



ENGLISH

platform<sup>24</sup>

# USER MANUAL – ASSISTED TRIAGE FOR CLINIC

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CLINIC V. 4.113

Manual version 7.0  
2023-05-22



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Triage24 is a certified medical device. All data is encrypted while transmitted and processed according to the GDPR and the Patient Data Act.



**Platform24 Healthcare AB**

Västra Järnväggsgatan 7, SE-111 64 Stockholm, Sweden



Consult instructions for use: eIFU provided from within the product and via manufacturers webpage.



Basic UDI-DI: 735012722P24001LR

UDI-DI: 7350127221004

Any serious incidents that have occurred in relation to the medical device should be reported to Platform24 and to the competent authority of the Member State in which the user and/or patient is established.

Paligo publication ID	11826 (UUID-c0efe6a7-c557-bc87-a3d5-2e06afd56e86)
Paligo internal publication version	7.0

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# 1. Introduction

## 1.1. About this manual

This is the User Manual for the practitioner assisted triage function in Clinic.



### **NOTE**

The User Manual might not always be fully up to date regarding all User Interface (UI) elements. For example, smaller UI elements, such as updated names for buttons, fields etc. might not in themselves produce a new version of the User Manual. All UI changes will, however, be communicated in the Release Notes at the time of the update. All warnings will always be up to date in the User Manual, and, in addition, new warnings will be communicated in the Release Notes.

## 2. Contact details

### 2.1. Manufacturer

Address     **Platform24 Healthcare AB**  
              Västra Järnvägsgatan 7  
              SE-111 64 Stockholm  
              Sweden  
Website     <https://platform24.com>

### 2.2. Technical Support

#### 2.2.1. End user support

Platform24 does not offer direct access to *end user* support. For questions, the first line of support is your on site *superusers* and trainers.

For information about the superusers in your organization, refer to your internal routines and procedures.

#### 2.2.2. Superuser support

A *superuser* is an end user with increased knowledge and responsibility about the platform on each unit.

The superuser acts as the first-line support for the end users on the device and is the one who turns to Platform24 for further support, if necessary.

For information about the superusers in your organization, refer to your internal routines and procedures.

#### Urgent cases

For urgent support cases superusers should call the Platform24 support phone number below.

Phone: +46 (0) 10-140 23 21

#### Non urgent cases

For all non urgent support cases superusers should email the support email below.

E-mail: <[support@platform24.com](mailto:support@platform24.com)>

For questions regarding additional services or modules your organization may want to buy or activate, superusers should contact their *Customer Success Manager*, (*CSM*) at Platform24.

## 2.3. Feedback and questions regarding the user manual

For feedback and questions regarding the user manual, email the user documentation support email below.

E-mail: <ud.feedback@platform24.com>

### 2.3.1. Request printed version of the instructions for use

Platform24 provides the instructions for use for its products in electronic form.

If you require a paper version of the user manual, contact Platform24 via:

E-mail: <ud.feedback@platform24.com>

## 3. Symbols



CE marking



Manufacturer



Consult instructions for use



Warning



Medical Device



Translation



Unique Device Identifier

## 4. Warnings

All the warnings relevant for the Assisted triage are summarized in this chapter.



### **WARNING**

The result page from the triage as well as the practitioners own assessment must be used to give the patient a recommendation for continued treatment options.



### **IMPORTANT**

The device Triage24 does not by itself offer medical advice, possible diagnosis, or treatment recommendations, or inform/drive management of any medical condition.

If populated with medical content containing e.g., medical advice or recommendations on management, the Triage24 device can present such content to patients.



## 5. Practitioner assisted triage via Clinic

### 5.1. Introduction

This User manual describes how to use the Practitioner assisted triage function in Clinic.

The purpose of the Clinic platform is to make your work as smooth and easy as possible without compromising on medical quality. Clinic is the healthcare staff's module in the platform solution offered by Platform24, and where chat and video consultations take place.

