

# User Manual for BlueJay*Engage*

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**Engage Patients,  
Enhance Care**

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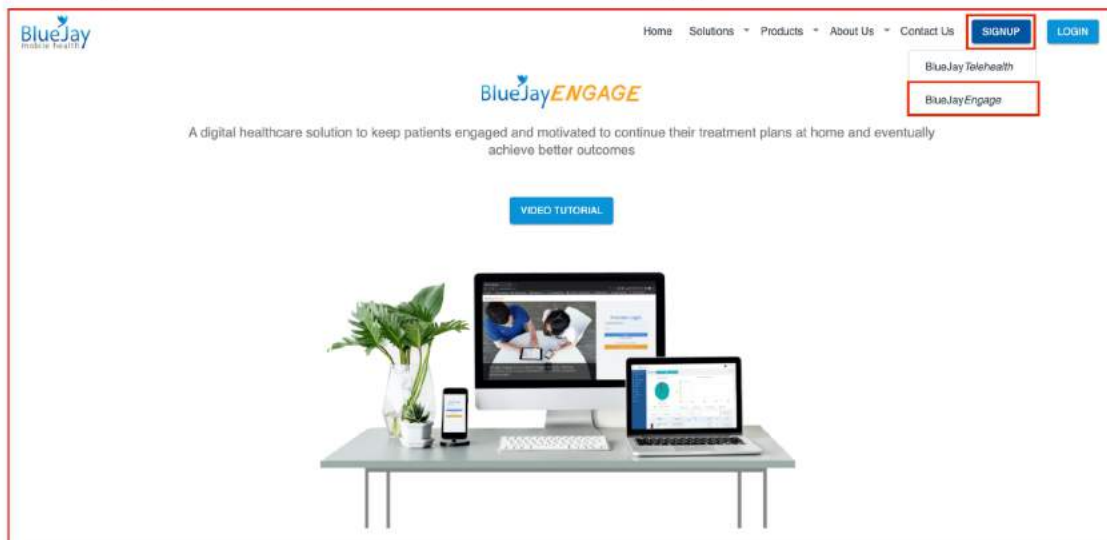
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# 1. Sign Up

## 1.1. Register Your Account

BlueJayEngage is a digital healthcare solution that keeps your patients engaged and motivated to continue their treatment plans at home, and achieve better outcomes.

To sign up as a provider, visit BlueJay's website: [www.bluejayhealth.com](http://www.bluejayhealth.com). Click "Sign Up" at the top right, then select "BlueJayEngage".



When you do so, you will be directed to the following page.

Fill in all the required information, and click "Get Started!" to create your account. You will receive an activation email from [service@bluejayhealth.com](mailto:service@bluejayhealth.com) once you submitted your details.

Check "Spam" or "Junk" folder if you don't find the email in your inbox.

## 1.2. Profile Set-Up

Once you successfully log into your account, you may update your profile from the top right corner of the page.

Open the dropdown menu, then select 'My Profile'. On the left-hand side, you can update your personal information, for instance, your contact number, user role, license number, etc.

If you are a clinic admin, you can also edit your clinic's information on the right-hand side. Click "Save" to save the changes.

**My Profile**

First Name: Demo

Last Name: BlueJay

Email: demo@bluejayhealth.com

Password: [Masked]

Retype Password: [Masked]

Phone: US (+1) 925-000-0000

Physical Therapy License Number: [Masked]

School Name: [Masked]

Language: Select Language (English, Chinese, Spanish)

Provider Role: Physical Therapist (PT)

**Clinic Profile**

Name of Organization: BlueJay Demo

Clinic Address: 4370 Contractors Cms, Livermore, CA 9455

Phone: US (+1) 925-400-8254

Email: [Masked]

Website: [Masked]

Clinic Hours of Operation: Mon, Tues, Wed, Thurs, Fri, 09:00 AM - 05:00 PM

Video Consultation Hours: Mon, Tues, Wed, Thurs, Fri | 08:00 AM - 12:00 PM, 01:30 PM - 05:00 PM

Video Consultation Fee (\$): [Masked]

Payroll Email: tony.zhong@bluejayhealth.com

Enable Multi-Factor Authentication: [Checkbox]

**Save**

## 2. My Patients

### 2.1. Add New Patients

There are two options next to the 'Patient List'.

You can enter an individual patient by using the "Add New Patient" option. Fill in the relevant information of your patient and click "Save". Select the checkbox "Enable Communication" if you want to receive messages from this patient.

**BlueJay ENGAGE**

**Patient List** **Add New Patient** **Bulk Upload Patients**

**Compliance Status**

100% Good, 0% At Risk, 0% Poor

**Patient Compliance Trend**

Compliance: All, Outcomes: All, Exercise: All, Status: All

Name	Compliance	Outcomes	Exercise	Survey	Status
Jack Smith (M/35Y)	100%	100%	100%	100%	More history results available
BlueJay Test Patient (M/33Y)	100%	100%	100%	100%	100%
Bob Smith (M/38Y)	100%	100%	100%	100%	PHQ not complete

State :	California
Zipcode :	94117
MRN :	MRN
Insurance Covered:	Kaiser
Insurance ID:	000123456
Insurance Group Number:	1234567
Referral MD :	Referral MD
Room # :	Room #
Bed # :	Bed #
<input checked="" type="checkbox"/>	Enable Communication ( The patient will be able to message you.)
<a href="#">Save</a>	

The “Bulk Upload” option allows you to add multiple patients at a time. When you click “Bulk Upload Patients”, a pop-up will appear as the following screen

Step 1: Download template file and input data

Download Patient Template

Step 2: Upload Completed File

Upload Patient List

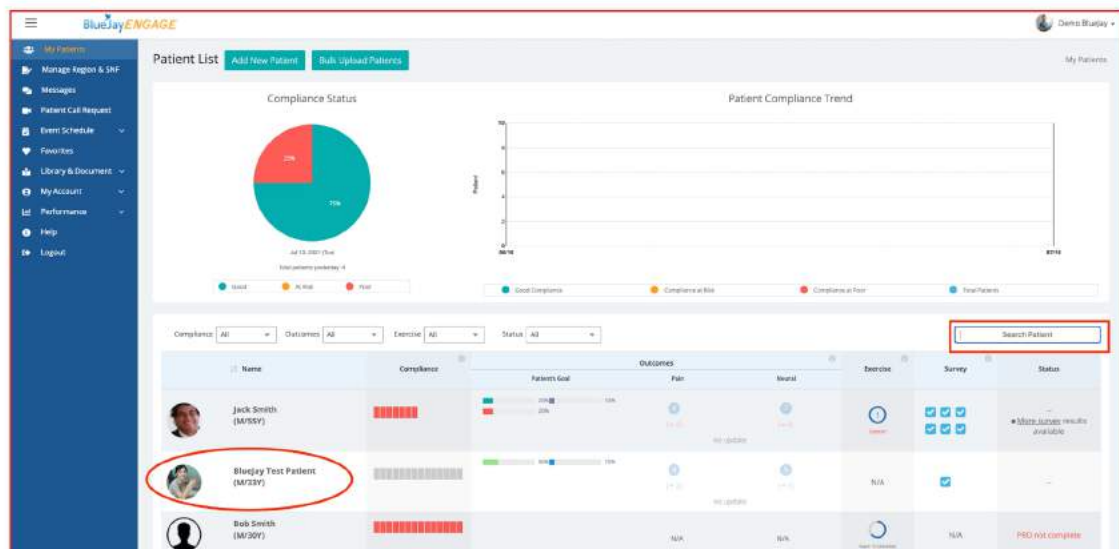
Cancel

Click “Download patient template” to download our template to your computer. Fill in the relevant information of your patients, and then upload the patient list to the system.

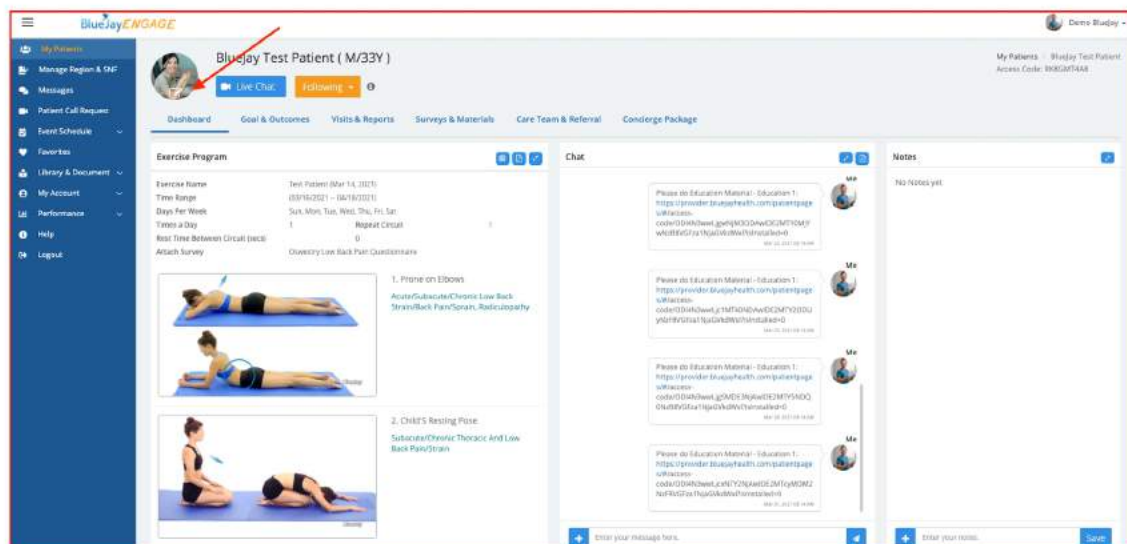
Please notice: Follow the format that we have provided in the template; do not leave any extra columns or rows. We recommend adding no more than 1,000 patients at a time.

## 2.2. Edit Existing Patient’s Profile

To edit an existing patient’s profile, click on the patient’s profile picture in the ‘Patient List’. You can also use the search box to help you narrow the results.



After selecting a patient, you will be directed to this patient's personal dashboard. Tap on the pencil icon to start editing.



