



Handbook

1 This handbook is intended to assist all Remport users with successfully setting up their accounts. It contains step-by-step instructions that are easy to follow.

Canadian Homeopathy Wellness Group is a company focused on representing the miasmatic systems of treatment through various solutions catered to its users, practitioners and organizations around the globe.

Remport is a clinic-management platform that comprises of both a back-end system aiding practitioners in their day to day clinic activities and a front-end system that promotes various interactivities with users through exclusive directory services.

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Clinic Information Submission

Once you've created your practitioner account, you'll be forwarded to the registration process where you will be prompted to submit information regarding your clinic. The information you submit in this form will directly connect to your profile that will display in the directory.

A few important notes regarding the registration process:

- i* Make sure the registration number submitted is in good standing with the regulatory board in your region.
- i* To display any certifications and other designations on your profile, you must attach corresponding documents that provide necessary proof.
- i* A **Caption** could be a pitch, a summary, or anything that describes your clinic/business to potential patients or clients.

Zoom Account Integration

Connecting your zoom account will allow you to conduct your services virtually through Remport. Connecting your zoom account is located on your **Dashboard** tab. Attach your email where prompted and follow the steps to connect your account via email.

Once the connection is complete, you are now able to conduct services virtually.

Link Payment Accounts

With Remport you can receive payments for your services rendered directly into your personal/business accounts. A customer booking your service may opt to pay-later, or pay at the time they book your service(s).

 Remport supports payment linking to both **Paypal** and **Stripe**.

You can link your accounts in the **Link Accounts** tab. Follow the prompts and confirmation process for each payment system. Any payments from customers will show in the **Finance** tab.

Practitioner Avatar

Your **Practitioner Avatar** is an important element to your profile as it will become your primary visual throughout the directory platform. This avatar, also known as an image, can include a logo or a personal photo, among others.

To upload your **Practitioner Avatar**, access the **Profile Management** page by clicking on your name on the top right corner and selecting **Profile**. Here you can change both your Practitioner Avatar and your Personal Avatar.

 Note that your Personal Avatar is not a part of Remport and will not show on the clinic profile or the directory.


Uploading Photos

You can showcase various photos and images in your **Photos** section within your Profile. Visualizations are important for both customers and your profile visitors.

Images you can upload include but are not limited to;

-  Photos of your clinic
-  Photos of you
-  Photos of certifications
-  Images that represent your clinic

We are constantly working to enhance the flexibility within Remport to capture the unique features of your clinic. We encourage practitioners to get creative with their visuals. *See page 9 on how to create engaging visual materials for your Profile.

-  Using images that aren't yours or aren't copy-right free can result in copyright infringement. In the event that you infringe on copyrighted material, you will have to remove said material. Canadian Homeopathy Wellness Group is not responsible for any copyright infringement.

Creating Your Services

Creating your services is a crucial element to running a successful clinic on Remport. Services can include consultations, appointments, sessions, etc.

To create a service, access the **Services** tab and select *Create My New Service*. From there you will be prompted to input the following:

- | | | | |
|---|--|--|--|
| 1 Title of Service
What the service is called. | 2 Service Duration
The duration length of the service. | 3 Price Rate (CAD)
What the price of the service is. | 4 Service Thumbnail
The avatar image of the service. |
| 5 Service Handle via
Are you conducting this service in-person, virtually, or both? | 6 Service Theme
Themes are customizable additions to the look of your booking system and can be changed per service. | 7 Form Attachments to Service
Enable or Disable? | |

 You may create up to 7 services for your Profile.

Uploading In-Take Forms

Depending on the service, you may want to include in-take forms for your patients to fill-out. Remport enables you to connect up to 4 forms per service. Patients will be able to download the forms during the booking process.

To upload a form to a service, simply access that service you want to upload a form to through the **Services** tab. Once you have entered the specific service, you will have 4 slots to upload forms to. Include a title to your form and upload its contents from your computer.

Uploading Your Resources



Remport allows you to upload important resources that are associated with your clinic. Resources such as educational material and publications can provide your patients with further insights, whereas resources such as service descriptions or how-to-docs may provide further clarity.

You can upload a resource in the **Resources** tab. Once you've selected *Add a Resource (+)* you will be prompted to title the resource, upload an avatar for the resource and either construct the resource with the given text tools or upload a PDF version of your resource.

Setting Your Schedule


Setting your schedule is crucial to getting your clinic up and running successfully on Remport as it will enable your patients to begin booking your services.

To begin setting your schedule, access the **My Schedule** tab. There you can select your schedule for each day (Monday-Sunday).

 For example, If you want to set your Monday schedule, select the  action on the Monday row and then select *All Mondays*.

Shift Breaks



If you want to include a break in your shift you must create *two* time slots. Your break is now the duration between the slots.

 For example, if your Monday schedule contains a (10:00 -14:00) time slot and a (16:00 -19:00) time slot then you would have a break from 14:00-16:00 on Monday.

Settings Specific Days

You can set certain days on your calendar to have a specific schedule.

This can be helpful when you know a certain day during the month or year will yield a different schedule for you. You may have a busier season and would like to set different schedules for that season, or you may have certain family plans where you need more flexibility during those days.

