Mobile Application

Comprehensive User Guide for Android

perfectserve Clinical Collaboration

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Downloading the mobile application

1. Open the Play Store and search for **PerfectServe Clinical Collab.**
2. **Download** the application.
3. Once installation is complete, select **OPEN**.

Scan the QR code to navigate directly to the application in the Play Store.

Logging In

1. Sign in using your PerfectServe Clinical Collaboration credentials or, if instructed to do so, your hospital-issued credentials.
   - If you are unsure what to enter, contact your PerfectServe Clinical Collaboration administrator or Support at 877-844-7727
   - If you are using hospital-issued credentials, contact your Hospital IT department for login assistance.
2. Create a **PIN.**
3. Re-enter your **PIN** to confirm.

All personal information will remain confidential and secure, neither shared nor sold. View our privacy policy at www.telmediq.com.

Complete Control At Each User's Fingertips

Messages

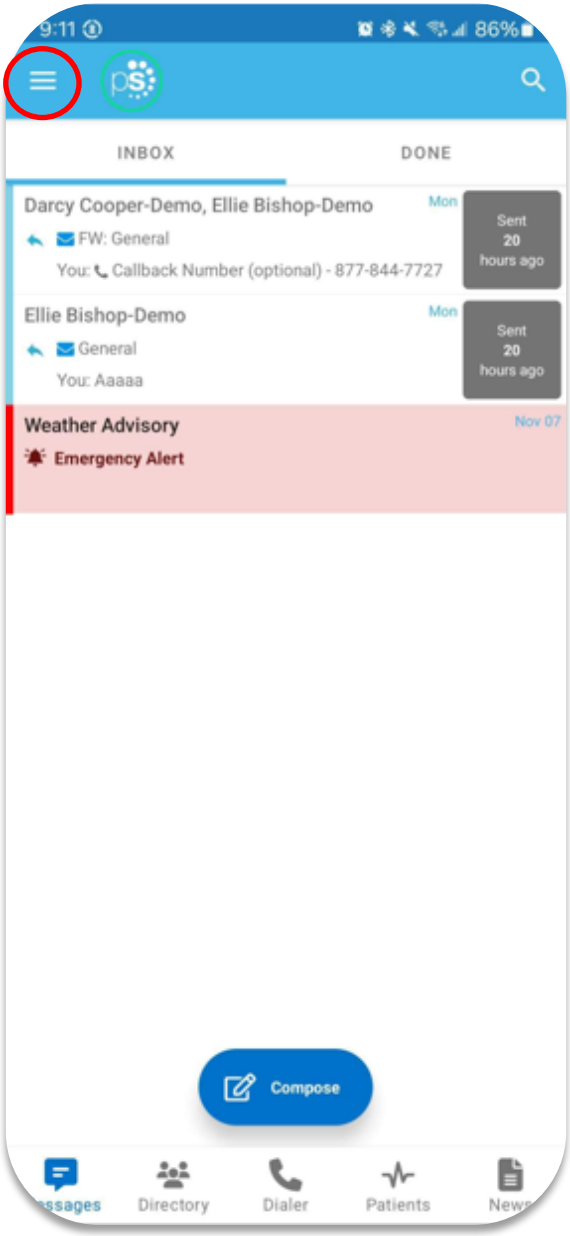
Read, reply, and create secure text and voice messages with attachments. Access current or archived messages with a swipe of the toggle.

Directory

Locate providers and staff, view schedules, and confirm who is on-call.

Dialer

Dial the phone number of the individual you wish to reach. Your facility's dispatch number will display instead of your personal number, so your privacy is protected.



Patients

View your patient(s) or all patients and care team assignments. Join/leave a patient's care team. Initiate messages regarding the patient to their entire care team or a specific individual.

News

See informational announcements and news broadcasted from your facility.

Complete Control At Each User's Fingertips *continued*

Status

Adjust your status from 'online' to 'do not disturb' with a quick toggle.

Auto Response

Enable a predefined or custom automatic response to messages received.

Forward Pages

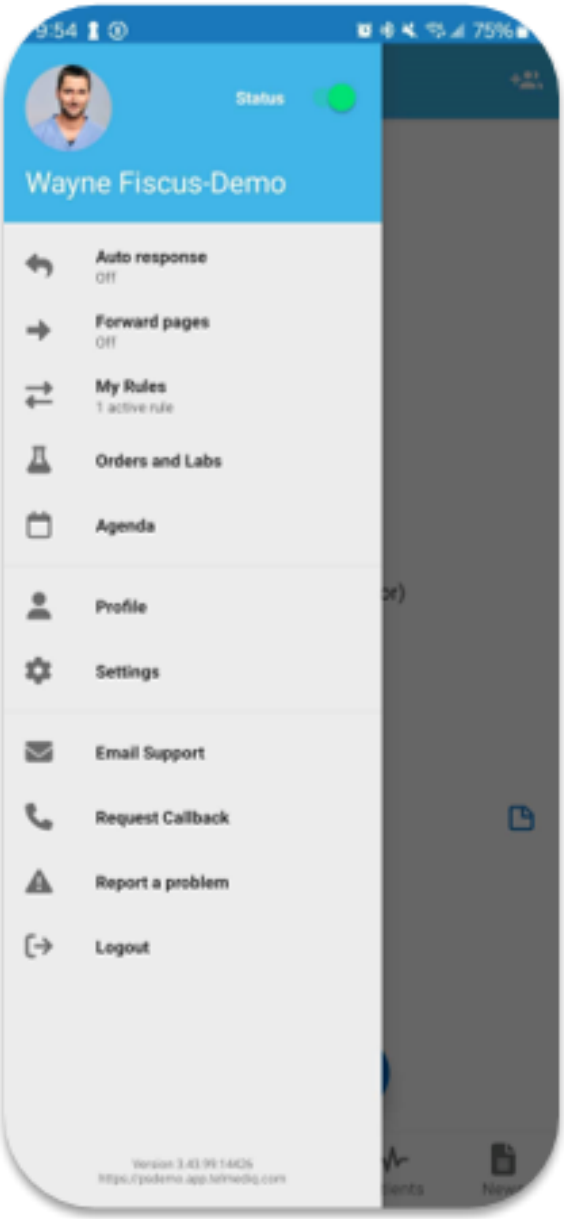
Enable message forwarding to another individual or broadcast group.

My Rules

Enable rules that can be used to provide an auto response and forwarding of messages for a specific timeframe.

Orders and Labs

Enable and set priorities or statuses to receive orders and lab notifications for patients.



Reach*

Connect with patients and their family members via messages or video direct to their personal devices.

Profile

View your personal profile, change your photo or edit your first/last name.

Settings

Customize your alert, call, message\, and security settings.

Email Support

Contact PerfectServe Clinical Collaboration Support through email.

Request Callback

Contact PerfectServe Clinical Collaboration Support through a phone call and request a callback for assistance.

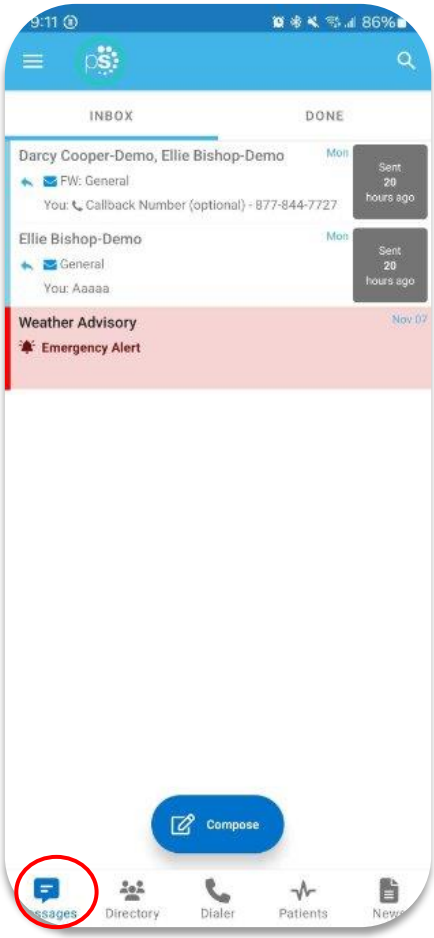
*This is an add-on module that may not apply to your facility.

Messages

The Messages tab is where all messages are accessed.

- Select **Messages** to see a list of your existing messages, or to start a new one.
- Along the left side of the Messages are icons that designate message status.

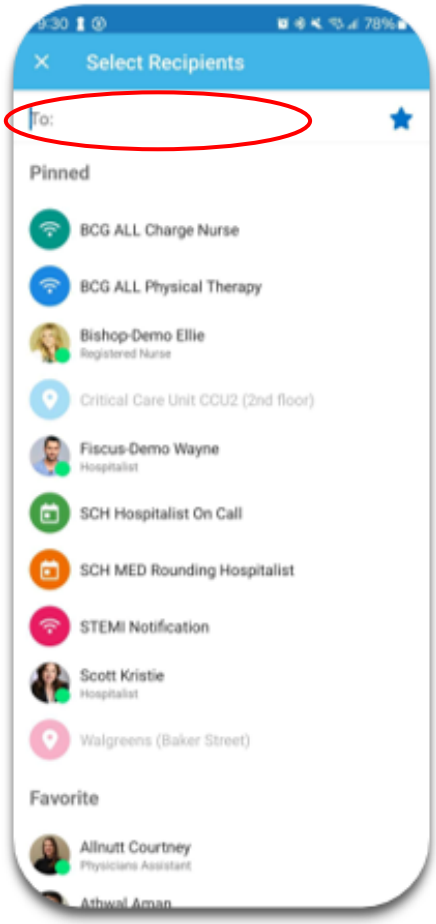
Icon	Message Status
●	Unread
!	Urgent Unread
↑	Sent
↩	Replied



