

Backline Training Manual

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Creating your Backline Account

Before you log in, you will need to register your account through an invitation email.

Standard Backline Account

1. Once that the Hello Health Support Team has created your Backline account, you will receive an email with a link to register the account
 - a. The registration link expires in 21 days
 - b. If the link expires, please contact your administrator to have the invitation resent

Greetings Gregory House,

Your organization, Demo Organization, has implemented Akario BacklineSM, a secure collaboration and communication tool from DrFirstTM. We are excited that you will be using Akario Backline with your colleagues at Demo Organization in order to improve clinical communication, collaboration and productivity, all while protecting patient health information (PHI).

[Click here to complete your registration](#)

If the link above does not work, please copy and paste this URL into a browser: <http://bl.akar.io/dhk4E>

Your unique account link will expire in 21 days, so make sure to complete your registration soon!

Once you have completed your registration, you can:

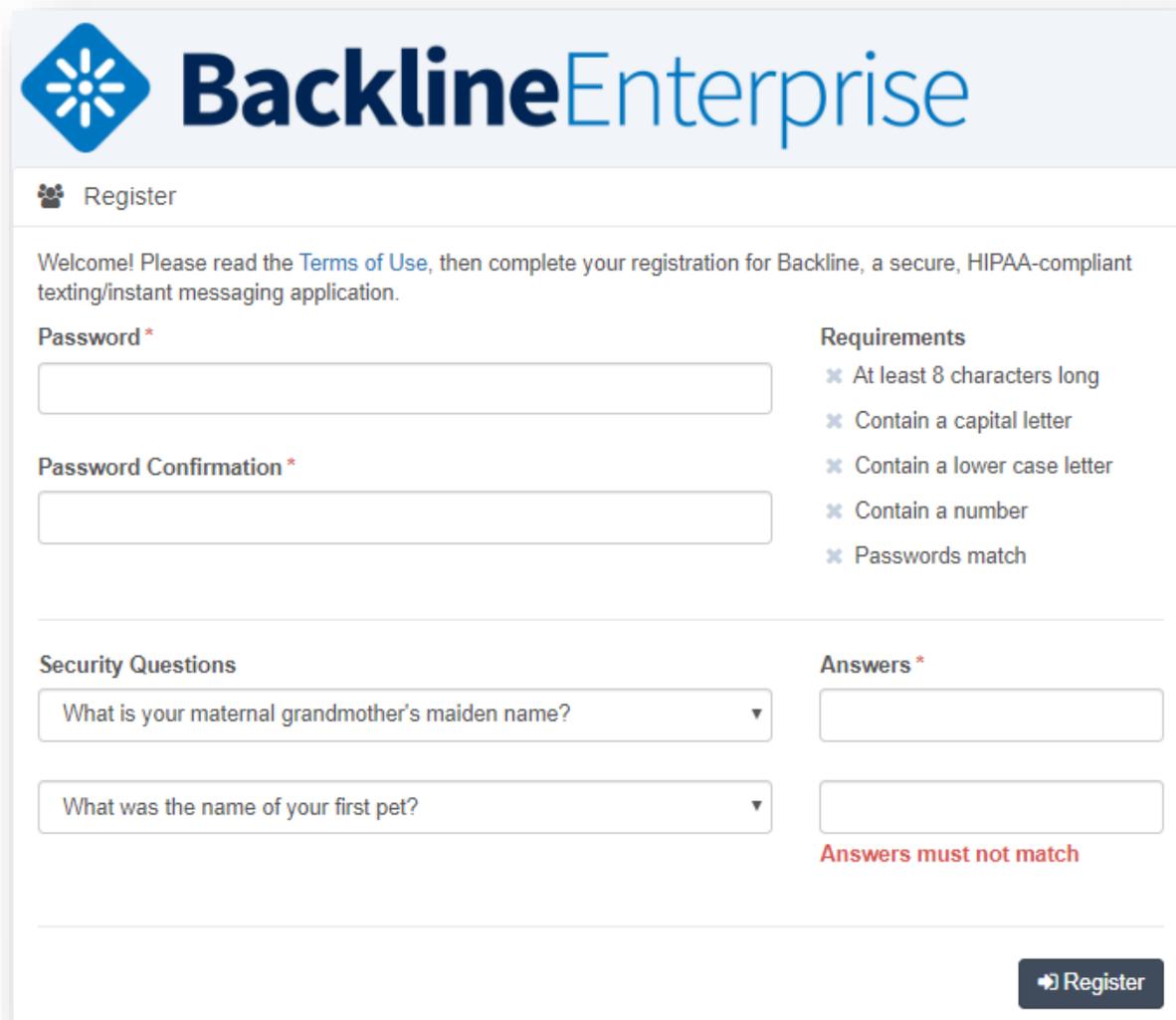
Log in to Akario Backline on the web at <https://backline.akariobl.com>. Make sure to bookmark this link!
Download Akario Backline mobile from the iTunes or Google Play stores.

Thanks!

The Akario Backline Team

www.getakario.com

2. The link will take you to the Backline registration screen to create a password, answer security questions, and accept the **Terms of Use** before proceeding
 - a. To view the **Terms of Use**, click on **Terms of Use** and another window will open to display them for you to review

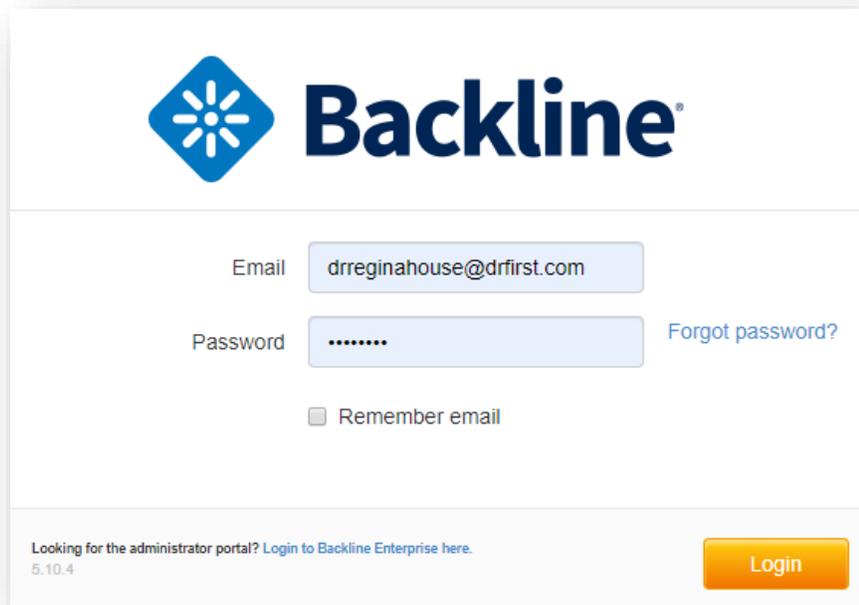


The screenshot shows the Backline Enterprise registration interface. At the top left is the Backline logo, a blue diamond with a white starburst. To its right is the text "BacklineEnterprise" in a blue sans-serif font. Below the logo is a "Register" button with a paw print icon. A welcome message reads: "Welcome! Please read the [Terms of Use](#), then complete your registration for Backline, a secure, HIPAA-compliant texting/instant messaging application." The registration form is divided into two main sections. The first section is for password creation, with a "Password*" field and a "Password Confirmation*" field. To the right of these fields is a "Requirements" list: "At least 8 characters long", "Contain a capital letter", "Contain a lower case letter", "Contain a number", and "Passwords match". The second section is for security questions, with two dropdown menus. The first dropdown is "What is your maternal grandmother's maiden name?" and the second is "What was the name of your first pet?". To the right of these are two "Answers*" input fields. Below the second answer field is a red warning: "Answers must not match". At the bottom right of the form is a dark blue "Register" button with a right-pointing arrow.

3. Once you complete the registration, you will be able to log in and begin using Backline
 - a. The web address to access Backline is <https://backline.akariobl.com>
 - b. For future reference, it is best to bookmark this website

4. Navigate to the login screen to input your login email address and password

PLEASE NOTE: After more than five unsuccessful login attempts, your account will be locked for 15 minutes and you will receive a notification email.



The screenshot shows the Backline login interface. At the top left is the Backline logo, a blue diamond with a white starburst pattern, followed by the word "Backline" in a bold, dark blue font. Below the logo is a horizontal line. Underneath the line are two input fields: "Email" with the text "drreginahouse@drfirst.com" and "Password" with a masked password of seven dots. To the right of the password field is a link that says "Forgot password?". Below the password field is a checkbox labeled "Remember email". At the bottom left, there is a small text link: "Looking for the administrator portal? Login to Backline Enterprise here." with the version number "5.10.4" below it. At the bottom right is a prominent orange "Login" button.

Optimizing Backline Access

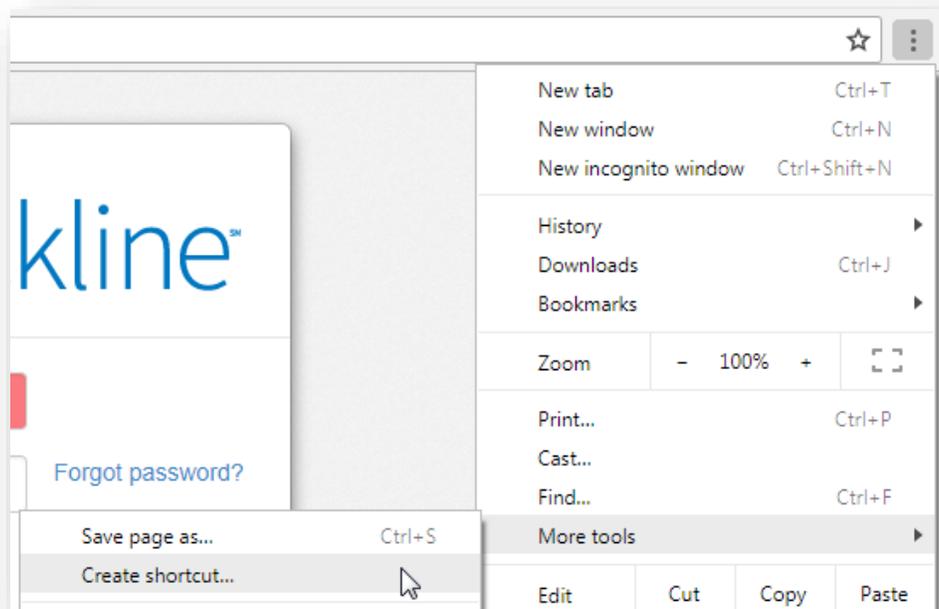
Please see the sections below to make sure that you have the best setup to access Backline in the future.

Browser Setup

Our recommended web browser is **Google Chrome**. For easier access to Backline in the future, you can use the star icon to bookmark the site.

You can also follow the steps below to save a Chrome shortcut to your desktop.

1. Once on the login screen, click on the dots in the top corner of the toolbar
2. Hover over **More Tools**, and select **Create Shortcut**



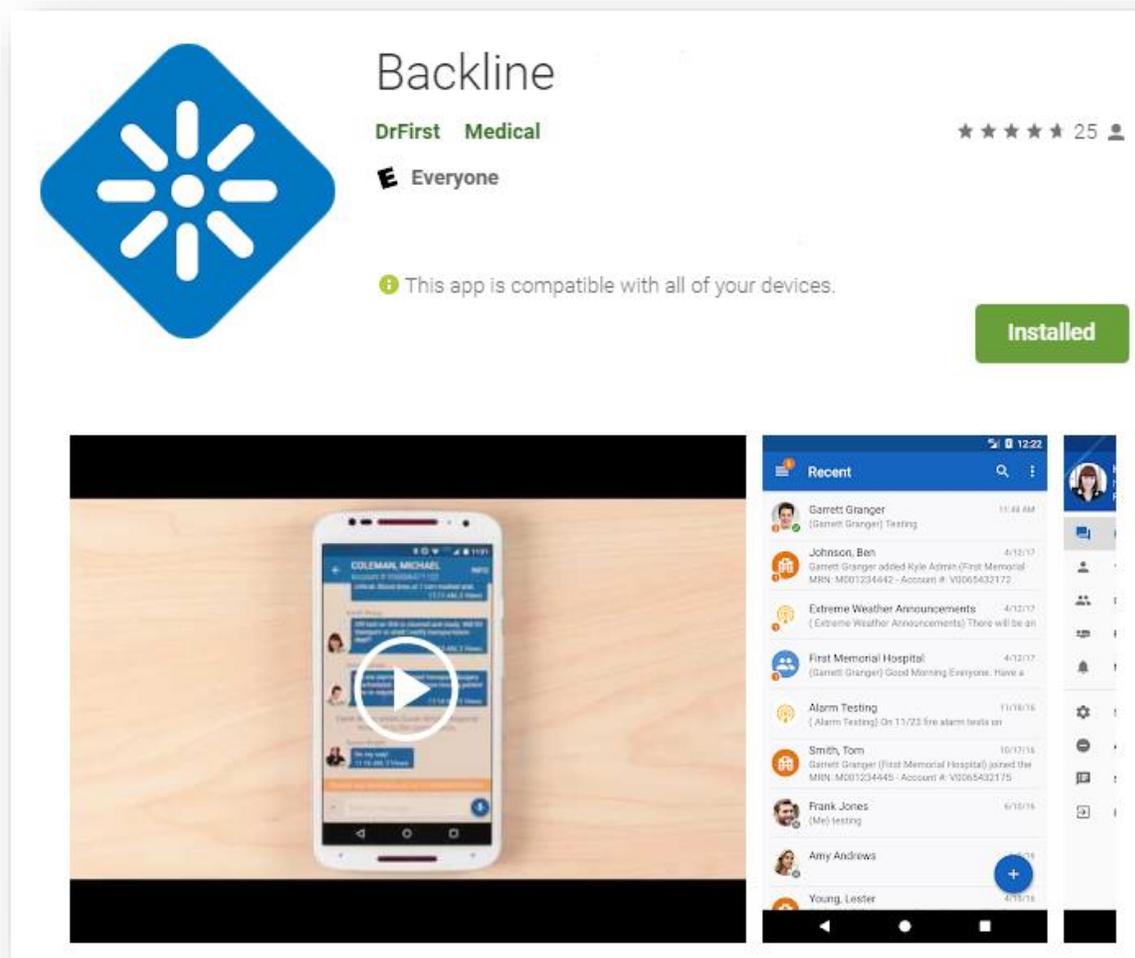
3. Rename the shortcut to Backline



Mobile Access

If your organization allows, you can use a mobile device to access Backline. You can install the Backline mobile app by navigating to the iOS or Android app store.

