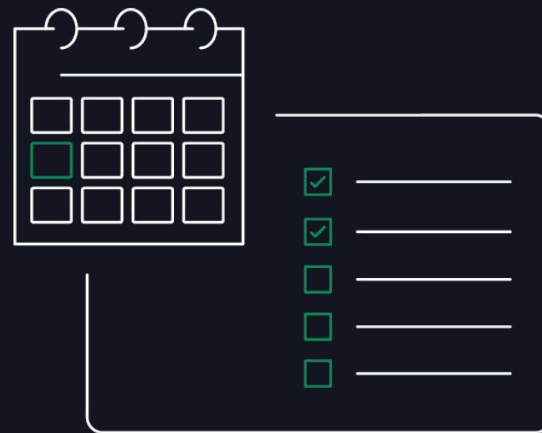


v

Admin

# Agenda

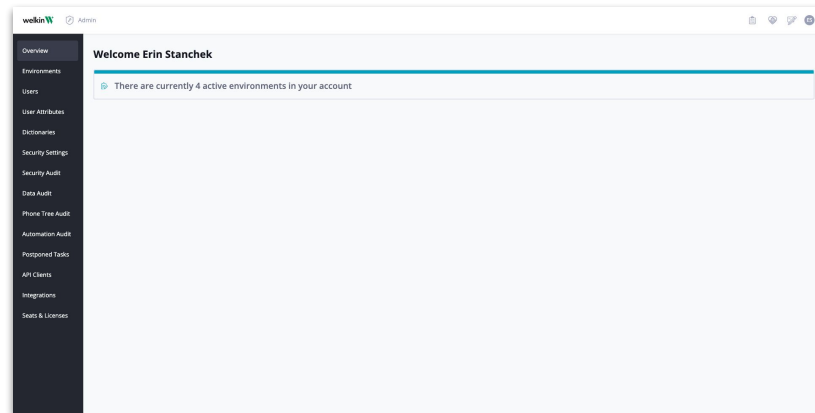
- Overview
- Environments
- Users
- Customer User Attributes
- Dictionaries
- Security Settings
- Security Audit
- Data Audit
- Phone Tree Audit
- Postponed Tasks
- API Clients
- Integrations
- Seats & Licenses



# Welkin Admin

# Overview

Admin is a tool used to configure your Welkin environments. When logging into Admin - you will first see the Overview screen.

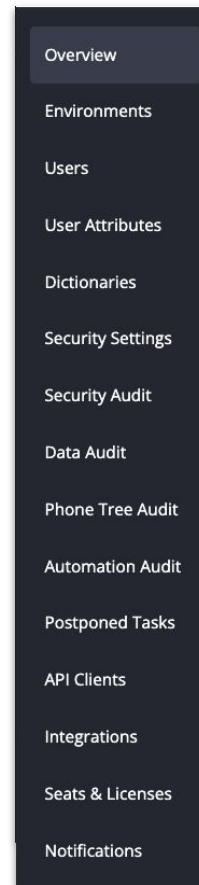


# Overview

The horizontal menu bar on the left will allow you to navigate through all the options within the Admin portal.

The icons at the top right of the screen from left to right:

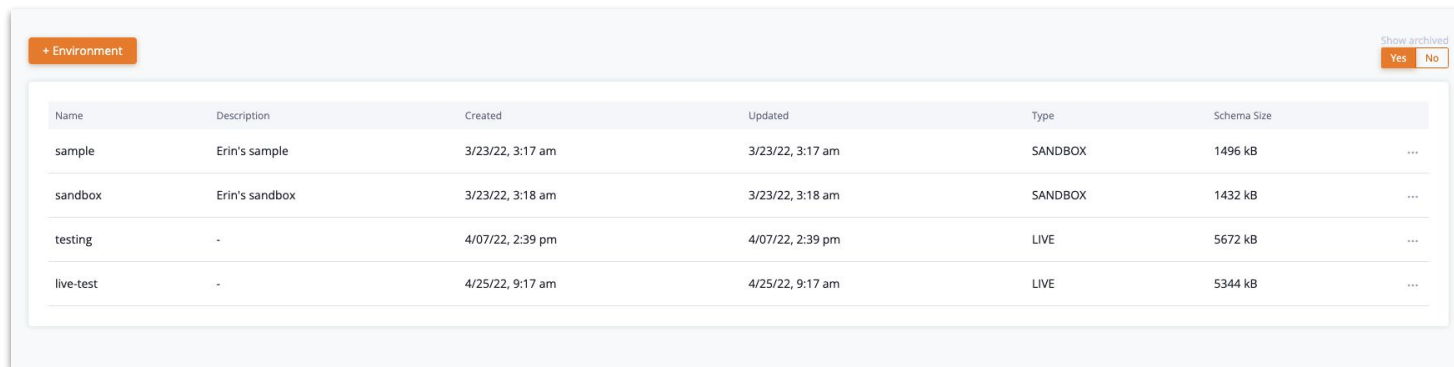
- Release Notes
- Care
- Designer
- Profile of user/Log Out/Current API & UI version



# Environments

The environments tab will show:

- Active environments
  - The toggle on the right will give you the option to show or hide archived environments)
- Description
- Created date and time
- Last updated date and time
- Whether the environment is a sandbox or live
- Schema size



The screenshot shows a user interface for managing environments. At the top left is a button labeled '+ Environment'. At the top right is a 'Show archived' toggle with 'Yes' and 'No' options. Below this is a table with the following columns: Name, Description, Created, Updated, Type, and Schema Size. The table contains four rows of data.

Name	Description	Created	Updated	Type	Schema Size	
sample	Erin's sample	3/23/22, 3:17 am	3/23/22, 3:17 am	SANDBOX	1496 kB	...
sandbox	Erin's sandbox	3/23/22, 3:18 am	3/23/22, 3:18 am	SANDBOX	1432 kB	...
testing	-	4/07/22, 2:39 pm	4/07/22, 2:39 pm	LIVE	5672 kB	...
live-test	-	4/25/22, 9:17 am	4/25/22, 9:17 am	LIVE	5344 kB	...



