SmartLinkO2.com Onboarding for DME Site Administrators

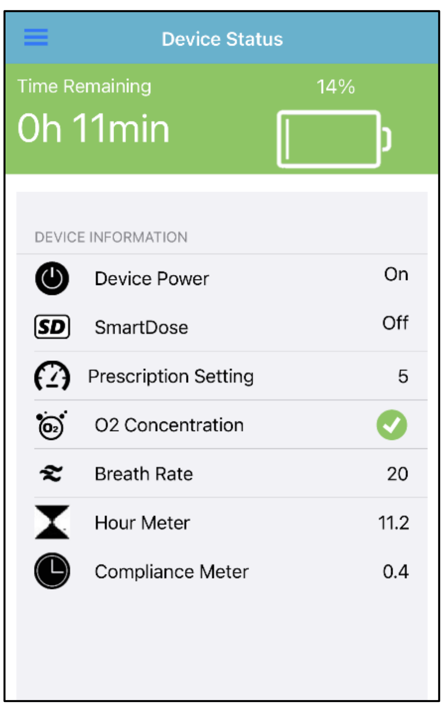
Purpose: This document provides information to DME site administrators about using the SmartLink02.com website.

Roles:

- User: A user is a member of the dealer/provider organization. The user will log in on the SmartLinkO2.com website.
- *Patient: The end user of the iGo2 POC with Bluetooth connectivity. The patient will also use the SmartLinkO2 app to view performance information about their iGo2 concentrator.*
- SmartLinkO2@drivemedical.com: A member of the DDH Customer Service Team.

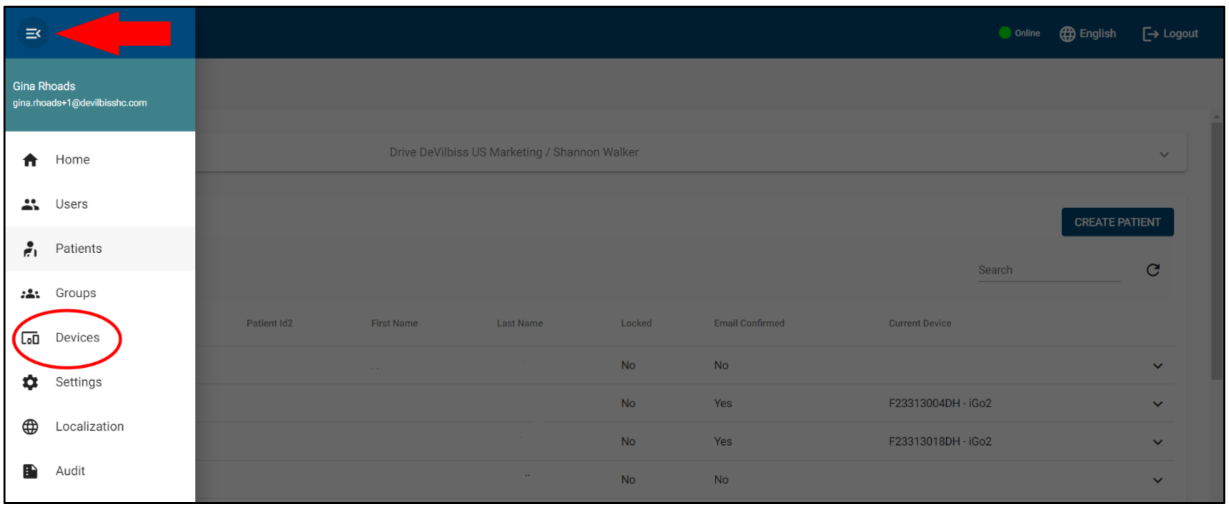
Connecting the SmartLinkO2 App:

1. The patient will connect their iGo2 concentrator to the smartphone through the SmartLinkO2 app.
2. After connecting to the SmartLinkO2 app, the patient can view select performance data the iGo2 concentrator sends to the SmartLinkO2 website.

