## MYSOZO & SOZOAPP CLINICIAN Share Data Feature

### **To Share Data**

- Data can be shared from 3 locations
  - Patient list (1)
     All measurements will be shared
  - Patient Dashboard (2)
     All measurements will be shared
  - Results (3)
     Choice between sharing all measurements or current measurement





- Select "Share Data"
- Type and select the clinic you want to share data with
  - If the clinic name is greyed out and says "version not compatible" that means the clinic is not on the latest version of software and can't receive shared data
- Note: An email for a particular SOZO user can be included to receive email notification that they have received shared data
- Select "Share"
- To recall data that has been shared, first select the Shared Data tab, then select "Outgoing". Click the 3 dots next to the record to be recalled and select "Recall"
  - Select the eye icon to view recall details
  - Note: if receiving clinic has already imported shared data it can't be recalled



impedimed	Hospital Me	dical Center				Clinician	0	()	Ô	JD
	ups Shared Da	ata <sup>2</sup> Analytics								
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LAST NAME 🗘	FIRST NAME 🗘	DOB 🗘	SENDER 🗘	DATE 🗘	RECEIVER 🗘			STATU	is 🗘	
Anderson	Mattie	27 Apr 1956	manderson@hmc.com	08 Jan 2023	Medical Health	n Center				
Atkinson	Jacqueline	30 Aug 1977	jatkinson@hmc.com	17 Apr 2023	Medical Health	n Center	$\rightarrow$	Recall	Data	
Armstrong	Matilda	13 Aug 1939	marmstrong@hmc.com	05 Jan 2023	Medical Health	n Center				
Abott	Jeremias	05 Dec 1960	jabott@hmc.com	23 Dec 2013	Medical Health	n Center				
Baker	Ingo	30 Mar 1947	ibaker@hmc.com	27 Jan 2023	Medical Health	n Center				
Campbell	David	03 Feb 1958	dcampbellhmc.com	08 Jun 2023	Medical Health	n Center				
Duncan	Jessica	25 Mar 1953	jduncan@hmc.com	13 Aug 2023	Medical Health	n Center				
Davidson	Anna-Maria	11 Apr 1940	adavidson@hmc.com	15 Jan 2023	Medical Health	n Center				
Earnheart	Henrv	13 Apr 1956	hearnheart@hmc.com	10 Mar 2023	Medical Health	n Center				

## MYSOZO & SOZOAPP CLINICIAN Share Data Feature

#### To View Data You Have Shared or Has Been Shared With You

#### VIEW OUTGOING DATA

- Select the Shared Data tab
- Select "Outgoing"
- View list of patients where data has been shared
  - Patient's Last Name
  - Patient's First Name
  - Patient's DOB
  - Sender which Clinician sent the data
  - Date Date data was sent
  - Receiver Clinic the data was shared with
  - Status If data was recalled
- Filter the list of Receivers by selecting the filter icon
- Sort the list by clicking the arrows next to any field listed above

#### VIEW INCOMING DATA

- Select the Shared Data tab
- Select "Incoming"
- View list of patients that have been shared with you
  - Patient's Last Name
  - Patient's First Name
  - Patient's DOB
  - Sender Clinic who shared the data with you
  - Date Date data was received
  - Receiver What clinician the data was assigned to (if any)
  - Status If data is new or has been imported
- Filter the list by Receivers by selecting the filter icon
- Sort the list by clicking the arrows next to any field listed above
- The eye icon next to Status will provide import details

impedimed	Hospital Me	dical Center				Clinician	0	) (j		JD
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Anderson	Mattie	27 Apr 1956	manderson@hmc.com	08 Jan 2023	Medical Healt	n Center				
Atkinson	Jacqueline	30 Aug 1977	jatkinson@hmc.com	17 Apr 2023	Medical Healt	n Center				
Armstrong	Matilda	13 Aug 1939	marmstrong@hmc.com	05 Jan 2023	Medical Health	n Center				
Abott	Jeremias	05 Dec 1960	jabott@hmc.com	23 Dec 2013	Medical Healt	n Center				
Baker	Ingo	30 Mar 1947	ibaker@hmc.com	27 Jan 2023	Medical Healt	n Center				
Campbell	David	03 Feb 1958	dcampbellhmc.com	08 Jun 2023	Medical Healt	n Center				
Duncan	Jessica	25 Mar 1953	jduncan@hmc.com	13 Aug 2023	Medical Healt	n Center				
Davidson	Anna-Maria	11 Apr 1940	adavidson@hmc.com	15 Jan 2023	Medical Healt	n Center				
Earnheart	Henry	13 Apr 1956	hearnheart@hmc.com	10 Mar 2023	Medical Healt	n Center				
Ferguson	Harris	10 Aug 1972	hferguson@hmc.com	19 Jan 2023	Medical Healtl	n Center				

