
# Medly Dashboard Product Version 3.x

# Medly Messenger Product Version 1.x

# User Manual v10.0

# Medly Dashboard User Manual

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## Purpose

Medly is intended to support patients with Congestive Heart Failure. The Medly system consists of patient-facing applications (Medly Apps, including Medly Android and Medly iOS) as well as a clinician-facing dashboard (Medly Dashboard).

Medly is intended to help individuals self-manage their condition, improve communication between patients and clinicians, and to improve clinical management by monitoring and sharing health information. Data shared with their clinicians include weight, blood pressure, heart rate, symptoms, medication, and/or lab results. Medly interfaces with commercially available blood pressure monitors and weight scales to capture readings. Medly also allows patients to enter readings manually.

Based on personalized goal parameters the clinician has defined, as well as patient-reported symptoms and daily measures, the app provides automated feedback to the patient to promote self-management. The feedback may tell patients to contact the clinic, remind them to take a medication at a dose already prescribed by their clinician, or suggest they visit the Emergency Department.

Lets get started!

## Browser Requirements

Medly Dashboard & Messenger are optimized for the following browser:

- Google Chrome browser v60.0.3113.113 or higher.
    - Available at https://www.google.com/intl/en-CA/chrome/browser/

Medly Dashboard does not support Internet Explorer 8 (IE8).

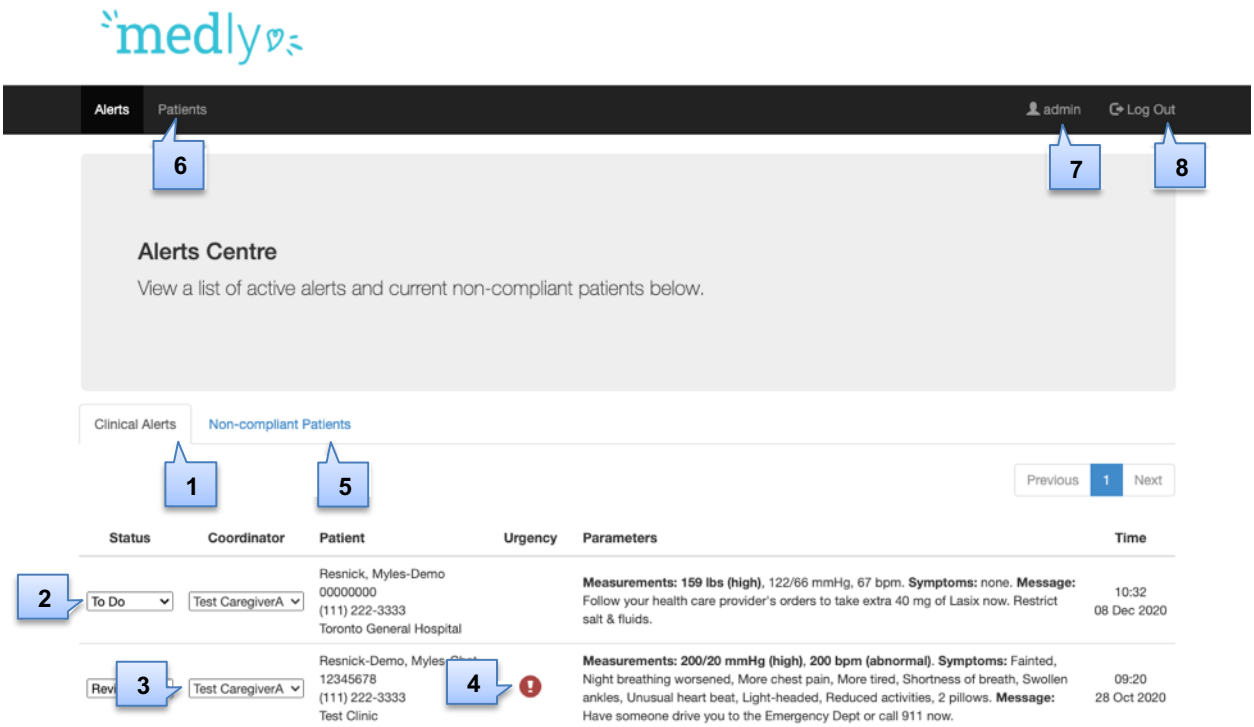
## 1. Login to your Account

1. On a web browser, navigate to Medly Dashboard.
2. Log in with your Dashboard user name and password.
    - If you have forgotten your password, see Section 7.2.1 for instructions on how to reset your password.

Once you are done using Dashboard, you should log out using the Log Out button at the top right of the screen.

## 2. Navigating Medly Dashboard

Once you login to Medly Dashboard, you'll see the Alerts Centre. This is the home page and will provide an overall view of patients that may require attention. From here, you can access all the key features of the app, shown below.




1. **Clinical Alerts** - Provides a list of all the patients with active alerts.

2. **List of active alerts** - Formatted as a task list; alerts can be marked 'To Do', 'In Progress', or 'Reviewed' to denote current review status.

3. **Coordinator Assignment** - A drop-down menu allowing patient alerts to be assigned between Coordinators to facilitate alert management.

4. **Urgency Flag** - A visual indicator denoting red state alerts.

5. **Non-compliant Patients** - Provides a list of patients that have not taken a full set of readings within a certain time period so that they can be appropriately contacted.

6. **Patients** - A list of patients that you have been assigned to as a caregiver; the patient summary can also be accessed from this page.

7. **Profile** - Your account information can be viewed and edited by clicking here.

8. **Log Out** - Click here to log out once you are done using Dashboar

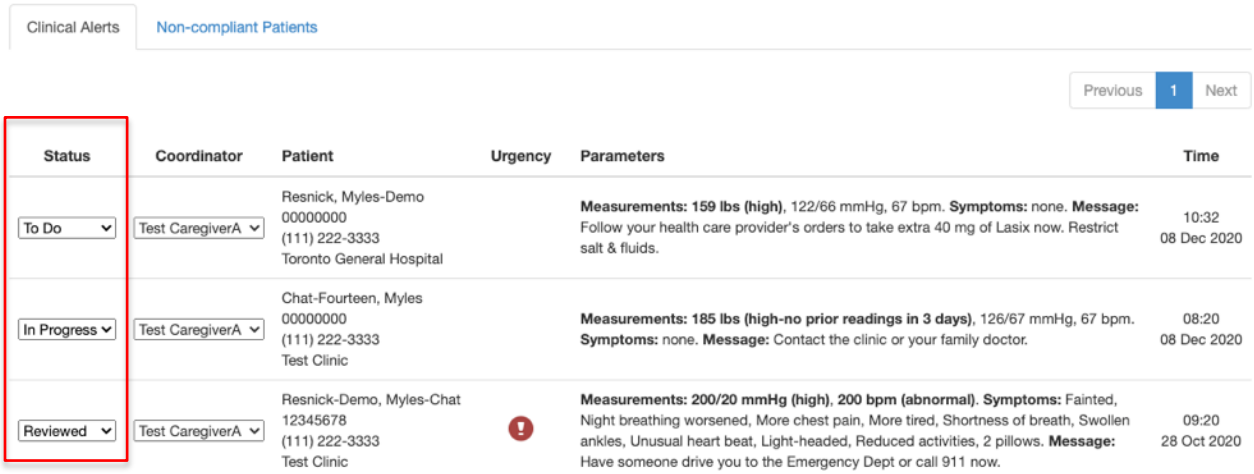
# 3. Alerts Centre

The Alerts Centre provides an overall view of all patients on Medly that require attention. This is done through two tabs:

- Clinical Alerts
- Non-compliant Patients

## 3.1 Clinical Alerts

Clinical Alerts are triggered by patients on the Medly applications. Each alert is listed chronologically by default, with the most recent alerts displayed at the top of the list.




The Clinical Alerts table is formatted as a task list. Clinicians are able to mark alerts based on their current review status as either 'To Do', 'In Progress', or 'Reviewed'. Alerts can also be assigned to specific clinicians, using the drop-down menu under the 'Coordinator' heading. If an alert is assigned to another clinician, it will show up in their alert centre; regardless of whether that clinician is on the patient's care team.

Once an alert is marked 'Reviewed', the text will turn grey and the reviewed alert will be removed from the Alerts Centre overnight. Urgent alerts are marked with a red exclamation point icon for quick identification.

