ENGLISH

platform24

User Manual – Manage

Manage v3.112

Manual version 8.0
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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.

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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

 Consult the instructions for use for important information such as warnings and cautions.

4. Warnings

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

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
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

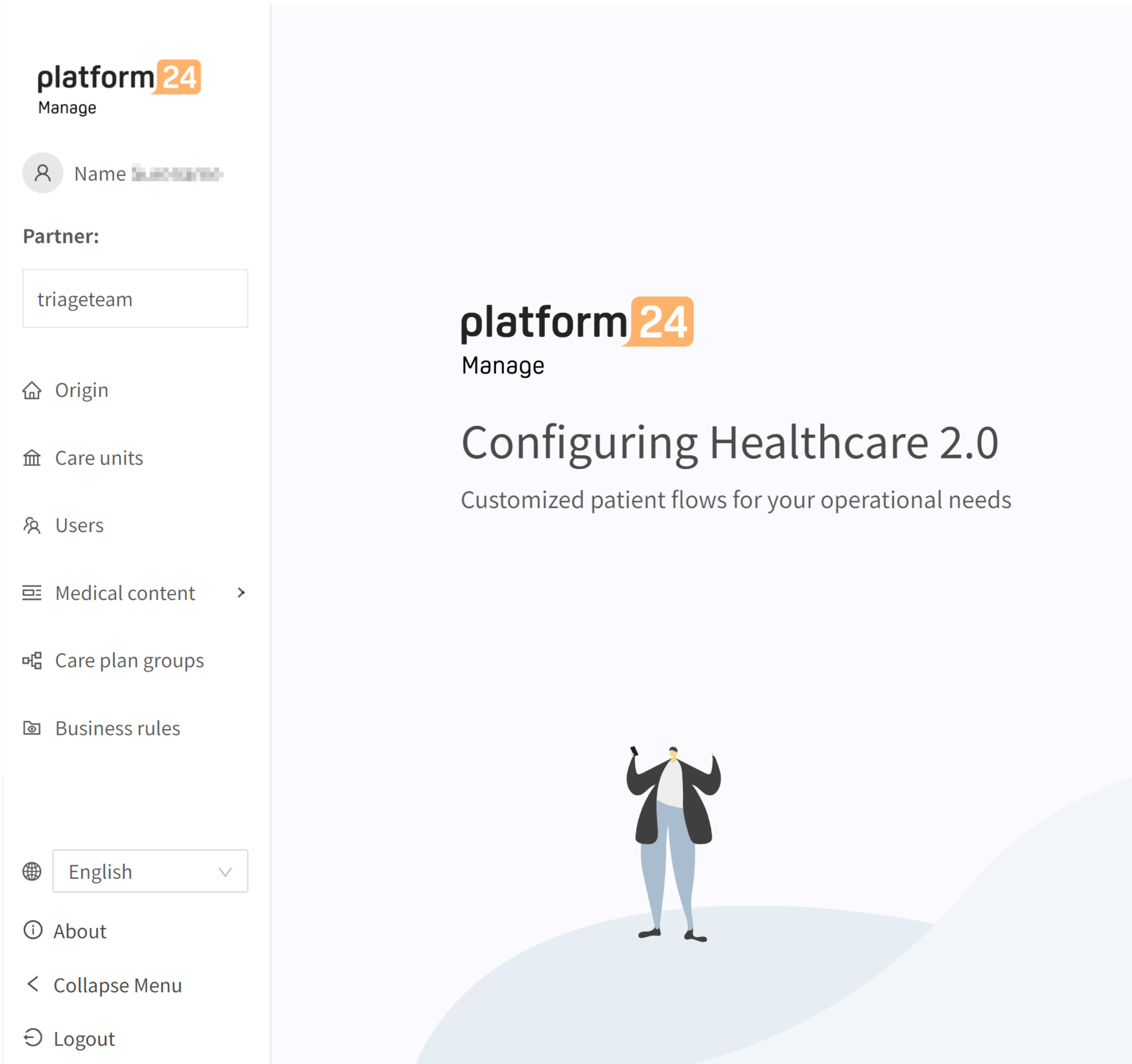
5.1. What is Manage?

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 [68]).



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

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

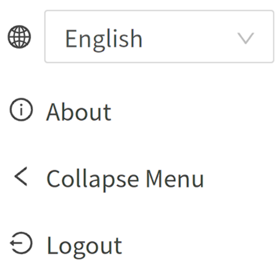
   > **NOTE**
   > Some customers might have a unique environment link. Talk to your superuser if the link does not work.

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.

5.5. Log out of Manage

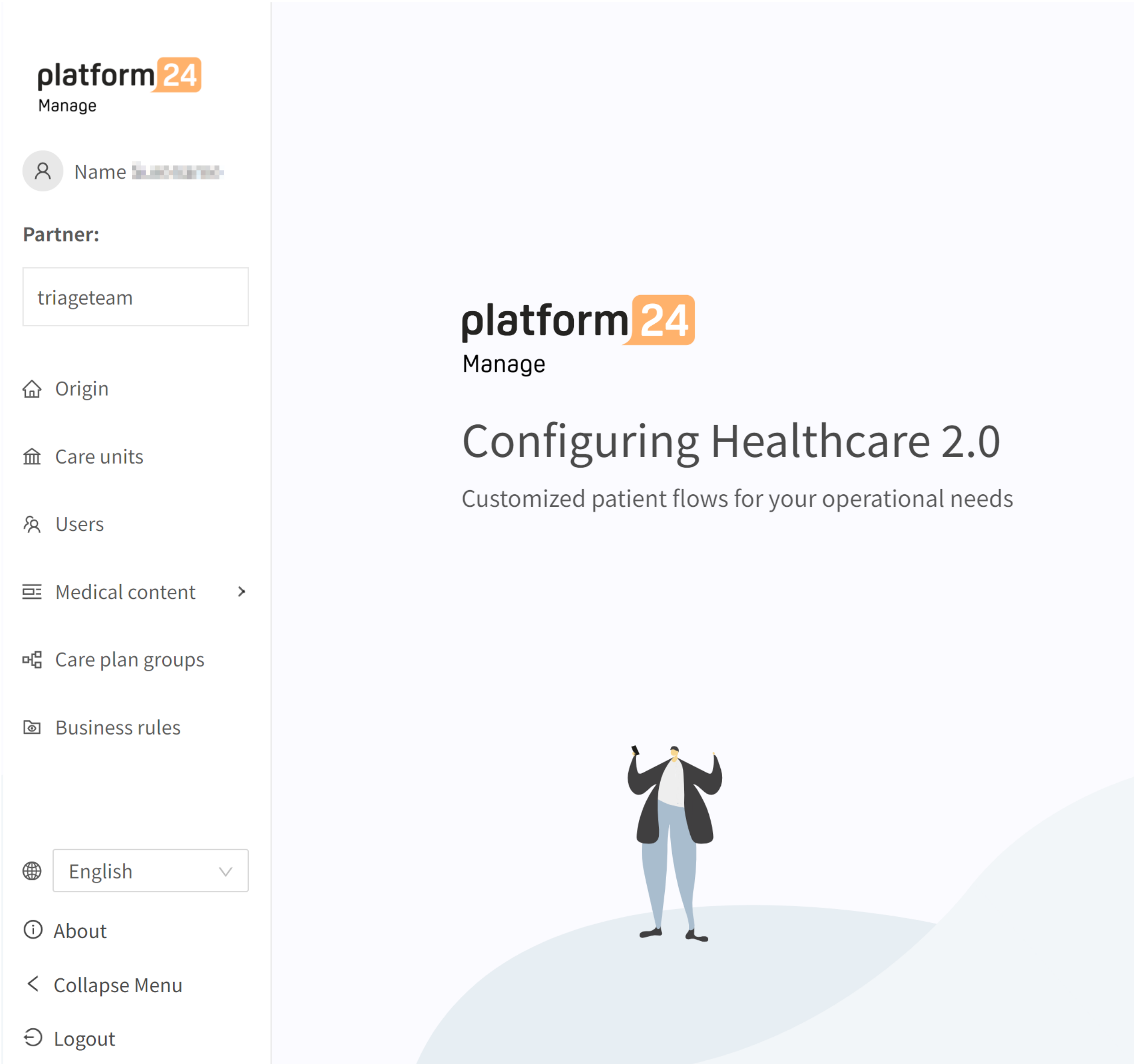
To log out of Manage, click **Logout** in the lower left corner.



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 [18] for details.

Care units

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

See Configurations and settings for care units in Clinic [31] for details.

Users

Used to administer users, roles and permissions.

See Administering users in Platform24 [34] for details on how to administer users. See Administering roles and authorizations for Manage [38] and Administering roles and authorizations for Clinic [43] for details on how to administer roles and permissions.

Medical content

Used to edit the medical content that is used in the Triage24 product.

See the separate user manual for Content Studio (References [68]) 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 [68]) 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.

