ABELMed

Portal
Configuration Guide

ABELMed Inc.
ABEL Medical Software and Services

Table of Contents

Before you Configure Portal

The following requirements must be met by your office before Portal Setup can begin. Your IT representative will most likely be necessary to perform several of these tasks.

Server Requirements

Prior to installing, you should exclude the Portal Administration .exe file from any anti-virus program you have running to prevent it from being blocked.

1 You must be running ABELMed version 12.18 or higher on the Server and Microsoft SQL Server 2008 or higher.

2 Your office must have **Internet** access from your Server (Internet is only required on the Server, not every machine that will use Portal).

3 Your Server must have a non-changing IP Address. This can be done by either:

   a. Making the server's IP address static, OR

   b. Subscribe to a DNS service that will resolve the dynamic IP address to a human-recognizable name (e.g. - the dynamic IP address will always resolve to myoffice.dyndns.org.

4 Make sure **port 1506** is opened for inbound and outbound data transfer. See "Step 1 - Test Port Forwarding" on page 9

5 If your office is using a router, you must setup port forwarding on the router to access the office's server. Port **1506** is the default port used for communication between the office's server and the portal. *If you wish to change the port number, please contact your ABELMed Portal Implementation Specialist.

6 Make sure the Internet Time for your office is set to automatically synchronize with **time.windows.com.**

Portal Requirements

1 A privately registered email domain must be used to send your emails.

- This privately registered and owned email domain must be configured with specific authentication settings. This is required to verify ownership of your sending domain so that emails can be sent from ABELMed Portal with a high deliverability and reputation rate. The email address reception**@streetmedical.com** is an example of a privately registered email domain.

- You may already own a privately registered domain if you have your own practice website, such as www.streetdental.com.

  IMPORTANT: ABELMed Portal integrated email service does not support Public Email Domains such as gmail.com, yahoo.com, bellnet.ca, rogers.com. The email address streetmedical@*gmail.com* is an example of a public email domain.

2 Choose the **Sending Email Address** from your registered domain that you will be using to send emails to your patients.

  If you do not own a registered domain (or do not have a practice website), contact your IT/Computer Service Provider to assist you with purchasing a domain name and configuring a new email address for your practice. (Domains can be easily purchased at very low cost, $10 -$50 per year, from sources such as **10dollar.ca** or **GoDaddy.com**, etc.)

3 Perform the following instructions located at this link to configure your domain authentication settings: How to Setup SPF and DKIM for Your Sending Domains.

4   Using the integrated email settings along with a registered email domain will benefit from authentication leading to improved email deliverability. Article on <u>Why email authentication is a good thing</u>.

5   Choose a sub-domain name for your portal.

For simplicity sake, the sub-domain name is often similar to your office's website name. For example, if your website domain is **www.streetmedical.com**, then you might name your domain **www.streetmedical.abelportal.com**.

6   If you have a business logo and want it to appear on your portal website and on emails sent to your patients, provide the following:

- Two (2) logo image files, e.g. one banner image for the website and one image for the email.

- The images must be in *.PNG format*.

- The maximum allowable size for the email image is *400 pixels* (width) x *160 pixels* (height).

- The maximum allowable size for the banner is *800 pixels* (width) x *250 pixels* (height)

Patient Visit Summary Feature Requirements

This portal feature allows you to send a summary of a patient's visit to their portal account. If you plan on using this feature, please follow the steps below:

1   A Windows user account must be logged in on the office's server at all times.

2   Modify Microsoft Word application DCOM configuration settings as follows:

  a. Click the Windows **Start** button and choose **Run.** Type "dcomcnfg" and then press Enter.

  b. Expand **Component Services -> Computers -> My Computer -> DCOM Confi**g

  c. Locate the Microsoft Office Word application. The name may vary depending on which version you have installed.

  d. If you can't locate the application by name, try locating it by Application ID. It should be {00020906-0000-0000-C000-000000000046}. If you cannot find it at all, go to step 3.

  e. Right click on the Word application and choose **Properties.**

f. Select the Security tab and verify that the **Use Default Access Permissions** and **Use Default Launch Permissions** are selected.

g. Select the **Identity** tab and change the user account to The Interactive User. Click **Apply** and **OK**.

Note: Only perform the next step if you could not complete step 2(d) on the previous page.

3 Change the Microsoft Word application DCOM configuration settings 32 bit as follows:

a. Click the Windows **Start** button and choose **Run**. Type "mmc -32" and press **Enter**.

b. On the 'Console1 - [Console Root]' window, click **File -> Add/Remove Snap-in.**

c. Select **Component Services** from the 'Available snap-ins' list on the left and add it to the 'Selected snap-ins' list.

d. Perform the steps shown in Step 2 on the previous page (except 2d).

e. Exit the console.

Register with MyABEL

The files required to install ABELMed Portal are located on our MyABEL website. In order to access these files you must have a MyABEL account.