Composing a Message

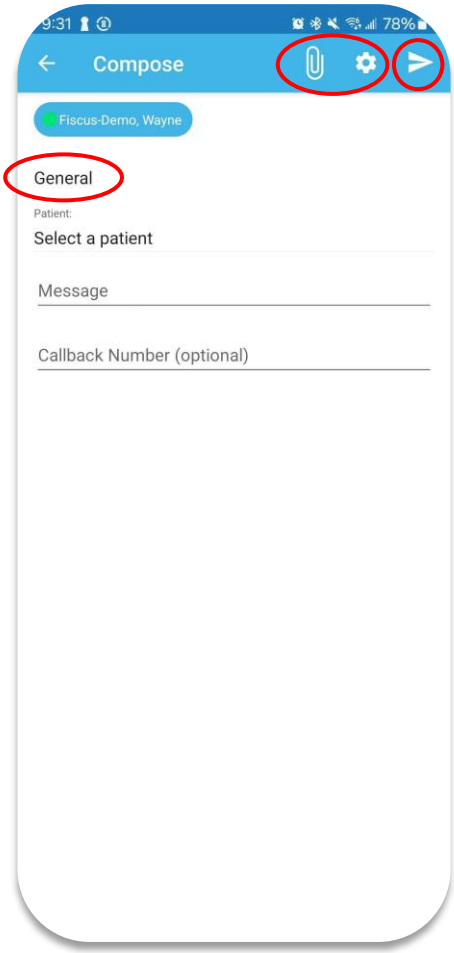
To start a new conversation:

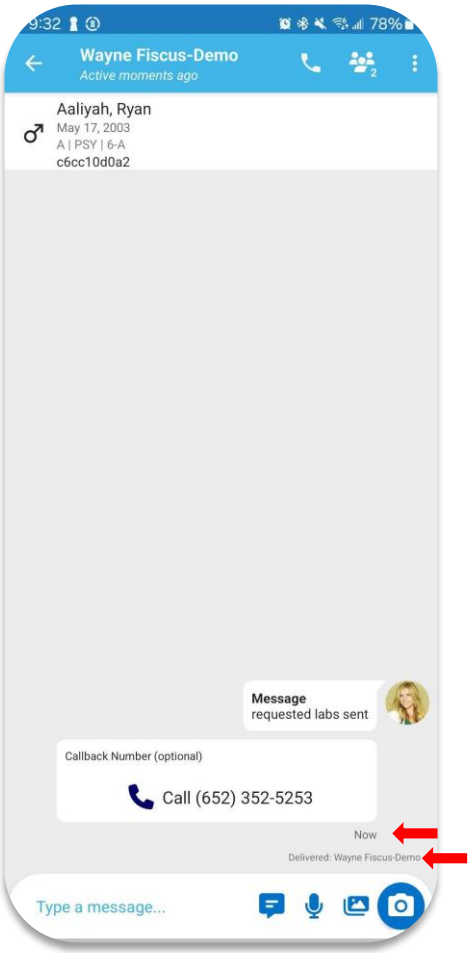
1. Select the **compose** in the middle bottom of the screen.
2. To find the person you wish to reach, you can use **Search, Pinned Contacts, My Favorites, Local Groups, or Recently Contacted** to quickly find your desired recipient.
3. To **Search**, type the name of the person or broadcast group you wish to reach in the Search bar. Search results update automatically as you type.



Composing a Message *continued*

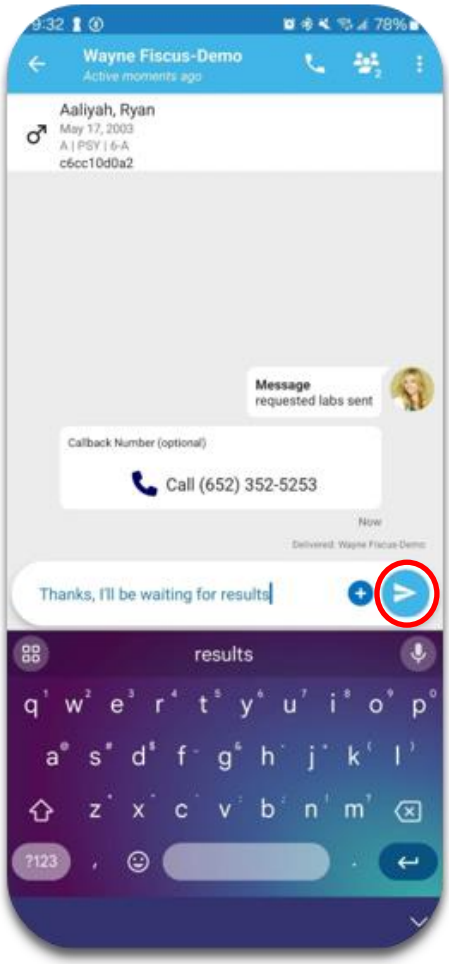
4. **Select** the message type you need to display the message template.
    - Message fields will change based on the template selected.
5. Select **Attach** to attach photos to your message or **record** a voice memo, and **Options** to access the message options.
    a. **Attach** = Access your phone's camera to take and attach a picture. You can also select to attach an existing photo from your phone's photo library. Images will not save on the phone and are stored on PerfectServe Clinical Collaboration's secure platform to ensure HIPPA.
    b. **Record** = Record and send an audio message. Audio messages will not save on the phone and are stored on 's secure platform to ensure HIPPA.
    c. **Options** = Display message options such as allow replies or reply notifications to toggle them on/off if available.
6. When finished, click **Send**.
7. Below the message, you will find the date and time you sent the message. You will also find the Sent/Read status of your message.

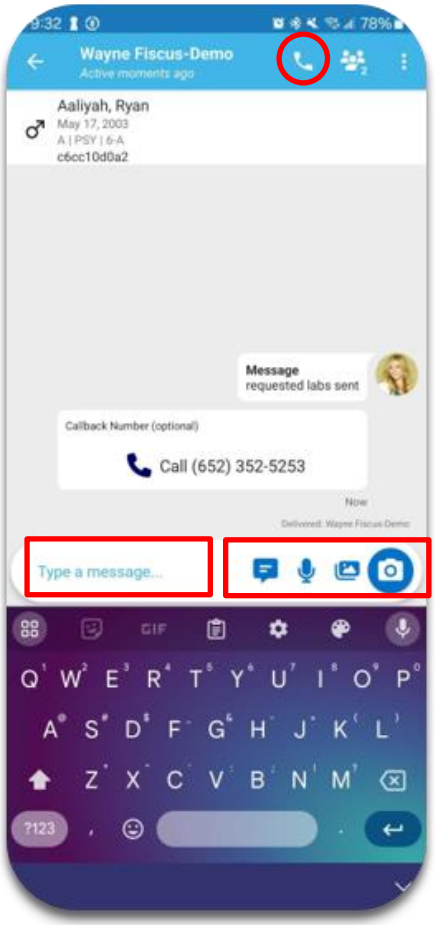




Responding to Messages

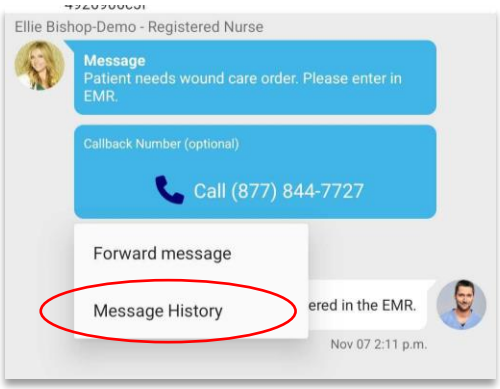
1. Select the conversation you wish to respond to in your Messages.
2. To reply via text, tap the Type a message field to start typing your message. When finished, press Send.
    a. **Camera** = Access your phone's camera to take and attach a picture.
    b. **Photo** = Access your phone's library to attach a saved picture.
    c. **Record** = Record and send an audio message.
    d. **Quick Response** = Select a templated quick response message to send.
3. To reply via a call, press the blue phone icon next to the sender's name and select **Call**.

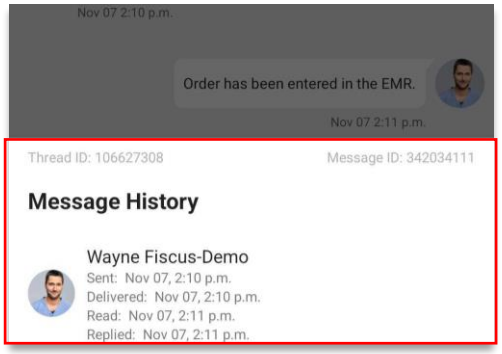




Message History

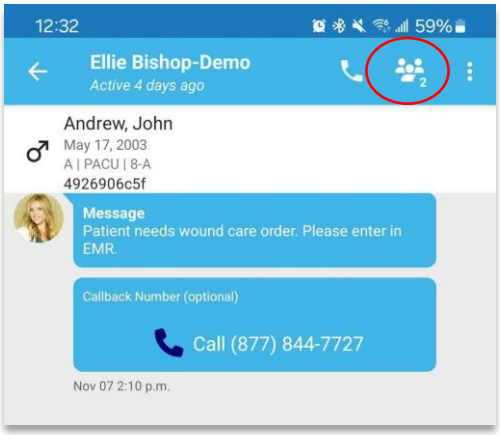
1. **Long-press** the message. It can be the text, photo, or even audio.
2. Select **Message History.**
3. The message status of each recipient will be listed, along with a full message history.

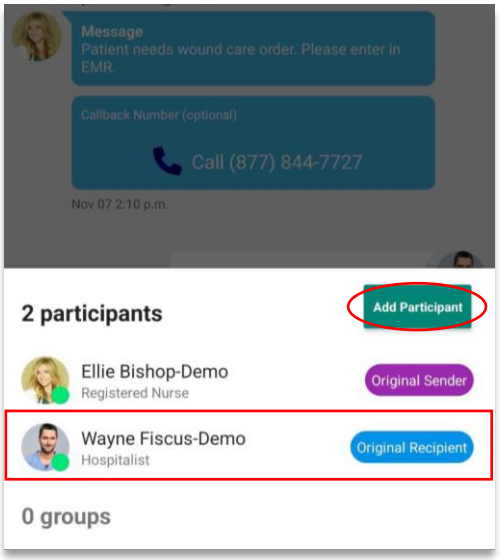




Message Participants

1. Select the **Participant** icon.
2. A list of message participants will display. Contact any participant by selecting their name.
3. Additional participant(s) may be added by selecting **"Add Participant"**.

