Access simplifyMD University at:

www.simplifyMDU.com

SITE FEATURES

simplifyMD University contains the following features:

Video Training - Access lesson-based videos that teach users how to use simplifyMD. These videos are constantly being developed and improved.

Live Web Training - Users can register for and attend live web training. Classes are scheduled weekly and are listed on the training calendar in simplifyMD University.

User Guides - Users can download PDF versions of all of the simplifyMD user guides.

Templates - Practices can download and implement our form templates and upload them to their server to be used in their digital chart room.

Tip Sheets - Answers to frequently asked questions and application ideas that you can download and print for future reference.

TROUBLE LOGGING IN?

Some users may see a pop-up message saying: 'Cookies must be enabled!' If you see this, follow these steps to add simplifyMD University as a trusted site.

1. In Microsoft Internet Explorer 7, go to **Tools > Internet Options**.
2. Click the **Privacy** Tab.
3. Click the **Sites** button.
4. In the **Address of website** field, enter ww.simplifymd.com
5. Click **Allow** to add the address to the Managed Domains list.
6. Click **OK** and return to simplifyMD University.

Now, you should be able to log in without error. If you continue to have problems, please contact us at university@simplifyMD.com

SIMPLIFYMD CUSTOMER AND TECHNICAL SUPPORT

If you have questions about your Digital Chart Room that you cannot answer through simplifyMD University or the online help, our live technical support team is available to help you with your issues.

Live technical support is available Monday-Friday from 8:00 AM to 8:00 PM EST.

Email: support@simplifyMD.com

Phone: 678-578-6187

simplifyMD Technical Support is only able to field calls that deal specifically with your Digital Chart Room, applications and equipment used with the Digital Chart Room (scanners, tablet PCs, etc.) and your Digital Chart Room appliance.

NETWORK ISSUES

If you have questions or issues about your office network or computer infrastructure, please contact your local IT provider.

ACCESSING YOUR DIGITAL CHART ROOM

You can access the records in your Digital Chart Room from any computer with Internet Access.

Use Microsoft Internet Explorer 7 (recommended) to go to **http://<name>.simplifyMD.com**.

<name> is the ID given to your practice by your simplifyMD trainer during the go-live process.

VISIT OUR WEB SITE

Visit us at **www.simplifyMD.com** to keep up on news and information about simplifyMD, The Digital Chart Room, and the issues that impact health care as a whole.

We are always working on new things, so check back often.

HOW TO REGISTER A PATIENT FOR THEIR PHR

1. On the Face Sheet, find the section called **Personal Health Record (PHR)**. Click **Register**.
2. A new window appears with the patient information filled in.
3. Enter the credit card information in the provided fields. All fields are required to complete registration (Visa, American Express, Master Card, and Discover credit and debit cards accepted.)

   Keep in mind:

   - You cannot register a patient without an email address.
   - If the person who is paying for the PHR is not the patient, you must enter their information in the **Payer** fields on the form. The name and address entered must match the name on the credit card being used.
4. Click **Submit** and confirm that all of the information entered is correct. If it is correct, click **Continue**. If changes need to be made, click **Return**.
5. If the charge is successful, the **Registration Receipt** appears with instructions for the patient on how to log into their PHR. You can print this document for them by clicking the **Print** button. If not an error appears explaining why it failed.

   The patient will also receive a copy of the confirmation page at the email address provided during registration.

IS THE PHR SECURE?

Yes. We use the same encryption technology used by banks, online retailers, and by the government for securing classified data. All the records that patients can access are kept in the appliance that is kept on the premises (your data never leaves your building).

HAVE A PROBLEM?

If you encounter any problems with registering patients for their PHR, please contact simplifyMD Technical Support:

Quick Reference Guide

The Digital Chart Room powered by simplifyMD

FIND A PATIENT

1. Click **Home**.
2. Click the **Patient Finder** tab.
3. Begin typing the last name of the patient you want to view. As you type, the patient list below shows only the patients that match the letters you have typed in.
4. Once you see the patient's name, you can stop typing and click on the name to access the chart.

ENTER A NEW PATIENT

1. Click **Home**.
2. Click the **Add Patient** tab**.**
3. Enter the patient information in the appropriate boxes. The fields marked with a red exclamation point (!) are required to create the chart.
4. Click **Save.**

MAKE AN APPOINTMENT

1. Click **New Appointment** from **HOME** screen.
2. Enter patient name, provider and type of appointment.
3. Click on the calendar icon to select date and time.
4. Click **Save**.

PRINT PATIENT FORMS

1. Go to **Schedule Tab** - Select 'check in' from the **Action** drop down menu.
2. Click the check-in templates you need and click **Print**.

SIMPLE PRINT

Simple Print is used to move documents from your computer to the Filing Center in your Digital Chart Room.

