



DASH360 Training Manual

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Version 21.1

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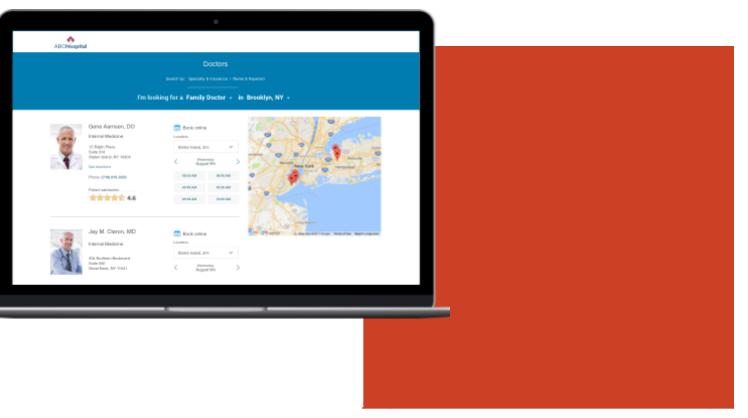
About this Manual

This manual provides instructions for using DASH360

End users can use this manual to learn what DASH360 is, how to use it, and how to troubleshoot issues with it.

This manual contains:

- Section 1, "Overview," describes what DASH360 is
- Section 2, "Using DASH360," shows schedulers how to access DASH360, how to add a new provider, and how to maintain an existing provider
- Section 3, "Troubleshooting and FAQs," explains how to seek support



SECTION 1

Overview

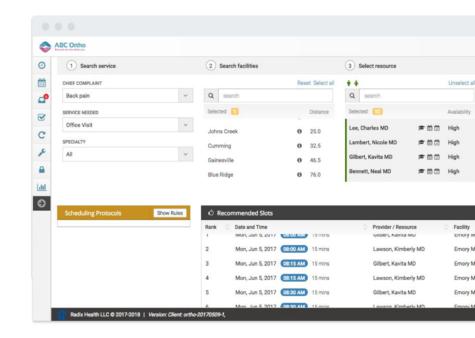
DASH360 is a new feature embedded into DASHcentral that provides a centralized view and platform for self maintenance of your provider data within DASHcentral and DASHself applications.

At a high level, DASH360 enables you to add, enable or disable providers, update specialties, visit reasons, preferences and provider data such as education, experience, memberships and affiliations.

This training manual will outline how to use DASH360 including best practice tips to guide you on the scenarios you can leverage DASH360 to coordinate provider updates. DASH360 is a first step in self service

capabilities to empower you to manage your provider data directly within DASH.

As you begin to manage your provider data using this new feature, there are still aspects of provider data management and DASH updates where you will need to engage the Radix Support Team. This manual will provide you with the information needed on how to use DASH360, in addition to the use cases of



when you still need to engage the Radix Team for provider related updates.

SECTION 2

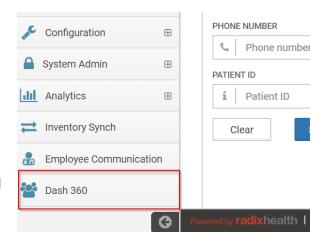
Using DASH360

Fine-tune the patient journey.

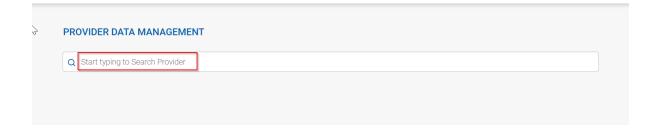
DASH360 supports enterprise customers in a manner that helps deliver the ultimate patient experience.

How to Access DASH360

- DASH is designed to be used with Google Chrome as the internet browser. Please ensure you are using the latest Chrome browser when using DASH.
- DASH360 can be accessed via DASHcentral or through a direct link provided by your Client Manager.



