

GUIDE

Clarus Dashboard

Welcome to Clarus, the easy-to-use call management solution for daytime and after-hours calls.

This guide is meant to serve as an introduction and instruction to using the Dashboard. We'll cover how to set the calendar, review all calls, track analytics, and more.

If you have any questions or desire further training resources, please contact our team at support@claruscare.com.

support@claruscare.com | 615.375.4500



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Your Settings

In your Settings section, the gear icon, you will see the basic overview of your practice information. Including:

- Practice Name
- Forwarding Number: the number your phones need to forward to in order to use Clarus
- Office Phone Number: your office's phone number
- Office Fax Number
- Fallback Notification Email & Phone Number: if a provider on call does not pick up after 3 attempts to reach, this person will be notified
- Timezone: based on your practice's location
- Address: physical practice location information

Settings: Clarus Orthopedics

Practice Name
Clarus Orthopedics

Forwarding Number
(615) 640-1175

Office Phone Number
+16153754500

Office Fax Number
Fax Number

Fallback Notification Email
jpatton@claruscare.com

Fallback Notification Phone Number
+16154281107

Timezone
America/New_York

Address

Street Address
615 M Street

Address Line 2
B19

City
Nashville

State Or Province
Tennessee

Country
US

Postal Code
37212

SAVE

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Switching Dashboards

In the instance you require access to multiple dashboards, can you access each without logging out.

Click your name in the top right hand corner, then select "Switch Partner". This will allow you to select a different dashboard to access from a dropdown menu.

The screenshot displays the Clarus Orthopedics dashboard. At the top right, a user profile dropdown menu is open for 'Kristen Rogers'. The menu includes options: 'Switch Partner' (highlighted with a blue box), 'Help', 'Webinar', and 'Sign out'. The dashboard itself shows a search bar, filters, and a list of records on the left. The main content area is divided into 'Overview' and 'Call Types' sections, each with a grid of metrics. The 'Overview' section shows 'Total Urgent' (0), 'Total Non Urgent' (1), and 'Total Pages' (0). The 'Call Types' section shows 'Appointments' (1), 'Prescription Refills' (0), and 'Medical Records' (0). The bottom of the dashboard features a list of records with details like names, dates, and times.

Section	Metric	Value
Overview	Total Urgent	0
	Total Non Urgent	1
	Total Pages	0
Call Types	Appointments	1
	Prescription Refills	0
	Medical Records	0

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Viewing Multiple Calendars

The Clarus platform allows for practices to have multiple call calendars to serve different call needs.

You can see all calendars by clicking on the lefthand navigation menu calendar icon.

This example shows a patient and hospital call calendar with a high level view of the next three days.

Clicking on the calendar's name will allow for edits and a more complete view of the month.

CALENDARS

- Overview
- Patient Call
- Hospital

CALENDARS

TODAY

CALENDARS	02/25/2021	02/26/2021	02/27/2021
PATIENT CALL	02/24 8 AM - 02/25 7 AM (P) Miller, A 02/25 7 AM - 02/26 8 AM (P) Crowton, S (S) Kim, J	02/25 7 AM - 02/26 8 AM (P) Crowton, S (S) Kim, J 8 AM - 5 PM (P) Pierce, J VIEW MORE	02/26 5 PM - 03/01 8 AM (P) Miller, A (S) Wright, S
HOSPITAL	02/24 7 AM - 02/25 8 AM (P) Pierce, J (S) Miller, A 02/25 8 AM - 02/26 8 AM (P) Kim, J	02/25 8 AM - 02/26 8 AM (P) Kim, J 8 AM - 5 PM (P) Crowton, S VIEW MORE	02/26 5 PM - 02/27 8 AM (P) Wright, S 02/27 8 AM - 03/01 8 AM All providers

This calendar is for example only, please be sure to set your calendar in accordance to the discussion during your onboarding call.

