



User Guide

**for
AllMed Clients**

**Version 1.0
January 2009**



PeerPoint Workflow

User Guide for AllMed Clients

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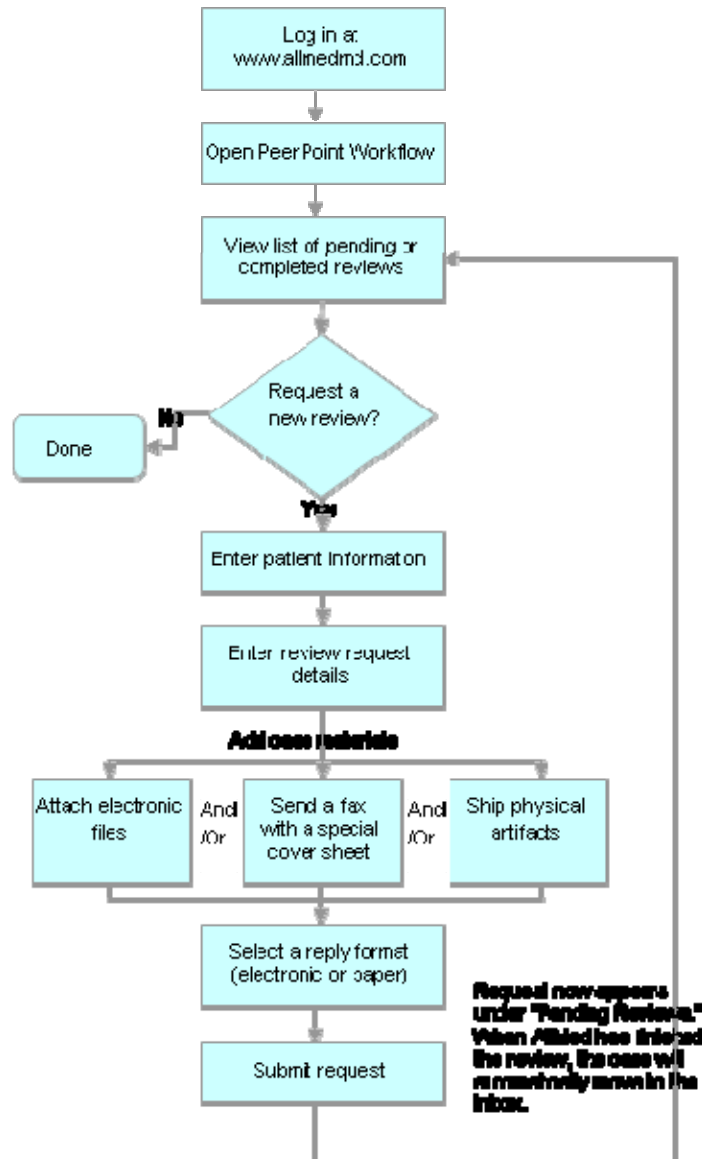
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Overview

PeerPoint® Workflow provides an easy-to-use method for submitting case review requests using a secure web site. This integrated workflow software helps expedite communication and reduces dependence on paper faxes for case materials. All communication between you and AllMed is kept confidential and password protected.



Using PeerPoint Workflow, you can read old reviews, get status updates on pending reviews, and request new reviews. Simply log in to see your company's PeerPoint page.

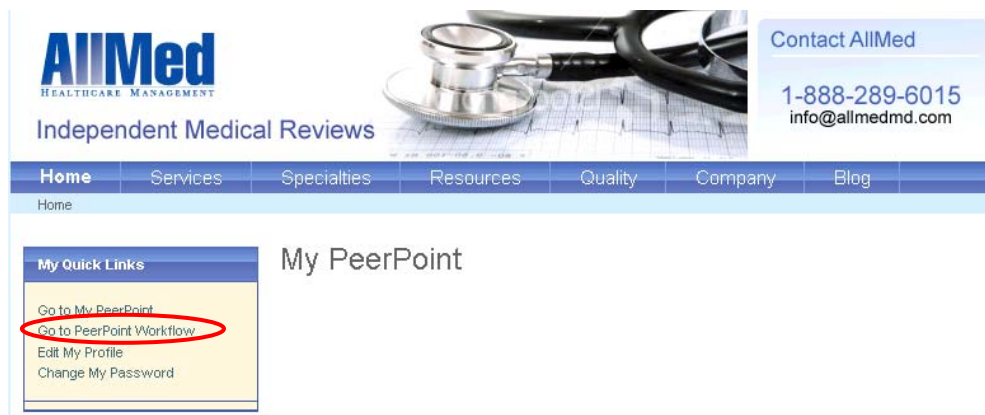
Opening PeerPoint Workflow

To open the PeerPoint Workflow application:

1. Go to www.allmedmd.com.
2. Log in to My PeerPoint using the PeerPoint login name and password that AllMed provided to you.



3. Choose **Go to PeerPoint Workflow** from the **My Quick Links** menu.



The PeerPoint Workflow application opens, displaying the Dashboard.

Note

Choose **Edit My Profile** from the **My Quick Links** menu to edit/update your user account information, such as name, address, and e-mail address. For more information, see “Managing Your Profile” on page 20.

Choose **Change My Password** from the **My Quick Links** menu to change your PeerPoint password. For more information, see “Changing Your Password” on page 9.

Using the Dashboard

The Dashboard displays all the reviews that you have submitted to AllMed, including any newly completed reviews, reviews already in progress, and archives of past reviews.



For Internet Explorer Users

For proper display of PeerPoint in Internet Explorer, you must change the following settings.

If you have Internet Explorer version 6 or older:

1. From the **Tools** menu, choose **Internet Options**.
2. Under **Temporary Internet Files**, click **Settings**.
3. Under **Check for newer versions of stored pages**, choose **Every visit to the page**.
4. Click **OK** to close the Settings window, and then click **OK** to close the Internet Options window.

If you have Internet Explorer version 7:

1. From the **Tools** menu, choose **Internet Options**.
2. Under **Browsing history**, click **Settings**.
3. Under **Temporary Internet Files/Check for newer versions of stored pages**, choose **Every time I visit the webpage**.
4. Click **OK** to close the Temporary Internet Files and History Settings window, and then click **OK** to close the Internet Options window.

The Dashboard is divided into four sections:


Tip

For easier viewing, you can expand or collapse each section by clicking the **Show/Hide** button located to the right of the section.



Alerts

The Alerts section displays messages that are automatically generated by PeerPoint whenever AllMed staff makes a change to a review request. For example, in the Alerts section shown below, an alert indicates that the reviewer specialization has been changed. **AllMed will always contact you by phone prior to changing any aspect of your review request.**

Alerts							Hide
New Alert	Case	Date	Time	User	Action/Outcome/Notes		
	2008-332	12/04/2008	12:23	Test Admin	The value for Specialization has been changed to Acupuncture	Mark as read	

Click the **Case** link to open details of the case.

