welkin

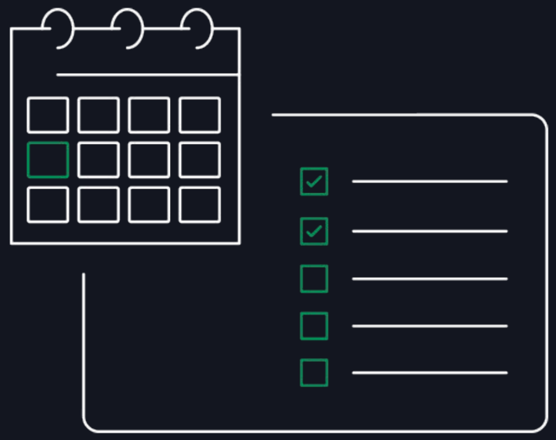
V

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

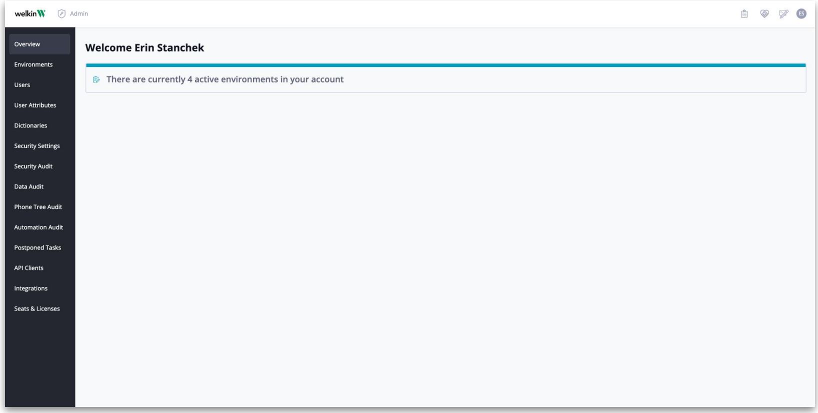
V



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.

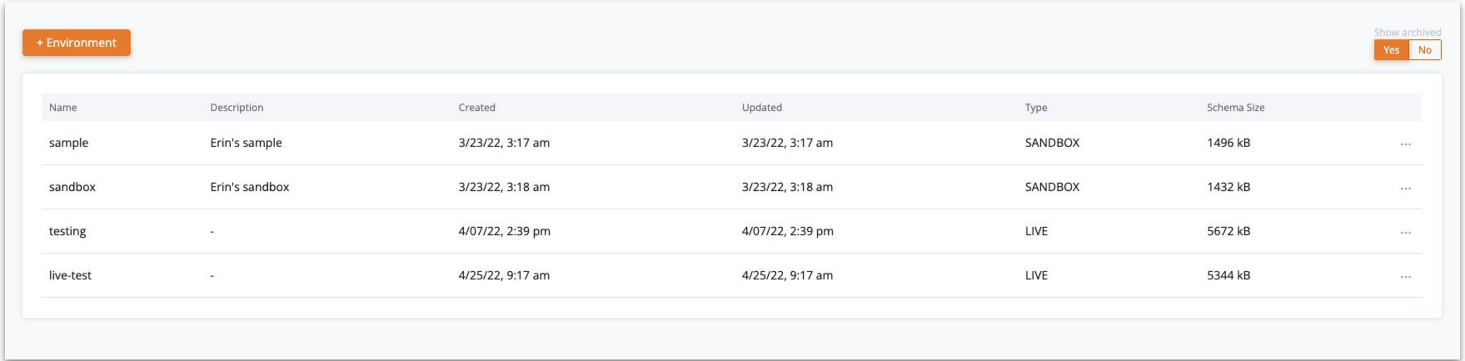
The icons at the top right of the screen from left to right:

- 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



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	
testing	-	4/07/22, 2:39 pm	4/07/22, 2:39 pm	LIVE	5672 kB	

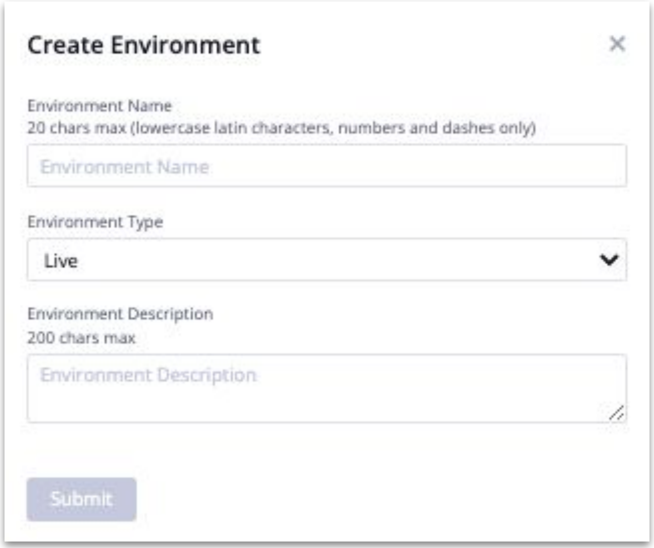
Go to Designer
Edit Environment
Archive Environment

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

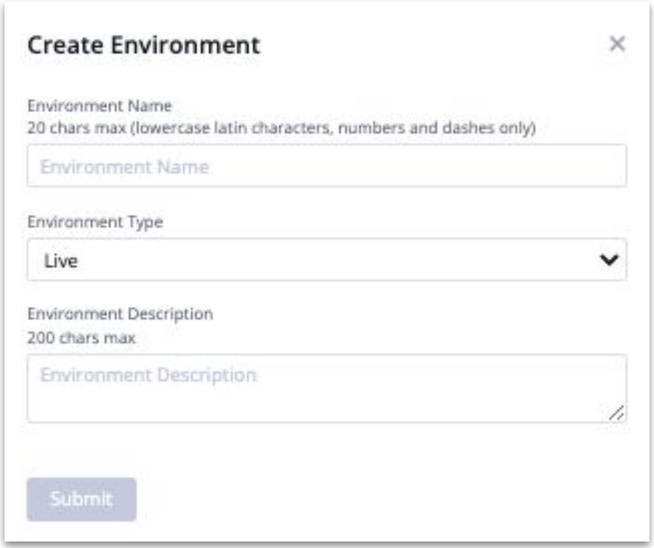


Environments

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

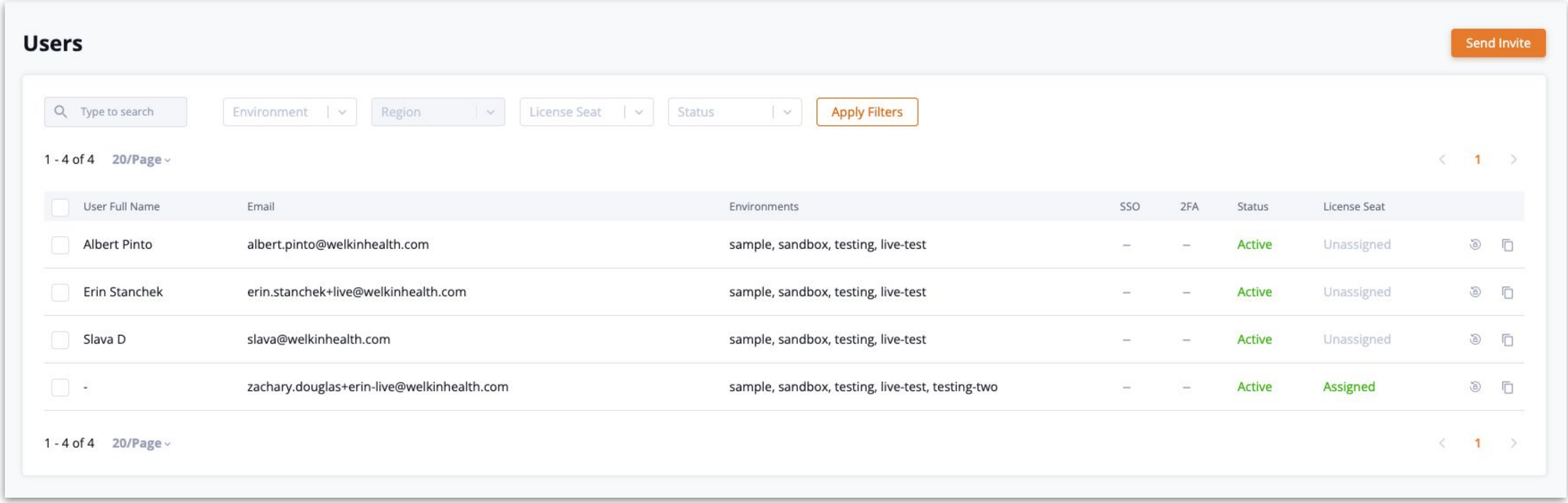
The Sandbox environment should be used if you are trying out a new workflow, feature, etc. before moving it to your Live environment.