## 2.3. Compliance & Outcomes

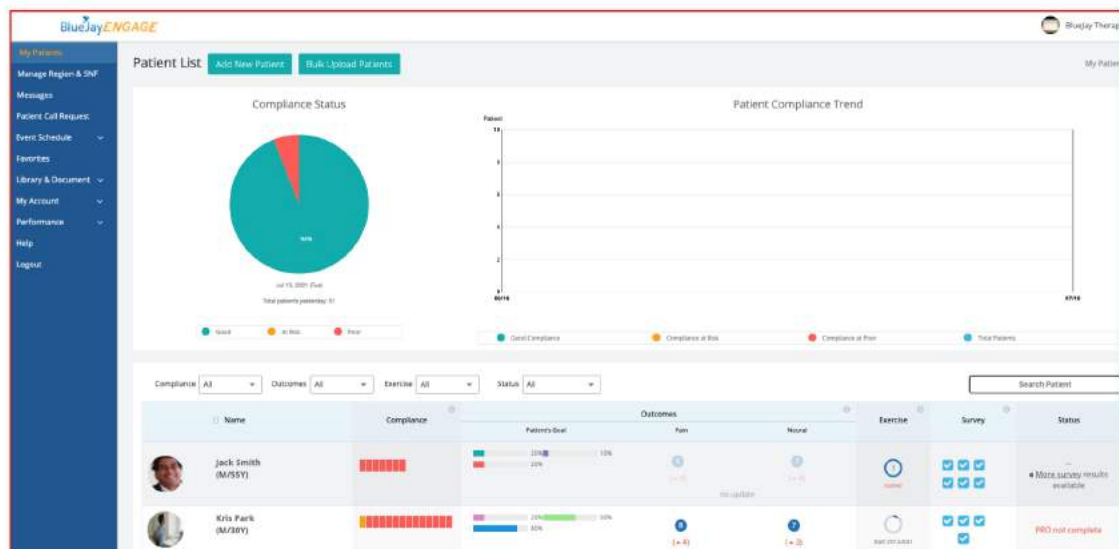
The following dashboard gives the overall status of your patients i.e. compliance status, outcomes data, survey results, and goal completion status.

Compliance Matrix:

### Compliance Status

Green	Good	The percentage of patients who <b>completed</b> all the tasks yesterday.
Yellow	At-Risk	The percentage of patients who <b>partially completed</b> the task yesterday.
Red	Poor	The percentage of patients who <b>did not do any task</b> yesterday.





### 3. Patient's Personal Dashboard

A patient's personal dashboard helps you to keep the track of your patient's health journey in an efficient manner.

#### 3.1. Dashboard

##### 3.1.1. Exercise Program

Click "Create New Tx" to prescribe a Home Exercise Program to the patient.

The screenshot shows the BlueJay ENGAGE Patient's Personal Dashboard for Luke Goodwin (65Y). The dashboard has a sidebar with navigation options like 'My Patients', 'Manage Region & SNF', 'Messages', 'Patient Call Request', 'Event Schedule', 'Favorites', 'Library & Document', 'My Account', 'Performance', 'Help', and 'Logout'. The main content area includes a 'Dashboard' header with 'Live Chat' and 'Following' buttons. Below this, there are three sections: 'Exercise Program' (with a 'Create New Tx' button), 'Chat' (with a list of messages), and 'Notes' (with a 'New Note' button).

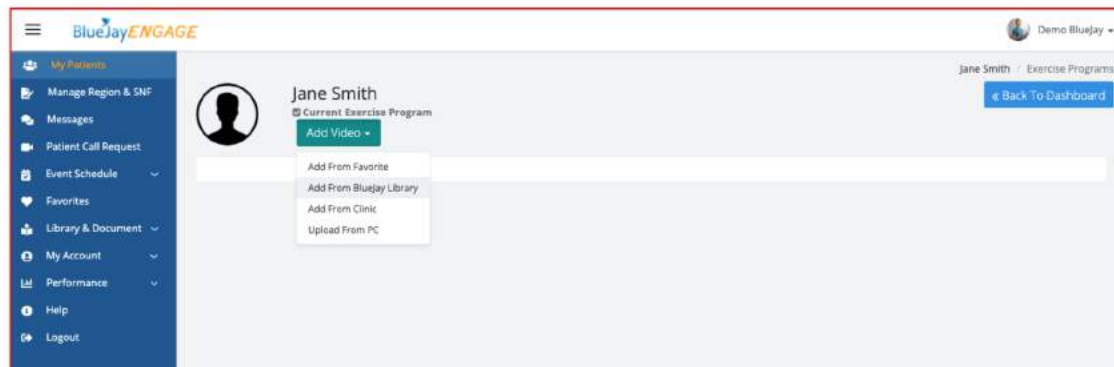
The default treatment name is your patient's name with the current date. Click "Next" to continue.

The screenshot shows the 'Create New Exercise Program' dialog box. It has a title bar with a close button. Below the title bar, there is a text input field containing the default treatment name 'Jane Smith (Jul 14, 2021)'. At the bottom right of the dialog box, there is a blue 'Next' button.

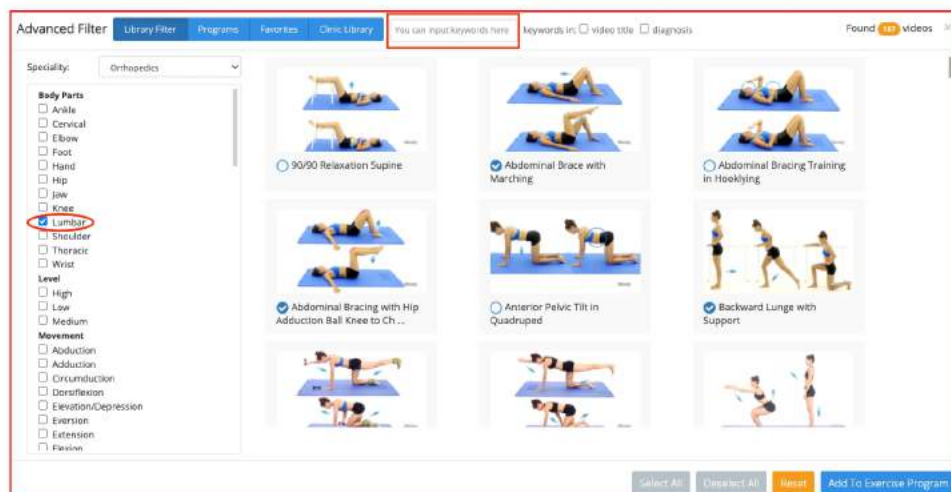
You can add videos from your favorite list, BlueJay library, your clinic library, or upload them from your PC.

We will show you how to create your favorite video list and how to build up your clinic library in section 7 and section 8.

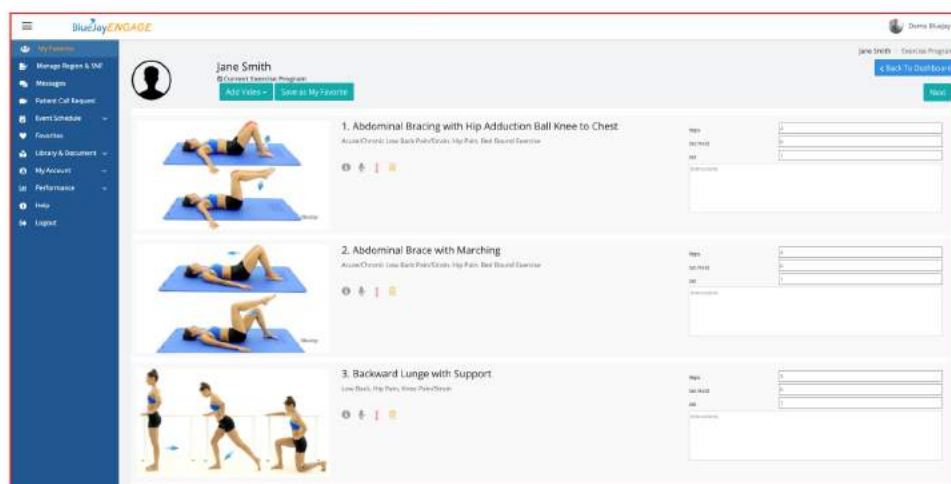
To add videos from the BlueJay library, click 'Add from BlueJay Library' from the 'Add Video' dropdown.



Select the videos you want to send to your patient. You can use the filters or the search box to help you narrow down the results. Once you select the required videos, click "Add to Exercise Program" at the bottom right.



You can assign the number of reps, sec hold, set, and add specific instructions if necessary. Click "Next" to continue.





Adjust the date and frequency of the treatment. You can also attach a survey with the treatment. Click "Schedule & Send Exercise Program" to send the treatment plan and reminders to your patient's registered email and cell phone number.

Schedule

Exercise Program Name
Jane Smith (Jul 14, 2021)

☒ Enable Time Range

Start
Jul 14, 2021
End
Jul 21, 2021

Days Per Week

Sun
☒

Mon
☒

Tues
☒

Wed
☒

Thurs
☒

Fri
☒

Sat
☒

Check All
☒

Frequency

Times a day
1

Repeat Circuit
1

Rest time between circuits (secs)

Survey

Attach survey
No Survey

Schedule & Send Exercise Program

If the patient has BlueJayEngage patient app installed on their mobile device, this patient will also receive our in-app notification.

#### Patient's View



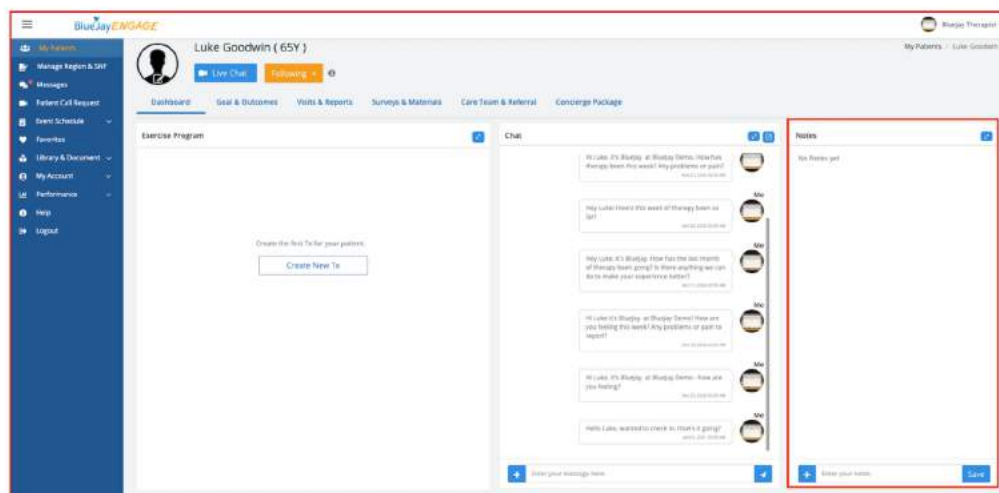
To provide a handout of the prescribed treatment to your patient, select the Print/Export PDF button.



