SnapDragon_Dr

Administrative Guide – Ver 2

Administrative Guide for Physician Practice

This guide is intended for the Organization's SnapDragon Administrator who is responsible for managing the Organization's Information, Users, and SnapQs within the SnapDragon service. Additionally, this local user is designated as the point of contact to SnapDragon Medical. If there is no longer a SnapDragon Administrator in your organization, contact Client Services for a User Change Request to designate a new administrative user.

Administrators access an additional link from SnapCentral™ by expanding Setup and selecting Organization Setup. This link is only displayed for Administrator users. Within Organization Setup, six main sections display:

- **Practice Profile** - Name, Addresses, Phone Numbers

- **Business Structure** - Business IDs, Pin Number Creation

- **User Management** - Create, Update, Deactivate, Reset Password, Setup Electronic Signatures

- **SnapQ™ Management** – Create, Update, Rename, Add or Remove Users to SnapQs, move transaction types to different SnapQs

- **Downloads** – SnapConsole™, SnapPrinter™ download site

To move to a specific section, click the link located in the Organization Setup tree. Once in a section, required fields are marked with⚠ and must be completed. To save information in that section, click the Verify & Goto Next Section button. This will save the information for the current section and move to the next section. Further detail on each section follows.

Practice Profile

Clicking Practice Profile displays the Profile page. This page contains the Organization's Name, Address, phone and fax numbers which were populated during the registration process. This information can be changed as necessary with the exception of Organization Name. Contact client services to notify them of the name change.

Business Structure

The practice's business ID information such as SSN or FEIN is entered here along with the D/B/A information if applicable.

Every organization is required to have a Personal Identification Number (PIN). In order to maintain patient confidentiality and HIPAA compliance, a support agent is only able to view your organization's information, which includes communications regarding patients, with the organization's PIN. Giving the agent the PIN, gives the agent the ability and permission to login and view that information.

Add or change the Organization PIN:

1. Type the desired PIN in the Organization Pin field.

2. Retype the Pin in the Re-enter Org PIN field.

3. Click the Verify & Goto Next Section button, the two entries are verified that they match.

4. If the entries do not match, a pop-up screen will advise you. Click OK and retry.

5. When the entries match, the pop-up screen does not display, the PIN has been accepted and will remain until changed.

The second screen of the Business Structure documents the FL State Lic. # and areas served. The License was populated during the registration phase. The available Counties-Cities are designated by the entries in the box on the left-hand side of the screen. The right-hand box designates areas served by your organization.

User Management

User Management is used to add users, add UPIN users, edit users, and reset user passwords. Once present in the system, users can create and respond to SnapPacks, communicate with other subscribers through SnapConsole™ and manage patient information. UPIN users have the same capabilities as users, along with the ability to electronically sign documents and delegate referrals and patient management.

Add a new user:

1. Navigate to Setup, Organization Setup, User Management.

2. Click the Add New User button.

3. Complete the User's information.

4. The User ID is the login that the user will use to login to SnapCentral and SnapConsole.

5. To Save and return to User Management click Save, to Save and continue adding new users, click Save & Add New.

6. The user's email address will be used to email their password to them upon the completion of their record.

a. If the user does not have an email address, after the record is saved, reopen the record by selecting the user's name from the User Management screen and click print password. This printout is to be given to the user to provide the required information to login. Note: Make sure pop-up blockers are disabled.

7. Immediately upon logging in, new users will be prompted to change their passwords and create security questions. The security questions will be used in the future if they forget their passwords. The user's status will then change from Print/Send/PW to Active.

8. Once users are added, they will need to be added to the proper SnapQ(s). This topic is covered in the SnapQ management section.

Edit user information:

1. Navigate to Setup, Organization Setup, User Management.

2. C lick on the user's name to open their record.

3. Make necessary changes.

4. To Save, click the apply button

Reset a user's password:

1. Navigate to Setup, Organization Setup, User Management.

2. Click on the user's name to open their record.

3. Check the Create Temporary Password box.

4. Click the Apply button.

5. If an Email address was present in the user record a new password is emailed to the user upon clicking Apply.

a. If the user does not have an email address, after the record is saved, reopen the record by Clicking on the user's name from the User Management screen and click print password. This printout is to be given to the user to provide the required information to login. Note: Make sure pop-up blockers are disabled.

6. Immediately upon logging in with the new password, the user will be prompted to change their password and will be taken to the Password Management screen.

