



# Product Usage Quick Guide

The screenshot displays the 'Patients' management page in the Creyos application. The interface includes a sidebar with navigation options: Patients, Reports, Protocols, Schedules, Help, and Settings. The main content area shows a list of patients with columns for Patient ID, Patient Status, and Session Status. A 'Start Protocol' button and a search bar are located at the top right. A 'Create Patient' button is visible on the right side of the patient list. A pagination control at the bottom indicates the current page is 1 of 5.

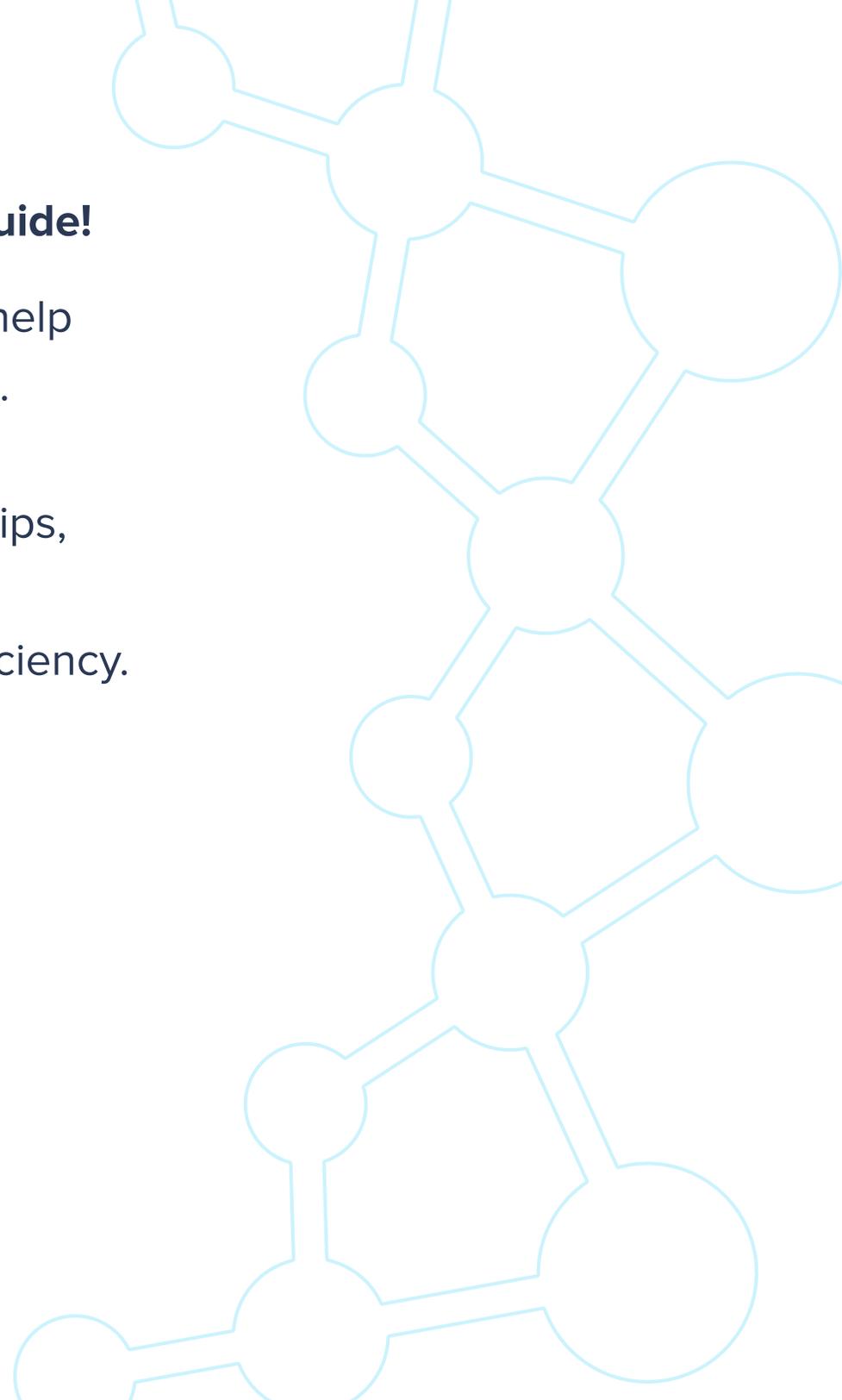
Patient	Patient Status	Session Status	Action
1205 testpatient@gmail.com	Active	Not Started March 10, 2025 @ 10:15 A.M.	View
3307 testpatient23@hotmail.com	Active	In Progress March 7, 2025 @ 2:14 P.M.	View
3381 testpatient9@gmail.com	Archived	Paused May 29, 2024 @ 10:12 A.M.	View
6018 testpatien31@gmail.com	Active	Closed January 17, 2025 @ 10:11 A.M.	View
2569 testpatient5@rogers.com	Active	Closed April 20, 2024 @ 10:11 A.M.	View

