AkarioBackline

Secure Messaging

User Manual

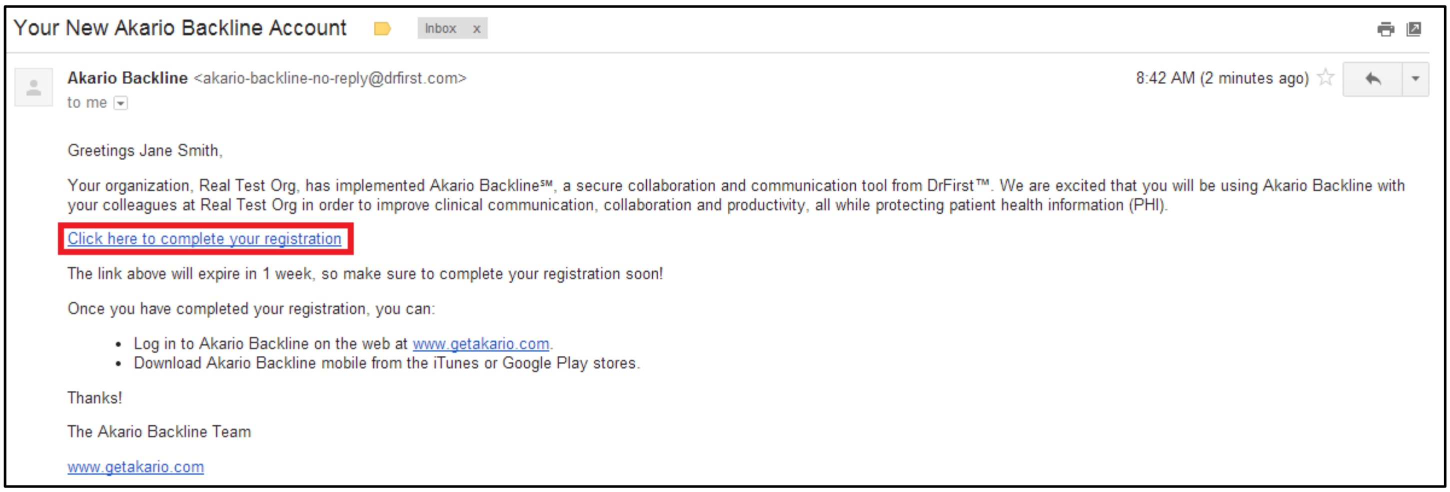
20150902

DrFirst

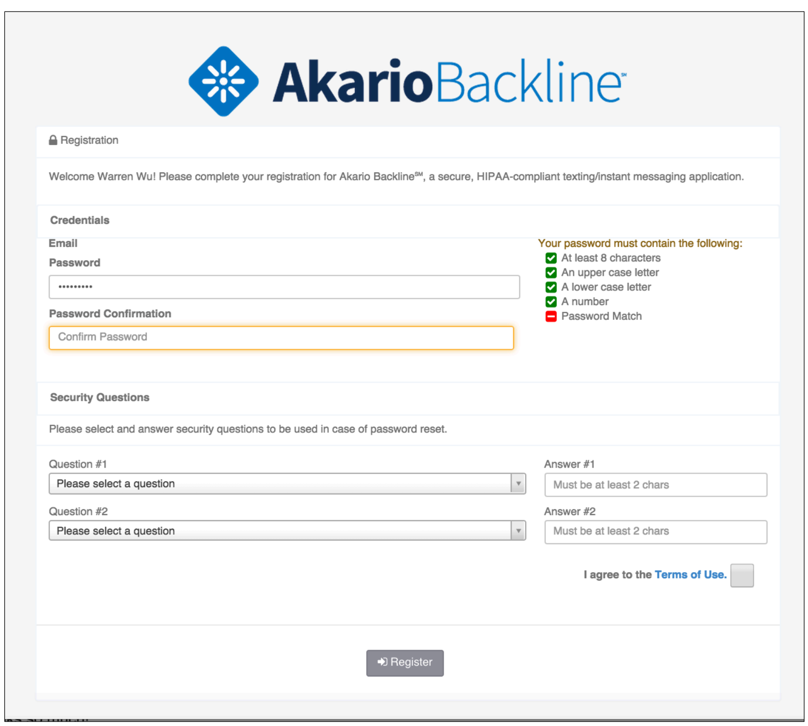
Contents

Managing your Akario Backline Account

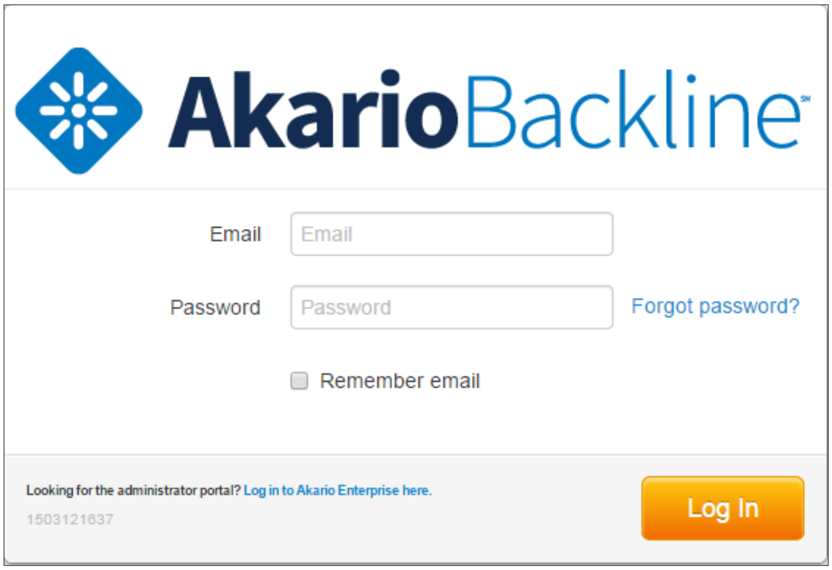
1. Once your administrator has created your Akario Backline account you will receive an email providing you the link to register your account. The registration link is available for one week before it expires. If your link has expired, please contact your administrator.



