eMedical – Clinic Administration

6. Clinic Administration Overview

This section of the user guide deals with the clinic administration functions related to the management of:

- clinic contact details, services offered and external service providers – see section **6.22 Manage my clinic**

- clinic staff – see section **6.3 Manage Staff**

- the 'Alert' settings so that the system best meets the needs of your clinic – see Section **6.4 Manage the Clinic Application Settings**

- clinics/specialists that your clinic may regularly refer clients to – see **section 6.5 External provider** list **list**

> **Note:** Only a user with the '**Clinic Administrator**' role can undertake the clinic administration tasks in eMedical. Accordingly, this section of the user guide assumes that you have a **Clinic Administrator** role. For backup purposes it is expected that each clinic will have two Clinic Administrators.

6.1 Clinic Administration Home Screen

When you logon to eMedical, your menu bar includes **Administration, eMedical Support** and **Contact Us** tabs with the **Staff list** screen displayed.

> **Note:** The menu bar will also include the **Clinic inbox** and **Case search** tabs if you also have a case management role (e.g. **Clerical (Medical)**).

The **Administration** tab includes the following menus:

The functions of each of the menu are covered in the following sections.

6.2   Manage my clinic

The **Manage my clinic** menu displays the **Manage clinic** screen.

In the **Manage clinic** screen a **Clinic Administrator** is able to view and/or update details about the clinic, including:

- **Clinic details** (e.g. **Website**, **Map link**, **Hours of operation**, clinic overview)
- **Contact channels** (e.g. clinic phone number, email, mailing address)
- Clinic time zone
- **Panel country status** (i.e. whether you are part of the Australian, US, Canadian and/or New Zealand panel physician network)
- **Services offered** (i.e. whether your clinic offers medical, radiology and/or other services, such as pathology)
- **External service providers** (i.e. other clinics/specialists that you regularly refer your clients to).

Note: Your clinic will be initially added in eMedical by the Department of Immigration and Border Protection (DIBP), Refugees and Citizenship Canada (IRCC), Immigration New

Zealand (INZ) and/or US Department of State (DOS). A number of fields in the Manage clinic screen will therefore already be populated with the data that was provided by your clinic during the initial registration of the clinic.

Clinic details

The clinic name will be entered into eMedical by DIBP/DOS/IRCC or INZ during the initial registration process and cannot be edited. Additional details about your clinic can be added in the remaining fields in this section to assist DIBP/DOS/IRCC/INZ when required to locate your clinic and/or review your clinic operations:

Step 1.   Enter **Website** details (a URL) if available.

Step 2.   Enter a **Map link** (a URL) if available.

Step 3.   Enter the clinic's **Hours of operation.**

Step 4.   Enter an **Overview** of the clinic (i.e. a brief description of services and location).

Note: If you wish to change the name of your clinic, you need to contact DIBP, DOS, IRCC and/or INZ to request that this be changed.

Panel country status

The Panel country status section is not editable. It is provided for information purposes only and displays the country panel networks that your clinic belongs to (i.e. DIBP, DOS, IRCC and/or INZ).

This section can be collapsed or expanded by clicking on the ⊘ icon or the ⊞ Expand all ⊟ Collapse all links.

World clock

The time zone will be set by DIBP/DOS/IRCC and/or INZ during the initial registration process. The time zone is required so that the above agencies can see your clinic's local time at a glance. It will also assist DIBP/DOS/IRCC and/or INZ when they are required to contact you. In eMedical the examination date and the calendar will match the selected time zone. It is therefore important that a correct time zone is selected for your clinic.

Step 5. Select the **Time zone** from the drop down list.

Step 6. Click the **Daylight savings** checkbox if your clinic is currently in daylight savings.

The system will calculate and display your **Current local time** based on the time zone and daylight savings responses.

Contact channels

Your clinic's contact details in eMedical must be recorded under '**Contact channels**'.

The staff at DIBP/DOS/IRCC and/or INZ will have previously set up the clinic with a business address and business phone number during the initial registration process in eMedical.

You, as Clinic Administrator may edit or delete the 'Contact channels', but the information displayed initially is that which was provided for registration.

Note: It is mandatory to advise DIBP/DOS/IRCC and/or INZ and obtain approval prior to changing the physical location of your clinic. Clinic location is a factor considered by DIBP/DOS/IRCC and /or INZ when deciding how many panel physicians and radiologists they require in a particular country.

Note: A **Primary** contact channel may not be deleted until a replacement **Primary** contact has been added (e.g. a business email listed as a **Primary** contact channel cannot be deleted unless an alternative email has been added as a **Primary** contact).

To add additional contact channels:

Step 7. Press the icon

The **Add/Edit Contact channel** window displays.

Step 8. Select the required **Channel type** from the drop down list (in this example we select **Address (Mailing)**).

Step 9. Enter the relevant address data

Step 10. Press the **Yes** radio button if this is the **Primary** contact

> **Note:** The **Primary contact** will default to **Yes** and you will not be able to edit it if this is the only contact channel of this type that you are recording.

Step 11. Enter additional relevant comments in the **Comments** field.

Step 12. Press the **Ok** button

The **Manage clinic** screen displays.

> **Note:** To add another **Contact channel** click on the ✚ icon again and follow steps 4 to 8 above.

The **Manage clinic** screen will display the newly added contact details in the **Contact channels** section. In addition, there are two icons now displayed for each record:

A pencil ✏ (for editing) and

A trash can 🗑 (for deleting)

Step 13. Press the **Save** button in the **Manage clinic** screen

A success message is displayed.

To edit the Contact channel details:

Step 14. Press the ✏ icon next to the **Contact channel** that you wish to edit

The relevant **Contact channel** data entry screen displays.

Step 15. Make the changes to all relevant fields.

Step 16. Press the **Save** button

The **Manage clinic** screen displays.

Step 17. Press the **Save** button in the **Manage clinic** screen
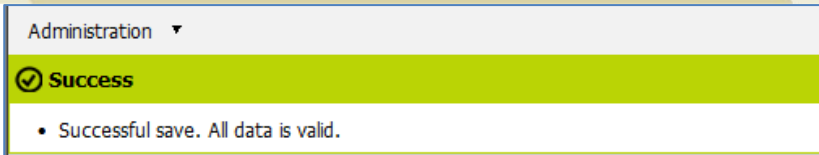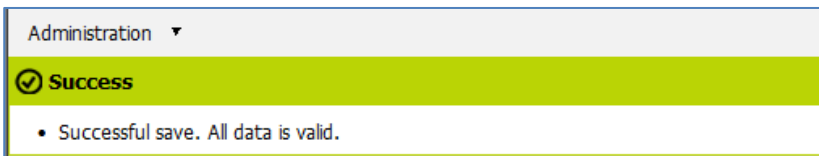
A success message is displayed.

To delete a Contact channel:

1. Press the 🗑icon next to the **Contact channel** that you wish to delete

A message displays.
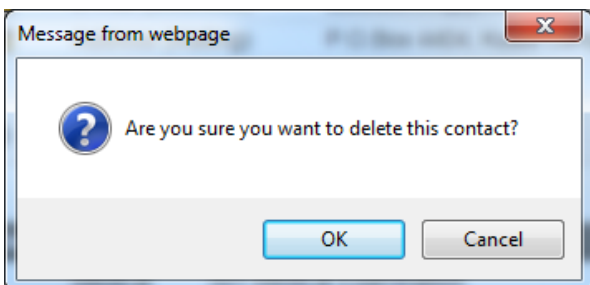
2. Press the **OK** button
3. Press the **Save** button

A success message is displayed.
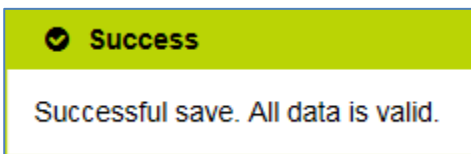
Services offered

There are two types of services in eMedical that a clinic can offer i.e. 'controlled' and or 'non-controlled' services.