Chat history, pictures and files sent in the platform, as well as the auto-anamnesis created during triage, and the medical record that healthcare professionals create in Clinic are handled according to the Swedish Patient Data Act (PDL), which means that the information is stored for at least 10 years, unless the responsible caregiver requests thinning of data before then. Video consultations and telephone calls in Platform24 are not saved.

Healthcare practitioners are authorized to use Clinic by the administrator of their healthcare provider or work unit.

To be able to log in to Clinic, you need an electronic identification. The most commonly used is a SITHS card. Some healthcare providers or work units use mobile BankID.

### 5.2. Assisted Triage module

Assisted triage is the module of Triage24 created for the needs of the practitioner user group performing assisted triage. This means that the practitioner assists patients in being triaged when they cannot use the patient application themselves.

### 5.3. Intended use for Assisted triage

The intended use of Assisted triage is for healthcare professionals to perform automated triage on behalf of the patient and guide patients to a suitable level of care based on their symptoms and the medical content result.

### 5.4. Intended users for Assisted triage

Healthcare professionals working within a healthcare provider.

#### Details

<u>Type of user</u>	Professional
<u>Age</u>	>20 years old
<u>Level of instructions</u>	<ul style="list-style-type: none"><li>• Licensed practitioner, ie medical doctor, nurse, psychologist</li><li>• Level <i>B1-B2</i> in the language supported in the product for the relevant market.</li><li>• User manual</li></ul>

### 5.5. Intended operational environment for Assisted triage

Application	Assisted triage in Clinic
Environment	<ul style="list-style-type: none"><li>• Home/office environment with connection to internet</li><li>• Normal ambient conditions</li></ul>

Frequency of use

Several times a day

Platform

The product is used on a standard PC with the minimum requirements:

- Hardware; dual-core processor, 4 GB RAM
- Software; latest versions of Edge, Safari, Chrome and Firefox
- Data bandwidth; 300 mbps (video) / 50 mbps (voice)
- IT security; https

## 6. Using Assisted triage

When using assisted triage healthcare practitioners are advised to combine their own professional assessments with the triage recommendation in order to guide patients into the necessary treatments or offer medical advice.



### **WARNING**

The result page from the triage as well as the practitioners own assessment must be used to give the patient a recommendation for continued treatment options.



