Akario Enterprise
Administrator Manual

by DrFirst, Inc.

Baltimore Release

Powered by Moxy

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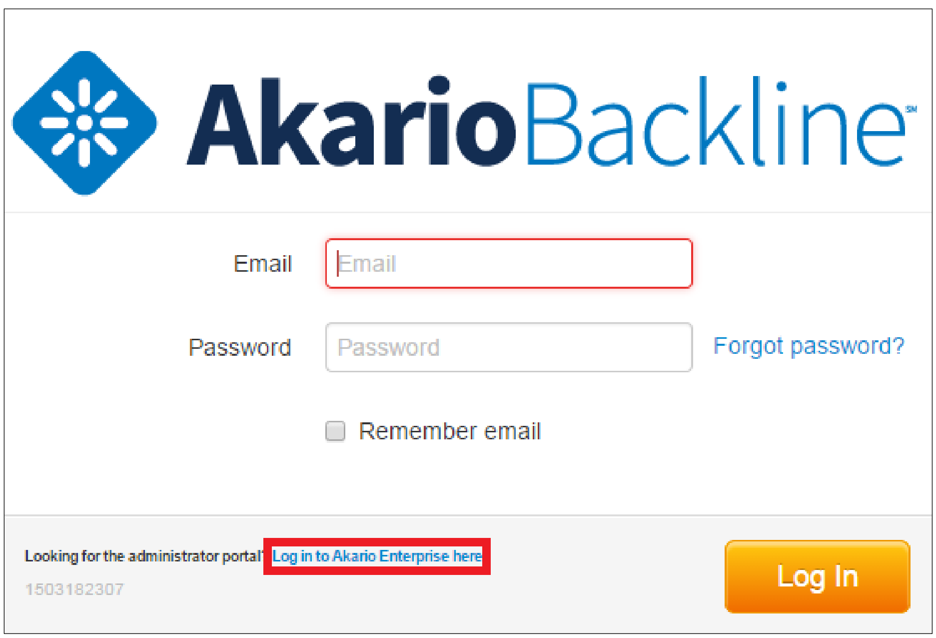
Contents

Introduction

Akario Backline is a secure, HIPAA-compliant tool for Enterprise members to communicate and collaborate instantly using the web or from a supported mobile device. Akario Enterprise allows administrators to manage their Backline users by creating accounts for members of their hospital or clinical environment as well as monitoring Backline usage and archive information.

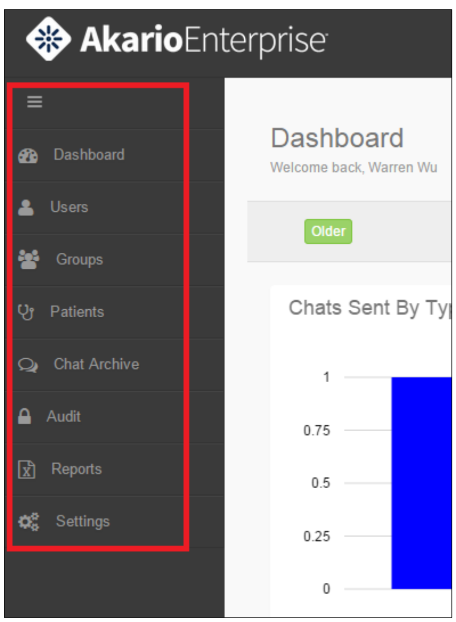
Accessing Akario Enterprise

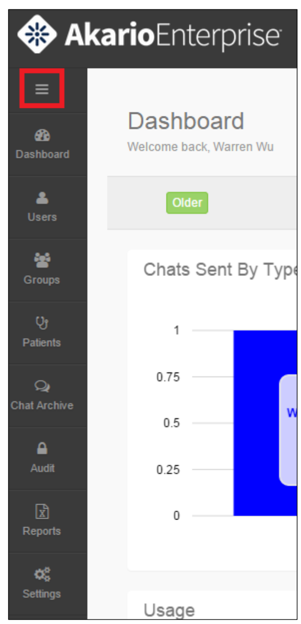
1. If you are set up as an Administrator, once you have received your registration email and successfully registered, you will now have access to Akario Enterprise. After registration you are automatically directed to the Akario Backline login screen where you can click on **Log in to Akario Enterprise here** to be re-directed to **https://admin.akariobl.com/**.



If you forget your password, on the Akario Enterprise login screen, you can click on **Forgot your password? Click here to reset your password**. You will receive an email to the account on file to reset your password.

Upon logging in you are automatically routed to the **Dashboard**. To navigate to the other sections of Akario Enterprise, on the left hand side you will see the sections of the console (Users, Groups, Patients, Chat Archive, Audit, Reports and Settings). The top button will consolidate the view so you can see more on the right hand side of the page. Certain tabs may not be displayed for your administrative role, please see the **User Roles** section for more details.

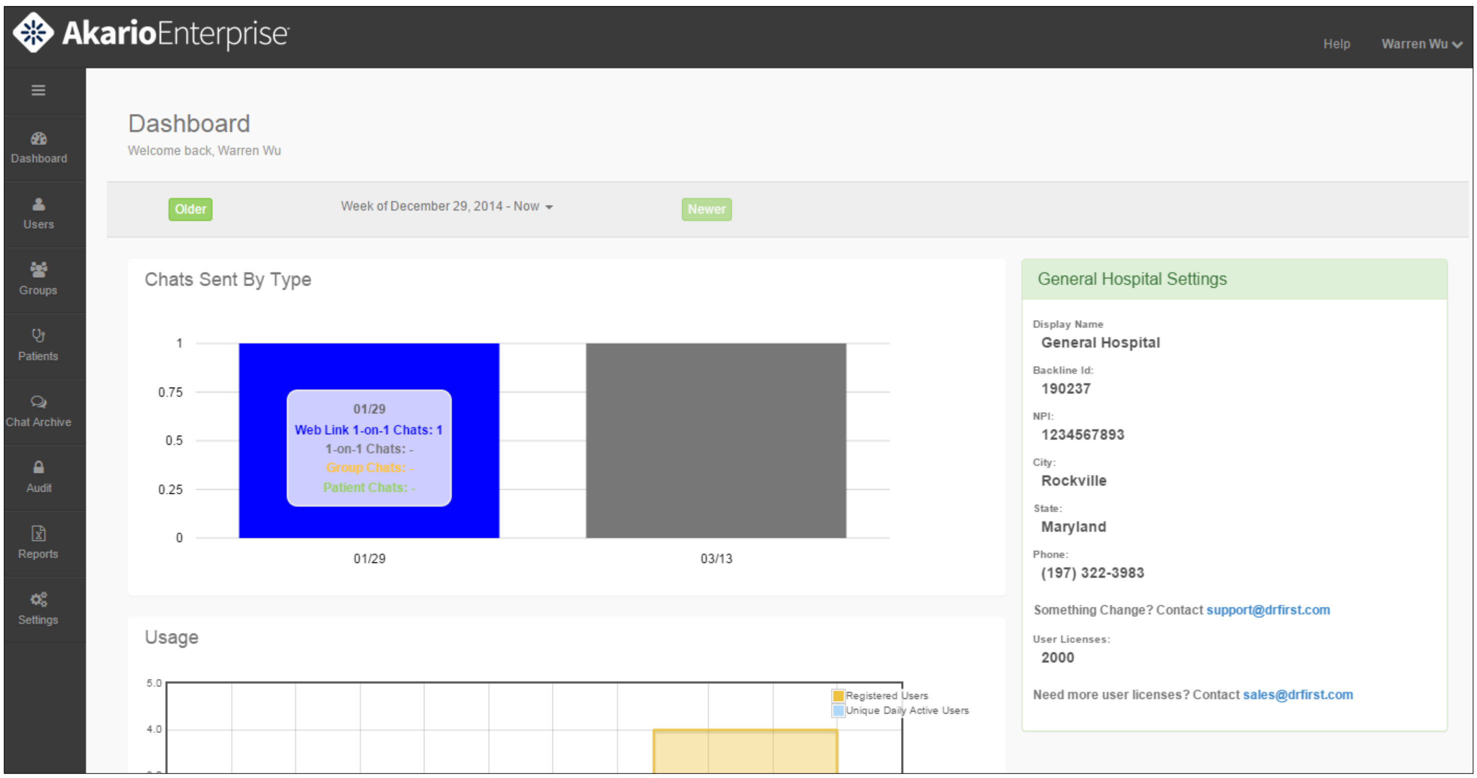




Dashboard

The Dashboard gives you a view of the organization as well as chat statistics. On this page you can view (and filter by date range):