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



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

Type to search | Environment | Region | License Seat | Status | Apply Filters

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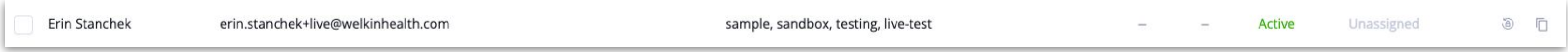
	User Full Name	Email	Environments	SSO	2FA	Status	License Seat
	Albert Pinto	albert.pinto@welkinhealth.com	sample, sandbox, testing, live-test	–	–	Active	Unassigned
	Erin Stanchek	erin.stanchek+live@welkinhealth.com	sample, sandbox, testing, live-test	–	–	Active	Unassigned
	Slava D	slava@welkinhealth.com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

1 - 4 of 4 20/Page

Users

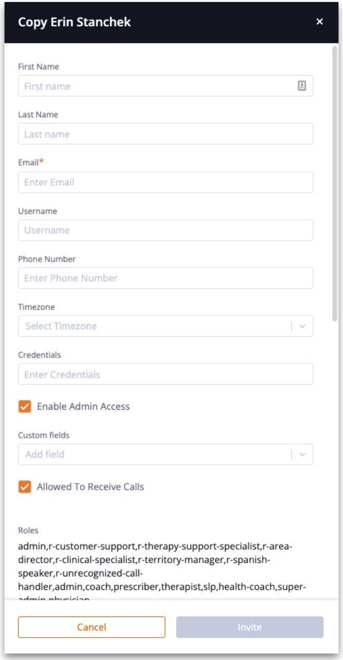
The right hand column of a user will give you the option to reset the users password or copy the user's profile



Users

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

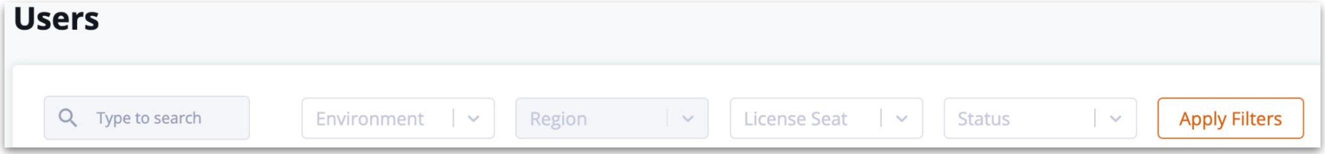
It also allows for enabling/disabling admin access or the ability to receive calls.



Users

Users can be filtered and searched by:

- Environment
- Region
- License Seat
- Status



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:

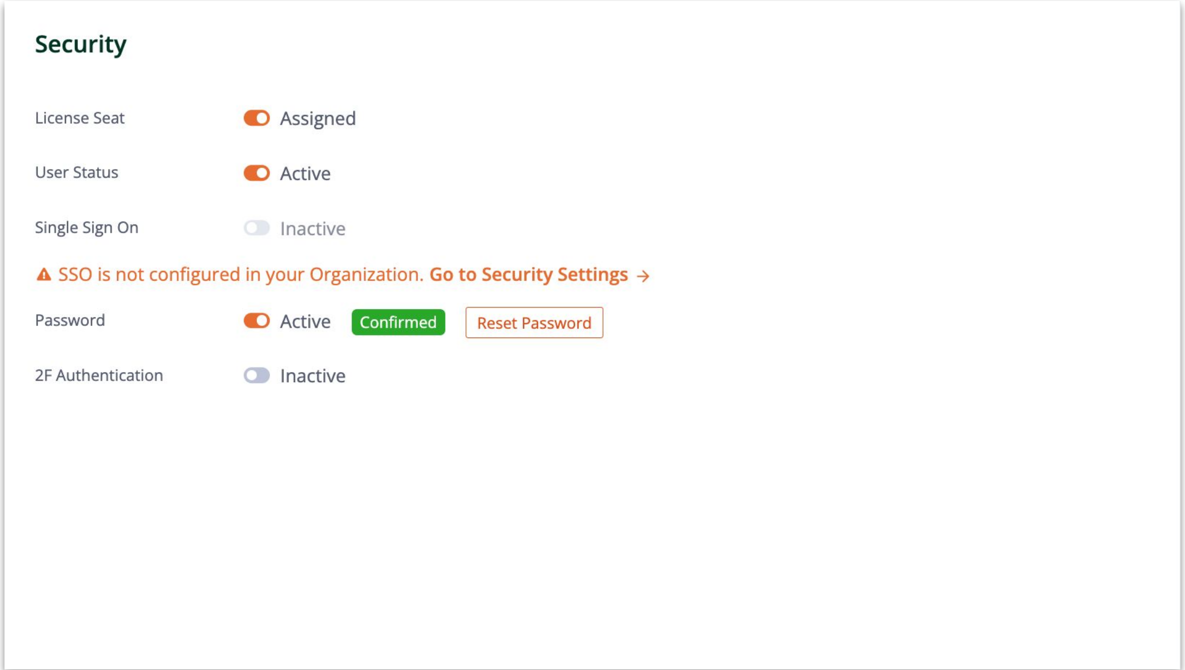
User Information

Edit

Username	root
Email	zachary.douglas@welkinhealth.com Change
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

