



# Vocera Edge Communications Application User Guide (iOS)

Vocera Edge Communications redefines how caregivers communicate with the first smart, unified, and connected collaboration experience designed with you in mind. A fully integrated mobile solution, Vocera Edge Communications delivers secure messaging, voice, and clinical context to enable true collaboration versus fragmented communications.

This user guide will walk you through the basics of how Vocera Edge Communications helps you facilitate communications so you can spend more time on taking care of patients.

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PatientSafe Solutions has been acquired by Vocera Communications, Inc.. In this process, PatientTouch Communications is being renamed Vocera Edge Communications. As part of rebranding, in all related documentation customers will see Vocera Edge in some places and PatientTouch in others. We are in the process of converting all our documentation and appreciate your patience.

# Getting Started

PatientTouch Communications allows you to log into the application using one of the following methods: SAML Integration, Touch ID, Face ID, or username and password. Each of these methods are described in this topic and the next several topics.

## Security Assertion Mark Up Language (SAML) Integration

SAML Integration is for hospitals that want to use a third party Multi-Factor Authentication (MFA) system to ensure a safer and more secure log in. SAML Integration may be used by internal hospital employees (Internal Users), or, users external to the hospital network (External Users).



**Users with SAML Integration configured will *not* be able to log in with Touch ID or Face ID. However, when the application moves to Security Mode, users will be able to re-authenticate back into the application using Biometric Authentication.**



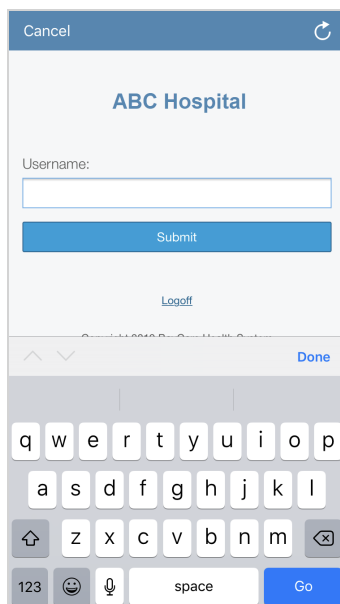
**SAML Integration can be enabled/disabled globally in Enterprise Manager once initially configured.**

Please follow the instructions below to log in using SAML Integration.

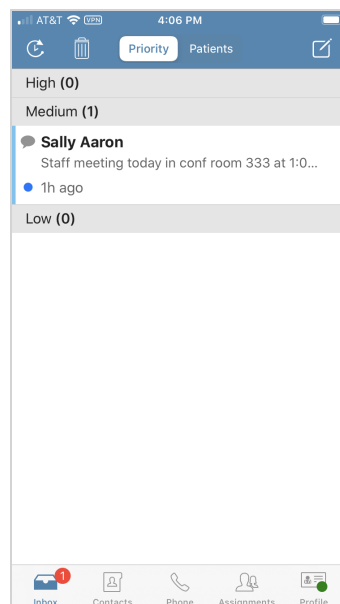
## External Users

Users who are on a non-hospital owned device or are outside of the hospital's internal network, will see a customized MFA/SAML login screen asking for your log in information. Depending on the application selected by each hospital, these screens will vary in appearance and functionality.

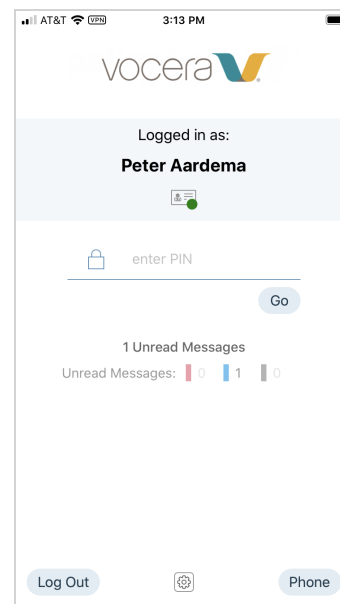
A sample screen is provided below. External users would enter their username and password to get access to PatientTouch. And some facilities may ask for an additional multi-factor authentication code.



1. Depending on the hospital's security policy, each



3. Upon logging in, the **Inbox** automatically displays with all



4. Enter your password, PIN, or use Biometric Authentication



MFL/SAML login screen will differ.

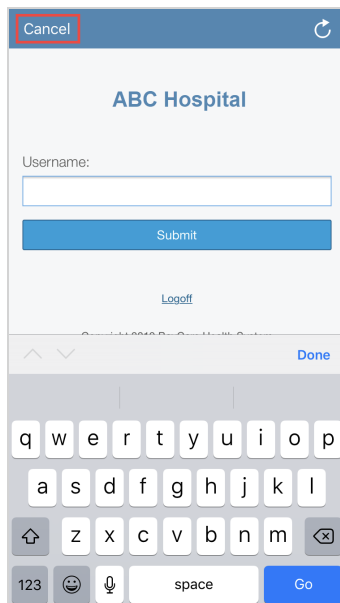
2. You may be asked to enter your username, password, and/or an additional login code.

of your important messages.

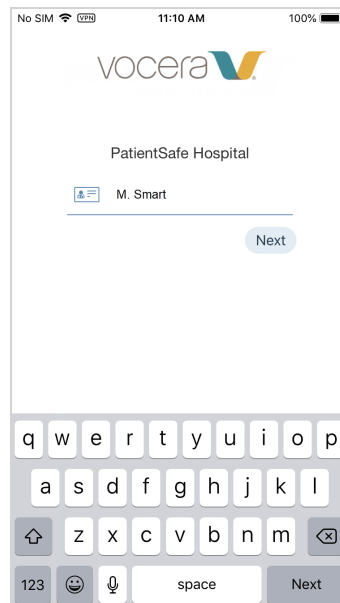
to reauthenticate when in **Security Mode**.

## Internal Users

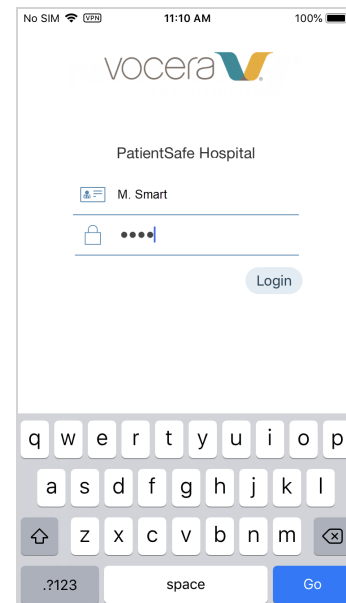
If users are internal to the hospital network or are using a hospital shared device, they will need to touch **Cancel** on the MFA/SAML screen to access the PatientTouch log in screen.



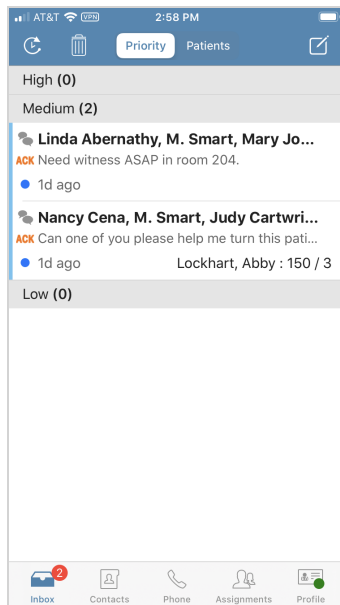
1. Touch **Cancel** on the MFA/SAML screen to access PatientTouch.



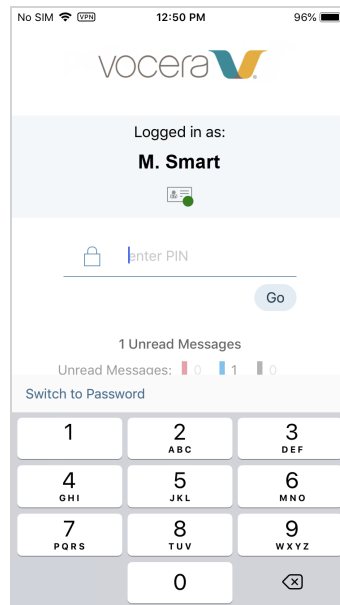
2. On the PatientTouch Login screen, enter your username and touch **Next**.



3. Enter your password and touch **Login**.



4. The **Inbox** automatically displays with all of your important messages.



5. Enter your password, PIN, or use Biometric Authentication to reauthenticate when in **Security Mode**.

## Log in by Touch ID



**Notice for SAML Integration users, if you have configured Touch ID on your device and you login to PatientTouch Communications using SAML integration, you will only be able to use Touch ID to reauthenticate.**

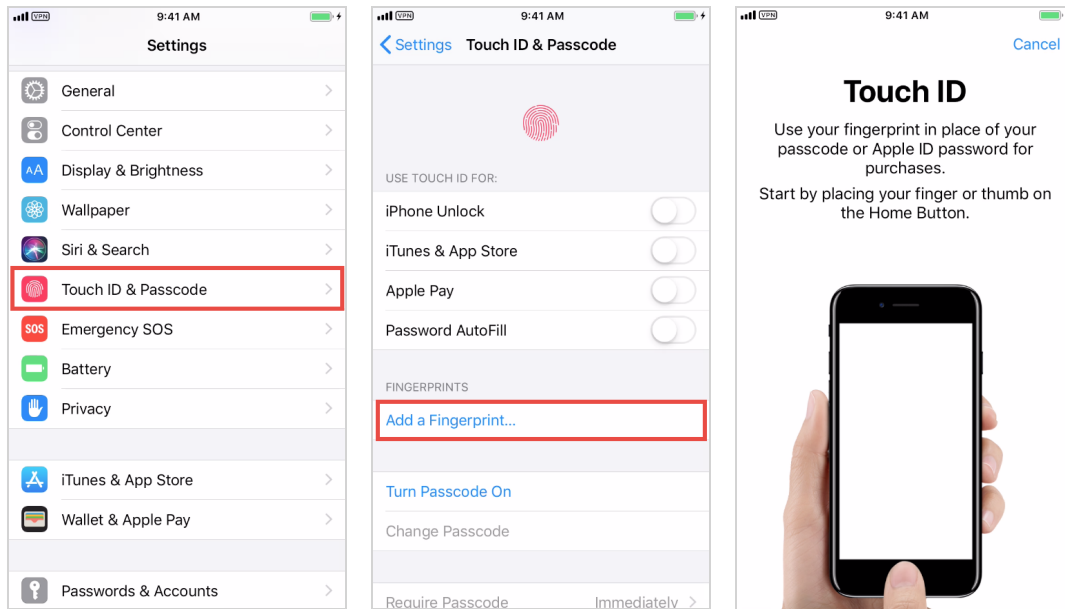
PatientTouch Communications provides Biometric Authentication as an option to log into the application.

- iPhone 6, 7, 8 supports Touch ID
- iPhone X supports Face ID

Users must have Touch ID configured on their device to use this feature. Please use the instructions below to add a fingerprint and login with Touch ID.



**You will need your Apple ID to complete the fingerprint sign in process.**



1. On your iPhone, select: **Settings> Touch ID & Passcode.**

2. Select **Add a Fingerprint.**

3. Place your finger/thumb on the **Home** button, repeating as the instructions allow.

4. Follow all prompts (including the ones to enter a passcode).

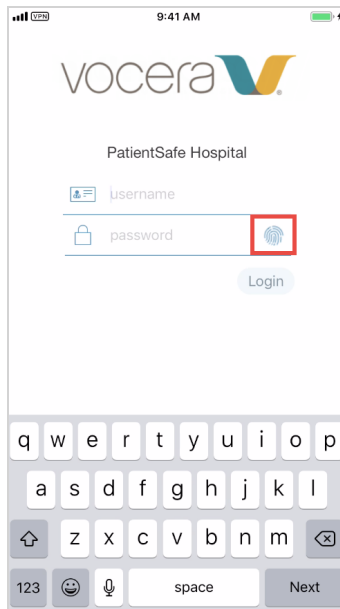
5. You will also need to enter your Apple ID password.

After setting up your fingerprint profile, navigate to the PatientTouch Communications log in screen. You should see a blue thumbprint in the password line.

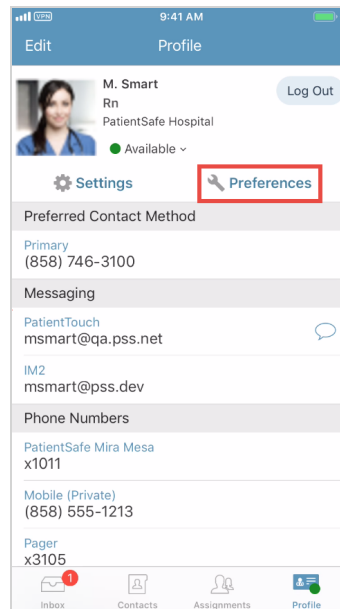


**If you do not see a thumbprint on the password line, your facility may not have this feature enabled.**





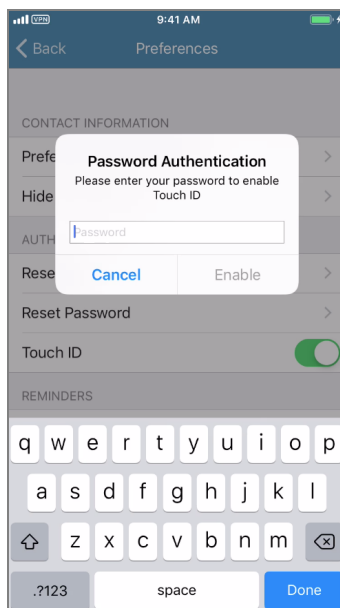
6. Log into PatientTouch Communications with your username and password.



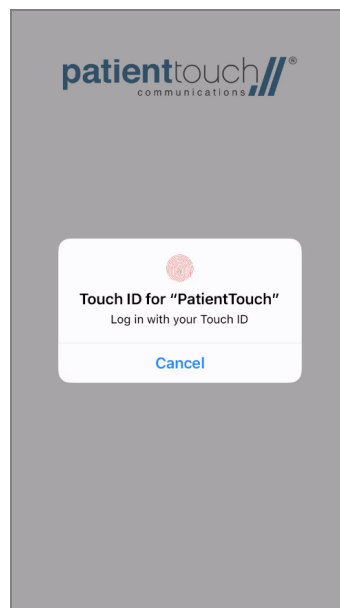
7. Navigate to the **Profile** tab and touch **Preferences**.



8. Select **Touch ID**.

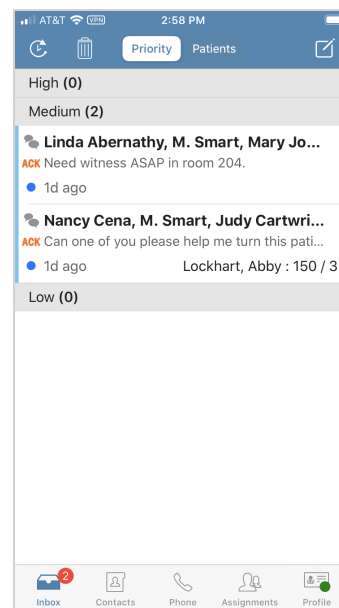


9. Enter your PatientTouch password to enable **Touch ID**.



10. An alert displays, asking you to use **Touch ID**.

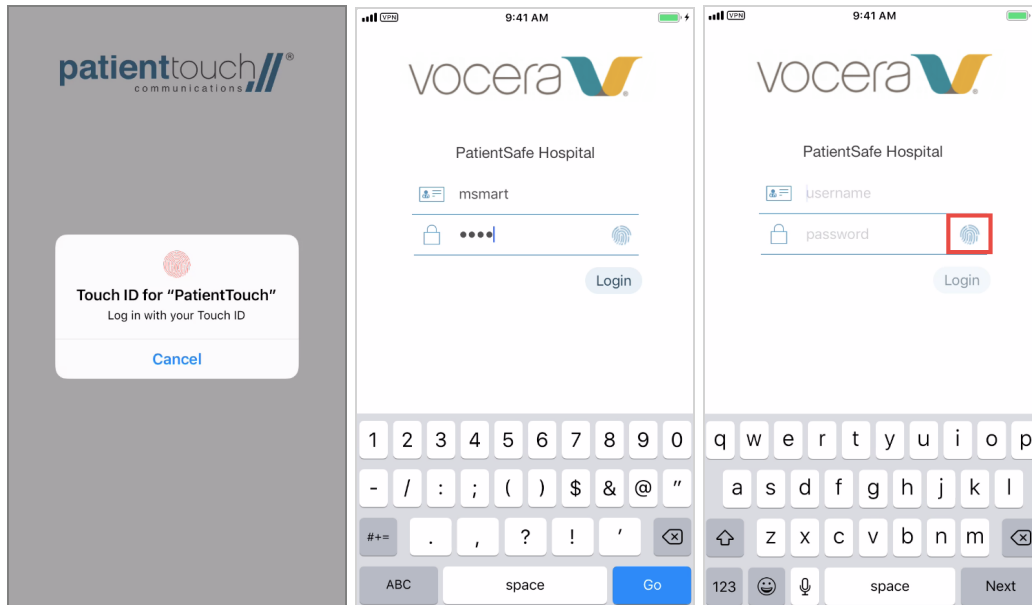
11. Press your finger/thumb on the **Home** button of your device.



12. You automatically advance to the PatientTouch Communications Inbox.

## How to Login with User Name and Password

For users who do **not** want to login using Touch ID, please use the instructions below.



1. Touch **Cancel** on the Touch ID Sign In alert to log in with your user name and password.
2. Enter your username and password.
3. Touch **Login**.
4. Or, if you change your mind and want to use Touch ID, touch the fingerprint icon to bring up the alert and log in with **Touch ID**.

## Log in by Face ID



**Notice for SAML Integration users, if you have configured Face ID on your device and you login to PatientTouch Communications using SAML integration, you will only be able to use Face ID to reauthenticate.**

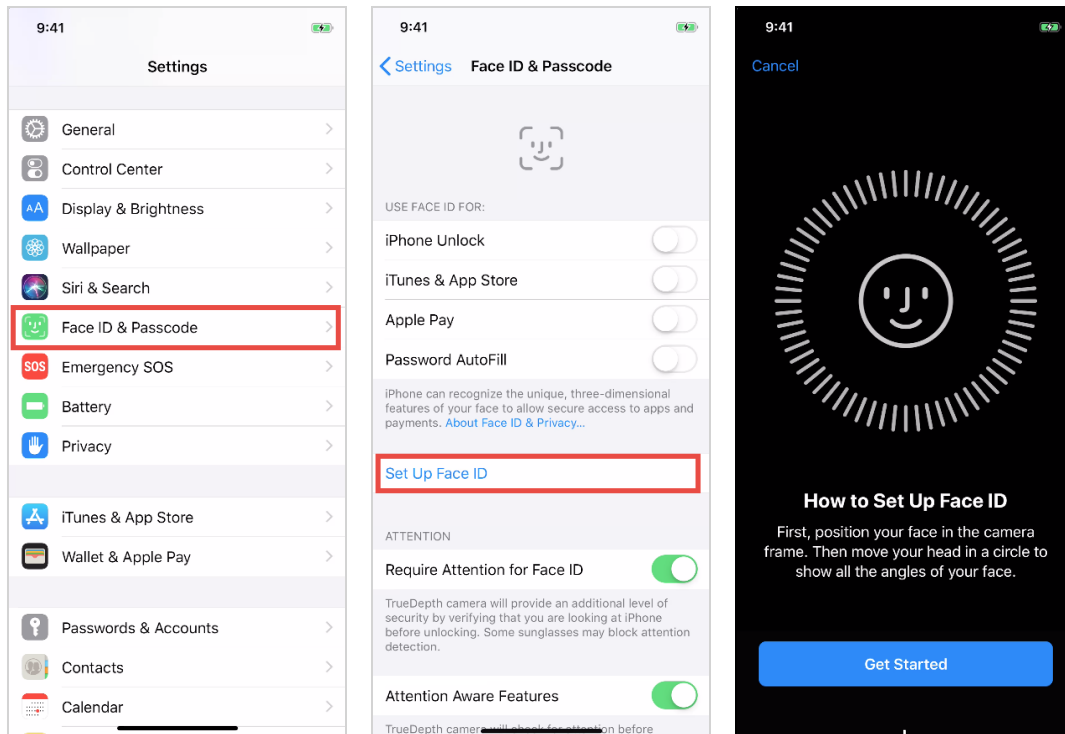
PatientTouch Communications provides Biometric Authentication as an option to log into the application.

- iPhone 6, 7, 8 supports Touch ID
- iPhone X supports Face ID

Users must have Face ID configured on their device to use this feature. Use the instructions below to add Face ID.



**You will need your Apple ID to complete the fingerprint sign in process.**



1. In your device Settings, select:

**Face ID & Passcode.**

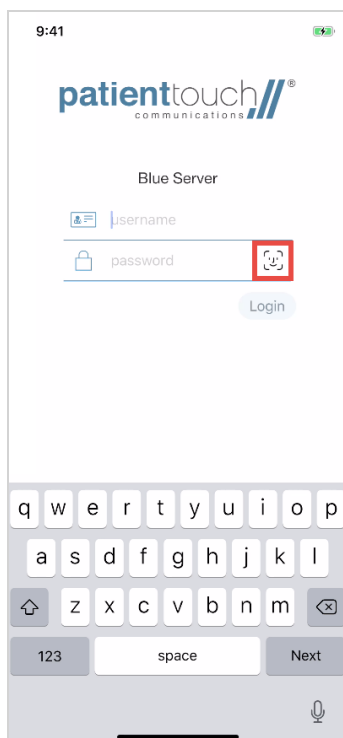
2. Select **Set Up Face ID.**

3. Place your face in the camera frame, repeating as the instructions allow, and follow the prompts.

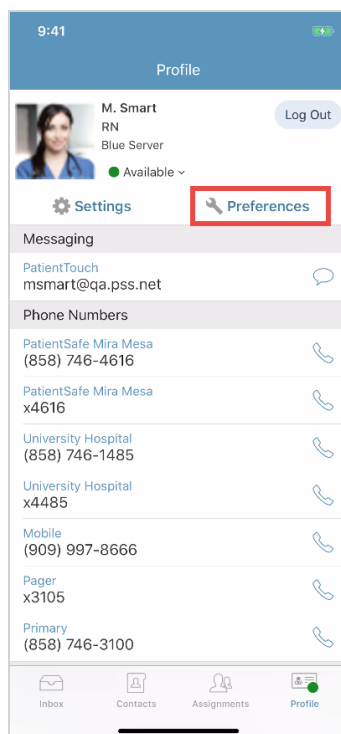
After setting up your Face ID, navigate to the PatientTouch Communications log in screen. You should see a small "face" in the password line.



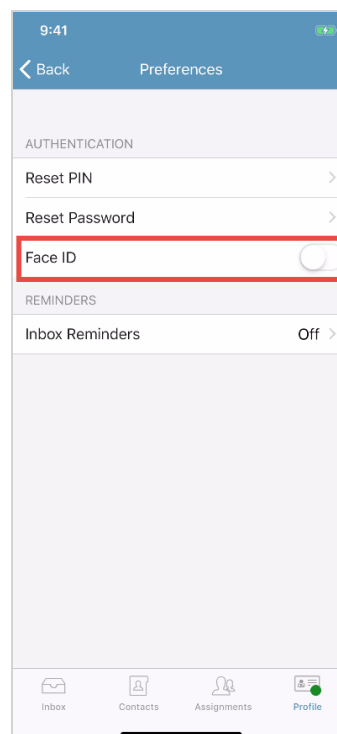
**If you do not see a small "face" on the password line, your facility may not have this feature enabled.**



4. Log into PatientTouch Communications with your username and password.

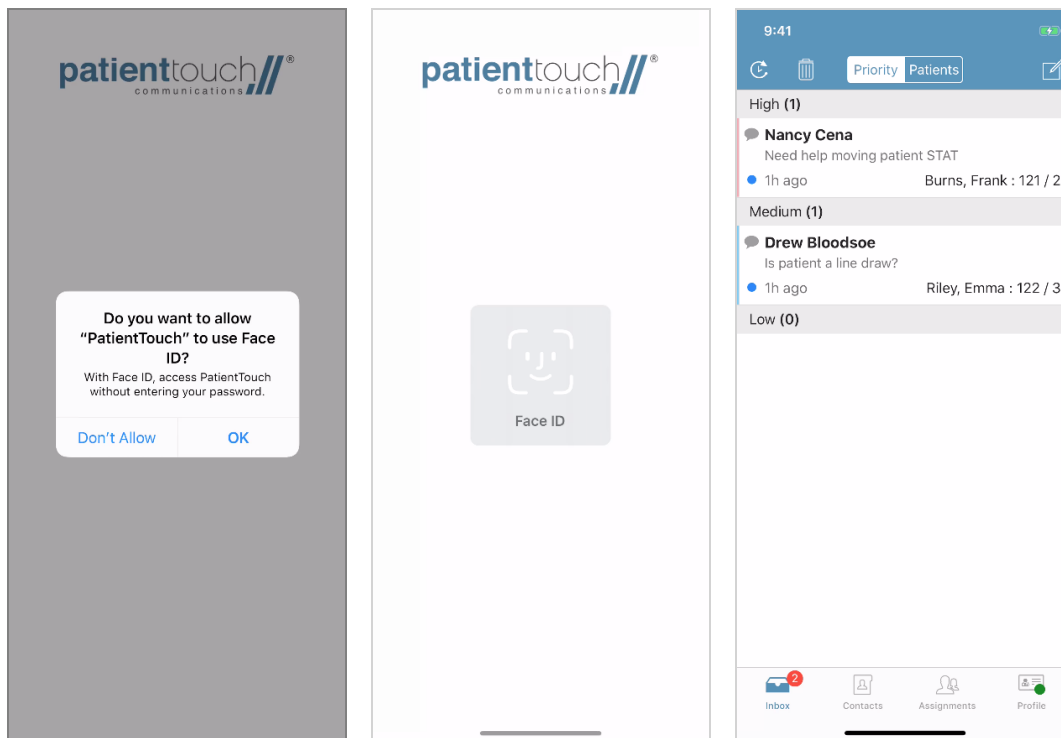


5. Navigate to your profile and touch **Preferences**.



6. Select **Face ID** and enter your password to enable the process.

## Login with Face ID Sign In



1. Upon first launching the application with Face ID enabled, a message displays asking if you want to allow PatientTouch to use Face ID.

2. Touch **OK**.

3. Place your face in front of the camera and wait for PatientTouch Communications to log you in.

4. You automatically advance to the PatientTouch Communications Inbox.

## Single Sign On (SSO)

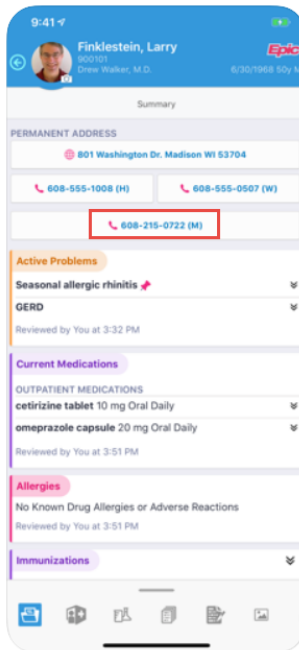
### Epic

In order to work more closely with third party applications, users can now seamlessly link from a third party application (e.g. Rover or Haiku) to the Vocera Edge application without having to reauthenticate. For example, caregivers can log into Rover using valid credentials, click a Vocera Edge link, i.e. a phone number in the Rover app, and automatically navigate to the phone tab of Vocera Edge.

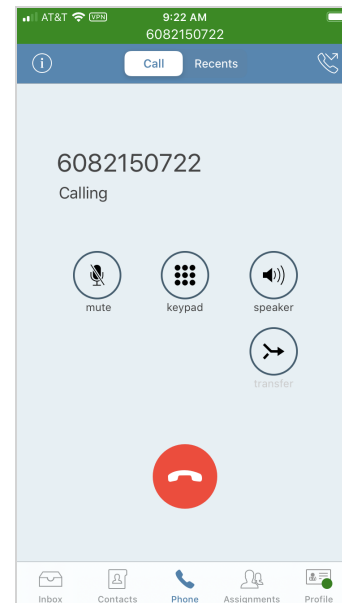
The images below are an example of the process between the two applications. Users will also be able to access the Vocera Edge application on the contacts and patients screens.



1. Log into an Epic device with valid Epic credentials.



2. Click a Vocera Edge link, i.e. phone number, in the Epic device.



3. Automatically navigate to the phone tab of Vocera Edge Communications and wait for the recipient to pick up the call.

**Note:** Vocera Edge automatically opens; users bypass the security screen.

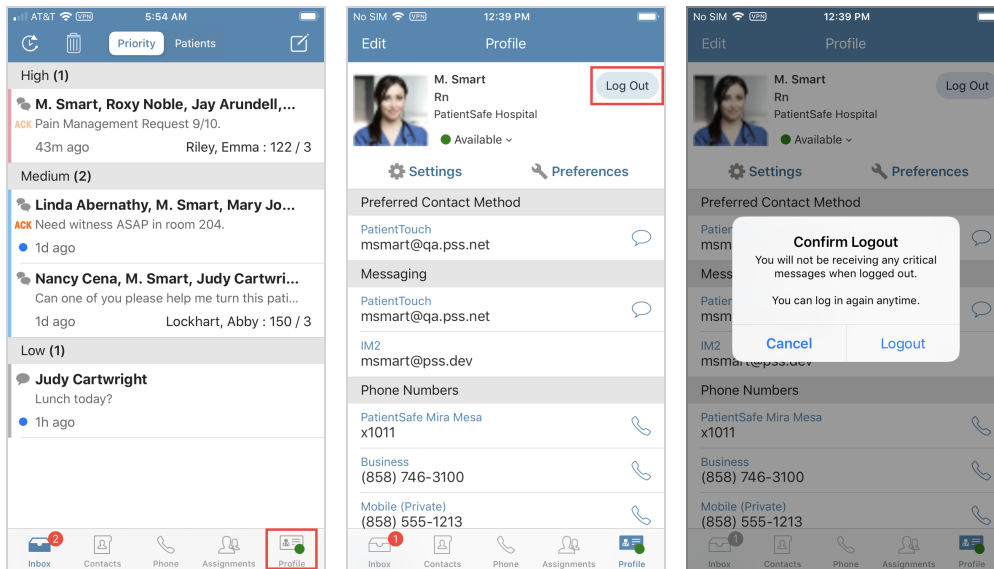
## AirStrip One

This feature allows users of Vocera Edge to seamlessly access AirStrip One to view patient specific clinical data. Users will be able log into Vocera Edge using valid credentials, click a link, and automatically launch AirStrip One, without having to authenticate into the second application.

Please contact Vocera Edge Technical Support Team for the Single Sign On Configuration document, which contains detailed instructions on how to configure this feature for your facility.

## Getting Started - Logging Out

Please use the instructions below to learn how to log out of the application, when it's time to end your shift or change devices.



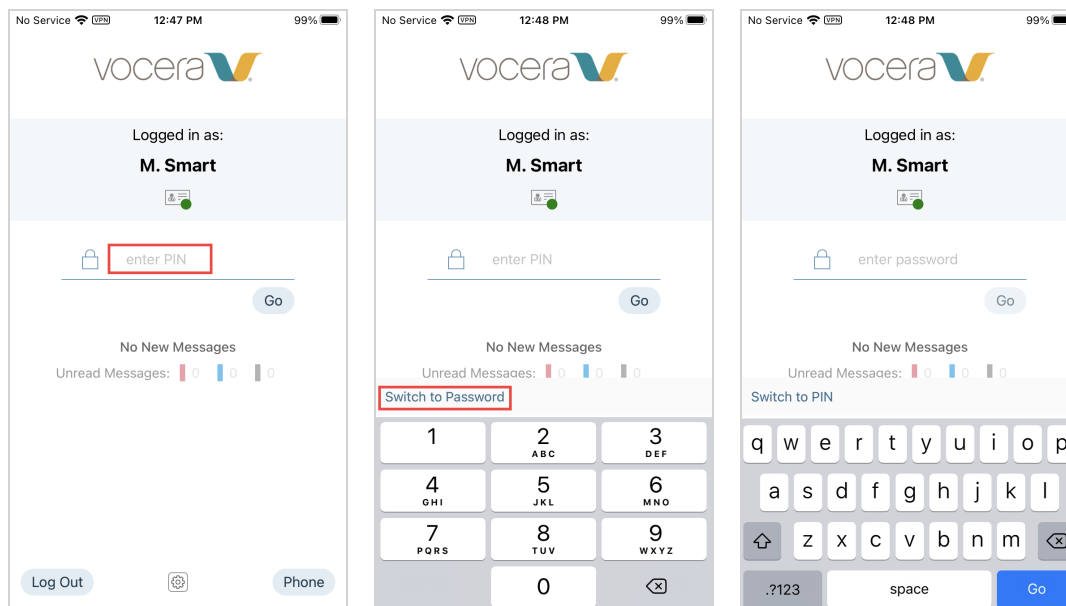
1. Touch the **Profile** icon.
2. Touch **Log Out**.
3. Touch **Log Out** on the confirmation screen to exit the application.

## Security Mode

After 10 minutes of inactivity (configurable in Enterprise Manager), the application goes into **Security Mode**.

### Log Out or Reauthenticate

Please follow the instructions below to learn how to log out of Security Mode or reauthenticate.



1. Touch **Phone** to quickly access the dial pad and make a
4. The numeric keypad displays for you to enter a PIN.
6. The alphanumeric keypad displays for you to enter your

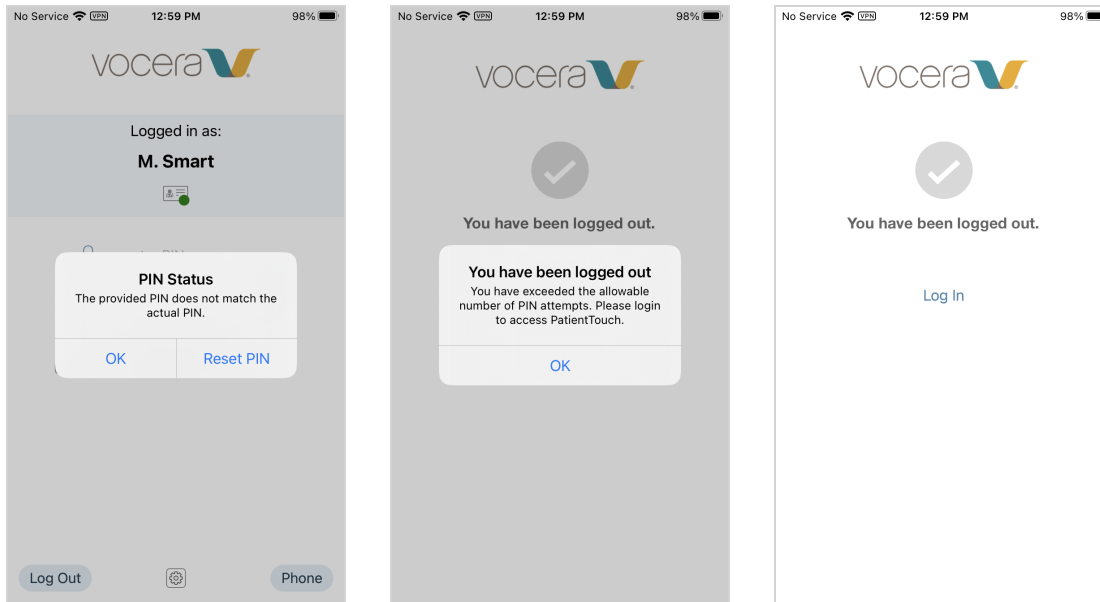


- call.
5. Touch **Switch to Password.** password.
2. Touch **Log Out** to log out of the application.
3. To reauthenticate, touch **enter PIN.**



## Max PIN Attempts

When caregivers attempt to enter their PIN, but have reached the maximum number of PIN attempts as configured in the Enterprise Manager, they will automatically get logged out of the system.



