Explorer Online User Guide

Overview

This article will cover the basic functionality of Medical-Objects Explorer Online. If you have any questions or require any further information, please contact the Helpdesk on (07) 5456 6000.

Medical-Objects Explorer Online is a web-based solution that allows you to send and receive patient documents from your own personal web browser on a tablet, desktop or laptop device.

Requirements

Explorer Online was designed to run on desktops, laptops and modern tablets running Windows, MacOS or Linux. Mobile phones are not currently supported.

Please take note of the browser requirements below.

Supported Browsers

- Microsoft Internet Explorer 11
- Microsoft Edge
- Chrome
- FireFox
- Opera
- Safari 8+

Allied Health Users of Explorer Online

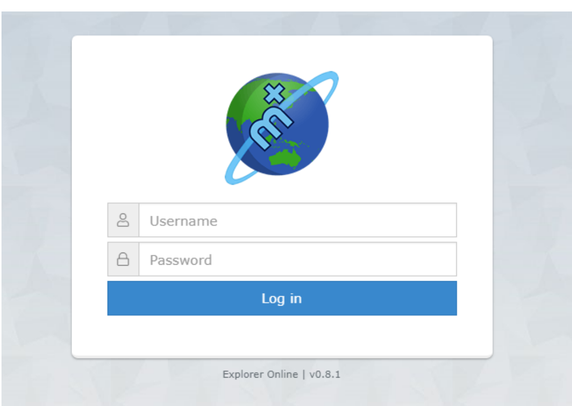
PROMs User Guide

Storage Quota Information

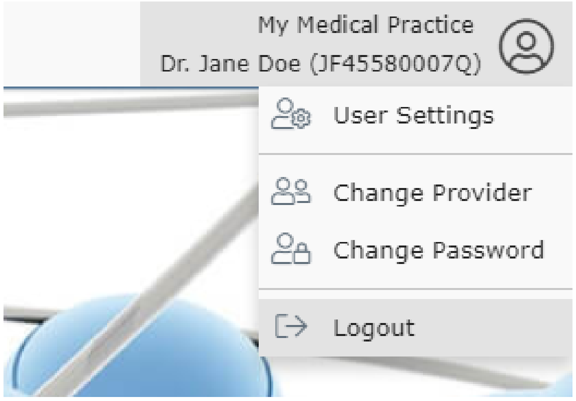
PROMs User Guide

Logging in and out

When first loading Explorer Online you will be presented with a login screen. Simply enter in your username and password and click login to proceed.



Once logged in you can **Logout** again or **Change Provider** by simply clicking on the **User Menu** in the top right hand corner of the screen.



Tip!

You will be automatically logged out after 10 minutes of inactivity. You can change this via the **User Settings** option in the **User Menu**.

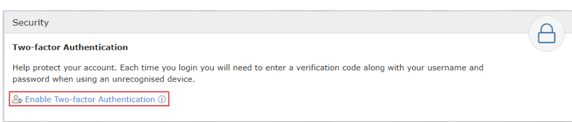
Setting up Two-Factor Authentication

Two-factor authentication is a security feature that helps protect your account in addition to your password. With two-factor authentication, a special login code together with your username and password will need to be entered each time someone tries to access your account from a computer or device that isn't recognised.

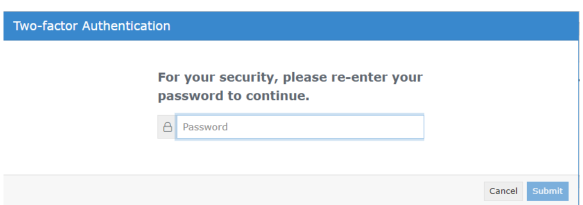
In order to generate the special login codes, you will need to install a free app which supports the Time-based One-time Password Algorithm (TOTP) such as Google Authenticator, Authy and Microsoft Authenticator. There are many others, and some of these apps also support generating codes from desktop computers.

To enable two-factor authentication can be enabled through the following steps.

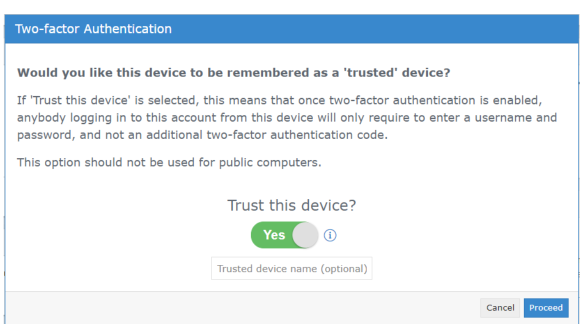
1. Once you have logged in, Two-Factor Authentication can be enabled by clicking 'Enable Two-factor Authentication' on the '**Security**' section in the **Dashboard.**



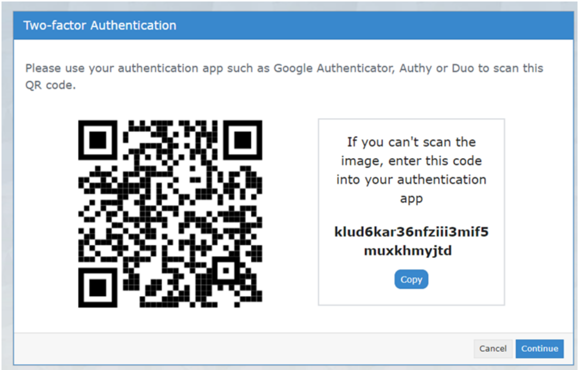
2. It will prompt you for your password



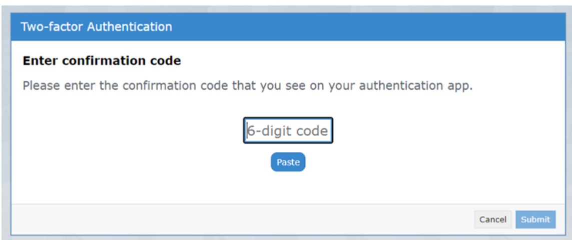
3. Decide whether you would like to set your device as a trusted device (this will allow you to skip these Two-Factor steps for 30 days on the selected device). Simply use the toggle button below “Trust this device” to select your choice, then select “Proceed”.