# Environments

Clicking on the three dots in the right hand column will allow you to

- Navigate to Designer
- Edit the Environment
- Archive the Environment

Name	Description	Created	Updated	Type	Schema Size	
sample	Erin's sample	3/23/22, 3:17 am	3/23/22, 3:17 am	SANDBOX	1496 kB	...
sandbox	Erin's sandbox	3/23/22, 3:18 am	3/23/22, 3:18 am	SANDBOX	1432 kB	Go to Designer Edit Environment Archive Environment
testing	-	4/07/22, 2:39 pm	4/07/22, 2:39 pm	LIVE	5672 kB	



# Environments

To add an environment, click on the orange '+Environment' button in the upper left hand corner of the screen



This will open a window where the Environment Name, Environment Type, and Description can be entered.

Click on 'Submit' to add the environment

A white dialog box with a thin grey border and a close button (X) in the top right corner. The title "Create Environment" is in bold black text at the top left. Below the title are three input fields: "Environment Name" with a 20-character limit, "Environment Type" with a dropdown menu currently showing "Live", and "Environment Description" with a 200-character limit. A "Submit" button is located at the bottom left of the dialog box.

**Create Environment** ✕

Environment Name  
20 chars max (lowercase latin characters, numbers and dashes only)

Environment Name

Environment Type  
Live ▾

Environment Description  
200 chars max

Environment Description

Submit



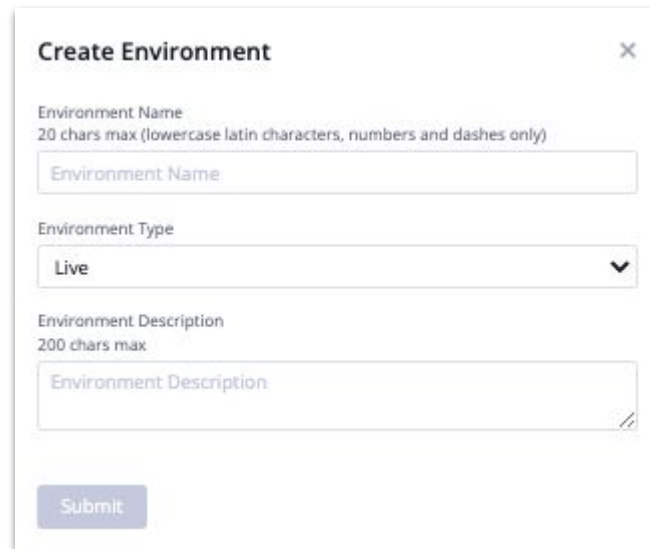


# Environments

In the environment type, there is an option for a Sandbox or Live environment.

The Sandbox environment should be used if you are trying out a new workflow, feature, etc. before moving it to your Live environment.

The Live environment is where your organization will have all live data and perform everyday tasks.



The screenshot shows a 'Create Environment' dialog box with a close button (X) in the top right corner. It contains three input fields: 'Environment Name' (with a note '20 chars max (lowercase latin characters, numbers and dashes only)'), 'Environment Type' (a dropdown menu currently showing 'Live'), and 'Environment Description' (with a note '200 chars max'). A 'Submit' button is located at the bottom left of the dialog.



# Users

The users tab will show the following: a Welkin users full name, email, environments to which they have access to, if SSO and 2FA are active, the users status, and if they have been assigned a license.

### Users

Send Invite  
 Environment Region License Seat Status Apply Filters  
1 - 4 of 4 20/Page  



<input type="checkbox"/>	User Full Name	Email	Environments	SSO	2FA	Status	License Seat	
<input type="checkbox"/>	Albert Pinto	albert.pinto@welkinhealth.com	sample, sandbox, testing, live-test	-	-	Active	Unassigned	
<input type="checkbox"/>	Erin Stanchek	erin.stanchek+live@welkinhealth.com	sample, sandbox, testing, live-test	-	-	Active	Unassigned	
<input type="checkbox"/>	Slava D	slava@welkinhealth.com	sample, sandbox, testing, live-test	-	-	Active	Unassigned	
<input type="checkbox"/>	-	zachary.douglas+erin-live@welkinhealth.com	sample, sandbox, testing, live-test, testing-two	-	-	Active	Assigned	

  
1 - 4 of 4 20/Page



# Users

The right hand column of a user will give you the option to reset the users password or copy the user's profile

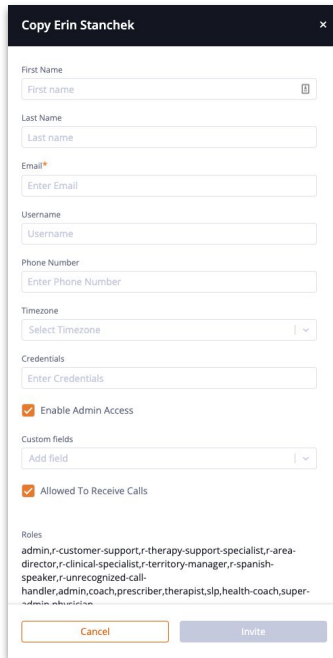
<input type="checkbox"/>	Erin Stanchek	erin.stanchek+live@welkinhealth.com	sample, sandbox, testing, live-test	-	-	Active	Unassigned		
--------------------------	---------------	-------------------------------------	-------------------------------------	---	---	--------	------------	---	---



# Users

Copying the user profile will allow the same roles and permissions to be applied to a new user.

It also allows for enabling/disabling admin access or the ability to receive calls.