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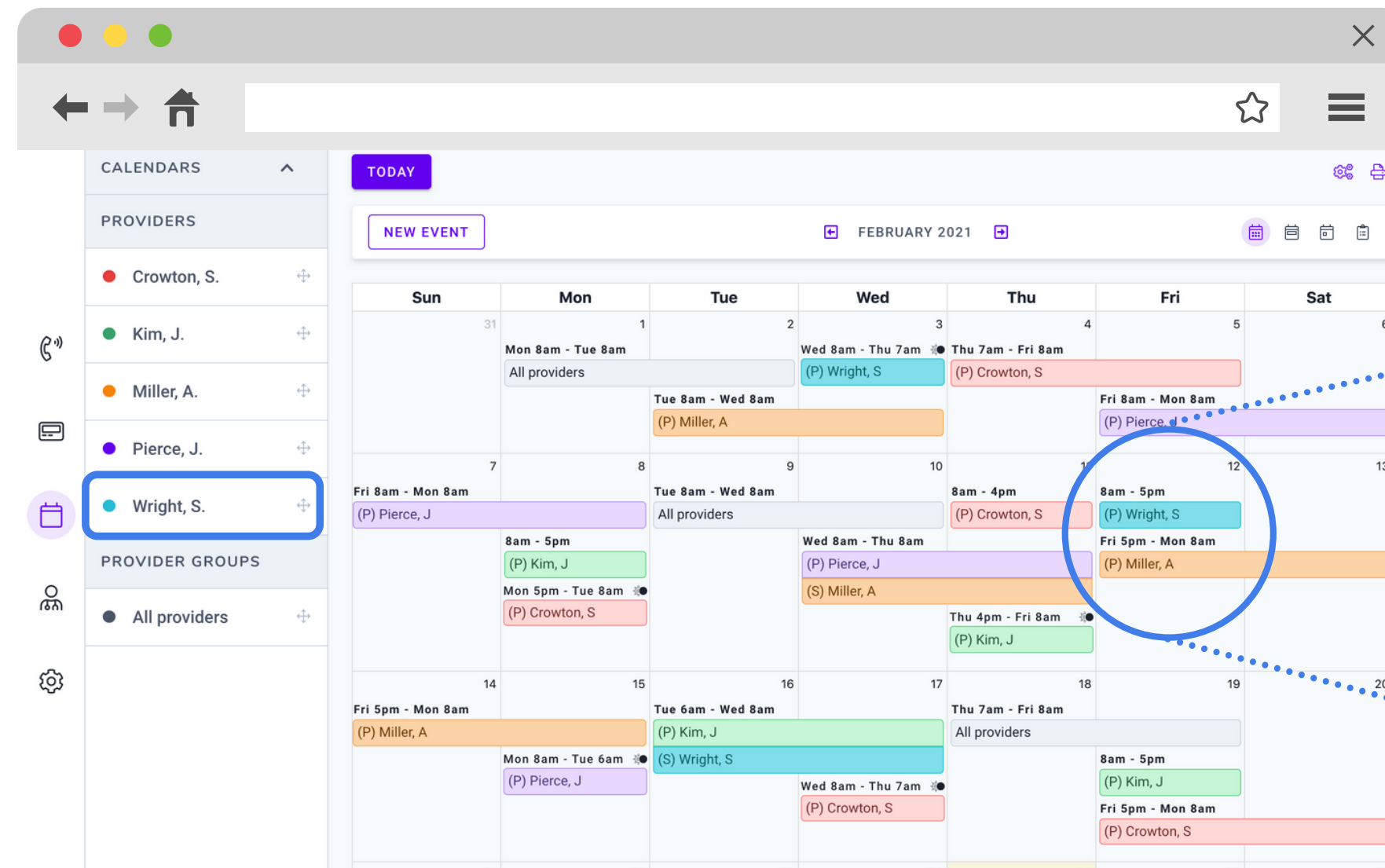
Setting Calendars

The coverage calendar can be set by dragging and dropping a provider from the lefthand side to a day on the calendar to set the schedule.

Make setting the calendar easier by copy and pasting events to multiple days. Right click on the event, choose copy, then double click on the day you desire to paste.

You can also utilize recurring events to streamline making the schedule.

Set your calendars months in advance to cut down on daily workload.