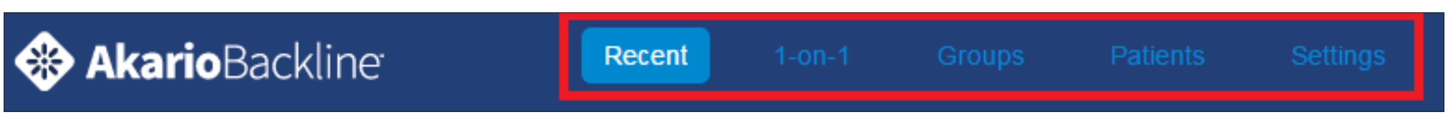
2. When you click on the registration link you are brought to the Akario Backline registration screen in which you will create your password, answer 3 security questions to be used in case of password reset, and accept the Terms of Use. To view the Terms of Use, click on **Terms of Use** and another window will open and display them for you to review.



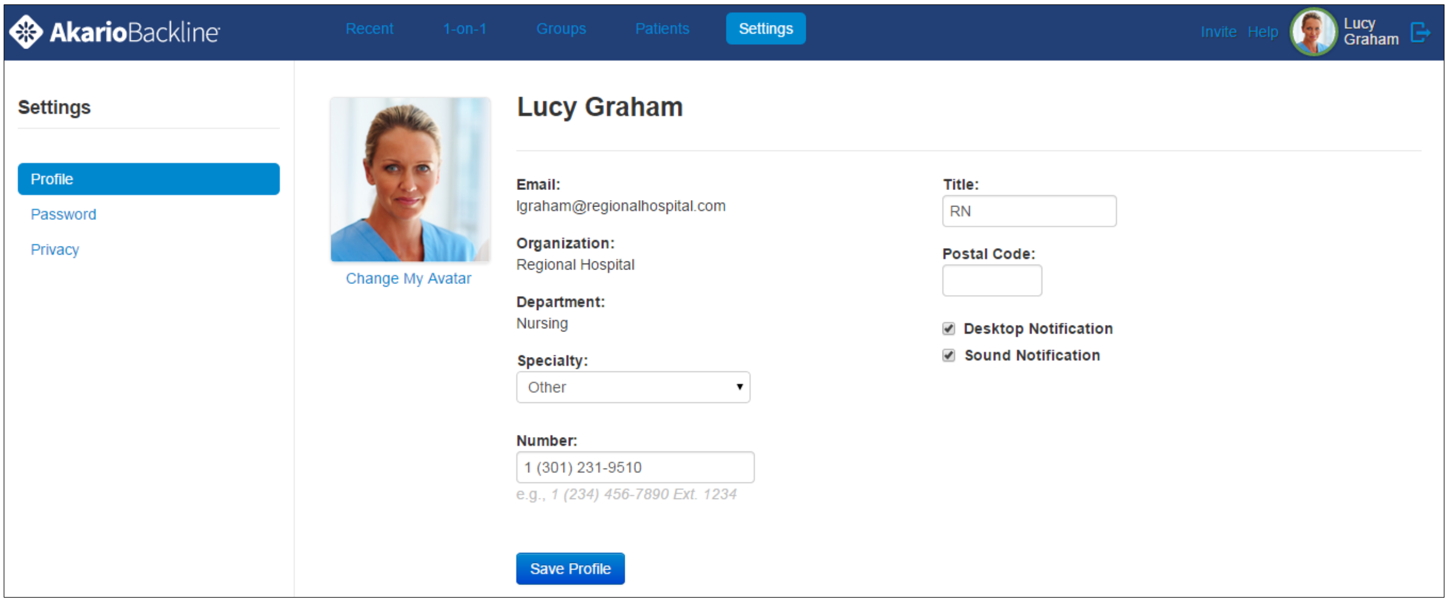
3. If you forget your password, click on the **Forgot password?** link, input your email address and you will receive an email to reset your password.



4. Once logged in, you will notice 5 tabs at the top:
    a. Recent
    b. 1-on-1
    c. Groups
    d. Patients
    e. Settings



5. When you first log in, click **Settings** or on the top left click on your avatar to update your personal information. This gives you the ability to update your specialty, title, zip code and phone number. This is where you can also choose to receive desktop notifications and sound notifications. Desktop notifications work with the Google Chrome and Firefox browser. You can also choose to upload an avatar which will appear during chat sessions. Once you have completed entering your information, click **Save Profile** at the bottom of the page.



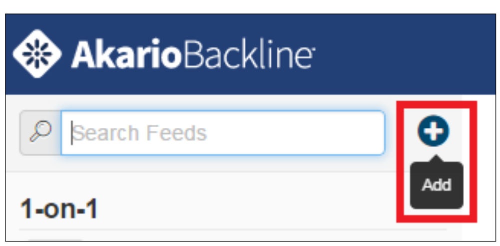
6. Under Settings you have the ability to change your password. Click on **Password** on the left hand side of the page and enter your old and new password. As noted, your password must be between 8 and 15 characters long and contain at least one upper case letter, lower case letter and number.
7. Under Settings you can modify your **Privacy** settings. You can modify your searchability by members of your organization or all members of Backline. You can also modify who has the ability to view your email and phone number.

Recent

If this is not your first time logging into Backline you will be able to find your recent Backline conversations by clicking on **Recent** in the top toolbar. You can view your recent 1-on-1, Group and Patient chats in one centralized location. You can use the **Search Feeds** search bar to narrow down the results displayed.