The Medical and Radiology are described as 'controlled' services and your clinic must be approved by DIBP, DOS, IRCC and/or INZ to provide these.

All other services e.g. pathology, cardiology, etc. are described as 'non-controlled' services. As a **Clinic Administrator** for your clinic, you can add or delete any non-controlled services offered by your clinic without an approval of DIBP/DOS/IRCC and/or INZ.

The **Services offered** window displays a table that includes:

- The type of **Service** that your clinic provides (e.g. medical).

- **Exams included** which are the examinations your clinic can record in eMedical as part of this 'service' (e.g. **501 Medical Examination**).

- The date this service was **Added** to eMedical for your clinic, and

- **Subscribed panels** - which indicate the country for which you can provide this service (i.e. Australia, Canada, New Zealand and/or United States).

> **Note:** A flag for Australia, Canada, United States and an icon for New Zealand will display against a 'controlled' service if your clinic is approved to provide this service in relation to the health cases for these countries.
>
> **Note:** A country flag or icon is not displayed against a 'non-controlled' service, rather '**n/a**' is displayed.

Delete	Service	Exams included	Added	Subscribed panels
	Medical	501 Medical Examination 512 Limited medical Examination 711 Syphilis management information 901 Mini Mental Examination 902 Global Assessment of Functioning 903 Assessment of Activities of Daily Living 904 Chart of Early Child Development 948 Resettlement needs 949 Departure Health Check 950 Other 951 Vaccinations 952 Treatments / Medication	02 Jun 2017	🇦🇺 🇨🇦 NZ 🇺🇸
🗑	Pathology	601 Sputum smears and cultures 608 Await tuberculosis culture results 703 Repeat urinalysis 704 Serum Creatinine 707 HIV test 708 Hepatitis B test 712 Syphilis Test (VDRL or RPR) 713 Gonorrhea 715 Liver functions test 716 Hepatitis C test 717 HbA1C 718 Full blood count 719 TB Screening test - TST or IGRA 722 HIV Specialist report	17 Sep 2017	n/a
	Radiology	502 Chest X-ray Examination 503 Chest x-ray image 504 Posteroanterior (PA) chest x-ray 508 Posteroanterior (PA) chest x-ray 509 Lordotic chest x-ray examination 510 Lateral chest x-ray examination	02 Jun 2017	🇦🇺 🇨🇦 NZ 🇺🇸

> **Note:** If you add 'Medical' or 'Radiology' as a service that your clinic offers (e.g. when you were set up as a clinic you only offered Medial services but you now provide Radiology services as well), this service will display in the table. However, the country flag or an icon will only display when DIBP/DOS/IRCC/INZ have approved to offer this service.
>
> You should not add a new medical or radiology service without discussing the matter with DIBP, DOS, IRCC and/or INZ.

Note: You can add one or more 'non-controlled' services in eMedical that your clinic offers (e.g. pathology, cardiology, etc.). For example, if you perform blood tests such as HIV, Hepatitis B and C at your clinic, you should add the **Pathology** service.
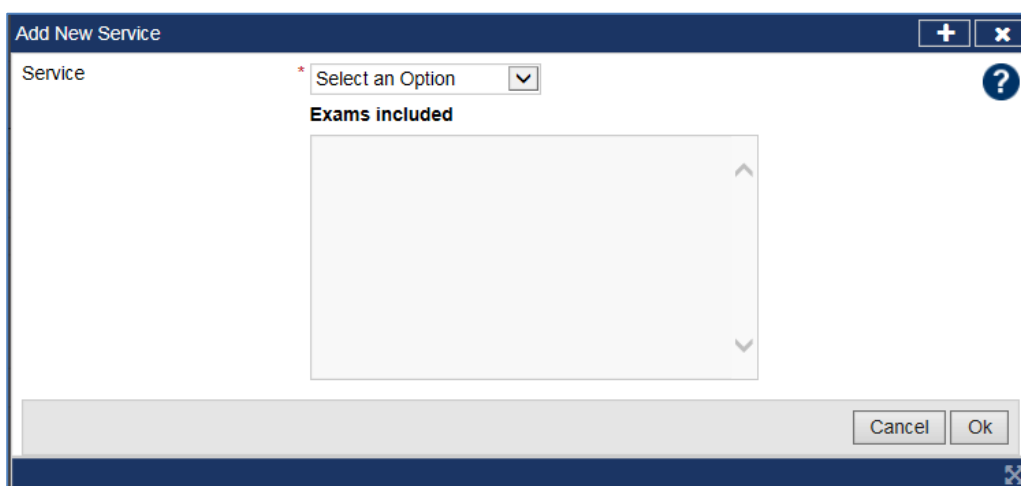
It is important that you add the services that your clinic provides so that:

- you can record the results of health examinations linked to this service in eMedical without being required to 'refer' the exam to another clinic/specialist (i.e. you can record that they were performed 'in house'); and

- your clinic is listed in eMedical as providing this service, therefore other clinics in your country that perform health examinations for DIBP/IRCC/INZ/DOS may refer clients to you.
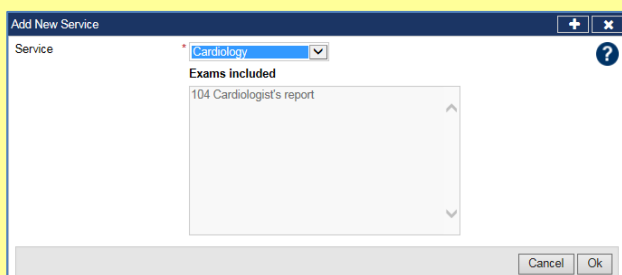
To add a new service:

Step 18. In the **Services offered** section, click the ➕ icon.

The **Add New Service** window displays.

Step 19. Select the **Service** from the drop down list.

Note: For each **Service** that you select, the exams required as part of that **Service** are displayed in **Exams included** box below it.
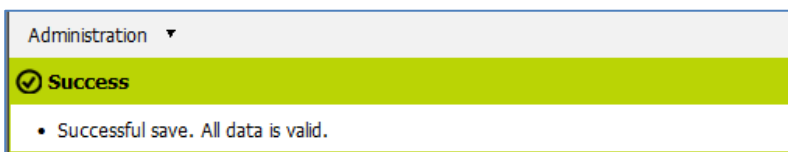

Step 20. Press the **Ok** button

The **Manage clinic** screen displays the non-controlled service(s) added in the **Services offered** section.

