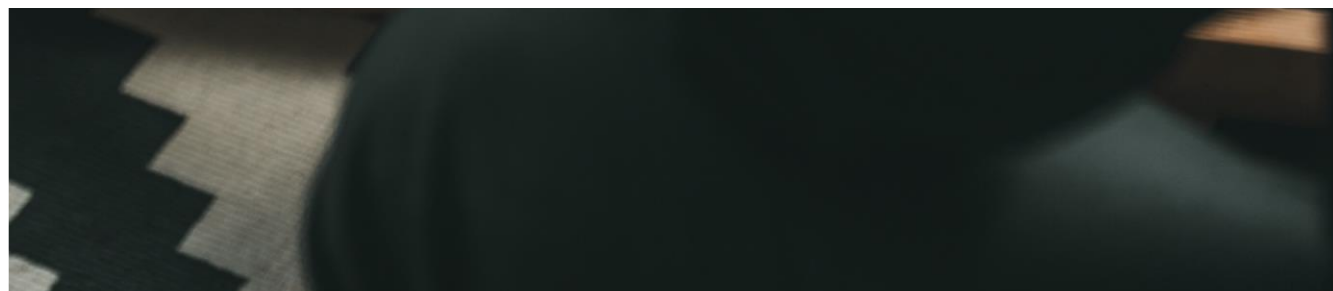




Visconn Clinic Administrator User Guide

October 2020 V1.45

VISCONN



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Introduction

Thank you for using Visconn Clinic.

The Visconn Team should have created your environment and shared the required details with you.

This guide is intended to be used by the Organisation's Super Administrator, or Platform Champion.

This person would have full access to the platform and may be responsible for administering and customising the Organisational Settings to fit the Organisation's preferences.

This guide is up to date with version 2.97 of Visconn Clinic.

To understand the Patient / External Participant experience, please visit <https://visconn.com/welcome-pack>

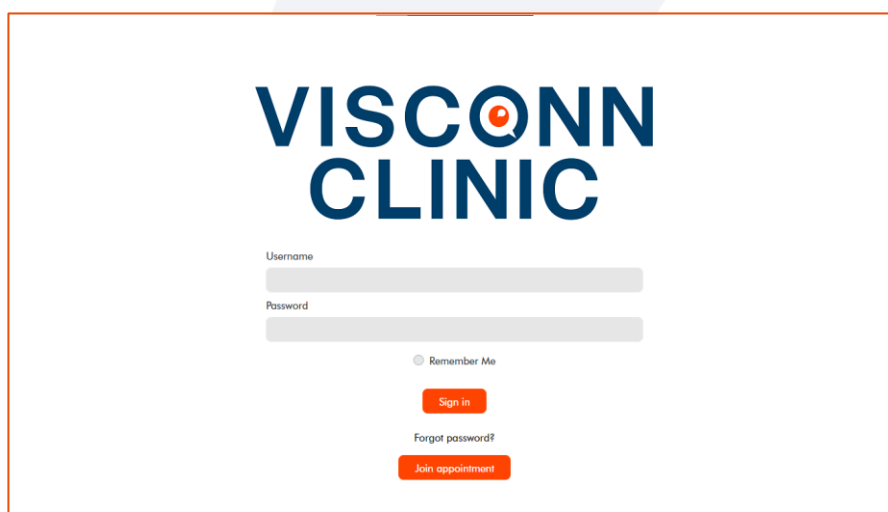
Logging in

The Visconn Clinic platform can be launched on various browsers.


Please use either Google Chrome, Mozilla Firefox, Microsoft Edge or Safari. To find out more about our supported browsers, please click [here](#).

When navigating to the platform, you have two options:

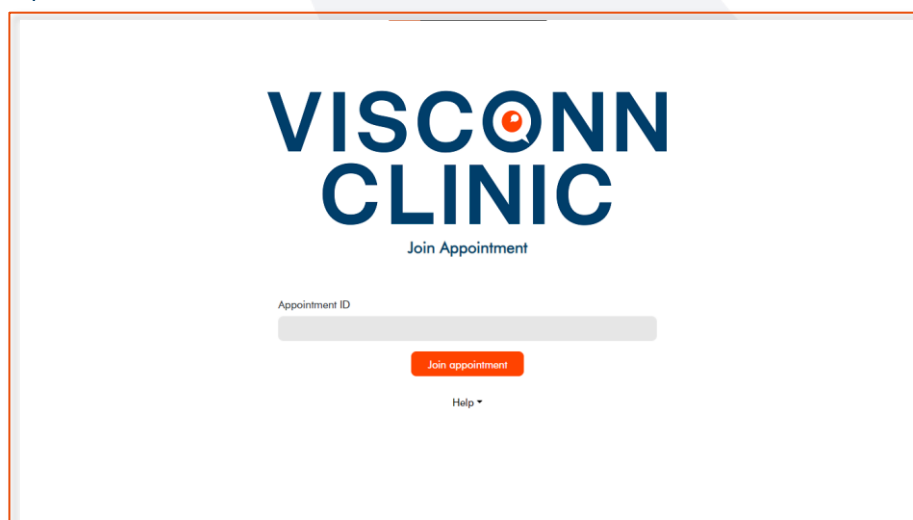
1. Type in **<https://visconn.clinic/clinician>** in your address/URL bar and press enter.



The screenshot shows the Visconn Clinic login interface for clinicians. At the top is the 'VISCONN CLINIC' logo. Below it are two input fields labeled 'Username' and 'Password'. There is a 'Remember Me' checkbox below the password field. Two orange buttons are present: 'Sign in' and 'Join appointment'. A link 'Forgot password?' is located between the two buttons.

Type your Email and Password and click  Sign in
This will take you to your straight to your Home Page.

2. Type in **<https://www.visconn.clinic>** in your address/URL bar and press enter. This will take you to the Patient Sign in. From here, you can click **"Help"** and select **"Not a patient"** from the dropdown. This will take you to the same page as option 1.



The screenshot shows the 'Join Appointment' page on the Visconn Clinic platform. It features the 'VISCONN CLINIC' logo at the top, followed by the text 'Join Appointment'. Below this is an input field labeled 'Appointment ID'. An orange 'Join appointment' button is positioned below the input field. At the bottom, there is a 'Help' link with a dropdown arrow.

Home

From this page you will be able to action each task you will need to carry out. By hovering over each button, you can find out the purpose of every action.

VISCONN

Mr Harry Rushin

Mr Harry Rushin

12/10/20 - 18/10/20

	Monday 12th	Tuesday 13th	Wednesday 14th	Thursday 15th	Friday 16th	Saturday 17th	Sunday 18th
13				13:25 - 13:40			
14		13:45 - 14:00					
15					15:15 - 15:30		
16							
17							

Click on any of the below to skip to their respective section of the guide:

[Calendar Views and Using your Calendar](#)



[Creating Appointments](#)



[Your Waiting Room](#)



[Your Account and Settings](#)



Mr Harry Rushin



Individual Calendars and Clinic Calendars

There are two types of Calendars that will be available to view, if you have access to them:

- **Individual Calendars**

These are Calendars that belong to Users, no matter whether they are Clinicians or Administrators.

They **only show** the bookings for that Resource, no matter which Clinic Room they are booked in for.

and

- **Clinic Calendars**

Clinic Calendars show the bookings made for a Clinic Room, no matter what resource has been booked.

Calendar Views and Using your Calendar

By default, your calendar will open on a Week View.

VISCONN

Mr Harry Rushin

Mr Harry Rushin

Mr Harry Rushin

12/10/20 - 18/10/20

Monday 12th

Tuesday 13th

Wednesday 14th

Thursday 15th

Friday 16th

Saturday 17th

Sunday 18th

13

14

13:45 - 14:00

13:25 - 13:40

15

15:15 - 15:30

16

17

At the top right of your page, you will find a Calendar view selector:

Mr Harry Rushin

Week View

17th


Sunday 18th

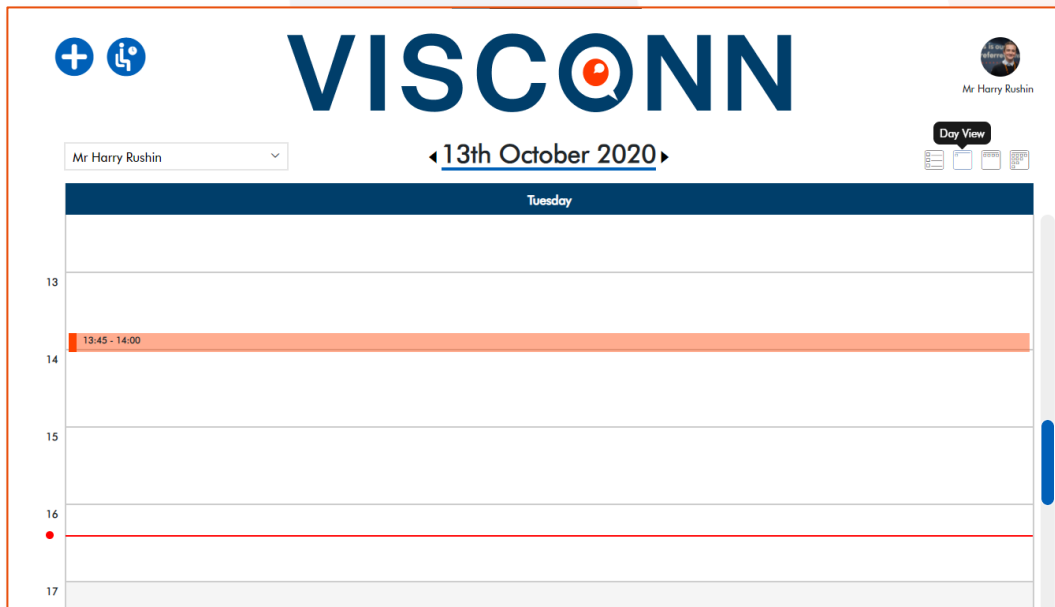
By pressing the first View Option , which is the **Agenda View**, you will be presented with the following:



The screenshot shows the VISCONN Agenda View interface. At the top, there is a header with the VISCONN logo, a user profile for Mr Harry Rushin, and a navigation bar with icons for a plus sign, a person, and a calendar. Below the header, there is a dropdown menu showing 'Mr Harry Rushin' and a date selector for 'October 2020'. The main content area displays a list of appointments for the month of October 2020. The appointments are organized by date: Tuesday 6th October 2020, Tuesday 13th October 2020, Thursday 15th October 2020, and Friday 16th October 2020. Each appointment is represented by a horizontal bar with a color-coded background (orange for 'New Patient' and pink for 'Validation and Monitoring'). The appointment times are listed next to the bars.

