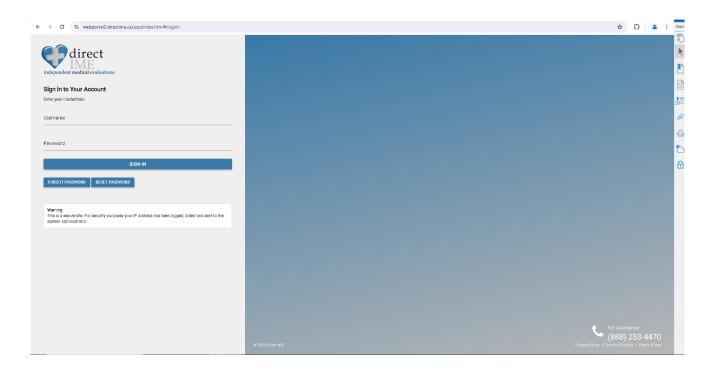


Web Portal Guide

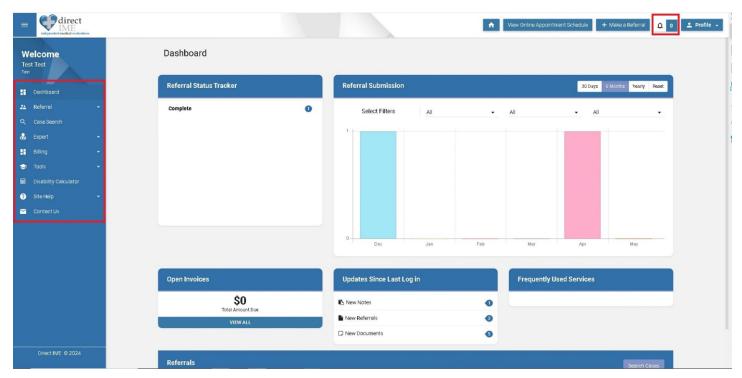
Setting up Portal Access

- 1. For each client requiring their personal portal access, provide the DIME team with the following information:
 - Full name:
 - E-mail address:
 - Phone number including extension (if applicable):
- 2. The DIME team will send a separate notification to each client asking them to create a unique username (your given e-mail address would be your initial username) and password.
- 3. Once the username and password are created, login to the portal.
 - Go to URL: https://webportal2.directime.ca/



Dashboard

When you log in, you'll see the dashboard's main page.

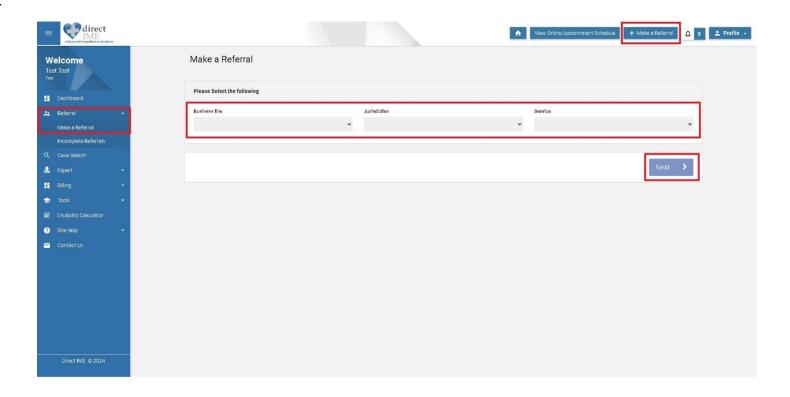


From here, you can choose which portal function you'd like to use, e.g. Make a reference, Case search, Disability calculator, etc.