Services offered

Delete	Service	Exams included	Added	Subscribed panels
	Medical	501 Medical Examination 512 Limited medical Examination 711 Syphilis management information 901 Mini Mental Examination 902 Global Assessment of Functioning 903 Assessment of Activities of Daily Living 904 Chart of Early Child Development 948 Resettlement needs 949 Departure Health Check 950 Other 951 Vaccinations 952 Treatments / Medication	28 Aug 2014	🇦🇺 🇨🇦 NZ
🗑	Pathology	601 Sputum smears and cultures 608 Await tuberculosis culture results 703 Repeat urinalysis 704 Serum Creatinine 707 HIV test 708 Hepatitis B test 712 Syphilis Test (VDRL or RPR) 715 Liver functions test 716 Hepatitis C test 717 HbA1C 718 Full blood count 719 TB Screening test - TST or IGRA 722 HIV Specialist report	28 Aug 2014	n/a
	Radiology	502 Chest X-ray Examination 503 Chest x-ray image 504 Posteroanterior (PA) chest x-ray 508 Posteroanterior (PA) chest x-ray 509 Lordotic chest x-ray examination 510 Lateral chest x-ray examination	28 Aug 2014	🇦🇺 🇨🇦 NZ
🗑	Cardiology	104 Cardiologist's report	02 Nov 2016	n/a

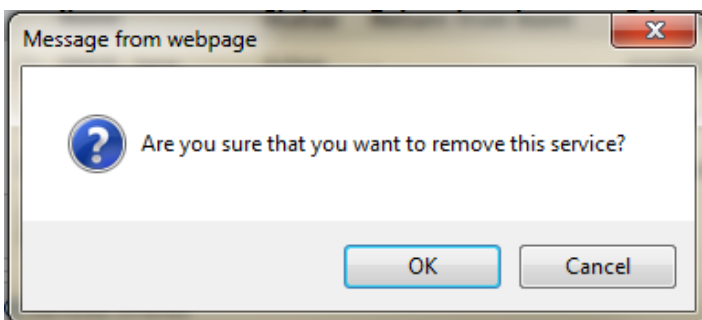**Step 21.** Press the **Save** button in the **Manage clinic** screen

A success message is displayed.

Administration ▼

⊘ **Success**

- Successful save. All data is valid.

To delete a service

1. Press the 🗑 icon next to the service you want to delete

A **Warning** window displays.

Message from webpage   ☒

❓ Are you sure that you want to remove this service?

OK   Cancel

2. Press the **OK** button

> **Note:** If you have been approved to provide Medical or Radiology services for Australian, Canadian, New Zealand and/or United States, you will be unable to delete this service and you will need to contact DIBP, DOS, IRCC and/or INZ.

3. Press the **Save** button in the **Manage clinic** screen
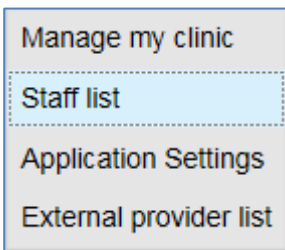
A suc**ess** message is **displayed.**

Administration ▼

⊘ Success

- Successful save. All data is valid.
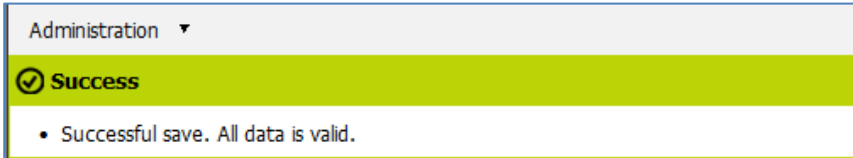
Manage external service providers

See **6.5 External provider list list** in this guide for detailed information.

6.3   Manage Staff list

The second menu item in the **Administration** tab is the **Staff list**.

Manage my clinic
Staff list
Application Settings
External provider list

> **Note:** The **Staff list** will always display after login if **Clinic Administrator** is the only role given to you.

Selecting the **Staff list** menu displays the list of a clinic's staff and their panel-related details.

Staff list

This table is filtered to show: 'All statuses' and 'All roles'

Name	User ID	Start	Engagement status	Role(s)	Panel(s)
○ Dr Flynn CHUN	e19852	18 Nov 2016	Active engagement	Doctor	🇦🇺 🇨🇦 NZ 🇺🇸
○ Ms Jessica COLLINS	-	11 Nov 2016	Account Activation Pending	Clerical (Radiology)	n/a
Dr Jack DONALD	e19525	01 Dec 2016	Engagement ended 02 Dec 2016	Doctor	
○ Dr John FLETCHER	-	31 Oct 2016	Account Activation Pending	Doctor	🇦🇺 🇨🇦 NZ 🇺🇸
○ Dr Lee FLYNN	e19857	24 Oct 2016	Active engagement	Radiologist	🇦🇺 🇨🇦 NZ 🇺🇸
○ Mr Joe FRANKLIN	e19855	24 Oct 2016	Account Suspended	Clerical (Medical)	n/a
				Clerical (Radiology)	n/a

1 - 10 of 24 results   Page 1 ☑   «   ‹   ›   »

Edit Engagement

You can use the ⌻ icon next to the **Engagement status** or **Roles(s)** to only see the staff members who match a particular criteria.

Staff list

This table is filtered to show: 'All statuses' and 'All roles'

Name	User ID	Start	Engagement status	Role(s)	Panel(s)
○ Dr Flynn CHUN	e19852	18 Nov 2016	Active engagement	Doctor	🇦🇺 🇨🇦 NZ 🇺🇸
○ Ms Jessica COLLINS	-	11 Nov 2016	Account Activation F	Clerical (Radiology)	n/a
Dr Jack DONALD	e19525	01 Dec 2016	Engagement ended	Doctor	
○ Dr John FLETCHER	-	31 Oct 2016	Account Activation F		🇦🇺 🇨🇦 NZ 🇺🇸
○ Dr Lee FLYNN	e19857	24 Oct 2016	Active engagement		🇦🇺 🇨🇦 NZ
○ Mr Joe FRANKLIN	e19855	24 Oct 2016	Account Suspended		n/a n/a

Engagement status filter menu:
- All statuses
- Engagement pending
- Currently engaged staff ▸
  - All currently engaged staff
  - Account Activation Pending
  - Account Activation Failed
  - Account Suspended
  - Account due to expire
  - Account Expired
- Engagement ended
- Account De-activated

Edit Engagement

The **Clinic Administrator** will use the **Staff list** screen to:

- Add a new person (staff member) to eMedical – section **6.3.1**
- Edit Person to make changes to a staff member's details – section **6.3.2**
- Mange staff member's eMedical access – section **6.3.3** that includes:
  - Unlock a staff member's eMedical access.
  - Allocate a temporary password to a staff member.
  - Un-suspend a staff member's account.
  - Resend an account activation email to a new person.
  - Extend a staff member's account expiry date.
- Cease/end a staff member's engagement with the clinic – section **6.3.4**

6.3.1 Add a new person

To add a new person (eMedical user) to your clinic in eMedical:

Step 1.   Press the 🞤 icon on the **Staff list** screen

Staff list

This table is filtered to show: 'All statuses' and 'All roles'

Name	User ID	Start	Engagement status	Role(s)	Panel(s)
○ Dr Flynn CHUN	e19852	18 Nov 2016	Active engagement	Doctor	🇦🇺 🇨🇦 NZ 🇺🇸
○ Ms Jessica COLLINS	-	11 Nov 2016	Account Activation Pending	Clerical (Radiology)	n/a
Dr Jack DONALD	e19525	01 Dec 2016	Engagement ended 02 Dec 2016	Doctor	
○ Dr John FLETCHER	-	31 Oct 2016	Account Activation Pending	Doctor	🇦🇺 🇨🇦 NZ 🇺🇸
○ Dr Lee FLYNN	e19857	24 Oct 2016	Active engagement	Radiologist	🇦🇺 🇨🇦 NZ 🇺🇸
○ Mr Joe FRANKLIN	e19855	24 Oct 2016	Account Suspended	Clerical (Medical) Clerical (Radiology)	n/a n/a

The **Add new person** screen displays.