The screenshot shows a user profile form titled "Copy Erin Stanchek". The form contains the following fields and options:

- First Name:** Input field with "First name" placeholder and a copy icon.
- Last Name:** Input field with "Last name" placeholder.
- Email:** Input field with "Enter Email" placeholder.
- Username:** Input field with "Username" placeholder.
- Phone Number:** Input field with "Enter Phone Number" placeholder.
- Timezone:** Dropdown menu with "Select Timezone" placeholder.
- Credentials:** Input field with "Enter Credentials" placeholder.
- Enable Admin Access:** Checked checkbox.
- Custom fields:** Dropdown menu with "Add field" placeholder.
- Allowed To Receive Calls:** Checked checkbox.
- Roles:** A list of roles including "admin,r-customer-support,r-therapy-support-specialist,r-area-director,r-clinical-specialist,r-territory-manager,r-spanish-speaker,r-unrecognized-call-handler,admin,coach,prescriber,therapist,slp,health-coach,super-admin,super-admin".

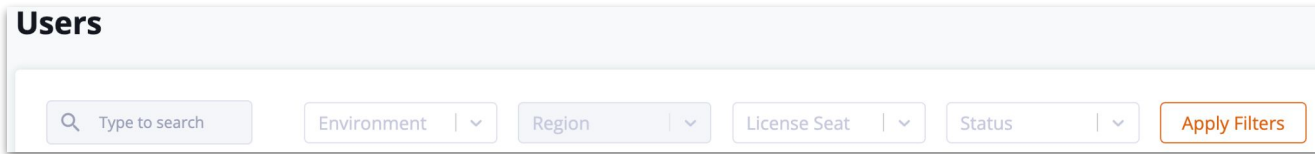
At the bottom of the form are two buttons: "Cancel" and "Invite".



# Users

Users can be filtered and searched by:

- Environment
- Region
- License Seat
- Status



The screenshot shows a user interface for filtering users. It features a search bar with a magnifying glass icon and the text "Type to search". To the right of the search bar are four dropdown menus labeled "Environment", "Region", "License Seat", and "Status", each with a downward arrow icon. To the right of these dropdowns is an orange button labeled "Apply Filters".



# Users

Clicking on an individual user will open their User Profile and allow for editing the following items:

- User Information
- Security
- Accesses, Policies, Roles, Territories
- Admin



# Users: User Information

User information includes items such as the email, phone, and time zone information of the user:

## User Information Edit

Username	root
Email	zachary.douglas@welkinhealth.com <a href="#">Change</a>
Phone number	+13609841813
Locale	EN (United States)
Timezone:	US/Pacific
Id:	5236b055-0b85-4680-b168-0d32bfb83d80
Credentials:	-
Allowed To Receive Calls:	False
Zoom Id:	2397141816
Designations:	DIRECTOR



# Users: Security

The Security section is where you assign a license seat, set a user to active/inactive, and enable SSO or 2FA for the user (if applicable):

## Security

License Seat  Assigned

User Status  Active

Single Sign On  Inactive

**▲ SSO is not configured in your Organization. Go to Security Settings →**

Password  Active Confirmed Reset Password

2F Authentication  Inactive





# Users: Accesses, Policies, Roles, Territories

Click on the pad/paper on the right of a particular environment name to provision roles, policies, or regions or territories to a user.

The screenshot displays a user management interface. On the left, a user profile for 'root' is shown with details such as email (zachary.douglas@welkinhealth.com), phone number (+13609841813), locale (EN (United States)), and designations (DIRECTOR). On the right, user status and security settings are visible, including 'License Seat: Assigned', 'User Status: Active', and 'Password: Active Confirmed'. A warning message states 'SSO is not configured in your Organization. Go to Security Settings'. Below the profile is a table titled 'Accesses, Policies, Roles, Territories' with columns for Environment, Care, and Designer. The table lists two environments: 'testing' and 'wel-demo', both with active status indicators. At the bottom left, 'Admin Access' settings are shown, including 'Administration' and 'Security Audit' (both active), and 'Data Audit' (inactive for 'testing', active for 'wel-demo'). On the right, an 'Edit User Security' modal is open, showing dropdown menus for 'Environments' (testing), 'Roles' (super\_admin), 'Primary role' (super\_admin), 'Policies', 'Region' (National), and 'Territories' (National). The modal includes 'Save' and 'Cancel' buttons at the bottom.







Environment	Care	Designer
testing		
wel-demo		

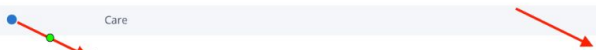
Environment	Care	Designer
testing		
wel-demo		



# Users: Accesses, Policies, Roles, Territories - cont.

Or simply toggle on/off access to Care and Designer for an Environment as needed:

Accesses, Policies, Roles, Territories			
Environment	Care	Designer	
▶ testing			
▶ wel-demo			



# Users: Admin

Use the available toggles under Admin to provide a user access to different areas of Admin: Admin tool, Security Audits, and Data Audits

### Admin Access

Administration	<input checked="" type="checkbox"/>
Security Audit	<input checked="" type="checkbox"/>
Data Audit	<input type="checkbox"/> testing <input checked="" type="checkbox"/> wel-demo



# User Attributes

Custom User Attributes are optional user fields

You can search for user attributes by:

- Typing in the search bar
- Status (Inactive, Hidden, Read-Only, Editable)
- Type
- Predefined or Custom

## Custom User Attributes



Type to search

Status ▾

Type ▾



Predefined



Custom



# User Attributes

The Predefined User Attributes have specific characteristics built by the Welkin team to accommodate for a known use case.

Clicking on the pen and pencil icon in the right hand column will allow you to edit the user attribute.

Name	ID	Type	Status	
<b>PREDEFINED</b>				
Zoom Id	zoomid	text	Inactive	
Acuity Scheduling Id	acuitySchedulingId	text	Inactive	
Territory Address	territoryAddress	text	Inactive	
Clinic Name	clinicName	text	Inactive	
Npi	npi	text	Inactive	
Designations	designations	select	Inactive	

### Edit User Attribute

Name\*

ID\*

Status

Inactive  Hidden  Readonly  Editable

Type\*

Required



























Min Length  Max Length



# User Attributes

Custom Attributes do not have a specific use case defined by the Welkin team, but can be used or modified for your purposes.