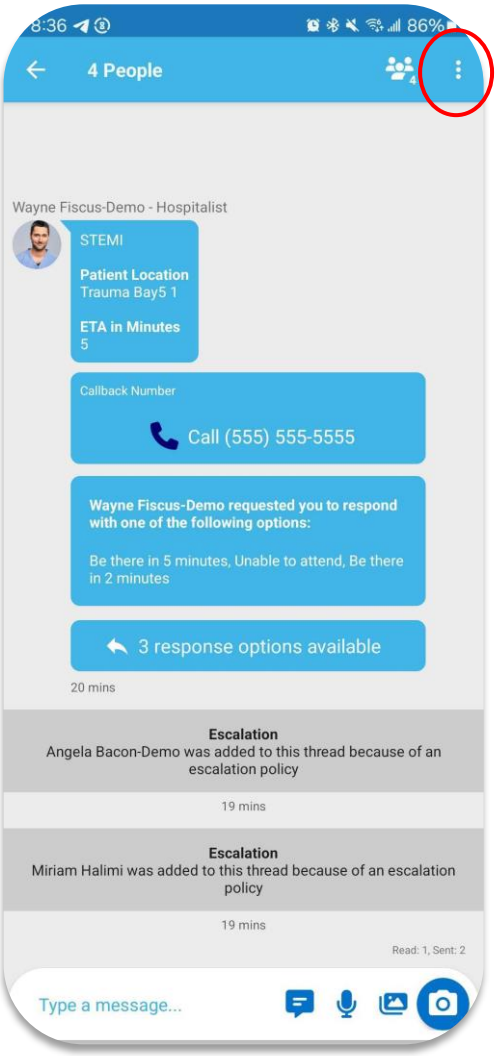


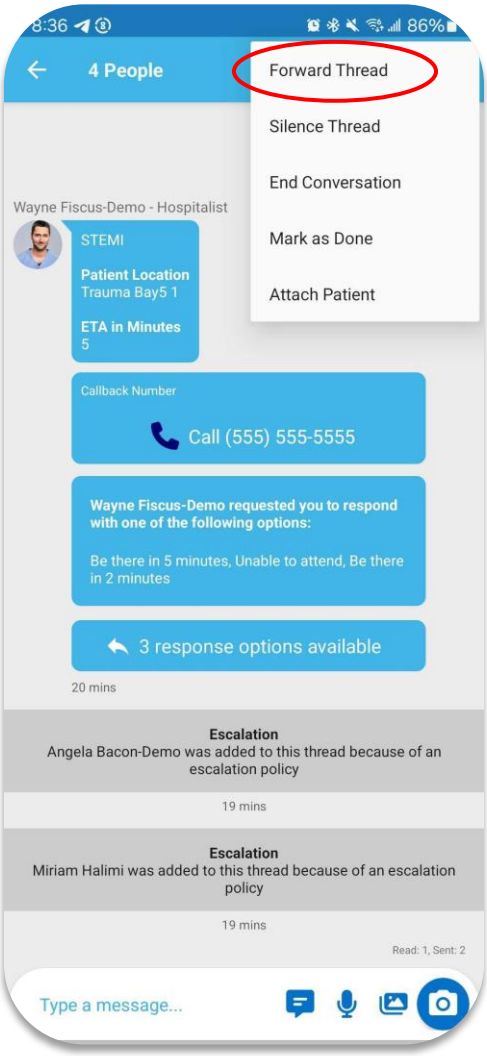


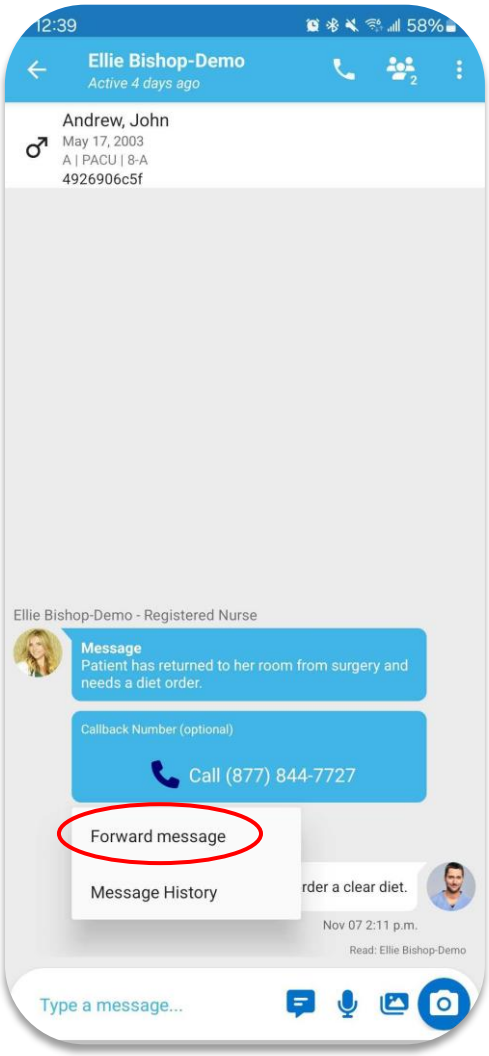
Forwarding Messages

There are two ways that you can forward a message thread in the PerfectServe Clinical Collaboration mobile application.

1. From the main **Messages** tab, swipe the message to the left; select **Forward.**
2. Inside the message, select the **three ellipses** in the upper-right corner; select **Forward Thread.**
3. To forward a single message within the thread, **long-press** the message; select **Forward Message.** You can forward text, audio, or photos.
4. **Search** for the person to send the message to.
5. **Click** on the recipient's name.
6. Select **Yes** to confirm that you want to forward the message thread.



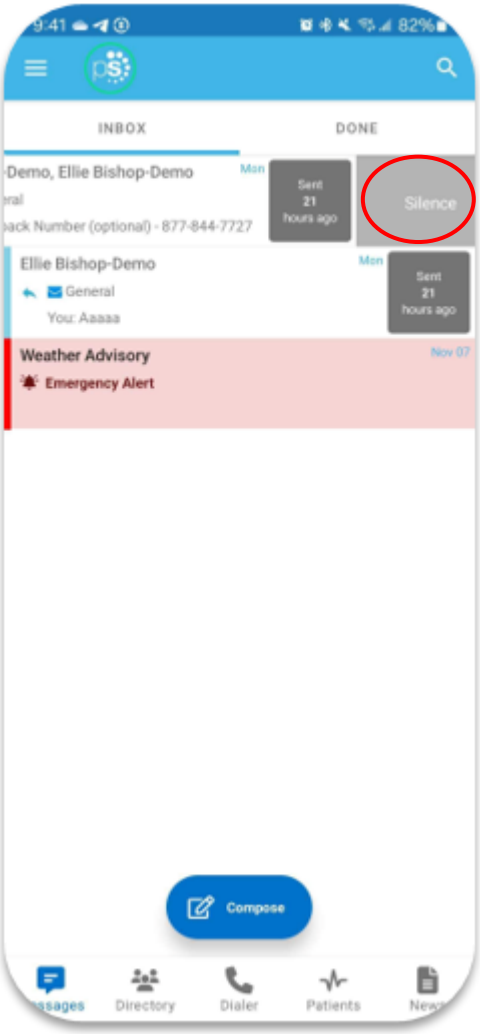


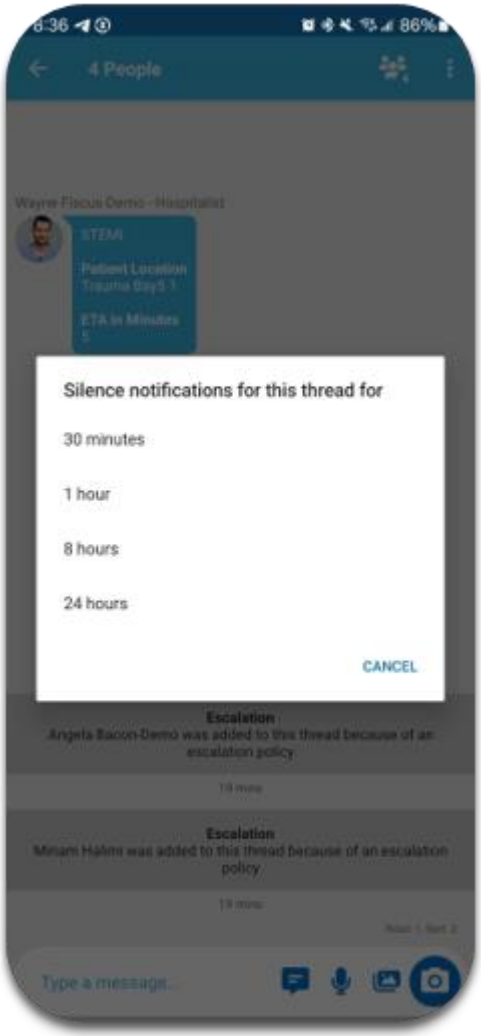


Silencing a Message Thread

To stop all alerts for a specific message, you can silence the message.

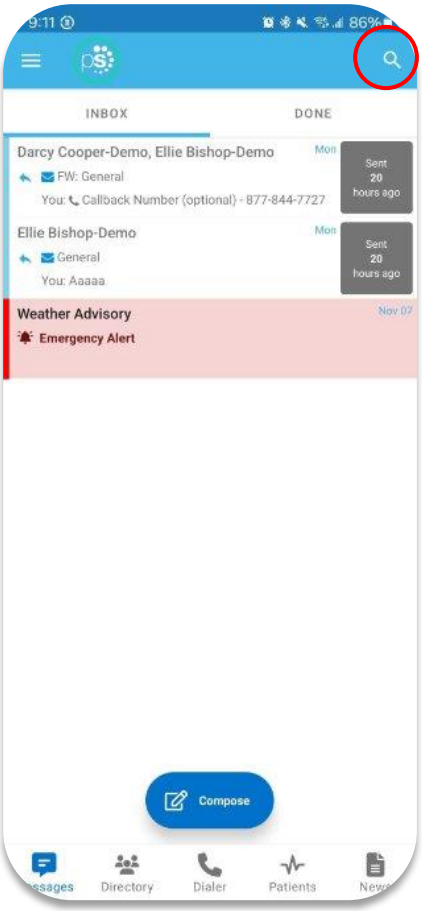
1. From the main **Messages** tab, swipe the message to the left; select **Silence**
2. Inside the message, select the **three ellipses** in the upper-right corner; select **Silence**.
3. Select the amount of time you wish the silence your alerts.