Deactivate a user:

1. Users are deactivated, rather than deleted to maintain the history of their work. They are no longer able to login once deactivated.

2. Navigate to Setup, Organization Setup, User Management.

3. Click on the user's name.

4. Click the Deactivate link at the top of the record.

5. To Save, Click the apply button.

6. The deactivated user is listed in User Management with a status of deactivated.

7. To activate a deactivated user, click on the user from User Management, click the Activate link at the top of the record. Click the Apply button to save the change.

Add a new user who is an authorized signor:

1. Click the Add UPIN User button.

2. The Add UPIN User window opens.

3. Complete the User's information.

4. The User ID will be the login that the user will use to login to SnapCentral and SnapConsole.

5. The email address will be used to email the user's password to them upon the completion of their record.

   a. If the user does not have an email address, after the record is complete, click Save, reopen the user's record by clicking on their name from the User Management screen and click print password. This printout is to be given to the user to provide the required information to login. Note: Make sure pop-up blockers are disabled.

6. To Save and return to User Management click Save, to save and continue adding new users, click Save & Add New.

7. Immediately upon logging in, new users will be prompted to change their passwords and create security questions. The security questions will be used in the future if they forget their passwords. The user's status will then change from Print/Send/PW to Active.

8. The user can now use the system, but to electronically sign documents, they are required to setup an electronic signature.

Setup electronic signature for signor (Print Affidavit):

1. The Administrator may print the Electronic Signature Affidavit for the signor:

2. *After the User's information has been saved, from the User Management screen, click the Setup link located to the right of the User ID under the Digital Sig. heading. Note: N/A in the Digital Sig. column signifies that this is not a UPIN user. If the user is supposed to sign documents, re-add them as a UPIN user.*

3. The Digital Signature page displays.

4. Click the Print Affidavit button to print the Electronic Signature Affidavit.

   a. Alternatively, the Signor has the capability of printing the Electronic Signature Affidavit from, My Setup, Digital Signature section. Click the Print Affidavit button.
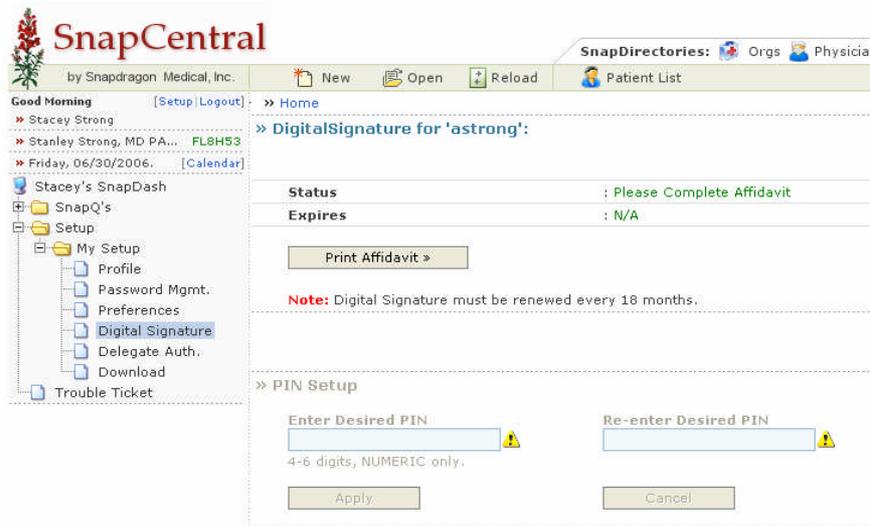
5. The Signor should complete the information on the form, sign the Affidavit and fax back to SnapDragon Medical for verification.

6. Upon successful verification, the signor will be notified and referred to the Digital Signature section to create their PIN to be used for electronic signing. For security purposes, the signor is the only user who can create this PIN.

7. To electronically sign a document, the PIN is used to verify that the signature is the Signor's so the PIN must be kept confidential. Likewise, this PIN should never be given to SnapDragon Medical personnel. If the Signor feels that the security of their PIN has been compromised, they should change it immediately in the PIN Management section on the Digital Signature page of My Setup.

Change digital signature PIN

1. The Authorized Signor's PIN is used by the signor for security purposes as the verification that they were the actual signor. The PIN should only be known by them and it is their responsibility to maintain its security. If they feel that the PIN is no longer secure, it should be changed immediately following these steps.

