Total Medical Compliance -- eManual Portal

TMC eManual
ComplianceBridge Overview
for the
Business/Practice Administrator

March 2023

Terminology

1. **TMC Administrator** – the TMC employee(s) who manage users, content, and other features of the eManual and its related processes.

2. **Business/Practice Administrator or Administrator (Admin)** – the employee who is responsible for completing/entering the practice or business-specific information into the eManual (Administrative Fillable(s)). This is an edit/publish capability.

3. **Staff** – any other employee who will use the Staff credentials provided to them by their Administrator to log-in and view policies. This is a read-only capability.

4. **ComplianceBridge** – the software vendor who provides the TMC eManual platform and technical support (e.g., page not loading/site down, forgot password issues, document not publishing, etc.)

5. **eManual Portal** – the read-only area (Module) where published policies are available for Staff to view (read-only).

6. **eManual Management** – the area (Module) where the Administrator can publish completed Administrative Fillable policies/documents (see below).

Terminology

7. **eManual policy/document** – this is a policy/document that is one of the following:
   a. A policy that does not require any practice/business-specific information (it is read-only or "static").
   b. A policy that has a PDF or other document to download for use.
      i. Guidance
      ii. PDF forms (some are fillable)

8. **Administrative Fillable(s)** – these are customized policies/documents that require practice/business-specific information. Certain fields are checkboxes and text boxes, but the content provided by TMC is read only. The Administrator is responsible for completing these and publishing them to the eManual portal for their Staff to access/view.

9. **Category(ies)** – Think of these as tabs in a binder. It is the system feature that supports the structure (order) for the table of contents in each eManual. Each policy/document is published under a category to ensure correct placement in the eManual.

10. **Document ID** – A secondary level of organization for policies/documents under each category. Documents should be sorted by this field in the eManual Portal to ensure the correct/intended order.

Order of Steps to Complete a New eManual

1. Business/Practice Administrator receives 2 automated Welcome emails from the system. **If the email/contact for the Staff log-in is not the same, the Staff Welcome email will go to the email provided by you for that contact.** Check junk/spam if not received.
   - **Welcome email #1:** Business/Practice Administrator log-in
   - **Welcome email #2:** Staff log-in *(It is recommended to wait to provide this to the Staff until the Administrative Fillables are completed and published).*

2. Clicks on the link in the Welcome email to log-in for the first time and update temporary password. The system will take them directly to the area to update the password.
   - **This must be done for their Administrator profile as well as the Staff profile**.

3. Returns to the Business/Practice Administrator Welcome email and click on the link to view the training tutorial and other resources.

4. Follows the process to complete and publish the Administrative Fillables for their business/practice.

5. Provides the Login Name, Password, and the eManual Portal link to Staff members so they can view policies and download forms/PDFs.

REMINDER

The Business/Practice Administrator should complete and publish all Administrative Fillables with the applicable business/practice-specific information **prior** to distributing the link to log into the **eManual Portal** with the Staff Login Name and (permanent) Password to the Staff.

https://secure.compliancebridge.com/totalmed/portal/

Sample Welcome Email

Your TMC eManual Account Information

emanual_support@totalmedicalcompliance.com
<emanual_support@totalmedicalcompliance.com>
via 904509-db2.compliancebridge.com

Wed 3/15/2023 6:26 AM

To:

Cc: emanual_support@totalmedicalcompliance.com <emanual_support@totalmedicalcompliance.com>

TMC
TOTAL MEDICAL COMPLIANCE

Hello Shirley M.,

Welcome to your **Family Practice - Main Street** eManual account!

You may access the system by going to the following website: https://secure.compliancebridge.com/totalmed/portal/

Login Name and Temporary Password:

You will be required to change your password the first time you log in.

