GoShare Healthcare

goshare.realtimehealth.com.au

# User Guide

## Patient Education


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HEALTHILY

Patient Education Solutions

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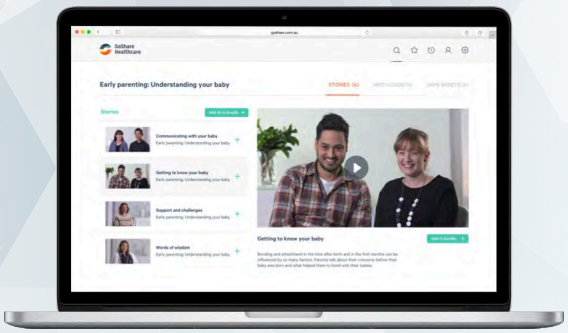
# Contents

# SECTION 1

## Introduction



# SECTION 1
# Introduction

## Background

### What is GoShare?

GoShare Healthcare is an intuitive online tool for health practitioners to customise and send health and wellness resources to recipients as part of their routine practice workflow.

It uses technology and functionality that everyone is familiar with and sources information from a substantial library of approved, credible health content relevant to a broad range of health and wellness topics.

GoShare can be accessed and used by the Health Practitioner from any computer, tablet, smart phone or other mobile device. Patient education information can be sent on a single occasion or scheduled over time as part of a digital program.

GoShare can provide practitioner-driven support for the continuation of care at home, minimise unnecessary returns for consultation and ensure the recipient has access to the latest version of patient education information.

### Purpose of this User Guide

The purpose of this User Guide is to provide information on the features and functionality of GoShare and how best to use this effectively to achieve the best outcomes for patient education.

It should be used in conjunction with the GoShare Bootcamp videos which can be accessed at **http://healthily.com.au/goshare-bootcamp**.

## Patient Education Content

### Evidence-based and variety of formats

Content is provided in a variety of formats (video, text, animation, links) to accommodate a range of learning styles and can be tailored by the health practitioner according to the individual's capacity to self-manage.

GoShare Healthcare takes an evidence-based approach to content development and information delivery models. There is extensive research showing that

- patient narratives (personal testimonials, storytelling, stories-based messaging) have a positive impact on self-efficacy and self-care, and
- using internet and mobile phone technology can increase the access to relevant patient information.

For each health title, there are four kinds of content available, each developed by, or in partnership with, recognised and accredited peak health organisations.

### Patient Stories

The "Speaking from Experience" library of videos uses interviews with real patients who are positive role models and share their experiences of the day-to-day challenges and strategies they use to manage their illness.

### Animations

Educational animations use dynamic content to breakdown often complex information into smaller pieces in a way that engages the audience, is simple to watch and easy to understand. These cover a variety of topics and include tips and suggestions to complement the patient's care plan.

### Information Sheets

There are thousands of credible, Information Sheets developed and hosted by trusted health organisations and written for the consumer. They are easily accessed as a PDF by the recipient or printed out if the recipient prefers.

### Tools and Resources

These are useful links to credible websites, apps and helpful tracking sheets designed for use by the patient or consumer.

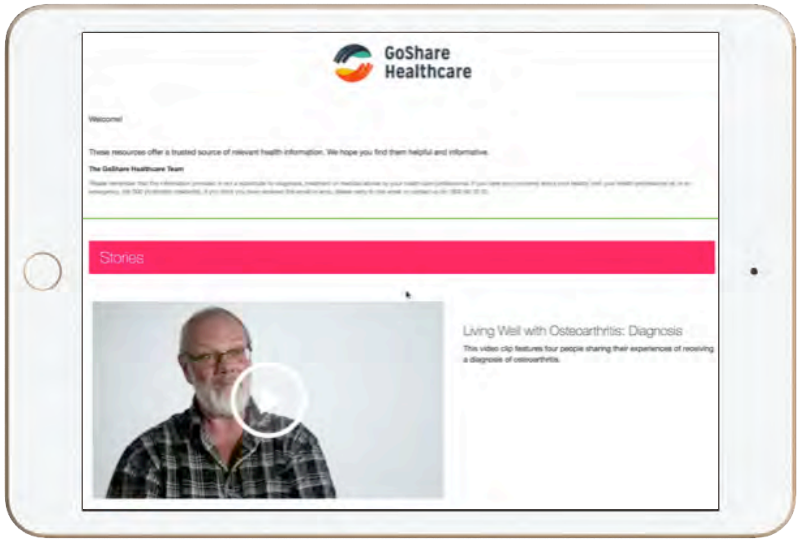
### Continuous review of content

Healthily and its peak health industry partners review video content on a rolling two-year schedule. It is updated where required to reflect the latest changes in clinical advice. Information sheets are reviewed by peak health industry partners regularly. This ensures that the health practitioner and recipient have access to the latest version of patient education information.

### Adding content and content development

New health titles are added based on input from clients and industry partners who gauge current and emerging health trends based on their data. New health titles can be created with only Information Sheets and relevant Tools and Resources.

## What the recipient sees


To be most effective, patients need to understand what they will be receiving and how to access and share the resources sent to them via SMS or email. Each time a bundle of information is sent through GoShare, a unique link is created for the recipient to access the information. The URL is always updated with the latest versions of information. The URL never expires.

The recipient will receive an email or SMS from the health organisation. It will contain a “no reply’’ instruction and will not come from a practitioner’s individual email address.

The recipient does not need a user name or password but simply clicks on the link contained in the message. The recipient will see an introductory greeting message from the health organisation and can then scroll down to access the individual content items in the information bundle.

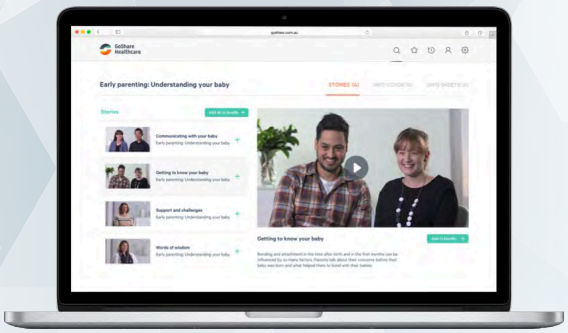
The recipient can send the link to others, including family and carers, who are assisting with their care.