After entering an incorrect PIN, you will see the message as displayed here.

After reaching the maximum number of PIN attempts, you will be automatically logged out of the application...

...and need to log in again.

## Configuring User Preferences

### Persistent Login Mode

BYOD users have the option to set their application to run in persistent login mode. When this mode is turned on, users will receive notifications of new messages until they navigate to their profile page and explicitly "Log Out" of the application.

However, all devices, including Persistent Login users, will respect the Auto Logout setting configured in the Enterprise Manager, per hospital policy. Users will receive a notification when the auto logout time frame has been reached, to let them know they have been logged out. Users will no longer receive notifications of new messages until they log in again.

To use the Persistent Login feature, users must have their Settings as follows:

- "In-Hospital Shared" = off
- "Allow VoIP Calling" = off
- "Preferred Cellular Calling" = on/off (doesn't matter)



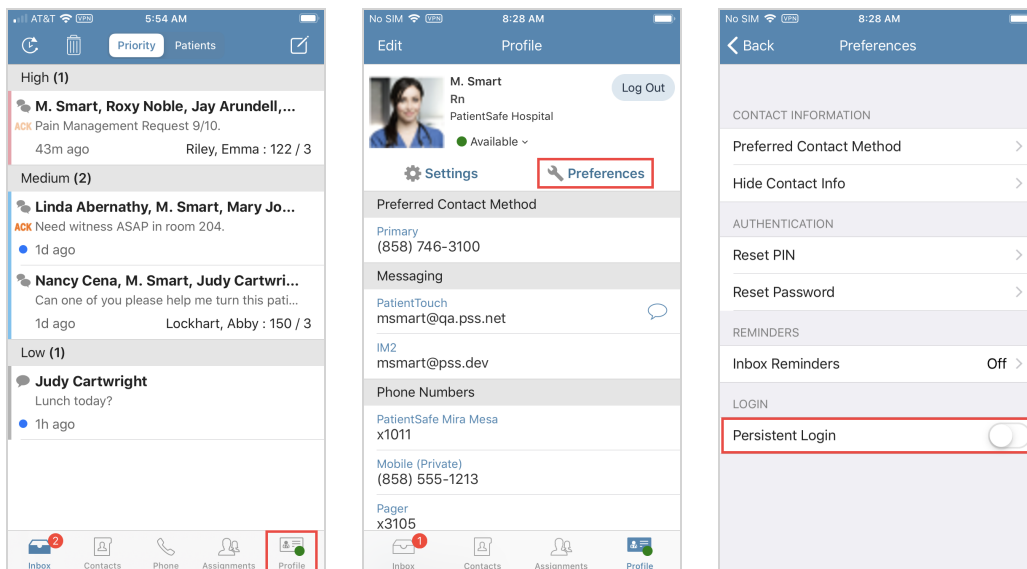
## Presence in Persistent Login Mode

When users are in persistent login mode, their presence will show as “available” to other users, unless they specifically change their presence to “busy” or log out.

Vocera Edge Communications recommends that when users know they will be out of range of connectivity, they set their status to “busy” or log out of the application. Users will continue to receive notifications as long as they have either wi-fi or cellular connectivity.

## Configure Persistent Login Mode

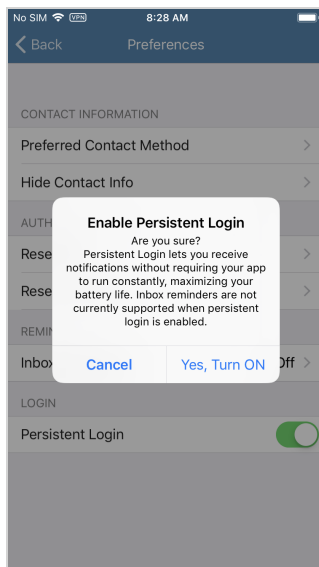
To configure persistent login mode, follow the instructions below.



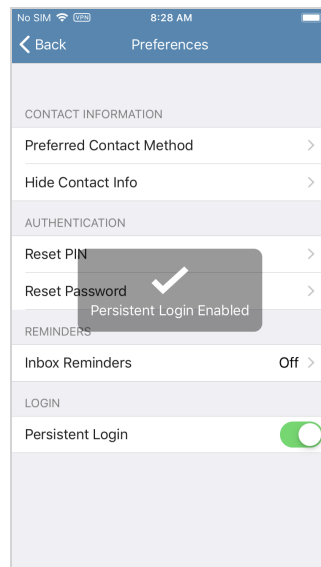
1. Touch the **Profile** tab.

2. Touch **Preferences**.

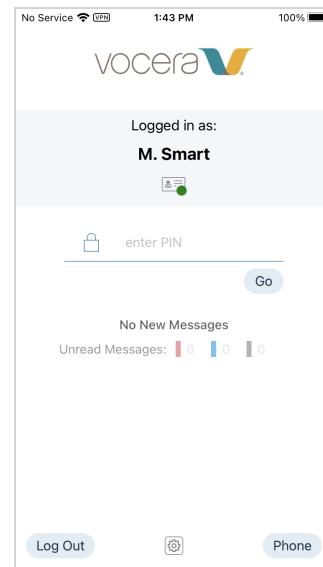
3. Toggle **Persistent Login** to "on" or green.



4. Touch **Yes, Turn On**.



5. A check mark displays indicating the **Persistent Login Enabled**.

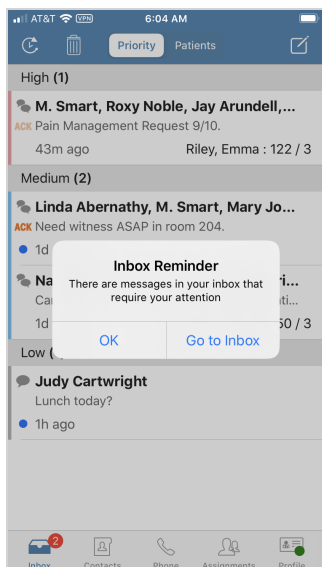


6. When you swipe to close the application and log back in, the application will be in **Security Mode**.

7. Enter your PIN or password to reauthenticate.

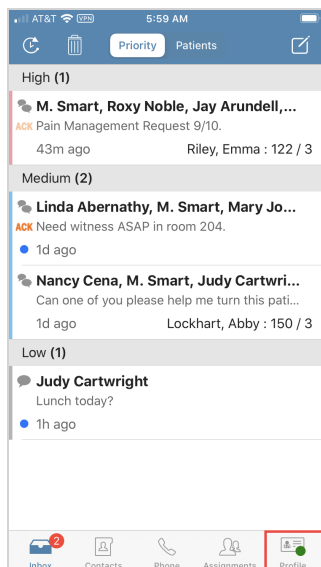
## Setting Inbox Reminders

If configured, users can choose to receive Inbox reminder notifications, as seen in the first image below. Inbox reminder notifications display when you have messages that require your attention. Inbox Reminder notifications display on your device, even when the application is in the background or is in lock screen. You can enable or disable the setting using the Profile tab>Preferences. Please use the instructions below to configure Inbox Reminder Notifications.

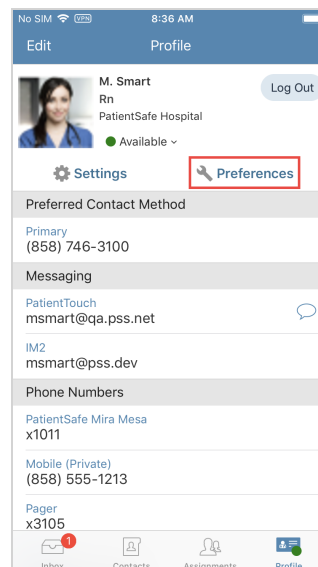


1. Touch **Go to Inbox** to see your messages.

2. Touch **OK** to return to the previous tab.



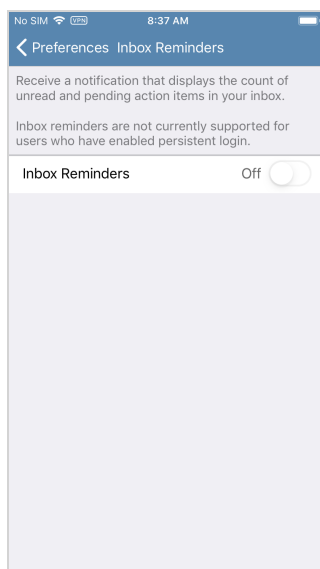
3. To configure inbox notification settings, touch the **Profile** tab.



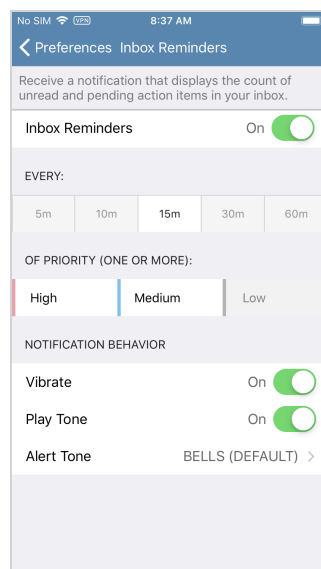
4. Touch **Preferences**.



5. Touch **Inbox Reminders**.



6. Toggle **Inbox Reminders** to "On".



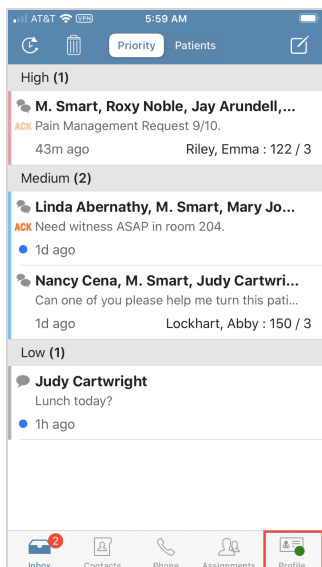
7. Select a **time frame** to receive reminder notifications.

8. Select the **message priority**.

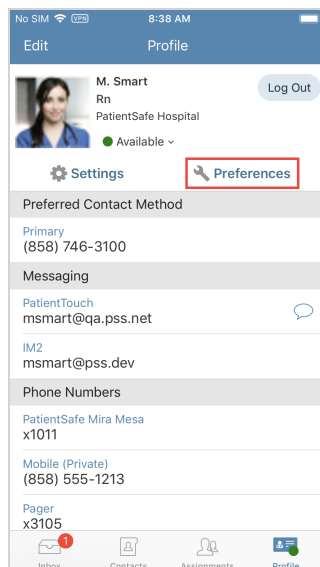
9. Select the **notification behavior**.

## Changing Your PIN/Password

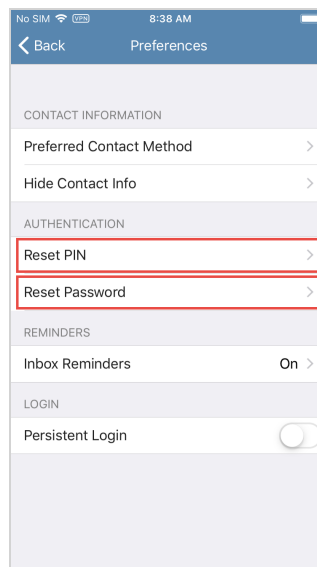
Vocera Edge Communications allows you to change your PIN/password in Vocera Edge. If you are using Active Directory (AD) you will not be able to change your password using Vocera Edge. Please use the instructions below to change your PIN/password.



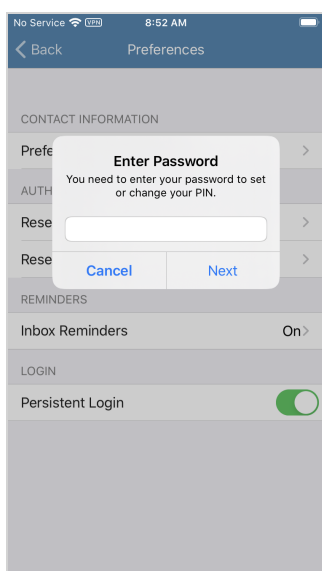
1. Touch the **Profile** tab.



2. Touch **Preferences**.

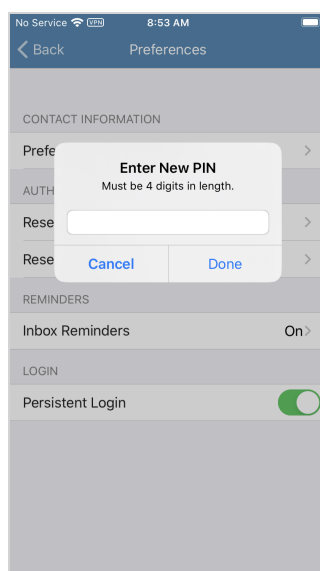


3. Touch **Reset PIN** or **Reset Password**.



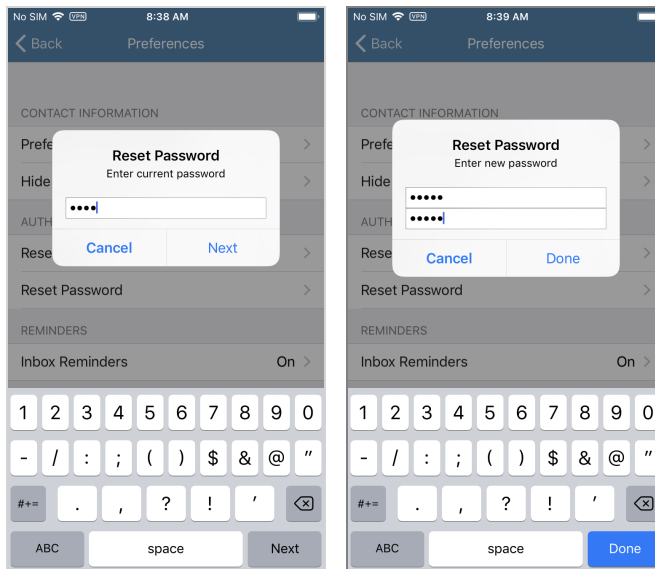
4. Enter your password to change your PIN.

5. Touch **Next**.



6. Enter your new 4-digit PIN.

7. Touch **Done**.



8. Enter your current password to change your password.

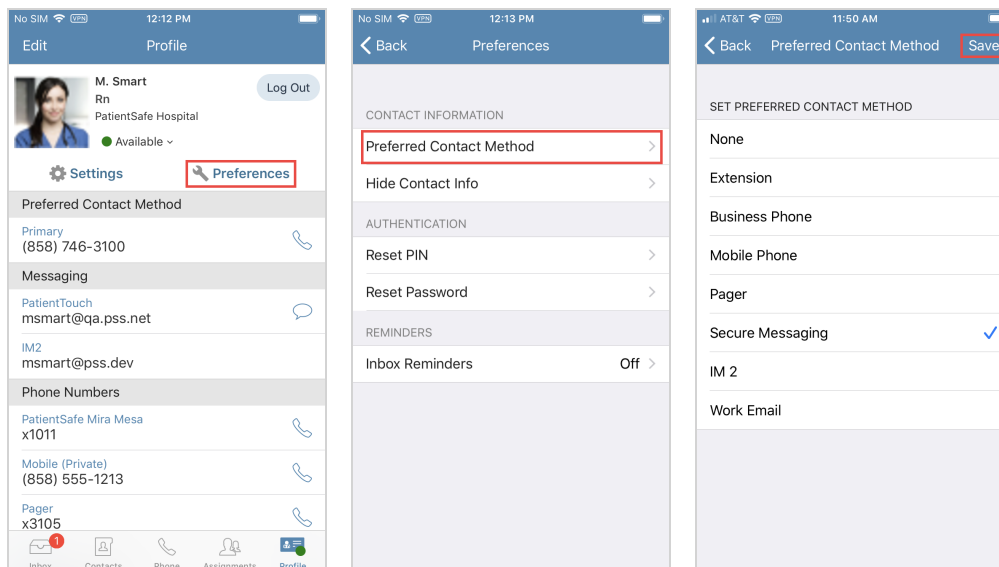
9. Touch **Next**.

10. Enter your new password twice.

11. Touch **Done**.

## User Preferred Contact Method

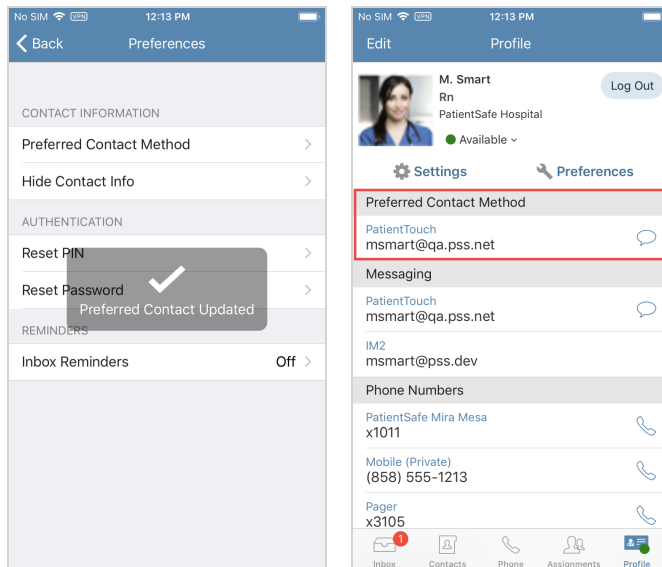
User preferred contact method is for all users of Vocera Edge Communications. This feature lets users indicate how best to reach them. For example, if one user prefers to be contacted by the primary phone number, they may select this option. If, however, another user wishes to be contacted by email, or text message, they may select these options. Preferred contact method can be set either globally in Enterprise Manager, or by the individual user through preferences. To configure your **Preferred Contact Method**, follow the instructions below.







1. From the **Profile** tab, touch **Preferences**.
2. Touch **Preferred Contact Method**.
3. Select the desired method of communication.
4. Touch **Save**.



5. A message displays indicating the preferred contact method has been updated.
6. The new contact method displays.

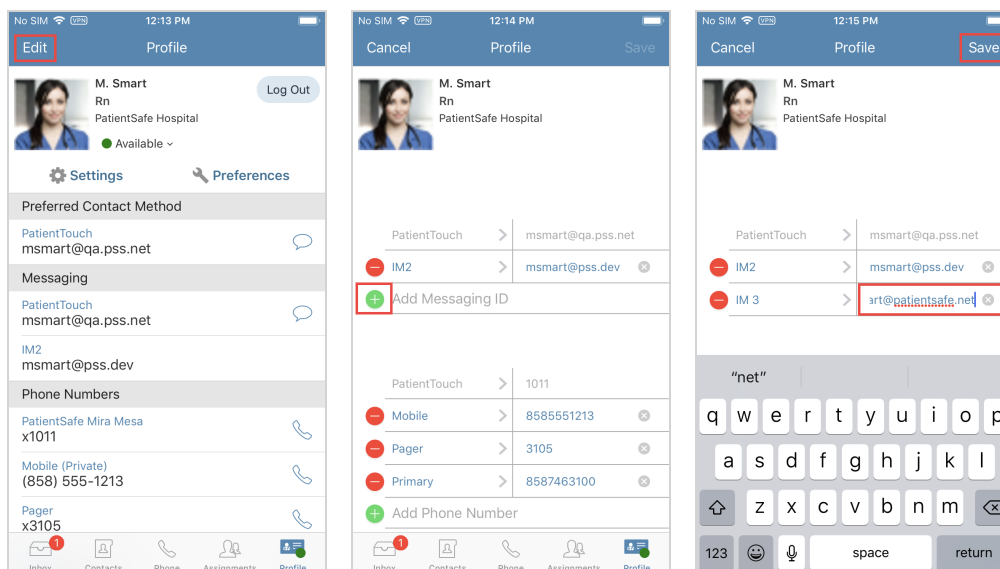
## Edit and Hide Contact Info

Physicians and executives may want to edit or remove incorrect or out of date contact information. Or, they may wish to hide their contact information from other users for privacy reasons. Vocera Edge Communications provides the ability for each caregiver to do this.

### Edit

This feature is primarily targeted at physicians and executives and provides the ability for them to add/edit/remove contact methods. Users must have the "Edit Contact Info" permission to use this feature.

To edit your contact information, follow the steps below.



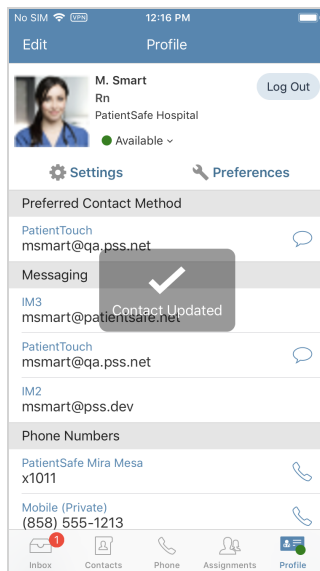
1. Touch **Edit** from the **Profile** tab.

2. Edit any of the communication methods available.

3. For example, touch the green plus sign to add a messaging ID.

4. Enter the new messaging ID.

5. Touch **Save**.

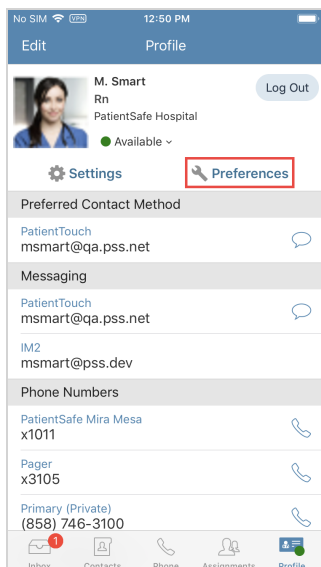


6. A message displays indicating a successful contact update.

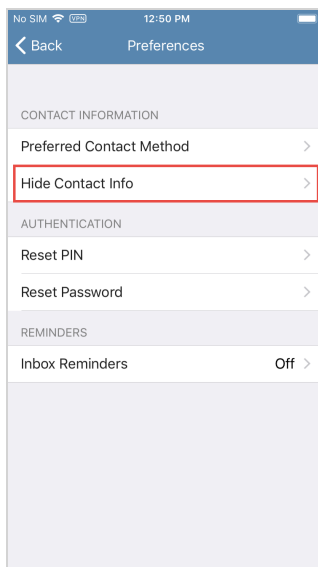
## Hide

This feature lets users hide their personal contact information while still remaining accessible through the application. For example, physician's and executives may not want other caregivers to see their private phone number. However, they may still want to be contacted via those means when they are logged into the application. Users can hide their contact information from other users with the Profile tab and the "Hide Contact Information" permission.

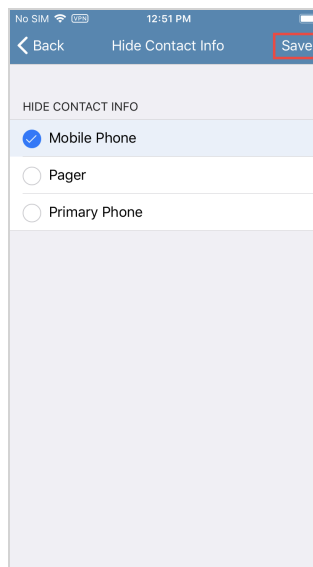
Use the instructions below to hide any of your contact methods. At this time, phone numbers are the only method of contact you can hide.



1. Touch **Preferences**

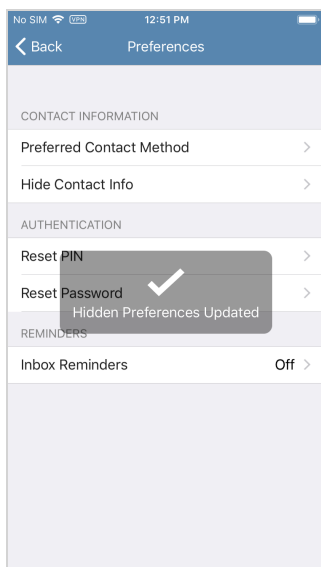


2. Touch **Hide Contact Info**.

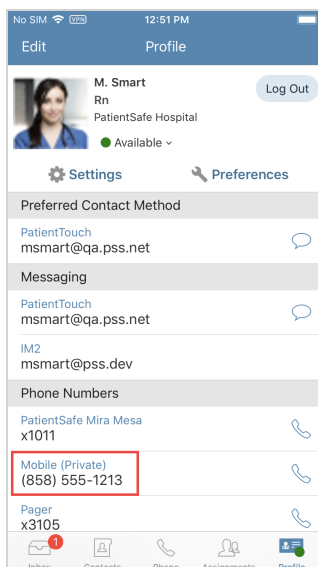


3. Select the number(s) you wish to remain hidden.

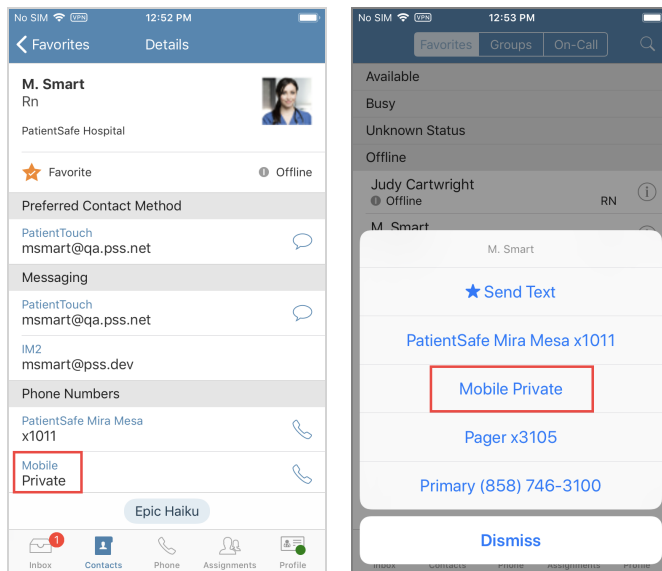
4. Touch **Save**.



5. A message displays indicating the hidden preferences have been updated.



6. The Profile screen displays the hidden contact information as "**Private**".



1. In addition, the **Contact Details** screen of *another user* displays the "**Private**" label to indicate the contact information is hidden.

2. If this user touches the Phone icon to make a call, the call will go through but the phone number will remain hidden.

3. When users touch M. Smart's name from the list of **Favorites**, the action sheet also displays the "**Private**" label.

## User Defined Status

### Background

Vocera Edge caregivers use presence to let others know when they are available, busy or offline. With User Defined Status, caregivers can optionally include a text status providing more details such as alternative contacts or how long they will be busy.

User Defined Status allows caregivers to:

- Change their presence from Available to Busy
- Optionally, enter a text description up to 50 characters. For example, where they are and an extension to call while they are busy
- Save the information until a designated time in the future

### Configuration

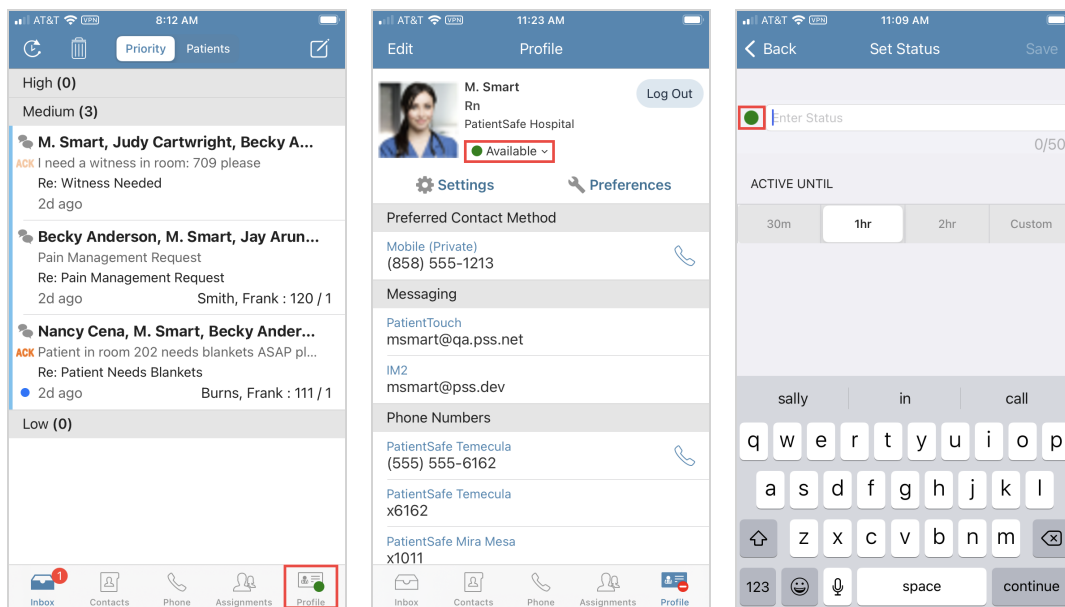
- Facilities must have the Enterprise Manager>Settings>Secure Messaging>User Defined Status setting enabled

- If Emoji support is enabled (Enterprise Manager>Settings>Secure Messaging>Emoji Support), user defined statuses can also include emojis

## User Experience

In the scenario below, you will see how nurse M. Smart sets her status and changes her presence to reflect her surgery schedule for the day. You will also see how M. Smart's updated status appears to other users.

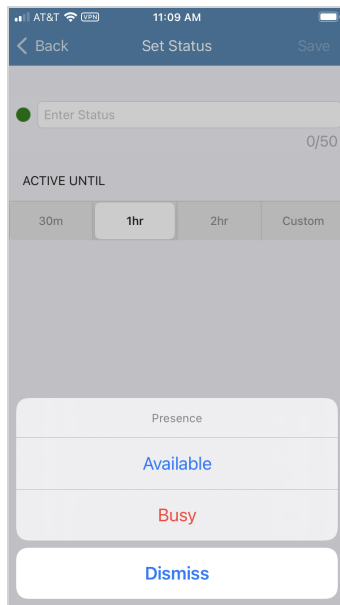
### M. Smart's Screens



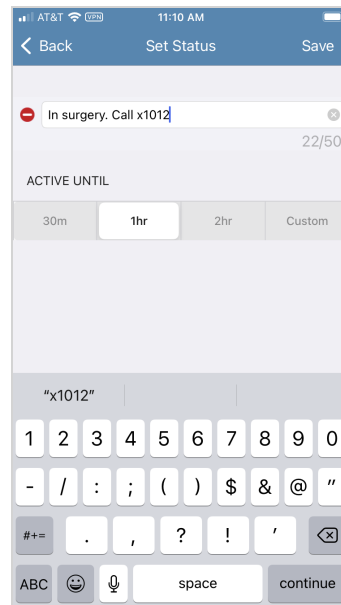
1. To set your status, touch the **Profile** tab.
2. Touch the **Presence** drop down menu.
3. Touch the **Presence** icon.



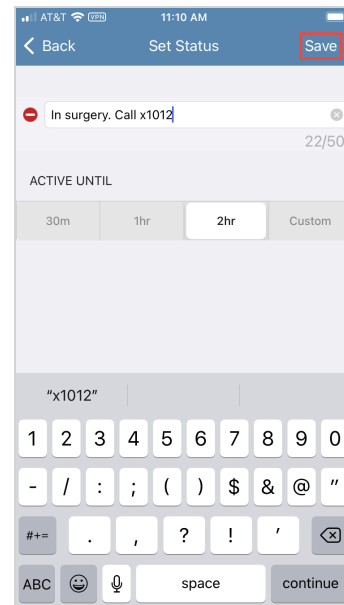
**Text descriptions are limited to 50 characters.**



4. Touch **Busy**.



5. Optionally, enter a text description of your status. You may enter your whereabouts during "busy" time and also add an extension for others to call while you are busy.

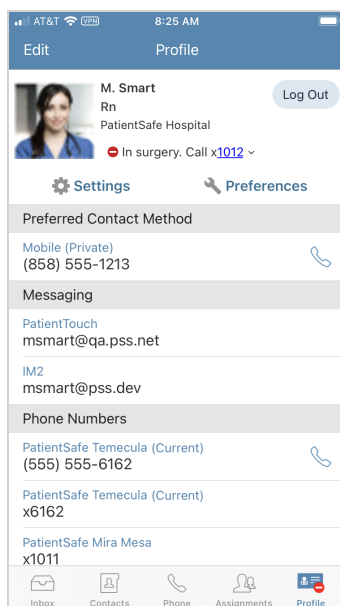


6. Select the time frame for Vocera Edge to clear your status. Touch **2hr**.

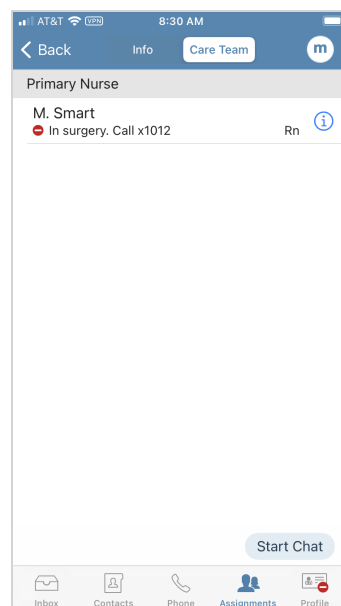
7. Touch **Save**.