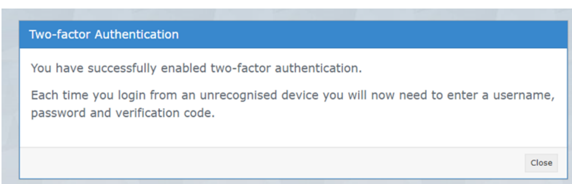
4. Open your Two-Factor Authentication app and scan the QR code provided (or enter the optional code), then click “Continue”.



5. Enter the code your app provided you, then select “Submit”.

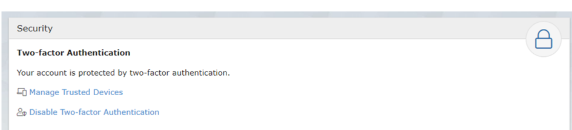


6. Your Two-Factor Authentication is now setup – Click “Close”.

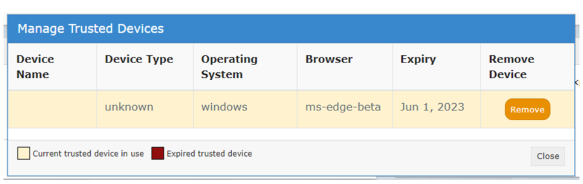


Managing Trusted Devices

1. Locate the “Security” section on your Medical Objects dashboard, and select “Manage Trusted Devices”.



2. A list of trusted devices should display. Simply click “Remove” to delete a trusted device.



Please note: Trusted devices will allow you to skip the Two-Factor steps for 30 days - once the 30 days expires they will show as a “Expired Trusted Device”. This means the next time you log into the portal on this device you will be prompted to enter the code you receive from your Two-Factor Authentication app.

2FA F.A.Q

<u>What is two-factor authentication?</u>

Two-factor authentication is a security feature that helps protect your account in addition to your password. With two-factor authentication, a special login code together with your username and password will need to be entered each time someone tries to access your account from a computer or device we don't recognise.

<u>What do I need to be able to use it?</u>

In order to generate the special login codes, you will need to install an app which supports the Time-based One-time Password Algorithm (TOTP) such as Google Authenticator, Authy, Microsoft Authenticator or Duo. There are many others, and some of these apps also support generating codes from desktop computers.

<u>Do I always need to enter a code when logging in?</u>

During login, you can choose not to use two-factor authentication again on that specific device by setting it as a ‘trusted device’. If you select this option, that device will only ask for your username and password when logging in for the next 30 days. You will still be protected, because when you or anyone else tries to sign in to your account from an unrecognised device, two-factor authentication will be required.

Browser third party cookies need to be enabled for Explorer Online and two-factor authentication to operate correctly. They are usually enabled by default.

You should not choose to trust a public device.

<u>How do I enable two-factor authentication?</u>

To enable two-factor authentication, you will need to use your app to scan a QR code generated by Explorer Online (or type in the code if you cannot scan it). Your app will then generate a confirmation code which you need to enter when prompted by Explorer Online.

Your account will now be two-factor authentication enabled, and you will need to generate a code with your app whenever prompted by Explorer Online during login.

<u>Can this be made mandatory for everyone at the organisation?</u>

Two-factor authentication can be made mandatory for all users. This will force each account on login to enable two-factor authentication (if it is not already enabled). Please contact our helpdesk (helpdesk@medicalobjects.com) if you would like this enabled.

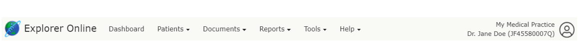
<u>How to reset two-factor authentication?</u>

If you have lost your device or app which was used to enable two-factor authentication, email helpdesk@medicalobjects.com for assistance.

Dashboard Layout

The Dashboard is the default page that will appear once you have logged into Explorer Online. The Dashboard is split into three sections: Navigation Menu, Sidebar and the main content area.

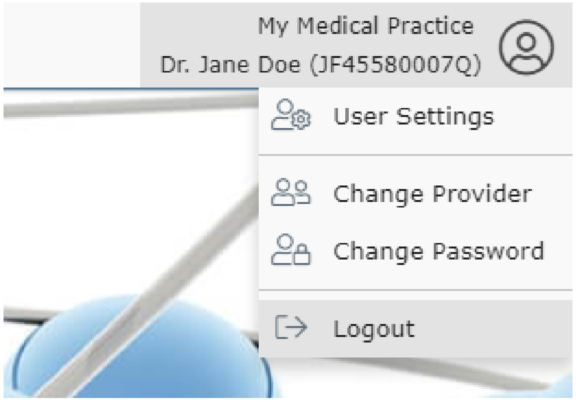
Navigation Menu



This is the main navigation menu. The menu is dynamically built up based on what features your server has enabled and what permissions your user account has. If a menu item is missing you may need to call the Helpdesk to correct your user permissions or enable a server feature.

User Menu

The User Menu is the menu in the top right hand corner. This will display the server you've logged into and also which provider you selected at login. When you click on the User Menu a drop down will appear with menu options related to your user account.

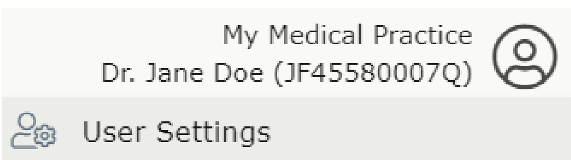


Email Notifications

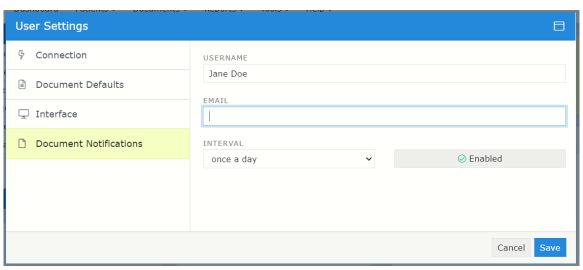
Warning

Please contact us to enable this feature on your account.