Clicking on the alert will take you to the patient's summary page.

**CAUTION:** If you are not receiving email alerts, you can still log into Medly Dashboard to view all patient alerts. Contact your local Medly Administrator if you continue to not receive email alerts.

## 3.2 Non-Compliant Patients

The Medly Dashboard identifies patients who have not submitted a full morning reading set by 10am EST and updates the Non-Compliant Patients list accordingly. By default, Medly Dashboard also sends automated phone calls to these patients, however these may be disabled on a patient-by-patient basis (Section 4.2).

As such, the Non-Compliant Patient List helps identify patients who are not following the recommended frequency of readings (daily) so that they can be appropriately contacted. The list displays the timestamp of the last feedback message (i.e. the last time the patient triggered an alert) as well as the timestamp of the last call (if calls are enabled). The list is sorted by 'Last Feedback Message' in reverse chronological order, so the patients who have not been adherent for the longest time appear first.

Clinical Alerts | Non-compliant Patients

Previous 1 2 3 4 Next

| Patient | Last Feedback Message | Last Call |
|---|---|---|
| Yates, Ronald<br>7001317<br>(416) 134-1393<br>Hickle-Hansen | 11:24<br>18 Dec 2018 | 18 Dec 2018 |
| Appleton, Lauren<br>1234578<br>(647) 124-3333<br>Hickle-Hansen | 08:25<br>3 Dec 2018 | 18 Dec 2018 |
| Smith, John<br>373829128<br>(647) 789-2242<br>Hickle-Hansen | 09:25<br>1 Dec 2018 | calls disabled |

It is important to exercise caution when disabling adherence calls for a given patient. While they will continue to be displayed in the Non-Compliant patients list if deemed non-adherent, they will receive no reminders directly.

**CAUTION:** Adherence calls will help remind patients to take their daily readings. If adherence calls are disabled or if you'd like to follow up with the patient, please log in to Medly Dashboard to check their status or contact the patient directly.

# 4. Patients

The Patients page displays all patients from who you have been assigned as a caregiver and lets you view all of their Medly data (physiological data, symptoms, alerts, medications, test results).

## 4.1 Adding Patients

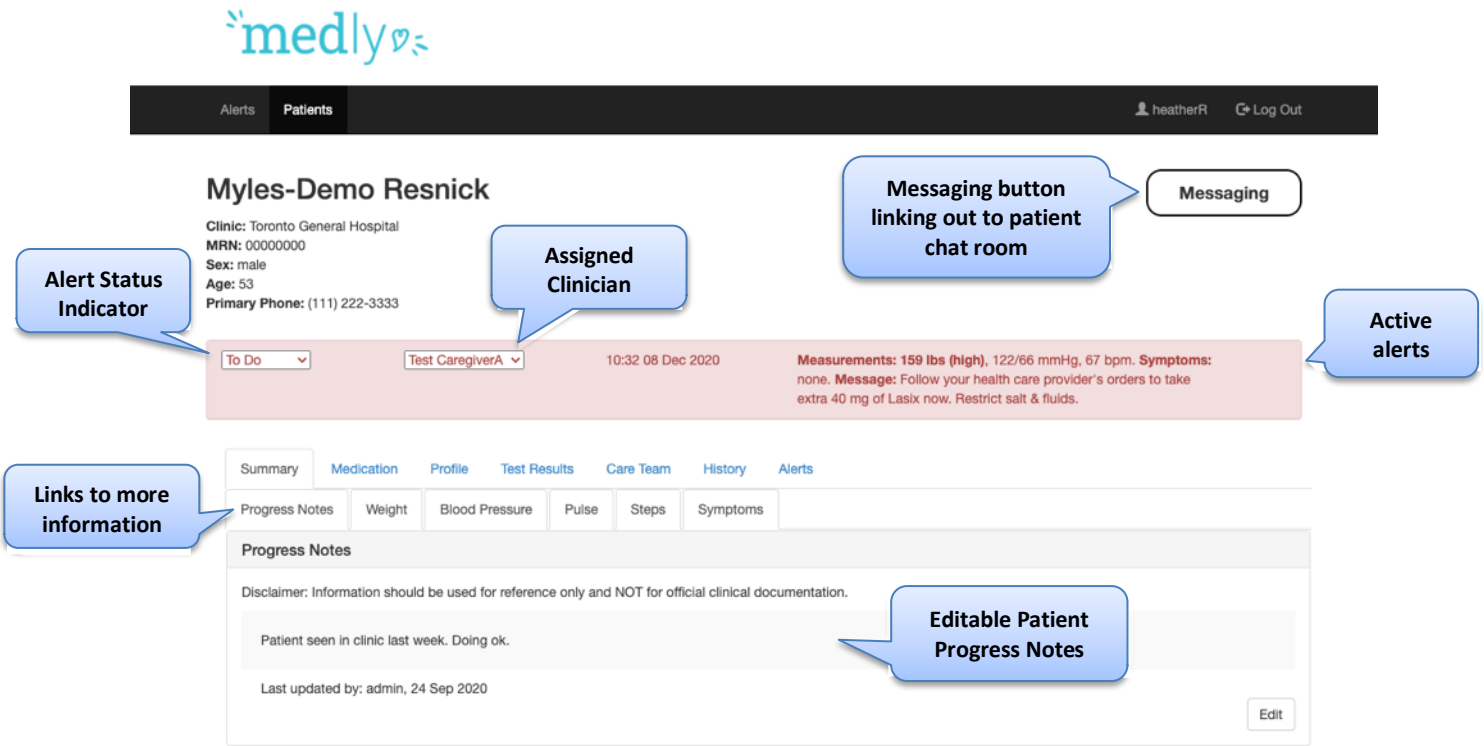
To create a new patient account, select Add New Patient. All fields marked with a red asterisk are required to proceed with account creation. See Section 6.1.1 for more information.

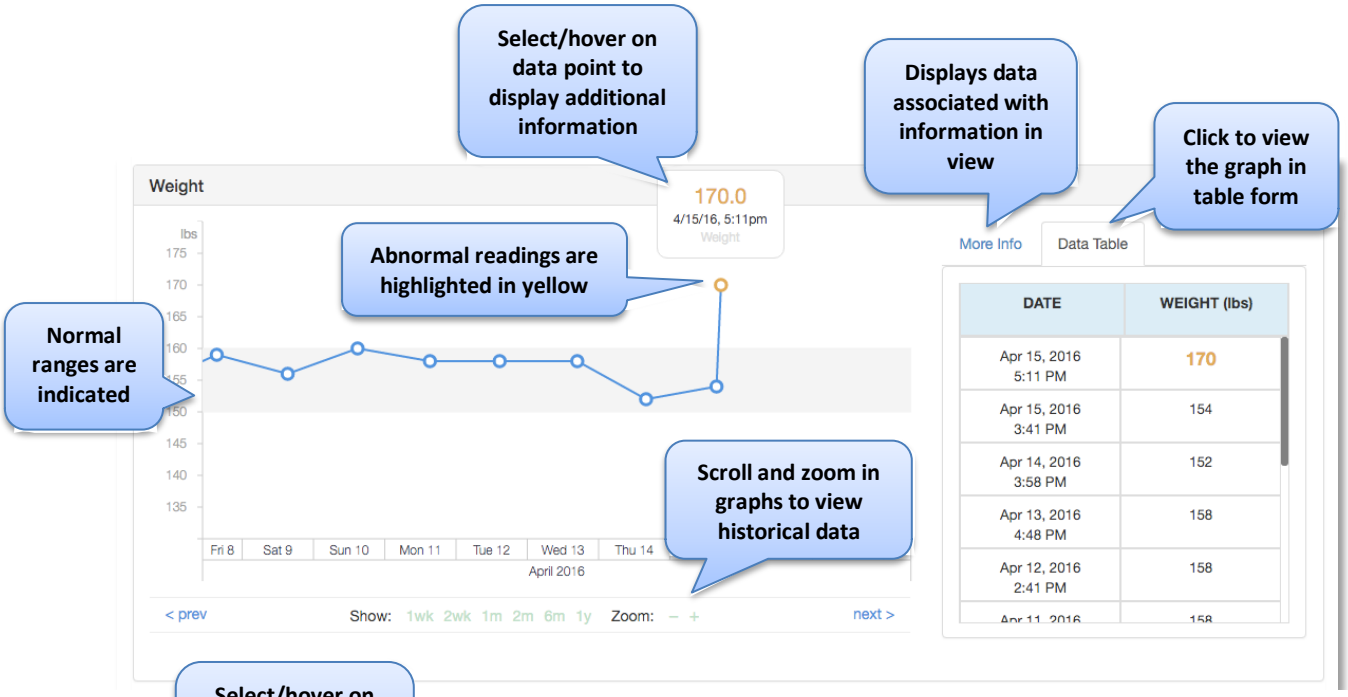
## 4.2 Viewing Patient Summary

Click on the **patient's name** to view the **Patient Summary**.