Click the **Mark as read** link to acknowledge that you have viewed the alert. The alert is then automatically deleted.

Inbox

The Inbox displays the cases for which AllMed has recently completed a review. The case status for each case is “Completed.”

Inbox							Hide
Case Code	Contact	Patient Name	Date In	Due by	Priority	Case Status	
2008-347	Test Client	Chris Test	12/09 09:13	N/A	Standard: 3 to 7 days	Completed	

Click a column header to sort the cases. For example, click **Patient Name** to sort the list by patient.

All completed case reviews are automatically moved to the Archives list after 30 days; however, you can manually archive a completed case at any time. See “Archiving Cases” on page 8.

Pending Reviews

The Pending Reviews section displays all cases that you have submitted to AllMed for review. It also displays any cases for which you have created a review request, but have not yet submitted the request to AllMed (Pre-Submitted cases).

The **Case Status** column indicates the progress of each review. Status types are defined in the following table.

Status	Description
Pre-Submitted	The review request was created, but has not been submitted to AllMed.
New: Unopened	The review request has been submitted to AllMed, but has not been acted on by AllMed staff. You can still edit the submission while it is in this status.
New	The review request has been received by AllMed and is being processed.
Assigned Peer	AllMed has sent the case to a peer for review.
Back From Peer	The peer reviewer has reviewed the case and sent the determination to AllMed for processing.
Peer Rejected	The peer the case was assigned to was unable to review the case. AllMed will re-assign the case to a different peer reviewer.
Ready for Processing	AllMed's clinical staff has reviewed the peer reviewer's determination and has sent the file to AllMed's operations staff for document creation and editing.
MD Approval	The review documents have been created and returned to AllMed's Medical Director for a final review of clinical findings.
Quality Assurance	The final review document has been approved by the Medical Director. A final quality assurance check will be completed prior to the case being sent back to the submitter.
Completed	The review has been completed by AllMed and returned to the submitter.
Archived	The review has been archived.

Archives

The Archives section displays all case reviews that have been completed by AllMed, and that have been automatically or manually archived.

All completed case reviews are automatically archived after 30 days; however, you can manually archive a completed case at any time. For more information on manually archiving cases, see "Archiving Cases" on page 8. Cases remain archived for one year, and are then deleted by AllMed.

Searching for Cases

You can use the Search Cases page to search for one or more cases that meet specified criteria. You can only search for cases that you submitted to AllMed. You cannot search for cases submitted by other PeerPoint users.

To open the Search Cases page, click **Search Cases** at the top of the Dashboard.



[User Guide](#)

[Contact Us](#)

[Logout](#)



To search for cases:

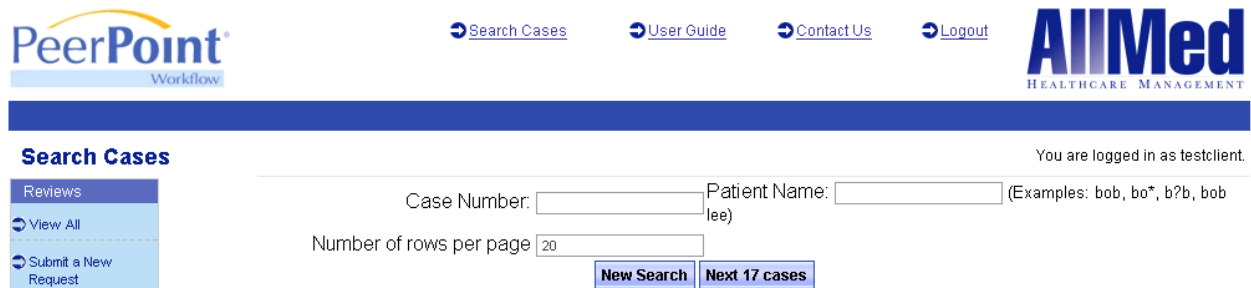
1. (optional) Type a case number in the **Case Number** field.
You can search for the first four digits of the case number (which designate the year submitted), the last three digits of the case number, or the full case number.
2. (optional) Type the full or partial patient name in the **Patient Name** field.
This field is not case sensitive; however, you must enter the name as it was originally entered in the review request (for example, Bob vs. Robert).
3. (optional) Change the default value in the **Number of rows per page** field.
4. Click **New Search**.

All cases that meet the specified criteria are displayed.

Note

When you initially open the Search Cases page, it displays all cases that you have submitted. To return to this list after you have searched for specific cases, delete entries from the **Case Number** and **Patient Name** fields (so that the fields are blank), and then click **New Search**.

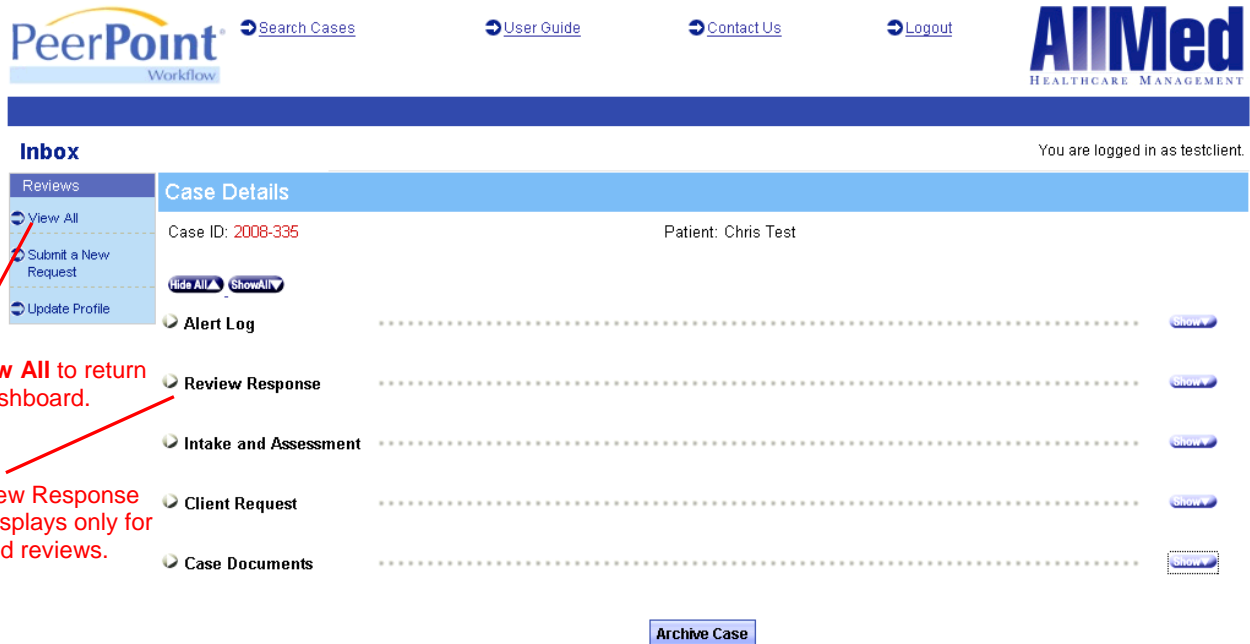
Cases that were archived for a year and then automatically deleted cannot be located during a search.