2. The Authorized signor logs into to SnapCentral.

3. Navigate to Digital Signature by clicking on Setup, My Setup, and Digital Signature.

4. The Digital Signature window displays.

5. Scroll down to the Pin Management section.

6. Type in the current PIN in the designated field.

7. Type the new pin in the New Desired PIN field. Retype the new Pin in the Re-enter Desired PIN field.

8. Click Apply to save the new PIN.

9. The PIN has been changed and should be used the next time a document is electronically signed by this authorized signor.

SnapQ™ Management

The default SnapQs are the PracticeQ and a named SnapQ for each UPIN user. The PracticeQ is setup for all transactions and the UPIN user SnapQs are setup for transactions awaiting their electronic signature.   Additional SnapQs can be created to accommodate workflow.

An example could be setting up a SnapQ for a user that handles discharge summaries:

- A SnapQ called Discharge Summary is created
- Discharge Summary transactions are mapped to that SnapQ
- Users responsible for handling that type of transaction are placed as users accessing that SnapQ
- Discharge Summaries now display in the Discharge Summary SnapQ

Create a SnapQ:
1. Navigate to Setup, Organization Setup, Q Management.

2. The SnapQ Management Screen displays with the options to edit, rename, add new and cancel.
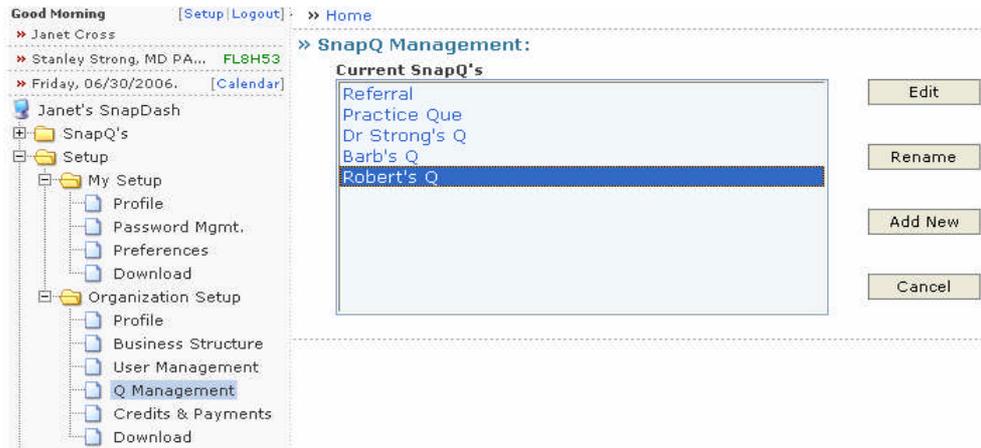
3. Click the Add New button.

4. A new window displays, In the New SnapQ box, type in desired SnapQ name, click Apply to create a new SnapQ and return to the SnapQ Management window.

5. The SnapQ Management window displays with the new SnapQ listed

Add or Remove users for SnapQs

1. Highlight SnapQ, click Edit.

2. Two boxes display, the Users who can access the SnapQ and the Transactions Mapped to the SnapQ. Since it is a new SnapQ, both boxes are empty.
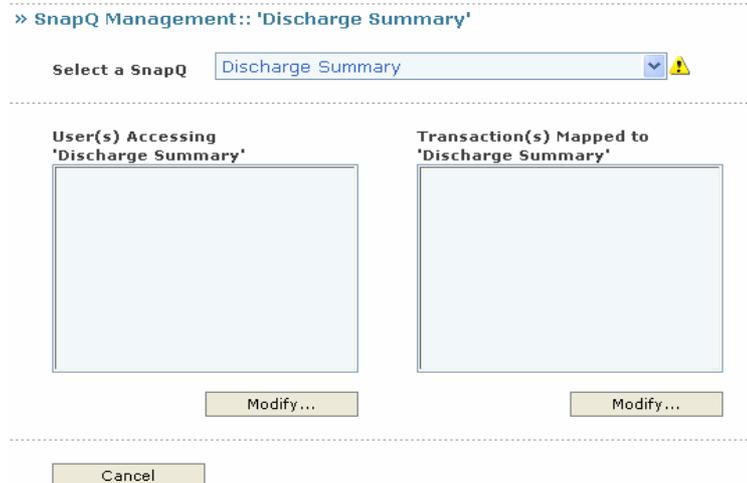

3. Click Modify below the Users box to add users to this SnapQ.

4. A new window displays listing the Organization's active users on the left and a box on the right to display the users who can access this SnapQ.