Navigation icons are overlaid on the screenshot: an envelope icon on the left, a clipboard with a plus sign at the bottom center, and a circular icon with an 'L' on the top right.

## **Welcome to the Creyos Platform Quick Guide!**

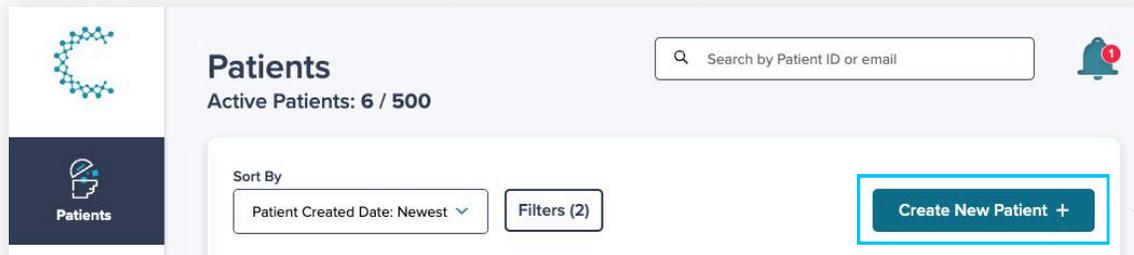
This quick reference guide is designed to help you get the most out of your use of Creyos.

Whether you're new to the solution or an experienced provider, you'll find essential tips, shortcuts, and step-by-step instructions to enhance your experience and improve efficiency.



# Creating a Patient

- 1 Upon login, navigate to the top right corner and click **“Create New Patient.”**



- 2 Fill in all necessary information. Email address only necessary for telehealth purposes.

The screenshot shows the 'Update Patient Profile' form. It has a back arrow on the left and a close 'X' on the right. The form contains the following fields:

- Patient ID:** Text input field containing '1256'.
- Gender:** Dropdown menu with 'Female' selected.
- Date of Birth:** Text input field containing '1992-01-02' with a calendar icon.
- Email Address (optional):** Text input field containing 'testpatient1@gmail.com'.
- Preferred Language:** Dropdown menu with 'English' selected.

At the bottom center is a blue button labeled 'Update >'.