Click **View All** on the **Reviews** menu (on the left side of the page) to return to the Dashboard.

Viewing Case Details

To view more information about a case listed on the Dashboard, click the case number to open the Case Details page.



PeerPoint [Search Cases](#) [User Guide](#) [Contact Us](#) [Logout](#) **AllMed**
HEALTHCARE MANAGEMENT

Inbox You are logged in as testclient.

Case Details
Case ID: 2008-335 Patient: Chris Test
Hide All Show All

- Alert Log [Show](#)
- Review Response [Show](#)
- Intake and Assessment [Show](#)
- Client Request [Show](#)
- Case Documents [Show](#)

[Archive Case](#)

Click **View All** to return to the Dashboard.

The **Review Response** section displays only for Completed reviews.

The **Archive Case** button displays only for Completed reviews. For cases in Pre-Submitted status, a **Submit Case** button displays.

For most cases, the Case Details page is read only, and displays information that was included in the original review request.

For pending cases in Pre-Submitted status (cases for which a review request was created but not submitted to AllMed), you can make changes to the fields in the request and attach documents. If you wish to submit the case for review at this time, click **Submit Case** at the bottom of the page. For more information, see “Creating a Pre-Submitted Case” on page 16.

For completed cases, you can view the reviewer’s determination and archive the case. For more information, see “Viewing a Completed Review” on page 18 and “Archiving Cases” on page 8.

Archiving Cases

All completed case reviews are automatically moved from your Inbox to the Archives list after 30 days; however, you can manually archive a completed case at any time.

To archive a completed case:

1. In your Inbox, click the case number of the case you wish to archive.
The Case Details page opens.
2. Click **Archive Case** at the bottom of the Case Details page.

Archived cases are deleted by AllMed after one year.

For more information on viewing completed reviews, see “Viewing a Completed Review” on page 18.

Updating Your Profile

You can update your PeerPoint profile information (e-mail address, phone number, etc.) using the Edit Profile page.

For more information on updating your profile, see “Managing Your Profile” on page 20.

Viewing the Online User Guide

To view an online copy (PDF) of this user guide, click **User Guide** at the top of the Dashboard.



Contacting AllMed

If you need to contact AllMed, click **Contact Us** at the top of the Dashboard.



A web page opens, from which you can complete a query form to submit a question to AllMed. The web page also provides AllMed’s address, phone number, and fax number.

Logging Out

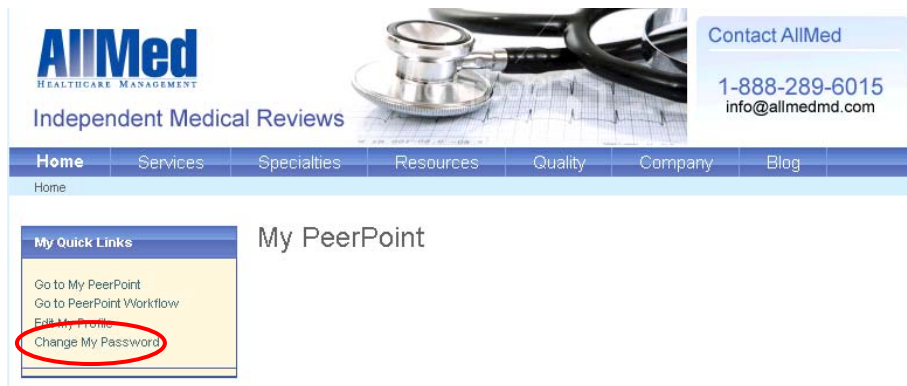
To log out of PeerPoint Workflow, click **Logout** at the top of the Dashboard.



Changing Your Password

To change your PeerPoint password:

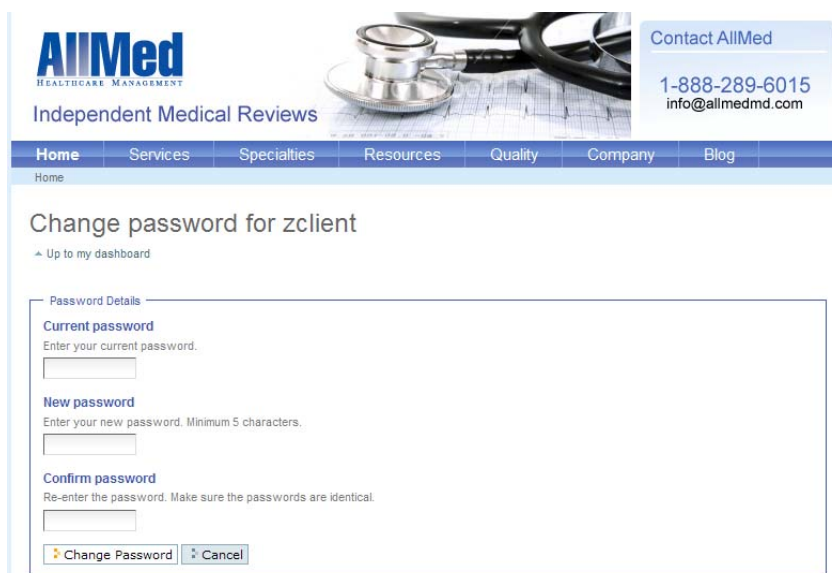
1. On the My PeerPoint home page, choose **Change My Password** from the **My Quick Links** menu.



Note

To access My PeerPoint, go to www.allmedmd.com and log in using your PeerPoint user ID and password.

2. Type your current password in the **Current password** field.
3. Type the new password in the **New password** field.
4. Type the new password again in the **Confirm password** field.
5. Click **Change Password**.

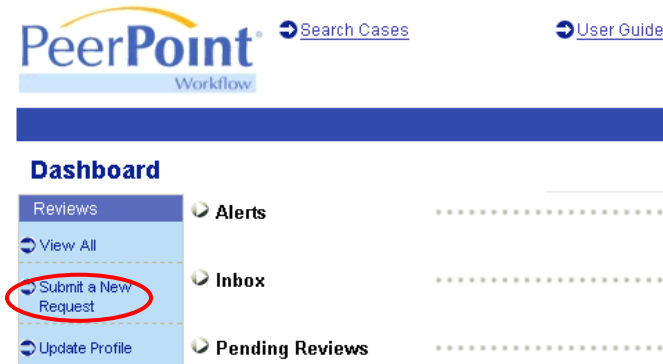


The screenshot shows the 'Change password for zclient' form on the AllMed website. The form has three input fields: 'Current password', 'New password', and 'Confirm password'. Below the input fields are 'Change Password' and 'Cancel' buttons.