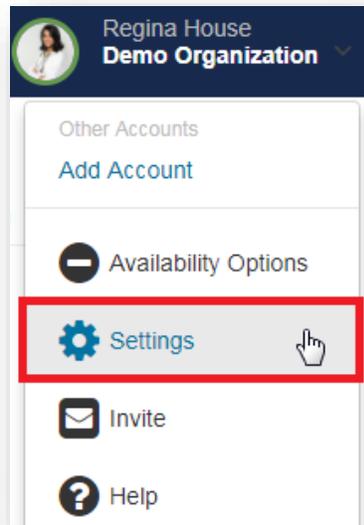
Once installed, you can use the same login for the mobile app as well. Most functions will be similar across both applications, but you can access our mobile-specific training materials for more information.



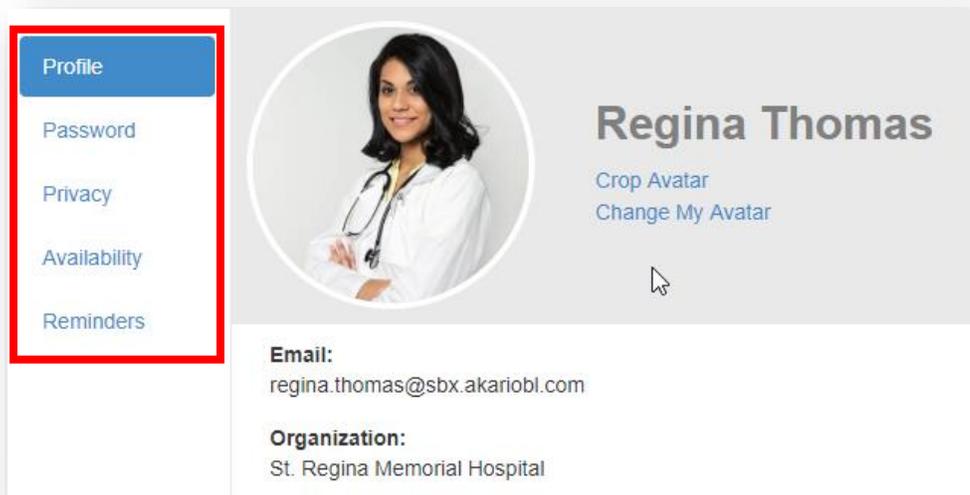
User Settings

It is important to review your settings when logging in for the first time to ensure that your personal account settings are configured to your preference.

1. At the top right of the screen, you can click on the arrow to open up the **Settings** menu, which allows you to set various options for your Backline account



2. Within **Settings**, there are a number of sections that allow you to modify your profile settings. These setting options are explained in the following sub-sections of this manual



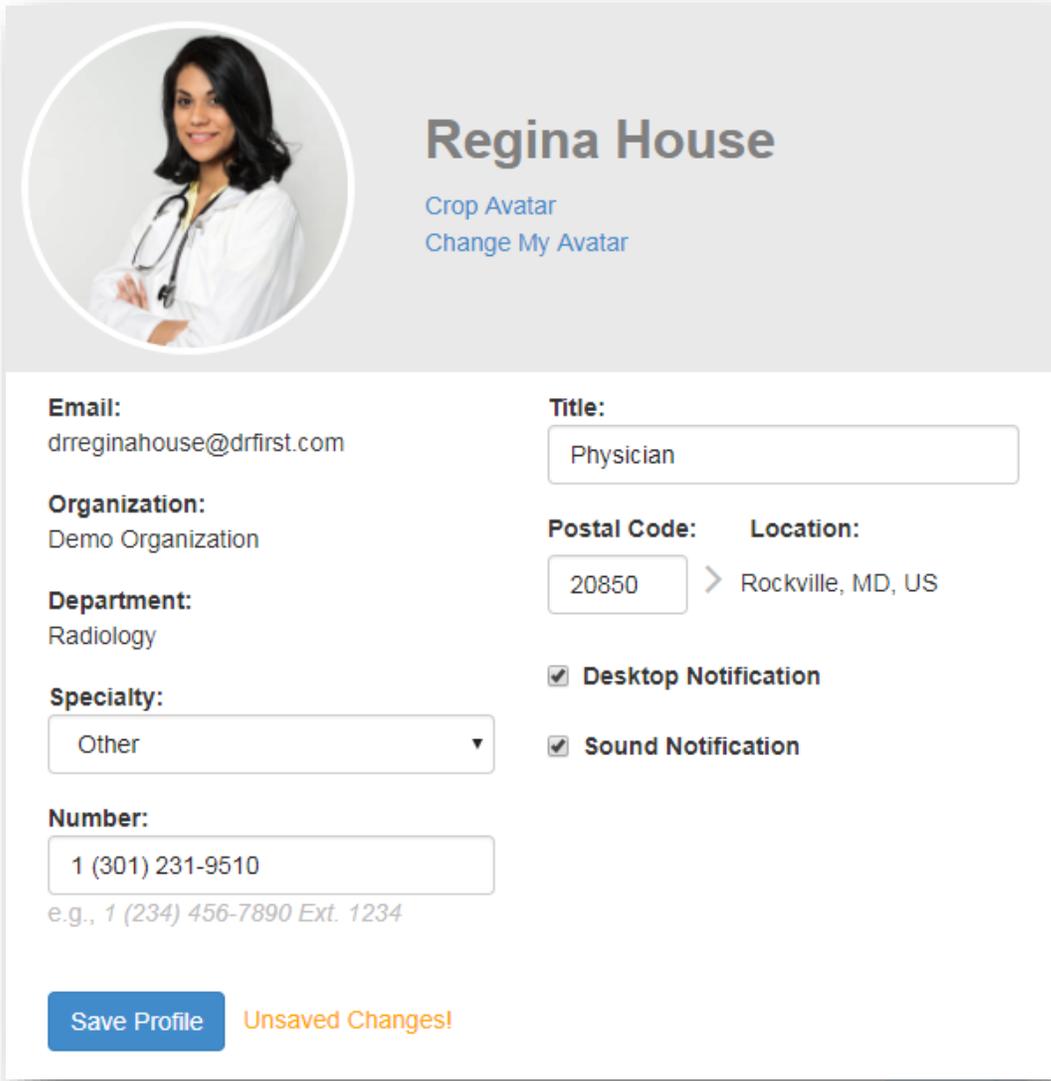
Profile

You can update your **Specialty, Phone Number, Title** and **Postal Code** through the **Profile** settings.

You can also choose to receive desktop notifications and sound notifications. Desktop notifications work with **Google Chrome** and **Firefox** browsers but not **Internet Explorer**.

You can also upload a photo to use as an avatar, which will appear next to your name in chat sessions.

Once you have updated your profile information as needed, click the **Save Profile** button at the bottom of the page to apply the changes.



 **Regina House**
[Crop Avatar](#)
[Change My Avatar](#)

Email:
drreginahouse@drfirst.com

Organization:
Demo Organization

Department:
Radiology

Specialty:
Other ▼

Number:
1 (301) 231-9510
e.g., 1 (234) 456-7890 Ext. 1234

Title:
Physician

Postal Code: 20850 **Location:** > Rockville, MD, US

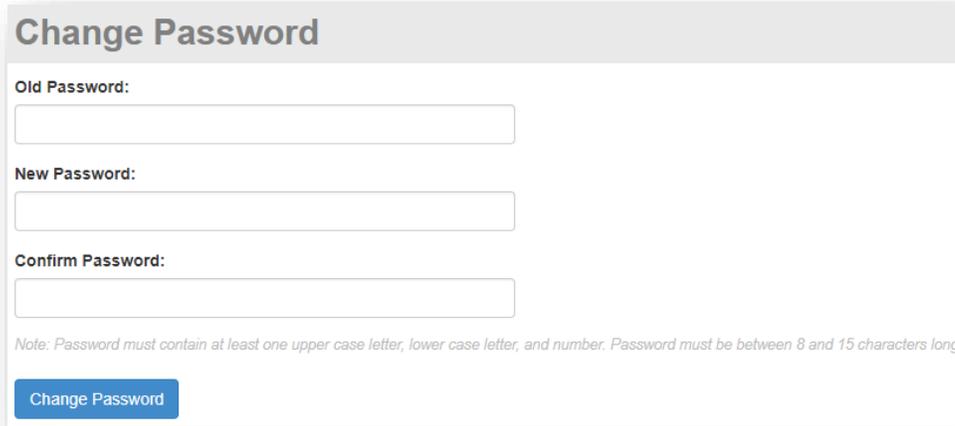
Desktop Notification

Sound Notification

[Save Profile](#) **Unsaved Changes!**

Password

You have the ability to change your password from **Settings** as well (non-LDAP users only). The password must be between 8 and 15 characters long and contain at least one uppercase letter, one lowercase letter and one number.



Change Password

Old Password:

New Password:

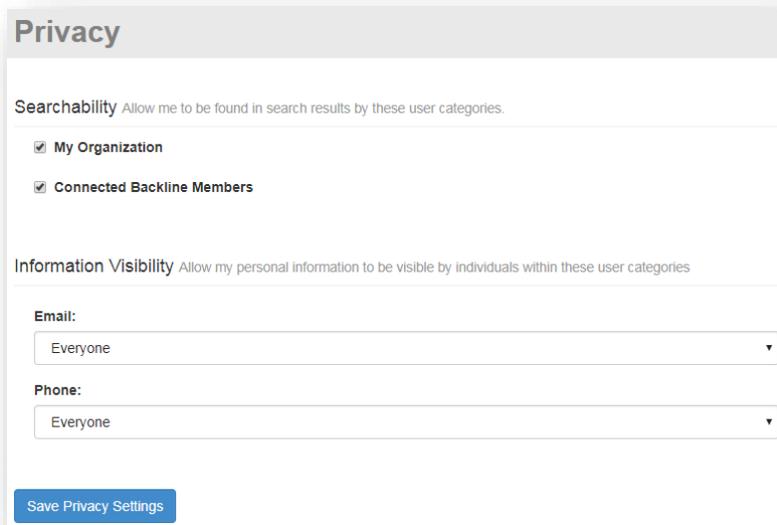
Confirm Password:

Note: Password must contain at least one upper case letter, lower case letter, and number. Password must be between 8 and 15 characters long.

[Change Password](#)

Privacy

You can set your searchability by members of your organization only or all members of the organizations that your organization has connected to. You can also modify who has the ability to view your email address and phone number.



Privacy

Searchability Allow me to be found in search results by these user categories.

- My Organization
- Connected Backline Members

Information Visibility Allow my personal information to be visible by individuals within these user categories

Email:

Phone:

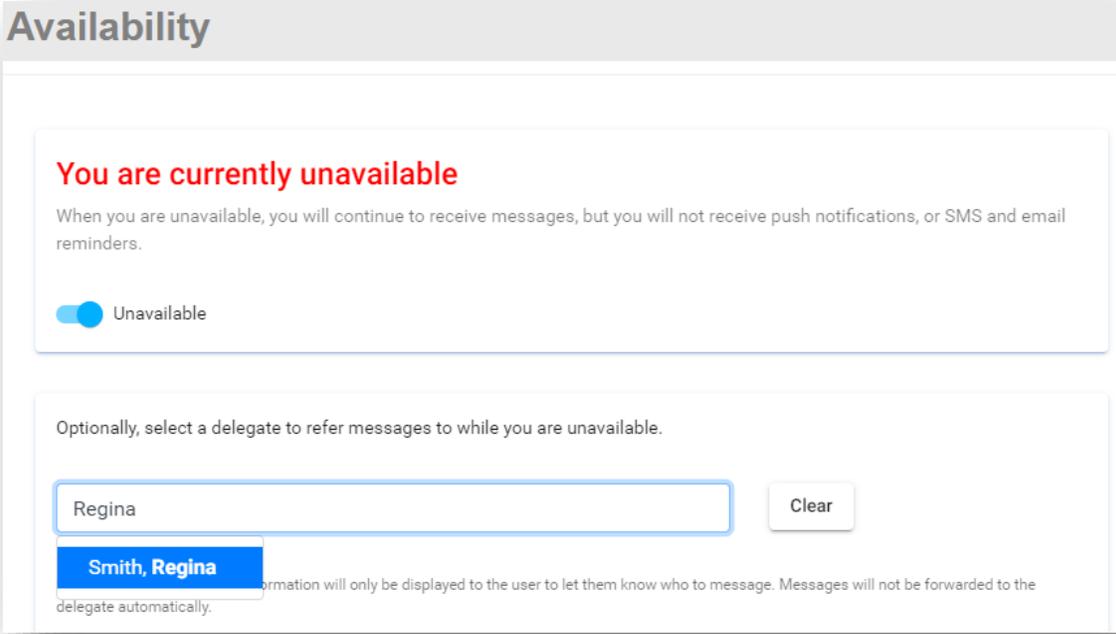
[Save Privacy Settings](#)

Availability

You can set your availability within Backline. By toggling **Unavailable**, you will continue to receive messages but will not receive push notifications or SMS/email reminders.