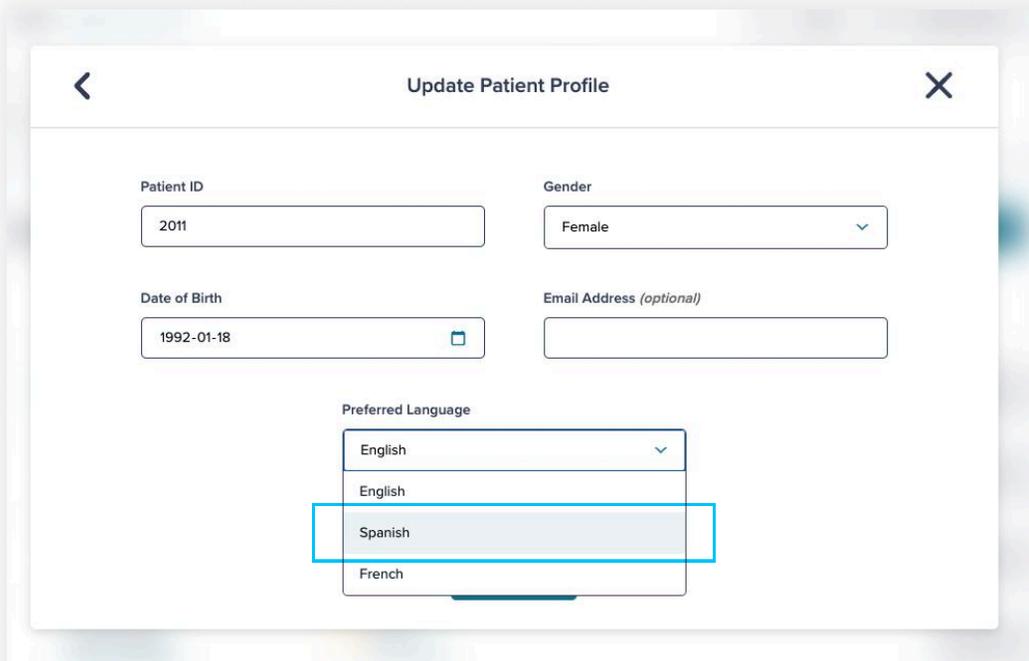
# Changing Language

- 1 Choose the patient you want to edit language for by clicking on the patient, then choose **“Edit”**, choose the appropriate language and then click **“Update.”**



The screenshot shows the 'Patient Details' page. At the top left is a back arrow and the title 'Patient Details'. To the right is a search bar with the placeholder text 'Search by Patient ID or email' and a notification bell icon with a red dot. Below this is a patient summary card for ID '2011' with the text 'Assign A Focus'. On the right side of this card are two buttons: 'Edit' (highlighted with a blue box) and 'Deactivate'. Below the summary card is a table with the following data:

ID	Email	Status	Gender	Date of Birth	Language
2011		Active	Female	1992-01-18	English



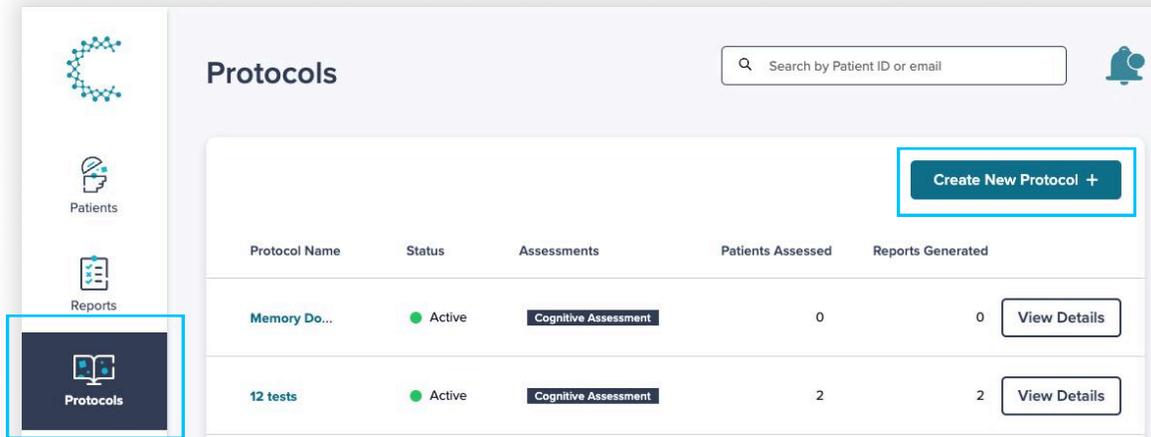
The screenshot shows the 'Update Patient Profile' dialog box. It has a back arrow on the top left and a close 'X' icon on the top right. The form contains the following fields:

- Patient ID: Text input with '2011' entered.
- Gender: Dropdown menu with 'Female' selected.
- Date of Birth: Date picker with '1992-01-18' selected.
- Email Address (optional): Empty text input.
- Preferred Language: Dropdown menu with 'English' selected. The dropdown is open, showing a list of options: 'English', 'Spanish' (highlighted with a blue box), and 'French'.