- You will be prompted for a username and password. Please enter your login credentials to log into DASH360. When you just start using DASH, we will set these up to match your EHR login credentials.
- 4. DASH360 can be found on the left hand menu within DASHcentral. Select the DASH 360 icon to access.
- 5. Start typing to search for a provider to get started:



General Tips & Guidelines

- DASH360 can be enabled for all providers that are onboarded within DASH Central or Self.
 It cannot be enabled or disabled for select providers.
- 2. In DASH360, specialty drives visit reasons for both DASH Central and Self. It links specialty to a specified list of visit reasons based on your current DASH environment.
- 3. Radix has developed a list of specialty and visit reasons currently configured in your DASH environment. Prior to the DASH360 launch, your Client Success Manager will share the list with you and your team for preview.
- 4. Visit reasons are assigned at the specialty level and are thereby automatically mapped at the individual provider level.
 - a. At the specialty level, DASH360 enables you to assign specific visit reasons to a specific specialty. Every provider that is mapped to a specialty, is thereby also mapped to the associated visit reasons within that specific specialty.
 - b. At the individual provider level, DASH360 provides a consolidated view of all visit reasons mapped to the individual provider (irrespective of specialty). For example, if Dr. Harris is mapped to both orthopedic and sports medicine specialties in DASH 360, in her individual provider profile, the assigned visit reasons to orthopedic and sports medicine specialty will automatically be mapped as well.
 - c. DASH360 enabled preferences, which include age and insurance exclusions cannot be attached to visit reasons.
- 5. The objective of triage questions in DASH are to guide the desired outcome of the recommended provider based on how the scheduler or patient responds to the triage

questions. While triage is not currently enabled to manage via DASH 360, it is important to understand how specialty updates made in DASH360 can potentially impact the output of your recommended provider in response to triage questions.

- a. If triage questions in your DASH environment are designed to filter by a specific specialty, after these questions have been answered, DASH will provide a recommended provider based on that appropriate specialty.
- b. In DASH 360, as you are adding or removing provider(s) to a specialty, please note that DASH will only recommend providers from the triage output that are mapped to both the specialty AND the selected visit reason
- c. If after you have completed provider specialty updates in DASH 360, and DASH is not displaying the recommended provider as expected, please check if the provider is mapped to both the specialty and visit reason selected.
- d. For example, at ABC Orthopedic Group, the orthopaedic and sports medicine specialties are both mapped to the visit reason of ankle pain.
 - i. Dr. Lily is a new sports medicine specialist to ABC Ortho that treats ankle pain. She is added to DASH360, mapped to the sports medicine specialty, with associated visit reason of ankle pain.
 - ii. Triage Questions designed in ABC Ortho DASH environment currently determine if the patient should be treated for ankle pain by the orthopaedic specialty.
 - iii. The triage will NOT populate Dr. Lily as she is only mapped to the visit reason of ankle pain, and not to orthopedic specialty. In order for triage to recommend Dr. Lily, she must be mapped to both the orthopedic specialty and the visit reason of ankle pain.
- 6. DASH360 enables management of provider preferences related to patient age and insurance exclusions.
 - a. Patient Age: DASH360 can apply patient age preferences for scenarios whereby a provider will only treat patients between a specified age range. It does not currently support management of complex combination age preferences such as "Dr. Lily does not treat patient ages above 40 with back pain"
 - b. Insurance Exclusions: DASH360 can apply insurance exclusion preferences to exclude patients with specific insurances. It does not currently support

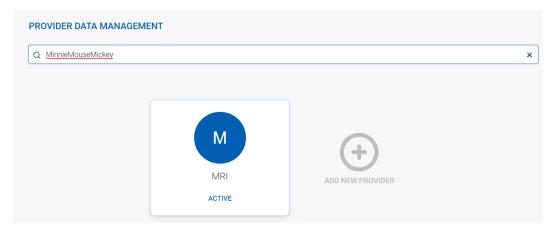
- management of complex combination insurance preferences such as maximum count rules, i.e. "Dr. Lily will only see 10 Medicare patients per day".
- c. Age and Insurance exclusions cannot be attached to visit reasons. These preferences must be assigned at the individual provider level.

How To Add a New Provider

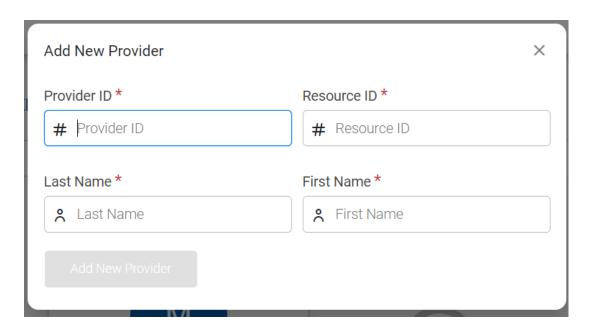
DASH360 enables you to add a new provider directly within DASH. You will also be able to enable or disable new providers in DASHcentral and/or DASHself. The following outlines the steps you will need to take in order to add a new provider to DASHcentral or DASHself using DASH360:

Prior to adding a new provider, you will need details from your Electronic Health Record System to include (Provider ID, Resource ID, Last Name, First Name). Please note that if any required fields are missing or left blank, you will not be able to complete the updates successfully.