- Organizations Settings (Display Name, Backline ID, NPI, City, State, Phone, User Licenses)
- Chats Sent By Type (1-on-1 Chats, Group Chats or Patient Chats)
- Usage (Registered Users vs Unique Daily Active Users)
- Average Daily Chats per Active User
- Chats Sent by Device Type (Web, iPhone or Android)



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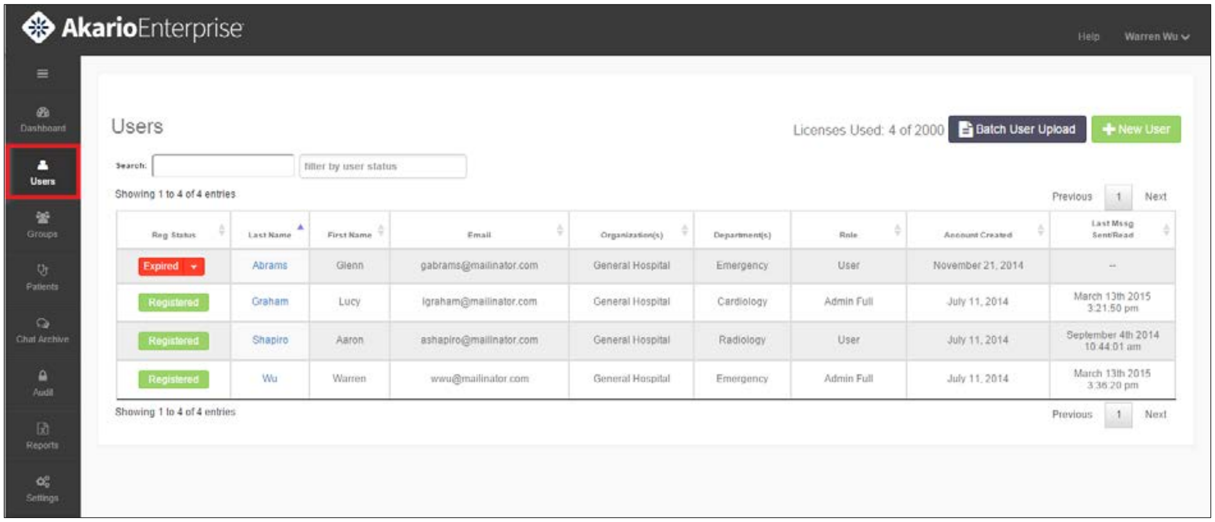
Users

The **Users** tab is where you can search for users, add a new user or use the batch upload to load multiple users. When viewing active users you can view:



- Registration Status:
  - Registered – The user has completed their onboarding registration email.
  - Pending – The user has been sent their onboarding registration email in the past 7 days but has not completed onboarding. If the user misplaces the email the administrator can click on **Resend Registration Email** to resend it to the email address on file. If the user does not have a valid email the administrator can give the user the **registration URL** in the dropdown which the user can paste into their internet browser to complete onboarding. The **Pending** dropdown will also show the date and time in which the invitation expires.
  - Expired - The user did not complete their onboarding registration email in the 7 day window in which it was sent. The administrator will need to open up the dropdown and click on **Resend Registration Email** to resend it to the email address on file. Their status will then change to **Pending**.
  - Disabled - The user's account has been disabled by an administrator.
- Last Name – The last name of the user is a hyperlink. When you click on the last name of the user you will be brought to the user's profile where you can edit their profile, activate/disable or reset their password.
- First Name
- Email
- Organization
- Department
- Role – User, Admin Limited, Admin Full
- Account Created Date
- Last Activity Date

The columns can be used to sort the users by any of the column headers (ex. sort by Registration Status to see which group of users are Registered, Pending, Expired or Disabled).

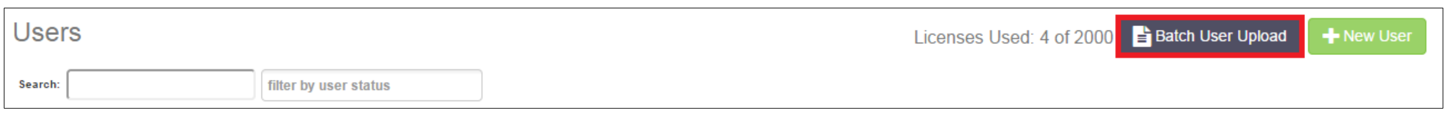
User Roles

There are three roles a user can have in Akario Backline.

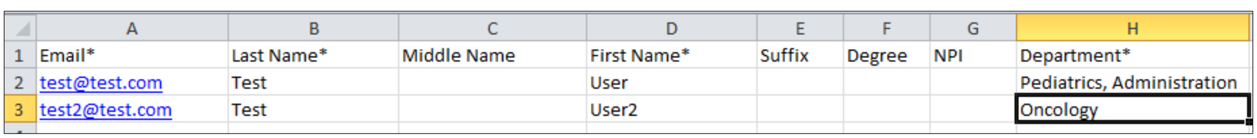
- **User** – Has access to **only** Akario Backline with no access to Akario Enterprise.
- **Admin Full** – Has access to **both** Akario Backline and Akario Enterprise with no limitations.
- **Admin Limited** – Has access to **both** Akario Backline and Akario Enterprise but is unable to view:
  - Patients
  - Chat Archive
  - Audit Logs

Batch User Upload

To upload multiple user accounts at one time you can do so through the **Batch User Upload** button on the **Users** page.

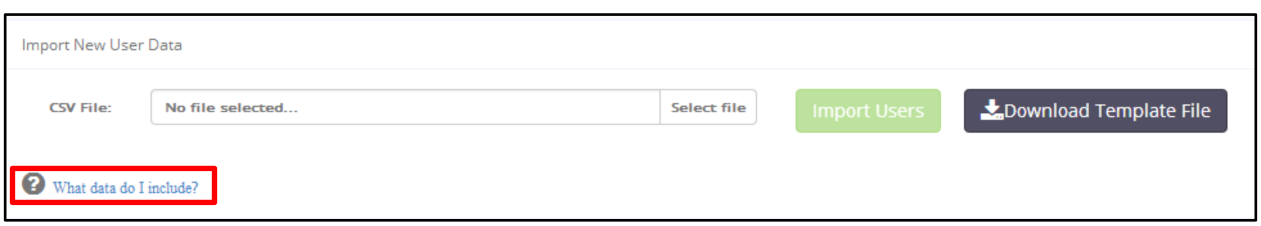


Click on **Download Template File** to download the excel spreadsheet. Once completed, save the file as type .csv, select the file on the upload page and click on **Import Users.**



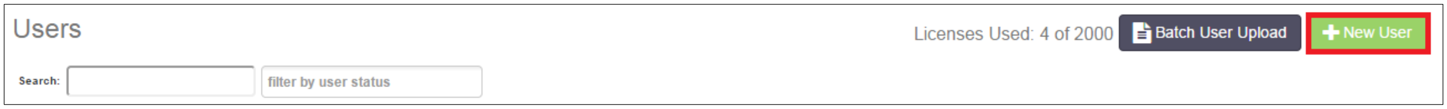
	A	B	C	D	E	F	G	H
1	Email*	Last Name*	Middle Name	First Name*	Suffix	Degree	NPI	Department*
2	test@test.com	Test		User				Pediatrics, Administration
3	test2@test.com	Test		User2				Oncology

If there are any errors with the spreadsheet they will show up on the page after the import has occurred (ex. email already in use, incorrect format). If you click on the **? What data do I include?** It will show you what is required and what the formatting should be.