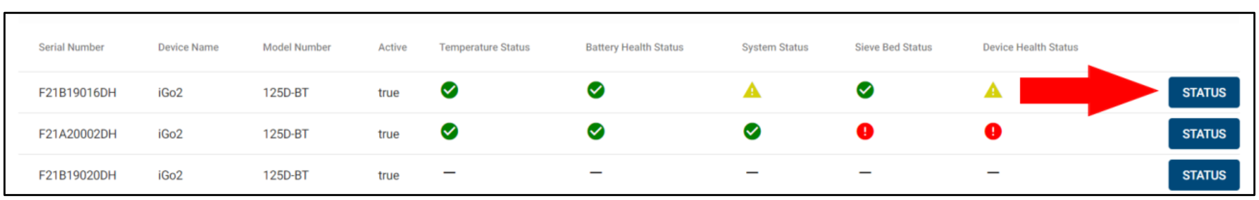


3. If the patient has questions about the data displayed in the SmartLinkO2 app, the patient should be directed to contact the dealer/provider from which they received the iGo2 concentrator.

4. The dealer/provider will login to the SmartLinkO2.com website. The default page displayed is the Patient list. **NOTE**: When a list is displayed on this and other pages on SmartLinkO2.com, the list can be sorted in ascending/descending order by clicking the label at the top of the list (i.e. Last Name). Clicking the list will sort the list in ascending order (i.e. A-Z). Clicking the list a second time will resort the list in descending order (i.e. Z-A).
5. The dealer/provider can scroll through the list to see the patients. Alternatively, the dealer/provider can enter search criteria (i.e. patient last name) into the search option located at the top-right area of the patient list.
6. If the dealer wants to view all devices and see a quick list of devices with alerts, the dealer should use the menu (located in the upper-left corner of the page) and select DEVICES.



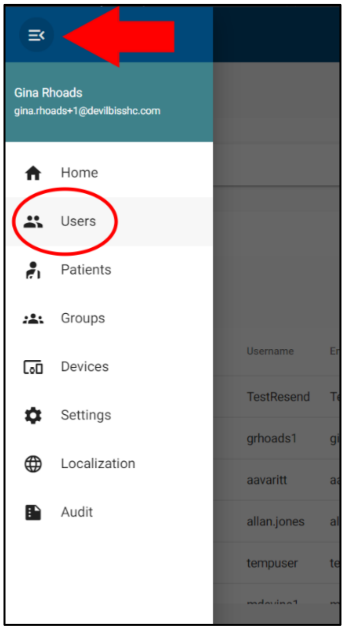
7. On the devices page, the dealer/provider can see devices and alert symbols for devices shown in the list. The Devices list can be sorted by selecting the desired label at the top of the list. If the dealer wishes to see more detailed information on a certain device, they should click the Status button on the lefthand side of the screen corresponding to the device they wish to view.



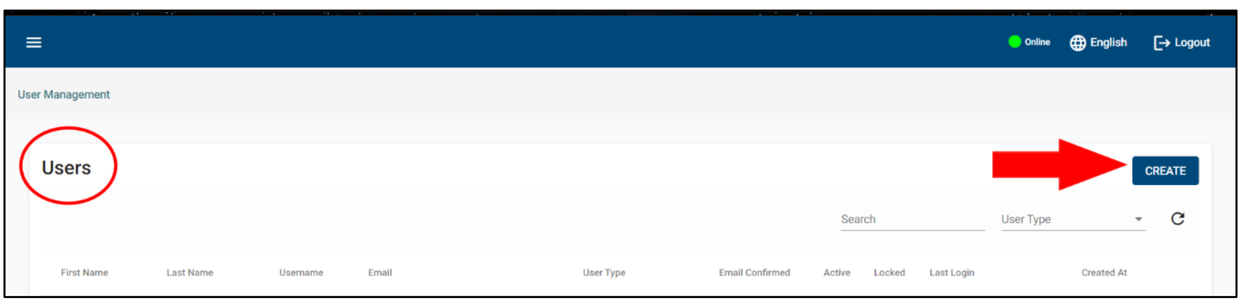
Serial Number	Device Name	Model Number	Active	Temperature Status	Battery Health Status	System Status	Sieve Bed Status	Device Health Status	
F21B19016DH	iGo2	125D-BT	true						STATUS
F21A20002DH	iGo2	125D-BT	true						STATUS
F21B19020DH	iGo2	125D-BT	true	–	–	–	–	–	STATUS