### 3.1.3. Notes

You can make notes or upload documents under the “Notes” section.

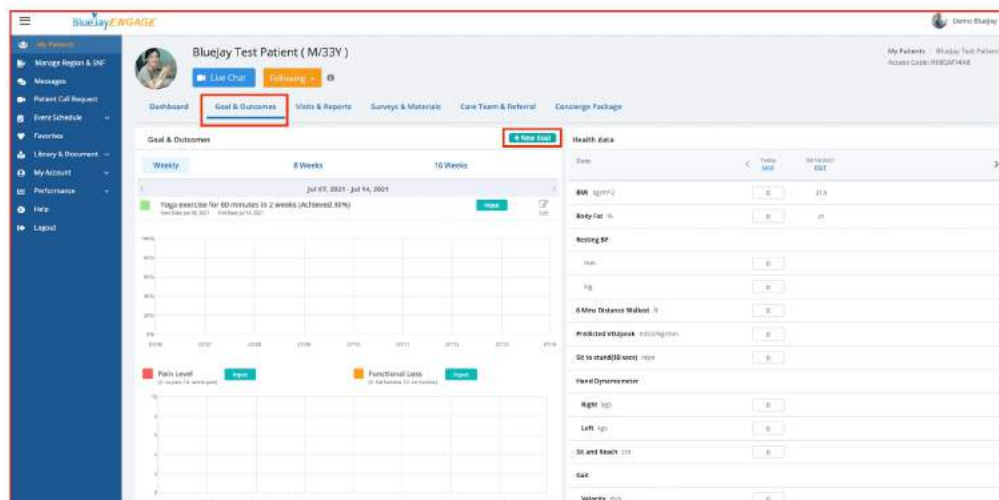
All the records under this section will only be visible to you.



### 3.2. Goal & Outcomes

The “Goal & Outcomes” feature allows you to set a goal for your patient, and closely track their health progress.

Tap on “+ New Goal” to set up a new goal.



You will be asked to enter the details of this goal, i.e. type of the activity, quantity, duration, etc. After providing the information, click “Save”.

Set up participant's Goal

The goal will be displayed to the healthcare professional and participant. The participant will be able to log their progress weekly.

Activity (Set a functional activity that is meaningful to the participant. e.g.: play tennis, play golf, etc.)

Walk without pain

Amount or quantity (Set the amount for the goal.)

10

hours

Duration (Set a reasonable duration for achieving the goal.)

In 3

weeks

Save

BlueJay system sends out email surveys to help you collect the data on a weekly basis. Your patients can submit their current pain score, functional loss level, and completion rate through the weekly survey. As the provider, you can manually enter the data from the page above if necessary.

### 3.3. Visits & Reports

The “Visits & Reports” tab provides the details of the patient’s visit history. You can view, edit, and download the reports from this page.

The screenshot shows the 'Visits & Reports' tab for patient Jack Smith (M/55Y). The interface includes a sidebar with navigation options like 'My Patients', 'Manage Region & Shift', 'Messages', 'Patient Call Request', 'Event Schedule', 'Favorites', 'Library & Document', 'My Account', 'Performance', 'Help', and 'Logout'. The main content area displays the patient's visit history, including upcoming visits and a list of past visits with dates, times, and statuses (e.g., 'Success (Kort Call)'). A 'Visit Note' section is also visible, showing a 'CONSULTATION REPORT' for Tony Zhang, including patient details, encounter date, and CPT codes.

### 3.4. Surveys & Materials

This feature allows you to send surveys and educational materials to your patients.

The screenshot shows the 'Surveys & Materials' tab for patient Kris Park (M/30Y). The interface includes a sidebar with navigation options. The main content area displays a list of surveys, including 'Patient Report Outcome Survey', 'Patient Satisfaction Survey', 'Homecare Effectiveness Assessment (30 days after discharge)', 'Patient-Specific Functional Scale', and 'Oswestry Low Back Pain Questionnaire'. A 'Materials' section is also visible, showing 'Patient Education' and 'Wellness package'. A line chart titled 'Patient Report Outcome Survey' displays data for 'Pain and Productivity' over time, with a legend indicating different survey metrics.

#### 3.4.1. Survey

All the survey templates in the survey list are ready to use with no additional cost. BlueJay provides services to help the users digitalize surveys.

You can find more details about the digitalization service in section 8.1- Clinic Library.

Prescribe Survey

1. Select 2. Schedule

Select From Survey:

- Functional Care and Lites...
- Quality Of Life Scale (QO...
- Patient Satisfaction Surv...
- Homecare Effectiveness As...
- Intake Form - Dallas Pain...
- Patient Report Outcome Sc...
- Pelvic Symptom
- Pelvic Improvement Survey
- Bladder Symptoms
- Psychological State Measu...

Functional Care and Lifestyle Plan

Next

Functional Medicine Prescription and Lifestyle Plan

Patient Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**Functional Nutrition Plan**

**Functional Nutrition**

- ☐ Phytomyces Spectrum
- ☐ Core Food Plan (CFP)
- ☐ Vegan ☐ Vegetarian

**First Step Interventions**

- ☐ Concomitantly Food Plan
- ☐ Elimination Diet
- ☐ Food Reintroduction

**Advanced Interventions**

- ☐ Stress Food Plan
- ☐ Micro Food Plan
- ☐ BioNew Food Plan

**Personal Dietary Recommendations**

Macronutrient Distribution (P/F/C): ☐ 20/30/50 ☐ 25/30/45 ☐ 30/30/40 ☐ 30/45/25 ☐ 30/60/30

Target Calories: ☐ 1000-1200 ☐ 1200-1400 ☐ 1400-1600 ☐ 1600-2200 ☐ 2200-2800

Intermittent Fasting: ☐ Yes ☐ No Target Calories per day: \_\_\_\_\_ Frequency: \_\_\_\_\_ times per week

Other Recommendations: \_\_\_\_\_

**Lifestyle Plan**

**Sleep:**

**Stress:** Risk Assessment: ☐ Low Risk ☐ Medium Risk ☐ High Risk

Clearance: ☐ Yes ☐ No

Exercise	Frequency	Cardio/Aerobic	Strength/Resistance	Flexibility/Stretching	Balance
<b>1 - Frequency</b>					
<b>2 - Intensity</b>					
<b>3 - Time/Duration</b>					
<b>4 - Type</b>					

### 3.4.2. Materials

The “Patient Education” tool helps to increase adherence to medication and treatment. It ensures continuity of care and reduces medical complications.

Click the “Prescribe Materials” button in the “Materials” section as shown in the image below.

BluejayENGAGE

Andrew Willson (Test Patient) ( M/28Y )

My Patients: Andrew Willson (Test Patient) Access Code: K7P8709Y1

Dashboard Dr (MR) Goal & Outcomes Visits & Reports Surveys & Materials Care Team & Referral Concierge Package

Survey: 1 reports Owestry 2.0

Prescribe Survey

Materials

Prescribe Materials

Pain Management

Owestry 2.0

Survey Name: Owestry 2.0

Patient: Andrew Willson (Test Patient)

Provider: Bluejay Therapist

Prescribed Date To: Andrew Willson (M/27, 30/27)

Prescribed Date: 04/27/2024

25

20

15

10

5

0

Jan 27, 2024

Note: Click on the bar chart to view the detail of survey.

Select a folder from your clinic library. Drag the materials that you want to send to the right-hand side. Click “Next” to go to the schedule page.

You will find more information on how to upload educational materials to your clinic library in the chapter – 8.1 Clinic Library.

Prescribe Material

1. Select 2. Schedule

Select From Clinic Library

Drag Material To Queue

Search clinic library

Wellness Program

PDF

Lower Back Pain

MP3

Mindful Breathing Meditation

PDF

KITCHEN

Meal Plan

Queue ( 2 materials)

1. Lower Back Pain

2. Meal Plan

Add all of your desired materials in queue, and press next to set up for each material.

Next



Enter the name of this service/program. You can schedule this service to be sent on a particular date. If you want to create recurring events, please set up the time range and the frequency. BlueJay system will send the materials and reminders based on your settings.

### 3.5. Care Team & Referral

The “Care Team” module promotes a patient-centered place for different types of providers to communicate and collaborate in a timely manner.

Select “Add Member” to invite a healthcare provider or a caregiver to this patient’s care team. Select a team member from the list to start a conversation.

Fill in the required information, then click “Next”.

You can modify the invitation, select the consent check box before sending it out.

**Add Care Team Member**

1. Search from Contacts & Clinic or Invite Member 2. Compose Invitation

**Compose Message**

Hi Dr. Smith,  
I'd like to add you to Mr. Willson's care team.  
Bluejay Clinic

**Consent \*** ☒ I have received patient's consent to add care team member(s).

Back Done

Click "Refer Out" option if you are referring the patient to a different clinic for further treatment. It will remove the patient from your patient list.

**BlueJay ENGAGE**

Andrew Willson (Test Patient) ( M/28Y )

My Patients / Andrew Willson (Test Patient)  
Access Code: KP38709V1

Dashboard Dx ( N/A ) Goal & Outcomes Visits & Reports Surveys & Materials **Care Team & Referral** Concierge Package

**Care Team** Add Member Refer out

Name	Provider Type	Specialty	Clinic	Email	Phone	Referring Provider
Demo Bluejay	Physical Therapist (P.T.)	General	Bluejay Health Org	demo@bluejayhealth@gmail.com	520-555-0100	No
Dr. Willson	Physical Therapist (P.T.)	Orthopedics	Bluejay Demo Clinic	dr.willson@bluejaydemo.org		No

Chat With Demo Bluejay

Write your message here...

### 3.6. Concierge Package

BlueJay Concierge Program helps you to increase the revenue while providing enhanced care.

Select the "Assign Concierge Package" button

**BlueJay ENGAGE**

Andrew Willson (Test Patient) ( M/28Y )

My Patients / Andrew Willson (Test Patient)  
Access Code: KP38709V1

Dashboard Dx ( N/A ) Goal & Outcomes Visits & Reports Surveys & Materials Care Team & Referral **Concierge Package**

**Concierge Package**

Current

Andrew Willson (Test Patient) is currently not enrolled in any concierge package. Would you like to assign one now?