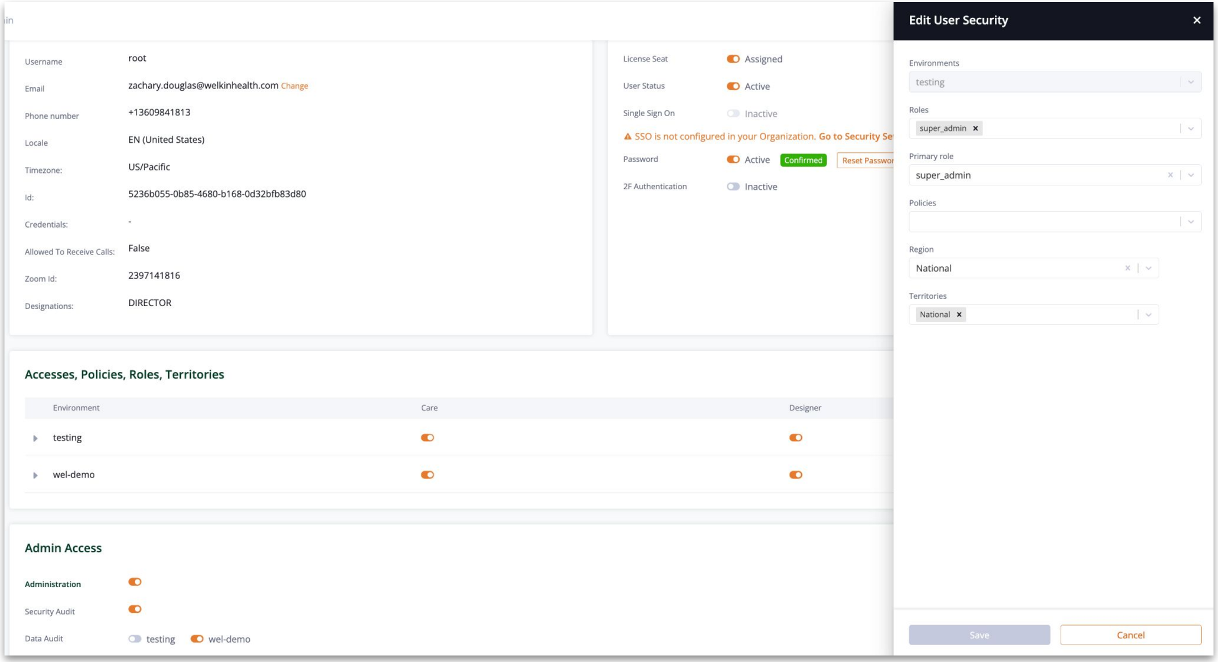
Users: Security

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):



Users: Accesses, Policies, Roles, Territories

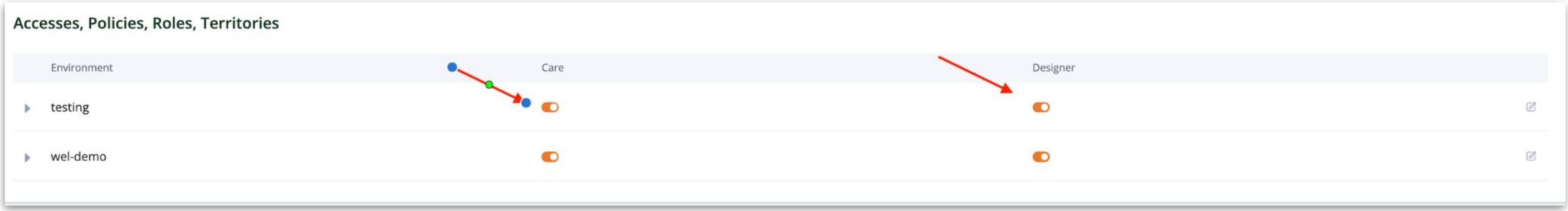
Click on the pad/paper on the right of a particular environment name to provision roles, policies, or regions or territories to a user.



CONFIDENTIAL

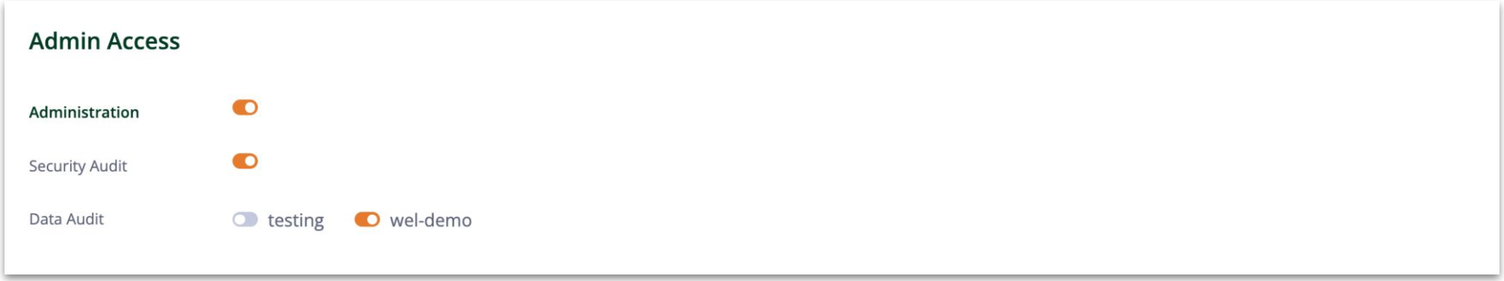
Users: Accesses, Policies, Roles, Territories - cont.

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



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

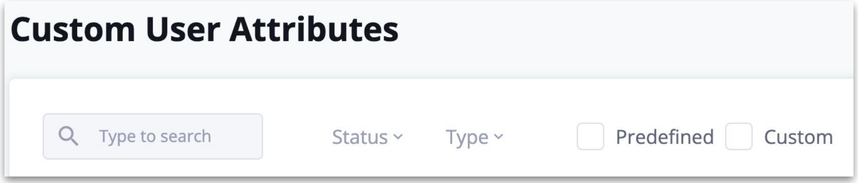


User Attributes

Custom User Attributes are optional user fields

You can search for user attributes by:

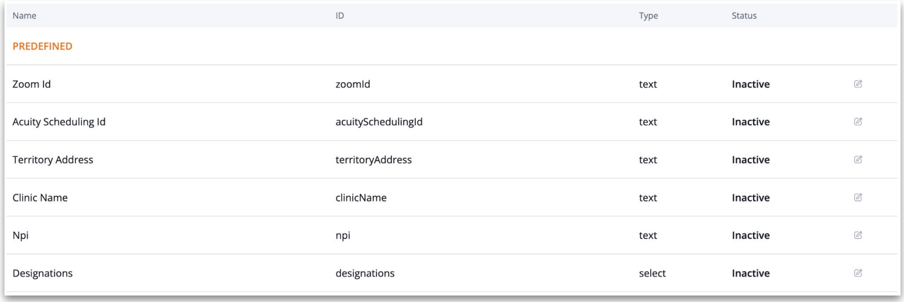
- Typing in the search bar
- Status (Inactive, Hidden, Read-Only, Editable)
- Type
- Predefined or Custom



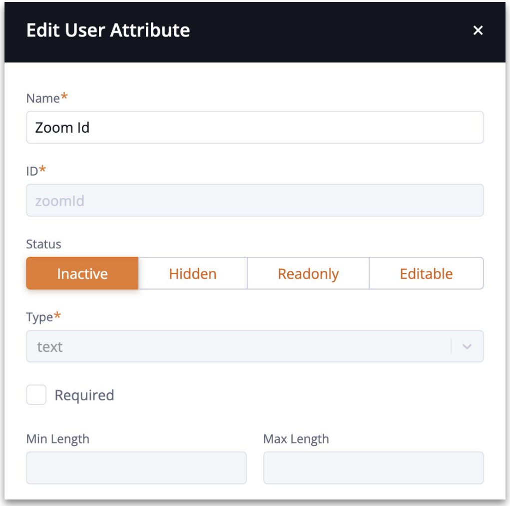
User Attributes

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
PREDEFINED			
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



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.

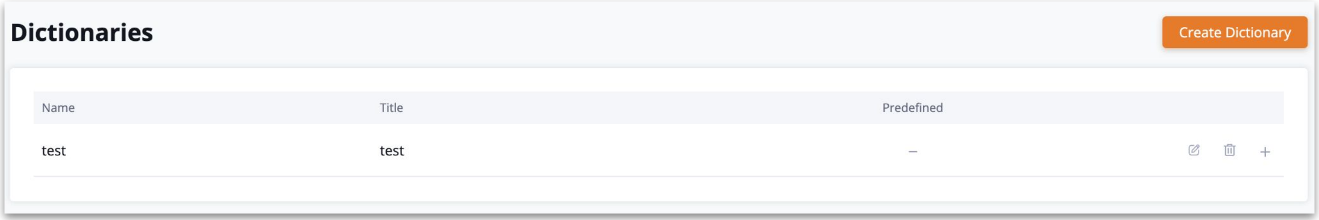
Clicking on the pen and pencil icon in the right hand column will allow you to edit the Custom User Attribute. In addition, you also have the option to delete the attribute by clicking on the trash can icon.

