

The logo for Welio, featuring the word "welio" in a white, lowercase, sans-serif font. The letter "o" is stylized with a dark grey, curved shape that loops around its right side, resembling a speech bubble or a stylized "o".

welio

better together

# User guide

## HEALTHCARE PROVIDERS

V1.2.0 - SEPTEMBER 2020



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# 1. Welcome to Welio

## How does Welio work?

Thank you for choosing to use Welio!

Welio works using a secure web browser to allow you to easily connect with your patients by telehealth and secure messaging without worrying about chasing payment.

These instructions will teach you how to login, add new users, set your fees and appointment durations, make appointments, conduct appointments and nominate your bank account for payment.

To start with, open your computer as usual and launch a Google Chrome, Safari 11 or later, or Firefox browser window. These browsers are preferred from a security and stability perspective. Next, go to [clinic.welio.com](https://clinic.welio.com) in your browser then click on the sign in button. You will now be asked to enter your login credentials that have been previously provided to you by your Practice Manager.

## Registering as a healthcare provider with Welio

To register with Welio, we recommend your Practice Manager register the practice first and then set up each doctor/healthcare provider who wishes to use Welio with their account. To do this, you will need your Practice Manager to go to <https://clinic.welio.com/Clinic/Signup>. Once the sign up is completed, our support team will approve the practice as a Welio user, and your Practice Manager will be notified and sent instructions to set you up. Set up takes just a minute or two and then you are ready to go.

## Logging in

To log in go to [clinic.welio.com](https://clinic.welio.com). When you log in the first time, you will need to click on forgot password. Enter the email that your Practice Manager used to register you as a user. Click on Submit. Check your email account and find the email from Welio (check your junk/spam as it may have gone there). Click on the link to reset password. Enter the password you want to use twice. You are now ready to log in to your dashboard.

Once you have logged in you will be presented with your home dashboard. Here you will see your clinic schedule which is arranged by the date of your next consultation first - this filter can be sorted by date by clicking on the 'date' option here. The schedule shows the date, the time, the patient's name, the status of the appointment (i.e. waiting, in progress, completed or cancelled), and the duration of the appointment. You can see any message consultations by clicking on the Messages button on the top banner.



## 2. Setting your fees

Most times your Practice Manager will have set up your fees for you so that Welio knows how much to charge your patients. If your Practice Manager hasn't already set the fees for you, you will need to set them prior to your first consultation.

Go to 'Settings' where you will see the pricing information section. To edit the pricing click the 'edit' button. You'll now be able to set your consultation durations and corresponding patient fees. You can add more duration time blocks by clicking on 'Add Row' (bottom of the screen) then enter duration and corresponding fee. Once you have set your fees for each time block, click on Save (right hand side of screen) then OK to confirm the fee schedule update. The Welio fee is fixed and cannot be altered. The Welio fee is in addition to your fee and paid by the patient for the use of Welio. If a consultation goes longer than the longest duration you have set, Welio will calculate a per minute price based on the information you have provided.

## 3. Making a new appointment

Now you're ready to make a new appointment.

Currently Welio is not integrated with your patient management system (PMS). For now, when a patient books in for a telehealth appointment, your reception staff will book them into your usual PMS system and then duplicate the appointment in Welio for you.

If you wish to create an appointment yourself in Welio, simply click on + new appointment in the Welio dashboard. Enter the patient's mobile phone number with the prefix +61 (remember to remove the zero - e.g. +61 482 888 888) and click 'add appointment'. The next screen will display the patient's details; the first name, last name, email and phone number.

There is also an option to select that the patient is another family member, for example a child or elderly parent. Simply click on 'Patient is another family member' then enter the other family member's first name and family name, click on Save then OK.

Next, select the date, the time of the appointment (this is in 24-hour time and can be set using the up & down arrows or typed in manually) and the duration of the appointment. Make sure the appointment time and duration in Welio match the time and duration in your PMS appointment book. The selected duration will indicate to the patient how much the consult is likely to cost.

Once you have finished adding these details click Save then OK to confirm the appointment has been created successfully. Welio will then send a notification by email and push notification to the patient with the details of their appointment.

You're now back on the home screen of Welio and ready to conduct the consultation!



## 4. Cancel an appointment

Just like making an appointment, your reception staff will cancel appointments in Welio corresponding to any cancellations in your PMS. If you need to cancel an appointment, however, simply click on the appointment you wish to cancel then click on the red cancel button on the panel on the right-hand side of the screen. The appointment will still be visible in the appointment schedule but will have the status Cancelled. Your patient will receive a text to advise them that the appointment has been cancelled.

## 5. Search for appointment

You may want to search to see what appointments you have booked or for a particular patient booking. To see all your appointments booked for a certain date, click on Consult schedule, then clicking on the down arrow next to Select date. This search can be look for current, future or past appointments. Alternatively, to search for a particular patient, type in their first or last name into the search bar on the right-hand side of the dashboard.

## 6. Conducting an appointment

Let's conduct an appointment.

If your consult schedule is not already displayed please click on the 'consult schedule' button and then select the appointment you would like to conduct. This will bring up a screen on the right-hand side of the window which shows the patients name, their photo if they have chosen to use one, the appointment details, along with a message tab, the patients telephone number and a green 'call button' to initiate the consultation.

The patient will already have the appointment details on their phone via the Welio app and will be reminded of their appointment by email and push notification. The patient will enter the virtual waiting room just as they enter your physical waiting room. You will know if they are waiting as the appointment status will be 'waiting'. If they are not waiting or you enter the waiting room and the patient is not there, they will be sent a push notification when you enter the waiting room to tell them that you are waiting for them.