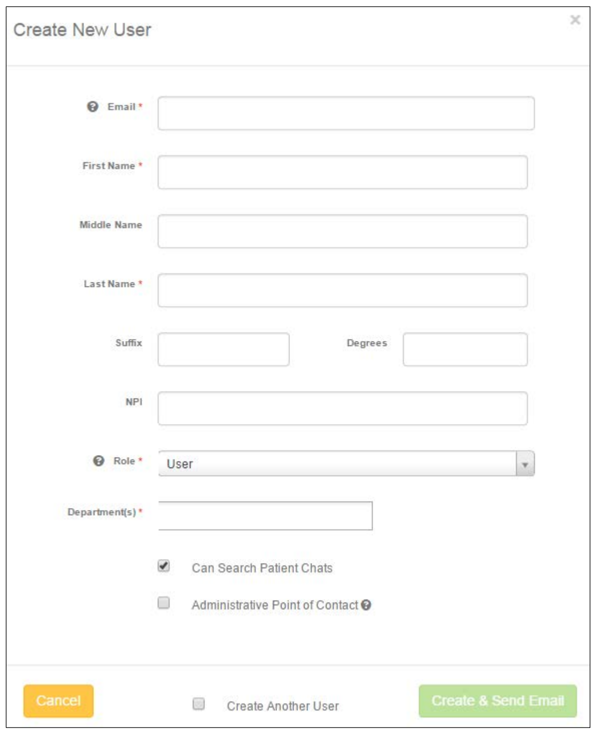


Add New User

To add a new user in one at a time, click on **New User** on the **Users** tab.



There are five required fields for creating a new user:



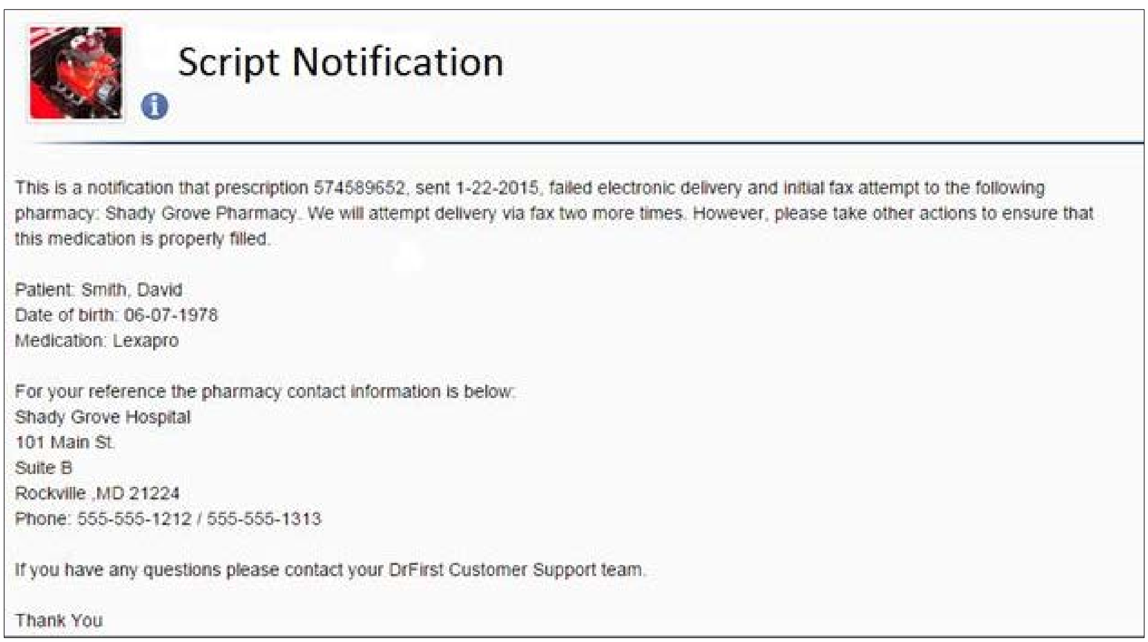
- **Email** – The email must be unique. If the user does not have a valid email, please input a "dummy" email address and after creating the account distribute the **registration URL** from the **Pending** dropdown. This will allow the user to go through onboarding without an email address.
- **First Name**
- **Last Name**
- **Role –** See **User Roles** section for more details.
- **Department** – If the department already exists it will appear when you click on the box for departments. If it does not exist, simply type the department name and click on the option below that says **(New Department)**. This will create the department and also attach that particular user to the department.

- **Can Search Patient Chats** – You can determine if you want a user to be able to search for Patient Chats.
- **Administrative Point of Contact** – You can designate a user to be the point of contact if you want them to receive e-mails about the status of the organization such as when the license limit is close to being exceeded.

If you would like to create more than one new user, check off **Create Another User** and then click on **Create & Send Email**. Once you click **Create & Send Email** it will immediately send the onboarding registration email over to the user.

Notifications of Undeliverable Prescriptions [NUS]

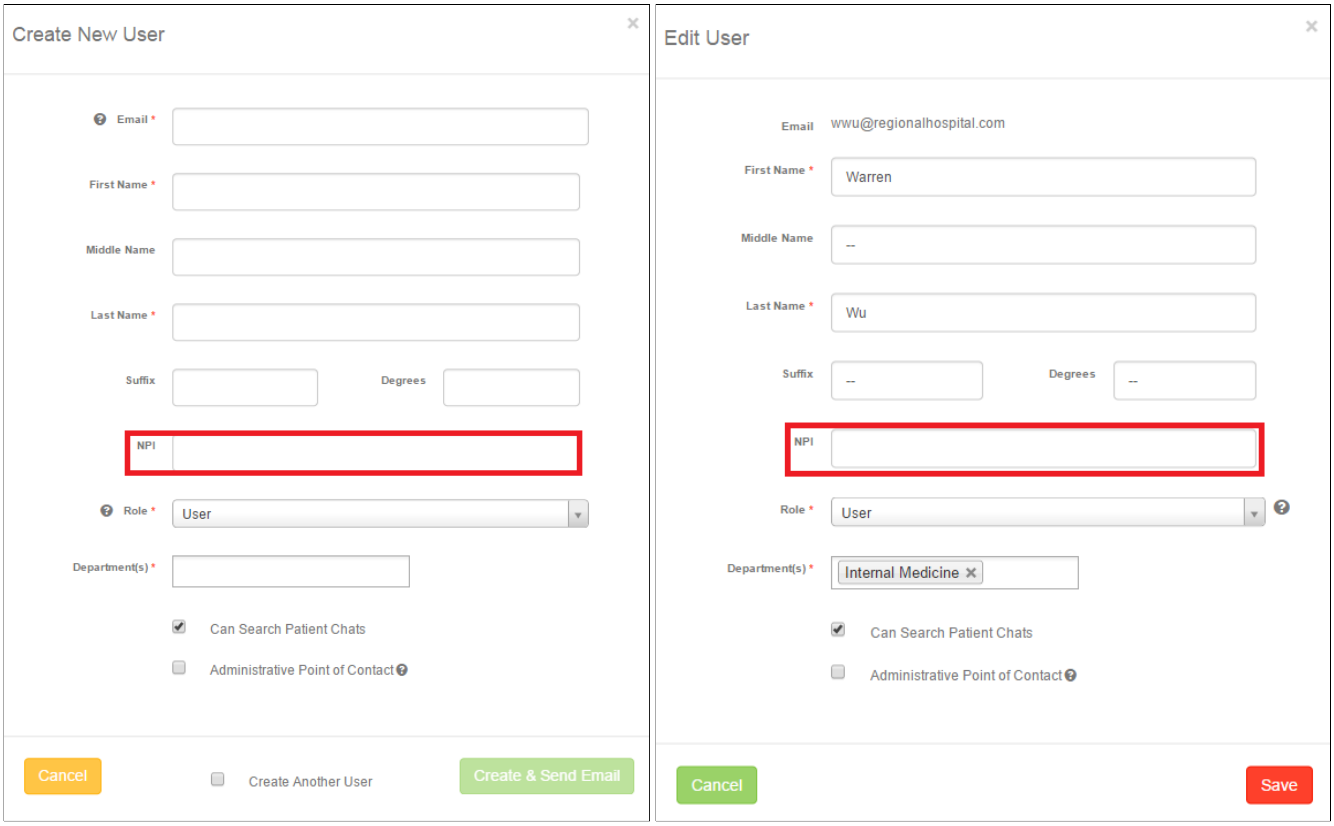
Akario Backline is now integrated with our electronic prescribing solution, Rcopia, allowing providers to be notified of undeliverable prescriptions via Akario Backline's secure messaging alert system via mobile device or the Backline web application. Providers can, if preferred, assign a delegate to receive these notifications.