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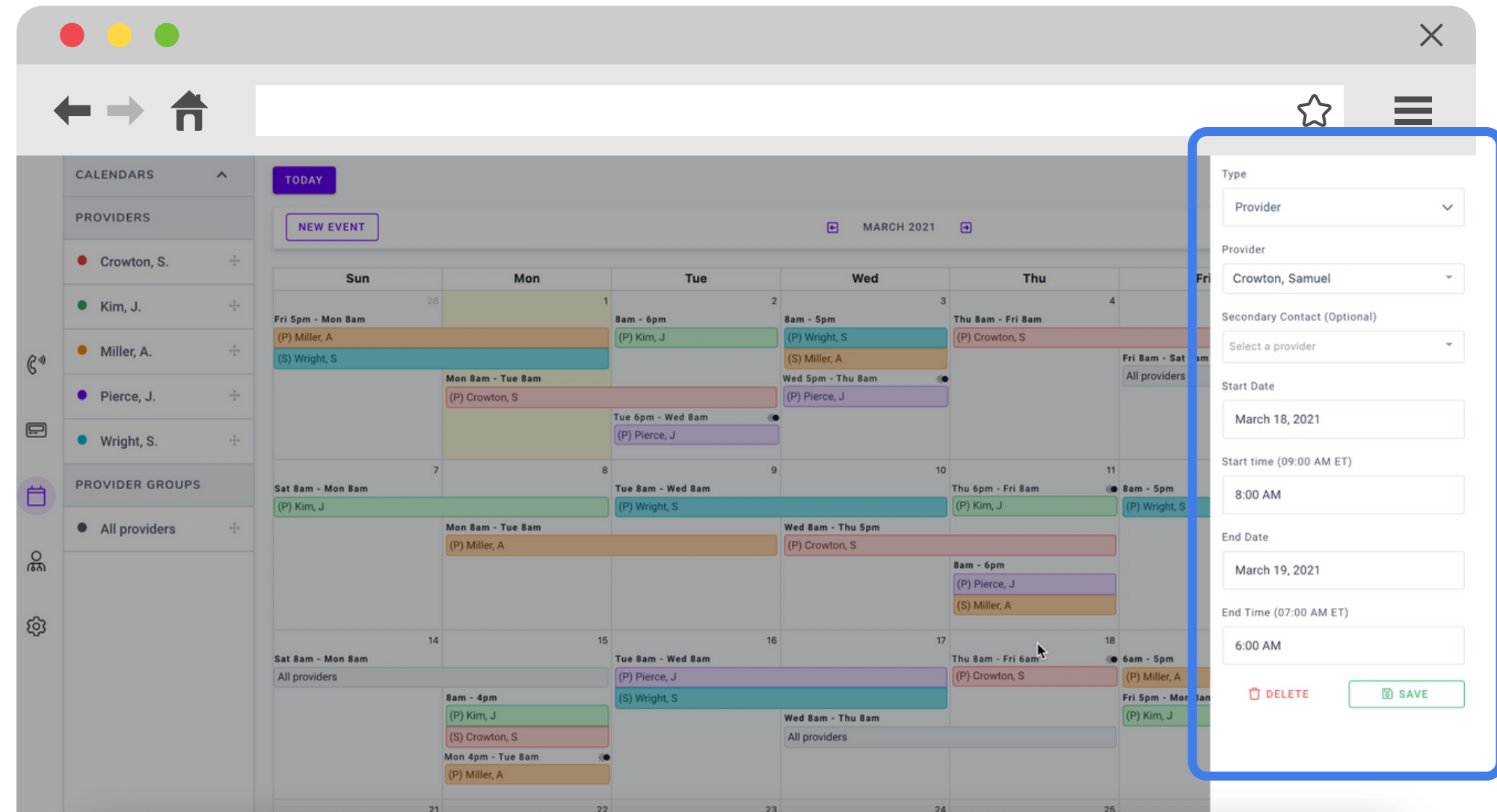
Editing Calendars

The calendar can be edited in real-time from any device with your login credentials.

The Clarus system will automatically route the call to the new provider selected on the calendar.

Click the provider's name on the date you want to make an edit. The edit menu on the righthand side will allow you to make changes to the:

- provider or secondary provider
- start date or time
- end date or time



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Reviewing All Call Activity

The first option on the lefthand side menu, phone icon, allows for all staff to review urgent and non-urgent calls, as well as the related activity.

Staff can sort through calls by:

- reason for call
- date of call
- primary provider
- or search for a specific patient

The screenshot displays the Clarus Orthopedics call activity dashboard. The left sidebar contains a list of calls, with the first option (phone icon) highlighted. The main area shows an overview of call activity, including a search bar, filters, and a list of call types. The call list on the left includes entries for Adam Reece, Frank Ferrell, Daniel Ledet, and Jeff Kaufman, each with their date of birth, phone number, and call time. The overview section on the right provides a summary of call statistics, such as Total Urgent, Total Non Urgent, Total Pages, Appointments, Prescription Refills, Medical Records, Billing, and Messages for the Nurse.

