

# Admin User Guide

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## TigerTouch/TigerTouch+

## Patient Settings



## DOCUMENT SCOP

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This document is written for TigerConnect users that have been granted the 'patient messaging admin' User Role in the TigerConnect to access **TigerTouch/TigerTouch+** Patient Settings. If you are an administrator of TigerConnect and would like further assistance, please contact TigerConnect Client Care (details below).

A login to TigerConnect for your organization is required and this document assumes that you have access to a computer with a current Web Browser (IE 11, Chrome, Firefox and Safari are supported) to access the TigerConnect Web Messenger or have downloaded the standalone TigerConnect Desktop Application.

This document does not cover any of messaging, audio and video calling features of the TigerConnect iOS and Android Mobile applications or the computer-based Web Messenger and Desktop Applications. Further, this Guide does not cover the administration of the TigerTouch & TigerTouch+ User and Organization settings covered in the **Web Messenger Administrator's Guide**. For additional resources, please reference our FAQs (<https://support.tigertext.com>), our Training Resources page (<https://www.tigerconnect.com/sitemap/training-resources>), or contact TigerConnect Client Care for further assistance or resources.

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This guide covers all of the features and functionality of the management of Patient and Primary Contact list for TigerConnect's **TigerTouch/TigerTouch+** features. For help with any questions regarding the features discussed below or the TigerConnect Web Messenger or Desktop Application please reach out to the TigerConnect Client Care Team and a member of the Client Care team will respond within 1 business day (30 minutes for Premium Support customers via phone):

**Email:**

- [prosupport@tigerconnect.com](mailto:prosupport@tigerconnect.com)

**Phone:**

- *Standard Support:* (650) 564-4722
- *TigerConnect Premium Support & TigerFlow customers:* Please call your organization's designated Toll-Free Number. Premium Support is available to your users 24 hours a day.

Our Standard Support Hours of operation are as follows:

- » *Monday - Friday, 5:30am – 5:30pm PST*
- » *Saturday and Sunday, 8:00am – 5:00pm PST*

Emergency Support is available for situations where the organization is experiencing a complete outage or a critical failure of TigerConnect is negatively affecting a significant number of end users. If you your organization is experiencing an event of this nature, please call **Emergency Phone Support** at **(650) 741-3555**.

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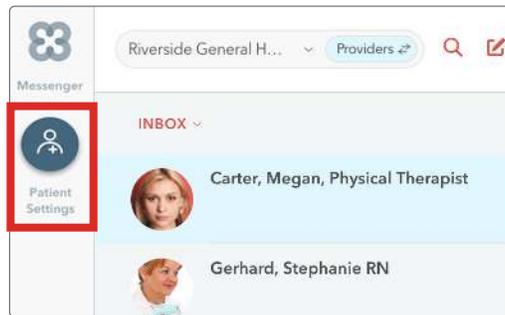
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To access TigerConnect from a computer simply navigate to the TigerConnect Web Messenger (<https://login.tigerconnect.com>) or download the TigerConnect Desktop App (<https://www.tigerconnect.com/download/>) and login with your TigerConnect Username and Password.

Once granted Patient Messaging Admin privileges by an Admin role user at your organization you can administer the Patient Settings section of TigerConnect. If you require access to manage your organization's Patient List, please contact the TigerConnect Administrator at your organization.

