

# HUB USER GUIDE

## FOREWORD

The purpose of this document is to guide you through the sections of the HUB (also referred to as the Appointment Hub) in order to fully understand the various features and configurations of the platform

This user guide is therefore considered a technical reference that provides further details in regards to the Hub.

## INTRODUCTION

The Hub compiles all of your patients' appointments live, regardless from which source the appointments are made.

Keep in mind that you will continue to use your EMR (Electronic Medical Records) system and your existing appointment portal to accomplish your daily tasks. The Hub is merely the intermediary through which appointments make their way into your agenda. You can modify the parameters that govern the Hub's behaviour on your clinic's appointments at any given moment.

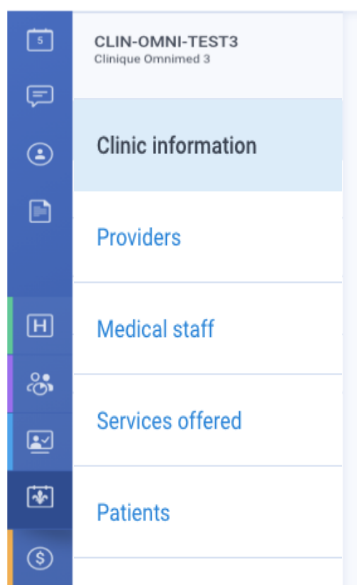
## OBJECTIVES

The main objective of this document is to provide you with a technical reference guide. Each feature is broken down into details in an effort to clarify the functionalities of the Hub platform. Know that the platform was created with the intention of being user friendly for people of all technical skill levels.

A compilation of FAQs are available at all times on the online Help Center. The articles on the Help Center can give you step-by-step guides in the configuration and use of the platform.

# TABLE OF CONTENTS

<b>TABLE OF CONTENTS</b>	<b>2</b>
<b>TAB DETAILS</b>	<b>3</b>
CLINIC INFORMATION	3
PROVIDERS	4
PROVIDERS: APPOINTMENT PROVIDER	4
PROVIDERS: ELECTRONIC MEDICAL RECORD (EMR)	5
MEDICAL STAFF: WHAT DEFINES A MEMBER?	5
MEDICAL STAFF → PERMISSIONS	6
MEDICAL STAFF → PERMISSIONS: NO ACCESS	6
MEDICAL STAFF → PERMISSIONS: CLINIC MANAGER	6
SERVICES OFFERED	7
SERVICES OFFERED → INITIAL CONNECTION	7
SERVICES OFFERED → COLUMN DESCRIPTIONS	8
SERVICES OFFERED → ACTIVE SERVICES	9
SERVICES OFFERED → HOW TO CONFIGURE A SERVICE	10
MANDATORY CONFIGURATIONS TO PUBLISH A SERVICE	10
SERVICES OFFERED → ACTIVE SERVICES	12
SERVICES OFFERED → ACTIVE SERVICES → SETTINGS	12
SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → SERVICE NAME	12
SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → APPOINTMENT TYPE	13
SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → APPOINTMENT CATEGORY	13
SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → DISPLAY THE DOCTOR'S NAME TO THE PATIENTS	14
SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → AVAILABILITIES	14
SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → WEB OPTIONS	15
SERVICES OFFERED → ACTIVE SERVICES → WEB OFFER	15
SERVICES OFFERED → ACTIVE SERVICES → ACCESS RESTRICTIONS	16
SERVICES OFFERED → ACTIVE SERVICES → AUTOMATIC PUBLICATION	17
SERVICES OFFERED → ACTIVE SERVICES → AUTOMATIC PUBLICATION → RATIO	17
SERVICES OFFERED → APPOINTMENT LIMIT	18
<b>PATIENTS</b>	<b>19</b>



## TAB DETAILS

Each of the five tabs visible on the left will be discussed in detail in an effort to guide you through the Hub platform. Each sub-tab will also be discussed.

## CLINIC INFORMATION

It is within this tab that you will validate your clinic's information. Take a moment to ensure that the entered information is correct. If anything needs to be modified, click on the blue "Edit" button to make the desired changes.

Clinic information

Providers

Medical staff

Services offered

Patients

Your clinic

Edit

Identification

Clinic name16/200 charac.

Acronym

The acronym serves as a unique identifier and is necessary in order to differentiate professionals with more than one workplace.

