

# Upstream Engage

Video  
Consultation  
Complete  
User Guide



Supporting patients  
to connect from  
their own homes

upstream.health 

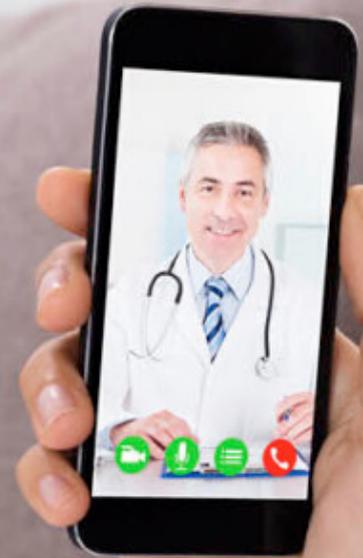
# How it works

Upstreams Engage solution provides patients with the opportunity to connect to their care team from the comfort of their own home.

Care teams can either book on the patients behalf, or make available bookable 'slots' for patients to book themselves.

At the allotted time patients log in to a virtual waiting room to be seen. Either through the Engage app or just in their mobile or laptop browser via the 'Quick join' link.

Clinicians use the Collaborate mobile application or clinical portal, to start the video consultation and record the consultation notes in real time.



## Option 1 : Quick join



Care team book appointment



Engage Quick Join invite sent



Patient joins from any device, directly from link

## Option 2: Enhanced



Care team publish availability



Patient books appointment



Enhanced support and video through Engage App

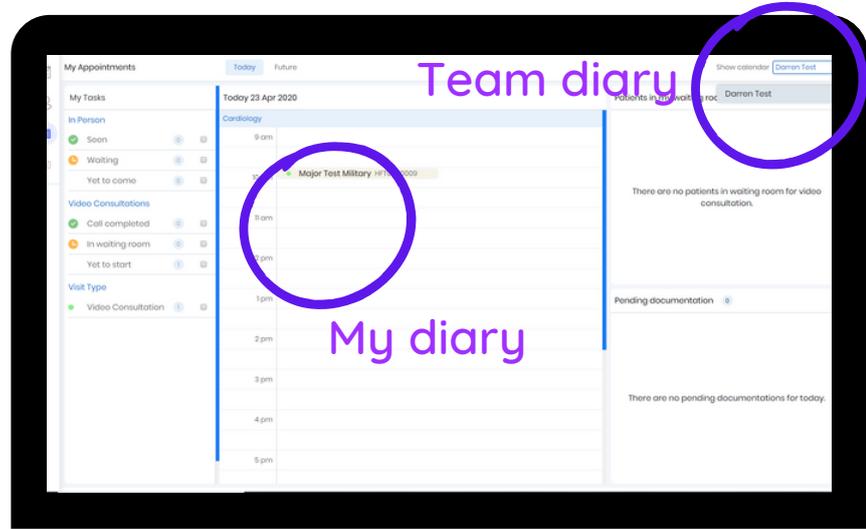


# Book initial consultation

How clinicians make booking for patient

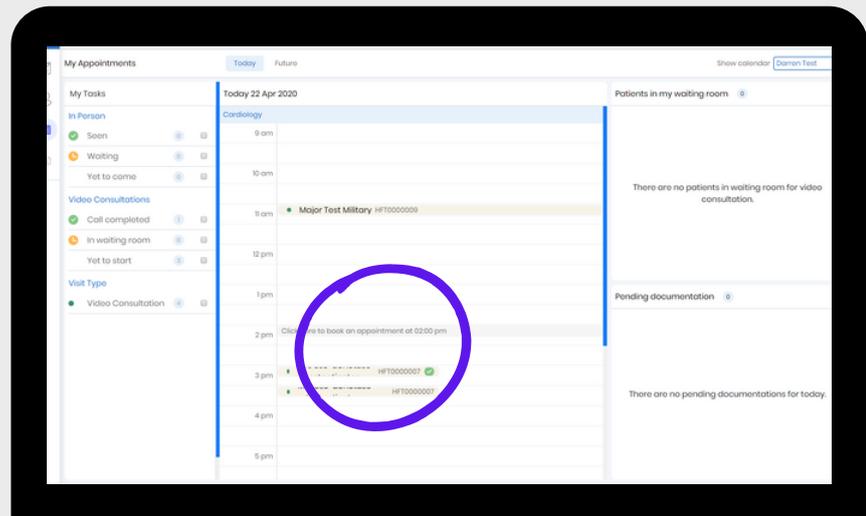
## Step 1

Login to Clinical Portal and access your diary or select drop down to select team members diary