Training and FAQs can be found here: Total Medical Compliance Online Compliance Manuals (eManuals)
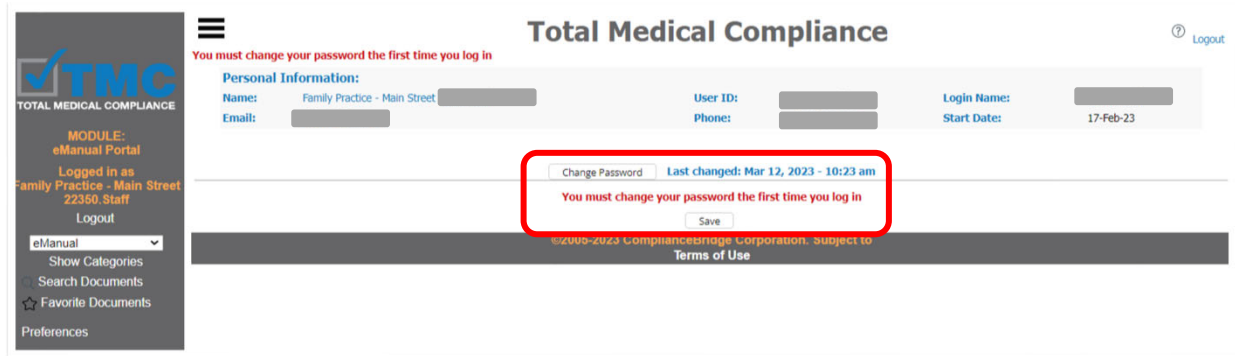
Best regards,

Technical Support
support@compliancebridge.com
(800) 317-2820 x702

TMC eManual Support Team
eManual_Support@totalmedicalcompliance.com

First Log-In Change Password
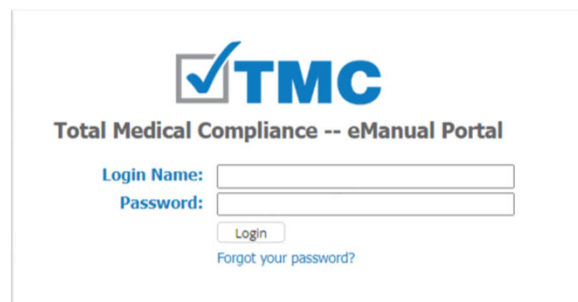
This must be done for the Business/Practice Admin account as well as the Staff account.

Business/Practice Administrator Tour

Click the link to the eManual Portal
(https://secure.compliancebridge.com/totalmed/portal/) and log-in.

Business/Practice Administrator Tour

You will automatically see all eManuals for your business/practice after logging in.
Business/Practice Administrators can choose whether to display the content "Open"
or "Closed" using the Preferences section located at the bottom of menu on the left.

Business/Practice Administrator Tour

Closed view

Click on the ➕ to expand the contents.

Business/Practice Administrator Tour

Open view

Click on the ➖ to collapse the section.

Business/Practice Administrator Tour

Click on a policy Title to open.

Policies will open in 1 of 2 ways.

Business/Practice Administrator Tour

The most common way a Policy will open is in new browser tab as a *read only* view of the policy using Microsoft Word (you do not need to purchase a license for this).
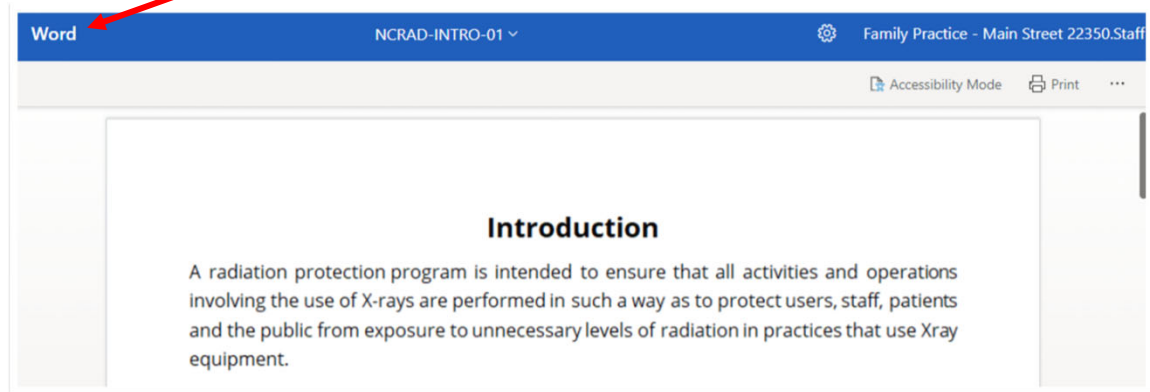
Business/Practice Administrator Tour