1. Click **User Settings** from the User Menu if you would like to enable email notifications.



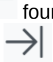
2. Next, click **Document Notifications** and enter the email address that you want to receive the notifications to.

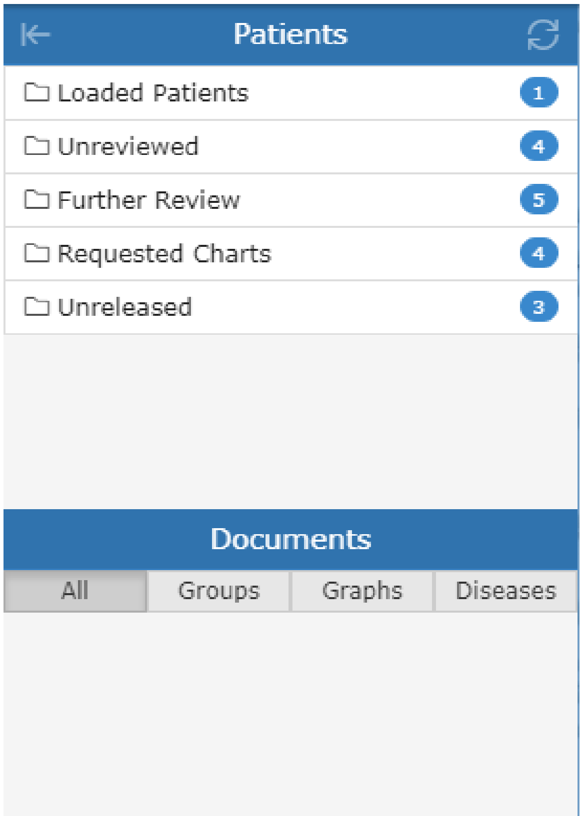


3. Set up the **Interval** of how often you want to receive email notifications - it's recommended once an hour or every 4 hours - and select **Save**.

Sidebar

The Sidebar is a feature that allows you to access and manage your patient documents. The Sidebar is split into two sections: Patients and Documents.

If you're using Explorer Online on a smaller screen you have the option to collapse the sidebar by clicking the collapse icon  found on the left side of the Patients header. You can then expand the Sidebar again by clicking the  icon.



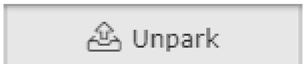
Patients

The Patients section of the Sidebar consists of individual folders which contains patient documents. The folders will list each unique patient that has a document for that folder. The count to the right is the amount of patients in the folder and not the amount of combined documents.

Hovering over a folder will reveal a grid icon ( ). This button will load all the documents in that folder into a grid. From there you can then perform bulk actions on the documents such as printing or forwarding to another provider.

To refresh the contents of the folders simply click the refresh button ( ) in the title bar.

Loaded Patients	Contains any patients you've done a lookup on or retrieved all documents for. You can remove a patient from this list by clicking the remove icon ( ). If you want to clear the folder and remove all patients you can click on the clear icon ( ).
Unreviewed	Contains patients that have unreviewed documents. Selecting documents from this folder will give you the option to mark the document as reviewed. A Max of 50 unreviewed documents will appear in the list. To see new results you must mark results as reviewed once they have been actioned.

Further Review	Contains patient documents that have been parked. A document can be parked by clicking the '**Park'** document action button.  Documents in this folder can only be accessed by the provider who made the original '**Park**' request. To remove a document from this folder click the '**Unpark**' document action button. 
Requested Charts	Contains patient documents with the requested chart status. A document can be moved to the Requested Charts folder by clicking the '**Request Chart**' document action button.  Any user in your practice's **Explorer Online** software, who has the granted permissions to view results, can access documents in this folder. For more information on setting user permissions, see our Explorer Online Admin Guide or plea se contact the Helpdesk on (07) 5456 6000. Practices can decide how to use this feature in their own workflows. For example, doctors can use this option as a request for staff to gather medical charts after receiving a message on a patient. Another example might be when a doctor receives an eReferral, and then clicks '**Request Chart**' so that staff can be ready with the referral on hand prior to a consultation with a patient. Upon completion of the workflow relating to the document, staff can then select the '**Cancel Chart**' document action button to remove it from the **Requested Charts** folder. 
Unreleased	Contains patient documents that have not yet been released. Documents in this folder can either be released or deleted.  An unreleased document will have the following red text in the document title to indicate that it has not yet been released.  Unreleased documents are created by ticking the '**For Approval Before Delivered**' option when sending a document.
Created	Contains a recent list of documents that you have created, This includes both progress notes and documents that you have sent. You can clear this folder by hovering over it and clicking on the **Clear Folder** button ( ).

Documents

The Documents section will list all the documents for the selected patient that correspond to the folder the patient is in. For example if you select a patient in the **Unreviewed** folder, all unreviewed documents for that patient will be listed.

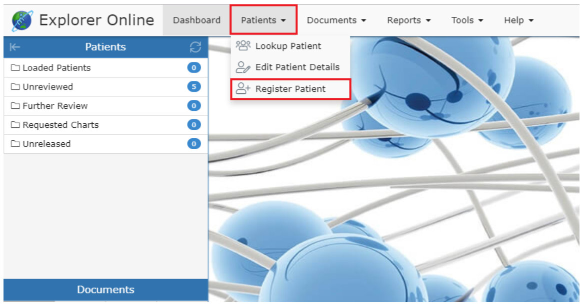
Hovering over the Documents section will reveal a grid icon ( ). This button will load all the documents listed into a grid. From there you can then perform bulk actions on the documents such as printing or forwarding to another provider.

Abnormal results will show as red in the documents list.

