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Welcome to the Medgate Portal

The Medgate Portal allows you to:

- schedule clinic visits
- communicate with your health center's practitioners
- view and complete online questionnaires, assigned inspections, and surveys
- view your medical records
- submit incidents.

When you first log in, you will be on the Home page:

Click on an icon to move to a different module. The module you are in is shown with an orange icon.

The Dashboard shows your notifications and messages by date. The icon reflects the module the item relates to. Click on an item to open it.

Initially you will see a placeholder image; click this area to change your settings (including adding or changing a photo) or to logout.

This area displays any company-related messages; and may include a corporate data metric that the company has shared with portal users, e.g. number of injury-free days.

Note Users logged in as Guest will not see Dashboard items, and can only respond to online questionnaires and report incidents.



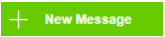
Working with Your Inbox

The Inbox displays notifications sent to you, and also allows you to send messages to clinicians, physicians, and other scheduling users at your primary health center (and those at your secondary health center, if defined in your [settings](#)).

When one of these users sends you a message, you will receive an email at the address defined in your employee record in the database, and a notification appears in your Inbox. If you do not wish to receive a separate email message, or wish to receive them at a different email address, [change your settings](#).

A “conversation” is a collection of responses to a particular message. All conversations are listed on the left. A vertical orange bar indicates there is an unread message in that conversation. Enter text in the search box in the top right to find a particular message.

To start a new conversation

1. Click .
2. Select the recipient(s) in the *To* field.
3. Enter the subject and body. To add an attachment, click the paper clip.
4. Click **Send**. The conversation is added to the list on the left.

To respond to an existing conversation


1. Select the desired conversation in the list on the left. The history of the conversation appears on the right.
2. In the box at the bottom right, type your response. To add an attachment, click the paper clip.
3. Click **Send**.

To delete all messages in a conversation

1. Select the check box beside the conversation in the list on the left.



(If you want to review the history of the conversation first, click the conversation outside of the check box to view the messages on the right.)

2. Click . Remember that this deletes all messages that are part of that conversation; deleted messages cannot be retrieved.



Completing Your Tasks

The myWork view displays items that have been assigned to you to complete. These items will also appear in your Dashboard, and can be opened from either location. The information shown for each item is read-only. Click on an item to open its corresponding form.

The color of the icon reflects the item's status. You can click a link to filter the list by status, e.g. view only items that are Upcoming, or Due.

Items can include:

Surveys



A survey can come from the following suites:

- Safety
- Environmental
- Ergonomic

Click to open the questionnaire. If a question has an image attached to it, it displays in an enlarged form.

Audits



This displays any audits or inspections assigned to you to complete.

Actions




Actions may be assigned based on findings in various Medgate modules.

Online questionnaires



Online questionnaires are not directly assigned, but you may be asked to complete one (e.g. verbally, via Inbox message, via email, etc.). These only appear in your myWork view *after* you have selected the questionnaire.

To select and begin a new questionnaire, click . Select the questionnaire and click **Begin**. Complete the questions, using the arrows at the bottom to move to the next or previous page. If a question has an image attached to it, it displays in an enlarged form. To close the questionnaire and return to the myWork view, click **Save and Leave Survey**. If all questionnaires were not answered, you can click the entry to resume (tip: click **Next Unanswered Question**).



Scheduling Clinic Visits


The Scheduling view allows you to schedule yourself for clinic visits. If you are a supervisor, you can also schedule clinic visits for the employees who report to you.

You will receive a notification in your Inbox when you are due for a visit, or to alert you to any changes in existing appointments.

The portal calendar is linked to the health center, so appointments will appear in both places.

You cannot enter an appointment in the past.

To schedule a clinic visit for yourself

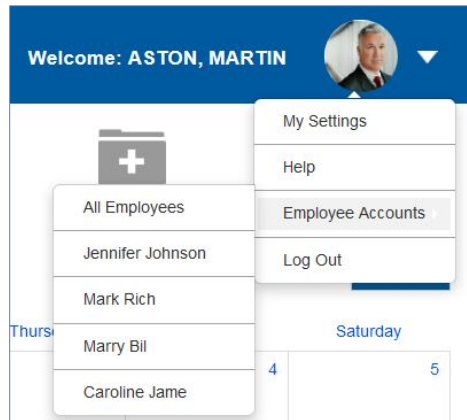
1. Click , or click on a date in the calendar.
2. Select the *Activity* (the reason for the clinic visit).
3. Select (or change) the *Date*, and enter the start time (*From*). The duration (*To*) defaults to one hour, unless otherwise specified for the selected activity. The *From* and *To* times must fall within the clinic's hours of operation.
4. Enter any notes and click **Create**.

The appointment request will have a Pending Approval status (orange text, hourglass icon) until it is approved by the health centre scheduling user. When the appointment is approved, the color of the visit changes to green with a checkmark icon. If the appointment is rejected, the color of the visit changes to red with an x icon.