Contact information

Find an address

Additional information (office number, floor number)9/30 charac. Optional

Phone number

ExtensionOptional

Version 1.5 - August 2021 3

# PROVIDERS

There are two subsections within this tab: “Appointment” and “Electronic Medical Record (EMR)”.

The screenshot shows a sidebar on the left with a menu containing: Clinic information, Providers (highlighted), Medical staff, Services offered, and Patients. The main content area has two tabs: Appointment (active) and Electronic Medical Record (EMR). Below the Appointment tab, the text "Appointment provider" is displayed.

## PROVIDERS: APPOINTMENT PROVIDER

In the **Providers** tab, in the **Appointment** sub-tab, confirm that the selected appointment provider is indeed the one your clinic uses.

As written on the screen-clipping below, contact us if you need to make changes to your appointment provider.

This screenshot shows the "Appointment provider" selection screen. At the top, there are tabs for "Appointment" and "Electronic Medical Record (EMR)". Below the tabs, a message states: "In order to make changes to your appointment provider(s), please contact us at 1-877-313-1594." The main area displays several provider options, each with a checkbox and a logo:

- ☒ Québec Medical Appointment Scheduler (with logo)
- ☐ Bonjour-santé (with logo)
- ☐ Pomelo (formerly Chronometrig) (with logo)
- ☐ Myle - By MEDFAR (with MEDFAR CLINICAL SOLUTIONS logo)
- ☐ TAP médical (with tap medical logo)

## PROVIDERS: ELECTRONIC MEDICAL RECORD (EMR)

Once again, confirm that the selected EMR provider is indeed the one your clinic uses. As written on the screen, contact us if you need to make any changes to your EMR provider.

The screenshot shows a web application interface for selecting an EMR provider. On the left is a sidebar with navigation links: 'Clinic information', 'Providers' (highlighted), 'Medical staff', 'Services offered' (with a green dot), and 'Patients'. The main content area has a header with 'Appointment' and 'Electronic Medical Record (EMR)' tabs. Below the header, the title 'Electronic Medical Record (EMR) provider' is followed by an information icon and a note: 'In order to make changes to your Electronic Medical Record (EMR) provider, please contact us at 1-877-313-1594.' The main area contains a grid of nine provider options, each with a radio button and a logo: Kinlogix EMR, Medesync EMR (selected), Myle - By MEDFAR, MEDFAR CLINICAL SOLUTIONS, Ofys, Omnimed, Softinfo, Toubib, and No EMR (standalone). The 'No EMR (standalone)' option includes a note: 'Select this option if you do not have an Electronic Medical Record (EMR) provider.'

## MEDICAL STAFF

Clinic information

This section allows you to validate the imported information listing your clinic's medical staff. All of the information comes from your EMR provider.

Providers

Medical staff

### MEDICAL STAFF: WHAT DEFINES A MEMBER?

Services offered

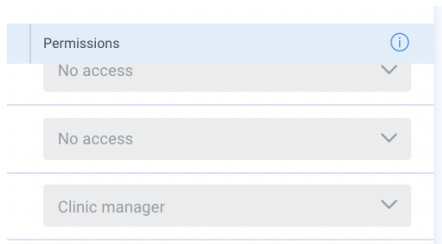
A member is any person in your organisation to whom an appointment can be attributed, be they a physician or any other medical professional. Administrative personnel can also be found in the list of members. It is within this section that you can configure a member's access to the Hub platform.

Patients

## MEDICAL STAFF → PERMISSIONS

Permissions in this context refer to a staff member's authorization to make modifications on the Hub platform.

Each medical staff member can be assigned a permission that reflects their access level on the Hub platform. Generally speaking, the majority of your clinic's medical staff will be given the permission level **No access**.



