# ABELMed

# Portal Configuration Guide



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This document contains or refers you to current information on using the features in ABELMed EHR–EMR / PM.

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# **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 <u>reception@streetmedical.com</u> 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 <u>streetmedical@gmail.com</u> 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: <u>How</u> 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 is400 *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 Config



- 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-C000-00000000046}. 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



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

- 1 Open a web browser and navigate to <u>www.grc.com</u>.
- 2 Click "Services" and choose "ShieldsUP!"



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



- 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.





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



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

## 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.

🕥 Settings	×
Client ID: 23423 Website Address: https://	testcaseson (belportal.com
Portal Settings Appointment	Health Information
City Map	Work To Do Map
Forms	Financial
Message Settings	
Message Templates	Email Server Configuration
	Close

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.



manage your appointment confirmation and reminder emails in ABELMed Portal

Sending Email	Address: demo@abelsoft.com
Use Mandri	ill Integration
O Use SMTP	
SMTP Setting	5
Host:	127.0.0.1
Port:	25
Username:	
Password:	
Domain:	
Enable SSL:	
You must ha your IT adm server.	ave access to an email server to use SMTP. Contact inistrator for assistance in configuring your mail
	Test SMTP Connection

- **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.

🖉 Email Server Configuration	×
Sending Email Address:	briann@abelsoft.com
Host:	192.168.99.18
Port:	25
Username:	abelsoft
Password:	
Domain:	
Enable SSL:	
Using an SMTP Server will allow y without any interruption. You mu to use SMTP. Contact your IT ad setting up the configuration. Test SMTP Connection	you to send multiple emails ust have access to an email server ministrator for assistance in Save Close

- 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.



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.

# 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.

Cover	Personal	Extra	Treat	ment Plan		Appointments	Services	Finan	cial
Type OHIP	✓ Health No.		Ver.	Prov. ON		Validate			
Alternate ID		USP /							
Patient Name				Personal Infor	matior	ı			
Mr/Mrs/Ms	Mr 🗸		_	Birth	Date	11/18/1992	Age:	22	
Last Name	Test			G	ender	Male	~		
First Name	Brianneale			Employment S	Status	Unknown	~		
Middle Name				Marital S	Status	Unknown	~		
Alt. Surname				Patient S	Status	Active	~		
Jr/Sr	·	Chang	e History	Status	Date		H.		
Mailing Address	6			Phone Number	ers			· · · · ·	
Street				E	Best #	Home v			
Apt / Box #				Home F	hone	(435)345-4342	Unlisted		
City, Prov	13 - Toronto, ON			Work F	Phone	(657)575-7556			
Postal Code	L4Z-4J5			Other F	hone	()-	Desc.		
Resides with				Mobile F	hone	(809)709-8080	]		
Relation	Householder v	Additional Ad	ddress	Providers					
Email				Provider	-		-	Primary Care	egiver
Confidential (	Contact Pref. Unspe	cified	~	Ref. Pl	hys.				
Settings				Ref. Phys. Ad	dress				
Roster	ing			Attending	Nam	e Ri	ole	CC? Ad	dress
Contac	te			Caregivers					
Contact	Settings Destal k	au Canaratan		Manage	<		111		
Contact	Settings	tey Generator		Nata					_
Declined Reai	Research/Health stry Participation	t Specified	~	Diagno	osis				
	Effective Date		THE		Note				
						L			

4 Click the **Contact Settings** button.

#### The Edit Contact Permission dialog appears.

🛃 Contact Settings	×
Email Settings Allow Appointment Reminders Allow News & Promo	Text Messaging Settings
	OK Cancel

- **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



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. 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.

- 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.

A	A	BELMe	d Portal	Admin	istratio	on		- 🗆 X
File Settings On Den	nand Mes	sages	Help					
Appointments	BE	EL		<i>1ec</i>	<i>d</i> ]	P0	rtc	al
	Mon	Tue	Wed	Thu	Ed	Sat 1	Sup	
Appointments	49	60	68	190	50	0	0	
Confirmed:	0	3	0	0	0	0	0	
Total Sent:	0	0	0	0	0	0	0	
Awaiting Reply:	0	0	0	0	0	0	0	
		Send	Appoir	ntmen	t Mess	ages		
				nvalid Te	xt Messa	age Resp	onses	6
─ Pending Change Requ	ests							Refresh

## 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.

Â						Appointme	ent Batch	
Messages will be sent immedi For instance, you may want to	ately acco increase	ording to the Appo the range if the of	intment Rules. In ffice is closed for	crease the data rang vacation.	e to send messages	for additional do	ıys.	
From: 31/Mar/2015 15	] To:	31/Mar/2015	15 Re	efresh				
Message Template	Appts	Appts w/ Email	Appts w/ SMS	Emails To Be Sent	SMS To Be Sent	Appt. Date	Batch Status	Date Sent
Appointment Confirmation	23	23	23	23	1	31/Mar/2015	Not Sent	
	_			815		002		

- 2 Click **Refresh**.
- **3** Click on the **Appointment Confirmation** message template.

Notice that all appointments for the date shown are listed.

A						Appoint	ment Me	essages					_ <b>_</b> X
Messages will be sent immed For instance, you may want t From: 29/Mar/2015	iately ac o increa:	cording to the App se the range if the <sub>D:</sub> 06/Apr/2015	ointment Rules. In office is closed for	crease the data rang vacation. efresh	e to send mes	sages for add	litional day	/5.					
Message Template	Appts	Appts w/ Emai	Appts w/ SMS	Emails To Be Sent	SMS To Be S	ent App	t. Date	Batch Status	Date Sent				2
Appointment Confirmation	27	27	27	27	0	30/N	far/2015	Not Sent					
Appointment Confirmation	23	23	23	23	1	31/N	far/2015	Not Sent					1
Appointment Confirmation	11	11	11	11	0	01/4	pr/2015	Not Sent					
Appointment Confirmation	22	22	22	22	0	02/4	pr/2015	Not Sent					
Appointment Confirmation	0	0	0	0	0	03/A	pr/2015	Not Sent					
Appointment Confirmation	1	1	1	1	1	04/4	pr/2015	Not Sent					
Appointment Confirmation	0	0	0	0	0	05/A	pr/2015	Not Sent					
Appointment Confirmation	5	5	5	5	0	06/A	pr/2015	Not Sent					
Appointment Confirmation	37	37	37	37	0	07/4	pr/2015	Not Sent					
Appointment Date Time≏ P	rovider	Patient Name	Appt. State	Email Address	Last Email	Email Status	Send E	mail Mobile I	hone Number	Last SMS	SMS Status	Send SMS	
04/Apr/2015 0:00AM	S	Test, Briannea	Unconfirmed	bneale@idirect.com				2	9059792241				
Appointment Rules													Send Messages

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.

25
17 C 16
Sent: 0
t: 0

- 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.

Dear Brian	
Your appointment is on	
TUESDAY 26FEB at	
1:10PM. Please reply with	
Y to confirm you are able	
to attend.	

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 ABELPo	rtal?
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**.

First Name	John	1
riistivanie	John	
Last Name	Doe	]
Email	jdoe@anywhere.comq	]
Birth Date	January	
	31	
	1986 (уууу)	
Username	john_doe	]
Password	•••••	]
onfirm Password	•••••	]
Registration Key	VY3ASQAN	0

#### **Register Your Account**

- 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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