Assign Concierge Package

Past

Choose a package from the menu and define the units. Tap on “Subscribe Patient” when you are ready.

Please note that BlueJay will not handle the billing process; you can charge your patients through your clinic billing system.

The screenshot shows the BlueJay ENGAGE dashboard for a patient named Andrew Willson (M/28Y). The 'Concierge Package' tab is selected. A 'New Concierge Package' form is displayed, with a red box highlighting the selection of 'Discharge wellness Monthly Subscription - per month' and a unit of '6 Month(s)'. The recurring monthly subscription fee is listed as '\$30.00'. The 'Subscribe Patient' button is visible in the top right corner of the form.

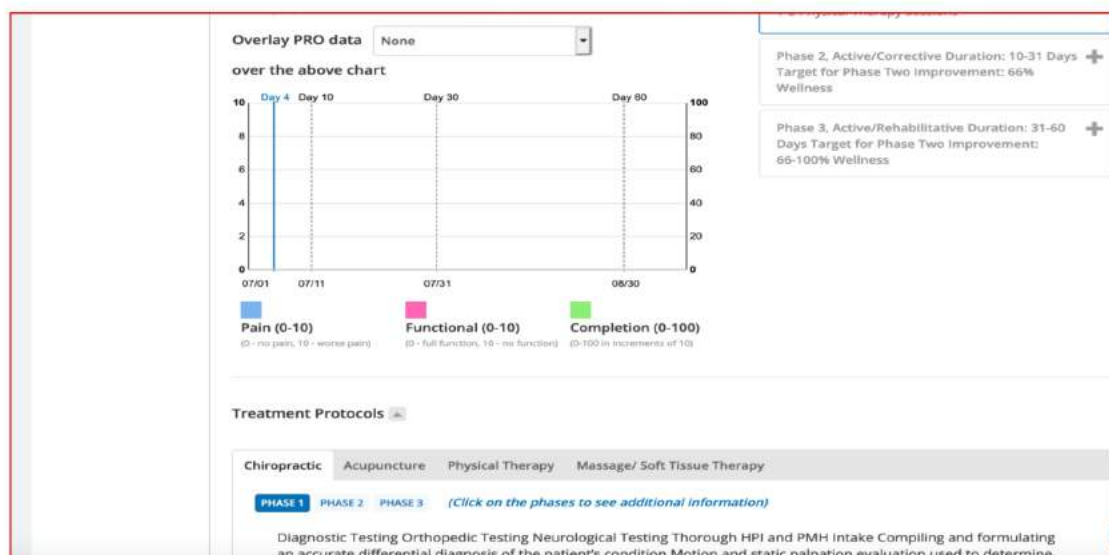
Once the package is sent, you can either directly schedule the visit with the patient or schedule the visit later.

The screenshot shows a confirmation screen for the 'Wellness Monthly Subscription'. It features a green checkmark icon and the text 'Concierge Service Package Assigned!'. Below this, it states: 'Congratulations, you have assigned Wellness Monthly Subscription to Bluejay Test Patient. Bluejay Test Patient will receive a confirmation Email of this assignment in a moment.' Two buttons are present: 'Yes, Schedule visit now' and 'No, I will schedule later'.

Click “Export Invoice” button to generate the invoice. The invoice will be generated as a PDF for you to collect payment through your medical billing system or your own merchant services/credit card service.

The screenshot shows the BlueJay ENGAGE dashboard for a patient named Andrew Willson (M/28Y). The 'Concierge Package' tab is selected. The 'Wellness Program' is listed under the 'Current' tab. The details include: Service / Package name: Wellness Program, Service / Package fee: \$900.00, Assign units: 3 Month(s), Start date: Jul 27, 2021, and Service includes: 1 Video Visit, per Month, Messages Consultation, Home Geriatric Program. The 'Export Invoice' button is visible at the bottom.





**Treatment Protocols**

Chiropractic Acupuncture Physical Therapy Massage/ Soft Tissue Therapy

**PHASE 1** PHASE 2 PHASE 3 *(Click on the phases to see additional information)*

Diagnostic Testing Orthopedic Testing Neurological Testing Thorough HPI and PMH Intake Compiling and formulating an accurate differential diagnosis of the patient's condition Motion and static palpation evaluation used to determine levels requiring manipulation. Gentle manual manipulation required.

**Epidemiology / Risk Factors**

Incidence Age Site Risk Factors/Complicating Factors Presentation Common Differential Diagnosis Imaging

Medical Intervention

(Population that may have diagnosis) Tension-type headaches (TTH) are common, with a lifetime prevalence in the general population ranging between 30% and 78% in different studies. They affect approximately 1.4 billion people or 20.8% of the population

## 4. Manage Region and SNF (For Skilled Nursing Facility Users)

BlueJay SNF module skillfully keeps the track of all the provider-patient activities. It assists in organizing and scheduling video visits and other operations.

### 4.1 Region (Organizational Admin Only)

As an organizational admin, you can easily view the list of providers and SNF's in any region.

To add a new region in the list, click "Add Region" on the top right corner of the page.



**Manage Region & SNF**

Region Providers SNF SNF Providers Patients

Search Region By Name [Add Region](#)

Region Name	Address	Providers	SNF	Action
Bluejay Health	4460 Rosewood Dr STE 250	<a href="#">View Providers</a>	<a href="#">View SNF</a>	<a href="#">Edit</a>
Bluejay SNF	3126 2nd Ave	<a href="#">View Providers</a>	<a href="#">View SNF</a>	<a href="#">Edit</a>
CA - San Francisco	2133 Fulton St	<a href="#">View Providers</a>	<a href="#">View SNF</a>	<a href="#">Edit</a>
MA- Boston	8712 Locust St	<a href="#">View Providers</a>	<a href="#">View SNF</a>	<a href="#">Edit</a>
NY- New York City	225 5th Ave	<a href="#">View Providers</a>	<a href="#">View SNF</a>	<a href="#">Edit</a>
OR - Portland	3146 2nd Ave	<a href="#">View Providers</a>	<a href="#">View SNF</a>	<a href="#">Edit</a>
TX- Dallas	5271 North Main St	<a href="#">View Providers</a>	<a href="#">View SNF</a>	<a href="#">Edit</a>
CA - Los Angeles	2123 Jackson St	<a href="#">View Providers</a>	<a href="#">View SNF</a>	<a href="#">Edit</a>
CA- San Jose	6282 Irving St	<a href="#">View Providers</a>	<a href="#">View SNF</a>	<a href="#">Edit</a>
NY - Brooklyn	1282 Nets Way	<a href="#">View Providers</a>	<a href="#">View SNF</a>	<a href="#">Edit</a>

First 1 Last

Enter the name of the region and the physical address. Click “Save” to create this region.

**Add Region**

Region Name \* : CA- Bay Area

Region Address \* : 1246 Main St

[Save](#)

## 4.2. Providers

The “Providers” tab allows you to add new providers with respect to their specific region, SNF, user role, admin access control and more.

Providers can be of two types: Program Manager/Facilitator and Regular Therapists.



To add a new provider, select “Add Provider”.

**Manage Region & SNF**

Region/Organization: CA - San Francisco

My Account / Manage Region & SNF

Region Providers SNF SNF Providers Patients [Active](#) [Deleted](#) [Search Provider](#) [Bulk Upload](#) [Add Provider](#)

Email	Provider Name	Region	Assigned SNFs	User Role	Admin	Action
sfnf2@grr.la	Natalie Quizon	CA - San Francisco	Outer Sunset	Facility Program Manager/Facilitator	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Assign SNF</a>   <a href="#">Assign Region</a>
sfnf1@grr.la	Ronny Jones	CA - San Francisco	Inner Richmond	Physical Therapist (P.T.)	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Assign SNF</a>   <a href="#">Assign Region</a>
sfnf1@grr.la	Bob Smith	CA - San Francisco	Inner Richmond, Outer Sunset	Facility Program Manager/Facilitator	<input checked="" type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Assign SNF</a>   <a href="#">Assign Region</a>

First 1 Last

Fill in the required information. Select the check box “Allow Regional Admin Role” to set up a regional admin account. A regional admin can add/manage the providers in his/her assigned region.

Add Provider

Organization Name :

BlueJay Demo

Add/Select Region\* :

CA - San Francisco

First Name\* :

Emma

Last Name\* :

Smith

Email\* :

emma.smith@grr.la

☐

Onsite in the SNF

User Type (DD)\* :

Occupational Therapist (O.T.)

Speciality\* :

General

Cell Phone :

US (+1)

Cell Phone

License Number :

License Number

☒

Allow Region Admin Role? (Region Admin Role if checked, will have the authority to add more therapist under the same region.)

Add to Subscription

### 4.3. SNF

The “SNF” tab allows you to keep track of your SNFs alongside the lists of providers and patients.

To add a new SNF, simply click “Add SNF” then enter the name and the address of the building.

BlueJayENGAGE

BlueJay Therapist

My Patients

Manage Region & SNF

Messages

Patient Call Request

Event Schedule

Favorites

Library & Document

My Account

Performance

Help

Logout

Manage Region & SNF

Region/Organization: CA - San Francisco

My Account / Manage Region & SNF

Region

Providers

SNF

SNF Providers

Patients

Search SNF By Name

Add SNF

SNF Name	Address	Region	SNF Provider	Patients	Action
Inner Richmond	2316 Geary St	CA - San Francisco	<a href="#">View Providers</a>	<a href="#">View Patients</a>	<a href="#">Edit</a>
Outer Sunset	2134 32nd Ave	CA - San Francisco	<a href="#">View Providers</a>	<a href="#">View Patients</a>	<a href="#">Edit</a>

First

1

Last

Add SNF

Region:

CA - San Francisco

SNF Name\* :

Motion Rehab

SNF Address\* :

1243 Hayes St

Save

## 4.4 SNF Providers

The “SNF Providers” tab provides more details of providers who work in a particular SNF.

The screenshot shows the 'Manage Region & SNF' interface with the 'SNF Providers' tab selected. The left sidebar contains navigation options: My Patients, Manage Region & SNF, Messages, Patient Call Request, Event Schedule, Favorites, Library & Document, My Account, Performance, Help, and Logout. The main content area displays a table of SNF providers for the 'CA - San Francisco' region. The table has columns for Email, Provider Name, Region, SNF, User Role, Admin status, and Action. There are four rows of data. Below the table is a pagination control showing 'First', '1', and 'Last'.

