ENGLISH

platform24

User Manual – Assisted triage for Clinic

Clinic v. 4.113

Manual version 8.0
2024-03-27

Copyright © 2024 Platform24 Healthcare AB

CE 2862

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 Järnvägsgatan 7, SE-111 64 Stockholm, Sweden

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

UDI

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	8.0

Table of Contents

1. Introduction 4
1.1. About this manual 4
2. Contact details 5
2.1. Manufacturer 5
2.2. Support 5
2.2.1. End user support 5
2.2.2. Superuser support 5
2.3. Feedback and questions regarding the User Manual 6
2.3.1. Request printed version of the Instructions for Use 6
3. Definition of symbols and precautions 7
3.1. Symbols definition 7
3.2. Precautions definition 7
4. Safety precautions 9
5. Practitioner assisted triage via Clinic 10
5.1. Introduction 10
5.2. Assisted triage module 10
5.3. Intended use for Assisted triage 10
5.4. Intended users for Assisted triage 10
5.5. Intended operational environment for Assisted triage 10
6. Using Assisted triage 12
6.1. Log in and log out 12
6.1.1. Log in to Clinic 12
6.1.2. Log out of Clinic 12
6.2. Start triage 13
6.3. Perform triage 17
6.4. Result from the triage 19
6.4.1. The recommendation 19
6.4.2. Detailed results 20
6.5. End assisted triage 24
7. Glossary 25
8. Versions 26

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. 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>`

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: <support@platform24.com>

2.3.1. Request printed version of the Instructions for Use

The Instructions for Use (IFU) information is included in the User Manual for each product and available in digital format in the user interface.

If you require a paper version of the User Manual, contact Platform24 via:

E-mail: <support@platform24.com>

3. Definition of symbols and precautions

3.1. Symbols definition

CE 2862 — CE marking

Manufacturer

Consult instructions for use

Warning

MD — Medical Device

UDI — Unique Device Identifier

3.2. Precautions definition

This section describes the different types of precautions that are used in the User Manuals.

WARNING
A warning indicates a hazardous situation that, if not avoided, could result in death or serious injury.

CAUTION
A caution indicates a hazardous situation that, if not avoided, could result in minor or moderate injury.

IMPORTANT
An important precaution indicates information that is important for the user to take note of.

NOTE
A note indicates information that the user should to take note of.

TIP
A tip indicates recommendations for the user.

4. Safety precautions

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

WARNING
The practitioner's own assessment must be used together with the result page from the triage to give the patient a recommendation for continued treatment options.

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 local laws and regulations. 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.

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

Type of user	Professional
Age	>20 years old
Level of instructions	• Licensed practitioner, ie medical doctor, nurse, psychologist • Level *B1-B2* in the language supported in the product for the relevant market. • User manual

5.5. Intended operational environment for Assisted triage

Application	Assisted triage in Clinic
Environment	• Home/office environment with connection to internet • Normal ambient conditions
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 or Firefox

- Data bandwidth; 300 kb/s (video) / 50 kb/s (voice)
- IT security; https

6. Using Assisted triage

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

WARNING
The practitioner's own assessment must be used together with the result page from the triage to give the patient a recommendation for continued treatment options.

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

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

6.1. Log in and log out

6.1.1. Log in to Clinic

1. Open the browser and enter the URL https://clinic.platform24.se.
   The recommended web browsers are **Google Chrome** or **Microsoft Edge**.

   NOTE
   Some customers might have a unique environment link. Talk to your superuser at Platform24 if the link does not work.