Add new person

Search

eMedical User ID (if known) [_____]

OR

Date of birth [_____] 📅

Reset   Search

Enter the staff member's **eMedical User ID (If known)** or **Date of birth** in the relevant fields

Note: You cannot add a person unless you have searched to ensure that they are not already in the system. This is to avoid creating multiple records for the same user.

Note: When searching using a **Date of birth**, if there are existing record(s) those will be listed with a warning message to avoid creating a duplicate person.

Step 2.   Press the **Search** button

If there are no people in the eMedical database with the **Date of birth** that you entered, the following screen is displayed.

Step 3.   Press the **Create new person** button

The **Add new person** screen displays.

Note: The **Date of birth** that you entered in the previous screen (Step 3 above) is displayed in the **Personal Details** section and can't be edited. In case the **Date of Birth** displayed is not correct then you must use the **Cancel** button to return to the **Staff list** screen and repeat Steps 1 to 3 above.

Step 4. Enter the remainder of the staff member's **Personal Details**

Note: Fields marked with a red asterisk * are mandatory. The minimum data entry for any person is **Title**, **Family name**, **Given name(s)**, **Gender**, **Date of birth** and **Languages spoken**.

Professional Details:

In this section, you can record the staff member's professional qualifications where relevant.

    a.   Select **Specialty** from the drop down list

    b.   Enter the name of the **Registration body** where relevant

Contact Channels:

In this section, you will add an email address for the new person.

Note: Each user must have at least a **Primary** email address recorded in eMedical. Greater detail on how to add **Contact channels** is provided in section 6.2 **Manage my clinic** of this user guide.

Step 5. Press the in **Contact Channels** section

The **Add/Edit Contact channel** window displays.

Step 6. Select the **Email (Business)** from the **Channel type** drop down list

Step 7. Enter a valid email address

> **Note:** The **Primary contact** will default to **Yes** if this is the first contact channel of this type that you are recording.

Step 8. Enter additional comments in the **Comments** field if required

Step 9. Press the **Ok** button

The **Add new person** screen displays.

> **Note:** To add another contact channel click on the ✚ icon again and follow Steps 3 to 7 above.

Clinic engagements:

In this section, you will 'link' the new person to your clinic and confirm which role they will be providing at your clinic (e.g. doctor, radiologist or clinic staff member).

Step 10. Press the **Add new engagement** button.

The **Manage Clinic Engagement** window displays.

The **Country** and **Clinic** will be pre-populated.

> **Note:** You must enter a date for the **End** field only if the person will be engaged for a known period e.g. if the person is a Locum.

If the new person is a locum doctor or radiologist:

1. Select the '*Yes*' radio button for **Locum**

The **Replacement for** field will display.

2. Select the appropriate name from the **Replacement for** drop down list.

> **Note:** Locum arrangements should be discussed with DIBP, IRCC, INZ and/or DOS prior to adding the locum as per existing arrangements.

Step 11. Press the ✚ icon

The **Role details** screen displays.

Step 12. Select a **Role** from the drop down list

Role details

Role	* [▾]	❓
Effective From	* 11 Nov 2016 📅	
Effective To	[ ] 📅	

Cancel   Ok

An explanation of the roles available in eMedical for clinic staff is provided in **Module 2 - section 2.5**

> **Note:** The **Effective To** date in the **Role details** window should only be recorded if the person will remain in this role for a limited time.

Step 13. Press the **Ok** button

The **Manage Clinic Engagement** screen displays.

Manage Clinic Engagement

Country	* MALAYSIA ▾	❓
Clinic	* CHS UAT Cambridge Hospital ▾	
Start	* 11 Nov 2016 📅	
End	[ ] 📅	
Locum	○ Yes ● No	
Default screen	Not set	

Assigned roles ➕

Role	Effective From	Effective To	Panel Status	Edit
Clerical (Radiology)	11 Nov 2016	-	n/a	✏️

Cancel   Ok

> Note: **If the new person's role is a** Doctor or Radiologist**, an information message in the** Mange Clinic Engagement **screen will display:**
>
> **Manage Clinic Engagement**
>
> ❶ **Information**
>
> You have allocated a doctor/radiologist role in eMedical to this user. Please note that their status will remain as 'pending' until they are 'panelled' and/or 'activated' by the relevant government agency. Please contact the relevant government agency to check if you will need to provide any information before the doctor/radiologist can be panelled and/or activated. Until then, they should not examine any clients as a doctor/radiologist as they will not be able to grade and submit a case in eMedical. They will be notified once they have been panelled and/or activated by email and the 'flag' in eMedical for the relevant country will appear in colour.
>
> **Note:** To add another role press the ➕ icon again and follow Steps 5 and 6 above.

Step 14. Press the **Ok** button

The **Add new person** screen displays the **Clinic name**, **Start** date, **Engagement status** and **Role(s)** in the **Clinic engagements** section.

Step 15. Press the **Save** button.

A success message is displayed.

The **Add new person** screen is changed to the **Edit person** screen with the **Account details** section displayed.

Step 16. Press the **Cancel** button

The **Staff list** screen displays with the new person's name added to the staff list.

Note: An account activation email is automatically sent to the newly added person to the email address registered in eMedical.

Note: If the new person is a **Doctor** or **Radiologist**, DIBP/DOS/IRCC/INZ must approve the service before the user can submit exams in eMedical. The relevant agency will be advised automatically (by email) when you add a new person with this role in eMedical.

6.3.2 Edit staff member's details

Step 17. Press on the name of the staff member in the **Staff list** that you want to amend

Staff list

This table is filtered to show: 'All currently engaged staff' and 'All roles'

	Name	User ID	Start	Engagement status	Role(s)	Panel(s)
○	Ms Jessica COLLINS	-	11 Nov 2016	Account Activation Pending	Clerical (Radiology)	n/a
○	Ms Jill FLETCHER	e19759	09 Aug 2016	Active engagement	Radiology Support	n/a
○	Dr John FLETCHER	-	31 Oct 2016	Account Activation Pending	Doctor	NZ
○	Dr Lee FLYNN	e19857	24 Oct 2016	Active engagement	Radiologist	NZ
○	Mr Joe FRANKLIN	e19855	24 Oct 2016	Active engagement	Clerical (Medical)	n/a
○	Ms Suzi HEDRICK	e19762	29 Aug 2016	Active engagement	Clerical (Medical)	n/a
○	Mr Alex RICHARD	e19534	02 Jun 2016	Active engagement	Clerical (Medical)	n/a
○	Mr Allen SANDERS	e19856	24 Oct 2016	Active engagement	Clinic Administrator	n/a
○	Dr Zeb SOHRAB	e19865	31 Oct 2016	Active engagement	Doctor	NZ
○	Dr Maria ZANG	e19858	24 Oct 2016	Active engagement	Doctor	NZ

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Edit Engagement

Note: You can use the **Engagement status** filter to show staff members who match particular criteria (e.g. staff who have account locked, account due to expire, a suspended account etc.).

The **Edit person** screen displays.