Call Type	Count	Status
Total Urgent	2	Incomplete Calls
Total Non Urgent	6	Incomplete Calls
Total Pages	0	Incomplete Pages
Appointments	3	Incomplete Calls
Prescription Refills	1	Incomplete Calls
Medical Records	0	Incomplete Calls
Billing	1	Incomplete Calls
Messages for the Nurse	1	Incomplete Calls

This is for example only, your calls will be sorted in accordance with the custom options chosen by your practice during onboarding.

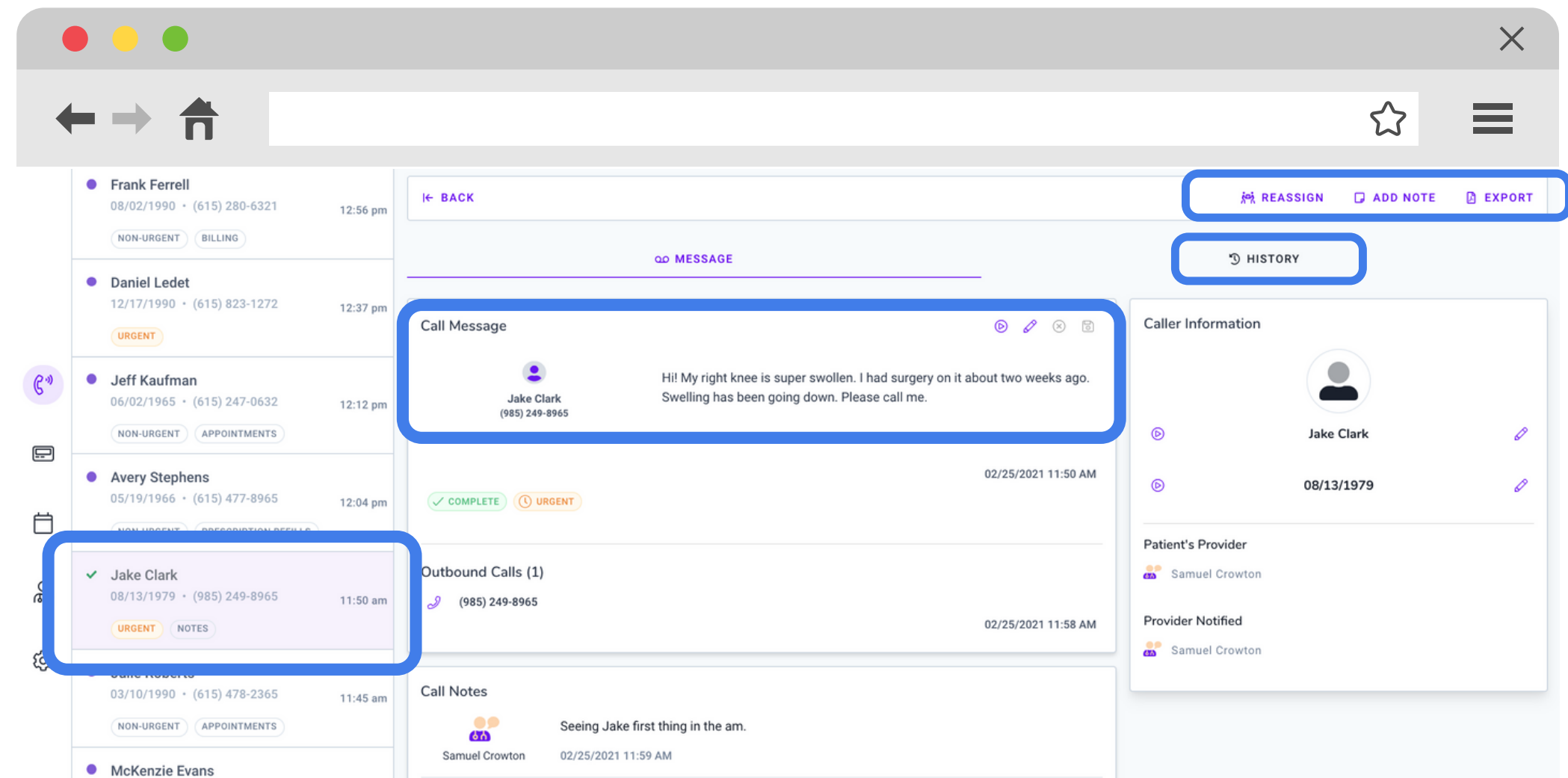
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View Call Record

Clicking into a specific call record allows you to view the patient information and message.