- 1. Log in to DASH by entering valid credentials and navigating to DASH360
- 2. Search for the provider you are looking to add in the search bar
- 3. If provider is not found, click on the + sign to "Add New Provider"



4. Enter the basic provider details from EHR (Provider ID, Resource ID*, Last Name, First Name). Click on: "Add New Provider" to save details.



*Note: Resource ID should match provider ID unless the EHR has a defined resource ID that is separate from the provider ID, such as with NextGen EHR. For NextGen clients only: If you are adding a single provider with multiple schedules, please contact your Client Success Manager for additional guidance.

5. Add the detailed information of the Provider, by selecting to expand the following sections in the 'About' tab of DASH 360:



- a. Personal Information: Required fields are designated with a red *in the application:
 - i. Provider Picture: Users can edit or add the provider picture here. Select the pencil icon on the provider image to make the update. For DASH Self clients, this is the provider picture that will appear on your website, as patients search and select providers.
 - ii. Provider NPI: Enter provider NPI Number
 - iii. *Last Name, First Name: Enter Provider Last Name and First Name
 - iv. Summary: Enter provider summary information
 - v. *Display Name: Enter how the provider's name should display to patients and schedulers
 - vi. *Pronounce Name: This is how the name will be pronounced on voice calls to patients
 - vii. Language Spoken: Enter in languages spoken by provider (Optional)
 - viii. Provider Title: Enter the medical title for the provider
 - ix. Provider Prefix: Enter provider prefix, i.e. M.D., PA, etc.
 - x. Provider Heading: Enter provider heading to include summary of specialties and/or body parts treated. I.e. 'Sports Medicine Specialist, Shoulder, Elbow and Knee Surgeon. For Self clients, the information entered here will display on the Self website as outlined below:



Kowalsky, Marc MD

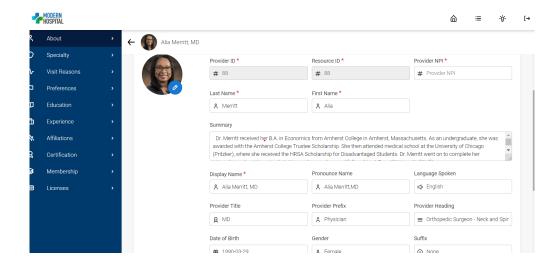
Sports Medicine Specialist, Shoulder, Elbow and Knee Surgeon

Greenwich Office, 771.9 mi. (2 more)

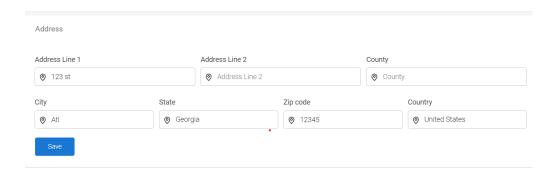
View Provider Details

- xi. Date of Birth: Enter provider Date of Birth
- xii. Gender: Enter provider gender

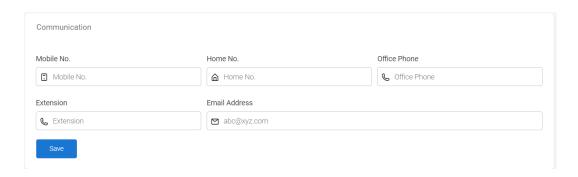
*Note: When making updates to provider name, please complete all name related field updates (Last Name, First Name, Display Name, Pronounce Name)



b. Address: Enter in facility address details into the fields below. Select 'Save' when completed.



c. Communication: Enter in phone and e-mail address details as applicable. Select "Save" when completed.



d. Miscellaneous



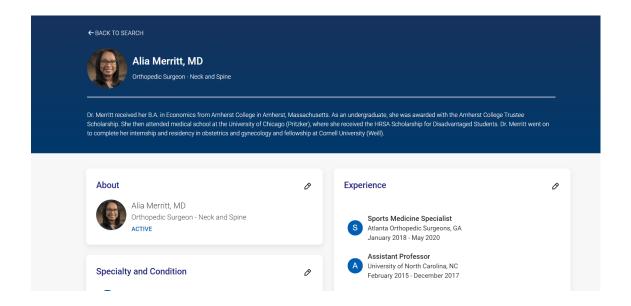
- i. Provider Status: Enables the provider as "Active/Inactive" in DASH360. For the provider to appear in DASH360, this must be set to "Active."
- ii. *Enable for DASH: Enables/Disables the provider to be visible in DASHcentral
- iii. *Enable for DASHself: Enables/Disables the provider to be visible in DASHself
- iv. *Show Slots for DASHself: Enables/Disables provider slots to appear on DASH Self . For DASHself provider slots to appear, this must be set to "Yes."

