio buttons and instead all messages will be sent from your private inbox. However, replies to your messages will still be routed to the Shared Inbox, provided your preferences have not been customized to allow patients to message you directly.



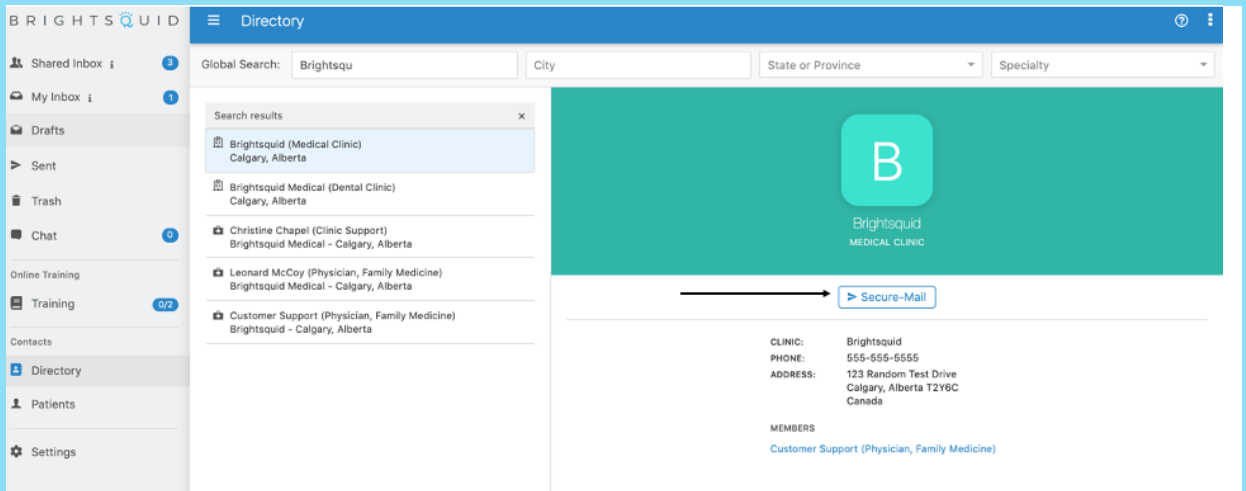
## SENDING METHOD 2: Composing a new message through the Secure-Mail directory

**STEP 1:** Click on 'Directory' in the left navigation bar. In the first 'Global Search' field type the name of the clinic. You can filter your search better by city, state or province and speciality.



Select the clinic you want to message and then click on



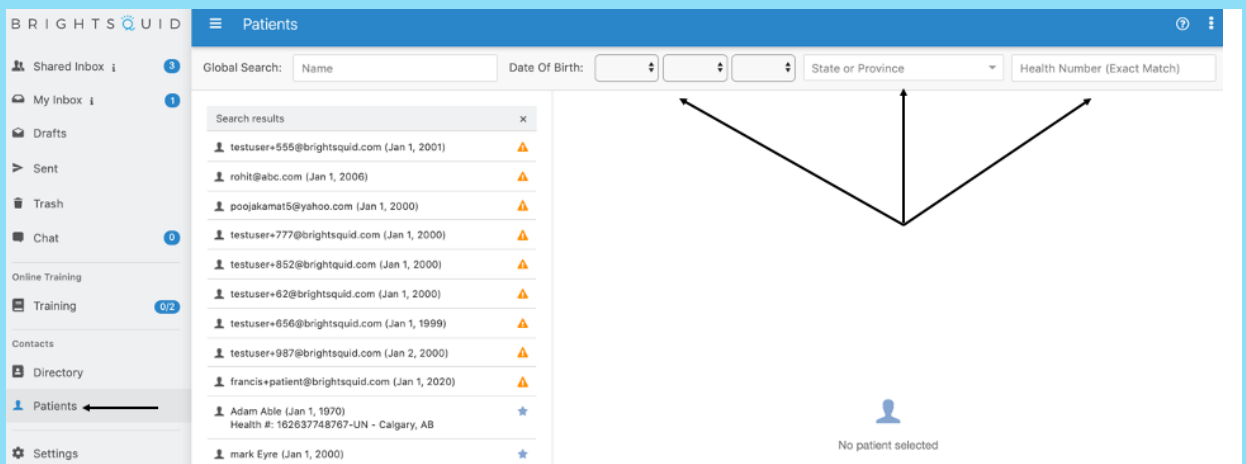


This step will take you to the Compose page as explained in Method 1. To send the Secure-Mail message follow steps 3 to 6 from compose Method 1.

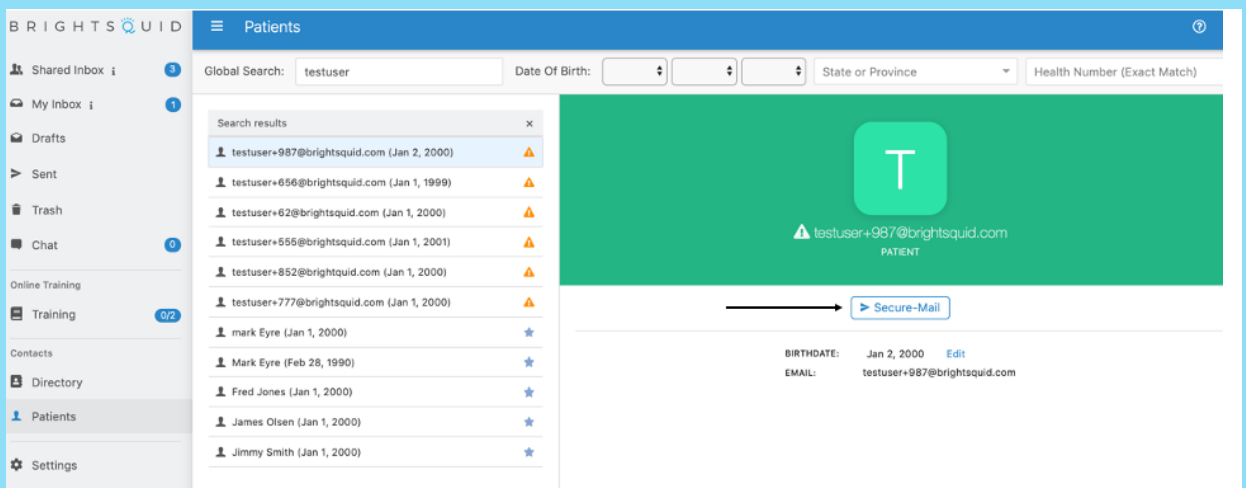


## Sending a message to a patient through the directory.

**STEP 1** Click on Patient in the hamburger menu. In the 'Global Search' field type the name of the patient. You can filter your search better by date of birth, state or province and health number.



Select the patient you want to message and then click on [Secure-Mail](#)



This step will take you to the Compose page as explained in Method 1. To send the Secure-Mail message follow steps 3 to 6 from compose Method 1.

## INVITING NEW USERS TO SECURE-MAIL:



As a subscriber to Secure-Mail you can invite colleagues and patients to use the Secure-Mail with you. Simply invite them by sending a message to their preferred email address as described below.

Users you invite will have their own free account to use to communicate with you. Patient accounts get unlimited usage to message clinics already using Secure-Mail, and there is no paid version for patients. Invited professionals can send up to 20 Secure-Mail messages each month and can communicate with professionals and clinics already on the system, but are not able to invite new users or communicate with patients. Free invited users can upgrade their account for full access.