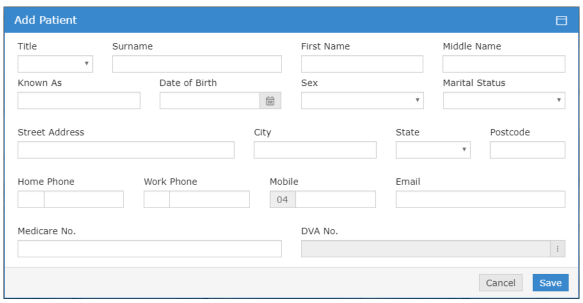
Managing Patients

Registering a Patient

To register a patient, select the **Patients** button in the top navigation and then click **Register Patient** on the dropdown.



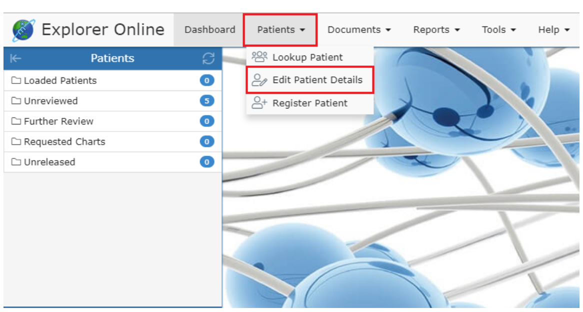
Once clicked, a window will pop up with text fields to input patient information, as seen in the screenshot below.



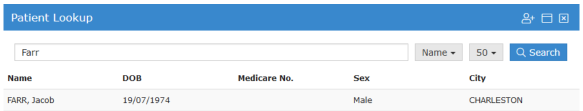
The required fields for registering a patient are **Surname, First Name, and Date of Birth**. While they are the only required fields, it's suggested that you fill as many of them out as possible, so you have as much information on documents as possible.

Editing a Patient

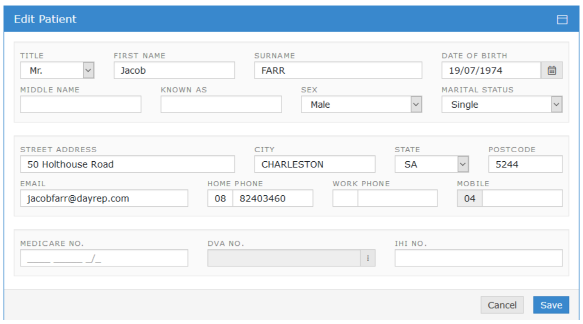
To edit a patient, go to the **Patients** dropdown in the top navigation bar, and then click **Edit Patient Details.**



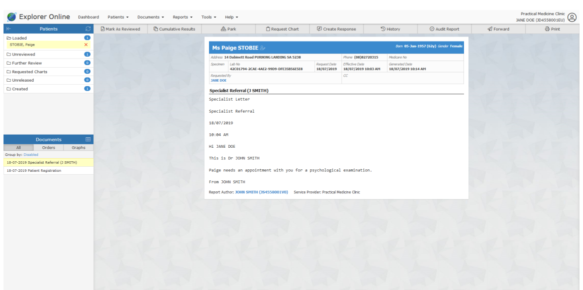
This will take you to the **Patient Lookup** window. The patient lookup window is used to search for current patients that your practice has previously created with Medical-Objects. You have three different options in which to search for, their name, ID or lab number. You can change these on the dropdown to the right of the search field. You can then type a search term into the text field, press the **Search** button and if all is well, you will see your patient.



Once you have found your patient, you can then select the patient you wish to view, and then you will see the edit screen. Fill out the fields that you wish to change or add, and then click the **Save** button.



Viewing Documents



Tips

- Pressing the space bar while viewing a document will scroll the document and then move to the next in the list.

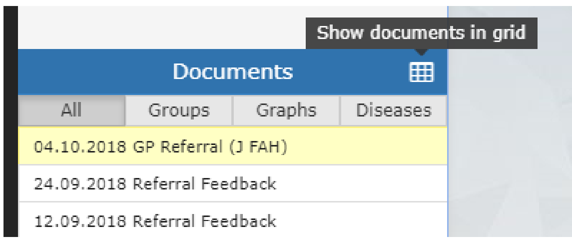
Document Actions

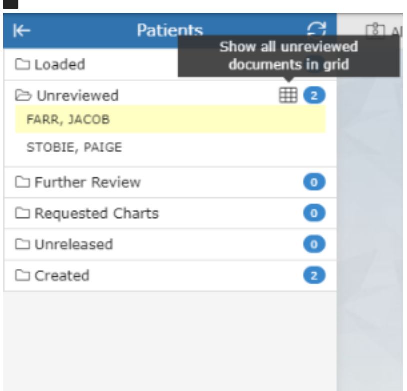
Park	Adds the document to the **Further Review** sidebar folder.
Unpark	Removes the document from the **Further Review** sidebar folder.
Request Chart	Adds the document to the **Requested Charts** sidebar folder.
Cancel Chart	Removes the document from the **Requested Charts** sidebar folder.
Create Response	Brings up the Send Document form with the patient, ordering provider and copies to fields pre-populated from the document.
History	Loads the transaction history of the document.
Forward	Allows you to forward the document to another provider.

Print	Allows you to print the document.
Release	This button is only visible for unreleased documents. It will release the document and send it to the addressed provider/s.
Delete	This button is only visible for unreleased documents. It will delete the unreleased document.
Mark as Reviewed	This button is only visible when viewing a document from within the **Unreviewed** sidebar folder. It will mark the document as reviewed.
All Documents	This button will show up when viewing a document from any sidebar folder *except* the **Loaded Patients** folder. When clicked it will load all the documents for the patient of the currently selected document.

Viewing documents in grid

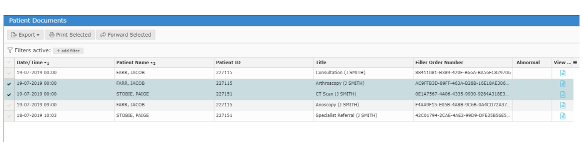
To list documents in a grid allowing for bulk actions you can simply click on the grid icon ( ) in the sidebar from either the documents section or when hovering over each folder.





