

Welch Allyn Home App
and Clinic Portal Training



Table of Contents

ADMIN

Administrator - Getting Started

[Registering the Clinic](#)

[Logging In for the First Time/ Logging Out](#)

[Changing Password in the Portal](#)

[Changing the User Profile](#)

[Revoking Consent to Participate in Surveys](#)

Administrator – Managing the System (Administrators)

[Accessing the Admin Panel](#)

[Reviewing and Updating Clinic Information](#)

[Setting Clinic-wide Patient Risk Ranges](#)

[Creating Users](#)

[Creating Users – System Users](#)

[Creating Users – Patients](#)

[Creating Users – Clinician/ Providers](#)

[Editing Users - Information](#)

[Editing Users - Setting a Password](#)

[Deleting Users](#)

[Clinic Report](#)

[Admin Panel Dashboard](#)

[Audit Logs](#)

PATIENT

[Patient Journey](#)

[Patient Device Requirements](#)

Patient – Getting Started with Accounts

[3 Ways How a Patient Account is Created](#)

[Existing Patient](#)

[New Patient – Patient Sign-up](#)

[New Patient – Created by Admin](#)

Patient – Working with Devices

[Pairing a Blood Pressure Monitor or Weight Scale](#)

[Adding a Device](#)

[Removing/ Unpairing a Device](#)

Patient – Working with Readings

[Taking a Reading on a Paired Blood Pressure Device or Scale](#)

[Taking a Reading on a Paired Blood Pressure Device](#)

[Taking a Reading on a Paired Weight Scale](#)

[Entering Readings Manually – Option 1](#)

[Entering Readings Manually – Option 2](#)

[Entering Readings Manually – Option 3](#)

[Reviewing Readings](#)

[Editing Manually Logged Readings](#)

[Editing Synced Readings](#)

Patient – Clinician Followers

[Accepting a Follower](#)

[Unsubscribing a Follower](#)

Patient – Account Details

[Changing Units of Measure](#)

[Editing a Profile](#)

[Changing a Password and Logging Out of App](#)

[Deleting an Account](#)

Patient – The Patient Portal

Patient – Accessing the Patient Portal

[Logging In & Logging Out](#)

[Changing a Forgotten Password](#)

[Changing a User Profile and Password Inside the Portal](#)

Patient – Reviewing Information in the Patient Portal

[Updating Health Readings on the Portal](#)

[Updating Health Readings on the Portal – Accepting or Rejecting a Reading](#)

[Changing Chart Views of Readings on the Portal](#)

[Exporting Health Readings](#)

[Uploading Files](#)

Table of Contents

CLINICIAN / PROVIDER

[Clinician/ Provider Journey](#)

Getting Started

[User Privileges](#)

[Logging in and logging out](#)

[Changing Password in the Portal](#)

[Changing the User Profile](#)

[Revoking Consent to Participate in Surveys](#)

Managing the System (Clinicians)

[Accessing the Admin Panel](#)

[Creating Users - Patients](#)

[Setting a Password for Patients](#)

[Deleting a Patient](#)

Dashboard

[Dashboard](#)

[Risk Level Charts](#)

[Readings Table](#)

Patients

[Patients](#)

[Patients Health Tab](#)

Inviting Patients

Patient Profile

[Health/vitals Readings](#)

[Accepting or Rejecting a Reading](#)

[Changing Chart Views of Readings](#)

[Log Readings Manually](#)

[Review and Upload Documents](#)

[Upload Files](#)

[View Files](#)

[Memo](#)

[Save or Discard a Timed Patient Review Session](#)

[Viewing the Time Log and Notes](#)

Risk Ranges & Notifications

[Setting General Risk Notification for Patients](#)

[Changing Risk Notification for Individual](#)

[Patients](#)

[Changing Risk Ranges for Individual Patients](#)

TECH SUPPORT

Technical Support – Escalation Process

[Escalation Path](#)

[Submission of Ticket](#)

[Acknowledgment of Ticket](#)

[Ticket Update](#)

[Ticket Resolution](#)

Technical Support – Troubleshooting Tips

[Clinical Registration](#)

[Clinician/ Provider Account](#)

[Patient Sign-up and Acceptance of Follow Request](#)

[Updates](#)

[Bluetooth](#)

[Device Pairing and Syncing](#)

[Internet Connection on the Phone](#)

[Patient Account Issues](#)

[Account-related Email](#)

Resources

[Self-help Links](#)

SALES REP

Sales Rep - Demo

[Demo Clinic](#)

[Dashboard](#)

[Limitation](#)

Sales – Sign-up a Practice Owner

[Sign-Up/ Register a New Clinic](#)

Sales Rep - Resources

[Sales Rep: Important Links](#)



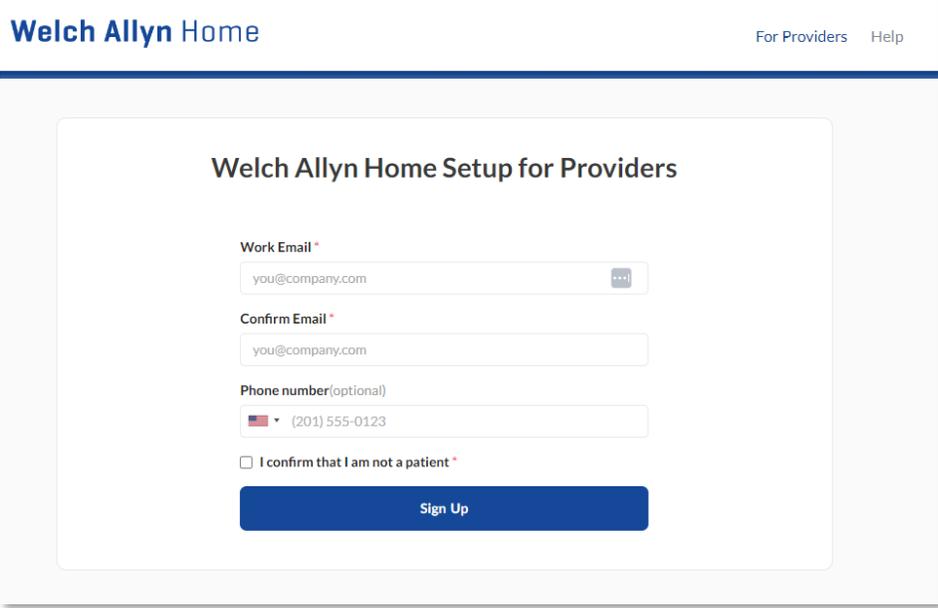
Admin

Registering the Clinic

To be part of the Welch Allyn Home network, a medical practice must be registered as a Clinic.

The Welch Allyn Home representative will provide the URL to the Clinic Set-up:
https://clinic.welchallynhome.com/pages/clinic_trial?template_code=wahprovider.

Existing Welch Allyn Home Clinics will be migrated to the New Welch Allyn Home Clinic Portal

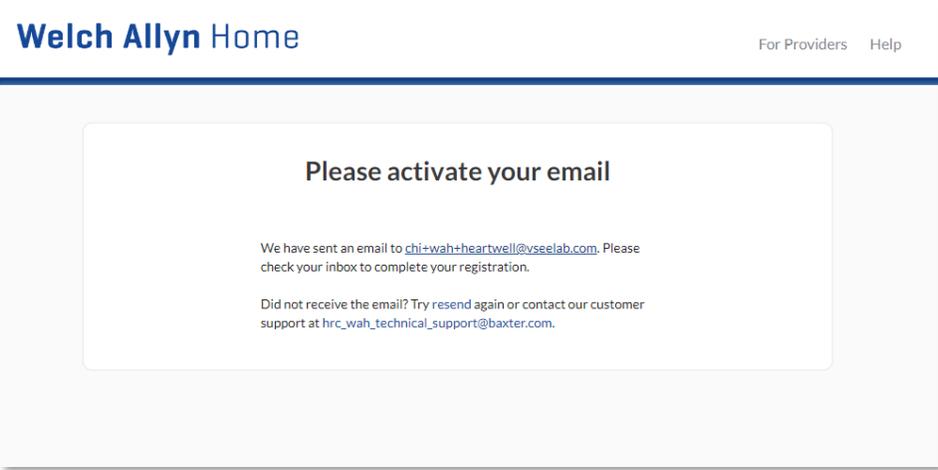


The screenshot shows the 'Welch Allyn Home Setup for Providers' registration form. It includes fields for 'Work Email', 'Confirm Email', and 'Phone number (optional)'. There is a checkbox for 'I confirm that I am not a patient' and a 'Sign Up' button.

Enter the email address to be used and re-enter to confirm the correct email address.

Click the checkbox to confirm that the user is not a patient.

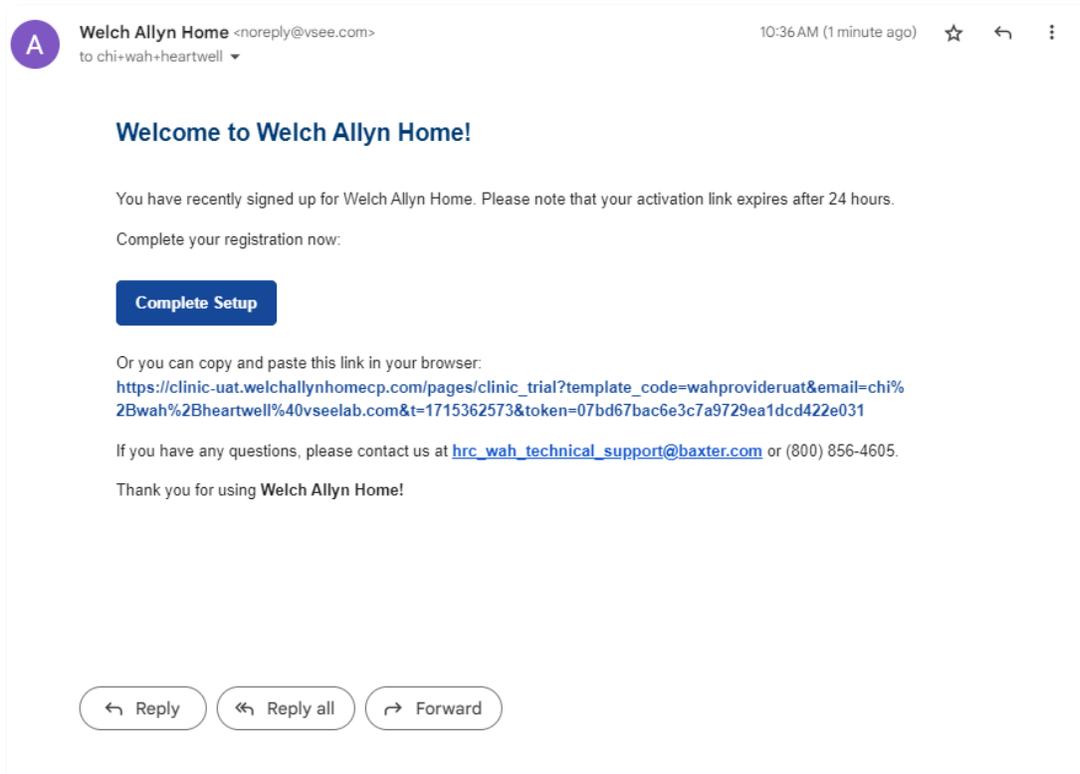
Click **Sign Up**



The screenshot shows a message titled 'Please activate your email'. It states: 'We have sent an email to chi+wah+heartwell@vseelab.com. Please check your inbox to complete your registration.' It also provides instructions: 'Did not receive the email? Try resend again or contact our customer support at hrc_wah_technical_support@baxter.com.'

A popup will appear instructing the user to check their email to complete their registration.

Registering the Clinic – cont'd

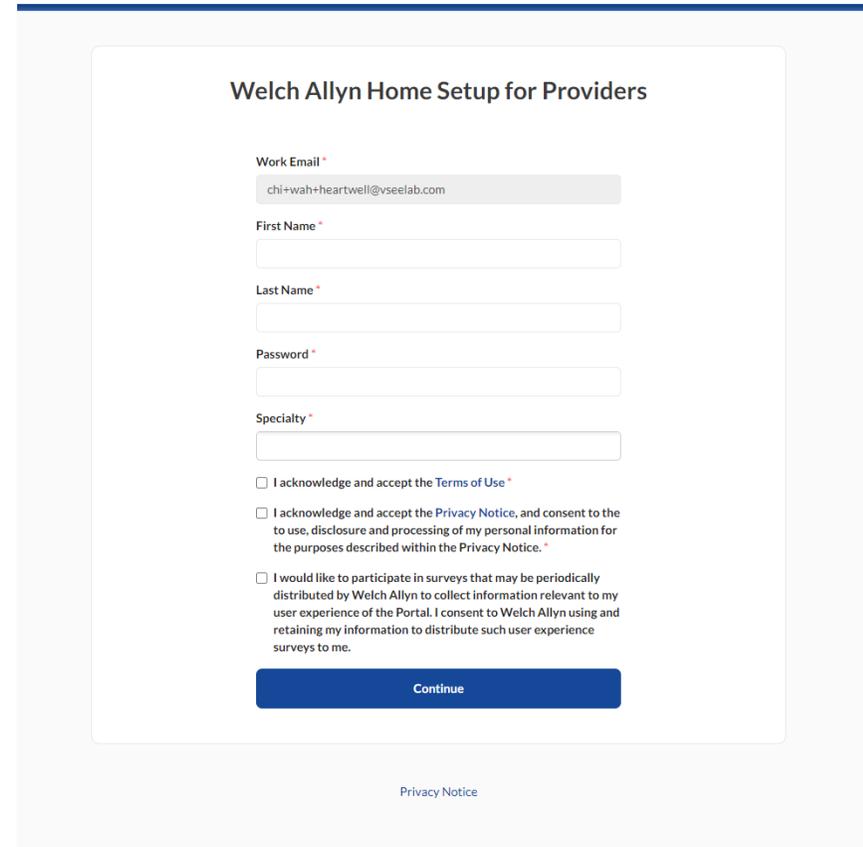


Check Email. If the email is not in the Inbox, check the Spam folder.

Click **Complete Setup**.

Welch Allyn Home

For Providers Help



Fill in all required fields.

Set a password that meets the requirements

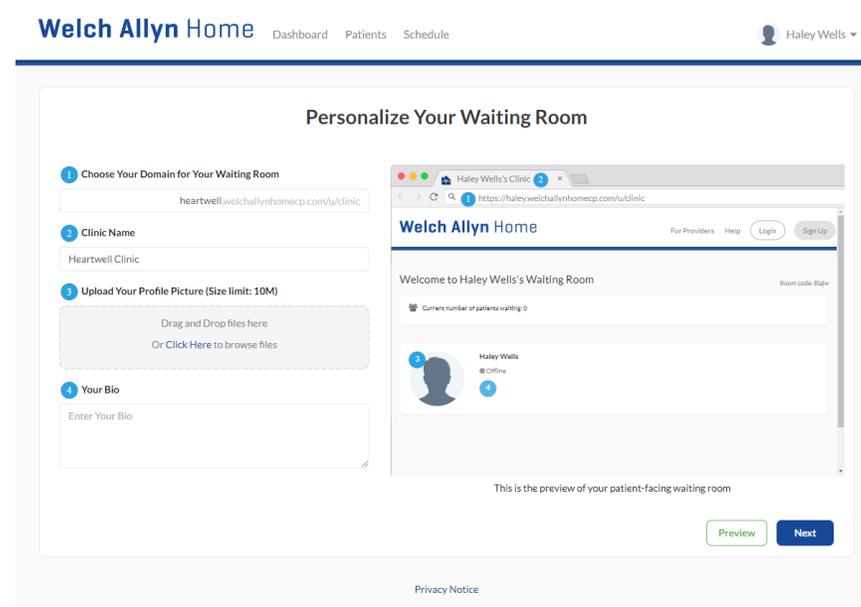
Review the Terms and Conditions and click the boxes to agree with the Terms of Services and Survey Participation

Click **Continue**

Registering the Clinic – cont'd

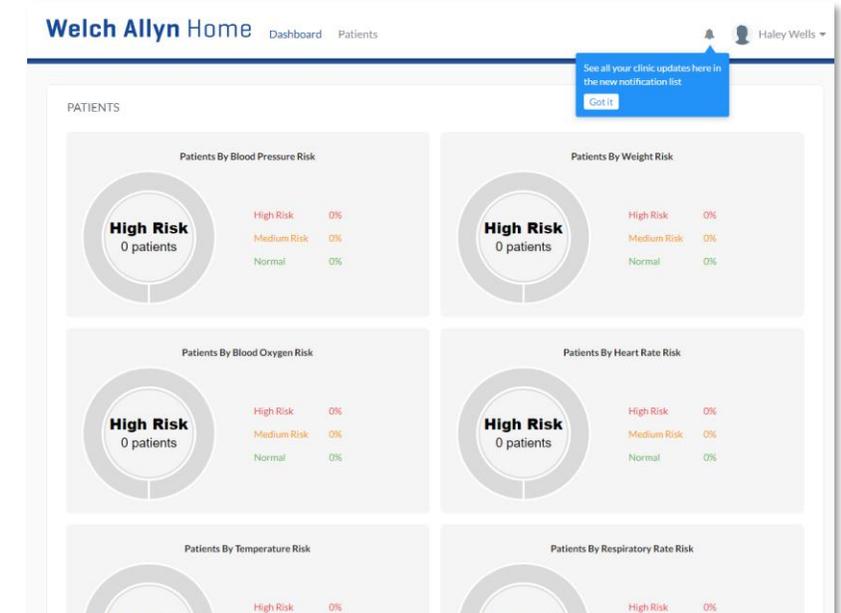
The one who signs up for the Clinic becomes the Administrator by default.

The Administrator has both Provider and Admin access.



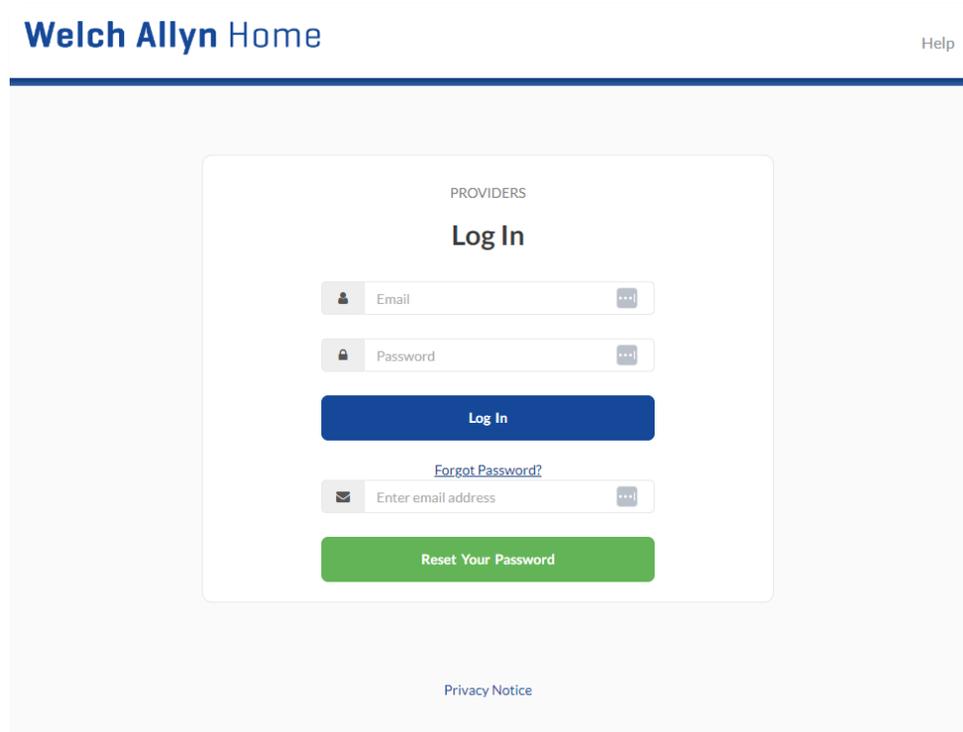
The Administrator can personalize the Waiting Room of the Clinic. All fields are optional to edit.

Note: The Domain and Clinic Name cannot be edited once **Next** is clicked.



The Dashboard screen appears.

Logging In for the First Time



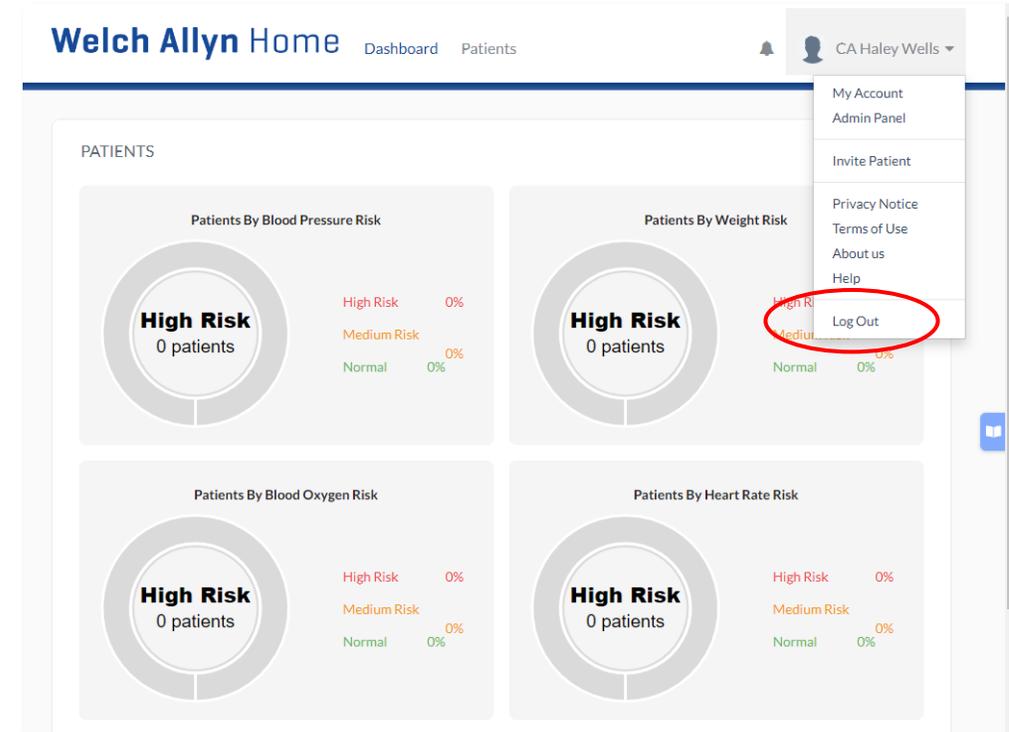
The screenshot shows the 'Welch Allyn Home' login page. At the top left is the 'Welch Allyn Home' logo and 'PROVIDERS' text. At the top right is a 'Help' link. The main content area is titled 'Log In' and contains a form with the following elements: an 'Email' input field, a 'Password' input field, a blue 'Log In' button, a 'Forgot Password?' link, an 'Enter email address' input field, and a green 'Reset Your Password' button. At the bottom center is a 'Privacy Notice' link.

Log in with the email address and password used to sign up for the Clinic

To Reset the Password:

Click **Forgot password**, enter the email address and click **Reset Your Password**. Follow instructions in the email.

Logging Out



The screenshot shows the 'Welch Allyn Home' dashboard. At the top left is the 'Welch Allyn Home' logo. At the top right are 'Dashboard' and 'Patients' tabs, a notification bell, and a profile menu for 'CA Haley Wells'. The profile menu is open, showing options: 'My Account', 'Admin Panel', 'Invite Patient', 'Privacy Notice', 'Terms of Use', 'About us', 'Help', and 'Log Out'. The 'Log Out' option is circled in red. The main content area is titled 'PATIENTS' and contains four risk assessment charts: 'Patients By Blood Pressure Risk', 'Patients By Weight Risk', 'Patients By Blood Oxygen Risk', and 'Patients By Heart Rate Risk'. Each chart shows 'High Risk' with '0 patients' and '0%' for all risk levels (High Risk, Medium Risk, Normal).

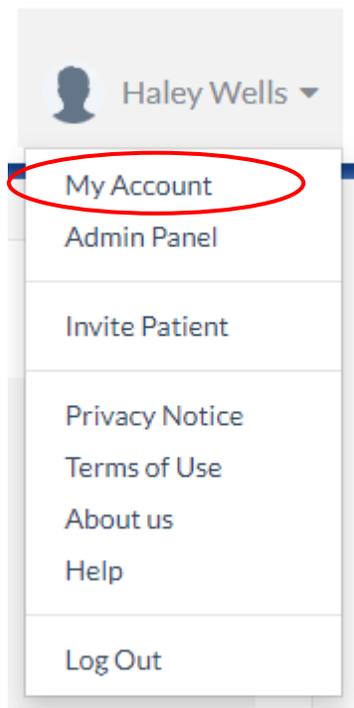
Click Profile Menu on the far right of the menu bar and click **Log out**.

The *Welch Allyn Home Log in* screen appears. Logging out was successful.

Changing Password in the Portal

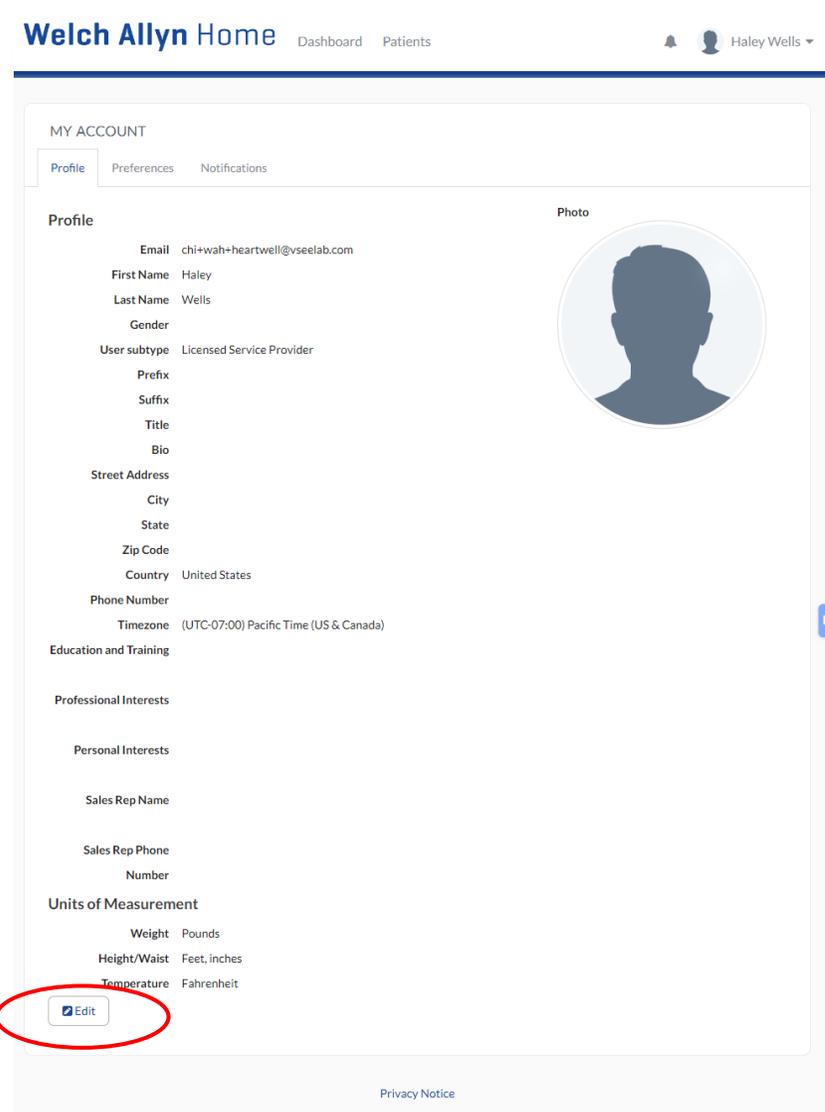
The user can also change their password once they have logged in the Clinic Portal.

Unlike Reset Password, the user will be required to enter their current password.



Click name on the right side of the menu bar.

Click **My Account**.



Under the Profile tab, click **Edit**. The password fields do not appear until Edit is clicked.

Changing Password in the Portal – cont'd

Welch Allyn Home Dashboard Patients Haley Wells

MY ACCOUNT

Profile Preferences Notifications

Profile

Existing Password

New Password *Password requirements*

Confirm New Password

Email chi+wah+heartwell@vseelab.com

First Name Haley

Last Name Wells

Gender Select Gender

Prefix e.g Mr, Mrs, Dr

Suffix e.g M.D., R.N., N.P.

Title e.g Family Therapist...

Bio

Photo

Drag file to upload or click to select a file (size limit:100M)

Type the existing password.
Type the new password
Confirm new password

Professional Interests

Personal Interests

Sales Rep Name

Sales Rep Phone Number (201) 555-0123

Units of Measurement

Weight Pounds

Height/Waist Feet, inches

Temperature Fahrenheit

Cancel Update

Scroll down
Click **Update** to save the changes

Changing the User Profile

Profile information can be updated.

Follow the same initial steps on changing the password in the portal:

1. Click name on the right side of the menu
2. Click **My Account**
3. Under the Profile tab, click **Edit**

Note: There's no need to enter the password when updating the user profile

Welch Allyn Home Dashboard Patients Haley Wells

MY ACCOUNT

Profile Preferences Notifications

Profile

Existing Password

New Password Password requirements

Confirm New Password

Email chi+wah+heartwell@vseelab.com

First Name Haley

Last Name Wells

Gender Select Gender

Prefix e.g Mr, Mrs, Dr

Suffix e.g M.D., R.N., N.P.

Title e.g Family Therapist...

Bio

Photo

Drag file to upload or click to select a file (size limit:100M)

Street Address

City

State

Zip Code

Country United States

Phone Number (201) 555-0123

Timezone (UTC-07:00) Pacific Time (US & Canada)

Education and Training

Update the profile information using the editable fields

Professional Interests

Personal Interests

Sales Rep Name

Sales Rep Phone Number (201) 555-0123

Units of Measurement

Weight Pounds

Height/Waist Feet, inches

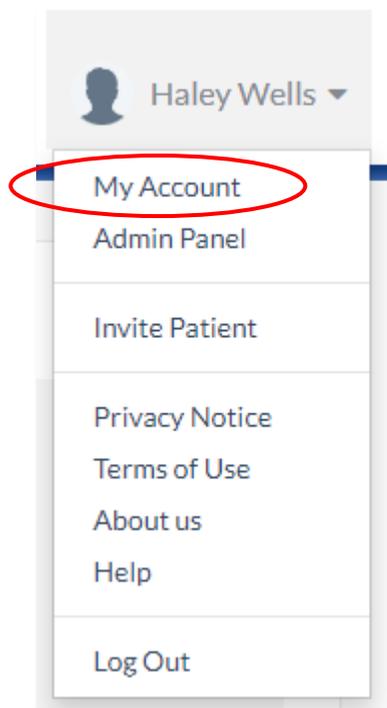
Temperature Fahrenheit

Cancel Update

Click **Update** to save the changes

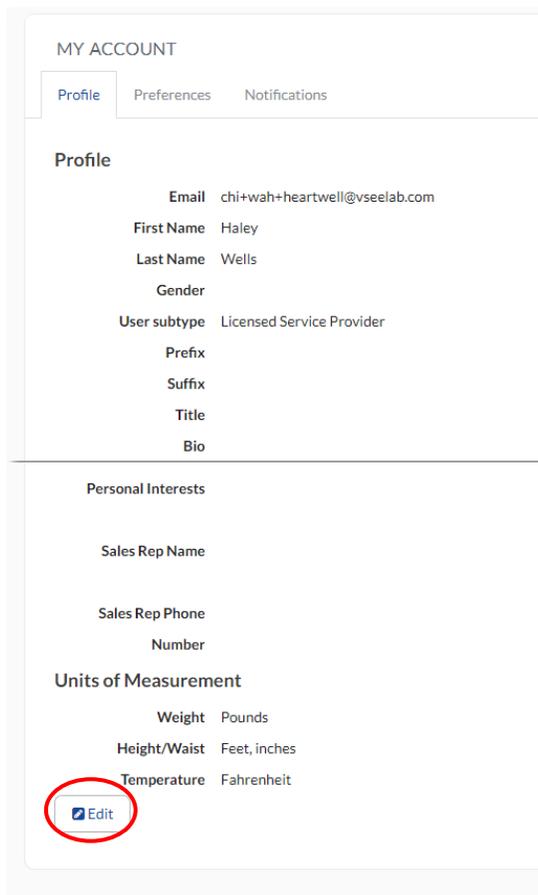
Revoking Consent to Participate in Surveys

A user who has given consent to participate to surveys during the sign-up process can opt out (or back in).

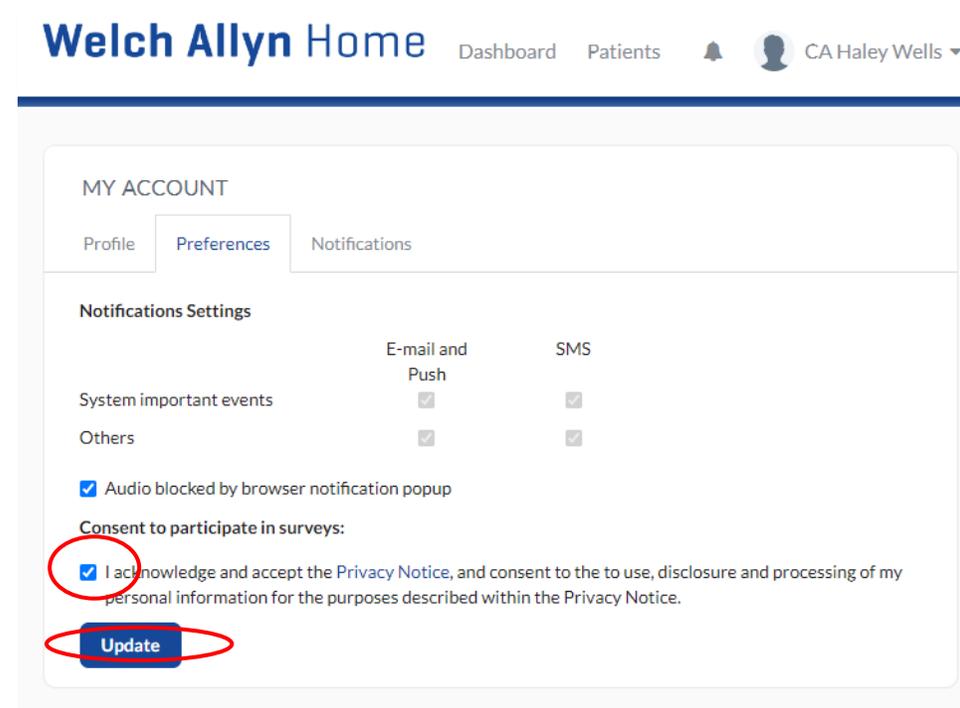


Click name on the right side of the menu bar.

Click **My Account**.



Click **Edit**



Under Consent to participate in surveys, click on the checkbox to uncheck and revoke your consent to participate in the surveys.

Accessing the Admin Panel

Clinic Admins can view both the Provider and Admin views. To access the Admin Panel, the Clinic Admin would have to change views.

Note:

- To go back to the Provider view, click **Provider Dashboard** under the name on the right side of the menu bar
- A shortcut to switch to the Provider view is to click the Welch Allyn Home logo on the upper left side of the menu bar
- The last view (whether Provider Dashboard or Admin Panel) will be the same view when logged back in.

The screenshot displays the Welch Allyn Home dashboard. At the top, there is a navigation bar with the Welch Allyn Home logo, 'Dashboard', and 'Patients' tabs. On the right side of the navigation bar, the user's name 'Haley Wells' is displayed with a dropdown arrow. A dropdown menu is open, showing options: 'My Account', 'Admin Panel' (highlighted with a red circle), 'Invite Patient', 'Privacy Notice', 'Terms of Use', 'About us', 'Help', and 'Log Out'. Below the navigation bar, the main content area is titled 'PATIENTS' and contains four risk assessment charts: 'Patients By Blood Pressure Risk', 'Patients By Weight Risk', 'Patients By Blood Oxygen Risk', and 'Patients By Heart Rate Risk'. Each chart shows a donut chart with 'High Risk' at 0% and '0 patients' below it. The charts are currently in a greyed-out state. At the bottom, there are two more chart titles: 'Patients By Temperature Risk' and 'Patients By Respiratory Rate Risk'.

Click name on the right side of the menu bar.

Click **Admin Panel**.

Reviewing and Updating Clinic Information

1 - Click name on the right side of the menu bar. Click **Admin Panel**.

2 – Click Clinic from the Admin menu bar

3 – Edit the information to be updated

4 – Click **Update**

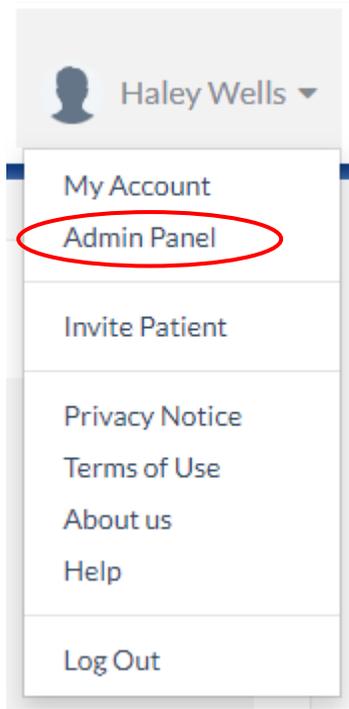
The screenshot shows the Welch Allyn Home Admin Panel. At the top, the navigation bar includes 'Welch Allyn Home', 'Dashboard', 'Clinic', 'Rooms', 'Users', 'Report', and 'Audit logs'. The 'Clinic' link is circled in red and labeled with a '2'. On the right, a user profile for 'Haley Wells' is shown with a dropdown menu containing 'My Account', 'Admin Panel', 'Invite Patient', 'Privacy Notice', 'Terms of Use', 'About us', 'Help', and 'Log Out'. The 'Admin Panel' option is circled in red and labeled with a '1'. Below the navigation bar, the 'CLINIC DETAILS' form is displayed. It has two tabs: 'Clinic' and 'Health Settings'. The 'Clinic' tab is selected and circled in red, labeled with a '3'. The form fields include: 'Clinic Name*' (text input with 'Heartwell Clinic'), 'Master Language (optional)' (text input with 'Please select a language option'), 'Address 1 (optional)' and 'Address 2 (optional)' (text inputs), 'City (optional)', 'State (optional)' (dropdown menu), 'Zip Code (optional)' (text input), and 'Country (optional)' (dropdown menu with 'United States'). At the bottom right of the form, there is a blue 'Update' button circled in red and labeled with a '4'.

Setting Clinic-wide Patient Risk Ranges

Both Clinic Admin and System Admin can manage Clinic-wide risk range settings.

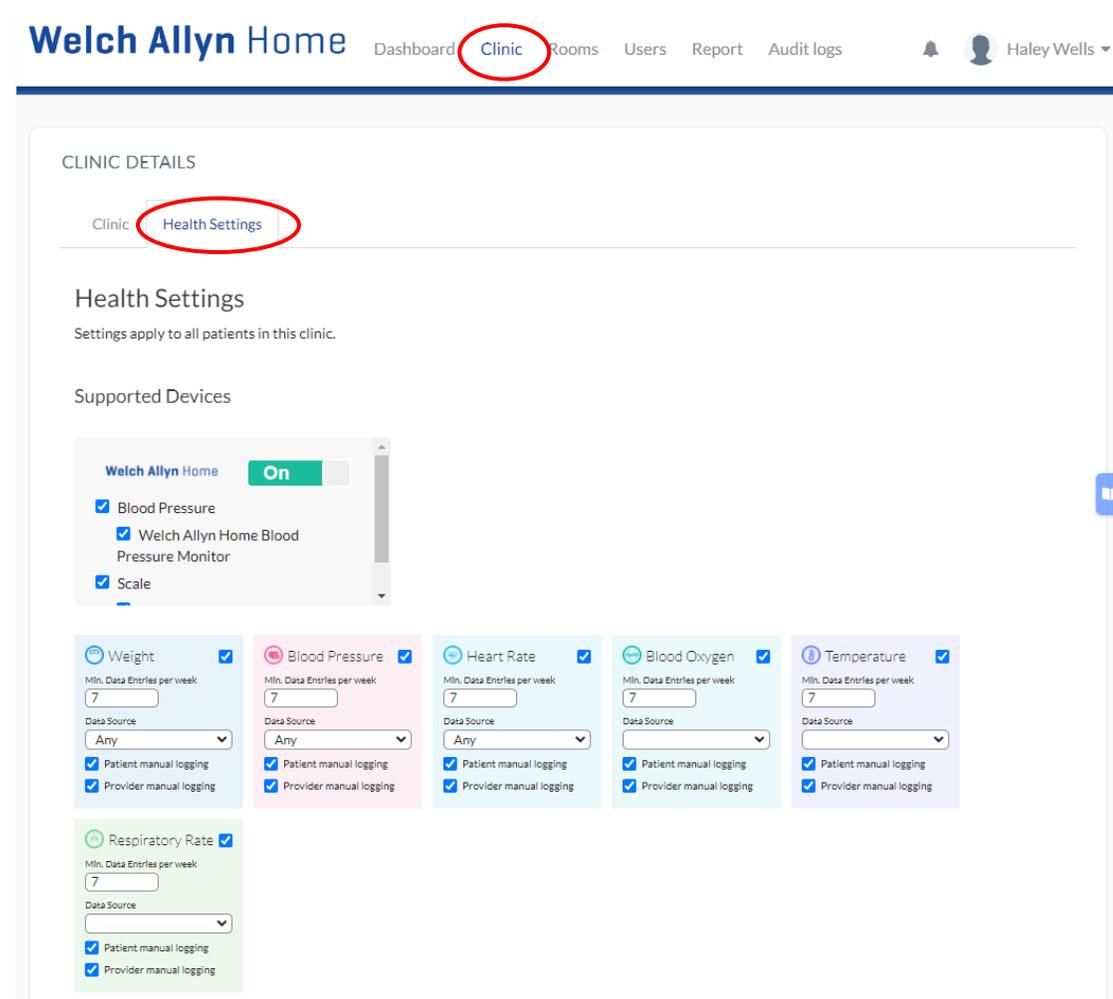
Risk range settings visualization will reflect on the health dashboard measurement chart and table of the Clinician/Provider, and the Patient's day view of the health dashboard in the Patient Portal.

Note: Changes made on an individual patient's risk range settings override the clinic-wide settings.



Click name on the right side of the menu bar.

Click **Admin Panel**.



Click **Clinic** from the menu bar

Click **Health Settings** under Clinic Details

Setting Clinic-wide Patient Risk Ranges – cont'd

Under Risk Range Settings, adjust the sliders to determine the range for risk readings.

NOTE Normal range shows as green, Medium risk alert shows as orange, High Risk alert shows as red.

Clicking Reset all to default will not override individual patient risk range settings set by the Clinician/Provider

Click **Edit**

Risk Range Settings
Flag patients in your health dashboard when custom risk ranges are reached. Reset to clinic defaults settings anytime.

Risk color guide

- Normal Range
These are the target values
- Medium Risk Alert
Patient's health is at risk
- High Risk Alert
Patient needs emergency care
- Achievement
Patient exceeded target values

[RESET ALL TO DEFAULT](#)

Parameter	Unit	0	60	11	143	206	500
Weight	lbs	0	60	11	143	206	500
Heart Rate	bpm	0	55	70	95	120	200
Blood Oxygen	%	0	90	9	100		
Temperature	°F	94	96	97	99	100	105
Respiratory Rate	bpm	0	6	12	20	24	80
Blood Pressure	mmHg	0	40	90	120	140	300
Diastolic		0	30	60	80	90	200

[Update](#)

Creating Users

Role	Patient Health Data	Admin Panel
Clinic Administrator	Switch to Provider Dashboard	<ul style="list-style-type: none"> • All admin functionalities – can make changes to the clinical portal with wide-range impact • Recommended for managing the clinic and room controls
System Administrator	Provider, SA - Switch to Provider Dashboard	<ul style="list-style-type: none"> • To handle routine technical portal administration duties • Role responsible for the technical portal administration duties, such as registering the practice, adding new users, and establishing practice settings.
Clinician	✓	<ul style="list-style-type: none"> • Users tab only – to perform administrative actions for patients • Role responsible for patient care and following patient progress.
Provider	✓	✗

Creating Users – cont'd

<i>Functions</i>	<i>Clinic administrator</i>	<i>System administrator</i>	<i>Clinician</i>	<i>Provider</i>
<i>Clinic actions</i>				
Edit clinic	X	X		
View clinic details	X	X		
<i>Room actions</i>				
Create room	X			
Edit and view room details	X	X		
Delete room	X			
Clone room	X			
Search for room	X	X		
<i>Actions on System Administrators</i>				
Create system admin user	X	X		
Edit system admin user	X	X		
Delete system admin user	X	X		
Set password for system admin user	X	X		
Manage role of system admin user	X	X		

Creating Users – cont'd

<i>Functions</i>	<i>Clinic administrator</i>	<i>System administrator</i>	<i>Clinician</i>	<i>Provider</i>
<i>Actions on Clinicians and Providers</i>				
Create clinician or provider	X	X		
Edit clinician or provider	X	X		
Delete clinician or provider	X	X		
Set password for clinician or provider	X	X		
Search for clinician or provider	X	X		
Manage role of clinician or provider	X	X		
View list of clinicians or providers	X	X		
<i>Actions on Patients</i>				
Create patient	X	X	X	
Invite patient			X	X
Edit patient	X	X	X	X
Delete patient	X	X	X	
Suspend/confirm patient	X	X	X	
Set patient password	X	X	X	
Search for patient	X	X	X	X
View list of patients	X	X	X	X
View patient details	X	X	X	X
Upload documents			X	X

Creating Users – cont'd

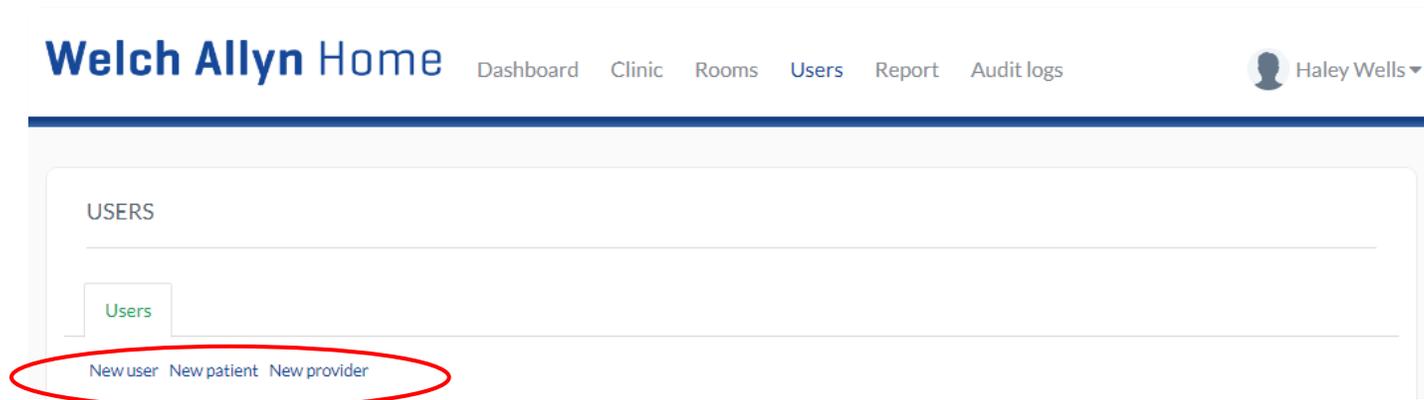
<i>Functions</i>	<i>Clinic administrator</i>	<i>System administrator</i>	<i>Clinician</i>	<i>Provider</i>
<i>Actions on health data</i>			X	X
Manually enter health data			X	X
Edit and delete health data that was added manually			X	X
Manage clinic risk range settings	X	X		
Manage provider risk range settings			X	X
Manage custom patient specific risk range settings			X	X
Manage provider risk range notification settings			X	X
Enable/disable health tile	X	X		
View Health dashboard			X	X
Export health data			X	X
Export time log			X	X
Unsubscribe patient			X	X
Run health analytics/ practice report	X	X		
View Audit logs	X	X		
Export Audit logs	X	X		

Creating Users – cont'd

New User – to create System users only (System Admin/ Clinic Admin); System users do not have access to Patient health data

New Patient – to create a Patient account

New Provider – to create a Clinician or Provider account.



Creating Users – System Users

Both system users – System Admin and Clinic Admin have the Admin Panel view by default, and do not have access to the Provider Dashboard.