The other way a Policy will open is in a new browser tab with a link to download a PDF or other document. This is most common with certain forms and customized policies (Administrative Fillables).
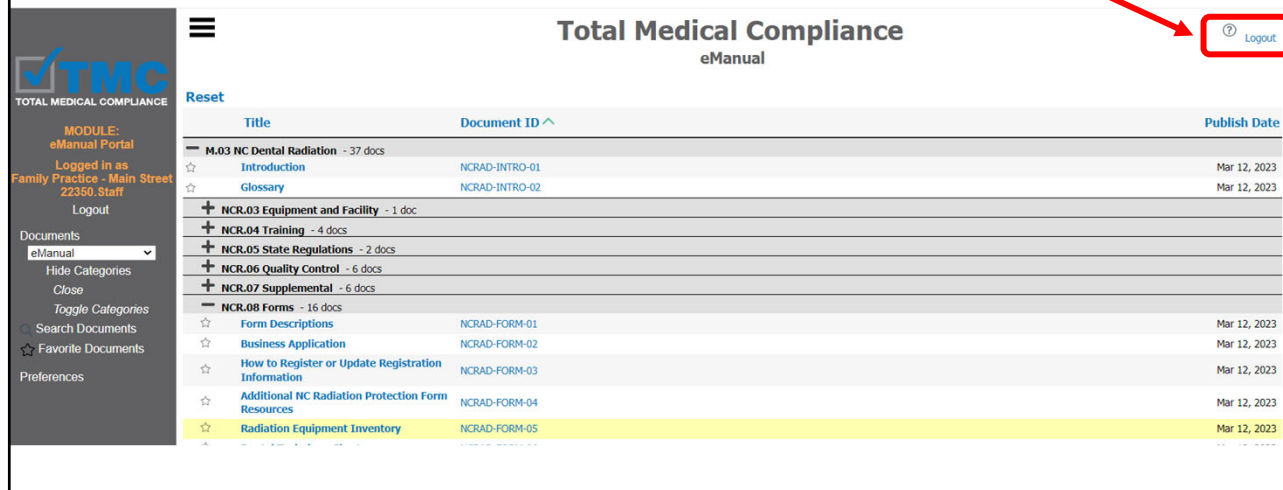

Free Adobe Acrobat Reader Download

https://get.adobe.com/reader/?no_ab=1

Business/Practice Administrator Tour

When you're finished, close the browser tab and return to the tab with the eManual table of contents. You can open another policy or Logout.
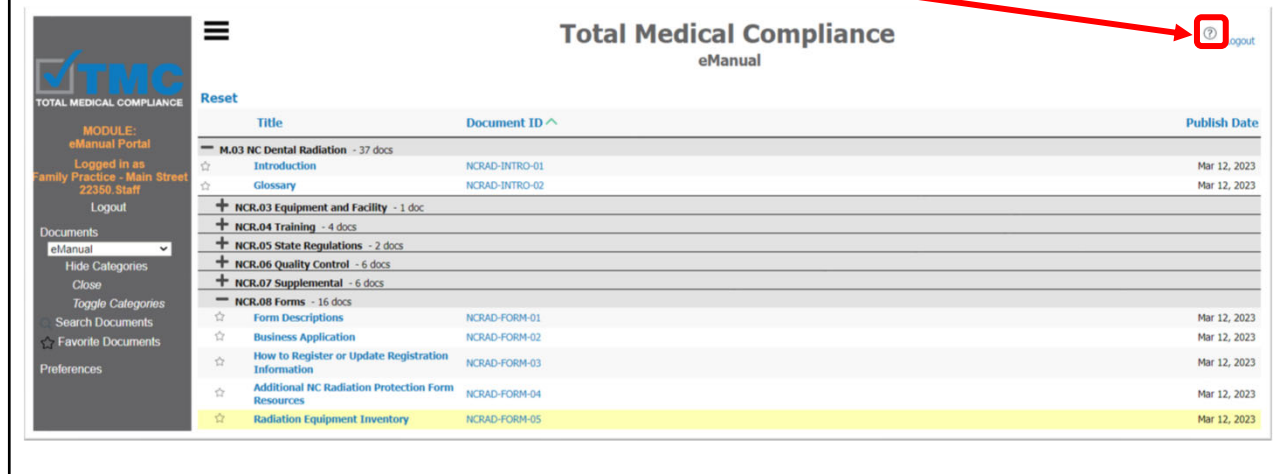

Note

The ⓘ icon opens help from ComplianceBridge and is not intended for Business/Practice Administrators or Staff.

