McMaster PHR User Guide

Table of Contents

1.0 General Information

1.1 System Overview

McMasterPHR is a secure and private on-line personal health record. Users have total control as to who can input information into their record and who can access this information. McMasterPHR is a web based system that requires minimal computer experience to manage and operate.

McMasterPHR was created to engage patients in their health care and bridge the gap between information held by patients and information held by health providers. McMasterPHR aims to connect patients with their health care providers in a private and secure manner.

Traditionally, healthcare professionals are the only people who have access to patients' health records. This concept will be changed with the adoption of McMasterPHR, as it enables secure sharing of health information amongst clinics, hospitals, and the patient.

McMasterPHR offers many applications that can help users better manage health including medication management, documents management, and wellness trackers. Additionally, McMasterPHR has been developed so it can integrate seamlessly with 3rd Party applications.

McMasterPHR has been created with collaborations from many institutions, including McMaster University. The institutions provide frequent updates that follow best practice guidelines. Moreover, as any Open Source project, McMasterPHR is open to enhancement contributions provided by the community.

1.2 Authorized Use Permission

McMasterPHR is an Open Source Project licensed under the GNU General Public License. Open Source software is non-proprietary, has no licensing fees and is therefore able to evolve rapidly as a result of innovative contributions from the community.

Additional benefits of an open source product include:

- More cost effective than proprietary systems
- No vendor lock-in
- Complete ownership of data
- Customizable system
- Community support and involvement
- Development and contributions from users across the nation and beyond
- Peer-reviewed, secure software

1.3 Help Desk

For additional information, the help desk can be contacted at:

- Toll free: 1-855-355-1855

1.4 User Guide Overview

The McMasterPHR user guide has been divided into 3 sections:

1.0 General information: An overview of the system and its objectives, brief introduction of the manual and how to read it effectively.

2.0 Getting Started: An outline of the system`s main functionalities and where you can find them within the PHR.

3.0 Using the System: An explanation of each feature and proper use to receive the full McMaster PHR experience.

1.5 System Configuration

The McMaster PHR is a web based service that only requires three tools:

- Computer, tablet or smartphone
- Internet connection
- Web browser (Recommended: Mozilla Firefox)

1.6 Data Flows

Within McMasterPHR, users are at the center of information control. Users hold the ability to update their profile, medication list, measurements (weight, blood pressure, etc.), and lifestyle notes. Any communication in McMasterPHR must be enabled by two way consent. Users have the ability to consent with physicians, and other members of their circle of care, to enable two-way data sharing. If enabled, physicians have access to patient health information and patients can receive medical documents from their physician.

2.0 Getting Started

2.1 Sign-In

If you have not obtained your access credentials, by mail, please contact the McMaster PHR help desk. Figure 1 is an image of the Sign-In page for the McMaster PHR. Entering your username and password directs you to the Home page of your personal health record.

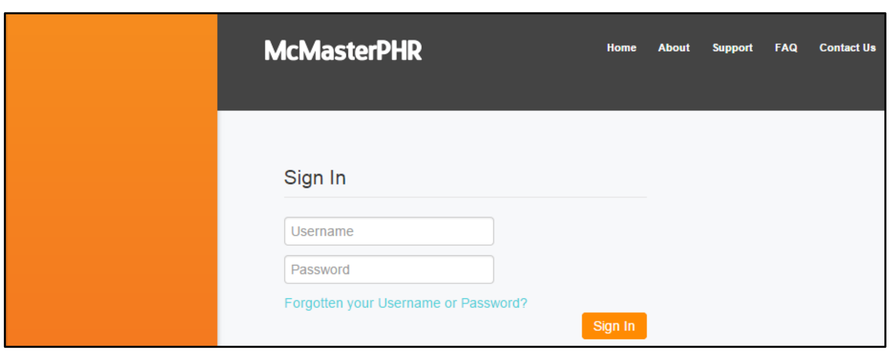


Figure 1: Sign in page for McMasterPHR

<u>**Note**</u>: Your password is stored in an encrypted format such that even the system administrator cannot find out what it is. If you have forgotten your user name and/or password, click

on the “Forgotten your Username or Password” link in the log-in page. The system will email you a new password.

2.2 System Navigation

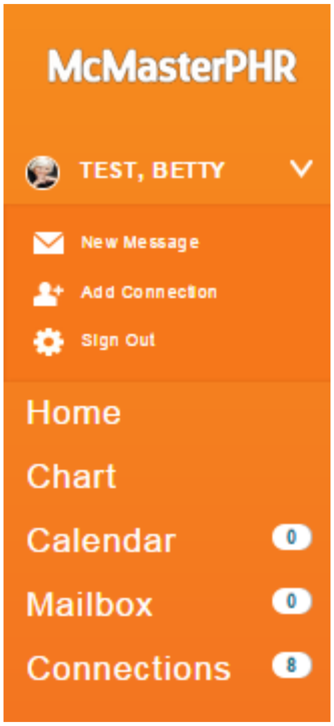


Figure 2: Primary Navigation Menu

When logging into McMasterPHR for the first time, you will be prompted to read and accept the terms of use. If the terms of use are not accepted, McMaster PHR will log you out. You are not able to access your profile until the terms of use are accepted.

After accepting the terms of use, you will be directed to your Home page. From here, you can navigate through your health record with the Primary Navigation Menu (Figure 2).

2.2.1 Primary Navigation Menu

The Primary Navigation Menu is intended for users to navigate the content of the McMasterPHR site. This menu is static, and is accessible as you scroll through a page or open different pages. By default, the primary navigation menu has the following navigation links:

- Quick Action Links
- Home
- Chart
- Calendar
- Mailbox
- Connections

The functionality of these tabs is described below in Section 3: Using the System.

2.2.2 Secondary Navigation Menu

The Secondary Navigation Menu is designed for you to navigate through the main sections of your health record. When a new section is opened, the Secondary Navigation Menu appears near the top of the screen (Figure 3A). The content of the Secondary Navigation Menu is dependent on which page of your health record that you are viewing.

1.1.1 Tertiary Navigation Menu

The Tertiary Navigation Menu appears below the Secondary Navigation Menu (Figure 3B) and has been designed for tabs with additional options. The Tertiary Navigation Menu is dependent on which tab is selected within the Secondary Navigation menu. For example, the “Medications” tab within the Secondary Navigation Menu has a Tertiary Navigation Menu with additional options.

3.0 Using the System

3.1 Primary Navigation Menu

As mentioned, the Primary Navigation Menu is the primary menu for navigating your health record. The functions associated with the Primary Navigation Menu are described below.

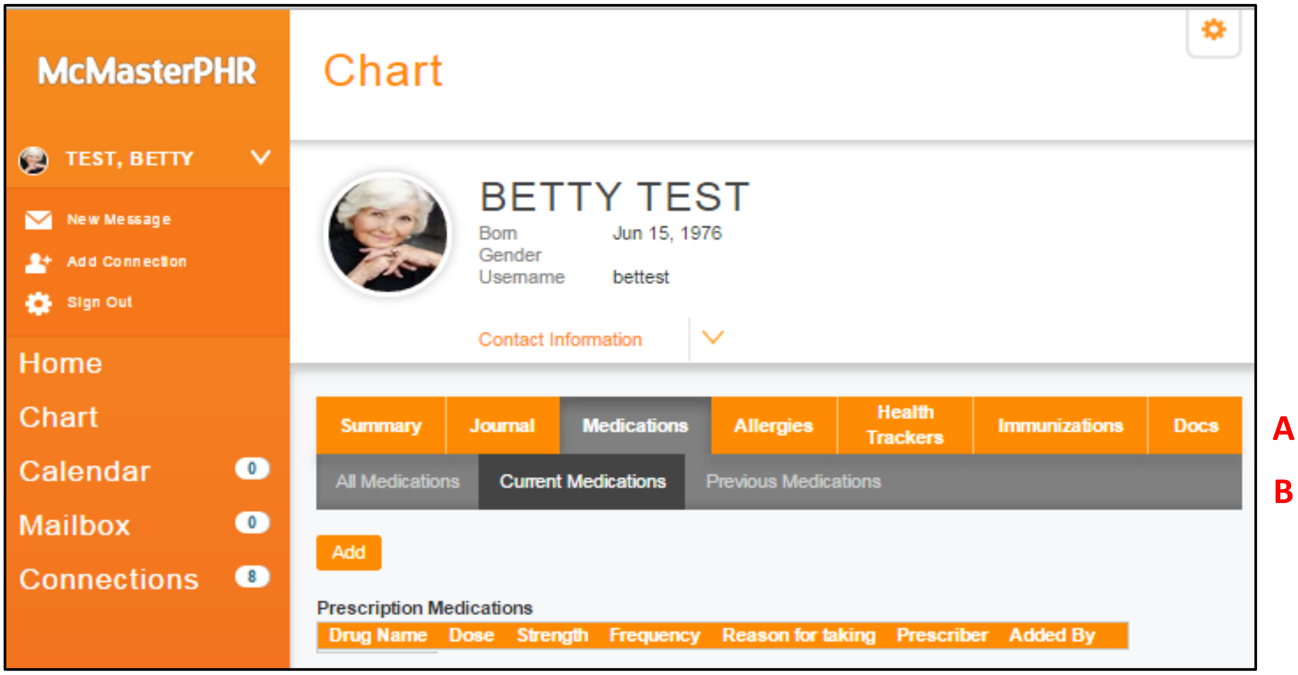
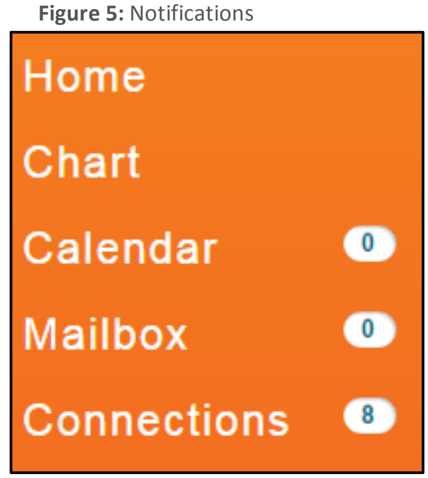


Figure 3: Secondary (A) and Tertiary (B) Navigation Menus

Figure 4: Quick Action Links

Figure 5: Notifications



3.1.1 Quick Action Links

Within the Primary Navigation Menu, there are "Quick Action Links", which represent the most common actions within McMasterPHR (Figure 4). They are located within the Primary Navigation Menu for easy accessibility.

