Member Guide for HUB Phase I

What is HUB Phase I?

HUB will have several product releases, over time, designed to improve communication and work-flows for all parties engaged in the coordination of surgeries. Our future releases will focus in the areas of inventory management, product-use tracking, and payment processing between parties. The current release, Phase I, will allow for a basic functionality designed to serve as a base for future expansion. Our phase I functions consist of the following -

- Profile Creation
- Organization Set Up
- Groups
- Case Creation
- Document Management
- Member Collaboration

HUB can be used to coordinate and collaborate multiple components associated with surgical case management. Connect with others through this site to track, manage and communicate what is important to you. Please contact us with any suggestions you can come up with - your feedback is very important to our desire to create the tool you always dreamt of.

Organization

Organizations allow members within HUB to relate to each other within the traditional frameworks of a company, practice or hospital. Organizations have administrators who can customize the site to suit organization needs. These customizations include roles, visibility rules and fields.

The purpose of an organization

With an organization, you can establish roles and establish teams by adding members from within and outside of your company. Create hierarchies in order to control what information each team member sees. Organizations are perfect for connecting employees and contractors to a team, and coordinating information.

How to create an organization

Go to “My Profile” in the member menu. Click Create Company, and provide the necessary information to register your company. By default, you will be the administrator for the company you have created. If a company already exists, you can be invited to that organization by its administrator.

How to become your organizations’ administrator

If an organization was created for your company and you are not the administrator, you can contact us to request a change of administrator for your organization. Alternatively, the existing administrator can add administrator privileges to an invited member so he or she may act as an administrator within your organization.

Establishing Roles within the organization

Roles will allow you to determine visibility rules for information that is shared on the site. It is best to create roles based upon your workflows and the requirements of your organization. If your organization would like to determine visibility rules, then establishing roles will help you achieve this.

Creating a new role and adding a member to that role

Within your organization or company page, click Create New Role. Create a name for that role (Scheduler, Surgeon, Sales, Administrator, etc) and determine permissions or visibility rules you would like to assign. You have the ability to activate or deactivate any role at any time.

Groups

“Groups” is a collection of affiliated members who have been invited to connect on any subject. All members have the ability to create groups. With groups, members can communicate with other members within one forum, share information and upload documents.

Create A Group

Click Create New Group under group menu tab, enter your group’s name, give a description of your groups purpose, and send your invite to contact(s). As an option, you may add Tags; these are helpful when searching for groups.

Adding members to a group

Click Invite Members and type in their email address. The invited member will receive an email for them to accept this invitation. Once accepted, you can add this member to groups or roles.

Cases

A case is an object you can create and invite members of your network to join.

Create A Case — Step-by-Step

1. Click Create Case
2. Enter required information
3. Select/add member(s) by sending an invitation to join the case
4. Click Next
5. Review & Save

Member Access

Invited members can view or access information based upon restrictions made by the case manager.

How to update a case

Select case in calendar, click Edit. Once saved, members of the case will receive an update email to reflect the recent change(s).

Case Format

Hub provides a case template that can be edited by the administrator of an organization. The customization in Phase I allows for custom field creation to be applied to all cases that originate from members within the organization.

Understanding Custom Fields

Customize a case format by creating fields selective to your organization. In addition to the main case format, custom fields may be added/deleted to individual cases.

Customizing my organization’s case format

Simply go into Settings, click Custom Fields, make necessary edits to case format, and save.

Calendar

Within the case tab, you will be able to add and select cases for viewing and editing purposes. Your case calendar includes daily, weekly, and monthly viewing capabilities. Additionally, you can synch your HUB calendar with your Google calendar, allowing you to view cases on your mobile devices.

Calendar views

Your daily case list is visible in the case tab. Use the “calendar view” button to explore monthly and weekly viewing options. Add cases using the case tab provided at the top of the page.

Synching with Google

Connect with Google in your profile to allow calendar sync between HUB and Google. Cases will be forwarded to Google and will be visible on the devices that are connected to this same calendar.

Document management

You can add and share documents with other members in the document tab. This can be accomplished in different ways depending upon if you want to related this document to a case or a group forum. Here are your options

How to attach a document to a case

Create your case and use the “attach file” option within the case creation page. Alternatively, you can add a document after the case has been created in the dialogue box within the case object. The document will be visible and related to the case within the documents tab.

How to attach a document to a conversation

Access your network in the member menu. Select the group that you would like to work with and look for the paperclip icon next to the message box and add your file. Your file will also be visible in the documents tab.

How to add a file to the document library

1. Click “Add Files”
2. Select “Files” or “Folder”, depending on if you want to add a singular file or an entire folder with several files.
3. Select an object you would like to relate the file to. This object could be a case or a group discussion. If you do not want to relate a file to an object, simply click “X” to exit - your file will not be associated with a case or a group discussion. You have the option to relate it to an object at a later date by using the menu button next to the file.

How to delete and share documents

You can add, delete and forward documents in the documents tab. Once you see the documents listed, you can select the file you want to work with, and the options at your disposal will be available in the menu tab next to the file name.

How to assign visibility rules to documents being shared

You can assign visibility rules to determine who has access to your documents. This is accomplished by creating roles and assigning the members you are engaged with to the role that best suits their relationship with you. Within the role creation process, you can allow other members to have “full access” to your documents, "read only” or “no access”.

Members

How to add members to your network

Members can be added in the main menu drop down. Simply add their email address and click "send" once prompted. They will receive an email request to create their own account.

How to search for existing members

Use the search box at the top of the screen and type in their name.