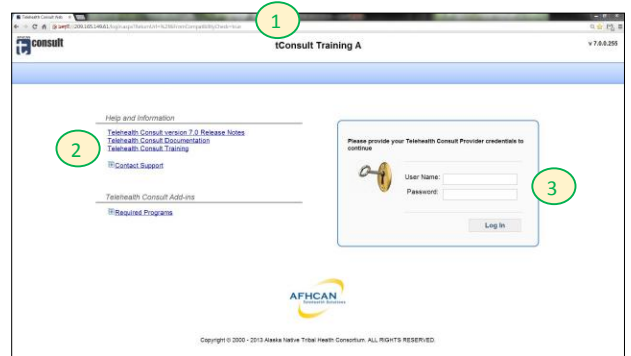


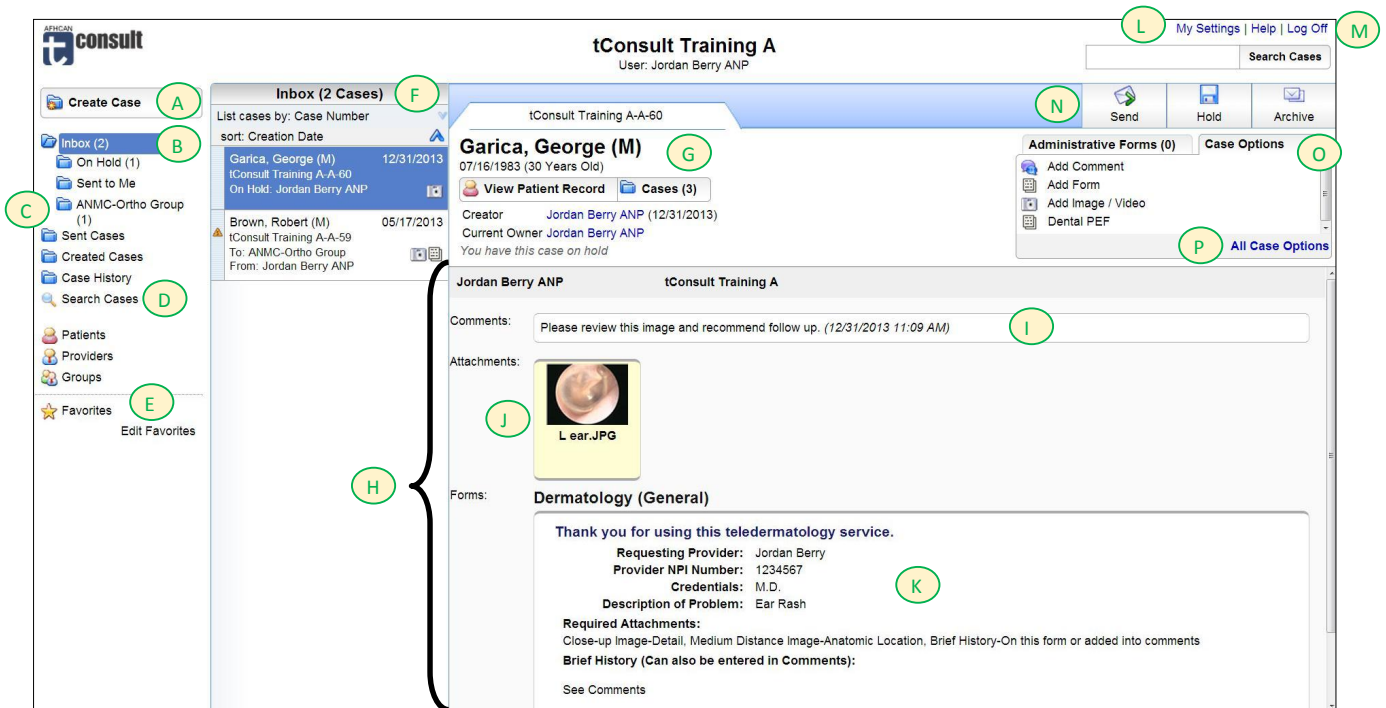
Logging In

1. **Finding Site:** Enter the URL for your local tConsult server in your browser's address bar. If you do not know this address, contact your Clinical Admin User or IT Department.
2. **Help Resources:** On the left side of the screen are links to help items and reference materials.
3. **Log in:** Log in to tConsult using your username and password. If you do not know your username, or have forgotten your password, contact your Clinical Admin or IT Department.