Tips

- You can hide or show columns via the grid menu ( ) which can be accessed by clicking the far button on the grid.
- You can drag to re-order columns. The position of columns will be remembered.
- You can reset the grid layout by choosing **Reset View** from the grid menu.
- You can filter the documents in the grid by clicking the **Add filter** button.



Bulk Actions

You can select multiple documents in the grid and then perform an action on the selection. Currently the bulk actions available are:

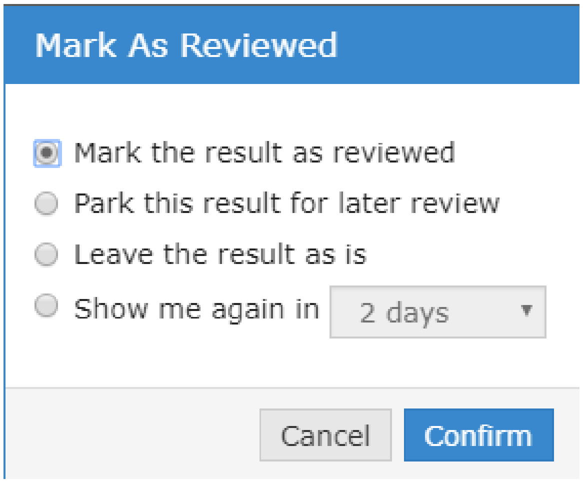
- Printing (This can be sent to a printer or saved as a single PDF)
- Forwarding
- Exporting to CSV (this exports the transaction details and not the document itself, useful for auditing purposes)

Marking documents as reviewed

Documents that appear in your **Unreviewed** sidebar folder will need reviewing so that the sender of the document receives an acknowledgement.

Marking a document as reviewed can be done one of two ways. Both methods will only be accessible if you're viewing the document from within the **Unreviewed** sidebar folder.

1. Clicking on the **Mark as reviewed** document action button.
2. Navigating to the next document in the **Unreviewed** folder. This will prompt you with a few options.

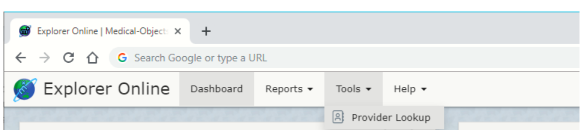


Sending a Document

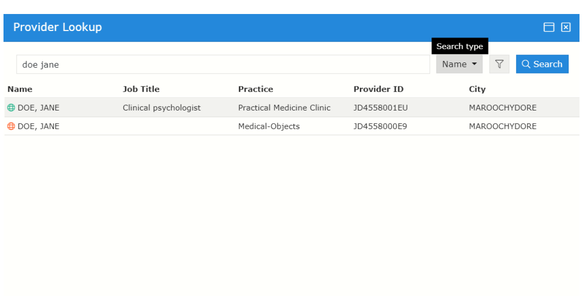
Provider Lookup

The **Provider Lookup** feature allows you to easily search details and check if a provider is routable (setup to receive sent results) before you send a document.

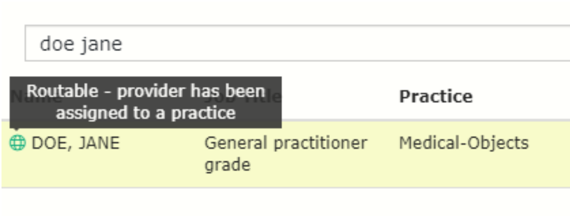
1. To access the **Provider Lookup** feature, click on the **Tools** tab, then click **Provider Lookup**.



2. Enter the details of the provider in the search box, enter the surname first if you are searching by the **Name** search type. Press the **Search** button or hit the enter key to load results.



3. You can check to see if the provider number is routable by looking for the green globe in the **Na me** column.



Having issues finding a doctor? Try the following:

- Change the search type to **Organisation**, and search for the practice name.

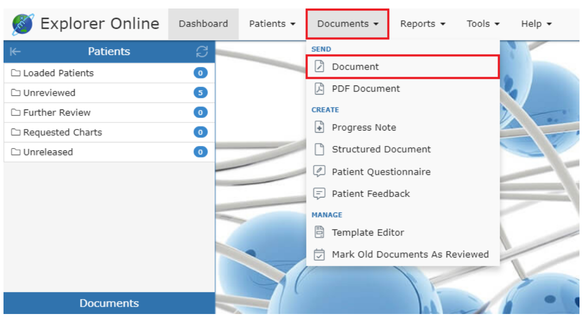
- Try a partial name search if you're unsure of the full name. "Bob Johnson" can be found by searching for "John B" or "Jo Bob".

- If the doctor has a space in their surname, try leaving out the space. For example, "Bob Von Doctor" can by found by searching "VonDoctor" as the surname.

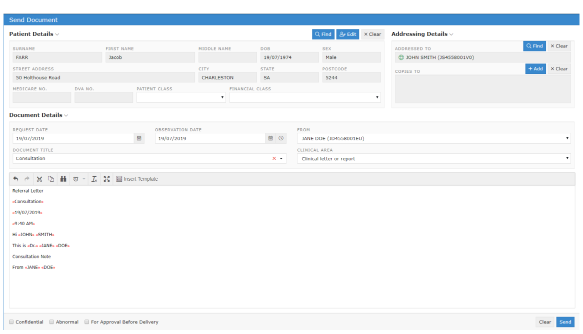
You can also complete the **Provider Lookup** when completing the **Addressing Details** when sending a document (see below).

Sending a Text Document

To send a document, you can click the **Documents Document** (Under Send) in the navigation bar at the top.

