



# Patient Portal Set-Up Manual

Comprehensive guide for creating your profile & organising a video consultation.

**Supported by:**

# Welcome

## About the Service

### Is this service endorsed by the HSE?

Yes it is endorsed by the HSE. The HSE has made this decision in response to the current outbreak of COVID-19. Any clinician that wants to use it can avail of the free 30 trial and then discounted monthly subscription.

### What is this service?

The purpose of this service is to enable clinicians to perform remote video consultations with their own patients.

Appointments can be created for a specific time, specific clinician and patient. Regardless of the size of your clinic all your staff will now have the ability to easily consult with their own patients online.

Consultations can be done via most modern Web Browsers (Chrome, Firefox, Safari and Opera), our iOS, Android apps or computer from anywhere.

### How does it work?

Any member of your team can create an appointment. The patient will receive an email (or SMS) with a link and unique code to use to enter their consultation room.

Your clinician will have the ability to enter the same virtual room and will be able to consult with the patient through video.

A clinician can set up an appointment themselves in under 10 seconds, all they need is an Email or Mobile number for the patient.

Dont hesitate to contact us on: [info@wellola.com](mailto:info@wellola.com)

# Functionality

Our platform and comprehensive suite of features allow for seamless interaction between provider and client from before, during, to after the consultation. Our comprehensive suite of features is as follows:

-  **Client-facing Portal- branded to customer needs**
-  **Online Booking for in-person or e-visit sessions with appointment reminders**
-  **Optional Online Payment Facility: at reservation, e-invoicing, in video call**
-  **Video Consultation via SMS/ email or in-app**
-  **Secure Messaging**
-  **GDPR-compliant Correspondence (provider to client & provider)**
-  **Store images and documents with client file**
-  **Client Library- upload ongoing educational material**
-  **FHIR/ HL7 API available where required**

Dont hesitate to contact us on: [info@wellola.com](mailto:info@wellola.com)

# Security

## Digitization & Cybersecurity

At Wellola, we believe the digitisation of any healthcare administration process must be matched with proportionately sophisticated Cybersecurity measures. Wellola stores & backs up all data in secured, state-of-the-art AWS data-centers **within the EU** (two centres, three zones each). We are therefore compliant with GDPR and EU regulation.

## Secure By Design

This solution has been architected with the specialist support of DNM Group - recognised as an AWS Well-Architected Premier Partner (there are only twenty-one in EMEA). With their hands-on experience in architecting, building & optimising architectures that follow the AWS Well-Architected Framework we can now offer enhanced levels of data security.

## Encryption

A Hyper Text Transfer Protocol Secure (HTTPS) using a 256-bit Secure Socket Layer (SSL) certificate is used throughout the site ensuring a 2048-bit encryption at rest & in transit so that data is always safe when being transferred from any device to our servers. Our proprietary **WebRTC is encrypted end-to-end**. WebRTC is considered by industry professionals as the most secure VoIP solution, and it is how all video calls are made within our platform.

## Third Party Monitoring

Our platform avails of third party **24/7/365 monitoring** that takes advantage of the latest statistical mechanisms & machine learning to provide a premium quality control & risk management service. Thanks to its heterogeneous monitoring & logging systems, abnormal patterns of behaviour can quickly be identified and responded to.

## Data Processing

Wellola has completed stage 1 of independent ISO27001:13 certification, an international standard that demonstrates a secure environment when managing all client information.

# Lets get started...

## How does it work?

Once clients are added, any member of your team can create an appointment. The client will receive an email (or SMS) with a link to enter their virtual consultation room.

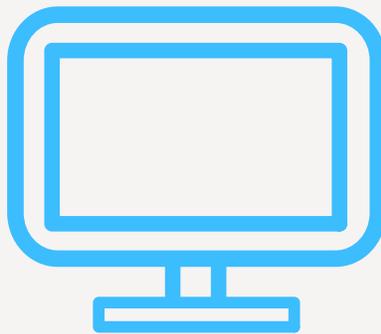
The clinician will have the ability to enter the same virtual room and will be able to consult with the client through video.

## What do I need?

All you need as a provider or client is:



Internet connection  
(wifi/3G/4G)



A device with a  
microphone and webcam  
(computer/laptop/Phone)

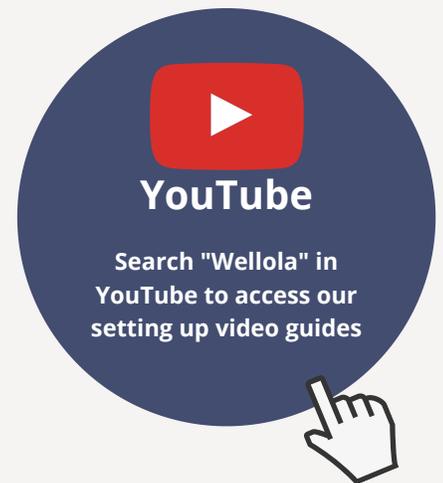


A compatible browser  
(Chrome, Safari, Edge)