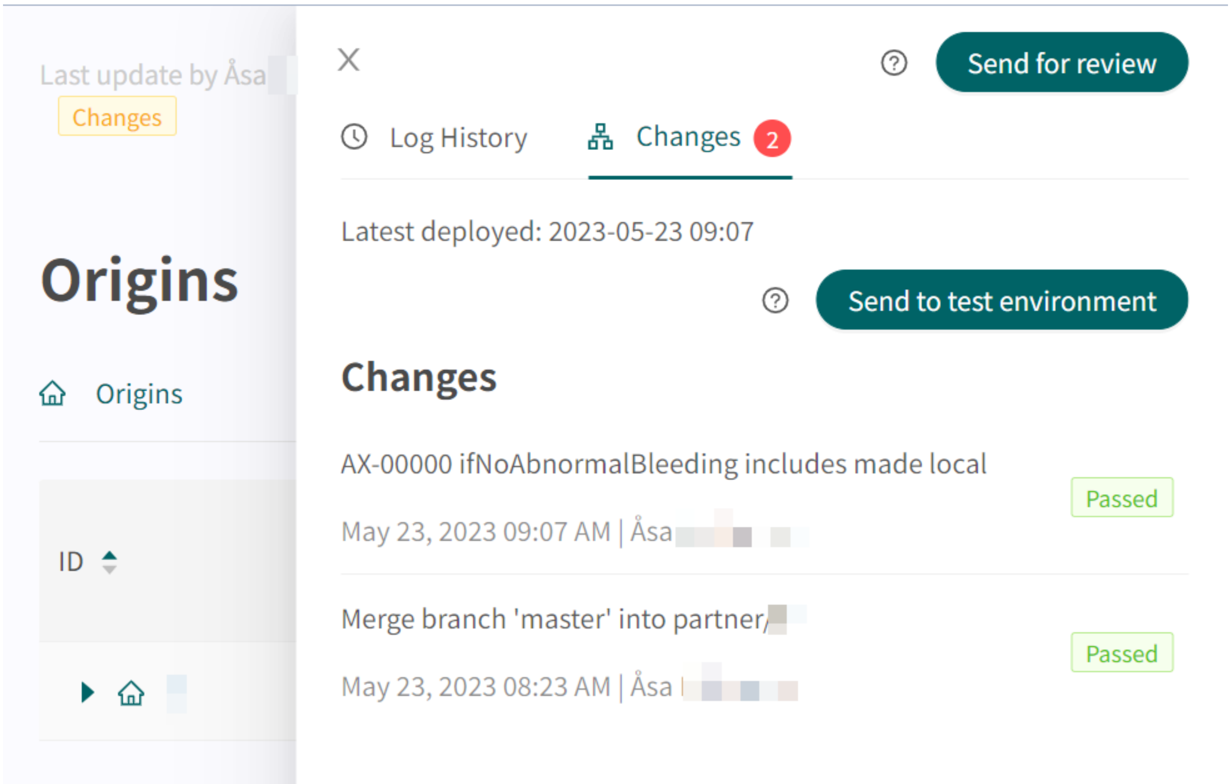
At the top and to the right of the Manage logotype, you can always see who has made the latest change for the partner currently selected in the left side menu.

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.

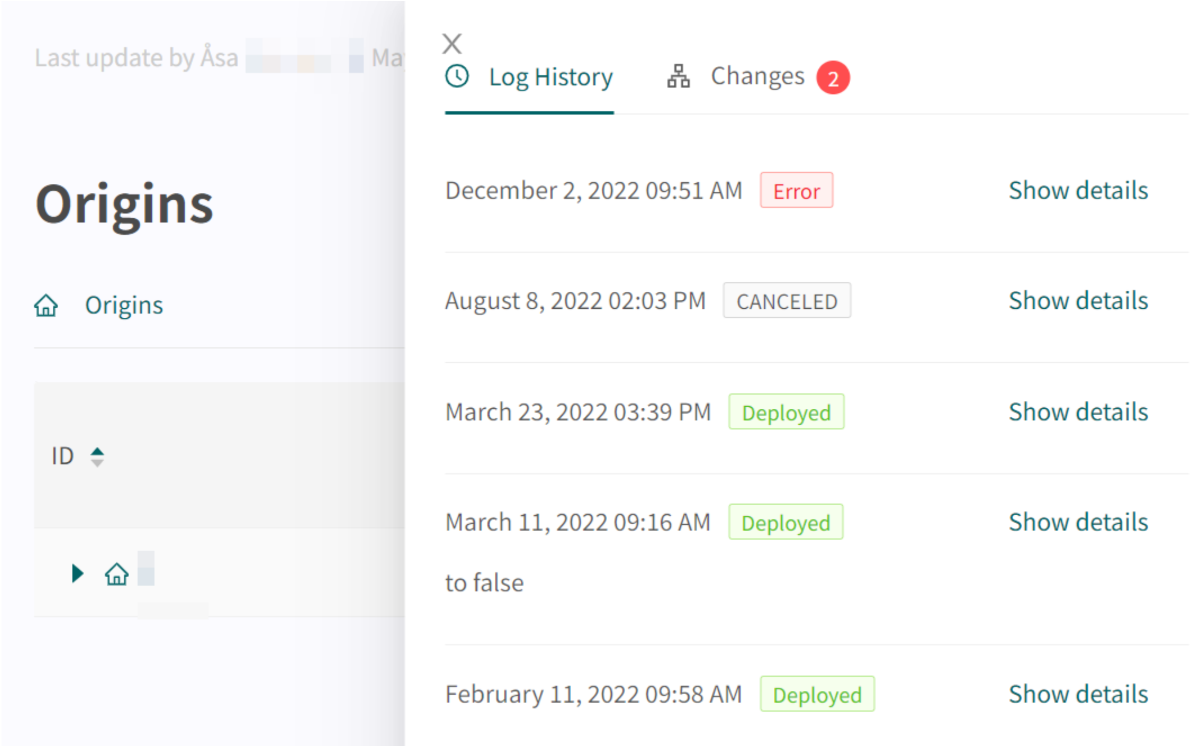
Any changes made for the partner since the last production release will be displayed in the list. What the change was, who made the change, what date and time and whether the change has been saved correctly can be seen under **Changes**. The number of changes is displayed and listed in the red box. The 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.



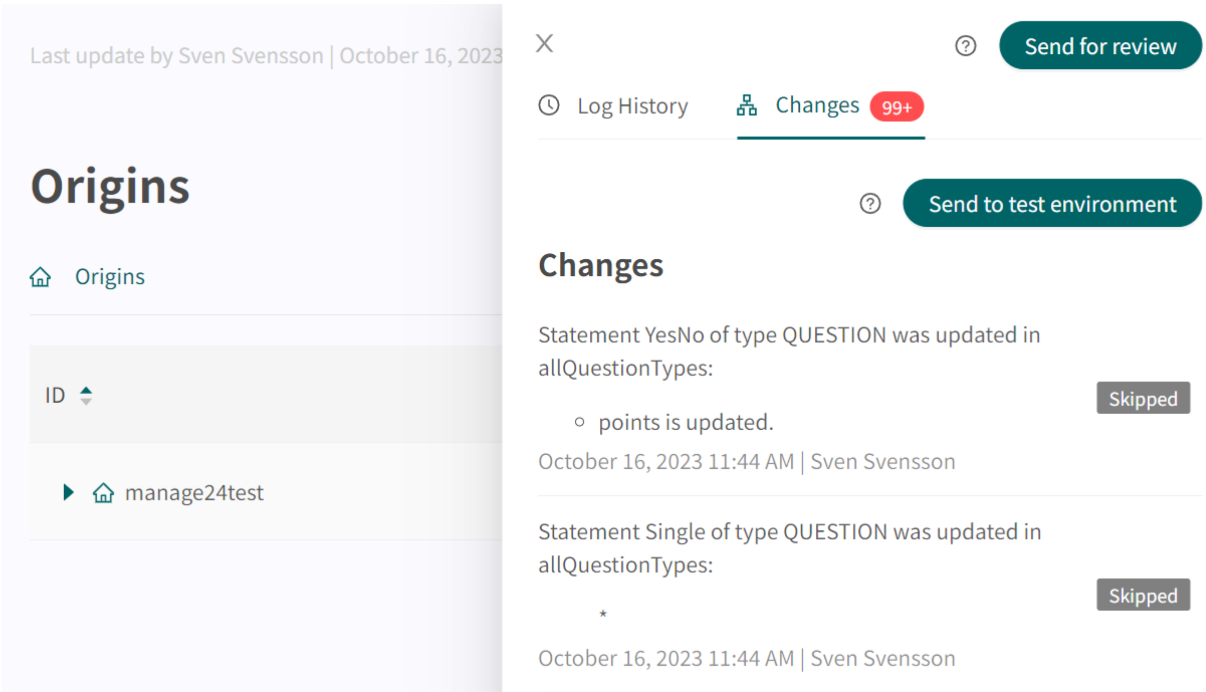
In order for changes in Content Studio/Manage to be updated in the demo application for the Patient app and Clinic (demo/test environment) one must actively upload the changes. When the button “Send to test environment” is green (within the Change log tab), there are new changes that can be sent out 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.

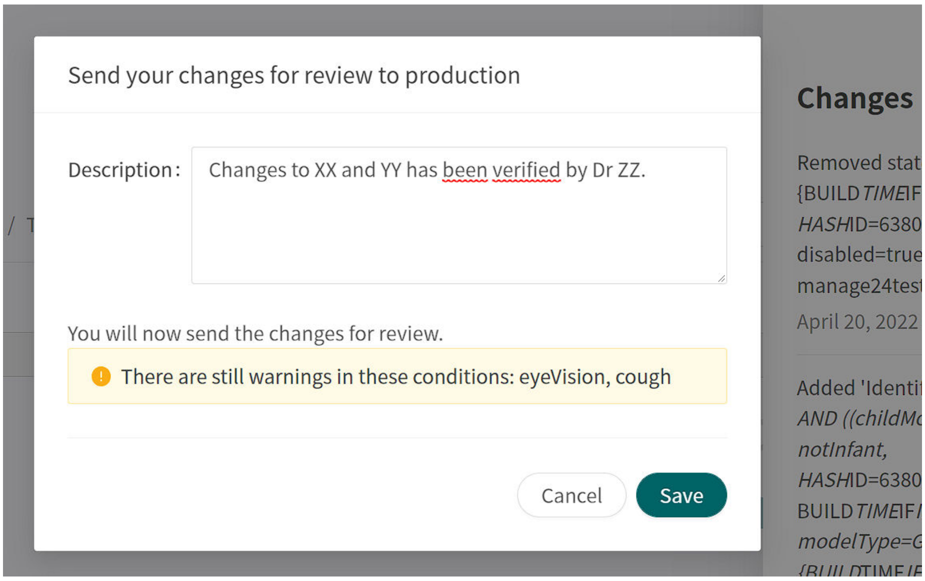
6.3. Sending changes for review to Production

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.

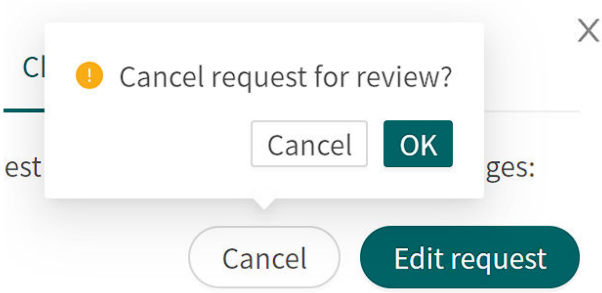


To release the changes made for the partner into production, click on "**Send for review**", describe what changes have been made and the required impact of the changes. Send the request and wait for the technical review to be completed and it has been released into production.

