

# TELUS Health Community Portal Guide

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## TELUS Health Community Portal

The TELUS Health Community Portal is a web portal designed for physicians, clinicians, clinic managers and administration staff who use TELUS Health electronic medical records (EMR) software. On the community, you can:

- Create groups, share best practices and interact with your peers within the Chatter social networking feature.
- Submit suggestions for new Ideas and enhancement requests for your EMR. Vote and comment on other people's suggested Ideas.
- Search for answers to your questions. If you don't find the answer, you can post your questions in the Q&A section and receive answers from TELUS Health or other community users.
- Request support by creating new Cases or tracking your existing open Cases.

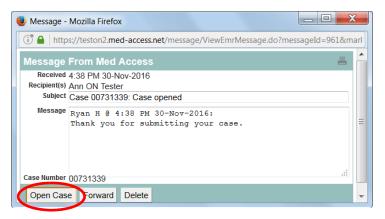
## Accessing the portal

You access the community portal through the Med Access **EMR Messenger** in one of the following two ways.

In the top right corner, click the portal icon and choose **Community Portal**. This opens the **Home** tab of the portal.



Or, if you have received a message from the community portal regarding a support case, click the **Open Case** button within the message. This opens the case's details in the portal. For more information, see "Cases" on page 20.



No login is required.

#### Set up your community profile

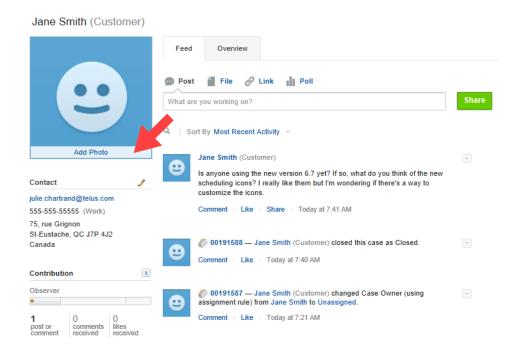
Set up your community personal profile to upload a photo and update your contact information and preferred language. This makes it easy for others portal users to contact or recognize you.

#### **Steps**

1. Click your user name in on the top right corner of the screen and then click My Profile.



2. Upload a photo:



Hover your mouse over the happy face icon and click Add Photo.

- Browse to your photo on your computer, select it, and save it.
- 3. Add or edit your contact information.
  - Next to Contact, click the pencil icon 🗸.
  - In the About and Contact tabs, add the information that you want to share. If you want to share your contact info with all community users, choose the External option. To make your information available only to TELUS Health employees, choose Employees.



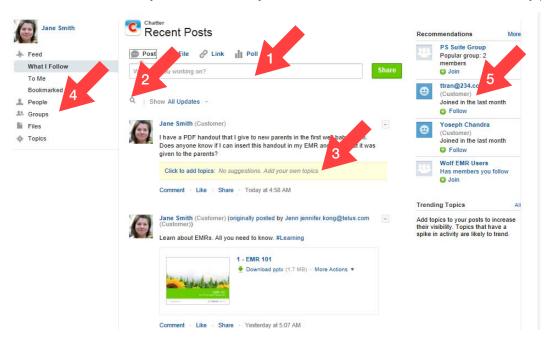
- 4. View your profile and portal activities:
  - Click the Overview tab to view your activity within the Q&A and Ideas sections, view which groups you belong to, and see who's following you and who you are following.
  - Click the Feed tab to see your Chatter feed or to post an update.

## Chatter

Chatter is a social networking tool within the TELUS Health Community Portal and enables you to post information with other users and to follow other users, similar to Facebook, Twitter, and Linkedln.

You see a feed of users' posts, and you can comment and join in discussions. You can share files, join groups, and follow other users.

You also see a feed of your Cases activity within the Chatter section of the community portal.