3.1.2 Notifications

For each major section, the Primary Navigation Menu displays notifications or alerts (Figure 5). The number beside each major section represents the number of items that require your attention (new messages, new connection requests, etc.). As you address these notifications, the number should refresh to show the updated number of notifications.

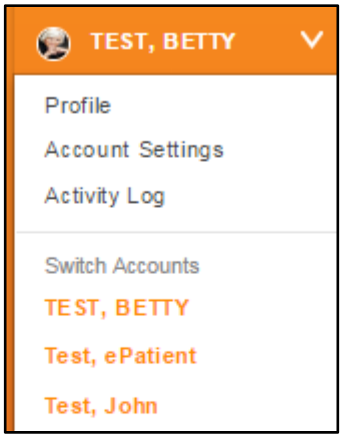


Figure 6: Profile and Account Manager

3.1.3 Profile and Account Management

The Primary Navigation Menu also allows you to edit your profile information and accounts. The Profile and Account Management menu is located below McMasterPHR logo (Figure 6). If you have access to more than one account, this menu allows you to change accounts.

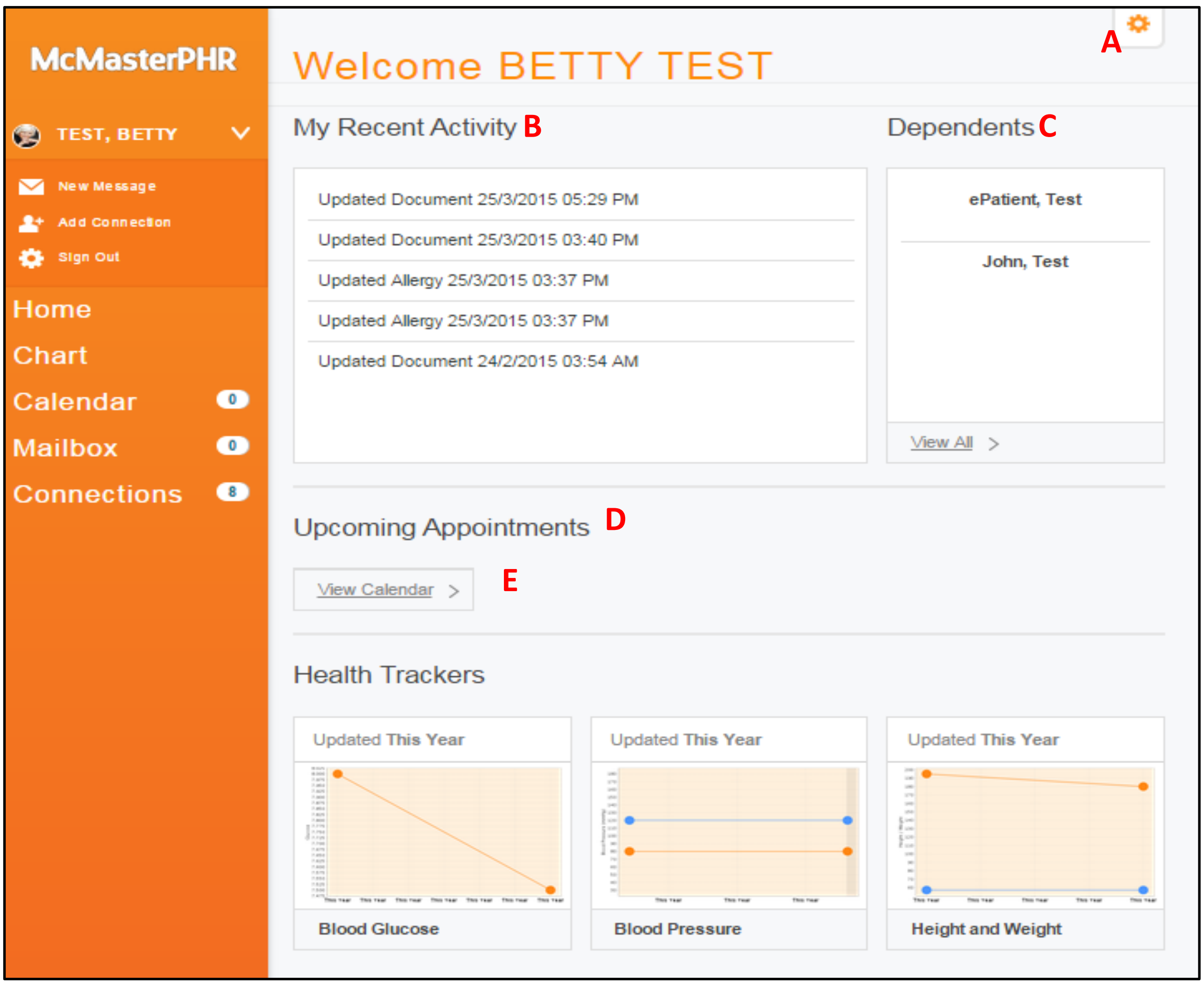
3.2 Home Page

After signing in to McMasterPHR, you are directed to your McMasterPHR Home page (Figure 7). McMasterPHR`s Home page provides you with an overview of your health record. By default, the Home page contains the following sections:

- My Recent Activity
- My Dependents
- Upcoming Appointments
- Health Trackers

The sections displayed on the Home page can be customized clicking on the settings icon in the top right corner of the screen (Figure 7A).

Figure 7: McMasterPHR Home Page



3.2.1 My Recent Activity

Your "My Recent Activity" section provides an overview of the recent changes to your account and when these changes occurred. The changes are presented as a news feed (Figure 7B).

3.2.2 My Dependents

Within the McMaster PHR, a "Dependent" is a McMasterPHR user that has given you account management access. The "My Dependents" section of the Home page lists your dependents in alphabetical order according to last name, then first name (Figure 7C). If a dependent has any new notifications (ex, new mail messages), a number is displayed next to his or her name. Clicking on a dependent's name or notification number opens their Home page in the same window. A confirmation message also appears at the top of the screen to indicate that the change has occurred.

If you have more than four dependents, a "View All" link is present at the bottom of the section. This link opens the Dependents section in the same window.

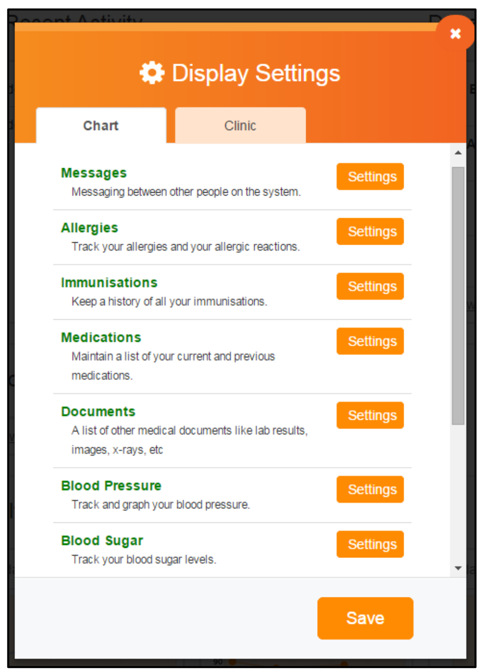
If you do not have any dependents, the "My Dependents" section is hidden and the "My Recent Activity" section spans the full width of the main content area.

3.2.3 Upcoming Appointments

Any upcoming appointments you have are displayed below the "My Recent Activity" section (Figure 7D). If an appointment is scheduled for the current date, it is highlighted. Clicking anywhere on an appointment opens a window with the details for that appointment (within the "Calendar" section).

The Home page displays up to your next four appointments. Clicking on the "View Calendar" link loads the Calendar section, which allows you to see all of your upcoming appointments.

Figure 8: Display Settings for the Chart



3.2.4 Health Trackers

In McMasterPHR, Health Trackers are health-monitoring tools that can be updated through your McMasterPHR account (additional health-monitoring apps are located in the Wellness Apps section).

The Health Trackers section of the Home page provides a visual overview of your Health Trackers (Figure 7E). If you have more than three Health Trackers, you can cycle through additional pages of Trackers using the pagination dots in the top right corner of the Health Tracker section.

If a Wellness App has partial integration with McMasterPHR (ex, if you can enter data points directly through McMaster PHR), these apps will be displayed within the Health Tracker section as well.

3.2.5 Display Settings

As mentioned, Display Settings can be adjusted by clicking the settings icon in the top right corner of the Home page (Figure 7A). The Display Settings opens as a separate window which allows you to customize the different sections of your personal health record.

The Display Settings window has two tabs: Chart and Clinic. The Chart tab allows you to adjust the settings for different sections of your health record (Figure 8). Upon clicking “Settings” for a specific section, you have the ability to disable that section from your health record. The Clinic Tab is currently a new feature under development.

