Welch Allyn Home

Welch Allyn Home App and Clinic Portal Training

Table of Contents

Table of Contents

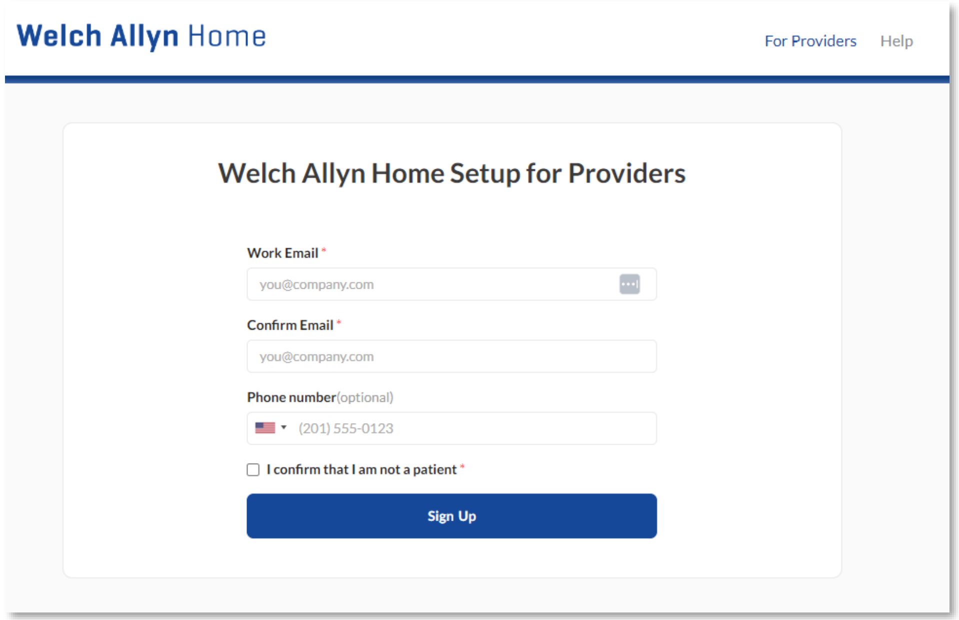
Admin

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.welchallynhomecp.com/pages/clinic_trial?template_code=wahprovider.

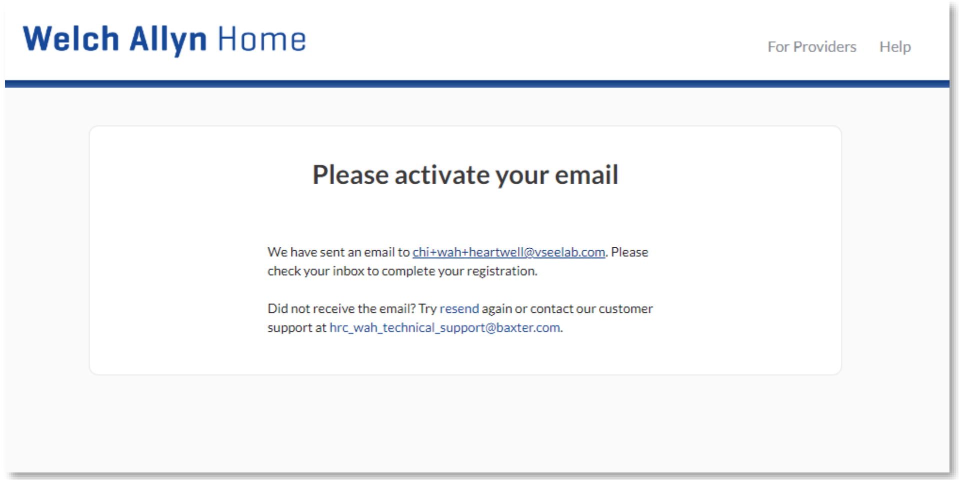
Existing Welch Allyn Home Clinics will be migrated to the New Welch Allyn Home Clinic Portal



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

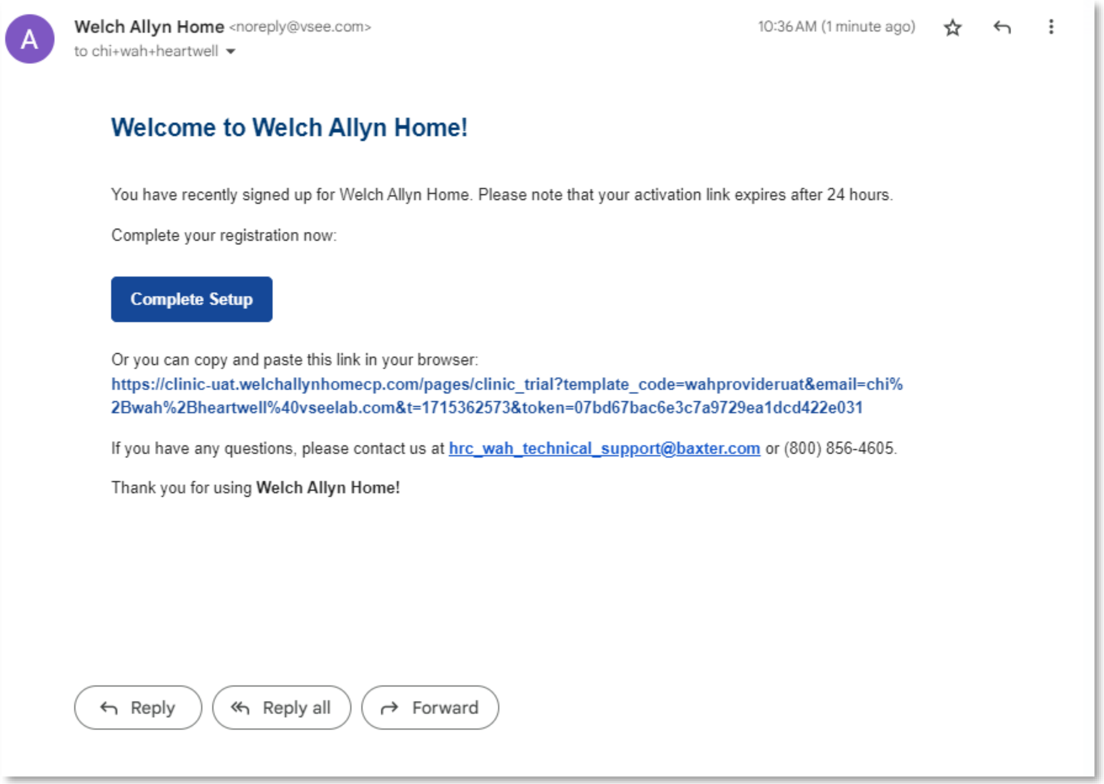
Click the checkbox to confirm that the user is not a patient.

Click **Sign Up**



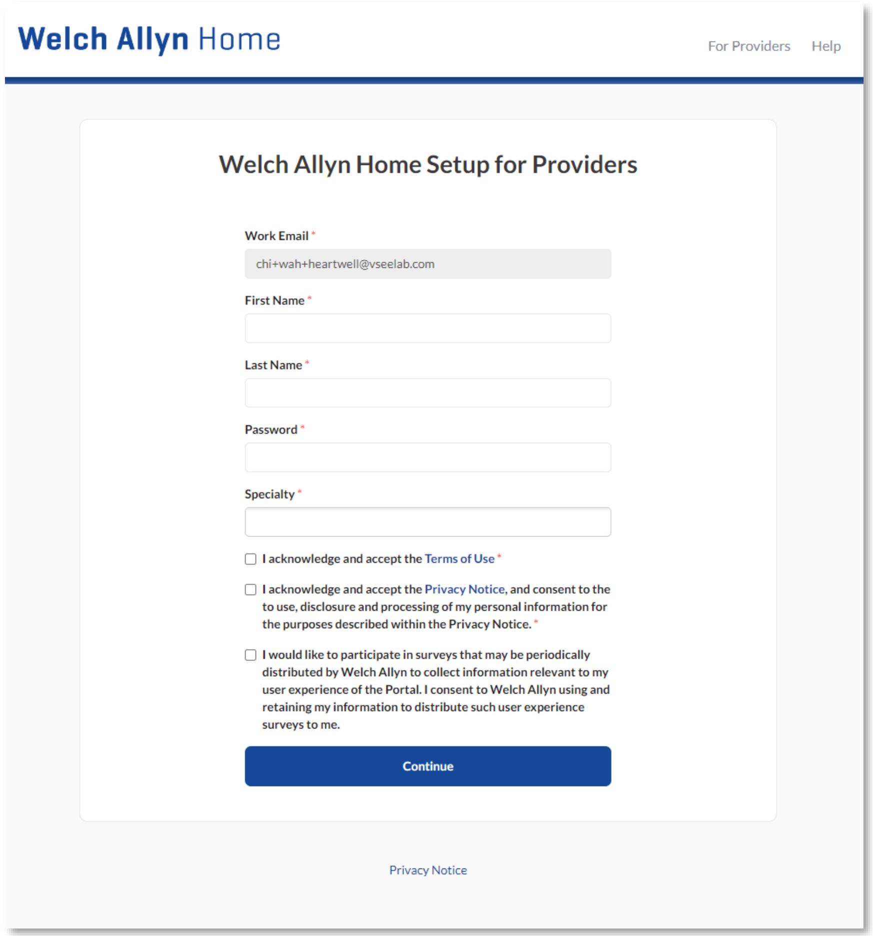
A popup will appear instructing the user to check their email to complete their registration.

Registering the Clinic – cont'd



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

Click **Complete Setup.**



Fill in all required fields.

Set a password that meets the requirements

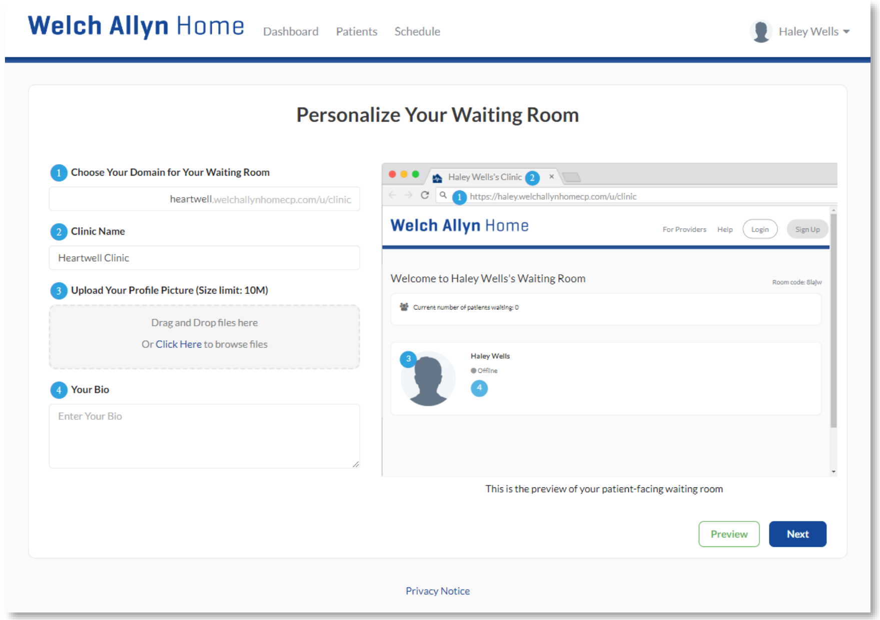
Review the Terms and Conditions and click the boxes to agree with the Terms of Services and Survey Participation

Click **Continue**

Registering the Clinic – cont'd

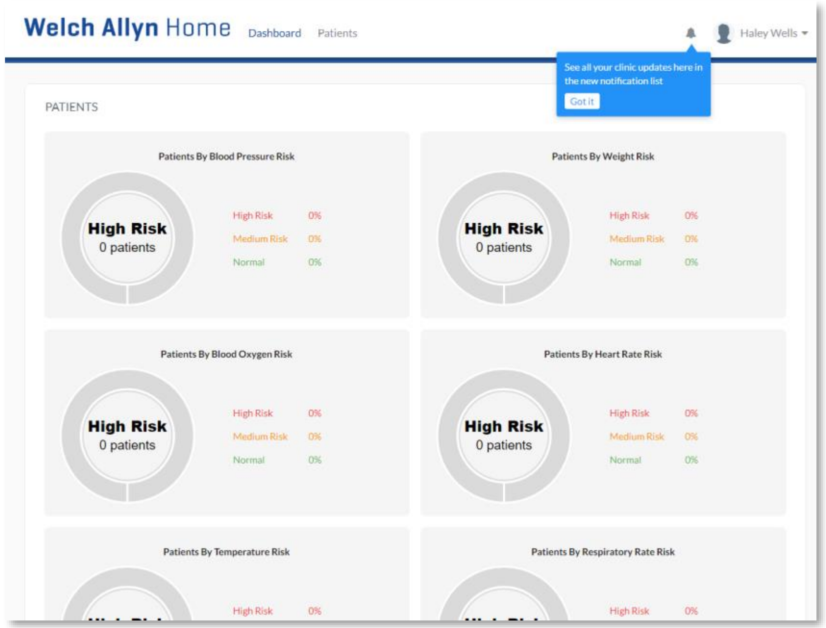
The one who signs up for the Clinic becomes the Administrator by default.

The Administrator has both Provider and Admin access.



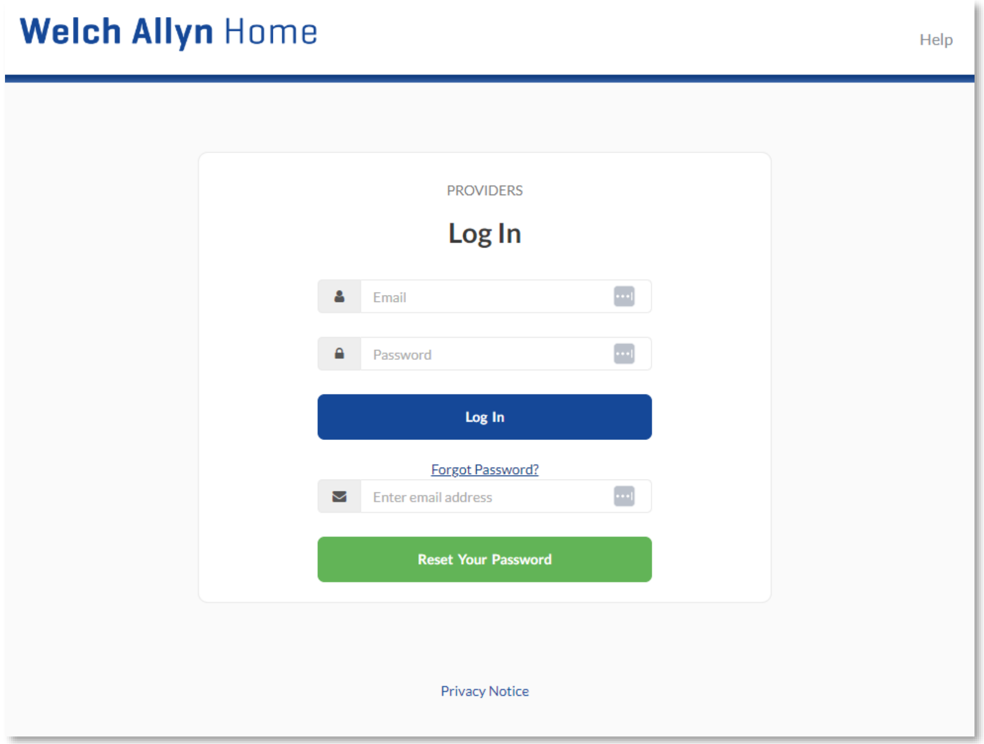
The Administrator can personalize the Waiting Room of the Clinic. All fields are optional to edit.

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



The Dashboard screen appears.

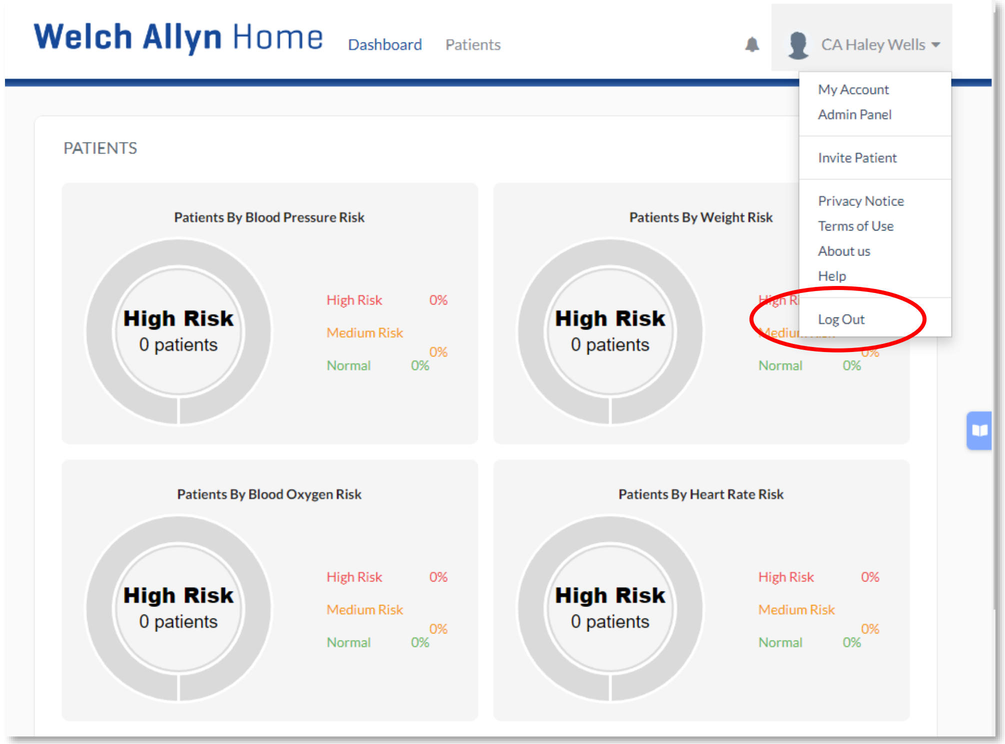
Logging In for the First Time



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

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

Logging Out



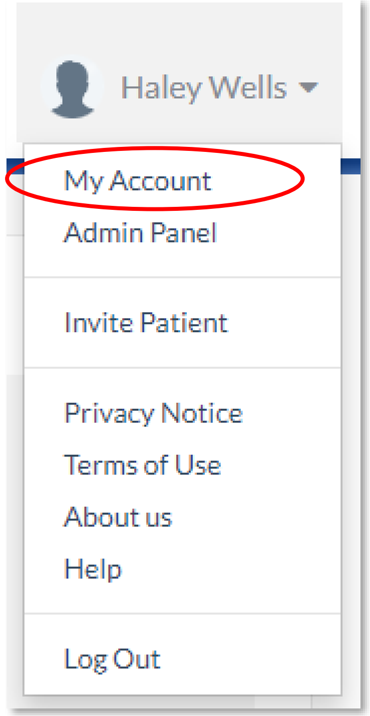
Click Profile Menu on the far right of the menu bar and click **Log out.**

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

Changing Password in the Portal

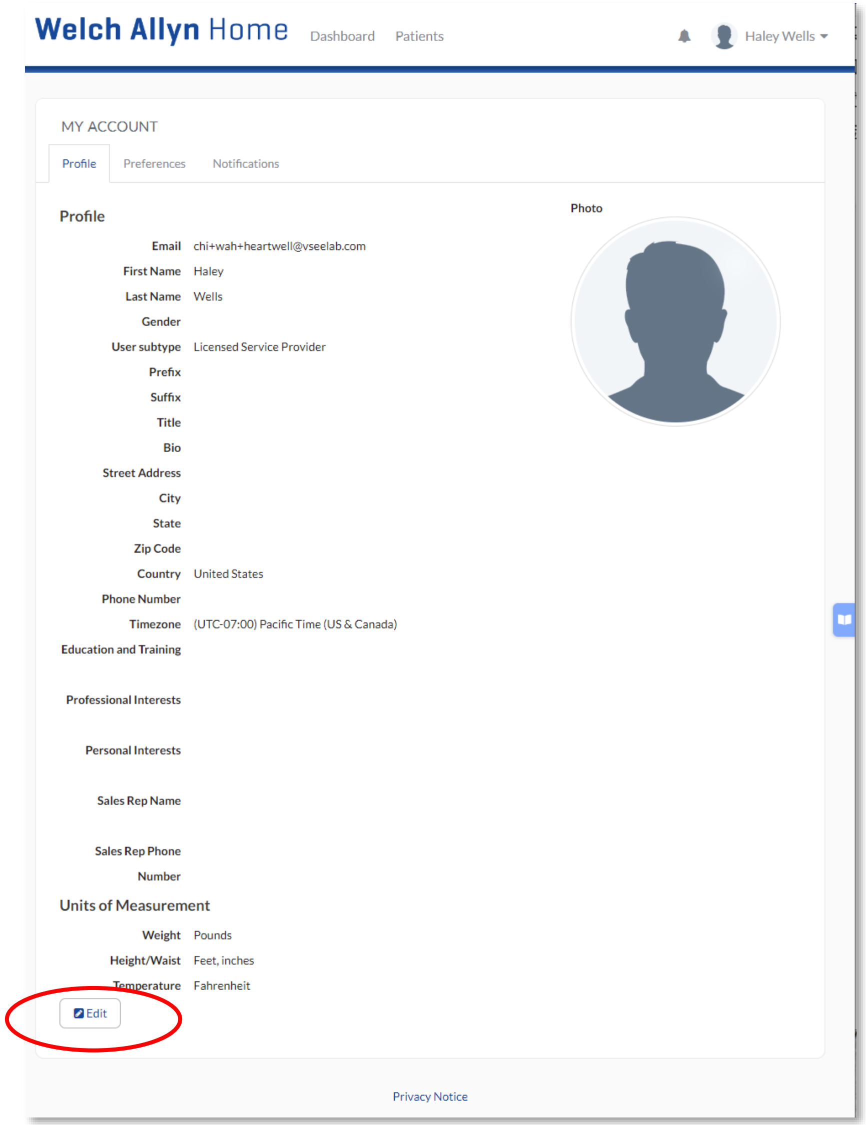
The user can also change their password once they have logged in the Clinic Portal.

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



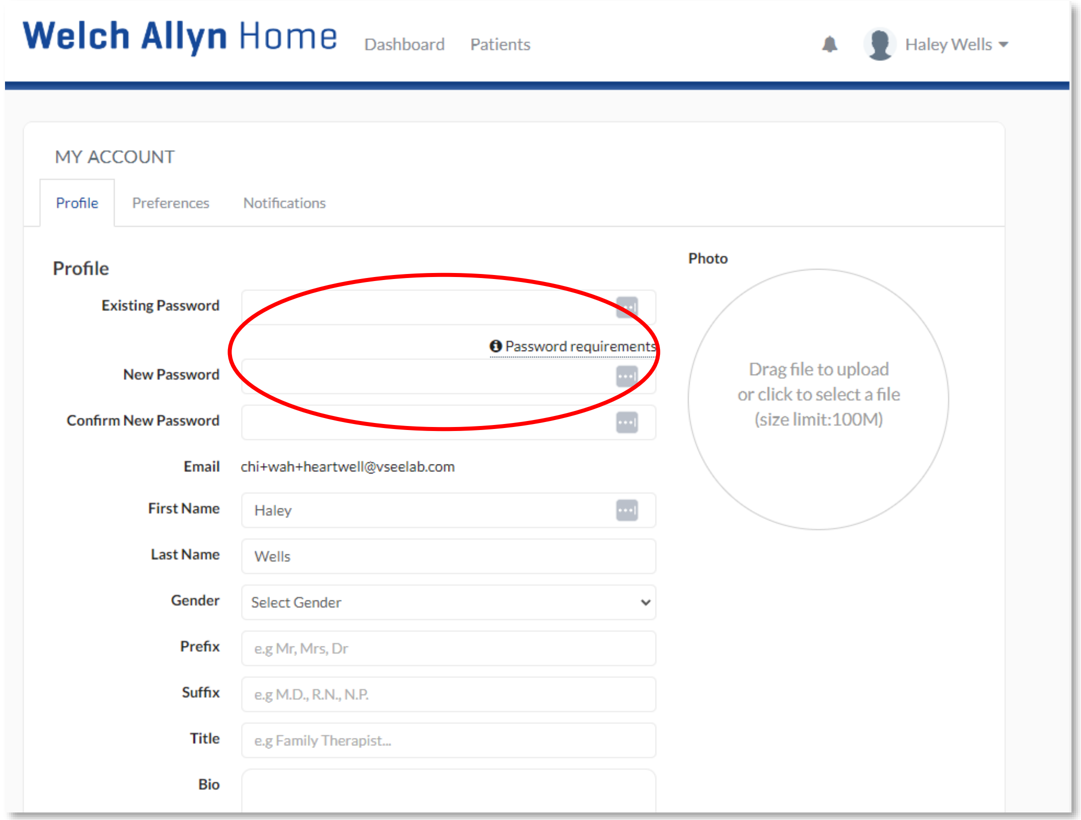
Click name on the right side of the menu bar.

Click **My Account**.

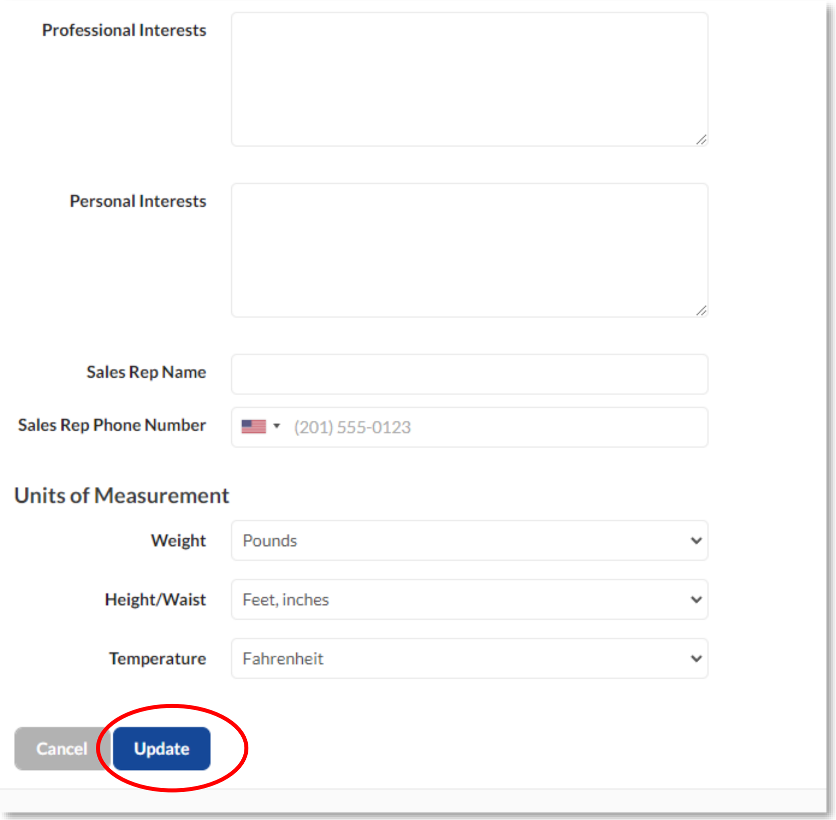


Under the Profile tab, click **Edit.** The password fields do not appear until Edit is clicked.

Changing Password in the Portal – cont'd



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



Scroll down

Click **Update** to save the changes

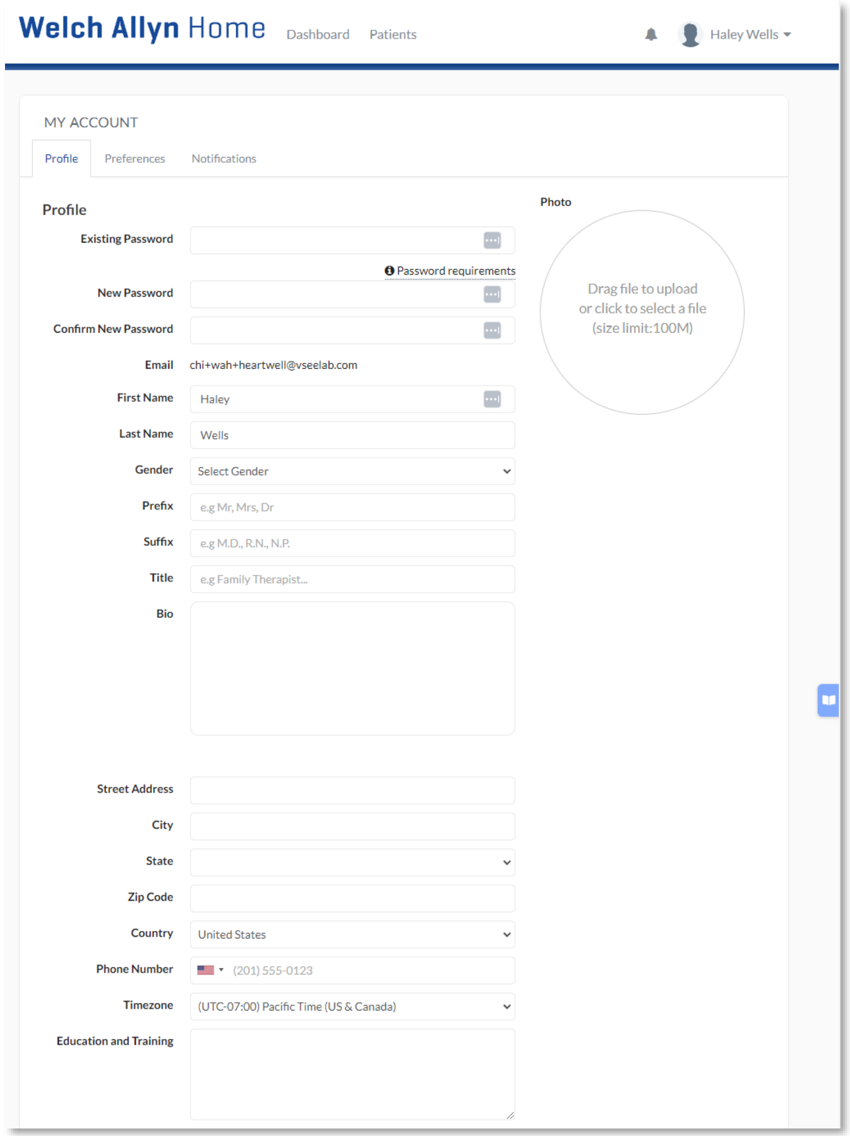
Changing the User Profile

Profile information can be updated.

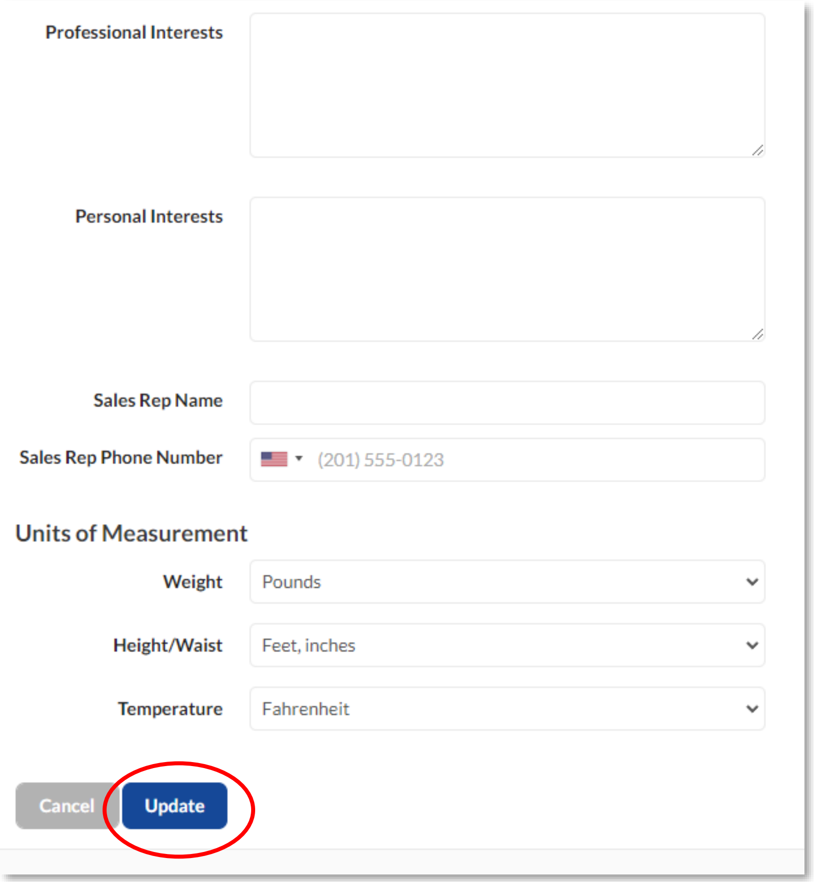
Follow the same initial steps on changing the password in the portal:

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



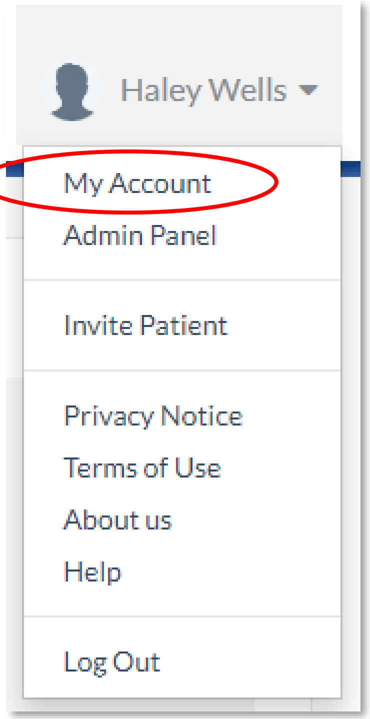
Update the profile information using the editable fields



Click **Update** to save the changes

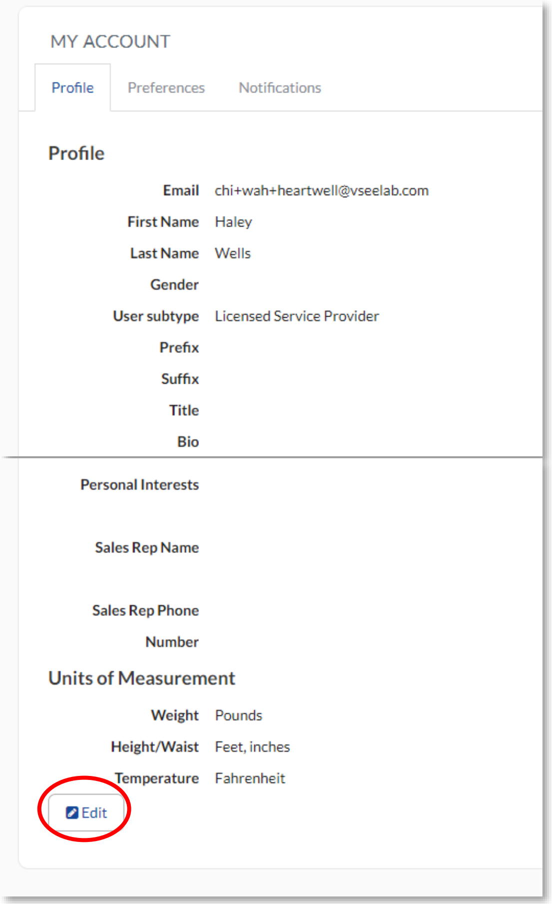
Revoking Consent to Participate in Surveys

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

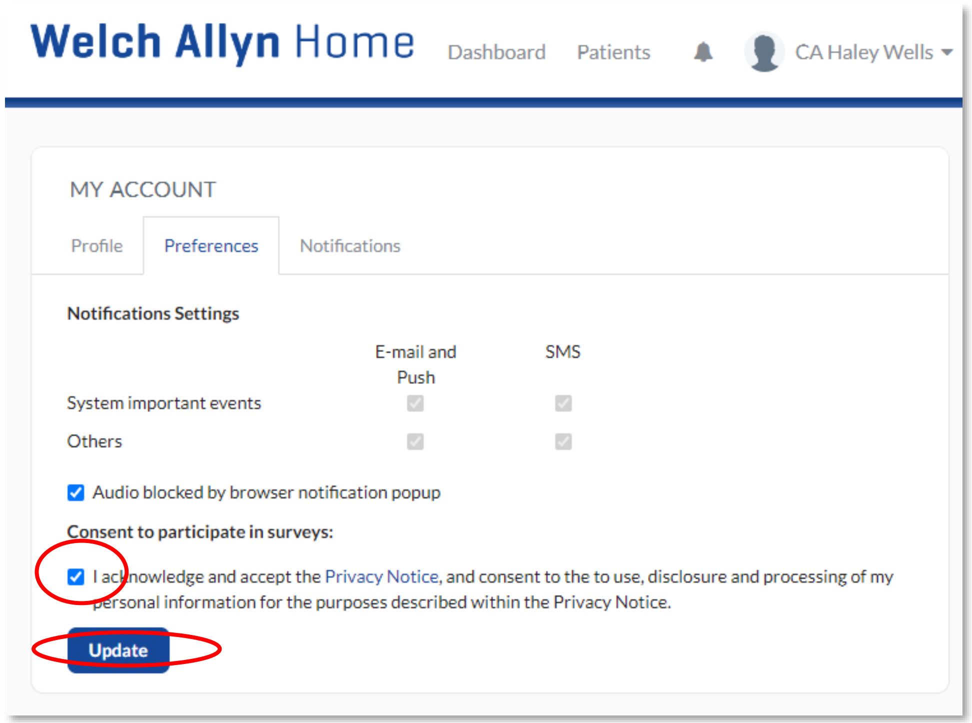


Click name on the right side of the menu bar.

Click **My Account**.



Click **Edit**



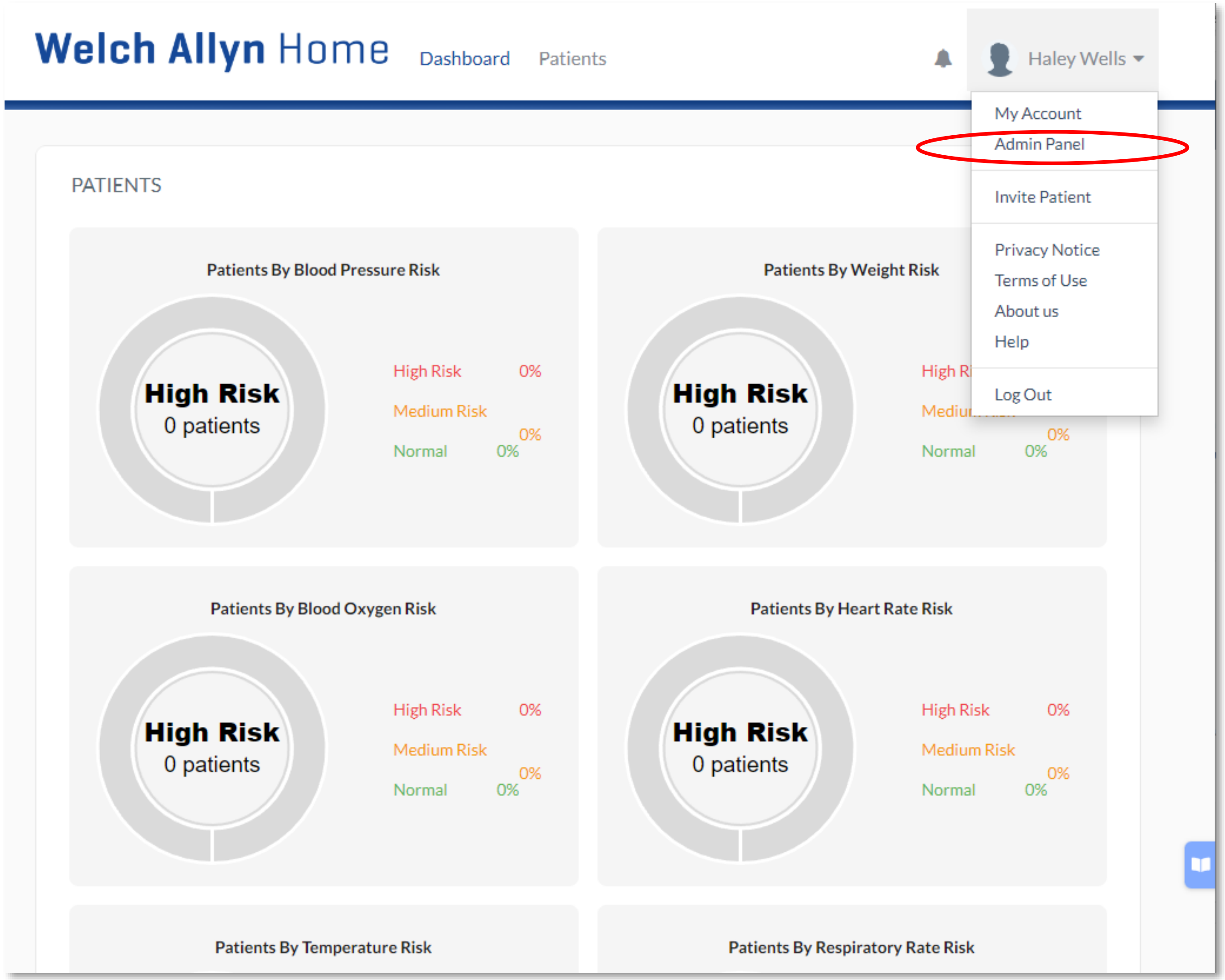
Under Consent to participate in surveys, click on the checkbox to uncheck and revoke your consent to participate in the surveys.

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.



Click name on the right side of the menu bar.

Click **Admin Panel**.

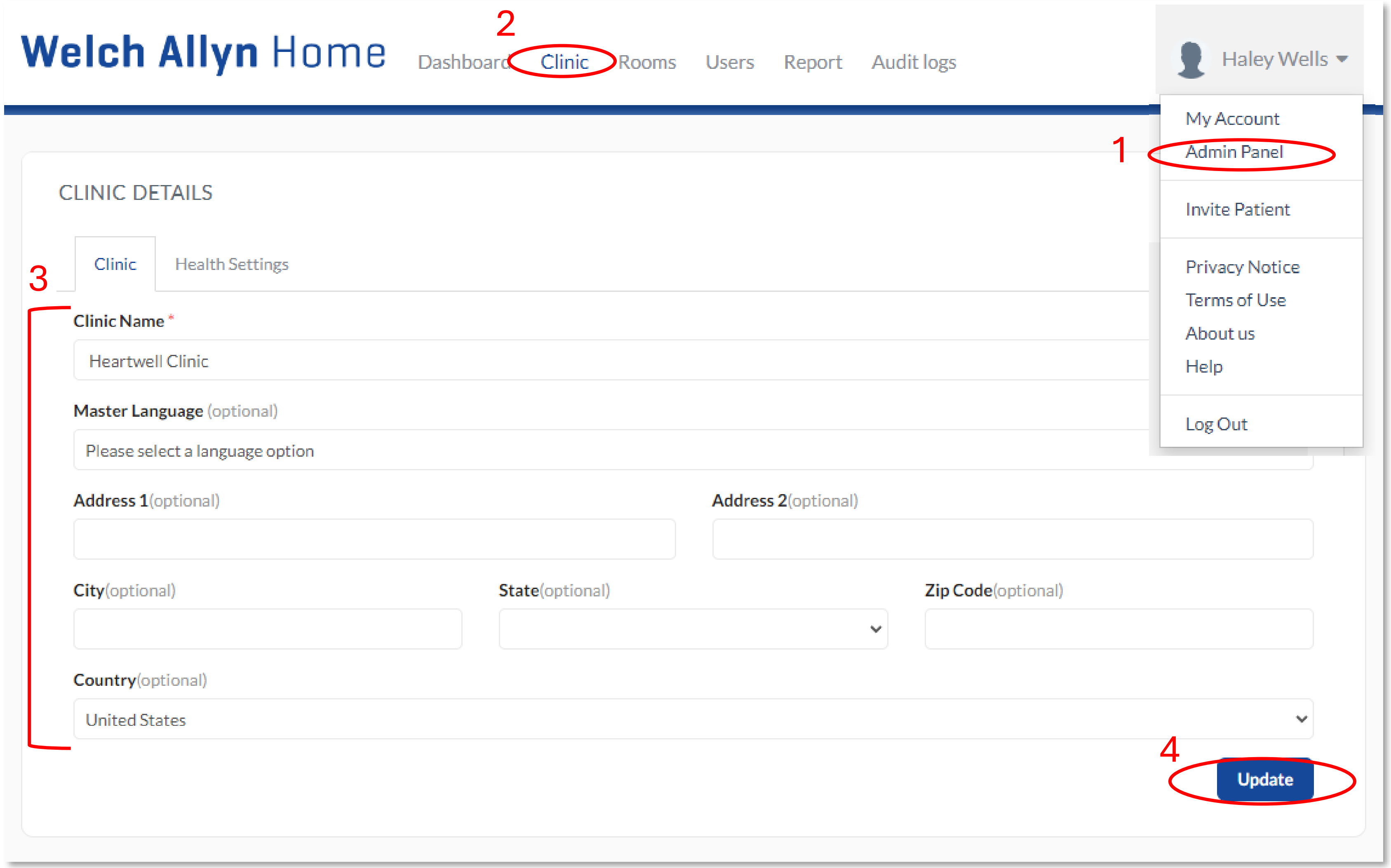
Reviewing and Updating Clinic Information

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**

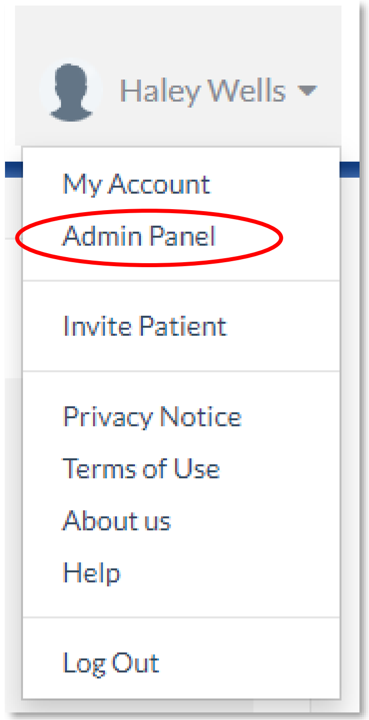


Setting Clinic-wide Patient Risk Ranges

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

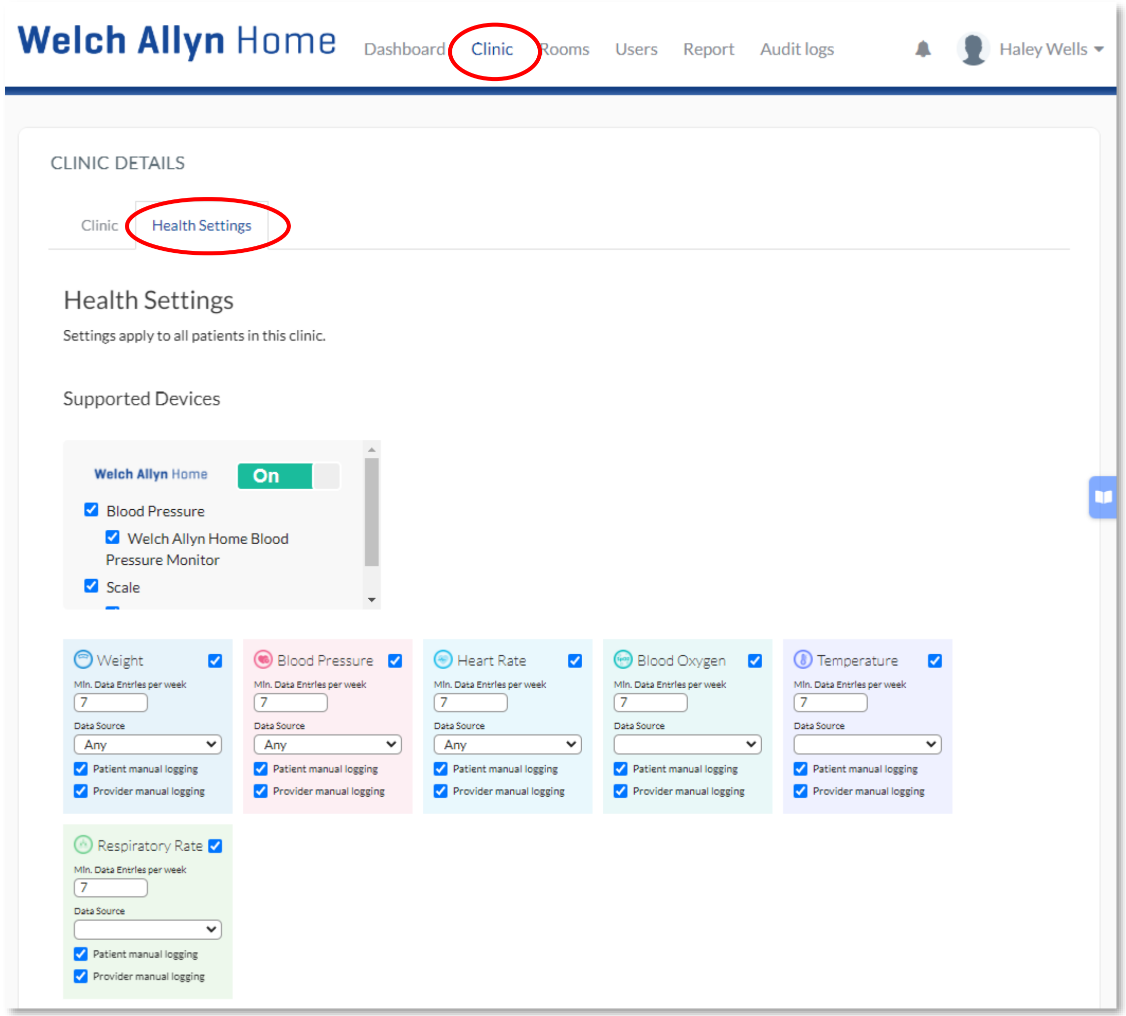
Risk range settings visualization will reflect on the health dashboard measurement chart and table of the Clinician/Provider, and the Patient's day view of the health dashboard in the Patient Portal.

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

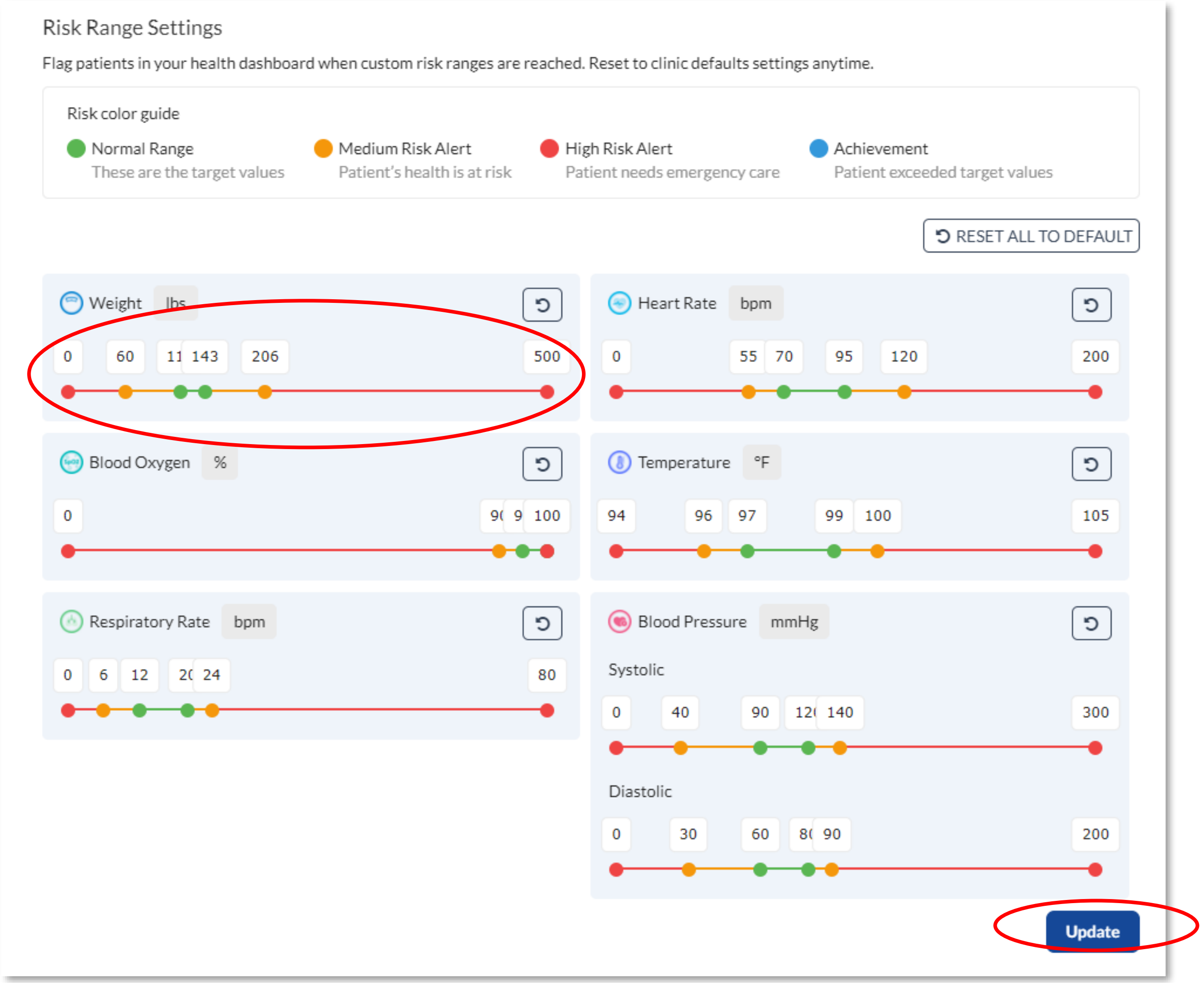
Click **Health Settings** under Clinic Details

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**

Welch Allyn Home

Creating Users

Role	Patient Health Data	Admin Panel
Clinic Administrator	Switch to Provider Dashboard	• 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	• 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	✓	• Users tab only – to perform administrative actions for patients • Role responsible for patient care and following patient progress.
Provider	✓	✗

Creating Users – cont'd

Functions	***Clinic administrator***	***System administrator***	***Clinician***	***Provider***
Clinic actions				
Edit clinic	X	X		
View clinic details	X	X		
Room actions				
Create room	X			
Edit and view room details	X	X		
Delete room	X			
Clone room	X			
Search for room	X	X		
Actions on System Administrators				
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

Functions	*Clinic administrator*	*System administrator*	*Clinician*	*Provider*
Actions on Clinicians and Providers				
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		
Actions on Patients				
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

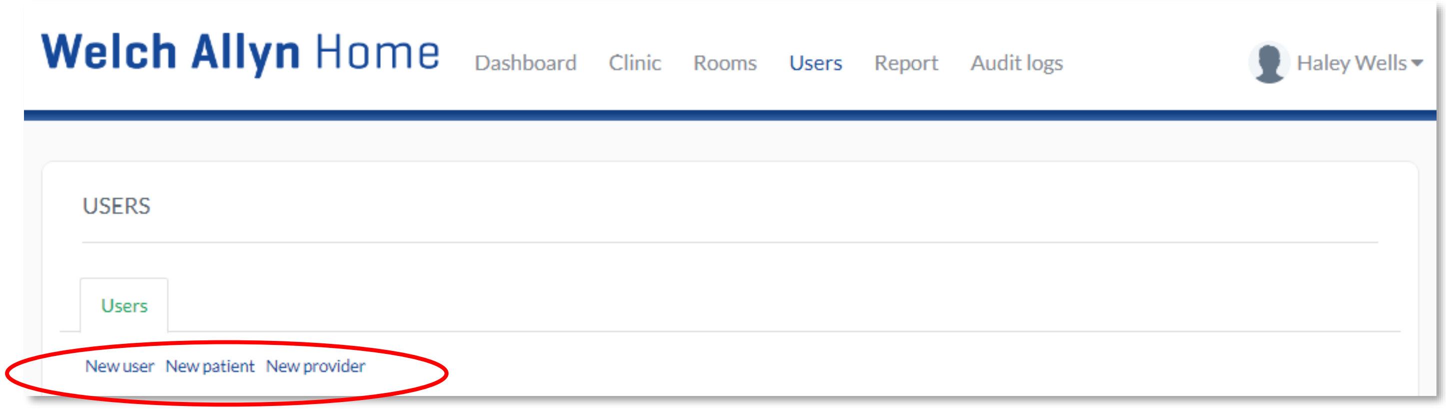
Functions	*Clinic administrator*	*System administrator*	*Clinician*	*Provider*
Actions on health data			X	X
Manually enter health data			X	X
Edit and delete health data that was added manually			X	X
Manage clinic risk range settings	X	X		
Manage provider risk range settings			X	X
Manage custom patient 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.



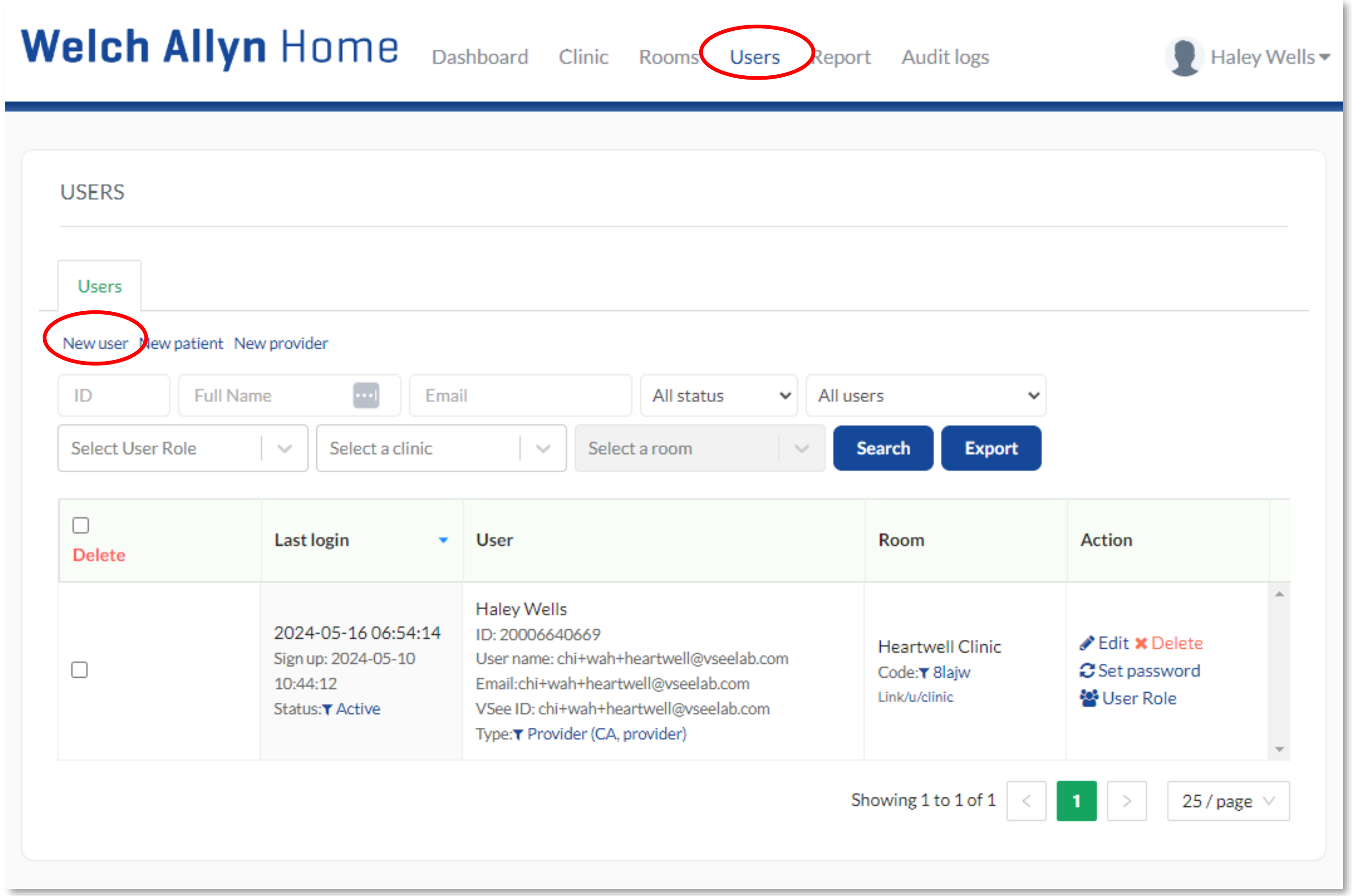
Creating Users – System Users

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**

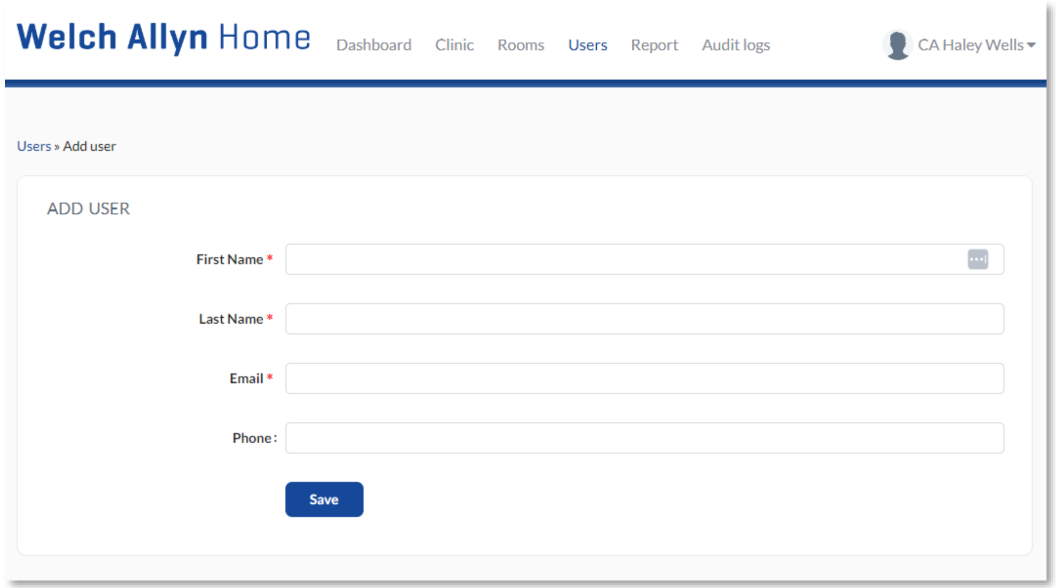


Click Users from the Menu tab

Click **New User**

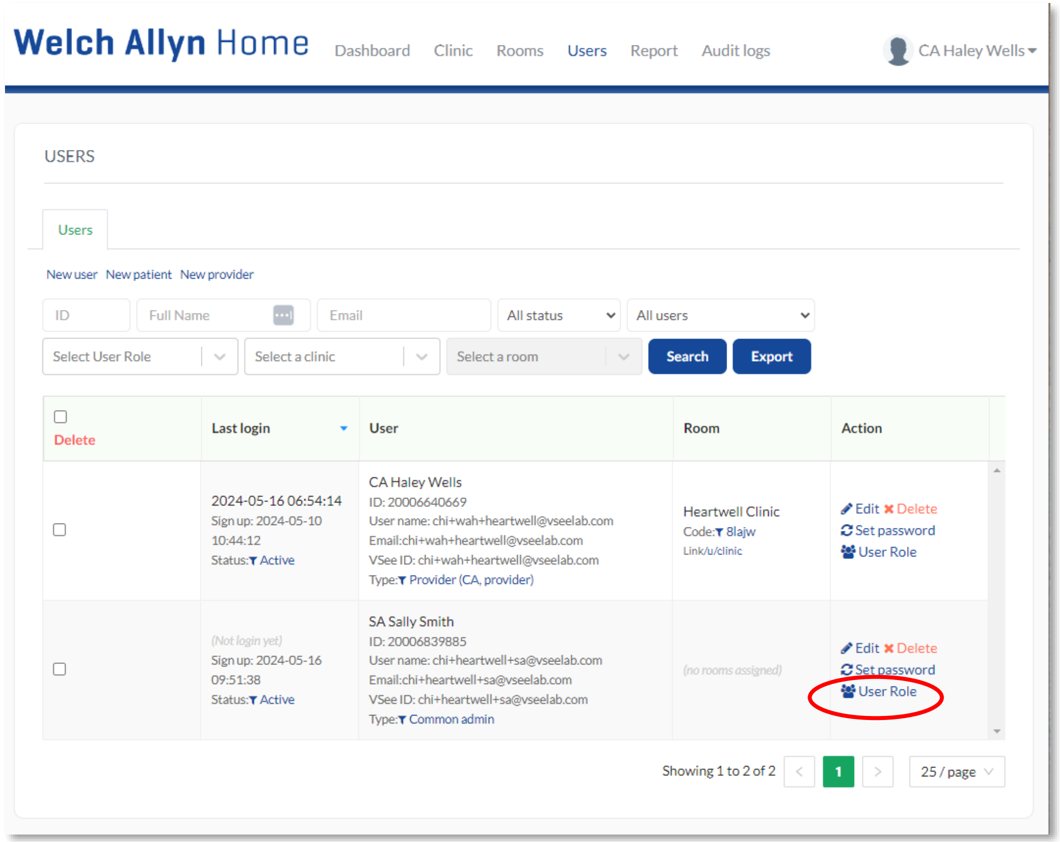
>

Creating Users – System Users (cont'd)



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

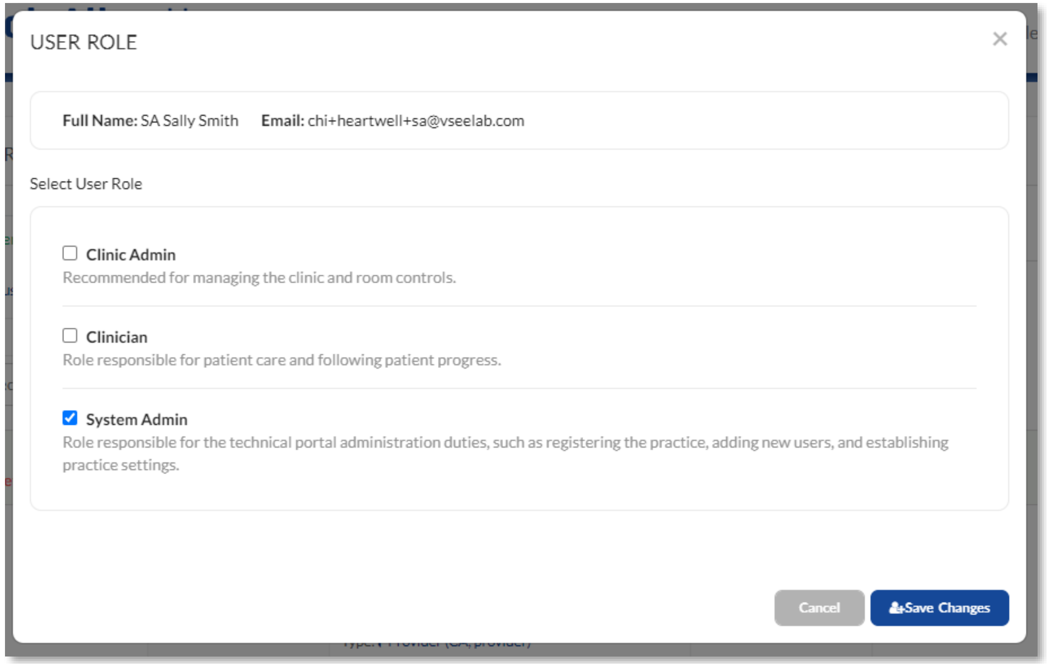
Click **Save**



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.