The recipient can view the Go Share Privacy Policy from the link at the bottom of the email and content page. The recipient can choose to “Unsubscribe” (email) or “Stop” to opt out of the SMS.

A feedback survey can be included at the end of each bundle to assess the helpfulness of the information.

# Section 2

## Definitions and helpful information



# SECTION 2
# Definitions and helpful information

## Administration Hierarchy

GoShare is used by a range of different types of health organisations, each with its own internal structure and complexity. An administration hierarchy has been established to help navigate through the system.

There is a system of administrator levels used within GoShare to manage onboarding and off boarding either entities or users.

### Definitions

**An Organisation** is the parent organisation which has contracted GoShare with Healthily.

- An Organisation Administrator can invite a Branch Administrator or User.

**A Branch** is a Health Organisation which employs health practitioners (Users). A Branch may be a medical practice, health service, or pharmacy.

- A Branch Administrator can invite a User or create another Branch Administrator

**A User** is a health practitioner providing health care services to patients.

- A User can use all the GoShare functionality to send patient education content. A User cannot invite another User.

Onboarding is the process of registering a User or Branch through an Invitation process.

Offboarding is the process of deactivating or deleting a User or Branch.

Branches and Users are made inactive rather than deleted from GoShare.
Contact Healthily if you wish to deactivate a User or Branch.

**Phone** 03 95347222, 1800 60 33 33 or **email** support @healthily.com.au.

## Other helpful information

### Passwords

A strong password should have a minimum of 6 characters, including at least one numeric and one special character.

### Edit Account

To change your password or any other account details click the ''Cog" icon in the User Navigation Bar

### Email addresses

The GoShare system only recognises one email address for a person or entity.

### Sign in and Sign out of GoShare

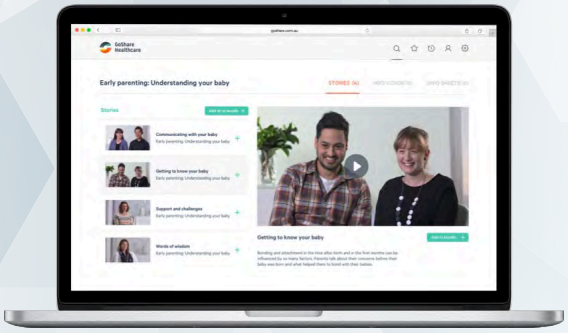
You can set up a shortcut icon by dragging the GoShare icon and pinning to your taskbar.

When you sign in to GoShare tick the "Remember Me" box and your user name and password will be saved for that computer.

Click on the "Cog" icon in the User Navigation Bar. Click on Sign Out.

# Section 3

## For the Organisation Administrator

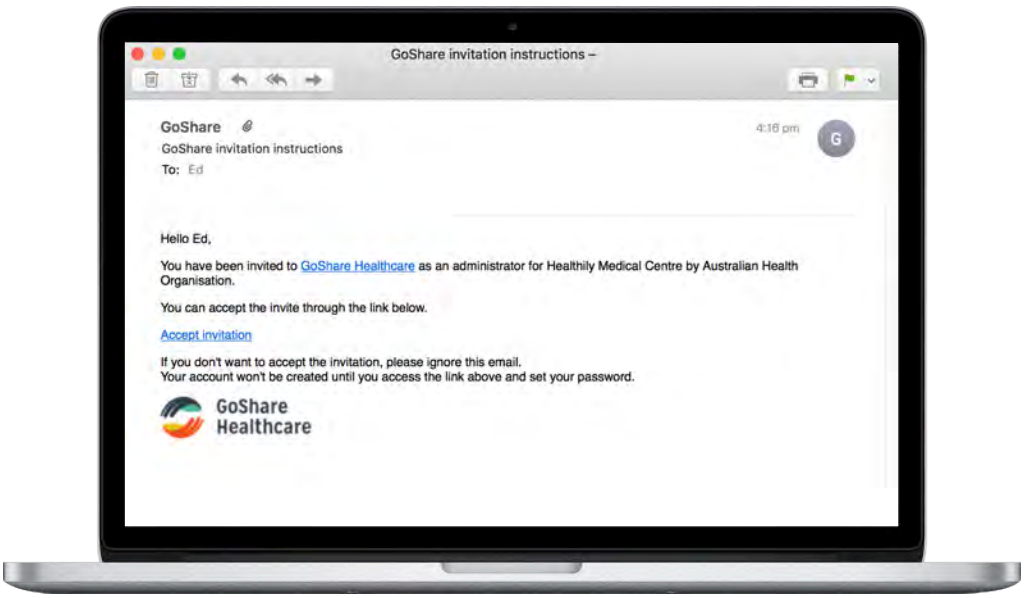


# SECTION 3
# For the Organisation Administrator

## Get Started

### Accept your invitation

You will receive an invitation email from GoShare Healthcare to be an administrator for your organisation.




Click on “Accept Invitation” link to accept. Enter password. Confirm Password.

Click on “Set my Password” to complete the account creation process.  You will land in the Organisation Administrator screen.

Across the top of the screen you will see three tabs - Organisation Details, Branches and Users.
From this Administrator screen you can invite Branches, Branch Administrators and Users.

Click on the “Menu” icon in the top left-hand corner to access GoShare or sign-out.

### Edit Account

Once you are in GoShare, you can change your password or any other account details by clicking the ‘’Cog” icon in the User Navigation Bar.

