



ENGLISH

platform²⁴

USER MANUAL – MANAGE

MANAGE V3.95

Manual version 7.0
2024-04-03



Copyright © 2024 Platform24 Healthcare AB



Platform24 Healthcare AB

Västra Järnvägsgatan 7, SE-111 64 Stockholm,
Sweden



Consult instructions for use: eIFU provided from
within the product and via manufacturers web-
page.

Paligo publication ID	13120 (UUID-ae015f7c-6993-28d0-c6f2-5dd238172fdb)
Paligo internal publication version	7.0

Table of Contents

1. Introduction	5
1.1. About this manual	5
2. Contact details	6
2.1. Manufacturer	6
2.2. Support	6
2.2.1. End user support	6
2.2.2. Superuser support	6
2.3. Feedback and questions regarding the User Manual	6
3. Symbols definition	7
4. Warnings	8
5. About Manage	10
5.1. What is Manage?	10
5.2. Manage functionality	11
5.3. Locating Manage	11
5.3.1. Platform24 environments	11
5.4. Log in to Manage	12
5.5. Log out of Manage	16
6. Working in Manage	17
6.1. Main menu	17
6.2. Change management and tracking	18
6.3. Sending changes for review to Production	19
7. Configurations and settings for Origins in the Patient app	22
7.1. Adding a new Patient app/origin	22
7.2. Editing a Patient app/origin	23
7.2.1. Basic details	24
7.2.2. Menu items	25
7.2.3. Alerts	28
7.2.4. Offline flow	28
7.2.5. Customizations	29
7.2.6. Text content	30
7.2.7. Toplist	31
7.2.8. Rules	33
8. Configurations and settings for care units in Clinic	38
8.1. Basic details	39
8.2. Customizations	39
8.3. Phrases	40
9. Administering users in Platform24	41
9.1. Add a new user	41
10. Administering roles and authorizations for Manage	45
11. Administering roles and authorizations for Clinic	47
11.1. Preparations	47
11.1.1. Appoint an administrator for the care unit	47
11.1.2. Inform Platform24 about the appointed administrator	47
11.1.3. Before training and go-live	47
11.1.4. Booking tickets for other care units	48
11.1.5. Authorizations for booking to another care unit	48
11.2. Adding authorizations	48
11.2.1. Practitioner roles	49
11.2.2. Add a practitioner role	49
11.2.3. Administrative roles	54
11.2.4. Add an administrative role	55
11.2.5. Updating a role to be primary for a user	60
11.2.6. Remove roles for a user	62

11.3. Autophrases 64

 11.3.1. Adding new autophrases 65

 11.3.2. Editing and deleting autophrases 68

12. Versions 71

13. References 73

1. Introduction

1.1. About this manual

This is the User Manual for the configuration of users and patient flows in the apps included in Platform24.



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>

3. Symbols definition



Manufacturer



Consult instructions for use



Warning

4. Warnings



WARNING

When the product is in **active mode** Manage administers Clinic in which the care staff receives real patients, and the patient app in which real patients make their digital care journey.



WARNING

All changes regarding configuration (adaptations, texts, rules, medical content, etc.) should undergo a review process before the changes are activated in the production environment.



WARNING

The Production environment is live so any changes can affect real patient-flows and care unit settings.



WARNING

All changes made using Manage can affect the patient flow and the recommendation to the patient.

There are high demands on persons who use Manage to configure settings. These users need basic training in the fundamentals of how the tool works and also need to read this manual for further understanding of functionality.



WARNING

The responsibility for changes to the partner's configuration lies with the partner who makes the changes.

This also means that the responsibility to test that the changes work as intended, lies with the partner.



WARNING

To ensure a safe patient flow, make sure to test all changes that have been made and identify any consequences of the changes.

**WARNING**

It is important that users are assigned the correct Role. Users with the wrong Role can cause unwarranted patient risks.

**WARNING**

Assign as few roles as possible to each user.

Different roles can access different types and amounts of patient information, meaning that with each added role the amount of patient information the user can access increases. To protect patient integrity, each user should only have access to the information absolutely necessary to perform their work.

5. About Manage

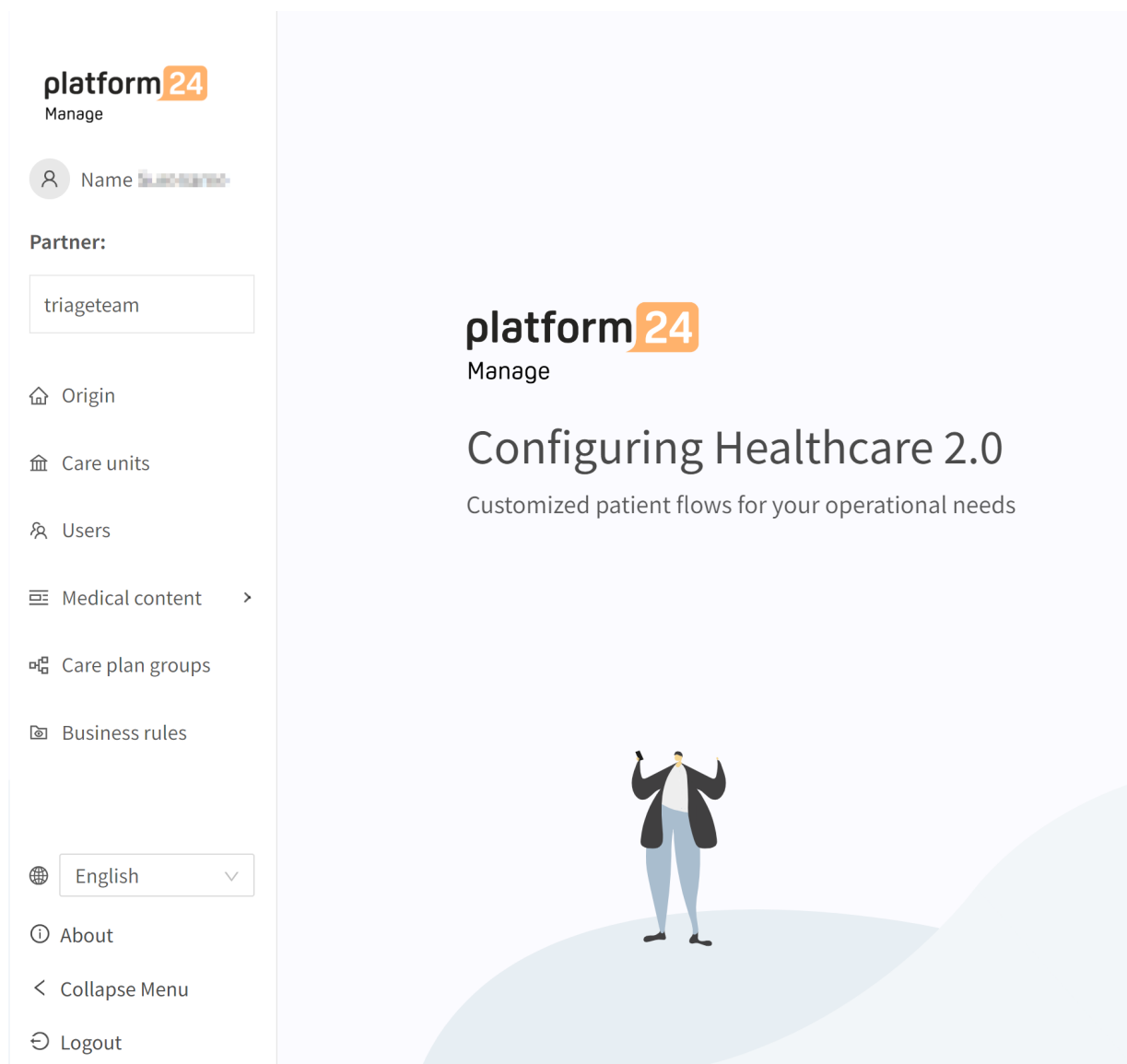
5.1. What is Manage?

Manage is an application where the main purpose is to administer users and configure patient flows in the patient and caregiver applications included in Platform24.

In addition to Manage, Platform24 also consists of Clinic, which is the healthcare provider view, and the patient app (or patient apps). Clinic is where the healthcare provider works, while the patient makes their digital care journey in the patient app.

Manage is the administrator interface where local administrators for the healthcare providers can administer local settings for Clinic, the patient app and the medical content used in the Triage24 product, as well as roles and permissions for users in Manage and Clinic.

This document describes what Manage is and how it can be used to set up and configure settings in Clinic, the patient app, and roles and permissions for healthcare professionals. To administer the medical content, refer to the separate manual for Content Studio ([References \[73\]](#)).



The screenshot displays the Platform24 Manage application interface. On the left is a sidebar menu with the following items: 'platform24 Manage' (with a user profile icon and name), 'Partner:' with a text input field containing 'triateam', 'Origin', 'Care units', 'Users', 'Medical content' (with a right-pointing arrow), 'Care plan groups', 'Business rules', a language dropdown menu set to 'English', 'About', 'Collapse Menu', and 'Logout'. The main content area features the 'platform24 Manage' logo at the top, followed by the title 'Configuring Healthcare 2.0' and the subtitle 'Customized patient flows for your operational needs'. At the bottom of the main area is an illustration of a person in a suit standing on a light blue wave-like shape.

5.2. Manage functionality

Manage is used to edit, configure and make changes to settings in the Patient app and to Clinic. It is also used to administer users, roles and permissions for Clinic.

Changes made in Manage will only be valid for the partner that makes the changes, which means that partners can use Manage to shape the Patient app and Clinic according to how partners' care units are set up.

The Manage tool is powerful and can fundamentally change patient- and healthcare providers' abilities to use the products and places high demands on users that edit and configure Manage. The users editing in Manage are required to have basic training in the use of Manage and to read this user manual to further understand the functionality.

Changes to settings (that do not affect user administration) are made through Manage and must be validated before the changes are used in the production environment with real patients and healthcare providers. In addition to the validation steps built into the tool, it is the responsibility of each partner to develop a validation- and test process for any changes made to the settings of the Patient app and Clinic.

When a change is made in Manage (that does not affect user administration), the changes can and should be verified in the partner's demo application of the Patient app and Clinic before being published for production.

In addition to the partner validation- and test processes, a technical review will be made of the changes when the partner considers their own validations and tests are ready for production.

The purpose of the technical review is to ensure that no changes will affect the technical conditions for the application usage. The technical review does **NOT** include, for example, a review of the content of text changes, but only that the change has been made in a way that the system can handle.

All changes made since previous changes were moved to production will be included in the technical review. Partners are recommended to continuously move changes to production to minimize the extent of the technical reviews.

5.3. Locating Manage

5.3.1. Platform24 environments

Platform24 uses two different environments:

The Demo environment

The **Demo** environment is used to freely test and try out the Patient app and Clinic while learning to use the platform. This is also the environment where all changes to the configuration are tested before they are sent on to the production environment. The links to these pages are provided by the implementation manager at Platform24.

The production environment

In the **Production** environment, all applications (Manage, Clinic and the Patient app) are in active mode.



WARNING

When the product is in **active mode** Manage administers Clinic in which the care staff receives real patients, and the patient app in which real patients make their digital care journey.

**WARNING**

All changes regarding configuration (adaptations, texts, rules, medical content, etc.) should undergo a review process before the changes are activated in the production environment.

5.4. Log in to Manage

There are two environments you can log in to in Manage; Demo and Production.

All editing of medical content is carried out in Manage's Production environment. Changes are saved in the Demo environment before users can actively decide to publish them in the Production environment for the Patient app and Clinic. Changes carried out in the Production environment are tested in the Demo environment.

Production: The Production environment is the live environment where real patients are handled by real practitioners.

**WARNING**

The Production environment is live so any changes can affect real patient-flows and care unit settings.

Demo: The Demo environment is an environment mirroring the Production environment. It is used for customer demonstrations and user training.

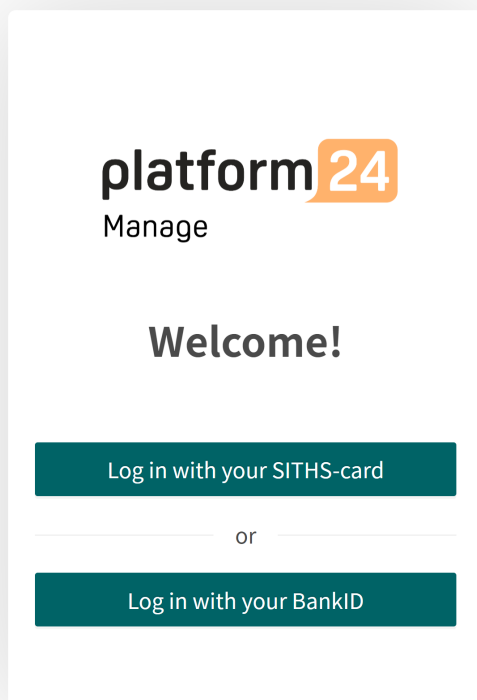
**NOTE**

Always use the Demo environment for training purposes.