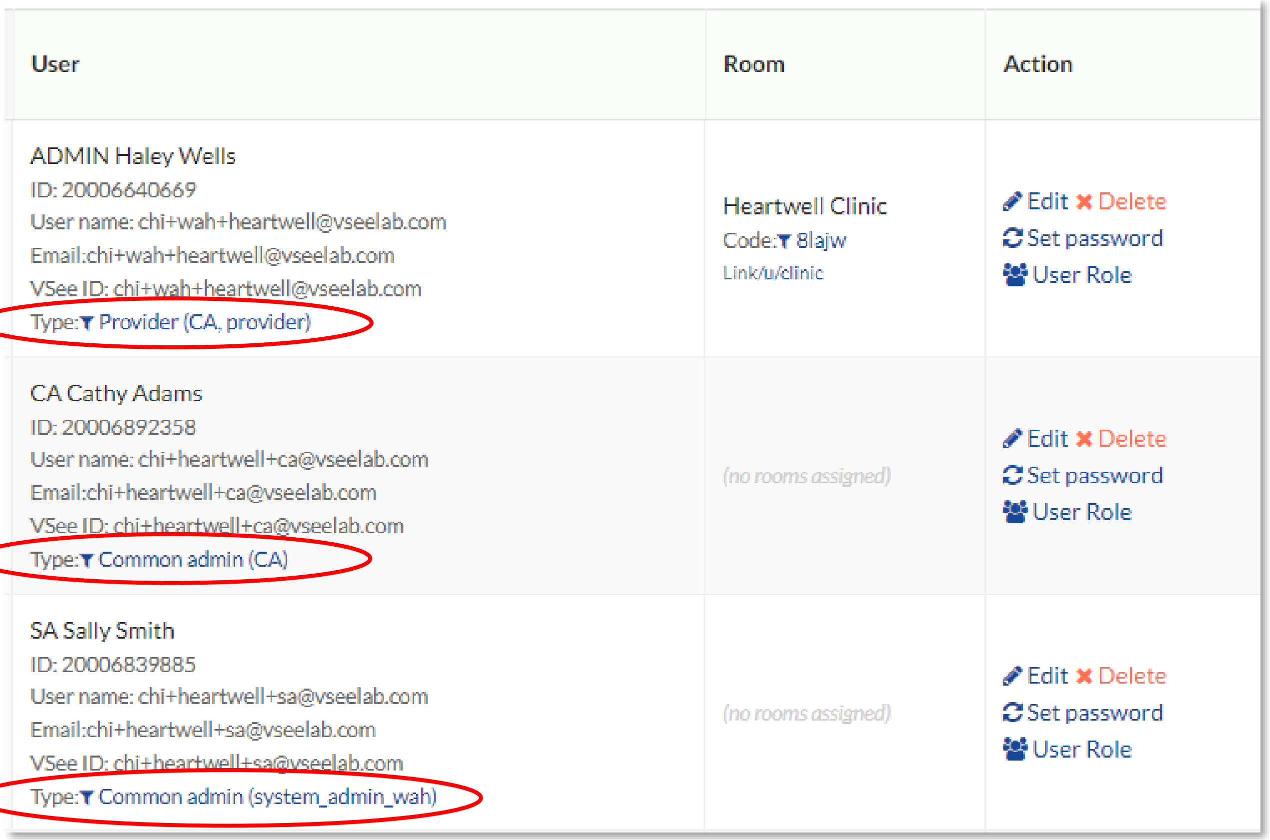
Find the new user in the list and click **User Role** in the Action column.

Creating Users – System Users (cont'd)



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.

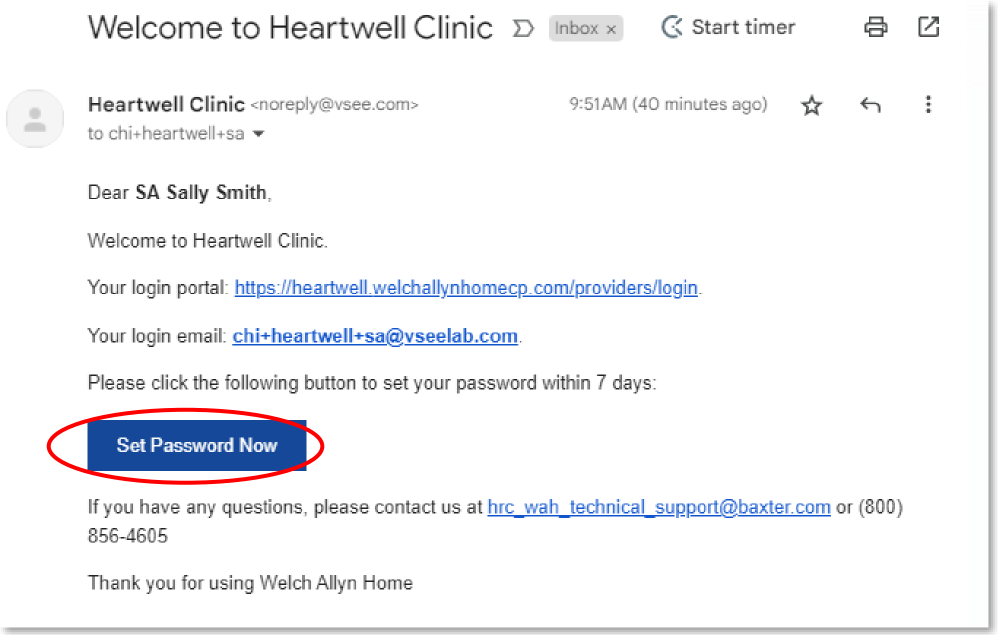


User	Room	Action
ADMIN Haley Wells ID: 20006640669 User name: chi+wah+heartwell@vseelab.com Email:chi+wah+heartwell@vseelab.com VSee ID: chi+wah+heartwell@vseelab.com Type: Provider (CA, provider)	Heartwell Clinic Code: 8lajw Link/u/clinic	Edit Delete Set password User Role
CA Cathy Adams ID: 20006892358 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

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

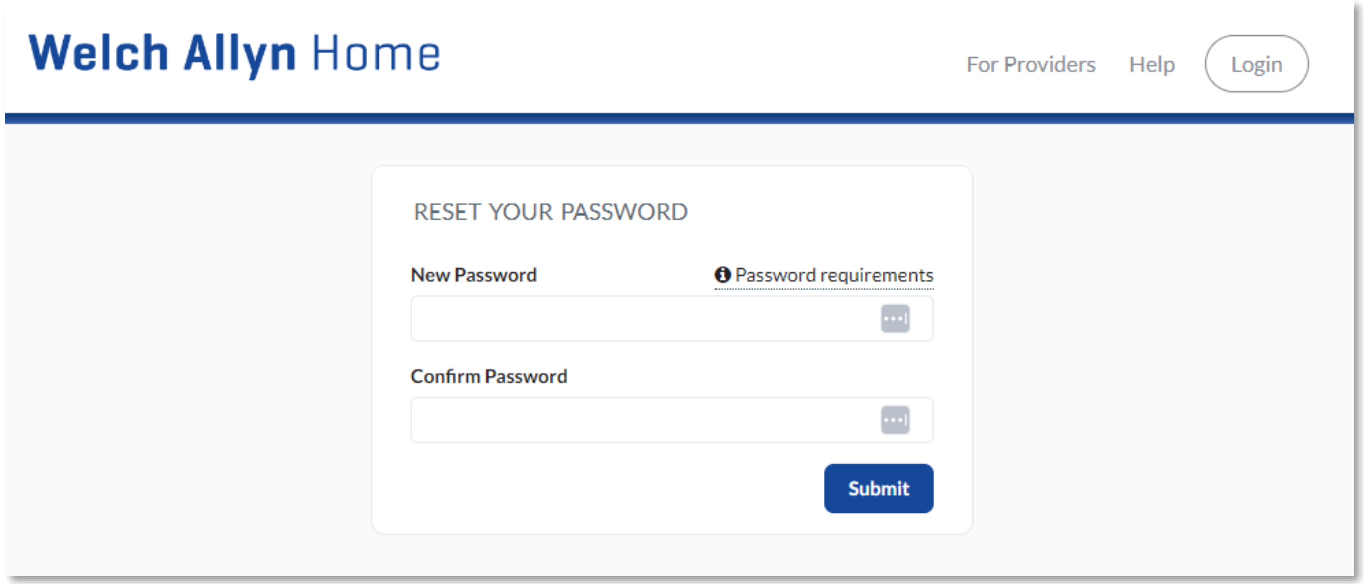
Creating Users – System Users (cont'd)

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**

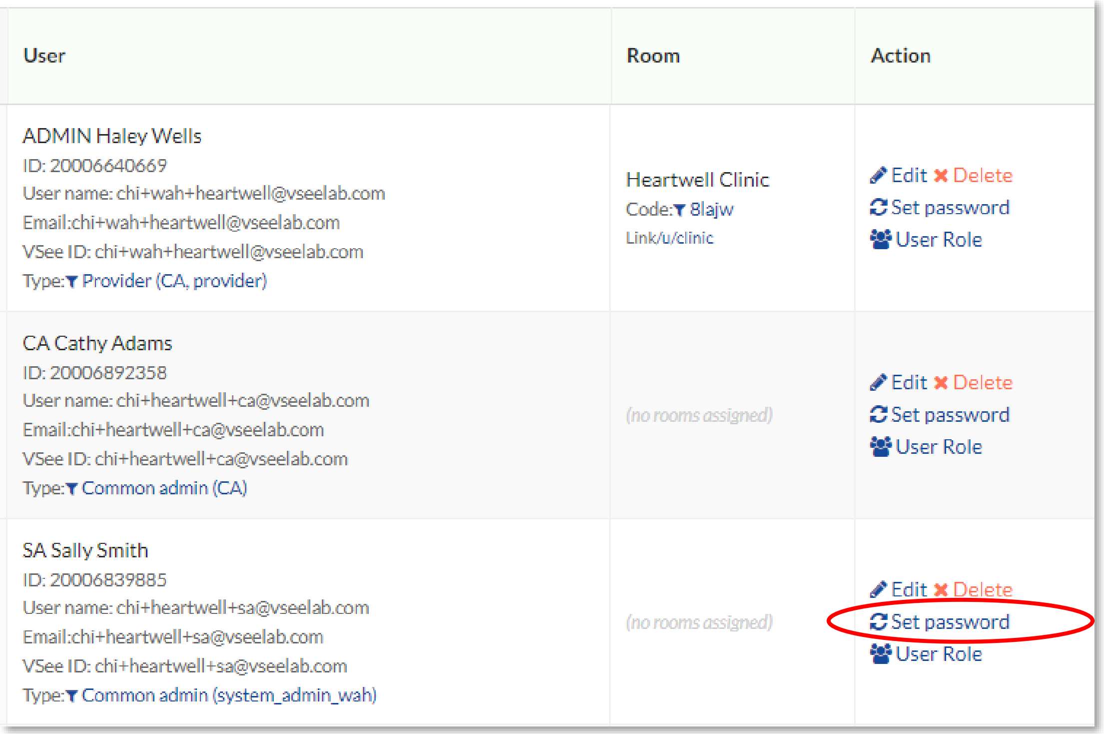


Enter the new password and retype to confirm the password

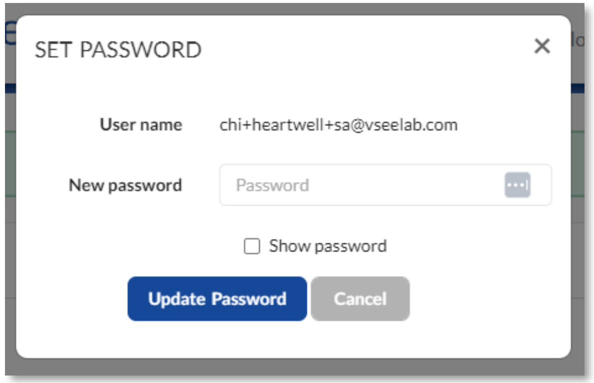
Click Submit

Creating Users – System Users (cont'd)

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



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**.

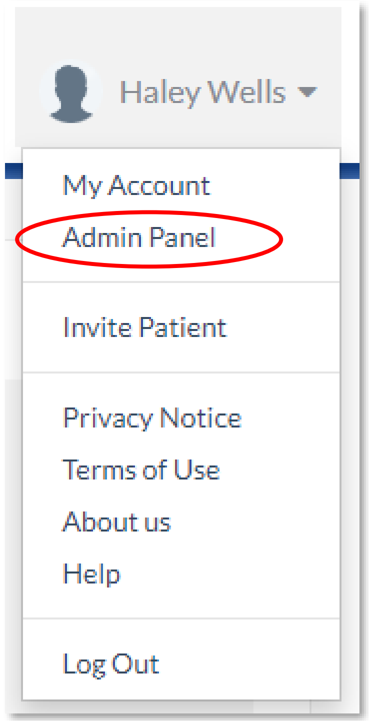
Instruct the user to check their email and log in to the clinical portal using the temporary password created for them. They can edit their user information as needed after logging in.

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.

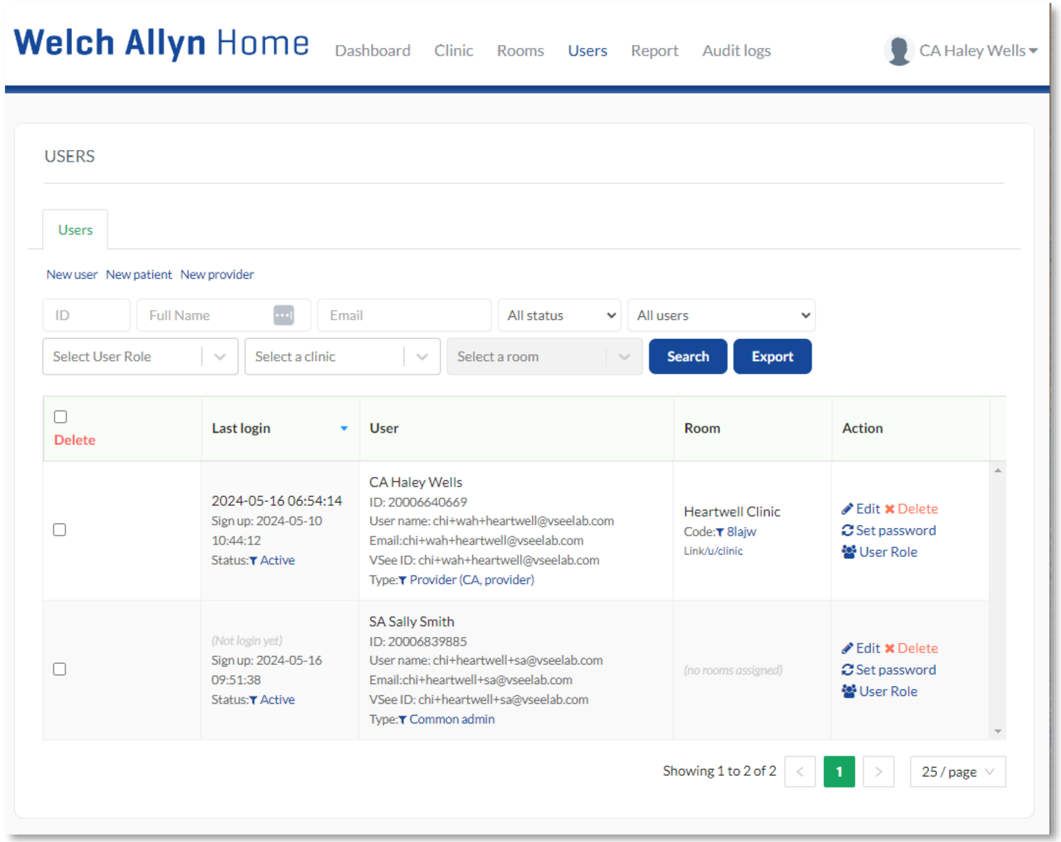
Patients would be able to access their health records through the Welch Allyn Home app and the Patient Portal.

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



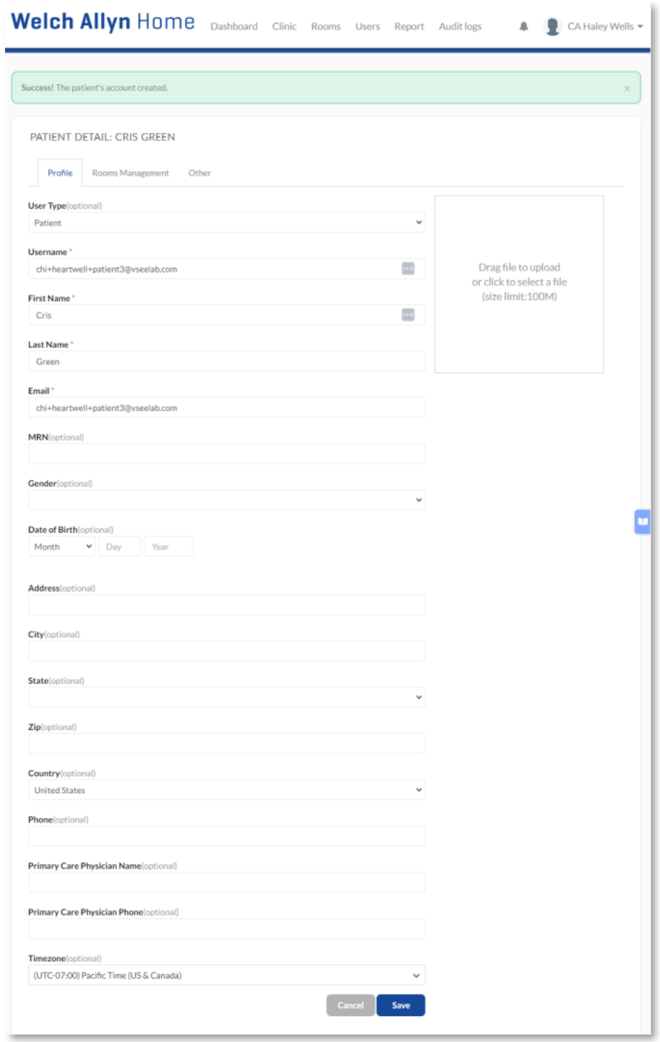
Click name on the right side of the menu bar.

Click **Admin Panel**.



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

Creating Users – Patients (cont'd)

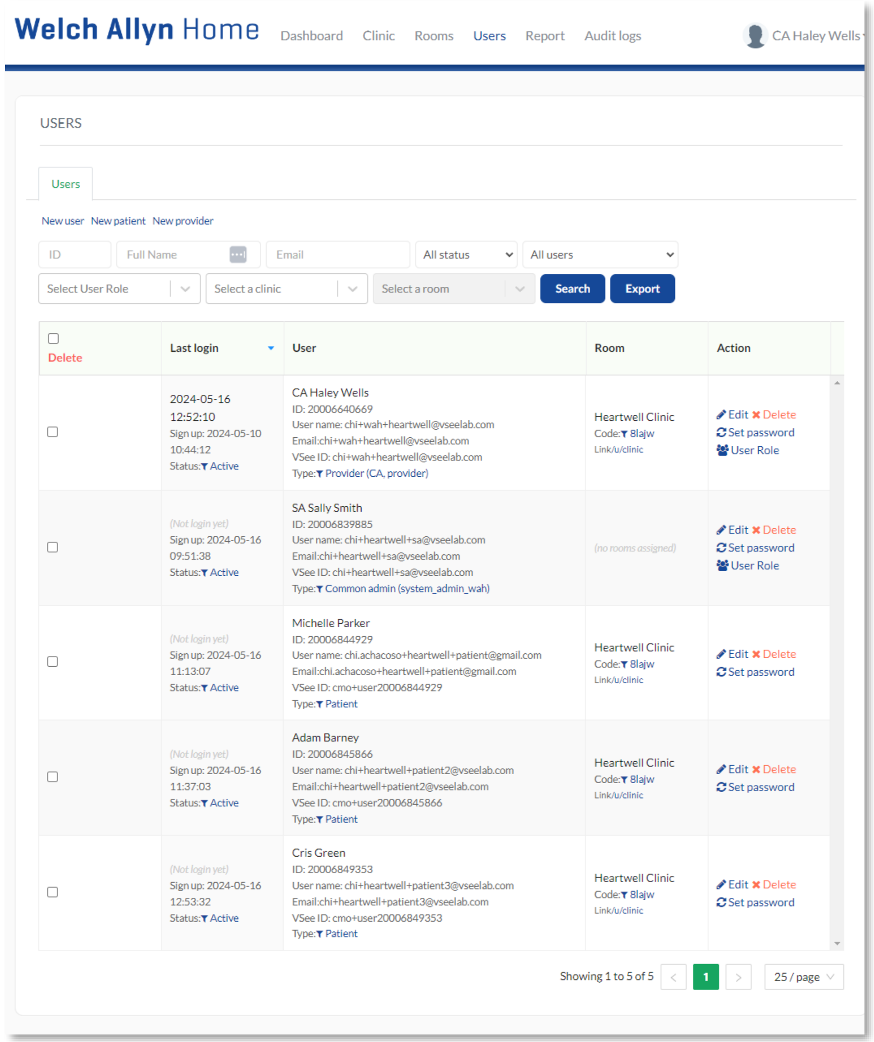


Complete the Clinic, Rooms, Username (use their Email address), First Name, Last Name, Email, and any other optional information.

Then click on **Create**.

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

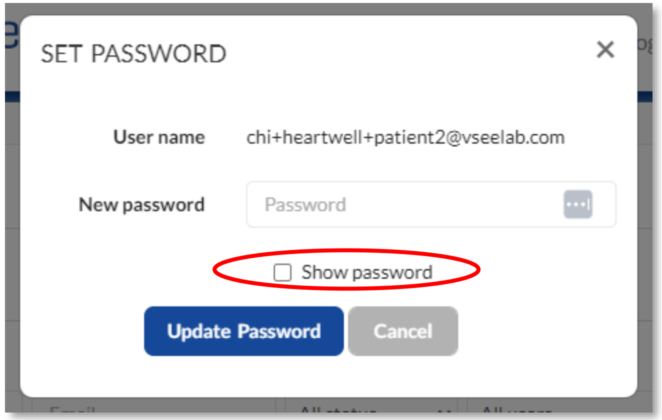
Enter any other optional information and click on **Save**.



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.

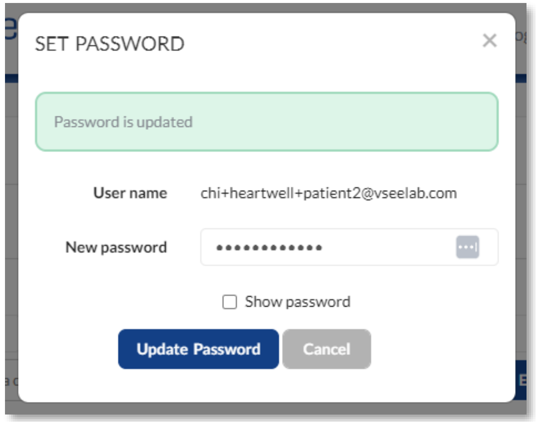
Creating Users – Patients (cont'd)



Enter a temporary password in the New password field,

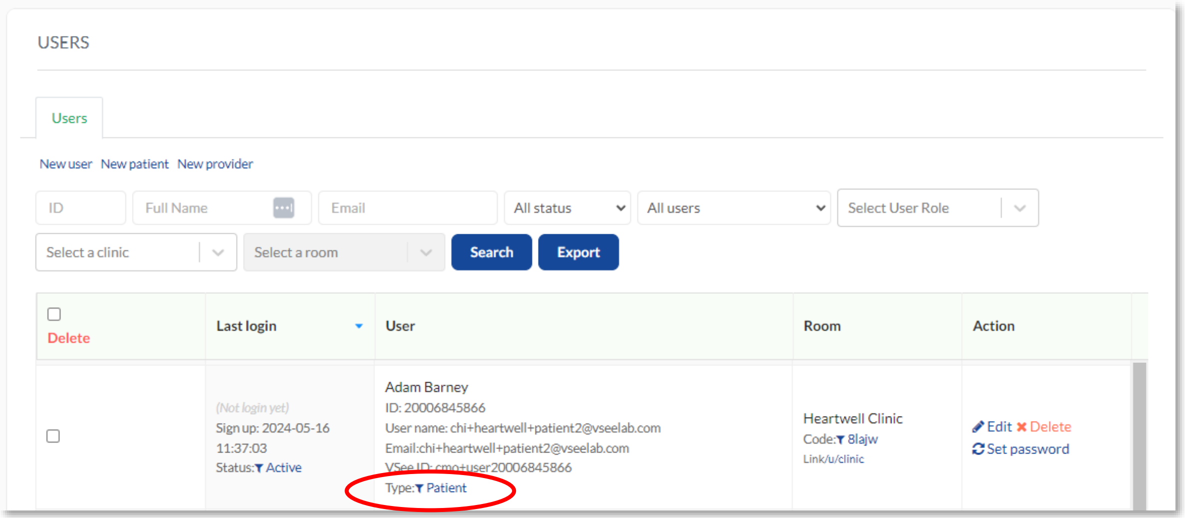
Check the box next to Show password (so you can visually confirm and note what the password is)

Click **Update Password**.



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

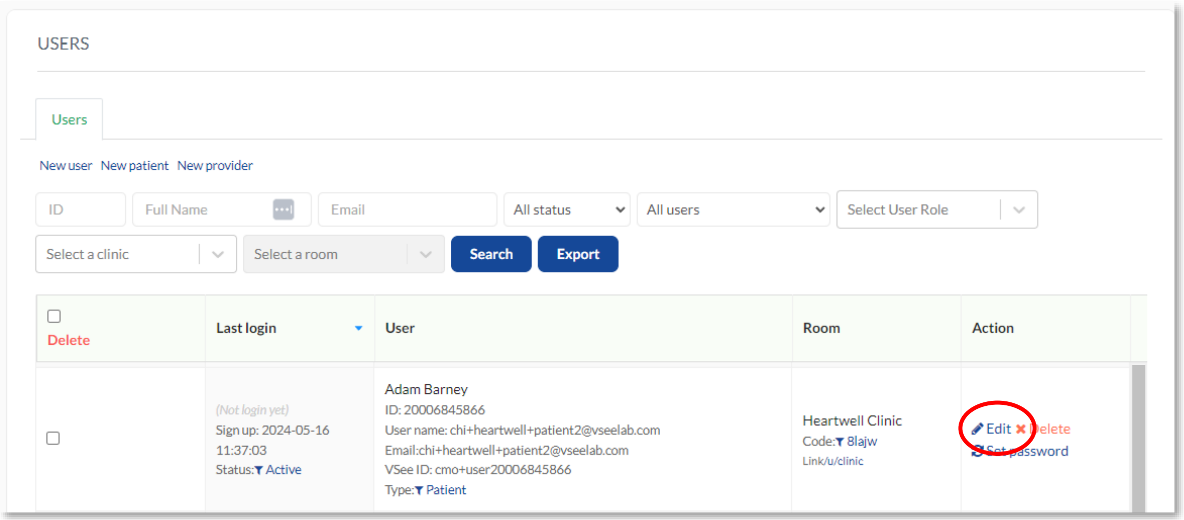
Share the new patient user information and temporary password with the clinician/ provider who will invite the new patient to join.



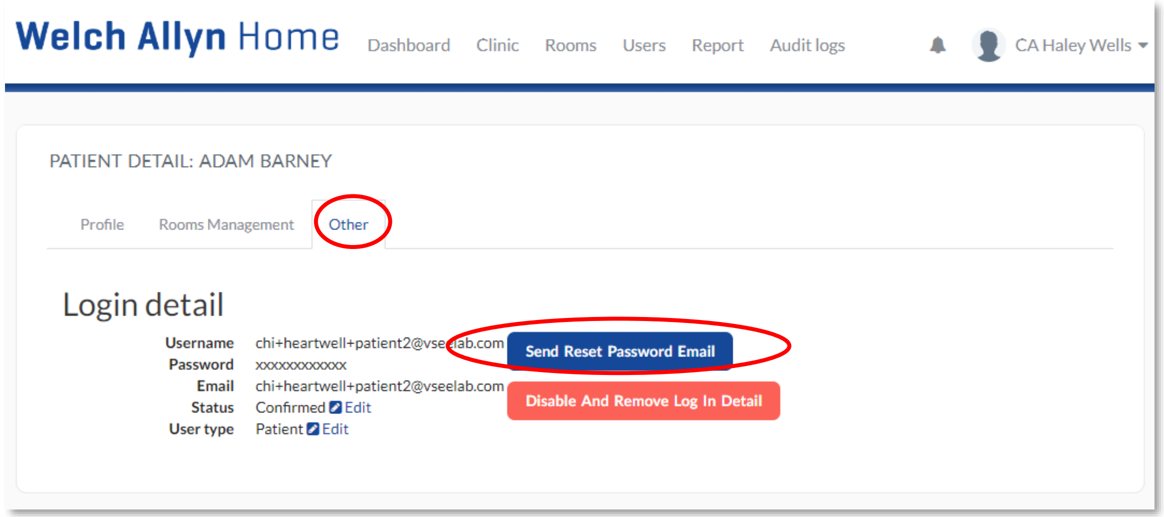
The user type will show as "Patient" in the list of users table

Creating Users – Patients (cont'd)

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



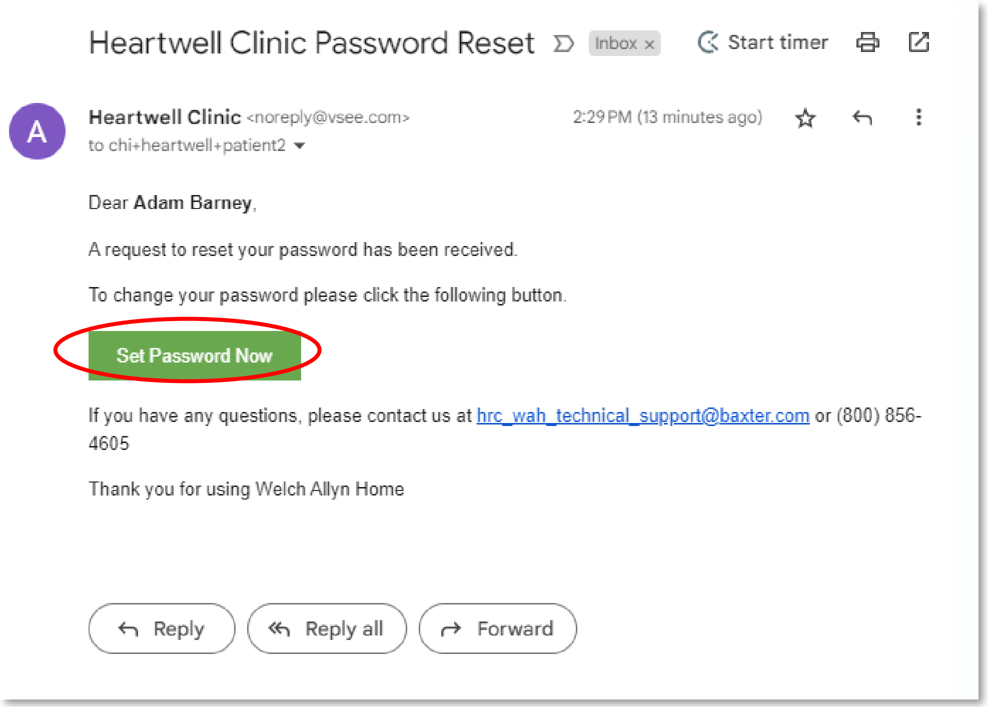
Click **Edit** on the Action column of the Patient to whom the reset password email will be sent



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

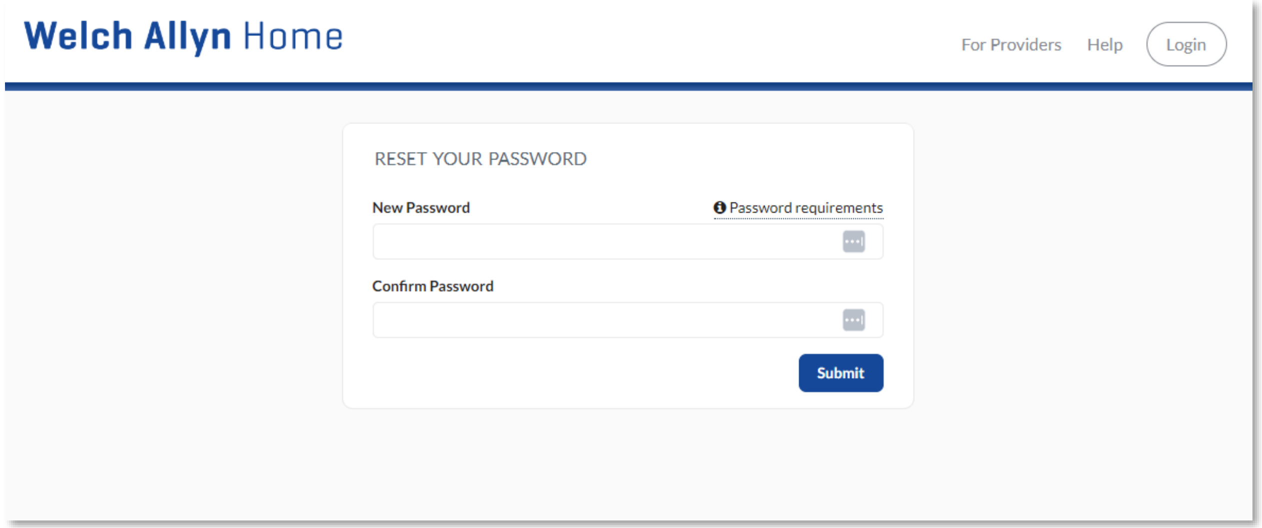
Click **Send Reset Password Email**

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**

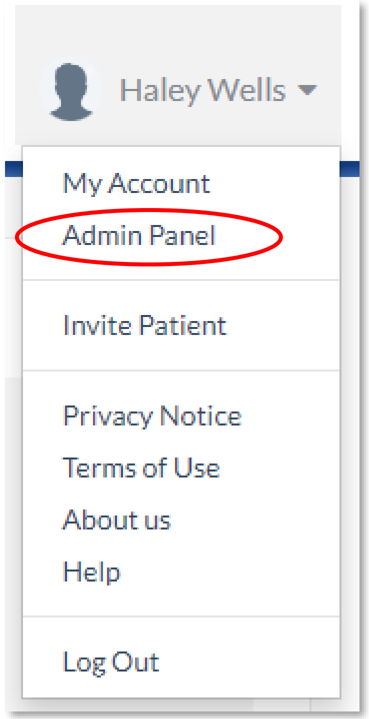
Creating Users – Clinician/ Providers

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:

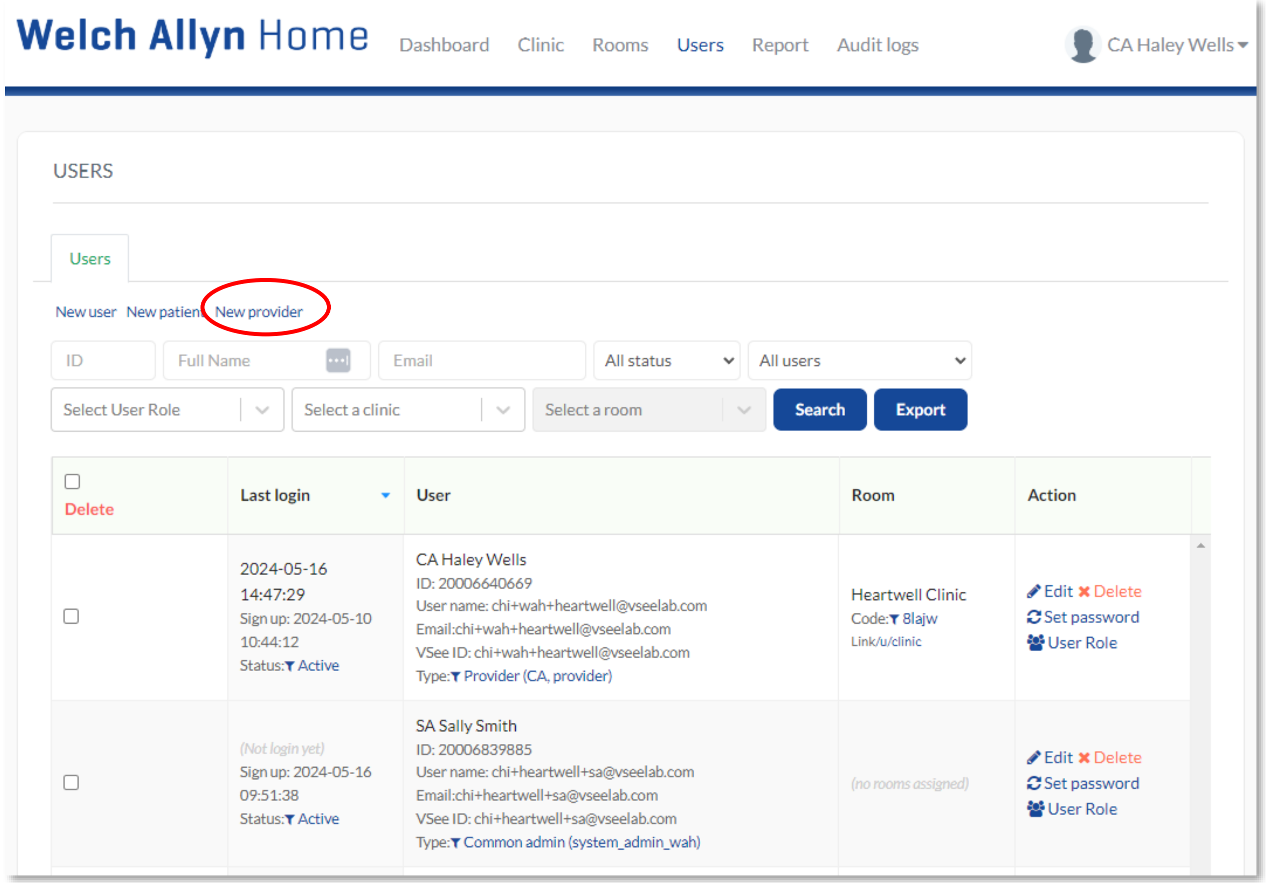
- Create patient
- Delete patient
- Suspend/ Confirm patient
- Set Patient password

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**.

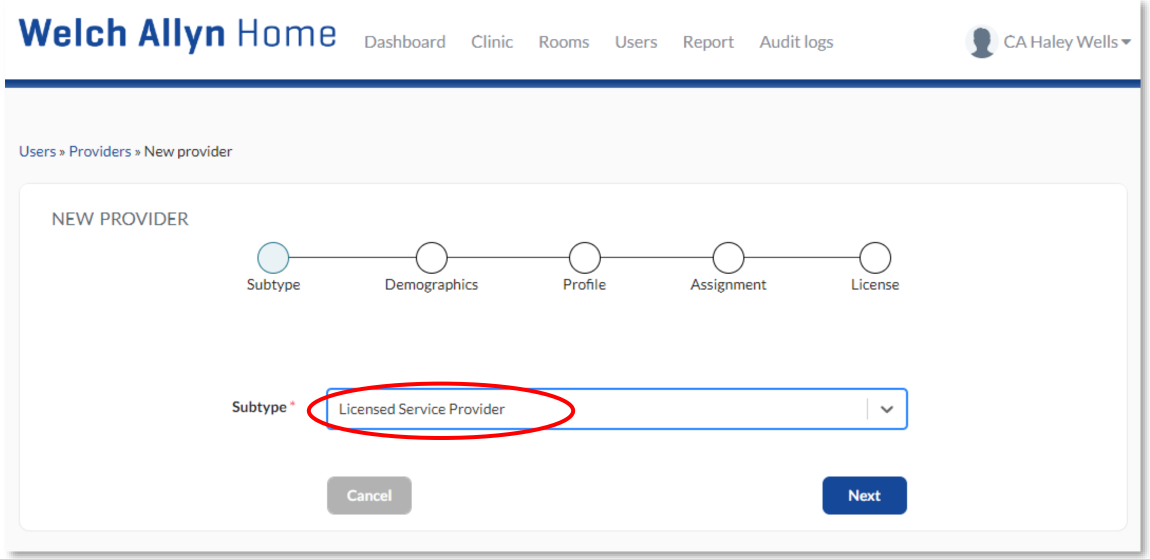


On the menu bar, click **Users**

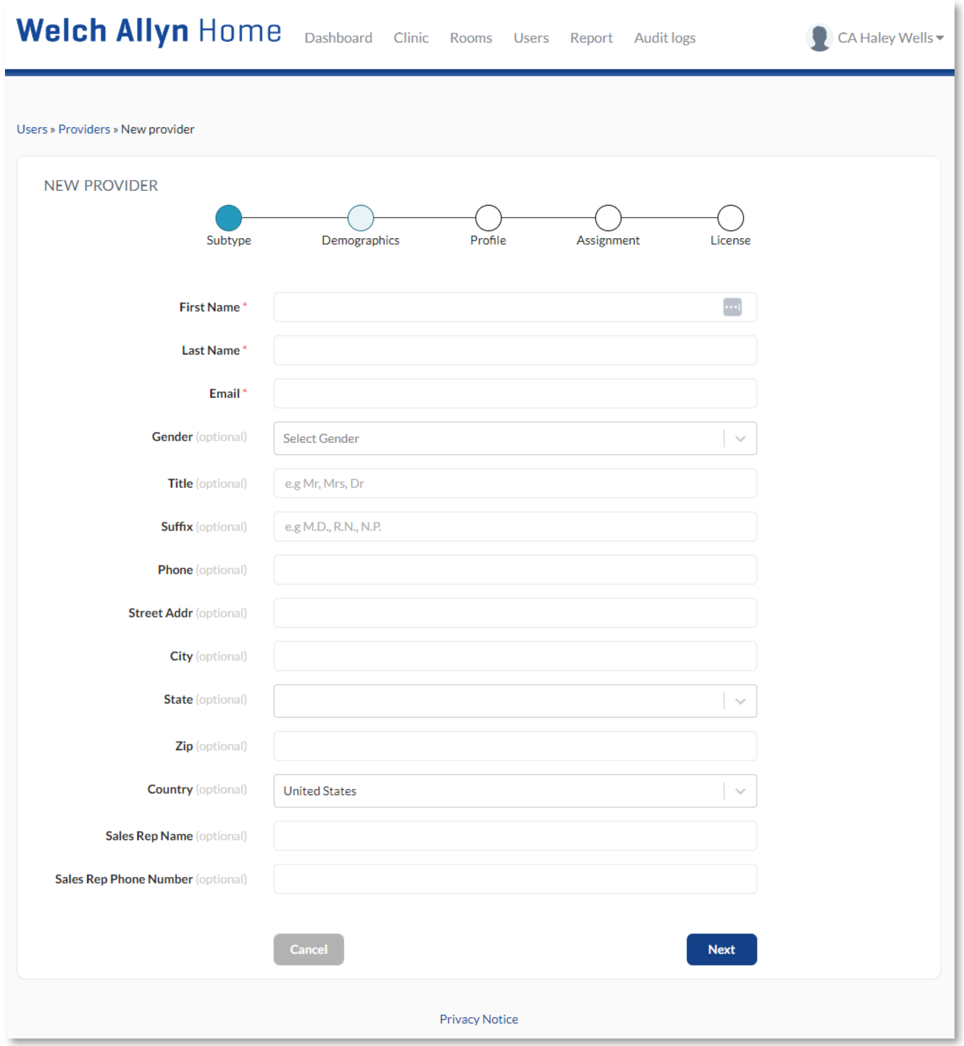
Click **New provider**.

The NEW PROVIDER screen appears.

Creating Users – Clinician/ Providers – cont'd



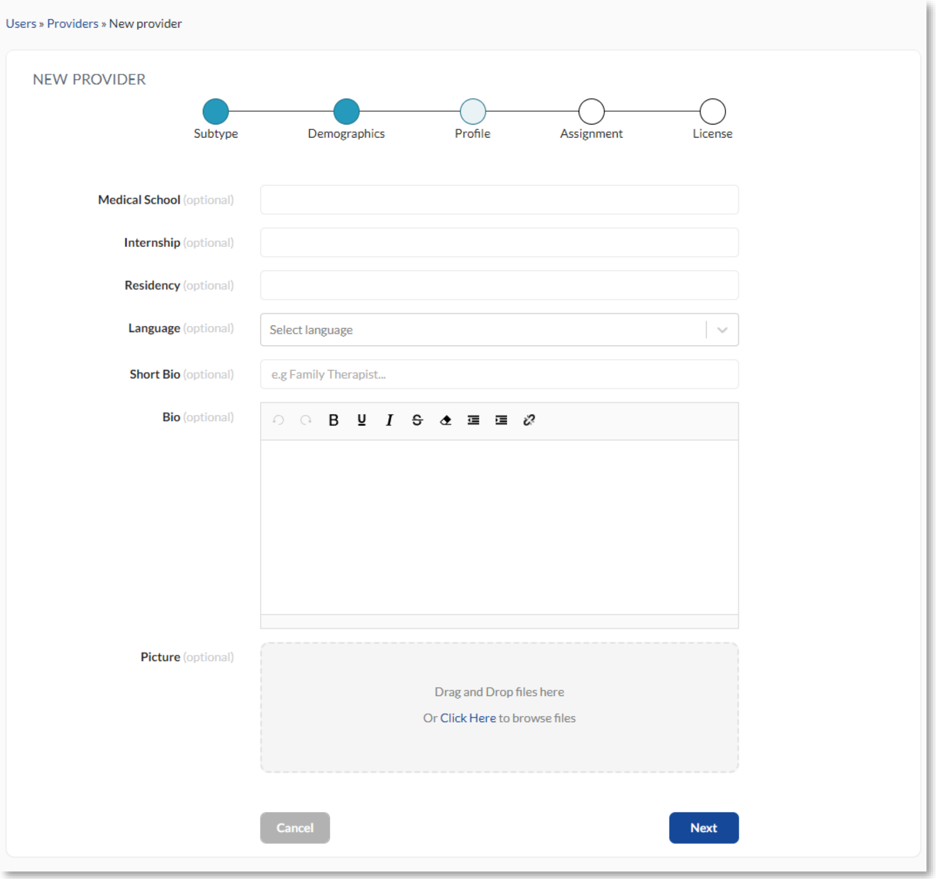
Select the clinician's provider type from the Subtype dropdown and click **Next**.



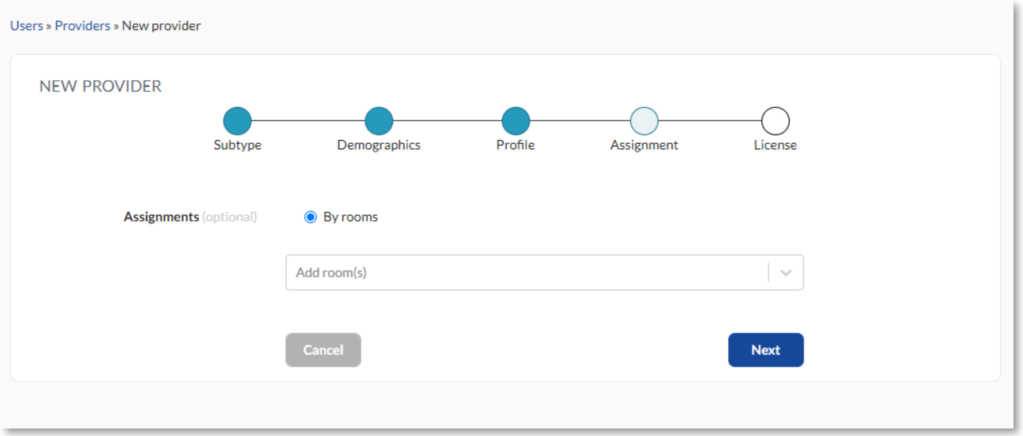
Complete the First Name, Last Name, Email, and any other optional demographic information.

Click **Next**.

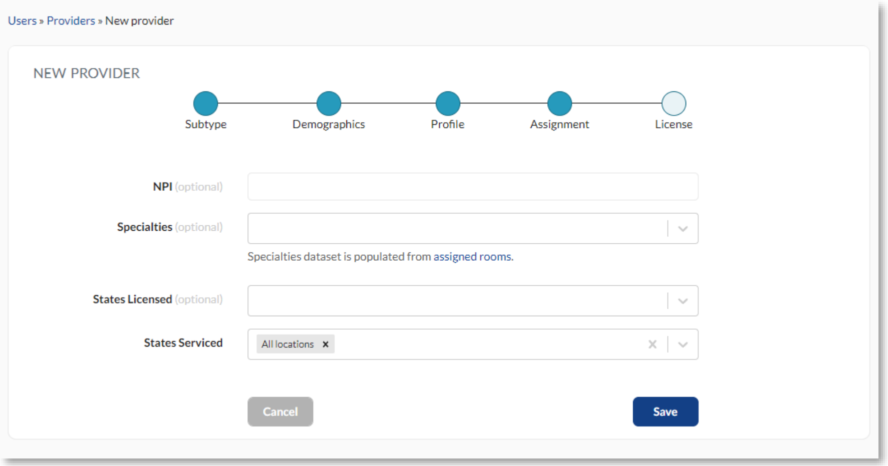
Creating Users – Clinician/ Providers (cont'd)



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

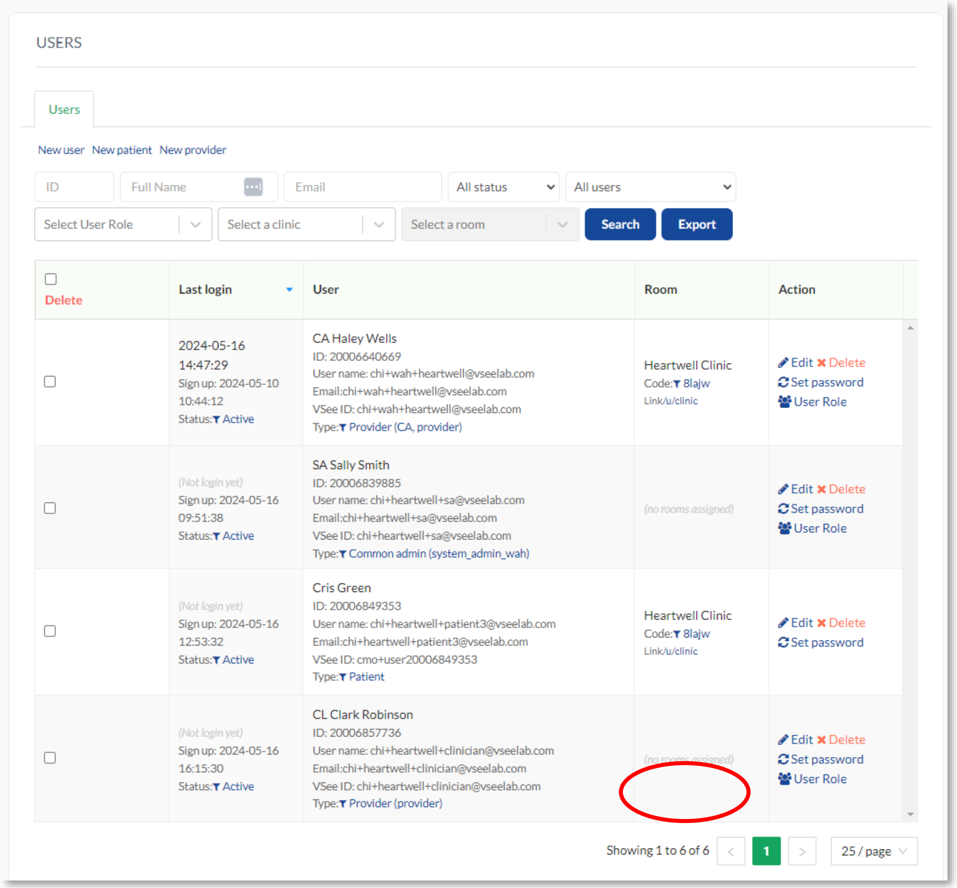


Enter the room assignment (optional) and then select **Next**.
Note: Only users added to a room would show in the Clinic Report

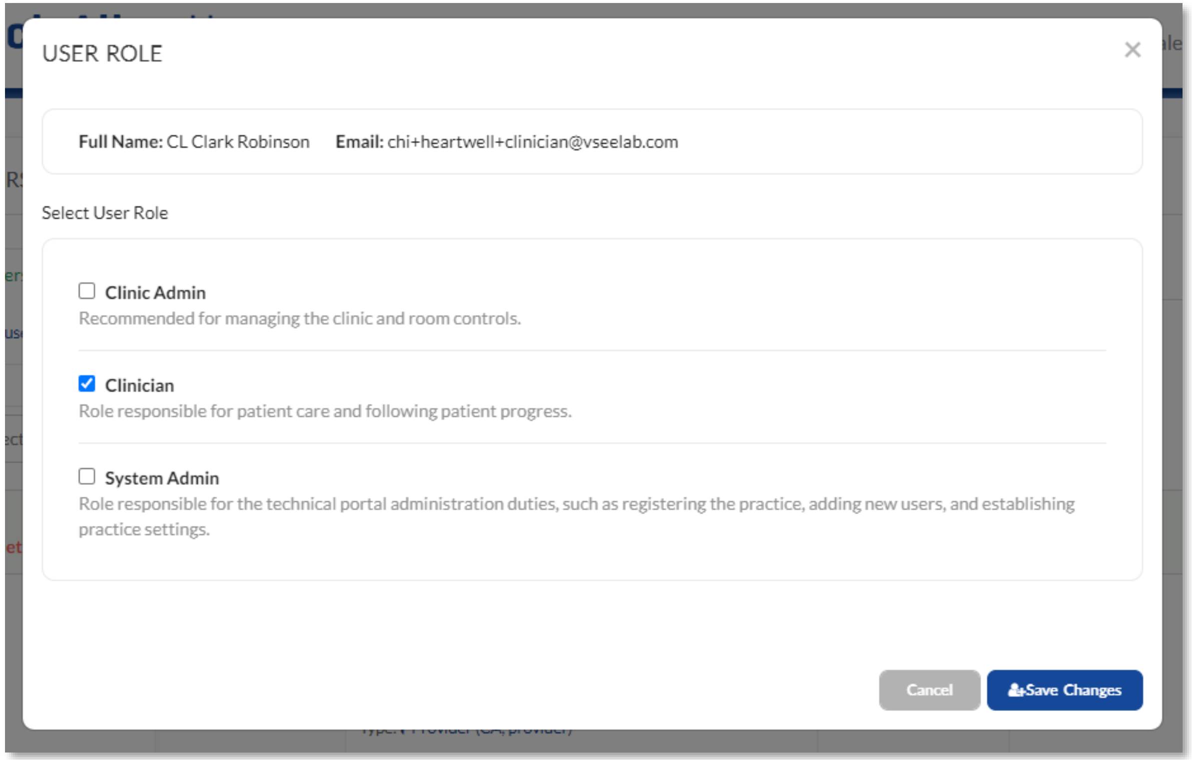


Enter license information (optional) and then select **Next**.
The overall list of users displays.

Creating Users – Clinician/ Providers (cont'd)



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.

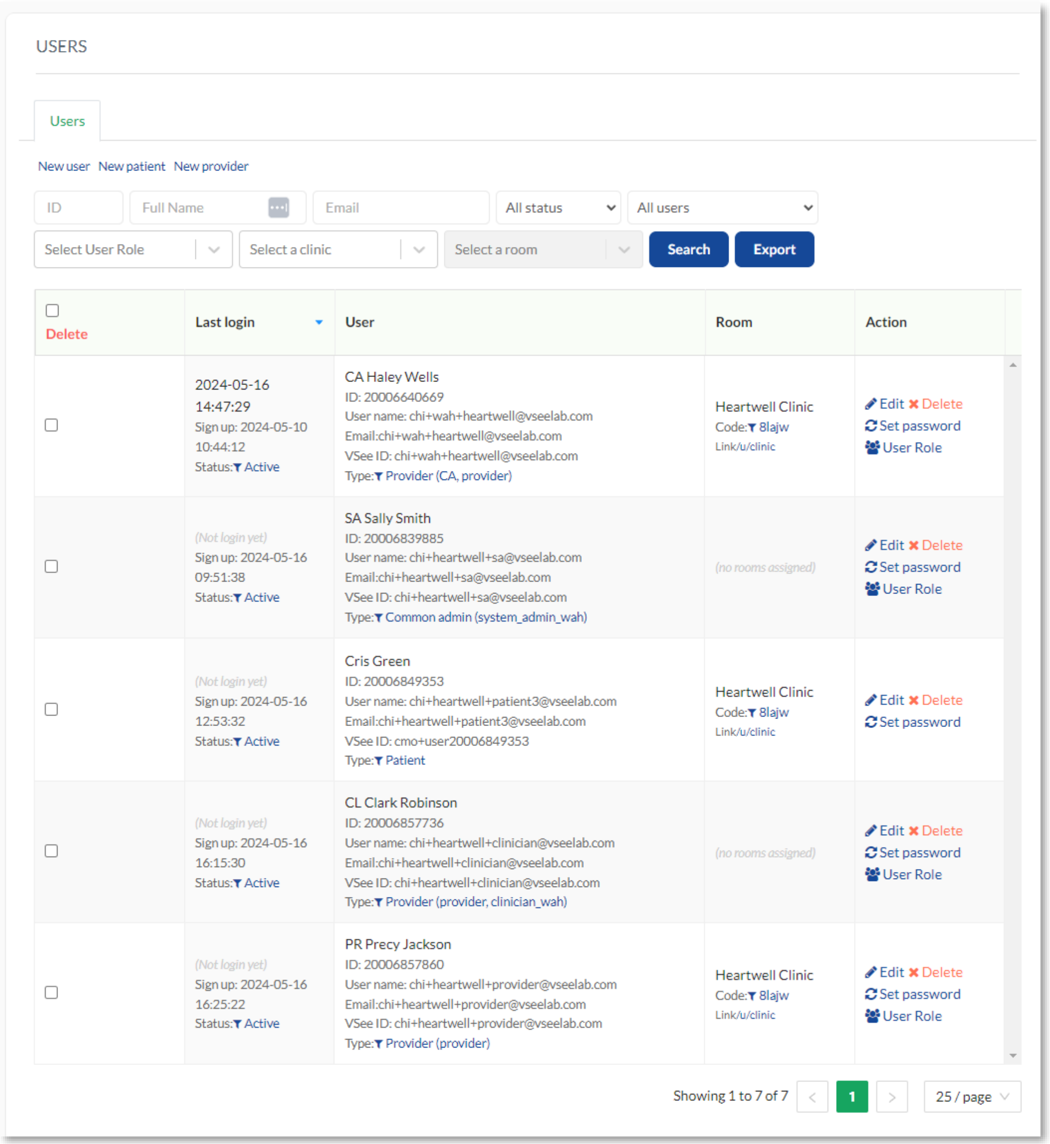


In the resulting USER ROLE popup, check the box next to Clinician and click on **Save Changes**. A message appears to let you know the user was updated.

