



# HOLON USER GUIDE

## App Onboarding

Version 2  
February 2024

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# Introduction

Thank you for choosing Holon! We are excited to welcome you to the Holon Community. We've put together the Insights User Guide to help you get started in the Holon app.

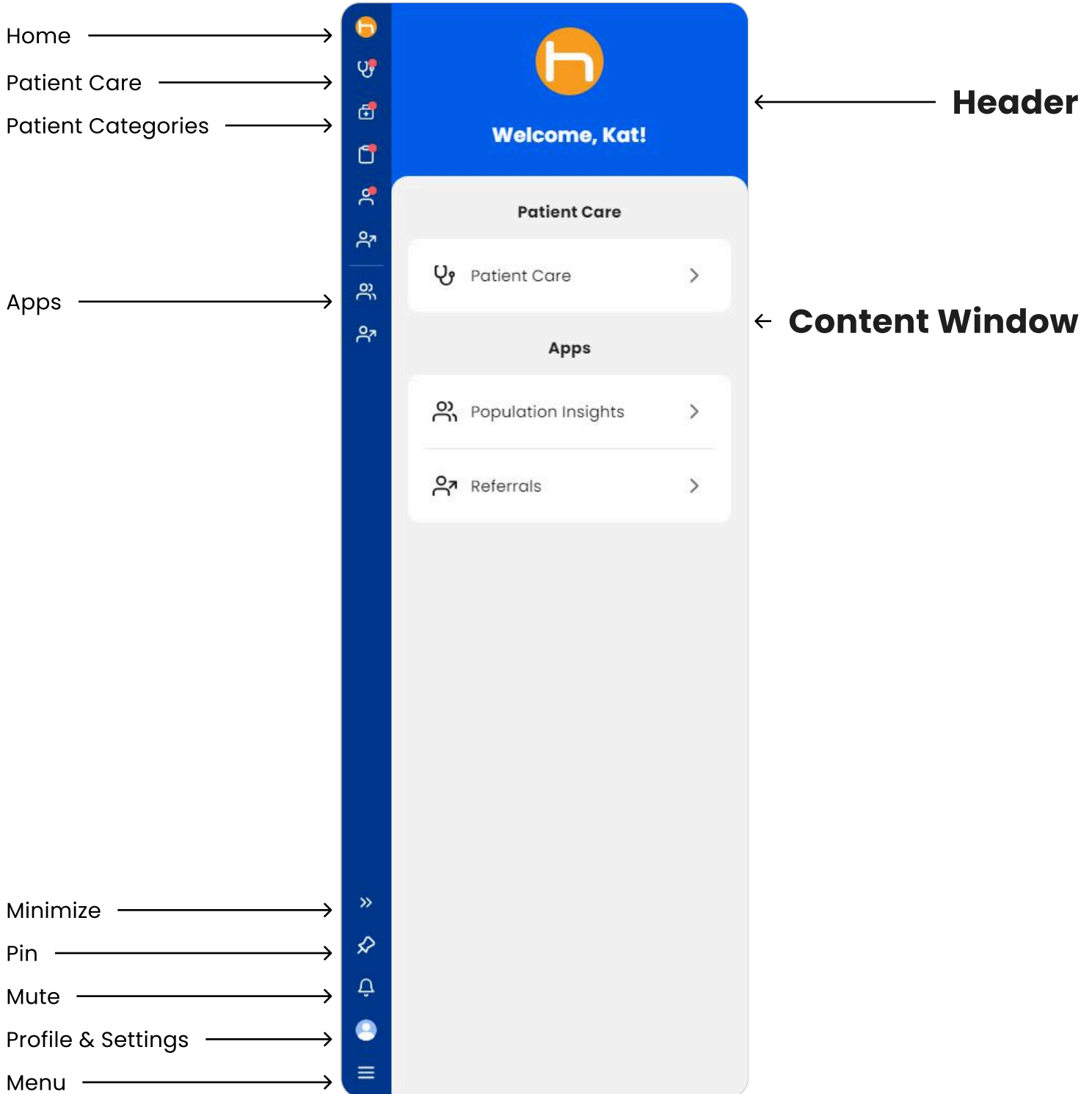
While this User Guide may be used as a general reference for features and functionalities available in the application, the Holon app is designed to offer admins and users a level of personalization. Admins may create custom workflows to meet the different needs of their organization and personalize them based on user roles and/or business rules. With that said, visuals and labels may differ, depending on which features are enabled and how configurations are set up for your organization.

If you see features in the User Guide that are not available in your app and would like to request them, please contact your administrator. For all other support (outages, feature issues, etc.), please contact Holon directly at [support@holonsolutions.com](mailto:support@holonsolutions.com).

# App Elements

The Holon app has 3 main elements:  
the **navigation bar**, the **content header**, and the **content window**.

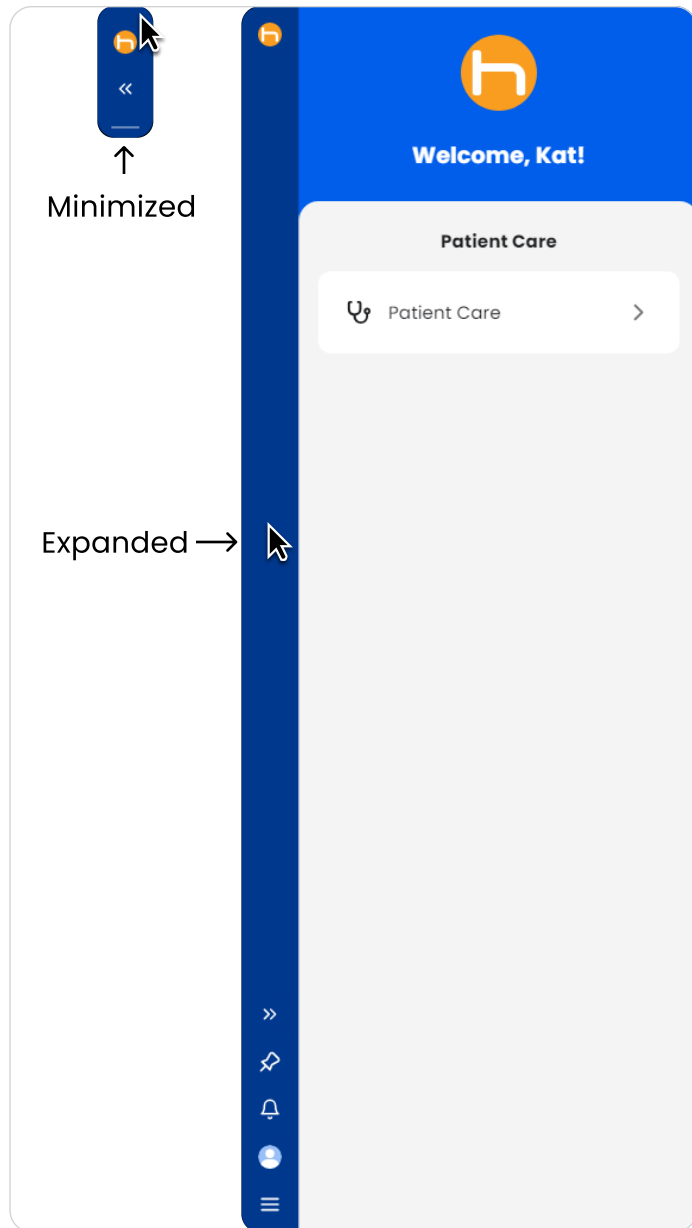
## Navigation Bar



# App Controls

## 01 Move App

**A** To move the app, click and hold anywhere on the empty space in the navigation bar. This can be done while the app is minimized or expanded.

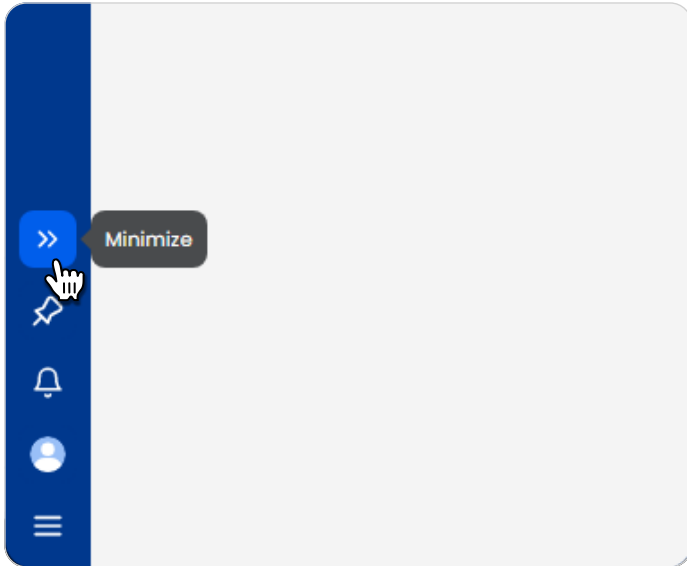


**B** While clicking and holding, you can move the app anywhere on your screen, or onto a secondary screen if you have a multi-screen setup.