Creating a User

1. Logging in as a DME site administrator, navigate to the User page.



2. In the upper-right portion of the page, click the create button.

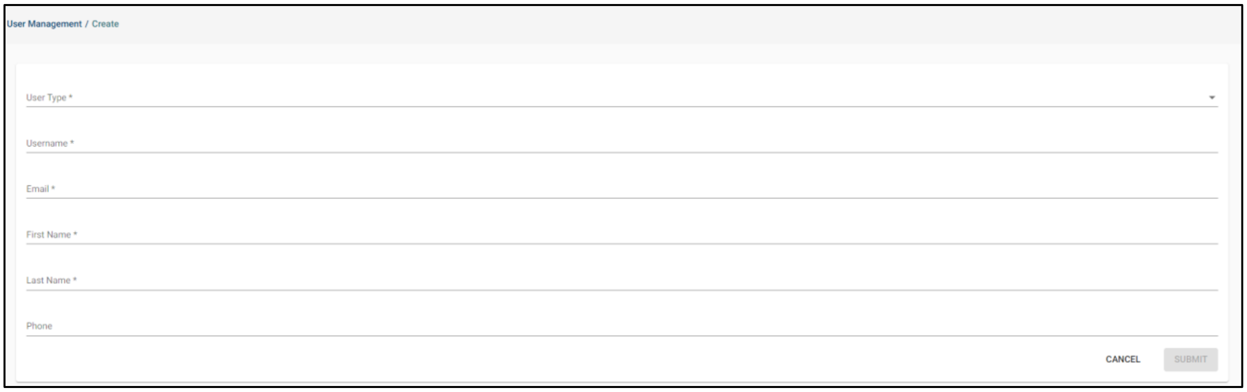


3. Select the type of user you wish to create.
    a. Tenant Admin: This user has full privileges on your organization's SmartLinkO2.com account. They create, edit, delete patients, assign devices, and view device data. A tenant admin has access to the Audit data/screen. This allows this user to see the identity of the user that created, modified, and viewed patient information. Tenant admins can set up groups where you can place patients and users in groups, in case there are users or situations where certain users should only see, view, or have access to particular patients. Tenant admins can modify any translations in the software if they find something is incorrect or needs stated differently by accessing the Localization menu item. Tenant admins can access the Settings menu item where they can set the default language of the application for all their users, add values for the generic patient fields that they might find more useful for their needs, and change the date format. **NOTE**: It is strongly recommended that this level of user is limited to your DME Site Administrator and their assistant. A backup to the main admin is good practice and will prevent challenges if the main administrator is unavailable.

b. Tenant Regular User: This user has privileges that allow them to add, view, edit, and delete information.

c. Tenant Read-Only User: This user can view information only.

4. Complete the fields for the information related to the user being created. When complete, click submit. Fields marked with an asterisk will require entry.



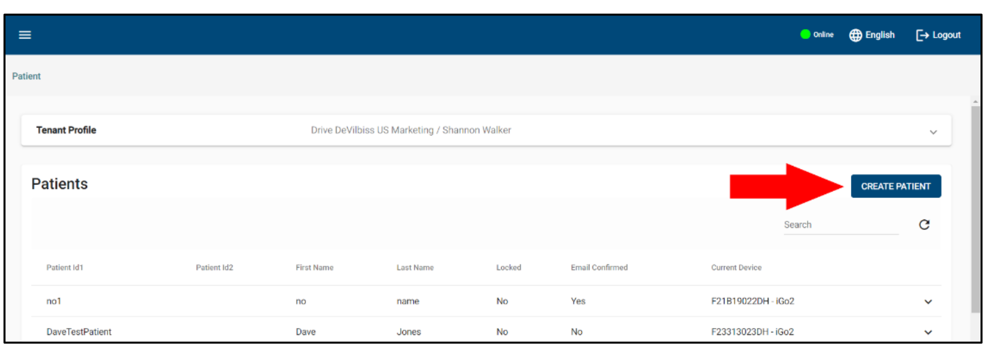
5. After you submit the user creation request, your SmartLinkO2 site will send an email to the email address you entered for the user. In the email, there is a link the recipient must select. This will take the user to your organization's SmartLinkO2 site. The user must create a password and follow the on-screen prompts to complete their user account creation. **NOTE: <u>The link in the email is valid for only 5 days after it is created</u>**. If the user does not confirm their account invitation (what happens?)
6. If you want to abandon a user you started to create before it is completed, click the CANCEL option at the bottom of the page.