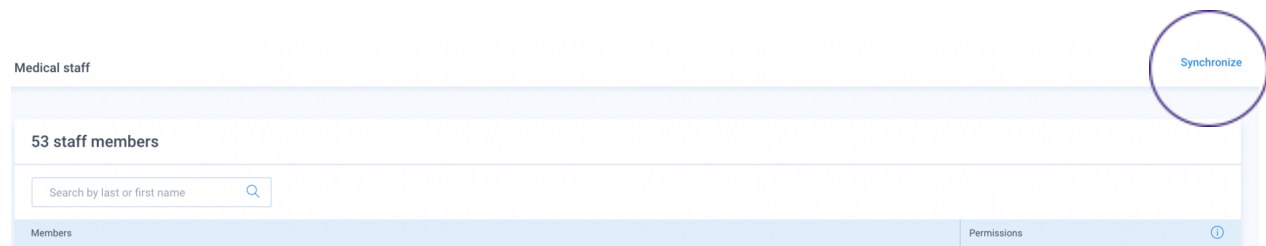
### MEDICAL STAFF → PERMISSIONS: NO ACCESS

Most staff members will be listed as having no access, since they will not need to access the configuration parameters of the Hub platform.

### MEDICAL STAFF → PERMISSIONS: CLINIC MANAGER

Clinic Manager is the permission level given to the person(s) responsible for the configuration of the platform. This permission level grants access to the Hub itself and to make any modifications in the parameters.

Any modification or addition of a staff member must be done directly within your EMR system. Once the modifications have been made within your EMR, they must then be synchronized in the Hub. The platform will automatically update any information between the appointment providers and the EMR. Simply click on the “Synchronize” button at the top right corner of the webpage.



# SERVICES OFFERED

Clinic information

Providers

Medical staff

Services offered

Patients

The **Services Offered** tab is separated in two sub-sections: “Active services” and “Appointment limit”. The list of offered services comes directly from your EMR provider.

Active services ● Appointment limit ●

32 services

EMR service name	Type(s)	Status ⓘ
------------------	---------	----------

## SERVICES OFFERED → INITIAL CONNECTION

When you first connect to the Hub, a window will appear requiring you to assign one or more **types** to every offered service in the clinic.

You have the possibility to modify the **type** at a later point in time.

*Note: The screen clipping below is from a French language interface.*

Définir un type par service

5 services

Rechercher par nom de service

Nom du service DME	Type ⓘ
Rendez-vous journée même Rendez-vous journée même	0 types <input type="button" value="v"/>
Sans rendez-vous Sans rendez-vous	0 types <input type="button" value="v"/>
Suivi - Cas complexes Suivi - Cas complexes	0 types <input type="button" value="v"/>
Suivi de grossesse Suivi de grossesse	0 types <input type="button" value="v"/>
Suivi Régulier Suivi Régulier	0 types <input type="button" value="v"/>

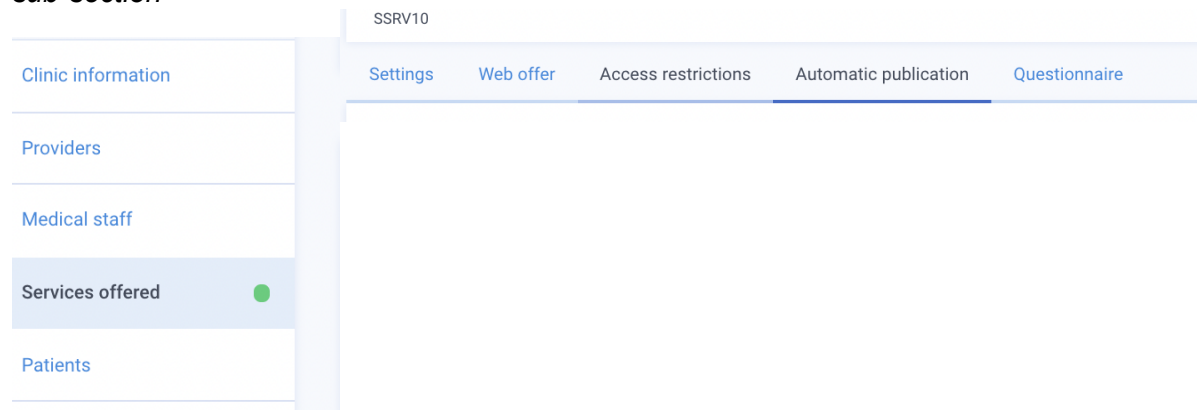
Vous devez appliquer un ou des types à vos services, afin de passer à la configuration.