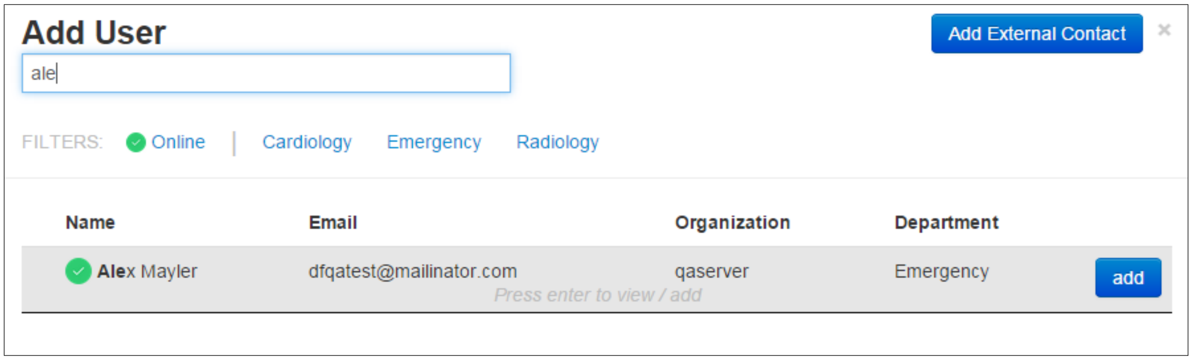
1-on-1 Chats

1. To begin a 1-on-1 chat with a contact within your organization, click on **1-on-1** in the top toolbar.
2. In order to begin a conversation, click the **+** button next to the right of the search field.



3. You can filter users by their name (first name, last name or first few letters), email, organization or department. You can also use the filter buttons to quickly filter by online users or by department.

You can view if a contact is online, idle or offline based on the icon next to their name. A green check mark (or mobile icon if they are on their mobile device) means they are online, a grey check means they have been idle, and a grey "x" means they are offline.

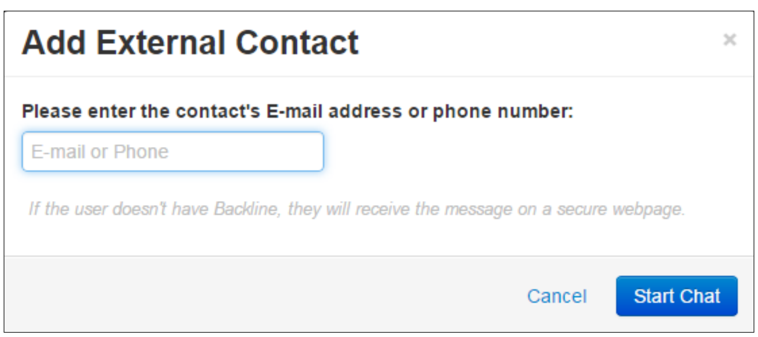


4. Click on **Add** to begin a conversation with a new user. This will take you directly into the chat screen for this user. If the contact has **View** it means you have already connected with this user and clicking **View** will take you into your existing conversation.

Communicating with Individuals Outside your Organization

In Akario Backline you have the ability to connect and chat with other Backline users outside of your organization if your organization permits.

1. When on the **Add User** screen, you will see users in your organization as well as users who have decided to be searchable within the Backline community.
2. If the person you would like to communicate securely with is not in this list, you can click on the 'Add External Contact' button. You will be asked to input their email or phone number.
    a. If the contact is using Backline at another organization, they will receive the message via Backline notification.
    b. If the contact does not have Backline, they will receive either a notification via SMS or email and be brought to a secure chat webpage where they can send and receive messages with you.

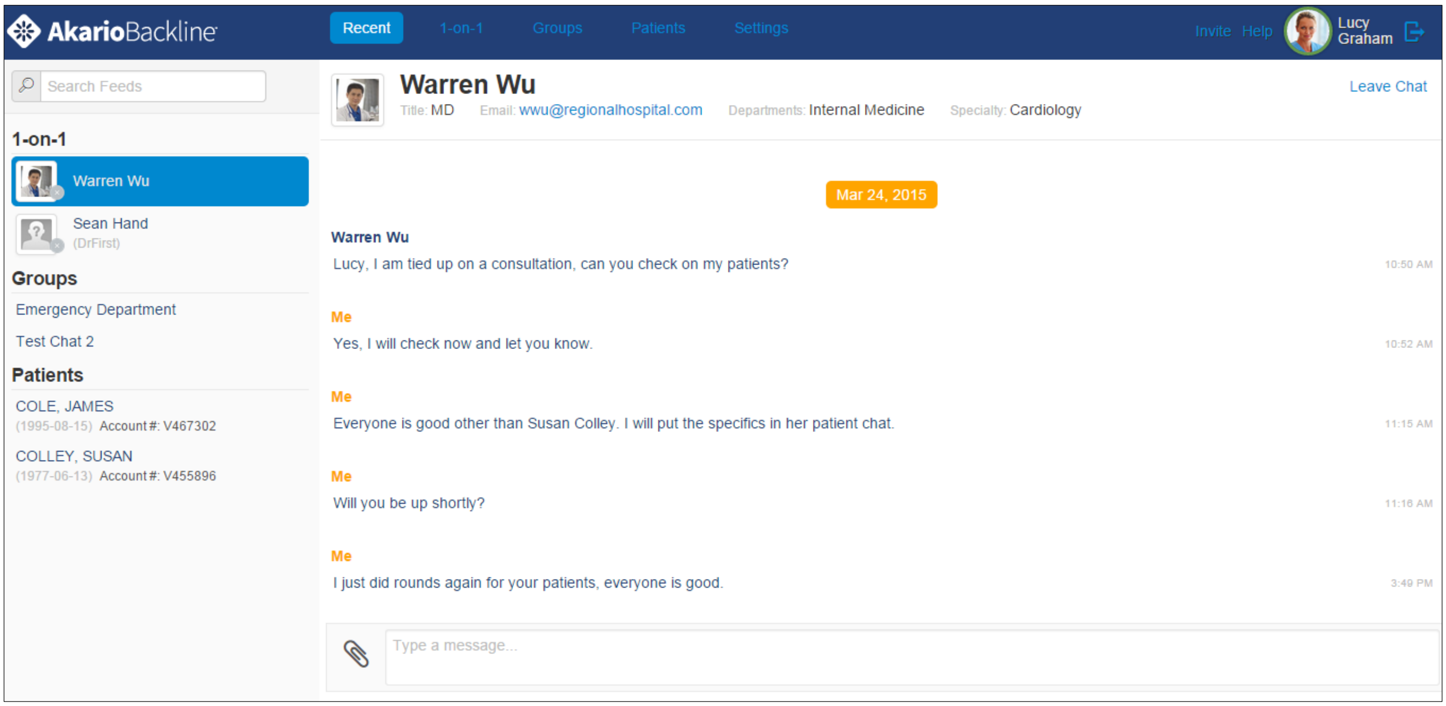


3. If the user is a member of another organization, their organization name will appear below their name to help separate your internal and external contacts.