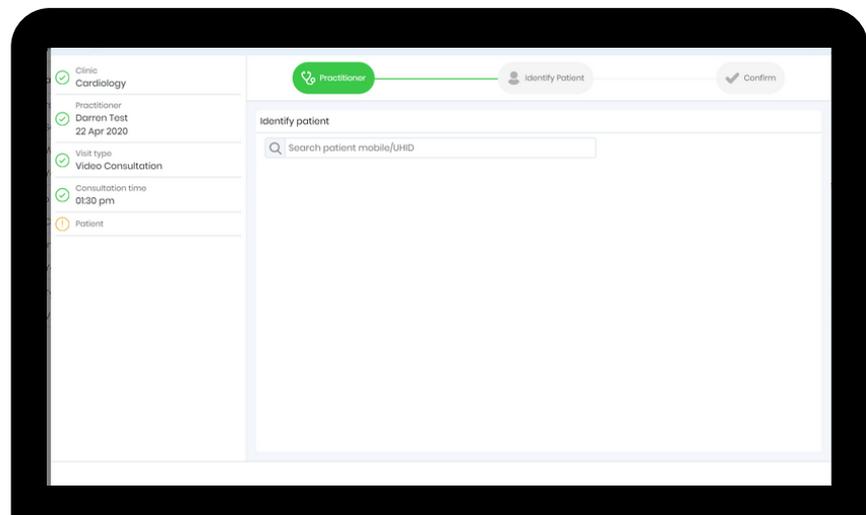
## Step 2

Hover over the appointment slot and select to make booking



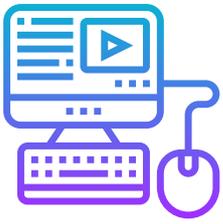
## Step 3

You now have the majority of information auto populated



Next step, next page

For clinician

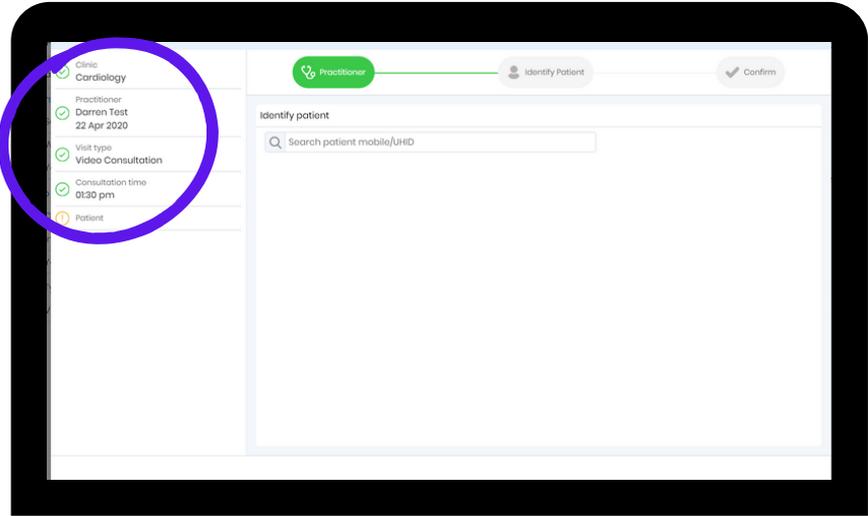


# Book initial consultation

How clinicians make booking for patient

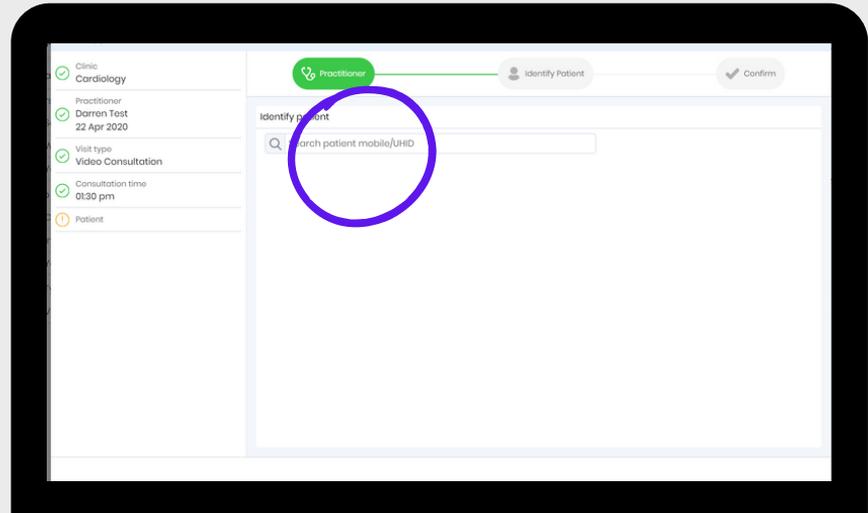
## Step 4

Validate the auto populated information.  
(tip : You can always change the clinician if needed)



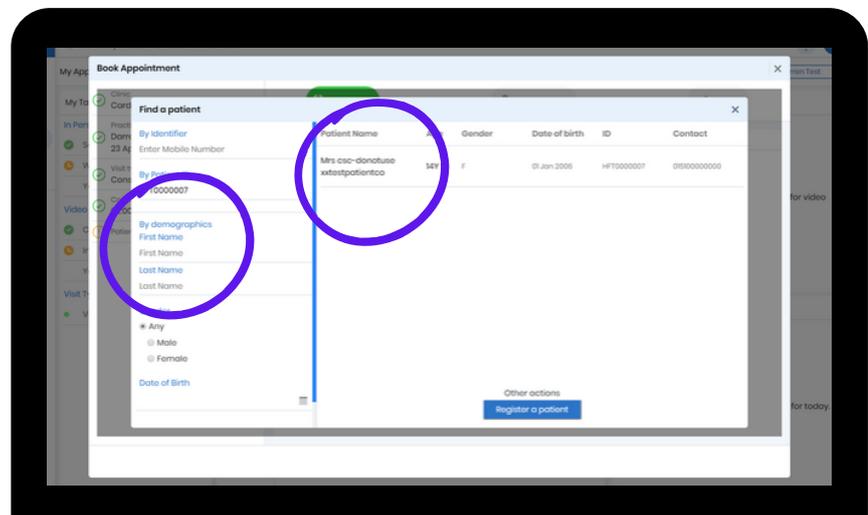
## Step 5

Enter the patient ID to search for your patient



## Step 6

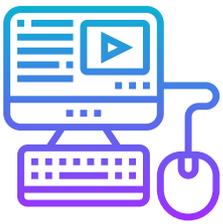
Results are displayed, and all you need to do now is click on your patient.  
You can use other search options as needed.