5. Highlight the desired user on the left, click the add button to move the user to the right. The user can now access the SnapQ. Repeat for as many users as necessary.

Multiple users can be a member of a SnapQ and can also be members of multiple SnapQs.
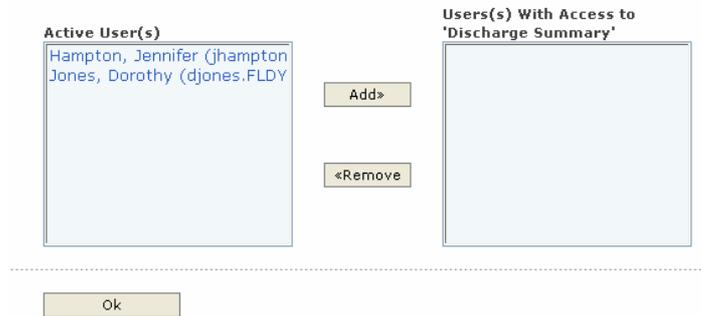

6. To remove a user from accessing the SnapQ, highlight their name in the right box, click the Remove button

7. When complete, click the OK button to return to the SnapQ's Management Screen.

Add or Move Transactions in SnapQs

1. Highlight SnapQ, click Edit.

2. Two boxes display, the Users who can access the SnapQ and the Transactions Mapped to the SnapQ. Since it is a new SnapQ, the Transaction box is empty.

3. Click the Modify button below the Transactions Mapped box on the right of the screen to add the transaction types that will display in this SnapQ
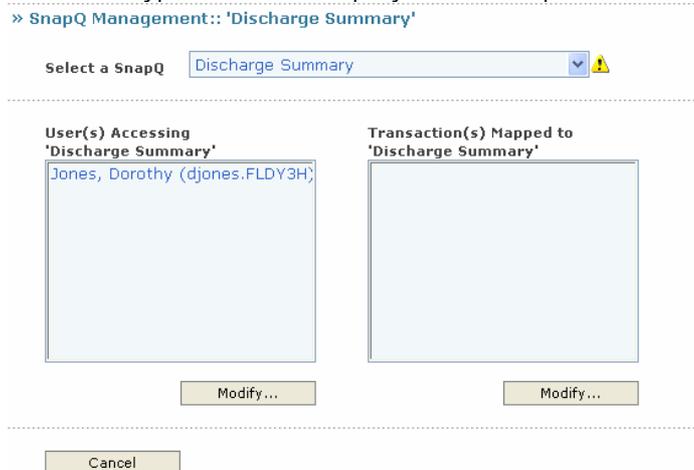
4. Lists of Transaction Types currently in the system are displayed. The header running horizontally lists the SnapQs present. The Transaction types are listed vertically in the left column. Find the transaction type, then follow across until the intersection of the SnapQ is met and click Move Here.

5. A Green Checkmark displays in the box designating that those transactions will be viewable from that SnapQ.

» Transaction – SnapQ Mappings

Tx-Type	Referral	Practice Que	Dr Strong's Q	Discharge Summary	Barb's Q	Robert's Q
Referral	✓	Move Here	Move Here	Move Here	Move Here	Move Here
General Physician's Order	Move Here	✓	Move Here	Move Here	Move Here	Move Here
WCVO / Written Confirmation of Verbal Order	Move Here	Move Here	✓	Move Here	Move Here	Move Here
Change of Status	Move Here	✓	Move Here	Move Here	Move Here	Move Here
Discharge Summary	Move Here	Move Here	Move Here	✓	Move Here	Move Here
Transfer Summary	Move Here	✓	Move Here	Move Here	Move Here	Move Here
Patient's Status Report	Move Here	✓	Move Here	Move Here	Move Here	Move Here
Care Plan - 485	Move Here	✓	Move Here	Move Here	Move Here	Move Here
Care Plan - 486	Move Here	✓	Move Here	Move Here	Move Here	Move Here

6. All transactions must be mapped to a SnapQ. To remove from an existing SnapQ move to another SnapQ.

7. Move the checkmark in the row by clicking the Move Here box located below the appropriate SnapQ. This moves the transaction type from the existing SnapQ to that SnapQ.