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.

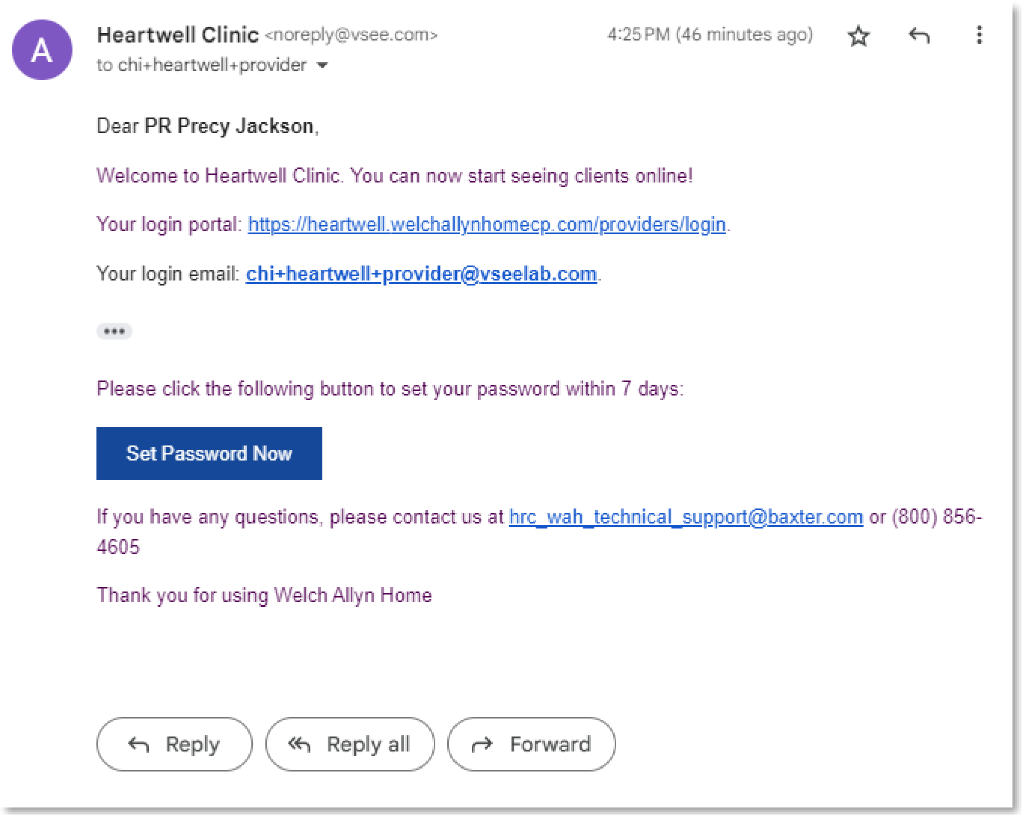
Instruct the user to check their email for instructions to login and set their password. They can edit their user information as needed after logging in.



>

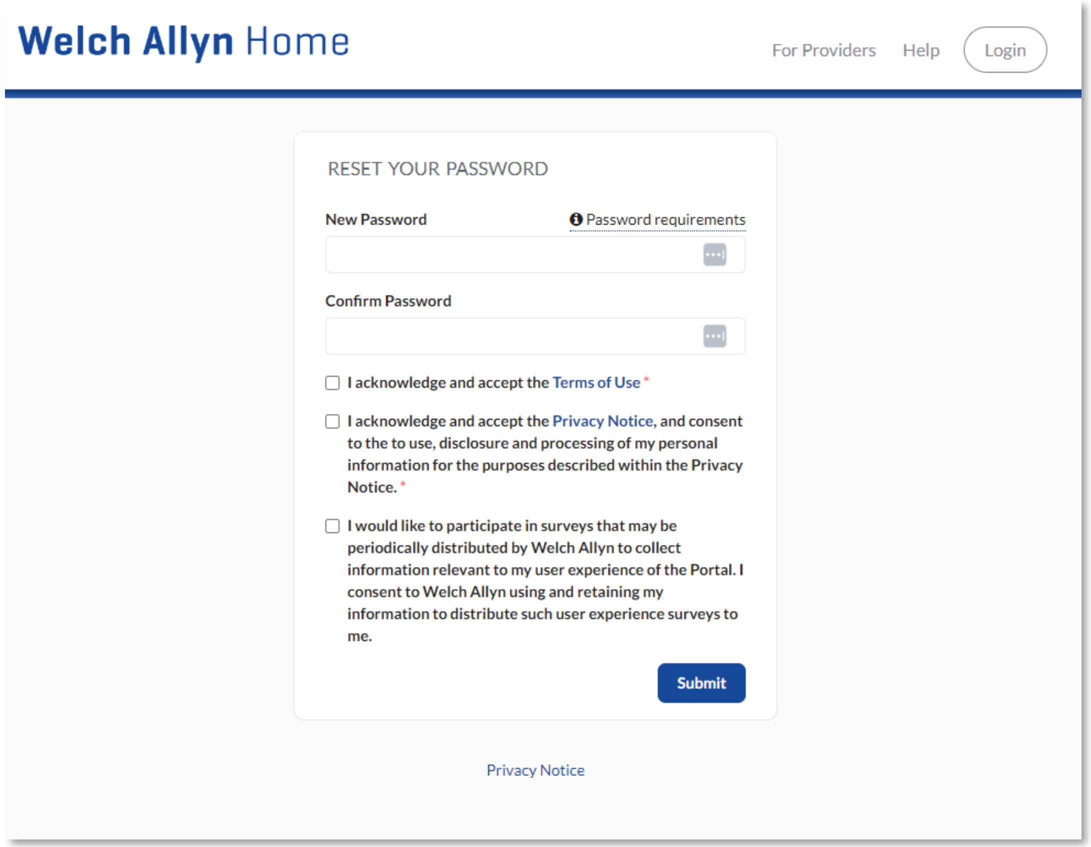
Welch Allyn Home

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**



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

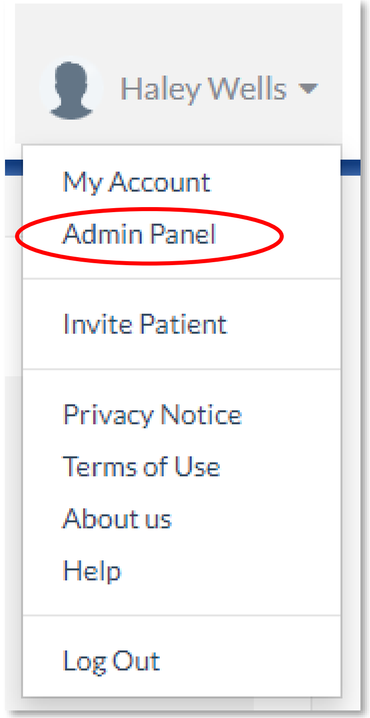
Review the Terms and Conditions and click the boxes to agree with the Terms of Services and Survey Participation

Click **Submit**

Editing Users - Information

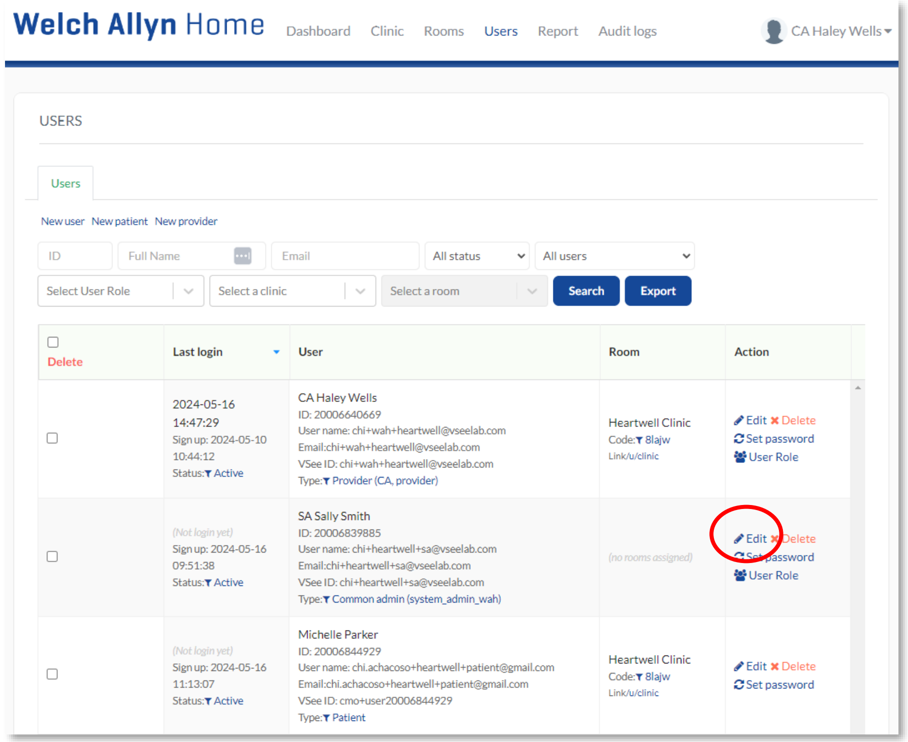
An administrator, System user and Clinician can edit user accounts when needed.

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



Click name on the right side of the menu bar.

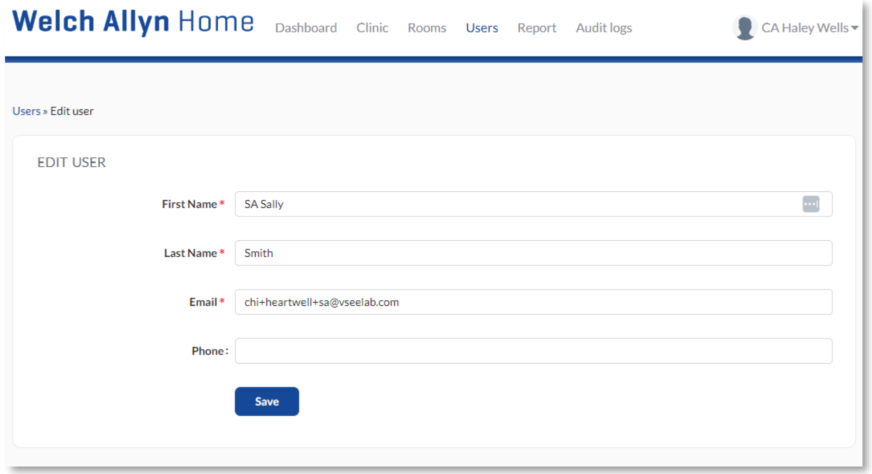
Click **Admin Panel**.



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.



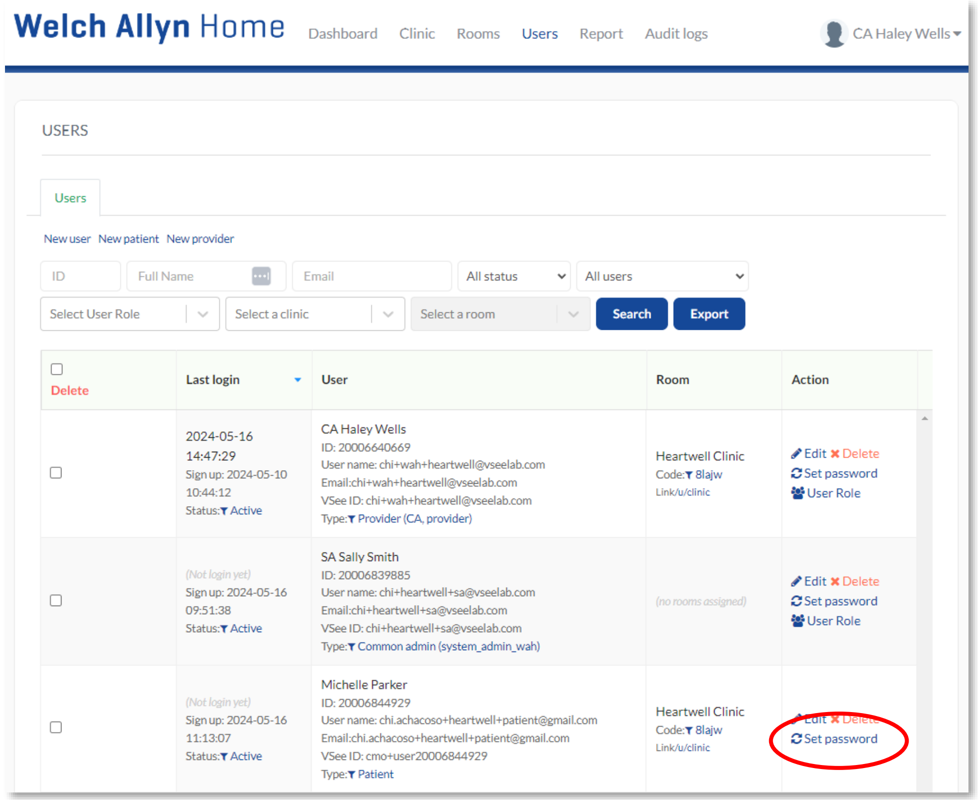
Update the user's information

Click on **Save** when done.

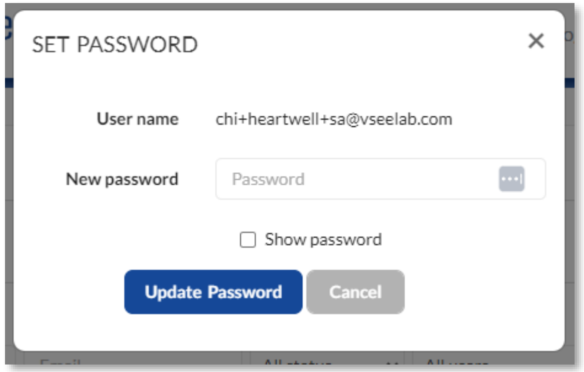
Editing Users - Setting a Password

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**

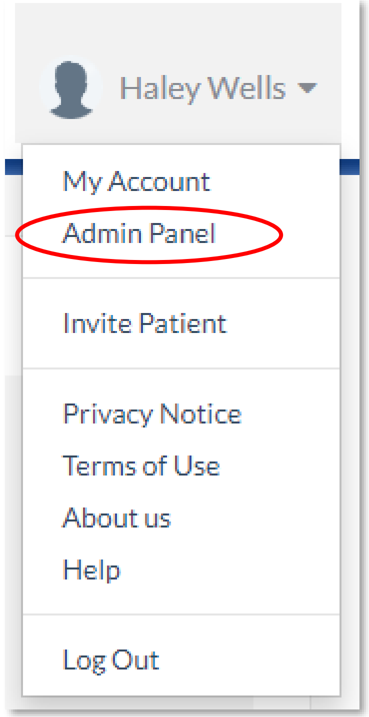


Set a password that meets the requirements

Click **Update Password**

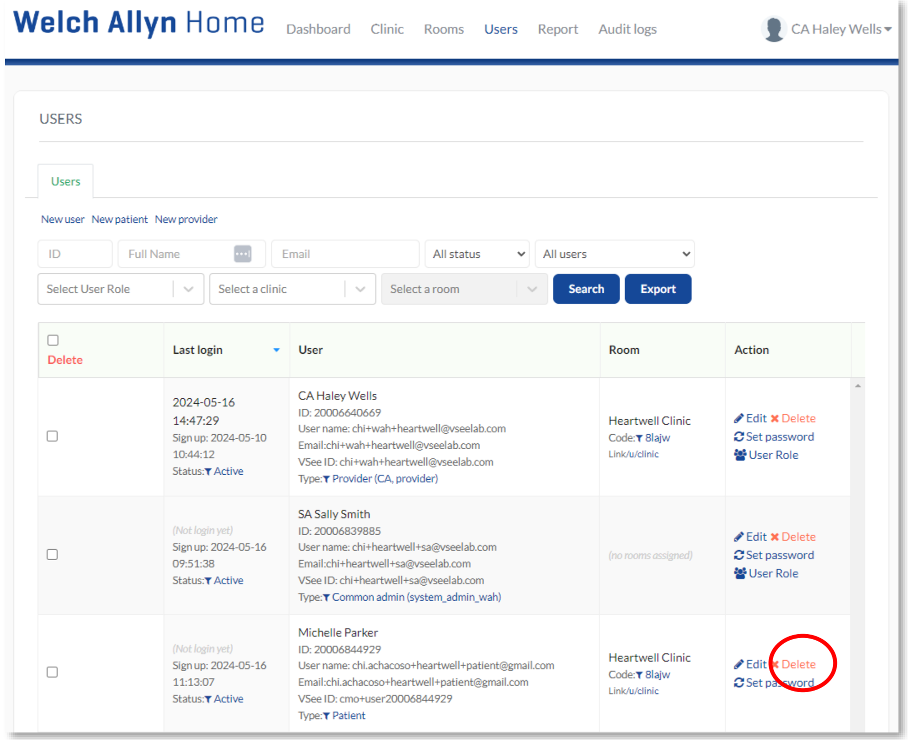
Share the log in information to the user.

Deleting Users



Click name on the right side of the menu bar.

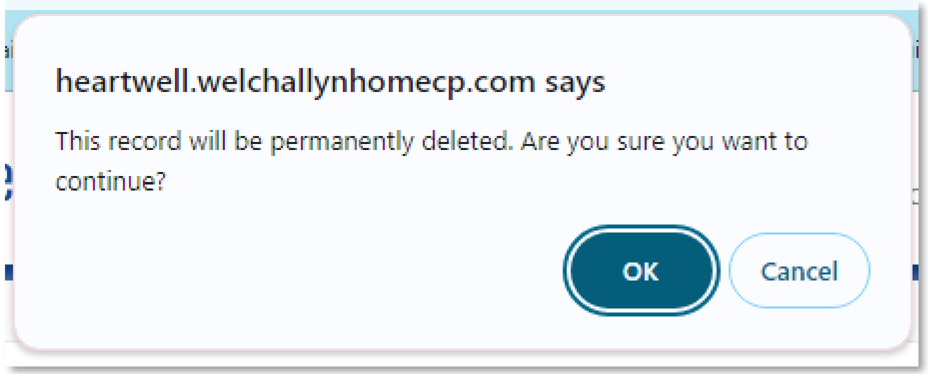
Click **Admin Panel**.



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

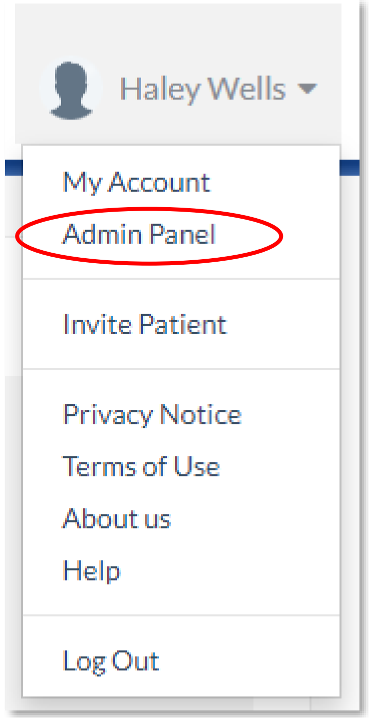
You can scroll through the list or search using the Full name or Email address to locate the user to update.

Click **Delete** in the Action column



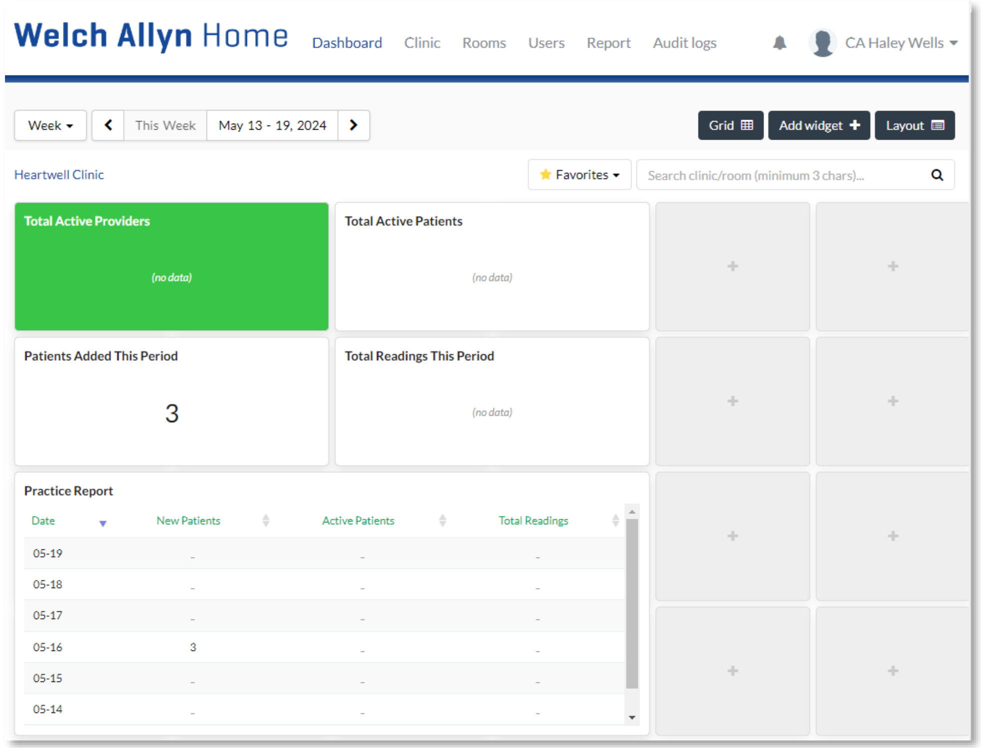
Click on **OK** to confirm deletion of the account..

Clinic Report



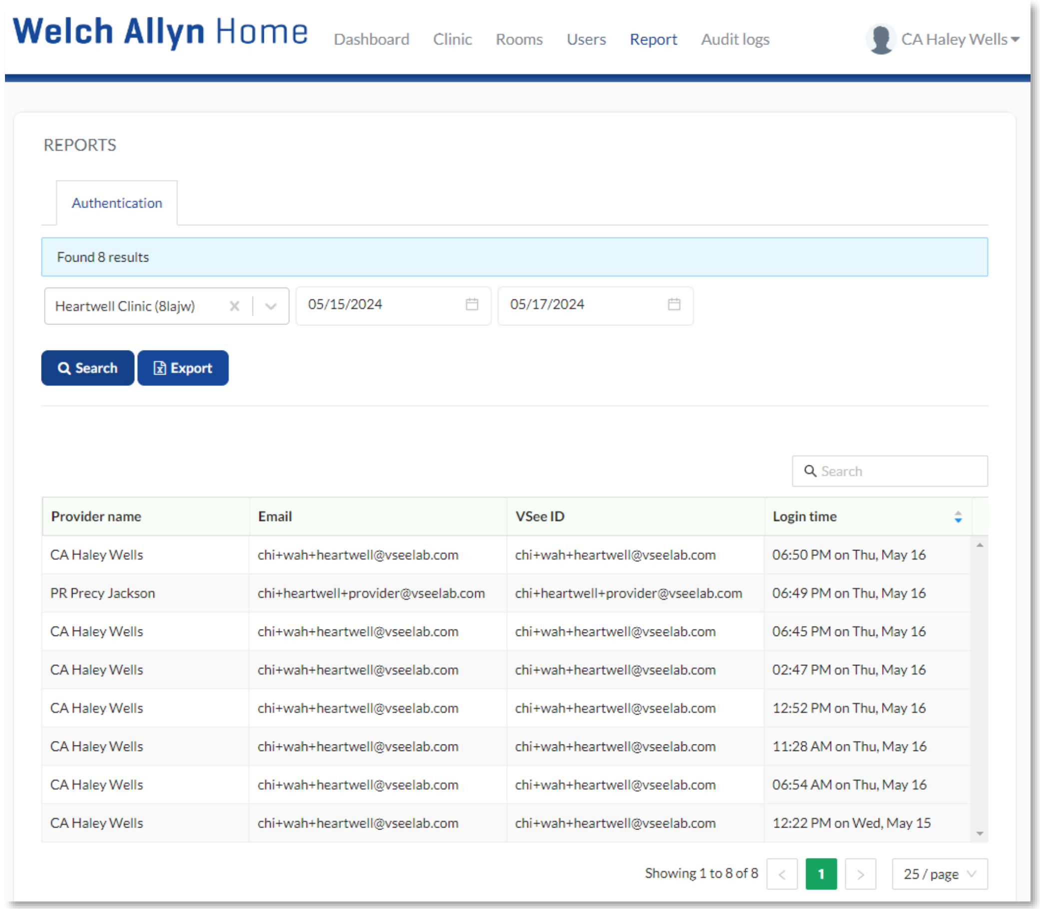
Click name on the right side of the menu bar.

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.

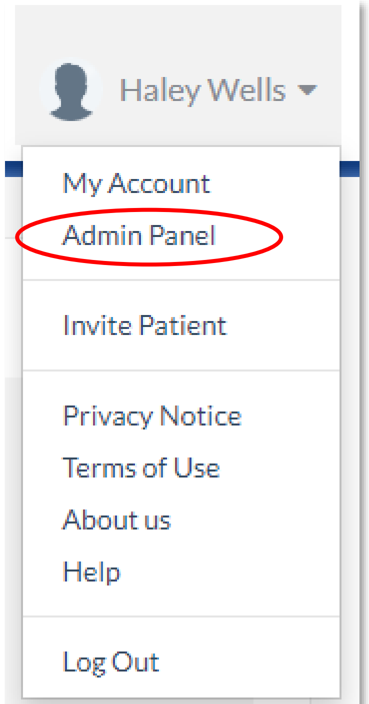
To save the information displayed, click **Export**. A spreadsheet containing the information is downloaded onto the computer.

Admin Panel Dashboard

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

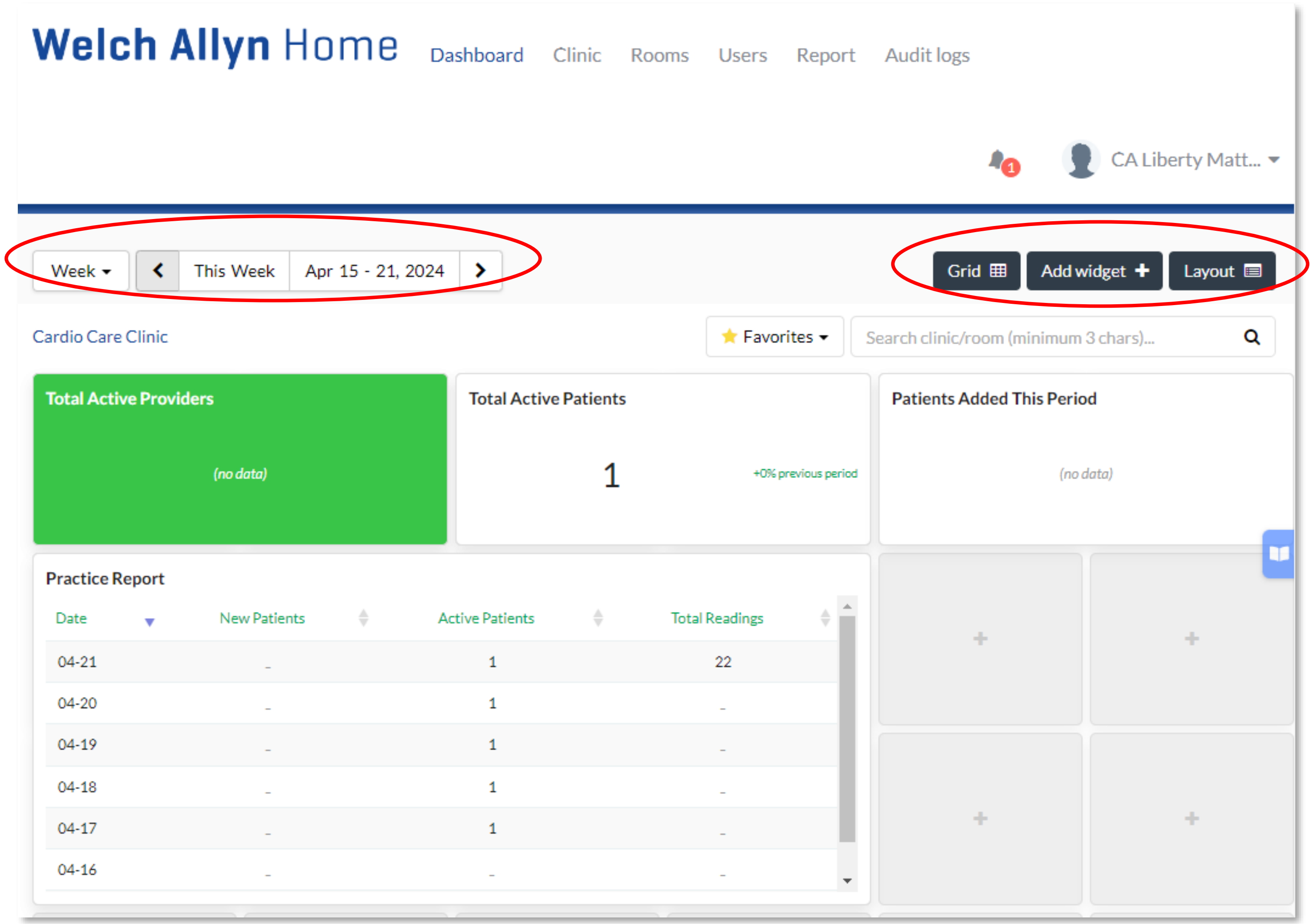
- Total Active Providers, Patients
- Patients added to a selected period
- Practice Report: New Patients, Active Patients and Total Readings

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**.



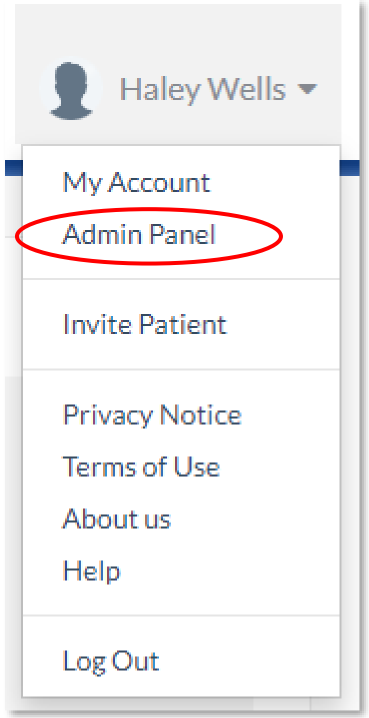
Select the **week / period**

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

Audit Logs

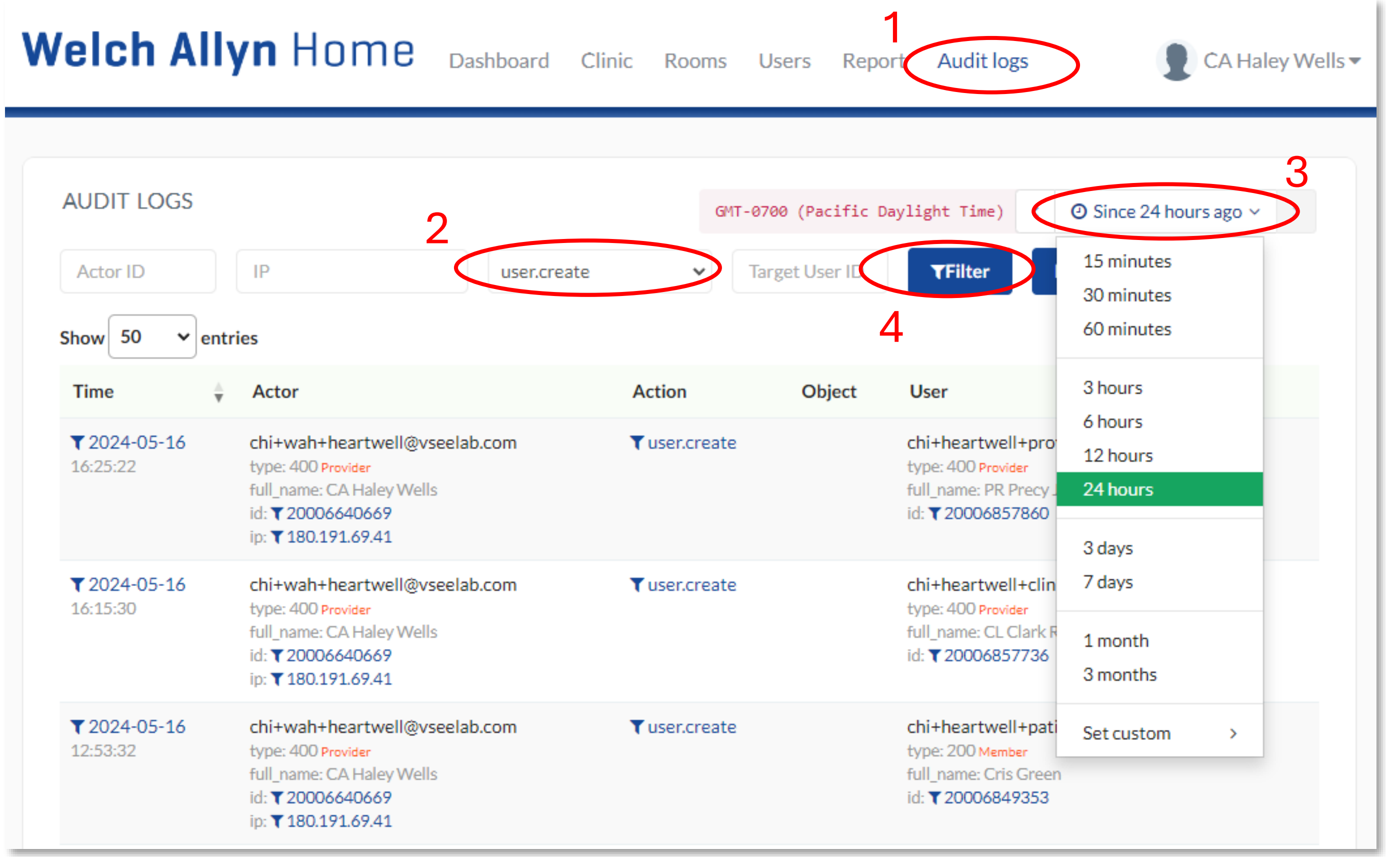
The audit log allows the Administrator and System Users to view a list of audit log entries.

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**.



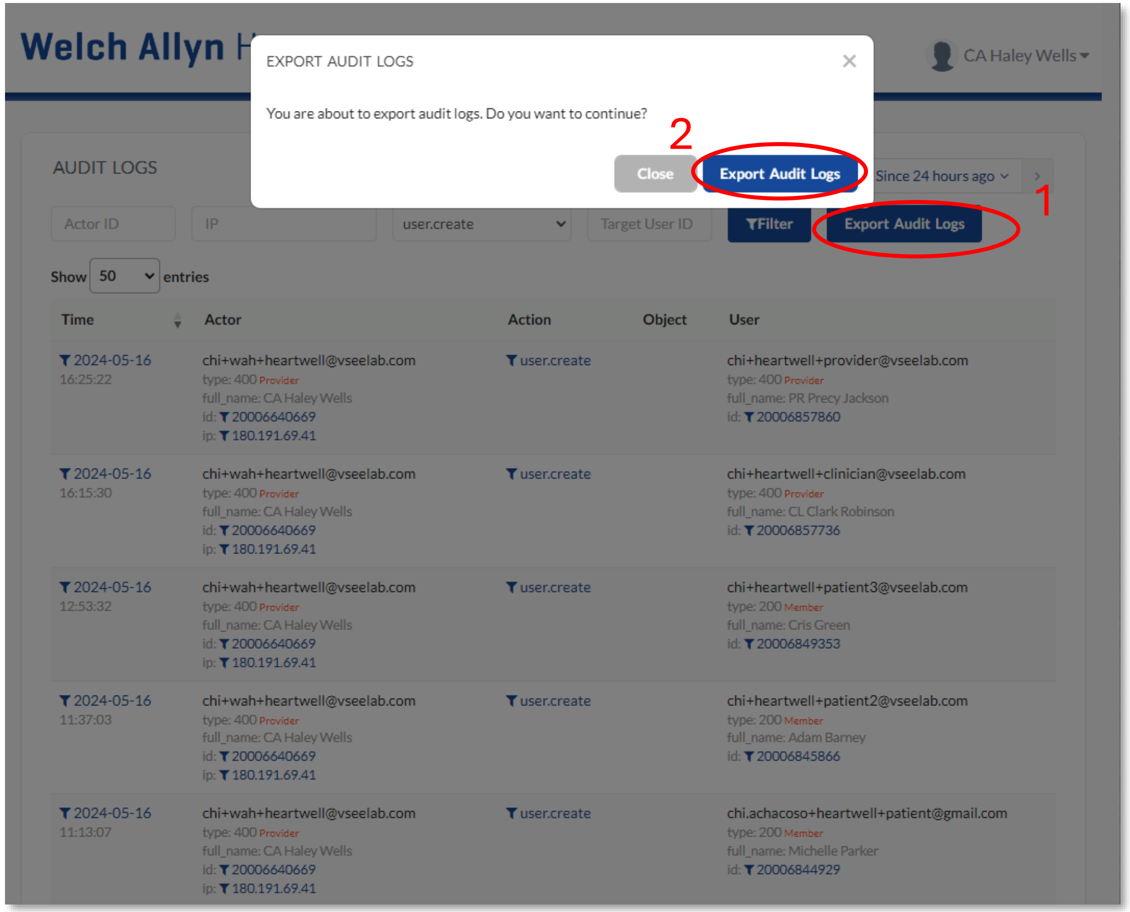
1 – On the menu bar, click **Audit Logs**.

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

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

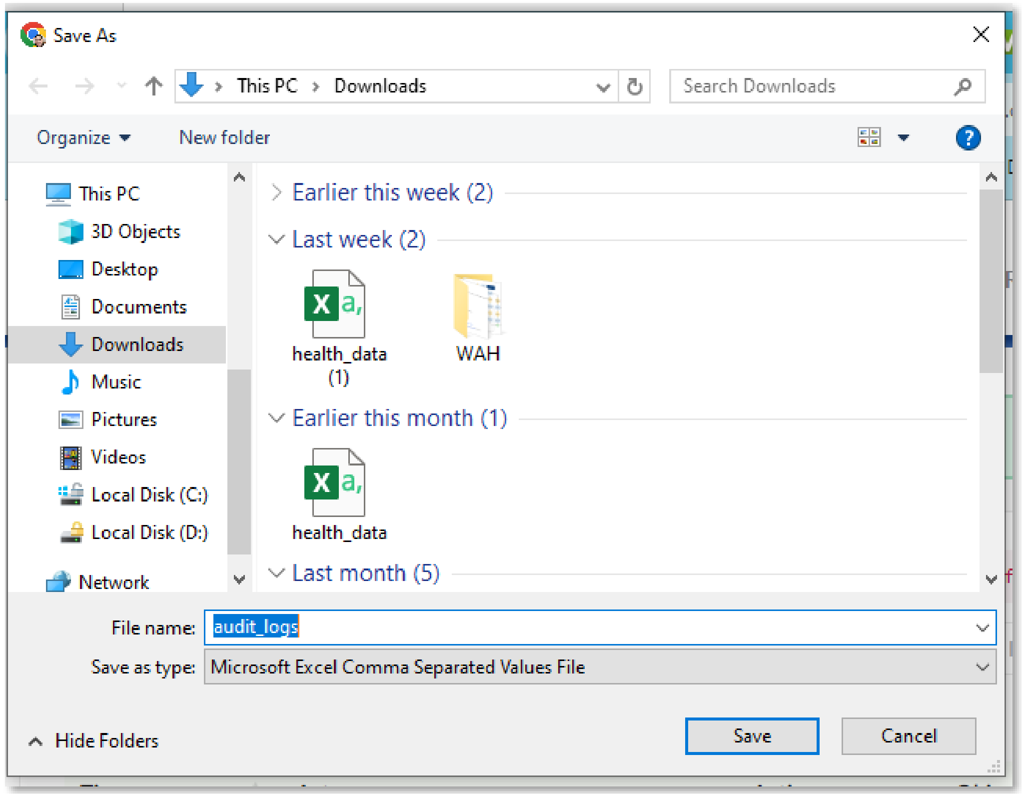
4 – Click **Filter**

Audit Logs – cont'd



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

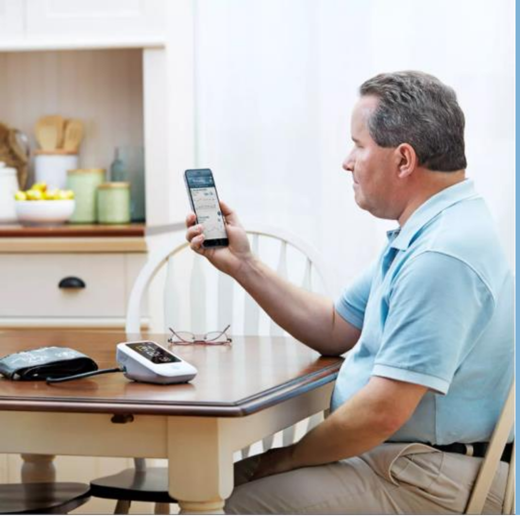
Click **Export Audit Logs** when the pop-up screen appears.



Click **Save**

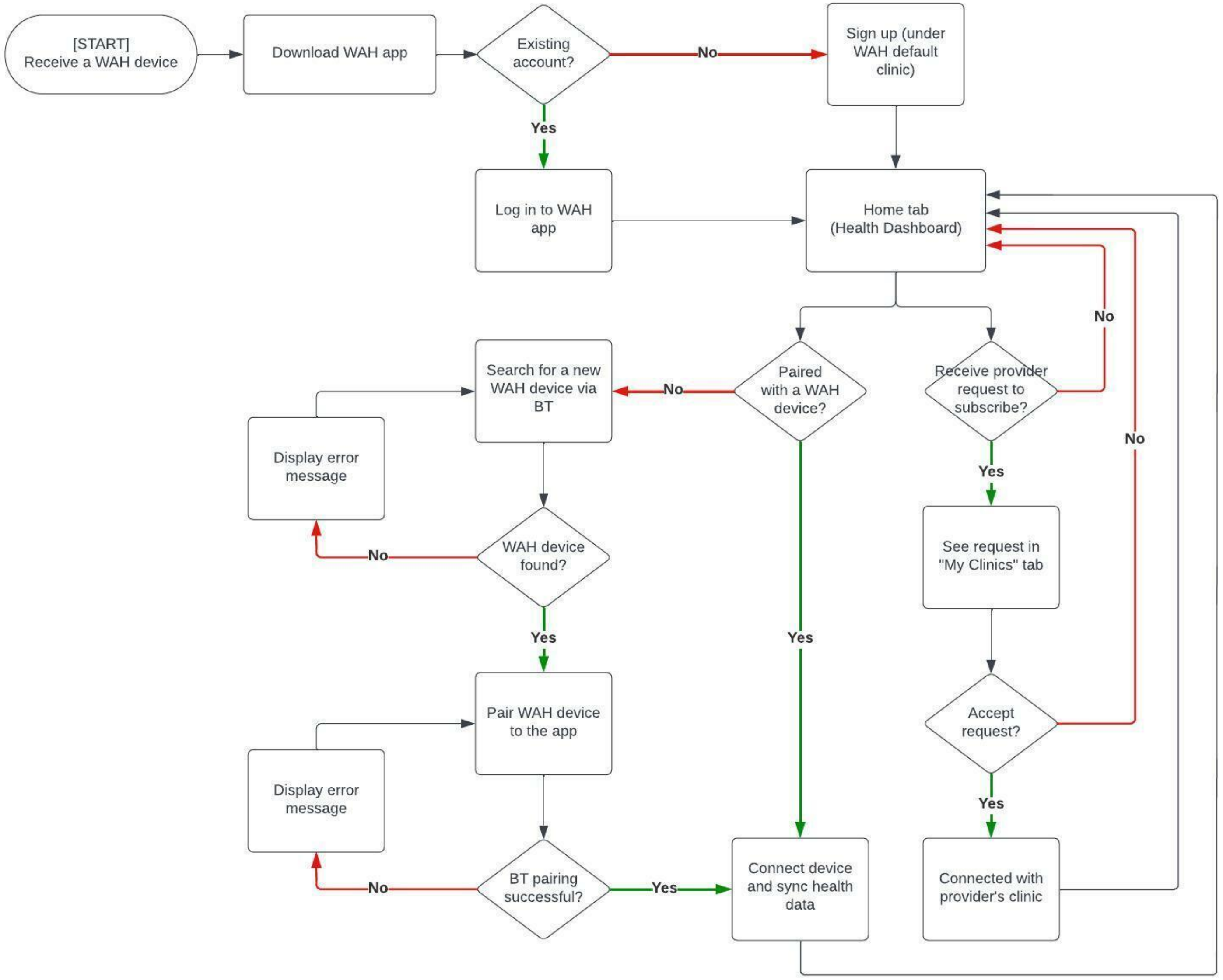
A spreadsheet (.csv) containing the information is downloaded onto the computer.

Welch Allyn Home



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	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)	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)	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 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

Welch Allyn Home <noreply@vsee.com>
to van+wahimport+loglmanivan223

10:27 AM (5 hours ago)

Dear **FirstName 4113 LastName 5877**,

Thank you for using Welch Allyn Home app. We are launching a new and better app for you. You are invited to activate your new account in the new Welch Allyn Home app.

Step 1: Download the new app below:

Download on the App Store | GET IT ON Google Play

Step 2: Activate your new Welch Allyn Home account:

Activate Now

Step 3: Launch the new Welch Allyn Home App and log in to your new account.

Step 4: You can now log in anytime.

Go to Welch Allyn Home Patient Portal

Button not working? Copy this link into your browser: https://wuqmi.test-app.link/

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!**

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

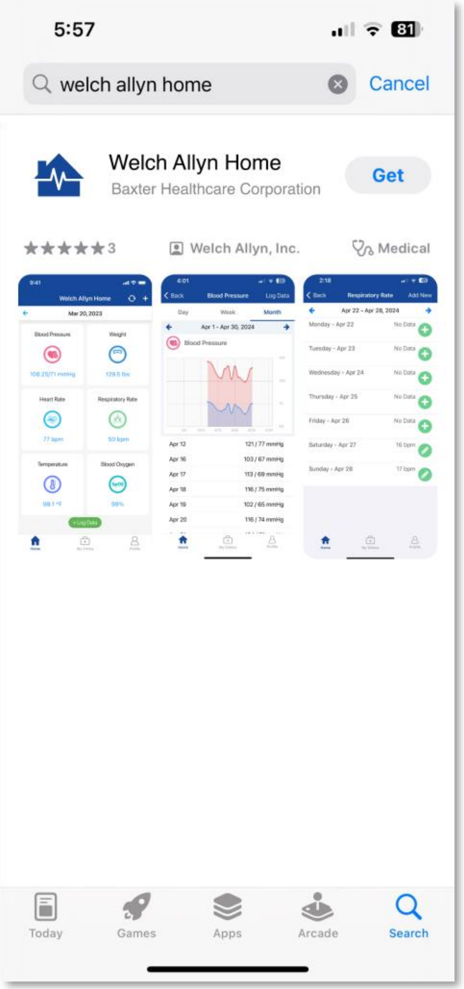
The tutorial video showed an older version of this email. We have added the Go to Welch Allyn Home Patient Portal button on the update.

Existing Patient – cont'd

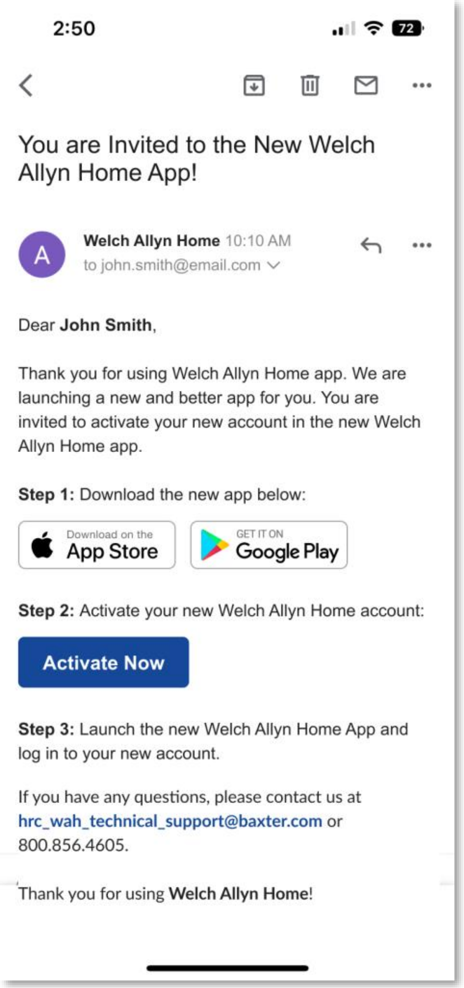
To download the App:

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

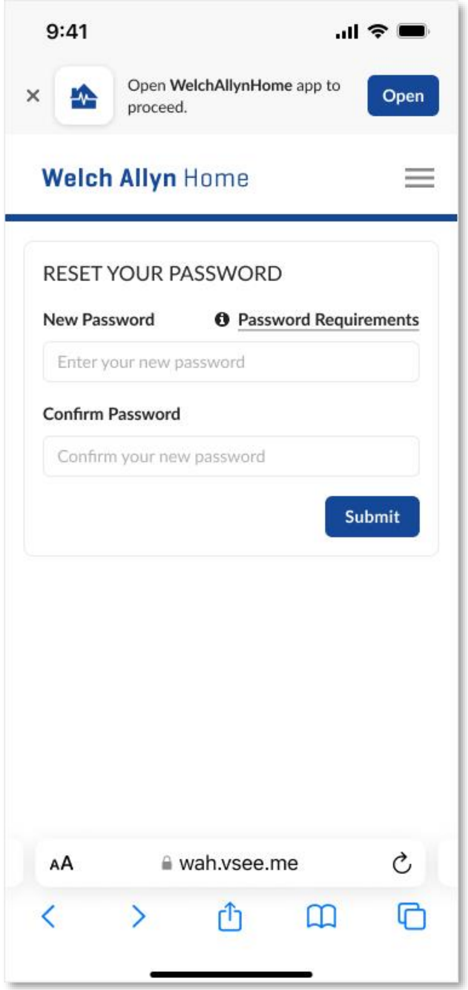
B – Search for Welch Allyn Home from the App Store or Play Store



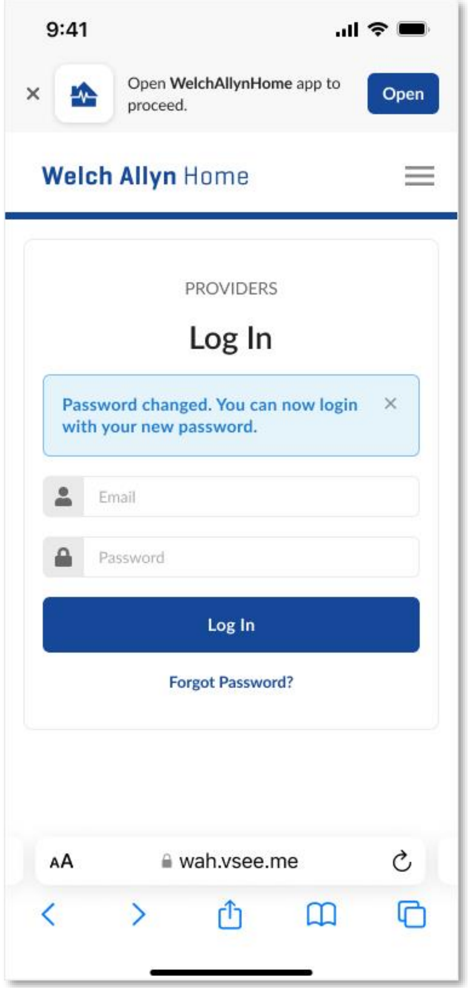
Tap **Get/ Install** > **Download**



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



Enter a password that meets the requirements and renter to confirm



Enter the email and password

Tap **Log In**

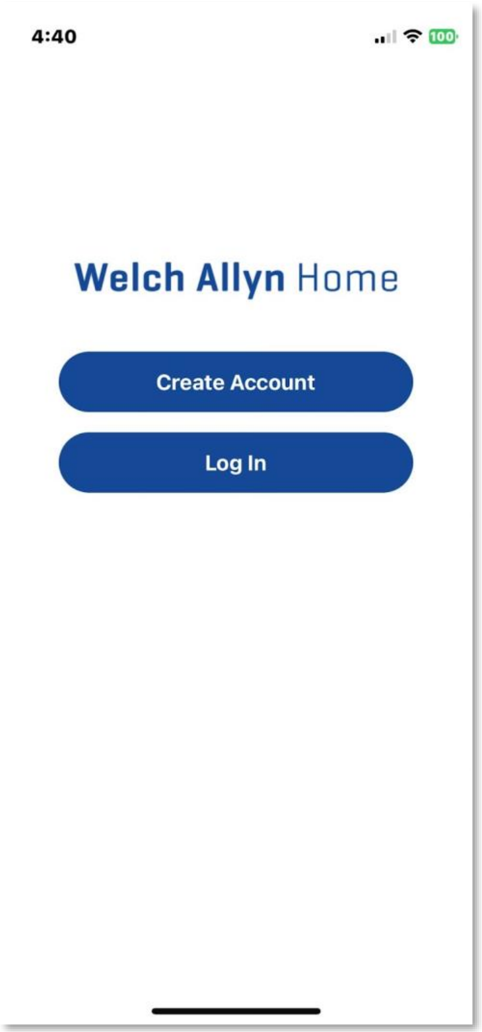
Open the **Welch Allyn Home App**

Welch Allyn Home

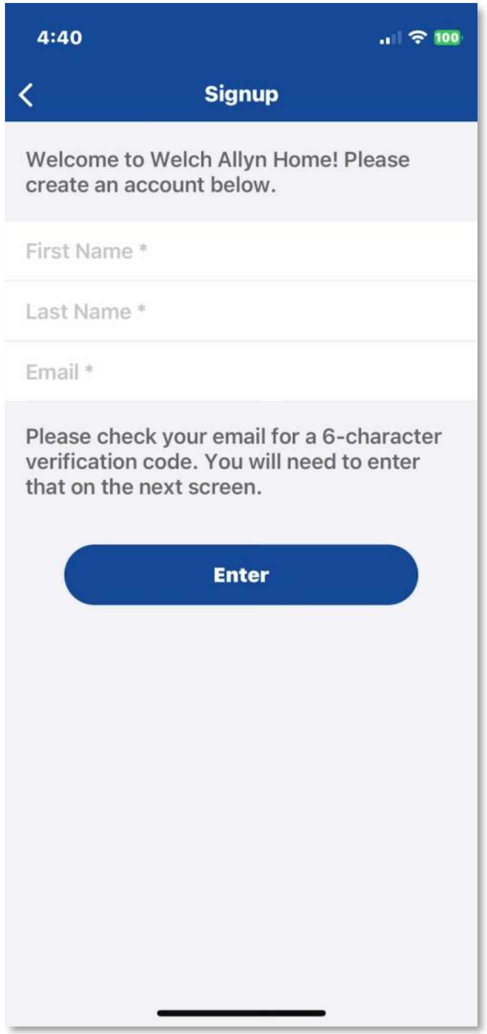
New Patient – Patient Sign-up

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.***

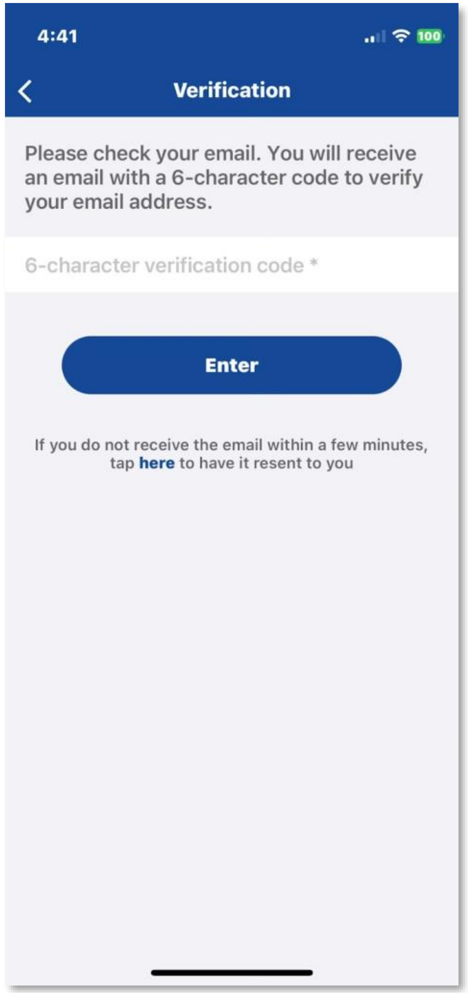


The patient inputs their ***First Name, Last Name, Email*** and hits ***Enter.***

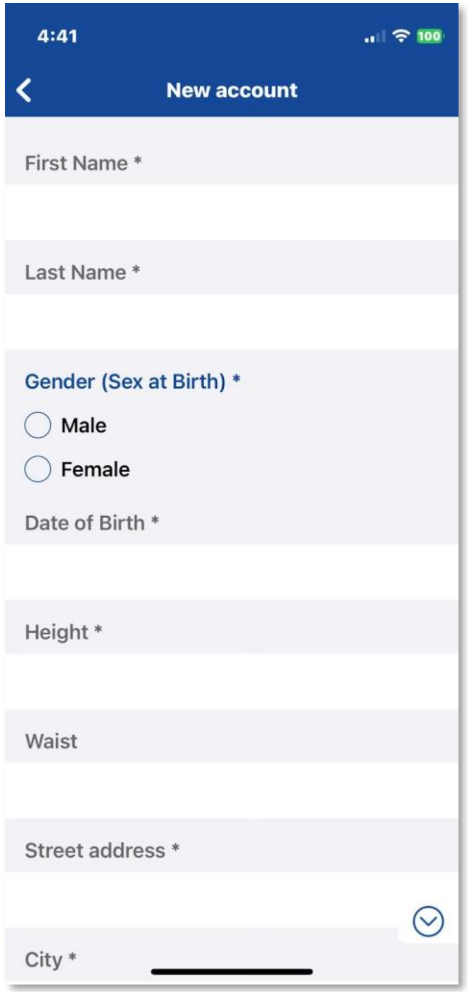
New Patient – Patient Sign-up – cont'd

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

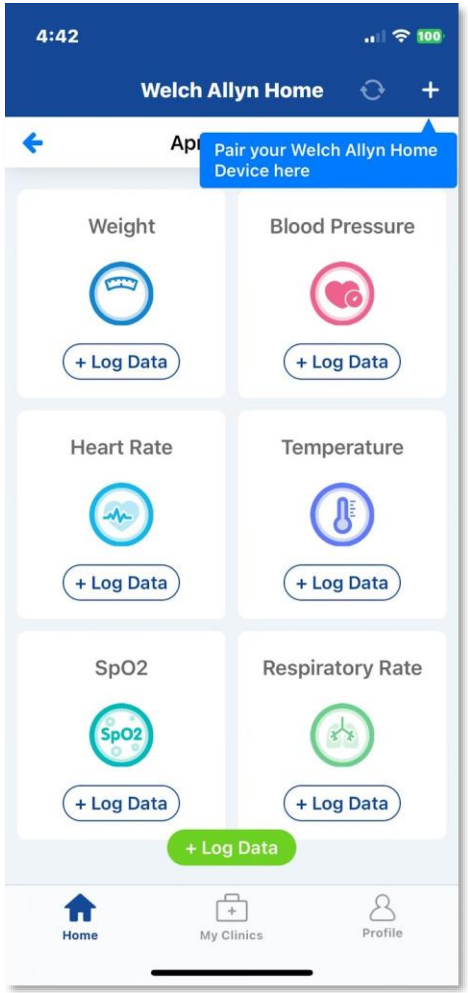
4. Sign in the Welch Allyn Home App or Welch Allyn Home Web Portal



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



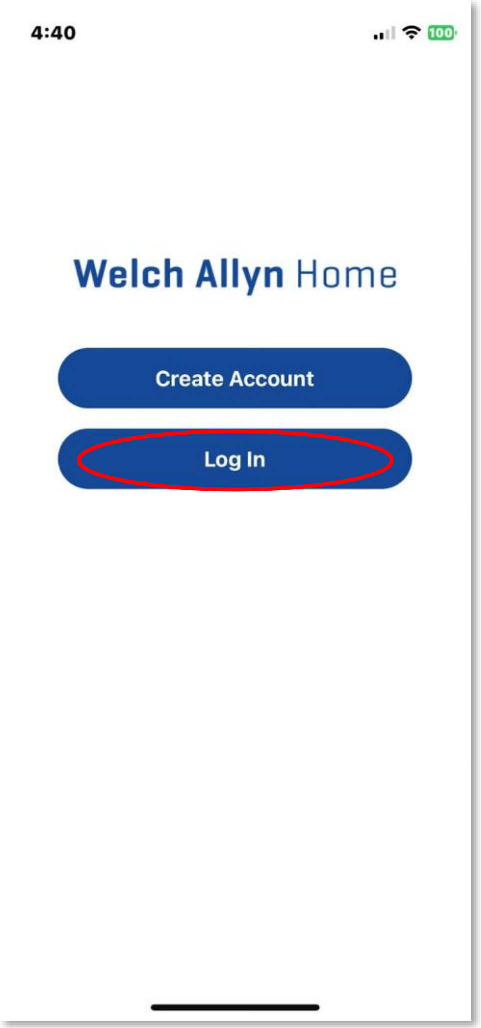
The patient must fill out all the *required fields* and hit ***Create.***



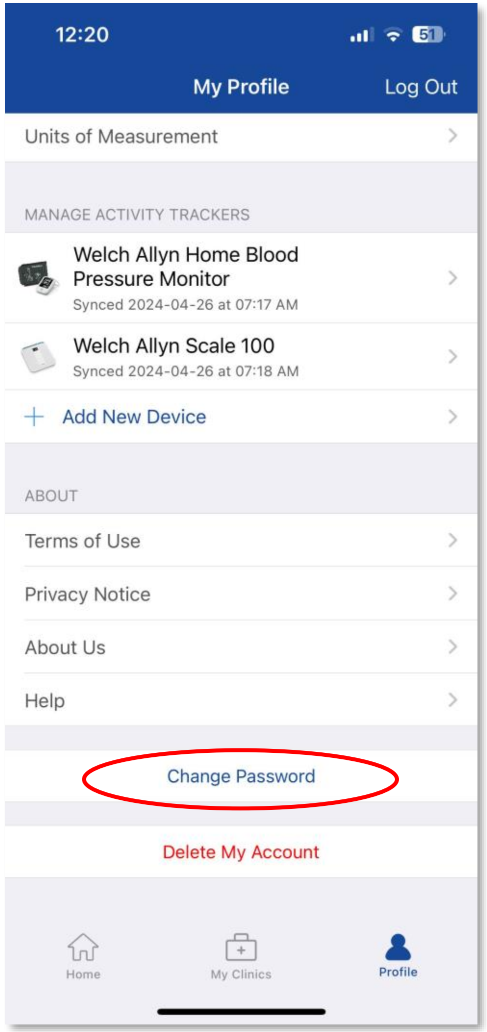
The patient is now logged in to the WAH mobile app and sees the Home tab.