The bell on the top right side will notify you of any communication not yet acknowledged, e.g. notification that a report is ready

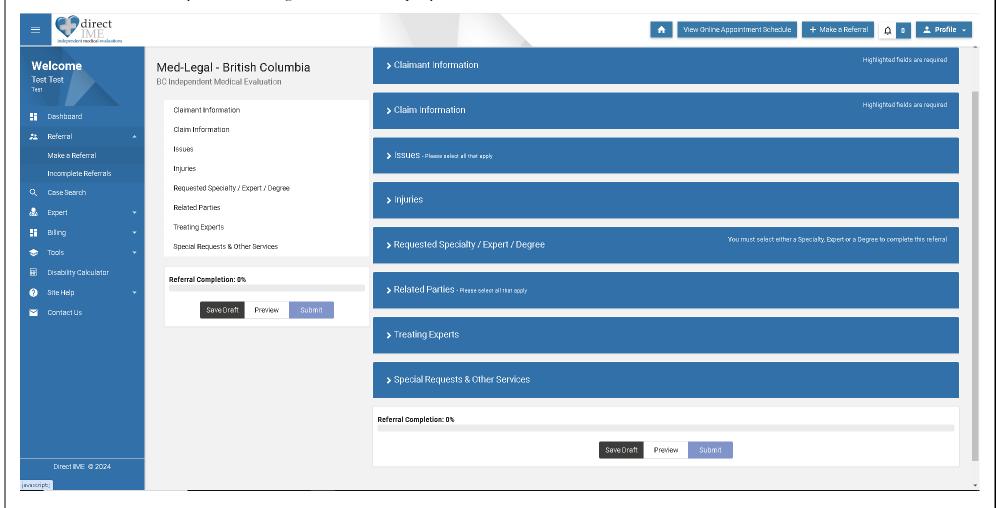
Create a new referral.

- 1. To start a referral, select the appropriate Business Line, Jurisdiction, and Service from the drop-down menus.
- 2. Click Next.



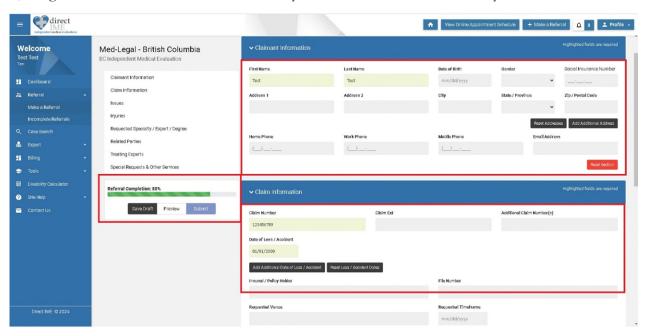
All sections are shown in the image below.

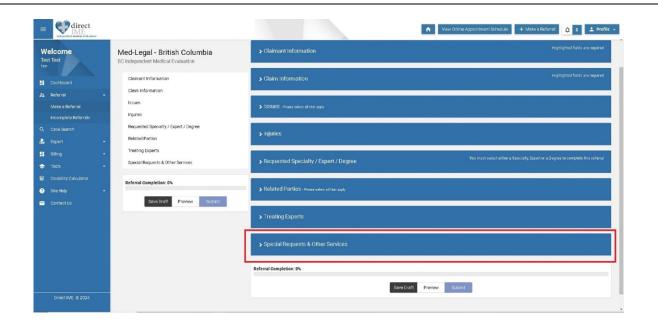
3. Click on each section as you scroll through the referral to input your information.

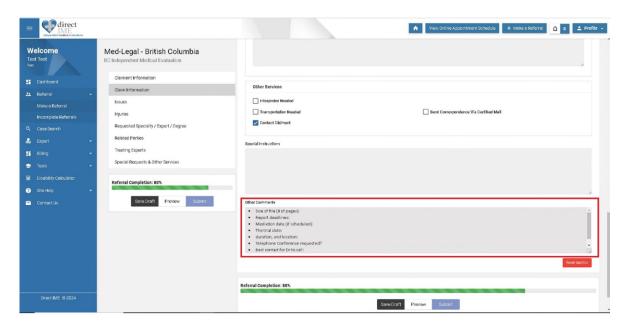


- 4. Add claimant/insured information.
 - While only highlighted fields in this section are required for referral submission, please try to provide as much information as possible.
 - The following information needs to be added to the Special Requests & Other Services Other Comments Sections: (without this information we may not be able to complete the booking)