Requesting a Review

PeerPoint Workflow provides a New Review Request wizard that walks you through the steps required to submit a case review request to AllMed.

To begin the review request process, choose **Submit a New Request** from the **Reviews** menu.



The first page of the New Review Request wizard is displayed.

Step 1: Enter Patient Information

To enter patient information:

1. Choose your name from the **Contact** dropdown list.
2. Type the patient's name in the **Patient Name** field.
3. Type the patient's ID number in the **Patient ID** field.
4. (optional) Type the insured's name in the **Insured Name** field.
Leave this field blank if the insured is the patient.
5. (optional) Type the insured's ID number in the **Insured ID** field.
6. Type the group ID in the **Group ID** field.
7. Click **Next**.

Step 1: Enter Patient Information

Required fields are marked (*)

* Contact	<input type="text" value="Dee Eks"/>	Insured Name	<input type="text"/>
* Patient Name	<input type="text" value="Deloris Anderson"/>	Insured ID	<input type="text"/>
* Patient ID	<input type="text" value="485934"/>	* Group ID	<input type="text" value="8345"/>
<input type="button" value="Next -->"/>			

Step 2: Complete the Request Form

To complete the request form:

Note

Only those fields marked with an asterisk (*) are required. Default values are provided for optional fields.

1. In the **Time Request** field, choose **Standard** (3 to 7 days) or **Expedited** (no longer than 72 hours) from the dropdown list.
2. Click the calendar icon to choose a **Need Review by** date.
3. In the **Time** field, choose the time of day (in your time zone) by which you need the review completed.
4. In the **Contact Phone** field, choose the phone number at which you prefer to be contacted.
5. In the **Contact Email** field, choose the e-mail address at which you prefer to be contacted.
6. In the **Contact Fax** field, choose your preferred fax number.

Note

The default value and available options for contact phone, e-mail, and fax are derived from your client profile. For more information on updating your profile, see “Managing Your Profile” on page 20.

Step 2. Complete the Request Form

Required fields are marked (*)

Use only the buttons below to change screens. Do not use the back button in your browser's toolbar.

Patient Name: Deloris Anderson	Patient ID: 485934
Insured Name :	Group ID: 8345
.....	
Contact: Dee Eks	Company: tripple eks co
Time Request: Standard: 3 to 7 days	Contact Phone: 555.373.5555 x242 (Phone)
Need Review by: 12/31/2008	Contact Email: deks@comp.net (E-Mail)
Time: 5:00 PM	Contact Fax: (no value)
.....	

7. Under **Review Request**, choose **In-House Physician** or **Peer Specialist**.

In-house physicians are AllMed employees. AllMed has in-house physicians specializing in internal medicine and emergency medicine. If you are requesting an expedited review in one of these specialty areas, the review can be completed more quickly if performed by an in-house physician.

Peer Specialists are specialty physicians contracted by AllMed to conduct medical record reviews.

8. Under **Review Stage**, choose **Pre-service** if treatment has not yet taken place, or **Post-service** if treatment has already been completed.

9. Under **Determination Level**, choose the appropriate level of determination. If you choose **Other**, you will be prompted to enter more detail.

10. Choose a medical specialty from the **Specialty** dropdown list.

If you choose **Peer Specialist** and then choose **Internal Medicine** or **Emergency Medicine**, AllMed clinical staff may contact you if they think the case should be reviewed by an in-house physician. If you agree to the change, you will receive an Alert that your review request has been modified by AllMed.

11. Choose a procedure or treatment area from the **Procedure/Treatment Area** dropdown list. If you choose **Other**, you will be prompted to enter more detail.

12. Choose the type of review from the **Review Type** dropdown list.

If you choose **Pre-Existing Condition**, you will be prompted to enter the effective date of the insured's policy. If you choose **Other**, you will be prompted to enter more detail.

13. Type a policy number in the **Medical Policy Number** field, if you've been instructed by your manager to do so for reporting purposes.

AllMed can use this information to generate a report that indicates, for example, the percentage of denials overturned by AllMed for a particular medical policy number.

14. Under **Medical Review Standards/Definitions to base review on**, choose from the list of options. The options available will vary, depending on the Review Type selected.

<p>*Review Request</p> <p><input type="radio"/> In-House Physician</p> <p><input checked="" type="radio"/> Peer Specialist</p>	<p>*Review Stage</p> <p><input checked="" type="radio"/> Pre-service</p> <p><input type="radio"/> Post-service</p>	<p>*Determination Level</p> <p><input checked="" type="radio"/> Initial Determination</p> <p><input type="radio"/> 1st Level Appeal</p> <p><input type="radio"/> 2nd Level Appeal</p> <p><input type="radio"/> Other</p>
<p>*Specialty:</p> <p>Cardiology</p>	<p>Procedure / Treatment Area:</p> <p>CT Angiogram</p>	<p>*Review Type</p> <p>Medical Necessity</p>

Medical Policy Number (if applicable):

Medical Review Standards / Definitions to base review on:

Plan Language (Please upload this on the next screen)

Medical Policy

[AllMed Standards/Definitions](#)

15. Under **Questions for Review**, click **Add a Question**.

A question field will be displayed. Type your question into the field.

To add another question, click **Add a Question** again.

Tip

For the fastest response, type each question into a separate question field.

16. Under **Other background or medical information the reviewer might find useful**, type any applicable information into the text box.

To paste information from a Word document, click .

You will have the opportunity to upload supporting electronic documents in a later step.

***Questions for Review:** (Please be specific. For fastest service, enter each question separately. Do not type all UPPERCASE.)

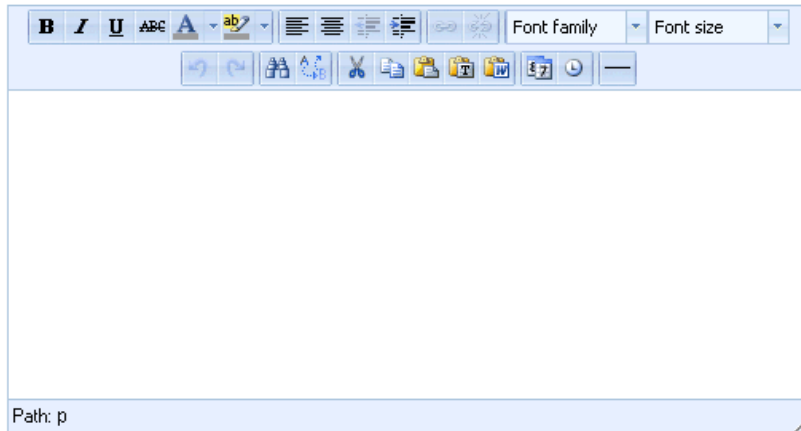
1.

Add a Question

Other background or medical information the reviewer might find useful:

Anything longer than a paragraph or two, please attach a document.