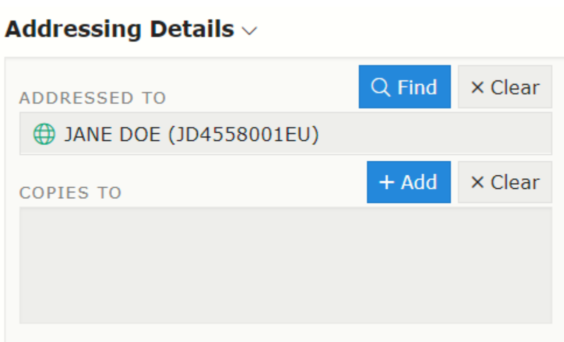


Most of filling out the document information is done automatically. If you have a patient selected in the **Pat ients Sidebar** then the **Patient Details** will already be filled out. If not, then you can click the **Find** button in the **Patient Details** section and find the patient details you need. You can also **Add** a patient on this screen, if the patient whose document you want to send isn't in the system yet.



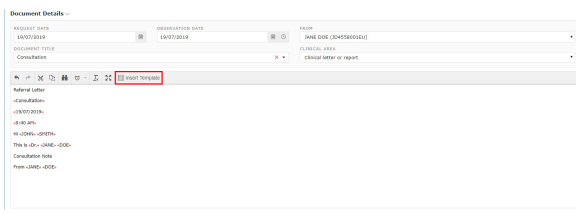
Addressing Details

To add a practitioner to send to, you can go across to the **Addressing Details** section. To add providers, click the **Find** and **Add** buttons, to either add the main provider, or to send copies to certain providers. This button will take you to the **Provider Lookup** window where you can find the providers you wish to send to.



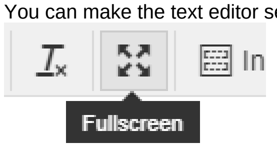
Document Details

You can then fill in the **Document Details** section with the specific details of your document. One of the special additions is the use of **Templates,** which you can click the **Insert Template** button to quickly add content to your document.



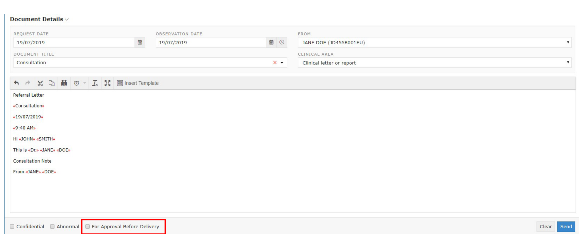
Tips

- You can make the text editor section full screen by clicking on the expand toolbar button.

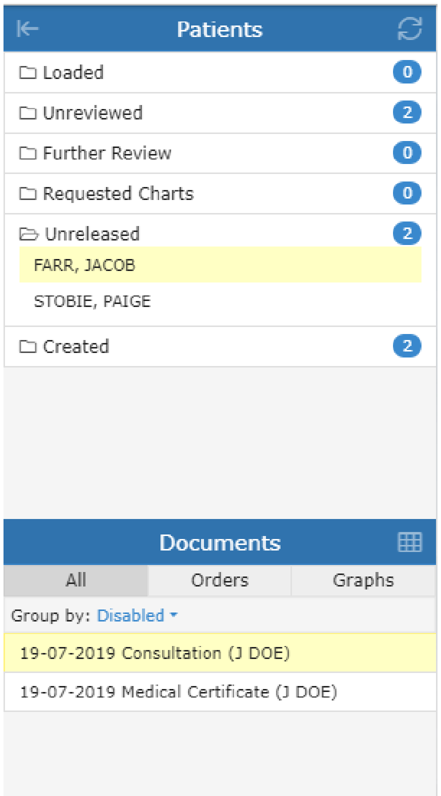


Unreleased Documents

An unreleased document can be thought of as a draft before sending the document. You may want to keep it in your system, but not send it off to the Addressee. If this is the case, then you can click the **For Approval Before Delivery** button in the bottom right of the **Send Document** screen.



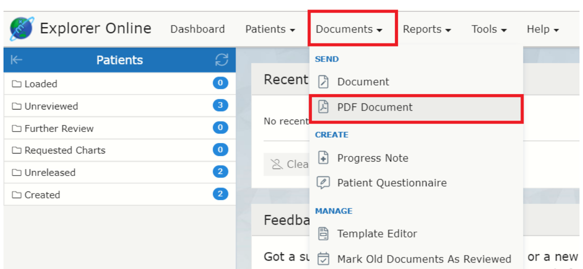
This will then save it into the **Unreleased folder** in the **Patients** section of the **Sidebar.**



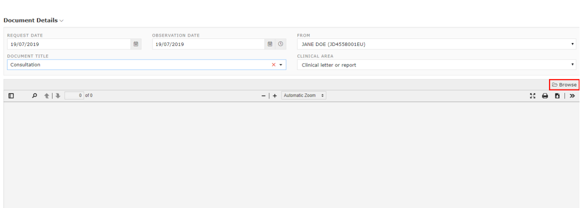
Sending a PDF Document

Sending a PDF document is very similar to sending a plain document. The main difference is that you aren't sending text, you are sending an attached PDF file. All of the Addressing and Patient detail setting is the same, the main difference is in the **Document Details**, where you normally would type in the content, there is now a **PDF Viewer.**

To send a PDF document, you can click the **Documents PDF Document** (Under Send) in the navigation bar at the top.

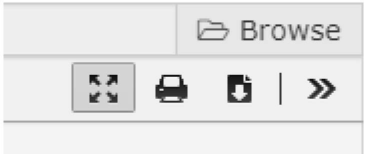


To open a PDF, click the **Browse** button:



Tips

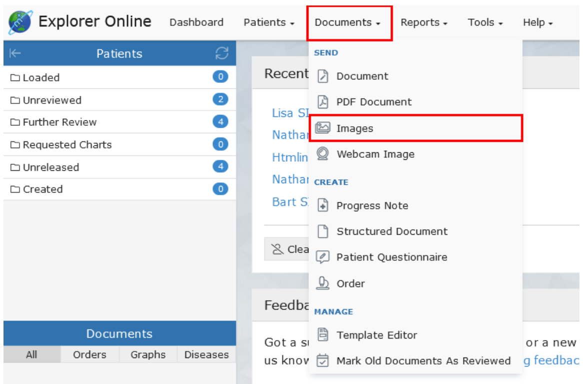
- You can make the PDF preview full screen by clicking on the full screen toolbar icon.



