

Community portal User Guide

OACIS

Septembre 2015



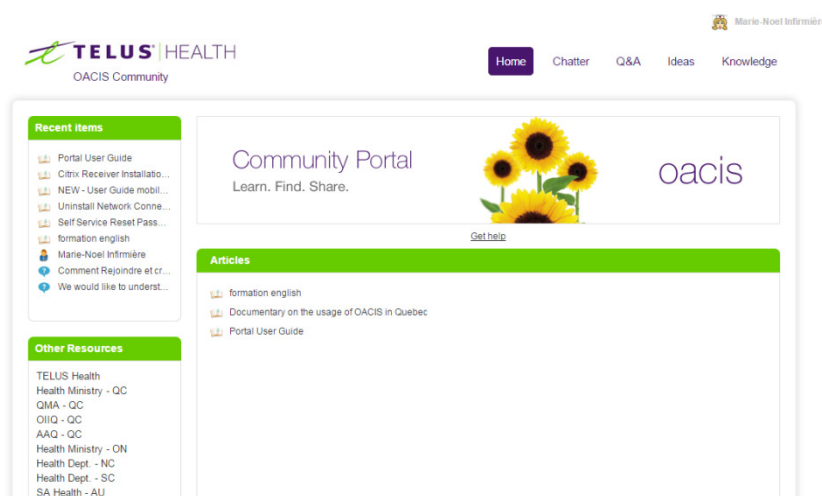
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TELUS Health Community Portal

The TELUS Health Community Portal is a web portal designed for physicians, clinicians, clinic managers and administration staff who use TELUS Health OACIS. 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 OACIS. Vote and comment on other people's suggested Ideas.
- Get informed by having access to frequently asked questions and Knowledge articles. Access training materials such as videos, webinars recordings, learning aids, release notes and user guides.
- 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.



Registering

You can register for the Community Portal from the main login page. Your email address is used as your user name and each person must register with a unique email address.

Steps

1. On the main portal page, under Don't have an account? Register now, type your email address and click Register.

TELUS HEALTH

Welcome to the TELUS Health Community Portal

Q&A
Ask questions and look up answers to frequently asked questions.

Ideas
Submit and evaluate suggestions to enhance your EMR.

Knowledge
Find training materials and information bulletins.

Chatter
Collaborate with colleagues, share files, and join groups.

Secure customer login

Email:

Password:

[Forgot your password?](#)

Don't have an account? Register now

Email:

[Get Help](#)

2. If TELUS Health already has your email address in our records, simply choose OACIS and then click Submit.

You will receive an email from TELUS Health with a link to set your password and confirmation of your user name (your email address).

Email address:
none@none.com

EMR:

| |
|----------|
| PS Suite |
| Wolf |
| Kinlogix |

3. If TELUS Health does not have your email address in our records, choose OACIS, complete all of the fields in the registration form and then click Submit.
Within 24 hours, you will receive an email from TELUS Health with a link to set your password and confirmation of your user name (your email address).

First time login

After you are registered, click the link in the registration email that you received. You will be prompted to set your password. Choose a password that is at least 5 characters long and that you can remember. If it helps, write it down somewhere so you can refer to it.

Set or reset your password.

A screenshot of a web form for setting or resetting a password. It features two input fields: the first is labeled 'New password:' and the second is labeled 'Verify new password:'. Below these fields is a green button with the text 'Change password'.

If you forget your password

If you ever forget your password, on the main login page, click the [Forgot your password?](#) link. Submit your email address and you will receive an email from TELUS Health with a link to reset your password.

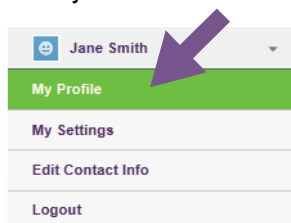
You can also change your password at any time (click your user name in on the top right corner of the screen and then click [My Settings > Security Settings](#)).

Set up your community profile

Set up your community personal profile to upload a photo and update your contact information and preferred language.