Searching Your Messages

1. The **top search icon** allows you to search your Messages for a specific message.

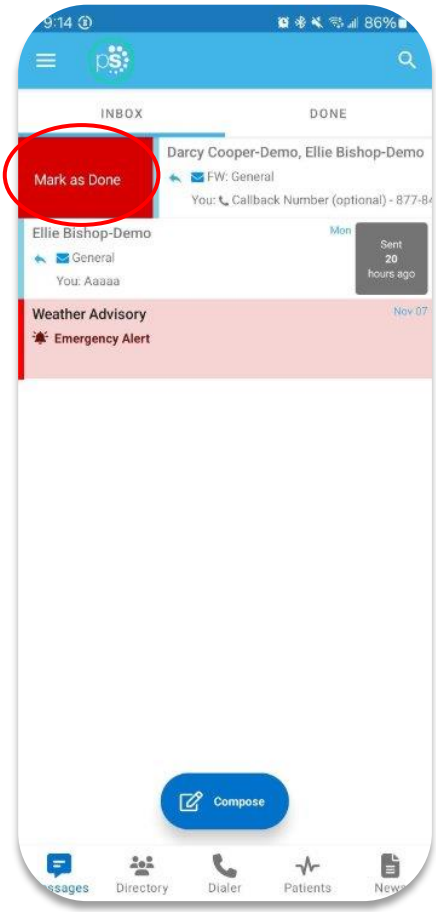


Marking Your Message As Done

When you no longer need the message to be active in the Inbox tab of your Messages, you can now archive them to the **Done** tab of your Messages.

1. From the main **Messages** tab, swipe the message to the right; select **Mark as Done.**

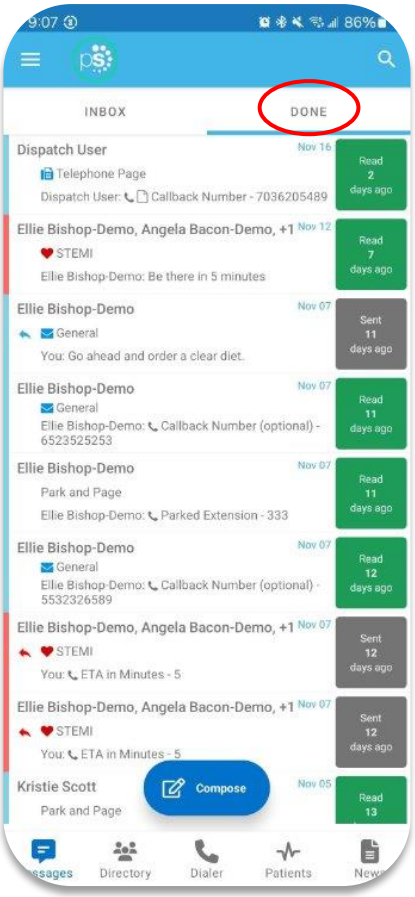
Note: A message must be read before it can be marked as done.



Marking Your Message As Done *continued*

2. All messages marked as done can be found in the **Done** tab of your Messages.

Note: A message must be read before it can be marked as done.



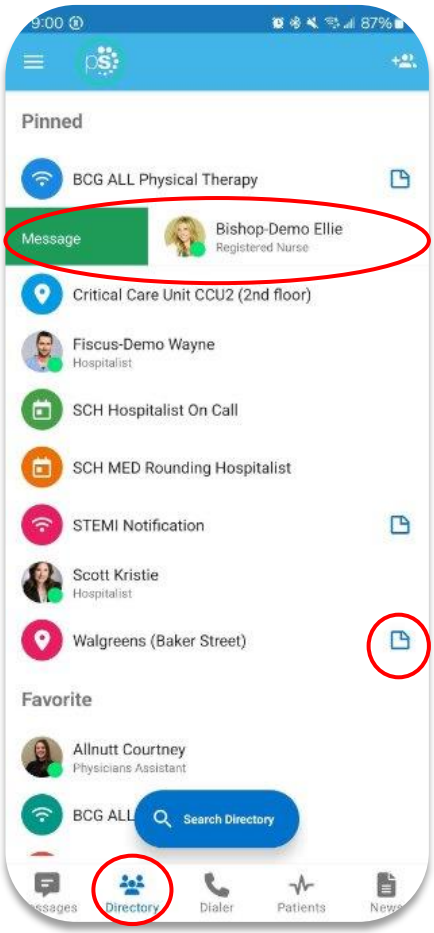
Directory

The Directory tab is where all contacts and groups can be accessed.

1. Select **Directory** to see the full list.
2. Along the left side of each contact are icons that designate the type of contact.

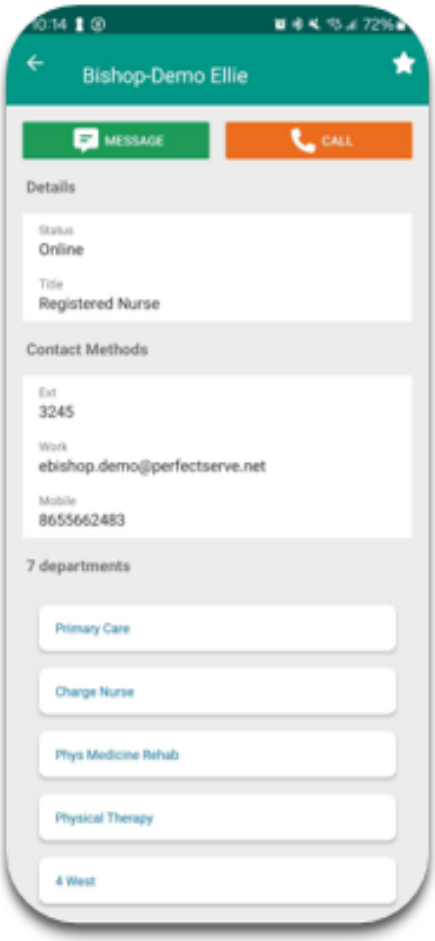
Icon	Message Status
	Schedule Paging Group
	Broadcast Paging Group
	Group

   a. **Pinned Contacts** are contact favorites indicated for an individual, a specific department, or assignable role.
   b. **My Favorites** are contacts marked as favorites from inside the directory tab by the user.
   c. **Local Group** are personal groups created by the user and are only seen in the directory tab of their mobile application
   d. **Recently Contacted** are contact you recently contacted either through message or call.
   e. **Notes** are indicated on the far right of each contact with a icon, *if there are any*.
   f. **Swipe left** on a contact to instantly call or compose a message.
   g. **Tap** on a contact to preview the contact's details.



Contact details

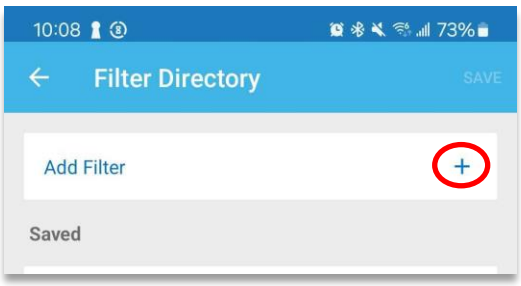
1. Inside the contact's detail you can review the following:
   - Title
   - Organization affiliation
   - Department(s) the user belongs to, if any
   - Contact methods and notes
2. Select **message** to begin composing a message to the contact.
3. Select **call** to initiate a call to the contact.

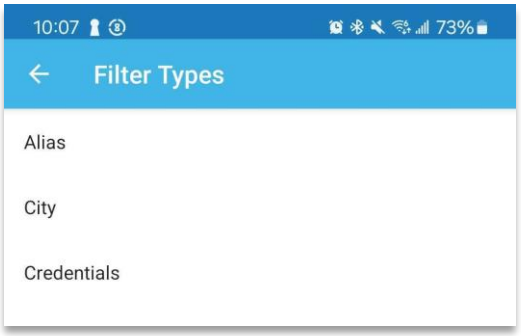


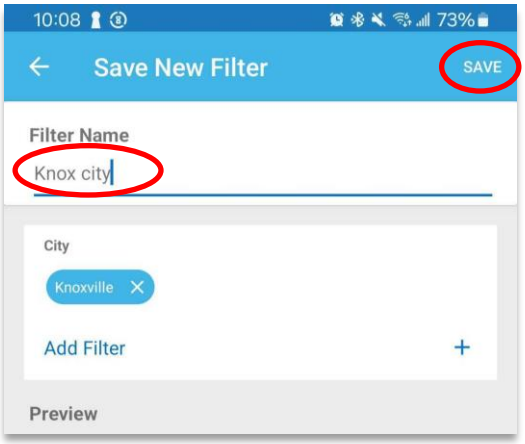
Searching and Filtering Options

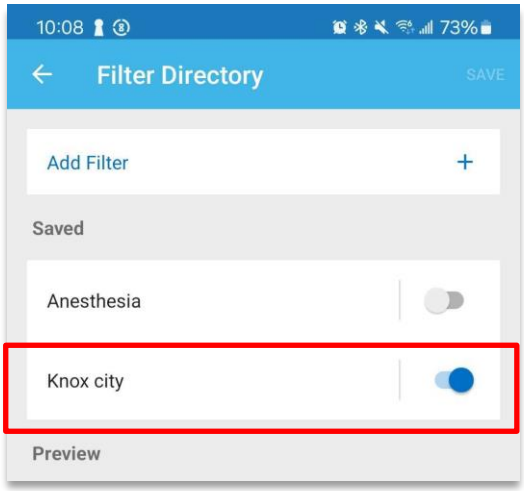
Find a contact you need quickly and easily with search and filters. You can use any of these features independently, or you can combine them.