If pasting from Word use the "W" button ("paste from Word") below.



Path: p

17. Under **Accompanying Documents**, click the appropriate check box(es) to indicate whether you have electronic documents to upload, physical artifacts or documents to send by courier, and/or paper documents to be faxed.

18. Click **Next**.

.....
Accompanying Documents:

- I have electronic documents to upload with this request (step 3).
- I have physical artifacts or documents that I wish to send by courier for this request (step 4).
- I have paper documents that I wish to fax along with this request.

Step 3: Attach Electronic Documents

If you indicated on the review request form that you have electronic documents to upload with the request, then you will see Step 3 of the New Review Request wizard. If you did not indicate that you have electronic documents to upload, then you will not see this step.

To attach electronic documents to your review request:

1. Click **Browse...** to select the document that you wish to upload.
2. (optional) Under **Document Description**, type a description of the uploaded document.
3. Click **Attach Document**.
4. Repeat this process to attach one or more additional documents.
5. If you indicated on the review request form that you wish to have the review based on plan language or a medical policy, upload the plan or policy now.
 - 1) Click **Browse...** to select the document that you wish to upload.
 - 2) Click **Attach this file as (Plan Language)**.
6. Click **Next**.

Step 3: Attach Electronic Documents

1. Select File with <u>Browse</u> button <input style="width: 100%;" type="text"/> <input type="button" value="Browse..."/>	2. Document Description (Optional) <input style="width: 100%;" type="text"/>	3. Click to <u>Attach</u> the selected file <input type="button" value="Attach Document"/>
---	--	--

Medical Review Standards / Definitions to base review on:

Plan Language (Please upload this)

Step 4: Prepare Physical Artifacts to Send to AllMed

If you indicated on the review request form that you have physical artifacts or documents to be sent by courier, then you will see Step 4 of the New Review Request wizard. If you did not indicate that you have artifacts to send, then you will not see this step.

To indicate that you have physical artifacts to send in support of your review request:

1. Choose the type of artifact from the **Document Type** dropdown list.
2. (optional) Type a description of the artifact in the **Document Description** field.
3. Type the quantity of the artifact in the **Qty.** field.
4. Choose a shipping method from the **Shipping Method** dropdown list.
5. Type the number of shipping envelopes/boxes in the **Number of Shipping Containers** field.
6. Click **Add**.
7. To add another artifact, press **F5** on your keyboard to refresh your browser.
A second entry line displays. Repeat steps 1 through 6.
8. Click **Next**.

Step 4: Prepare Physical Artifacts to send to AllMed

Document Type	Document Description	Qty.	Shipping Method	Number of Shipping Containers	Created Date
(no value) ▼			(no value) ▼		Add

AllMed's Shipping Address:

AllMed HealthCare Management
621 SW Alder St, Suite 740
Portland, OR 97205

Phone number: 800.400.9916

Step 5: Select Delivery Method for Completed Review

You can select the method by which AllMed will deliver your completed review.

To select a delivery method:

1. Choose a delivery method from the options listed.
2. Choose the address to which the review should be sent.

The default value and available options for address, e-mail, and fax are derived from your client profile. For more information, see “Managing Your Profile” on page 20.

3. Click **Next**.

Step 5: Delivery Method for Completed Review

- Email notification
- Fax
- First class mail
- Overnight

Send Via Email notification To:

deks@comp.net (E-Mail) ▼

Note: This information is from your user profile. If you need to update your profile details click on the "Update Profile" link on the left navigation bar.

[<-- Back](#) [Next -->](#)

Step 6: Review and Submit Your Request

A copy of the information from your request is presented for your review prior to submitting the request to AllMed.

Look over the information carefully. If you need to make changes, click **Back** to return to previous steps in the New Review Request wizard. If you go back to previous steps in the wizard, be sure to return to the final step so that you can submit your request.

Creating a Pre-Submitted Case

If you do not wish to submit your review request to AllMed at this time, choose **View All** from the **Reviews** menu (on the left side of the page) to leave the New Request Wizard and return to the Dashboard.

The information in the request will automatically be saved, and the case will be listed under Pending Reviews with a status of “Pre-Submitted.”

Because AllMed will not know whether you intentionally or accidentally failed to submit the request, AllMed will contact you if the case stays in Pre-Submitted status for four hours or longer.

If you decide not to submit a Pre-Submitted case for review, contact AllMed and ask to have the case deleted. Only AllMed can delete a Pre-Submitted case from the Pending Reviews list.

Submitting your Request to AllMed

To submit a review request:

1. If you indicated on the review request form that you have paper documents that you wish to fax, click **Print this page** to print a fax cover sheet.

This button will not be available after you submit the request, so be sure to print the page before continuing to the next step.

2. Click **SUBMIT REQUEST** to submit your review request to AllMed.

Final Step: Review your request before sending.

Case No. **2008-375**

[Print this page](#)

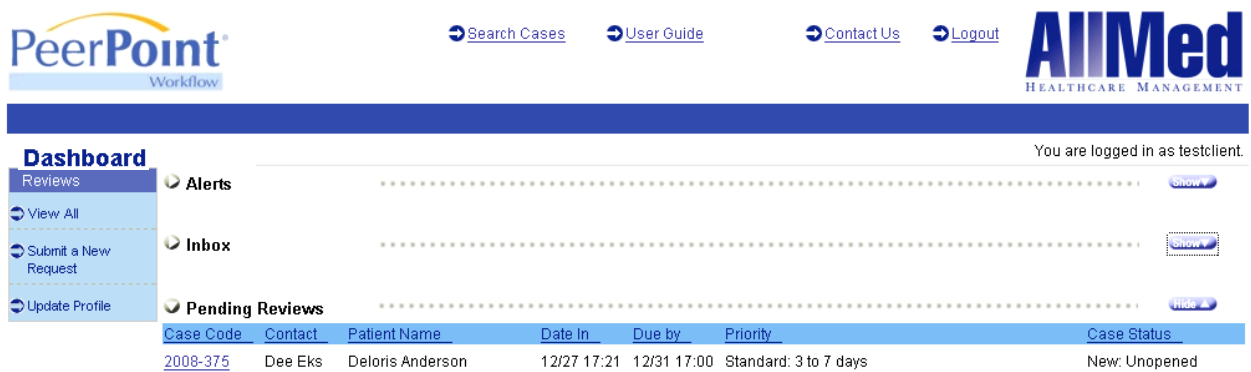
[SUBMIT REQUEST](#)

Print this page as the FAX cover sheet.

Patient Name: Deloris Anderson **Insured Name:**
Patient ID: 485934 **Group ID:** 8345



After you submit your request, the case appears in the Pending Reviews list on the Dashboard, with a status of “New: Unopened.” When AllMed staff opens your submitted case and begins processing it, you will receive an e-mail notification telling you the case was received.