2. Log in using your selected authentication method.

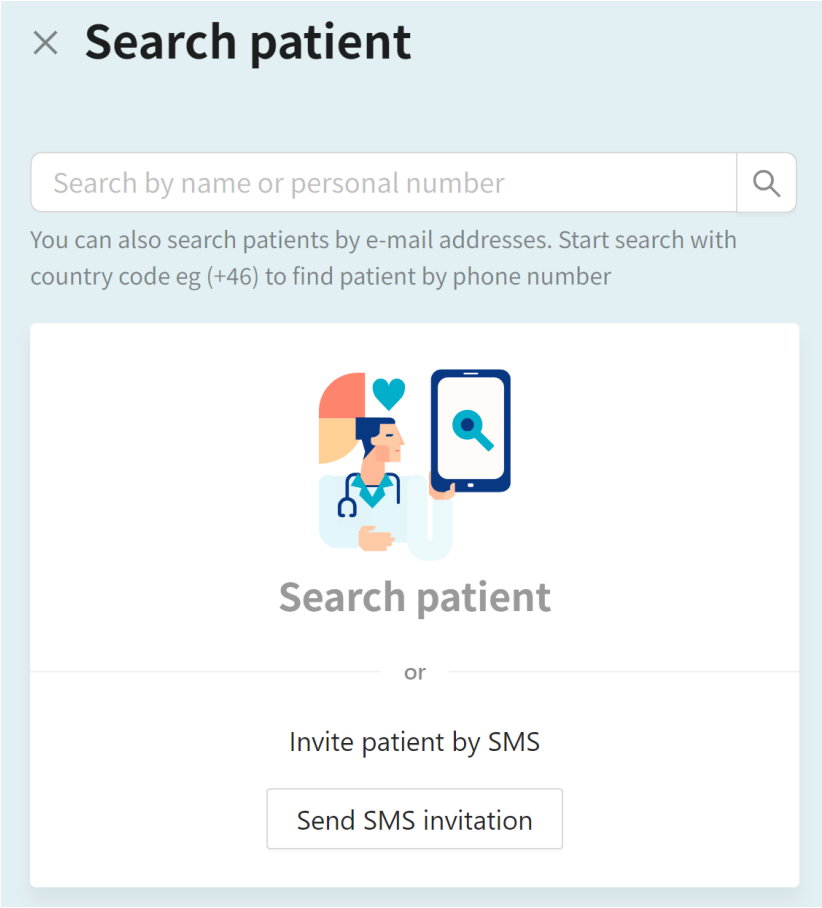
   NOTE
   The selected authentication method is customer-specific. Talk to your superuser if you are unsure about the login process at your clinic.

6.1.2. Log out of Clinic

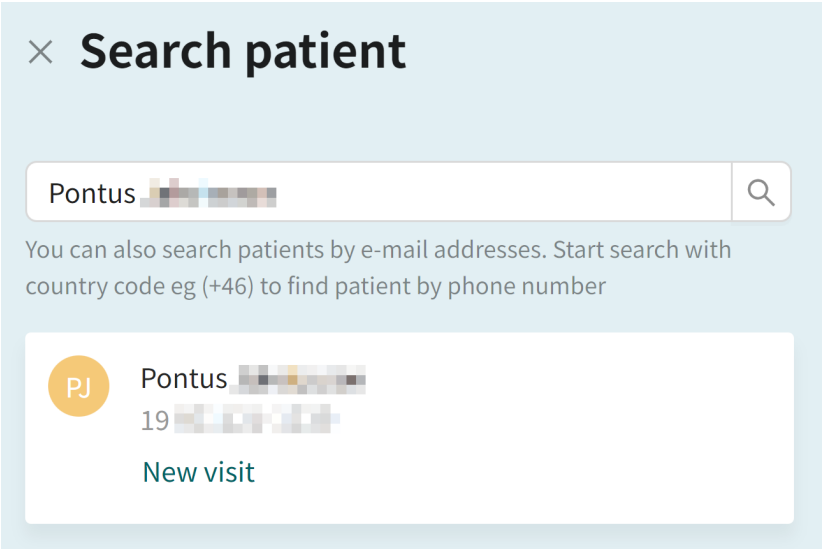
1. Click **Log out** in the lower left corner.