Install the Simple Printer on your computer with this address: (your practice name) .simplifyMD.com;631/printers/dropbox

Print to the Filing Center from your PC

1. Select a file and select Print.
2. Select Simple Printer and Save
3. The document is added to the Filing Center.

FILE A DOCUMENT

1. In the Filing Center, click on the document in the document index window.
2. Above the document, fill in the document filing information.
3. To file the entire document, keep "file entire document' checked. If not, check **file pages**.
4. Click **Save**.

ASSEMBLE DOCUMENTS

1. Find the patient.
2. Click on the Assembly Tab.
3. Select documents to send.
4. Click **preview to print/fax**.
5. To fax, enter fax number, click **Send.**
6. To print, click **Print** and click **OK**.

PRINT BARCODES

1. Printing barcodes can be done on the patient's **Face Sheet** or from the **Schedule**.
2. Click **Print Barcodes.**
3. Select the proper filter from the **Filter** drop-down menu.
4. Select the tabs required or select All.
5. Click **Print**. A separate barcode page is printed for each tab selected.

SCAN DOCUMENTS

Scan from the Filing Center:

1. From the **Filing Center Functions** drop-down, choose default scan.
2. Select scanner.
3. Click Select. (with or without barcodes.)

Scan into Patient's Chart:

1. From patient's Face Sheet, click tab where documents should be filed.
2. Click T.
3. Click **Scan default document into (name)** then **Select**.

CREATE/SEND A MESSAGE

Patient Message

1. Access a patient's chart.
2. Click **New Message.**
3. Choose recipient(s) **or** select "note to chart" if you want to save the message to the chart without sending it to someone.
4. Write the message.
5. Click Send.

Message with a Document

1. Go to document
2. Click **New Message**.
3. Choose recipient(s).
4. Write the message.
5. Click Send.

Inter-office Message

1. Click Home.
2. Click New Message.
3. Choose recipient(s).
4. Write the message.
5. Click Send.

SIMPLE KEYS

F2	Home Page
F3	Task Center
F4	Filing Center
F5	Refresh
F8	Add Patient
F10	Tools
F12	Log Out
Alt+M	New Message
Alt+N	New Appointment

A, F, AND T BUTTONS

These buttons are located on the right side of the tab bar inside patient charts.

A is for **ACTION**. Click to change the document name, date, apply a label to it, or move it to a different tab.

F is for **FAX**, Click to fax the document, send a message with it, and receive a fax confirmation.

T is for **TAB ACTION.** Click to scan, view all templates, and upload or create new templates.

DIGITAL CHART ROOM TERMINOLOGY

Abstracting Documents- Moving documents from one place in the Digital Chart Room to another. Documents can be moved within a chart, to and from the Filing Center, to and from Archive and to and from the Recycle Bin.

Archive - Clicking on the Archive Tab shows all documents in the chart that have not been assigned to another tab. This tab can be used to store "inactive" documents in the patient chart, and also is frequently used to store documents before sorting them to their appropriate tabs (i.e. when scanning in a large paper chart.)

Assembly Tab – Displays a list of all documents in a patient's chart, enabling you to assemble specific documents to print, fax, or email.

Drawers- These hold your digital files. There may be a drawer for patient charts, another for Invoices, Insurance, Credentialing, Employee records, etc.

Face Sheet- The first page in the digital chart, which displays patient data, including personal, demographical, and clinical information. Face sheet styles may be customized based on your practice preference in the Admin Tab.

Filing Center- The filing center is where all faxes and scanned documents arrive and stay until they are distributed appropriately.

Labels- Labels can be added to documents to define or group them according to type or content. Patient Labels are entered on the Face Sheet for tracking purposes.

Note to Chart – A type of message, used to write a message that stays in a patient chart, but is not sent to another team member. Usually used for non-clinical data in a patient chart, and should not be used for clinical data.

Simple Chart- A system chart tab that displays a collection of the physician's most frequently viewed documents in a chart. Whereas other chart tabs show all documents belonging in that tab, the Simple Chart tab shows you all documents across all the tabs that the physician wants to see quickly.

Tabs- Dividers in a patient chart to separate and group your documents. There are three Tab types in the Digital Chart Room.

- System Tabs – Tabs located in top row when you are not in a patient chart. These **cannot** be changed.
- Patient System Tabs – Tabs located in the top row when you are in a patient chart. These cannot be changed.
- Document Tabs – Tabs set up by your practice –they will replicate the sections of your current paper chart.

Task Center- A system tab that takes you to your personal message center. (Similar to an email in-box). The messages will stay until you take an action to resolve them. Your messages sent and received are stored and tracked, so that you will always be able to go back to them.

Timeline - A patient system tab that gives you a visual diagram of all documents over time in the chart. Each document icon in the timeline links directly to the document itself for fast viewing.

Tools – A system tab where passwords can be changed, reports run, system statistics read, address book created, and more.

Widgets- Boxes of information that comprise the Face Sheet. Widgets can be easily edited, hidden or moved.