Date	Appointment	Time
Tuesday 6th October 2020	New Patient	15:30 - 15:45
Tuesday 13th October 2020	New Patient	13:45 - 14:00
Thursday 15th October 2020	New Patient	13:25 - 13:40
Friday 16th October 2020	Validation and Monitoring	15:15 - 15:30

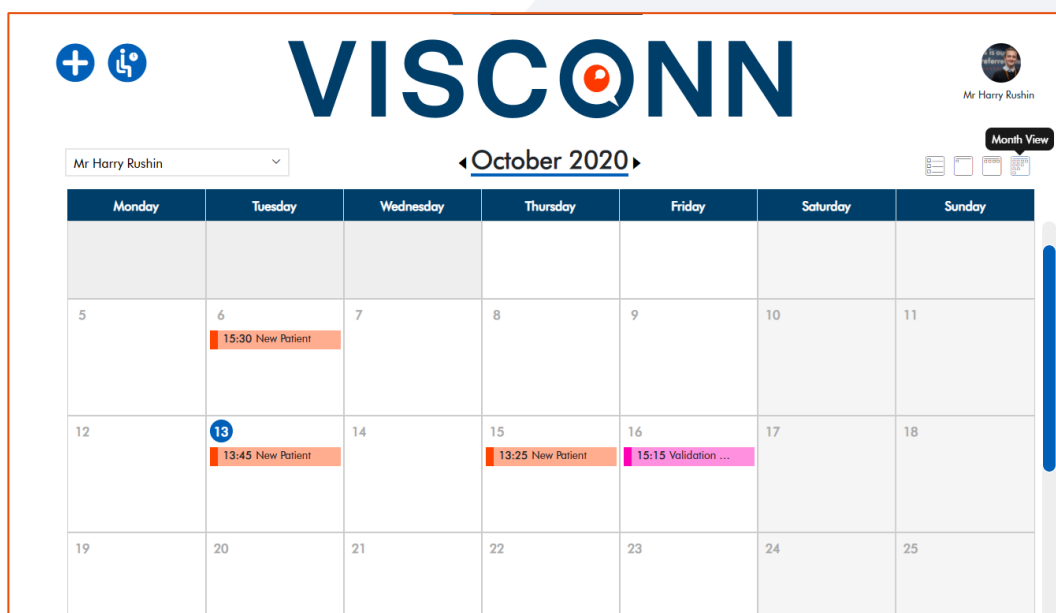
By pressing the second View Option , which is the **Day View**, you will be presented with the following:



The screenshot shows the VISCONN Day View interface. At the top, there is a header with the VISCONN logo, a user profile for Mr Harry Rushin, and a navigation bar with icons for a plus sign, a person, and a calendar. Below the header, there is a dropdown menu showing 'Mr Harry Rushin' and a date selector for '13th October 2020'. The main content area displays a detailed view of the day's appointments for Tuesday, 13th October 2020. The appointments are organized by time, with a vertical timeline on the left showing the hours from 13 to 17. The appointment 'New Patient' at 13:45 - 14:00 is highlighted with an orange bar. The interface also includes a vertical scrollbar on the right side.

Time	Appointment
13:45 - 14:00	New Patient

By pressing the fourth View Option  , which is the **Month View**, you will be presented with the following:



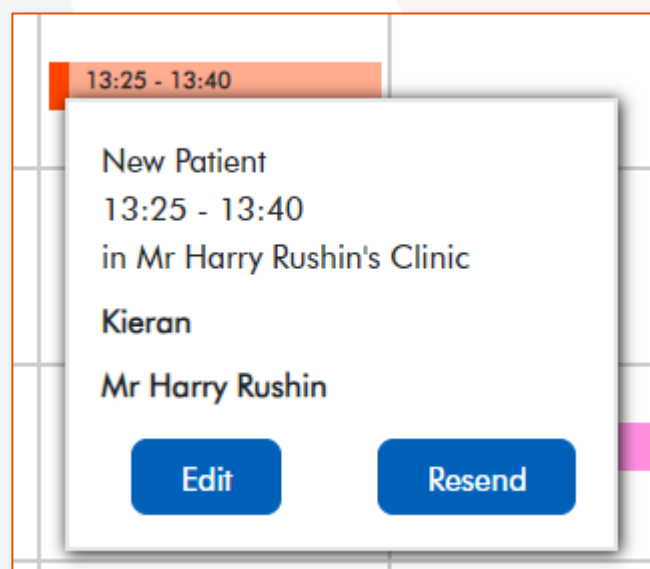
By clicking on any of the coloured appointment slots, you can find out more about them, including:

- The Clinician Resource booked for the Appointment
- Appointment Type
- Booked Clinic Room
- Patient Name
- Appointment Internal Description

You can edit the appointment details and participants.


You can also resend the appointment details to all of the participants with the same contact information.

Within the Edit page, you are also given the option to reschedule the invitation.




Following the consultation, all external/patient information will be anonymised according to your Organisation's settings. This is set to 30 days by default but can be changed in the organisational settings.


Participants




Anonymised 14/10/2020
External



Mr Harry Rushin
Clinician



Anonymised 14/10/2020




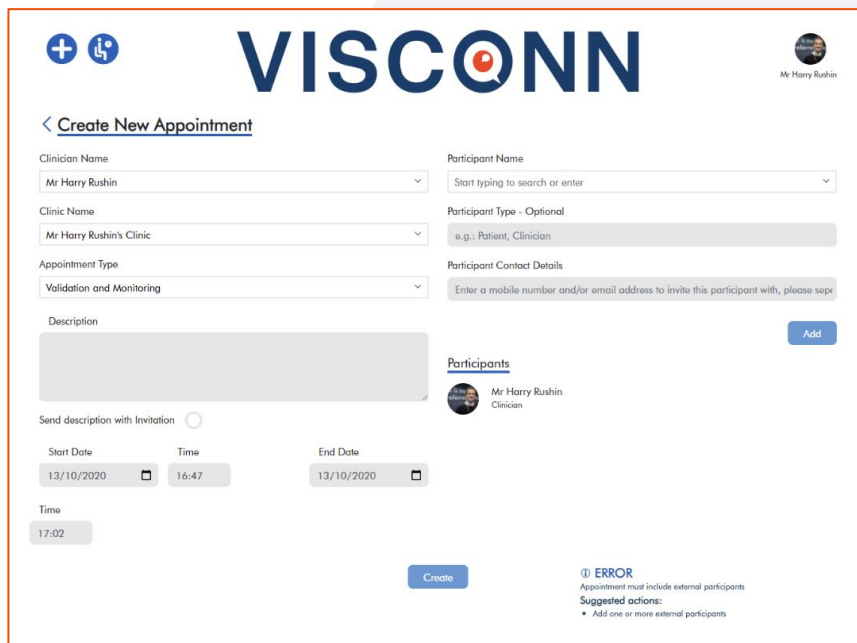
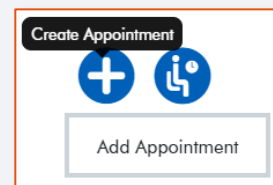
Anonymised 14/10/2020

New Patient
13:45 - 14:00
in Mr Harry Rushin's Clinic
Anonymised 14/10/2020
Mr Harry Rushin
New Patient for Harry Rushin's
Clinic

View

Create appointment

To create a new appointment, click on the  icon on the top left corner of your screen and select **Add appointment**.



To create an appointment from scratch, please enter the following information.

- **Clinician Name:** Select the clinician's name from the drop-down menu.
 - This will be populated as the last Clinician you selected.
- **Clinic Name:** Select the Clinic room that you wish to book the Clinician resource for.
 - You will only be permitted to book Clinics that the Clinician has access to.

If you enter the Clinician Name first, the Clinic dropdown will be filtered to show the Clinics that Clinician has access to.

If you enter the Clinic Name first, the Clinician dropdown will be filtered to show the Clinicians that can be booked for that Clinic.

- **Appointment Type:** Select the appropriate appointment type from the drop down list.

- **Appointment Date and Time:** Select the Start Date, End Date and Times.
 - The end date will default to the start date and the end time will default to the start time plus the default consultation length.
- **Description:** Enter a brief description of the consultations contents, hyperlinks may be included if necessary. This can be sent to the Patient if selected below the description box, otherwise this will remain as an internal note.
- **Internal And External Participants:** Enter the name of the participant that you would like to attend the Video Consultation.
 - This will autofill existing users for your organisation and they must be selected to invite them.
 - External participants will not be autofilled, typing their name would suffice.
- **Participant Type:** Although this field is optional, it provides additional clarity pre, peri and post-consultation as it can help distinguish between staff/professionals and patients.
- **External Participant Contact Details:** Enter the email address or mobile number (Separated by a comma) of external participant that you would like to join the consultation.

To finish creating the appointment, click

A blue rectangular button with the word "Create" in white text.

After clicking the “**Create**” button, the invitations will be sent to all participants of the appointment and it will be displayed in the relevant Clinician's calendar.

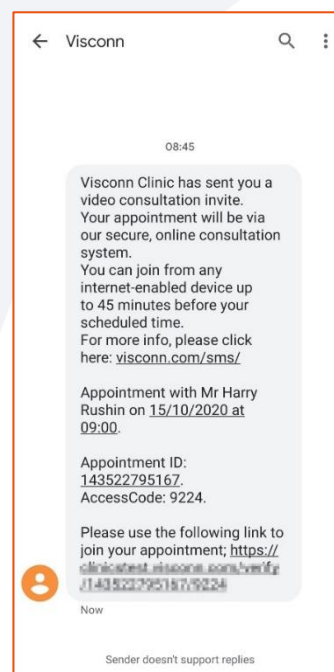
If the appointment is created more than 24 hours in advance, a 24 hour reminder will be sent to the Patient's contact details.

Dependent on Organisational Settings, a 1 hour reminder may be sent also for appointments sent more than an 1 hour in advance.

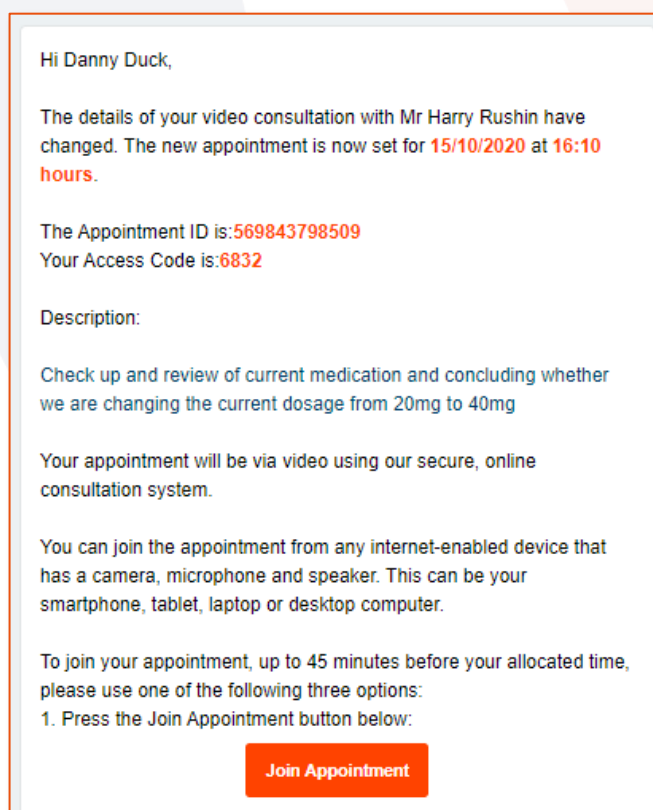
Appointment Invite Examples

There are two types of invitations that your Patients and Externals can receive:

SMS – Text Message



Email



Booking Consultation Rooms

If a Consultation requires a Physical Virtual Consultation Room, such as a Visconn Hub / Remote Visconn Clinic Unit, then the below instructions will guide you on how to book a Consultation Room appointment.