Next step, next page



For clinician



# Book initial consultation

How clinicians make booking for patient

## Step 7

Once patient is selected you just need to check or enter number then click on confirm appointment.



Book Appointment

Practitioner: Darren Test, 22 Apr 2020

Visit type: Video Consultation

Consultation time: 01:30 pm

Patient: Mrs csc-donotuse xtestpatientco

Confirmation

Appointment details: Darren Test, Cardiology, Wednesday April 22, 2020, 01:30 pm - 01:45 pm

Patient Details: Mrs csc-donotuse xtestpatientco, HF1000007

Send appointment text message to: +44 789005471

Confirm Appointment

## Step 8

On confirmation the appointment is added into the clinicians calendar...



My Appointments

Today 23 Apr 2020

Patients in my waiting room: There are no patients in waiting room for video consultation.

Pending documentation: There are no pending documentations for today.

Appointment: Mrs csc-donotuse xtestpatientco, HF1000007, 13:00

## Step 9

... and a text message with joining details is automatically sent to the patient (including clinician name)



A video consultation has been booked for with clinician name on 31/03/2020 13:00-14:00. To join you don't need to install anything. Just click on this -> [Start consultation link](#)

10 minutes before your appointment time from a mobile phone, tablet or laptop chrome browser.

For clinician

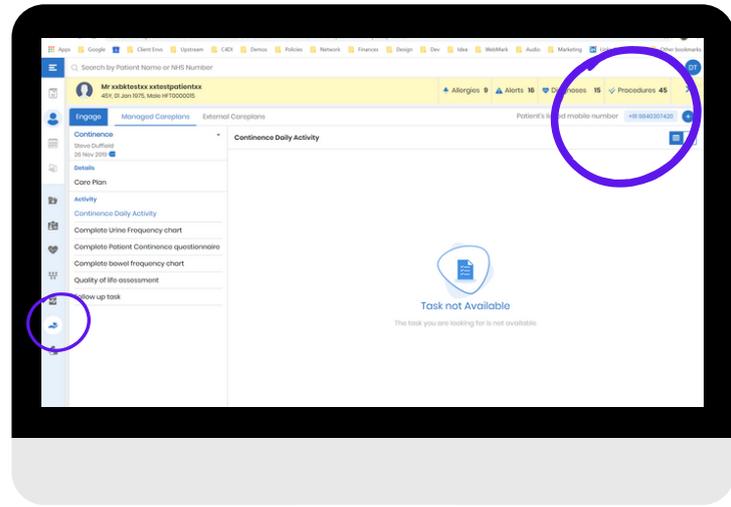


# Linking patients to Engage

How to link a patient record to their app

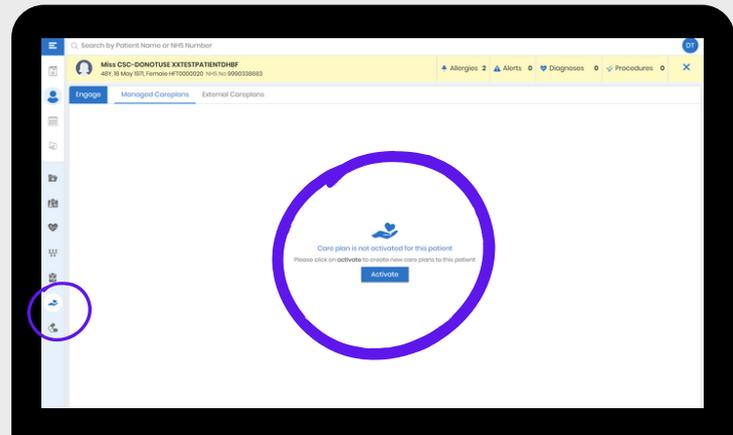
## Step 1

When a patient registers for the Engage application, they enter their mobile number. If this matches a number in the portal they are automatically linked.



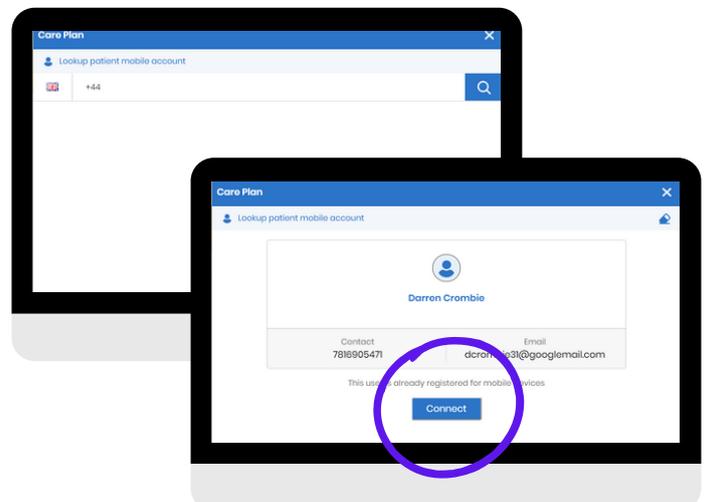
## Step 2

If their mobile number was not found you need to manually link them. To do this just find their record in portal and select activate form the Engage tab.



## Step 3

Now just search for their mobile phone number. Confirm it's the right patient returned then click connect. Done. Simple.