Terminé

You are **required to** assign a **type** to every service appearing in the window. The **types** are listed below:

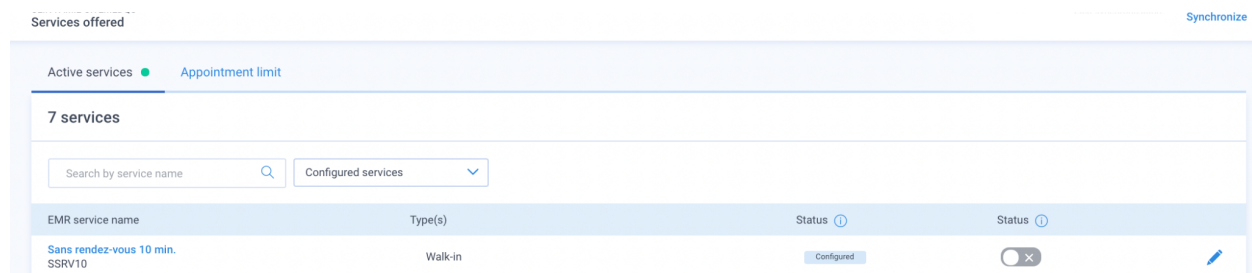
- Walk-in
- Priority Consultation
- Regular Follow-up
- Periodic or Preventive Monitoring
- Pregnancy Follow-up
- Follow-up of a Child Aged 0 to 5

*\*The service type **Walk-in** must be selected alone. Once selected, it's not possible to select another type of service as well. The **Walk-in** type must be selected alone due to the parameter called **Ratio of availabilities offered to patients** found within the **Automatic publication** sub-section*



## SERVICES OFFERED → COLUMN DESCRIPTIONS

Every service imported from your EMR system appears in the **Active Services** sub-section of the **Services offered** tab.





Column	Description
<b>EMR Service Name</b>	The name of the service, as written in your EMR system
<b>Type(s)</b>	The type must be configured to classify the service offered
<b>Status</b>	2 status options: configured or not configured. When the service parameters have been adequately configured, the status will automatically change to “Configured”.
<b>Status (with toggle option)</b>	<p>When this column is toggled on, the button will appear in green and show a check-mark. This signifies that the service is now published online and is visible to citizens looking to book a medical appointment online.</p> <p>When this column is toggled off, as seen in the screen clipping above, the button will appear in grey. This means that the service is not published on the web and is therefore not visible to citizens looking to book an appointment online. It is only available and visible to clinic personnel working from within their EMR system.</p>
<b>Edit Pencil Icon</b>	Click on this pencil icon to edit a service.

## SERVICES OFFERED → ACTIVE SERVICES

This section consists of the services imported from your EMR provider.

<b>Your attention please!</b>
<p>The service configuration step takes time. Make sure to properly define which services you want to offer online and take the time to accurately configure each one for your clinic. Go through the <b>Settings</b>, <b>Web offer</b>, <b>Access restrictions</b>, and <b>Automatic publication</b> tabs within each service in order to complete the configuration.</p>

[Return to the service list](#)

Sans rendez-vous 10 min.  
SSRV10

Configured

Not published on the Web

Settings

Web offer

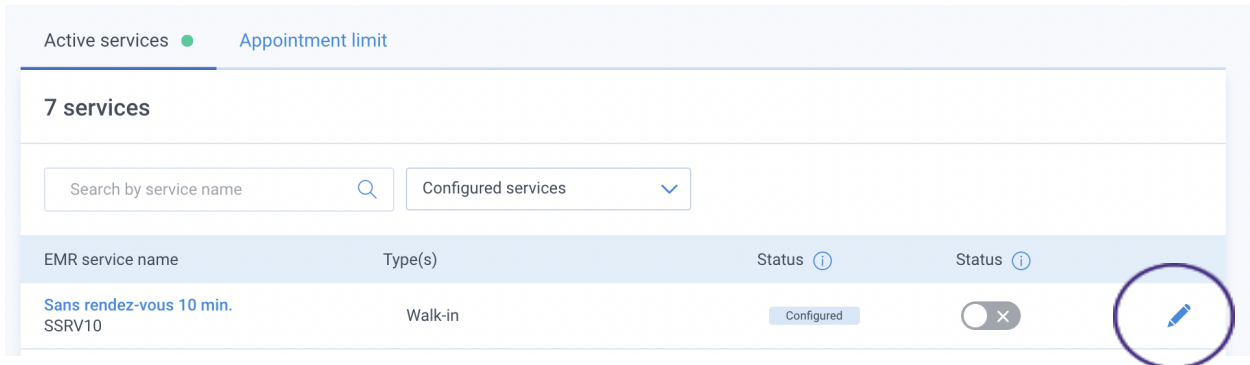
Access restrictions

Automatic publication

Questionnaire

## SERVICES OFFERED → HOW TO CONFIGURE A SERVICE

- Click on the edit pencil symbol



Active services ● Appointment limit

7 services

Search by service name  Configured services

EMR service name	Type(s)	Status ⓘ	Status ⓘ
Sans rendez-vous 10 min. SSRV10	Walk-in	Configured	<input type="checkbox"/> <input type="button" value="x"/>