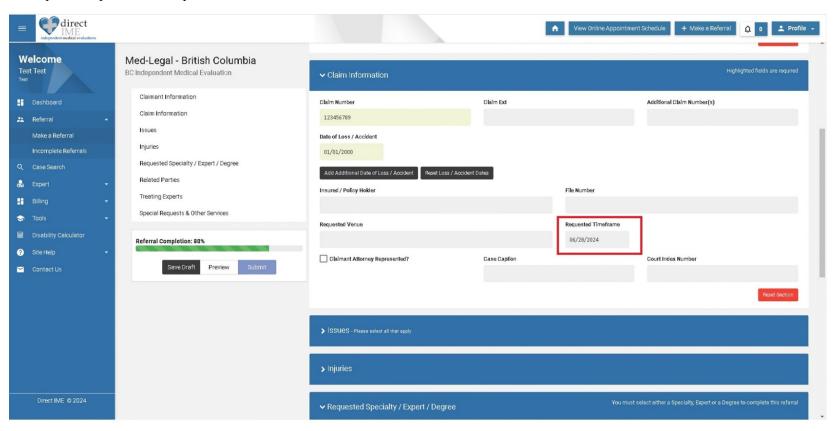
- Size of file (# of pages):
- Report deadlines:
- Mediation date (if scheduled):
- The trial date:
- duration, and location:
- Telephone Conference requested?
- Best contact for Dr to call:
- 5. Enter the claimant information in the highlighted fields.
- 6. Note that as you progress, the green bar on the left indicates whether you have added all the mandatory fields.

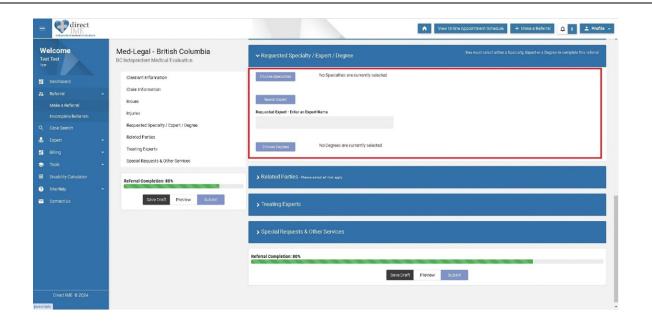


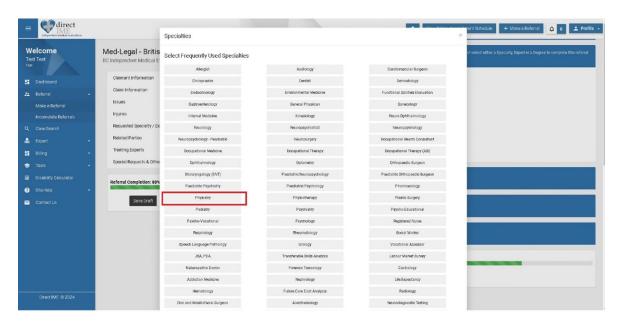


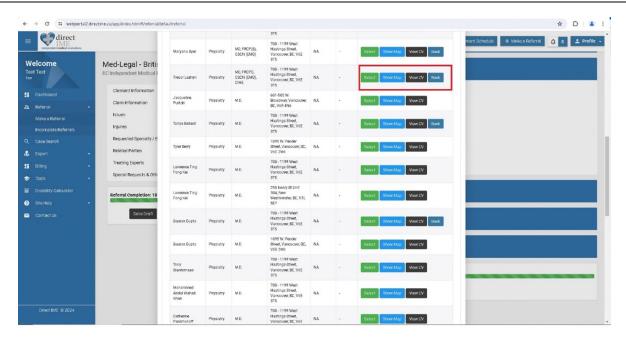


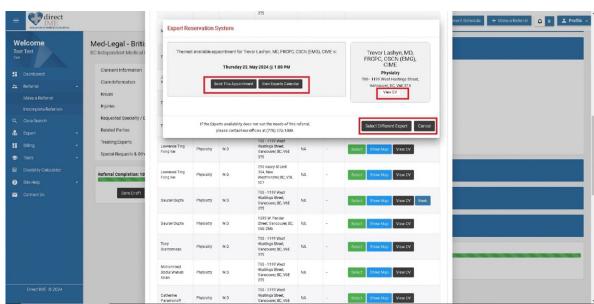
- 7. Click Timeframe From and Time frame To give a date range in which you wish to schedule the assessment.
- 8. Click Choose Specialties to see a drop-down list of specialty types and choose the type of specialist you wish to use for your assessment.
- 9. Choose your preferred time slot, download the CVs of the assessors, or select the assessor you wish to request availability from and our intake team will get back to you within 2 hours.
- 10. At the bottom of the page, add any special instructions.
 - For example: "Requires an interpreter."