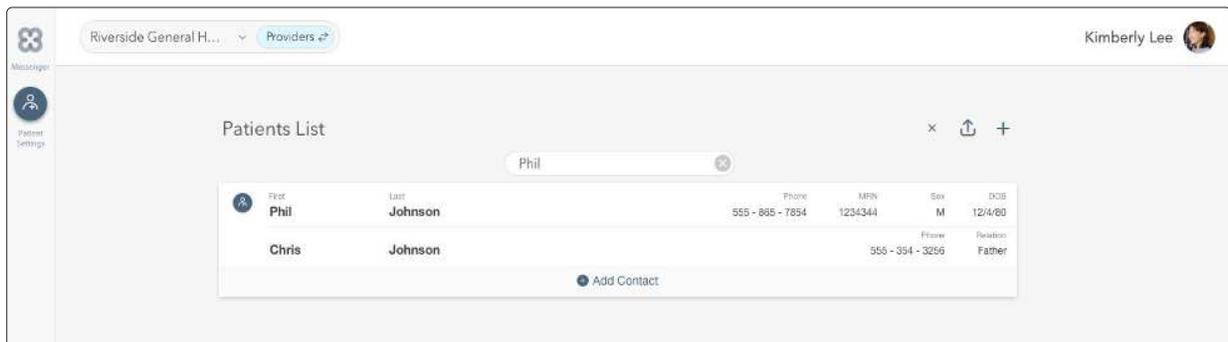
## ACCESSING TIGERCONNECT PATIENT SETTINGS

To access the TigerConnect Web Messenger's Patient Settings, once you have been provided with access by a TigerConnect Administrator at your organization (see Access - Enabling Patient Settings for a User above for enabling access as an 'admin' user). Once you have logged into your TigerConnect account on the Web Messenger or Desktop Application, simply click the **Patient Settings** button in the left sidebar of your TigerConnect Web Messenger or Desktop App:



You will be presented with your organization's **Patients List**. In the Patients List, you will see a list of any uploaded Patients and Primary Contacts. Currently you are unable to sort or filter the Patients List. Once you have populated Patients and Primary Contacts, to locate a specific contact within the Patients List, you can do the following:

1. Scroll through the existing list of patients/contacts (will continue to load as you scroll).
2. Click the search button at the top middle of the Patients List. You can search by **First Name, Last Name** and **MRN**. *NOTE: Currently, search will only occur on the Patient's Name.*



## ADDING PATIENTS AND PRIMARY CONTACTS

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### ADD/IMPORT USERS

TigerConnect provides multiple ways of uploading Patients and Primary Contacts into your organization's TigerConnect Patients List for **TigerTouch** and **TigerTouch+**. From the TigerConnect Web Messenger's Patient Settings section, Patient Messaging Admins can add individual contacts manually on a per user basis or upload users in bulk via a CSV file.

*NOTE: At this time, only two Primary Contacts can be associated to a Patient.*

**REQUIREMENT: In order for a Patient or Primary Contact to receive and respond to TigerTouch message and join a video call for TigerTouch+ from their Provider or Physician, the recipient's device must 1) be a smart mobile phone with calling capability, 2) able to receive SMS text messages, and 3) has an Internet browser that supports viewing mobile websites.**

**To add Patients and Primary Contacts to your to your organization:**

- » Adding Patients:
  - » Click **Patient Settings** (gear/sprocket icon) in the left sidebar of your Web Messenger screen.
  - » Click the '+' sign in the upper-right corner of the Patients List.
  - » Next, add the Patient's details (*All fields are required*):
    - » First Name
    - » Last Name
    - » Phone (*see requirements above before adding to ensure proper delivery of TigerTouch messages*)
    - » MRN (Medical Record Number)
    - » Sex
      - » Options: **M** (Male), **A** (Agender), **F** (Female), **N** (Non-binary), **O** (Other), and **U** (Unknown)
    - » DOB (Date of Birth)
- » Adding Primary Contacts (***note that all fields are required, but are not needed to add patient and can be left blank***):
  - » First Name
  - » Last Name
  - » Phone (*see requirements above before adding to ensure proper delivery of TigerTouch messages*)
  - » Relation
    - » Father, Mother, Sibling, Spouse, Guardian, Primary Care Physician, Emergency Contact, Caregiver, Other
- » Once all desired contacts are added, click **Save**.
- » Additionally, if you wish to quit Patient & Primary Contact creation, you can click **Cancel**.
- » If you do not see the contacts in your Patients List, **click the Reload button (arrow in a circular shape to the right of the Patients List heading)**.

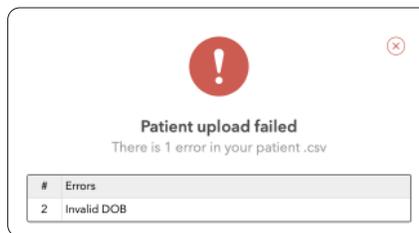
**NEXT: Bulk Importing Patients & Primary Contacts**

## Bulk Import Users

The TigerConnect Web Messenger's Patient Settings allows Patient administrators to upload user information in bulk. This requires a CSV (Comma-separated values) spreadsheet. Your CSV file should have the following formatted columns (in the order provided): MRN, First Name, Last Name, DOB, Sex, Mobile Phone Number, Contact 1 First Name, Contact 1 Last Name, Contact 1 Relation, Contact 1 Mobile Phone Number, Contact 2 First Name, Contact 2 Last Name, Contact 2 Relation, and Contact 2 Mobile Phone Number.