3.3 Chart Screen

The Chart section contains the main components of your personal health record. Upon clicking “Chart” in the Primary Navigation Menu, the “Chart Summary” screen loads (Figure 9). This page contains an overview of the most important subsections within your Chart. The Secondary Navigation menu for your Chart has the following tabs:

- Summary
- Journal
- Medications
- Allergies
- Health Trackers
- Immunizations
- Docs

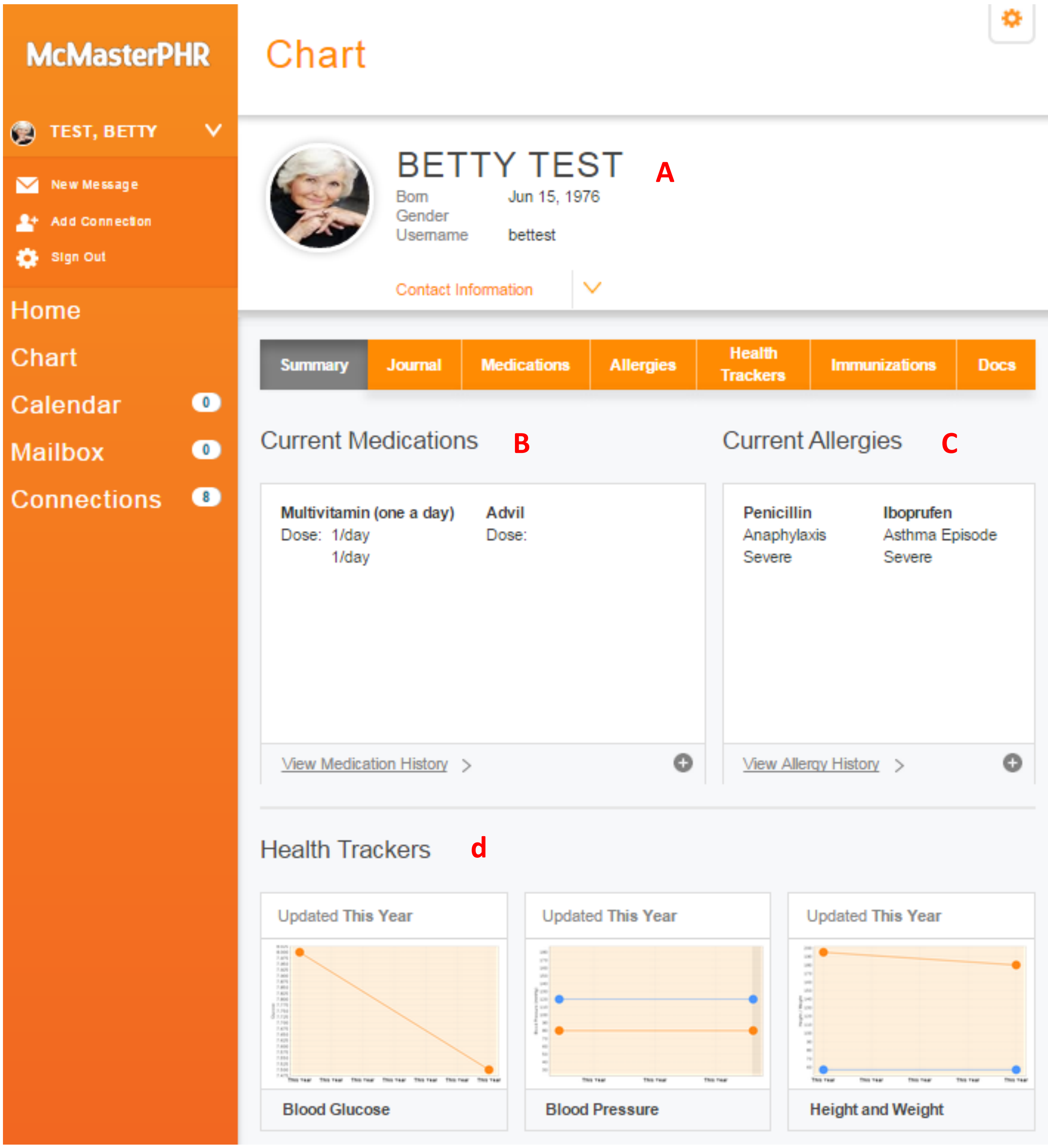


Figure 9: McMasterPHR Chart Screen

3.3.1 Patient Banner

At the top of all Chart pages is the patient banner, which displays all of your contact information. If the banner is not expanded, it shows your name, date of birth, gender and McMaster PHR username. Clicking on the "Contact Information" link below this information expands your patient banner (Figure 9A). The expanded patient banner shows your address, contact information (phone numbers and email), and your emergency contact information.

The patient banner is present regardless of what section you are in within your Chart.

3.3.2 Chart Summary

The Chart Summary is the default page that loads when you select "Chart" from the Primary Navigation menu. The Summary contains an overview of the most important subsections within your Chart:

- Current Medications
- Current Allergies
- Health Trackers

Current Medications: Displays your current medications and corresponding dose (Figure 9B). Clicking on the "Current Medication" heading or "View Medication History" link opens the Medications subsection of your Chart.

Current Allergies: Displays your allergies and their severity rating from the Allergies section of your Chart (Figure 9C). In the "Current Allergies" section, your allergies will be displayed in order of severity from top to bottom and left right. Clicking on the "Current Allergies" heading or the "View Allergy History" link opens the Allergy subsection of your Chart.

Health Trackers: The "Health Trackers" section of the Chart Summary page displays the same overview as the "Health Tracker" section in the Home page. To recap, the "Health Trackers" section provides you with a visual overview of your Health Trackers (Figure 9D). If you have more than three Health Trackers, you can cycle through additional pages of Trackers using the pagination dots in the top right corner of the Health Tracker section (not seen here).

Adding a Data Point from Chart Summary: From the Chart Summary screen, the Current Medications and Current Allergies can be edited. In the bottom right corner of these subsections, there is an "Add a Data Point" icon (Figure 10A). Clicking on this icon launches a window where the new information can be added.

Scrollbars: For Current Medications and Current Allergies, a vertical scrollbar should appear if the content exceeds the allotted space for that section (Figure 10B).

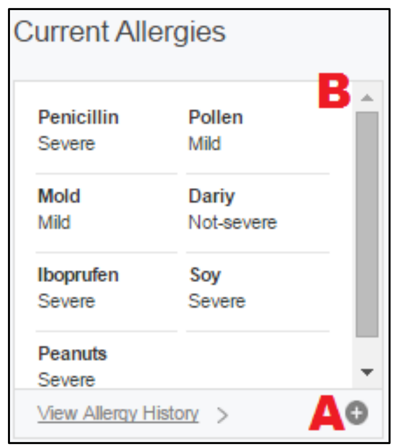


Figure 10: Current Allergies from Chart Summary

3.3.3 Journal

The Journal subsection of the Chart allows you to create different journal threads and add entries to these threads (Figure 11).

Adding/Editing a Journal Thread: To add or edit a journal thread, click on the "Manage Threads" link (Figure 11A).

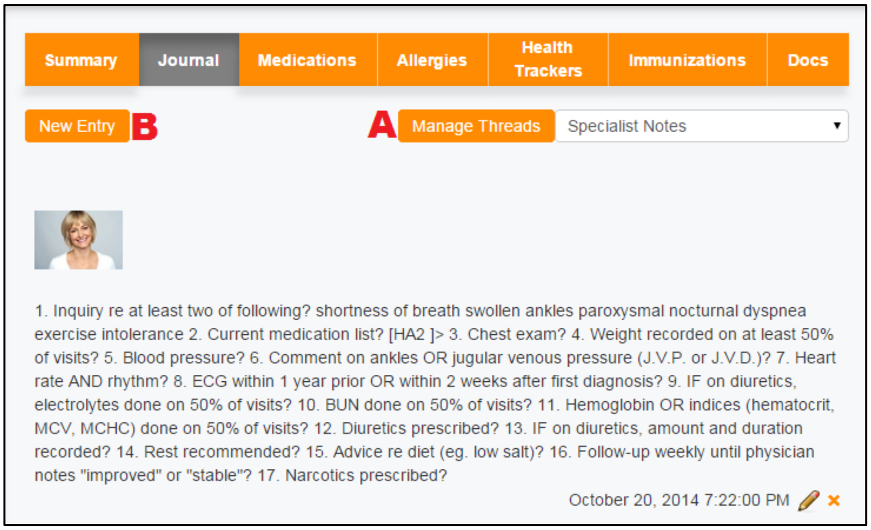


Figure 11: Journal subsection of Chart, with the demo user's "Specialist Notes" thread selected.

The page that opens will have a "New Thread" button in the upper left corner of the screen. Clicking on this will allow you to enter the name of your new thread.

Any threads that you have already added will also be visible on this page. Clicking the pencil icon in the same row as a thread allows you to change the name of the thread. Clicking on the "x" icon in the same row as a thread allows you to delete the thread.

Adding a New Entry to a Thread: To add a new entry to a journal thread, click on the "New Entry" link (Figure 11B). This opens the Add/Edit Entry window (Figure 12).

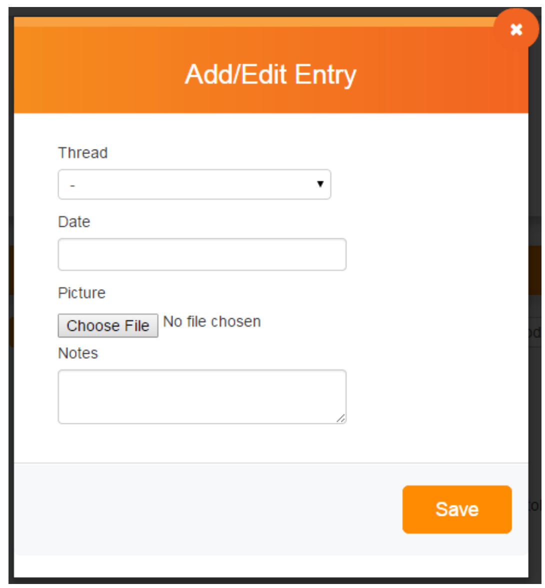
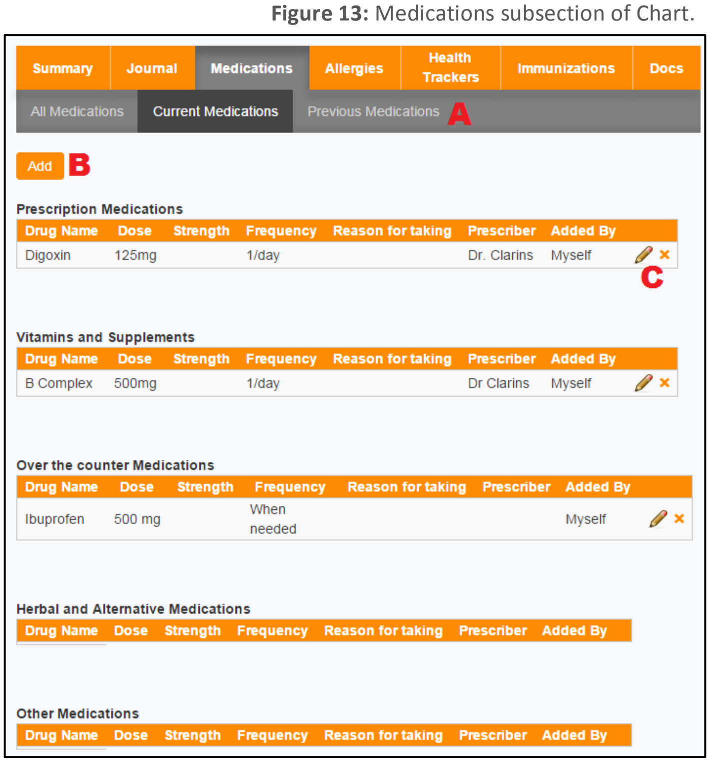


Figure 12: Add/Edit Journal Entry

The Add/Edit Entry window allows you to select the journal thread you are adding the entry to, the date, an image (optional), and add notes. After finishing your entry, click "Save".