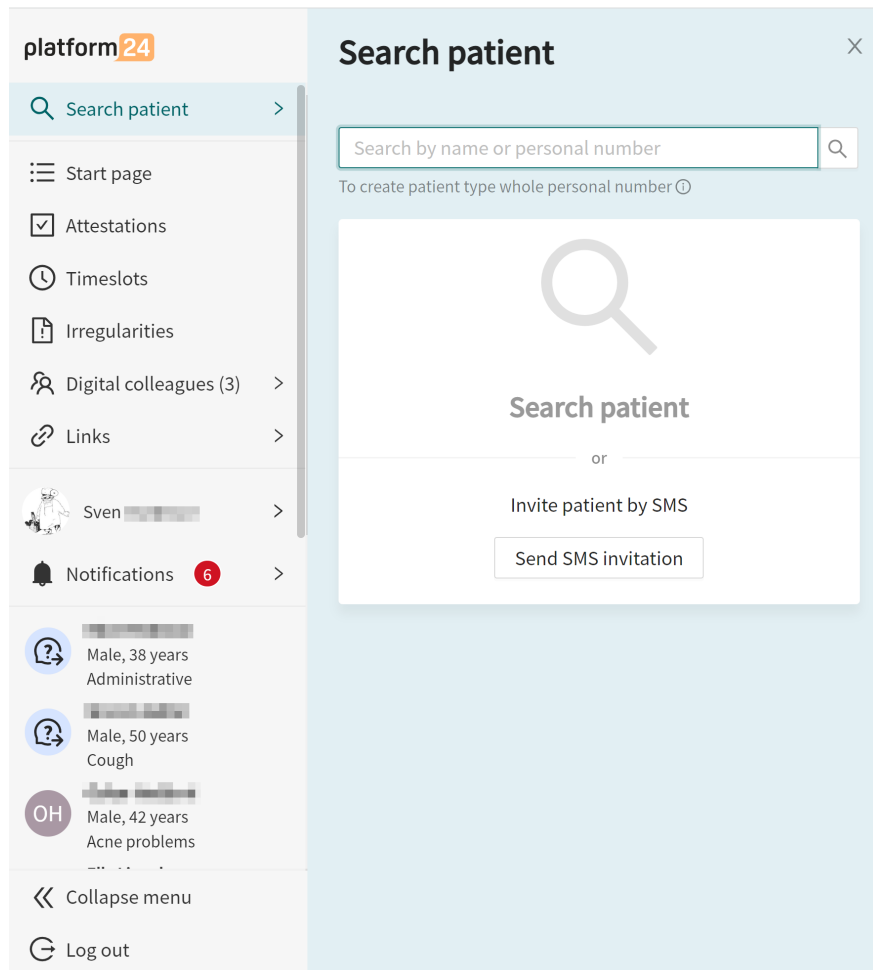
### **IMPORTANT**

The device Triage24 does not by itself offer medical advice, possible diagnosis, or treatment recommendations, or inform/drive management of any medical condition.

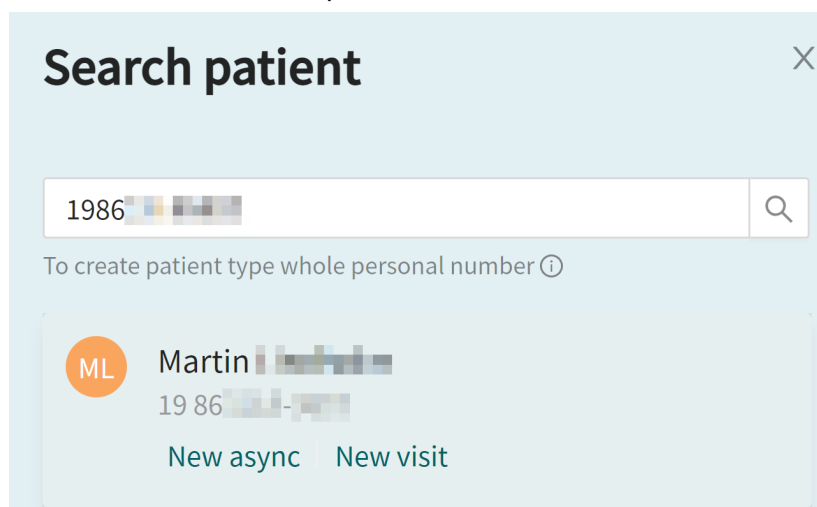
If populated with medical content containing e.g., medical advice or recommendations on management, the Triage24 device can present such content to patients.

## 6.1. Start triage

1. Go to Clinic and click on **Search patient** in the left menu bar.



2. Write the name or social security number of the patient in the **Search field** and click the search icon or press enter.
3. Click **New visit** below the patient's name in the search result.



**NOTE**

If the patient cannot be found, the patient first needs to be added to Clinic. For information on how to add a patient to Clinic, refer to the Clinic User Manual.

4. If the patient is a child, select the guardian of the child under **Guardian**. This option is only displayed if the patient is a child. When seeking care for a child, it is also possible to start the triage in Clinic via the guardian.

The screenshot shows a 'Create new visit' dialog box. Under the heading 'Who is it for?', there are two sections: 'Patient' and 'Guardian'. The 'Patient' dropdown menu is set to 'Max [redacted] (2018 [redacted] - [redacted])'. The 'Guardian' dropdown menu is set to 'Martin [redacted] (1986 [redacted] - [redacted])'. Below the dropdown, a list of guardian options is shown, with 'Martin [redacted] (1986 [redacted] - [redacted])' selected and highlighted in a dark grey bar.