Prescribing providers will receive a secure automated message through Akario Backline at the time the first fax for a prescription fails to reach the pharmacy. The NUS message includes prescription details, information about how to resend the prescription and the pharmacy's contact information.

Setting up a Provider

To setup a provider for NUS, either when creating a new user or editing an existing user, the **NPI** must be filled out. Once this is populated, the provider will begin receiving undeliverable prescriptions through Akario Backline.



NUS Delegation

There are instances where a provider may not want to receive the Akario Backline notification that a prescription was not delivered electronically. In these instances, the provider may assign a delegate to receive the notification (ex. Dr. Smith wants his medical assistant Diane to receive his undeliverable prescription notifications via Akario Backline).

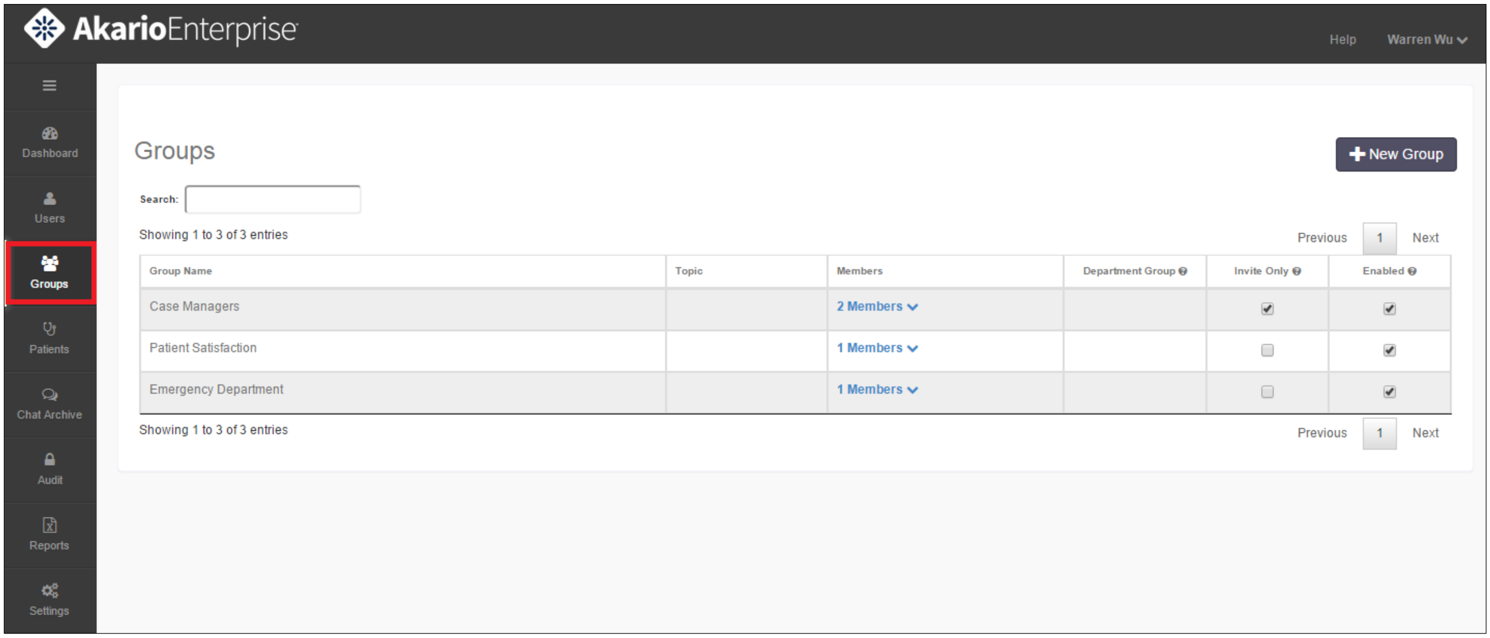
In order to setup delegation for a provider, first you will want to make sure that the delegate is setup in Akario Backline with an account. You will then populate the NUS delegate Excel spreadsheet and send it to your Account Manager or Implementation Specialist. If you need the NUS delegation spreadsheet please reach out to your Account Manager or Implementation Specialist.

	A	B	C	D	E	F	G	H
1	provider_fname	provider_lname	provider_email	provider_npi	delegate_fname	delegate_lname	delegate_email	start_date
2	John	Smith	jsmith@gmail.com	1629071337	Jane	Doe	janedoe@gmail.com	
3								
4								

Once this information is provided to DrFirst, the delegate can be set up to receive the Notification of the Undeliverable Script via Akario Backline instead of the provider.

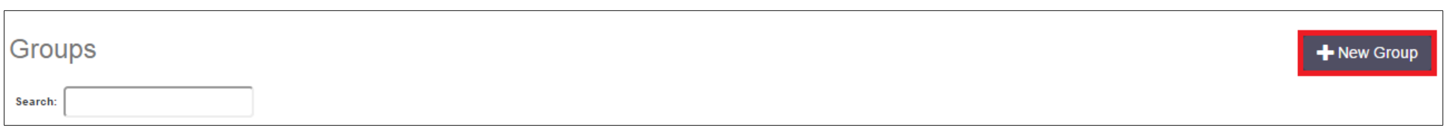
Groups

The Groups tab allows you to create a new group as well as modify an existing group.

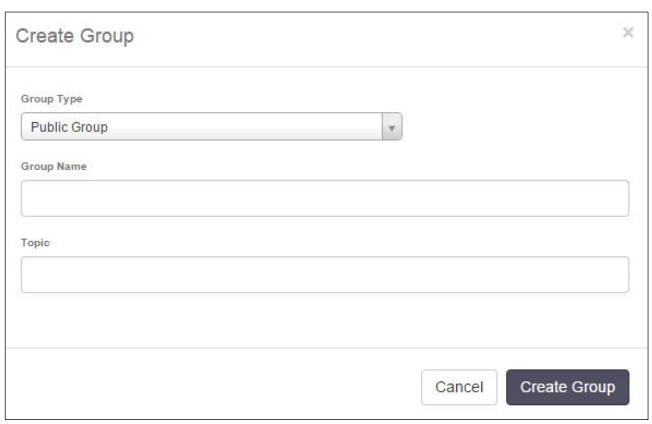


Create New Group

To create a new group, click on **New Group**.



You can make the group **Public** or **Private**. The **Group Name** is required, the **Topic** is optional.



