

**evitas**  
all your health

# Getting Started with Evitas HCP Help Guide

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## Welcome

Welcome to Evitas, an online platform providing you and your patients a confidential, fast and simple system for combining and storing health records, test results, medical information, appointments, rapid communication, and more.


Evitas brings your patient's health records and information together from multiple sources in a single place giving you a complete picture of their health online. Patients and healthcare professionals can share the platform to ensure that accurate up to date health information is available to everyone.

## Key Features of Evitas

1. You can connect directly with patients and share medical data, referrals, clinic letters, results and more in one secure online platform ensuring everyone involved in the patient's care has the full picture.
2. Enables correct and accurate information to be shared between patient and HCP.
3. The ability for both you and patients to arrange appointments, upload information and contact each other thereby reducing delays, streamlining the process and minimising workload.
4. Create a multidisciplinary team around each patient seamlessly within the platform to share relevant information and communicate directly.
5. Make use of an advanced telemedicine platform to facilitate remote consultation and MDT meetings.

Take the first step to helping your patients take control of their health by registering with Evitas.

All fields with an \* are mandatory fields.

Where you see this  symbol, it indicates help information.

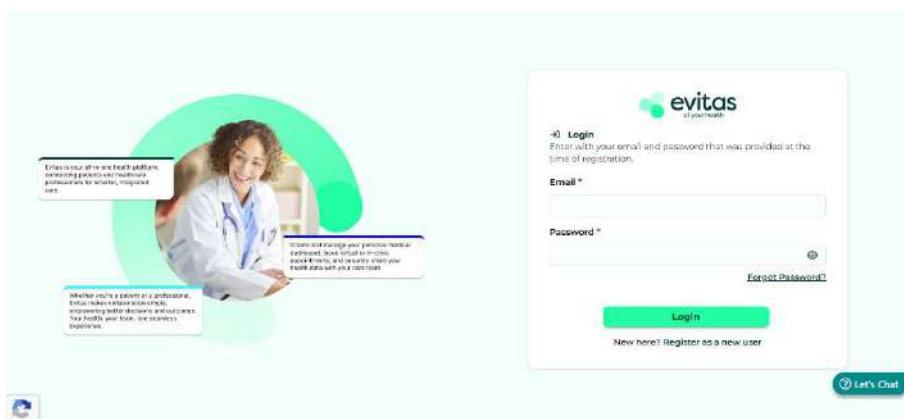
## Registering with Evitas

You can register on Evitas whether you have patients using the platform or not. This ensures that you are on the platform if/when any patients are referred to you.

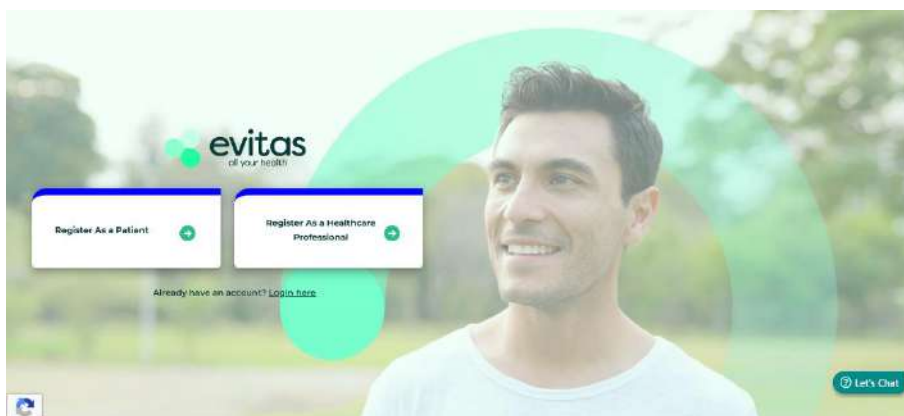
Alternatively, you may receive an **Invite to Connect** from a patient who is already in your care.

## Registering Independently

- Open your browser and go to <https://prod.allmyhealth.co.uk/>. You will see the login option on the homepage.
- Click on **Register as a New User**



- You will be taken to a screen giving you the option to register as a **Patient** or a **Healthcare Professional**.



- Select the **Register as a Healthcare Professional** option by clicking on the green arrow. You will then be taken to a screen where you need to complete five different sections:
  1. Personal Information
  2. Professional Information

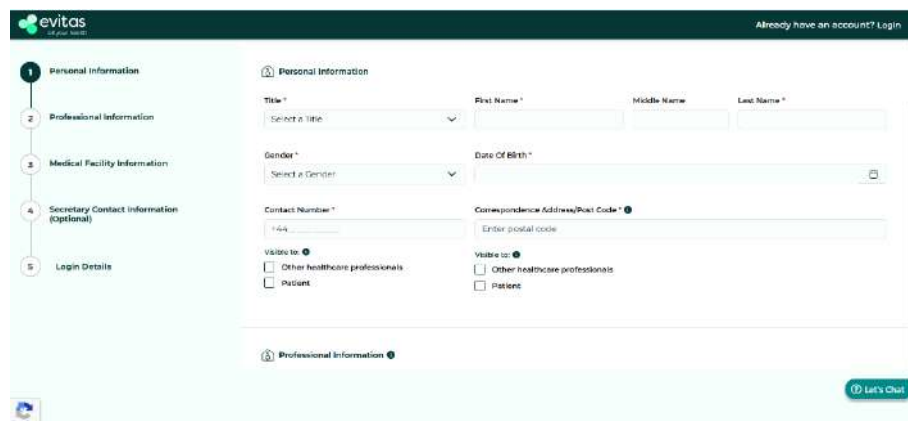
3. Healthcare Facility Information
4. Secretary Contact Information
5. Account Information

You have the option to upload a personal photograph, click on **Upload Image**, this will take you to your computer where you can select an appropriate image. The maximum upload image size is 900kb

Any fields marked with a red asterisk (\*) are mandatory and need to be completed.

Throughout the platform, you will find icons like **(i)**. By clicking these icons, you can view short descriptions of the field, its requirements, and useful links that you can browse to better your understanding.

## Section 1 - Personal Information



The screenshot shows the 'Personal Information' registration form on the Evitas platform. The form is divided into several sections: 'Personal Information', 'Professional Information', 'Medical Facility Information', 'Secretary Contact Information (optional)', and 'Login Details'. The 'Personal Information' section is currently active and contains the following fields: 'Title\*' (a dropdown menu), 'First Name\*', 'Middle Name', and 'Last Name\*'. Below these are 'Gender\*' (a dropdown menu), 'Date of Birth\*' (with a calendar icon), 'Contact Number\*' (with a '+44' prefix), and 'Correspondence Address/Post Code\*' (with a 'Enter postal code' prompt). There are two 'Visible to:' sections, each with checkboxes for 'Other healthcare professionals' and 'Patient'. A 'Let's Chat' button is located at the bottom right of the form.

Complete the following fields with your personal information:

- Title.
  - Select a title from the drop-down menu.
- First Name, Middle Name and Last Name.
- Gender.
- Date of Birth.
  - Click on the calendar icon and select the correct date, month, and year.
- Correspondence Address/Postcode
  - Start to type in your address or postcode and a drop-down menu will appear for you to select your address.
- Visibility
  - You have the option to make your contact number or address/postcode visible to other HCP's and Patients. Check the appropriate box.

## Section 2 – Professional Information

The screenshot shows the 'Professional Information' form in the Evitas system. The form is part of a multi-step process, with 'Professional Information' being the second step. The form includes the following fields and options:

- Choose Type:** Radio buttons for 'Healthcare Professional' (selected) and 'Allied Healthcare Professional'.
- Professional Title:** Text input field.
- Specialty:** Dropdown menu with 'SELECT SPECIALTY' as the placeholder.
- Sub-SPECIALTY:** Dropdown menu with 'SELECT SUB-SPECIALTY' as the placeholder.
- GMC Number/Professional Registration Number:** Text input field.
- Clinical Interests:** Text input field with the instruction '(Press enter to add multiple names)'. There is a '+' icon to the left of the field.
- Visible to:** Checkboxes for 'Other healthcare professionals' and 'Patient'.
- Website Link:** Text input field.

A 'Let's Chat' button is located in the bottom right corner of the form area.

Complete the fields:

- Professional Type.
- Healthcare Professional or Allied Healthcare Professional.
- Professional Title.
- Specialty.
  - As you start to type, a list of options will appear, select the most relevant option.
- Sub-specialities.
  - Click on the arrow and select your preferred option.
- GMC or Professional Registration Number.
- Clinical Interest.
  - This is free text, you can add multiple interests as you would like by pressing enter after each.
- Visibility.
  - You have the option to make your profile visible to other HCPs and Patients. Check the appropriate box.
- Weblink
  - If you have your personal or official website, you can include the link here.
- Biography
  - This is a free text box that allows you to add any relevant information.

## Section 3 – Medical Facility Information

The screenshot shows the 'Medical Facility Information' form in the Evitas system. The form is part of a multi-step process, with 'Medical Facility Information' being the third step. The form includes the following fields and options:

- Choose Type:** Radio buttons for 'NHS' (selected) and 'Private'.
- Medical Facility URL:** Text input field.
- Medical Facility Name:** Text input field.
- Address/Post Code:** Text input field with the instruction 'Enter postal code'.
- Address:** A link labeled 'Add new Medical Facility' with a '+' icon.
- Secretary Contact Information (Optional):**
  - NHS Secretary Email Address:** Text input field.
  - NHS Secretary Landline Number:** Text input field.
  - NHS Secretary Mobile Number:** Text input field.

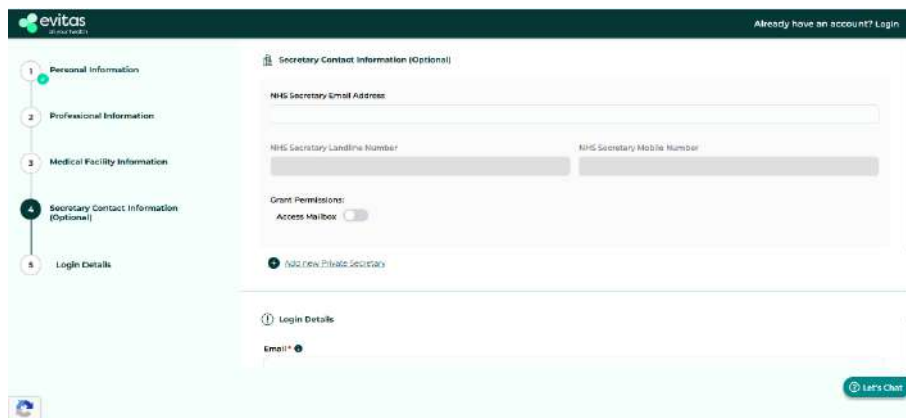
A 'Let's Chat' button is located in the bottom right corner of the form area.

Add details of the Medical Facility you practice at:

- Choose Type: NHS or Private.
- Medical Facility Website URL.
- Medical Facility Name.
- Address.
  - When you type the Address or Postcode of your practice, a drop-down menu will appear for you to select the correct address.

If you would like to add an additional Medical Facility, click on **(+) Add New Medical Facility** and complete the fields.

## Section 4 – Secretary Contact Information



The screenshot shows the 'Secretary Contact Information (Optional)' form in the Evitas system. The form is part of a multi-step process, with the current step being 'Secretary Contact Information (Optional)'. The form includes the following fields and options:

- NHS Secretary Email Address:** A text input field.
- NHS Secretary Landline Number:** A text input field.
- NHS Secretary Mobile Number:** A text input field.
- Grant Permissions:** A section with a toggle switch for 'Access Mailbox'.
- Buttons:** '+ Add New Private Secretary' and 'LAPS Chat'.
- Progress Indicator:** A vertical list on the left shows five steps: 1. Personal Information, 2. Professional Information, 3. Medical Facility Information, 4. Secretary Contact Information (Optional), and 5. Login Details. Step 4 is currently selected.

If you have an NHS Secretary and/or a Private Secretary, you have the option to include their contact details in your profile. They will then have access to your system and will be able to carry out certain functions.

Complete the following fields:

- NHS Secretary Email Address.
- NHS Secretary Landline Number.
- NHS Secretary Mobile Number.

By clicking on the **Access Mailbox** under **Grant Permissions**, you can allow your secretary to access and manage your mailbox.

You can also add a Private Secretary, click on **(+) Add Private Secretary** and complete the fields.

## Section 5 – Login Details

- In this section, you need to create your login details - Email Address and Password. You will then need to add your Password and re-enter it to confirm it.

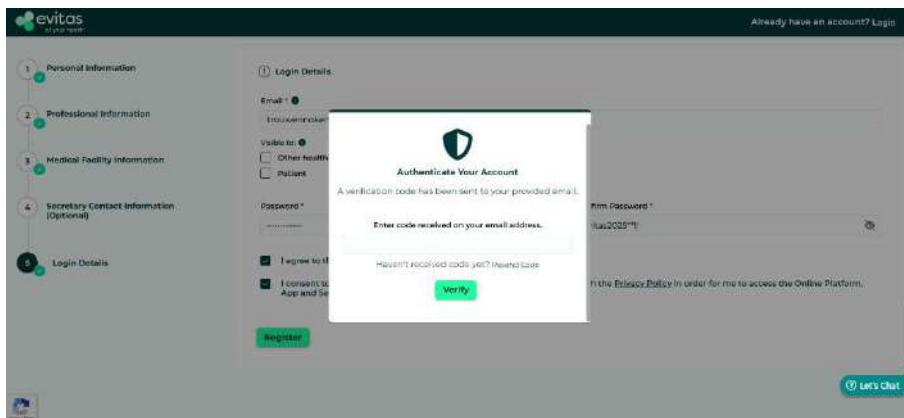
Your password must be a minimum of 8 characters and should include one upper case letter, one lower case letter, one special character and a number.

In order to use Evitas, you need to read and then agree to the **Terms of Use** and **Consent** to your data being processed in accordance with the **Privacy Policy**. These are a mandatory requirement.

- Check the box - I agree to the **Terms of Use**.
- Check the box – I consent to my personal data being processed by Evitas in accordance with the **Privacy Policy** in order for me to access the Online Platform, App and Services.
- This will be the information you will use to log in to your profile in the future. Click on **Register** and you will be sent a code to your email address which is needed to authenticate your account.

Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress with registration.

- Type in the code and click **Verify**.

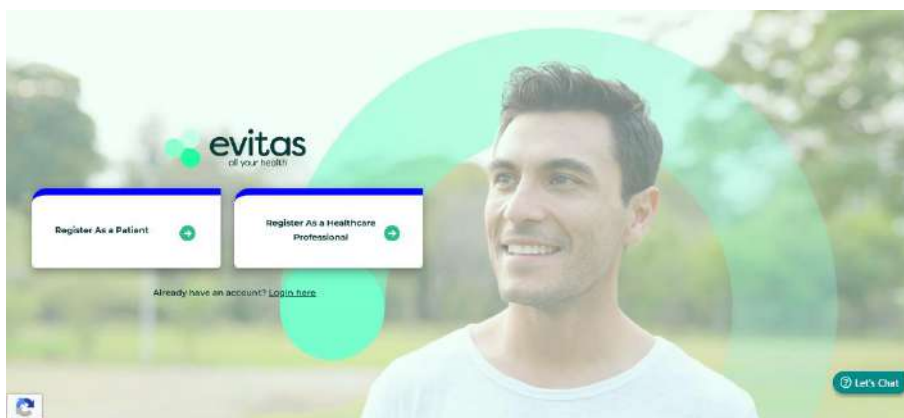


- If you do not receive a code, you can click on **Resend Code**. Once authenticated, you will be taken to the Login Screen.

## Registering after Receiving an Invitation from a Patient

Any patient registered with Evitas can send an invitation to an HCP involved in their care inviting them to join Evitas so that they can view/interact with that **Patient's Dashboard**.

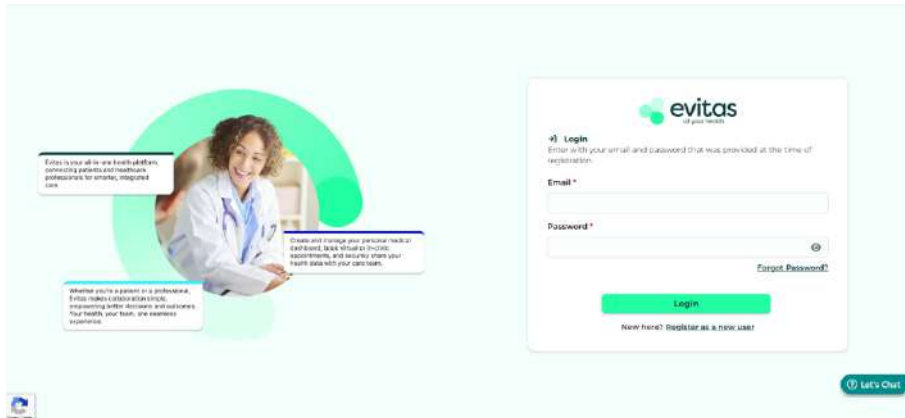
- You will receive a **Connection Request** email advising who has sent the request. If you want to connect with the Patient on Evitas, you will need to register on Evitas.
- Click on **Join**. This will take you to the **Registration** page of Evitas.



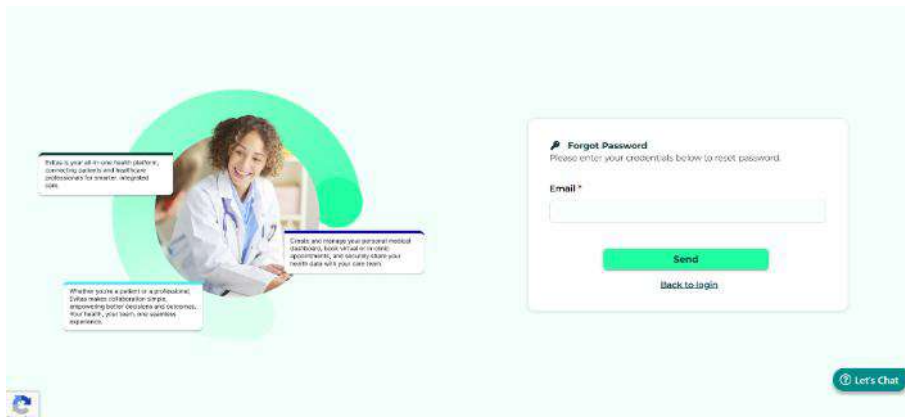
Complete the registration details by referring to the section above titled **Registering for Evitas**.

If for some reason, the patient has not found you on Evitas and you already have an account, you can click on **Already have an account?**

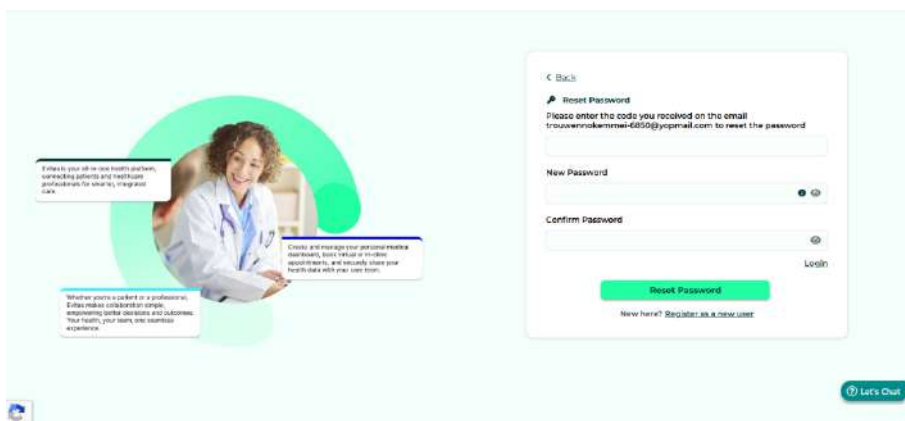
# Login to Evitas



- Login to Evitas using your email address and password that you registered with. If you have forgotten your password, click on **Forgot Password?**

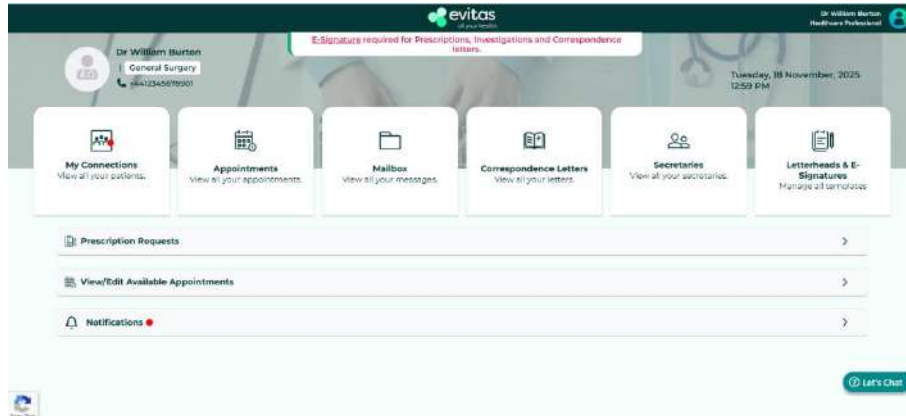


- Enter your email and click **Send**. You will be sent an email with a verification code. Enter the code and then create and confirm your new password.
- Click on **Reset Password**.



You will be taken back to the **Login** screen and asked to authenticate your account by checking your phone for the two-factor authentication code. After adding in your login information. You will then be taken to your **Dashboard**.

## My Dashboard



On your **Dashboard**, you will see:

- **My Connections**
- **Appointments**
- **Mailbox**
- **Correspondence Letters**
- **Secretaries**
- **Letterheads and E-signatures**

You can also view incoming **Prescription Requests**, **View/Edit Available Appointments** and **Notifications** on your home screen.

To use all the functionality of Evitas and enable you to interact with your patients you need to be connected to those patients through the platform.

## My Connections

Evitas enables you to connect with **Patients** who authorise/approve you to access their profile. Once approved you can have full visibility of their medical data and can upload referral letters, clinic notes, results and more.

This happens in one of two ways:

1. A **Patient** can invite you to connect and authorise you to have access to their data.
2. You can invite a **Patient** to Evitas.

There are three tabs on the **My Connections** page where you can:

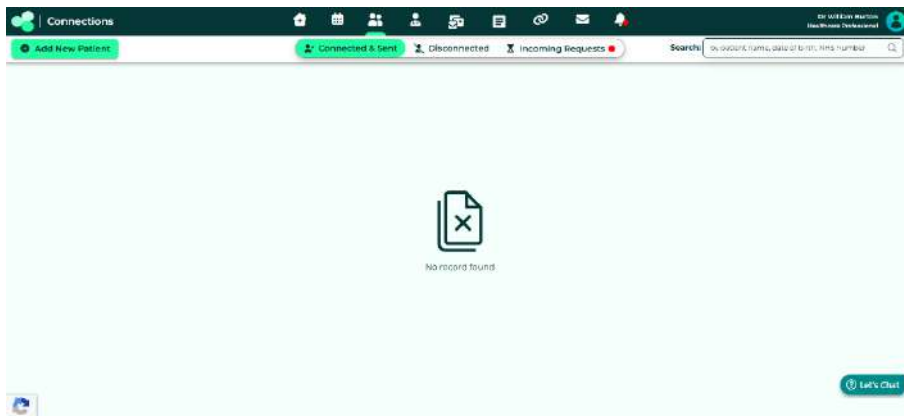
- View any **Patients** you are connected with.
- View any **Patients** that you are disconnected from.
- Any requests to connect that are in progress.

## Patient Inviting an HCP to Connect

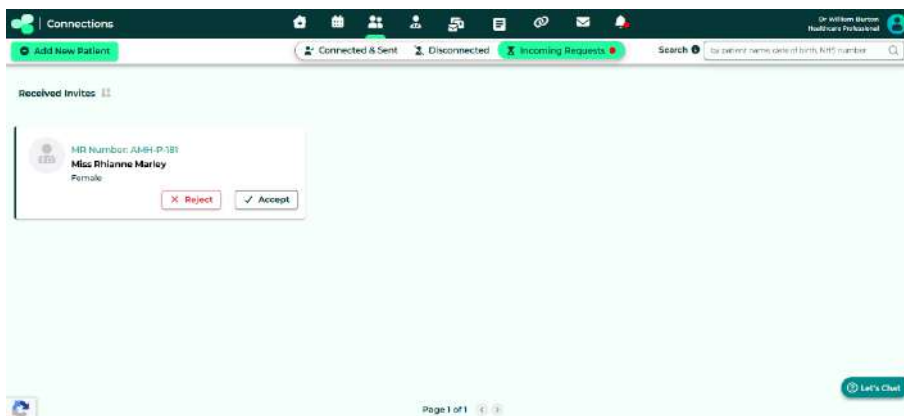
Any **Patient** registered on Evitas can invite an HCP involved in their care to **Connect**. If you are already registered with Evitas, the **Patient** will send you a **Connection Request**. If you are not registered with Evitas, the **Patient** can send you an **Invite to Register**.

Any invites to **Connect** can be seen in the **My Connections** section or **Notifications** section of your **Dashboard/Profile**. You will see a red dot indicating there is a new request or notification.

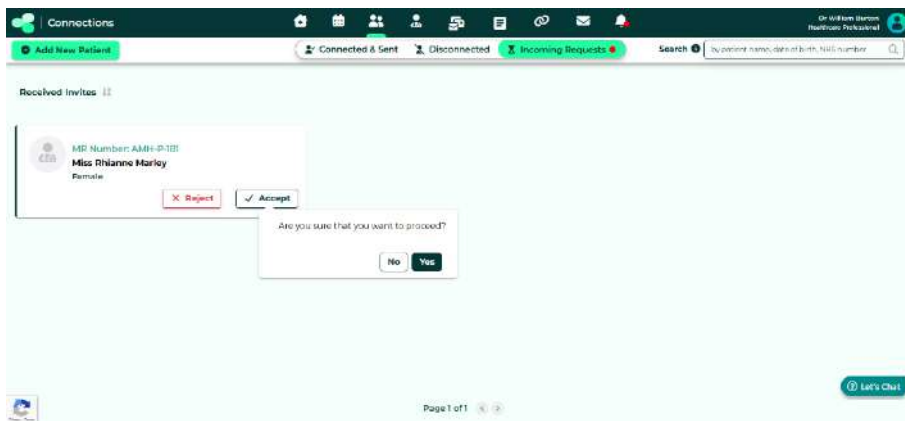
- Click on **My Connections**.



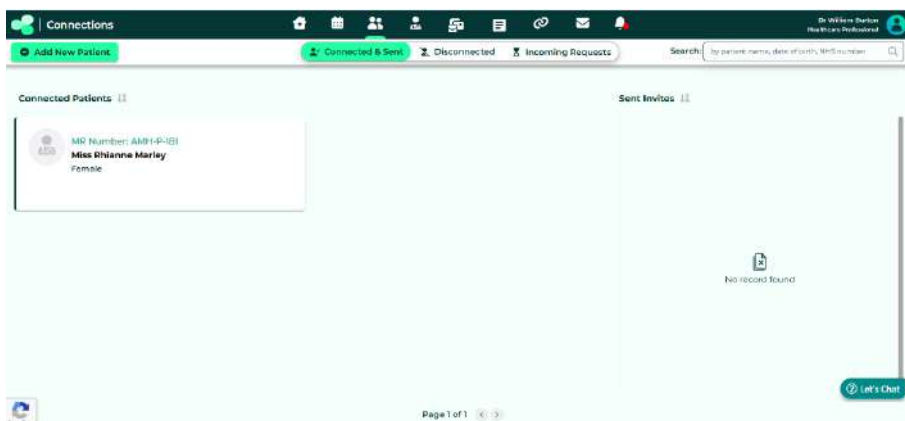
- Click on **Incoming Requests** to review a **Connection Request** from a **Patient**.



- Here you will see any invites. Click on either **Accept** or **Reject**, a pop-up will appear asking you to confirm if you would to proceed, confirm by either clicking **Yes** or **No**.



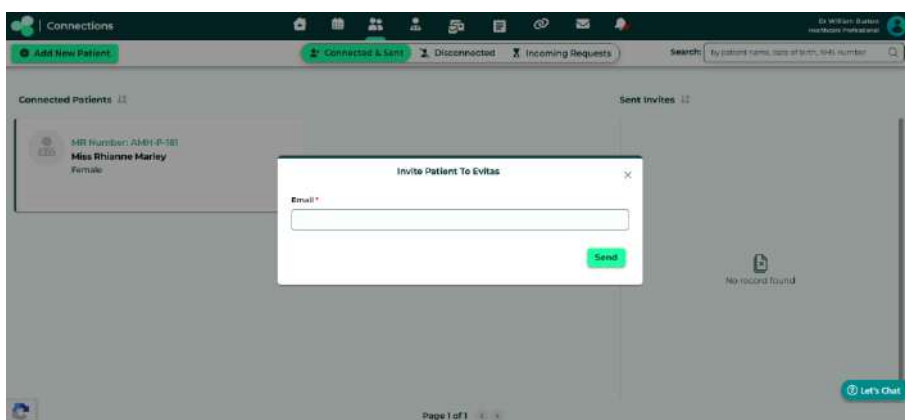
- If you now go to the **Connected** and **Sent** tab, you will see your **Connected Patient**.



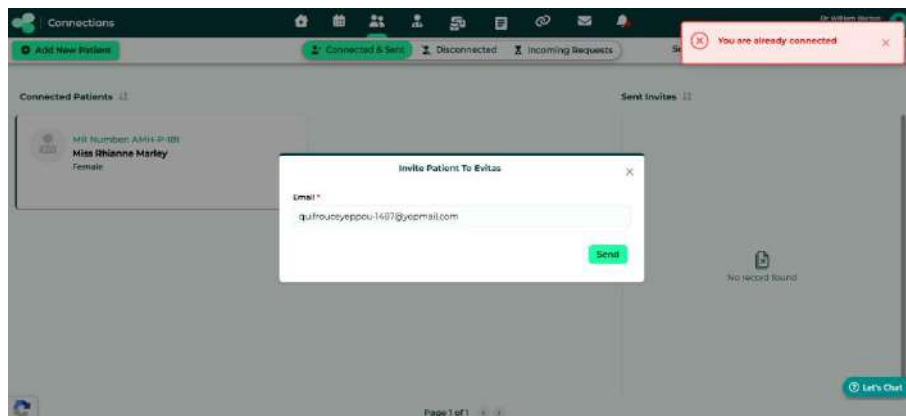
## HCP Inviting a Patient to Evitas

You have the option to **Connect with Patients** under your care who are not registered on Evitas by sending them an invite to join.

- Click on **Add New Patient**. Add the **Patient's** email address to the **Invite Patient to Evitas** field and click **Send**.



If you are already connected with the **Patient** and error message will appear stating 'You are already connected'.



The **Patient** is sent an email telling them that you want to **Connect** with them on Evitas. They are asked to click the **Join** button to register and accept the **Connection Request**. Once the **Patient** has registered and accepted your **Connection Invite**, they will be visible under the **Connected** tab. Any invites to **Connect** that have been sent and awaiting acceptance are visible under **Sent Invites**.

## Disconnecting

You can see any disconnected **Patients** under the **Disconnected** tab. You will be able to access their **Patient** record from the time they connected with you to the time they disconnect with you.

## Appointments

In this section, you can manage all your appointments and meetings with your patients. You will have visibility of both upcoming and previous appointments/meetings as well as a shortcut on the home screen to **View/Edit Available Appointments**. If a new meeting or appointment has been added you will see a red dot on the icon indicating this.

You will first need to set up your **Appointment** timings using the **View/Edit Available Appointments** tab.

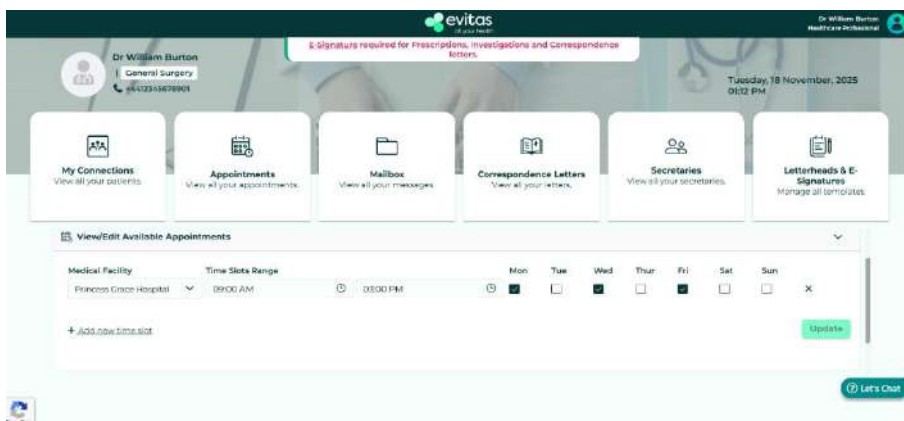
### View/Edit Available Appointments

You can select your **Appointment** timings by clicking on the **View/Edit Available Appointments** tab on your home screen. This will lead you to fill in the following:

- Medical Facility
- Time Slot Range
- Days of the Week

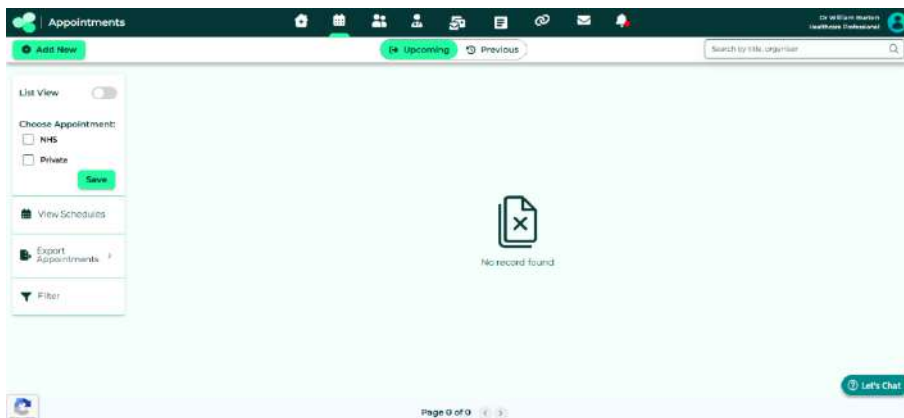


- From the drop-down menu in the **Medical Facility** tab, select the facility you want to make accessible for booking appointments.
- Set your **Time Slot Range** according to what timings you prefer for appointments/meetings. This will also allow patients to request appointment bookings during these hours.
- Select what days of the week you are accessible for appointments/meetings.
- Click **Update**.



You have now updated your preferred appointment slots. Bookings can now be requested during these timings. You can choose to add further time slots by clicking on the **(+) Add New Time Slot** button and repeating the same process.

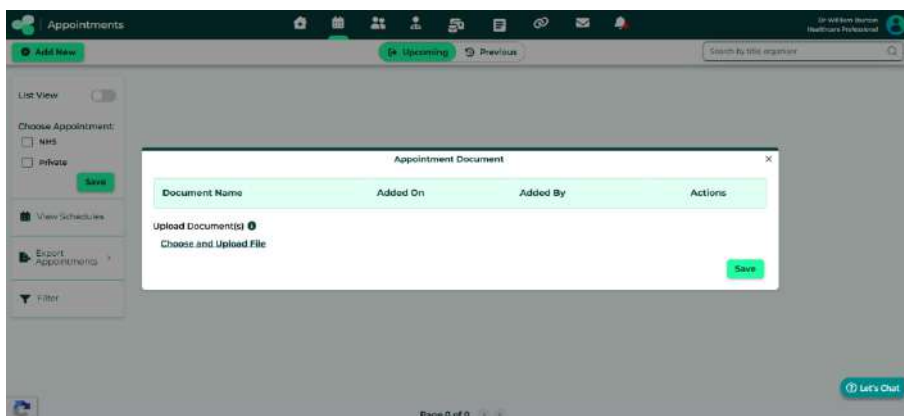
Now click on **Appointments** to view or schedule appointments.



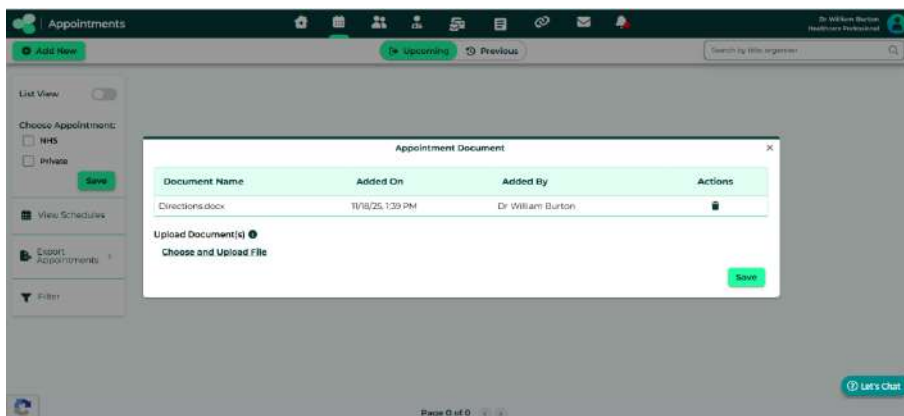
When sending an **Appointment Request** to a **Patient** there is an option to add **Appointment Documents**. Any documents added should be general administration documents for example: Directions to Clinic, Disclosure Forms, Feedback Questionnaires etc. It is important to note that documents containing any **Patient** details or clinical information should not be attached. These should be uploaded directly to the **Patient Dashboard**.