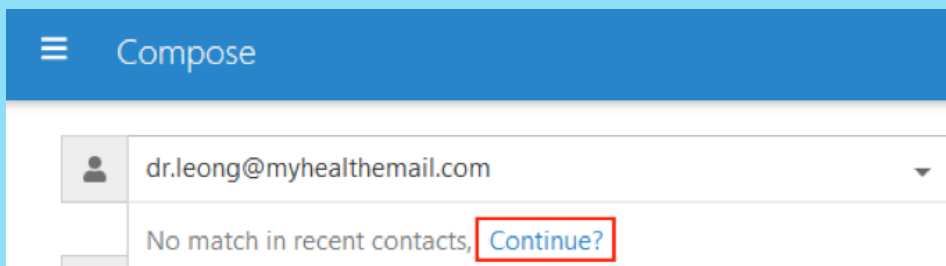


## INVITING AN EXTERNAL PROFESSIONAL COLLEAGUE TO SECURE-MAIL:

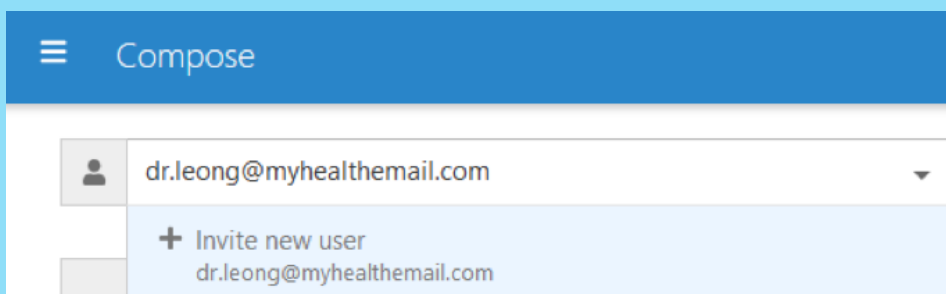
**STEP 1:** Click the 'Compose' button at the top right corner of your screen.



**STEP 2:** Type the complete email address of your intended recipient. If your desired recipient is not already in the system, there will be no match. Click 'Continue' to have the system search the entire directory of Secure-Mail users.



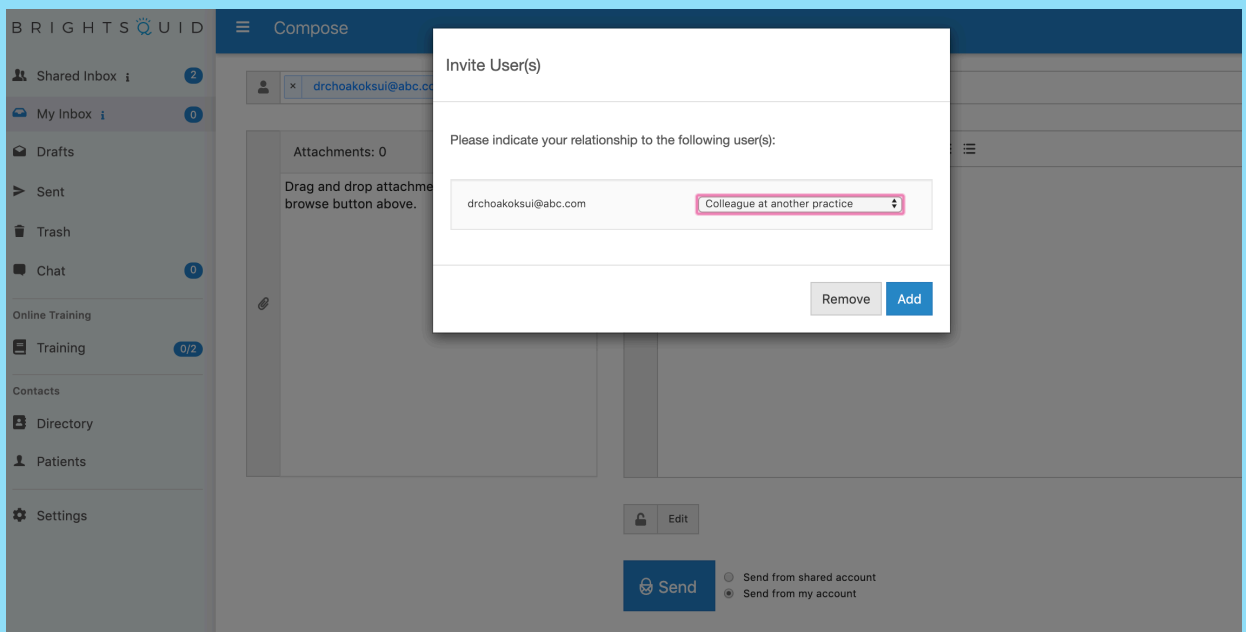
If you still don't see your contact, click 'Invite New User'.



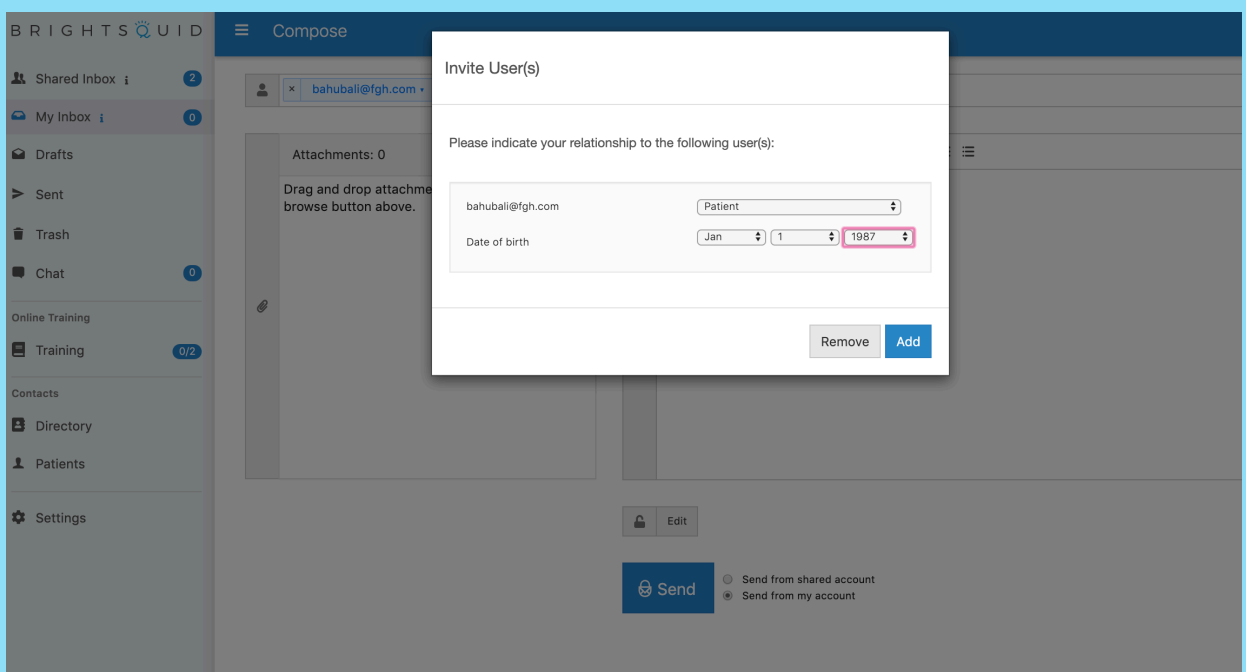
During this stage of the invitation process you will be asked to select your relationship with the recipient.

There are 3 options:

- Colleague at another practice,
- Colleague at my Practice, and
- Patient.