1. Open the product login page in the browser.
 - a. Production: <https://manage.platform24.se/login>
 - b. Demo: <https://manage.demo.platform24.se/login>

**NOTE**

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



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



The medical device module included in this application is the Content24 module



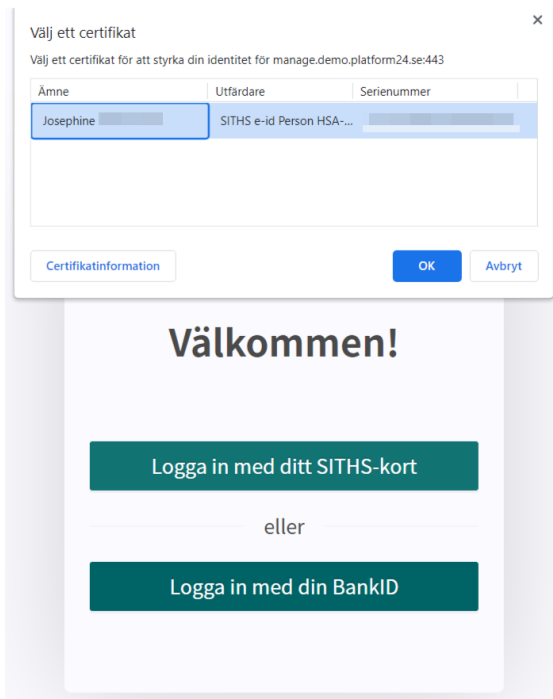
Consult instructions for use: eIFU provided from within the product



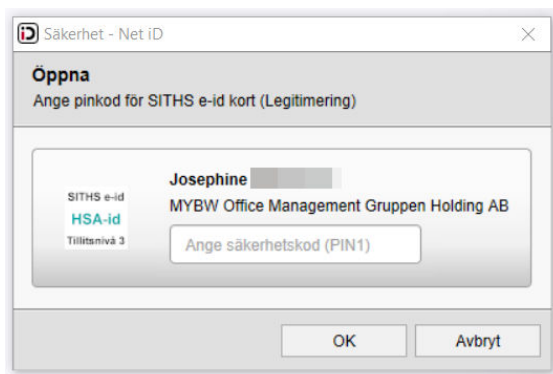
Platform24 Healthcare AB
Västra Järnvägsgatan 7
SE-111 64 Stockholm

2. Log in, via mobile BankID (Go to [Step 4](#)) or SITHS-card (Go to [Step 3](#)).

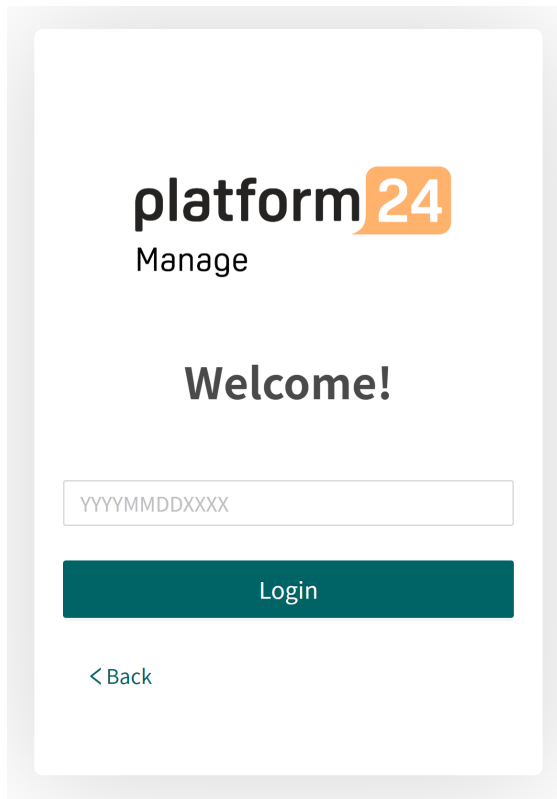
3. Log in via SITHS-card.
 - a. Click **Log in with your SITHS-card**.



- b. Choose the certificate you want to use and click **OK**.
 - c. Type the password and click **OK**.



4. Log in via **mobile BankID**.
 - a. Fill in your personal number.
 - b. Click **Login**.



platform24
Manage

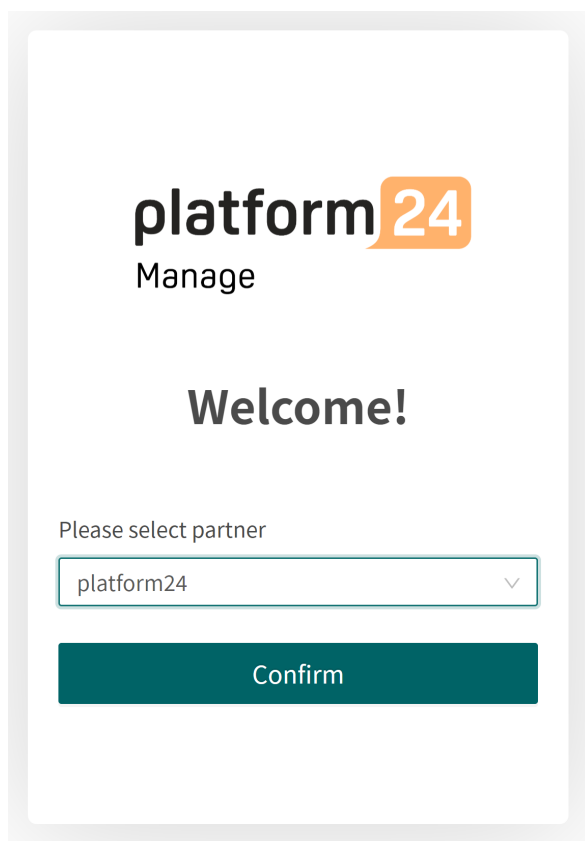
Welcome!

YYYYMMDDXXXX

Login

< Back

5. Choose the partner you wish to administrate.



platform24
Manage

Welcome!

Please select partner

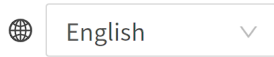
platform24

Confirm

6. Click **Confirm** to complete the login.

5.5. Log out of Manage

To log out of Manage, click **Logout** in the lower left corner.



ⓘ About

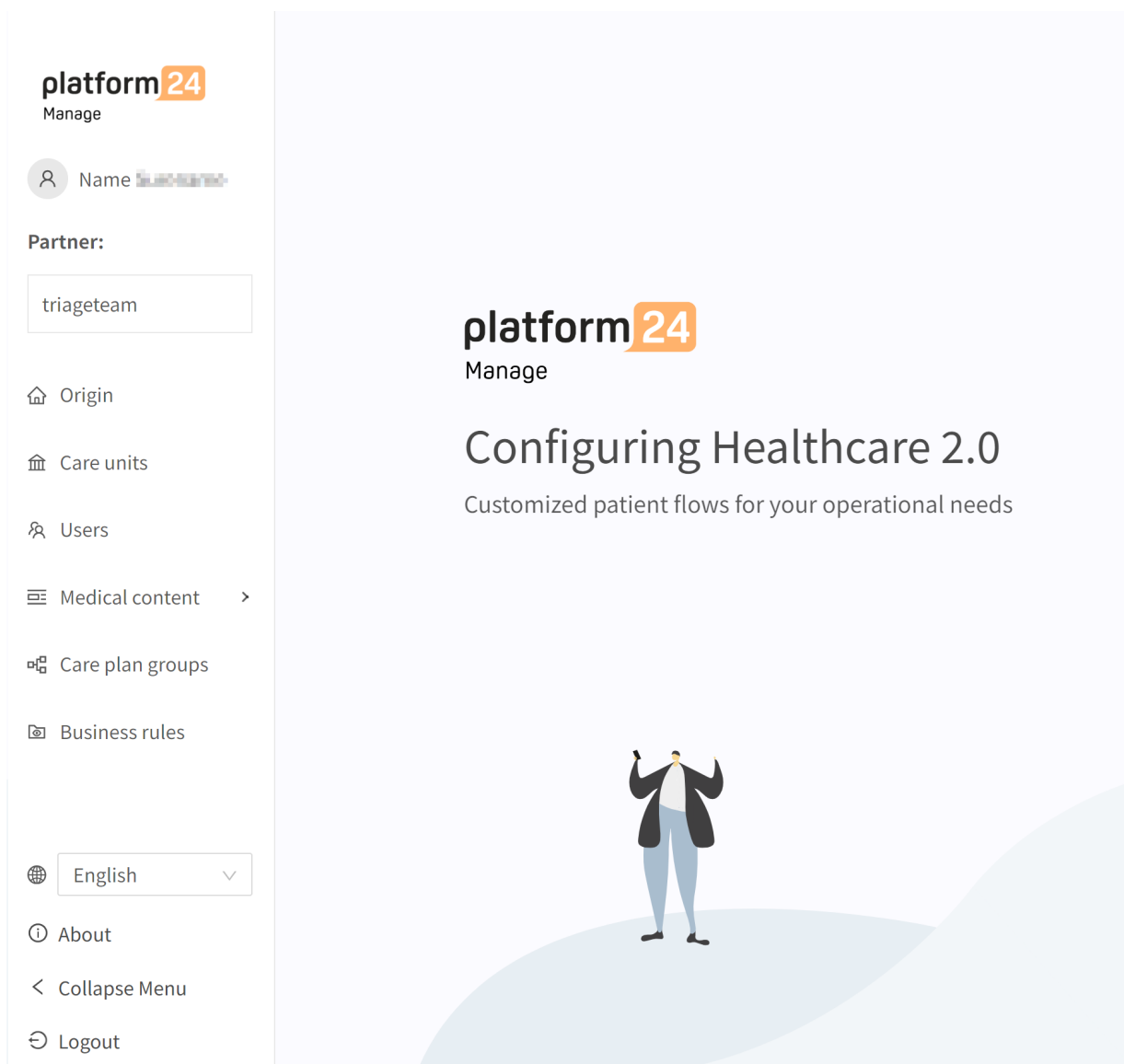
< Collapse Menu

⊞ Logout

6. Working in Manage

6.1. Main menu

When you have logged in to Manage, you will see the main menu to the left. The contents of the menu varies depending on the access of the logged in user.



Partner

If the logged in user has the permissions to edit multiple partner configurations, the **Partner** drop-down list allows the user to switch between the partners to the one they wish to edit.

Origin

Used to edit the different origins or Patient applications the partner has in the Patient application.

See [Configurations and settings for Origins in the Patient app \[22\]](#) for details.

Care units

Used to edit the care units the partner has in Clinic.

See [Configurations and settings for care units in Clinic \[38\]](#) for details.

Practitioners	Used to administer users, roles and permissions. See Administering users in Platform24 [41] for details.
Medical content	Used to edit the medical content that is used in the Triage24 product. See the separate user manual for Content Studio (References [73]) for details on how to edit the medical content.
Business rules	Used to edit business rules through the Manage User Interface. Rules are written to configure the customer flows and to allow flexibility to adjust the system towards the customer business needs. See the separate user manual for business rules in Manage (References [73]) for details on how to edit the medical content.
Language selection	Specify the language you want to use in Manage. This only affects the language in Manage.
About	Information about Manage, such as for example manufacturing information and links to user manuals.

6.2. Change management and tracking

To get traceability for changes made in Manage, all types of changes are saved with information about who made the change, when the change was done, and what the change included.

At the top and to the right of the Manage logotype, you can always see who has made the latest change for the partner currently selected in the left side menu.

Last update by Sven Svensson | May 27, 2022 11:07 AM Changes

If no status or information is visible here, it is because there have been no changes since the last time changes were deployed to production.

If there is a production deployment ongoing for the partner, it will also be listed here and no further changes can be made until the production deployment has been completed.

By clicking on **Changes** in the top area to the right, a list will fold out.

🕒 Log History 📦 Changes 37

Any changes made for the partner since the last production release will be displayed in the list. What the change was, who made the change, what date and time and whether the change has been saved correctly can be seen under **Changes**. The number of changes is displayed and listed in the red box. The most recent changes are given a status that informs users if the changes have "Passed" or "Failed". It is always the most recent (at the top) change that is valid. If the top one has passed, all the underlying ones have also been saved correctly. If "Failed" is displayed for the three most recent changes, contact the implementation manager or support at Platform24 for further help.

Last update by Åsa
Changes

Origins

Origins

Log History Changes 2

Latest deployed: 2023-05-23 09:07

Send for review

Changes

AX-00000 ifNoAbnormalBleeding includes made local
May 23, 2023 09:07 AM | Åsa | Passed

Merge branch 'master' into partner
May 23, 2023 08:23 AM | Åsa | Passed

Send to test environment

In order for changes in Content Studio/Manage to be updated in the demo application for the Patient app and Clinic (demo/test environment) one must actively upload the changes. When the button “Send to test environment” is green (within the Change log tab), there are new changes that can be sent out to the demo environment. To upload the changes made in Content Studio/Manage, click on “**Send to test environment**”. All the changes that were added since the last update to the demo environment will be sent out when clicking on that button. All updates that are listed under a change with “Passed” status have been successfully uploaded to the test environment. If the button “Send to test environment” is gray, there are no new updates to upload to the test environment.

6.3. Sending changes for review to Production

Information about previous production releases is available under the **Log history** tab. More information about what the production release involves (under **Show details**) is available here and status showing whether the production release was successful or not.

Last update by Åsa [Avatar] Ma

Origins

Origins

ID

manage24test

X

Log History Changes 2

December 2, 2022 09:51 AM	Error	Show details
August 8, 2022 02:03 PM	CANCELED	Show details
March 23, 2022 03:39 PM	Deployed	Show details
March 11, 2022 09:16 AM	Deployed	Show details
February 11, 2022 09:58 AM	Deployed	Show details

To release the changes made for the partner into production, click on **"Send for review"**, describe what changes have been made and the required impact of the changes. Send the request and wait for the technical review to be completed and it has been released into production.