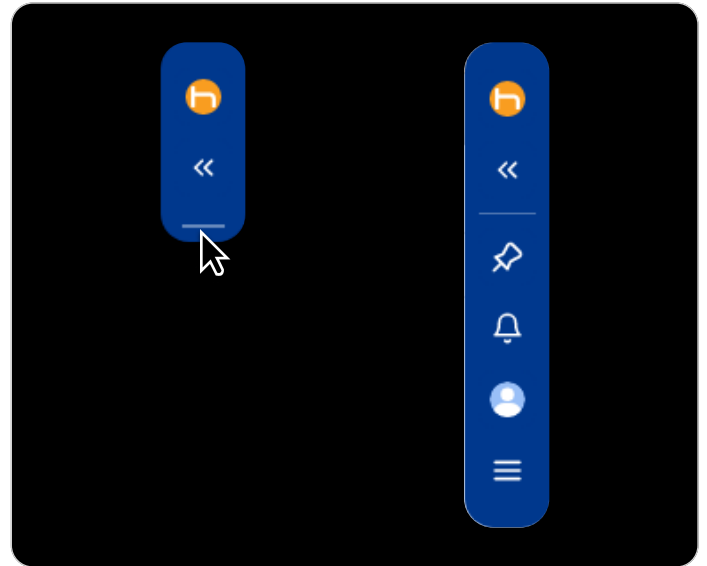
**Pro tip:** **CTRL+SHIFT+M** will reset the app window position if it gets dragged off screen, or with dual monitors

## 02 Minimize App

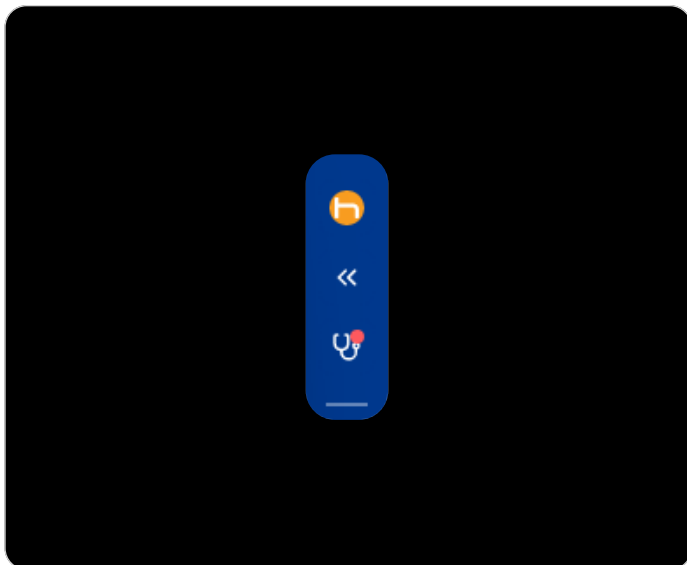
**A** To **minimize** the app, click the **double chevron** icon located near the bottom of the navigation bar. This will minimize the app into a small tab.



**B** When the app is minimized, you can access all of the icons by hovering over the navigation bar. Your patient data will still be sensed when the app is minimized.



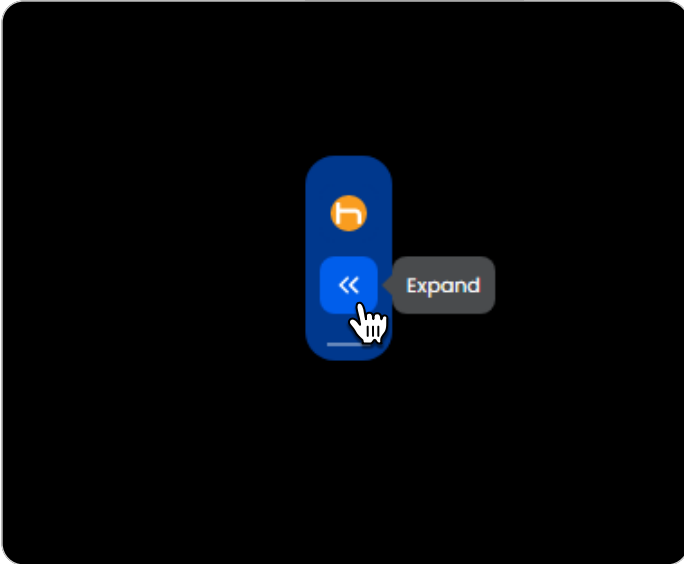
**C** When your EHR patient chart is opened and data is found, the **Patient Care** icon will appear with a red dot.



### 03 Expand App

**A** To **expand** the app, click on the **double chevron** icon. This will expand the app to the exact place it was minimized on your screen.

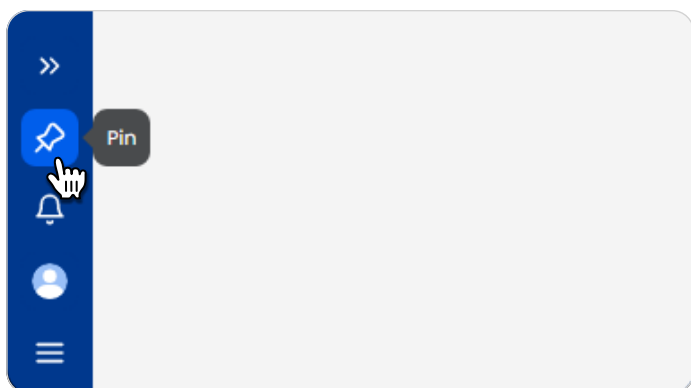
**B** The app can also be expanded by clicking any of the app icons on the navigation bar.



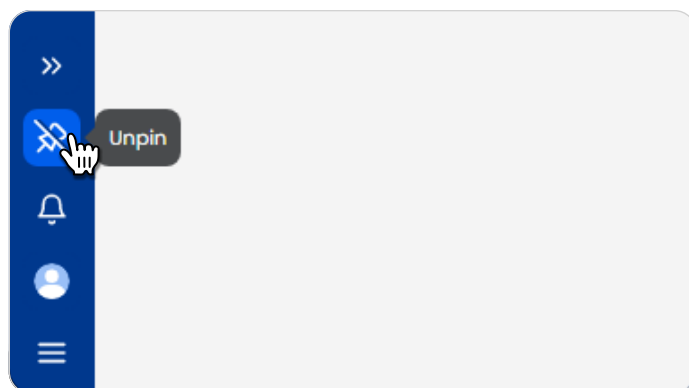
## 04 Pin

The Holon app window can be set to display on top of any other app window on your device, so that it remains in view at all times. By default, the app is set to display in the background, behind other active app windows.

**A Pin** the app to the front of your screen by clicking the **pin** icon on the navigation bar. This will apply a slash through the pin icon to visually show the app as pinned on top of your screen.



**B Unpin** the app from the front of your screen by clicking the **slashed pin** icon on the navigation bar. This will remove the slash from the pin icon to visually show the app as unpinned in the background.





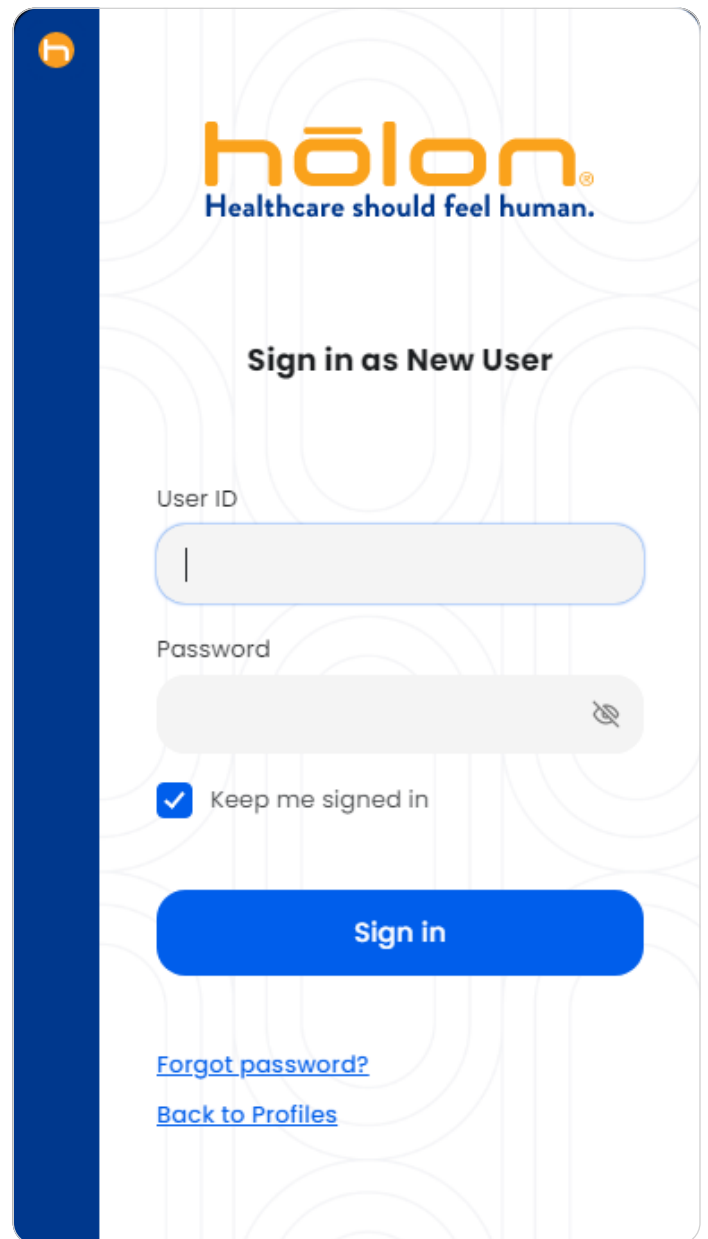
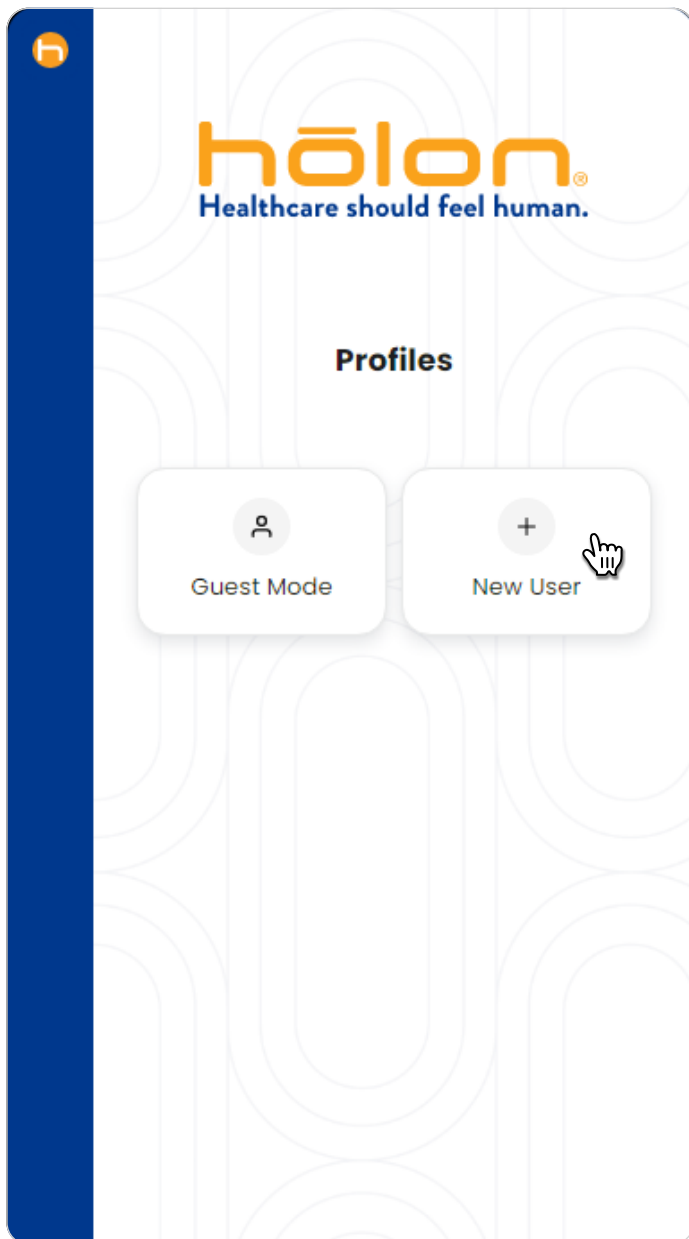
# Sign In

## 01 First Sign In

How to sign into the Holon app for the first time.

