docbookMD

DocbookMD
user manual

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Setting Up DocbookMD

Login Screen

The login screen appears the first time the app is opened. Select "Create Account" to register as a new user or enter your registered email address and password to sign in if you already have an account.

1) Select "Create Account" to register for the first time (existing users enter email and password created when you first registered. If you forgot your password, select "Forgot Password" to reset.

2) Enter your first name, last name, and email address.

3) Confirm your identity by answering the security questions when prompted.

Security Questions

DocbookMD works with a third party that creates security questions to verify you are the correct person registering. This authentication often requires you to enter the last 4 digits of your SS# Security questions, including the request for the last 4 digits of your SS#, are NOT generated or stored by DocbookMD.

Enabling Notifications

On first Log In, new users are prompted to enable Push Notifications. Click "OK", otherwise no visual alert or sound will notify you of new messages.

- You must click "OK" in order to receive new messages. DocbookMD uses Push Notifications to send alerts about new messages – both audio & visual.

- Android's default is to allow Push Notifications – iOS's default is to not allow.
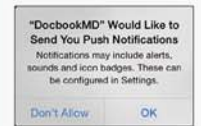
Customizing Notifications

Once Push Notifications are enabled, users are able to manage how new message notifications are displayed via device settings.

iOS:
1) Open the main "Settings" Tab.

2) Select Notification Center.

3) Scroll to DocbookMD app.

4) Choose Alert Style:
- Alert: Displays pop-up notification regardless of current operation on phone – requires action.

- Banner: Displays notification of new message across the top of device and automatically disappears.
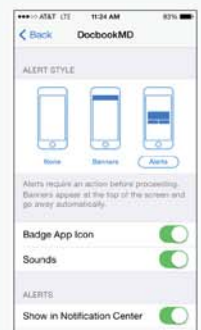
Android:
1) Open DocbookMD app

2) Select "Settings" Tab from main menu

3) Check "Pop-up notifications" box to display alerts on your active screen of new messages.
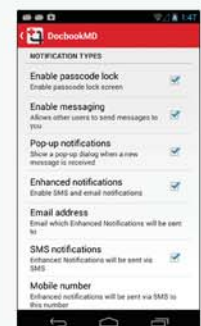
Main Menu

Menu Contents

Tap the ▤ at the top-left of your screen to access the main menu . Menu options include:*

- Messages (see pg. 6)
- Favorites (see pg. 5)
- Directory (see pg. 4)
- Specialties (see pg. 5)
- CareTeam (see pg. 8)
- Groups (see pg. 8)
- Pharmacies (see pg. 8)
- MedPage Today (see pg. 9)
- Support (see pg. 10)
- Settings (see pg. 9)

Directory

Elements of a Profile

Each physician or staff member in the directory has a profile which is provided by the participating medical society or Enterprise.

1) General Information: Includes a photo, name, specialty, medical school, and office number.
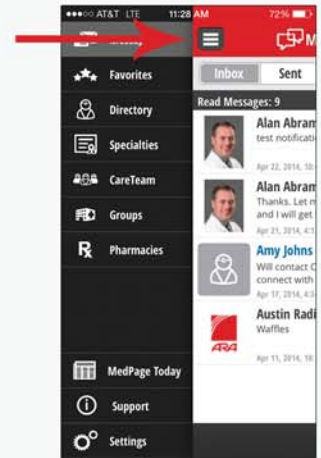
2) Affiliations: Hospitals, groups, or subgroups in which an individual participates.

3) Send an Invitation: Lets you personalize an email to a colleague within the directory, prompting them to download and communicate via DocbookMD.

4) CareTeam:** List of the physician's CareTeam members (see pg. 8) and their titles.

5) Contact Information: Phone, address, and email address – This information is provided by your medical society or group to DocbookMD, and may be customized by each organization. Any incorrect information can be corrected temporarily by DocbookMD, but to permanently correct it, please contact your participating society or group.

6) Add to Favorites: Communicate with this physician often? Add to your favorites list (see pg. 5) for quicker access.

7) Map: Shows the location of the physician's office.
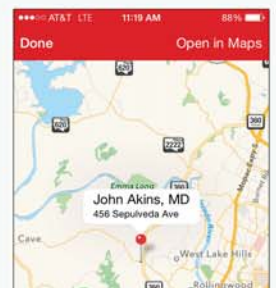
*Your menu may look different than this one. Our Enterprise customers have customized features, reflected in the main menu.

**CareTeam is an add-on feature and may not be visible to you at first. Contact support for more information.

Identifying Other DocbookMD Users

Registered users who have Messaging (under "Settings") enabled, are designated by an 💬 icon next to their name.