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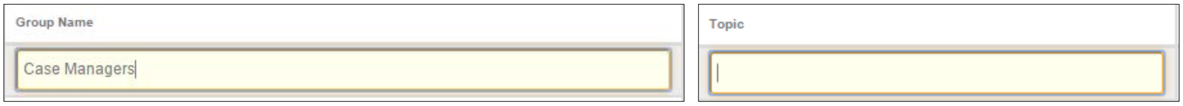
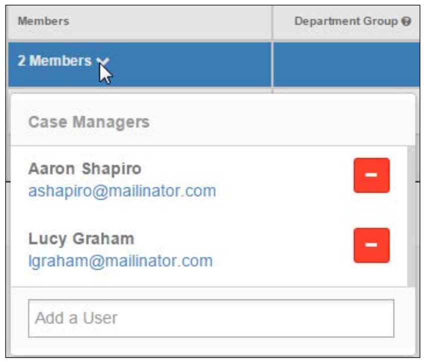
Modify an Existing Group

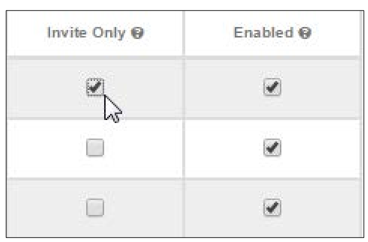
If you click on the **Group Name** or **Topic** an edit box will appear where you can modify the group name.



If you need to add or remove a user from a group chat, select the dropdown in the **Members** column.



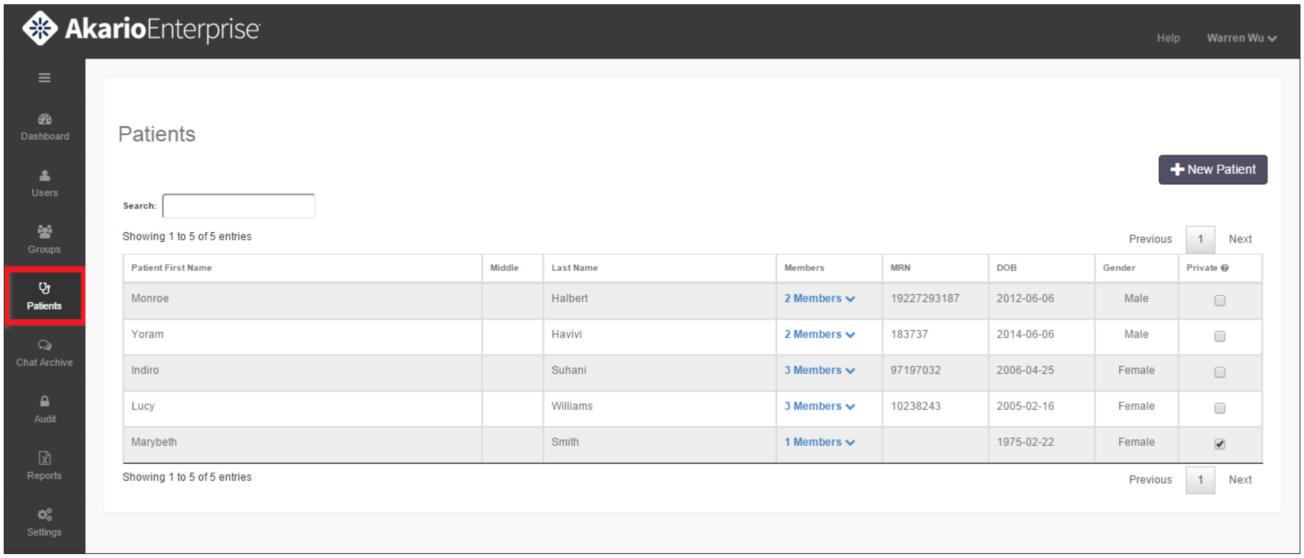
Group chats can be set to **Invite Only** to make the groups private which will not appear in the group search results. Groups are automatically **Enabled** when created but to disable a group (thus removing it from members' group lists and the group search) you can uncheck **Enabled**. The history of the group will be stored in Akario Enterprise even when disabled.



Patients

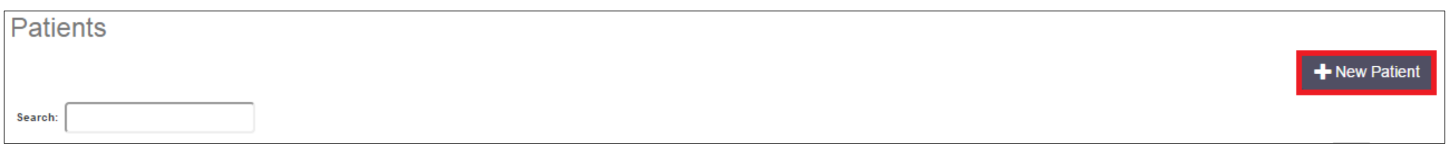
This tab may not be visible for your administrative role, see **User Roles** section for more details.

The **Patients** tab allows you to create a new Patient Chat as well as modify existing Patient Chats.

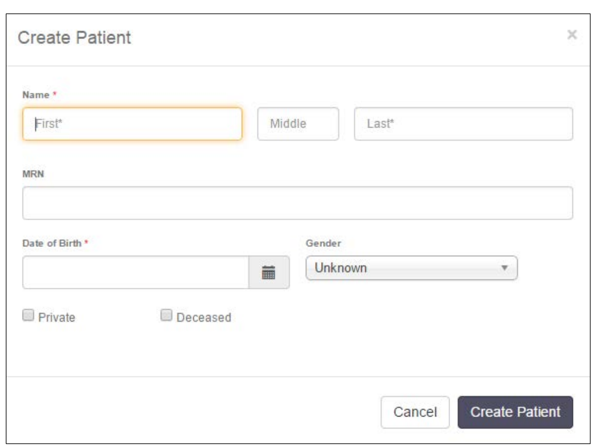


Create a New Patient Chat

To create a new Patient Chat, click on **New Patient**.

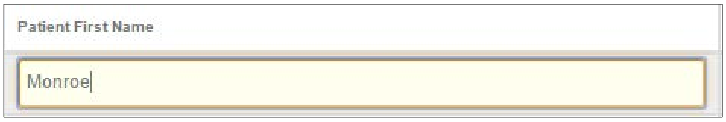


To create a new patient the required fields are First Name, Last Name and Date of Birth. Middle Name, MRN (Medical Record Number and Gender are optional. You can mark a patient as deceased as well as make a patient private so other users cannot search for this patient in the Backline.

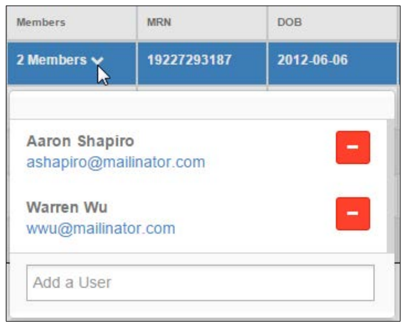


Modify an Existing Group

To modify the patients **First Name**, **Middle Name**, **Last Name**, **MRN**, **DOB** or **Gender** you click on the text box to enable the edit mode.



If you need to add or remove a user from a Patient Chat, select the dropdown in the **Members** column.