Notice that when inviting patients, you will be asked to provide the patient's Date of Birth as a temporary password until they sign in. This is a one time step. After the patient accepts the invitation and activates their account they will create a new password for all future logins.



**STEP 3:** Complete your message with subject line, message body, and any attachments required as demonstrated in the 'Sending and Receiving Messages' section.

## PREPARATION ACTIVITIES:



1. How will you invite patients and professionals to engage in secure messaging:
  - A. Individually and just-in-time as communication is required?
  - B. Bulk invitations prior to launch?
  
2. Consider how you will identify patients that have accepted your Secure-Mail invitation in your EMR.

---

---
  
3. Patient Consent Considerations:
  - A. When inviting patients to contact your organization and organization members, will you leverage implicit or explicit patient consent methods?
  - B. Do you expect consent to be verbal or written?
  - C. Where will consent be recorded, and who is responsible for recording?
  
4. Patient Messaging Guidelines:
  1. May patients send private messages directly to your organization members?
  2. Which messages sent to patients will leverage standardized message responses that can be copied and consequently pasted into the Secure-Mail message and subjects?
  3. Will you have the patient agree to a standardized set of Terms and Conditions prior to delivering care services to them via the Secure-Mail channel (see appendix for sample)? Note that patients must accept the standard Brightsquid Terms and Conditions to establish their account, however some clinics opt to present a separate set of terms specific to their practice's specific policies.
  4. What are your conventions for determining when a patient messaging encounter is complete?
  
5. When documenting patient messaging in your medical legal record, will you:
  - a. Copy the complete messaging conversation and paste into your medical legal record?
  - b. Summarize the messaging conversation into a specific section of your medical legal record?
  - c. Print the messaging conversation to PDF to a safe folder location, attach the file to the medical legal record, and then delete the PDF from the saved location?
  - d. Save message attachments to a safe folder location, attach them to the medical legal record, and then delete them from the saved location?



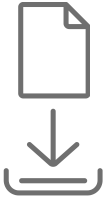
## RECEIVING MESSAGES AND ACCESSING ATTACHMENTS

Any user on the Brightsquid Secure-Mail network can send your clinic a message including attachments. Depending on how you have configured user accounts at your clinic, messages will be addressed to your clinic, or to individual users at your clinic (either by name, or email address). Messages addressed to your clinic name will be delivered to your Shared Inbox for triage.

When a message is sent, a notification message will be delivered to the traditional email address associated with the recipient account. For messages sent to your Shared Inbox, each assigned user will receive a notification email.

Many clinics choose to leave Secure-Mail open as a tab in their Internet browser and check for new messages rather than rely on email notifications. For the Shared Inbox, these checks are usually done on a set schedule or by an "on-duty" member of the Shared Inbox team.

## DOWNLOADING ATTACHMENTS:

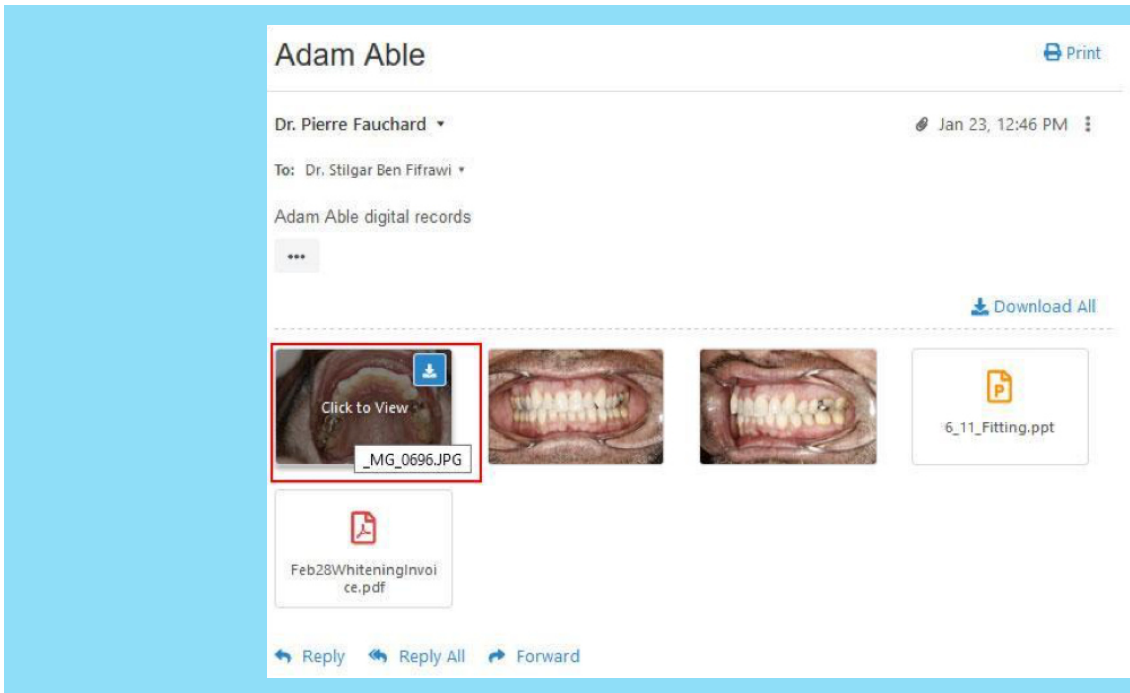


Attachments delivered to a Secure-Mail account can be downloaded to the device the message is viewed on for storage in the appropriate file or patient record.

Downloading files from Brightsquid Secure-Mail is easy as 1, 2, 3. Here is how to download attachments sent with your message:

### OPTION 1: Download a single file

Put your mouse pointer over the thumbnail image of the attached file you want to download. Over the attached file, the download icon appears in the top right corner.

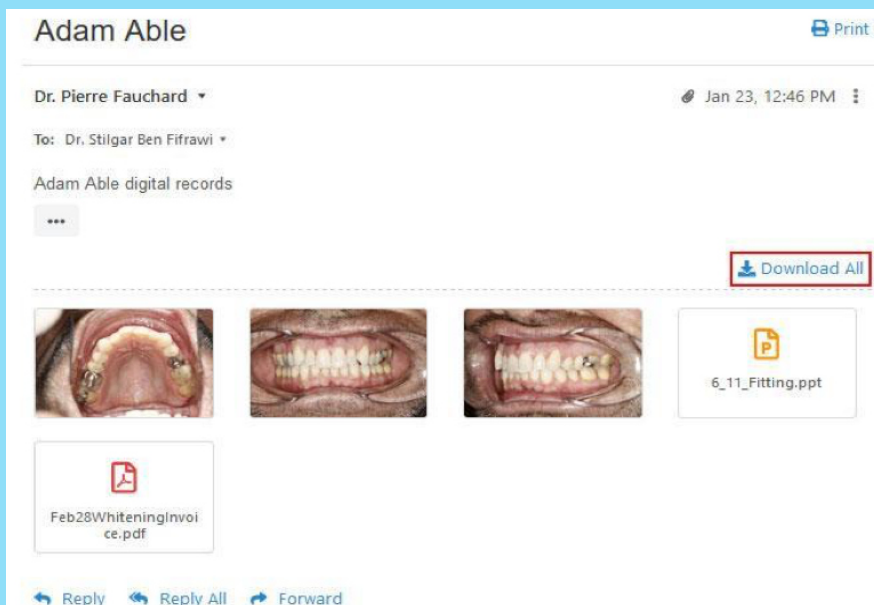


When the download icon appears, move your mouse pointer to click on the icon. The pointer changes from an 'arrow' to a 'finger'. After clicking on the download icon, your web browser would instruct you on the next steps.