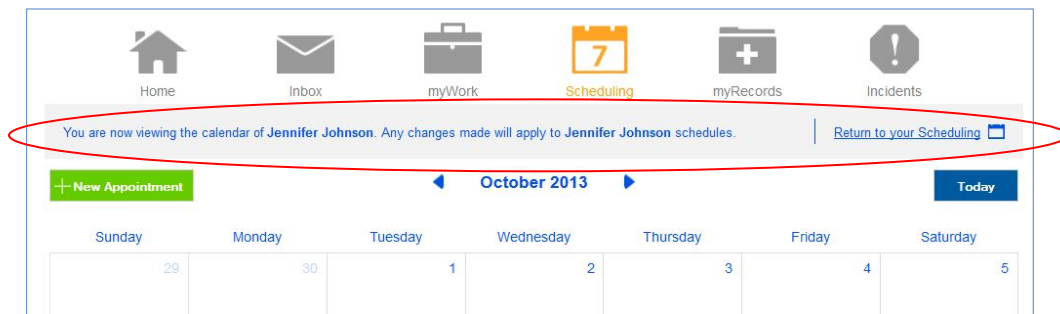
13	14 ✓ 13:00 Portal- O...	15
20 ✗ 13:00 ***Acrylo...	21	22 ⌚ 13:00 Blood Lead

To schedule a visit for a subordinate

Click your photo in the top right, choose **Employee Accounts**, then choose the employee. Only the employees who have you listed as their supervisor are shown.



The calendar refreshes and displays that employee's calendar. A message above the calendar reminds you whose calendar you are viewing. To return to your own calendar, click **Return to your Scheduling**.



Create an appointment as described on page 4.







Note Select **All Employees** to display the cumulative calendar of all employees who report to you. When you create a new appointment for an employee, the Employee field defaults to the employee name; if you are viewing the calendar for All Employees, you can create an appointment but must select which employee the visit is for.



Viewing Your Records

Note myRecords is only available to users who use LDAP or SSO login authentication.

The myRecords view allows you to monitor the following types of information from your medical records (your company may not show all types):

	albuterol (ALB) RX / Medications	Dose: Medication Frequency: Duration: Ordered By: Lewis, Donna End Date: Aug 31,2013	Aug 01,2013
	Blood Lead Lab Results	Result: Units: Result Flag: Lab Range: Comments:	Nov 16,2012
	monoamine oxidase inhibitor (117) Allergies	Notes: More testing may be required	Aug 01,2013
	Influenza Immunizations	Immunization Results: Negative Result Date: Aug 13,2013 Vaccine: Notes:	Nov 07,2011
	Physical Exam Appointments	Duration: Health Center: Advanced Occupational Healthcare Provider: Smith, Ann Notes: This is a very long note for a clinic visit. This is to assert that this person has some serious iss...	Jan 24,2013
	Blood Pressure Indicators	Click this row to generate report/graph	
Indicators available: Blood Pressure, BMI, Height, Pulse, Weight, Respiration, Temperature			


Click a row other than Indicators to open the corresponding form, or click the Indicators row to generate a report/graph.




Viewing or Reporting Incidents

Use the Incidents view to quickly record and report accidents and events. These may be an incident (with or without related injury or illness), suggestion, or observation. The event may include documents or pictures.

To report an incident

1. Select the module (you may have access to Environmental and/or Safety), then select the type of incident you are reporting.
2. Complete the fields to the best of your ability. If a questionnaire is associated with the selected event type, it may be included at the bottom of the form.
The form may allow you to attach a document: click **Save** first, then click  to attach the document.
3. Click **Submit**.

To report another incident in the same module, click **Report an Incident**. To report an incident in a different module, click  again.

To view reports you have submitted, select the appropriate module and click **Previously Submitted**. You can use the box above the Date to search through your submitted incidents.

Changing Your Settings

Click your photo in the top right, then choose **My Settings**. You can change the following:

- Change or delete the photo shown in the top right corner. If you delete the image, a placeholder image will be shown.
- A copy of your Inbox messages is sent to the email address defined in your employee record in the database. If necessary, change the email address to be used. If you do not want Inbox messages to be sent to your email, clear the *Send Email for Inbox Messages* check box (you don't have to delete the email address). The messages will still appear in your portal Inbox.
- The address and phone numbers are populated from your employee record in the database; change them here if necessary (the database will also be updated).
- Your *Primary Health Center* is populated from the database and cannot be changed. If you need to correspond with practitioners at another location, enter the *Secondary Health Center*. When you create a new conversation, you will be able to choose from users at both health centers.
- Appointments will be scheduled at your Primary Health Center. If you need to schedule an appointment at your Secondary Health Center (e.g. if you are travelling to another location), select the *Use Secondary Health Center for Scheduling* check box (and make sure a *Secondary Health Center* is entered). Note that when this check box is selected, you will not be able to schedule at your Primary Health Center.