If there is more than one license assigned to your practice, you can:

Search for a delegate, which other users will be told to contact when you are unavailable. Messages received while you are Unavailable will not be automatically forwarded to the delegate.



Availability

You are currently unavailable

When you are unavailable, you will continue to receive messages, but you will not receive push notifications, or SMS and email reminders.

Unavailable

Optionally, select a delegate to refer messages to while you are unavailable.

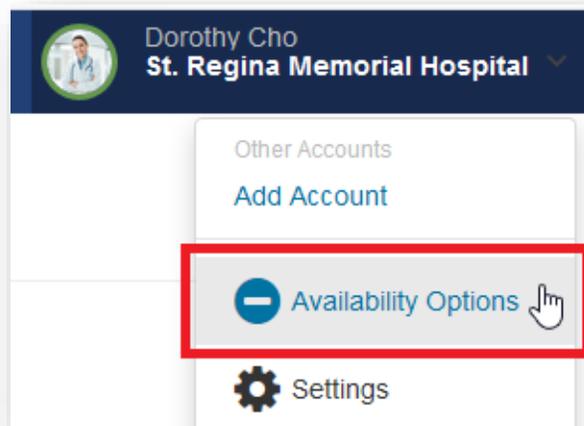
Regina

Clear

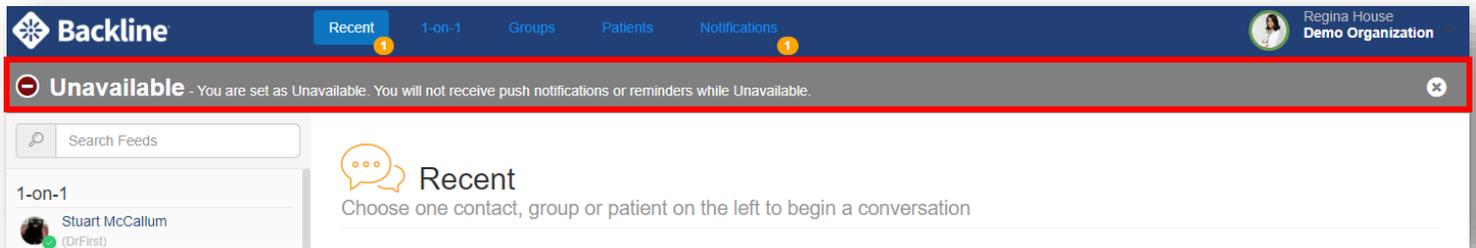
Smith, Regina

Information will only be displayed to the user to let them know who to message. Messages will not be forwarded to the delegate automatically.

You can also use the drop-down menu from your name in the far upper right side of the screen to select the **Availability Options** setting.

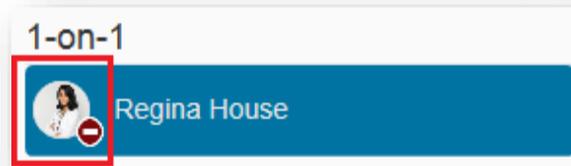


After you set yourself as Unavailable, you will see a gray banner on the top of all Backline screens stating that you are Unavailable. This banner allows you to change your status back to Available by clicking the “x.”

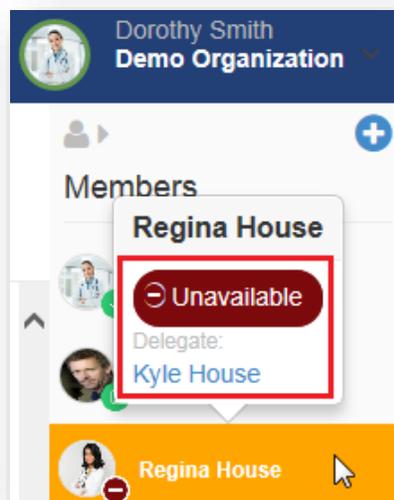


Other unavailable users will display as listed below:

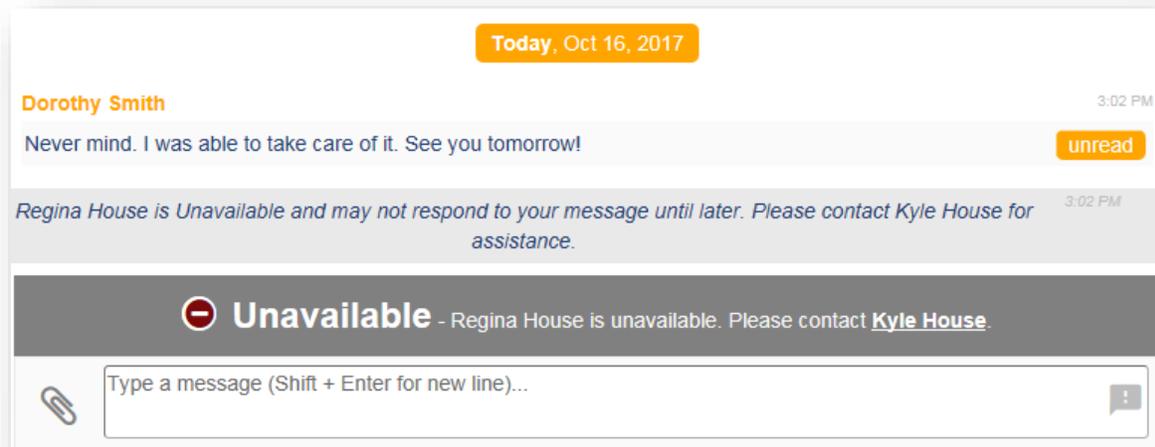
- A red circle with a white line through the middle is displayed next to a user’s name



- In a group chat, you can hover over the names of other group members to display an informational pop-up. When a user is set as Unavailable, the system will display the user as **Unavailable** and will display a delegate if one has been appointed.



- In addition to the red circle on the avatar, a gray bar will display at the bottom of a chat screen in 1-on-1 chats to indicate that the user is Unavailable
 - A delegate will be displayed if one has been assigned. Clicking the delegate's name in the gray bar will launch a 1-on-1 chat with the delegate.



- Users may still send messages to Unavailable users. An autoreply will trigger within the chat stating that the user is Unavailable and providing the delegate's name if one has been appointed.
 - The Unavailable user will not receive push or audible notifications but will receive unread message badges

Reminders

You can modify **Configurations** for **SMS Reminders**, **Email Reminders**, and **Urgent Message Reminders**.

1. **SMS Reminders:** You are able to determine when you would like to receive an SMS reminder if a message has not been read within a period of time
 - a. The settings range from never up to two days
 - b. You will only receive one reminder during the defined period of time, even if you receive more than one message
 - c. The number of times a reminder will repeat itself is customizable
2. **Email Reminders:** You are able to determine when you would like to receive an email reminder if a message has not been read within a period of time

- a. The settings range from never up to two days
 - b. You will only receive one reminder during the defined period of time, even if you receive more than one message
 - c. The number of times a reminder will repeat itself is customizable
3. **Urgent Message Reminders:** You are able to determine when you would like to receive an SMS reminder if an urgent message has not been read within a period of time
- a. The settings range from never up to 4 minutes
 - b. You will only receive one reminder during the defined period of time, even if you receive more than one message
 - c. The number of times a reminder will repeat itself is customizable

Reminders

SMS Reminders

Send me a reminder if a message has not been read:

Within

15 min



The number of times an SMS reminder is repeated:

Repeats

Twice



Email Reminders

Send me a reminder if a message has not been read:

Within

15 min



The number of times an e-mail reminder is repeated:

Repeat

Twice



Urgent Message Reminders

Send me a reminder if an urgent message has not been read:

Within

30 seconds



The number of times an urgent alert is repeated:

Repeat

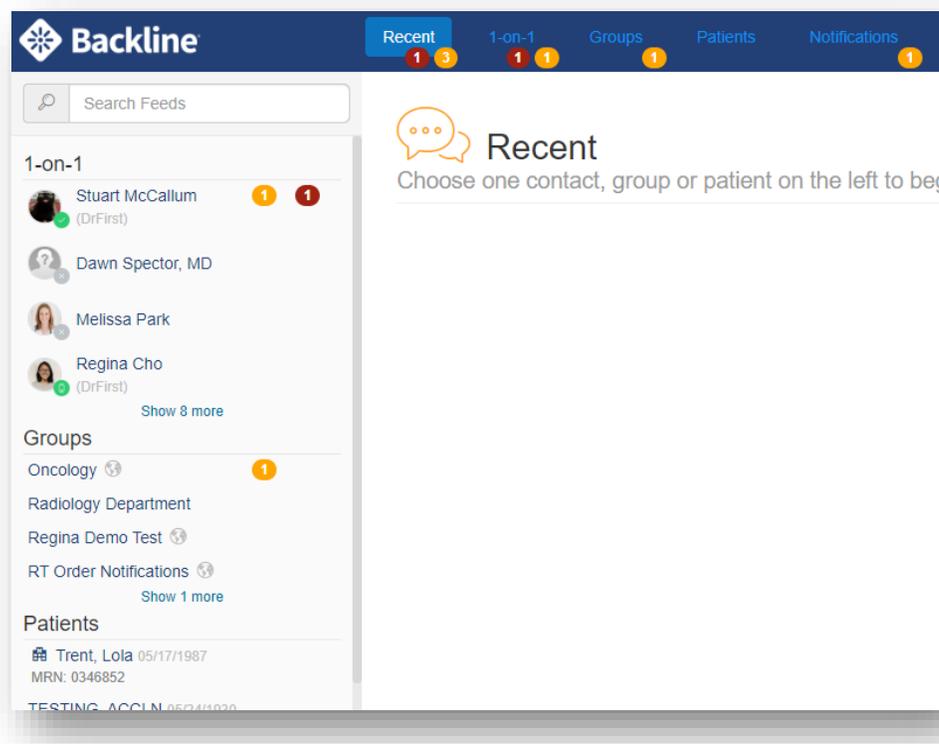
Once



Chat Type Overview

Once logged into Backline, you will see five tabs within the top toolbar. The next few sections will outline how to chat within Backline, but please see the listed sections below for more details on how to manage each chat type.

- **Recent:** Shows any recent chats
- **1-on-1:** Access 1-on-1 chats. See [1-on-1 Chats](#) section for specific details.
- **Groups:** Access group chats. See Managing Groups section for specific details.
Option is applicable when more than one license is available for your practice.
- **Patients:** Access Patient Centered Chats. See Managing Patient Centered Chats [PCC] section for specific details. *Option is applicable when more than one license is available for your practice.*
- **Notifications:** Shows any notifications (Notifications of Undeliverable Prescriptions, broadcast messages, event notifications). See [Notifications](#) section for specific details.



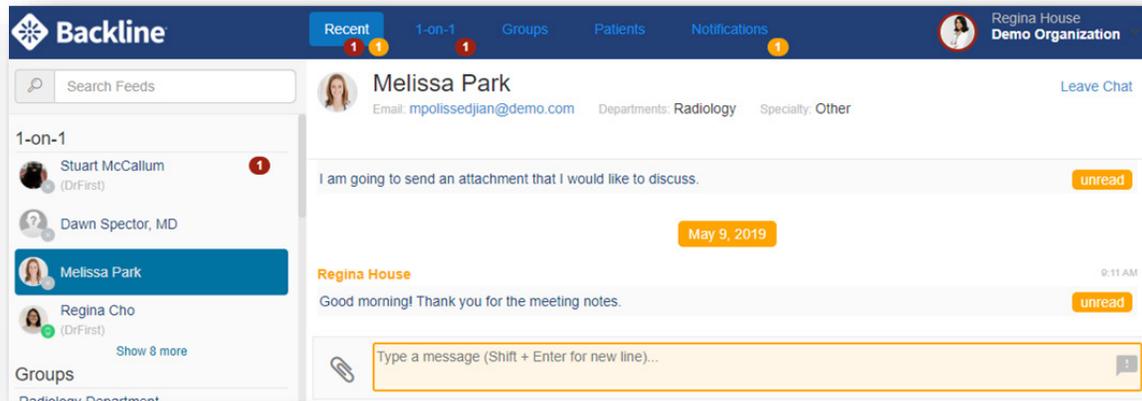
You will see an orange badge notification with the number of unread messages within each chat type. A red badge notification will appear with a numerical value indicating the number of urgent messages awaiting acknowledgment will also display within each chat type, if applicable.

You can use the **Search Feeds** search bar in the upper left to narrow down the results displayed.

Sending Messages

You can send secure messages to users who are online, unavailable or offline. Offline users will see new badge notifications when they log back into Backline. Unavailable users will get a message, but no notifications will disturb them.

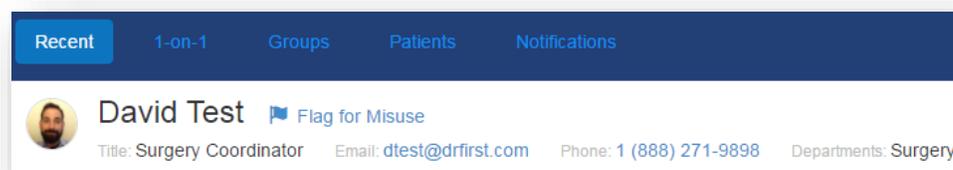
To send a message, click on the name of a contact, group, or patient. Use the search field to filter results. Type a message into the box at the bottom of the screen and hit enter to send a message.