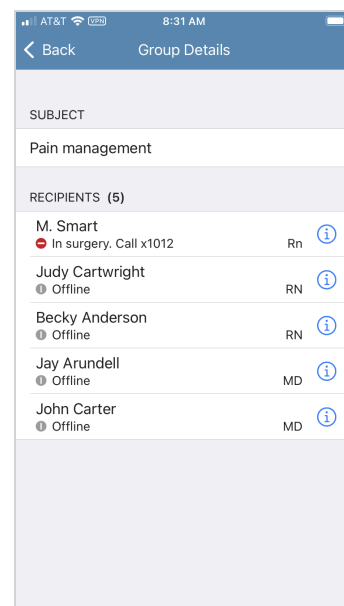
**An expiration time is required in order to save your status or update your presence.**



8. M. Smart's status has been



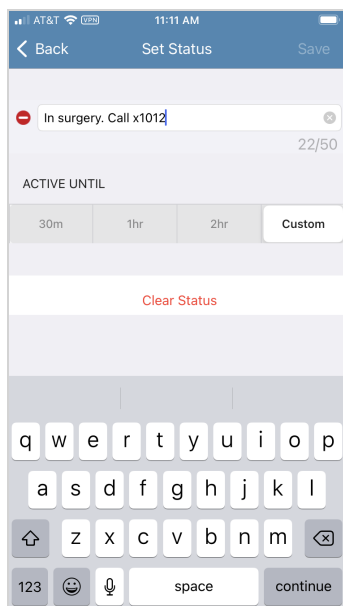
9. A user's status displays on



10. ...and Group Details.

saved and after 2 hours her status will return to Available.

many screens including a patient's Care Team....



11. If a status has been set, touching on presence to edit or make changes will include the option to Clear Status. Touch **Clear Status** to clear your status.

### *Nancy Cena's Screens*

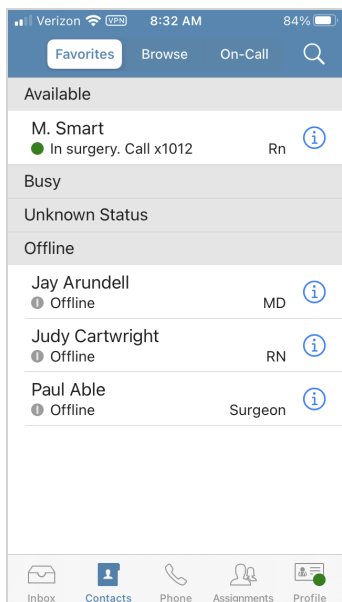
Next, let's see how M. Smart's status appears to other users.

**The favorites screen is no longer real time. When M. Smart's presence and status changes,**

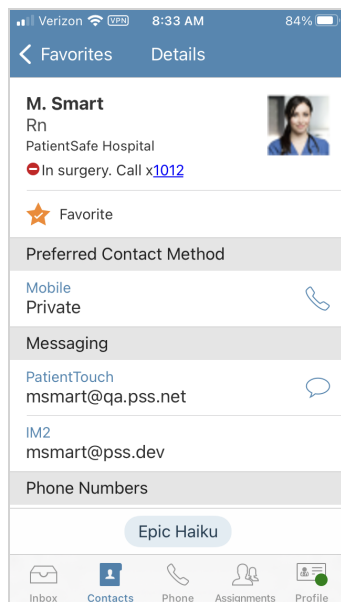


**Nancy Cena will only be able to see that change after she refreshes her screen.**

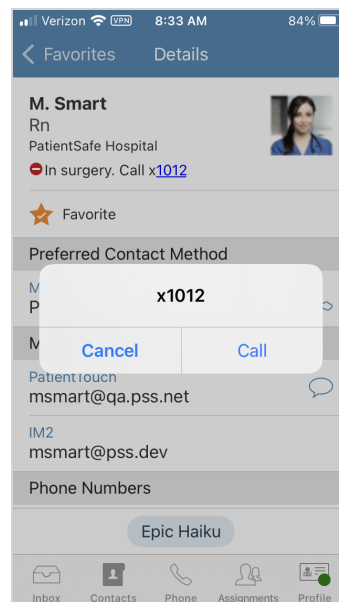




1. Nancy Cena's Contacts>Favorites shows M. Smart's updated status.
2. Click the **Info** icon to access Contact Details.



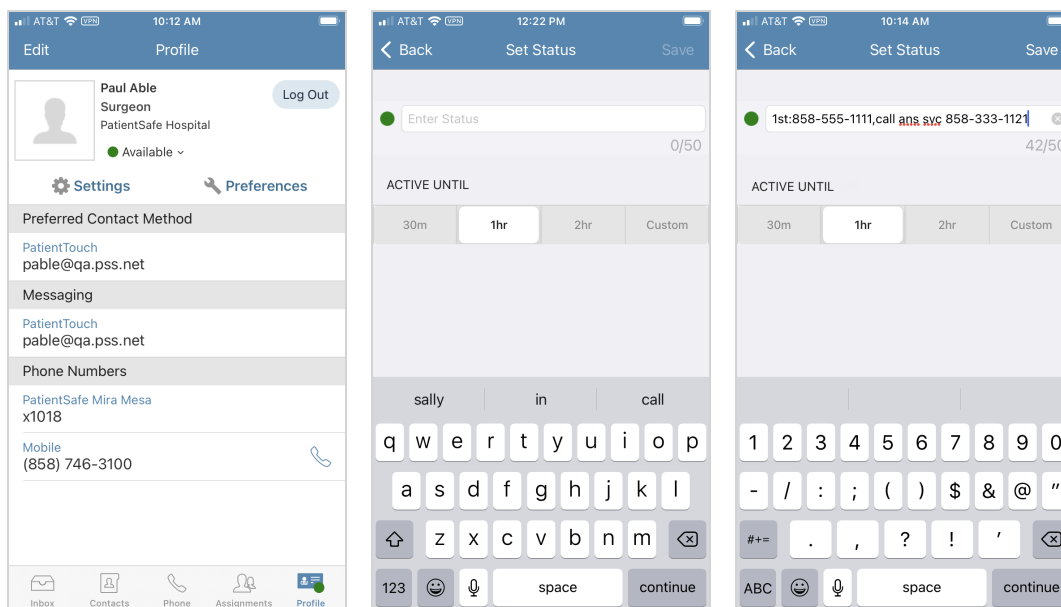
3. Contact Details also displays M. Smart's current status. Touch x1012 to call the designated contact.



4. Touch **Call** to connect with this extension.

## Dr. Paul Able's Screens

Next, you will see how a surgeon can set his call order using User Defined Status.



Dr. Able is going to set his call order so users know what number to use to reach him first.

1. Touch the **Presence** drop down menu.

2. His presence will remain Available so others know they can reach him.

3. Enter the status message in the text field.



1st:858-555-1111,call ans svc 858-333-1121

ACTIVE UNTIL

30m 1hr 2hr Custom

4. The call order has been entered. Dr. Able wants users to first call him using the first number. Subsequent attempts to reach him can be placed at the answering service.

1st:858-555-1111,call ans svc 858-333-1121

ACTIVE UNTIL

30m 1hr 2hr Custom

5. Enter a custom time frame for Vocera Edge to clear the status by touching **Custom**.

1st:858-555-1111,call ans svc 858-333-1121

ACTIVE UNTIL

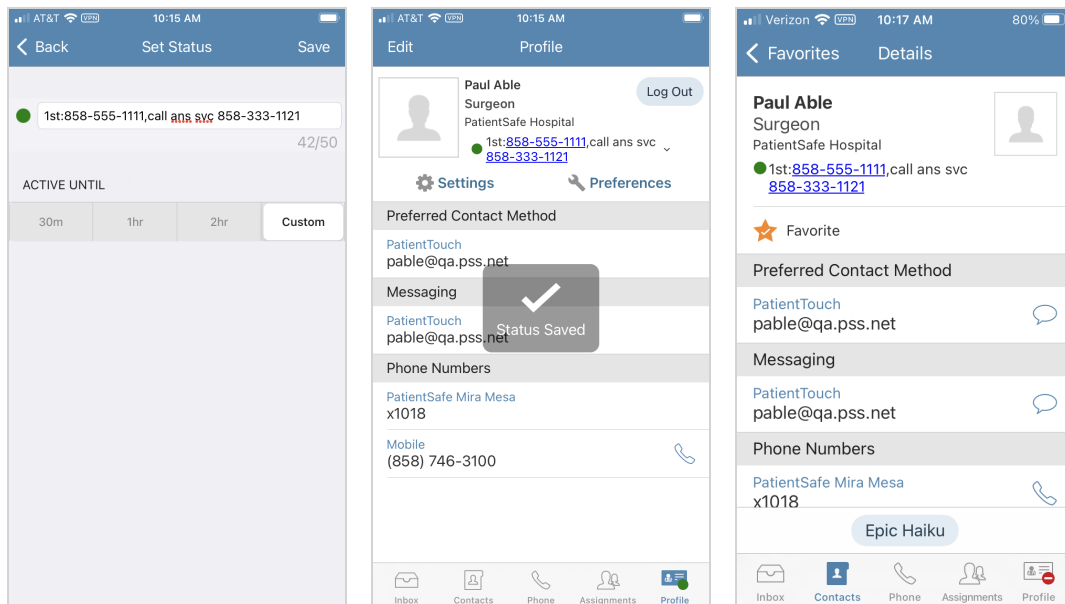
30m 1hr 2hr Custom

Done

Sun May 2	7	56
Mon May 3	8	56
Tue May 4	9	57
Wed May 5	10	58
Thu May 6	11	59 AM
Today	12	00 PM
Sat May 8	1	01
Sun May 9	2	02
Mon May 10	3	03
Tue May 11	4	04
Wed May 12	5	05

6. A custom picker for Vocera Edge is displayed. The picker will allow expiration times to be saved up to one year from the current day.

7. Touch **Done**.



8. Touch **Save**.

9. Dr. Able's status has been saved and it will remain this way until the expiration time or until he changes it.

10. From another user's Contact Details, touch either of the phone numbers to place a call.

## Scheduled Busy

### Background

Scheduled Busy provides BYOD users additional control of their availability by allowing them to set their presence so that it automatically turns to "busy" during hours they do not want to be reached. This feature is recurring and is useful for example, when a caregiver does not want to be reached during their off hours. Caregivers may include an optional text status with a contact phone number for others to call during their down time. After the defined scheduled busy time, the caregiver's presence automatically turns back to Available. If the caregiver has also set a User Defined Status, that will take precedence.

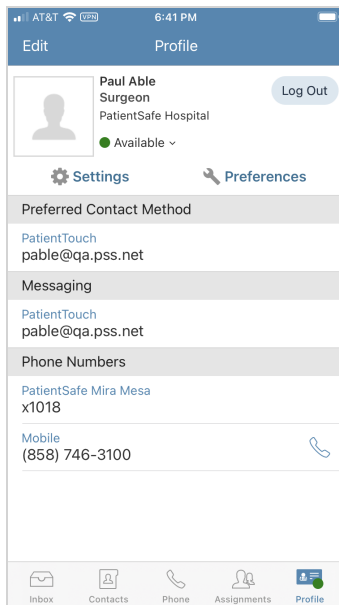
### Configuration

- Facilities must have the User Defined Status setting enabled (Enterprise Manager>Settings>Secure Messaging>User Defined Status).
- Optionally, facilities can have Enterprise Manager>Settings>Secure Messaging>Emoji Support enabled to include emoji's in their text status messages.
- Devices must be BYOD with Persistent Login enabled.

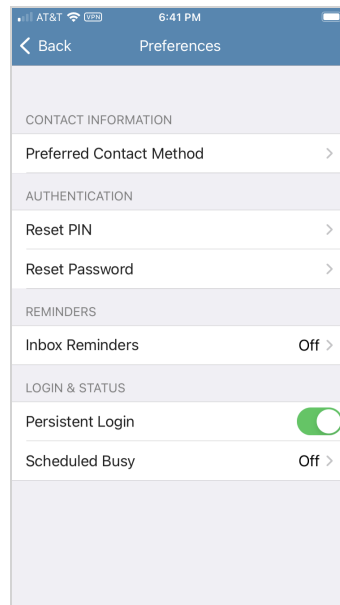
### User Experience

In the scenario below, Dr. Paul Able is going to let others know he is out of reach during his off hours. He will include a text status with a contact phone number for others to call during his down time.

Read the instructions below to learn how to configure Scheduled Busy.

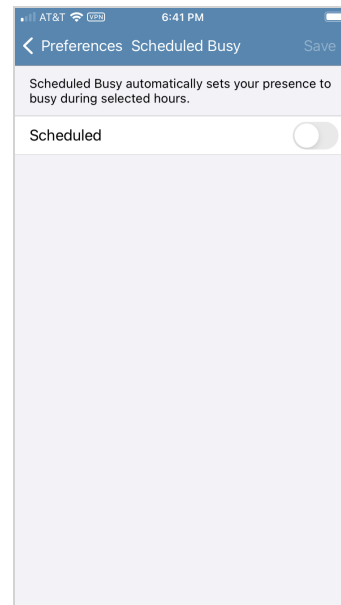


1. From the Profile tab, touch **Preferences**.

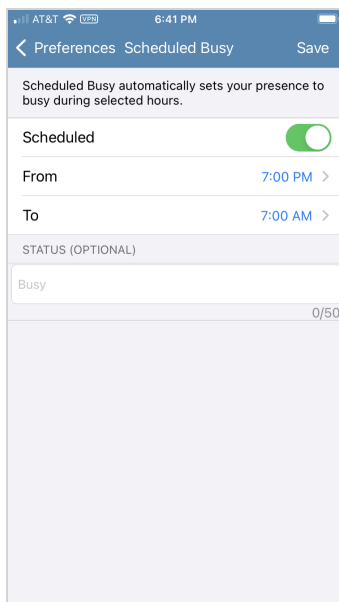


2. Toggle Scheduled Busy to **On**.

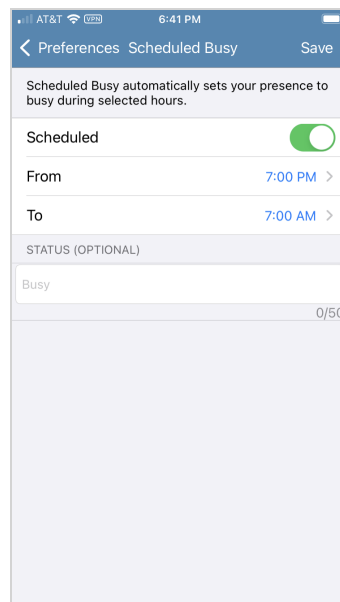
**Note:** Persistent Login must be enabled.



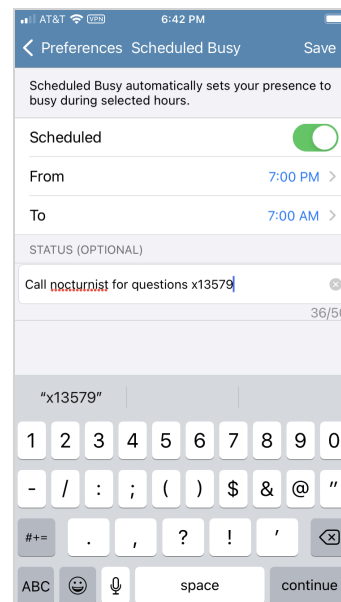
3. Toggle Scheduled to **On**.



4. Enter the time frame you will be busy in the **From** and **To** fields. For this scenario, we will use the time frames in the image above.

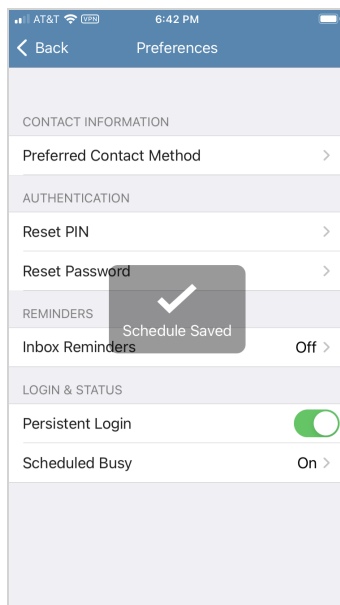


5. Touch the **Status** field to enter a text status message.

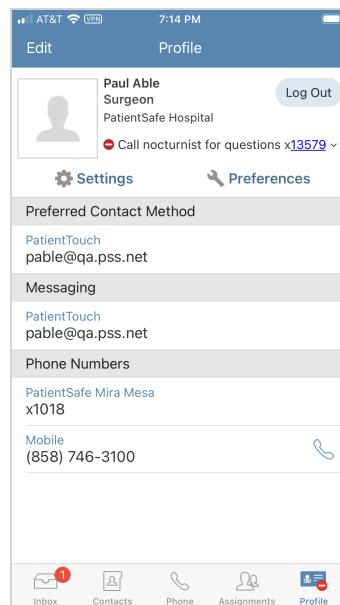


6. Enter the text status message.

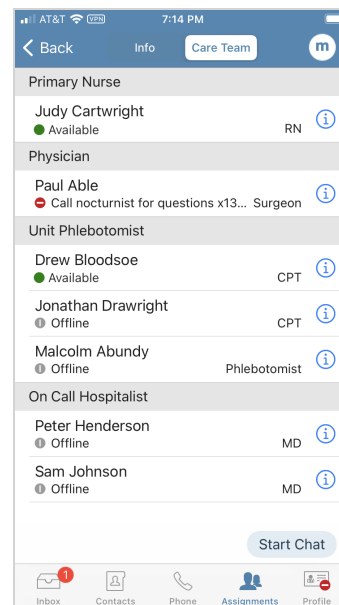
7. Touch **Save**.



8. The white check mark indicates **Scheduled Busy** has been saved.



9. The status change is reflected in Dr. Able's **Profile** tab.

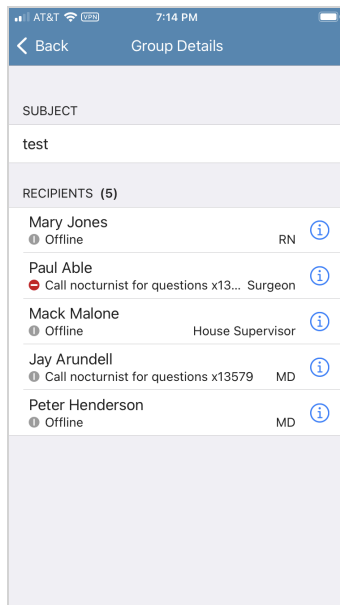


10. Other screens that reflect the status change include the **Care Team**.

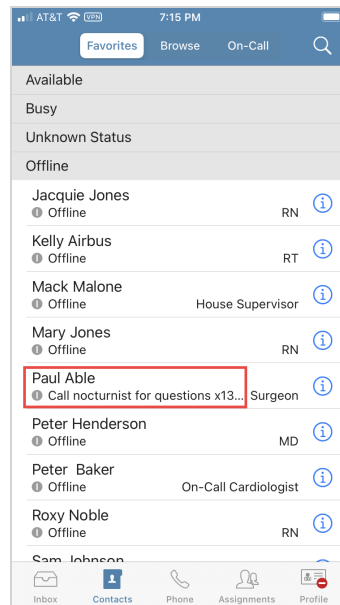
Once a **Scheduled Busy** time frame has been saved, it is recurring day after day. You will



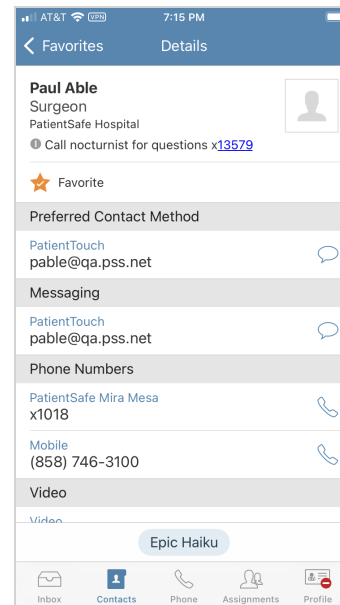
have to **disable the setting** in order to clear your status.



11. Group Details.



12. Favorites. When the caregiver is offline, the text status message still displays.



13. Contact Info. Users may touch the extension to place a call to the nocturnist.







## Inbox & Messaging

### Viewing the Inbox

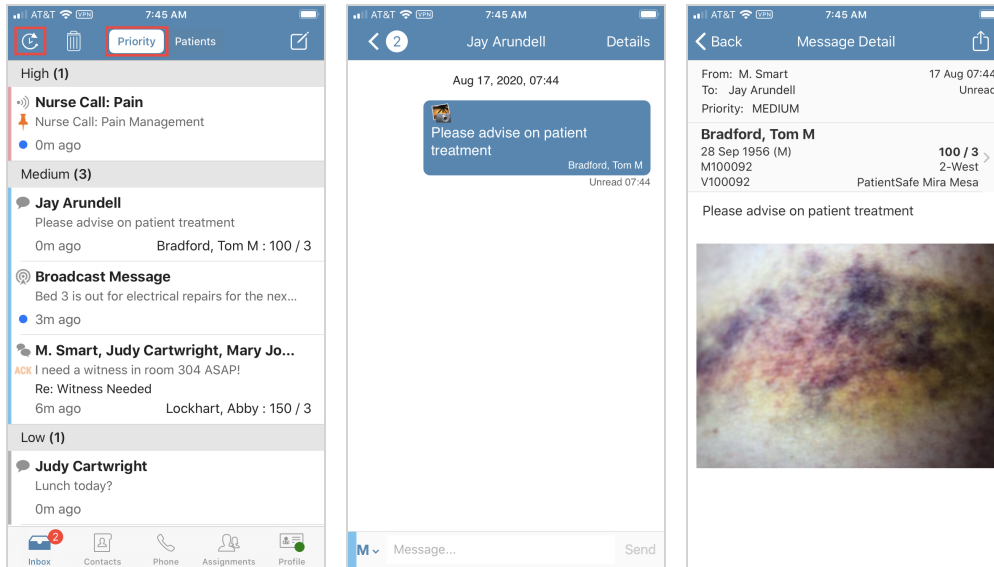
Vocera Edge Communications keeps track of all your messages, alerts, and notifications. By prioritizing your **Inbox** Vocera Edge Communications directs your attention to the most critical messages first.

### Message Summary

Icons on a message summary indicate the purpose of the message or it may indicate that action is required. Review the table below for icon descriptions.

Informational Icons:			Icons that require action:		
					
Group message	One-to-one text message	Broadcast message	Request acknowledgment	Unread message	System Alert

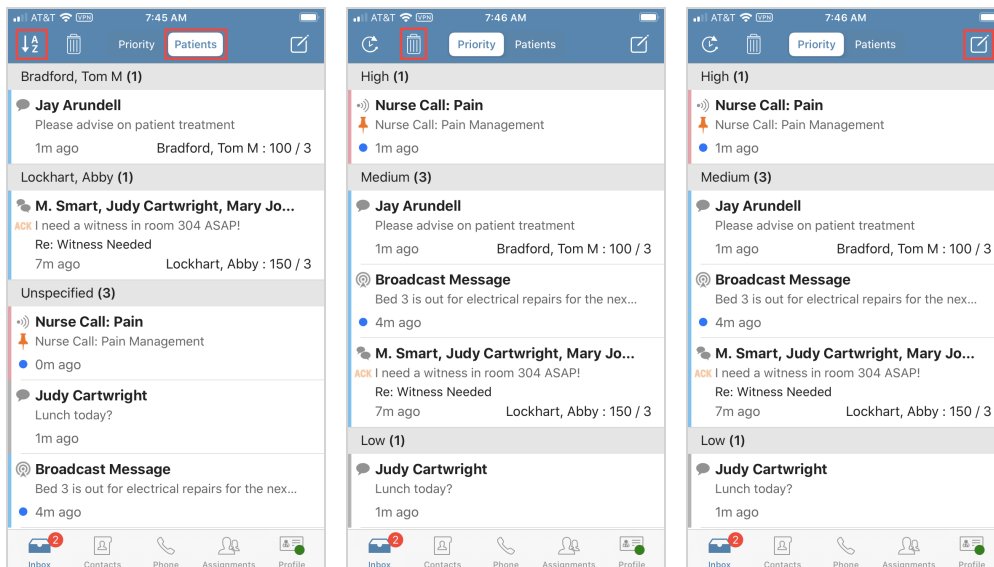
Please follow the instructions below to learn more about the Inbox.



1. View your **Inbox** by Priority (and sort by time).

2. Touch individual message bubbles to view message details.

3. This is where all audio clips, images, and patient tags will be displayed.



4. View messages by **Patient** name (and sort by name or room number).

5. Delete a message. Refer to the [Deleting a Message](#) topic.

6. Compose a new message. Refer to the [Composing a Text Message](#) topic.

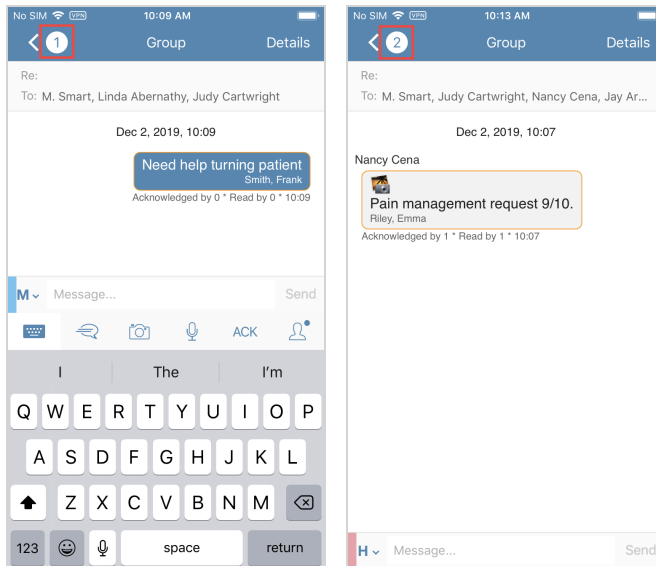




## Unread Message Count

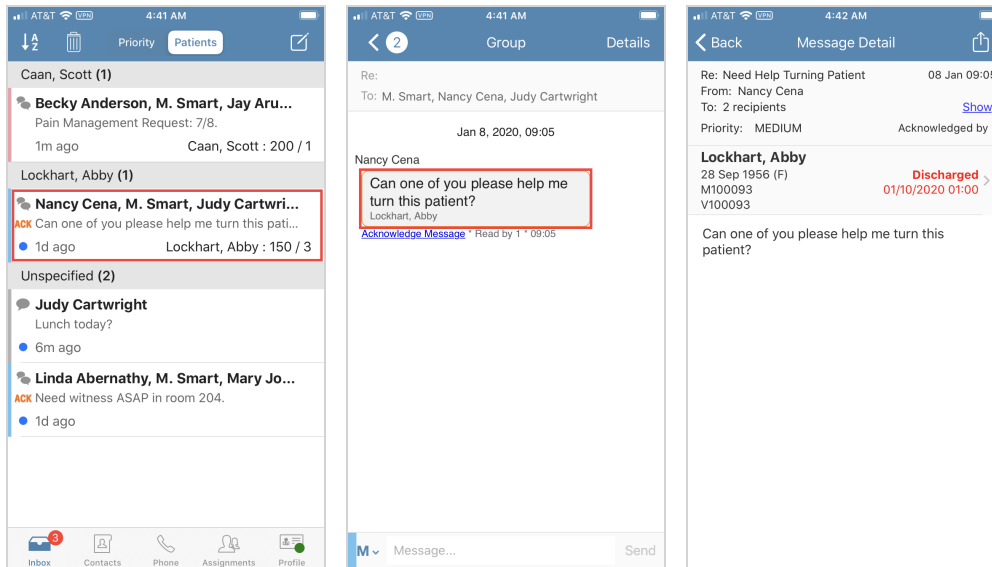
Vocera Edge Communications supports the display of unread message count on conversation details for all types of notifications, including external notifications, broadcast messages, new order notifications, and so on. This is to help decrease missed notifications.

If you have one or multiple conversations going at once and have unread messages from any of these conversations, the unread message count will reflect the total number of unread messages from all conversations.



## Messages with Inactive Patients











If you receive a message with a tagged patient who has since become inactive (discharged or no activity within 40 days), the message will indicate the patient's status.



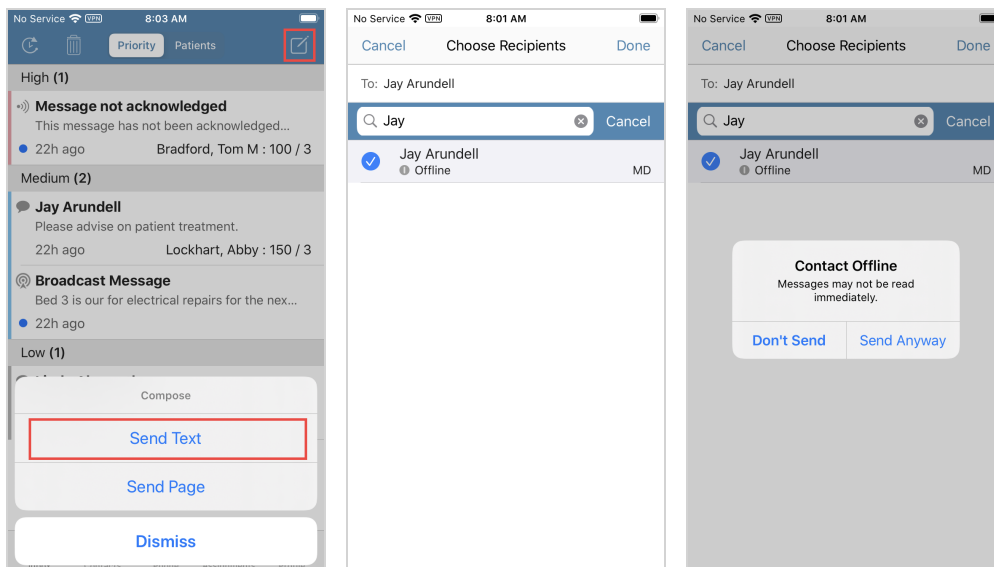
1. Touch the message to view its content.
2. Touch the message bubble.
3. The message displays with the patient's discharged status.

## Composing a Text Message

Users may compose a text message to other users and include images, audio, tagged patients, and more. When composing a text message, icons prompt caregivers to include specific information, such as an image for example. Refer to the summary of icons and associated descriptions below.

									
Search or Add Recipients	Set Msg Priority	Type Msg	Select Quick Text Msg	Take or Attach Image	Record or Attach Audio	Request Message Acknowledgment	Tag Patient	Send Msg	Attach emoji's

Please follow the instructions below to learn how to send a text message.



1. From the Inbox, touch the **Compose** icon>**Send Text**.

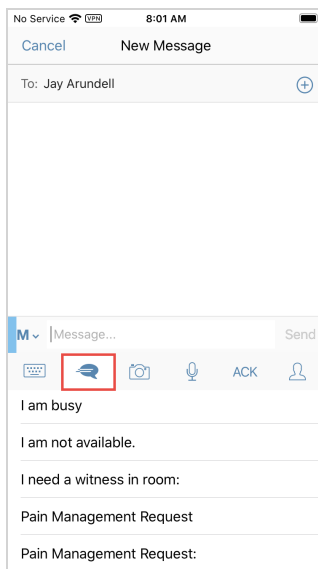
Please refer to the [SMS Paging](#) topic to learn how to send a page.

2. Type the recipient name in the "To" field.

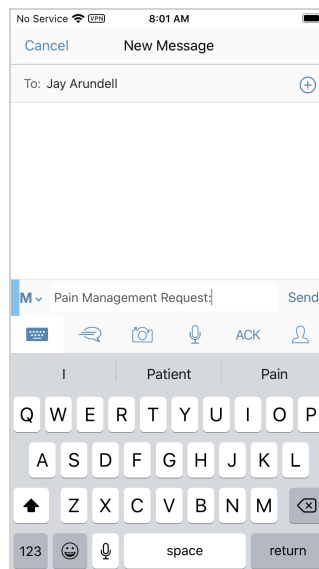
3. Select the recipient name and touch **Done**.

4. A **Contact Offline** message indicates that the recipient is offline.

5. Touch **Send Anyway**.

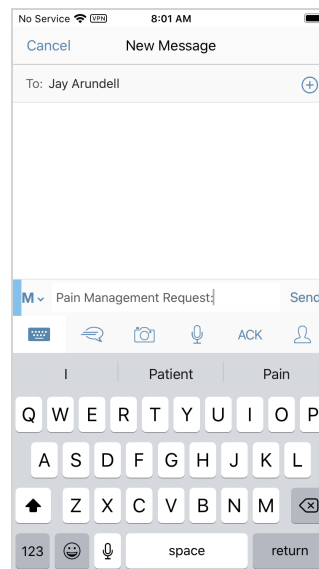


6. Enter your message using the keypad. Or, touch the **Quick Text** icon and select a quick message.

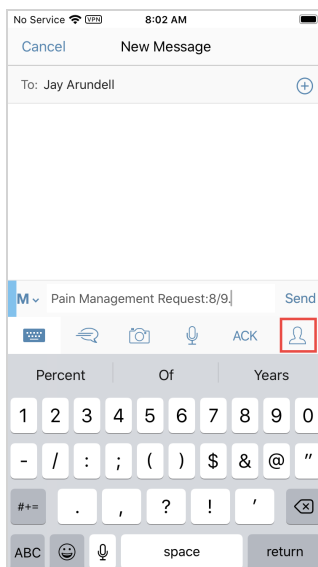


7. Touch the **Camera** icon to attach an image.

8. Touch the **Microphone** icon to record or attach audio.

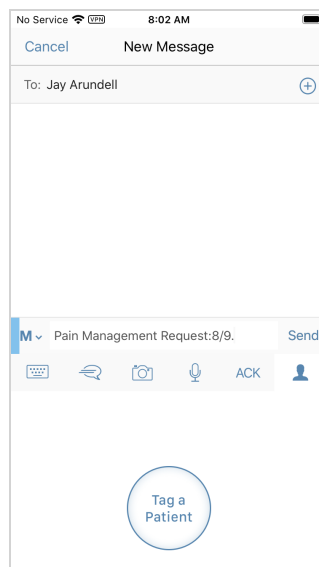


9. Touch the **ACK** icon to request message acknowledgment.

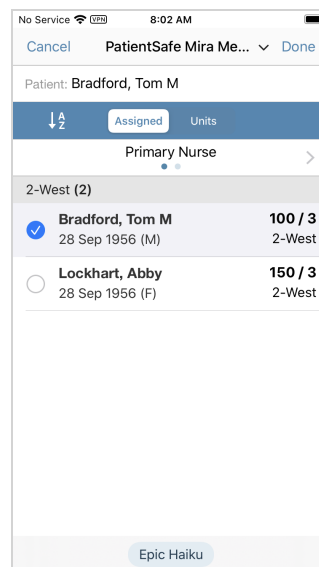


10. Touch the **Emoji** icon to send an emoji.

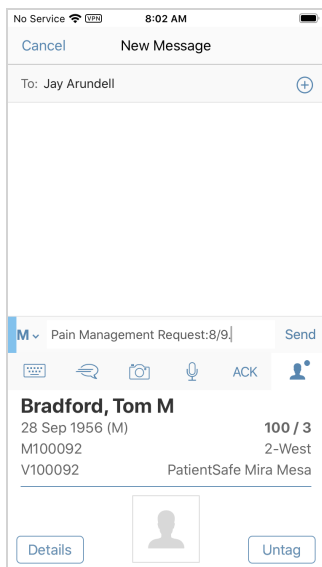
11. Touch the **Tag Patient** icon to tag a patient.