When creating a new appointment, select the Clinician and Clinic name as normal then in appointment type select Consultation Room. Below date and time, a button should appear as "Choose Room" and click on it.

[<](#) **Create New Appointment**

Clinician Name

Mr Harry Rushin

Clinic Name

Mr Harry Rushin's Clinic

Appointment Type

Consultation Room

Description

Send description with Invitation

☐

Start Date

14/10/2020

Time

09:00

End Date

14/10/2020

Time

09:15

Consultation Room

Choose Room

A pop up should appear, click "select" on your chosen Consultation Room

Available Consultation Rooms ✕

Consultation Date and Time:

Start

14/10/2020

09:00

End

14/10/2020

09:15

Search

Room ID	Room Type	Location	Address	Postcode	
Xuper Morse	Visconn Hub	Xuper Head Office	Mallard House, Stanier Way, Derby	DE21 6BF	Select

Waiting Room

For every Clinic created there is a Virtual Waiting Room.

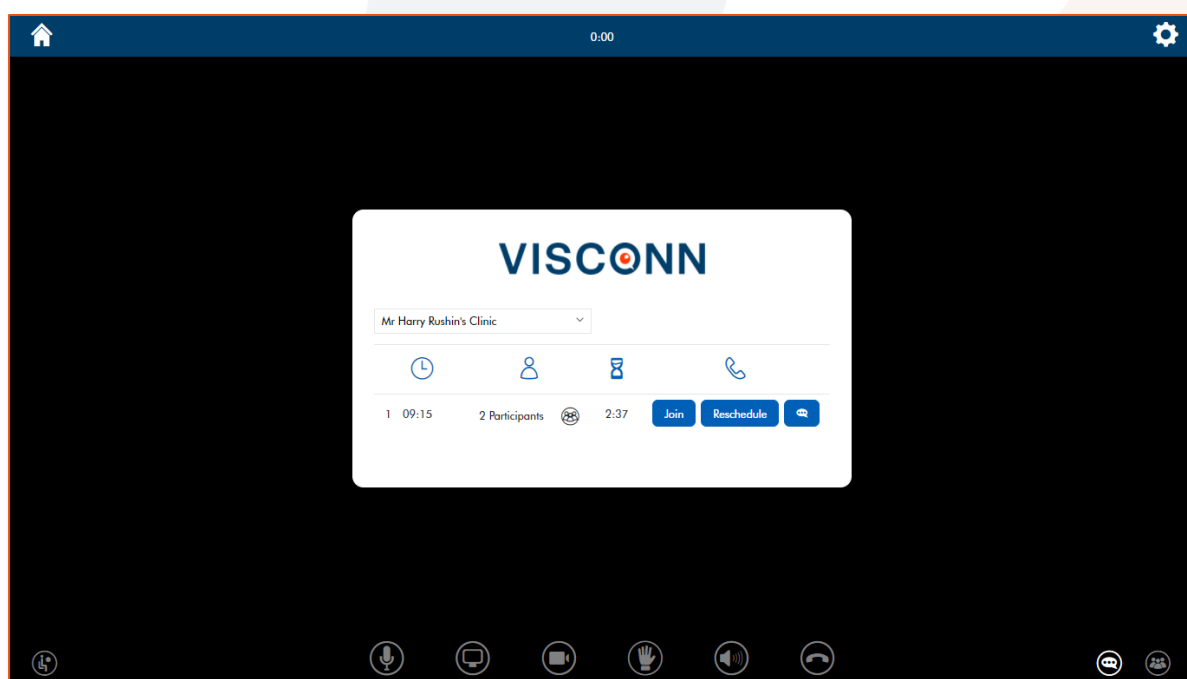


When a patient has joined and gone through the necessary checks and testing, they will appear in the scheduled Clinician's waiting room.

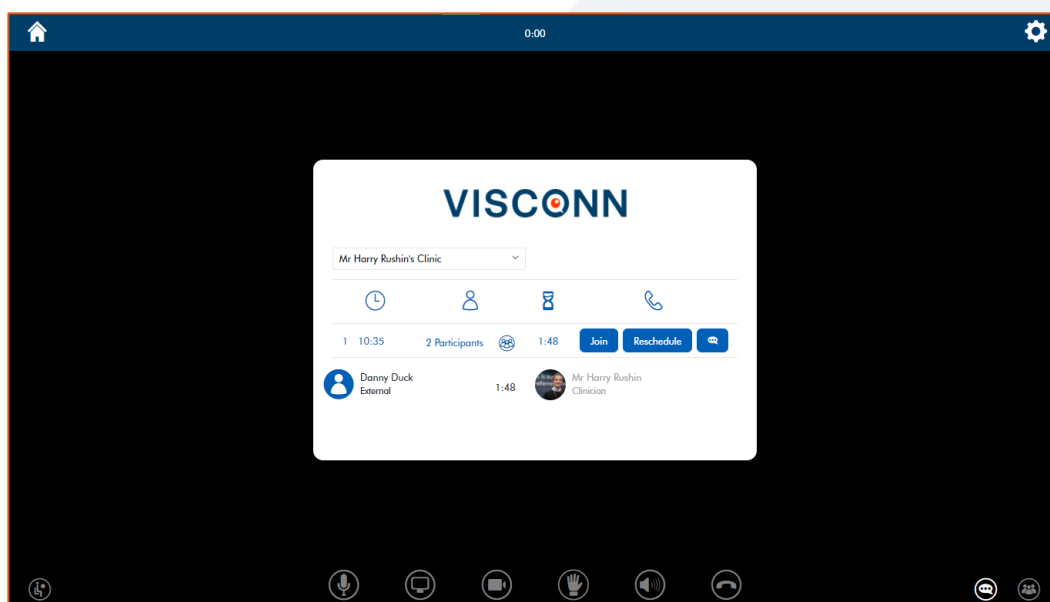
Each separate appointment / patient will queue up here.

This Waiting Room is where patients who are awaiting a consultation will arrive in sequence of their scheduled appointment time.

Click  to access the waiting room.



To view participants click  and the participants of the call will be visible.



Reschedule

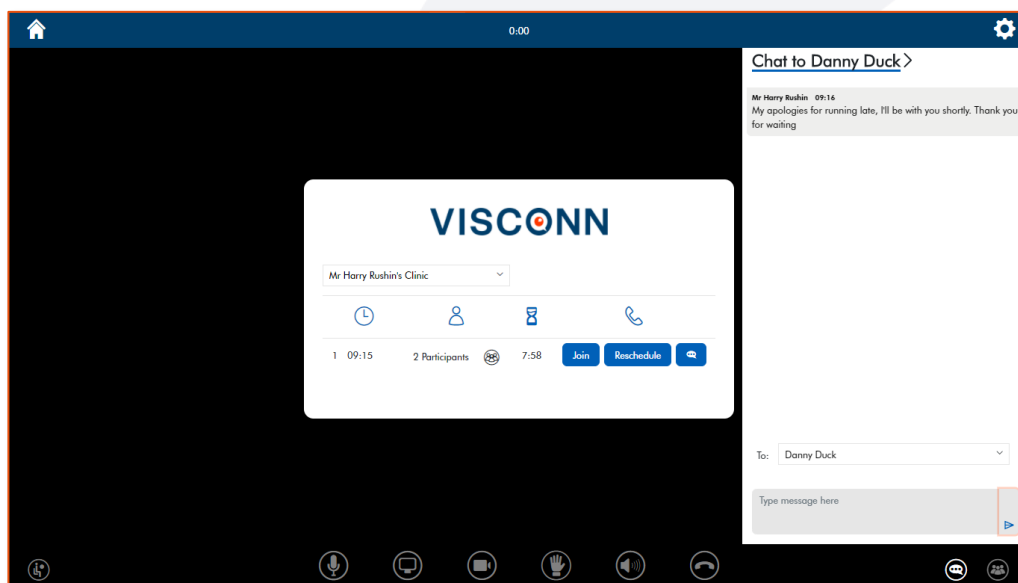
For any reason, the Clinician or another Organisation can reschedule the patient waiting in the queue for another time. This will send a configurable message to the Patient waiting on their device, aswell as an updated Rescheduled Invitation to their original Contact Details used for invitation.

Messaging from the waiting room

The Clinician can send a message to a patient in the waiting room.



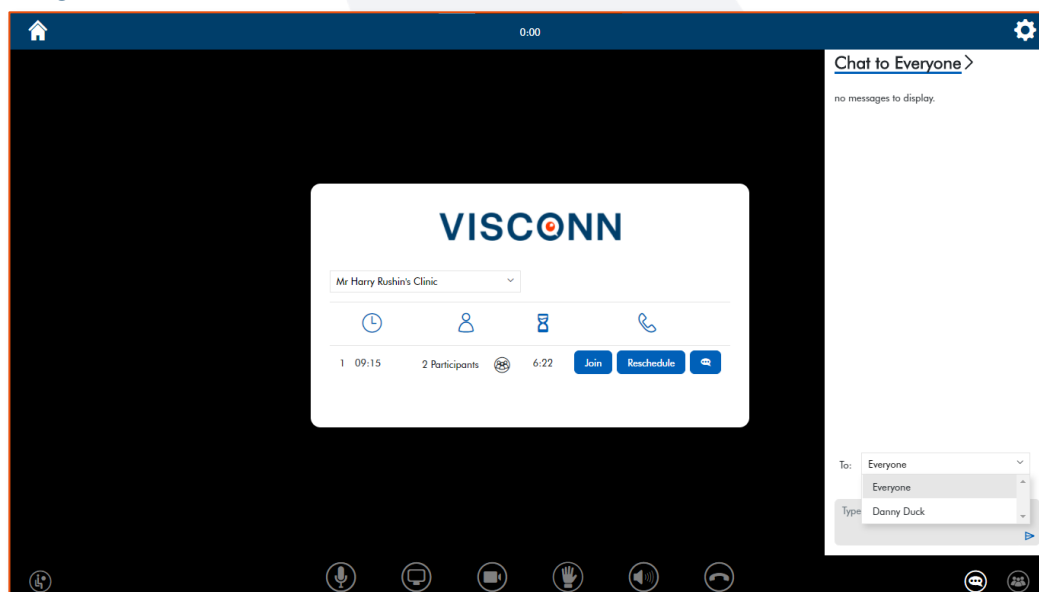
This may be to advise them of any unexpected delays or anything they may need to present during the consultation.