From the call record, staff can:

- add notes for all to see
- mark as complete or reassign
- view history
- export record



This is for example only, patient record is not actual patient information.

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Call History

By clicking the History tab on the Call Record, staff will be able to:

- view all call activity
- see time of all activity
- view which provider or staff member took what action

The screenshot displays the Clarus Call History interface. On the left, a sidebar contains icons for various functions: a phone, a calendar, a person, and a gear. The main area is divided into three sections. The top section shows a list of call records for a patient named Ella Robinson (08/10/1990, (617) 584-2356). The records are filtered by 'URGENT' and 'FALLBACK' status. The middle section shows a list of call records for a patient named Sam Johnson (08/06/1969, (615) 456-3289). The records are filtered by 'NON-URGENT', 'BILLING', and 'NOTES' status. The bottom section shows a list of call records for a patient named Corrie Burns (10/29/2000, (615) 236-5289). The records are filtered by 'URGENT' status. The right section shows a detailed call history for a patient named Josh Harrison (01/01/1990, (615) 236-9874). The call history includes a list of call events with timestamps and descriptions, such as 'Call initiated', 'Notification 1 sent to Samuel Crowton', 'Samuel Crowton added note: "Kristen, please schedule a follow up appointment for Josh."', 'Samuel Crowton attempted callback to +16152369874', 'Response call failed. Please check the callback number.', 'Samuel Crowton completed the call', 'Kristen Rogers added note: "Follow up appointment has been scheduled for 3/1"', and 'Samuel Crowton archived call'. The right sidebar contains 'Caller Information' for Josh Harrison, 'Patient's Provider' (Samuel Crowton), and 'Provider Notified' (Samuel Crowton).