-  If you want to set a specific Monday, select the  action on the Monday row and select *Specific Monday*. You can now select the specific date and time slots for that Monday.

Holidays & Vacations

You can set a holiday or vacation time for yourself by selecting the *Update My Holiday Schedule* in the top right corner when in **My Schedule**.

Appointments

Your appointments can be accessed through the **Appointments** tab. There you will see every appointment including the date and time the appointment is set to, as well as the patient and the service associated with the appointment

Appointment Status

Appointments will have status markers depending on the status of the appointment. The status markers include *Active*, *Completed*, and *Cancelled*.

An *Active* status means the appointment is active and is awaiting completion. A *Completed* status means the appointment has been marked as complete. A *Cancelled* status means the appointment was cancelled.

-  Cancelled appointments will still be displayed in the **Appointments** tab.

Marking Appointments as Complete

When an *Active* appointment is complete, you must manually mark that appointment as *Completed* to change its status.

Cancelling Appointments

To cancel an appointment, access the **Appointments** page and select the *Choose Status* option on the appointment you want to cancel. From the *Choose Status* option you can then select *Cancelled*.

You will then be prompted to provide a reason of cancellation which will be emailed directly to the patient's inbox. The appointment will then be changed to the *Cancelled* status, and that time slot will re-open for booking.

Starting a Virtual Appointment

To begin a virtual appointment, access the **Appointments** tab and select *Start Meeting* on the appointment you want to begin virtually. Then follow the provided steps to begin the virtual appointment.

Booking Manual Appointments

With Remport you can manually book appointments for patients. This is helpful when the patient for whatever reason isn't able to access the platform.

To book a manual appointment access the **Services** tab and select the service you want to book the appointment with. When in the service page, select *Add a Manual Appointment*. There, you can select the date and time of the appointment and attach either an existing patient or a custom patient to the appointment.

Finance

Remport allows you to track your earnings through the **Finance** tab.

Indication of Payment Methods

Patients are given the ability to Pay-Later when booking through the platform. This simply means that the patient does not have to pay for a service via the platform.

If a patient booking your service select the pay-later option, they are prompted with different payment methods to choose from. This does not bind the patient to pay with the chosen payment method at the time of booking but rather acts as an indication, so that when you do discuss payment with the patient you may be better prepared to accommodate them.

If a patient does choose to pay-later, you can refer to the **Finance** tab to find out what their preferred payment method is.

Editing Profile Information

At any point you want to edit your information, select the **Settings** tab.

Editing Information Subject to Validation

If you are editing any information that needs to be validated by Remport (registration numbers, certifications, etc.) please allow 24 to 48 hours for the edited information to be displayed.

Badges & Accolades

Remport includes a Badges & Accolades initiative to maintain and promote personalization on the platform. **Accolades** are achieved by usage of the platform and **Badges** are provided to practitioners as occupational/skill indicators. Badges and Accolades are able to be shown on your profile as well your directory card.

How to Receive Badges

You can receive/apply for a badge through the **Dashboard** tab. Select the badge button in black at the bottom right corner of the page. There you can select your desired badge depending on your skills, occupations and designations.

Please allow 24 to 48 hours for the approval process. Once approved, you will see the badge in **Settings**.

Display or Hide a Badge/Accolade

You can display or hide a badge or accolade by turning it ON/OFF in **Settings**.

Avatar & Visuals

How to Improve Your Avatars


There are countless of ways to improve your avatars. You can create your own visuals with a DIY approach using friendly, no-experience-needed tools & software such as Canva.com, or if you're more experienced Adobe Photoshop may be your tool of choice.

You can also decide to hire professional photographers or graphic designers to create more branded visuals.

The following software and platforms are great for a DIY approach on creating your own visuals and avatars.

i Canva

Canva is an Australian graphic design platform, used to create social media graphics, presentations, posters, documents and other visual content. The app includes templates for users to use.

 <https://www.canva.com/>

i Pixelied

Pixelied is a feature-rich design tool offering an extensive library of templates, photos, icons, illustrations, color palettes, and vectors.

 <https://pixelied.com/>

i Adobe Express

Adobe Express is a free online photo editor where you can easily create and share impactful images, social graphics, or animated designs that stand out on any channel, any device.

 <https://www.adobe.com/express/feature/image/editor>

i Adobe Photoshop

Adobe Photoshop is a raster graphics editor developed and published by Adobe Inc. for Windows and macOS. It was originally created in 1988 by Thomas and John Knoll. Since then, the software has become the industry standard not only in raster graphics editing, but in digital art as a whole.

 <https://www.adobe.com/ca/products/photoshop.html>

i Stencil

Stencil is a fantastically easy-to-use online graphic design tool and image editor built for business owners, social media marketers, and bloggers.

 <https://getstencil.com/>

i Unsplash

Unsplash is a website dedicated to sharing stock photography under the Unsplash license. Since 2021, it has been owned by Getty Images. The website claims over 265,000 contributing photographers and generates more than 16 billion photo impressions per month on their growing library of over 3.48 million photos.

 <https://getstencil.com/>

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Now, you can go do what you do best!



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