If need be, consult the [Help Center](#) (links to come)

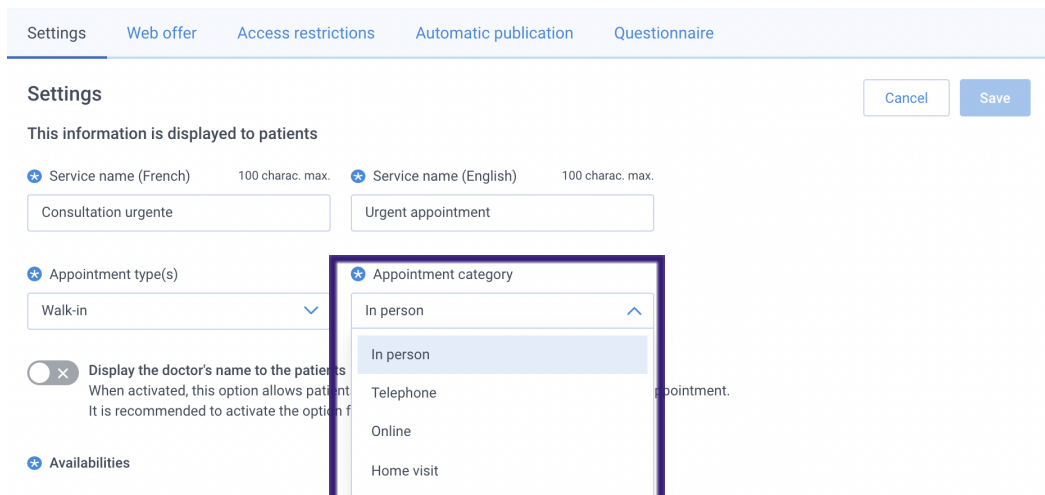
- What is a service type?
- How to attribute a type to the “Services offered” during the initial set-up.
- How to know whether or not a service has been assigned a type.
- What are the exceptions when assigning a type to a service?
- How many types can be assigned to a service?

## MANDATORY CONFIGURATIONS TO PUBLISH A SERVICE

In order for a service to be offered online to citizens, the configurations below must be set:

1. In the **Settings** tab, an **Appointment category** must be set for a service **type**.

The categories are as follows: In person, Telephone, Online, Home visit.



Settings Web offer Access restrictions Automatic publication Questionnaire

Settings

This information is displayed to patients

★ Service name (French) 100 charac. max. ★ Service name (English) 100 charac. max.

Consultation urgente Urgent appointment

★ Appointment type(s) Walk-in

★ Appointment category

- In person
- In person
- Telephone
- Online
- Home visit

Display the doctor's name to the patients ☐  When activated, this option allows patient... It is recommended to activate the option f...

★ Availabilities

2. In the **Settings** tab, a **Service name** must be entered in both French and English.

Settings Web offer Access restrictions Automatic publication Questionnaire

**Settings** Cancel Save

This information is displayed to patients

\* Service name (French) 100 charac. max. \* Service name (English) 100 charac. max.

Consultation urgente Urgent appointment

\* Appointment type(s) \* Appointment category

Walk-in In person

3. In the **Settings** tab, an **Availability** must be selected.

Settings Web offer Access restrictions Automatic publication Questionnaire

\* Availabilities

☒ All patients

The service is available for FMG, Non-FMG and Orphan patients to make an appointment, regardless of their origin.

☐ FMG Patients

Allows FMG patients to make an appointment for this service with their family physician or another from the clinic.

☐ Patients with a physician

An appointment for this service will be available to a patient if it is offered in their family physician's schedule.