### OPTION 2: Download multiple files at once

If your message has multiple files attached, it would take some time to download each one to your workstation. Click on the 'Download All' link located to the right of the attachment section.



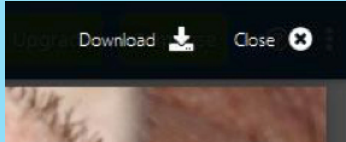


All the attached files are compiled into a Zip folder for download. The Zip folder is given the name of the secure message subject by default. You can change the name of the Zip folder before it is downloaded. Your web browser will assist you with the download to your workstation and appropriate folder.

## VIEW ATTACHMENTS IN SECURE-MAIL:



If the attached file is a PDF, JPEG, PNG or GIF, it can be viewed and downloaded in the Secure-Mail viewer. To view one of these attachment types in Secure-Mail, move your mouse pointer over the image so that 'Click to View' appears. Click there to open the file in the viewer. You will then see the 'Download' button appears to the top right.



After the file downloads, click the 'Close' button to return to your secure message.

# Appendix A - Configuration and use of Clinical Features

## VIRTUAL FRONT DESK - SHARED INBOX BEST PRACTICES



The Shared Inbox in Secure-Mail, as the name suggests, is shared among specific members of your clinic. Those members who are assigned to the Shared Inbox will be notified of new messages delivered to that inbox.

Brightsquid recommends the following settings for your clinic to ensure that messages sent by patients are properly managed by your Virtual Front Desk.

- Multiple staff members should be assigned to have Shared Inbox access to ensure coverage and attention to the inbox during clinic hours.
- Messages sent to patients should include a statement explaining the appropriate use of Secure-Mail for patients
  - IE: Not for emergencies, messages are answered during business hours only etc...
  - This statement is best appended to each users custom email signature (See Settings, Personal Details)
- In most cases clinicians and doctors are not assigned to the Shared Inbox. The first user in your clinic will have Shared Inbox access.
- To focus communications through your Virtual Front Desk, Clinicians and Staff (all Clinic Members) should set their preferences to not allow direct messages from patients (See Settings Personal Details).

## MESSAGE RECALL:



When information is sent to the wrong recipient, this can cause a privacy breach and also risk the reputation of the patient and/or the clinic. Further, it may no longer be appropriate for a patient or professional to have access to certain information.

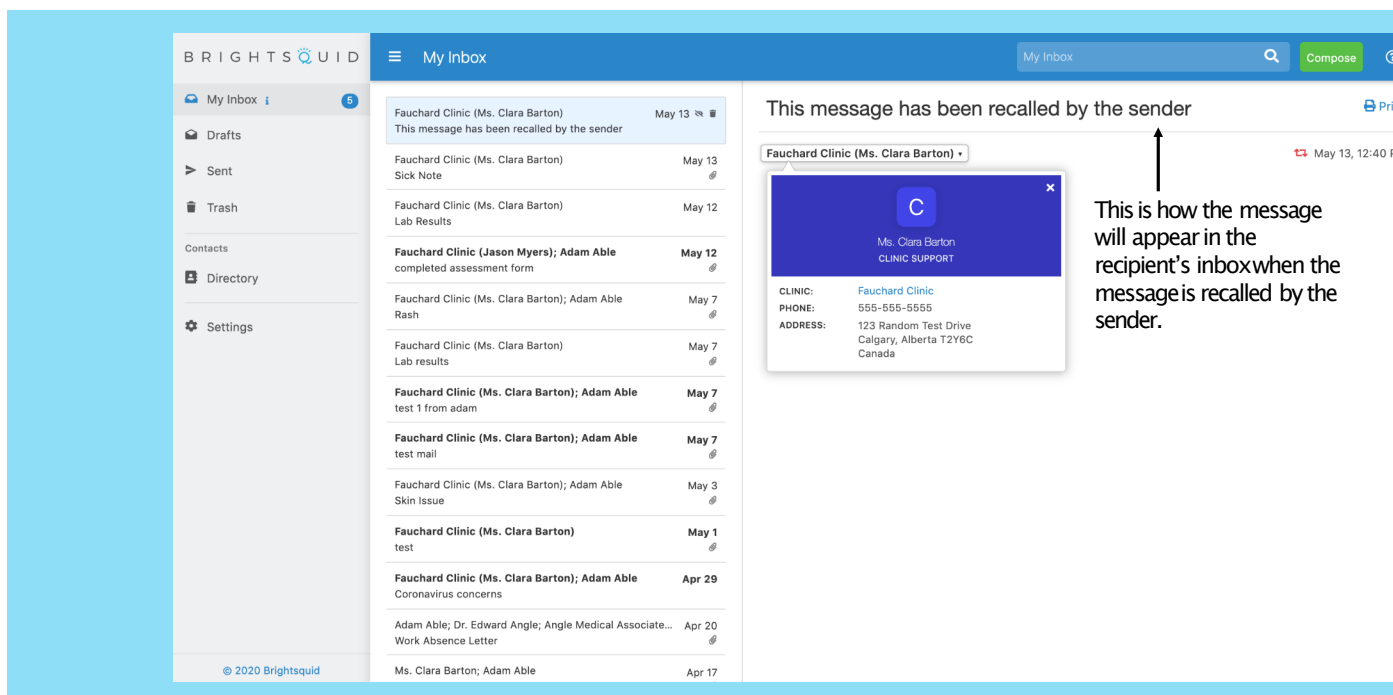
The message recall function allows your clinic to recall a message from a recipient's inbox.

### Here's how:

To recall a message go to the 'Sent' folder, locate the message and open the menu in the top right right corner of the message. Select the 'Recall' option from the dropdown to delete the message from the inbox of all recipients.

The screenshot shows the Brightsquid email interface. On the left is a navigation sidebar with folders like Shared Inbox, My Inbox, Drafts, Sent, Trash, Chat, Online Training, Training, Contacts, Directory, Patients, and Settings. The main area displays a list of sent messages. The selected message is titled 'Lab Results' and is addressed to 'Adam Able'. The message content includes a greeting, a request for lab results, and a PDF attachment named 'Alex\_Lab\_report.pdf'. A dropdown menu is open in the top right corner of the message, with the 'Recall' option highlighted. An arrow points to the 'Recall' option with the text 'Recall Message'. Another arrow points to the PDF attachment with the text 'Attachment has personal health information of another patient'.

Note that once the message is recalled that action cannot be undone.



If a recipient tries to access the message, they will see that it has been recalled. They can only access the sender's contact information as illustrated in the image. The subject line, body and attachments will not be accessible to the recipient.

## PREPARATION ACTIVITY

Which messages should you recall? (Check all that apply)

- Messages that were intended for another recipient
- Wrong message sent to a recipient
- Private, secure, confidential patient information sent that can lead to the possibility of a privacy breach.
- Information that is no longer relevant.
- Other \_\_\_\_\_



## READ RECEIPTS:

When sharing patient records with patients or other professional colleagues it is at times important or even critical to know if they have read the message you sent. To do this click on your 'Sent' folder and locate the message.