Last update by Sven Svensson | October 16, 2023

Origins

Origins

ID

manage24test

X

Log History Changes 99+

Send for review

Send to test environment

Changes

Statement YesNo of type QUESTION was updated in allQuestionTypes:

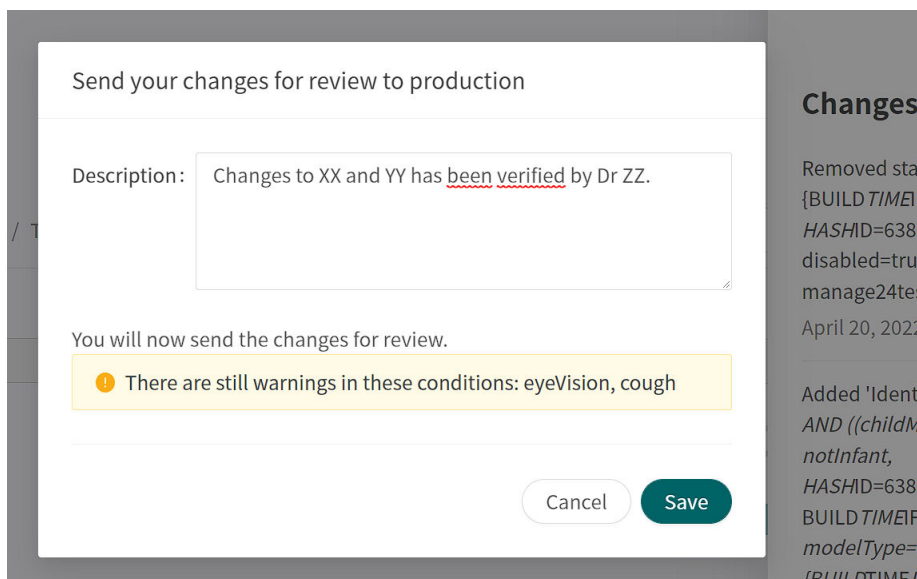
- points is updated. Skipped

October 16, 2023 11:44 AM | Sven Svensson

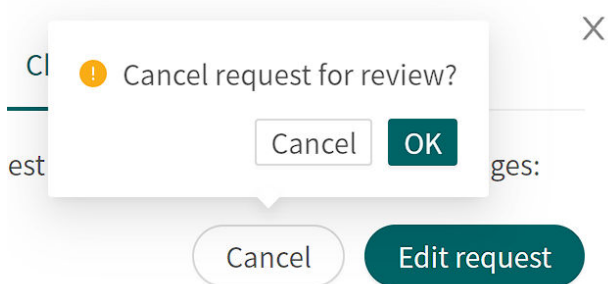
Statement Single of type QUESTION was updated in allQuestionTypes:

- * Skipped

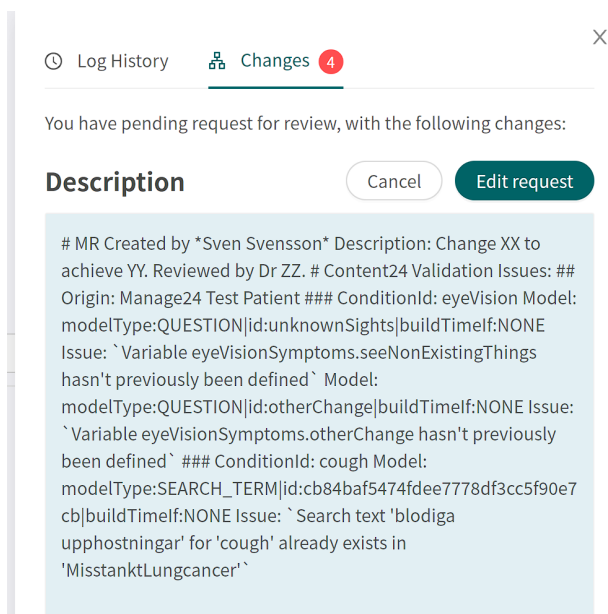
October 16, 2023 11:44 AM | Sven Svensson



You can cancel the request by clicking **Cancel**, if a review of further changes has to be carried out for the partner.



There is also an **Edit request** button next to the **Cancel** button. It allows you to add to or edit the description of the request for review to production.



7. Configurations and settings for Origins in the Patient app



WARNING

All changes made using Manage can affect the patient flow and the recommendation to the patient.

There are high demands on persons who use Manage to configure settings. These users need basic training in the fundamentals of how the tool works and also need to read this manual for further understanding of functionality.

Select **Origin** in the Manage main menu to start editing the partner's patient apps.

If the partner has several patient origins, the list of origins is displayed by clicking on the arrow ▶ in front of the name of the origin.

Origins

🏠 Origins 🔍

ID	Name towards patient	Actions
▼ 🏠 triageteam	Triage team	✎ +
🏠 triageteam-actionsv1	Triageteam - actions v1	✎ +
🏠 triageteam-actionsv2	Triageteam - actions v2	✎ +
🏠 triageteam-interviewer3	Triage origin for interviewer	✎ +



NOTE

There may be several hierarchies of origins, meaning that it is possible to expand several arrows. Underlying origins always inherit settings from the origin above, unless specific changes are made to the underlying origin.


7.1. Adding a new Patient app/origin

To add a new Patient app/origin to the partner, click the plus-sign [+](#) next to the pen [✎](#).

**NOTE**

It is good practice to do the step to add a new Patient app/origin in cooperation with the implementation manager at Platform24 who can guide you through the start-up and addition of a new Patient app/origin.

7.2. Editing a Patient app/origin

To select which Patient app/origin to edit, click on the pen  at the end of the row.

This opens up an additional **Settings** menu on the left side. The **Settings** menu groups the types of changes that can be done for the Patient app/origin.

Origin: Triage team

[Origins](#) / triageteam

- Settings
- Basic Details**
- Menu Items
- Alerts
- Offline flow
- Customizations
- Text Content
- Toplist
- Opening Hours
- Resource Types
- Online Flow
- Priority
- Prices
- Rules

Basic Details

* ID
trigeteam

Name towards patient	Name towards practitioners
<input type="text" value="Triage team"/>	<input type="text" value="Triage team"/>
BankID display name	SMS Sender
<input type="text" value="Platform24"/>	<input type="text" value="Triage team"/>
Payment Method	Email
<input type="text" value="Klarna"/>	<input type="text" value="support@trigeteam24.se"/>
Country Code	
<input type="text" value="SE"/>	
Domain	Set as primary
<input type="text"/>	<input type="radio"/>
+Add more	
* URL suffix	
<input type="text" value="test"/>	
+Add more	

7.2.1. Basic details

Basic Details is the section where the basic information is set for the patient origin. Do not forget to click **Save** Save after you have edited the information. The **Save** button is located on the bottom right side of the page, just above the **Add roles to origin** section.

Basic Details

* ID

Name towards patient	Name towards practitioners
<input type="text" value="Triage team"/>	<input type="text" value="Triage team"/>

BankID display name	SMS Sender
<input type="text" value="Platform24"/>	<input type="text" value="Triage team"/>

Payment Method	Email
<input type="text" value="Klarna"/>	<input type="text" value="support@triateam24.se"/>

Country Code

Domain	Set as primary
<input type="text"/>	<input type="radio"/>

+Add more

* URL suffix

+Add more


Basic Details fields:

ID	The ID used throughout the entire system to refer to this specific origin.
Name towards patient	The name visible to the patients in the patient app and in SMS or emails.
Name towards practitioners	The name visible to the practitioners in Clinic if a patient connects through this origin.
BankID display name	The name displayed in the BankID application to the patient when logging in to the patient app.
SMS Sender	The text shown as sender when an SMS is sent to the patient.
Payment Method	<p>Payment methods can be set to Offline or Klarna by using the drop down list.</p> <p>Offline With the Offline setting, the care providers take responsibility for invoicing.</p> <p>Klarna Using Klarna, the payment is processed before the patient can initiate an appointment.</p> <p>It is possible to use rules to set which sums to apply on different patient flows. Contact your implementation manager to configure your pricing.</p>
Email	The email address communicated to patients, e.g. in emails.
Country Code	The country the origin belongs to.
Domain	The URL or link that the patients use to reach the patient app.
URL suffix	The URL suffix can be used when there are several patient origins for an partner, and where only the last word in the URL differs between these origins.

7.2.2. Menu items

The menu items that the patient can see and choose from the patient app are administered in Manage.

It is possible to select one or more menu item choices, but keep in mind that it should be easy for the patient to understand the different choices and to reduce the need to have to scroll in the patient app.

 Settings

Basic Details

Menu Items

Alerts

Offline flow







Customizations


Text Content

Toplist

Menu Items


Customize home page entries

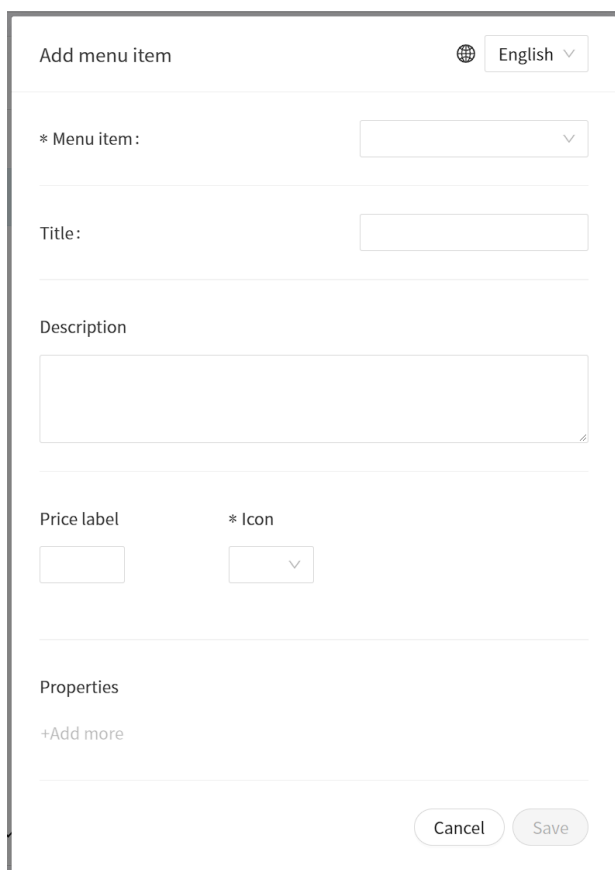
Menu item	Title	Properties	Description	Price label	Icon	Actions
RenewPrescriptions	Renew prescription		Renewal of prescriptions issued within the last 15 months			 
MeetPsychologist	Meet a psychologist		Set up a meeting with a psychologist			 



If no menu items are defined, the standard menus defined in the system will be visible in the patient app.

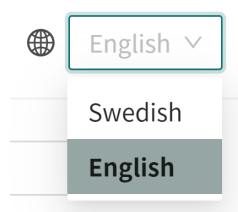
The menu items are displayed in the patient app in the same order that they are ordered in Manage. It is possible to drag the menu items up and down in the list to change the order.


To add a new menu option, click on the large green plus sign  in the bottom right of the screen. This opens the **Add menu item** window.



Fields in the Add menu item window:

Language selector



The **Language**  selector dropdown list in the top right of the screen makes it possible for the patient origin to be made available in multiple languages.



NOTE

Do not forget to set a different menu item name for each language that it is available in.

The partner languages are defined in the **Settings** tab **Customizations**.

Menu item	<p>The type of menu to add.</p> <p>The most common choice is to select searchForCondition which means that the patient can search the app themselves and then choose the search result that best fits their situation.</p>
Title	<p>The title that the menu option is given in the patient app, e.g., Seek care.</p>
Description	<p>A descriptive text in the patient app that gives the patient more information, e.g., “Open 24 hours a day, only for people aged 18 years or older”.</p>
Price label	<p>Price label is used if there should be a price displayed for the menu item. e.g., “100”.</p>
Icon	<p>The icon that will be used with the menu item.</p>
Properties	<p>If certain characteristics should be present for the menu item from the start, then it can be stated here. E.g., setting the menu item to always direct the patients who apply through the menu item to a certain resource, for example a Dentist.</p> <p>Otherwise, resources and other properties can be set dynamically and as a rule-based property based in the business rules.</p>

7.2.3. Alerts

The **Alerts** tab is for adding news items or alerts to the Patient app. Currently it is only possible to edit these if you are a superuser in the system. Contact the implementation manager at Platform24 for help with editing alerts.

Alerts

Title	Message	Link	Actions
Test1 no link	Here you can add your own alerts and information to the user	www.1177.se	✎ 🗑️


Add new alert

Title* :

Message:

Link:

Cancel
Save

To edit an existing alert, click the pen  icon in the **Actions** column.

To delete an existing alert, click the trash bin  icon in the **Actions** column.

To add a new alert, click the big green plus sign  in the bottom right of the screen.

Title The title for the alert. It will be displayed in bold in the Patient app.

Message The information that will be visible in the alert.

Link A link that will be visible under the text **Read more** where the patient can find more information.

7.2.4. Offline flow

If patients in the patient app are to be guided to book appointments at physical care units, these care units will need to be added to the offline flow so that they can be displayed in the patient app.

At the moment it is only possible to edit the offline flow if you are a super user in the system. Contact the implementation manager on Platform24 for help with editing these.

Offline flow

Choose from which care units to show timeslots for physical appointments

Enabled

- Admin24
- Apotek Birsta
- Apoteket Berguven
- Apoteket Bojorten

Disabled

-
- 1177 Region Västmanland
- 1177 Vårdguiden Sörmland
- 1177 Vårdguiden på telefon
- 1177 direkt Västernorrland
- 123
- 123
- ACQUA Klinik Leipzig

7.2.5. Customizations


There are customizations available for both the menu items **Origin** and **Care units**. The customizations available through the **Origin** menu item only affect the specific origin, while the customizations available through **Care units** affects the customizations for that care unit in Clinic.