4. In the **Automatic Publication** tab, the default publication must be configured.

Settings Web offer Access restrictions Automatic publication Questionnaire

**Automatic publication** ⓘ Edit

Automatic publication Block start time Block end time

20 Hour(s) early 08 : 00 to 12 : 00

The next publication will be at August 18, 2021 at 12:00 for the appointments of August 19 for the block of 08:00 to 12:00

## SERVICES OFFERED → ACTIVE SERVICES

Let's take a closer look at the sub-tabs that allow us to configure services. You will need to repeat the configuration steps for every service offered by your organization.

## SERVICES OFFERED → ACTIVE SERVICES → SETTINGS

To modify any information, click on the blue **Edit** button on the right hand side.

The screenshot shows the 'Settings' tab for a service configuration. At the top, there are navigation tabs: 'Settings', 'Web offer', 'Access restrictions', 'Automatic publication', and 'Questionnaire'. The 'Settings' tab is active. Below the tabs, there is a section titled 'Settings' with an 'Edit' button on the right. The main content area is divided into two sections: 'This information is displayed to patients' and 'Web options'. The 'This information is displayed to patients' section includes fields for 'Service name (French)' and 'Service name (English)', both with a 100 character limit. Below these are dropdown menus for 'Appointment type(s)' and 'Appointment category'. There is also a toggle switch for 'Display the doctor's name to the patients'. The 'Web options' section includes a 'Deadline for online cancellations' dropdown menu. The 'Availabilities' section shows three radio button options: 'All patients', 'FMG Patients', and 'Patients with a physician'.

## SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → SERVICE NAME

### Settings

This information is displayed to patients

<input checked="" type="radio"/> Service name (French)	100 charac. max.	<input checked="" type="radio"/> Service name (English)	100 charac. max.
<input type="text" value="Consultation urgente"/>		<input type="text" value="Urgent appointment"/>	

name that will be clearly understood by a layperson booking the appointment. You have a 100 character limit when writing the name, and a name must be assigned in both English and French.

You absolutely must assign a name to the service. This name will be visible to citizens booking appointments online. Make sure to give the service a

## SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → APPOINTMENT TYPE

Assign one or more appointment **types** to a service among the options available in the drop-down list:

Appointment Type	Description
<b>Walk-in (cannot be combined with any other type)</b>	Recent health problem or aggravation of an existing health problem requiring consultation within 24 to 48 hours. For citizens of all ages.
<b>Priority Consultation</b>	Concerning health problem requiring consultation within the week. For citizens of all ages.
<b>Regular Follow-up</b>	Consultation to follow-up on a known health issue for which there has already been a consultation. For citizens aged 6 years old and up.
<b>Periodic or Preventive Monitoring</b>	Consultation for a preventative or periodic examination as part of an established follow-up routine with a healthcare professional (every year to every 3 years depending on the age group).
<b>Pregnancy Follow-up</b>	Consultation to follow-up with a pregnancy.
<b>Follow-up of a Child Aged 0 to 5</b>	Consultation to ensure proper follow-up of a child between 0 and 5 years old (childhood development, vaccination, etc).

The **Walk-in** option cannot be selected along with other appointment **types** for any given service configuration.

## SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → APPOINTMENT CATEGORY

The screenshot shows a configuration interface for appointment types and categories. On the left, under 'Appointment type(s)', a dropdown menu is set to 'Walk-in'. Below it is a toggle switch for 'Display the doctor's name to the patients', which is currently turned off. At the bottom left is a section for 'Availabilities'. On the right, under 'Appointment category', a dropdown menu is open, showing four options: 'In person' (highlighted), 'Telephone', 'Online', and 'Home visit'.

Once you've selected an **appointment type**, you must assign an **appointment category** to your service. The table below lists the appointment category options:

Appointment Category	Description
In person	The citizen physically presents themselves to the clinic to meet with a healthcare professional.
Telephone	The healthcare professional calls the citizen by telephone.
Online	The healthcare professional and citizen communicate online via a web platform of some sort.
Home visit	The healthcare professional physically presents themselves to the citizen's home.

## SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → DISPLAY THE DOCTOR'S NAME TO THE PATIENTS

This toggle button activates whether or not the name of the physician will be visible to the citizen making an appointment online. From the outset, this option is deactivated.



**Display the doctor's name to the patients**

When activated, this option allows patients to see the doctor's name when scheduling an appointment.