The screenshot shows the BrightsUID interface with the 'Sent' folder selected. The message list includes:

- welcome email
- Angle Medical Associates (Dr. Edward Angle) Apr 22, welcome
- Angle Medical Associates (Dr. Edward Angle) Apr 22, test
- Angle Medical Associates (Dr. Edward Angle) Apr 21, Hi welcome to the clinic
- Dr. Edward Angle Apr 21, test
- Adam Able; Angle Medical Associates (Dr. Edward Angle) Apr 20, Work Absence Letter
- Dr. Edward Angle Apr 20, Work Absence Letter
- Angle Medical Associates (Dr. Edward Angle) Apr 19, test
- Dr. Edward Angle Apr 17, test message
- Dr. Edward Angle Apr 17, results

The selected message details are:

- Records for Charles Martin
- Dr. Edward Angle
- To: Ms. Clara Barton (Read: Apr 8, 01:17 PM)
- Clara
- Here are the records you need for Mr Martin regarding his PFT last week.
- Ed
- OoPdfFormExample.pdf
- Fauchard Clinic (Ms. Clara Barton)

Notice the indicator box next to the recipient's name. An orange box indicates that they have not yet read the message and a green checkbox indicates that they have read it (as illustrated below:)

The screenshot shows the BrightsUID interface with the 'Sent' folder selected. The message list includes:

- welcome email
- Angle Medical Associates (Dr. Edward Angle) Apr 22, welcome
- Angle Medical Associates (Dr. Edward Angle) Apr 22, test
- Angle Medical Associates (Dr. Edward Angle) Apr 21, Hi welcome to the clinic
- Dr. Edward Angle Apr 21, test
- Adam Able; Angle Medical Associates (Dr. Edward Angle) Apr 20, Work Absence Letter
- Dr. Edward Angle Apr 20, Work Absence Letter
- Angle Medical Associates (Dr. Edward Angle) Apr 19, test
- Dr. Edward Angle Apr 17, test message
- Dr. Edward Angle Apr 17, results

The selected message details are:

- test
- Dr. Edward Angle
- To: Ray Dixon (Unread)
- test
- Unread
- Reply, Reply All, Forward
- Unread indicator icon

You can also see what date and time the person has first viewed your Secure-Mail message.

## PREPARATION ACTIVITY

In our clinic, Read Receipts will used for (Check all that apply)

- Close loop on referral or referral response
- Ensure patients received documents
- Confirm appointment reminder was viewed by patient
- Other \_\_\_\_\_

# Appendix B - Getting Started With Secure-Mail: Quick Start Guide

## INTRODUCING SECURE-MAIL:




Brightsquid Secure-Mail is a web-based email-like communication service that healthcare professionals use to safely communicate private information with patients and other clinics or providers. Clinics that use Secure-Mail for their Virtual Front Desk have reduced phone traffic by over 30% and even doubled the number of patients they are able to see in one day.

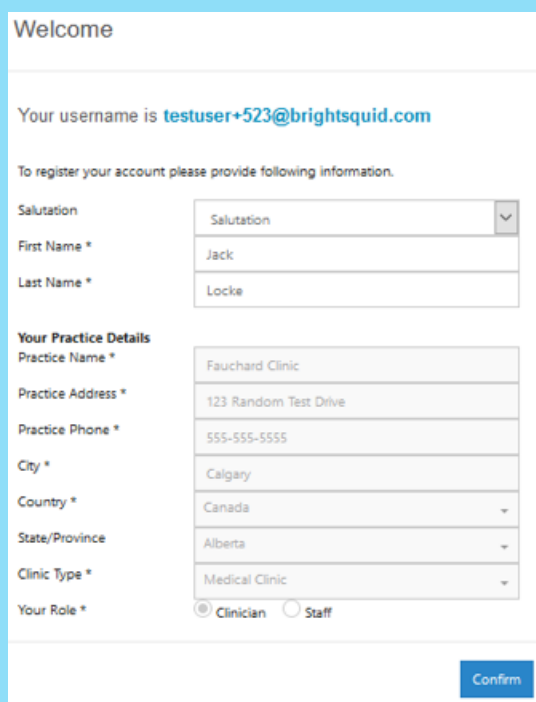
Secure-Mail is not an app so there's no software to install or update. Users log into their account from any web browser on any Internet connected desktop, laptop, phone, or tablet at - <https://health.brightsquid.com>

## GETTING STARTED



### Create and set up your administrative account.

1. You'll receive an email from Brightsquid with the subject line: "Brightsquid wants to securely share patient information with you".
2. Open that email and this green button, to register and activate your account. 
3. You'll be taken to a short form. Fill in your salutation, first name, last name, and your practice details so that others can properly identify you and your clinic in the directory.
4. Select your role and click, "Confirm".



Welcome

Your username is [testuser+523@brightsquid.com](mailto:testuser+523@brightsquid.com)

To register your account please provide following information.

Salutation: Salutation

First Name \*: Jack

Last Name \*: Locke

Your Practice Details

Practice Name \*: Fauchard Clinic

Practice Address \*: 123 Random Test Drive

Practice Phone \*: 555-555-5555

City \*: Calgary

Country \*: Canada

State/Province: Alberta

Clinic Type \*: Medical Clinic

Your Role \*:  Clinician  Staff

Confirm

The final step in registration is to create a password for your administrator account, and agree to the terms of use before proceeding to your Secure-Mail inbox.

Your organization can be configured around one or several Secure-Mail accounts by adding users in specific groups.

### Preparation Activity:



Consider how do you wish to structure your Secure-Mail organizations:

- i) Location: everyone at the same physical location is assigned a Secure-Mail inbox with that organization
- ii) Service: everyone involved in delivering a type or a grouping of services is assigned a Secure-Mail inbox with that organization
- iii) Function: everyone associated with a type or grouping of administrative or clinical functions is assigned a Secure-Mail inbox with that organization.

Once your administrative account has been created, complete the following steps to enable your office's Virtual Front Desk.

## STEP 1: FILL IN REMAINING CLINIC DETAILS TO COMPLETE YOUR DIRECTORY LISTING.



Other users (patients and professionals) can find your clinic by searching clinic name, location, and specialty directly through the Secure-mail professional directory . Make sure they know it's you and enter the name of your clinic the way patients and clinics know it.

This is very important since there may be other clinics with similar names and you do not want the sender to send their private and confidential information to the wrong recipient.

### To enter your clinic details:

1. Log in with your administrator credentials at [health.brightsquid.com](https://health.brightsquid.com)
2. Click 'Settings' in the bottom of the left navigation bar.
3. Select the 'Clinic Details' tab.
4. Fill in all empty fields.

## STEP 2: CREATE USER ACCOUNTS FOR STAFF AND PHYSICIANS IN THE OFFICE:

All staff and physicians can have a Secure-Mail account connected to your clinic. This allows you to assign Virtual Front Desk access, administrators, and triage messages internally. This makes clinic processes more efficient and helps offer better and more timely service to patients.

It is best to connect all of your team members to your clinic upon setup.

This is because team members not added to your account might get invited by others, that would create a new free account for them that is not tied to your clinic, and does not have the same level of access. How to add a staff member to Secure-Mail:

1. Log in with your administrator credentials at [health.brightsquid.com](https://health.brightsquid.com)
2. Click 'Settings' in the bottom of the left navigation bar.
3. Select the Clinic Members tab, click on **+Add New User** to begin inviting your team.



### To create accounts for team members you will need their:

- Full name
- Email address
- Role (Clinician or Staff)

(Other fields are optional and can be added later.)

## STEP 3: CONFIGURE YOUR VIRTUAL FRONT DESK BY ASSIGNING YOUR FRONT DESK TEAM TO SHARED INBOX.



You can divide your team into two basic groups, those who have access to the Shared Inbox and those who do not. In most clinics, staff are assigned to the Shared Inbox whereas Clinicians are not assigned to the Shared Inbox.