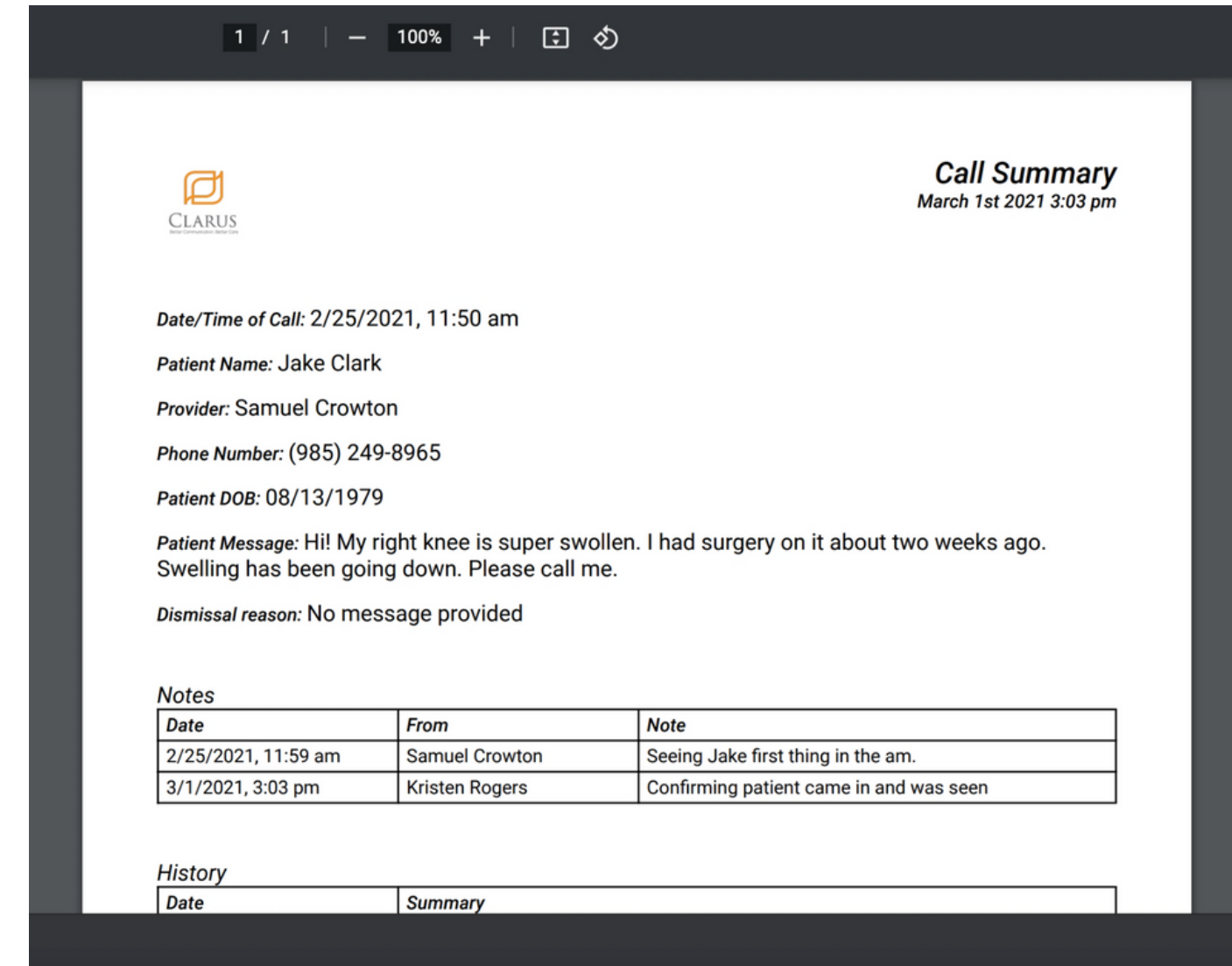
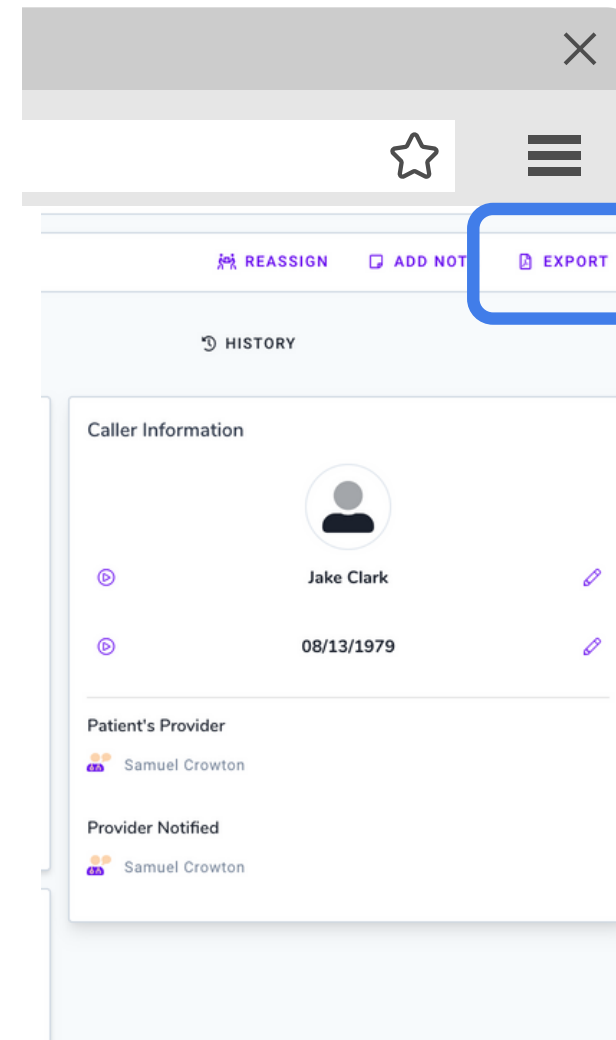
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Exporting Call History

In the righthand corner of a Call Record, you will see an export option. Pressing the export button generates a PDF call summary.

This PDF can easily be printed and shared or digitally uploaded to patient records.