**A** Sign in by clicking **New User**.

**B** Enter your **User ID** (email address) and **temporary password** provided in your welcome email or given through your administrator.



## 01 First Sign In (continued)

**C** **Keep me signed in** is on by default. This automatically signs you into your profile if you quit and reopen the app. Click **Sign in**.

**hōlon**  
Healthcare should feel human.

### Sign in as New User

User ID

Password

Keep me signed in

**Sign in**

[Forgot password?](#)

[Back to Profiles](#)

**D** Enter your **new password**. Click **Update password**. You will automatically be signed in.

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Healthcare should feel human.

### Reset Your Password

**Password requirements:**

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- No parts of your username
- Your password cannot be any of your last 4 passwords

New password

Re-enter password

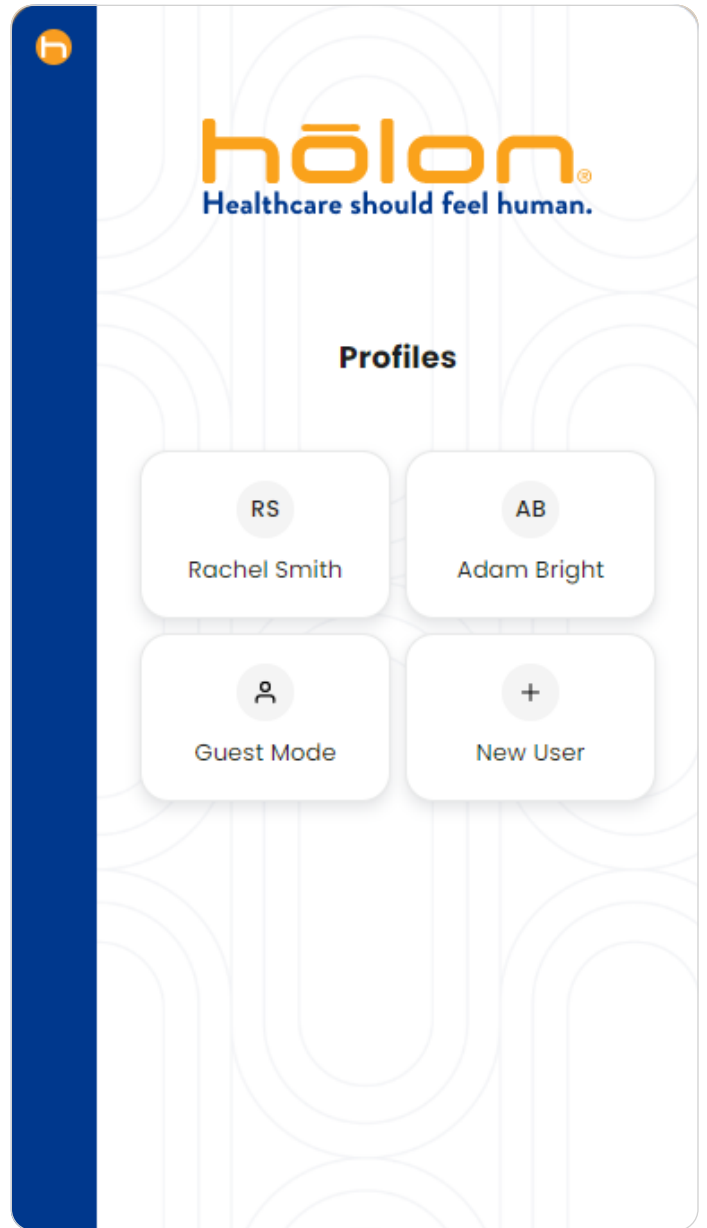
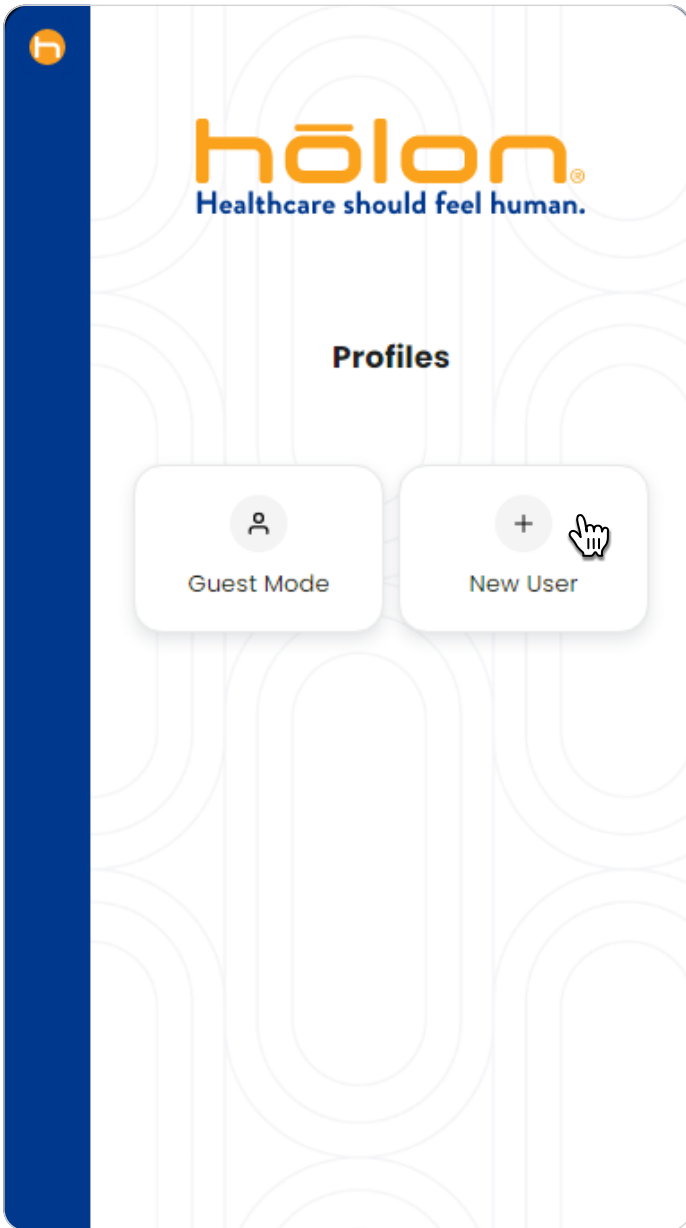
**Update password**

[Cancel](#)

## 02 Profiles

**Profiles** allow you to sign in more quickly by saving profiles for logged in users.

**A** If you sign in as **New User**, your profile will be saved. You can quickly sign in by clicking your profile, entering your password, and signing in.

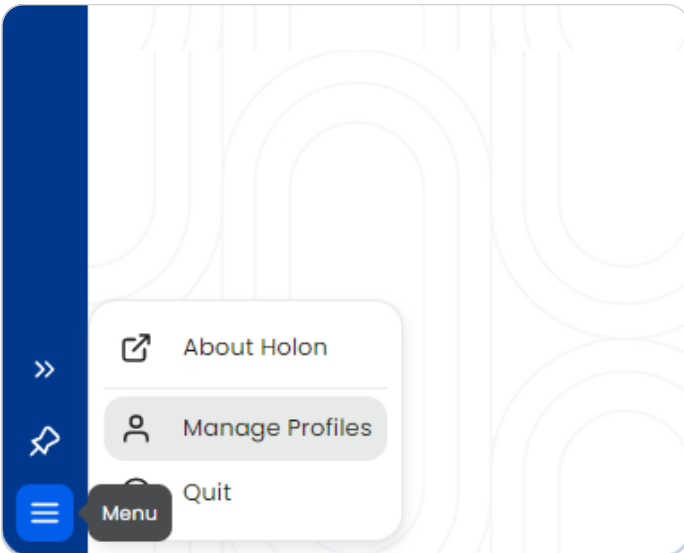


**B** If you sign in using **Guest Mode**, your profile will **not** be saved to the Profiles page. Use the same User ID and password to sign in with Guest Mode.

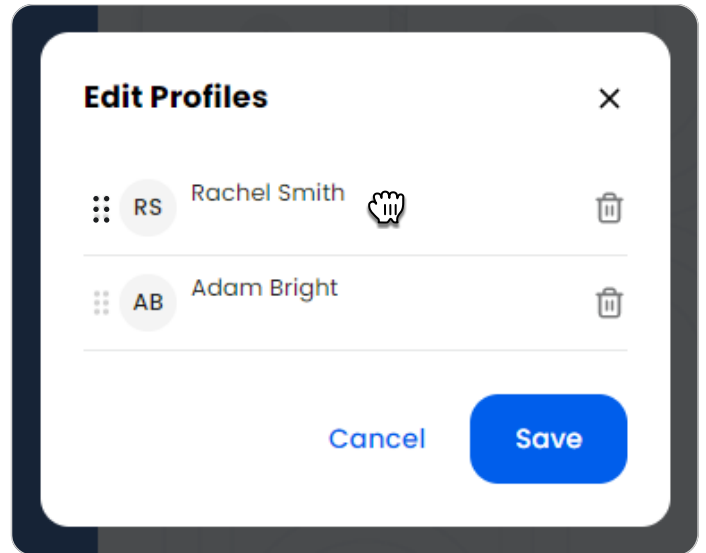
## 03 Profile Management

How to manage saved profiles.