The only difference of the CA from the SA is that the CA has the ability to:

- Create room
- Delete room
- Clone room

A

The Administrator would have to access the Admin Panel by clicking the name on the right side of the menu bar, and clicking **Admin Panel**

Welch Allyn Home Dashboard Clinic Rooms **Users** Report Audit logs Haley Wells

USERS

Users

New user New patient New provider

ID Full Name Email All status All users

Select User Role Select a clinic Select a room Search Export

<input type="checkbox"/>	Last login	User	Room	Action
<input type="checkbox"/>	2024-05-16 06:54:14 Sign up: 2024-05-10 10:44:12 Status: Active	Haley Wells ID: 20006640669 User name: chi+wah+heartwell@vseelab.com Email: chi+wah+heartwell@vseelab.com VSee ID: chi+wah+heartwell@vseelab.com Type: Provider (CA, provider)	Heartwell Clinic Code: Blajw Link/u/clinic	Edit Delete Set password User Role

Showing 1 to 1 of 1 1 25 / page

Click Users from the Menu tab

Click **New User**

Creating Users – System Users (cont'd)

Welch Allyn Home Dashboard Clinic Rooms Users Report Audit logs CA Haley Wells

Users » Add user

ADD USER

First Name *

Last Name *

Email *

Phone:

Save

Enter the new user information in the fields provided: First Name, Last Name, and Email Address

Click **Save**

Welch Allyn Home Dashboard Clinic Rooms Users Report Audit logs CA Haley Wells

USERS

Users

New user New patient New provider

ID Full Name Email All status All users

Select User Role Select a clinic Select a room **Search** **Export**

<input type="checkbox"/>	Last login	User	Room	Action
<input type="checkbox"/>	2024-05-16 06:54:14 Sign up: 2024-05-10 10:44:12 Status: Active	CA Haley Wells ID: 20006640669 User name: chi+wah+heartwell@vseelab.com Email: chi+wah+heartwell@vseelab.com VSee ID: chi+wah+heartwell@vseelab.com Type: Provider (CA, provider)	Heartwell Clinic Code: 8lajw Link/u/clinic	Edit Delete Set password User Role
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 09:51:38 Status: Active	SA Sally Smith ID: 20006839885 User name: chi+heartwell+sa@vseelab.com Email: chi+heartwell+sa@vseelab.com VSee ID: chi+heartwell+sa@vseelab.com Type: Common admin	(no rooms assigned)	Edit Delete Set password User Role

Showing 1 to 2 of 2 **1** 25 / page

A message appears to let you know the add of the new user was successful and then returns you to the overall list of users.

Find the new user in the list and click **User Role** in the Action column.

Creating Users – System Users (cont'd)

USER ROLE ✕

Full Name: SA Sally Smith Email: chi+heartwell+sa@vseelab.com

Select User Role

Clinic Admin
Recommended for managing the clinic and room controls.

Clinician
Role responsible for patient care and following patient progress.

System Admin
Role responsible for the technical portal administration duties, such as registering the practice, adding new users, and establishing practice settings.

Cancel Save Changes

User	Room	Action
ADMIN Haley Wells ID: 20006640669 User name: chi+wah+heartwell@vseelab.com Email:chi+wah+heartwell@vseelab.com VSee ID: chi+wah+heartwell@vseelab.com Type: Provider (CA, provider)	Heartwell Clinic Code: 8lajw Link/u/clinic	Edit Delete Set password User Role
CA Cathy Adams ID: 20006892358 User name: chi+heartwell+ca@vseelab.com Email:chi+heartwell+ca@vseelab.com VSee ID: chi+heartwell+ca@vseelab.com Type: Common admin (CA)	(no rooms assigned)	Edit Delete Set password User Role
SA Sally Smith ID: 20006839885 User name: chi+heartwell+sa@vseelab.com Email:chi+heartwell+sa@vseelab.com VSee ID: chi+heartwell+sa@vseelab.com Type: Common admin (system_admin_wah)	(no rooms assigned)	Edit Delete Set password User Role

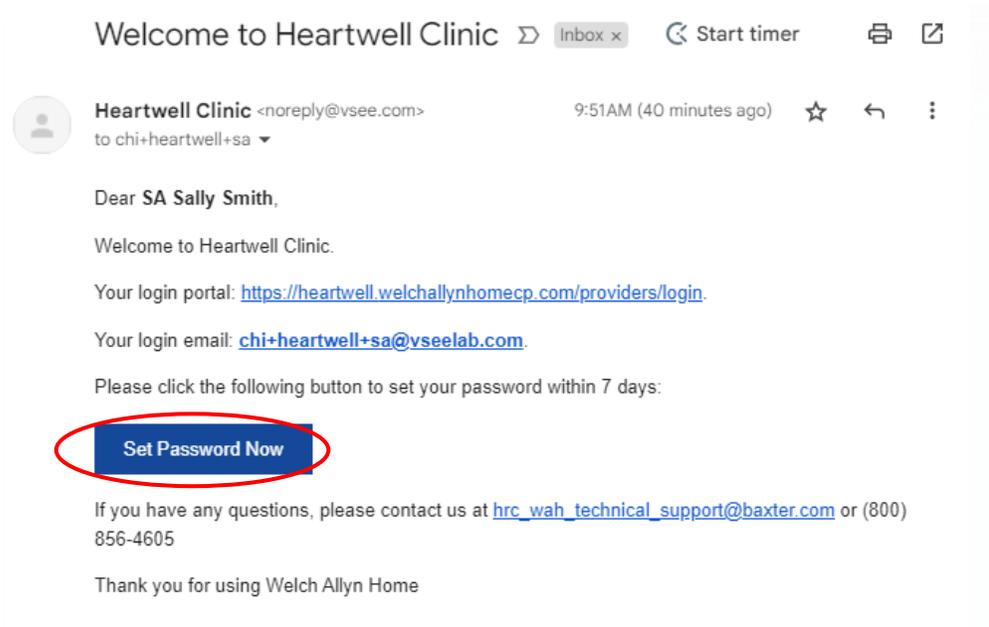
In the resulting USER ROLE popup, check the box next to the desired role and click on **Save Changes**.

A message appears to let you know the user was updated.

System User types would be under Common Admin (no Provider Dashboard view). In closed caption, it will show whether the user is a Clinic Admin (CA) or System Admin (SA)

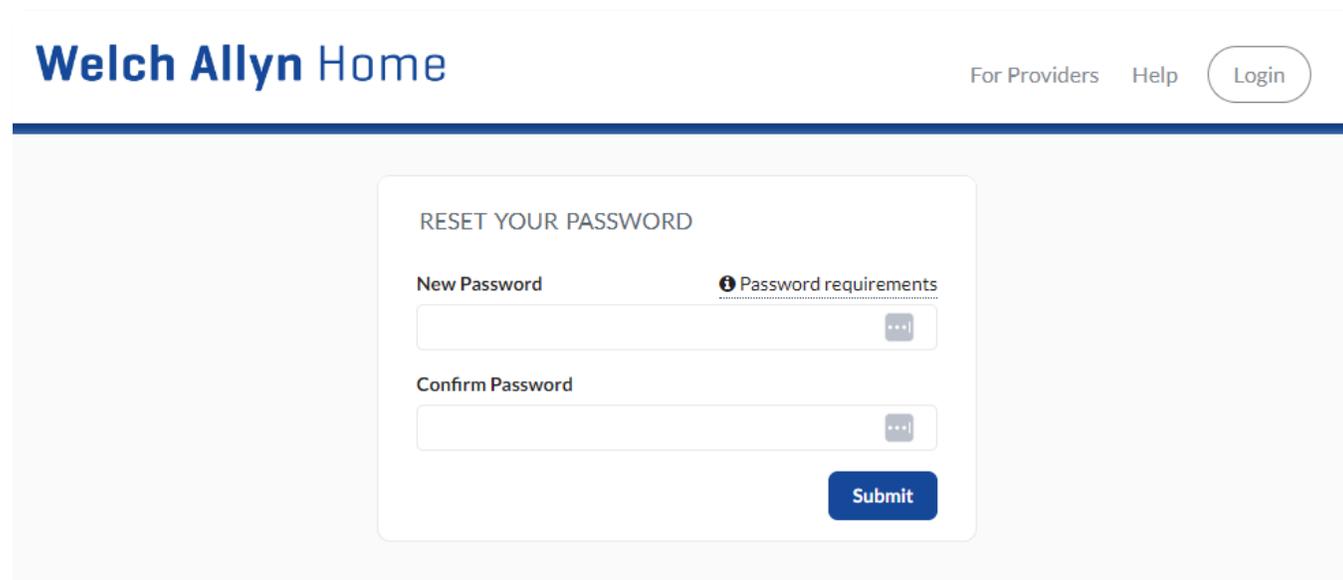
Creating Users – System Users (cont'd)

New System Users have 7 days to set their password. The link to set the password will no longer be valid upon expiration.



Check for the Welcome email.

Click **Set Password Now**



Enter the new password and retype to confirm the password

Click Submit

Creating Users – System Users (cont'd)

As Admin, System Users and the Administrator can set the user password as an alternative option.

User	Room	Action
ADMIN Haley Wells ID: 20006640669 User name: chi+wah+heartwell@vseelab.com Email:chi+wah+heartwell@vseelab.com VSee ID: chi+wah+heartwell@vseelab.com Type: Provider (CA, provider)	Heartwell Clinic Code: Blajw Link/u/clinic	Edit Delete Set password User Role
CA Cathy Adams ID: 20006892358 User name: chi+heartwell+ca@vseelab.com Email:chi+heartwell+ca@vseelab.com VSee ID: chi+heartwell+ca@vseelab.com Type: Common admin (CA)	(no rooms assigned)	Edit Delete Set password User Role
SA Sally Smith ID: 20006839885 User name: chi+heartwell+sa@vseelab.com Email:chi+heartwell+sa@vseelab.com VSee ID: chi+heartwell+sa@vseelab.com Type: Common admin (system_admin_wah)	(no rooms assigned)	Edit Delete Set password User Role

Click **Set Password**

Enter a temporary password in the New password field, check the box next to Show password (so you can visually confirm and note what the password is), and click **Update Password**.

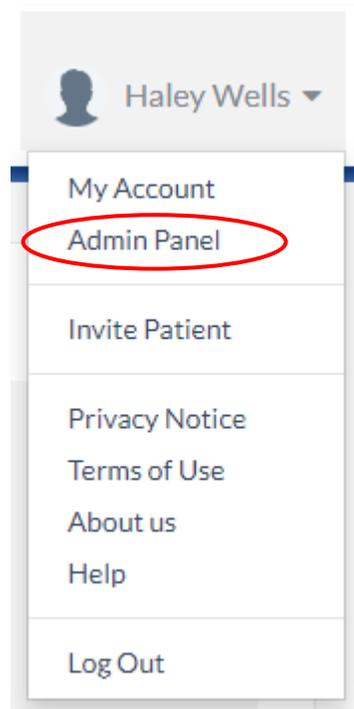
Instruct the user to check their email and log in to the clinical portal using the temporary password created for them. They can edit their user information as needed after logging in.

Creating Users – Patients

Ideally, the Patients would be the ones to create/sign up for an account on their own through the Welch Allyn Home app. However, Admins and Clinicians can help in creating a Patient account.

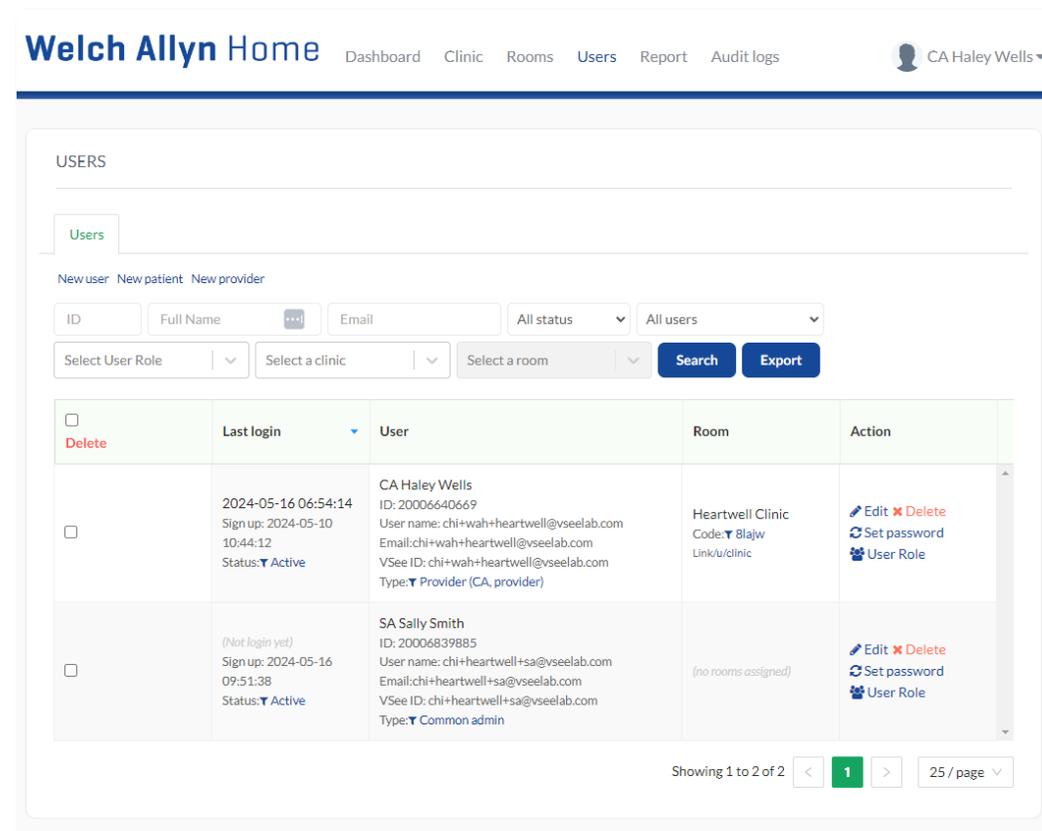
Patients would be able to access their health records through the Welch Allyn Home app and the Patient Portal.

Existing Patients from the old app need not be created manually as they will be migrated to the new Welch Allyn Home Clinic.



Click name on the right side of the menu bar.

Click **Admin Panel**.



On the menu bar, click **Users > New patient**.

Creating Users – Patients (cont'd)

Welch Allyn Home Dashboard Clinic Rooms Users Report Audit logs CA Haley Wells

Success! The patient's account created.

PATIENT DETAIL: CRIS GREEN

Profile Rooms Management Other

User Type (optional)
Patient

Username *
chi+heartwell+patient3@vseelab.com

First Name *
Cris

Last Name *
Green

Email *
chi+heartwell+patient3@vseelab.com

MRN (optional)

Gender (optional)

Date of Birth (optional)
Month Day Year

Address (optional)

City (optional)

State (optional)

Zip (optional)

Country (optional)
United States

Phone (optional)

Primary Care Physician Name (optional)

Primary Care Physician Phone (optional)

Timezone (optional)
(UTC-07:00) Pacific Time (US & Canada)

Cancel Save

Complete the Clinic, Rooms, Username (use their Email address), First Name, Last Name, Email, and any other optional information.

Then click on **Create**.

A message saying that the patient's account was created appears with the PATIENT DETAIL screen.

Enter any other optional information and click on **Save**.

Welch Allyn Home Dashboard Clinic Rooms Users Report Audit logs CA Haley Wells

USERS

Users

New user New patient New provider

ID Full Name Email All status All users

Select User Role Select a clinic Select a room Search Export

Delete	Last login	User	Room	Action
<input type="checkbox"/>	2024-05-16 12:52:10 Sign up: 2024-05-10 10:44:12 Status: Active	CA Haley Wells ID: 20006640669 User name: chi+wah+heartwell@vseelab.com Email: chi+wah+heartwell@vseelab.com VSee ID: chi+wah+heartwell@vseelab.com Type: Provider (CA, provider)	Heartwell Clinic Code: Blajw Link/u/clinic	Edit Delete Set password User Role
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 09:51:38 Status: Active	SA Sally Smith ID: 20006839885 User name: chi+heartwell+sa@vseelab.com Email: chi+heartwell+sa@vseelab.com VSee ID: chi+heartwell+sa@vseelab.com Type: Common admin (system_admin_wah)	(no rooms assigned)	Edit Delete Set password User Role
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 11:13:07 Status: Active	Michelle Parker ID: 20006844929 User name: chi.achacoso+heartwell+patient@gmail.com Email: chi.achacoso+heartwell+patient@gmail.com VSee ID: cmo+user20006844929 Type: Patient	Heartwell Clinic Code: Blajw Link/u/clinic	Edit Delete Set password
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 11:37:03 Status: Active	Adam Barney ID: 20006845866 User name: chi+heartwell+patient2@vseelab.com Email: chi+heartwell+patient2@vseelab.com VSee ID: cmo+user20006845866 Type: Patient	Heartwell Clinic Code: Blajw Link/u/clinic	Edit Delete Set password
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 12:53:32 Status: Active	Cris Green ID: 20006849353 User name: chi+heartwell+patient3@vseelab.com Email: chi+heartwell+patient3@vseelab.com VSee ID: cmo+user20006849353 Type: Patient	Heartwell Clinic Code: Blajw Link/u/clinic	Edit Delete Set password

Showing 1 to 5 of 5 1 25 / page

The information is saved and the overall list of users displays.

Find the new user in the list and click **Set password** in the Action column.



Creating Users – Patients (cont'd)

Enter a temporary password in the New password field,

Check the box next to Show password (so you can visually confirm and note what the password is)

Click **Update Password**.

A success message appears. Click **Cancel** to go back to the list of users

Share the new patient user information and temporary password with the clinician/ provider who will invite the new patient to join.

ID	Full Name	Email	All status	All users	Select User Role
<input type="checkbox"/>	Last login	User			
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 11:37:03 Status: Active	Adam Barney ID: 20006845866 User name: chi+heartwell+patient2@vseelab.com Email: chi+heartwell+patient2@vseelab.com VSee ID: cmo+user20006845866 Type: Patient		Heartwell Clinic Code: 81ajw Link/u/clinic	Edit Delete Set password

The user type will show as "Patient" in the list of users table

Creating Users – Patients (cont'd)

The Administrator, system users, and clinician can also push the reset password email to a patient.

The screenshot shows the 'USERS' management page. At the top, there are filters for ID, Full Name, Email, All status, All users, and Select User Role. Below these are buttons for 'Search' and 'Export'. A table lists users with columns for 'Delete', 'Last login', 'User', 'Room', and 'Action'. The 'Action' column for Adam Barney has an 'Edit' button circled in red.

<input type="checkbox"/>	Last login	User	Room	Action
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 11:37:03 Status: Active	Adam Barney ID: 20006845866 User name: chi+heartwell+patient2@vseelab.com Email: chi+heartwell+patient2@vseelab.com VSee ID: cmo+user20006845866 Type: Patient	Heartwell Clinic Code: Blajw Link/u/clinic	<input type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/> Set password

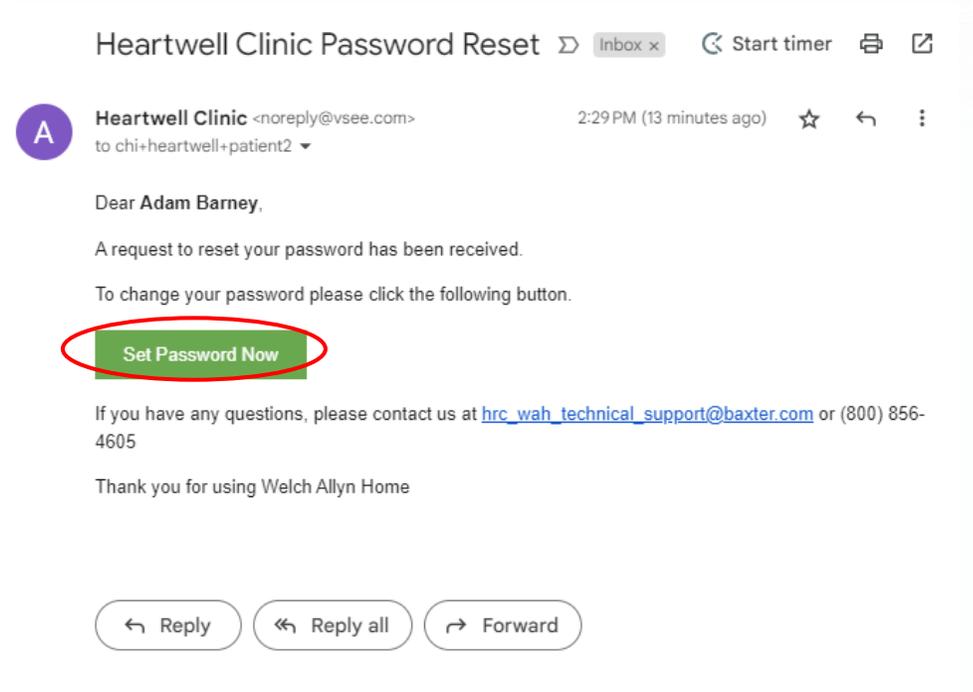
Click **Edit** on the Action column of the Patient to whom the reset password email will be sent

The screenshot shows the 'Welch Allyn Home' interface. The top navigation bar includes 'Dashboard', 'Clinic', 'Rooms', 'Users', 'Report', and 'Audit logs'. The main content area is titled 'PATIENT DETAIL: ADAM BARNEY' and has tabs for 'Profile', 'Rooms Management', and 'Other'. The 'Other' tab is circled in red. Below the tabs is a 'Login detail' section with fields for Username, Password, Email, Status, and User type. A 'Send Reset Password Email' button is circled in red.

Under Patient Detail, click the **Other** tab

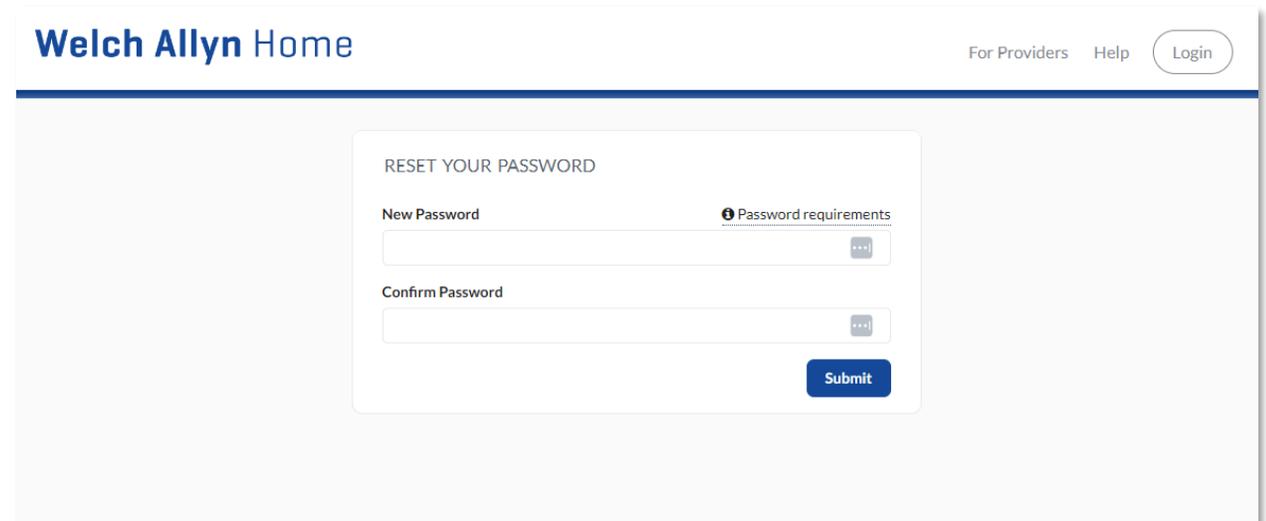
Click **Send Reset Password Email**

Creating Users – Patients (cont'd)



Open the Password Reset email. Check Spam if the email is not seen in the Inbox

Click Set **Password Now**



Enter the new password and re-enter the password to confirm

Click **Submit**

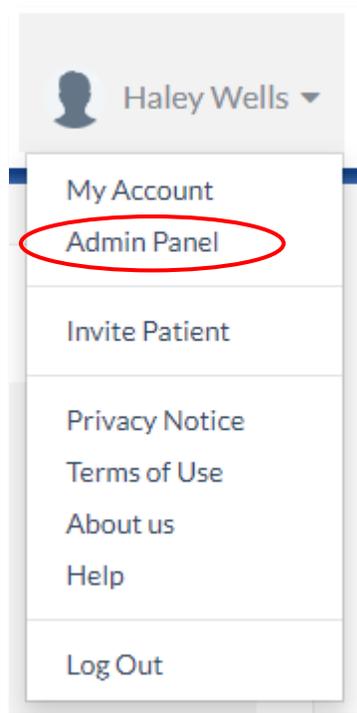
Creating Users – Clinician/ Providers

The Administrator and System Users can create Clinician and Provider accounts.

Unlike the Clinician, Providers do not have access to the Admin Panel, therefore cannot do the following:

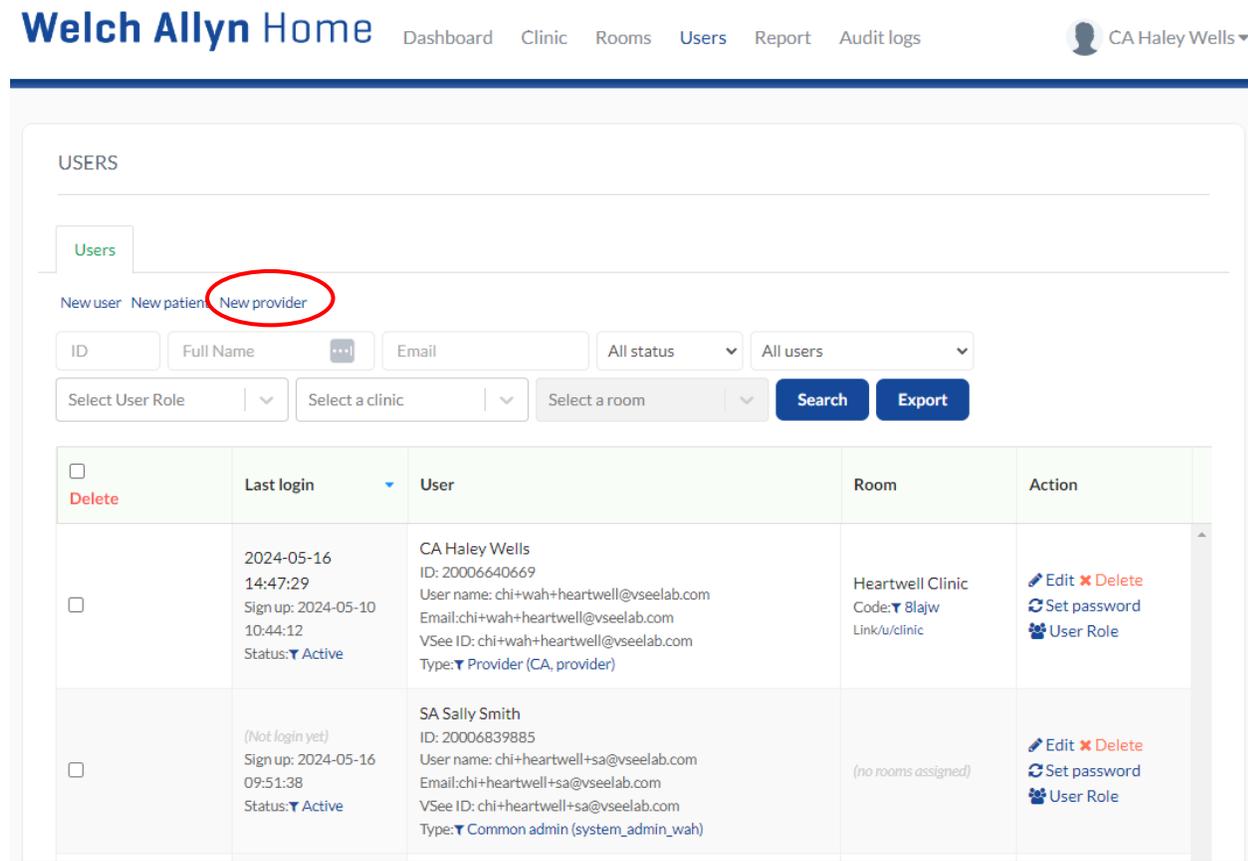
- Create patient
- Delete patient
- Suspend/ Confirm patient
- Set Patient password

The Clinician will be able to switch to the Admin Panel but would only have access to the Users tab of the menu bar



Click name on the right side of the menu bar.

Click **Admin Panel**.



On the menu bar, click **Users**

Click **New provider**.

The NEW PROVIDER screen appears.

Creating Users – Clinician/ Providers – cont'd

The screenshot shows the 'NEW PROVIDER' form in the 'Subtype' step. A progress bar at the top indicates the current step is 'Subtype', followed by 'Demographics', 'Profile', 'Assignment', and 'License'. The 'Subtype' dropdown menu is highlighted with a red circle and contains the option 'Licensed Service Provider'. Below the dropdown are 'Cancel' and 'Next' buttons.

Select the clinician's provider type from the Subtype dropdown and click **Next**.

The screenshot shows the 'NEW PROVIDER' form in the 'Demographics' step. The progress bar at the top shows 'Demographics' as the current step. The form contains several input fields: 'First Name', 'Last Name', 'Email', 'Gender (optional)', 'Title (optional)', 'Suffix (optional)', 'Phone (optional)', 'Street Addr (optional)', 'City (optional)', 'State (optional)', 'Zip (optional)', 'Country (optional)', 'Sales Rep Name (optional)', and 'Sales Rep Phone Number (optional)'. 'Cancel' and 'Next' buttons are at the bottom.

Complete the First Name, Last Name, Email, and any other optional demographic information.

Click **Next**.



Creating Users – Clinician/ Providers (cont'd)

The screenshot shows the 'NEW PROVIDER' form with a progress bar at the top. The progress bar has five steps: Subtype, Demographics, Profile, Assignment, and License. The 'Profile' step is currently active, indicated by a blue circle. Below the progress bar, the form contains several optional fields: 'Medical School', 'Internship', 'Residency', 'Language' (a dropdown menu), 'Short Bio' (with a placeholder 'e.g Family Therapist...'), and 'Bio' (a rich text editor with a toolbar). At the bottom, there is a 'Picture' field with a dashed border and the text 'Drag and Drop files here Or Click Here to browse files'. 'Cancel' and 'Next' buttons are located at the bottom of the form.

Enter profile information (optional) and then select **Next**.

The screenshot shows the 'NEW PROVIDER' form with the progress bar. The 'Assignment' step is active, indicated by a blue circle. The form includes an 'Assignments (optional)' section with a radio button selected for 'By rooms'. Below this is a dropdown menu labeled 'Add room(s)'. 'Cancel' and 'Next' buttons are at the bottom.

Enter the room assignment (optional) and then select **Next**.
Note: Only users added to a room would show in the Clinic Report

The screenshot shows the 'NEW PROVIDER' form with the progress bar. The 'License' step is active, indicated by a blue circle. The form includes fields for 'NPI (optional)', 'Specialties (optional)' (a dropdown menu), and 'States Licensed (optional)' (a dropdown menu). Below these is a note: 'Specialties dataset is populated from assigned rooms.' At the bottom, there is a 'States Serviced' field with a dropdown menu showing 'All locations'. 'Cancel' and 'Save' buttons are at the bottom.

Enter license information (optional) and then select **Next**.
The overall list of users displays.

Creating Users – Clinician/ Providers (cont'd)

USERS

Users

New user New patient New provider

ID Full Name Email All status All users

Select User Role Select a clinic Select a room Search Export

<input type="checkbox"/>	Last login	User	Room	Action
<input type="checkbox"/>	2024-05-16 14:47:29 Sign up: 2024-05-10 10:44:12 Status: Active	CA Haley Wells ID: 20006640669 User name: chi+wah+heartwell@vseelab.com Email: chi+wah+heartwell@vseelab.com VSee ID: chi+wah+heartwell@vseelab.com Type: Provider (CA, provider)	Heartwell Clinic Code: 8 lajw Link/u/clinic	Edit Delete Set password User Role
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 09:51:38 Status: Active	SA Sally Smith ID: 20006839885 User name: chi+heartwell+sa@vseelab.com Email: chi+heartwell+sa@vseelab.com VSee ID: chi+heartwell+sa@vseelab.com Type: Common admin (system_admin_wah)	(no rooms assigned)	Edit Delete Set password User Role
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 12:53:32 Status: Active	Cris Green ID: 20006849353 User name: chi+heartwell+patient.3@vseelab.com Email: chi+heartwell+patient.3@vseelab.com VSee ID: cmo+user20006849353 Type: Patient	Heartwell Clinic Code: 8 lajw Link/u/clinic	Edit Delete Set password
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 16:15:30 Status: Active	CL Clark Robinson ID: 20006857736 User name: chi+heartwell+clinician@vseelab.com Email: chi+heartwell+clinician@vseelab.com VSee ID: chi+heartwell+clinician@vseelab.com Type: Provider (provider)	(no rooms assigned)	Edit Delete Set password User Role

Showing 1 to 6 of 6 < **1** > 25 / page v

The Provider has been created. To add the extra accesses and create a Clinician, find the new user in the list and click **User Role** in the Action column.

USER ROLE

Full Name: CL Clark Robinson Email: chi+heartwell+clinician@vseelab.com

Select User Role

Clinic Admin
Recommended for managing the clinic and room controls.

Clinician
Role responsible for patient care and following patient progress.

System Admin
Role responsible for the technical portal administration duties, such as registering the practice, adding new users, and establishing practice settings.

Cancel Save Changes

In the resulting USER ROLE popup, check the box next to Clinician and click on **Save Changes**. A message appears to let you know the user was updated.

Creating Users – Clinician/ Providers (cont'd)

Clinician and Provider types would be tagged as "Provider". In closed caption, it will show whether the user is a Provider, or Clinician.

Instruct the user to check their email for instructions to login and set their password. They can edit their user information as needed after logging in.

USERS

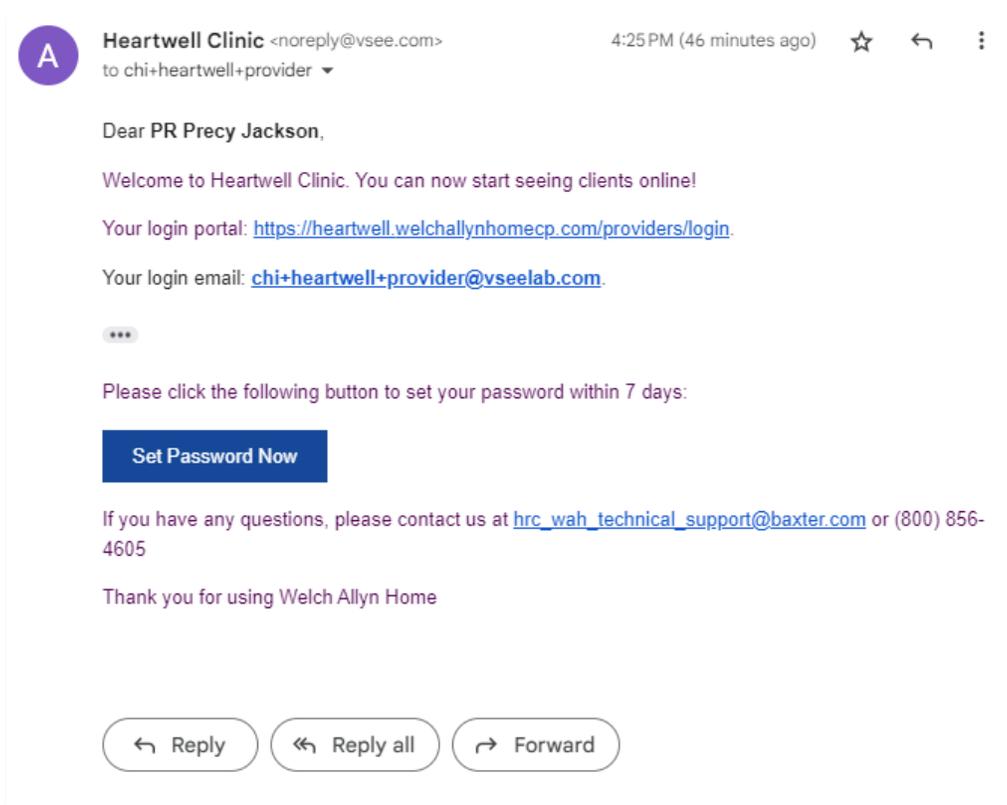
[Users](#)

[New user](#) [New patient](#) [New provider](#)

<input type="checkbox"/>	Last login	User	Room	Action
<input type="checkbox"/>	2024-05-16 14:47:29 Sign up: 2024-05-10 10:44:12 Status: Active	CA Haley Wells ID: 20006640669 User name: chi+wah+heartwell@vseelab.com Email: chi+wah+heartwell@vseelab.com VSee ID: chi+wah+heartwell@vseelab.com Type: Provider (CA, provider)	Heartwell Clinic Code: 8lajw Link/u/clinic	Edit Delete Set password User Role
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 09:51:38 Status: Active	SA Sally Smith ID: 20006839885 User name: chi+heartwell+sa@vseelab.com Email: chi+heartwell+sa@vseelab.com VSee ID: chi+heartwell+sa@vseelab.com Type: Common admin (system_admin_wah)	(no rooms assigned)	Edit Delete Set password User Role
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 12:53:32 Status: Active	Cris Green ID: 20006849353 User name: chi+heartwell+patient3@vseelab.com Email: chi+heartwell+patient3@vseelab.com VSee ID: cmo+user20006849353 Type: Patient	Heartwell Clinic Code: 8lajw Link/u/clinic	Edit Delete Set password
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 16:15:30 Status: Active	CL Clark Robinson ID: 20006857736 User name: chi+heartwell+clinician@vseelab.com Email: chi+heartwell+clinician@vseelab.com VSee ID: chi+heartwell+clinician@vseelab.com Type: Provider (provider, clinician_wah)	(no rooms assigned)	Edit Delete Set password User Role
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 16:25:22 Status: Active	PR Precy Jackson ID: 20006857860 User name: chi+heartwell+provider@vseelab.com Email: chi+heartwell+provider@vseelab.com VSee ID: chi+heartwell+provider@vseelab.com Type: Provider (provider)	Heartwell Clinic Code: 8lajw Link/u/clinic	Edit Delete Set password User Role

Showing 1 to 7 of 7 1 25 / page

Creating Users – Clinician/ Providers (cont'd)



Open the Welcome email. Check Spam if the email is not seen in the Inbox

Click Set **Password Now**

A screenshot of the Welch Allyn Home password reset page. The page title is 'Welch Allyn Home' and it includes links for 'For Providers', 'Help', and 'Login'. The main content is a 'RESET YOUR PASSWORD' form with two password input fields: 'New Password' and 'Confirm Password'. Below the fields are three checkboxes for terms and conditions: 'I acknowledge and accept the Terms of Use', 'I acknowledge and accept the Privacy Notice, and consent to the use, disclosure and processing of my personal information for the purposes described within the Privacy Notice.', and 'I would like to participate in surveys that may be periodically distributed by Welch Allyn to collect information relevant to my user experience of the Portal. I consent to Welch Allyn using and retaining my information to distribute such user experience surveys to me.' A 'Submit' button is at the bottom right of the form, and a 'Privacy Notice' link is at the bottom center.

Set a password that meets the requirements and re-enter the password to confirm

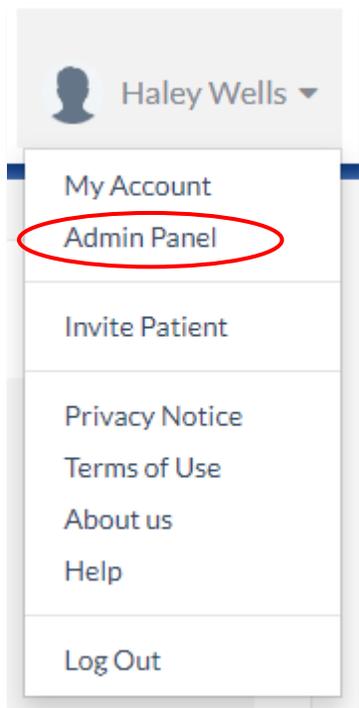
Review the Terms and Conditions and click the boxes to agree with the Terms of Services and Survey Participation

Click **Submit**

Editing Users - Information

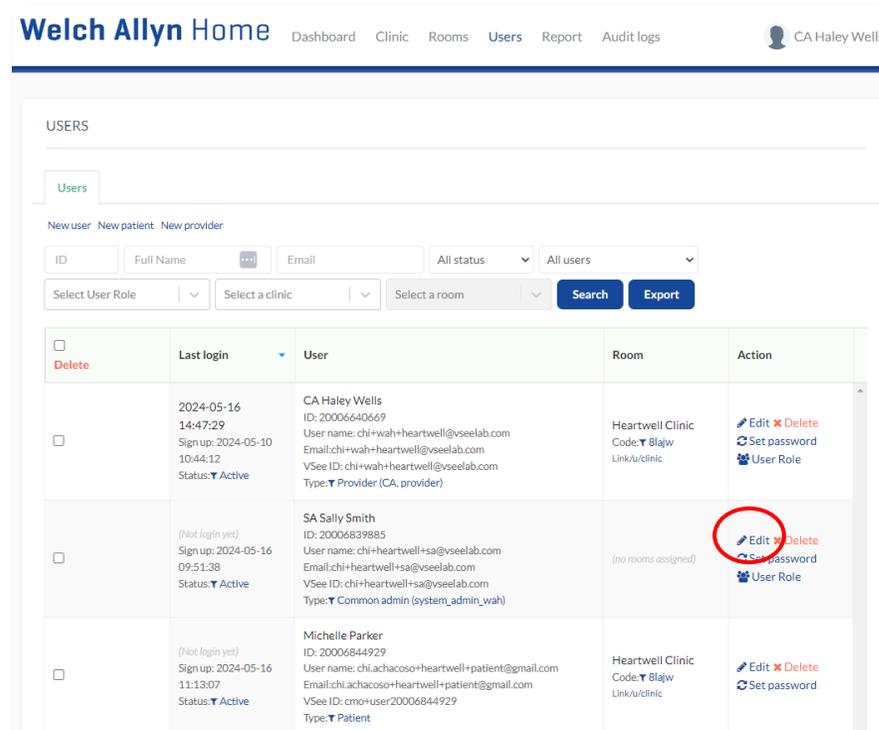
An administrator, System user and Clinician can edit user accounts when needed.

Examples of common changes are setting new passwords or updating email address information.



Click name on the right side of the menu bar.

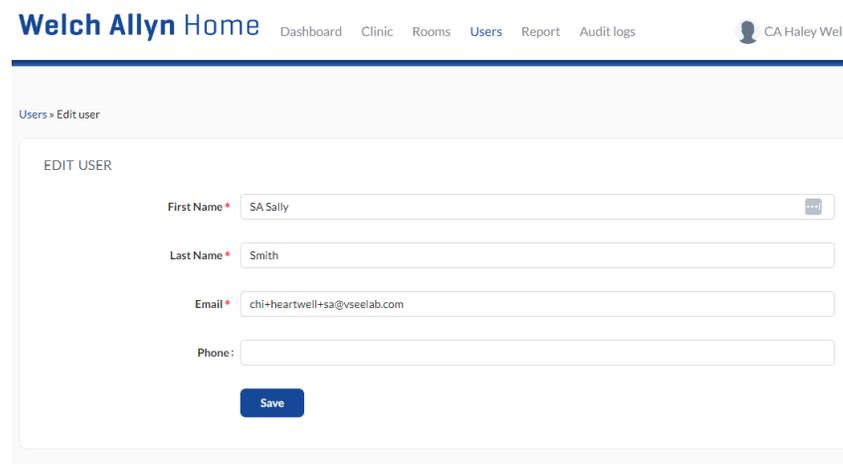
Click **Admin Panel**.



On the menu bar, click **Users**.

You can scroll through the list or search using the Full name or Email address to locate the user to update.

Click **Edit** in the Action column.



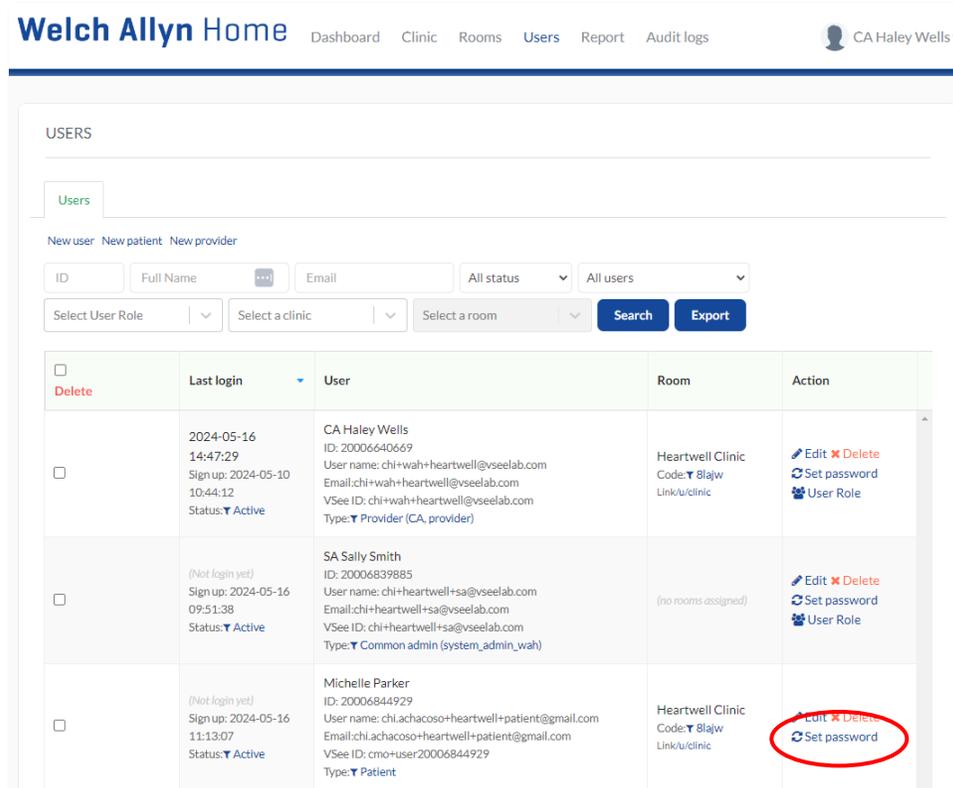
Update the user's information

Click on **Save** when done.

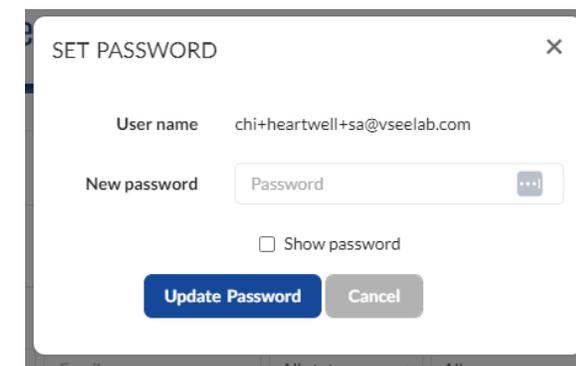
Editing Users - Setting a Password

A password may be set for users. This is especially helpful for Patients who have no access to their emails anymore. They would be able to log in and change their password without the need to access their email.

Note: Password on the Portal will be the same on the Welch Allyn Home app (for Patients)



Click **Set password**

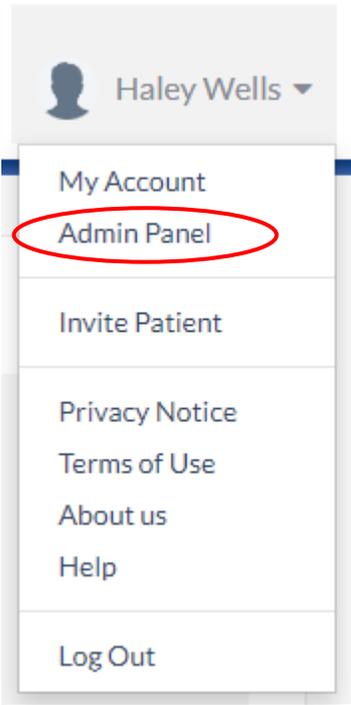


Set a password that meets the requirements

Click **Update Password**

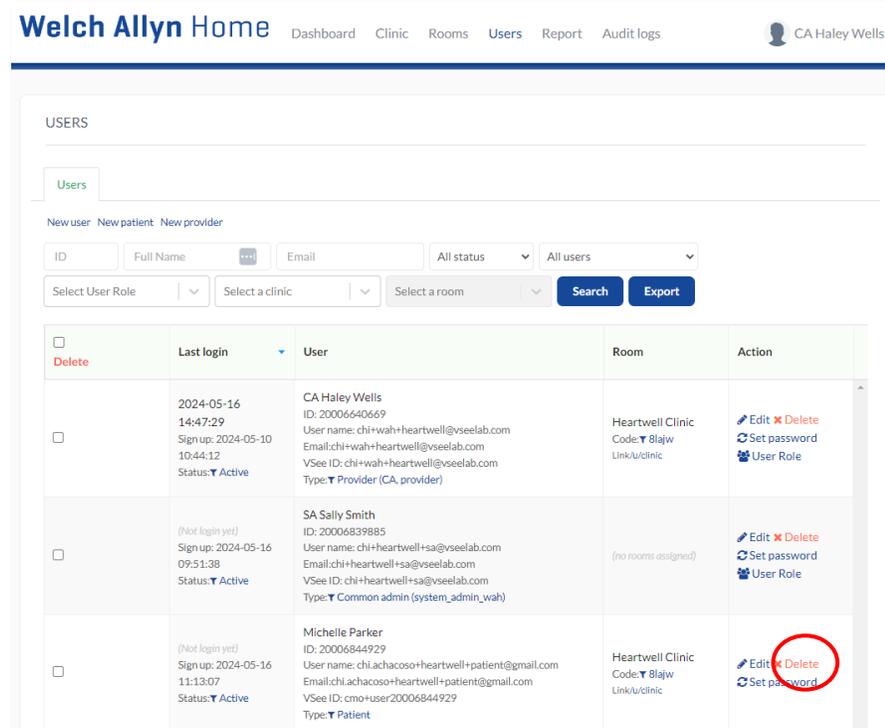
Share the log in information to the user.

Deleting Users



Click name on the right side of the menu bar.

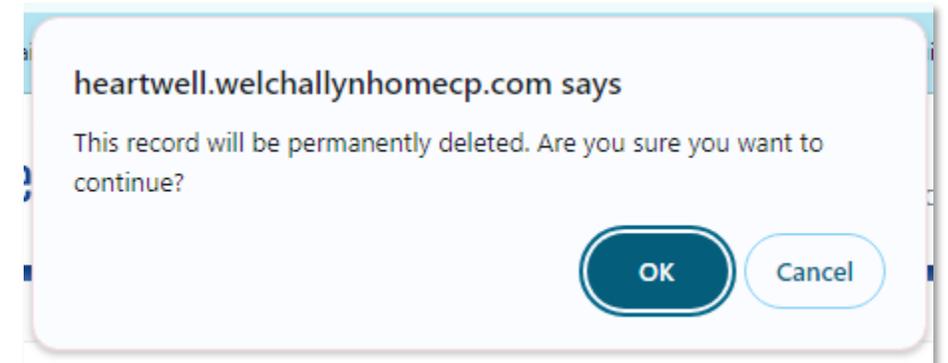
Click **Admin Panel**.