1. Begin to search for a contact so that the Filter option will appear, select **Filter.**
2. Select **Add Filter** to narrow results by Alias, Credentials, Department, Location, Market, Specialty, Title, or Type.
3. Continue to add as many additional filters as needed.
4. Click **Save** once all filters have been selected.
5. Name the new filter so that it can be used easily in the future.
6. When finished, click **Save**.
7. The **filter** will appear under the search bar when in use.
8. When the filter is not needed, **click** the filter; **toggle** the saved filter off.





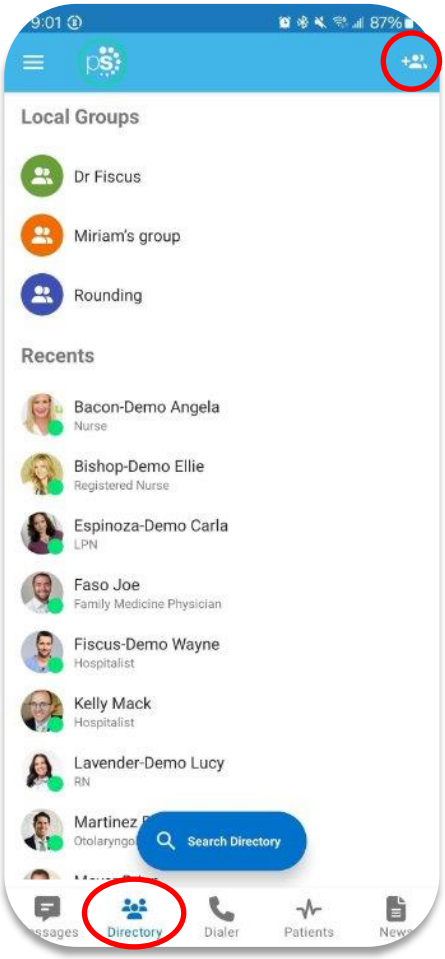


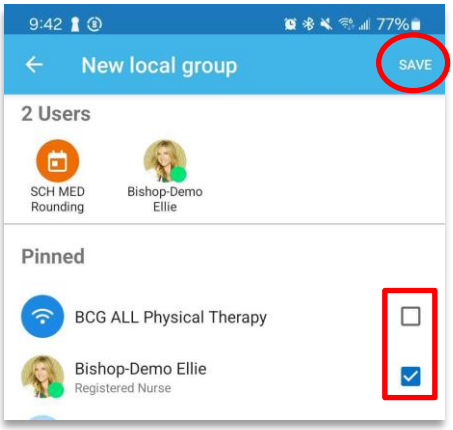


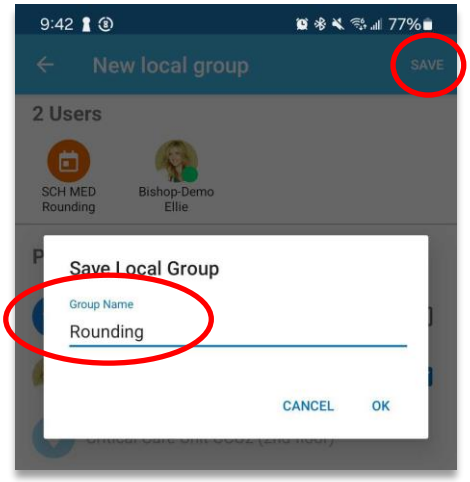
Creating a Group of Contacts

1. To create a Group, click **Directory**; then, select the **Add** symbol.
2. Select **New Group.**
3. **Name** your group.
4. Select **Add Member** and add recipients by searching for each contact individually; select their name to add them to the group.
5. When finished, click **Save.**

*Your new saved group will appear under **"Local Groups".***

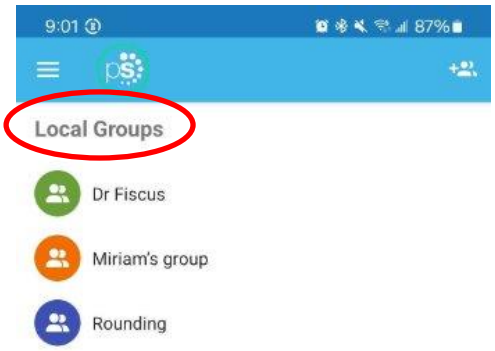


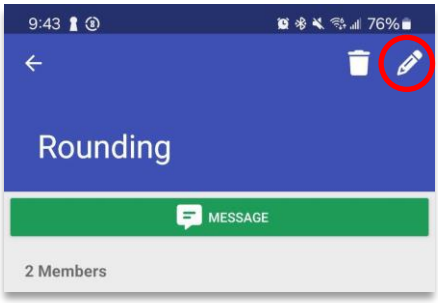


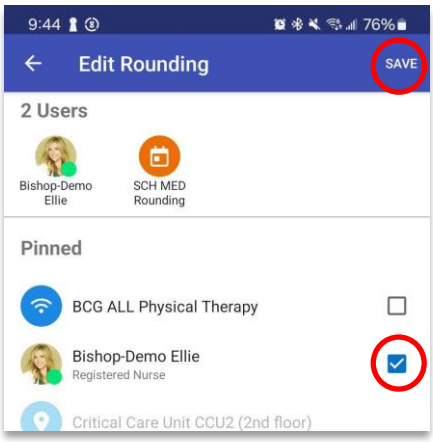


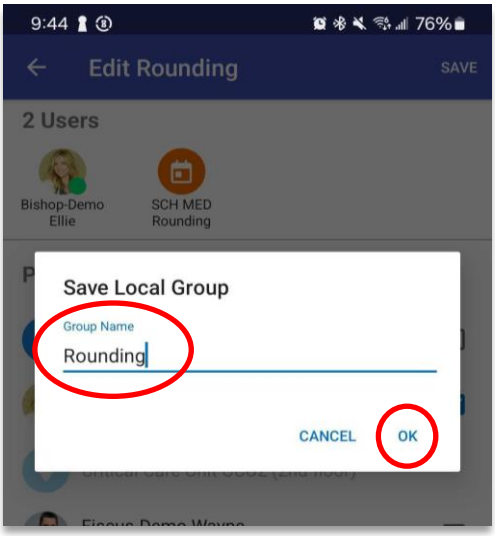
Editing Saved Groups

1. Select **Directory**, scroll to **Local Groups** and **select** the group you want to edit.
2. Select the **pencil** in the upper-right corner.
3. To change the name of the group, select the pencil next to the current name and use the keyboard to edit.
4. To add a new group contact, search for and select desired recipients.
5. To remove a group member, search for and unselect the recipient.
6. When finished, press the **Save** button in the upper-right corner.
7. You will then have the option to edit the group name; click **Ok** when done.





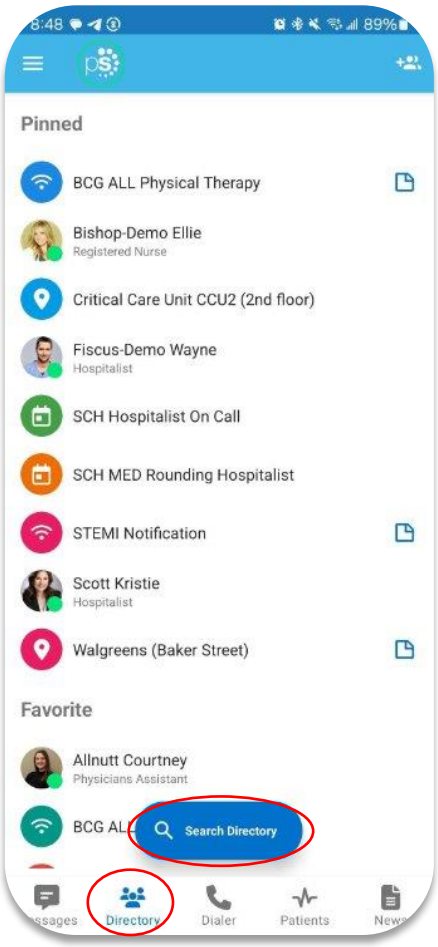


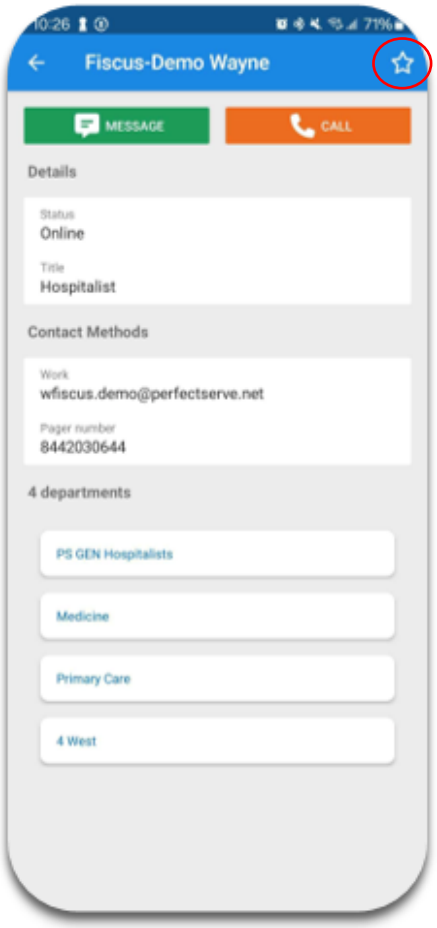


Adding a Favorite

Favorites allows you to create a shorter list of your most frequently contacted. To add a favorite:

1. Within **Directory**, search for the contact.
2. Click on the **contact** to open the contact's details.
3. Click the **star** icon in the top right corner.
4. To view and contact a Favorite, scroll to the **Favorite** in the Directory tab.