Those who have access to the Shared Inbox will receive and be responsible for the majority of incoming patient messages as a team. Responses are tracked so that you can know who sent them. So, it is important to create a user account for each team member that will have access, rather than sharing one account. Team members assigned to the Shared Inbox will receive notification of new messages in the Shared Inbox, and in their own inbox. To give a staff member access to the Shared Inbox:

On the 'Clinic Members' tab in your Secure-Mail settings, expand the user profile of any of your clinic's team members by clicking the **More** ▾ button on the right side of the clinic members page.

Edit Clinic Members				<a href="#">+ Add New User</a>
Ms. Clara Barton	Clinic Support	<input checked="" type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Shared Inbox	<a href="#">More</a> ▾
Dr. James Crichton-Browne	Physician, Infectious Diseases	<input type="checkbox"/> Administrator	<input type="checkbox"/> Shared Inbox	<a href="#">More</a> ▾
Charlie Edwards	Clinician	<input type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Shared Inbox	<a href="#">More</a> ▾
Dr. Pierre Fauchard	Physician, Family Medicine	<input checked="" type="checkbox"/> Administrator	<input type="checkbox"/> Shared Inbox	<a href="#">More</a> ▾

The expanded view of the Member profile has 4 check-box options near the bottom of the page that look like this:

Receive Messages	<input type="checkbox"/> Allow patients to message user
	<input type="checkbox"/> Allow professionals to message user
Administrator	<input type="checkbox"/> Administrator
Shared Inbox	<input checked="" type="checkbox"/> Enable Shared Inbox

- **RECEIVE MESSAGES** - This box is unchecked by default, instead messages will be routed to the Shared Inbox.
- **ADMINISTRATOR** - This box is off by default. Checking it on will allow that user to carry out administrative tasks within your clinic's Secure-Mail account. More than one person can have administrative rights on your clinic account.
- **SHARED INBOX** - This box is checked by default for all users. This means that the user will have access to the Shared Inbox and will be notified of new messages sent to the clinic. It is recommended that Shared Inbox be turned off for Clinician accounts. You may also turn it off for staff members that do not require access to all patient messages or replies.

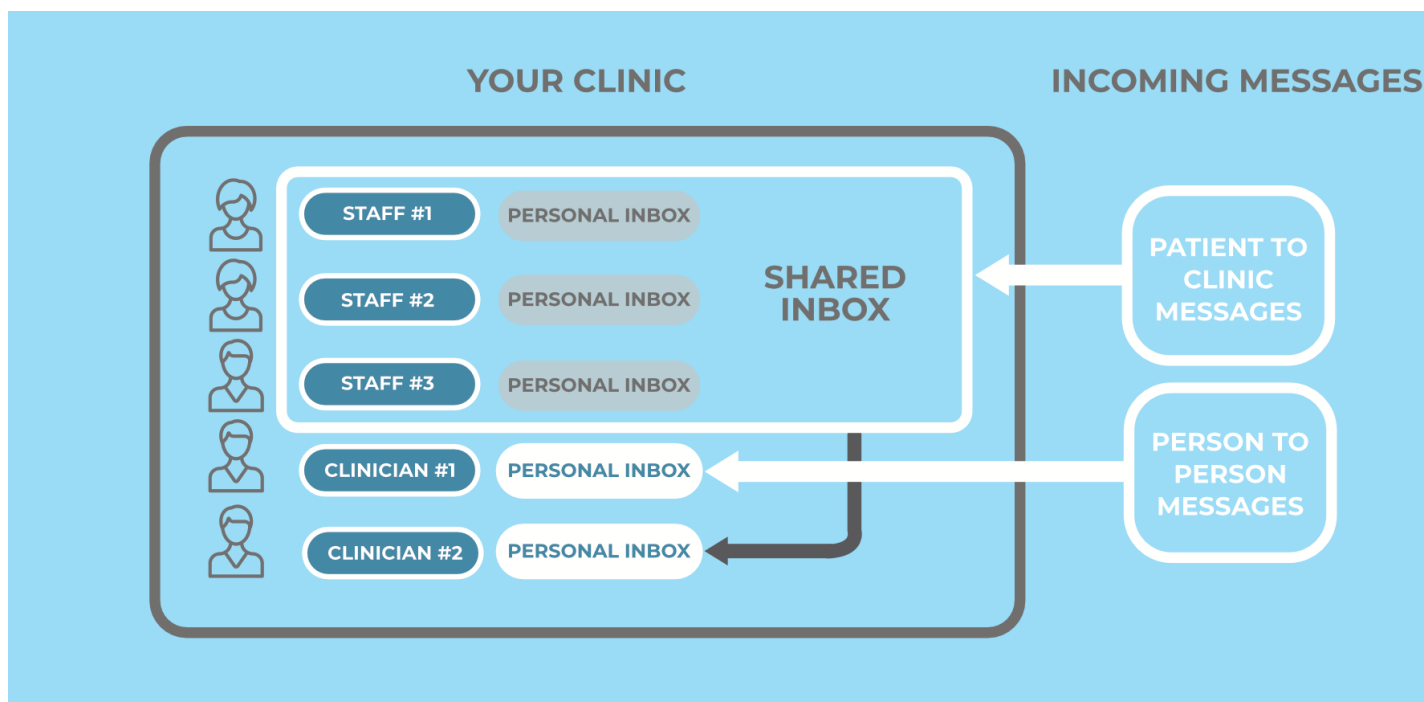
#### PREPARATION ACTIVITY:

- Which role(s) will be assigned as Secure-Mail administrator(s)?
- How many administrators will be assigned?



## ONCE CONFIGURED AS DESCRIBED ABOVE YOUR PRACTICE CAN BE VISUALIZED LIKE THIS:

- Only staff members will be notified of incoming messages from patients
- Staff may choose to forward messages to clinicians when it's appropriate
- Clinicians may send messages to Patients
- Patients may not respond directly to the clinicians
- All patient messages are routed to the Shared Inbox



## STEP 4: INVITE PATIENTS TO USE YOUR SECURE-MAIL VIRTUAL FRONT DESK



All of your patients can be invited to have a free Secure-Mail account of their own. All they need is an email address and a device connected to the Internet to access messages from your clinic. This device could be a desktop, laptop, phone, or tablet.

On average, clinics that use Secure-Mail with their patients receive 5-6 messages a day. Studies show that clinics easily handle the volume of patient messages they receive and create efficiencies by focusing time on tasks that benefit patient health. As a result, clinics have reported an increase in staff retention due to higher job satisfaction as MOAs have more time to practice their expertise.