12. Touch **Tag a Patient**.



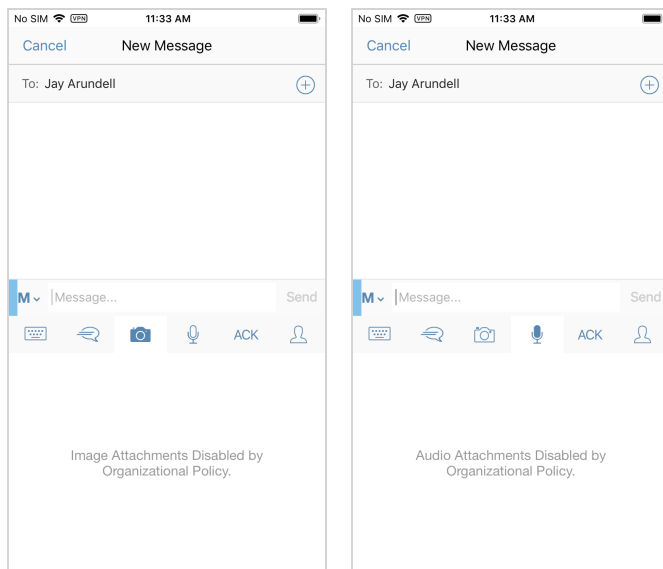
13. Select the assigned patient's name and touch **Done**.



#### 14. Touch **Send**.

### Enable or Disable Image and Audio Attachments

Image and audio attachments may be disabled, per hospital policy. If the functionality is disabled, a message will display.

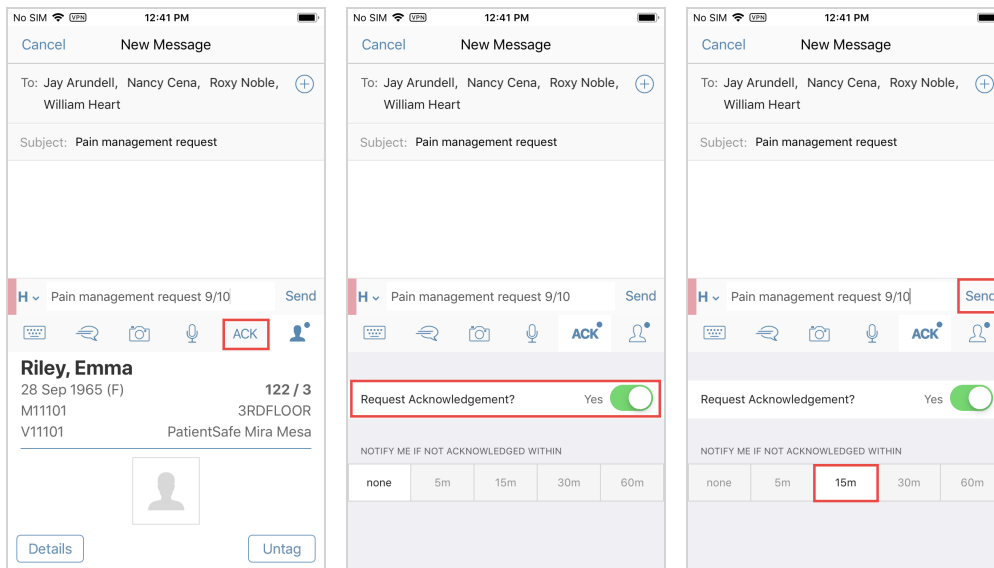


### Acknowledging a Request

Users can compose a message and include an Acknowledgment Request, which requires the recipient of the message to acknowledge receipt. Optionally, a user can include an acknowledgment reminder that provides notification if the recipient(s) has not acknowledged the message within a designated time frame.

Acknowledgment requests can be included in a message to one or more recipients. The scenario below is of a group message. Users must have the "Request Message Acknowledgment" permission to use this feature.

## Sender

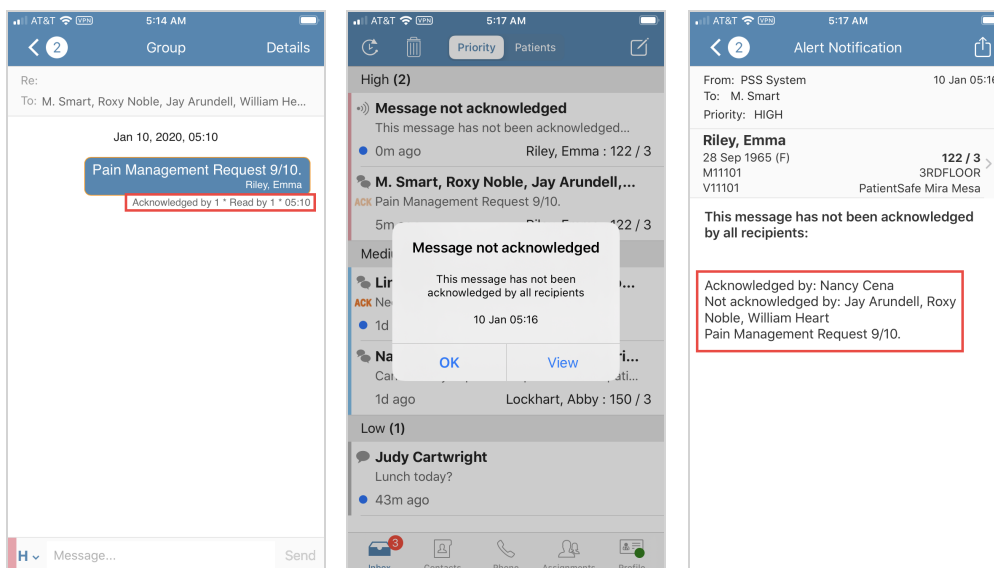


1. To include an acknowledgment request on a composed message, touch **ACK**.

2. Toggle the **Request Acknowledgement** field to **Yes**.

3. Select the time frame to receive notification if the recipients have not acknowledged receipt.

4. Touch **Send**.



5. The message displays with the number of recipients

6. When recipients have **not** acknowledged the message

8. The Alert Notification displays the name(s) of the



who have read and  
acknowledged the message.

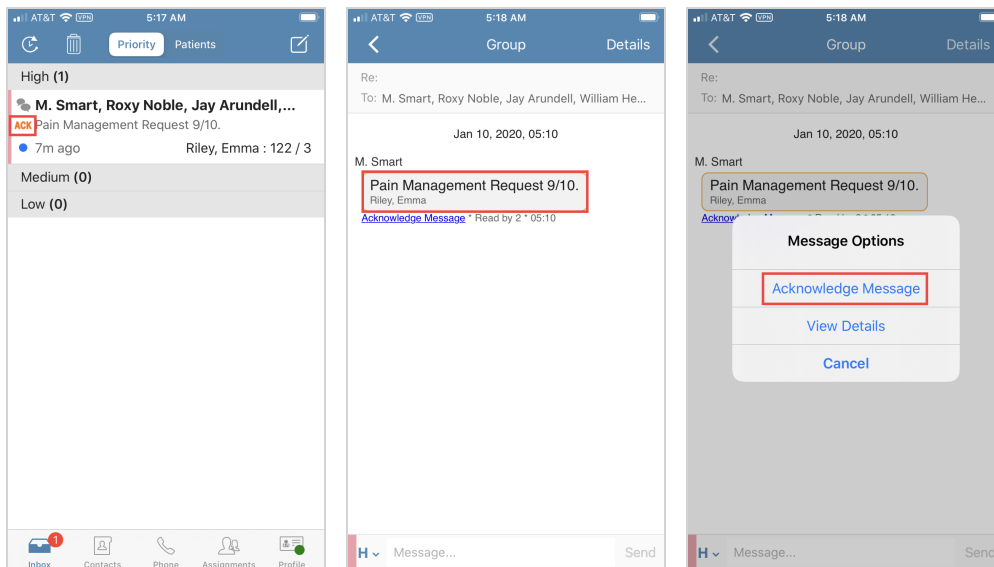
within the designated time  
frame, a notification displays.

person(s) who have/have not  
acknowledged.

7. Touch **View** to see the  
details.

## Receiver

Please use the instructions below to learn how to acknowledge a message.



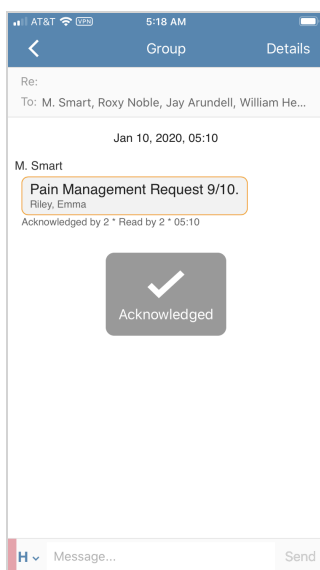
1. The inbox displays an **ACK** icon for messages that require acknowledgment.

2. Touch the message summary.

3. Touch the **Message bubble**.

4. A notification message displays.

5. Touch **Acknowledge Message**.

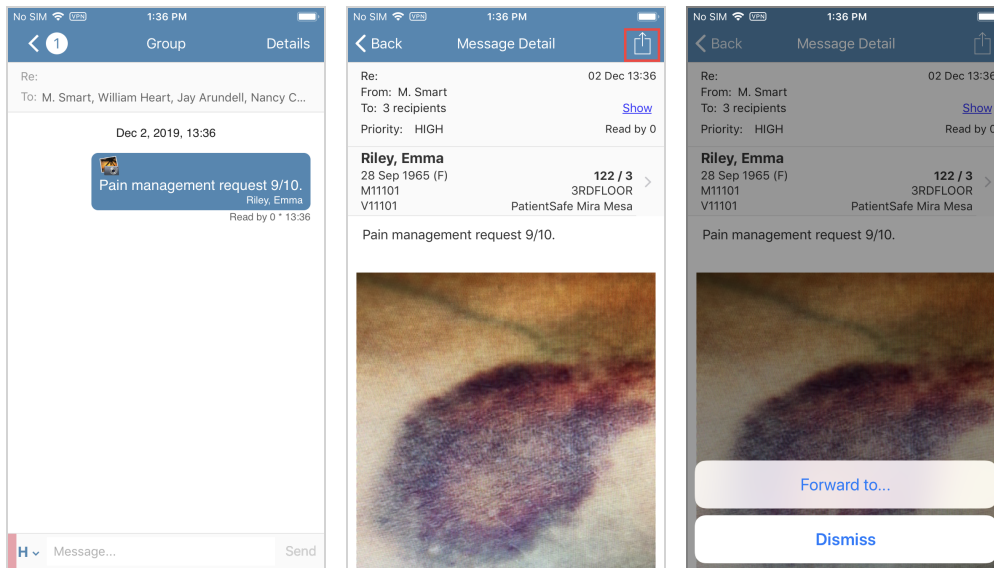


6. A check mark displays.



## Forwarding Messages

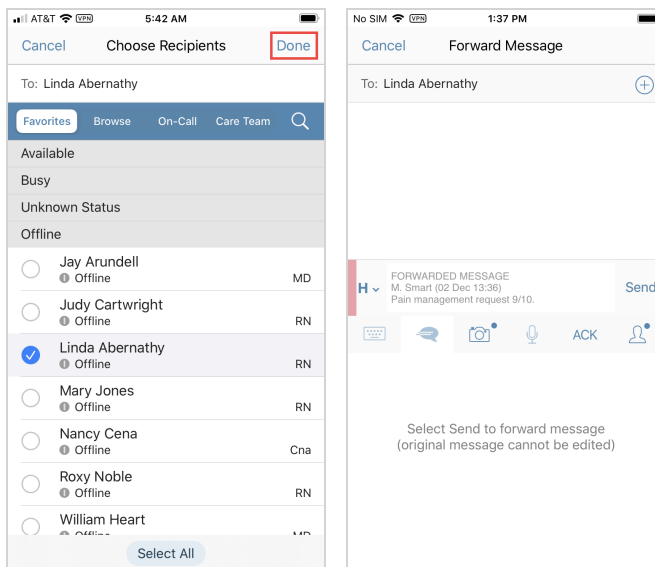
Vocera Edge Communications allows you to forward messages to one or more caregivers. Please use the instructions below to learn how to forward messages.



1. Touch the message to open it.

2. Touch the **Forward** icon.

3. Touch **Forward to...**



4. Type the recipient name in the "To" field or select a recipient from Favorites.

5. Touch **Done**.

6. You cannot modify the original message.

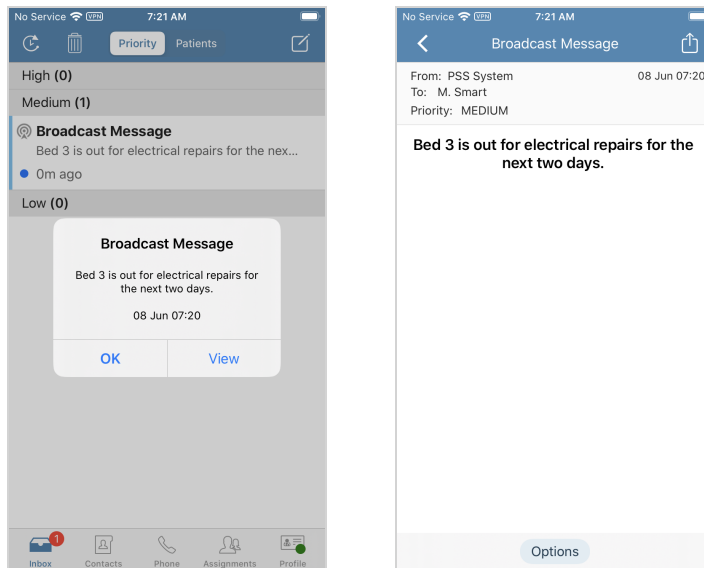
7. Touch **Send**.

## Targeted Broadcast Message

Users with the "Broadcast Messaging" permission have the ability to send a targeted broadcast message from Enterprise Manager to the following different groups:

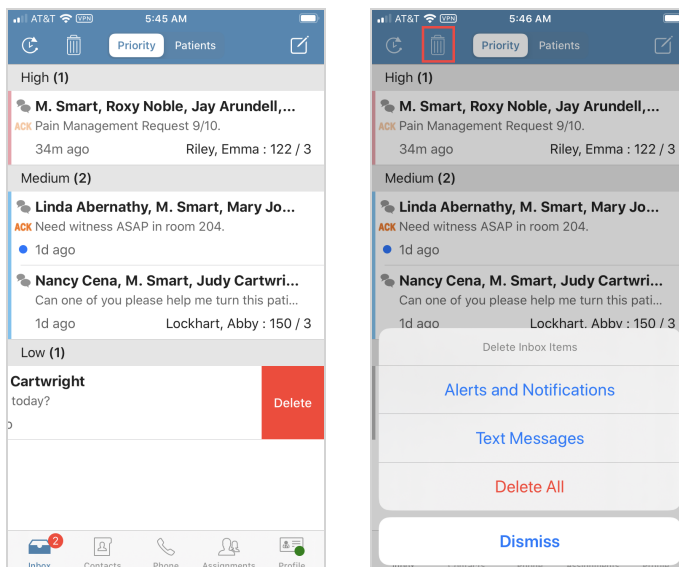
1. Users in a nursing unit, team, group (org unit)
2. Users in a care role
3. Users in different departments

A sample broadcast message displays below that was sent to nurses in a specific nursing unit.



## Deleting a Message

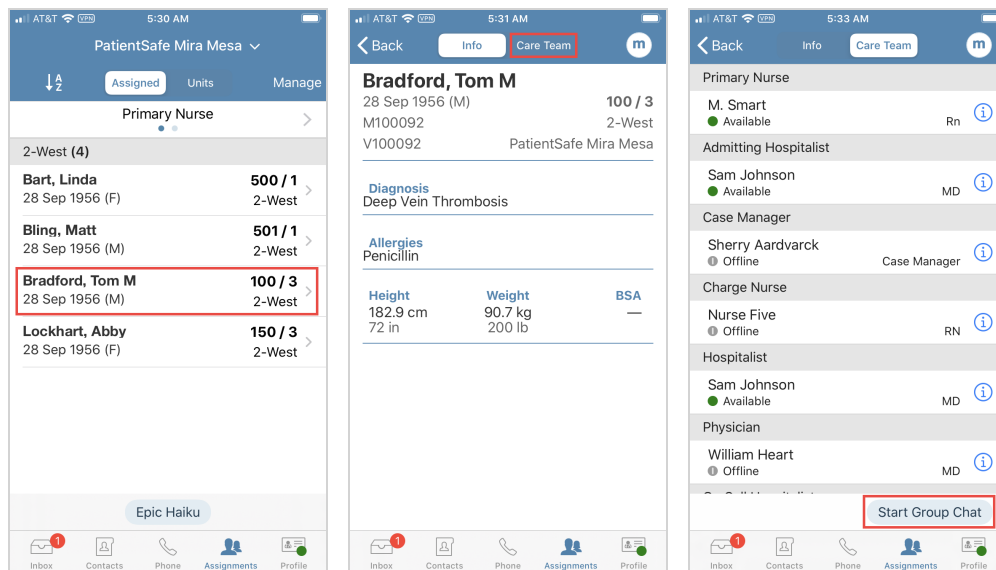
There are two methods you can use to delete messages: 1) Swipe left, or 2) Touch the Trash Can icon.



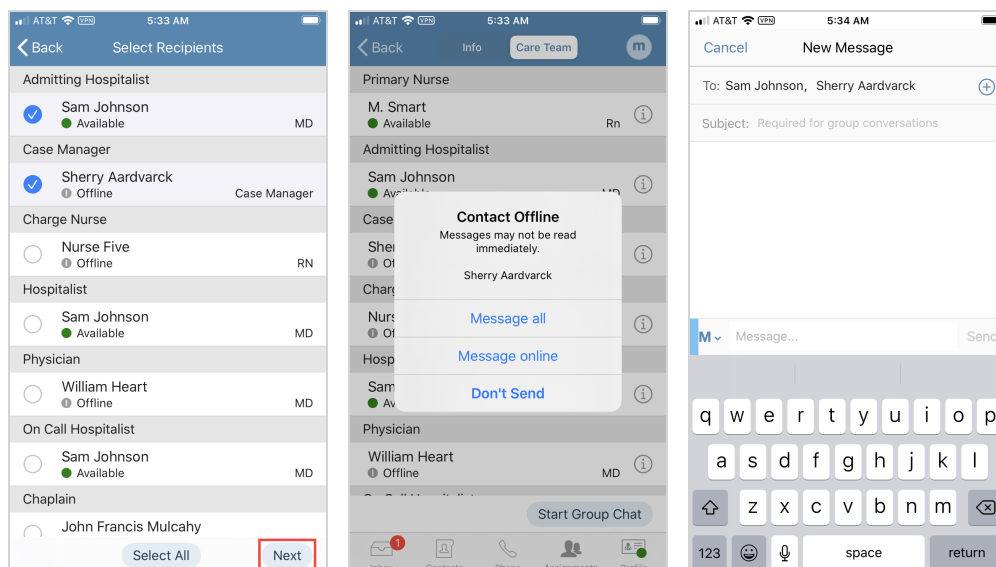
1. To delete a message, swipe left on the message in the Inbox tab and touch **Delete**.
2. To delete multiple messages at once, touch the **Trash Can** icon and select from the choices above.

## Partial Care Team Group Chat

Please use the instructions below to use **Start Group Chat** to send a text message to selected care team members.



1. From the **Assignments** tab, select a patient.
2. Touch **Care Team**.
3. Touch **Start Group Chat**.





4. Select the empty circle(s) next to the members you want to contact.
5. Touch **Next**.
6. If configured, a **Contacts Offline** message displays.
7. Touch **Message all**.
8. Compose your secure message to the selected recipients.

## Alerts and Notifications

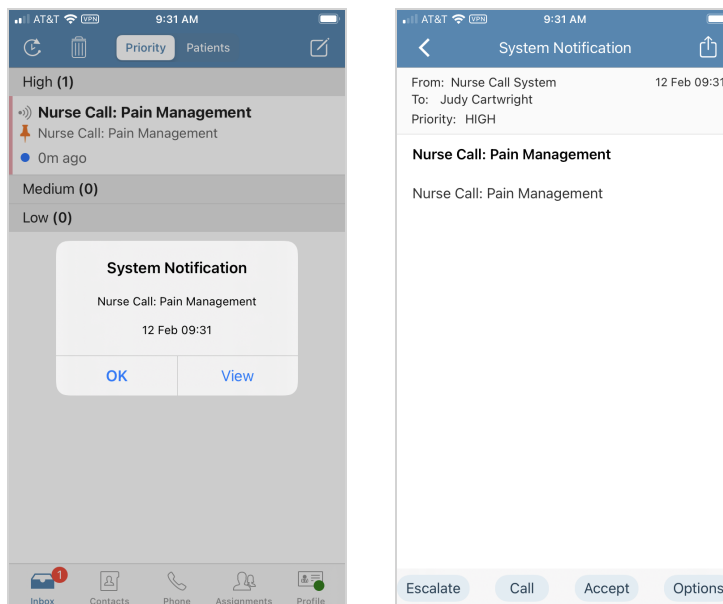
Alerts and notifications are sent to the caregiver's Inbox. Caregivers can touch View to access the alert. Caregivers may touch the following buttons to quickly respond to an alert:

**Escalate:** Escalates the alert to the next nurse or caregiver in the nursing unit.

**Call:** Places a call back to the patient's room.

**Accept:** Let's other caregivers know you've accepted the request.

**Options:** Options displays the option to delete the alert or dismiss the overlay and return to the Inbox.



## VoIP Calling

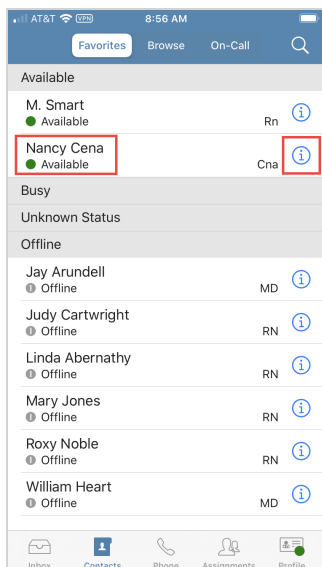
### Placing and Receiving a Call

#### Placing a Call

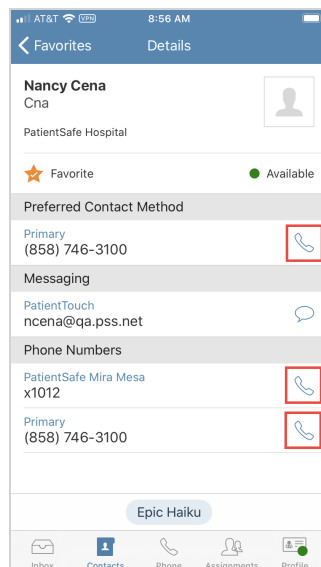
Hospital issued shared devices have VoIP capabilities and you can use them to place and receive calls.

However, personal device users do not have VoIP capabilities and will need to use their native cellular phone application for calls.

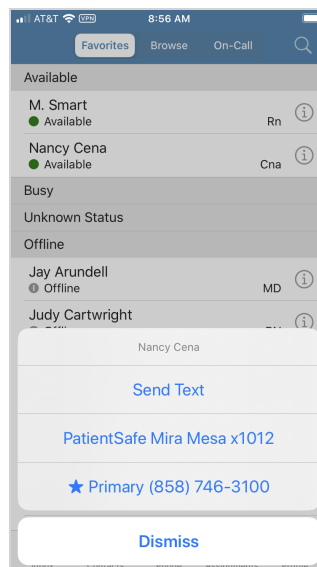
Please use the instructions below to place and receive calls using hospital shared devices.



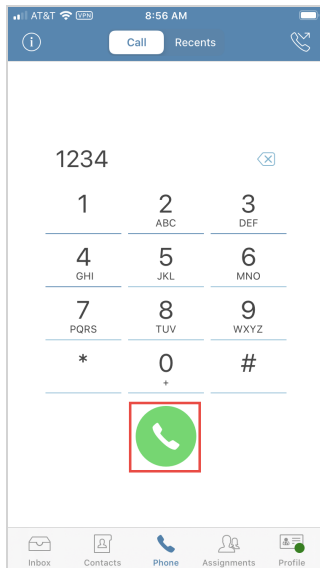
1. From the Contacts tab, touch the **Info** (i) icon or the **Name** of the contact you wish to reach.



2. Touching the **Info** (i) provides **Contact Details** where you can touch the phone icons to place a call.

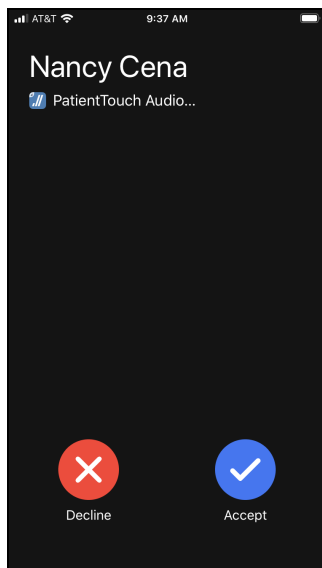


3. Touching the **Contact Name** provides an action sheet where you can touch the designated number to place a call.



4. Or, enter the extension or phone number manually and touch the **Call** icon.

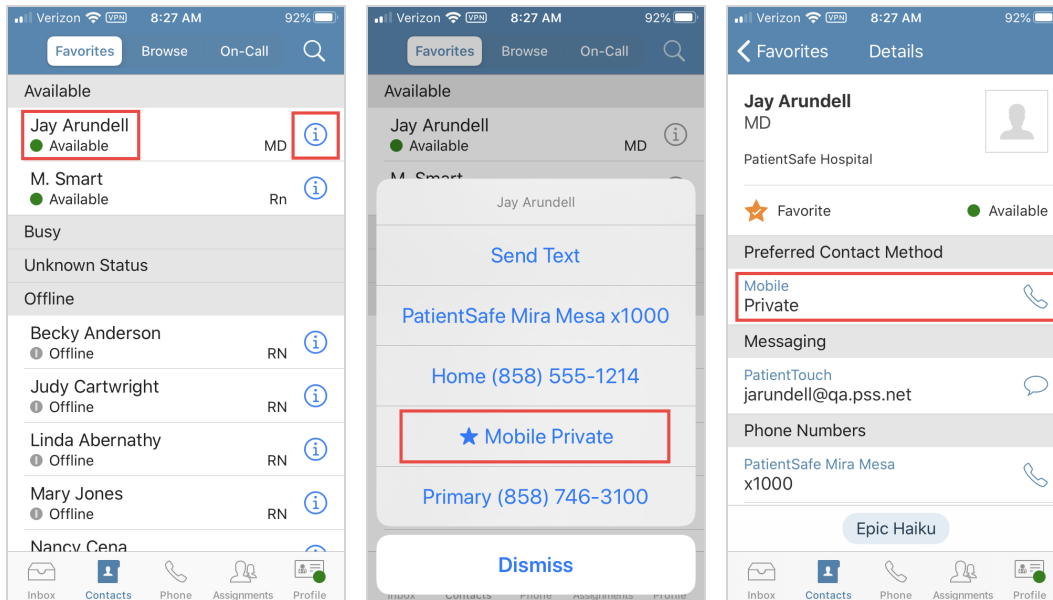
## Receiving a Call



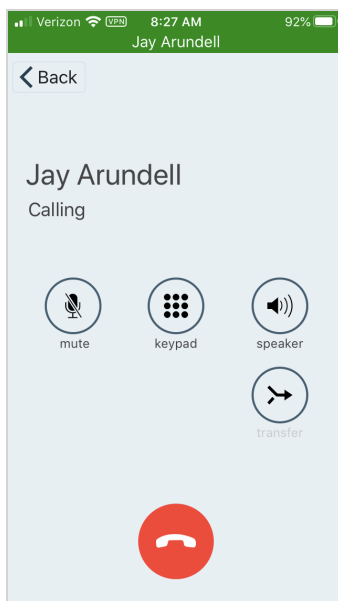
When you receive a call, touch **Accept** or **Decline** to respond.

## Dialing a Private Number

Caregiver's may wish to call another caregiver whose number has been "hidden" or labeled as private. In the screen captures below, Dr. Arundell's mobile phone is listed as private. Users who wish to call him may do so using the instructions below.



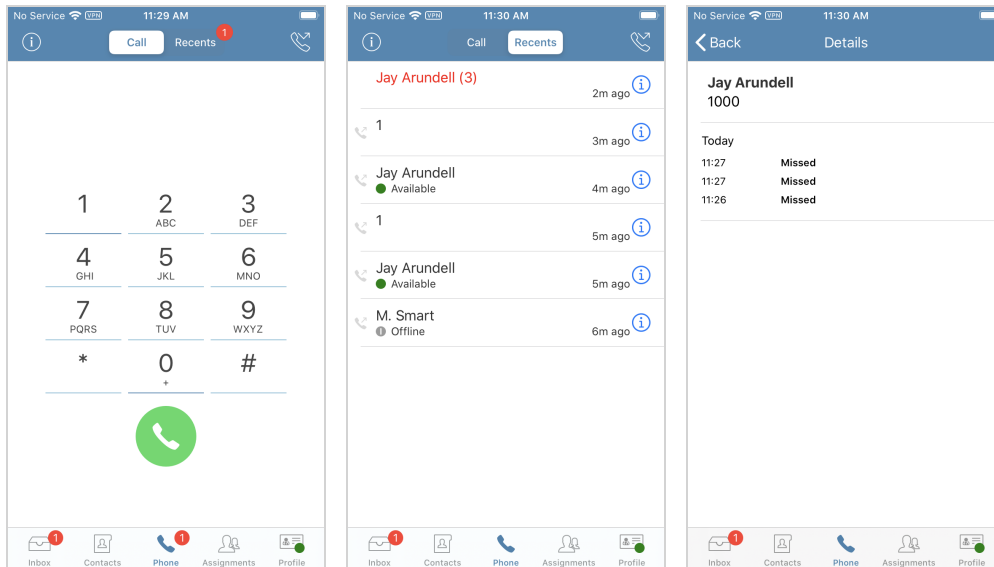
1. From **Contacts**, touch the caregiver's name or Info icon.
2. Touching the caregiver's name brings up an action sheet with the contact information.
3. Touch Mobile Private to place your call.
4. Or, touch the **Info** icon to bring up **Contact Details**.
5. Touch the Mobile Private to place your call.



6. The application calls Dr. Arundell's private number.

## Recents and Missed Calls

Vocera Edge Communications provides a log of recent and missed phone calls. "Recents" and the Phone badge count increases with each missed call.



1. Touch **Recents**.

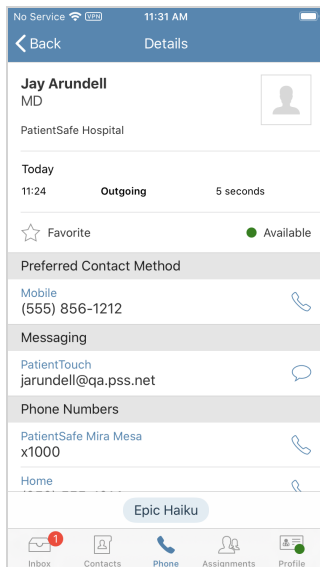
3. All of the recent calls display.

4. The top of the screen indicates the user has 3 missed calls from the same caregiver.

5. Touch the Info icon (i) to see details.

6. The log indicates the name of the caregiver who called and time of each missed call.

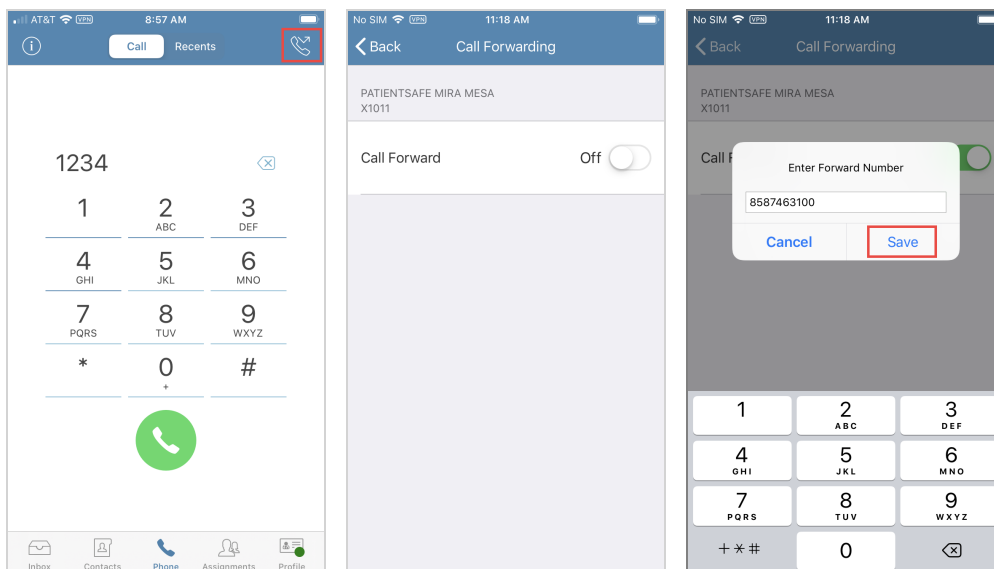




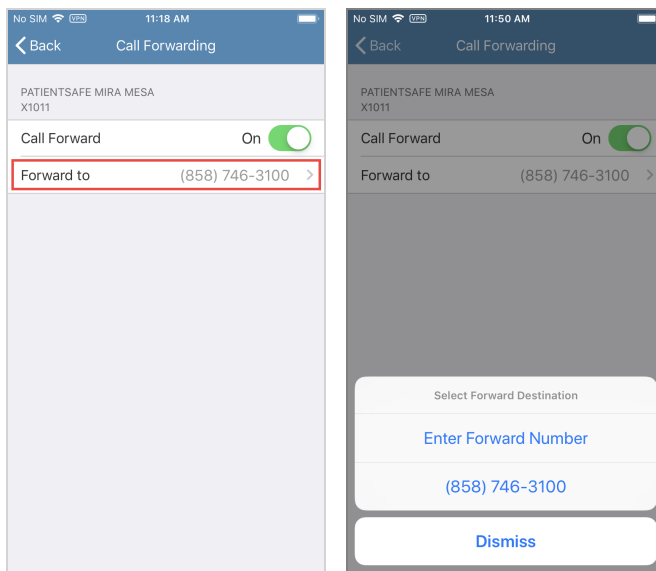
7. Touch the Info icon (i) again to see contact details.
8. Touch any of the methods available to communicate.