6.2. Start triage

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

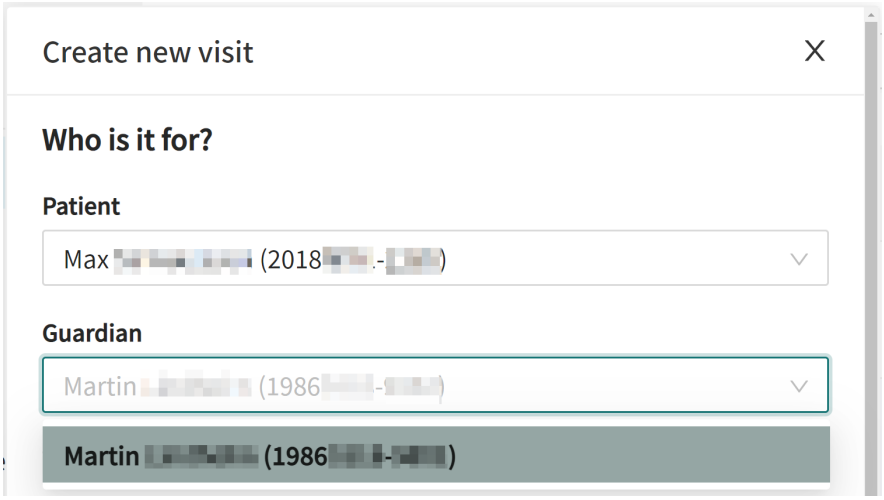


2. Enter a name, *unique personal identifier* or a phone number (including the country code) in the search field.
3. Click the search icon or press Enter.
4. Click **New visit** below the patient's name in the search result.

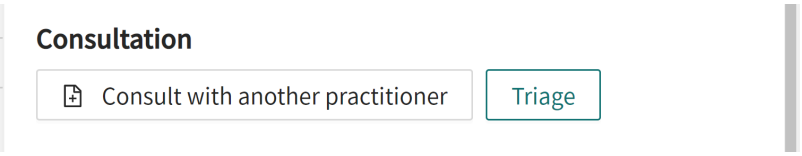


> **NOTE**
> If the patient cannot be found, the patient first needs to be added to Clinic. For information on how to add a patient to Clinic, refer to the Clinic User Manual.

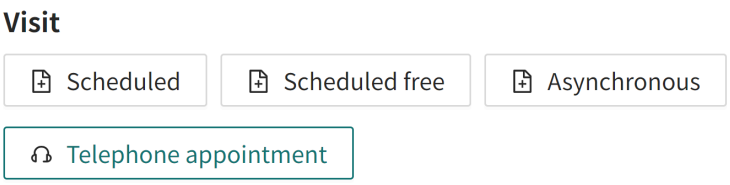
5. If the patient is a child, select the guardian of the child under **Guardian**. This option is only displayed if the patient is a child. When seeking care for a child, it is also possible to start the triage in Clinic via the guardian.



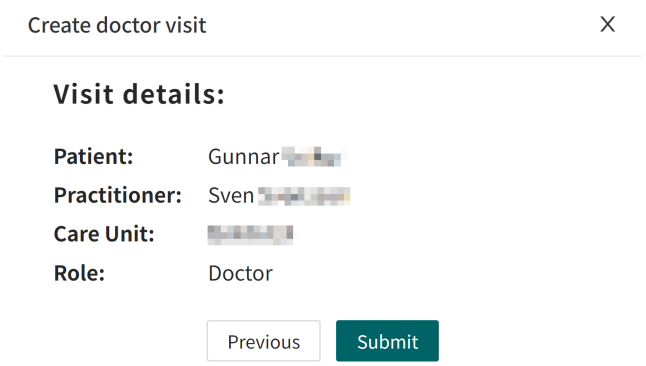
6. Depending on your configuration, there are two alternatives to start the assisted triage.
   I. By using triage as consultation type:
      a. Click on the **Triage** button under the heading **Consultation**.