On the menu bar, click **Users**.

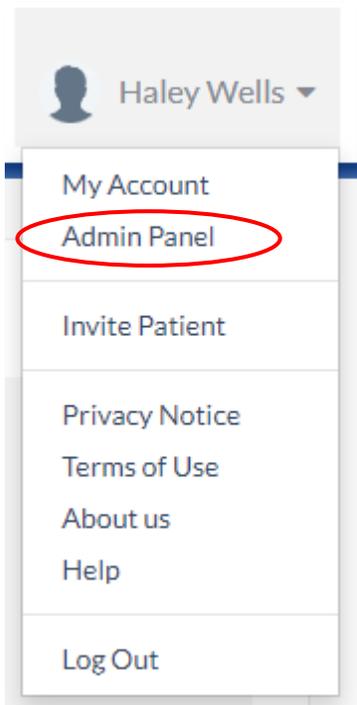
You can scroll through the list or search using the Full name or Email address to locate the user to update.

Click **Delete** in the Action column



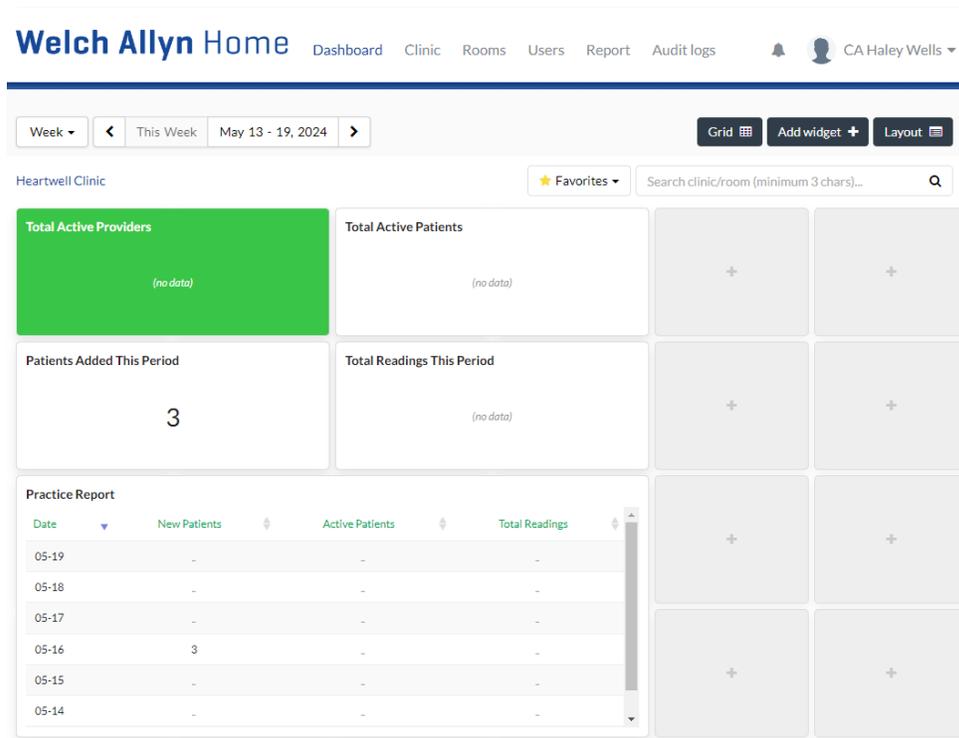
Click on **OK** to confirm deletion of the account..

Clinic Report



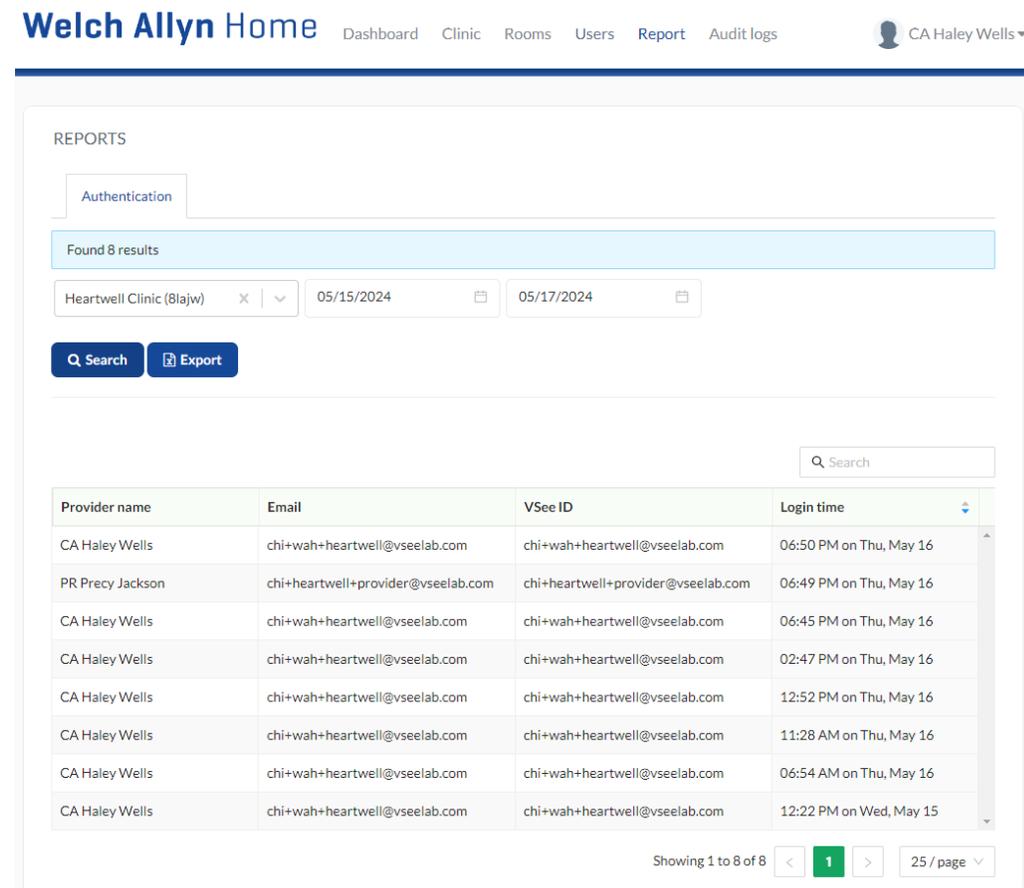
Click name on the right side of the menu bar.

Click **Admin Panel**.



On the menu bar, click **Report**.

The REPORTS screen appears.



Select rooms from the dropdown, set the date range desired and click **Search**. A list of users who logged in for the selected room and date range displays in column format.

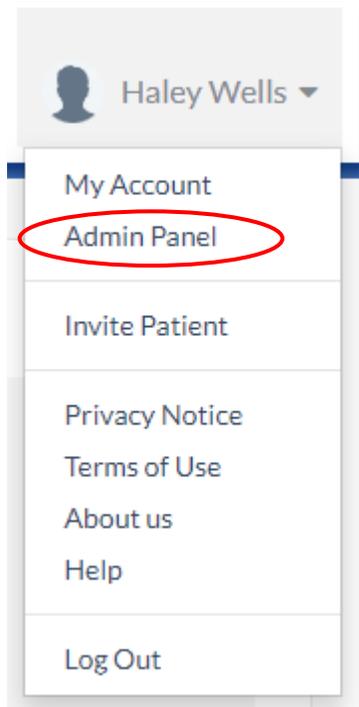
To save the information displayed, click **Export**. A spreadsheet containing the information is downloaded onto the computer.

Admin Panel Dashboard

The Admin Panel Dashboard is a visual presentation of different Clinic data such as:

- Total Active Providers, Patients
- Patients added to a selected period
- Practice Report: New Patients, Active Patients and Total Readings

Note: Changes made on the dashboard would not affect the view of other users



Click name on the right side of the menu bar.

Click **Admin Panel**.

Welch Allyn Home

[Dashboard](#) [Clinic](#) [Rooms](#) [Users](#) [Report](#) [Audit logs](#)

CA Liberty Matt...

The dashboard screenshot shows a navigation bar with a date selector (Week, This Week, Apr 15 - 21, 2024) and layout controls (Grid, Add widget, Layout) circled in red. The main content area is for 'Cardio Care Clinic' and includes a 'Practice Report' table.

Date	New Patients	Active Patients	Total Readings
04-21	-	1	22
04-20	-	1	-
04-19	-	1	-
04-18	-	1	-
04-17	-	1	-
04-16	-	-	-

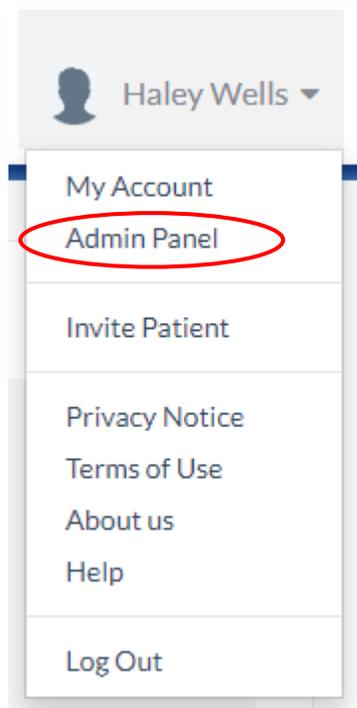
Select the **week / period**

Additional customizations on layout can be seen on the right side of the screen (below the user's name)

Audit Logs

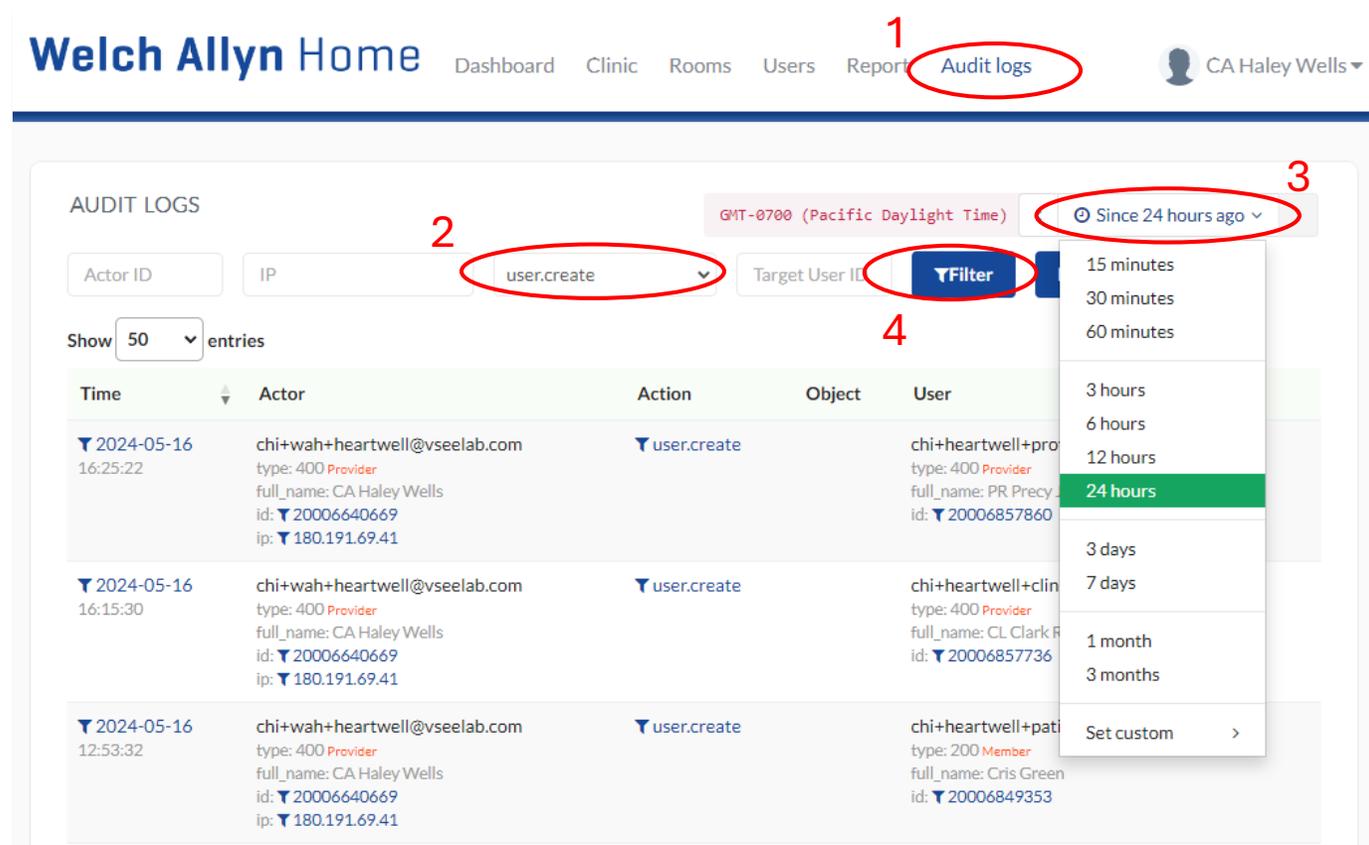
The audit log allows the Administrator and System Users to view a list of audit log entries.

By default, the log is a reverse-chronological listing of the most recent 200 (maximum) recorded actions in the portal. Filters can be applied to refine the list, and export the list from the portal.



Click name on the right side of the menu bar.

Click **Admin Panel**.



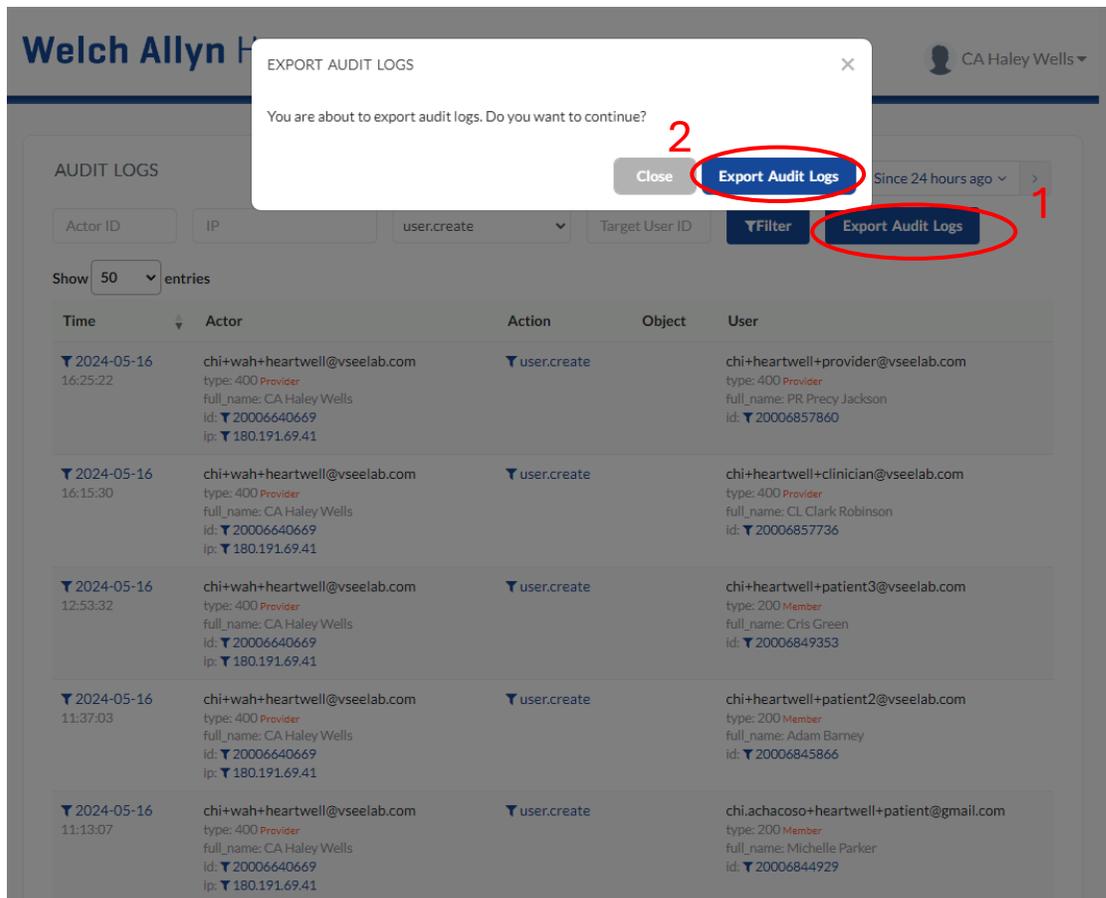
1 – On the menu bar, click **Audit Logs**.

2 – Set search parameters on the left side of the screen

3 – Set the timeframe on the rights side of the screen

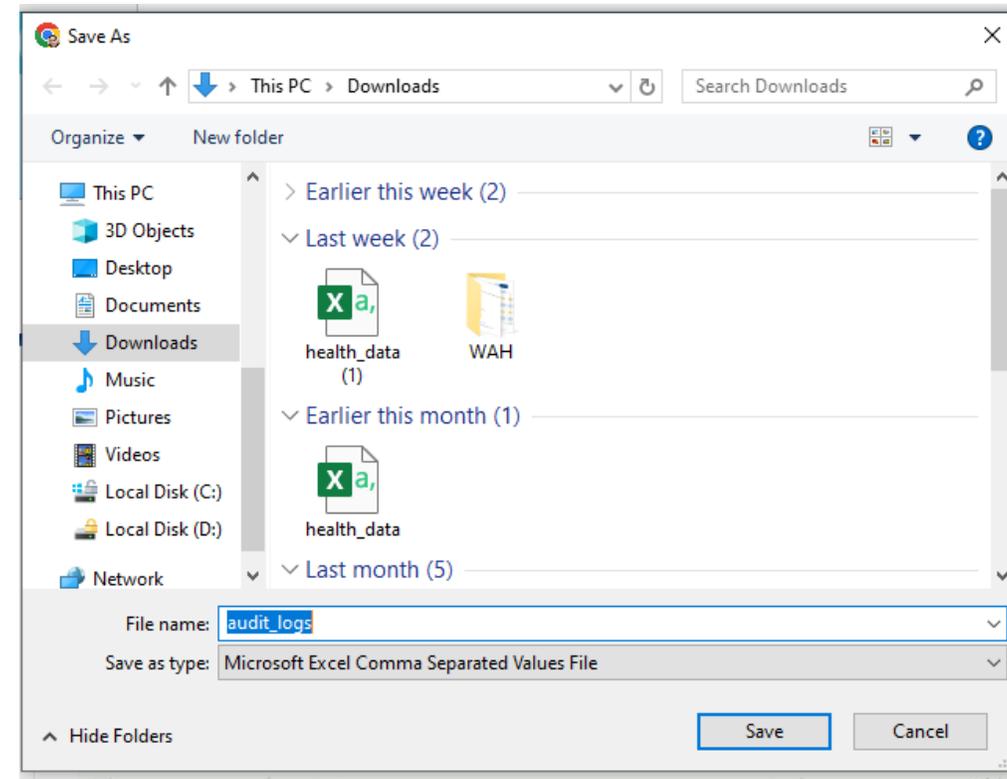
4 – Click **Filter**

Audit Logs – cont'd



To save the information displayed, click **Export Audit Logs** next to the Filter button

Click **Export Audit Logs** when the pop-up screen appears.



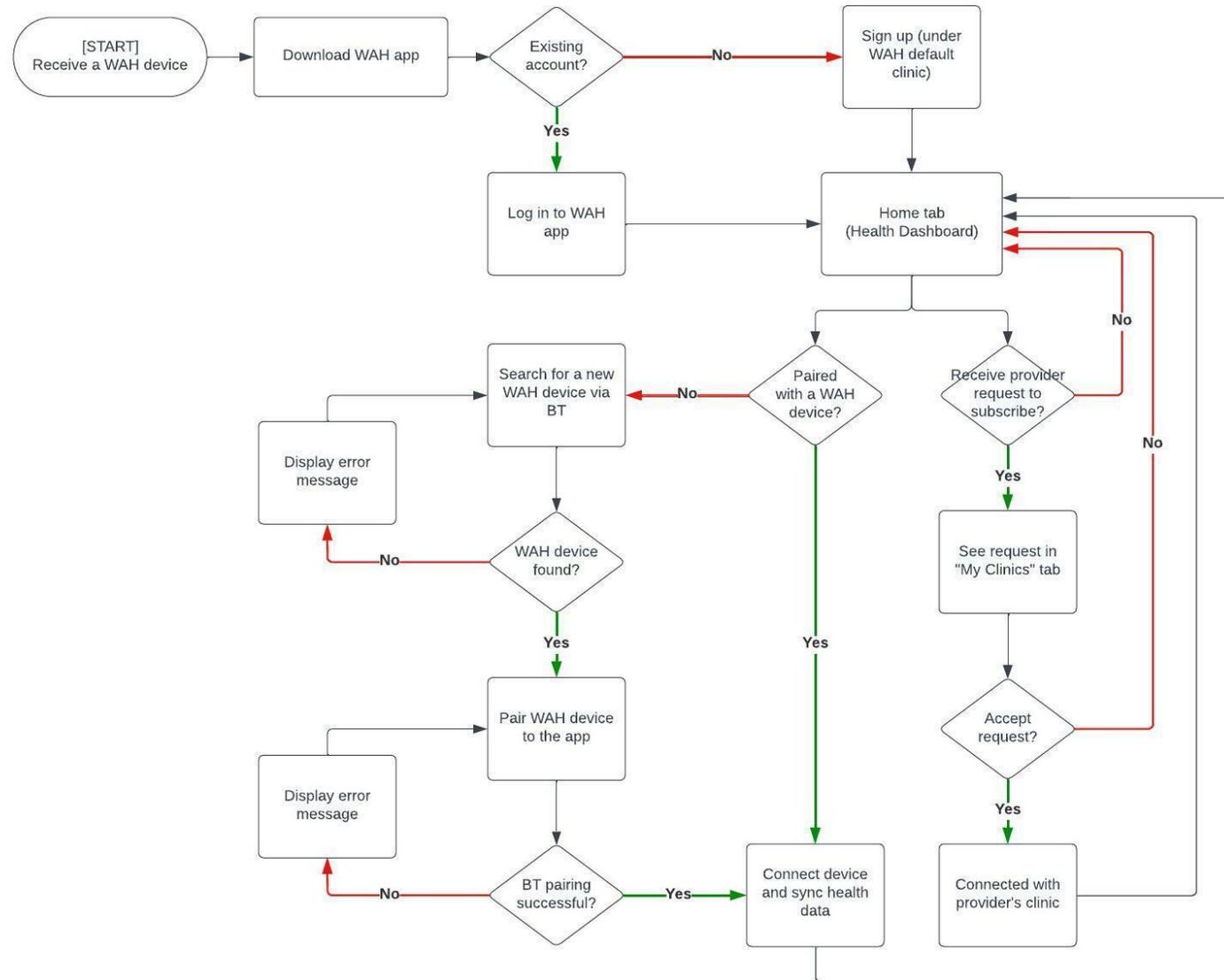
Click **Save**

A spreadsheet (.csv) containing the information is downloaded onto the computer.



Patient

Patient Journey



Patient Device Requirements

Mobile	Desktop/laptop
 Android	Android OS version 11.0 or later Bluetooth 4.0 or later Internet connection (4G, 10Mbps, or greater speed) Email account
 iOS	iOS version 14.0 or later Bluetooth 4.0 or later Internet connection (4G, 10Mbps, or greater speed) Email account

3 Ways How a Patient Account is Created

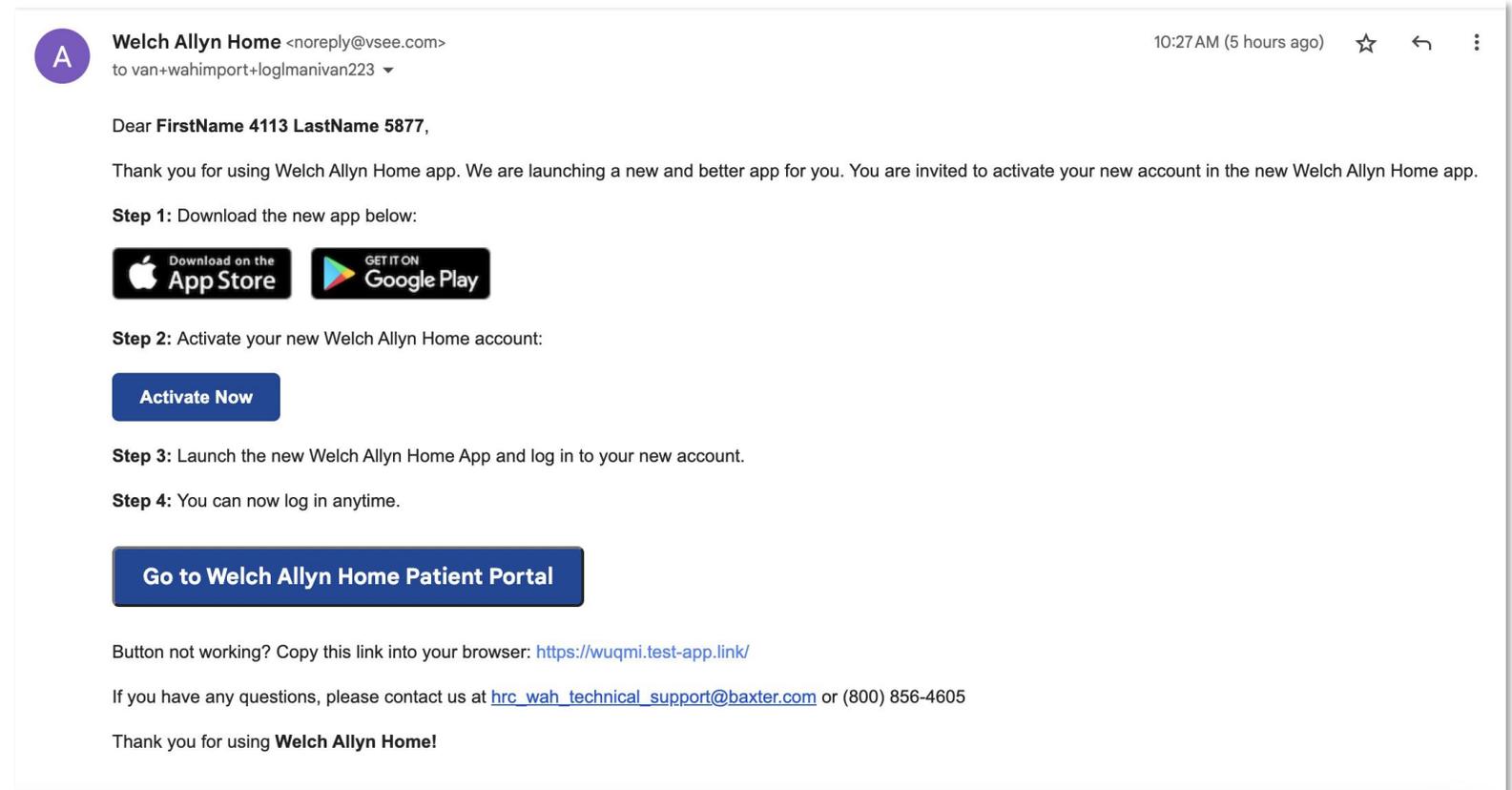
Type of Patient	Created by:	Action to be taken
Existing Patient	Migrated data	<ol style="list-style-type: none"> 1. Check email 2. Download the new Welch Allyn Home App 3. Activate the new Welch Allyn Home account and set the Password 4. Sign in the Welch Allyn Home App or Welch Allyn Home Web Portal
New Patient	Patient Sign-up (app)	<ol style="list-style-type: none"> 1. Patient downloads the Welch Allyn Home App 2. Patient will set up their account through the Welch Allyn Home app on their mobile device 3. Patient will verify their account, set up their password, and complete the creation of their account 4. Sign in the Welch Allyn Home App or Welch Allyn Home Web Portal
New Patient	Created by Admin (clinic portal)	<ol style="list-style-type: none"> 1. An <u>Admin</u> will create a new patient account and set a password for the Patient. Admin shares the password to the Provider/Clinician 2. <u>Provider/Clinician</u> shares the password to the Patient 3. Patient downloads the Welch Allyn Home App 4. Patient logs in the Welch Allyn Home App using the email and temporary password 5. Patient is recommended to change their password 6. Patient is recommended to enter their profile information

*Admin: Clinical Admin and System Admin privileges

Existing Patient

1. Check email
2. Download the new Welch Allyn Home App
 - It is recommended to use only one device per account
3. Activate the new WAH account
 - Reset Password
4. Sign in on the WAH App

Note: The Patient can also sign in to their Welch Allyn Home Web Portal account using the same credentials



*Sample email that will be received by Patients that were migrated from the old Welch Allyn Home app

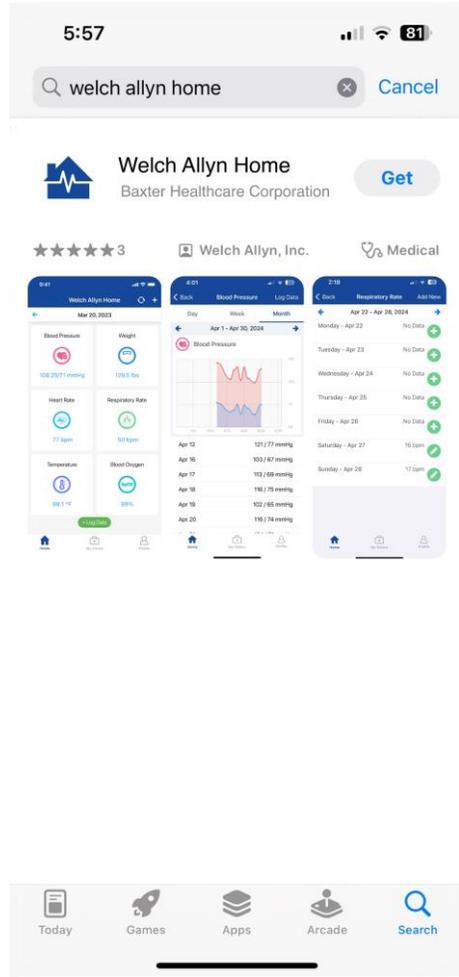
The tutorial video showed an older version of this email. We have added the Go to Welch Allyn Home Patient Portal button on the update.

Existing Patient – cont'd

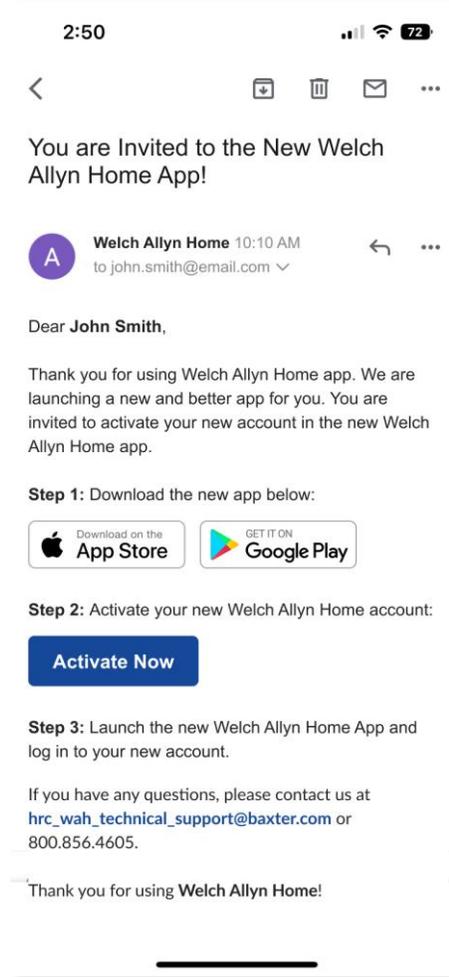
To download the App:

A – Open the email on the mobile device to be used for syncing readings and tap the App Store or Google play button

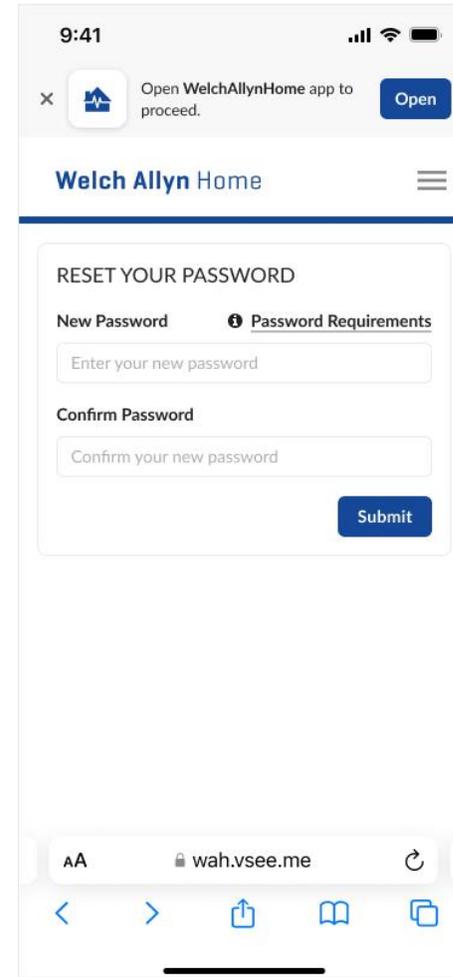
B – Search for Welch Allyn Home from the App Store or Play Store



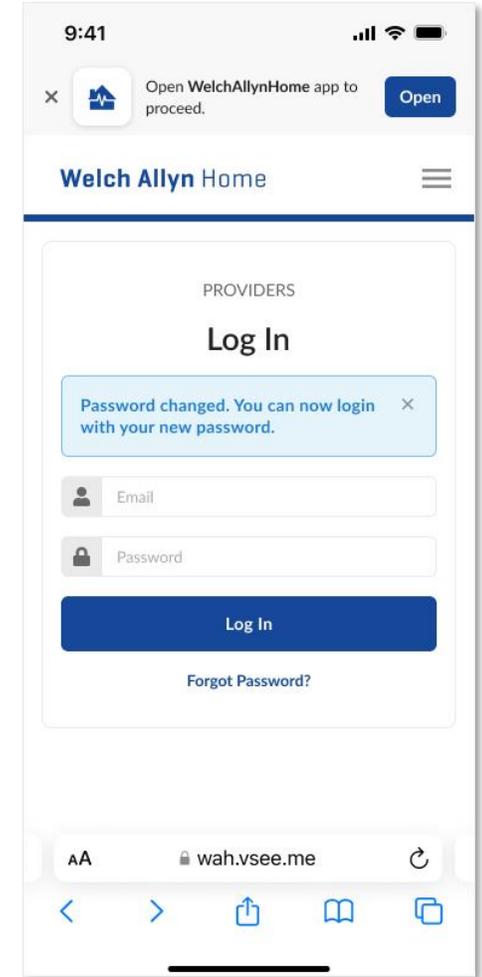
Tap **Get/ Install > Download**



Go back to the email and tap **Activate Now**



Enter a password that meets the requirements and reenter to confirm



Enter the email and password

Tap **Log In**

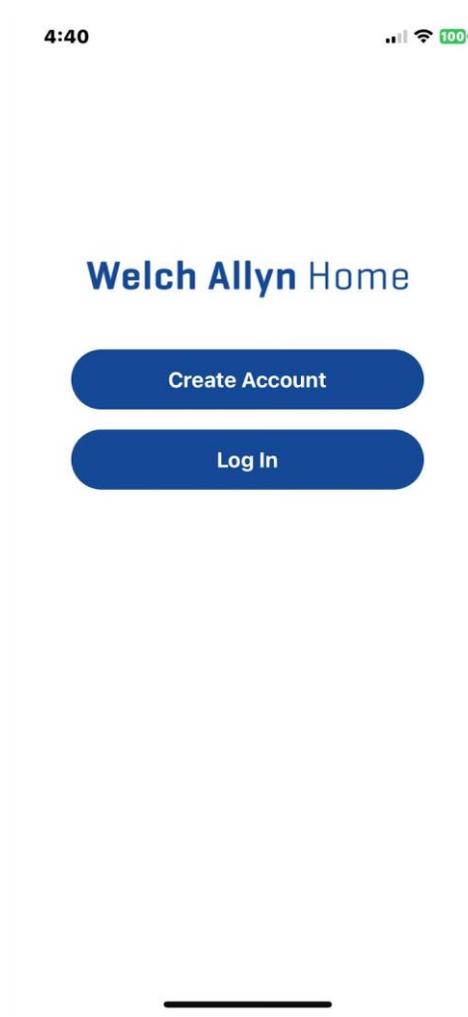
Open the **Welch Allyn Home App**

New Patient – Patient Sign-up

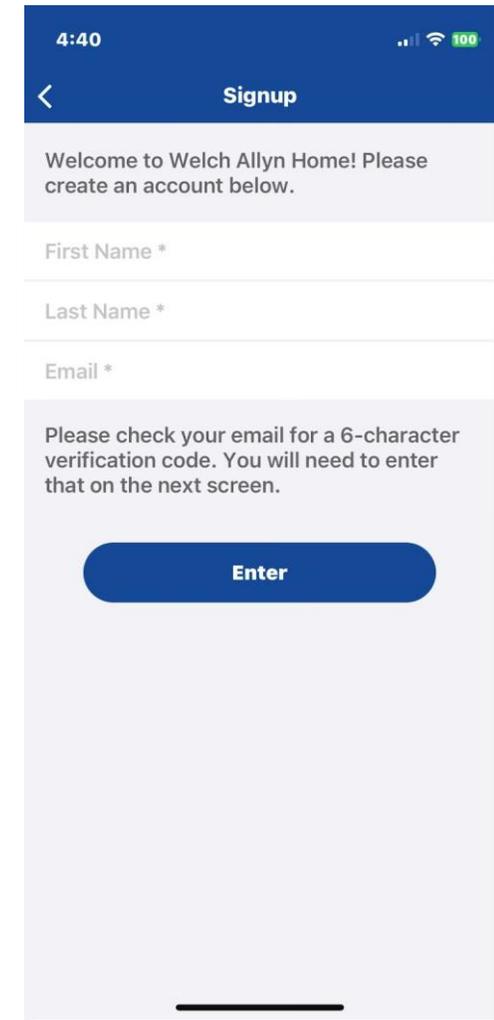
1. The patient downloads the Welch Allyn Home app.

- If the phone hardware is not compatible, the App cannot be downloaded from the Store.
- Enough storage space on the phone is needed.

2. Patient will set up their account through the Welch Allyn Home app on their mobile device



The patient selects **Create Account**.



The patient inputs their **First Name, Last Name, Email** and hits **Enter**.

New Patient – Patient Sign-up – cont'd

3. Patient will verify their account, set up their password, and complete the creation of their account

4. Sign in the Welch Allyn Home App or Welch Allyn Home Web Portal

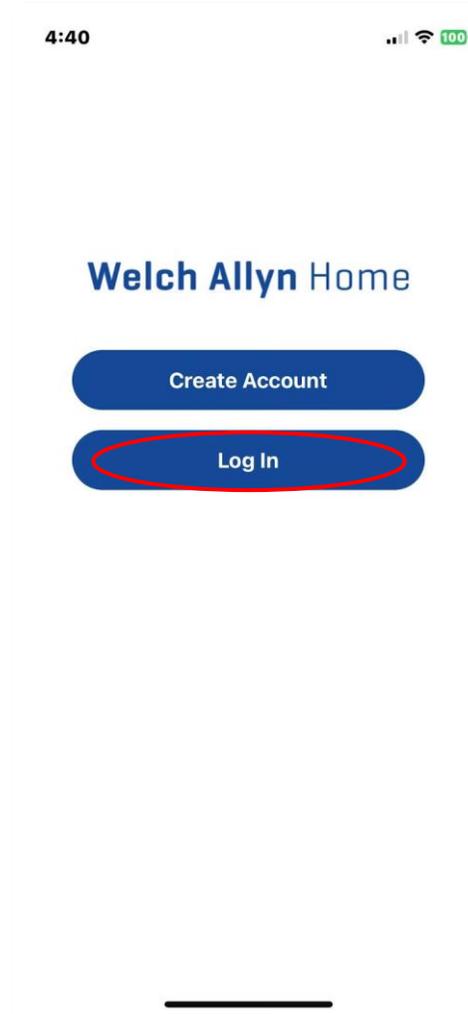
The Patient enters the **6-digit verification code** sent via email and hits **Enter**.

The patient must fill out all the **required fields** and hit **Create**.

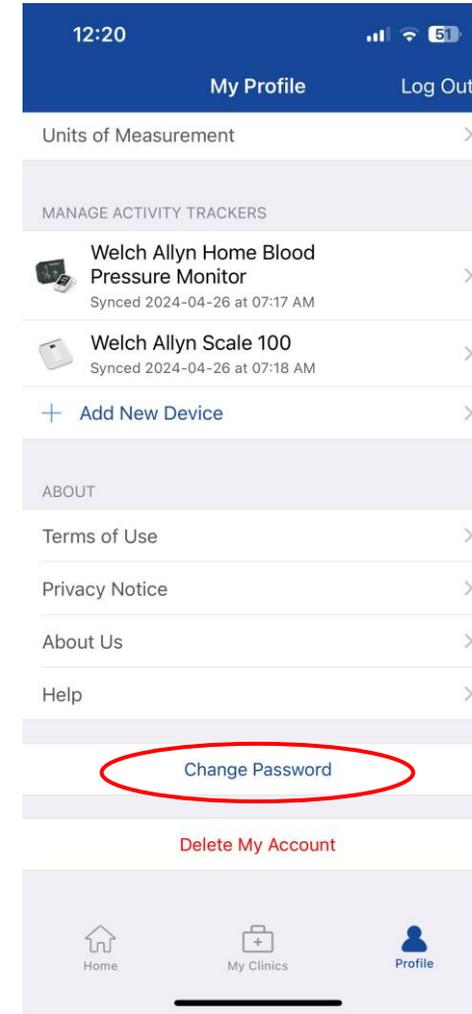
The patient is now logged in to the WAH mobile app and sees the Home tab.

New Patient – Created by Admin

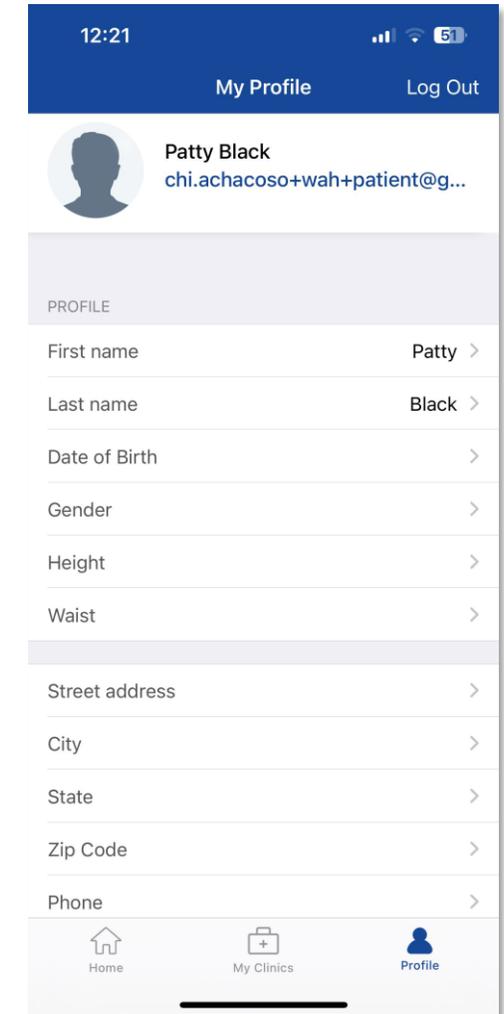
1. An Admin will create a new patient account and set a password for the Patient. Admin shares the password to the Provider/Clinician
2. Provider/Clinician shares the password to the Patient
3. Patient downloads the Welch Allyn Home App
4. Patient logs in the Welch Allyn Home App using the email and temporary password
5. Patient changes the password
6. Patient enters their profile information



The patient selects **Log In** and enters the email address and password shared by the Clinician.

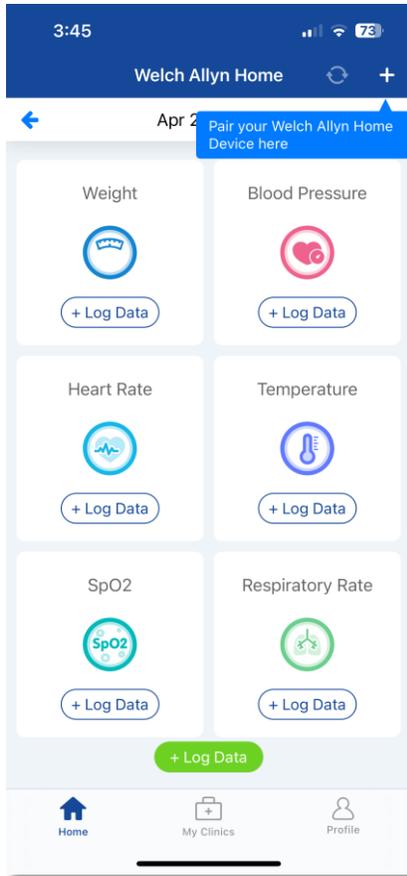


Tap **Profile** then scroll down and tap **Change Password**. Enter the needed information to change password and tap the **Update** button.

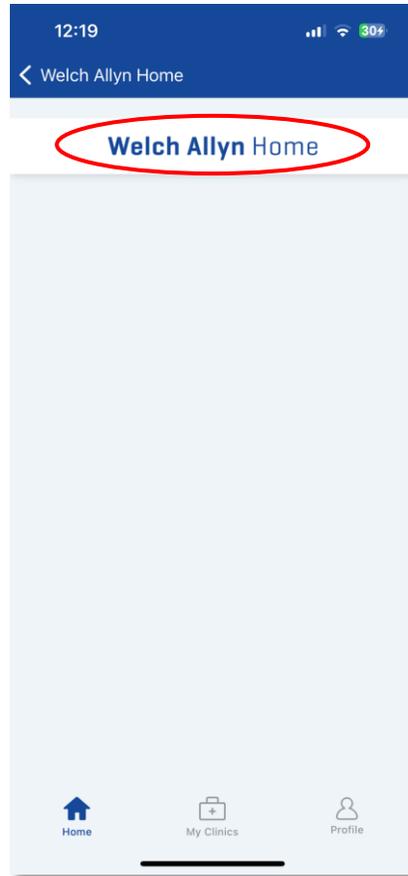


Still under **Profile**. Tap the detail to be updated. Enter the information and tap **Save**.

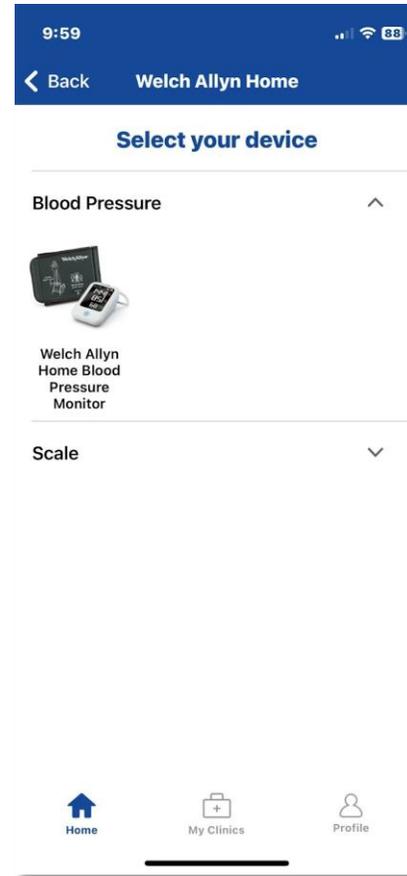
Pairing a Blood Pressure Monitor or Weight Scale



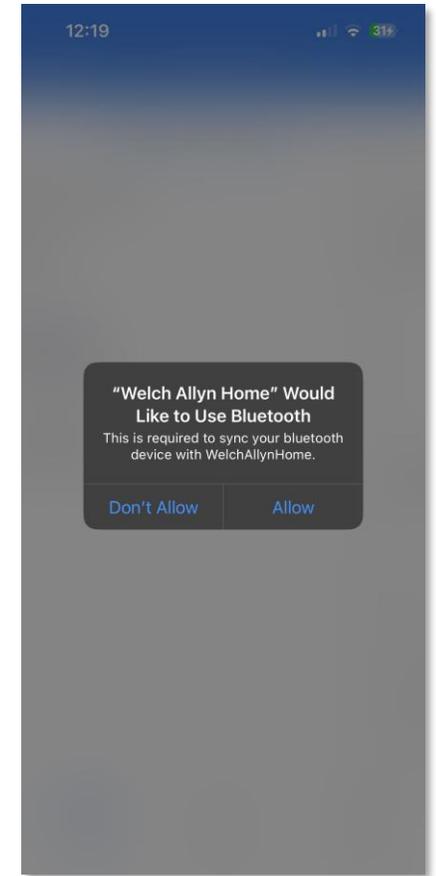
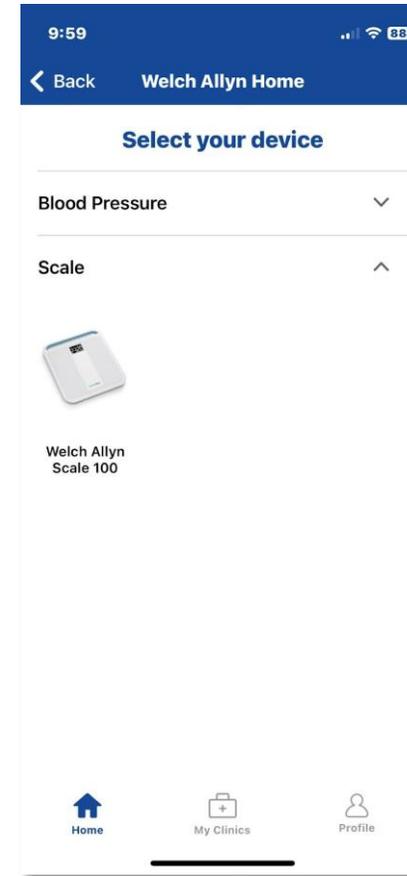
From the Home tab, tap the + icon on top right



Touch the **Welch Allyn Home** words/logo



After tapping the + icon, the patient has the option to select which specific WAH device to pair > ex. **Blood Pressure Monitor/ Scale**



Allow/ Accept related messages on iOS or Android for the device to access bluetooth



Pairing a Blood Pressure Monitor or Weight Scale – cont'd

To pair a blood pressure monitor, press AND HOLD the power button on the blood pressure monitor for 2 seconds to power on and pair the device until the Bluetooth icon starts blinking. Pairing typically takes 1-2 sec.