8. To save the selections, scroll to the bottom of the screen and click OK.

» Transaction – SnapQ Mappings

Tx-Type	Work Que	Intake Que	Discharge Summary
Referral	Move Here	✓	Move Here
General Physician's Order	Move Here	✓	Move Here
WCVO / Written Confirmation of Verbal Order	Move Here	✓	Move Here
Change of Status	Move Here	✓	Move Here
Discharge Summary	Move Here	Move Here	✓
Transfer Summary	Move Here	✓	Move Here
Patient's Status Report	Move Here	✓	Move Here
Care Plan - 485	✓	Move Here	Move Here
Care Plan - 486	✓	Move Here	Move Here
CMN 484 - Oxygen	✓	Move Here	Move Here
CMN 841 - Hospital Bed	✓	Move Here	Move Here
CMN 842 - Support	✓		

Delegation

Authorize referral delegates for an authorized signor:

A Referral Delegate is an organization that is authorized to initiate referrals on the signor's behalf. For example, authorized referral delegates may be those that often capture verbal or offline written referral instructions from the signor. The delegate must be a member of SnapDragon.

Assign referral delegates:

1. Login to SnapCentral as the Signor.

2. Navigate to Setup, My Setup, Delegate Authorization.

3. The Delegate window opens.

4. Type the first part of the delegate organization's name in the name/keywords field, select the Organization Type from the Org type dropdown and click the Find button.

5. Organizations that match the search, display in the Found Organizations box. Highlight the desired Organization(s) and click the Add to Authorized List button to move the delegate Organization to the Current box.

6. To remove organizations that are no longer delegates, highlight the organization from the box on the right and then click the remove button.

Authorize patient management delegates for an authorized signor:

A Patient Management Delegate (another UPIN/NPI Holder in the Organization) is an individual authorized to view and manage the signor's SnapQ. All activities will be logged and transaction headers will indicate that these parties carried out the transactions "on the Signor's behalf."

To authorize patient management delegates:

1. Login to SnapCentral as the Signor.

2. Click Delegate Auth from My Setup.

3. Type the delegate's last name in the Last Name/Keywords field.

4. Select the specialty from Specialty field, click Find.

5. Highlight the desired delegates from the Found UPIN/NPI Holder box and click the Add to Authorized List button.

6. The assigned patient management delegates display in the Current Authorized Patient Delegate box.

7. To remove an assigned patient delegate, highlight their name in the Current Authorized Patient Delegate box and click the Remove button.

Downloads

The two necessary client components used by SnapDragon are SnapPrinter™ and SnapConsole™.

- SnapPrinter is a Virtual Windows printer that allows you to print attachments and other documents into SnapPacks for movement and delivery through SnapCentral. You may attach practically anything you can print to a SnapPack™

- SnapConsole is a small client that acts as an alert monitor and secure instant messaging platform for near real-time communications with other SnapDragon users

Download and install these on each computer that will be logging into SnapCentral.

The person performing these downloads should have administrative privileges to the computer. This is different than SnapDragon Administrator. If unsure, contact the department or individual that is responsible for the computers.

The Download section is available in Organization Setup and My Setup, so it can be accessed by any user that is logged into SnapCentral.

Install SnapConsole:

1. Navigate to Setup, My Setup, Download or if logged in as an administrator, navigate to Setup, Organization Setup, Download.

2. Click the Download SnapConsole link and click the Save button when prompted. Save is the recommended option at this point, for running directly from this screen takes longer to process. It is faster to save and then run locally.

3. The resulting Save As screen places the SnapConsole_Setup.exe in a folder on your computer. Make note of the location, it will be used in the next step. Click the Save button.

4. If the resulting window has an option to Run, click that; otherwise navigate to the folder where the file was saved and Double-click on the SnapConsole_Setup.exe and click Run.

5. When the Install program starts, follow the prompts to install SnapConsole. You will be notified when complete.

6. Once installed, SnapConsole is an Alert and Instant Messaging program for SnapDragon members that will load automatically to the login screen when the computer is started. The login information is the same User ID and Password that is used to login to SnapCentral.

7. In order for SnapPrinter to work, the user must be logged into SnapConsole.

Install SnapPrinter:

1. SnapPrinter is installed concurrently with SnapConsole with no additional installation wizards.

2. Once installed, SnapPrinter is a Virtual Windows Printer that is listed with the other Windows printers and called SnapPrinter-Attachment. Its purpose is to move the item from the original program to the User's Print Fax Q for use as an attachment to a SnapPack.

3. In order for SnapPrinter to send the document to the Print Fax Q, the user must be logged in to SnapConsole. If not logged in, windows will display the message that the item failed to print.