Email	Provider Name	Region	SNF	User Role	Admin	Action
snfpt1@grr.la	Rorrry Jones	CA - San Francisco	Inner Richmond	Physical Therapist (P.T.)	✓	
snf11@grr.la	Bob Smith	CA - San Francisco	Inner Richmond, Outer Sunset	Facility Program Manager/Facilitator	✗	
snf22@grr.la	Natalie Quitzen	CA - San Francisco	Outer Sunset	Facility Program Manager/Facilitator	✗	
snf11@grr.la	Bob Smith	CA - San Francisco	Inner Richmond, Outer Sunset	Facility Program Manager/Facilitator	✗	

## 4.5 Patients

The “Patients” tab displays the list of patients with respect to their name, DOB, region and SNF.

Select “Add Patient” to add a new patient. Fill in the required details and select a onsite SNF from the dropdown menu. Then click “Save”.

The screenshot shows the 'Manage Region & SNF' interface with the 'Patients' tab selected. The left sidebar is the same as in the previous screenshot. The main content area displays a table of patients for the 'OR - Portland' region. The table has columns for Patient Name, DOB, Region, SNF, and Action. There are two rows of data. Below the table is a pagination control showing 'First', '1', and 'Last'. An 'Add Patient' button is visible in the top right corner of the main content area.

Patient Name	DOB	Region	SNF	Action
Bobby Smith	Apr 05, 1960	OR - Portland	OR-SNF1	Assign SNF Clinic   Assign
Luke Goodwin	Apr 07, 1956	OR - Portland	OR-SNF1	Assign SNF Clinic   Assign

The 'Add Patient' form is displayed, showing fields for patient information. The fields are: First Name (jane), Last Name (Smith), Cell Phone (US (+1) 000-687-5454), Email (jane.smith@grr.la), Country (United States), State (California), Zip Code (95481), and Birthday (June 30, 1990). There is a checkbox for 'Onsite SNF' which is checked, and a dropdown menu for selecting the SNF (OR-SNF1). A 'Save' button is located at the bottom right of the form.

First Name \*  
jane

Last Name \*  
Smith

Cell Phone  
US (+1) 000-687-5454

Email  
jane.smith@grr.la

Country \*  
United States

State \*  
California

Zip Code \*  
95481

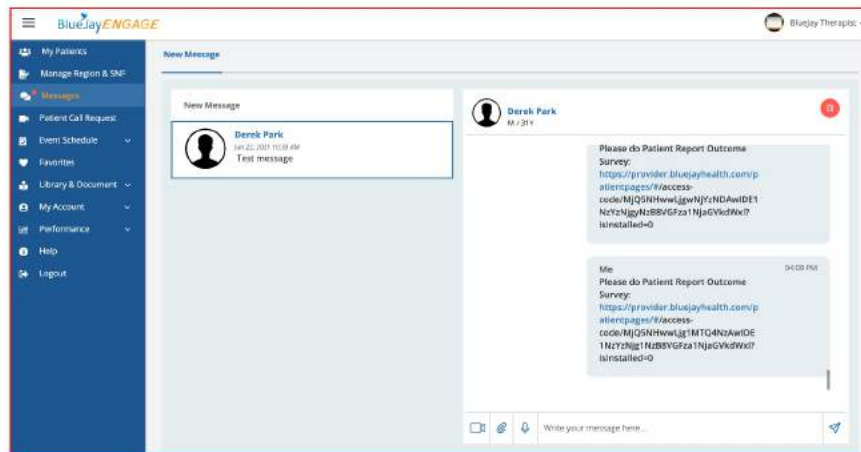
Birthday \*  
June 30, 1990

☒ Onsite SNF  
OR-SNF1

Save

## 5. Messages

Check your “Messages” box for unread messages and your latest conversation threads. You can send documents, voice recordings, or start a quick video call from this page.

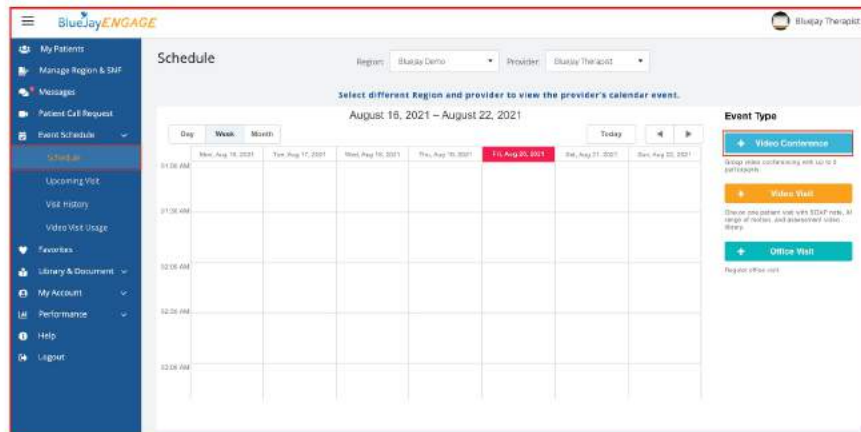


## 6. Event Schedule

### 6.1. Schedule

To schedule an appointment, go to “Schedule”, select an item under the “Event Type”.

To schedule video conference, click ‘+ Video Conference’ as shown in the image below.



You will be asked to enter patient’s info, appointment date, appointment time, and the duration of the visit. Click “Save” to schedule the meeting.

Cancel

Save

Appointment Type \*

Video Conference

Region \*

BlueJay Demo

Provider \*

BlueJay Therapist

☒ Inpatient ☐ Outpatient

Select Facility \*

Select or Search Facility

Select Facility Program Manager/Facilitator \*

Select or Search Facility Manager

☒ Include Patient in conference

Select Patient \*

Select or search a patient in the list

[+ Add New Patient](#)

Patient Phone

Notes

400 remaining

Now a new pop-up window will appear notifying the successful appointment creation. You can invite other meeting participants by sending the meeting link via email, text message or BlueJay In-App messages.

**BlueJay Engage: Success** X

Appointment created successfully.

Invite Care Team?

Share this link to the careteam member(s) you would like to invite.

<https://meeting.bluejayhealth.com/room/377825532>

[Copy Link](#) or [Send Email Invitation](#)

Once the appointment is confirmed, your patient will receive the appointment information from BlueJay. Your patient can open the meeting link through BlueJay Telehealth Mobile App or access it through any of the following browsers

- Google Chrome,
- Firefox,
- Safari

Hi Kris,

This is Organizational, your health provider. **Your video conference will start in 15 minutes.**

Please click the link below to start the video call: <https://betameeting.myhomept.co/room/492799446?userName=Kris%20Park&token=67a23b005e3a3519b7591e4aadf4099a&userType=Patient>

**We recommend using computers for better experience.** Please use these browser s: Google Chrome, Firefox and Safari 11.0 or the later versions. We don't support Mic rosoft Internet Explorer. To learn more about our software, please view the [Telehealth tutorial video](#) and the [setup tips here](#).

If you have any questions, you can give me a call at: 925-400-8254

Warm Regards,

Organizational

**If you encounter any health or medical related situations, please DO contact your provider directly. DO NOT reply to this email.**

If you want to edit or delete any existing appointment, simply select the appointment from the calendar page, then a pop-up will appear as below:

Patient Edit X

Larry Synder

Visit Date and Time

Aug 14,2020 10:30 pm to 11:00 pm

Reminder

7 days, 24 hrs and 15 mins before event

Appointment Type

Video Conference

Conference Invitation

Share this link to the careteam member(s) you would like to invite.

<https://meeting.bluejayhealth.com/room/377825532>

[Copy Link](#) or [Send Email Invitation](#)

Delete Appointment



By clicking “Edit”, you can edit the details of the appointment and then click save to update the meeting schedule.

In order to delete the appointment, select “Delete Appointment” at the bottom of the pop-up window.

## 6.2 Upcoming Visit

The “Upcoming Visits” tab allows you to view a list of upcoming visits. You can also start a call from this page.

BlueJay will send three reminders per appointment via email and text message. The reminders are sent 1 week, 24 hours, and 15 minutes prior to the scheduled appointment.

The screenshot shows the 'Upcoming Visits' page in the BlueJay ENGAGE system. On the left is a navigation menu with options like 'My Patients', 'Manage Region & SNF', 'Messages', 'Patient Call Request', 'Event Schedule', 'Schedule', 'Upcoming Visits' (highlighted), 'Visit History', 'Video Visit Usage', 'Favorites', 'Library & Document', 'My Account', 'Performance', 'Help', and 'Logout'. The main content area is titled 'Upcoming Visits' and includes a 'Clinic Schedule' button. A note states: 'When the patient is in the waiting room, the "Start" button will auto light up. Otherwise, before five mins of the scheduled time, this "Start" button will light up.' There is a search bar labeled 'Search: Patient Name'. Below this is a table of upcoming visits:

Provider Name	Patient Name	Schedule Type	Meeting Room	Patient Phone#	Date & Time	Waiting Room
Bluejay Therapist	Diana Chiu	Video Conference	448168473	000-456-7835	Aug 20, 2021 @ 05:45 PM	<span>Start</span>
Bluejay Therapist	Kris Park	Video Conference	206093156	415-969-1185	Sep 01, 2021 @ 05:45 PM	<span>Start</span>

At the bottom of the table is a pagination control showing '1'.