Tap **Pair Now**

To pair a weight scale, press AND HOLD the power button on the scale for 3 seconds to power on and pair the device until the Bluetooth icon starts blinking. Pairing typically takes 1-2 sec.

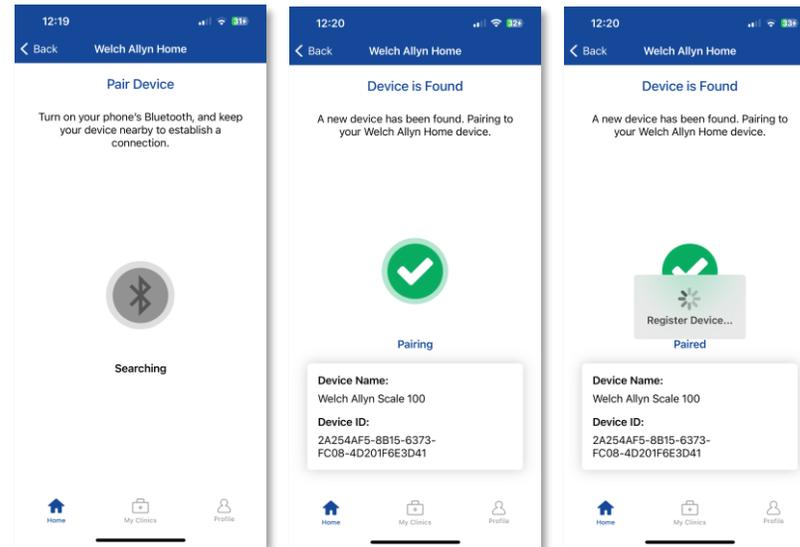


Tap **Pair Now**

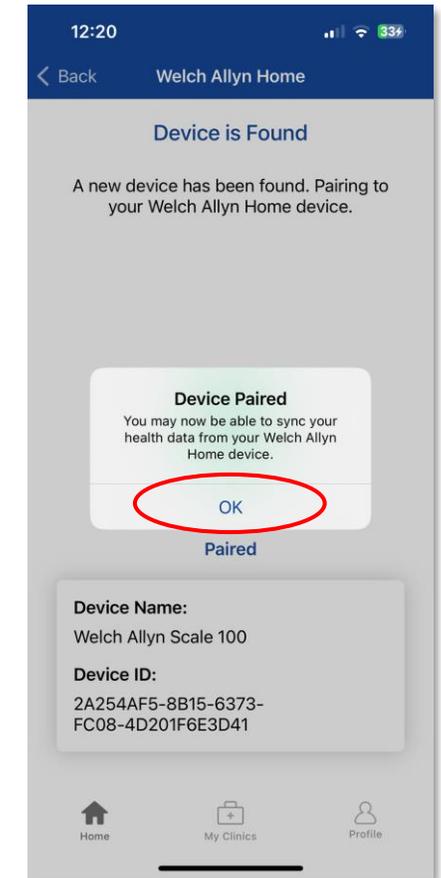
Pairing a Blood Pressure Monitor or Weight Scale – cont'd

Wait while multiple messages appear and until the **Device Paired** dialog box opens.

- *Searching* message appears on your mobile device.
- *Device is found* message displays.
- *Pairing* message displays.
- *Paired* message displays.
- *Register Device...* message displays.



Device Paired dialog box opens

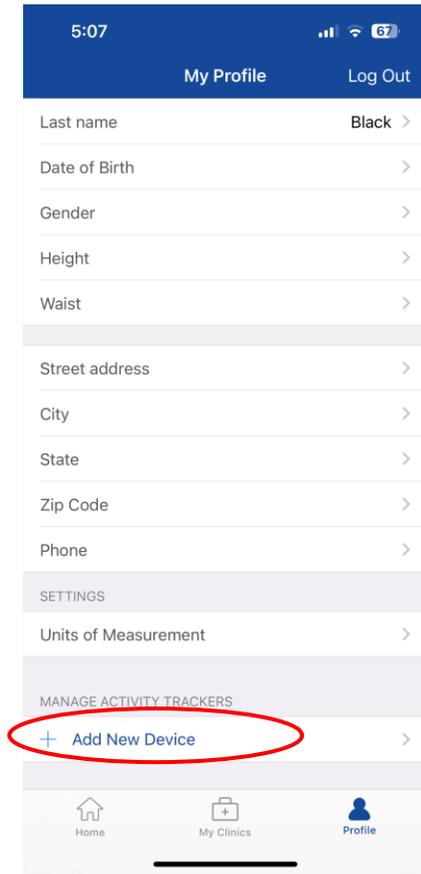


Tap **OK**

Adding a Device

Alternative Option in adding/ pairing a device:

Tap Profile > Scroll down to Manage Activity Trackers > Tap **+Add New Device**. Follow the next steps to pair the device

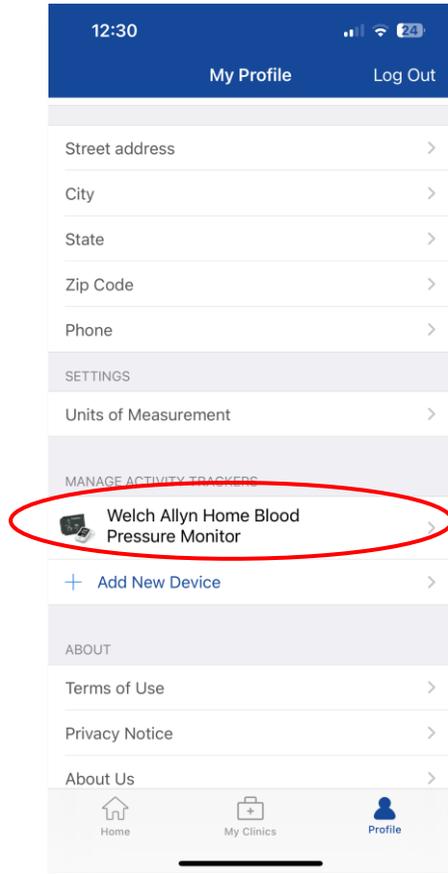


Pairing of a blood pressure monitor or weight scale can be done as part of the Patient's first-time login or later by completing the steps discussed previously.

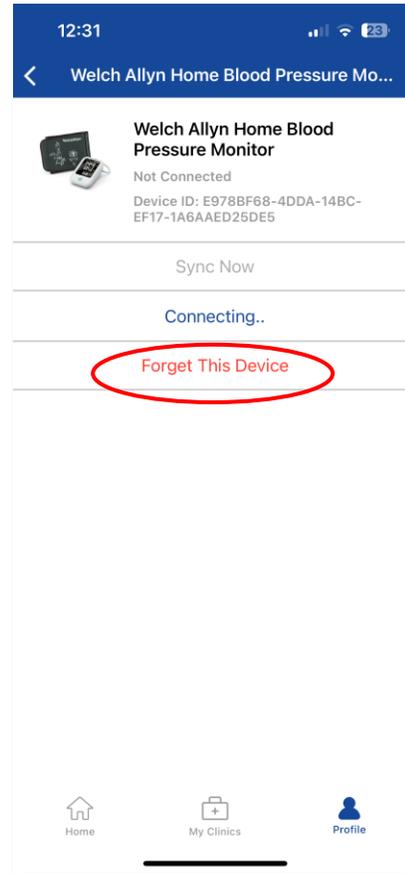
Note:

- Pairing is done in the App, not in the phone's Bluetooth Settings menu.
- Pairing the device to the app syncs the device time to the Patient's mobile device time.

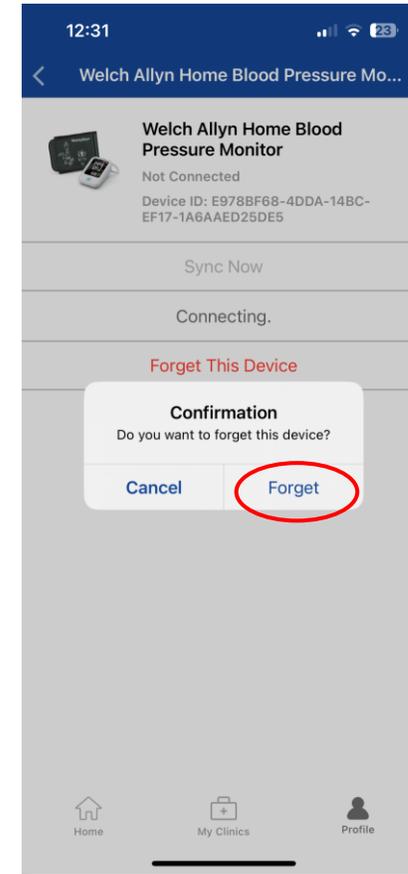
Removing/ Unpairing a Device



Under Manage Activity Trackers, select the device you would like to remove



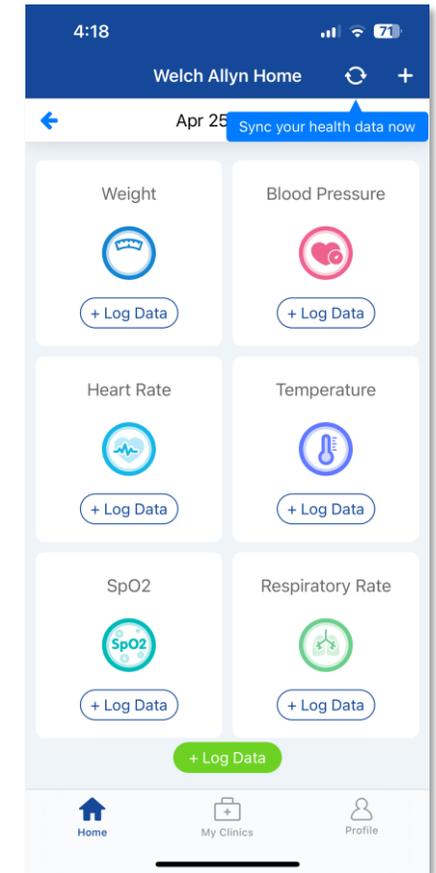
Tap **Forget This Device**



Tap **Forget** to remove/ unpair the device

Taking a Reading on a Paired Blood Pressure Device or Scale

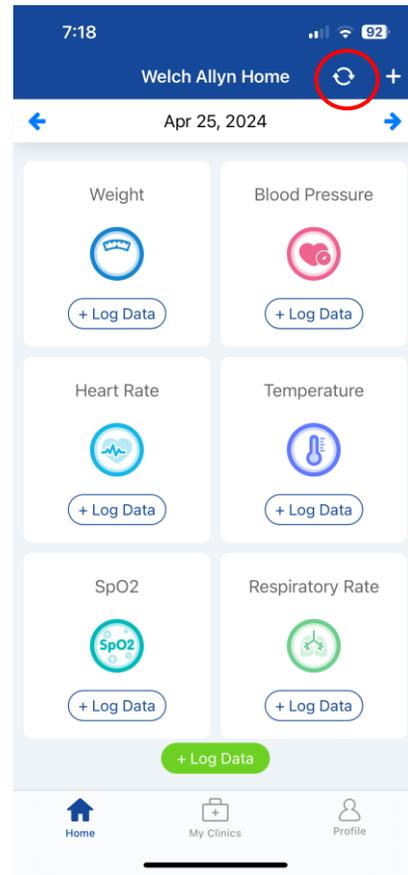
- After a device has been paired, a Patient can already sync their health data or opt to do it at another time.
- All readings taken on the device before pairing will not be saved in the Welch Allyn Home App.
- The App has to be open and logged into in order for the readings to transfer.
- Tap the circular **Sync All** icon next to the + icon to start syncing readings from the paired devices.
- Data transmission happens immediately after a reading.
- A check mark shows under the device name once syncing is successful.
- The sync all screen will wait for all paired devices to sync. The patient may opt to tap the back arrow on the upper left of the screen to skip syncing other devices and view the Home Screen.
- If Bluetooth (BT) communication does not happen for some reason, readings will stay in the device and will get sent with the next transmission.
- To transfer previously saved readings, a new reading would have to be made.
- Only the most recent reading will display on the Home dashboard tiles.



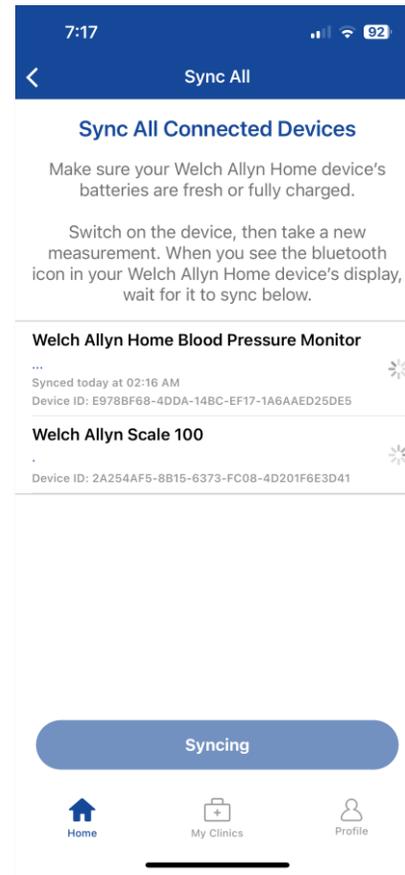
Tap the **Sync All** icon to start syncing readings

Taking a Reading on a Paired Blood Pressure Device

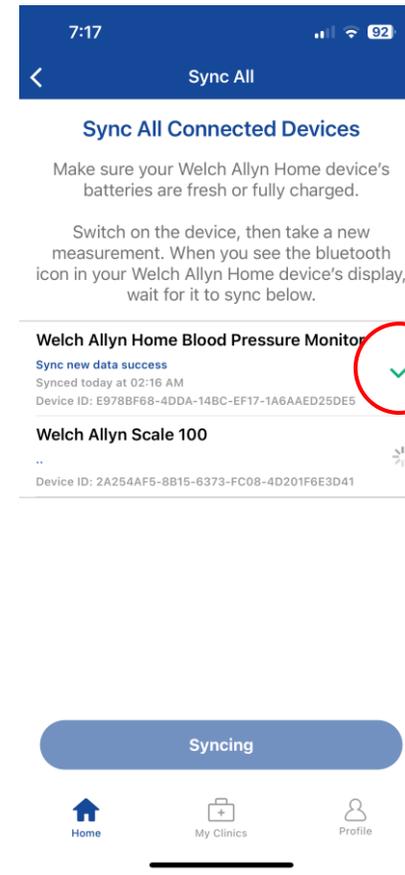
- It is advised that the patient place the blood pressure cuff on the arm and sit comfortably for 5 minutes before taking the reading.
- Press the power button on the monitor to begin the blood pressure measurement.



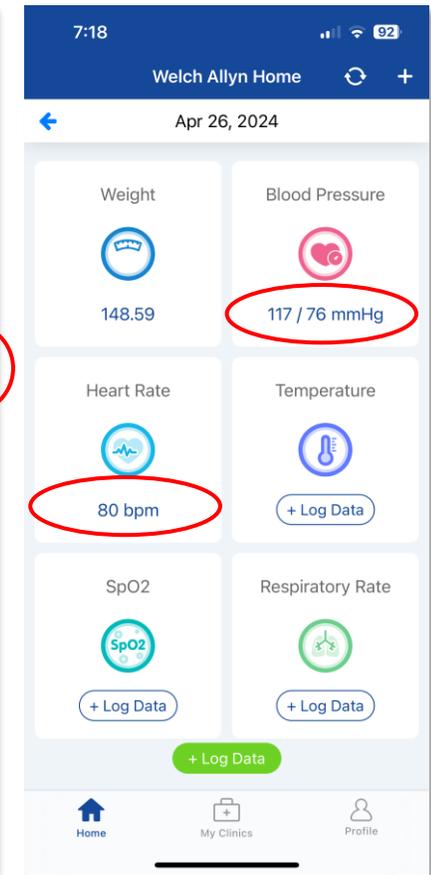
Tap the **Sync All** icon



The app is waiting for the paired devices to sync the readings



A check mark and a **Sync new data success** message will display together with the date and time when a reading was last synced

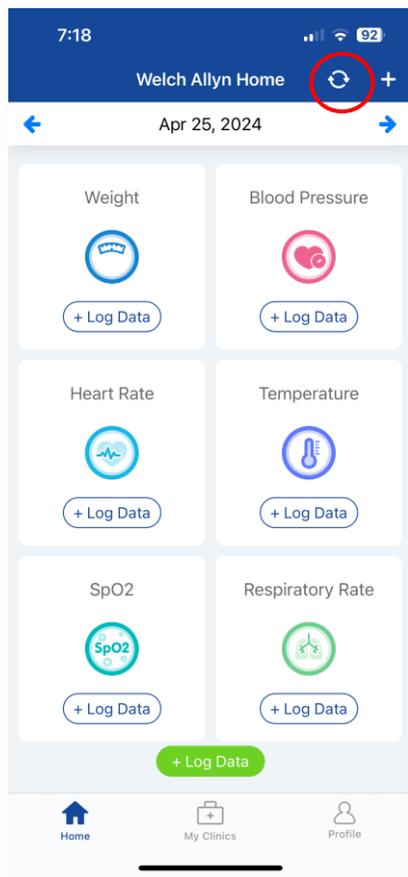


The blood pressure and heart rate readings will display on the Welch Allyn Home app health tiles

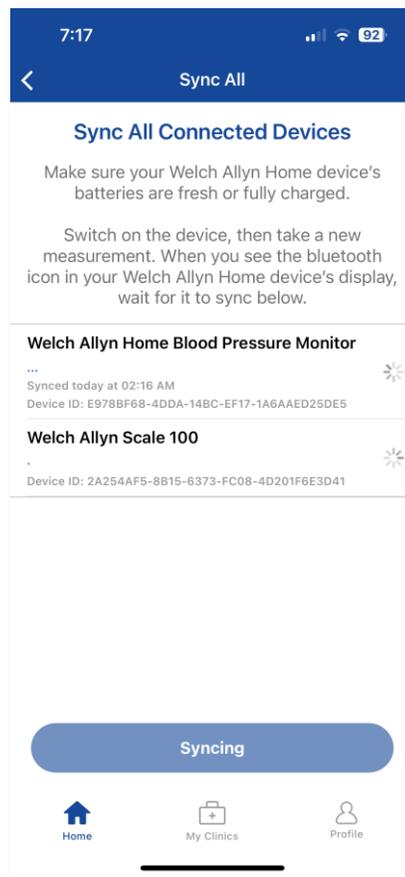
Taking a Reading on a Paired Weight Scale

- The scale should be placed on a flat hard surface. Step on the weight scale with bare feet.
- The weight scale automatically powers on and begins the measurement.
- The patient should stand still and keep full contact with the scale until the LCD stops blinking and displays the weight.
- It might be necessary to step on the scale again after the first reading specially if there is a significant difference from the last weigh in.

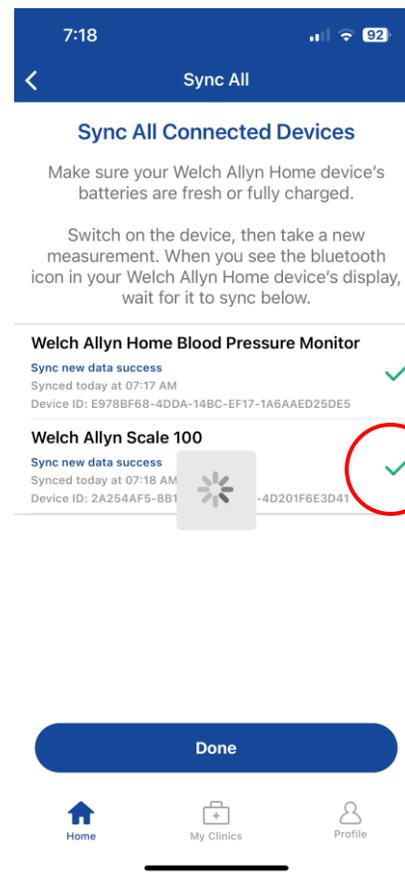
A variance range of +/- 0.1 exists between the scale reading and app display for weight due to the conversion formula between kilograms and pounds.



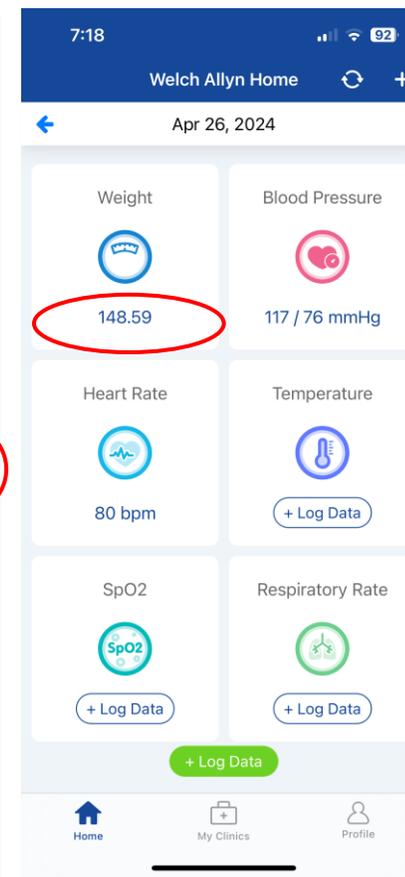
Tap the **Sync All** icon



The app is waiting for the paired devices to sync the readings



A check mark and a **Sync new data success** message will display together with the date and time when a reading was last synced



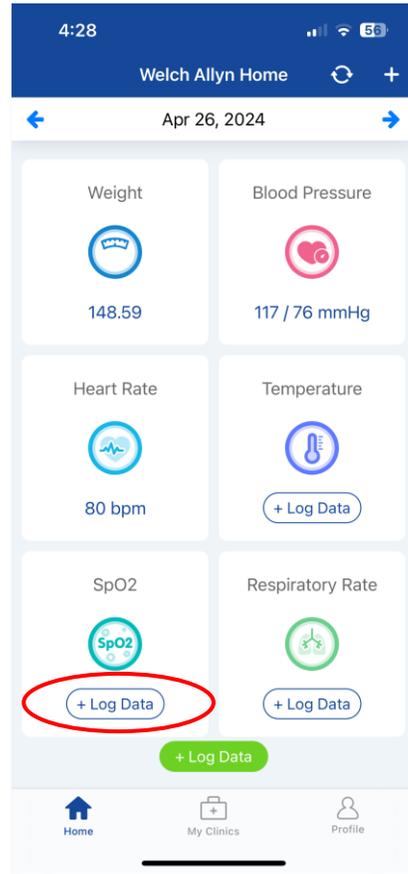
The latest weight reading will display on the Welch Allyn Home app health tile

Entering Readings Manually – Option 1

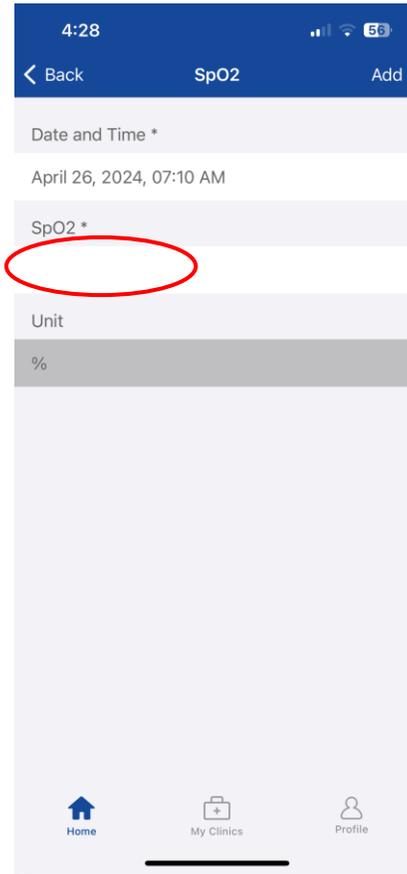
3 Ways: 1 of 3

Option 1 – No recorded reading for the day yet
Tap **+ Log Data** below the desired measurement type

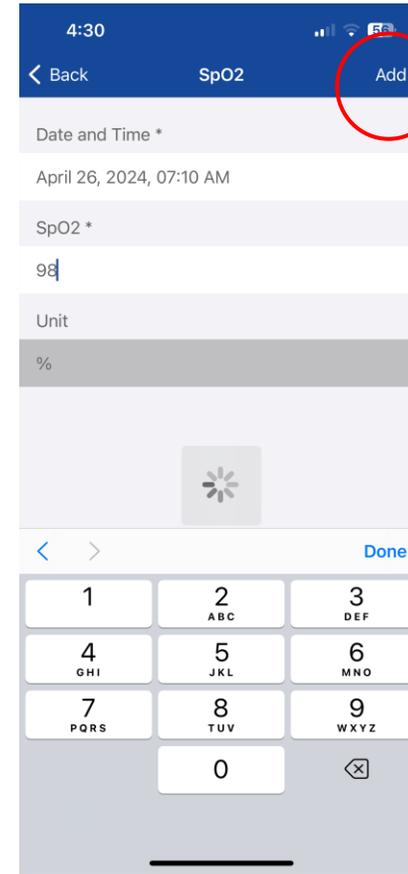
Note: Tapping outside the +Log Data button of the Tile would show the same screen as that of Option 1B



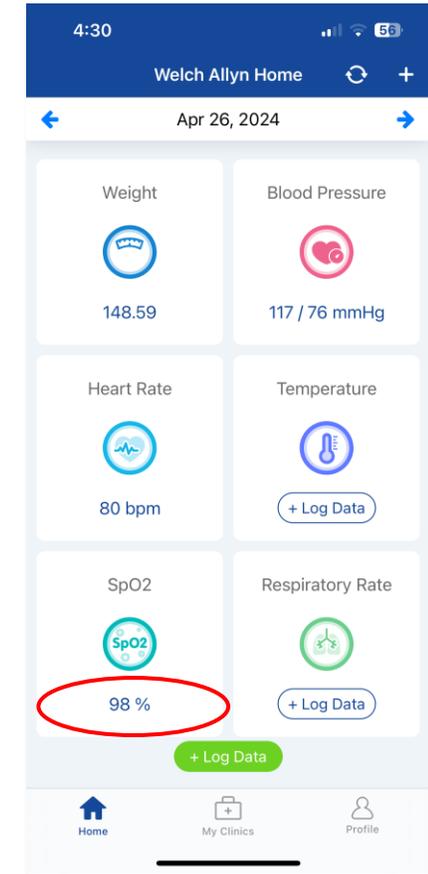
Tap **+Log Data** below the desired measurement type



Enter the reading



Tap **Add**



The reading will display on the Welch Allyn Home app health tile

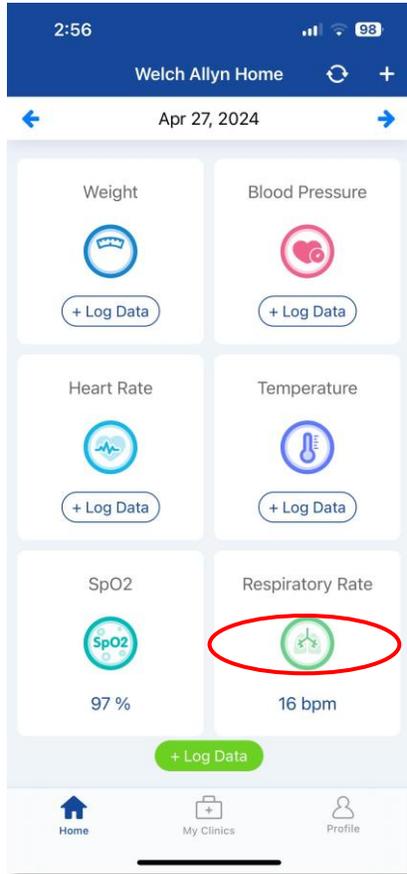
Entering Readings Manually – Option 2

3 Ways: 2 of 3

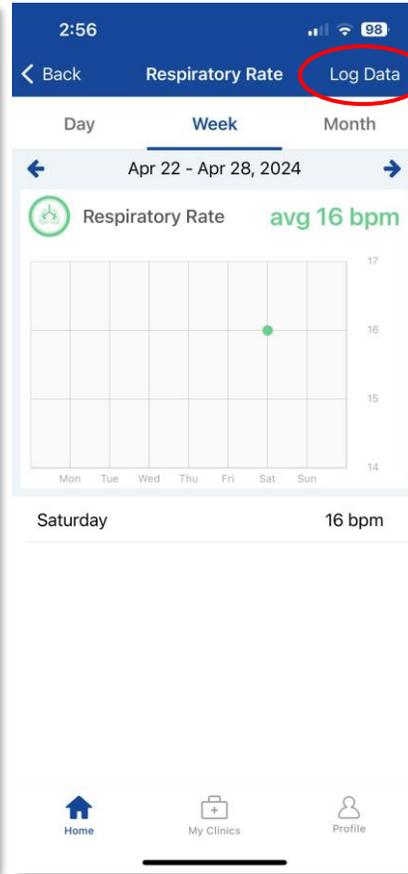
Option 2 – A reading shows on the health tile

Tap + Log Data below the desired measurement type

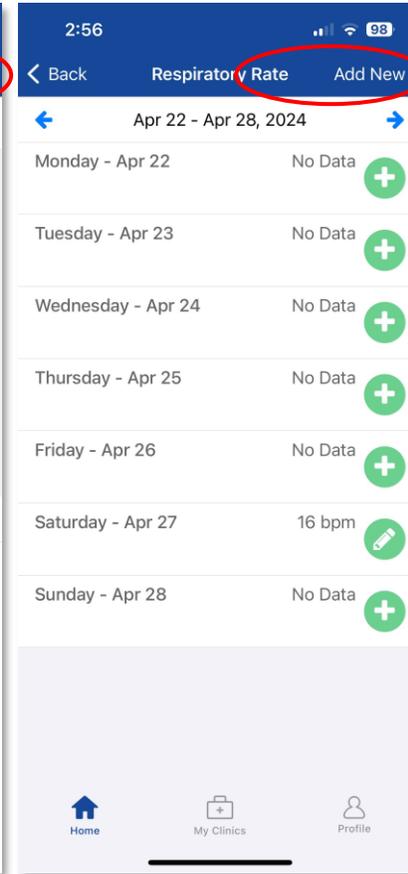
Note: Only the most recent reading will show on the Home dashboard health tile



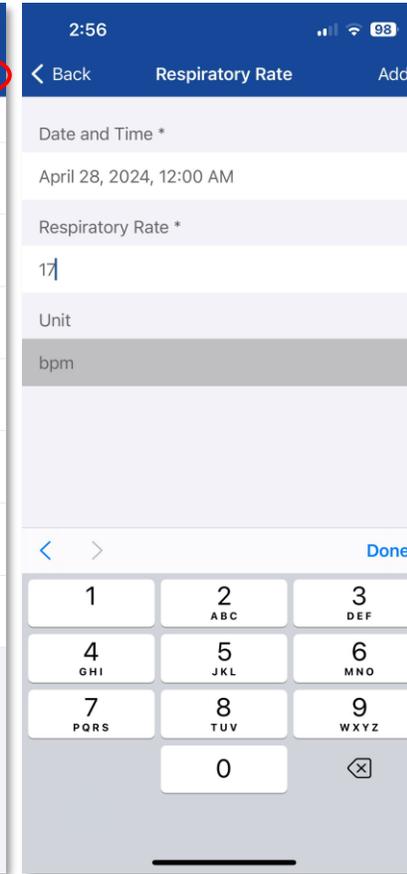
Tap anywhere within the tile of the desired measurement type



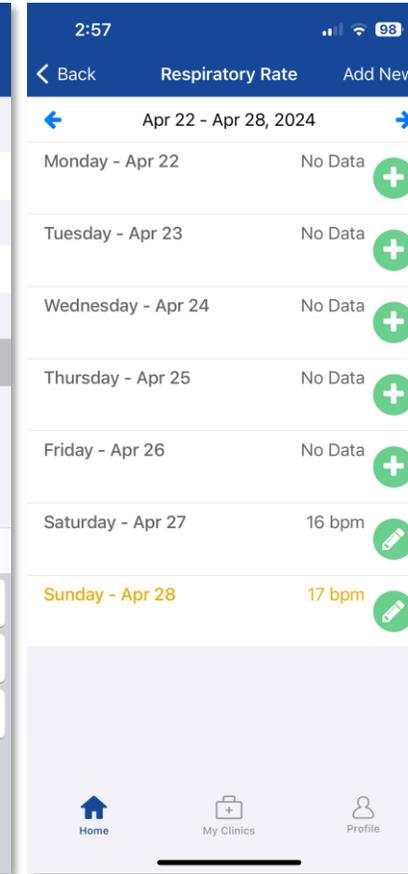
The week view will automatically display. Tap **Log Data**



Select the date to enter a reading by tapping the green + sign button. To add a new reading for



Enter the reading



The screen will go back to the previous screen.

Click back 2 x to show the Home screen where the reading should reflect

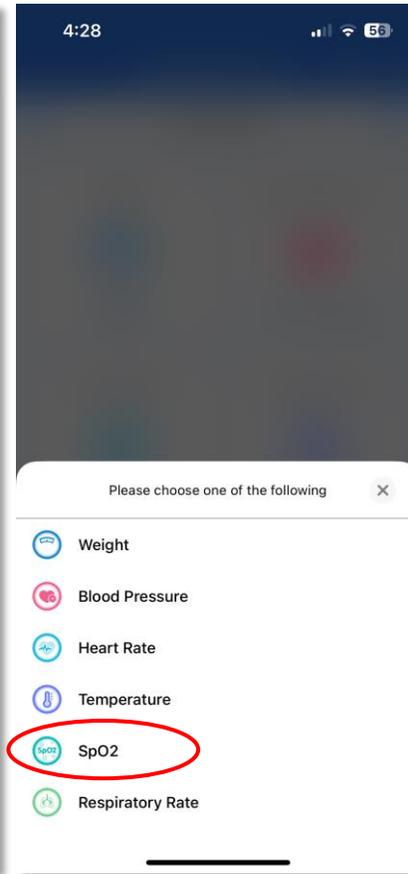
Entering Readings Manually – Option 3

3 Ways: 3 of 3

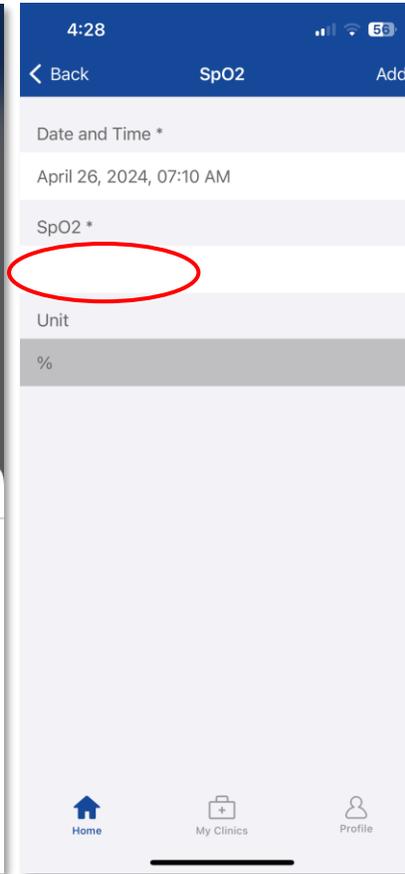
Option 3 –
Select from the
list of
measurement
types
Tap the green
+ Log Data
button at the
bottom part of
the screen



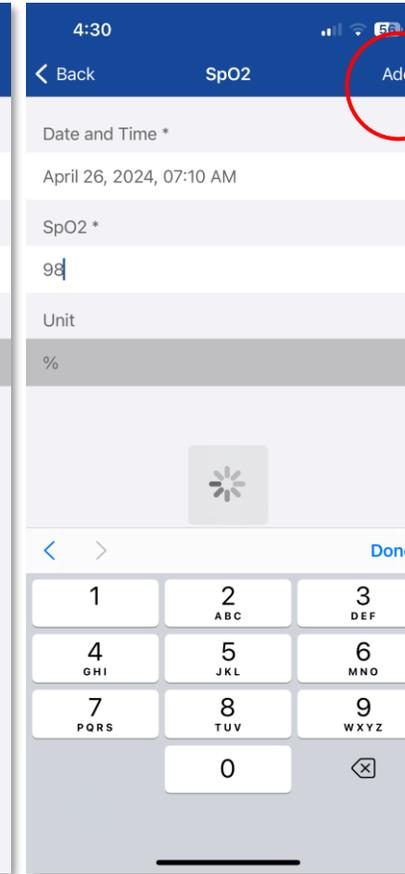
Tap anywhere within the tile of the desired measurement type



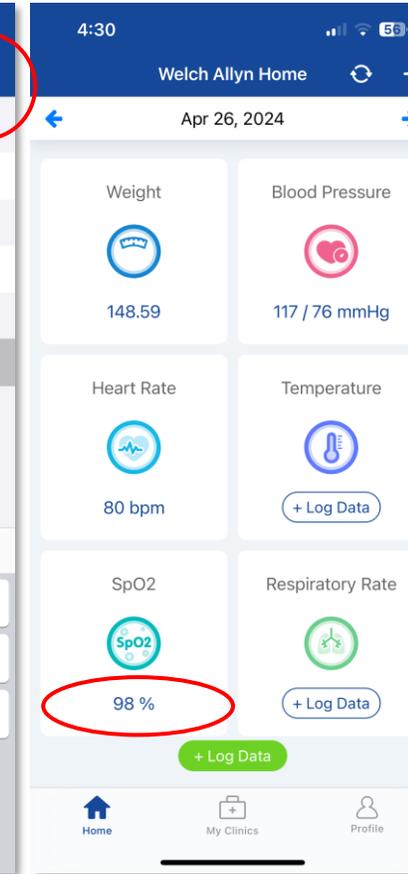
The week view will automatically display. Tap **Log Data**



Enter the reading



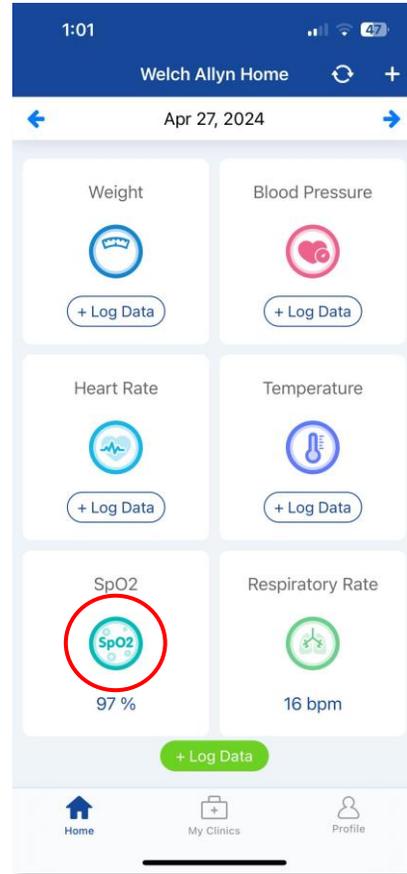
Tap **Add**



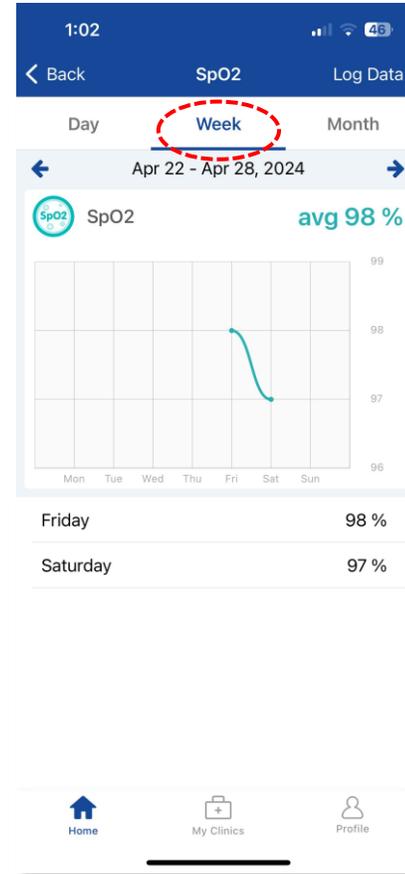
The reading will display on the Welch Allyn Home app health tile

Reviewing Readings

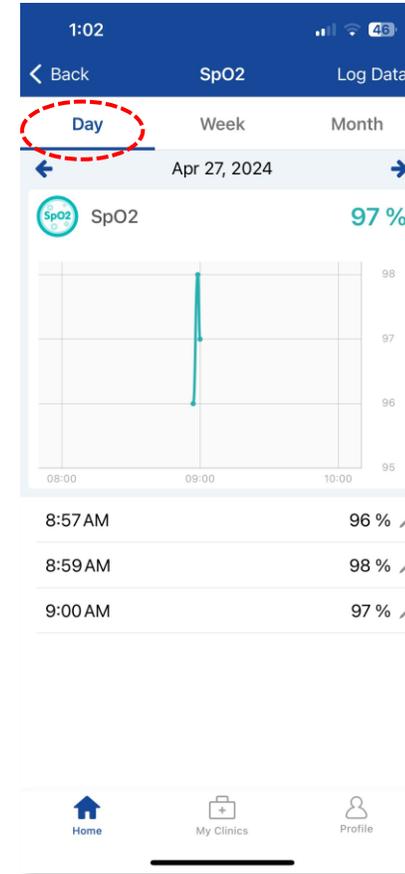
- Home Screen – the most recent readings of each measurement type is displayed.
- Readings may be filtered by touching **Day**, **Week** or **Month** view.
- Only the most recent reading for the day is used in the computation for the Average reading.
- To go back to the Welch Allyn Home screen, touch the back arrow on the upper left side of the screen.



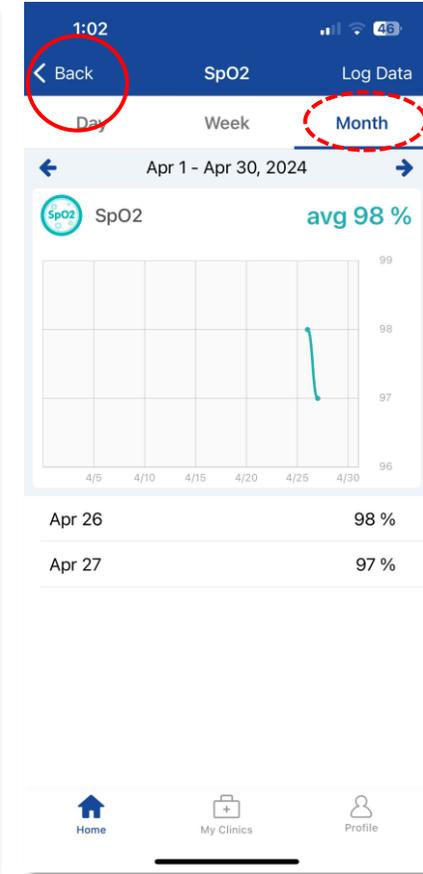
Tap on the icon of the measurement to view a detailed list of readings



By default, the screen shows the Week view.



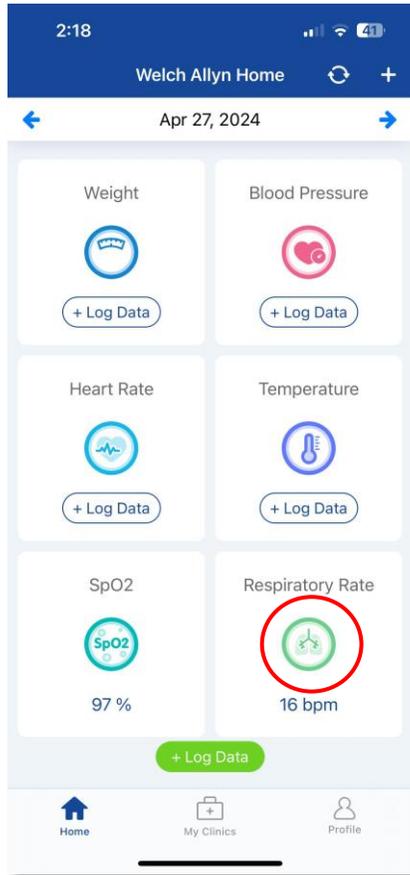
Day view



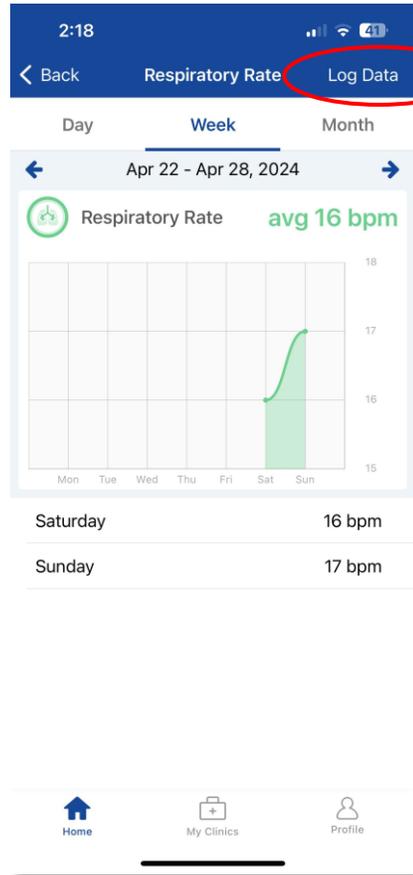
Month view

To go back to the **Welch Allyn Home** screen, touch the back arrow on the upper left side of the screen.

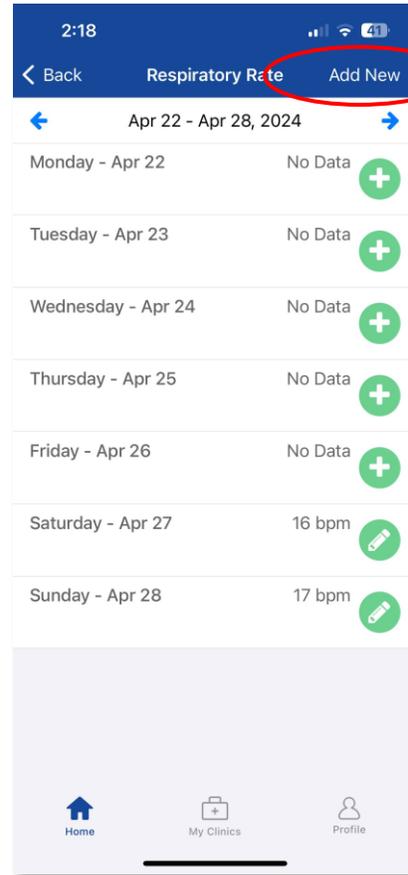
Editing Manually Logged Readings



Tap on the icon of the measurement to view a detailed list of readings



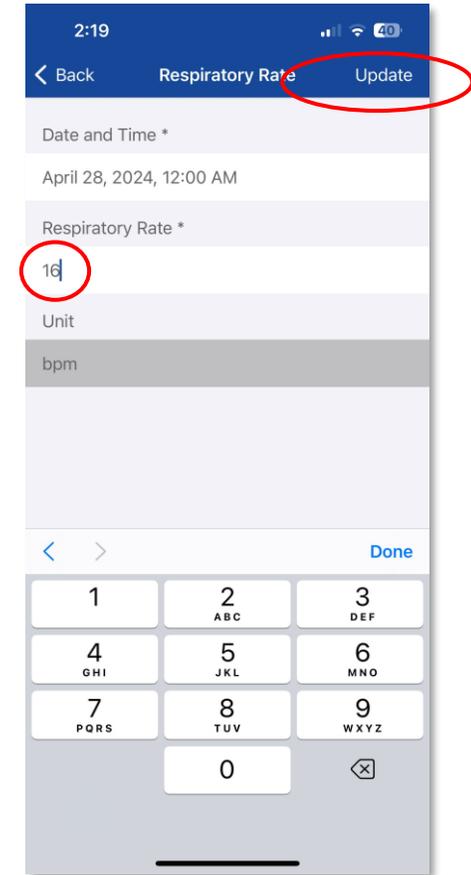
Tap **Log Data**



Select the date to edit the reading by tapping the green circle with pencil button.