5. Depending on your configuration, there are two alternatives to start the assisted triage.
  - I. By using triage as consultation type:
    - a. Click on the **Triage** button under the heading **Consultation**.

The screenshot shows the 'Create new visit' dialog box. Under the heading 'Who is it for?', the 'Patient' dropdown menu is set to 'Martin [redacted] (1986 [redacted] - [redacted])'. Below this, there is a 'Visit' section with a button labeled 'Asynchronous'. Under the heading 'Consultation', there are two buttons: 'Consult with another practitioner' and 'Triage'. The 'Triage' button is highlighted with a blue border.

- II. By using a telephone appointment as visit type:
- a. Click on the **Telephone appointment** button under the heading **Visit**.

Create new visit X

---

**Who is it for?**

**Patient**

Gunnar [redacted] (1972 [redacted]) v

---

**Visit**

Scheduled    Scheduled free    Asynchronous

Telephone appointment

**Consultation**

Consult with another practitioner

- b. Click **Submit** to confirm the telephone appointment.

Create doctor visit X

---

**Visit details:**

**Patient:** Gunnar [redacted]

**Practitioner:** Sven [redacted]


**Care Unit:** [redacted]

**Role:** Doctor

- c. Click the **Go to appointment** button.

Create doctor visit X

---



Booking completed !

d. Click the **START ASSISTED TRIAGE** button in the **Current appointment** view.

The screenshot shows the 'Current appointment' view for a patient named Gunnar. The patient's details include a gender of Male. The appointment is a 'Telephone appointment' that started on 05/04/2023 at 4:21 PM. The origin is listed as 'Non Medical Info'. There are sections for Allergies, Diagnosis, Medication, and Surgery, all of which are currently empty. A 'Notes' section contains the text 'This appointment does not have any patient interviews associated with it'. At the bottom left of the appointment view, a 'START ASSISTED TRIAGE' button is highlighted with an orange box and an arrow pointing to it.

6. Enter the search cause that describes the patient's problem in the field **Primary condition**.

The 'Assisted triage' dialog box is shown. It has a title bar with 'Assisted triage' and a close button (X). The main area contains a 'Primary condition' label above a text input field. The input field contains the text 'headache'. Below the input field is a 'Start triage' button.

7. Click **Start triage**.

## 6.2. Perform triage

The triage will now be started. Carry out the assisted triage by:

1. Ask the patient the questions that appear in the triage.

William ██████, 40 years  
Arm injury

Previous question

Chatbot

Do you think that the arm is misaligned?

+ What do we mean by misalignment?

Yes No

Select one option

2. If response options are presented, present the response options to the patient.

William ██████, 40 years  
Arm injury

Chatbot

Where are your problems? (Select all that apply.)

Armpit

Upper arm

Elbow

Forearm

Wrist

Hand

Select one or several options



- 3. Answer the questions based on the answer provided by the patient. Click **Continue** to go to the next question.

William [redacted], 40 years  
Arm injury

Chatbot

Where are your problems? (Select all that apply.)

Armpit

Upper arm

Elbow

Forearm

Wrist

Hand

Continue

- 4. If needed, click the **Previous question** button to go back and change the answer to a previous question.