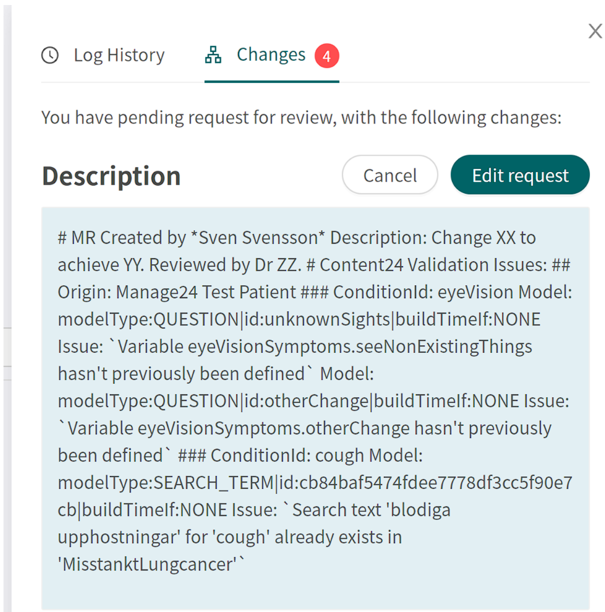




You can cancel the request by clicking **Cancel**, if a review of further changes has to be carried out for the partner.



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.



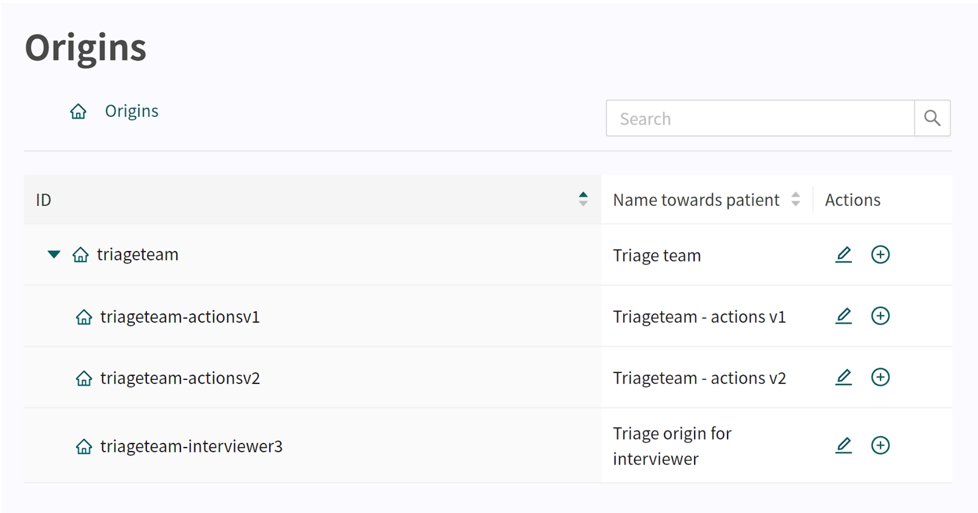
7. Configurations and settings for Origins in the Patient app

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.



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 🖉.

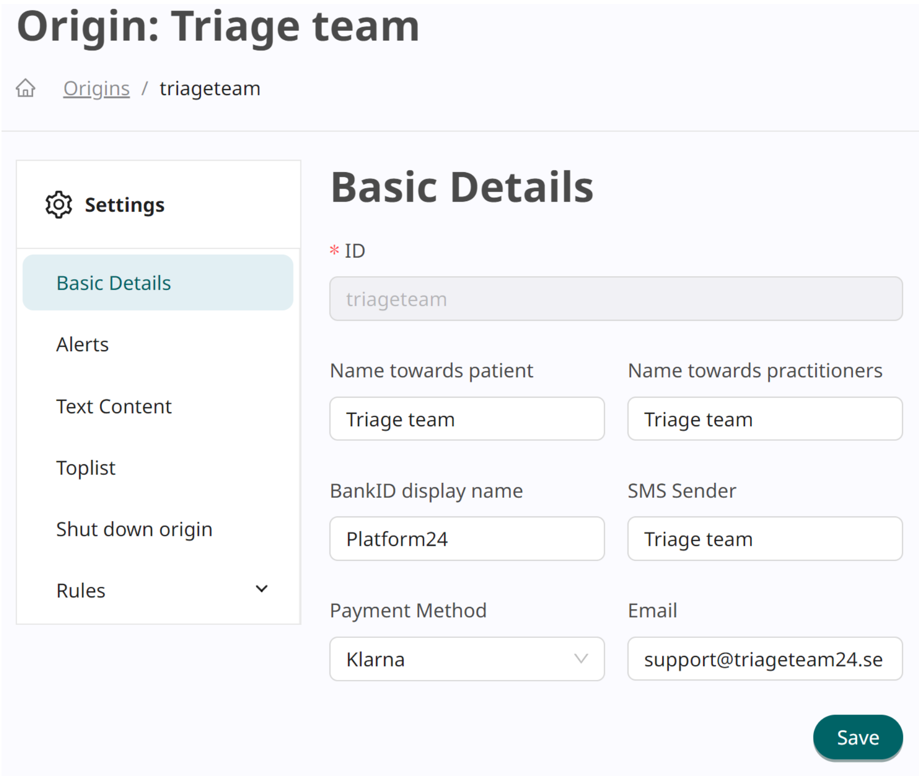
NOTE

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

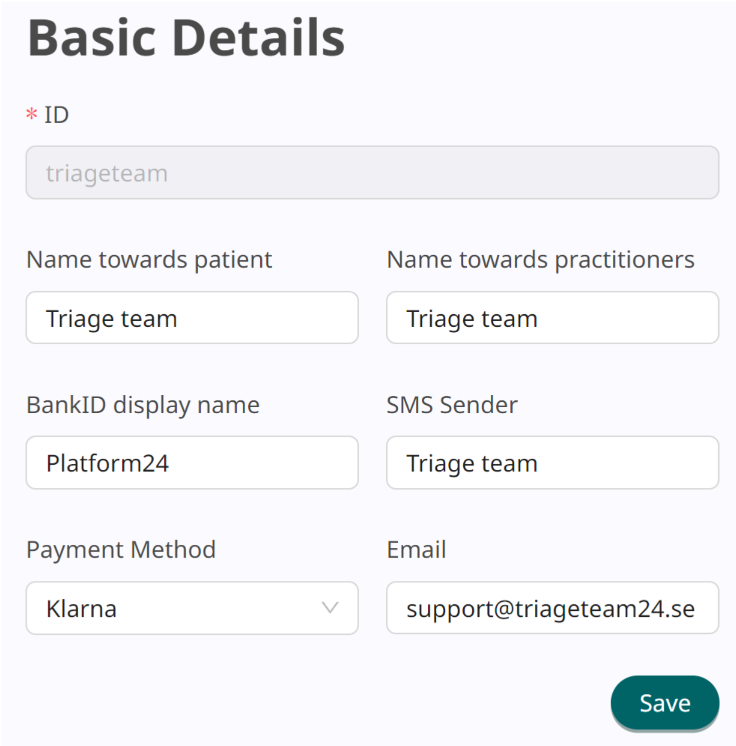
To select which Patient app/origin to edit, click on the pen at the end of the row.

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.



7.2.1. Basic details

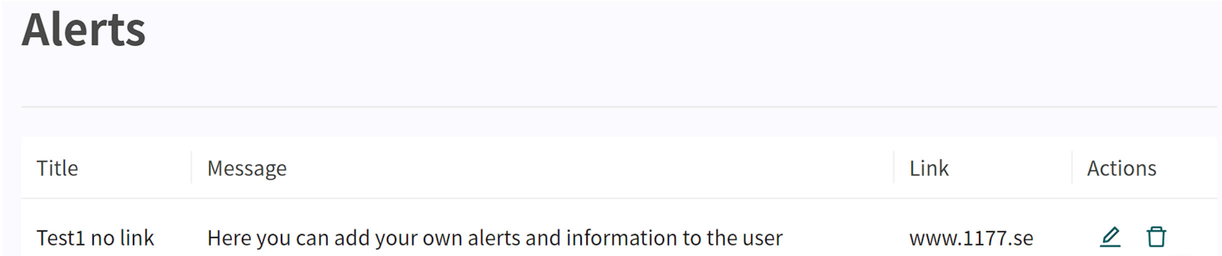
Basic Details is the section where the basic information is set for the patient origin. Do not forget to click **Save** after you have edited the information. The **Save** button is located on the bottom right side of the page, just above the **Add roles to origin** section.

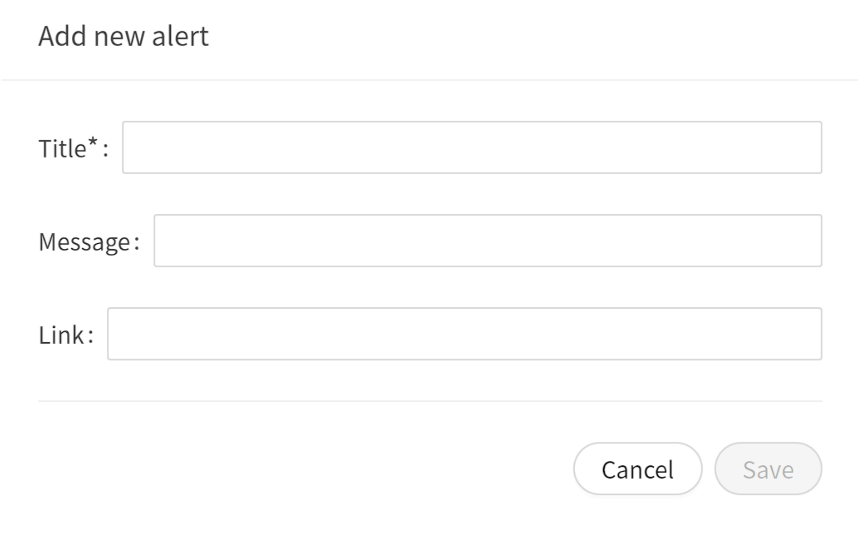


ID	The ID used throughout the entire system to refer to this specific origin.
Name towards patient	The name visible to the patients in the patient app and in SMS or emails.
Name towards practitioners	The name visible to the practitioners in Clinic if a patient connects through this origin.
BankID display 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	**Payment methods** can be set to **Offline** or **Klarna** by using the drop down list. **Offline** — With the **Offline** setting, the care providers take responsibility for invoicing. **Klarna** — Using **Klarna**, the payment is processed before the patient can initiate an appointment. It is possible to use rules to set which sums to apply on different patient flows. Contact your implementation manager to configure your pricing.
Email	The email address communicated to patients, e.g. in emails.