# Let's get started...

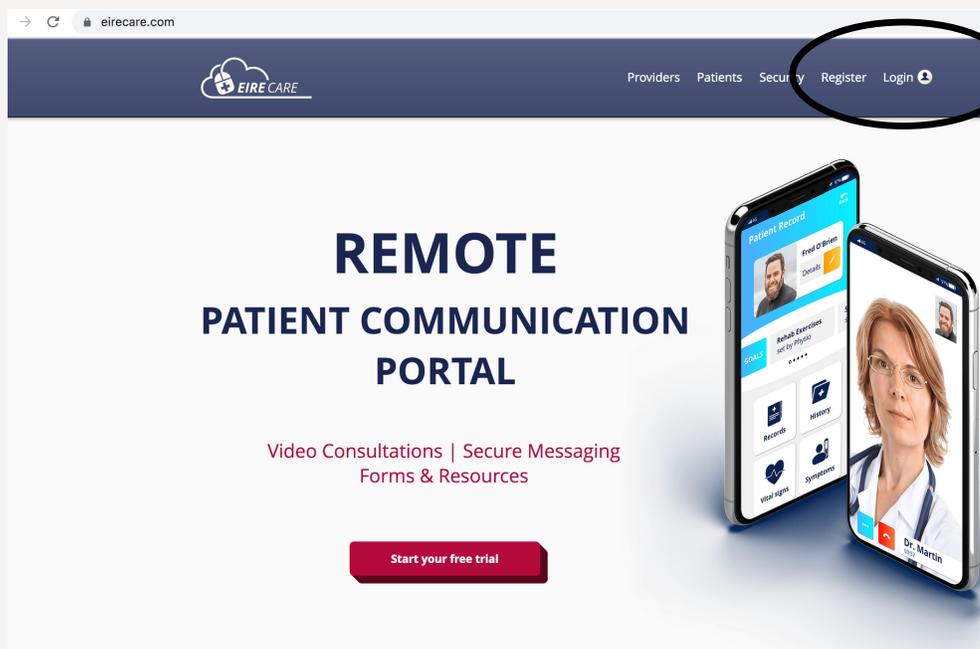
## Contents

1. **Logging In**
2. **Quick Telehealth Function**
3. **Overview (Profile Creation)**
4. **Admin Settings**
  - Clinic Details
  - T&C's Form
  - Appointment Types
  - Working Hours
5. **Online Booking**
  - Adding a Service Provider/Clinician
  - Managing Several Providers
  - Booking Code
  - Booking Form Link
6. **Accept Payments**
7. **Advanced Telehealth Function**
  - **Add Clients**
  - **Make an Appointment**
    - Setting Automatic Patient Reminders
  - **Make a call**

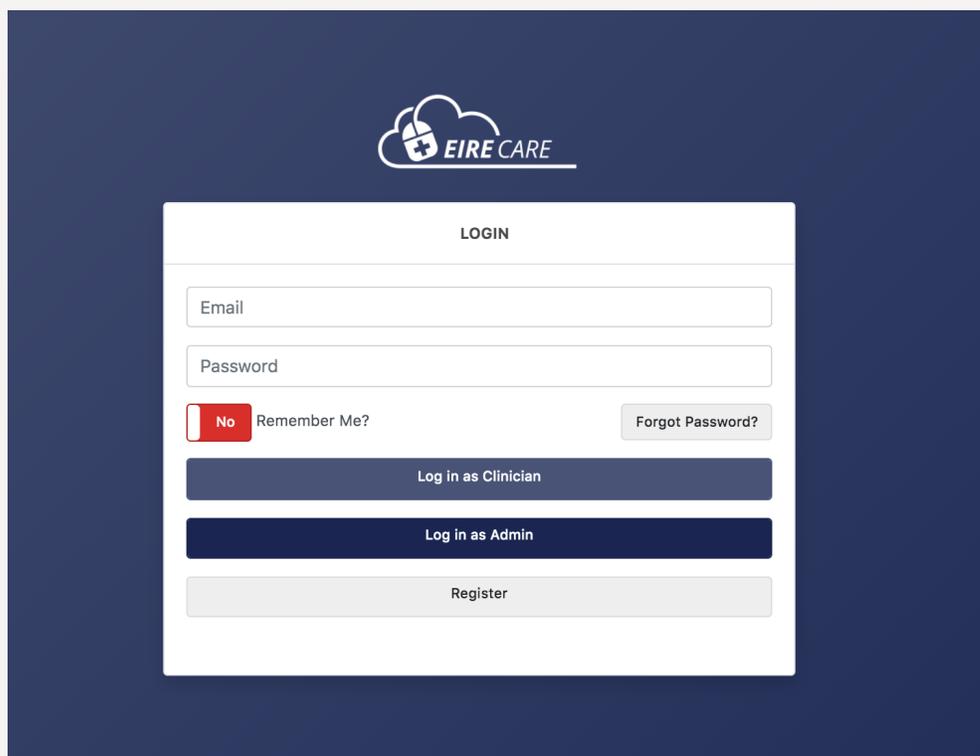


Dont hesitate to contact us on: [info@wellola.com](mailto:info@wellola.com)

# Logging In



**Log In** here at [www.eirecare.com](http://www.eirecare.com)



**Logging in as a provider:** For doctors & clinicians

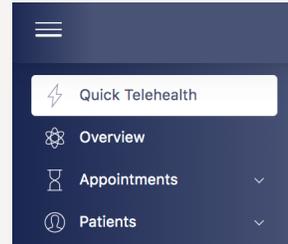
**Logging in as admin:** For admin staff/the user who originally set up the account.