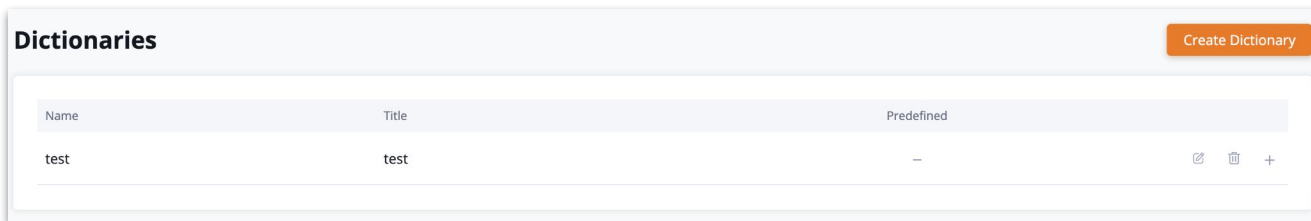
Clicking on the pen and pencil icon in the right hand column will allow you to edit the Custom User Attribute. In addition, you also have the option to delete the attribute by clicking on the trash can icon.




CUSTOM				
Territory Phone Number	territoryPhoneNumber	text	Inactive	 
Provider Name	providerName	text	Inactive	 
License	license	text	Inactive	 
Title	title	text	Inactive	 
Provider Corporation	providerCorporation	text	Inactive	 
Virtual Service Provider	virtualServiceProvider	text	Inactive	 
In Person Service Provider	inPersonServiceProvider	text	Inactive	 
Modality	modality	text	Inactive	 
Speciality	speciality	text	Inactive	 
Acuity Domain	acuityDomain	text	Inactive	 
Target Hours	targetHours	float	Inactive	 
External Ref Acuity Id	externalRefAcuityId	uuid	Inactive	 
External Ref Elation Id	externalRefElationId	uuid	Inactive	 



# Dictionaries

Dictionaries allow you to input data sets (such as CPT or ICD codes) that can be utilized across Welkin.



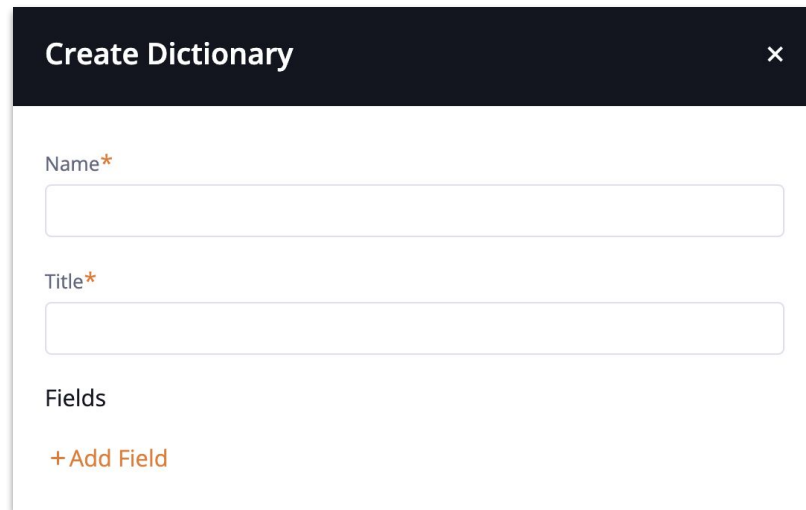
Name	Title	Predefined	
test	test	-	  

# Dictionaries

There are no dictionaries available by default. To create a Dictionary, click on the orange 'Create Dictionary' button at the top right of the screen.

Enter the Name and Title of the dictionary you wish to create.

Since Dictionaries typically include large sets of data, it is required to enter a JSM ticket with the data set to be uploaded into the dictionary.



The screenshot shows a modal window titled "Create Dictionary" with a close button (X) in the top right corner. The form contains the following elements:

- A label "Name\*" followed by a text input field.
- A label "Title\*" followed by a text input field.
- A section header "Fields" followed by an orange "+ Add Field" button.





# Security Settings

The Security Settings screen allows you to change the following settings:

- General Settings
- Password Requirements
- Single Sign-On
- Two-Factor Authentication

The screenshot displays the 'Security Settings' interface, which is organized into four distinct panels, each with its own 'Save' button.

- General:** Contains two input fields. 'PFA link expiration days' is set to 7, and 'Temporary password validity days' is also set to 7.
- Password:** Contains a 'Password length' input field set to 8, and four checked checkboxes for 'Upper Case Character', 'Lower Case Character', 'Number', and 'Special character'.
- Single Sign-On:** Features a 'Status' toggle set to 'Inactive' and a 'Provider Type\*' dropdown menu. Below the dropdown is an 'Instruction' icon.
- Two-Factor Authentication:** Features a 'Status' toggle set to 'Inactive' and a 'Message\*' text area containing the placeholder text '({###})'.



# Security Settings

General Settings include

- PFA Link Expiration Days
- Temporary Password Validity Days

Change the number of days in this field if you wish to override the default settings (this is set to 7 days by default)

### General

PFA link expiration days

Temporary password validity days

[Save](#)



# Security Settings

The Password Settings allow you to override the default requirements that Welkin has preset:

- Password Length: (default is 8 characters)
- Upper Case Character
- Lower Case Character
- Number
- Special Character

### Password

Password length	<input type="text" value="8"/>
Upper Case Character	<input checked="" type="checkbox"/>
Lower Case Character	<input checked="" type="checkbox"/>
Number	<input checked="" type="checkbox"/>
Special character	<input checked="" type="checkbox"/>

Save

# Security Settings

To activate Single Sign-On, move the toggle button next to status from left to right and the status should change to 'Active'.

Select the Provider Type from the drop-down.

### Single Sign-On

Status  Inactive

Provider Type\*

[ⓘ Instruction](#)



# Security Settings

A new text box will appear called 'MetaData URL'. Clicking on the orange 'Instruction' link will show the setting changes that need to be made with your SSO provider.