For clinician

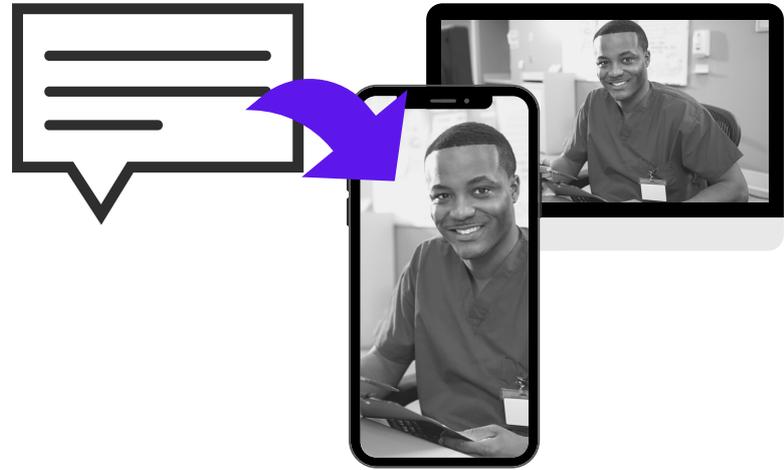


# Complete 'Quick link' meeting

How to log in to meet your clinician

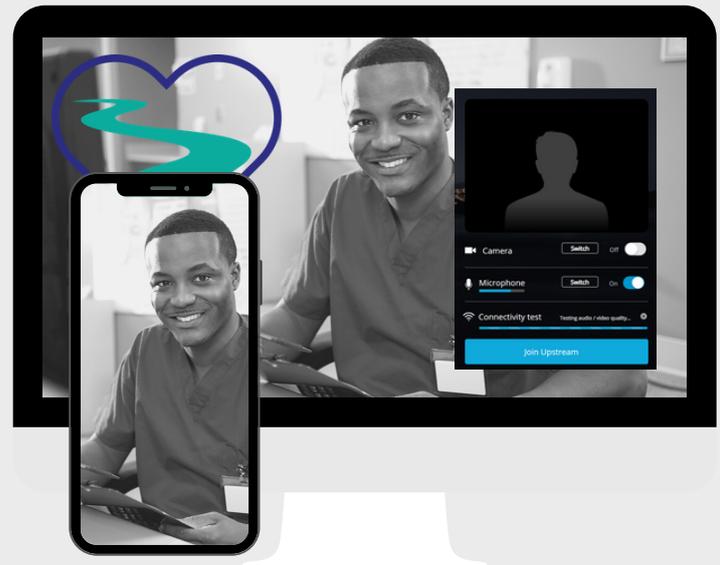
## Step 1

Open up link on mobile phone browser or copy link to your computer browser (with web cam). Please join 5 mins before the start.



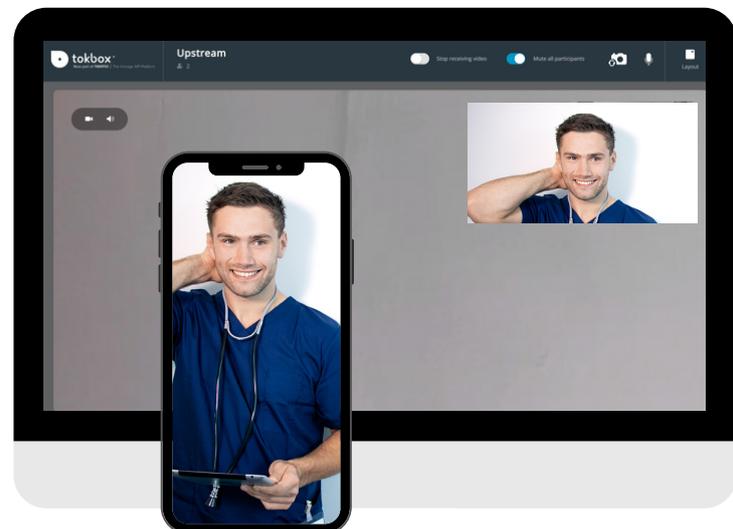
## Step 2

You can now test and turn on your video and audio. Then just click join, accept the terms and conditions and your session will begin!

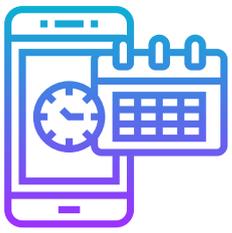


## Step 3

You can now complete your consultation with your clinician. If for any reason you lose connection just refresh your browser.



For patient

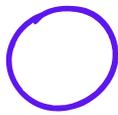


# Book appointment

How patients make their own booking

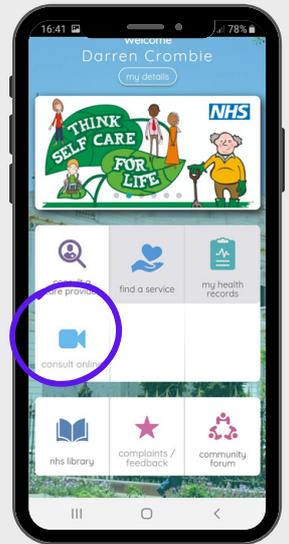
## Step 1

Login to the Engage patient application



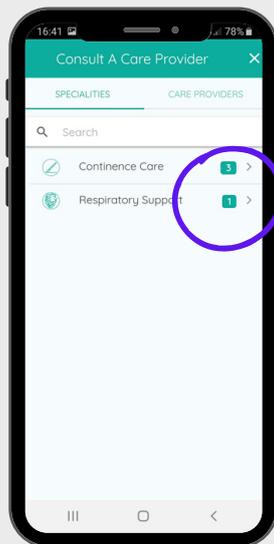
## Step 2

Select 'consult a care provider' and then select 'consult online'