## 6.3 Built-in Features During Telehealth Calls

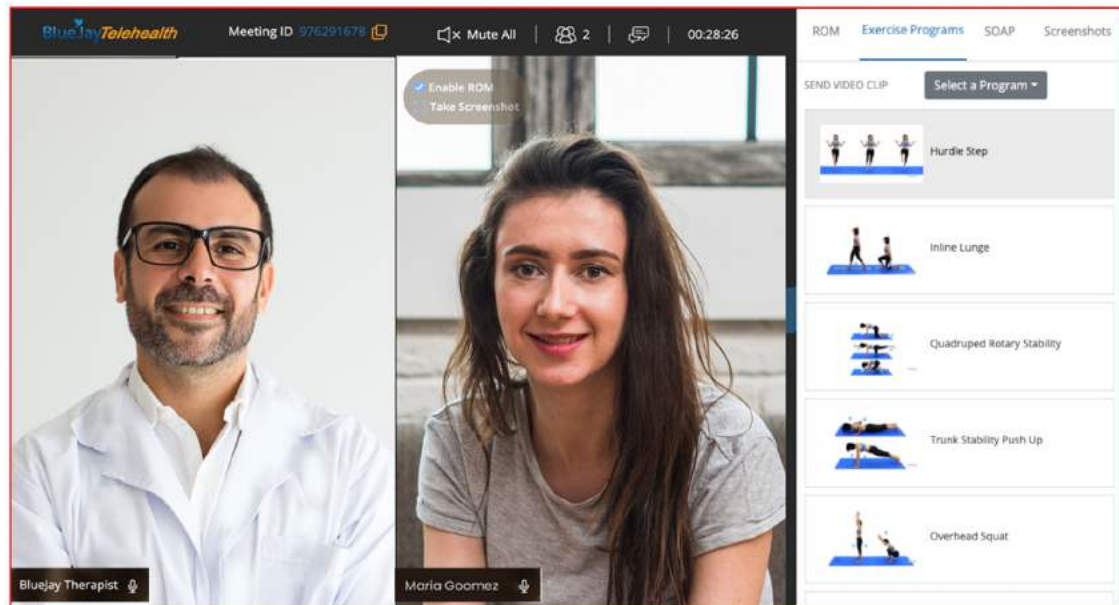
### 6.3.1 Control Panel

The control panel will appear when you move your cursor to the bottom of the screen.

The screenshot shows a video call interface with a control panel at the bottom. The top bar displays 'BlueJay Telehealth', 'Meeting ID 976291678', 'Mute All', '2' participants, a chat icon, and a timer '00:28:26'. The main area shows two video feeds: a male therapist on the left and a female patient on the right. The control panel at the bottom contains several icons: a microphone icon labeled 'Adjust Microphone', a camera icon labeled 'Adjust Camera', a red phone icon, a 'Tool Box (click here to access more features)' button, and a 'Sharescreen' button. A 'Chat Box' button is also visible in the top right corner of the video area. A red arrow points from the 'Tool Box' button to the 'Chat Box' button.

### 6.3.2. Exercise Program

During a telehealth visit, you can simultaneously send and play video clips. This tool helps you observe your patients and correct them in real-time if needed.

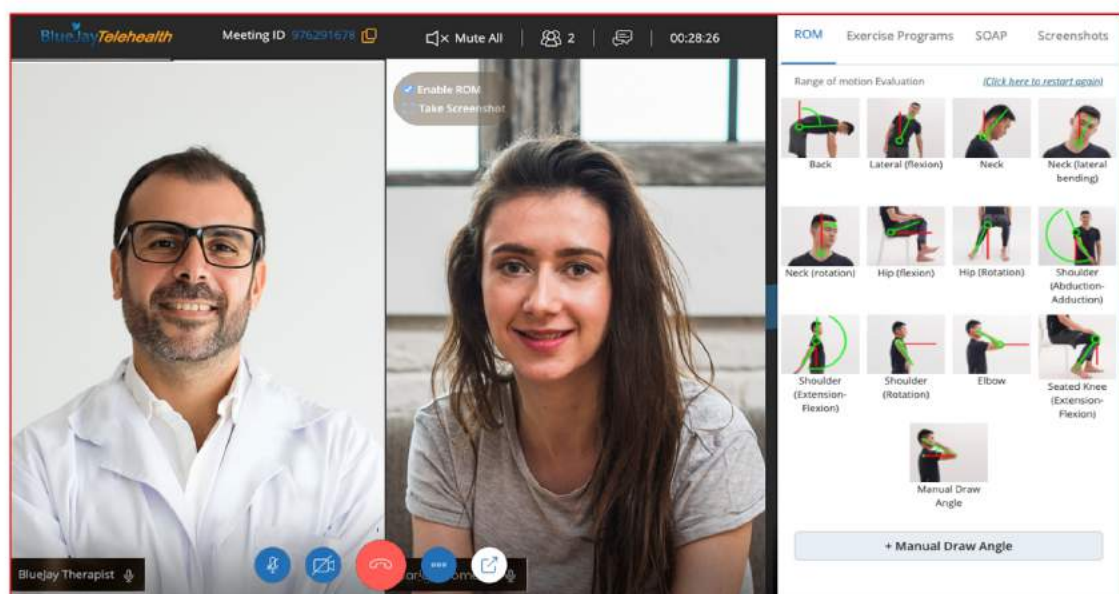


### 6.3.3 AI ROM & Manual ROM

ROM is helpful when the provider wants to measure or analyze the post-treatment effects on the body of the patient.

During the Telehealth meeting, providers can measure the range of motion by clicking the "ROM" button in the tools option.

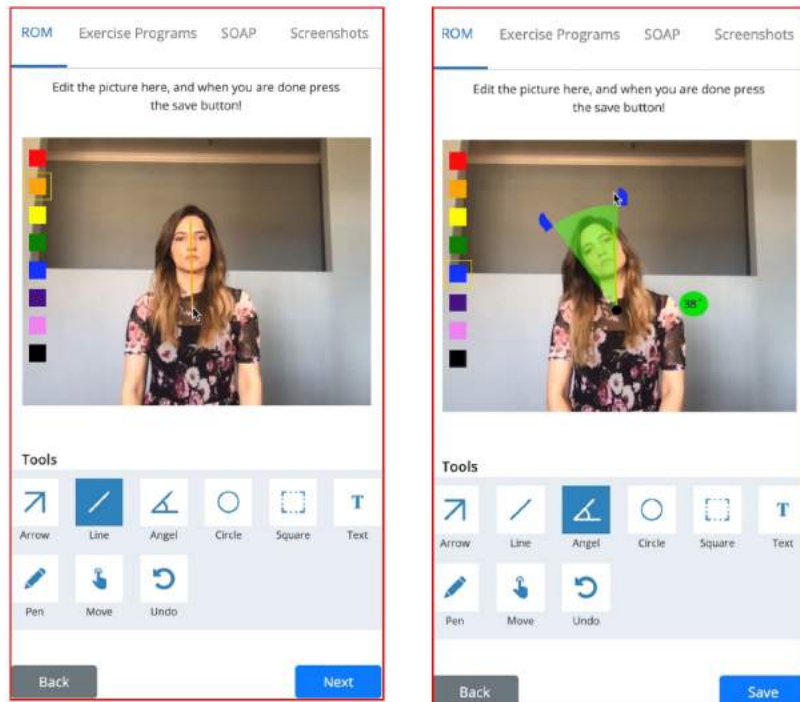
- A window showing different ROM options will appear.
- Select a joint from the AI library, then take images of the patient
- BlueJay's algorithm will scan the patient's movements and provide the real-time results



In addition to the AI-ROM, you can use the “Manual ROM” option to manually measure your patient’s range of motion.

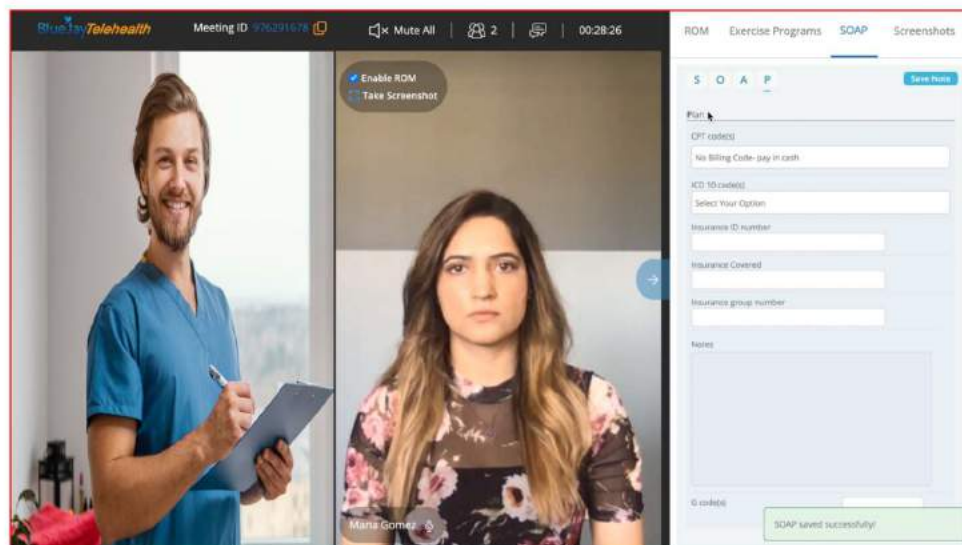
Here’s how to use the “Manual ROM” tool:

- Take a picture of the patient in the neutral position
- Use the annotation tool to draw a start line or make notes if needed
- Instruct your patient on the ROM assessment, then take another picture
- On the second picture, you will see the start line that you marked initially
- Use the “Angle” option to get the measurement result
- Now click “Save”.



### 6.3.4 S.O.A.P Notes

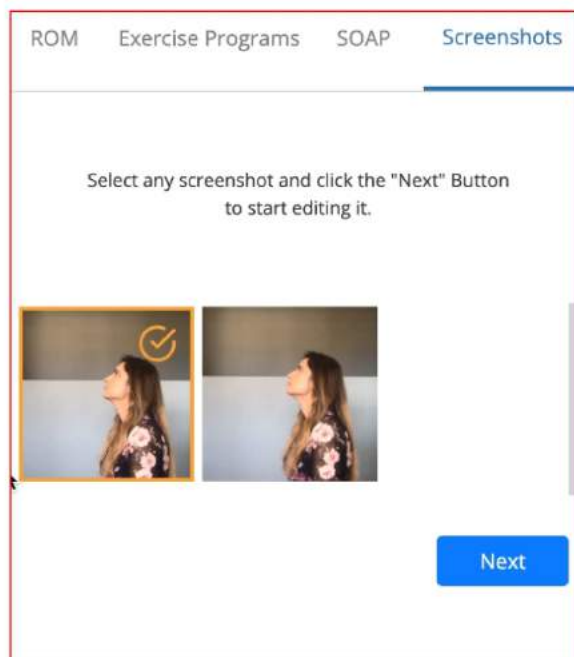
You can record S.O.A.P notes during a telehealth visit. Your S.O.A.P notes will be sent to your registered email address after the meeting.