The administration documents can be added the **Appointment Documents** tab which is a document repository for selection when sending an **Appointment Request** to a **Patient**.

- Click on **(+) Add New** and select **Appointment Documents** from the drop-down menu.



- Click on **Choose and Upload File**. This will take you to your desktop where you can select any documents you wish to upload. Uploaded documents appear in the **Appointment Documents** tab showing the **Added On** date and **Added By**. If no longer required, documents can be deleted using the **Bin** icon.



## Upcoming Appointments

Any **Upcoming Appointments** will be displayed on the **Upcoming** tab as **List View** as the default. These appointments may be ones that have been requested by the **HCP**, their **Secretary** or by a **Connected Patient**.

Title	Patient Name	Patient Details	Date & Time	Status	Meeting (Link / Location)	Organised By
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	lsm2e0405@gmail.com +447958442210	16 Dec. 2025 09:45 PM - 10:30 PM	1 Pending	17 Meadowside Road, Pangbourne, Reading, Berkshire	You
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	lsm2e0405@gmail.com +447958442210	19 Dec. 2025 10:30 AM - 10:55 AM	1 Pending	17 Meadowside Road, Pangbourne, Reading, Berkshire	Miss Megan Elizabeth Murphy
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	lsm2e0405@gmail.com +447958442210	16 Dec. 2025 10:30 AM - 11:55 AM	1 Cancelled	24 Strangways Terrace, London, W14 8NF	Miss Megan Elizabeth Murphy
Appointment Request Virtual	Miss Megan Elizabeth Murphy	lsm2e0405@gmail.com +447958442210	16 Dec. 2025 09:00 AM - 09:25 AM	1 Rejected	Click links to start the meeting	Miss Megan Elizabeth Murphy
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	lsm2e0405@gmail.com +447958442210	19 Dec. 2025 10:30 PM - 12:50 PM	1 Pending	17 Meadowside Road, Pangbourne, Reading, Berkshire	Miss Megan Elizabeth Murphy
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	lsm2e0405@gmail.com +447958442210	19 Dec. 2025 11:30 AM - 11:50 PM	1 Rejected	17 Meadowside Road, Pangbourne, Reading, Berkshire	Miss Megan Elizabeth Murphy
New Patient Appointment Virtual	Miss Megan Elizabeth Murphy	lsm2e0405@gmail.com +447958442210	26 Dec. 2025 08:00 AM - 09:00 AM	1 Rejected	Click links to start the meeting	You

If you click on the arrow on the right hand side of an appointment record you can see the specific **Appointment Details**.

**Appointment Details**

Miss Megan Elizabeth Murphy invited you  
Appointment Request

Consultation Reason:  
Requesting an appointment for medical attention or consultation.

Appointment Details: **Cancelled**

- Date: 17 Dec. 2025
- Time: 10:30 AM to 10:55 AM

Pending (1)

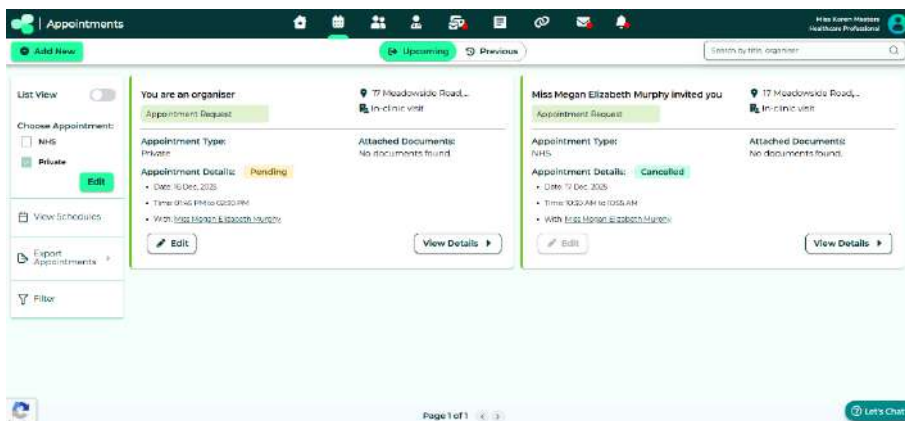
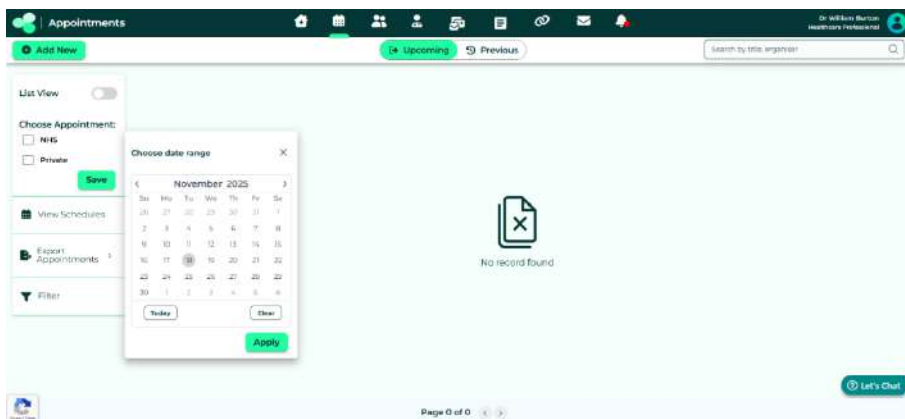
Miss Karen Masters (HCP)

You have options on how you want to view **Upcoming Appointments**.

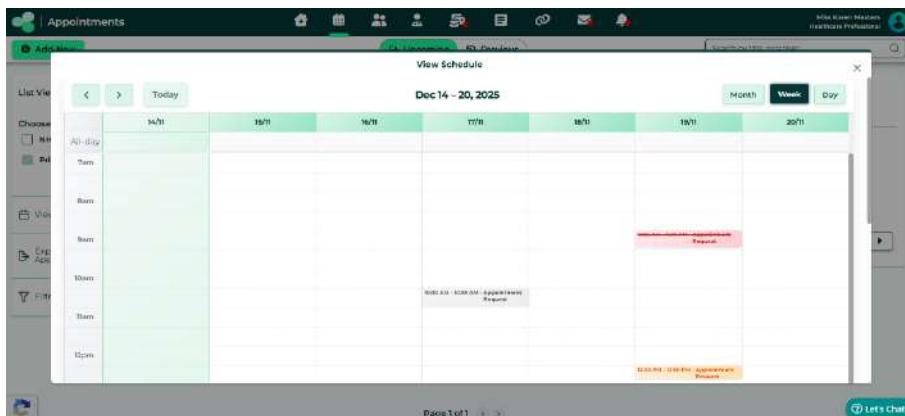
- Click the **List View** option button to turn off. You will then see all **Upcoming Appointments** as appointment cards.

Appointment Type	Status	Appointment Details
You are an organiser Appointment Request In-clinic visit	Pending	Date: 16 Dec. 2025 Time: 09:45 PM to 10:30 PM With: Miss Megan Elizabeth Murphy
Miss Megan Elizabeth Murphy invited you Appointment Request In-clinic visit	Cancelled	Date: 16 Dec. 2025
Miss Megan Elizabeth Murphy invited you Appointment Request In-clinic visit	Pending	Date: 19 Dec. 2025 Time: 10:30 AM to 10:55 AM With: Miss Megan Elizabeth Murphy
Miss Megan Elizabeth Murphy invited you Appointment Request In-clinic visit	Rejected	Date: 16 Dec. 2025

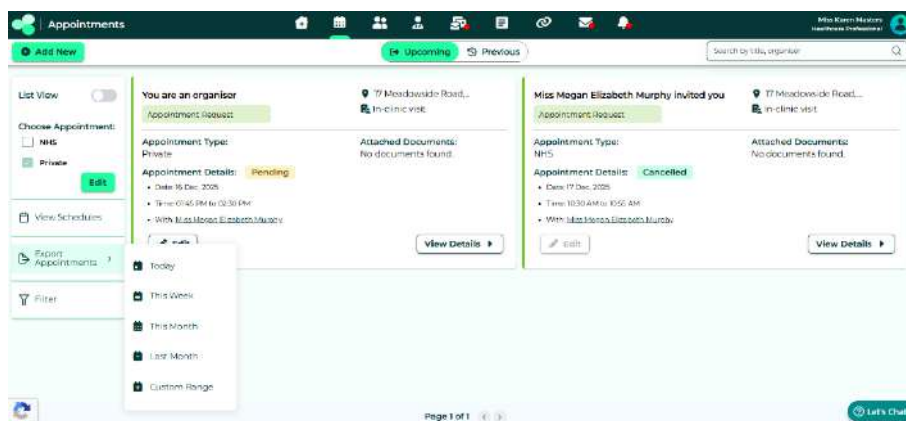
- In either **List View** or **Appointment Card View** you have the option to filter over a date range.



- Alternatively, click on **View Schedule** which will display a calendar view where you can select a specific **Day**, **Week** or **Month**.



- Appointments can also be exported to an Excel spreadsheet. Click on **Export Appointments** and select a date range. An Excel spreadsheet will be download to your device.



For any appointment requested by a **Patient** or created by you (or your secretary) you will see details including the reason for the **Appointment**, **Appointment Type** (NHS or Private) the **Date**, **Time**, **Patient Name**, and **Location**.

There is a hyperlink to the **Patient's Dashboard** by clicking on the **Patient Name**. Appointments may be **Accepted** or **Pending** or **Rejected** either by the **Patient** if the Appointment has been sent by the HCP/Secretary or by the HCP if the Appointment has been sent by the **Patient**.

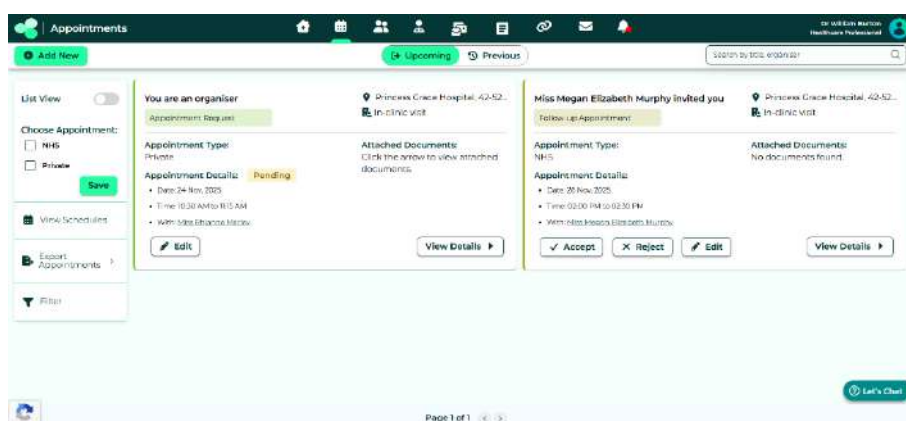
The **Appointment Request** shows who has sent the request. If the **HCP** is the organiser it will state 'You are the organiser', if the **Patient** has sent the request it will state 'Patient name is the organiser'.

You also have options to **Edit** or **Cancel** appointments.

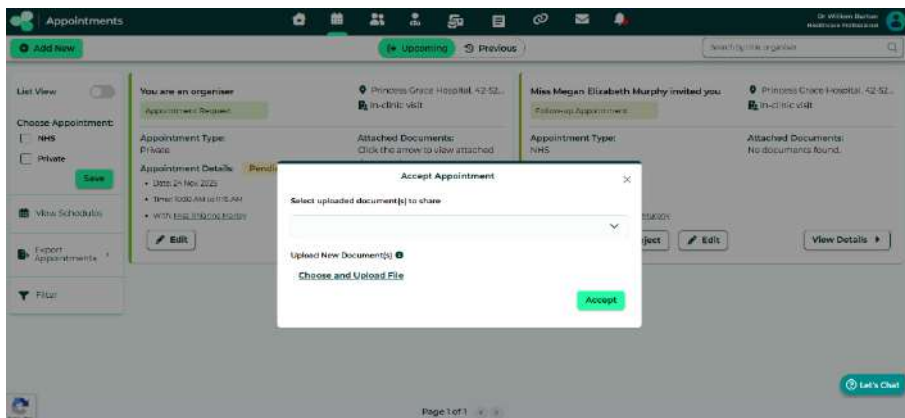
## Appointment Request from a Connected Patient

A new **Appointment Request** from a **Connected Patient** will be visible on the **Upcoming** tab on your dashboard. You have filter options including viewing as Appointment Cards, a List View, Calendar view and the ability to filter over a date range.

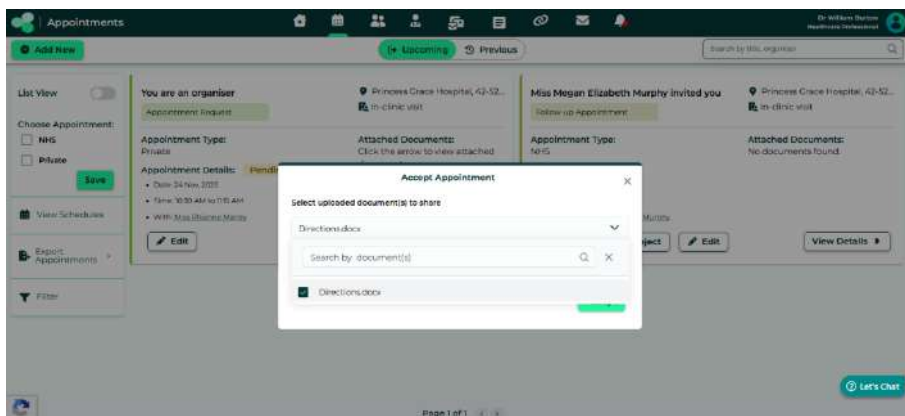
A new appointment request from a **Connected Patient** will give you or your secretary the option to **Accept**, **Reject** or **Edit**.



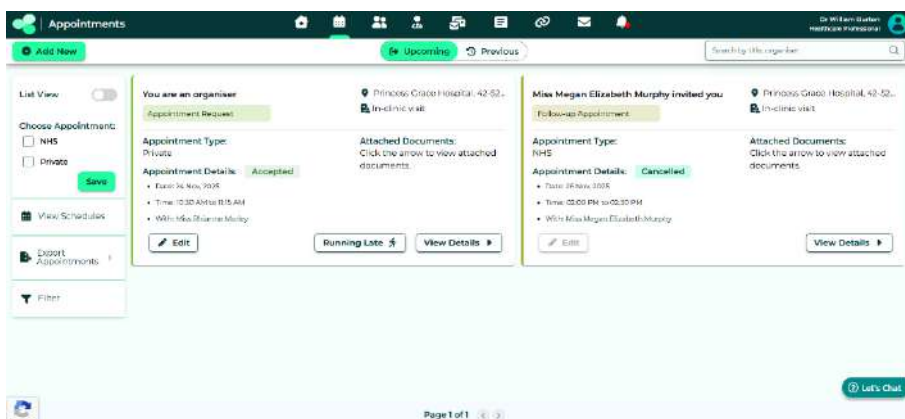
- To accept the Appointment request click on **Accept**. A pop-up will appear with an option to select any documents you wish to upload, for example directions or questionnaires. Any documents to upload must be in the **Appointment Documents** repository.



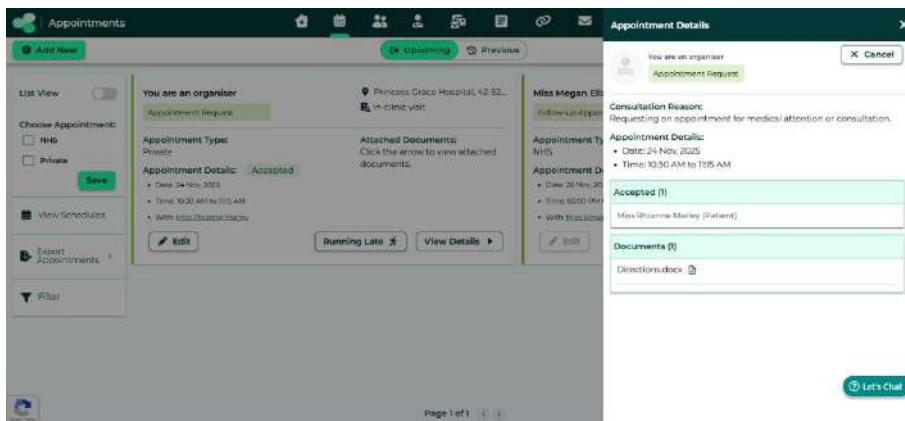
- Click on the arrow to reveal a drop-down of documents available for selection.



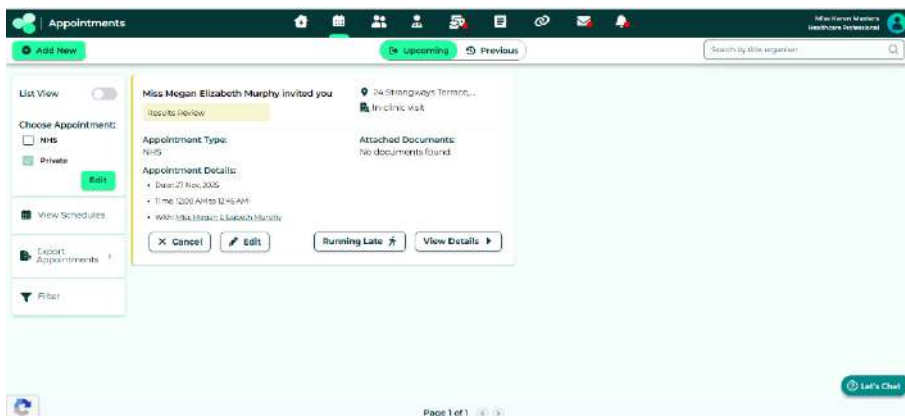
- Check the box(es) for the documents to attach. The document filenames are visible in the field. Once uploaded click **Accept**. The **Appointment** is now visible on the **Upcoming** screen as **Accepted**.



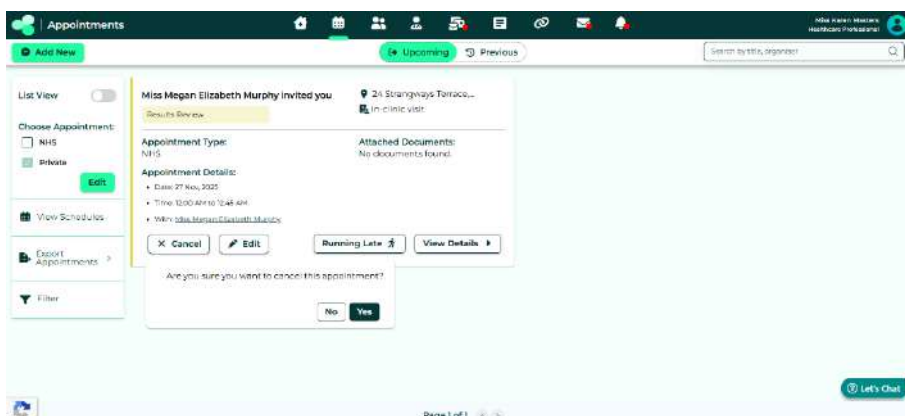
- To view the **Appointment**, click on **View Details** button. A pop-up appears showing the **Appointment Title, Description, Time, Date, Organiser** and **Attached Documents**. Clicking on the PDF icon enables you to view the **Attached Document(s)**.



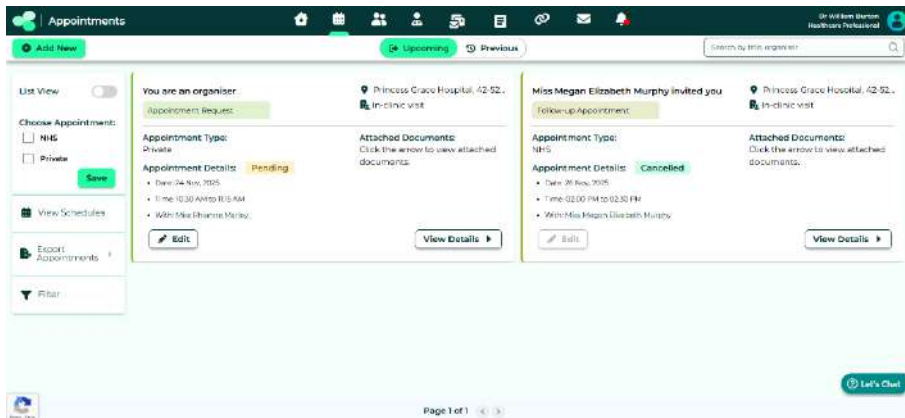
- Once **Accepted**, the **Patient** will be sent notifications by email and SMS along with an in-EVITAS notification.
- Once an **Appointment** has been accepted you have three options available to you – **Cancel**, **Edit** and **Running Late**.



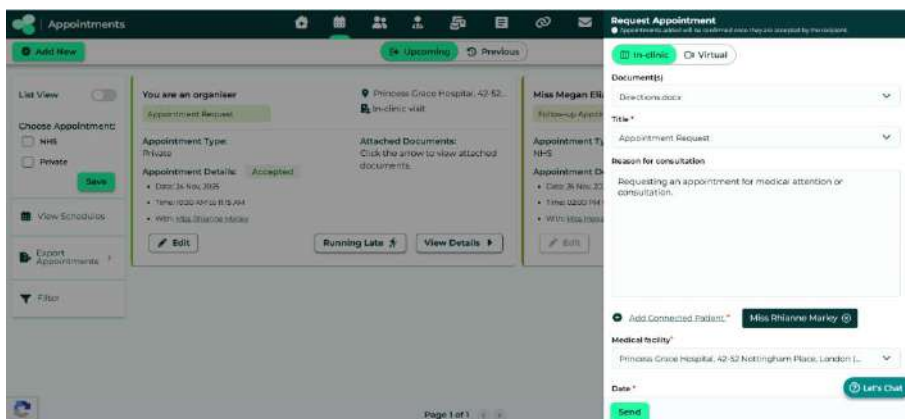
- If you want to **Cancel** the **Appointment Request** click **Cancel**. A pop up appears asking you 'Are you sure you want to cancel this appointment?'. Click **Yes**.



The appointment will be shown as **Cancelled** on your dashboard. The patient will receive an email and a text message stating that the appointment has been cancelled and to contact the office to reschedule.



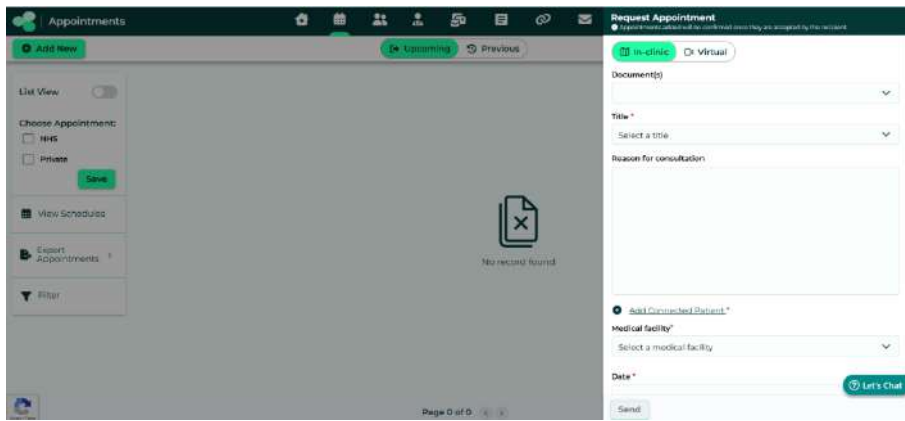
- If the **Accepted Appointment Request** needs to be changed click on **Edit** and the appointment details pop-up will appear.



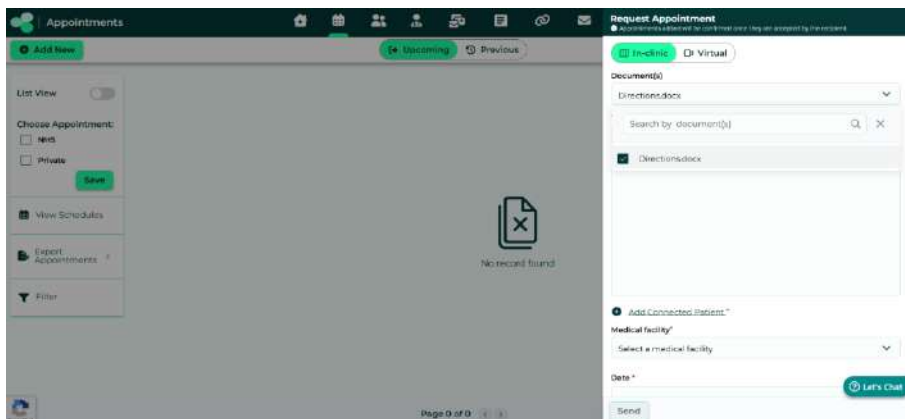
- Change relevant details and click **Send**.
- The **Appointment** will be shown on your dashboard with the status changed to **Pending** as the patient will need **Accept/Reject** the updated **Appointment Request**.
- The patient will receive an email and SMS long with an in-EVITAS notification stating that the appointment has been changed and to login to their dashboard to **Accept/Reject**.

## HCP Adding a New Appointment or Meeting

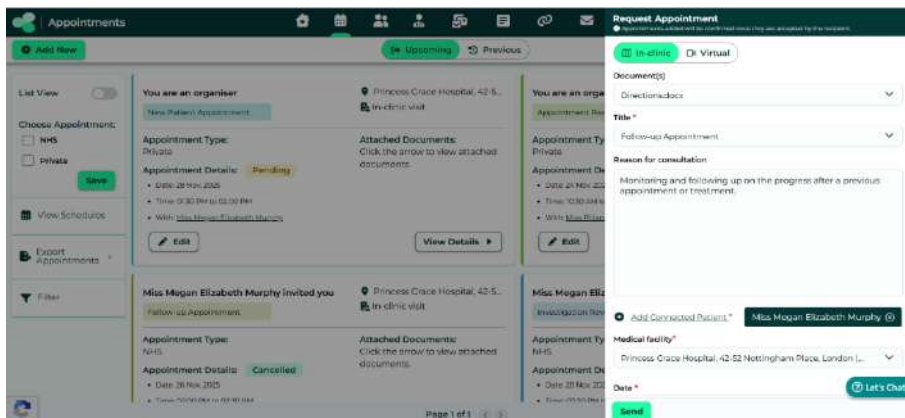
- To add a new appointment or meeting, click on **(+) Add New Appointment**.



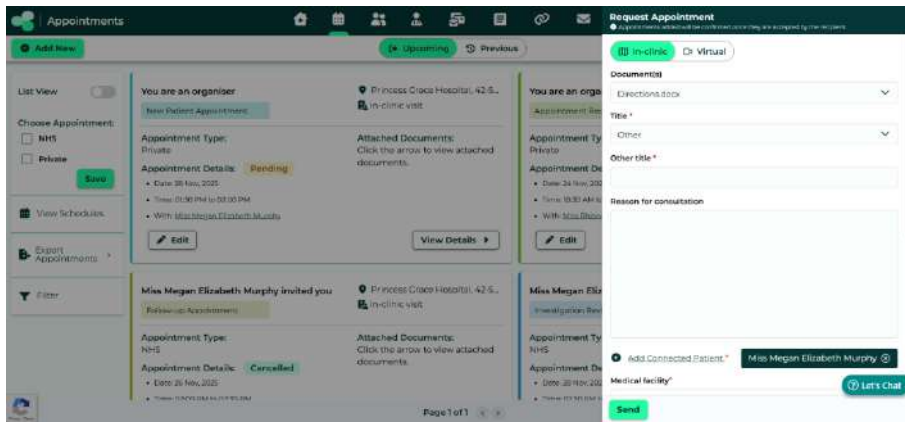
- Select whether it is a **Virtual** or **In-clinic** appointment.
- If you want to attach administration documents from the **Appointment Documents** repository, click the documents drop-down arrow and select the relevant documents



- Add in an **Appointment Title** by clicking the drop-down arrow and selecting from the options available. The **Reason for Consultation** field autopopulates with basic text but this is a free text box and can be edited.

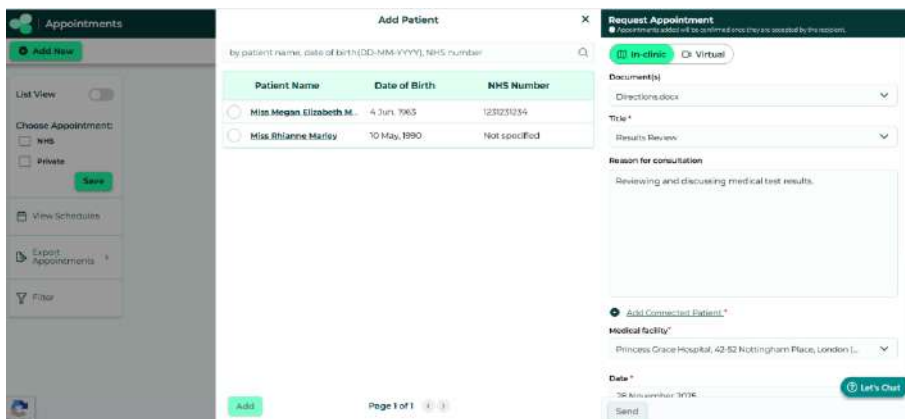


- If there is no relevant **Appointment Title** the option of **Other** can be selected. A mandatory free text box **Reason for Consultation** appears which can be populated with relevant text.



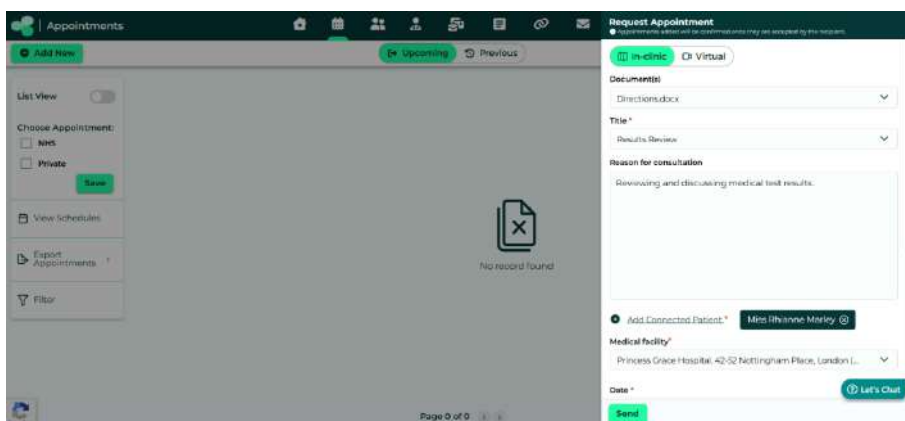
You then have an option to add a **Connected Patient** and any additional **Healthcare Professional(s)** (if a Virtual Appointment/Meeting).

- To add a **Connected Patient**, click on **Add Connected Patient**. You will then see a list of all the **Patients** you are connected with.

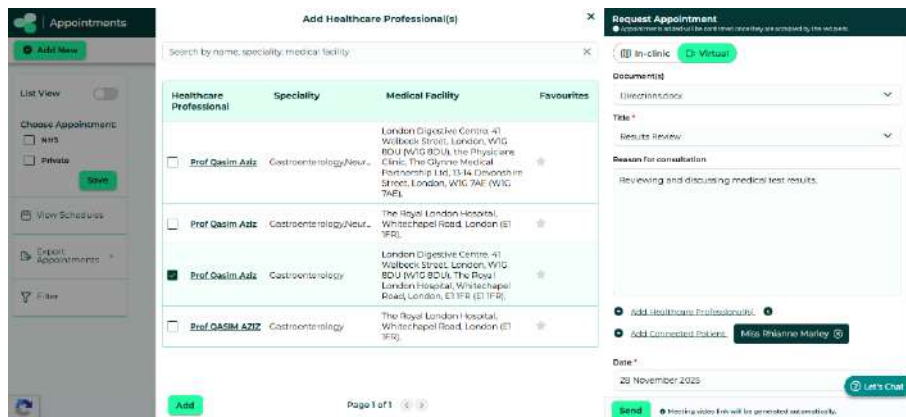


- Select the **Patient** you want to invite to the meeting/appointment.
- Click **Add**.

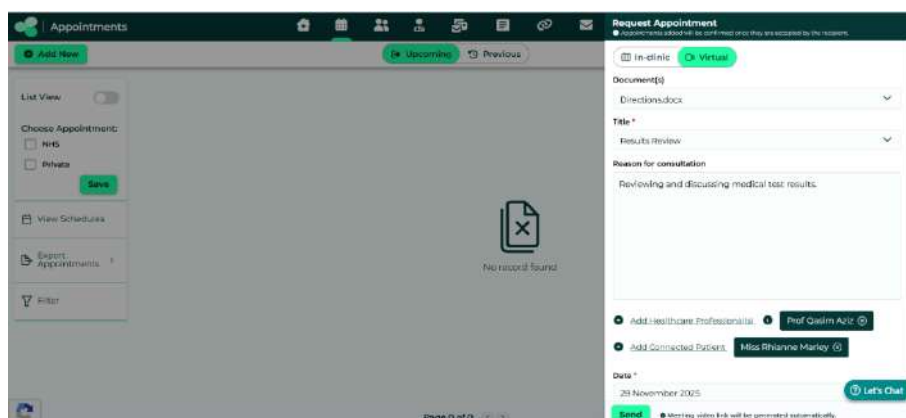
You will now see the **Patient's** name added to the appointment.



- If the **Appointment** is a **Virtual Appointment** and you wish to add Healthcare Professionals, click on **Add Healthcare Professional**. A pop-up will appear showing all **Healthcare Professionals** registered on Evitas that have been marked as a favourite by you or your secretary registered on Evitas. If they HCP is not visible you can search by name, specialty or medical facility. Select the relevant **Healthcare Professional**. Currently you can only add Healthcare Professionals that are on Evitas, further development will enable you to invite others not on Evitas.



- The **Healthcare Professional's** name appears.

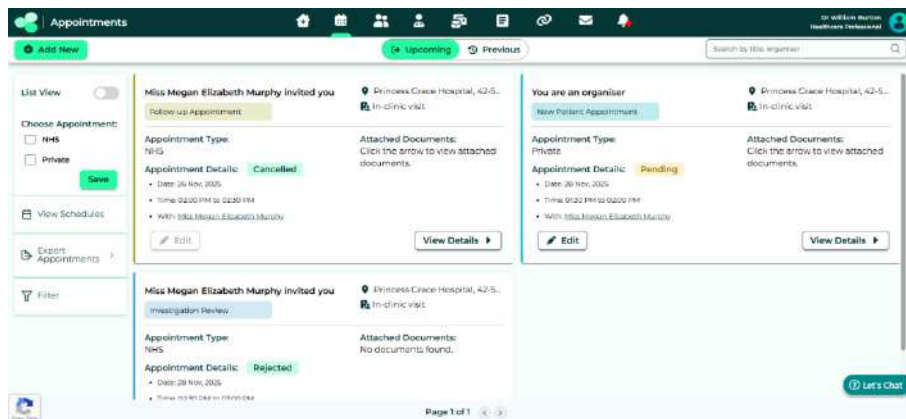


- If the **Appointment** is an **In-clinic** appointment, select the **Medical Facility** at which the appointment will take place.
- Complete the **Date**, **Start Time**, and **Duration** of Appointment. The **End Time** will automatically populate. If the day and time of appointment falls outside your pre-set clinic times an error message will appear.
- You can now send the appointment/meeting invite by clicking **Send**. The invite and meeting video link (if required will be sent) will be sent to invited **Patients** and **HCPs**.

The **Patient** will be sent notifications of your **Appointment Request** by email and SMS along with an in-EVITAS notification.

Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress.

On your **Appointments** screen, you will see the new appointment you have created. It shows you as the organiser and details on the status of invited participants (**Accepted, Rejected, Pending, Cancelled**). Also included are details of the meeting such as **Title, Date, Time, Location** and **Virtual Meeting** link (if required).



If using Evitas and another system for appointment management, it is important to ensure that any appointment requested and then accepted must be recorded identically in both systems.