Searching by Name

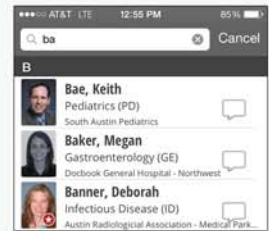Select the "Search Physicians" field at the top of the directory and type the first few letters of a physician's last name, or tap on the first letter in the right hand alphabet index and scroll for a quick search. DocbookMD also allows for a compound search by typing the last name and a zip code or last name and specialty in the search bar.

Searching By Specialty

Use if you don't have a specific colleague in mind but need to communicate with a specific specialty.

1) In the main menu tap on "Specialties".

2) Select the "Search Specialties" field at the top of the screen and type the first few letters of the specialty

-OR-

3) Browse through the list of specialties in alphabetical order. Tapping a letter on the right side of the screen will directly navigate to specialties beginning with that letter.
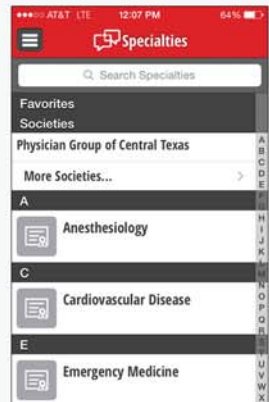
Viewing a Different Directory

From the menu bar tap "Directory", and by default, all directories that you have access to will display alphabetically when you open DocbookMD. You can select which directory to view at any time.

1) Below the "Search" bar and "Favorites" is the "Directories" section.

2) The directory you are currently viewing is listed on top.

3) Select "More Directories..." to view and choose additional directories that are available to you.

Favorites

Colleagues, Specialties, or Pharmacies that you communicate with on a regular basis can be added to your favorites list. This allows for even faster communication. You can simply tap on the thumbnail image until a red star appears, or:

1) Open a profile in the directory.

2) Scroll down and tap "Add to Favorites".

3) Colleagues, Specialties and Pharmacies added to your Favorites will be designated by a red star in the directory, appear in the Favorites section of the directory, and be easily accessible in the "Favorites" tab of the main menu.

Messaging

The Message Center
Each message has multiple pieces of information:

1) A thumbnail photo and name of the person sending the message.

2) The first two lines of the message.

3) A speech bubble with a number inside (30) – this denotes the priority time the sender has specified that they would like a response from you; if you do not open in this timeframe, the sender will receive a notification, and you will receive a text or email, if you have enabled "Enhanced Notifications" (see page 9).

4) Attachments paperclip ( ) denotes that an image is attached. You must open the message to see the attachments.

5) The white number in the grey box (5 ▶) denotes the number of messages in a thread.

Inbox
All messages are organized by conversation, either single or threaded messages, and remain in your Inbox until you move them to the Trash folder. A new message will appear as an alert on your device, which you can swipe to open directly – or you can go into the app and go to the "Messages" folder.

Archive
Allows you to save important messages in a separate folder from your Inbox for quick review later. From the main "Messages" screen, tap "Edit" in the bottom right corner, select a conversation to archive, and tap the folder icon. This will remove the message from your Inbox, but keep it accessible for a later time.
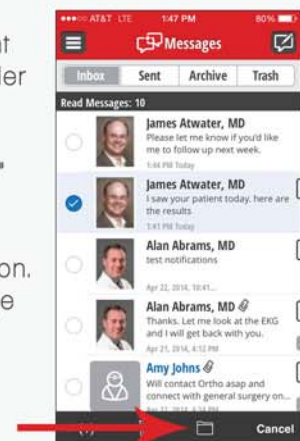
Sent
View any messages that you've previously sent. Note: "Read" and "Sent" times are seen under each message.

Trash
Swipe right to left on any single message and tap "Trash" to move to the Trash folder. Do the same on any threaded message to move the entire conversation to your Trash folder. Inside the Trash folder, swipe an individual message or thread, and tap "Delete", or tap the 🗑 icon in the bottom left corner to empty the entire Trash folder all at once. Messages remain in the Trash folder until you manually empty it.
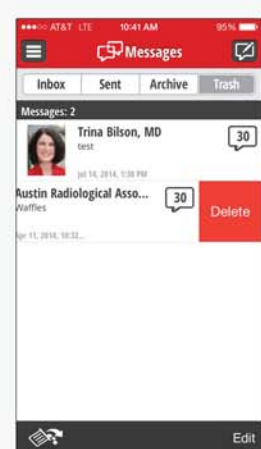
Composing a Message

DocbookMD allows for instant, HIPAA-secure messaging between DocbookMD users.