Most customizations has an On/Off (true/false) functionality. It can for instance be used to set the toplist visible in the patient app, activate or disable the showing of the **My profile** tab, adjust the color schemes in the app, etc.

To edit the **Customizations**, click on the pen  icon.

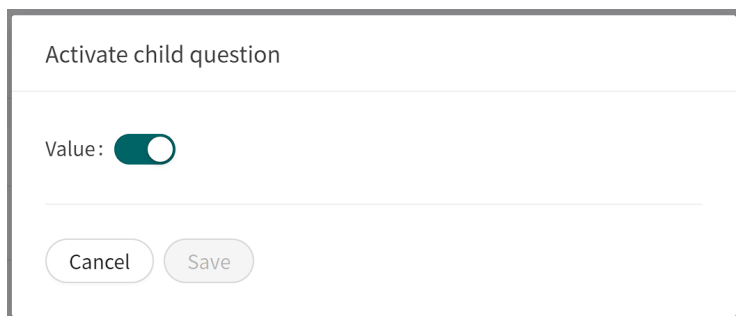
Customizations

Enable functionality



Setting	Value	Tags	Description	Actions
A Google Play link		patient-app	A link to the Google Play to install or open a native app	
Activate child question	<input checked="" type="checkbox"/> True	patient-app		
Activate on-boarding step for first login	<input checked="" type="checkbox"/> False	patient-app		
After login consents	"	patient-app	A list of consents to ask after you log in	
Allow drop-in when closed	<input checked="" type="checkbox"/> False	rule patient-app		
Allow drop-in when open	<input checked="" type="checkbox"/> True	rule patient-app		

Set new values for options in the **Value** column in the **Customization** page and click **Save** Save. The settings in the **Value** column will update to reflect your customized options. See example below:



7.2.6. Text content

This section enables the customization of texts in the Patient app, SMS, e-mail, and some parts of Clinic.

The default setting in the app allows the standard system texts to be used and displayed here. Moreover these texts can be adapted to the partner-specific texts.

Use the search box to search for either the text **ID** or an existing text.

Text & translations			
Tailor text and translations for all functions, messages and notifications related to the app		home_login	Search
Functionality	Updated	Swedish	Actions
home_login_button	✓	Logga in för pågående ärenden.	✎
home_login_closed_title		Vi har stängt	✎
home_login_sub_header_dkv		I och med att du inte lämnat samtycke kan du inte fortsätta din resa och måste återgå till DKV Hälsa.	✎
home_login_main_header		Välkommen!	✎
home_login_sub_header		Logga in med bankID	✎
home_login_closed_description		Våra öppettider är helgfri vardag mellan 9:00-14:30. Välkommen tillbaka imorgon!	✎

Functionality

The ID defined in the Patient app associated with the editable text

Updated

A checkmark shows that the text has been updated and is specific for the partner. If there is no checkmark in the column, the text is the same as the default setting from Platform24.

Language

The languages that are defined to be used as default for the Patient app are visible here. The languages can be changed via the **Customizations** menu item through the setting **Default language**.

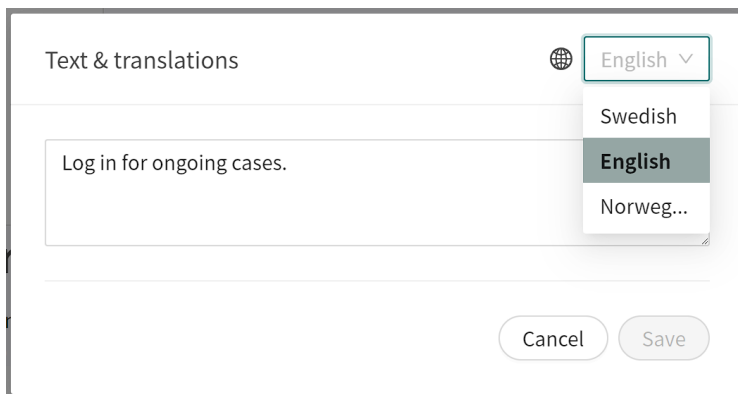
Deactivate app with message	False	patient-app	✎
Default language	sv	patient-app	✎
Default practitioner type nurse	False	rule	✎

Actions

Click on the pen  at the end of each line to edit the text.

Change the text in the text box and click **Save** when done. Do not forget to edit the text for all available languages defined for the Patient app by using the language selector in the top right corner.

The languages defined for the Patient app can be changed using the **Customizations** menu item in the setting **Available languages**.



Attestations assigned to creator	✖ False	healthmanager	Enable new attestations triggered by events to be assigned to the action creator.	↗
Available languages	'sv', 'en', 'no'	patient-app	Determines which languages the patient can choose between in the patient app	↗
Background color in the patient app	#f6f6f6	patient-app	Used for background waves, background for various elements like chat bubbles, exit action list, checkbox initial background, disclaimer. If not defined it's set to	↗

7.2.7. Toplist

The **Toplist** defines the list of common search terms that can be seen in the Patient app if the partner has chosen to have a flow where patients themselves can search for the correct triage questionnaire.




Toplist Enable Toplist:

Here you can configure (add, edit and delete) the search terms showed in the toplist in the patient app for a specific origin ID. Maximum 10 search terms can be set.

Order	Condition	Search term ID	Display label	Actions
0	medicalCertificate	medicalCertificate	Swedish: Sjukintyg English: Sick note Norwegian:	↗ 🗑
1	renewPrescriptions	renewPrescriptions	Swedish: Förynna recept English: Renew prescription Norwegian:	↗ 🗑
2	feverCondition	feverCondition	Swedish: Feber English: Fever Norwegian:	↗ 🗑
3	cough	cough	Swedish: Hosta English: Cough Norwegian:	↗ 🗑
4	depression	depression-depression-someParam	Swedish: Depression English: Depression Norwegian:	↗ 🗑
5	AllQuestionTypes	AllQuestionTypes-newtrriage	Swedish: Alla frågetyper English: All question types Norwegian:	↗ 🗑
			Swedish: Utsläp	

+

It is possible to edit the **Toplist** with the search terms that the partner wants, perhaps based on the season or focus of the organization.

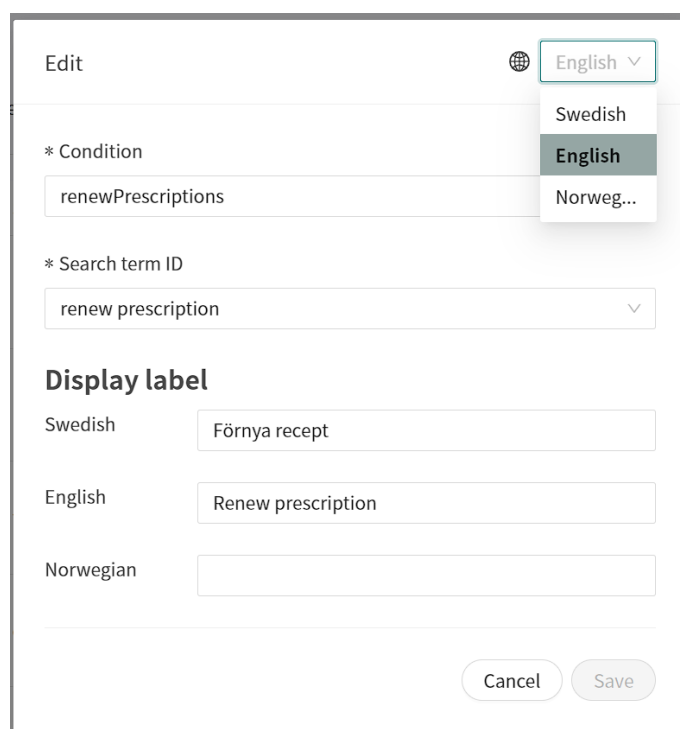
A set of default search terms are listed in the **Toplist**. These can be deleted by clicking on the trash can , edited by clicking on the pen  or changing the sort order by dragging a search term to a different place in the list. You can also add a new term to the **Toplist** using the green plus button  in the bottom right of the screen.

It is possible to have a maximum of 10 search terms in the **Toplist**. The preview of the Patient app on the right shows what the **Toplist** will look like in the app, and is updated when a change is made for the partner.

Order	The order that the search terms will be displayed in the Patient app.
Condition	The triage questionnaire the search term will lead the patient to.
Search term ID	The ID of the search term as defined by the Questionnaire in which the patient is entered. Only existing search terms in the questionnaires can be added to the Toplist.

Display label The text that will appear for the search term in the Patient app. It is possible to modify the text of the search term label compared to what is actually in the search term. For example, the search term **Pollen Allergy** may be in the form **Allergy**, but since it is summer right now, the partner may want **Seasonal Allergy** to appear in the search term in the Patient app instead.



Click on the pen icon  to edit the values for the **Toplist** search term.



The screenshot shows an 'Edit' form for a search term. At the top right, there is a language dropdown menu with 'English' selected. Below this, the form has the following fields:

- * Condition:** A text input field containing 'renewPrescriptions'.
- * Search term ID:** A dropdown menu with 'renew prescription' selected.
- Display label:** A section with three rows:
 - Swedish:** Input field containing 'Förnya recept'.
 - English:** Input field containing 'Renew prescription'.
 - Norwegian:** An empty input field.

At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

Actions Clicking on the pen  allows for editing the search term. Clicking the trash can  deletes the search term.

For the **Toplist** to be visible, the partner has to set **Enable toplist** to `true` in the **Customization** menu.

Enable toplist

True

patient-app

If the partner has the premium package of Triage24 and edits and manages the medical content themselves, the partner can add new questionnaires and search terms and then use these in the top list.

The partners who use the existing medical content from Platform24 can use the forms and search terms that are included there.

7.2.8. Rules

The business rules defined for the partner will be shown in this section.

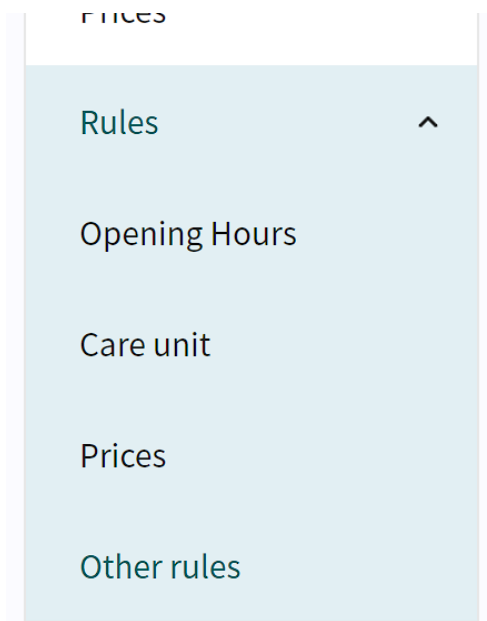



NOTE




It is currently not possible to edit the business rules. It is possible to read up on how partner-specific business rules are set up. They are grouped within the category they belong to


The rules are run when a triage interview with the patient is completed and it is the business rules that generate the recommendation page for the patient with text and different choices (buttons).

Expand the **Settings** menu item **Rules** by clicking on it to show the different rules that are set.



Opening Hours To see the content of a business rule for the **Opening Hours**, click the pen  icon in the **Actions** column to the right.

Rules	Condition	Outcome	Actions
Opening Hours Rule - Weekend	//weekend + timeHHMM + timeHHMM//	//open//	
Opening Hours Rule - Weekend	//weekend + timeHHMM + timeHHMM//	//open//	
Opening Hours Rule - Weekend	//weekend + timeHHMM + timeHHMM//	//open//	

Rule English 

ID	Category	Priority
mati_new_test_1	<input type="text" value=""/>	1850

Description

Opening Hours Rule - Weekend

Condition

Condition 1

Field	Operator	Value
<input type="text" value="weekend"/>	<input type="text" value="Equals"/>	<input type="text" value="true"/>

Condition 2

Field	Operator	Value
<input type="text" value="timeHHMM"/>	<input type="text" value="Greater Than 0..."/>	<input type="text" value="13:00"/>

Condition 3

Field	Operator	Value
<input type="text" value="timeHHMM"/>	<input type="text" value="Less Than Or E..."/>	<input type="text" value="15:00"/>

+Add more

Outcome


Outcome 1


Field	Operator	Value
<input type="text" value="open"/>	<input type="text" value="Set"/>	<input type="text" value="true"/>

+Add more

Click **Ok** in the bottom right of the screen to leave the rule.

Care unit

To see a business rule for the **Care unit**, click the pen  icon in the **Actions** column to the right.

Rules	Condition	Outcome	Actions
Care Unit Rule - m24 Psykolog	//resourceType//	//careUnitId//	

Rule careUnitRule English

English
Swedish
English
Norweg...

ID: m24_test5 Category: careUnitRule Priority: 6702

Description: Care Unit Rule - m24 Psykolog

Condition

Condition 1

Field	Operator	Value
resourceType	Equals	PSYCHOLOGIST

+Add more

Outcome

Outcome 1


Field	Operator	Value
careUnitId	Set	6F5AACBE-1A40-41




+Add more

Ok

Click **Ok** in the bottom right of the screen to leave the rule.

Prices

To see a business rule for the **Prices**, click the pen  icon in the **Actions** column to the right.

Rules	Condition	Outcome	Actions
Price Rule - m24		//price//	
Price Rule - m24	//conditionId + careUnitId//	//price//	
Price Rule - m24 Nurse	//conditionId//	//price//	

Rule priceRule English ▾

ID	Category	Priority
m24_test3	priceRule ▾	11720

Description

Price Rule - m24 Nurse

Condition

Condition 1 ✕

Field	Operator	Value
conditionId	Equals ▾	followup/visitNurse

+Add more

Outcome

Outcome 1 ✕


Field	Operator	Value
price	Set ▾	100

+Add more

Ok

Click **Ok** in the bottom right of the screen to leave the rule.