If the patient has an active alert, it will appear at the top of the patient page.

The patient's information from the last 3 months will be displayed on the graphs and tables of the Summary page. This may include Weight, Blood pressure, Pulse, Symptoms, and/or Steps. The patient's lab results, medications, care team, demographic information, and alert history are also accessible from the Patient Summary; along with Progress Notes which can be modified by any care team member.







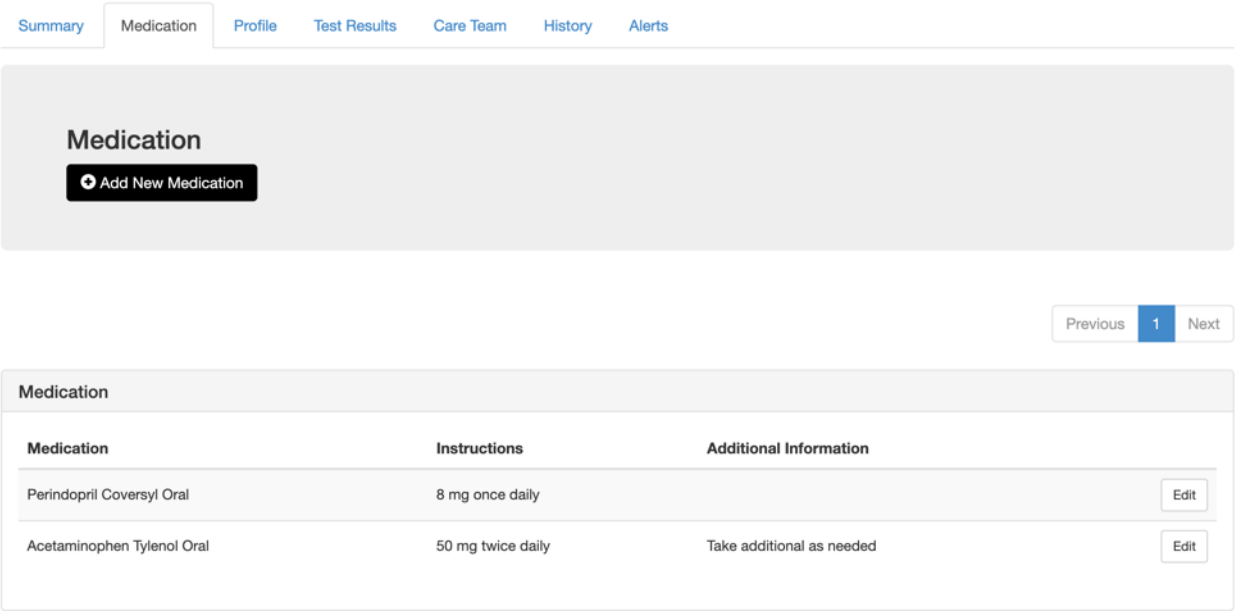
**CAUTION:** Readings and alerts will only appear in Medly Dashboard after patients have completed their readings and sent their data. If you still suspect there are incorrect or missing data, or incorrect messages in Medly Dashboard, please contact your local Medly Administrator.

### 4.2.1 Medication

Click on the **Medication** tab under the patient's page.

The date and time the list was updated is displayed at the top of the page. The patient medication list includes baseline medication instructions and any additional information.

For defining medication instructions that are part of alert messages, see section 6.1.1.

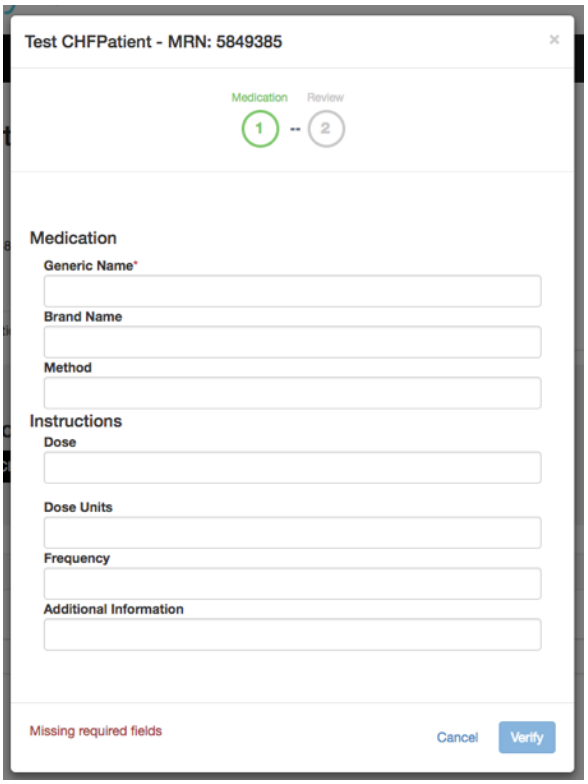



#### *4.2.1.1 Adding Medication*

Medly Dashboard allows clinicians to track the patient's medication.

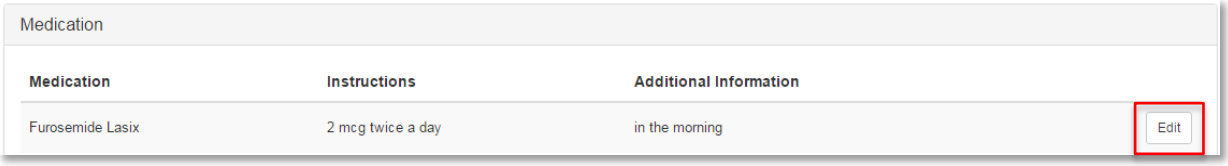
1. In the Medication tab under the patient's page click on the 

button **to add a new medication for the patient.**
2. Enter the required fields in the pop-up window and follow the instructions.



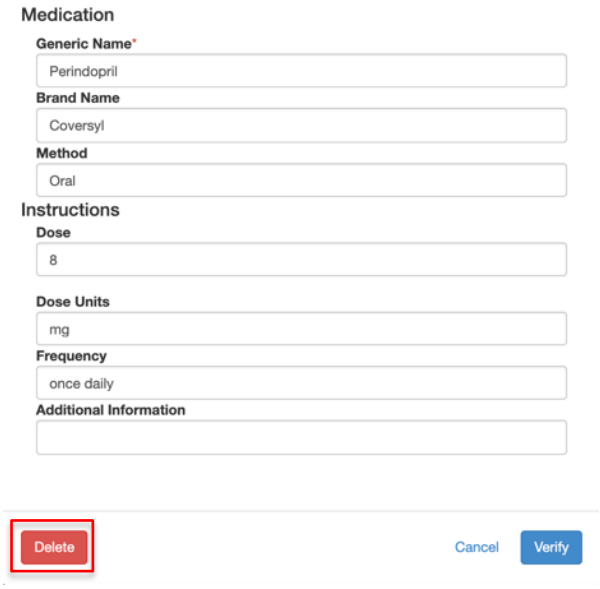

### *4.2.1.2 Viewing, Editing or Deleting a Medication*

1. If you would like to delete a medication or change the details of the medication you have saved, click on the "**Edit**" button beside the medication and make the changes you want in the pop-up window.




2. If the patient is no longer taking the medication and you would like to delete it from the Medication list, press the "**Delete**" button in the pop-up window.