New Patient – Created by Admin

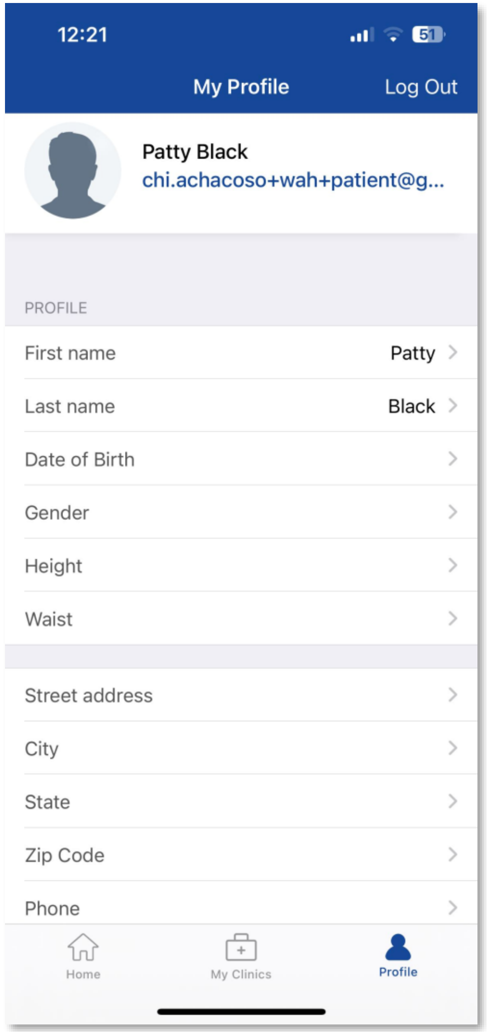
1. An Admin will create a new patient account and set a password for the Patient. Admin shares the password to the Provider/Clinician
2. Provider/Clinician shares the password to the Patient
3. Patient downloads the Welch Allyn Home App
4. Patient logs in the Welch Allyn Home App using the email and 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.*

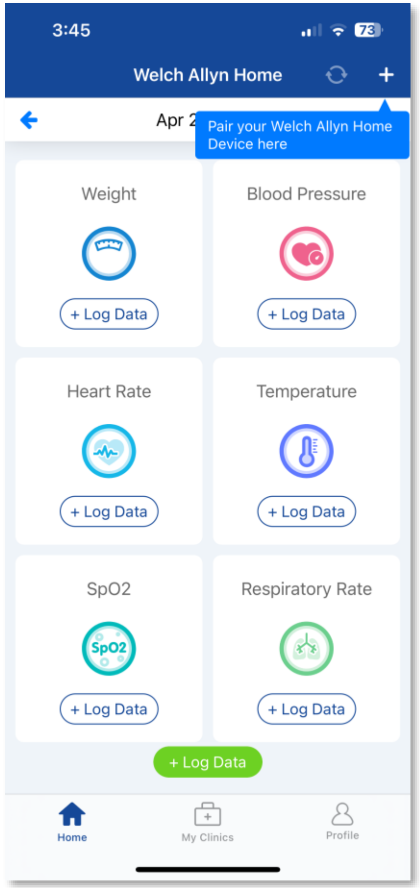


Tap ***Profile*** *then scroll down and tap Change Password. Enter the needed information to change password and tap the* ***Update*** *button.*

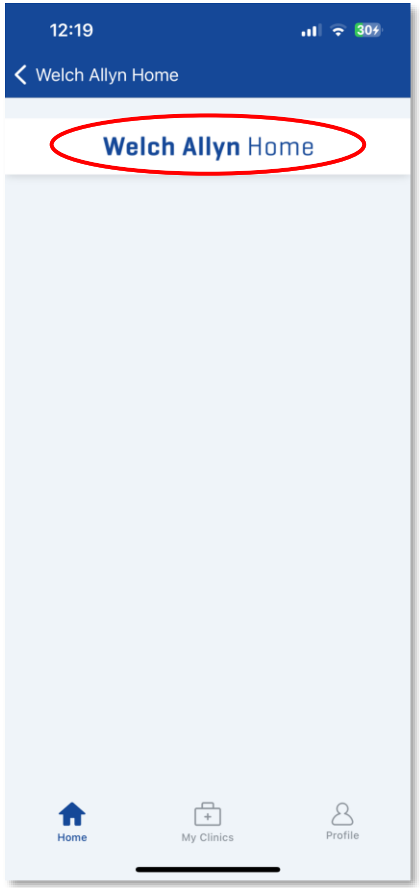


Still under ***Profile.*** *Tap the detail to be updated. Enter the information and tap* ***Save.***

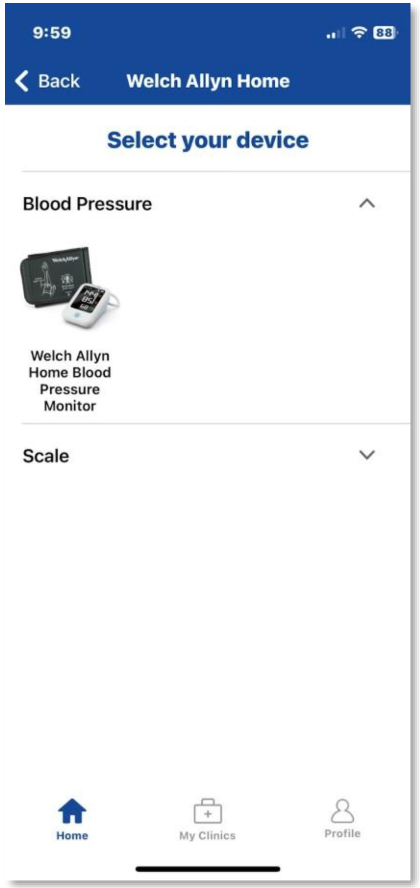
Pairing a Blood Pressure Monitor or Weight Scale

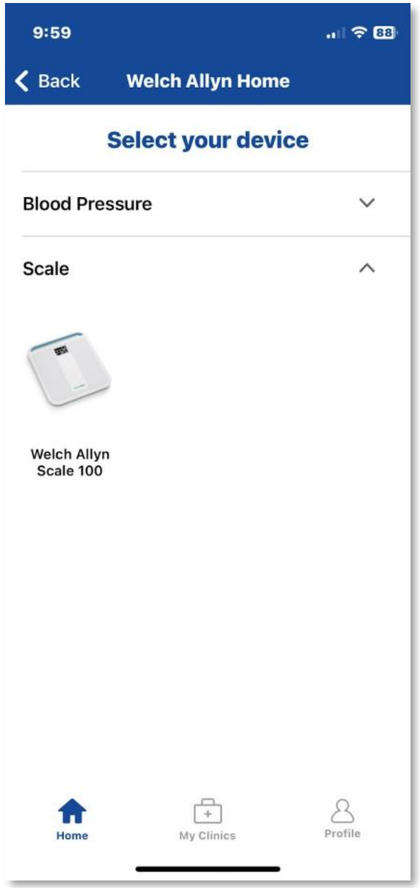


From the Home tab, tap the **+** *icon* on top right

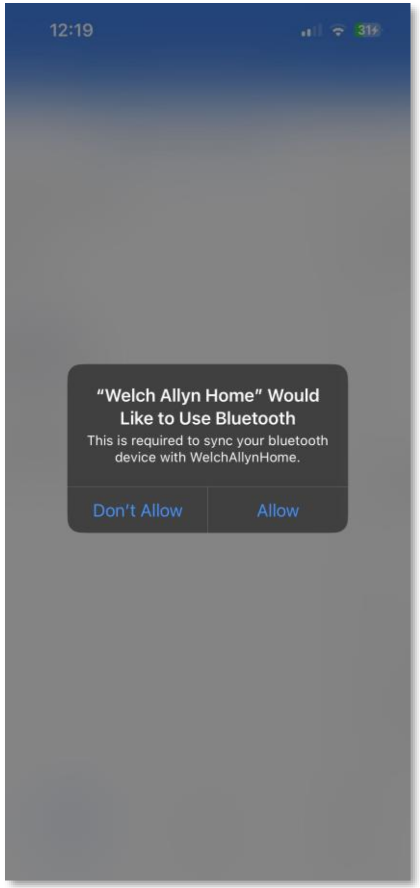


Touch the **Welch Allyn Home** words/logo





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



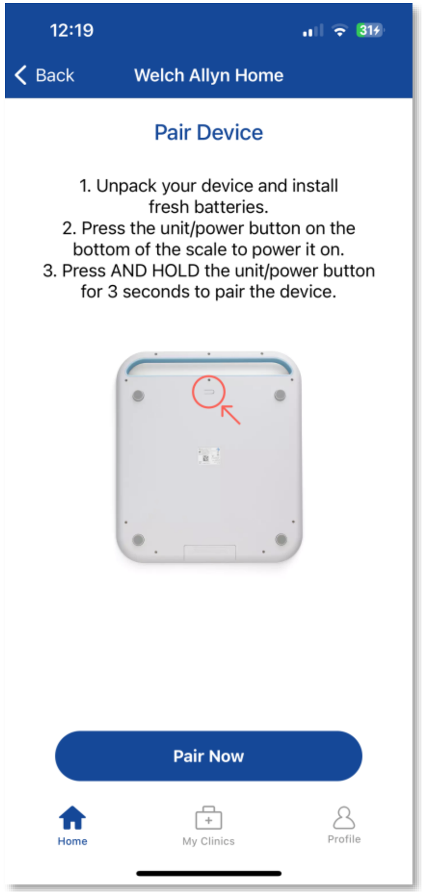
Allow/ Accept related messages on iOS or Android for the device to access bluetooth

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.

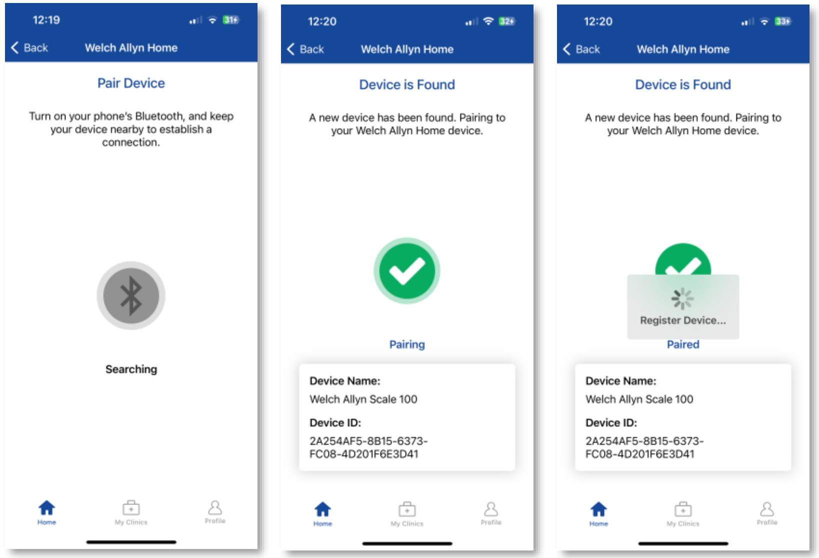


Tap **Pair Now**

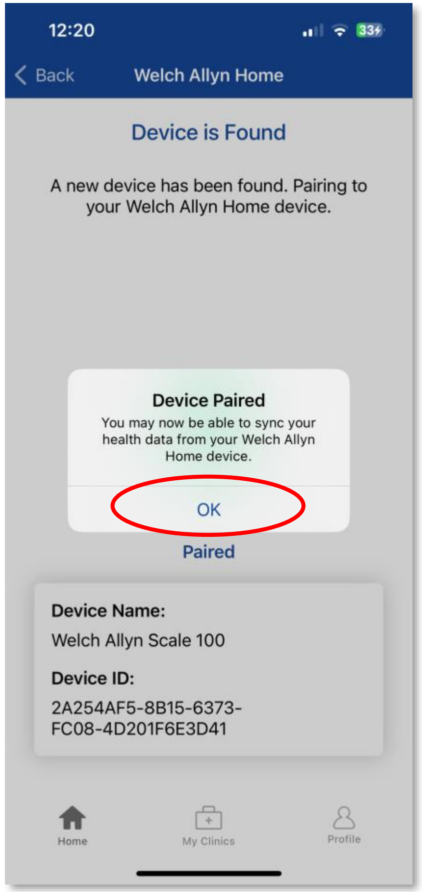
Pairing a Blood Pressure Monitor or Weight Scale – cont'd

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

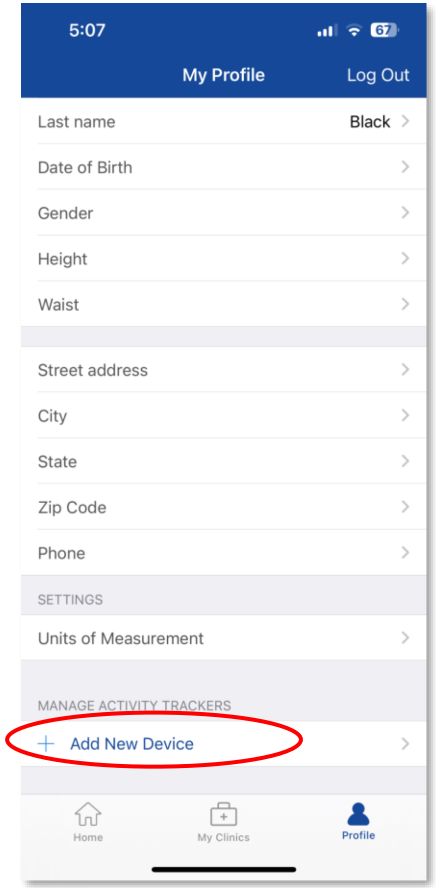


Tap **OK**

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

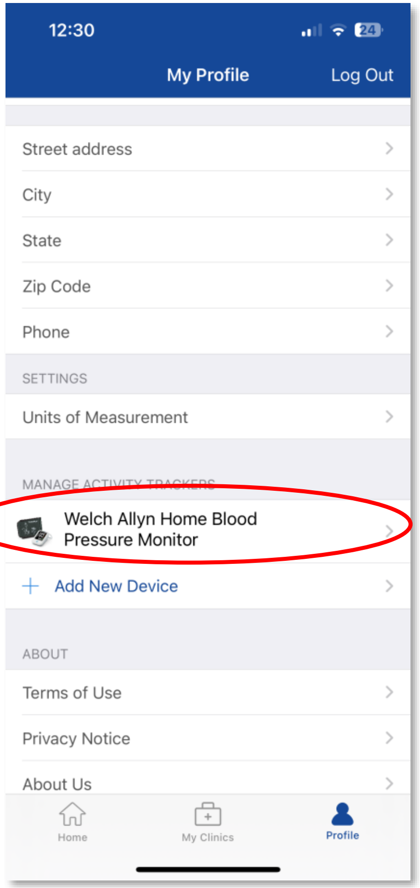


Pairing of a blood pressure monitor or weight scale can be done as part of the Patient's first-time login or later by completing the steps discussed previously.

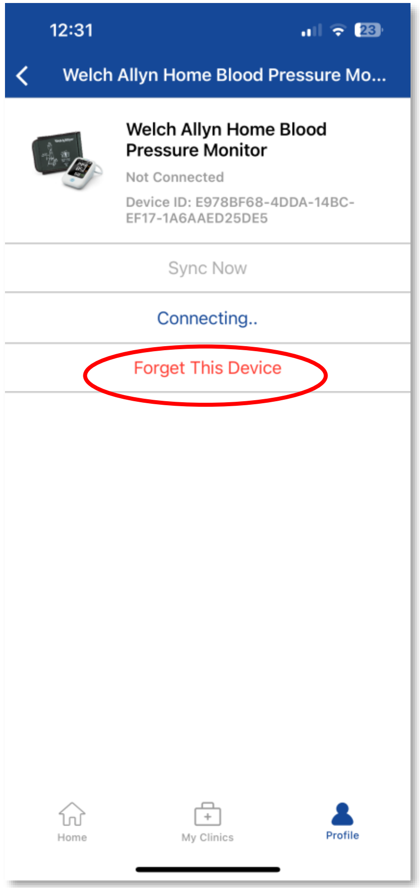
Note:

- 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.

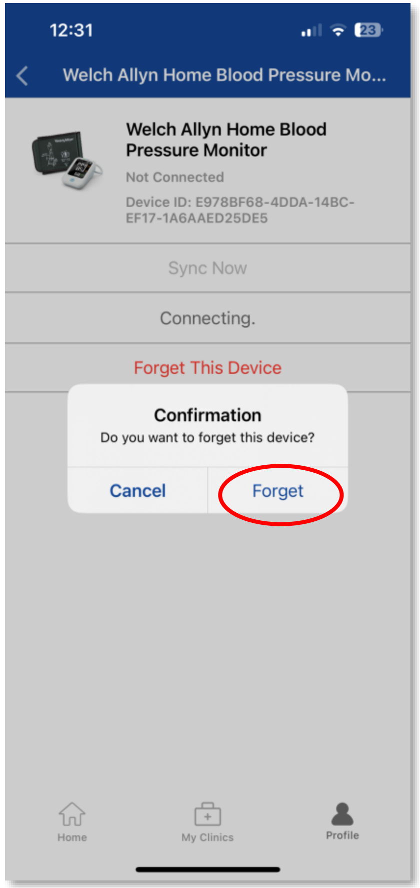
Removing/ Unpairing a Device



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



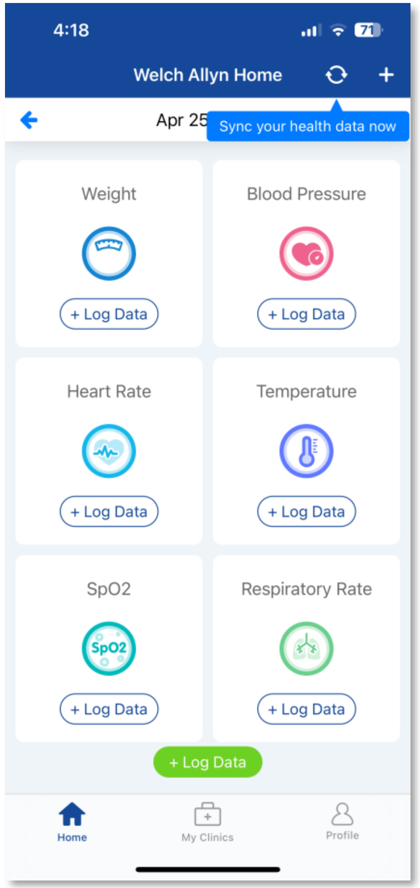
Tap **Forget This Device**



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

Taking a Reading on a Paired Blood Pressure Device or Scale

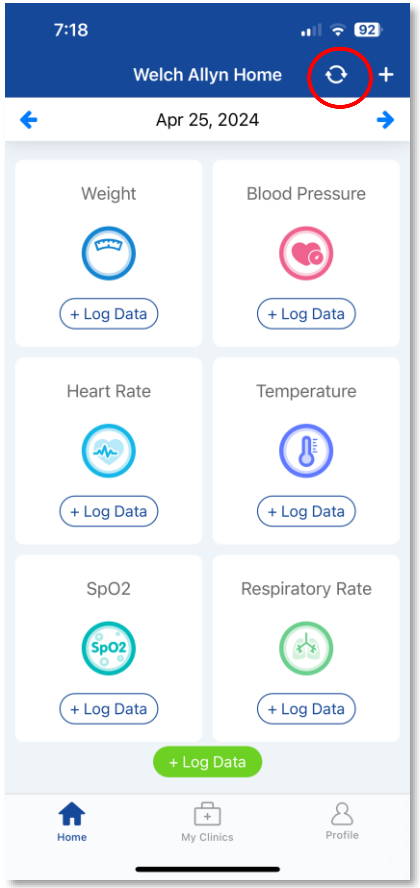
- After a device has been paired, a Patient can already sync their health data or opt to do it at another time.
- All readings taken on the device before pairing will not be saved in the Welch Allyn Home App.
- The App has to be open and logged into in order for the readings to transfer.
- Tap the circular **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.



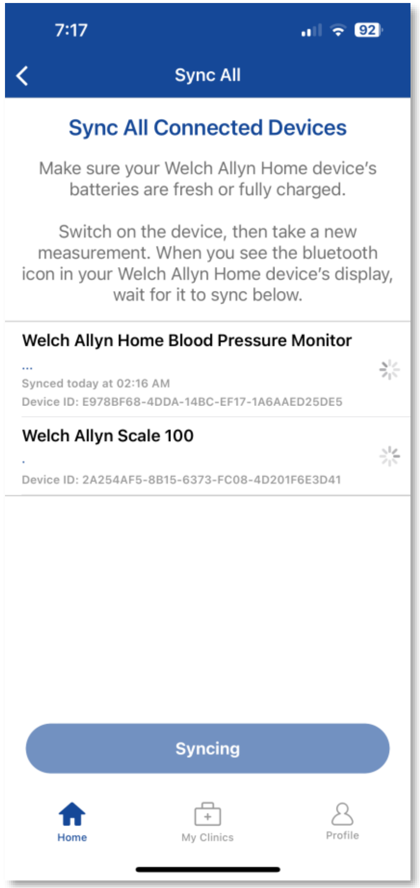
Tap the **Sync All** icon to start syncing readings

Taking a Reading on a Paired Blood Pressure Device

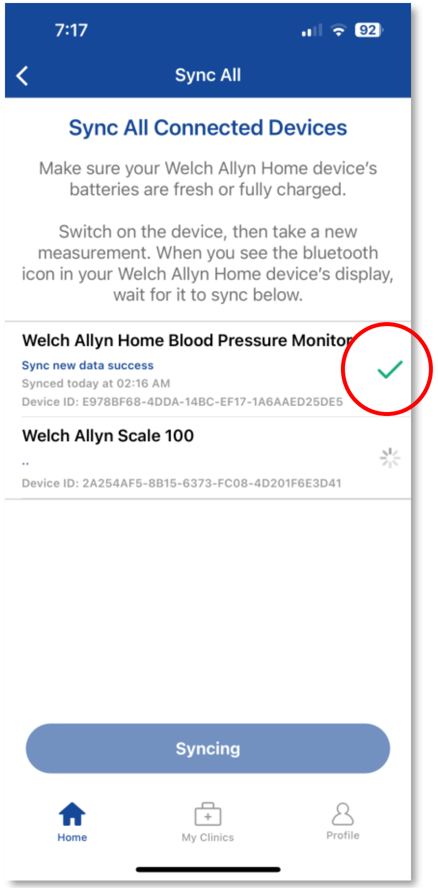
- It is advised that the patient place the blood pressure cuff on the arm and sit comfortably for 5 minutes before taking the reading.
- Press the power button on the monitor to begin the blood pressure measurement.



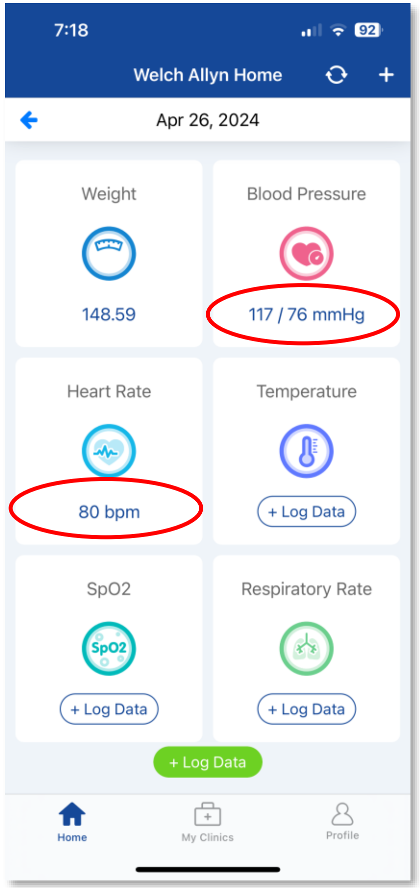
Tap the **Sync All** icon



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

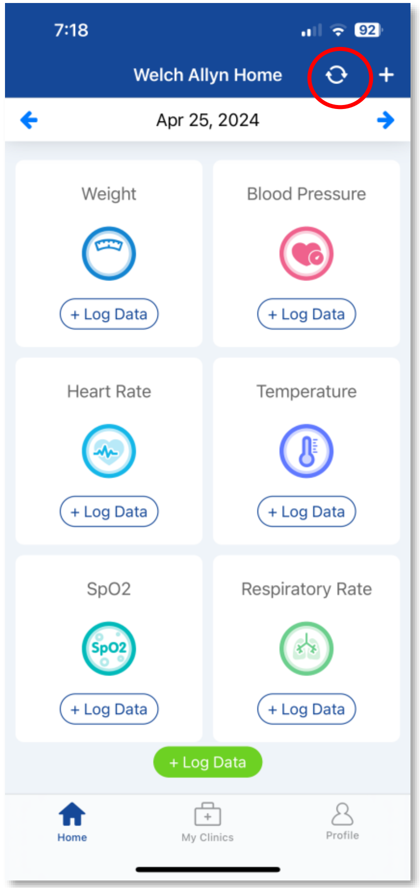


The blood pressure and heart rate readings will display on the Welch Allyn Home app health tiles

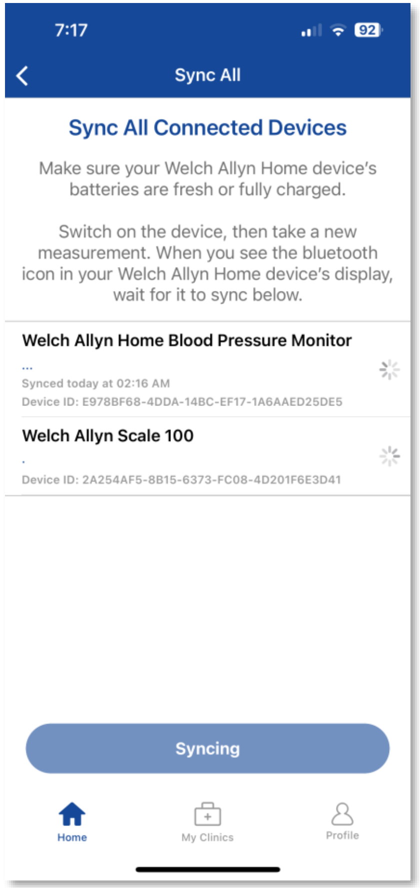
Taking a Reading on a Paired Weight Scale

- 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.

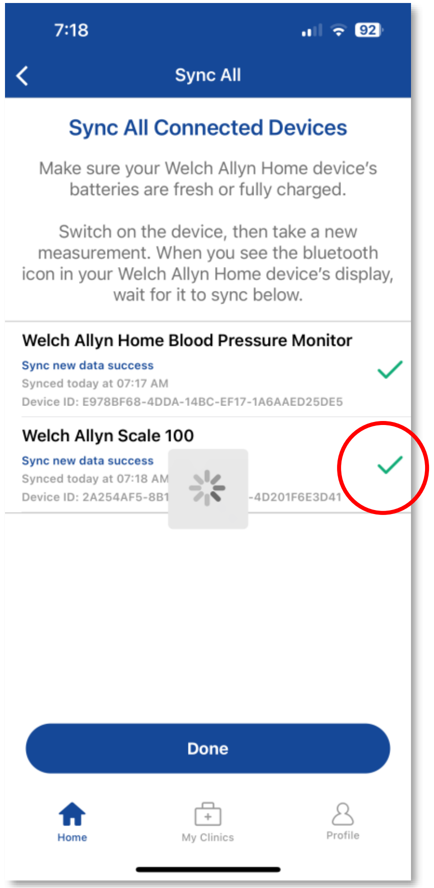
A variance range of +/- 0.1 exists between the scale reading and app display for weight due to the conversion formula between kilograms and pounds.



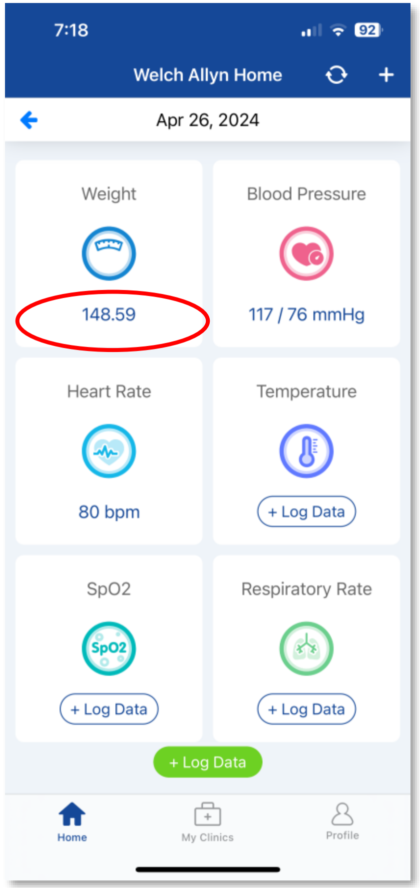
Tap the **Sync All** icon



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

Welch Allyn Home

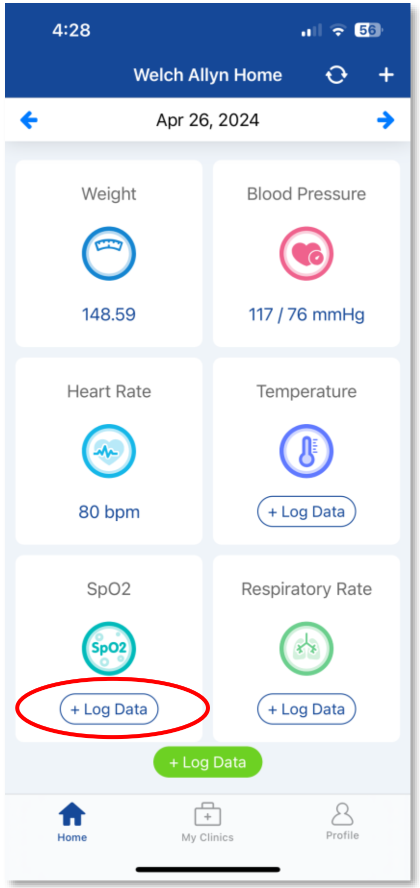
Entering Readings Manually – Option 1

3 Ways: 1 of 3

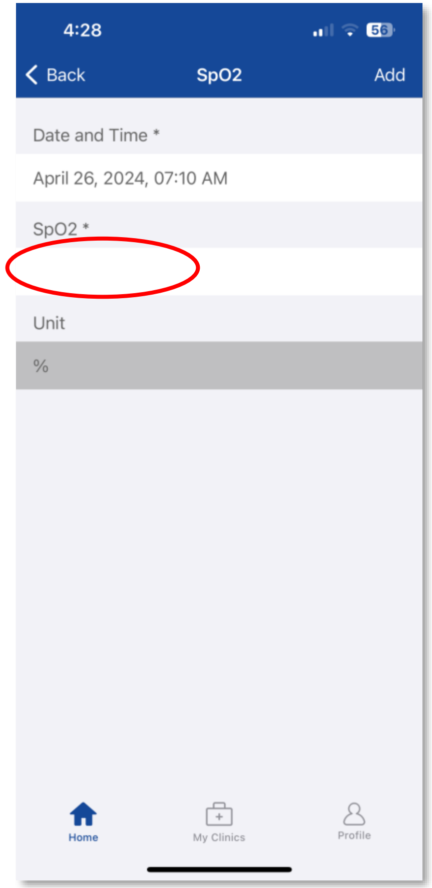
Option 1 – No recorded reading for the day yet

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

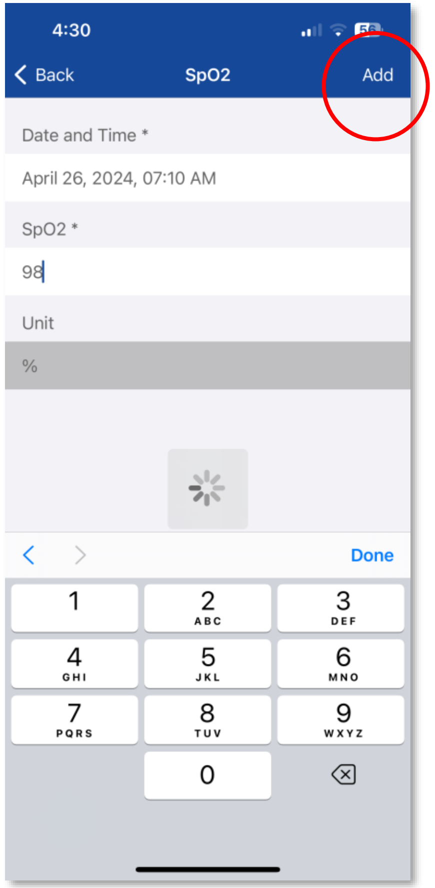
Note: Tapping outside the +Log Data button of the Tile would show the same screen as that of Option 1B



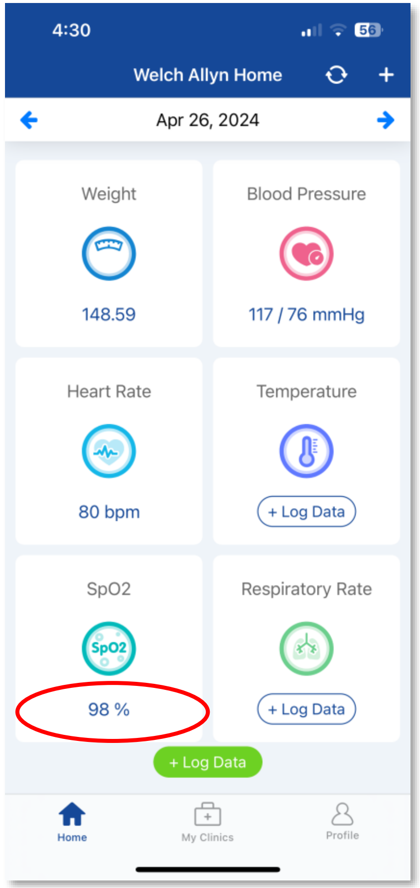
Tap **+Log Data** below the desired measurement type



Enter the reading



Tap **Add**



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

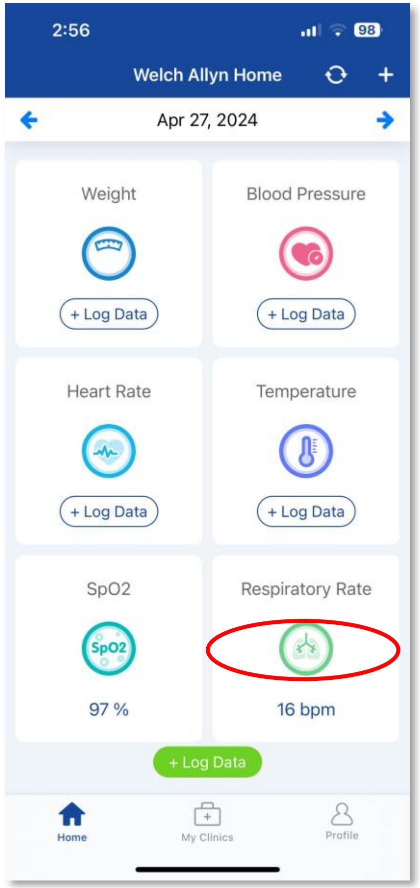
Entering Readings Manually – Option 2

3 Ways: 2 of 3

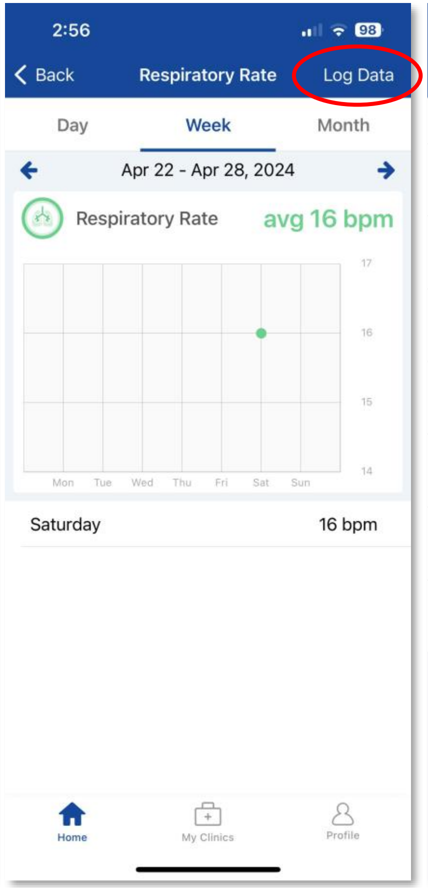
<u>Option 2 – A reading shows on the health tile</u>

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

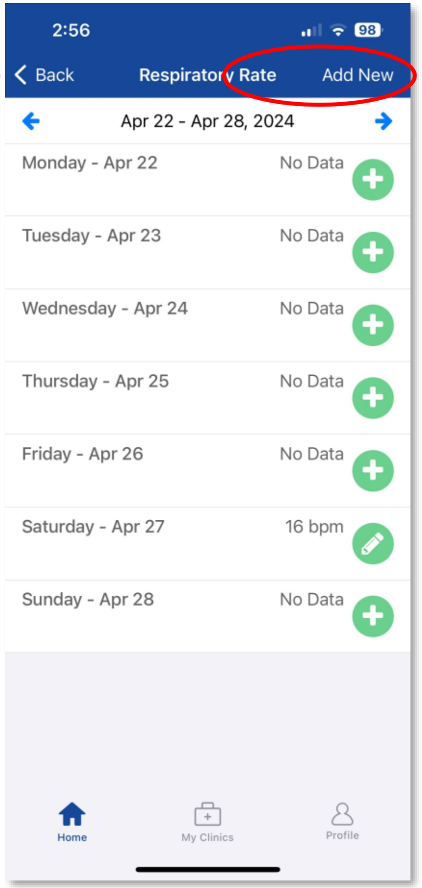
Note: Only the most recent reading will show on the Home dashboard health tile



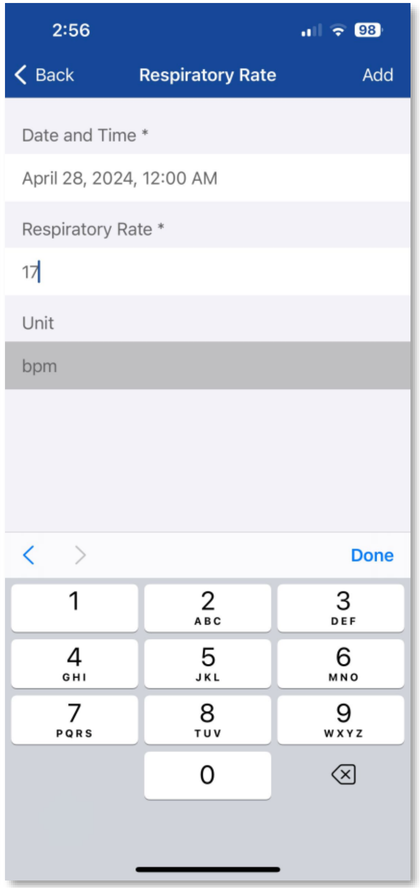
Tap anywhere within the tile of the desired measurement type



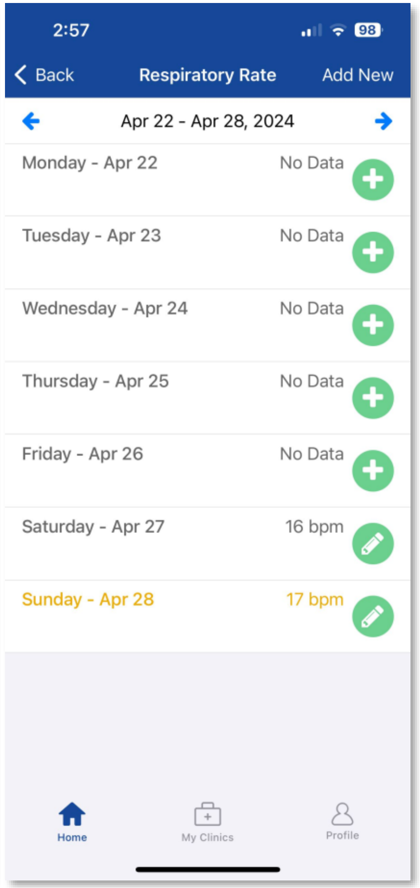
The week view will automatically display. Tap **Log Data**



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.

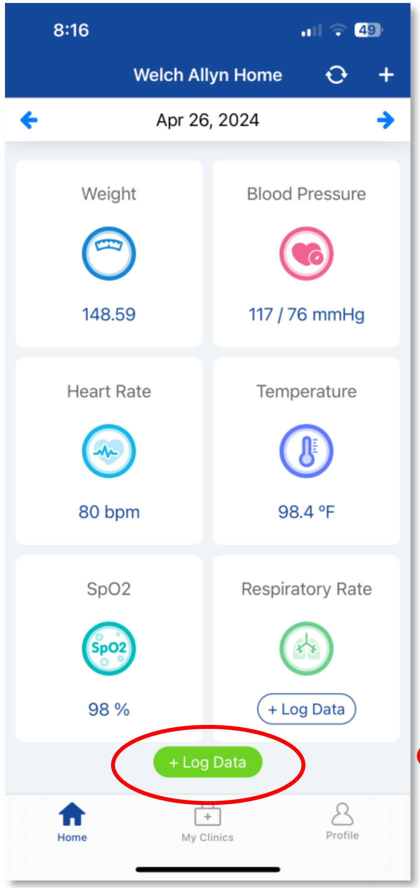
Click back 2 x to show the Home screen where the reading should reflect

Entering Readings Manually – Option 3

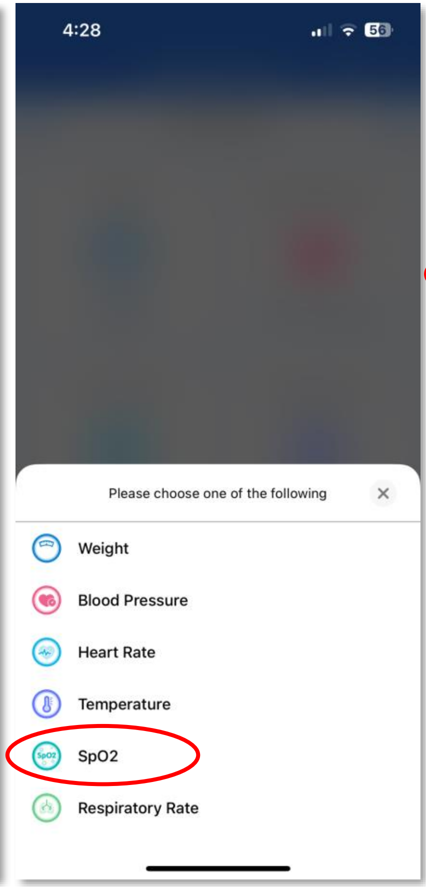
3 Ways: 3 of 3

Option 3 – Select from the list of measurement types

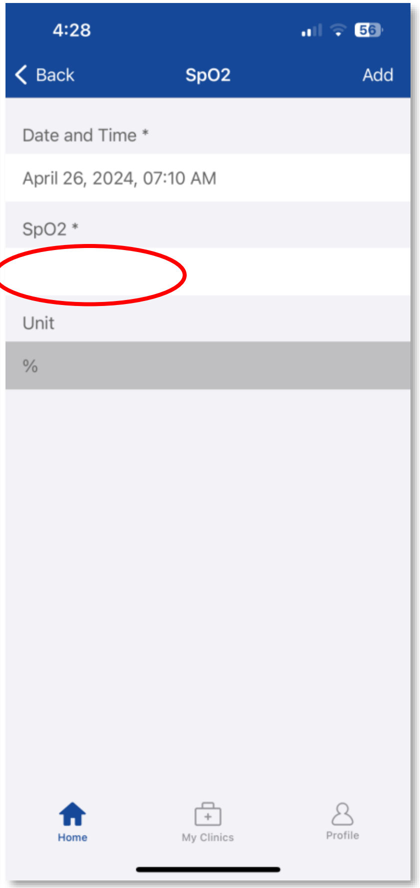
Tap the green **+ Log Data** button at the bottom part of the screen



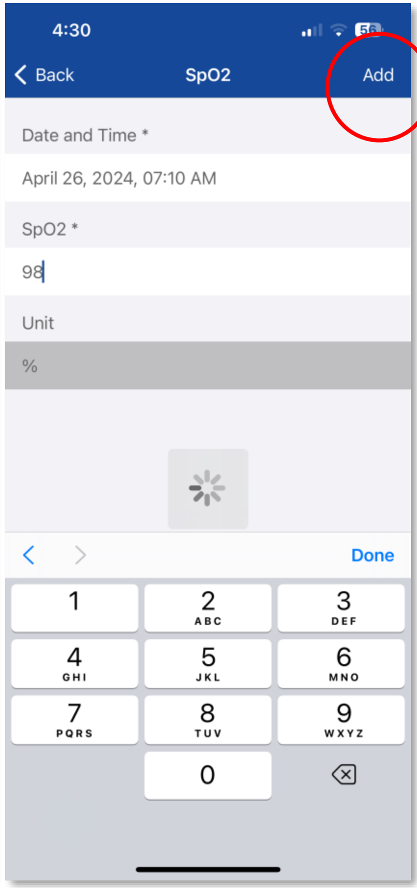
Tap anywhere within the tile of the desired measurement type



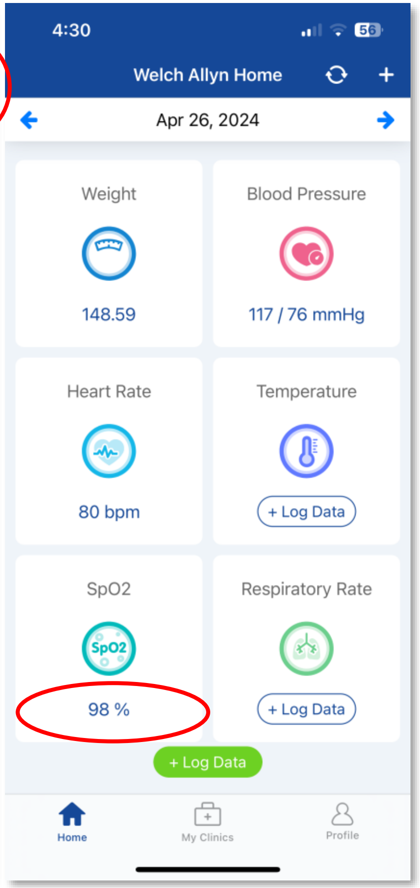
The week view will automatically display. Tap **Log Data**



Enter the reading



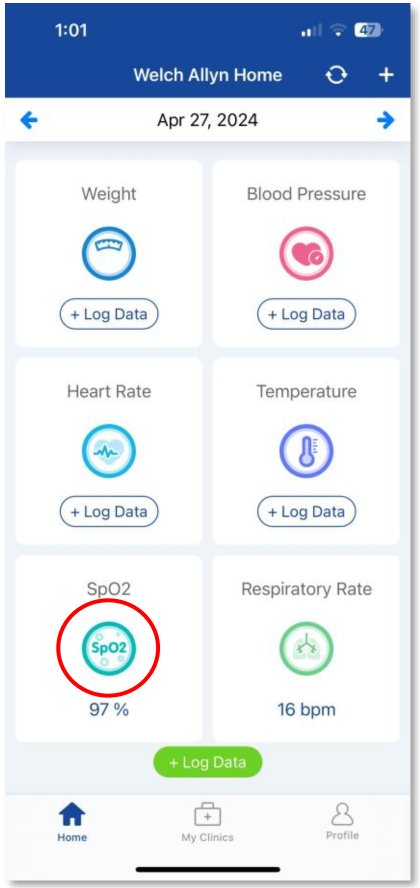
Tap **Add**



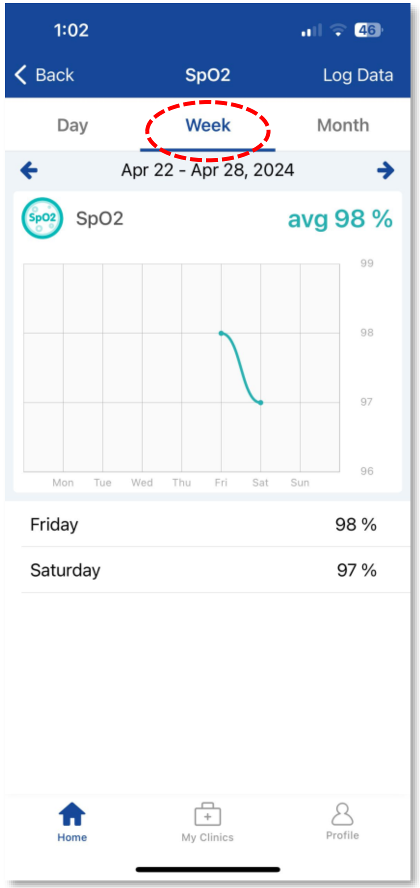
The reading will display on the Welch Allyn Home app health tile

Reviewing Readings

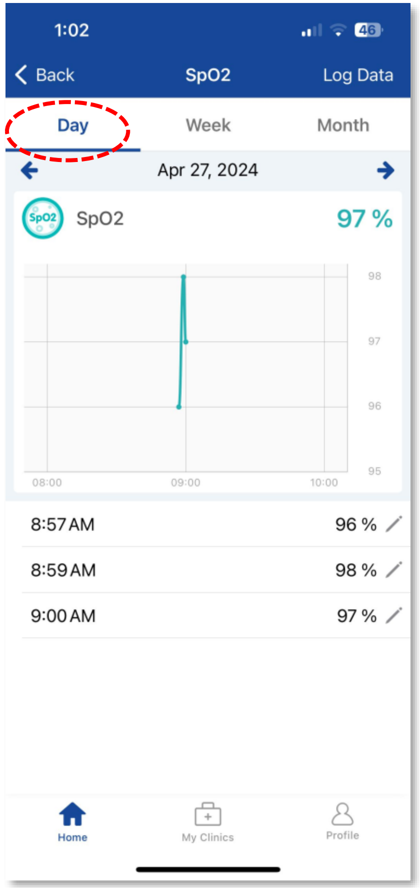
- Home Screen – the most recent readings of each measurement type is displayed.
- Readings may be filtered by touching **Day**, **Week** or **Month** view.
- Only the most recent reading for the day is used in the computation for the Average reading.
- To go back to the Welch Allyn Home screen, touch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



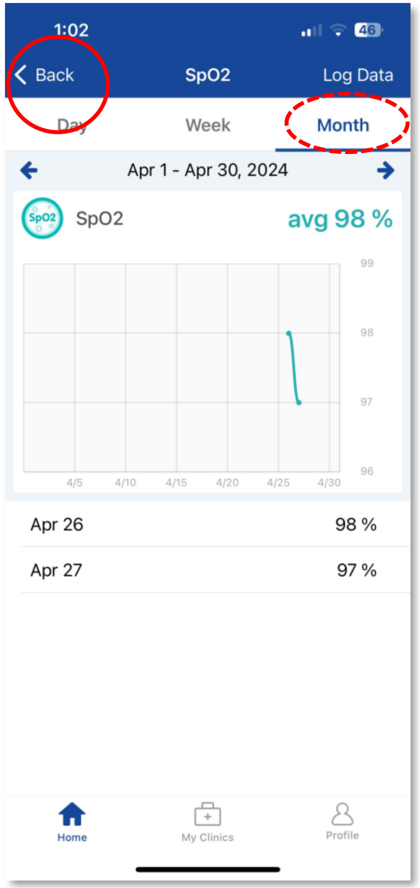
Tap on the icon of the measurement to view a detailed list of readings



By default, the screen shows the Week view.



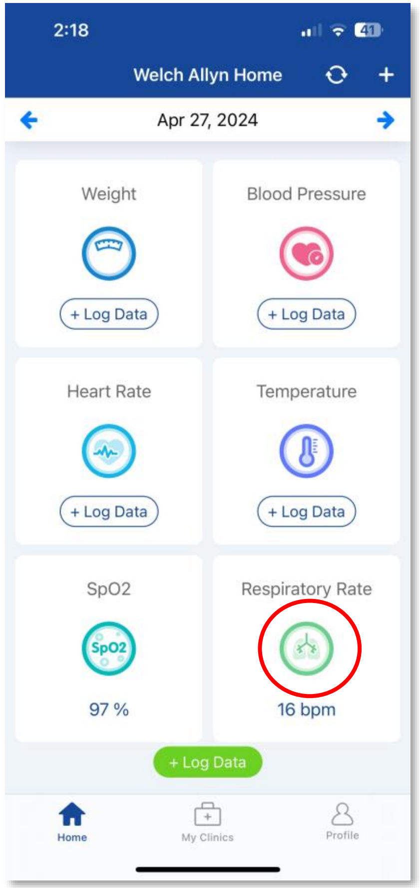
Day view



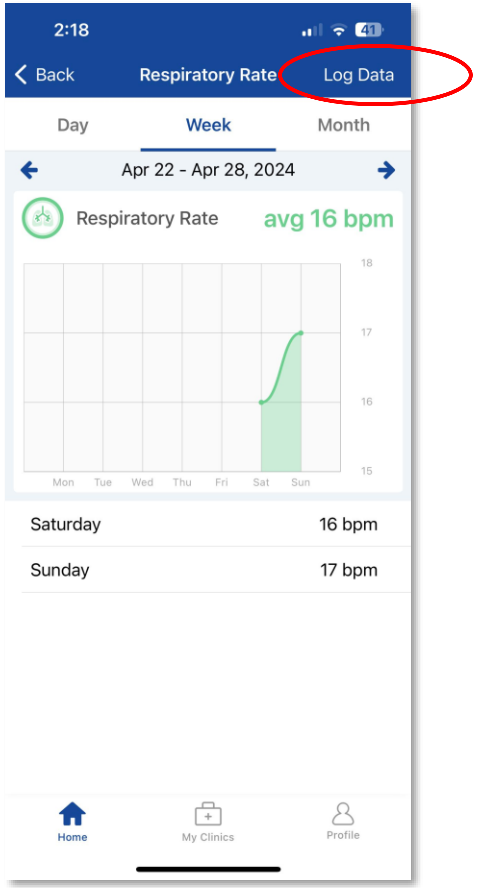
Month view

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

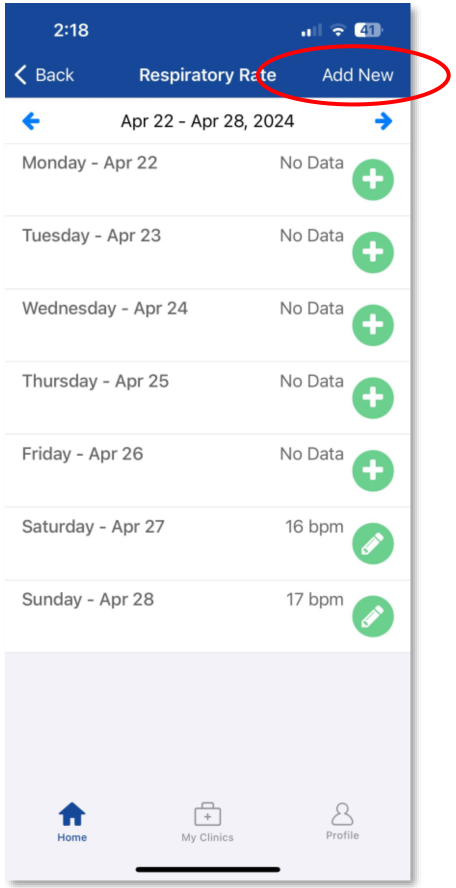
Editing Manually Logged Readings



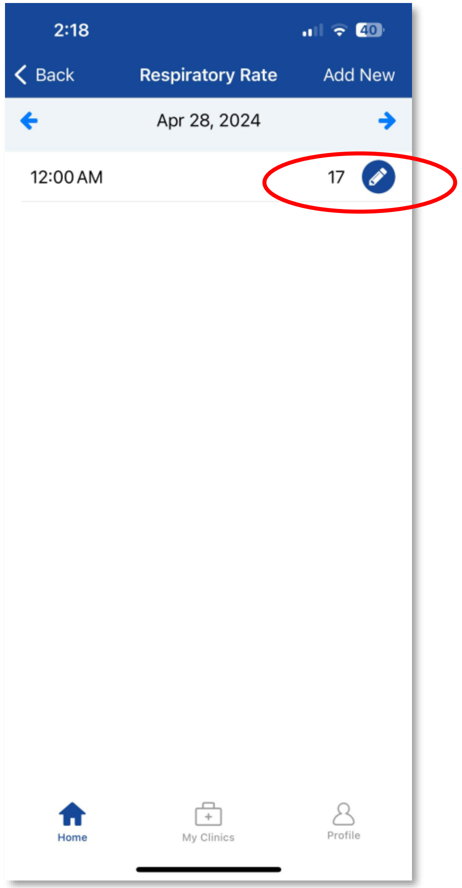
Tap on the icon of the measurement to view a detailed list of readings



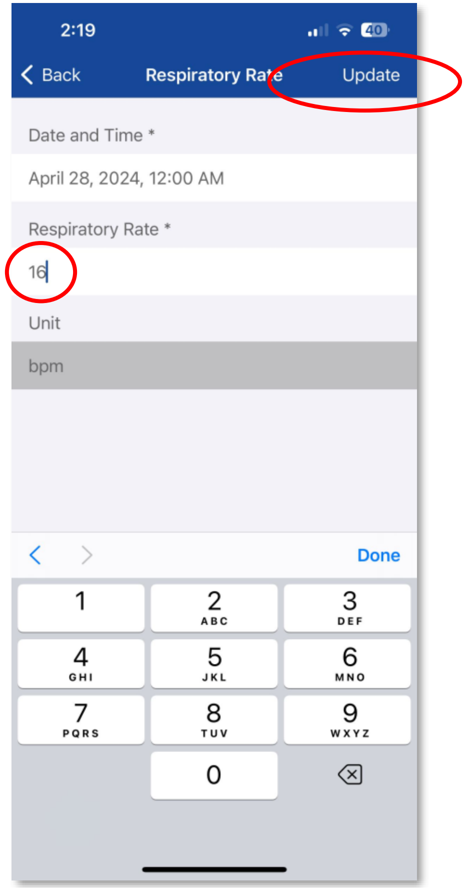
Tap **Log Data**



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.

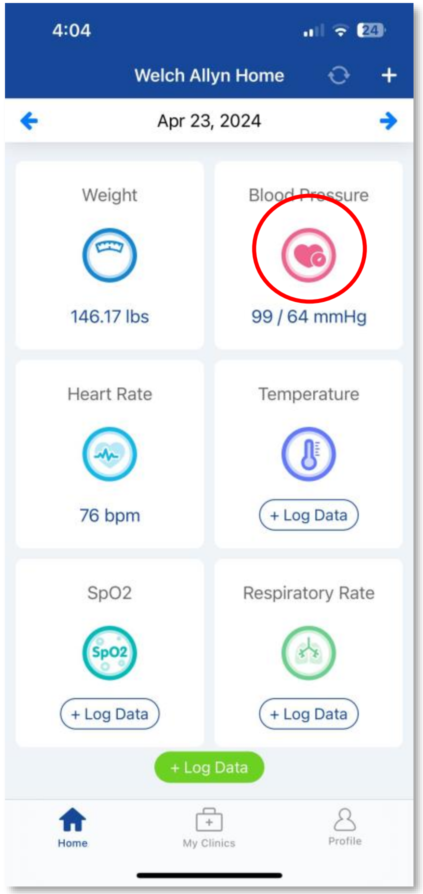
Tap **Update**

Note: Manually logged readings cannot be deleted on the app

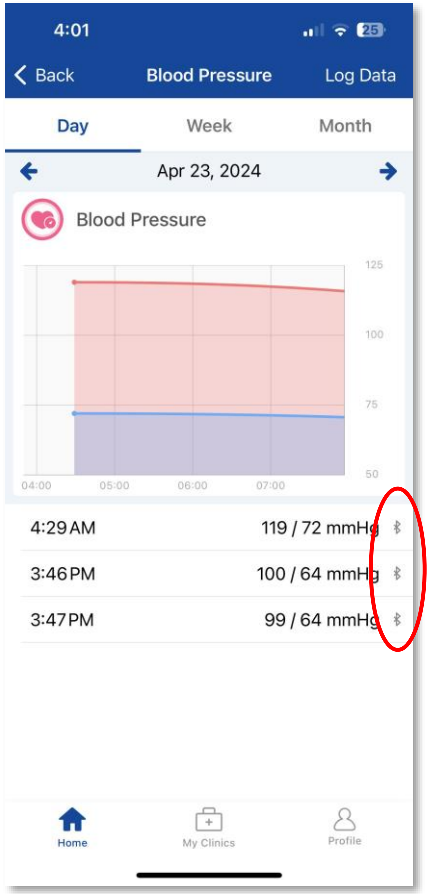
Welch Allyn Home

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

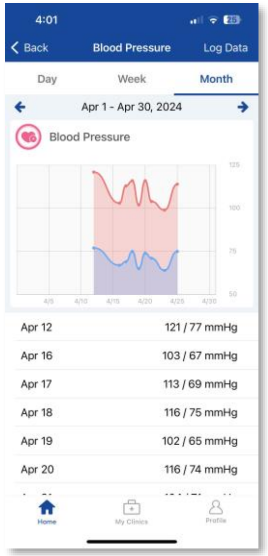


Tap on the icon of the measurement to view a detailed list of readings

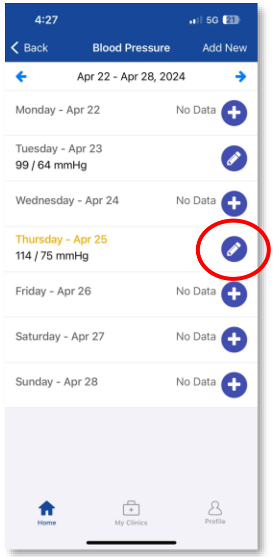


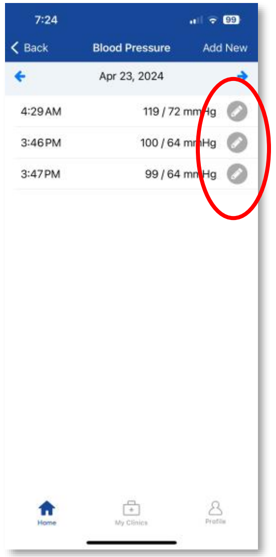
Tap **Day**

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





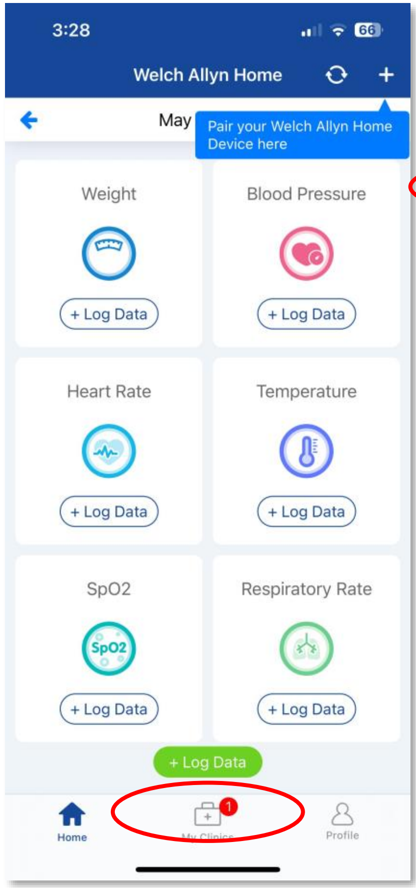
Though the pencil icon is not grayed out and clickable at first, the next screen where readings for the day are displayed would not let the patient edit the synced reading.