7.2.2. 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.





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.

7.2.3. 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!	

< 1 >

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

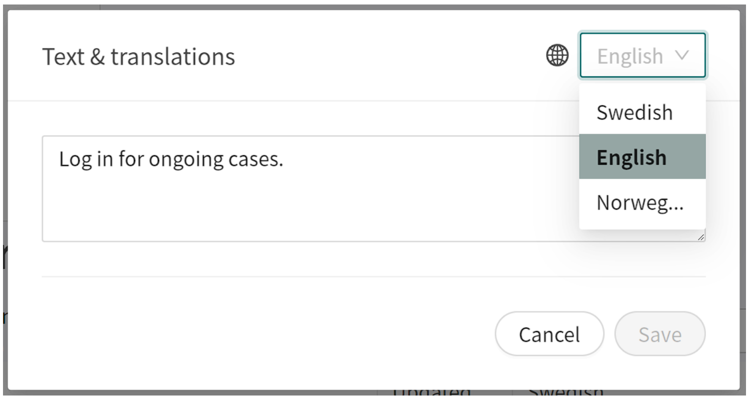
Updated A checkmark shows that the text has been updated and is specific for the partner. If there is no checkmark in the column, the text is the same as the default setting from Platform24.

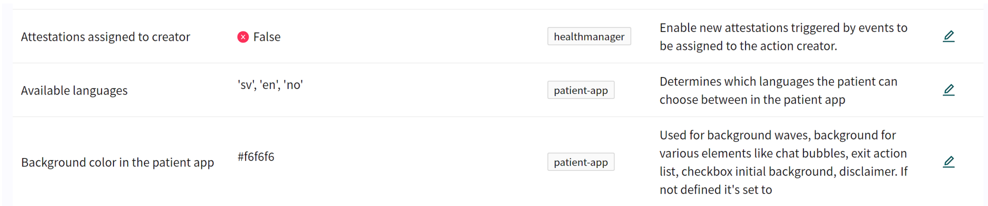
Language The languages that are defined to be used as default for the Patient app are visible here. The languages can be changed via the **Customizations** menu item through the setting **Default language**.

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**.

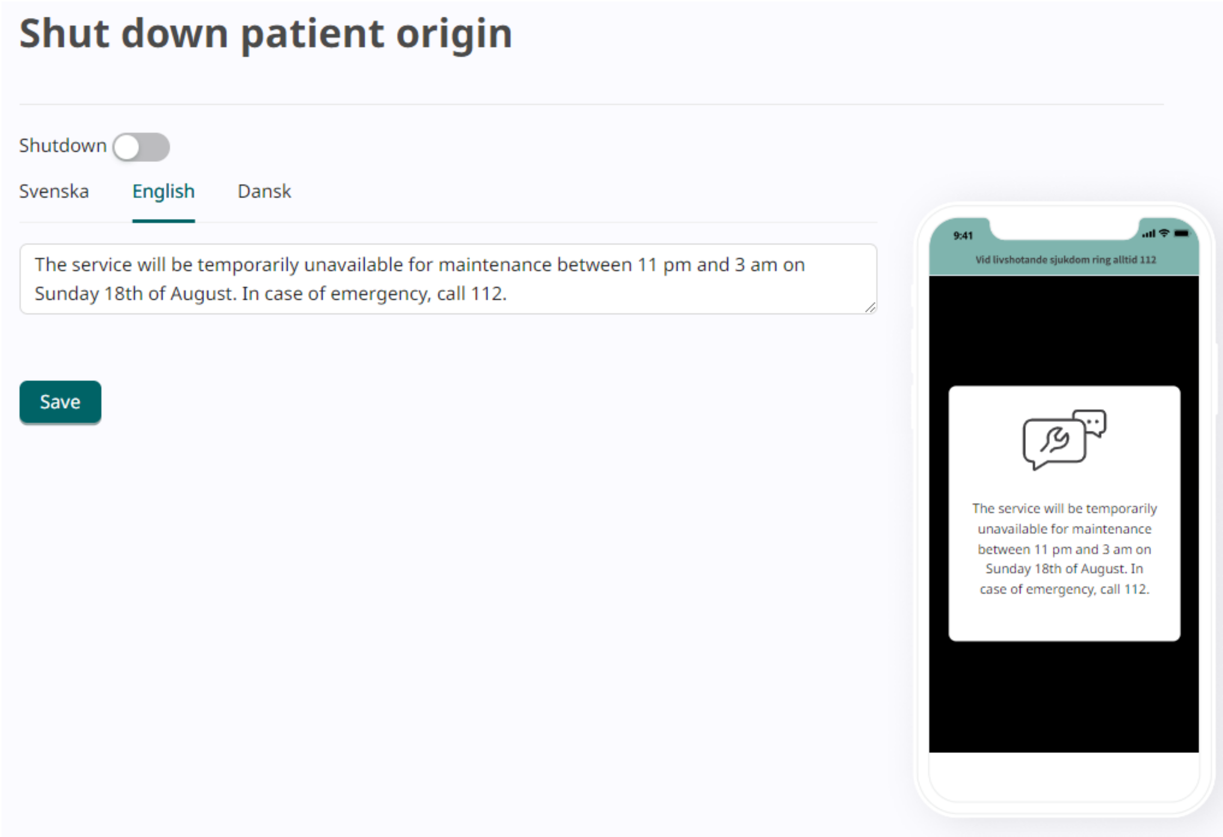




7.2.4. Shut down patient origin

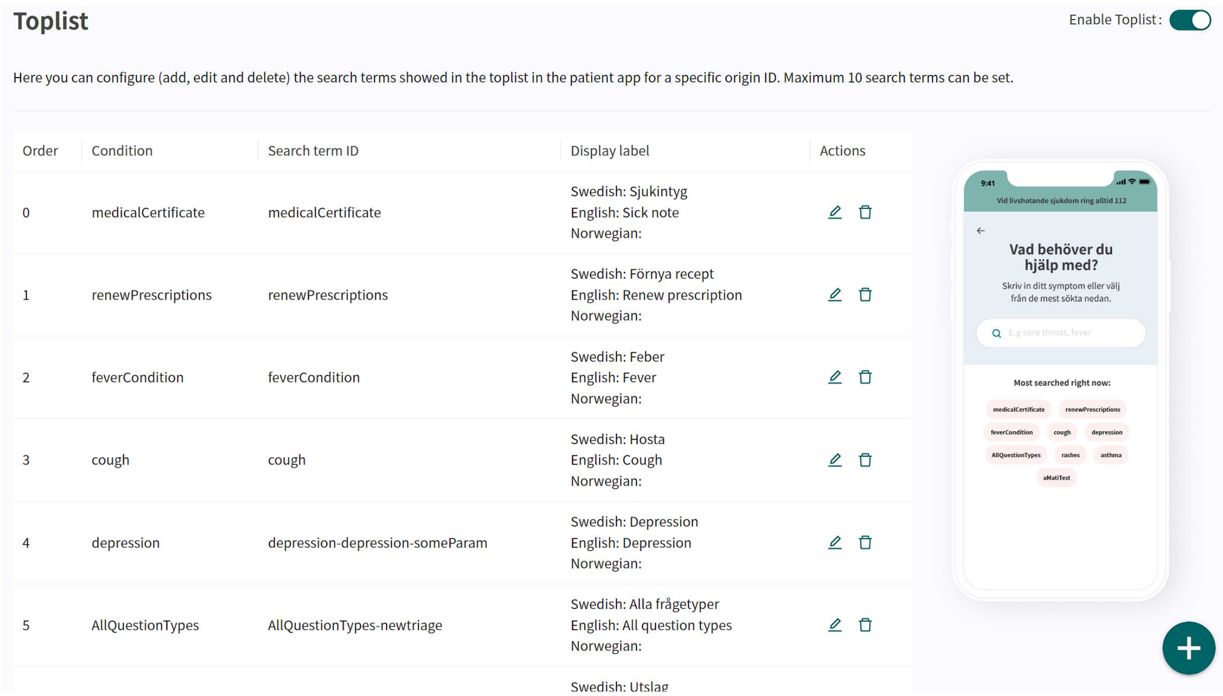
Shut down patient origin shall be used if there is a need to temporarily shut down a Patient app so that patients cannot log in. The functionality shall be used with care and the shut down must be reverted when the Patient app shall be open for patients to log in again. To configure a shutdown, the user must have configuration administrator role on origin level in Manage.

If a shutdown is required, it is recommended to add a message that will be displayed in the Patient app. Type in the message in the message box, add translations in the corresponding tabs (if applicable), and click **Save**. The message will be displayed in a preview to the right in the user interface.



7.2.5. 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.



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.

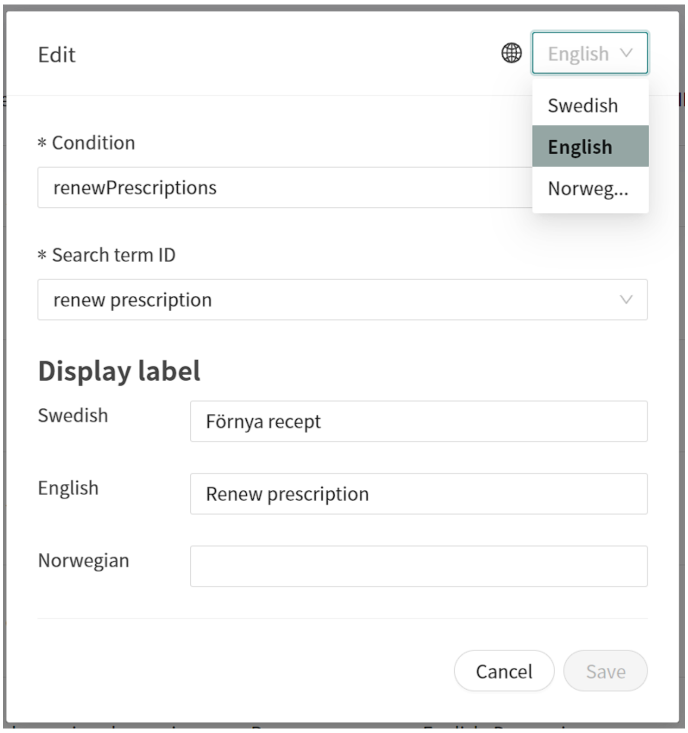
It is possible to have a maximum of 10 search terms in the **Toplist**. The preview of the Patient app on the right shows what the **Toplist** will look like in the app, and is updated when a change is made for the partner.