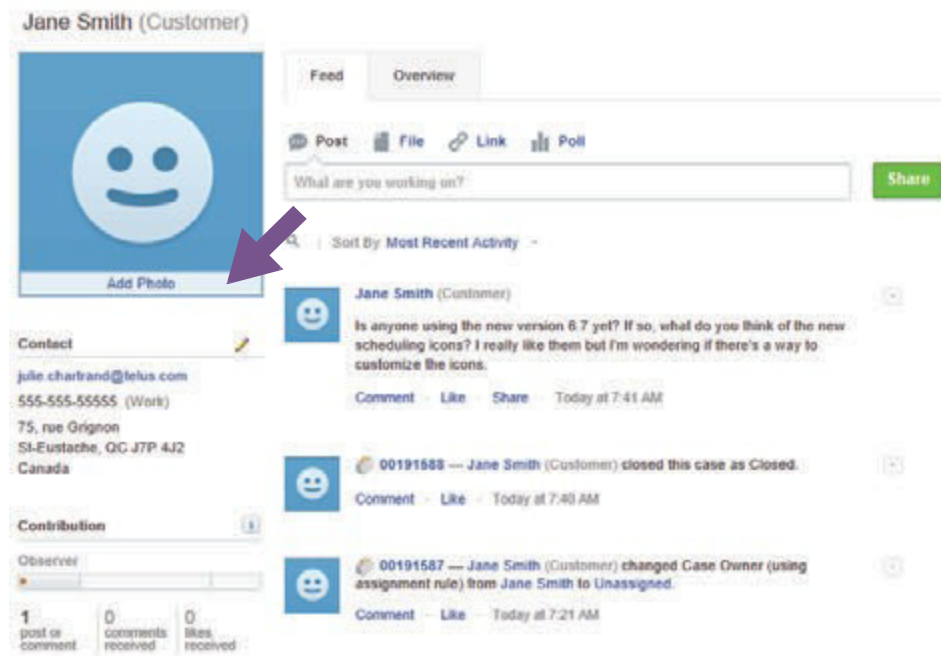
Steps

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.

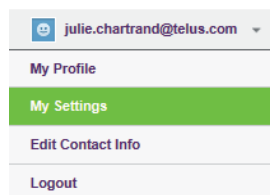
Set your email notification settings

By default, you receive email notifications for all activities that happen within Chatter and that relate to you (e.g., when someone follows you, mentions you in a post, comments on a post, etc.). You can change these settings to receive less or no email notifications for Chatter activities.

Important: You also receive email notifications whenever you post a new Idea and whenever other users comment on your idea. And, you receive email notification when other users answer a question that you asked in the Q&A section. You cannot turn off these email notifications.

Steps

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



2. Click Email Settings.



3. Specify when you want to receive email notifications related to your Chatter feed. These settings control only the activities within your Chatter feeds in the Community Portal. You will still receive system-related emails (i.e., password changes) and product emails from TELUS Health and email notifications for responses to Ideas and Q&As that you posted.

 A screenshot of the 'Email Settings' dialog box. It has a title bar 'Email Settings' with a close button. The main content area starts with the text 'Choose to receive Telus Health Community emails so you don't miss important updates.' followed by a checked checkbox 'Receive emails'. Below this are three sections of settings:

- Follows**: 'Follows me' (checked).
- Posts or Likes**: 'Posts on my profile' (checked), 'Shares a post I made' (checked), 'Likes a post or a comment I made' (unchecked).
- Mentions, Messages, or Endorsements**: 'Mentions me in a post' (checked), 'Mentions me in a comment' (checked).
- Comments**: 'Comments on my status or a change I made' (checked), 'Comments on a post on my profile' (checked), 'Comments after me' (checked), 'Comments on an item I bookmarked' (checked), 'Comments on an item I like' (checked).