■ **To Register:**

1 Log on to **www.myabel.com.**

2 Click **MyABEL Registration.**

3 Complete the registration form and fax it to us at **866-337-5558** or email it to **registration@myabel.com**.

A temporary account password will be emailed to you.

Configuring Portal

Follow carefully each of the steps outlined in this section to successfully configure portal.

Step 1 - Test Port Forwarding

You can use free services offered on the web to determine if a port is opened by following the steps below:

Important: Portal configuration should be completed by your IT representative.

■ **To Test Port Forwarding with Shields Up:**

1   Open a web browser and navigate to www.grc.com.

2   Click "Services" and choose "ShieldsUP!"

3   Click the **Proceed** button and then type "1506" in the text box

Firewall: Portal 1506 must be opened to allow portal to communicate with the server at ABEL.

4   Click the **User Specified Custom Port Probe** button.

5   If the **Status** column shows **Stealth**, the port is NOT OPEN which is not what you want.

6   If the **Status** column shows **Open!**, the port IS OPEN and you can proceed with the ABELMed Portal installation.

Step 2 - Enter Client ID/Sub-Domain Name

Once you've installed Portal Administration, the first step is to enter your Client ID and your new sub-domain name See "Portal Requirements" on page 5 for a description of sub-domain.

■ **To Enter the Client ID and Sub-Domain Name**

1 On the ABELPortal window, click the **Settings** button.

The **Settings** window appears.

2 Click the ✏ icon beside **Client ID**.

3 Type your **Client ID** as shown in **Setup > System Setup** in ABELMed.

4 Click the ✏ icon beside **Website Address.**

5 Type your sub-domain name in the **Website Address https://** field. See "Portal Requirements" on page 5.

Step 3 - Configure your Email Account

You can send emails to your patients using ABELMed's integrated email service, or your own SMTP email server.

IMPORTANT: Instructions for both methods are shown in this section; however, we strongly recommend that you use ABELMed's integrated email service.

Using ABELMed's Integrated Email Service

1   On the **Settings** window in Portal Administration, click **Configure Email Settings.**

2   The **Email Server Configuration** window appears.

Important: Mandrill Integration operates in the background and will not affect how you manage your appointment confirmation and reminder emails in ABELMed Portal

3   Type the **Sending Email Address** you are going to use to send emails to your patients. Normally, this would be your office email address, but not necessarily.

4   Click **Use Mandrill Integration**, the integrated email service used by ABELMed. The remaining fields are now inactive and no further configuration is required.

5   Click **Save** to activate the service.

Using your SMTP Email Server

■ To Configure:

1   Click **Settings** on the ABELPortal main window.

The **Settings** dialog appears.

2   Click **Configure Email Settings**.

*The email settings required for ABELMed Portal can be found by opening Microsoft Outlook and clicking the **Change** button under **File > Account Settings** or in a similar location if using a different email program.*

3   Type your **Sending Email Address**.

4   Type the name of your email **Host** server.

5   Type the **Port** number the server uses to transmit and receive emails.

6   Type the **Username** and **Password** that will be used to log on to email.

7   If the email server resides on a **Domain**, type the domain name.

8   Click the **Enable SSL** check box to secure the Username and Password.

9   To test the connection, click **Test SMTP Connection.**

10   Click **Save**.

Step 4 - Activate Portal

Once you have Portal configured, the next step is to contact us using either of the following methods:

- Email the information below to **medsupp@abelhealthgroup.com** with **Attn: ABELMed Portal Setup** in the **Subject** line.

  - Your Customer ID

  - Your Clinic Name

  - Your telephone number

  - Your DNS name or static IP address

  - Your chosen website sub-domain name

  - Y o u r Private Domain Email (for sending emails to patients)

  - Your banner and email logo images as an attachment

- A support representative will finalize your ABELMed Portal setup and contact you to proceed with testing.

Testing Portal

Once you've submitted your Portal configuration information to ABEL, an ABEL support representative will review the information and then send you an email confirming Portal has been activated. You can then proceed with the following testing steps.

Step 1 - Create a Test Patient

1   Click **File > New Patient**.

2   Enter a fictional **First Name, Last Name and Birthdate.**

3   Enter your own **Mobile** phone number and **Email** address.

4   Click the **Contact Settings** button.

The **Edit Contact Permission** dialog appears.

5   Depending on what the patient has agreed to, move through and check/uncheck the following options:

- **Allow Appointment Reminders** if they agree to receive email reminders.
- Allow **News & Promo** if they agree to receive news and promotional emails from your practice.

6   Click **OK**.

Step 2 - Generate a Portal Key

In order to register for ABELMed Portal, your patients will require a Portal Key number. This number can be generated by anyone in your office and is used as a security feature to protect the confidentiality of patient health information.

Only generate one key number for a patient. If you generate a portal key number for a patient who already has one, the patient will be forced to re-register their account in ABELMed Portal.

■ To Generate a Portal Key Number:

1   Open the patient's record.

2   Click the **Personal** tab.

3   Click the **Portal Key Generator** button.

The **Generate Portal Key** dialog appears.

