

OVERVIEW

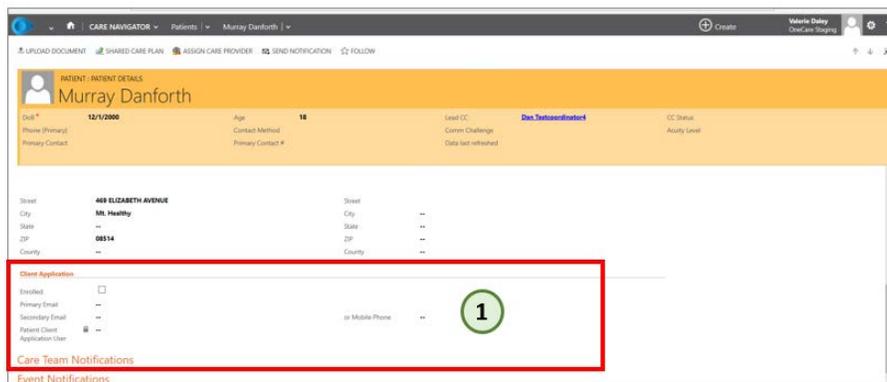
The purpose of this document is to provide instructions on how to provision patients with access to Care Navigator. The provisioning process may be achieved from the Hub or Client Application.

STEP ONE: FIRST STEPS TO PROVISION A PATIENT

1. The patient can ***only be provisioned in person***. This can occur in the patient's home or in an office setting.
2. Ensure the patient meets the eligibility requirements:
 - Must be 18 years or older
 - Have an email address
 - Have a mobile phone number (able to receive text messages) OR secondary email address
 - A form of personal identification (License, Passport, etc.)
3. Open Care Navigator to the patient's home page.
4. Request patient to verbally state their full legal name and date of birth.
 - Confirm this information against Care Navigator Information
 - If legal name and/or date of birth does not match call the OneCare Helpdesk at 802-847-7220 option 2.
5. Validate government issued personal form of identification and input last 4 digits of the document number in the patient ID field.
6. Follow technical instruction below for next steps (select Hub or Client Application for provisioning).

STEP TWO: PROVISIONING PATIENT ACCESS – HUB (WEBSITE)

1. Open the patient record for whom you would like to grant access. A New section '**Client Application**' has been added to the bottom of the Patient Information section of the record. *Note: If the patient has not yet been provisioned, the fields in this section will be blank.*



The screenshot shows the patient record for Murray Danforth. The 'Client Application' section is highlighted with a red box and a green circle containing the number 1. The section includes the following fields:

- Enrolled:
- Primary Email: --
- Secondary Email: --
- Patient Class: --
- Application User: --

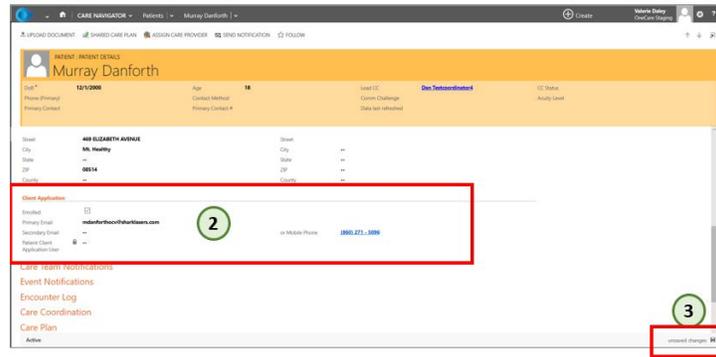
Below the 'Client Application' section, there are links for 'Care Team Notifications' and 'Event Notifications'.

2. The fields necessary to provide access are:
 - a. **Primary Email:** It must be a unique email per user. The Hub will alert with an error message if the same email ID is used for another patient.
 - b. **Secondary Email OR Mobile Phone:**
 - If the user selects a secondary email address, they will receive their secondary authorization PIN to this email address.

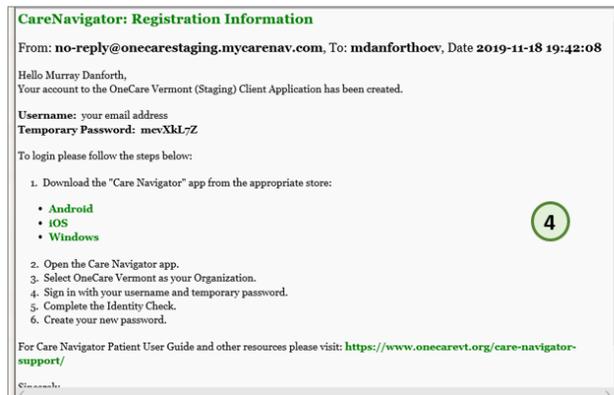
- If the user selects a mobile phone number, they will receive a text message with their secondary authorization PIN to this phone number.
- If the user adds both, a mobile phone number AND secondary email address, the patient will have the option (during their activation process) to select the method in which they want to receive their secondary authorization PIN to this phone number.

c. **Enabled:** Check box must be checked off when you wish to initiate the email to the patient.

3. Save the changes to the patient record to trigger the creation of the Client Application user and send the patient their enrollment email to their Primary Email address.



4. The patient will receive their enrollment email to their Primary Email address. The patient can now proceed with the activation process.