Figure 13: Medications subsection of Chart.



3.3.4 Medications

The Medications subsection of the Chart provides you with a detailed and organized view of your medications (Figure 13). After clicking on the Medications tab of the Secondary Navigation menu, the Medications page has a Tertiary Navigation menu to view "All Medications", "Current Medications", or "Previous Medications"

(Figure 13A).

When adding a new medication, the types of medications to select from are:

- Prescription Medications
- Vitamins and Supplements
- Over the Counter Medications
- Herbal and Alternative Medications
- Other Medications

Adding a Medication: On the left side of the Medications page, below the Tertiary Navigation menu, is the "Add" button (Figure 13B). Clicking "Add" launches the Add/Edit Medications window (Figure 14). The only required fields are Medication Type and Drug Name. Upon filling out the desired fields, clicking "Save" at the bottom of the window will update your personal health record with the new medication.

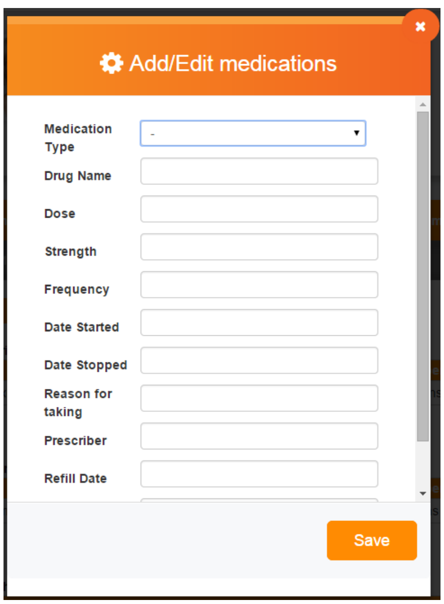


Figure 14: Add/Edit Medication

Editing a Medication: To edit a medication, click on the pencil icon located to the right of the "Added By" column (Figure 13C). This launches the Add/Edit Medications window (Figure 14). After editing the drug, the changes can be saved by clicking "Save" at the bottom of the window.

Deleting a Medication: For each medication, there is an orange "X" located next to the pencil icon (Figure 13C). Clicking on the "X" will remove that medication from your record.

3.3.5 Allergies

The Allergies subsection of the Chart provides you with detailed information regarding any allergies you may have (Figure 15). Clicking on the Allergies tab of the Secondary Navigation menu will launch the Allergies page.

Adding an Allergy: On the left side of the Allergies page, directly below the Secondary Navigation menu, is an "Add" button (Figure 15A). Clicking "Add" launches the Add/Edit Allergies window (Figure 16). Upon filling out the desired fields, clicking "Save" at the bottom of the window will update your personal health

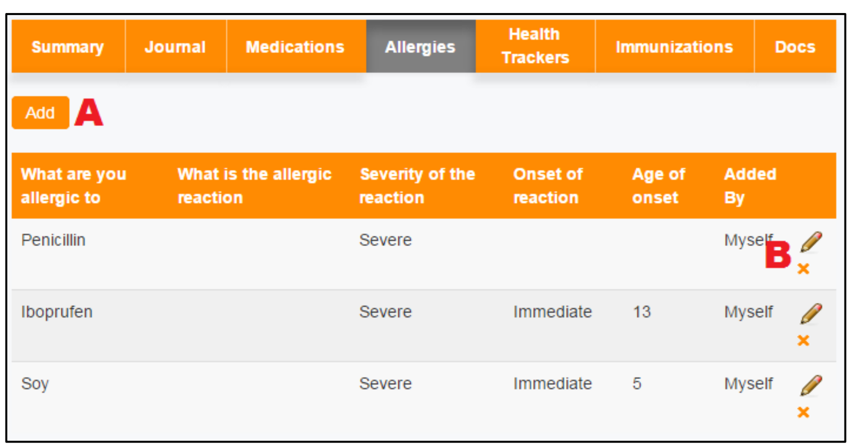


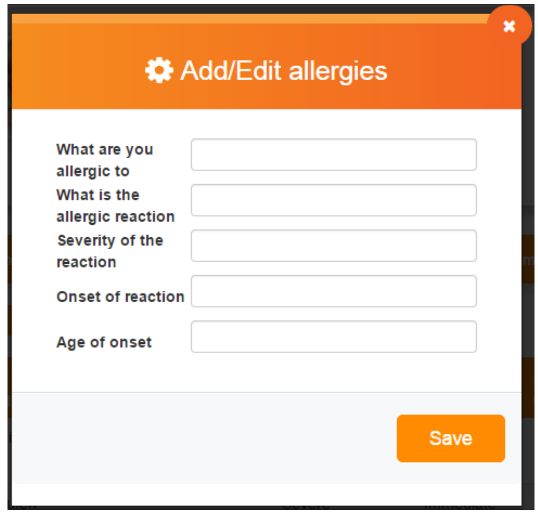
Figure 15: Allergies subsection of Chart

record with the new allergy.

<u>**Note:**</u> The only required field to add an allergy is the “What are you allergic to” field.

Editing an Allergy: To edit an allergy, you must click on the pencil icon located to the right of the “Added By” column (Figure 15B). This launches the Add/Edit Allergies window (Figure 16). After editing the allergy, the changes can be saved by clicking “Save” at the bottom of the window.

Figure 16: Add/Edit Allergies



Deleting an Allergy: For each allergy, there is an orange “X” located next to the pencil icon (Figure 15B). Clicking on the “X” will remove that allergy from your record.

3.3.6 Health Trackers

The Health Trackers subsection of the Chart allows you to add new health information or monitor your specific health measurements. For example, the Blood Pressure Health Tracker allows you to enter you blood pressure, heart rate, date of measurement, and where the measurement was taken. This information can be reviewed and charted in the Health Trackers section. Similar to the Medications subsection, clicking on the Health Trackers tab launches a Tertiary Navigation menu. The purpose of this menu is to navigate between the different Health Trackers. By default, the Blood Pressure Health Tracker opens when the Health Trackers tab is selected (Figure 17).

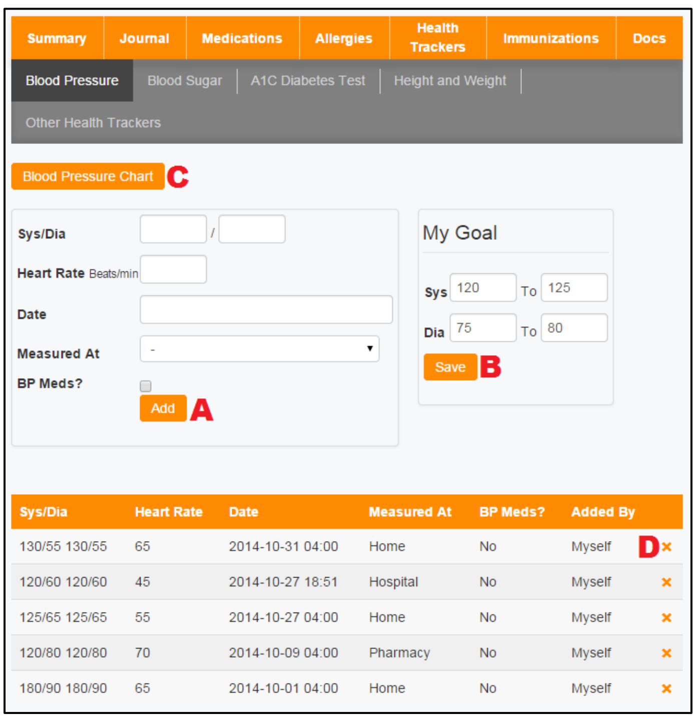


Figure 17: Blood Pressure Health Tracker

If your McMaster PHR account is integrated with your clinic’s version of OSCAR, clinic measurements for Blood Pressure, Blood Sugar, A1C Testing and Height and Weight can be synced to your personal Health Tracker. For more information regarding this integration please speak with your clinic.

3.3.6.1 Blood Pressure Health Tracker: Allows you to track your blood pressure, heart rate, date recorded, location recorded and the presence the blood pressure medications. Previous recordings of your blood pressure can be viewed at the bottom of the page.

Adding a Data Point*:* To manually add a new blood pressure recording, enter your measurements into the fields in the top left corner (Figure 17A). After entering this information, you can add it to your Health Tracker by clicking "Add".

Setting Goals*:* To the right of the data entry fields, there is a section for entering your blood pressure goals (Figure 17B). After entering the goal range for your Systolic and Diastolic, clicking "Save" will update your goals.

View Blood Pressure Chart*:* To view your blood pressure data graphically, click on the "Blood Pressure Chart" button in the top left corner of the screen (Figure 17C). This launches a chart with your blood pressure data plotted. The "From" and "To" fields allow you to adjust the beginning and end dates of the chart. After adjusting the dates, you must click the "Generate Chart" button to refresh the chart.

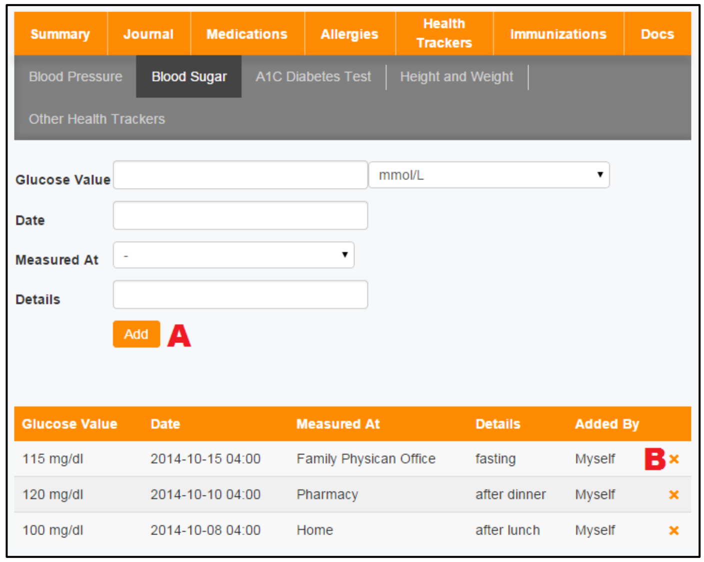


Figure 18: Blood Sugar Health Tracker

Deleting a Data Point*:* To delete a data point, click on the orange "X" in the same row as a data point (Figure 17D).