## Call Forward

Hospital issued shared devices have VoIP capabilities and you can use them to forward calls. Please use the instructions below to learn how to forward missed calls to a designated phone number.



1. From the Phone tab, touch the **Call Forwarding** icon.
2. Toggle **Call Forward** to **On**.
3. Enter the phone number you want all missed calls routed to.
4. Touch **Save**.

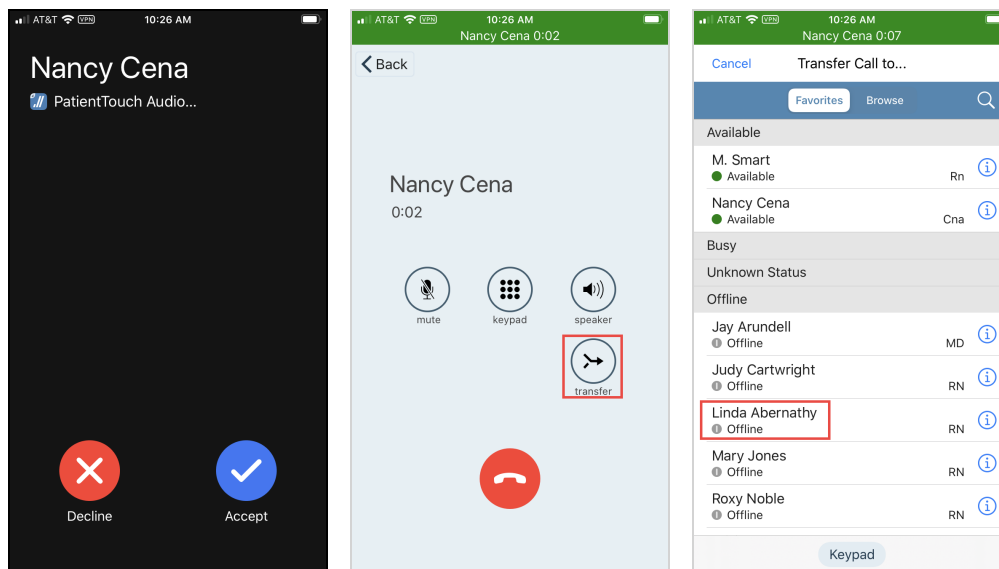


5. Touch the call forward number.

6. You may modify the number.

## Call Transfer

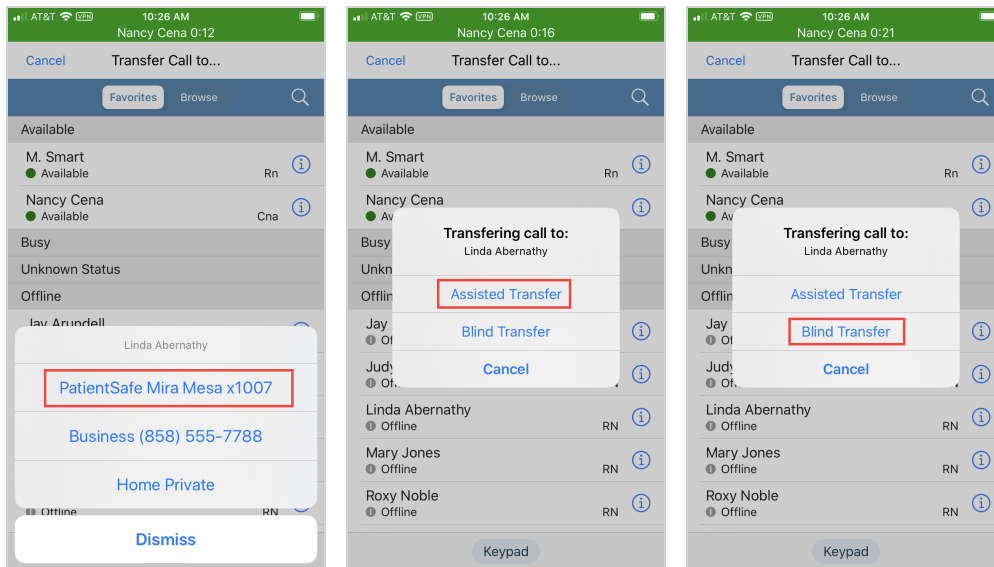
Hospital issued shared devices have VoIP capabilities and you can use them to transfer calls. Please use the instructions below to learn how to transfer a call to another caregiver.



1. When a call comes in, touch **Accept**.

2. Touch **Transfer**.

3. Touch the contact name or select the Info icon.



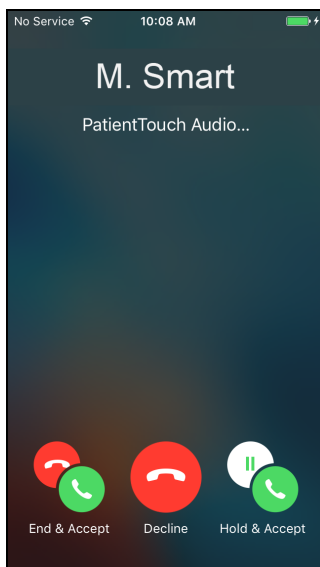
4. Touch the number you wish to transfer the call to.

5. Touch **Assisted Transfer** to place the original call on hold to allow for an introduction to the transferred call.

6. Touch **Blind Transfer** to send the call immediately to the other caregiver.

## Call Waiting

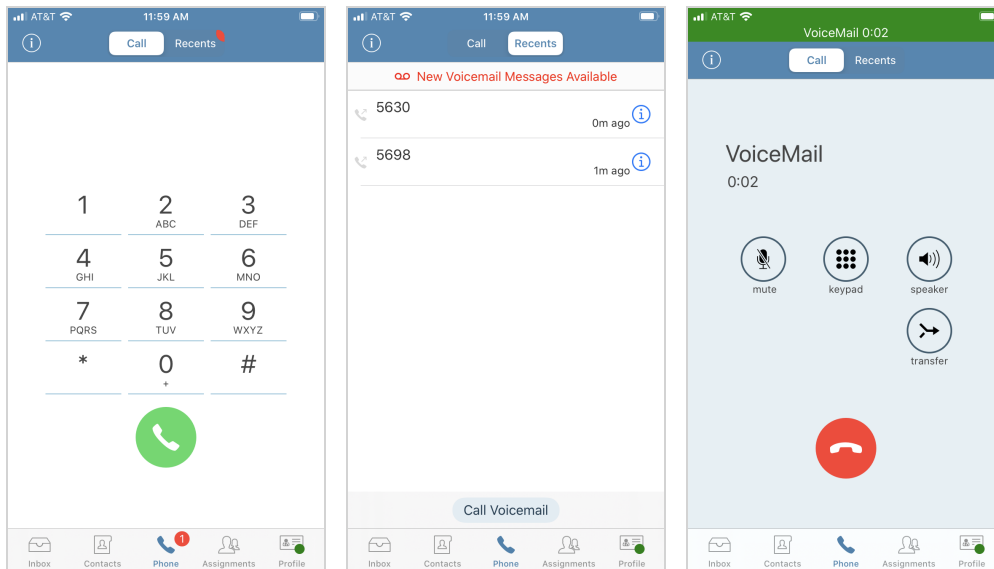
Hospital issued shared devices have VoIP capabilities and you can use them for the call waiting feature. Users will be able to receive an incoming call when already on a call. The incoming call can be received at any time there is less than two callers connected. Users will see the screen shot below when on a call and another call comes in. Touch the call buttons provided to answer the call/place the call on hold.



## Voice Mail Indicator

Users with VoIP capabilities may have voicemail messages. Users will receive a banner in the Phone tab and their badge count will increase according to the number of new voice mail messages. Please follow the instructions below to learn how to access voicemail.

### Voicemail Banner



1. Touch **Recents**.

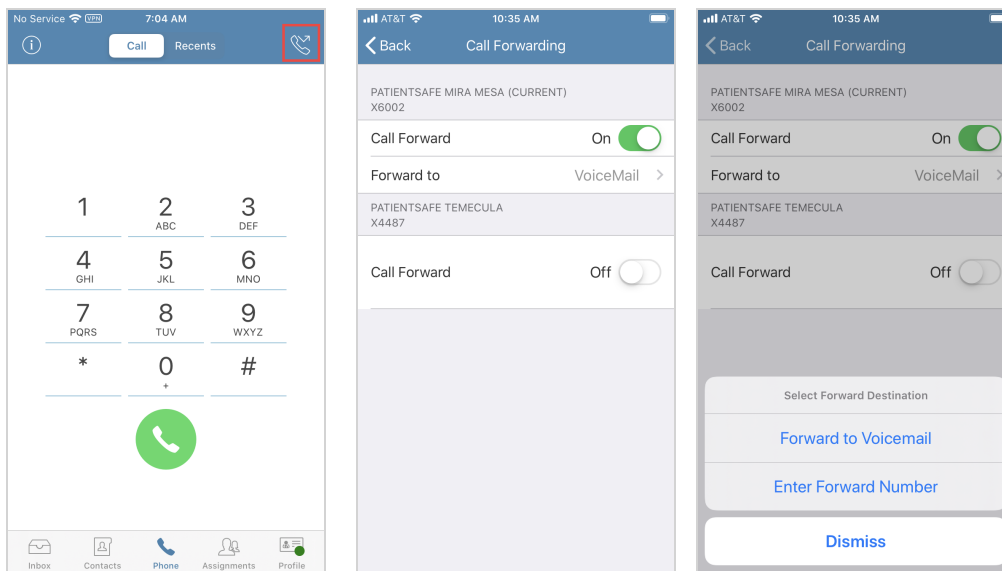
3. Touch the banner on the top of the screen or touch **Call Voicemail** to access your voice mail box.

**Note:** The voicemail banner is no longer available if you navigate away from the Recents tab.

4. When calling voicemail, you will hear a message asking for identification information prior to accessing your messages.

5. Touch the **Keypad** to enter the data and retrieve your messages.

## Forward Calls to Voicemail



Users can forward calls to voicemail.

1. Touch the **Call Forwarding** icon.

2. Touch **Forward to**, to set or change your configuration.

3. Touch **Forward to Voicemail** to have your calls forwarded to your voicemail box.

4. Touch **Enter Forward Number** to enter a phone number to have your calls forwarded to.

## Cellular Calling

### Placing & Receiving a Call

#### Background

When Cellular Calling is enabled, all VoIP service features (Call Forwarding, Recents) will be disabled. Users can only dial 10 digit DID phone numbers when on a cellular calling plan. For example, if you want to dial another caregiver's extension, dial the entire 10 digit number (the "1" is optional). If you want to dial 4 digit extensions, see Extension Dialing below.

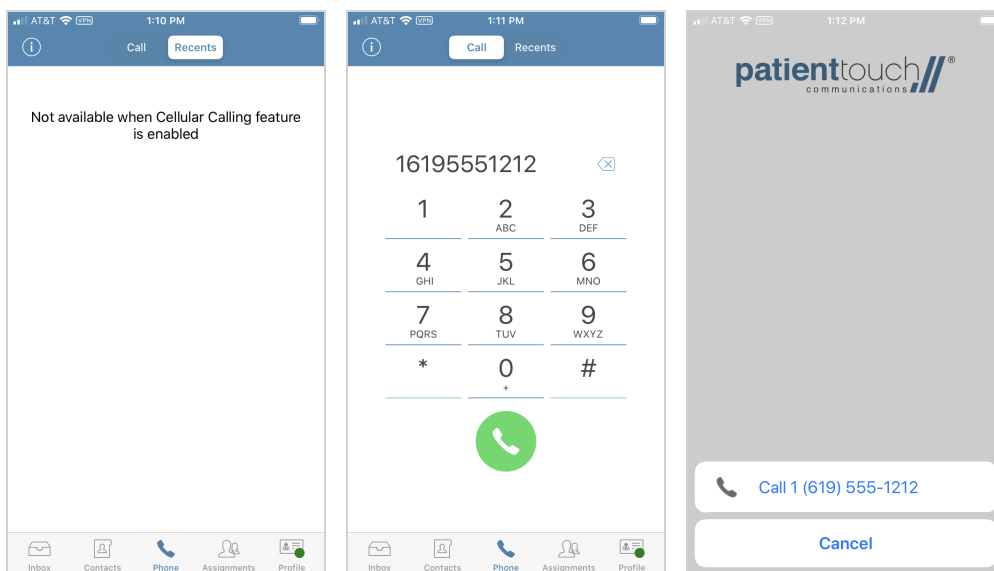
#### Configuration

If you belong to a facility where users want to make and receive phone calls using their native cell phone carrier, contact your hospital's IT department to configure your phone settings. Cellular Calling must also be enabled in Enterprise Manager.

#### User Experience

Please follow the instructions below to learn how to place and receive a call using cellular.

## Sender

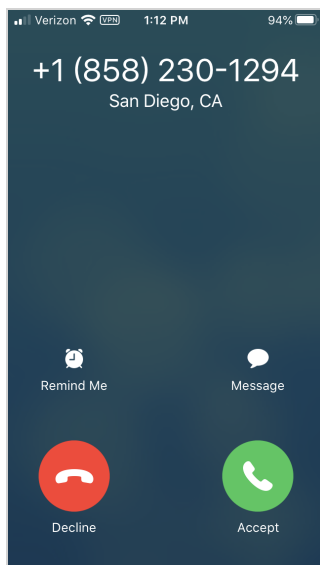


1. Recents is disabled when cellular calling is enabled.

2. Dial the 10 digit DID phone number and touch the **Call** icon.

3. Touch the phone number on the action sheet to place the call.

## Receiver



When you receive a call, touch **Accept** or **Decline** to respond.

## Extension Dialing

### Background

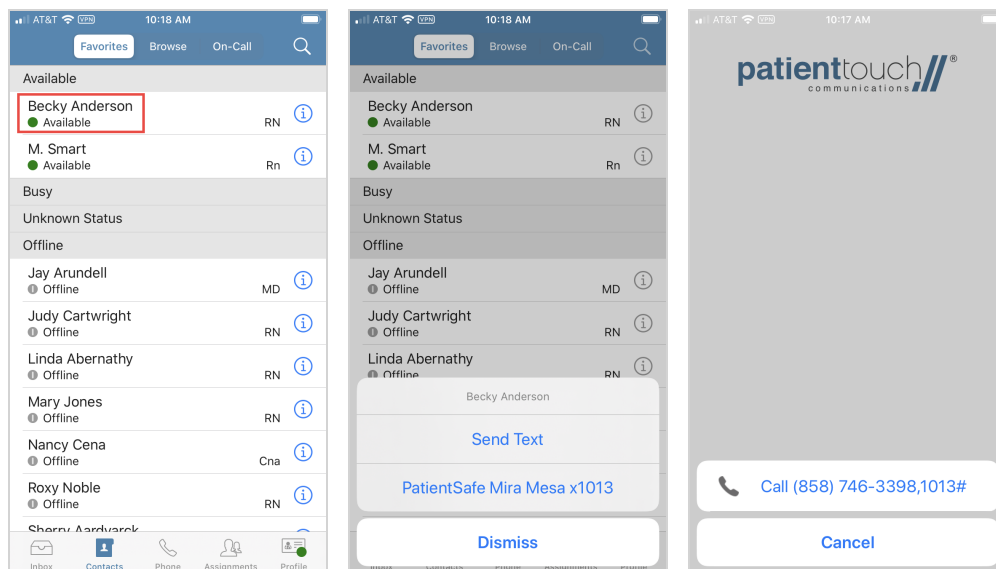
When dialing 4 digit extensions using cellular calling, caregivers will receive a Vocera Edge prefix plus the 4 digit extension when dialing. The prefix is configured when setting up Extension Dialing and should be considered as part of the number {(858) 746-3398, 1013# in the example below}.

### Configuration

Extension Dialing must be configured in Enterprise Manager. Contact your hospital's IT department for configuration. Prefer Cellular Calling must also be enabled on your device. Once configuration is in place, users can dial 4 digit facility extensions.

### User Experience

Please follow the instructions below to dial 4 digit extensions.



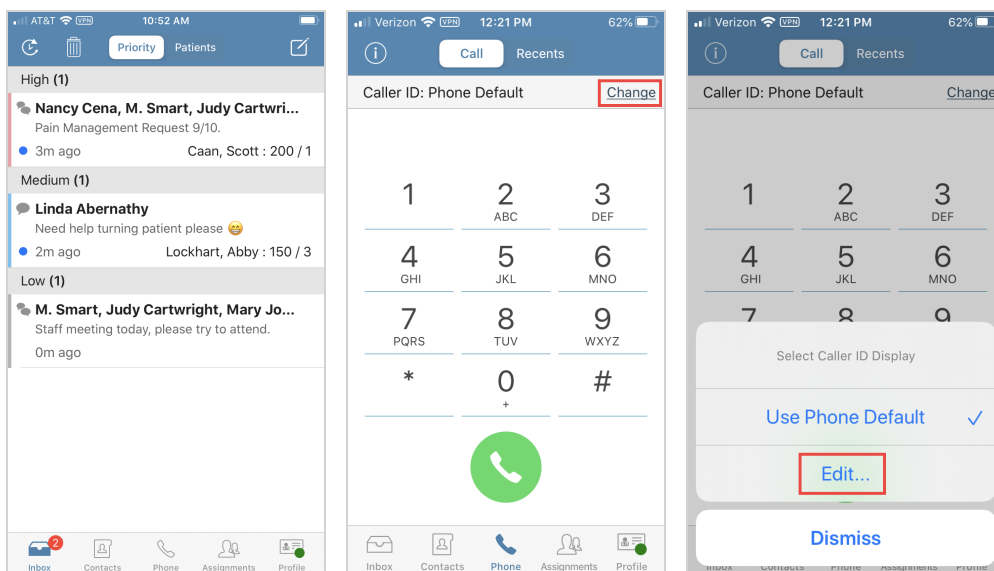
1. From Contacts, touch the caregiver's name.
2. Touch the 4 digit extension number (x1013).
3. Touch the phone number that displays to place your call.

## Custom Caller ID

Please contact Vocera Edge Technical Support or Interface Group regarding Twilio integration for SMS Paging and Custom Caller ID.

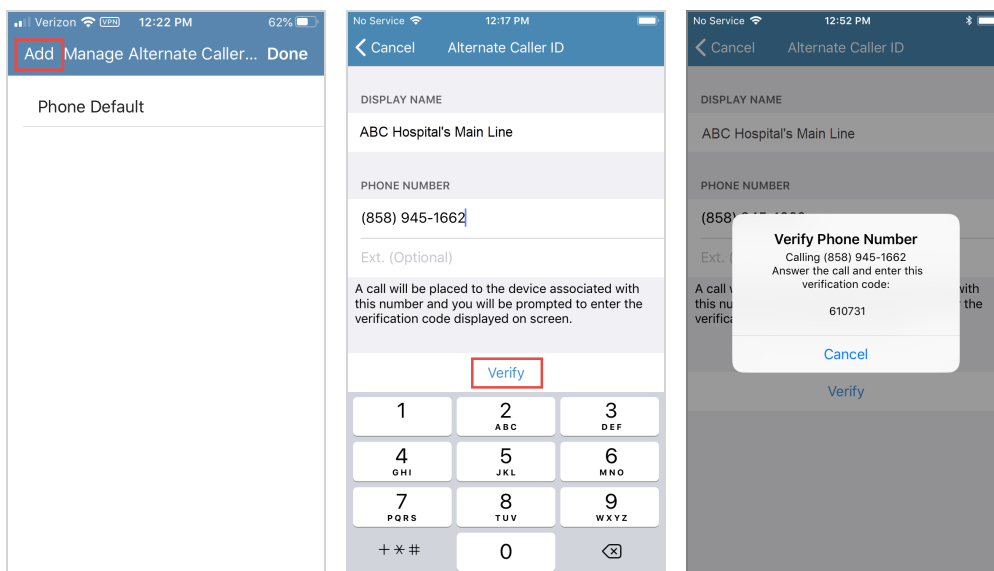
Users, for example physicians or hospitalists, may want to have their phone numbers "hidden" when placing a call for privacy reasons. With the Custom Caller ID feature, users can choose to display a different phone number, such as the clinic or hospital main line. Users must have the Set Alternate Caller ID permission to use this feature.

Please use the instructions below to configure Custom Caller ID.



1. Touch the **Phone** tab.
2. The phone number in this example is set to display the original default value.
3. Touch **Change** to enter a new number to display instead.
4. Touch **Edit**.





5. Touch **Add**.

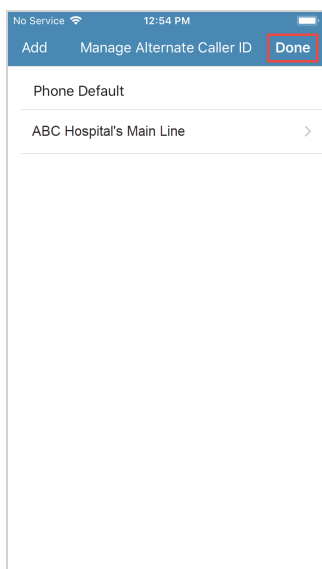
6. Enter a display name, which may be the clinic or hospital. The display name is for the caller's use only.

7. Enter the phone number to display, which might be the clinic or hospital main line.

8. Touch **Verify**.

9. Vocera Edge Communications calls the second phone, which is the number you entered.

10. Answer the call and enter the 6 digit code that displays on screen.

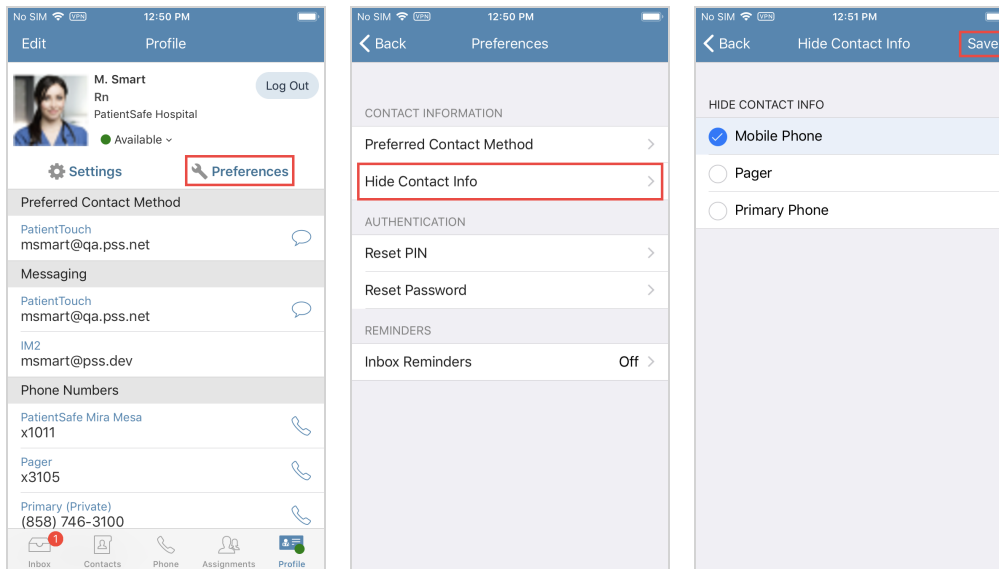


#### 11. Touch **Done**.

When placing calls the new phone number will display on screen.

## Hide Contact Information

This feature provides users with the ability to hide their personal contact information while still remaining accessible through the application. For example, physician's and executives may not want other caregivers to see their private phone number. However, they may still want to be contacted via those means when they are logged into the application. Users can hide their contact information from other users with the Profile tab and the Hide Contact Information permission. At this time, phone numbers are the only method of contact you can hide. Please use the instructions below to hide your phone number(s).

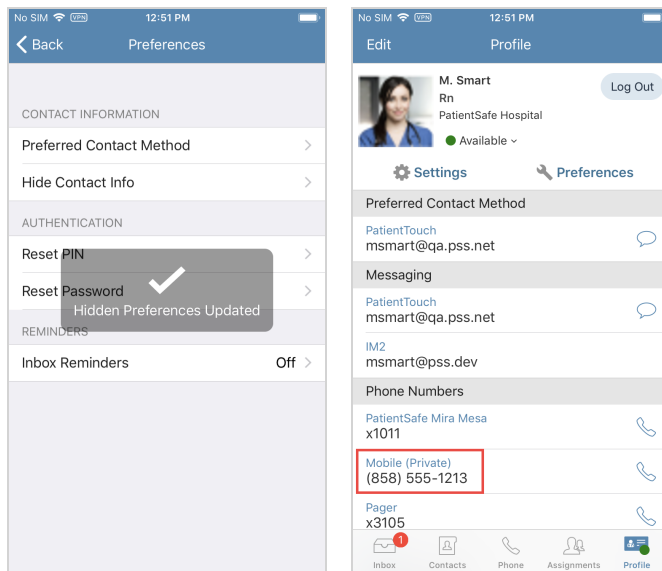


1. Touch **Preferences**.

2. Touch **Hide Contact Info**.

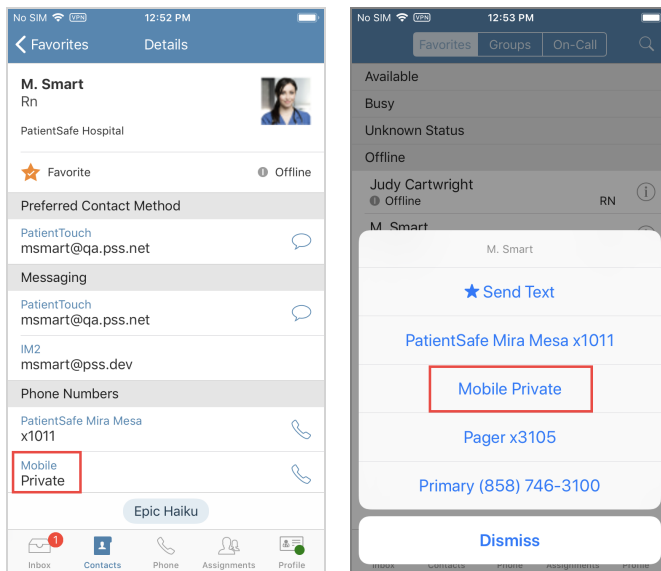
3. Select the phone number (s) you wish to hide from other users.

4. Touch **Save**.



5. A message displays indicating the hidden preferences have been updated.

6. The hidden contact information displays as "**Private**" to the user on their own **Profile** screen.



1. In addition, the **Contact Info** screen of *another user* displays the "**Private**" label to indicate the contact information is hidden.

2. If this user touches the Phone icon to make a call, the call will go through but the phone number will remain private.

3. When users touch M. Smart's name from the list of **Favorites**, the action sheet also displays the "**Private**" label.

## Video Calling

### Background

Video calling introduces a new way of reaching caregivers and patients, creating a virtual care experience. Video can enable face to face calling with patients in isolation, connect caregivers across locations and provide real-time context of ongoing situations.

For example, a physician who is at home can call a nurse in the hospital to check on a patient in isolation. The nurse can bring their smartphone into the patient room to visually show the patient to the physician, or hand the device to the patient. This allows the physician to communicate with the patient from outside the hospital, reduces the need for the physician to don PPE and enables a face to face conversation between physician and patient.

Video may be used to initiate a one-to-one video chat or a group video conference. Additional caregivers can be added to ongoing calls. All of these examples are described below.

### Configuration

In order for caregivers to initiate video calls, they must meet the following requirements. Users must:



- have a smartphone (iOS/Android) on Vocera Edge 4.9 or above
- have the Enable Video Calling permission enabled on their caregiver profile in Enterprise Manager

In order to receive a video call, users must:

- have a smartphone (iOS/Android) on Vocera Edge 4.9 or above
- be logged in to receive video calls

In addition, the facility must contact Vocera Edge Technical Support to configure Twilio integration for Video Calling.

## User Experience

### Navigation

Use the controls on the top and bottom of the screen to navigate calls.

#### Top

From left to right:

Touch Back to return to the previous screen

Touch "camera" icon to turn camera on/off

Touch "pin" icon to pin a caregiver to the center of the screen

Toggle "speakerphone" icon to switch between using the speakerphone or the phone's microphone/headphones. See table below.

View the network connectivity icon to diagnose bad network connections.

#### Bottom

From left to right:

Touch "i" icon to see who is in the call

Toggle "sound" icon to turn sound on/off

Touch "end call" icon to end the call

Touch "video" icon to turn video on/off

Touch "+" to invite caregiver to the call



### Speakerphone/mic/headphone Icon Descriptions



Speakerphone icon displays by default. This provides users with the ability to hear video calls using the phone's speakers.



Toggle to the microphone icon to hear video calls using the phone's microphone. This allows users to switch to a private video conference.



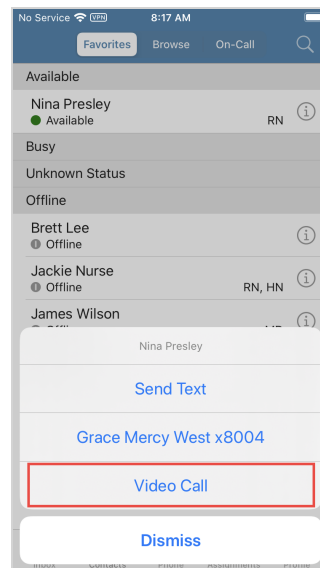
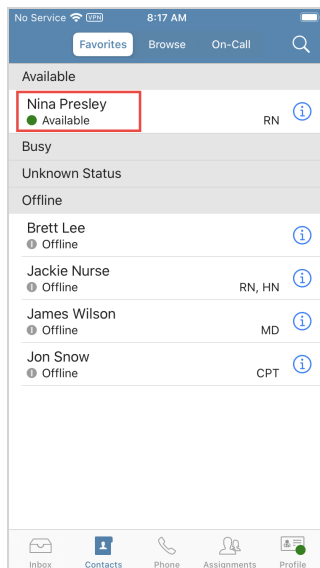
When the user has headphones, the headphone icon displays. Touch the headphone icon to see a pop up menu that allows you to switch between the speakerphone, microphone, or the external headphone device.

## One - to - One Video Calls

### Initiating a One-to-One Video Call

The first three examples below indicate how a video call can be initiated from favorites, touching the compose icon, or by accessing the contact profile. In the below examples, Dr. Anderson is requesting a video call with Nurse Nina Presley.

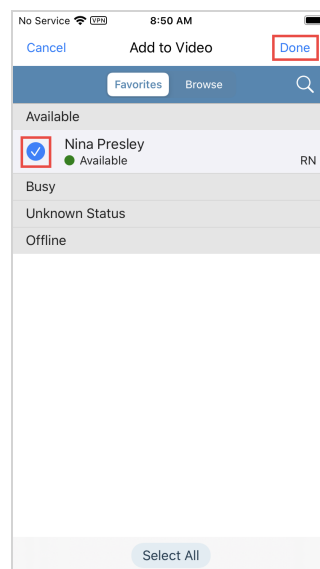
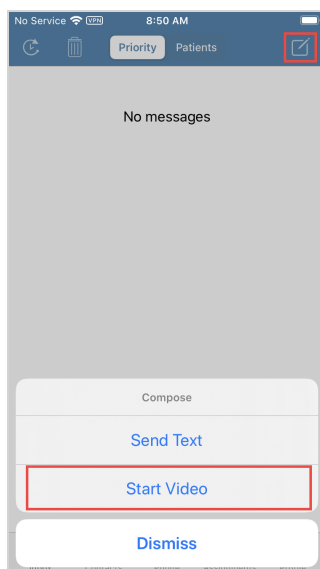
#### *Favorites*



1. From Favorites, touch the caregiver's name with whom you want to initiate a video call.

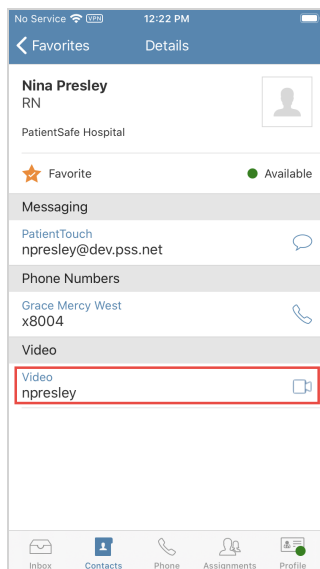
2. Touch **Video Call**.

#### *Compose Icon*



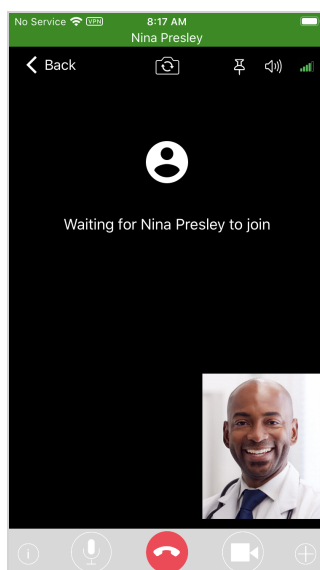
1. Touch the Compose icon, **Start Video**.
2. Touch the caregiver's name with whom you want to initiate a video call.
3. Touch **Done**.

### Contact Profile



1. Touch anywhere inside the red line on the contact profile screen and initiate a video call.

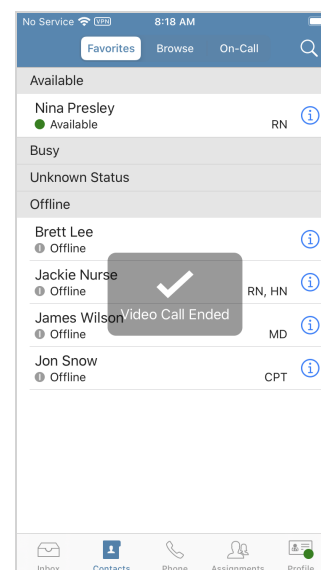
Once the call is initiated, you will be placed into the video call.



1. This screen will be displayed



3. Once the caregiver answers



5. A check mark displays





while waiting for the contact to answer the call.

2. Your image displays in the bottom right.

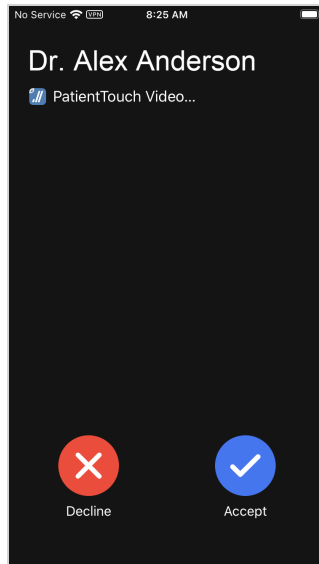
the call, his/her image displays in the center and you may begin the video chat.

4. Touch the **End Call** icon to end the call.

indicating the call has ended.

