

dr2dr – Patient Management and Conversation Reporting

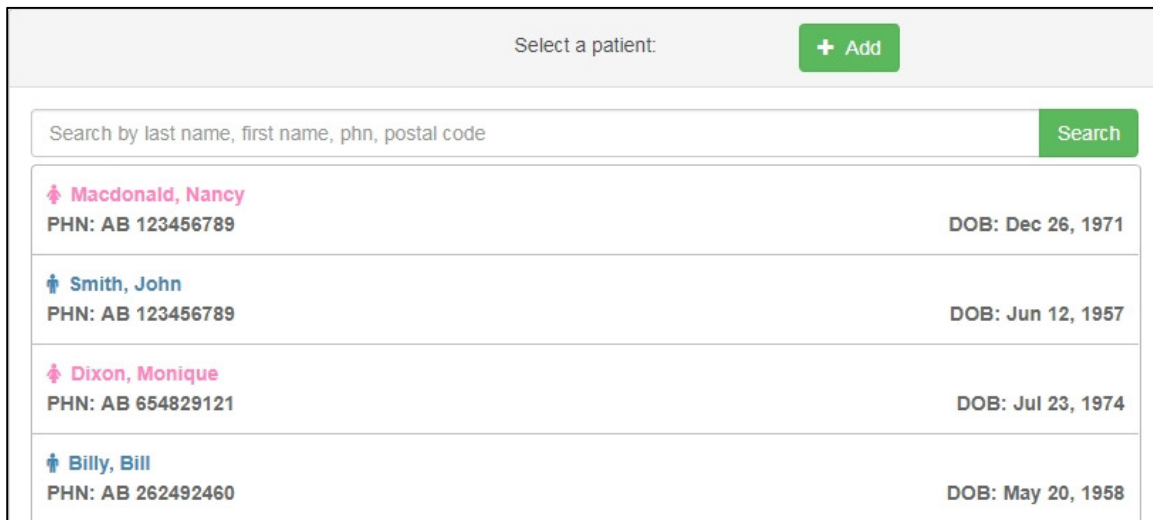
Patient Management

To access the patient management screen:

1. Click **Personal Settings**





2. Click the **Patients** tab

Patients



Select a patient: + Add

Search by last name, first name, phn, postal code Search

 Macdonald, Nancy PHN: AB 123456789	DOB: Dec 26, 1971
 Smith, John PHN: AB 123456789	DOB: Jun 12, 1957
 Dixon, Monique PHN: AB 654829121	DOB: Jul 23, 1974
 Billy, Bill PHN: AB 262492460	DOB: May 20, 1958

Add a New Patient Record

To add a new patient:

1. Click **Personal Settings**
2. Click the **Patients** tab
3. Click **+Add** + Add
4. Enter the patient information into the new patient record window

Edit a Patient Record

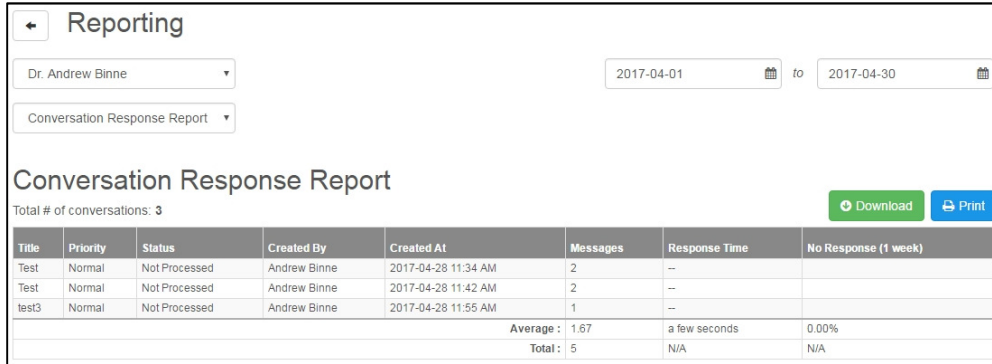
1. Click **Personal Settings**
2. Click the **Patients** tab
3. Click on the desired patient record
4. Click **Edit** Edit
5. Edit the patient record as desired
6. Click **Save** ✓ Save to save the changes

QuickStart Guide

Conversation Reporting

The reporting feature provides a detailed list of all conversations you are a part of: conversations you have started or conversations you are a recipient of. To access reporting:

1. Click the **Personal Options** menu 
2. Click the **Reporting** tab 



Reporting

Dr. Andrew Binne 2017-04-01 to 2017-04-30

Conversation Response Report

Conversation Response Report

Total # of conversations: 3 [Download](#) [Print](#)

Title	Priority	Status	Created By	Created At	Messages	Response Time	No Response (1 week)
Test	Normal	Not Processed	Andrew Binne	2017-04-28 11:34 AM	2	--	
Test	Normal	Not Processed	Andrew Binne	2017-04-28 11:42 AM	2	--	
test3	Normal	Not Processed	Andrew Binne	2017-04-28 11:55 AM	1	--	
Average :					1.67	a few seconds	0.00%
Total :					5	N/A	N/A

The conversation response report provides the following details:

- **Title:** subject of the conversation
- **Priority:** conversation’s priority
- **Created By:** name of the user or clinic that created the conversation
- **Created At:** date and time the conversation was created
- **Messages:** number of messages within the conversation
- **Response Time:** indicates the time between creation and the first message in the conversation
- **No Response:** indicates if there was no response to the conversation within one week

Generate a Report for another Clinic

Select a clinic from the **Account** menu to generate a report for another clinic



Change the Date Range for a Report

Click on the displayed dates to change the date range for the report.



Download or Print a Report

Click **Download** to download the report in a .CSV format



Click **Print** to print the current report