The screenshot shows the AllMed dashboard interface. At the top, there are navigation links for Search Cases, User Guide, Contact Us, and Logout. The PeerPoint Workflow logo is on the left, and the AllMed Healthcare Management logo is on the right. A notification at the top right states "You are logged in as testclient." The main dashboard area is divided into sections: Alerts, Inbox, and Pending Reviews. The Pending Reviews section is expanded, showing a table with the following data:

Case Code	Contact	Patient Name	Date In	Due by	Priority	Case Status
2008-375	Dee Eks	Deloris Anderson	12/27 17:21	12/31 17:00	Standard: 3 to 7 days	New: Unopened

Tracking Progress

Once you submit a request, you can track its progress through the review process. In the Pending Reviews section on the Dashboard, the **Case Status** column indicates where in the process the case currently resides. The status of each case is updated automatically as it is processed by AllMed.

The screenshot shows the AllMed Dashboard with the following elements:

- PeerPoint Workflow logo on the top left.
- Navigation links: Search Cases, User Guide, Contact Us, Logout.
- AllMed Healthcare Management logo on the top right.
- Dashboard header: "You are logged in as testclient."
- Left sidebar: Reviews, View All, Submit a New Request, Update Profile.
- Main content area: Alerts, Inbox, Pending Reviews.
- Pending Reviews table:

Case Code	Contact	Patient Name	Date In	Due by	Priority	Case Status
2008-375	Dee Eks	Deloris Anderson	12/27 17:21	12/31 17:00	Standard: 3 to 7 days	New: Unopened

Click the **Case Code** link to open details of the case.

To view details about a case, click the case number to open the Case Details page. For more information on the Case Details page, see “Viewing Case Details” on page 7.

Viewing a Completed Review

When a review has been completed by AllMed, the case will be added to your Inbox with a status of “Completed.”

You will also receive an e-mail from AllMed, indicating that the review is complete.

Note

The notification e-mail will be sent to the primary e-mail address indicated in your client profile. For information on changing your e-mail address, see “Managing Your Profile” on page 20.

To view the review response:

1. Click the case number to open the Case Details page.
2. Under **Review Response**, view the final determination.
3. Click the document link(s) to view the documentation provided by the reviewer.

Depending on your company’s agreement with AllMed, you may also see a link to the invoice.

Inbox

You are logged in as testclient.

Reviews

[View All](#)[Submit a New Request](#)[Update Profile](#)

Case Details

Case ID: 2008-335

Patient: Chris Test

[Hide All](#) [Show All](#)[Alert Log](#)[Show](#)[Review Response](#)

Final Determination: Upheld

[Hide](#)

Documents Included in this review (each open in separate windows):

- [Independent Medical Review](#)
- [View Final Invoice](#)

[Intake and Assessment](#)[Show](#)[Client Request](#)[Show](#)[Case Documents](#)[Show](#)[Archive Case](#)

End User License Agreement

Click **View All** to return to the Dashboard.

These sections display information you entered in the original review request.

The status of any physical artifacts will be indicated in the Case Documents section. If you requested that an artifact be returned to you, the status will read “Shipped from AllMed” when it is on its way.

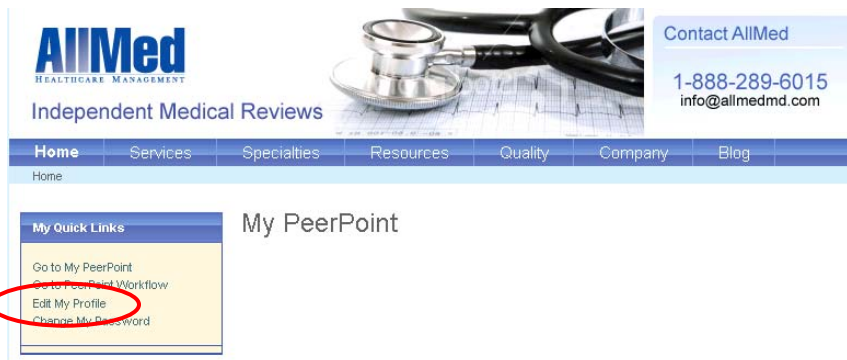
All completed case reviews are automatically archived after 30 days; however, you can manually archive the completed case by clicking **Archive Case** at the bottom of the Case Details page. The case is moved to the Archives list on the Dashboard.

Managing Your Profile

You can update the profile information (e-mail addresses, phone numbers, etc.) maintained for you in My PeerPoint, using the Edit Profile page.

There are two ways to open the Edit Profile page:

- On the My PeerPoint home page, choose **Edit My Profile** from the **My Quick Links** menu.



Note

To access My PeerPoint, go to www.allmedmd.com and log in using your PeerPoint user ID and password.

- In PeerPoint Workflow, choose **Update Profile** from the **Reviews** menu.



The Edit Profile page consists of five sections:

Account Information for user

1. To change your name or primary e-mail address, type an entry into the corresponding field.
2. If multiple phone numbers, fax numbers, e-mail addresses, and/or street addresses have been set up for you, choose the numbers/addresses that you would like to use as your default contact information from the dropdown lists.

You cannot type entries into these fields; you can only select from pre-defined entries. To add or change numbers/addresses, use the Contact Details fields.



Caution

The **Password** and **Confirm password** fields on the Edit Profile page are currently non-functional. Do not use these fields to change your password. For more information on changing your password, see “Changing Your Password” on page 9.

Primary Contact Details

Use the fields in this section to add or change your primary contact information. This information should reflect the address, phone number, and fax number at which AllMed can most readily reach you.

Once you have defined your primary contact details, you can choose them as your default contact information from the dropdown lists located under **Account Information for user**.

Edit Profile

Instructions: Edit your profile in the boxes below. Click the Save button at the bottom when complete.

Account Information for user: zclient

<p>Password Minimum 5 characters <input type="text"/></p> <p>Full Name Used for AllMed Correspondence ONLY ■ Name used for AllMed correspondence <input type="text" value="Debra Day"/></p> <p>Your Default Phone Number <input type="text" value="Phone()"/></p> <p>Your Default Email <input type="text" value="E-Mail()"/></p>	<p>Confirm password Re-enter identical password <input type="text"/></p> <p>E-mail ■ Address to email lost password and for primary correspondence <input type="text" value="day@nowhere.com"/></p> <p>Your Default Fax Number <input type="text" value="Fax(8008008008)"/></p> <p>Your Default Address <input type="text" value="Primary()"/></p>
---	---

Primary Contact Details

<p>Address Line 1 <input type="text" value="PO Box 1009"/></p> <p>City <input type="text" value="Smithtown"/></p> <p>Postal Code Please enter a zip code of 5 or 9 positions <input type="text" value="98765"/></p> <p>Phone ■ <input type="text" value="555-555-5555"/></p>	<p>Address Line 2 <input type="text"/></p> <p>State <input type="text" value="WA"/></p> <p>Country Enter your country <input type="text" value="USA"/></p> <p>Fax ■ <input type="text" value="800-800-8008"/></p>
--	---

Professional Details

Use this section to enter optional biographical information for PeerPoint Network, special contact instructions for AllMed, and a short name for your location.