## Receiving a One-to-One Video Call

From our example, Nina Presley is answering Dr. Anderson's video request.

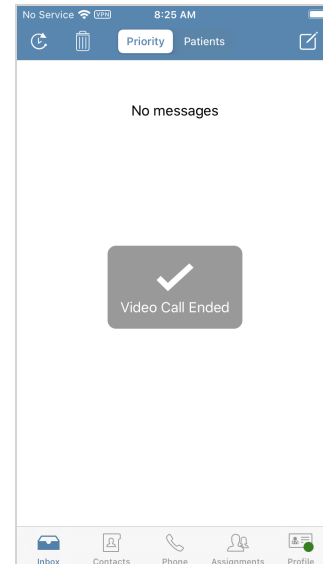


1. Touch Accept to answer the video call.



2. The image of nurse Presley displays in the bottom right while Dr. Anderson displays in the center.

3. Touch the End Call icon to end the call.



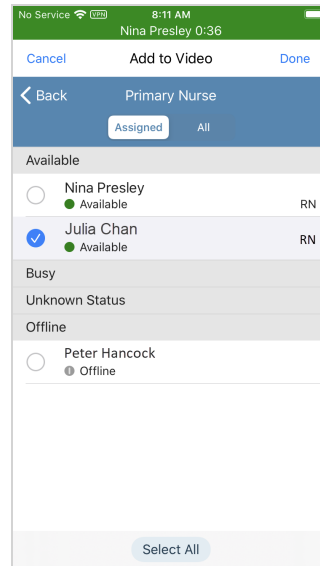
4. A check mark displays indicating the call has ended.

## Adding an Individual to a Video Call

While on a call, users can add one or more individuals to the call.



1. While on a call, click the **plus (+) sign** in the lower right corner to add an individual.



2. Select the individual to add to the call.

3. Touch **Done**.



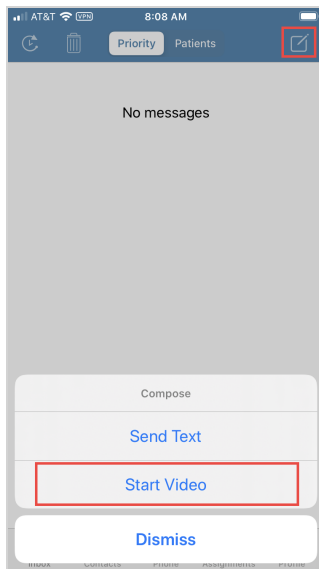
4. The added caregiver displays on screen with the rest of the team.

## Group Video Calls

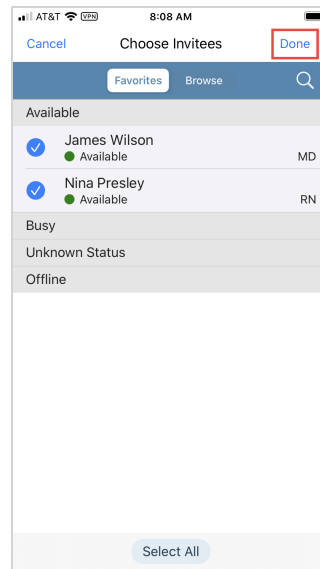
### Initiating a Group Video Call From Favorites

Caregivers may need an urgent meeting with a specialist to review a patient's treatment. However, the specialist may not be able to meet in person. The caregiver can quickly put together a group video call so that the nurse, specialist, and any other qualified caregiver can speak collaboratively on treatment options.

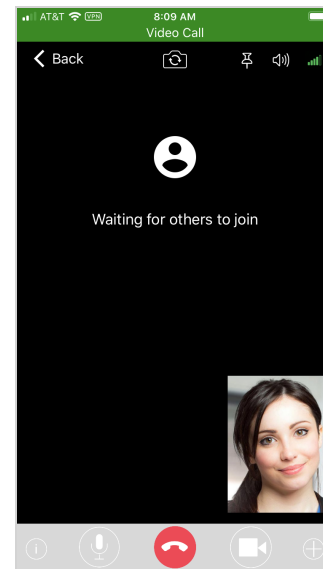
Users can quickly put together a group video call using the compose icon>favorites.



1. From the Inbox, touch the Compose icon, Start Video.



2. Select the names of the specialist and caregiver.  
3. Touch **Done**.



4. Wait for the others to join the video conference.



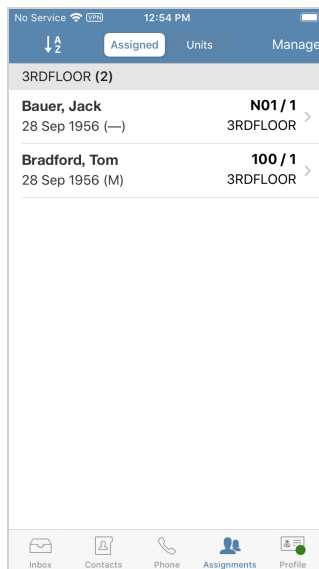
5. When the others join, their images display on screen and you can begin the video chat.



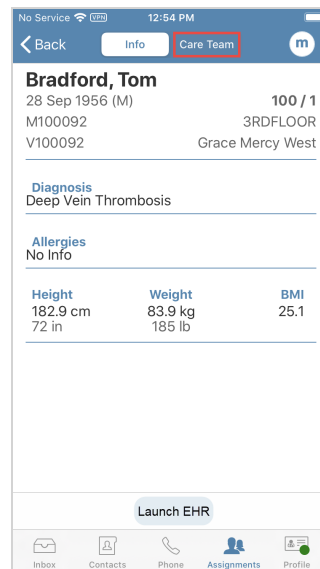
## Initiating a Care Team Video Call

Caregivers may contact a patient's care team using video. These calls can be directly initiated with a single member, or several members of the care team. See the steps below to initiate a care team group call.

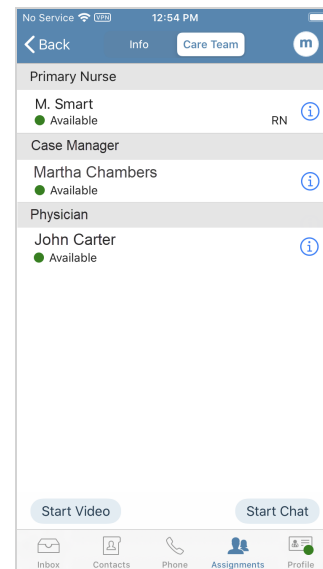
For an example of group video, consider scenarios where some caregivers may be working remotely. A nurse, case manager, and physician may have a group call to sync quickly on discharge steps for a patient.



1. From the Assignments tab, select the patient.

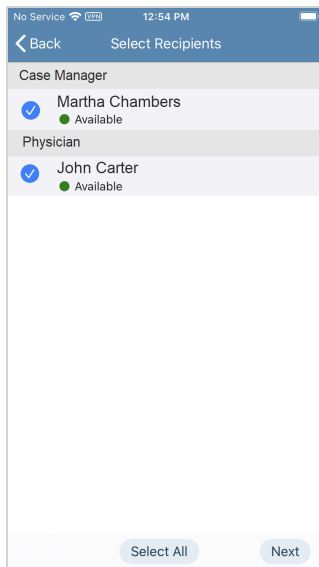


2. Touch Care Team.

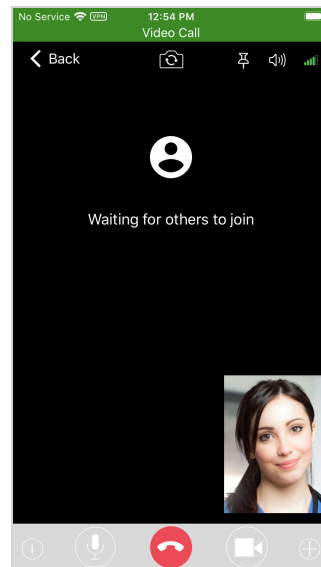


3. All of the patient's care team members display.

4. Touch Start Video.



5. Select the team members and touch Next. Only team members who meet the minimum video requirements and are online will display.



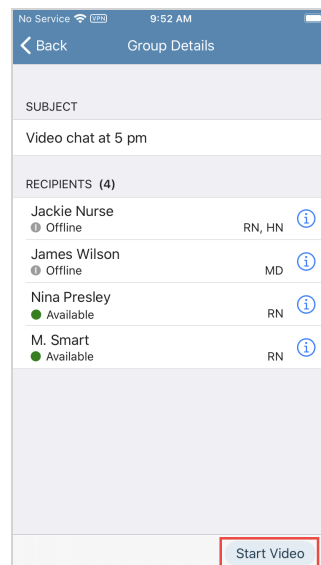
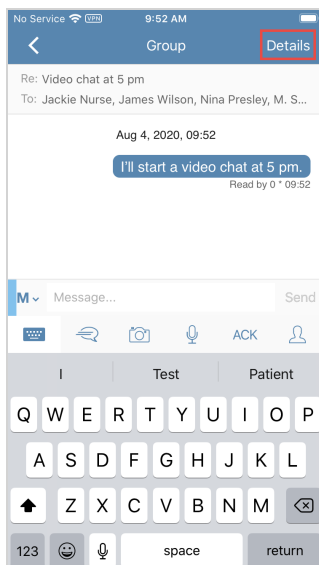
6. Wait for the others to join.



7. When the others join, their images display on screen and you can begin the video chat.

## Initiating a Group Video Call from Message Details

Users can set up a group video call by touching **Details** on the message screen. When ready, touch **Start Video** to initiate the video call.



# Short Message Service (SMS) Paging

## Background

When configured, SMS Paging allows users of Vocera Edge Communications to send a page to non-users (who are in the same hospital enterprise network) in a way that does not violate hospital privacy protocols and HIPAA. For example, Dr. Wilson (Head of Oncology and user of Vocera Edge Communications) may want to consult with Dr. Carter (Orthopedic Surgeon and non-user) for a specific patient.

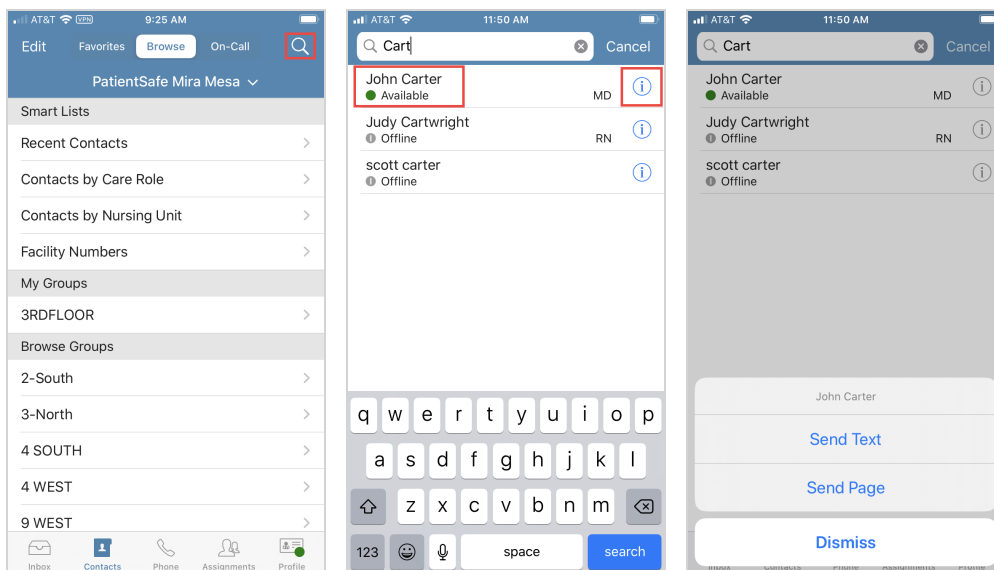
## Configuration

Please contact Vocera Edge Technical Support or Interface Group regarding Twilio integration for SMS Paging and Custom Caller ID. Users must have the Send HIPAA-compliant page permission to use this feature.

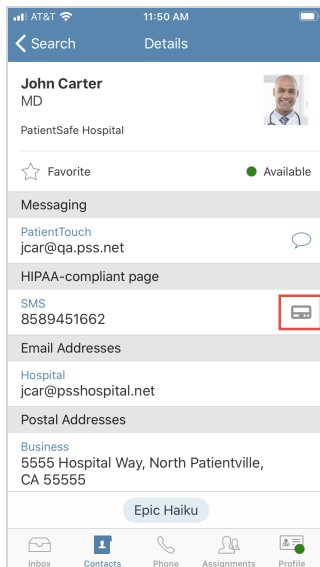
## User Experience

### Sender - Dr. Wilson (User of Vocera Edge Communications)

Please follow the instructions below to send a page.

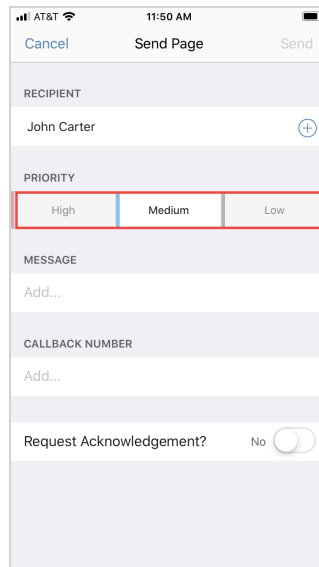


1. From the Contacts tab, touch **Search**.
2. Enter the first few characters of the person's first or last name.
3. Touch the person's name or touch the **Info** (i) icon.
4. When you touch the person's name, an action sheet displays with the contact options.
5. Touch **Send Page**.

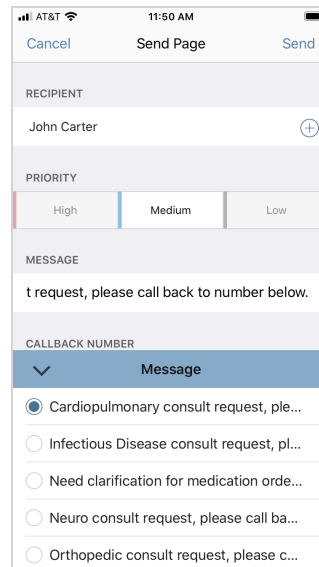


6. Or, if you touch the **Info (i)** icon, Contact Details displays.

7. Touch the **Send Page** icon.

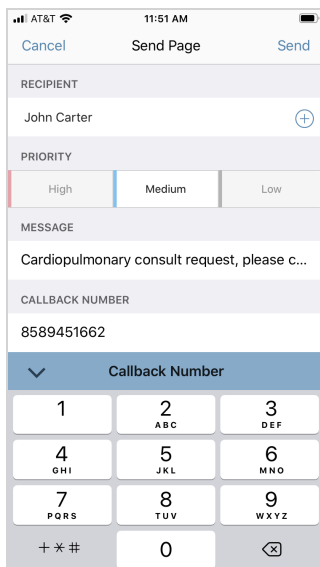


8. Select the **Priority**: High, Medium, Low.

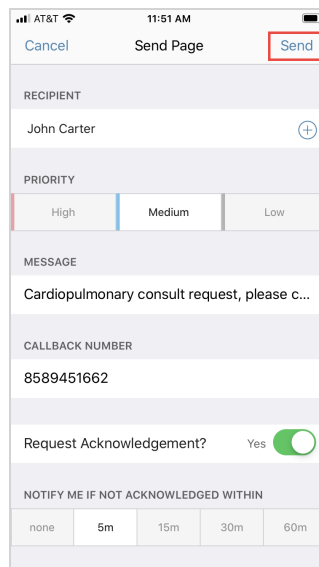


9. Touch the **Message** field to add a quick text message.

10. Touch the **Chevron** icon to dismiss the field.

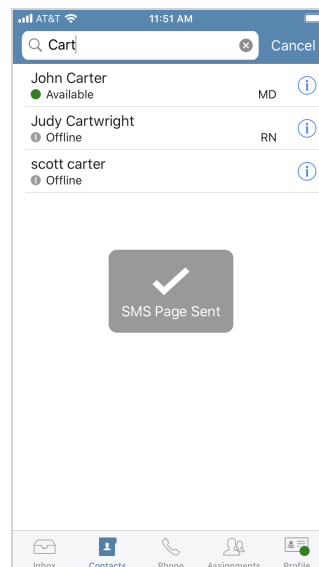


11. Touch the **Callback Number** field to add a callback phone number.



12. Touch **Request Acknowledgment** to receive a notification of when the recipient acknowledges.

13. Touch **Send**.

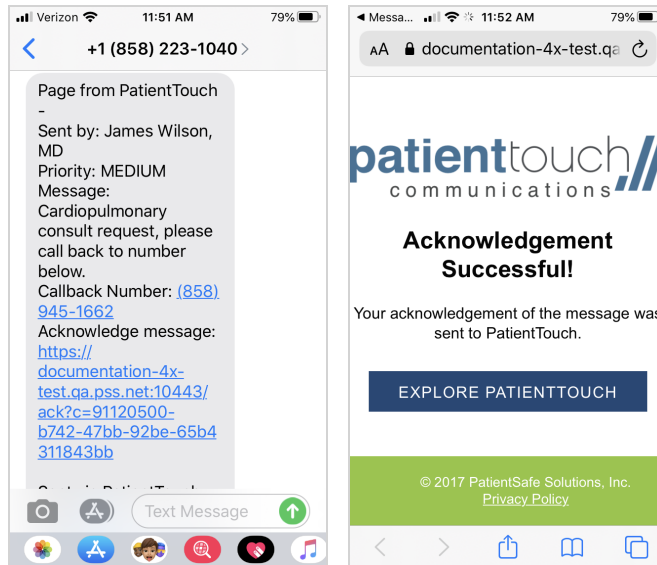


14. An **SMS Page Sent** message indicates a successful page.



## Receiver - Dr. Carter (Non-User of Vocera Edge Communications)

Please review the information below on the process for the recipient of the page.



1. The page displays as a text message on the recipient's phone.
2. Touch the message to acknowledge.
3. A message displays indicating a successful acknowledgment.

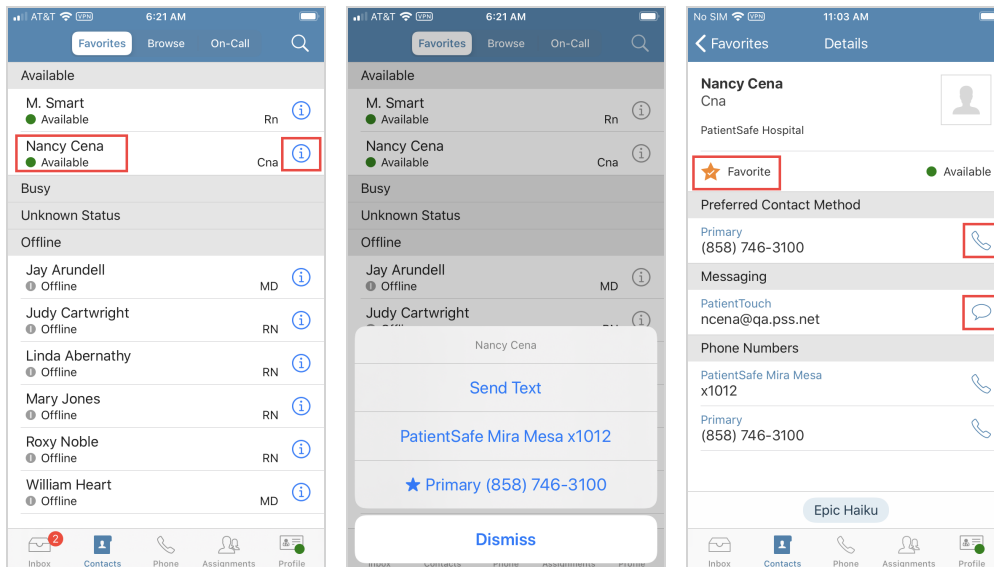
## Contact Directory

### Managing Contacts

The Contacts tab provides a variety of methods for which to contact other users within your facility. If you are in a hospital with multiple facilities, the Contacts tab also provides access to contact information for those facilities.

### Favorites

Favorites allows you to create a list of contacts you frequently communicate with. It also provides quick and easy access to methods of communication for your caregiver favorites.



Favorites displays your list of contacts by status: Available, Busy, Unknown, or Offline.

1. Touch a contact name or the **Info** icon to communicate.

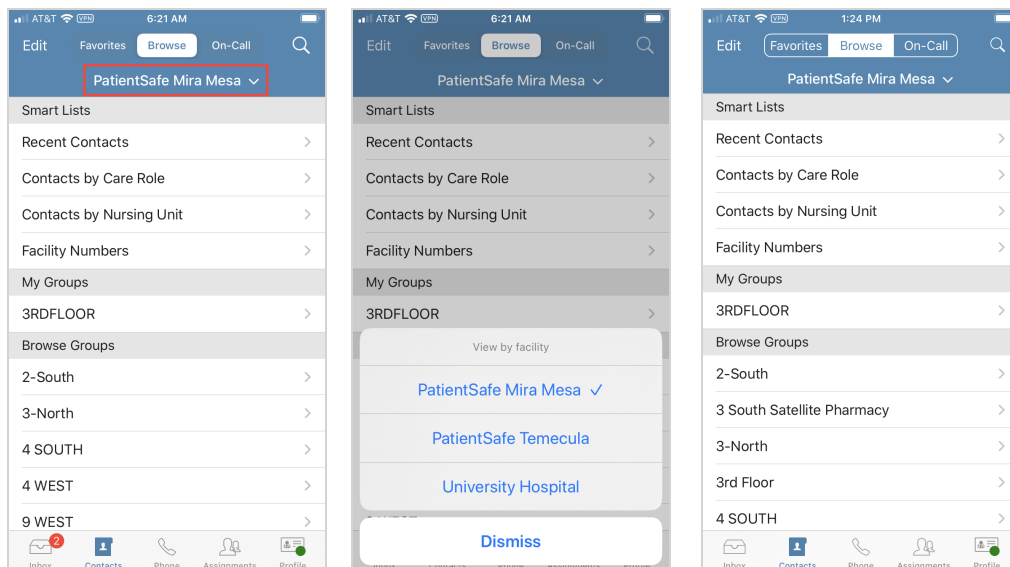
2. Touching a contact name brings up an action sheet with options to send a text or place a call.

3. Touching the **Info** icon brings up Contact Details, where you can add or remove contacts to your **Favorites** by touching the **Star** icon.

4. Touch the options available to communicate.

## Browse

Browse provides multiple options for users to search for and communicate with other caregivers. Please refer to the topic [Managing Browse Groups](#) for additional information.

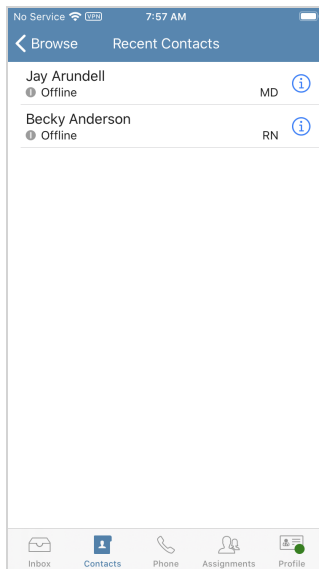




1. Touch the **Facility** drop down menu to select the facility for which you want to locate caregivers.

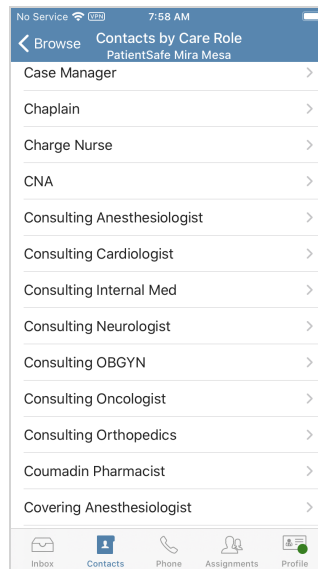
2. Select the appropriate facility.

3. The next four screens provide Smart List search options.



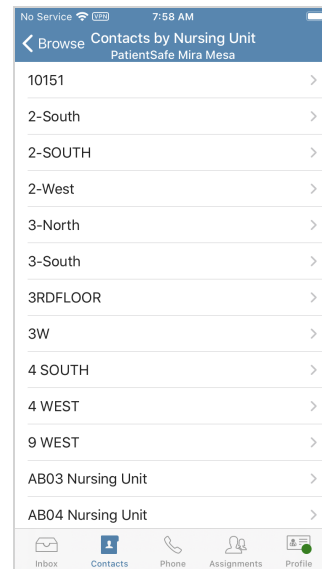
#### Recent Contacts

Displays recent contacts in the last 7 days.



#### Contacts by Care Role

Select a care role to see who is assigned that care role.



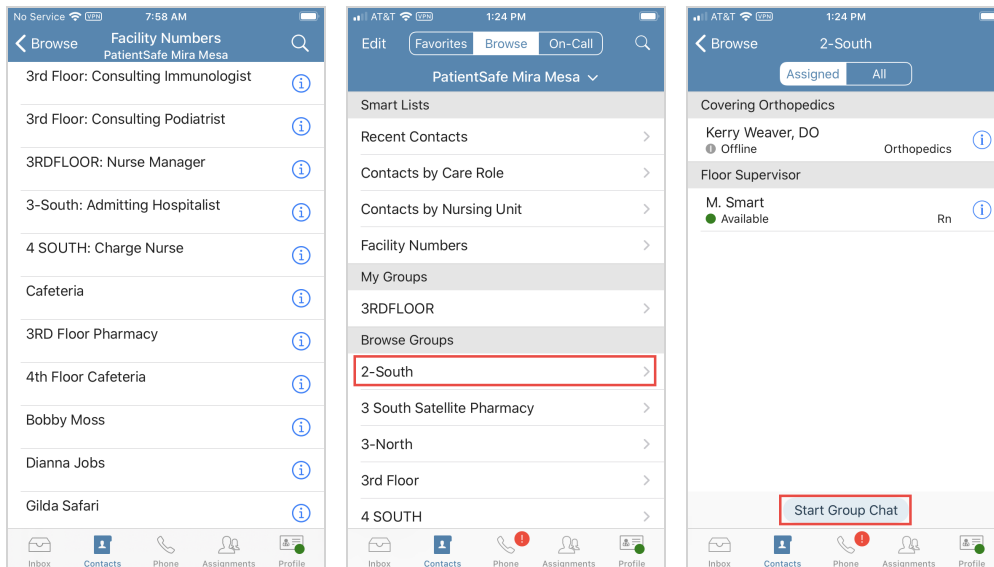
#### Contacts by Nursing Unit

Select a nursing unit to see who is assigned that unit.\*

**\*Nursing units that have been hidden in Enterprise Manager will not display in Contacts by**



**Nursing Unit.**



#### Facility Numbers

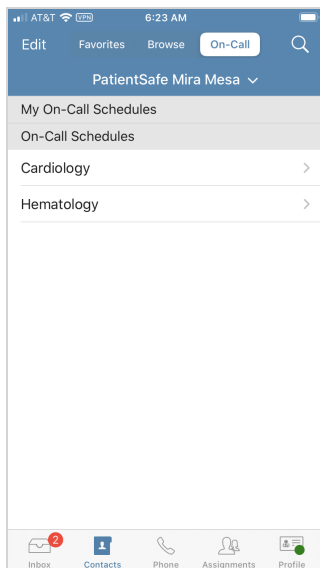
Refer to the next topic, [Facility Numbers](#), for more information.

4. Touch a **Browse Group** to see group members.

5. **Start Group Chat** to communicate.

## On-Call

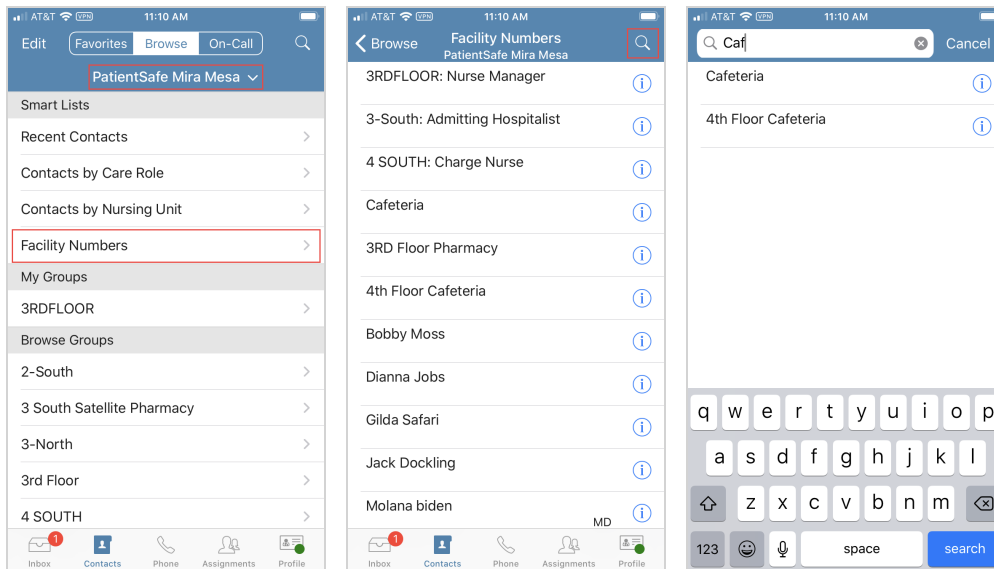
The On-Call Pivot only displays if your facility is configured for on call groups. Please refer to the topic [On-Call Scheduling](#) for more information.



## Facility Numbers

Facility numbers allows caregivers to browse institutional numbers. These are numbers of type address book for care role forwarding in Enterprise Manager. Please follow the instructions below to learn about Facility

## Numbers.



1. Select the desired facility from the **Facilities** drop down menu.

**Note:** The Facility menu will not display if your hospital is a single facility.

2. Touch Browse > **Facility Numbers**.

3. Touch the contact name or **Info(i)** icon to see details.

4. Touch the **Search** icon to locate a contact within the selected facility.

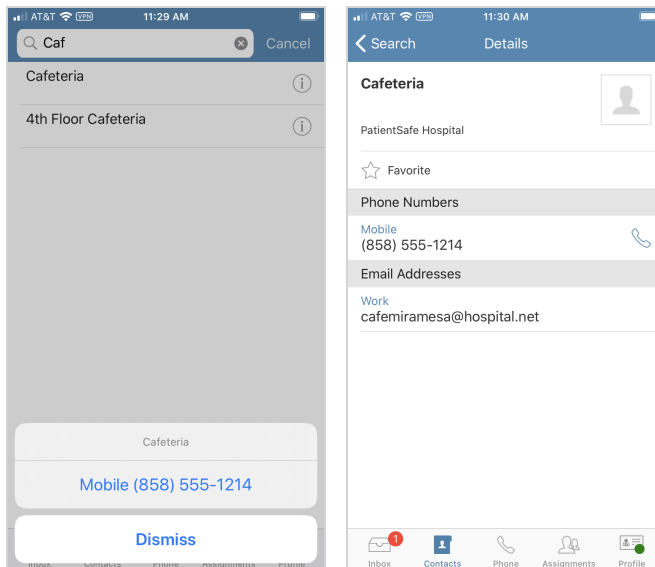
5. Enter the name of the contact you are trying to reach.



Clicking the magnifying glass (search icon) within facility numbers will return numbers only within that facility.



Clicking the magnifying glass (search icon) outside of facility numbers will universally search across all contacts. This search returns a mix of caregivers, address book entries and care role forwarding numbers.

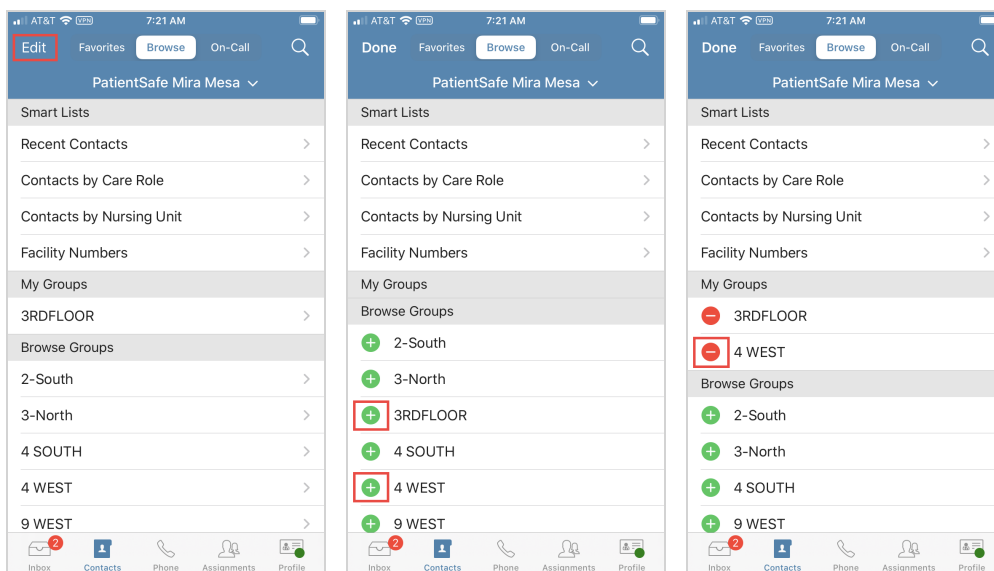


6. Touch the contact name to display an action sheet with contact data.

7. Touch the **Info** (i) icon to see contact details.

## Managing Browse Groups

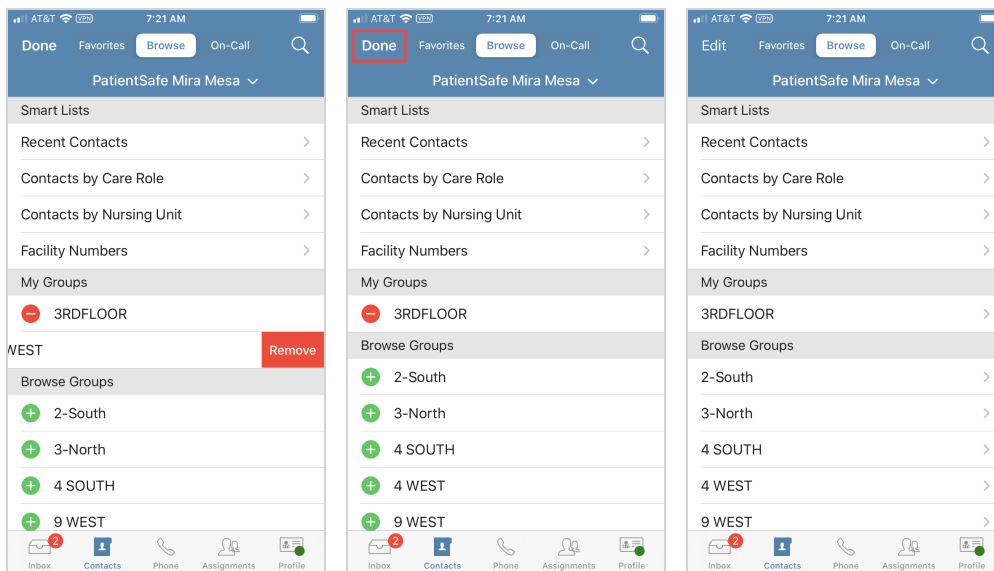
If configured, **Browse Groups** displays organization units like teams or on-call providers. **My Groups** provides quick and easy access to all of the teams you want to locate.