### Single Sign-On

Status  Active

Provider Type\*  x | v

Metadata Url\*

[i Instruction](#)

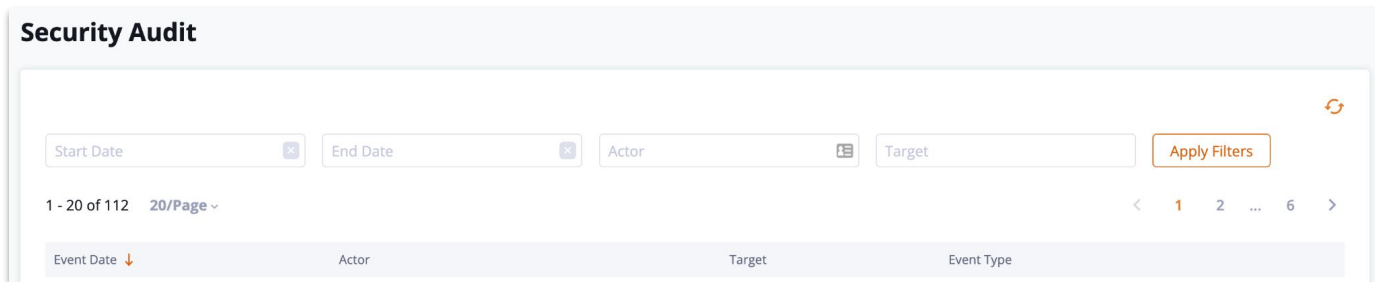


# Security Audit

The Security Audit records all actions taken by a user within the Welkin system. They are entered by Event Date, Actor, Target, and Event Type.

The Security Audit can be searched and filtered by

- Start Date
- End Date
- Actor
- Target



The screenshot displays the 'Security Audit' interface. At the top, there is a search bar with four input fields: 'Start Date', 'End Date', 'Actor', and 'Target'. Each field has a small 'x' icon for clearing the input. To the right of these fields is an 'Apply Filters' button and a refresh icon. Below the search bar, there is a pagination control showing '1 - 20 of 112' and '20/Page'. At the bottom, a table header is visible with columns: 'Event Date', 'Actor', 'Target', and 'Event Type'. The 'Event Date' column has a downward arrow indicating it is the current sort order.

# Security Audit

Clicking on the plus sign to the right of each event will open up a JSON file showing the details of the event.

```
May 23, 2022 10:30 AM API_CLIENT_ACCESS_UPDATED
1 {
2   sentAt: '2022-05-23T14:30:35.510Z',
3   subjectUsername: '...',
4   subjectUserId: '...',
5   subjectActor: 'USER',
6   subjectFullName: '...',
7   objectUsername: '...',
8   objectUserId: '...',
9   objectActor: 'API_CLIENT',
10  objectFullName: '...',
11  eventSubtype: 'API_CLIENT_ACCESS_UPDATED',
12  record: {
13    createdAt: '2022-05-23T14:29:19.990Z',
14    userRegionsEnabled: false,
15    instanceAccesses: [
16      {
17        instanceId: '...',
18        instanceName: 'sample',
19        instanceDescription: '...',
20        workshopAccessEnabled: false,
21        auditDataAccessEnabled: false,
22        userEmailWithInstanceDomain: null
23      }
24    ],
25    migrationAPIAccessEnabled: false,
26    adminAccessEnabled: false,
27    apiClientId: '...',
28    id: '...',
29    userProvisionEnabled: false,
30    userAttributeEnabled: false,
31    updatedAt: '2022-05-23T14:30:35.315Z'
32  }
33 }
```

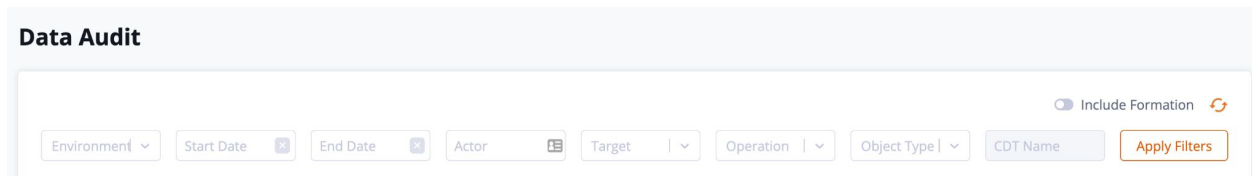


# Data Audit

The Data Audit records all actions that relate to a custom data type.

The Data Audit can be searched and filtered by

- Environment
- Start Date
- End Date
- Actor
- Target
- Operation
- Object Type
- CDT Name



The screenshot shows a 'Data Audit' search and filter interface. It features a header 'Data Audit' and a search bar. Below the search bar, there are several filter fields: 'Environment' (dropdown), 'Start Date' (calendar icon), 'End Date' (calendar icon), 'Actor' (text input), 'Target' (dropdown), 'Operation' (dropdown), 'Object Type' (dropdown), and 'CDT Name' (text input). To the right of these fields, there is a toggle switch for 'Include Formation' and a refresh icon. An 'Apply Filters' button is located at the bottom right of the filter area.