**Note**: If you delete a medication, you will not be able to retrieve the information at a later time.

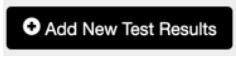



## 4.2.2 Test Results

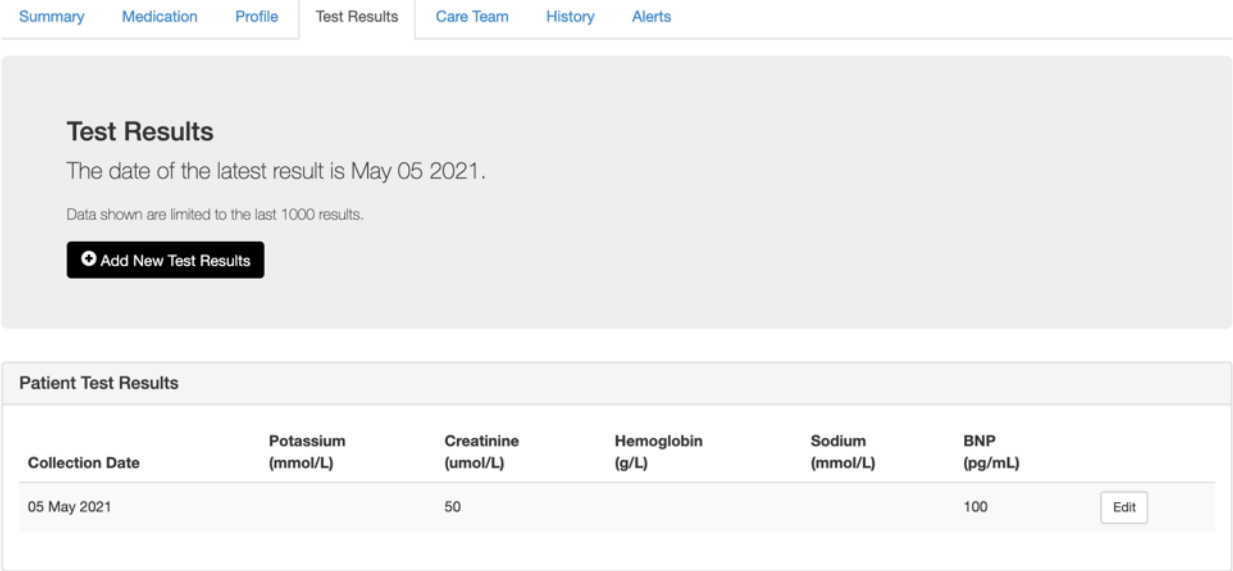
### *4.2.2.1 Viewing and Adding Patient Tests*

UHN patient test results are pulled automatically from the UHN Non-Operational Data Repository (NODR) every 12 hours or entered in manually. Note that lab results are not automatically pulled for non-UHN patients, or UHN patients who had their lab tests conducted outside of a UHN hospital.

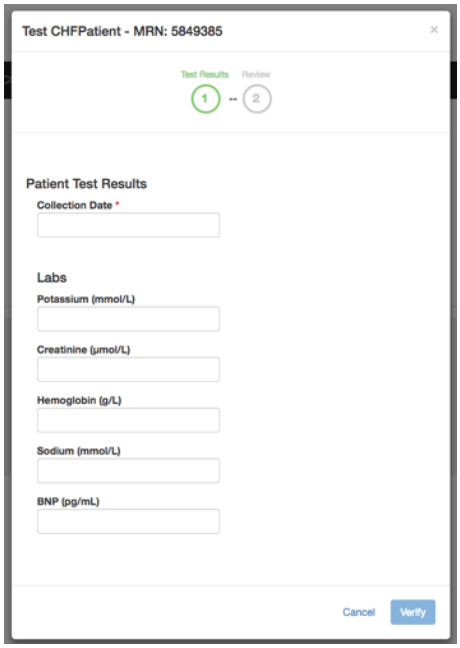
To add new test results manually:

1. Click on the **Test Results** tab under the patient's page.
2. Click on the 

button.



3. Enter the required fields in the pop-up window and follow the instructions.



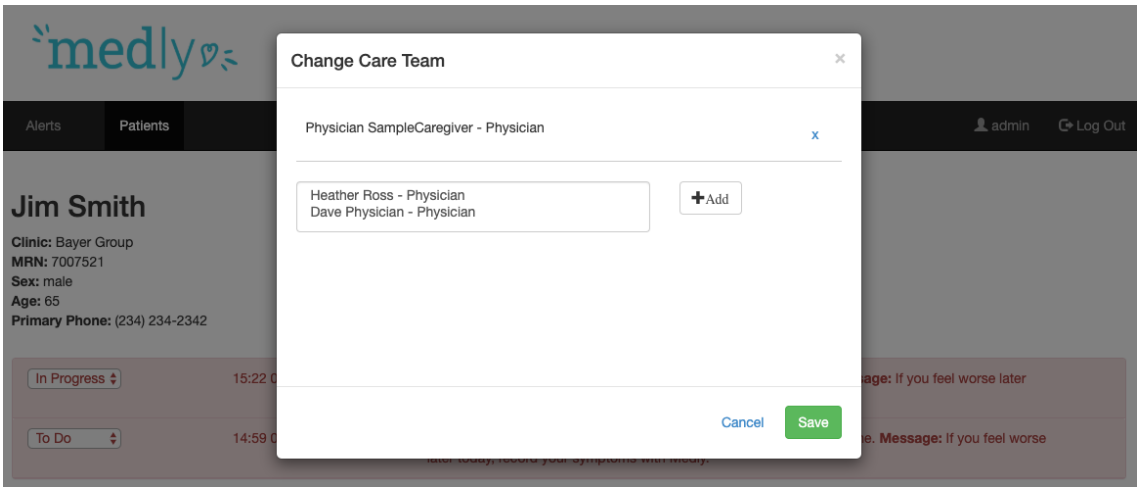

### 4.2.3 Patient Care Team

The Patient Care Team includes all the caregivers who are linked to that patient's care. Caregivers represent the clinican users of Medly Dashboard. Clinicians need to be linked with a patient in order to access their information and receive any associated alerts; this is done by adding their caregiver account to the patient's care team.

1. Click on the **Care Team** tab under the patient's page to display the members of the patient's care team.
2. To modify the care team (add or delete), click on the **Edit Care Team** button.
3. To add a care team member, select a caregiver from the dropdown list and click **Add**.

   **Note:** If the caregiver is not in the dropdown menu, please add them to the caregiver list (see instructions in Section 5.1).
4. To remove a care team member, click the **X** beside the caregiver you wish to remove.
5. Once you are ready, click **Save**.

**Note:** Caregivers are displayed in the order they were added to the care team.

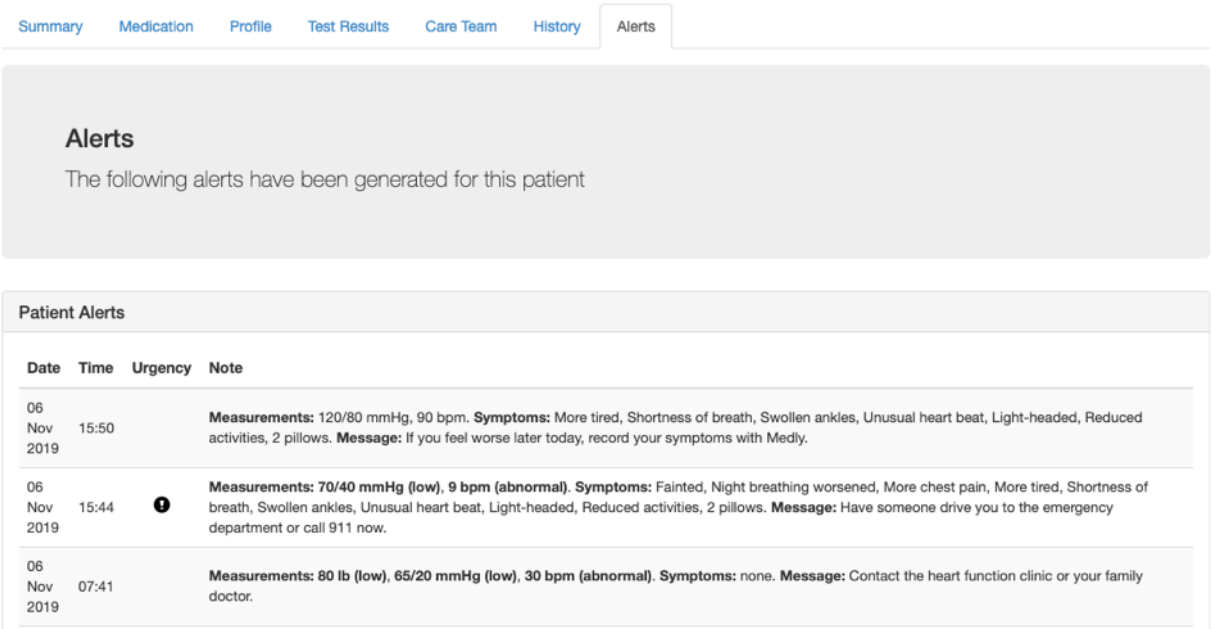



### 4.2.4 Dismissing Alerts

Alerts can be triggered when a patient's data indicates that they may be experiencing worsening readings or symptoms, e.g. high blood pressure.