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.

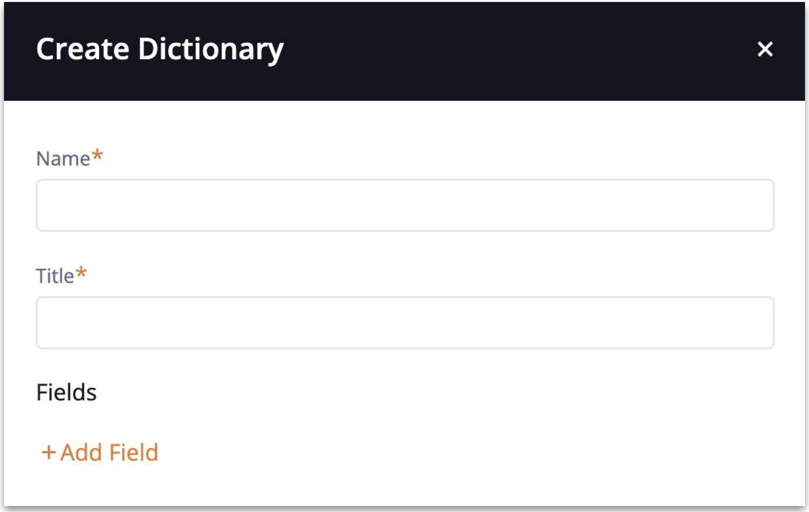


Dictionaries

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.

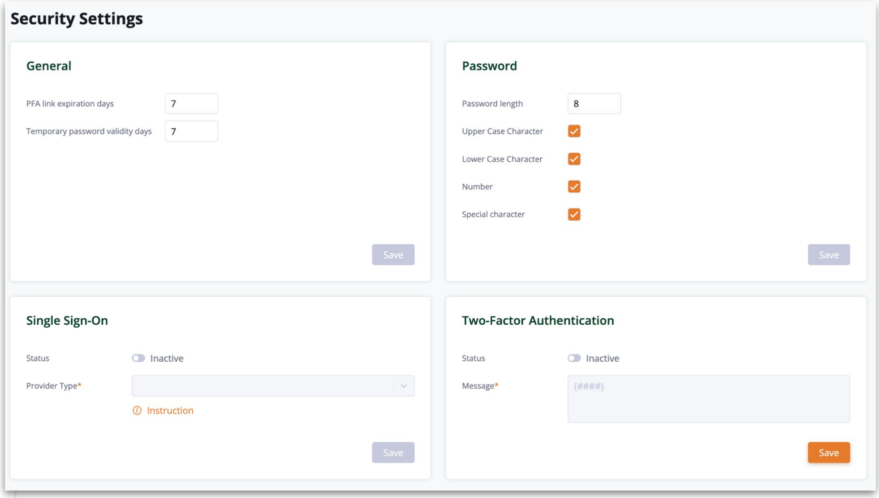
Since Dictionaries typically include large sets of data, it is required to enter a JSM ticket with the data set to be uploaded into the dictionary.



Security Settings

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

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

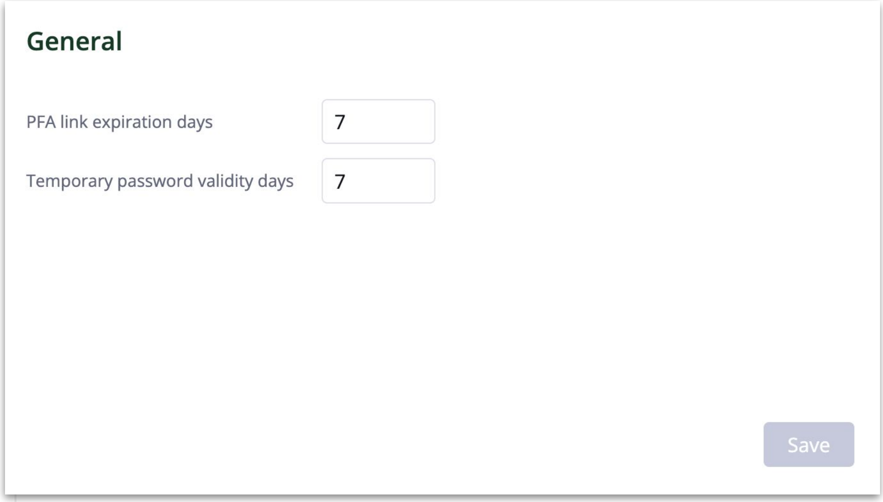


Security Settings

General Settings include

- PFA Link Expiration Days
- Temporary Password Validity Days

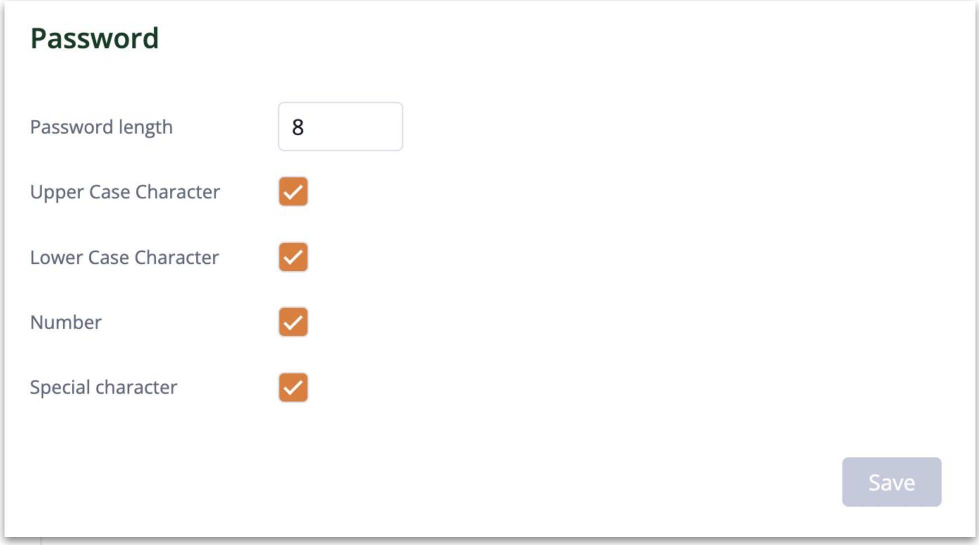
Change the number of days in this field if you wish to override the default settings (this is set to 7 days by default)



Security Settings

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

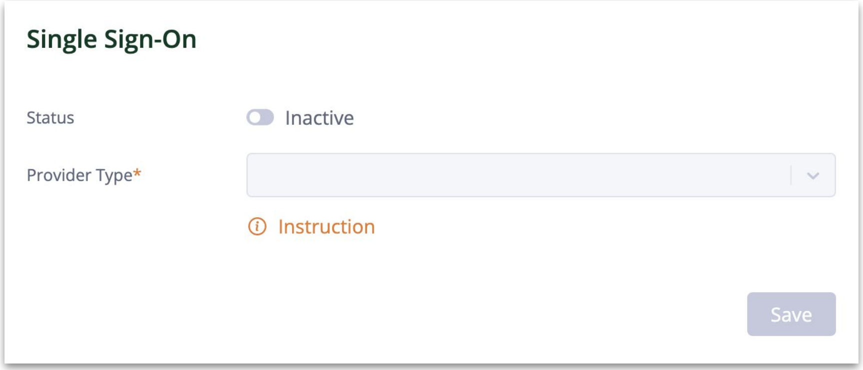
- Password Length: (default is 8 characters)
- Upper Case Character
- Lower Case Character
- Number
- Special Character