This is a one way message so the Patient does not have the option to the reply to the message, until after the consultation has started.

The Clinician may also choose whether they want to message an individual patient or everyone in a group consultation.

This is done by simply clicking on the dropdown box next to "To" and selecting the chosen contact.

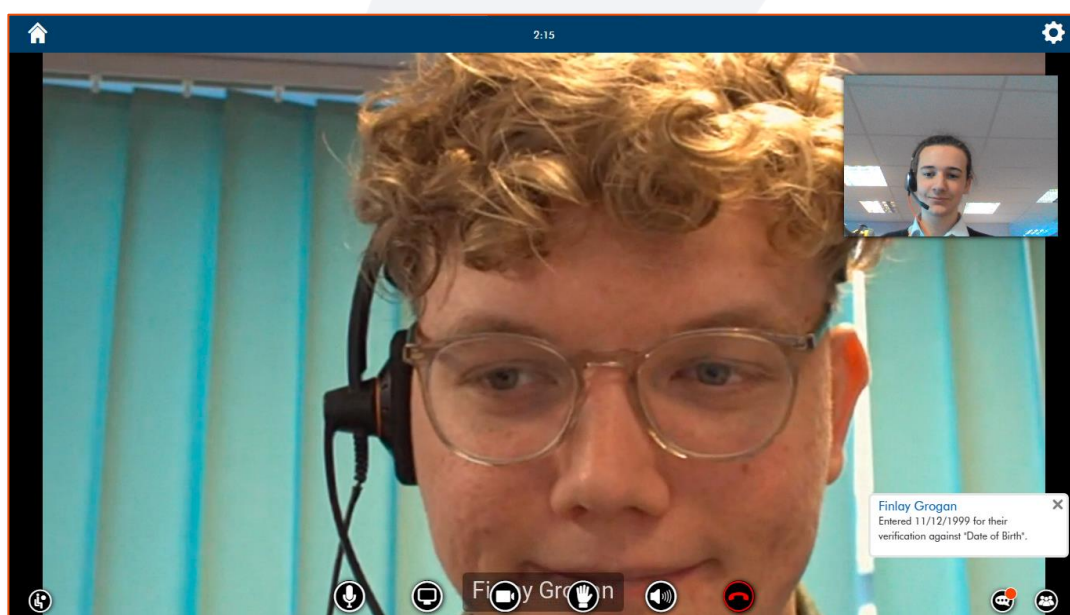


Joining the Consultation

Before joining the consultation, we recommend that you test your device to ensure it is ready for Video Consultations, click here to find out [how](#).

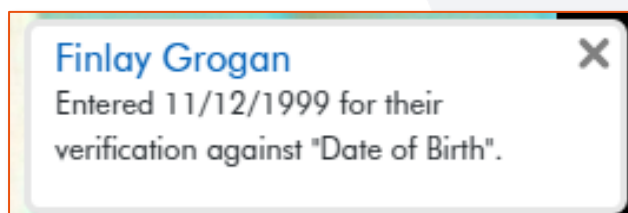
Join

Clicking the “**Join**” button brings the invited participants and Clinician into a Video Consultation together.



Verification

As you can see above, a message will come through to you when the Consultation begins.



This message will contain the Patient's response to a piece of Verification Data requested of them when entering the Waiting Room.

It is your responsibility as a Clinician to check this data against your Records to confirm this person is who is intended to be seen.

You may have to verbally question their Full Name or Date of Birth.

For further recommendations, see our Patient ID Verification Best Practice documents.

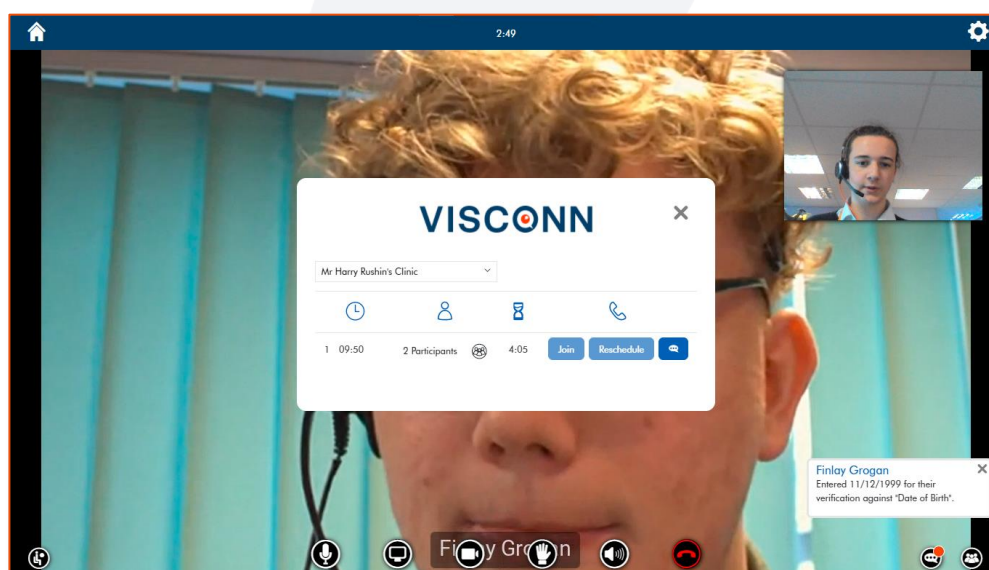
Viewing the Waiting Room and Messaging whilst in Call

When in-call, you will find the message button at the bottom right of the screen next to the participants button.



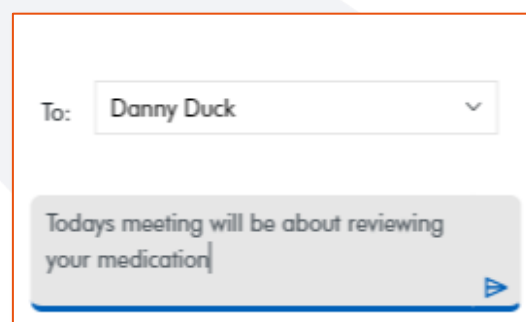
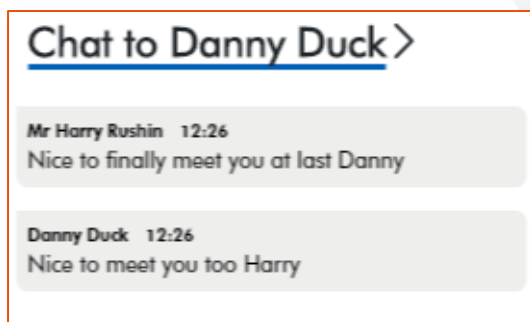
The waiting room button is located at the bottom left of the screen

By clicking the “**Waiting Room**” button, the Waiting Room popup will appear over the Video Call, like so:



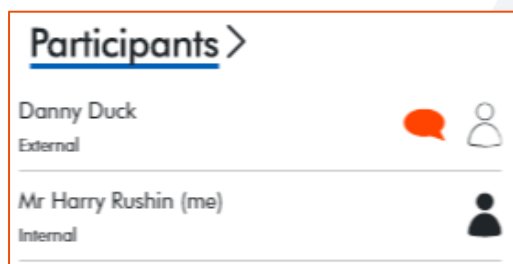
When this appears, you can see patients in the waiting room. At this point you can message them either to update them on any current waiting times or any extra necessary information.

You can open the chat panel by clicking on the chat button in the bottom right corner next to the participant button, from there you can choose the participant you wish to message and message them.



Participant Panel, Options and Controls

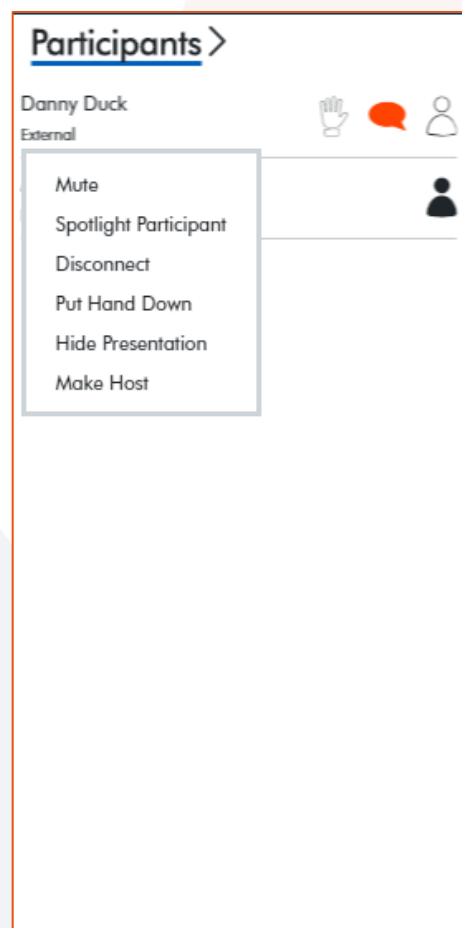
All participants can view the participants that are attending the consultation by clicking on the participants button



As the host of the meeting you will have access to settings that control the participants properties.

These include:

- **Mute** – Mutes selected participant
- **Spotlight Participant** – Maximises selected participant to cover most of the screen
- **Disconnect** – Disconnects selected participant
- **Put Hand Down** – Puts selected participants hand down (only if their hand is up)
- **Hide Presentation** – Hides selected participants presentation (only if being displayed)
- **Make Host** – Makes selected participant host to the consultation



Return to your Home page (calendar)

Device Settings

Waiting Room Popup

View participants

Active Conversations

Disable/enable the microphone

Start/stop share

Disable/enable the camera/video

Raise/lower virtual hand

Disable/enable the speaker

End the consultation

Settings

Click on the **Profile photo** to create and/or manage your profile **Settings**, Get **Help** or **Sign Out** of the portal.