You also have the option to toggle on 'Include Formation', this allows you to view the Welkin systems fields, such as "created at" or "created by"





# Data Audit

Clicking on the plus sign to the right of each event will open up a JSON file showing the details of the event.

```
1  {
2    eventEntity: 'CDT',
3    subjectUsername: '██████████',
4    subjectUserId: '████████████████████████████████████████',
5    subjectActor: 'USER',
6    subjectFullName: '██████████',
7    patientFullName: 'B Patient',
8    patientId: '████████████████████████████████████████',
9    instance: 'sample',
10   cdtName: '_general-visit-note',
11   cdtRelation: 'ASSESSMENT',
12   eventSubtype: 'CDT_UPDATED',
13   sentAt: '2022-07-13T17:27:33.578Z',
14   record: {
15     patientId: '████████████████████████████████████████',
16     jsonBody: {
17       id: '████████████████████████████████████████',
18       source_id: '████████████████████████████████████████',
19       created_at: '2022-07-13T17:27:23.687Z',
20       created_by: '██████████',
21       updated_at: '2022-07-13T17:27:23.687Z',
22       updated_by: '██████████',
23       external_id: null,
24       source_name: 'general-visit-note',
25       source_type: 'ASSESSMENT',
26       external_guid: null,
27       created_by_name: '██████████',
28       updated_by_name: '██████████',
29       'cdt-general-note__general_note': 'In progress note'
30     },
31     id: '████████████████████████████████████████',
32     cdtName: '_general-visit-note',
33     cdtId: '████████████████████████████████████████',
34     version: 2
35   }
36 }
```



# Phone Tree Audit

The Phone Tree Audit shows all actions related to routing of incoming calls

The Phone Tree Audit can be searched and filtered by

- Start Date
- End Date
- User Full Name
- Patient Full Name
- Patient MRN
- Patient Phone

### Phone Tree Audit

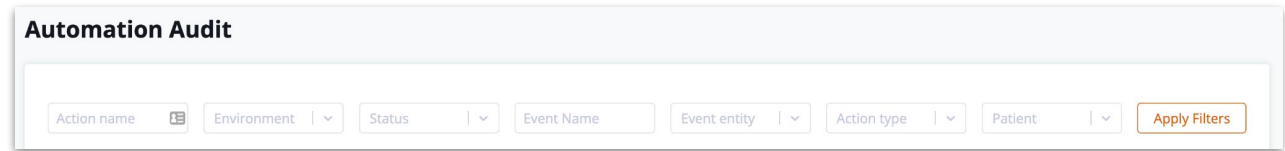
Created	Patient	User	Instance
No Data			

# Automation Audit

The Automation Audit shows all actions related to automated processes built in the Designer application

The Automation Audit can be searched and filtered by

- Action Name
- Environment
- Status
- Event Name
- Event Entity
- Action Type
- Patient



The screenshot shows a filter interface titled "Automation Audit". It contains several input fields for filtering: "Action name" with a search icon, "Environment" with a dropdown arrow, "Status" with a dropdown arrow, "Event Name", "Event entity" with a dropdown arrow, "Action type" with a dropdown arrow, and "Patient" with a dropdown arrow. An "Apply Filters" button is located on the right side of the filter bar.

# Automation Audit

Clicking on the plus sign to the right of each event will open up a JSON file showing the details of the event.

```
1  {
2    id: ' ',
3    automationName: 'auto-encounter-disposition-automation',
4    actionGroupName: ' ',
5    instanceName: 'sample',
6    sentAt: '2022-07-13T17:15:54.184Z',
7    status: ' ',
8    eventEntity: 'ENCOUNTER',
9    eventSubtype: 'ENCOUNTER_CREATED',
10   sourceName: ' ',
11   sourceId: ' ',
12   patientId: ' ',
13   patientName: 'B Patient',
14   errorMessage: 'Instance\'s phone is not found',
15   action: {
16     actionType: 'SMS',
17     messageTemplateName: 'mtmp-encounter-message-template'
18   },
19   details: {}
20 }
```



# Postponed Tasks

The Postponed Tasks screen shows the status of automations with a time delay element

This information can be filtered by

- Environment
- Status

### Postponed Tasks

sample | Status | [Apply Filters](#)

Execution Time	Automation Name	Status	Source	Patient
No Data				

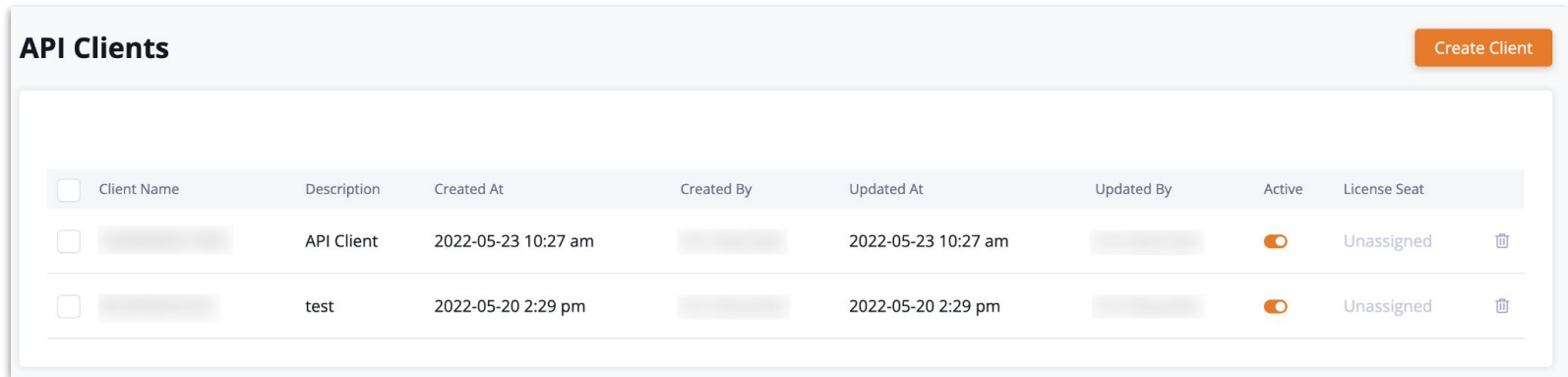




# API Clients

The API Clients screen allows you to view and create API Clients.

Existing clients will be listed, allowing you to toggle each item from active to inactive. You also have the option to delete the client by clicking on the trash can icon in the right hand column of the row.

To create a client, click on the orange 'Create Client' button.