Creating Patients

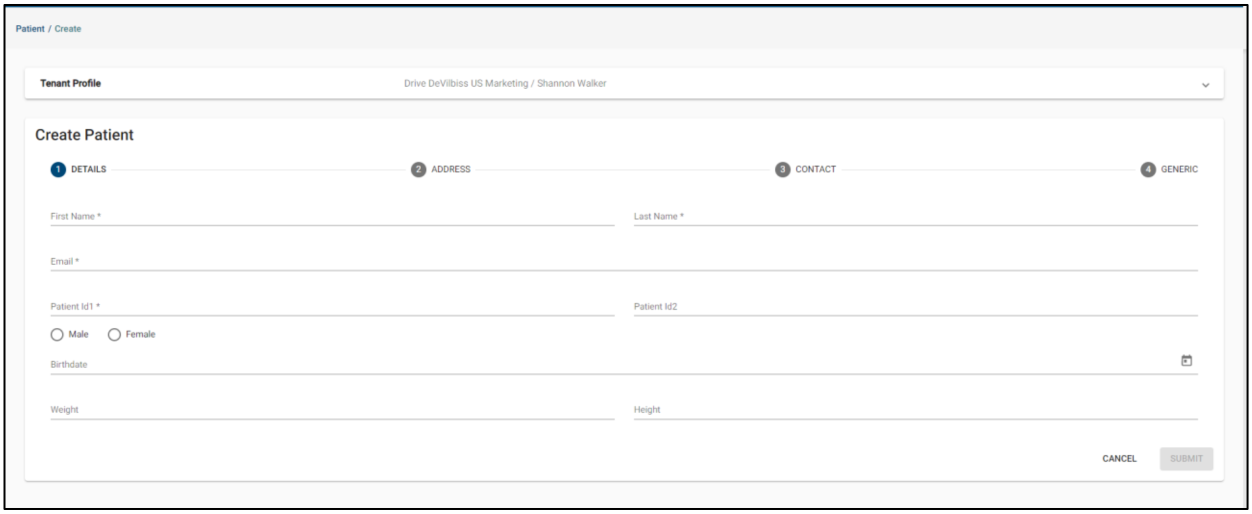
There are two options for creating patients. These will be addressed separately below.

DME Site Administrator Patient Creation

1. Logging in as a DME Site Administrator, navigate to the Patients page.
2. In the upper-right portion of the page, click the create button.



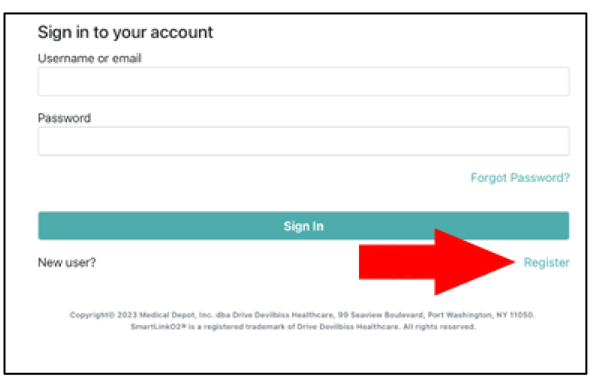
3. Follow the on-screen prompts to create the patient. **NOTE**: There are four tabs of information that can be added for the patient. Mandatory data fields are noted with an asterisk.



4. If you want to abandon a patient creation activity before it is completed, click the CANCEL option at the bottom of the page.
5. After you submit the patient creation request, your SmartLinkO2 site will send an email to the email address you entered for the patient.
6. The patient will open the email. This can be done on their smartphone or on a computer/tablet. In the email, there is a link the patient must select. Selecting the link in the email will open the browser and the SmartLinkO2.com website. **NOTE**: **<u>The link in the email is only valid for 5 days</u>** after it is created. If the user does not confirm their account within 5 days, a DME Site Administrator of your organization will need to resend the email invitation.
7. The patient will follow the onscreen prompts to create a password and accept the terms of use.
8. The patient can then open the app on their smartphone.
9. The SmartLinkO2 app will display select performance information for the patient’s concentrator.

Self-Registration by the Patient

1. The patient must download SmartLinkO2 app.
2. With the SmartLinkO2 app open, the patient selects the register option at the bottom of the opening screen.