Personal Details:

Step 18. Enter changes to the staff member's **Personal Details.**
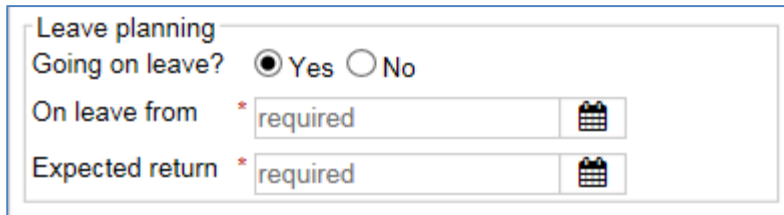
Note: You will need to contact DIBP/DOS/IRCC/INZ to make changes to the **Title, Family Name, Given name(s)** and/or **Date of birth** of staff members with a **Doctor**/**Radiologist** role.

Note: Languages spoken and **Specialty** can be added or deleted by using the ➕ and ➖ icons located next to those fields. Keeping these fields current enables clinic's administrative staff to advise a client about the best doctor for a health issue**.**

Step 19. Enter any changes to the staff member's **Professional Details**

Leave planning:

Step 20. Select the **Yes** radio button for **Going on leave**?

Step 21. Enter a date in the **On leave from** field

Step 22. Enter a date in the **Expected return** field
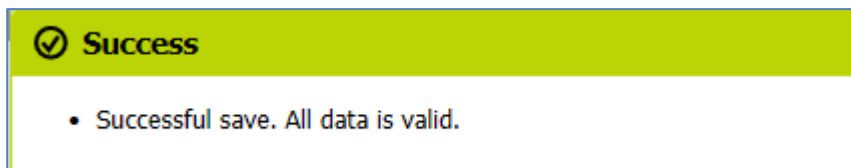
Note: Staff members will be unable to access eMedical before the **Expected return** date.

Contact channels:

Amend any details in the **Contact channels** (instructions are in Section 6.2 Manage clinic of this User Guide)

Step 23. Press the **Save** button after all the required changes have been made

A success message is displayed.

6.3.3 Managing a staff member's eMedical access:

In the **Staff list** screen you will be able to manage a staff member's eMedical access when a staff member:

    a. Has a locked out eMedical account

    b. Needs a temporary password

    c. Has a suspended eMedical account

    d. Has an eMedical account due to expire

    e. Needs an account activation email

a. Locked account:

A staff member's eMedical account will be locked after 5 logon attempts with incorrect details.

Note: A locked out user receives an automated email advising that their account has been locked. They can wait for 60 minutes to get their account automatically unlocked or contact their eMedical **Clinic Administrator** to unlock their account immediately.

Step 24. Press the staff member's name with the **Engagement status** of '**Account locked out**'

The **Edit person** screen displays.

Step 25. Press the **Unlock access** button

An information message is displayed.

> ⓘ **Information**
>
> - Access to this account has been unlocked. They have been sent an email with a link to reset their password.

The staff member will receive an automated email with a link to reset their password.

Note: The user's status will continue to display **Account locked out** until the user resets their password.

b. Allocate temporary password

The **Allocate temporary password** button is used if a staff member is unable to reset their password using the **Forgotten Password** self-service because they have forgotten the answer to their security questions.

Step 26. Press the staff member's name in the **Staff list** who requires a temporary password

The **Edit person** screen displays.

Step 27. Press the **Allocate temporary password** button

The **Allocate temporary password** window displays.

Step 28. Select the check box next to **I confirm that the user has requested this action**

Step 29. Type a temporary password in the **New password** and **Re-enter new Password** fields

Note: The temporary password you enter must be a minimum of 9 characters and must contain at least three of the following: lower case letters (a - z), upper case letters (A - Z), digits (0 – 9), punctuation and special characters (! @ $ # % ? & ! * = : .).

Step 30. Press the **Save** button

The user will receive an email advising that a temporary password has been set up and that they need to contact their clinic administrator to receive the password.

Step 31. Provide the user with their new temporary password.

Note: Please make sure that you do this verbally, the password should never be emailed for security reasons.

Note: Allocating a temporary password for a 'locked out' account will automatically unlock the user's account. The account status will then display as '**Account active**' and a success message will display.

c. Suspended Account

A staff member who has not used eMedical for more than 90 days (i.e. their account has been inactive) will have their account automatically suspended in line with IT Security requirements for DIBP, DOS, IRCC and INZ.

If a staff member's account is suspended and they are still engaged with the clinic:

Press the staff member's name with the **Engagement status** of '**Account Suspended**'

The **Edit person** screen displays.

Step 1. Press the **Re-activate** button

The **Change to active** window displays.

Step 2. Select a **Reason for change** from the drop down menu and enter some relevant information in the **Further details** text box

Step 3. Press the **Ok** button

The **Account status** is changed to **Account active** in the **Edit person** screen.

Step 4. Press the **Save** button.

A success message is displayed.

⊘ Success

- Successful save. All data is valid.

d. Extending Account expiry date:

The **Account expiry date** for an eMedical account is automatically set for two years from the date the staff member is added in eMedical. It is editable for shorter periods, such as for locum contracts or for staff who have ceased engagement with the clinic. Staff members must also have an **Active engagement** with an eMedical clinic to be able to access the system even if their account has not expired.

> **Note:** An automated email is sent to Clinic Administrator(s) 14 calendar days prior to the **Account expiry date**. If no action is taken and the **Account expiry date** is not extended, a follow-up automated email is sent to clinic administrator(s) 7 days and 2 days prior to this date.
>
> **Note:** If the **Account expiry date** lapses and no action have been taken by the **Clinic Administrator**, the staff member will not be able to access eMedical.
>
> **Note:** The Staff list will default to **'Account due to expire' and 'All roles'**. You may use the 🔽 for the **Engagement status** to look up for staff with 'All status' and 'All Roles'.

Step 5. Press on the name of the staff member with the **Engagement status** of '**Account due to expire**'

The **Edit person** screen for that user will open with the current expiry date displayed under the **Account details** section.

Step 6. Enter a new date in the **Account expiry date** field

Step 7. Press the **Save** button

A success message is displayed.

e. Resend Account activation

If a new user in your clinic did not receive their account activation email or it has expired (i.e., their status remains as **Account Activation Pending**), Clinic Administrators can resend the email.

Step 1. Press on the name of the staff member with the **Engagement status** of '**Account Activation Pending**'.

The **Edit person** screen displays.

Step 2. Press the **Resend account activation email** button

An information message is displayed.

6.3.4   End Role

A staff member may have more than one role. If they have changed roles but still engaged with the clinic and have active account then one or more of the roles can be ended. For example a user has a Clerical (Medical) and Clinic Administrator roles. If user is no longer required Clinic Administrator role then to end this role follow the steps below:

Step 1.   Select the radio button next to the staff member's name in the **Staff lis.**

Step 2.   Press the **Edit Engagement** button

The **Manage Clinic Engagement** screen displays.

Step 3.   Press the icon next to the role for example Clinic Administrator in the Roles section

The Role details window displays.

Step 4.   Enter or use icon to select a date in the **Effective to date** field (i.e. today's date or a future date).

Step 5.   Press the **Ok** button

The **Manage Clinic Engagement** screen will display with an **Effective to** date added next to the Clinic Administrator role.

Step 6. Press the **Ok** button

The **Edit person** screen will display with Clinic Administrator role removed in the Role(s) column.