It is recommended to activate the option for the follow-up appointments.

## SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → AVAILABILITIES

Click on the box describing the availability you wish to activate. An availability option must be configured for each service.

### ✦ Availabilities

☒ All patients

The service is available for FMG, Non-FMG and Orphan patients to make an appointment, regardless of their origin.

☐ FMG Patients

Allows FMG patients to make an appointment for this service with their family physician or another from the clinic.

☐ Patients with a physician

An appointment for this service will be available to a patient if it is offered in their family physician's schedule.

## SERVICES OFFERED → ACTIVE SERVICES → SETTINGS → WEB OPTIONS

Web options  
Applicable only for services published on the Web

Deadline for online cancellations

12 Hour(s) ▼

Edit

This section allows you to adjust the deadline for which appointments can be canceled online. Once the deadline has passed, the citizen must contact the clinic directly to cancel an appointment.

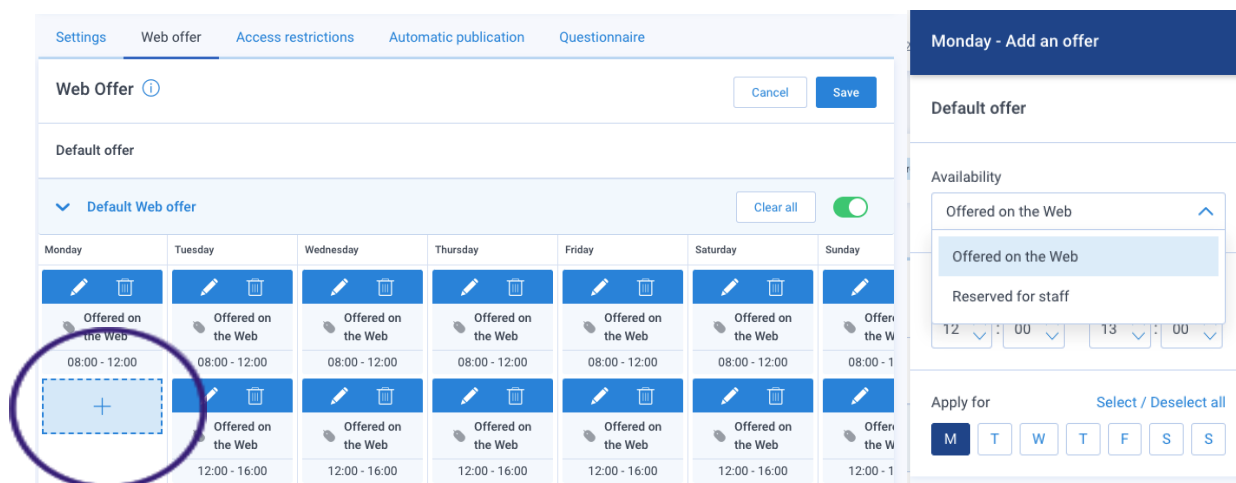
## SERVICES OFFERED → ACTIVE SERVICES → WEB OFFER

The **Web Offer** section is used to define whether or not a time slot will be available online for each offered service, and for the physicians working in the clinic.

You must start off by building a default web offer, and then personalising this offer with each physician's preferences.

### Adding a time slot when configuring a service:

- Click on the + symbol in the table



- Select one of the two availability options in the window that appears:
  - **Offered on the web:** The time slot in question will consist of appointments that are reserved via an online portal by citizens who need them.
  - **Reserved for staff:** The time slot in question will consist of appointments that are reserved for clinic use. The clinic's administrative staff will reserve appointments in these time slots themselves on a patient's behalf.

- **Determine** the start and end time of the offer in question.
- **Select** the days of the week for which the offer applies. Be careful not to overlap with an already existing offer.
- **Save** your modifications by clicking on the “Apply” button at the bottom right corner.

### Your attention please!

The more time slots you offer on the web, the more availability citizens will find when going online to book an appointment with your clinic.

Even if a time slot is configured as a web offer, nothing stops administrative staff from assigning appointments to those time slots themselves.

If need be, consult the [Help Center](#) (links to come)

-How to add a web offer.

- How to publish web offers online.

-How to configure specific web offers for physicians.

## SERVICES OFFERED → ACTIVE SERVICES → ACCESS RESTRICTIONS

Access restrictions allow you to set age and sex related patient parameters for a given physician, and only for the service you are in the process of configuring.