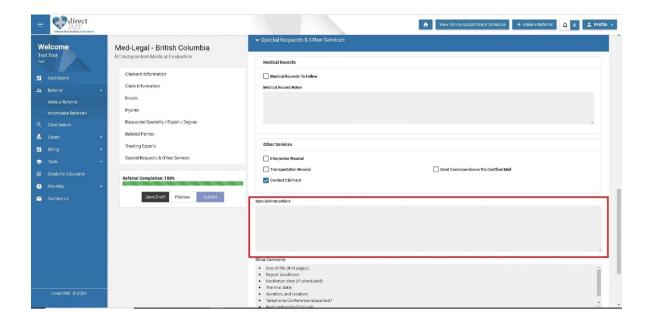




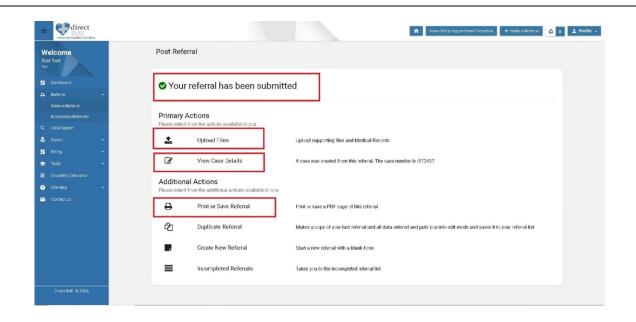


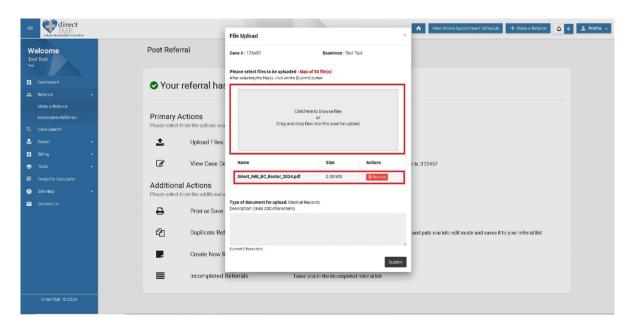


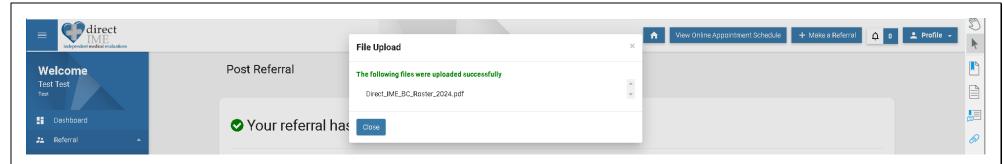




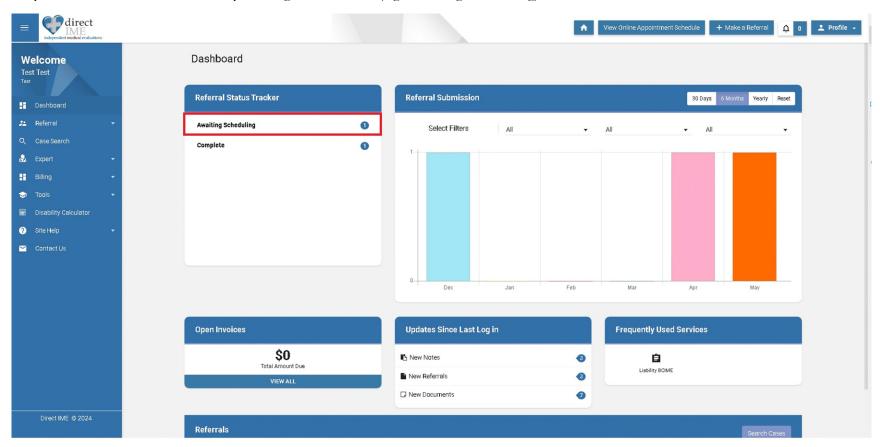
- 11. Then, submit the referral.
- 12. The confirmation page for your reference will appear automatically.
- 13. You can now choose to upload files, display referral details, print or save (PDF) a copy of the referral, etc.
- 14. Upload files by clicking on Upload files, browsing your files, or by dragging and dropping the file. Add the document description in the textbox below. Then click on Submit.
- 15. Confirmation of file upload is automatically provided.