# ⚡ Quick Telehealth Function

The Quick Telehealth Function allows you to make a video call with a client in under 30 seconds without making an appointment.

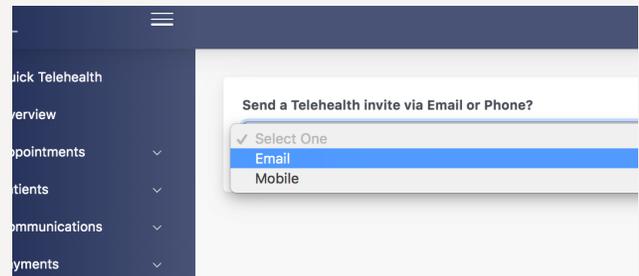
## Step 1:

Go to the left hand side tab and click on the "Quick Telehealth" link.



## 2. Send the invitation link to the client

You can do this either by email or SMS by choosing one from the drop down list.



## Mobile Option

Send telehealth invite to this Mobile

Phone Number

Please include country code

+353

Do you want to save this Client?

[Send Invite](#)

## Email Option

Send telehealth invite to this Email

Do you want to save this Client?

[Send Invite](#)

## 3. Start the call

Enter the video call by clicking on the green button.

[Go To Telehealth Session - lizd090@gmail.com](#)

# Step 1: Overview

1

Admin Settings

2

Online Booking

3

Accept Payments

The screenshot shows the Admin Settings page with a progress bar at the top indicating '1 Admin Settings', '2 Online Bookings', and '3 Accept Payments'. A 'Days left in trial' indicator shows '8'. The left sidebar has four menu items: '1 Clinic Details' (selected), '2 Terms and Conditions', '3 Appointment Types', and '4 Working Hours'. The main content area for 'Clinic Details' includes an 'Update Profile Photo' button, a profile picture placeholder, and a form for contact details. The contact details form has fields for Name (Sonia Test Account), Phone (012988132), Email (soniagamble@gmail.com), and Website. Below this is a Bio field and a 'Save' button. At the bottom, there are fields for Street Address and City, with a note: 'This is the address that appears on your invoices'.

## 1 Clinic Details

Fill out all fields. Once "saved", you don't have to revisit this page.

The screenshot shows the Admin Settings page with the 'Terms and Conditions' section selected in the sidebar. The progress bar at the top shows '1 Admin Settings', '2 Online Bookings', and '3 Accept Payments'. The sidebar has four menu items: '1 Clinic Details', '2 Terms and Conditions' (selected), '3 Appointment Types', and '4 Working Hours'. The main content area for 'Terms and Conditions' includes a 'Save' button and a large text area for entering terms and conditions. A note above the text area says: 'Please populate the below with your Terms and Conditions so your Patients can consent when making an online booking'.

## 2 T&C's

Fill out the field with your clinic's customisable T&C Policies. (e.g. Cancellation/Privacy policy)

# Step 1: Overview

1

Admin Settings

2

Online Booking

3

Accept Payments

1 Admin Settings

2 Online Bookings

3 Accept Payments

3 Appointment Types

4 Working Hours

Appointment Types

Please enter the in types of sessions provided.

Appointment Name: Appointment

Duration: Select

Cost: Cost

Display Online?

Telehealth?

## 3. Appointment Types

Make sure to click on "telehealth" if your appointment will be a video consultation. If you select "Display online" this means your appointment will be visible to patients booking online.

1 Admin Settings

2 Online Bookings

3 Accept Payments

4 Working Hours

Please input availability.

Day	Available?	Start Time	To	End Time	Action
Mon	<input checked="" type="checkbox"/>	09:00	To	17:00	+
No Breaks Scheduled for Monday					
Tue	<input checked="" type="checkbox"/>	09:00	To	17:00	+
		10:00	To	16:00	-
Wed	<input checked="" type="checkbox"/>	00:00	To	00:00	+

## 4. Working Hours

This will be the Clinic's default working hours.

Click on the "+" in the green box to add breaks.

Remember to click save.

# Step 1: Overview



Admin Settings



Online Booking



Accept Payments

Admin Settings Online Bookings Accept Payments

1 Add A Service Provider

2 Add Booking Codes

3 Take Payments

4 Booking Form Link

You have 2 Clinicians set up. Your plan allows for 100 Clinicians.

When creating a Clinician, you must use a different Email from the Admin Email.  
Your Patients do not see your Clinicians email details - they only act as an identifier for security purposes.  
The public only sees correspondence from the Admin Email.

First Name

Last Name

Email

Choose Color Code

Copy your default availabilities to this Clinician

Copy your default Appointment types to this Clinician

Services

<input type="checkbox"/> No Physiotherapist	<input type="checkbox"/> No Psychologist	<input type="checkbox"/> No Occupational Therapist
<input type="checkbox"/> No Speech and Language Therapist	<input type="checkbox"/> No Dietitian	<input type="checkbox"/> No Nutritionist
<input type="checkbox"/> No Optician	<input type="checkbox"/> No Audiologist	<input type="checkbox"/> No Dentist
<input type="checkbox"/> No Psychiatrist	<input type="checkbox"/> No Podiatrist	<input type="checkbox"/> No Chiroprapist
<input type="checkbox"/> No Veterinary Practice	<input type="checkbox"/> No Dispensing Optician	<input type="checkbox"/> No Personal Trainer
<input type="checkbox"/> No Physical Therapist	<input type="checkbox"/> No Counselor	<input type="checkbox"/> No Psychotherapist
<input type="checkbox"/> No Pharmacist	<input type="checkbox"/> No General Practitioner	

Add Clinician

## 1 Add a Service Provider

You need to add at least one service provider. Enter details above.