Other rules

To view a business rule for **Other rules**, click the pen  icon in the **Actions** column to the right.

Rules			
Rules	Condition	Outcome	Actions
Add selectChildTask if action is for a child	//child + workflow//	//tasks//	
Care Unit Rule		//careUnitId//	

Rule careUnitRule English ▾

ID	Category	Priority	English ▾
m24_test09	careUnitRule ▾	12000	Swedish
			English
			Norweg...

Description

Care Unit Rule

Condition

This rule applies to all conditions

+Add more

Outcome

Outcome 1 ✕

Field	Operator	Value
careUnitId	Set ▾	6F5AACBE-1A40-41

+Add more

Ok

Click **Ok** in the bottom right of the screen to leave the rule.

8. Configurations and settings for care units in Clinic



WARNING

All changes made using Manage can affect the patient flow and the recommendation to the patient.

There are high demands on persons who use Manage to configure settings. These users need basic training in the fundamentals of how the tool works and also need to read this manual for further understanding of functionality.

If the partner uses care units in Clinic to handle patients, settings for the care units used can be edited in Manage.

Click on **Care units** in the Manage main menu to the left to start editing the care units available to the partner.


Click on the arrow ▶ by the **Care Provider** to expand the list and see all the **Care units** under the **Care Provider**.

Care Providers

🏠 Care Providers



Id ↕	Name ↕	Actions
▼ 🏠 FC2766B1-F4CC-42BD-BAD3-473FE0BC427B	Triage team	⊕
🏠 F291400A4-58B3-4C0C-B0A1-2FC4EB98FD75	Triage team Care Unit	✎
🏠 55A643EB-ADB5-4B3B-A91B-94D7A3C6622C	Triage team Care Unit Actions1k	✎

The **Care Provider** data is not possible to edit at this time, so there is no pen icon available on that row. Click the pen  for a **Care unit** to access the available alternatives for that unit.

8.1. Basic details

The **Basic Details** setting is where the basic information for the **Care Unit** can be edited.




NOTE

After editing, don't forget to click the **Save**  button in the lower right corner!

Care Units: Triage team Care Unit Actions1

[Home](#) / [Care Providers](#) / FC2766B1-F4CC-42BD-BAD3-473FE0BC427B / [Care Units](#) / 55A643EB-ADB5-4B3B-A91B-94D7A3C6622C

 Settings

Basic Details

Customizations

Phrases

Basic Details

Name	* HSAID
<input type="text" value="Triage team Care Unit Actions1"/>	<input type="text" value="55A643EB-ADB5-4B3B-A91B-94D7A3C6622C"/>
Default origin	Region
<input type="text" value="triageteam"/>	<input type="text" value=""/>
Address	Location
<input type="text" value=""/>	<input type="text" value=""/>
Phone number	Latitude
<input type="text" value=""/>	<input type="text" value=""/>
Longitude	Booking system
<input type="text" value=""/>	<input type="text" value="Clinic 24"/>

- Name The name of the **Care unit**. It is the name visible to the practitioners in Clinic and to the patients in the Patient app.
- HSAID The HSA-id/external ID of the **Care unit**.
- Default origin The origin the **Care unit** primary will use to book meetings.
- Region The region the **Care unit** belongs to.
- Address, Location The address and location of the **Care unit**.
- Phone number The phone number the **Care unit** can ask patients to use to call the unit.
- Latitude, Longitude Coordinates used to enable displaying the **Care unit** on a map.
- Booking system The booking system used to set up times and book patients.

8.2. Customizations

Customizations are available in both the **Origins** menu and in the **Care unit** menu.

In the **Origins** menu, there are only the customizations available that affect the origin and in the **Care unit** menu there are Customizations that affect the **Care unit** in Clinic.


Most customizations has the functionality On/Off (true/false).


The customizations can be about setting so that phrases are activated to be sent out in the care unit, activating handover between care providers, showing the triage section, etc.

Click the pen  icon to edit a **Customization** setting.

Care Units: Triage team Care Unit Actions1


Care Providers / FC2766B1-F4CC-42BD-BAD3-473FE0BC427B / Care Units / 55A643EB-ADB5-4B3B-A91B-94D7A3C6622C





-  Settings
- Basic Details
- Customizations
- Phrases


 Saving updated customizations may take a couple of seconds.

Customizations

Enable functionality



Setting	Roles	Value	Tags	Description	Actions
Activate irregularity feature	All	✘ False	clinic-app		
Activate new questionnaire search for Clinic	All	✘ False	clinic-app	Enables new, Code24-based search of condition/questionnaires to be used in Clinic app chat and booking.	
Alfarecept integration	All	✘ False	clinic-app	Turns the Alfarecept integration on/off	
Allow the "Group calls" functionality in Clinic24	All	✘ False	clinic-app	Enables the "Group calls" section in Clinic24 with the corresponding functionality	

Set the intended value in the **Customization** and click on the Save  button. The value in the **Value** column should be updated to your new selection.

8.3. Phrases

The **Phrases** section contains standard phrases that the care unit can add and send out in meetings with the patient.

The phrases are administered via Manage but sent out in Clinic for the **Care unit** they are defined for. See the [Autophrases \[64\]](#) section of this document for more information on how and by whom these phrases can be administered.

9. Administering users in Platform24

As an administrator, you will add the users into the Platform24 environment through Manage. After the user has been added to the system, the relevant permissions (Practitioner and Administrative roles) can be assigned to the user.


The **Users** menu item is used to manage users with access to Clinic as well as Manage.

platform24
Manage


 Name **SUMMARY**

Partner:

triageteam

 Origin

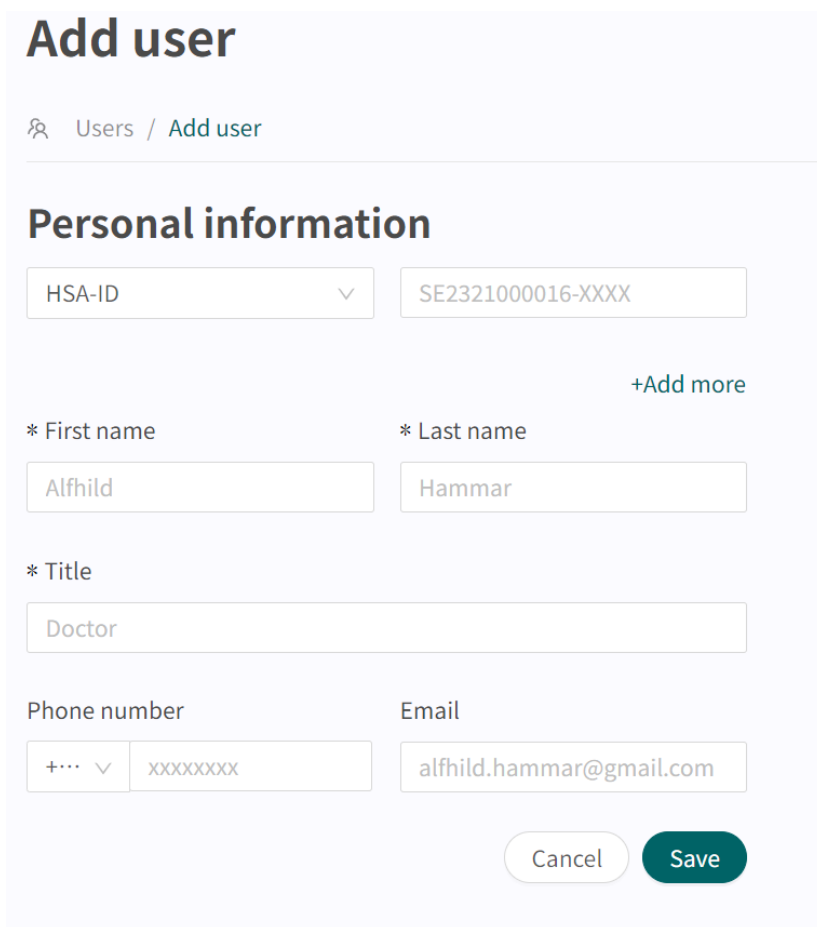
 Care units

 **Users**

9.1. Add a new user

1. Click on **Users** in the main menu to open the **Users** workspace.

- 2. Click on the plus sign in the lower right corner . You are now redirected to **Add user** view.



Add user

Users / Add user

Personal information

HSA-ID SE2321000016-XXXX

+Add more

* First name * Last name

Alfhild Hammar

* Title

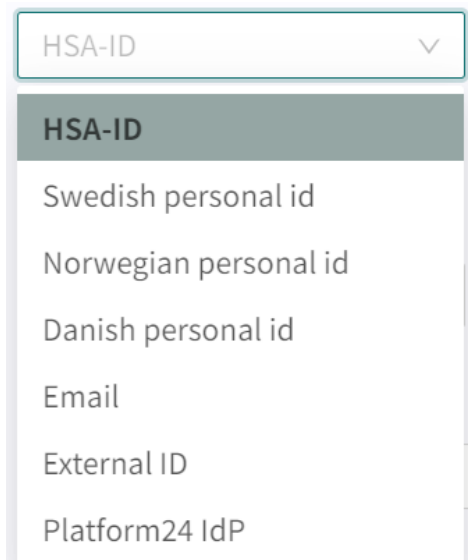
Doctor

Phone number Email

+... xxxxxxxx alfhild.hammar@gmail.com

Cancel Save

- 3. Choose the type of ID to be used for login and fill in the login details.



HSA-ID

HSA-ID

Swedish personal id

Norwegian personal id

Danish personal id

Email

External ID

Platform24 IdP

The type of ID depends on what authentication method is used by your organization/unit or country:

- **HSA-ID**

Enter the complete HSA-ID number in the format *SE2321000016-XXXX*. It is not enough to fill in the last numbers, the entire HSA-ID number, including the hyphen, must be filled in. This also includes the country code at the start.

HSA-ID	SE2321000016-XXXX
--------	-------------------

- **Swedish personal id**

Enter the full Swedish personal number in the format *YYYYMMDDXXXX*, without a hyphen and using the full four numbers for the year.

Swedish personal id	YYYYMMDDXXXX
---------------------	--------------

- **Norwegian personal id**

Enter the full Norwegian personal number in the format *DDMMYYXXXXX*.

Norwegian personal id	DDMMYYXXXXX
-----------------------	-------------

- **Danish personal id**

Enter the full Danish personal number in the format *DDMMYY-XXXX*.

Danish personal id	DDMMYY-XXXX
--------------------	-------------

- **Email**

Enter the email address in the format *example@domain.com*.

Email	example@domain.com
-------	--------------------

- **External ID**

Enter the external ID (BSN).

External ID	
-------------	--

- **Platform24 IdP**

Enter the Platform24 Identity Provider (IdP) in the format *example@domain.com*.

Platform24 IdP	example@domain.com
----------------	--------------------

For questions about your type of ID and login, contact the superuser at your clinic.

4. Fill in the personal information
 - a. **First name** - Visible to the patients if the user is a Clinic user. It will also be used as an identifier for configuration changes in Manage.
 - b. **Last name** - Visible to the patients if the user is a Clinic user. It will also be used as an identifier for configuration changes in Manage.
 - c. **Title** - Visible to the patients in chat if the user is a Clinic user.
 - d. **Phone nr** - Used for notifications in Clinic for new messages or about new patients in the queue.

**IMPORTANT**

The number need to be entered with the country code, for example +46 for Sweden or +47 for Norway. Special characters and a leading zero in the phone number will be automatically removed to adapt the phone number to standard.

- e. **Email** - Can be left empty for Clinic users. For Manage admin users, it should be filled in as it is a useful contact point to the user.

**NOTE**

First name, Last name and Title are mandatory information.

This is how each practitioner/user is presented to the patients they receive in chat.

5. Finish by clicking the **Save**  button in the lower right corner.

10. Administering roles and authorizations for Manage

In order for a user to have access to log in to Manage, the user needs to have such a role allowing them to do that for the partner. This means that if the user does not have a role configured for the partner, the user cannot log in to Manage.

It is possible to have different roles for different partners if the user is to have access to several partners' settings.

To give a user access to partner settings:

1. In the main menu, select **Origin**.
2. Select the top level **Origins** folder and click the pen icon to display the Basic Details.

Log History Changes

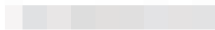


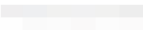














Origins

Origins Search

ID	Name towards patient	Actions
▶ platform24	Platform24	

3. Scroll to the bottom of the page to the **Add roles to origin** section.
4. In the **Add roles to origin** section, edit an existing user by clicking the pen icon for the user, or add a new user role by clicking the **Add role** button.

Add roles to origin Add role

User	Role	Actions
	ADMIN	 
	ADMIN	 
	ADMIN	 
	ADMIN	 
	READ	 
	WRITE	 

5. Select the user role in the **Role** field in the **Edit/Add role** window that opens.

Available roles in Manage:

- Admin** The admin user can access and edit all configurations for the partner.
The admin user can edit other users at the partner, including being able to add the admin role to other users.
- Write** The write user has access to and is able to edit all configurations of the partner.
- Read** The read user can view all configurations for the partner, but can't edit them.

11. Administering roles and authorizations for Clinic

11.1. Preparations

11.1.1. Appoint an administrator for the care unit

Each care unit need to appoint one or more administrators.

The administrator performs the following tasks for the care unit:

- adding authorizations for the practitioners that are going to work in Clinic
- removing authorizations for the practitioners that no longer works in Clinic
- adding and editing the autophrases you wish to use or change in the chat



NOTE

It is recommended that the administrator does not provide more permissions than the user needs to be able to work in the platform. If you are unsure of which permissions to use for a specific user, ask your customer contact (implementation manager) on Platform24.