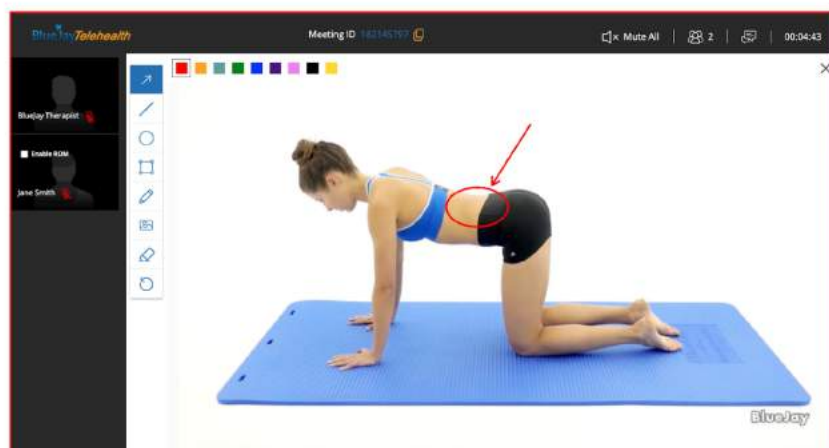
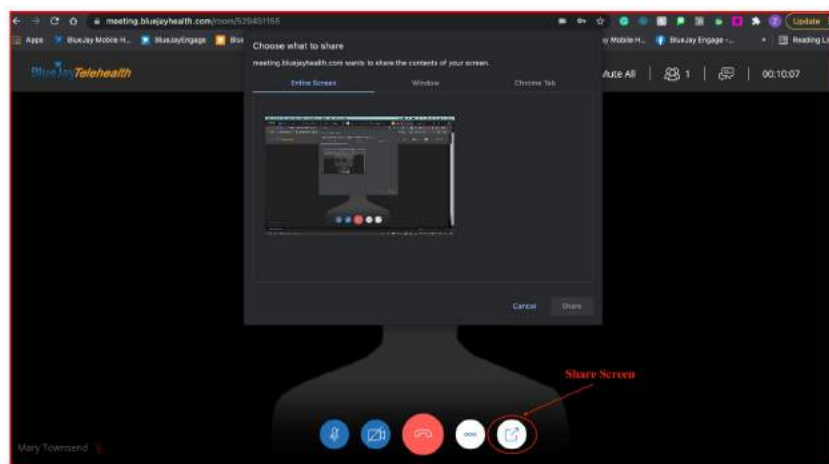
### 6.3.5 Screenshot

The “Screenshot” tab provides the capability to review saved screenshots. After the meeting, the system will send the saved documents to your email.



### 6.3.6. Whiteboard & Share Screen

You can share your screen or use the “Whiteboard” tool to annotate on any shared images during BlueJayTelehealth meetings.



## 6.4. Visit History

This feature allows the provider to view, edit, and download the notes taken during the appointments.

The screenshot shows the BlueJay ENGAGE interface for a therapist. The left sidebar contains navigation options: My Patients, Manage Region & SNF, Messages, Patient Call Request, Event Schedule, Schedule, Upcoming Visit, Visit History (selected), Video Visit Usage, Favorites, Library & Document, My Account, Performance, Help, and Logout. The main content area is titled "Visit History" and includes a date range filter (From: Mar 01, 2021 To: Aug 23, 2021) with Search and Export CSV buttons. Below the filter is a table of visits:

Date	Name	Status
Mar 12, 2021 03:00 PM - 03:15 PM	Alex Harris	No Show (Office Visit)
Mar 25, 2021 06:30 PM - 07:00 PM	Bob Smith	No Show (Office Visit)
Aug 20, 2021 04:49 PM - 05:19 PM	Derek Park	Decline (Live Chat)
Jul 01, 2021 08:00 AM - 08:30 AM	Derek Park	No Show (Conf. Call)
Jun 04, 2021 03:00 PM - 03:15 PM	Derek Park	No Show (Conf. Call)
May 20, 2021 10:40 AM - 10:55 AM	Derek Park	Success (Conf. Call)
May 12, 2021 09:15 AM - 09:25 AM	Derek Park	No Show (Conf. Call)
May 12, 2021 09:10 AM - 09:15 AM	Derek Park	Initiated (Conf. Call)
Apr 28, 2021 01:40 PM - 01:45 PM	Derek Park	Success (Conf. Call)
Apr 23, 2021 12:10 PM - 12:25 PM	Derek Park	No Show (Conf. Call)

Below the table is a "Visit Note & Records" section with a PDF icon and a "Visit Note" checkbox. To the right is a "Visit Note" section with an "Edit Report" button and a "Download PDF" button. Below this is a "BlueJay Therapist CONSULTATION REPORT" section with patient and provider information:

**BlueJay Therapist CONSULTATION REPORT**

Patient: Diana Chiu  
Date of Birth: (Age: N/A)  
Gender: Not Specified  
Home:  
Cell: 000-456-7835

Encounter Date: Aug 20, 2021  
Provider Name: BlueJay Therapist  
Consultation Duration: 30 Min  
Location:  
Patient Consent: Completed

## 6.5 Video Visit Usage

The "Video Visit Usage" report provides the list of patients who joined your telehealth meetings along with their payer type, call type, signed consent and corresponding healthcare provider.

The screenshot shows the BlueJay ENGAGE interface for a therapist. The left sidebar contains navigation options: My Patients, Manage Region & SNF, Messages, Patient Call Request, Event Schedule, Schedule, Upcoming Visit, Visit History, Video Visit Usage (selected), Favorites, Library & Document, My Account, Performance, Help, and Logout. The main content area is titled "Video Visit Usage" and includes a region filter (All Regions) and date range filters (From: Feb 01, 2021 To: May 31, 2021) with Search and Export CSV buttons. Below the filters is a table of video visit usage:

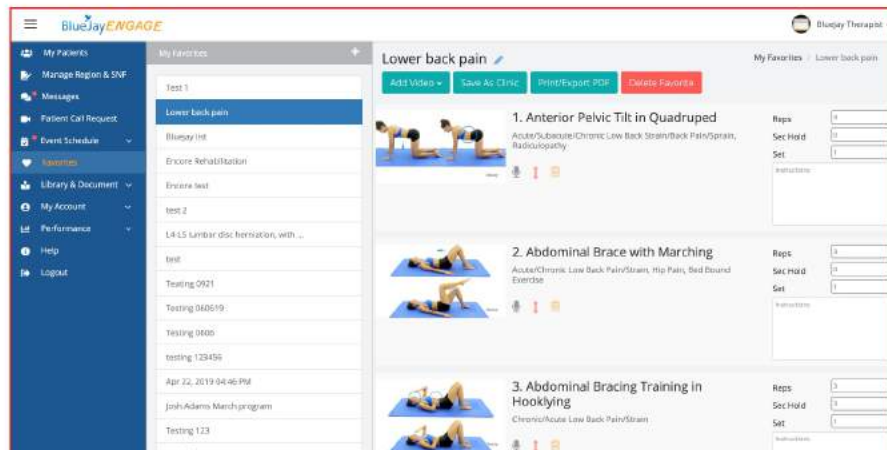
Patient Name	Payer Type	Provider	Job Role	Call Type	Start Time	End Time	Duration	Consent
DS	Private Pay	Tony Zhang	Physical Therapist (P.T.)	Video Conference	04-28-2021 08:58AM	04-28-2021 09:40AM	00:41:44	Yes
DS	Private Pay	Tony Zhang	Physical Therapist (P.T.)	Video Conference	04-27-2021 08:57AM	04-27-2021 09:17AM	00:20:02	Yes
Bobby Smith	Other	Mary Townsend	Physical Therapist (P.T.)	Video Conference	04-26-2021 03:30PM	04-26-2021 03:37PM	00:06:59	Yes
Jane Smith	Other	Test Therapist	Physical Therapist (P.T.)	Video Conference	04-26-2021 02:57PM	04-26-2021 02:57PM	00:00:12	Yes
Dr z	Private Pay	Tony Zhang	Physical Therapist (P.T.)	Video Conference	04-26-2021 08:57AM	04-26-2021 10:11AM	01:13:58	Yes
drk20z	Private Pay	Tony Zhang	Physical Therapist (P.T.)	Video Conference	04-24-2021 09:59AM	04-24-2021 11:13AM	01:13:41	Yes
Derek Park	Other	BlueJay Therapist	Physical Therapist (P.T.)	Video Conference	04-20-2021 05:56PM	04-20-2021 06:07PM	00:11:14	Yes
Jack Smith	Other	Tony Zhang	Physical Therapist (P.T.)	Video Conference	04-20-2021 10:39AM	04-20-2021 10:42AM	00:02:44	Yes
Derek Park	Other	BlueJay Therapist	Physical Therapist (P.T.)	Video Visit	04-19-2021 04:29PM	04-19-2021 04:30PM	00:01:00	Yes
Derek Park	Other	BlueJay Therapist	Physical Therapist (P.T.)	Video Visit	04-19-2021 04:26PM	04-19-2021 04:27PM	00:01:00	Yes

Below the table is a pagination bar showing "Showing 41 to 50 of 79 entries" and a "Previous" button, followed by a series of numbers (1, 2, 3, 4, 5, 6, 7, 8, Next) with the number 5 highlighted.



## 7. Favorites

This feature allows you to pre-group your favorite videos and keep them in one place.

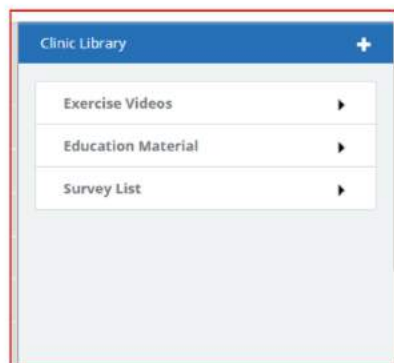


## 8. Library

### 8.1. Clinic Library

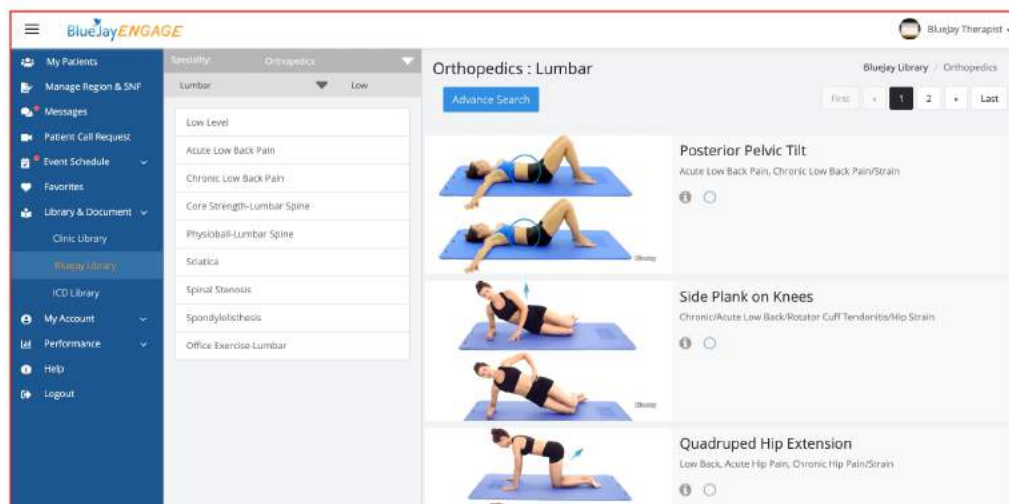
Clinic library is a collaborative working space where you can share the content with your colleagues.

