Getting Started with ViewMyConsult patient portal

- 2 Before you Register for ViewMyConsult (VMC)
- 3 Setting up Employee Privileges in ViewMyConsult
- 4 Descriptions of Employee Privileges in ViewMyConsult
- 5 Scenarios to consider when setting up Employee Privileges
- 6 Setting up Delegations
- 7 Setting up Patient Home Page
- 8 Contact Canfield
Before you Register ViewMyConsult (VMC)

1 Office will need to submit the following forms to Canfield:
   - An agreement between Canfield and the Office, which can be located by clicking the Terms of Use button following the VISIA® and Reveal® installation process. For VECTRA®, please click here to access the registration page.

   Office will be provided with the following forms:
   - Client Consent form to have your clients sign authorizing uploads. For VISIA and Reveal, the Client consent forms will appear on-screen for your patients to sign during the consultation process.

2 Once Canfield processes the agreement form, the person you have assigned as the VMC Super Admin User will receive an automated email confirmation with temporary password.

3 Decide on the users of the portal and their roles. This will determine the privileges assigned to each user in the Practice Admin area of VMC. The administrator will then be able to add users and assign privileges on ViewMyConsult.com.

   See the following sections, Setting Up Employee Privileges and Scenarios to Consider.

4 Decide if you will have your workstations networked, how many and which workstations will have VMC access. If you are going have multiple workstations pointing to a server, you will need to create a user account that
   - has rights to run as a service,
   - has read/write access to the folder where the application images are stored, and
   - has a password that never expires.

   You will be prompted for the credentials for this user during your installation.

   **NOTE:** Port 9091 must be open on your firewall and you must have access to servers and workstations.
### Setting up Employee Privileges in ViewMyConsult

**NOTE:** *Admin* or *Super Admin* privileges are required to modify Employee Privileges in ViewMyConsult.

1. Log in to ViewMyConsult.
2. Click “Practice Admin” at top right of the screen.
3. Click **Employees** on the left side of the screen.
4. Click on a name to view the “Existing Employee” dialog.

- Every user is required to have an Email address and an Employee Name.
- Green backgrounds on the slider controls denote enabled privileges.
- To remove an existing employee from the list, disable all of their privileges.

*See following page for descriptions of each Employee Privilege.*
Descriptions of Employee Privileges in ViewMyConsult

Consultation  The names of employees with consultation privileges are available in the “Practitioner” drop down menu during upload from your Canfield application (i.e., VECTRA, VISIA, Reveal, Mirror). If the Employee Name is in the drop down, a user who is uploading a consultation to VMC can assign that consultation to the Practitioner. This may also affect what is displayed to the patient in ViewMyConsult.com (see Setting up Patient Home Page).

Dashboard  If enabled, employees will be able to view consultations assigned to them on the “dashboard”: patient consultation images that have been uploaded and the patient’s page-view and log-in activity on VMC. Only activity for those consultations assigned to them as the “Practitioner” will be visible on their dashboard (see Consultation).

Delegate  If enabled, the employee can then be given access to view the dashboards of one or more Practitioners as designated by an Administrator. This employee is then considered a delegate of the Practitioner, but only with respect to dashboard viewing.

Analytics  If enabled, the employee will be able to view graphical analysis of a variety of consultation metrics, including the number of consultations and/or recommendations by date, office, practitioner or time frame.

Upload  If enabled, the employee will be able to upload consultations to VMC. If “Upload Authentication” is enabled for their office, the employee will be required to enter their Email address and password when uploading consultations.

Admin  If enabled, the employee will be able to edit Office and Employee information on VMC.

Super Admin  Only Canfield can assign super admin privileges. The office declares who they would like to be assigned super admin privilege during the VISIA and Reveal instillation process. Offices utilizing VECTRA will need to share this information with Canfield. The Super Admin’s privileges cannot be taken away by any other employee. In addition to their admin privileges, only a Super Admin can edit “Practice Info”.

Sample: Upload screen in VECTRA software
Scenarios to consider for Employee Privileges

Mouse over (or tap) 📌 for more info.

- **What if there is a single person (e.g.: a doctor) who will perform all of the office’s patient consultations?**
  This person handles the consultation from start to finish, reviews their dashboard for patient log-in activity, and manages all office and practice information.

  *Use a single account. This user should be assigned the following privileges:*

  ![Privilege Settings](image)

- **What if I have multiple employees at my office (e.g.: doctors, estheticians) who operate independently of one another and perform consults for their own patients?**
  These employees do not share patients but they do handle their own consultations from start to finish.

  *Create multiple user accounts for each individual owner of consultations. Each user should be assigned the following privileges (same as above):*

  ![Privilege Settings](image)

- **What if I want to give access for other employees to upload sessions to my portal?**
  This employee may perform the upload after the consult and is responsible for obtaining the patient’s email address, explaining informed consent, and getting informed consent forms completed.

  *Create employee users who have only upload privileges.*

  ![Privilege Settings](image)

- **What if I want to designate an employee whose only privilege is to view a practitioner’s dashboard?**

  *From the “Employees” tab, select an employee, or create a new one. For this employee, assign only the “Delegate” privilege. Then follow the instructions for Setting up Delegations (see following page).*

  ![Privilege Settings](image)

**NOTE:** An employee must have at least one privilege enabled to appear on the “Active Employees” list.
Delegations tab allows an administrator to delegate the dashboard privileges of a practitioner to another staff member (the “delegate”).

**NOTE:** Delegate privileges (see preceding page) are required for a staff member to have access to a practitioner’s dashboard.

**To give an employee access to a practitioner’s dashboard**

1. Click “Practice Admin” at top right of the screen.
2. Click **Delegations** on the left side of the screen.
3. Click “New Delegation” (upper right corner of the screen).
4. Select the practitioner from the drop down menu.
5. Select the office(s) associated with the intended delegate.
6. Select the intended delegate(s) from the list.
7. Click “Next Step”, then click “Save Delegation”.

---

ViewMyConsult GETTING STARTED GUIDE 6
Setting up the Patient Home Page

Mouse over (or tap) for more info.

**Practice Info > Patient Home Page** determines what is displayed to the patient in the upper left corner of ViewMyConsult.com screens. Users with “Super Admin” privileges can modify Practice Info.

1. Click on the left side of the screen.

2. Click the blue “Edit Practice Info” button in the upper right corner of the screen.

3. Select what you want displayed for patients from the “Patient Home Page” drop down menu: the name of the website (ViewMyConsult), your practice name, office name, or practitioner name.

   - If you select “Practitioner”, the patient will see the Employee Name of their assigned Practitioner in the upper left corner of their ViewMyConsult screen.

   - *Practitioners must have consultation privileges enabled in order to have consultation uploads assigned to them.* (See Consultation on page 4.)
For installation assistance, contact CANFIELD technical support
  phone (USA): 1.800.815.4330
  phone: +1.973.434.1201
  techsupport@canfieldsci.com

For additional assistance with using ViewMyConsult, contact the CANFIELD training department
  800.815.4330
  training@canfieldsci.com