Welch Allyn Home

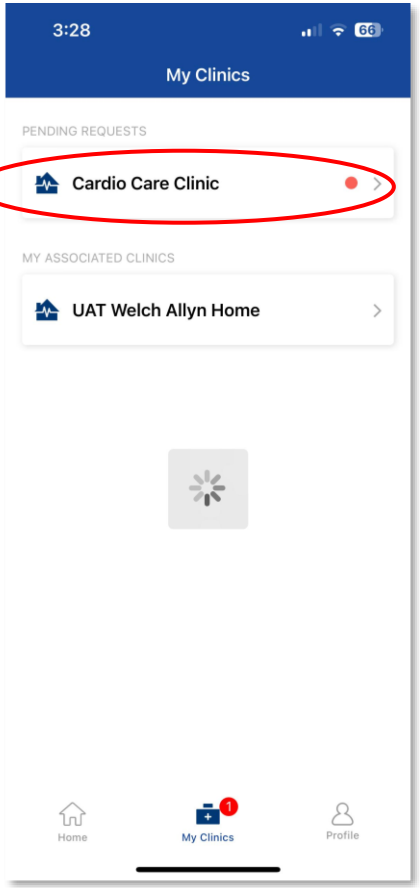
Accepting a Follower

- 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.

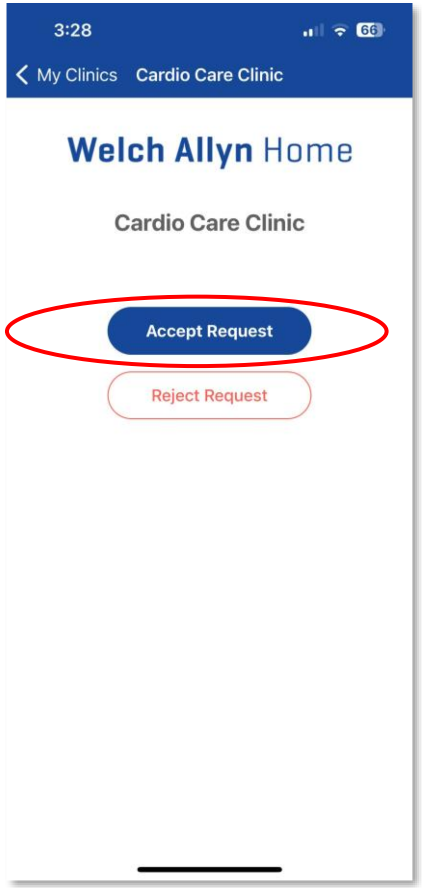


Tap **My Clinics** that has the notification icon (red circle with number)

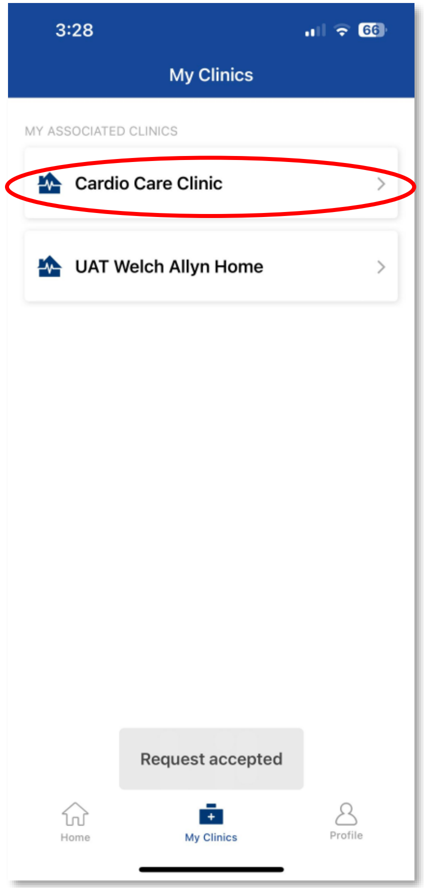


The **My Clinics** screen appears.

Tap the name of the Clinic under Pending Requests



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

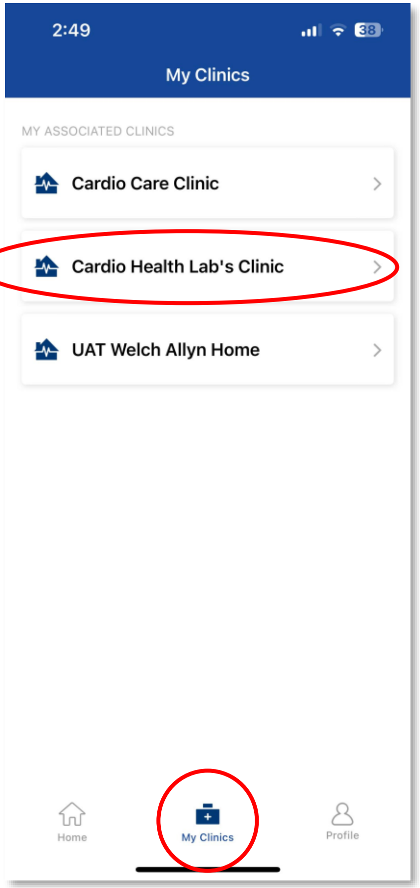


The name of the Clinic that was allowed to view the Patient's progress will show under My Clinics.

Welch Allyn Home

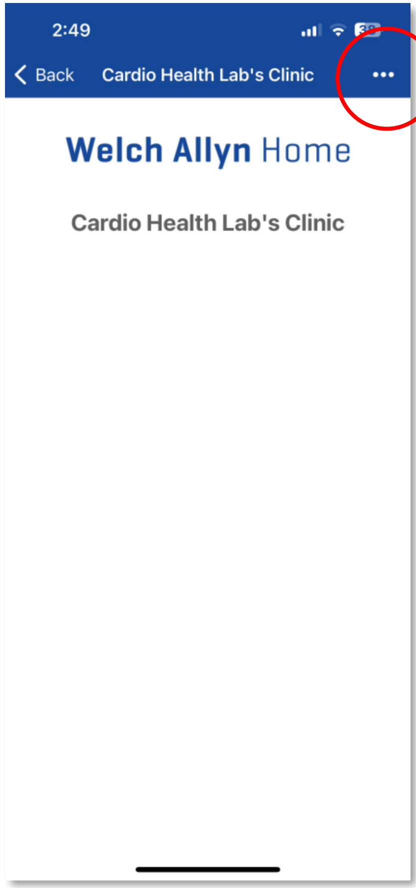
Unsubscribing a Follower

- 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



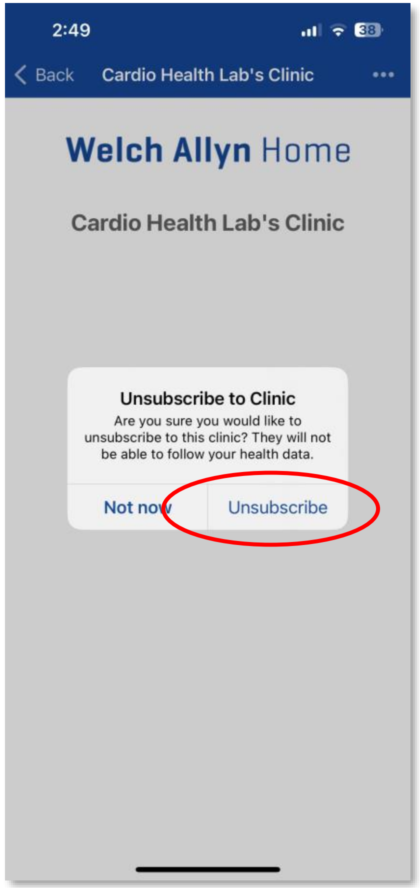
Tap the **My Clinics**

Tap the name of the Clinic to unsubscribe to



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

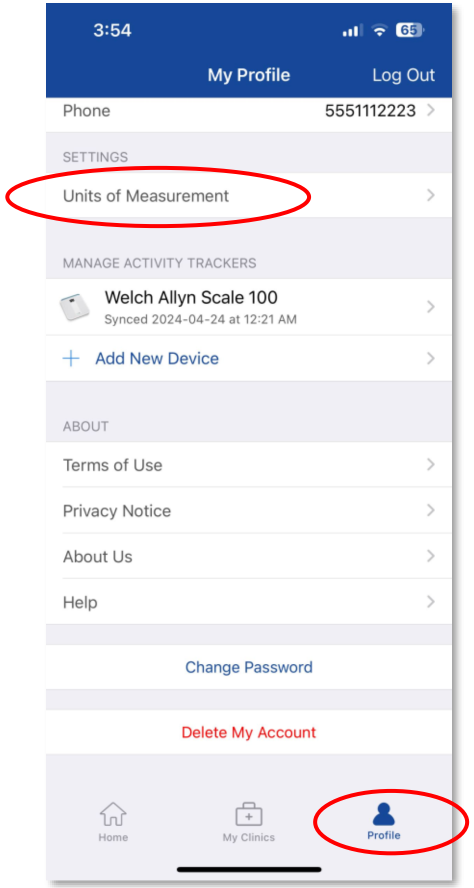
Tap **Unsubscribe**



Tap **Unsubscribe** to confirm.

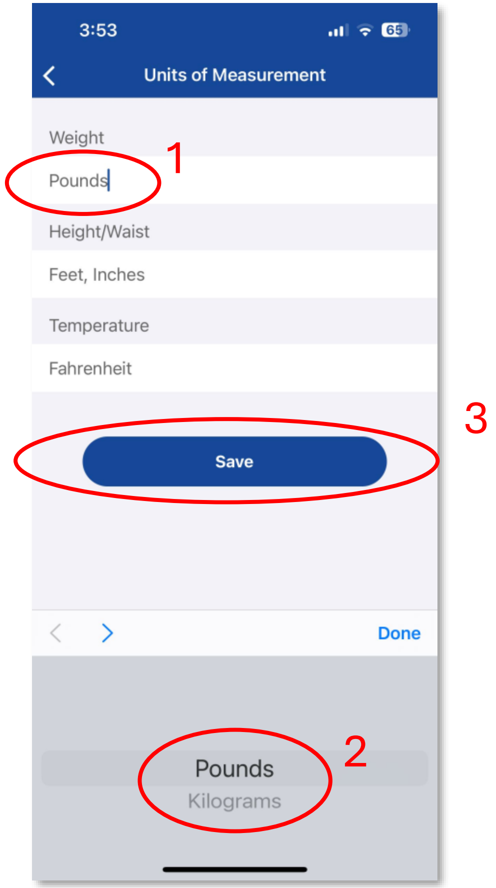
The Clinic will no longer see the Patient's data

Changing Units of Measure



Tap the **Profile** icon

Scroll down and tap **Units of Measurement**

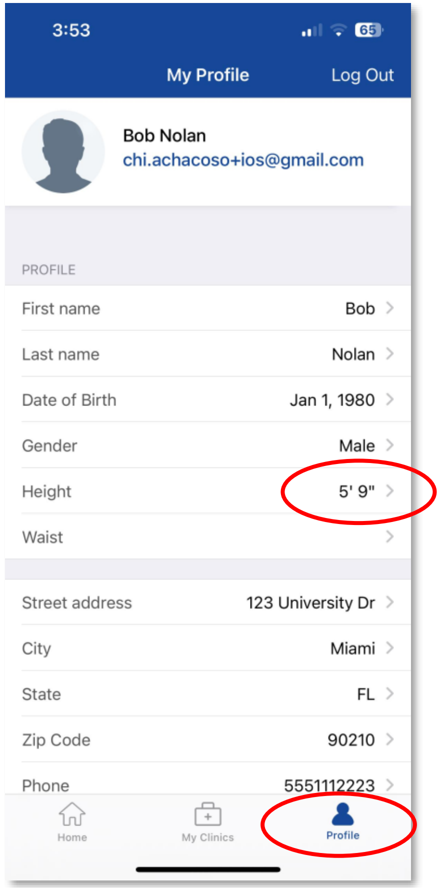


Tap any of the entries to change the units of measure

Tap the desired unit of measurement

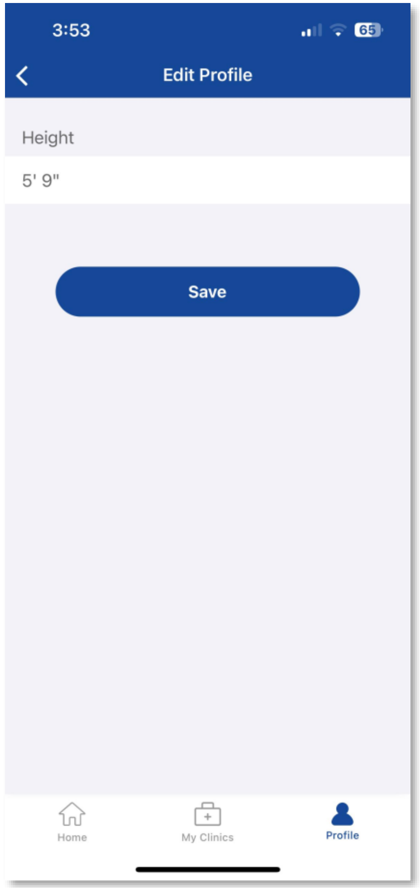
Tap **Save**

Editing a Profile



Tap the **Profile** icon

Tap the field to edit

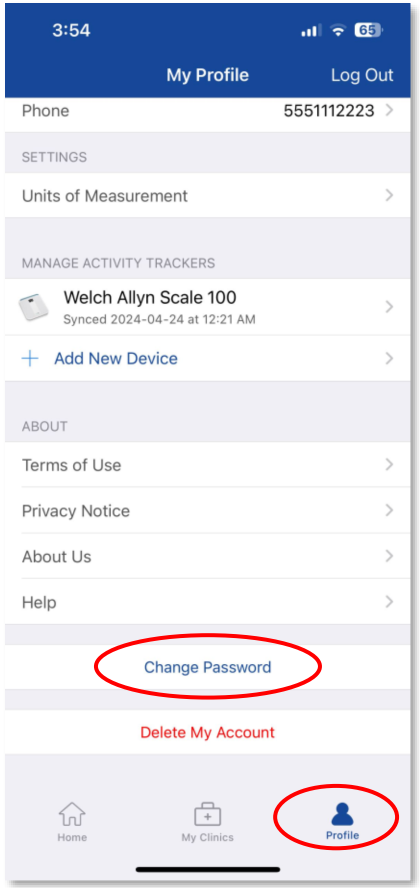


Make necessary changes

Tap **Save**

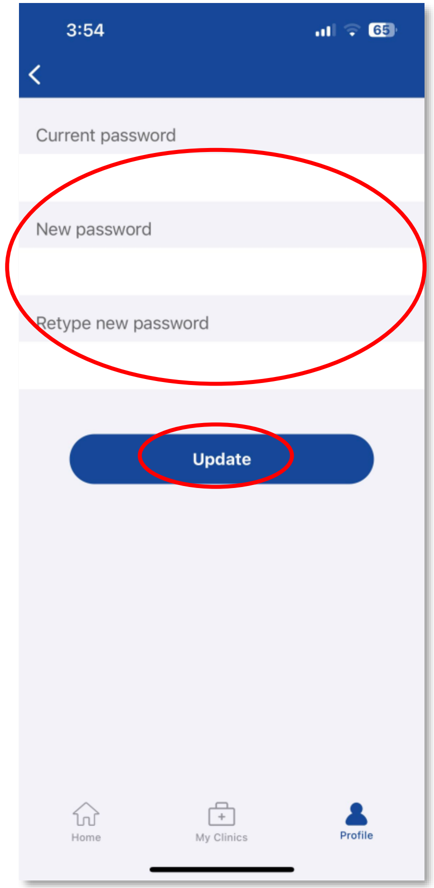
Welch Allyn Home

Changing a Password



Tap the **Profile** icon

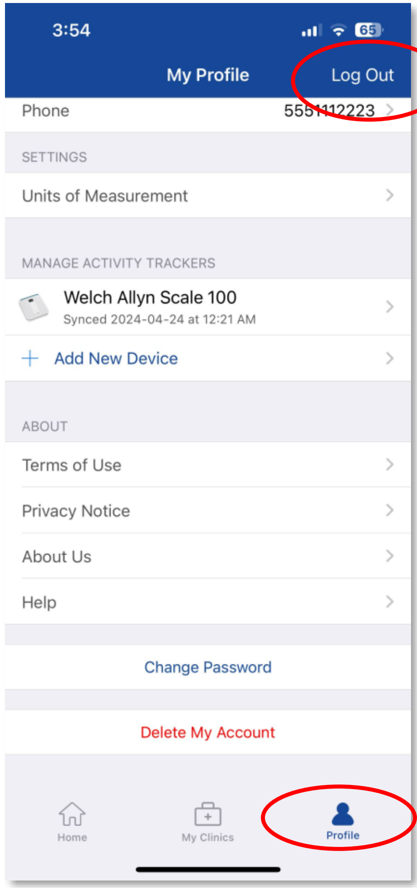
Tap **Change Password**



Type and retype a new password

Tap **Update**

Logging Out of the App

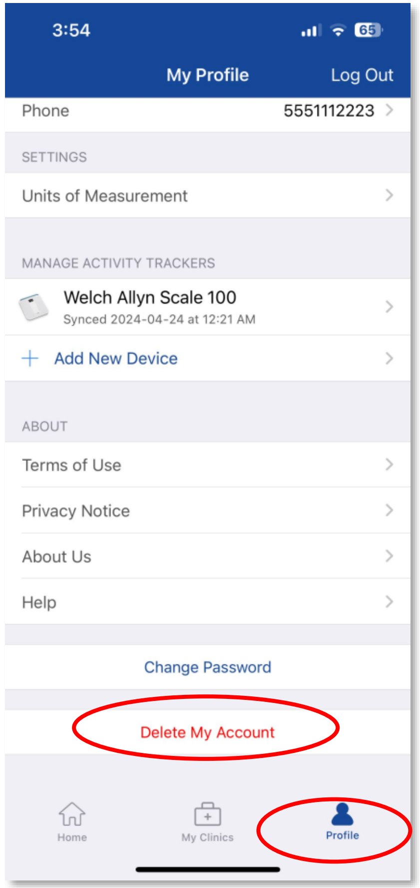


Tap the **Profile** icon

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

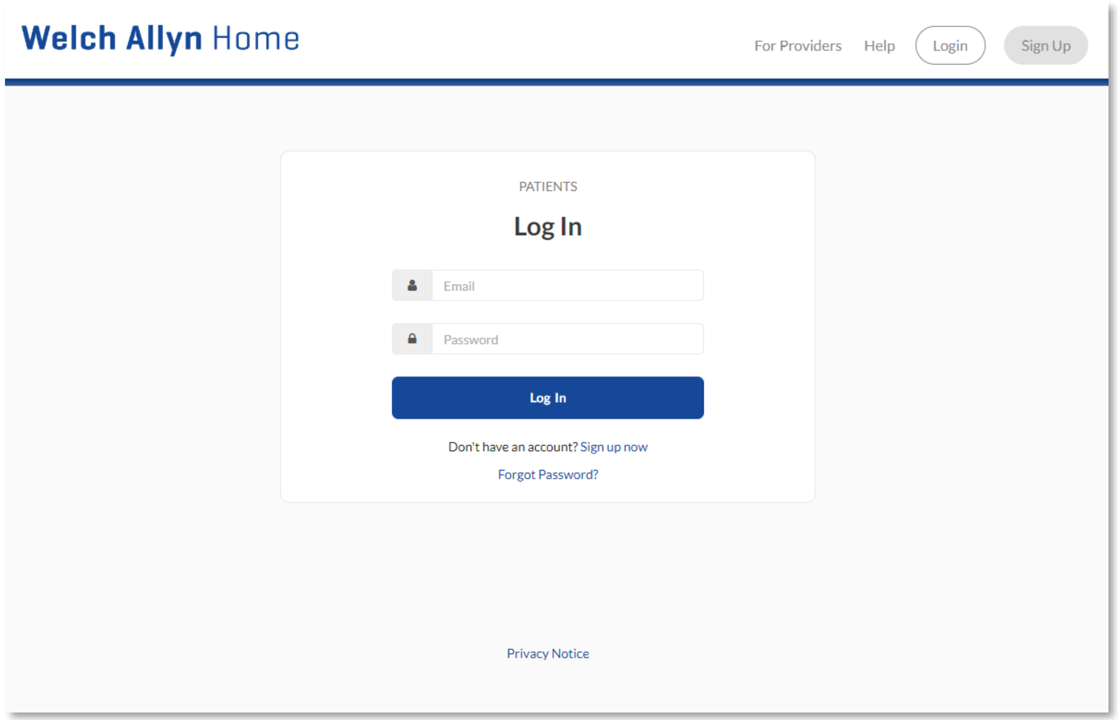
Tap the **Sync All** icon

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

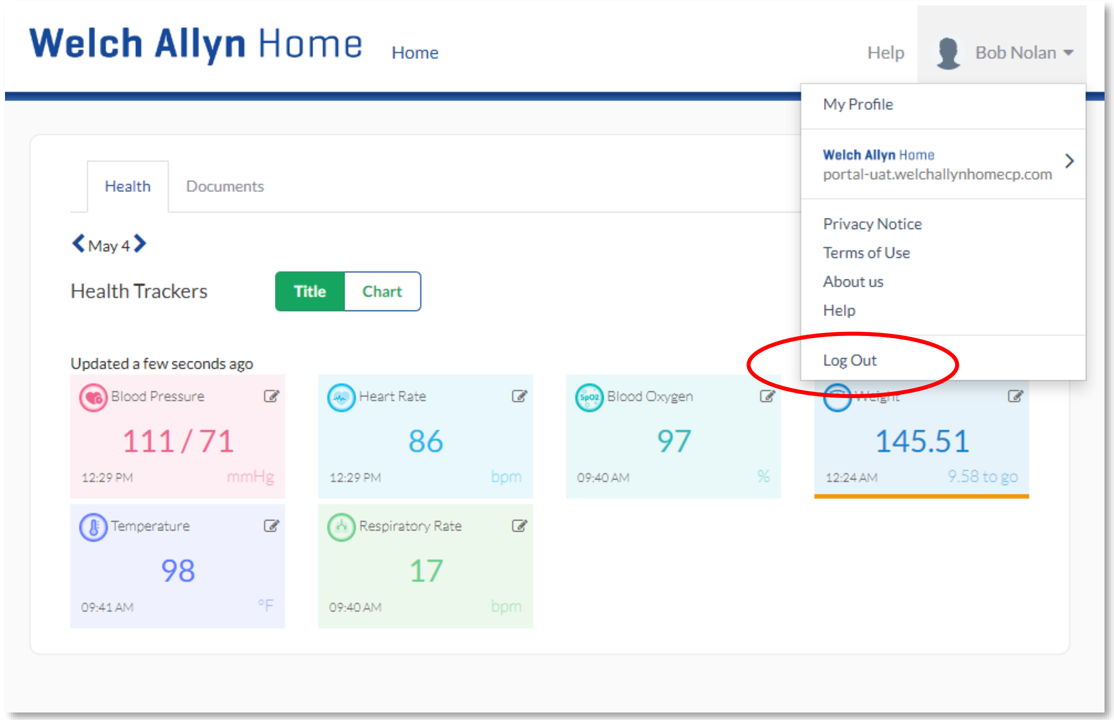
Logging In



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

Click **Log In**

Logging Out



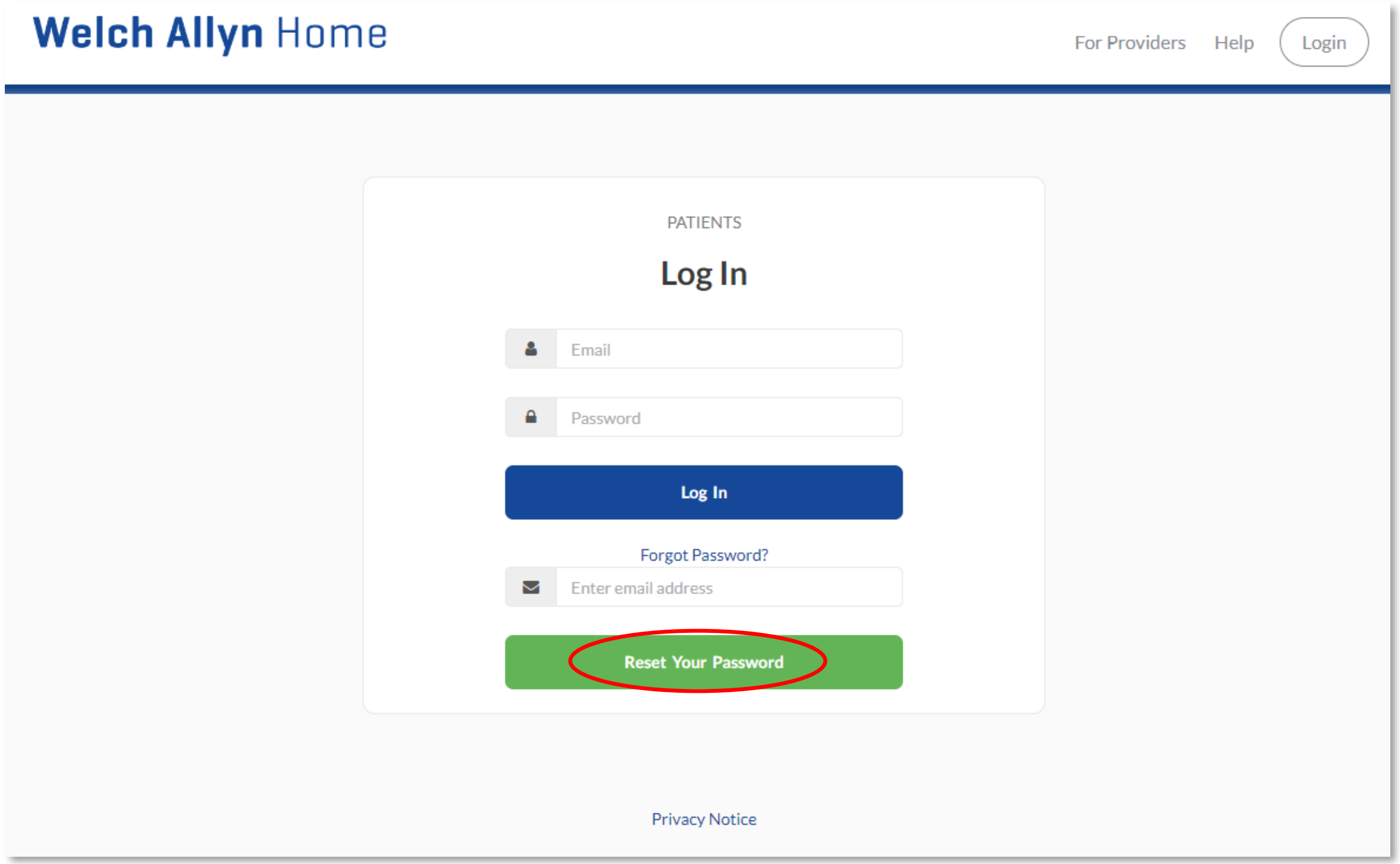
Click the user's name on the right side of the menu bar

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.

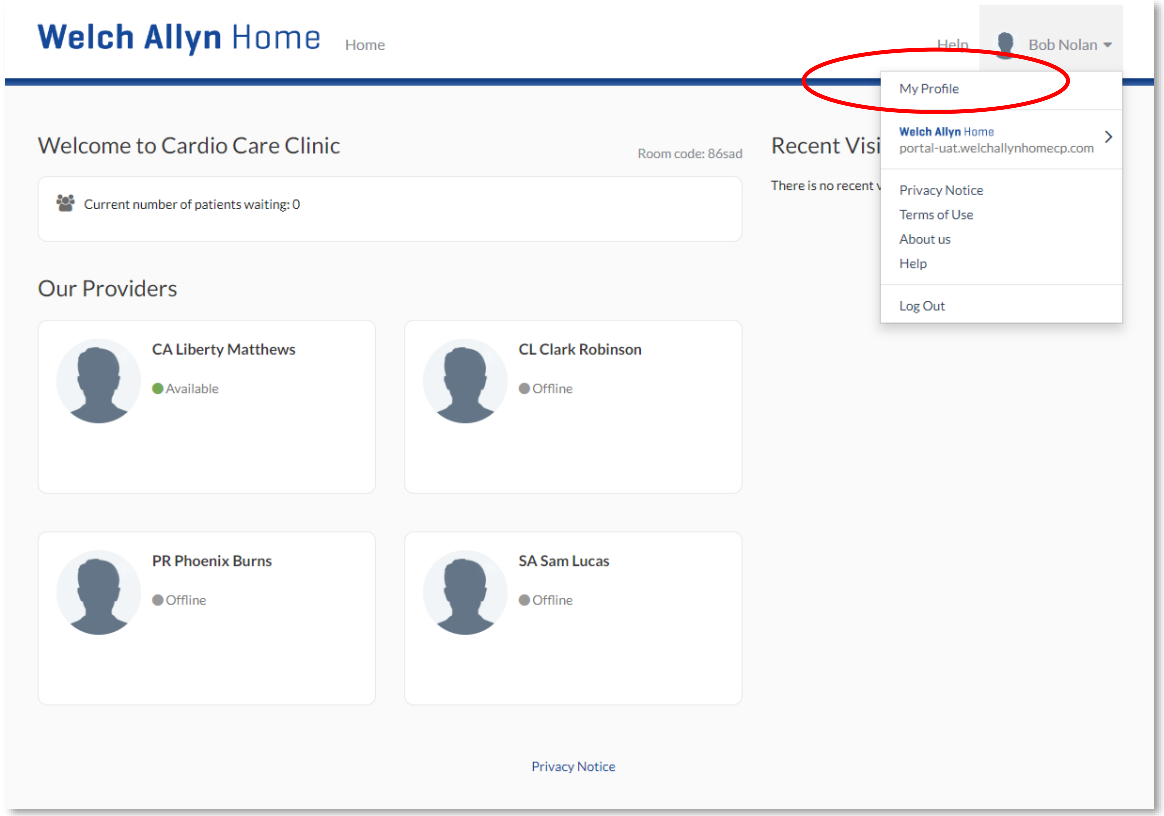


Enter the email address on the box under Forgot Password?

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.

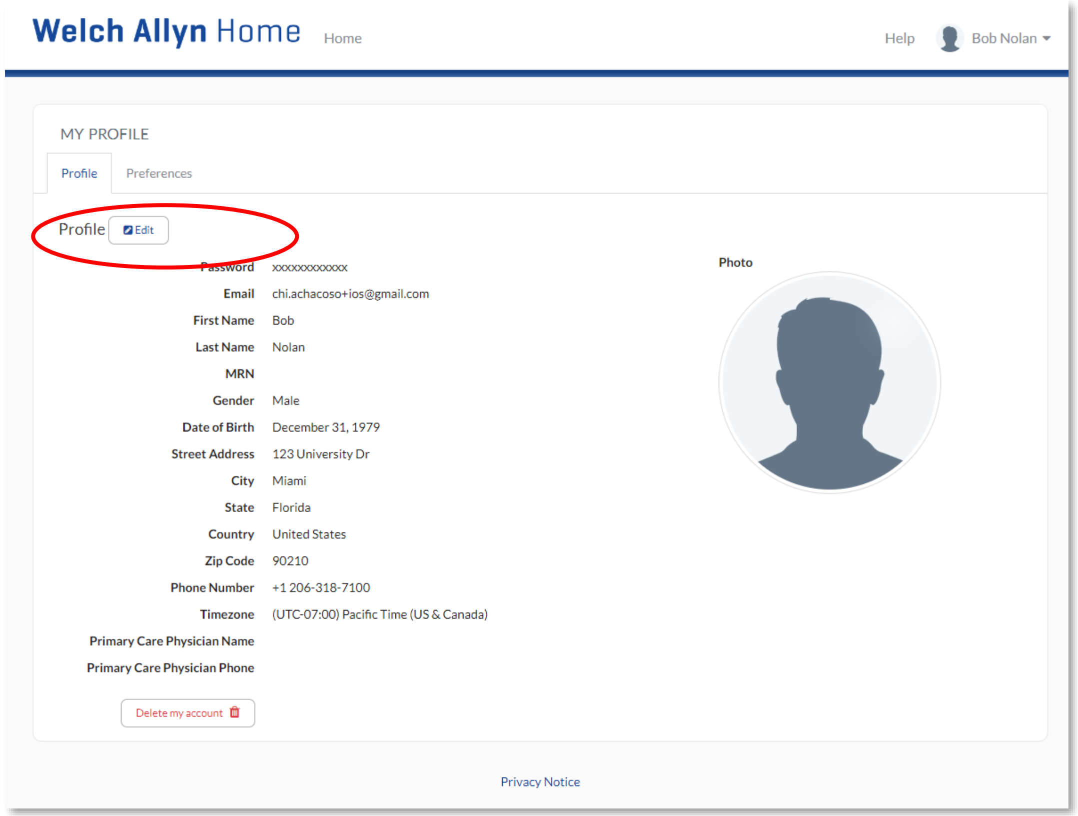


Click the user's name on the right side of the menu bar

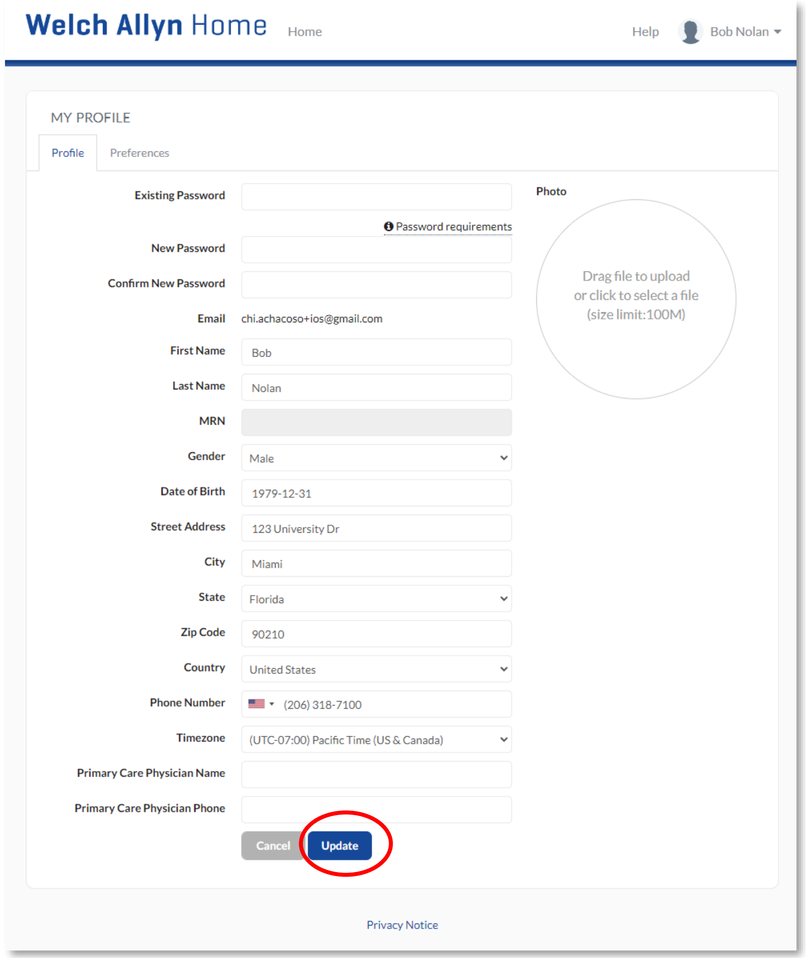
Click **My profile**

*Continued on the next page >

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



Click **Edit**

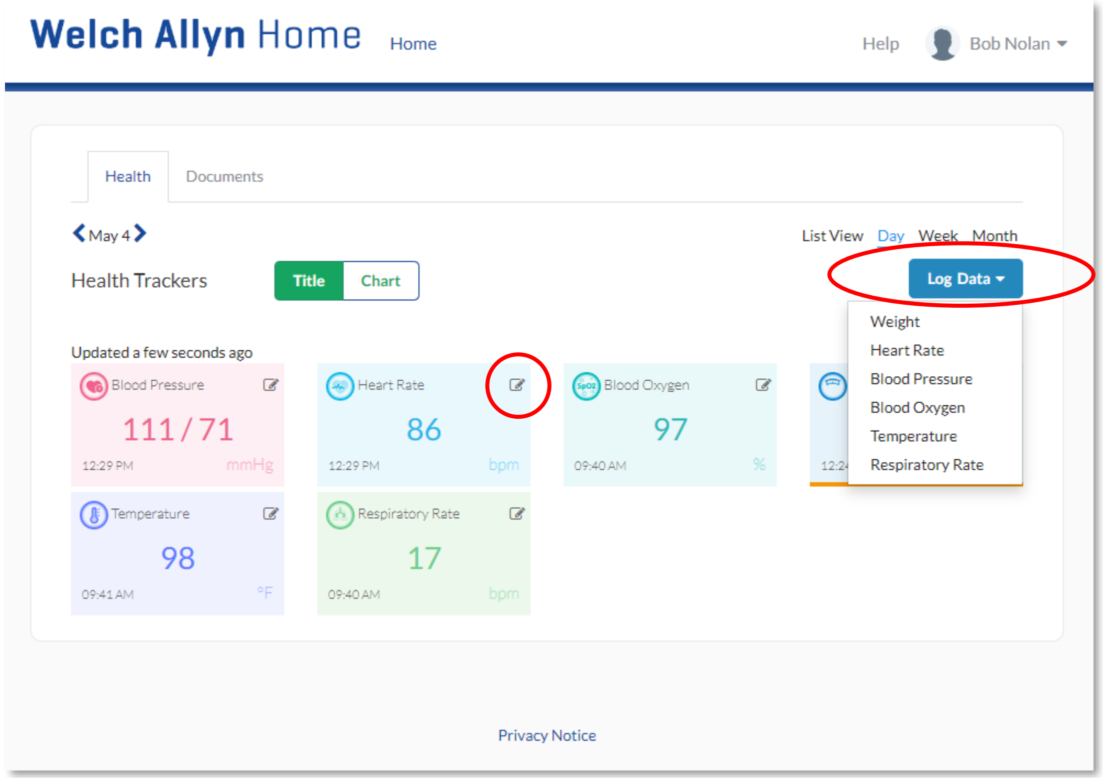


Update password and/or update the profile information

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

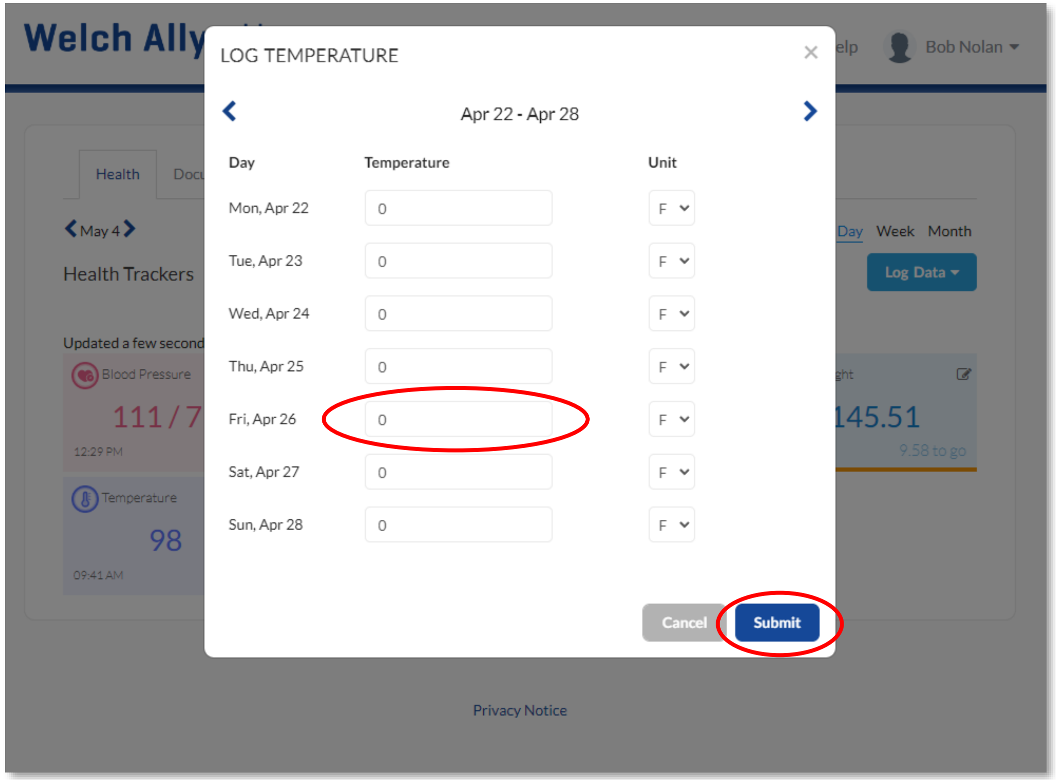


2 Options:

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

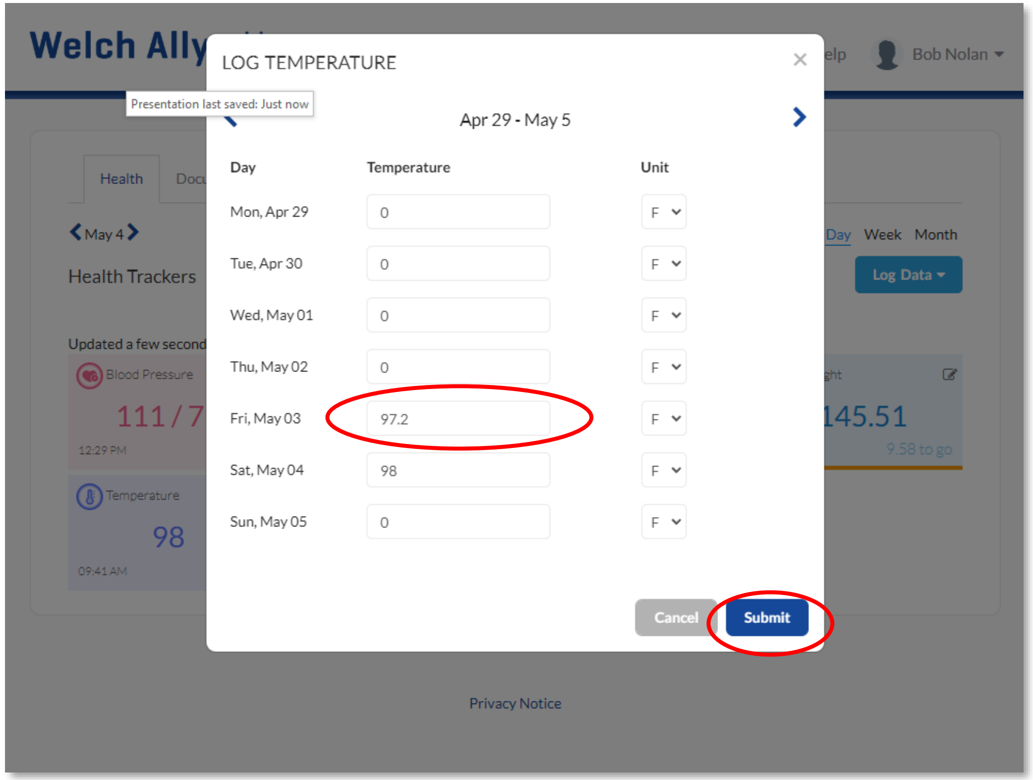
Manually logging a new reading



Enter the reading

Click **Submit**

Editing/Deleting an existing reading

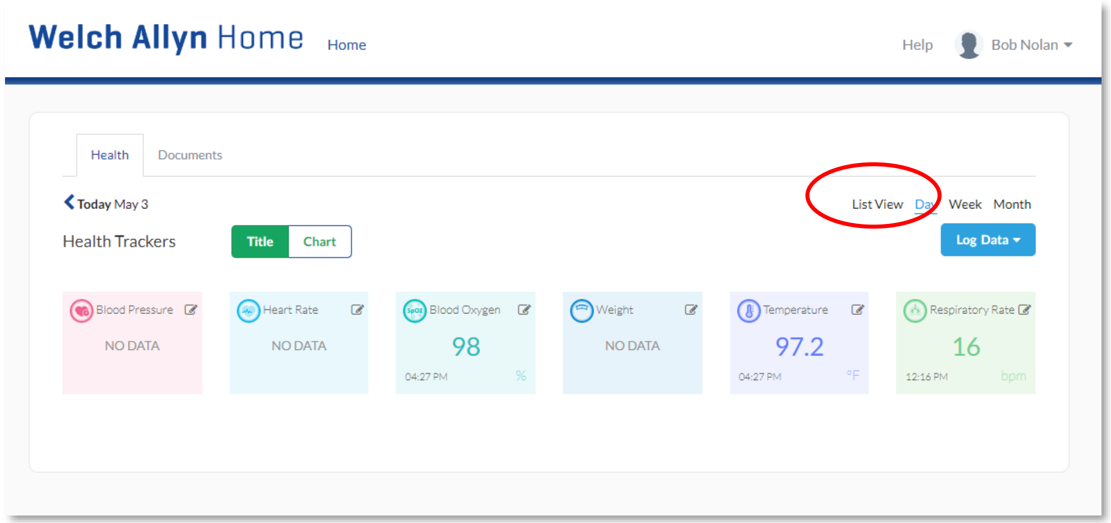


Edit / Erase the reading

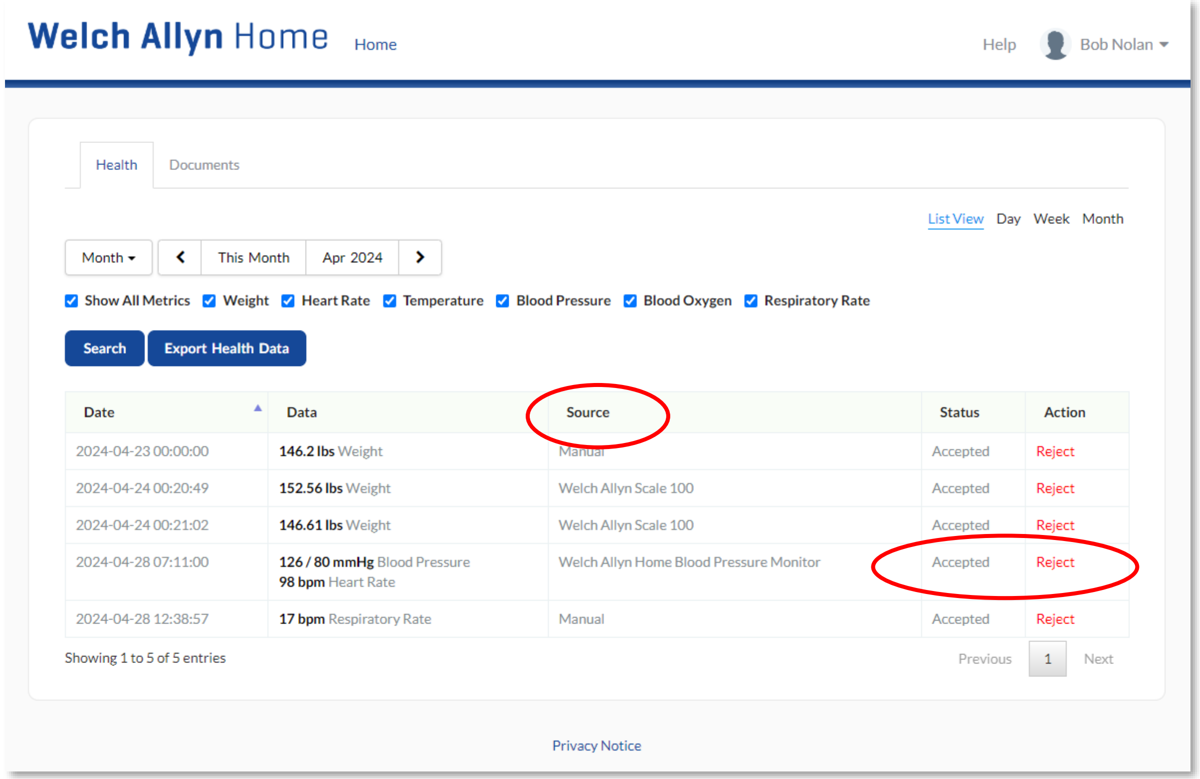
Click **Submit**

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**

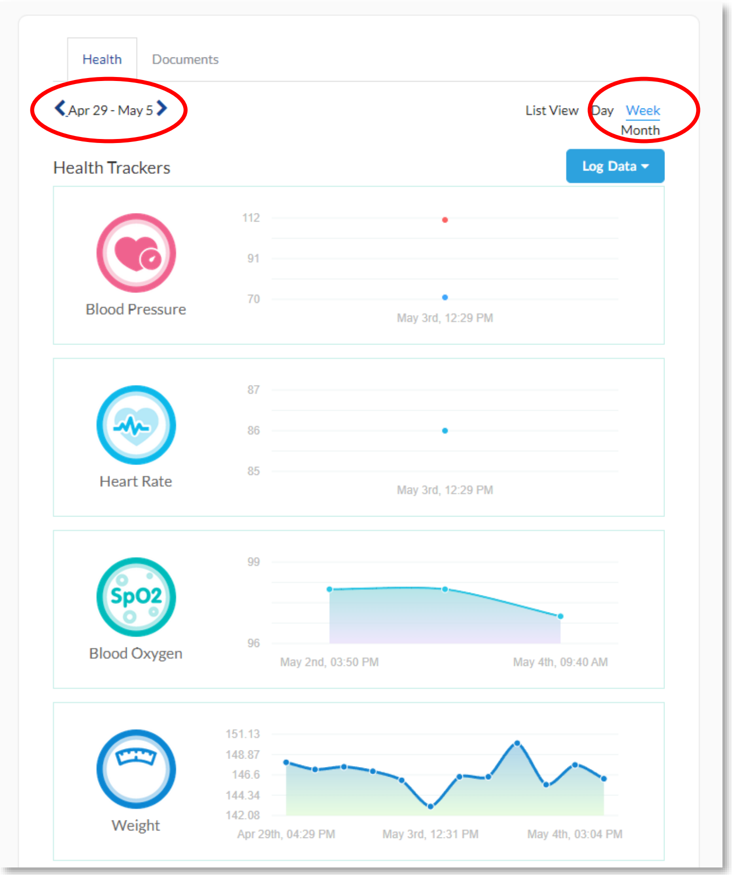


- A reading's source would display whether it was synced or manually logged.
- Click **Accept/Reject**
- A rejected reading cannot be edited, unless accepted

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.

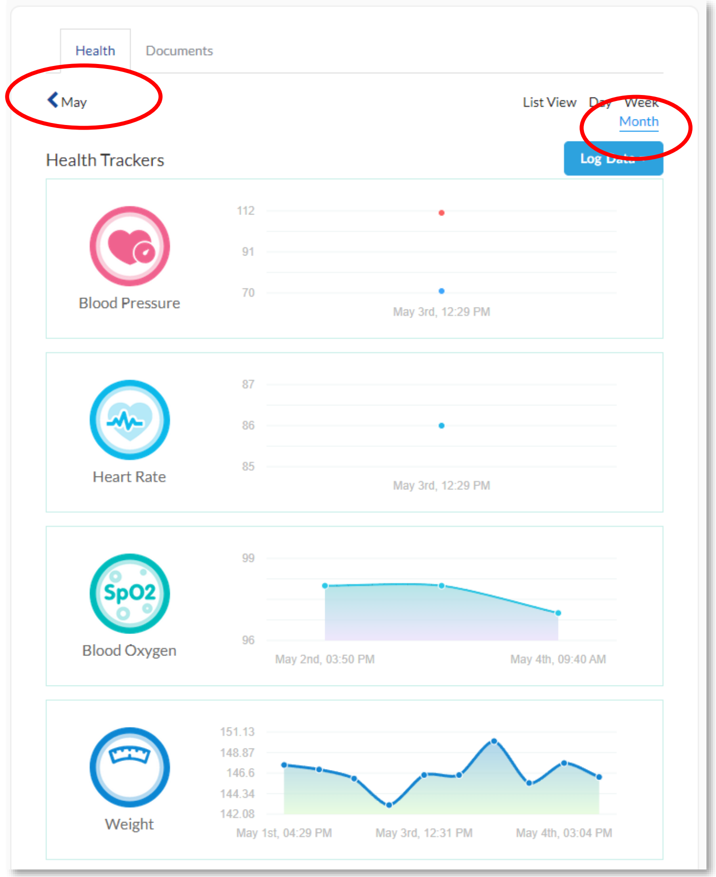
Week View



Tap **Week**

Scroll through the weeks by clicking the arrows

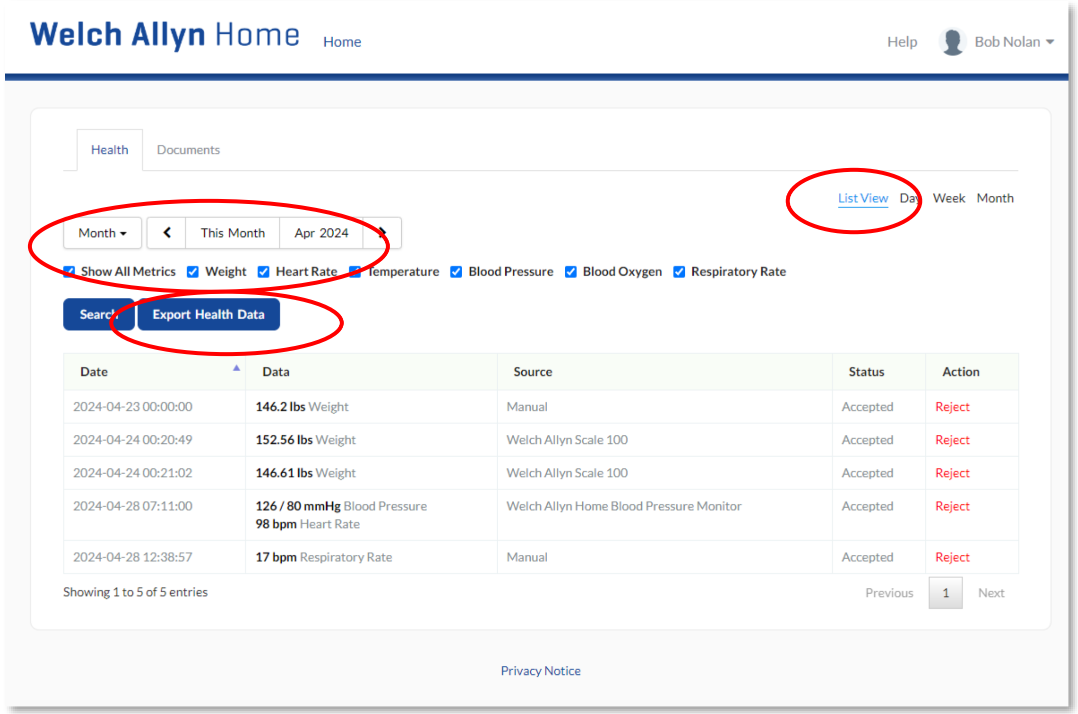
Month View



Tap **Month**

Scroll through the months by clicking the arrows

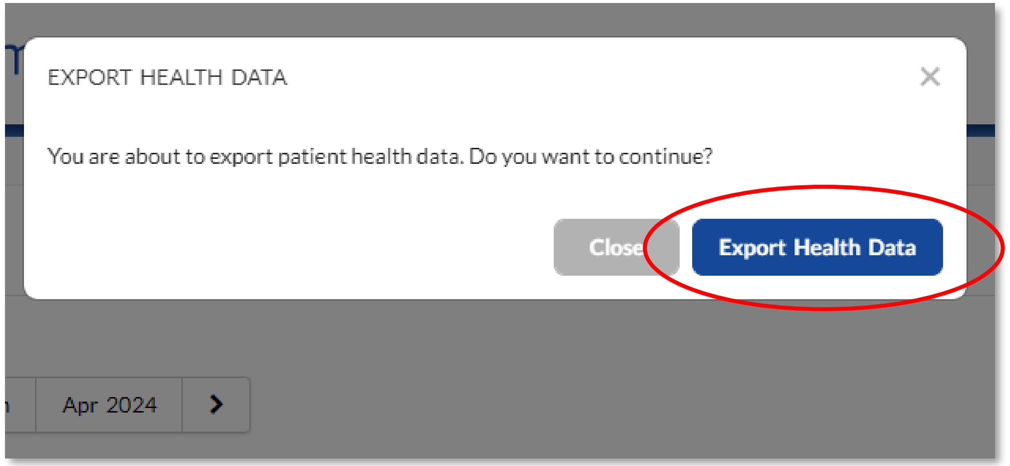
Exporting Health Readings



Click **List View**

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

Click **Export Health Data**

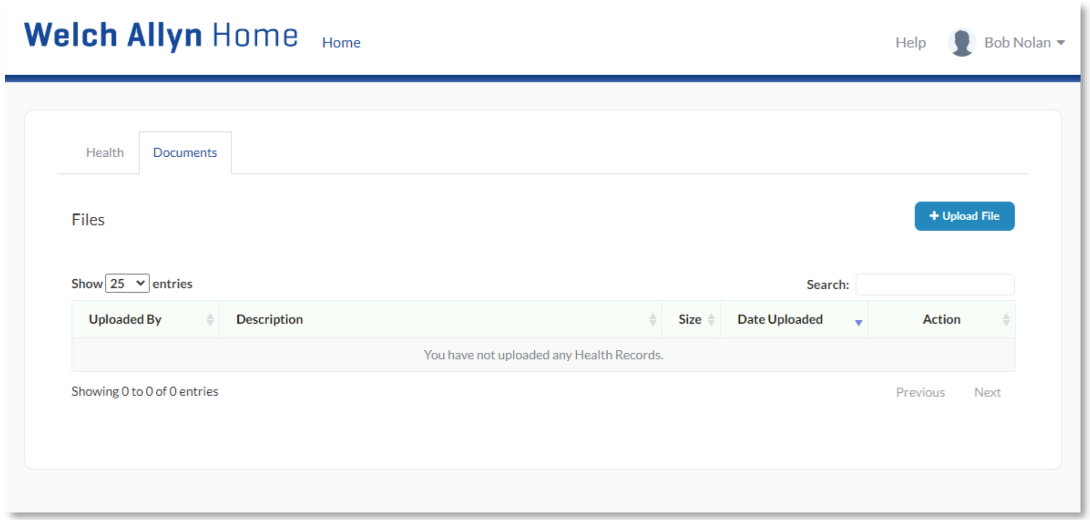


Click **Export Health Data** to confirm

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

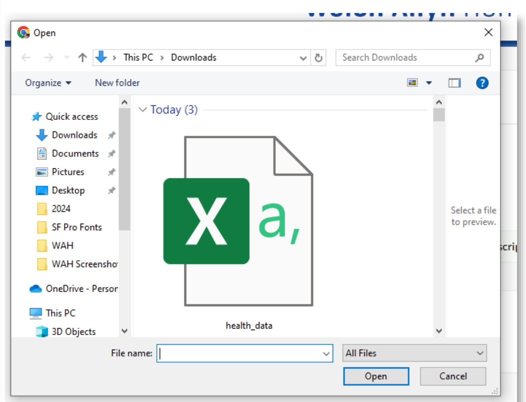
Uploading Files

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



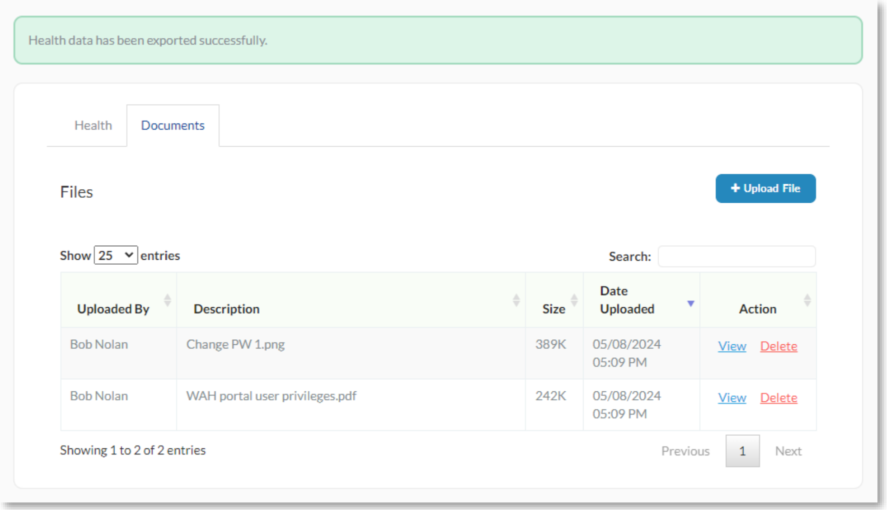
Click **Documents**

Click **+Upload File**



Select the file to share

Click Open

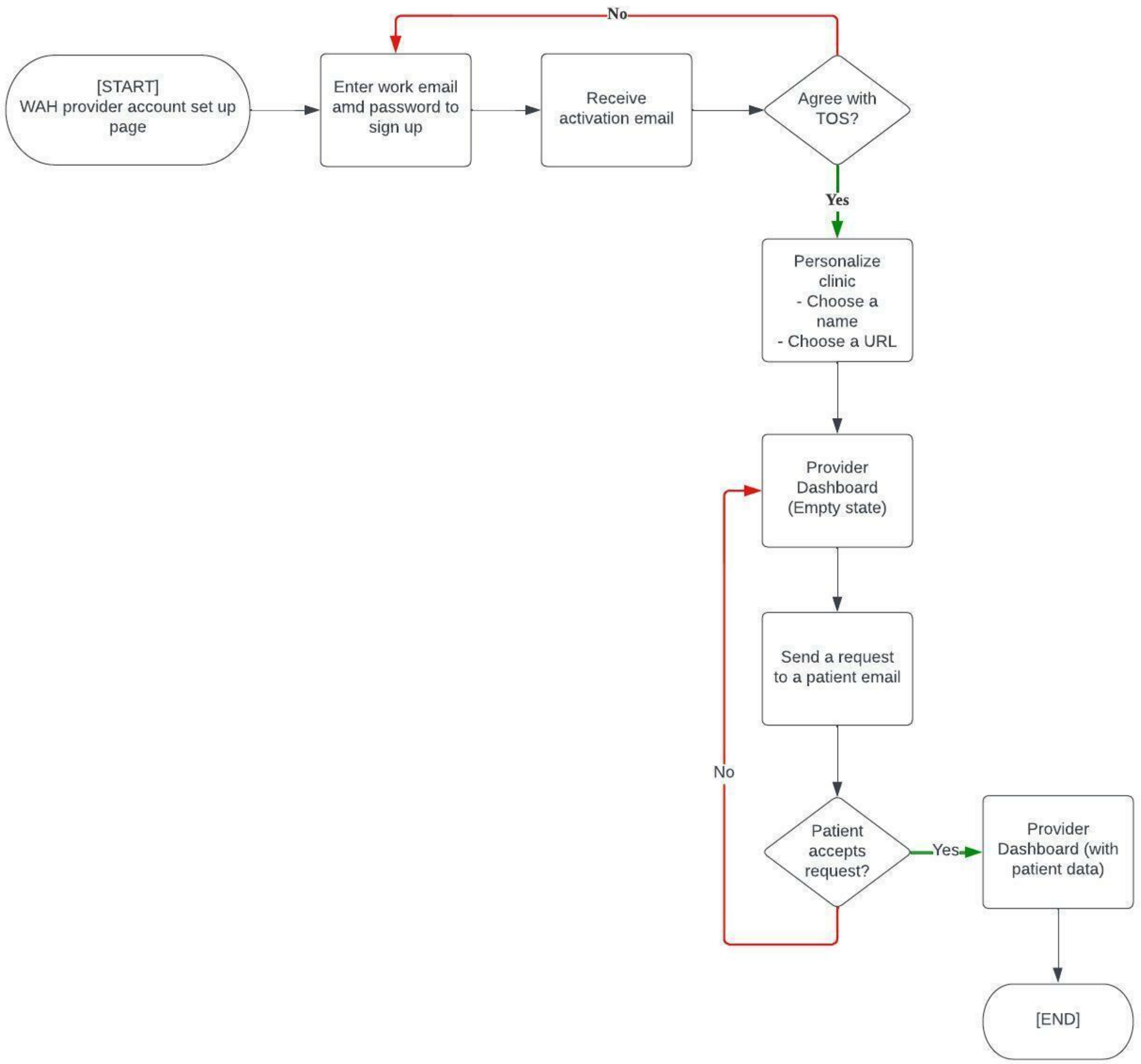


Click **Documents**

Click **+Upload File**

Clinician / Provider

Clinician/ Provider Journey



Welch Allyn Home

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

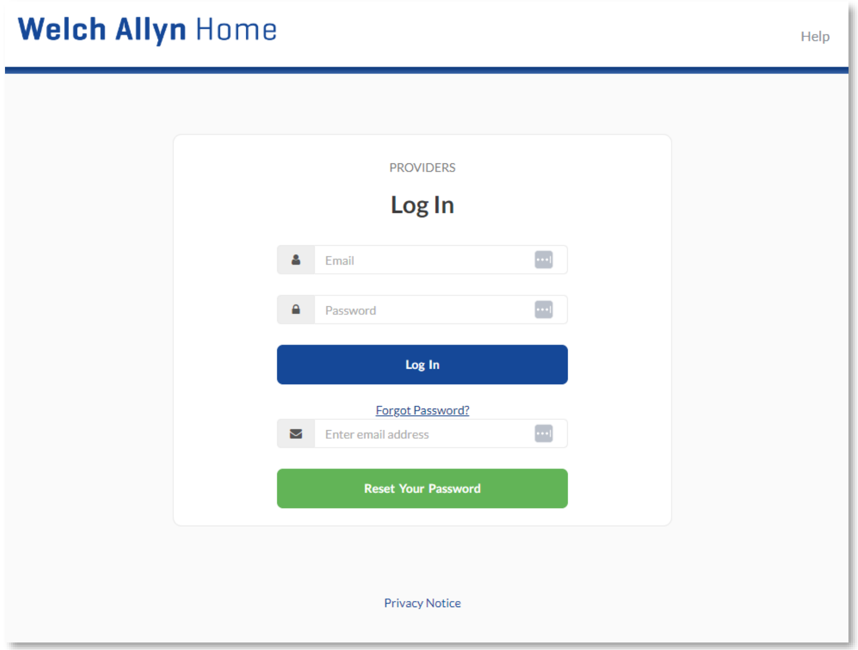
Functions	Clinician	Provider
Actions on Health Data		
Manually Enter Health Data	X	X
Edit and delete health data that was added manually	X	X
Manage clinic risk range settings	-	-
Manage provider risk range settings	X	X
Manage custom patient specific risk range settings	X	X
Manage provider risk range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