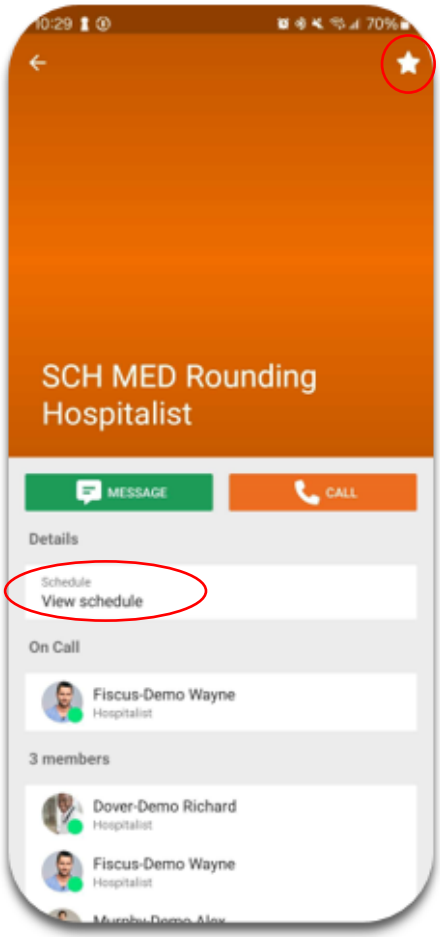




Schedule Group

On Call gives you access to view who is covering call. You may have one or many schedules to choose from and all changes are applied immediately

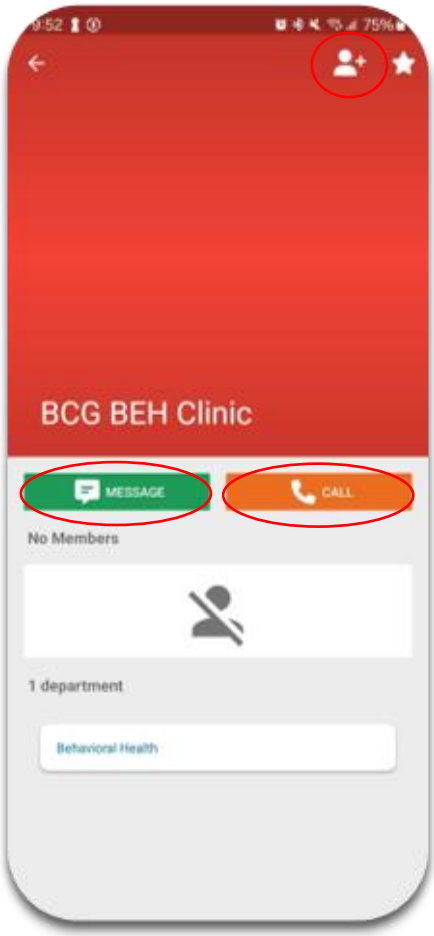
- **On-Call** – Indicates who is covering call
- **Members**– A list of all members that cover call.
- **View Schedule** – See a view of the current schedule.
- **Favorite** – Mark the schedule group as a favorite so that it appears in your **Favorites** of your Directory tab.



Broadcast Group

Broadcast Group is a paging group with a list of members to whom the message(s) can be sent at once. It works like a distribution list in any Enterprise email account

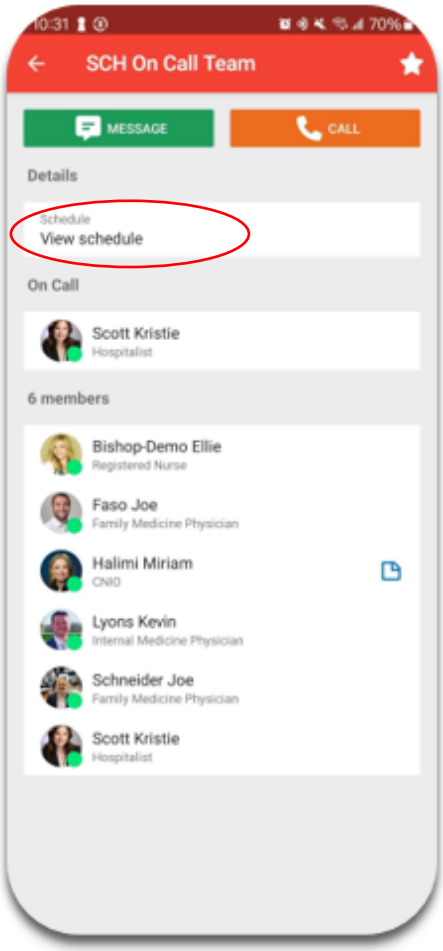
- **Message – Message all members in the broadcast group**
- **Call**– Call all members in the broadcast group.
- **Join** – Allows you to join the broadcast group
- **Members –** A full list of all contacts currently in the broadcast group.
- **Favorite** – Mark the broadcast group as a favorite so that it appears in your **Favorites** of your Directory tab.
- **Swipe left** on a member's name to call
- **Swipe right** to message that contact only.

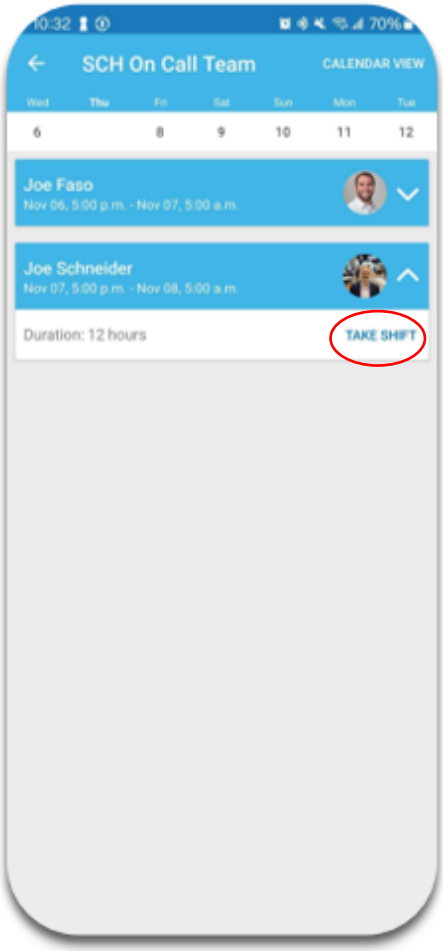


Take a Shift*

*This feature will only appear if the option is turned on for the schedule group.

1. Select a **Schedule Group** you wish to view.
2. Select **View Schedule.**
3. **Select** the date.
4. **Click** on the slot you wish to take.
5. Select **take shift**.
6. Click **Take** to confirm that you want to take the shift.





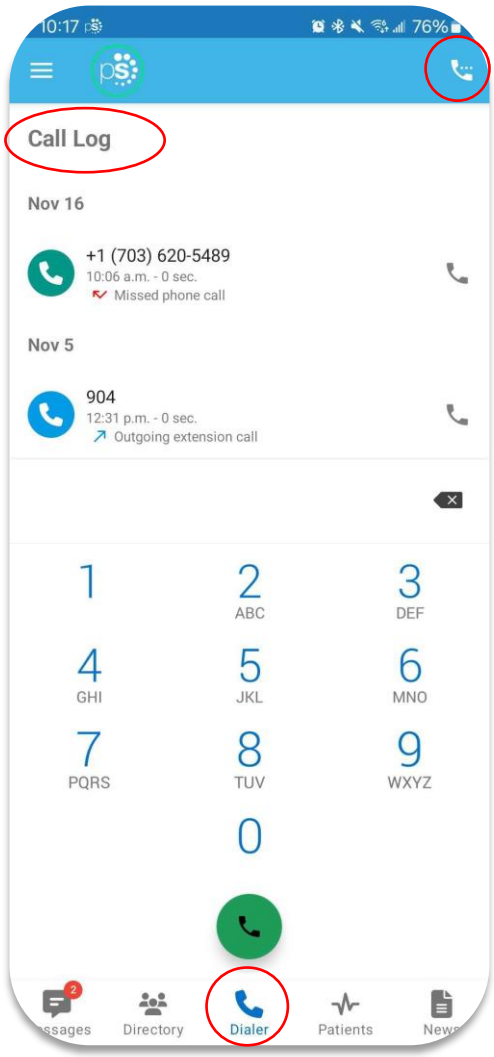
Dialer

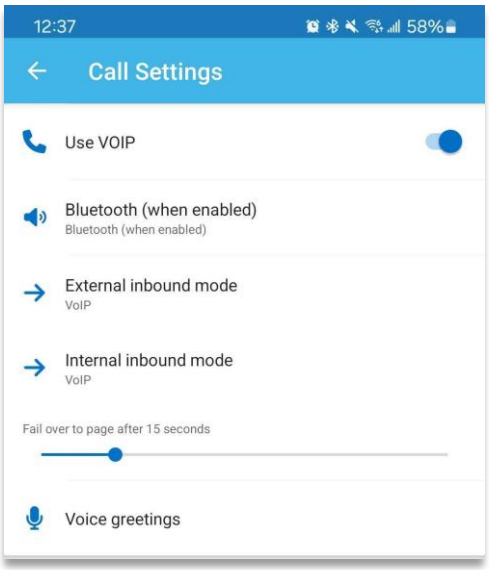
This feature provides a secure method for you to place outbound calls to patients and other providers.

- **Keypad** – Free form keypad to dial any 10-digit number
- **Call log** – A list of all recently dialed numbers
- **Settings** – Adjust your call settings preferences

PerfectServe Clinical Collaboration believes in protecting the privacy of the practitioners we serve. Therefore, to activate the caller ID mask functionality, all calls must be routed through the PerfectServe Clinical Collaboration exchange. Whether you use the keypad in **Dialer** or choose a contact by name, PerfectServe Clinical Collaboration will display your account's assigned dispatch number as the number you are calling. This indicates that the call is routing through the exchange to protect your ID.

Note: All calls placed through the PerfectServe Clinical Collaboration mobile app protect your caller ID.