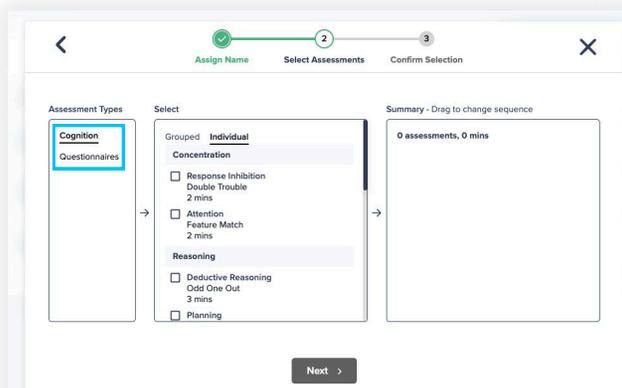
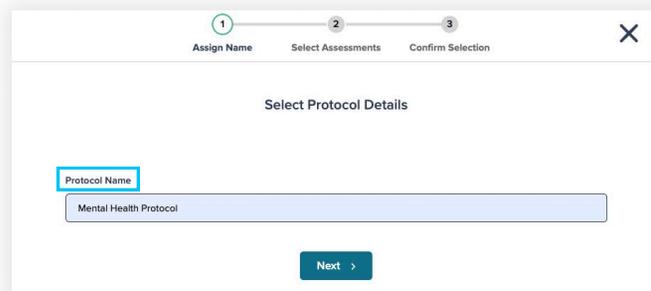
- 2 From here, all reports under that patient profile will load in the selected language. Assessments and questionnaires will also appear in that language.

# Creating Custom Protocols

- 1 Select the “**Protocols**” tab on the left side of the Creyos interface.
- 2 Click “**Create Protocol**” in the top right corner.

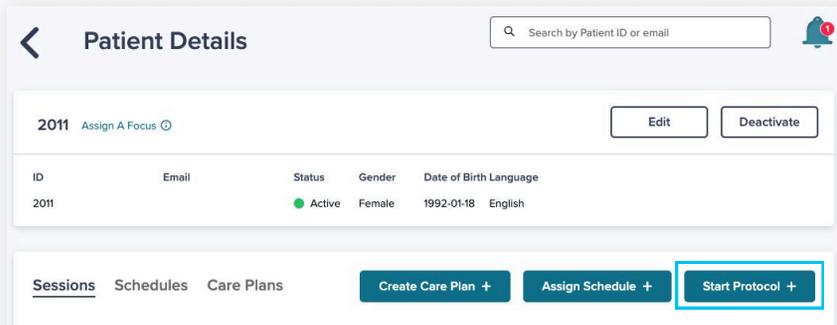


- 3 Name the protocol accordingly and choose relevant tasks/questionnaires. Make sure you go to “**Individual**” when selecting tasks and use the [Condition Based Research Guide](#) to determine which cognitive tasks to include in protocol.