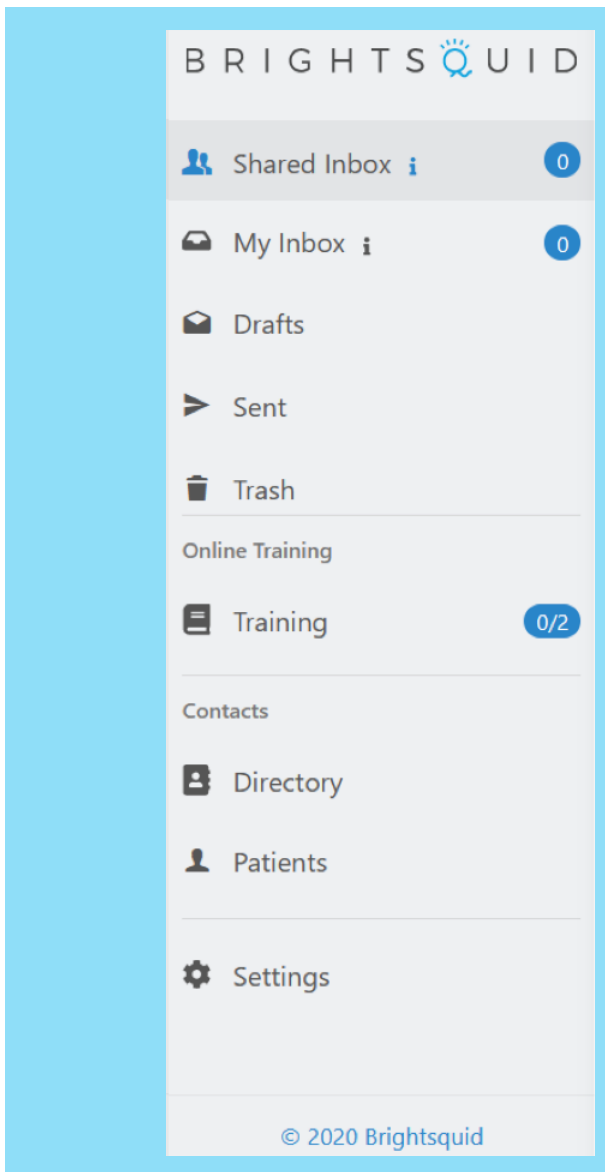
### The process for inviting patients to Secure-Mail is simple.

1. Collect patient email addresses in-person or via a phone call
  - Most clinics store this information in their EMR
2. Send a Secure-Mail message to your patient explaining the purpose of Secure-Mail and the Virtual Front Desk
  - Click 'Compose'
  - Enter the patient's email address in the 'To' field
  - If the patient email address is not recognized, click 'Continue' and 'Invite'
  - Select that you are inviting a patient, and enter their date of birth
  - Compose your message and click send

When your patient accepts the invitation they will create their free account and be able to read your message in just a few clicks to confirm their date of birth, enter their name, and configure a password.

# Appendix C - Toolbar Overview

Within your Secure-Mail account you have access to a primary toolbar that is used to navigate the application. Below is a listing of each button in that toolbar.



- **SHARED INBOX** - Available to team members assigned to the Shared Inbox to view messages from patients
- **MY INBOX** - Access your private inbox, usually reserved for messages from other professional users
- **DRAFTS** - Messages that have been composed but not yet sent
- **SENT** - Messages that have been sent, in this section you can view Read/Unread status of messages and recall messages from a recipient's inbox
- **TRASH** - Deleted Messages
- **TRAINING** - Access training courses assigned to your role. You can also access your certificate of completion from here after you have completed all the modules (and quizzes) in a course.
- **DIRECTORY** - View the Clinic and Personal profiles of all professional users in the Brightsquad community
- **PATIENTS** - View the profiles of all patients in the Brightsquad community
- **SETTINGS** - This section gives access to edit and customize your Personal Profile, Clinic Profile, Clinic members etc...
- **BRIGHTSQUID LINK** - Click this link to review our Terms of Use and Privacy Policies

# Appendix D - Support Resources



Brightsquid hosts a knowledge base of documents and video tutorials for all users.

<https://support.brightsquid.com>

This is also the site where you can find live help via phone, email and live chat, Monday to Friday 8am 5pm (Calgary time). Support resources are available to all users regardless of account or subscription type.

Visit us here Brightsquid Support to learn more about:

Sending a message –

<https://support.brightsquid.com/hc/en-us/articles/360037348611-Get-Started-with-Brightsquid-Secure-Mail>

Recalling a message that was sent in error –

<https://support.brightsquid.com/hc/en-us/articles/360036975912-Message-Recall>

Updating a Patient's Date of Birth –

<https://support.brightsquid.com/hc/en-us/articles/360040177531-How-to-update-a-patient-s-date-of-birth-after-the-invitation-was-sent->



## Appendix E - Who should get access to your Shared Inbox?

- ✓ Front desk staff whose job it is to manage incoming patient inquiries
- Clinicians or doctors who do not need to see every incoming message since most of them are administrative.
- Volunteers and interns since they should get restricted access to which contacts they will be servicing.

### PREPARATION ACTIVITIES:

#### LIST YOUR TEAM MEMBERS WHO WILL BE ASSIGNED TO THE SHARED INBOX:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### ADMINISTERING YOUR VIRTUAL FRONT DESK

1. What are the hours of operation?
2. Who is responsible for monitoring?
3. What are the conventions to ensure messages are actioned and completed?
4. What is the target message response time?

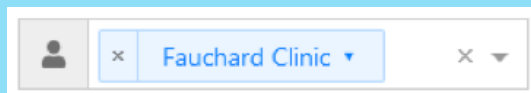
### PRIVATE MESSAGING CONSIDERATIONS:

1. What types of messages are managed in the Personal vs the Shared Inbox?
2. What happens to messages in your Personal Inbox when you are out of office?

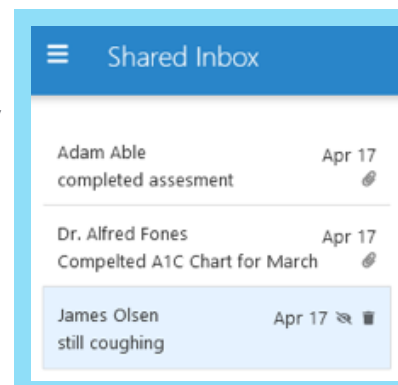
# Appendix F - Secure-Mail Virtual Front Desk Workflows

There are plenty of jobs and tasks that your practice can optimize with Secure-Mail. To get you started creating your workflows, here are examples of how clinics employ their Virtual Front Desk.

## PATIENT REQUESTS AN APPOINTMENT VIA THE VIRTUAL FRONT DESK:



1. Patient composes a message and addresses it to your clinic.
2. A staff member with access to the Shared Inbox will review the message, triage it and route the message. They may choose to forward the message to a member of the team responsible for scheduling.
3. The scheduler will call the patient with a list of available appointment times and book the appointment while on the phone.
4. The scheduler can send the patient appointment details and any required prep documents via Secure-Mail.



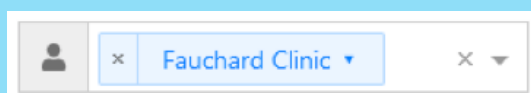
## PATIENT CONTACTS THE VIRTUAL FRONT DESK REGARDING A NEW HEALTH CONCERN:



Using Secure-Mail to communicate with patients offers several benefits for your clinic.