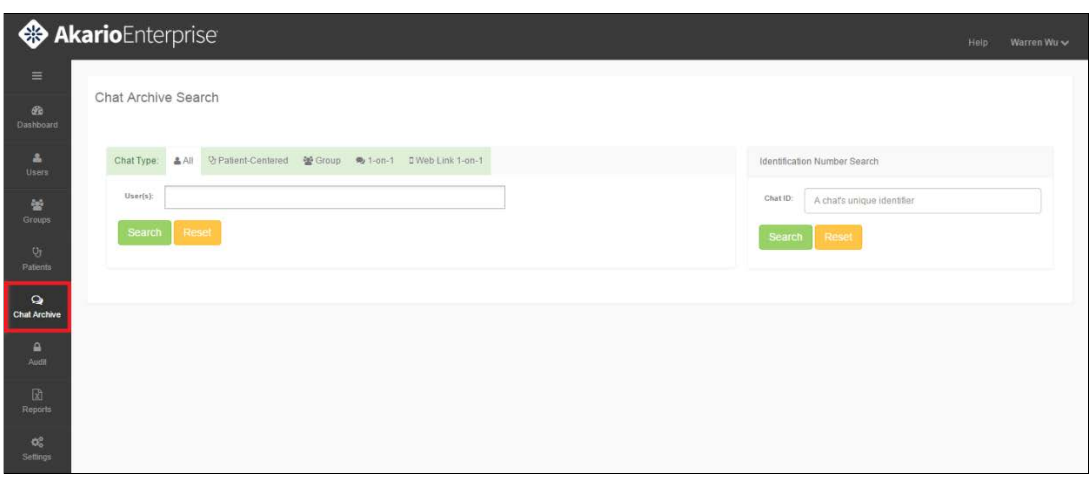
You can make a Patient Chat private by selecting the check box in the **Private** column. This patient will not show up in the patient search results.

If your organization has an ADT feed, patient information can only be changed through the Enterprise console. If there is any downtime with the ADT feed, patients can be added in manually through the Enterprise console.

Chat Archive

This tab may not be visible for your administrative role, see **User Roles** section for more details.

The **Chat Archive** tab allows the administrator to search the organization's message archive by Users, Patient, Group or Chat ID.



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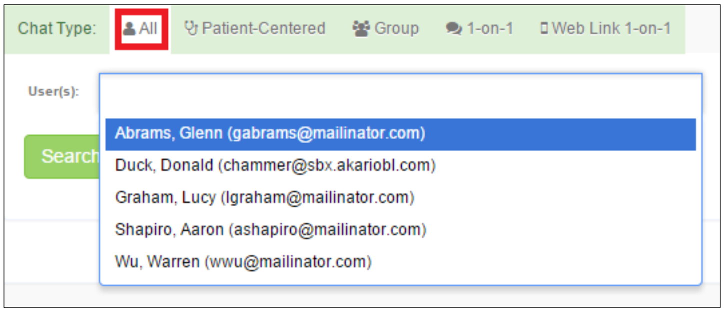
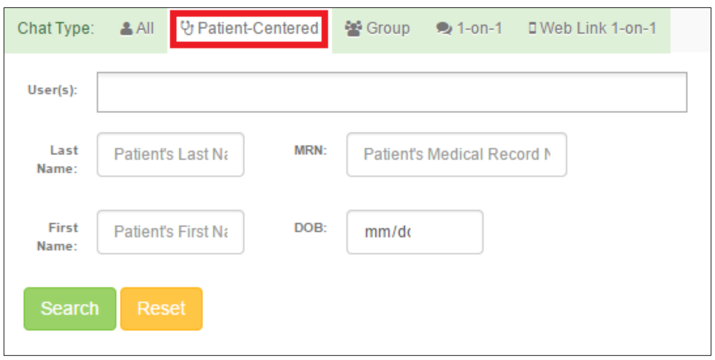
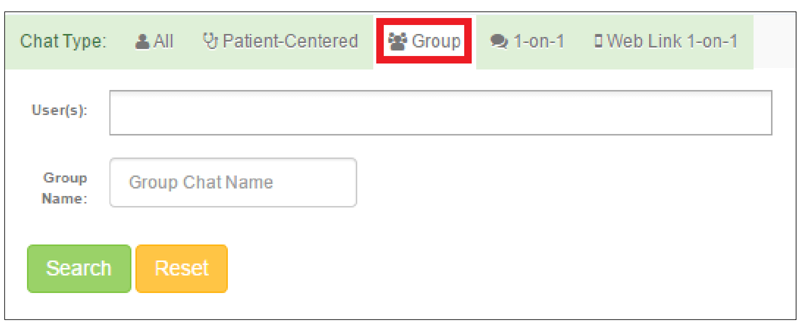
- **All** – When you click on the **User(s)** search field it will open a dropdown that shows users in the system to make it easy to select which users to search.



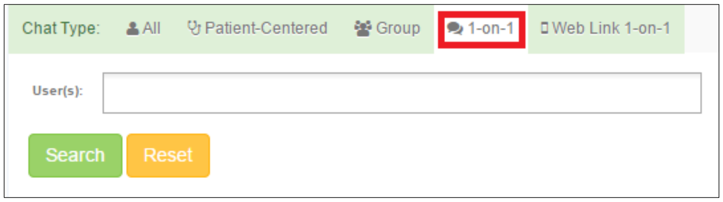
- **Patient-Centered** – You can search by User(s) to see what Patient Chats they are a part of or you can search by the patient's **Last Name**, **First Name**, **MRN (Medical Record Number)** or **DOB**.

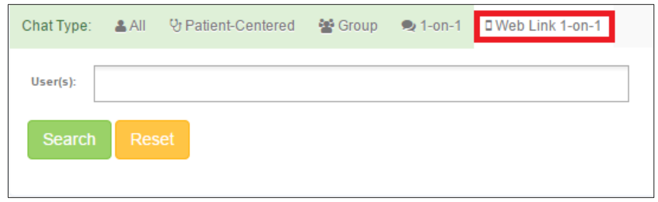


- **Group** – You can search by User(s) to see what Group Chats they are a part of or you can search by the Group Name.

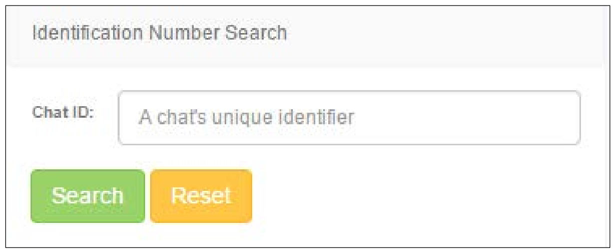


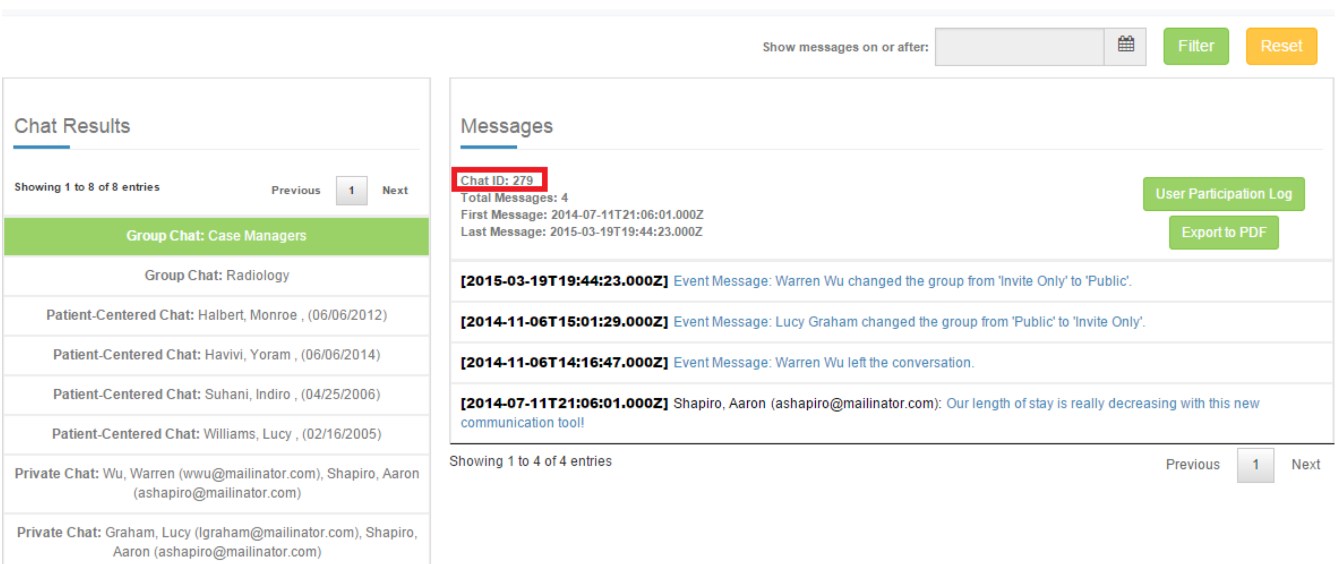
- **1-on-1** – You can search by User(s) to see what 1-on-1 chats they are part of.
- **Web Link 1-on-1** – If your organization is setup to allow Web Link 1-on-1 chats you can search by user to view the chats that they are part of.