Tap the pencil icon next to the reading to be edited



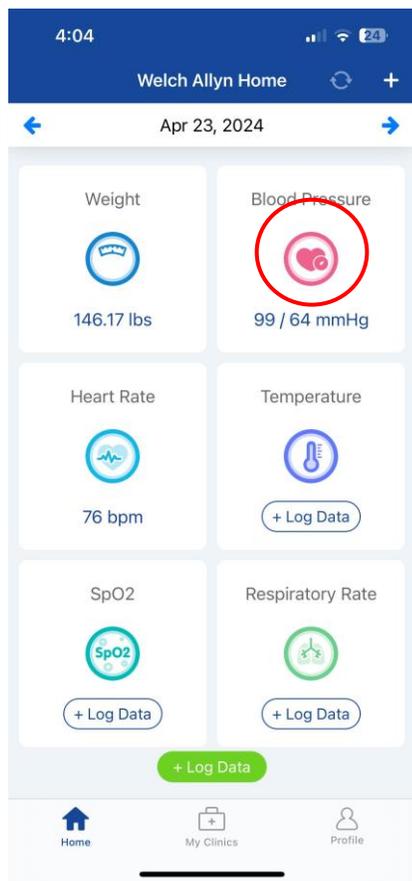
Enter the updated reading.

Tap **Update**

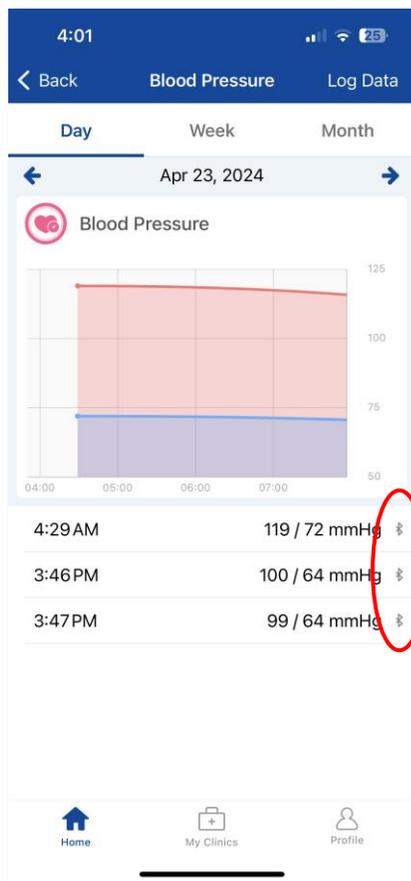
Note: Manually logged readings cannot be deleted on the app

Editing Synced Readings

- Synced readings cannot be edited nor deleted on the Welch Allyn Home App.
- Synced reading can be accepted or rejected on the Patient Portal only
- To know if a reading is synced or manually logged, go to the Day view of the measurement type



Tap on the icon of the measurement to view a detailed list of readings

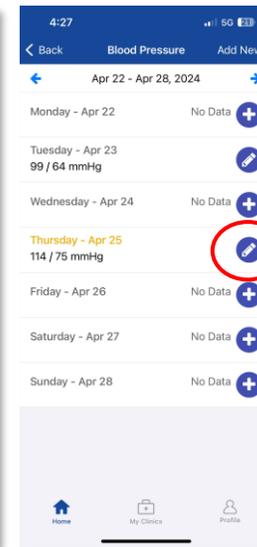


Tap **Day**

The Bluetooth icon next to the reading indicates that the reading was synced and not manually logged



Both the Week and Month views would not show the distinction of a synced reading from a manually logged reading

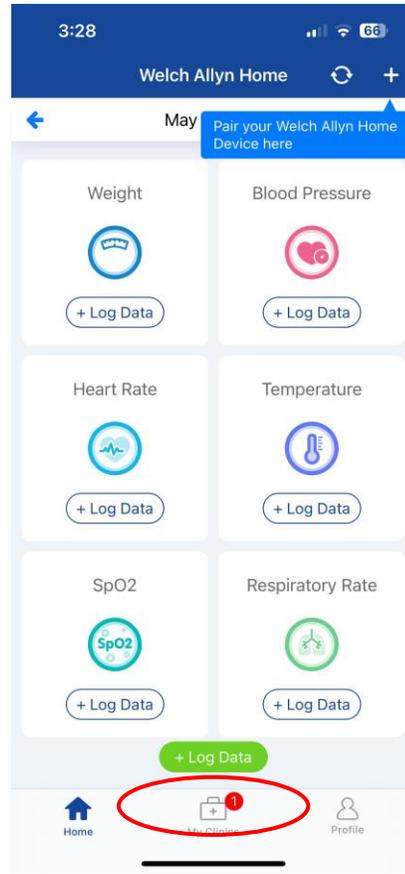


Though the pencil icon is not grayed out and clickable at first, the next screen where readings for the day are displayed would not let the patient edit the synced reading.

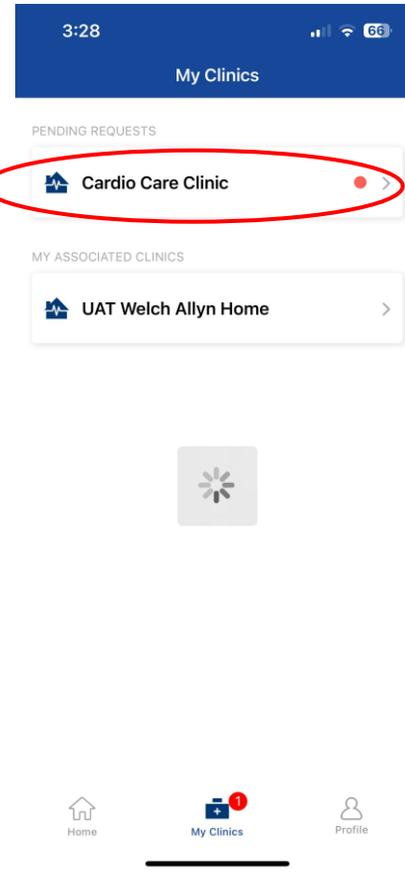
Accepting a Follower

- The patient must accept the Clinician’s invitation to follow their progress before they would be able to send their saved readings
- The Clinician’s invitation would be sent via email. This serves as a prompt for the patient to open their email and accept the invitation to follow.

NOTE: Not touching either Accept Request or Reject Request leaves the request in pending state to be acted on later.

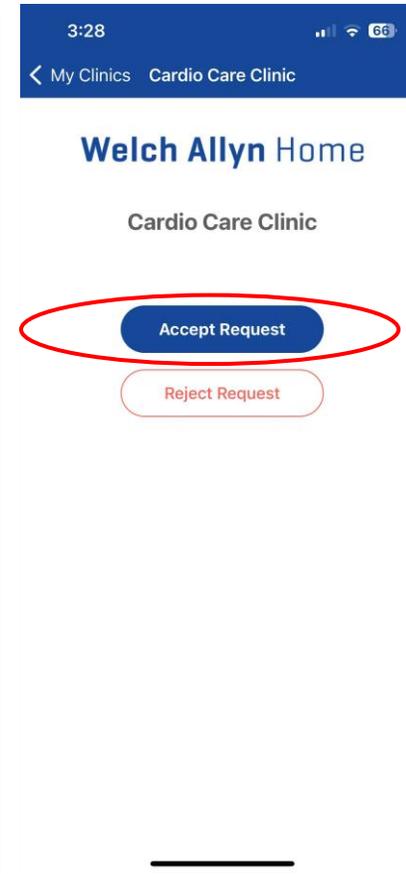


Tap **My Clinics** that has the notification icon (red circle with number)

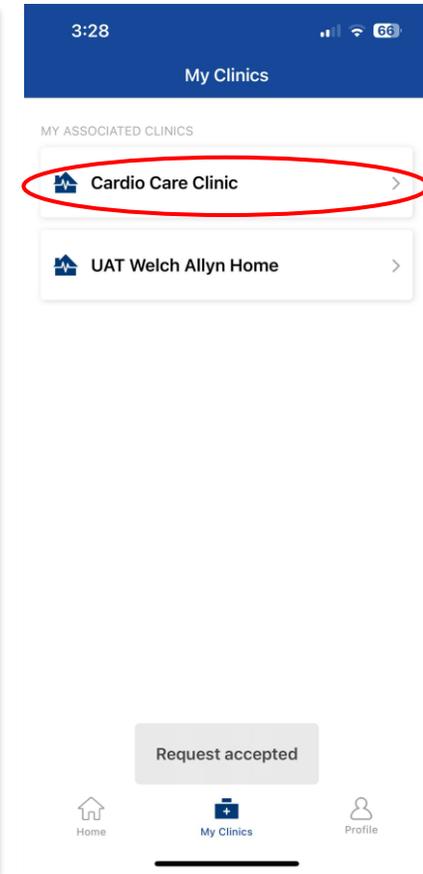


The **My Clinics** screen appears.

Tap the name of the Clinic under Pending Requests



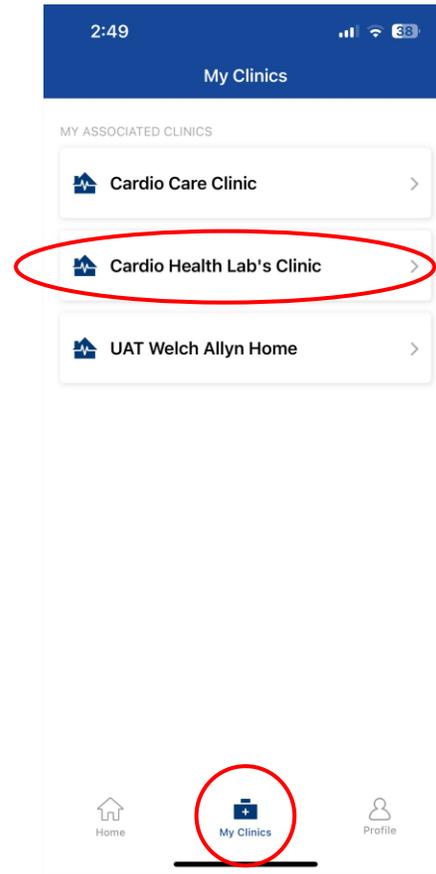
Tap the **Accept Request** button to allow the Clinician to view the patient readings, or **Reject Request** to decline the invitation



The name of the Clinic that was allowed to view the Patient’s progress will show under My Clinics.

Unsubscribing a Follower

- The Patient has the option to unsubscribe to a previously accepted Clinician invite to follow their progress.
- Unsubscribing a follower means that the Clinician will no longer be able to view the Patient's health information
- A Patient account created by an Admin would not have the option to unsubscribe to the Clinic

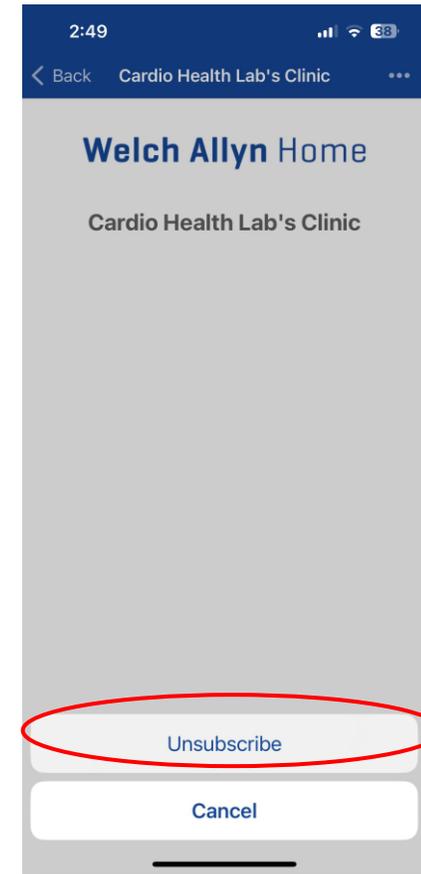


Tap the **My Clinics**

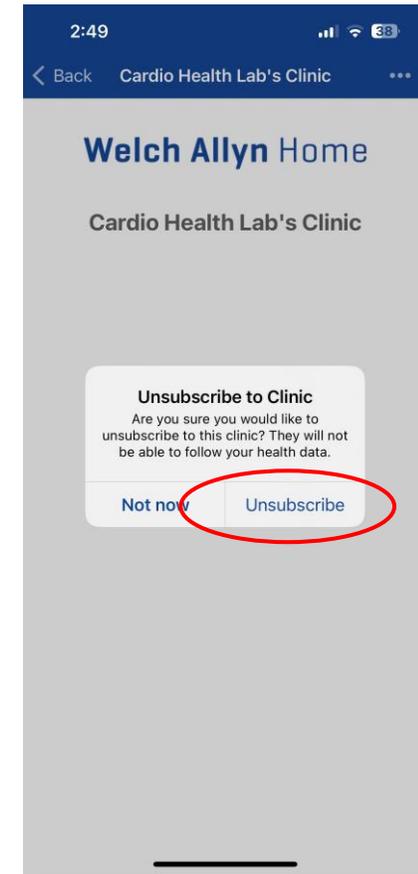
Tap the name of the Clinic to unsubscribe to



Tap the 3 dots on the upper right hand corner of the screen



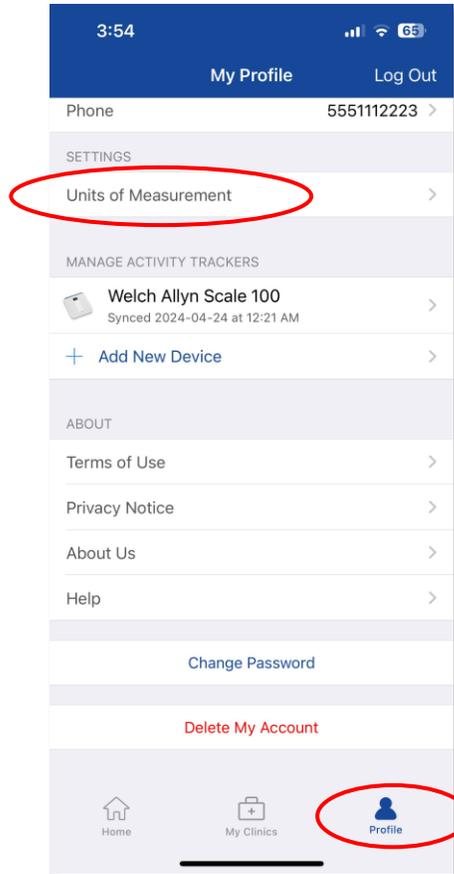
Tap **Unsubscribe**



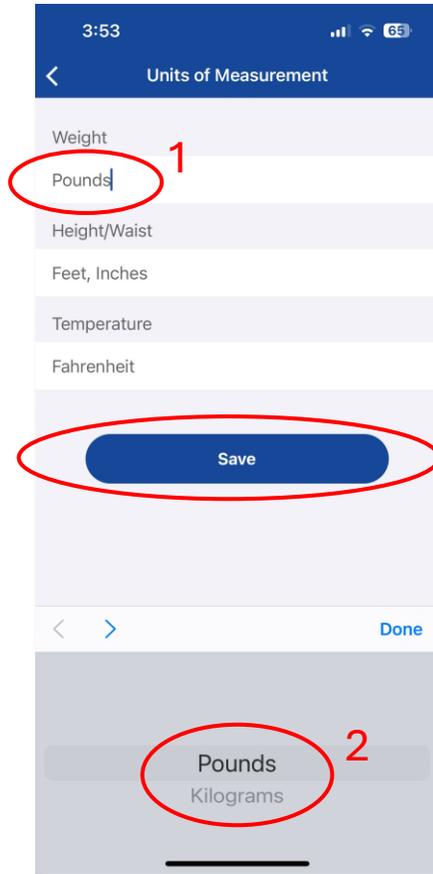
Tap **Unsubscribe** to confirm.

The Clinic will no longer see the Patient's data

Changing Units of Measure

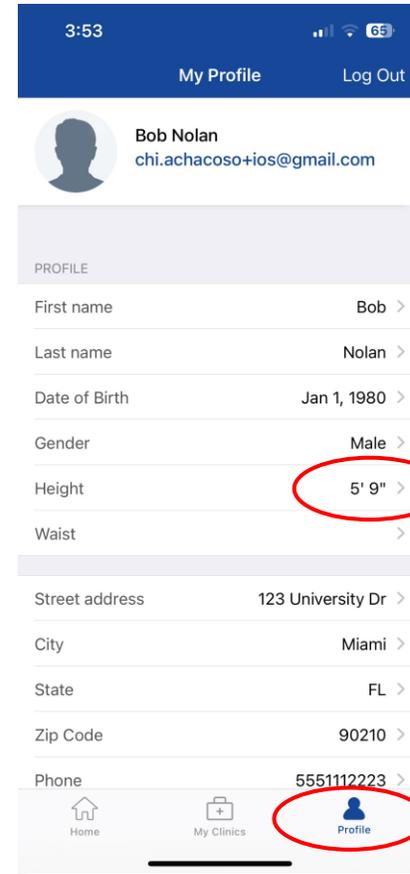


Tap the **Profile** icon
Scroll down and tap **Units of Measurement**

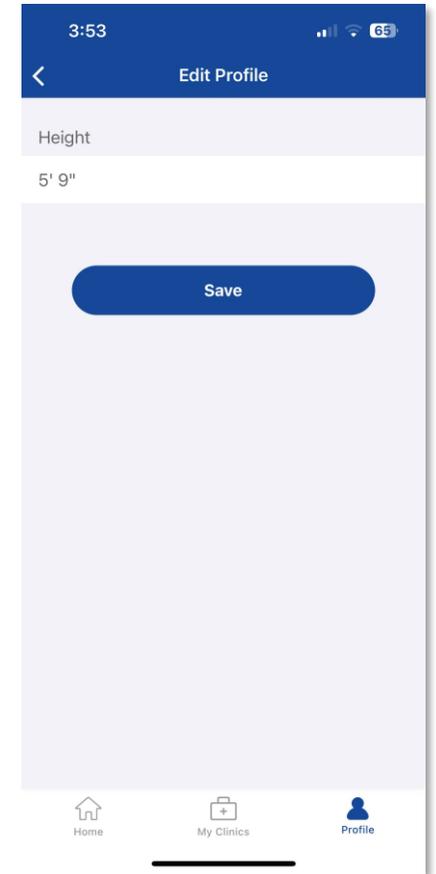


Tap any of the entries to change the units of measure
Tap the desired unit of measurement
Tap **Save**

Editing a Profile

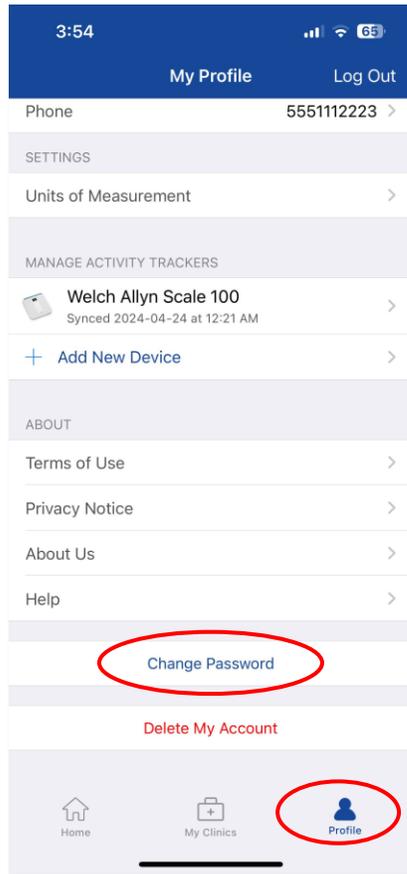


Tap the **Profile** icon
Tap the field to edit

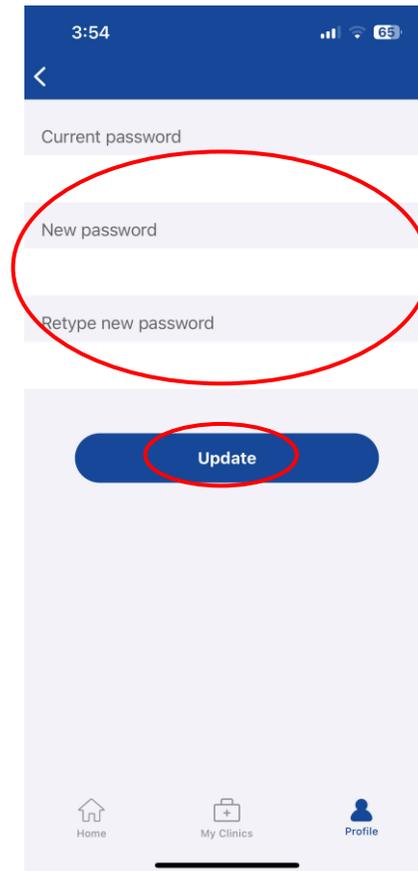


Make necessary changes
Tap **Save**

Changing a Password

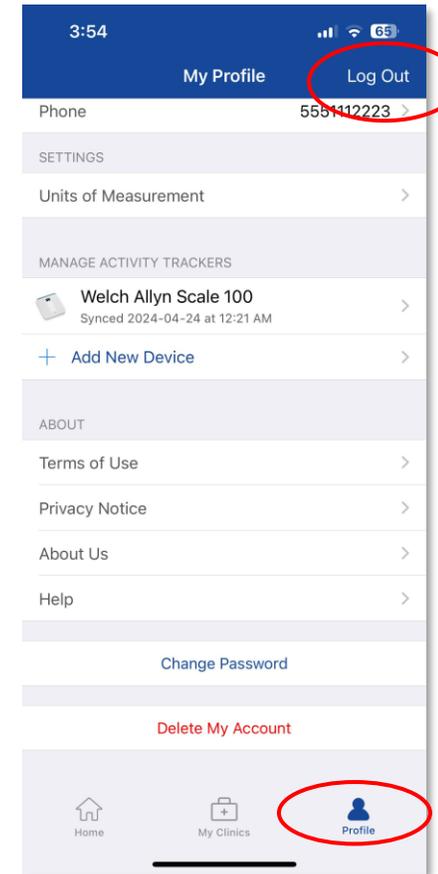


Tap the **Profile** icon
Tap **Change Password**



Type and retype a new password
Tap **Update**

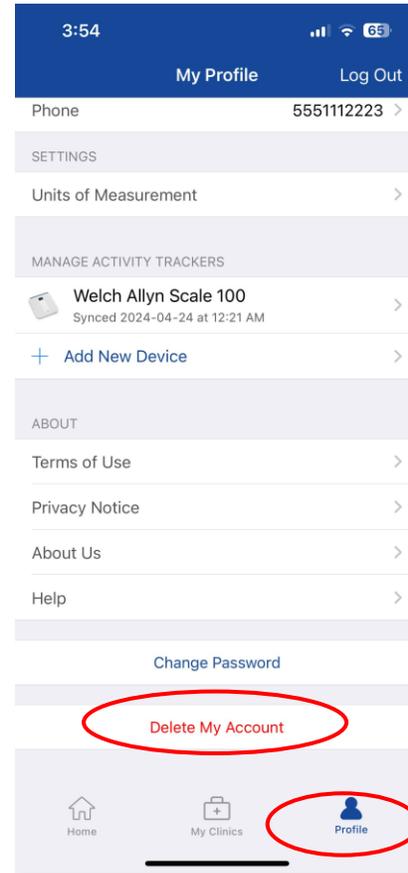
Logging Out of the App



Tap the **Profile** icon
Tap **Log out**

Deleting an Account

Deleting an account means that the Patient is opting out of the Welch Allyn blood pressure and weight monitoring program. The patient will no longer be able to log in to Welch Allyn Home, and all saved readings will be deleted.



Tap the **Profile** icon

Tap **Delete My Account**

About

- Log in credentials on the app are the same on the Patient Portal
- Readings on the Welch Allyn Home app will reflect on the Patient Portal and vice versa

	WAH App	WAH Patient Portal
Log in credentials	Same	same
Change of password	Yes	Yes
Pairing and syncing of readings	Yes	NA

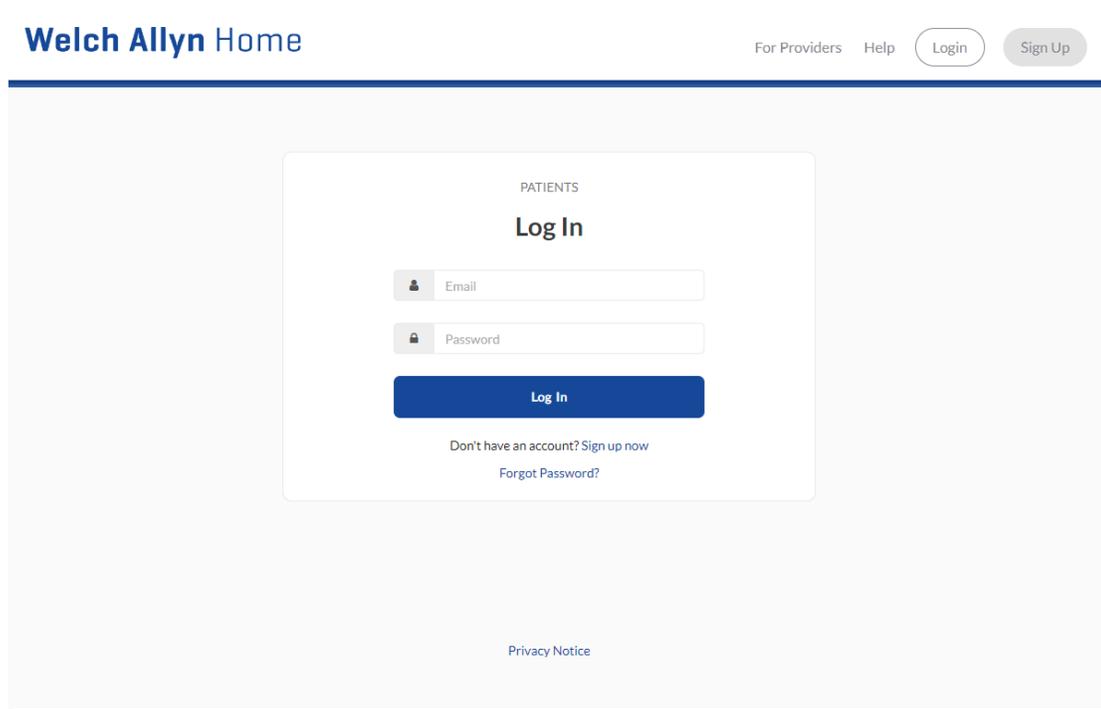
Tap the **Sync All** icon

The app is waiting for the paired devices to sync the readings

A check mark and a **Sync new data success** message will display together with the date and time when a reading was last synced

The latest weight reading will display on the Welch Allyn Home app web tile

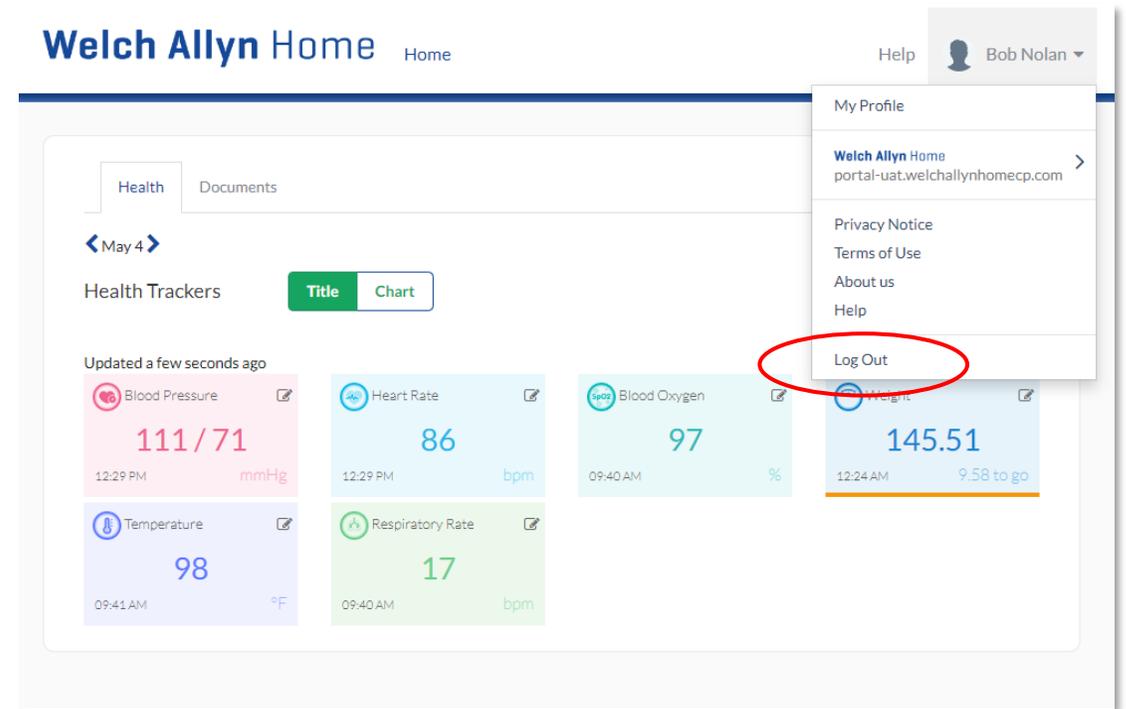
Logging In



Enter the log in credentials (email and password used to log in the Welch Allyn Home App)

Click **Log In**

Logging Out



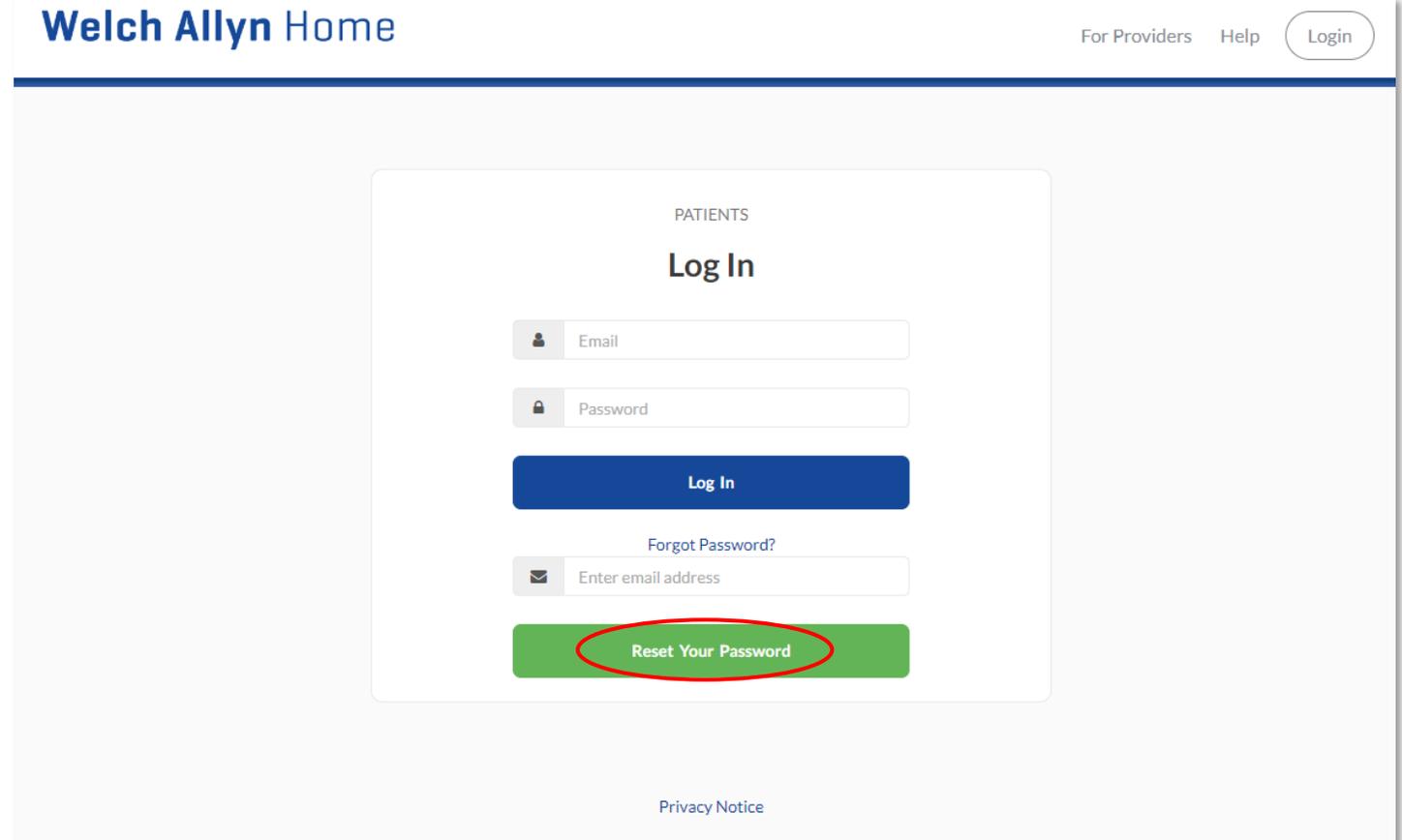
Click the user's name on the right side of the menu bar

Click **My Profile**

Click **Log Out**

Changing a Forgotten Password

- If the Patient forgets their password, then they can use the built-in **password reset** feature.
- An e-mail is sent with a link to reset their password.
- Check the Spam folder or refresh the inbox if the email is not received.
- Follow the screen prompts to reset the password
- If the Patient forgot the password of their email and can no longer access it, a password can be generated by the Admin for the Patient. The Patient is advised to change their password upon log in.



Welch Allyn Home

For Providers Help Login

PATIENTS

Log In

Email

Password

Log In

[Forgot Password?](#)

Enter email address

Reset Your Password

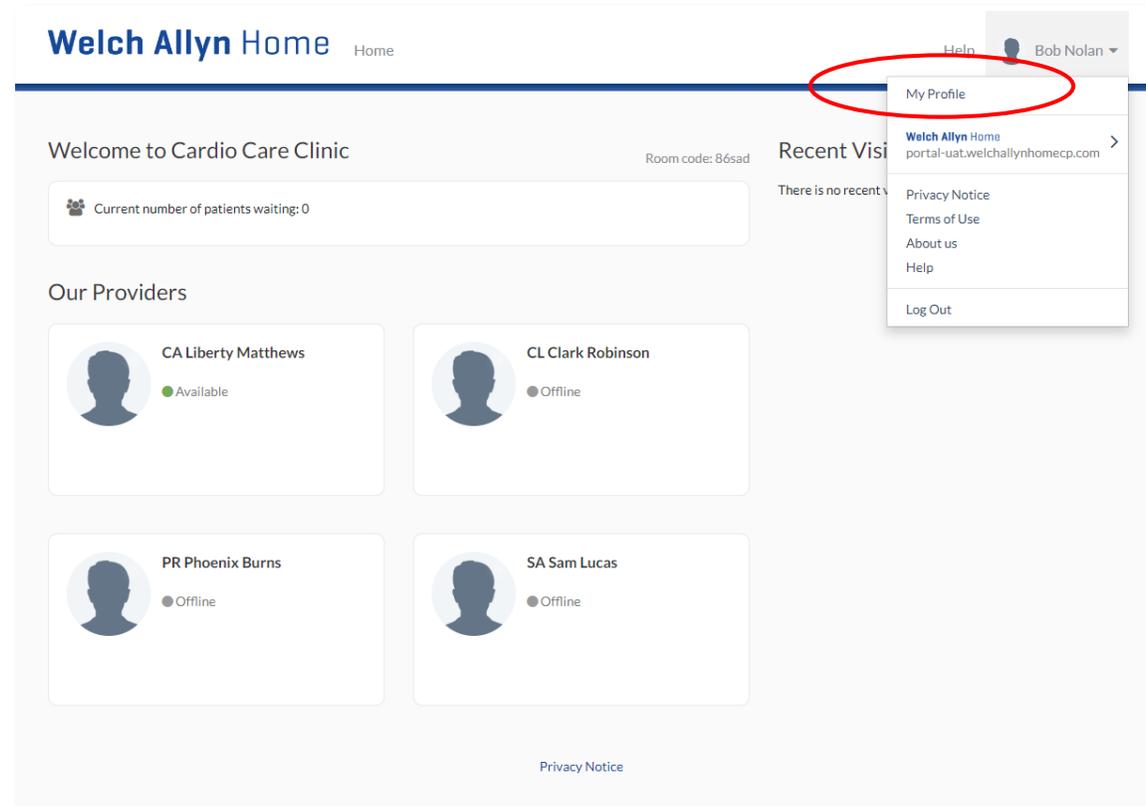
[Privacy Notice](#)

Enter the email address on the box under Forgot Password?

Click **Reset Your Password**

Changing a User Profile and Password Inside the Portal

- All changes made in the portal will also reflect in the app
- Updating/changing the password through the **My Profile** screen will not send an email to the Patient.

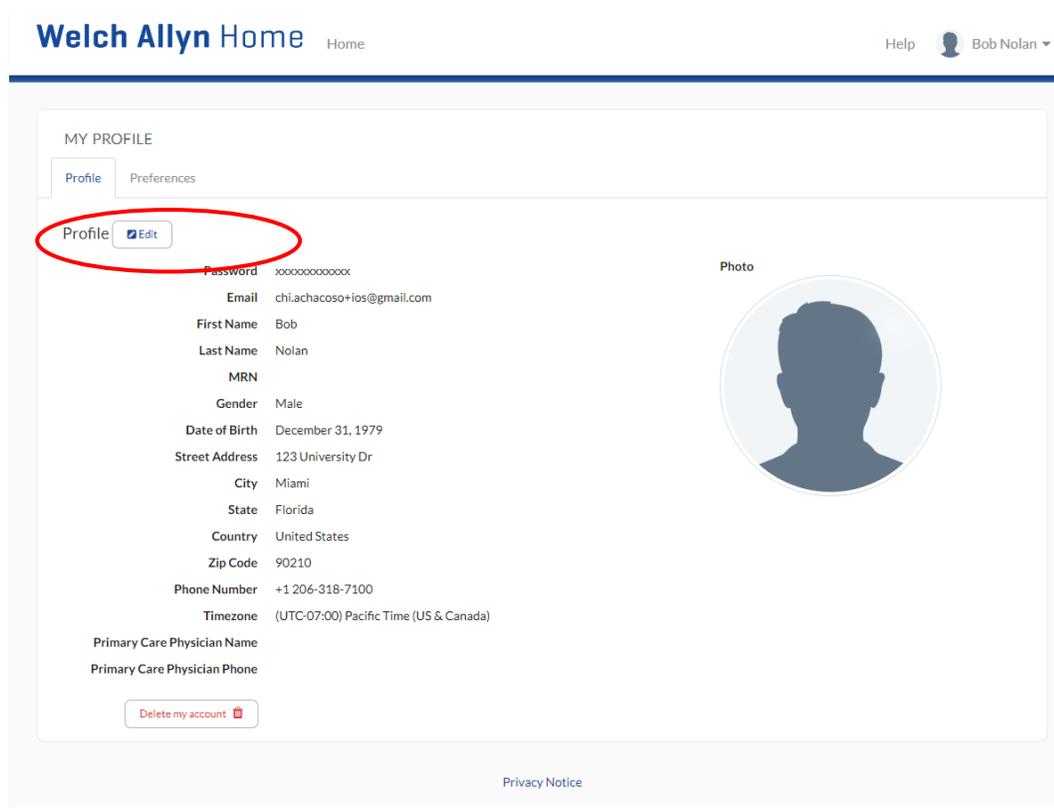


Click the user's name on the right side of the menu bar

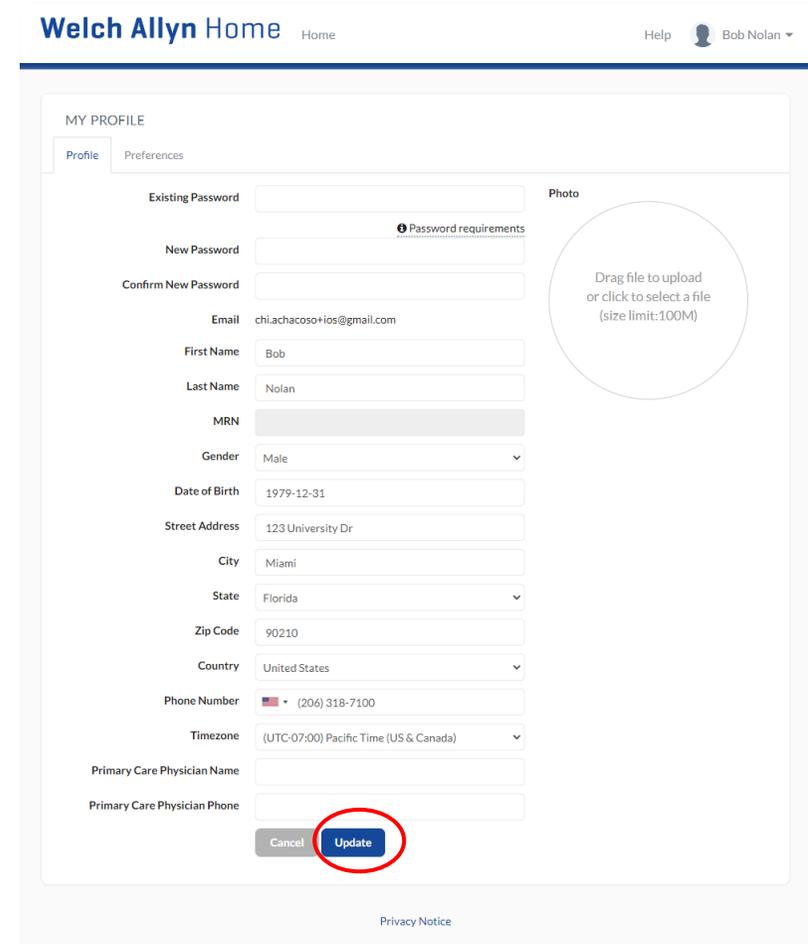
Click **My profile**

*Continued on the next page >

Changing a User Profile and Password Inside the Portal – cont'd



Click **Edit**



Update password and/or update the profile information

Click **Update** to save the changes



Updating Health Readings on the Portal

- In the Patient Portal, synced and manually logged readings from the Welch Allyn Home App can be:
 - Accepted/ rejected
 - Edited
 - Deleted
- Readings can be manually added on the Patient Portal, and will reflect on the Welch Allyn Home app

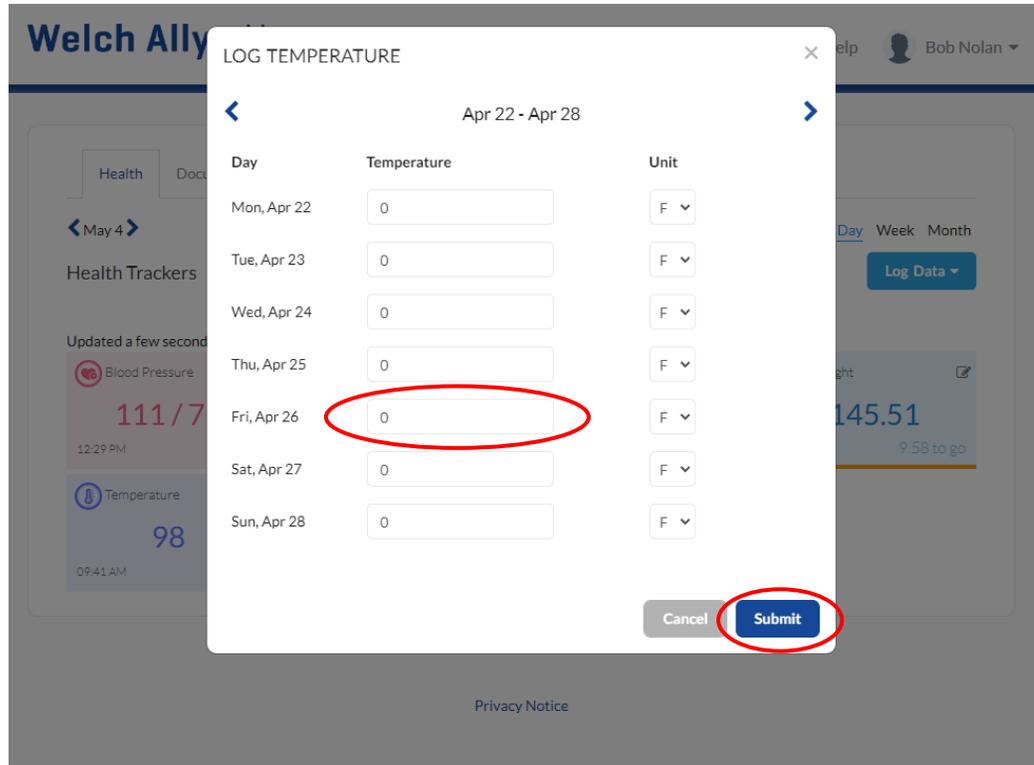
The screenshot displays the Welch Allyn Home Patient Portal interface. At the top, there is a navigation bar with 'Welch Allyn Home' and 'Home' on the left, and 'Help' and a user profile 'Bob Nolan' on the right. Below the navigation bar, there are tabs for 'Health' and 'Documents'. A date selector shows 'May 4' with left and right arrows. To the right of the date selector are view options: 'List View', 'Day', 'Week', and 'Month'. Below these is a 'Health Trackers' section with a 'Title' and 'Chart' filter. A 'Log Data' button is circled in red, and a dropdown menu is open below it, listing various health measurements: Weight, Heart Rate, Blood Pressure, Blood Oxygen, Temperature, and Respiratory Rate. The main content area shows several health measurement tiles, each with a pencil icon for editing. The tiles are: Blood Pressure (111/71 mmHg, 12:29 PM), Heart Rate (86 bpm, 12:29 PM), Blood Oxygen (97%, 09:40 AM), Temperature (98°F, 09:41 AM), and Respiratory Rate (17 bpm, 09:40 AM). A 'Privacy Notice' link is visible at the bottom of the page.