Overview of Main tConsult Window

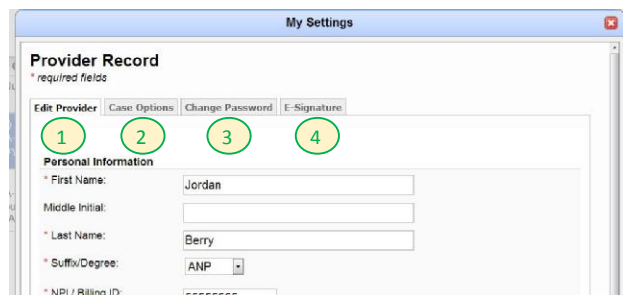
- | | |
|--|---|
| <ul style="list-style-type: none"> A. Create Case: Make a new tConsult case for a patient B. Inbox: Displays all cases in your various groups and folders C. Group Folders: Displays cases for the groups you belong to D. Search: Find patients, users, groups and cases E. Favorites: Allows you to flag and track cases for future reference (See Optional/Advanced section for more details) F. Case List: Displays a list of cases in the currently selected folder G. Patient Information: Basic demographic information for current patient H. Case Viewer: Patient information, case attachments and case actions are displayed here | <ul style="list-style-type: none"> I. Comment: An attached tConsult comment J. Image: An image attached to the tConsult Case K. Form: An attached tConsult form L. My Settings: Change your user settings and other options here (See Change User Settings section for more details) M. Log Off: Leave tConsult N. Case Actions: Send or Archive the current case O. Case Options: Add, edit or view additional case information P. All Case Options: View more case options, or customize existing options |
|--|---|



Change User Settings

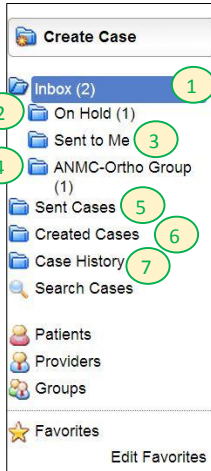
Selecting "My Settings" (G) will allow you to access and edit your user information. Your user data is contained in 4 tabs:

1. **Edit Provider:** Change your personal user information.
2. **Case Options:** Enable email notifications and case return options
3. **Change Password:** Change your tConsult password by entering your previous tConsult password, and then entering and verifying your new password.
4. **E-Signature:** Create an E-signature for tConsult (OPTIONAL)



Inbox and Groups (B): This contains a list of your current cases, groups and filtering options.

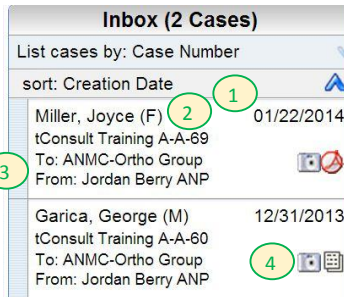
- Inbox:** Contains a total of *all* cases in any of your groups or folders, including groups or items sent directly to you.
- On Hold:** Lists cases that are in progress. **NOTE:** Cases on hold cannot be accessed by other users and must be completed by you!
- Sent To Me:** Lists cases sent directly to you, like On Hold cases these cases are not accessible by other users and must be addressed by you.
- Groups:** Any group that you belong to will appear here. Click on a group folder to view the cases in that group only.
- Sent Cases:** Clicking this folder creates a list of all cases that you have sent. **NOTE:** This can be a long list and may take a moment to load.
- Created Cases:** Clicking this folder creates a list of all cases that you have created. **NOTE:** This can be a long list and may take a moment to load.
- Case History:** Clicking this folder creates a list of *ANY* case that you have viewed or taken any action on. **NOTE:** This can be a VERY long list and will likely take a while to load.