Sending Secure Messages

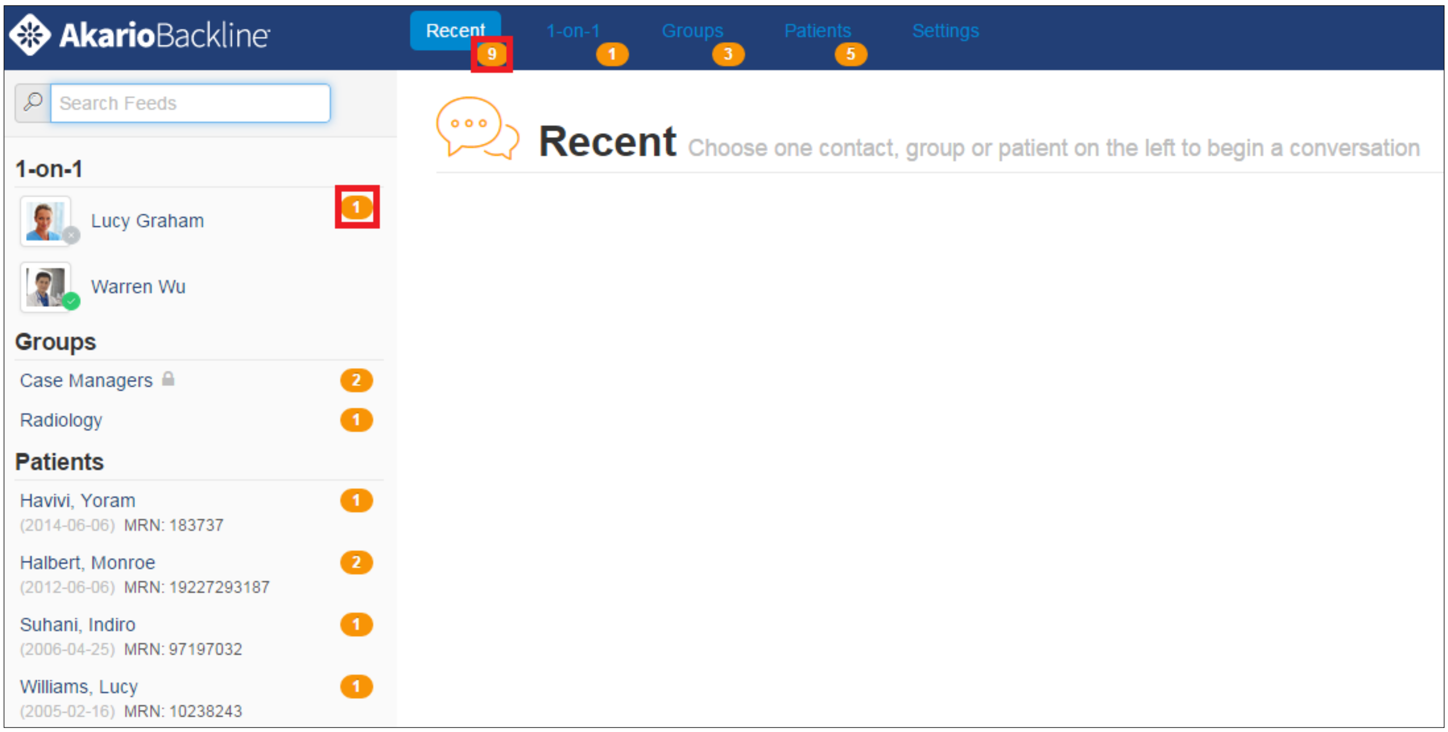
Once you started a new conversation with a user, you can send messages to both users that are online and offline – users that are offline will receive the message when they log in. To send a secure message:

1. Click on the name of a contact, group or patient. If you have a large list of contacts you can use the search field to filter the results.
2. Type your message at the bottom of the screen and hit enter on your keyboard to send.
3. If you would like to attach a picture, video or audio to your 1-on-1 chat, click the paper clip at the bottom left-hand corner of the page. You have the ability to attach a file up to 20 MB in size.



When sending a chat, you will be able to see if the message is unread or if it has been read with a date and timestamp. If the message is unread you will see an orange **unread** badge. If the message has been read you will see the time it was sent and if you hover over the time it will display that it was read and will show the date and time stamp.

You will receive numeric notifications next to a contact's name letting you know that you have new messages from them that you have not read along with a badge notification in the toolbar under **1-on-1** and **Recent** our web browser will also show you alternating text on the tab to indicate that have received a new message. You will also receive a sound notification that you received a new message if you have it selected in your settings. If you are using Google Chrome or Firefox, and in your settings have selected to receive desktop notifications. you will also have a notification appear on your desktop.



If you have logged out of Backline and log back in, you have the ability to view your previous chat history with a particular contact. When you click on the contact's name you can scroll to view the message history.

When you are in a 1-on-1 chat, you have the ability to view the contact's name, title, department and email and phone if the user has chosen to share that information. If you click on the contact's email it will open up an email to compose and if you click on their phone number it will launch an application on your computer to make a phone call.

