

The logo for 'welio' is displayed in a white, lowercase, sans-serif font. The letter 'o' is stylized with a dark grey or black circular element on its right side, creating a unique graphic effect. The background of the entire page is a teal color with a repeating pattern of light teal, stylized, interlocking circular shapes.

better together

User guide

PRACTICE MANAGERS

V1.3.0 - MAY 2021



Table of Contents

1. WELCOME TO WELIO	3
Install the App	3
2. REGISTER YOUR CLINIC	3
3. REGISTER YOUR CLINIC USERS	3
4. MAKE A USER INACTIVE	4
5. CONNECT YOUR CLINIC TO STRIPE	4
6. MAKING APPOINTMENTS	4
7. CANCELLING AN APPOINTMENT	5
8. SEARCH FOR APPOINTMENT	5
9. BILLING	6
10. CHANGE CLINIC	6
11. MY PROFILE	6
My Profile	6
Change Clinic	7
Sign out	7
Return to dashboard	7
12. SETTINGS	7
Clinic Details	7
Clinic Bank Details	7
Pricing	7
Invoice	8
Connector	8
Users	8
Reports	8
13. CONTACT US	8



1. Welcome to Welio

Install the App

Thank you for choosing to use Welio!

Welio works using a secure web browser to allow the healthcare practitioners in your practice to easily connect with their patients by telehealth and secure messaging without worrying about chasing payment.

These instructions will teach you how to register your clinic, set up your users accounts, connect your practice to the stripe payment system, add and cancel appointments, download reconciliation reports for each of your healthcare providers.

Individual user guides have also been created for health care providers, receptionists and patients.

2. Register your clinic

The first thing you will need to do is register yourself and your clinic. 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 www.clinic.welio.com. This will take you to the login page. As a first-time user, click on 'Sign Up' under Clinics. Under Healthcare Profession, enter your details selecting Practice Manager from the drop-down menu under role and then your clinic specialty e.g. for General Practice, select GP. The next section asks you to enter your clinic details. Once these have all been entered, click on 'I'm not a robot' then Sign Up. You will then receive an email with a link to set password which will activate your account. Once your registration has been checked by our Welio Support Team, you will also receive an email notifying you that your clinic has been approved.

3. Register your clinic users

The next step is to register your healthcare providers and reception staff. To do this you will need to log in to Welio using the email and password you set when you activated your account. After logging in you will be taken to the dashboard. Click on Settings on the right-hand side of the screen and then Users.

You will need to repeat the following steps for each user you create.

To add a new user, click on Add new user then enter the following:

- User type: Doctor or Receptionist
- Profession: Choose the speciality e.g. GP
- First name
- Last name



- Email
- Mobile number

Once you've entered the user's details, click on send invitation. Then click on OK to confirm details were updated successfully. The user at this stage will have the status of Pending and will receive an email to welcome them to Welio and activate their account.

Advise the user to click on the link and set their password. If they can't find the email, ensure they check the spam/junk box. Once this is done the user's status will change to active and they can log in and start using Welio.

4. Make a user inactive

Staff and healthcare providers sometimes leave. When they leave your clinic, you will need to make them inactive from your Welio account as part of your 'offboarding' process. Following the same steps you followed to set up a user, go to Users via Settings. Find the user, click on them and then edit. From here, select closed from the drop-down menu then click on Save and OK to confirm you are closing the user account. Once a user is closed, appointments can no longer be made for them and they will no longer be able to log into their user account unless they are linked to another clinic using the same log in details. They can be re-activated at any time should they return to work at your clinic.

5. Connect your clinic to stripe

In order for Welio to process payments for completed consultations, you will need to connect your practice, including the bank account details that you want to receive the money into, to Stripe. To connect to Stripe, click on settings then 'Clinic Bank Details' on left hand side of screen then click on 'Connect to Stripe'. This will take you to the Stripe website where you will need to complete the details required including your location, business details, accounts details and so forth. You will need to know your clinic's bank details as well as company name and ABN so make sure you have these on hand when you are ready to connect. For more information on how to connect to stripe, please view our set up guide at <https://www.youtube.com/watch?v=h5lRGD6i18Q&t=1s>. Once you have finished completing your details click on Authorise Access to this Account. If successful you will be given a backup code. We recommend documenting this in a safe place for future reference should you ever need it. You will then be taken back to Welio and you will see the Connect to Stripe button has changed to 'Disconnect from Stripe'. Your clinic is now set up to receive payments for telehealth appointments automatically via Welio!

6. Making appointments

Clinics using Best Practice

For clinics using Best Practice, Welio syncs with your appointment book and will automatically create an appointment in Welio for the patient where the appointment in Best Practice has the



appointment type 'Telehealth Consult' is used and the patient's file in Best Practice has the requisite demographics - name, date of birth, mobile number, gender, and email. Any appointments cancelled or moved in Best Practice will also be cancelled or moved in Welio. Welio will notify you of any patient Telehealth consult appointments that don't sync by sending you a Sync Error email with the error details. This can act as a prompt to update the patient details in Best Practice to enable the patient to use Welio.

Clinics using other Patient Management Systems (PMS)

For clinics using another PMS type, your reception team will need to create a duplicate appointment for them in Welio. After booking the appointment in your PMS, click on + new appointment in the Welio dashboard. Enter the patient's mobile phone and click 'add appointment'. If the patient has registered for Welio already, the next screen will display the patient's details; the first name, last name, email and phone number. For patients who have not yet downloaded Welio and registered as a user, you will need to enter these details.