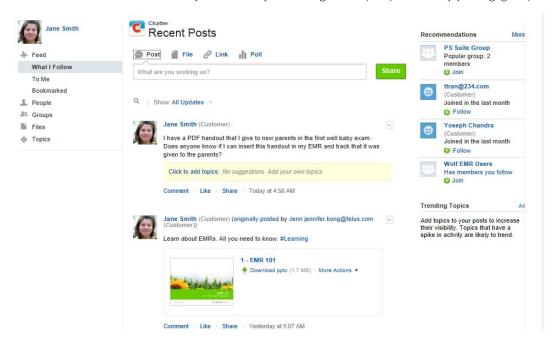
- 1. Post a new tip, thought, or conversation and then **Share** it. You can also choose to post a file, link, or poll.
- 2. Search for information within Chatter.
- 3. After you add content, add **Topics** so that other users can easily find the information.
- 4. Change what you see in your feed. You can search for **People** in the community and then choose to follow them to see what they post. See who you follow and recommendations of who to follow.

- See what active **Groups** exist and join groups. See all **Files** that were shared by other users within the community.
- 5. Chatter provides **Recommendations** to help you identify the people, groups, files, and records that closely relate to your job and interests. The more recommendations you accept, the more updates you see in your feed.

## Viewing your feed

Your feed is the list of conversations that appears when you go to the Chatter section. By default, you see a chronological list of all of the content that was shared by people that you follow, shared to one of your groups, or shared directly with you (with an @ mention).

You can add more content in your feed by following more people and by joining groups.



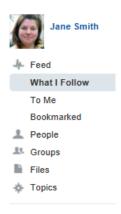
#### **Tips**

- Comment on, Like, or Share a conversation in your feed using the links below that conversation.
- Use the **Recommendations** on the right side of Chatter to discover new people and content. Click **Follow** next to the person, record, or file you want to follow.
  - Click **Join** to become a group member.
  - Click More to see an even longer lis of recommendations.

■ To find a post later, click the arrow next to a post and **Bookmark** it.



■ Change what you see in your feed. In the left side of Chatter, choose to view people, groups, files, or content by topics.

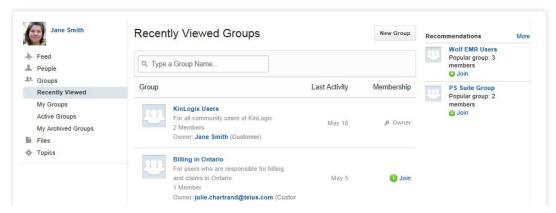


## Joining and creating groups

Join an existing group or create a new group to participate in special-interest discussions and collaboration and to see more content in your Chatter feed. You see all of your groups' posts within your Chatter feed.

#### **Steps**

1. To see available groups, to join a new group, and to create a new group, click **Groups** in the left menu.



- 2. To create a new group, click **New Group**, name your group and provide a description so that other users know what you will discuss in this group. If you make a group private, you must manually accept new members. Anyone can join a public group.
- 3. To join an existing group, click **Active Groups** in the left menu to see all group. Then, click **Join** or **Ask to join** (for private groups).

#### Posting an update

You can quickly share a tip, ask a question, and share a file or link with other portal users. The people who follow you or are in the same groups as you will see what you post within their Chatter feeds. People can then comment on your post and engage in a conversation right in the feed.

If someone does not follow you or is not in the same groups as you, they can still see what you have posted by viewing your profile from the People section of Chatter or by searching within Chatter. Posts made in a private group can only be seen by members who are in that group.

#### **Tips**

 Use hashtags (#) in your posts so that others can easily find information and to categorize your posts (e.g., #MCEDT or #billing).

Type # and the word that you want to tag and then press Enter {Return} to add it.



■ Use @ mentions to loop people into conversations and to directly mention them. Maybe you want to say thank you to another community user for sharing useful information (e.g., Thank you @Jane for sharing your stamp!).

Type @ and part of the user's name. A list of users will appear. Click the user to add him or her.



## Sharing files

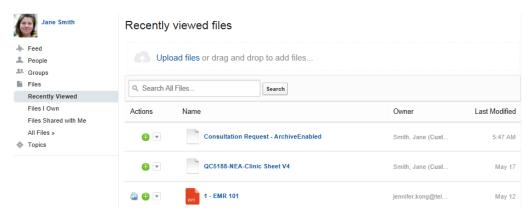
You can post a file that you want to share with other community users. For example, you can post a form, stamp, handout, or presentation.

#### **Steps**

1. In your Chatter feed, click **File** and then select to **Upload a file from your computer**. Select the file, type a description, and then **Share** the file.