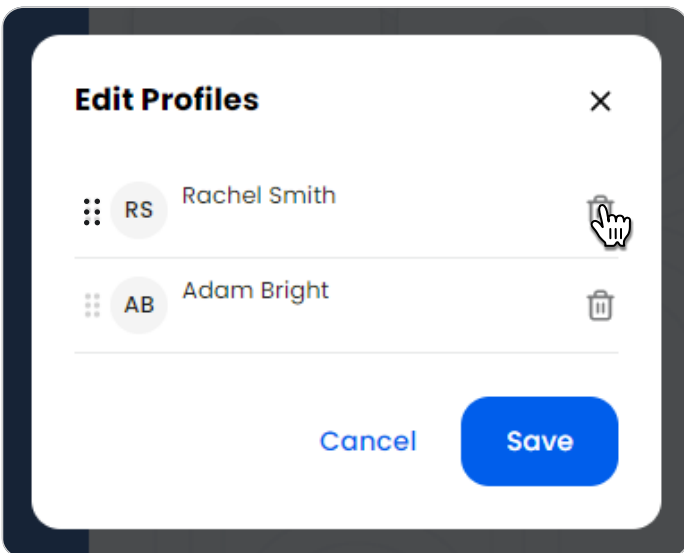
**A** To manage your profiles, click **Menu** and click **Manage Profiles**.



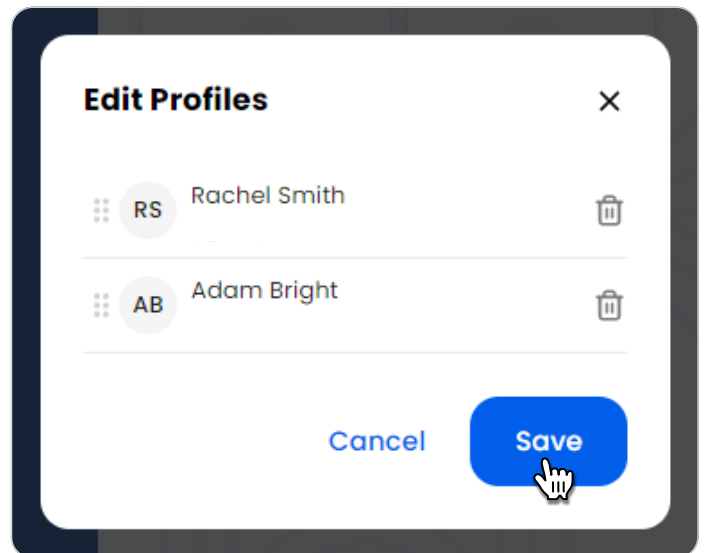
**B** Reorder the way your profiles are listed on the login screen by clicking, holding, and dragging a profile up or down on the profile list.



**C** Delete a saved profile by clicking the **Delete** icon.

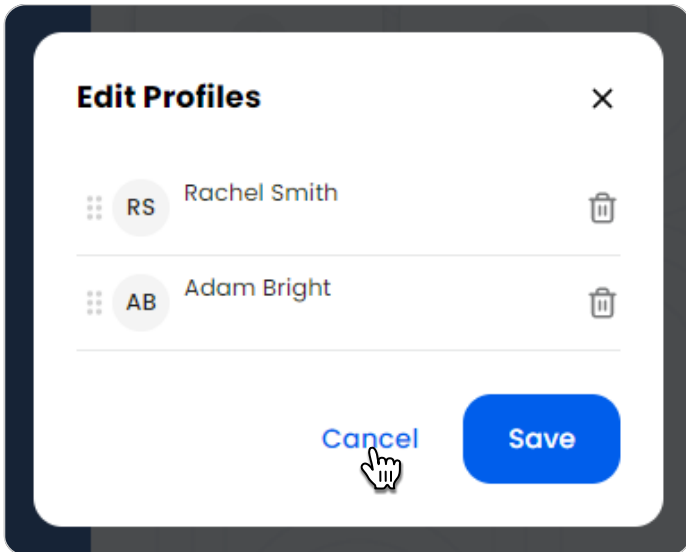


**D** To save your changes, click **Save**.



## 03 Profile Management (continued)

E To exit profile management without saving your changes, click **Cancel**.

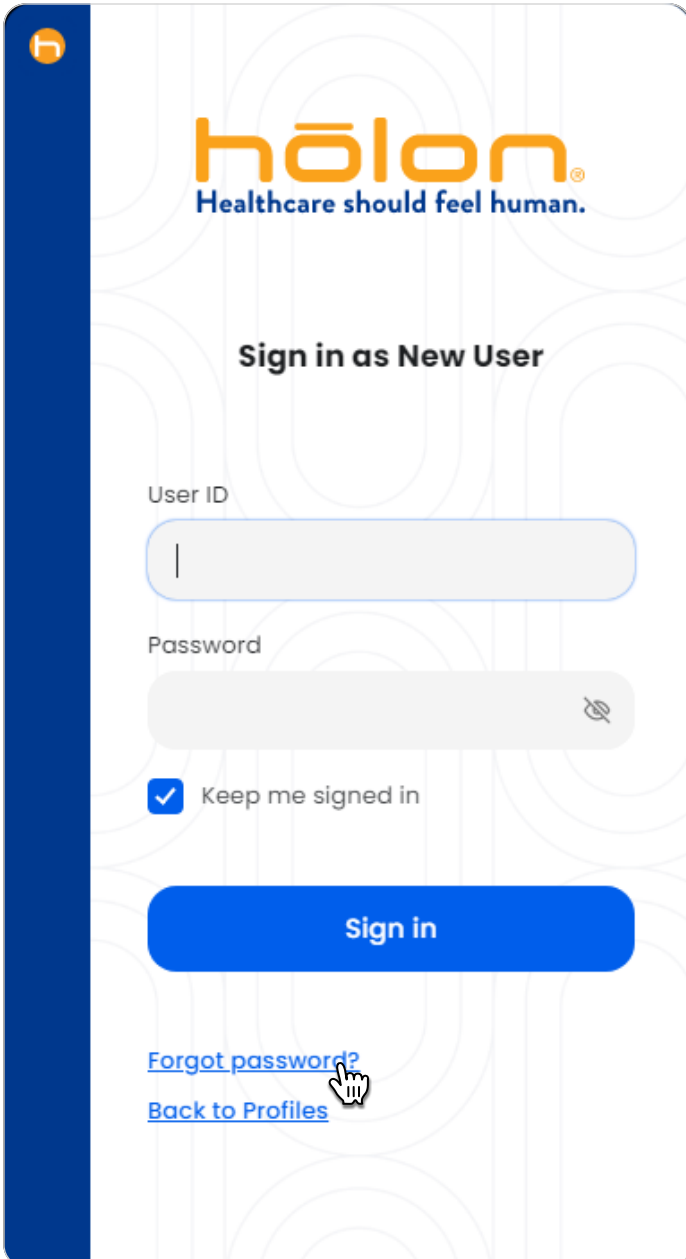


## 04 Forgot Password

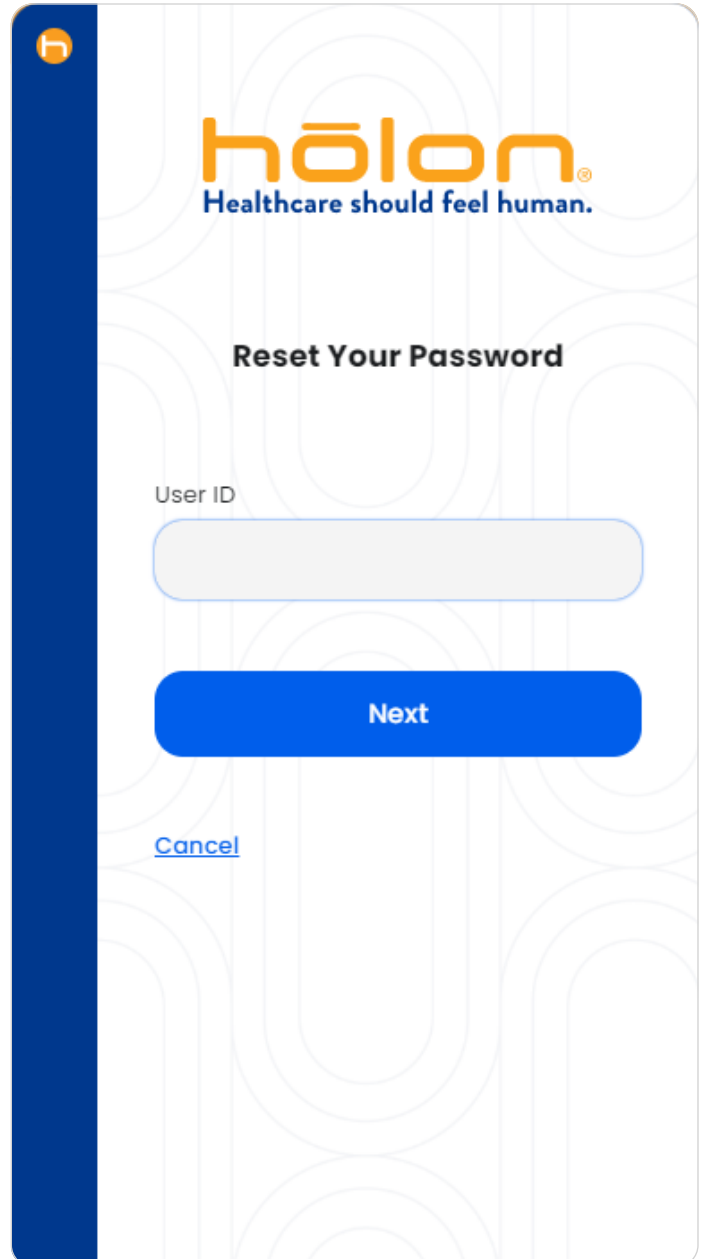
If you've forgotten your password or need to reset it, you can do so by clicking **Forgot Password?** on the Sign In page.