There is also an option to select that the patient is another family member where the mobile phone number owner is not the patient. For example a child or elderly parent. Simply click on 'Patient is another family member' then enter the other family members first name and family name, click on Save then OK.

You then need to click on the drop-down menu to select the specific healthcare provider who the patient will be having their consultation with. 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 SMS to the patient with the details of their appointment.

You're now back on the home screen of Welio and your healthcare provider can conduct the telehealth consultation!

We recommend creating a unique icon in your PMS to identify Welio telehealth appointments.

Your healthcare provider can now conduct the telehealth consultation!

7. Cancelling an appointment

Clinics using Best Practice

To cancel an appointment simply follow your usual process in Best Practice. Welio will sync with Best Practice and cancel the appointment in Welio.

Clinics using other Patient Management Systems (PMS)

Just like making an appointment, appointments cancelled in your PMS will also need to be cancelled in Welio. To cancel an appointment, your reception team need to select the appointment 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.

8. Search for appointment

You may want to search to see what appointments have been booked or search for a particular patient booking. To see all appointments booked for a certain date, click on Consult Schedule, then click on the down arrow next to select date. This search can be used to 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.

9. Billing

There are no changes to the doctors workflow when finalising billing. They simply finalise the visit in the PMS as usual. Your reception team will then need to finalise the billing as usual with the exception of processing the payment through your eftpos machine as this has automatically been done by Welio. In other words, for a private account, the billing needs to be receipted off manually in your PMS (e.g. in Best Practice, untick TYRO) & the patient's Medicare claim sent by electronic claiming. As no payment is processed for bulk billed appointments by Welio, these will need to be sent to Medicare via the usual process using your PMS. By signing up to Welio, the patient has already consented to being charged a private fee, but for bulk billing, we recommend that your healthcare providers document in the notes that the patient has verbally consented to assigning their Medicare benefit for the particular visit.

Reconciling with your accounting software

For practices who reconcile all payments from their PMS with their accounting software (e.g. Xero) we recommend identifying individual payments by receipting all Welio payments off in the practice PMS with a unique payment reference (please see billing in the Reception User Guide). You will automatically be sent a CSV report each day to your nominated bookkeeping email account with all Welio transactions for the day before and a failed payments report so you can easily identify if any patient payments were not successful. While these do not occur very frequently, these can then easily be followed up by contacting the patient and getting over the phone payment.

10. Change clinic

You and your team of staff and healthcare providers may work across multiple clinics for the one organisation or separate organisations that use Welio. If this is the case and you need to manage appointment books across multiple sites, you can change clinics within Welio provided you are using the same login details for both sites. To change clinics, click on the picture icon on the top right-hand side of the page, then select 'change clinic'. Using the drop-down menu, select the clinic you want to go to and then click on Continue.



11. 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, email, phone number and password. Provider number is also there but is only required for health care providers who have a Medicare Provider number. 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

As mentioned earlier, 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.

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 dashboard

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

12. Settings

In settings, you will be able to make changes to the following:

Clinic Details

You may for one reason, or another need to update your clinic's details. To do this, click on Settings (top right-hand side of screen). It will by default open on clinic details. Click on Edit then on each of the following fields to update details as required:

- Clinic Name
- Address line 1
- Address line 2
- Suburb
- State
- Postcode
- Clinic phone number



When you are happy with your changes, click on Save to save changes

Clinic Bank Details

Here you will be able to add in your bank details and connect to Stripe - which is what Welio uses to process payments from your patients. To connect to Stripe, please see above - 5| Connect your Clinic to Stripe.

Pricing

Prior to the first consultation, pricing will need to be set for each healthcare provider. This can be done by the provider themselves via their log in or yourself as the Practice Manager. Pricing is set by duration and amount and this will vary from clinic to clinic.

To set the prices, click on video consult on the Welio log on the top right-hand side of the screen, click on Settings (top right-hand side of screen). It will open on clinic details.

Invoice

This section is not currently. You will be emailed a payments report daily to your nominated email address.

Connector

The feature is not enabled. Currently integration is available for Best Practice users. The details for integration are sent to your Practice Manager / Practice Principal when the clinic first signs up and is set with assistance from your own IT provider.

Users

This is where you will add users and make them active or close them once they are no longer associated with your practice as described in 3| and 4| earlier

Reports

We recommend reconciling your payments with your billing and accounting software, especially for any failed payments. Welio will send two reports by email to the practice manager's email address each day for the prior day's appointments and billings to enable you to do this: 1. All payments; and 2. Failed payments

The reports are in CSV format and include:

- Date of appointment
- Doctor
- Account Holder
- Patient (if patient was another family member)
- Status (New, In Progress, Finished or Cancelled)
- Scheduled start time
- Actual start time
- Expected duration
- Actual duration



- Expected Fee
- Actual Fee
- Paid status (paid or not yet paid)
- Error Message e.g. card declined

The benefit of using a CSV file is that you can click on Data then Filter to filter components of the report as you desire e.g. filter by individual doctor etc.

13. Contact us

For more help or feedback about the app, send us an email to support@welio.com and one of our support staff will contact you as soon as possible.



Email support@welio.com

Phone 0459 927 732

welio.com

Welio Pty Ltd | ACN 615 889 257 | Level 1, 144 Indooroopilly Road, Taringa QLD 4068