1. Select **Contacts>Browse**.  
2. Touch **Edit**, which allows you to insert a group under **My Groups**.

3. Touch the green insert buttons next to the groups you want to add to **My Groups**.

4. The selected units display.  
5. Touch the red remove button to remove a group.



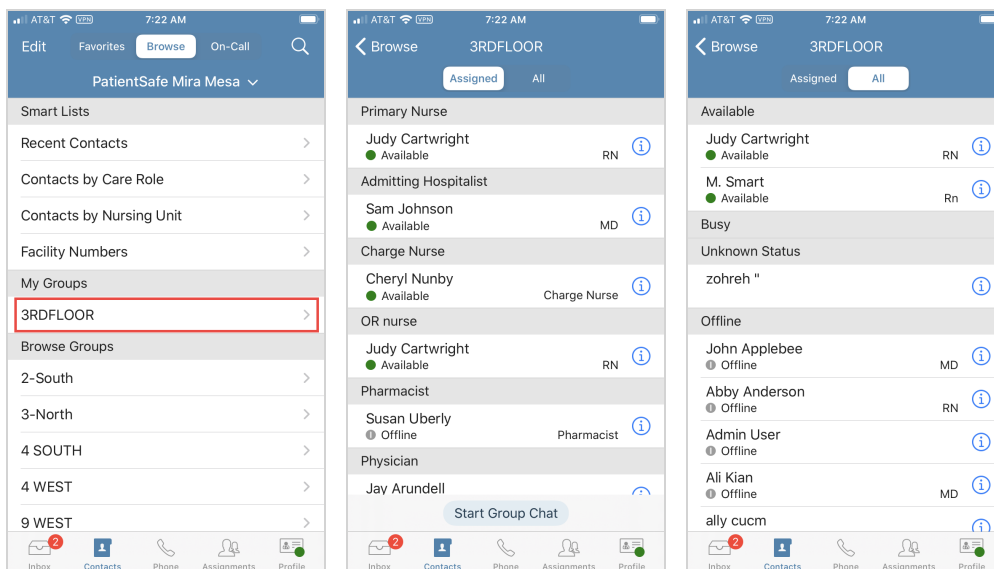
6. Touch **Remove**.

7. Touch **Done**.

8. The group displays under **My Groups** for easy access.

## Assigned & All Pivots

Vocera Edge Communications provides the **Assigned** pivot to view "assigned" caregivers in a Care Role, Nursing Unit, or Browse Group. The **All** pivot allows users to view "all" caregivers who could be assigned to one of these groups.



1. Touch the desired **Browse Group**.

2. The **Assigned Pivot** displays all of the assigned members of 3RDFLOOR.

3. The **All Pivot** displays all caregivers who *could* be assigned to this unit.

## On Call Scheduling

### Background

On Call Schedules are for system administrators and schedulers. This feature lets organizations configure an integration with an on-call scheduling system such as AMiON.

Vocera Edge Communications On-Call Schedules allow caregivers to easily find who is currently on-call as well as look ahead to future on-calls for the next shift and the next few days after. Caregivers who go on-call can also see their own schedule within the app.

If your site is setup for **On Call Scheduling**, you will see the **On-Call** pivot at the top of the Contacts screen. If your site is not setup for On Call Scheduling, you will only see Favorites and Browse.

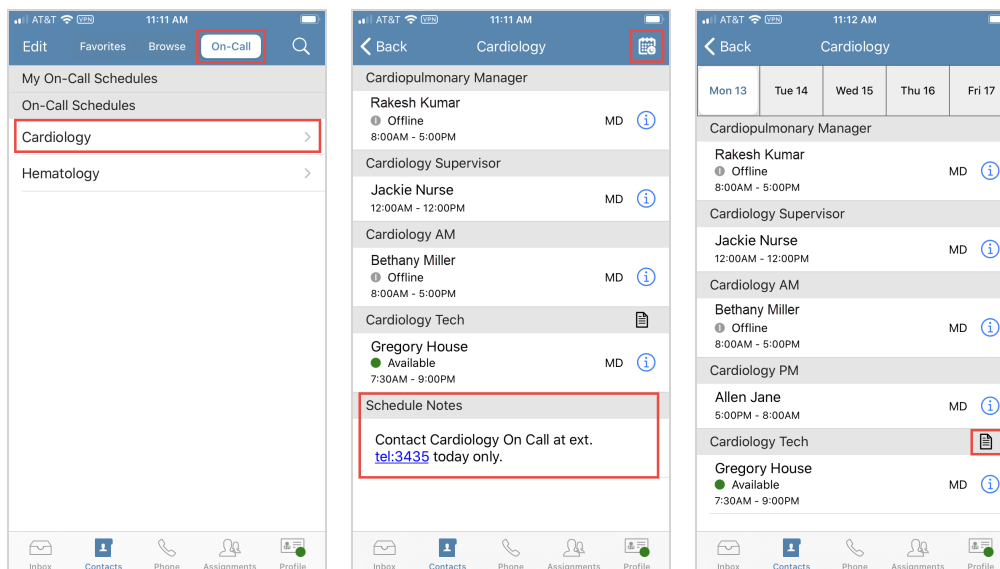
### Configuration

You must have On-Call Integration configured in the Enterprise Manager to use this feature. Please contact Vocera Edge Technical Support team for more information.

### User Experience

To learn more about On Call Schedules, please follow the instructions below.

#### Contacts Tab



Select the schedule you want to view from the list.

1. Touch **Cardiology On Call**.

2. A list of caregivers who are currently on-call display.

3. If there are any **Schedule Notes**, they display here at the bottom of the screen.

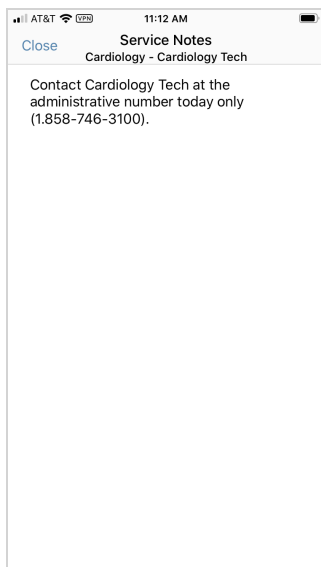
4. Touch the **Calendar** icon to see who will be on call next.

5. The calendar displays who will be on call for that day plus the next four days.

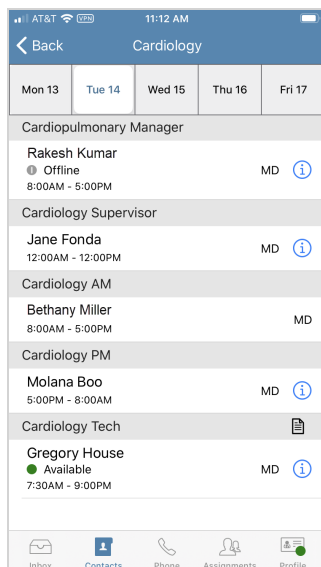
6. Touch a name or Info (i) icon to communicate.

7. Touch the **Service Note** next to Cardiology Tech to read it.





8. The **Service Note** indicates where to call the caregiver. Service notes will vary per facility.



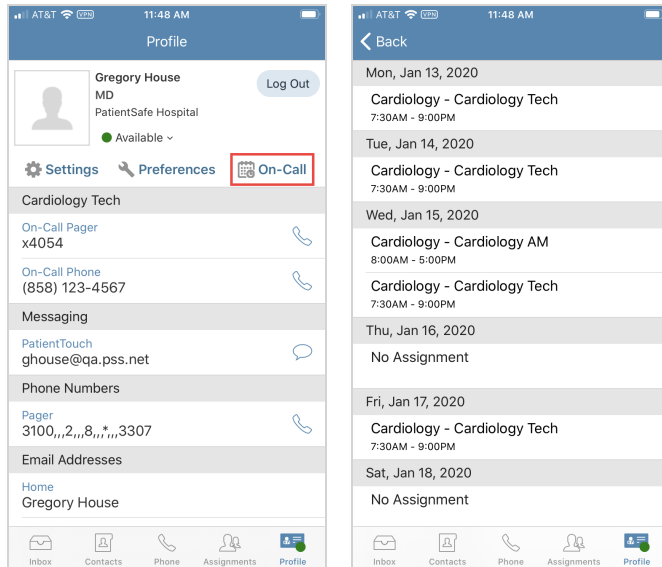
9. Touch the next day (Tue 14) to see who is on call that day.

**Note:** If a shift has ended, the contact data for that user will be grayed out.



## Profile Tab

Physicians, or anyone else who has on call responsibilities, can view their own schedule. Users will see **On-Call** at the top of the **Profile** screen.

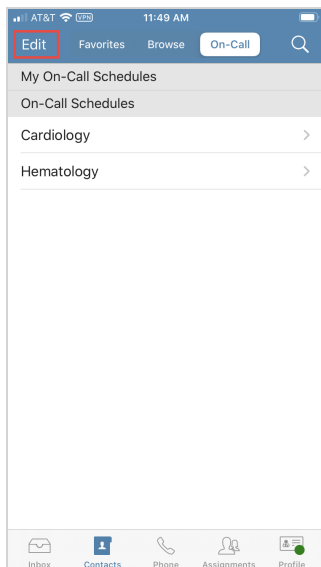


1. Touch **On-Call**.

2. The physician's schedule displays.

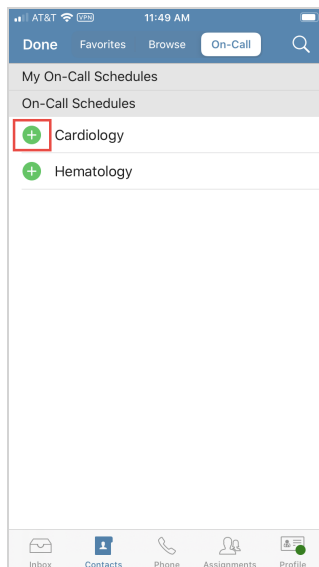
## My On-Call Schedules

**My On-Call Schedules** provides quick and easy access to on-call schedules that you frequently view.

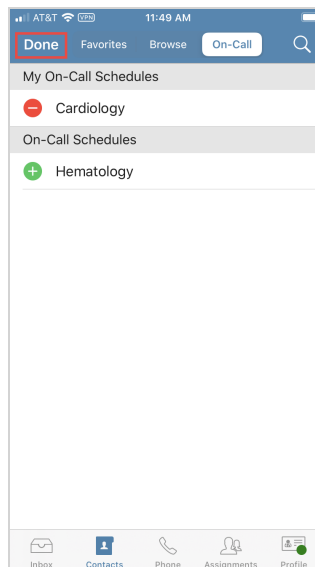


**Edit** allows you to insert a schedule under **My On-Call Schedules**.

1. Touch **Edit**.

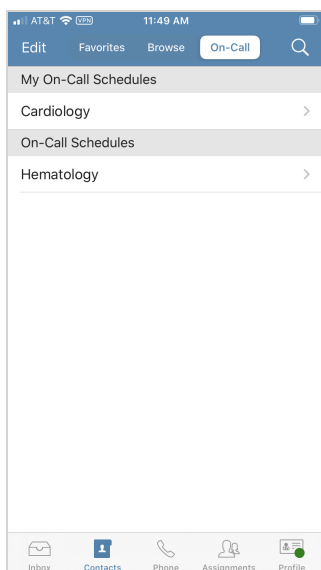


2. Touch the green insert button(s) next to the schedule(s) you want to add.



3. The selected unit displays under **My On-Call Schedules**.

4. Touch **Done**.



5. The newly selected schedule displays.



## Facility Indicator

### Background

This feature is targeted at multi-facility sites that have caregivers who work at multiple facilities and therefore have multiple extensions and DIDs.

Facility Indicator is an enhancement that adjusts the action sheet and adds an indicator to the facility where the callee last logged in and registered to a voice server. Users must still be actively connected to the voice server for their facility to receive a call.

For caregivers working in multi-facility sites, this will reduce the number of extensions and phone numbers shown on the action sheet when calling users with extensions. On the contact detail screen, "Current" is displayed next to the facility the user is logged into so caregivers can quickly identify the location and extension of the person they are trying to reach.

Single facility sites will not see any changes.

For caregivers using cellular, what displays on the action sheet and contact details depends on if the facility has external extension dialing enabled.

Please see the examples below for more details.

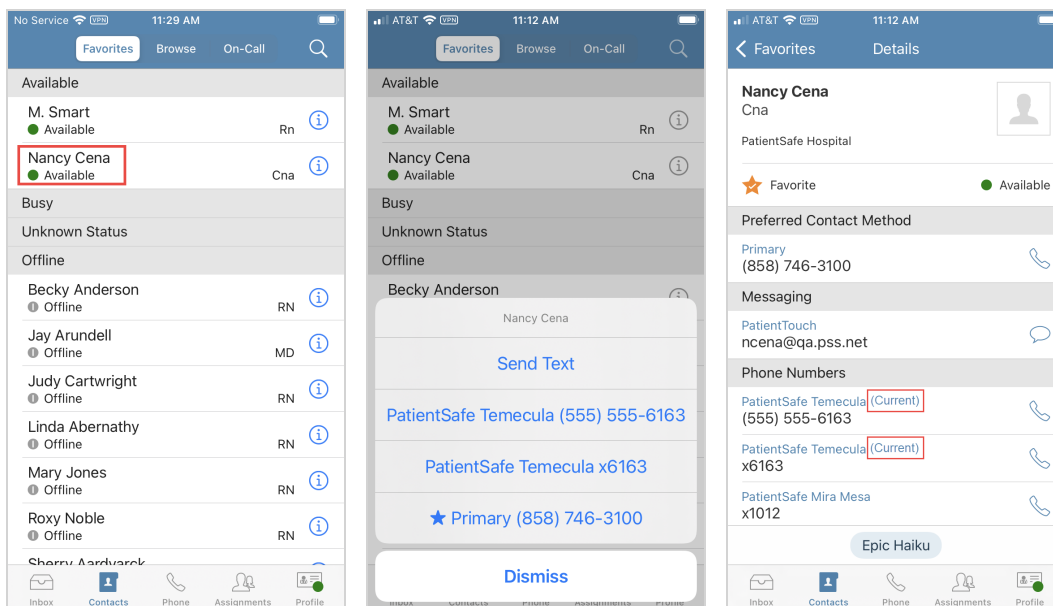
### Configuration

Users must have the correct facility code entered in their device Settings.

### User Experience

Please refer to the instructions below to learn more about this feature.

## Multi-Facility Sites

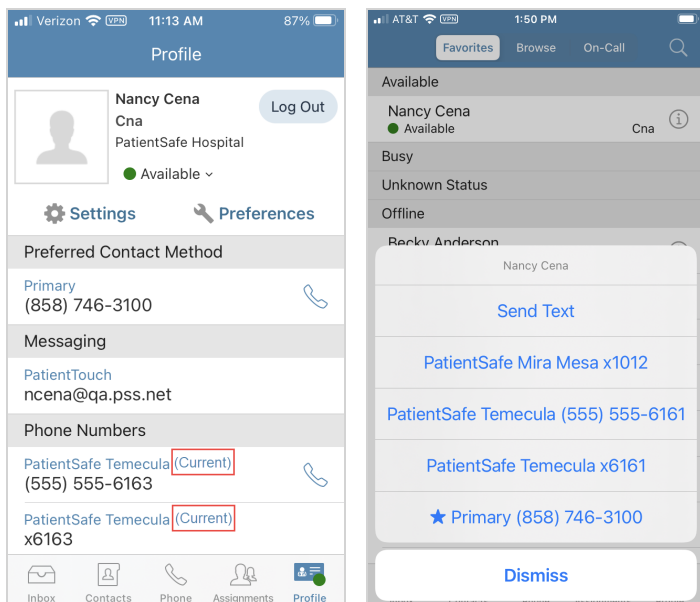


1. From **Contact>Favorites**, touch the name of the person you are trying to contact.

2. As the action sheet shows, Nancy Cena is logged into the Temecula facility and you may contact her via text message, phone number, extension, or primary phone number.

3. On Nancy Cena's Contact Details, all of her extensions and phone numbers display.

4. "Current" displays next to the facility she is logged into and the facility numbers display on top of the list of Phone Numbers.



5. Ms. Cena's own Profile tab shows "Current" next to the facility she is logged into.

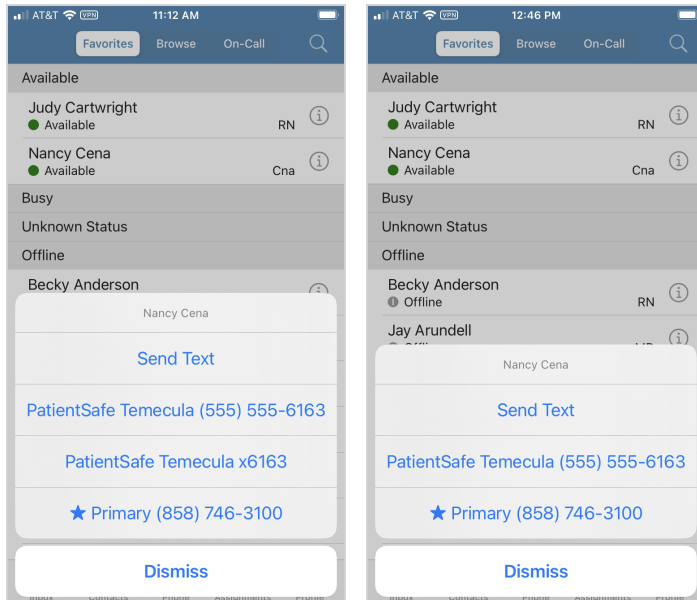
6. If Ms. Cena was not logged into any facility (not connected to a voice server), all of her extensions and phone numbers would display on the action sheet.

7. The caller would decide which facility to use to call the callee.



### Facility Indicator with Cellular

The scenario below is when a caregiver who is on cellular is calling another caregiver who is logged into the voice server for their facility.



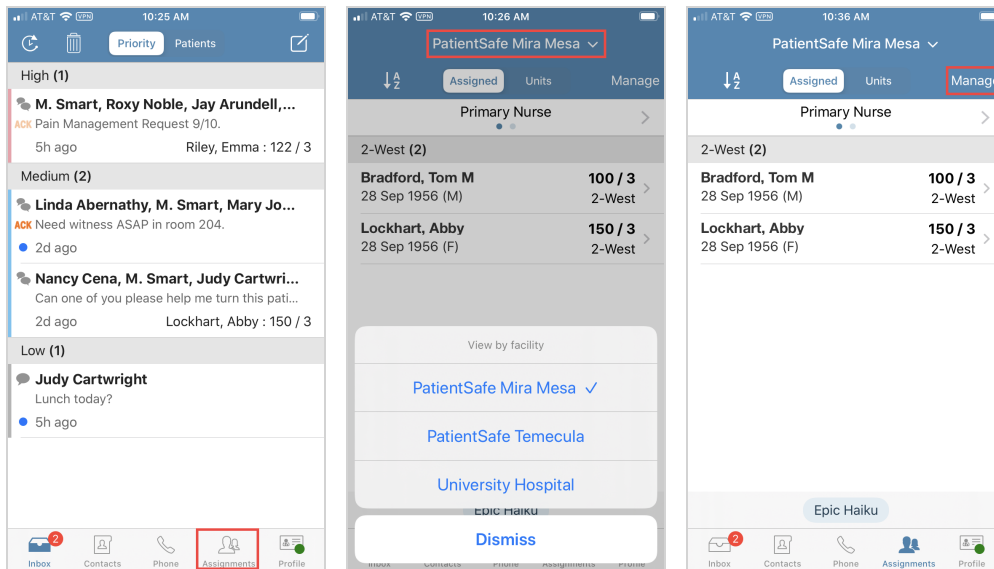
If the user is calling via cellular, and external extension dialing is enabled, then only the DID and extension for the facility where the callee is logged in will display on the action sheet.

If external extension dialing is *not* enabled, then only the DID for the facility where the callee is logged in will display on the action sheet.

## Managing Assignments

### Orchestrating Patient Assignments

Depending on your care role, the **Assignments** tab displays patients and/or nursing units assigned to the logged in user. To assign or unassign patients, use the instructions below. Users must have the "Assignments" permission to manage assignments.



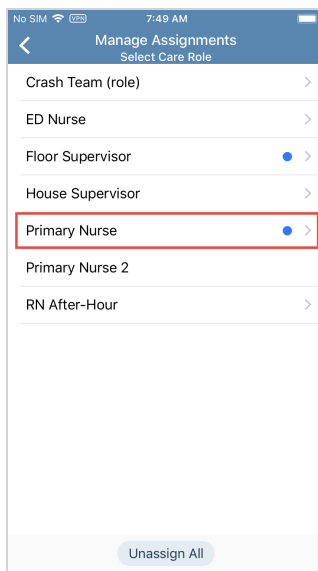
1. Touch the **Assignments** tab.

2. The **Assignments** screen displays a list of your assigned patients.

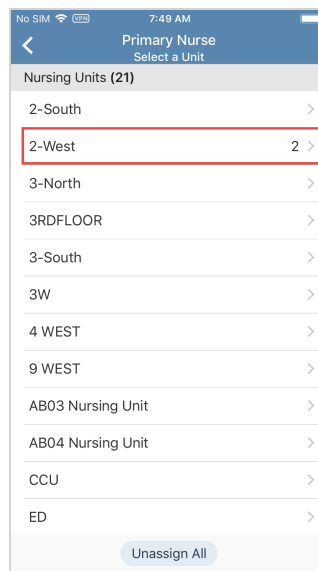
3. If you are associated with more than one facility, select the facility for which you want to manage patients.

4. Touch **Manage**.

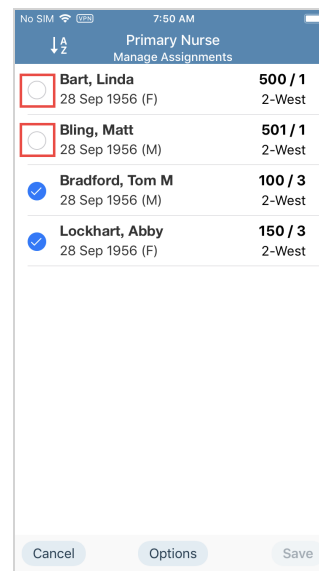




5. Select your **Care Role**.

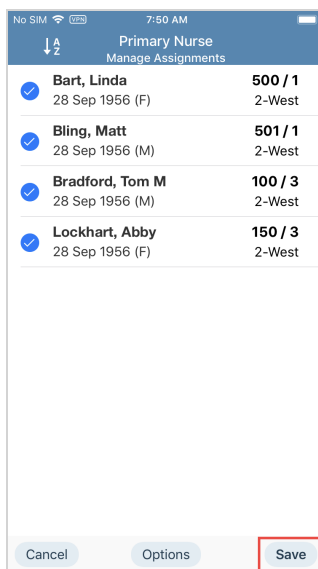


6. Select the **Nursing Unit** that has the patients you want to assign yourself to.

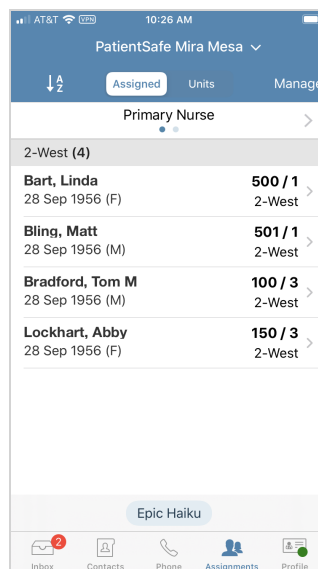


7. The list of patients that belong to this unit display.

8. Select or deselect a patient to add/remove them from your assignments.



9. Touch **Save**.



10. The list of assigned patients displays.

## Restricted Assignments

### Background

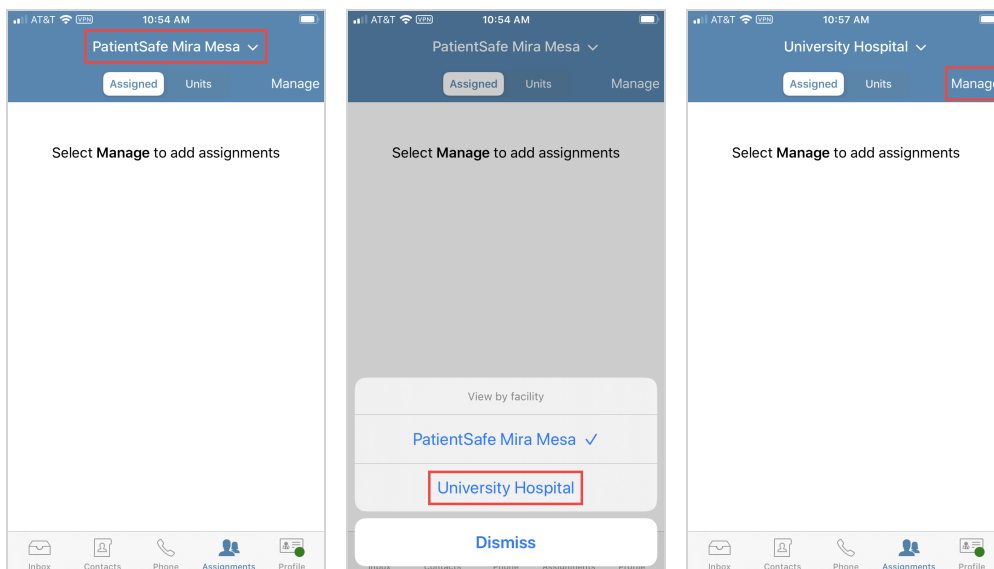
Restricted Assignments is primarily used for assignments received from an integrated system. Care Roles will have the ability to be "restricted" so that the assignments for the care role cannot be modified when they are using an on-call scheduling system.

### Configuration

Users must have the "Restrict Assignment Management" selected in the Enterprise Manager> Configuration>Care Roles.

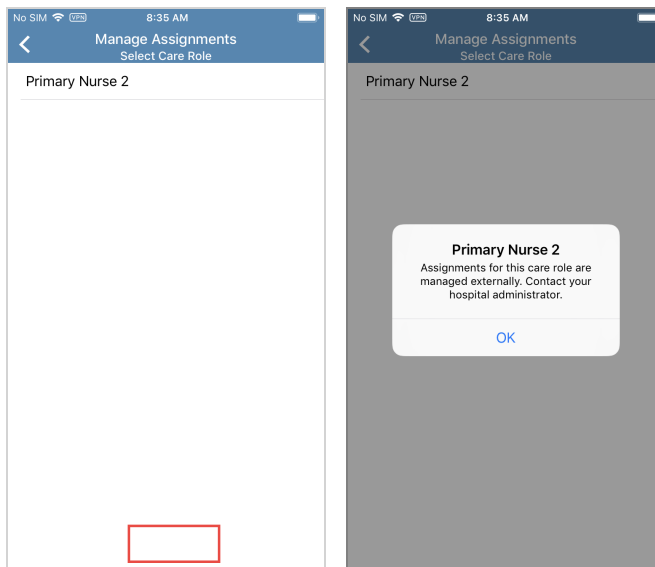
### User Experience

Please refer to the instructions below to learn more about this feature.



1. Touch the **Facility** drop down menu to select the facility for the care role.
2. Select the associated facility.
3. When caregivers have the **"Restrict Assignment"** flag on their assigned Care Role, they will **not** be able to manage their assignments.
4. Touch **Manage** to see what happens.

## Single Care Role



5. If users have only one care role and it has the "Restrict Assignment" flag, then the **Unassign All** button will not display.

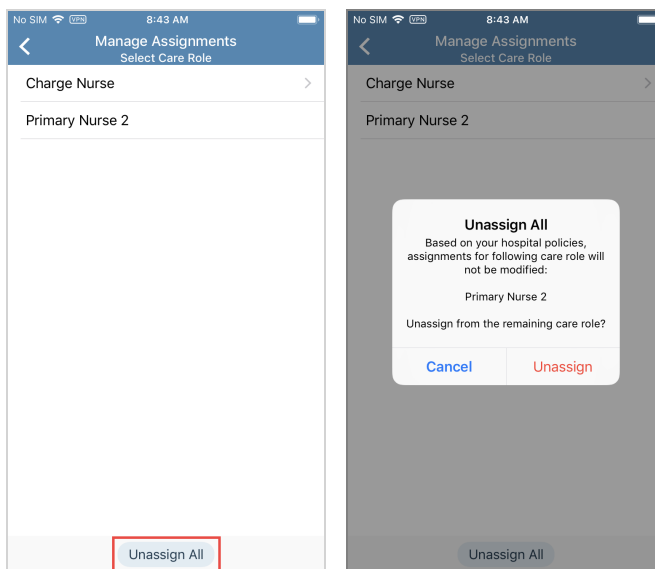
6. Touch **Primary Nurse 2**.

7. A message displays stating that the assignments for this care role are managed externally.

8. Touch **OK** to return to the **Assignments** tab.



## Multiple Care Roles

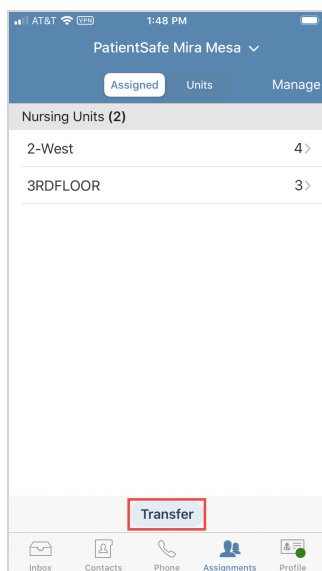


1. If users have multiple care roles and one of them has the "Restrict Assignment" flag, then touching **Unassign All** should only unassign care roles without the restriction flag.
2. Touch **Unassign All**.
3. A message displays stating that the assignments for the care role with the "**Restrict Assignment**" flag will not be modified.
4. Touch **Unassign** to unassign patients from the other care role.

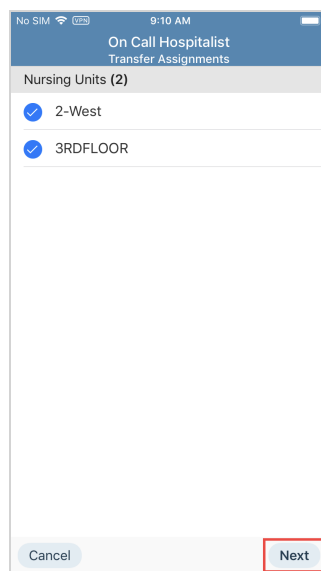
## Transferring Assignments

Caregivers can transfer their assignments to another caregiver. This may be useful for Care Roles like an On-Call Hospitalist who may want to transfer assignments to the Admitting Hospitalist. Users must have the "Assignment Transfer" permission in order to transfer assignments.

## On-Call Hospitalist



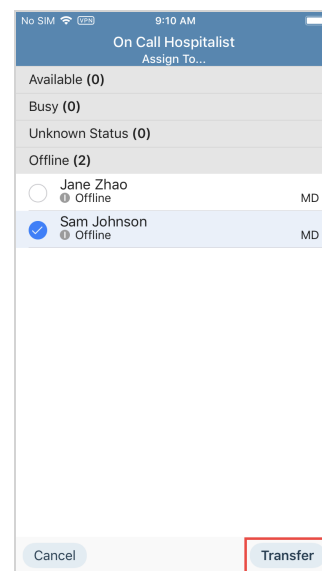
1. From the Assignments tab, touch **Transfer**.



2. The nursing units display that are ready for transfer.

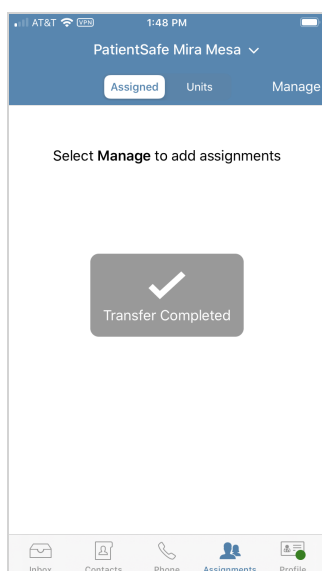
3. Deselect any unit you do not want to transfer.

4. Touch **Next**.



5. Select the recipient of the transfer. In this case, it is the Admitting Hospitalist.

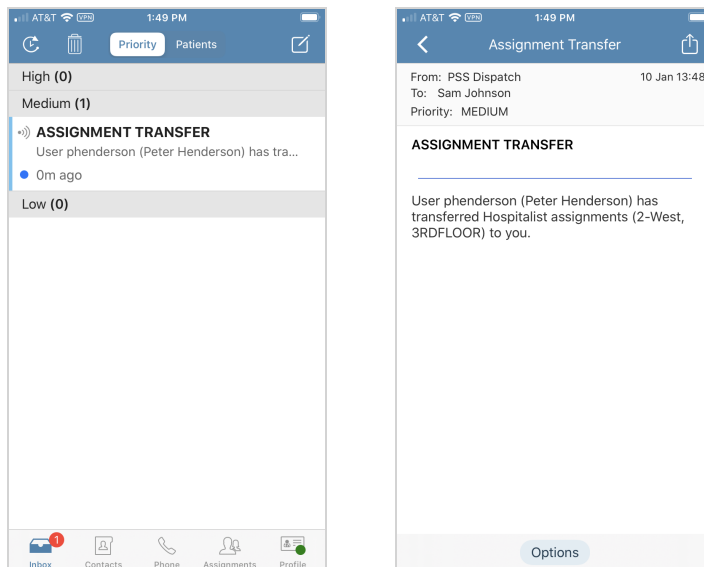
6. Touch **Transfer**.