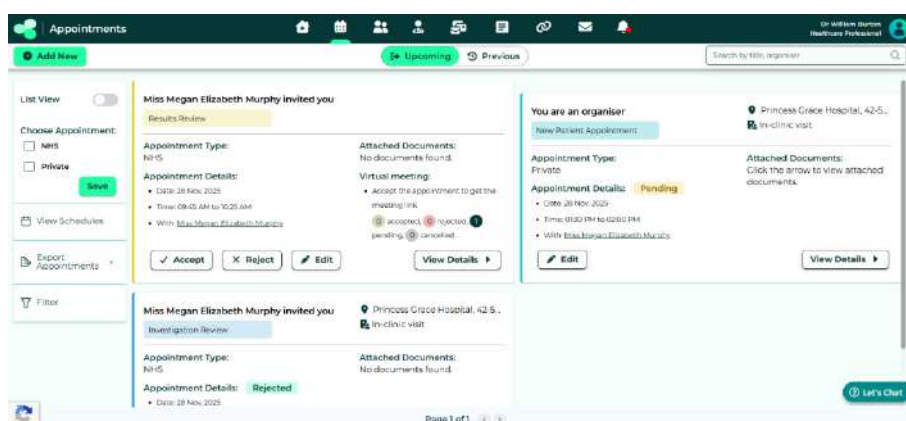
When an invited participant changes the status of their invite, for example when they accept the request, you will receive an email and In-Evitas notification. For further details on the appointment, you can click on **View Details**.

### Accepting/Editing/Canceling an Appointment

Appointments either created by you (and your team) or requested by a **Patient** can be **Accepted, Edited, Rejected** or **Cancelled**.

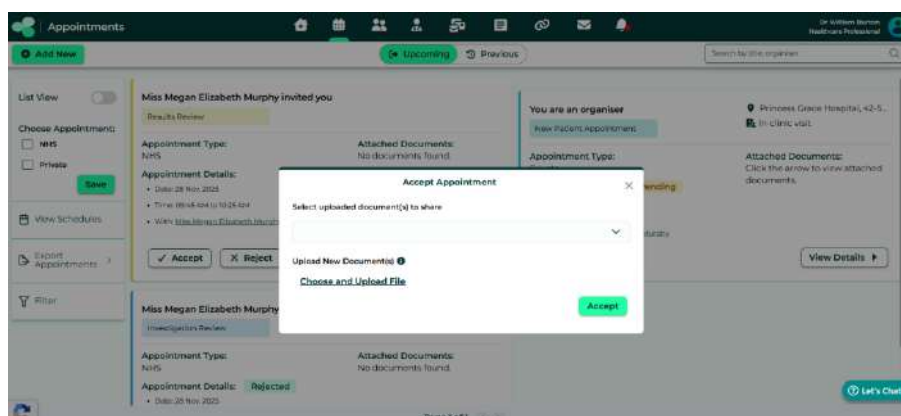
### Patient Requested Appointment

If a **Patient** has sent an **Appointment Request** this will be visible on your **Appointments** screen under the **Upcoming** Tab.

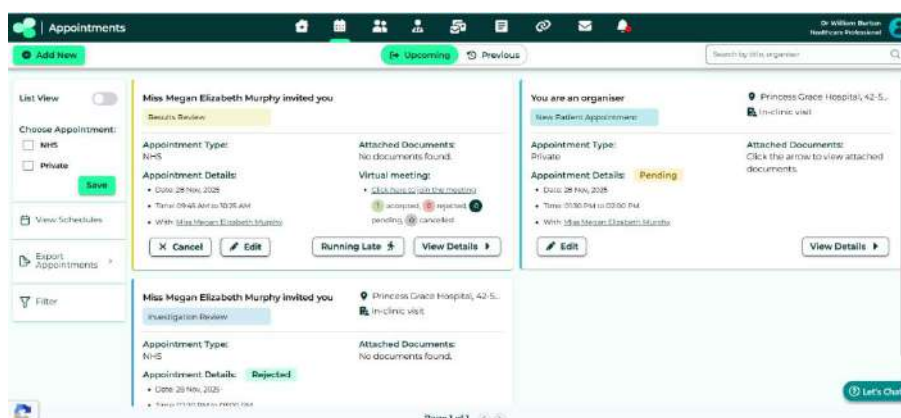


You have the option to **Accept, Reject** or **Edit** the **Appointment**.

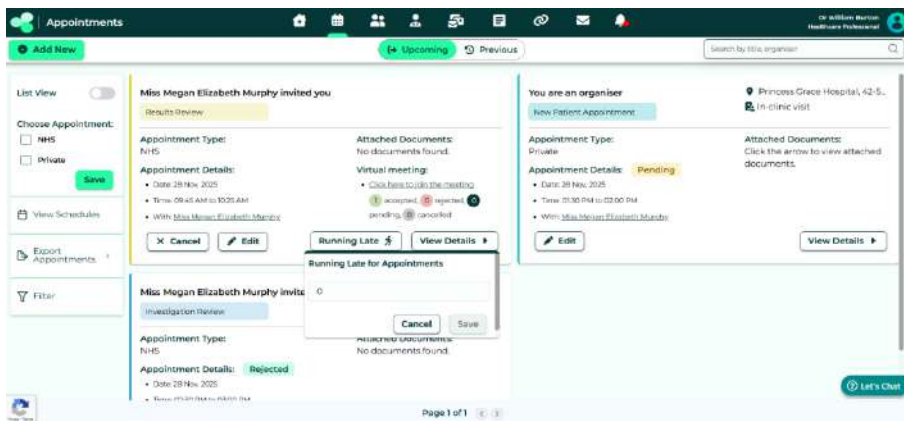
- Click on **Accept**, an Accept Appointment pop-up appears with the option to upload any documents you wish to share with patient e.g., directions, questionnaires etc. You can select documents from your document repository or you can upload a new document.



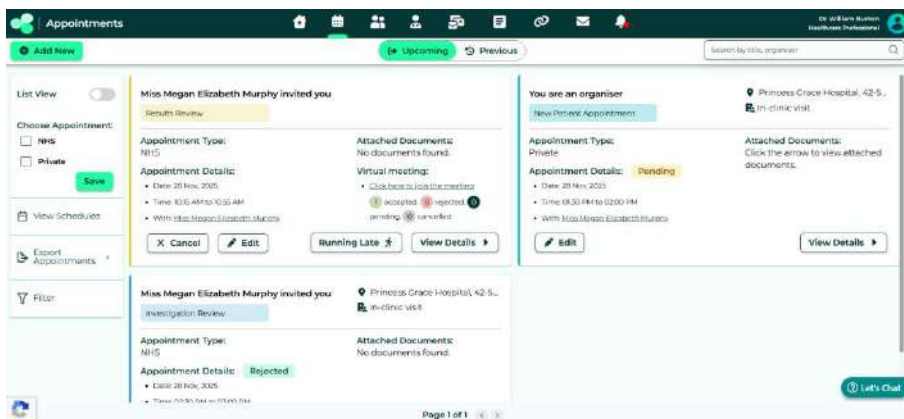
- Once **Accepted** the **Patient** will be sent an email, SMS and in-Evitas notification to say that the **Appointment** has been **Accepted**.
- The **Appointment** is now shown as **Accepted** on your **Upcoming Appointments** tab.



- If you need to change the **Appointment** for any reason you can **Cancel** or **Edit** it. The **Patient** will be sent an email, SMS and in-Evitas notification advising of a change of status. For an **Appointment** that has been edited, the status will revert to **Pending** and the **Patient** will need to **Accept** the **Appointment** again. For a **Cancelled Appointment** the Patient notifications will ask them to contact you.
- On the occasions that you may be running late with your appointments you have an option to advise the patient of this. Click on **Running Late**.



- Add the number of minutes that you are running late and click **Save**.



- The time of the **Appointment** is automatically changed and the **Patient** sent an email, SMS and in-Evitass notification.

## HCP Requested Appointment

For any appointment requested by you (or your team) you have the option to **Edit** or **Cancel** at any time.

## Previous Appointments

- To view all previous appointments, click on **Previous**, this will open a screen showing you a list of all previous appointments. You can also search an appointment by typing in the title or the organiser's name by using the search bar on the right-hand side.

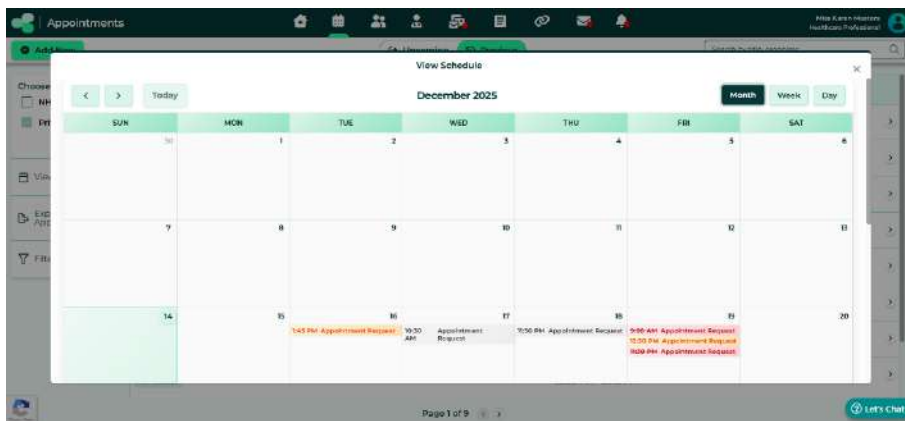
Title	Patient Name	Patient Details	Date & Time	Status	Organised By
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	12 Dec, 2025 12:00 PM - 12:40 PM	1 Pending	You
Appointment Request Virtual	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	12 Dec, 2025 11:30 AM - 12:00 PM	2 Pending	You
Appointment Request Virtual	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	12 Dec, 2025 10:20 AM - 10:25 AM	1 Pending	You
Appointment Request In-clinic	Not specified	Not specified	11 Dec, 2025 12:00 PM - 01:00 PM	1 Accepted	Miss Megan Elizabeth Murphy
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	11 Dec, 2025 11:00 AM - 11:20 AM	1 Pending	You
Appointment Request In-clinic	Not specified	Not specified	4 Dec, 2025 05:00 PM - 05:15 PM	1 Accepted	Miss Megan Elizabeth Murphy
Results Review In-clinic	Not specified	Not specified	27 Nov, 2025 12:00 AM - 12:45 AM	1 Cancelled	Miss Megan Elizabeth Murphy
Follow-up Appointment In-clinic	Not specified	Not specified	20 Nov, 2025 02:30 PM - 03:15 PM	1 Pending	Miss Rhianne Marley

You also have options to filter the **Appointments** by using the **Filter** option or the **View Schedule** option. The **Filter** option enables you to select a date range. Click refresh to clear all filters.

Title	Patient Name	Patient Details	Date & Time	Status	Organised By
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	12 Dec, 2025 12:00 PM - 12:40 PM	1 Pending	You
Appointment Request Virtual	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	12 Dec, 2025 11:30 AM - 12:00 PM	2 Pending	You
Appointment Request Virtual	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	12 Dec, 2025 10:20 AM - 10:25 AM	1 Pending	You
Appointment Request In-clinic	Not specified	Not specified	11 Dec, 2025 12:00 PM - 01:00 PM	1 Accepted	Miss Megan Elizabeth Murphy
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	11 Dec, 2025 11:00 AM - 11:20 AM	1 Pending	You
Appointment Request In-clinic	Not specified	Not specified	4 Dec, 2025 05:00 PM - 05:15 PM	1 Accepted	Miss Megan Elizabeth Murphy
Results Review In-clinic	Not specified	Not specified	27 Nov, 2025 12:00 AM - 12:45 AM	1 Cancelled	Miss Megan Elizabeth Murphy
Follow-up Appointment In-clinic	Not specified	Not specified	20 Nov, 2025 02:30 PM - 03:15 PM	1 Pending	Miss Rhianne Marley

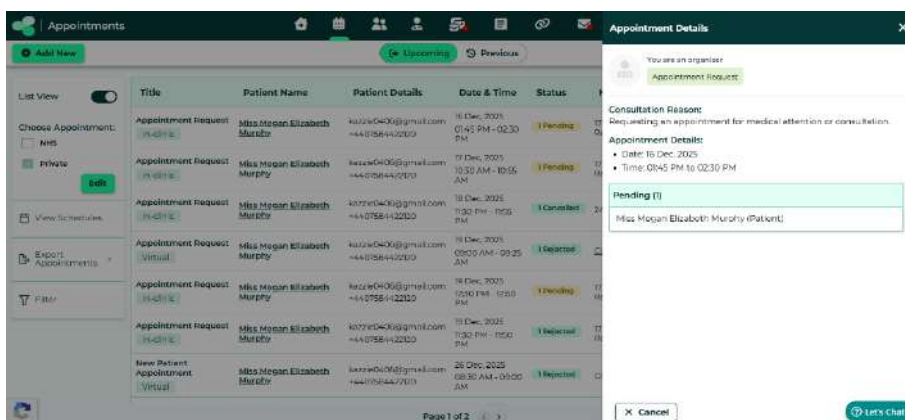
Title	Patient Name	Patient Details	Date & Time	Status	Organised By
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	12 Dec, 2025 12:00 PM - 12:40 PM	1 Pending	You
Appointment Request Virtual	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	12 Dec, 2025 11:30 AM - 12:00 PM	2 Pending	You
Appointment Request Virtual	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	12 Dec, 2025 10:20 AM - 10:25 AM	1 Pending	You
Appointment Request In-clinic	Not specified	Not specified	11 Dec, 2025 12:00 PM - 01:00 PM	1 Accepted	Miss Megan Elizabeth Murphy
Appointment Request In-clinic	Miss Megan Elizabeth Murphy	kazzie0406@gmail.com +440759442210	11 Dec, 2025 11:00 AM - 11:20 AM	1 Pending	You

The **View Schedule** option is a calendar view where you can select a specific day, week or month view.



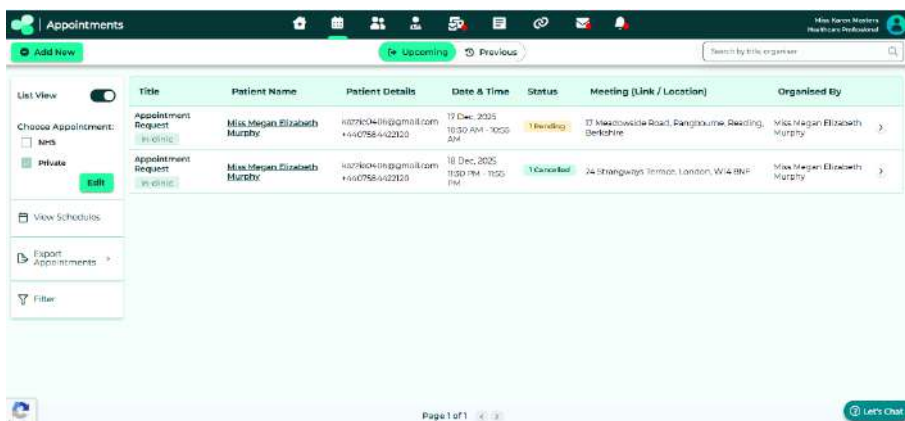
## Canceling Appointments

You can choose to cancel appointments that have been sent by you (or your team) regardless of their status (Pending or Accepted) in either List View or Appointment Card view.



- Click on **Cancel**, this will prompt you to confirm if you want to proceed.
- Click Yes.

You will now see that your appointment's status is updated to **Cancelled**.

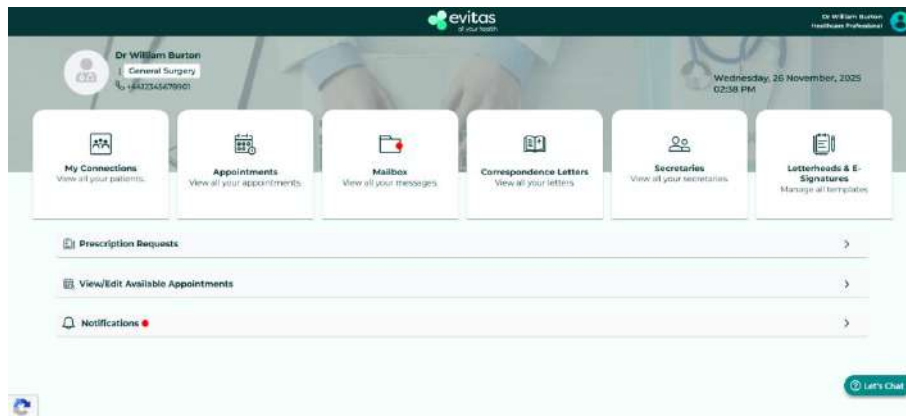


The **Patient** will be sent notifications by email and SMS along with an in-EVITAS notification.

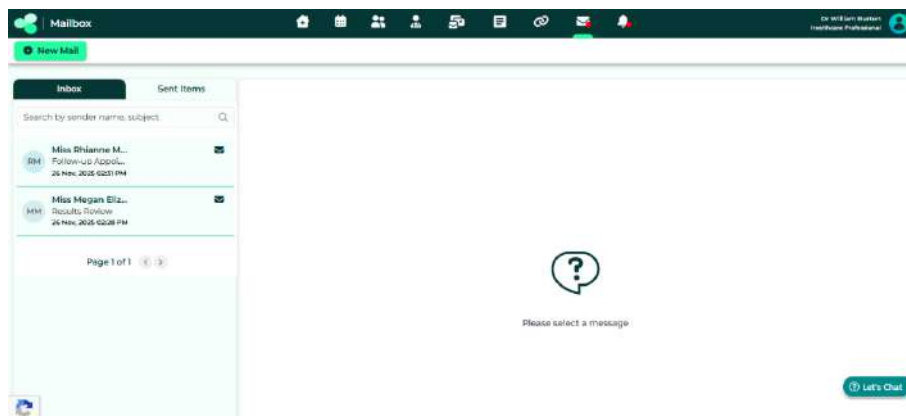
**Patients** can also **Cancel** an **Appointment** that they have previously accepted. The **Appointment** status will be updated on your **Appointment** screen and you will receive an In-Evitas notification.

## Mailbox

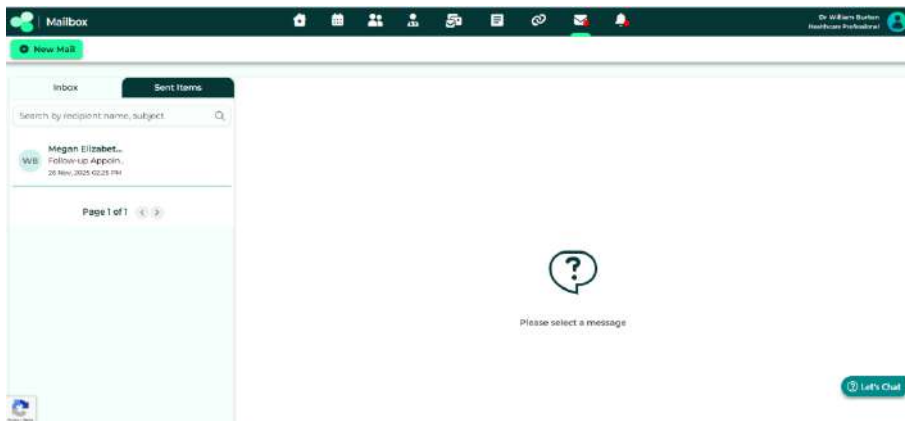
You have a dedicated **Mailbox** in Evitas where you can communicate with **Patients**, **HCPs** and **Secretaries** that are registered on Evitas. You also copy in other recipients who are not on Evitas using the CC field. Also, requests for appointments or connections will appear in this **Mailbox** as well as in **Notifications**. Any new mail will be indicated by a red dot.



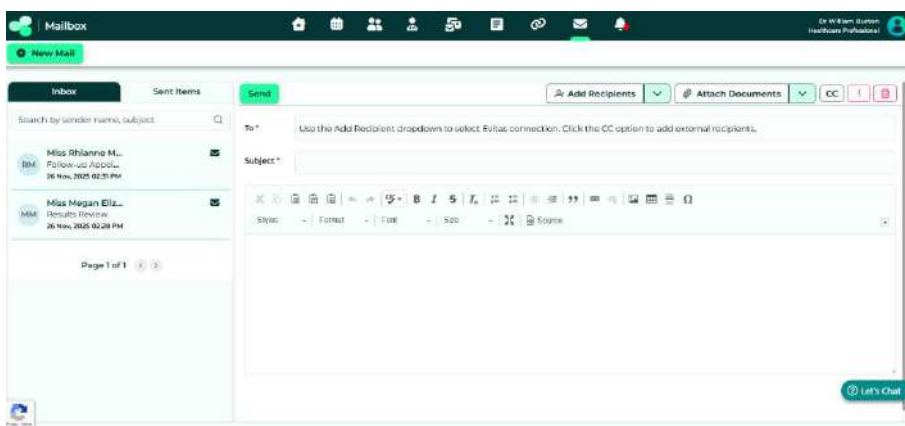
- Click on **Mailbox**.
- In your **Mailbox**, you will see any emails that you have received, click on **Inbox** to see all emails. Emails that are unread appear bold and have a closed envelope icon. The envelope icon appears open when an email has been read.



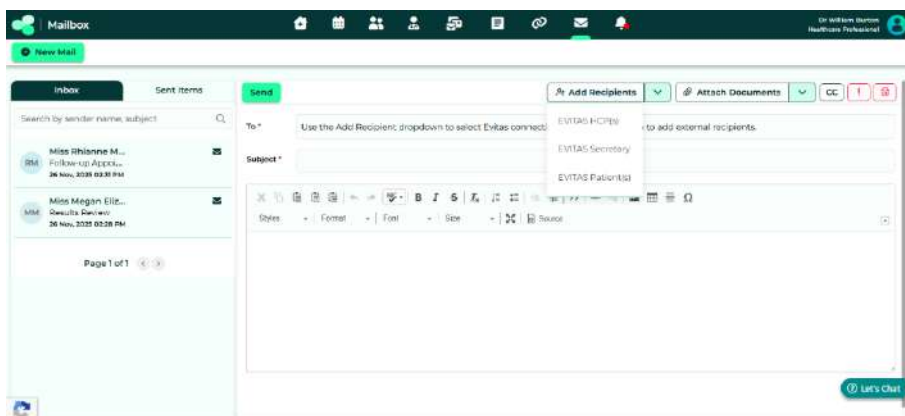
- Click on **Sent Items** to see any sent emails.



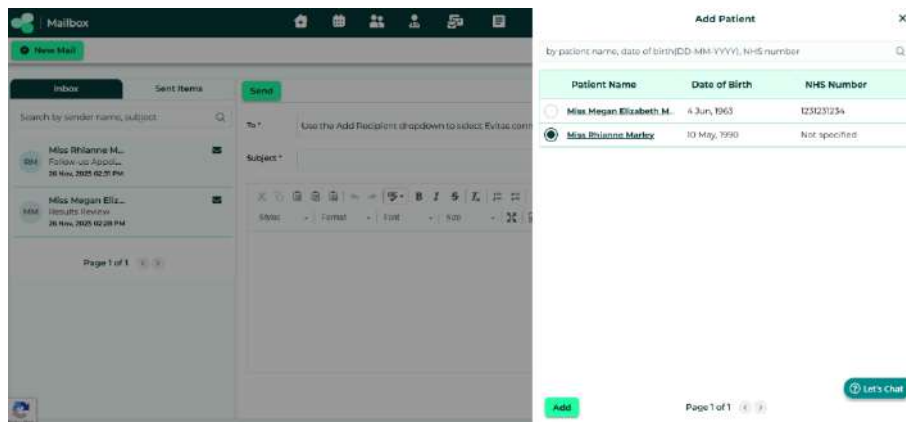
- If you want to send an email, click on **(+) New Mail**. You can send an email to any **HCPs** registered on Evitas, any **Patients** you are connected with, HCPs and secretaries external to Evitas.



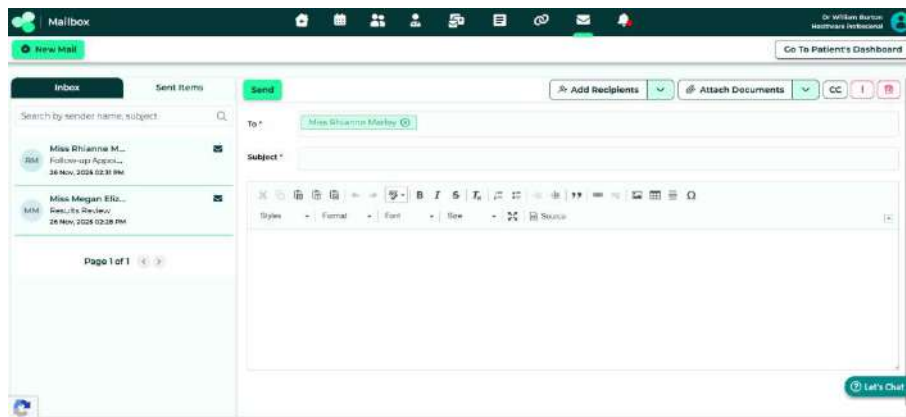
- To add a recipient in the **To** field, click **Add Recipients**. A drop-down menu appears with the option to select **Evita HCPs**, **Evitas Secretary** and **Evitas Patient**.



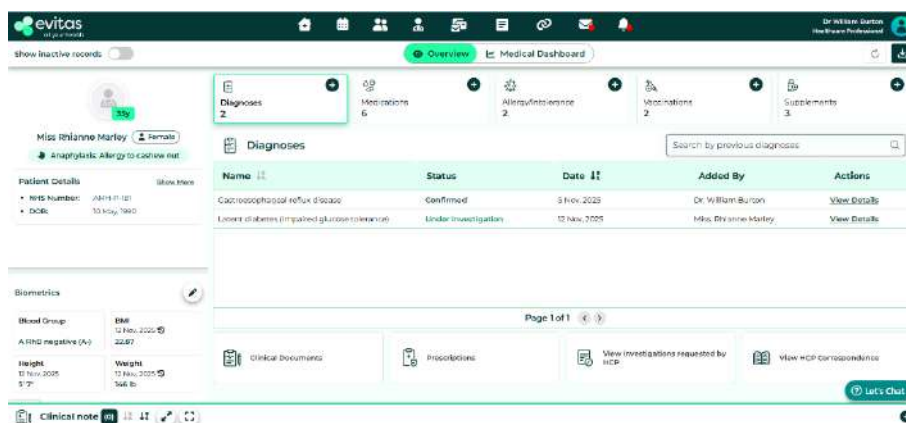
- To add a **Connected Patient**, click on **Evitas Patient** and select the relevant **Patient**. The system is designed to only allow you to select one patient.



- Click **Add**. The **Connected Patient's** name appears in the **To** field.

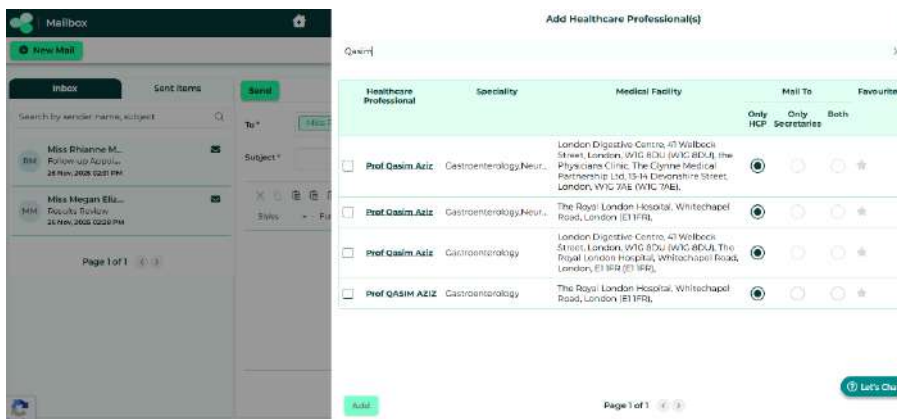


- An option is now visible allowing you to access the **Connected Patient's Dashboard**. Click on **Go to Patient's Dashboard**.

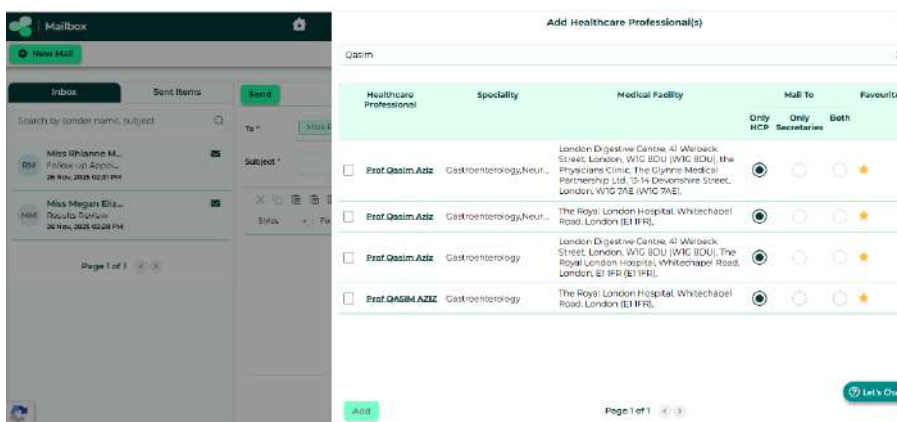


- To return to the email, click on **Mailbox** and **(+) New Mail**, the email you were composing will still be visible.
- To add additional **Evitas Healthcare Professional(s)** or **Secretary** click **Add Recipient** and select either **Evitas HCPs** or **Evitas Secretary**. An **Add Healthcare Professional(s)** box appears, if you have HCPs that been marked as a favourite they will be listed or you have the option to search for an **Evitas**

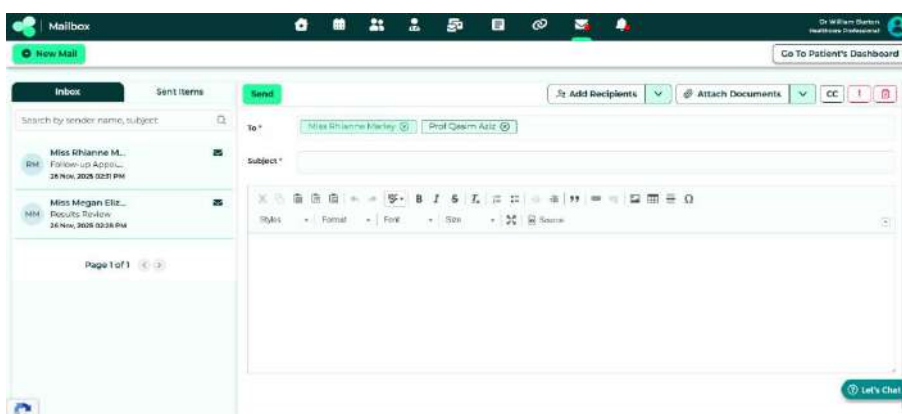
**HCP by name, specialty or medical facility.**



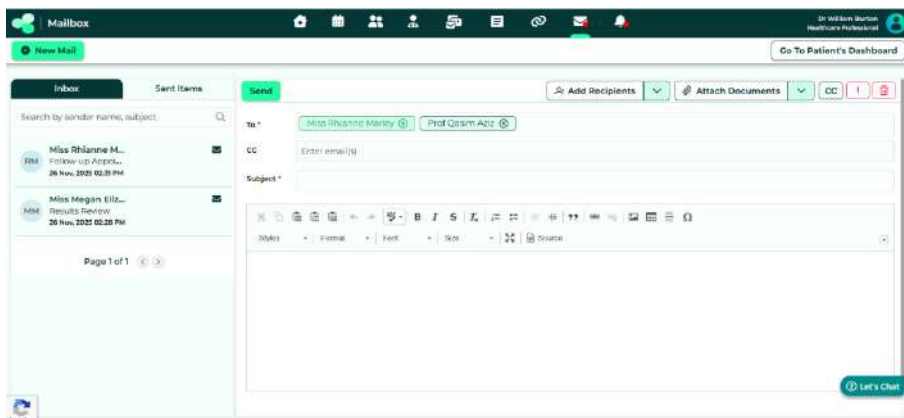
- You have the option to favourite an HCP listed by clicking on the **Add to Favourite List** star.



- Select the HCP you wish to include on the email and click **Add**. You will now see them listed as a recipient in the To field.



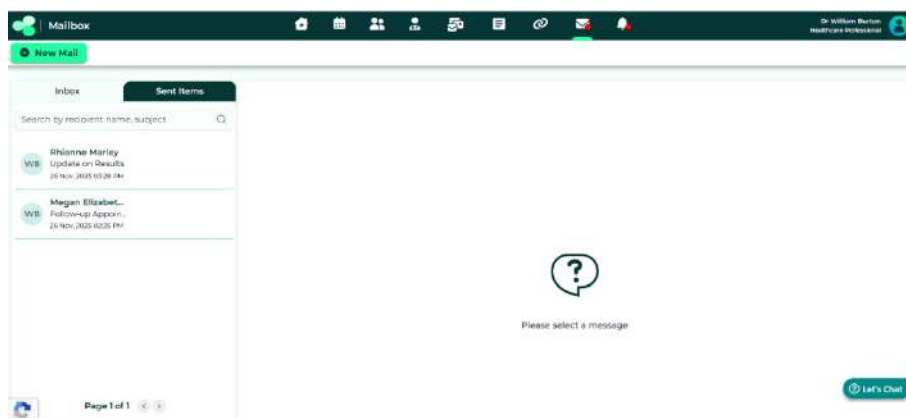
- To send the email to a **Healthcare Professional** not registered on Evitas. Click on the **CC** icon and type in the email address(es) of additional recipients.



- Complete the mandatory **Subject** field and compose your email. If you want to attach documents to your email click on **Attach Documents** and select from your computer.
- When you have added all recipients to your email and completed your **Subject** and **Message**, click **Send** or the **Bin** icon if you do not want to send it .

Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress.

You can now see your sent an email by clicking on **Sent Items**.



## Correspondence Letters

Evitas is a complete patient management system which allows you to send all correspondence directly to your patients through the platform. Correspondence sent will be visible to the Patient on their Dashboard as soon as it has been sent.

To begin sending correspondence to **Patients** (and other HCP professionals), you will need to create your letterhead and e-signature which you can do by referring to the section below **Letterhead & E-signatures**.

At any point, you can click on the (i) icon to read a brief guide on what to fill in the forms.

Within **Correspondence Letters**, you have two options **Incoming** and **Outgoing**.

**Incoming** correspondence can be documents received from **Patients** who are already on Evitas who you are connected with (**Internal Patients**), documents from other sources for **Internal Patients** or can be potential **Patients** who have contacted you to request a consultation who are yet to register on Evitas (**External Patients**).

**Outgoing** correspondence are documents that you (or your secretaries) have created within Evitas that need to be sent to a **Connected Patient** and other HCPs who may be on Evitas or may be external.

The screenshot shows the 'Correspondence Letters' interface. At the top, it says 'You are currently viewing Incoming Letters'. Below this is a table with columns: Letter Type, Template Name, Created By, Patient Details, Date, Status, Flag, and Action. The table contains 10 rows of data. On the left side, there are navigation options for 'incoming' and 'outgoing'.

Letter Type	Template Name	Created By	Patient Details	Date	Status	Flag	Action
Clinical Letter	Not Specified	Miss Karen Masters Nov 9, 2025	#Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 9, 2025	Completed	Routine	[Icons]
Discharge Summary	Not Specified	Miss Karen Masters Nov 9, 2025	#George Clooney (DOB: 04-11-1961)	Nov 9, 2025	Completed	Routine	[Icons]
Text	Not Specified	Miss Karen Masters Jul 26, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Jul 26, 2025	Action Required	Routine	[Icons]
Clinical Letter	Not Specified	Miss Karen Masters Jul 26, 2025	Karen Masters (DOB: 01-07-1997)	Jul 23, 2025	Awaiting Review	Routine	[Icons]
Clinical Letter	Not Specified	Miss Karen Masters Jun 30, 2025	George Clooney (DOB: 21-06-2000)	Jun 30, 2025	Awaiting Review	Routine	[Icons]
Discharge Summary	Not Specified	Miss Karen Masters Jun 15, 2025	#Mr George Clooney (AMH-P-172) (DOB: 02-06-1960)	Jun 10, 2025	Completed	Routine	[Icons]
Referral Request	Not Specified	Miss Karen Masters Jun 15, 2025	#Fred Boga (DOB: 01-06-2011)	Jun 9, 2025	Completed	Routine	[Icons]
Referral Request	Not Specified	Miss Karen Masters Mar 26, 2025	Karen Elizabeth Masters (DOB: 22-03-1977)	Mar 26, 2025	Action Required	Routine	[Icons]

## Incoming Correspondence

**Incoming** correspondence can be documents received from patients who are already on Evitas who you are connected to (**Internal Patients**), documents from other sources for **Internal Patients** or can be potential **Patients** who have contacted you to request a consultation who are yet to register on Evitas (**External Patients**).

Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress.

- Click the arrow next to Incoming, you will see a drop-down menu showing **Statuses**, **Upload Document** & **Archive Documents**.

The screenshot shows the 'Correspondence Letters' interface with a dropdown menu open for the 'Incoming' section. The dropdown menu contains three options: 'Statuses', 'Upload Document (4)', and 'Archive Document(s)'. The table below the dropdown is identical to the one in the previous screenshot.

- Click on **Statuses** to show the status of **Incoming** correspondence, the brackets after each indicate the number of documents with that **Status**.
  - Action Required
  - Awaiting Review

- Completed

Clicking on each **Status** will display those letters on screen with that **Status**. There are columns for **Letter Type**, **Template Name**, **Created On**, **Created By**, **Patient Name**, **Patient DOB**, **Date of Letter**, **Status**, **Flag** and **Actions**.