When this occurs, the patient's page will show an alert at the top of the page.

1. To dismiss an alert, click the status dropbox and select 'Reviewed'. The alert will grey out. Every day at 12am EST, all reviewed alerts are removed from the page.
2. To view the full history of Alerts, click on the Alerts tab on the patient's page. On this page you can see the full history of the alerts that have been triggered for the patient.



## 4.3 Patient Account Management

Patient accounts may be managed from the **Profile** tab of the Patient Summary. Within this section, clinicians can edit a patient's General Information, Contact Information, Login Information, Patient & Goal Parameters, Activity Tracker, as well as Activate/Deactivate patient accounts.

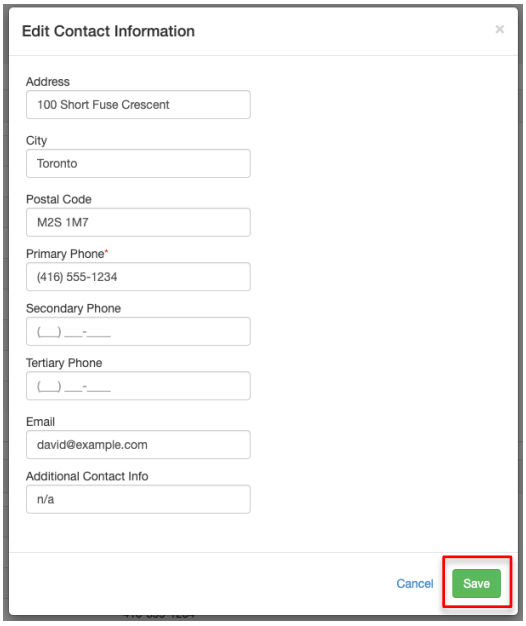
### 4.3.1 Editing Patient Information & Parameters

The Profile section contains editable patient information, divided into 6 categories:

1. **Information**: General patient identifier information. Includes MRN, OHIP, Name, Birthday, Age, Se, and Clinic.
2. **Contact Information**: Address, phone and email information. It is recommended that a phone number and email address are collected from all patients to ensure an up-to-date distribution records are maintained.
3. **Login Information**: Username and password. This information is set during account creation. This section can also be used to reset a patient's username and/or password if they have forgotten their credentials.
4. **Patient Parameters**: Patient-specific Medly parameters which affect how they interact with the smartphone application and whether they receive adherence phone calls.
    a. Patient adherence phone call reminders are enabled: If checked, this setting will trigger a phone call to the patient's Primary Phone (listed in Contact Information) at 10am every day if their readings have not been received by Medly Dashboard by that time.
    b. Patient has ICD: When checked, the question "Has your ICD gone off?" is added to the patient's daily CHF symptoms questionnaire.
    c. Patient has LVAD: When checked, the questions "Have you had any LVAD alarms?", "Is your stool darker or is there blood in your stool?", and "Is there redness or new drainage at your driveline site?" are added to the patient's daily CHF symptoms questionnaire.
    d. Patient takes medication on weight gain: When checked, the included copy will be displayed to the patient if an alert is triggered for a high weight (either above the Max threshold or the day-over-day delta threshold). This copy can be edited by typing in the free-text box and selecting Save.
5. **Goal Parameters**: Patient-specific Medly parameters which determine when a patient will trigger alerts within the Medly application.
    a. Urg Low: Currently only applies to Systolic Blood Pressure. Readings entered below this value will always result in a red alert being triggered.
    b. Min: Readings entered below this value will always trigger an alert, for which the severity depends on the remaining readings as well.
    c. Max: Readings entered above this value will always trigger an alert, for which the severity depends on the remaining readings as well.
    d. Max delta value between readings: Currently only applies to Weight Readings. The value is used in the algorithm to compare the previous weight (taken within 3 days) to today's weight. If the difference in these weights is above this value, an alert will always be triggered.

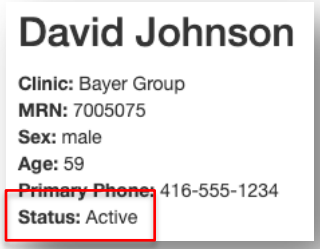
6. **Activity Tracker**: Optional ability to link a FitBit account to a patient's Medly account in order to view this patient's step data from within Medly Dashboard.

To edit any of a patient's information or parameters, select the Edit button in the upper-right corner of a given section. This will trigger a pop-up modal for the given section. After editing a specific field, select Save to confirm the changes. The modal will be dismissed and the changes will be saved to the patient's account.




### 4.3.2 Deactivating and Reactivating a Patient

After a patient is created, they are automatically added as an Active patient. This can be confirmed by viewing the patient information at the top of the Patient Summary.




During the offboarding process, patient accounts in Medly should be Deactivated. To deactivate a patient, navigate to the Profile tab within the Patient Summary page, and select Deactivate User. A confirmation prompt will be displayed advising of the changes which will be applied to the patient's account if the action is confirmed. These changes are as follows:

- Display patient status as **Deactivated** within the patient information at the top of the Patient Summary
- Log the patient out of Medly (if currently logged in)
- Prohibit the patient from logging into Medly in future
- Prevent adherence phone calls
- Prevent new lab results from automatically syncing
- Prevent adherence status from being displayed in non-adherent tab
- Prevent alerts from being displayed in alert centre
- Display the patient name with strikethrough in the patient list

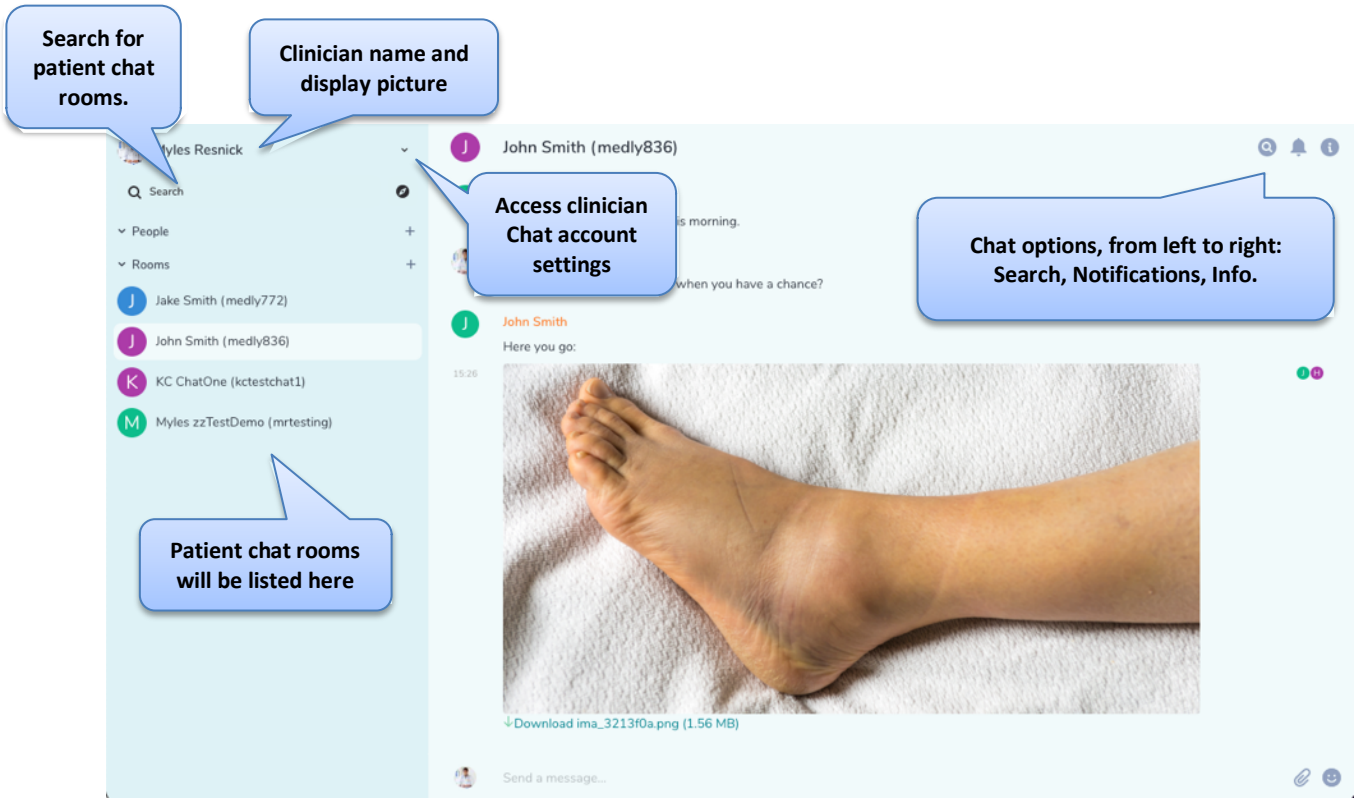
After a patient is deactivated, they will still be accessible by any clinician who is listed on their care team. If the patient subsequently re-enters the Medly program, they may be re-activated by returning to the Profile tab within the Patient Summary page, and selecting Activate User . A confirmation prompt will be displayed advising of the changes which will be applied to the patient's account if the action is confirmed. These changes are as follows:

- Display patient status as **Active** within the patient information at the top of the Patient Summary
- Allow the patient to log into Medly
- Allow adherence phone calls
- Allow new lab results to automatically sync
- Display adherence status in non-adherent tab
- Display alerts in alert centre
- Display the patient name without strikethrough in the patient list

After a patient is reactivated, they will be able to continue using Medly normally. Furthermore, all caregivers will receive email notifications for new alerts as they normally would.

# 5. Medly Messenger

Medly Messenger allows patients and their assigned Medly care team to securely share text and image messages with one another. You can access a patient's chat room by clicking the **Messaging** button in the upper-right corner of a patient's profile. After a short loading period, Medly Messenger will be opened in a new tab. If you are not logged in already, you will be prompted to log in to Medly Messenger before being taken to the patient's chat room. You can also access Medly Messenger at any time by navigating directly to https://messenger.medly.ca/.




**CAUTION:** Usage of Medly Messenger should be limited to communication related to the patient's condition, and is intended to supplement the existing Medly alert system and not serve as a mechanism for formal virtual visits.

## 5.1 Logging into Medly Messenger

You may log in to Medly Messenger using the same username and password that you use for Medly Dashboard. If you have forgotten your password, you may reset it using the instructions provided in section 7.2.1.

After logging into Medly Messenger for the first time, it is highly encouraged to attach a display picture, to better allow patients to identify their clinicians while chatting.

### 5.1.1 Log-In Process

After logging into Medly Messenger for the first time, you may be prompted to set up additional security measures. It is recommended that you set up a security phrase and copy a secure back-up of your security keys if prompted to do so.

On subsequent log-ins, you may be prompted for these security measures or to "Verify this login". **It is not necessary to complete this process in order to gain access to your Medly patient chat rooms.** Please select the red Skip button (Skip), followed by the red Skip text ( Skip ). You will then be taken to your patient chat rooms.

The security measures which are skipped are used for a type of encryption that is not required by Medly Messenger. All communication between you and your patients are otherwise performed over secure channels.

Depending on the browser you are using, you may also be prompted to enable notifications once you have successfully logged in to Medly Messenger. It is recommended that you **choose to enable notifications** in order to receive push notifications when a patient sends you a message.

### 5.1.2 Attaching a Display Picture

You are encouraged to attach a display picture, to facilitate communication with your patients.

1. Click the arrow to the right of the clinician name in the left-hand sidebar and select 'All settings' to access account settings.
2. Under 'General', scroll to 'Profile'.
3. To the right of 'Display Name', select 'Upload' beneath the grey user image.
4. Select a photo of yourself and select upload/attach.
5. Select 'Save' beneath the 'Display Name' field.

### 5.1.3 Sorting Patient List

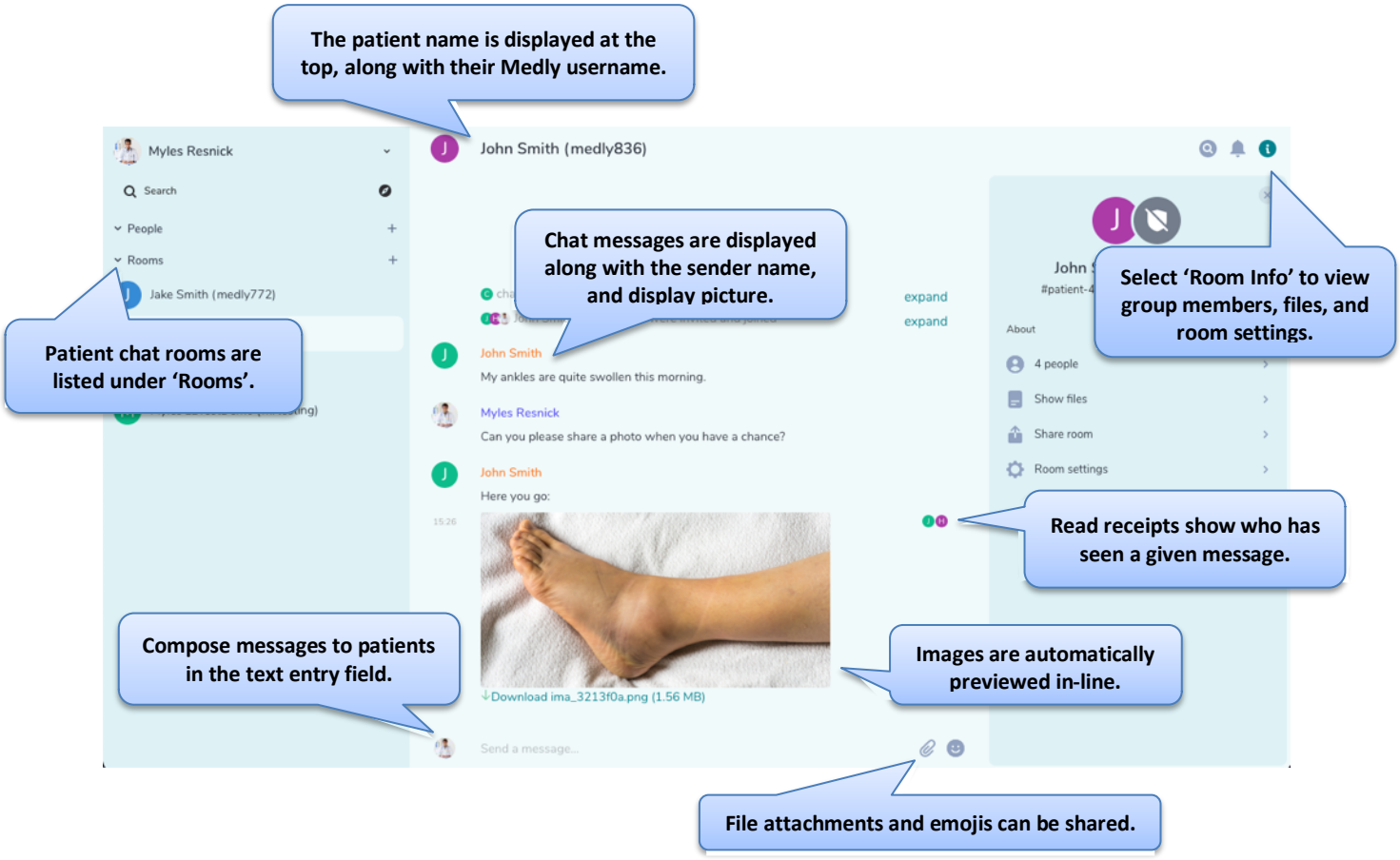
By default, the patient list (available under the 'Rooms' header in the sidebar) is sorted alphabetically. It is recommended that you change this to sort by recently active instead.

1. Hover over 'Rooms' and select the three dots for 'List Options' ··· List options
2. Select 'Activity' under the 'Sort by' header to sort the list by the most recently active patients.
3. Under appearance, you may toggle the following options:
    a. To ensure rooms with unread messages remain at the top of the list, check the box next to "Show rooms with unread messages first".
    b. To show previews of the most recent message in the chat, check the box next to "Show previews of messages".