1) Select a colleague from the directory and tap the icon in the upper right corner to initiate a message.

2) Input the patient's name and D.O.B in the proper fields, if desired (optional).

3) Type your message, select a time priority (see below) and press "Send".

Dictating a Message

Messages can also be dictated using "Siri" or "Google Now".

1) Follow the directions above to initiate Composing a Message.

2) Tap the icon (avaibale on iPhone 4S or newer) on the keyboard and begin dictating your message.

3) Press "Done" when dictation complete. Edit text if necessary before sending.

Attaching an Image

Exchange X-rays, EKGs and other critical patient images with your colleagues.

1) Tap the icon at the bottom left corner of the message screen.

2) Choose whether to take a new picture using the camera, or select an existing image from your device. Note: No images taken through the DocbookMD app will be stored on the device's photo gallery.

3) If you're happy with the image select "Use Photo". If not select "Retake".

4) Add up to four images per message.

Choosing a Message Time Priority

Based on the situation, messages can be sent with priority times of "5 minutes", "30 minutes", or "None". If the message is not read by its recipient within the desired time, the sender will receive an alert and know to move on to other options.

1) Tap one of the icons (5 min, 30 min, or None).

2) Send the message.

3) You will receive an alert if your message was not read within the selected time of 5 or 30 minutes; if "None" was selected, you will not receive notification.

4) If "None" is selected, the recipient will receive an alert (if they choose – see "Notification Sounds" pg. 9), but they will not be further notified by enhanced notifications, as they would for a timed priority (see "Enhanced Notifications" pg. 9).

Forwarding and Replying to a Message

1) Tap the icon.

2) Choose whether to "Reply" or "Forward".

3) "New Conversation" will start a new thread.

4) Add your message and press "Send".

CareTeam*

Inviting CareTeam Members

Invite other healthcare professionals to your CareTeam (e.g. PAs, RNs, Hospice). They will have access to you and other members of your CareTeam.

1) From the main menu, select the CareTeam tab.

2) Select "Let's Get Started" to begin inviting.

3) Invite using first, last name and either email or mobile phone number.

4) Possible Matches – DocbookMD will search existing users to determine if your invitee is already active in the app. If yes, they are added to your care team. If not, an invitation is sent to them and they will need to register (1st time only).
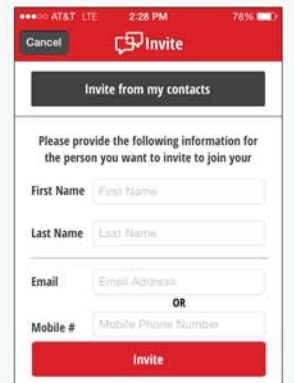
Managing CareTeam

1) Messaging: Toggle the messaging button on/off any time to control Care Team member's access to you. When set to off, they are unable to message you but can still message with other CareTeam members.

2) Listed in profile: You can choose to have CareTeam members displayed in your profile, or not. Just select the individual CareTeam member and toggle the "Listed in Profile" button to on/off.
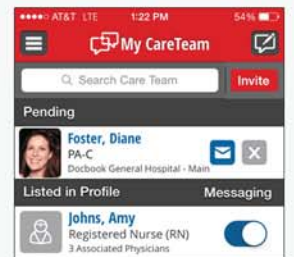
Groups

Selecting a Group or Affiliation

The "Groups" tab is a list of pre-designated affiliations in which you have been given access to view. Subsections of the DocbookMD directory allow for faster access and a higher level of organization. Groups can include everything from full practice listings to specific subsets of an enterprise (i.e. 5th floor nurse's station).

1) From the main menu, select the "Groups" tab.

2) Scroll through your available groups and select the one you need.
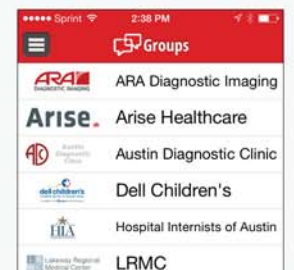
Pharmacies

Searching for a Pharmacy

Contact information for local pharmacies makes it easy to locate the right one for your patient, based on location or other preference.

1) From the main menu, select the "Pharmacies" tab.

2) Scroll through or tap a letter on the right side of the screen to search alphabetically by name

-OR-

3) Enter name (even partial) and zip code in the "Search Pharmacies" field to narrow your search.

* Note this is an add-on feature and may not be on your app today.

Newsfeed (optional feature)

Viewing the Newsfeed

MedPage Today is a trusted news service for physicians that provides a clinical perspective on breaking medical news allowing you to stay abreast of industry trends of interest to you and your patients.

1) From the main menu, select the "MedPage Today" tab.