### FORMATTING NOTES:

1. **DOB formatting: YYYY-MM-DD.** You may wish to open the provided template with an application Windows' Notepad or macOS' TextEdit application to edit the CSV. Otherwise, you will need to manually format the column in the CSV file in your spreadsheet software so the Date (column D) has the formatting set to 'Text' as your software may automatically correct the YYYY-MM-DD format to an unsupported format. If improperly formatted you will be presented with the following error:



2. When entering a Patient's **Sex** and a Primary Contact's **Relation**, please refer to the options on Page 4 above for proper formatting and available options. The Patient Settings portal will provide you with the following error if you enter an unsupported Sex modifier or Relation:



### To import users in bulk:

- » Click **Patient Settings** in the left sidebar of your Web Messenger screen.
- » Click the **Upload button** in the upper-right corner of the Patients List.
- » Click the **Upload patients** button. You will be presented with your computer's respective file explorer.
- » Locate the appropriate CSV file from your computer's hard drive, Click **Save** (Windows) or **Choose** (Mac).
- » Once clicked, the file will automatically be uploaded.
- » When completed, a dialog appears to the right of the upload box that reports how many entries were successful and will provide you with any errors.
  - » If any upload errors occur, check to ensure that each column in the CSV file is formatted with the same headers listed above and abide by the formatting notes provided above.
- » If you do not see the contacts in your Patients List, **click the Reload button (arrow in a circular shape to the right of the Patients List heading).**

### NEXT: Editing Existing Patients and Primary Contacts

## EDITING EXISTING PATIENTS AND PRIMARY CONTACTS

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### EDITING PATIENT'S AND PRIMARY CONTACT'S RECORD

Once a Patient's record, along with up to two Primary Contacts, has been entered you are able to edit selected details for each type of entry. To edit a Patient or Primary Contact's record, simply place your mouse over the desired contact (the options **Edit** and **Delete** will appear) and click **Edit**. You are able to update the following information for each contact type:

#### Patients

- » First Name
- » Last Name
- » Phone (See Page 4 regarding specific requirements for phone number)
- » Sex
- » DOB (Date of Birth)

*NOTE: MRN cannot be changed. If the MRN needs to be updated simply delete the patient contact and re-create it with the corrected MRN and re-enter the user's Primary Contacts.*

#### Primary Contacts

- » First Name
- » Last Name
- » Phone (See Page 4 regarding specific requirements for phone number)
- » Relation

Once the record has been updated, click **Save** to complete the update. This will not affect any existing messages with a Patient or Primary contact. Any changes to First Name, Last Name, Sex, DOB, or a Primary Contact's Relation will immediately be reflected within any existing conversations after the change is saved.

### ADDING ADDITIONAL PRIMARY CONTACTS

Once a Patient's record has been created, if any remaining of the two provided Primary Contact slots have not been filled, simply click **Add Contact** at the bottom of the Patient's record. Similar to the initial addition process of adding a new patient record, the following fields are available:

- » First Name
- » Last Name
- » Phone (See Page 4 regarding specific requirements for phone number)
- » Relation

Once the Primary Contact's details have been added click **Save** to complete the addition.

### ***NEXT: Deleting Existing Patients and Primary Contacts***

## EDITING EXISTING PATIENTS AND PRIMARY CONTACTS (CONT.)

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### DELETING PATIENT AND PRIMARY CONTACT RECORDS

*NOTE: DELETING A PATIENT OR PRIMARY CONTACT RECORD IS PERMANENT. Deleting a Patient will delete the Primary Contacts associated with that Patient **as well as any conversations with either the Patient or their associated Primary Contacts.** Deleting a Primary Contact record will only delete the selected Primary Contact and any conversations your TigerConnect users have with that contact.*

*To delete a Patient's or Primary Contact's record, do the following:*

- » Place mouse over the desired Patient record, the options **Edit** and **Delete** will appear.
- » Click Delete.
- » Phone (See Page 4 regarding specific requirements for phone number)
- » Sex
- » DOB (Date of Birth)

*NOTE: MRN cannot be changed. If the MRN was entered incorrectly, simply delete the patient contact and re-create it with the updated MRN and re-enter the user's Primary Contacts.*

#### Primary Contacts

- » First Name
- » Last Name
- » Phone (See Page 4 regarding specific requirements for phone number)
- » Relation