Note: The ended role will continue to display if a future date was selected for the **Effective to** field and the role will disappear after the future date has past.

Step 7. Press the **Save** button

A success message is displayed.

Success

- Successful save. All data is valid.

6.3.4 End Engagement:

The Clinic Administrator must ensure that the **Staff list** of the clinic that they are responsible for is current. If a staff member is no longer using eMedical e.g. has left the clinic, then you must end their engagement with the clinic.

Step 1. Select the radio button next to the staff member's name in the **Staff list**

The **Manage Clinic Engagement** screen displays.

Step 2. Enter or use [calendar] icon to select a date in the **End** field on which the staff member will be ceasing work at your clinic (i.e. today's date or a future date)

Note: Once the **End** is reached, the staff member will be unable to access eMedical.

Step 3. Press the **Ok** button

The **Edit person** screen displays with the **Engagement ended** date under the **Engagement status.**

If the staff member does not have an **Active engagement** with any other clinic, then

Step 4.   Change the **Account expiry date** to today's date.

Step 5.   Press the **Save** button

A success message is displayed.
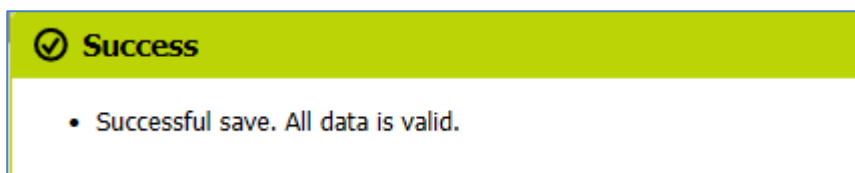
In the **Edit person** screen, the account status is changed to **Account Expired.**

Step 6.   Press the **Cancel** button to return to the **Staff list** screen**.**

6.4   Manage the Clinic Application Settings

The third menu item on the **Administration** tab is **Application Settings.**
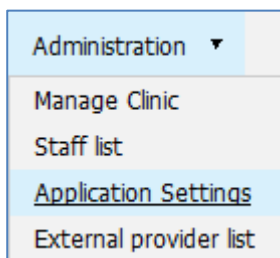
The **Application settings** menu allows the **Clinic Administrator** to activate the **Alerts tab** in the **Clinic inbox** for the management of the health cases which have been inactive for a certain number of days.
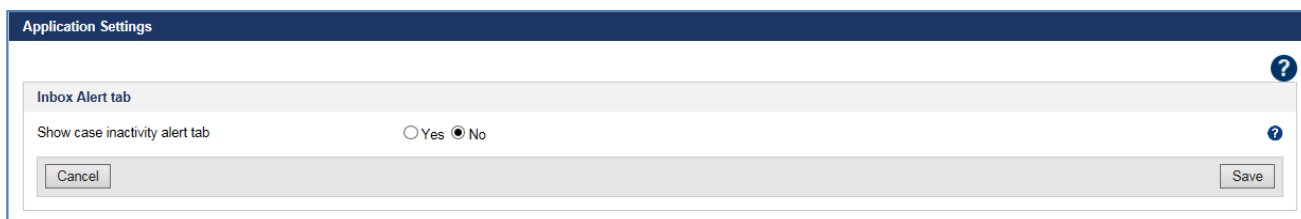
Note: The Application Settings will always default to **No** which means the **Alert** tab will not appear in the **Inbox** menu**.**

To activate the **Alert** tab:

Step 1.   Select the **Application Setting** menu

The **Application Settings** screen displays.
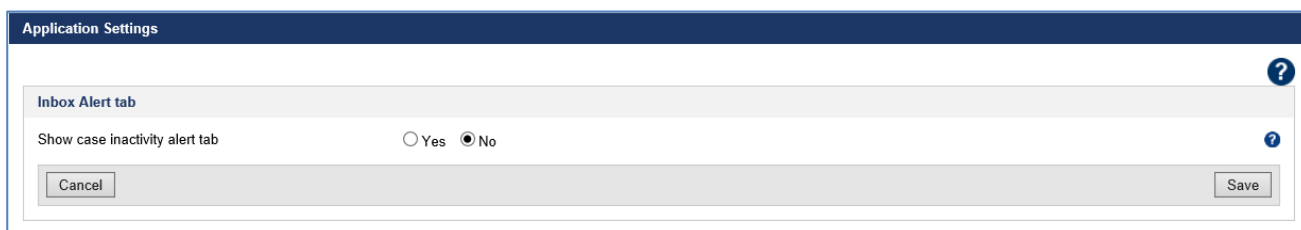
Step 2.   Select the **Yes** radio button for **Show case inactivity alert tab**

The **Add cases after** field is displayed.
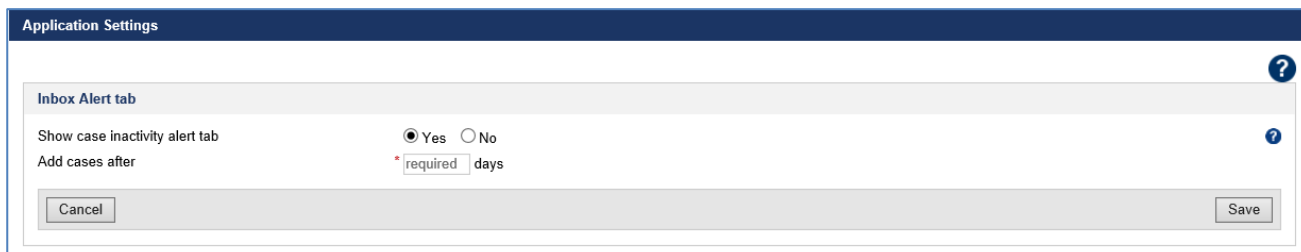
Step 3.   Enter the desired number of days in the **Add cases after** field

Step 4.   Press the **Save** button

A success message is displayed.

⊘ Success

- Successful save. All data is valid.

The **Alert** tab will be added in the **Inbox** menu bar and the health cases will start appearing here after the number of days selected in the **Application Settings** menu have been reached.

Inbox

| Pre-exam (5) | In progress (26) | Awaiting grading (3) | Alerts (24) | Returned (1) | Show all (33) |

6.5   External provider list

The fourth menu item on the **Administration** tab is the **External provider list**.

Administration ▾
Manage Clinic
Staff list
Application Settings
External provider list

The **External provider list** allows you to manage the external service providers for your clinic. These providers are specialist clinics that you refer clients to for the completion of additional health examinations required for their visa application. They are referred as the specialist examination(s) that are not conducted by your clinic.

Note: The external service provider clinics are not automatically linked to your clinic and must be linked before results for the specialist examination(s) can be recorded.

Selecting the **External provider list** menu displays the **Manage Links to External Service Providers** screen.

The **Linked Service Providers** section displays the clinic(s) that are currently linked to your clinic.