*Note: Enabling a Provider to be visible in DASHcentral and/or self does not mean the provider will automatically be active for scheduling. Prior to enabling the providers here in DASH360, please ensure that you have submitted provider preferences and instructions based on the appointment types the provider will be using to Radix Support. Please refer to the FAQ section on "Adding a New Provider" for more information.

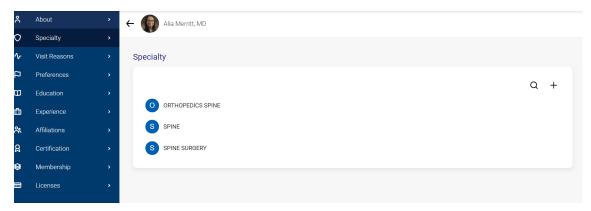
How To Update Existing Provider Data

DASH360 enables you to update existing provider data directly via the "About" section. The following outlines the steps you will need to take in order to update existing provider data to DASHcentral or DASHself using DASH360:

- 1. Log in to DASH by entering valid credentials and navigating to DASH360
- 2. Search for the provider you are looking to add in the search bar and select to open the provider detail page



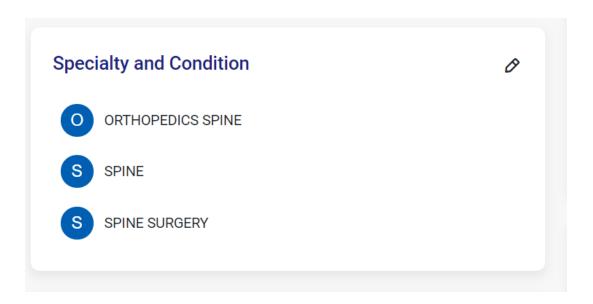
3. Select the pencil icon on the provider data section you would like to update to enable editing. The associated provider data section will open up to enable edits. You can navigate between different data sections via the menu on the left side of the screen.



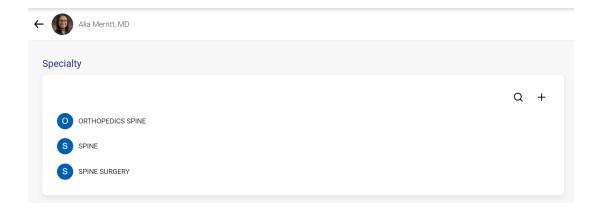
How to Add or Update Provider Specialties

Users can add or delete specialties as applicable to a provider. You can also map multiple specialties to a provider. This information aids in filtering providers as well as helps to direct relevant patients to each provider. If you are trying to add a specialty that does not exist in DASH360 please contact your Client Manager.

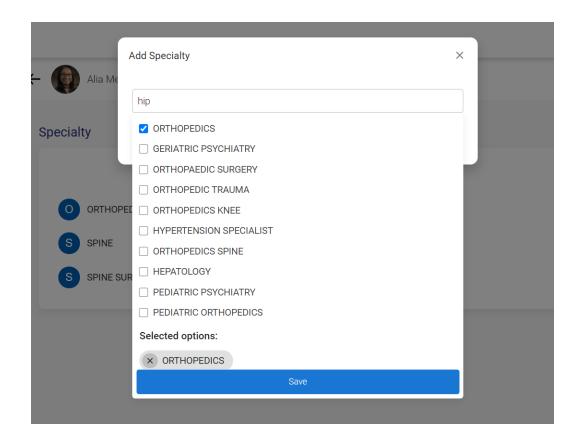
1. Users will be able to view the specialties on provider detail page



- 2. Click on the pencil icon to edit.
- 3. On the Specialty screen, click on the "+" sign to "Add a Specialty".



4. Enter the specialty you would like to add in the search bar, and select the corresponding check box. Users can add multiple specialties at the same time. When completed with the required specialty selections, select "Save" to save the changes.