 At the bottom, there is a table for 'Groups' with columns 'Groups' and 'Frequency'.

| Groups ↑ | Frequency |
|--------------------|------------------|
| Billing in Ontario | Weekly Digests ▼ |
| PS Suite Users | Weekly Digests ▼ |

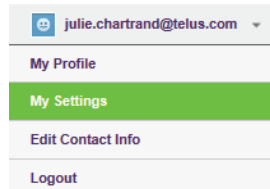
 Below the table are 'Save' and 'Cancel' buttons.

Changing your language preferences

You can change the default language of the TELUS Health Community portal. Note that content (i.e., knowledge articles) may not always be available in your language.

Steps

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



2. Click Location Settings.

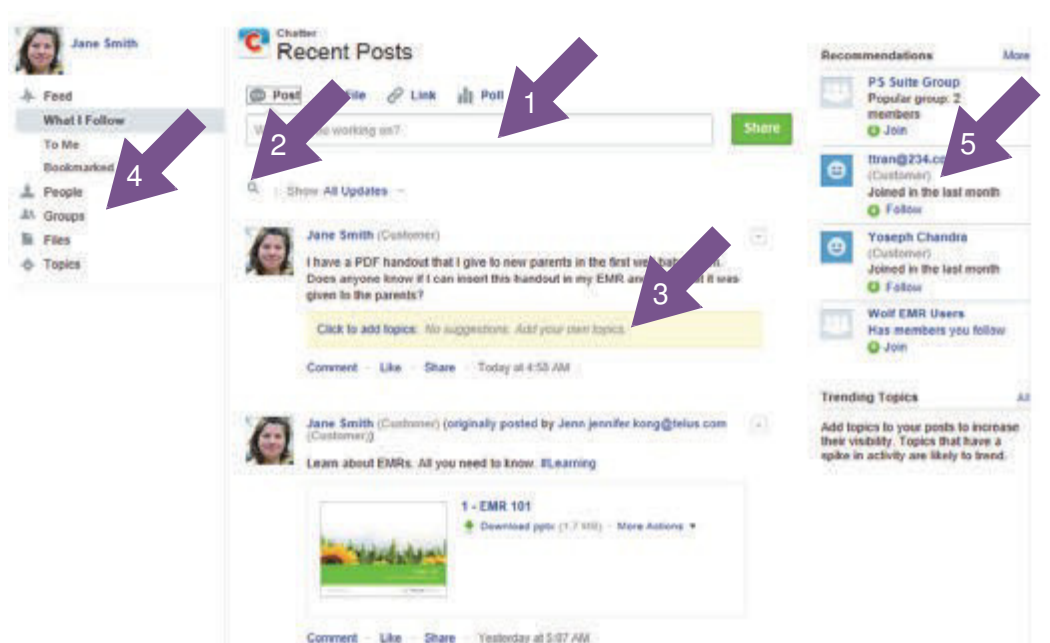


3. Choose your new language and locale and then save your change.

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 LinkedIn.

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

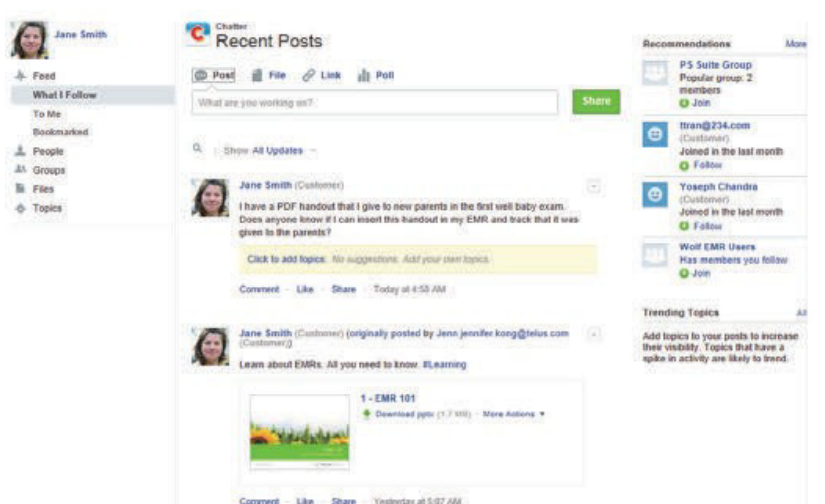


1. Post a new tip, thought, or conversation and then Share it. You can also choose to post a file, link, or poll.
2. Search for information within Chatter.
3. After you add content, add Topics so that other users can easily find the information.
4. Change what you see in your feed.
 You can search for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