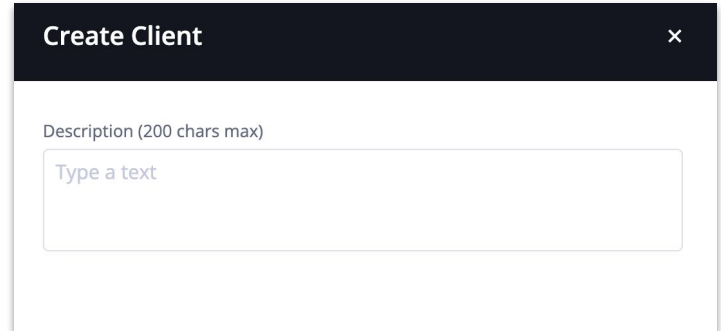
<input type="checkbox"/>	Client Name	Description	Created At	Created By	Updated At	Updated By	Active	License Seat	
<input type="checkbox"/>	[REDACTED]	API Client	2022-05-23 10:27 am	[REDACTED]	2022-05-23 10:27 am	[REDACTED]	<input checked="" type="checkbox"/>	Unassigned	
<input type="checkbox"/>	[REDACTED]	test	2022-05-20 2:29 pm	[REDACTED]	2022-05-20 2:29 pm	[REDACTED]	<input checked="" type="checkbox"/>	Unassigned	



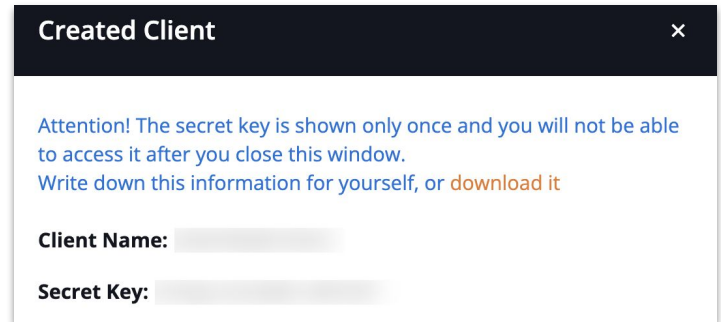
# API Clients

After clicking on the 'Create Client' button, enter a description of the client and click on 'Create'.

Upon clicking 'Create', you will be shown the Client Name and Secret Key. This will only be shown once. Click on the orange 'Download It' link within the message to download the information or store this information securely.



The screenshot shows a dialog box titled "Create Client" with a close button (X) in the top right corner. Below the title bar, there is a label "Description (200 chars max)" and a text input field with the placeholder text "Type a text".



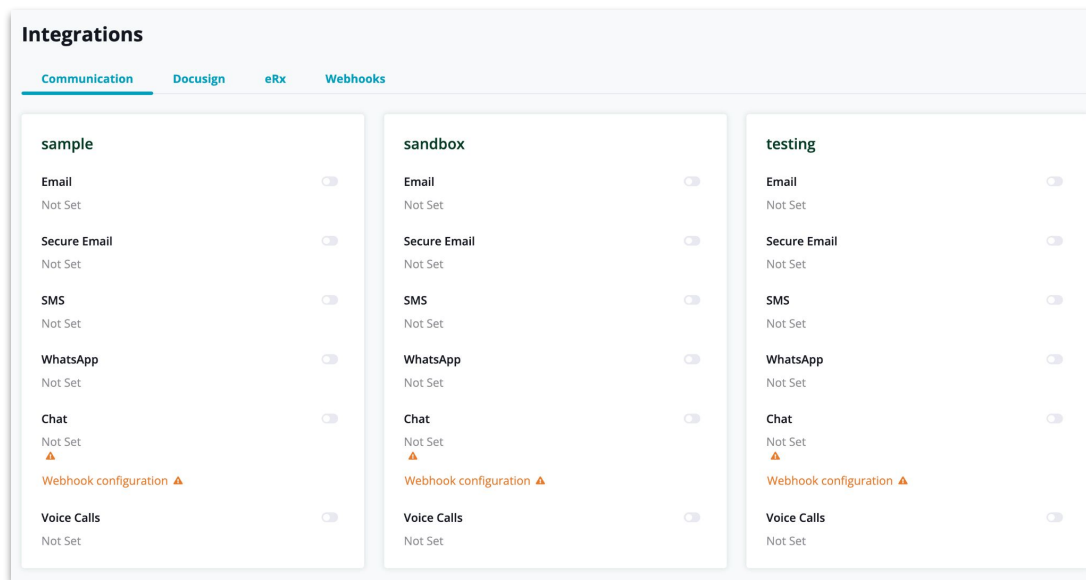
The screenshot shows a dialog box titled "Created Client" with a close button (X) in the top right corner. The main content area contains a warning message: "Attention! The secret key is shown only once and you will not be able to access it after you close this window. Write down this information for yourself, or [download it](#)". Below the message, there are two fields: "Client Name:" followed by a blurred grey box, and "Secret Key:" followed by a blurred grey box.



# Integrations

The Integrations Screen allows you to configure:

- Communications
- Docusign
- eRX
- Webhooks





# Integrations

The Communications screen will allow you to activate the following communications integrations once they have been configured for your organization:

- Email
- Secure Email
- SMS
- WhatsApp
- Chat
- Voice Calls

**sample**

<b>Email</b> Not Set	<input type="checkbox"/>
<b>Secure Email</b> Not Set	<input type="checkbox"/>
<b>SMS</b> Not Set	<input type="checkbox"/>
<b>WhatsApp</b> Not Set	<input type="checkbox"/>
<b>Chat</b> Not Set ⚠️ Webhook configuration ⚠️	<input type="checkbox"/>
<b>Voice Calls</b> Not Set	<input type="checkbox"/>




# API Clients

If your organization will be utilizing Chat functionality, you will need to enter the webhook URL, webhook API Key, and webhook API Secret from your host system.