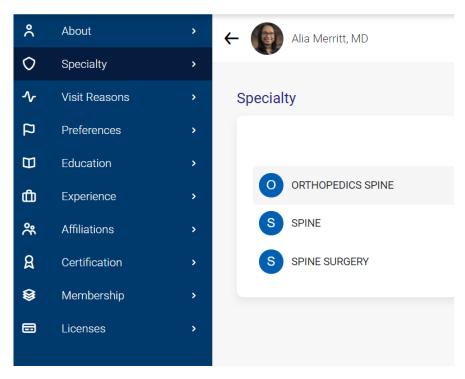


5. To delete a specialty, from the specialty screen, highlight the specialty you would like to remove, and then select on the "delete icon" (trash can) to remove

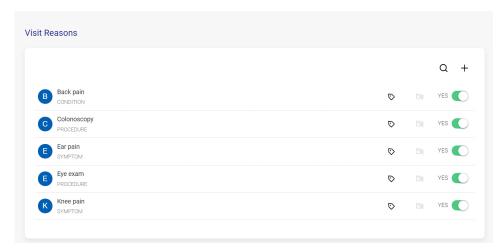


How to Add Provider Visit Reasons

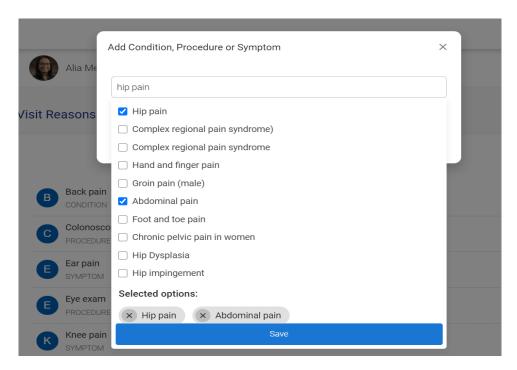
1. After adding Specialty, click on "Visit Reason" on the left hand side of the screen



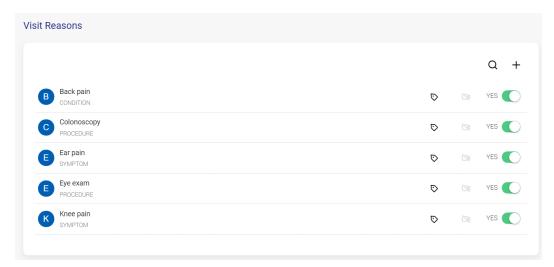
2. Visit reasons that are mapped to the provider's specialty, and at the individual provider level, will display here:



- 3. Click on: "Search" icon to search for all visit reasons mapped to the selected provider. Select the "X" to close the search results and return to the visit reason screen.
- 4. Click on: "Plus" icon to add new visit reasons for the selected provider. Enter in the visit reason you would like to add in the search bar and select the associated checkbox. Users can select multiple visit reasons to add simultaneously. When all required selections have been made, select "Save" to save changes.



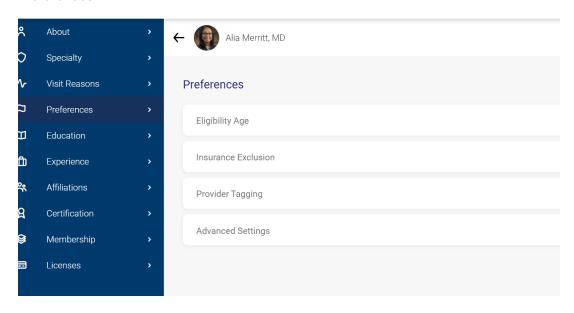
5. The user can assign the visit reason per provider preferences. Visit reasons that are not mapped to the global specialty level, but are treated by the individual provider should be added here:



- a. Visit Reason should be set to "YES" if the provider treats patients with this complaint
- b. Visit Reason should be set to "NO" if the provider does not treat patients with this complaint

How To Add a Provider Preferences

Users can set basic preferences for providers from this tab. From the main menu, Click on: "Preferences"



- 1. Eligibility Age: DASH360 can apply patient age preferences for scenarios whereby a provider will only treat patients between a specified age range.
 - a. The user can set the patient's age criteria which acts as a filter while scheduling an appointment for respective providers



- i. Select the age limit on the scale, as per the provider's preference
- ii. Click on "Save Age Preference"
- 2. Insurance Exclusion: DASH360 can apply insurance exclusion preferences to exclude patients with specific insurances