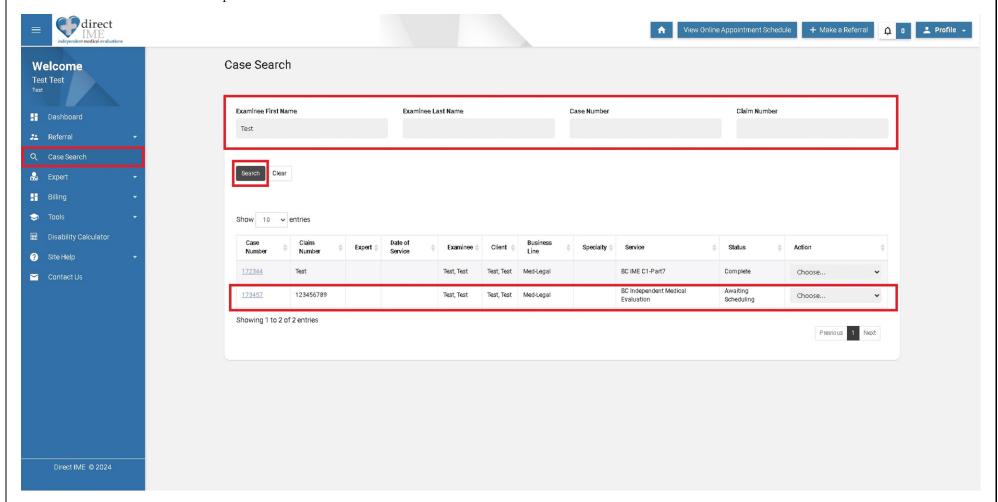
16. Review your dashboard and into cases by clicking on the status (e.g. Awaiting Scheduling) in Referral Status



Case search

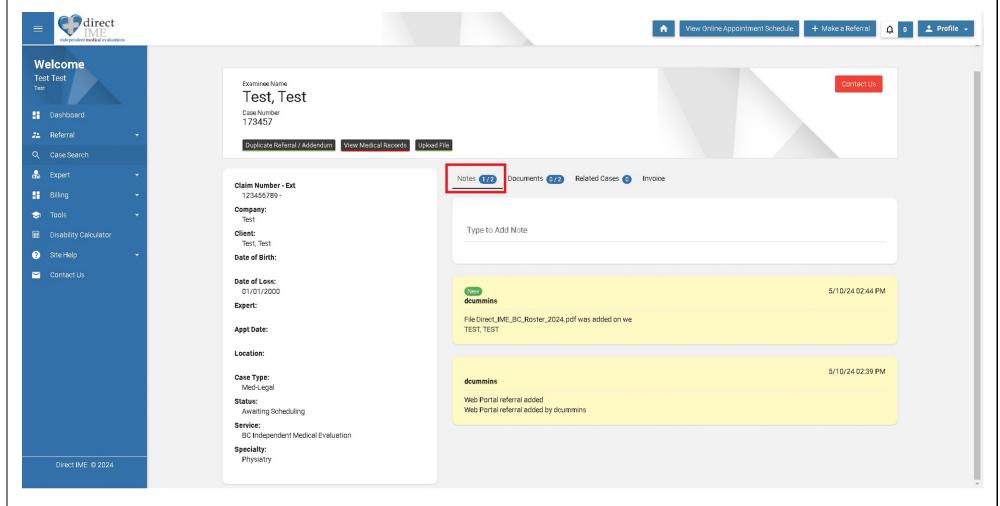
You can search for cases by first name, last name, case number, or claim number.