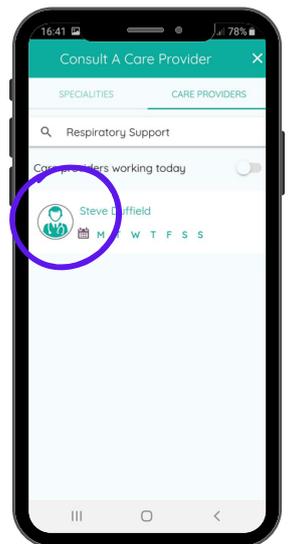
## Step 3

Select the speciality that your clinician is in



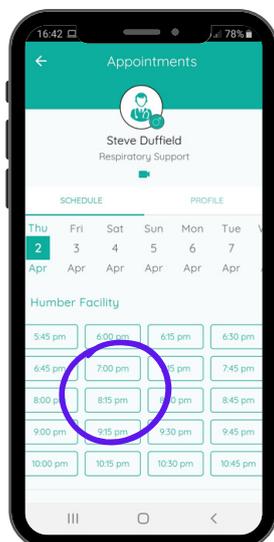
## Step 4

Select your clinician



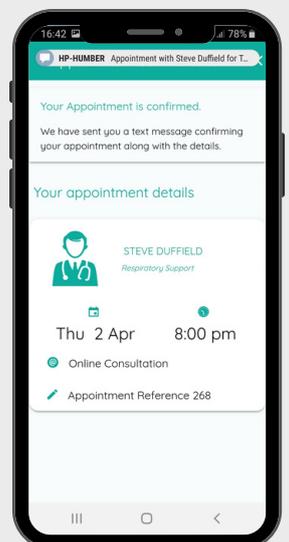
## Step 5

Select the time from the available slots



## Step 6

Receive confirmation of booking and text reminder with details



For patient



# Complete your meeting via app

How to log in to meet your clinician

## Step 1

Login to the Engage patient application



## Step 2

Either select the alerts bell, or calendar



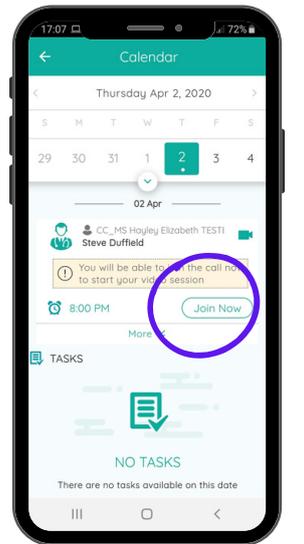
## Step 3A

From alerts Start meeting by clicking on the video screen



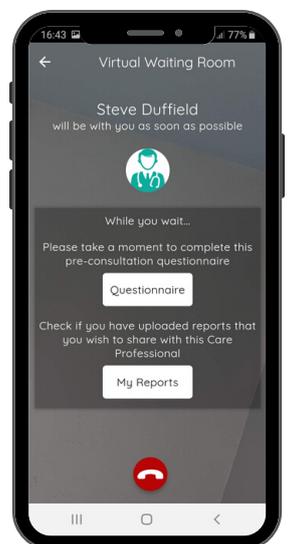
## Or Step 3B

From calendar Start meeting by clicking on 'join now'



## Step 5

You are now in the virtual waiting room. Your clinician knows you are waiting and will be with you shortly. While waiting you can fill in the questionnaire or upload any images you want to discuss.