- **Identification Number Search** – You can search by the Chat ID which is a unique identifier that displays when you view a Chat Archive. This starts from 1 and continues to increase based on the new chats created.





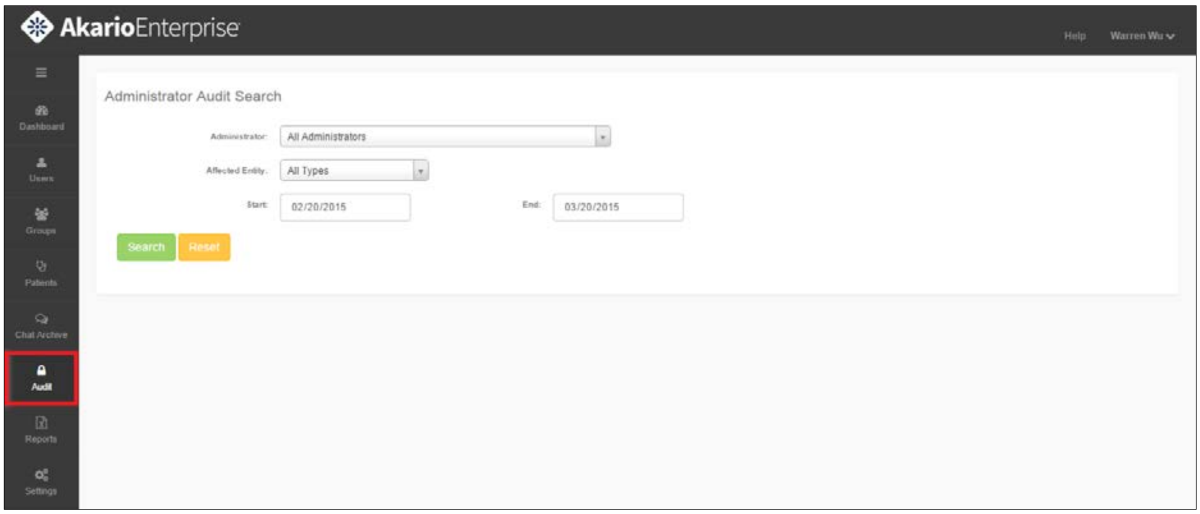
Whichever way you chose to search the Chat Archive, the results will appear in the same format as above. You will see all of the Chat Results on the left hand side with a viewable panel on the right where you can view that particular chat. The results show the most recent at the top. You can filter the results by date by using **Show messages on or after**. You can also view the **User Participation Log** or **Export to PDF**.

Please note that clicking on a chat in the left column, as well as exporting to a PDF, is logged in the Audit log.

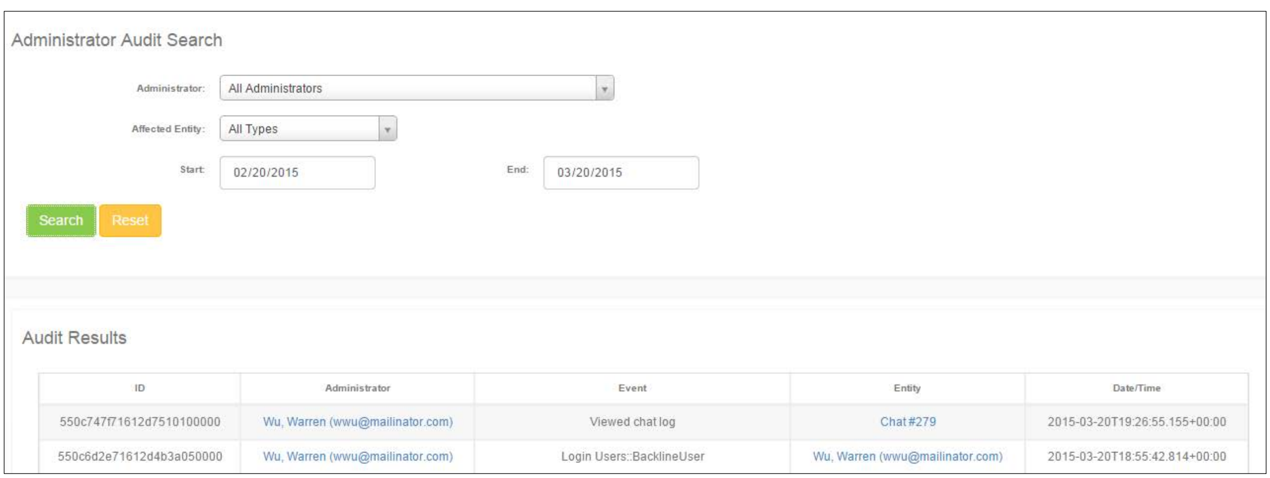
Audit

This tab may not be visible for your administrative role, see **User Roles** section for more details.

The **Audit** tab allows an administrator to see what other administrators (including themselves) have done in the Enterprise console. You can filter by the **Administrator**, **Affected Entity (Orgs, Users, Chat Archive, Logins)** and by a **Start/End** date.

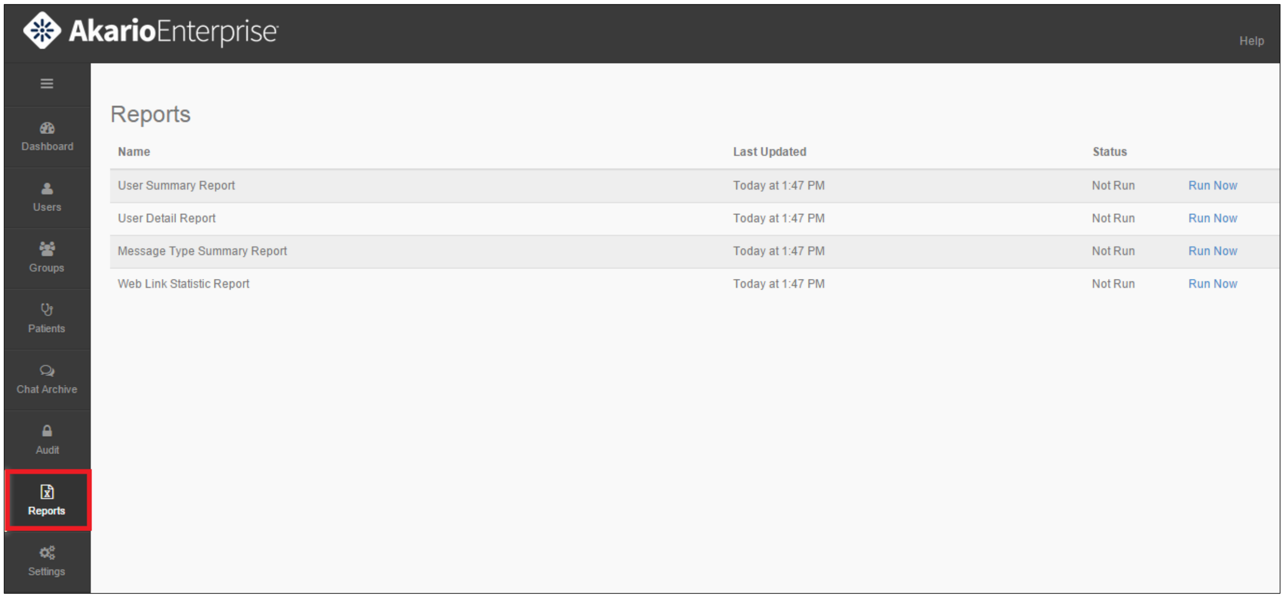


There are many benefits to this feature, including the ability to show who disabled/enabled a user, or who viewed a particular chat log.