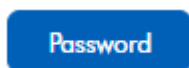
You will be brought to your profile and account settings



You will be taken to Settings:
From here you have 4 tabs:
(click on any of the images or titles to skip to that option)



[Profile and Account](#) – Set your profile details



[Password](#) – Reset your password



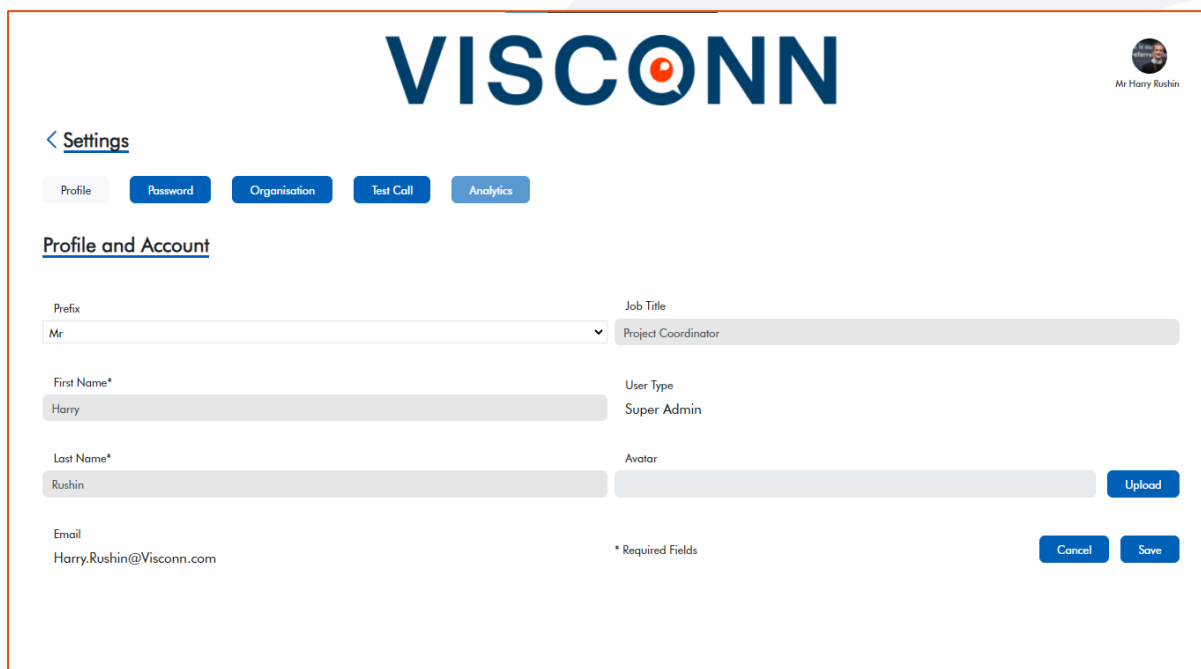
[Organisation](#) – Customise and Administer your Organisation



[Test Call](#) – Test your call to make sure you are ready for your consultation.

Profile and Account

Click on **Settings** to manage your Profile Settings, this will take you to the **Profile and Account** screen shown below:



The screenshot shows the VISCONN 'Profile and Account' settings page. At the top, there's a navigation bar with 'Settings' and tabs for 'Profile', 'Password', 'Organisation', 'Test Call', and 'Analytics'. The 'Profile' tab is active. Below the tabs, the 'Profile and Account' section contains several input fields: 'Prefix' (dropdown menu with 'Mr' selected), 'Job Title' (text input with 'Project Coordinator'), 'First Name*' (text input with 'Harry'), 'User Type' (text input with 'Super Admin'), 'Last Name*' (text input with 'Rushin'), and 'Avatar' (text input with an 'Upload' button). The 'Email' field shows 'Harry.Rushin@Visconn.com'. At the bottom right, there are 'Cancel' and 'Save' buttons. A note '* Required Fields' is also present.

You may amend your personal details as follows:

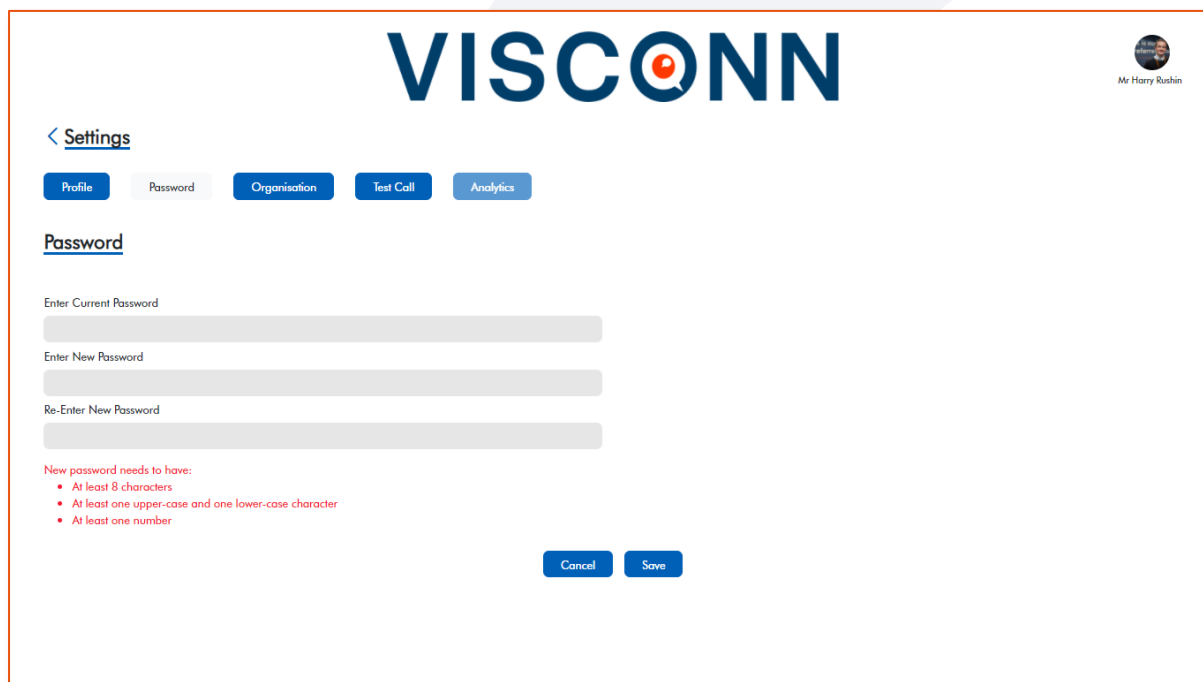
- Prefix
- First name
- Last name
- Job Title
- Avatar - Browse and select an Image from your computer

Then click  to save these changes.

Password

Click on Settings and select the **Password** tab to change your password.

Input your existing password, your new password and confirm your new password again. Click "**Save**" to change your password.



The screenshot shows the VISCONN user interface. At the top, the VISCONN logo is on the left, and a user profile icon with the name 'Mr Henry Rushin' is on the right. Below the logo is a navigation bar with a back arrow and the word 'Settings'. Underneath are five tabs: 'Profile', 'Password', 'Organisation', 'Test Call', and 'Analytics'. The 'Password' tab is selected. The main content area is titled 'Password' and contains three input fields: 'Enter Current Password', 'Enter New Password', and 'Re-Enter New Password'. Below these fields, a red message states 'New password needs to have:' followed by three bullet points: 'At least 8 characters', 'At least one upper-case and one lower-case character', and 'At least one number'. At the bottom right of the form are 'Cancel' and 'Save' buttons.

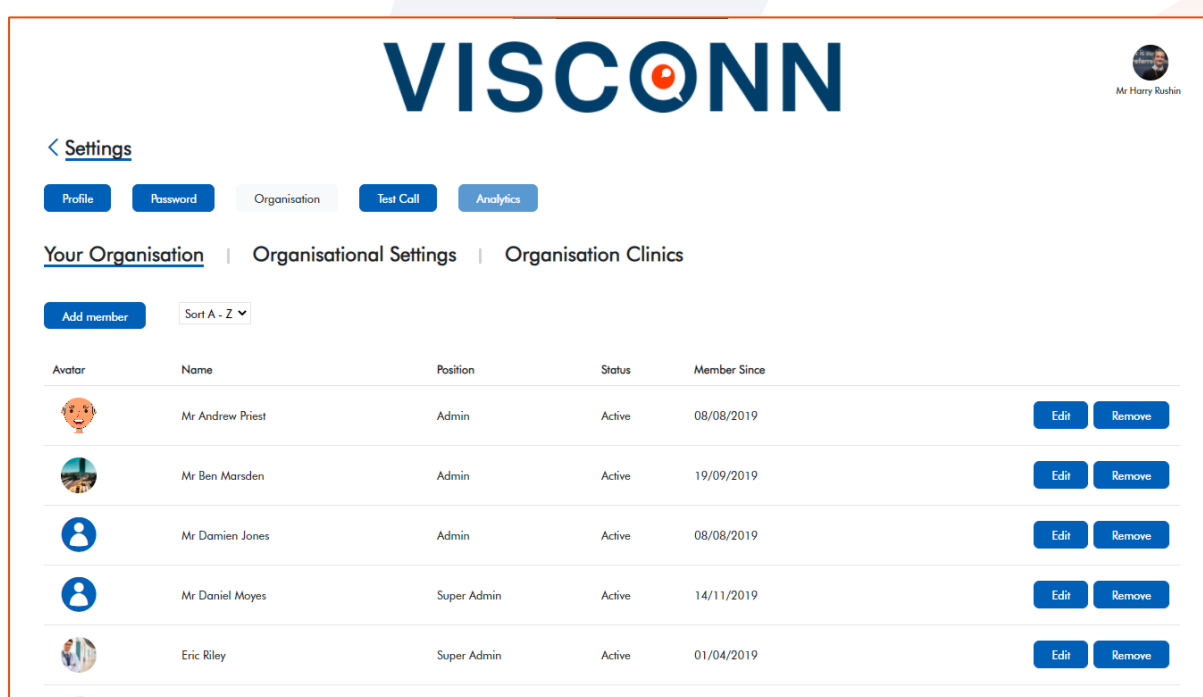
Organisation

This tab provides you (and anyone else with access) the ability to administer and customise your Organisation settings. There are three sections:






- My Organisation
- Organisational Settings
- Organisation Clinics

Your Organisation

Administer your Organisation's members.



The screenshot displays the 'Your Organisation' settings page in the VISCONN application. The page header includes the VISCONN logo and a user profile for 'Mr Harry Rushin'. Below the header, there are tabs for 'Settings', 'Profile', 'Password', 'Organisation' (selected), 'Test Call', and 'Analytics'. Under the 'Settings' tab, there are sub-sections: 'Your Organisation' (selected), 'Organisational Settings', and 'Organisation Clinics'. The 'Your Organisation' section features an 'Add member' button and a 'Sort A - Z' dropdown. A table lists the organization's members with the following data:

Avatar	Name	Position	Status	Member Since	
	Mr Andrew Priest	Admin	Active	08/08/2019	Edit Remove
	Mr Ben Marsden	Admin	Active	19/09/2019	Edit Remove
	Mr Damien Jones	Admin	Active	08/08/2019	Edit Remove
	Mr Daniel Moyes	Super Admin	Active	14/11/2019	Edit Remove
	Eric Riley	Super Admin	Active	01/04/2019	Edit Remove

Add Member

VISCONN

< Settings

Profile Password

Your Organisation

Add member Sort A-Z

Avatar Name

Mr Andre

Mr Ben

Mr Dam

Mr Daniel Moyes

Eric Riley

Super Admin

Super Admin

Active

14/11/2019

01/04/2019

Edit Remove

Edit Remove

Edit Remove

Edit Remove

Edit Remove

Edit Remove

Add Member

Prefix

Mr

Job Title

First Name*

Last Name*

Email*

User Type*

Super Admin

Avatar

Upload

Clinic enabled?