You are now in your consultation! When you enter the consult, you will be asked for permission to use the web cam and microphone connected to or part of your computer. This could include the inbuilt microphone and camera as part of your laptop, or additional camera and microphone hardware as part of your desktop setup. Remember to click ok as soon as possible. You should now be able to see the patient and the patient should now be able to see you.

Welio will now present several interaction options to you:

1. The bottom left of the screen shows how many attendees are in the call.
2. The 'next' button allows you to open the message facility. Here you can type messages to the patient, for example you may want to send them a web link to useful information related to the consultation. You can also upload a picture such as a jpeg or PNG file.
3. The next button is a microphone button which allows you to mute your audio.



4. The third button - the video symbol - allows you to stop transmitting your video stream. You can toggle this on and off at any time and your patient can do the same.
5. The fourth button allows you to stop receiving your patient's video feed if you wish to maximise bandwidth
6. The fifth button, the telephone symbol, will end the call.

You may at any time choose to resize your internet browser screen without this effecting your Welio consultation. For example, you may like to narrow your window so it can be open at the same time as your PMS. This way you can see all of your consultation notes for the patient and enter notes for this consult like you typically would in person.

To end the consultation, click on the red telephone button. You will then need to click OK to confirm you want to exit the virtual consult room.

You are now back to the main screen for Welio. You will see that the consult you just conducted remains in progress. This means that you can call the patient back as many times as you like and each consult will add to the total duration and therefore the total bill for the patient. This means that if for any reason the call drops out you can simply reconnect without any undue additional charge to the patient. It is a good idea to let the patient know this at the beginning of the call and tell them to re-enter the waiting room if that happens.

Once you have finished the consultation it is important you click on the blue 'finish' button in the panel and then 'okay'. The consultation will not be billed and payment taken until you do this.

## 6. Message consults

Unique to Welio, is the ability for your patients to message you outside of a scheduled consultation. Messages can only be initiated by the patient. These messages attract a fee in the same way consultations do, at a rate set by you.

From the main dashboard read and response to messages by clicking on 'Messages' The number of messages waiting for you will be shown to the right.

After clicking on the message type, you will see a list of patients who have sent you a message. Click on the patient and reply to their message accordingly. You can reply by text, video or audio:

1. To send text, type in a message then click on Send
2. To send video, click on video icon, click on start then stop then send
3. To send audio, click on microphone icon, click on start, then stop then send

Click on close if you want to continue the messaging and await your patient's reply or end if the messaging consult is to be finalised. The patient will not be charged until you click on End. You will need to click on OK to confirm that you want to finalise the message and OK again.

If you do not want your patients to be able to message you outside of a scheduled consultation, you have the option to opt out of this function. If you choose to opt out, your patients will be prevented from messaging you and receive a pop-up notification to make a telehealth consultation or ring the practice instead.



## 7. Billing

Currently Welio is not integrated with your PMS for billing, though this is planned for future versions. For now, you will need to finalise your visit in your PMS and enter billing as usual, duplicating the final fee in Welio in your PMS i.e. if Welio charged \$73, this is the fee you put through your PMS. Your reception team will then finalise the billing via your PMS as usual with the exception of processing the payment through your eftpos machine as this has automatically been done for you by Welio. In other words, for a private account, they will receipt the billing off manually (e.g. in Best Practice they will untick TYRO) & send patient's Medicare claim by electronic claiming. For bulk billed appointments there is the option in Welio to click on No Charge at the end of the consultation. For these, your reception team will send the billing to Medicare via the usual process using your PMS. Your Practice Manager will then reconcile Welio payments against the payments report available in your PMS at end of each billing period.

## 8. My profile

Click on the picture icon next to your name on the top right-hand side of the dashboard where you will access the following:

### My Profile

Click on the picture icon on the top right-hand side of the dashboard then My Profile and Edit. Update your details including your title, name, provider number, email, phone number and password. To add/change your photo, click on the small blue circle at the bottom of the picture icon and navigate to a location on your computer to select a photo the use the slide bar to zoom in or out as required then save. Once you've made all your changes to your profile, click on Save then OK.

### Change Clinic

If you are using Welio at more than one location, you can change which dashboard you are looking at by clicking on change clinic then clicking on the drop-down menu and selecting the clinic you want to change then continue, as long as your log in details are the same.

### Sign out

When you have finished consulting for the day, don't forget to click on sign out then OK to confirm you want to sign out.

### Return to the dashboard

To go back to the main dashboard, click on the Welio logo on the top left hand-side of the page.



## 9. Settings

### Pricing

The main thing you'll want to access in settings is your pricing. As mentioned earlier, if you need to change your pricing, click on Pricing then edit. Make your desired changes then click on Save.

### Check invoices

To check of all your completed consultations and asynchronous messaging, click on Invoices on left hand side of the screen

### Setting up a connection with your PMS

This is not functional at the moment but is a feature that will be available in future versions

## 10. Troubleshooting

### The video won't connect

This is an uncommon error. If this occurs, close the app and restart Welio.

The doctor may need to make a new appointment and the doctor and patient may need to use this new appointment to perform the consult.

### I can't hear my patient, or my patient can't hear me

Check that you have the volume on your speakers or earphones turned up. Check that you haven't inadvertently click on mute.

## 11. Contact us

For more help or feedback about the app, send us an email to [support@welio.com](mailto:support@welio.com)



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