Always refer to TMC's training tutorial and resources found at the link in your Welcome email.
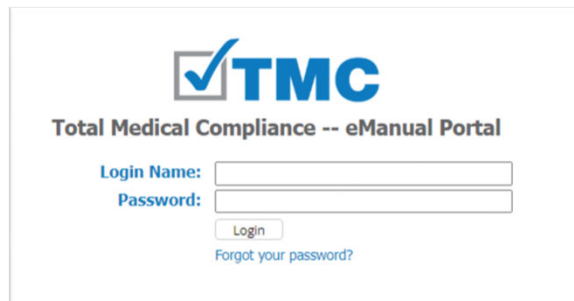
Customizing Your eManual Administrative Fillables

WHAT YOU WILL NEED:

1. Administrator access to your business/practice eManual(s)

2. Information about your business/practice to complete the policies.

3. Training tutorial and reference documents from Welcome email link.

4. A folder on your computer's desktop to save PDFs (temporary).

5. Word document(s) to assist with completing the policy names and Document IDs during the publishing process. Example:

   HIPAA CE - ADMINISTRATIVE FILLABLE POLICIES - COPY PASTE FOR ADMINS

   This document can be found and downloaded while logged in to the eManual Portal as the Administrator under "HE.09 HIPAA Reference" in the HIPAA Covered Entity eManual.

Customizing Your eManual Administrative Fillables

Click the link to the eManual Portal
(https://secure.compliancebridge.com/totalmed/portal/) and log-in.

Customizing Your eManual

① Make sure the dropdown menu under "Documents" is set to "Administrative Fillable" on the left side of your screen.

Customizing Your eManual

② Click the Title of the policy you want to work on.

Customizing Your eManual

Complete the sections as they apply to **your business/practice.**
Click "Save"

Customizing Your eManual

Next, click the "Submit" button
Click "OK" to proceed

Customizing Your eManual

5

Click the "OK" button to confirm submission.

Customizing Your eManual

6

You will be returned to the Administrative Fillable list.
Next to the policy you just submitted, you will see a magnifying glass in the "View Submitted" column.

Title	Document ID ^	Publish Date	Previously Submitted	View Submitted	Latest Status
☆ Protection of Persons in Room During Exposure	NCRAD-WSP-07	Mar 12, 2023	1	🔍	Submitted Mar 12, 2023

Click on the magnifying glass to open your policy and click the link for the date you submitted.
There can be multiple submissions if edits are made at a later date and re-submitted.

Close this Window

Protection of Persons in Room During Exposure, version 1.0
previously submitted

Submitted		Approver(s)	Status	Approval Order
2023-03-12 12:37:19	Copy	No approval required		Cancel

If this is a new/updated version of the same policy, click the most recent date listed.

Customizing Your eManual

A new browser tab will open, and you will see your completed policy.

Close Window

Protection of Persons in Room During Exposure, version 1.0
Family Practice - Main Street 22350.Admin
Submitted: Mar 12, 2023

Protection of Persons in Room During Exposure

PRESENCE DURING EXPOSURES:

Based on [.0603(a)(1)(E)] it is the policy of this office that without approval of the RSO, no one is allowed in the room with the patient during a radiographic exposure. When holding is required the policy is to use the parent/caregiver whenever possible. If professional staff and ancillary personnel are required for the procedure, then the listed safety measures are used.

LEAD SHIELDING:

Lead aprons or non-lead equivalent required by [.0603(a)(1)(F)] are provided and should be worn by all patients when X-rays are taken.
☑ Thyroid collars will be used, whenever practicable, with all patients but especially children.
Lead shielding:

- Will be inspected before each use for any cracks or damage and if detected the RSO will be notified.
- Will be stored unfolded to help prevent cracking.