* Required Fields

Save Cancel

To add a member to your organisation, click on the **"Add Member"** button and you will be presented with this popup.

Once you click **"Save"**, a link will be sent to the given email and the user will have 48 hours to set their Password.


If the link expires, they will be provided with information on requesting a new invite on their initial Welcome email.

The **"Clinic enabled?"** switch is the method of enabling the User's Personal Clinic Room where they could host their appointments.

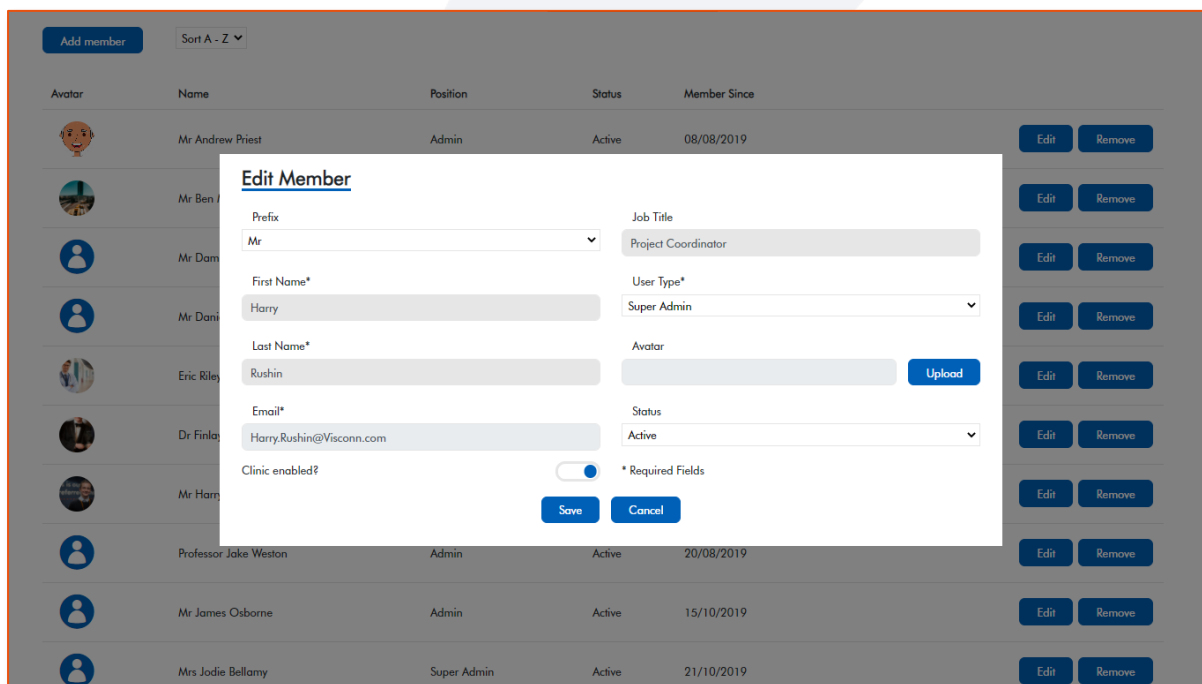
It will be named by default as "Prefix FirstName LastName's Clinic" (eg: Miss Alice Smith's Clinic), but this can be changed.

Edit Member

For an existing member of an organisation, you can click on “**Edit**” to change their details.

	Mr Harry Rushin	Super Admin	Active	06/10/2020	Edit	Remove
---	-----------------	-------------	--------	------------	----------------------	------------------------

You can change everything except their email.



The screenshot shows a user management interface with a table of members. An 'Edit Member' modal is open, displaying the following fields:

- Prefix: Mr (dropdown)
- Job Title: Project Coordinator (text input)
- First Name*: Harry (text input)
- User Type*: Super Admin (dropdown)
- Last Name*: Rushin (text input)
- Avatar: (text input with an 'Upload' button)
- Email*: Harry.Rushin@Visconn.com (text input)
- Status: Active (dropdown)
- Clinic enabled?: ☒ (toggle)

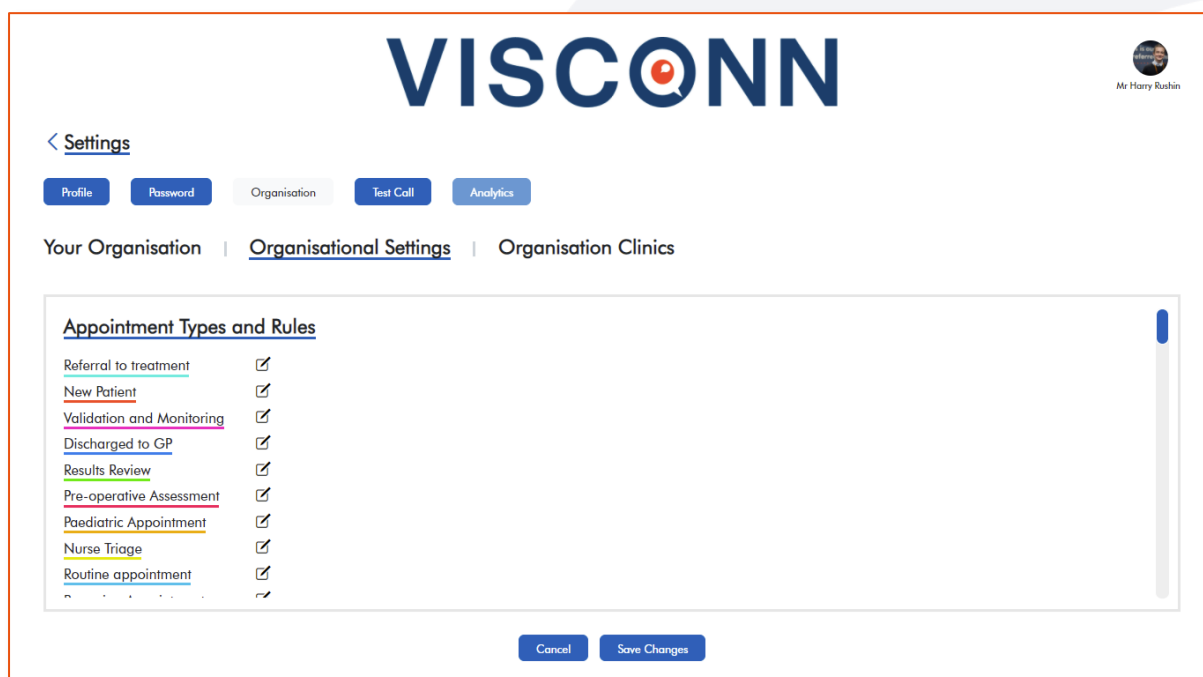
Buttons at the bottom of the modal: Save, Cancel. A note indicates '* Required Fields'.

Note that:

- By changing the **User Type**, you may change what permissions that User has.
- By changing the **Status** from Active to Inactive, this will put their account on hold, and they will not be able to login or be booked for any appointments.
- By disabling the **Clinic**, the Users with access to that Clinic will no longer be able to see or take appointments already booked in that Clinic until it is re-enabled.
Future appointments will not be able to be booked in that Clinic until it is re-enabled.

Organisational Settings

Customise Organisation preferences for usage of the Visconn Clinic platform.



VISCONN

Mr Harry Rushin

< Settings

Profile Password Organisation Test Call Analytics

Your Organisation | Organisational Settings | Organisation Clinics

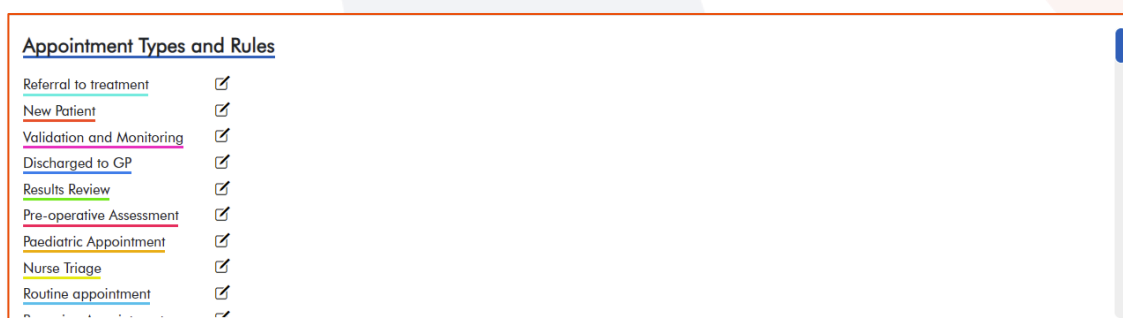
Appointment Types and Rules

Referral to treatment	<input checked="" type="checkbox"/>
New Patient	<input checked="" type="checkbox"/>
Validation and Monitoring	<input checked="" type="checkbox"/>
Discharged to GP	<input checked="" type="checkbox"/>
Results Review	<input checked="" type="checkbox"/>
Pre-operative Assessment	<input checked="" type="checkbox"/>
Paediatric Appointment	<input checked="" type="checkbox"/>
Nurse Triage	<input checked="" type="checkbox"/>
Routine appointment	<input checked="" type="checkbox"/>

Cancel Save Changes

Appointment Types and Rules


This section allows you to define the various appointment types you wish to operate, and what specific rules applies to each Appointment Type.



Appointment Types and Rules

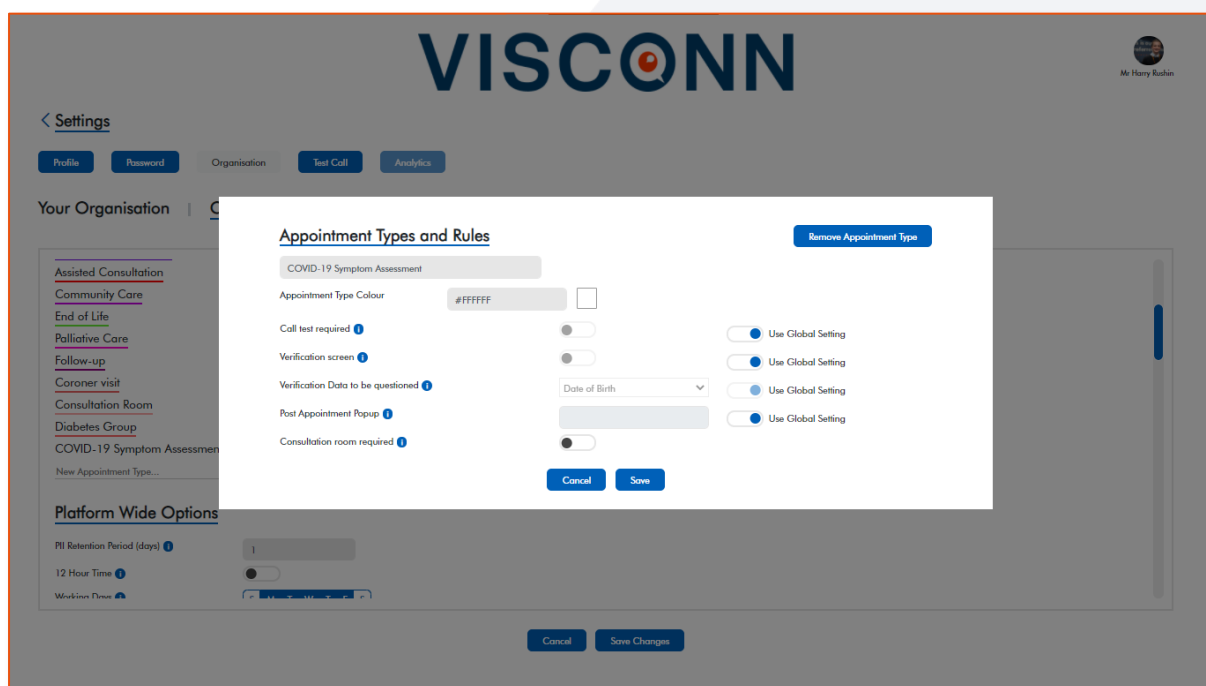
Referral to treatment	<input checked="" type="checkbox"/>
New Patient	<input checked="" type="checkbox"/>
Validation and Monitoring	<input checked="" type="checkbox"/>
Discharged to GP	<input checked="" type="checkbox"/>
Results Review	<input checked="" type="checkbox"/>
Pre-operative Assessment	<input checked="" type="checkbox"/>
Paediatric Appointment	<input checked="" type="checkbox"/>
Nurse Triage	<input checked="" type="checkbox"/>
Routine appointment	<input checked="" type="checkbox"/>