2 Options:

- 1 – Click the pencil icon on the selected health measurement tile to be updated
- 2 – Click Log Data and select the health measurement to be updated from the dropdown menu

Updating Health Readings on the Portal – cont'd

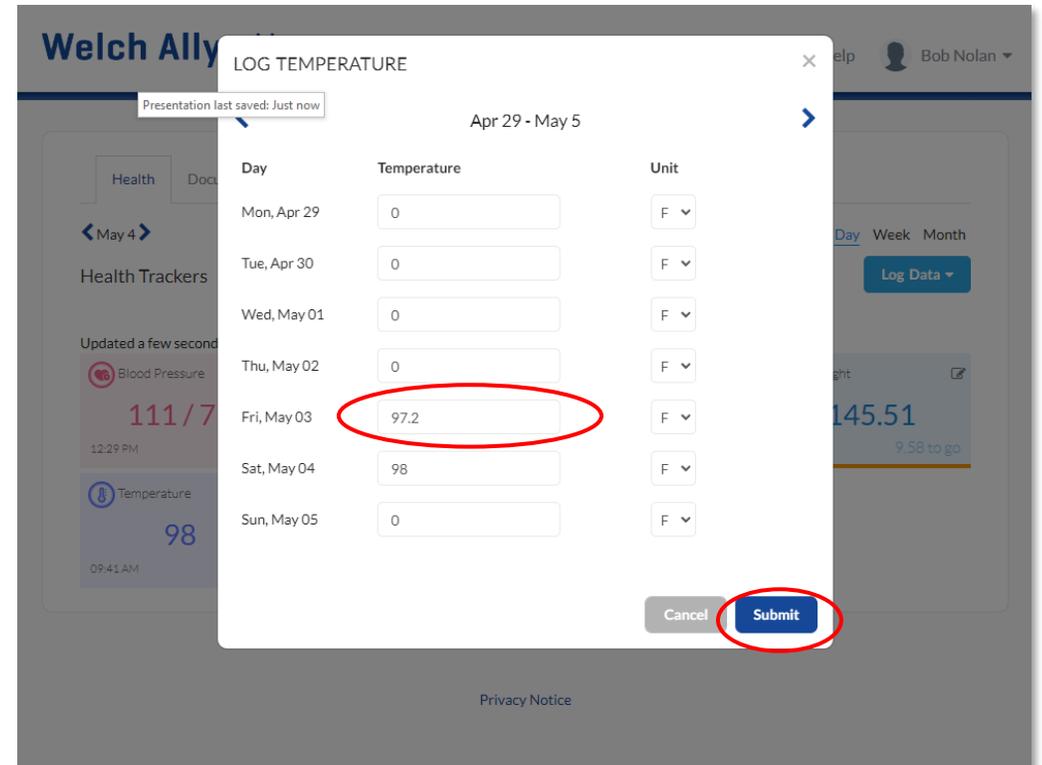
Manually logging a new reading



Enter the reading

Click **Submit**

Editing/Deleting an existing reading

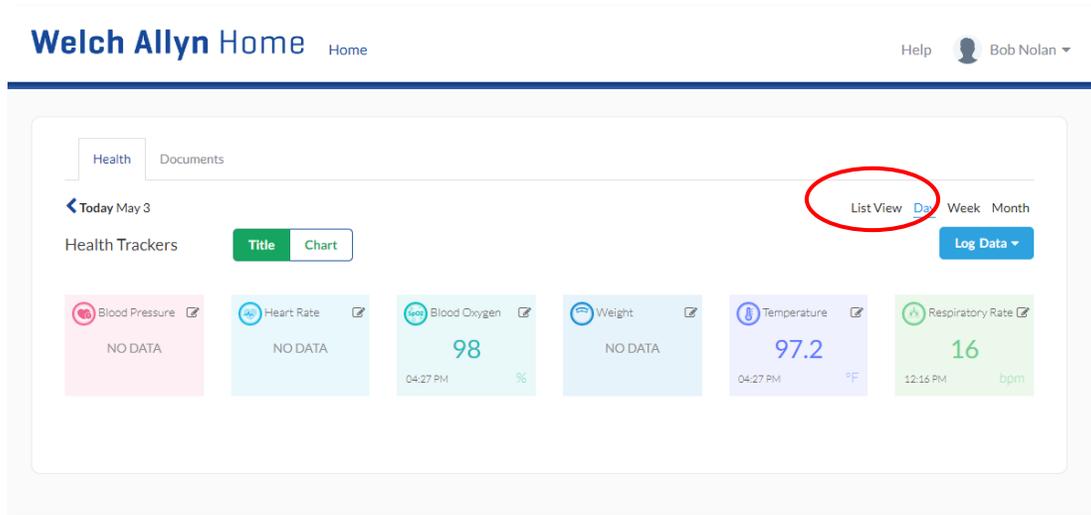


Edit / Erase the reading

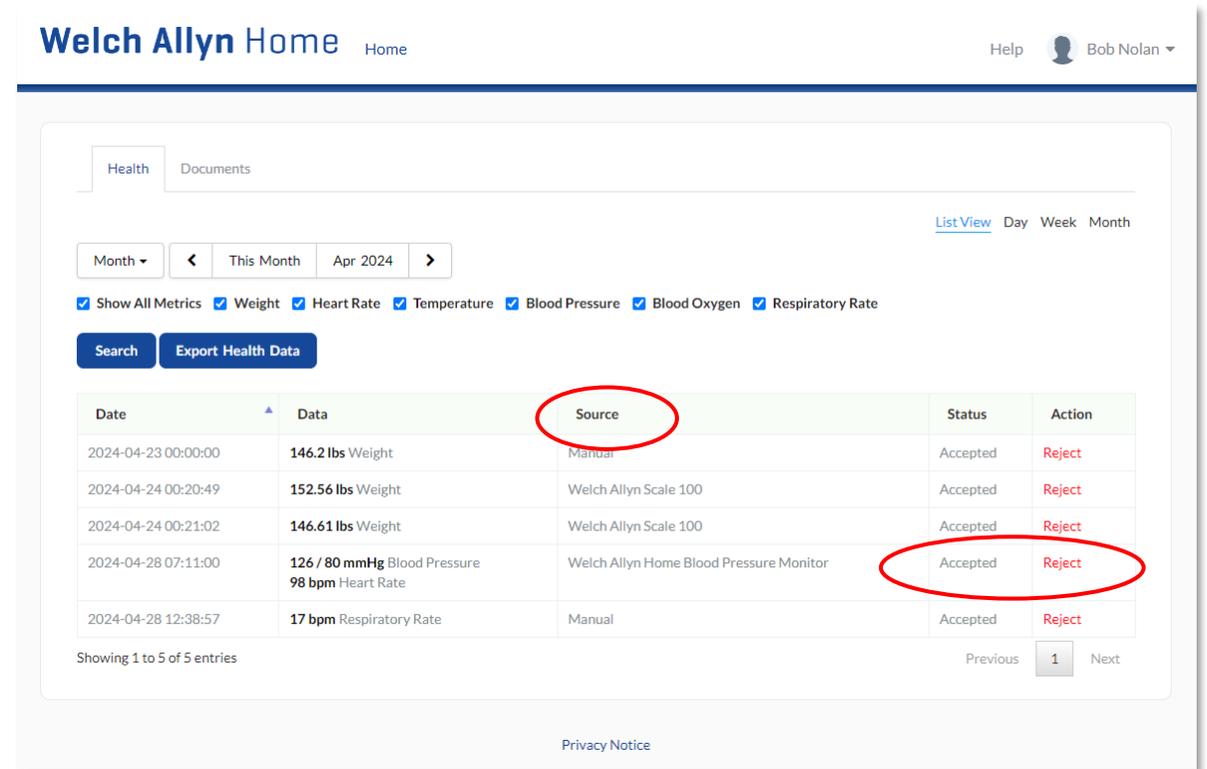
Click **Submit**

Updating Health Readings on the Portal – Accepting or Rejecting a Reading

Synced and manually logged readings can be accepted or rejected in the Patient Portal



Click **List View**

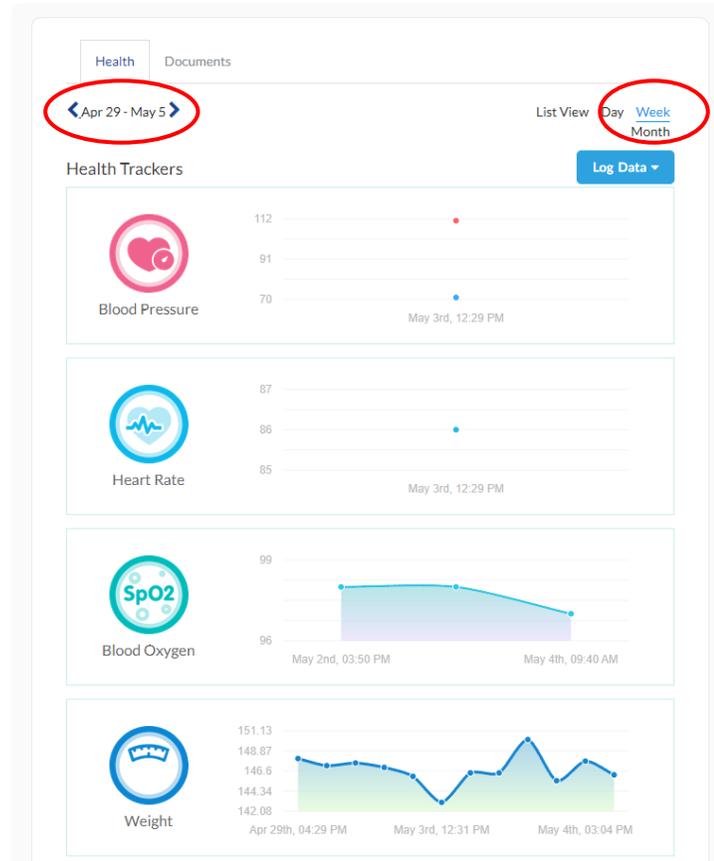


- A reading's source would display whether it was synced or manually logged.
- Click **Accept/Reject**
- A rejected reading cannot be edited, unless accepted

Changing Chart Views of Readings on the Portal

- Under the Week view and Month views, a graph of the readings will be shown for every instance of synced and manually logged readings.
- Hovering through the points will show the date, time and reading of the specific measurement type.

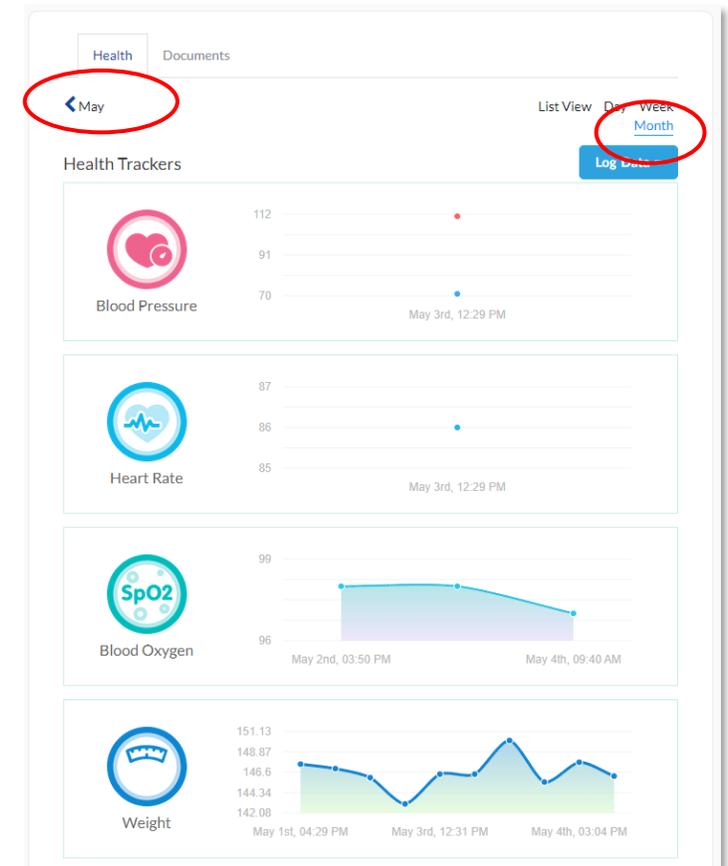
Week View



Tap **Week**

Scroll through the weeks by clicking the arrows

Month View



Tap **Month**

Scroll through the months by clicking the arrows

Exporting Health Readings

Welch Allyn Home Home Help Bob Nolan

Health Documents

Month < This Month Apr 2024 > [List View](#) Day Week Month

Show All Metrics Weight Heart Rate Temperature Blood Pressure Blood Oxygen Respiratory Rate

Search Export Health Data

Date	Data	Source	Status	Action
2024-04-23 00:00:00	146.2 lbs Weight	Manual	Accepted	Reject
2024-04-24 00:20:49	152.56 lbs Weight	Welch Allyn Scale 100	Accepted	Reject
2024-04-24 00:21:02	146.61 lbs Weight	Welch Allyn Scale 100	Accepted	Reject
2024-04-28 07:11:00	126 / 80 mmHg Blood Pressure 98 bpm Heart Rate	Welch Allyn Home Blood Pressure Monitor	Accepted	Reject
2024-04-28 12:38:57	17 bpm Respiratory Rate	Manual	Accepted	Reject

Showing 1 to 5 of 5 entries Previous 1 Next

Privacy Notice

Click **List View**

Select the coverage (month/week/day, etc.) of metrics to include in the file to be exported

Click **Export Health Data**

EXPORT HEALTH DATA

You are about to export patient health data. Do you want to continue?

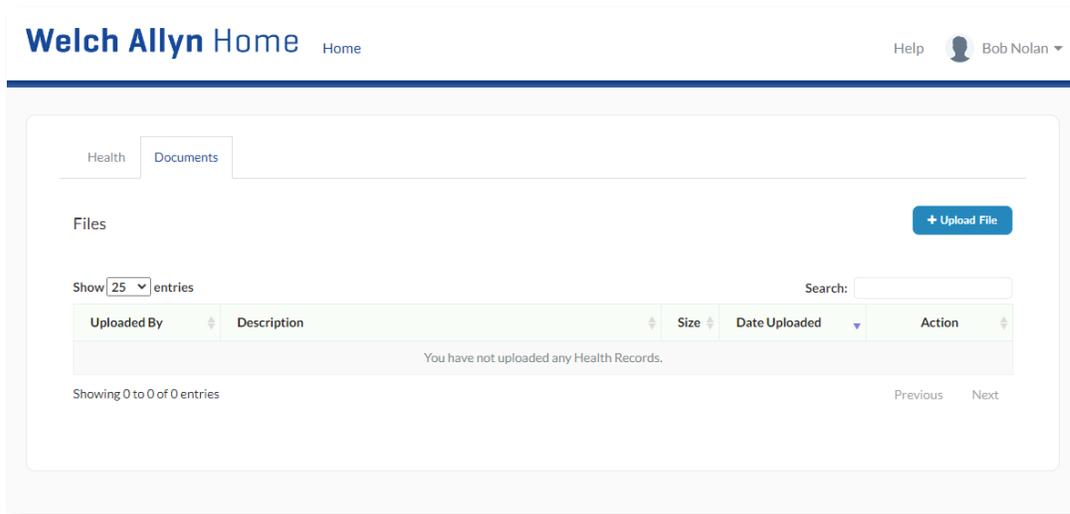
Close Export Health Data

Click **Export Health Data** to confirm

Downloading of health data will start automatically. Exported data will be in .csv format

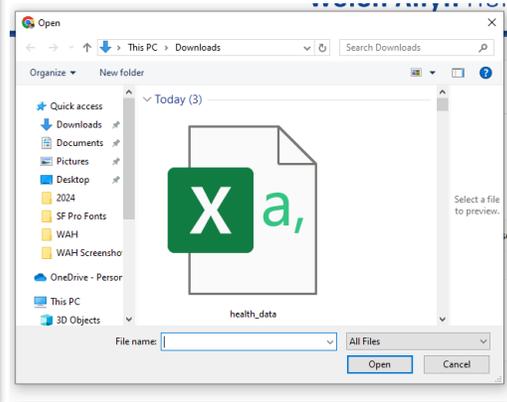
Uploading Files

- The Patient can share documents with their Providers/Clinicians (e.g., images and .pdf files)



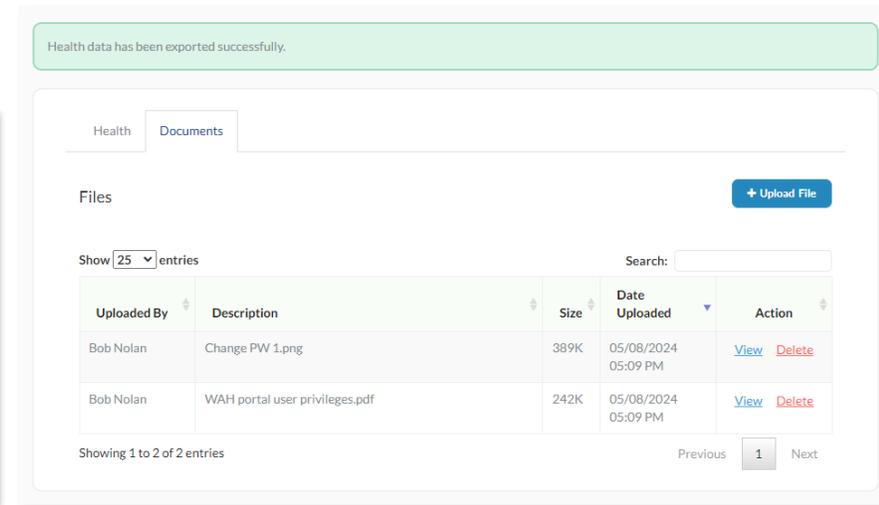
Click **Documents**

Click **+Upload File**



Select the file to share

Click **Open**



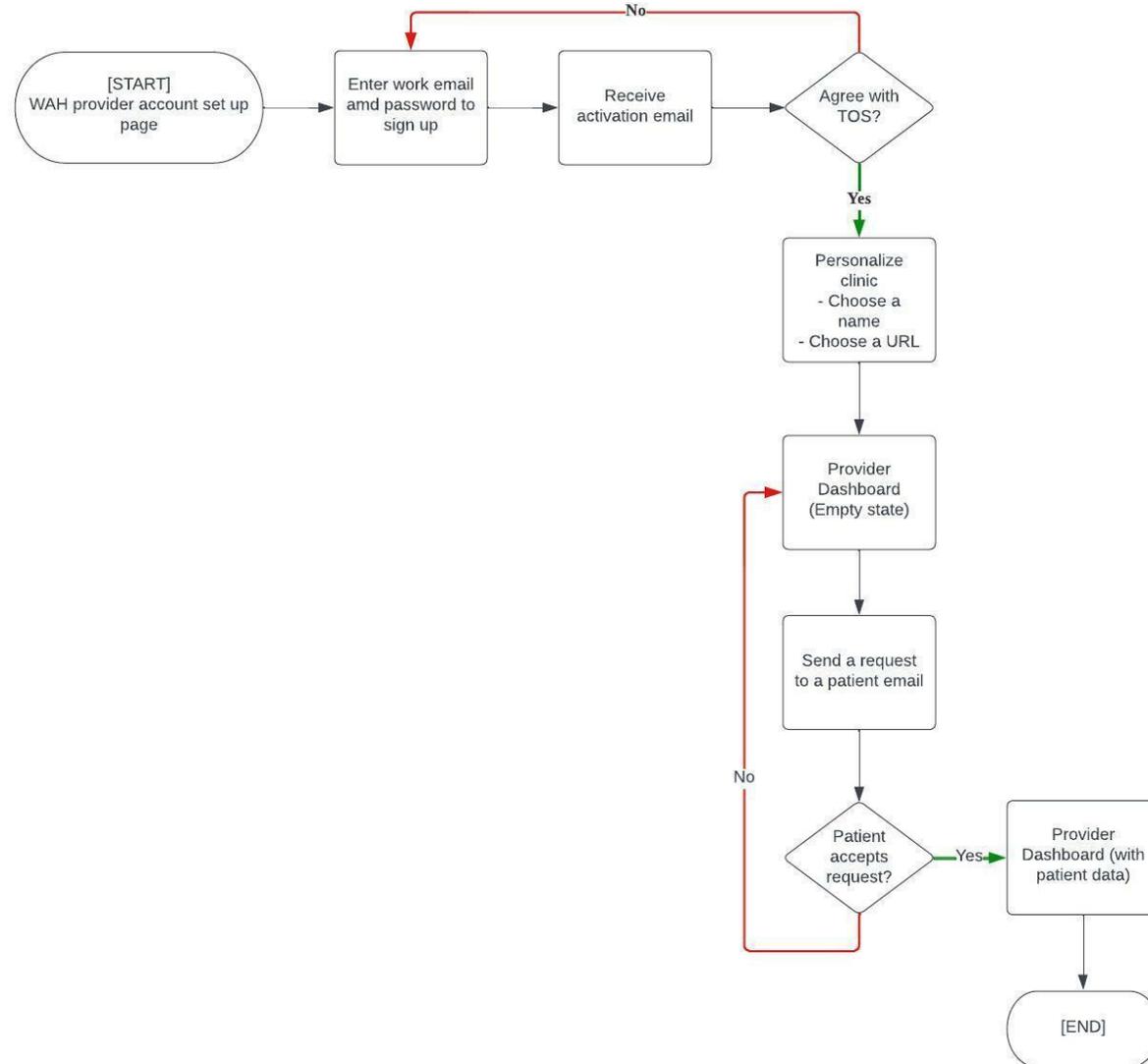
Click **Documents**

Click **+Upload File**



Clinician / Provider

Clinician/ Provider Journey



User Privileges

Functions	Clinician	Provider
Actions on Patients	X	-
Create Patient	X	X
Invite Patient	X	X
Edit Patient	X	X
Delete Patient	X	-
Suspend/Confirm Patient	X	-
Set Patient Password	X	-
Search for Patient	X	X
View List of Patients	X	X
View Patient Details	X	X
Upload Documents	X	X

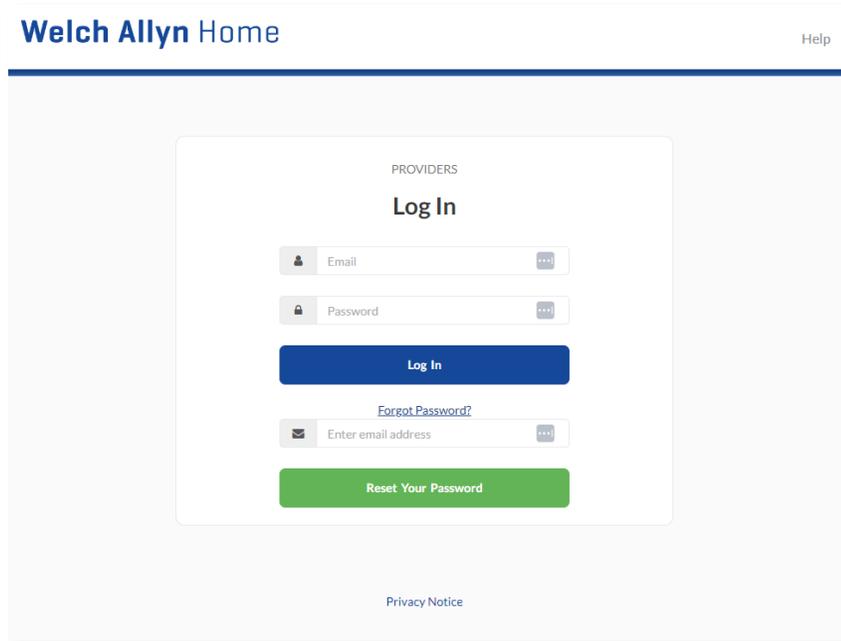
User Privileges – cont'd

Functions	Clinician	Provider
Actions on Health Data		
Manually Enter Health Data	X	X
Edit and delete health data that was added manually	X	X
Manage clinic risk range settings	-	-
Manage provider risk range settings	X	X
Manage custom patient specific risk range settings	X	X
Manage provider risk range notification settings	X	X

User Privileges – cont'

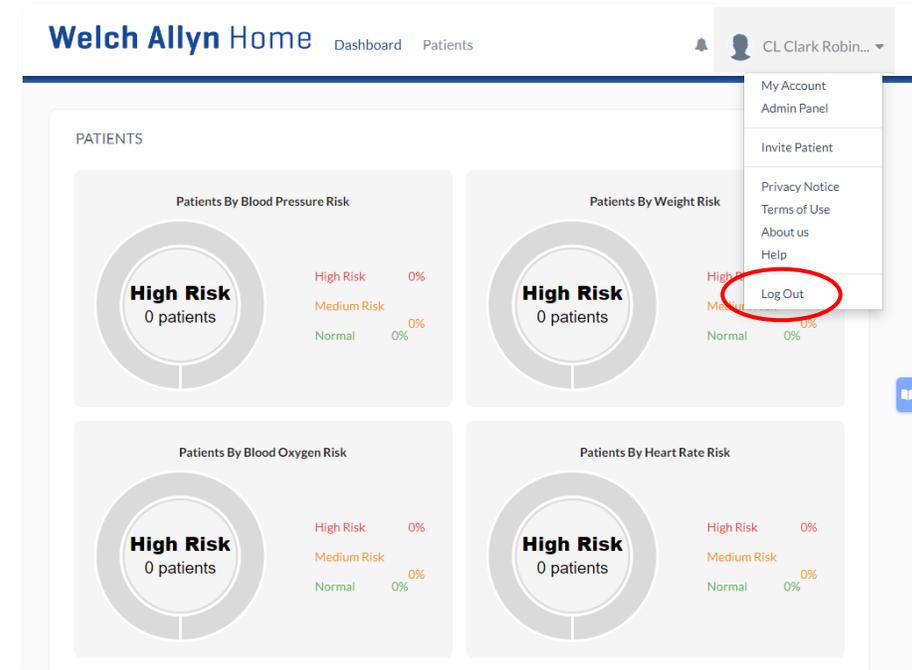
Functions	Clinician	Provider
Actions on Health Data		
Enable/disable health tile	-	-
View Health dashboard	X	X
Export health data	X	X
Export time log	X	X
Unsubscribe patient	X	X

Logging in and logging out



Log in with the email address and password used when the account was created

To Reset the Password:
Click **Forgot password**, enter the email address and click **Reset Your Password**. Follow instructions in the email.



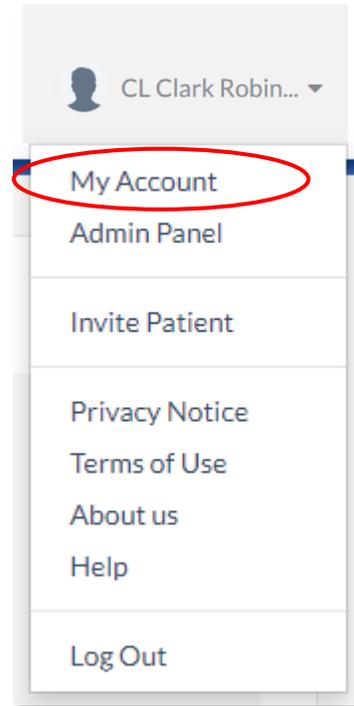
Click Profile Menu on the far right of the menu bar and click **Log out**.

The *Welch Allyn Home Log in* screen appears. Logging out was successful.

Changing Password in the Portal

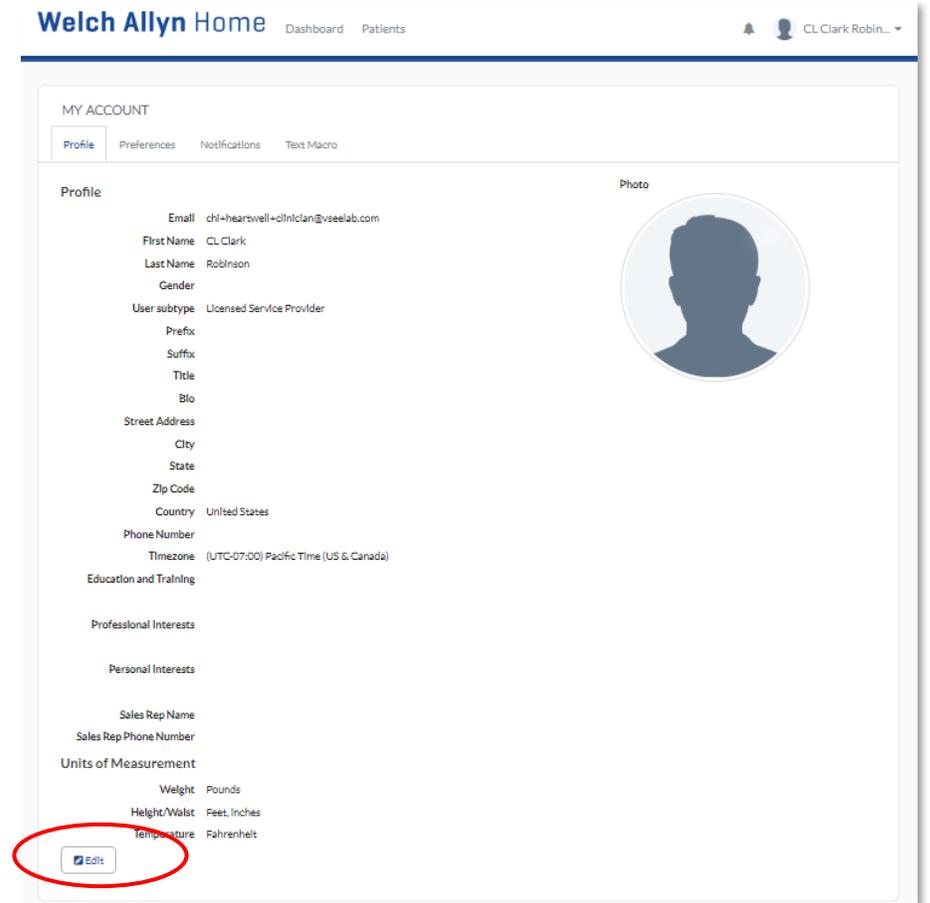
The user can also change their password once they have logged in the Clinic Portal.

Unlike Reset Password, the user will be required to enter their current password.



Click name on the right side of the menu bar.

Click **My Account**.



Under the Profile tab, click **Edit**. The password fields do not appear until Edit is clicked.

Changing Password in the Portal – Cont'd

Welch Allyn Home Dashboard Patients CL Clark Robin...

MY ACCOUNT

Profile Preferences Notifications Text Macro

Profile

Existing Password 

New Password  [Password requirements](#)

Confirm New Password 

Email chi+heartwell+clinician@vseelab.com

First Name CL Clark

Last Name Robinson

Gender Select Gender

Prefix e.g Mr, Mrs, Dr

Suffix e.g M.D., R.N., N.P.

Title e.g Family Therapist...

Bio

Photo

Drag file to upload or click to select a file (size limit:100M)

Professional Interests

Personal Interests

Sales Rep Name

Sales Rep Phone Number  (201) 555-0123

Units of Measurement

Weight Pounds

Height/Waist Feet, inches

Temperature Fahrenheit

Cancel Update

Scroll down

Click **Update** to save the changes

Changing the User Profile

Profile information can be updated.

Follow the same initial steps on changing the password in the portal:

1. Click name on the right side of the menu
2. Click **My Account**
3. Under the Profile tab, click **Edit**

Note: There's no need to enter the password when updating the user profile

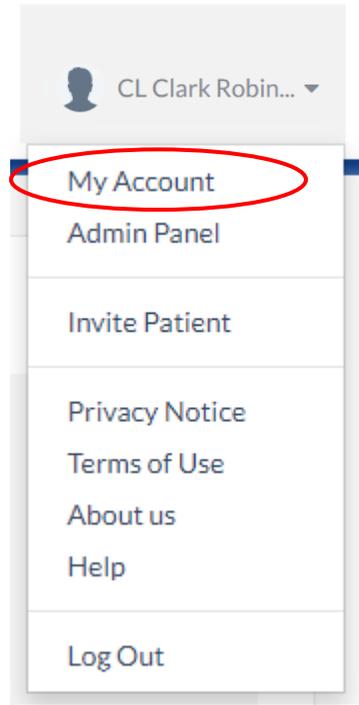


Update the profile information using the editable fields

Click **Update** to save the changes

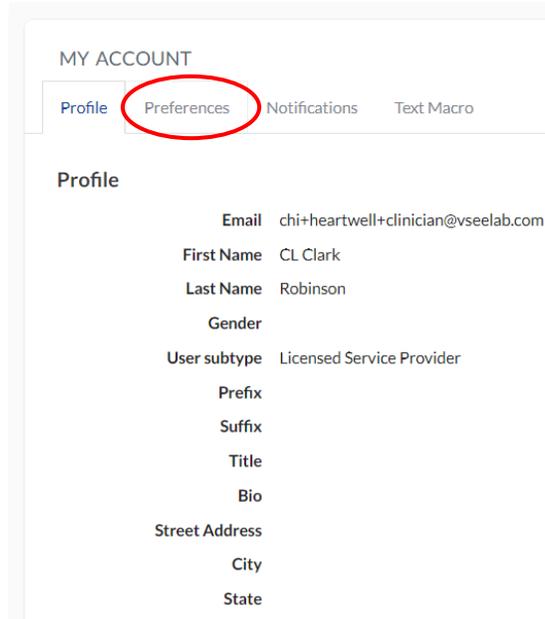
Revoking Consent to Participate in Surveys

A user who has given consent to participate to surveys during the sign-up process can opt out (or back in).

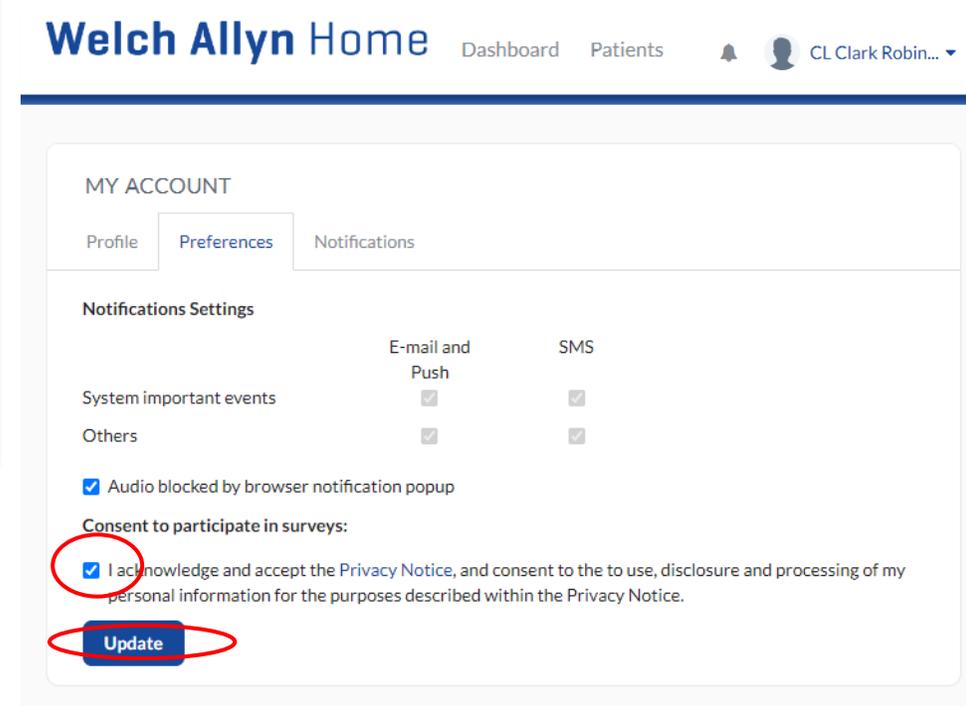


Click name on the right side of the menu bar.

Click **My Account**.



Click **Preferences**



Under Consent to participate in surveys, click on the checkbox to uncheck and revoke your consent to participate in the surveys.

Accessing the Admin Panel

Clinicians can view both the Provider and Admin views. To access the Admin Panel, the Clinician would have to change views.

Note:

- To go back to the Provider view, click **Provider Dashboard** under the name on the right side of the menu bar
- A shortcut to switch to the Provider view is to click the Welch Allyn Home logo on the upper left side of the menu bar
- The last view (whether Provider Dashboard or Admin Panel) will be the same view when logged back in.
- **A Provider does not have access to the Admin Panel.**

The screenshot shows the Welch Allyn Home dashboard. At the top right, there is a user profile for 'CL Clark Robin...' with a dropdown menu. The 'Admin Panel' option is circled in red. Below the menu, the dashboard displays four risk assessment charts for patients:

Chart Title	Overall Risk	High Risk	Medium Risk	Normal
Patients By Blood Pressure Risk	High Risk (1 patient)	50%	50%	0%
Patients By Weight Risk	Medium Risk (2 patients)	0%	100%	0%
Patients By Blood Oxygen Risk	Normal (1 patient)	0%	0%	100%
Patients By Heart Rate Risk	Medium Risk (1 patient)	0%	50%	50%

Click name on the right side of the menu bar.

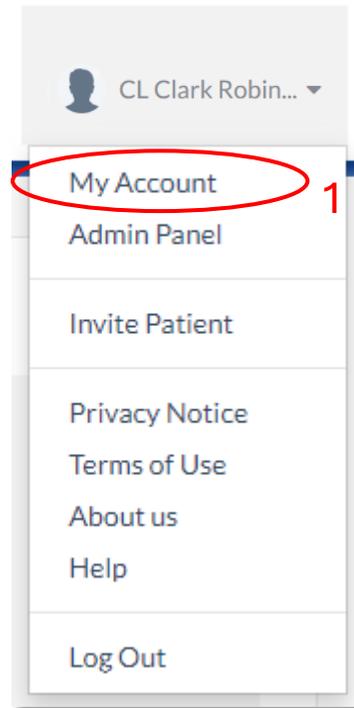
Click **Admin Panel**.

Creating Users - Patients

Ideally, the Patients would be the ones to create/sign up for an account on their own through the Welch Allyn Home app. However, Admins and Clinicians can help in creating a Patient account.

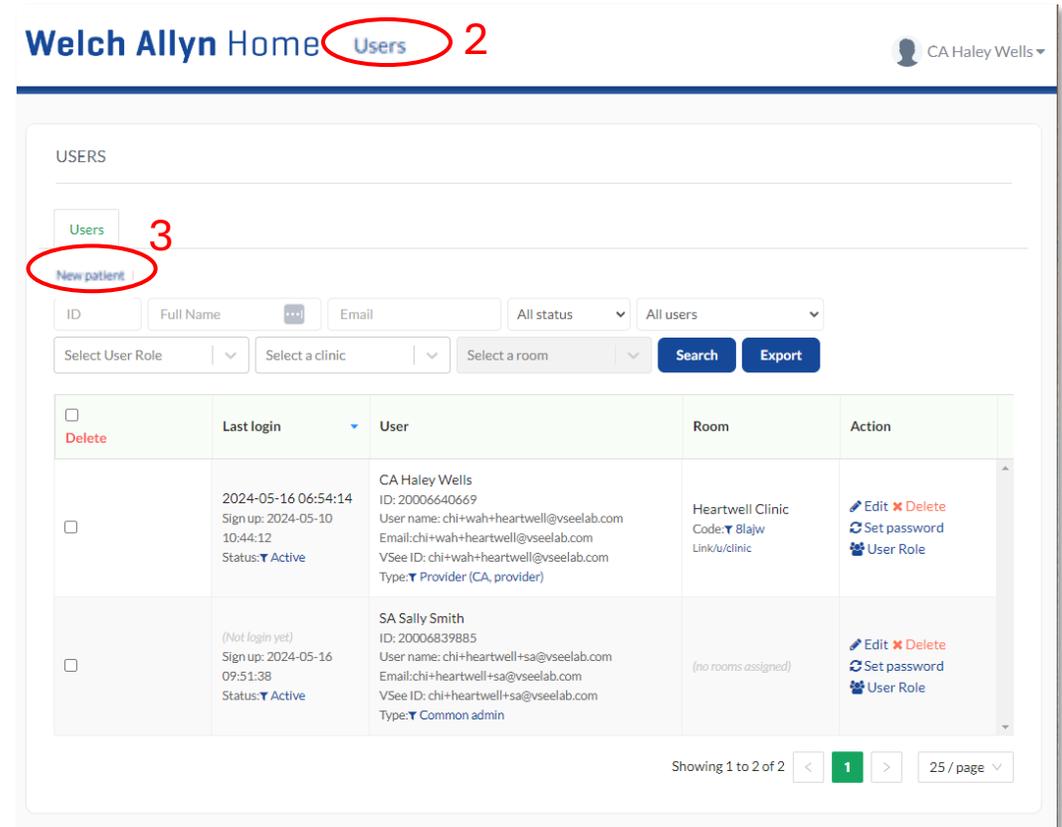
Patients would be able to access their health records through the Welch Allyn Home app and the Patient Portal.

Existing Patients from the old app need not be created manually as they will be migrated to the new Welch Allyn Home Clinic.



Click name on the right side of the menu bar.

Click **Admin Panel**.



On the menu bar, click **Users**. Click **New patient**.

Creating Users – Patients (Cont'd)

Complete the Clinic, Rooms, Username (use their Email address), First Name, Last Name, Email, and any other optional information.

Then click on **Create**.

A message saying that the patient's account was created appears with the PATIENT DETAIL screen.

Enter any other optional information and click on **Save**.

Delete	Last login	User	Room	Action
<input type="checkbox"/>	2024-05-16 12:52:10 Sign up: 2024-05-10 10:44:12 Status: ▼ Active	CA Haley Wells ID: 20006640669 User name: chi+wah+heartwell@vseelab.com Email: chi+wah+heartwell@vseelab.com VSee ID: chi+wah+heartwell@vseelab.com Type: ▼ Provider (CA, provider)	Heartwell Clinic Code: ▼ Blajw Link: u/clinic	Edit Delete Set password User Role
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 09:51:38 Status: ▼ Active	SA Sally Smith ID: 20006839885 User name: chi+heartwell+sa@vseelab.com Email: chi+heartwell+sa@vseelab.com VSee ID: chi+heartwell+sa@vseelab.com Type: ▼ Common admin (system_admin_wah)	(no rooms assigned)	Edit Delete Set password User Role
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 11:13:07 Status: ▼ Active	Michelle Parker ID: 20006844929 User name: chi.achacoso+heartwell+patient@gmail.com Email: chi.achacoso+heartwell+patient@gmail.com VSee ID: cmo+user20006844929 Type: ▼ Patient	Heartwell Clinic Code: ▼ Blajw Link: u/clinic	Edit Delete Set password
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 11:37:03 Status: ▼ Active	Adam Barney ID: 20006845866 User name: chi+heartwell+patient2@vseelab.com Email: chi+heartwell+patient2@vseelab.com VSee ID: cmo+user20006845866 Type: ▼ Patient	Heartwell Clinic Code: ▼ Blajw Link: u/clinic	Edit Delete Set password
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 12:53:32 Status: ▼ Active	Cris Green ID: 20006849353 User name: chi+heartwell+patient3@vseelab.com Email: chi+heartwell+patient3@vseelab.com VSee ID: cmo+user20006849353 Type: ▼ Patient	Heartwell Clinic Code: ▼ Blajw Link: u/clinic	Edit Delete Set password

The information is saved and the overall list of users displays.

Find the new user in the list and click **Set password** in the Action column.



Creating Users – Patients (Cont'd)

Enter a temporary password in the New password field,

Check the box next to Show password (so you can visually confirm and note what the password is)

Click **Update Password**.

A success message appears. Click **Cancel** to go back to the list of users

Share the new patient user information and temporary password with the clinician/ provider who will invite the new patient to join.

ID	Full Name	Email	All status	All users	Select User Role
<input type="checkbox"/>	Adam Barney	chi+heartwell+patient2@vseelab.com	Active	All users	Patient

The user type will show as "Patient" in the list of users table

Creating Users – Patients (Cont'd)

The Administrator, system users, and clinician can also push the reset password email to a patient.

The screenshot shows the 'USERS' management interface. At the top, there are search filters for ID, Full Name, Email, All status, All users, and Select User Role. Below these are filters for 'Select a clinic' and 'Select a room', along with 'Search' and 'Export' buttons. The main table has the following data:

<input type="checkbox"/>	Last login	User	Room	Action
<input type="checkbox"/>	(Not login yet) Sign up: 2024-05-16 11:37:03 Status: Active	Adam Barney ID: 20006845866 User name: chi+heartwell+patient2@vseelab.com Email: chi+heartwell+patient2@vseelab.com VSee ID: cmo+user20006845866 Type: Patient	Heartwell Clinic Code: Blajw Link/u/clinic	Edit Delete Reset password

Click **Edit** on the Action column of the Patient to whom the reset password email will be sent

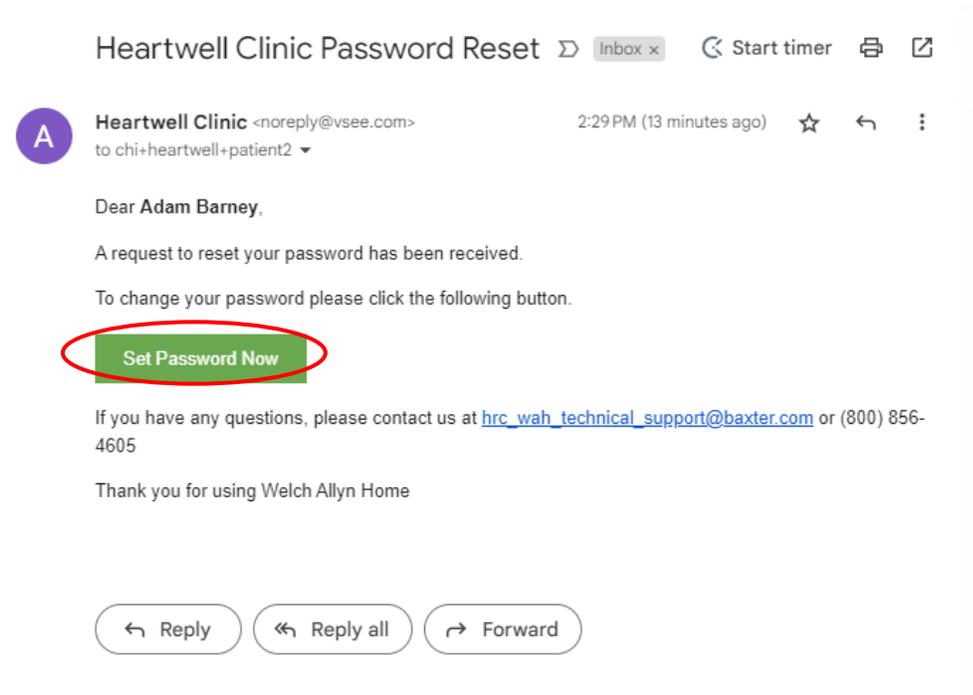
The screenshot shows the 'PATIENT DETAIL: ADAM BARNEY' interface. At the top, there are tabs for 'Profile', 'Rooms Management', and 'Other' (circled in red). Below the tabs is the 'Login detail' section with the following information:

Username	chi+heartwell+patient2@vseelab.com	Send Reset Password Email
Password	xxxxxxxxxxxx	
Email	chi+heartwell+patient2@vseelab.com	Disable And Remove Log In Detail
Status	Confirmed <input checked="" type="checkbox"/> Edit	
User type	Patient <input checked="" type="checkbox"/> Edit	

Under Patient Detail, click the **Other** tab

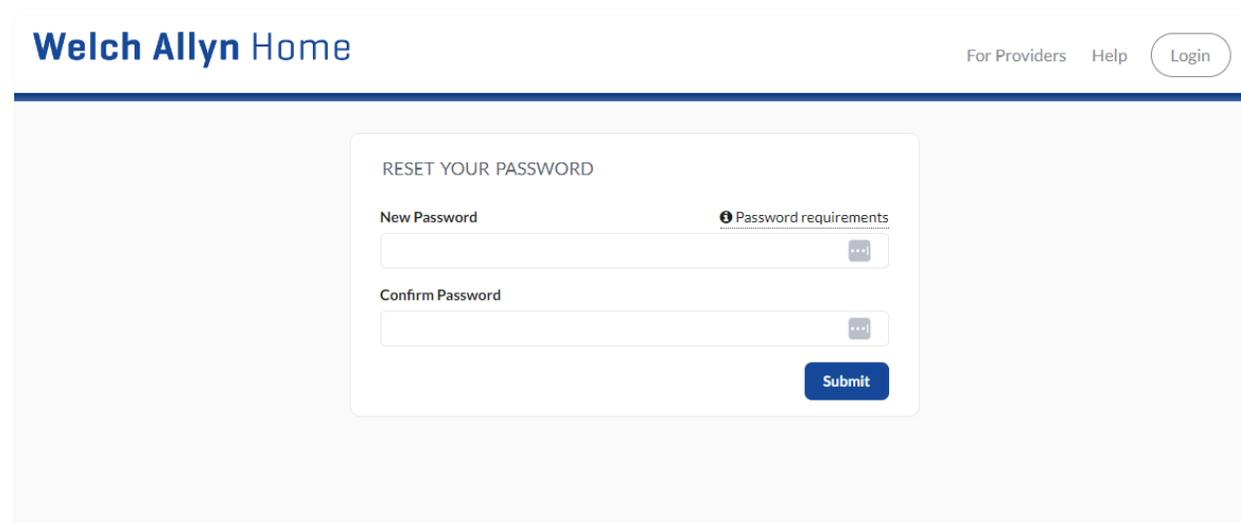
Click **Send Reset Password Email**

Creating Users – Patients (Cont'd)



Open the Password Reset email. Check Spam if the email is not seen in the Inbox

Click Set **Password Now**



Enter the new password and re-enter the password to confirm

Click **Submit**

Setting a Password for Patients

As a Clinician, a password may be set for Patients. This is especially helpful for Patients who have no access to their emails anymore. They would be able to log in and change their password without the need to access their email.

Note: Password on the Portal will be the same on the Welch Allyn Home app (for Patients)

The screenshot shows the 'Welch Allyn Home Users' interface. A dropdown menu is open for the user 'CL Clark Robin...'. The menu items are: My Account, Admin Panel, Invite Patient, Privacy Notice, Terms of Use, About us, Help, and Log Out. The 'Admin Panel' option is circled in red and labeled '2'. The user list table below has columns: Delete, Last login, User, Room, and Action. The 'Action' column for the user 'Betty Rivers' has a 'Set password' link circled in red and labeled '3'. The user 'Stella Evans' is also listed with a 'Set password' link.

Delete	Last login	User	Room	Action
<input type="checkbox"/>	2024-05-22 03:30:12 Sign up: 2024-05-22 03:21:44 Status: Active	Stella Evans ID: 20006973160 User name: ileen.test+stellaevans@gmail.com Email: ileen.test+stellaevans@gmail.com VSee ID: cmo+user20006973160 Type: Patient	Heartwell Clinic Code: Blajw Link: /u/clinic	Edit Delete Set password
<input type="checkbox"/>	2024-05-22 03:28:42 Sign up: 2024-05-16 11:59:15 Status: Active	John Addams ID: 20006846893 User name: ileen.test+johnaddams@gmail.com Email: ileen.test+johnaddams@gmail.com VSee ID: cmo+user20006846893 Type: Patient	Heartwell Clinic Code: Blajw Link: /u/clinic	Edit Delete Set password
<input type="checkbox"/>	2024-05-20 21:21:19 Sign up: 2024-04-18 15:50:58 Status: Active	Betty Rivers ID: 20006143206 User name: chi.achacoso+los@gmail.com Email: chi.achacoso+los@gmail.com VSee ID: cmo+user20006143206 Type: Patient	Heartwell Clinic Code: Blajw Link: /u/clinic	Edit Delete Set password

1 - Click name on the right side of the menu bar.

2 - Click **Admin Panel**.

3 - Click **Set password**

The 'SET PASSWORD' dialog box contains the following elements:

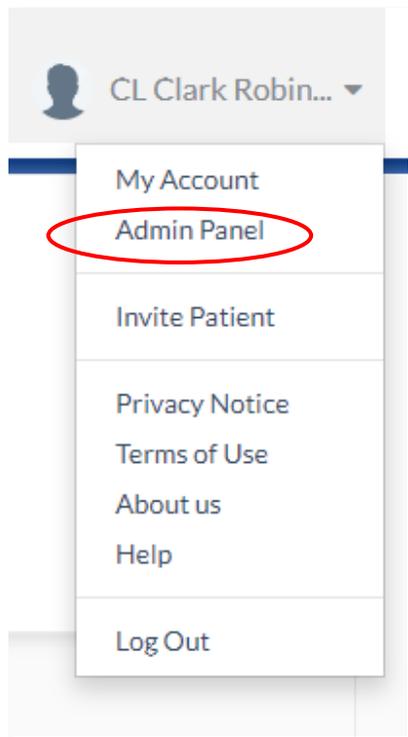
- User name:** chi+heartwell+sa@vseelab.com
- New password:** Password (with a toggle to show/hide)
- Show password
- Update Password** button
- Cancel** button

Set a password that meets the requirements

Click **Update Password**

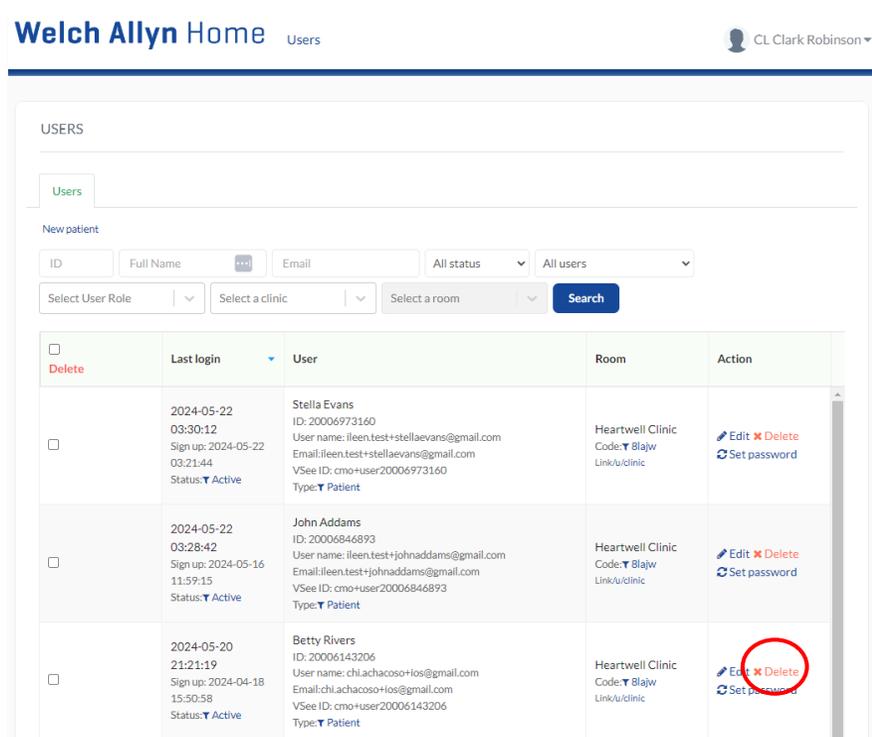
Share the log in information to the user.