2) Register here as a user to customize your news feed.

Settings

iOS

Enable Messaging

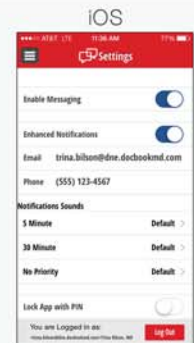- Toggle this button on/off based on your desire to receive HIPAA-secure messages through the DocbookMD app. On is the default setting – and is the only way you can receive a message through DocbookMD.

- Toggling off eliminates the ability to receive message, and removes the [icon] icon from your directory profile.

Enhanced Notifications

This feature adds an extra layer of notification options by sending you an email and/or standard text message if you have not read a pending DocbookMD message within the requested response time. No message content is sent, simply an alert that you have an unread DocbookMD message.

Android

1) Toggle on.

2) Enter an email address and/or mobile phone number to receive an email or text alert of a pending DocbookMD message. These alerts only go through the enhanced features if you have not opened a message after 80% of the priority time has passed. If "None" was selected as the priority, then no enhanced notifications will be sent.
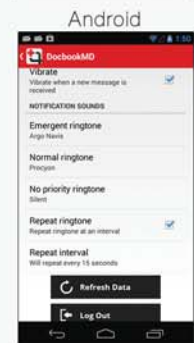
Notification Sounds

Choose a specific ring tone for each priority time so that you'll always recognize a DocbookMD message, and know when it may be an emergency.

1) Select a priority time (5 minute, 30 minute, or "No Priority").

2) Scroll through the list of ring tones. You can preview a ring tone by tapping on its name.

App PIN Lock

As an added layer of security, you can lock the DocbookMD app using a custom 4-digit PIN. When set, you will need to input this PIN number each time you open the app. This PIN will not affect your other apps.

1) Toggle on.

2) Enter a 4-digit PIN.

Refreshing Data

Tap this button to manually refresh the directory and pharmacy data. Refreshing will not affect your saved favorites, CareTeams, or messages.

Refresh Data

Logging Out

Tapping this button will log you out of DocbookMD. You will no longer be alerted when you receive a message, and you will need to re-enter your email and password to log back in. Any messages you receive while logged out will be available upon your next login.

Log Out

Support

Contacting DocbookMD

It is our mission to help physicians and their care teams improve patient care through secure & efficient communication. DocbookMD support is available to answer questions, troubleshoot and resolve any issues you are having with the app.

- Contact by phone by tapping the "Call Us Directly" button (mobile phone only).

- Contact by email by tapping the "Submit Email" button and typing your message.
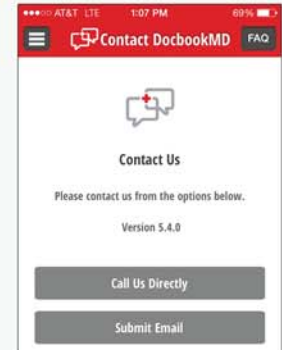
In-app FAQs

Tap the "FAQ" button at the top of the Support screen to open a list of frequently asked questions, support topics, and tutorial videos.

- Scroll through the list of topics and tap on the one that covers your question.

- Submit a new support request by tapping "Submit a request" at the bottom of the screen if your question is not covered in the FAQ.

- Tap on "Tutorial Videos" for step-by-step walkthroughs of how to use the DocbookMD app.
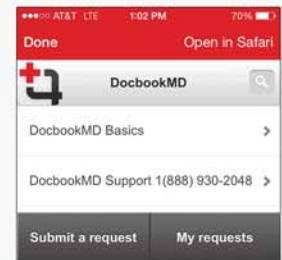
DocbookMD for PC/Mac

Accessing the DocbookMD Web Version

DocbookMD is available on PC and Mac computers via an online web app. No software needs to be downloaded to the computer, but an internet connection is required for access.

1) Visit http://www.docbookmd.com from a desktop or laptop PC or Mac.

2) Click the red "Sign Up / Login" button at the top right corner of the page.

3) Enter your DocbookMD login email and password.

Printing and Saving Messages

DocbookMD messages and images can be printed or saved as a PDF directly from the web version of the app, using your existing PC/Mac computer and printer.

1) Open the message you want to print.

2) Click the 🖶 icon at the top right of the screen.

3) Select a printer or choose Adobe PDF to save to your computer.

Registering via the DocbookMD Web Version

Your same login credentials work across all versions of DocbookMD, but if you don't yet have an account, you can register through the web version just as easily as you can with the mobile app.

1) Visit http://www.docbookmd.com from a desktop or laptop PC or Mac.

2) Click the red "Sign Up / Login" button at the top right corner of the page.