**A** Click the **Forgot Password?** link on the Sign In page.

**B** Enter your **User ID** and click **Next**.



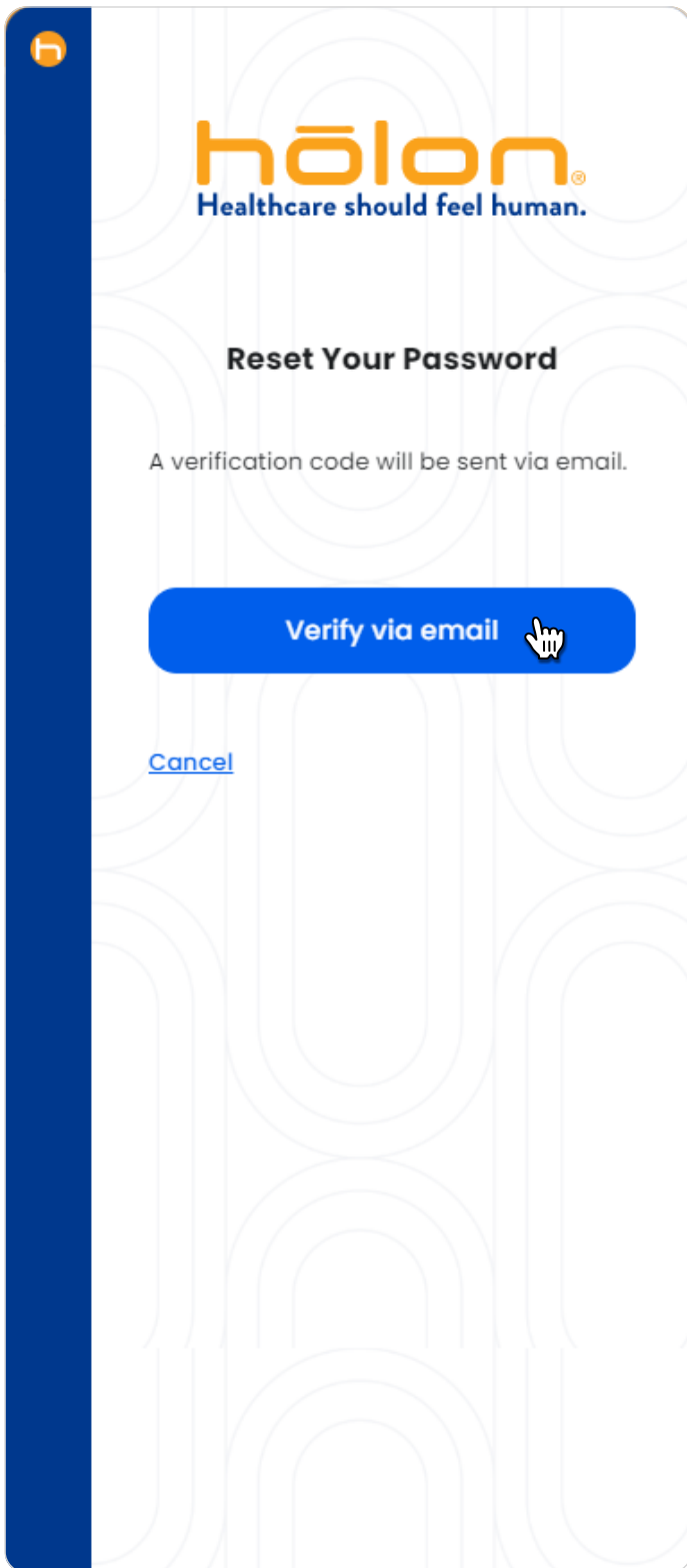
The screenshot shows the 'Sign in as New User' page. At the top is the hōlon logo with the tagline 'Healthcare should feel human.'. Below the logo is the heading 'Sign in as New User'. There are two input fields: 'User ID' and 'Password'. The 'Password' field has a toggle icon on the right. Below the fields is a checked checkbox labeled 'Keep me signed in'. A large blue 'Sign in' button is centered below the checkbox. At the bottom left, there are two links: 'Forgot password?' and 'Back to Profiles'. A mouse cursor is pointing at the 'Forgot password?' link.



The screenshot shows the 'Reset Your Password' page. At the top is the hōlon logo with the tagline 'Healthcare should feel human.'. Below the logo is the heading 'Reset Your Password'. There is a 'User ID' input field. Below the input field is a large blue 'Next' button. At the bottom left, there is a 'Cancel' link.

## 04 Forgot Password (continued)

**C** Click the **Verify Via Email** button.

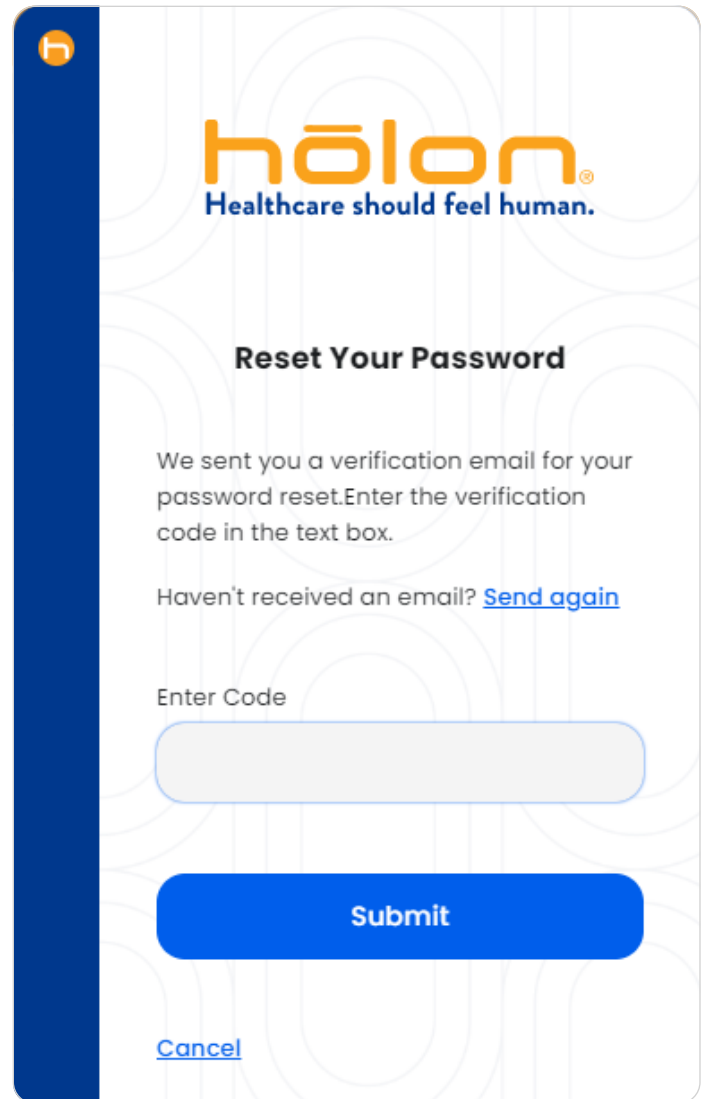


The screenshot shows the 'Reset Your Password' screen. At the top is the Holon logo with the tagline 'Healthcare should feel human.'. Below the logo is the heading 'Reset Your Password' and a sub-heading 'A verification code will be sent via email.'. A large blue button labeled 'Verify via email' is centered on the screen, with a mouse cursor hovering over it. A blue link labeled 'Cancel' is located at the bottom left of the screen.

**D** You will receive a verification code via your email (the same email used for your Holon User ID).

Enter your verification code into the **Enter code** field and click **Submit**.

- If you do not receive a verification code email, click the **Send Again** link.
- If you still do not receive a verification email, contact Holon Support at [holonsupport@holonsolutions.com](mailto:holonsupport@holonsolutions.com).



The screenshot shows the 'Reset Your Password' screen. At the top is the Holon logo with the tagline 'Healthcare should feel human.'. Below the logo is the heading 'Reset Your Password' and a sub-heading 'We sent you a verification email for your password reset. Enter the verification code in the text box.'. A blue link labeled 'Send again' is located below the sub-heading. Below that is a text input field labeled 'Enter Code'. A large blue button labeled 'Submit' is centered at the bottom of the screen. A blue link labeled 'Cancel' is located at the bottom left of the screen.

## 04 Forgot Password (continued)

**E** Enter & re-enter your new password. Click **Reset Password**. You'll now be signed in with your new password

**F** In a few cases, such as AD accounts, you will not be able to reset the password via the Forgot Password flow. If this applies to your ID, please contact your internal support for assistance.

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Healthcare should feel human.

### Reset Your Password

**i** Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- No parts of your username
- Your password cannot be any of your last 4 passwords

New password

Re-enter password

Sign me out of all other devices.