Deleting a Patient



Click name on the right side of the menu bar.

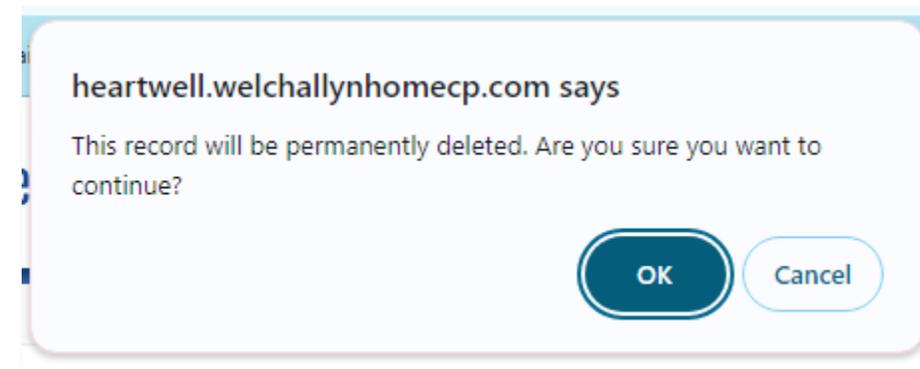
Click **Admin Panel**.



On the menu bar, click **Users**.

You can scroll through the list or search using the Full name or Email address to locate the user to update.

Click **Delete** in the Action column



Click on **OK** to confirm deletion of the account..

Dashboard

The Dashboard displays vital signs charts of patients' risk levels and a table with patients' real time readings.

Note: Click on the Dashboard link or refresh the page to display updated information.



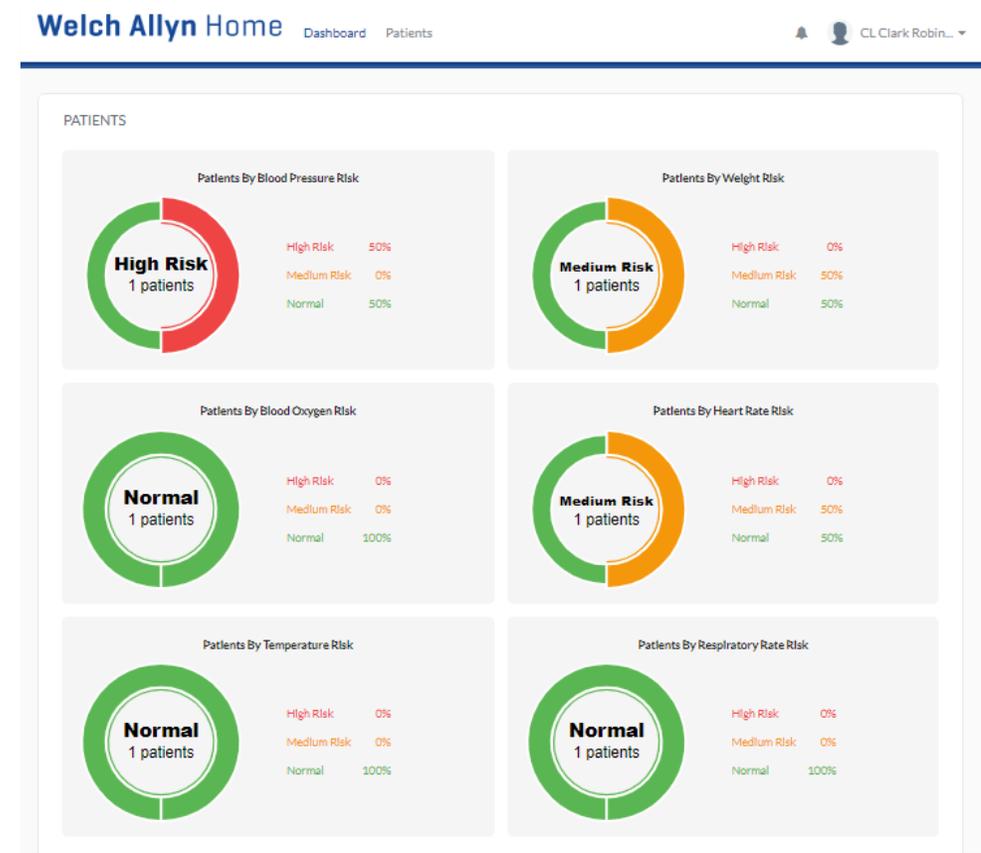
Risk Level Charts

The Risk level charts display summarized risk levels of the patients' latest readings.

The risk levels are determined based on how the clinician and/or administrator sets the risk ranges.

Click on a risk level color in a particular vitals chart to filter the table of patients on the Readings table for only those classified on that risk level for that vital sign.

Click on Dashboard or refresh the page to display all patient information.



Readings Table

The screenshot shows a table with the following columns: Patient Name, Weight, Heart Rate, Blood Pressure, Blood Oxygen, Temperature, Respiratory Rate, and Actions. There are two rows of patient data.

Patient Name	Weight	Heart Rate	Blood Pressure	Blood Oxygen	Temperature	Respiratory Rate	Actions
Betty Rivers Age 45, Female	142.64 lbs 21 hours ago 02:32 AM	89 bpm 21 hours ago 02:32 AM	115/78 mmHg 21 hours ago 02:32 AM				⋮ □
John Addams Age 42, Male	152 lbs 4 days seconds ago 12:00 AM	100 bpm 4 minutes ago 12:00 AM	120/129 mmHg 4 minutes ago 11:59 PM	95 % 2 minutes ago 11:59 PM	99 °F 4 days seconds ago 12:00 AM	20 bpm 4 minutes ago 12:00 AM	⋮ □

Showing 1 to 2 of 2 entries

Previous 1 Next

Note: If a patient has performed BP readings in the last 30 days, then the patient will be listed as Active in the Portal.

The Readings table displays the latest readings for patients in the selected risk level in the Risk level charts, or all patients if no particular vital's risk level is selected.

The following information and controls appear in this area for each patient:

- Patient Name
- Weight
- Heart Rate
- Blood Pressure
- Blood Oxygen
- Temperature
- Respiratory Rate
- Actions click on the 3 vertical dots to: Edit risk range, Edit notifications, Pin/Unpin a Patient

To review a specific patient, click their name on the table.

Patients

The Patient screen displays patient demographics.

To filter the data to be viewed, click any of the following radio buttons:

- All - shows all patients, including hidden patients
- Only my patients - shows the Clinician/Provider’s own patients, excluding the hidden patients
- Hidden patients - shows all of the patients that have been hidden
- Pending requests - shows patients who have not accepted the subscription request

Note: To find a particular patient, enter their name or email address in the Search window and press enter. A list of all patents who match the entry appears

Welch Allyn Home Dashboard **Patients** CL Clark Robin...

Patients Patient Health

Show: All Only my patients Hidden patients Pending requests [Invite Patient](#)

Show 25 entries Search: 3 or more characters 0 selected

ID	Name	Gender	Age	Email	Phone Number	Rooms	Action
20006844929	Michelle Parker	Unknown		chi.achacoso+heartwell+patient@gmail.com		Heartwell Clinic	⋮
20006143206	Betty Rivers	Female	45 years	chi.achacoso+ios@gmail.com	+1 206-318-7100	Heartwell Clinic	⋮
20006845866	Adam Barney	Unknown		chi+heartwell+patient2@vseelab.com		Heartwell Clinic	⋮
20006846893	John Addams	Male	42 years	ileen.test+johnaddams@gmail.com	123456789	Heartwell Clinic	⋮
20006849353	Cris Green	0		chi+heartwell+patient3@vseelab.com		Heartwell Clinic	⋮

Showing 1 to 5 of 5 entries Previous 1 Next

Click on the **Patients** link at the top of the page to view patient information.



Patients – Cont'd

The table contains the following details:

- ID (this is a system ID)
- Name
- Gender
- Age
- Email
- Phone number
- Rooms
- Date of Last Visit
- Action (does not show under All view)
hide/unhide, unsubscribe, or cancel a pending subscription request
- Checkbox (does not show under All view) - to select multiple patients to pin/unpin their health vitals to the Dashboard
- Bookmark icon used to pin/unpin the selected patients.

Note: A confirmation dialog will appear when unpinning patients.

To review a specific patient, click their name on the table.

Welch Allyn Home Dashboard Patients

CL Clark Robin...

Patients Patient Health

Show: All Only my patients Hidden patients Pending requests

Show 25 entries Search: 3 or more characters

Invite Patient 0 selected

ID	Name	Gender	Age	Email	Phone Number	Rooms	Action
20006844929	Michelle Parker	Unknown		chi.achacoso+heartwell+patient@gmail.com		Heartwell Clinic	⋮
20006143206	Betty Rivers	Female	45 years	chi.achacoso+ios@gmail.com	+1 206-318-7100	Heartwell Clinic	⋮
20006845866	Adam Barney	Unknown		chi+heartwell+patient2@vseelab.com		Heartwell Clinic	⋮
20006846893	John Addams	Male	42 years	ileen.test+johnaddams@gmail.com	123456789	Heartwell Clinic	⋮
20006849353	Cris Green	0		chi+heartwell+patient3@vseelab.com		Heartwell Clinic	⋮

Showing 1 to 5 of 5 entries

Previous 1 Next

Patient Health Tab

This screen displays patients' individual vitals readings.

To filter the data that you want to view, select the following from the dropdown menus:

- date range
- patient email/user ID for particular patient or leave blank for all
- source
- metrics of vitals using the checkboxes

Then click on **Search**.

The search results returned are displayed in a table of readings containing:

- Date
- Patient
- Data
- Source
- Status

The screenshot shows the 'Welch Allyn Home' interface with the 'Patients' tab selected. The 'Patient Health' sub-tab is highlighted with a red circle. Below the navigation, there are filters for 'Month' (set to 'This Month'), 'Patient Email', and 'All Source'. A row of checkboxes is visible, all of which are checked: Show All Metrics, Weight, Heart Rate, Temperature, Blood Pressure, Blood Oxygen, and Respiratory Rate. There are 'Search' and 'Export Health Data' buttons. The main area contains a table with the following data:

Date	Patient	Data	Source	Status
2024-05-22 15:00:46	John Addams ileen.test+johnaddams@gmail.com	152 lbs Weight	Manual	Accepted
2024-05-22 15:00:34	John Addams ileen.test+johnaddams@gmail.com	99 °F Temperature	Manual	Accepted
2024-05-22 15:00:21	John Addams ileen.test+johnaddams@gmail.com	20 bpm Respiratory Rate	Manual	Accepted
2024-05-22 15:00:10	John Addams ileen.test+johnaddams@gmail.com	100 bpm Heart Rate	Manual	Accepted
2024-05-22 14:59:57	John Addams ileen.test+johnaddams@gmail.com	120 / 129 mmHg Blood Pressure	Manual	Accepted
2024-05-22 14:59:41	John Addams ileen.test+johnaddams@gmail.com	95 % Blood Oxygen	Manual	Accepted
2024-05-21 17:32:48	Betty Rivers chlachacoso+ios@gmail.com	142.64 lbs Weight	Welch Allyn Scale 100	Accepted
2024-05-21 17:32:00	Betty Rivers chlachacoso+ios@gmail.com	115 / 78 mmHg Blood Pressure 89 bpm Heart Rate	Welch Allyn Home Blood Pressure Monitor	Accepted
2024-05-21 17:31:19	Betty Rivers chlachacoso+ios@gmail.com	142.86 lbs Weight	Welch Allyn Scale 100	Accepted

To export and download a spreadsheet of the displayed data, click on **Export Health Data**.

Invite Patient

Welch Allyn Home clinicians can invite (add) patients to their room in the clinical portal after the patient's user account is created.

Patient accounts can be created by the patients themselves in the Welch Allyn Home app or by an admin user of the clinical portal.

For patient accounts created by an admin user, obtain the temporary password from the admin user and provide it to the patient.

Note: Patients must accept an invitation to view their data before any of their app readings are transmitted to the portal

SEND REQUESTS TO PATIENTS TO CONNECT WITH YOU

Enter patients' emails below to invite

Enter emails here separated by ; 📧

Email Subject [Edit](#)

A doctor at Welch Allyn Home is inviting you to subscribe to their clinic

Email Body [Edit](#)

Add your custom message here...

Dear [user email],

You are invited to **Heartwell Clinic**. Once you accept this request, the provider will be able to follow your health data. Please review this request by clicking the button below:

Review Request

If you have any questions, please contact us at hrc_wah_technical_support@baxter.com or (800) 856-4605

Thank you for using Welch Allyn Home

Send me a test email
Send Invitation

Invite Patient – Cont'd

Welch Allyn Home Dashboard **Patients** CL Clark Robin...

Patients Patient Health

Show: All Only my patients Hidden patients Pending requests

Show 25 entries Search: 3 or more characters 0 selected

ID	Name	Gender	Age	Email	Phone Number	Rooms	Action
20006844929	Michelle Parker	Unknown		chi.achacoso+heartwell+patient@gmail.com		Heartwell Clinic	⋮
20006143206	Betty Rivers	Female	45 years	chi.achacoso+ios@gmail.com	+1 206-318-7100	Heartwell Clinic	⋮
20006845866	Adam Barney	Unknown		chi.heartwellpatient2@vncelab.com		Heartwell Clinic	⋮

SEND REQUESTS TO PATIENTS TO CONNECT WITH YOU

Enter patients' emails below to invite

Enter emails here separated by ;

Email Subject Edit

A doctor at Welch Allyn Home is inviting you to subscribe to their clinic

Email Body Edit

Add your custom message here...

Dear [user email],

You are invited to **Heartwell Clinic**. Once you accept this request, the provider will be able to follow your health data. Please review this request by clicking the button below:

Review Request

If you have any questions, please contact us at hrc_wah_technical_support@baxter.com or (800) 856-4605

Thank you for using Welch Allyn Home

Click **Patients**.

Select **Invite Patient**.

Note: Alternative navigation is to go to your profile dropdown > Invite patient.

Enter the patient's email address that was used to set up their account and a custom message to the patient.

Note: It is optional to update the email subject and body before sending the invite to the patient.

Click **Send Invitation**.

A message displays indicating whether the email was sent or not.

Note: The following will prevent the email from being sent:

- The patient has not created an account yet.
- The patient has already subscribed to the clinic.
- The patient has not accepted a pending invite.

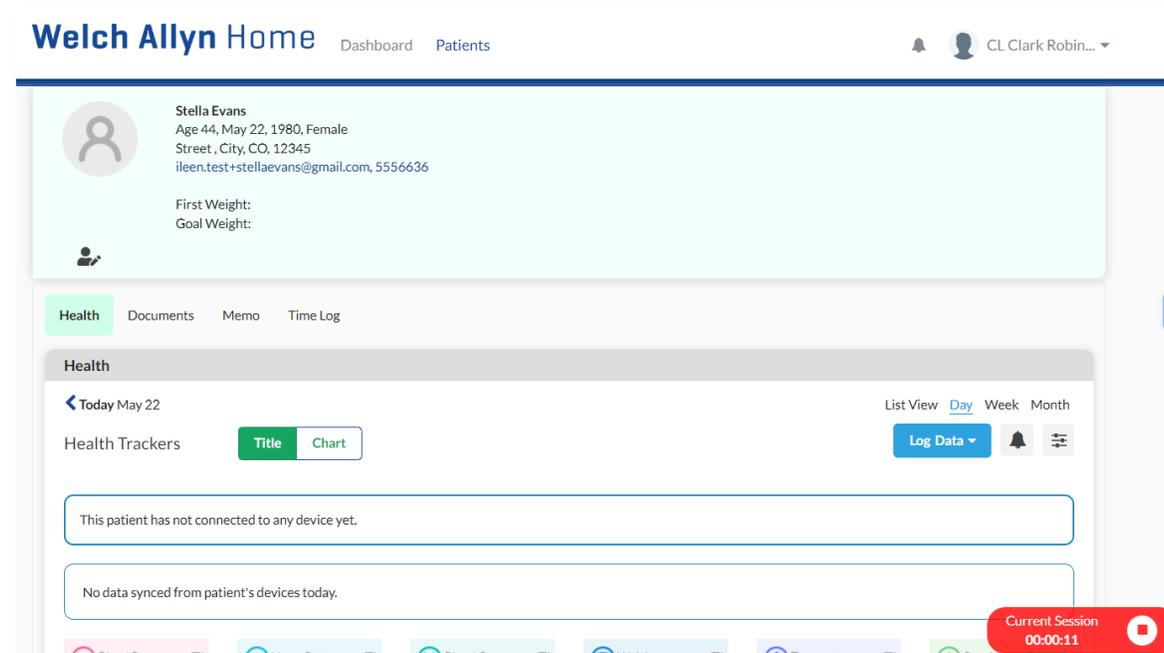
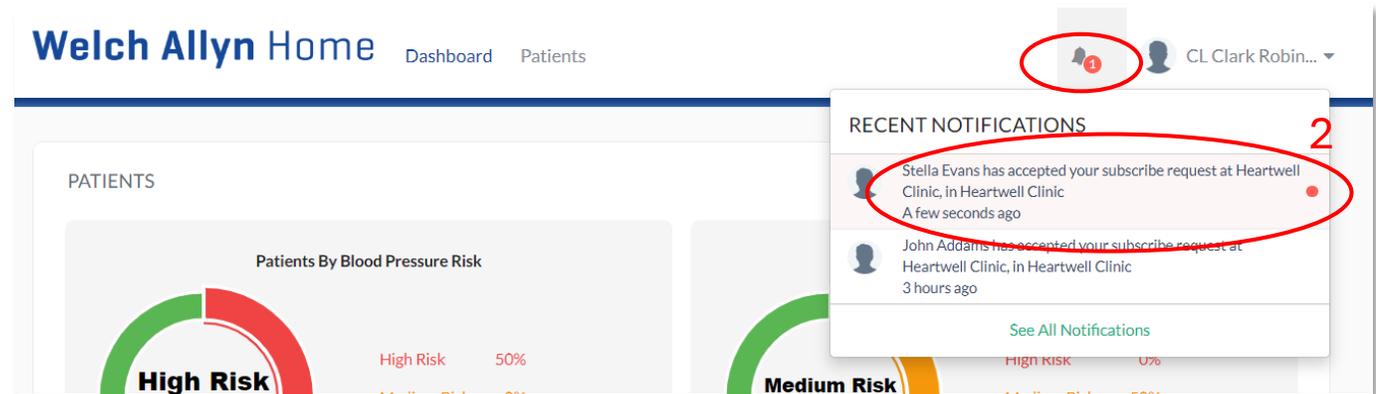
The patient must open the invitation email on their mobile device and follow the instructions in the email.



Invite Patient – Cont'd

Once a patient accepts a Clinician's / Provider's invite request, a notification about it will appear on the **bell**.

Click on the **new notification** to view the patient's profile.



Health/vitals Readings

When a Clinician / Provider selects a patient from the Dashboard or from the Patients link, the patient’s profile will appear.

The default view of the patient's Health tab is on the Day timeframe. It displays the most recent vital signs on tiles under Health Trackers, with the Title toggle button highlighted.

The screenshot displays the Welch Allyn Home interface for a patient named Betty Rivers. The patient's profile information is shown at the top, including age, gender, address, and contact details. Below this, the 'Health' tab is selected, and the 'Day' timeframe is chosen. The 'Health Trackers' section features a toggle between 'Title' and 'Chart' views, with 'Title' currently selected and highlighted. The trackers display the following data:

Tracker	Value	Unit	Time
Blood Pressure	115 / 78	mmHg	02:32 AM
Heart Rate	89	bpm	02:32 AM
Blood Oxygen	NO DATA		
Weight	142.64	1.9 to go	02:32 AM
Temperature	NO DATA		
Respiratory Rate	NO DATA		

A 'Current Session' timer at the bottom right indicates a duration of 00:00:12.

Toggle from **Title** to **Chart** which will display a graph for multiple readings on the day.

To change the timeframe of the readings displayed, select one of the following:

- **Day** (default)
- **Week**
- **Month**

Readings for the selected time period are displayed in chart layout.

Note: Refresh the page to return to the initial default Title view.

Health/vitals Readings – cont'd

To view the readings separately as a list, click on **List View** and then select one of the following:

- Weight (default)
- Blood pressure
- Blood oxygen
- Pulse
- Temperature

Note: A clinician / provider can also reject the readings as necessary from the List View.

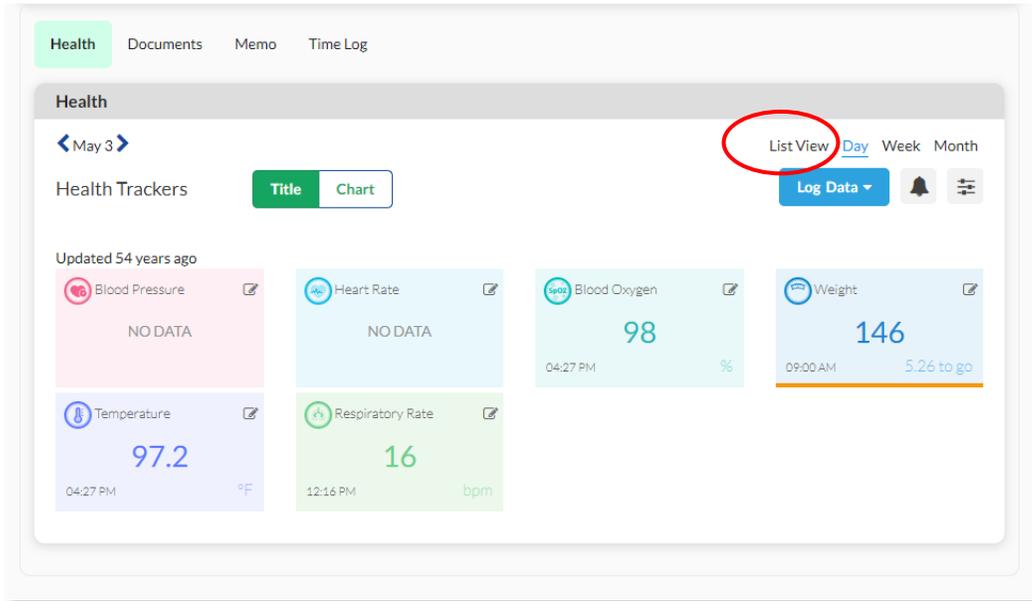
The screenshot shows a user interface for viewing health readings. At the top, there are tabs for 'Health', 'Documents', 'Memo', and 'Time Log'. Below this, the 'Health' section is active, showing a navigation bar with a back arrow, the month 'May', and view options: 'List View' (circled in red), 'Day', 'Week', and 'Month'. There are also buttons for 'Log Data', a notification bell, and a settings icon. Underneath, there are tabs for different health trackers: 'Weight' (selected), 'Blood Pressure', 'Blood Oxygen', 'Heart Rate', 'Temperature', and 'Respiratory Rate'. The main area displays a table of weight readings.

Date	Weight	Source	Status	Action
2024-05-01 16:29:05	147.5 lbs	Manual	Accepted	Reject
2024-05-02 09:00:00	146 lbs	Manual	Accepted	Reject
2024-05-02 15:51:31	147 lbs	Manual	Accepted	Reject
2024-05-02 16:29:05	147 lbs	Manual	Rejected by Bob Nolan	Accept
2024-05-03 12:31:30	143.08 lbs	Welchallyn_scale_scale100	Accepted	Reject
2024-05-03 12:31:47	146.39 lbs	Welchallyn_scale_scale100	Accepted	Reject
2024-05-03 12:32:08	146.39 lbs	Welchallyn_scale_scale100	Accepted	Reject
2024-05-04 00:23:56	150.13 lbs	Welchallyn_scale_scale100	Accepted	Reject
2024-05-04 00:24:13	145.51 lbs	Welchallyn_scale_scale100	Accepted	Reject
2024-05-04 15:04:07	147.71 lbs	Welchallyn_scale_scale100	Accepted	Reject

At the bottom right of the screenshot, there is a red overlay showing 'Current Session 00:00:38' with a stop button icon.

Accepting or Rejecting a Reading

Synced and manually logged readings can be accepted or rejected by the Clinician/ Provider



The screenshot shows a list view of health trackers. At the top, there are tabs for 'Health', 'Documents', 'Memo', and 'Time Log'. Below this, there's a 'Health' section with a date selector for 'May' and view options: 'List View', 'Day', 'Week', and 'Month'. There are buttons for 'Log Data', a notification bell, and a settings icon. The main area displays a table of health trackers with columns: 'Date', 'Weight', 'Source', 'Status', and 'Action'. The 'Manual' source and 'Reject' action are circled in red.

Date	Weight	Source	Status	Action
2024-05-01 16:29:05	147.50 lbs	Manual	Accepted	Reject
2024-05-02 09:00:00	146 lbs	Manual	Accepted	Reject
2024-05-02 15:51:31	147 lbs	Manual	Accepted	Reject
2024-05-02 16:29:05	147 lbs	Manual	Rejected by Bob Nolan	Accept
2024-05-03 12:31:30	143.08 lbs	Welchallyn_scale_scale100	Accepted	Reject
2024-05-03 12:31:47	146.39 lbs	Welchallyn_scale_scale100	Accepted	Reject
2024-05-03 12:32:08	146.39 lbs	Welchallyn_scale_scale100	Accepted	Reject
2024-05-04 00:23:56	150.13 lbs	Welchallyn_scale_scale100	Accepted	Reject

Select the Patient to view the health readings

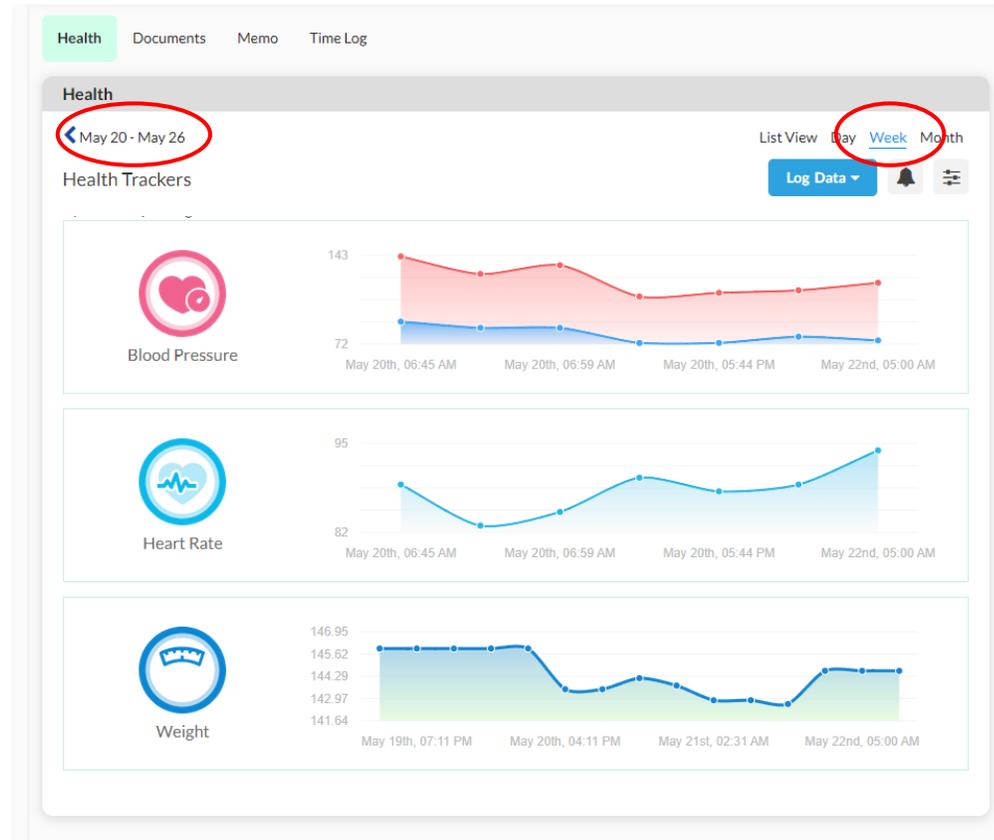
Click **List View**

- A reading's source would display whether it was synced or manually logged.
- Click **Accept/Reject**
- A rejected reading cannot be edited, unless accepted

Changing Chart Views of Readings

- Under the Week view and Month views, a graph of the readings will be shown for every instance of synced and manually logged readings.
- Hovering through the points will show the date, time and reading of the specific measurement type.

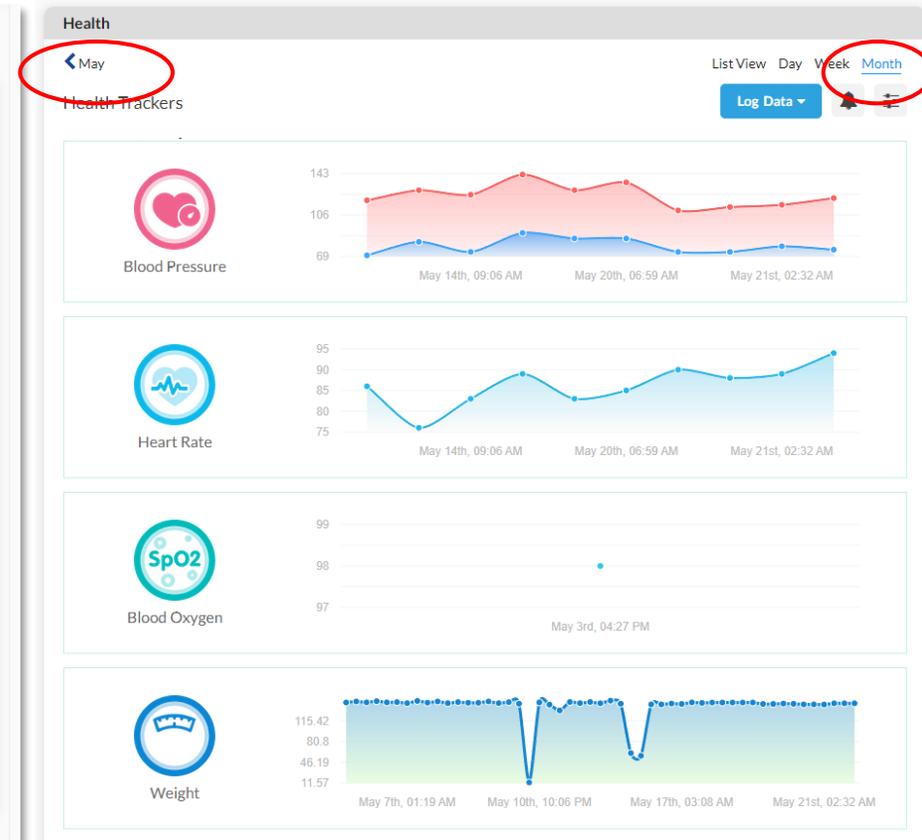
Week View



Tap **Week**

Scroll through the weeks by clicking the arrows

Month View



Tap **Month**

Scroll through the months by clicking the arrows

Log Readings Manually

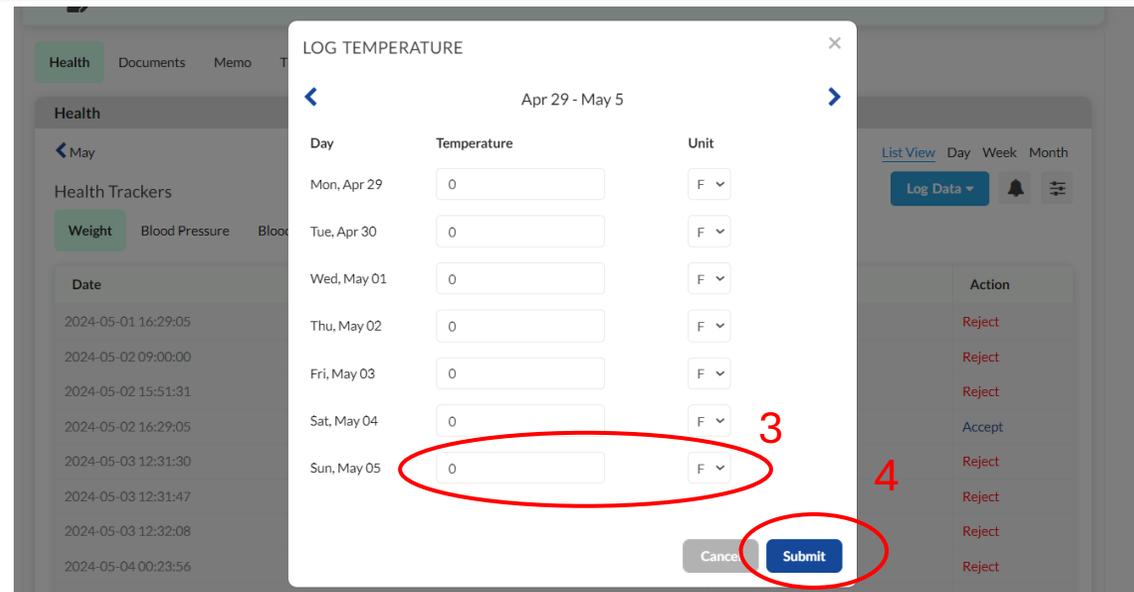
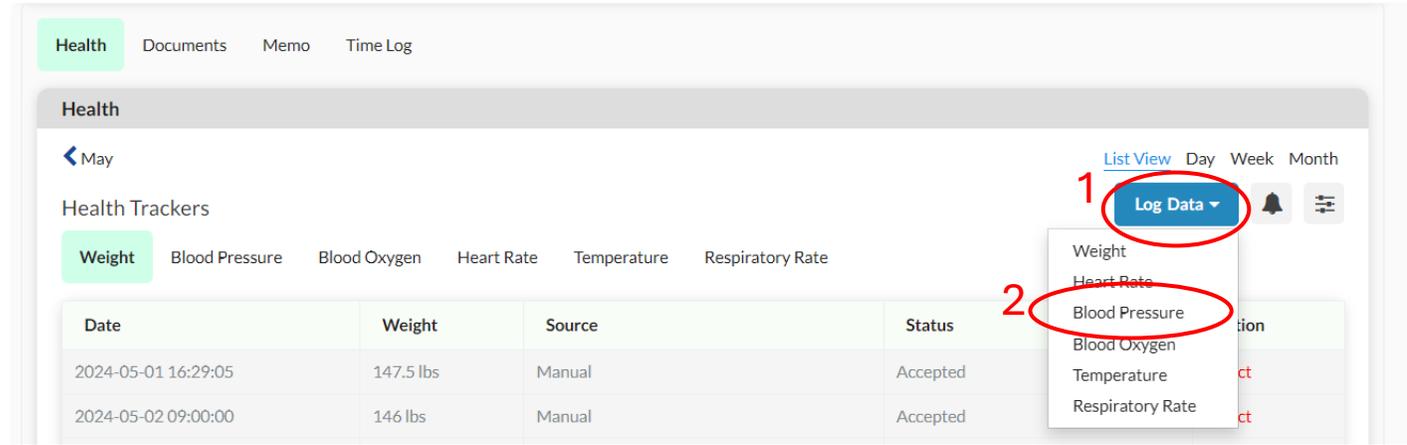
1 - To log readings manually, click on **Log Data**.
A list of the health vitals appears.

2 - Select between Weight, Heart Rate, Blood Pressure, Blood Oxygen, Temperature, and Respiratory Rate.
A weekly log appears.

3 - Manually input the data and select the unit of measurement as necessary.

4 - Click **Submit**.

The *Health Trackers* screen appears with the data saved.



Review and Upload Documents

Files can be uploaded to a patient's record and then viewed or deleted. Click the **Documents** tab.

A table displays containing the following columns for documents:

- Uploaded By - name of who uploaded the file
- Description - file name
- Size
- Date Uploaded
- Action - allows you to View or Delete the file

The screenshot shows the Welch Allyn Home interface for a patient named Betty Rivers. The 'Documents' tab is highlighted with a red circle. Below the patient information, there are tabs for Health, Documents, Memo, and Time Log. The Documents section contains a table with the following data:

Uploaded By	Description	Size	Date Uploaded	Action
Betty Rivers	Change PW 1.png	389K	05/08/2024 05:09 PM	View Delete
Betty Rivers	WAH portal user privileges.pdf	242K	05/08/2024 05:09 PM	View Delete

Additional UI elements include a '+ Upload File' button, a search bar, and a 'Current Session 00:01:38' indicator in the bottom right corner.

Review and Upload Documents - Upload Files

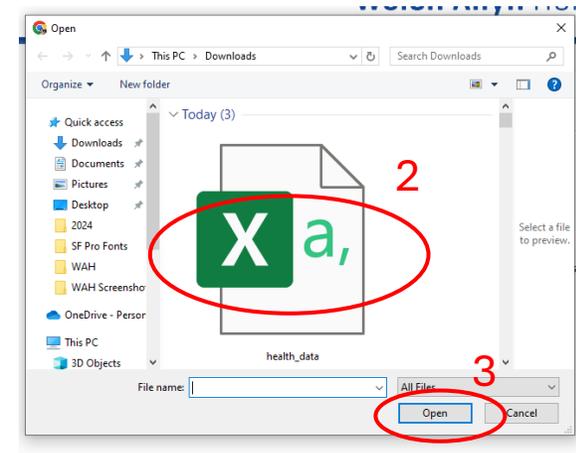
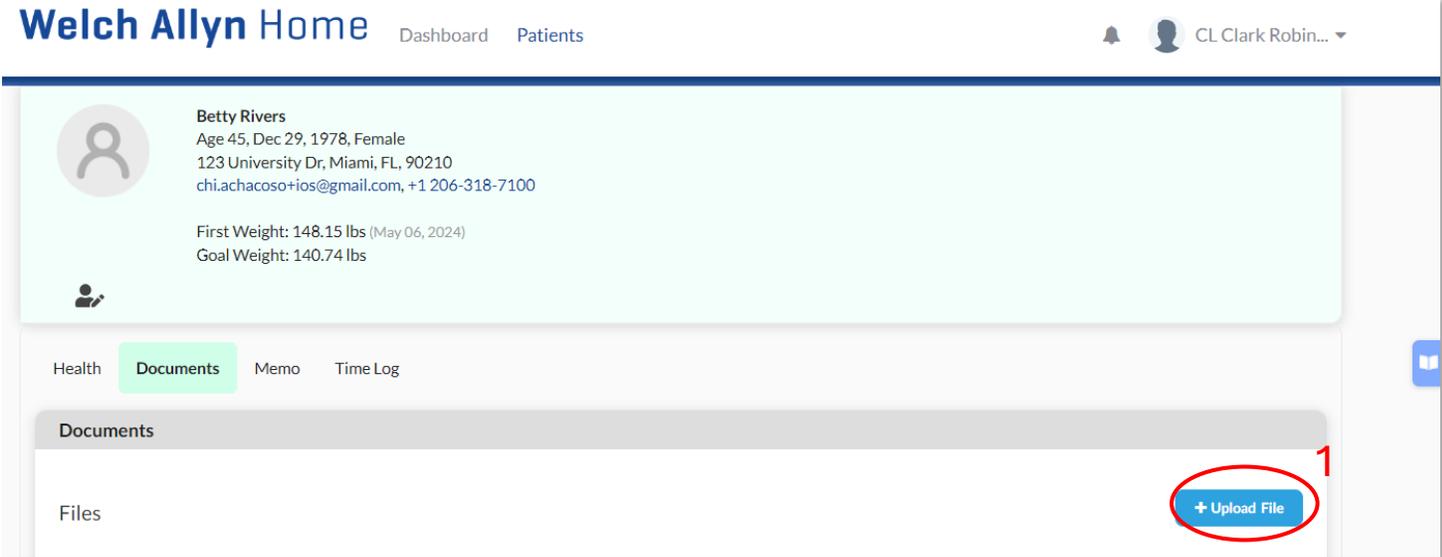
Give a meaningful name to the file to upload as that is what will display in the portal in the Description column.

1 - Click on **+Upload File**.

2 - Browse to and select the file that you want to upload.

3 - Click on **Open** or hit **Enter** on your keyboard.

The file will upload and be displayed in the patient's Documents table.



Review and Upload Documents – View Files

On the right side of the file you would like to see, click on **View** in the Action column.

The file opens in a new browser tab.

Click back to the patient's tab to view it without closing the file.

Close the open file's browser tab when you are done viewing it.

On the right side of the file you would like to delete, click on **Delete** in the Action column.

Click **OK** in the resulting dialogue box or hit **Enter** on your keyboard. The file is deleted from your patient portal.

Welch Allyn Home Dashboard Patients CL Clark Robin...

Betty Rivers
 Age 45, Dec 29, 1978, Female
 123 University Dr, Miami, FL, 90210
 chi.achacoso+ios@gmail.com, +1 206-318-7100

First Weight: 148.15 lbs (May 06, 2024)
 Goal Weight: 140.74 lbs

Health Documents Memo Time Log

Documents

Files + Upload File

Show 25 entries Search:

Uploaded By	Description	Size	Date Uploaded	Action
Betty Rivers	Change PW 1.png	389K	05/08/2024 05:09 PM	View Delete
Betty Rivers	WAH portal user privileges.pdf	242K	05/08/2024 05:09 PM	View Delete

Showing 1 to 2 of 2 entries Previous Current Session 00:01:38

Memo

Memos can be created for easy review of any important notes about the patient’s condition or progress.

Click on **Memo** tab.

Enter a new memo on the field provided and click **Save**.

The recent memo will appear as a sticky note at the top right of the patient profile.

Note: The memos will not appear on the patient portal.

The screenshot displays the patient profile for Betty Rivers. At the top right, a yellow sticky note reads: "Patient needs to be monitored due to high blood pressure" with a "Write a memo" button. Below the profile, the "Memo" tab is selected and circled with a red "1". The memo input area contains a text field with the placeholder "Enter new memo here" circled with a red "2" and a "Save" button circled with a red "3". A recent memo is shown as a sticky note at the top right of the memo input area.

Save or Discard a Timed Patient Review Session

When viewing a patient’s information, a timer at the lower-right will automatically start tracking the duration of the session.

Click on the **timer** (stop icon).

Stop Reviewing Patient Profile appears.

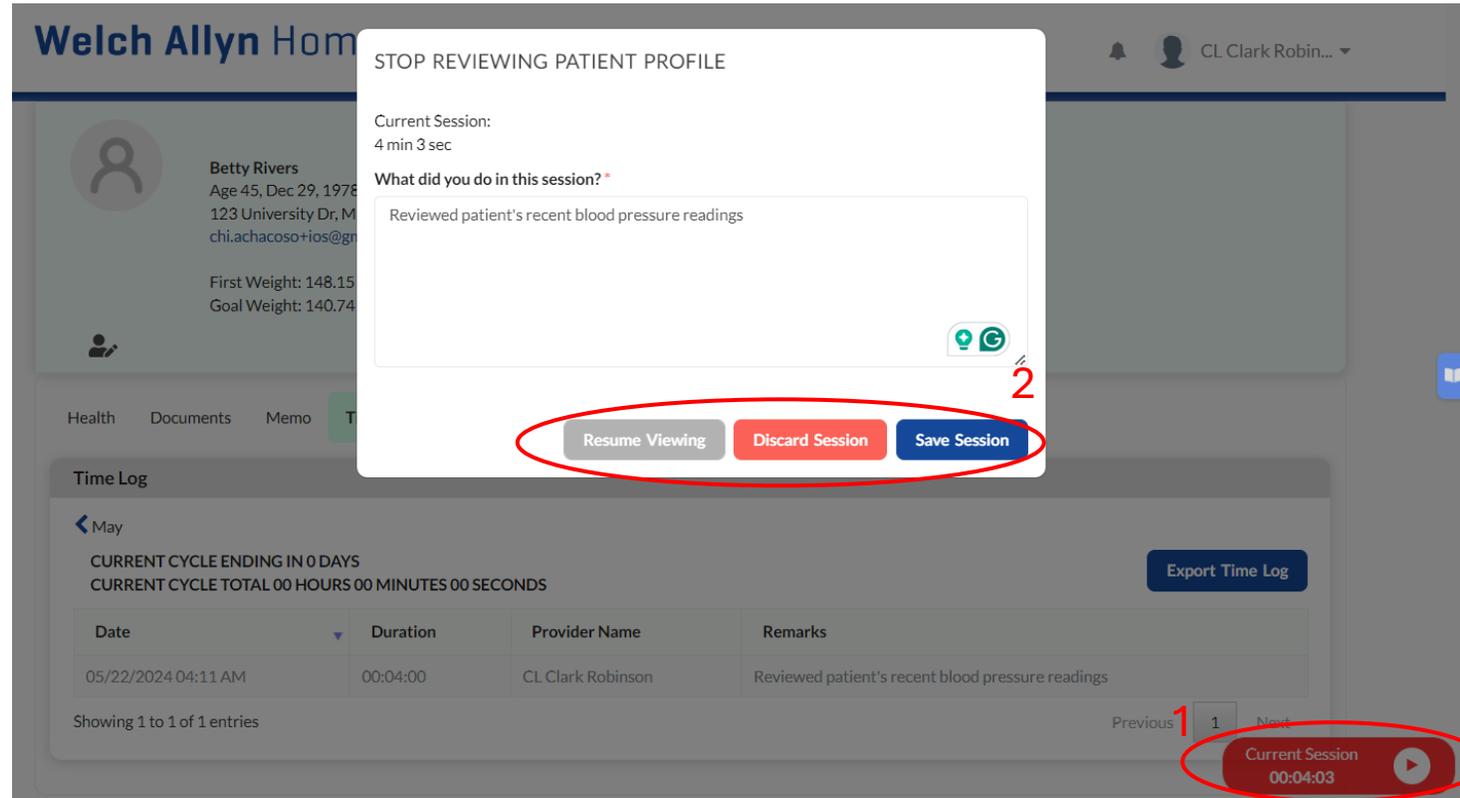
Note: The session Timer automatically pauses.

Write notes or remarks about your review in the box on the screen.

Select to **Save Session**, **Discard Session**, or **Resume Viewing** to resume the sessions without saving.

Note: Saved sessions will be shown under Time Log.

When navigating out of the patient's information without saving the review session, select Leave in the resulting dialogue box to leave without saving or Cancel to continue the review session.



Viewing the Time Log and Notes

The patient's Time Log displays a table showing the data of how long clinicians have spent reviewing a patient's information using the Timer as well as any notes entered.

Click on the **Time Log** tab.

The table contains the following details:

- Date - date and time of the review session
- Duration - the duration of the review session
- Provider Name - the name of the provider who did the review session
- Remarks - shows the notes for the review session

The **Export Time Log** button will pull this information into a spreadsheet in the Downloads folder.

The screenshot shows the Welch Allyn Home interface for a patient named Betty Rivers. The 'Time Log' tab is highlighted with a red circle. Below the patient information, there is a table with one entry for a review session on 05/22/2024 at 04:11 AM, lasting 00:04:00, performed by CL Clark Robinson. The remarks for this session are 'Reviewed patient's recent blood pressure readings'. An 'Export Time Log' button is visible in the top right of the table area. At the bottom right, a red timer shows 'Current Session 00:04:00' with a play button icon.

Welch Allyn Home Dashboard Patients CL Clark Robin...

Betty Rivers
Age 45, Dec 29, 1978, Female
123 University Dr, Miami, FL, 90210
chi.achacoso+ios@gmail.com, +1 206-318-7100

First Weight: 148.15 lbs (May 06, 2024)
Goal Weight: 140.74 lbs

Health Documents Memo **Time Log**

Time Log

May

CURRENT CYCLE ENDING IN 0 DAYS
CURRENT CYCLE TOTAL 00 HOURS 00 MINUTES 00 SECONDS

Export Time Log

Date	Duration	Provider Name	Remarks
05/22/2024 04:11 AM	00:04:00	CL Clark Robinson	Reviewed patient's recent blood pressure readings

Showing 1 to 1 of 1 entries

Previous 1 Next

Current Session 00:04:00

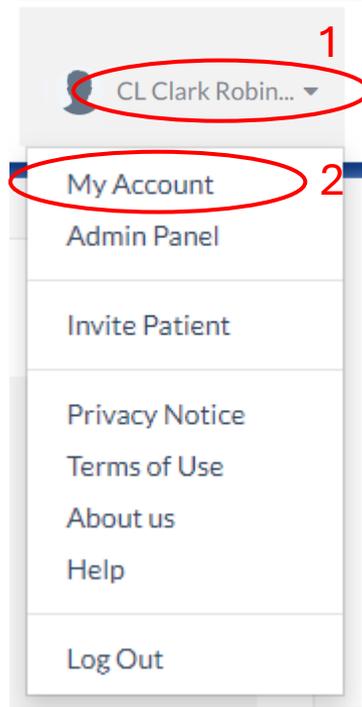
Setting General Risk Notification for Patients

Unlike Risk range Settings, Risk notification settings (General and Individual can only be managed by the Clinician/Provider.

You can customize the risk notification settings for all your patients. This overrides the clinic-wide settings managed by the admin user.

1 - Click **your name** on the top right side of the menu bar.