4   Click **Generate Portal Key**.

A dialog appears displaying the new Portal Key number.

5   Write down the number and forward it to the patient. They will need to enter this number in the Registration Key field in order to successfully register with ABELMed Portal.

Step 3 - Book an Appointment

1   Click **File > Schedule**.

2   Double-click in an open time slot for tomorrow's date.

The **Patient Selection** window appears.

3   Select the fictional user you added in step 1.

The **Appointment Edit** window appears.

4   Enter a **Work to Do**.

5   Click **OK**.

Step 3 - Launch Portal Administration

1   Click **Start > Programs > Portal Administration**.

The **ABEL Security** dialog appears.

2   Type the Administration Manager's **User ID** and **Password**.

3   Click **OK** to display the Portal Administration window.

Step 4 - Create a Rule

1   Click **Send Appointment Messages** in the middle of he screen.

2   Click **Appointment Rules** in the lower-left corner.

The **Appointment Rules** window appears.

3   Click **Add New Rule**.

The Add/Edit Appointment Rule dialog appears.

4   Click the down-arrow beside **Message Template** and select **Appointment Confirmation.**

5   Click **Save** twice.

6   Click **Close**

The Appointment Messages window appears.

Step 5 - Send the Appointment Confirmation

1 On the **Appointment Messages** window, select tomorrow's date in the **From** field.

2 Click **Refresh**.

3 Click on the **Appointment Confirmation** message template.

Notice that all appointments for the date shown are listed.

4 In the list, locate your fictional patient and check the box in the **Send Email** and the **Send SMS** column. Make sure you uncheck these columns beside the other appointments listed to avoid sending them confirmations.

5   Click **Send Message**.

The **Batch Report** window appears.

6   Click **Close**.

7   To confirm the appointment by email:

   a. Open the email program for the email address you used for the fictional patient.

   b. Look for the **Confirm Appointment** email.

   c. Click the **Confirm Appointment** button.

8   To confirm the appointment by text message:

   a. Open your smart phone and look for the **Confirm Appointment** text message.

b. Press the required character on your keypad to confirm the appointment.

The ABELPortal web page appears stating "Success, your appointment has been confirmed"

Now that the test patient has confirmed the appointment via email, it will appear in Portal Administration waiting your acceptance as shown in the next step.

9   Go to the **Portal Administration** main window and click the icon beside the appointment.

10   Go to **Scheduler** and verify that the appointment state for the appointment is "Confirmed".

Step 6 - Create a Portal Account for the Test Patient

Important: Before you can register your ABELMed Portal account, you must obtain an 8-character Registration Key from your medical office.

■ **To Create a New Account:**

1 Access the ABELPortal website.

Username

Password

Sign in

Forgot Password?

New to ABELPortal?

Register

2 Click **Register**.

3 Click **New User**.

The **Register Your Account** page appears (see following page).

4 Type your **First** and **Last Name**.

5   Type your **Email address**.

Register Your Account

* All fields are required.

First Name	John
Last Name	Doe
Email	jdoe@anywhere.comq
Birth Date	January
	31
	1986 (yyyy)
Username	john_doe
Password	••••••
Confirm Password	••••••
Registration Key	VY3ASQAN

Register

6   Enter your **Birth Date**:

a. Click the down-arrows and select the month and day you were born.

b. Delete the phrase "Enter Full Year" and then type the year you were born. Use the yyyy format (e.g. 1982)

7   Type a **Username** (must be at least 6 characters and can contain only letters and numbers, no special characters).

8   Type a **Password** (must be at least 7 characters).

9   Type your password again in the **Confirm Password** field.

10 Type the 8-character Registration Key given to you by your medical office. If you do not have one, contact their office and let them know you need one to sign on to ABELMed Portal.

11 Click **Register**.

The **Choose Your Security Questions and Answers** page appears.

Since ABELMed Portal contains confidential medical information you must complete three sets of security questions. The answers you provide will be used to identify you in the event you forget your password.

12 Click the down-arrow in the first set and choose one question from the list to answer.

13 Type the answer in the blank field provided.

14 If you do not like any of the questions listed, you can create your own question.

15 Select the **Choose your own security question option** in the list and type the question and then the answer as shown in the example below.

16 Repeat the above steps for each set of questions. It is recommended that you pick a different question for each set.

17 Once you've finished, click the **Submit** button to return to the **Sign In** page and exit.

Training

ABELMed Inc. strongly suggests you arrange internet-based training to configure your ABELMed Portal settings and features. On-site training is also available at an extra cost. **Once you've activated your Portal, an ABELMed representative will contact you to arrange training.**

Remember, unlike your ABELMed system in your office, ABELMed Portal will be used by your patients and you will be sending correspondence to them.

- You want the messages you send to be clear and comprehensive.

- You want your patients to have access to the features you want them to use and to not have access to the features you'd rather they not use.

Notes

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