To create a new Appointment Type, type the Appointment Type name into the following field at the bottom of the list and press enter (or click out of the Field):



Asthma review	<input checked="" type="checkbox"/>
Mental Health Discussion	<input checked="" type="checkbox"/>
Prescription Review	<input checked="" type="checkbox"/>
Inmate health review	<input checked="" type="checkbox"/>
Visconn Hub Patient	<input checked="" type="checkbox"/>
COVID Symptom Review	<input checked="" type="checkbox"/>

To edit an existing appointment type, press: 
Then an Appointment Type Rule Popup will appear.









By default, the Appointment Type Rules follow the Global Settings and the Appointment Type Colour is white.

To change the colour of the Appointment Type, click the colour box:

Or enter a hex-code for a colour into the #FFFFFF field.



For each of the following settings, enable or disable the “Use Global Setting” switch and select each setting as required.

Call test required 	<input type="checkbox"/>	<input checked="" type="checkbox"/> Use Global Setting
Verification screen 	<input type="checkbox"/>	<input checked="" type="checkbox"/> Use Global Setting
Verification Data to be questioned 	Date of Birth 	<input type="checkbox"/> Use Global Setting
Post Appointment Popup 	<input type="checkbox"/>	<input checked="" type="checkbox"/> Use Global Setting
Consultation room required 	<input type="checkbox"/>	

- **Call Test required:** Select if the patient must complete testing prior to their appointment (this checks the connectivity, microphone, speakers)

and camera on their chosen device). (HEAVILY RECOMMENDED to leave enabled.)

- **Minimum call connection quality:** Select the minimum bandwidth for the patient to be able to successfully pass the internet connection speed test – we recommend 1.6 Mbps for Full HD calls.
- **Verification screen:** Select if the patient is required to enter any verification data before entering an appointment.
- **Verification data to be questioned:** Select what data you wish the patient to enter to verify their identity. The options are either Full Name or Date of Birth as standard.
- **Post appointment popup:** Provide a link that will open as a new tab for the Patient and Externals when an appointment has finished. (For example: A Survey page; your Clinic Website; NHS 111)
- **Consultation room required:** This switch is only required if you are working with Xuper to manage a Consultation Room where your Patients will attend Virtual Consultations using Video Room Systems or a Visconn Hub.
 - a. This switch manages whether you will have to select a Physical room for the booking of that Appointment Type. Doing this also changes the invitation that the Patient and other External Participants receive.

Platform Wide Options

These options affect the entire Platform experience.

Platform Wide Options

PII Retention Period (days)

12 Hour Time ☐

Working Days

Working day start & end time

Pre Start Appointment Reminders ☒

SMS Display Name

- **PII Retention Period (days):** The number of days after the scheduled start time of an Appointment that the Patient's Personally Identifiable Information is anonymised on the system.
 - a. By leaving this at 0, the data is not anonymised.
- **12-hour time:** Select 12 hour or 24-hour clock e.g. 2 pm or 14:00 hours.
- **Working Days:** Define a visible working day range on your Calendar for the entire organisation.
 - a. Note that this does not affect when appointments can be booked.
- **Working day start and end time:** Define the Calendar start time.
 - a. Note that this does not affect when appointments can be booked.
- **Patient Identifier:** Select between Patient ID and Patient Name as the Patient Identifier.
 - a. This will affect the fields when creating appointments.
- **Pre-Start Appointment Reminders:** This switch enables 1-hour reminders for Appointments booked more than an hour in advance.
- **SMS Display Name:** This field allows you to enter a Sender Name for the SMS Text Invites that the platform sends for Appointment Invites and

Reminders. There is a limit of 11 Characters (including spaces).
When left blank, the Invites come from "Visconn".

- a. Note that the Email Sender Name is your Organisation's Name, which is defined when onboarded by Xuper.

Patient Side Options

Patient Side Options

- Early joining cutoff (minutes) 45
- Late joining cutoff (minutes) 20
- Verification screen ☒
- Verification data to be questioned Date of Birth ▼
- Call test required ☒
- Minimum call connection quality 0.5 Mbps ▼
- Show queue position ☒
- Reschedule text Please expect future contact for reschedule
- Call Rating text How likely are you to choose a video consultation as an option again?
- Post Appointment Popup <https://forms.office.com/Pages/ResponsePage.aspx?id=-GTT00QQ6keEWyplqUUiEp/>
- Requirements Page Custom Message By proceeding past this page you consent to participating in a Video Consultation.

- **Early joining cutoff:** Define the number of minutes before the scheduled appointment start time that the patient may enter the waiting room.
 - a. the patient will be told to come back at early joining cut off time.
- **Late joining cutoff:** Define the number of minutes after the scheduled appointment start time that the patient may enter the waiting room.
 - a. After this cutoff, the patient will be told that they have joined too late.
- **Verification screen:** Select if the patient is required to enter any verification data before entering an appointment.
- **Verification data to be questioned:** Select what data you wish the patient to enter to verify their identity. The options are either Full Name or Date of Birth as standard.
- **Call Test required:** Select if the patient must complete testing prior to their appointment (this checks the connectivity, microphone, speakers and camera on their chosen device). (HEAVILY RECOMMENDED to leave enabled.)
- **Minimum call connection quality:** Select the minimum bandwidth for the patient to be able to successfully pass the internet connection speed test – we recommend 1.6 Mbps for Full HD call.

- **Show queue position:** Select if you wish the patient to be advised of their position in the queue within the waiting room.
- **Reschedule text:** Enter the notification message that you wish to send the patient when their appointment has been rescheduled.
- **Call Rating Text:** Feedback Question to be asked of the Patient after their call, for them to rate the call. This can be disabled by leaving the field blank.
- **Post appointment popup:** Provide a link that will open as a new tab for the Patient and Externals when an appointment has finished.
(For example: A Survey page; your Clinic Website; NHS 111)
- **Requirement Custom Message:** A custom message that appears as "Additional Information" on the Requirements Page. The Patient must agree to this before proceeding into the Virtual Waiting Room. This field has a limit of 750 characters. If left empty, no additional information will be displayed of the Requirements Page.

VISCONN CLINIC

Are you ready for your consultation?

For the best experience with your Video Consultation:

You will require:
A good connection to the internet
Connect to your best available network, whether that is WiFi or 4G.

We recommend:
A private, quiet and well lit room
Where you believe you will be undisturbed for the length of your consultation.

Your device will have:
A camera, speakers and a microphone
These are usually already built into laptops or mobile devices.

Additional information:
Please expect at least 5 minute waiting time.

☐ I Understand The Requirements And
☐ I Agree To The [Terms Of Service](#)

[Next](#)

Non-Patient Side Options:

Non-Patient Side Options

Default appointment (minutes) 15

Default appointment invitation SMS

- **Default Appointment length in minutes:** This is the default appointment length that the Create Appointment Page displays. This is to save time when creating appointments. Appointments can be longer or shorter.
- **Default Appointment Invitation:** This option defines the primary method of invitation and can be either SMS or Email. This does not stop invites being sent from the other type of contact details.

Permissions

Permissions allow you to restrict access to certain features and parts of the platform.

	Super Admin	Admin	Clinician
Manual creation of appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Import appointments from .csv file	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Schedule for all Clinics	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Send SMS reminders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reschedule appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Join calls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View clinic waiting rooms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Access all clinics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Send messages from the waiting room	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View other's calendars	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Change passwords	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Change personal details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Change a member's user type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create new users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remove users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change permissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create appointment types	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

By default, your permissions may be set to the following:

There are three User Types that the permissions are defined for, which provides you with three access levels.

Each line represents a feature of the platform that can be controlled. We set the permissions as follows in order to give Clinicians access to their own Calendars and Clinic, but not to **Creating Organisations** and **Organisation Settings**.

Theme and Design

Through the Theme and Design options you can define the colours and branding that your Organisation Members and Patients see.

Theme and Design

Change logo

Upload

High resolution .png or .jpg file in RGB colour mode. Max file size of 1mb

Change primary colour

#005EB8

Change secondary colour

#003d6a

Change button colour

#005EB8

Change text colour

Test Call

Click on the **Profile photo** to create and/or manage your profile **Settings** or **Sign Out** of the portal.



You will be taken to Settings:



Click **"Test Call"**

Test Call


This button enables you to run a series of tests to check:

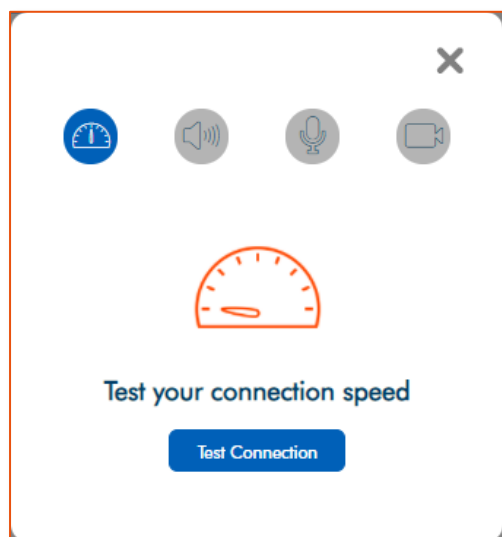
- Your internet connection
- Your speaker
- Your microphone
- Your camera hardware

This test will identify whether they are working and ready for a consultation.