Security Settings

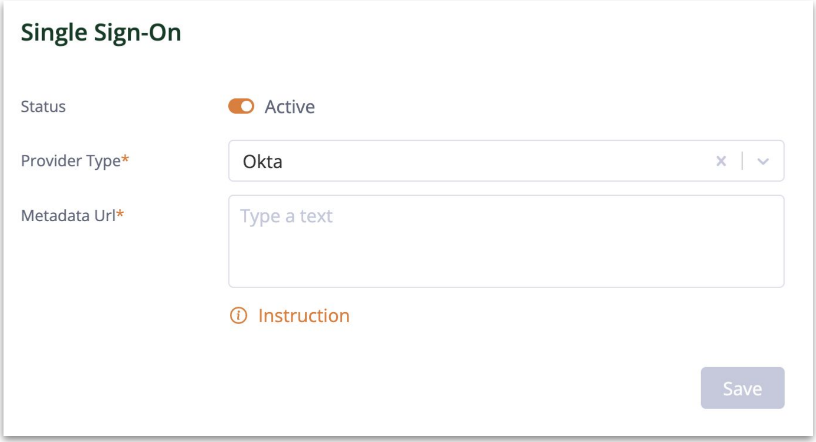
To activate Single Sign-On, move the toggle button next to status from left to right and the status should change to ‘Active’.

Select the Provider Type from the drop-down.



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.

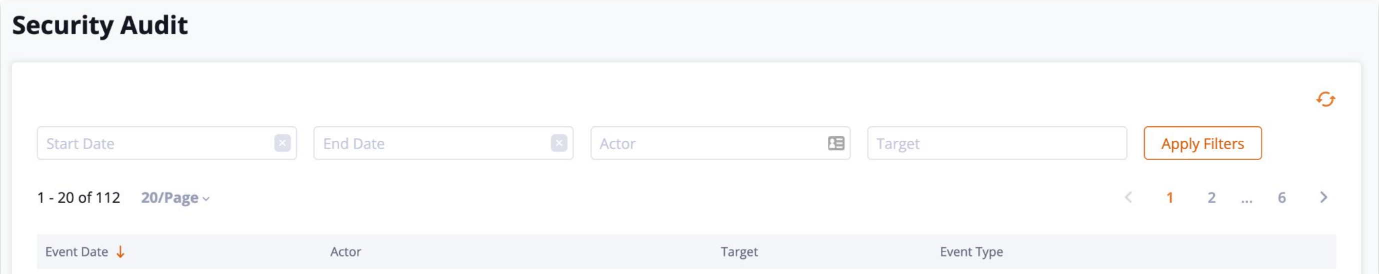


Security Audit

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



Security Audit

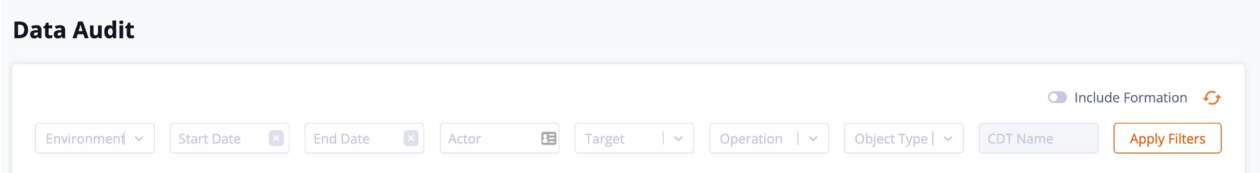
Clicking on the plus sign to the right of each event will open up a JSON file showing the details of the event.

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



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.

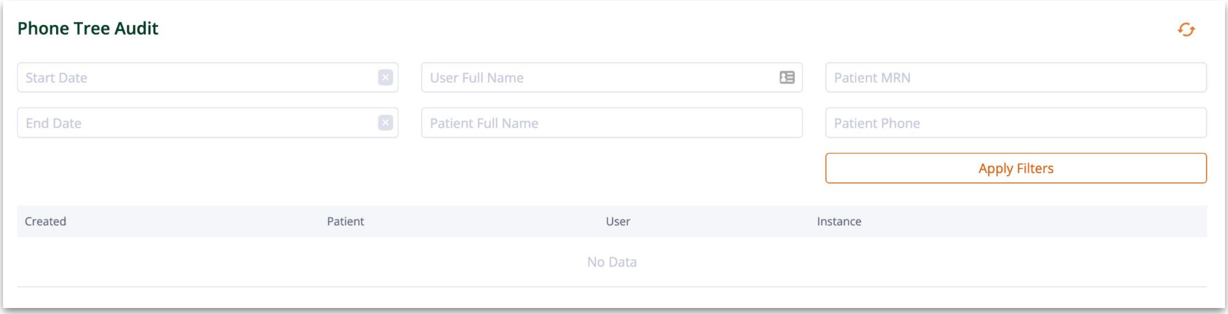

```
{
  eventEntity: 'CDT',
  subjectUsername: '[illegible]',
  subjectUserId: '[illegible]',
  subjectActor: 'USER',
  subjectFullName: '[illegible]',
  patientFullName: 'B Patient',
  patientId: '[illegible]',
  instance: 'sample',
  cdtName: '_general-visit-note',
  cdtRelation: 'ASSESSMENT',
  eventSubtype: 'CDT_UPDATED',
  sentAt: '2022-07-13T17:27:33.578Z',
  record: {
    patientId: '[illegible]',
    jsonBody: {
      id: '[illegible]',
      source_id: '[illegible]',
      created_at: '2022-07-13T17:27:23.687Z',
      created_by: '[illegible]',
      updated_at: '2022-07-13T17:27:23.687Z',
      updated_by: '[illegible]',
      external_id: null,
      source_name: 'general-visit-note',
      source_type: 'ASSESSMENT',
      external_guid: null,
      created_by_name: '[illegible]',
      updated_by_name: '[illegible]',
      'cdt-general-note__general_note': 'In progress note'
    },
    id: '[illegible]',
    cdtName: '_general-visit-note',
    cdtId: [illegible]',
    version: 2
  }
}
```

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

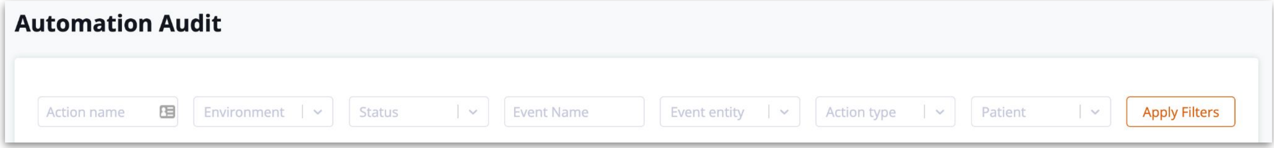


Automation Audit

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



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.