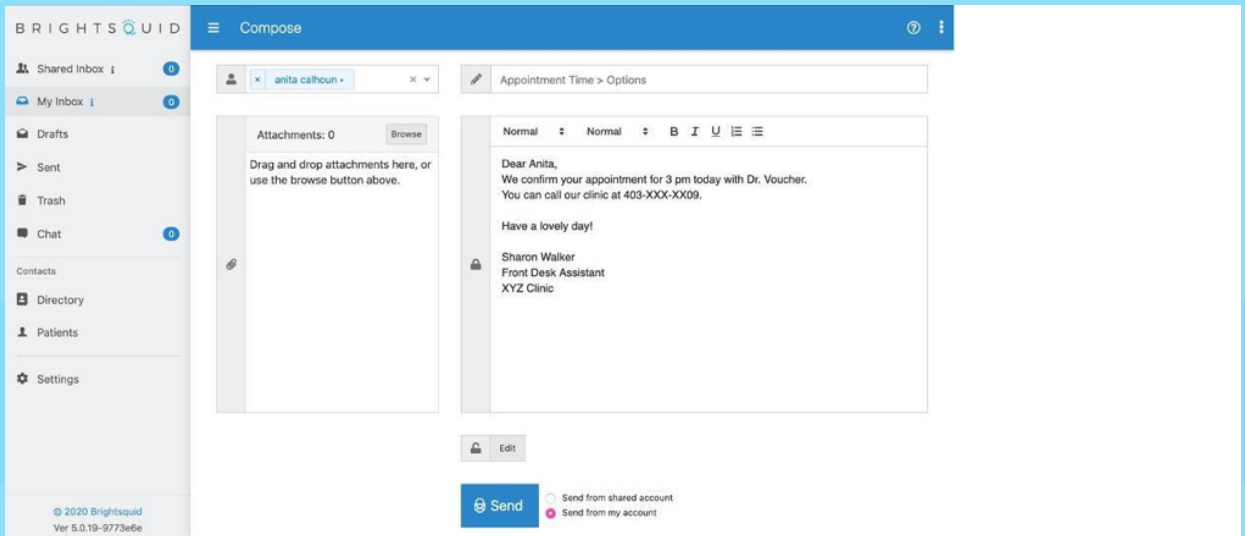
- Front desk staff do not need to retype notes while relaying information about patient concerns to the doctor.
- Staff can triage concerns quickly with a few keystrokes and route the relevant ones to the clinician. This saves time and improves the turn-around-time of addressing a patient's concern.
- Using Secure-Mail for virtual care can reduce phone traffic considerably, allowing the clinic to spend time on more patient-centred activities.

1. Patient composes a message and addresses it to your clinic

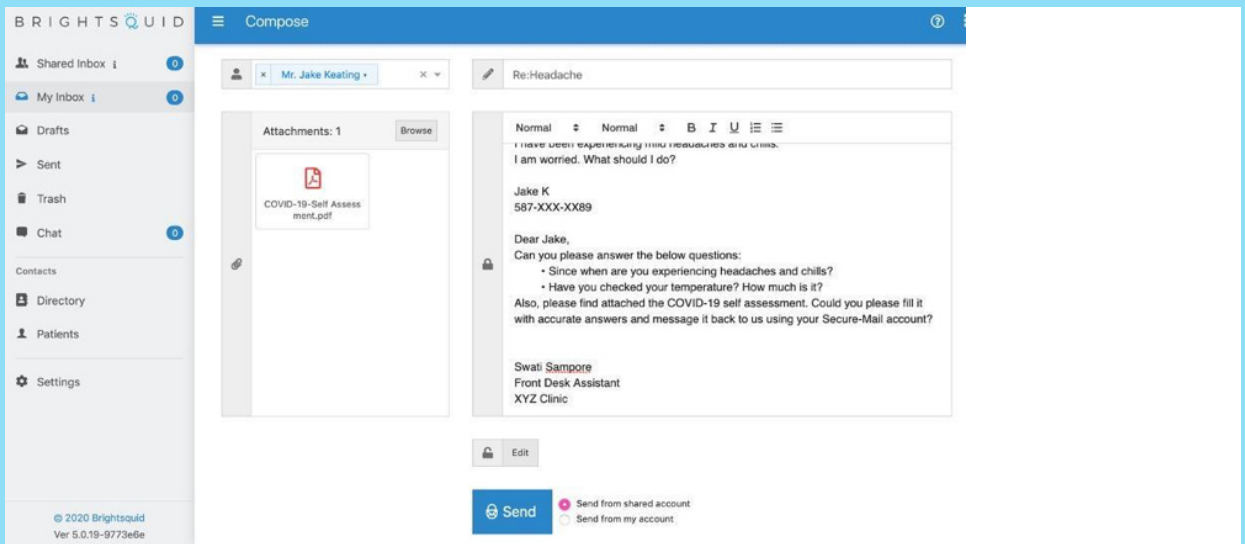


2. A staff member with access to the Shared Inbox will review the message and triage the message.
3. They may choose to:
  - a. Respond directly to the patient with answers to their question

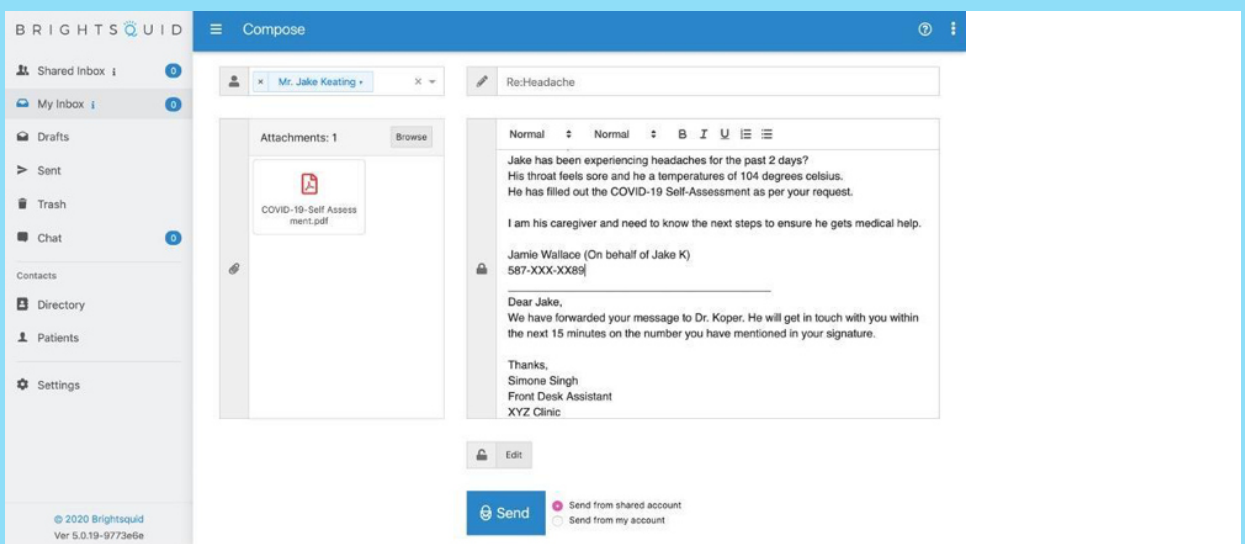
**b.** Respond to the patient and request additional information about the concern



**c.** Forward the message to a Clinician or other team member to handle the issue



**NOTE:** You can answer a patient message by using one of the 3 options:



- Reply - Reply directly to the recipient
- Reply All - This option is used when there are more than one recipients marked on the message that was sent to you (in the event your clinic is engaged with other providers as part of a team)
- Forward - Forward the message to another person - a staff member, clinician, specialist, etc.



Reply Reply All Forward

## PATIENT CONCERN IS FORWARDED TO A CLINICIAN

Patients prefer Secure-Mail to phone and in-person visits for 3 out of 6 standard interactions. You are in charge of which types of patient concerns are appropriate to handle via Secure-Mail. During the pandemic, providing patients the option to connect with their physician remotely with Secure-Mail supports social distancing and maintains continuity of care.

1. Patient composes a message and addresses it to your clinic
2. A staff member with access to the Shared Inbox will review the message and triage and route the message. The message is forwarded to a clinician
3. The clinician is notified of the new message in their Secure-Mail inbox automatically
  - a. Clinician logs into their account and takes appropriate action, either by:
    - i. Direct response to the patient OR
    - ii. Instructs back to the Front Desk to send a specific message to the patient on the clinician's behalf

**\*\*Note that in the case of a direct response to the patient without replying through Shared Inbox, the communication is one-way, the patient may not directly message the clinician\*\***