11.1.2. Inform Platform24 about the appointed administrator

Inform your customer contact (implementation manager) at Platform24 in good time on who has been appointed administrator for the care unit.

Required information about the administrator user when informing Platform24:

- Name
- Email
- HSA-ID in its entirety (format: SE2321000016-NNNN)
Alternatively Swedish personal ID in the care unit uses login with mobile BankID
- Care unit or care units the user is going to administrate

11.1.3. Before training and go-live

Prior to training sessions for users at a care unit, the administrator of the care unit need to add the required authorizations to the users in the Manage demo environment.

This needs to be done so that everyone can log in to the demo environment and complete the exercises during the training day.

If the production environment is complete, new users and their authorizations can be added to the demo and production environments simultaneously to save time. The most important part is that the users have their authorizations in the production environment at the latest the same day as go-live.

Contact your customer contact (implementation manager) at Platform24 if you are unsure about the production environment being ready to add user authorizations and autophrases to it.

11.1.4. Booking tickets for other care units

If the care unit has the function for ticket bookings enabled, it is possible to send booking tickets to other care units.

There is no need for a special authorization to send booking tickets within the same care unit as the ticket is issued from.

11.1.5. Authorizations for booking to another care unit

If your unit is to be able to book patients to a unit other than the one administered by you, this needs to be done by the administrator of that unit in Manage.

Notify the implementation manager at Platform24 about the users who need that authorization before the user training.

The following information is required:

- name
- title
- HSA-ID or Swedish personal ID

If new employees need the authorization to book to another care unit after the user training, you should contact Support. For contact details to Support, see [Contact details \[6\]](#).



NOTE

If an employee with the above authorization to book to other units leaves, you must notify Support.

11.2. Adding authorizations

Authorizations are settings on a user that give that user access to certain functionality.

Authorizations can be added and modified for existing users. If you wish to add a new user with the accompanying authorizations, you need to add a new user first. This is described in [Add a new user \[41\]](#).

There are two types of user roles that convey different authorizations to users.

Practitioner roles	Enable a user to receive and communicate with patients. A user can only have one practitioner role per care unit.
Administrative roles	Enable administrative functions. A user can have several administrative functions per care unit.



WARNING

Assign as few roles as possible to each user.

Different roles can access different types and amounts of patient information, meaning that with each added role the amount of patient information the user can access increases. To protect patient integrity, each user should only have access to the information absolutely necessary to perform their work.

11.2.1. Practitioner roles

Practitioner roles authorize users to receive and communicate with patients in the healthcare platform. A user can only have one practitioner role per care unit.

Practitioner roles are defined by choosing a **Care unit**, a **Role** and a **Primary role**.

Care unit The care unit the user is authorized to work in. A user can only have **one** role per care unit.

You can only select among the care units that you have access to as an administrator. If the user has roles in care units for which you are not an administrator, you will be able to see them, but not edit them.

Role For each user, select the role that corresponds to the role that they will have towards the patients in the care unit. The appropriate role is based on the patient flow configurations within your healthcare platform and care unit. It can correspond to the users professional tittle (nurse, physician etc) but may not. In case of doubt, contact the implementation manager on Platform24.



WARNING

It is important that users are assigned the correct Role. Users with the wrong Role can cause unwarranted patient risks.

Primary role If the user will work in more than one care unit, the unit in which the employee usually works should be selected as the **Primary role**.

A user may need authorizations for several care units, and may have a different role in different care units. You will need to [add Practitioner roles \[49\]](#) for all the different care units the user require authorization for.

11.2.2. Add a practitioner role

1. Go to the **Users** menu item in the main menu.
2. Search for the user in the search field and click on the user's name in the list.

Users

🔍 Users

🔍

Name ⬆	Id ⬆	Actions
Name 	Doctor	✎

<
1
>

This will open the **Update user** view.

Update user

Users / Update user

Personal information

HSA-ID

First name Last name

Title

Phone number Email

Users

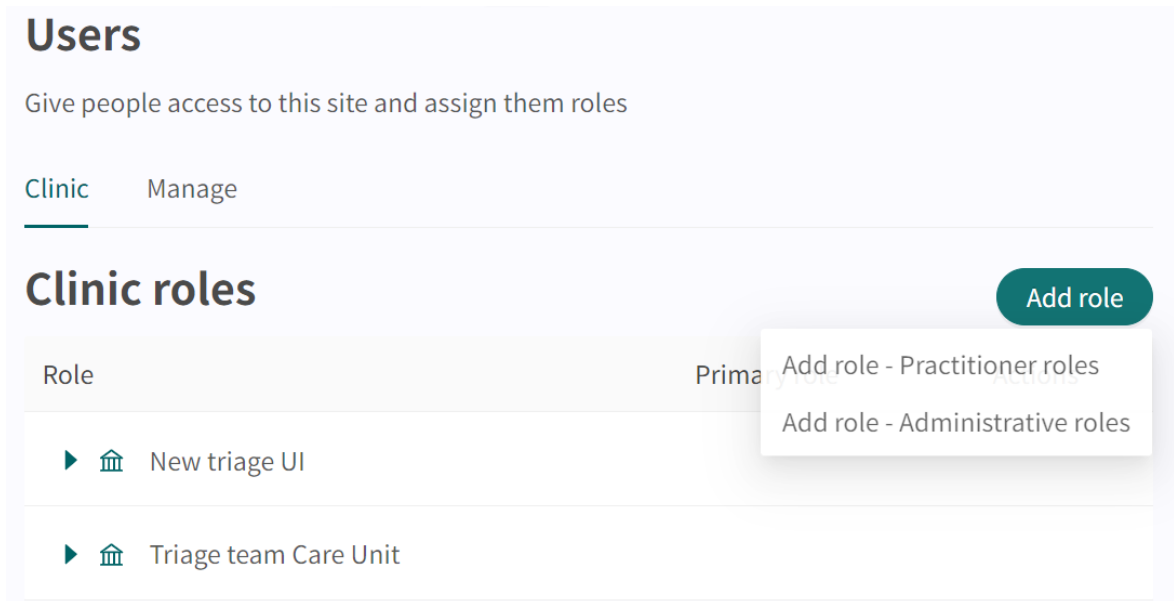
Give people access to this site and assign them roles

Clinic [Manage](#)

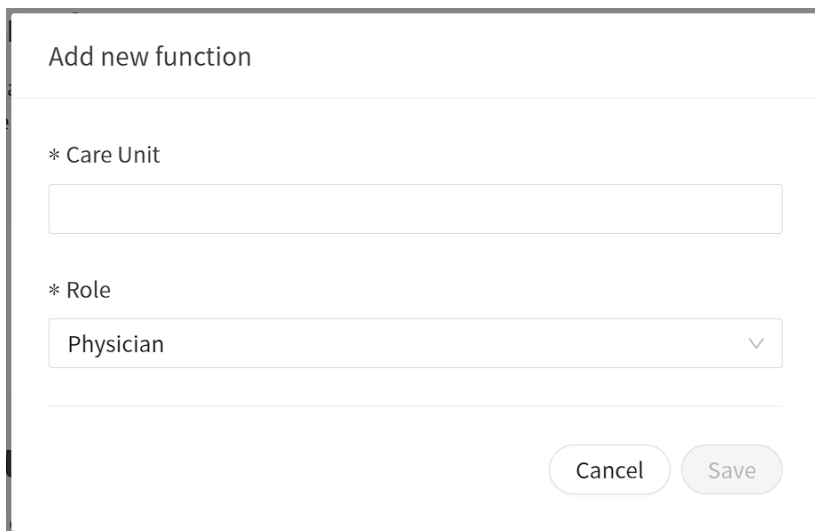
Clinic roles

Role	Primary role	Actions
<input type="checkbox"/> <input type="button" value="New triage UI"/>		
<input type="checkbox"/> <input type="button" value="Triage team Care Unit"/>		

- 3. Make sure that the **Clinic** tab is selected. Click the **Add role** button and select the **Practitioner roles** option.



This opens the **Add new function** dialog.



4. Select care unit:

- a. Click the **Care Unit** field.
- b. Select a **Care Unit** from the drop-down list.

You can either scroll through the list or search for a care unit by typing in parts of the care unit name.

The screenshot shows a form titled "Add new function". Under the heading "* Care unit", there is a search input field containing the text "tr". Below the input field, a dropdown menu is open, displaying three options: "New triage UI", "Triage team Care Unit", and "Physician". At the bottom right of the form, there are two buttons: "Cancel" and "Save".



NOTE

If the user is to have the same role in more than one care unit, multiple care units can be selected at the same time.

The screenshot shows the same "Add new function" form. In the "* Care unit" field, two items are selected and displayed as tags: "New triage UI" and "Triage team Care Unit", each with a small "x" icon to its right. Below this, the "* Role" field is a dropdown menu with "Physician" selected. At the bottom right, the "Cancel" button is light grey and the "Save" button is dark teal.

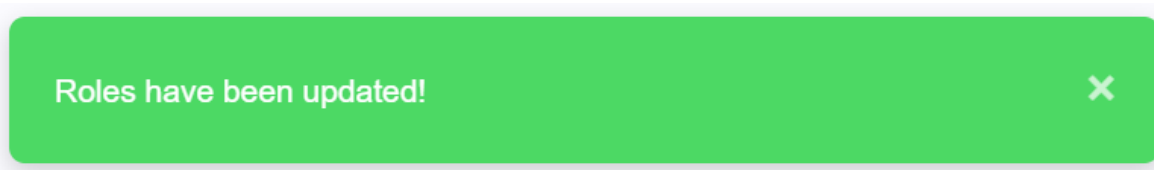
- 5. Select a **Role** from the drop-down list.

The screenshot shows a web form titled "Add new function". It contains two required fields, both marked with an asterisk (*):

- * Care unit:** A text input field containing the value "New triage UI" with a close button (x) on the right.
- * Role:** A dropdown menu currently displaying "Physician". The dropdown is open, showing a list of roles: Occupational therapist, Ophthalmologist, Optician, Ortopedic surgeon, Pediatrician, Personal trainer, Pharmacist, and Physician. The "Physician" option at the bottom of the list is highlighted in a dark grey color.

6. Click **Save**.

The update will be saved automatically and you will get a pop-up dialog confirming that roles have been updated.



If returning to the **Update user** view (by repeating steps 1 and 2), the added administrative roles will appear below the care unit in the **Clinic roles** list.

Users

Give people access to this site and assign them roles

Clinic [Manage](#)

Clinic roles

[Add role](#)

Role	Primary role	Actions
<ul style="list-style-type: none"> ▼ New triage UI ▼ Practitioner roles Physician <input type="checkbox"/> ▶ Administrative roles 		

11.2.3. Administrative roles

Administrative roles authorize users to utilize administrative functions. A user can have access to several administrative functions per care unit.



WARNING

Assign as few roles as possible to each user.

Different roles can access different types and amounts of patient information, meaning that with each added role the amount of patient information the user can access increases. To protect patient integrity, each user should only have access to the information absolutely necessary to perform their work.

Some care units do not need to set up any other authorizations or roles than the **Practitioner roles** (i.e., do not need to enter any authorizations for **Administrative roles**). It depends on which authorizations the user needs.

If the user is to be able to post appointments in Clinic or be authorized to book appointments in Clinic for the care unit in question, you need to add **Administrative roles** on that user.

The following **Administrative roles** can be added:

Administrator	The Administrator role can administer auto-phrases for the care unit. Contact your customer representative at Platform24 if the care unit needs to register more administrators.
Assess irregularities	The Assess irregularities role gives access to the Irregularity section of Clinic, where reported irregularities can be found and assessed.
Cash registration	<p>The Cash registration role provides access to all visits within a Care provider.</p> <p>This function has been requested by partners who want a central function for cash registration, so not all individual Care units have to handle the cash registration individually.</p> <p>If your Care unit is only to see visits within the care unit itself, the Cash registration role should not be assigned. The Cash registration role is used for those who have to cash register online visits to Clinic, often secretaries.</p> <p>Note that many units do not cash register visits in Clinic, in which case the cash registration role should never be used.</p> <p>The units that cash register online visits in Clinic have received specific training in that function, so you should not assign someone that role if they have not been trained.</p>
Create timeslots	The Create timeslots role is set on users that need to be able to create new bookable timeslots at the care unit specified in the Care unit field.
Schedule to	The Schedule to role makes it possible for the user to book appointments to the care unit specified in the Care unit field.

11.2.4. Add an administrative role

1. Go to the **Users** menu item in the main menu.
2. Search for the user in the search field and click on the user's name in the list.

Users

🔍 Users 🔍

Name ▾	Id ▾	Actions
Name [blurred]	Doctor	

< 1 >

This will open the **Update user** view.