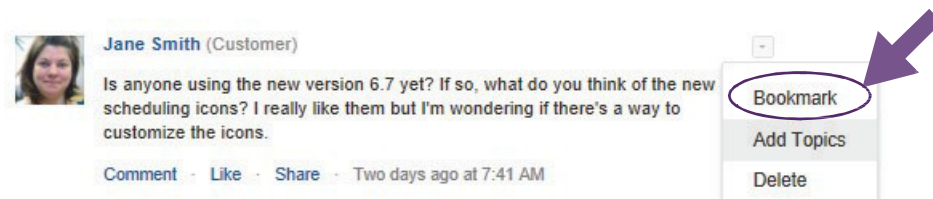
Your feed is the list of conversations that appears when you go to the Chatter section. By default, you see a chronological list of all of the content that was shared by people that you follow, shared to one of your groups, or shared directly with you (with an @ mention).

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

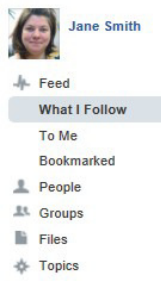


Tips

- 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 list 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.

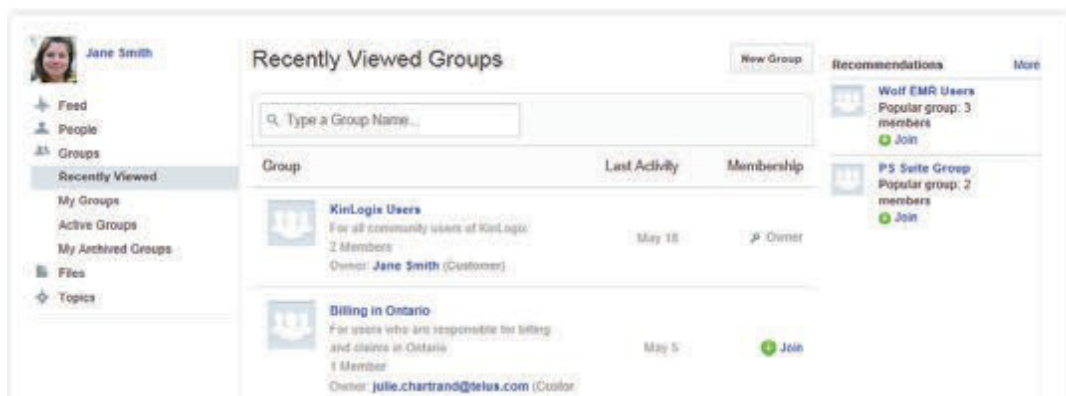


Joining and creating groups

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. You will receive an email when someone asks to join your group. 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). If you asked to join a private group, you will receive an email when the group owner adds you to his or her group.

Posting an update

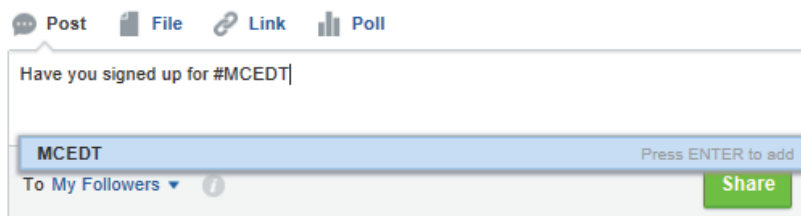
You can quickly share a tip, ask a question, and share a file or link with other portal users. The people who follow you or are in the same groups as you will see what you post within their Chatter feeds. People can then comment on your post and engage in a conversation right in the feed.