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.



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.

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.

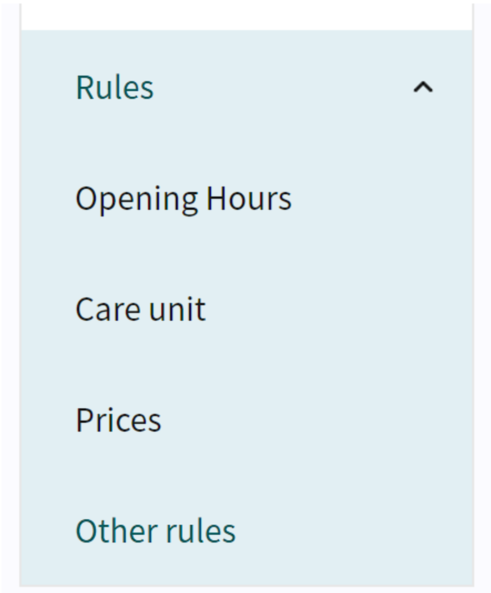
7.2.6. Rules

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.

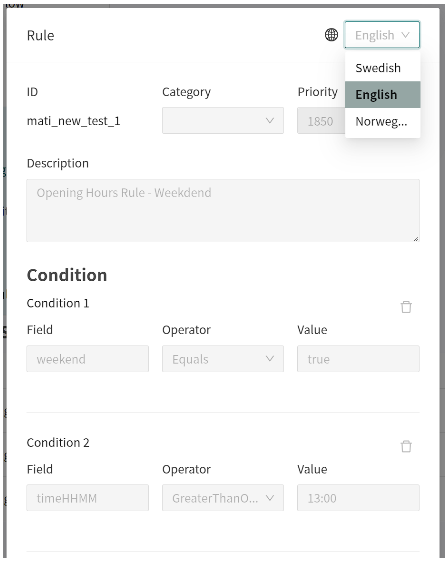


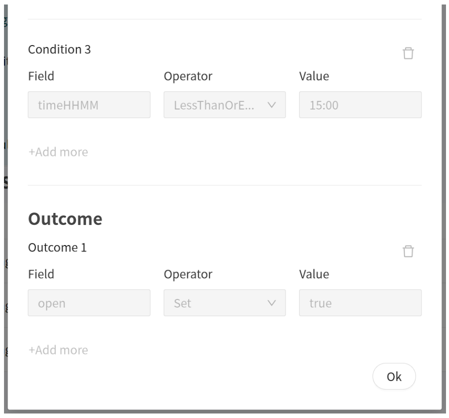
Opening Hours

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

Rules

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

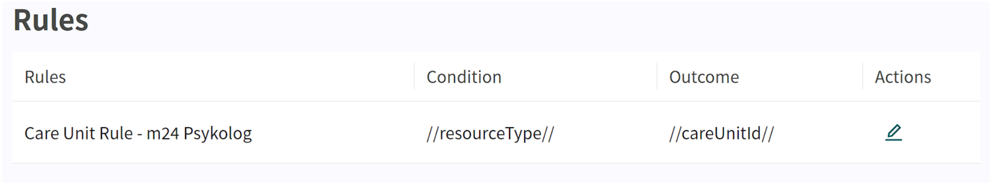


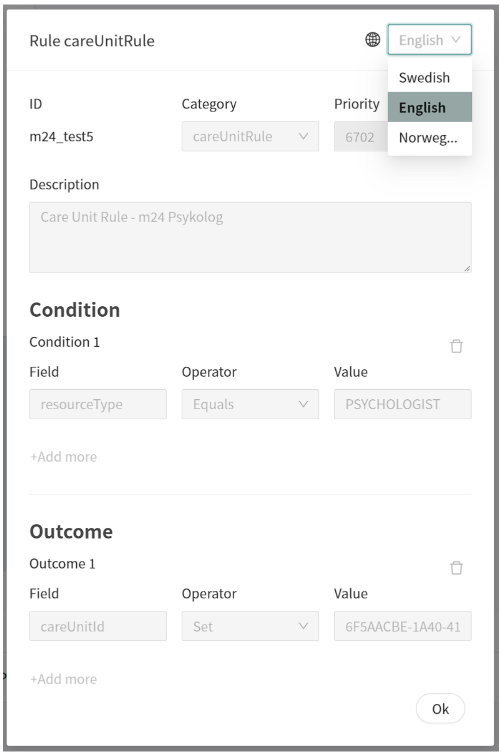


Click **Ok** in the bottom right of the screen to leave the rule.

Care unit

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





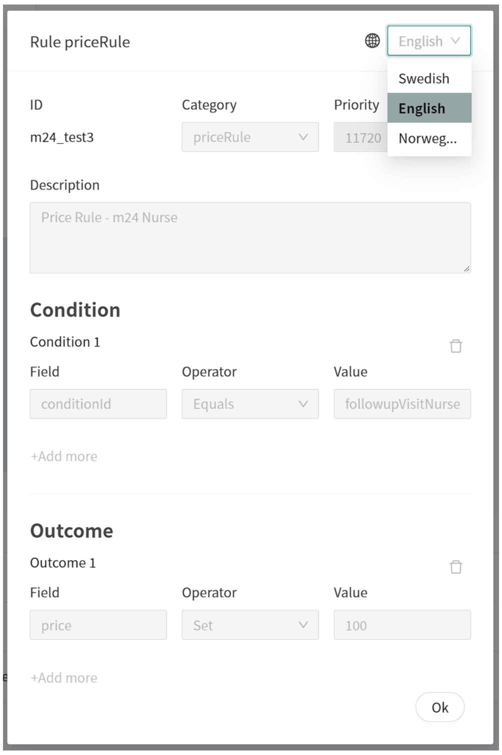
Click **Ok** in the bottom right of the screen to leave the rule.

Prices

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

Rules

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



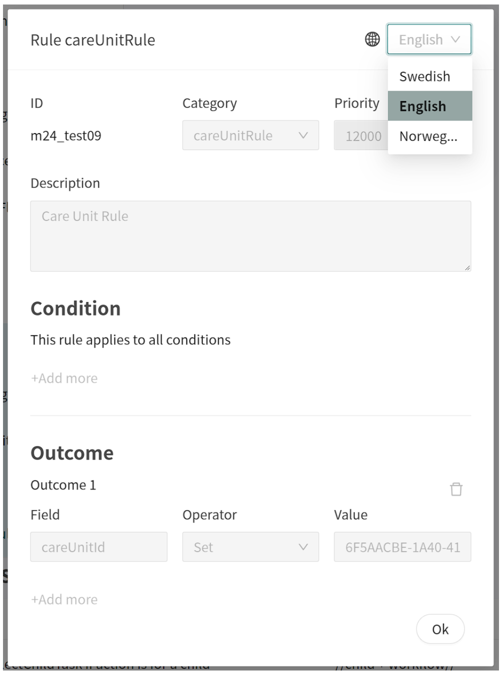
Click **Ok** in the bottom right of the screen to leave the rule.

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//	



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

8. Configurations and settings for care units in Clinic

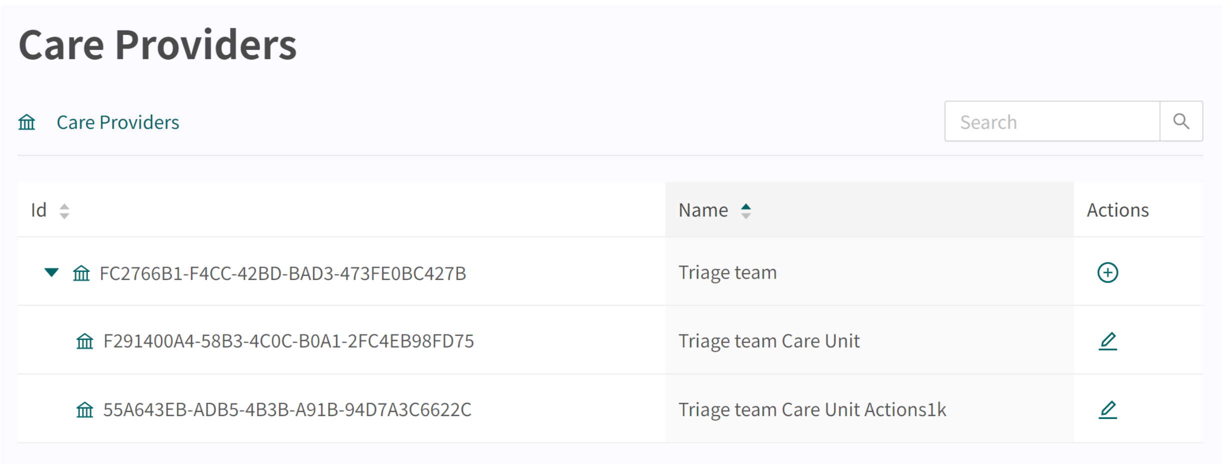
WARNING
All changes made using Manage can affect the patient flow and the recommendation to the patient.

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**.