For patient

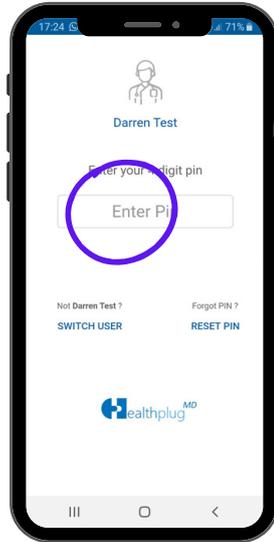


# Complete mobile consultation

How clinicians complete consultation on mobile

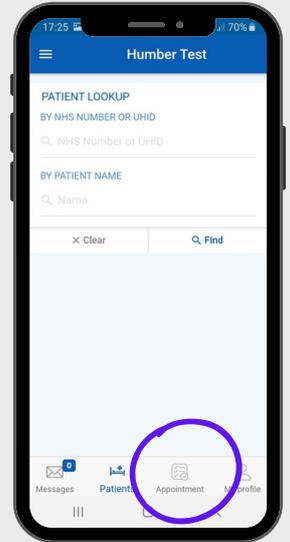
## Step 1

Login to the Collaborate application and enter 4 digit pin



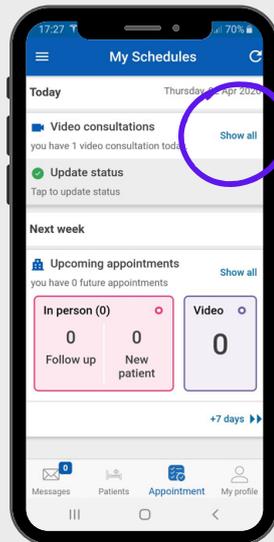
## Step 2

From home screen select appointments



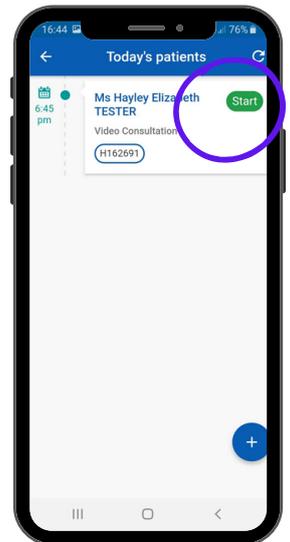
## Step 3

You can now see all your appointment info, and any patients waiting to be seen



## Step 4

See today's appointments and select start when ready



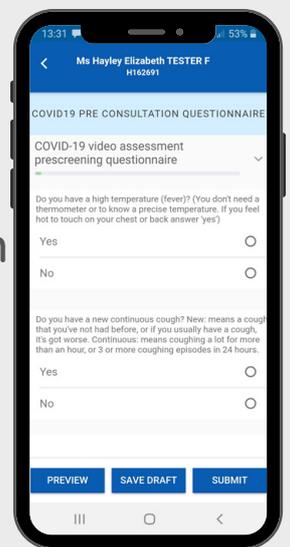
## Step 5

The consultation will now start. You can view the patient record during the call



## Step 6

Finally complete your consultation notes using predefined templates



For clinician

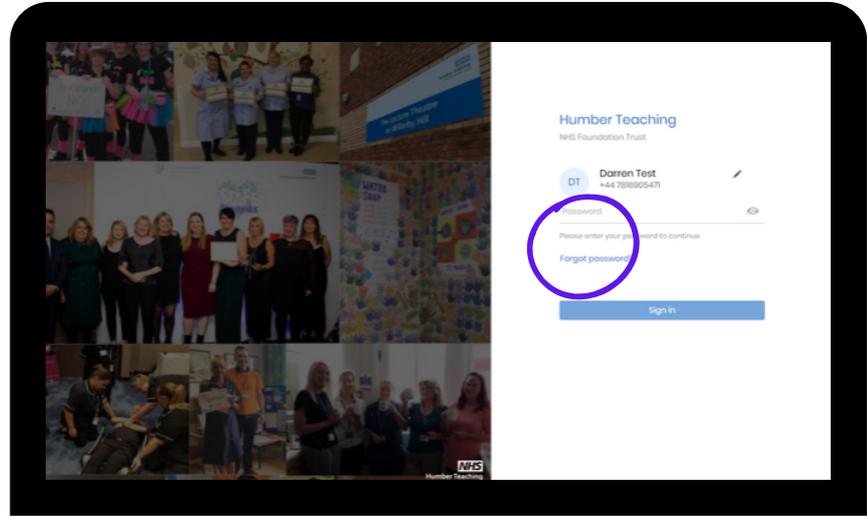


# Complete laptop consultation

How clinicians complete consultation on laptop

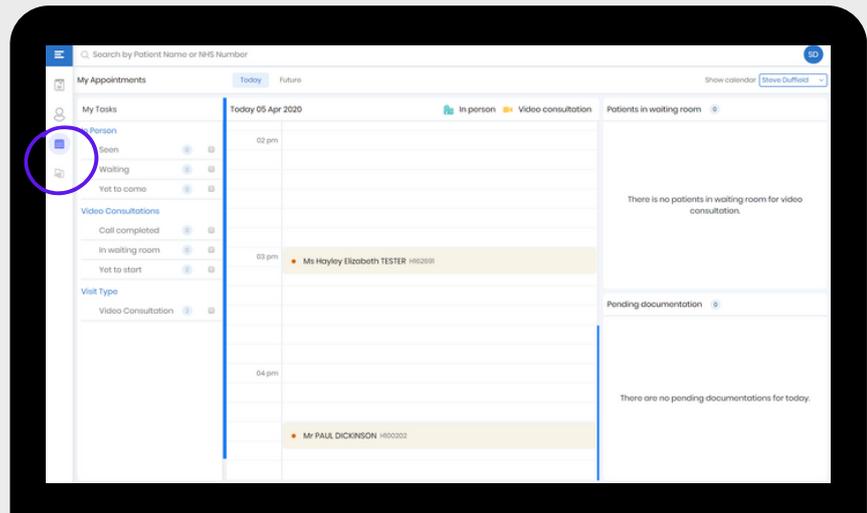
## Step 1

Login to Clinical Portal using your phone number and password  
(Tip : if you forget it just request an OTP)



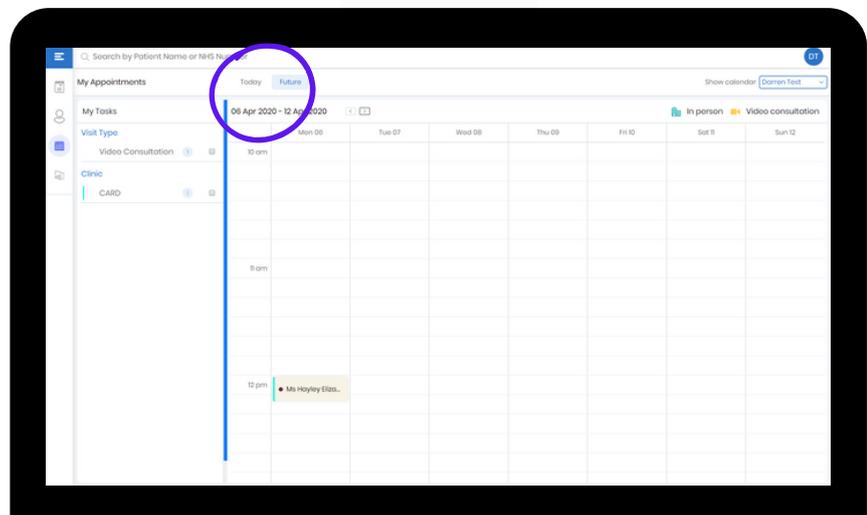
## Step 2

Select your appointments and you will be taken to your calendar for today. You can see your diary and anyone waiting.