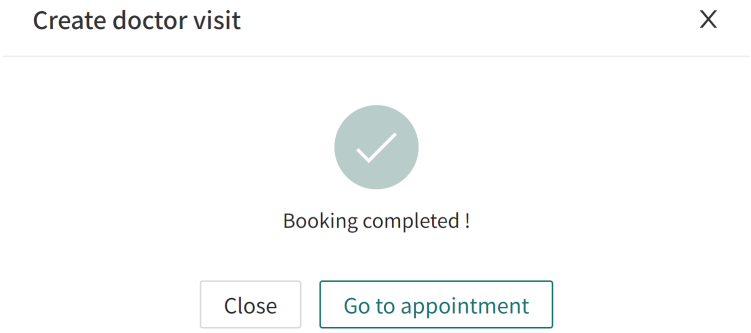
   II. By using a telephone appointment as visit type:
      a. Click on the **Telephone appointment** button under the heading **Visit**.



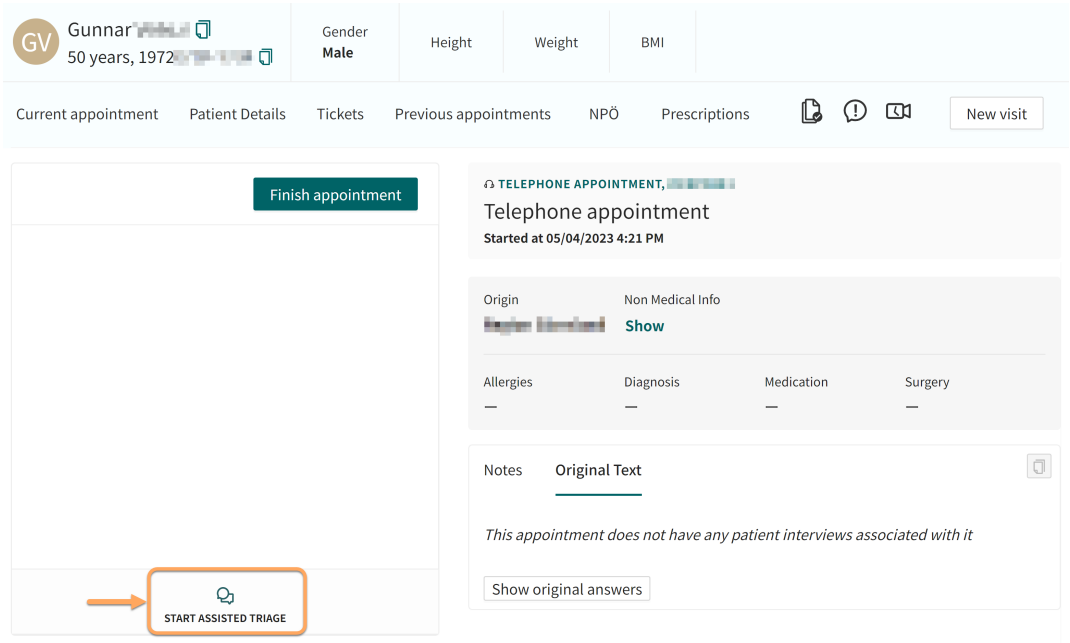
b. Click **Submit** to confirm the telephone appointment.