**Reset Password**

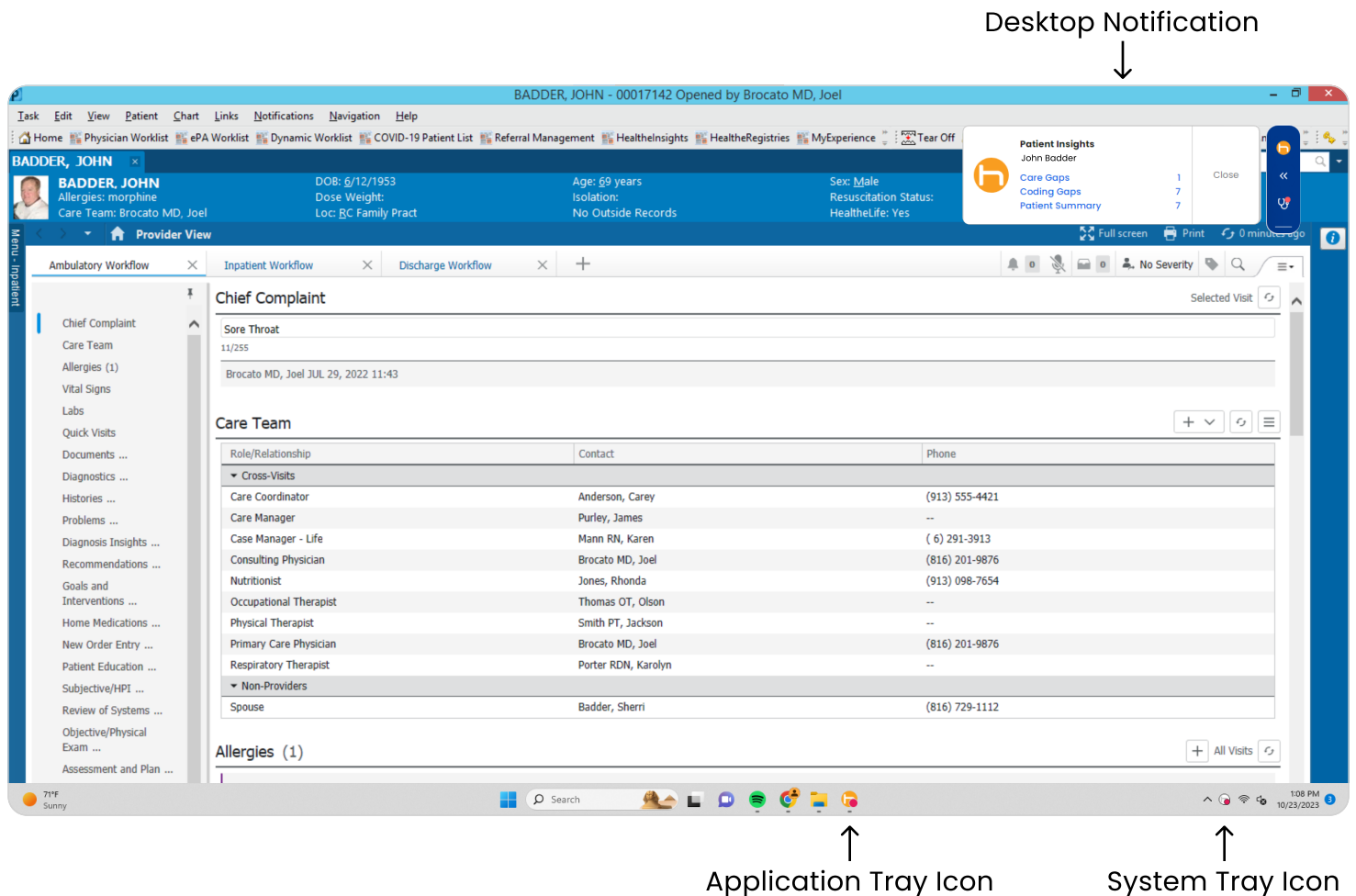
[Cancel](#)



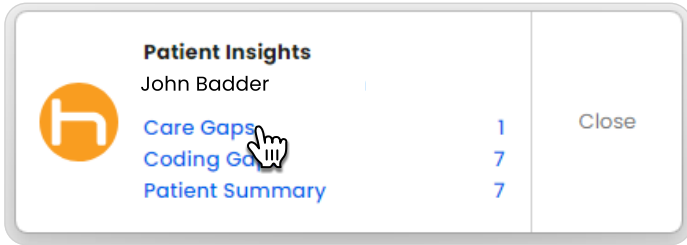
# Desktop Notifications

## 01 Notification Window Behavior

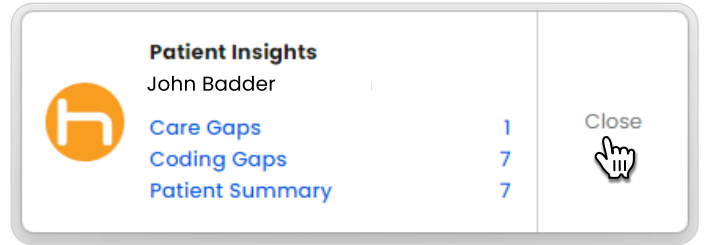
Whenever an EHR patient chart is opened and data is found, you will receive a notification popup detailing your patient's data. You will also see a small red dot over the Holon app icons in the navigation bar, application tray, and system tray.



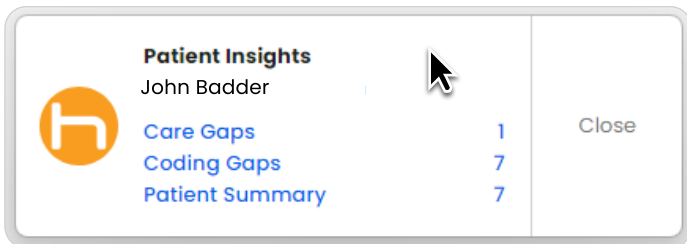
**A** You can jump straight into your patient's data by clicking the **blue links** on the notification popup.



**B** You can close the notification popup by clicking the **Close** button on the right side of the popup.



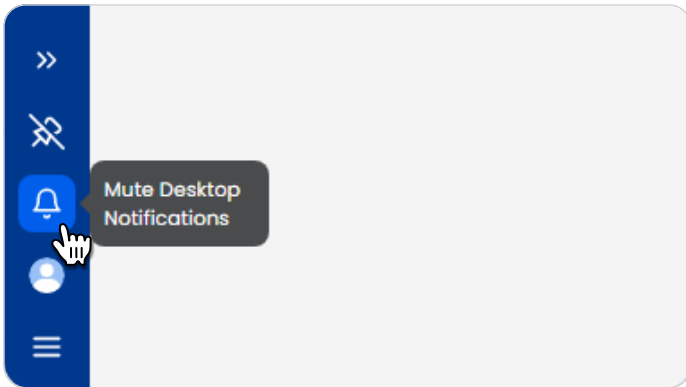
**C** To move the popup, click and hold anywhere on the popup's free space, then move it to the desired space on your screen. Any new notification popups will display in the same area.



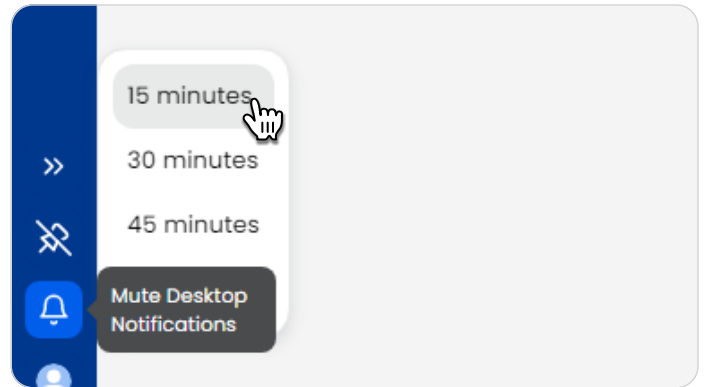
## 02 Mute Desktop Notifications

Desktop notifications can be muted for select time intervals. When notifications are muted, they will not pop up on your screen.

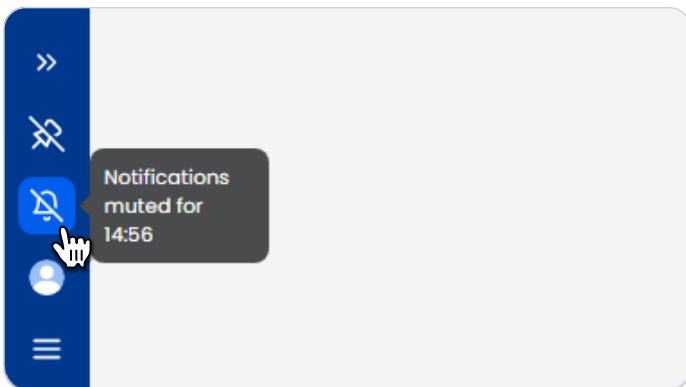
**A** To mute notifications, click the **bell** icon located on the navigation bar. A menu will display with a few timing options.



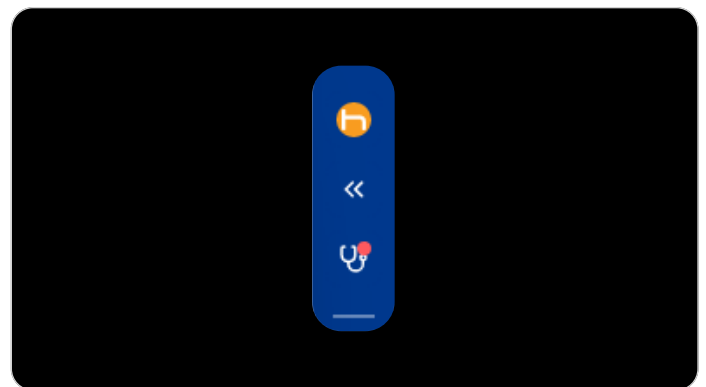
**B** Select the best timing option for you, and your notifications will remain muted for that duration of time. For example, if you select 15 minutes, your notification will remain muted for 15 minutes.



**C** When your notifications are muted, the **bell** icon will display with a slash through it, visually showing that your notifications are muted. Click the icon to **unmute** notifications.



**D** When your notifications are muted, you'll still receive patient data. You'll see a small red dot over the **Patient Care** icon on the navigation bar and on the Holon app icon in the application and system trays.