While sending messages, there are other tools and features accessible as well.

Contact Information

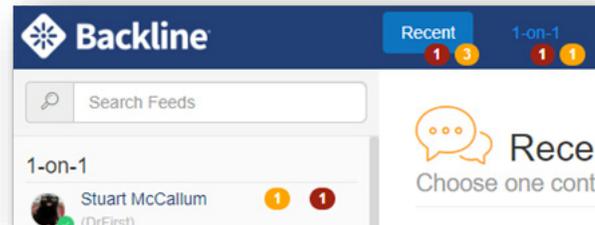
Within a 1-on-1 chat, you can view a contact's name at the top of the chat. Additional information provided includes title, department and specialty, as well as their email address and phone number (if the user has chosen to share that information).



You can click on a contact's email address to open an email to compose or click on the phone number to launch an application on your computer to make a phone call. Email and phone calls will open outside of Backline if your computer is equipped to perform these actions.

Message Notifications

You will receive an orange, numeric badge notification next to a contact's name letting you know there is an unread message from the contact. You will receive a red, numeric badge notification next to a contact's name letting you know there is an urgent message awaiting acknowledgment. The numerical badge notifications will also display in the toolbar under the appropriate section.



You can view previous chat history including any messages you received while offline.

If desktop notifications have been enabled, you will receive a desktop notification in the bottom right corner of the screen in Google Chrome or Microsoft Edge. If sound notifications have been enabled, you will hear an alert sound in Google Chrome, Safari Firefox or Internet Explorer.

Read Receipts

You have the ability to see if a message is unread, or if it has been read by the recipient. If the message is unread, you will see an orange **unread** badge.

If the message has been read, you will see the time it was sent. If you hover over the message sent, it will display that it was read and will show the date and time stamp.

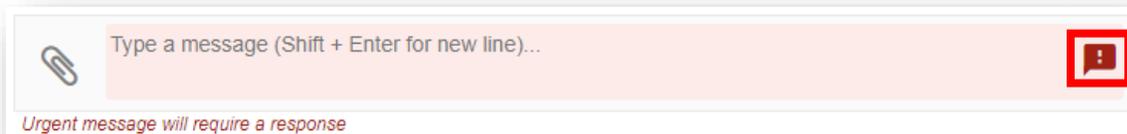
Once you have read a received message, it will display that it was read and will show the date and time stamp.



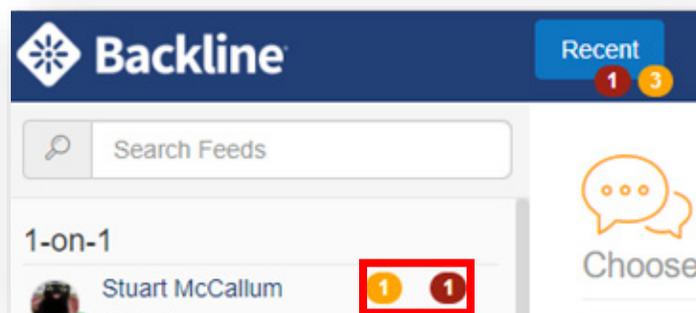
Urgent Messages

You can mark messages as urgent within Backline by clicking on the red exclamation bubble. Urgent messages will be marked as such and will prompt for acknowledgement from the recipient.

Once you mark a message as urgent, red highlighting will be applied to the text box. A warning will appear below the text box as well. After typing the urgent message into the text box, you can tap Enter on the keyboard as usual to send the message.

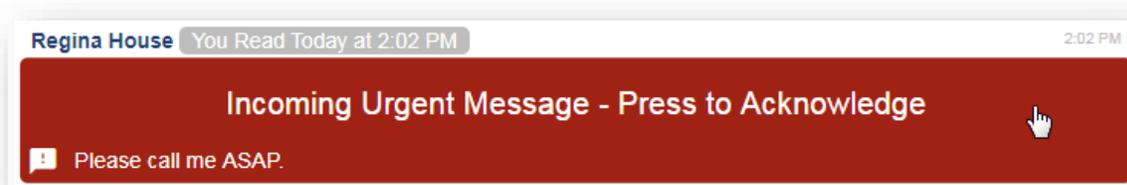


If you receive an urgent message, you will see an orange and a red badge notification with a number for the same message.

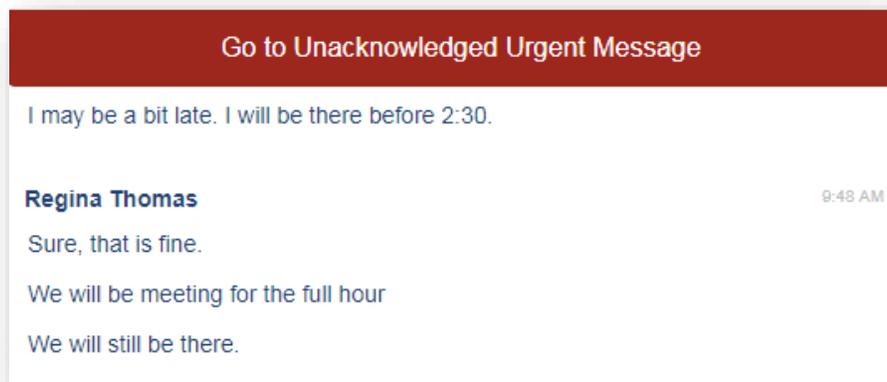


Once the message is opened, it will be marked as read, and the orange badge will disappear. The red badge will disappear once the recipient **acknowledges** the urgent message.

For the recipient to **acknowledge** the message, they will need to click on the red urgent banner.



If the urgent message was sent a number of messages ago, there will be a shortcut banner that can be clicked on at the top of the screen to navigate to the urgent banner.

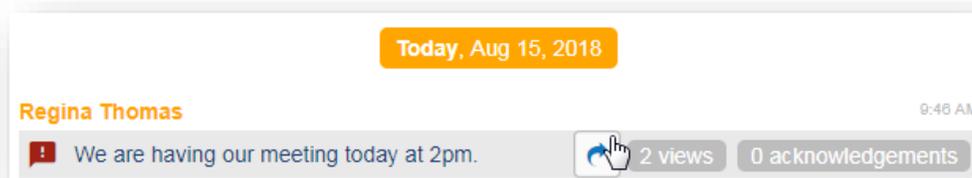


Once the recipient has read and acknowledged the urgent message, the red exclamation point will turn into a blue check mark. The message will say it has been read and acknowledged with the appropriate time stamps.

Forwarding a Message

Backline allows you to forward any messages sent to you and any messages that you have sent to a different user or group, as long as you have had a previous chat with the user or group.

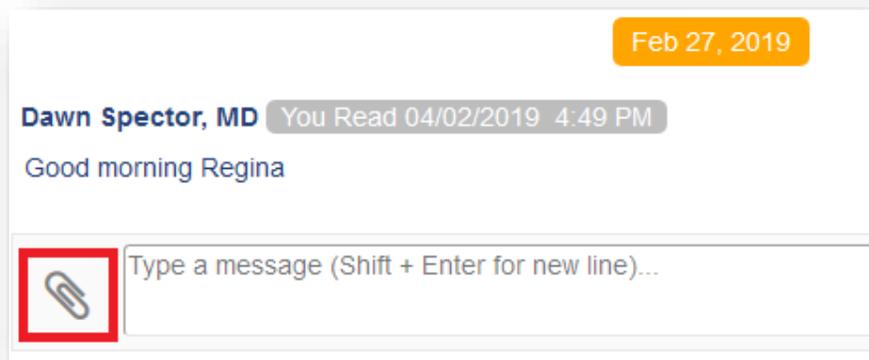
1. Hover over the message that you wish to forward. A forwarding arrow will display when you view the message.
 - a. An urgent message may not be forwarded until it has been acknowledged



2. Select a user or group to forward the message to
3. You will see a confirmation at the top of your screen once you click on the user or group name. When the recipient views the forwarded message, a read receipt will display.

Attachments

Backline allows you to send secure attachments by clicking on the paperclip icon that appears in the chat window. You can send files up to 20MB in size.



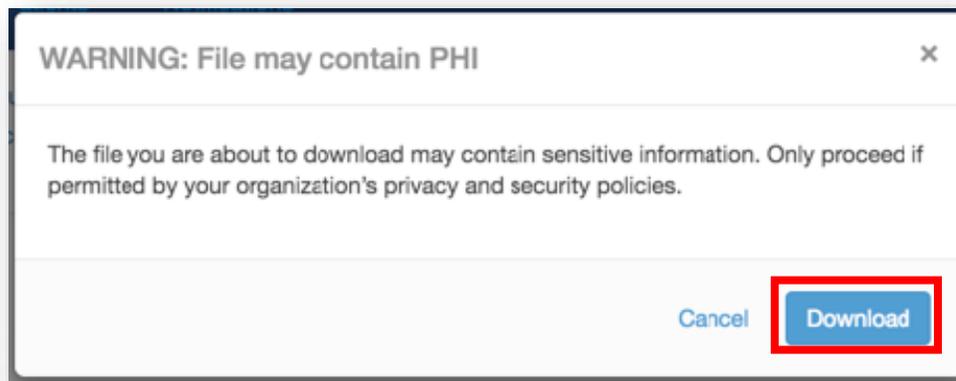
After you click the paperclip, this will open your computer's file viewer to select a file to send.

When viewing attachments uploaded through Backline, you will have two options for viewing/playing PDF, video and audio attachments:

- Clicking the left icon will open the PDF or video in an inline viewer for secure viewing
- Clicking the right icon will allow you to download the file after accepting the warning prompt



Images will open securely in an inline viewer, and you will receive the warning prompt before downloading from the viewer.



You will not have an option to view Word, Excel and Text files in an inline viewer. To view these files, you can download them after clicking **Download** and accepting the warning prompt.

Leaving a Chat

If you no longer want to chat with a contact, you can click **Leave Chat** in the top right. The chat will be removed from **1-on-1** and **Recent** chats. If you later decide to add the contact back to your contact list, the chat history will reappear from before the removal.



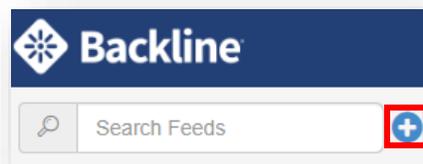
You will also see this same option for other chats you are a part of, such as group chats. Some chats you will not be able to rejoin unless re-invited. For example, if you leave a private group chat that you are part of, you will need to be invited once more.

Managing 1-on-1 Chats

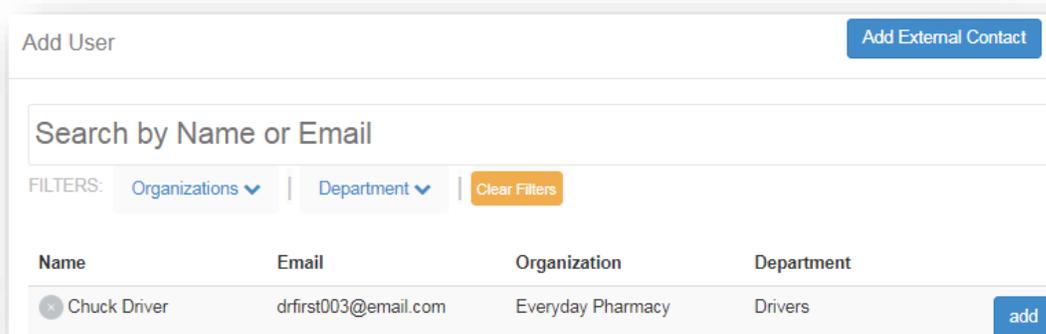
This chat will take place with you and one other individual. You can easily access 1-on-1 chats you are already a part of, but you must first add them to your feed.

Adding a Member of Your Organization or Connected to Your Organization

1. Click on **1-on-1** in the toolbar
2. Next, click the **+** button next to the right of the search field



3. When searching for an existing Backline contact, you can filter by name (first name, last name, or first few letters), email address, Organization or Department. You can view if a contact is online, idle, offline or unavailable based on the icon by their name.
 - a. : online either on the web or their mobile device
 - b. : idle
 - c. : offline
 - d. : unavailable
 - e. : registered with no read messages

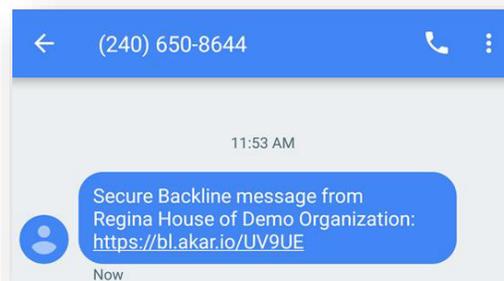
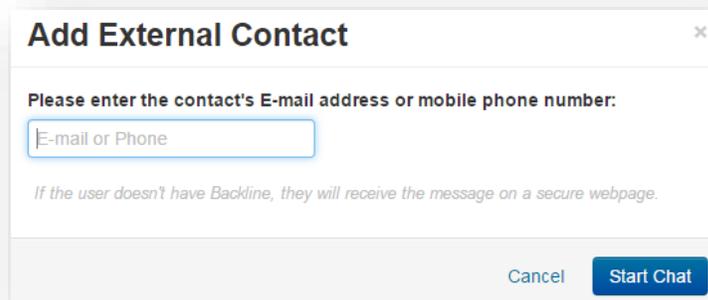


4. Click on **Add** to begin a chat with a new user. This will take you directly into the chat.
 - a. If you see **View** next to a contact, it means you have already added this user to your list. Clicking **View** will take you into your existing conversation.