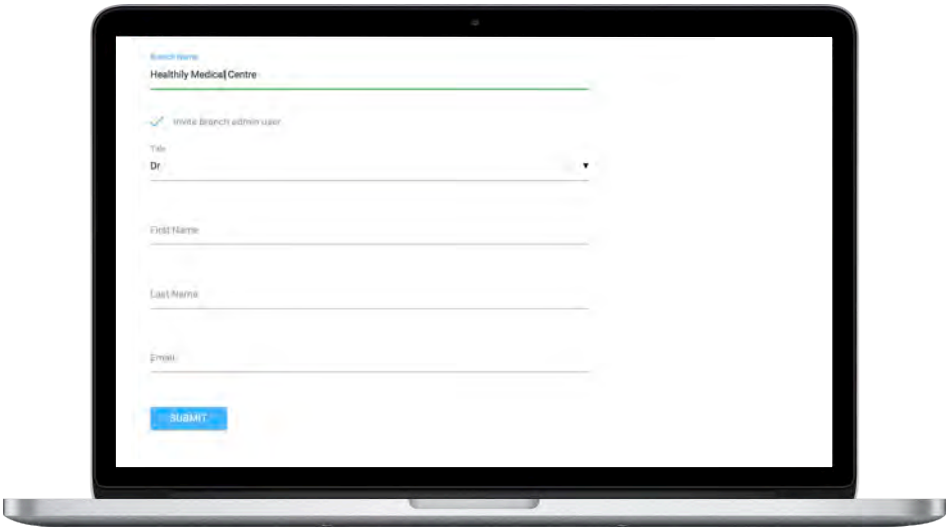
## Set up a Branch

This is where you establish a Branch in GoShare.

In the Administrator page, there are two tabs in the top of the screen – Branches and Users.
Select the Branches and click “+” in bottom right.

Enter Branch name.  The check box is ticked automatically enabling you to set up an Administrator for this Branch.  You can remove the “✓” just to set up a Branch without an Administrator.

To invite a Branch Administrator, enter details.  Click “Submit”.
An invitation email will then be sent to the nominated Branch Administrator.




**Resend an Invite**

From the Branches screen, you can view the status of the invite.  The column under “Joined” will advise whether the invitation has been accepted and give you the option to Resend Invite if required.  You can delete the User and Invitation before the invitation is accepted but not after.

## Invite a User

An Organisation Administrator can invite a User directly.  Click the “+” in the bottom right of the screen. Complete the User details and remove the “✓” from Branch Administrator role.  Click “Submit” to send the invitation.

## Reports

As an Organisation Administrator, you can access the following reports:

**From the Organisation Details tab**

User Activity report – a screen view of the number of times Users have sent information to recipients and when the recipient has first viewed the information.

Click “CSV Export” to generate a detailed report in Excel.

**From the Branches tab**

Screen view Branch Name and invitation status.  The invitation has either been accepted or not. If not, there is the option to resend invitation.

Hover over “invited” to see the name and email address of the Branch Administrator.
Click “Download Report” to generate a report in Excel.  This report shows Branch set up Status and how they have customised their email and SMS content, uploaded their logo, and their generic email.  This will also assist identifying where there is a third-party email address that cannot be authenticated.

**From the Users tab**

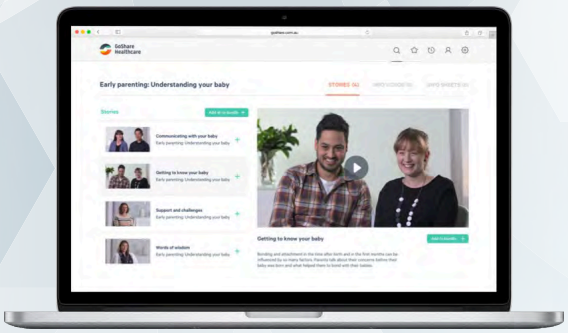
The screen view shows all Users and Administrators, invitation status, number of times signed in and last date signed in.  This will assist in high level monitoring of User activity.

You can filter your view by User, Email, Branch or “Managed by” The “Managed by” field is used to link a practice or health service to an Organisation Administrator and is filtered via the dropdown menu in the field.  As portfolios change, practices or health services can be reassigned to different or new Organisation Administrators. Email support@healthily.com.au to arrange for changes to be made.

Click “Download Report” to generate the report in Excel.

# Section 4

## For the Branch Administrator



# SECTION 4
# For the Branch Administrator

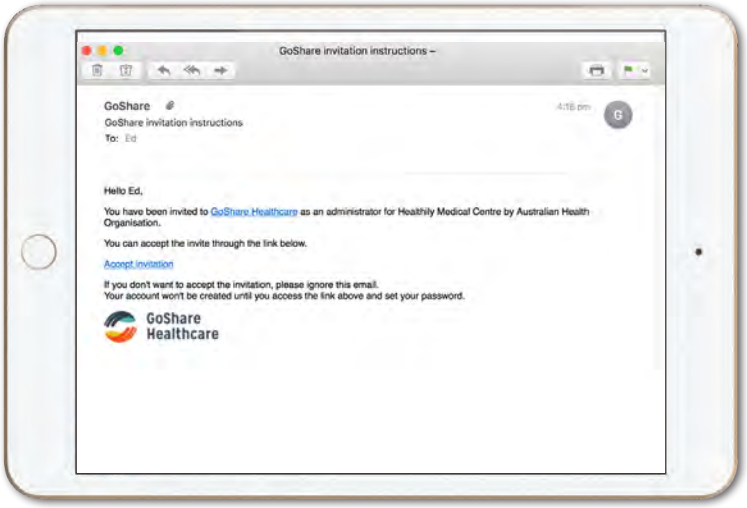
## Get Started

### Accept your invitation

You will receive an invitation email from the Organisation Administrator.

Click on Accept Invitation link to accept. Enter password. Confirm Password.

Click on “Set my Password”. You will land in your Administration area. You will see two tabs at the top of the screen – Branches and Users. The Menu icon is at the top left-hand side of the screen.