Note the default working hours set up for the clinic will automatically apply for this provider. (If you want to customise the provider's hours please see the following page.)

Make sure to click a service and then "Add Provider" to save the steps.

# Step 1: Overview

1

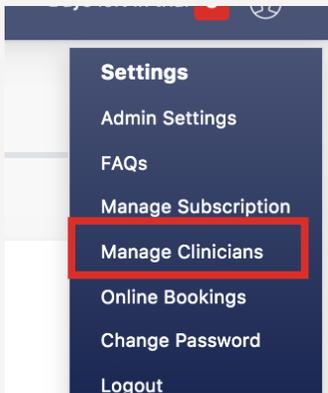
Admin Settings

2

Online Booking

3

Accept Payments



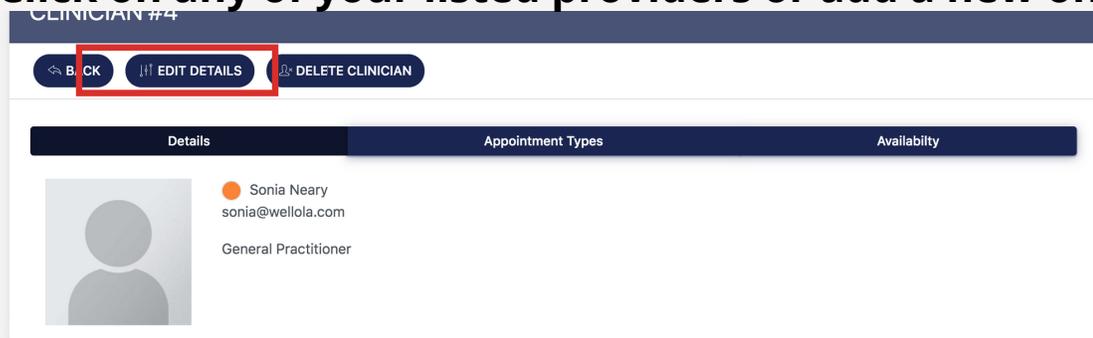
## Side Note - Managing Multiple Service Providers

Click on the Profile Button on the top right hand of the screen. Select "Manage Providers" from the drop down list.

Click on any of your listed providers or add a new one.



Click on any of your listed providers or add a new one.



Click on "Edit Details" to edit this provider's email or reset password if need be.

