



BRIGHTSQUID

SECURE-MAIL

# GETTING STARTED GUIDE

# 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".

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      |

The screenshot shows the 'Settings' page for a member profile in the Brightsquad Secure-Mail system. The page is divided into three main sections: Personal Details, Clinic Details, and Clinic Members. The 'Receive Messages' section is expanded, showing four checkboxes: 'Allow patients to message user' (unchecked), 'Allow professionals to message user' (checked), 'Administrator' (unchecked), and 'Enable Shared Inbox' (checked). The 'Shared Inbox' section is also expanded, showing the 'Enable Shared Inbox' checkbox checked. The 'Administrator' section is expanded, showing the 'Administrator' checkbox unchecked. The 'Receive Messages' section is expanded, showing the 'Allow patients to message user' checkbox unchecked, the 'Allow professionals to message user' checkbox checked, and the 'Administrator' checkbox unchecked. The 'Shared Inbox' section is expanded, showing the 'Enable Shared Inbox' checkbox checked. At the bottom right, there are buttons for 'Delete', 'Reset', and 'Save'.

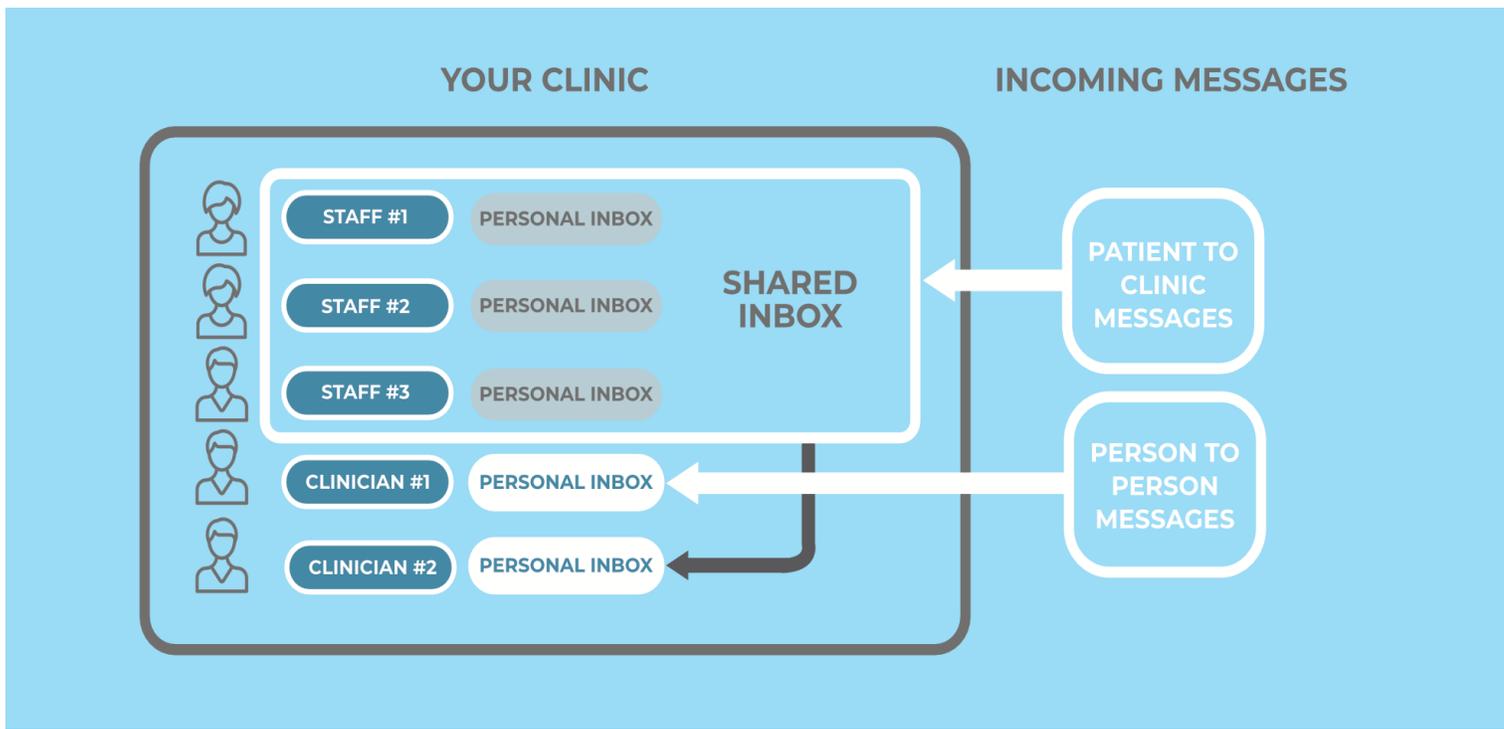
- **RECEIVE MESSAGES** - This box is unchecked by default, instead messages will be routed to the Shared Inbox.
- **ADMINISTRATOR** - This box is off by default. Checking it on will allow that user to carry out administrative tasks within your clinic's Secure-Mail account. More than one person can have 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:

- a. Which role(s) will be assigned as Secure-Mail administrator(s)?
- b. 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.