

QuickStart Guide

dr2dr – Consolidated Overview

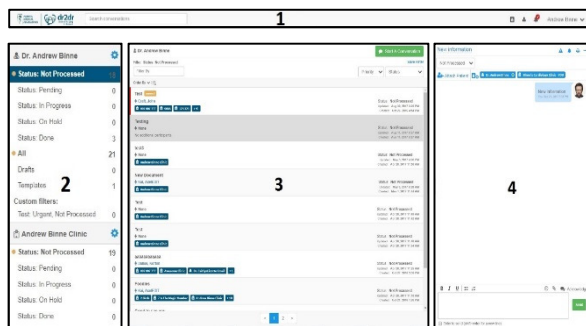
Log in to dr2dr for the First Time

1. Open your new account email
2. Obtain the temporary password provided in the email
3. Click the link specified in the email
4. Enter your email and temporary password



Home Screen Overview

The Home Screen is divided into four sections:


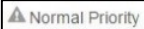



1. **Navigation Bar:** Displays the start a conversation button, search conversations box, address book, connection requests, notifications, and the personal options menu.
2. **Mailbox Panel:** Displays your accounts mailboxes, filtered messages folders, and accounts settings.
3. **Conversation List:** Displays the list of conversations, conversation filter and priority settings, and the Start Conversation button.
4. **Conversation Viewer:** Displays new or existing conversation, or the currently selected conversation.

Starting a New Conversation

- Click **Start a Conversation** 

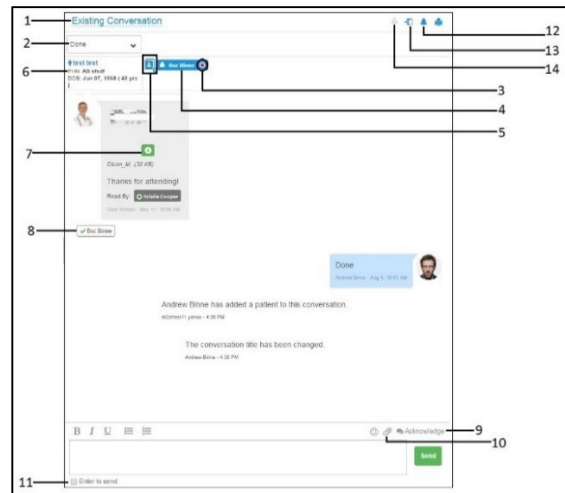
There are a few unique functions in the new message window:

- Change the **From Account** the message is sent from: 
- **Change Priority** from normal to urgent: 
- **Add Patient Records** 

Replying to an Existing Conversation

To reply to a conversation, click on the conversation to open it in the conversation viewer panel.

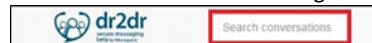
There are a number of available functions when replying to a conversation:



1. Current subject button
2. Change status menu
3. Participant online indicator
4. Conversation participants
5. Add participant
6. Attached demographics indicator
7. Open attachment
8. Message read indicator
9. Request acknowledgment icon
10. Add attachment icon
11. Enter to send check box
12. Change conversation notifications
13. Leave conversation
14. Toggle priority

Searching for a Conversation

To search for a conversation, enter the term in the **Search Conversations** field on the navigation bar:



- This method searches through all conversations in dr2dr.

Or search using the **Filter By** field on the conversation list panel:

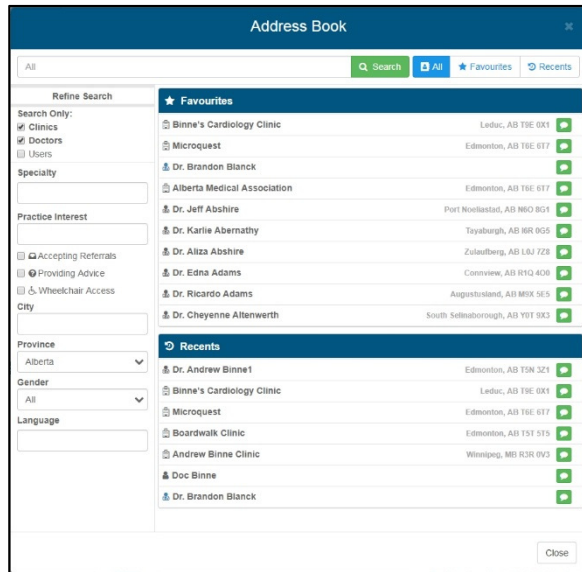


- This method searches only those conversations that meet the current criteria.

QuickStart Guide

Open the Address Book

- Click **Address Book**  on the navigation bar



Address Book Overview

The address book window contains the following functions:

- Search** box: search the address book for a clinic, doctor, contact, or user
- Refine Search** filters: applies filters to your search helping you locate the desired contact

Searching the Address Book


Using the Search Bar

- Open the **Address Book**
- Enable **Clinics, Doctors, Contacts, or Users** under **Type**
- Enter the clinic, doctor, contact, or user's name in the **Search Clinics** field

- Click **Search**

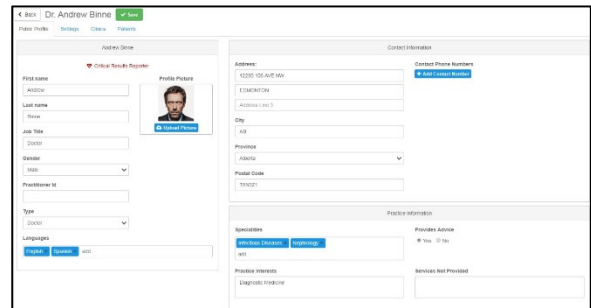
View or Change Your Personal Public Profile

To view or change your public profile:

- Click **Personal Settings**  on your personal account mailbox




This will display the public profile page:




From here you can update:

- First and last name
- Gender
- Profile picture
- Languages spoken
- Address and phone numbers
- Specialties, Practice interests and services not provided
- Practitioner ID
- If you are providing advice

To apply any changes, click **Save** 

Set Your Personal Away Status

- Click **Personal Settings**
- Click the **Settings** tab 
- Click the **Set Status** menu
- Click the desired away status: **Available, Sick, Vacation, or Away**
- Type an optional, personalized away message
- Click **Save**

View or Change Your Notification Settings

- Click **Personal Settings**
- Click the **Settings** tab
- Set the desired frequency: **Never, Always, Only if I'm Offline, or Only Once per Conversation if I'm Offline**
- Set the desired method: **Email, SMS(Text Message), or Both**
- Click **Save**