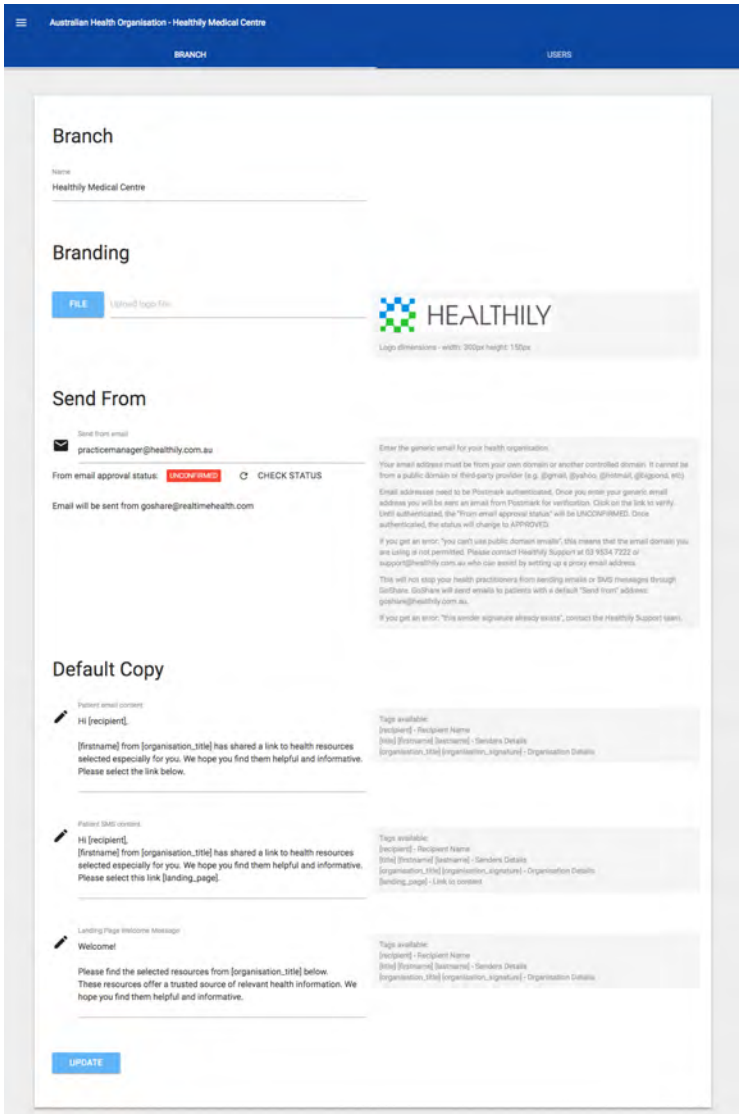

## How to customise your Branch version

After accepting your invitation, you will be taken to your Branch customisation screen to create your Branch version. There are guidelines in the right-hand column.

This page will determine what the recipient sees and reads when they receive and open their email or SMS.

Some of the information about your Branch will have been prepopulated as part of your invitation however you can edit and customise as appropriate. Where there is a word in brackets, e.g. [Recipient] these will automatically populate from the system information.

You can return to customise this page or update information or message content at a later stage by signing in to GoShare, select the “cog” icon and click on ‘’Admin” to get back to your Administrator area.




### Branch Name

This is the name given to your health organisation at set up. It may be included on the recipients email or SMS greeting when you customise this copy. You can modify your Branch name by typing in an alternate name.

### Branding

You can upload your logo in a .JPG or .PNG format. Logo dimensions are: width 300px height 150px. Contact Healthily if you require assistance in formatting or resizing your logo.

### “Send From” email address

Enter an active generic email for your health organisation. This email address should be monitored although the recipient is notified that it is a No Reply message.

GoShare requires that the “Send From” email address is authenticated by our email provider to prevent GoShare emails going into the recipients “Junk” folder. Email addresses hosted by a third-party Internet Service Provider (ISP) and on a public domain cannot be authenticated. This includes services such as Gmail, Hotmail, Yahoo, and Bigpond.

If the “Send From” email cannot be authenticated you will get a message “You can’t use public domain emails”, **contact Healthily to set up a proxy email**. Phone 03 95347222, 1800 60 33 33 or email support @healthily.com.au.

The default “Send From” email will be goshare@healthily.com.au until your email address is authenticated.

Type in your preferred “Send From” email address. The “Email approval status” will remain Unconfirmed until authenticated. This does not stop emails being sent by Users.

You will receive an email from our email provider Postmark, to verify your email. Simply click on the link to verify. The “Email approval status” will change to “Confirmed”.

### Customise the email & SMS message template to the recipient

The message has been prepopulated with default wording. You can customise the template text for both Email and SMS. This will be the template for the health practitioners in your Branch. They can further customise and personalise before they send their information to the recipient. The right-hand column explains which fields will self-populate from data in the system.

### Customise the greeting message on the recipient content page

This is the greeting message that will be first viewed by the recipient when they open their link to view the content. The message has been prepopulated default wording. You can customise this for your Branch. This cannot be further customised by the health practitioner.

When you have completed the page, click “Update” and the information will be saved. You can go back into the Branch Administrator screen at any time to modify as required.

## Invite to GoShare

### Invite a User

Click on the Users tab at the top of the screen.

Click on the “+” icon on the bottom right hand corner of the screen.

In the Invite User page, complete the User details required and click ‘’Submit”.

If a User with that email already exists, a message will appear on the screen.
An email address can only be used once. Another email address will need to be used.
If there is still a problem, contact Healthily for assistance. Phone 03 95347222, 1800 60 33 33 or email support @healthily.com.au.

If the invitation is successful, the new User will appear on the User screen.

You can click on the “3 dots” icon on the right-hand side to delete the User prior to them accepting.

You can click on “Resend Invite” at a later stage if the invitation has not been accepted.

### Invite or create another Administrator

You can assign administrator rights to another member of your organisation.

Follow the steps for Invite a User. Click on “Branch Administrator role” at the bottom of the screen and click “Submit”.

### Returning to GoShare

### Sign in to GoShare

Go to the URL **goshare.realtimehealth.com.au** or click on the GoShare icon on your desk top or taskbar and click “Sign In”. Enter email and password and click “Sign in”. You will be taken to the main content screen in GoShare. To go to your Administrator area, click on the “Cog” icon and click on Administration.

If you are in the Administrator screen, click the ‘Menu” icon in the left-hand side top of the screen and select ‘’GoShare” and you will be taken back to the main content screen. From here you can use the GoShare functionality following the instructions in this User Guide.