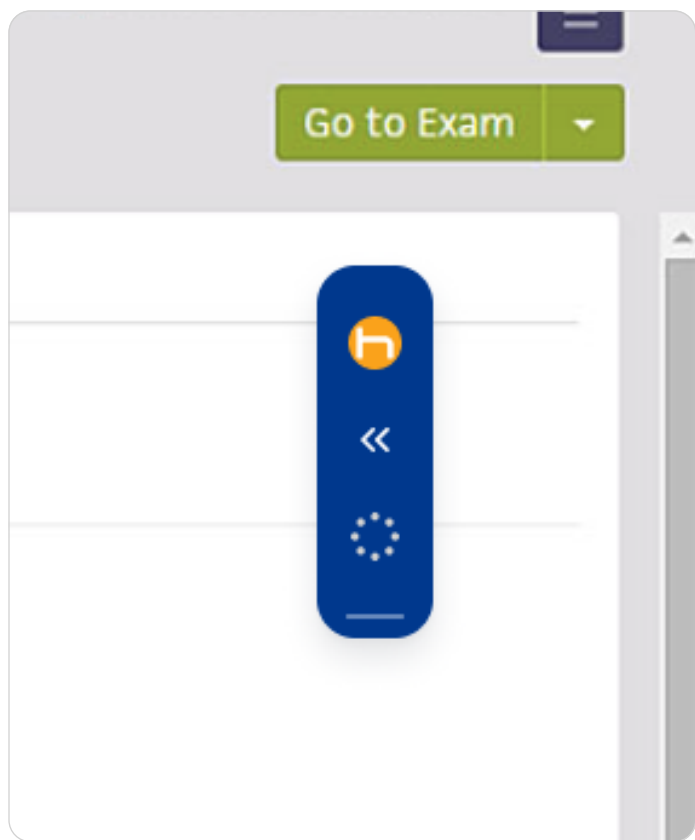


# Patient Care

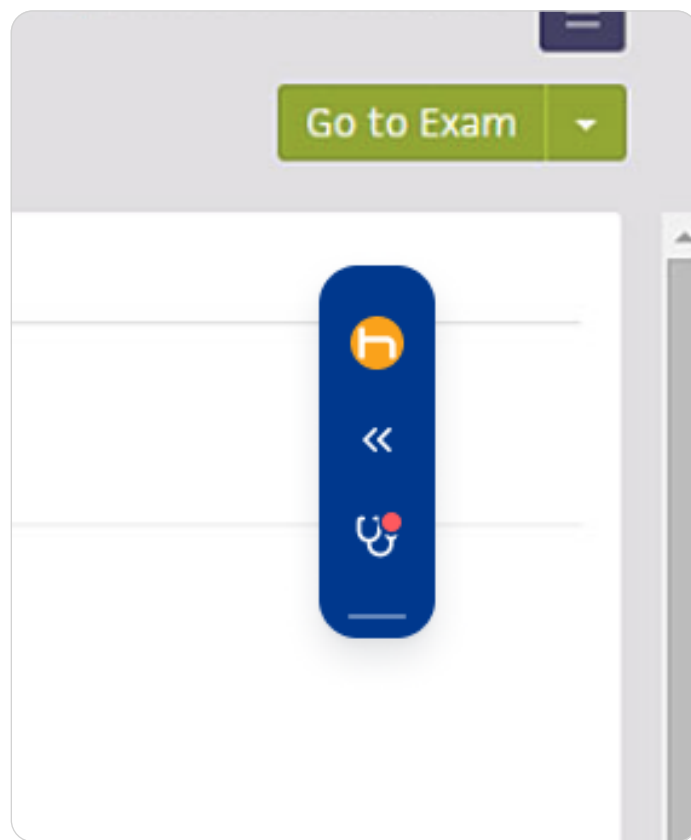
**Patient Care** contains categories like **Care & Coding Gaps**, **Risk Scores**, **Patient Summary**, etc. These categories provide detailed patient data that help you efficiently navigate care choices. Patient Care can be accessed via the navigation bar or the Home page once patient context has been sensed and data loaded into the app.

## 01 Patient Context Sensing

**A** When patient context is sensed, the app will show a spinner in the navigation bar.



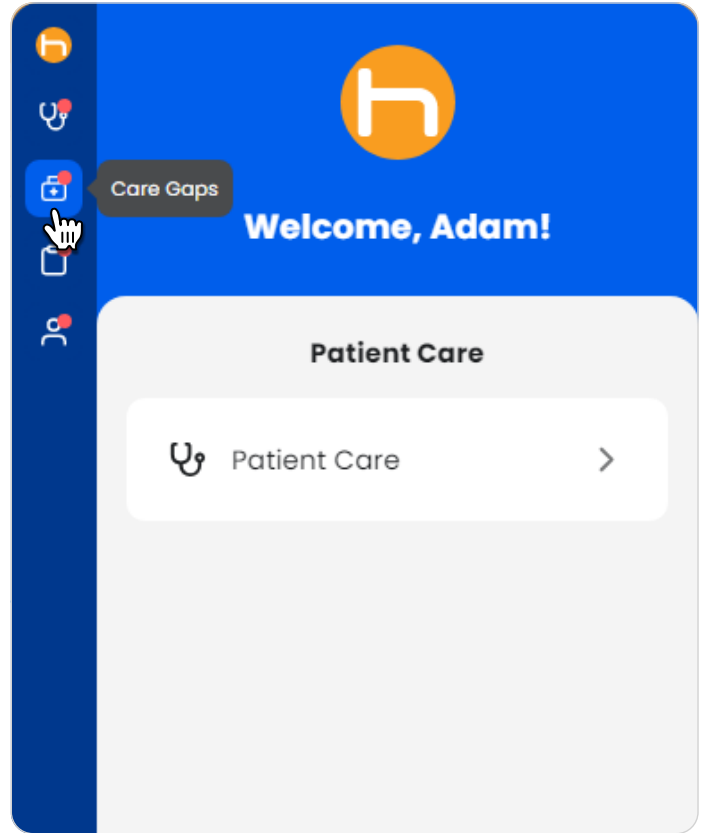
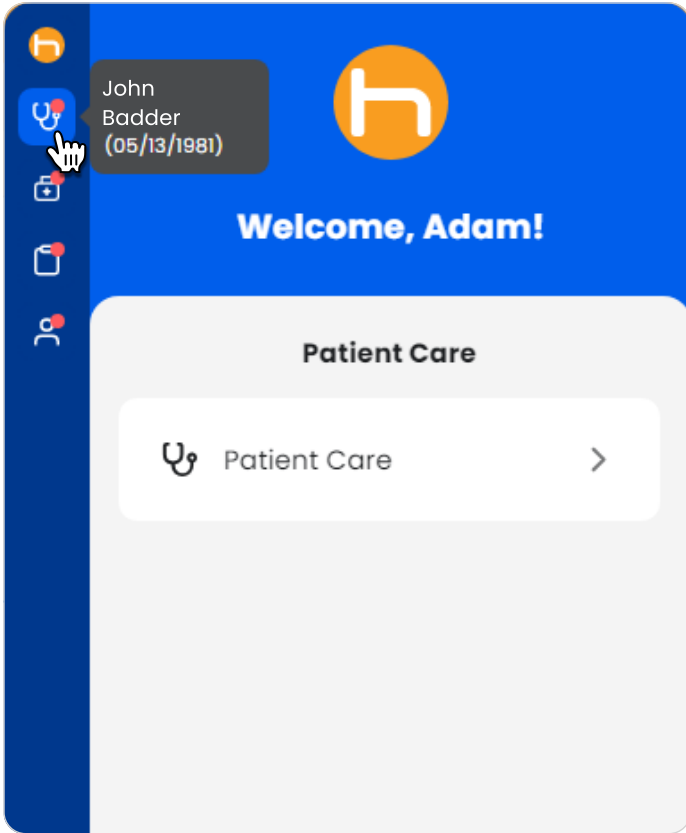
**B** If patient data is available, the Patient Care icon will show a red dot.



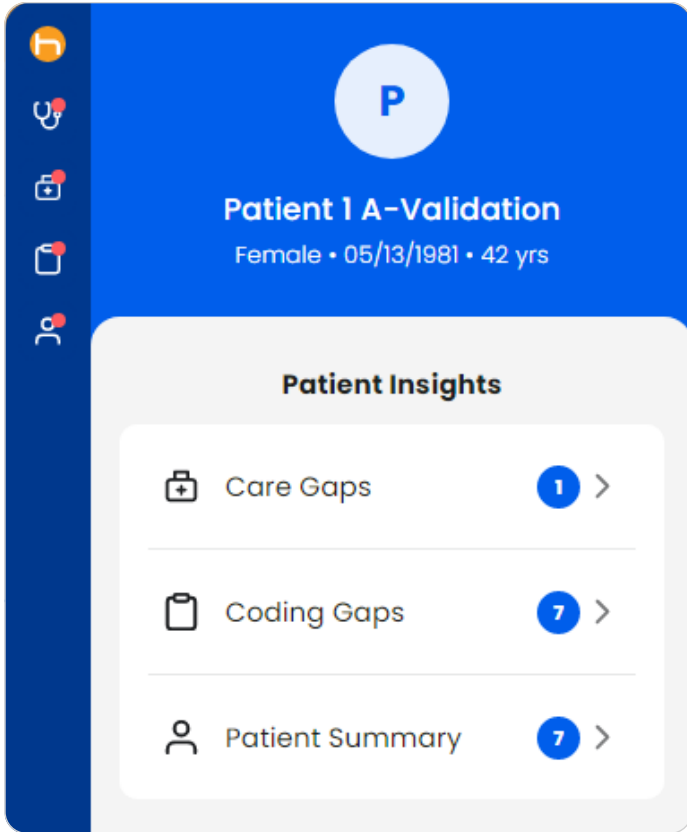
## 02 Navigate to Patient Care

**A** To access Patient Care, click on the **Patient Care** icon in the navigation bar or click the **Patient Care** section on the Home page.