# Step 1: Overview

1

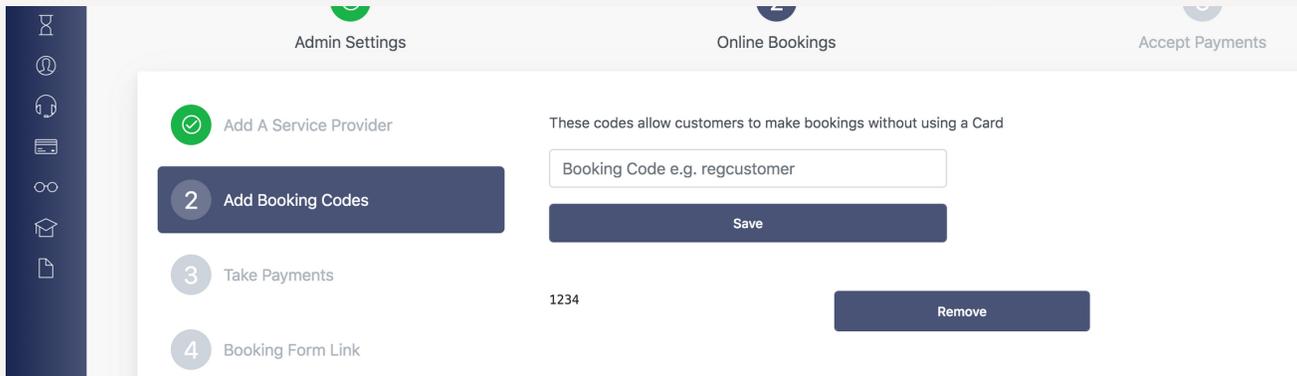
Admin Settings

2

Online Booking

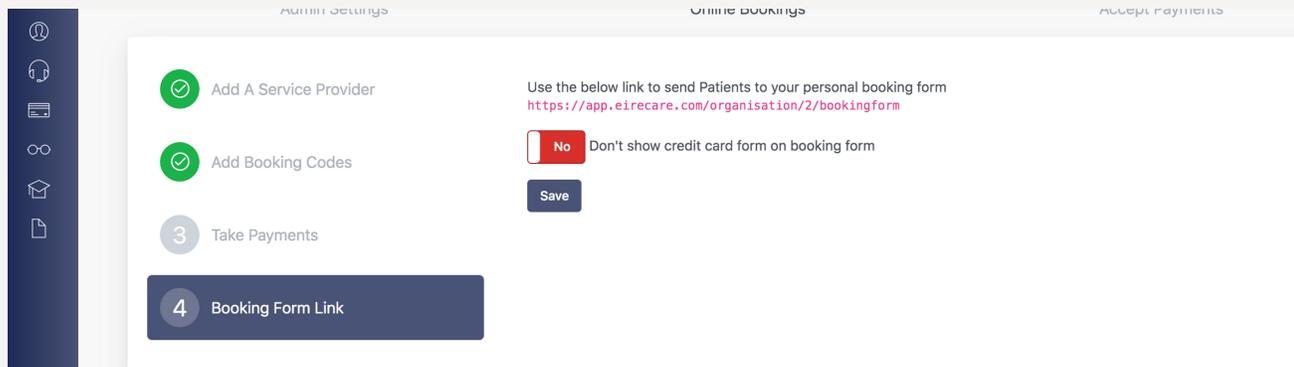
3

Accept Payments



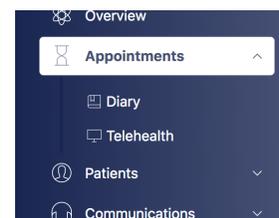
## 2 Add a Booking Code

If you don't want to charge patients - simply add a booking code (that has no spaces) to allow patients to bypass any payment features during online booking. (e.g. relevant for Medical card holders/Public Sector Appointments.)



## 3 Add a Booking Form Link

You can copy and paste this customised link into your website or send directly to patients to allow them to book online.



When your appointments are booked online, they are automatically updated in your Diary or Telehealth Appointment tab; depending on whether the appointment is a video consultation or not.

# Step 1: Overview



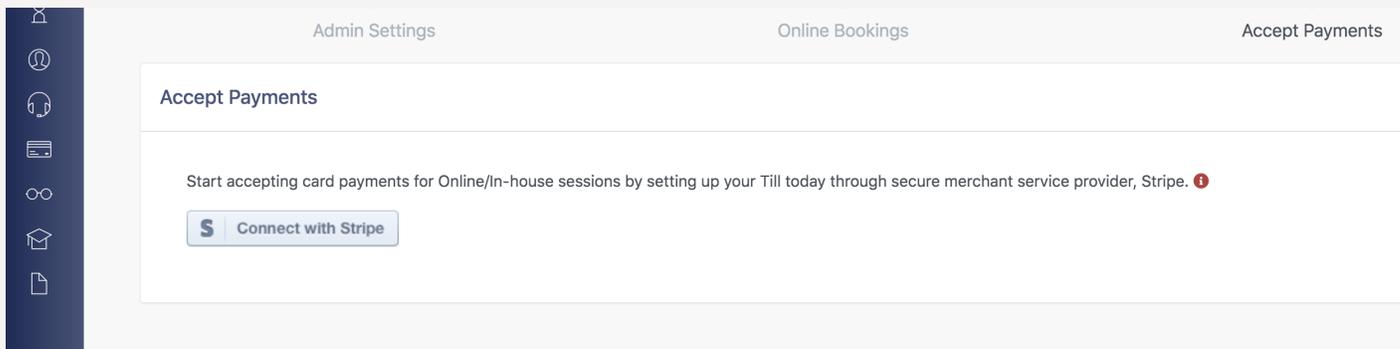
Admin Settings



Online Booking



Accept Payments



## Add a Payment Method

If you are charging clients - simply add your stripe account. You might need to set up a stripe account if you don't already have one. Simply click on the link and follow instructions.

Payments can also be clocked manually if you have an external card reader. (Please see Payments Tab on the Patient Portal.)

There are also functionalities in our platform to securely eInvoice clients. Simply "Generate an invoice" in the "Payments" - "Till" tab.

Note:

Connecting with Stripe will add additional costs to this platform. Stripe's business model charges per transaction paid into your account.

Please click [here](#) to see Stripe's pricing.



# Step 1: Overview



Admin Settings



Online Booking



Accept Payments

## A Note on Payments

### Patients can enter their card details by 3 ways:

1. Inputting their details at the point of reservation via the online booking form
2. Inputting their details in the card feature button of the video call
3. You as a provider can manually & securely enter their card details into their file by taking their details over the phone.

**When the patient enters their card details, their details are saved to the portal. They are not charged until you, as the provider, manually charge them.**

This is to reduce follow up admin (i.e. having to refund clients/patients if their were technical difficulties/drops internet connection that might cease cause a consultation to not go ahead.)

To charge see how to charge the card - please see page 21 of this manual.

## Congratulations!

You have now set up your profile and you can start adding clients and organising video consultations.

Continue reading to see how...