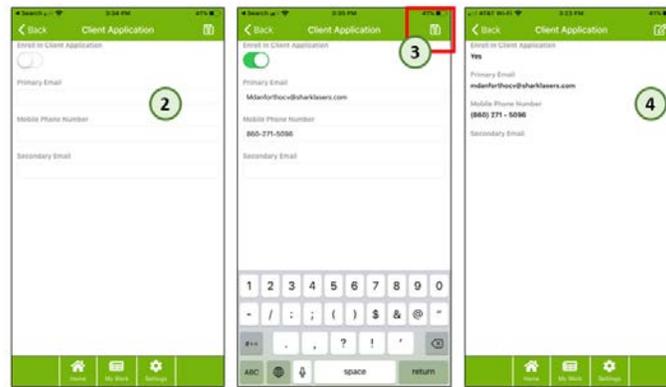
STEP THREE: PROVISIONING PATIENT ACCESS – CLIENT APPLICATION (PHONE APP)

To provision a patient for access to the Client Application, open the patient record.

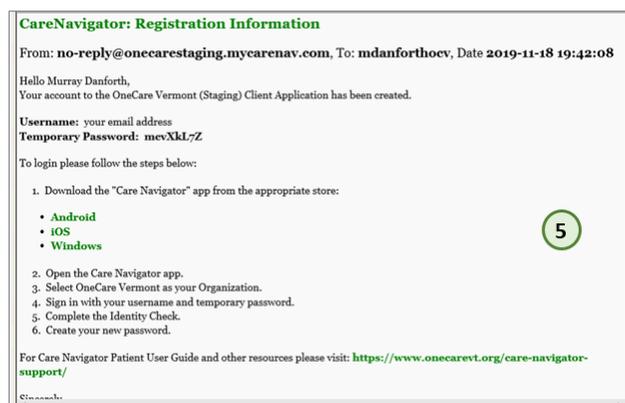
1. From the **'Patient Menu'**, select the option for **'Client App'**



2. The fields necessary to provide access are:



- a. **Primary Email:** This should be the patients' main email address. It must be a unique email per user. The Hub will alert with an error message if the same email is used for another patient.
 - b. **Secondary Email OR Mobile Phone:**
 - If the user selects a secondary email address, they will receive their secondary authorization PIN to this email address.
 - If the user selects a mobile phone number, they will receive a text message with their secondary authorization PIN to this phone number. *Make sure this is a mobile phone number that can receive text messages.*
 - If the user adds both, a mobile phone number AND secondary email address, the patient will have the option to select the method in which they want to receive their secondary authorization PIN to this phone number.
 - c. **Enroll in Client Application:** Slide the button to the right to enable the patient access. It must be Green (to the right) when you wish to initiate the email to the patient.
3. Save the changes to the patient record to trigger the creation of the Client Application user and send the patient their enrollment email to their Primary Email address.
4. The completed form will display for any patient where access has already been granted. Users may view the identified email(s) and/or phone number where the invitation and PIN will be delivered.



STEP FOUR: PROVISIONING PATIENT ACCESS – TROUBLESHOOTING

If the patient does not receive their enrollment email, review these troubleshooting tips:

- **The patient doesn't receive the enrollment email:** Check that the email address was entered correctly. Advise patient to check their Junk or Spam folders. If the email address is incorrect, contact OneCare admin to update the primary email address.

- **The patient doesn't receive the PIN to their secondary email:** Check that the email address was entered correctly. Advise patient to check their Junk or Spam folders. If the email address is incorrect, then the user can update it in the patient record.
- **The patient doesn't receive the enrollment text message:** Check the phone number was entered correctly AND that it is a mobile device that is capable of accepting text messages. If the phone number is incorrect, then the user can update it in the patient record.
- **The patient can no longer access their record:** When a patient is inactivated in Care Navigator Hub, their Client Application record will also be inactivated and can no longer view their own information.
- **I get an error saying the Primary Email address is already being used by another user:** The Client Application User Name is the primary email address for the user/patient. If the email address already exists for another user, an error will present and indicate to enter a different email address.

STEP FIVE: VIEW OF PATIENTS WITH CLIENT APPLICATION ACCESS

Users may easily view if a patient has Client Application access by opening the Active Patients view in the Hub. A new column has been created **'Enrolled in Client Application'**.

- **Yes:** Indicates the check box for 'Enrolled' is checked
- **No:** Indicates the patient had been a Client Application user at one point, but currently is not (*the check box for 'Enrolled' not checked*)
- **Blank:** Indicates the patient has never been set up to be a Client Application user.

For System Admin Users:

A list of all Patients with access to the Client App can be found in the **Client App User** screen.

1. **Admin Users** go to the Settings Menu option in the Hub and select **Client Application Users** button from the top Ribbon Menu.
2. Change the view to **Client Application Users (Patient)**

System Views	Logon Email	Mobile Phone Number	Secondary Email Address	Activate	Terms of Use Ac...	Created On
Client Application Users (Patient)	amandaburiett@gmail.com		newemail2@okay.com	Yes	No	11/29/2018 1:09 AM
Create Personal View	jburris6@gmail.com	(513) 693 - 5550		Yes	Yes	12/12/2018 11:18 AM
Save Filters as New View	amanda.aube@onecarev...	(513) 693 - 5550		Yes	Yes	12/6/2018 4:44 PM
Save Filters to Current View	p.bjvani@gmail.com		bjvani@gmail.com	Yes	Yes	3/15/2019 2:55 PM
Amanda Buriett	amandaburiett@gmail.com			Yes	Yes	11/29/2018 1:09 AM
Andrew Kachelmeier	akachelmeier@gmail.com	937-231-9056	syntaxunknown@outlook...	Yes	Yes	9/10/2018 9:03 PM
Andy Kachelmeier	akachelmeier@intrapriseh...	937-231-9056	syntaxunknown@outlook...	Yes	Yes	9/9/2018 11:20 AM
auser auser1	abc@email.com	(111) 123 - 1234		No	No	12/14/2018 3:25 PM
Care Coordinator1	OCV.CareCoordinator@gm...	(413) 426 - 6145		Yes	No	12/6/2018 12:10 PM