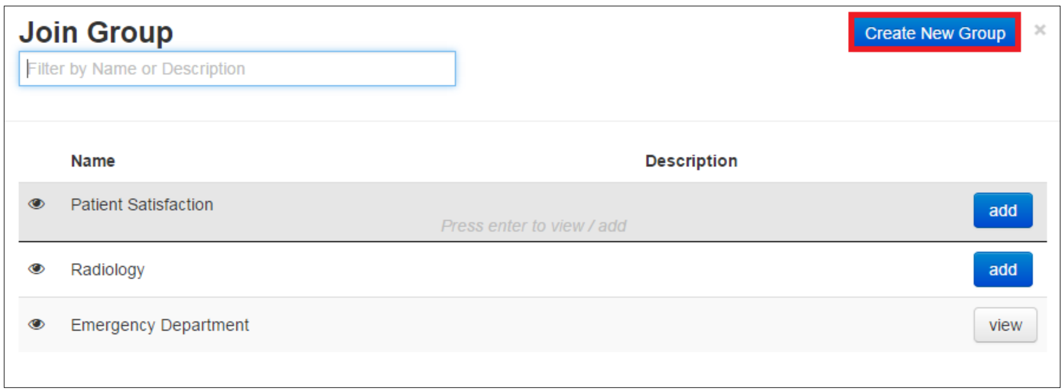
If you no longer want to chat with the user you can click **Leave Chat** on the top right and the chat will be removed from your 1-on-1 and recent chats.

Managing Groups

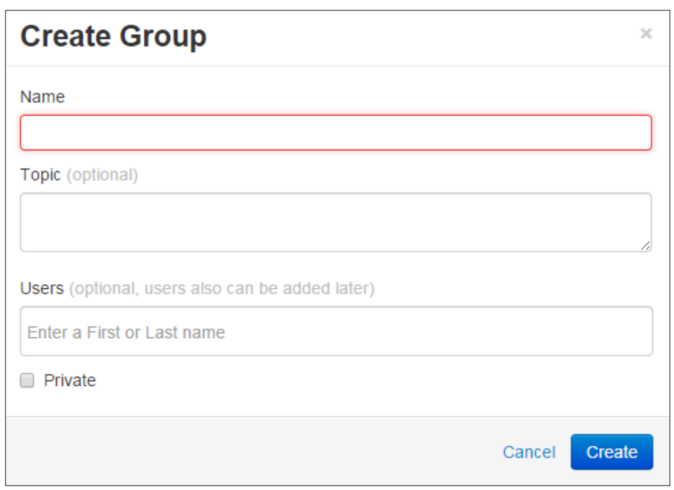
Groups can be created to form a discussion with multiple contacts and with contacts outside of your organization.

Creating a Group Chat

1. Select **Groups** at the top of the screen.
2. Click the **+** button to the right of the search field.
3. Click on the **Create New Group** button.



4. Enter in the group Name and Topic (optional). You can click on either **Create** or you can add users at the same time as you are creating the group. If you do not add group members at this time you can do so once the group is created. You also can make the group chat private, i.e. non-searchable, by checking off the **Private** box.



Search Group Chats

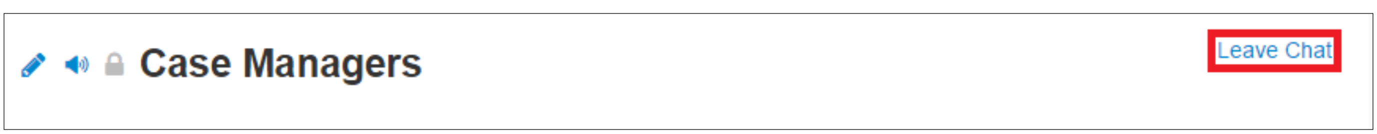
1. Select **Groups** at the top of the screen.
2. Click the **+** button to the right of the search field.
3. Below **Join Group**, enter the name of the existing discussion or description in the search field.
4. Click **Add** to the right of the name of the group. If you are already a part of the group chat you can click **View.**
5. When searching from a group chat you can click on the eye icon to view who is currently a part of the discussion and if they are online.

Once a group is established, all members of the group can view your messages within that discussion. When you join, leave, or add new members to the discussion a notification will appear in the discussion. Offline members can also see your messages in the group conversation when they log in.

As a group member, you can:

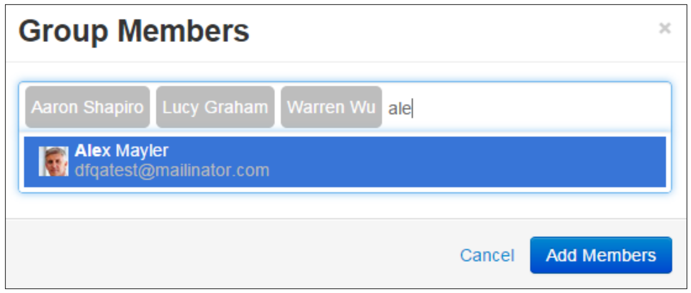
1. Post messages to be seen by other group members. You can view how many members of the Group Chat have viewed a particular message sent within the discussion. When you hover over the viewed message count it will display **Viewed by** with a date/time stamp.

2. Send attachments to be seen by other group members.
3. Modify the name or topic of the discussion group.
4. You can turn sound notifications on or off from within the group chat.
5. Remove yourself from a group by clicking the **Leave Chat** button on the top right.



6. Add other users to join the group.
   a. Under **Members** within the discussion click on the **+ symbol** to browse contacts and choose which contacts to invite. You can invite external contacts even if you are not currently connected with them through a 1-on-1.

b. To add a contact type in their name or scroll down and select them from the dropdown list that appears. When you are finished adding members click **Add Members**, and you will now see the members that you have added under the **Members** section of the discussion.



Under the members list you can hover over any of the contacts to view additional information including their organization, email and department.

If you want to leave a group chat, click on **Leave Chat** within the group discussion page. This will remove it from your active list but you can still re-join if the group is Public.

When you are a part of a group chat, on the left under **Groups**, all of your current group chats will appear.

If you are a part of a group chat that has external contacts a globe icon will appear next to the discussion group name. If an external contact is a part of the discussion, under the members list the name of their organization will appear below their name.