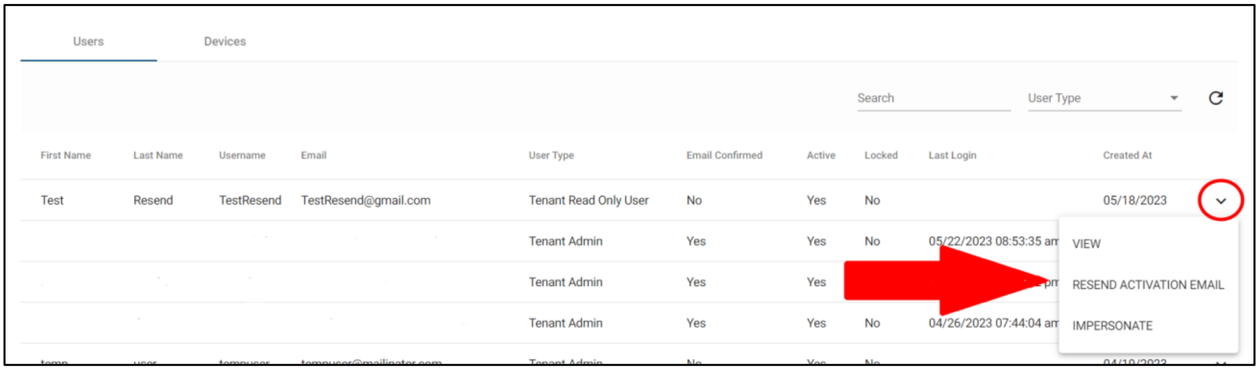
3. The patient follows the on-screen prompts for adding their information and submits their registration.

4. The site user navigates to the Patient's page.
5. The site user clicks the Create option in the upper-right corner of the page (see *DME Site Administrator Patient Creation* image for reference).
6. The DME Site Administrator adds the patient information, making certain they **exactly match the email address the patient used** when they created their account.
7. The SmartLinkO2 website will match the patient with the same email address and list this patient and their device in that organization's account.

Resending Email Invitations

If a user or patient fails to respond to an email before the invitation expires, a new invitation will be needed. A user with tenant administrator privileges can resend the email invitation using the steps outlined below.

1. Logging in as a DME Site Administrator, navigate to the Patients or User page.
2. Find the patient or user from the list displayed to whom the updated invitation is to be sent.
3. At the far right-hand side of the screen, click on the down arrow to display a list of options.
4. Select the RESEND ACTIVATION EMAIL option.



5. The system will prompt the administrator to confirm the request to send the activation email.
6. To confirm and send the email, select YES.
7. To cancel the email request, select NO.
8. The system returns the administrator to the list of patients or users.

Editing Information

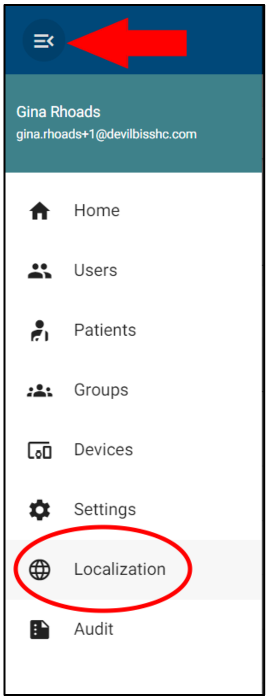
A user with Tenant Administrator or Regular User privileges can edit information for users, patients, and devices associated with a patient. **NOTE:** Users with Read-Only privileges will not be able to edit information for other users or patients.

1. Navigate to the page for which you want to edit information on a user or patient. To edit information for a user, navigate to the USERS page. To edit information for a patient or device, navigate to the PATIENTS page.
2. Find the user or patient from the list shown on the screen. At the far right-hand side of the screen, click on the down arrow to display a list of options.
3. Select the EDIT option.
4. The system will open the file for this user or patient.
5. Modify the information for the user or patient as needed and click SUBMIT.
6. The system will save the user or patient file with the updated information and return the user to the list.

Localization

Within the SmartLinkO2 website, there are approximately 400 data fields. The DME Site Administrator can modify the label (name) of the data fields to reflect local syntax.

1. Login as a DME Site Administrator, from the main menu, select the LOCALIZATION option.



2. The system will display the data fields.
3. Find the data field(s) to update the label associated with this data field.
4. Select the data field to be updated.
5. Modify the data field label(s) as desired.
6. To accept the data field label(s), click the SUBMIT button.
7. To return all data fields to their original setting, select the RESET option.

Deleting Information

A user with Tenant Administrator or Regular User privileges can delete information for users, patients, and devices associated with a patient. **NOTE**: Users with Read-Only privileges will not be able to delete information for other users or patients.