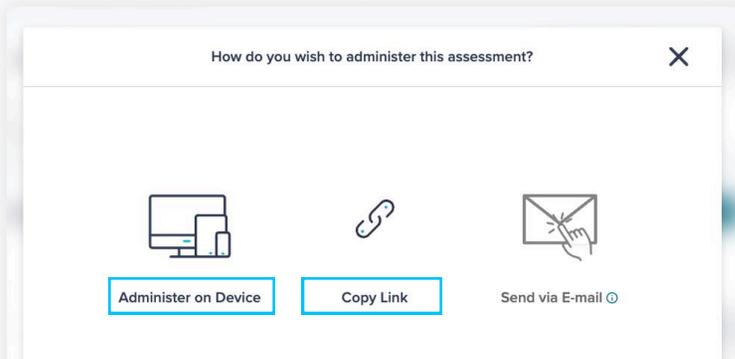


# Administering a Protocol

1 Click into patient profile then click **“Start Protocol.”**

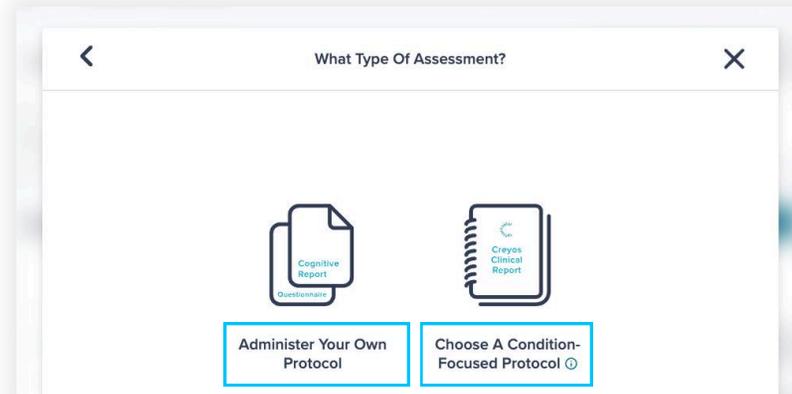


2 Select administration method → on device (in person), copy link, or send via email.



- a. Copy link: generates a link for you to send via email
- b. Send via email: prompts you to send the email through Creyos platform

3 Choose either **“Administer Your Own Protocol”** or **“Condition Focused Protocol.”**



This will depend on what you are assessing.

- a. For ADHD or MCI, select condition-focused protocol
- b. For everything else, administer your own protocol

# Accessing Reports & Notes

There are two ways to access reports and notes:

- 1 “Reports” tab (all patient reports can be found here).

The screenshot shows the 'Reports' tab interface. The left sidebar has a 'Reports' menu item highlighted. The main content area has a search bar for 'Lastest Activity...' and a 'LATEST' filter. Below is a table of reports:

Report	Assessment	Completion Date	
1221 amyowen16@gmail.com	Cognitive Assessment	2025-01-31	View Report
1221 amyowen16@gmail.com	Summary	2025-01-31	View Report
2011	ASRS	2025-01-24	View Report

- 2 “Patient” tab (click into patient profile to view their specific report and associated notes).

The screenshot shows the 'Patient' profile interface for patient ID 1221. The left sidebar has a 'Patients' menu item highlighted. The main content area shows patient details and a table of sessions:

1221 Assign A Focus Edit Deactivate

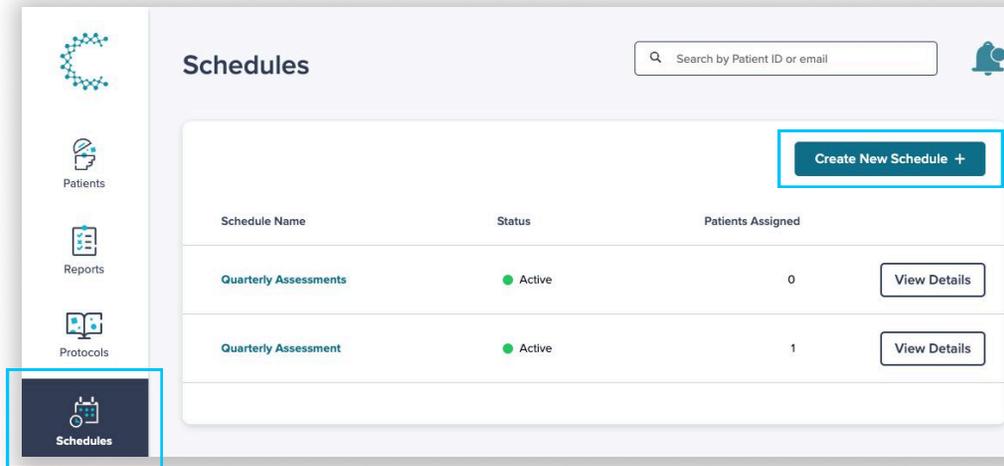
ID	Email	Status	Gender	Date of Birth	Language
1221	amyowen16@gmail.com	Active	Female	1992-01-18	English