Letter Type	Template Name	Created By	Patient Details	Date	Status	Flag	Action
Clinical Letter	Not Specified	Miss Karen Masters Nov 9, 2025	# Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 9, 2025	Completed	Routine	[PDF] [Print] [Share] [More]
Discharge Summary	Not Specified	Miss Karen Masters Nov 9, 2025	# George Clooney (DOB: 04-11-1961)	Nov 9, 2025	Completed	Routine	[PDF] [Print] [Share] [More]
Test	Not Specified	Miss Karen Masters Jul 28, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Jul 28, 2025	Action Required	Routine	[PDF] [Print] [Share] [More]
Clinical Letter	Not Specified	Miss Karen Masters Jul 28, 2025	Karen Masters (DOB: 01-07-1997)	Jul 23, 2025	Awaiting Review	Routine	[PDF] [Print] [Share] [More]
Clinical Letter	Not Specified	Miss Karen Masters Jun 30, 2025	George Clooney (DOB: 21-06-2000)	Jun 30, 2025	Awaiting Review	Routine	[PDF] [Print] [Share] [More]
Discharge Summary	Not Specified	Miss Karen Masters Jun 15, 2025	# Mr George Clooney (AMH-P-172) (DOB: 02-06-1960)	Jun 10, 2025	Completed	Routine	[PDF] [Print] [Share] [More]
Referral Request	Not Specified	Miss Karen Masters Jun 15, 2025	# Fred Blegs (DOB: 01-06-2019)	Jun 9, 2025	Completed	Routine	[PDF] [Print] [Share] [More]
Referral Request	Not Specified	Miss Karen Masters Mar 26, 2025	Karen Elizabeth Masters (DOB: 22-03-1977)	Mar 26, 2025	Action Required	Routine	[PDF] [Print] [Share] [More]

Correspondence with the **Action Required Status** can:

- Be viewed on screen by clicking the PDF icon
- Be downloaded
- Be printed
- Have their status changed
- Be shared with HCPs on Evitas or external to Evitas

Correspondence with the **Awaiting Review Status** can:

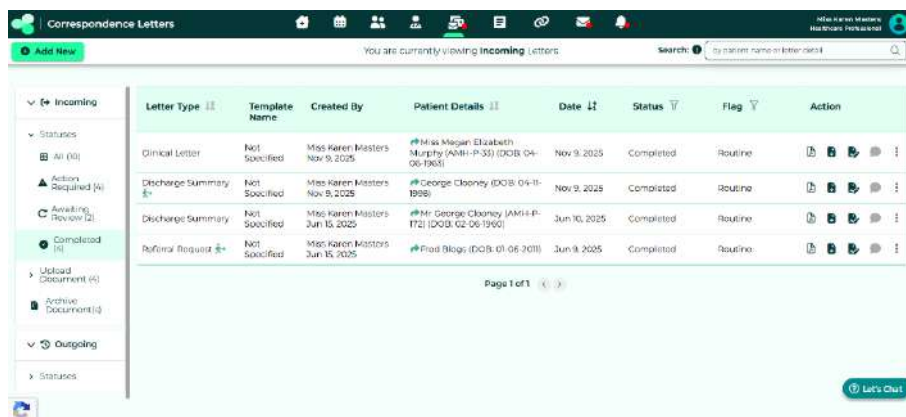
- Be viewed on screen by clicking the PDF icon
- Be downloaded
- Be printed
- Have their status changed
- Be shared with HCPs on Evitas or external to Evitas

Letter Type	Template Name	Created By	Patient Details	Date	Status	Flag	Action
Clinical Letter	Not Specified	Miss Karen Masters Jul 28, 2025	Karen Masters (DOB: 01-07-1997)	Jul 23, 2025	Awaiting Review	Routine	[PDF] [Print] [Share] [More]
Clinical Letter	Not Specified	Miss Karen Masters Jun 30, 2025	George Clooney (DOB: 21-06-2000)	Jun 30, 2025	Awaiting Review	Routine	[PDF] [Print] [Share] [More]

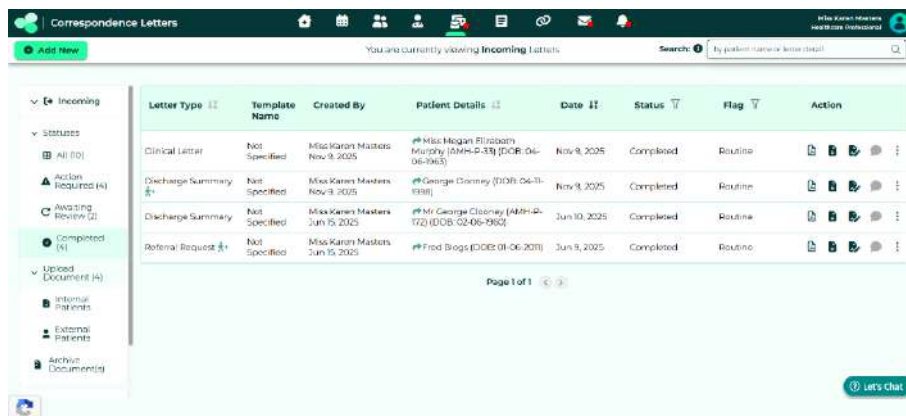
Correspondence with the **Completed Status** can:

- Be viewed on screen by clicking the PDF icon
- Be downloaded
- Be printed
- Have their status changed

- Be shared with HCPs on Evitas or external to Evitas
- Archived

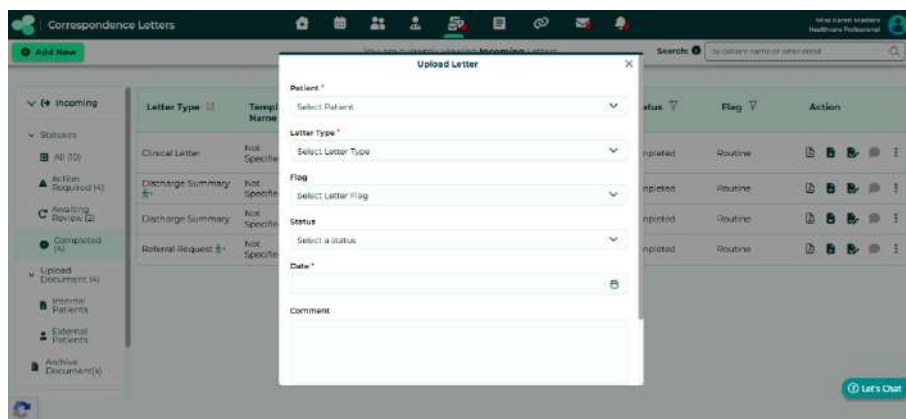


- To add an **Incoming** document, click on **Upload Document**, you will see a drop-down menu with options of **Internal Patients** and **External Patients**.

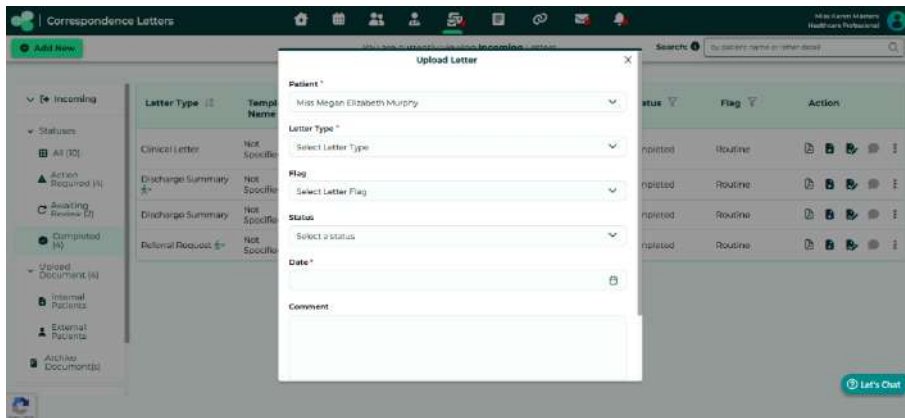


## Internal Patients

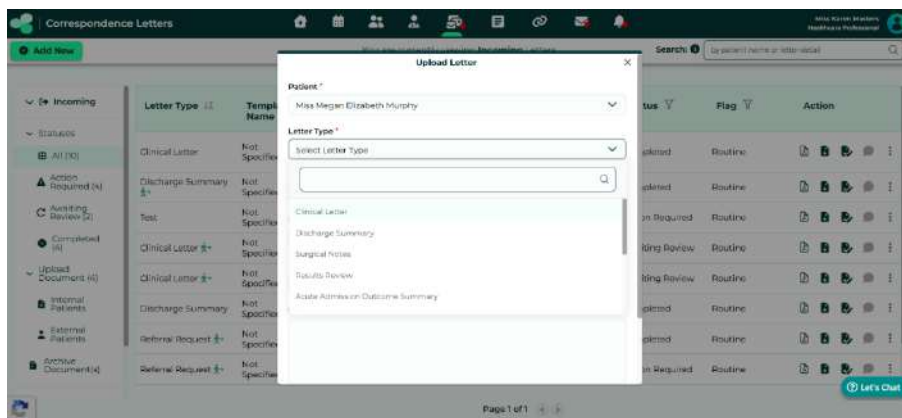
- Click on **Internal Patients** to add a document from a **Connected Patient** who is on Evitas. An **Upload Letter** pop-up will appear.



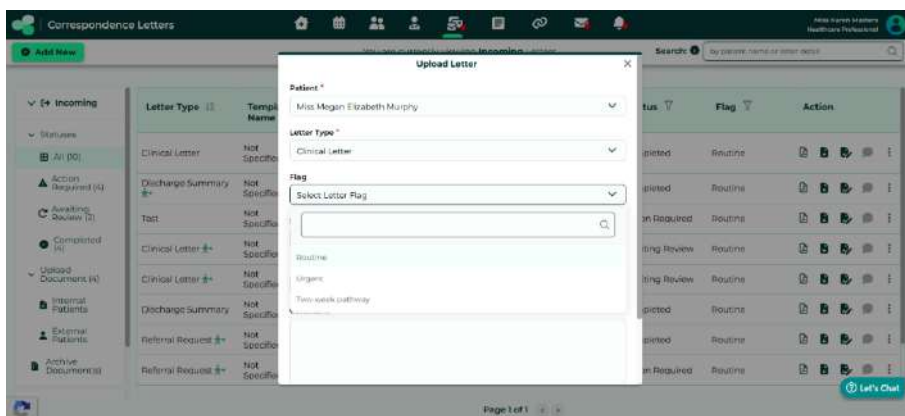
- Click the down arrow in the **Patient** field and select the **Patient** the document/letter has come from.



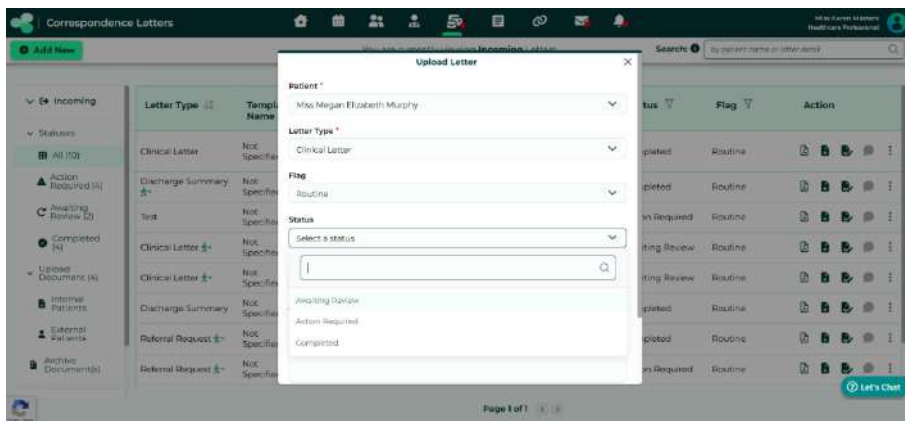
- Click the down arrow in the **Letter Type** field and select the appropriate option. If there is no relevant option, select **Other**.



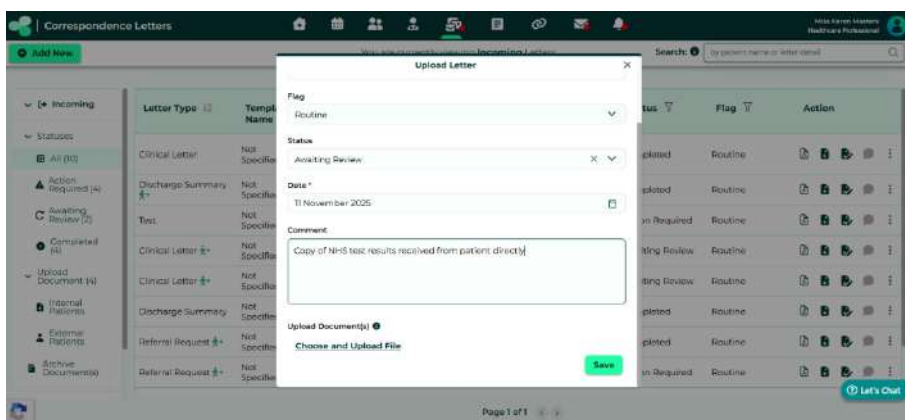
- Click the down arrow in the **Flag** field and select the relevant option.



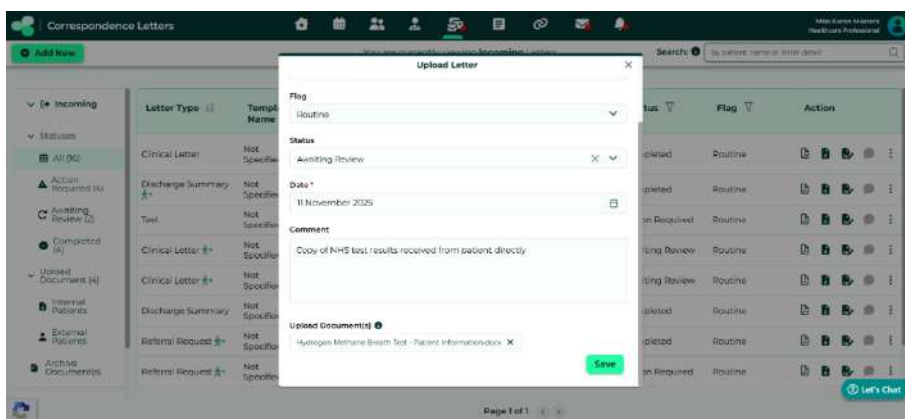
- Click the down arrow in the **Status** field to display options. Select the desired option.



- Select a date using the calendar function the **Date** field.
- The **Comments** field is a free text box so can be populated with anything relevant.



- Click on **Choose and Upload File**. This will take you to your device where you can select the relevant document.



The **Uploaded Document** is visible with an option to delete using the cross if uploaded in error.

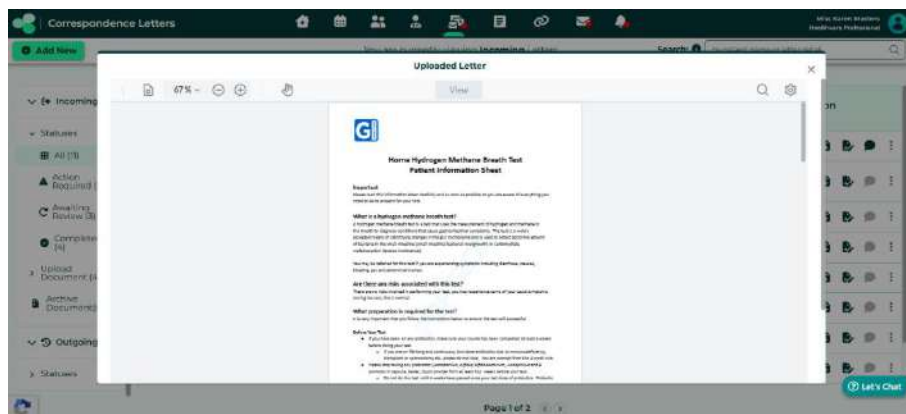
- Click **Save**

- **Uploaded** correspondence can now be viewed by clicking the relevant **Status** allocated to display on screen. In this example, the **Uploaded Document** was given a **Status of Awaiting Review** so can be seen on the **Awaiting Review** screen.

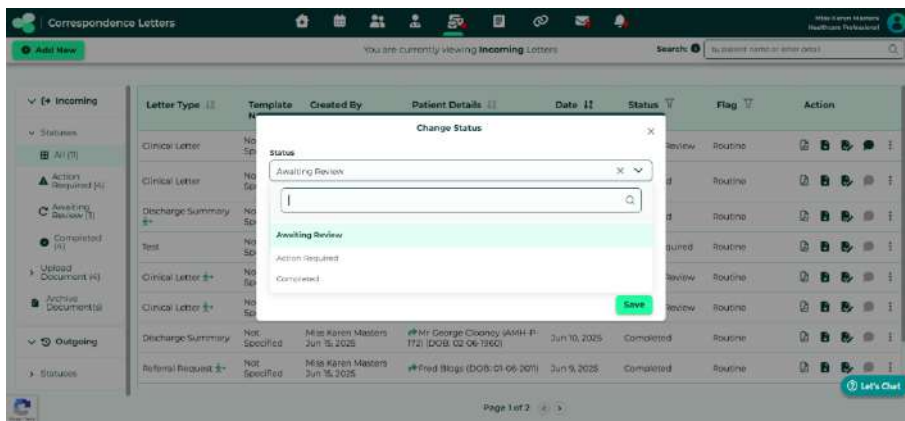
Letter Type	Template Name	Created By	Patient Details	Date	Status	Flag	Action
Clinical Letter	Not Specified	Miss Karen Masters Nov 27, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 11, 2025	Awaiting Review	Routine	[Icons]
Clinical Letter	Not Specified	Miss Karen Masters Nov 9, 2025	#Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 9, 2025	Completed	Routine	[Icons]
Discharge Summary	Not Specified	Miss Karen Masters Nov 9, 2025	#George Clooney (DOB: 04-11-1958)	Nov 9, 2025	Completed	Routine	[Icons]
Test	Not Specified	Miss Karen Masters Jul 28, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Jul 28, 2025	Action Required	Routine	[Icons]
Clinical Letter	Not Specified	Miss Karen Masters Jul 28, 2025	Karen Masters (DOB: 01-07-1997)	Jul 25, 2025	Awaiting Review	Routine	[Icons]
Clinical Letter	Not Specified	Miss Karen Masters Jun 30, 2025	George Clooney (DOB: 21-06-2000)	Jun 30, 2025	Awaiting Review	Routine	[Icons]
Discharge Summary	Not Specified	Miss Karen Masters Jun 15, 2025	#Mr George Clooney (AMH-P-172) (DOB: 02-06-1960)	Jun 10, 2025	Completed	Routine	[Icons]
Referral Request	Not Specified	Miss Karen Masters Jun 15, 2025	#Fred Blogs (DOB: 01-08-2011)	Jun 9, 2025	Completed	Routine	[Icons]

Uploaded correspondence can:

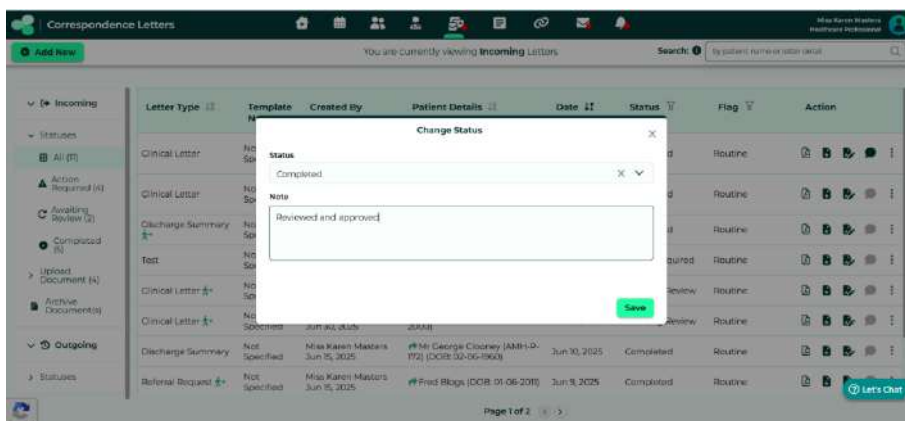
- Be viewed on screen
- Be downloaded
- Be printed
- Have their status changed
- Shared with HCPs on Evitas or external to Evitas
- Click on **View PDF icon** under **Actions**.



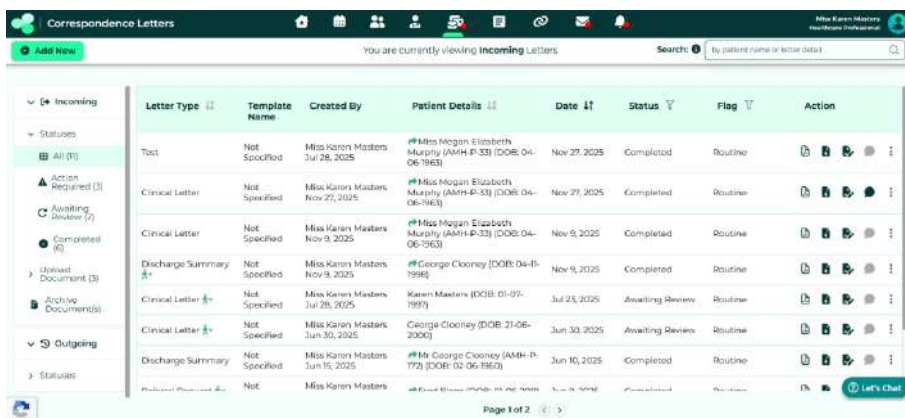
- Click on **Download icon** under **Actions** to download the document to your device.
- Click on **Print icon** under **Actions** to send the document to your printer.
- Click on **Change Status icon** under **Actions**.



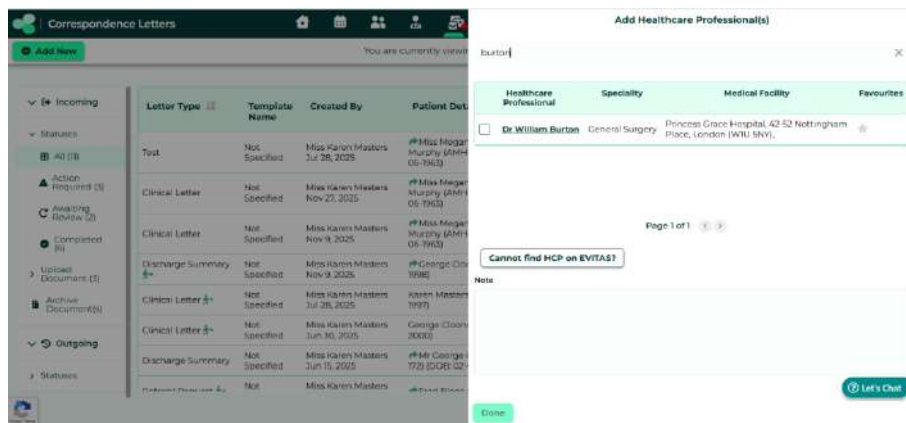
- Click the down arrow in the **Status** field to display options. Select the desired option. The **Notes** field is a free text box.



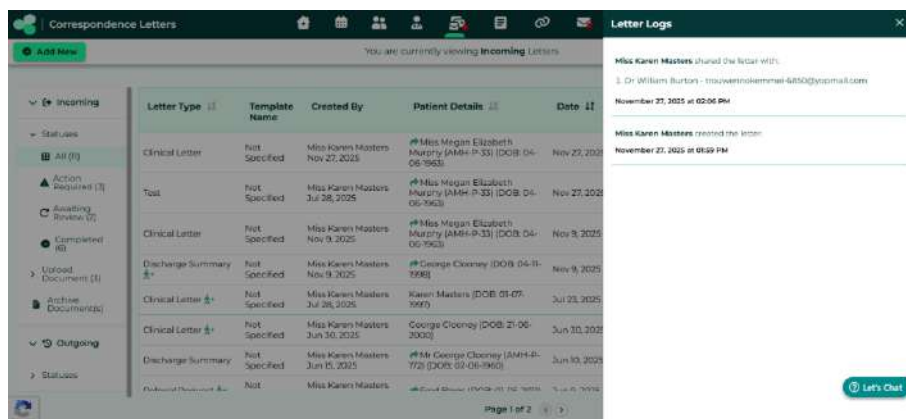
- Click **Save**. The **Status** of the of document will now be changed.



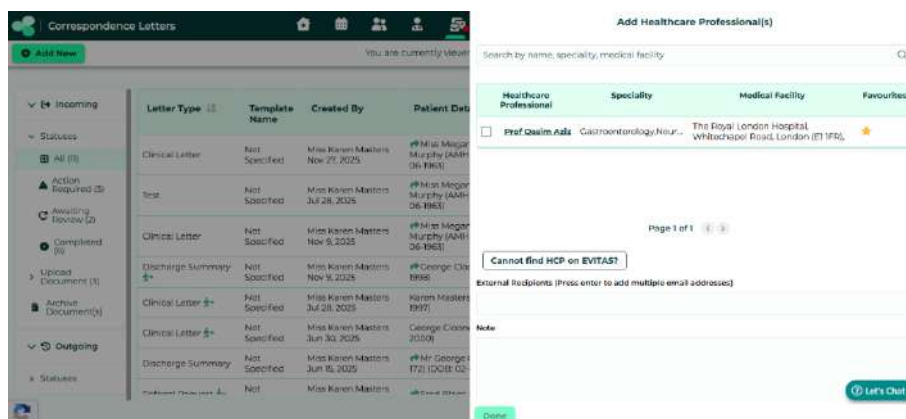
- Click on the three dots under **Actions**, a drop-down menu appears with an option to **Share**. Only documents that have a status of Completed can be shared. A pop up **Add Healthcare Professional(s)** appears with the option to search. If an **Healthcare Professional** has been selected previously and categorised as a favourite they will be displayed below. Searching by HCP name or medical facility will display all relevant options.



- Select the HCP you would like to send the correspondence to and click **Done**. A sent successfully notification appears on screen.
- Click on the three dots under **Actions**, a drop-down menu appears with an option **Letter Logs**. Click on this and you will see an audit history for the correspondence.

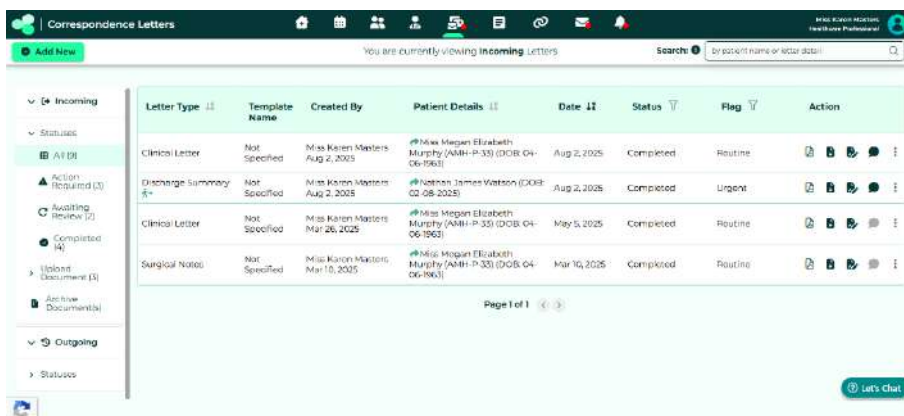


- If the HCP you wish to send correspondence to is not on Evitas, click on **Cannot Find HCP on Evitas**. Pop up fields appear which need to be completed with the **External Recipient(s)** email address(es) and a free text **Notes** field.



- Click **Done**. A sent successfully notification appears on screen.

- If you wish to **Archive** correspondence so that is not visible on your **Incoming Letters** screen, click on **Archive Documents** under the **Incoming** menu. Document is removed to **Archive Documents**. Only documents that have a **Status of Completed** can be **Archived**. Click on **Archive Documents** to view.

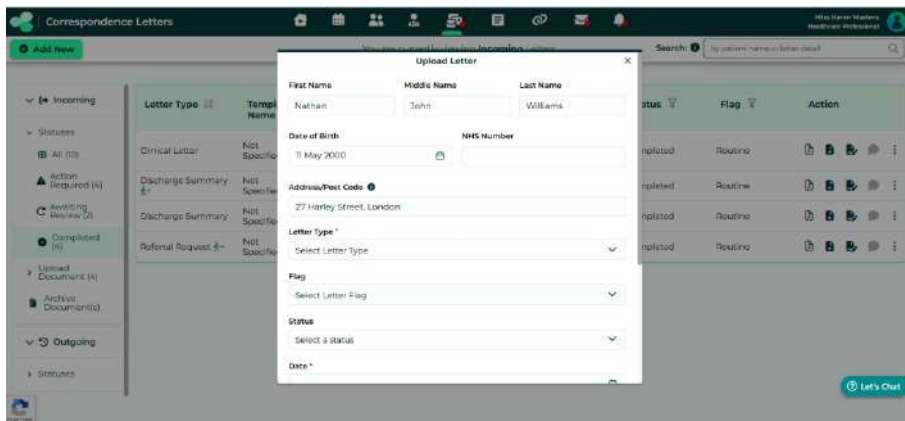


## External Patients

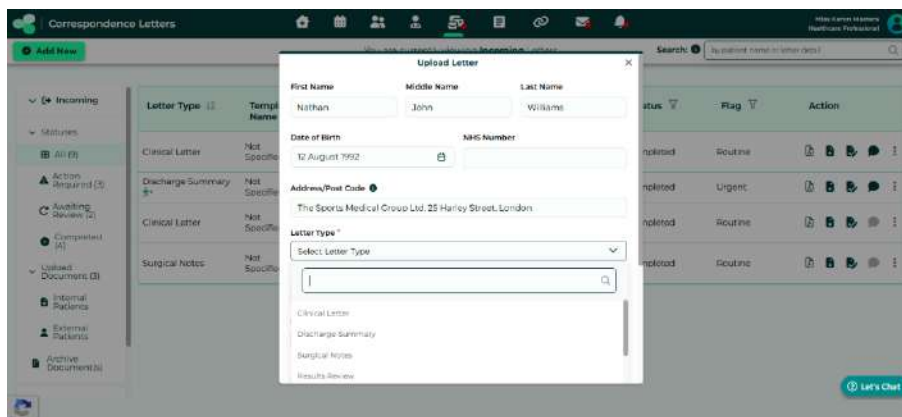
- Click on **External Patients** to add a document from a **Patient** who is not registered on Evitas. An **Upload Letter** pop-up will appear.



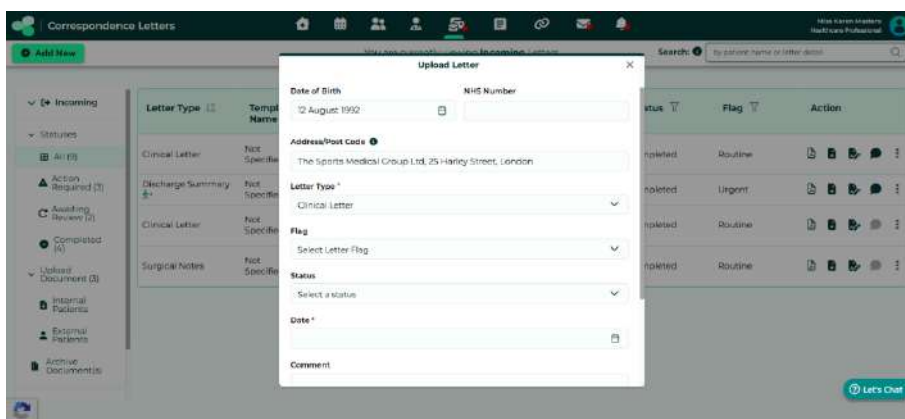
- Complete the following fields – **First Name, Middle Name, Last Name, Date of Birth, NHS Number and Address**.



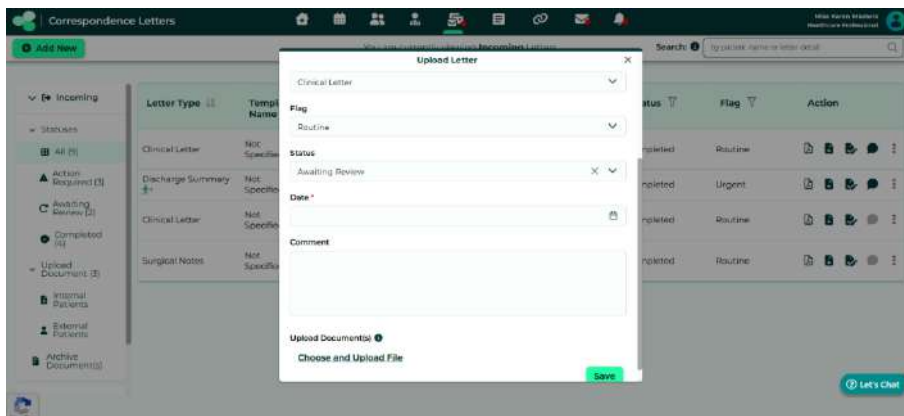
- Click the down arrow in the **Letter Type** field and select the appropriate option. If there is no relevant option, select **Other**.



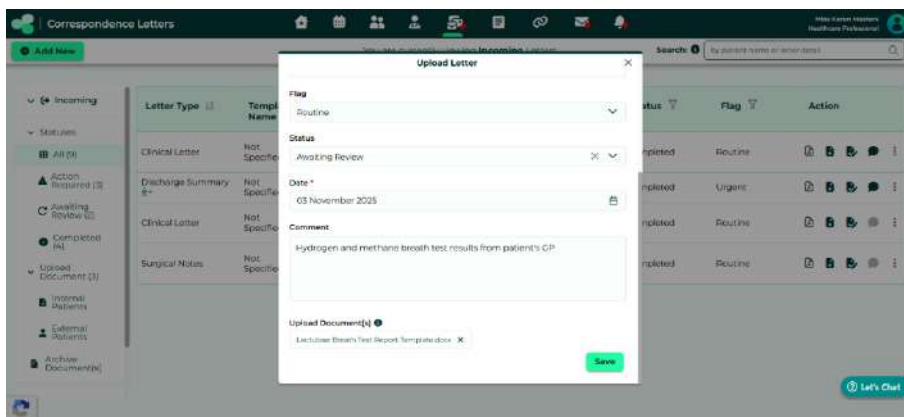
- Click the down arrow in the **Flag** field and select the relevant option.



- Click the down arrow in the **Status** field to display options. Select the desired option.



- Select a date using the calendar function the **Date** field.
- The **Comments** field is a free text box so can be populated with anything relevant.
- Click on **Choose and Upload File**. This will take you to your device where you can select the relevant document.



The **Uploaded Document** is visible with an option to delete using the cross if uploaded in error.

- Click **Save**
- **Uploaded** correspondence can now be viewed by clicking the relevant **Status** allocated to display on screen. In this example, the **Uploaded Document** was given a **Status** of **Awaiting Review** so can be seen on the **Awaiting Review** screen.

This screenshot shows the 'Incoming Letters' section of the Evitas software. The interface includes a search bar at the top right and a sidebar on the left with navigation options like 'Add New', 'Statuses', 'Action Required', 'Awaiting Review', 'Completed', 'Upload Document', and 'Archive Documents'. The main area displays a table of letters with columns for Letter Type, Template Name, Created By, Patient Details, Date, Status, Flag, and Action.

Letter Type	Template Name	Created By	Patient Details	Date	Status	Flag	Action
Clinical Letter	Not Specified	Miss Karen Masters Nov 27, 2025	Marley Anne Eutterworth (DOB: 04-11-2025)	Nov 27, 2025	Awaiting Review	Routine	[Icons]
Clinical Letter	Not Specified	Miss Karen Masters Nov 27, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 27, 2025	Completed	Routine	[Icons]
Text	Not Specified	Miss Karen Masters Jul 28, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 27, 2025	Completed	Routine	[Icons]
Clinical Letter	Not Specified	Miss Karen Masters Nov 9, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 9, 2025	Completed	Routine	[Icons]
Discharge Summary	Not Specified	Miss Karen Masters Nov 9, 2025	George Clooney (DOB: 04-11-1958)	Nov 9, 2025	Completed	Routine	[Icons]
Clinical Letter	Not Specified	Miss Karen Masters Nov 27, 2025	Nathan John Williams (DOB: 12-08-1992)	Nov 3, 2025	Awaiting Review	Routine	[Icons]
Clinical Letter	Not Specified	Miss Karen Masters Jul 28, 2025	Karen Masters (DOB: 01-07-1997)	Jul 23, 2025	Awaiting Review	Routine	[Icons]
Clinical Letter	Not Specified	Miss Karen Masters	George Clooney (DOB: 21-06-1958)	Nov 27, 2025	Awaiting Review	Routine	[Icons]

Any correspondence uploaded for an **External Patient** will display a blue person icon. When you hover over this icon it displays **External Patient**.

- See above details on the **Actions** that can be taken for an **Uploaded** document.

## Outgoing

**Outgoing** correspondence are documents that you (or your secretaries) have created within Evitas that need to be sent to a **Connected Patient** and other **HCP** who may be on Evitas or may be external.