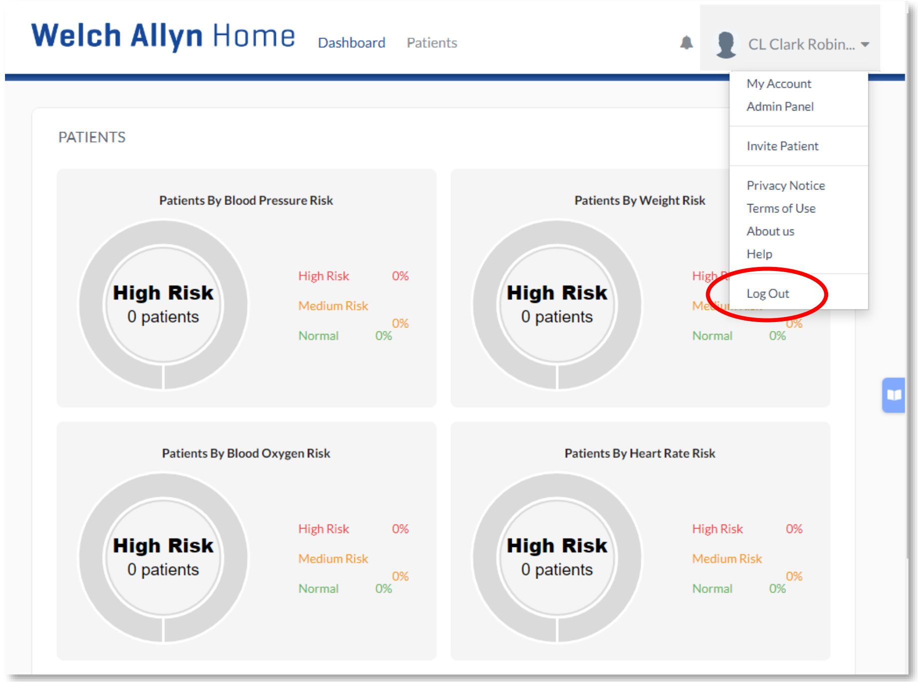
Welch Allyn Home

Logging in and logging out



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

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



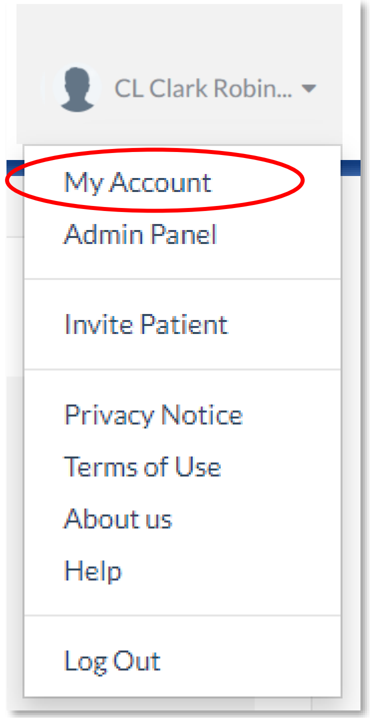
Click Profile Menu on the far right of the menu bar and click **Log out.**

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

Changing Password in the Portal

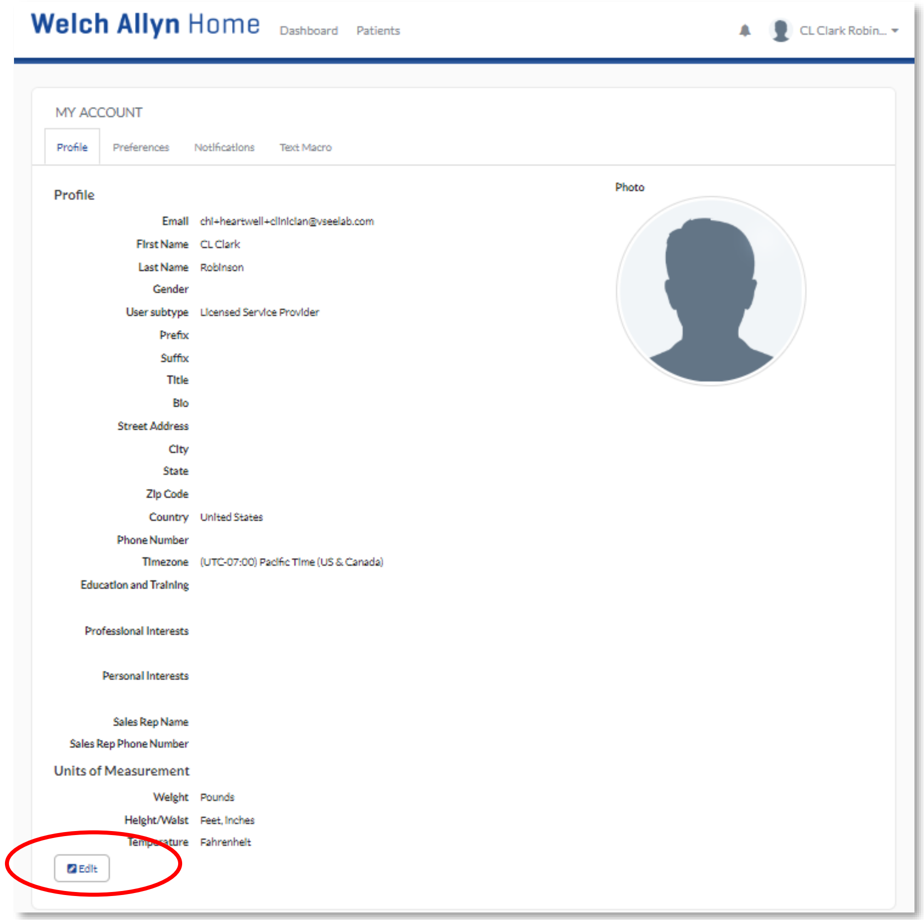
The user can also change their password once they have logged in the Clinic Portal.

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



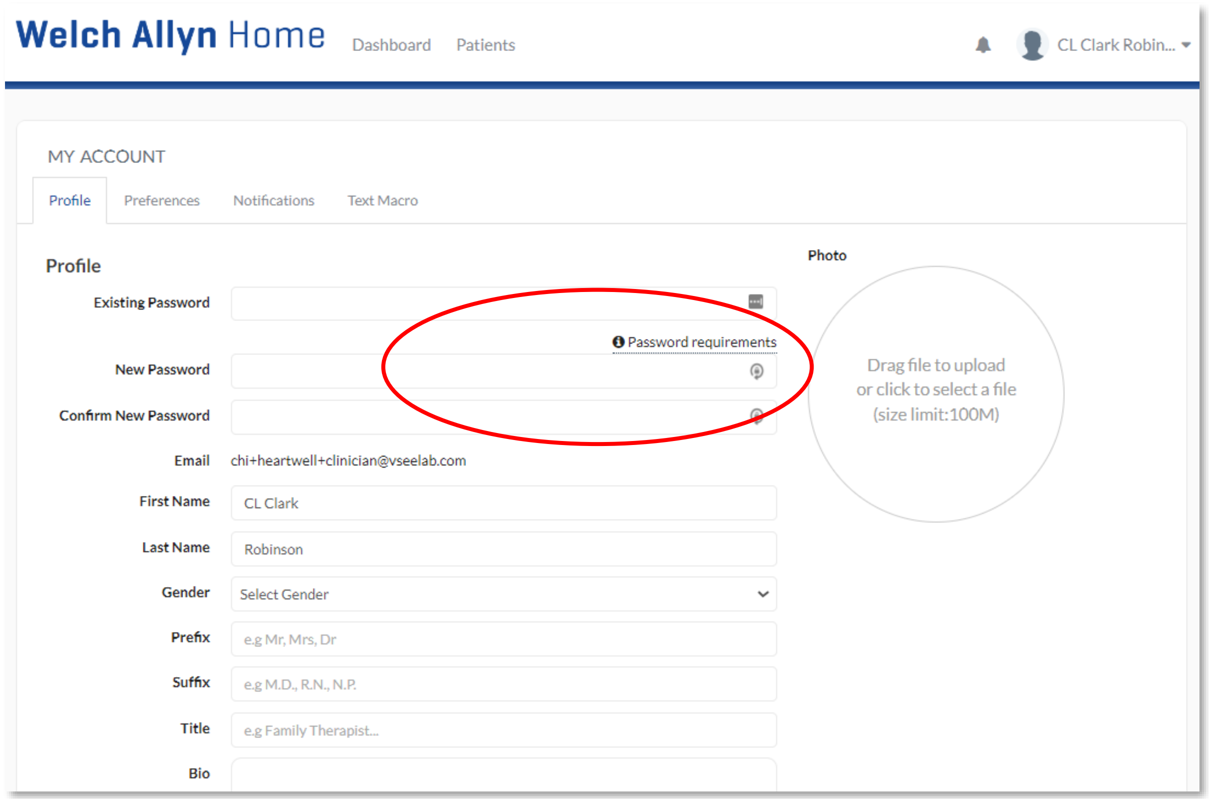
Click name on the right side of the menu bar.

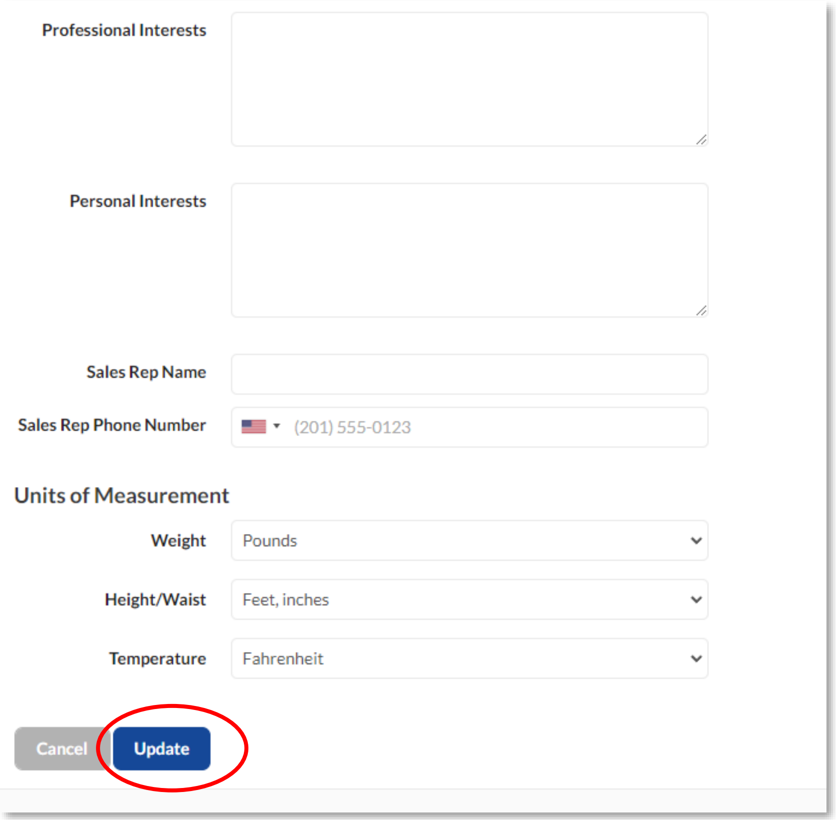
Click **My Account**.



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

Changing Password in the Portal – Cont'd





Scroll down

Click **Update** to save the changes

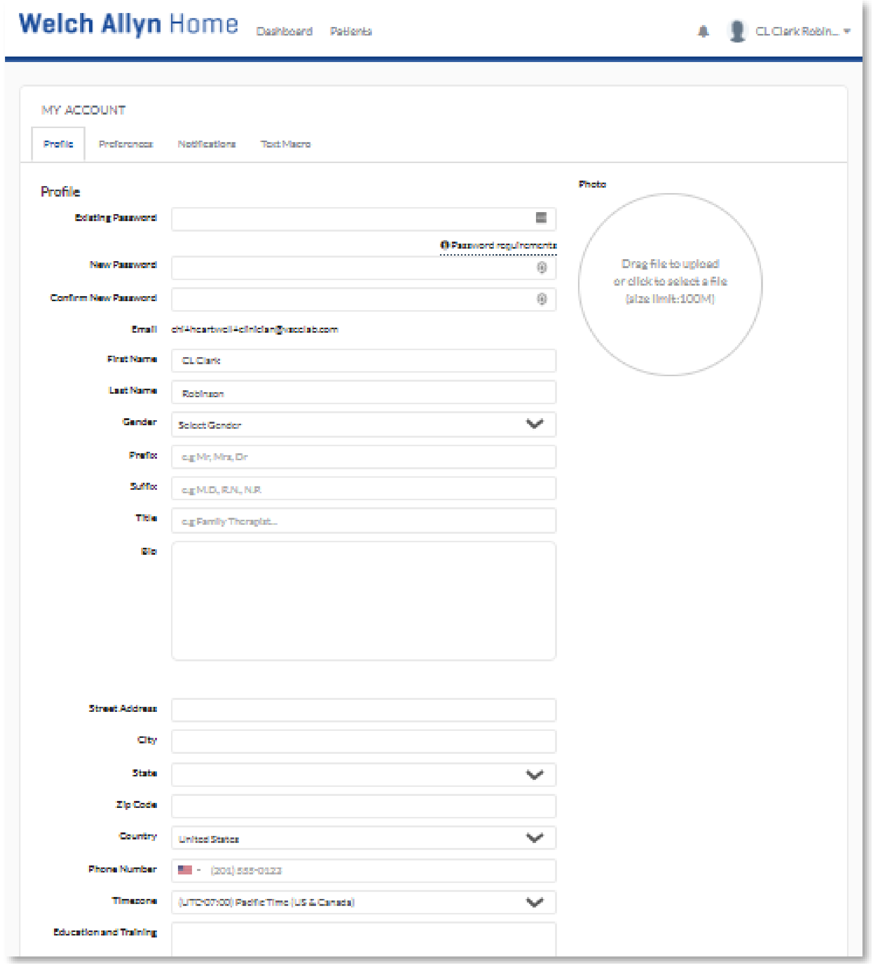
Changing the User Profile

Profile information can be updated.

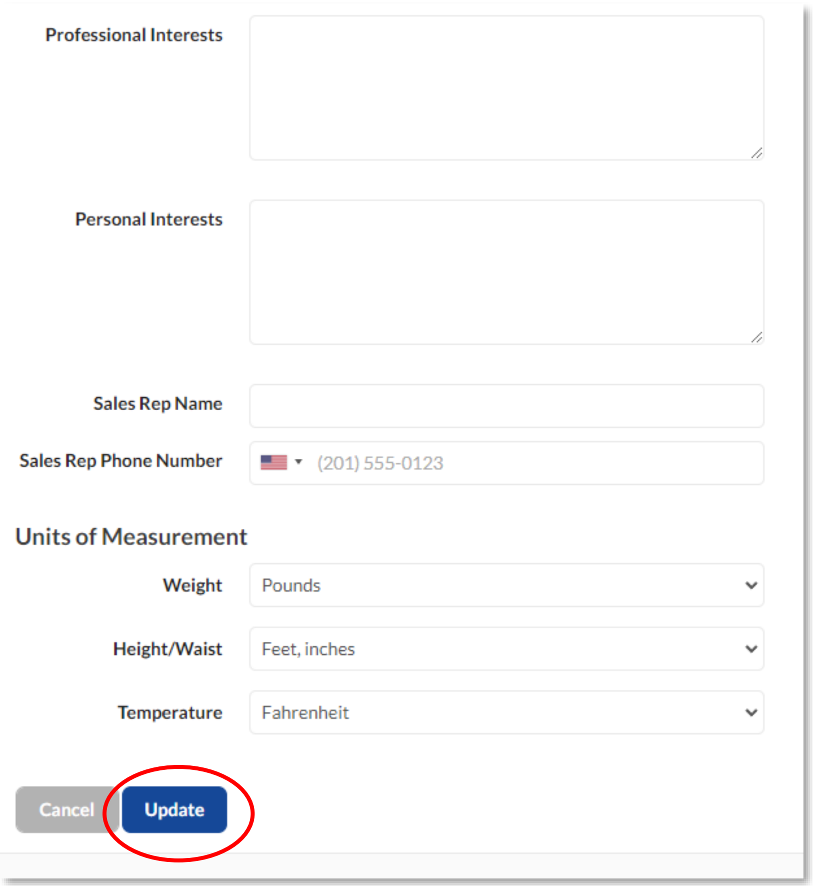
Follow the same initial steps on changing the password in the portal:

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

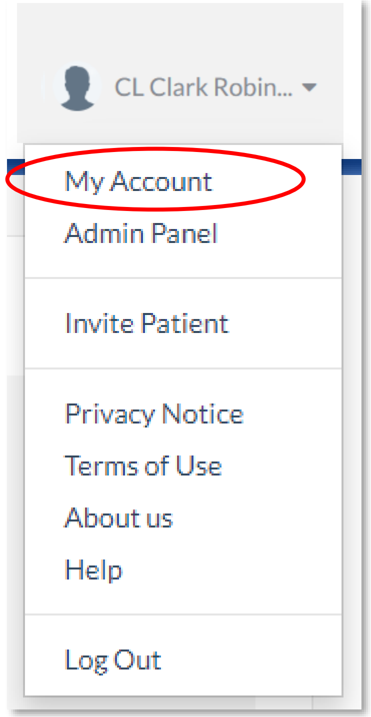


Click **Update** to save the changes

Welch Allyn Home

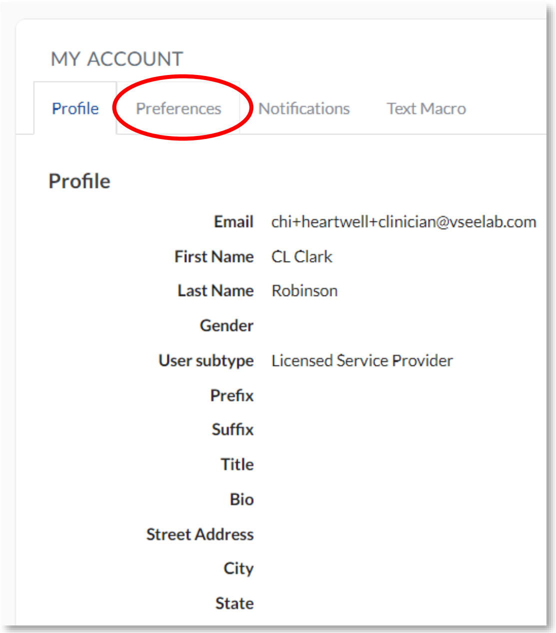
Revoking Consent to Participate in Surveys

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

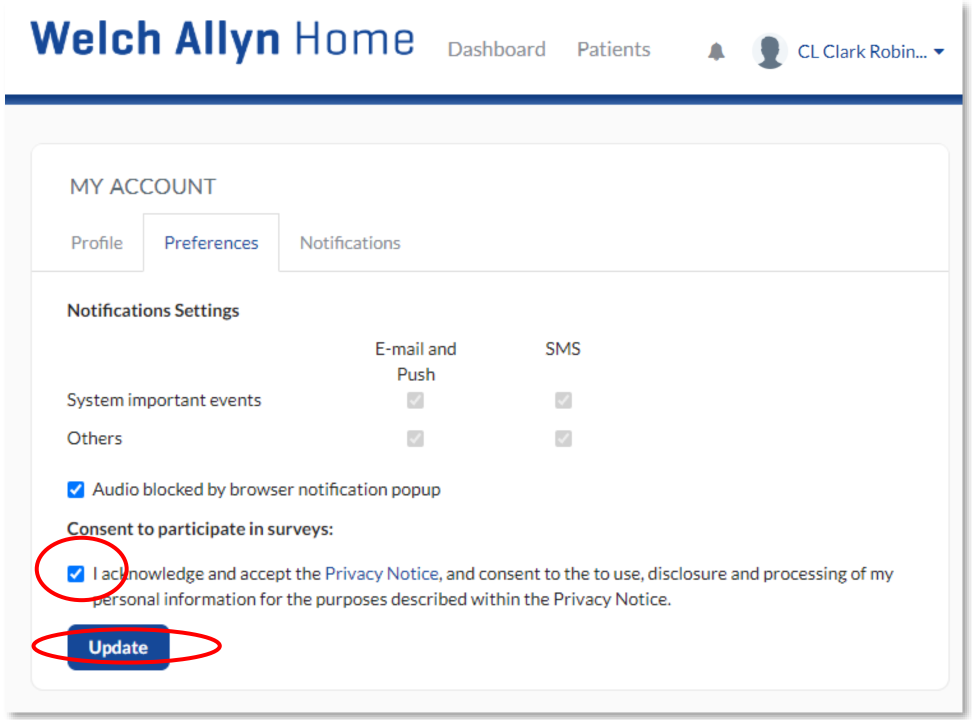


Click name on the right side of the menu bar.

Click **My Account**.



Click **Preferences**



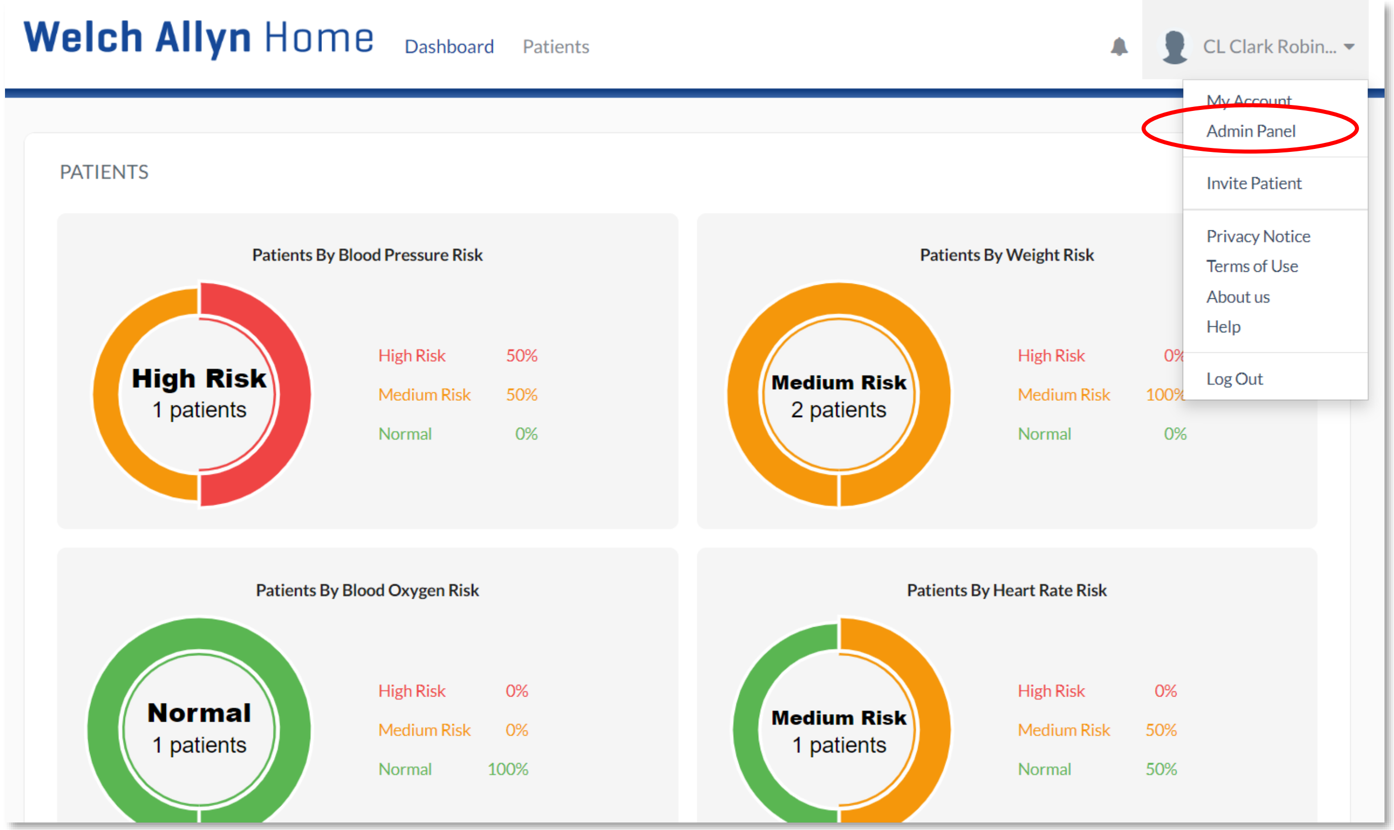
Under Consent to participate in surveys, click on the checkbox to uncheck and revoke your consent to participate in the surveys.

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.***



Click name on the right side of the menu bar.

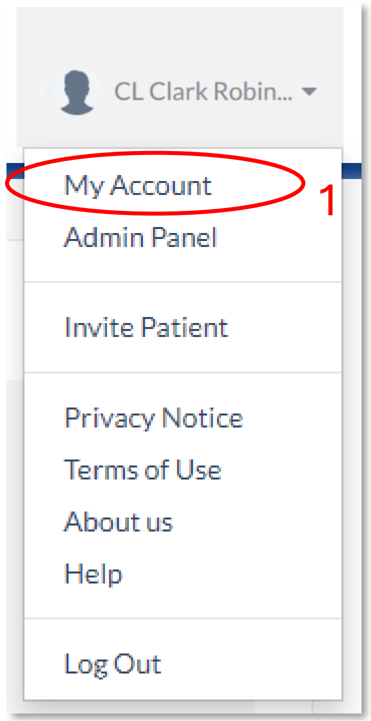
Click **Admin Panel**.

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.

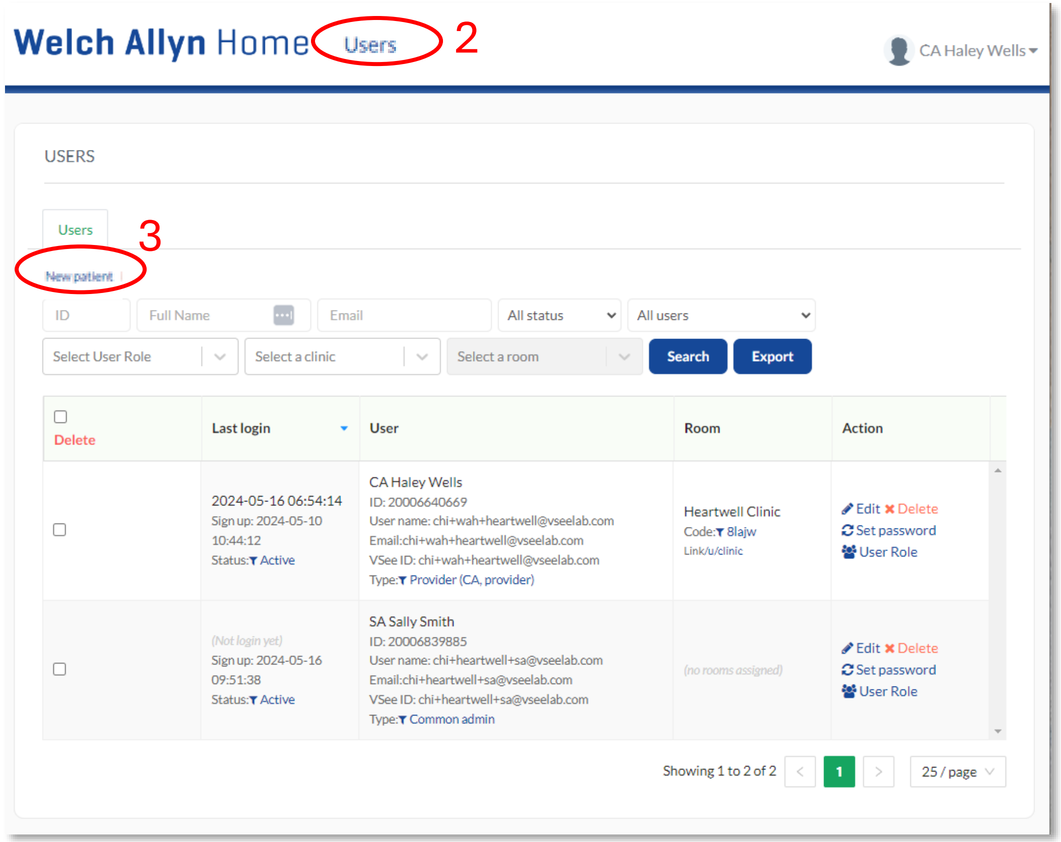
Patients would be able to access their health records through the Welch Allyn Home app and the Patient Portal.

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.

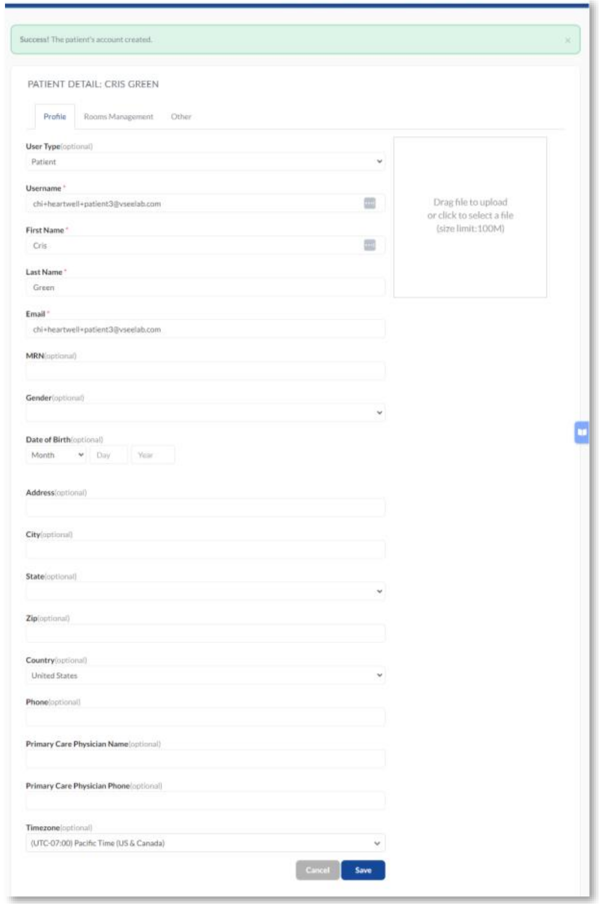
Click **Admin Panel**.



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

Welch Allyn Home

Creating Users – Patients (Cont'd)

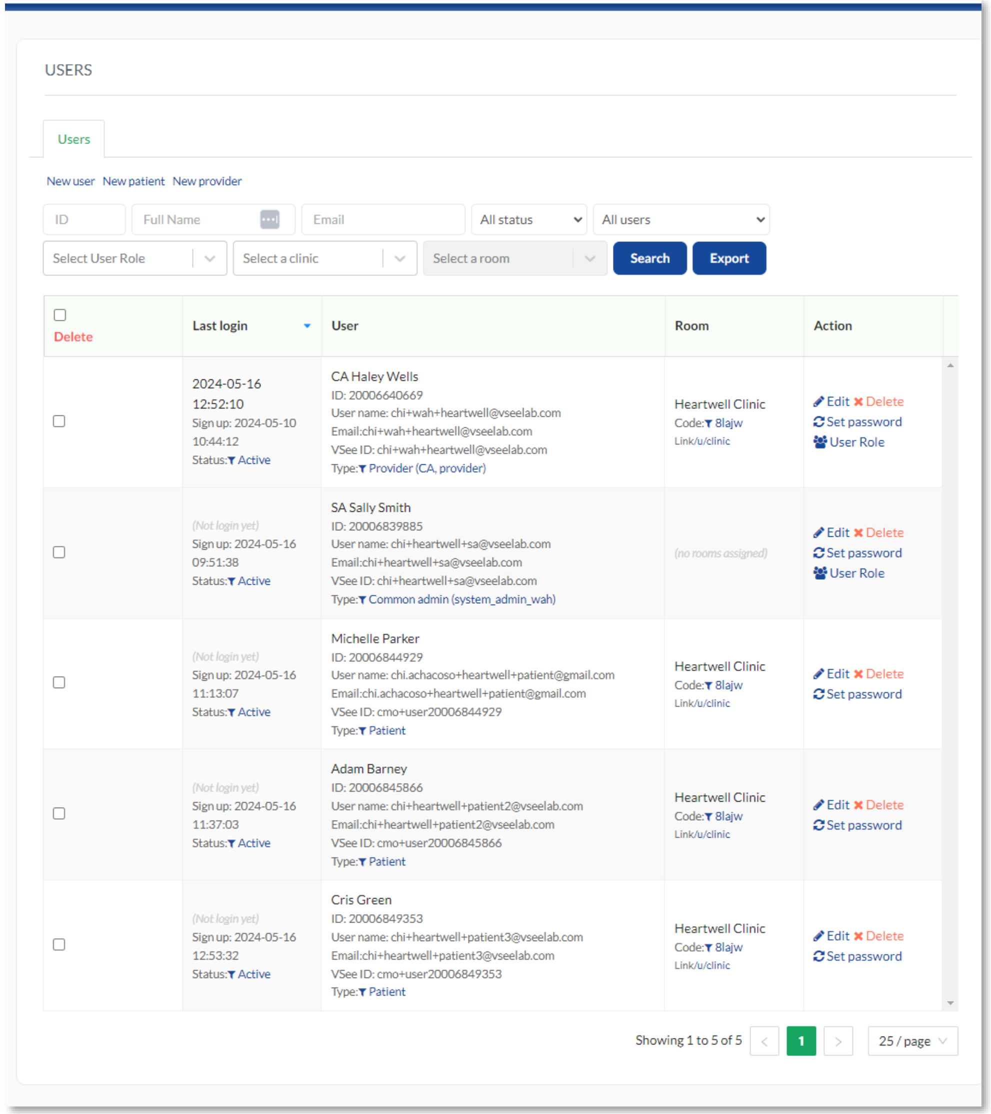


Complete the Clinic, Rooms, Username (use their Email address), First Name, Last Name, Email, and any other optional information.

Then click on **Create**.

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

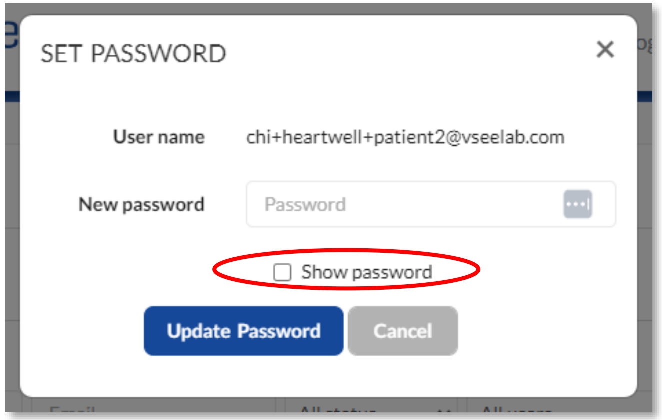
Enter any other optional information and click on **Save**.



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.

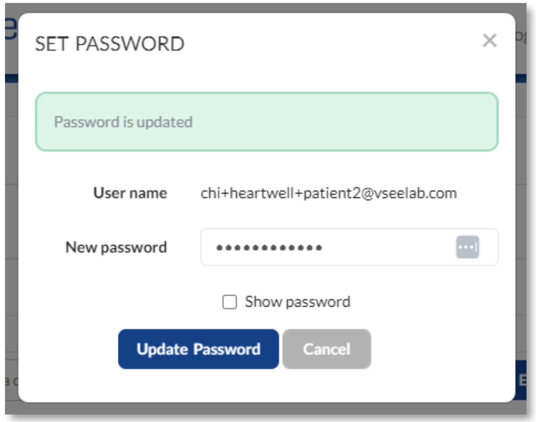
Creating Users – Patients (Cont'd)



Enter a temporary password in the New password field,

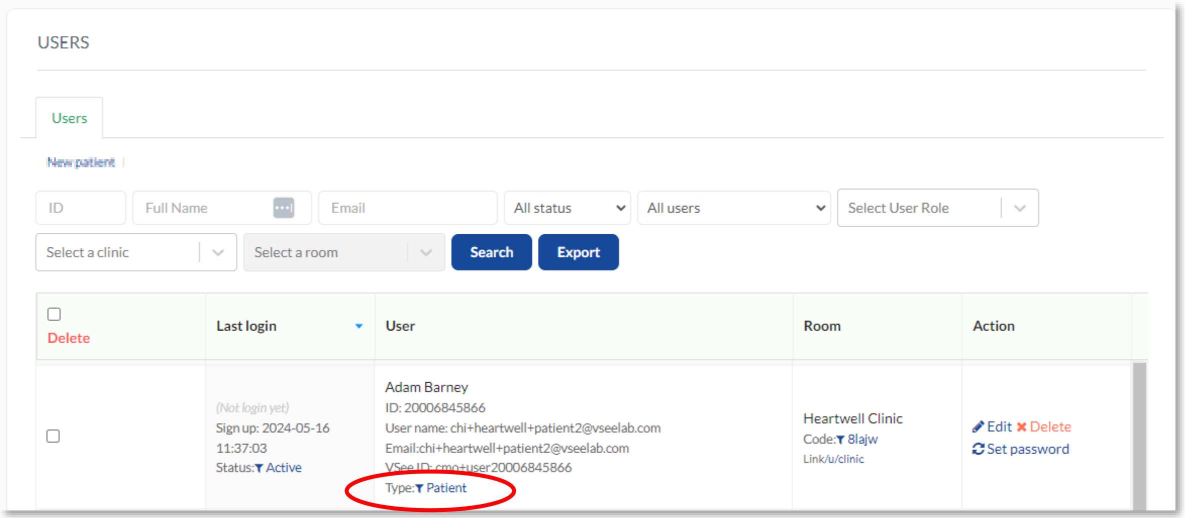
Check the box next to Show password (so you can visually confirm and note what the password is)

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.

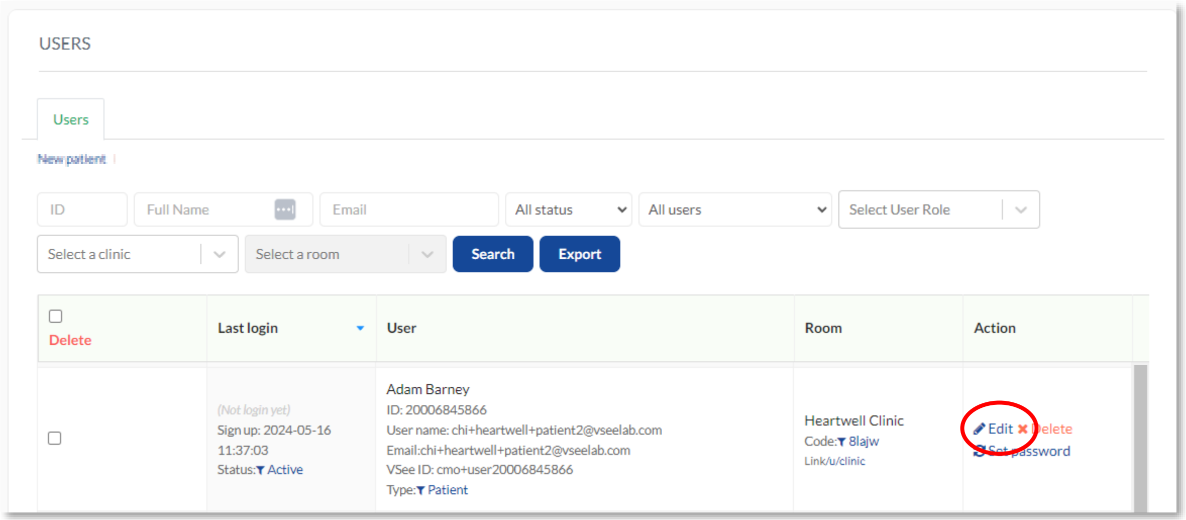


The user type will show as "Patient" in the list of users table

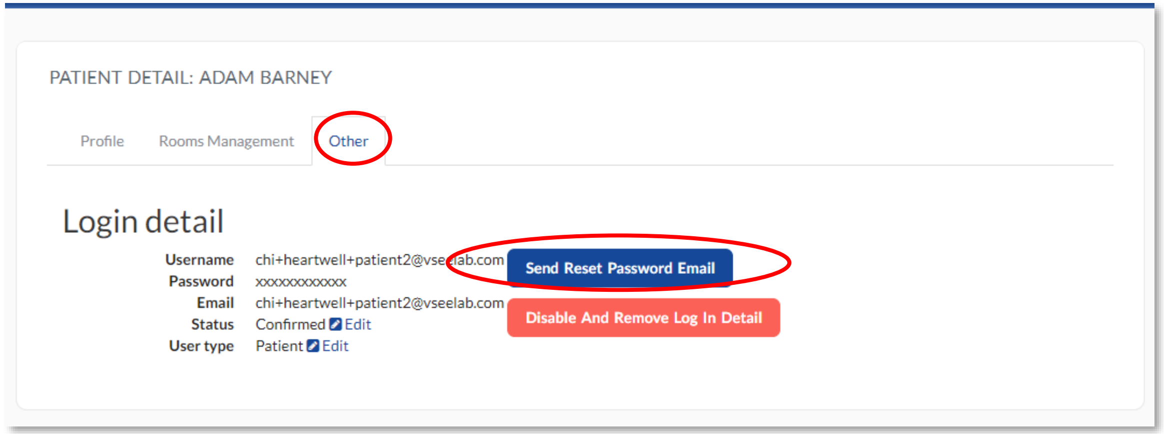
Welch Allyn Home

Creating Users – Patients (Cont'd)

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



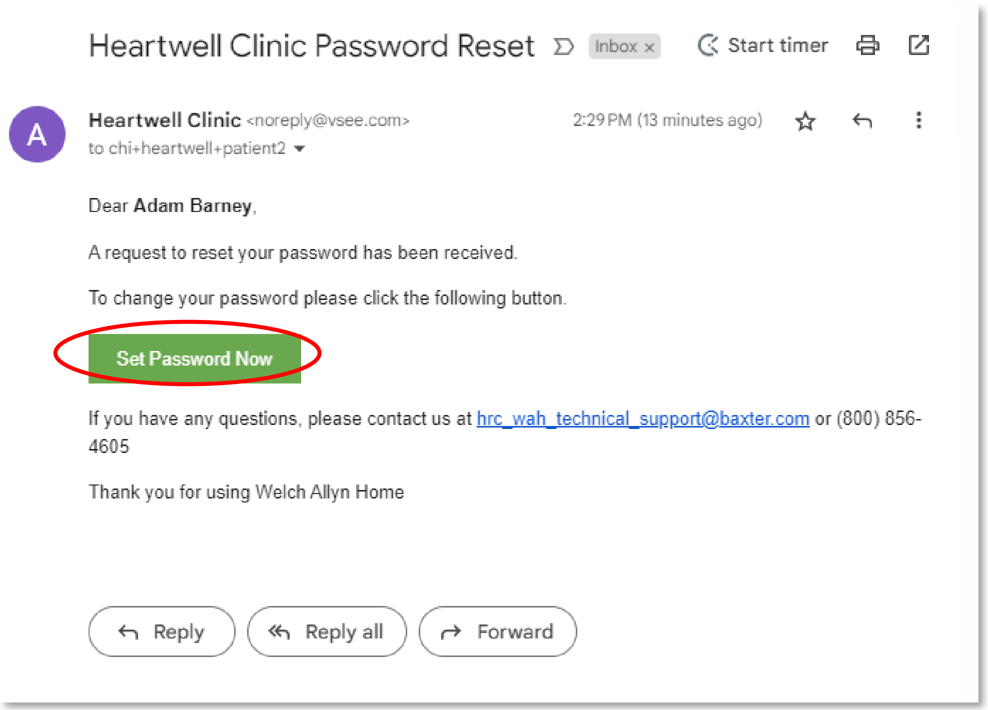
Click **Edit** on the Action column of the Patient to whom the reset password email will be sent



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

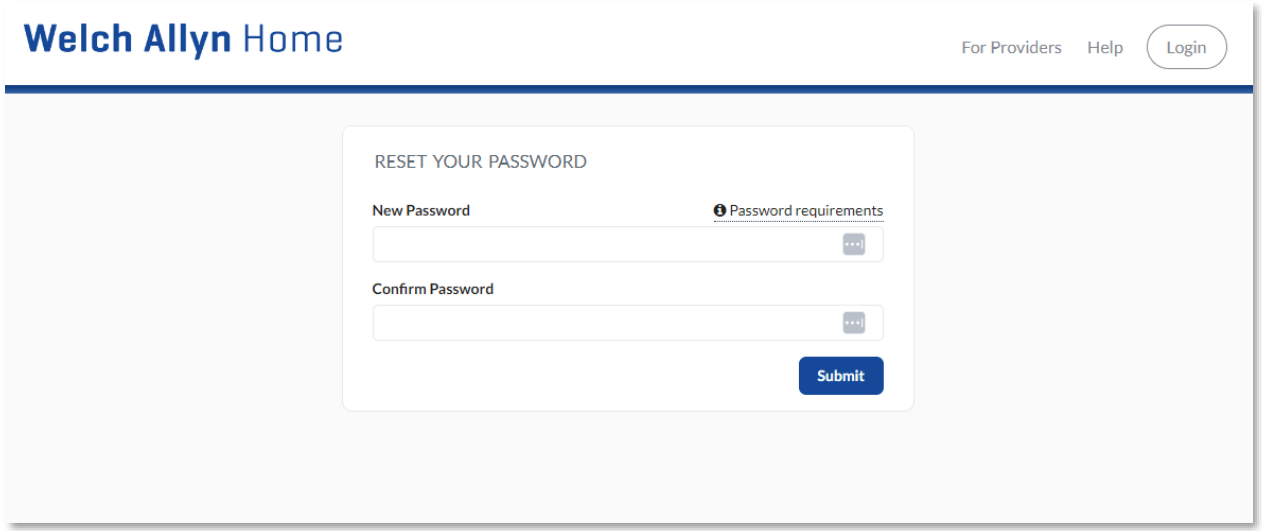
Click **Send Reset Password Email**

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

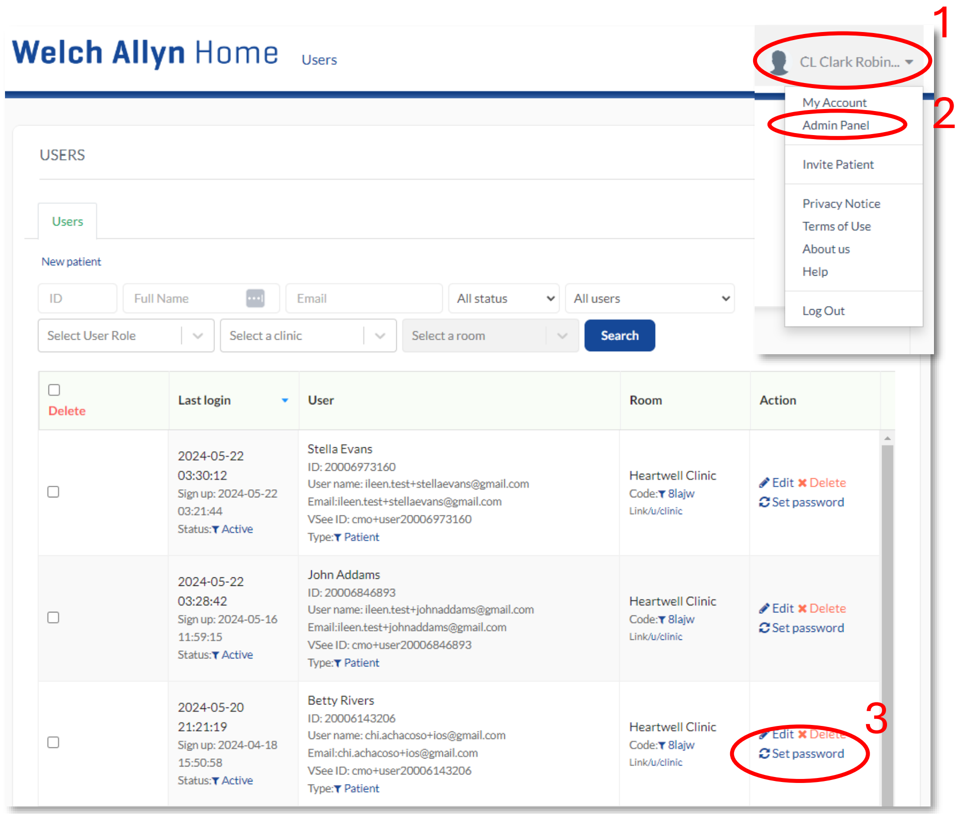
Click **Submit**

Welch Allyn Home

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.

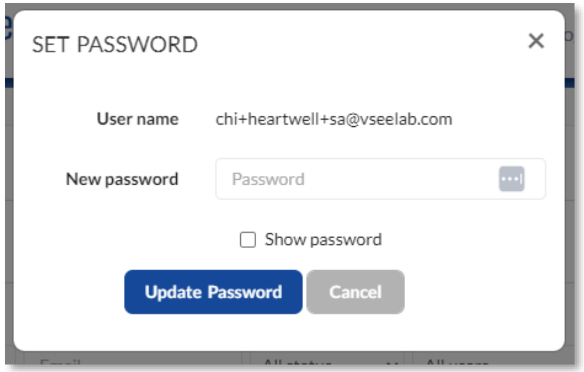
Note: Password on the Portal will be the same on the Welch Allyn Home app (for Patients)



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

2 - Click **Admin Panel**.

3 - Click **Set password**

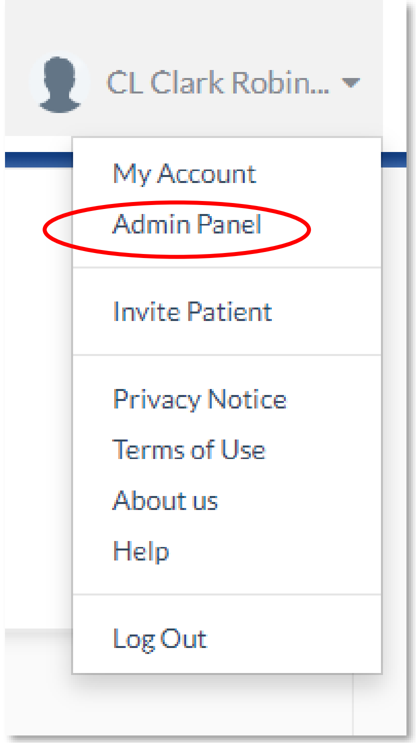


Set a password that meets the requirements

Click **Update Password**

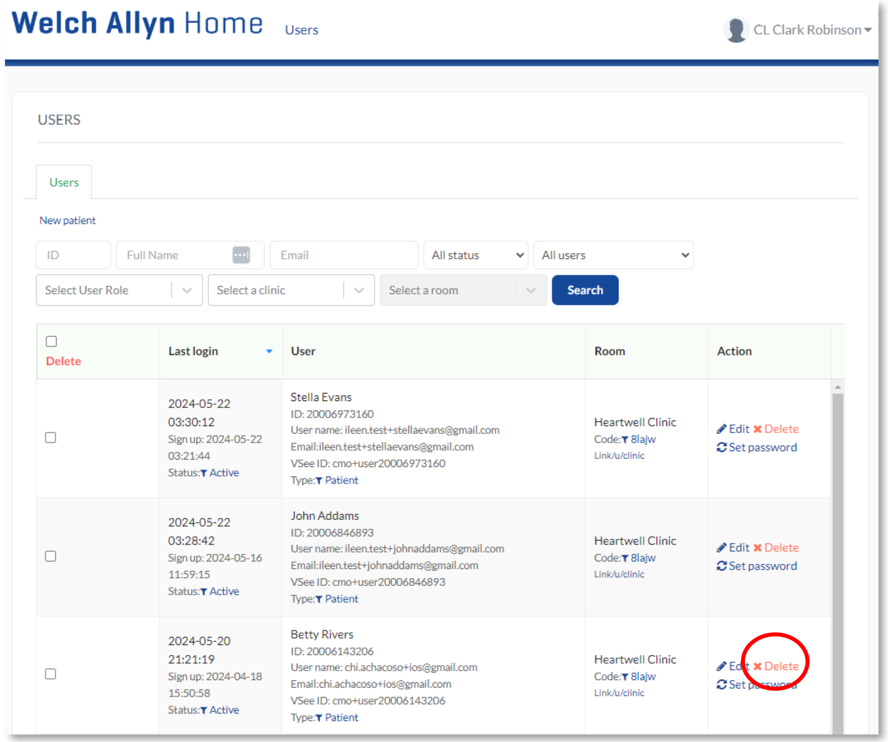
Share the log in information to the user.

Deleting a Patient



Click name on the right side of the menu bar.

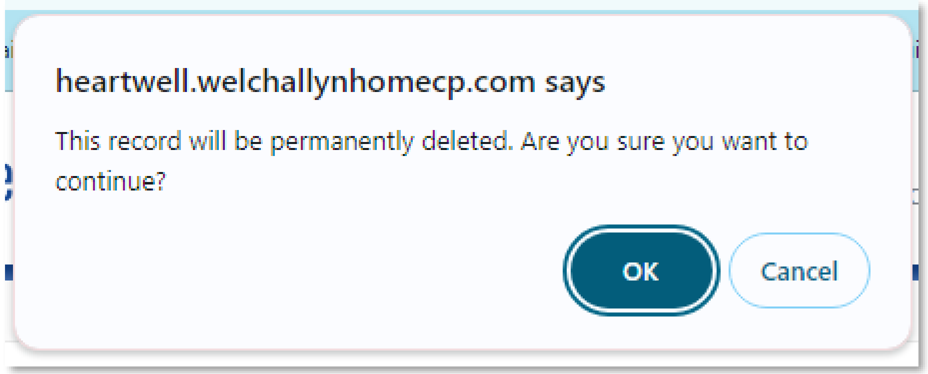
Click **Admin Panel**.



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

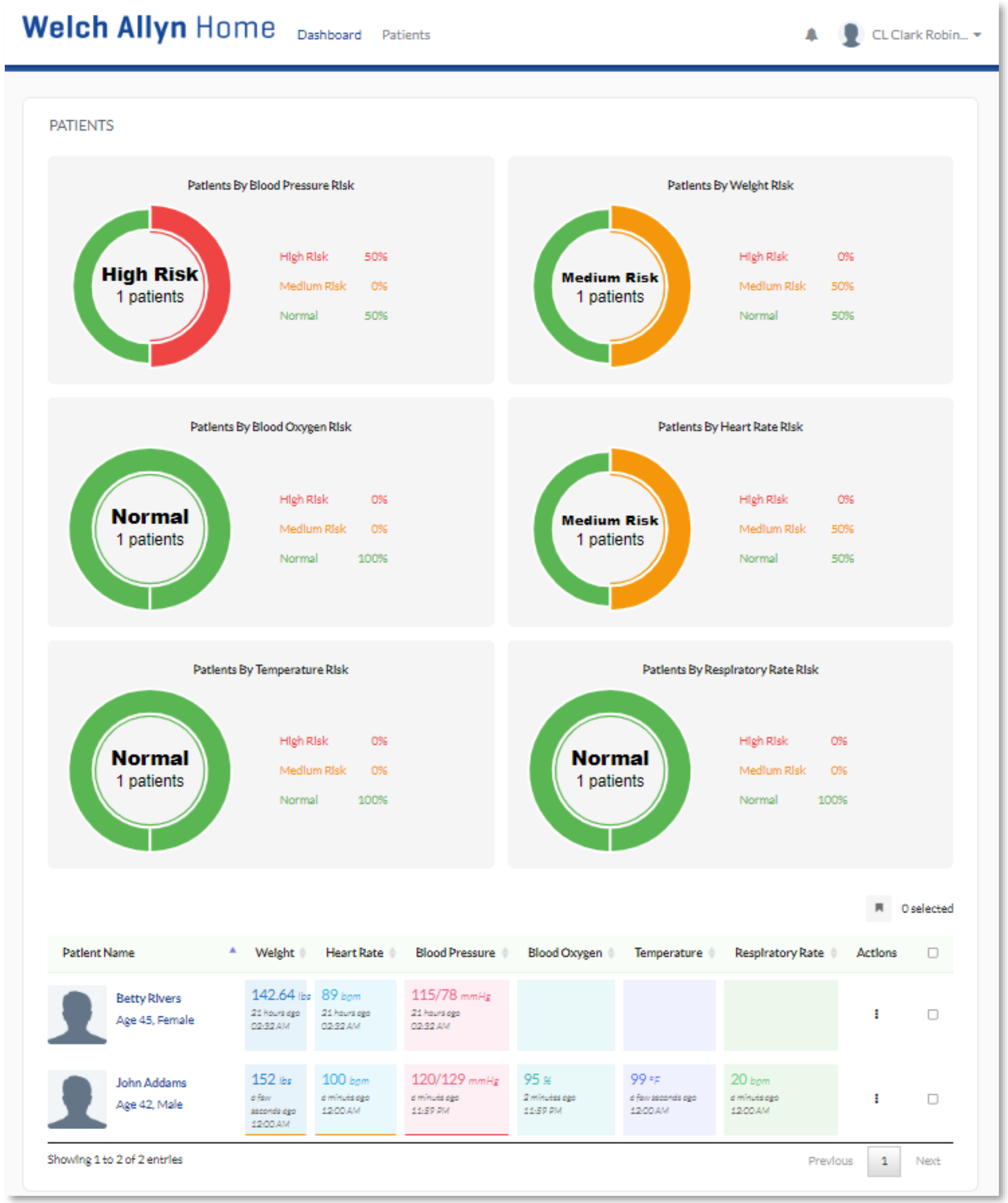


Click on **OK** to confirm deletion of the account..

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.