- 1. Click on Case Search, enter the information, and click on Search.
- 2. Click on the case number to open the case details.

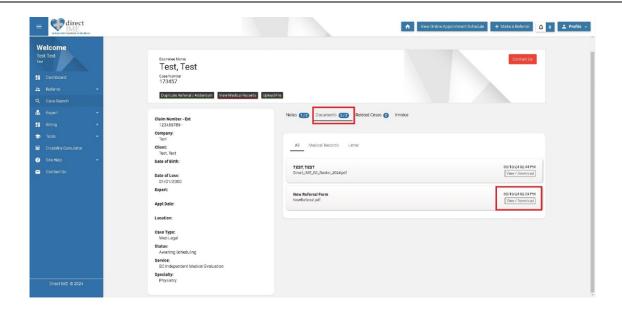


3. With case details open, you can add notes, and review notes to/from DIME (date and time stamped) by clicking on the yellow Notes icon.

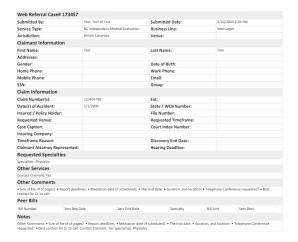
- 4. Notes are automatically filled in for important events, such as filing a document or submitting a request (see yellow fields).
- 5. Notifications (top right of screen) are visible inside the portal and are also sent by e-mail.



6. When the case details are open, you can view the documents created or downloaded for the case by clicking on Documents.

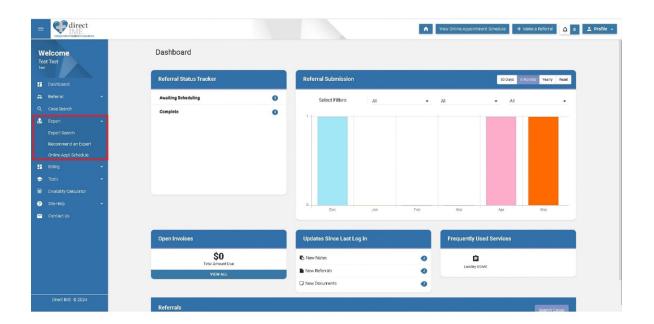


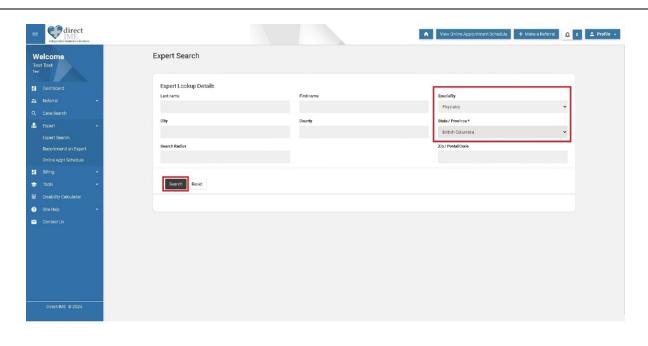
7. For example, if you click on View/Download the "New referral form" document, you will obtain a PDF version of the referral.