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



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



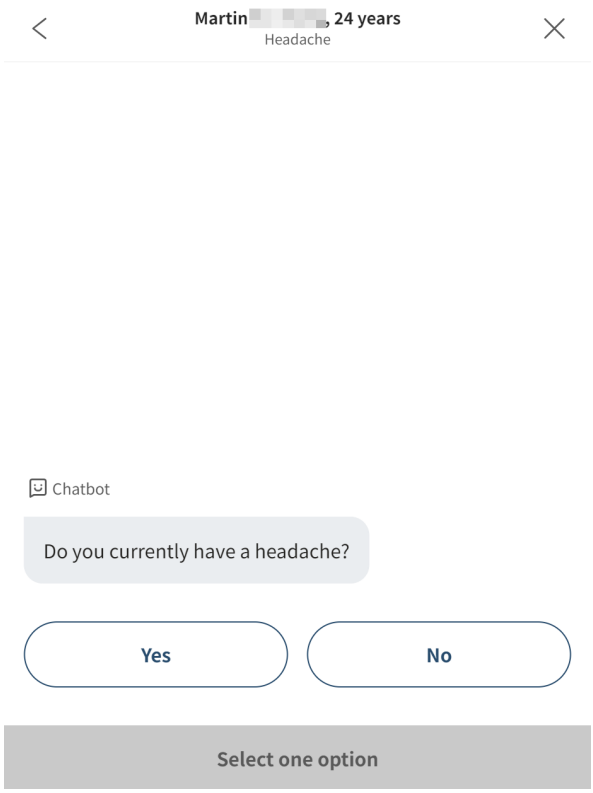
7. Enter the search cause that describes the patient's problem in the **Primary condition** field.

8. Click **Start triage**.

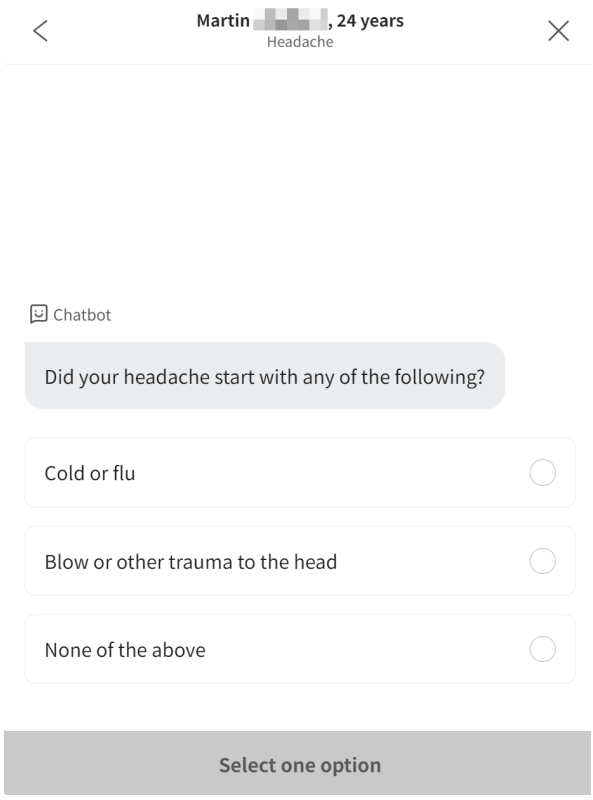
6.3. Perform triage

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

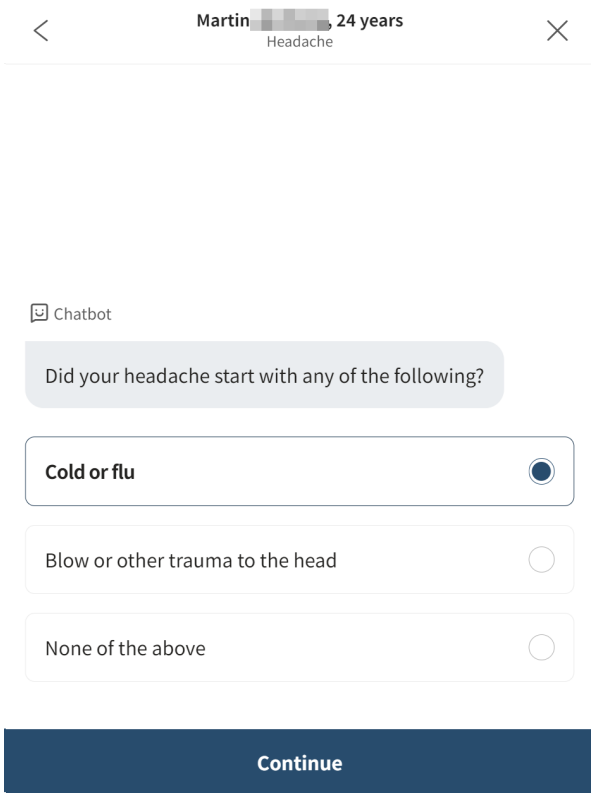
1. Ask the patient the questions that appear in the triage.