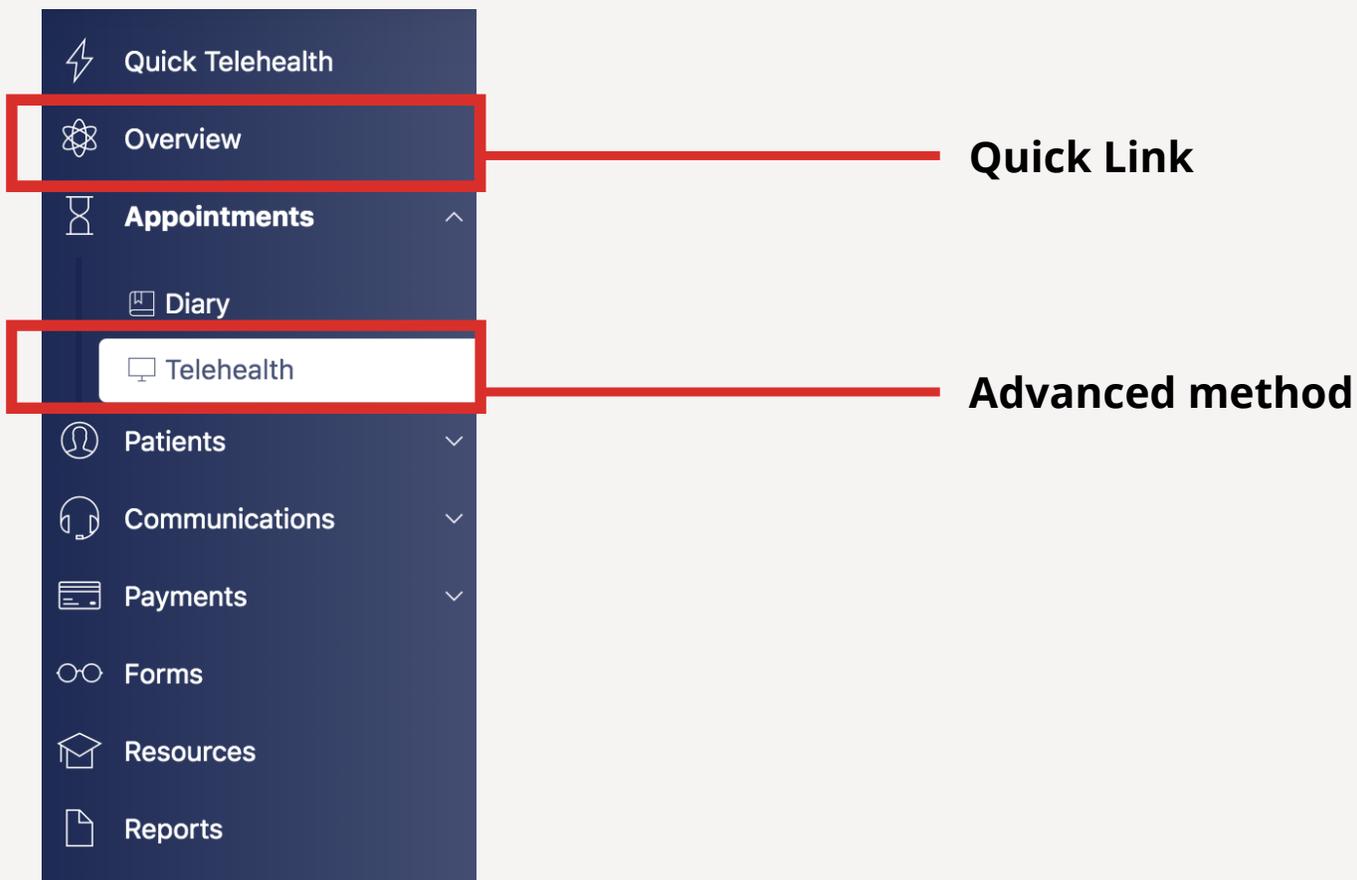
# Step 2: Advanced Telehealth

## Note

There are 2 ways of creating/entering a video call on this platform.

The first way is by using the **Quick Telehealth Function** outlined at the start of this manual.

The second method is explained in the following pages. This **"Advanced"** method allows you to organise appointments, deal with your full client list and to manage an agenda.



# Step 2: Advanced Telehealth

1

Add Clients

2

Make Appointment

3

Call

**ADD PATIENT**

[BACK](#) [IMPORT](#)

Clinician  
Sonia Neary

First Name  Last Name  Email

Phone  Address  Medical Practitioner

Must be in the format +[country code][mobile number] for SMS

Next of Kin Contact  Next of Kin Telephone  Date of Birth

Medical History/Other Notes

## Add Client(s)

Click on the "Clients" Tab on the side navigation bar. Click "Client List". Then select the "Add Client" Link.

Add a client manually by filling out all relevant information fields above and then saving. If you wish to import your existing client list, simply download our template in the "import clients" page.

**IMPORT**

[BACK](#)

Choose Clinician  
Sonia Neary

Kind of import?  
Wellola

Choose your import file  
[Choose file](#) No file chosen  
[Upload](#)

**Instructions for mass-importing Patients**

1. Download import template here (wellola-import-template.csv)
2. Populate template with your Patient list in the appropriate columns
3. Save file to your computer
4. Choose this file & upload
5. You will be directed to the Patients page preview
6. If details look correct click "Yes" and they will be stored

If you need a customised template to suit your existing Data Practice Management System, simply let us know and we will tailor one to your needs.