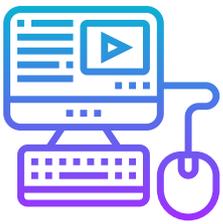
## Step 3

You can use the toggle to look at your future calendar



Next step, next page

For clinician

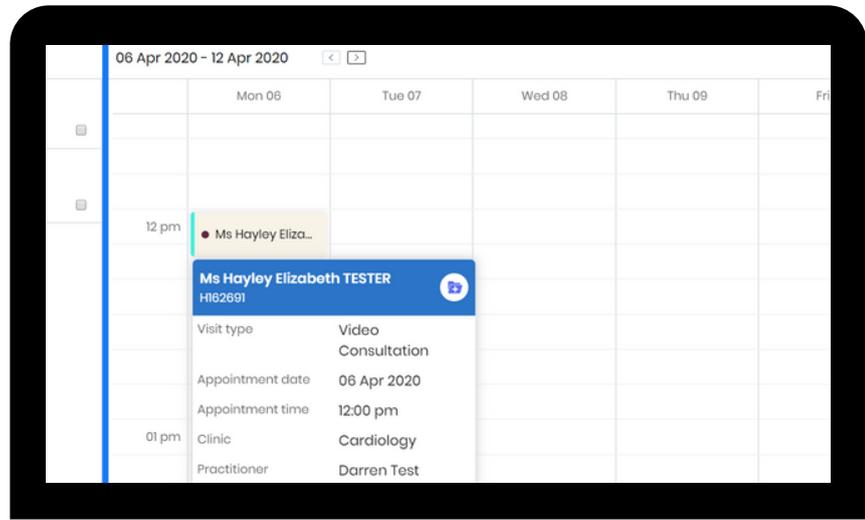


# Complete laptop consultation

How clinicians complete consultation on laptop

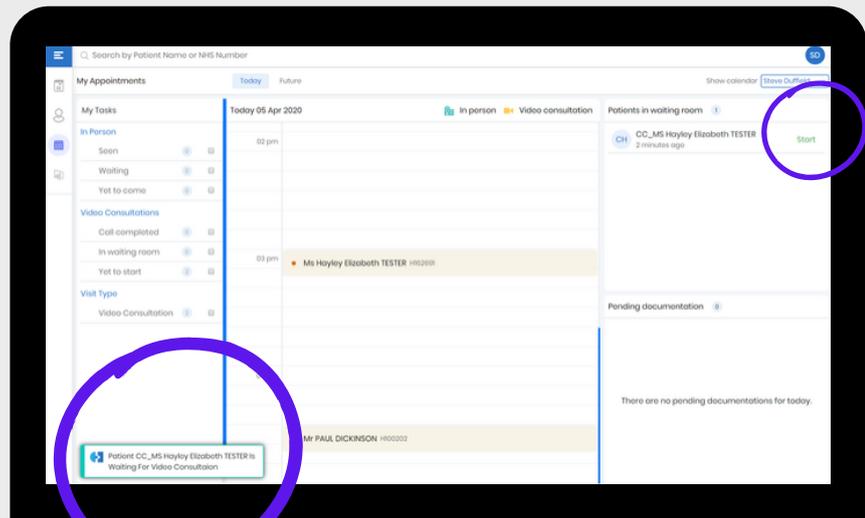
## Step 4

Selecting the patient provides you with additional detail about the patient and appointment



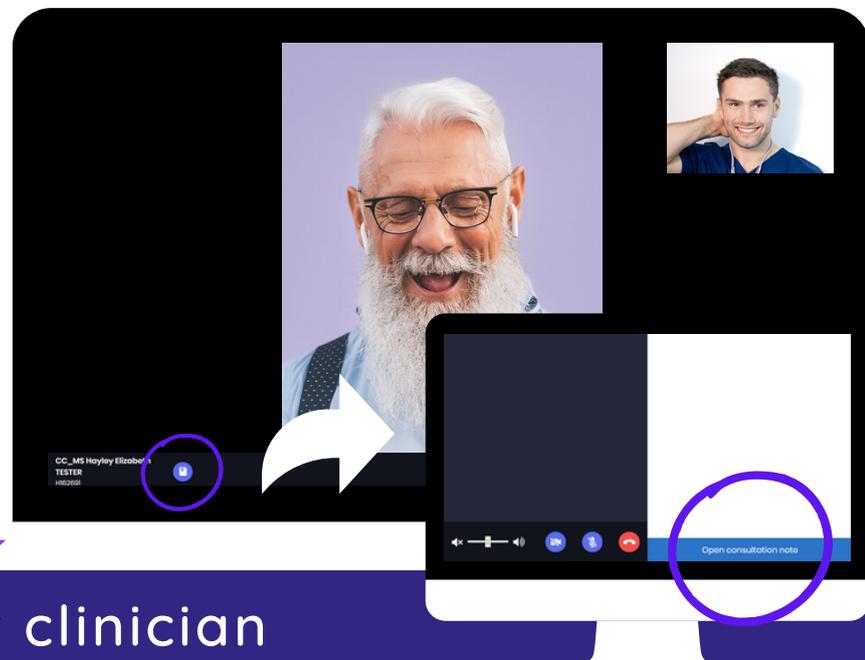
## Step 5

When a patient comes into the waiting room you'll get an alert. Just click 'start' when you're ready.