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



3. Answer the questions in the triage based on the patient's answer. Click **Continue** to go to the next question.

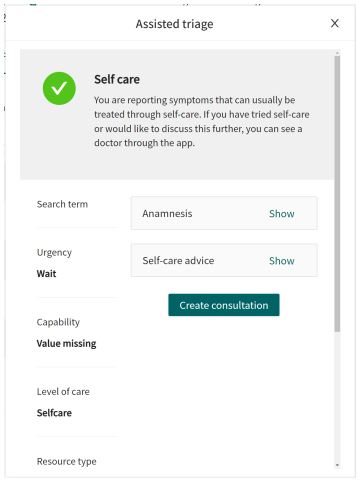


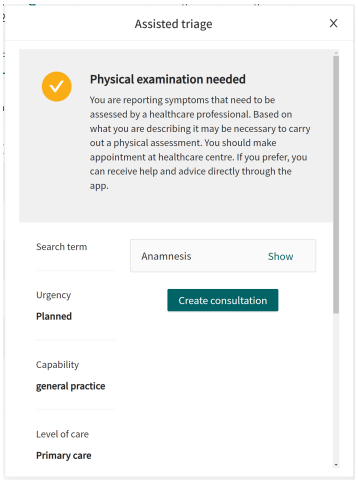
4. If you want to change the answer to a previous question, click the previous question icon in the upper left corner.

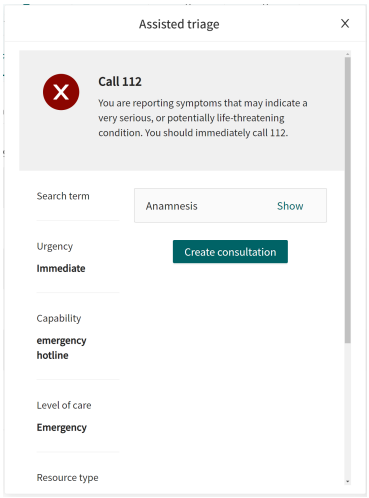
6.4. Result from the triage

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

See image below for three examples of results pages.

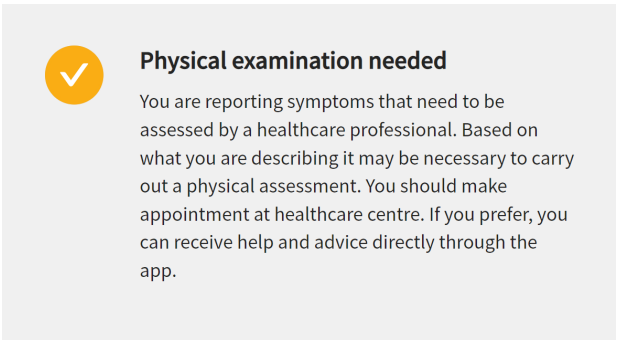






6.4.1. The recommendation

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



The recommendation icon

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:

Icon	Color	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: • Next available appointment during working hours • Within 24 hours • Urgently

Icon	Color	Urgency	Explanation
	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