2. To see all files that were shared in Chatter, click Files in the left menu.



3. From the **Actions** column, you can choose to download the file, share it, or upload a new version.

#### Searching for information in Chatter

Over time, your Chatter feed will become quite long. You can search your Chatter feed to find content that was already posted. You can also search for information that was posted by others and that does not appear in your feed.

#### Steps

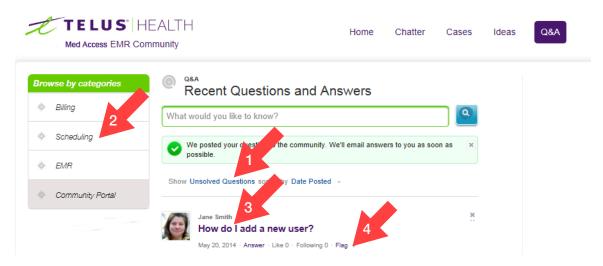
1. In your feed, click the search button and then type your search terms.



- 2. If no matches are found in your feed (people you follow and groups that you belong to), you have the option to search all feeds.
- 3. Once you find what you are looking for, you can **Bookmark** it to easily find it later.



Do you have a question about your EMR? The **Q&A** section is where you can search for answers to your question. If you don't find the answer, you can post your questions and receive answers and comments from other users or from TELUS Health staff.



By default, you see all questions sorted by the date when they were posted. You can use the categories in the left menu to filter the questions that you see.

- 1. Use the filters below the question field to show only certain types of questions.
  - Most Popular questions are the ones that received the most "likes" within a certain amount of time.
  - Solved Questions are questions that received an answer and the person who asked the question (or TELUS Health) marked one of the replies as the "best answer". The best answer appears directly below the question and above other replies. Best answers help other community users with the same question quickly find the most relevant and useful information.
  - My Questions shows only the questions that you asked.
- 2. Use the categories on the left to show only questions for that area.

- 3. Click a question to see its details and answers. Like a question to vote for it. The numbers show how many people like or follow that question. You can also flag inappropriate content for moderators.
- 4. If you know the answer or want to show your support for a question, use the links below the question.

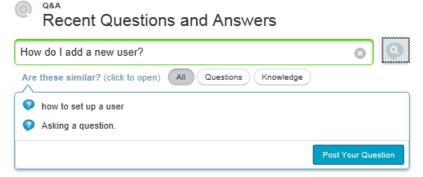
When you **Like** a question, it ranks higher in popularity. If you notice inappropriate activity, you can **Flag** it for TELUS Health staff.

## Asking a question

When you ask a question in the **Q&A** section, the portal provides a list of suggested answers from answers to other questions and from the vast database of knowledge articles. If you don't find an answer to your question, you can post your question to the community and receive answers and comments from other users or from TELUS Health staff.

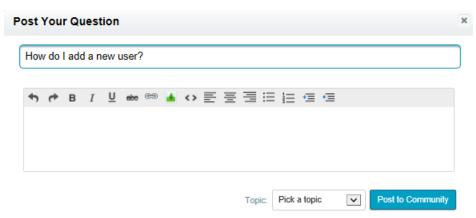
#### **Steps**

1. From the Q&A section, type your question in the text box and click the button.



2. A list of possible answers appears. If one answers your question click it, otherwise, click Post Your Question.

3. If you post your question, type your full question (use the buttons to format it, if you want), choose a topic that most matches your question, and then click **Post to Community**.

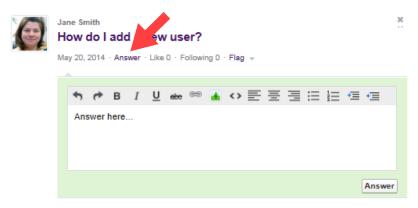


4. Your question now appears and is ready for an answer.

#### Answering or commenting on a question

If you know the answer to someone's question, go ahead and answer it or add your comments. Other users can vote for your answer by liking or disliking it.

Under the question, click the **Answer** link. Type your answer and then click **Answer**.

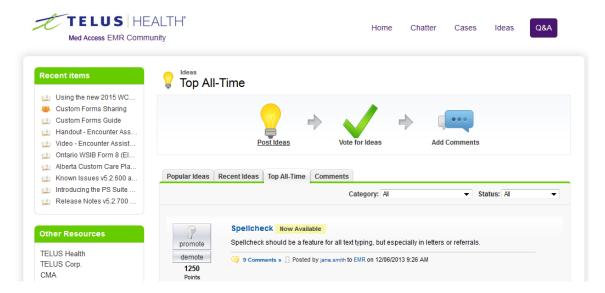


To see if someone answered your question, filter the questions to show only My Questions.