### Sign Out from GoShare

If you are in the Branch Administrator screen, click the ‘Menu” icon in the left-hand side top of the screen and select ‘’Sign Out”. If you are in GoShare select the “Cog” icon and click Sign Out.

## Reports

As a Branch Administrator, you have access to the following reports:

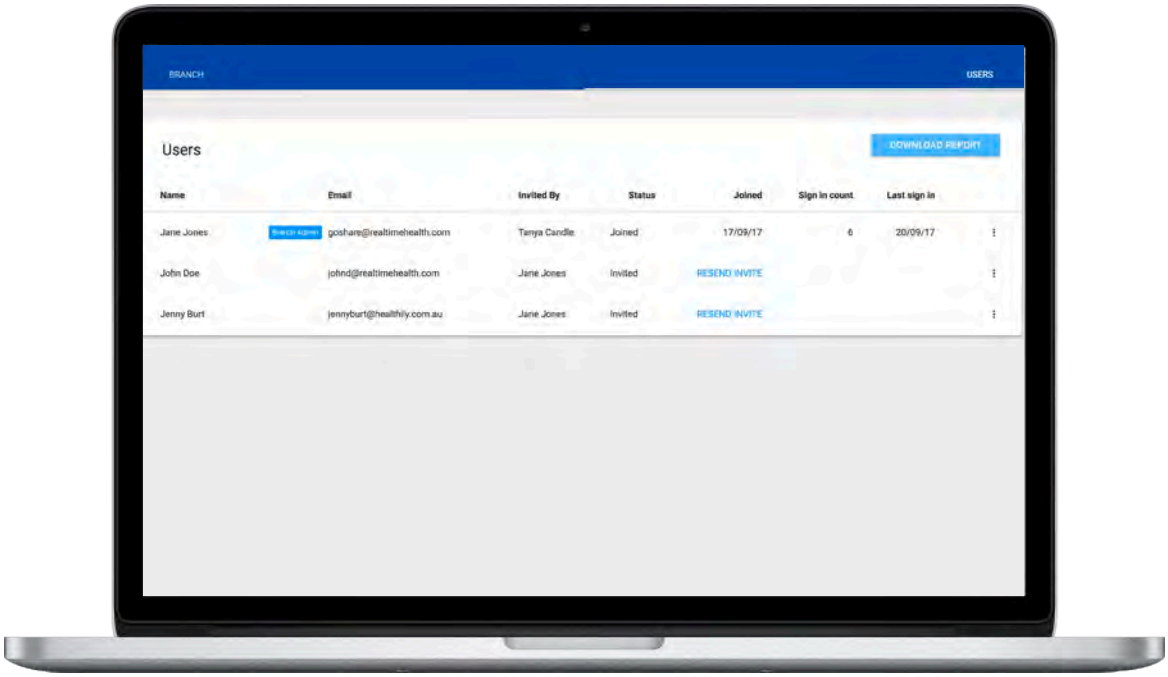
### Branch and User activity

From the User screen, you can see which Users have been invited by yourself and another Administrator (if assigned). You can see their Status as either “Joined” (and date joined) or Invited.

Where the User has accepted the invitation, and has Status as Joined, you can see the number of times they have signed-in to GoShare and the last date they signed in.

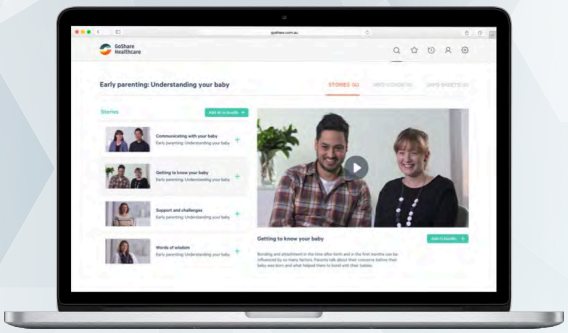
Click on “Download Report” to generate a .csv report which will open in Excel.

If you are a User as well as a Branch Administrator, please refer to Section 5 for User Instructions.



# Section 5

## For the User



# SECTION 5
# For the User

## Get Started

### Accept an invitation

You will receive an invitation email from the Branch Administrator.

Click on Accept Invitation link to accept. Enter password. Confirm Password.

Click on “Set my Password”.  You will land in your home screen.

### Setting up the GoShare shortcut icon

The GoShare icon can be dragged and pinned to your taskbar or on the Desktop.

### Sign In to GoShare

When you Sing In to GoShare tick the “Remember Me” box and your user name and password will be saved for that computer.

### Sign Out from GoShare

Click on the “Cog” icon in the User Navigation Bar.  Click on Sign Out.

## User Navigation Bar

On the top right-hand corner of your screen is the User Navigation Bar.


“Browse” icon – will always return you to the main content selection screen.

“Star” icon – will take you to the content bundle screen to create a new bundle and view saved bundles.  From here you can send your bundle.

“Clock’’ icon – will take you to the program screen to create a new program or view saved programs. From here you can send or schedule your programs.

“Person” icon – will take you to the screen to view your recipient list, what has been sent and what is scheduled in the program queue.

“Cog” icon – allows you to edit your details, change your password or sign-out.

## Send information to a recipient

Select content, create, save and send bundles

### Create a bundle

From your home screen, select a health topic by scrolling through the list or use the Search function by typing key words into the search field.

### Select the Health Topic

The content modules are in the tabs in the top right hand of your screen under the User Navigation Bar.

Select a tab and scroll down the list of content items.

Click on each item to view and select as many content items as required by clicking on the ‘+’ icon next to each item.  To remove content, click on the ‘’trashcan’’ icon.

You can see the content in your bundle is accumulating in the orange circle next to the 'star'' icon in the User Navigation Bar.

When you have finished selecting your content items, click on the 'star' icon' to view your bundle.

In your bundle screen, you can review and edit your selection.

To remove an unwanted content item, click on the "trashcan" icon.