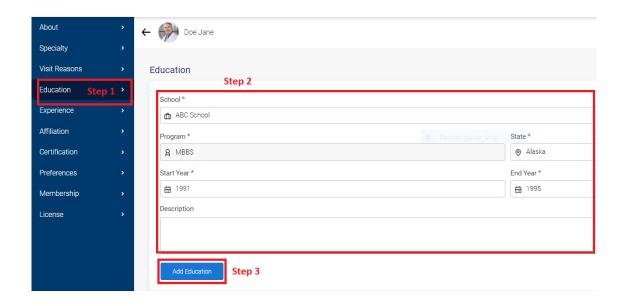
a. The user can exclude multiple insurances as per the provider's preferences, patients whose insurance are excluded will not be able to schedule an appointment with that specific provider



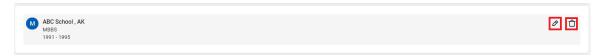
- i. Click on "Insurance Exclusion" tab
- ii. Click on: "+" icon
- iii. Search and add multiple insurances in one-go
- iv. Users can search by plan name or P.O. Box
- b. Click on: "Save" Button
- 3. Advanced Setting
 - a. This feature is currently unavailable

How To Add a Provider Education

- 1. You can add educational qualifications in this section. The user will be able to add multiple qualifications and these will be displayed on the provider detail page
- 2. Click on: "Education" tab
- 3. Enter the education details
- 4. Click on: "Add Education"



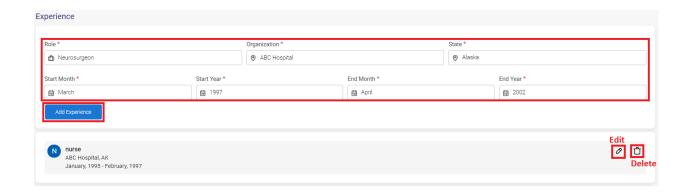
5. The user can edit or delete the Education Record



6. Note: The information entered here in the provider education section also drives what is previewed to patients on DASH Self

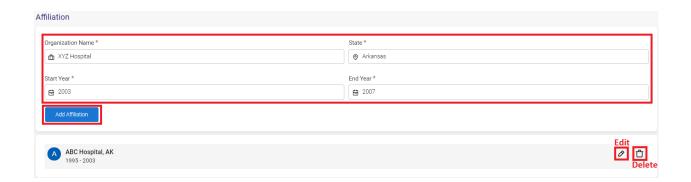
How to Add Provider Experience

- 1. You can add professional expertise and the years of experience to endorse provider proficiency
- 2. Click on: "Experience" tab
- 3. Enter the required details
- 4. Click on: "Add Experience"
- 5. The user can edit or delete any record



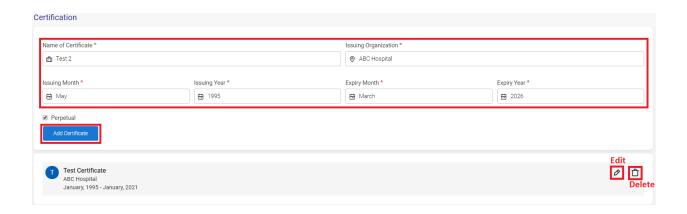
How to Add Provider Affiliation

- 1. You can add the provider's affiliations here. For example, if the doctor is affiliated with a particular sports team or hospital.
- 2. Click on: "Affiliation" tab
- 3. Enter the required details
- 4. Click on: "Add Affiliation"
- 5. The user can edit or delete any record



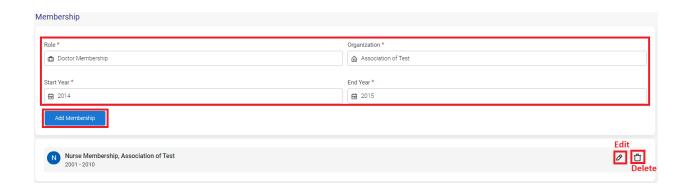
How to Add Provider Certification

- 1. You can add a provider's certifications here
- 2. Click on: "Certification" tab
- 3. Enter the required details
- 4. Click on: "Add Certification"
- 5. The user can edit or delete any record



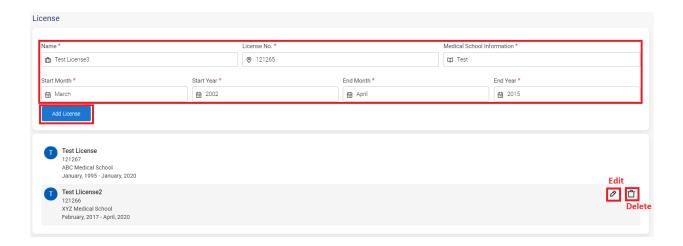
How to Add Provider Membership

- 4. The provider can exhibit various memberships from this tab
- 5. Click on: "Membership" tab
- 6. Enter the required details
- 7. Click on: "Add Membership"
- 8. The user can edit or delete any records