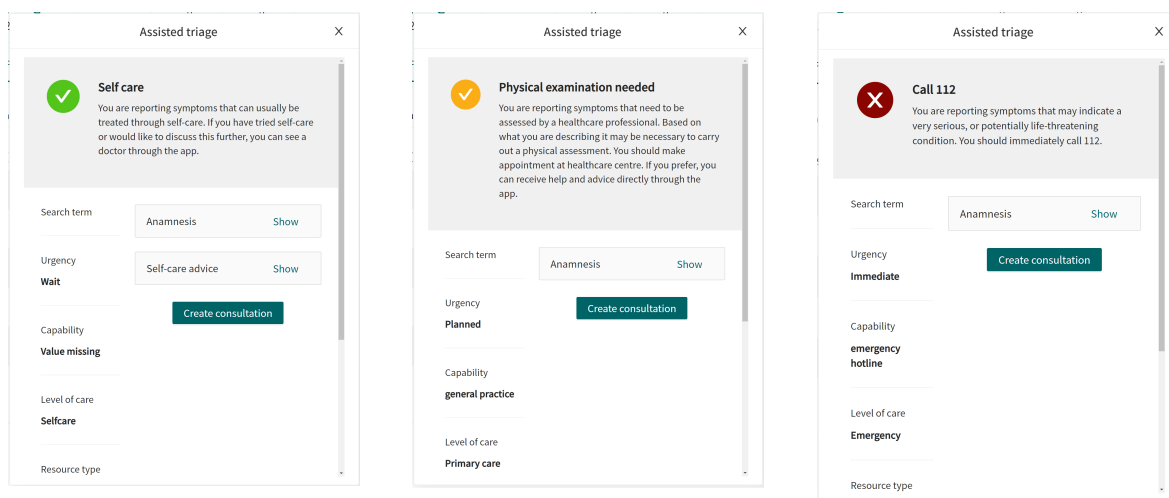
William [redacted], 40 years  
Arm injury

Previous question

## 6.3. Result from the Triage

When the triage of the patient is complete, the results page is presented.

See image below for three examples of results pages.



### 6.3.1. The recommendation

#### The recommendation icon

The patient recommendation is shown in a gray box on the top of the results page.

The icon next to the patient recommendation text appears in either green, yellow, or red. The color indicates the degree of urgency of the outcome:

Image	Colour	Urgency	Explanation
	Green	Non urgent	Usually ailments that can be treated by the patient via self care Non urgent cases that needs to assessed by a practitioner.
	Yellow	Medium urgency	Depending on the case patients should get an appointment: <ul style="list-style-type: none"> <li>• Next available appointment during working hours</li> <li>• Within 24 hours</li> <li>• Urgently</li> </ul>
	Red	Urgent	Seek care Immediately Patients are exhibiting symptoms that may be serious and/or life threatening and are urged to call 112

## The recommendation title

The title of the recommendation is the bold text at the top of the gray box. It briefly describes the recommendation to the patient based on the result of the triage.



### **Physical examination needed**

You are reporting symptoms that need to be assessed by a healthcare professional. Based on what you are describing it may be necessary to carry out a physical assessment. You should make appointment at healthcare centre. If you prefer, you can receive help and advice directly through the app.

## The recommendation text body

The recommendation text is the piece of text under the recommendation title. It presents the recommendation that the patient would have received if the patient had answered the triage via the standard patient application.