Adding an Individual Outside of Your Organization

You have the ability to connect and chat 1-on-1 with users outside of your organization, as long as your organization permits this.

1. On the **Add User** screen, you will see registered users in your organization, as well as users belonging to organizations with which your organization is connected
2. If the contact with whom you would like to securely communicate with is not available in the Add User search screen, you can click on the **Add External Contact** button. You will be asked to input their email address or mobile phone number.
 - a. If the contact is using Backline at another organization and their organization is connected with your organization, they will receive the message via Backline
 - b. If the contact has not registered for Backline, they will receive a notification via SMS or email and be brought to a secure chat webpage. They can send and receive 1-on-1 messages, including documents (web) or photo attachments (mobile), with you for a limited time through without having to download the Backline application.



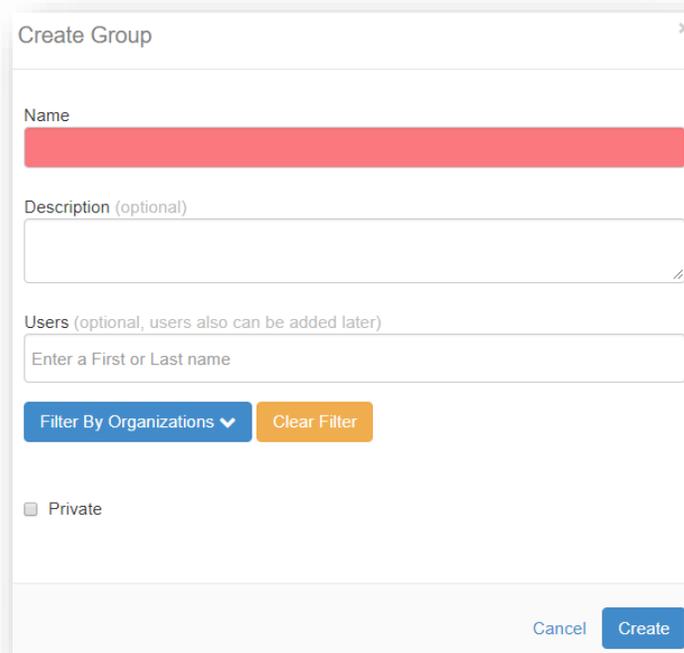
3. If the user is a member of another connected Backline organization, their organization name will appear below their name to identify them as an external contact; otherwise (External) will appear.

Managing Group Chats

Groups can be created to form a discussion with multiple contacts. This includes contacts outside of your organization, if this is allowed by your organization.

Creating a Group Chat

1. Select **Groups** from the top toolbar
2. Click the **+** button to the right of the search field
3. Click on the **Create New Group** button
4. Next, complete the fields for the new group
 - a. **Name:** Required to enter the group name
 - b. **Description:** Optional descriptor for the group's purpose
 - c. **Users:** Search directly or filter by Organization. This is also optional at this time, as users can be added later.
 - d. **Private** checkbox: Can be marked as non-searchable, private chats. A group with this checked off will be invite-only by users already in the chat.
5. Click the **Create** button to start the group chat

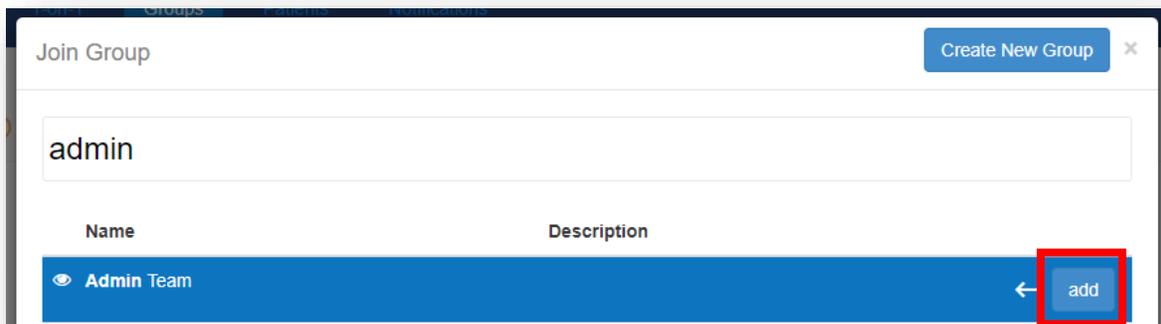


The screenshot shows a 'Create Group' dialog box with the following fields and controls:

- Name:** A text input field with a red error bar below it.
- Description (optional):** A text area for an optional description.
- Users (optional, users also can be added later):** A text input field with the placeholder text 'Enter a First or Last name'.
- Filter By Organizations:** A blue button with a dropdown arrow.
- Clear Filter:** An orange button.
- Private:** A checkbox that is currently unchecked.
- Cancel:** A light blue button.
- Create:** A blue button.

Search Group Chats to Join

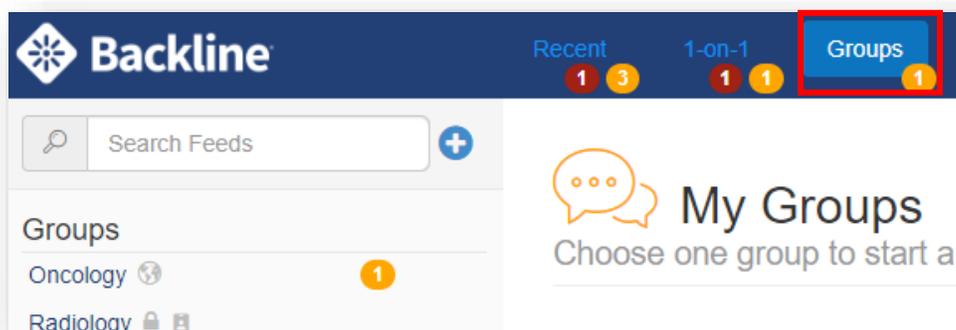
1. Select **Groups** from the top toolbar
2. Click the **+** button to the right of the search field
3. Below **Join Group**, enter the name or description of the group into the search field
 - a. You can click on the eye icon to view current members and if they are online
4. Click **Add** to the right of the chat that you wish to join
 - a. If you are already a part of the chat, you can click **View** to open the chat



Group Chat Functions

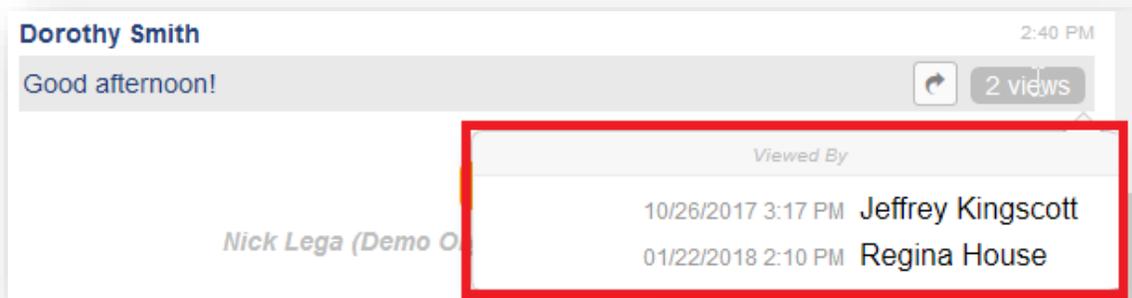
In a group, all members can view your messages. When you join, leave, or add new members, a notification will appear in the chat. Group members can perform the functions below:

- View all current group chats by clicking **Groups** in the top toolbar and viewing the left navigation pane

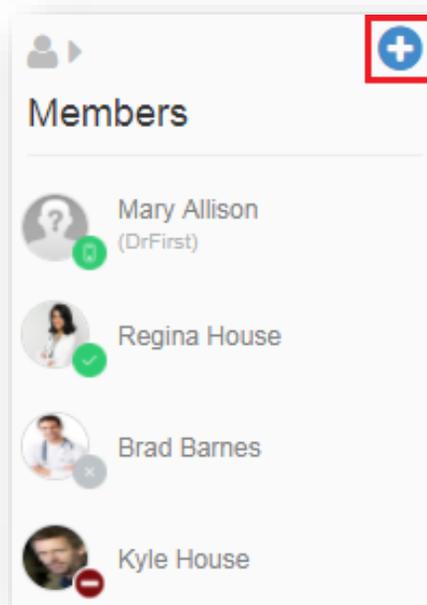


- Any member of a group can modify the name or topic of the discussion group

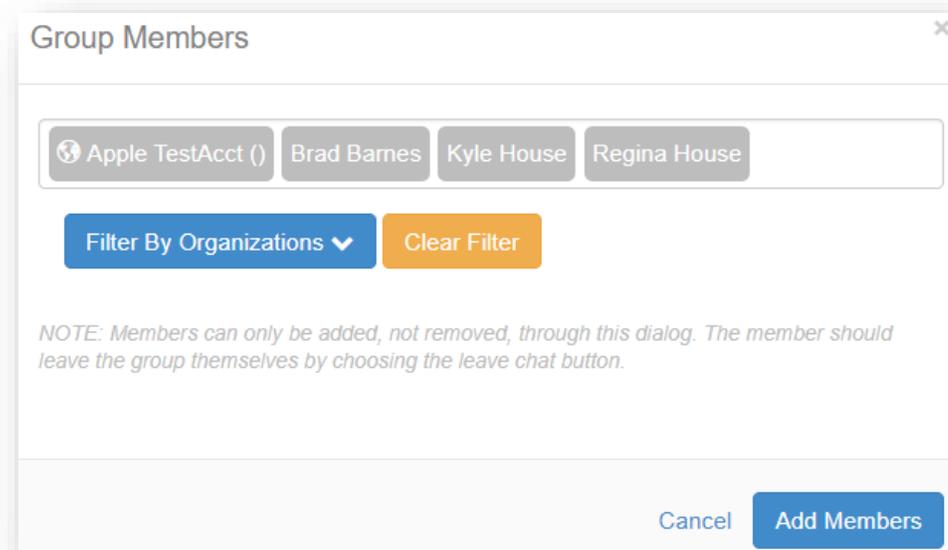
- You can hover over the viewed message count to display **Viewed by** with a list of names and date/time stamps



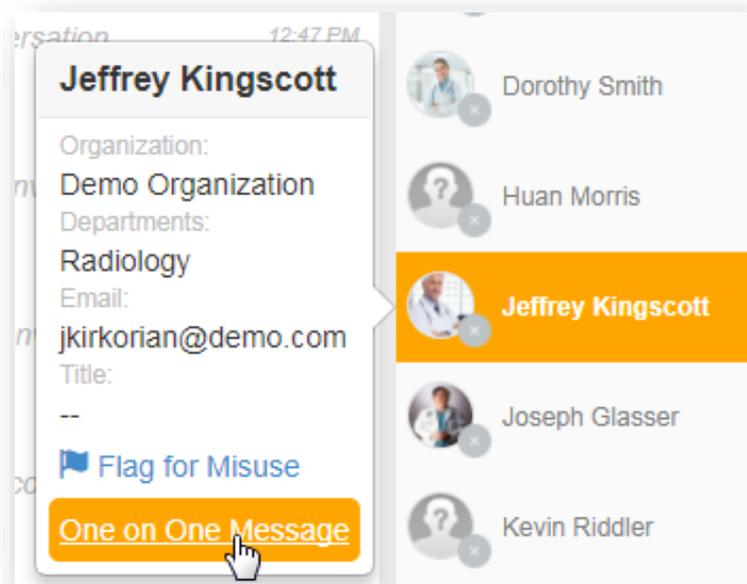
- Add other users to join the group
 - On the right-hand side under **Members**, click on the + icon to browse and add users to the group. You can also invite members from connected Backline organizations to join, if your organization allows this.



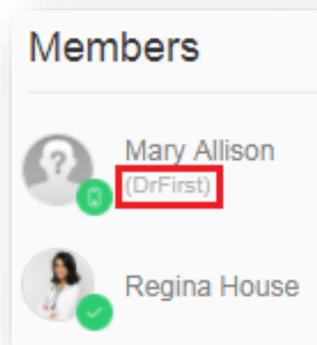
- To add a contact, type in the contact's name or scroll down and select them from the drop-down list. You can search via Organization as well. When finished, click the **Add Members** button to add.



- Under the members list, hover over a contact to view additional information, including organization, department, email address, phone number and title. You can also begin a 1-on-1 message with a member from this pop-up.



- Turn the sound notifications on or off for yourself from within the group chat by clicking the sound icon in the top of the chat
- A lock icon will appear next to the group name for all private groups. Non-members cannot search for the chat and can only be added by a member of the group.
- Department Group chats will have a portrait icon next to the group name. You cannot create, join or leave Department Groups. Department Groups are maintained by an Administrator in the Enterprise Console.
- If you are in a group chat that has external contacts, a globe icon will appear next to the group name. The name of their organization will appear below their name under the members list, if they are registered users belonging to a connected Backline organization. For non-registered users, (External) will appear below their name under the members list.