- Click the arrow next to **Outgoing**, you will see a drop-down menu showing **Statuses**.

This screenshot shows the 'Outgoing Letters' section of the Evitas software. The interface is similar to the 'Incoming Letters' view, with a search bar and a sidebar. The main table lists outgoing letters with columns for Letter Type, Template Name, Created By, Patient Details, Date, Status, Flag, and Action.

Letter Type	Template Name	Created By	Patient Details	Date	Status	Flag	Action
Clinical Letter	Text Template Today 2	Miss Karen Masters Nov 17, 2025	Miss Rhianne Marley (AMH-P-188) (DOB: 10-05-1990)	Nov 17, 2025	Completed	Not Specified	[Icons]
Results Review	Results	Miss Karen Masters Nov 17, 2025	Miss Rhianne Marley (AMH-P-188) (DOB: 10-05-1990)	Nov 17, 2025	Completed	Urgent	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Nov 17, 2025	Miss Rhianne Marley (AMH-P-188) (DOB: 10-05-1990)	Nov 17, 2025	Reviewed	Not Specified	[Icons]
Clinical Letter	Text 22 July	Miss Karen Masters Nov 10, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 10, 2025	Reviewed	Routine	[Icons]
Clinical Letter	New Template	Miss Karen Masters Nov 10, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 10, 2025	Awaiting Correction	Not Specified	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Jun 30, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 9, 2025	Draft	Not Specified	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Jul 7, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 9, 2025	Completed	Two week pathway	[Icons]
Clinical Letter	New Template	Miss Karen Masters Aug 2, 2025	Mr Aaron Flanagan (AMH-P-358) (DOB: 12-09-1990)	Nov 9, 2025	Reviewed	Routine	[Icons]

- Click on **Statuses** to show the status of **Outgoing** correspondence, the brackets after each indicate the number of documents with that **Status**.
  - All
  - Draft
  - Awaiting Correction
  - Awaiting Review
  - Completed

Clicking on each **Status** will display those letters on screen with that **Status**. There are columns for **Letter Type, Template Name, Created On, Created By, Patient Name, Patient DOB, Date of Letter, Status, Flag and Actions**.

Letter Type	Template Name	Created By	Patient Details	Date	Status	Flag	Action
Clinical Letter	Clinical Safety	Miss Karen Masters Jun 30, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 9, 2025	Draft	Not Specified	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Jun 29, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Jun 29, 2025	Draft	Not Specified	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Jun 29, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Jun 29, 2025	Draft	Not Specified	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Jun 29, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Jun 29, 2025	Draft	Not Specified	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Jun 19, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Jun 19, 2025	Draft	Not Specified	[Icons]
Clinical Letter	Training	Miss Karen Masters Jun 18, 2025	Mr George Clearey (AMH-P-77) (DOB: 02-06-1960)	Jun 18, 2025	Draft	Routine	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Jun 17, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Jun 17, 2025	Draft	Not Specified	[Icons]
Clinical Letter	Training	Miss Karen Masters Jun 17, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Jun 17, 2025	Draft	Not Specified	[Icons]
Clinical Letter	Training	Miss Karen Masters Jun 16, 2025	Mr George Clearey (AMH-P-77) (DOB: 02-06-1960)	Jun 16, 2025	Draft	Not Specified	[Icons]

Correspondence with the **Draft Status** can be:

- Viewed on screen
- Downloaded
- Edited
- Printed

Correspondence with the **Awaiting Correction Status** can be:

- Viewed on screen
- Downloaded
- Edited
- Printed

Correspondence with the **Awaiting Review Status** can be:

- Viewed on screen
- Downloaded
- Edited
- Printed

Correspondence with the **Reviewed Status** can be:

- Viewed on screen
- Downloaded
- Edited
- Printed
- Shared with HCPs on Evitas or external to Evitas

Correspondence with the **Completed Status** can be:

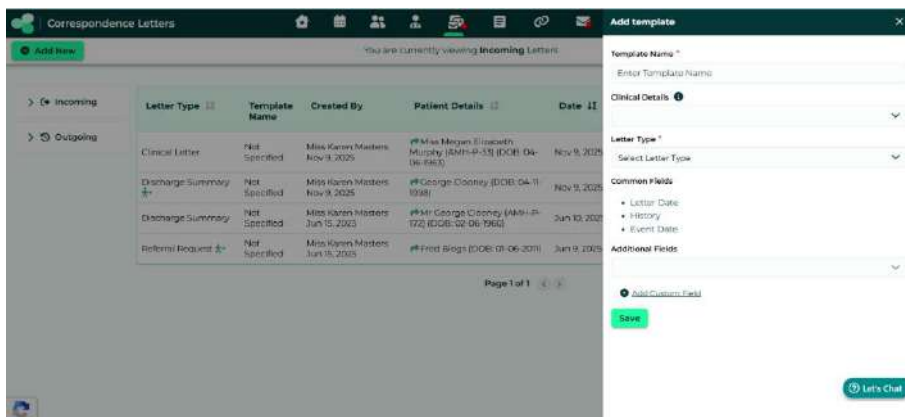
- Viewed on screen
- Downloaded
- Edited
- Printed
- Shared with HCPs on Evitas or external to Evitas

## Creating Outgoing Correspondence

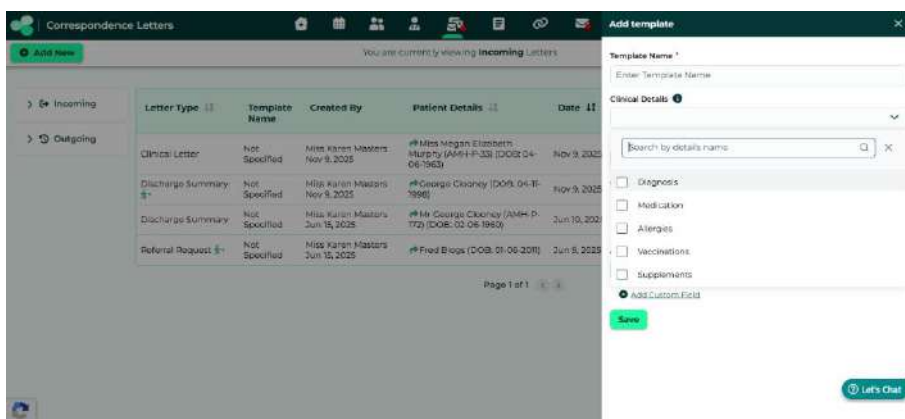
### Templates

Evitas offers you the ability to create templates for correspondence that you use regularly.

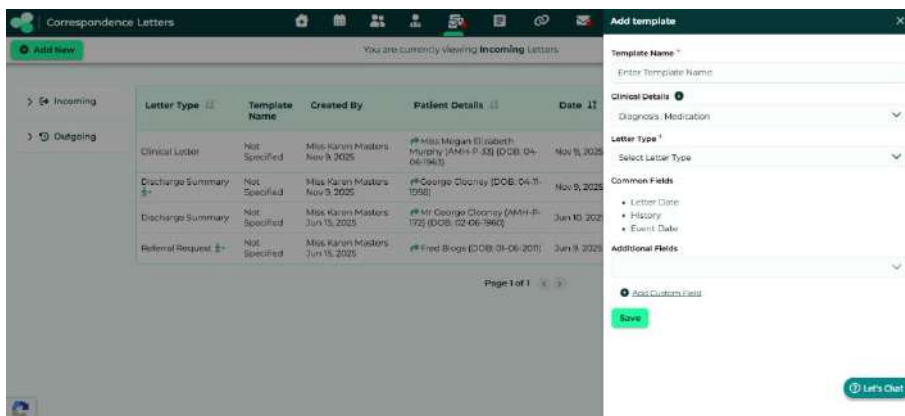
- Click on **(+) Add New** and select **New Template** from the drop-down menu. A pop-up screen **Add Template** appears.



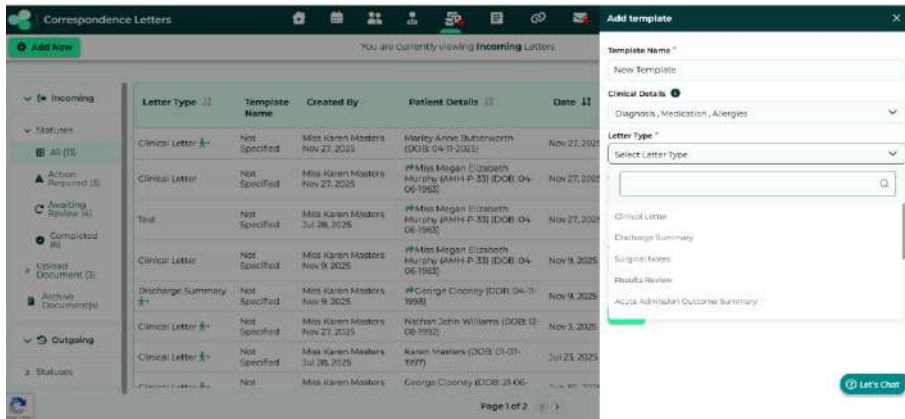
- Give your template a name and add to the **Template Name** field.
- Click on the **Clinical Details** arrow a drop-down menu appears where you can select which **Clinical Details** you would like to appear in the **Template**.



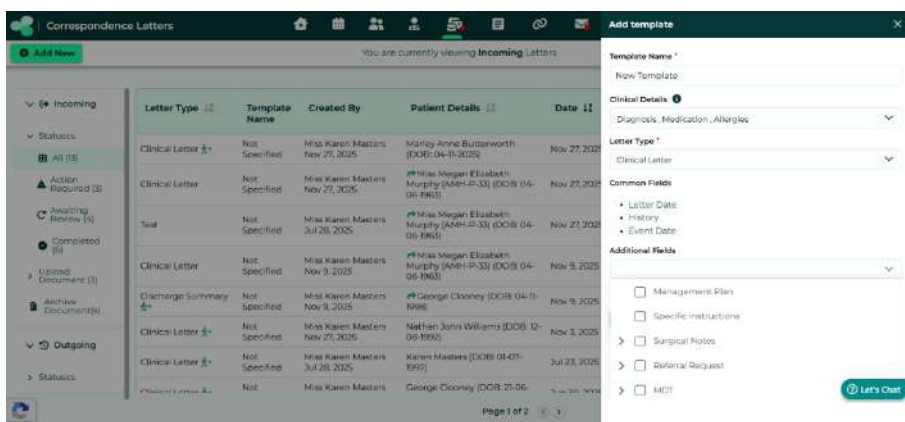
- A list of selected details appears in the **Clinical Details** field.



- Click the **Letter Type** arrow and select a relevant type.

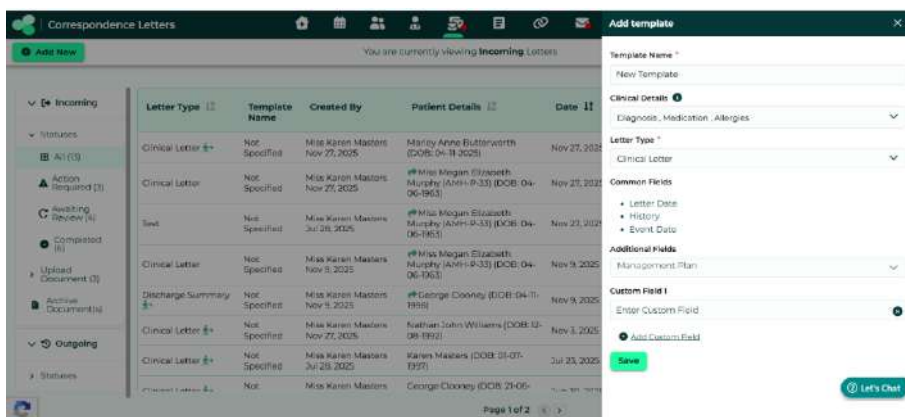


- Click on the **Additional Fields** arrow to select any other fields you would like to include in your template.



You can also create **Custom Fields** if the option you require is not available.

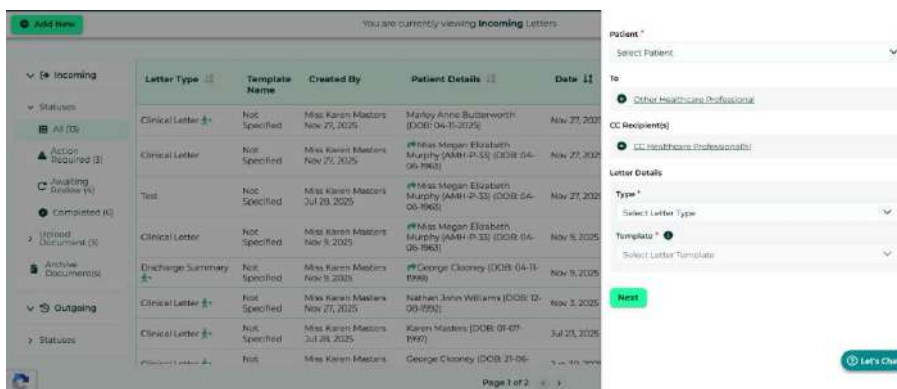
- Click **Add Custom Field** and add name in **Custom Field 1**. You can then add further **Custom Fields** by repeating the process. This will add these fields into your template.



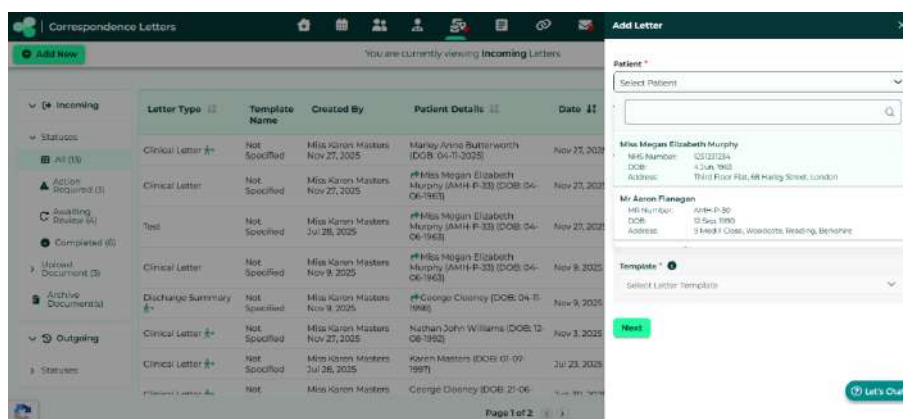
- Click **Save**. **Template** will be available for selection when creating a **New Letter**.

## Letters

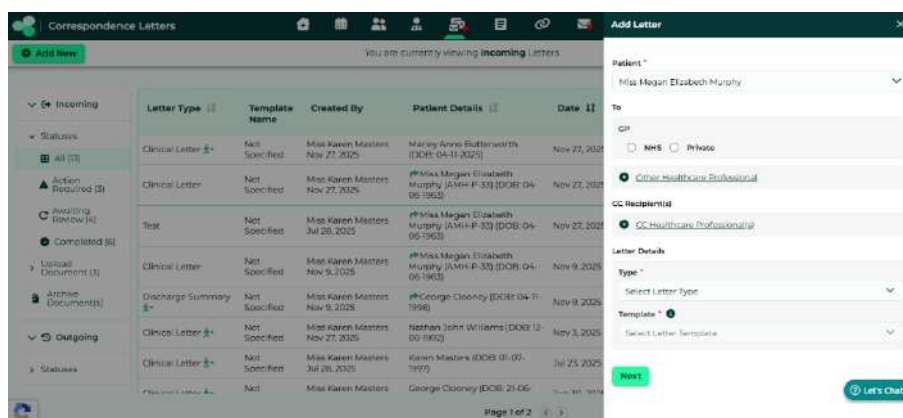
- Click on **(+) Add New** and select **New Letter** from the drop-down menu. A pop-up screen **Add Letter** appears.



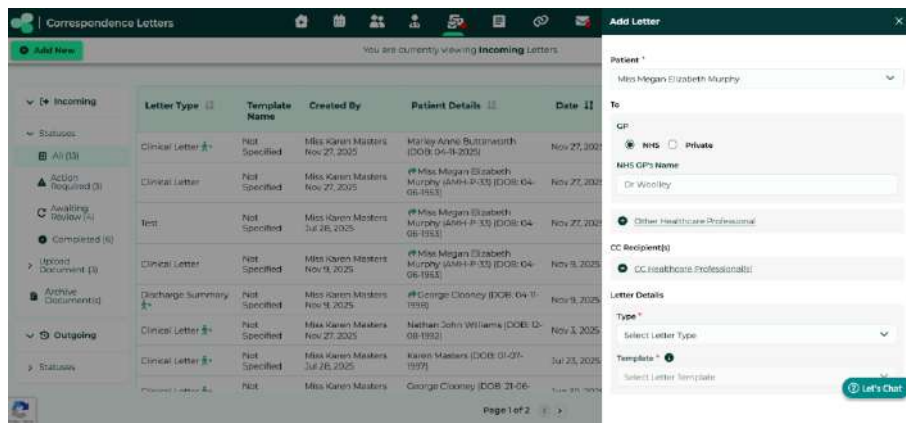
- Click the **Patient** arrow, a drop-down list appears of all **Patients** you are connected to.



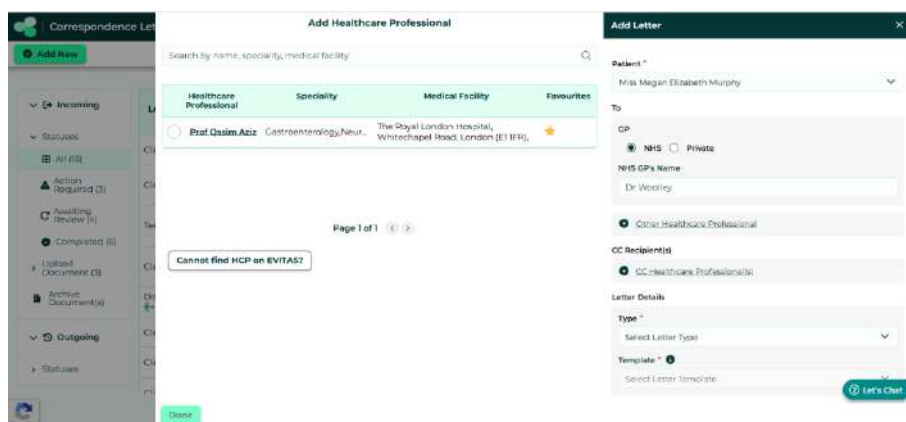
- Select the relevant **Patient**, the name is displayed in the **Patient** field.



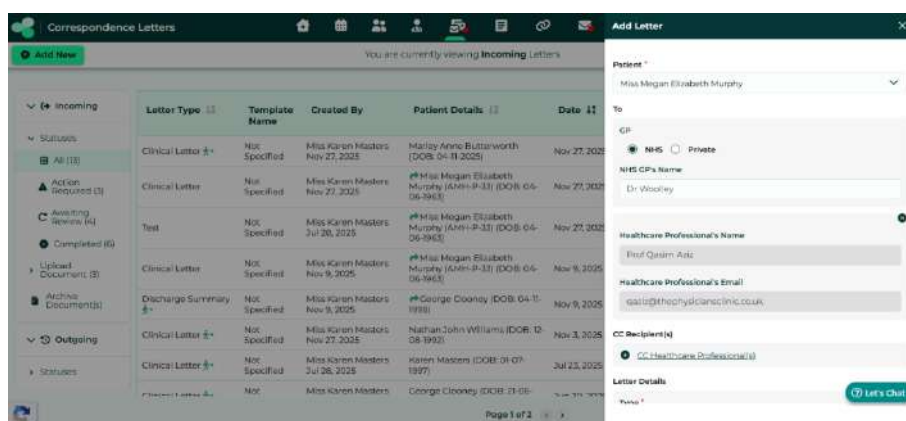
- You now have the option to select HCPs that you wish to receive a copy of this correspondence. If it needs to go to the Patient's GP, check whether NHS or Private and GPs name is listed.



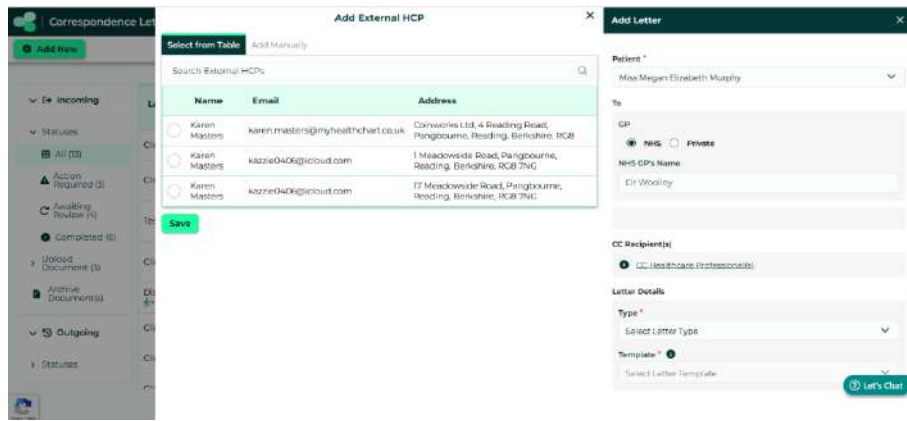
- Click on **(+)** **Other Healthcare Professional** if required. A pop-up appears **Add Healthcare Professional**. You can search for the **Healthcare Professionals** who are on Evitas by name, speciality or medical facility. If an HCP has been designated a favourite they will appear in the list.



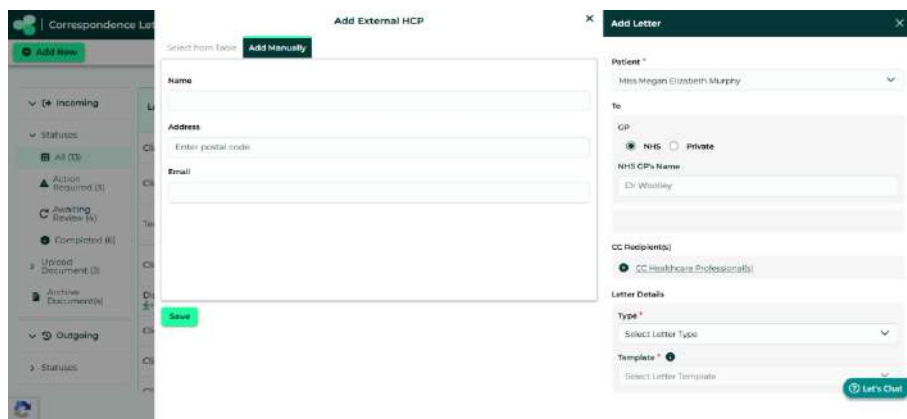
- Select the required **Healthcare Professional** and click **Done**. The name and email address of the selected Healthcare Professional is visible.



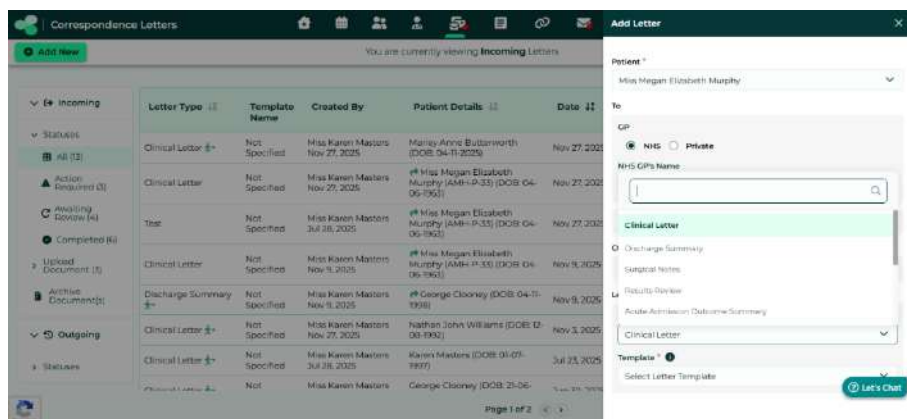
- If you wish to add a **Healthcare Professional** who is not on Evitas, click on **Cannot Find HCP on Evitas**. A pop-up appears **Add External HCP**.



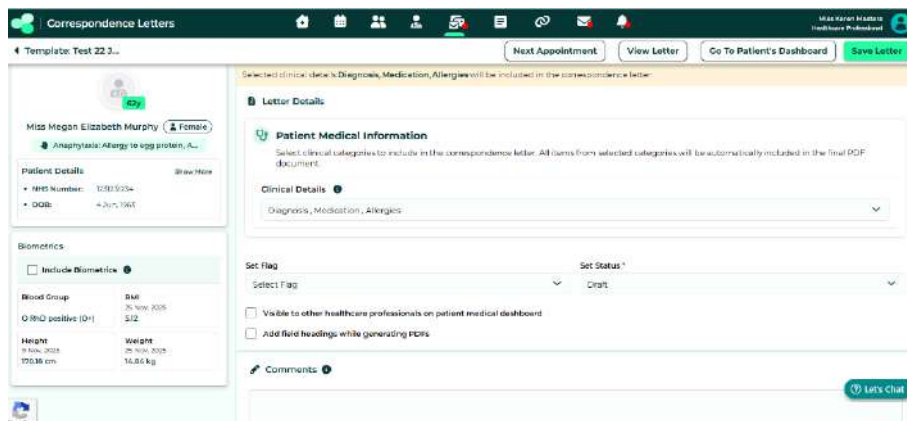
- HCPs that have been used previously will appear in the table. Alternatively you can add an HCP manually by clicking on **Add Manually**. A pop-up appears with fields that need populating.



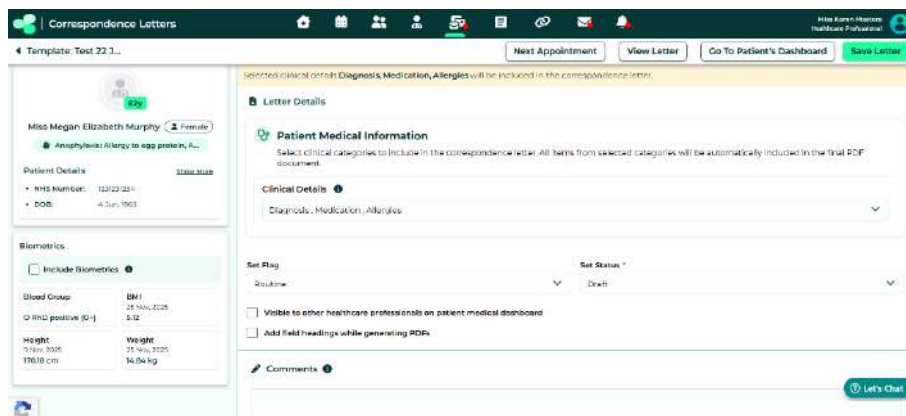
- If you need to add further HCPs, this can be done by clicking on **(+) CC Healthcare Professional** and follow the same steps as described above to select HCPs that are on Evitas or HCPs that are **External**.
- Select a **Letter Type** from the drop-down menu.



- Select a **Letter Template** from the drop-down menu.
- Click **Next**.

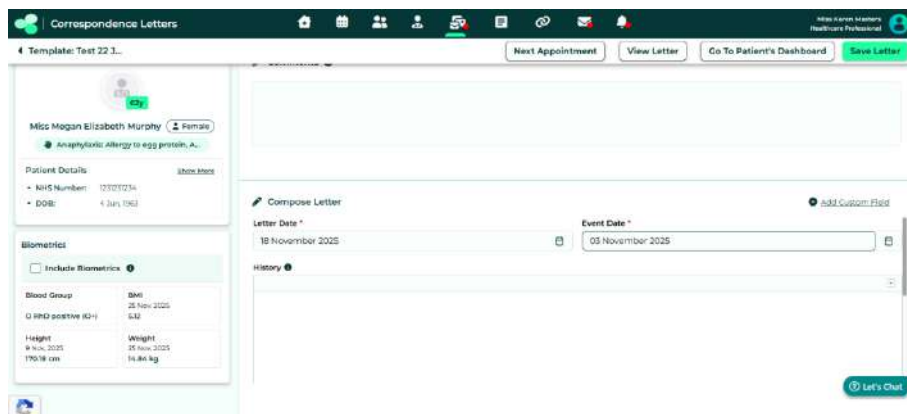


- The **Letter** screen will show the **Patient Details** on the left hand side of the screen. You will then need to create your letter.
- Set a **Flag** for your letter from the options **Routine, Urgent, Two-week Pathway**.
- Set a **Status** for your letter from the options **Draft, Awaiting Correction, Awaiting Review, Reviewed and Completed**.

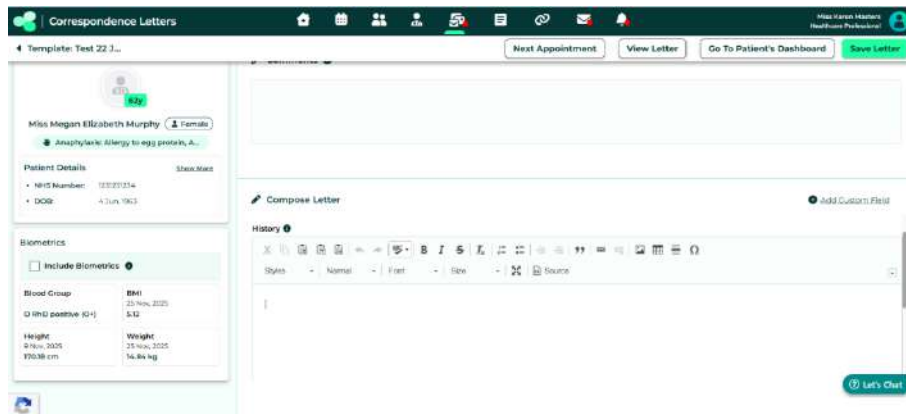


You have the option to make the letter visible to other **Healthcare Professionals** who are connected to the **Patient** by checking **Visible to other healthcare professions on the patient medical dashboard**.

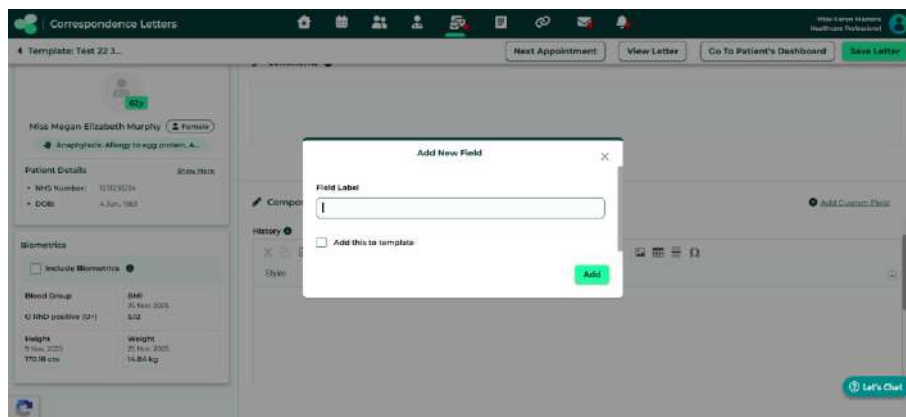
- Under **Compose Letter** add a **Letter Date** and **Event Date** (this may be the date of a scan for example).



- You will then see the fields that you added in your chosen Template. Complete these fields to compose your letter. The arrow in the field opens functions similar to Word.



- If you require any additional fields, click **(+) Add Custom Field**.



- Add a Field Label** and if you wish this field to be added to the chosen **Template** for use in the future check the **Add field to template box**.
- If you would like to review the letter prior to saving, click on **View Letter**.



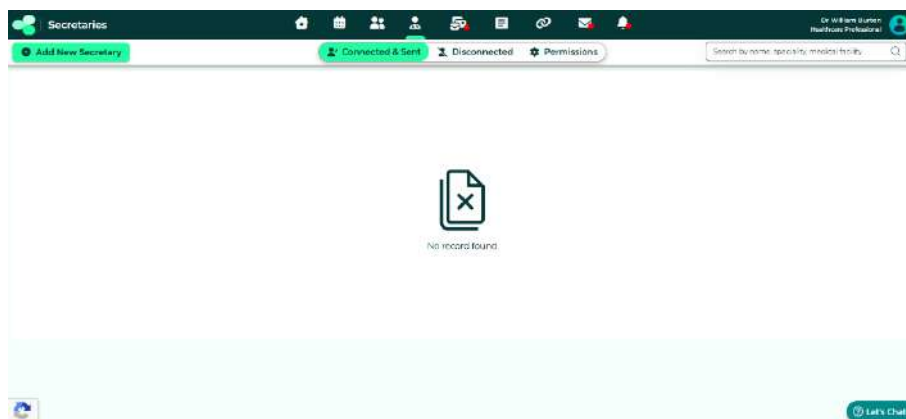
- Click **Save**. The letter will now appear on the **Outgoing Letters** screen where a number of actions can be carried out (as described above) depending on the **Status** of the **Letter**.

Letter Type	Template Name	Created By	Patient Details	Date	Status	Flag	Action
Clinical Letter	Test 22 July	Miss Karen Masters Nov 27, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 27, 2025	Draft	Routine	[Icons]
Clinical Letter	Test Template Today 2	Miss Karen Masters Nov 17, 2025	Miss Rhianna Marley (AMH-P-181) (DOB: 10-05-1990)	Nov 17, 2025	Completed	Not Specified	[Icons]
Results Review	Results	Miss Karen Masters Nov 17, 2025	Miss Rhianna Marley (AMH-P-181) (DOB: 10-05-1990)	Nov 17, 2025	Completed	Urgent	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Nov 17, 2025	Miss Rhianna Marley (AMH-P-181) (DOB: 10-05-1990)	Nov 17, 2025	Reviewed	Not Specified	[Icons]
Clinical Letter	Test 22 July	Miss Karen Masters Nov 10, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 10, 2025	Reviewed	Routine	[Icons]
Clinical Letter	New Template	Miss Karen Masters Nov 10, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 10, 2025	Awaiting Correction	Not Specified	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Jun 30, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 9, 2025	Draft	Not Specified	[Icons]
Clinical Letter	Clinical Safety	Miss Karen Masters Jul 7, 2025	Miss Megan Elizabeth Murphy (AMH-P-33) (DOB: 04-06-1963)	Nov 9, 2025	Completed	Two-week pathway	[Icons]

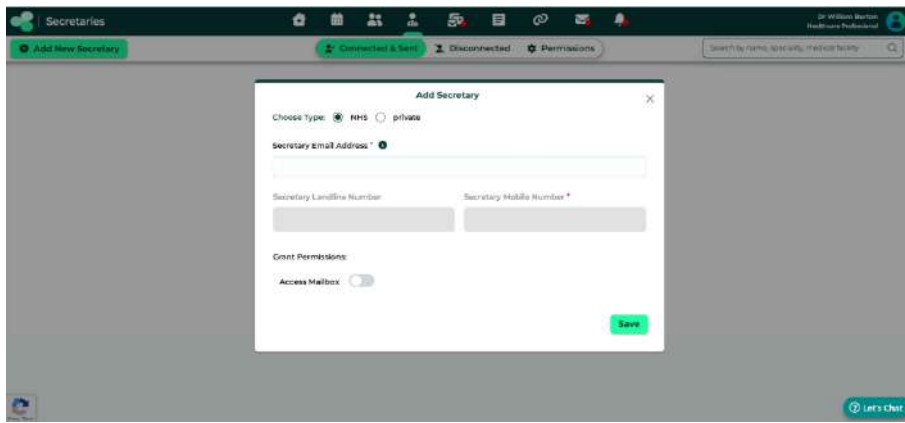
## Secretaries

You can add your **Secretaries** to help manage your **Patients, Appointments, Correspondence** and more. Secretaries will have access to your **Profile** and **Connected Patient Dashboards**. **Secretaries** can act as your proxy but their access and functions they can use is limited. Secretaries are not able to create any clinical records on a **Patient Dashboard**. At any point, you can click on the (i) icon to read a brief guide on what to fill in the forms.

- Click on the **Secretary** icon in the top banner.

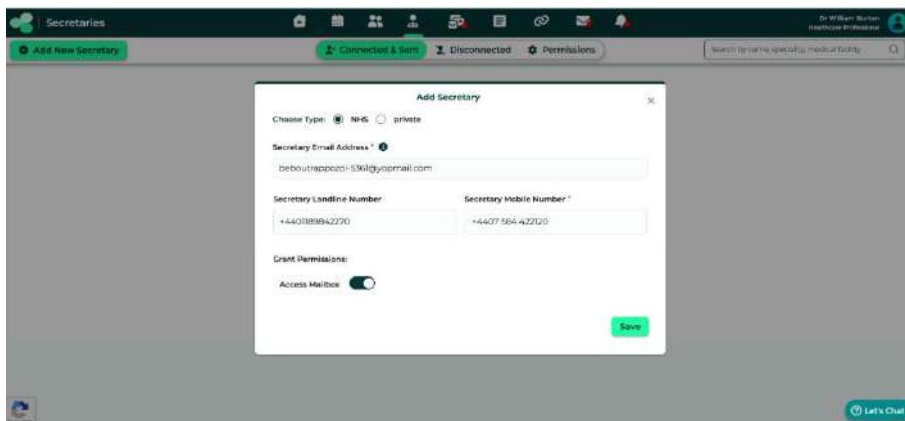


- Click on **(+) Add New Secretary**, the **Add Secretary** screen appears.