# Step 2: Advanced Telehealth

1

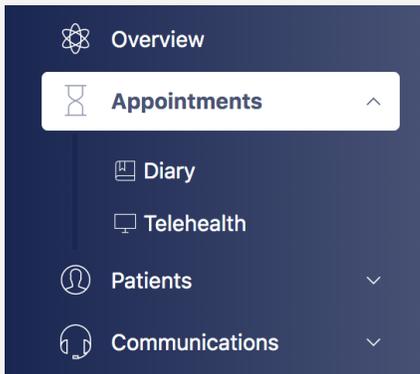
Add Clients

2

Make Appointment

3

Call



## Make an Appointment

Click on the "Diary" Tab on the side navigation bar under Appointments. Click "Add Appointment".

A screenshot of a 'Set Appointment' modal form. It has a close button (X) in the top right. The form contains the following fields:

- 'Who is the Appointment with?' dropdown menu with 'Demo Provider' selected.
- 'Who is the Appointment for?' dropdown menu with 'Demo Client' selected.
- 'Date' text input field with '2020-03-27' entered.
- 'Type' dropdown menu with 'Select' selected.
- 'Start Time' text input field with '09:00' entered.

At the bottom, there are three buttons: 'Save Appointment' (green), 'Add Client' (yellow), and 'Close' (grey).

## Appointment Details

Fill in all fields and then click "Save appointment".

If it is a telehealth consultation, make sure to select Video consultation in the "Type" field.

# Step 2: Advanced Telehealth

1

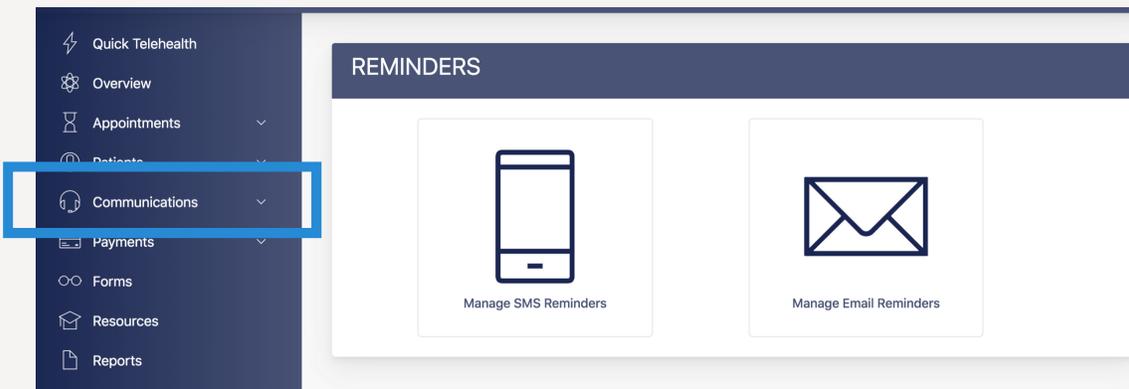
Add Clients

2

Make Appointment

3

Call



## Set Automatic Appointment Reminders

Click on the **"Communications"** Tab on the side navigation bar under Appointments. Click **"Reminders"**.

## Choose either SMS or Email Reminders

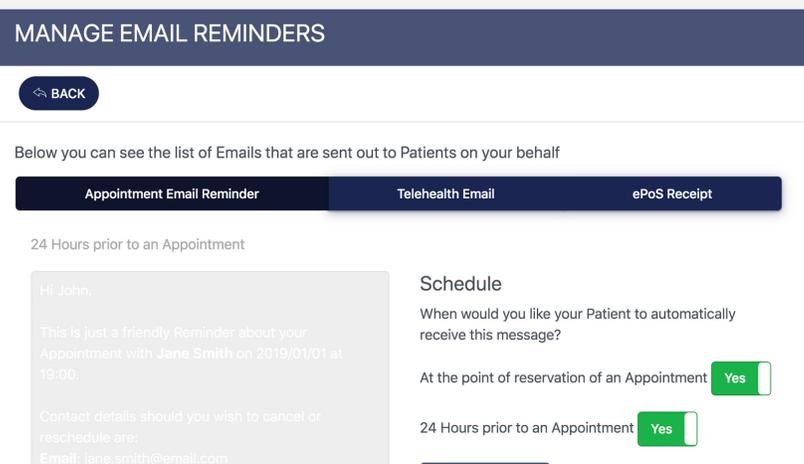
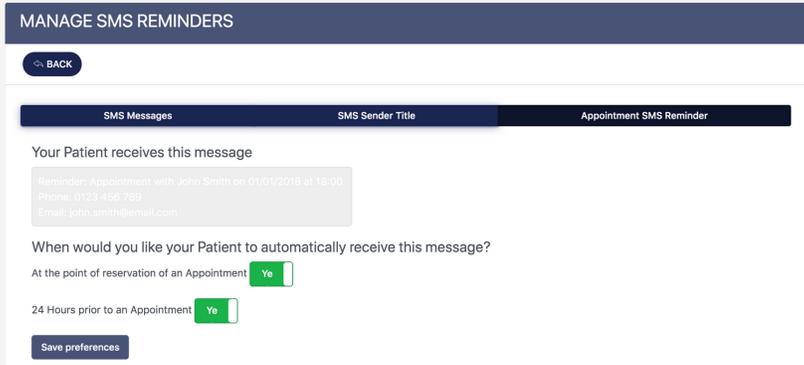
Make sure to drag the red toggle marked as "no" to the right until it is marked "yes".

The reminders are defaulted to "no" unless you change them.

Make sure to **save** preferences after.