Update user

Users / Update user

Personal information

HSA-ID

First name Last name

Title

Phone number Email

Users

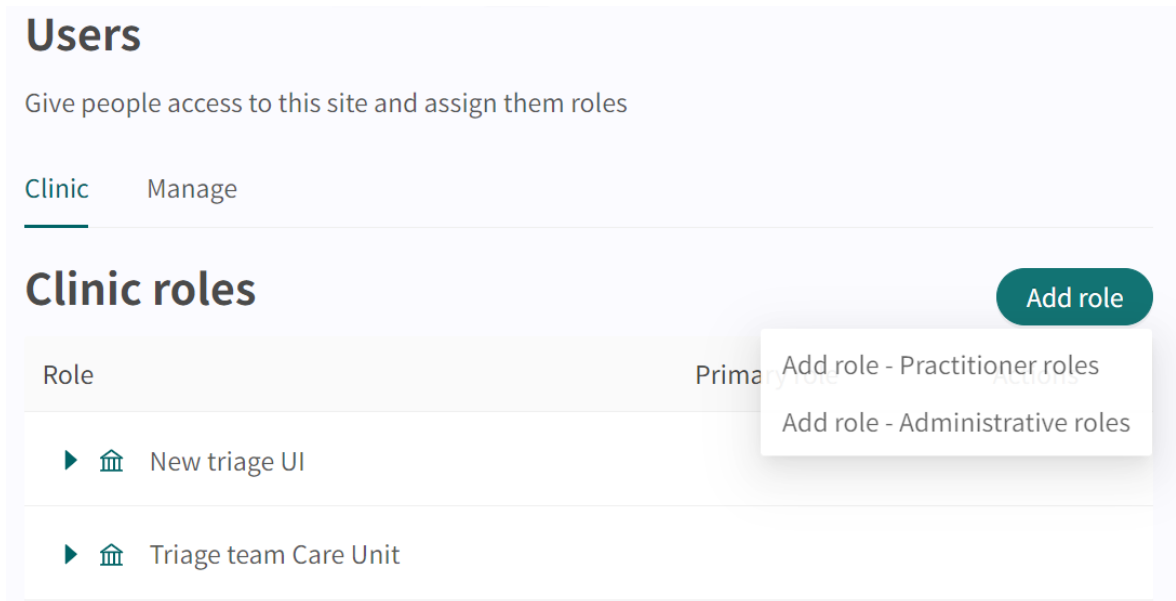
Give people access to this site and assign them roles

Clinic [Manage](#)

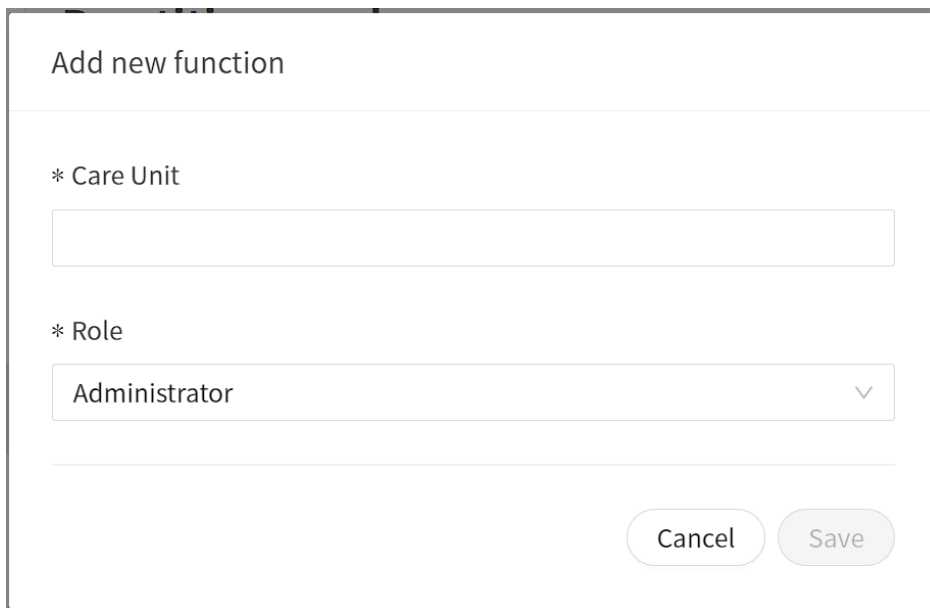
Clinic roles

Role	Primary role	Actions
<input type="checkbox"/> <input type="checkbox"/> New triage UI		
<input type="checkbox"/> <input type="checkbox"/> Triage team Care Unit		

- 3. Make sure that the **Clinic** tab is selected. Click the **Add role** button and select the **Administrative roles** option.



This opens the **Add new function** dialog.



- 4. Select care unit:
 - a. Click the **Care Unit** field.
 - b. Select a **Care Unit** from the drop-down list.
You can either scroll through the list or search for a care unit by typing in parts of the care unit name.

The screenshot shows a form titled "Add new function". Under the heading "* Care unit", there is a search input field containing the text "tr". Below the input field, a dropdown menu is open, displaying three options: "New triage UI", "Triage team Care Unit", and "Physician". At the bottom right of the form, there are two buttons: "Cancel" and "Save".



NOTE

If the user is to have the same role in more than one care unit, multiple care units can be selected at the same time.

The screenshot shows the same "Add new function" form. In the "* Care unit" field, two items are selected and displayed as tags: "New triage UI" and "Triage team Care Unit", each with a small "x" icon to its right. Below this, the "* Role" field is a dropdown menu with "Administrator" selected. At the bottom right, the "Cancel" button is light grey and the "Save" button is dark teal.

- 5. Select a **Role** from the drop-down list.

The screenshot shows a web form titled "Add new function". It contains two required fields, both marked with an asterisk (*). The first field is "Care unit", which contains the text "New triage UI" and a small "x" icon to its right. The second field is "Role", which is a dropdown menu. The dropdown is currently open, showing a list of roles. The first item, "Administrator", is highlighted in a dark grey bar. Below it are the following roles: "Assess irregularities", "Care planner", "Cash registration", "Create timeslots", and "Schedule to".

6. Click **Save**.

The update will be saved automatically and you will get a pop-up dialog confirming that roles have been updated.



If returning to the **Update user** view (by repeating steps 1 and 2), the added administrative roles will appear below the care unit in the **Clinic roles** list.



Users

Give people access to this site and assign them roles

[Clinic](#) [Manage](#)

Clinic roles

[Add role](#)

Role	Primary role	Actions
▼  New triage UI		
▶ Practitioner roles		
▼ Administrative roles		
Administrator	<input type="checkbox"/>	

11.2.5. Updating a role to be primary for a user

1. Go to the **Users** menu item in the main menu.

- 2. Search for the user in the search field and click on the user's name in the list.

Users

Users 🔍

Name	Id	Actions
Name [blurred]	Doctor	

< 1 >

This will open the **Update user** view.

Update user

Users / Update user

Personal information

HSA-ID

+Add more

First name Last name

Title

Phone number Email

Users

Give people access to this site and assign them roles

[Clinic](#) [Manage](#)

Clinic roles

Role	Primary role	Actions
New triage UI		
Triage team Care Unit		

- Make sure that the **Clinic** tab is selected and expand the care unit of interest as well as the role type that should be primary (**Practitioner roles** or **Administrative roles**).

Users
Give people access to this site and assign them roles

Clinic Manage

Clinic roles Add role

Role	Primary role	Actions
▼ New triage UI		
▼ Practitioner roles		
Physician	<input type="checkbox"/>	
▶ Administrative roles		

- Check the checkbox in the **Primary role** column.

Users
Give people access to this site and assign them roles

Clinic Manage

Clinic roles Add role

Role	Primary role	Actions
▼ New triage UI		
▼ Practitioner roles		
Physician	<input checked="" type="checkbox"/>	
▶ Administrative roles		

The update will be saved automatically and you will get a pop-up dialog confirming that roles have been updated.

Roles have been updated! ×

11.2.6. Remove roles for a user

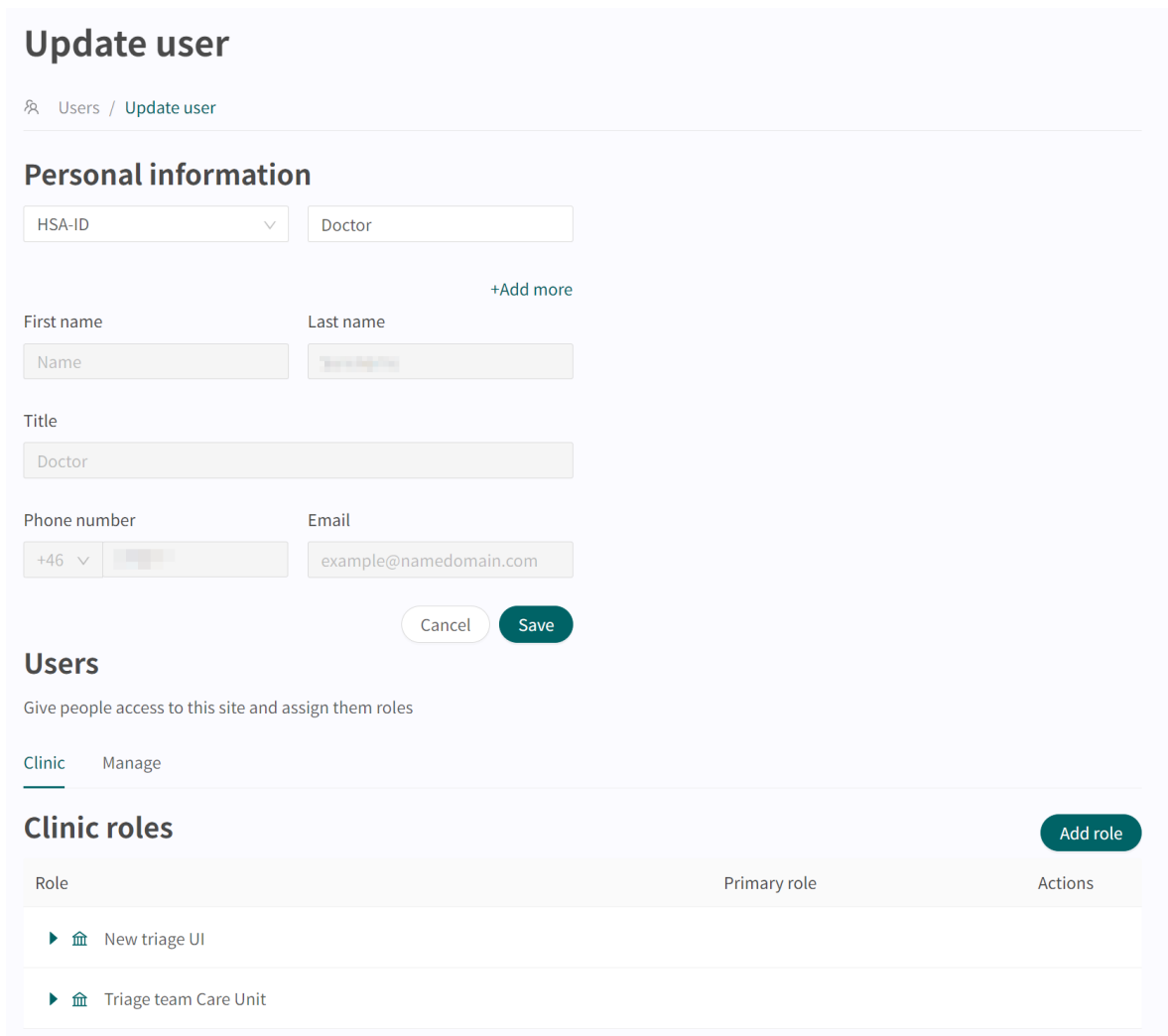
If a user quits a workplace, all roles from that user must be removed. This means that the user can no longer log in, but the personal information is saved. This saved data is used to, among other things, track visit history and logs.


To remove roles for a user:

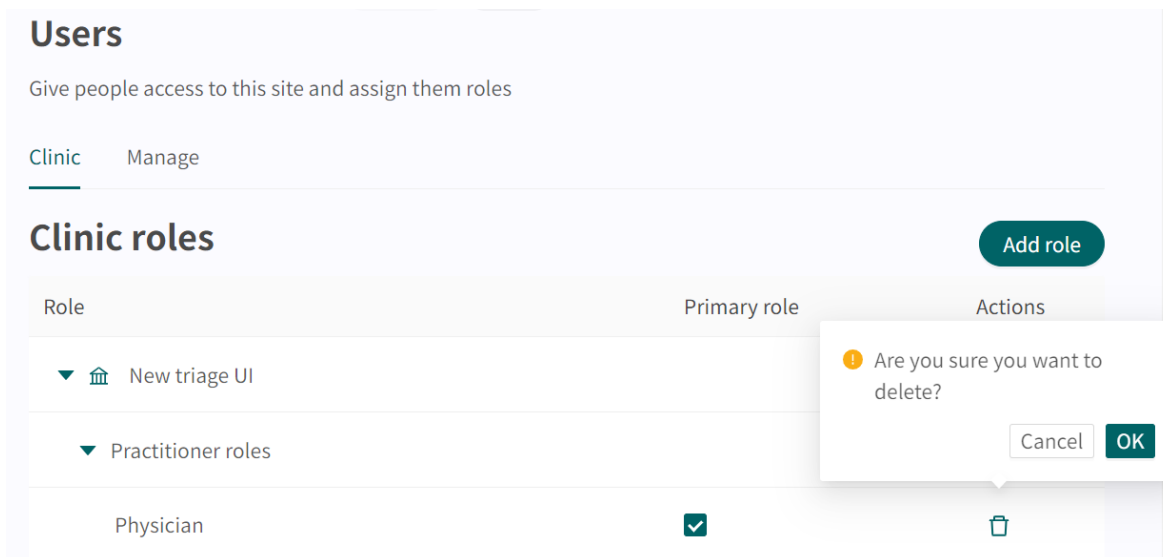
- 1. Go to the **Users** menu item in the main menu.
- 2. Search for the user in the search field and click on the user's name in the list.





This will open the **Update user** view.



- Make sure that the **Clinic** tab is selected. Remove the desired roles by clicking the rubbish bin  in the **Actions** column for the respective roles.