## Ideas

Have an idea for improving your TELUS Health EMR? Do you want to request an enhancement or a new feature? In the **Ideas** section, you can post, vote for, and comment on ideas for your EMR.

Once you post an idea, other users can vote on it and add comments. Each vote adds 10 points to an idea and comment activity increases its ranking level. The number of votes and comment activity may help this idea become a reality in the software.



- The **Popular Ideas** tab sorts the ideas by an internal calculation that reflects the idea's positive votes and their age. Ideas with newer positive votes display higher on the page than ideas with older positive votes. This allows you to browse ideas that have most recently gained popularity, followed by older ideas that received positive votes in the past.
- The Recent Ideas tab sorts the ideas by date submitted and shows the most recent ones at the top.
- The **Top All-Time** tab sorts ideas by the number of points. This allows you to see the most popular ideas since the inception of the community.
- The **Comments** tab lists the comments received that were most recently submitted. You can also view all the comments for a particular idea by clicking that idea.

Change the **Category** filter (below the tabs, on the right side) to show only ideas that are related to an area of the EMR.

Change the Status filter to show only ideas that are in a specific product development cycle.

Click an idea to view the details and comments from other users.

#### Status of ideas

When TELUS Health reviews and evaluates ideas for inclusion in the product development process, we will update the status of the idea accordingly. The status lets you know where the idea stands and when you can expect an update. Here are the definitions of each available status:

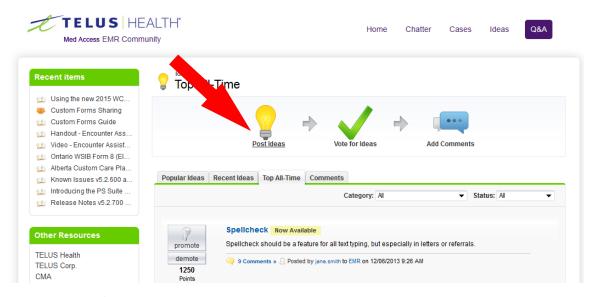
- **New**: The idea is newly submitted and has not yet been reviewed by the TELUS Health product management team.
- Under Review: The TELUS Health product management team is currently reviewing and considering the idea for inclusion on our roadmap. The idea will be reviewed and updated in the future. Please note that feature and product plans are always subject to change.
- On Roadmap: The idea is on our roadmap for an upcoming release, however development work has not yet started and a release date or version has not yet been set. The idea will be updated when development work has started. Please note that feature and product plans are always subject to change.
- In Development: The idea is on our roadmap for an upcoming release and development work has started. An exact release date or version may not yet have been set. The idea will be updated when the feature is available and ready for delivery. Please note that feature and product plans are always subject to change.
- Now Available: The idea is delivered and is generally available. No further updates will be made to the idea.
- **Existing Feature**: The idea is a feature that already exists in the product. No further updates will be made to the idea.
- Not Planned: The idea has been declined and is not planned or being considered for our short or long term roadmap. No further updates will be made to the idea unless future roadmap plans change.

## Posting an idea

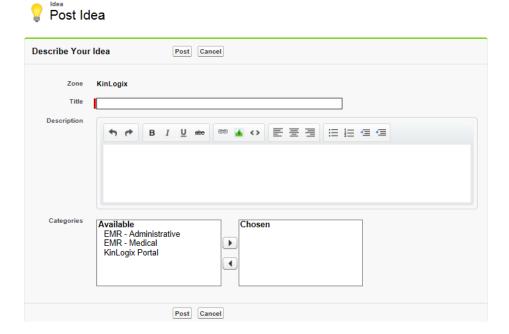
Post an idea so that TELUS Health can consider adding it in future releases of the software and to generate discussions with other users of the community. When you post an idea, it appears at the top of the **Recent Ideas** tab and your vote (promote) with 10 points is automatically applied to the idea.

#### **Steps**

1. From the Ideas section, click Post Ideas.



2. Type a title. If similar ideas were already posted, a list appears below your title.



If one looks similar to yours, click it to view it in a new window. You can read a description of the idea and vote for it and add a comment instead of posting your duplicate idea to the community.