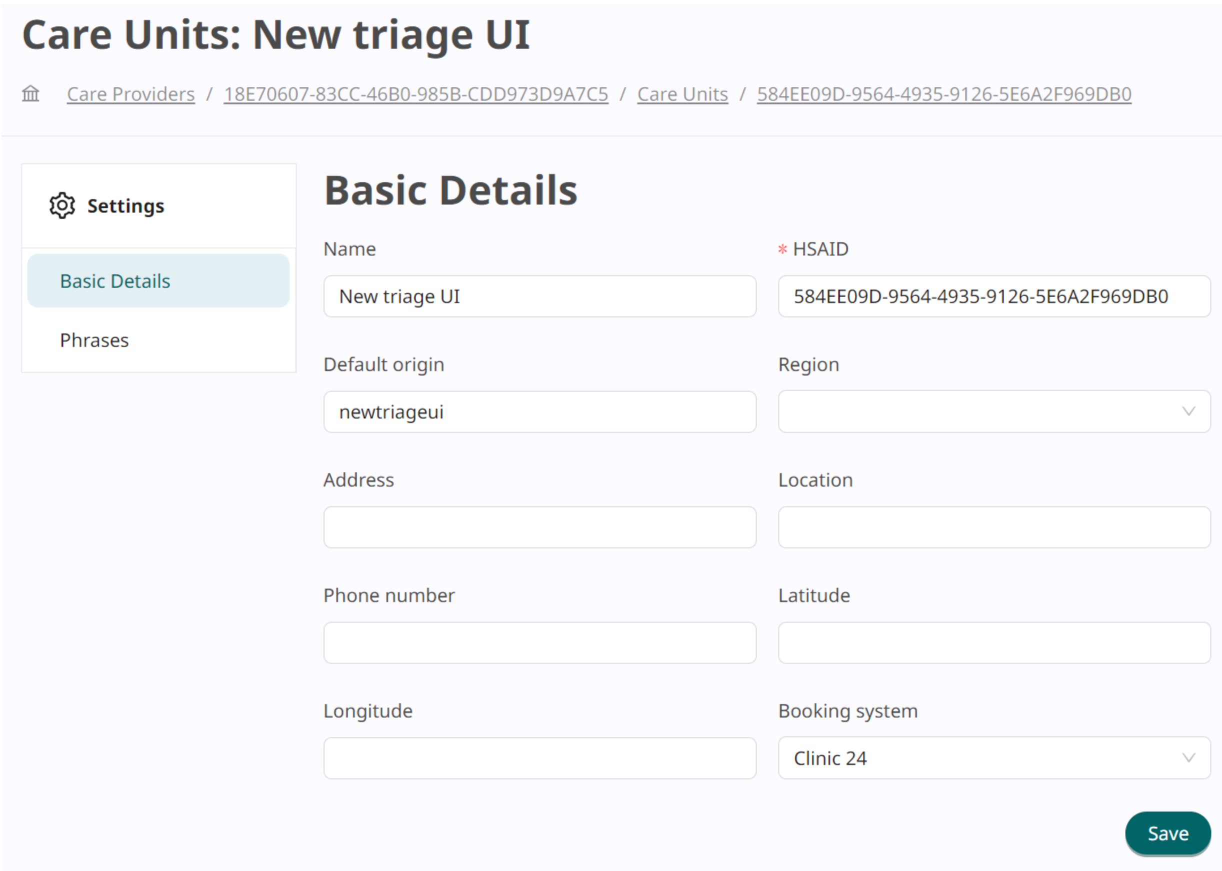


The **Care Provider** data is not possible to edit at this time, so there is no pen icon available on that row. Click the pen for a **Care unit** to access the available alternatives for that unit.

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!



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 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. Phrases

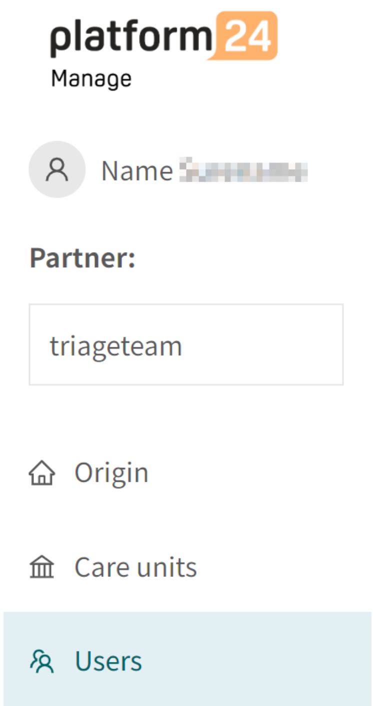
The **Phrases** section contains standard phrases that the care unit can add and send out in meetings with the patient.

The phrases are administered via Manage but sent out in Clinic for the **Care unit** they are defined for. See the Autophrases [58] 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.

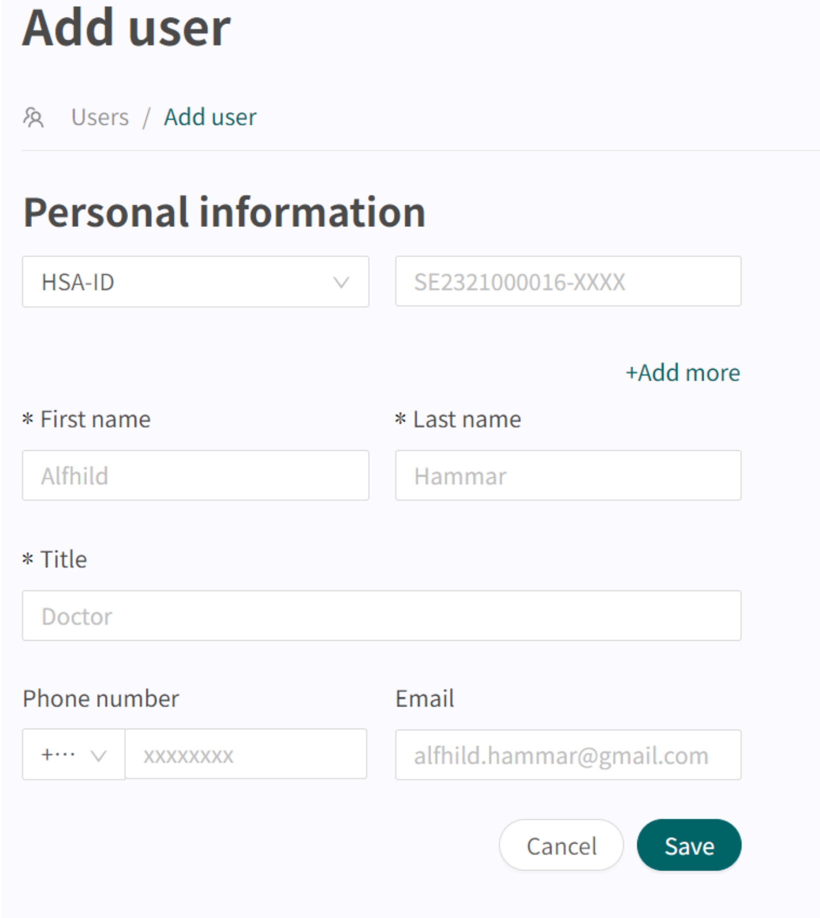
The **Users** menu item is used to manage users with access to Clinic as well as Manage.



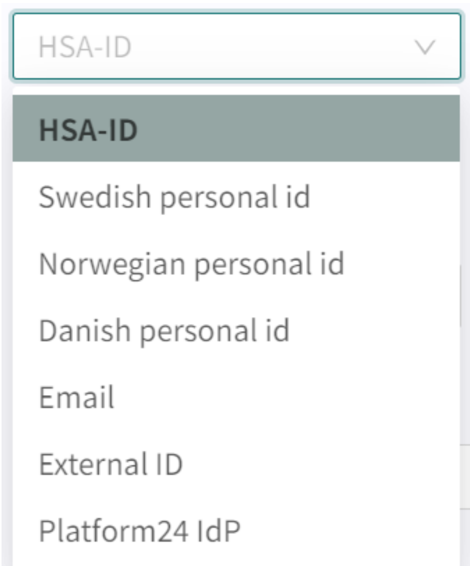
9.1. Add a new user

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.

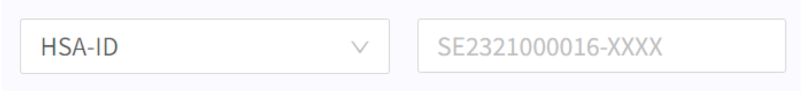


3. Choose the type of ID to be used for login and fill in the login details.

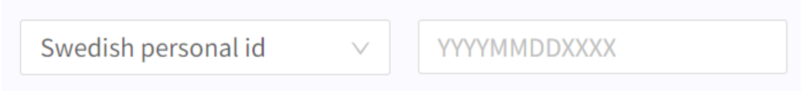


The type of ID depends on what authentication method is used by your organization/unit or country:

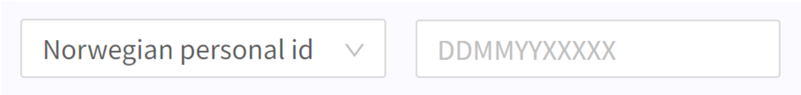
- **HSA-ID**
  Enter the complete HSA-ID number in the format *SE2321000016-XXXX*. It is not enough to fill in the last numbers, the entire HSA-ID number, including the hyphen, must be filled in. This also includes the country code at the start.



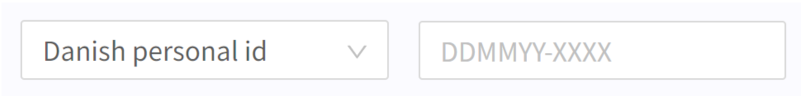
- **Swedish personal id**
  Enter the full Swedish personal number in the format *YYYYMMDDXXXX*, without a hyphen and using the full four numbers for the year.



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

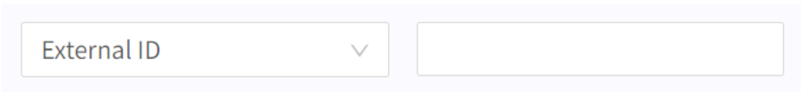


- **Danish personal id**
  Enter the full Danish personal number in the format *DDMMYY-XXXX*.

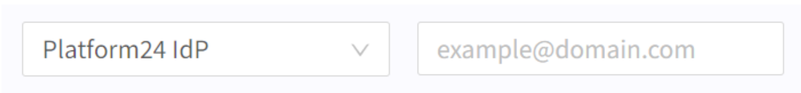


- **Email**
  Enter the email address in the format *example@domain.com*.

- **External ID**
  Enter the external ID (BSN).



- **Platform24 IdP**
  Enter the Platform24 Identity Provider (IdP) in the format *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** Save button in the lower right corner.

10. Administering roles and authorizations for Manage

To be able to log in to Manage, users need to be assigned a Manage role.

10.1. Available Manage roles

Configuration administrator	This user can access and edit configurations for the partner. Access can be granted to make configurations for Clinic or for the Patient app.
Clinic user administrator	This user can add and update user information and assign practitioner and administrative roles in Clinic.