How to Add Provider Licenses

- 1. The provider can showcase their licenses from this tab
- 2. Click on: "License" tab
- 3. Enter the required details
- 4. Click on: "Add License"
- 5. The user can edit or delete any records



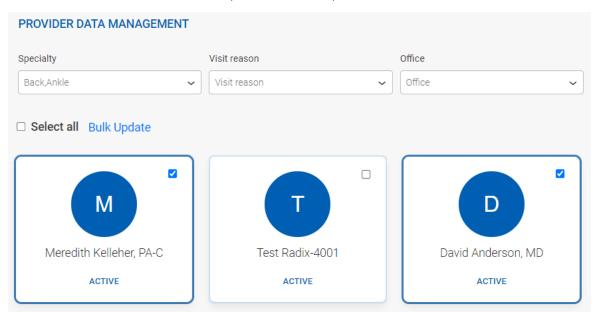
Bulk Updates of Provider Data

DASH360 allows for changes to be made to multiple providers at once using the Bulk Update functionality. Bulk updates are available for the following data points:

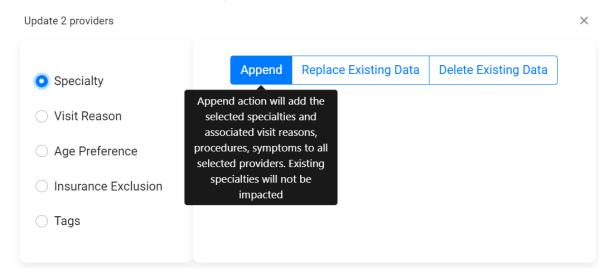
- Specialty
- Visit reason
- Insurance exclusion
- Tags
- Age preference

How to Bulk Update Specialties

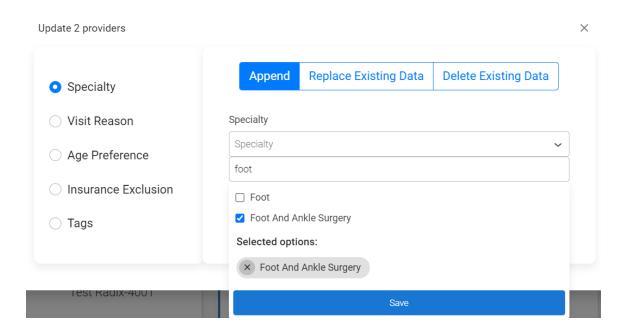
1. Click the checkbox on two or more providers in the provider results.



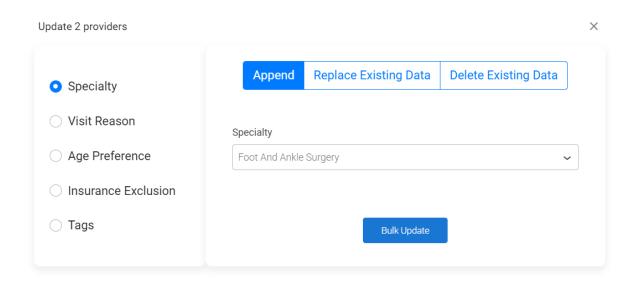
2. The Bulk Update screen will now appear. Click the "Specialties" radio button to begin the bulk update workflow. (Other provider characteristics can similarly be updated by choosing the other radio buttons.)



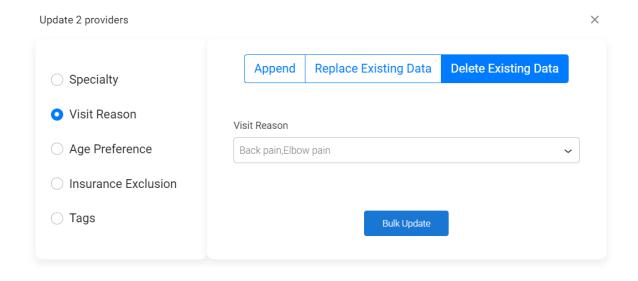
3. To add specialties to selected providers' profiles, search and select the specialty and click 'Save.' ("Replace Existing Data" will add the selected specialties and simultaneously delete the providers' previously associated specialties.)