You can upload your exercise videos, educational materials and surveys to the clinic library.



### 8.2. Bluejay Library

BlueJay Library comes equipped with more advanced exercise videos. These videos can be added to your favorite list and clinic library.



## 8.3. ICD library

ICD provides details of different medical diseases/conditions, overview and diagnosis methods. You can either download each document or print it according to your preference.

The screenshot displays the BlueJayENGAGE ICD library. On the left, a sidebar lists navigation options: My Patients, Manage Region & SNF, Messages, Patient Call Request, Event Schedule, Favorites, Library & Document, Clinic Library, BlueJay Library, ICD Library (selected), My Account, Performance, Help, and Logout. The main content area shows the ICD code F07.81 - Post-concussional Syndrome. Below the title, there is a list of related ICD codes: G43.009-Migraine without Aura, Not Intracta; G44.209-Tension-type headache, unspecified; G54.0-Brachial Plexus Disorders; G56.0-Carpal Tunnel Syndrome; G56.22-Lesion ulnar nerve, left upper limb; G57.01-Lesion sciatic nerve, right; G57.02-Lesion sciatic nerve, left; G89.29-Other Chronic Pain; M16.0-Bilateral primary osteoarthritis of; M16.11-primary unilateral osteoarthritis; M16.9-Bilateral primary osteoarthritis of; M22.241-Knee pain patellofemoral tracking; and M23.02-Osteopenia of anterior cruciate.

## 9. My Account

### 9.1. My Profile

You can edit your personal information in the “My Profile” section. If you are also acting as Clinic Admin/Owner, you can change the clinic’s information.

The screenshot shows the BlueJayENGAGE My Profile and Clinic Profile sections. The My Profile section on the left includes fields for Name, Email, Password, and Profile Picture. The Clinic Profile section on the right includes fields for Clinic Name, Address, Phone, Email, and Clinic Hours. Both sections have a Save button at the bottom.

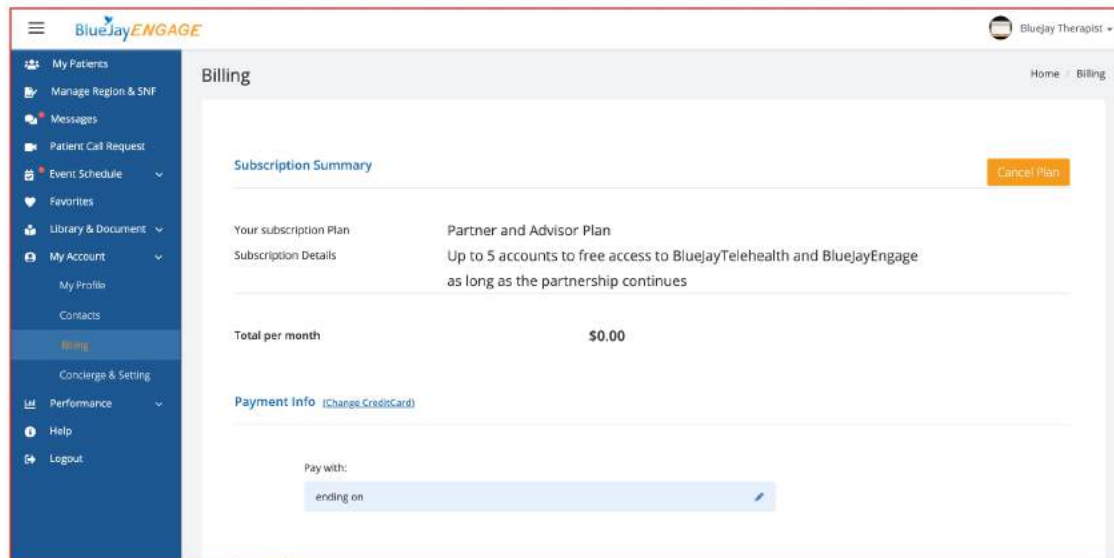
### 9.2. Contacts

The “Contacts” function allows easy access to provider’s information, which includes their email addresses, phone numbers, clinic/company info and more.

The screenshot displays the BlueJayENGAGE Contacts interface. On the left, a sidebar lists navigation options: My Patients, Manage Region & SNF, Messages, Patient Call Request, Event Schedule, Favorites, Library & Document, My Account, My Profile, Contacts (selected), Billing, Concierge & Setting, Performance, Help, and Logout. The main content area shows a list of contacts with columns for Name, Title, and Status. A detailed view of a provider is shown on the right, including fields for First Name, Last Name, Provider Type, Speciality, Language, Company / Clinic, Email, and Phone.

## 9.3. Billing

In the Billing section, you can view the list of services you signed up for. This function also gives you the capability to view and download your history invoices.



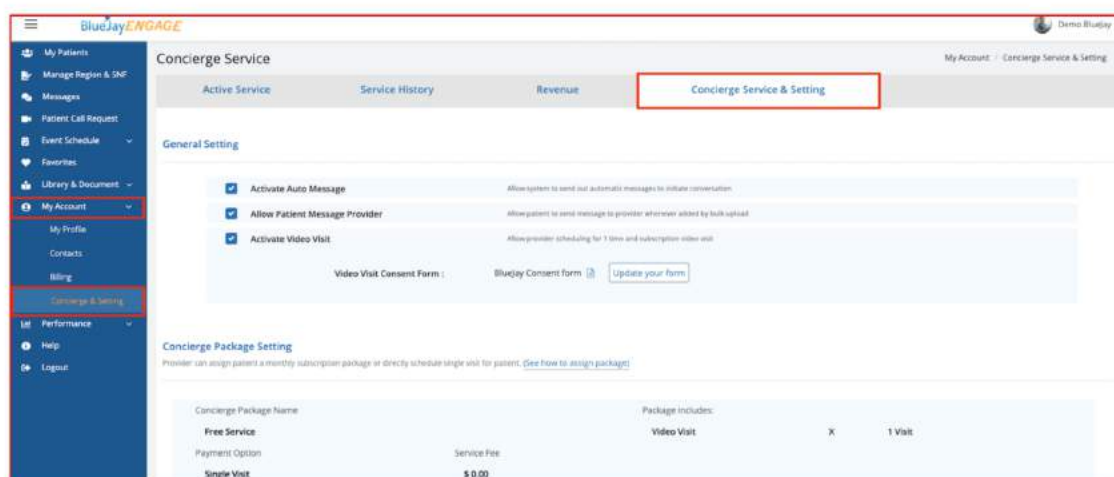
## 9.4 Concierge & Setting

You can set up your customized service packages under the “Concierge Service & Setting” tab.

BlueJay offers 3 default service packages for you:

- Free Service,
- Single Visit,
- Discharge wellness Monthly Subscription.

You can also create a new package by clicking the ‘Add Another’ button.



Service / Package Name	Service Includes:			
Free Service	Video Visit	X	1 Visit	
Payment Option	Service Fee			
Free Service	\$ 0.00			

Service / Package Name	Service Includes:				Edit
Single Visit	Video Visit	X	1 Visit		
Payment Option	Service Fee				
Single Visit	\$ 0.00				

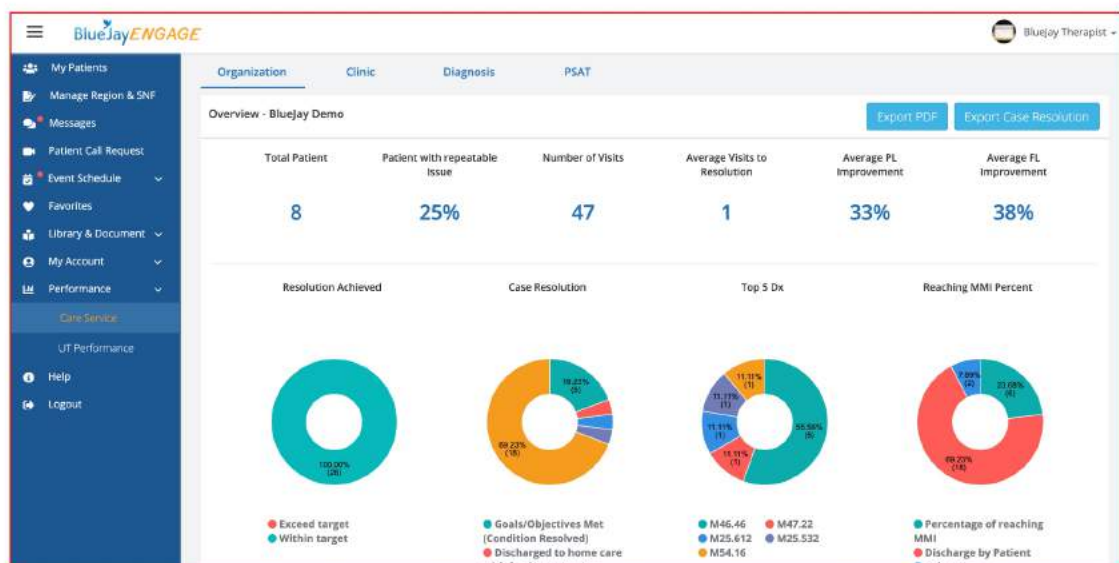
  

Service / Package Name	Service Includes:				Delete Duplicate Edit
Discharge wellness Monthly Subscription	Video Visit	X	1 Visit		
Payment Option	Service Fee				
Monthly Subscription Fee	\$ 30.00				

Add Another

## 10. Performance

The "Performance" dashboard is a management tool that allows the clinic owner/admin to keep the track of all aspects of their clinic activities. For instance, total number of patients, number of visits, clinic revenue, average improvement, etc.



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