  Aprons are located:
  ☐ In the hygiene operatory (ies).
  ☐ In the dental exam rooms.
  ☑ In the close vicinity of the pan/ceph unit.
  ☐ In every room that houses an X-ray unit.
  ☐ Other:

Customizing Your eManual

eManual

Title	Document ID ∧
➕ **M.02 HIPAA Covered Entity** - 1 doc	
➖ **M.03 NC Dental Radiation** - 50 docs	
☆ Introduction	NCRAD-INTRO-01
☆ Glossary	NCRAD-INTRO-02
➕ **NCR.01 Written Safety Plan** - 2 docs	
➕ **NCR.02 Practice Specific Protocols** - 5 docs	
➕ **NCR.03 Equipment and Facility** - 1 doc	
➕ **NCR.04 Training** - 9 docs	
➕ **NCR.05 State Regulations** - 2 docs	
➕ **NCR.06 Quality Control** - 6 docs	
➕ **NCR.07 Supplemental** - 6 docs	
➕ **NCR.08 Forms** - 16 docs	
➖ **NCR.09 Resources** - 1 doc	
☆ **NC DEN RAD - ADMINISTRATIVE FILLABLE POLICIES - COPY PASTE FOR ADMINS**	NCRAD-RES-01

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MODULE:
eManual Portal

Logged in as
Family Practice - Main Street
22350.Admin
Logout

eManual Management
Documents
eManual ▾
Hide Categories
Close
Toggle Categories
🔍 Search Documents
☆ Favorite Documents

Preferences

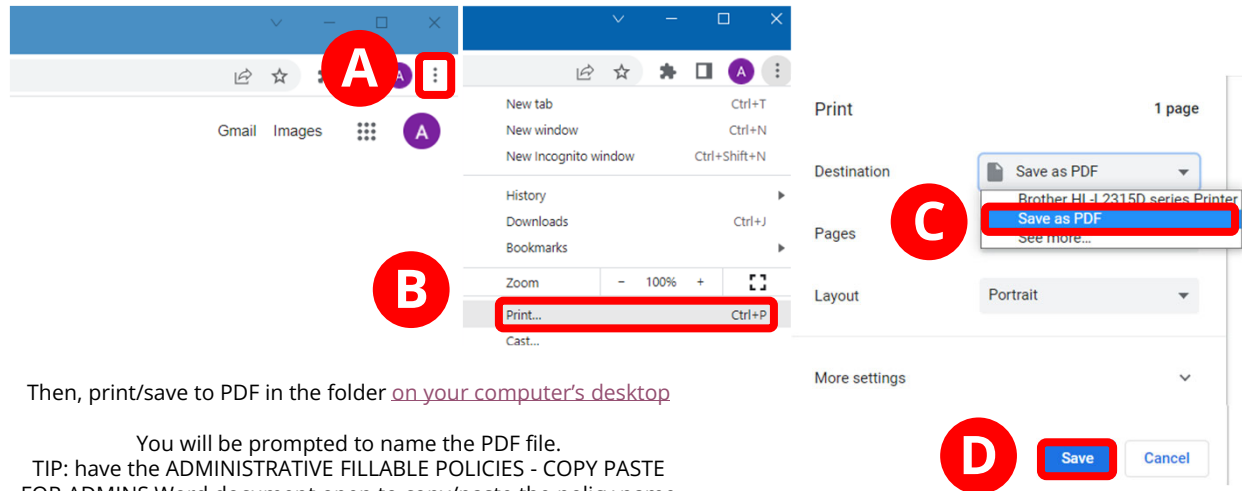Print/save to PDF in the folder on your computer's desktop

You will be prompted to name the PDF file.
TIP: have the ADMINISTRATIVE FILLABLE POLICIES - COPY PASTE FOR ADMINS Word document open to copy/paste the policy name as the PDF file name.

Customizing Your eManual

**HOW TO PRINT OR SAVE A PAGE AS A PDF FILE IN GOOGLE CHROME**

Adobe PDF license not required

A **B** **C** **D**

Then, print/save to PDF in the folder on your computer's desktop

You will be prompted to name the PDF file.
TIP: have the ADMINISTRATIVE FILLABLE POLICIES - COPY PASTE FOR ADMINS Word document open to copy/paste the policy name as the PDF file name.