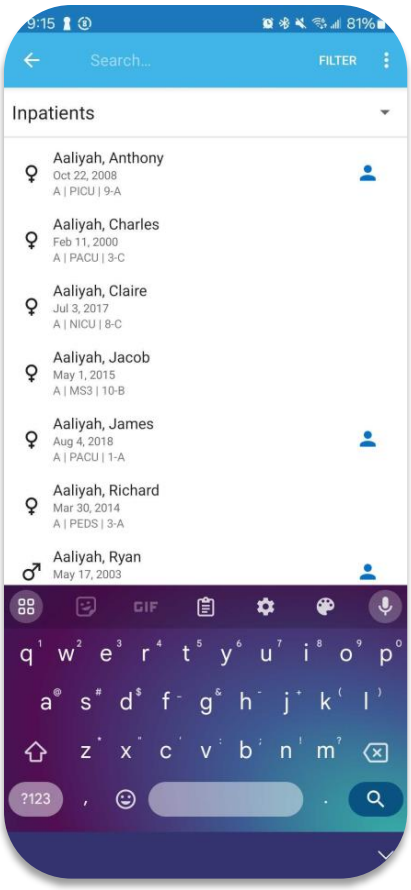




Patients*

*This option is only available to users who are given the proper privileges by their facility admin.

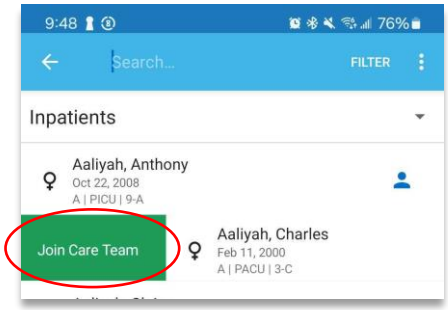
Within **Patients**, you can see patient details, access messages, notes, updates, contact members of the care team, and join or leave a patient's clinical team just by knowing the patient's name.



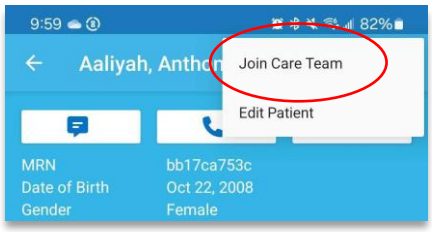
Viewing Patient Details

1. Select **Patients**.
2. Search for the patient to view the patient's clinical team
   - **My Patients** is the main view and shows patients that have you assigned on their clinical team.
   - **Search All Patients** to locate a patient that does currently have you as part of their clinical team.
   - **Sort** allows you to sort your view by name or location.
3. **Select** the patient from either **My Patients** or from the search results in **Search All Patients**.
4. In the patient you will see the following information:
   - **Patient Information** (e.g., MRN, DOB, Sex, and Encounter details)
   - **Messages** – all messages pertaining to this specific patient
   - **Care Team** – all members of the clinical team assigned to the patient

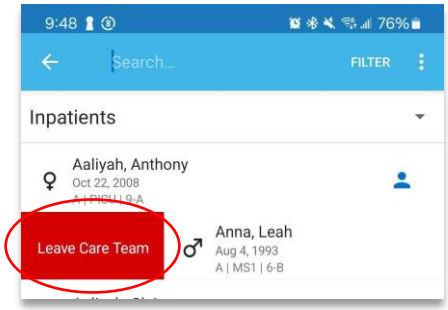
Joining a Patient's Care Team



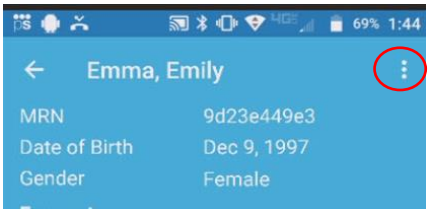
1. Select **Patients**.
2. Search for the patient to view the patient's clinical team using the **Search** bar or by clicking **Search All Patients**, then entering the patient's name.
3. **Swipe left** on the patient's name; select **Join.**
4. If you wish to confirm the patient's details prior to joining; select the patient.
5. Click the **three ellipses** and select **Join Care Team.**



Leaving a Patient's Care Team

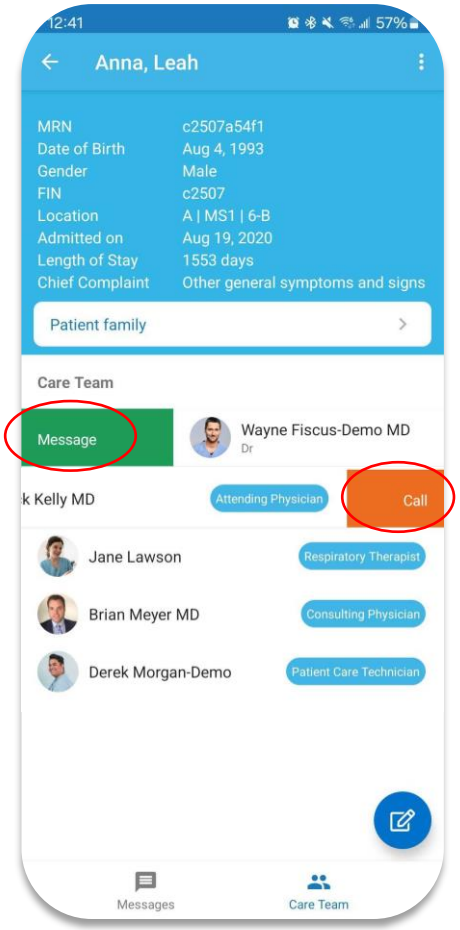


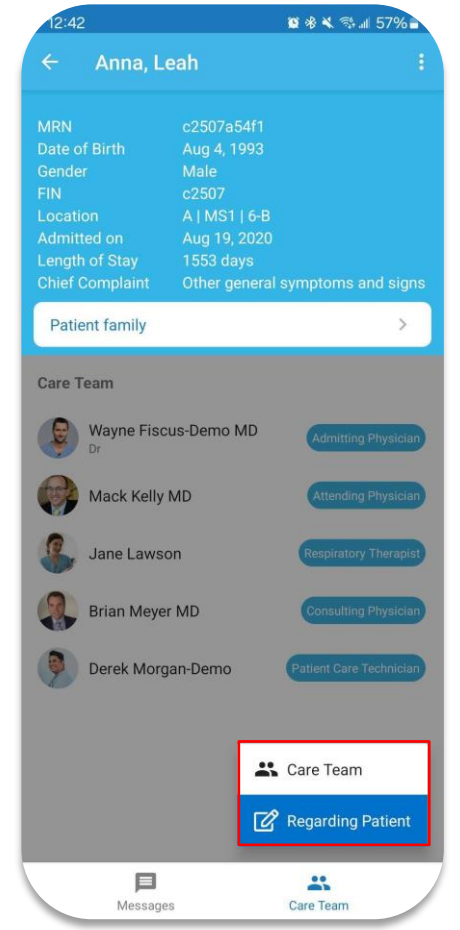
1. Select **Patients**.
2. Locate the patient in your **My Patients**.
3. **Swipe left** on the patient's name; select **Leave.**
4. If you wish to confirm the patient's details prior to joining; select the patient.
5. Click the **three ellipses** and select **Leave Care Team.**



Contacting a Patient's Care Team

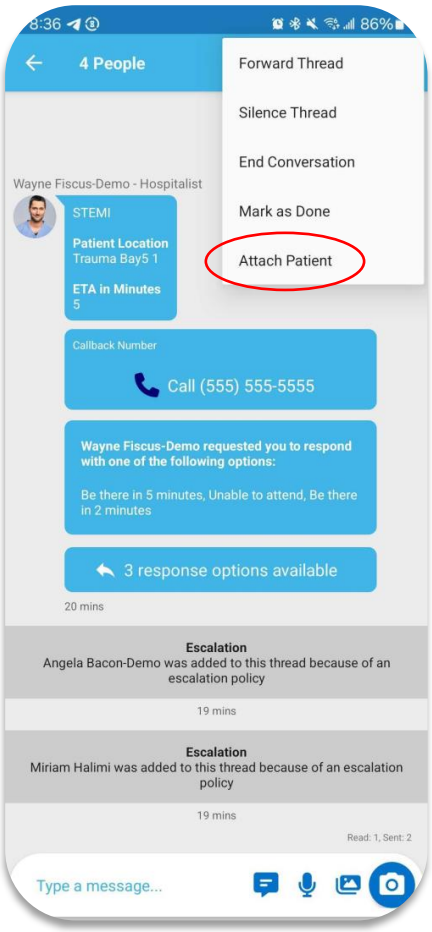
1. Select **Patients**.
2. **Select** the patient.
3. Click **Care Team** in the patient's details view.
4. To contact just one individual of the Care Team:
   - **Swipe left** on the individual's name to message.
   - **Swipe right** on the individual's name to call.
5. To message the entire Care Team; select **Message Care Team.**