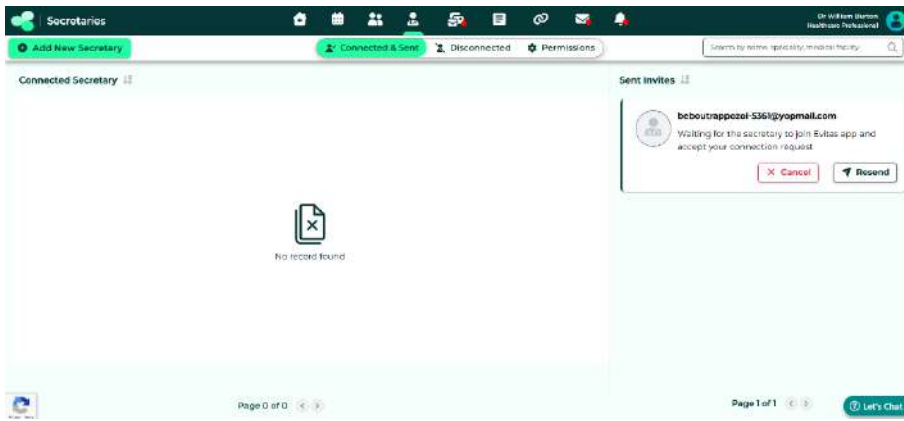


- You can **Choose Type of Secretary**, NHS or private.
- Add the **Secretary's Email Address**. This email address cannot be linked to anyone already on Evitas (HCP or Patient) so needs to be unique to the **Secretary**. If the email address is already registered an error message appears 'This user is already registered as an HCP or Patient on Evitas'.
- Add the Secretary's Landline Number if any.
- Add **the Secretary's Mobile Number**.
- You can **Grant Permissions** by clicking on the tab that allows them to **Access your Mailbox**.
- Click **Save**.

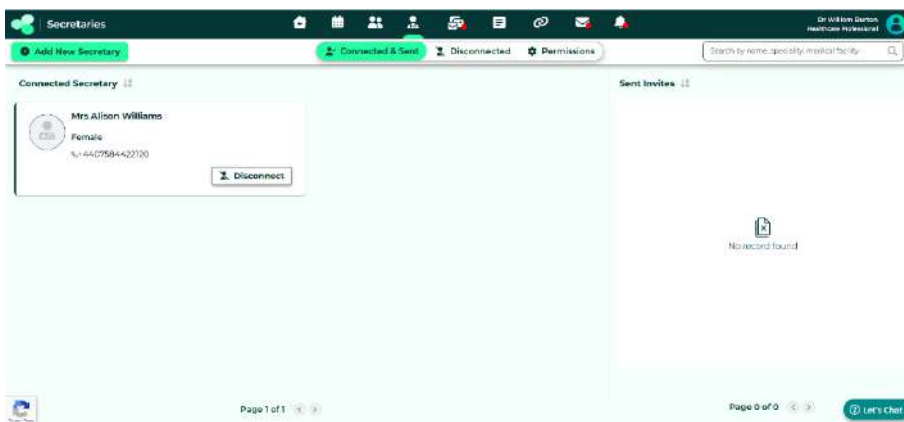
Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress.



You can view your **Sent Invitation** to your **Secretary** on this page.

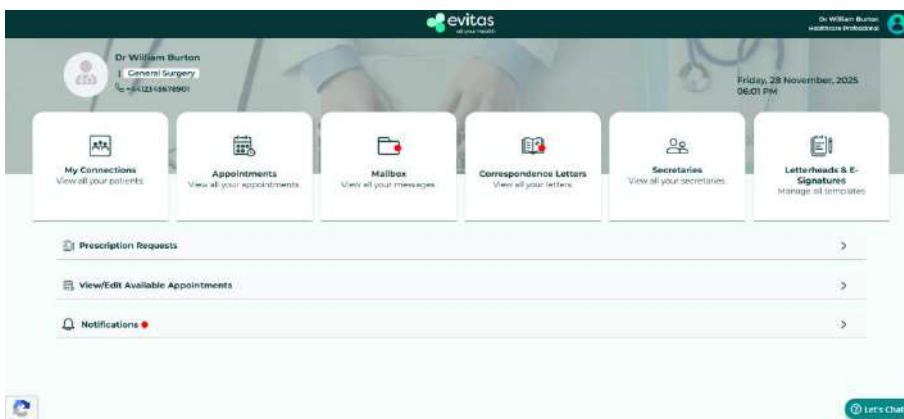


Your **Secretary** will receive an email inviting them to join Evitas as your **Secretary** (either NHS or Private). Once they have accepted your invite they need to register. Once registered they will appear as a **Connected Secretary**.

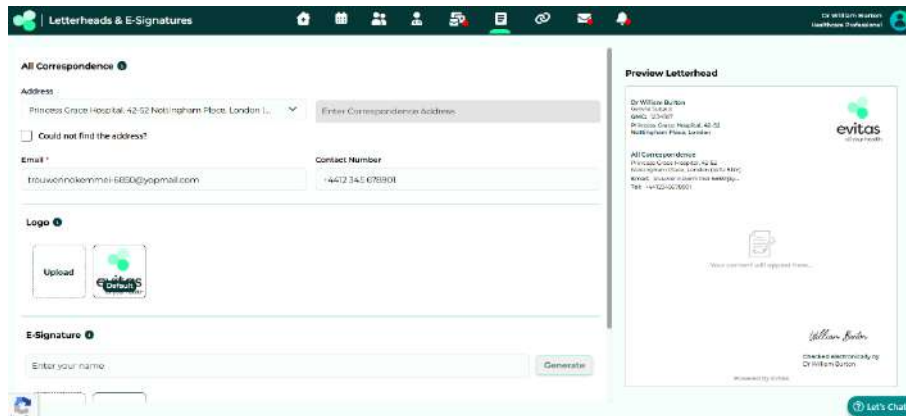


A **Secretary** can be disconnected at any time if they cease working for you. You can also view your permissions and **Secretaries** you have disconnected, by clicking on the appropriate boxes in the centre.

## Letterheads and E-Signatures

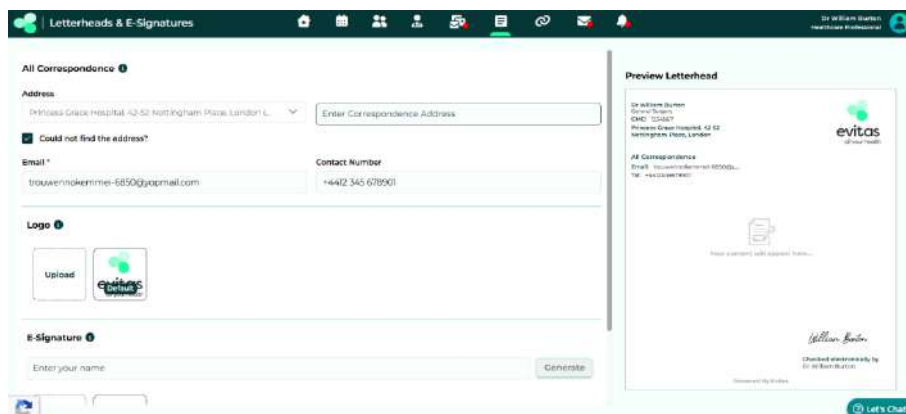


You can design your **Letter Template** and **Signature** by clicking on **Letterheads & E-Signatures** on your dashboard. The information that appears on the **Letterhead** is pulled from the profile you created when registering on Evitas. This opens the design tab and shows you a **Preview of the Letterhead** and how it will appear to the **Patient** or HCP.

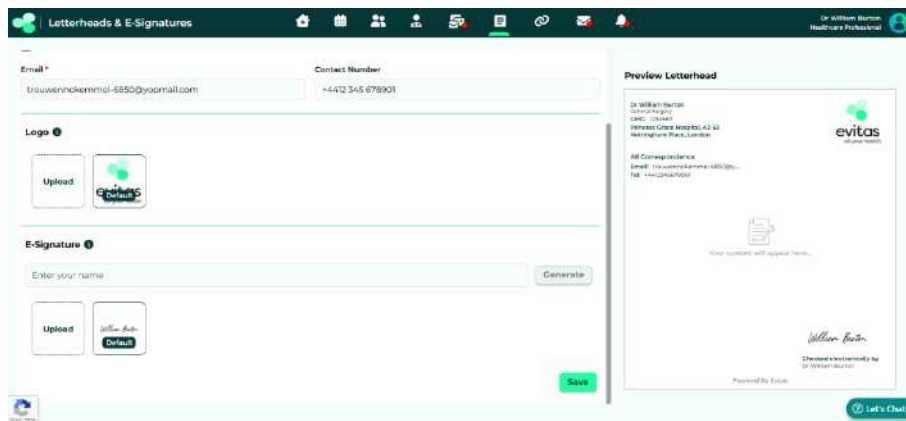


At any point, you can click on the (i) icon to read a brief guide on what to fill in the sections.

- If your **Correspondence Address** differs from the one you have in your profile. Click on **Could not find the address?** You can then manually add another address.



- If you would like to add your own logo to your **Letterhead** click on **Upload**. This will take you to your device where you can select a logo file upload. You can then set a default logo for your **Letterhead**.
- You can generate an **E-signature** by typing in your initials in the **E-signature** bar. You can also upload your signature from your computer. You can then set a default signature for your **Letterhead**.

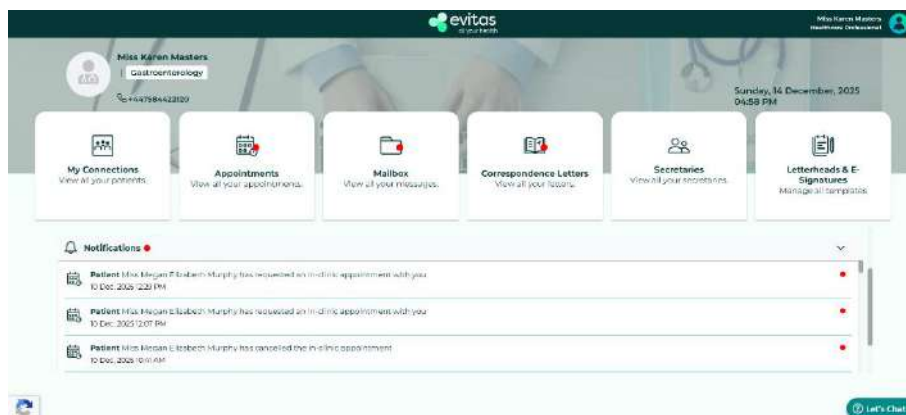


Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress.

## Notifications

The **Notifications** section provides you with a quick view of any notifications you have received for example, **Connection Invites** or **Appointment Requests**. Click on the arrow next to **Notifications** to expand the field and view further information.

Any **Notifications** that are unread will display a red dot.

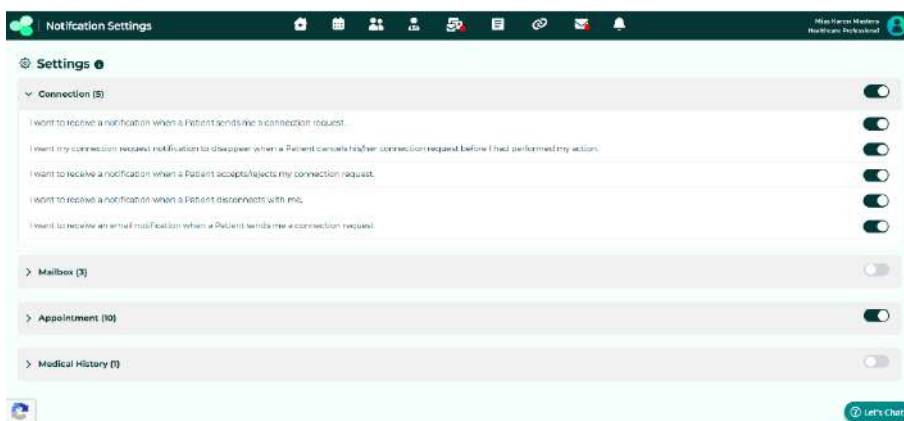


To view information on a **Notification** click on it and it will take you to the section of your dashboard relating to the notification. For example, if the **Notification** relates to a **Prescription Request** clicking on it will take you to your **Prescriptions** page.

You can customise your **Notification** settings within **Your Profile** (see Your Profile section). Click on **Settings** to view.



You can turn on/off any Notifications you wish/do not wish to receive.

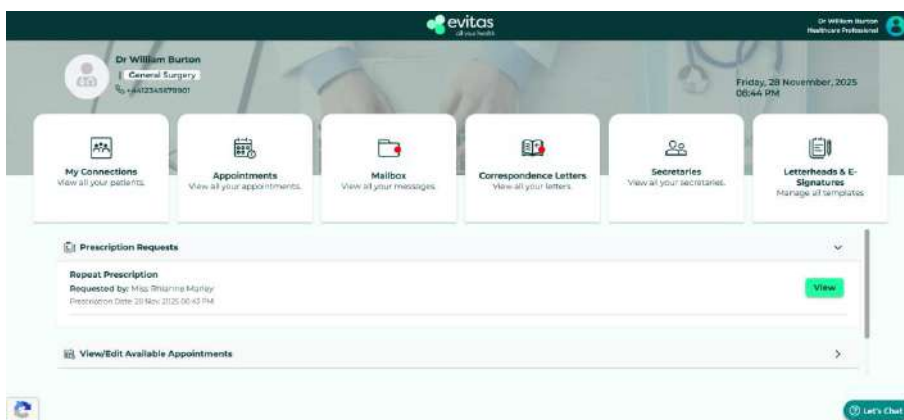


## Prescription Requests

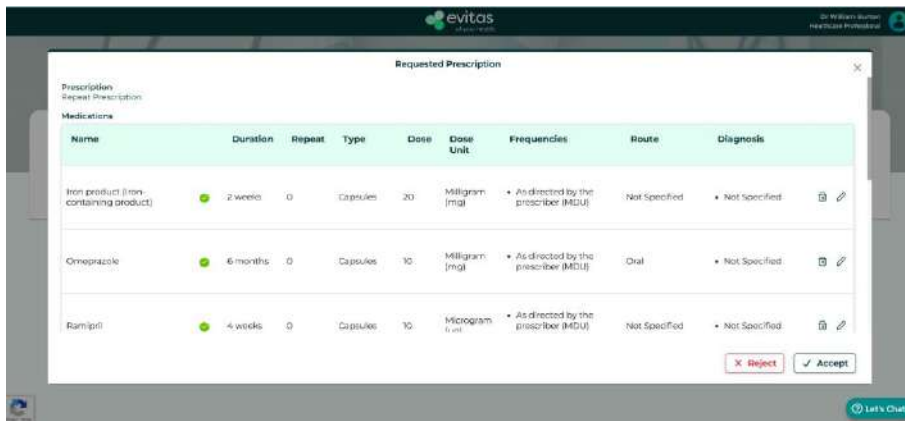
The **Prescription Request** shortcut on your home page allows you to view any **Incoming Requests** for prescriptions from **Patients** or pharmacies.

At any point, you can click on the (i) icon to read a brief guide on what to fill in the forms.

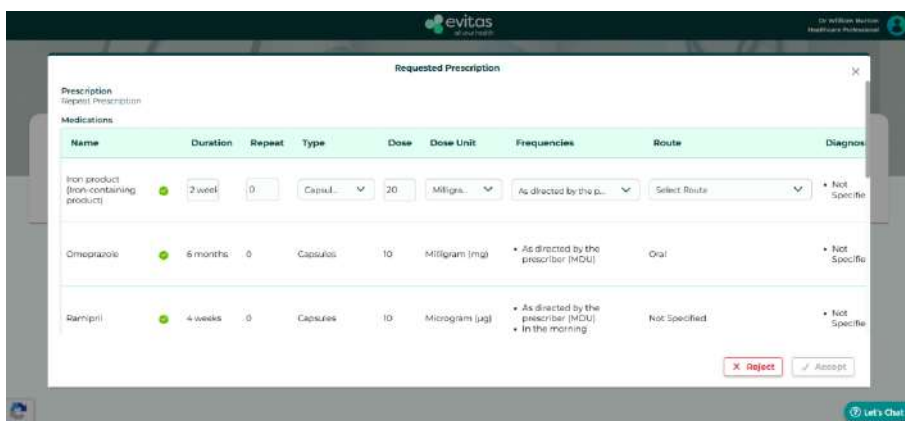
- Click on **Prescription Requests** and go through the requests that you may have received from **Patients** and pharmacies



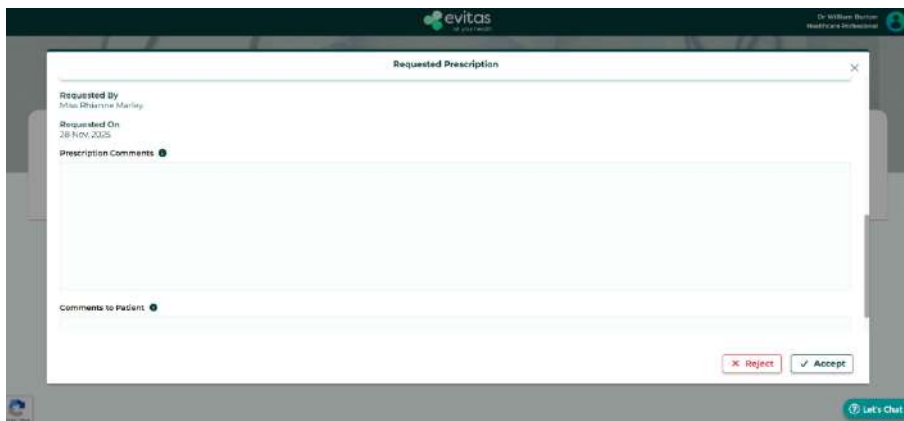
- Click on **View** to read the prescription requests.



- If you wish to change any elements of the prescription click on the pen icon for each **Medication** and make any changes to **Duration, Type, Dose, Dose Unit, Frequency** or **Route**.
- If you do not wish to prescribe a particular medication, click on the bin icon to delete and remove the **Medication** from the **Prescription**.



- Scroll down to add any comments related to the **Prescription** such as indications and any special instructions or any specific comments to the **Patient**.



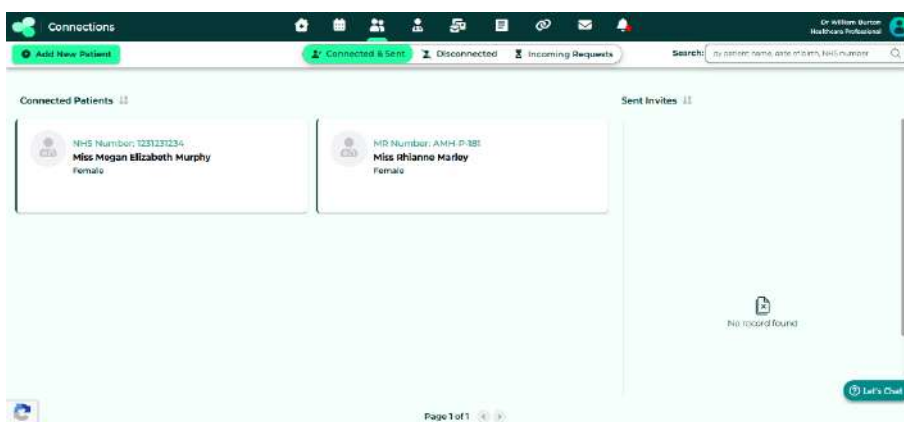
- Click **Accept** or **Reject** on the prescription request.

The patient will now receive a notification that their **Prescription Request** has been approved or rejected.

## Accessing a Patient's Medical Dashboard

Once you are connected to a **Patient** you can access their profile/dashboard where you are able to view/edit their medical history, upload referral letters, clinic letters, results and more.

- In the Connections section from the home page click on the **Patient** whose **Dashboard** you want to access.

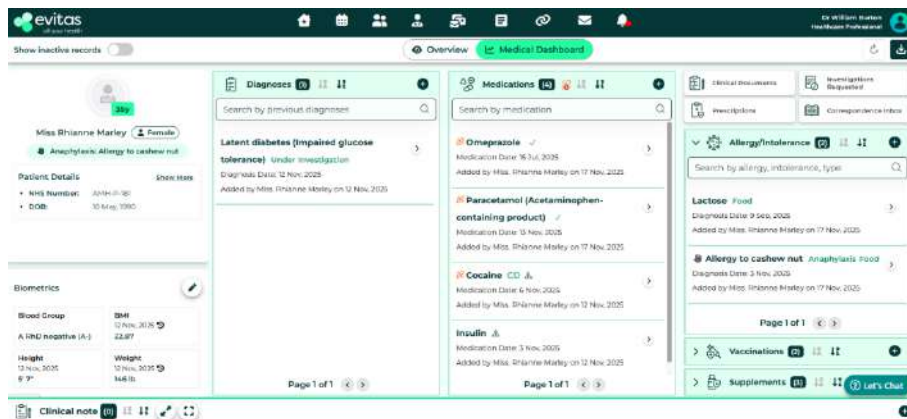


You will then see all of the **Patient's** information including the following information:

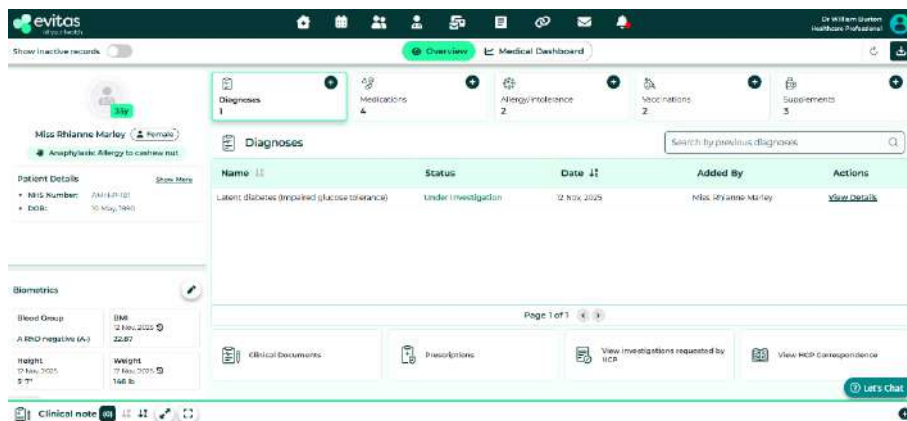
- Contact Details.
- Biometrics.
- Diagnoses
- Medications.
- Clinical Documents.
- Investigations.
- Prescriptions
- Correspondence Letters
- Allergies.
- Vaccinations.

- Supplements.
- Clinical Notes.

You have an option to look at the **Patient Overview Screen** or the **Patient Medical Dashboard**. To see the most comprehensive overview select the **Medical Dashboard**.



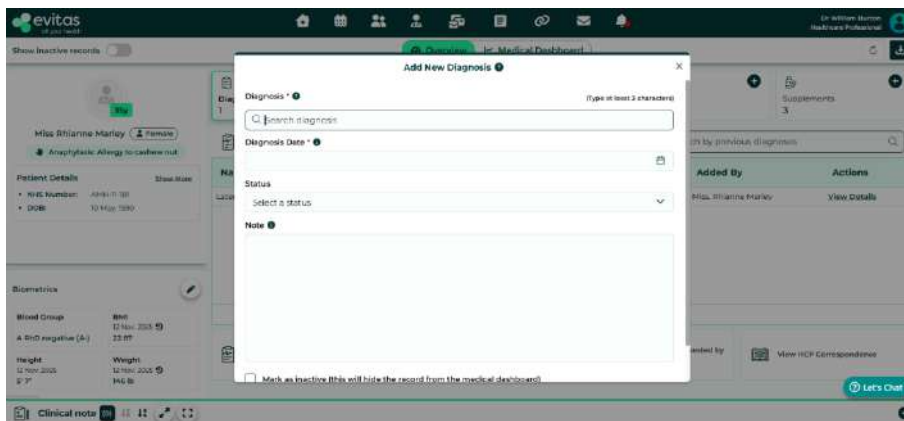
To add information to the **Patient's Dashboard**, you can use either the **Overview** or **Medical Dashboard**. However, the **Overview** is the preferred option.



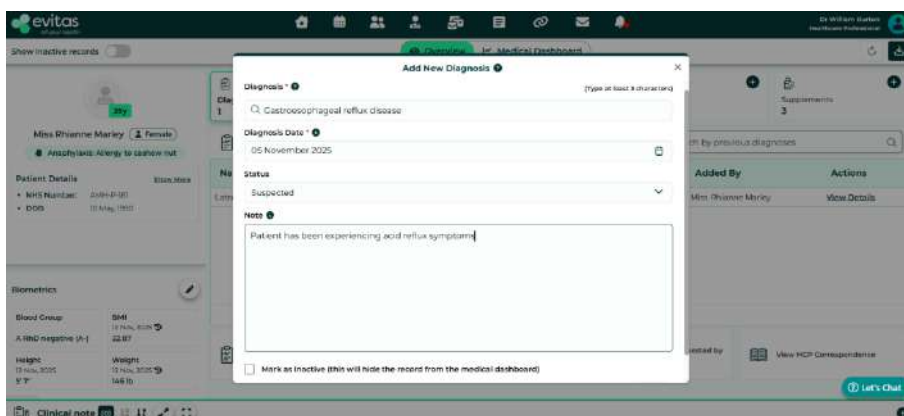
Whenever you, as an HCP, make any changes to a **Patient's Dashboard**, the **Patient** will receive a notification which may be an **Email** and/or an **SMS** along with an **In-Evitas Notification**.

## Diagnoses

- To add a **Diagnosis**, click the **(+) Add** sign in the Diagnoses box. This will open the **Add a New Diagnosis** window.



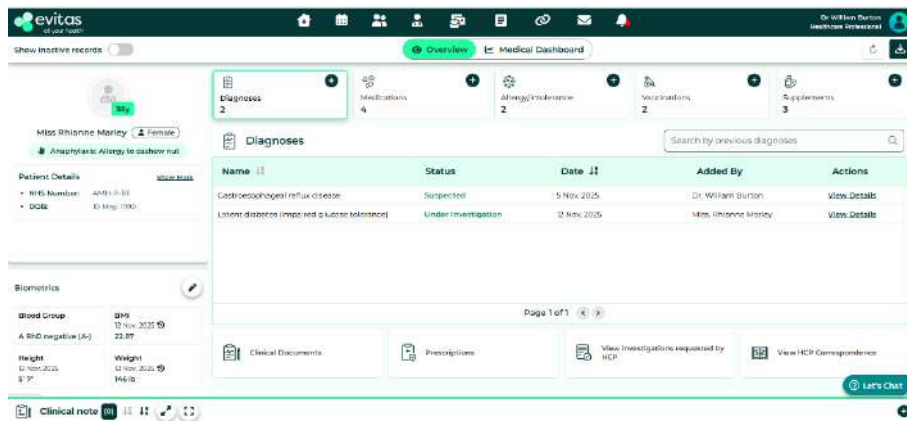
- Start to type the name of the **Diagnosis** in the **Diagnosis** field. As you type, the system will search the SNOMED database and provide a drop-down menu.
- Select the correct option and add in an exact or approximate **Date of Diagnosis**.
- In the **Status** field, select if the **Diagnosis** is **Confirmed**. You may also mark it as **Suspected** or **Under Investigation**.
- In the **Notes** field, provide any relevant information.



- Click **Save**

Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress.

You will now see the record in the **Diagnosis** section of the **Patient's Dashboard**. If you wish to look at the record, click on **View Details**.

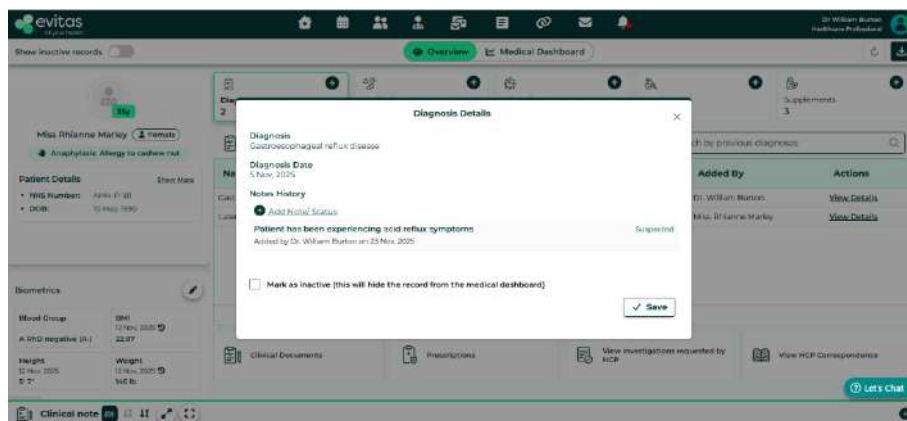


All details relating to the record you have created are visible including the **Diagnosis**, the **Status**, and the **Diagnosis Date**. You will be listed as the person who added the diagnosis and the date you added it so that it is clear to the Patient.

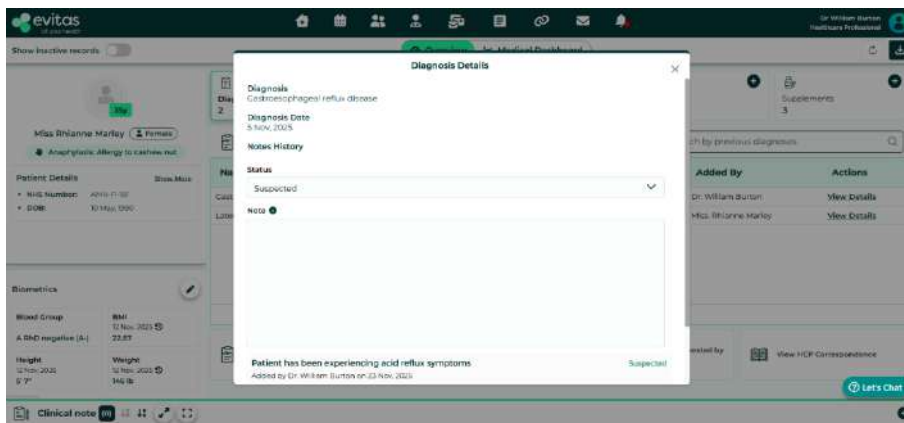
At any time, you can mark a **Diagnosis** as **Inactive** for example if it is no longer relevant to a patient's care. This will hide it from the patient's medical history but can still be seen when you click the **Inactive Records** icon at the top left corner of the screen. Inactive records will appear greyed out. When you mark a **Diagnosis** inactive, you will be prompted to add a note about why you are marking it inactive. If a diagnosis has been inactivated in error, you will need re-enter as a new record as inactivated records cannot be re-instated.

To add further **Diagnoses**, repeat the steps above.

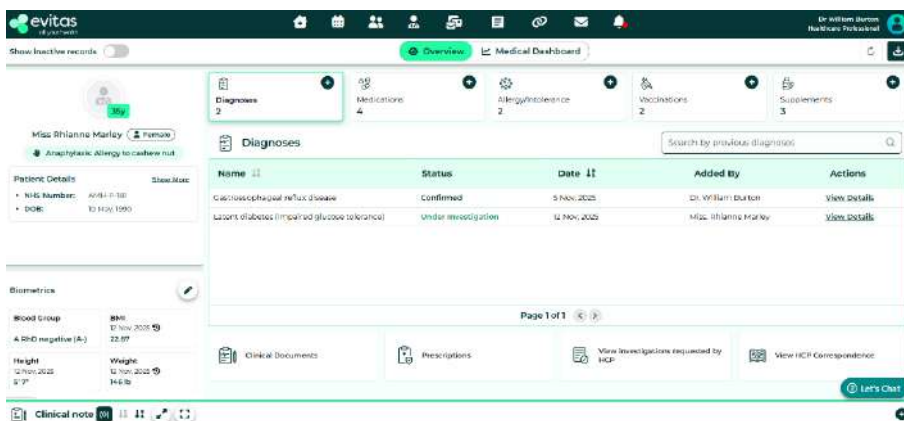
- If you wish to change the **Status** of a **Diagnosis** if an investigation is taking place or the **Diagnosis** has been confirmed click on **View Details** for that **Diagnosis**.



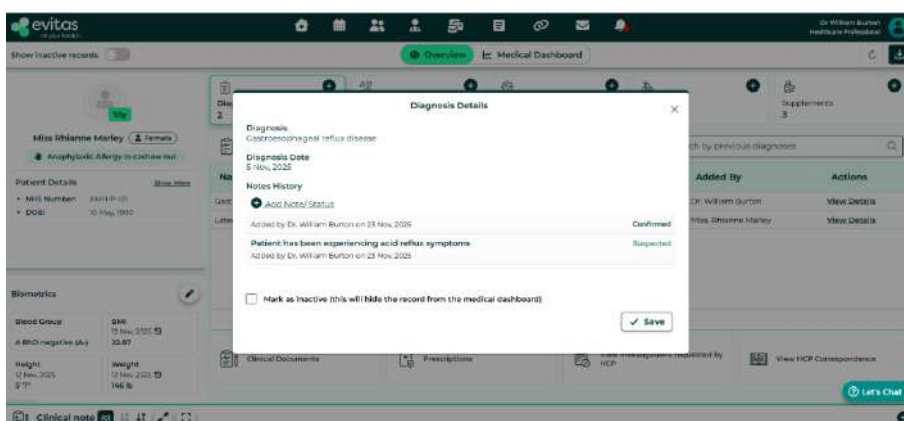
- Click **Add Note/Status**.



- Click on the **Status** drop-down arrow and select an updated **Status**. Add any relevant notes for this updated **Status** in the **Notes** field and click **Save**.
- You will see that the **Status** of the **Diagnosis** has been updated.



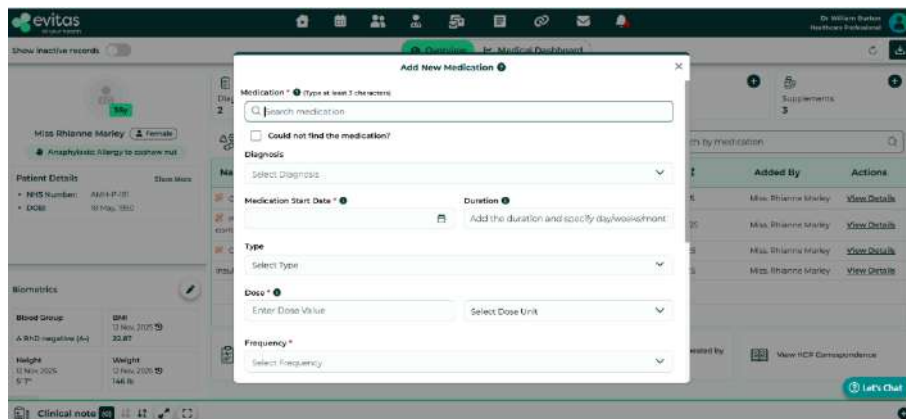
- Click on **View Details** to see the audit trail for this **Diagnosis**.



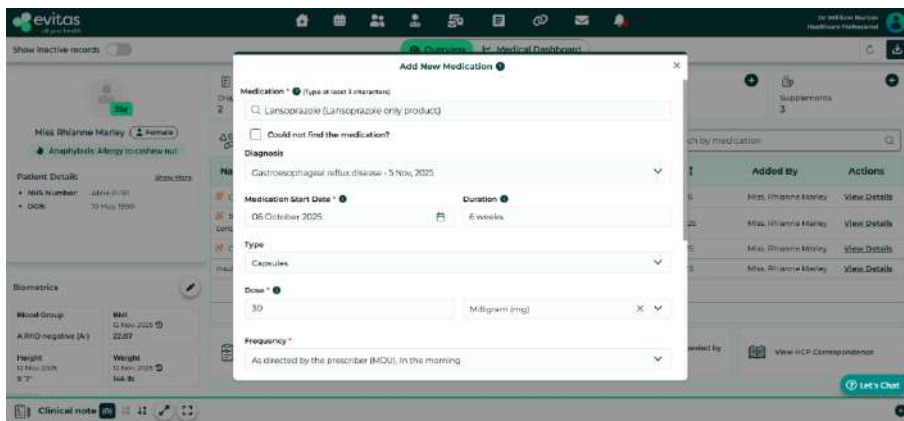
**Diagnoses** can be filtered either in date order or alphabetically using the arrows that can be found next to the **Name** and **Date** titles. If a patient has multiple diagnoses, you can search for a particular diagnosis using the **Search by Previous Diagnosis** bar.

## Medications

To add a **Medication**, click the **(+)** **Add New** sign in the **Medications** box. This will open the **Add a New Medication** window. At any point, you can view the descriptions and browse the useful links attached to the fields by clicking on the **(i)** icon.