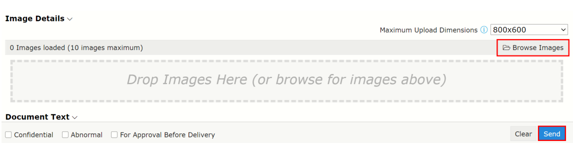
To send the PDF document, simply hit the **Send** button once all the information has been included,

Sending a document with an image

To send images you can click the **Documents Images** (Under Send) in the navigation bar at the top.



To add the images you would like to send, click the **Browse Images** button (below). To send the images, hit the **Send** button once all the information has been included.



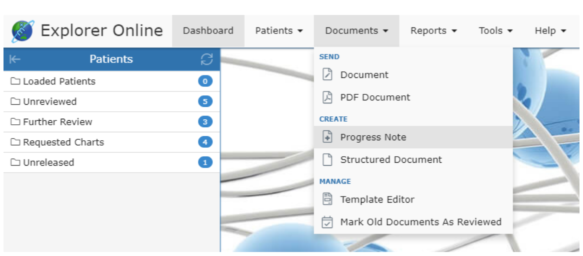
Sending a Word/RTF Document

Currently it's only possible to send a plain text document OR a PDF document. If you wish to send a Microsoft Word document or any other format you have the option to save the document as a PDF (for example from Microsoft Word) and then send it as a PDF.

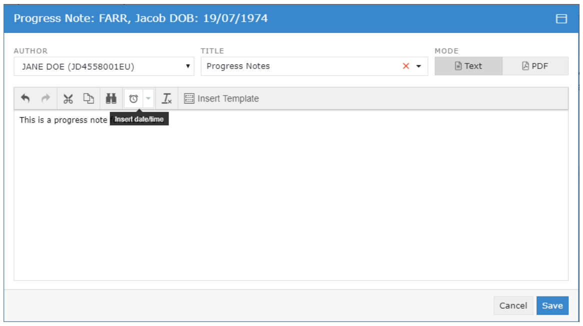
We're currently looking into adding the ability for sending other document types.

Creating a Progress Note

A Progress Note is an internal document for a patient that is stored against the patient's file. You can create a Progress Note for a patient from the **Documents** menu in the top navigation.



If you don't already have an active patient, you will be prompted to find a patient. Once a patient is selected you will be prompted with the Progress Note window.



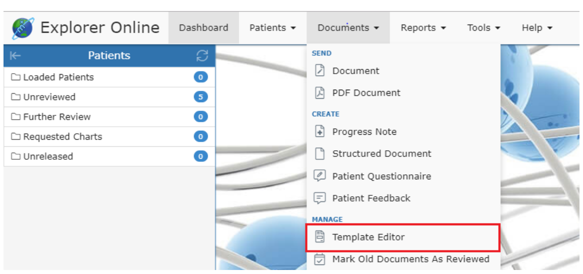
A Progress Note can contain plain text *or* a PDF document, but not both. Select which document content you'd like to add via the **Text** or **PDF** mode buttons in the top right hand corner.

Tips

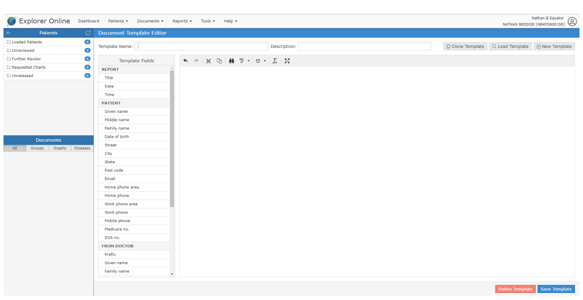
- You can insert a document template by clicking the **Insert Template** button.
- You can make the Progress Note window bigger by clicking the maximise button. ( )

Document Template Editor

To get to the Document Template Editor, you can click **Documents Template Editor** (Under manage).
A screen should show up with text editors, and a sidebar.



After clicking that button, it should take you to the screen below.



Creating a Template

A document template must have a template name, description and some content.

Template Name

The template name is what you'll see on your end to identify each template. You should call it something descriptive, but also keep it concise.

Description

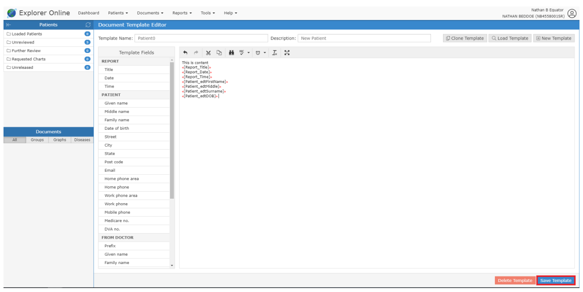
The description will show as a subheader when selecting the template. This is generally longer than the Template name and can help when you have a few very similar template names.

Content

The content is what will automatically be generated into the document when you select a template. You can see on the left of the template editor a "Template Fields", these are special fields, that when you import the template into your document, they will fill out with the details you've included. So if you have selected a patient named "John Doe", then the Given Name template field will be "John" and the Family Name field will be "Doe". You can also write plain text with no template fields if that is what you want.

Submitting a Template

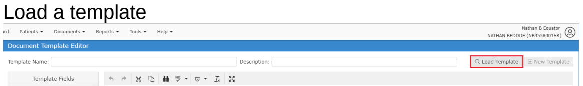
Once you have filled out the required fields, you can create the template by clicking the **"Save Template"** button, highlighted in the below screenshot.