Secondary Contact Details

Use the fields in this section to add or change your secondary contact information, if applicable.

Once you have defined your secondary contact details, you can choose them as your default contact information from the dropdown lists located under **Account Information for user**.

Other Contact Details

Use the fields in this section to provide alternative contact information, if applicable.

Once you have defined your other contact details, you can choose them as your default contact information from the dropdown lists located under **Account Information for user**.

Professional Details

<p>Biography Biography to appear on PeerPoint Network portal.</p> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>	<p>Requirements Enter special instructions for AllMed</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> <p>If I am not available, please contact John Jones at 555-444-4444.</p> </div>
<p>Location Short location name - perhaps even a helpful office name</p> <div style="border: 1px solid #ccc; padding: 2px;">Acme HQ</div>	

Secondary Contact Details

<p>Address Line 1</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>Address Line 2</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
<p>City</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>State</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
<p>Postal Code <small>Please enter a zip code of 5 or 9 positions</small></p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>Country <small>Enter your country</small></p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
<p>Phone</p> <div style="border: 1px solid #ccc; padding: 2px;">555-222-2222</div>	<p>E-mail</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
<p>Fax</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	

Other Contact Details

<p>Address Line 1</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>Address Line 2</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
<p>City</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>State</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
<p>Postal Code <small>Please enter a zip code of 5 or 9 positions</small></p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>Country <small>Enter your country</small></p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
<p>Phone</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>E-mail</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
<p>Fax</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	

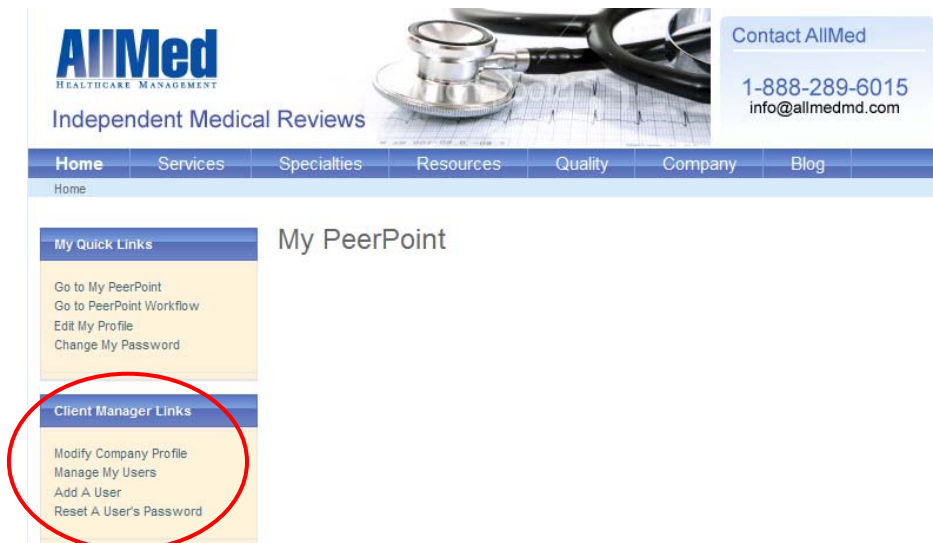
To save your changes, click **Save**. To cancel your changes, click **Cancel**.

Appendix: Client Manager/Administrator Guide

Client managers can perform the following administrative functions within My PeerPoint:

- manage the company profile
- manage user accounts
- add new users
- reset user passwords

All of these functions can be accessed from the **Client Manager Links** menu on the My PeerPoint home page. This menu is visible only to client managers.



Note

To access My PeerPoint, go to www.allmedmd.com and log in using your PeerPoint user ID and password.

Managing Your Company Profile

To set up or modify your company profile:

1. Choose **Modify Company Profile** from the **Client Manager Links** menu.
The Add Company page opens.
2. Type a short name for your company in the **Company Acronym** field.
3. Type the full name of your company in the **Company Name** field.

- Choose the contact numbers/addresses that you would like to use as your default company contact information from the dropdown lists.

You cannot type entries into these fields; you can only select from pre-defined entries. To add or change numbers/addresses, continue to the next step.

- Complete the fields under **Primary Contact Details**.

A red box (■) indicates a required field.

This information will be selected by default in the phone/e-mail/fax/address dropdown lists.

- If you have alternate company contact information, complete the applicable fields under **Secondary Contact Details**.

Once you have defined your company's secondary contact details, you can choose them as the default contact information from the dropdown lists located under **Company Account Information**.

You can enter additional contact options under **Other Contact Details**. This information can also be selected as the defaults in the contact dropdown lists.

- Click **Save**.

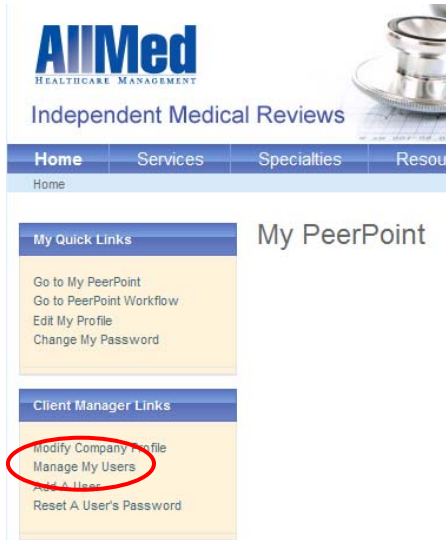
Add Company

An AllMed Client Company

Company Account Information	
<p>Company Acronym ■ Enter a short company acronym, that is a combination of uppercase letters and numbers, beginning with a letter, and that contains no spaces or special characters. This value is also used in the URL to the company folder.</p> <input type="text" value="ACME"/>	
<p>Company Name ■ <input type="text" value="Acme Unlimited, Inc."/></p>	
<p>Company Default Phone Number Enter company's primary phone number.</p> <input type="text" value="Phone()"/>	<p>Company Default Fax Number Enter company's primary fax number.</p> <input type="text" value="Fax()"/>
<p>Company Default Email Address Enter company's primary email address.</p> <input type="text" value="E-Mail()"/>	<p>Company Default Address Enter company's primary address.</p> <input type="text" value="Primary()"/>
Primary Contact Details	
<p>Address Line 1 ■ <input type="text" value="100 North Blvd."/></p>	<p>Address Line 2 <input type="text"/></p>
<p>City ■ <input type="text" value="Big City"/></p>	<p>State ■ <input type="text" value="WA"/></p>
<p>Postal Code ■ Please enter a zip code of 5 or 9 positions <input type="text" value="98765"/></p>	<p>Country Enter your country <input type="text"/></p>
<p>Primary Phone ■ <input type="text" value="555-555-5555"/></p>	<p>Primary E-mail ■ <input type="text" value="general@acme.com"/></p>
<p>Primary Fax ■ <input type="text" value="555-555-5551"/></p>	

Managing User Accounts

To manage the user accounts for your company, choose **Manage My Users** from the **Client Manager Links** menu.