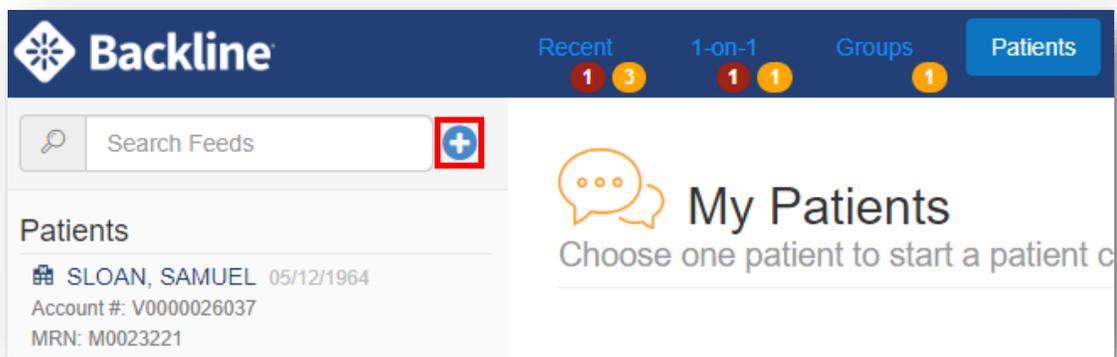


Managing Patient Centered Chats [PCC]

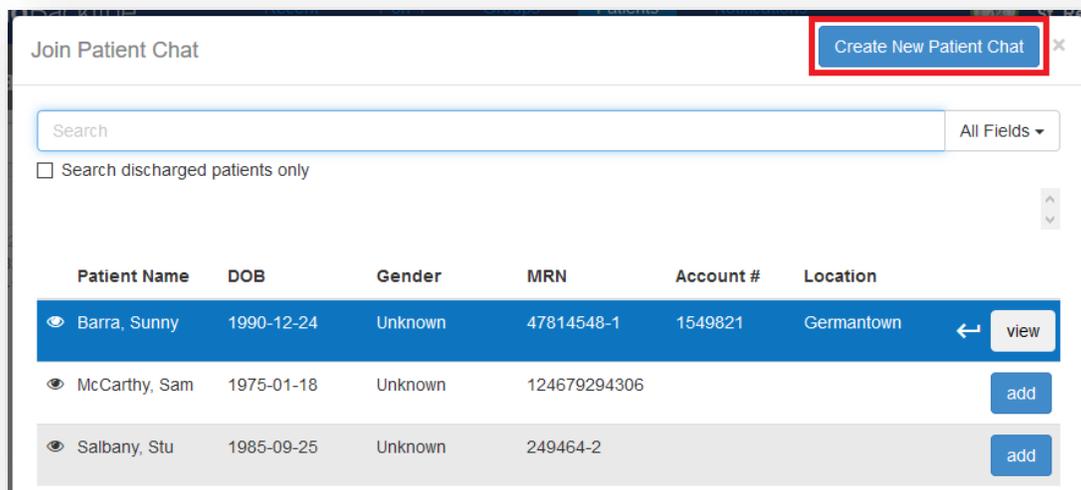
Patient Centered Chat [PCC] is a feature of Backline in which you can have an ongoing conversation between care team members about a specific patient.

Creating a Patient Centered Chat [PCC] Manually (When There is No ADT Feed Established)

1. Select **Patients** at the top of the screen
2. Click the **+** button to the right of the search field



3. Click on the **Create New Patient Chat** button on the far right



4. To create the chat, you will need to complete the following required fields for the patient:

- a. First Name
- b. Last Name
- c. Date of Birth
- d. Medical Record Number (MRN)

Create Patient ✕

Name *

Sam Middle Wishton

Phone Number

3012319510

Gender Male **Date of Birth *** 01/02/1985

MRN * 021645641 **Account Number**

Class Inpatient

Postal Code 20876 **Location** Germantown

Admit Date 06/12/2019 12 : 00 AM **Discharge Date** HH : MM AM

Deceased Private

Users (optional, users also can be added later)

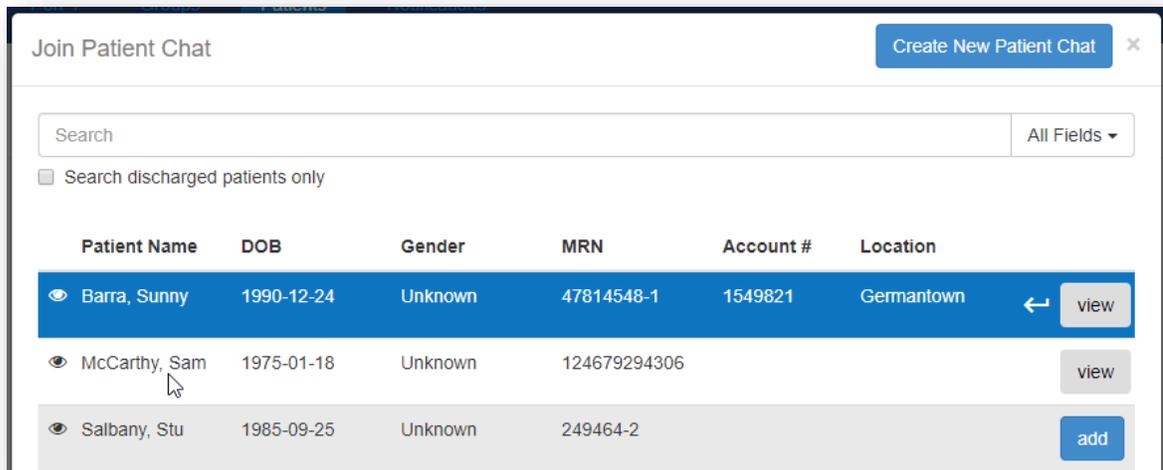
Enter a First or Last name

Cancel **Create**

5. Any other optional fields can be entered in as well, such as making the chat **Private**
Please Note: You can only select the **Private** indicator during creation of the chat
6. To add members while creating a patient or afterwards, type in a user's name or click into the search box to scroll down through the results. Select the user(s) to add.
Please Note: Only members of your organization can be added to Patient Centered Chats
7. Click the **Create** button

Search Patient Centered Chats [PCCs] to Join

1. Select **Patients** at the top of the screen
2. Click the **+** button to the right of the search field
3. Type in the patient's name (partial or full, first or last name), MRN, Account Number or Location in the search field. You can also filter to find only discharged patients.



Join Patient Chat Create New Patient Chat ✕

Search All Fields ▾

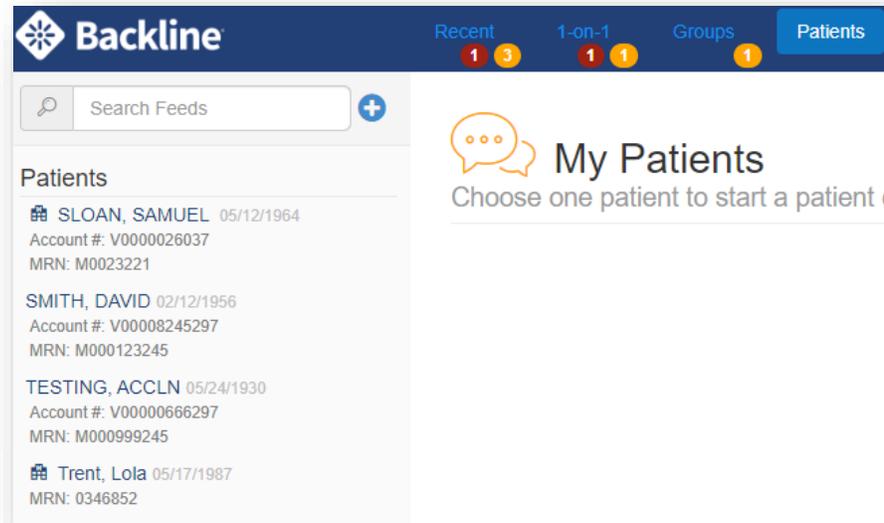
Search discharged patients only

Patient Name	DOB	Gender	MRN	Account #	Location	
Barra, Sunny	1990-12-24	Unknown	47814548-1	1549821	Germantown	← view
McCarthy, Sam	1975-01-18	Unknown	124679294306			view
Salbany, Stu	1985-09-25	Unknown	249464-2			add

4. On the search results page, you can:
 - a. Click **Add** to join the existing Patient Centered Chat
 - b. If you are already a part of the Patient Centered Chat, click **View**

Patient Centered Chat [PCC] Functions

- PCCs in which you are a member, will be listed on the left menu bar in alphabetical order under the **Patients** section



- You can message other members of the PCC the same way users chat with 1-on-1 contacts and groups
 - Users can chat, view chat history, and upload files
 - Users can view how many members of the PCC are online or have viewed a particular message in the discussion
 - When a user hovers over the viewed message count, it will display **Viewed by** with a date/time stamp
- On the top of a PCC, a user can view the patient's demographics (Name, Gender, Date of Birth, MRN, etc.)



- If a PCC was manually created, you can click on the edit button to modify the patient's demographics.
- You can mute sound notifications for yourself within the PCC
- If you are a part of a PCC which is confidential, a lock icon will appear next to the patient's name. This means that other users cannot search for this PCC, and they can only be added by a member of the group or by an administrator.
- Under the **Members** list on the right side, you can hover over any of the contacts to view additional information including their organization, department(s), email address, phone number and title
- If you want to leave a PCC, you can click on **Leave Chat**. This will remove the PCC from your active list. If the PCC is not marked confidential, you can return to it as needed.

Features with ADT Feed

- If an ADT feed has been enabled, users will not be able to add new patients or edit a patient's demographic information. They will use the search field to find a patient they are looking for and join the Patient Centered Chat.
- If a Patient Centered Chat created by an ADT feed should be made confidential, it can be done by an administrator (Admin Full role) through the Enterprise Console
- When an ADT feed is turned on, users can view the account #, inpatient/outpatient status, location and other patient demographics
- Users can also view the **Last Event** for the patient, such as the prior and current bed location
- Any change in status from an ADT message will be visible as a chat entry enclosed in a gray box

MINORS, TIMOTHY (07/15/1968)

Class: I Admit Date: 02/24/2016 Gender: Male MRN: M0000196 Account Number: B00001261949 Postal Code: 54968 Location: 4N-402-B
Last Event: Patient was admitted to 4N-402-B at 02/24/2016 15:56.

Mar 6, 2018

Patient was admitted to 4N-402-B at 02/24/2016 15:56.

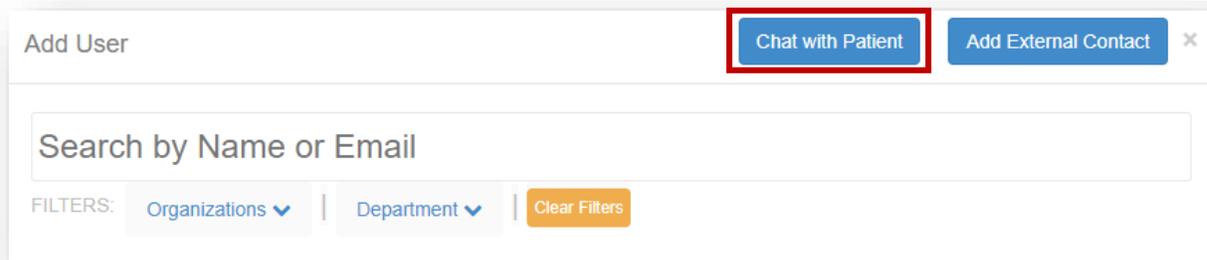
Managing Chat with Patient

This additional chat type is optional and must be configured to appear for your organization. Please contact your Account Manager, Sales Representative or our Support Team for more information on enabling this feature.

This chat type allows you to initiate a chat with a patient. This can be done from both the desktop and mobile versions of Backline. If your organization enables this feature, the chat will appear within your 1-on-1 list of chats.

Via 1-on-1 Chat

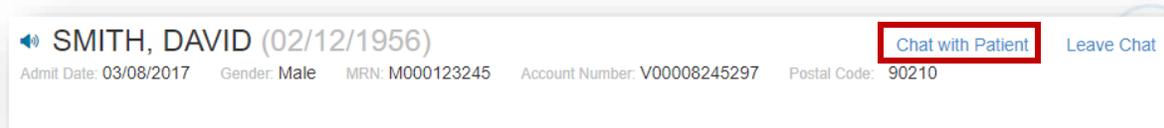
- Click on **1-on-1** at the top of the page
- Click the **+** button to the right of the search field
- Click the **Chat with Patient** button



The screenshot shows a dialog box titled "Add User". At the top right, there are two buttons: "Chat with Patient" (highlighted with a red box) and "Add External Contact" with a close icon. Below the buttons is a search input field labeled "Search by Name or Email". Underneath the search field, there are filter options: "FILTERS: Organizations", "Department", and a "Clear Filters" button.

Via Patient Centered Chat [PCC]

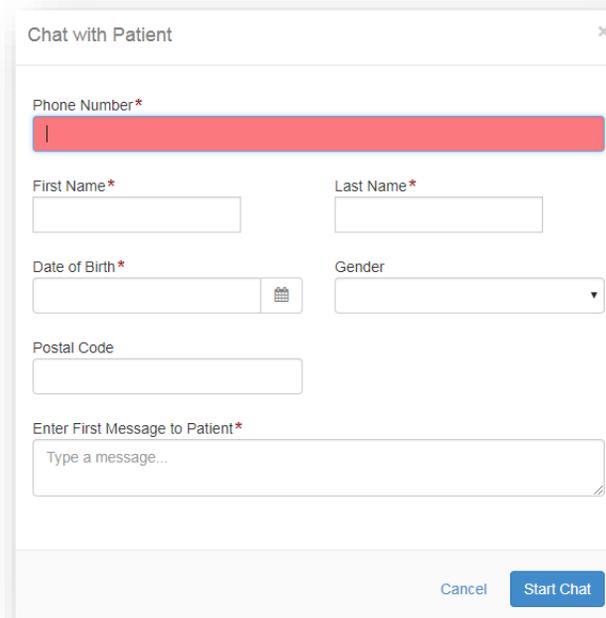
- Click on **Patients** at the top of the page
- From here, you can click on any existing PCC or create a new Patient Centered Chat
- From inside the Patient Centered Chat, click the **Chat with Patient** hyperlink



The screenshot shows a patient profile card for "SMITH, DAVID (02/12/1956)". Below the name, there are details: "Admit Date: 03/08/2017", "Gender: Male", "MRN: M000123245", "Account Number: V00008245297", and "Postal Code: 90210". At the top right of the card, there are two buttons: "Chat with Patient" (highlighted with a red box) and "Leave Chat".