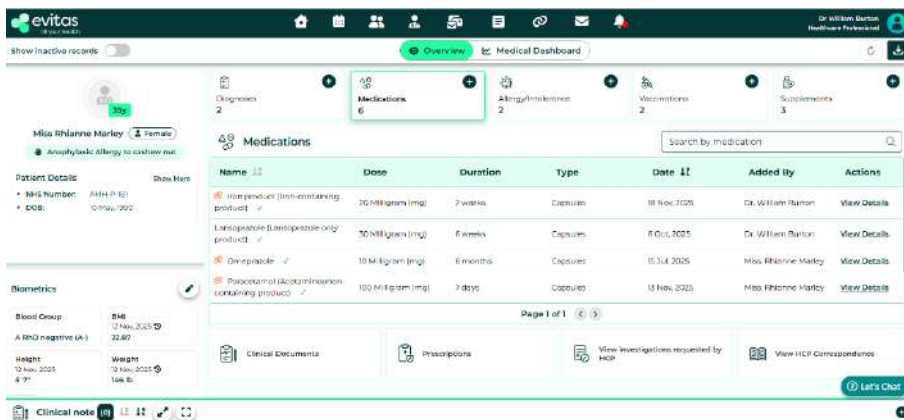


- Start to type the name of the medication in the **Medications** field. As you type, the system will search the database and provide a drop-down menu which only displays the first four options, use the right-hand scroll to search for other options.
- You can link the **Medication** to a particular diagnosis that has been previously added by you or your patient. Click on the drop-down menu in the **Diagnosis** field and select the appropriate option.
- Add in an exact or approximate **Date** when the patient started their medication. You can also choose to add the **Duration**.
- In the **Type** field, click on the drop-down menu and select the appropriate type of medication.
- Type in the **Dose of Medication** and choose the appropriate **Dose Unit** of the medication by selecting from the drop-down menu.
- Select the appropriate **Frequency** of medication by clicking on the drop-down menu in the **Frequency** field.
- Select the appropriate **Route** by clicking on the drop-down menu
- Add **Notes** if you have any relevant information attached to the patient's medication



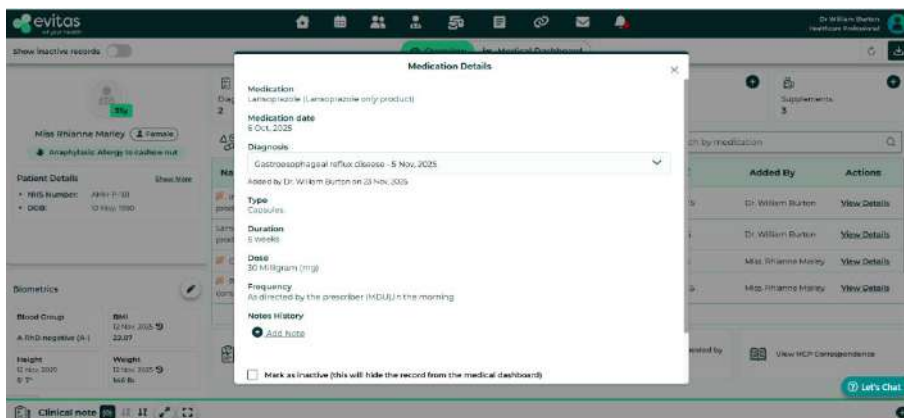
- Click **Save**.

You will now see the **Medication** record you created along with your details in the **Medications** section of the patient's **Medical Dashboard**. If you wish to look at the record, click on **View Details**.



At any time, you can mark a **Medication** as **Inactive** for example if it is no longer relevant to a patient's care. This will hide it from the patient's medical history but can still be seen when you click the **Inactive Records** icon at the top left corner of the screen. **Inactive** records will appear greyed out. When you mark a **Medication** inactive, you will be prompted to add a note about why you are marking it inactive. If a **Medication** has been inactivated in error or you have been prescribed it again, you will need re-enter as a new record as inactivated records cannot be re-instated.

Failure to complete the fields marked with an asterisk (\*) will require you to fill the fields again before you can progress.

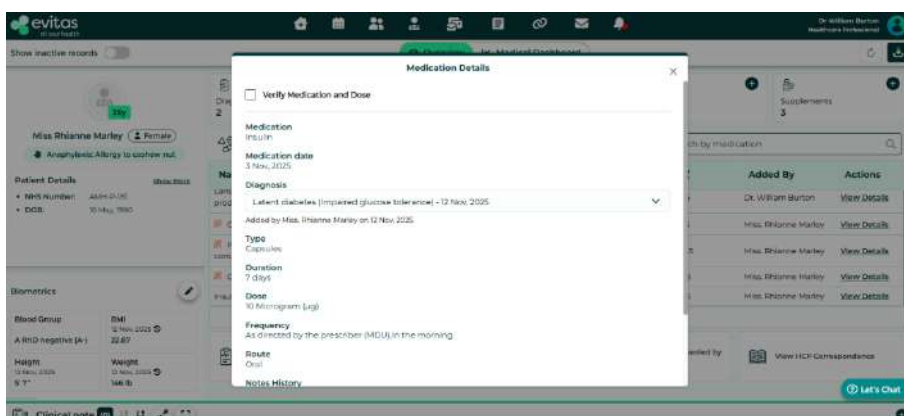


To add more **Medication(s)**, click on **Add New** and repeat the steps above.

The patient's **Medications** can be filtered either in date order or alphabetically using the arrows that can be found next to the **Name** and **Date** titles. You can also type in the medication name in the **Search by Medication** search field.

When a **Medication** has been added a green tick icon will be displayed with a hover message stating 'Verified Medicine' which indicates the **Medication** has been verified by an HCP. **Medications** that are controlled drugs have an icon CD next to the name of the medication. If you hover over this icon it states 'Controlled Drug'.

The system has been designed to ensure that if a patient adds a **Medication** to their dashboard that this is flagged as Non Verified until such time that you or another HCP actively verifies it. To verify a **Medication** on the patient's dashboard click **View Details** and check the **Verify Medication and Dose** box.



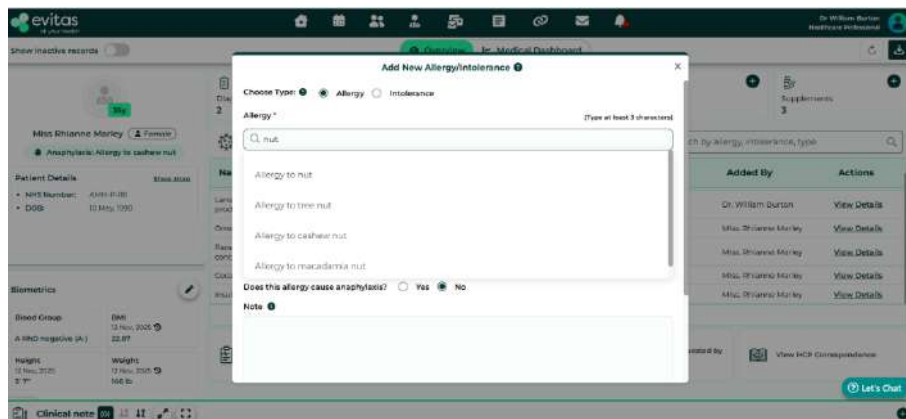
If a **Medication** is not linked a **Diagnosis** a red icon will appear. If you hover over this icon a message is displayed stating 'Link with diagnosis is missing'.

**Medications** that are controlled drugs have an icon next to the name of the medication. If you hover over this icon it states 'Controlled Drug'.

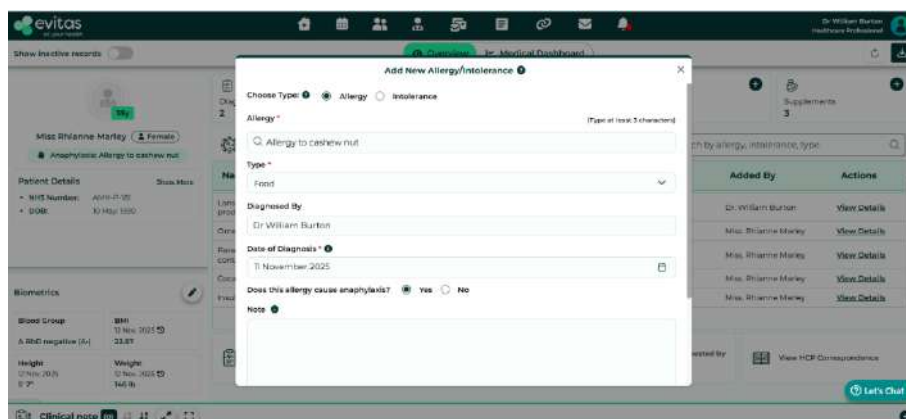
## Allergies/Intolerances

To add an **Allergy** or **Intolerance**, click the **(+) Add New** in the **Allergy/Intolerance** box. This will open the **Add New Allergy/Intolerance** window. At any point, you can view the descriptions and browse the useful links attached to the fields by clicking on the **(i)** icon.

- Select whether you wish to add an **Allergy** or an **Intolerance** by checking the appropriate box under **Choose Type**.
- Start to type the name of the allergy in the **Allergy** field. As you type, the system will search the database and provide a drop-down menu.



- Select the correct **Allergy** and then choose the **Type of Allergy**.
- You can add your records name if you diagnosed the patient with this allergy in the **Diagnosed By** section.
- Add the **Date** of the allergy diagnosis by selecting from the calendar.
- Confirm whether the **Allergy** causes anaphylaxis.

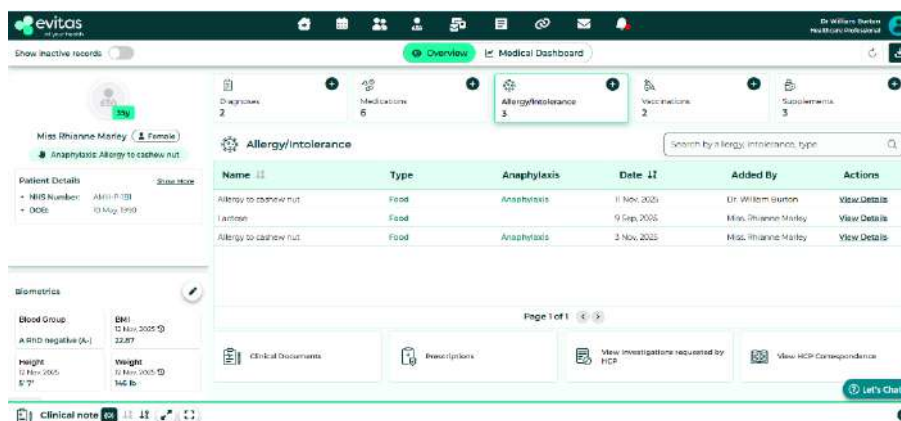


- In the **Notes** field, provide a basic description of the **Allergy** and any relevant information.
- The record can be marked as inactive, this will hide it from the patient's medical history.
- Click **Save**.

Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress

You will now see the record in the **Allergy/Intolerance** section of the **Patient's Dashboard**. If you wish to look at the record, click on **View Details**.

In this example, as the allergy has caused life-threatening anaphylaxis, it has been added to the **Patient's Medical History** on the left-hand side of their **Dashboard**.



- You can now add an **Intolerance** (if any) by following the same steps as above.

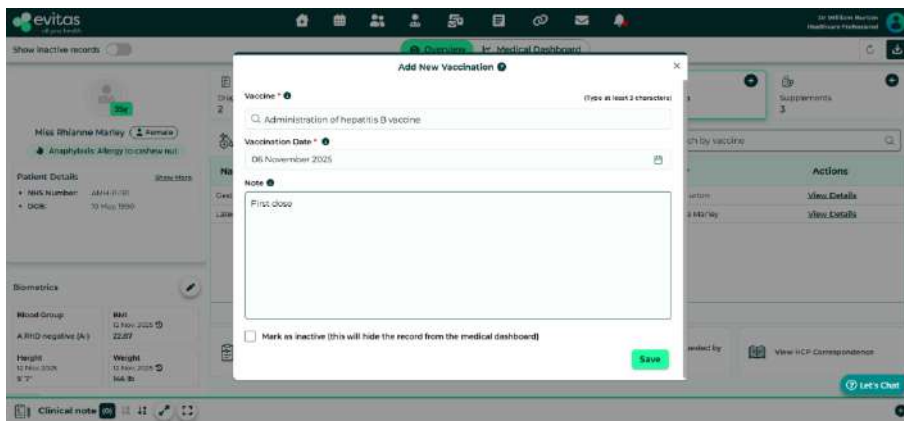
At any time, you can mark an **Allergy/Intolerance** as **Inactive** for example if it is no longer relevant to a patient's care. This will hide it from the patient's medical history but can still be seen when you click the **Inactive Records** icon at the top left corner of the screen. **Inactive Records** will appear greyed out. When you mark an **Allergy/Intolerance** as inactive, you will be prompted to add a note about why you are marking it inactive. If an **Allergy/Intolerance** has been inactivated in error, you will need re-enter as a new record as inactivated records cannot be re-instated.

**Allergies/Intolerance** can be filtered either in date order or alphabetically using the arrows next to the **Name** and **Date** titles. You can search the **Allergies/Intolerances** using the search field.

## Vaccinations

To add a **Vaccination**, click the **(+) Add New** sign in the **Vaccinations** box. This will open the **Add New Vaccination** window. At any point, you can view the descriptions and browse the useful links attached to the fields by clicking on the **(i)** icon.

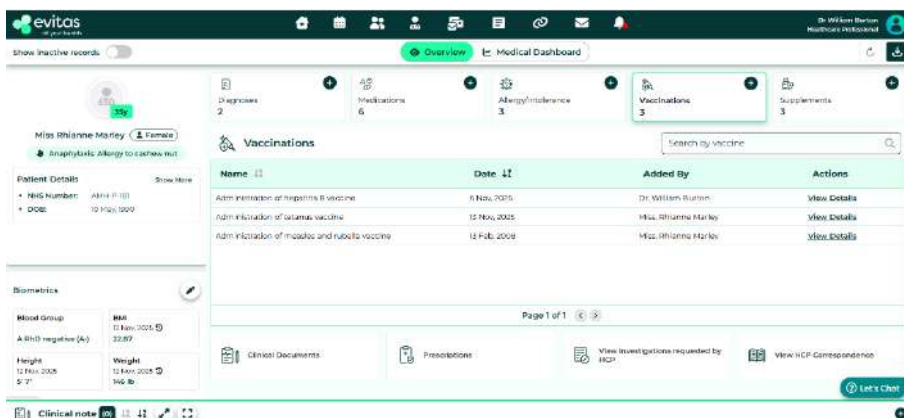
- Start to type the name of the **Vaccination** in the **Vaccination** field. As you type, the system will search the database and provide a drop-down menu.
- Select the correct **Vaccination** and **Date** or approximate date of vaccination. In the **Notes** field, provide any other relevant information relating to the vaccination.
- You can add any relevant notes attached to the **Vaccination**.



- The record can be marked as inactive, this will hide it from the patient’s medical history.
- Click **Save**.

Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress.

You will now see the **Vaccination** in the **Vaccinations** section of the patient’s **Dashboard**. If you wish to look at the record, click on **View Details**.



At any time, you can mark a **Vaccination** as **Inactive** for example if it is no longer relevant to a patient’s care. This will hide it from the patient’s medical history but can still be seen when you click the **Inactive Records** icon at the top left corner of the screen. **Inactive Records** will appear greyed out. When you mark a **Vaccination** inactive, you will be prompted to add a note about why you are marking it inactive. If a **Vaccination** has been inactivated in error, you will need re-enter as a new record as inactivated records cannot be re-instated.

To add more **Vaccinations**, click on the **Add New** button in the **Vaccinations** box and repeat the steps above.

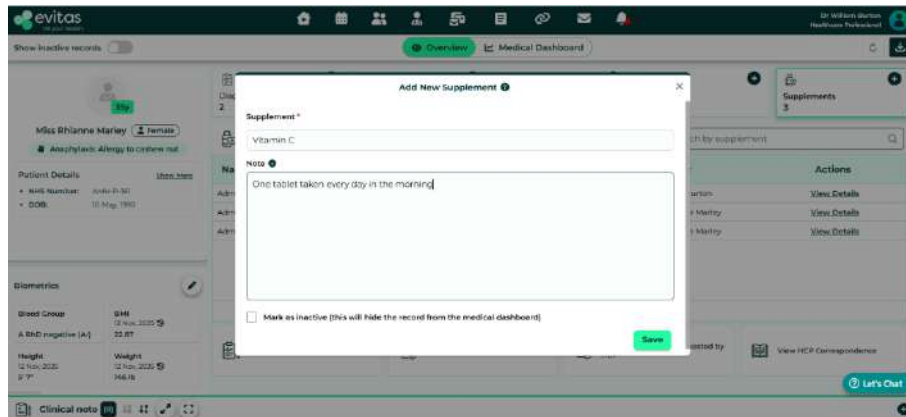
The **Vaccinations** can be filtered either in date order or alphabetically using the **Name** and **Date** titles.

You can search vaccinations using the **Search** field, you can search by vaccine.

## Supplements

To add a **Supplement** such as a vitamin, nutrient drink or herbal medicine, click the **(+) Add New** sign in the **Supplements** box. This will open the **Add a New Supplement** window. At any point, you can view the descriptions and browse the useful links attached to the fields by clicking on the **(i)** icon.

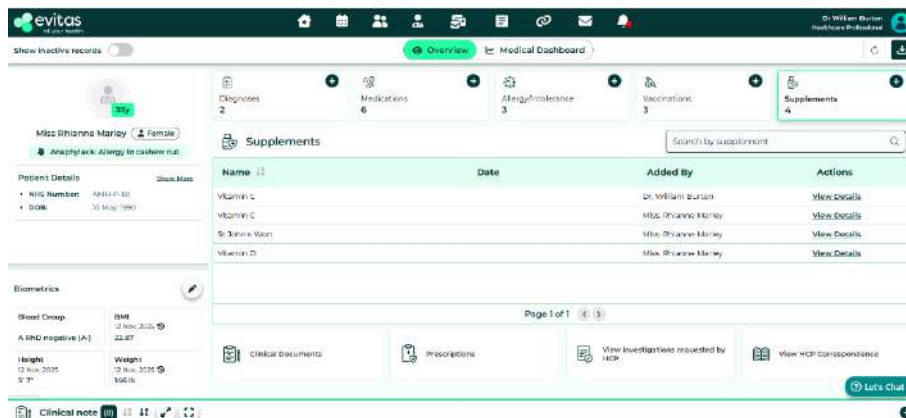
- Type the name of the **Supplement** into the **Supplement** field and add any relevant information into the **Notes** field.



- Click **Save**.

Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress

You will now see the **Supplement** in the **Supplements** section of the patient's **Dashboard**. If you wish to look at the record, click on **View Details**.



Name	Date	Added by	Actions
Vitamin C		Dr. William Burton	View Details
Vitamin C		Miss Rhianne Marley	View Details
St. John's Wort		Miss Rhianne Marley	View Details
Vitamin D		Miss Rhianne Marley	View Details

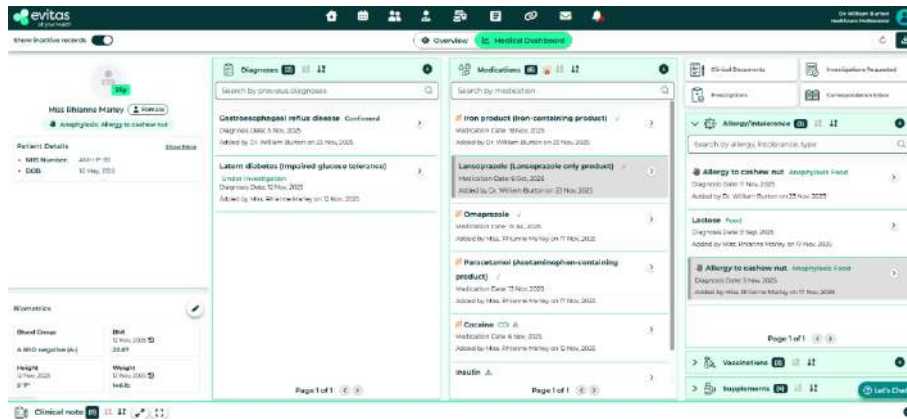
At any time, you can mark a **Vaccination** as **Inactive** for example if it is no longer relevant to a patient's care. This will hide it from the patient's medical history but can still be seen when you click the **Inactive Records** icon at the top left corner of the screen. **Inactive Records** will appear greyed out. When you mark a **Vaccination** inactive, you will be prompted to add a note about why you are marking it inactive. If a **Vaccination** has been inactivated in error, you will need re-enter as a new record as inactivated records cannot be re-instated.

To add more **Supplements**, repeat the steps above.

**Supplements** can be filtered either in date order or alphabetically using the arrows that can be found next to **Name** and **Date** titles. You can search **Supplements** using the **Search** field.

## Inactive Records

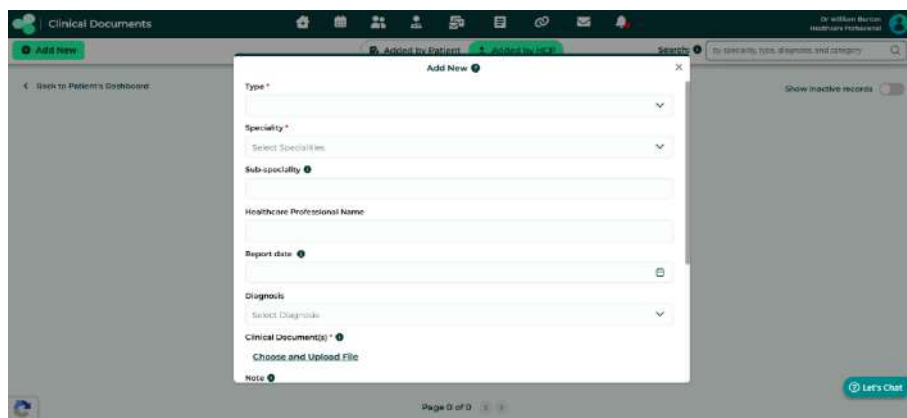
At any time you can view **Inactive Records** by clicking on the **Inactive Records** button on the upper left side of the patient's **Dashboard**. These will appear in all relevant sections greyed out.



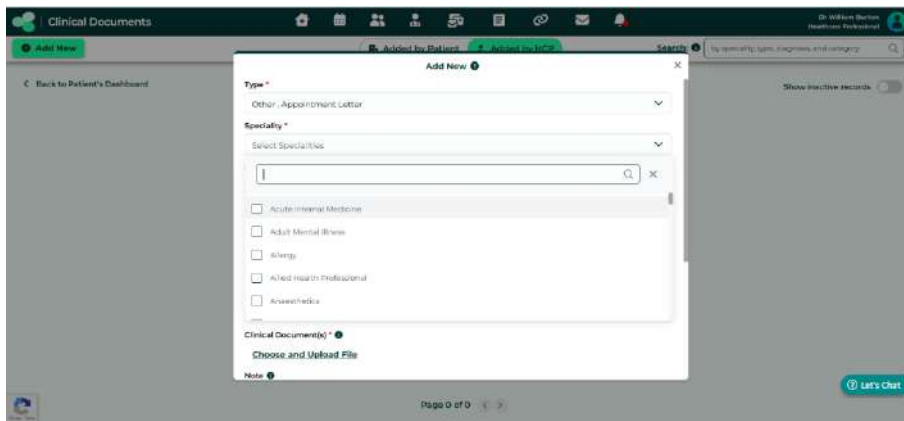
## Clinical Documents

To add **Clinical Reports, Referrals, Letters, Test Results**, etc, click **Clinical Documents** box. This will open the **Clinical Documents** window. You can view a short description and explanation of each section by clicking on the (i) icon. You can also view the existing documents by clicking on **Added by Patient** or **Added by HCP**.

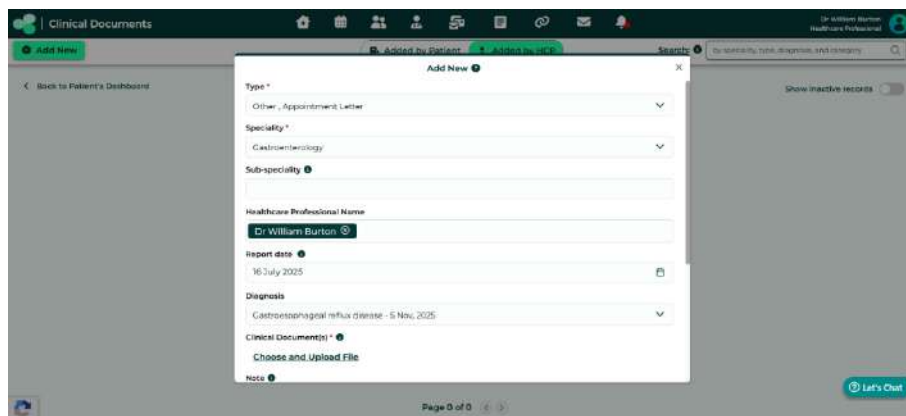
- Click on (+) **Add New**.



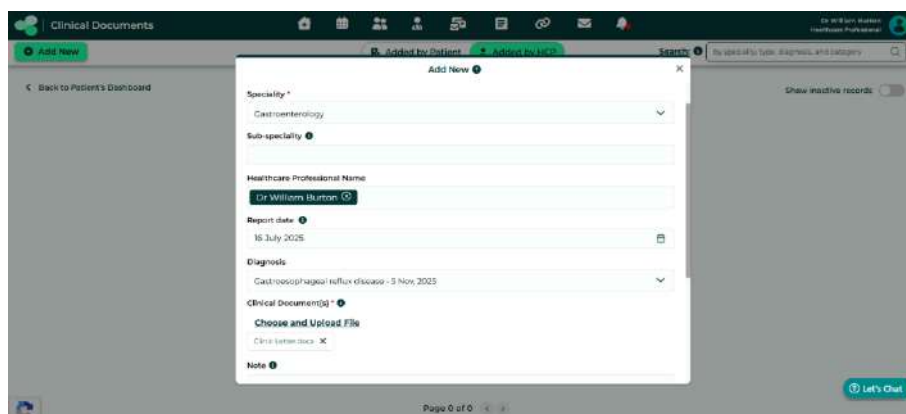
- Click on the arrow in the **Type** field to select the **Clinical Document** you want to add/attach. As you type the system will search the database and provide a drop-down menu with options. Select the most appropriate option. If you are unable to find a suitable type, check the **Other** box.
- Select the **Specialty** for the **Clinical Document**.



- Select **Sub-specialty**, if any.
- Add your name as the **Healthcare Professional**.
- Select the **Date** of the document being added.
- Select the **Diagnosis** relevant to the document, if any from the drop-down menu.



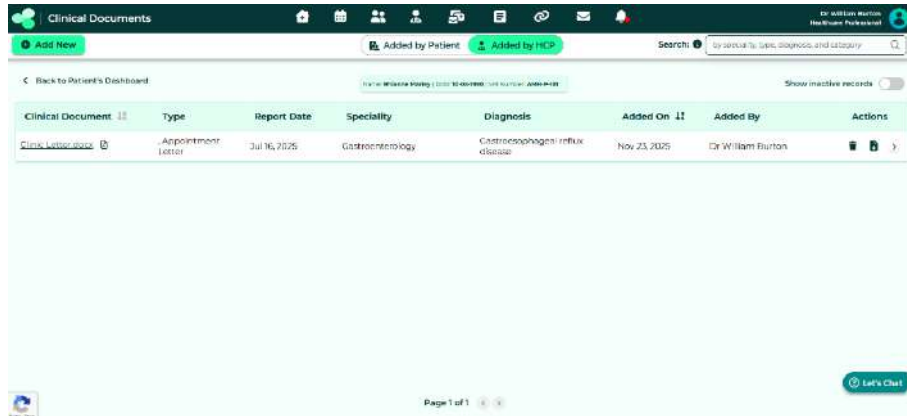
- You now have the option to upload a file. Click on **Choose and Upload File**. This will take you to your computer where you can select the file that you wish to upload.
- Add in any **Notes** that you feel are relevant to the document you are uploading such as a summary or description of the document being uploaded or an explanation of the test result being uploaded.



- Click **Save**

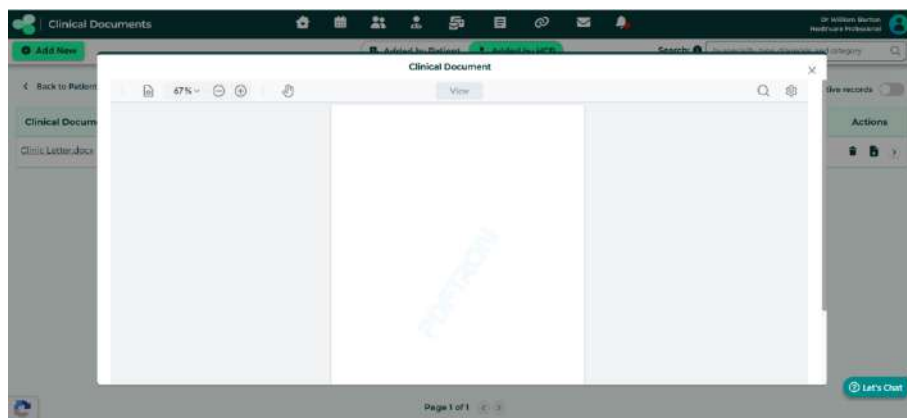
Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress.

You will now see the record you have created in the **Clinical Documents** section of the **Patient's Dashboard**. All details relating to the record you have created are visible, including the title of the document attached, the report/document date, your name (as the HCP), the clinical specialty, and the type of document.

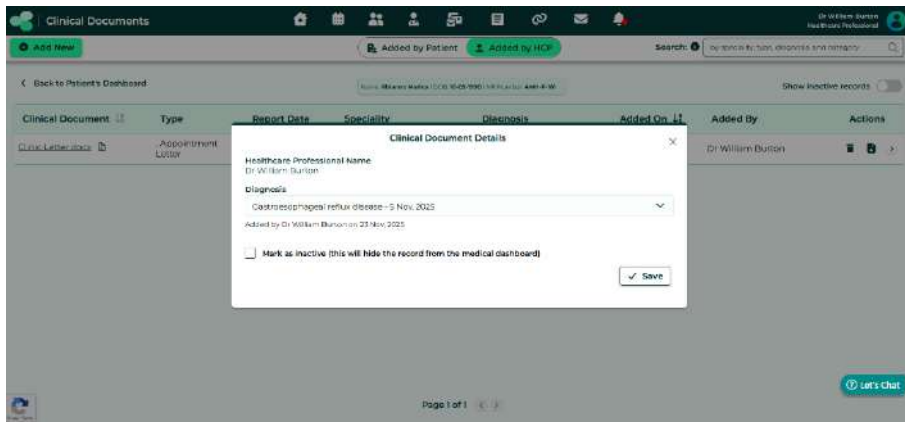


You will be detailed as the person who added the document and the date you added it so that it is clear to the **Patient**.

- If you wish to view the document, click on the underlined document to view on screen or the PDF icon to download to your device.
- You can edit the viewing preferences by clicking on the **Settings** cog icon in view mode. You can also magnify the text or search for keywords in this mode.



- You can also view and edit **Medical Record Details** by clicking on the arrow next to the record.
- You can delete the record by clicking on the Bin icon.

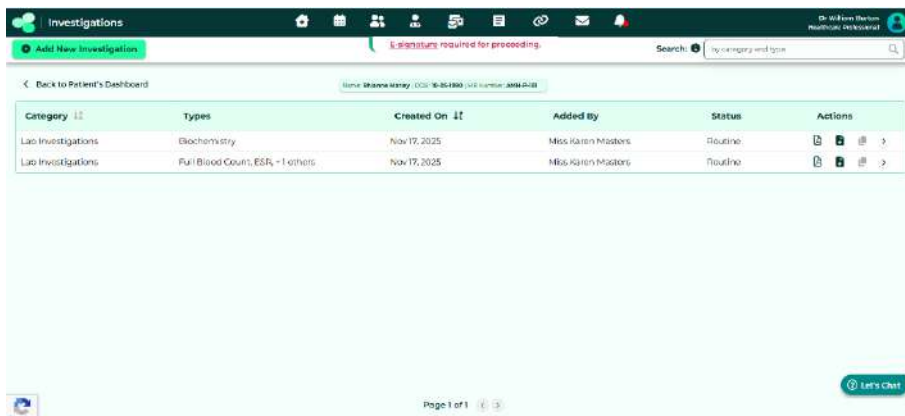


At any time, you can mark a **Clinical Document** as **Inactive** for example if it is no longer relevant to a patient’s care. This will hide it from the patient’s medical history but can still be seen when you click the **Inactive Records** icon at the top right corner of the screen. **Inactive Records** will appear greyed out. When you mark a **Clinical Document** inactive, you will be prompted to add a note about why you are marking it inactive.

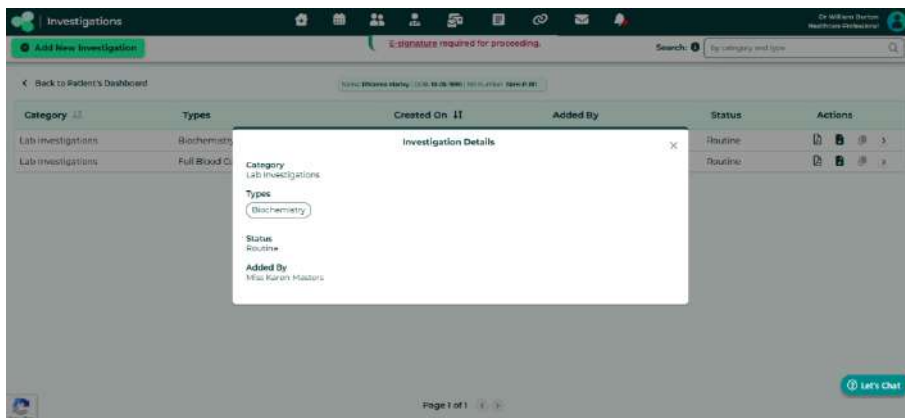
To add further documentation (referrals, clinical letters, tests, results etc), repeat the steps above.

## Investigations

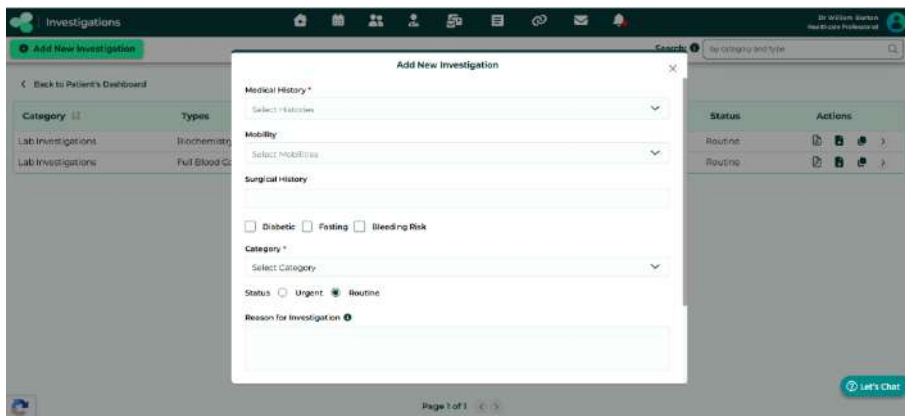
To view or add an **Investigation**, click **View Investigations Requested by HCP**.



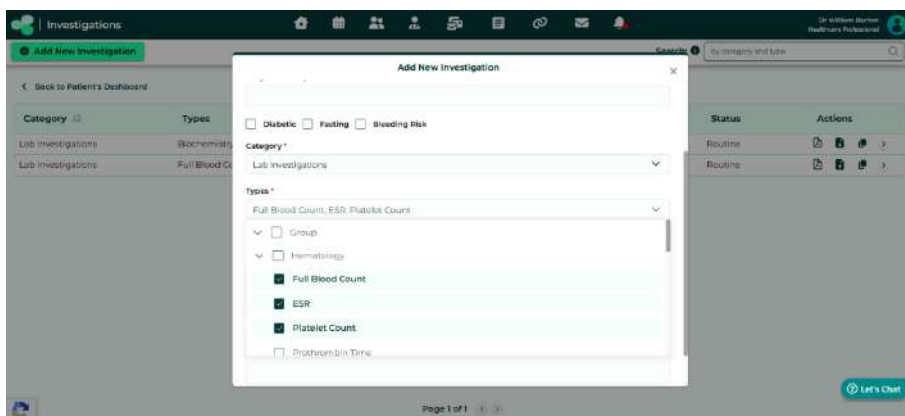
All **Investigations** that have been requested will be visible on screen. They can be filtered by **Category** and **Date**. **Investigations** can be viewed on screen by clicking the PDF icon or downloaded to your device using the **Download** icon. To view the **Investigation Details** click on the **Actions** arrow.



- Click on **Add New Investigation**.