*3.3.6.2 Blood Sugar Health Tracker***:** Allows you to track your blood sugars levels as well as the date recorded, location recorded and additional details (Figure 18). Previous recordings of your blood sugar can be viewed at the bottom of the page.

Adding a Data Point: To manually add a new blood sugar recording, enter your data into the fields in the top left corner (Figure 18A). After entering this information, you can add it to your Health Tracker by clicking "Add".

Deleting a Data Point*:* To delete a data point, click on the orange "X" in the same row as a data point (Figure 18B).

*3.3.6.3 A1C Diabetes Test Health Tracker***:** Allows you to track your A1C levels as well as the date recorded, location recorded and additional details (Figure 19). Previous recordings of your A1C levels can be viewed at the bottom of the page.

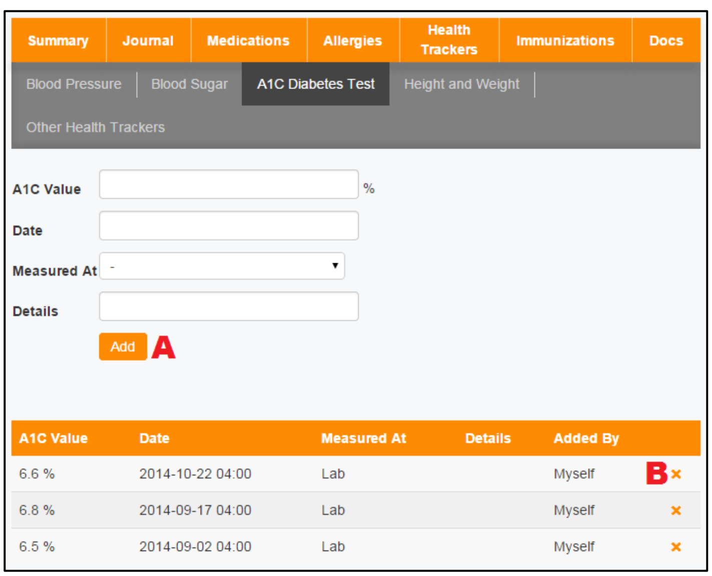


Figure 19: A1C Diabetes Test Health Tracker

Adding a Data Point: To manually add a new A1C recording, enter the data into the fields on the left side of the screen (Figure 19A). After entering this information, you can add it to your Health Tracker by clicking "Add".

Deleting a Data Point*:* To delete a data point, click on the orange "X" in the same row as a data point (Figure 19B).

3.3.6.4 Height and Weight Health Tracker**:** Allows you to track your height and weight as well as the date recorded and the location recorded.

Adding a Data Point: To manually add a new height or weight recording, enter the data into the fields in the top left corner (Figure 20A). After entering this information, you can add it to your Health Tracker by clicking "Add".

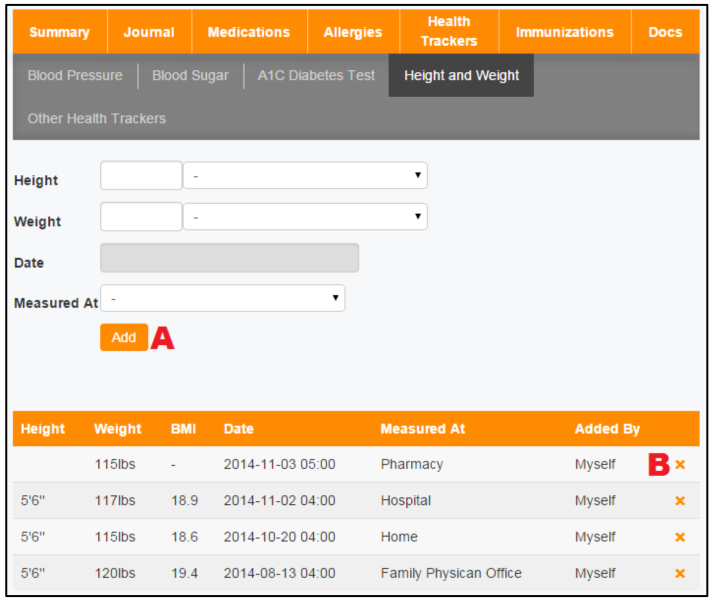


Figure 20: Height and Weight Health Tracker

Deleting a Data Point*:* To delete a data point, click on the orange "X" in the same row as a data point (Figure 20B).

3.3.6.5 Other Health Trackers**:** Allows you to create custom Health Trackers to record and track additional health information.

Creating a Custom Health Tracker*:* In the Other Health Trackers screen, click "Add a new category" (Figure 21A). This opens the Add/Edit Other Health Tracker (OHT) Category window (Figure 22). Upon entering the Name, Units and Goals, clicking Save creates a new Category with the Other Health Trackers section.

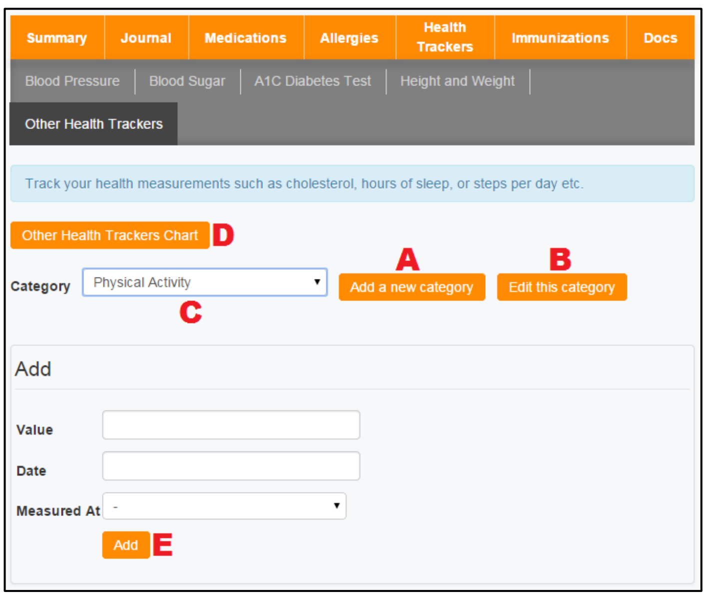


Figure 21: Other Health Trackers

Editing a Custom Health Tracker*:* In the Other Health Trackers screen, select the category that you are editing using the dropdown menu (Figure 21C). Upon selecting the category, click "Edit this category" (Figure 21B). This opens the Add/Edit OHT Category window (Figure 22). Upon editing the category, clicking Save will update the category.

Adding a Data Point*:* In the Other Health Trackers screen, select the category that you wish to add a data point to. Enter the value, date recorded, and location measured for your data point (Figure 21E). After entering these values, click "Add".

View Other Health Trackers Chart*:* To view a custom Health Tracker chart, select the category that you want to chart (Figure 21C). Next, click on the "Other Health Trackers Chart" button in the top left corner of the screen (Figure 21D). This launches a chart with your custom Health Tracker plotted. The "From" and "To" fields allow you to adjust the beginning and end dates of the chart. After adjusting the dates, you must click the "Generate Chart" button to update the chart.

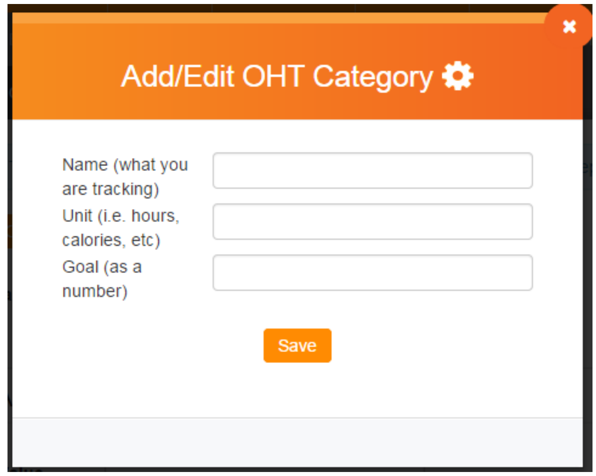


Figure 22: Add/Edit Other Health Trackers Window

3.3.7 Immunizations

The Immunizations subsection of the Chart provides you with detailed information regarding your immunizations (Figure 23). Clicking on the Immunizations tab of the Secondary Navigation menu opens the Immunizations page.

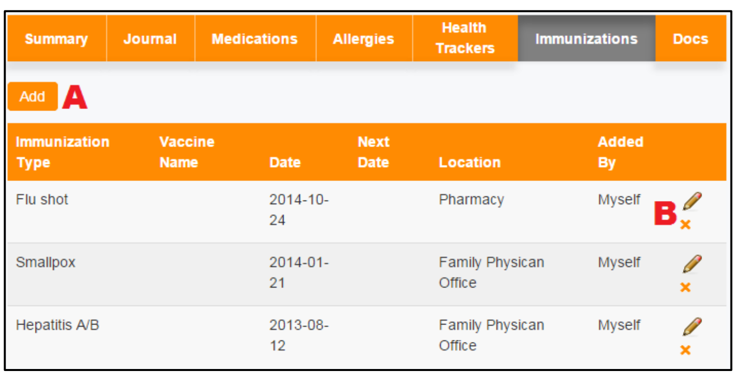


Figure 23: Immunizations subsection of Chart

Adding an Immunization: Directly below the Secondary Navigation menu, on the left side of the Immunizations page is an "Add" button (Figure 23A). Clicking "Add" launches the Add/Edit Immunizations window (Figure 24). Upon filling out the fields, clicking "Save" at the bottom of the window updates your personal health record with the new immunization.

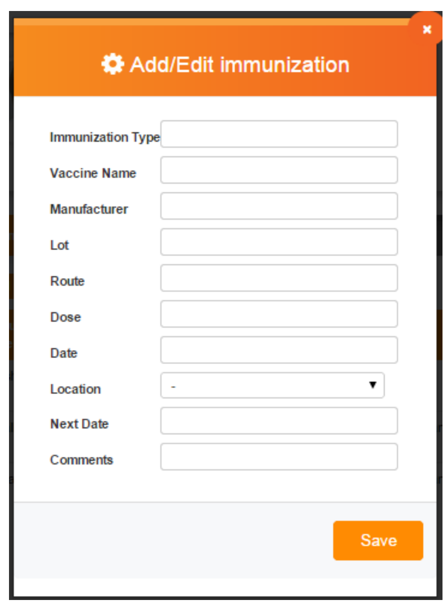


Figure 24: Add/Edit Immunizations

Editing an Immunization: To edit an immunization, you must click on the pencil icon located to the right of the "Added By" column

(Figure 23B). This launches the Add/Edit Immunizations window (Figure 24). After editing the immunization, clicking "Save" at the bottom of the window will update your immunization.