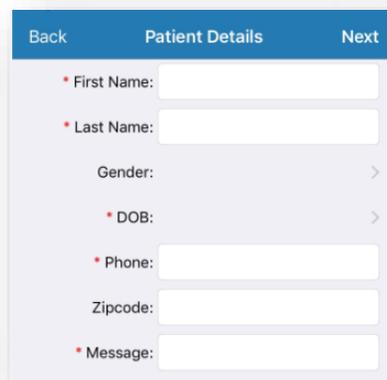
Initiating a New Chat with Patient Session

1. Fill in the required fields for the patient, including their phone number, first name, last name, date of birth and the initial message
 - a. This can be launched from the desktop version of Backline as shown below



A screenshot of a desktop web form titled "Chat with Patient". The form contains several input fields: "Phone Number*" (a red input field), "First Name*" and "Last Name*" (two separate input fields), "Date of Birth*" (a date picker), "Gender" (a dropdown menu), "Postal Code" (an input field), and "Enter First Message to Patient*" (a text area with a placeholder "Type a message..."). At the bottom right, there are "Cancel" and "Start Chat" buttons.

- b. This can also be launched from the mobile Backline version as shown below

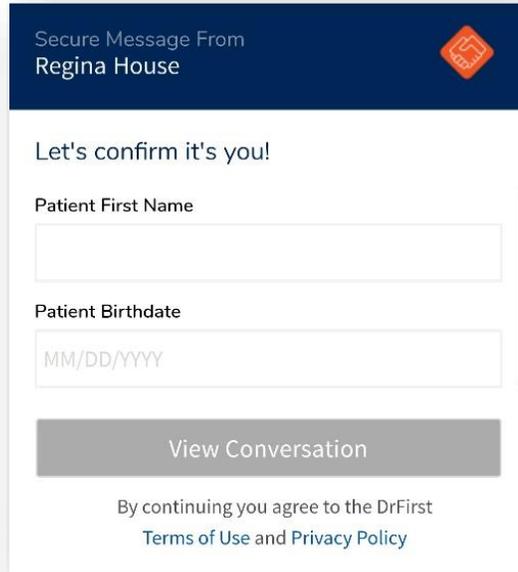


A screenshot of a mobile web form titled "Patient Details". The form has a blue header with "Back", "Patient Details", and "Next" buttons. Below the header are several input fields: "* First Name:", "* Last Name:", "Gender:" (with a right arrow), "* DOB:" (with a right arrow), "* Phone:", "Zipcode:", and "* Message:". The asterisk indicates required fields.

Please Note: The demographic information will automatically populate if launching from a Patient Centered Chat.

- The patient will then receive an SMS text message that includes your name and organization. There will be a link in the message to open a web browser page, which will prompt for the patient to confirm their first name and date of birth.

Please Note: This link can only be opened on smart devices.



Secure Message From
Regina House

Let's confirm it's you!

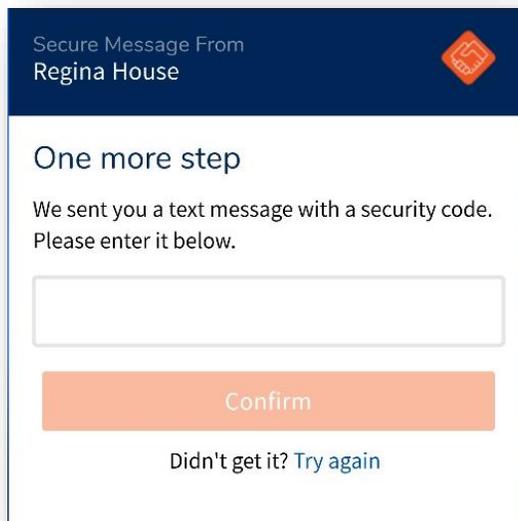
Patient First Name

Patient Birthdate

View Conversation

By continuing you agree to the DrFirst
[Terms of Use and Privacy Policy](#)

- Next, the patient will need to confirm the verification code that they receive via a second SMS text message.



Secure Message From
Regina House

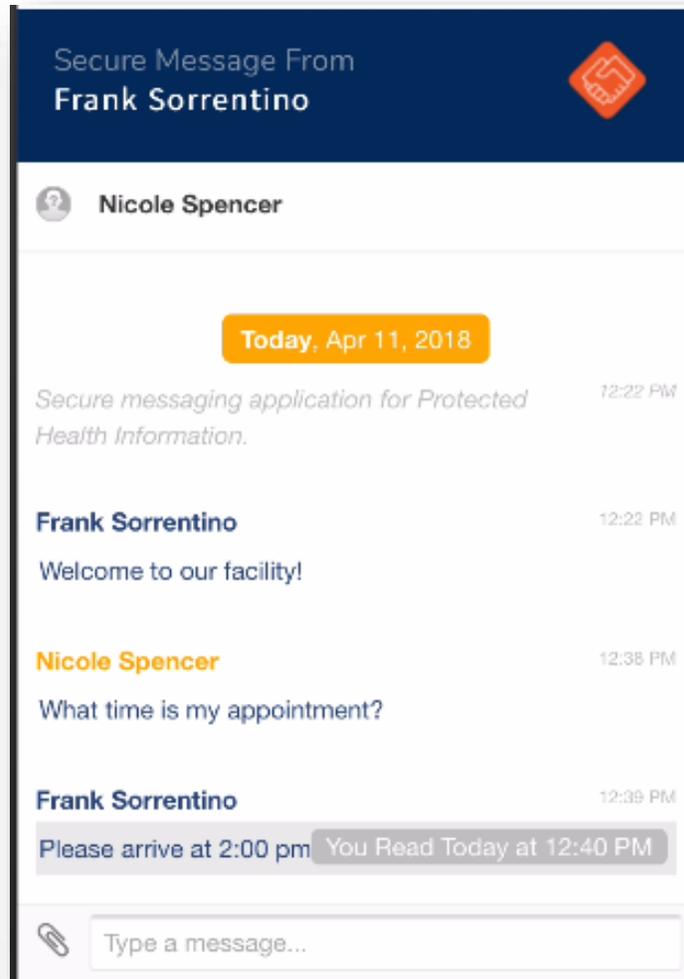
One more step

We sent you a text message with a security code.
Please enter it below.

Confirm

Didn't get it? [Try again](#)

4. After the code is successfully confirmed, the patient will be brought to a secure screen to participate in a message session with the sender
 - a. If the code is incorrect, the patient will receive an error message



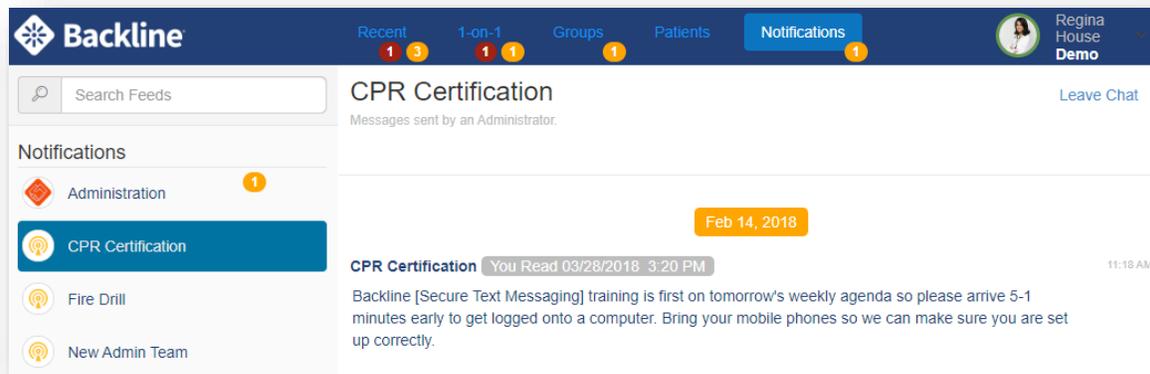
Notifications

All notifications are either controlled by an administrator at your organization or through integration settings. They are view-only and cannot be replied to.

You can view them on the **Recent** tab or isolated by clicking the **Notifications** tab.

Administrative Message Notifications (Broadcast Messages)

Your administrator(s) may choose to send mass messages to a group of users as notifications. The frequency and type of alerts being sent will depend on your organization's use of the notifications feature.



You may leave a **Notifications** chat to remove the listing for the entity that sent the notification message by clicking on **Leave Chat**. If this removed entity sends another message in the future, it will be added back to your **Notifications** list.

Notifications of Undeliverable Prescriptions (NUS)

Backline is integrated with Rcopia, DrFirst's e-prescribing solution, allowing providers to be notified via Backline's secure messaging system when a prescription does not reach the intended pharmacy.

Script Notification

Automated notification generated by Script Notification. [Leave Chat](#)

MESSAGE FOR John Smith

Prescription DF-1232515, sent 02/16/2016 10:18AM FAILED electronic delivery and/or 3 fax attempts.

Please take other actions to ensure that this medication is properly sent.

Patient: Jones, Mary
Date of Birth: 1985-01-21

Atorvastatin 1 mg tablet
Take 1 tablet daily as needed
Call if any questions
1 week
30 tablet
0 refills
No Substitution

For your reference the pharmacy contact information is below:

CORNER DRUGSTORE

2021 3rd Avenue
New York, NY 10029

Phone: (212) 555-0007
Fax: (212) 987-0071

Please contact your local informatics support team with any Electronic Prescribing concerns. Feel free to contact DrFirst if there are any Akario Backline concerns.

Thank You
DrFirst Support
866-263-6512

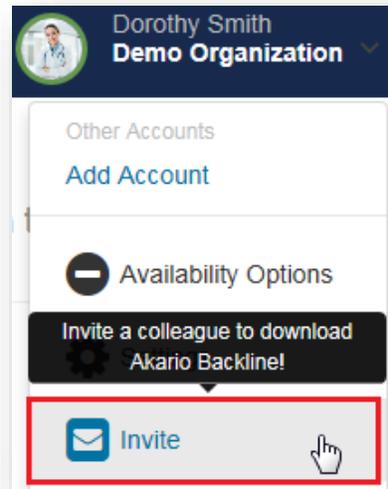
The NUS message includes prescription details, information about how to resend the prescription and the pharmacy's contact information. To set up an account for NUS, please contact your administrator.

Interface Notifications

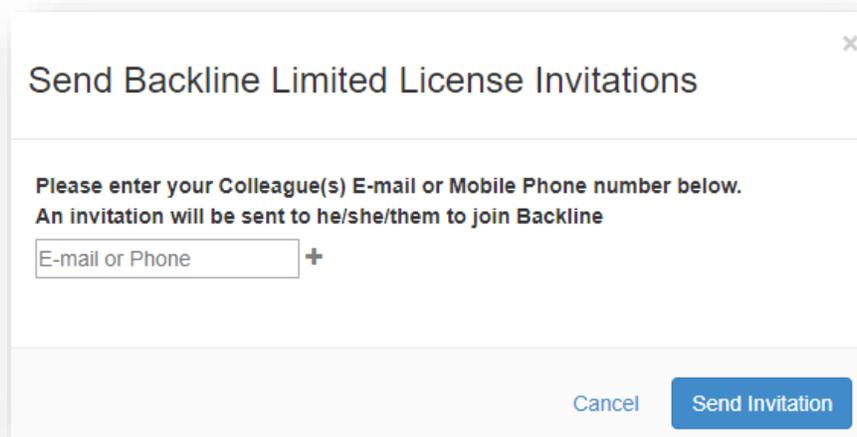
Backline can be configured to send Admission, Discharge and Transfer [ADT] event notifications, as well as order and result notifications, to a specific user or group of users for the purpose of expediting patient care. Additionally, Consolidated-Clinical Document Architecture (C-CDA) content for an encounter can be delivered to providers of record upon discharge through a Backline notification. Please contact your administrator for additional information.