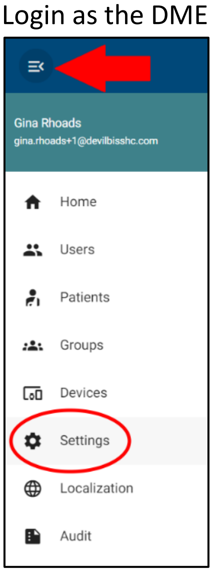
1. Navigate to the page for which you want to delete information on a user or patient. To delete information for a user, navigate to the USERS page. To delete information for a patient or device, navigate to the PATIENTS page.
2. Find the user or patient from the list shown on the screen. At the far right-hand side of the screen, click on the down arrow to display a list of options.
3. Select the DELETE option.
4. The system will display a message asking you to confirm the deletion request.
5. To confirm the deletion request, click YES.
6. To cancel the deletion request, click NO.
7. If the deletion request is confirmed, the record for the user/patient will be deleted and the system will display the list with the record removed.
8. If the deletion request is canceled, the record for the user/patient will not be deleted and the system will display the list with the record retained.

Groups

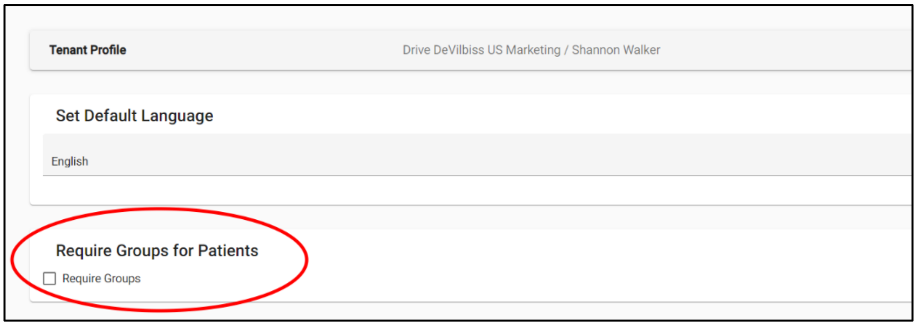
SmartLinkO2.com provides a feature that allows patients to be grouped. This capability is found in the menu as GROUPS. The DME Site Administrator must enable the groups option for this manner of categorization to be used. Once groups are enabled, a group can be set up based on criteria that best categorize the patients in the group. Groups may also be helpful if a DME Site Administrator wants to limit the display of patients viewed by users. The system also allows for parent and child groups. Child groups are subordinate to a parent group. Some examples of groups include the following:

- Assigned Therapist (i.e., John's Patients)
- Location of the patient (i.e., North part of the city, Veteran's Group Home)

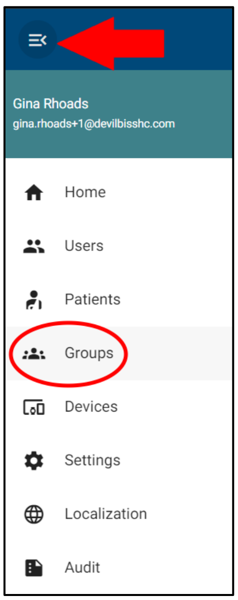
1. Login as the DME Site Administrator and navigate to the SETTINGS page.



2. Under the setting REQUIRE GROUPS FOR PATIENTS, check or uncheck the box REQUIRE GROUPS. Checking the box will require patients added to the system to be assigned to a group. Unchecking the box will remove the requirement for a patient added to the system to be assigned to a group.



3. If the Require Groups box is checked, a single or multiple groups can be defined.
4. Navigate to the GROUPS page within the main menu.



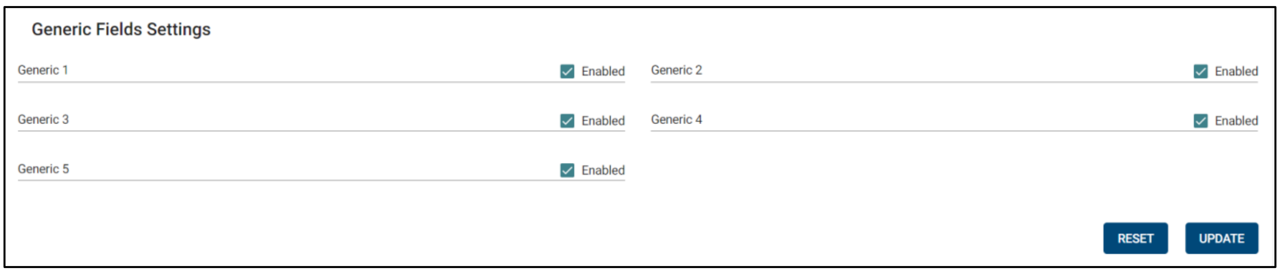
5. At the far right-hand side of the screen, click on the CREATE option.
6. Follow the onscreen prompts to create a group. Prompts with asterisks will require an entry.
7. If the group being defined is a parent group, no entry into that field is necessary. If the group being defined is a child group, set up the parent group first then set up the subordinate child group.
8. To complete and save the group to the system, click the SUBMIT button.
9. To cancel the creation of the group and not save it to the system, click the CANCEL button.