7. A check mark displays indicating a successful transfer.

## Admitting Hospitalist

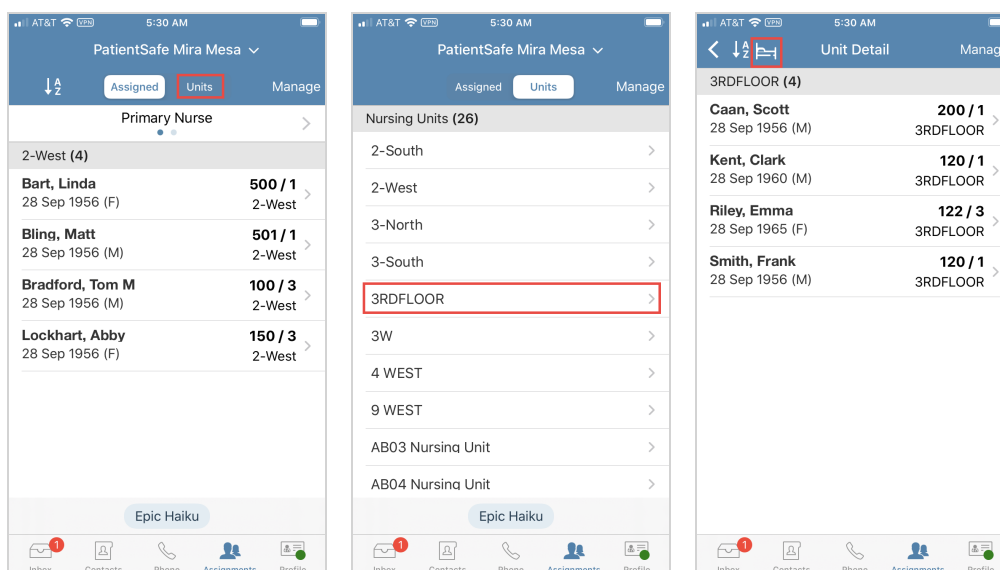
The recipient of the transfer receives an **Inbox** notification. The message priority is configurable for each facility.



1. Touch the message summary.
2. The details of the assignment display.

## Filter Empty Beds

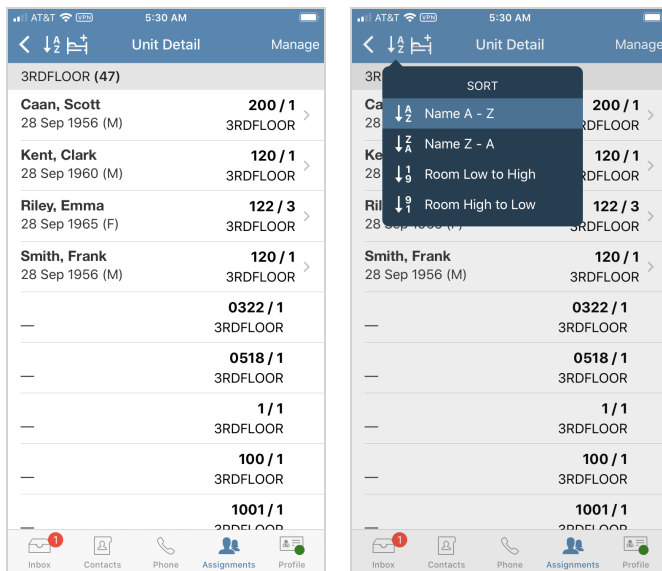
Vocera Edge Communications has a filter that allows users to hide or display empty beds. This feature may help prevent users from scrolling too much if their hospital has multiple nursing units with empty beds. Please follow the instructions below to hide or display empty beds.



1. From the Assignments tab, touch **Units**.
2. Select the desired nursing unit for which you want to
3. Touch the **Bed** icon.



display empty beds.



4. All of the empty beds for this nursing unit display.

5. The **Sort** icon arranges beds in order.

## Hidden Nursing Units

### Background

Marking a nursing unit as “hidden” hides the nursing unit from displaying in the client applications and Enterprise Manager in browse and assignment flows. It does not remove the nursing unit or any of the patients in the nursing unit from the system.

### Configuration

To hide a nursing unit, navigate to Enterprise Manager>Configuration>Organization Units>Select the Nursing Unit>Click the check box "Hide Nursing Unit."

### User Experience

Hidden nursing units display differently for direct care roles vs indirect care roles. Please see the details below to learn more.

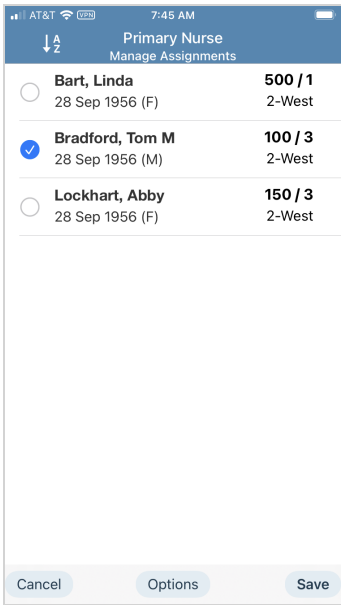
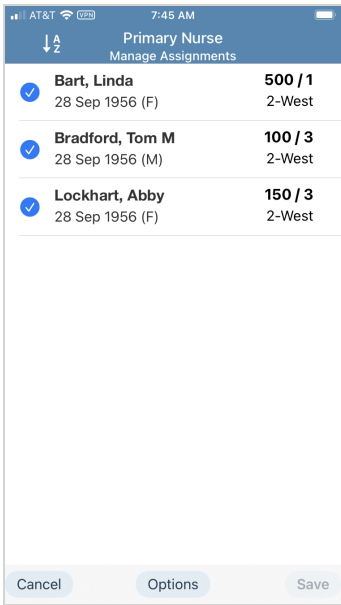
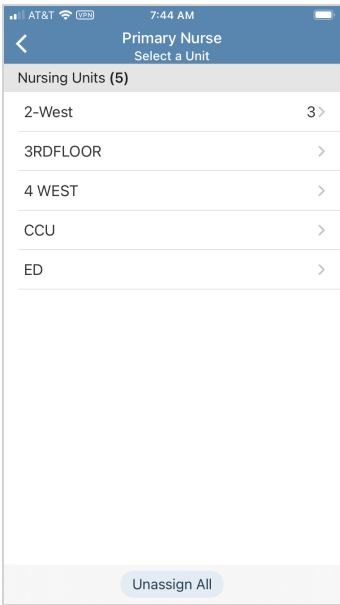
#### *Direct Care Role Assignments*

If a caregiver in a direct care role assignment (care role assigned to a patient) has an assignment to a patient in a hidden nursing unit, we will display the assignment to allow for unassignment.



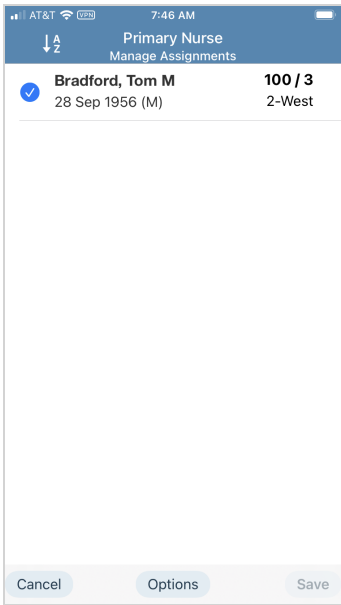
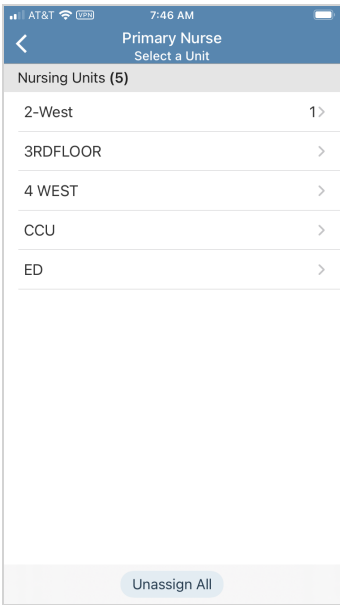


Unassigning Patients from a Hidden Nursing Unit



1. 2-West is the hidden nursing unit. This unit still displays to allow unassignments.
2. Touch 2-West.
3. Select the patients to unassign.
4. Touch **Save**.

Once they have been unassigned, patients do not show up again to re-assign when the nursing unit is hidden.



5. If the same caregiver attempts to reassign patients who are in a hidden nursing
6. But only patients who are available to unassign display.

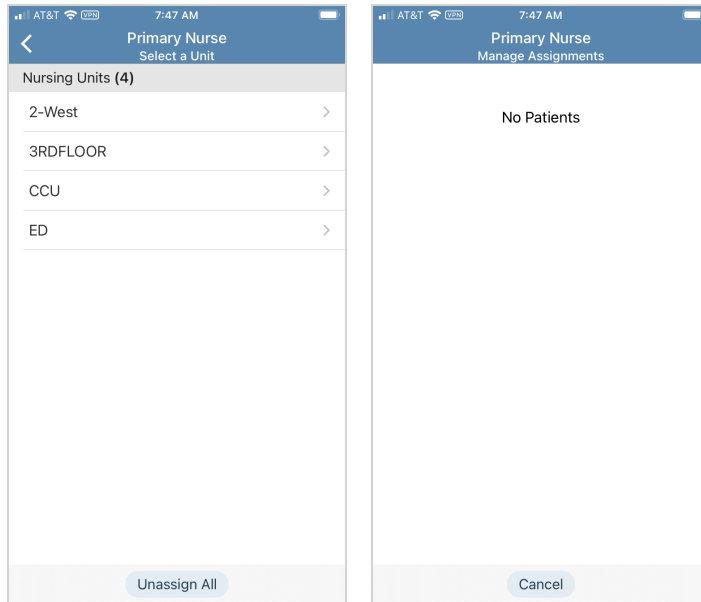


unit, the unit still displays.



### Another Nurse Attempts to Assign to Patients in Hidden Unit

If another caregiver attempts to assign to patients that are located in a hidden nursing unit, the patients do not display.

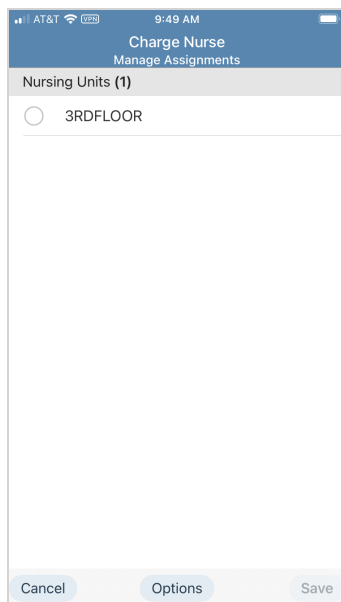


1. The hidden nursing unit 2-West displays.
2. Touch 2-West.
3. The patients however, do not display.



### *Indirect Care Role Assignments*

When a caregiver with an indirect care role assignment (care role assigned to a location or organization unit) tries to assign to a hidden nursing unit, the unit will not display.

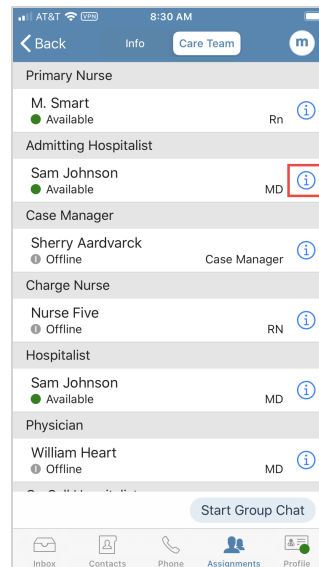
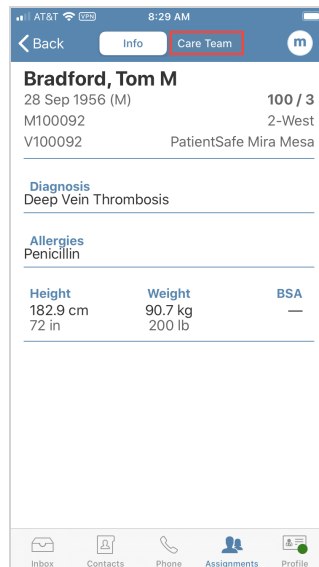
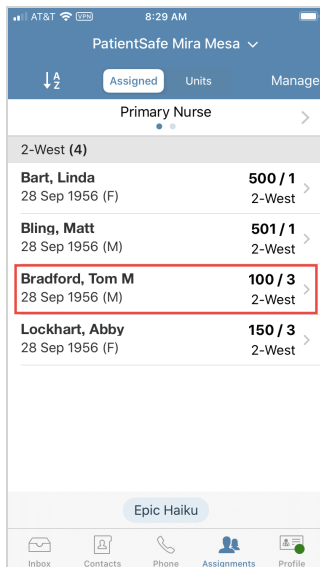


1. The hidden nursing unit 2-West does not display.  
However, when 2-West becomes visible again, it will display for assignment.

## Patient Information & mView

### Viewing Patient Information

Please use the instructions below to access patient assignments, patient information, and the patient's care team.



The **Assignments** tab displays all patients assigned to the logged in user.\*

**Note:** \*Hidden nursing units affect the display of patients. Refer to the Hidden Nursing Units topic below.

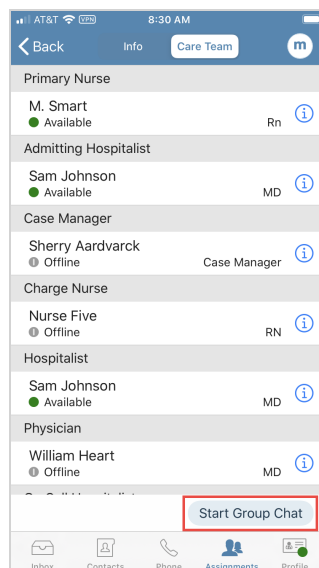
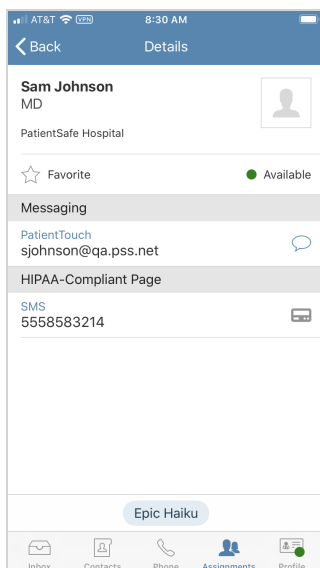
1. To view patient information, select a patient from the list.

2. The **Patient Info** screen displays with detailed patient information including the date of birth, MRN, diagnosis, allergies, and so on.

3. Touch **Care Team**.

4. The patient's care team members display.

5. Touch the **Info** icon to see care team contact information.



6. Use any of the methods

7. Touch **Start Group Chat** to

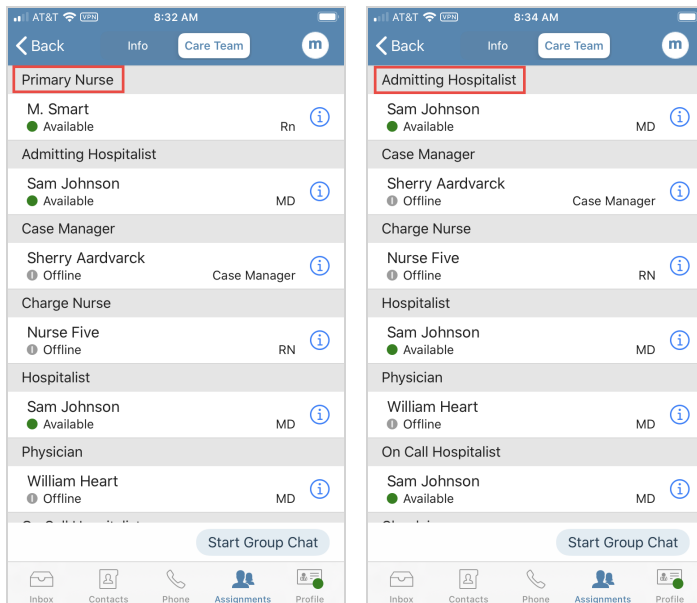


available to communicate.      send a message to care team members.



## "Hidden" Care Roles

When the Show on Care Team setting is enabled for a care role in the **Enterprise Manager**, that care role displays in the Care Team list of Vocera Edge. If the setting is disabled, the care role will not display in the Care Team list - it remains "hidden" from view and the next Care Role displays instead.

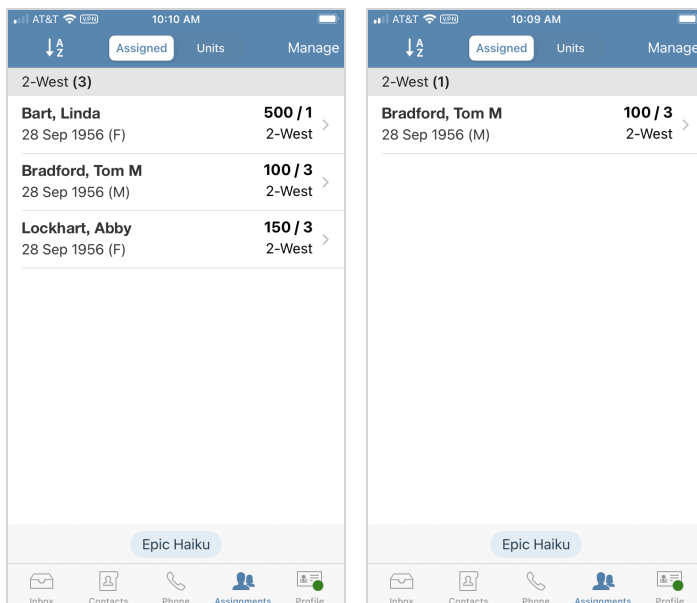


1. In the Care Team list above, care team members display according to care role. Notice the **Primary Nurse** care role displays at the top.
2. In the image above, the **Primary Nurse** care role has been "hidden" and the next care role in the list displays instead.

## Hidden Nursing Units

Nursing units can be hidden from view in Vocera Edge clients in the contact directory, patient browse, and assignments. Examples of units that are hidden include outpatient nursing units or temporary units that Vocera Edge caregivers do not need visibility into.

If a nursing unit is hidden, caregivers will only be able to access patients in that unit to unassign. When that unit becomes visible again, patients will become available to assign.



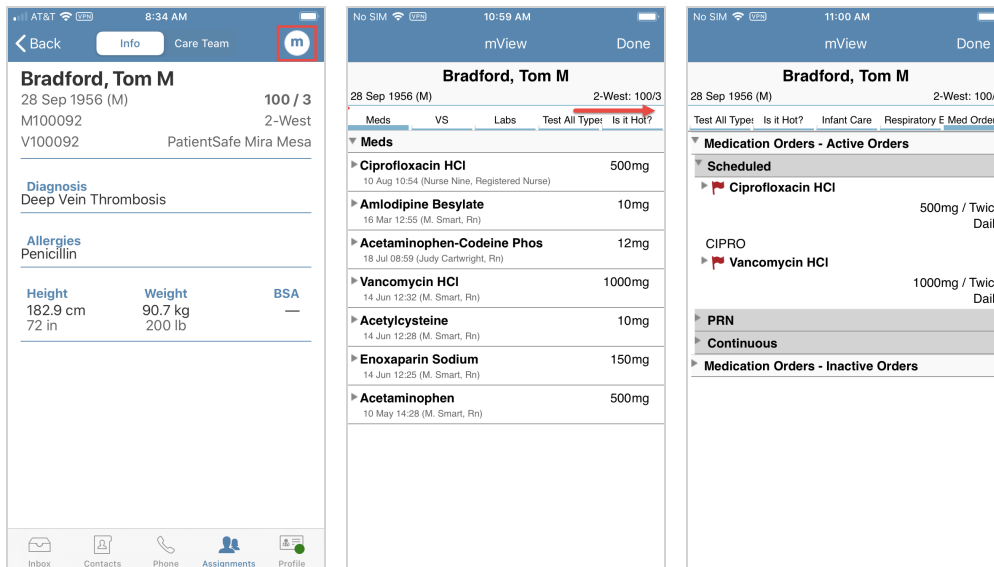
In the image above, the nursing unit is not hidden. It is visible with patients to assign and unassign.

In the image above, the nursing unit has been hidden and only patients who are available to unassign display.

## Viewing Patient Information via mView

Vocera Edge Communications provides a “mobile view” of patient information known as mView. The patient’s mView displays the last documented values for data such as medication administrations, care interventions (vital signs, assessments, etc.) lab results, and med orders. mView tabs (Meds, VS, Labs, etc.) are configured using the **Clinical Manager**.





1. From the Patient Info screen touch **mView**.

2. Touch each tab to view detailed information (Meds, VS, Labs, etc).

3. Touch the gray, down arrow to display contents.

4. Scroll to the right to view additional tabs.

5. The additional tabs display.

6. Touch the gray, down arrow again to close the contents.

## SMS Patient Contact

### Background

SMS Patient Contact allows caregivers utilizing Vocera Edge to send SMS text messages to patient contacts, such as family members or friends. For example, a patient may be getting ready for discharge from the hospital, and they need a family/friend to come pick them up. Or a patient may be in surgery and a caregiver wants to communicate the patient status to a family member or friend. SMS Patient Contact increases patient family/friend satisfaction as it provides updates of patient status without requiring them to be in the hospital.

Example use cases for sending SMS text messages include the following:

- Discharge Coordination
- Patient Status Updates
- Virtual Waiting Room Coordination

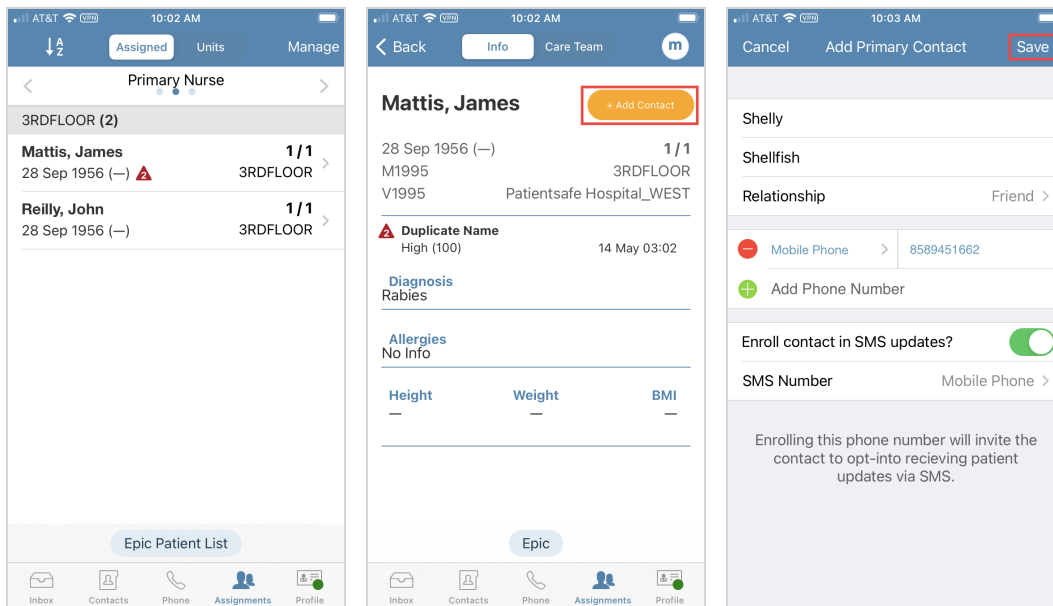
### Configuration

- Twilio is required for sending/monitoring/receiving SMS pages
- SMS Patient Contact messages are configured in the Enterprise Manager>Settings>SMS Patient Contact
- Caregivers need to have the **Edit Patient Contact Information** permission to add and edit patient contact information on the contact details screen
- Caregivers need to have the **Enable SMS Patient Contact** permission to send SMS messages to patient contacts

## User Experience

In the scenario below, nurse M. Smart is going to add a contact for the patient James Mattis, who is getting ready to be discharged from the hospital. Then, she will send the contact an SMS message asking her to pick up the patient from the hospital at 12:00 pm. The scenario below shows both the sender (M. Smart) and receiver (patient contact Shelly Shellfish).

### Sender - M. Smart

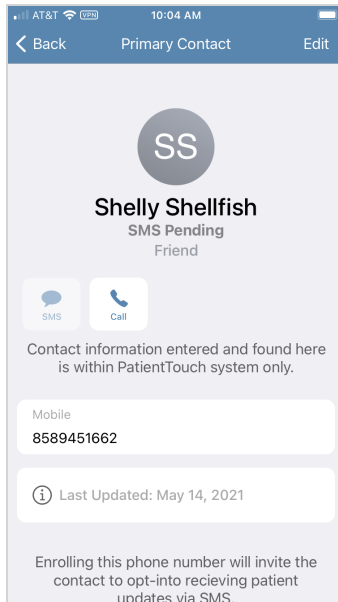


1. From the **Assignments** tab, touch the patient's name (James Mattis).
2. Touch **Add Contact**.
3. Complete the fields as shown in the image above.
4. Touch **Save**.

**If Add Contact does not display, check to see that you have the Edit Patient Contact**

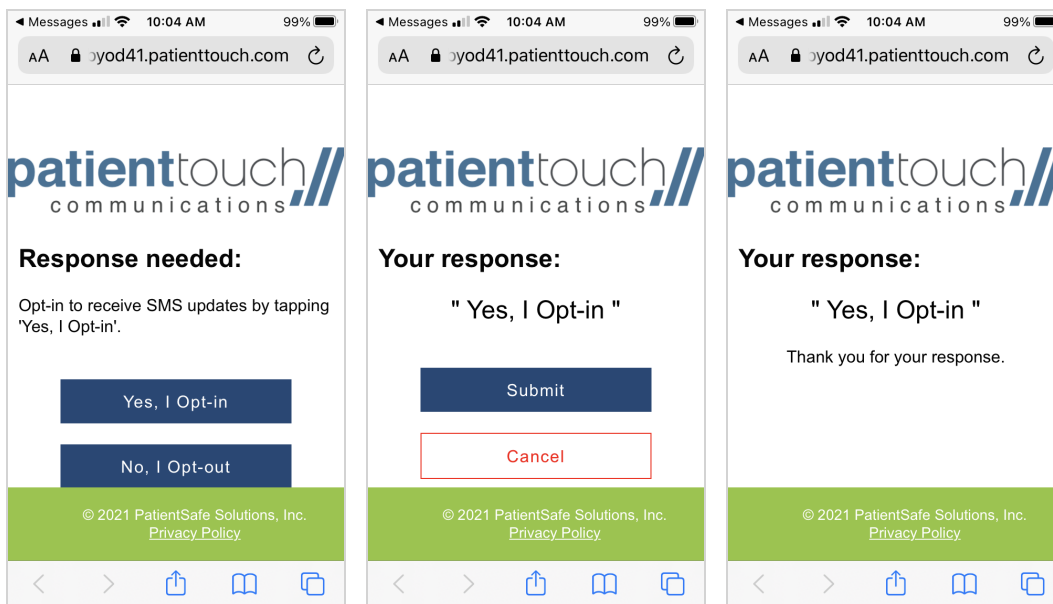


**Information permission.**



5. The patient contact screen shows **"SMS Pending"** and the **SMS** icon remains inactive until Shelly responds to the Welcome message.

### Receiver - Shelly Shellfish



1. Shelly receives a Welcome message asking if she wants to opt-in to receiving SMS updates.

2. Touch **Yes, I Opt-in**. Shelly can opt-out at any time using the provided link.

3. Touch **Submit**.

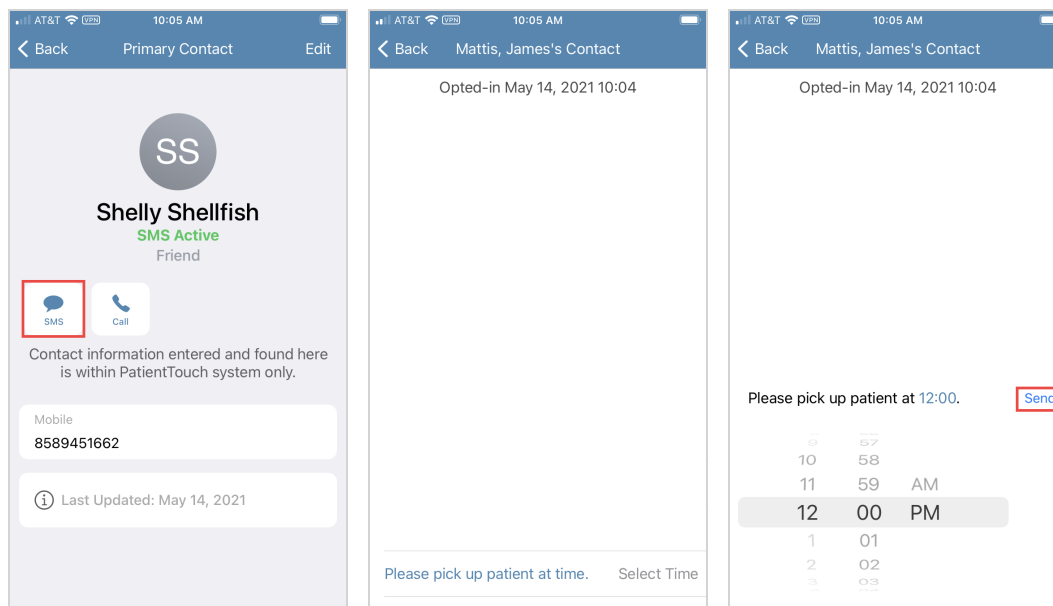
4. The screen confirms Shelly's choice to opt-in.

**At any time, a patient contact can return to the Welcome message and opt-out of**



**receiving SMS messages, or opt back in.**

## Sender - M. Smart



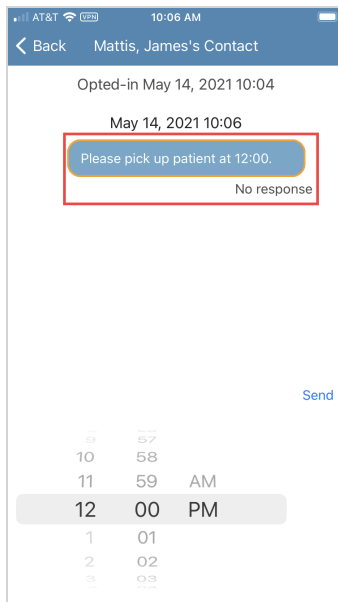
1. Once Shelly opts-in, the SMS icon status changes to **Active**. Touch the **SMS** icon.
2. Select from a list of predefined text messages. In this scenario, select Please pick up patient at \$TIME.\*
3. Select the time using the picker.
4. Touch **Send**.

\*Some messages may include the following designated words that you will replace in the content of your message:

\$FACILITY: Caregivers can enter the facility the patient is in

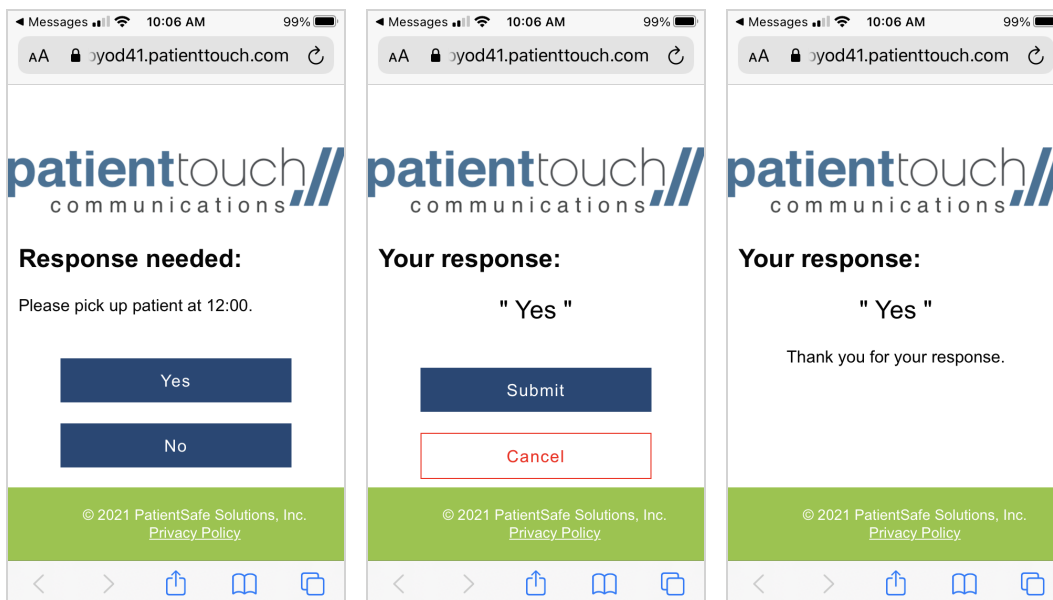
\$TIME: Caregivers will have the ability to choose the time when they send the message

\$NUMBER: Caregivers will have the ability to enter a call back phone number when they send the message



5. The message displays with an indicator of **No Response**.

### Receiver - Shelly Shellfish



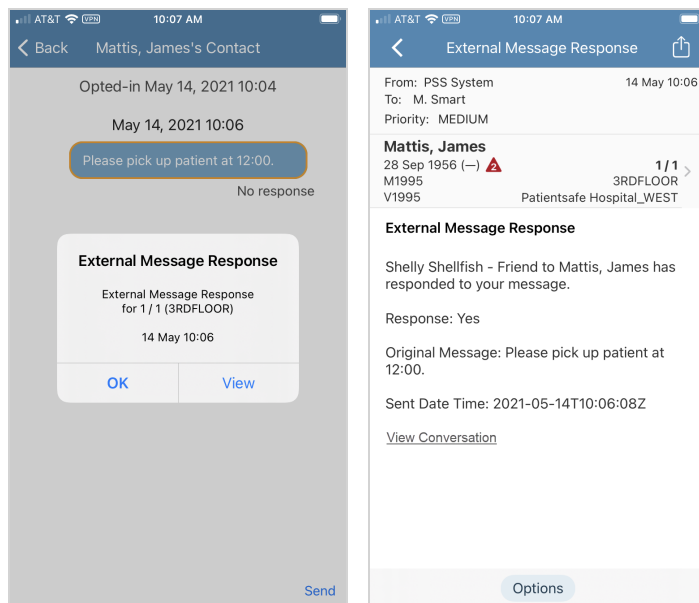
1. Shelly receives the message and wants to pick up the patient at 12:00 pm. Touch **Yes**.

2. Touch **Submit**.

3. The screen confirms Shelly's **Yes** response.



## Sender - M. Smart



1. A notification displays in M. Smart's Inbox that indicates Shelly has responded. Touch **View**.
2. The message indicates she responded positively to picking up the patient at the designated time.
3. Touch **View Conversation** to access the conversation.

## Appendix A: Configure Vocera Edge Communications iOS Settings

Typically, your hospital's IT administrators configure the following settings using MDM. If however, this has not taken place, use the instructions below to configure your device.

1. Go to Settings on your device
2. Select Vocera Edge Communications
3. Under Server Settings, use the following to configure your device:

### For Shared Devices:

In-hospital Shared Device = true  
 Allow VoIP Calling = true  
 Prefer Cellular Calling = false

### For BYOD:

In-hospital Shared Device = false  
 Allow VoIP Calling = false  
 Prefer Cellular Calling = true