Deleting an Immunization: For each immunization, there is an orange "X" located next to the pencil icon (Figure 23B). Clicking on the "X" will remove that immunization.

3.3.8 Docs

The Docs section allows you to upload relevant documents to your personal health record (immunization records, blood tests, etc.). Clicking on the Docs tab within the Secondary Navigation menu will launch the Docs page (Figure 25).

Adding a Doc: Below the Secondary Navigation menu, on the left side of the Docs page, there is a "Choose File" button (Figure 25A). Clicking on this button launches a window, where you can select a file to upload from your computer. After selecting your file, click "Open" in the bottom right corner of this window.

Next to the "Choose File" button, you should see your file name. If this is the correct file, you can give it a new name in the "Description" text box. After this, clicking on the "Upload" button directly below the "Choose File" button will upload your document to your personal health record.

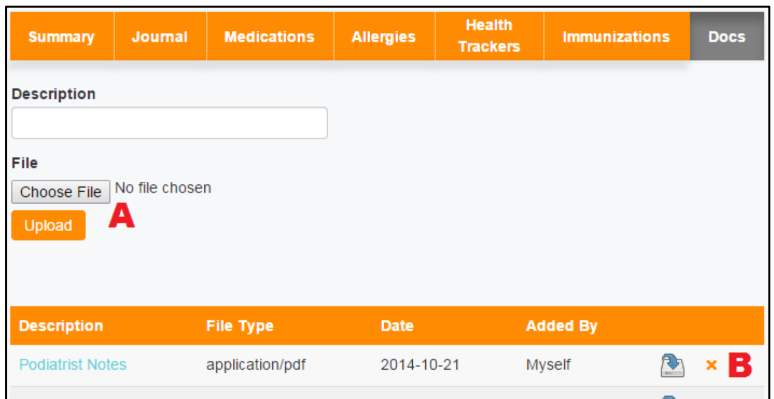


Figure 25: Docs subsection of Chart

Downloading a Doc: To download a document from your personal health record, you must select the hard drive icon located to the right of the "Added By" column (Figure 25B). Clicking on this icon should automatically begin downloading of the document.

Deleting a Doc: For each document, there is a orange "X" located next to the hard drive icon (Figure 25B). Clicking on the "X" will remove that document from your personal health record.

3.4 Connections Screen

Within McMasterPHR, you can connect with other users through the "Connections" section (Figure 26). The Connection Screen can be accessed by clicking on "Connections" from the Primary Navigation menu.

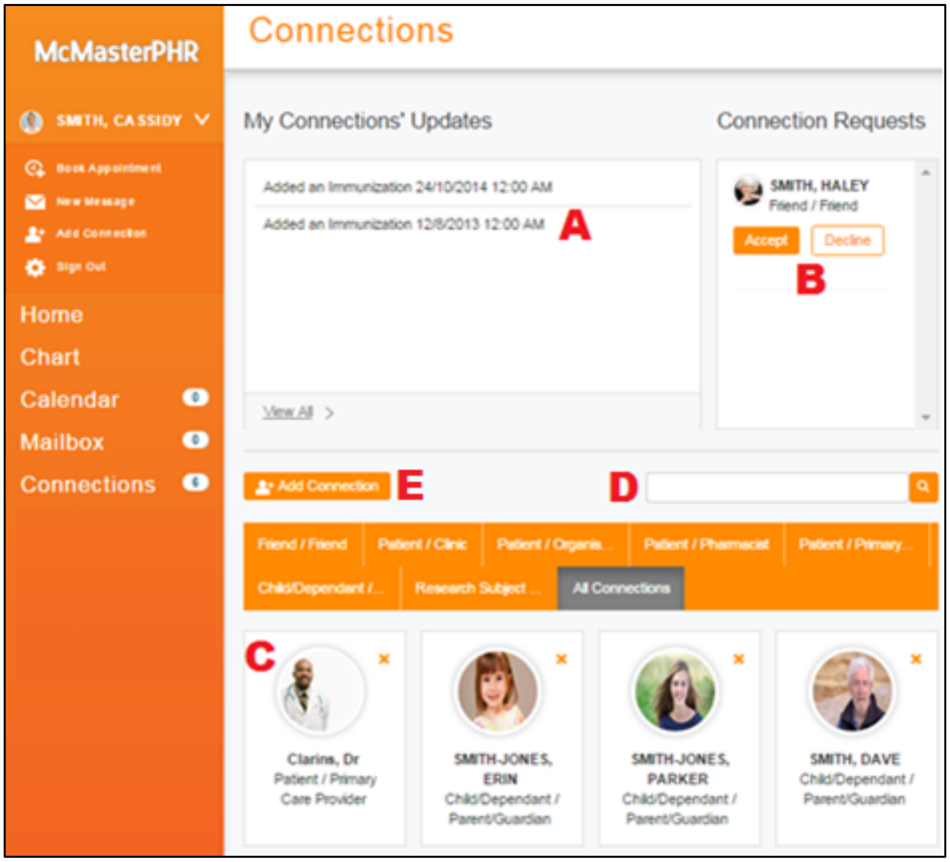


Figure 26: McMasterPHR Connections Screen

3.4.1 Connection Updates

The Connections section displays your connection's recent updates through the Connections' Updates newsfeed (Figure 26A).

Within the Connections Updates, clicking on a connection's name loads their Chart page in your current window. Clicking on any other bolded text (medication, allergy, etc.) loads that specific page within your connection's chart.

3.4.2 Connection Requests

To the right of the Connections Updates is the Connection Requests section, where connection requests made by other users are displayed (Figure 26B). Under each request are options to "Accept" or "Decline" the request. Clicking "Decline" will open a modal confirming that you are declining the connection request.

Clicking "Accept" launches the Connection Request window (see section 3.4.6 for more information on accepting connections).

If you have more than two connection requests, you can scroll through them using the scrollbar on the left side of the Connection Request section.

3.4.3 Connections

Your connections are displayed in the lower half of the Connections screen (Figure 26C). Your connections can be filtered through the Secondary Navigation Menu (directly above your connections) based on connection relationships. If a connection is pending acceptance, it still appears in your connections list.

Clicking on any connection will load their Chart in the same window.

3.4.4 Search Connections

You can search for a current connection by using the "Search Connections" field. The search bar is located directly under the Connection Requests section in the Connections page (Figure 26D).

Note: The search bar cannot be used to search for individuals that you are not connected with.

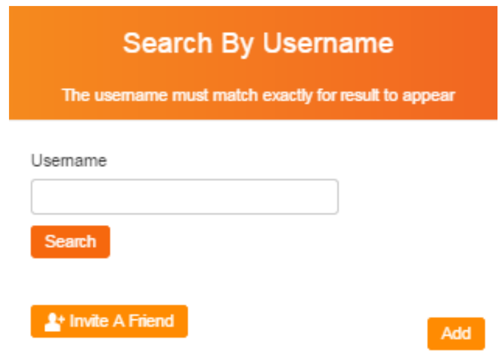


Figure 27: Add Connection window

3.4.5 Adding a Connection

There are two ways to access the Add Connection window:

- From any page in McMasterPHR, you can click on the "Add Connection" link on the Primary Navigation Menu (see Figure 2).
- From the Connections page, you can click on the "Add Connection" button directly under the Connections Updates section (Figure 26E).

The Add Connection window prompts you to search for a connection according to username. Upon clicking the "Search" button, your search results appear below directly underneath. Clicking "Add" opens up a secondary Connection Request window (Figure 28), where you can select the connection type (Friend & Friend, Patient & Clinic, etc.) and the access permissions (Chart Access or Full Account Management access) can be specified before sending the request. The access permissions you select for your new connection dictates the final step of adding a connection.

Note: When adding a connection, the access permissions you set are the permissions you grant your connection over your account.

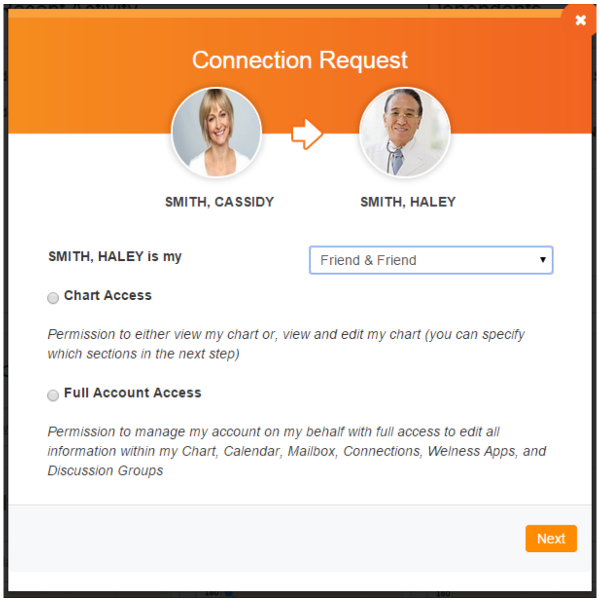


Figure 28: Secondary Connection Request window

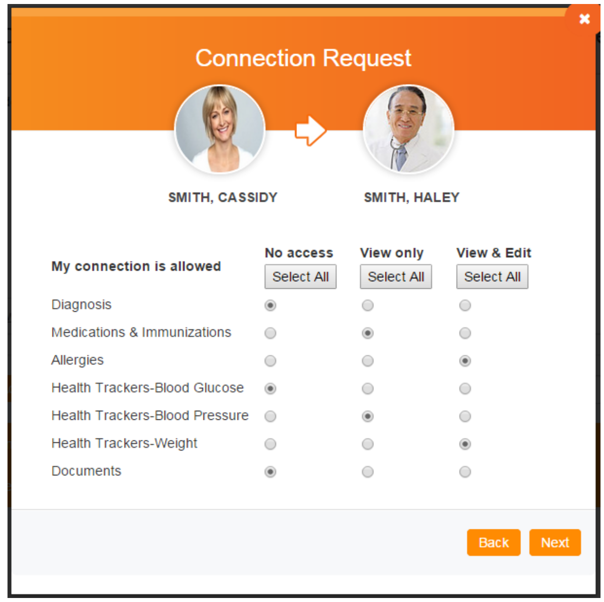


Figure 29: Chart Access Permissions window

- **Selecting Chart Access:** Opens another window, where you can specify the exact access permissions for your connection (Figure 29). For each section of your Chart, you can give your new connection no access, view only or view and edit permissions. Clicking "Next" brings you to a confirmation window.
- **Selecting Full Account Access:** Opens another window confirming what you have agreed to (Figure 30).