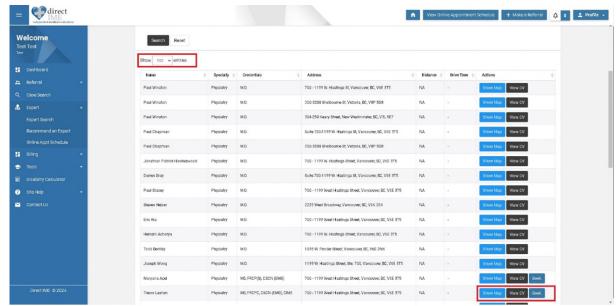


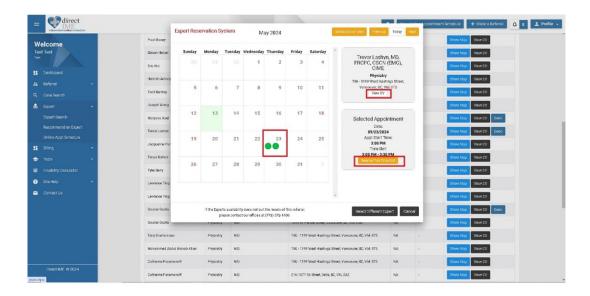
Expert Search

- 1. You can search for an expert, recommend an expert that you would like the DIME team to add to our roster, and you can search for all available assessors throughout the month.
- 2. Searching experts would require a minimum of 2 options to be selected e.g. Specialty and State / Province.
- 3. You can also search for experts by typing their first and last names, adding your desired address, and searching for an expert within a specific radius, by city and country.
- 4. We recommend selecting "Show -100 entries" for the best result.
- 5. You can then download any expert's CV, check the distance to the expert's office, and select the book option to find the assessor's current availability.
- 6. Once you find the availability that best suits your needs you can reserve that spot and our Intake team will send you the confirmation letters shortly along with any other details as required.