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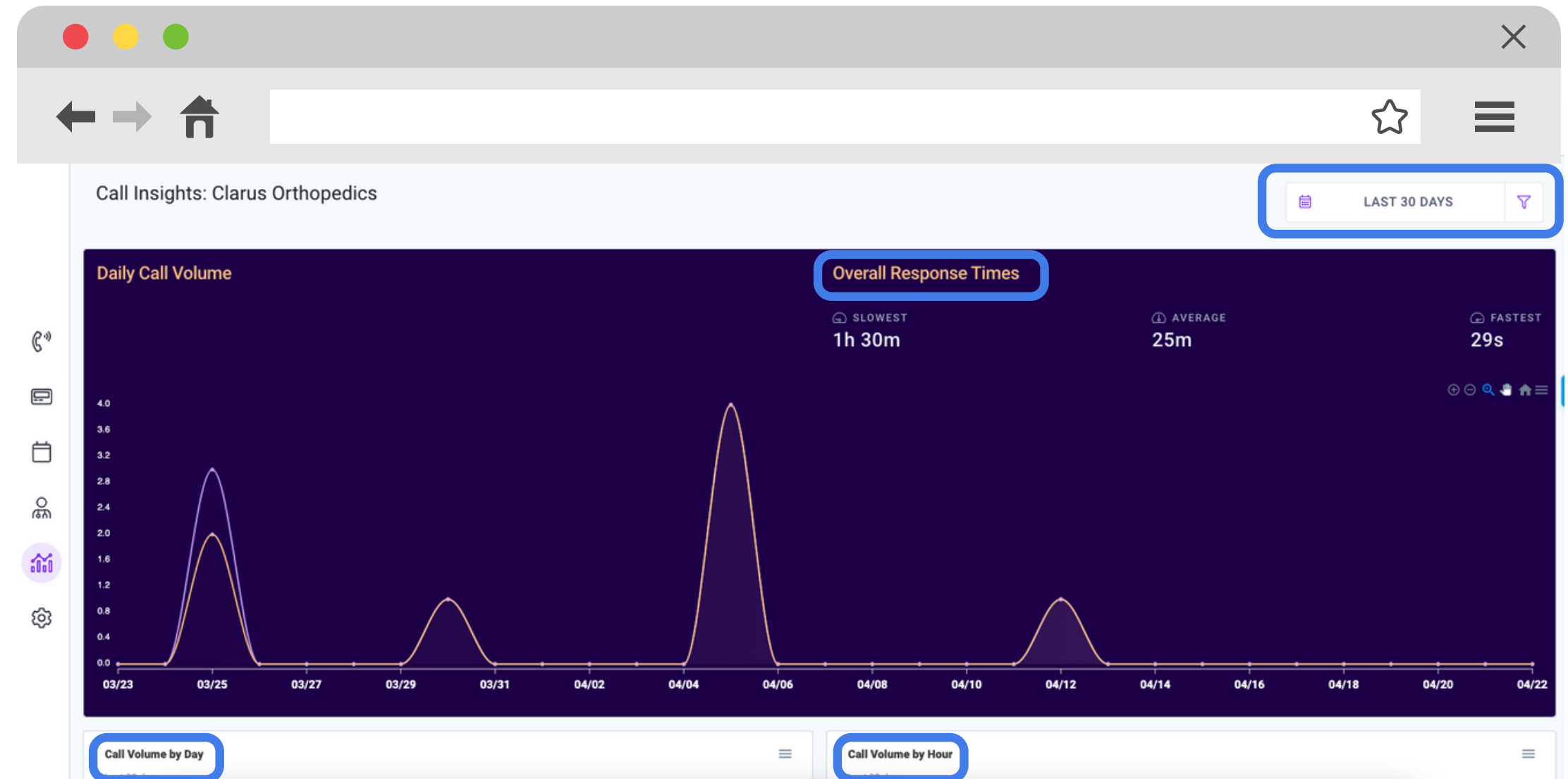
Call Insights

The Call Insights tab, graph icon, allows dashboard users to track call volumes and response times.

The default filter is the last 30 days, but can be customized to the viewer's preference.

The insights include:

- volume of calls by day
- volume of calls by hours
- volume of calls by type
- volume of calls by provider
- number of calls completed by each provider
- number of calls that went to fallback by provider
- slowest, fastest, and average response times by your practice



This is for example only, data is not from a real practice.

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Paging

If your practice has opted to use the Paging add on, clicking on the pager icon will allow you to create, send, and track page progress.

Send a page in 4 simple steps:

1. Create a new page by clicking the "+" button
2. Select the provider from the drop down menu
3. Fill out the patient's name, message, and DOB
4. Press send

Clarus Orthopedics

Filters: PROVIDERS 0 / 0 records

Select provider to notify: Crowton, Samuel

Callback Number: 985-249-1363

Patient Name: Jake Clark

Patient Message: Patient is in room 208A waiting to be seen

Patient DOB (Optional): 08/13/1979

SEND

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