**Sessions** Schedules Care Plans Create Care Plan + Assign Schedule + Start Protocol +

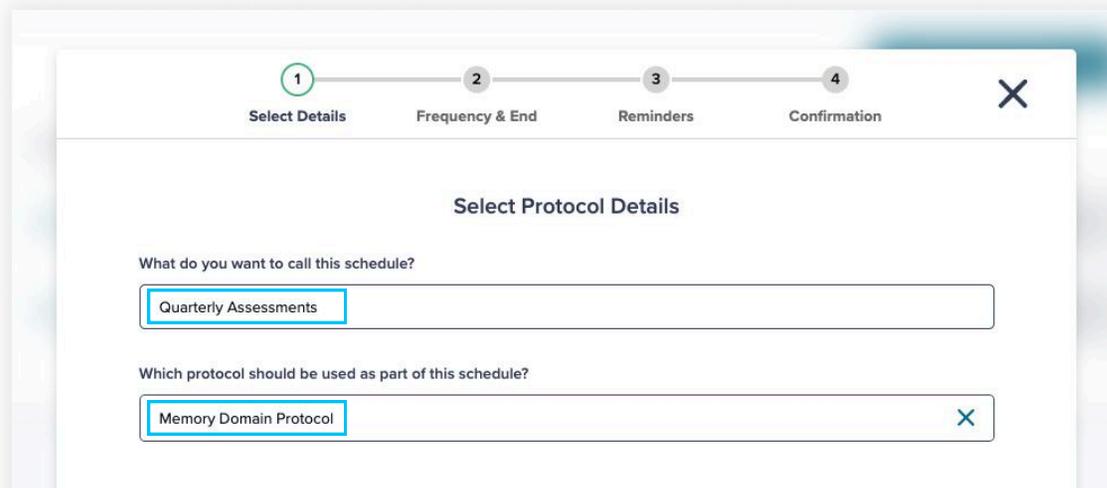
Administration Date	Session Status	Completion Date	
2025-01-31 ADHD focused protocol (18+ years)	Paused View Details		Note
2025-01-31 ADHD focused protocol (18+ years)	Closed View Details	2025-01-31 9:04AM	Report Note

# Creating Schedules

- 1 Select the **“Schedules”** tab on the left side of the Creyos interface.
- 2 Click **“Create New Schedule”** in the top right corner.



- 3 Name the schedule and select which protocol you want to use.



# Creating Schedules (continued)

4 Determine frequency and when it will end.

The screenshot shows a mobile application interface for creating a schedule. At the top, a progress bar indicates four steps: 'Select Details' (completed), 'Frequency & End' (current step), 'Reminders', and 'Confirmation'. The main content area is titled 'Frequency & End'. It contains two sections: 'How often should assessments be sent?' with a text input '3' and a dropdown menu set to 'Months'; and 'When should the schedule end?' with three radio button options: 'After 1 Years' (selected), 'After Number assessments', and 'Never'.