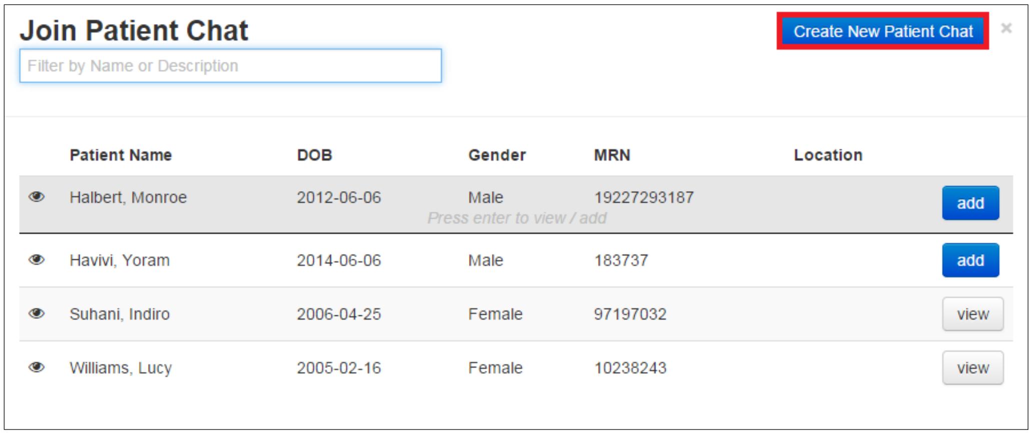
If you are a part of a group chat that is private a lock icon will appear next to the discussion group name. This means other users cannot search for this group discussion, they can only be added by a member of the group.

Managing Patient Centered Chats

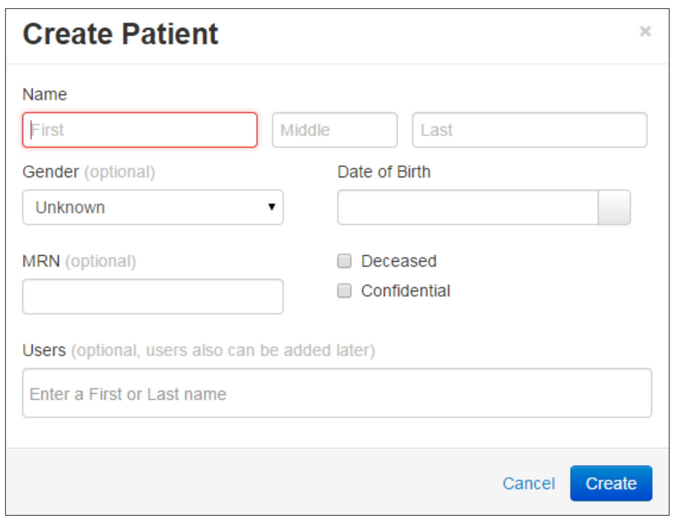
Patient Centered Chat is a section of Akario Backline in which you can have a conversation regarding a specific patient.

Creating a Patient Chat

1. Select **Patients** at the top of the screen.
2. Click the **+** button to the right of the search field.
3. Click on **Create New Patient** on the far right.



4. To create a patient you will need to enter in the patient's First Name, Last Name and Date of Birth. Middle Name, Gender, MRN (Medical Record Number), Confidential and Deceased are optional. You can click **Create** or you can add members to the patient chat first.

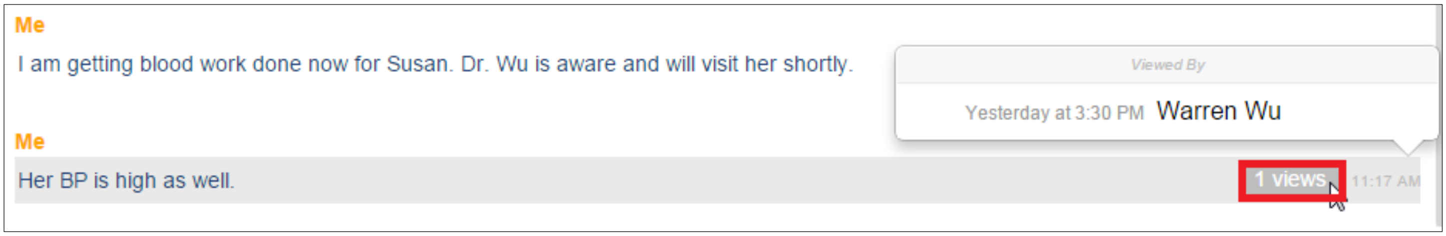


5. When adding in members while creating a patient or afterwards, type in the users name or scroll down and select the contacts to add and click **Create**.

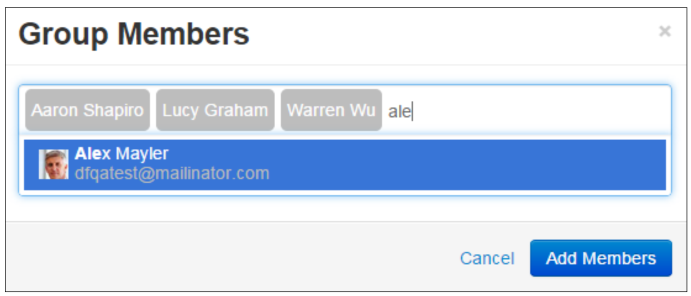
Search Patient Chats

1. Select **Patients** at the top of the screen.
2. Click the **+** button to the right of the search field.
3. Type in the patients name (partial or full, first or last name) or Description (MRN) in the search field.
4. On the search results page you can:
    a. Click **Add** on the right on the patient's name to join the existing patient chat.
    b. If you are already a part of the patient chat it will display **View**.

Once you either create a patient chat or join one, you can now message other members of the patient chat the same way you chat with contacts and groups. You can chat, view chat history and upload files. You can view how many members of the Patient Chat have viewed a particular message sent within the discussion. When you hover over the viewed message count it will display **Viewed by** with a date/time stamp.