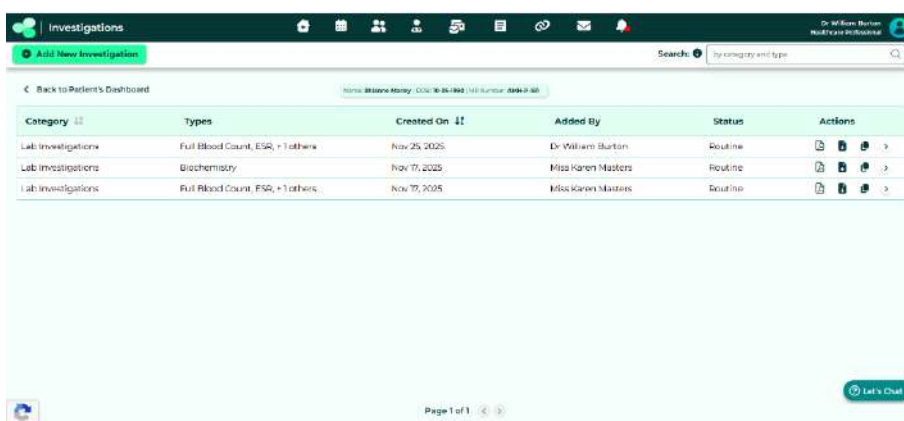
- Click on the arrow under the **Medical History** field. You will find a drop-down menu with options. Select the most appropriate option.
- Select the **Mobility** level of the patient if appropriate.
- Select the appropriate **Surgical History** (if any) from the drop-down menu.
- Tick the boxes if the patient is Diabetic, Fasting or a Bleeding risk.
- Select the category of **Investigations** from the **Category** menu. If you cannot find the **Type** of investigation then check **Other Types** and fill it in manually.



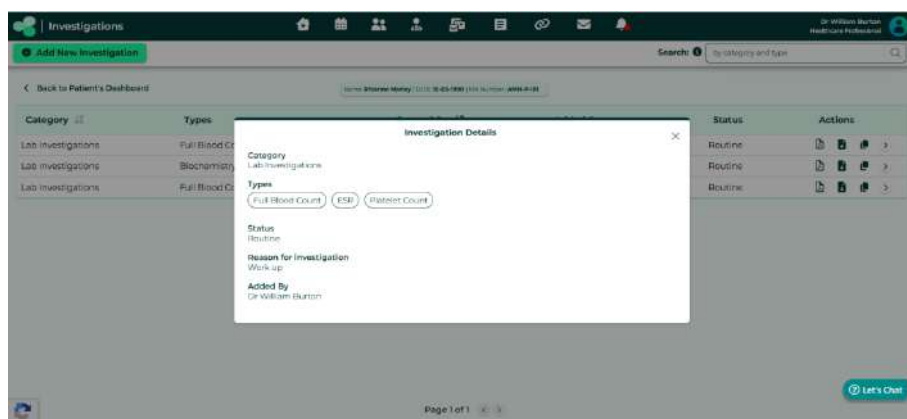
- You can choose the **Status** if the **Investigation** is **Urgent** or **Routine**.
- Write in the **Reason for Investigation**.
- Write in **Additional Instructions**.
- Click **Save**

Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress.

You can now see your **Investigation Request** in the **Investigations** tab.

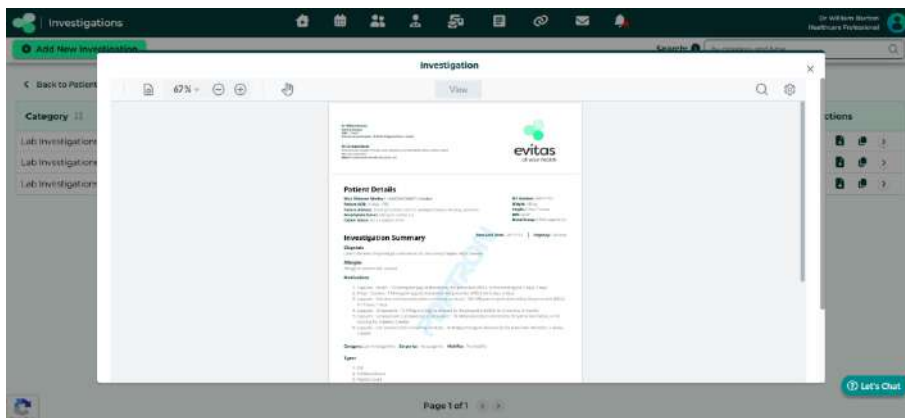


- Click on the arrow to view the **Investigation Details**.



By clicking on the various icons, in the actions section, you can interact with your **Investigations** in the following ways:

- View the PDF of the **Investigation** online by clicking on the PDF Acrobat reader icon. You can manage viewing preferences by clicking on the settings cog and the magnify icon. You can also search for keywords.



- You can download the **Investigation** for your records by clicking on the download icon.
- You can clone the **Investigation** by clicking on the green clone icon. This will open a pop up for **Add New Investigation** with all the fields populated with the same information as previously. You can edit any information required and then click **Save**. An new **Investigation** will be created, you will need to refresh your screen to view.

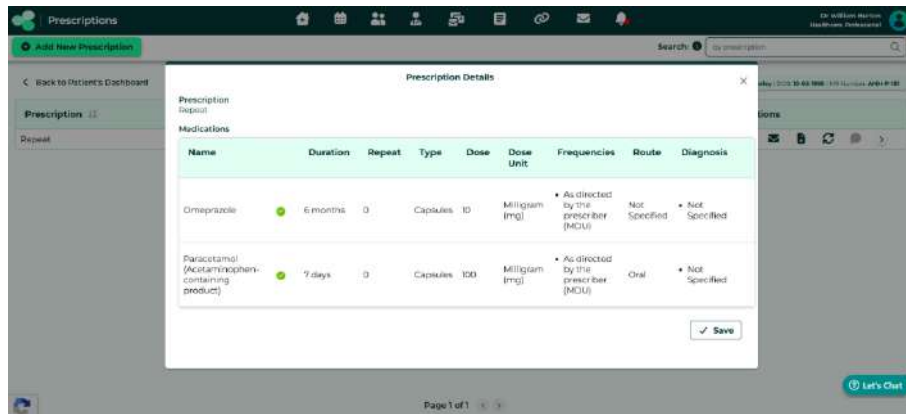
Category	Types	Created On	Added By	Status	Actions
Lab Investigations	Full Blood Count, ESR, + 1 others	Nov 25, 2025	Dr William Burton	Routine	[Download] [Clone] [Refresh] [More]
Lab Investigations	Full Blood Count, ESR, + 1 others	Nov 25, 2025	Dr William Burton	Routine	[Download] [Clone] [Refresh] [More]
Lab Investigations	Biochemistry	Nov 17, 2025	Miss Karen Meders	Routine	[Download] [Clone] [Refresh] [More]
Lab Investigations	Full Blood Count, ESR, + 1 others	Nov 17, 2025	Miss Karen Meders	Routine	[Download] [Clone] [Refresh] [More]

## Prescriptions

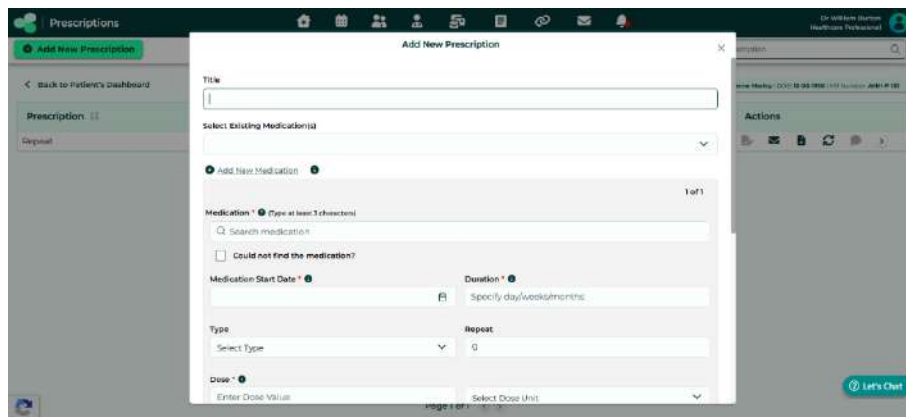
To view or create a new prescription click on the **Prescriptions** box. All **Prescriptions** for that **Patient** will be visible on screen.

Prescription	Added By	Status	Prescribed On	Actions
Repeat	Miss Rhianne Marley	Prescribed	Nov 25, 2025	[Download] [Clone] [Refresh] [More]

They can be filtered by **Prescription**, by **Date Prescribed** or you can search. **Prescriptions** can be downloaded to your device using the **Download** icon or to view the **Prescription Details** click on the **Actions** arrow.



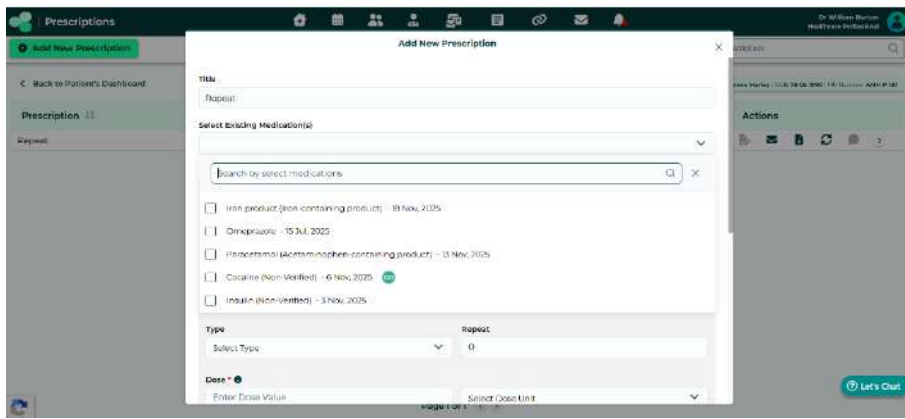
- To add a new **Prescription** click on **(+) Add New Prescription**. This will open the **Add New Prescription** window. At an point, you can view the descriptions and browse the useful links attached to the fields by clicking on the (i) icon.



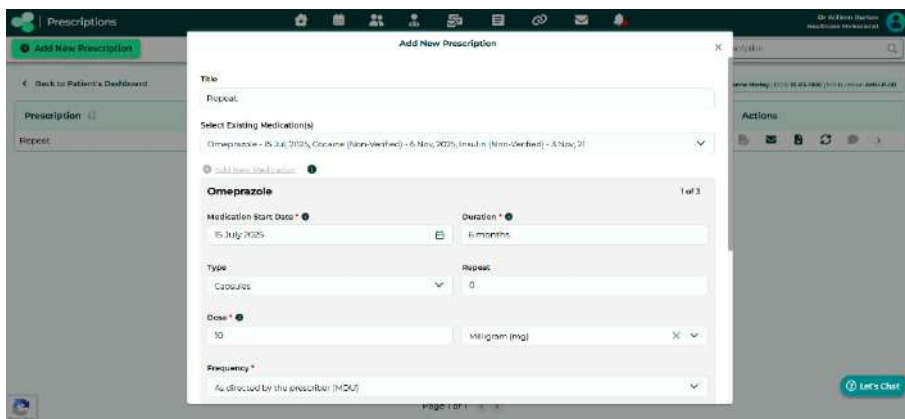
- Add a **Title** to the **Prescription**.
- There are then two options available to you. You can select an existing **Medication** from **the Patient's Dashboard** or add a **New Medication**.

### Adding an Existing Medication to a Prescription

- For an existing medication, you can select the medication you are wanting to prescribe by choosing from the drop-down menu in the **Select Existing Medication** field.

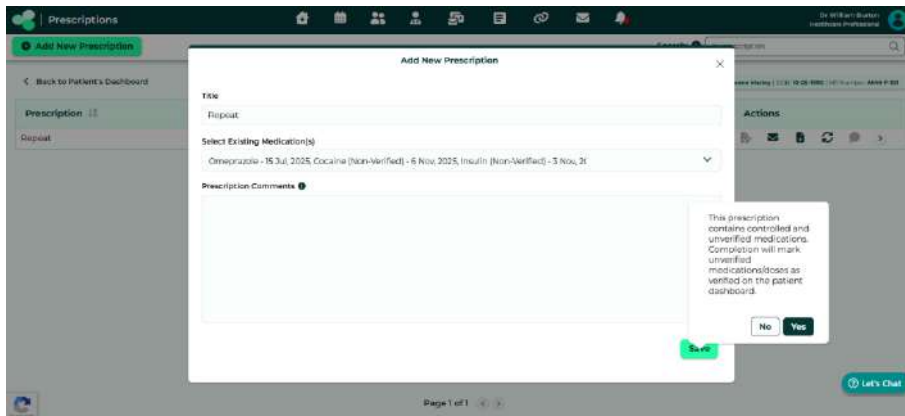


- Each medication selected will now be visible in the **Select Existing Medication** field along with their status – **Verified, Non-verified or Controlled Drug**.



- A pop-up for each medication will appear with the following fields: **Medication Start Date, Duration, Type, Repeat, Dose, Frequency** and **Route**. These fields will be pre-populated with the information that has been added to the **Patient Dashboard**. It is important to check that these details are correct before proceeding.
- Click **Next** Complete the pop-up for all medications on the **Prescription**.
- If there are any specific prescription notes add these in the **Prescription Comments** field.
- Click **Save**

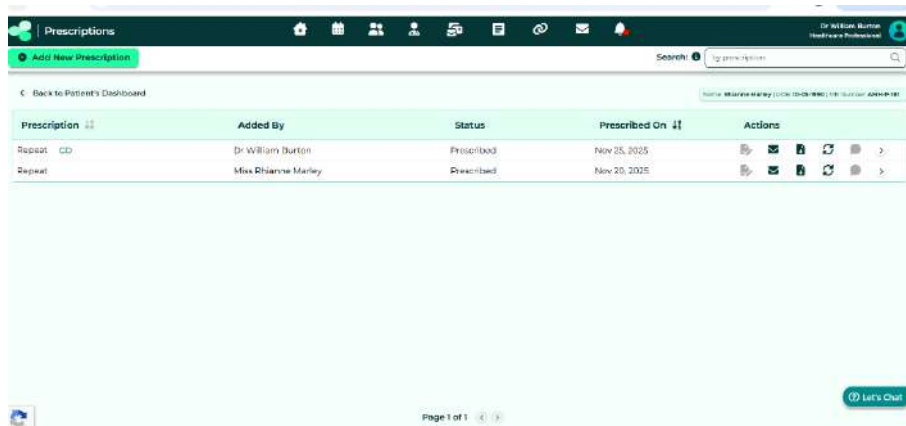
Depending on the content of the **Prescription** a statement will appear asking you to confirm the **Prescription** 'This prescription contains controlled and non-verified medications. Completion will mark unverified medications/doses as verified on the patient dashboard'. In this example the **Prescription** contains non-verified medication and a controlled drug.



- Click **Yes**.

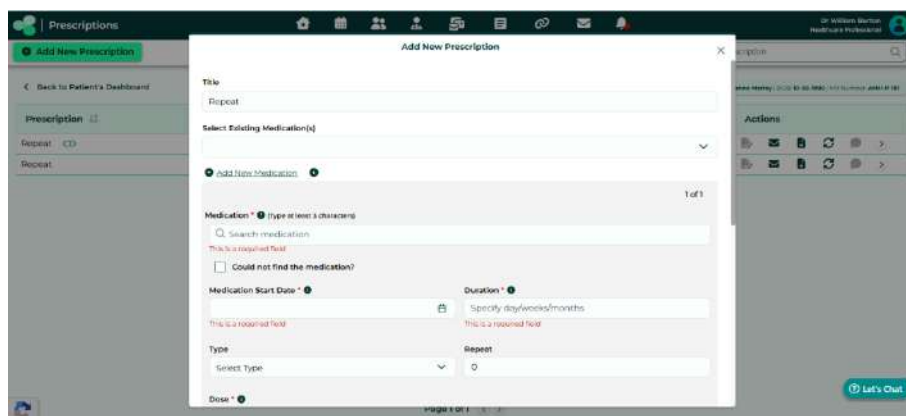
Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress.

The is now visible on the **Patient's Dashboard**.

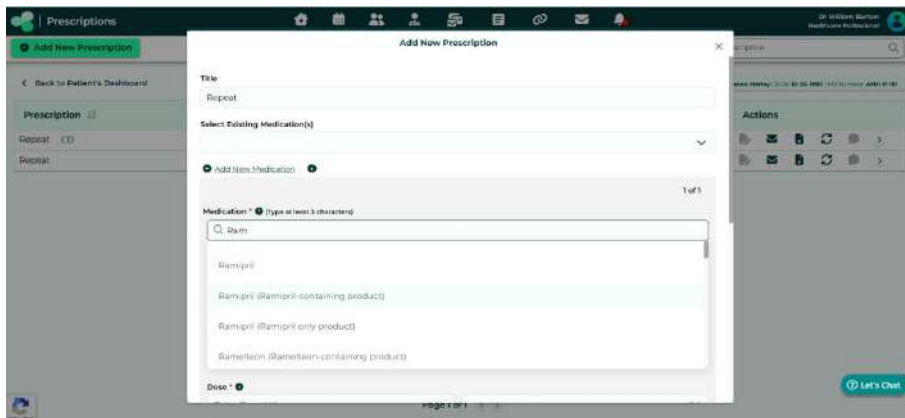


### Adding a New Medication to a Prescription

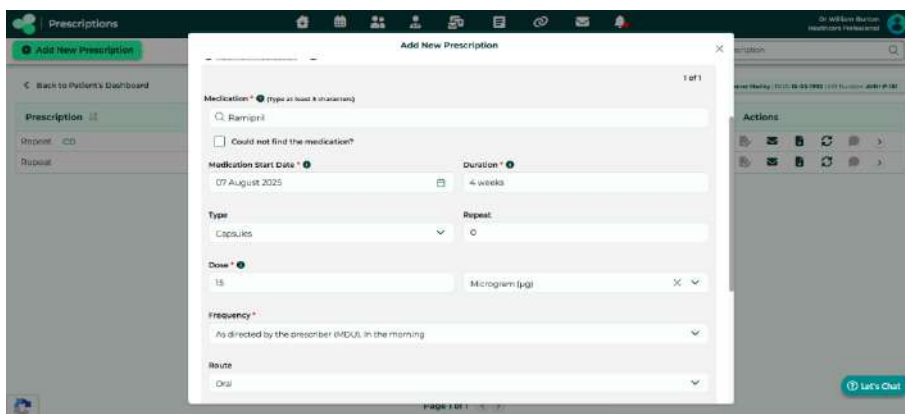
- To add a new **Medication** to a **Prescription** in the **Add New Prescription** screen click on **Add New Medication**.



- Search for the **Medication** you wish to prescribe and select from the drop-down menu



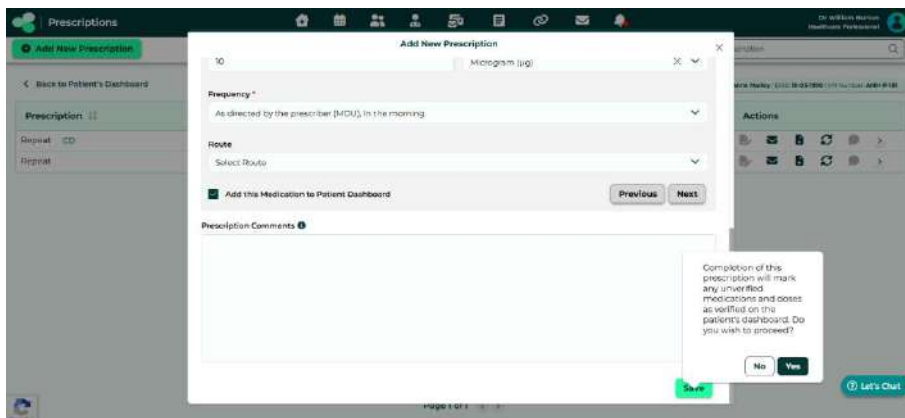
- Select the **Medication Start Date** using the calendar icon.
- Specify the **Duration**.
- Choose the **Type** using the drop-down menu.
- Select the **Dose** and **Unit**.
- Choose the **Frequency** of the medication from the drop-down menu.
- Select the **Route** of the medication from the drop-down menu.



As this is a new medication, there is an option to add it to the Patient's Dashboard.

- Check the **Add to Patient's Dashboard** box and any **Prescription Comments**.
- If there is more than one new **Medication** click **Next** and repeat the above process. Otherwise click **Save**.

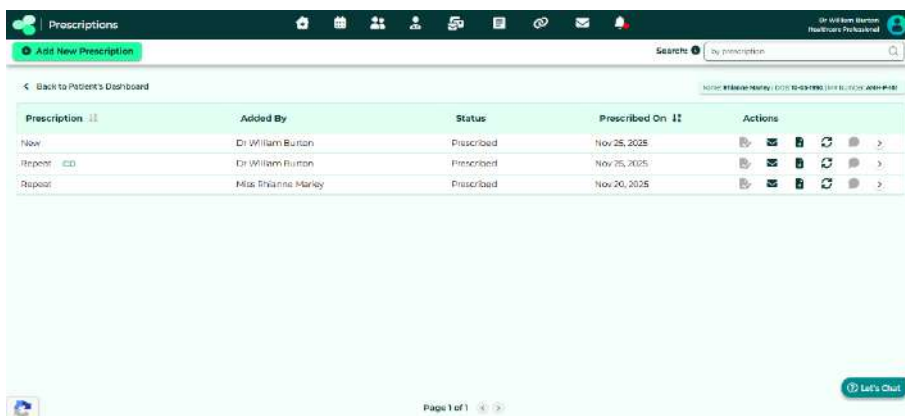
Depending on the content of the **Prescription** a statement will appear asking you to confirm the **Prescription** 'Completion of this prescription will mark any unverified medications and doses as verified on the patient's dashboard. Do you wish to proceed?. In this example the **Prescription** contains a new non-verified medication.



- Click **Yes**.

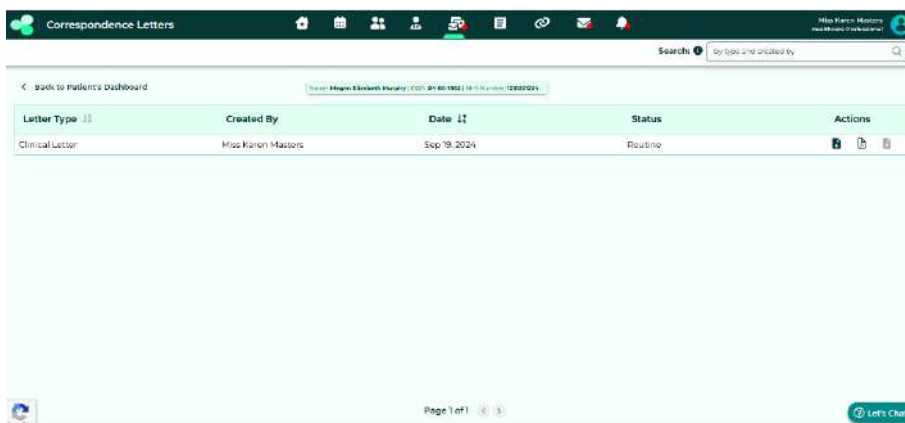
Failure to complete the fields marked with an asterisk (\*) will result in an error message being displayed and you will not be able to progress

You can now view the prescription on the **Patient's Dashboard**.



## Correspondence

You can view your letters and communication with your patient by clicking on the **View HCP Correspondence** box.



## Downloading a Summary of a Patient's Medical History

You can download a summary of a **Patient's Medical History**, by clicking the **Download Medical History** button when on their dashboard which can be found on the right-hand side of the **Medical Dashboard** under the your name. The document opens in a separate window as a PDF which can then be printed or saved on your computer.

The summary includes the following details for the patient:

1. Personal and Biometric Information.
2. Diagnoses.
3. Medications.
4. Allergies.
5. Vaccinations.
6. Supplements.

Patient Name: Miss. Megan Murphy      Generated by: Miss. Karen Masters      Generated on: 28 November 2025 7:54 pm

**Personal and Biometrics Information**

**Title:** Miss      **Name:** Megan Elizabeth Murphy

**Date Of Birth:** 04 Jun, 1963      **Complete Address/Post Code:** Third Floor Flat, 68 Harley Street, London

**Blood Group:** O RHD positive [O+]

**Weight:** 14.84 kgs on 25 Nov, 2025

**BMI:** 5.12

**Diagnosis**

**Measles**  
Diagnosis date: 10 Sept, 2025  
Added by: Miss. Megan Elizabeth Murphy  
Added on: 11 Nov, 2025

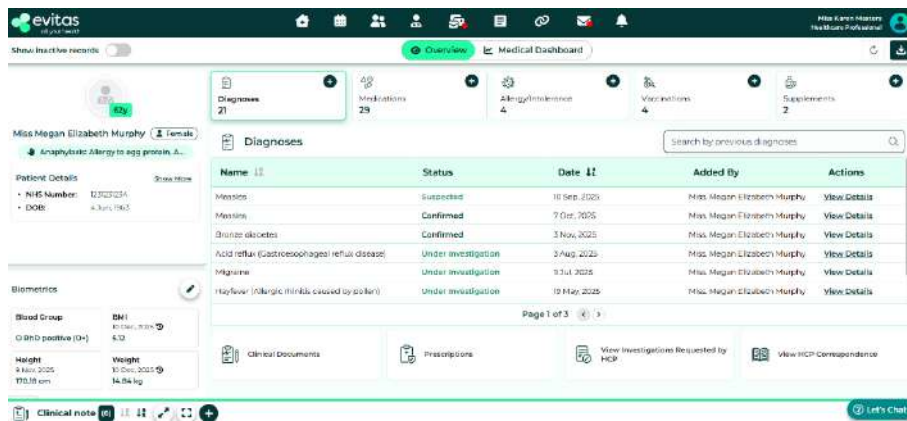
**Measles**  
Diagnosis date: 07 Oct, 2025  
Added by: Miss. Megan Elizabeth Murphy  
Added on: 11 Nov, 2025

**Notes History:**

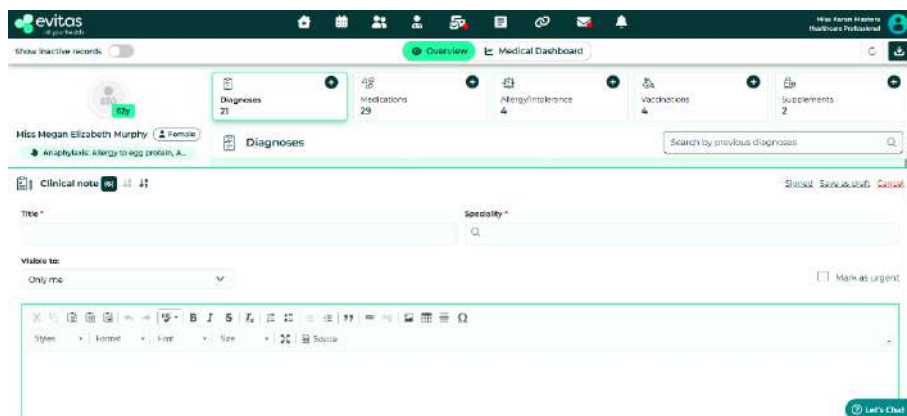
- Note:
  - Status: Confirmed
  - Added by: Miss. Megan Elizabeth Murphy on 11 Nov, 2025
- Note:

## Clinical Notes

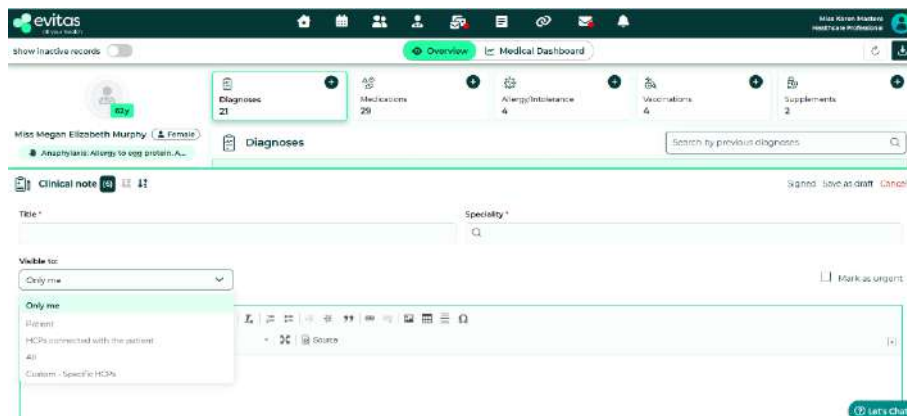
When in a **Patient's Dashboard** you can create a **Clinical Note**. This can be populated at any time but is particularly useful during a consultation for example.



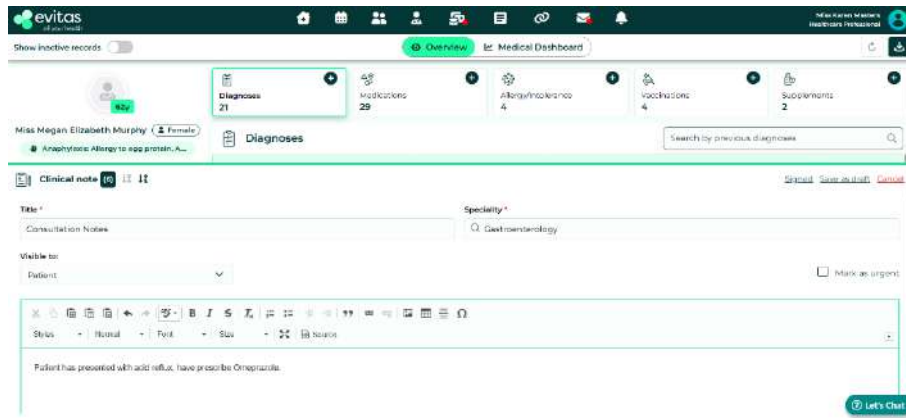
- Click on the + to **Add a New Clinical Note**.



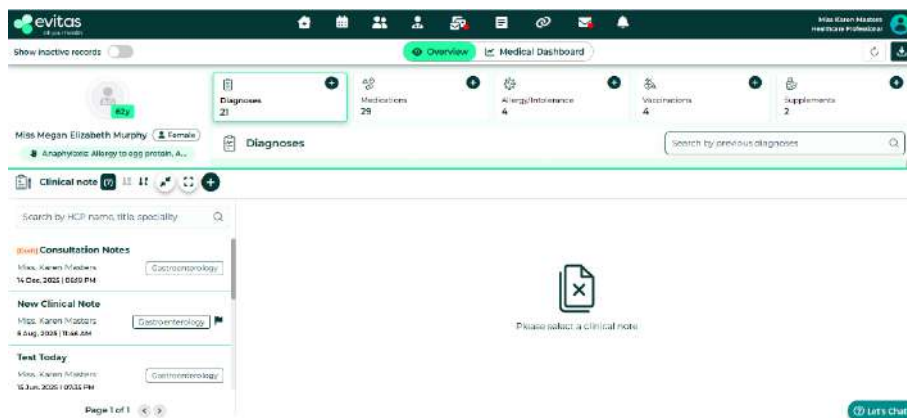
- Complete the **Title** and **Speciality** fields.
- Select who you would like to be able to view the **Clinical Note**. The options are:
  - Only me
  - Patient
  - HCPs connected with the patient
  - All
  - Custom – Specific HCPs



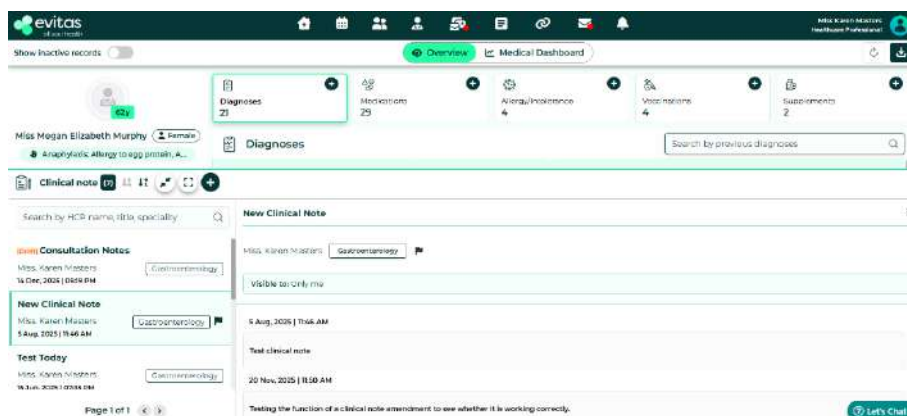
- Type your text in the free text field.



- The **Clinical Note** can be **Signed**, **Saved as a Draft** or **Cancelled**. Click the most appropriate option.
- Click on the expand icon to view a list of all **Clinical Notes**.



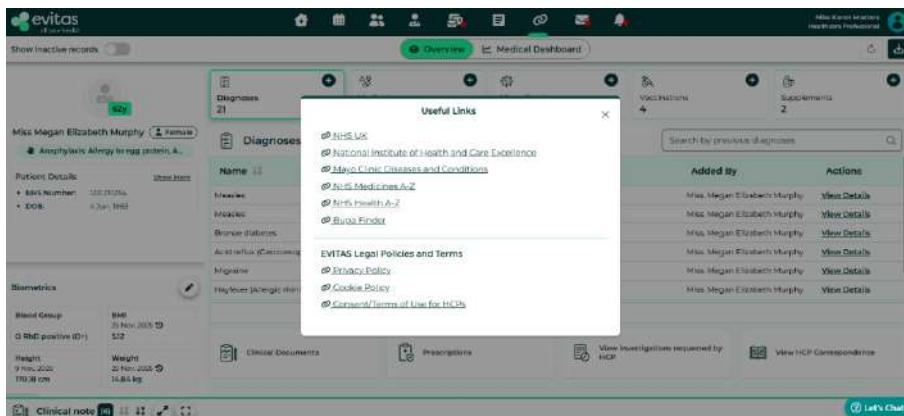
- Click on a **Clinical Note** to view it.



You can view and organise any clinical notes by clicking under the **Clinical Notes** field on the bottom left corner of the page. You can organise these notes alphabetically or by date added by clicking on the icons.

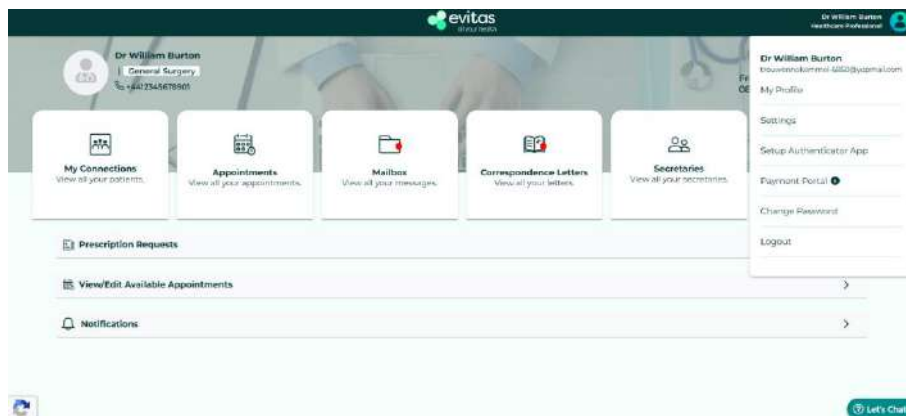
## Useful Links

Evitas has provided some resources that might be useful to you. Access the **Useful Links** by clicking the top icon or the sidebar. You will then notice a pop-up showing a list of useful sites. You can also review Evitas's **Privacy Policies** and **Terms of Use** by clicking on the provided links.

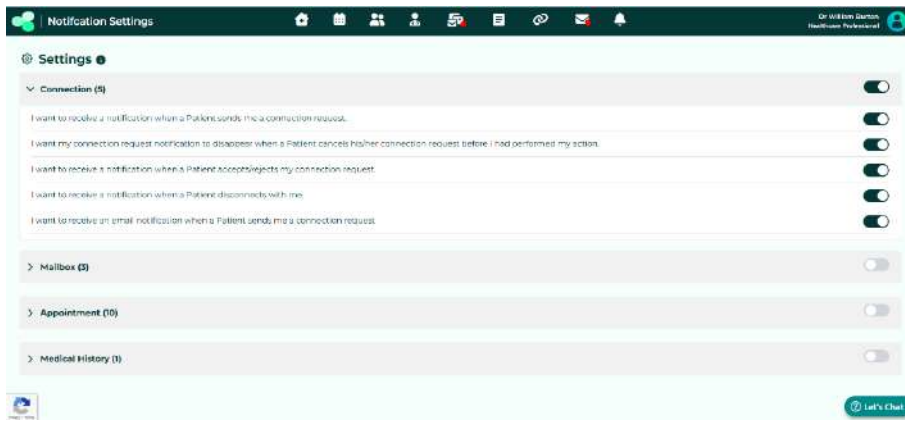


## Profile Settings

You can change your profile settings by clicking on the people's icon on the top left hand side with your name on it. Clicking it will show a drop-down menu that you can select from.



- Click on **My Profile**. You can now edit your profile information if needed.
- Click on **Settings**. You can now edit your notification settings for all facets of your profile.



- By clicking on **Change Password**, you can create a new password.

Finally, You can also log out from your profile by clicking on the **logout** option in the menu bar.