Contribute to what moves you.

"It's a good feeling, knowing I contribute towards efforts that work to strengthen natural health."

- Natalia C.
A Remport user from Sudbury, Canada

my CHWG.com

Remport®

OUR MESSAGE TO YOU:

You are supporting natural health by being a patron

It's true, the great thing about using our product(s) is knowing that you are supporting a company that uses its profits & proceeds to support natural health solutions, innovations, and information, so that more people can exercise their health freedom with confidence.

Thank you!

Thank you

Remport ™

How to successfully set-up your practice on Remport

An exclusive guide for healthcare providers using Remport

ℹ This user guide contains step-by-step instructions and is intended to assist Remport users with setting up their accounts successfully.

Canadian Homeopathy Wellness Group is a company focused on representing the miasmatic systems of treatment through various solutions catered to its users, practitioners and organizations around the globe.

Remport is a clinic-management software platform that provides practitioners the tools to run a successful practice while making their clinic accessible through a digital directory.

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Clinic Information Submission

Once you've signed-up to create your Remport account, you'll be forwarded to the registration process where you will be need to submit details about your clinic. All the information you submit in this form will connect directly to your clinic profile (also known as your client portal). You can edit this information in the **Settings** tab later on.

Take note of the following points when going through the registration process...

- Make sure the regulatory registration number you submit is in good standing with the regulatory board in your region.

- A **Clinic Description** could be a pitch, a summary, or anything that describes your practice to potential patients or clients.

- To display any certifications and other designations on your profile, you must attach corresponding documents that provide the necessary proof for verification purposes

Awaiting Clinic Approval

Once you are finished the clinic information form and have submitted all of the information required, it is then sent to our approval team to be reviewed and processed. This process ensures that healthcare providers display valid information when offering their services on Remport.

While your account is pending approval you will have limited functionality when using Remport. Your clinic will be reviewed and processed within 48 hours. We recommend providing accurate information to avoid long approval times. If information is not valid, your account may be subject to further investigation. At this point, a customer service representative will reach out to you for more details.

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Zoom Account Integration

Connecting your zoom account will allow you to conduct your services virtually using Remport. You can connect your zoom account in the **Settings** tab under the *Virtual Connectivity* section. Attach your zoom account email where prompted and follow the steps to connect your account via our Zoom APIs.

Once the connection is complete, you are now able to conduct services virtually.

Link Your Payment Accounts

With Remport you can receive payments for your services rendered directly into your bank accounts. A customer booking your service may opt to pay-later, or pay at the time they book your service(s).

i   Remport supports payment linking to both **Square** and **Paypal**.

You can link your accounts in the **Payments** tab. Follow the prompts and confirmation process for each payment system you choose to use. Any payments from customers will show in the **Finance** tab.

> Refer to your Square or Paypal account for optimal payment tracking and other financial information from your usage on Remport that you may need

Profile Avatars

As a Remport user, you are able to upload two avatars; a profile avatar and a clinic avatar. Your **Profile Avatar** is an important element to your profile as it will become your primary visual throughout the directory platform. This avatar, also known as an image, generally includes a professional photo of you.

To upload your **Profile Avatar** , access the **Profile Management** on the top right corner while in your **Dashboard** Here you can change both your Profile Avatar and your Clinic Avatar.

Your clinic avatar will show up as your main display in your clinic profile.

ⓘ   Note that your Personal Avatar acts as your display photo on the directory.

Uploading Photos

You can showcase various images that have to do with your clinic within the **Photos** section in your profile. Visualizations are important for both patients and visitors of your clinic. You can add photos to your profile in the **Settings** tab.

Images you can upload include but are not limited to;

ⓘ Photos of your clinic

ⓘ Photos of you

ⓘ Photos of certifications

ⓘ Other images that represent your clinic

We are constantly working to enhance the flexibility within Remport to capture the unique features of your clinic. We encourage practitioners to get creative with their visuals. *See page 9 on how to create engaging visual materials for your Profile.*

ⓘ   Using images that aren't yours or aren't copy-right free can result in copyright infringement. In the event that you infringe on copyrighted material, you will have to remove said material. Canadian Homeopathy Wellness Group is not responsible for any copyright infringement.

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Creating Your Services

Creating your services is a crucial element to running your clinic successfully on Remport. Services can include consultations, appointments, sessions, etc.

To create a service, access the **Services** tab and select + *Create My New Service*. From there you will be prompted to input the following:

1 **Title of Service**
What the service is called.

2 **Service Duration**
The duration length of the service.

3 **Price Rate (CAD)**
What the price of the service is.

4 **Service Thumbnail**
The avatar image of the service.

5 **Service Handle via**
How are you conducting this service; in-person, virtually, or both?

6 **Service Theme**
Themes are customizable additions to the look of your booking system and can be changed per service.