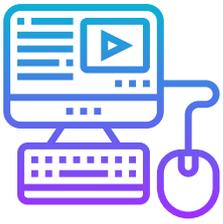
## Step 6

You are now in your video consultation and can meet your patient. You can still view their record, or start a consultation note



Next step, next page

For clinician

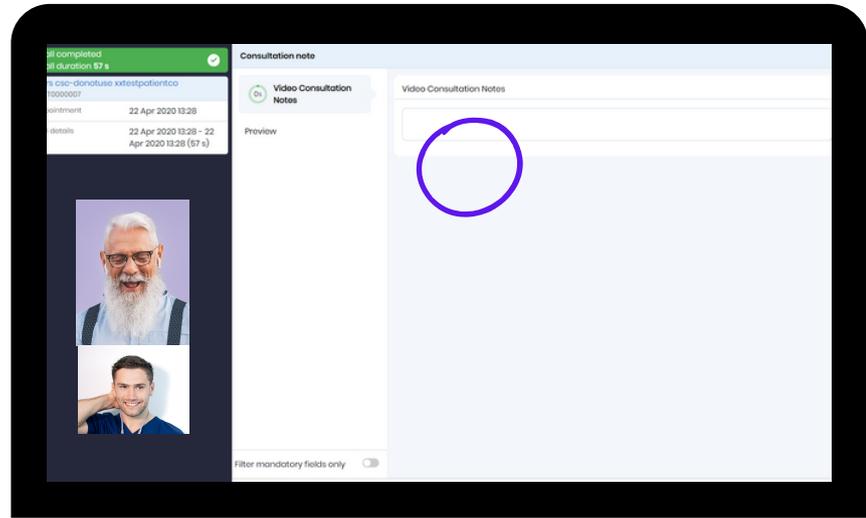


# Complete laptop consultation

How clinicians complete consultation on laptop

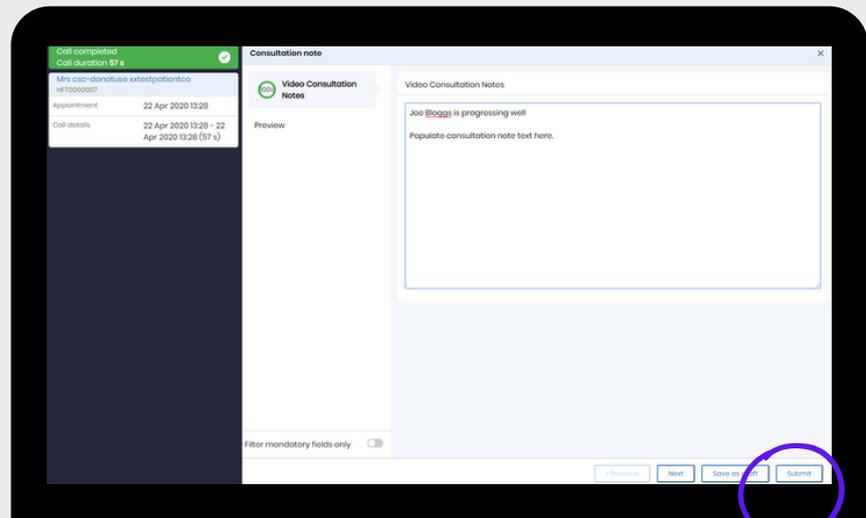
## Step 7

A predefined consultation note will be available for you to populate during the call (if you choose)



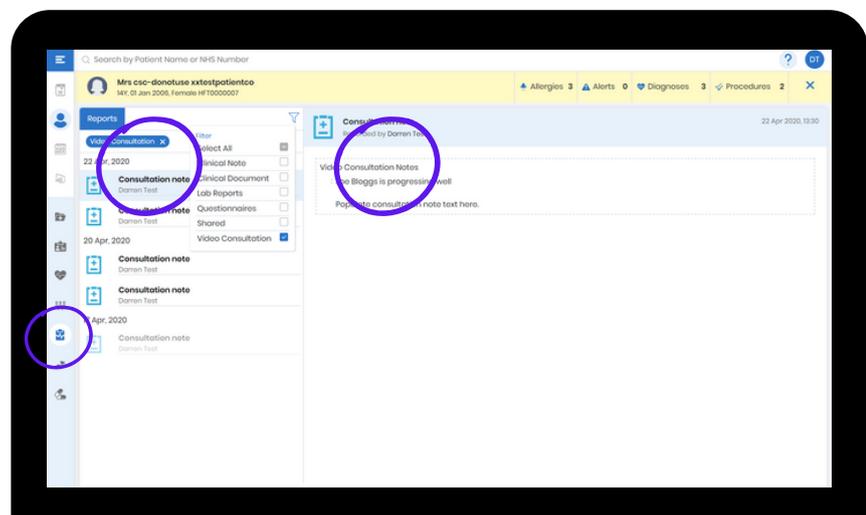
## Step 8

When you are ready to finish the call you just press the red icon to hang up. Then review and submit your consultation note.



## Step 9

When you submit the note the note is stored in the record. You can access the patient record, view and copy the consultation note.



For clinician



# Common questions

Can I use my own phone?

The Collaborate application works on all Android phones (version x or above)

Can I use my own laptop?

The Clinical Portal will work from any Chrome browser.

What network connection do I need?

To access the Clinical Portal you need to be connected to the HSCN (N3) network. The Collaborate application can work over internet.

What support is there from clinical systems?

....

Please get in touch with support on XX for any other queries

For clinician



# Common questions

Can I use my own phone?

Yes any iOS or Android smart phone will work

Please get in touch with support on XX for any other queries

For patient