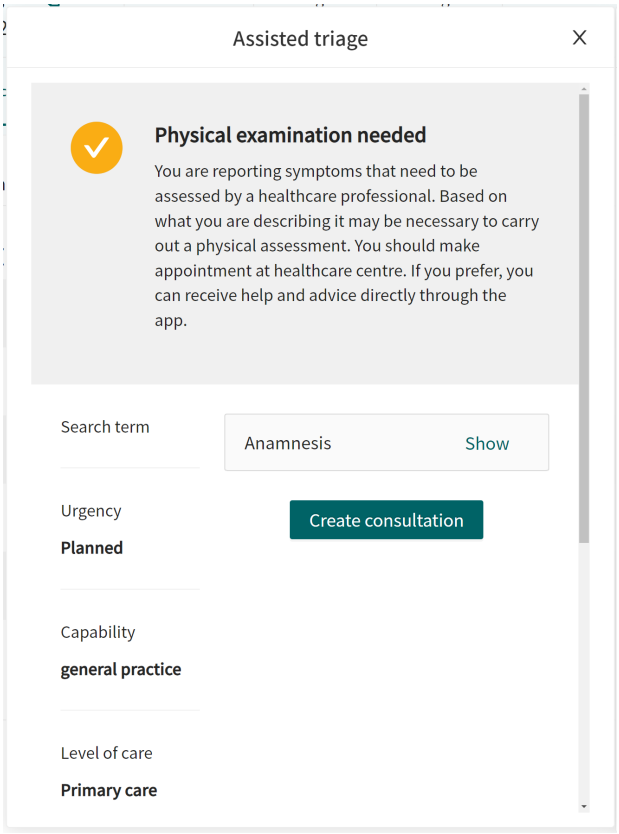
The title of the recommendation is the bold text at the top of the gray box. It briefly describes the recommendation to the patient based on the result of the triage.

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.

6.4.2. 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

Care level

- Stop
- Online
- Counseling
- Primary care
- Specialist care
- Emergency Care
- Earlier caregiver / care contact
- Self care

Profession

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:

- Occupational therapist
- Pediatrician
- Biomedical analyst
- Psychologist
- Dentist
- Ophthalmologist
- Speech therapist
- Midwife
- Assistant nurse

Competence

What skills may be needed for the patient's continued management. Examples of competencies:

- Gynecology
- Addiction care
- Emergency room
- Youth
- Home health care

Appointment priority

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.

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**.

Anamnesis 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.

Flags 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 your superuser or Customer Success Manager for further information.

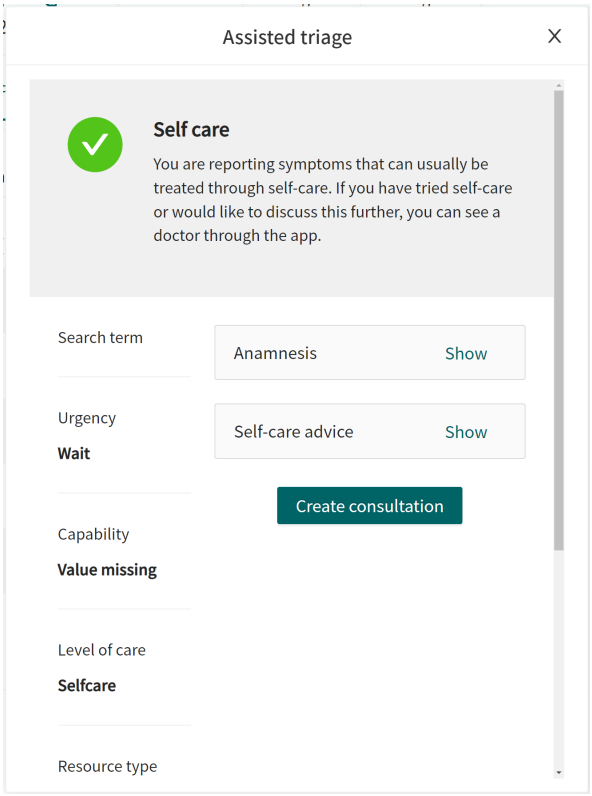
Self care advice If the triage of the patient has resulted in a recommendation that includes a self-care advice, it will be presented here

Create consultation

> **NOTE**
> This feature is optional and only available for partners who have activated it.
>
> Contact your superuser 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** to create a consultation with the relevant healthcare professional.