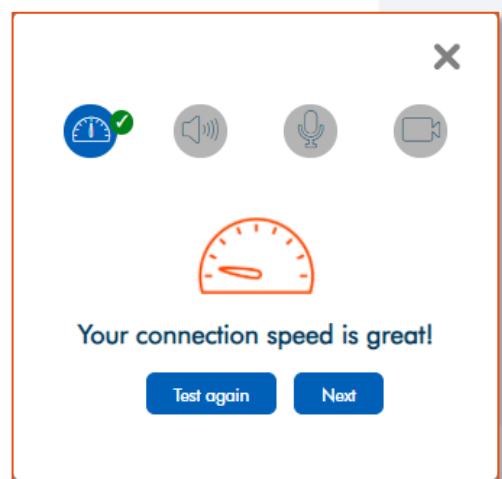
Test Your Connection Speed

First, you will be asked to test your connection speed.
Click the “**Test Connection**” button to test your internet connection speed.

If your internet connection speed meets the Clinic's requirements, you will see the below screen with a  on the speed icon.



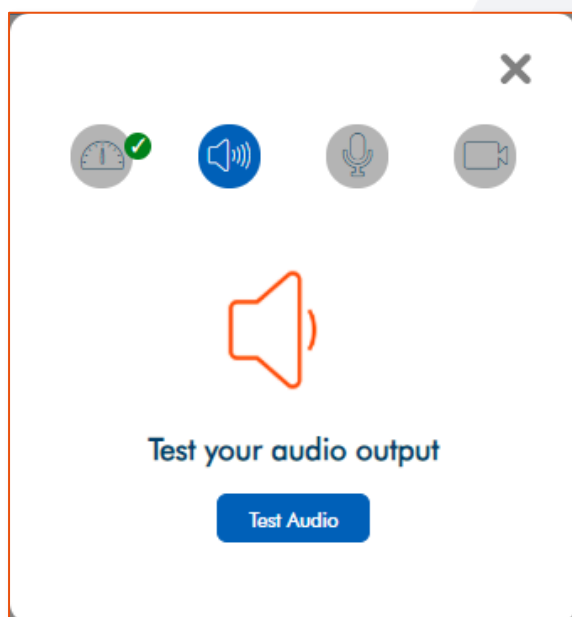
If it doesn't, the system will prompt you to test your internet connection again or get help via [our troubleshoot page](#).



Test Your Audio Output

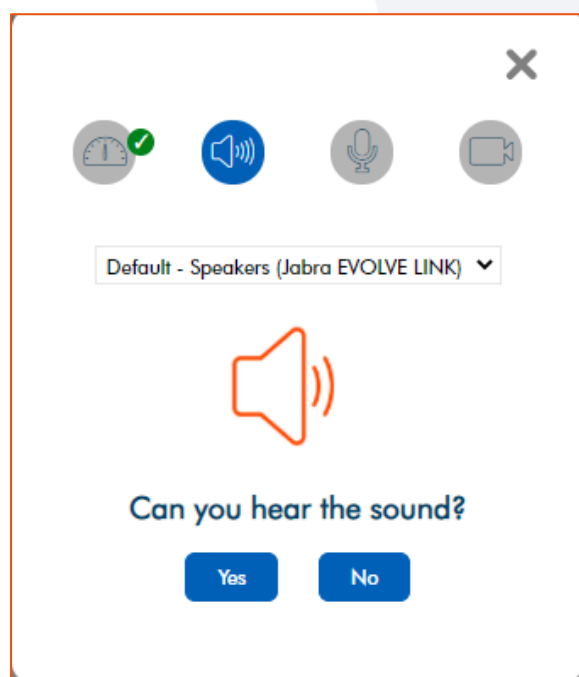
Click the “**Next**” button after you’ve passed your internet connection speed test to test your audio output.


Choose your audio output e.g. headphones, speakers, from the dropdown menu and click the “**Test Audio**” button.



You should hear a sound coming from your headphones or your speakers.

Click on “**Yes**” if you hear the sound.

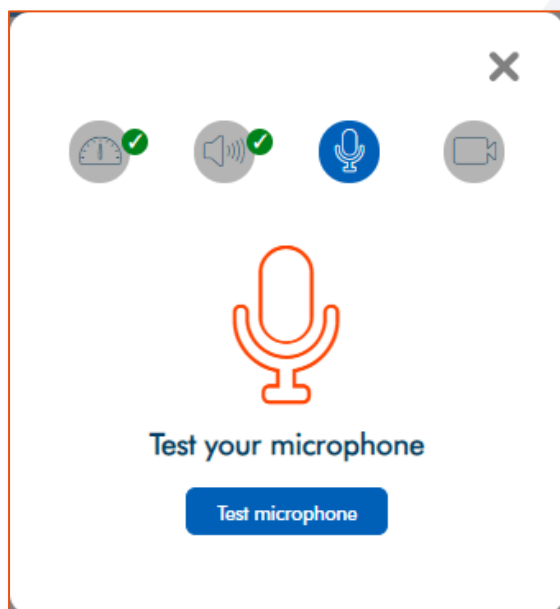


A  will appear on the speaker icon if test is successful. Click “**Next**” to go to the next test.

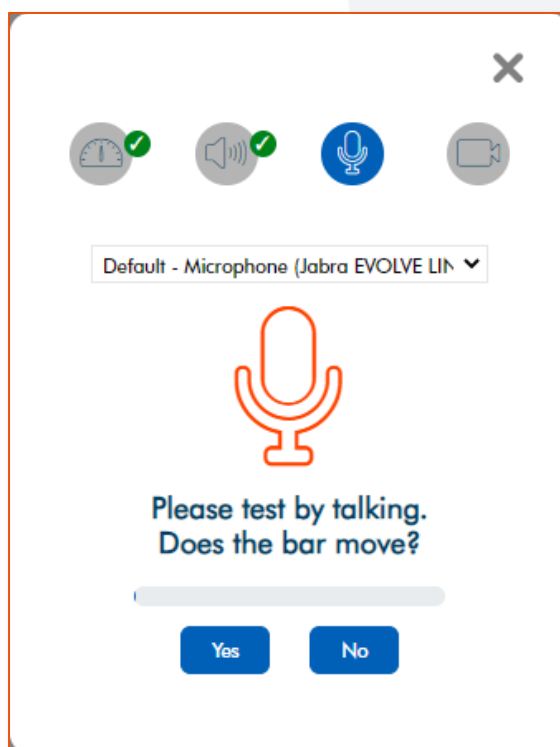
If you don’t hear the sound, click “**No**” to go get help via [our troubleshoot page](#).

Test Microphone

Choose your microphone device from the dropdown menu and click the **"Test Microphone"** button.



You will be asked to speak into your microphone.
You should see the bar moving as you speak into your microphone.

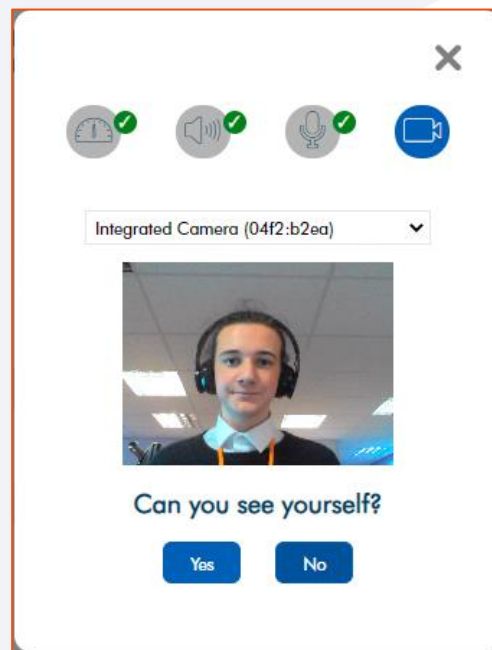
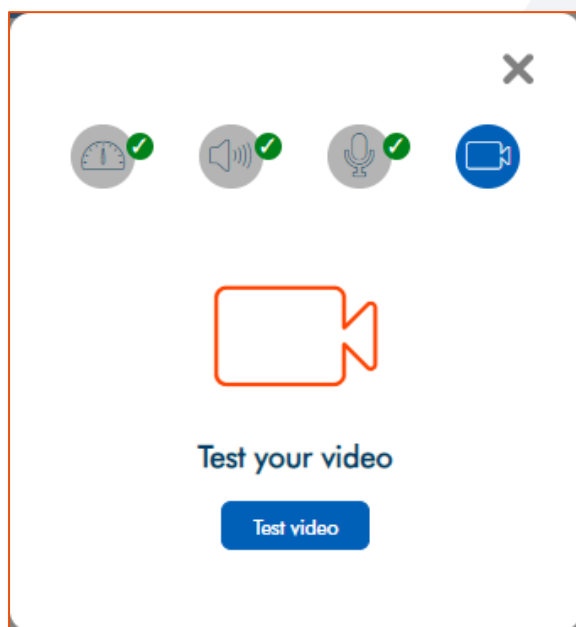


A  will appear on the microphone icon if the test is successful.

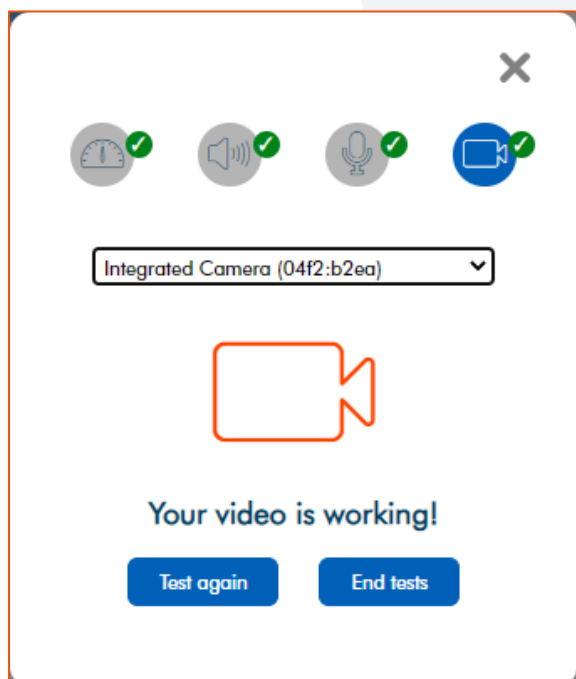
If you don't see the bar moving, click on **"No"** to go get help via [our troubleshoot page](#).


Test Video

Click on “**Next**” to test your camera. Choose a camera you would like to use e.g. webcam, your laptop, phone from the dropdown menu and click the “**Test Video**” button.



You will be asked if you can see yourself on the screen. If you can, click on the “**Yes**” button.



A  will appear on the video camera icon if test is successful. Click “**End Tests**” to end the test.

If you can't see yourself, click on “**No**” to go get help via [our troubleshoot page](#).

Once you have passed the camera test, you have successfully passed all the tests.

Conclusion

Hopefully this guide has answered all your queries on how to use and administer the platform.

If not, please get in touch with us via email at service@visconnclinic.com.