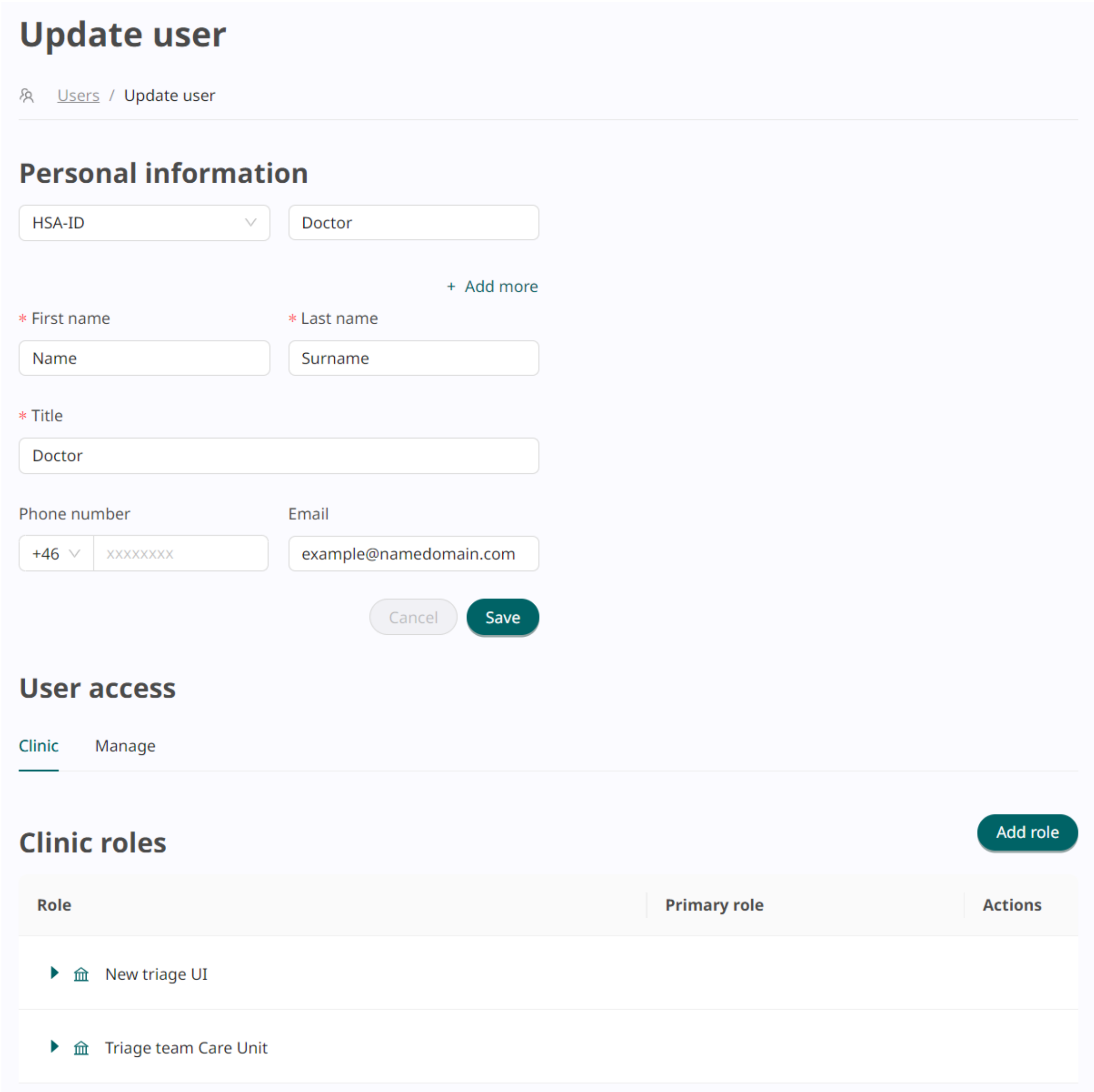
There are also other specialized roles for additional functionality, see below.

Business rules viewer	This user can view the business rules.
Business rules editor	This user can edit the business rules.
Medical content viewer	This user can view the medical content.
Medical content editor	This user can edit the medical content.
Pathways viewer	This user can view the available pathway templates.
Pathways editor	This user can edit existing pathway templates and create new ones.

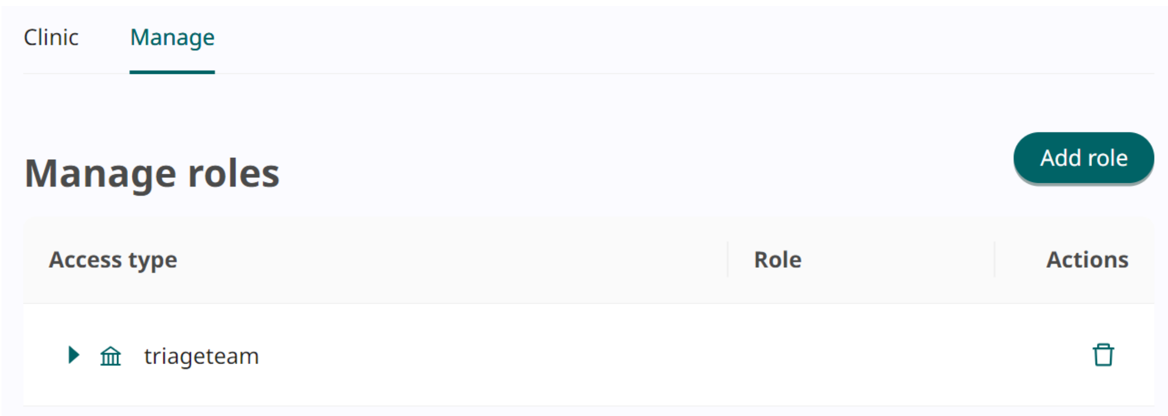
10.2. Assign a Manage role

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.

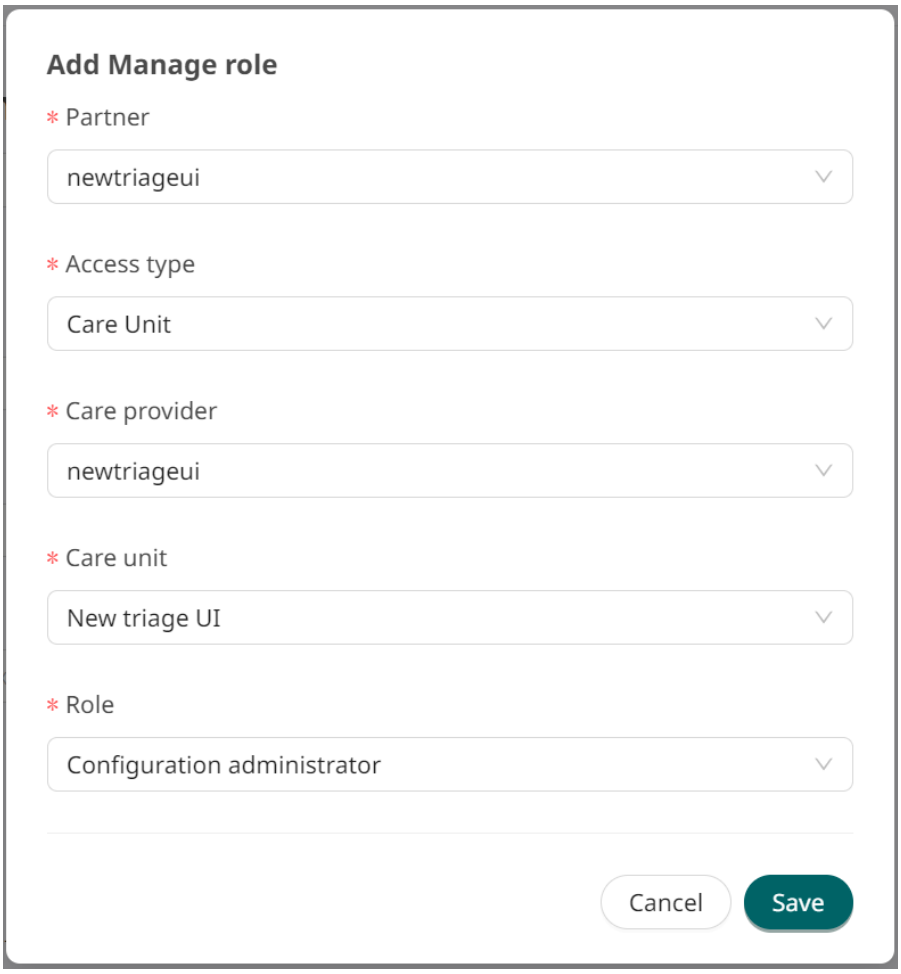
This will open the **Update user** view.