7 **Form Attachments to Service**
Do you want to attach health forms to this service?

i You may create up to 7 services for your Profile.

Uploading Service Forms

You may want to include service forms for your patients to fill-out when booking specific services. Service forms are generally health in-take forms, but you can attach other forms to your services that you want your patients to either fill-out or read. You can connect up to 4 forms per service. Patients are able to download these forms when booking your services.

To upload a form to a specific service , simply access that service in the **Services** tab by clicking *View Service*. You will have 4 slots to upload forms to. Include a title to your form and upload its contents from your device. Once you've finished uploading a document and giving it a title, click on *Update Document*.

Uploading Your Resources

With Remport you can upload important clinic resources to your client portal to share with your patients/visitors. Resources such as educational material and publications can provide your patients with further insights, whereas resources such as service descriptions or *how-to* documents may provide further clarity.

You can upload a resource in the **Resources** tab. Once you've selected *Add a Resource (+)* you will be prompted to name the resource, upload its avatar image and either construct the resource with the given text tools or upload your resource in PDF version.

Your Schedule

Setting your schedule is crucial to getting your clinic up and running successfully. Once your schedule is set, your patients can begin booking your services.

To set your schedule, access the **My Schedule** tab. There you can select your schedule for each day (Monday-Sunday). For example, If you want to set your Monday schedule, select *Update* on the Monday row and then select All Mondays.

ⓘ   Please note that the *Specific Day* feature is not usable and will be available in a later patch.

Shift Breaks

If you want to include a break in your shift you must create *two* time slots. Your break is now the duration of time between the slots.

ⓘ   For example, if your Monday schedule contains a (10:00 -14:00) time slot and a (16:00 -19:00) time slot then you would have a break from 14:00-16:00 on Monday. In other words, there will be no time slots available for your patients to book between 14:00-16:00.

Settings Specific Days

You can set certain days on your calendar to have a specific schedule.

This can be helpful when you know a certain day during the month or year will yield a different schedule for you. You may have a busier season and would like to set different schedules for that season, or you may have certain family plans where you need more flexibility during those days.

If you want to set a specific Monday, select *Update* on the Monday row and select *Specific Monday*. You can now select the specific date and time slots for that Monday.

ⓘ   Please note that the *Specific Day* feature is not usable and will be available in a later patch.

Holidays & Vacations

You can set a vacation time for yourself by selecting the *Update My Holiday Schedule* in the top right corner when in **My Schedule**. The times you select will override your current set schedule.

Appointments

Your appointments can be accessed through the **Appointments** tab. There you will see every appointment that has been facilitated through Remport, including the date and time appointments are set to, and the patient and service associated with the appointment

Appointment Status

Appointments will have status markers depending on the status of the appointment. The status markers include *Active, Completed*, and *Cancelled.*

An *Active* status means the appointment is active and is awaiting completion. A *Completed* status means the appointment has been completed. A *Cancelled* status means the appointment was cancelled.

ⓘ   Cancelled appointments will still be displayed in the **Appointments** tab.

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Cancelling Appointments

To cancel an appointment, access the **Appointments** page and select the *Choose Status* option on the appointment you want to cancel. From the *Choose Status* option you can then select *Cancelled.*

You will then be prompted to provide a reason of cancellation which will be emailed directly to the patient's inbox. The appointment will then be changed to the *Cancelled* status, and that time slot will re-open for booking.

Starting a Virtual Appointment

To begin a virtual appointment, access the **Appointments** tab and select *Start Virtually* on the appointment you want to begin virtually. Then follow the provided steps to begin the virtual appointment.

Booking Manual Appointments

With Remport you can manually book appointments for patients. This is helpful when the patient for whatever reason isn't able to access the platform, or if you want to quickly schedule a patient for a follow-up appointment.

To book a manual appointment, access the **Services** tab and select the service you want to book the appointment with. When in the service page, select *Add a Manual Appointment*. There, you can select the date and time of the appointment you want to book and attach either an existing patient or a custom patient to the appointment.

Finance

With Remport you can track your earnings through the **Finance** tab.

Indication of Payment Methods

When booking through your client portal, patients are given the option to Pay-Later rather than providing their credit card for later payment. This simply means that the patient does not have to pay for a service through the platform.

If a patient booking your service selects the pay-later option, they are prompted with different payment methods to choose from. This does not bind the patient to pay with the chosen payment method at the time of booking, but rather is an indication of their preferred payment method. When you discuss payment with the patient, you can then be better prepared to accommodate them based on this information.

If a patient does choose the pay-later options, you can refer to the **Finance** tab to find out what their preferred payment method is for that appointment.

Editing Profile Information

At any point you want to edit your information provided in your client portal, select the **Settings** tab. You can change most of your professional information here, although some professional information changes might be subject to further investigation for verification purposes.