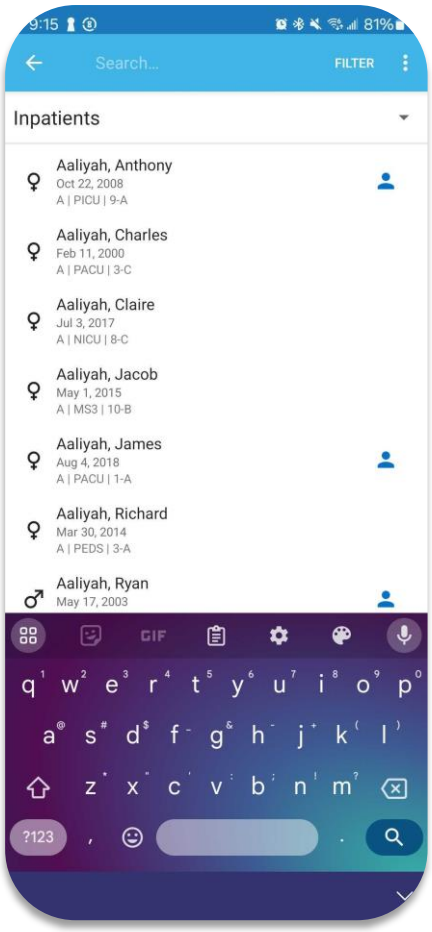




Associate a Patient with Existing Message

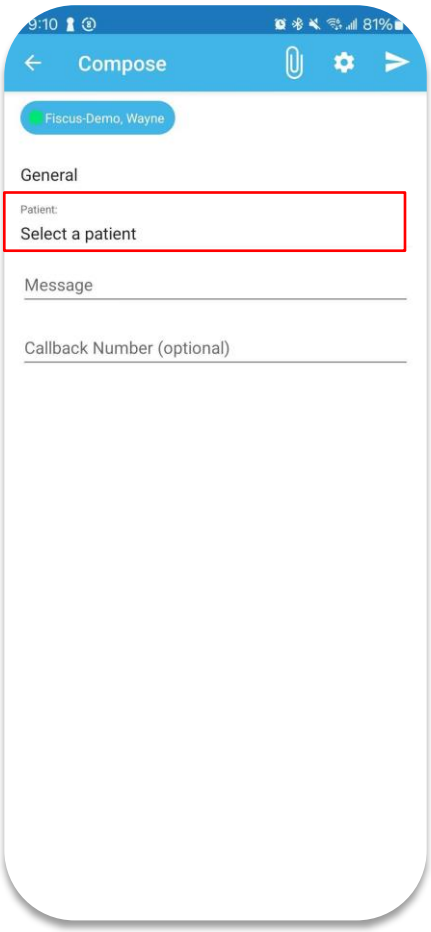
1. Select **Messages**.
2. **Select** the existing message.
3. Select the **three ellipses** in the top right corner; select **Associate With Patient**.
4. Select the **patient.**
5. The patient's information will appear at the top of the message.

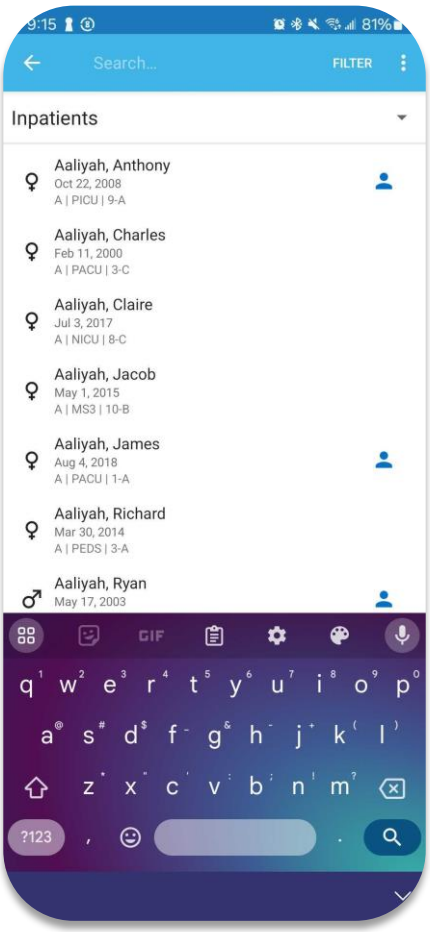




Associate a Patient with a New Message

1. Select **Messages**.
2. **Compose** a new message.
3. **Select** a message type that has a patient centric field.
4. Select the **patient field.**
5. **Select** the patient.
6. Complete the message; then **send**.





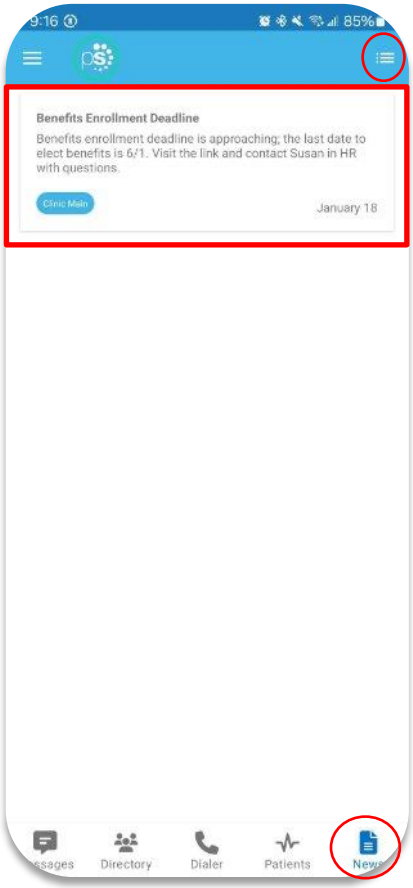
News & Announcements*

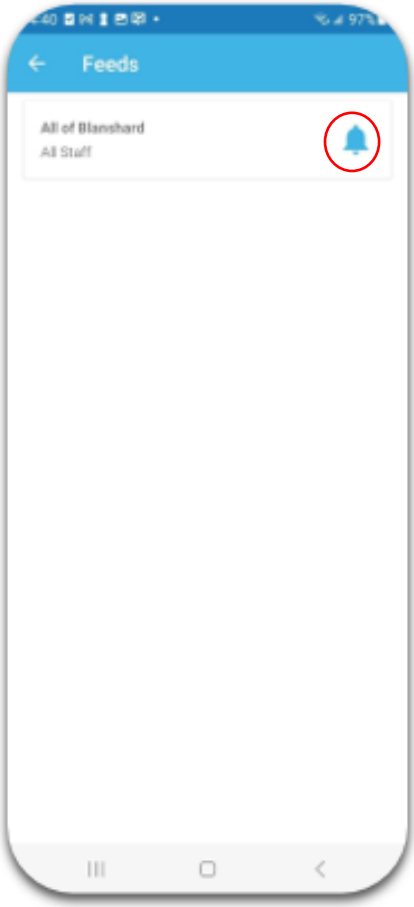
*This feature will only appear if the option is being used by your facility.

The News & Announcements section provides the ability to broadcast information out to specific users, departments or to the entire account. Information shared in these feeds are typically informational and are not critical in nature.

1. Select **News**.
2. **Select** the message to view.
3. Select the **sub-navigation menu icon** in the top right to turn alerts settings of any messages in the News tab.
4. Select the **blue bell icon** to turn to turn alerts on/off for any messages in the News tab.

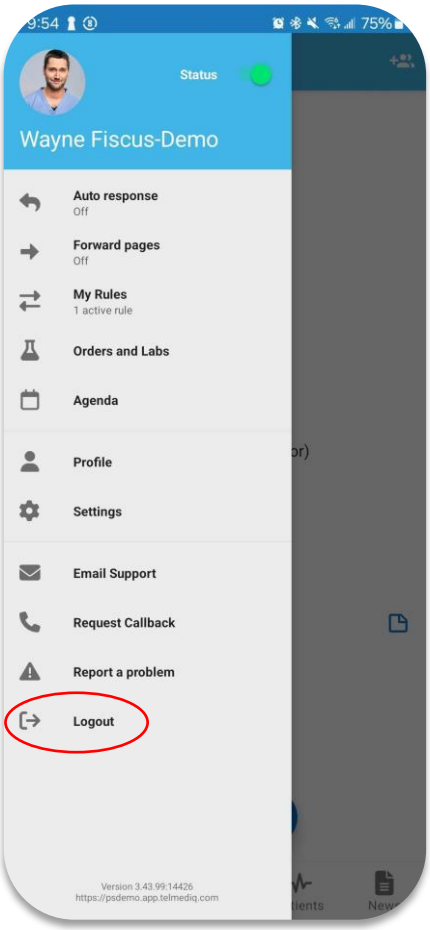
Note: Alerts can only be turned on/off if the feed is non-mandatory.





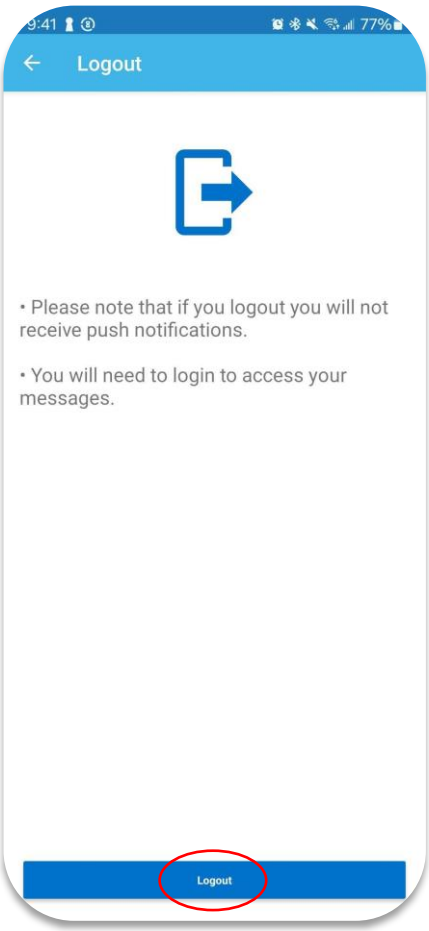
Logout

1. To log out of the PerfectServe Clinical Collaboration application, select **Logout** from the main menu.
2. The PerfectServe Clinical Collaboration application will display a confirmation window.
3. Select **Logout** to proceed or exit the confirmation window to cancel.



Note: Logging out of the app means that you will no longer received push notifications or messages to the app until you log back in.

All personal information will remain confidential and secure, neither shared nor sold. View our privacy policy at www.telmediq.com.



Frequently Asked Questions

1. **Will my organization have a single point of contact within Support?**

   All PerfectServe Clinical Collaboration clients are supported by a shared pool of resources within a tiered support desk model. By utilizing internal best practices and a communal knowledgebase, we can standardize our support across multiple resources and clients to provide the most efficient service possible for our users.

2. **What are PerfectServe Clinical Collaboration's Support hours?**

   PerfectServe Clinical Collaboration's support is available 24/7, 365 days.

How To Contact PerfectServe Clinical Collaboration Support

1.877.844.7727 x1

Support@Telmediq.com

https://support.telmediq.com/hc/en-us

Open PerfectServe Clinical Collaboration Mobile Application. Expand the side menu and select **Email Support** or **Request Callback.**