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

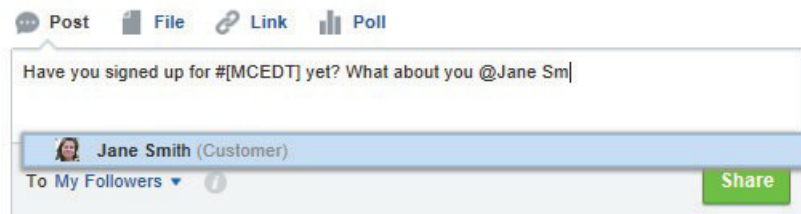
- Use hashtags (#) in your posts so that others can easily find information and to categorize your posts (e.g., #MCEDT or #billing).

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.

The screenshot shows the 'File' tab selected in the Chatter feed. It features two buttons: 'Select a file from Chatter' and 'Upload a file from your computer'. Below these is a text area labeled 'Say something about this file...'. At the bottom, there is a dropdown menu set to 'To My Followers' and a green 'Share' button.

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

The screenshot shows the 'Files' section in Chatter. On the left is a sidebar with navigation options: Feed, People, Groups, Files, Recently Viewed, Files I Own, Files Shared with Me, All Files, and Topics. The 'Files' section is active, displaying a 'Recently viewed files' header. Below the header is a search bar and a table of files.

| Actions | Name | Owner | Last Modified |
|---------|---------------------------------------|----------------------|---------------|
| | Consultation Request - ArchiveEnabled | Smith, Jane (Cost... | 5:47 AM |
| | QC5186-NEA-Clinic Sheet V4 | Smith, Jane (Cost... | May 17 |
| | 1 - EMR 101 | jennifer.kong@tel... | May 12 |

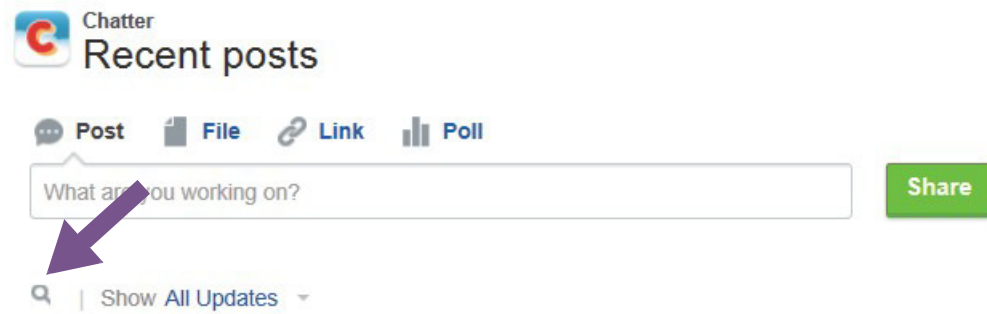
3. From the Actions column, you can choose to download the file, share it, or upload a new version.

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

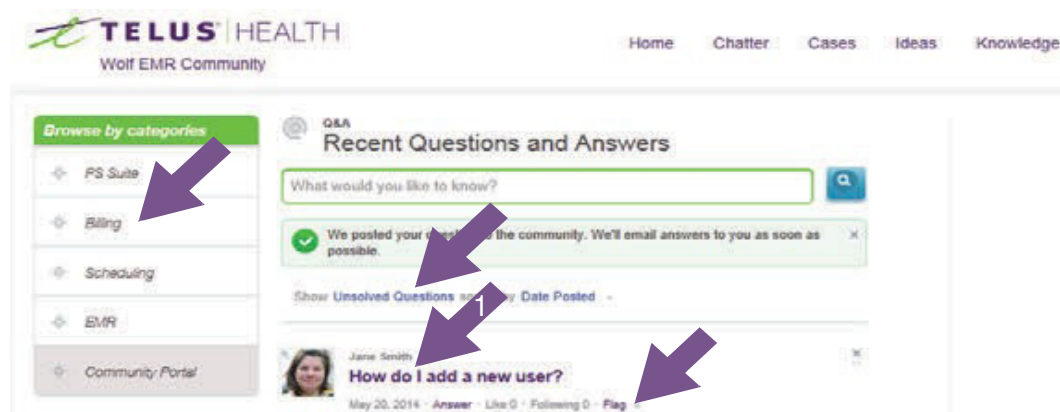
1. In your feed, click the search button and then type your search terms.