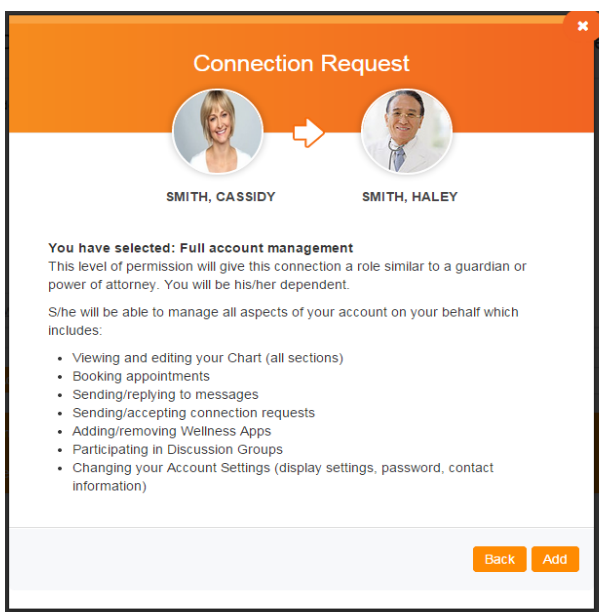


Figure 30: Full Account Access Permissions window

Upon setting your connection's access permissions, clicking "Add" sends a connection request to that individual.

3.4.6 Inviting a Connection

If the individual with whom you are trying to connect does not have their own PHR account, you can invite them using an email address.

- Click on "invite a friend" (as shown in Figure 27)
- Enter in the individual's NAME
- Enter in the individual's EMAIL ADDRESS
- Select a RELATIONSHIP

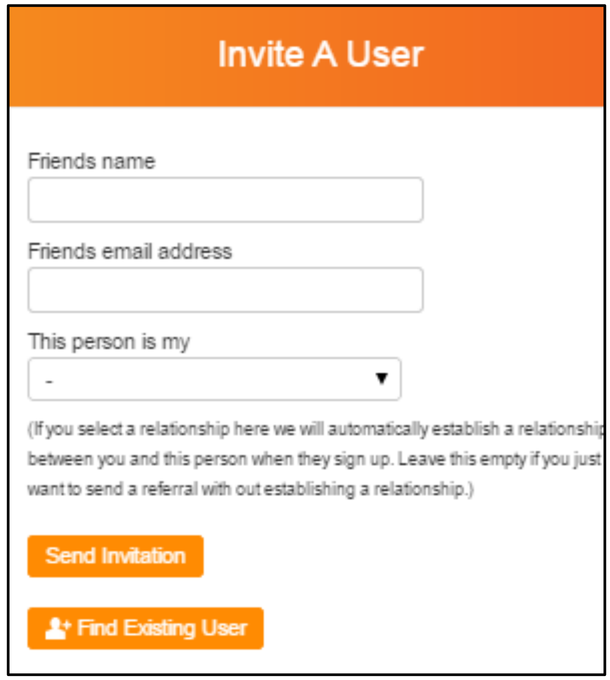


Figure 31: Inviting a Friend

3.4.7 Accepting a Connection

The process for sending a request is very similar to adding a connection. Pending connection requests can be accessed through the Connections page (Figure 26B).

Clicking "Accept" launches the same Secondary Connection request window as when you are adding a connection (Figure 28). The remaining steps are the same as adding a connection (see Section 3.4.5).

Clicking "Decline" permanently removes that connection request.

3.5 Mailbox

3.5.1 Mailbox Overview

The mailbox offers you the features of a basic mail system, including:

- Sending messages
- Forwarding messages
- Replying to messages
- Attaching files to messages
- Saving files from messages
- Marking messages as unread

The Secondary Navigation menu within the Mailbox section allows you to navigate between your Inbox, Sent and Archived messages (Figure 32A). Each section allows up to 30 messages to be displayed on a page. If there are more than 30 messages in your inbox, the page arrow (Figure 32B) is active. This allows you to navigate between pages of messages.

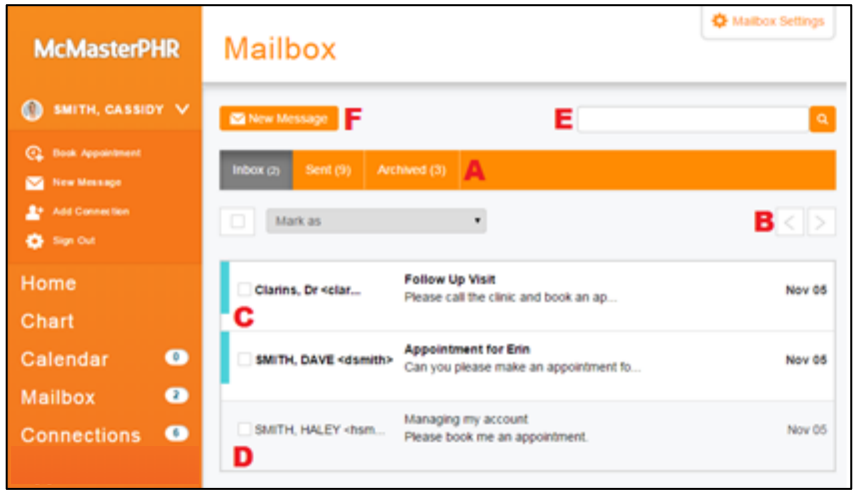


Figure 32: McMasterPHR Mailbox Screen

Unread messages are displayed with bolded text and a blue vertical border on the left (Figure 32C). Upon opening messages, the subject titles are no longer bolded and the vertical border disappears (Figure 32D).

The search bar at the top of the page (Figure 32E) allows you to search through the contents of your mailbox.

3.5.2 Sending a New Message

To send a new message, you can either click on the "New Message" link from the Quick Action Links within the Primary Navigation menu (see Figure 4) or the "New Message" link above the Secondary Navigation menu within the Mailbox (Figure 32F). Both of these links open the New Message screen (Figure 33).

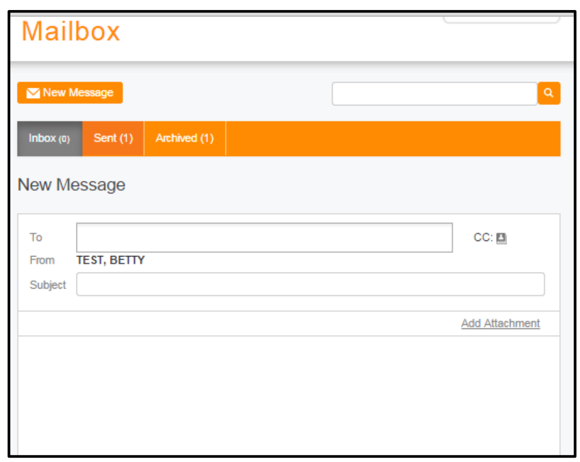


Figure 33: New Message Screen

When entering the recipient(s) for a new message, you can type in the first few letters of the connection's first name, last name or user name. Entering any of these prompts a list of suggested connections in a dropdown menu. Selecting the desired connection populates the "To" field accordingly.

The "From" field is automatically populated with your name. If you are sending a message on behalf of a dependent, you can select the checkbox below the "From" row. When a message is sent on behalf of a dependent, the message also appears in your dependent's Mailbox as an unread message.

Clicking on the "Add Attachment" link opens a window, where you can select a file from your computer. After selecting the appropriate file, clicking "Open" in the bottom right corner will close this window and add the attachment to your message. At this time, documents from your Chart cannot be attached to messages.

After you have written your message, clicking the "Send" button will send the message to the contacts you added in the "To" field.

3.5.3 Reading Messages

To open and read a message, click anywhere in the message row (Figure 31C). This opens the message in the same window.

If the message has any attachments, they can be downloaded by clicking on the file name within the message. This prompts the system to automatically download the file to your computer.

3.5.4 Replying to a Message

After reading a message, if you choose to reply to the sender, click the Reply icon just below the Secondary Navigation menu. If the message was sent to other people as well, selecting the Reply All icon allows you to reply to everyone within the message. After clicking Reply or Reply All, the message reply follows the same format as a new message (see above section).

3.5.5 Mailbox Settings

Mailbox Settings can be accessed by clicking on the "Mailbox Settings" link in the top right corner of the screen above the Secondary Navigation menu. This will open a window where you can configure the following Mailbox Settings (Figure 34).

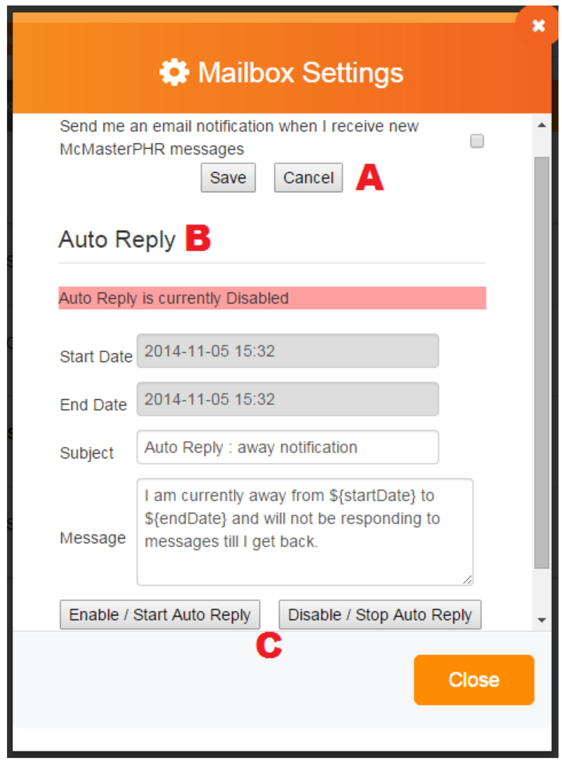


Figure 34: Mailbox Settings Window

Email Notifications: If you would like to receive an email notification when you receive a new McMasterPHR message, select the checkbox to the right of the message (Figure 34A). You must click the "Save" button to enable your selection.