Welch Allyn Home

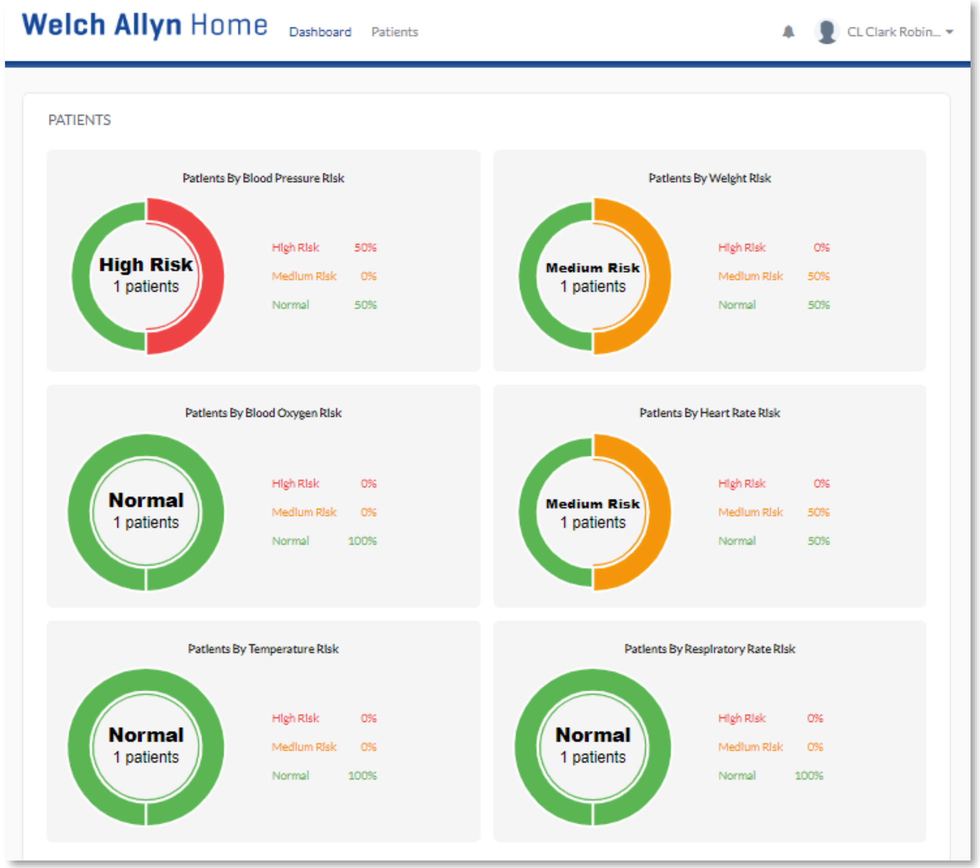
Risk Level Charts

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.

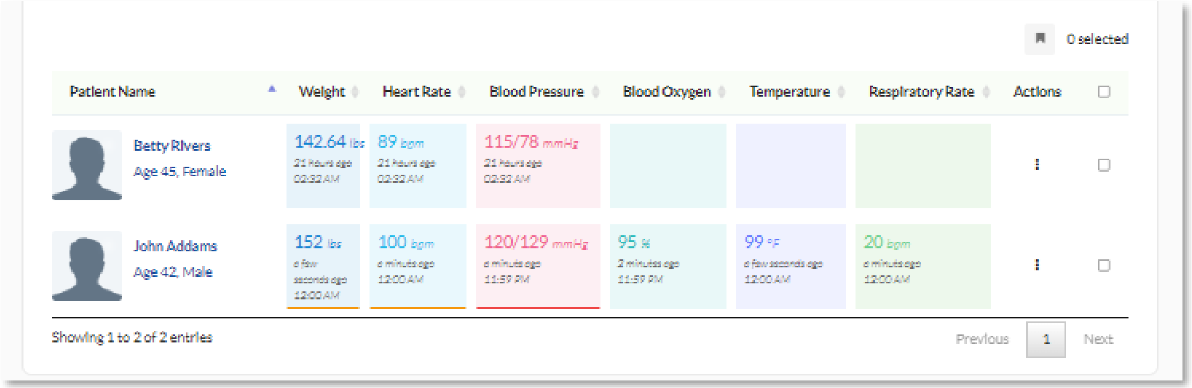
Click on a risk level color in a particular vitals chart to filter the table of patients on the Readings table for only those classified on that risk level for that vital sign.

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



Welch Allyn Home

Readings Table



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.

[Table of Contents](#) [Clinician/Provider TOC](#)

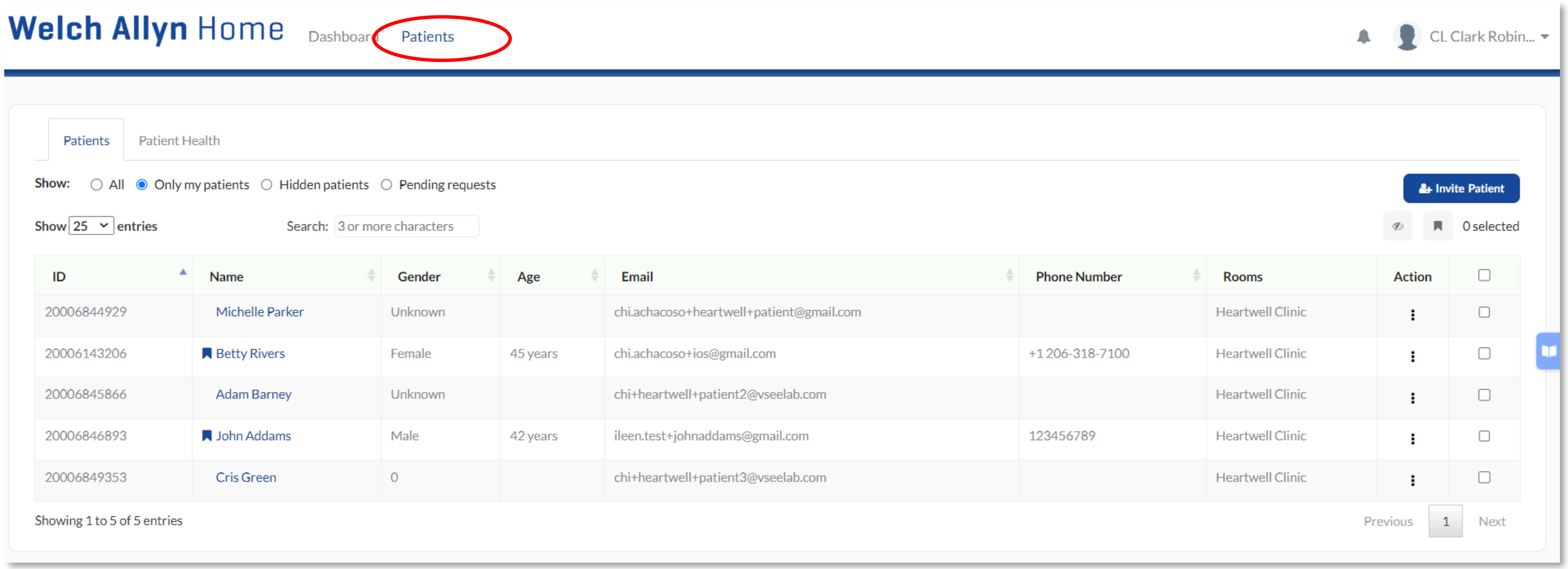
Patients

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



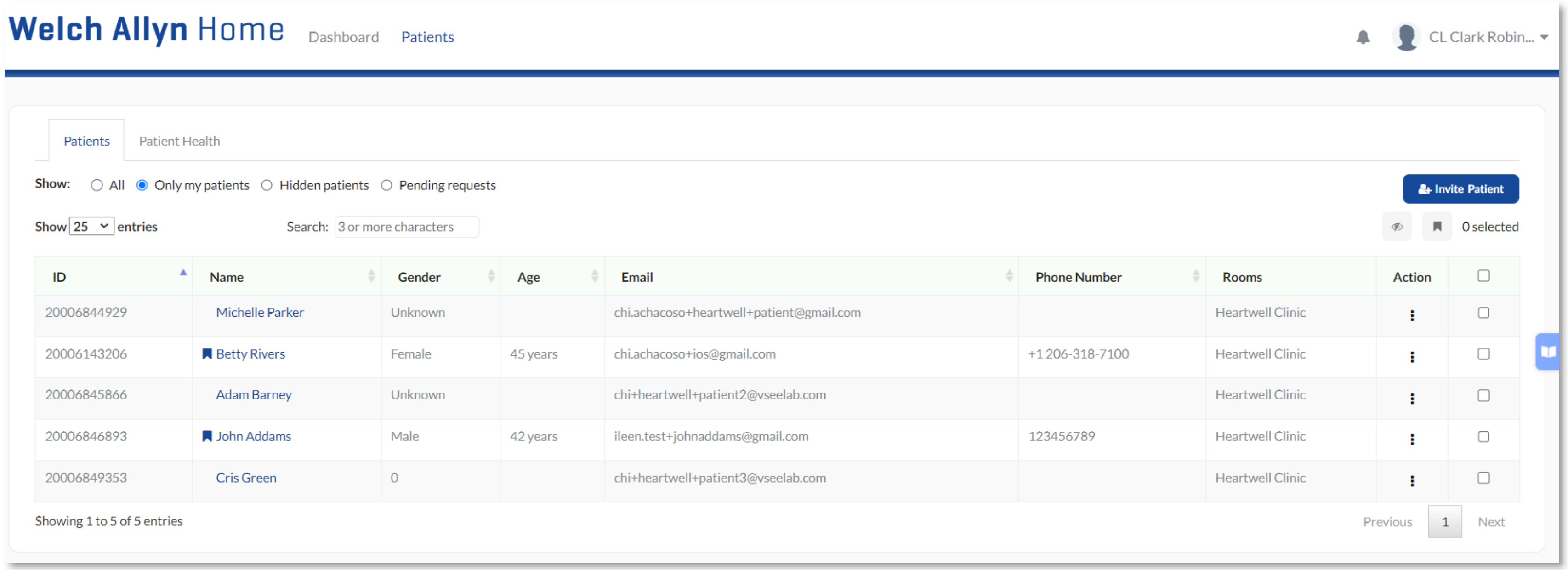
Click on the **Patients** link at the top of the page to view patient information.

Welch Allyn Home

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.



Patient Health Tab

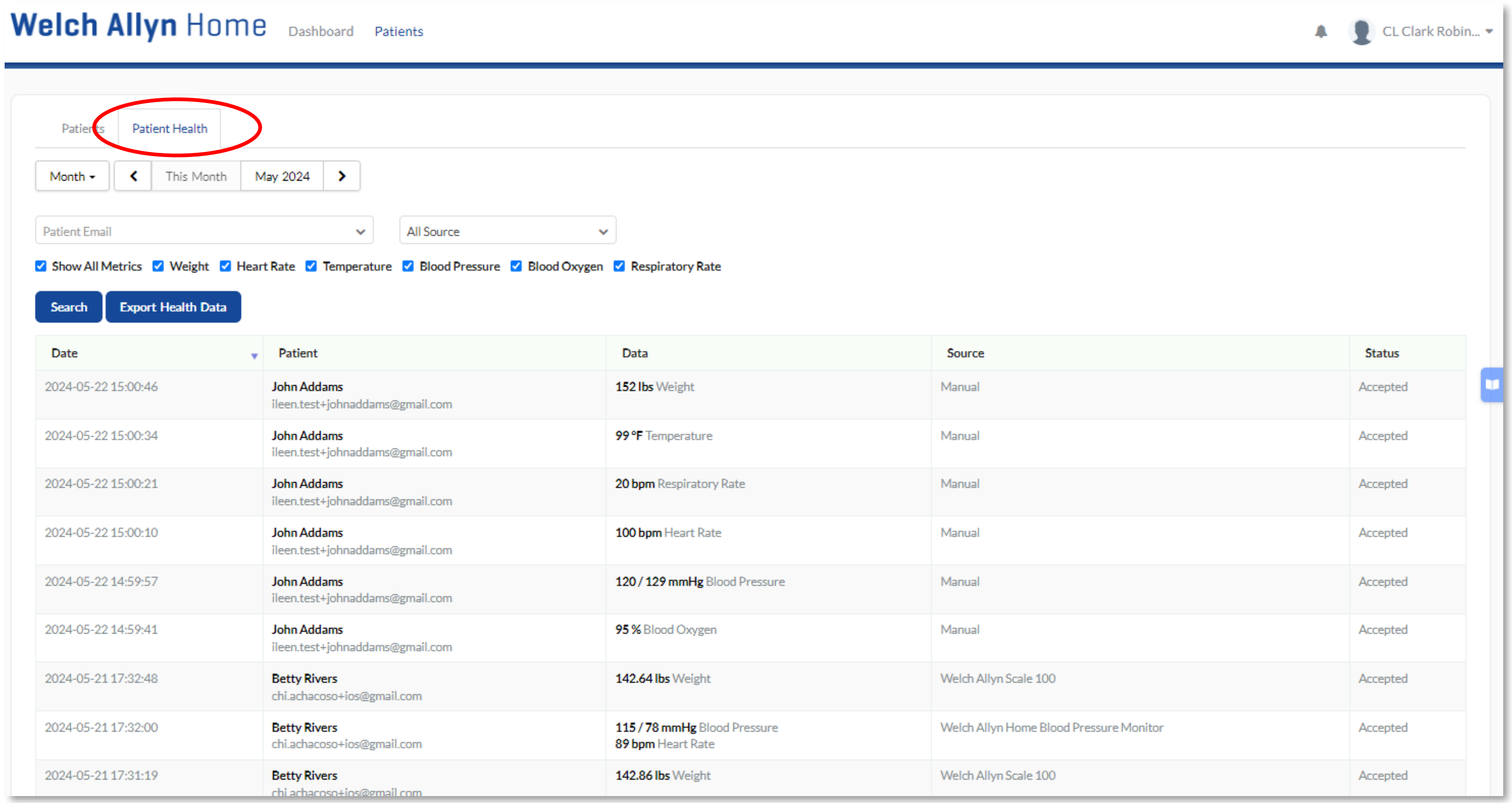
This screen displays patients' individual vitals readings.
To filter the data that you want to view, select the following from the dropdown menus:

- 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



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

>

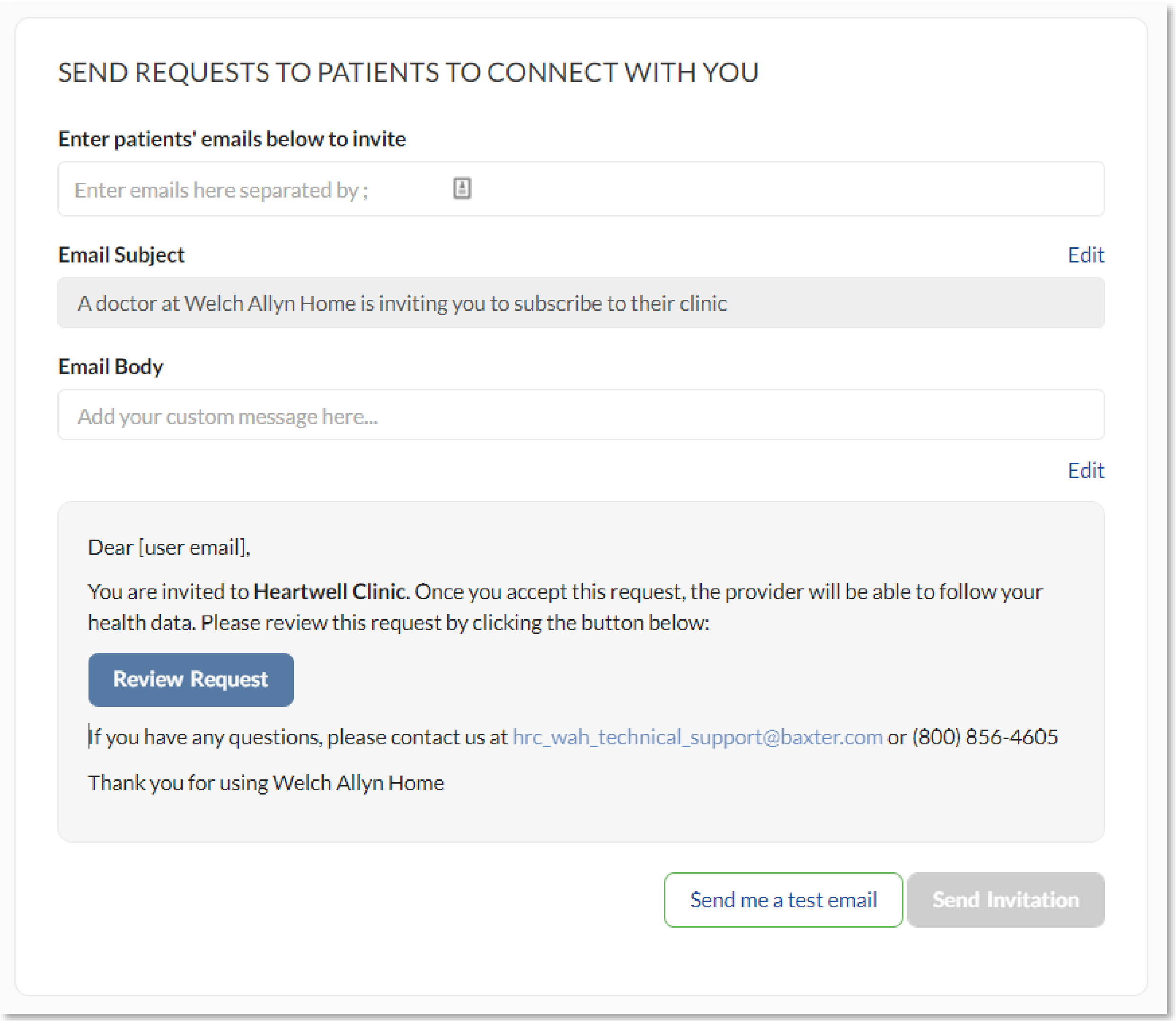
Invite Patient

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.

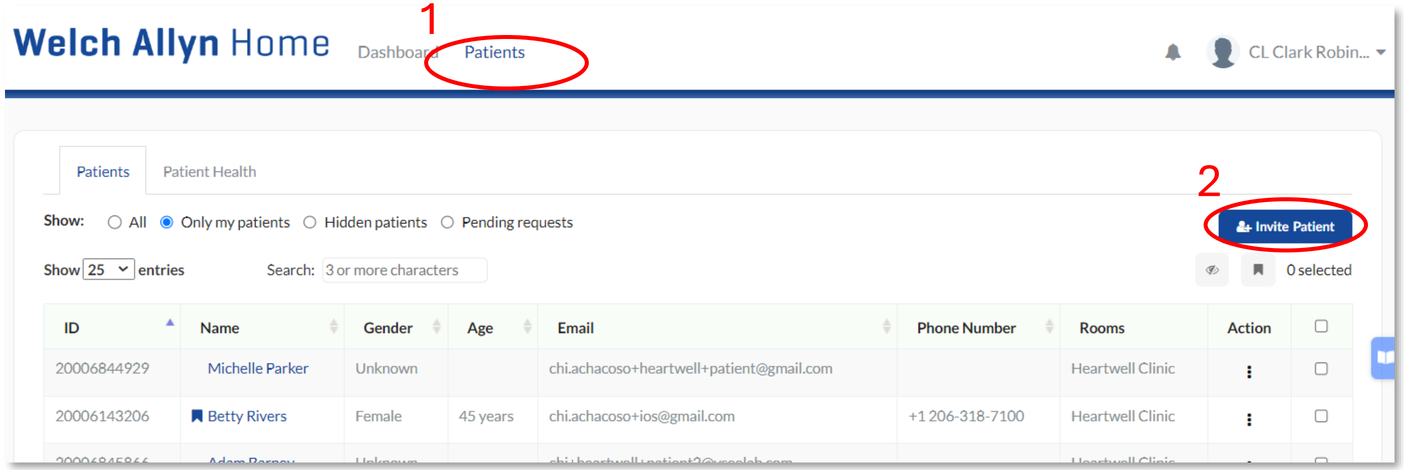
For patient accounts created by an admin user, obtain the temporary password from the admin user and provide it to the patient.

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

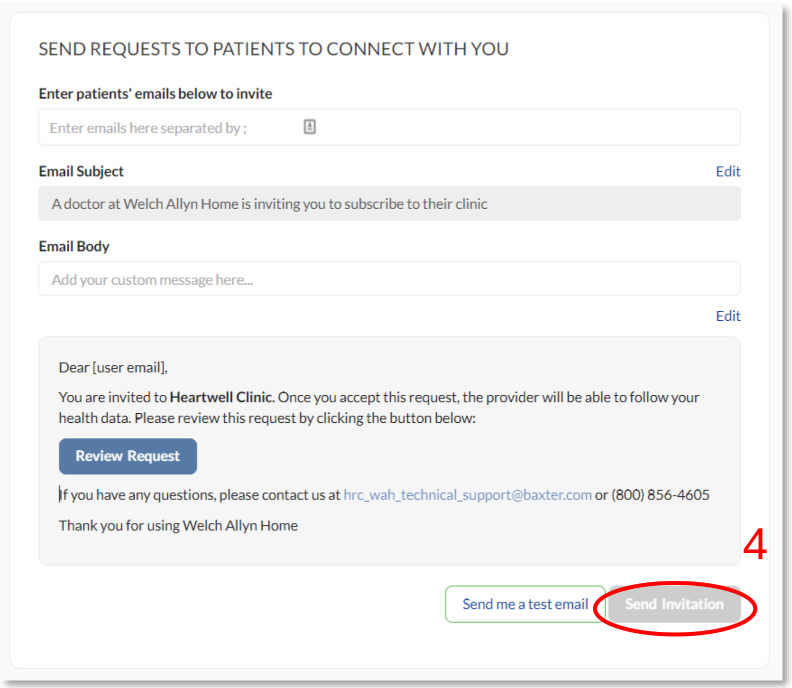


Welch Allyn Home

Invite Patient – Cont'd



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.

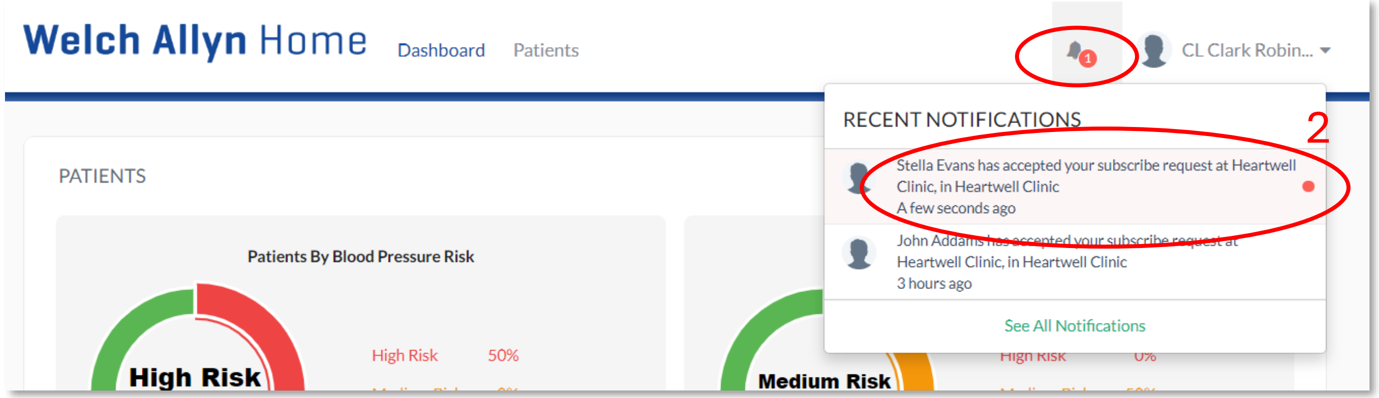
Click **Send Invitation**.
A message displays indicating whether the email was sent or not.
Note: The following will prevent the email from being sent:
- The patient has not created an account yet.
- The patient has already subscribed to the clinic.
- The patient has not accepted a pending invite.

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

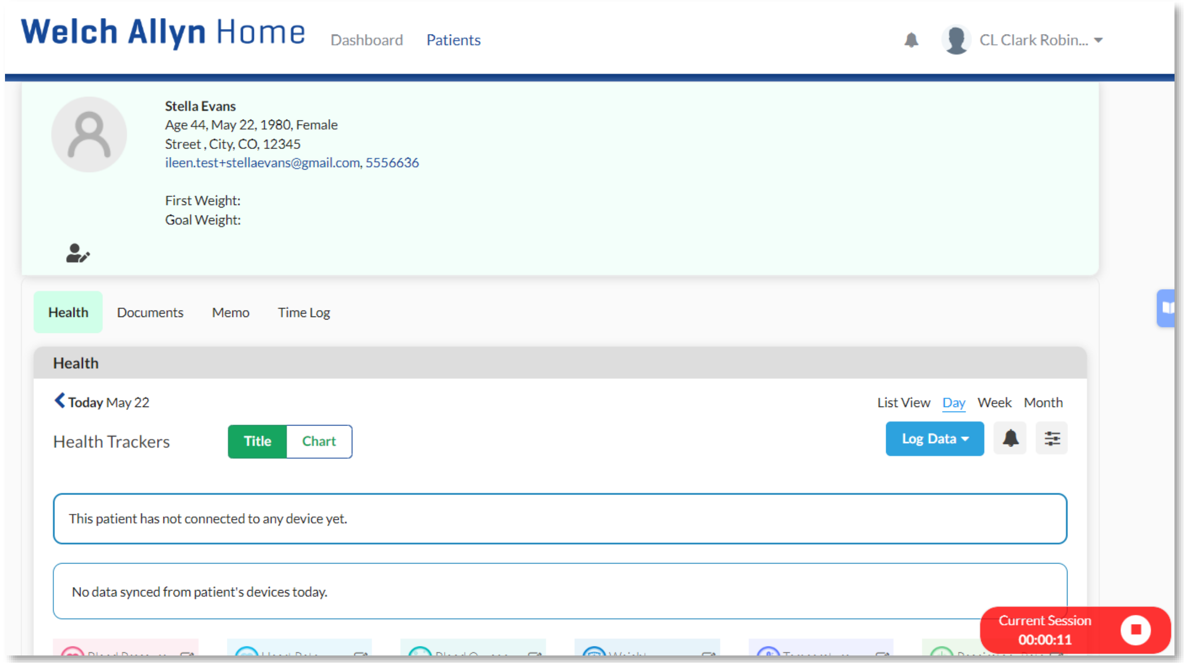
Welch Allyn Home

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.

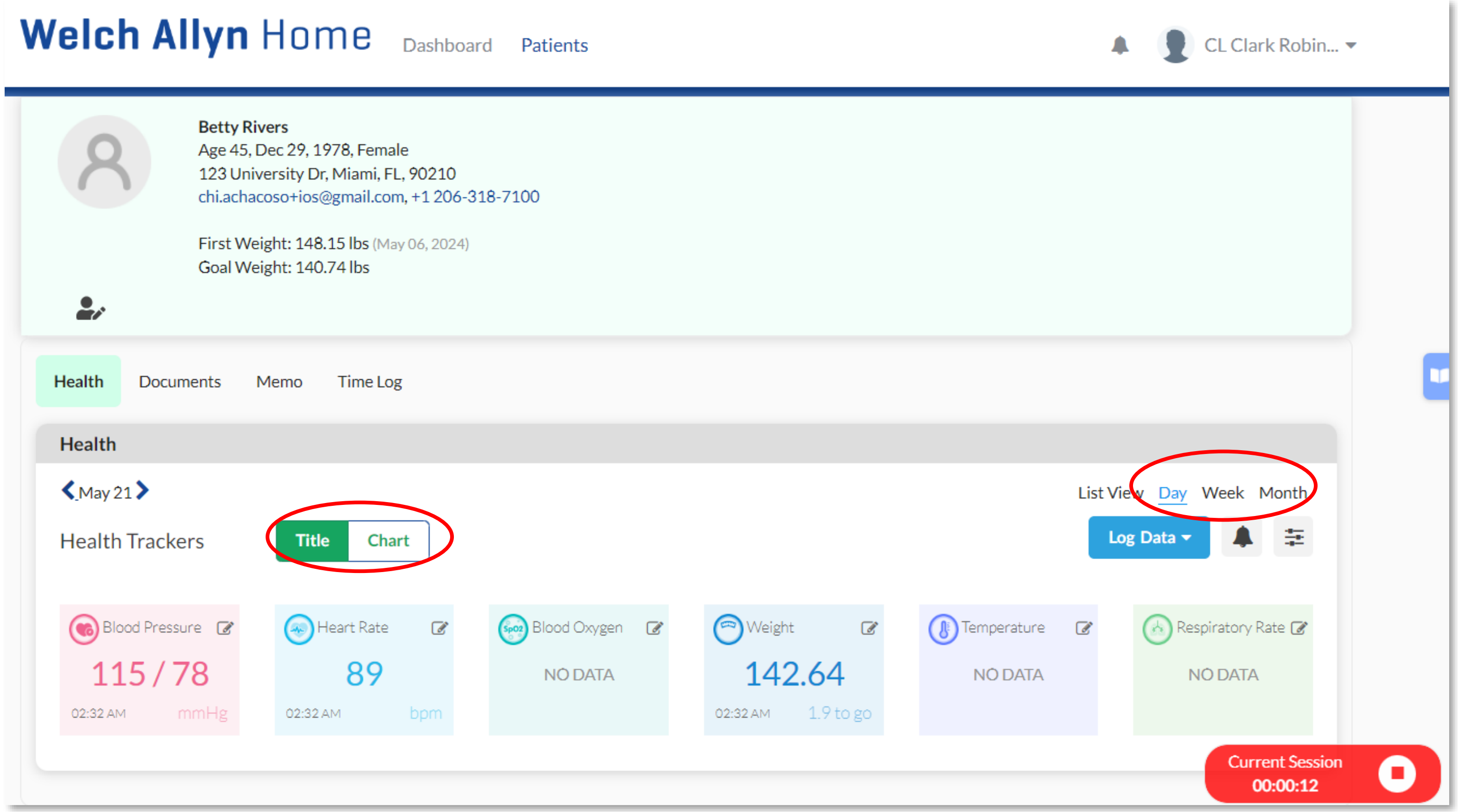


Welch Allyn Home

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.



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**

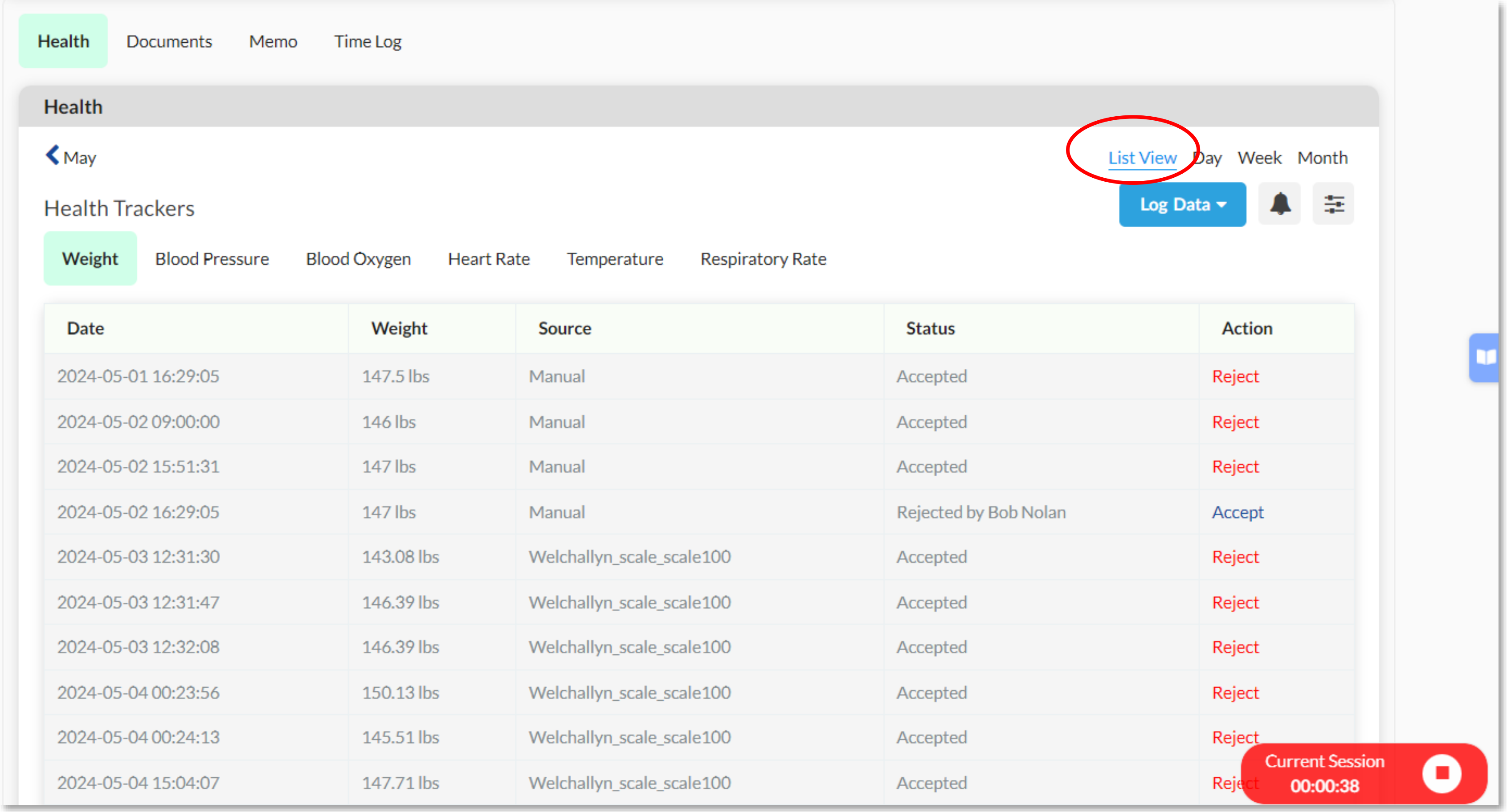
Readings for the selected time period are displayed in chart layout.
Note: Refresh the page to return to the initial default Title view.

Health/vitals Readings – cont'd

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

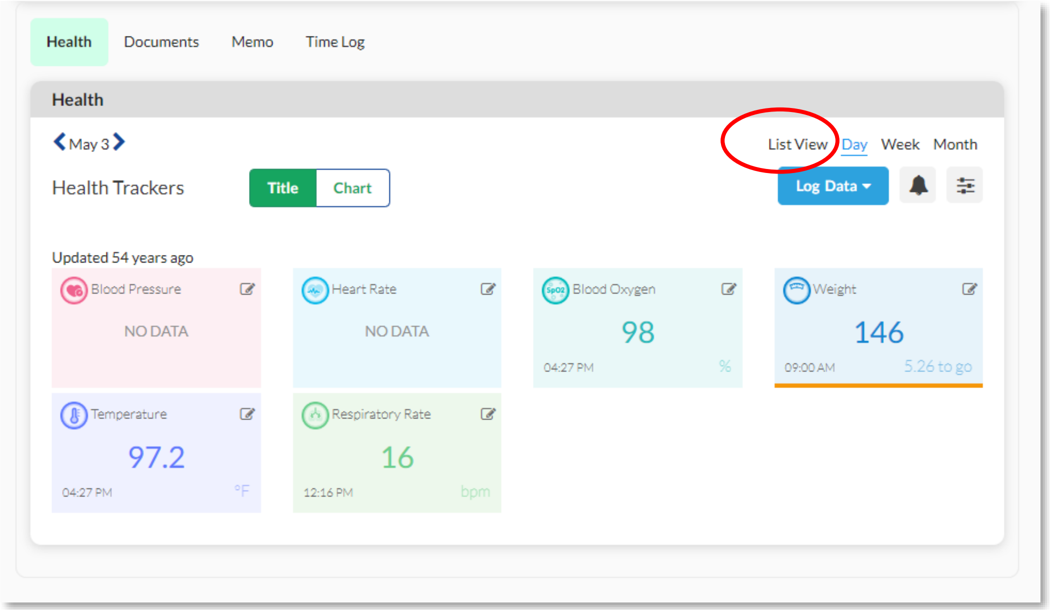
- Weight (default)
- Blood pressure
- Blood oxygen
- Pulse
- Temperature

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



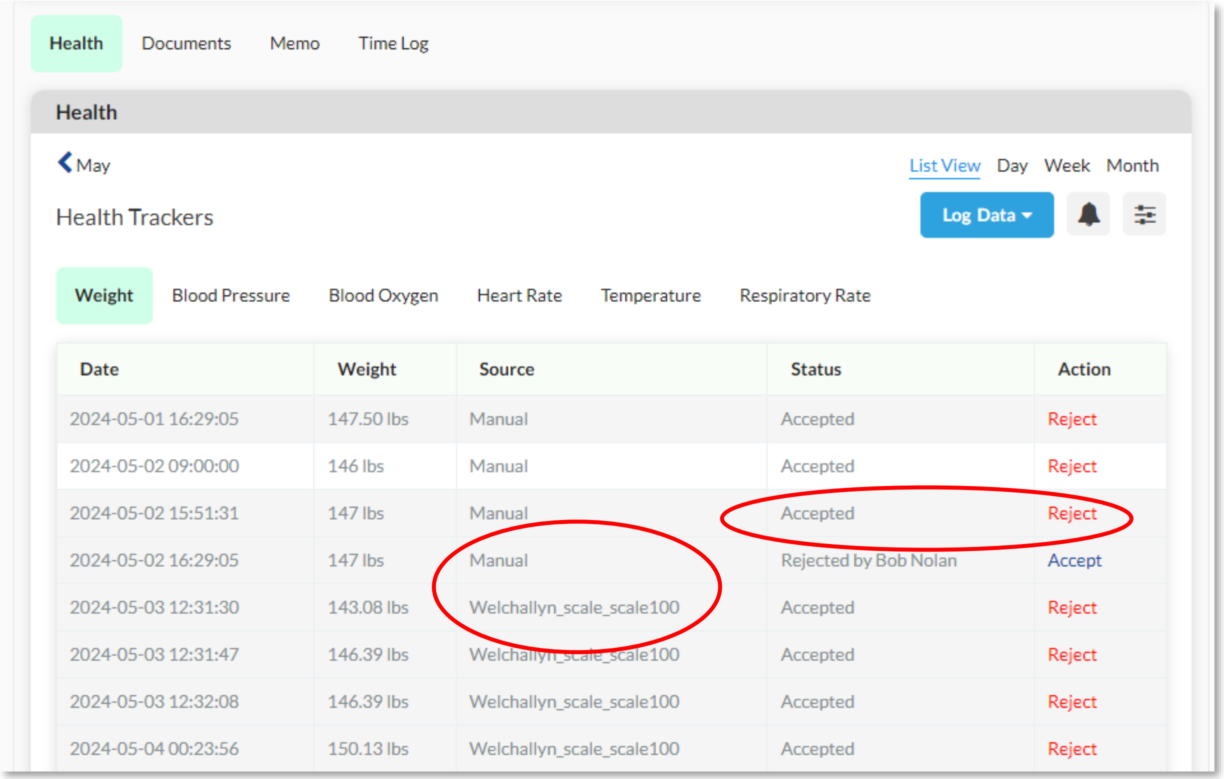
Accepting or Rejecting a Reading

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



Select the Patient to view the health readings

Click **List View**

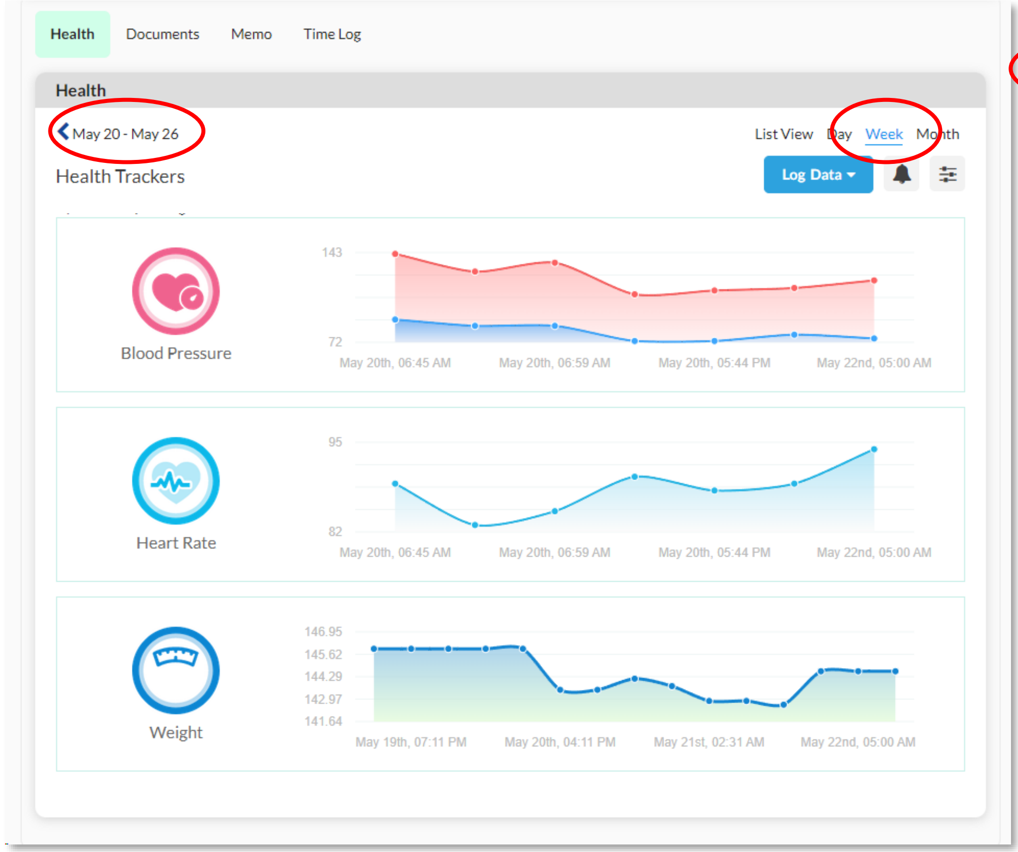


- A reading's source would display whether it was synced or manually logged.
- Click **Accept/Reject**
- A rejected reading cannot be edited, unless accepted

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.

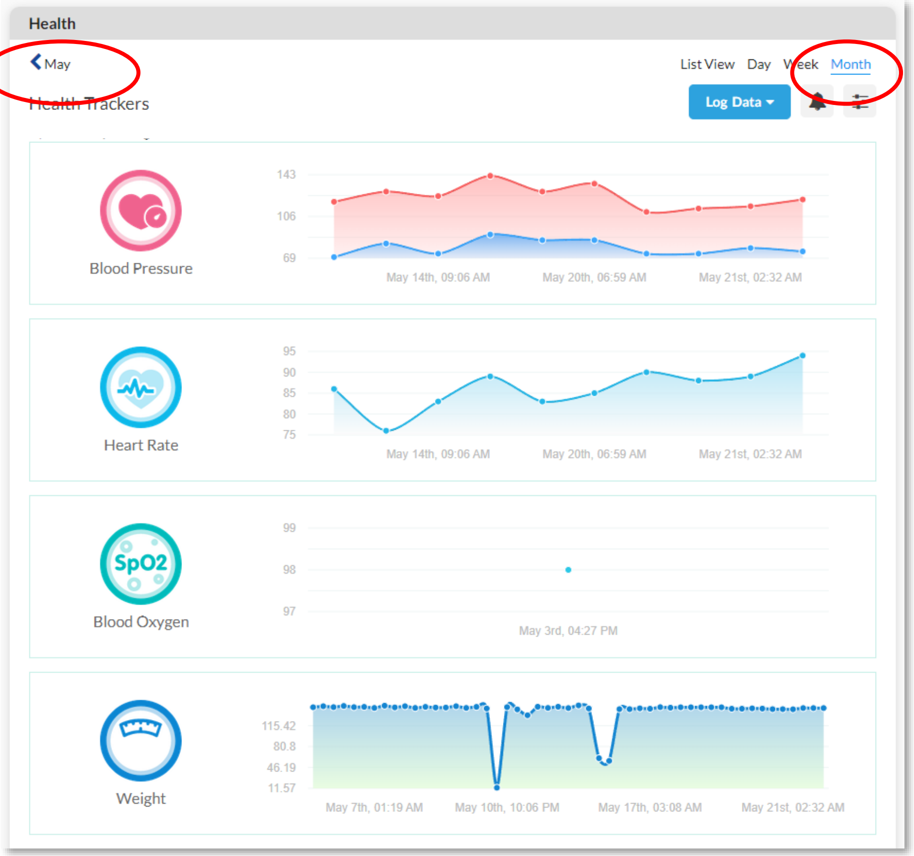
Week View



Tap **Week**

Scroll through the weeks by clicking the arrows

Month View



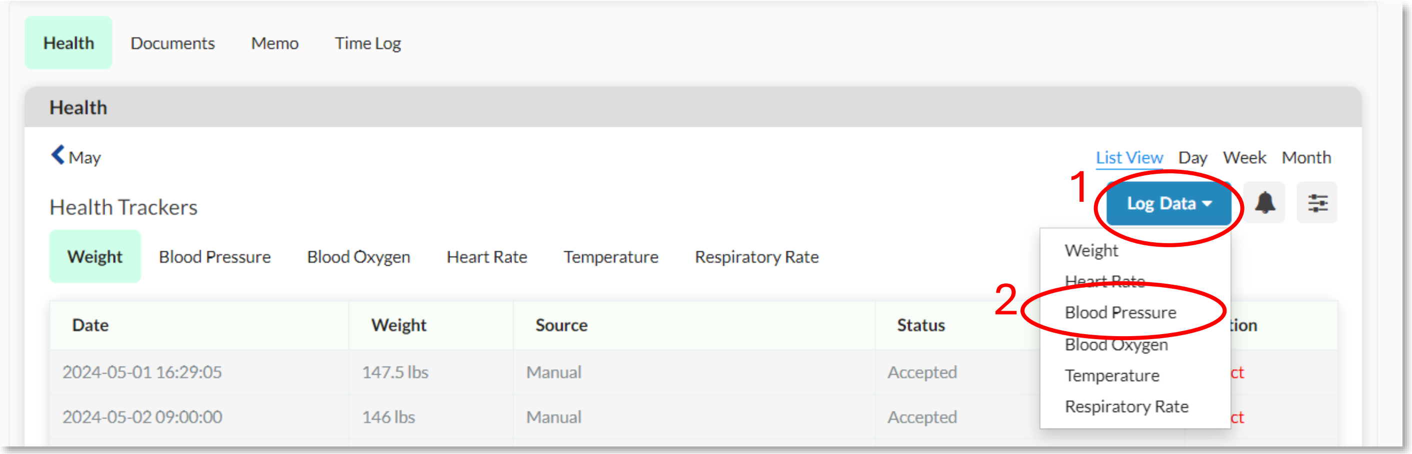
Tap **Month**

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.

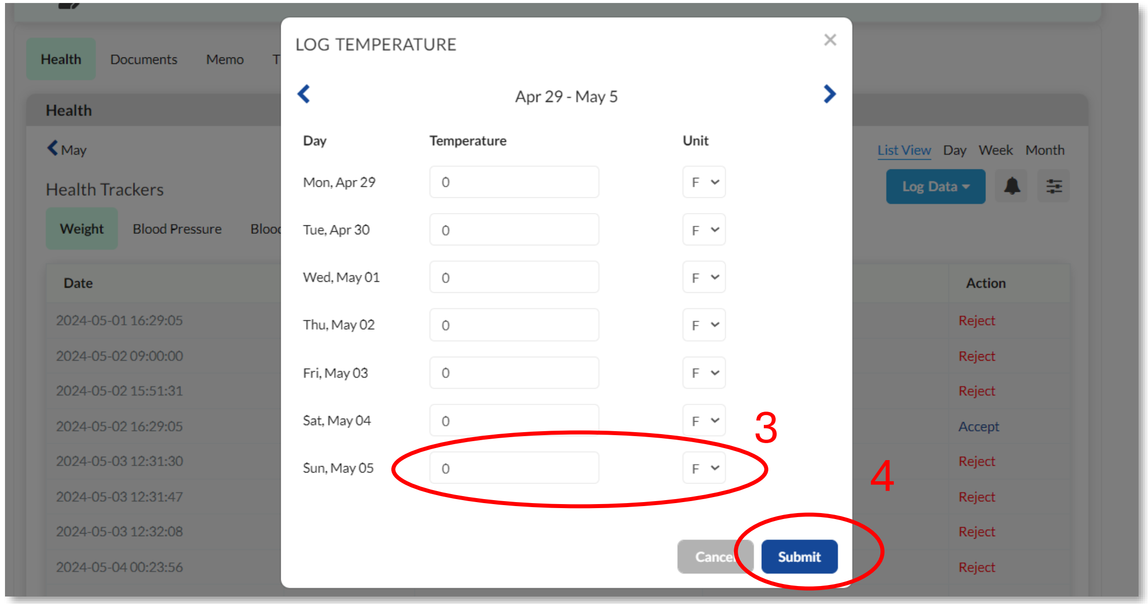
2 - Select between Weight, Heart Rate, Blood Pressure, Blood Oxygen, Temperature, and Respiratory Rate.
A weekly log appears.



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.



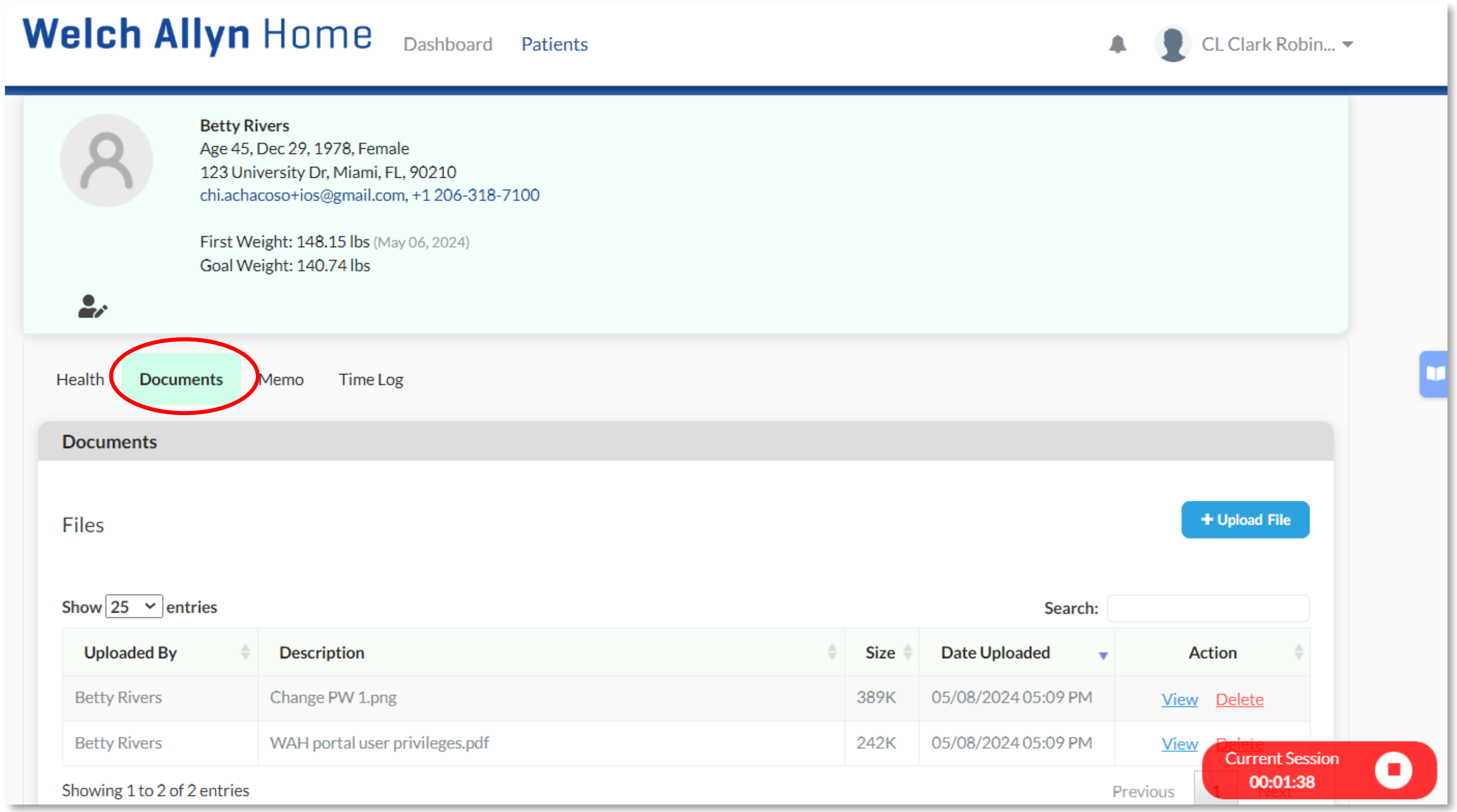
Welch Allyn Home

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



Review and Upload Documents - Upload Files

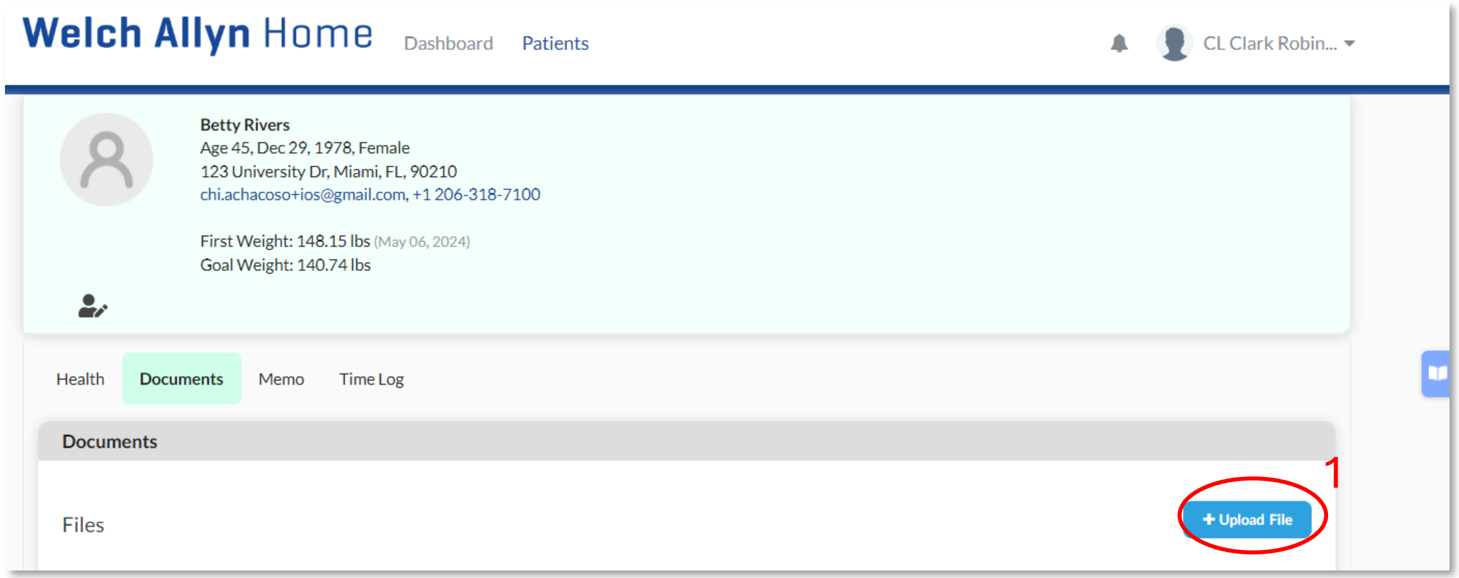
Give a meaningful name to the file to upload as that is what will display in the portal in the Description column.

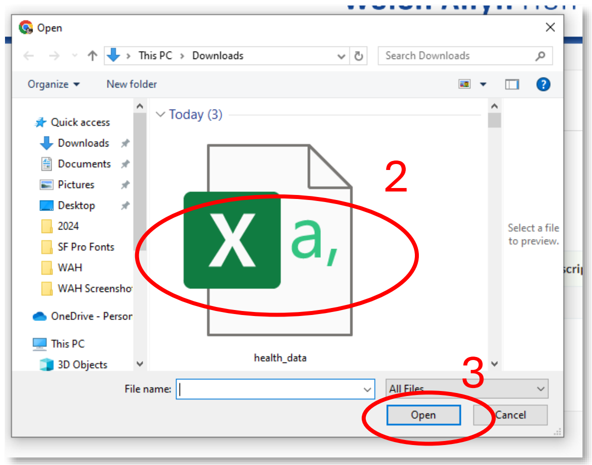
1 - Click on **+Upload File**.

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.

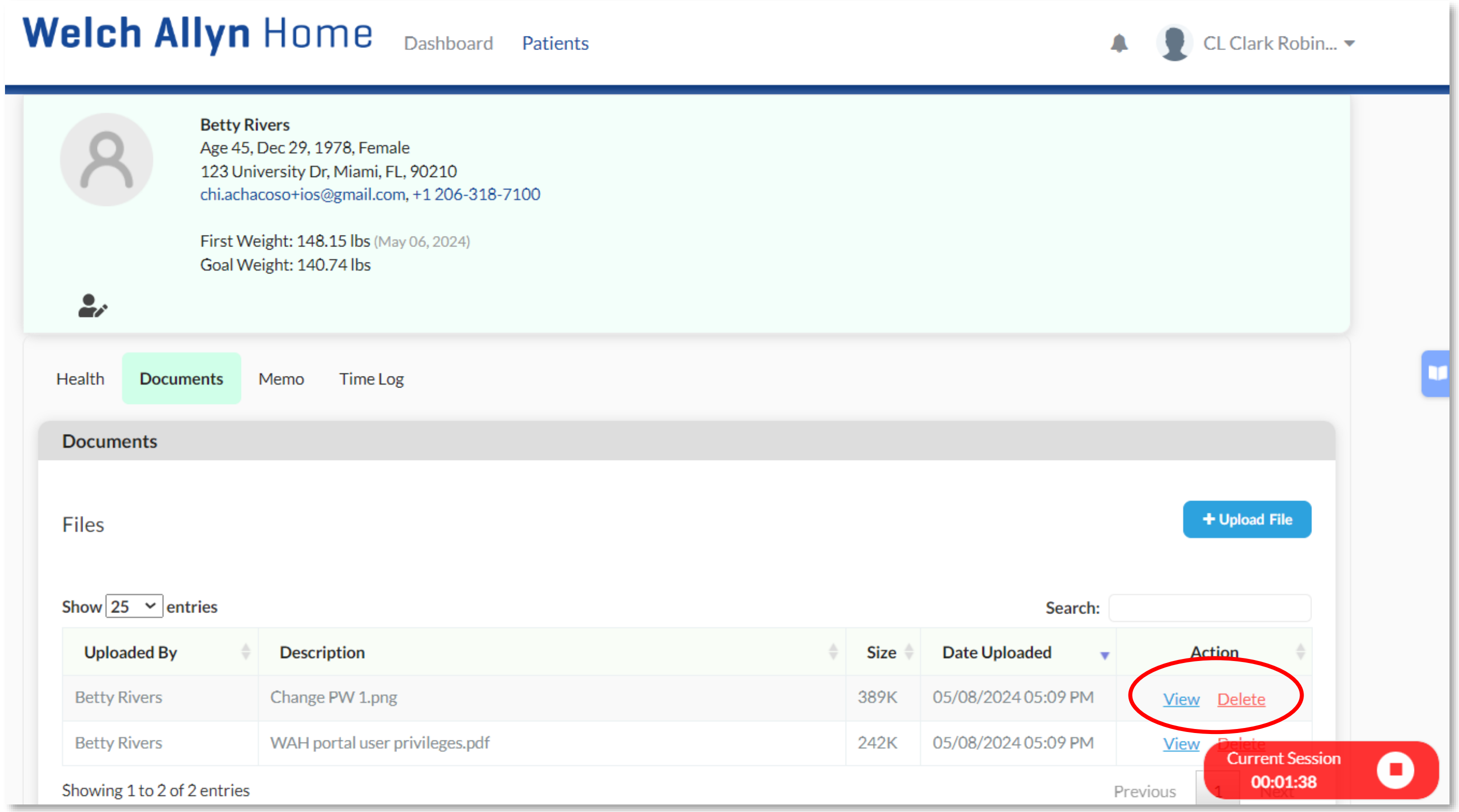
The file opens in a new browser tab.

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.



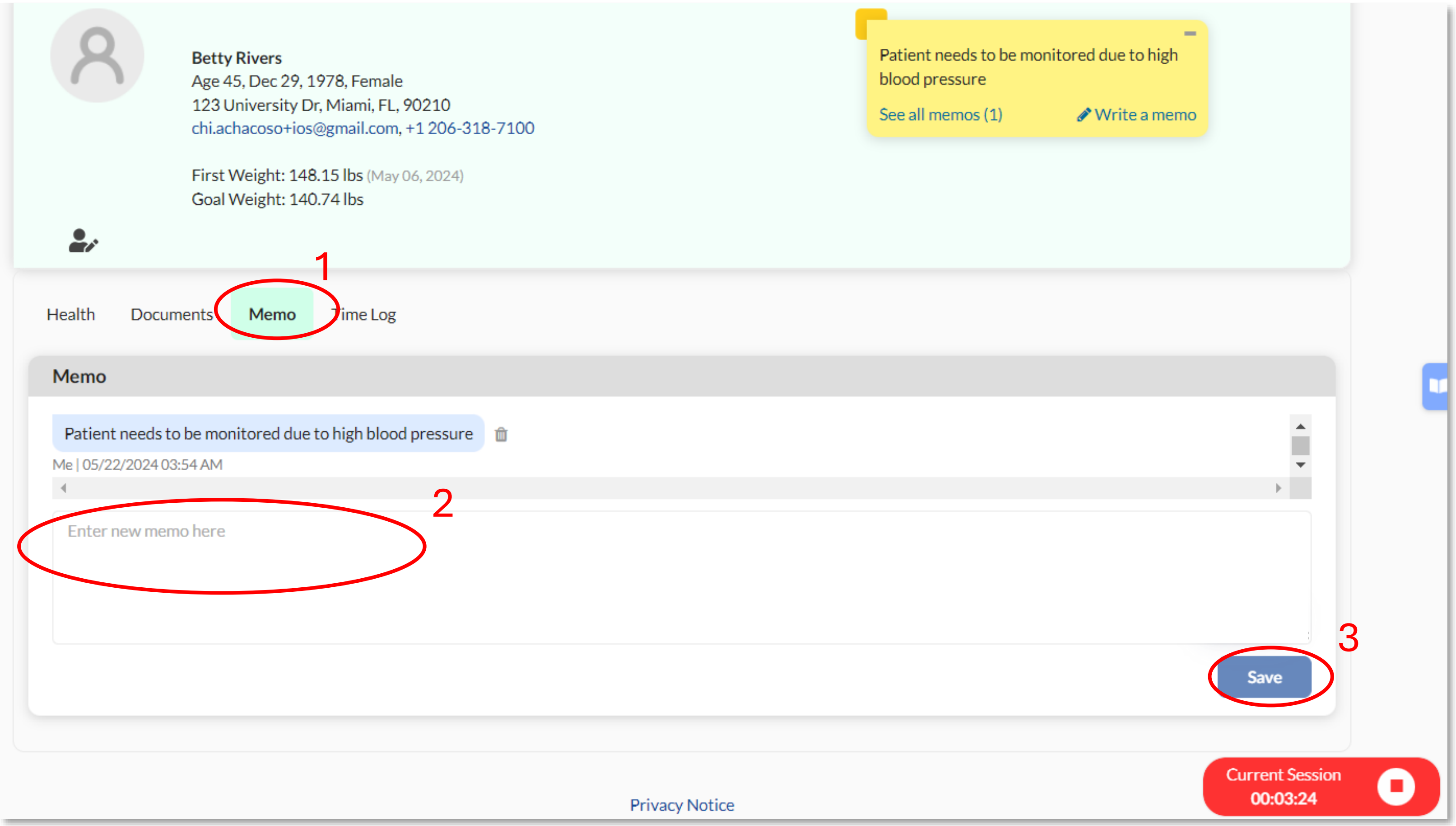
Memo

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.