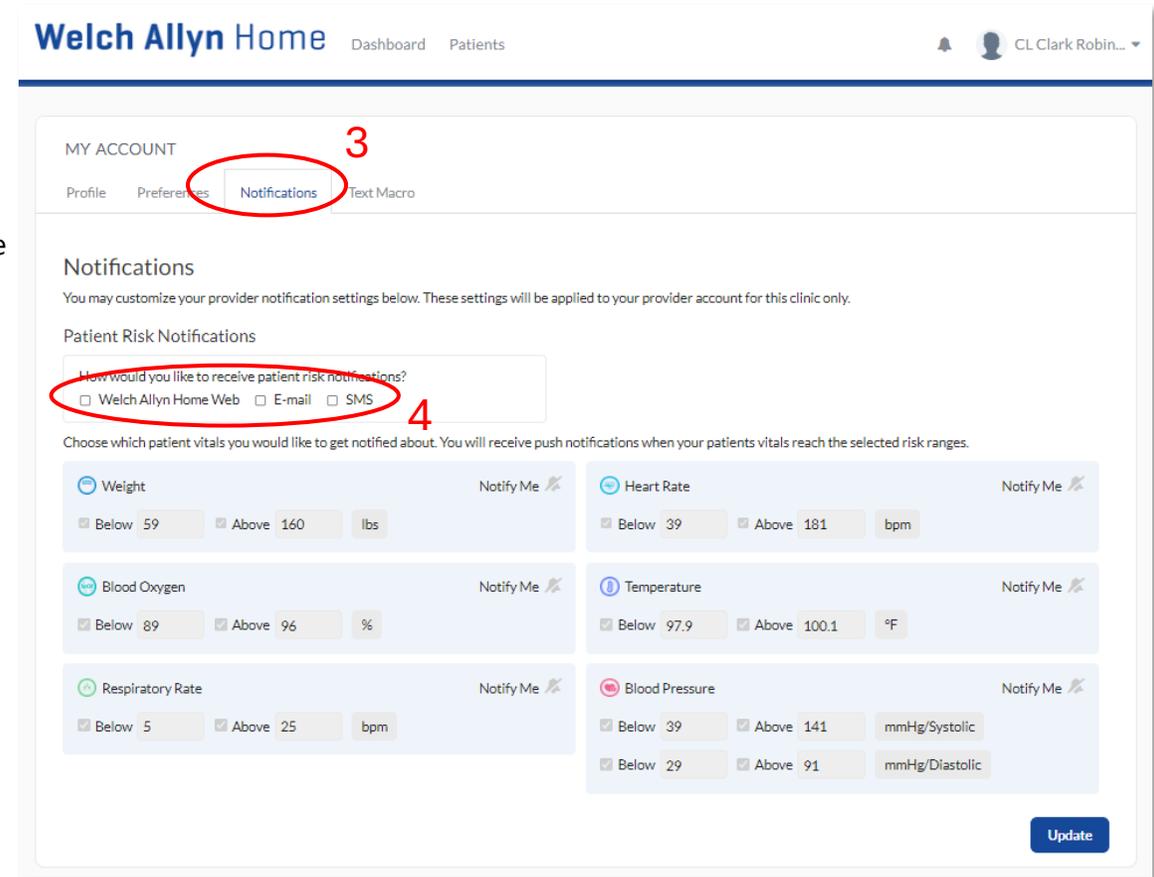
2 - Click **My Account**.



The *My Account* screen appears.

3 - Click **Notifications** tab.

4 - Check the box(es) of the medium(s) that you would like to receive patient risk notifications on (portal website, E-mail, or SMS)



Setting General Risk Notification for Patients – cont'd

5 - Choose the patients' health vitals that you would like to be notified on by clicking on the **bell** next to Notify Me for that vital. The bell may appear as light gray and then darkens when selected.

6 - Update the values for below or above risk range settings you would like to be notified of
 Note: Notifications will only be received for health vitals with the Notify Me bell activated.

7 - Click **Update**.
 A message appears to say updates were successful.

The screenshot shows the 'Welch Allyn Home' interface with the 'Notifications' tab selected. Under 'Patient Risk Notifications', there are three radio button options: 'Welch Allyn Home Web', 'E-mail', and 'SMS'. Below this, a section titled 'Choose which patient vitals you would like to get notified about...' contains a grid of vital signs. Each vital sign has a 'Notify Me' button with a bell icon. Red circles and numbers highlight the following elements:

- 5**: The 'Notify Me' button for Blood Pressure.
- 6**: The 'Below' and 'Above' risk range input fields for Blood Pressure.
- 7**: The 'Update' button at the bottom right of the page.

Changing Risk Notification for Individual Patients

The Clinician and Provider can customize how they want to receive risk notifications for specific patients.

Changes made on an individual patient’s risk notification settings override the general notification settings for patients, and the clinic-wide settings managed by an admin.

Patient Name	Weight	Heart Rate	Blood Pressure	Blood Oxygen	Temperature	Respiratory Rate	Actions
Betty Rivers Age 45, Female	142.64 lbs <i>a day ago</i> 02:32 AM	89 bpm <i>a day ago</i> 02:32 AM	115/78 mmHg <i>a day ago</i> 02:32 AM				⋮
John Addams Age 42, Male	152 lbs <i>5 hours ago</i> 12:00 AM	100 bpm <i>5 hours ago</i> 12:00 AM	120/129 mmHg <i>5 hours ago</i> 11:59 PM	95 % <i>5 hours ago</i> 11:59 PM	99 °F <i>5 hours ago</i> 12:00 AM	20 bpm <i>5 hours ago</i> 12:00 AM	⋮
Stella Evans Age 44, Female							⋮

Showing 1 to 3 of 3 entries

Previous 1 Next

The first location to customize a patient’s risk notification is on the Dashboard > Readings table.

- 1 - Click on the **3 dots** or **ellipsis**.
- 2 - Select **Edit Risk Notification**.

Changing Notification Ranges for Individual Patients – cont'd

The second location is to do it on the Patient portal > Health tab.

1 - Click on the **bell** next to Log Data.

The *Override Risk Notifications for [patient name]* appears.

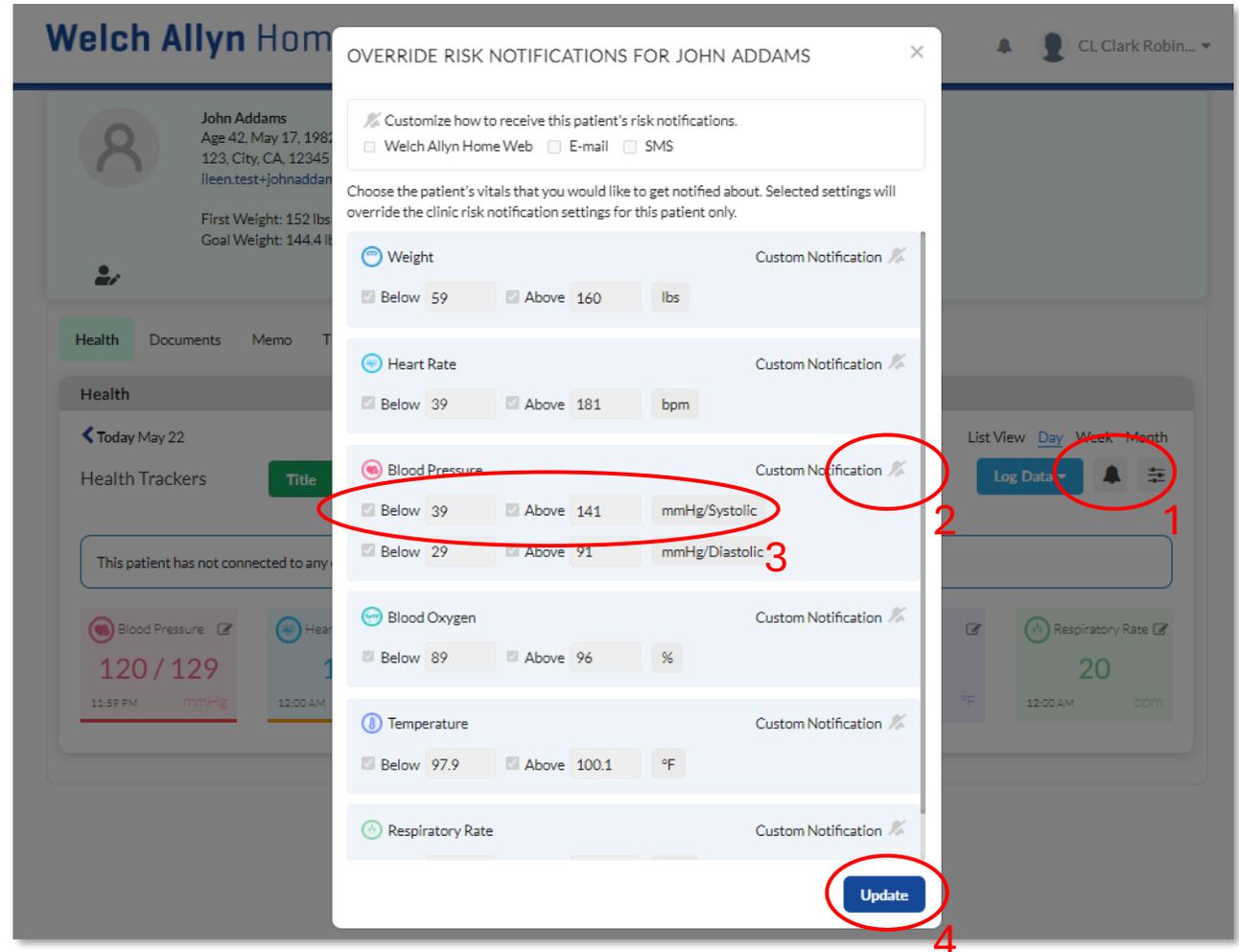
Select how to receive risk notifications for the patient (Welch Allyn Home Dashboard, E-mail, or SMS).

2 - Click the **Custom Notification bell** of the patient's health vitals.

3 - Update the values for readings below or above risk range settings to be notified on.

Note: Notifications will only be received for boxes that are checked.

4 - Click **Update**.



Changing Risk Ranges for Individual Patients

The Dashboard chart is based on the summary of range information pulled from all your patients.

Risk ranges can be set differently for individual patients so the Dashboard is not skewed if your patients have varying states of what is considered normal for their individual conditions.

Changes made to an individual patient’s risk range settings override the general settings for your patients and clinic-wide settings managed by an admin.

Note: Changes to range settings apply to future readings. Established ranges for existing readings will not change.

The first location to customize a patient’s risk ranges is on the Dashboard > Readings table.

Click on the **3 dots** or **ellipsis**.
Select **Edit Risk Range**.



Patient Name	Weight	Heart Rate	Blood Pressure	Blood Oxygen	Temperature	Respiratory Rate	Actions
Betty Rivers Age 45, Female	142.64 lbs a day ago 02:32 AM	89 bpm a day ago 02:32 AM	115/78 mmHg a day ago 02:32 AM				⋮
John Addams Age 42, Male	152 lbs 5 hours ago 12:00 AM	100 bpm 5 hours ago 12:00 AM	120/129 mmHg 5 hours ago 11:59 PM	95 % 5 hours ago 11:59 PM	99 °F 5 hours ago 12:00 AM	20 bpm 5 hours ago 12:00 AM	⋮
Stella Evans Age 44, Female							⋮

Showing 1 to 3 of 3 entries

Changing Risk Ranges for Individual Patients – Cont'd

The second location is to do it on the Patient profile of an individual patient's Health screen.

Click on the **slider** next to the bell.
The *Risk Range Setting* for the patient appears.

Click the **Custom box** of the patient's risk range setting to customize it.
Move the slider points to change the ranges for risk categories.
Click **Update**.

The changes are saved and the Health screen for the patient is displayed.

The screenshot displays the 'RISK RANGE SETTING FOR JOHN ADDAMS' dialog box. The dialog box contains the following settings:

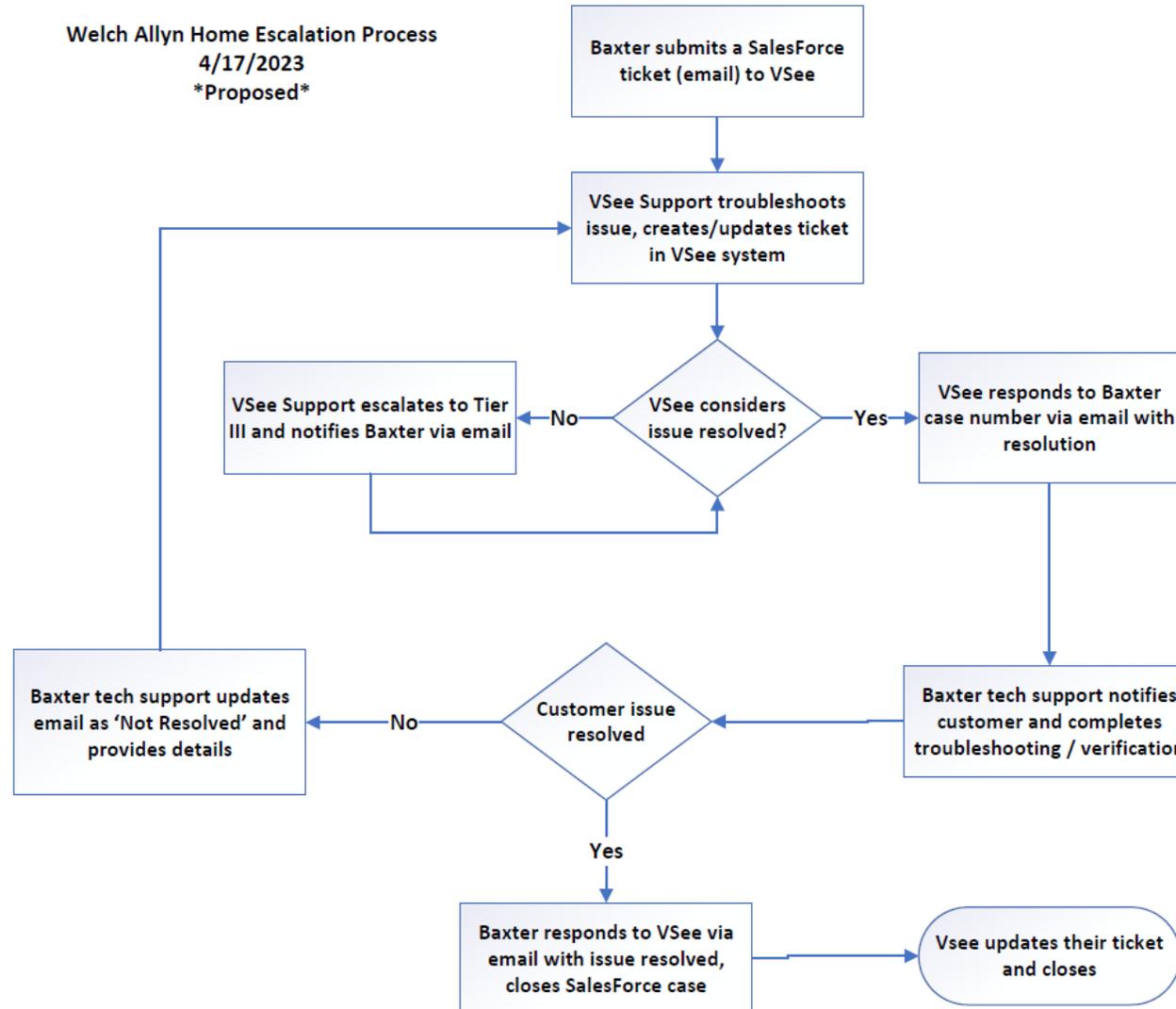
- Weight (lbs): Custom
- Heart Rate (bpm): Custom
- Blood Pressure (mmHg): Custom
 - Systolic: 0, 40, 90, 120, 140, 300
 - Diastolic: 0, 30, 60, 80, 90, 200
- Blood Oxygen (%): Custom
- Temperature (°F): Custom
- Respiratory Rate (bpm): Custom

The 'Update' button is located at the bottom right of the dialog box.



Welch Allyn Tech Support

Escalation Path



Submission of Ticket

Welch Allyn sends a Salesforce email to: help@vsee.com

Subject line: Welch Allyn Home Support Ticket – Issue

Information required for VSee to successfully begin troubleshooting the issue:

- User's Email Address
- Provider device (include if Mac/PC/Chromebook; Browser used) OR Patient device (Include if iPhone/ Android/ iPad; OS version)
- Detailed description of the issue
- Screenshot of the error (recommended)
- Steps to reproduce the error (recommended)
- Frequency of the error
- Recent changes or updates
- Any workarounds attempted
- Any other relevant information that may help in troubleshooting

Acknowledgment of Ticket

VSee Support will send a confirmation email to Welch Allyn to confirm if sufficient information was received, and that the ticket is already in queue for processing.

VSee Support then troubleshoots the issue, creates/ updates ticket in VSee system

Ticket Update

If VSee Support needs to escalate the issue to Tier 3 support and would need more time to resolve the issue (past 24 hrs from the time issue was received), VSee Support will inform Welch Allyn by sending an update on the same email thread received.

Ticket Resolution

- Once VSee considers the issue resolved, VSee will respond to the email thread started by Welch Allyn with the resolution
- Welch Allyn Tech Support notifies customer and completes troubleshooting/verification
- If the customer confirms that issue has been resolved, Welch Allyn will notify VSee through the same email thread that the issue has been resolved. Welch Allyn Tech Support will close the case. VSee will update and close the ticket on their side.
- If the issue is not yet resolved, Welch Allyn Tech Support updates the email as “Not resolved” and provides details > VSee Support will then acknowledge and troubleshoot the issue on their end.

Clinical Registration

The registration page (given out by Sales rep):

https://clinic.welchallynhomecp.com/pages/clinic_trial?template_code=wahprovider

If a Practice Owner (Administrator) filled out the registration page but did not receive an email:

- Ask the user to check their Spam / Junk / Promotion / Other / Clutter folder in case the email was marked as spam.

Clinician/ Provider Account

- Portal users can edit their account details.
- If a user forgets their password, then they can use the password reset feature. This will result in an email with a temporary password.
- Sys admin users can also edit account details. So if there is a sys admin in the office, that person can edit the account for the user.

Patient Sign-up and Acceptance of Follow Request

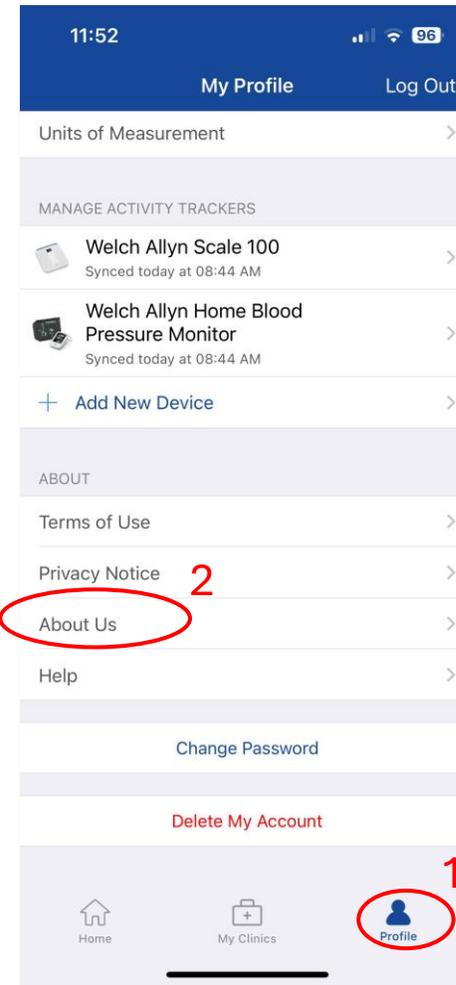
- Once the Clinician/Provider invites a Patient, the patient will receive a notification in their App that the Clinician wants to follow their readings.
- [The patient must accept this notification in the App](#) for the Clinician to be able to see their data.
- Patient status in the Portal:

Action	Patient Account Status
Clinician creates account	Pending
Patient accepts “Follow” request.	Inactive
Patient has sent reading in last 30 days	Active

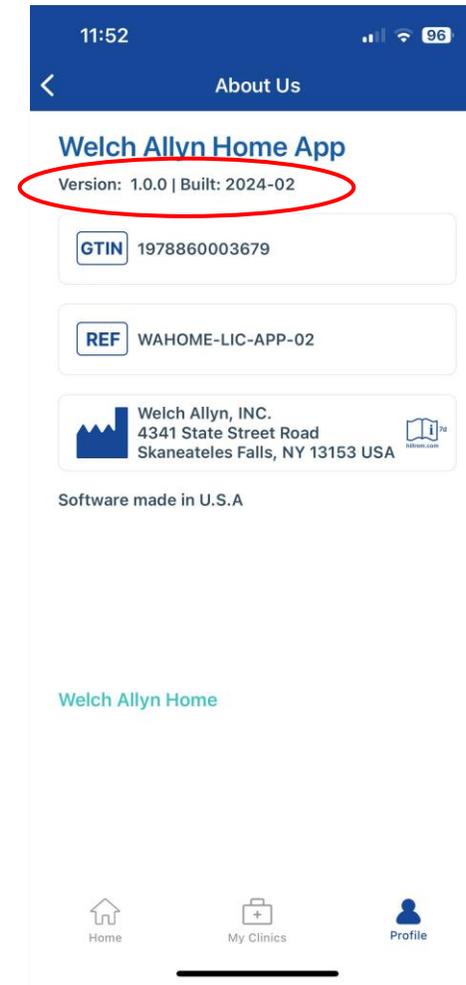
- Once the patient has accepted the request, the clinician can access the patient’s details in the portal.

Updates

- App Updates are delivered through the Apple App Store and Google Play, respectively.
- The user is notified in the normal manner of App updates.



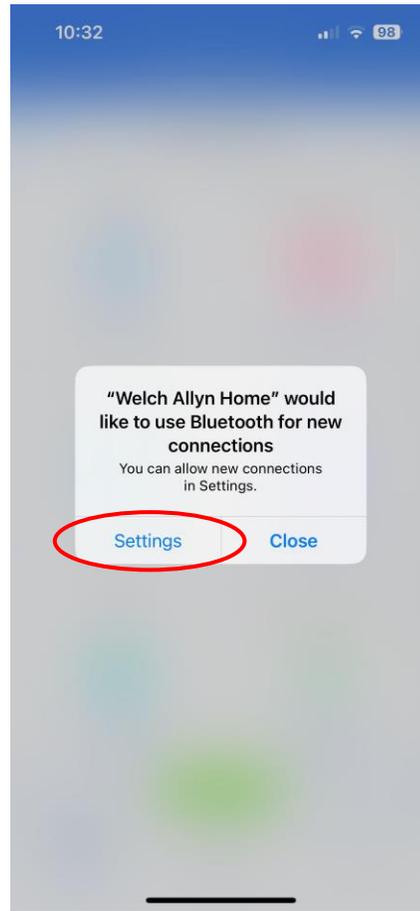
- 1 – Tap the **Profile** icon
- 2 – Tap **About us**



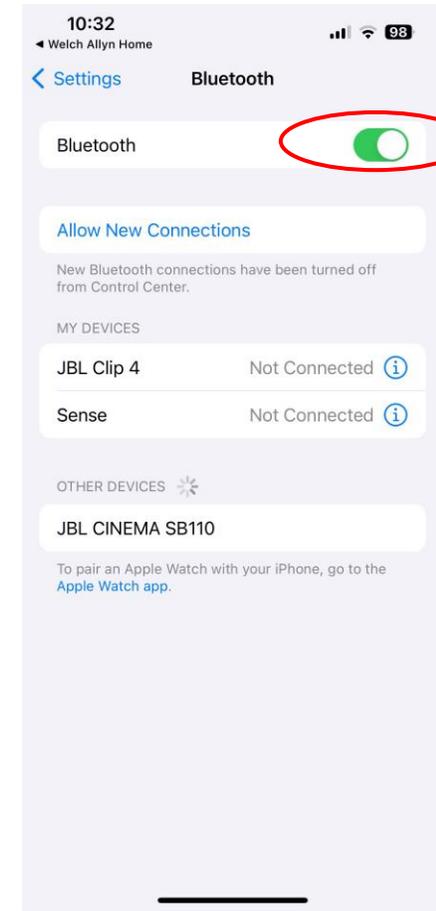
The version number is right below the Welch Allyn home app logo

Bluetooth

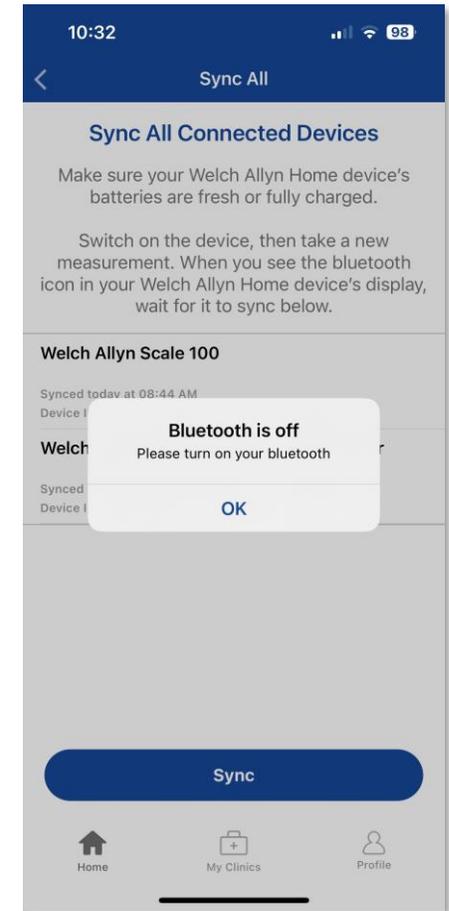
- If BT is switched off in the phone, the App will ask the user to switch it on. It will only do this if the user attempts to sync readings
- The device and phone need to be near each other (within 5 feet / 1.5m).
- Pair in the App, not the phone settings!
- The device will NOT show up in the phone's BT device list!



Tap **Settings** to open the Bluetooth Settings screen



Keep the Bluetooth slider **ON**



This pop-up appears if the user taps **Close** instead of **Settings**.

Device Pairing and Syncing

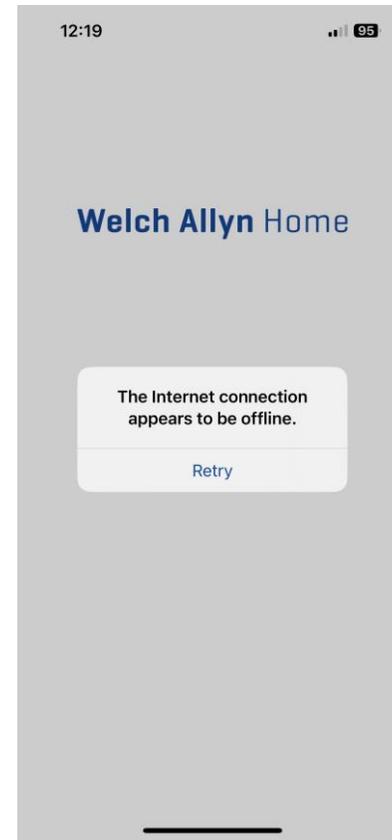
If pairing or data transmission fails, try this:

1. Close the App and start it again.
2. Disable and then re-enable Bluetooth in Phone Settings.
3. Shut down and restart the phone.
4. If the App crashes repeatedly, try uninstalling and re-installing the App.

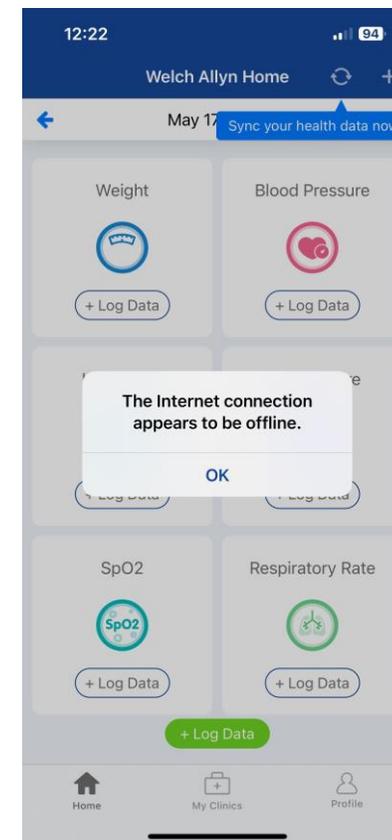
Note: A variance range of +/- 0.1 exists between the scale reading and app display for weight due to the conversion formula between kilograms and pounds.

Internet Connection on the Phone

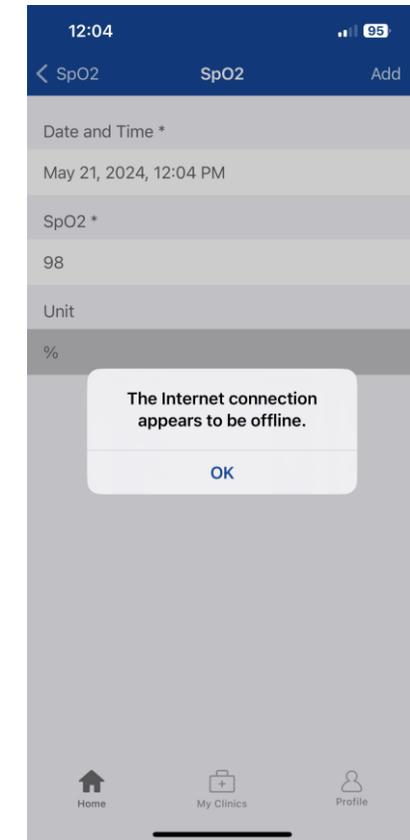
- In order to install or communicate with the Cloud-based Welch Allyn Home system, the phone needs to have Internet access.
- Access to data would be limited, pop-ups showing internet connection is offline, and prompts to turn on data would be shown.
- Verify if internet connection is available by navigating to www.welchallynhome.com (Settings→About).
- If using Cellular, verify that the App is not blocked from Cell Data access in Phone Settings.
- Establishing and maintaining Internet connection is the customer's responsibility.



The User cannot sign in to the WAH app without internet connection



The User cannot sync data without internet connection



The User cannot manually log in a reading without internet connection

Patient Account Issues

Email

- Depending on the mail client, the messages may end up in folders called Junk or Spam, or may be listed under Promotions or “Other” (as in “not Focused”). Customers may not be familiar with how to locate these items
- The email address used must be for an active account: sign-up and password reset messages are sent to that email address.
- If the user no longer has access to the email address they signed up with, and they forget their password: The System Users, or Clinician can [set up a temporary password for the patient](#).

Patient Account Issues – cont'd

Account creation

- If the patient is signed up by their clinician, their account is immediately created. If the patient then goes into the App, requests a new account to be created, and enters the same email address as provided to their clinician: they will get an “account already exists” error.
- Instead, they should log in with their email and temporary password, not create a new account.
- WAH Accounts are uniquely identified by the email address.
- An Account (email address) can either be a Patient Account or a Clinician Portal Account – not both.
- If a clinician wants to have a Portal account and also an account to test the App, they will need to use 2 different email addresses. If they try the same address they will receive an “account already exists” error.

Account-related Email

Email

- Emails are sent as part of the sign-up process, and when the user requests a password reset.
- Email addresses used for WAH accounts must be live email accounts that the user has access to.
- Patient account **email address cannot be changed**. Correct spelling is essential.
- Clinician account email address can be changed by the clinic's sys admin.

Password

- Clinician account passwords can be changed by the user and by the sys admin.
- Patient account password can be changed by the user in the App. This can also be reset by the System Users and Clinician.
- Password resets can be done by the user themselves, but they **must** have access to the email account.

Account-related Email – cont'd

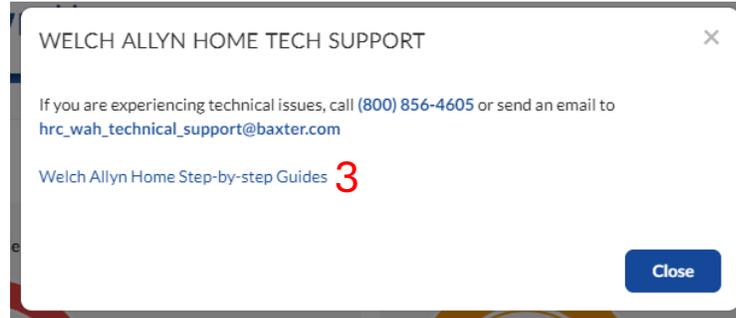
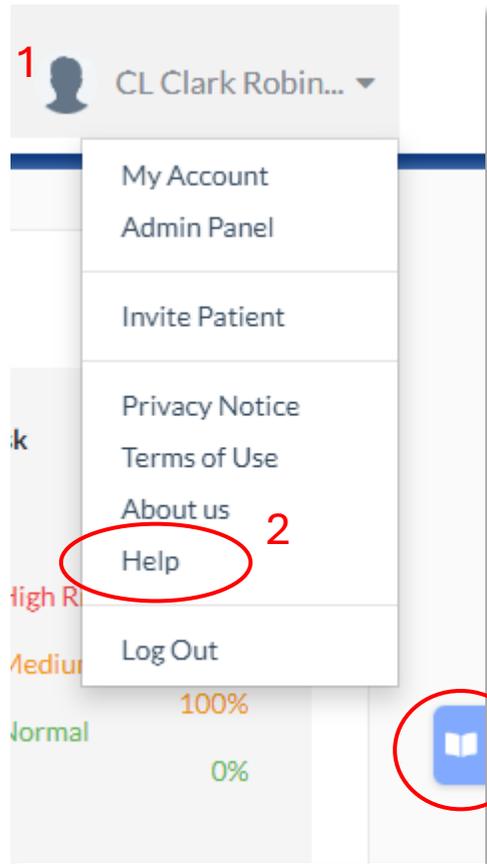
WAH email may be marked as Spam by the email client that the customer uses.

- Outlook:
“Other” tab on home screen, or “Clutter” or “Junk” in desktop and web versions.
- Android Gmail app: “Promotions” folder
- iOS mail app: “Junk e-mail” folder
- There are other mail apps, each may do this slightly differently.

Self-help Links

Video Tutorial	https://youtu.be/6goMfeugUbQ	Learn about the different user workflows
KBA Directory	URL	When to Use
Admin	https://help.vsee.com/kb/articles/493-welch-allyn-home-admin-help-directory	Guide users with Admin Panel access
Clinician	https://help.vsee.com/kb/articles/help-articles-directory	Guide Clinicians/Providers in navigating the health dashboard and managing patients
Patient	https://help.vsee.com/kb/articles/468-wah-patient-directory	Guide patients
Sales Rep	https://help.vsee.com/kb/articles/494-welch-allyn-home-sales-rep-and-cs-help-directory	Guide the Sales Rep with additional information
Troubleshooting	https://help.vsee.com/kb/articles/490-troubleshooting-directory	Access troubleshooting guides and different KBA directories
Welch Allyn Home Training Documentation	https://www.hillrom.com/en/knowledge/resources/welch-allyn-home-training-documentation/	Downloadable videos and guides

Self-help Links – cont'd



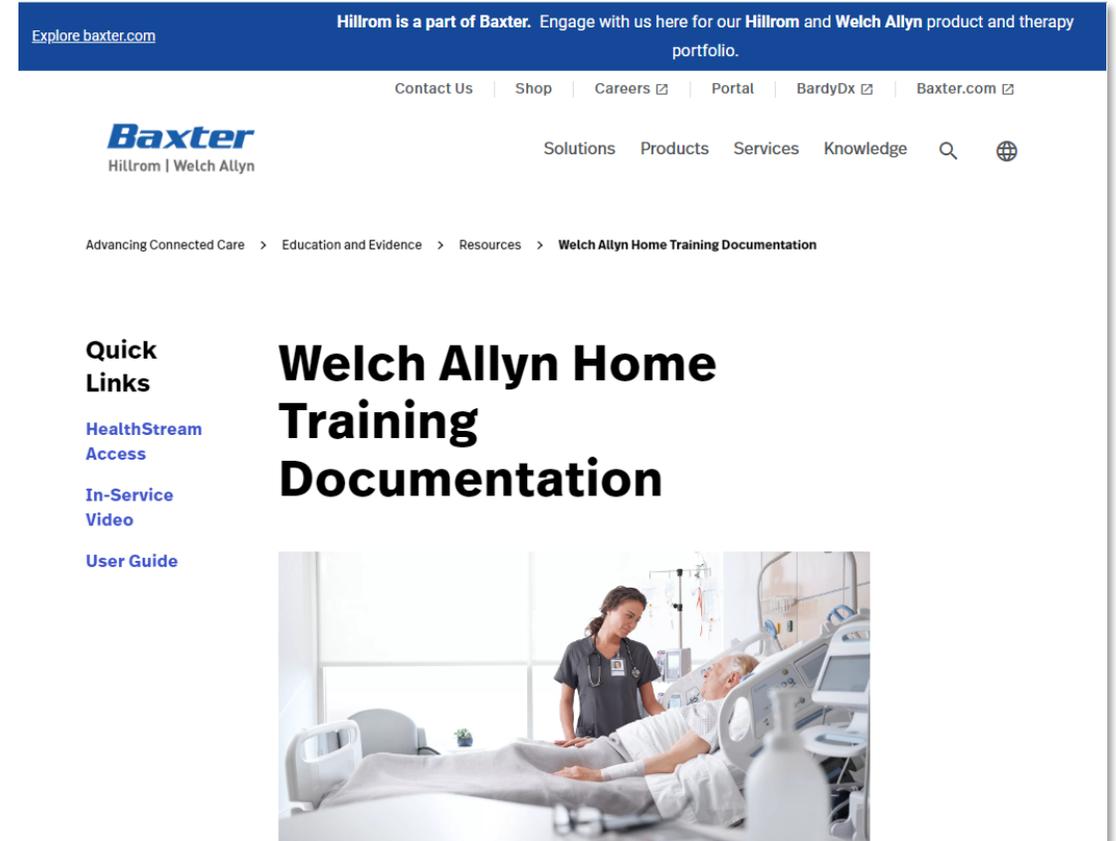
Help

- 1 - Click name on the right side of the menu bar
- 2 - Click **Help**
- 3 - Click **Welch Allyn Home Step-by-step Guides**

Blue Bar Documentation

Hover over the blue bar with the book icon on the right side of the screen

Click **Documentation**

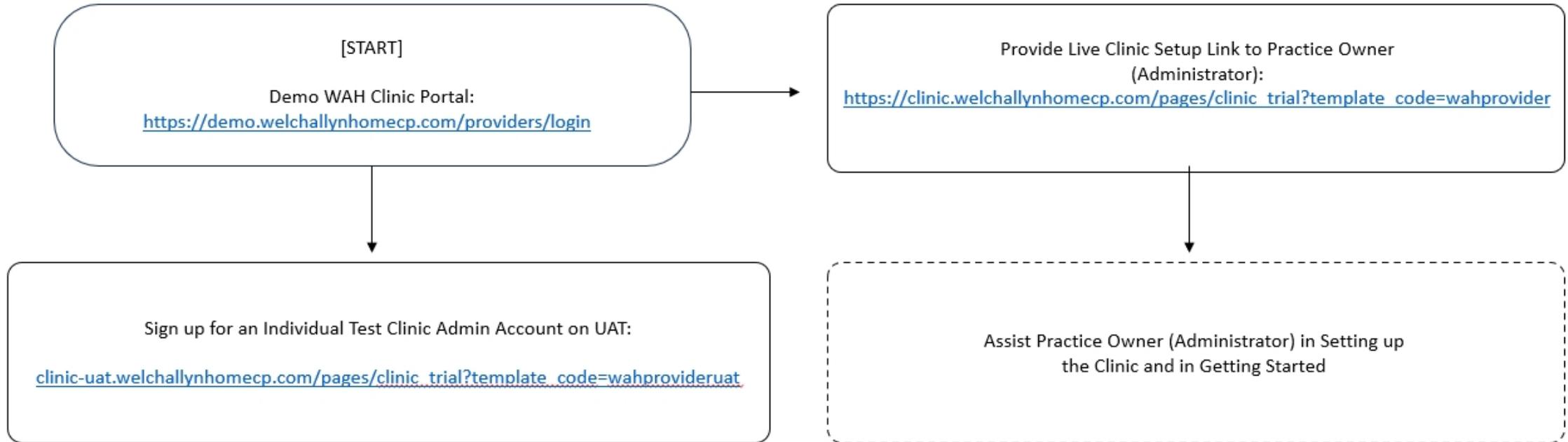


The Welch Allyn Home Training Documentation will open on another tab.



Sales Rep

Sales Rep Workflow



Demo Clinic

Access to the Welch Allyn Home demo Clinic is through:

<https://demo.welchallynhomecp.com/providers/login>

Username: wah_demo@baxter.com

Password: WahD3M0!

- There is only one account that would be shared by the sales reps
- Navigate to show the clinic portal to practice owners (The demo Clinic has dummy accounts and readings)
- Limitation: Cannot show how to invite patients

Welch Allyn Home

[Help](#)

The screenshot shows the 'PROVIDERS Log In' page. It features two input fields: 'Email' and 'Password', both with eye icons for toggling visibility. Below the fields is a blue 'Log In' button and a 'Forgot Password?' link.

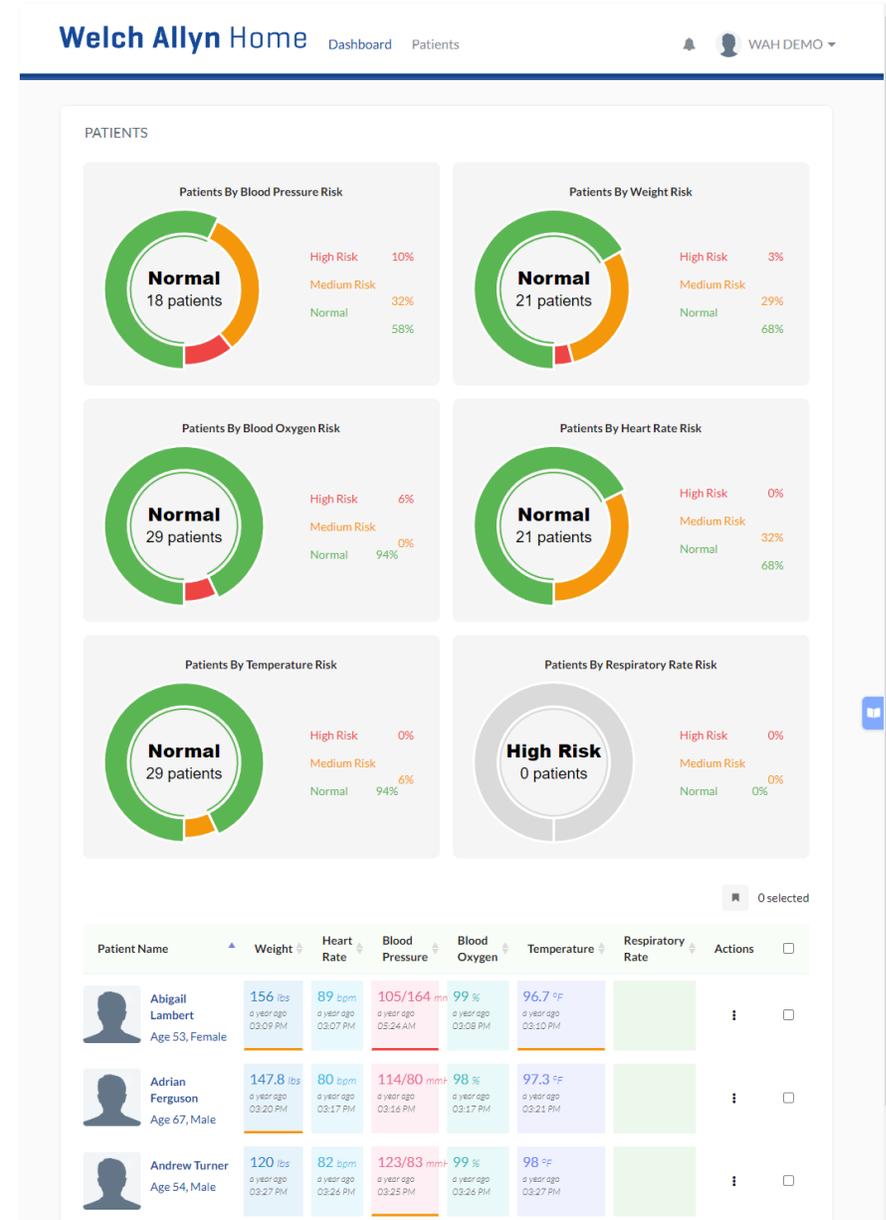
Enter the username and password

Click **Log In** to save the changes

Dashboard

The Demo Clinic has dummy accounts with readings that replicate a Clinician/Provider’s view of the Clinic Portal.

The Sales Rep can navigate, click on Patients and charts, set risk range settings and risk notification settings, etc. to show the clinic portal functionalities to practice owners.



Limitation

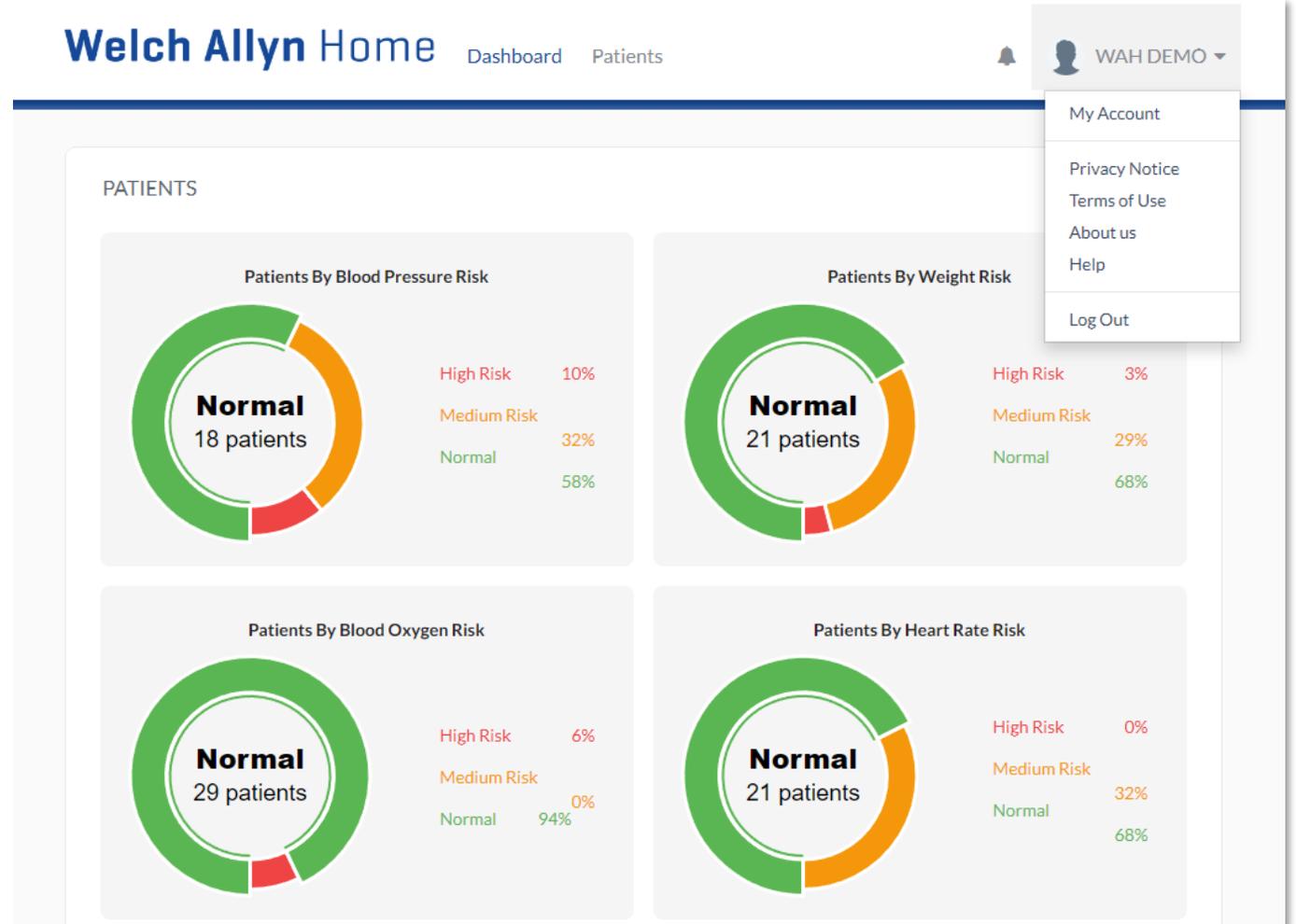
The Demo Clinic, however, does not allow the Sales Rep to invite a Patient.

To be able to test/ or show how to Invite a Patient, the Sales Rep may sign up for an account in our UAT sign-up page:

clinic-uat.welchallynhomecp.com/pages/clinic_trial?template_code=wahprovideruat

It is not advised for a Sales Rep to sign up for a test Clinic using the actual URL given to practice owners.

Click **Edit**



Sign-Up/ Register a New Clinic

Once the Practice Owner(Administrator) is ready to set up his own Welch Allyn Home Clinic, the Sales Rep will share this URL where the Practice Owner can set up his Clinic:

https://clinic.welchallynhomecp.com/pages/clinic_trial?template_code=wahprovider

Click **Edit**

Sales Rep: Important Links

Type of Account	URL	When to Use
Demo Account	https://wah-demo.vsee.me/providers/healthdemo.welchallynhomecp.com https://demo.welchallynhomecp.com/providers/login Username: wah_demo@baxter.com Password: WahD3M0!	<ul style="list-style-type: none"> - One account to be shared by diff. sales reps - Navigate to show the clinic portal to practice owners (has dummy accounts and readings) - Limitation: Cannot show how to invite patients
UAT Sign-up	clinic- uat.welchallynhomecp.com/pages/clinic_trial?template_code=wahprovideruat	<ul style="list-style-type: none"> - Sign up for an individual test Clinic Admin account - Navigate, test, invite a patient, create users, etc.
Live Clinic Sign-up	https://clinic.welchallynhomecp.com/pages/clinic_trial?template_code=wahprovider	<ul style="list-style-type: none"> - When the Clinic Admin is ready to create an account