Generic Field Settings

Within the SmartLinkO2 website, the DME Site Administrator can enable up to 5 generic fields. Once enabled, a generic field(s) will be available for all patients within the customer account. The default settings for all 5 generic fields to be enabled with the field label of Generic Field 1 – Generic Field 5. Examples of generic fields that might be used include the following:

- Emergency Contact Name
- Emergency Contact Phone Number
- Secondary Contact
- Secondary Contact Phone Number

1. Login as the DME Site Administrator and navigate to the SETTINGS page (see *Groups* for reference)
2. Scroll down to the GENERIC FIELDS SETTINGS



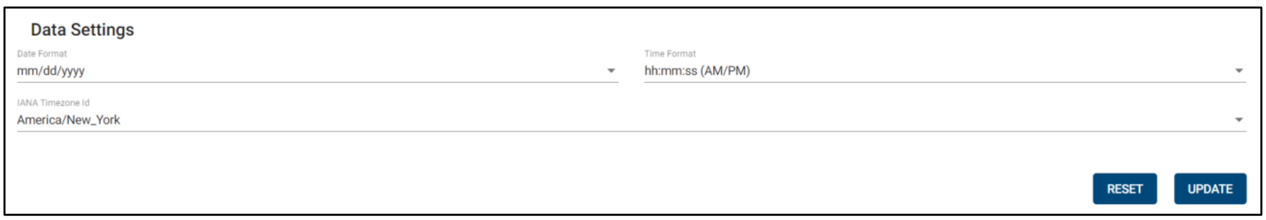
3. To enable a generic field, check the checkbox for the desired field. To disable a generic field(s), uncheck the checkbox for the field to be disabled.
4. Add a description to the generic field(s) that are enabled.
5. When the entries for the generic field(s) entries are ready for use, click the UPDATE button.
6. To remove previous entries for Generic fields and return to the default setting with all 5 generic fields enabled and descriptions of Generic Field 1 – Generic Field 5, select the RESET button.

Data Settings

Within the Settings, there is an option called DATA SETTINGS. The data settings allow a DME Site Administrator to set the Date Format, Time Format, and Time zone. The default options for these data settings are noted below.

- Date = mm/dd/yyyy
- Time = hh:mm:ss (AM/PM)
- Time zone = America New York

1. Login as the DME Site Administrator and navigate to the SETTINGS page.
2. Scroll down to the DATA SETTINGS.



3. To select a date, time, or time zone format, at the far right-hand side of each option, click on the down arrow.
4. The system will display a list of options for the data field.
5. Select the option desired for the data field.
6. When the desired option has been selected for all data settings, click on the UPDATE button.
7. To remove previous selections for data settings and return all fields to the default settings, click the RESET button. **NOTE**: Selecting the reset option after data actions have been added to the system will result in those data actions being updated to the data settings saved to the system.

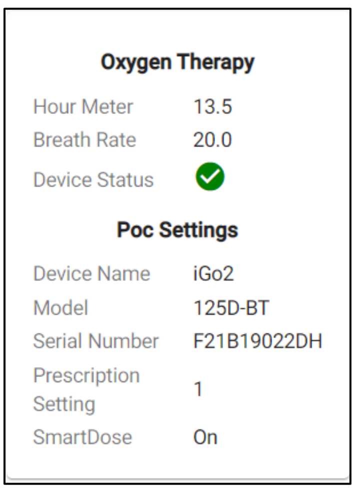
Remote Fleet Monitoring

Users on the SmartLinkO2 website can monitor performance data of concentrators. Awareness of performance data can assist an organization in determining if a problem exists with a concentrator, and the severity of the problem. The organization can then determine the best course of action including contacting the patient, scheduling a service call, or dispatching a service technician for urgent situations.

Patient Review

When a user logs into the SmartLinkO2 website, the patient list is displayed as the default view. At the bottom of the page, the user can select the number of patients shown on each page. Display options include 10, 20, and 30. If more patients are saved to the system than will fit onto the page, the option to move to the next, previous, first page, and last page are available. The user can sort a page by clicking on the column headings at the top of a page.