impedimed	Hospital Me	dical Center			Admin	Clinician	?	<b>i</b>	Ø	JD
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Anderson	Mattie	27 Apr 1956	Medical Health Center	08 Jan 2023	-		+2	NEW		
Atkinson	Jacqueline	30 Aug 1977	Medical Health Center	17 Apr 2023	-		+2			
Armstrong	Matilda	13 Aug 1939	Medical Health Center	05 Jan 2023	mdoell@hosp	italmedi 🧿	+2	NEW		
Abott	Jeremias	05 Dec 1960	Medical Health Center	23 Dec 2023	jdoer@hospita	almedica 🧿	+2			
Baker	Ingo	30 Mar 1947	Medical Health Center	27 Jan 2023	jdoer@hospita	almedica 🧿	+2			
Campbell	David	03 Feb 1958	Medical Health Center	08 Jun 2023	-		+2			
Duncan	Jessica	25 Mar 1953	Medical Health Center	13 Aug 2023	-		+2	IMPO	RTED	⊚ …
Davidson	Anna-Maria	11 Apr 1940	Medical Health Center	15 Jan 2023	-		+2	IMPO	RTED	•••
Earnheart	Henry	13 Apr 1956	Medical Health Center	10 Mar 2023	-		+2	IMPO	RTED	⊚ …
Ferguson	Harris	10 Aug 1972	Medical Health Center	19 Jan 2023	-		+2			

# MYSOZO & SOZOAPP CLINICIAN Share Data Feature

# To Add Other Receivers to Incoming Data

- Select the Shared Data tab
- Select "Incoming"
- Select "Receiver"
- Start typing the email(s) of the clinician user(s) in your clinic that you would like to add, then select user from the populated list
- Select "Assign"
- The clinician user(s) will receive email notification

#### **To Mark As New**

- Select the Shared Data tab
- Select "Incoming"
- Click the 3 dots next to the record to mark as new and select "Mark as New"

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Atkinson	Jacqueline	30 Aug 1977	Medic Assign Shared Data	
Armstrong	Matilda	13 Aug 1939	Assigned Medic No receivers have been assigned yet. Assign the first one.	
Abott	Jeremias	05 Dec 1960	Medic Assign New Optional	
Baker	Ingo	30 Mar 1947	Medic +2	
Campbell	David	03 Feb 1958	Medic Cancel Assign *2	
Duncan	Jessica	25 Mar 1953	Medicai meaiuri Ceriteri I Di Aug 2020 - +2 IMPORTED @	• •••
Davidson	Anna-Maria	11 Apr 1940	Medical Health Center 15 Jan 2023 - +2 IMPORTED ©	· •••
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Me	dical Center			Admin	Clinician	0	() (¢	JD
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	27 Apr 1956	Medical Health Center	08 Jan 2023	-		+2	NEW	
•	30 Aug 1977	Medical Health Center	17 Apr 2023	-		+2		
	13 Aug 1939	Medical Health Center	05 Jan 2023	mdoell@hosp	italmedi 🤇	-2	Import Data	
	05 Dec 1960	Medical Health Center	23 Dec 2023	jdoer@hospita	almedica 🥨	<u>+</u>	Mark as New	
	30 Mar 1947	Medical Health Center	27 Jan 2023	jdoer@hospita	almedica 🤇	►		
	03 Feb 1958	Medical Health Center	08 Jun 2023	-		+2		