Customizing Your eManual

HOW TO PRINT OR SAVE A PAGE AS A PDF IN MICROSOFT EDGE

Adobe PDF license not required

A **B** **C** **D**
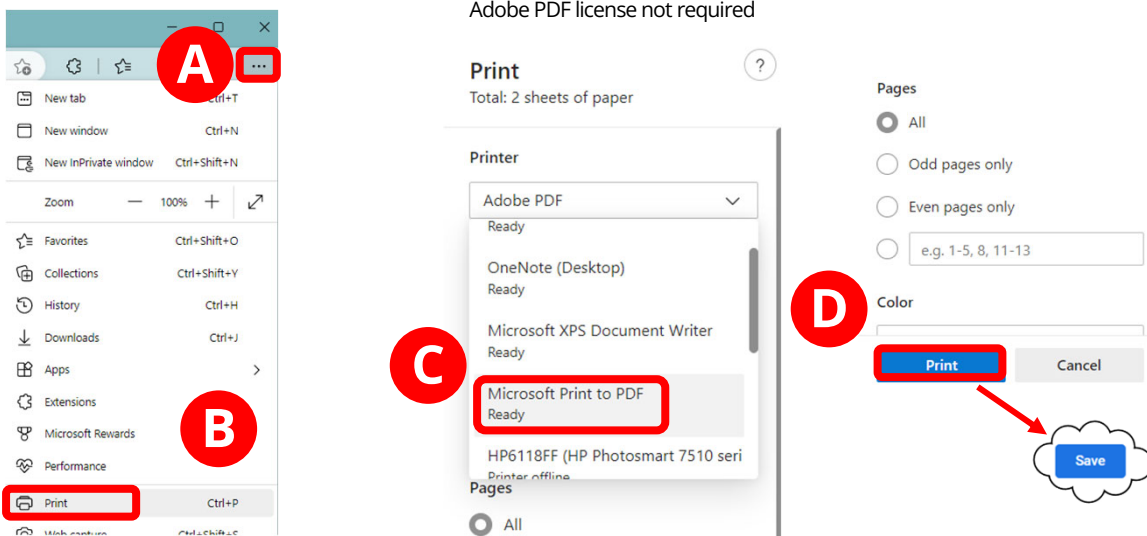
Customizing Your eManual
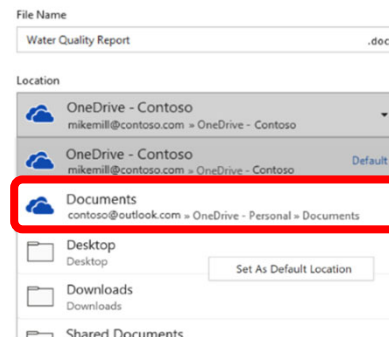## Saving and Maintaining PDFs

- Save these PDFs to a New Folder on your computer's desktop.
- After you publish the PDFs as customized policies in your practice's eManual – there is no requirement to keep them on your computer.
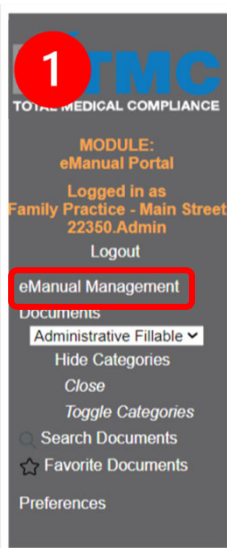
Save a file in Windows - Microsoft Support

OPEN THE APPLICABLE WORD DOCUMENT
ENDING IN:

"ADMINISTRATIVE FILLABLE POLICIES - COPY
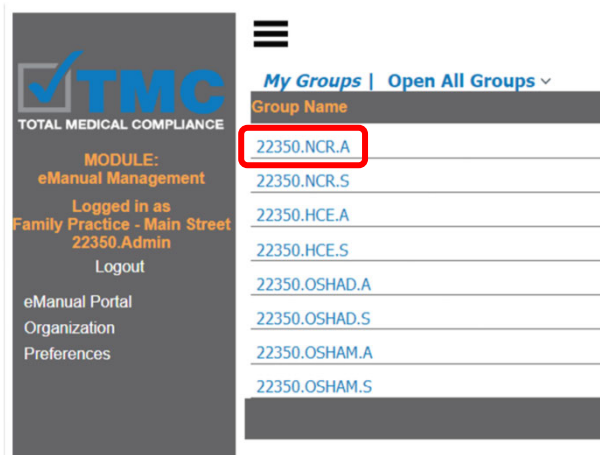PASTE FOR ADMINS"

Time to Publish Your Customized Policy to the eManual Portal!

Close the browser tab(s) and return to the tab with the eManual Table of Contents.

On the left side of the screen, click on "eManual Management"

Click on the eManual name where the policy belongs. Under "Group Name"

Note, you will click on the Group that ends in "A" to publish as an Admin.