1. The user can scroll through the list of patients to find the specific patient desired.
2. The patient list can be sorted in ascending/descending order by clicking the label at the top of the list (i.e., Last Name). Clicking the list will sort the list in ascending order (i.e., A-Z). Clicking the list a second time will resort the list in descending order (i.e., Z-A)
3. Alternatively, the user can enter search criteria (i.e., patient's last name) into the search option located at the top-right area of the patient list.
   Show example of search.
4. When the desired patient is found, select the down arrow on the far-right side of the screen.
5. The system will display a list of options including; view, edit, delete, devices, notes, accessories, and reset password.
6. Selecting any of these options will bring the user to a page consisting of the selected data and information for that specific patient. On the far left of the screen is a sidebar allowing the user to switch between the view, edit patient, devices, notes, accessories, and documents tabs in the more detailed view.
   Show example of this action
7. Beneath this side bar is an abbreviated list of performance data corresponding to the device registered to that patient that was used last.

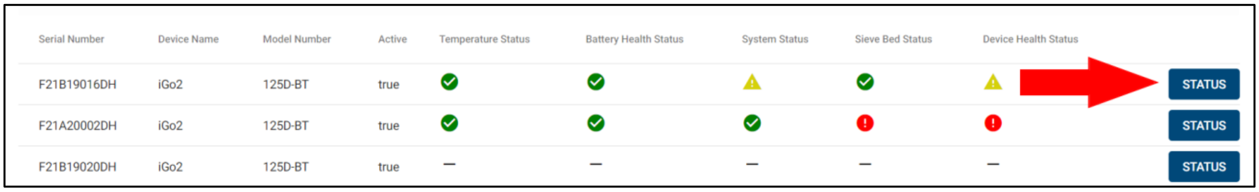


Device Review

To monitor performance data on a device associated with the patient, follow the steps below. **NOTE**: At the bottom of the page, the user can select the number of devices shown on each page. Display options include: 10, 20, and 30. If more devices are saved to the system than will fit onto the page, the option to move to the next, previous, first page, and last page are available. The user can sort a page by clicking on the column headings at the top of a page.

1. The user can scroll through the list of devices to find the specific device desired.
2. The device list can be sorted in ascending/descending order by clicking the label at the top of the list (i.e., Serial Number). Clicking the list will sort the list in ascending order (i.e., A-Z). Clicking the list a second time will resort the list in descending order (i.e., Z-A)

3. Alternatively, the user can enter search criteria (i.e., patient's last name) using the PATIENT list and use the search option located at the top-right area of the patient list.
4. When the desired device is found, select the STATUS option displayed on the far-right side of the screen.



Serial Number	Device Name	Model Number	Active	Temperature Status	Battery Health Status	System Status	Sieve Bed Status	Device Health Status	
F21B19016DH	iGo2	125D-BT	true						STATUS
F21A20002DH	iGo2	125D-BT	true						STATUS
F21B19020DH	iGo2	125D-BT	true	–	–	–	–	–	STATUS

5. The system will display the detailed performance data for the selected device.
6. At the top of the details performance data screen, the system will display the date and time of the last update for the selected device, along with its serial number.
   Show an example of this date/time stamp and serial number.
7. Scroll down to view the hour meter, battery status, device health, settings, breath rate, device information, and alert list for the device selected. **NOTE**: The abbreviated list of performance data shown on the patient detail screen is NOT displayed when using the status option from the device list.

Alert Meanings

When viewing performance data of a device from either the patient list or the device list, the system will show the device's status to assist with monitoring key performance data. The key performance data includes the hour meter, battery details, device health, settings, breath rate, and device information.

Color-coded icons will appear as follows:

- Green circle with a white checkmark indicates the device is functioning properly for the item indicated. No action is needed.
- Yellow triangle with a white exclamation point indicates the function may be degrading. Review of the device remotely, or possible retrieval of the unit from the patient for evaluation is recommended at the next convenient time.
- Red circle with a white exclamation point indicates a failure for the specific health of that item (i.e., sieve beds). An exchange of the unit should be done immediately, and the unit returned for evaluation and repair as necessary.

NOTE: A temperature status of RED may be handled with a phone call to the patient first to see if the patient was using or recently retrieved the unit from an extremely hot environment or has restricted the airflow in/around the unit (i.e., placed the unit inside a handbag or other carrying bag without proper ventilation or stored the unit inside a car). An overheated situation can often be corrected by allowing the unit to cool off to the correct operating temperature range of the POC before resuming operation of the concentrator.