Case List (E): This displays cases for the selected group or folder. Each entry contains:

- Case creation date
- Patient name
- To and From fields
- Icons that indicate Case content

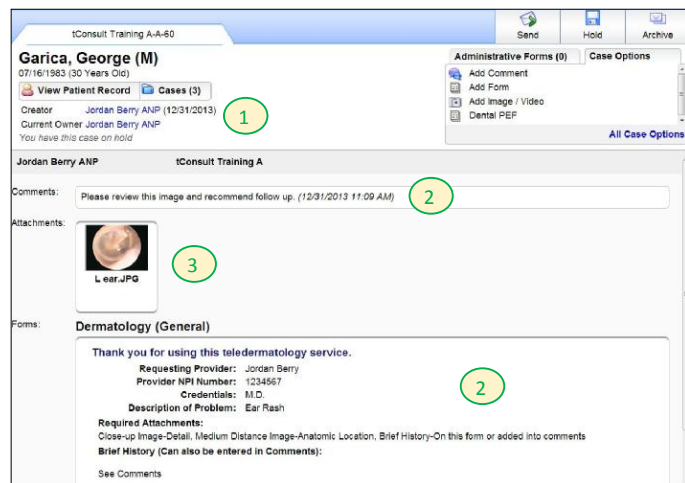
The Case List can also be sorted by using the drop down arrows at the top of the list. The default setting for the case list is *List cases by: Case Number*.



Case Viewer (F): This is the primary area to see case information.

- Case creator and current owner
- Comments
- Attached Forms
- Attached Images

Remember: you can click an attachment to view it in its own window.

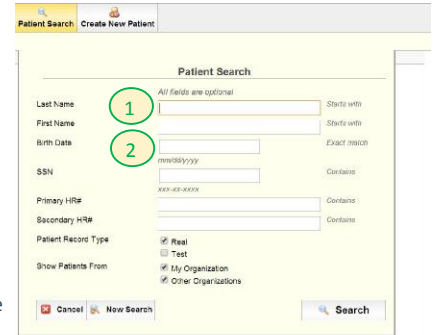


tConsult Web Basics

Search for Patients/Cases (H):

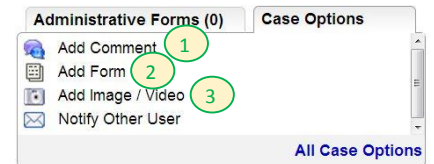
This section contains options to search for patients, providers and groups. Using the Patient search, find patients and their cases. Recommended search criteria:

- First letters of last name
- Date of Birth MM/DD/YYYY



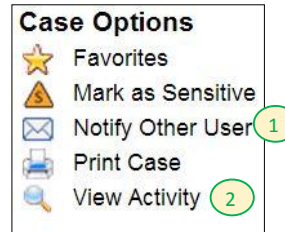
Adding to a Case (N): This area allows you to add information to your case.

- Comments:** Add free text to your tConsult case.
- Forms:** Select a form, populate the fields and save to add a form.
- Images:** Select Choose File, browse to your desired image or video and select add attachment.



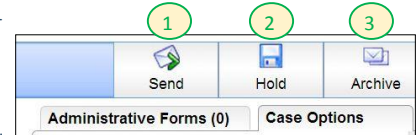
Other Case Options: Select "all case options" in the case options section (N) for additional tools and options including:

- Notify Other User:** Use this option to select a local user to receive an email notification about your current case.
- View Activity:** Toggle View activity on and off to show/hide activity details.



Sending/Archiving a Case (M): This section allows you to Send your case or to Archive your case when it requires no further action.

- Send:** Select the organization and then user or group that you want to receive this case.
- Hold:** The Hold button will put your case in a pending state. Cases on hold can't be modified by other users.



Remember: Sending and Archiving cases cannot be undone. These actions should only be completed when all other case actions are complete.

- Archive:** When a case requires no further communication select archive to place your case in a reference only format. You can always search for and view an archived case.

Optional/Advanced: Here are some more advanced features in tConsult that can make your life easier!

- Customizing Case Options:** By selection Manage under the All Case Options link, you can drag and drop to add or remove actions from your Case Options list.
- Favorites (D):** Create a favorite folder by selecting Edit Favorites (D) then select the Favorites case option to add a link to the case to your favorites folder.