3) Below the email and password fields, click "New to DocbookMD? Sign-up".

4) Enter your first name, last name, and email address.

5) Confirm your identity by answering the security questions when prompted.

Security Questions

DocbookMD works with a third party that creates security questions to verify you are the correct person registering. This authentication often requires you to enter the last 4 digits of your SS#. Security questions, including the request for the last 4 digits of your SS#, are NOT generated or stored by DocbookMD.

Notes:

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DocbookMD for CareTeam Members

Accepting an Invitation

DocbookMD is available to any member of the CareTeam who has been invited by a participating DocbookMD member. The CareTeam leader must invite each member of their team through the invitation tab within the app, and they may invite as many CareTeam members as they'd like. (See "Inviting CareTeam Members" on pg 8)

1) Open the invitation email from the inviting member.

2) Click on the "Proceed to Registration" link.
   - If you have been previously invited and have completed the registration process, select "I have already registered for a DocbookMD account", and enter your email and password.

   - If this is your first DocbookMD invitation, select "I am new to DocbookMD" to continue on to registration.

Registering for DocbookMD

1) Enter your email address (this will also serve as your login username), first and last name, and mobile phone number. Check the box marked "Display on my DocbookMD profile" if you want others to see this number.

2) Enter your career information including job title, position, and specialty.

3) Enter the contact information for your practice.

4) Upload a profile picture (optional). Use a professional headshot if available. This can be done at any time.

5) Sign the Business Associate Agreement (BAA). This allows DocbookMD to receive, maintain, and transmit health information protected under HIPAA on your behalf.

6) Create your DocbookMD password. Passwords must include at least one number, one upper-case and one lower-case letter, and be at least eight characters long.

7) Answer the security questions *accurately* to verify your identity.

   Note: DocbookMD does NOT generate these questions or store your responses, but works with a third party that creates security questions to verify your identity at registration. This authentication requires you to enter the last 4 digits of your SS#. Neither DocbookMD nor the third party keep any of this information. See DocbookMD's Privacy Policy for more information.

8) Download the DocbookMD app on your mobile phone or tablet and sign in with the email address and password you just created.
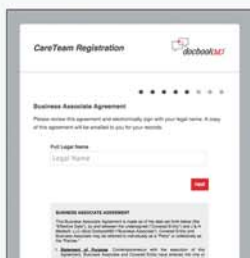
Using DocbookMD for CareTeam Members

Logging In
The login screen appears the first time the app is opened. Select "I already have an account" and enter your registered email address and password to sign in.

Editing My Profile
Your CareTeam profile can be edited at any time to ensure the most current contact and career information are being displayed.

1) From the Main Menu, select "My Profile".

2) Tap the "Edit" button at the top, right of the screen.

3) Scroll down to see all of the editable fields and tap on one to begin editing.

4) Tap on your profile picture to remove or replace it with a new image.

Invitations
If a team leader decides to add you to their CareTeam, you will receive an alert notifying of a new, pending invitation.

1) On the alert window, tap "Ignore" to close the alert or "View" to see the invitation details.

2) You will see a list of any pending invitations. Tap ✓ to accept the invitation, or ✗ to decline.

3) Confirm your decision to accept or decline.

4) If you accepted the request, you will need to tap "OK" on the "Update Directory" notification in order for your new CareTeam connection to be listed.
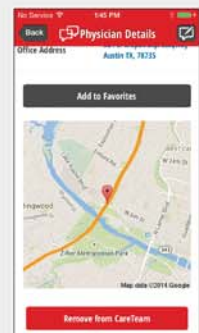
Viewing Your CareTeam
With CareTeam, you can securely communicate with any DocbookMD member who has invited you, along with their other CareTeam members.

1) From the Main Menu, select "Directory". This will list all of your CareTeam leaders.

2) Tap on a member's profile to view their details and to see their other CareTeam members.

3) To initiate a message to a member of your CareTeam, see "Messaging" (pg 6).

Favoriting or Removing

1) To add a DocbookMD member to your favorites, you can simply tap on their thumbnail image until a star appears in the lower right corner, OR select their profile, scroll down to below the contact information, and tap "Add to Favorites". Your starred favorites will be listed under the "Favorites" tab in the Main Menu for easy access.

2) To remove yourself from a CareTeam, select the team leader's profile, scroll down to below the contact information, and tap "Remove from CareTeam". You must then confirm your decision by tapping "yes" on the "Confirm Action" notification.

docbook*MD*

Simplify your communication and minimize risks.

Available on the iPhone **App Store**

ANDROID APP ON **Google play**

PC and Mac Access **docbookmd.com**