A list of existing user accounts is displayed.

TEST only company

by [jjerry](#) — last modified Nov 25, 2008 07:42 PM

TEST only company

Search

Full Name: Login Name:

This is an 'AND' search (combines criteria). Use the '*' as a wild card character.

-  [yclient2 \(\)](#) — last modified Nov 25, 2008 07:44 PM
-  [yclient \(\)](#) — by — last modified Dec 29, 2008 11:57 AM
-  [testuser03 \(\)](#) — last modified Nov 25, 2008 07:56 PM
-  [zclient \(Bob Zebra \)](#) — by — last modified Dec 31, 2008 10:05 AM
-  [test2049 \(\)](#) — last modified Nov 25, 2008 08:49 PM
-  [test1435 \(\)](#) — last modified Nov 26, 2008 02:36 PM


[Send this](#) — [Print this](#) —

Click **Send this** to send an e-mail that contains a link to this page. Click **Print this** to print this page.

Viewing Account Information

To view read-only information about a user account, search for the account by typing the **Full Name** or **Login Name**, and then click **Search**.

Basic information about the user's account is displayed.

 **TEST only company**

Search

[List All Users](#)

Full Name:

Login Name:

This is an 'AND' search (combines criteria). Use the "*" as a wild card character.

Click **List All Users** to return to the previous page.

Name	Login Name	Creator	Added On	Active
Bob Zebra	zclient		2008-11-25 20:01:26	True

Modifying a User Account

To modify a user account:

1. Click the user account link in the list of user accounts.

TEST only company

by jerry — last modified Nov 25, 2008 07:42 PM

TEST only company

Search

Full Name: Login Name:

This is an 'AND' search (combines criteria). Use the "*" as a wild card character.

[zclient2 \(\)](#) — last modified Nov 25, 2008 07:44 PM
[zclient \(\)](#) — by — last modified Dec 29, 2008 11:57 AM
[testuser03 \(\)](#) — last modified Nov 25, 2008 07:56 PM
[zclient \(Bob Zebra \)](#) — by — last modified Dec 31, 2008 10:05 AM
[test2049 \(\)](#) — last modified Nov 25, 2008 08:49 PM
[test1435 \(\)](#) — last modified Nov 26, 2008 02:36 PM

[Send this](#) — [Print this](#) —

Click the user account that you wish to modify.

The Edit Profile page opens.

2. Edit contact details and/or choose different default values from the contact information dropdown lists.

This is the same page that users go to if they wish to modify their account information. For more information on using this page, see “Managing Your Profile” on page 20.



Caution

The **Password** and **Confirm password** fields on the Edit Profile page are currently non-functional. Do not use these fields to reset a user’s password. For more information on resetting passwords, see “Resetting Passwords” on page 29.

Edit Profile

Instructions: Edit your profile in the boxes below. Click the Save button at the bottom when complete.

Account Information for user: zclient

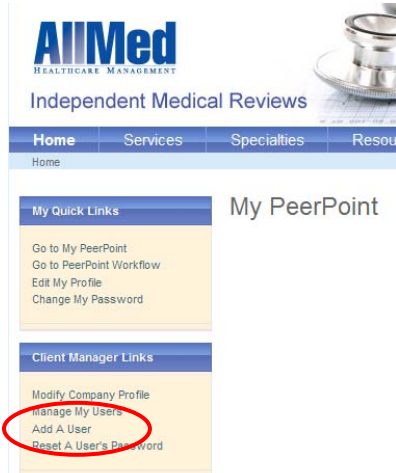
<p>Password Minimum 5 characters <input type="text"/></p> <p>Full Name Used for AllMed Correspondence ONLY ■ Name used for AllMed correspondence <input type="text" value="Bob Zebra"/></p> <p>Your Default Phone Number <input type="text" value="Phone()"/></p> <p>Your Default Email <input type="text" value="E-Mail()"/></p>	<p>Confirm password Re-enter identical password <input type="text"/></p> <p>E-mail ■ Address to email lost password and for primary correspondence <input type="text" value="noone@nowhere.com"/></p> <p>Your Default Fax Number <input type="text" value="Fax(8008008008)"/></p> <p>Your Default Address <input type="text" value="Primary()"/></p>
---	---

Primary Contact Details

Adding a New User

To set up a new user account:

1. Choose **Add A User** from the **Client Manager Links** menu.



The Add Profile page opens.

2. Type a user name in the **User Name** field.
3. Enter contact information and choose default values from the contact information dropdown lists.

This is similar to the page that users go to if they wish to modify their account information. For more information on using this page, see “Managing Your Profile” on page 20.



Caution

The **Password** and **Confirm password** fields on the Add Profile page are currently non-functional. Do not use these fields to reset a user’s password. For more information on resetting passwords, see “Resetting Passwords” on page 29.

Info Client Member has been created.

Add Profile

Instructions: Edit your profile in the boxes below. Click the Save button at the bottom when complete.

Account Information for user: clientmember.2008-12-31.2372095694

<p>User Name *</p> <p>Your User Name is publicly available; use an anonymous name if needed</p> <input type="text"/>	<p>Confirm password</p> <p>Re-enter identical password</p> <input type="text"/>
<p>Password</p> <p>Minimum 5 characters</p> <input type="text"/>	<p>E-mail *</p> <p>Address to email lost password and for primary correspondence</p> <input type="text"/>
<p>Full Name Used for AllMed Correspondence ONLY *</p> <p>Name used for AllMed correspondence</p> <input type="text"/>	<p>Your Default Phone Number</p> <p>Phone()</p> <input type="text"/>
<p>Your Default Email</p> <p>E-Mail()</p> <input type="text"/>	<p>Your Default Fax Number</p> <p>Fax()</p> <input type="text"/>
<p>Your Default Address</p> <p>Primary()</p> <input type="text"/>	

Primary Contact Details

Resetting Passwords

You cannot directly reset a user's password; however, you can initiate the process for the user to obtain a new password from AllMed.

To reset a user's password, choose **Reset A User's Password** from the **Client Manager Links** menu.



The Lost Password page opens.

Type the user's user name in the **Send Reset Password Link for Username** field, and then click **Start password reset**.

AllMed will e-mail a link to the user that will allow the user to create a new password.

Lost Password

For security reasons, we store the password encrypted, and cannot mail it to you. If you would like to reset the password of a user, fill out the form below and we will send that user an email at the address we have on record and that user will then have a unique URL to follow that will prompt for a new password.

Send Reset Password Link for Username:

If this process will not work for the password reset for this user (e.g. he/she forgot the username or his/her email address has changed), contact the [site administrator](#).