### Regarding SMS reminders:

The Top Up Account must be credited in order to send SMS messages.



# Step 2: Advanced Telehealth



Add Clients



Make Appointment



Call

Click on "Clients" Tab. Then click on "Telehealth" to access video consultation appointments.

The screenshot shows the 'TELEHEALTH' section of a software interface. On the left is a dark blue sidebar with navigation options: Overview, Appointments, Diary, Telehealth (highlighted), Patients, Communications, Payments, Forms, and Resources. The main content area has a header 'TELEHEALTH' and a search bar. Below is a table with columns: Status, Appointment Type, Date, Patient Name, Clinician Name, and Actions. Two rows are visible, both for 'Video Consultation' appointments on '20th of May 2020'. The first row has a status of 'Upcoming'. The second row has a 'View' button with a camera icon, which is highlighted with a red box. At the bottom right, there are pagination controls: 'Showing 1 to 2 of 2', 'Previous', '1', and 'Next'.

Click on the "View" to commence a video consultation with the patient.

This is a close-up of the 'TELEHEALTH' table from the previous screenshot. The 'View' button with a camera icon in the second row is highlighted with a red box. The table headers and other data are the same as in the previous image.



You will then be redirected to the Video Call screen. Click on the **green phone button** at the bottom of the screen to commence the call.

# Charging Patient's Cards

As mentioned on page 15, patient's card's will not be charged until the provider manually does so following the consultation.

This page will show you how to do it.

## Step 1. See if the Patient's card details have been saved:

CLIENT #8

BACK ADD NOTE

Patient Details Notes Appointments Invite to EireCare Patient

CONTACT INFO

First Name Last Name

Date of Birth 01/01/1970 Address

Telephone Email

Must be in the format +[country code][mobile number] for SMS Reminders

Health ID

SAVED CARDS

No cards saved for this customer

Clinician Stripe account not connected

Upon accessing a patient's file you should be able to see the patient's saved card. If not, it means the patient is yet to enter their details.

Patients can enter their details via the online booking form or via the payment feature in the top left corner of the video call.

## Step 2. See their appointment logs

CLIENT #8

BACK ADD NOTE

Patient Details Notes Appointments Invite to EireCare Patient

Show 10 entries Search

Invoice ID	Date	Appointment Type	Status
Generate	7th of Apr 2020 - 13:09 to 13:24	Video Consultation	Not paid
Generate	30th of Nov -0001 - 09:30 to 09:45	Video Consultation	Not paid
Generate	30th of Nov -0001 - 16:45 to 17:00	Video Consultation	Not paid
Generate	23rd of Mar 2020 - 13:00 to 13:15	Video Consultation	Not paid

Click on "Not Paid" and you will be directed to the virtual "Till"

# Charging Patient's Cards

## Step 3. Add to Cart

### TILL

[INSTRUCTION VIDEO](#)

Patient Name		Clinician Name	
Demo User (Sonia Test Account)		Elizabeth Doyle	
Appointment Type	Quantity	Price	
Video Consultation (€ 50, 15 mins)	1	€ 50	
Add Note	Any other relevant information		

Video Consultation	x1 €50.00	
Sub Total	€ 50.00	
Discount	€ 0.00	
<b>Total</b>	<b>€ 50.00</b>	

Accept real-time card payments through

Fill in the Form above by adding the patient's name, provider and the Appointment Type. Then "Add to Cart".

Once added to cart the appointment charge will be added to the "basket" on the right hand side. (See "Video Consultation" above.)

## Step 4. Process Invoice and Payment

Below the basket on the right hand side of the page will be a drop down list of the patient's saved card(s).

Choose the relevant card and tick the below box to confirm the card is correct.

Select the blue button at the bottom of the page that says "Process Payment".

**At this moment, the patient's card has been charged.**

# FAQs

## What security measures does EireCare offer?

At Wellola, we take security very seriously. We are proud to announce that we are **hosted in Ireland and the EU** to ensure full GDPR compliance with all features of the platform.

For more detailed information on our security measures please click [here](#)



## How much does this platform cost?

Wellola is free for the first 30 day trial period after registering. Following the trial, there is a rolling monthly subscription charge of €29/£25 per clinician per month which can be cancelled at any time. This includes **unlimited video calls**. Patients can use the app for free.

## Is there a contract?

No. As said above, we operate on a monthly subscription basis which includes unlimited video calls and access to our full comprehensive suite of features.

## How do patients pay me?

Our platform offers seamless payment solutions which can be accepted at point of reservation, during the video consultation or afterwards through an invoicing method. This can be achieved by connecting with Stripe - a secure merchant provider.

## If we are a large enterprise, can we get a lower price?

Yes. Please email [info@wellola.com](mailto:info@wellola.com) for a more detailed proposal.

If you still have more questions, click the button below to visit our website and ask a question:

Ask a question



# How to get in touch

## Do you need help setting up?

We're here to help and would be delighted to offer you a **1:1 Demo** with a member of our staff.

To help you set-up or to troubleshoot any problem, simply book a time slot with us using the following link:

 <https://calendly.com/patient-portal-demo/iacp-wellola-portal-demo>

If not, our team is on hand Monday-Friday 9am-5pm to respond to any email queries too!

 [info@wellola.com](mailto:info@wellola.com)



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