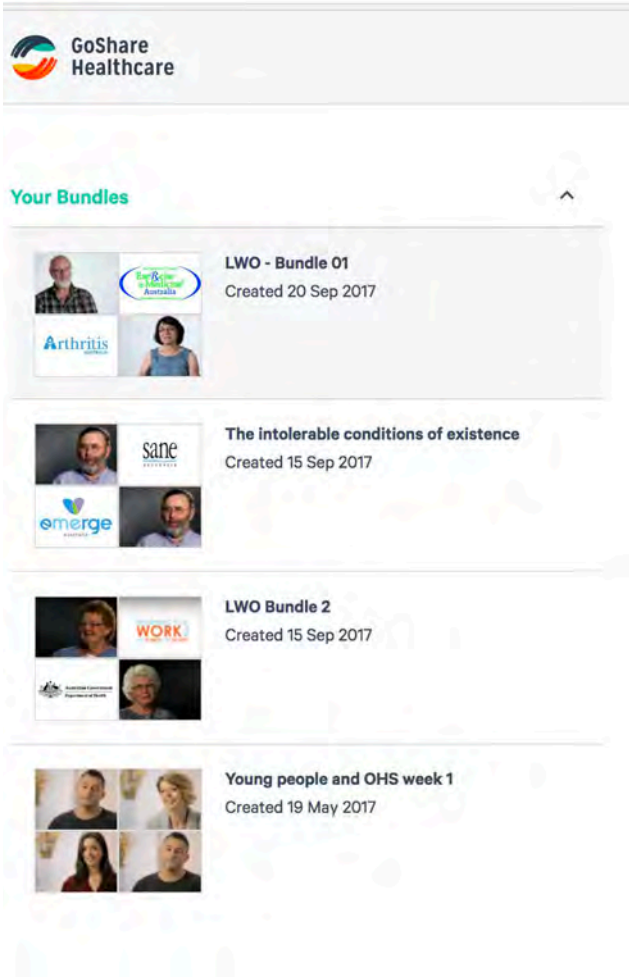
You can click on the ''Send bundle" icon to send the bundle (titled or untitled) or continue to save the bundle. If you do not save the bundle, it will disappear once sent to the recipient.

### Save a bundle for future use

If you would like to save your bundle without sending to a recipient, click on the 'Save bundle" icon. A system generated number will be created for your bundle.

To change the title, click on ''3 dots' icon next to the number. Click "Update Title", type in new title and click the tick "✓". Your saved bundle will appear in the left-hand column under Your Bundles with the new title. You can change the title at any time by selecting the bundle from Your Bundles, click on ' '3 dots' icon next to the title and repeat the Update Title process.

You can find your saved bundles at any time by clicking on the ''star'' icon in the User Navigation Bar. You cannot edit a Saved Bundle.




### Create another bundle

To create another bundle, click on the ''Browse" icon in the User Navigation Bar and return to the main content screen. Select content as described earlier.

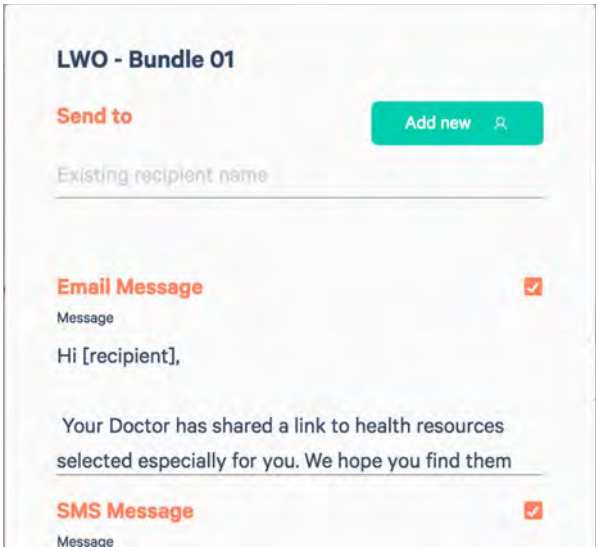
### Delete a bundle

Bring up your bundles by clicking on the ''star'' icon in the User Navigation Bar. Select the bundle you would like to delete. Click on ''3 dots' icon next to the title. Choose ''Delete bundle". The system will ask you to confirm deletion. The bundle will be deleted from Your Bundles, but still accessible to the recipient through the URL link.

### Send your bundle

From Your Bundles screen, click the "Send bundle" icon. Click "Close" to discontinue

### Send to a New Recipient




Click "Add new". Enter the recipient's name, ID (if required), Email address and/or mobile number. **Click "Done" to save.** This will create the recipients contact profile.

### Send to an existing recipient

If you have previously sent the recipient a bundle from GoShare, their first name and contact details will be retrieved when you start tying their name in the "Existing recipient name" field. Click on Email Message and/or SMS Message. You can modify the message or leave as per default text and click "Send bundle". The recipient will receive the message with their First Name in the Recipient field.

### Send to more than one recipient

You can send to multiple recipient at once by simply repeating the steps for Existing and New recipients. Each recipient will receive a unique email/SMS and content page and cannot see other recipients' names or details.

### Edit recipient contact profile

Click on "person" icon in the User Navigation Bar. Scroll to the bottom of the page, type in their name in the Search Recipients field. Potential matches will show in the drop-down box. Select the correct recipient and the name will appear in the top of the screen. Click the "3 dots" icon and select "edit recipient" to add or change any details.

### Customise your Messages

Click on ''Send bundle" in the top right of the screen and the default text messages will appear on your screen. (The default text message has been set by your Branch Administrator for all Users in your Branch. Only the Branch Administrator can change the default text message).

You can customise each message in the email and/or SMS before sending. The [recipient] field will automatically populate with the recipients first name. Simply click in the text message and delete, add or amend your message. When you have finished you can click "Close" and return to the bundle screen (your changes will be saved) or click "Send bundle".

### Create a program and schedule bundles

You can create and schedule a digital program by combining saved bundles which can be delivered to recipients over time at defined intervals.

Click on the "clock'' icon in the User Navigation Bar. Click "Create new".

To name your Program, click on the ''3 dots'' icon, select Update Title, type in new name and click to save. Your saved Program will appear in the left-hand column.