The screenshot shows the 'Users' management page with the 'Clinic' tab selected. Under 'Clinic roles', there is a table with columns: Role, Primary role, and Actions. The 'Physician' role is marked as a primary role (checked) and has a trash icon in the Actions column. A confirmation dialog is open over the trash icon, asking 'Are you sure you want to delete?' with 'Cancel' and 'OK' buttons.

Role	Primary role	Actions
▼  New triage UI		
▼ Practitioner roles		
Physician	<input checked="" type="checkbox"/>	

- Confirm the deletion by clicking **OK**. The update will be saved automatically and you will get a pop-up dialog confirming that roles have been updated.



11.3. Autophrases

Autophrases (phrases) are pre-formulated messages that can be sent to patients in the Clinic chat. It saves time and energy for the care provider as you do not have to rewrite all the texts, and reduces the risk of forgetting to write important standard information to patients.



NOTE

The user needs to be an **Administrator** at the **Care Unit** to be able to handle the care unit's autophrases.

Some examples of possible autophrases:

- Will be sending an electronic prescription soon**

I will shortly issue a prescription for you, when it is ready you will receive an SMS.
The prescription is sent electronically and can be picked up at any pharmacy.

- **Blood pressure questions**

Some blood pressure questions:

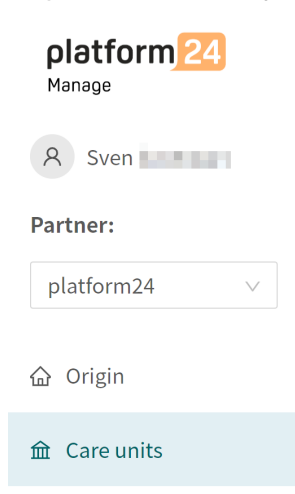
1. When did you last check your blood pressure?
2. Did you take your blood pressure yourself or was it healthcare staff who did it?
3. What was your blood pressure the last time you checked it?

It is possible to modify a care units autophrases by:

- Adding new phrases
- Editing existing phrases (removing or editing)

11.3.1. Adding new autophrases







1. Make sure you have chosen the correct **Partner** by checking the name of the **Partner** in the dropdown list below your username in the top left corner.




2. Click on the **Care units** menu item in the main menu.
3. Click on the green arrow ▶ to the left of the care unit you wish to edit. It is the small green arrow to the left of the HSAID. This will expand the list of care units in the list. It will show one or more care units in your list. How much it is expanded depends on your authorizations and how many care units that are under the care provider.

Care Providers

Care Providers

Id	Name	Actions
▼  FC2766B1-F4CC-42BD-BAD3-473FE0BC427B	Triage team	
 F291400A4-58B3-4C0C-B0A1-2FC4EB98FD75	Triage team Care Unit	
 55A643EB-ADB5-4B3B-A91B-94D7A3C6622C	Triage team Care Unit Actions1k	

4. Click the pen  icon in the **Actions** column on the row belonging to the care unit in question. This will open up the **Settings** menu for the care unit displaying the **Basic Details**.

Care Units: Triage team Care Unit Actions1


[Care Providers](#) / [FC2766B1-F4CC-42BD-BAD3-473FE0BC427B](#) / [Care Units](#) / [55A643EB-ADB5-4B3B-A91B-94D7A3C6622C](#)

- Settings
- Basic Details**
- Customizations
- Phrases

Basic Details

Name	* HSAID
<input type="text" value="Triage team Care Unit Actions1"/>	<input type="text" value="55A643EB-ADB5-4B3B-A91B-94D7A3C6622C"/>
Default origin	Region
<input type="text" value="triageteam"/>	<input type="text" value=""/>
Address	Location
<input type="text" value=""/>	<input type="text" value=""/>
Phone number	Latitude
<input type="text" value=""/>	<input type="text" value=""/>
Longitude	Booking system
<input type="text" value=""/>	<input type="text" value="Clinic 24"/>

Save

5. Click on the **Phrases** menu item to open the view.
6. Click the big green plus  sign in the bottom right corner to add a new phrase.

7. Add your phrase in the **Add new phrase** window.
The **Header** and **Phrase** fields are mandatory while **Category** is optional. If the **Care unit** has many phrases, specifying a **Category** makes it easier for the user.

Add new phrase

Header:

Category:

Phrase

Text **B** *I*

Title 1

Text to be used in the new phrase.

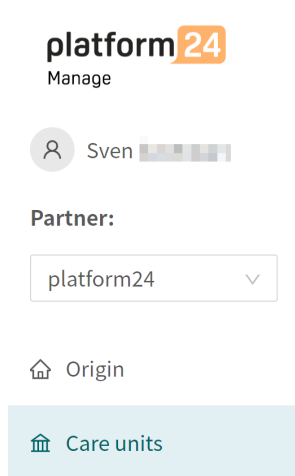
You can format the text in the text field. For instance:

- Add different titles (H1 - H6) or plain text (Text).
- Adding unordered and ordered lists
- Make a text **bold**
- Make a text *italic*
- Adding [links](#)

8. Click on the **Save** button to save your phrase.
The phrase will be shown in the **Phrases** list.

11.3.2. Editing and deleting autophrases

1. Make sure you have chosen the correct **Partner** by checking the name of the **Partner** in the dropdown list below your username in the top left corner.




2. Click on the **Care units** menu item in the main menu.
3. Click on the green arrow ▶ to the left of the care unit you wish to edit. It is the small green arrow to the left of the HSAID. This will expand the list of care units in the list. It will show one or more care units in your list. How much it is expanded depends on your authorizations and how many care units that are under the care provider.

Care Providers


🏠 Care Providers 🔍

Id ↕	Name ↕	Actions
▼ 🏠 FC2766B1-F4CC-42BD-BAD3-473FE0BC427B	Triage team	⊕
🏠 F291400A4-58B3-4C0C-B0A1-2FC4EB98FD75	Triage team Care Unit	✎
🏠 55A643EB-ADB5-4B3B-A91B-94D7A3C6622C	Triage team Care Unit Actions1k	✎

- Click the pen  icon in the **Actions** column on the row belonging to the care unit in question. This will open up the **Settings** menu for the care unit displaying the **Basic Details**.

Care Units: Triage team Care Unit Actions1

Care Providers / FC2766B1-F4CC-42BD-BAD3-473FE0BC427B / Care Units / 55A643EB-ADB5-4B3B-A91B-94D7A3C6622C

-  Settings
- Basic Details
- Customizations
- Phrases

Basic Details

Name * HSAID

Default origin Region

v

Address Location

Phone number Latitude

Longitude Booking system


v

Save

- Click on the **Phrases** menu item to open the view.



Care Units: Triage team Care Unit Actions1

Care Providers / FC2766B1-F4CC-42BD-BAD3-473FE0BC427B / Care Units / 55A643EB-ADB5-4B3B-A91B-94D7A3C6622C

-  Settings
- Basic Details
- Customizations
- Phrases


Phrases

Phrases for chat appointment

Header	Category	Phrase	Actions
Will be sending an electronic prescription soon	Prescriptions	I will shortly issue a prescription to you. When it is ready you will receive an SMS. The prescription is sent electronically and can be picked up at any pharmacy.	 

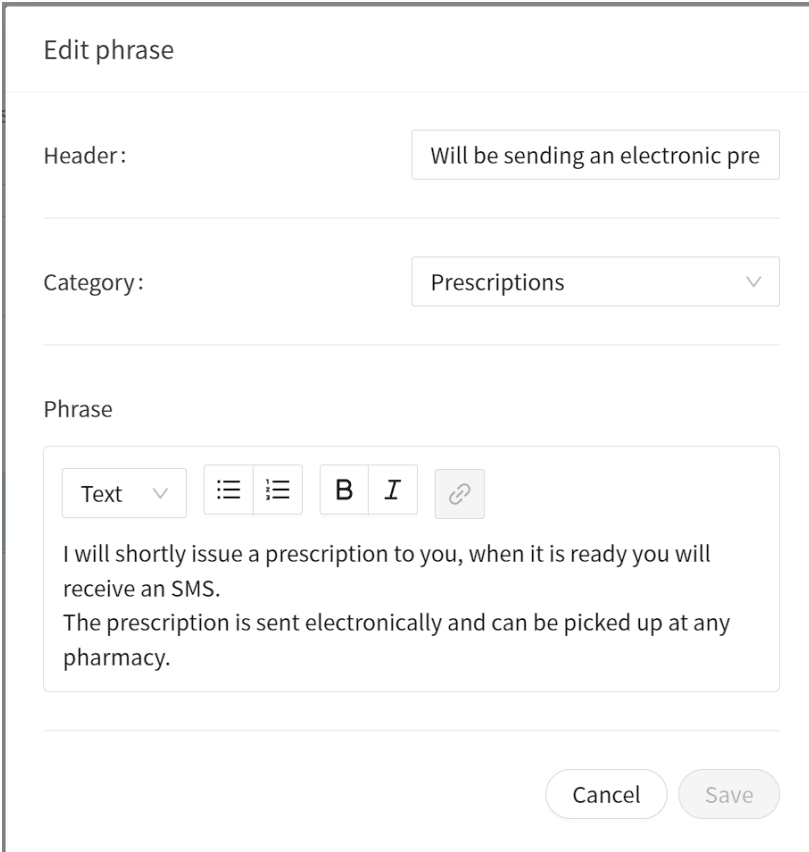
+

6. Editing a phrase

To edit an existing **Phrase** click on the pen  icon in the **Actions** column at the end of the row. This opens the **Edit phrase** window.

- a. Make the needed changes to the phrase.


The **Header** and **Phrase** fields are mandatory while **Category** is optional. If the **Care unit** has many phrases, specifying a **Category** makes it easier for the user.



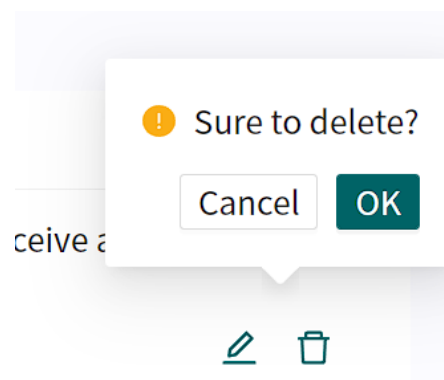
- b. Click on the **Save**  button to save your phrase.

The changed phrase will be updated in the **Phrases** list.

Deleting a phrase

To delete a phrase, click the trash bin  icon in the the **Actions** column at the end of the row.

Click OK in the pop up window to verify the deletion of the phrase.



This will result in the phrase being removed from the **Phrases** list.

12. Versions

#	Date	Description
1.0	2021-03-01	Extended the quick reference guide into a user guide.
2.0	2021-09-10	Format updated. Front page, color schemes, formatting of warnings. The user guide replaced with a user manual.
3.0	2022-05-30	Transfer into Paligo and making English the source language. Some content changes in the following areas: <ul style="list-style-type: none"> • minor grammar and spelling fixes • fixes to solve re-use issues in Paligo • clarifications of the login process • renamed topic/chapter Basic information/Working in Manage24 to "Manage24 uses" due to duplicate chapter names.
4.0	2022-10-31	CE-marking changes after Triage24 certification. .se changed to .com in contact information. Updated image in the Adding a new practitioner section. Corrected typos.
5.0	2023-03-02	Changed manual name from Manage24 User Manual to Manage User Manual. New images of the user interface with Platform24 logotype. Duplicate image removed in Section 5.3. Login to Manage24. Non-applicable sentence removed in active mode Warning.
6.0	2023-10-27	Main updates are: <ul style="list-style-type: none"> • Manage24 changed to Manage, Clinic24 to Clinic and Content24 to Content Studio. • Non-applicable symbols removed from page 2 and Chapter 2. • In chapter 3 and section 11.2.1: Caution regarding not to assign more roles than necessary per user removed as the information already is in a warning. • In chapter 3: reference to PDL (Swedish Patient Data Act) removed from a warning. • Referring to superuser instead of Customer Success Manager in section 5.3 <i>Log in to Manage</i>. • Information in sections 6.1 and 6.2 updated. • In section 11.2.3: description of the Assess irregularities role added, and roles Super Admin and System Admin removed. • Note removed from section 11.2.6. • Changed name of chapter 13 to References.

#	Date	Description
7.0	2024-04-03	<p>Main updates are:</p> <ul style="list-style-type: none">• General: Practitioners heading in the main menu updated to Users in text and images.• General: Images improved (main menu cropped so that the other content is more visible).• Information in previous abstract moved to Chapter 1. Note added in this chapter about UI components and user manuals.• Support email address updated for user manuals in Chapter 2.• Previous Chapter 5 <i>What is Manage</i> moved in as a section in Chapter 6 <i>About Manage</i>.• Chapter 6 renamed. Information from Chapter 6 moved in to new section 6.1 <i>Main menu</i> to be more visible. Information also added about menu items that previously were not described.• Chapter 9 improved and expanded to include more options in the Type of ID selection.• Updates to section 9.1 <i>Add a new user</i>: It is now possible to change a user's personal information in Manage after a user has been added. Therefore, the Important-note that this is not possible has been removed.• Sections 11.2.2 <i>Add a practitioner role</i>, 11.2.4, <i>Add an administrative role</i>, 11.2.5 <i>Updating a role to be primary for a user</i>, 11.2.6 <i>Remove roles for a user</i> updated to describe the new way of adding and editing roles in Clinic.• Previous section 11.2.5 <i>Administrative roles</i> removed as this information already is included in the new instructions in Chapter 12.

13. References

Title	Description
Content Studio User Manual	The Content Studio manual covers the management of medical content in Manage.
Business rules User Manual	The manual describes how to edit business rules through the Manage Manage User Interface. Rules are written to configure customer flows and to allow flexibility to adjust the system towards the customer business needs.