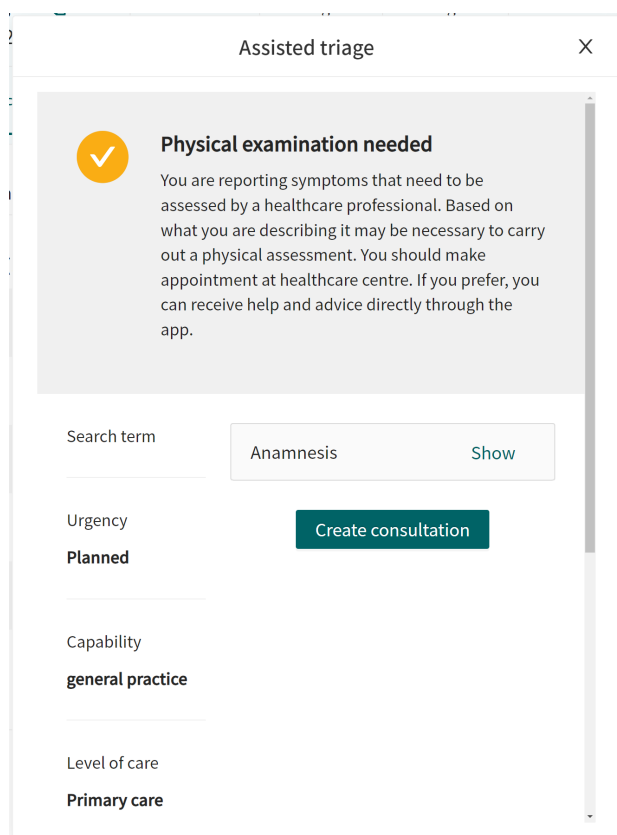


### **Fysisk undersökning behövs**

Du uppger symptom som borde bedömas av vårdpersonal. Utifrån det du beskriver kan en fysisk undersökning behövas. Du bör boka tid på vårdcentral. Om du föredrar så kan du få hjälp och råd direkt i appen.

### 6.3.2. Detailed results

The values from the outcome that the patient received are specified on the left side of the results page (see image below for examples) and present the current values for the outcome from the triage:



**Possible outcome attributes and their meaning:**

**Urgency level**

How quickly the patient should receive care:

- I. Immediately
- II. Urgently
- III. Nearest 24 hours
- IV. During office hours in the near future
- V. Wait / defer

**Care type**

- Online recommended** if the patient is recommended to be managed via online visits
- Online possible** if the patient can be managed via online visits
- Offline** if the patient should be handled offline

<b>Care level</b>	<ul style="list-style-type: none"><li>• Stop</li><li>• Online</li><li>• Counseling</li><li>• Primary care</li><li>• Specialist care</li><li>• Emergency Care</li><li>• Earlier caregiver / care contact</li><li>• Self care</li></ul>
<b>Profession</b>	<p>Which type of healthcare practitioner (profession) the patient is recommended to get in touch with according to the partner's rules for the business. Examples of professions:</p> <ul style="list-style-type: none"><li>• Occupational therapist</li><li>• Pediatrician</li><li>• Biomedical analyst</li><li>• Psychologist</li><li>• Dentist</li><li>• Ophthalmologist</li><li>• Speech therapist</li><li>• Midwife</li><li>• Assistant nurse</li></ul>
<b>Competence</b>	<p>What skills may be needed for the patient's continued management. Examples of competencies:</p> <ul style="list-style-type: none"><li>• Gynecology</li><li>• Addiction care</li><li>• Emergency room</li><li>• Youth</li><li>• Home health care</li></ul>
<b>Appointment priority</b>	<p>The priority that the patient would have received in an online case created in Clinic. The priority is a number between 1-5, where 1 is the highest priority and 5 the lowest.</p>

## Expandable fields

Further expandable fields are also displayed on the results page. The following fields are expandable and are presented by clicking **View**.

The fields can be minimized again by clicking **Hide**.

<b>Anamnesis</b>	Here, an automatically summarized anamnesis text is presented. The anamnesis text is based on the answers the patient has given during the triage. This text can be copied into the patient's medical record.
<b>Flags</b>	Here special "flags" assigned to the patient during the triage are presented. Flags contain important information that should be taken into account by the practitioner. For example, if Covid symptoms have been described.

**Exit care advice**

Here, additional information or advice is presented for the specific outcome that the patient receives via the triage.

**NOTE**

This feature is optional and only available for partners who have activated it.

Contact the your *super user* or *customer success manager* for further information.

**Self care advice**

If the triage of the patient has resulted in a recommendation that includes a self-care advice, it will be presented here