To get started, decide on the number of content bundles in your program and how these might be sequenced. Create the bundles as per the above steps. When creating a bundle for a program, each bundle should be given a topic name and number to ensure it is easy to sequence them.

### Bundle 1

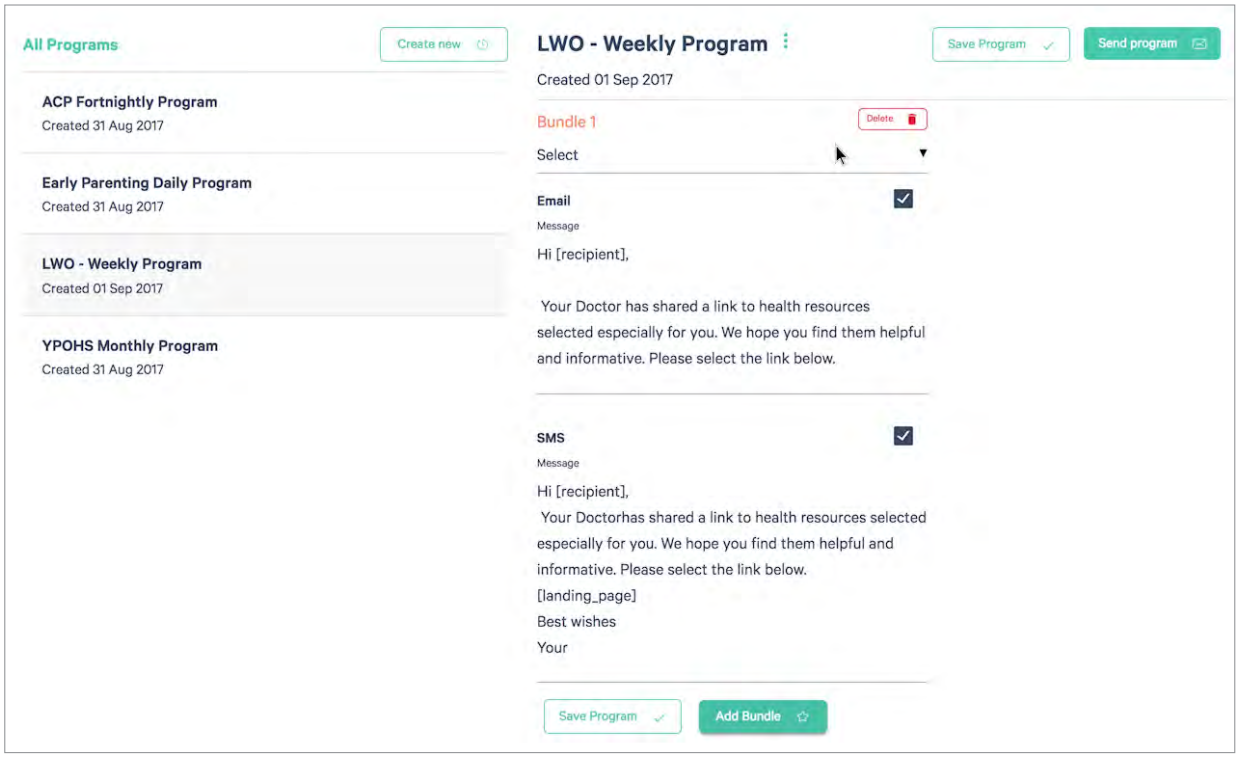
Click “Add Bundle”. Click “Select” under Bundle 1 and choose from your saved bundles.

You can customise the text message for email and SMS for this bundle. You can choose to send either an email, an SMS or both by ticking the boxes. The [recipient] field will automatically pick up the recipient’s name when it is sent.

You can save progressively after each bundle is added or continue to the completion.

### Bundle 2 and more

Scroll down and click on “Add Bundle” and Bundle 2 will appear. Click “Select” and choose from your saved bundles. Continue to add bundles and customise as required until you have completed your program.