Invite Colleague to Download Backline

1. To invite a colleague to download Backline, click on **Invite** from the top right corner dropdown



2. Input your colleague's email address or phone number, and click the **Send Invitation** button



Send Backline Limited License Invitations

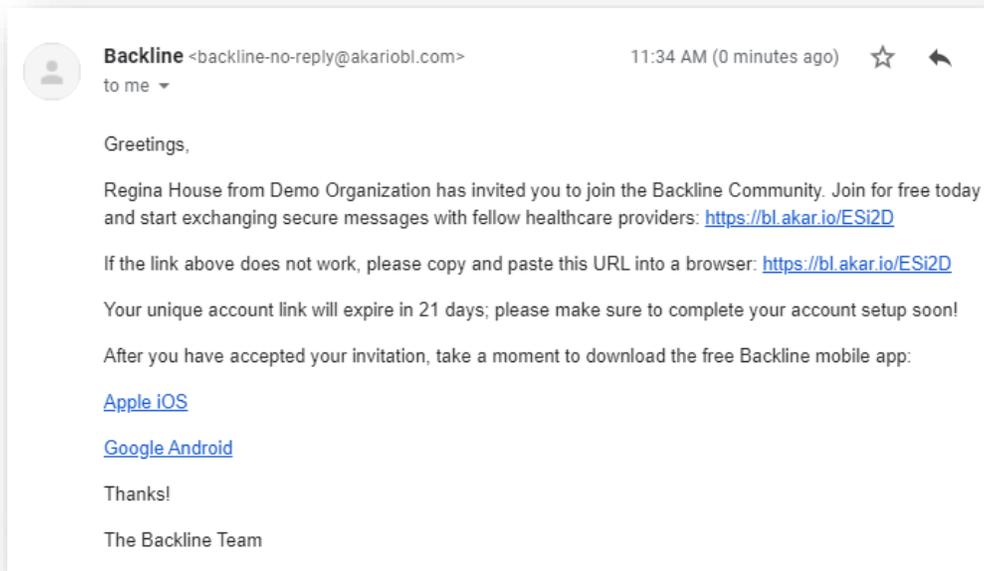
Please enter your Colleague(s) E-mail or Mobile Phone number below.
An invitation will be sent to he/she/them to join Backline

E-mail or Phone +

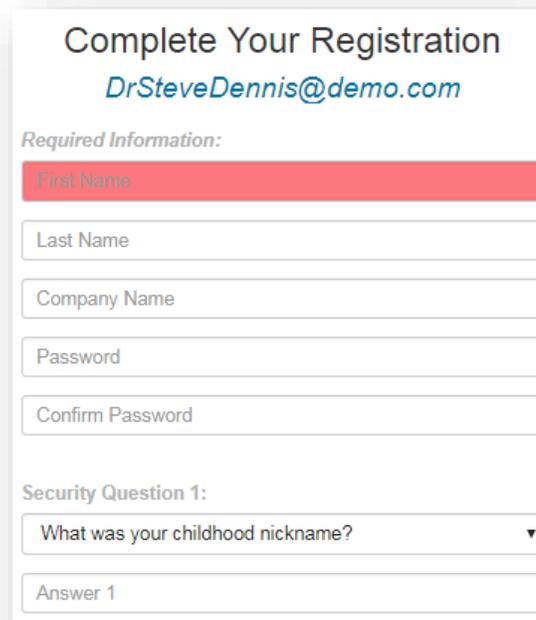
Cancel Send Invitation

3. There is no ability to send an initial welcome chat with this feature, so you may want to notify the colleague in advance that the invite will be coming from you
4. Your colleague will receive an invitation to join the Backline Community
 - a. Once they join, you will be able to interact with them through a 1-on-1 chat, if your organization allows this

5. Your colleague can click the hyperlink at the top of the message on their phone or in the email to register their account



6. Once the invited user clicks on the link, they will be taken to a screen to complete registration
 - a. They will enter required information, set up a password, and complete security questions
 - b. If they already have an account, they will be taken to a different screen to log in



The image shows a registration form titled 'Complete Your Registration' for the user 'DrSteveDennis@demo.com'. The form is divided into two sections: 'Required Information' and 'Security Question 1'.

Required Information:

- First Name (highlighted in red)
- Last Name
- Company Name
- Password
- Confirm Password

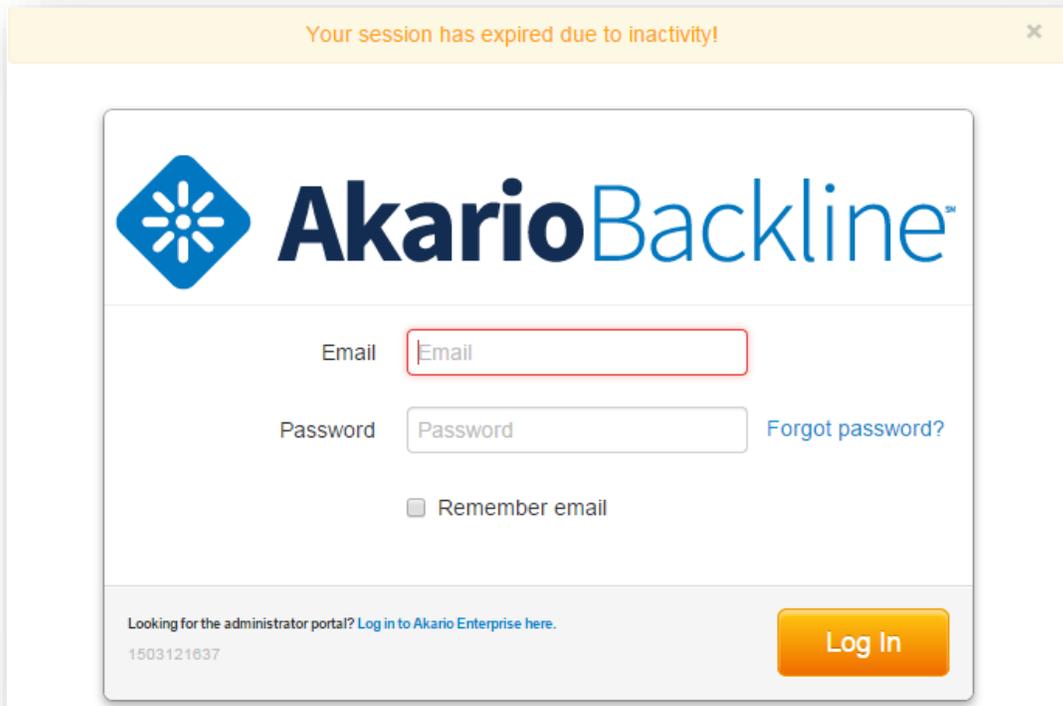
Security Question 1:

- What was your childhood nickname? (dropdown menu)
- Answer 1

Time-out of Backline

If you have been idle in the system for 15 minutes, you will be taken back to the login screen to re-enter your password. You will receive a message along the top of the screen to notify you of the inactivity. Fifteen minutes is the default value and can be customized by your organization.

If you remain inactive beyond the timeout for an additional two hours, you will be completely logged out of Backline.



Your session has expired due to inactivity!

 **Akario**Backline™

Email

Password [Forgot password?](#)

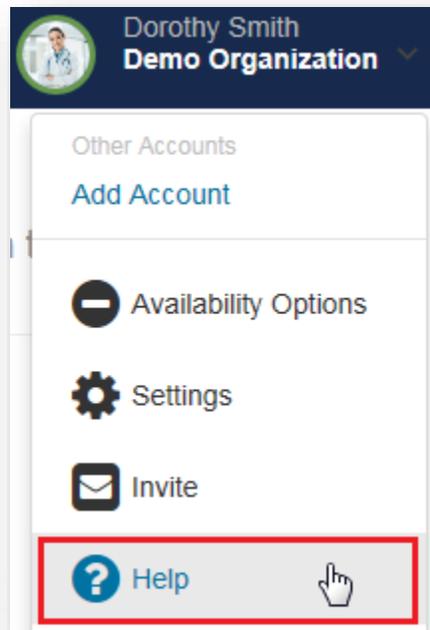
Remember email

Looking for the administrator portal? [Log in to Akario Enterprise here.](#)

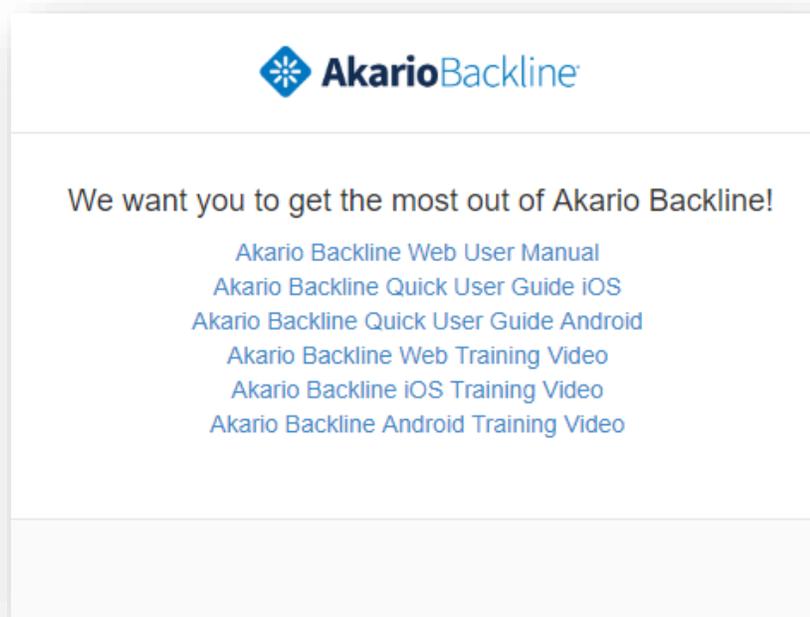
1503121637

Help with Backline

For help and additional resources, click on the **Help** option from the top right corner dropdown.



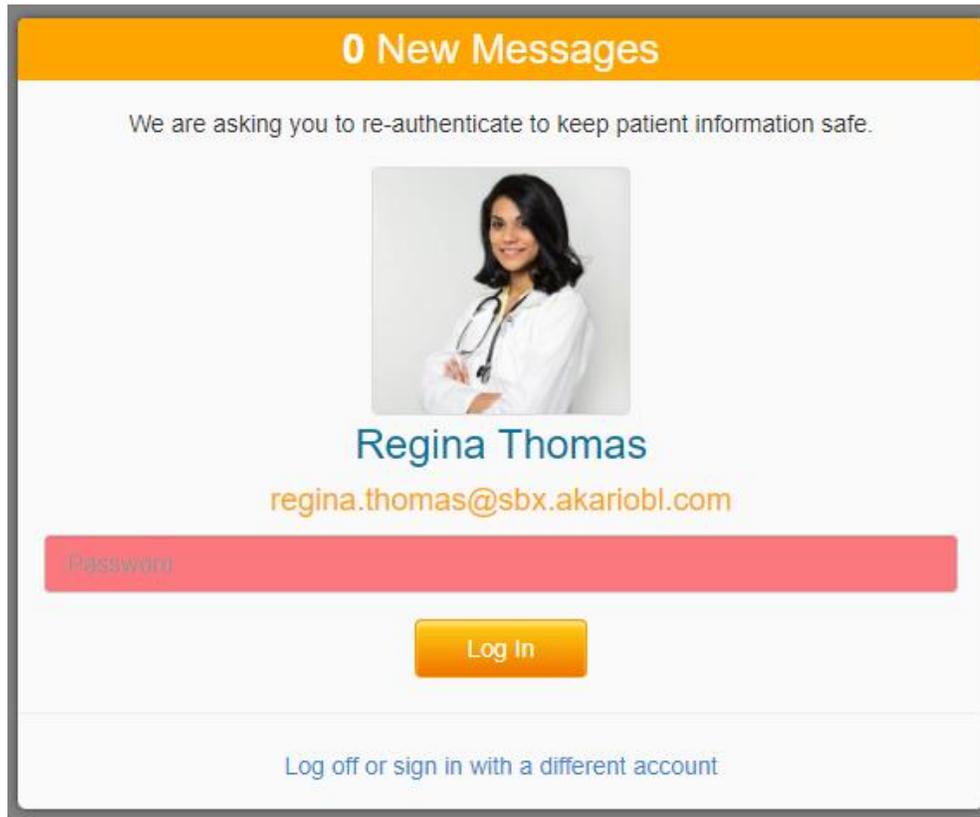
A pop-up window will appear with training manuals and training video links for reference.



Lock Chat

If you are stepping away from the computer and would like to lock the chat for a short time, you can use the **Lock Chat** feature that appears in the menu dropdown.

When you return, you will just need to enter your password to log back into Backline.



0 New Messages

We are asking you to re-authenticate to keep patient information safe.



Regina Thomas
regina.thomas@sbx.akariobl.com

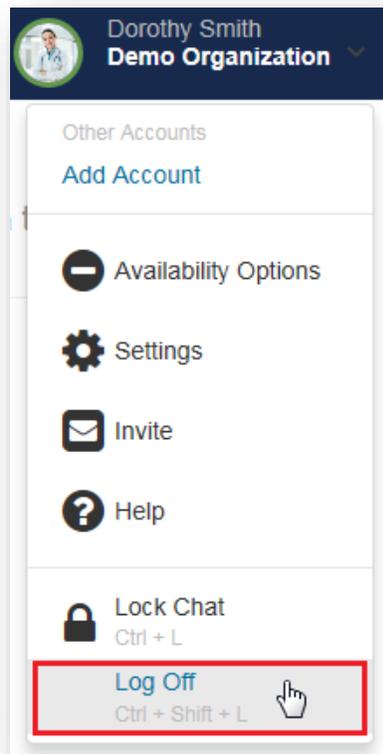
Password

[Log In](#)

[Log off or sign in with a different account](#)

Logging Out

1. To log out of the system, simply click into the top right corner dropdown
2. Click the **Log Off** option



3. Click the **Yes** button to confirm
 - a. This will log you out of the system and redirect you to the login page

Report a Problem / Help

If you have any questions or require assistance with any usage or account issues, you can contact your support resource or DrFirst's 24/7 Support Team.

If contacting DrFirst Support, please have your username / login name to help us expedite your service request. You can reach us through the below channels.

- Call us 24/7 at (866) 263-6512
- Log in to your JIRA Service Desk account to submit an online support request

If you do not yet have a JIRA Service Desk account, please work with your Account Manager, Implementation Specialist, or our Support Team to have one created.