### **To View Incoming Data**

- Select the Shared Data tab
- Select "Incoming"
- Select the record to view

mpedimed	Hospital Me	dical Center				Clinician	0	(i) (i	» 🕠
Patients Gro	ups Shared Da	ata <sup>2</sup> Analytics							
Incoming Out	tgoing	•							
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Anderson	Mattie	27 Apr 1956	Medical Health Center	08 Jan 2023	-		+2	NEW	
Atkinson	Jacqueline	30 Aug 1977	Medical Health Center	17 Apr 2023	-		+2		
Armstrong	Matilda	13 Aug 1939	Medical Health Center	05 Jan 2023	mdoell@hosp	italmedi 🤇	» +2	NEW	
Abott	Jeremias	05 Dec 1960	Medical Health Center	23 Dec 2023	jdoer@hospita	almedica 🤇	≥ +2		
Baker	Ingo	30 Mar 1947	Medical Health Center	27 Jan 2023	jdoer@hospita	almedica 🤇	» +2		
Campbell	David	03 Feb 1958	Medical Health Center	08 Jun 2023	-		+2		
Duncan	Jessica	25 Mar 1953	Medical Health Center	13 Aug 2023	-		+2	IMPORTE	D 💿
Davidson	Anna-Maria	11 Apr 1940	Medical Health Center	15 Jan 2023	-		+2	IMPORTE	D 💿
Earnheart	Henry	13 Apr 1956	Medical Health Center	10 Mar 2023			+2	IMPORTE	D (O)

# MYSOZO & SOZOAPP CLINICIAN Share Data Feature

### **To Import Incoming Data**

- Select the Shared Data tab
- Select "Incoming"
- Data can be imported from 3 locations
  - Shared data list
    - Click the 3 dots next to the record to import and select "Import Data"
  - Shared data patient dashboard
    - Select the record to view
    - Select "Import"
  - Shared data patient result
    - Select the record to view
    - Select a measurement date to view
    - Select "Import"
- Once Import has been selected you will be able to "Import as New" to create a new patient (patient doesn't already exist in your database) or select the patient who exists in your data to merge
  - To create a new patient
    - Click "Import as New"
    - Confirm patient information
    - Enter the patients MRN for your clinic
    - Click "Create"

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- To add shared data to an existing patient
  - Select patient from list on right
  - Select "Import"
  - Confirm patient info is the same
  - Click "Confirm" and then "Import"
- Note: All imported data will be indicated on the patient dashboard

impedimed	Hospital Me	dical Center			Admin	Clinician	0	()	0	JD
	ups Shared Da	ta <sup>2</sup> Analytics								
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Anderson	Mattie	27 Apr 1956	Medical Health Center	08 Jan 2023	-		+2	NEW		
Atkinson	Jacqueline	30 Aug 1977	Medical Health Center	17 Apr 2023	-		+2	•	$\mathbf{V}$	
Armstrong	Matilda	13 Aug 1939	Medical Health Center	05 Jan 2023	mdoell@hospi	talmedi 🤇	*2	Impor	t Data	
Abott	Jeremias	05 Dec 1960	Medical Health Center	23 Dec 2023	jdoer@hospita	almedica 🤇	*2	Mark a	as New	
Baker	Ingo	30 Mar 1947	Medical Health Center	27 Jan 2023	jdoer@hospita	almedica 🤇	*2			
Campbell	David	03 Feb 1958	Medical Health Center	08 Jun 2023	-		+2			
Duncan	Jessica	25 Mar 1953	Medical Health Center	13 Aug 2023	-		+2	IMPO	RTED	⊚ …
Davidson	Anna-Maria	11 Apr 1940	Medical Health Center	15 Jan 2023	-		+2	ІМРО	RTED	⊚ …
Earnheart	Henrv	13 Apr 1956	Medical Health Center	10 Mar 2023	-		+2	ІМРО	RTED	o

impedimed Hospital Medical Center	Admin	Clinician
Patients Groups Shared Data Analytics		
Coe, Jane DOB: 27 Apr 1956 MRN: -		
🕑 Import		
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DATE 🗘 BASELINE TAGS		
16 Mar 2023 17:05		
13 Feb 2023, 13:56		
7 Aug 2022, 17:27		
23 Dec 2022, 17:45		