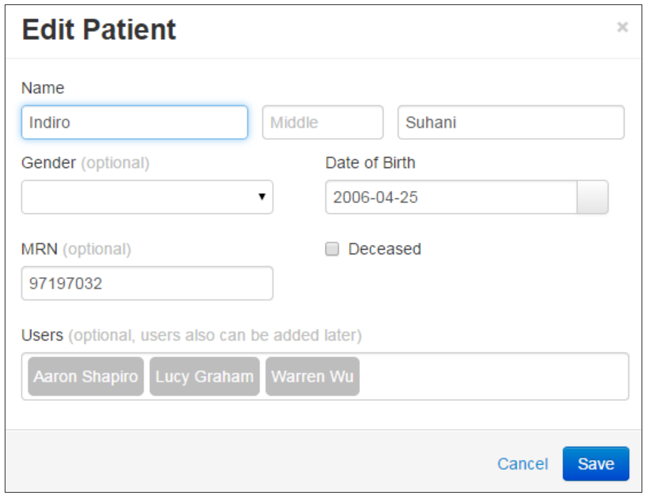
Once you are part of a patient chat you can invite other contacts to join. On the top right click on **+ icon** in the members section. You can search the list of organization contacts or filter the results. To add the member to the patient chat, click on their name and click **Add Members**. You cannot add external contacts to a patient chat.



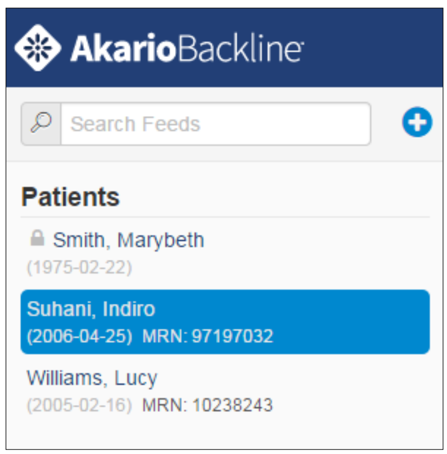
When in a patient chat, at the top you can view their demographics (Name, Gender, Date of Birth, MRN (Medical Record Number)). If you click on the edit button next to the patients name you can modify the patient's demographics. On the **Edit Patient** screen you can mark a patient as deceased. If the patient was made confidential this cannot be reversed as they will always remain a confidential chat, unless you ask an Akario Backline administrator to change it.   You can turn sound notifications on or off from within the patient chat.

Under the members list you can hover over any of the contacts to view additional information including their organization, email and department.

If you want to leave a patient chat, click on **Leave Chat** within the patient chat page. This will remove it from your active list.



When you are a part of a patient chat, on the left under **Patients**, all of your patients will appear.



If you are a part of a patient chat that is confidential a lock icon will appear next to the patient's name. This means other users cannot search for this patient chat, they can only be added by a member of the group.

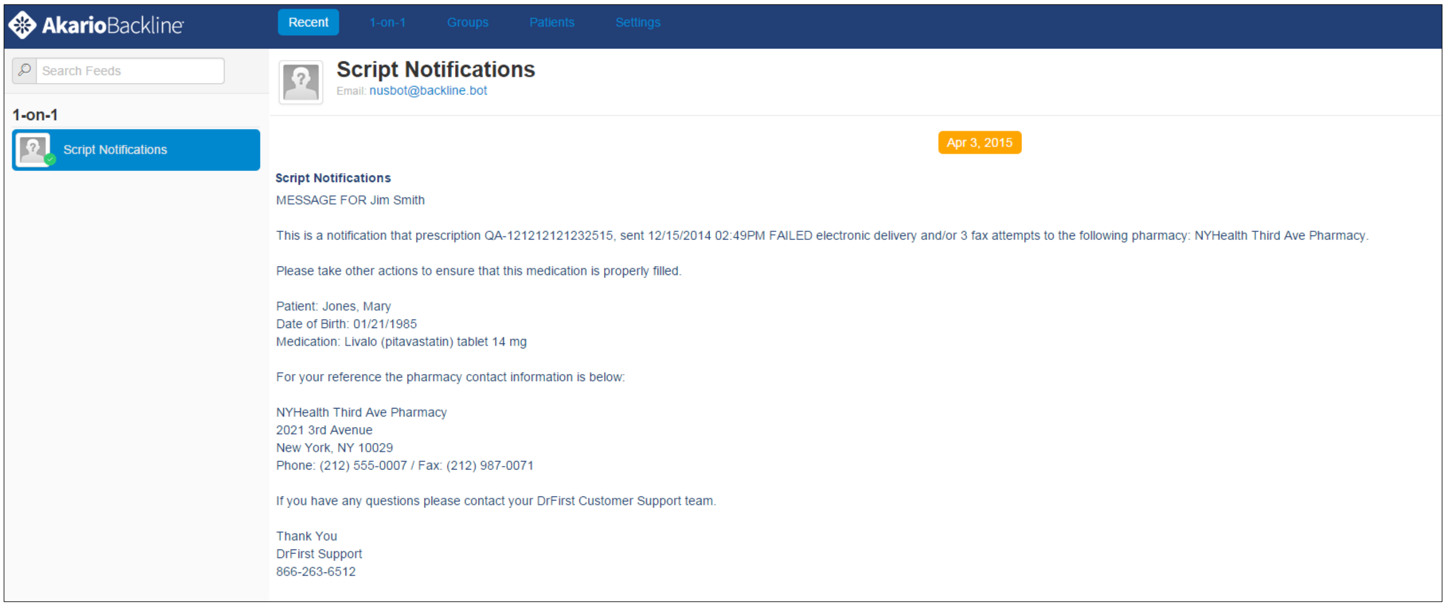
Features with ADT Feed

With an ADT feed you will not add new patients or have the ability to edit a patient's demographic information. You will use the search field to find the patient you are looking for and join the patient chat. If a patient chat should be made confidential that can be done by an administrator through the Akario Enterprise console.

With an ADT feed you can view the account #, inpatient/outpatient status, and location of the patient. You can also view the **Last Event**. Any change in status from an ADT message will be visible as a chat entry enclosed in a grey box.

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.



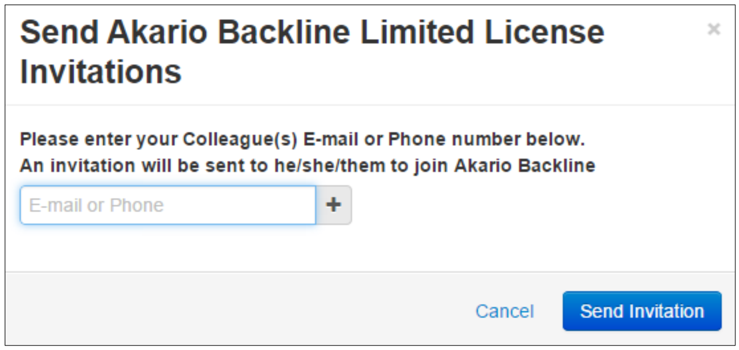
Prescribing providers will receive a secure automated message through Akario Backline at the time the first fax for a prescription fails to reach the pharmacy. The NUS message includes prescription details, information about how to resend the prescription and the pharmacy's contact information.