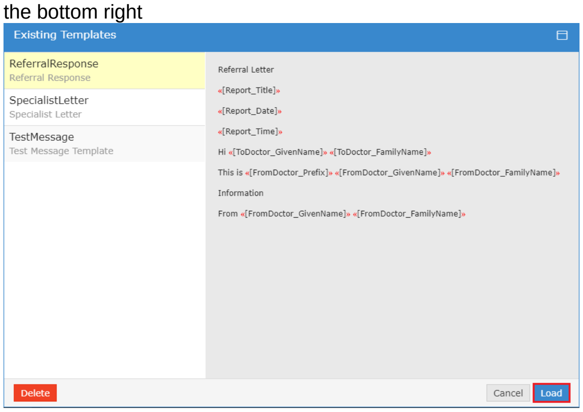
Editing an existing Template

To edit an existing template you need to:

Load a template



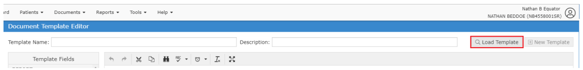
Select a template from the proceeding screen by clicking on the desired template, and clicking **Load** in the bottom right



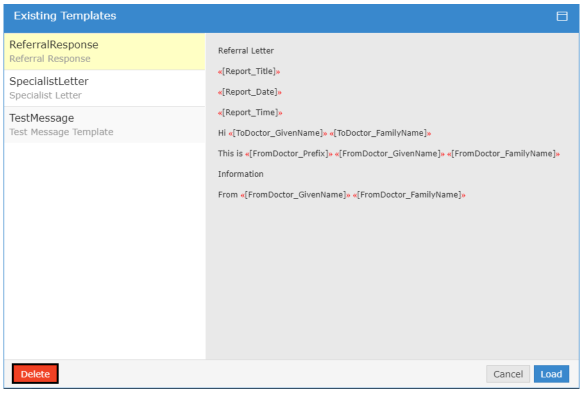
Make any changes that you wish to make, and then click the **Save Template** button in the bottom right, exactly how you would save a new template.

Deleting a Template

Click the **Load Template** button.

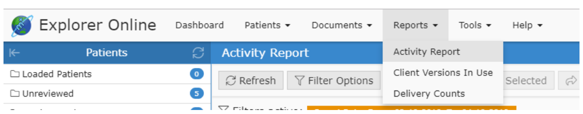


Then, select the template you wish to delete, and then click the **Delete** button in the right hand corner of the new screen.

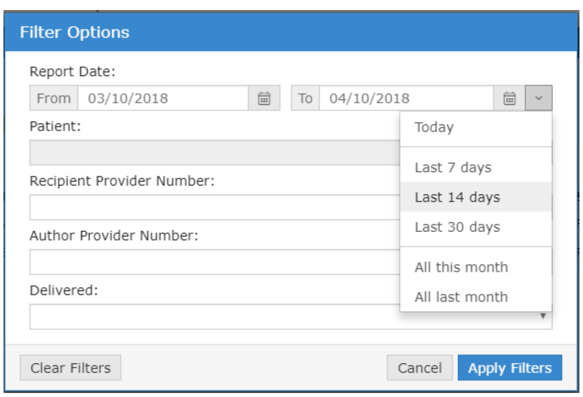


Activity Report

The Activity Report allows you to view the transaction history of both incoming and outgoing documents. You can access the Activity Report via the **Reports** top menu option.



When selecting the Activity Report menu option you will be presented with a window listing the report filtering options available. These will help you narrow the report down to only the documents you're interested in. By default, the filter options will show the current daily activity. You can leave it at that or you can click on the drop down button next to the end date to select a pre-defined range.

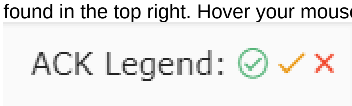


Tips

- You can hide or show columns via the grid menu (☰) which can be accessed by clicking the far button on the grid.
- You can drag to re-order columns. The position of columns will be remembered.
- You can reset the grid layout by choosing **Reset View** from the grid menu.

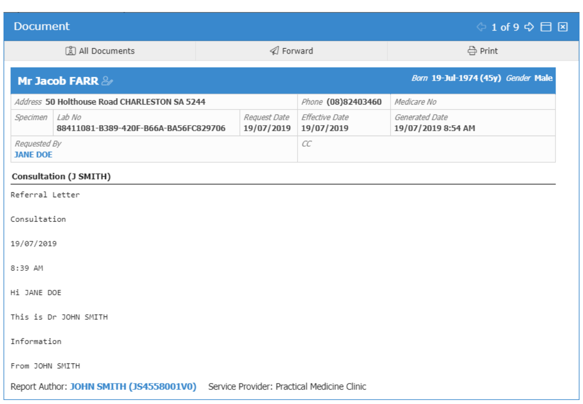
Understanding the report

Date	The date the document was created.
Patient	Patient name. SURNAME, First name (Date of Birth)

Recipient	The provider the document was addressed to.
Report Title	The document title.
Author	The provider that authored the document.
To Practice	The server name of the practice that the document was sent to. This is generally the practice name.
Status	The status of the document. The most common are; ■ Final result - document stored and verified. Can only be changed with a corrected result. ■ Not yet verified - document stored but not yet verified. ■ Correction - correction to the document.
Delivery Type	The software of the recipient that received the document.
Delivered	This is a timestamp for when the document was delivered. It does not necessarily mean that the document has been viewed or reviewed - only that it has been delivered. If this field is blank then the document has not been delivered.
Reviewed	The document has been marked as reviewed at the receiver's end. This column will only be populated if the receiver's **Delivery Type** is *EQUATORDXTRAY*. If not then it's best to look at the **ACK** column for an indication if the document has been acknowledged.
ACK	This column allows you to know whether or not the document has been acknowledged. To see what each icon in this column means; refer to the **ACK Legend** that can be found in the top right. Hover your mouse over each icon for a description. 
View	Clicking the icon in this column will display the document.

Viewing documents in the report

You can view a single document by clicking on the view document icon () in the **View** column of the grid. This will open the document in the document viewer window.



From this window you can perform various actions on the single document such as print, forward or loading the patient file via the **All Documents** button. You can also navigate to other documents via the back and forward buttons in the top right.

Bulk Actions

You can select multiple documents in the grid and then perform an action on the selection. Currently the bulk actions available are;

- Printing
- Forwarding
- Exporting to CSV (this exports the transaction details and not the document itself, useful for auditing purposes)