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.

Q&A

Do you have a question about OACIS? 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.
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. Follow a question to receive email notifications when it is updated. 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 Follow a question, you will receive email notifications whenever someone posts an answer. To stop receiving email notifications about this question, go back to it and Unfollow it.

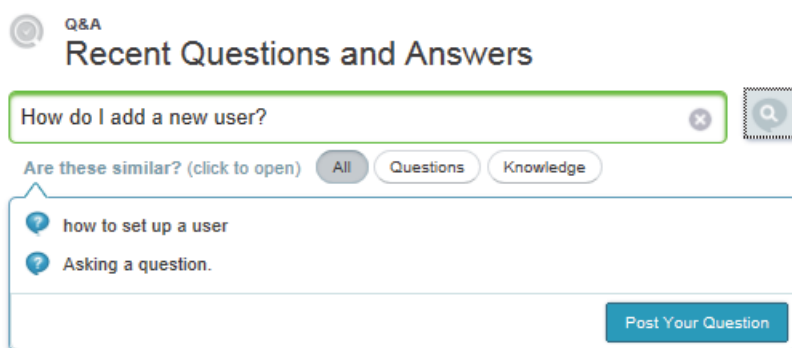
When you Like a question, it ranks higher in popularity. If you notice inappropriate activity, you can Flag it for TELUS Health staff.

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.



Q&A

Recent Questions and Answers

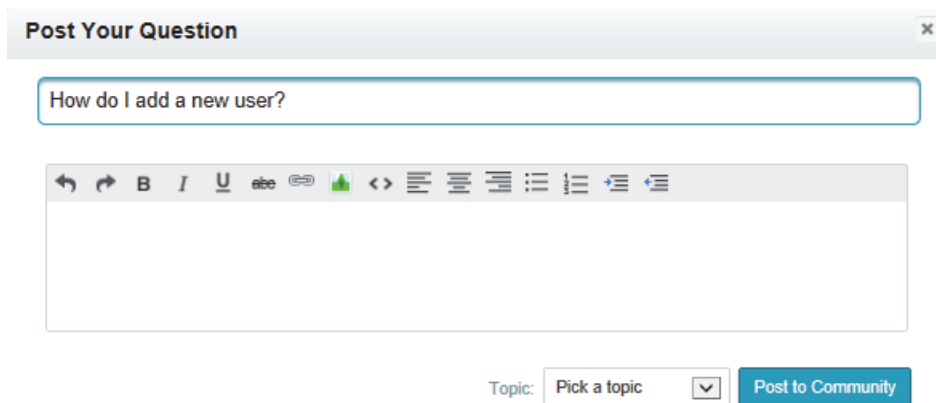
How do I add a new user?

Are these similar? (click to open) All Questions Knowledge

- how to set up a user
- Asking a question.

Post Your Question

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.



Post Your Question

How do I add a new user?

Rich text editor toolbar: Undo, Redo, Bold, Italic, Underline, Link, Unlink, Insert Image, Code, Bulleted List, Numbered List, Indent, Outdent, More options.

Topic: Pick a topic

Post to Community

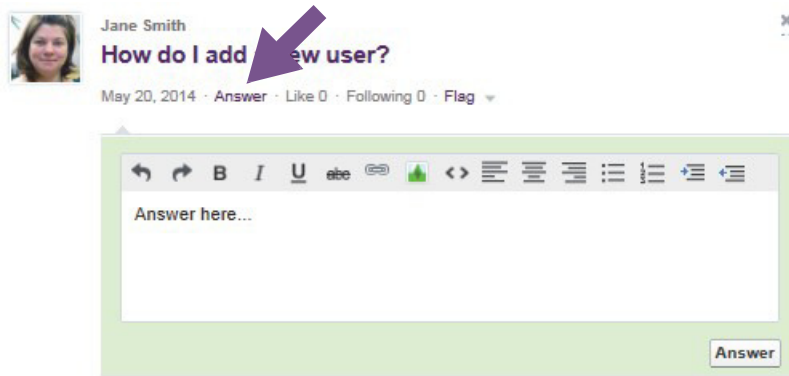
4. Your question now appears and is ready for an answer.