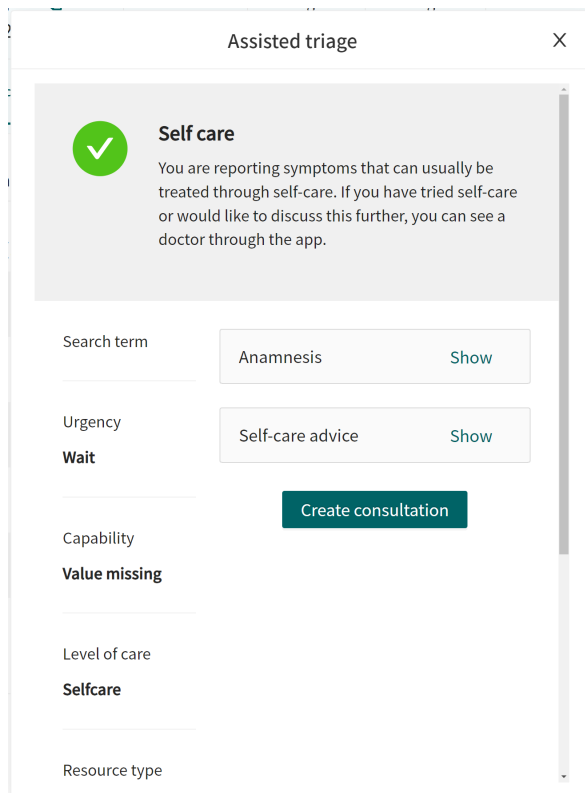
**Create consultation****NOTE**

This feature is optional and only available for partners who have activated it.

Contact the your *super user* or *customer success manager* for further information.

If the feature is enabled, the button **Create consultation** is visible at the bottom of the results page.

1. Click on **Create consultation** , a consultation can be created with the relevant healthcare professional.



2. Select the relevant healthcare professional, and create a consultation.

## 6.4. End assisted triage



### WARNING

The result page from the triage as well as the practitioners own assessment must be used to give the patient a recommendation for continued treatment options.

1. To cancel and close the box for assisted triage, click on the **X** in the upper right corner.

Assisted triage X

**Online consultation**  
You are reporting symptoms that need to be assessed by a healthcare professional. You can discuss the issue further with a doctor directly here in the app.

Search term: Anamnesis Show

Urgency: **Planned** Create consultation

Capability: Value missing

Level of care: **Online**

Resource type

2. To confirm that you want to close the assisted triage, click **Yes, close**. If you do not want to close the assisted triage, click **No, don't close**.

**Close assisted triage**  
Are you sure you want to close the assisted triage?

No, don't close Yes, close



## 7. Versions

Versions of the Assisted triage for Clinic User Manual of Triage24.

#	Date	Description	Created by	Reviewed by
1.0	2021-11-30	1st version.	Lovisa Lundin	Nicole Kvist
2.0	2022-01-17	Update	Nicole Kvist	Lovisa Lundin
3.0	2022-01-24	Updated intended use, profile and environment.	Lovisa Lundin	Nicole Kvist
4.0	2022-01-25	Updated intended use, profile and environment	Nicole Kvist	Lovisa Lundin
5.0	2022-04-07	Transfer of the content from the Word file to Paligo: Translation from SE to EN. Improvements and rewrites as necessary for the new format. Adaptations to switching to EN as primary source language.	Eva Daskalaki	Nicole Kvist
6.0	2022-10-31	Triage24 MDR certification version. Corrected typos.	Helena Nilsson	Nicole Kvist Oskar Höllgren
7.0	2023-05-22	<ul style="list-style-type: none"> <li>• Clinic24 changed to Clinic.</li> <li>• Images of the Clinic user interface replaced with new Platform24 logotype.</li> <li>• Changes in the 6.1 Start triage section to reflect changes in UI. It is now possible to also start the triage from the child in Clinic (and not only the guardian), as well as to start the triage via a telephone appointment.</li> <li>• As it is now possible to seek care directly from the child in Clinic, the IMPORTANT-note about initially searching from the guardian was removed.</li> <li>• Changes in the 6.2 Perform triage section to reflect the new button names (Continue and Previous question).</li> <li>• Text from Abstract moved into an Introduction chapter. Clarifying note added to the Introduction chapter regarding updates in the manuals.</li> <li>• Information about how to report serious incidents added to page 2.</li> </ul>	Helena Nilsson	Nicole Kvist