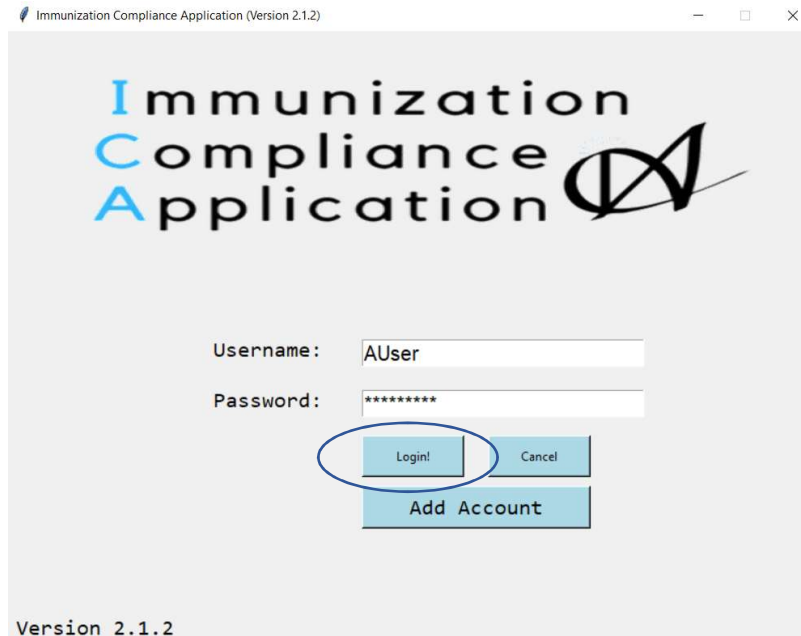


Getting Started Guide

1) Enter Username and Password



2) Main Screen Functionality

- a. File Menu
 - i. Home: Return to main screen
 - ii. Export: Export list of patients in .txt or .csv format
 - iii. Log out: Exit program
- b. Options
 - i. Hide notifications: Clear notifications screen
- c. Help
 - i. Guide: User Guide
 - ii. About Us
- d. Analytics
 - i. My Analytics: Graphical performance representation
 - ii. Group Analytics: Graphical performance representation
- e. History
 - i. My History: User system activity log
 - ii. System History: System activity log
- f. Admin

3) Basic Patient Search

Search:

☐ First Name

☐ Last Name

☐ Date of Birth

☐ MRN

☐ Gender

Default Work Queue

Search

Callout 1 points to the search criteria checkboxes. Callout 2 points to the search input field. Callout 3 points to the Search button.

4) Sorting Patient List

Queue Filters

☐ First Name

☐ Last Name

☐ Days Overdue

☐ Sex

☐ Immunization

☐ Age

Default Filter

Callout 1 points to the search criteria checkboxes. Callout 2 points to the search input fields. Callout 3 points to the Filter button.

5) Access Patient Information: Medical History, Contact Information, Detail Patient Information

Summary	Medical History	Contact
First Name: [REDACTED]	MI: None	
Last Name: [REDACTED]	Prefix:	
Date of Birth: [REDACTED]		
Age: [REDACTED]		
Sex: [REDACTED]		
Race: [REDACTED]		
Outreach	Expand Patient	

6) Outreach Patient Screen

PATIENT: Bethany Valenzuela		GENDER: Female		AGE: 53		DOB: 1967-12-16		MRN: 94829	
Demographics Service History Outreach Report Immunizations									
Home Phone		(779) 471-0960		Interpreter		Yes			
Mobile Phone		(865) 723-7271		Guarantor Name		Bethany Valenzuela			
Preferred Contact		phone call		Guarantor Relationship		Self			
Outreach Details									
Date		2020-04-27		Outreach Notes					
Method		▼							
Outcome		▼							
Attempt Number		3							
				Previous Attempts		Submit Outreach			
Email Patient									
Sending email to: Bethany Valenzuela									
					Email Options				
					Load Template 1		Load Template 2		
					Send Email!		Clear Email		