Publishing Your Customized Policy

On the left side of the screen, click on "New Document"

Then choose "eManual document" and click "Submit"

Publishing Your Customized Policy

Copy/paste the policy's Document Title, Document ID, and select the Category (section of the table of contents) and click "Save"

Use the applicable "ADMINISTRATIVE FILLABLE POLICIES - COPY PASTE FOR ADMINS" Word document to help quickly and accurately complete these sections. Found in the "Resources" section of each eManual.

Publishing Your Customized Policy

Click the Title of the policy title to open the draft.

Publishing Your Customized Policy

Click "Import" in the Header section.

Publishing Your Customized Policy

Choose the PDF from the desktop folder and click "Open" to upload it.
Then, click "Load"

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Publishing Your Customized Policy

9

Click "Ignore" when your document is attached.

You will see it here once it is attached.

Publishing Your Customized Policy

⑩

Then, click "Publish" in the top menu

Publishing Your Customized Policy

Select both groups. One ends in "A" and "S". Click "Select" then "Save"

⑪

Why?
This is what is available in the eManual Portal in read-only format for Staff.

Publishing here ensures that the Staff can view the policies and limits their ability to edit/alter them.

Publishing Your Customized Policy

Click "Publish" at the bottom of the page!
Your customized policy is now available in the eManual Portal to all Staff!

View Your Customized Policy in the eManual Portal!

Click on "eManual Portal" in the left side menu and be sure
the dropdown is set to "eManual"
See your policy in the table of contents!

View Your Customized Policy in the eManual Portal!

Click the Title, then click to open the PDF
It will open in a new browser tab (based on your browser settings)

Close this Window   (Hide)

Protection of Persons in Room During Exposure
Version: 1.0
Publish Date: Mar 12, 2023

[NCRAD-WSP-07_-_Protection_of_Persons_in_Room_During_Exposure.pdf]

View Your Customized Policy in the eManual Portal!

Close the browser tab (or click "Close Window") when finished and return to the eManual Portal/table of contents tab.

3 Close Window

Protection of Persons in Room During Exposure, version 1.0
Family Practice - Main Street 22350.Admin
Submitted: Mar 12, 2023

Protection of Persons in Room During Exposure

PRESENCE DURING EXPOSURES:

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Lead shielding:

- Will be inspected before each use for any cracks or damage and if detected the RSO will be notified.
- Will be stored unfolded to help prevent cracking.

Aprons are located:
In the hygiene operatory (ies).
In the dental exam rooms.
☑ In the close vicinity of the pan/ceph unit.
In every room that houses an X-ray unit.
Other:

SAFETY MEASURES FOR PROFESSIONAL STAFF AND ANCILLARY SUPPORT FOR HOLDING PATIENTS AND/OR FILM DURING EXPOSURE

3/15/2023

(Optional) Delete PDFs Saved in Desktop Folder

Once you've verified your policy has been published, you may delete the PDFs saved in the desktop folder on your computer – this is optional, but it is not necessary to maintain the customized policy PDFs in both places.

Who To Contact

TMC
- Policy content questions.
- How to fill out your eManual.
- Billing, pricing, adding new/additional eManuals.
- Did not receive "Forgot Password" email.

eManual_Support@totalmedicalcompliance.com

ComplianceBridge
- Log-in page will not load.
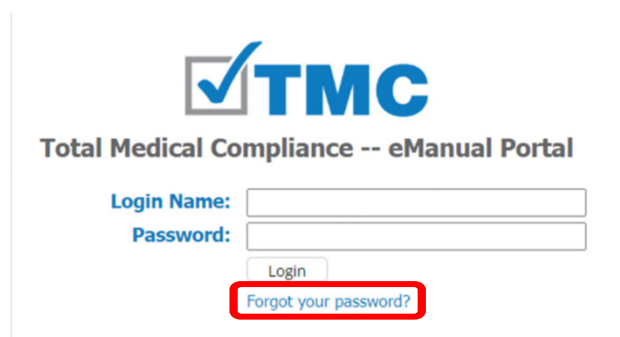- Other technical/functionality issues.

support@compliancebridge.com

Forgot Your Password?

TMC no longer maintains, or resets forgotten passwords.

Click "Forgot your password?"
You will receive an email with instructions on how to reset your password.