### sample Webhook Configuration ×

chatWebhookUrl\*

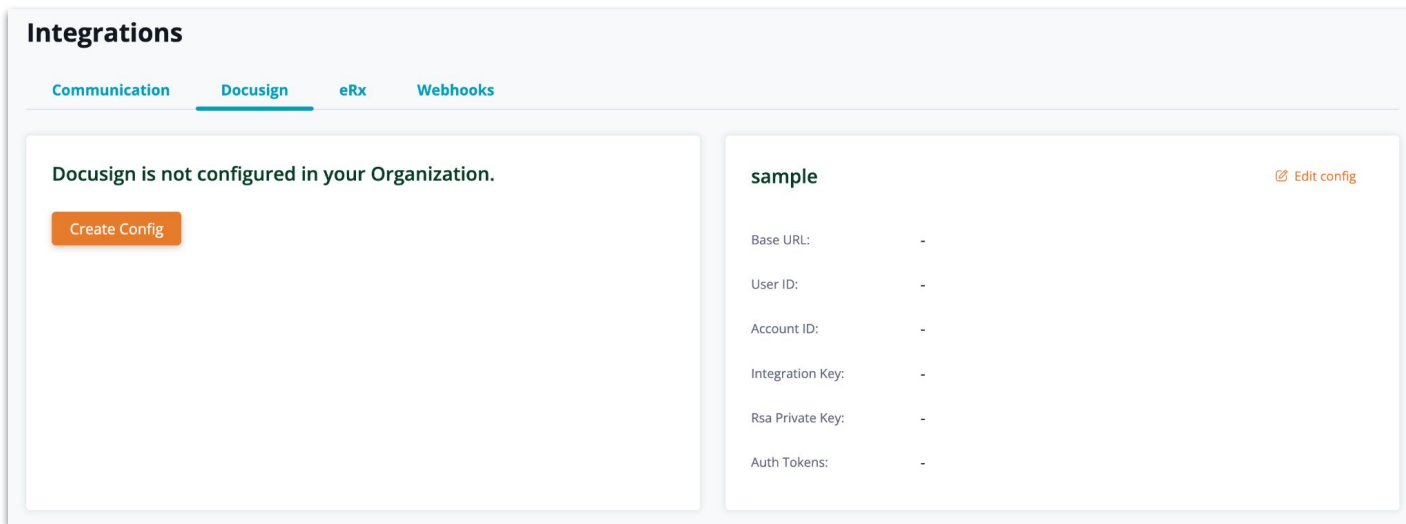
webhookApiKey\*

webhookApiSecret\*



# Integrations

To configure DocuSign for your organization you can enter default configuration details or edit these details per environment. Select 'Create Config' or 'Edit Config' based on your organizations preference.



The screenshot displays the 'Integrations' section of a web application. It features a navigation bar with four tabs: 'Communication', 'DocuSign', 'eRx', and 'Webhooks'. The 'DocuSign' tab is currently selected. Below the navigation bar, there are two main panels. The left panel contains the message 'DocuSign is not configured in your Organization.' and a prominent orange 'Create Config' button. The right panel, titled 'sample', shows a list of configuration fields with their current values, all of which are dashes: 'Base URL:', 'User ID:', 'Account ID:', 'Integration Key:', 'Rsa Private Key:', and 'Auth Tokens:'. An 'Edit config' link with a pencil icon is located in the top right corner of this panel.

Field	Value
Base URL:	-
User ID:	-
Account ID:	-
Integration Key:	-
Rsa Private Key:	-
Auth Tokens:	-



# Integrations

Enter the following information from your DocuSign account:

- Base URL
- User ID
- Account ID
- Integration Key
- Select 'Generate Token' to view token
- RSA Private Key (Enter the DocuSign RSA Private Key)

For more information on the DocuSign integration, please contact your integration specialist for the DocuSign Integration Documentation.

### Create Default Config ×

Base URL

User ID

Account ID

Integration Key

Auth Tokens

-

[Generate token](#)

Rsa Private Key



# Integrations

If your organization will be utilizing eRx (Dr. First), the integration can be toggled from inactive to active once the configuration has been completed.

The screenshot displays the 'Integrations' section of a user interface. At the top, there are four tabs: 'Communication', 'DocuSign', 'eRx', and 'Webhooks'. The 'eRx' tab is currently selected and highlighted with a blue underline. Below the tabs, there are five integration cards arranged in two rows. Each card has a title, a 'Status' field with a toggle switch, and a message indicating that the eRx integration is not configured for that environment.

Integration Name	Status	Configuration Status
sample	Inactive	eRx is not configured for this environment.
sandbox	Inactive	eRx is not configured for this environment.
testing	Inactive	eRx is not configured for this environment.
live-test	Inactive	eRx is not configured for this environment.
testing-two	Inactive	eRx is not configured for this environment.



# Integrations - Webhooks

Webhooks that have been created can be searched and filtered by environment and status.

## Integrations

[Communication](#) [DocuSign](#) [eRx](#) [Webhooks](#)

20/Page

Title	Name (Technical)	URL	Status
No Data			



# Integrations - Webhooks

Clicking on the three dots in the right hand column of the Webhook will allow you to Edit or Activate the Webhooks

## Integrations

[Communication](#) [DocuSign](#) [eRx](#) [Webhooks](#)

live-test | Select Status

1 - 1 of 1 20/Page

Title	Name (Technical)	URL	Status	
Wh Patient Id Generator	wh-patient-id-generator	-	Inactive	...



# Integrations - Webhooks

In the Edit screen, you can change the status of the webhook from inactive to active, edit the title.

The screenshot shows the 'Edit' screen for a webhook. At the top, there is a dark header with a close button (X). Below the header, the 'Name (Technical)' field is displayed with a 'View Source' link and a 'Test' button. A dropdown menu is set to 'Inactive'. The 'Title' field is a text input. The 'URL\*' field is a text input with the placeholder 'Enter a URL'. Below these are sections for 'Headers', 'Query', 'Default fields', and 'Custom fields', each with a '+ Add' button. The 'Default fields' section contains a table with the following data:

instanceName	tenantName	sourceName	sourceId
patientId	eventEntity	eventSubtype	url

At the bottom, there are 'Cancel' and 'Save' buttons.







Thank you!