4. Click 'Bulk Update' to finish.



5. The "Delete Existing Data" action follows a similar process to "Append" and "Replace Existing Data." You will first be prompted to search and select for the specialty, visit reason(s), etc. you want to remove from the providers' profiles. After selecting all that apply, click "Bulk Update" to finish.



SECTION 3

Best Practices & FAQs

We're committed to your success. This section will show you how to get the most out of your DASH360 platform. We've provided our recommendations for optimizing features as well as answers to common questions and concerns.

Adding New Providers

How do I fully enable a new provider for scheduling on DASHcentral and/or self?

DASH360 gives you the ability to enable providers on both DASHcentral and self. However, prior to enabling providers here in DASH360, Radix will need provider preferences and instructions based on appointment type. Please submit the following details to support@radixhealth.com so that Radix can complete the new provider set up:

Information Requested	Definition
Provider Name	Name of Provider(s)
Appointment Type (From EHR)	Duration of Appointment Type (i.e. 15 mins)
	For new patient appointment types, please clarify the
	definition of new patient as defined by your practice (i.e. a
	new patient is defined as new to provider , new to practice as
	of last 3 years, etc.)
	Please include another provider name set up with the same
	appointment type and duration as you'd like for the new
	provider to have as well (if applicable)
Appointment/Event Type ID (From	Required only if the provider will be mapped to new
EHR)	appointment types not previously established in DASH
	Please include any other relevant information that may need
	to apply (e.g. Advanced Practitioner, max count rules per
Other	provider, triage or pop questions, etc.)

Disabling Providers

How do I disable a provider from DASHcentral and/or self?

DASH360 enables you to disable providers directly for DASHcentral and/or self. After selecting the provider you would like to disable, navigate to the "About" tab, and expand the "Miscellaneous Section." Select the "Disable" icon to disable the provider from being visible AND from showing available slots. For Self clients, please ensure in addition to completing this section, any associated provider links are removed from your site. For all clients disabling providers, please notify your Client Success Manager so that provider count records can be updated accordingly.

Adding Specialties:

How do I add a specialty to DASH360 that is not currently configured in DASH?

First, try to locate the specialty in DASH360 by searching in the "Specialty" tab for the particular specialty. If it is not found in the DASH360 database, send a ticket to support@radixhealth.com to onboard the specialty, including the following information.

Information Requested	Definition
Provider Names	List of providers to be associated with this specialty
Enable for Central and for Self?	Which products should this specialty be searchable in? (for example:- Some clients may not want Neurology to be scheduled for via DASHself)
Other	

Adding Visit Reasons

How do I add a specialty to DASH360 that is not currently configured in DASH?

First, try to locate the visit reason in DASH360 by searching in the "Visit Reason" tab for the particular visit reason. If it is not found in the DASH360 database, send a ticket to support@radixhealth.com to onboard the visit reason with the information outlined below. This also applies to any visit reason synonyms you would like added to existing visit reasons as well.

Information Requested	Definition
Provider Names	List of providers to be enabled for this chief complaint / body part.
Enable for Central and for Self?	Which products should this chief complaint be searchable in? (for example:- Some clients may not want brain injuries to be scheduled for via DASHself)
Triage (for clients who utilize Triage questions)	What questions would you like to ask, for this chief complaint, to help triage your appointments? As far as possible, please use existing Triage question sets, since designing new ones is time-intensive and complex.
Service Type	What clinical services would you like to be offered, when this chief complaint is selected? (for example:- Office Visit, MRI, Post Op, Telemed, etc.)
Other	

Updating to DASHself

How do I make updates to DASHself in DASH360?

The following fields can be edited in the "About" profile in DASH360. Any edits to the

following fields will update self and corresponding fields in central:

- Provider Image
- Provider Last Name, First Name
- Provider Heading
- Provider Summary
- Provider Education
- Enable for DASHself, Show slots for DASHself
- Visit Reasons: If provider visit reasons differ between Central and Self, please contact your
 Client Success manager to review the optimal approach for setup. Currently DASH 360
 doesn't enable the ability to distinguish set up for specialties or visit reasons that differ
 between Central and Self.

SECTION 4

General Troubleshooting

You may first want to ask a colleague or your supervisor for immediate assistance, but in the case of an issue or a training question, you can contact us at any time and we will respond as soon as possible.

- Please refer to DASH360 training resources and FAQ's to review answers to your particular questions
- If you are unable to locate the answer to your question, please contact your Client Success Manager for additional guidance
- For specific technical or product inquiries, please log a ticket to our support desk by emailing <u>support@radixhealth.com</u>. We are here to help!