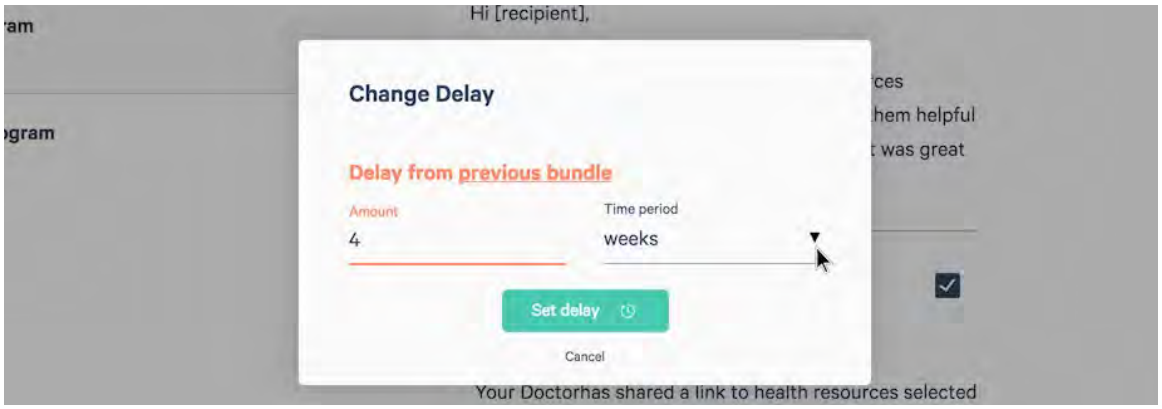



### Click “Save Program”

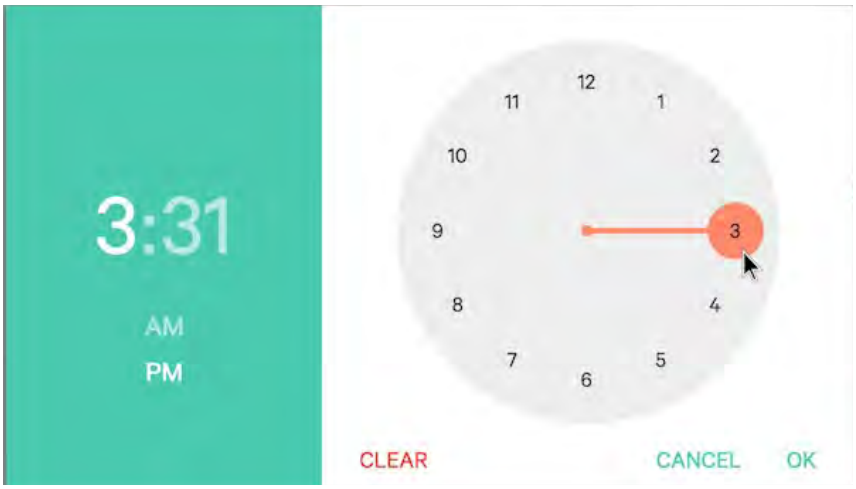
### Schedule the bundles

When you have finished adding the bundles and have created your digital program content you can schedule them (or you may choose to schedule each bundle as they are added to the Program).
The default send schedule is for the first bundle to be sent immediately on clicking “Send Program” with one-week intervals between the other bundles.

On the right-hand side, you can set the delay interval between bundles by clicking “Change Delay”, selecting days or weeks and then a number. Click on “Set Delay”. Do this for each bundle.



You can choose the time of day for the bundles to be sent by clicking “Change Time”.
A clock will appear. Select the AM PM, hour, and minute. Click OK to set the time.




When you have finished creating your program Click on “Save Program”. Your saved programs will appear in the left-hand column and can be sent at any time.

Bundle 1 will be stored in the program and sent on the day you send the program to a recipient (Change Delay set to ‘’0’’).

**Send a Program**

Click “Send Program”. Type in an existing recipient name, or add a new one.

Click on “Date to send”. The Calendar will default to the current date “Today”. Either click “OK” or change the date which will trigger the first bundle to be sent. Click “OK” to save the changed start date. Click ‘’Send program”.

## Reports

Click on the “Person” icon in the User Navigation Bar. There are two tabs in the top right of screen – Sent and Queue. In “Sent” and you can view each of the bundles sent and whether (or when) the patient has opened the link to access the information. If the recipient has opened and viewed the content, the word “Viewed” will appear on the right-hand side of the bundle with date and time first opened. Click on the down arrow to get further detail.

Your recipient list is on the left-hand side of the screen. Select the recipient and see what has been sent and whether it has been accessed.

Click on the “Queue” tab to see the bundles in your programs that have been scheduled but are yet to be sent. Click on ‘’Remove from queue” to remove any bundle from this current “send” version (this will not change the Saved Program, just this send instance). Click on “Change date” to modify the date a bundle is sent.

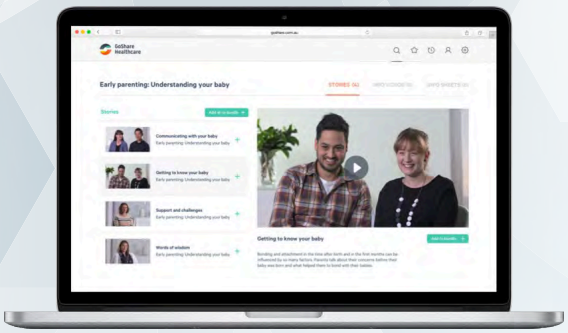
To generate a report, scroll to the bottom of the screen and on the left hand side click either ”Queue Report” or “Sent Report” to create a .csv file will be produced and viewed in Excel.

## Provide Feedback

On the right of the screen is a Feedback tab. Click the Feedback tab, select Problems, Suggestions, Compliments or Other, and fill in the text box. Click Send Feedback.
Your feedback will be received by the Healthily team via the monitored email.

# Section 6

## Frequently Asked Questions



# SECTION 6
# Frequently Asked Questions

***Does GoShare have any commercial sponsors or partner with medical supplies or pharmacy companies?***

- **GoShare** does not have any commercial sponsors or promote information from medical supplies or pharmaceutical companies to develop content. Our partners are accredited, national and international peak health bodies. We use their information and other resources from State and National Government authorities.

***Are the people in the Speaking from Experience videos actors?***

- The people in the videos are not actors but are people in the community who have experienced an illness or health journey that they are willing to speak about.

***Can I add my own content?***

- Yes. Any individual or Branch-based content can be added but would need to be approved by the Health Organisation contracting **GoShare**. This information would then be uploaded by Healthily and would be available to all Users.

***Can regionally-based content be added?***

- Yes. Regionally-based content can be added or a link created. This would need to be approved by the Health Organisation contracting **GoShare** and would be available to all Users.

***Can I download the videos?***

- No. The Patient Stories are from the Speaking from Experience series produced by Healthily Pty Ltd in collaboration with the relevant peak health organisation. They can only be viewed through access to **GoShare** on the health practitioner's computer screen or via the email/SMS link.

***How do I access GoShare most efficiently?***

- The **GoShare** icon can be dragged and pinned to the Taskbar at the bottom on your computer screen. The computer can remember your user name and password so that when you next want to access **GoShare** it is automatic. You can Sign In in the morning and have **GoShare** active in the background all day so that all you do is click on the Taskbar icon. Sign out at the end of the day.

***Can the recipient reply to the email or SMS?***

- The email or SMS will include a "No Reply" instruction.
  If a recipient does reply it will go back to the Branch generic email address.

***Can the recipient see the senders personal email address?***

- No. The recipient will receive the email from the generic Branch email address that has been input into the customised Branch **GoShare** version.

***Is the data secure?***

- **GoShare** is hosted on a highly secure server located in Sydney. The only information collected is for the purpose of sending the content to the recipient: the recipient's name, email address and/or mobile phone number. The URL link is securely stored for ongoing access by the recipient and for monitoring by the User. **GoShare** does not collect, store, use, disclose or transfer health information within the meaning of the Privacy Act 1988 and the Health Records Act 2001. GoShare has robust security and privacy policies. The Privacy Policy can be accessed on the GoShare website.

***Who can see what information has been sent to a recipient***?

- The patients details and digital content sent to that patient can only be seen by the health practitioner.