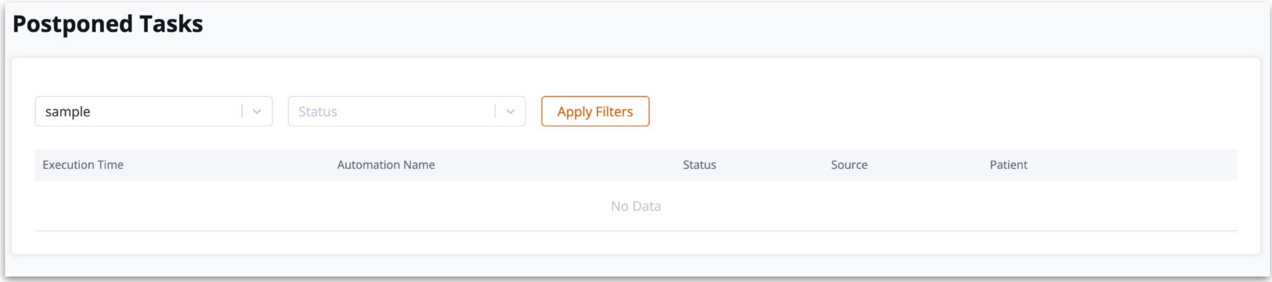
```
{
  id: '[redacted]',
  automationName: 'auto-encounter-disposition-automation',
  actionGroupName: '[redacted]',
  instanceName: 'sample',
  sentAt: '2022-07-13T17:15:54.184Z',
  status: '[redacted]',
  eventEntity: 'ENCOUNTER',
  eventSubtype: 'ENCOUNTER_CREATED',
  sourceName: '[redacted]',
  sourceId: '[redacted]',
  patientId: '[redacted]',
  patientName: 'B Patient',
  errorMessage: 'Instance\'s phone is not found',
  action: {
    actionType: 'SMS',
    messageTemplateName: 'mtmp-encounter-message-template'
  },
  details: {}
}
```

Postponed Tasks

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

This information can be filtered by

- Environment
- Status

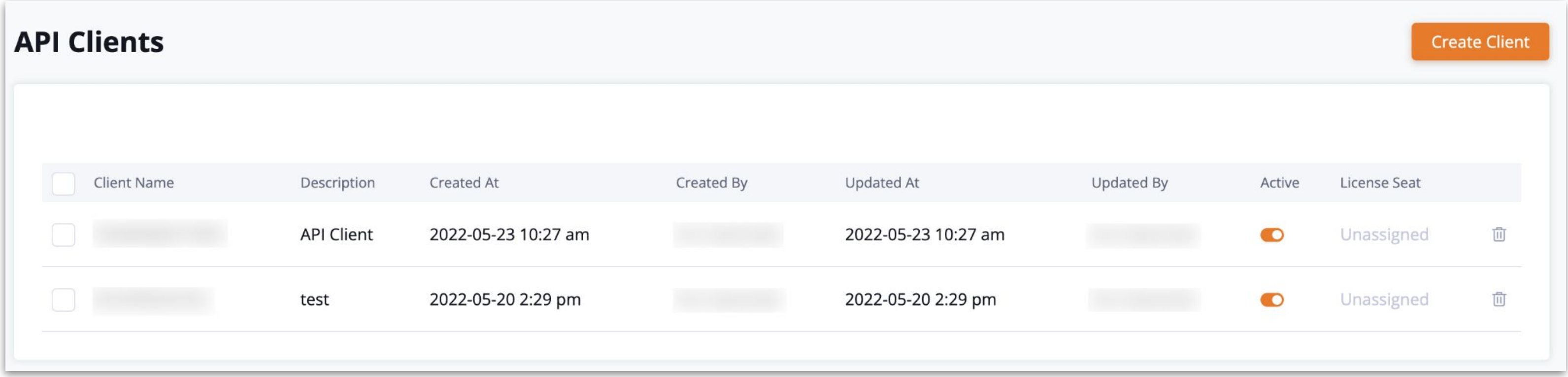


API Clients

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

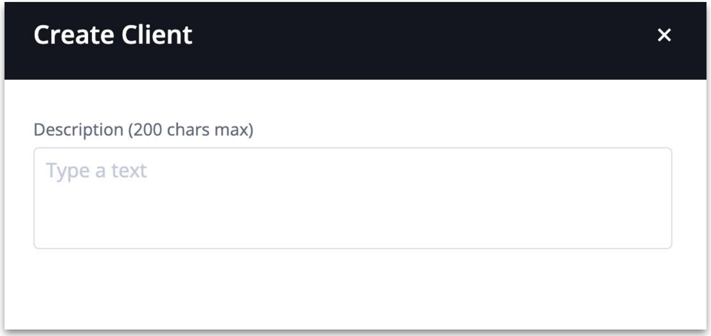
Existing clients will be listed, allowing you to toggle each item from active to inactive. You also have the option to delete the client by clicking on the trash can icon in the right hand column of the row.

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

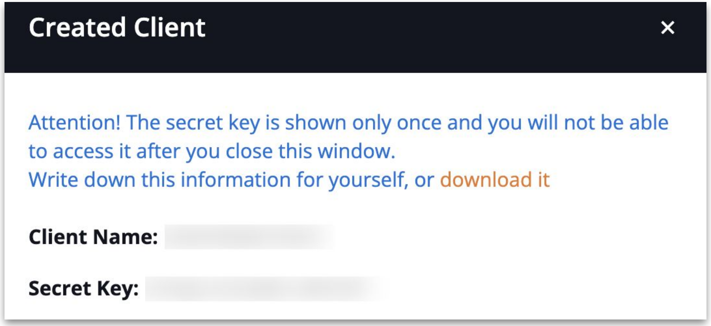


API Clients

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



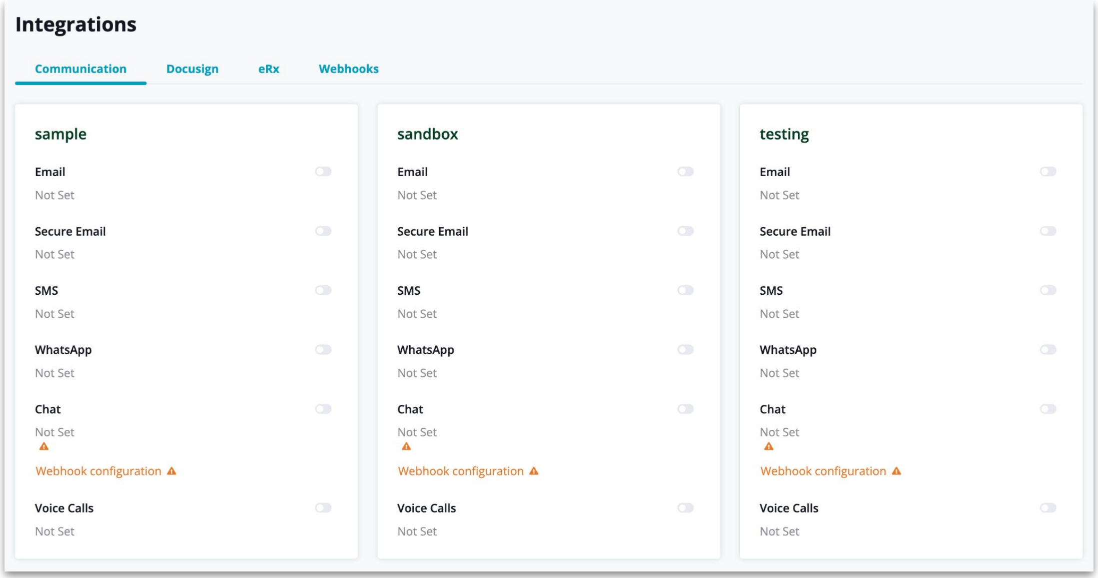
Upon clicking ‘Create’, you will be shown the Client Name and Secret Key. This will only be shown once. Click on the orange ‘Download It’ link within the message to download the information or store this information securely.