When the default restriction is configured, the parameter will apply to all the physicians in your clinic. If a specific restriction is configured, the specific restriction will take precedence over the default restriction.



If need be, consult the [Help Center](#) (links to come)

- What is the purpose of default restrictions?
- How to configure default restrictions.
- How to configure specific restrictions for a physician.

## SERVICES OFFERED → ACTIVE SERVICES → AUTOMATIC PUBLICATION

The automatic publication parameter must be configured for each of your clinic's services. This parameter controls the frequency under which an offer is published online. The service is published according to the assigned date and hour frequency you configure in this section.

Once the default publication frequency is configured, it applies to all the physicians in the clinic who offer this service. If a specific publication frequency is configured for a given physician, it will take precedence over the default publication frequency.



The screenshot shows a web interface with a top navigation bar containing 'Settings', 'Web offer', 'Access restrictions', 'Automatic publication' (which is highlighted), and 'Questionnaire'. Below the navigation bar, the 'Automatic publication' section is displayed. It features a title 'Automatic publication' with an information icon, an 'Edit' button, and a configuration area. The configuration area includes three main sections: 'Automatic publication' with a numeric input set to '20', a unit dropdown set to 'Hour(s)', and a frequency type dropdown set to 'early'; 'Block start time' with a time selector set to '08 : 00'; and 'Block end time' with a time selector set to '12 : 00'. Below these fields, a status message reads: 'The next publication will be at August 20, 2021 at 12:00 for the appointments of August 21 for the block of 08:00 to 12:00'.

## SERVICES OFFERED → ACTIVE SERVICES → AUTOMATIC PUBLICATION → RATIO

Configuring the ratio of availability offered to patients establishes a percentage of availability for differing types of citizens: FMG patients and Non-FMG patients. In order to offer greater flexibility and to optimise attendance rates, you can specify the FMG and Non-FMG attendance rate percentages, and toggle whether or not to exceed your set rates. You can also have the ratio lift entirely at a set point in time before the appointment.

- This parameter exists solely for the **Walk-in** appointment **type**.

## ✓ Ratio of availabilities offered to patients ⓘ

[Edit](#)

You can choose a percentage of availability for FMG, Non-FMG and orphans patients to make an appointment.

FMG

20%



Allow the % to be exceeded for FMG patients

Orphans

80%



Include Non-FMG patients in the Orphans %



Activate a ratio lift time

Once the ratio is lifted, all patients, regardless of their origin, can make an appointment.

## SERVICES OFFERED → APPOINTMENT LIMIT


The sub-tab **Appointment Limit** is used to grant a maximum number of appointments for a single person based on the **type** of appointment. The default configuration is 1 allowed appointment per **type**.

Active services ● Appointment limit

### Management of appointment limits per patient ⓘ

Type(s) of appointment	Included services	Number of appointments allowed
Walk-in	10min Walk-in, 20min Walk-in, Bandage Removal, Adapted Access	<div> <div>−</div> <div>1</div> <div>+</div> </div>
Priority Consultation	Infection Consult 10 mins, Infection Consult 20 mins	<div> <div>−</div> <div>1</div> <div>+</div> </div>
Periodic or Preventive Monitoring	<u>Pap Test</u>	<div> <div>−</div> <div>1</div> <div>+</div> </div>
Regular Follow-up	Follow-up 10 mins, Follow-up 20 mins	<div> <div>−</div> <div>1</div> <div>+</div> </div>
Pregnancy Follow-up	Pregnancy Follow-up 10 mins, Pregnancy Follow-up 25mins	<div> <div>−</div> <div>1</div> <div>+</div> </div>
Follow-up of a Child Aged 0 to 5	Infant Follow-up 10 mins, Toddler Follow-up 20 mins, Ped Follow-up annual	<div> <div>−</div> <div>1</div> <div>+</div> </div>

# PATIENTS

Clinic information
Providers
Medical staff
Services offered 
<b>Patients</b>

There is no manual import required from your patient data bank. The import will be done automatically whether the appointment is booked manually or whether a citizen books it themselves online.

Consult your EMR system to see your patient list.

## Your attention please!

This guide is constantly evolving. Anytime new features within the Hub are updated or enhanced, a new version of the guide will be available for download. The footnote will confirm the current document's version number and date.