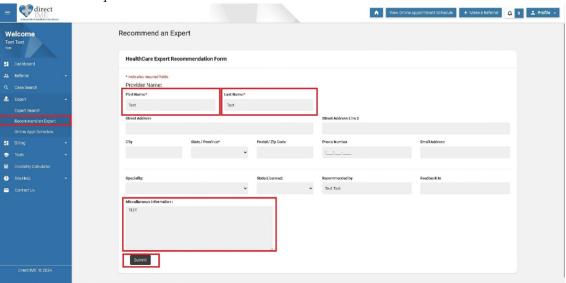




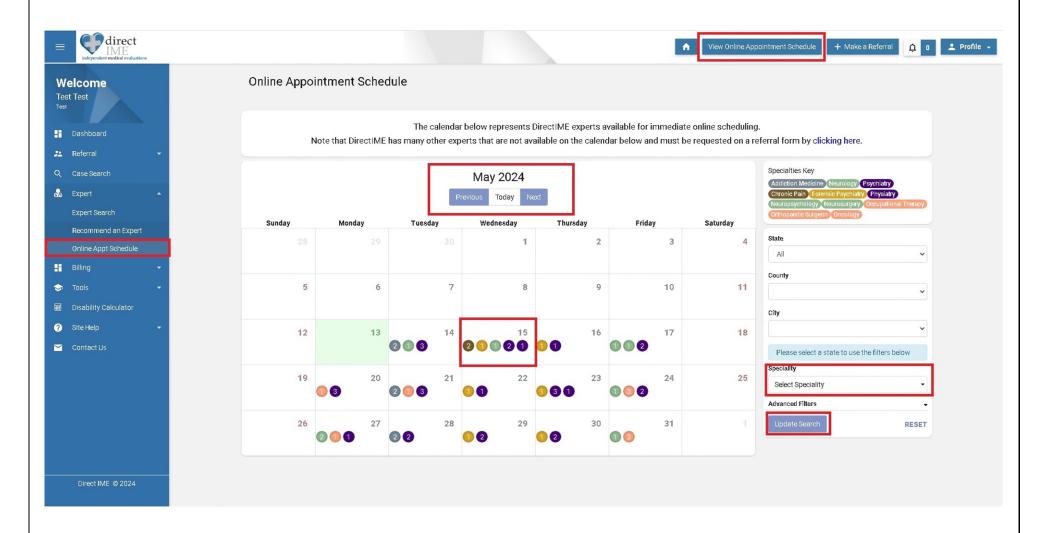


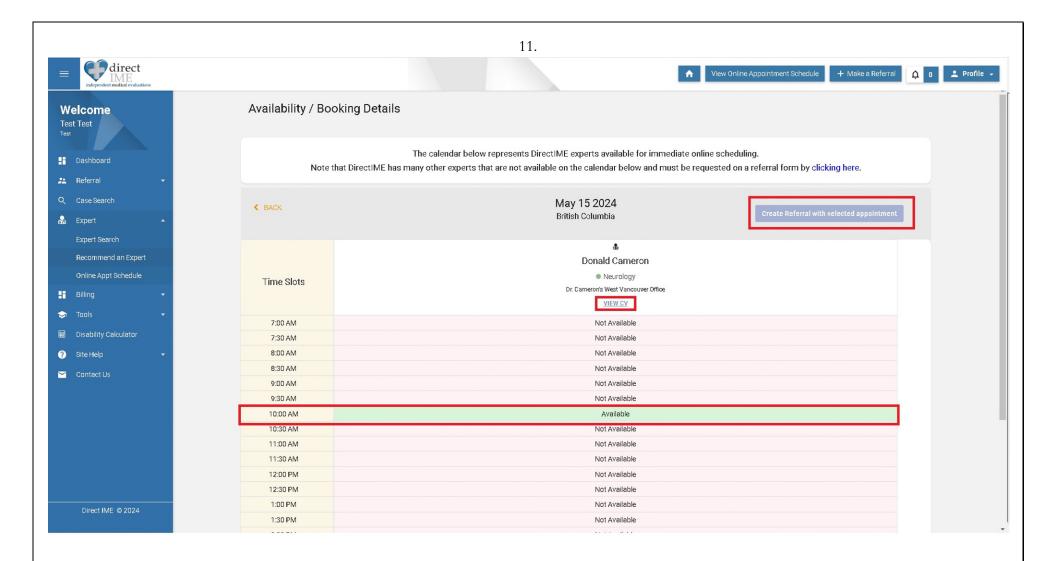


- 7. While recommending an expert, please provide as many details as possible for our team to onboard and reach out to your recommended assessor.
- 8. Minimum First Name and Last Name are required.



- 9. While you search all expert's availability on the monthly calendar, please make sure to select the specialty you are looking for and then go to the next month to see available appointment times with the expert.
- 10. You can navigate the Online Appointment Scheduler from either the top right menu bar or go to the Expert tab and select the 3rd option for the same.

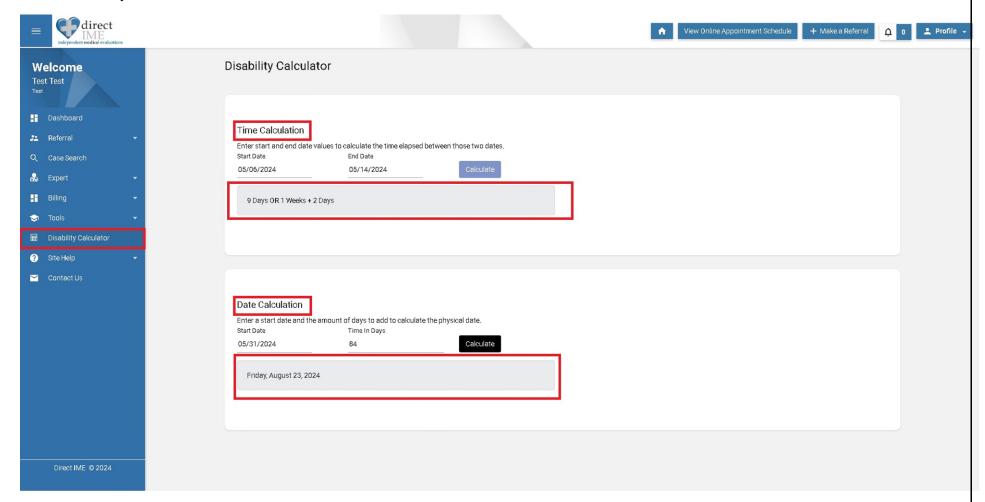




11. Once you find the best availability that matches your needs, you can send your referral directly by selecting the top right option and adding the file details.

Disability Calculator

- 1. The disability calculator can be used to find the days or weeks between the appointment time and estimated report turnaround time, to calculate the exact date according to the expert's cancellation policy etc.
- 2. The disability calculator is also used to calculate the service deadlines.



Notification preferences

DIME will automatically assign standard notification preferences to your profile.

- 1. You can change your notification preferences by editing your profile.
- 2. Notifications are set for email communication.