**B** Navigate directly to each category via the category icons in the navigation bar.



**C** On the **Patient Care** page, all categories are listed as individual tabs.

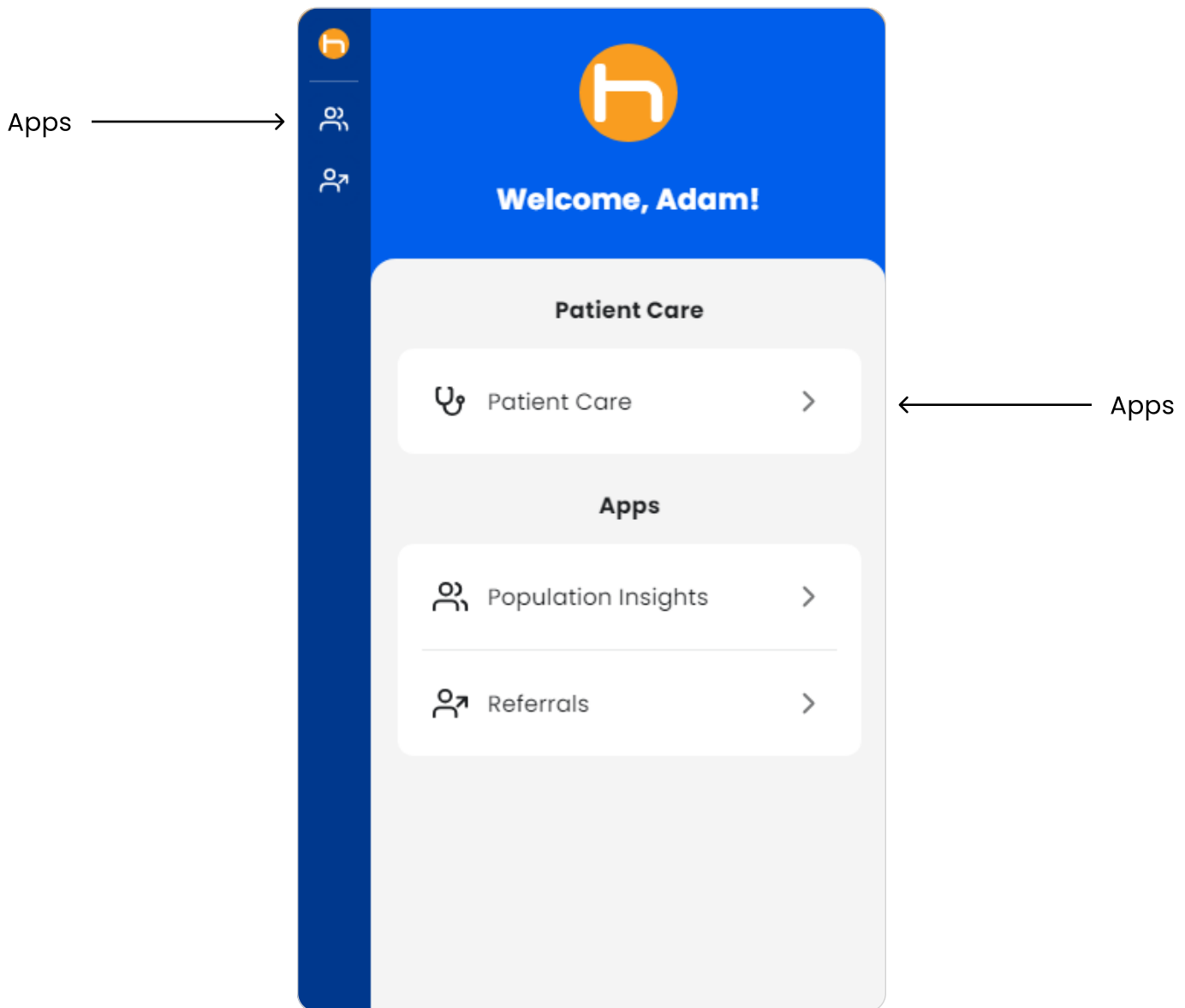


You can access detailed user guides for each Patient Care category on the [Holon Resources](#) page.

# Apps

You can access **apps** that assist with specific workflows like **Orders, Scheduling & Population Insights** via the navigation bar or the Home page.

- Each app will have an icon on the navigation bar. Click on the desired app icon to open that app's workflow.
- Each app will also have a tab on the Home page. Click on the desired app tab to open that app's workflow.



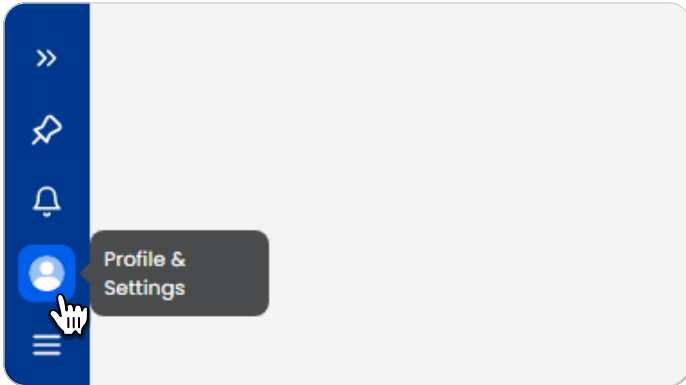
You can access detailed user guides for each app on the [Holon Resources](#) page.

# Profile & Settings

You can edit your profile and app settings by clicking the **Profile & Settings** icon.

## 01 Navigate to Profile & Settings

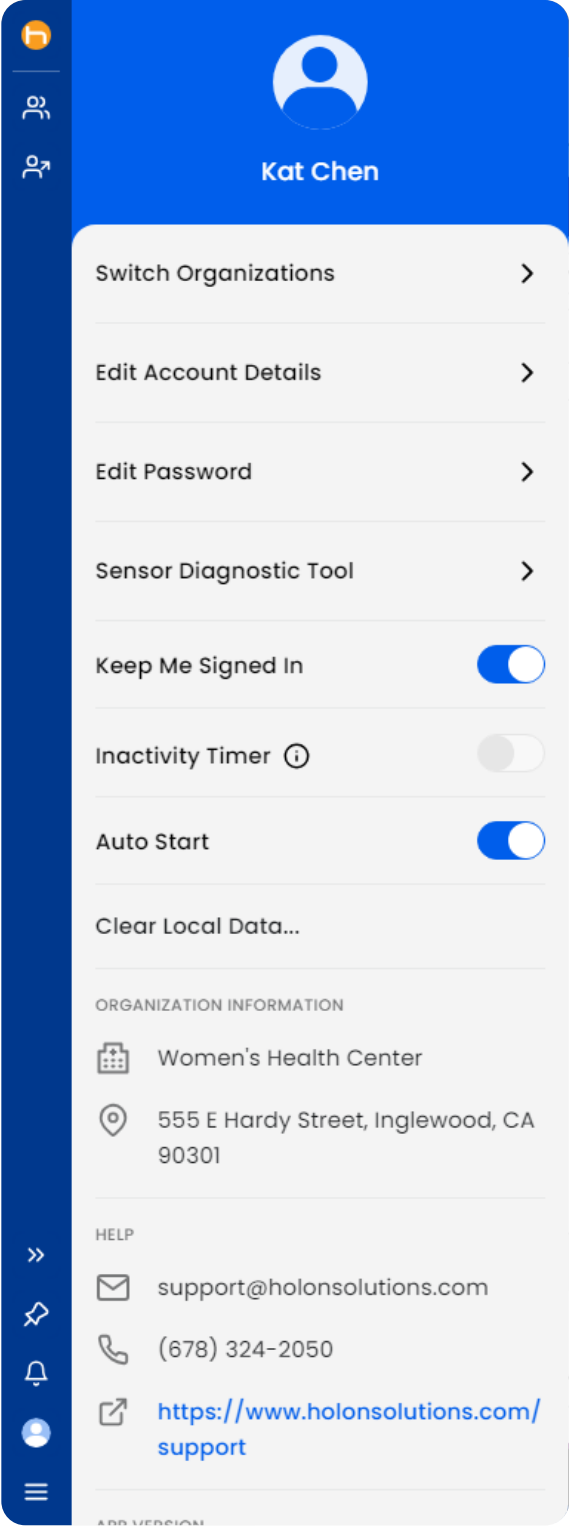
**A** Click the **Profile & Settings** icon on the navigation bar.





## 02 Profile & Settings Page

On the **Profile & Settings** page, you can:



The screenshot shows the Profile & Settings page for a user named Kat Chen. The page is divided into several sections:

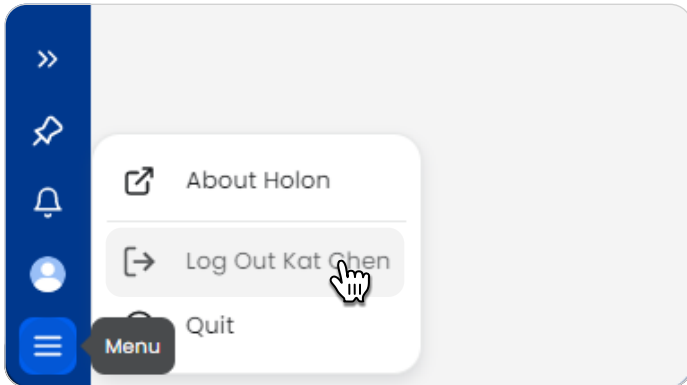
- Account Settings:** Includes options for Switch Organizations, Edit Account Details, Edit Password, and Sensor Diagnostic Tool.
- Authentication & Security:** Includes a toggle for Keep Me Signed In (turned on), an Inactivity Timer (turned off), and a toggle for Auto Start (turned on).
- Organization Information:** Displays contact information for Women's Health Center, including the address: 555 E Hardy Street, Inglewood, CA 90301.
- Help:** Provides support information, including the email address support@holonsolutions.com, the phone number (678) 324-2050, and the website URL https://www.holonsolutions.com/support.

Annotations with arrows point to specific features:

- Switch Organizations:** This applies only if your account belongs to more than 1 organization.
- Edit Account Details:** Edit your **Account Details**.
- Edit Password:** Reset your **Password**.
- Keep Me Signed In:** Turn **Keep Me Signed In** on or off. This keeps you signed into the app.
- Auto Start:** Turn **Auto Start** on or off. This automatically starts the Holon app when your device is turned on.
- Organization Information:** View your organization's contact information.
- Help:** View your organization's support information.

# Log Out & Quit App

**A** To sign out of the app, click the **Menu** icon and click **Log Out [Account Name]**. This will log you out of the active account and return you to Sign In.



**B** To quit the app, click the **Menu** icon and click **Quit**. This will close the Holon app. If **Keep Me Signed In** is enabled, you'll be automatically signed back in when you open the Holon app again.