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.

The person who asked the question and people who are following the question will receive an email notification with your answer.



Email notifications for questions

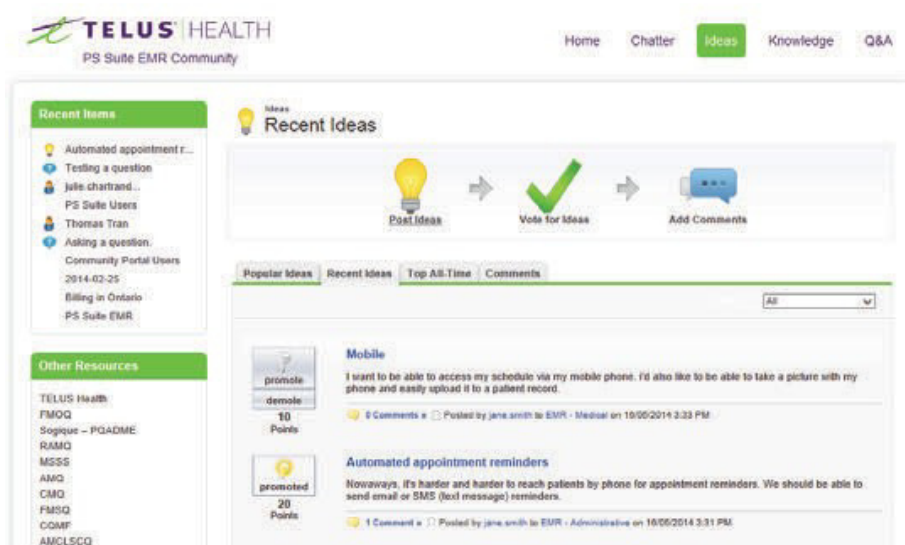
When you post a question, you will always receive an email notification when someone posts an answer or comment to your question. You cannot turn off these email notifications.

If you Follow someone else's question, you will also receive an email notification. You can Unfollow a question to stop receive email notifications.

Ideas

Have an idea for improving OACIS? 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 OACIS.

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 OACIS.

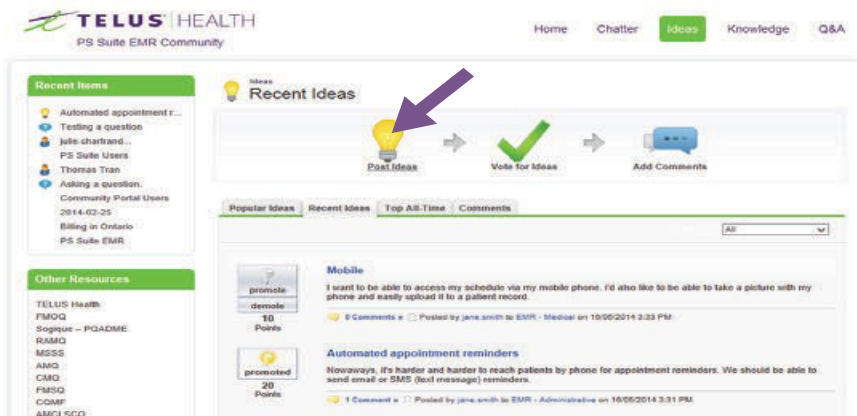
Click an idea to view the details and comments from other users.

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.