## 5.2 Communicating with Patients

Once you have access to your account and have completed the initial account setup, you may begin sharing messages with your patients.

You can find a list of all patient chat rooms you have been invited to in the sidebar on the left-hand side of the screen, under the 'Rooms' header. Medly Messenger is integrated with Medly Dashboard, so **you will be automatically invited to a unique chat room for each of your patients**. Patient chat rooms include all clinicians who are a member of that patient's care team in Medly Dashboard, and chat messages are visible to all members of the chat room.




If a patient of yours is not listed in Medly Messenger, please navigate to the patient's profile in Medly Dashboard and select the 'Messaging' button. This will trigger the system to re-connect this patient.

To chat with a patient, select their name under the 'Rooms' list in the sidebar. This will open their chat room. To compose a message, select the text entry field at the bottom of the screen. To send a message, hit 'Enter/Return' on your keyboard to share the message with the patient. To send an image, hit the attachment icon to the right of the text entry field. This will open a file browser, from which you can navigate to the file of

choice and share this with the patient. At this time, only images are fully supported; **sharing of other documents is strictly prohibited**.

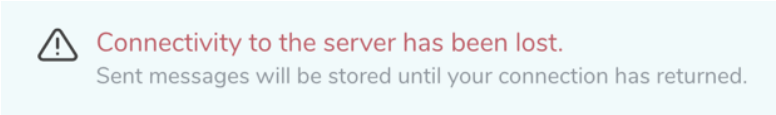
**CAUTION:** Clinicians should never use Medly Messenger for any of the following purposes:

- Asking for passwords of any kind.
- Asking for financial (banking, credit card, etc.) information of any kind.
- Asking for personal health information (PHI) relating to patients other than the Medly user.
- Sending prescription refills.

**CAUTION:** Urgent and sensitive information should not be shared through Medly Messenger. Please contact the patient over the phone to share sensitive information.

### 5.2.1 Outages

It is possible that the Messenger server may encounter issues. If the Messenger server is down, you will not be able to send or receive messages from patients. An error message will be displayed at the bottom of the chat window to inform of the outage. If the Messenger server has lost connection, please check your internet settings. If you have an active internet connection and continue to see this message, please contact your local Medly Administrator or Medly Support.




Similarly, outages may impact the patient's ability to share messages with their care team. Alternatively, it is possible that the Medly server is active, while the Messenger server is down; which may lead to a situation where a patient's Medly readings have been shared to Dashboard, but their chat messages have not. If you suspect there are incorrect or missing chat messages, please contact your local Medly Administrator or Medly Support.

# 6. Administrative Tasks (Medly Dashboard)

Some administrative tasks can only be completed when logged into Medly Dashboard as an administrator or super administrator.

## 6.1 Add a New Account (Administrators only)

To add a new patient, caregiver, clinic, or administrator (super administrator only), click on the **Add New** button under each of the respective sections (e.g. click Add New Patient when you are in the Patients section to add a new patient). Fill in the information in the pop-up window. Required fields are marked with a red asterisk (*).

### 6.1.1 Patients

In addition to administrators, clinicians may also add patient accounts. When creating a new patient, note that:

- The patient's email information is used for reference only. They will not receive any automated email communications.
- The patient username and password is used to sync data from the Medly mobile applications with the Medly Dashboard.
- Parameters can be customized for each patient, which will determine how the alerts are generated for the patient in the Medly mobile application. For example, checking off "Patient takes medication on weight gain" and completing the associated field will enable medication on weight gain alerts for the patient.

### 6.1.2 Caregivers

As an Administrator, you can view all caregivers and manage their accounts.

When creating a new caregiver:

- The email saved for the caregiver is where they will receive any relevant patient-related emails and alerts; please enter a valid hospital-issued email address.
- The new username must not already exist in the system.

### 6.1.3 Clinics

This page provides a list of the clinics involved with Medly. Information about the selected clinic will be viewable to the patient, including the clinic phone number.

### 6.1.4 Manage Administrators (Super Administrators only)

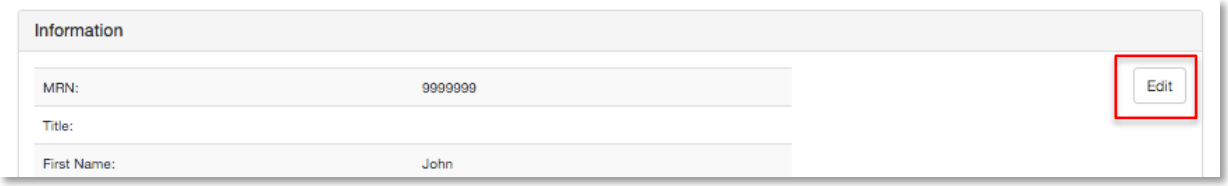
Only Super Adminstrators have the ability to manage Medly Dashboard adminstrators. This is done through the Adminstratrors page. If a change is required, contact your local Medly Administrator or Medly Support.

**Note:** Adminstrators can view, create and edit all caregiver and patient accounts on Medly Dashboard.

## 6.2 Edit Profiles

Profiles can be edited by clicking the **Patient's name**, **Username**, and **Caregiver's name** (Administrators only). You will be directed to a profile page where you can **Edit** information.

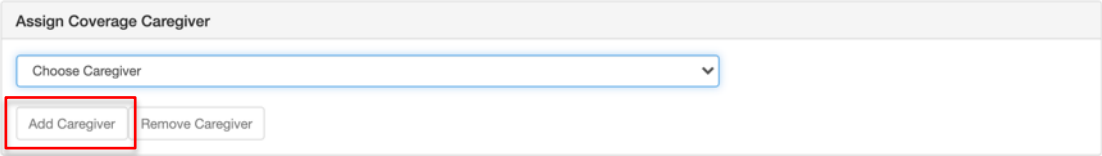
**Note:** To edit patient profiles, you must click on the **Profile** tab under the patient's page to view the patient profile.



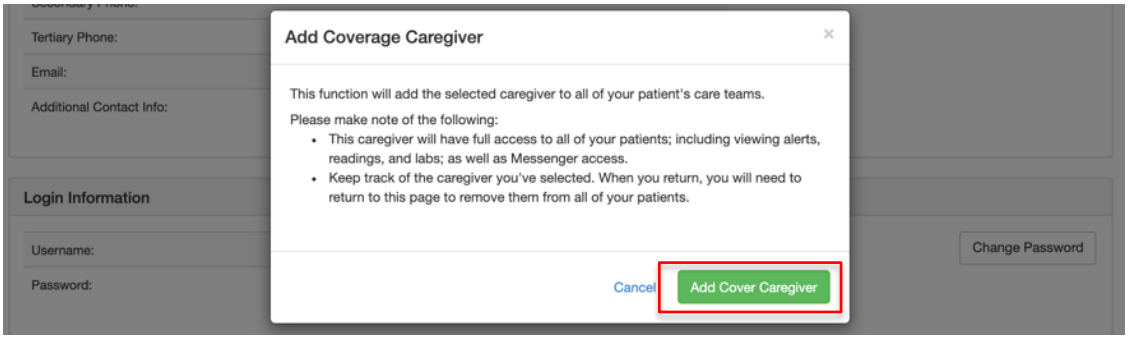

### 6.2.1 Assign Coverage Caregiver

Caregivers can temporarily assign other caregivers to cover for their patient roster.

1. Access account settings from your Caregiver Profile on the top-right corner of the dashboard.
2. Under **Assign Coverage Caregiver**, choose a caregiver from the drop-down menu. Click 'Add Caregiver.'

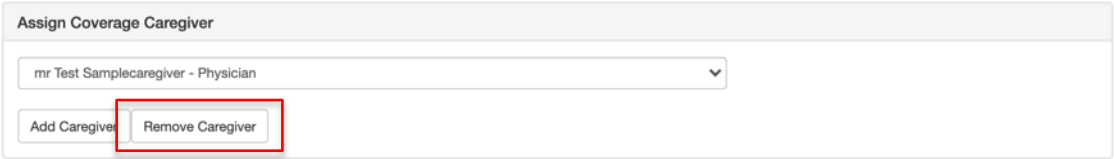



3. A window will pop-up to acknowledge the coverage caregiver's full access to your patients, including your patients' alerts, readings, and messages.
4. Click 'Add Cover Caregiver' to complete assigning a coverage caregiver.