Auto Reply: If you will not access to your McMasterPHR account, you can create an auto reply message (Figure 34B). This message is sent to anybody that sends you a message while you are away. To configure this, enter the Start Date, End Date, Subject and Message (a default Subject and Message should already exist). To enable the auto reply, click the "Enable/Start Auto Reply" button. To disable the auto reply, click the "Disable/Stop Auto Reply" button (Figure 33C).

When you have finished configuring your Mailbox Settings, click the "Close" button on the bottom of the window.

3.6 Calendar

3.6.1 Calendar Overview

The McMasterPHR Calendar allows you to keep track of all your health related appointments/tasks (Figure 35). Due to differences between users, the calendar can be viewed as a monthly, weekly and daily schedule (Figure 35A). In the month and week view, the current day is highlighted in blue.

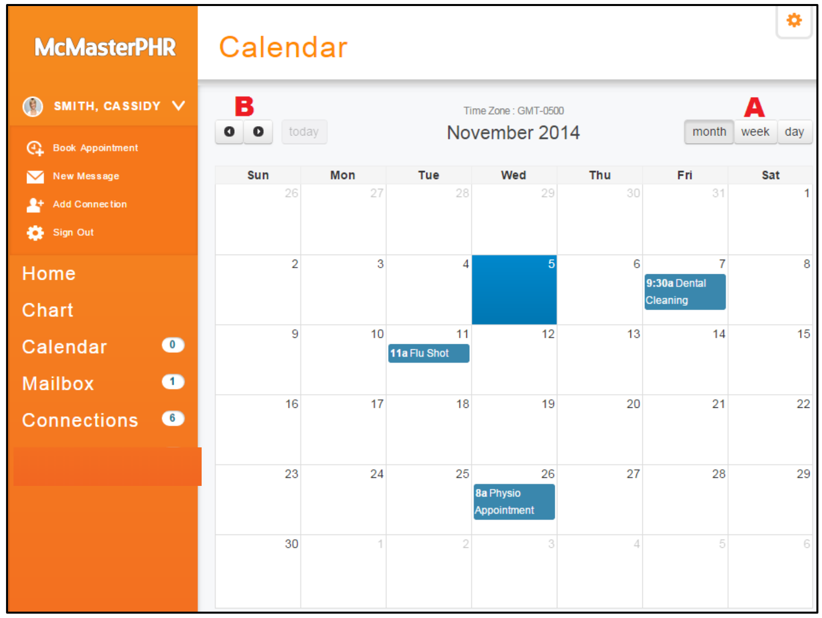


Figure 35: McMasterPHR Calendar Screen

The arrows in the top left corner of the screen allow you to toggle between months/weeks/days depending on your view (Figure 35B). If the current day is not viewable within your calendar (ex, viewing your December schedule in November), clicking on the "today" button brings the current day into view.

3.6.2 Adding a Task

To add a task to a specific day/time, double click on the day (in month view) or time of the day (in week/day view). This opens a Task Details window (Figure 36).

Enter the description of the task under the Notes section (ex, Flu Shot) as well as the start and end times. After filling in these fields, clicking on the "Save" button enters the task into your calendar.

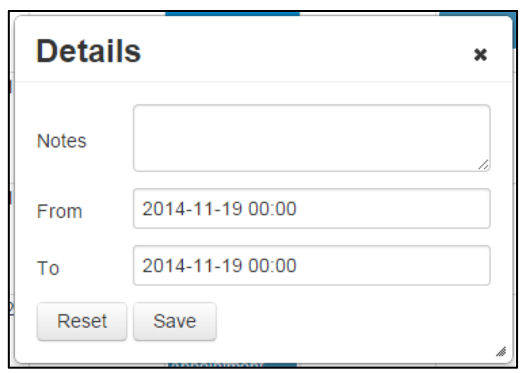


Figure 36: Task Details Window

3.7 Managing a Dependent's Accounts

The following outlines how to add a user as a dependent and the unique features that you may notice when managing a dependent's account.

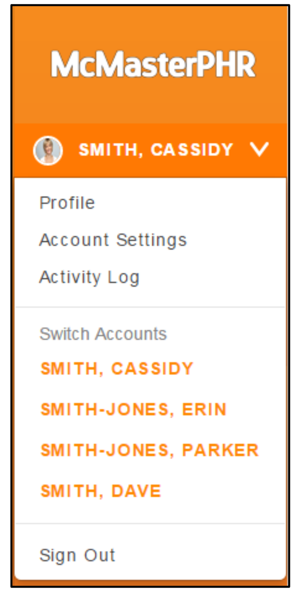


Figure 37: Primary Navigation Menu Dropdown

Note: There are no significant to the features within the Connections and Chart sections when managing a dependent's account.

3.7.1 Adding a Dependent

Adding someone as a dependent should occur while adding them as a connection (see Section 3.4.5). While configuring the connection your dependent must select "Full Account Management" as the access permission (see Figure 28).

At this time, it is not possible to make an existing connection a dependent. You must first remove the individual from your connections list and re-add them to change your access permissions.

3.7.2 Accessing a Dependent's Account

After adding an individual as a dependent, their account can be accessed through the Primary Navigation Menu. Clicking on the arrow next to your name in the Primary Navigation Menu will launch a drop down menu that displays your dependents (Figure 37).

3.7.3 Dependent's Home Page

A dependent's Home page has only a few differences from your own Home page. In the top left corner of the screen, the text "[your name] managing [dependent's name]" is displayed (Figure 38A). Additionally, a banner appears along the top of the screen (Figure 38B), which serves as a visual cue. Finally, any changes made by a guardian to a dependent's chart are appended by the text "by [your name]" in the My Recent Activity section.To switch back to your own account, click on the "Go back to managing your account" link on the banner or click on your own name in the drop down menu in the Primary Navigation Menu (Figure 37).

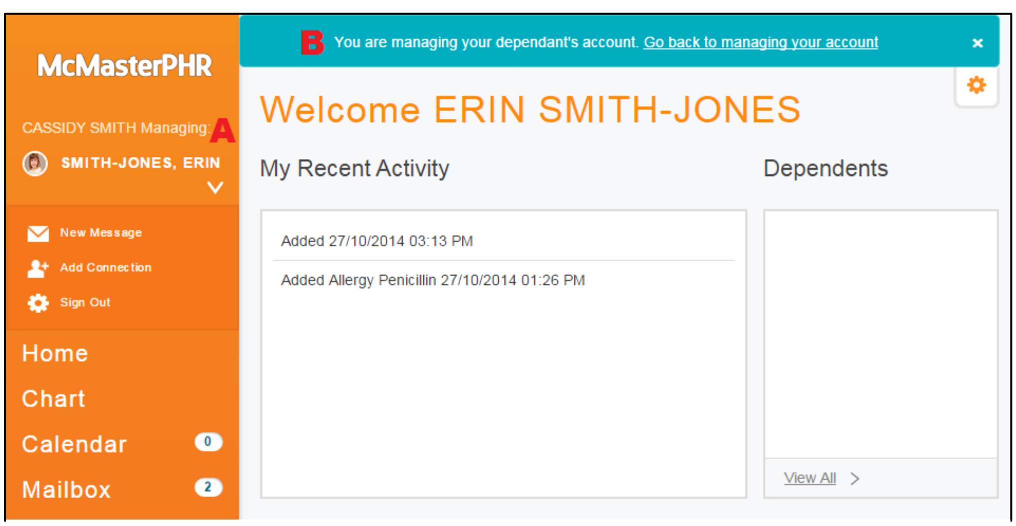


Figure 38: Dependent's Home Page

3.7.4 Dependent's Mailbox Page

Sending a message on a dependent's behalf follows the same process as sending a message with your own account, except that the From field is prepopulated with the guardians name, and there is an option to send a message on behalf of your dependent (Figure 39).

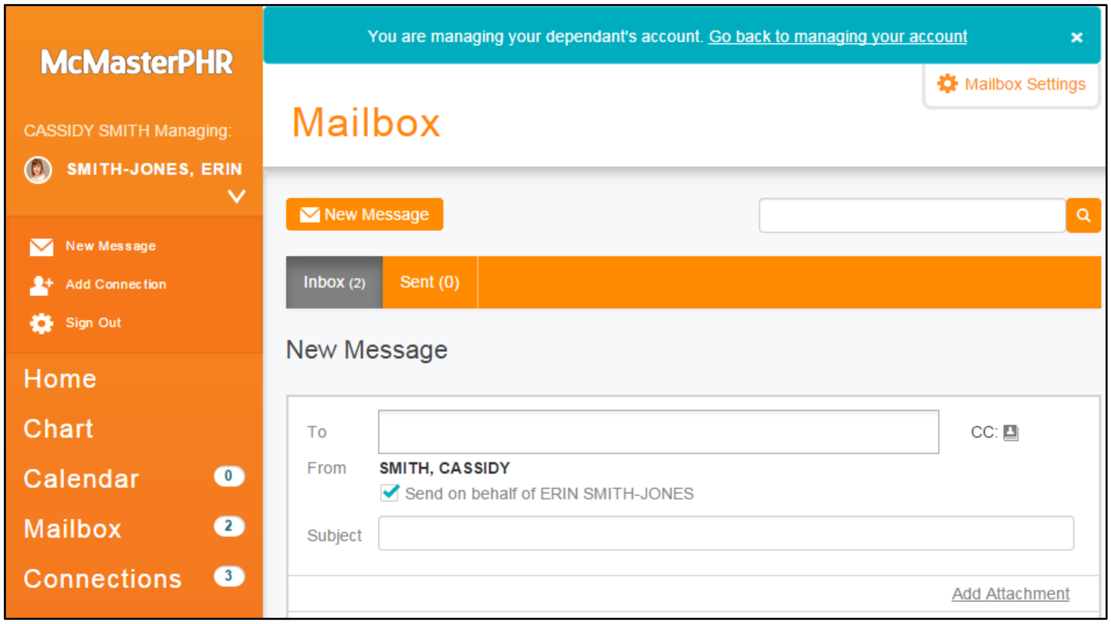


Figure 39: Dependent's Mailbox Screen