To setup your account for NUS please contact your administrator.

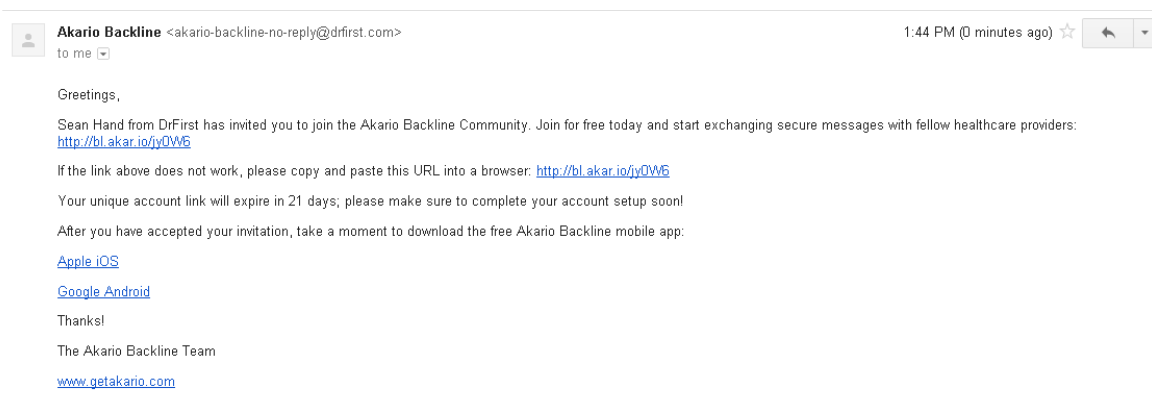
Invite Colleague to Download Akario Backline

To invite a colleague to download Akario Backline, click on **Invite** on the top right of the screen.

You will need to input your colleague(s) E-mail or Phone number and they will receive an invitation to join the Akario Backline Community. You will be able to interact with them through 1-on-1, Group and Patient chats.



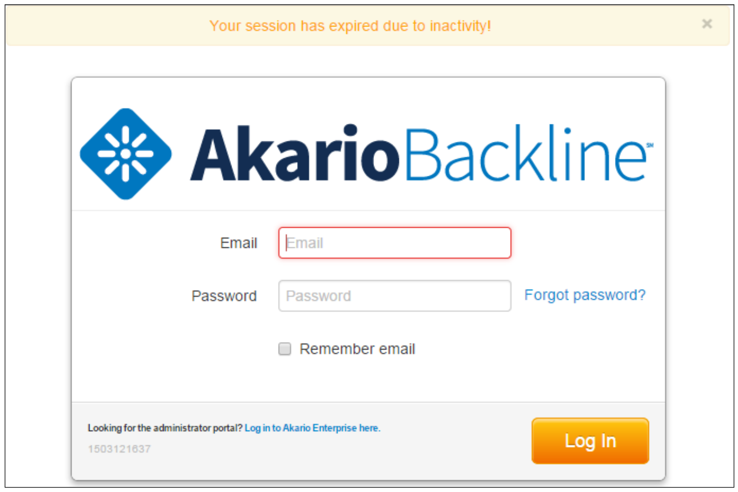
Your colleague will receive an email to join the Akario Backline Community, as seen below. The user will want to click on the link to setup their account.



Once the user clicks on the link, they will be taken to a 'Get Started' Screen in which they will complete their registration by setting up their password and security questions.

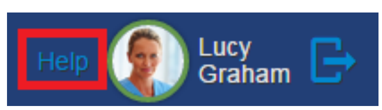
Timeout of Backline

If you have been idle from the system for 15 minutes, you will be taken back to the login screen to re-sign in.

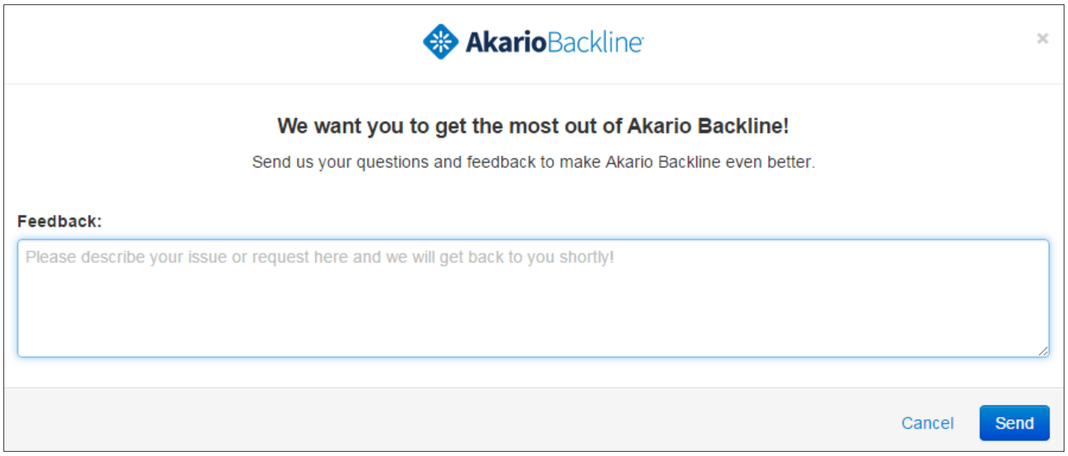


Help/Submit Feedback

For help or to submit feedback, click on the **Help** link at the top right of the screen.



The page you are directed to allows you to submit questions and feedback.



Log Out

To logout of the system simply click on the **door** icon on the top right of the screen.   This will redirect you to the login page.