Describe Your Idea [Post] [Cancel]

Zone: KinLogix

Title:

Description:

Categories:

| Available | Chosen |
|----------------------|--------|
| EMR - Administrative | |
| EMR - Medical | |
| KinLogix Portal | |

[Post] [Cancel]

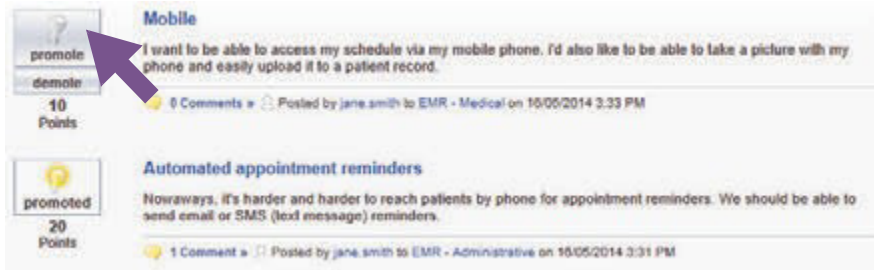
If one looks similar to yours, click it to view it in a new window. You can read a description of the idea and vote for it and add a comment instead of posting your duplicate idea to the community.

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 an 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.

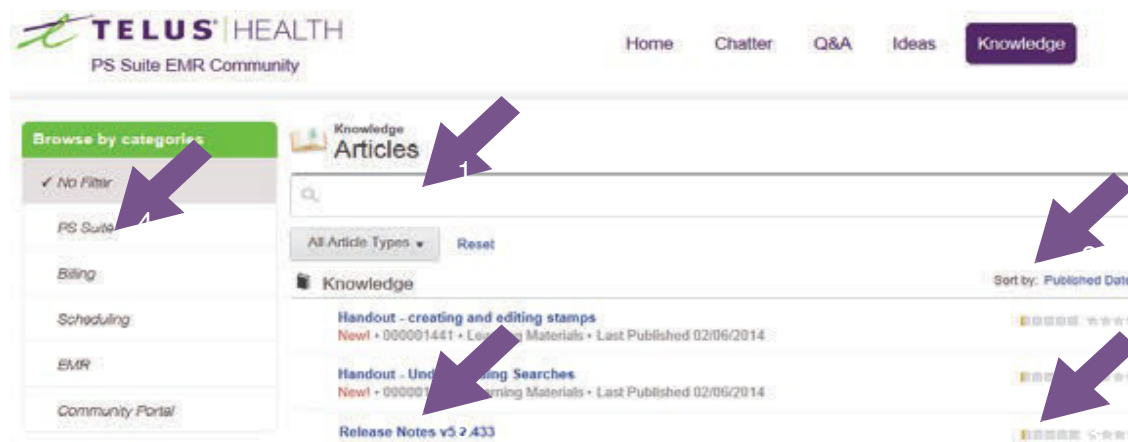
To see the last 100 people who voted on an idea, click the idea and scroll to the bottom.

Email notifications for ideas

You will always receive an email notification when someone adds a comment to an idea that you posted. You cannot turn off these notifications.

Knowledge

The Knowledge section contains content published by TELUS Health, such as product bulletins, FAQs, learning materials, release notes, system requirements, and user guides.



1. You can search the articles for specific text or search for specific types or articles. The search also looks in attachments within knowledge articles. Type your search terms and press Enter {Return}.

You can use the buttons below the search field to filter the results by category (i.e., only articles related to billing) and article type (i.e., only release notes). Click Reset to clear the filters.

2. By default, articles appear in the order that they were published. In the Sort by choice, you can change the sort order. Click a title to view the article.
3. The view score and ranking show you what is popular within the community.
4. You can choose to filter your results by category.
5. Click an article to view it.
 - If the article includes an attachment, it appears near the top. Click the attachment to open it or save it to your computer.
 - To rate the article for its quality or usefulness, select a number of stars in the upper left corner.
 - To print the article, click Printable View in the upper right corner. A printer-friendly view opens in a new window.
 - To see the publishing details of the article, click Show Properties in the upper right column.

Support

For support, contact the OACIS Community Portal manager OACIS.portail@telus.com