The **Unlinked Service Providers** section provides options to:

- search for existing service providers (clinics) offering the required service(s) and to link to your clinic (section **6.5.1)**; or

- add the required service to an existing clinic and link to your clinic; or

  create a new service provider (clinic) and link to your clinic.
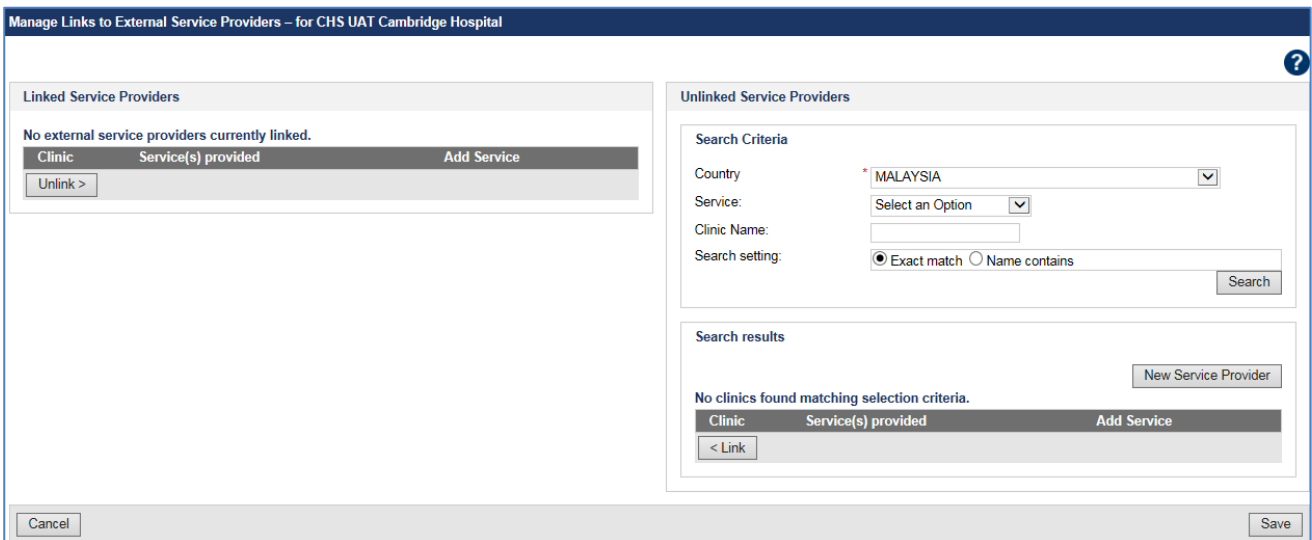
Note: The Clinic Administrator can also access this screen from the **Manage my clinic** menu to update this list (refer to Section 6.2 Manage my clinic).

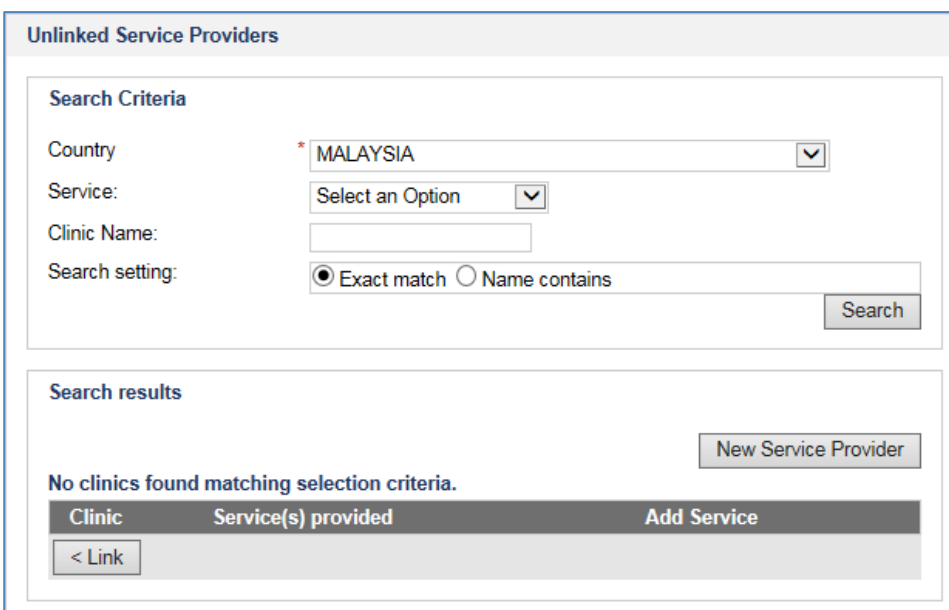### 6.5.1 Search and link an existing external service provider

Step 1.   Select the **External provider list** menu from the **Administration** tab.
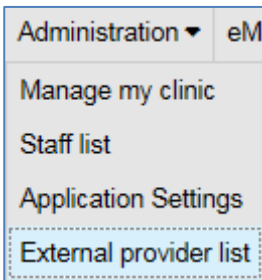
The **Manage Links to External Service Providers** screen displays.

Step 2.   Select a **Service** in the **Unlinked Service Providers** section.

.

> **Note:** To narrow down the search, you may enter clinic name in the **Clinic Name** field.
>
> **Note:** If you are using the **Clinic Name** field, we recommend that you select the **Name contains** option and enter a minimum of four letters of the clinic's name. Selecting the **Exact match** option may limit the search results as the text entered in the **Clinic Name** field would need to be <u>exactly</u> the same as the clinic name appearing in eMedical.

Step 3.   Press the **Search** button**.**

A list of clinics that meet the search criteria will appear under **Search results**.

Step 4.   Select the check box next to the clinic that you want to link.

Step 5.   Press the **<Link** button

The selected clinic (s) will be listed under the **Linked Service Providers** section.

Step 6.   Press the **Save** button**.**

A success message is displayed.

6.5.2   Adding additional service(s) to an unlinked external service provider clinic

If the external service provider clinic exists in eMedical but the service required to process a particular examination is not listed, then you can add additional services to this clinic before linking it.

> **Note:** You will not be able to add additional services to existing external service provider clinics that have medical and/or radiology services. For these clinics, you will need to contact DIBP, DOS, IRCC or INZ or the clinic directly and ask them to add the additional services.
>
>

Follow **Step 1.** to **Step 6.** under section **6.5.1** above

Step 7.   Press the **Add Service** link next to the clinic

The **Manage clinic** screen will display.

> **Note:** Use ![plus icon] icon to add additional **Contact channels** for this clinic where available.
>
> **Note:** The **Referring Clinics** section lists the clinics to which this clinic is linked to as an external service provider.

Step 8. Press the ![plus icon] icon under the **Services offered** section.

The **Add New Service** window displays.

Step 9. Select the service(s) that you wish to add from the drop down menu.

Step 10. Press the **Ok** button

The added service(s) will now be listed under the **Services offered** section.

Step 11. Press the **Save** button

A success message is displayed.

Step 12. Press the **Cancel** button

The clinic with newly added service will be listed under the **Linked Service Providers** section.

Step 13. Press the **Save** button

A success message is displayed.

⊘ **Success**

- Successful save. All data is valid.

6.5.2   Adding additional service(s) to the linked external service provider clinic

If the external service provider clinic is linked but the service required to process a particular examination in eMedical is not listed, then you can add additional services to the clinic.

> **Note:** You will not be able to add additional services to existing external service provider clinics that have medical and/or radiology services. For these clinics, you will need to contact DIBP, DOS, IRCC or INZ or the clinic directly and ask them to add the additional services.
>
> ⊗ **An error has occurred**
> - This clinic provides controlled services and you are not authorised to edit their details. Please contact your Network Administrator with any change requests.

Follow **Step 1.** to **Step 6.** under section **6.5.1** above

Step 7.   Select the **External provider list** menu in the **Administration** tab

The **Manage Links to External Service Providers** screen displays with the linked external service provider clinics listed under the **Linked Service Providers** section.