If none of the ideas in the list are similar to your idea, proceed with the following steps to post your unique idea.

- 3. Add a description. You can format the text, add an image and include a link to a web site.
- 4. Choose one or more categories for your idea and click Post.

## Voting for an idea

If you like an idea, click **Promote** to show your support. Each vote adds 10 points to an idea.



You cannot promote or demote the same idea more than once and you cannot promote an idea that you have already demoted or demote and idea that you have already promoted. Demoting removes 10 points.

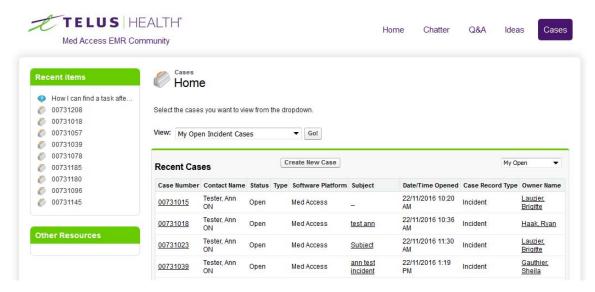
An idea can have negative overall points if more users demote the idea than promote it.

To see the last 100 people who voted on an idea, click the idea and scroll to the bottom.

## Cases

If you cannot find answers in the Community Portal, the support team can help you resolve your EMR issues. From the **Cases** area, you can access the EMR support team online to create new support cases and to update or view the progress of your existing cases.

**Note:** Do not use the Community Portal to report urgent issues that require immediate help. If your EMR becomes inaccessible from your clinic location, please call our support team.



You can change the **View** to filter the cases:

- All Incident Cases: All cases, whether new, open, or closed, related to an incident, issue, or problem, related to your EMR.
- All Service Request Cases: All cases, whether new, open, or closed, related to various service requests, such as additional training, adding providers, and requests for additional services.
- Incident Cases Linked to a Problem: See "Cases resulting in a software problem" on page 22.
- My Open Incident Cases: Cases that you logged that are still open and are related to an issue or problem related to your EMR.

- My Open Service Request Cases: Cases that you logged that are still open and are related to various service requests, such as additional training, adding providers, and requests for additional services.
- **Recently viewed cases**: Cases that you recently viewed in the portal.

#### What cases can I see?

By default, you see only cases and service requests that you have personally created or logged with the support team (through the community portal and by telephone or email). You don't see the ones logged by other users in your office.

If you are a clinic administrator and you need to see and manage all cases logged by all users in your office (or in multiple offices), contact the EMR support team so that your community portal permissions can be changed.

#### **Med Access EMR**

You see all cases or service requests created in 2016 and onwards.

## EMR Messenger notifications for cases

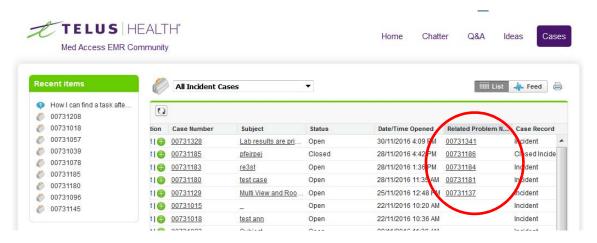
You receive the following notifications from the TELUS Health Community Portal within your Med Access **EMR Messenger**:

- When you open a new case (to confirm that we have received and opened your case)
- When TELUS Health adds a new comment to your case
- When TELUS Health closes your case. We provide closure comments to let you know how your case was resolved.

In all instances, the message includes a link for you to view the details of your case on the portal.

## Cases resulting in a software problem

If your case results in a software problem (a bug) that will be fixed in a new version of the EMR, you will see a related problem number and a related problem status next to your case.



In some instances, TELUS Health will provide a workaround to the problem, so that you can continue to use the functionality (with a few extra steps) until the problem is fixed in a future version. When a workaround is available, TELUS Health will close your case. The defect will be tracked through a new software problem ticket until the defect is resolved in a new release of the EMR.