Editing Information Subject to Verification

If you are editing any information that needs to be verified by our information review team (registration numbers, certifications, etc.) please allow up to 2-5 business days for the edited information to be displayed.

> ⓘ Some edited information must be validated by Remport for safety purposes. Your profile may be subject to suspension until the information in question is validated.

Badges & Accolades

Remport includes a Badges & Accolades system to maintain and promote personalization on the platform. **Accolades** are achieved through usage of the platform, and **Badges** are provided to users as occupational/skill indicators. Badges and Accolades are able to be shown on your client portal as well your directory card.

How to Receive Badges

You can receive/apply for a badge through the **Badges** tab. Here you can select your desired badge depending on your skills, occupations and designations.

Please allow up to 2-5 business days for the approval process. Once approved, you will see the badge in the *Badge Settings* section located in the **Settings** tab.

Display or Hide a Badge/Accolade

You can display or hide a badge/accolade by switching between its *Public/Private* toggle in **Settings**.

Branding Your Profile/Client Portal

Remport's client portal provides a powerful yet affordable website alternative, with multiple ways to brand your practice. Avatars and visuals such as logos, clinic photos, promotions, and other branded posters are great ways to convey your brand image.

How to Improve Your Avatars

There are countless of ways to improve your avatars. You can create your own visuals with a DIY approach using friendly, no-experience-needed tools & software such as Canva.com, or if you're more experienced Adobe Photoshop may be your tool of choice.

You can also hire professional photographers or graphic designers to create more branded visuals.

The following software and platforms are great for a DIY approach on creating your own visuals and avatars:

ⓘ Canva

Canva is an Australian graphic design platform, used to create social media graphics, presentations, posters, documents and other visual content. The app includes templates for users to use.

↪ https://www.canva.com/

ⓘ Pixelied

Pixelied is a feature-rich design tool offering an extensive library of templates, photos, icons, illustrations, color palettes, and vectors.

↪ https://pixelied.com/

ⓘ Adobe Express

Adobe Express is a free online photo editor where you can easily create and share impactful images, social graphics, or animated designs that stand out on any channel, any device.

↪ https://www.adobe.com/express/feature/image/editor

ⓘ Adobe Photoshop

Adobe Photoshop is a raster graphics editor developed and published by Adobe Inc. for Windows and macOS. It was originally created in 1988 by Thomas and John Knoll. Since then, the software has become the industry standard not only in raster graphics editing, but in digital art as a whole.

↪ https://www.adobe.com/ca/products/photoshop.html

ⓘ Stencil

Stencil is a fantastically easy-to-use online graphic design tool and image editor built for business owners, social media marketers, and bloggers.

↪ https://getstencil.com/

ⓘ Unsplash

Unsplash is a website dedicated to sharing stock photography under the Unsplash license. The website claims over 265,000 contributing photographers and generates more than 16 billion photo impressions per month on their growing library of over 3.48 million photos.

↪ https://unsplash.com/

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Frequently Asked Questions

Is a patient able to cancel an appointment?

No**,** a patient cannot cancel an appointment on their end. Only you, the healthcare provider, can cancel an appointment.

If a patient has booked an appointment with you and wants to cancel that appointment, they must do so by contacting you and have you cancel the appointment using the *cancel appointment* feature located in your **Appointments** tab.

How can I provide new patients with information regarding my treatments?

You can communicate information with patients and visitors through resources. For example, you can guide new patients through the various processes and treatments associated with your practice by creating an appropriate resource for them.

For example, creating a Resource titled "*New Patient Guide,*" that explains what new patients can expect from starting a homeopathic treatment will make a big difference in how they approach booking your services.

Can I change my availability times on the fly?

Yes, by going to the **My Schedule** tab, you can either edit your available time-slots, add or remove available time-slots, or *close* a specific day. Closing a day will disable patients the ability to book your services on that day. You can always re-open a day to allow booking.

Can I hide/display certain badges on my profile?

Yes, you can make any badge or accolade you have *visible* or *private* in the **Settings** tab under *Badge Settings.*

Am I able to connect my Remport client portal to my website via API support?

No, Remport does not provide APIs that connect your client portal directly to websites.

If you have a website that you want to advertise, you can provide a link to it in your client portal.

What's the difference between a *Profile Avatar* and a *Clinic Avatar?*

Your *Clinic Avatar* refers to the main photo on your client portal whereas your *Profile Avatar* will show up on your directory card. As the platform grows, your *Profile Avatar* will be used for more purposes.

Both clinic and profile avatars can be the same in the event you want to keep a consistent image throughout the platform.

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If you are looking for more information relating to Remport, please check the FAQ section on https://mychwg.com/faqs or contact our support team by opening up a support inquiry at www.mychwg.com/contact-us