Step 8.   Press the **Add Service** link next to the clinic name.

Follow **Step 7.** to **Step 12.** under section **6.5.2** above.

The **Manage Links to External Service Providers** screen with the newly added service will display.

Step 9. Press the **Save** button**.**

A success message is displayed.

6.5.3 Creating a new external service provider

If you have not found the external service provider that you need to link to your clinic that you want to refer the applicant to, you will need to create one clinic.

> **Note:** You must not create a new external service provider clinic until you have searched for all the existing external service provider clinics in your country. This is to prevent the creation of duplicate clinics.
>
> **Note:** If there are multiple specialists located at one location (for example a hospital) then <u>DO NOT</u> create separate clinics for individual services/specialists. Instead add the required service(s) to the same clinic following the steps above under section **6.5.2**.

Follow **Step 1.** to **Step 3.** above under section **6.5.1**

> **Note:** You must leave the **Service**, **Clinic Name** and **Search setting** fields blank/unselected. This ensures that all clinics in a country that exist in eMedical are listed in the search results. Possibly the clinic may exist in eMedical under a different name or with different service(s) than the ones you are searching for. If you perform a search using additional fields, then the following error message will appear.

The list of all the clinics that exist in eMedical in your country will display.

Once you have ensured that the clinic that you are looking for is not listed then:

Step 4. Press the **New Service Provider** button

Th**e Add new clinic** screen displays.

Step 5. Enter the **Clinic name**

Step 6. Select the correct **Time zone**
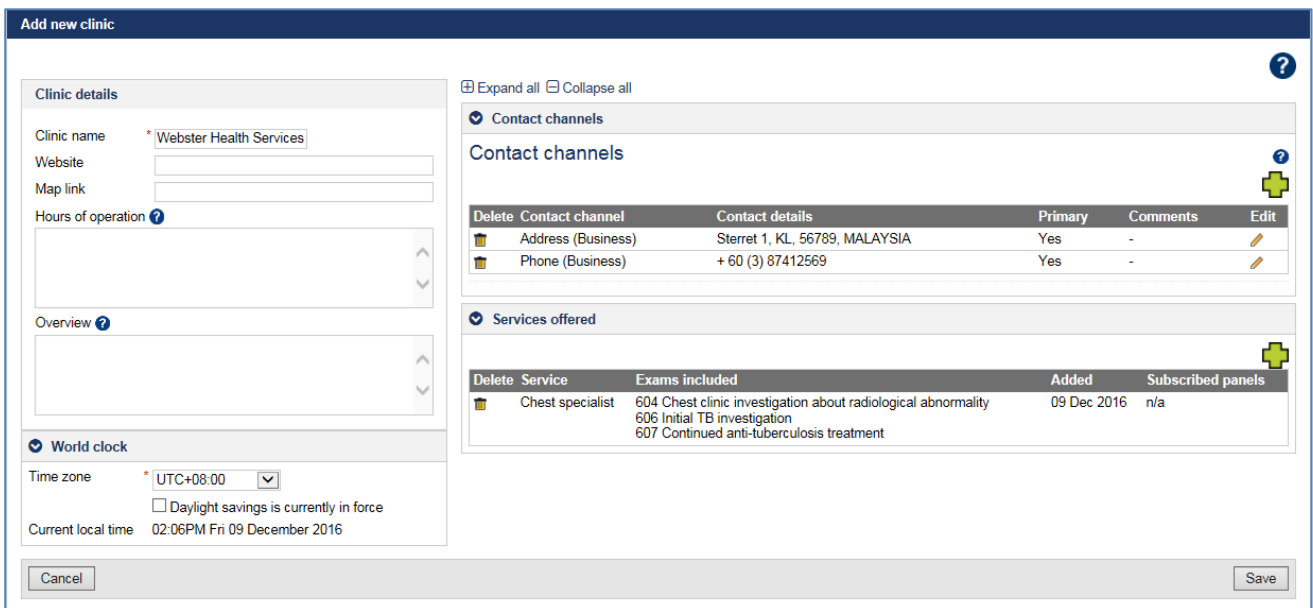
Step 7. In the **Contact channels** section enter the **Address (Business)** and the **Phone (Business)**
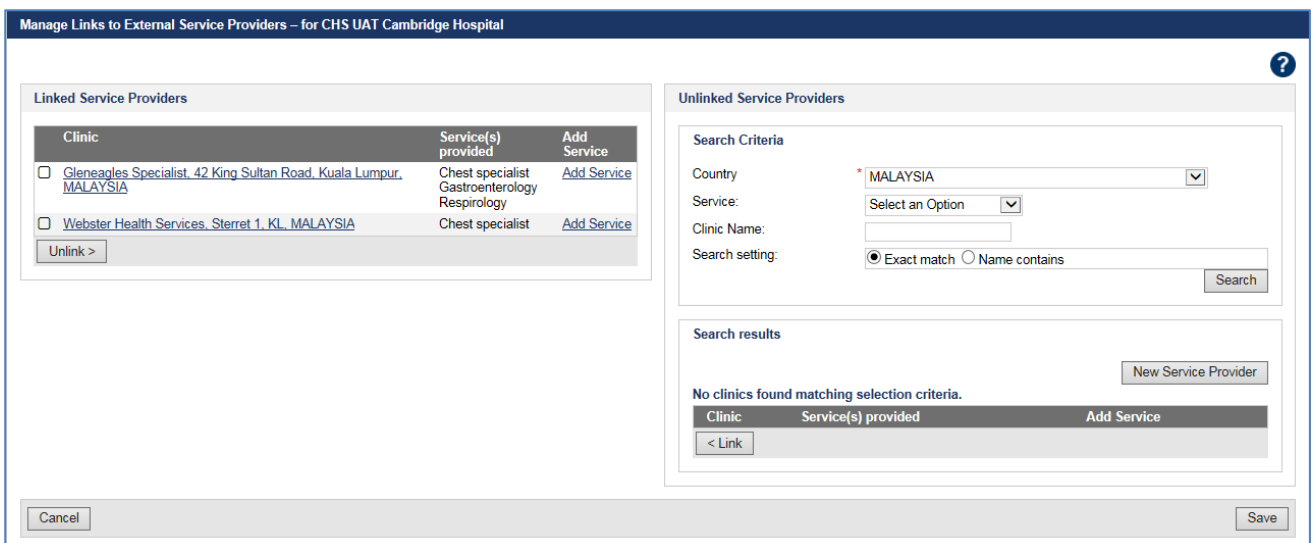
Step 8.   Press **Save**.

A success message is displayed.
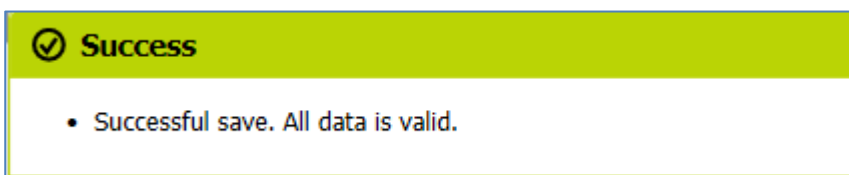
You have now created a new clinic.

Step 9.   Press **Cancel.**

The created clinic is now automatically added in the **Linked Service Providers** section.

Step 10.   Press the **Save** button

A success message is displayed.

Success

- Successful save. All data is valid.

Step 11. Press the **Cancel** button