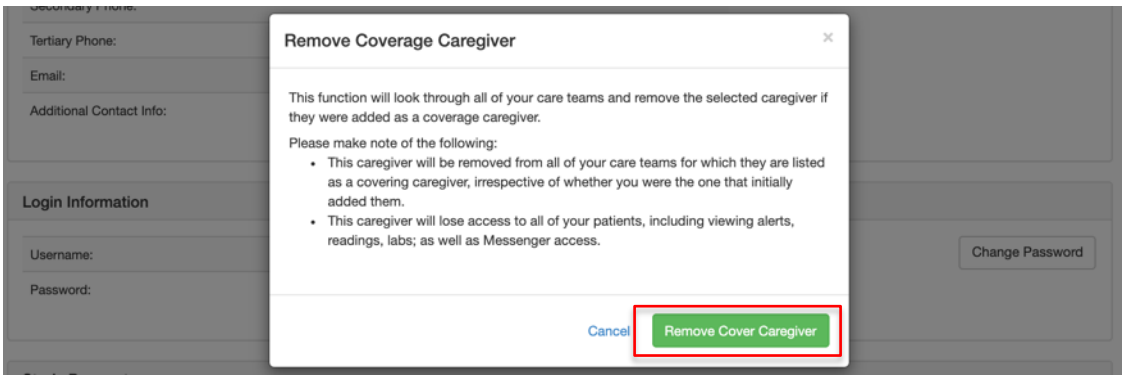



5. A new window will pop-up to confirm which patients have had their careteam modified to include the new coverage caregiver, as shown. Click 'Done' to exit this window.

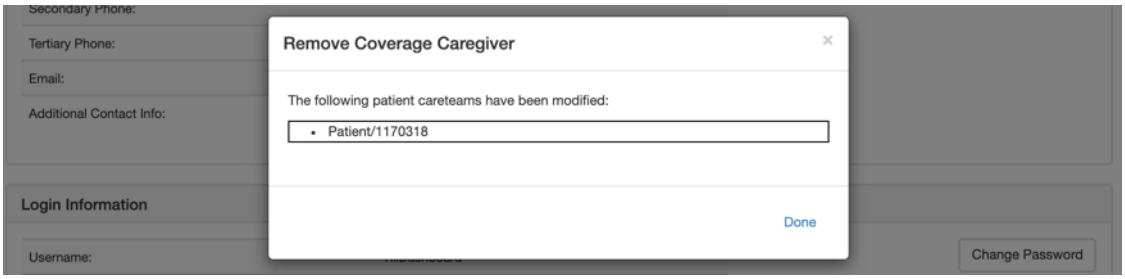
6. When you return, you will need to return to this page to remove the coverage caregiver from your patient roster. Select the caregiver you would like to remove and click 'Remove Caregiver'.




7. A window will pop-up to acknowledge removal of the selected caregiver from your patient roster, including access to your patients' alerts, readings, and messages.



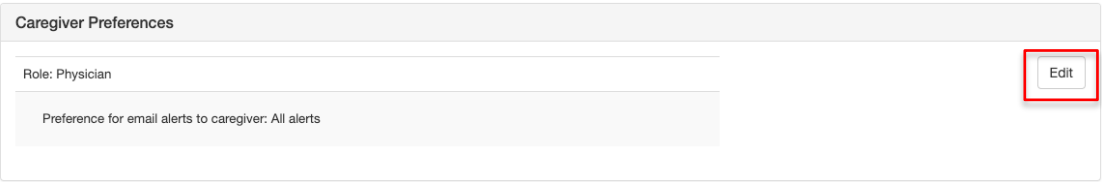

8. A new window will pop-up to confirm which patients have had their careteam modified to remove the chosen coverage caregiver, as shown. Click 'Done' to exit this window.



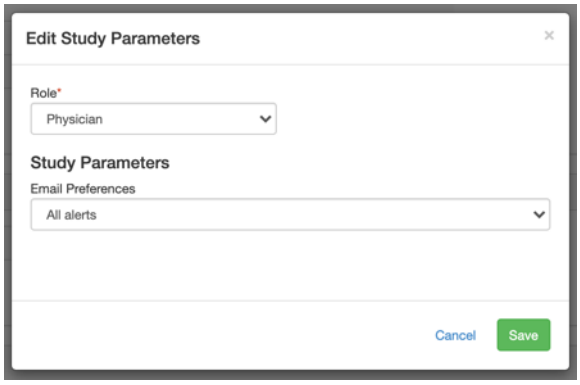

### 6.2.2 Change Email Alert Preferences

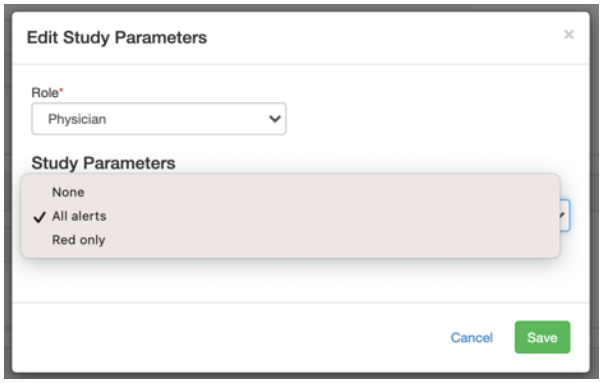
Email alert preferences can be changed in **Caregiver Preferences** from the Caregiver Profile.

1. In the **Caregiver Preferences** setting, click 'Edit' to change email alert preferences



2. From the pop-up window, choose a email preference from a drop menu. Click 'Save' to save changes.
    a. Selecting '**All alerts**' will allow all patient alerts sent to the caregiver's email.
    b. Selecting '**Red only**' will allow only urgent alerts sent to the caregiver's email.
    c. Selecting '**None**' will not allow any patient alerts sent to the caregiver's email.




# 7. Password Policy

Medly Dashboard employs the following password policy when setting a user's password:

- Minimum 8 characters
- Minimum 1 upper-case letter
- Minimum 1 lower-case letter
- Minimum 1 number
- Minimum 1 non-alphanumeric character (special character)
- When changing a password, must not match any of the previous eight (8) passwords.

**Note:** This password policy applies to both Medly Dashboard and Medly Messenger. Your login credentials are shared across both applications.

## 7.1 Patient Requirements

Patient passwords adhere to the above-noted password policy.

Patients do not currently have the ability to reset their password from the Medly mobile application. If a patient has forgotten their password, it must be reset by a member of their care team. Unlike clinician passwords, patient passwords never expire.

## 7.2 Clinician Requirements

Clinician passwords adhere to the above-noted password policy.

In addition, clinician passwords will expire after 120 days (approx. 4 months). Beginning on the 110th day, you will begin to receive one email every day at 2:30pm as a reminder that your password is set to expire, along with instructions to reset it. After the 120th day, your password will expire, and you will no longer be able to log in to Medly Dashboard. To reset your password at this stage, use the "Forgot password?" link on the login page.

### 7.2.1 Resetting your Password

You may reset your password from the Medly Dashboard login page

1. Click on "Forgot password?"
2. Enter your Medly username and select "Reset Password"
   - If your account does not have an associated email address, you will see an error message instructing you to please contact support@medly.ca to have an email address added.
   - If you enter an invalid username, you will see an error message instructing you to contact support@medly.ca to determine your username.
3. If successful, a password reset email (Subject: Medly Password Reset) will be sent to the email address associated with your Medly account. Locate this email in your inbox.
4. Select "Reset your password" in the password reset email. A new page will open in your web browser.
5. Follow the on-screen instructions and enter a new password. Enter your new password in both the "Type Password" and "Re-enter Password" fields.
6. Select "Submit". If the password you entered was valid, you will be taken to a confirmation page. You may now use your new password to log back into Medly Dashboard.

# 8. Privacy

Please refer to UHN's Privacy Policy and Procedure Manual or your organization's patient information policy to ensure you are taking necessary precautions when using Medly data to manage your patients.

# 9. Support

If you have any questions or comments, or you are having trouble with Medly Dashboard, please let us know!

**You can contact us at:** support@medly.ca or 437-248-3065