Reports

Akario Enterprise allows you to run summary and detailed reports to gather comprehensive data on how Akario Backline is being used within your organization - down to the user level.

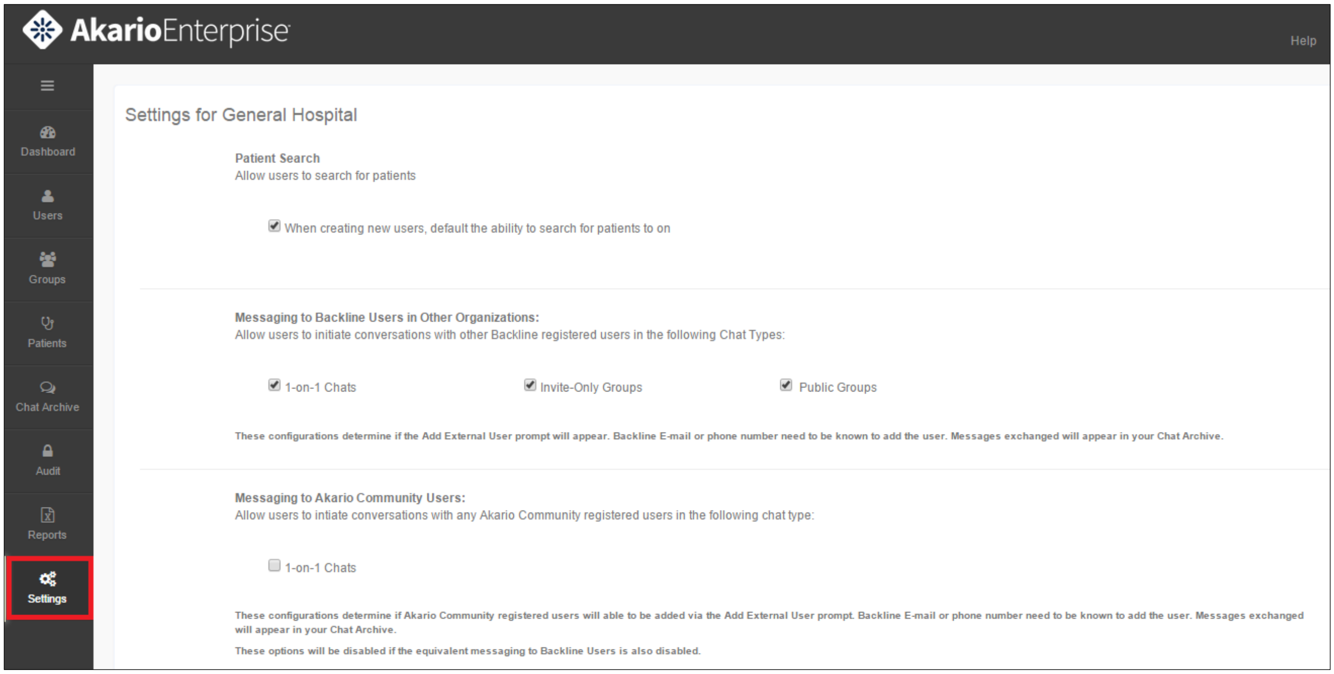


- **User Summary Report** – All active users within your organization, including the total number of messages sent and the last time the user sent and read a Backline message.
- **User Detail Report** – Chronological report with each user's message activity over time.
- **Message Type Summary Report** – Breakdown of message activity within your organization, detailing the number of chats by type (Groups vs. Patients) and the number of individual messages within those conversations.
- **Web Link Statistic Report** – Users who have sent messages to personal contacts outside of the organization, with information on which Backline registered users initiated the conversation and to whom.

Settings

Under the **Settings** tab in Akario Enterprise you are able to manage if users can:

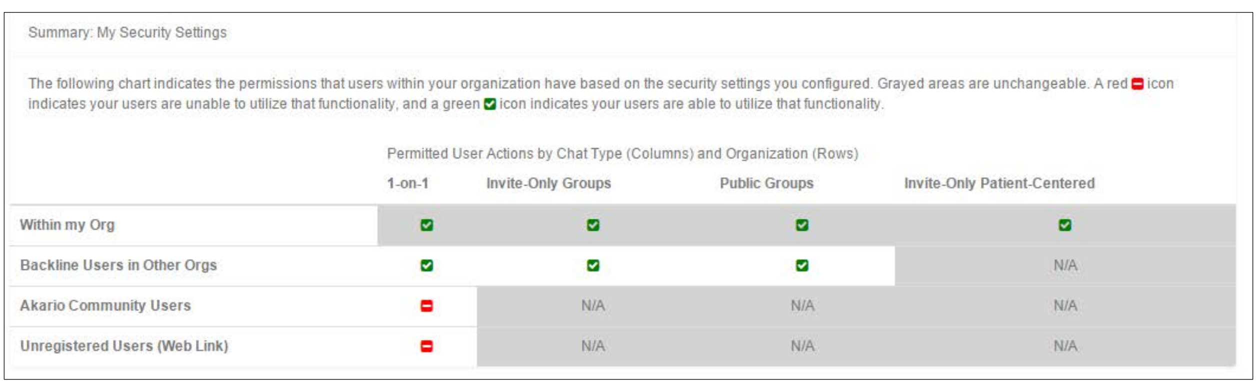
- Search for patients in your organization
- Communicate with other Backline and non-Backline users outside your organization



The specific Settings include:

- **Patient Search** – Allows you to set the default to allowing users to search for patients in the system.
- **Messaging to Backline Users in Other Organizations** – Allows you to determine if your organization can initiate conversations with other Enterprise Backline users through 1-on-1 Chats, Invite-Only Groups and Public Groups.
- **Messaging to Akario Community Users** – Allows you to determine if your organization will allow users to initiate conversations with any Akario Community registered users. An Akario Community user is someone who has downloaded the free application via an invitation from another Backline user.
- **Messaging to Unregistered Users** – Allows users to initiate secure Web Link conversations with non-registered users.

A summary of your organizations security settings will appear below to review and then click on **Save Settings**.



Summary: My Security Settings

The following chart indicates the permissions that users within your organization have based on the security settings you configured. Grayed areas are unchangeable. A red icon indicates your users are unable to utilize that functionality, and a green icon indicates your users are able to utilize that functionality.

Permitted User Actions by Chat Type (Columns) and Organization (Rows)

	1-on-1	Invite-Only Groups	Public Groups	Invite-Only Patient-Centered
Within my Org	✔	✔	✔	✔
Backline Users in Other Orgs	✔	✔	✔	N/A
Akario Community Users	⛔	N/A	N/A	N/A
Unregistered Users (Web Link)	⛔	N/A	N/A	N/A

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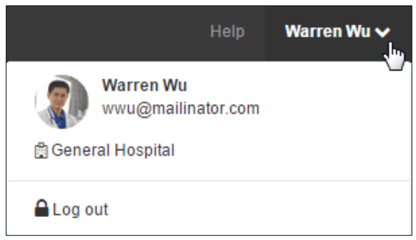
Help

The **Help** button on the top right will download the most up to date Akario Enterprise manual for the administrator to view.

Log Out

To **Log Out** of Akario Enterprise, click on your name at the top right and click on **Log out**.



With the same dropdown you can directly access your user profile by clicking on your name/email/avatar. To directly access the organization you can use this same dropdown and select the organization name.