Integrations

The Integrations Screen allows you to configure:

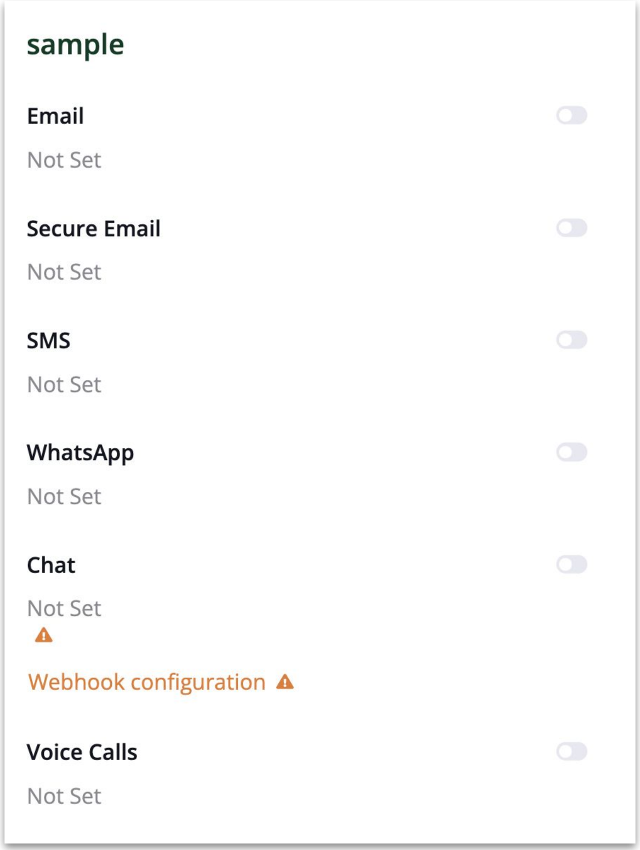
- Communications
- Docusign
- eRX
- Webhooks



Integrations

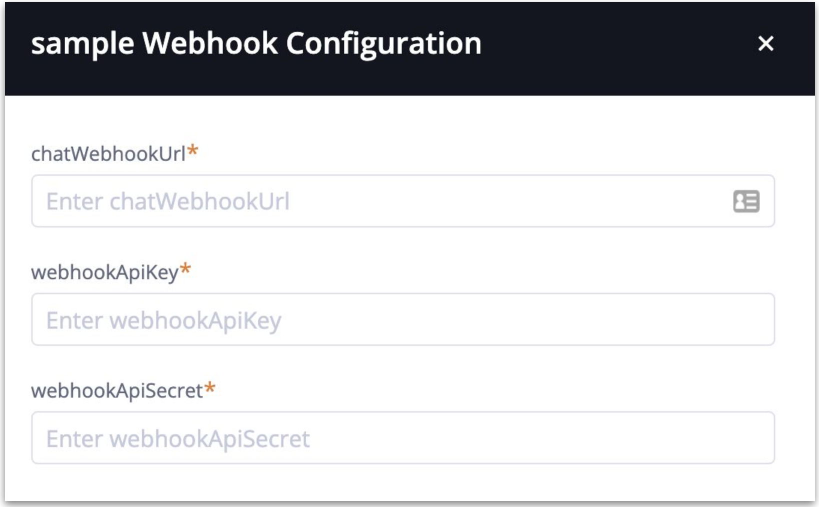
The Communications screen will allow you to activate the following communications integrations once they have been configured for your organization:

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



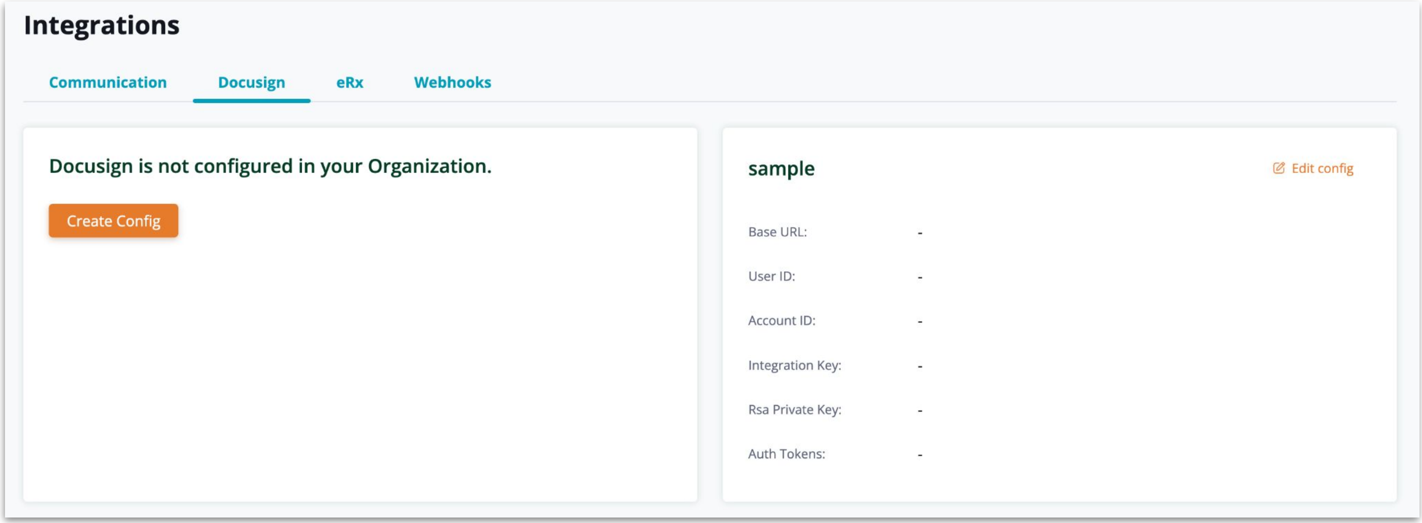
API Clients

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.



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.

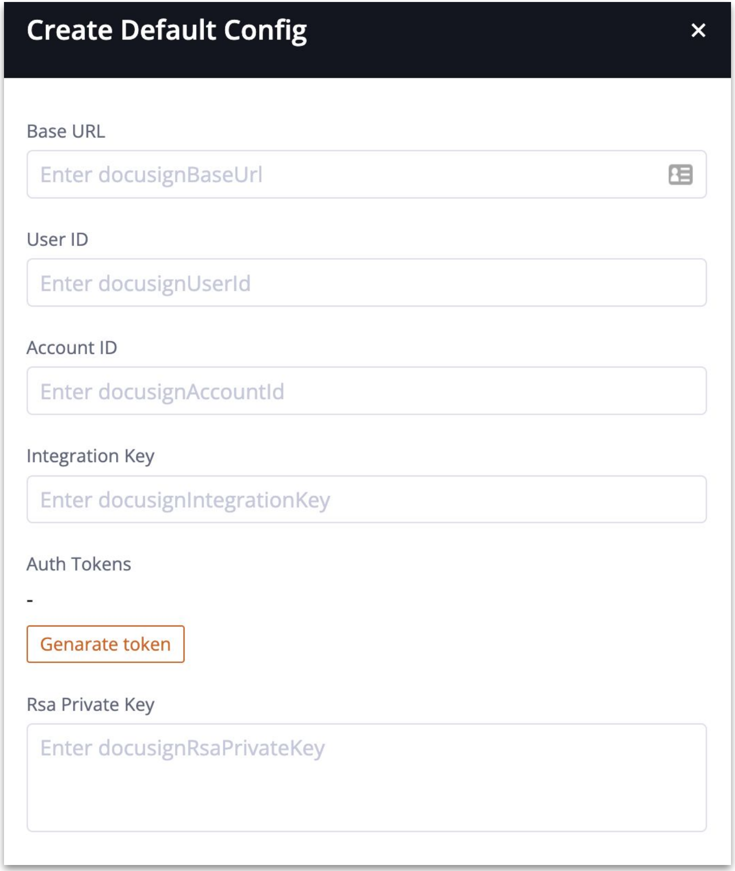


Integrations

Enter the following information from your Docusign account:

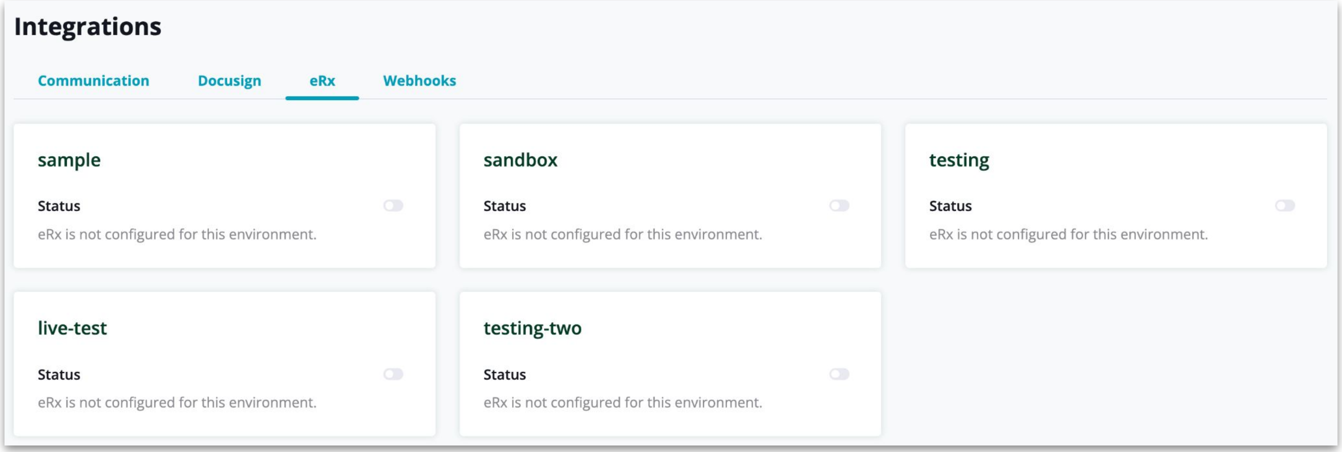
- Base URL
- User ID
- Account ID
- Integration Key
- Select ‘Generate Token’ to view token
- RSA Private Key (Enter the Docusign RSA Private Key)

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



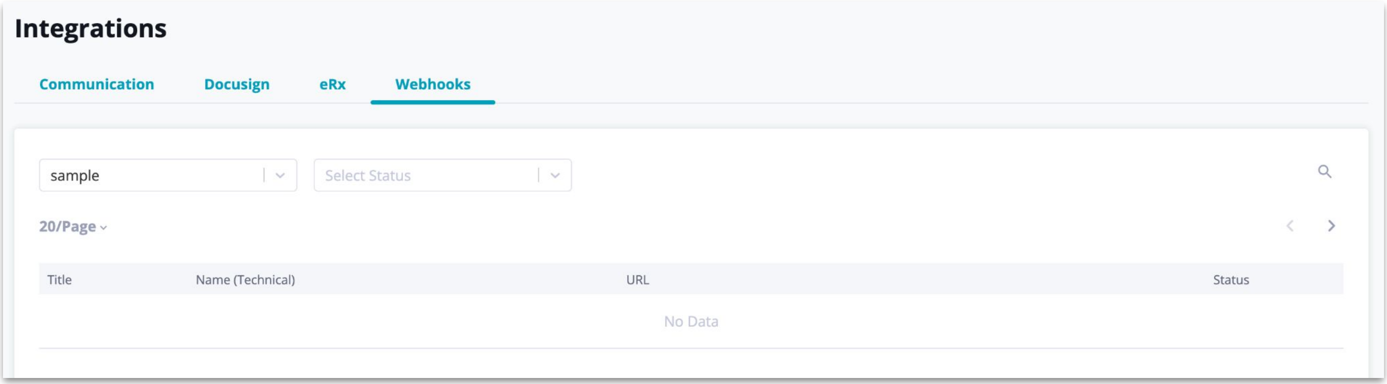
Integrations

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



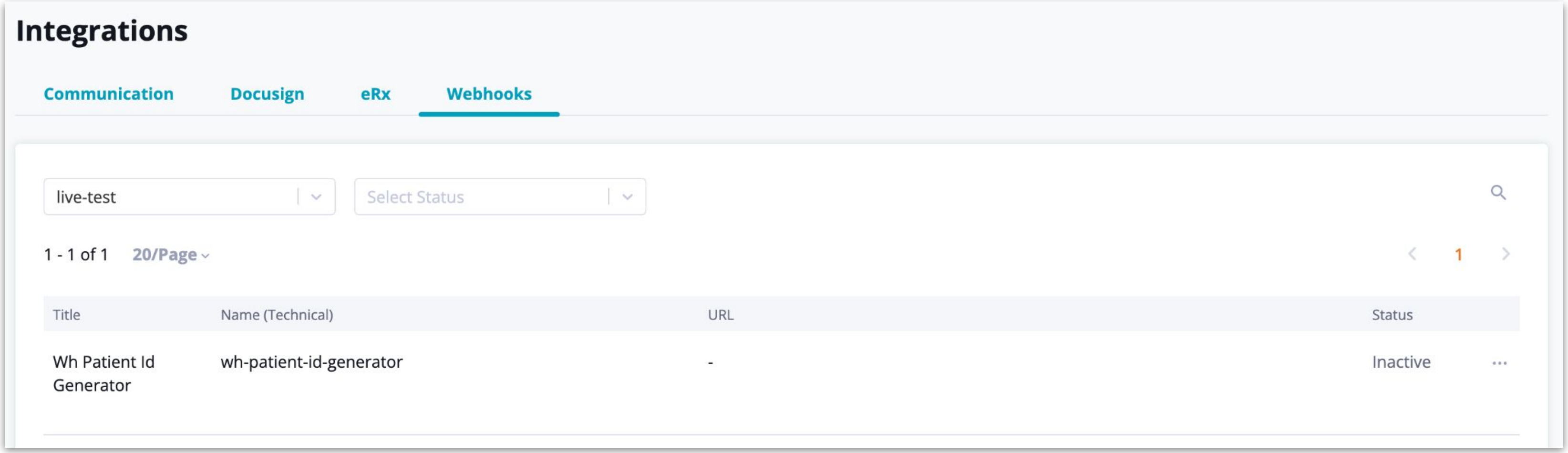
Integrations - Webhooks

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



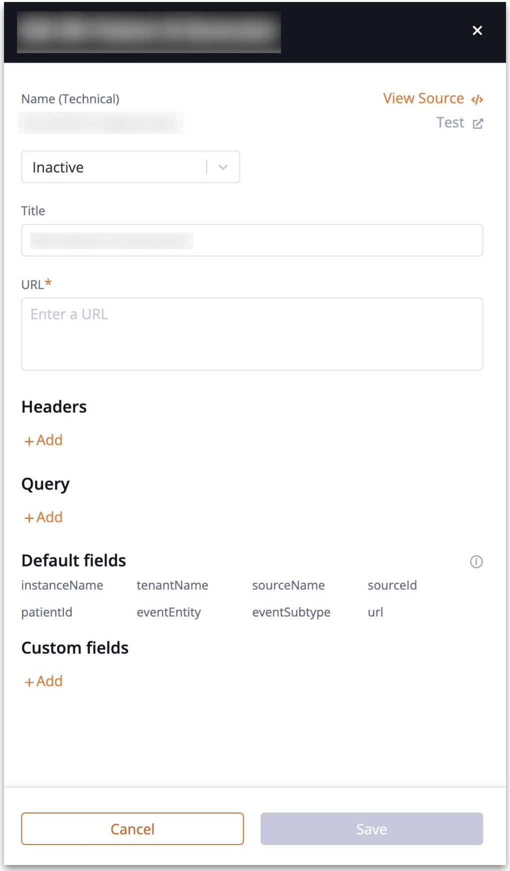
Integrations - Webhooks

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



Integrations - Webhooks

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



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Thank you!