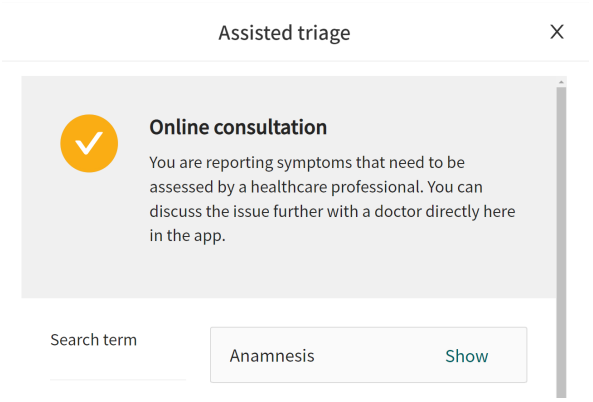


2. Select the relevant healthcare professional, and create a consultation.

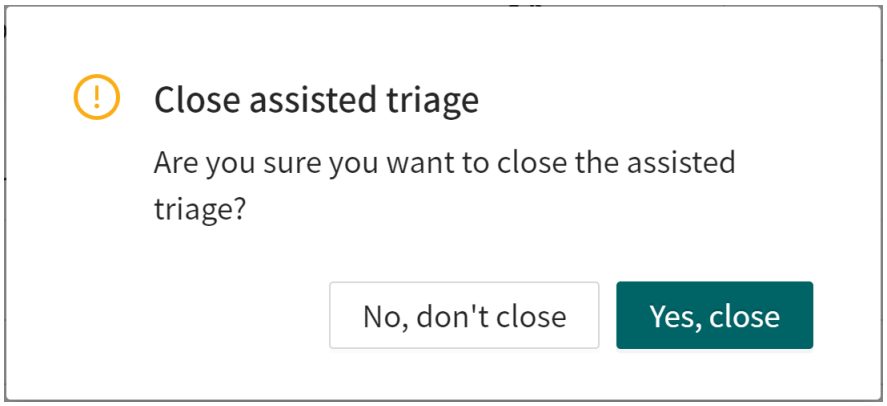
6.5. End assisted triage

WARNING
The practitioner's own assessment must be used together with the result page from the triage 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.



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**.



7. Glossary

Terms that are important and to be aware of

Clinic	The healthcare practitioner's platform, where you receive and communicate with the patient.
superuser	Those at your care unit who are very familiar with and know how to use Clinic's functions. Contact your superuser if you have questions about the functions in Clinic.
unique personal identifier	For practitioners: can be for example e-mail, HSA-ID For patients: can be for example e-mail, personal identity number, insurance number, BSN

8. Versions

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

#	Date	Description
1.0	2021-11-30	1st version.
2.0	2022-01-17	Update
3.0	2022-01-24	Updated intended use, profile and environment.
4.0	2022-01-25	Updated intended use, profile and environment
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.
6.0	2022-10-31	Triage24 MDR certification version. Corrected typos.
7.0	2023-05-22	• Clinic24 changed to Clinic. • Images of the Clinic user interface replaced with new Platform24 logo-type. • 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. • 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. • Changes in the 6.2 Perform triage section to reflect the new button names (Continue and Previous question). • Text from Abstract moved into an Introduction chapter. Clarifying note added to the Introduction chapter regarding updates in the manuals. • Information about how to report serious incidents added to page 2.

#	Date	Description
8.0	2024-03-27	Main updates are: • Wording in the manual changed to be applicable for all markets. For example, the term "unique personal identifier" is used instead of social security number. • Support email for User Manuals updated in Chapter 2. • *Chapter 3 Symbols* updated to also contain a definition of the precautions in the User Manuals. • *Chapter 4 Warnings* renamed to Safety precautions. • Clarifications in *Chapter 6 Using Assisted triage* that healthcare practitioners must combine their own professional assessments with the triage recommendation. • Clarifications in Warning and Note in the introduction to Chapter 6, where the word order has changed to emphasize that the practitioner's own assessment must be used together with the result page from the triage. • Section about logging in and out of Clinic added in Chapter 6. • Updated images and text in *Section 6.3. Perform triage*. • Glossary chapter added.