5 Select if a reminder should be sent.

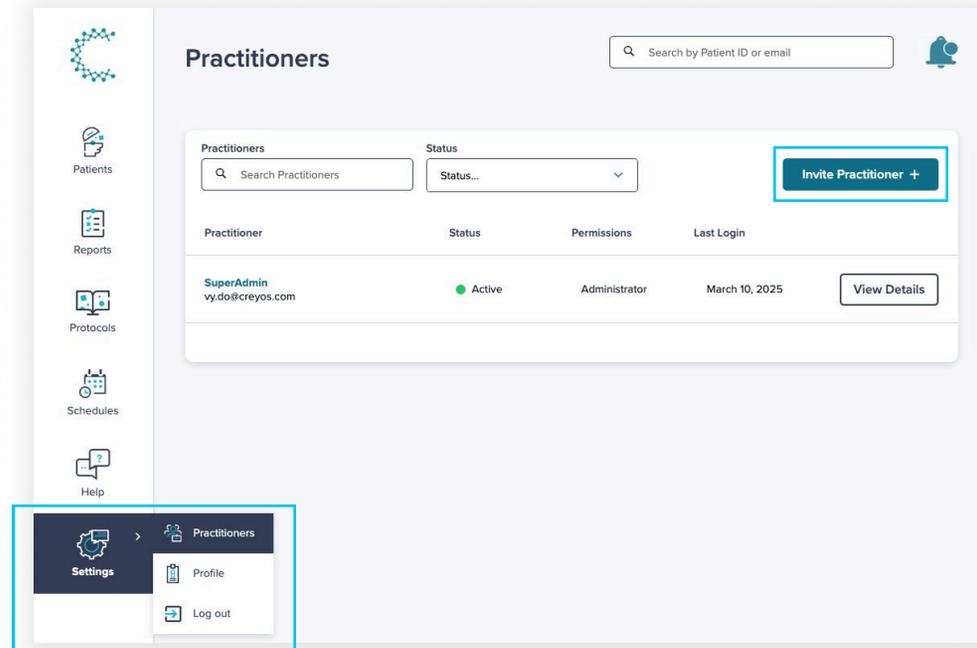
The screenshot shows the 'Set Reminder Schedule' step. The progress bar at the top shows 'Select Details' and 'Frequency & End' as completed steps, with 'Reminders' as the current step. The main content area is titled 'Set Reminder Schedule' and includes the instruction 'When should reminders be sent? Select all that apply:'. Below this, there is a single checkbox option labeled '48 hours from now' which is checked.

6 Click "Save."

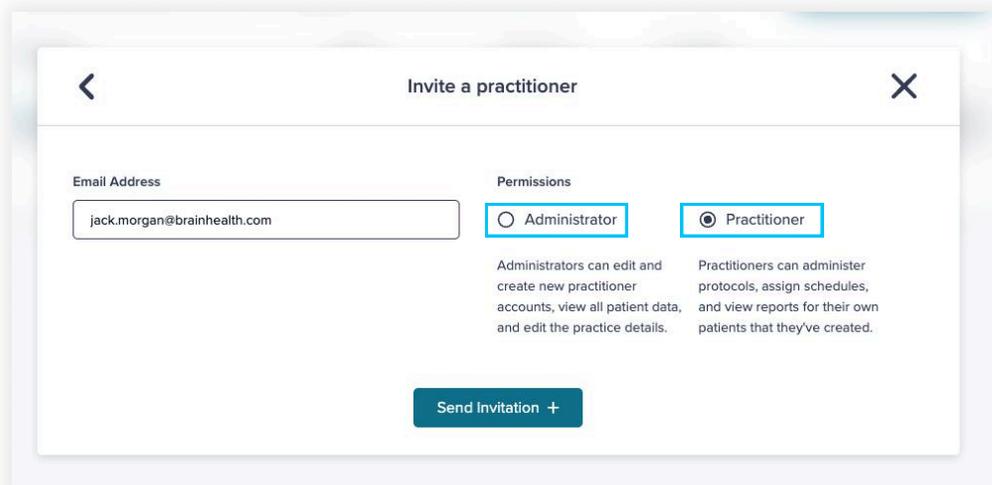
The screenshot shows the 'Confirm Schedule Details' step. The progress bar at the top shows 'Select Details', 'Frequency & End', and 'Reminders' as completed steps, with 'Confirmation' as the current step. The main content area displays a summary of the schedule: 'Schedule Name: Quarterly assessments', 'Protocol: Memory Domain Protocol', 'Frequency: Every 3 months', 'Ends: After 1 years', and 'Reminder(s): 48 hours from now'. At the bottom, there is a 'Save >' button.

# Using Settings

- 1 Select the **“Settings”** tab on the left side of the Creyos interface.
- 2 View your personal Creyos profile or to invite other administrators/practitioners from your organization so that they can create their own login.



- 3 When inviting new members to create their login, you can make them either an **“Administrator”** or **“Practitioner.”**



## Need Further Support?

Feel free to reach out to [help@creyos.com](mailto:help@creyos.com) for assistance.