Welch Allyn Home

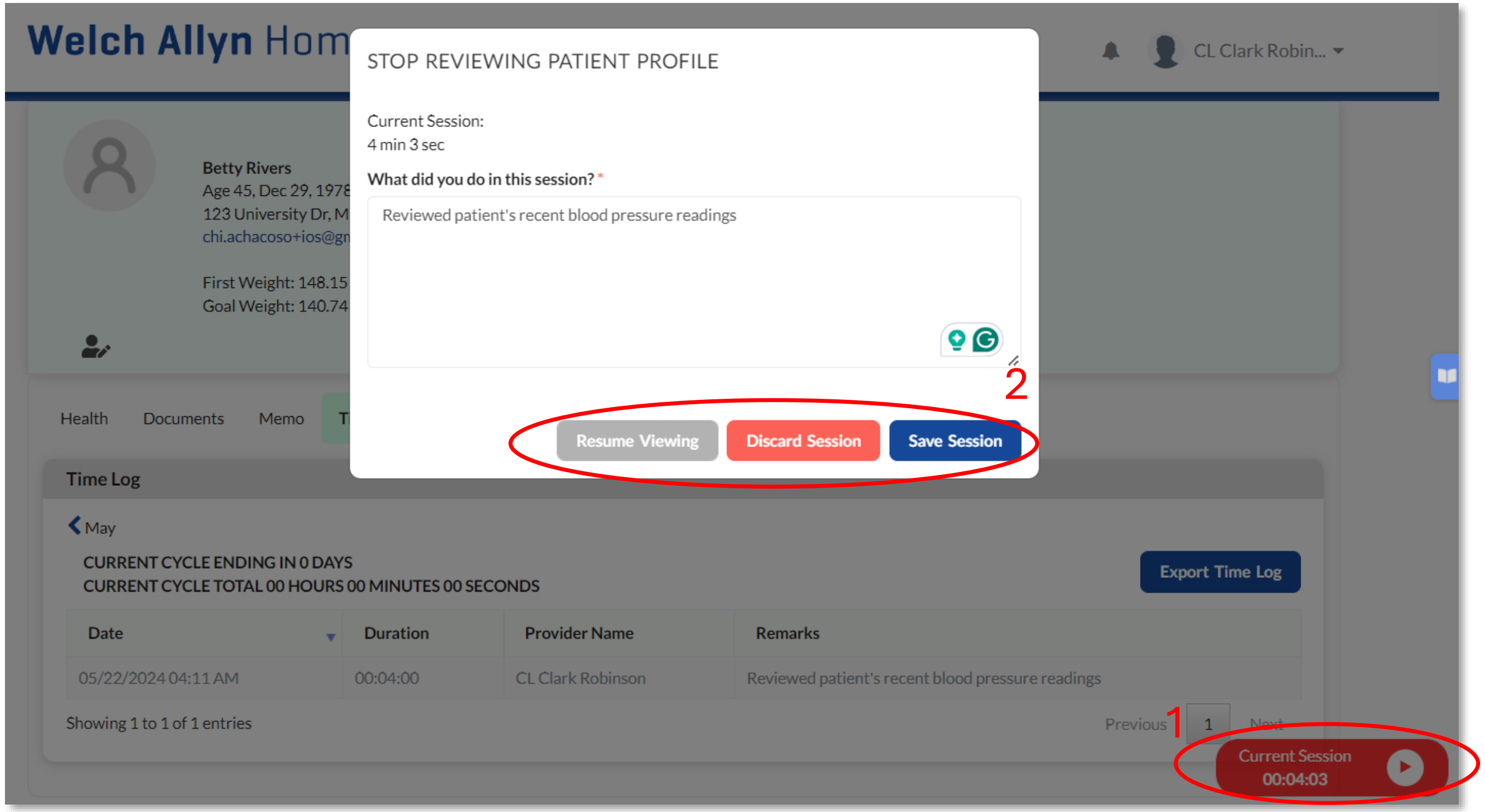
Save or Discard a Timed Patient Review Session

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.



Welch Allyn Home

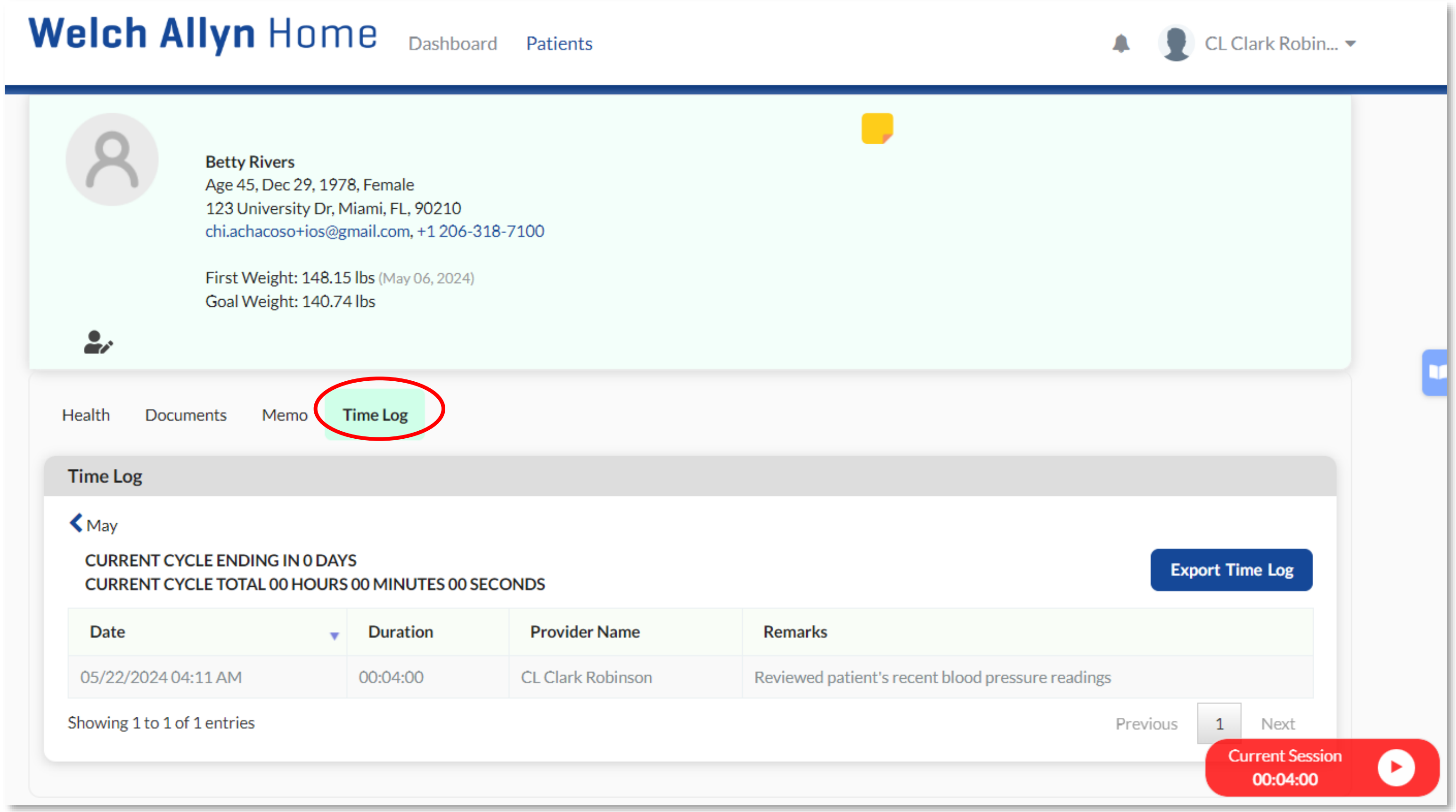
Viewing the Time Log and Notes

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.



Welch Allyn Home

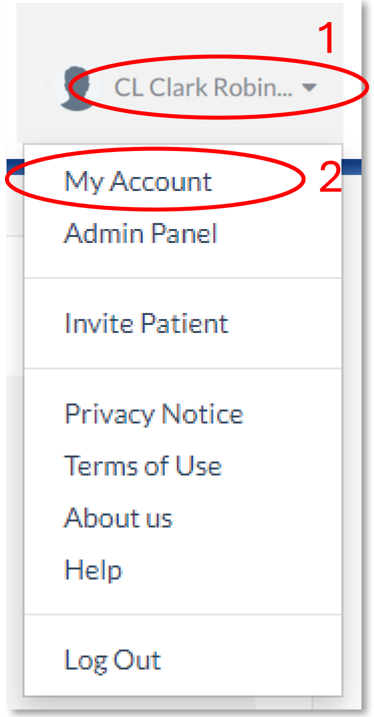
Setting General Risk Notification for Patients

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.

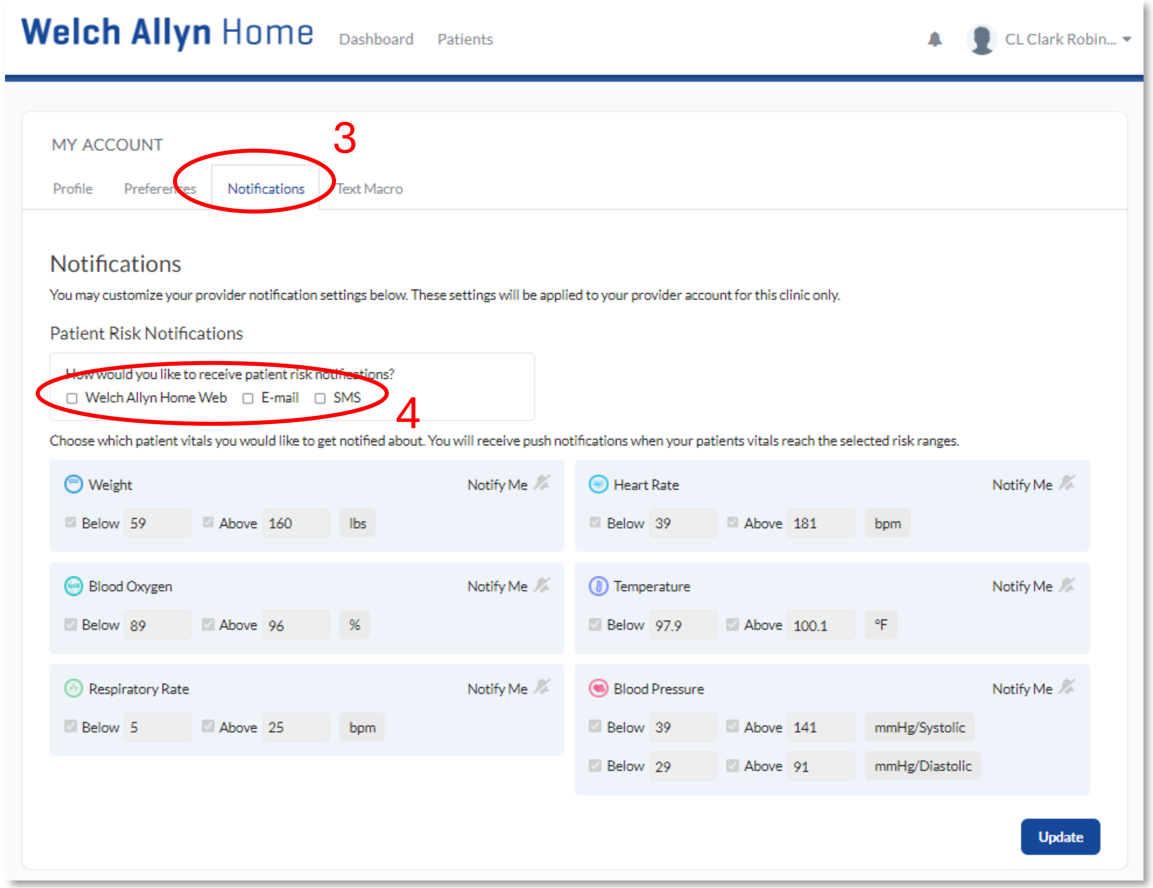
2 - Click **My Account**.



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)



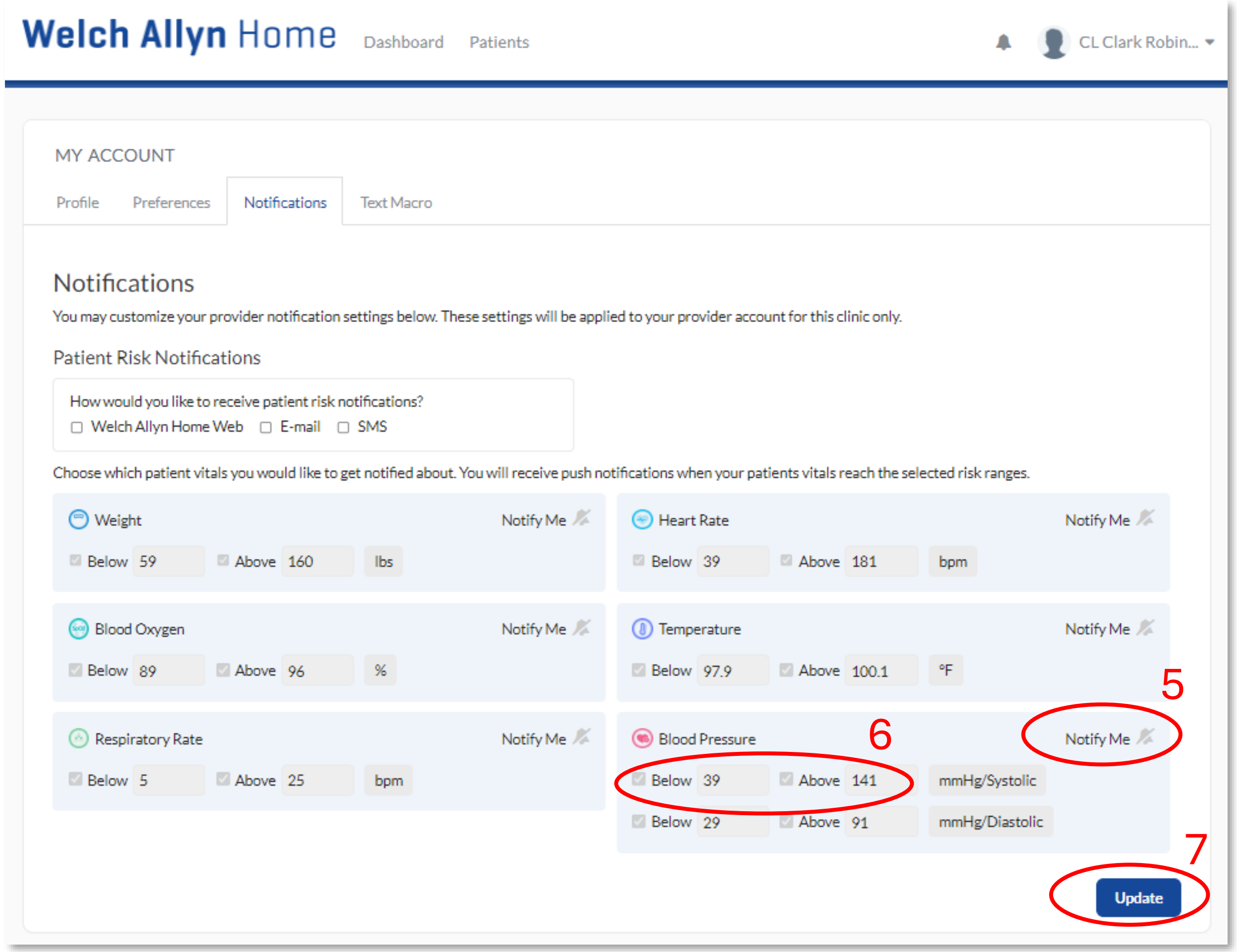
Welch Allyn Home

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.

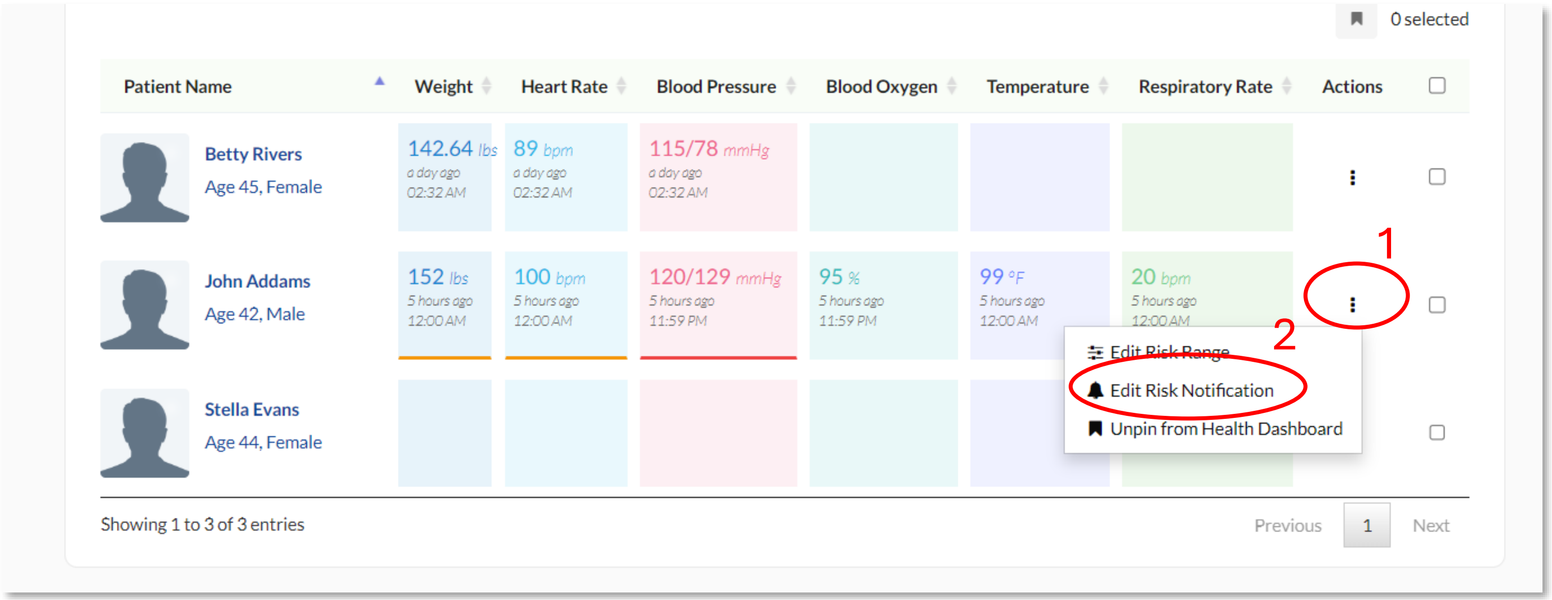


Welch Allyn Home

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.



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**.

Welch Allyn Home

Changing Notification Ranges for Individual Patients – cont'd

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

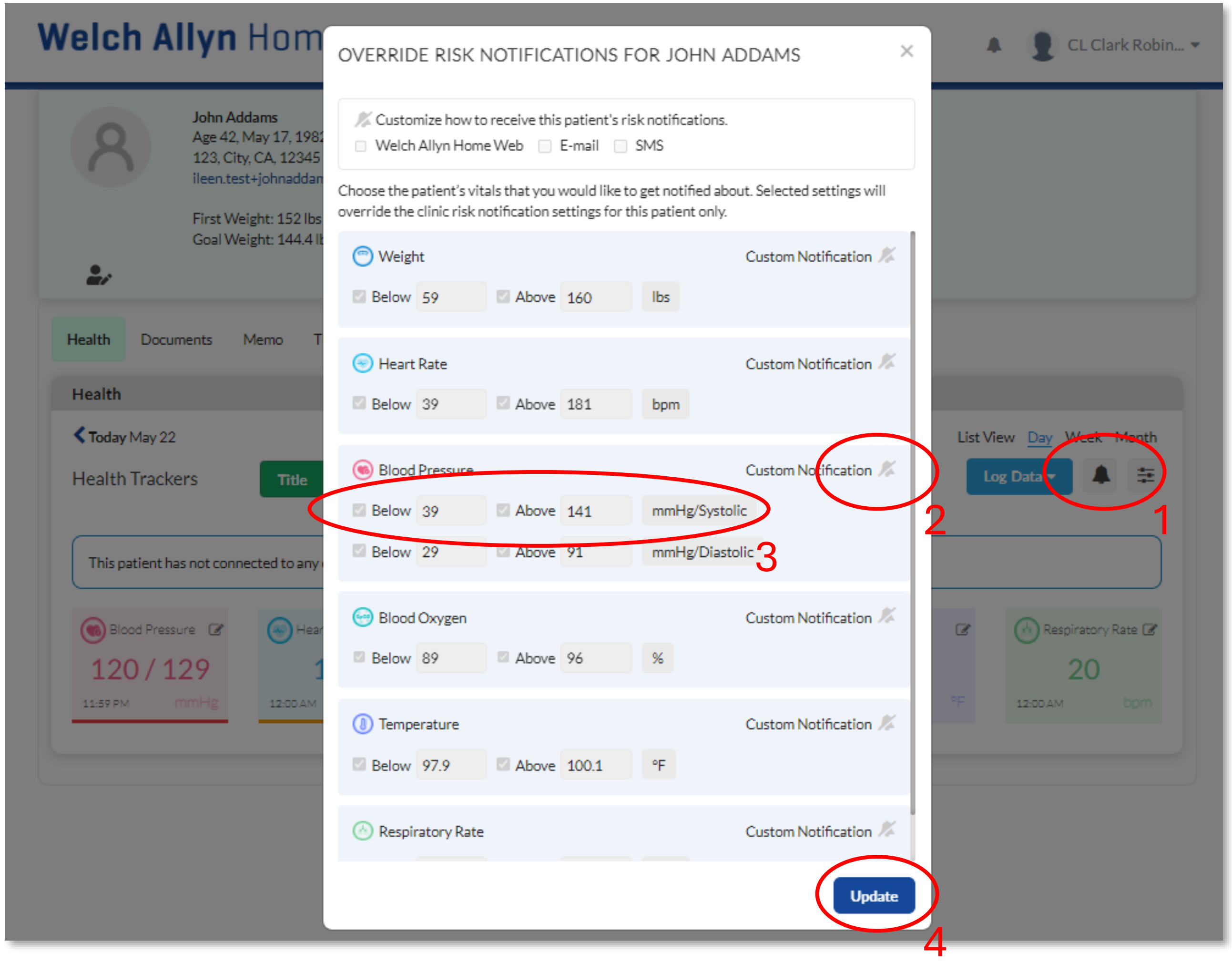
1 - Click on the **bell** next to Log Data.
The *Override Risk Notifications for [patient name]* appears.

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**.



Welch Allyn Home

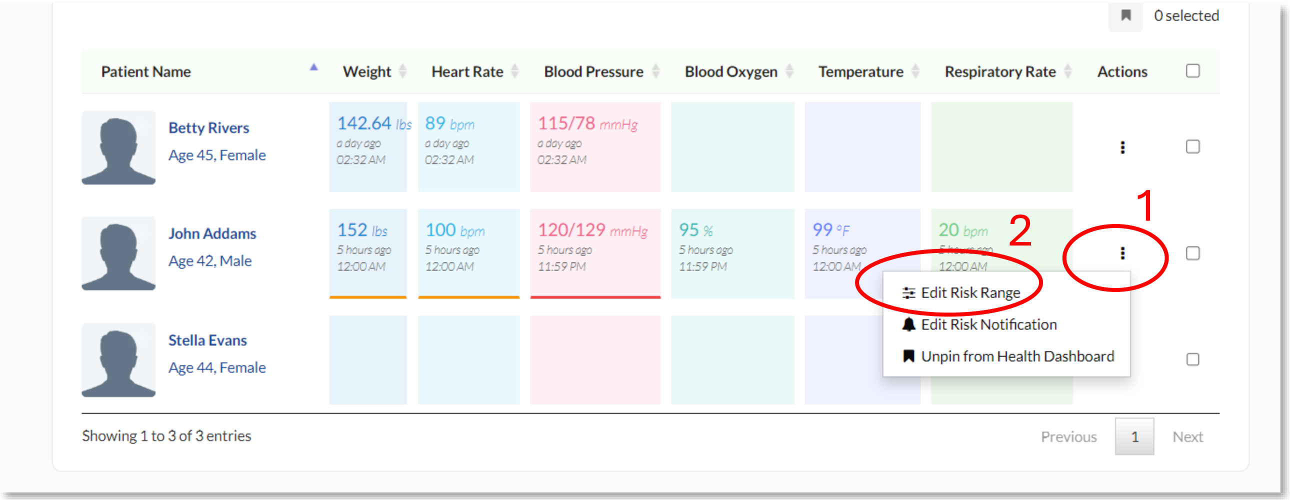
Changing Risk Ranges for Individual Patients

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**.



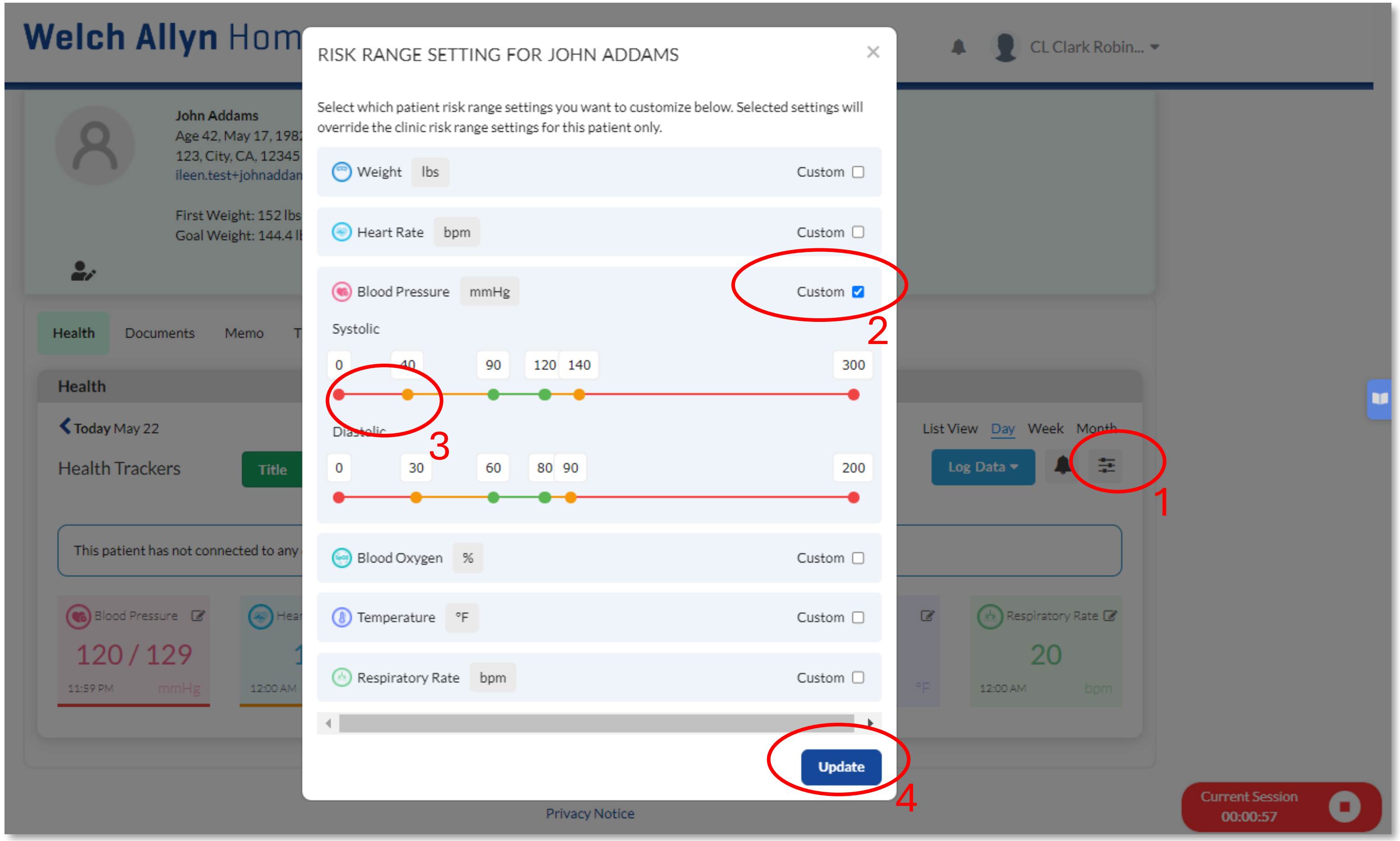
Changing Risk Ranges for Individual Patients – Cont'd

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

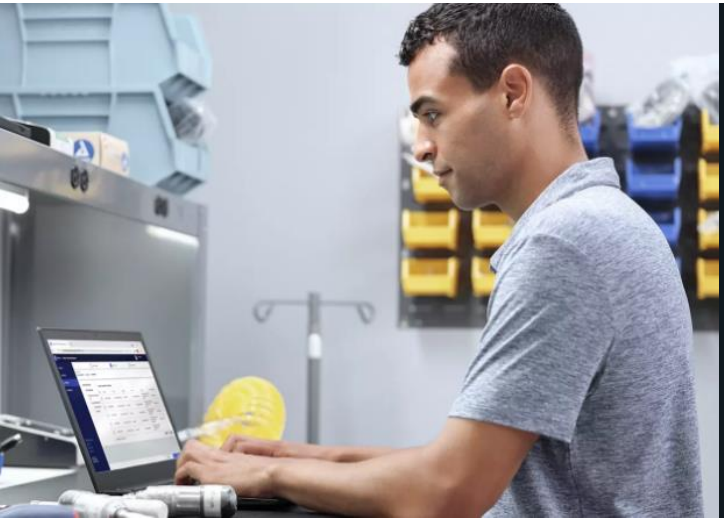
Click on the **slider** next to the bell.
The *Risk Range Setting* for the patient appears.

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.

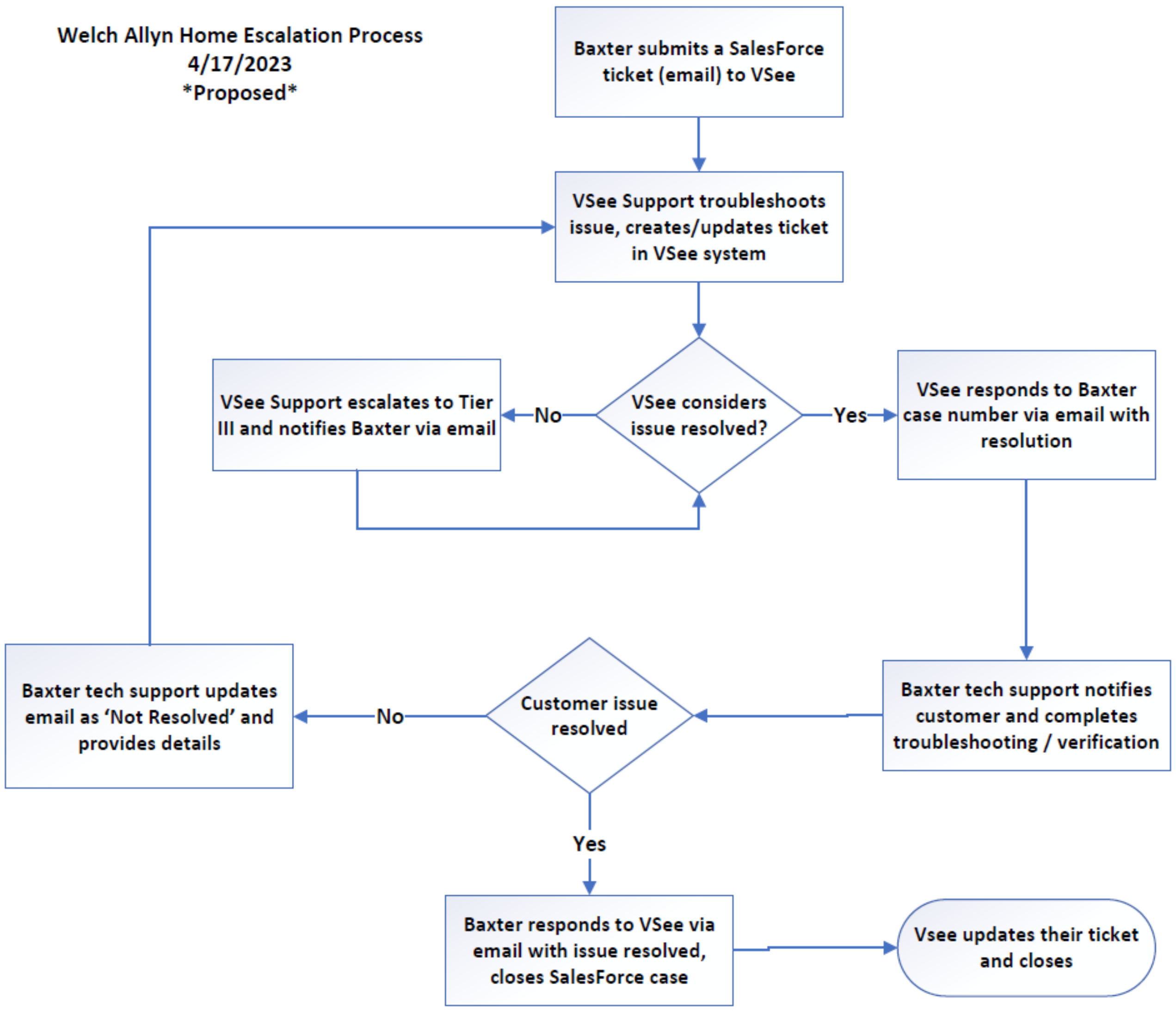


Welch Allyn Home



Welch Allyn Tech Support

Escalation Path



Welch Allyn Home

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

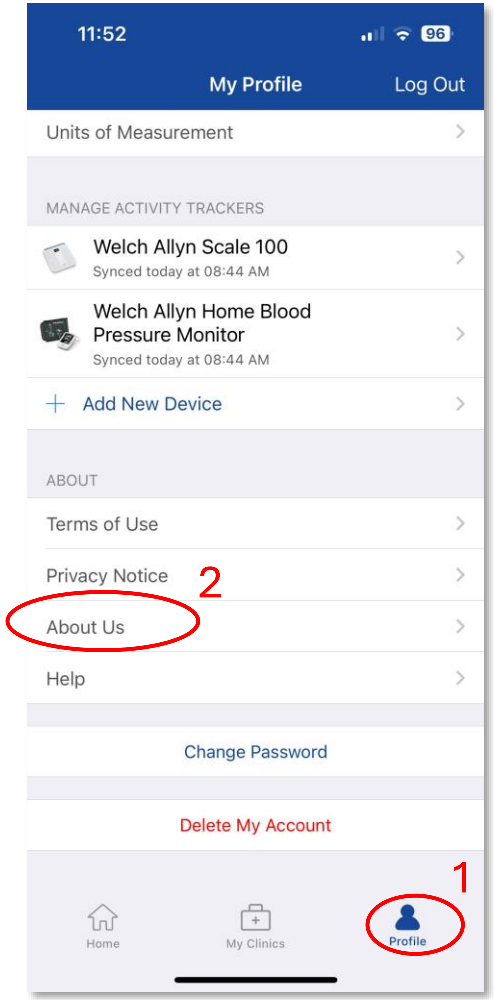
- Once the Clinician/Provider invites a Patient, the patient will receive a notification in their App that the Clinician wants to follow their readings.
- The patient must accept this notification in the App for the Clinician to be able to see their data.
- Patient status in the Portal:

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

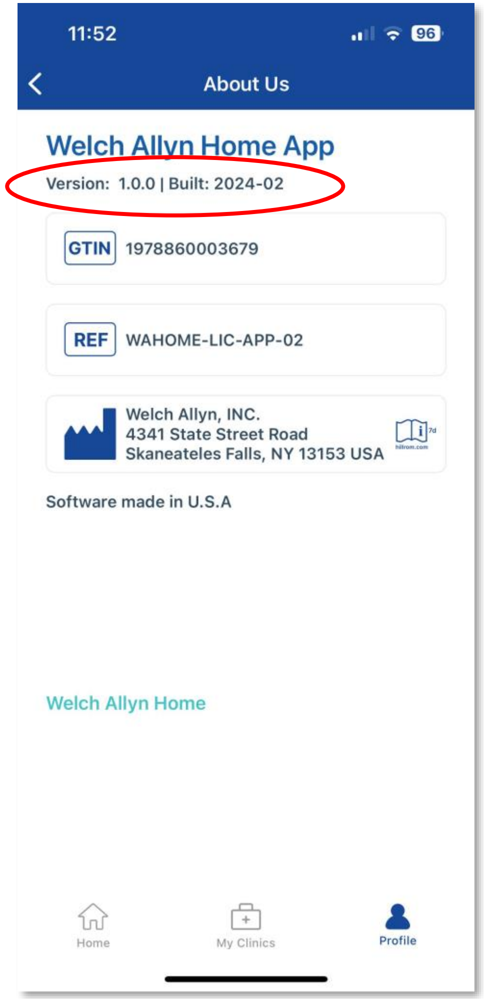
- Once the patient has accepted the request, the clinician can access the patient’s details in the portal.

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**

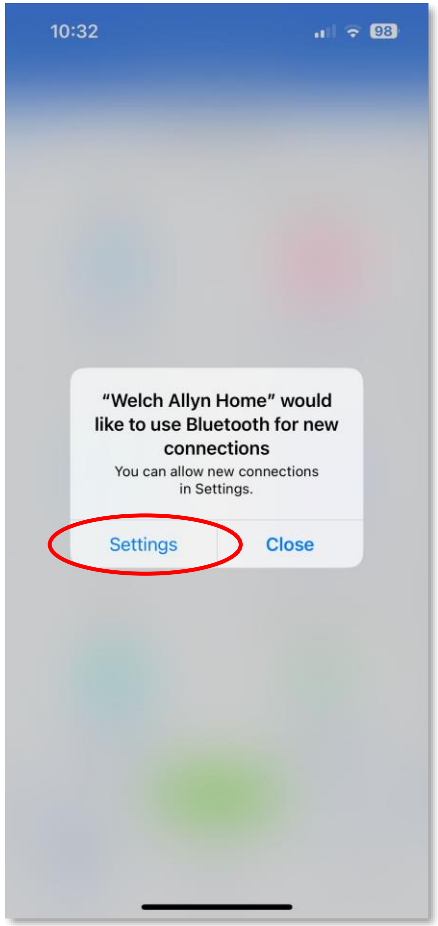


The version number is right below the Welch Allyn home app logo

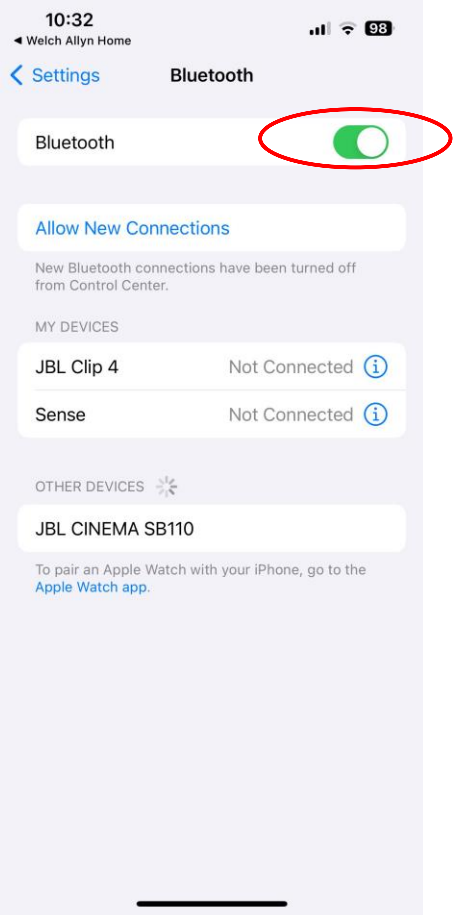
Welch Allyn Home

Bluetooth

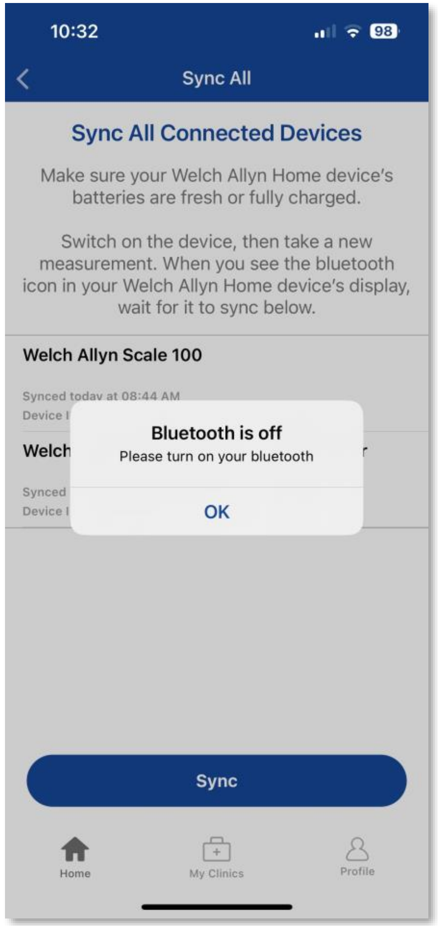
- If BT is switched off in the phone, the App will ask the user to switch it on. It will only do this if the user attempts to sync readings
- The device and phone need to be near each other (within 5 feet / 1.5m).
- Pair in the App, not the phone settings!
- The device will NOT show up in the phone's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

Welch Allyn Home

Device Pairing and Syncing

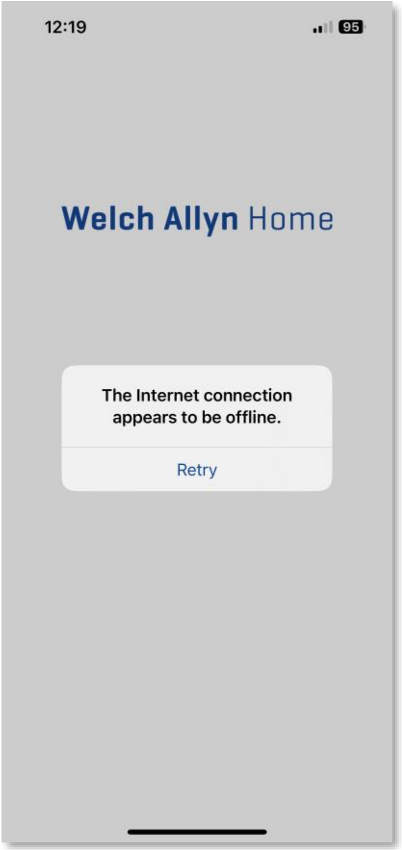
If pairing or data transmission fails, try this:

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.

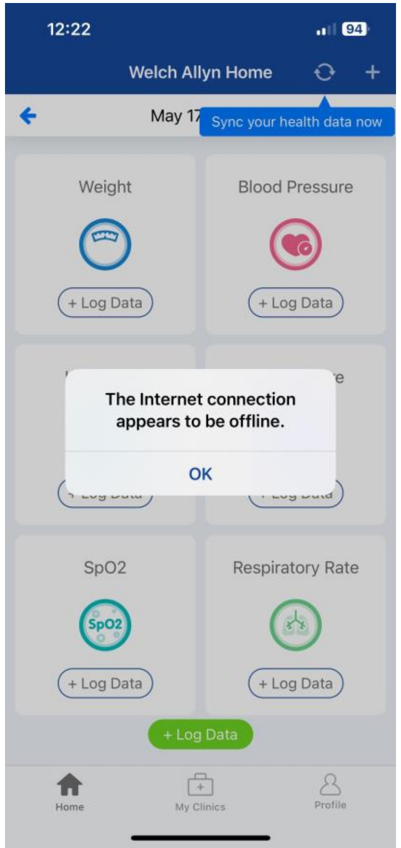
Note: A variance range of +/- 0.1 exists between the scale reading and app display for weight due to the conversion formula between kilograms and pounds.

Internet Connection on the Phone

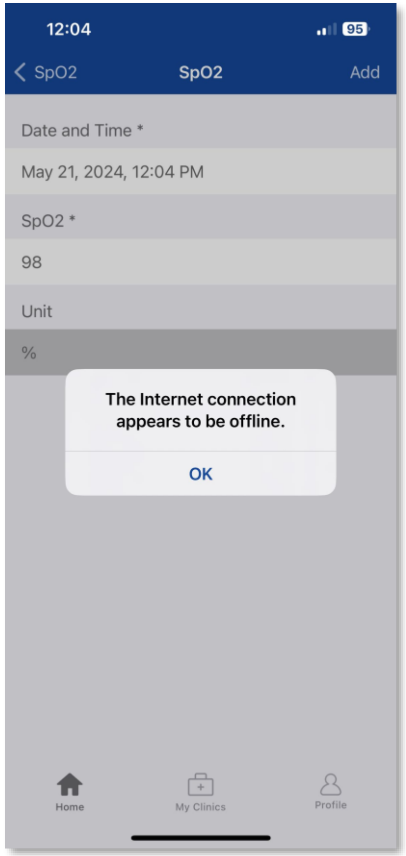
- In order to install or communicate with the Cloud-based Welch Allyn Home system, the phone needs to have Internet access.
- Access to data would be limited, pop-ups showing internet connection is offline, and prompts to turn on data would be shown.
- Verify if internet connection is available by navigating 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 rset 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:

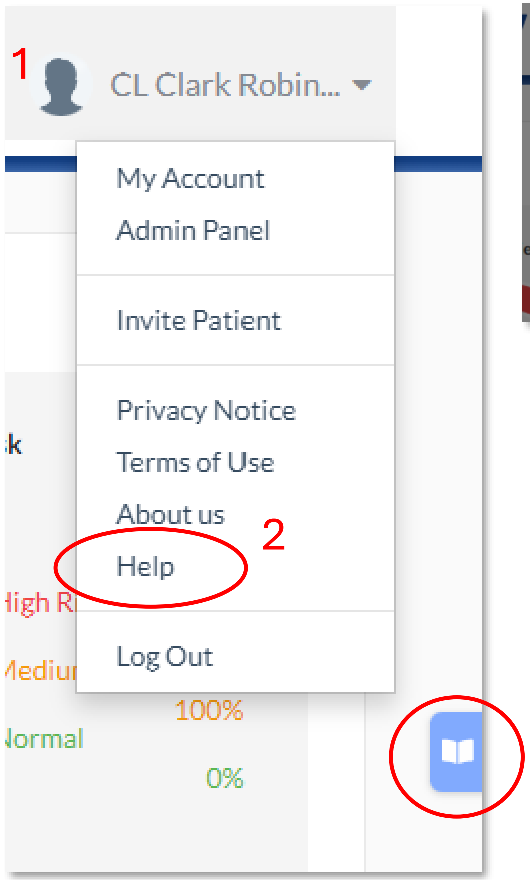
"Other" tab on home screen, or "Clutter" or "Junk" in desktop and web versions.

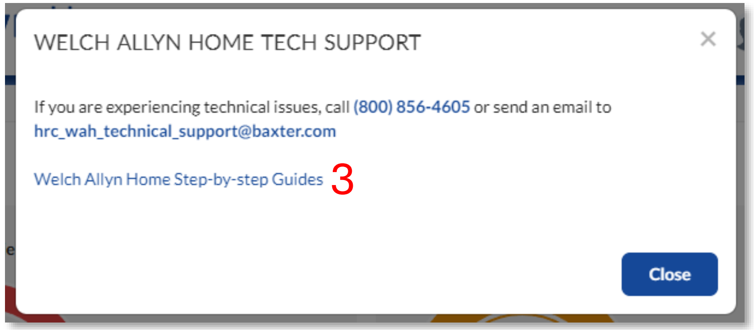
- Android Gmail app: "Promotions" folder
- iOS mail app: "Junk e-mail" folder
- There are other mail apps, each may do this slightly differently.

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

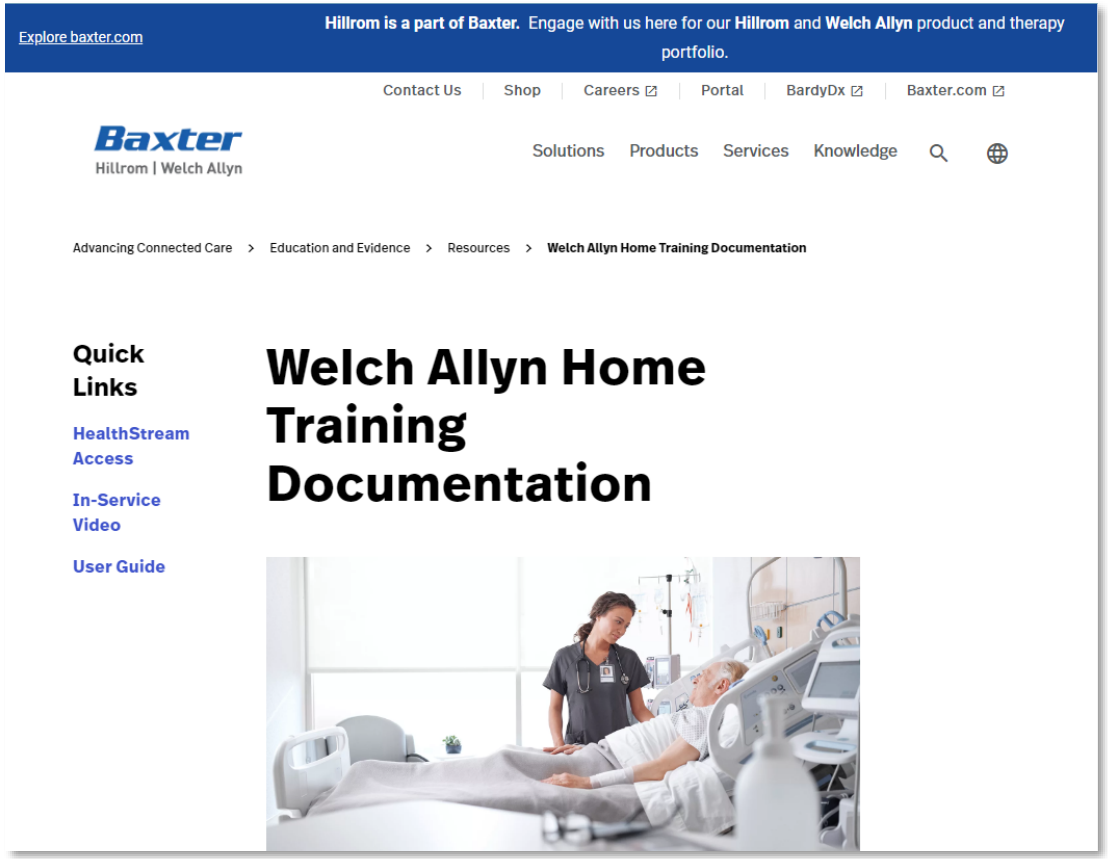




Help
1 - Click name on the right side of the menu bar
2 - Click **Help**
3 – Click **Welch Allyn Home Step-by-step Guides**

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.

Welch Allyn Home

Sales Rep

Sales Rep Workflow

[START]

Demo WAH Clinic Portal:
https://demo.welchallynhomecp.com/providers/login

Sign up for an Individual Test Clinic Admin Account on UAT:

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

Provide Live Clinic Setup Link to Practice Owner (Administrator):
https://clinic.welchallynhomecp.com/pages/clinic_trial?template_code=wahprovider

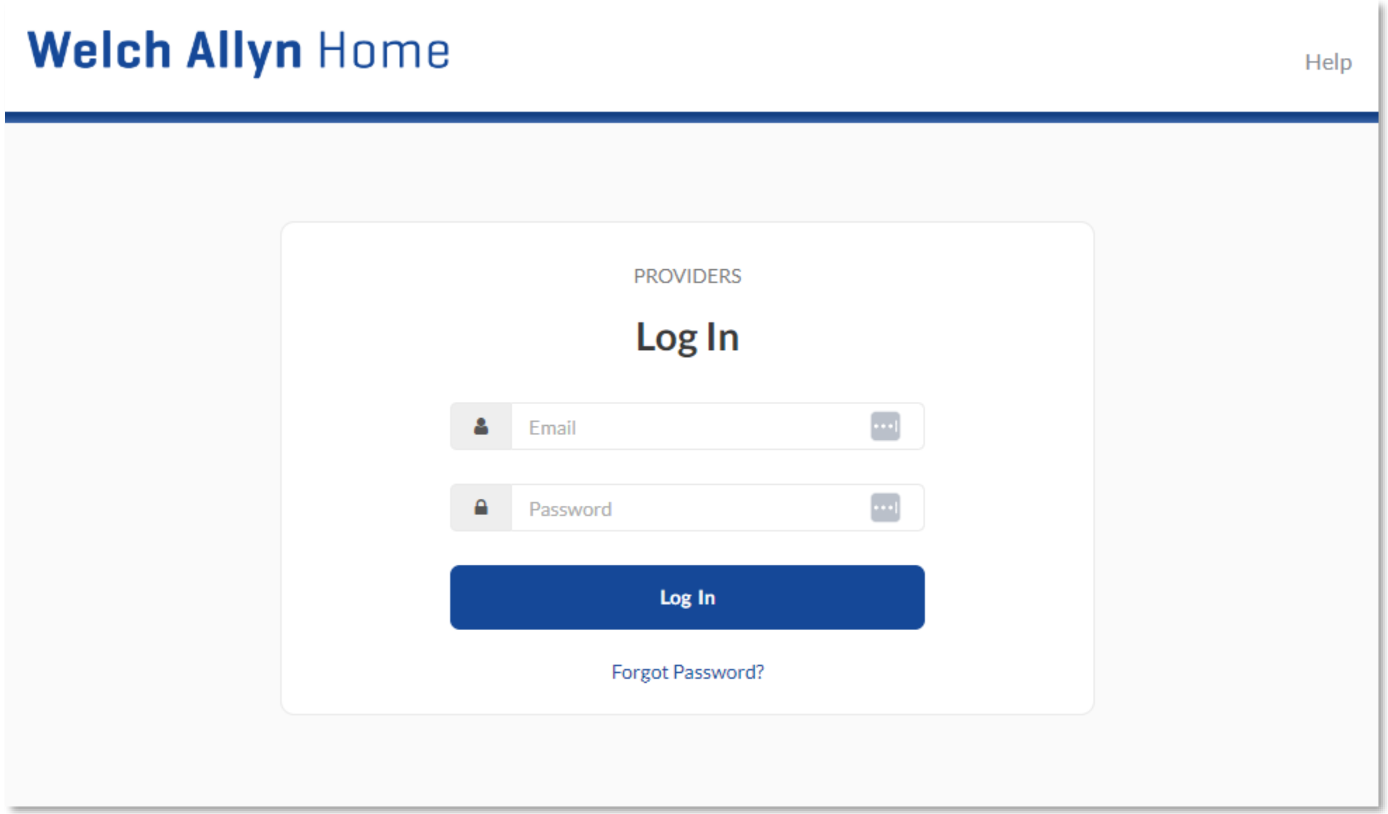
Assist Practice Owner (Administrator) in Setting up the Clinic and in Getting Started

Welch Allyn Home

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



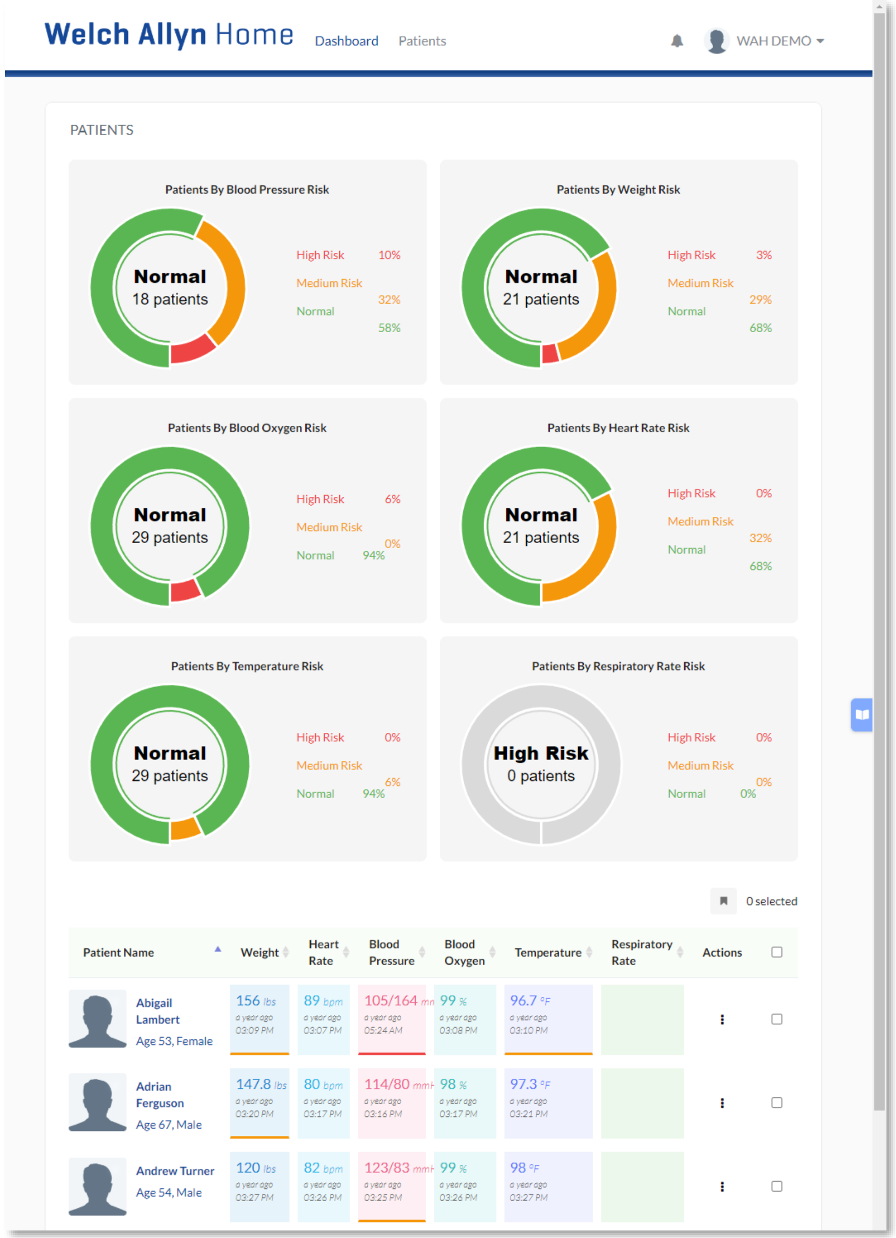
Enter the username and password

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.

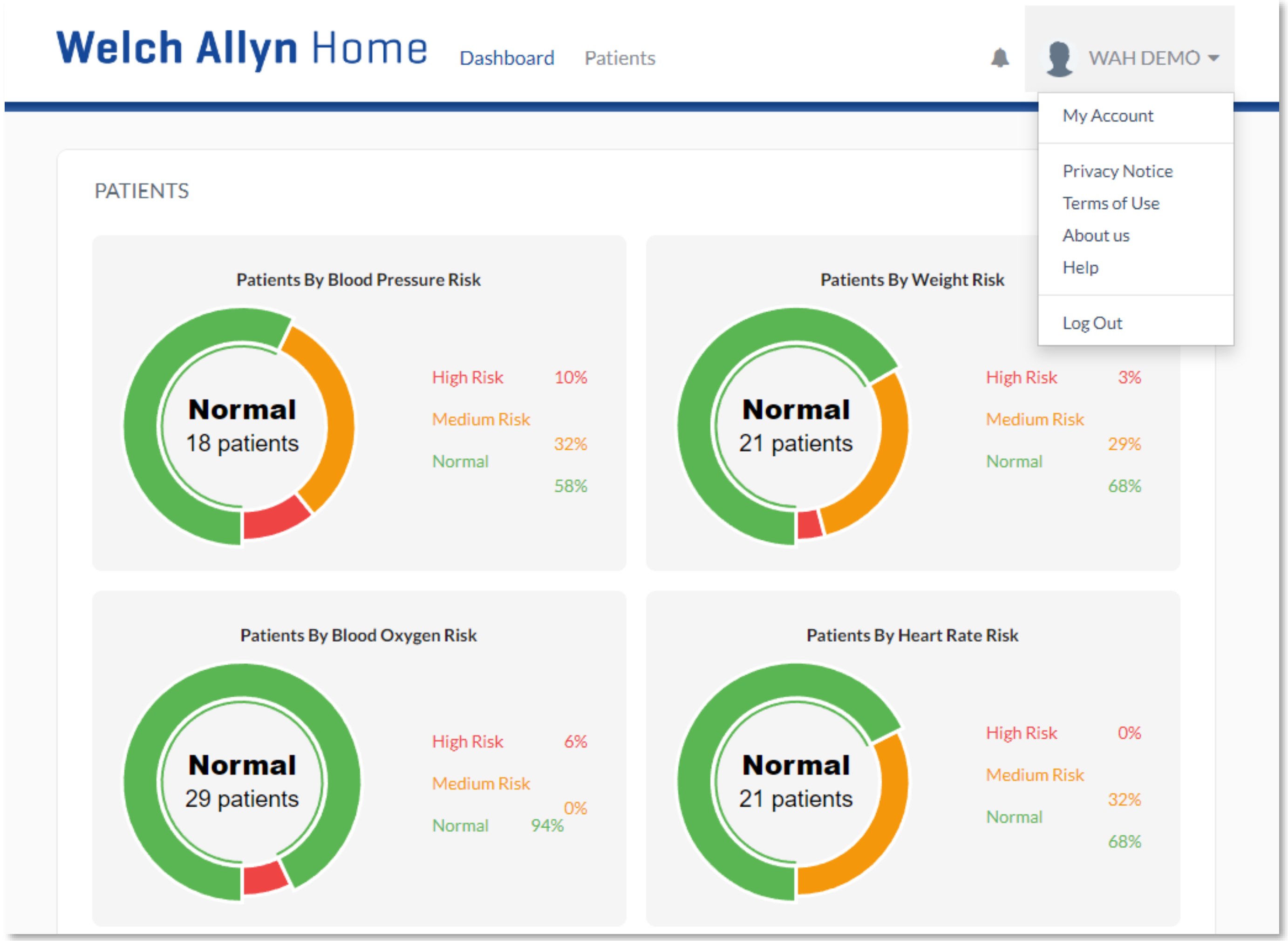


Limitation

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/health~~ demo.welchallynhomecp.com https://demo.welchallynhomecp.com/providers/login Username: wah_demo@baxter.com Password: WahD3M0!	- 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	- 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	- When the Clinic Admin is ready to create an account

Welch Allyn Home