#### Creating a new case

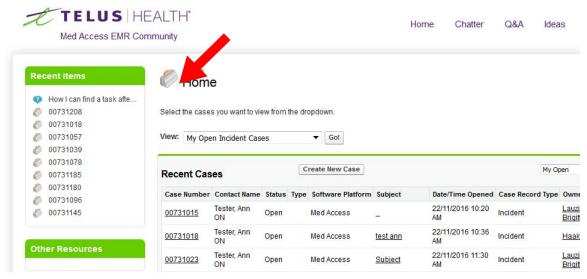
Create a new case to log a new issue with the support team. Please provide us with as much information as possible so that we can resolve your issue in a timely manner.

- When and where in the EMR did the problem occur?
- Was there an error message? What did it say?
- What is the desired outcome of the task(s)?
- If you have a request or inquiry, please include all of the related information.

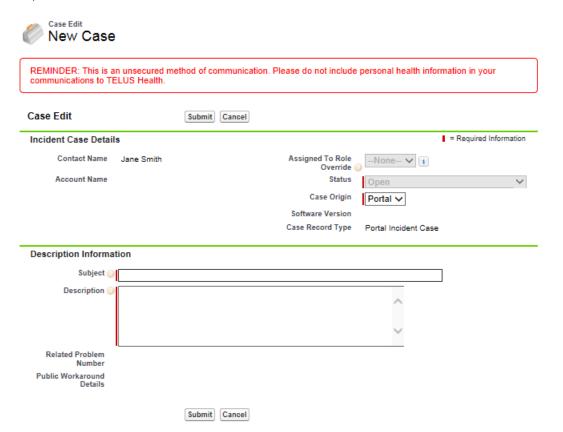
**Note:** Do not use the community portal to report urgent issues that require immediate help. If your EMR becomes inaccessible from your clinic location, please call our support team.

#### **Steps**

1. From the Cases area, click Create New Case.



2. Type a summary of your issue as the subject and a detailed description. Be as descriptive as possible.



3. Click Submit.

After you submit your case, it is assigned a case number.

## Viewing and editing a case

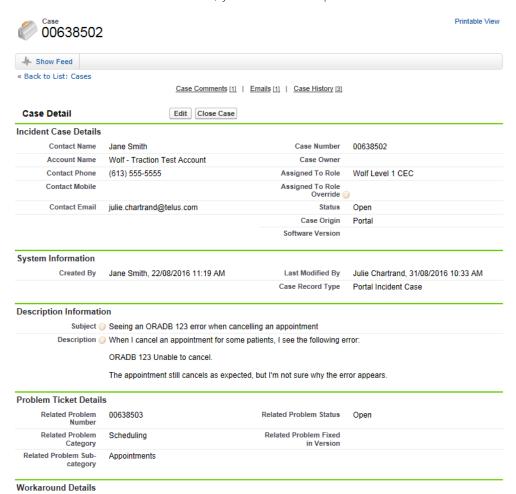
View a case to see the details of its status and any comments or workarounds provided by the support team. You can also edit your cases's subject and description and add new comments.

#### **Steps**

- 1. In the Cases area of the community portal, click the case number to open it.
- 2. Review the case details.

**Tip:** Click **Show Feed** near the top left to open or collapse the day-by-day feed related to the case.

- If your case resulted in a defect within the EMR, an additional problem number is assigned to your cases.
- If a workaround is available, you can see the problem workaround details.



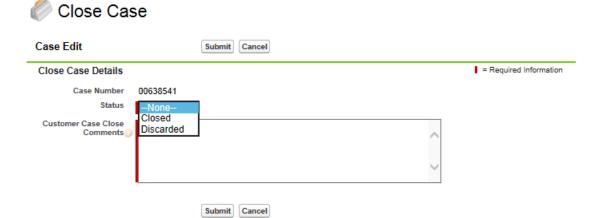
 To add a comment and communicate additional information to the support team, click Add Comment. Any changes will be visible to the support team members who are investigating your issue. 4. To edit the case subject or description, click Edit.

#### Closing a case

If you end up resolving your issue on your own or if you created a case in error, you can close it.

#### **Steps**

- 1. In the Cases area of the community portal, click the case number to open it.
- 2. Click Close Case.



- 3. In the Status field, choose one of the following:
  - Closed to indicate that you found your own solution.
  - **Discarded** to indicate that you logged the case in error.
- 4. In the comments field, type a description to let us know why you are closing you case.
- 5. Click Submit.