3. Select the **Manage** tab and click the **Add role** button.

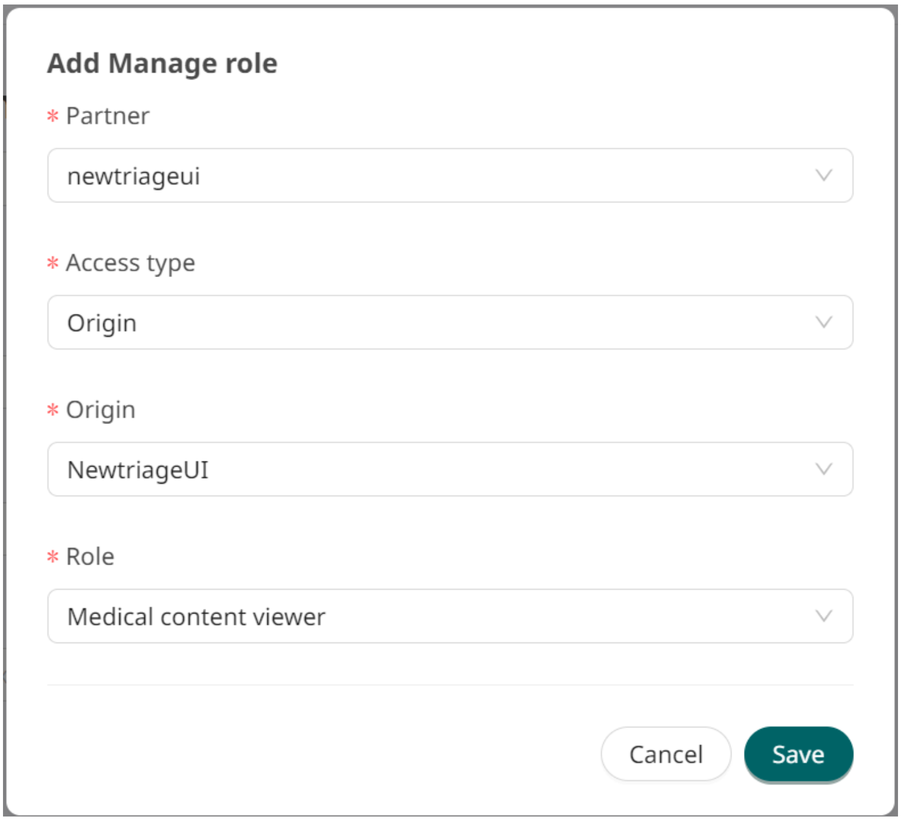


4. If the role should be added to make configurations for Clinic:
   a. Select **Partner** from the drop-down list.



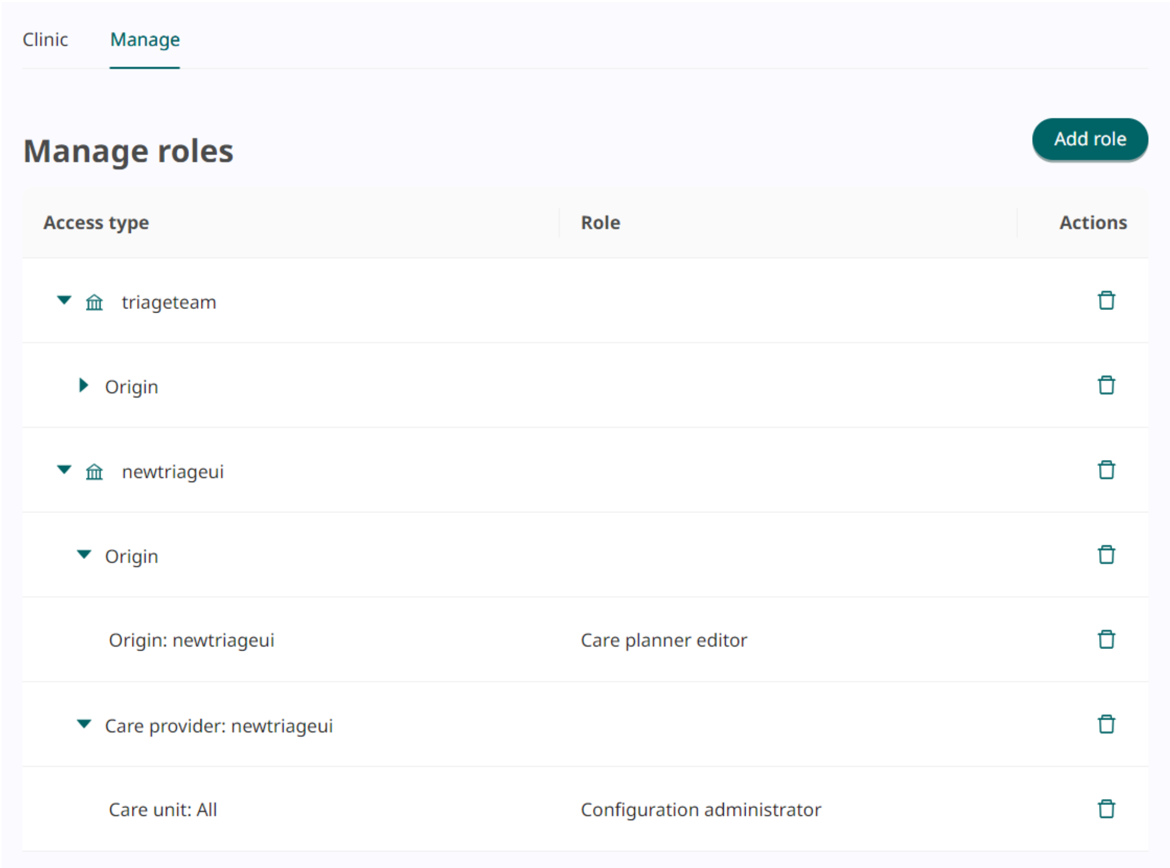
   b. Select "Care Unit" in the **Access type** drop-down list.
   c. Select **Care provider**, **Care unit** and **Role** from the respective drop-down lists.

5. If the role should be added to make configurations for the Patient app:
   a. Select **Partner** from the drop-down list.



   b. Select "Origin" in the **Access type** drop-down list.
   c. Select **Origin** and **Role** from the respective drop-down lists.

6. Click **Save**.
   The added roles for the selected partner will appear in the **Manage roles** list. Here it will also be visible if the role was added on care unit or origin level.



11. Administering roles and authorizations for Clinic

11.1. Preparations

11.1.1. Appoint an administrator for the care provider

Each care provider needs to appoint one or more Clinic user administrators. The Clinic user administrator in turn appoints Clinic user administrators at the respective care units.

11.1.2. Appoint an administrator for the care unit

Each care unit needs to appoint one or more Clinic user administrators.

The Clinic user 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 Clinic user 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.

11.1.3. 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 provider.

Required information about the administrator user when informing Platform24:

- Name
- Email
- ID used for login. See section Add a new user [34].
- Care unit or care units the user is going to administrate

11.1.4. 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 Clinic users.

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.

11.1.5. 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.

11.1.6. 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
- ID used for login. See section Add a new user [34].

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 [34].

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.

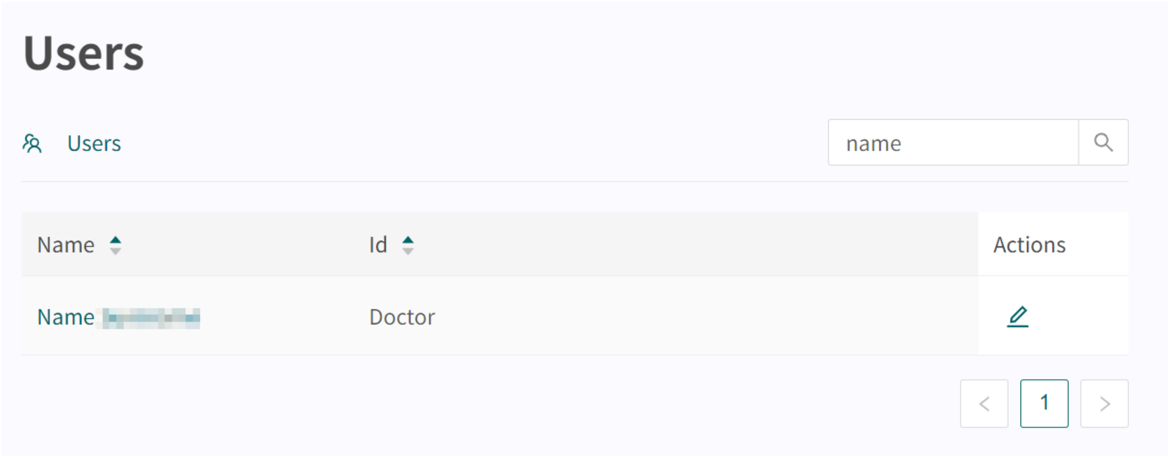
Primary role
If the user will work in more than one care unit, the unit in which the employee usually works should be selected as the **Primary role**.

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 [45] for all the different care units the user require authorization for.

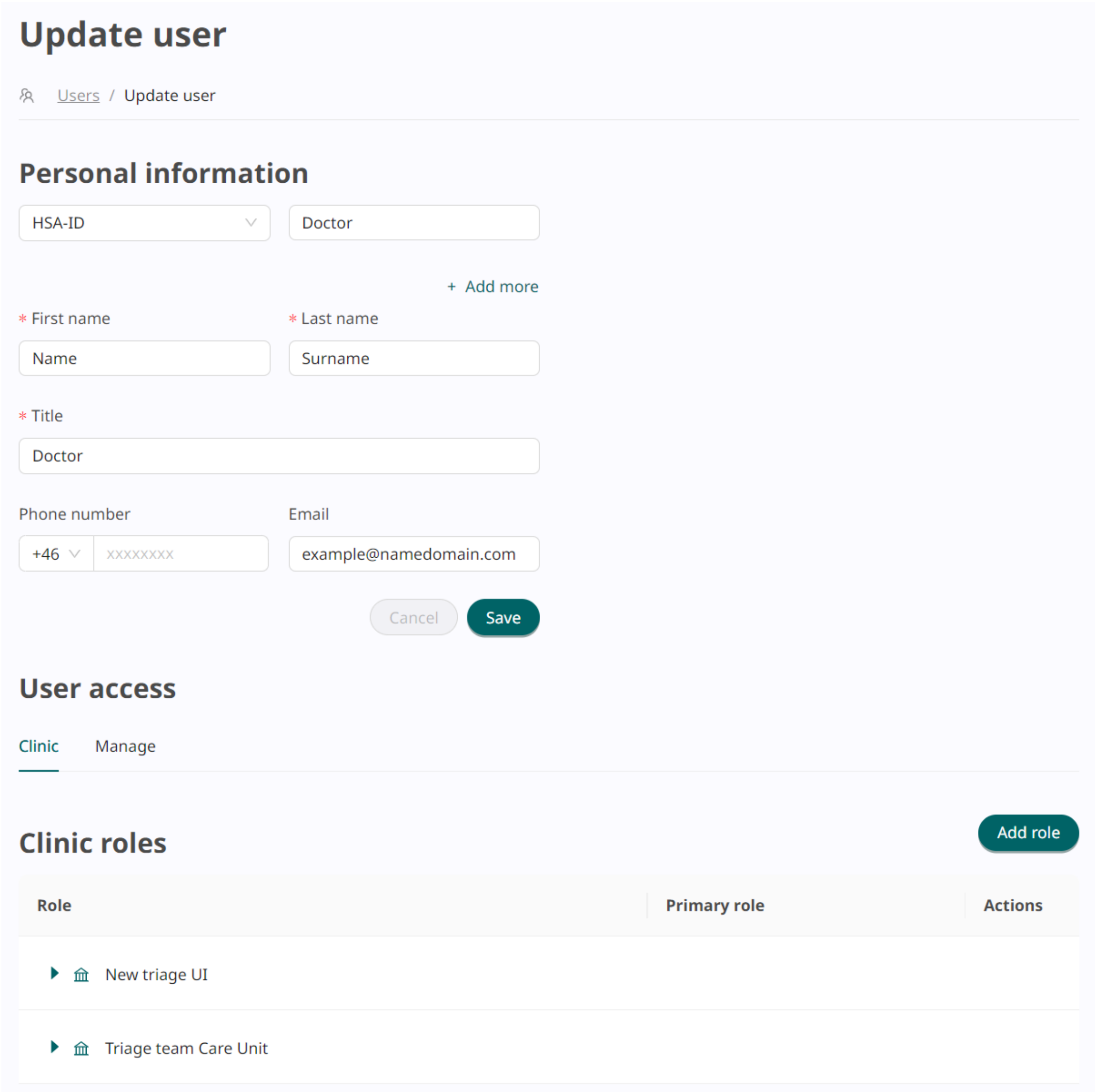
11.2.2. Assign a practitioner role

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

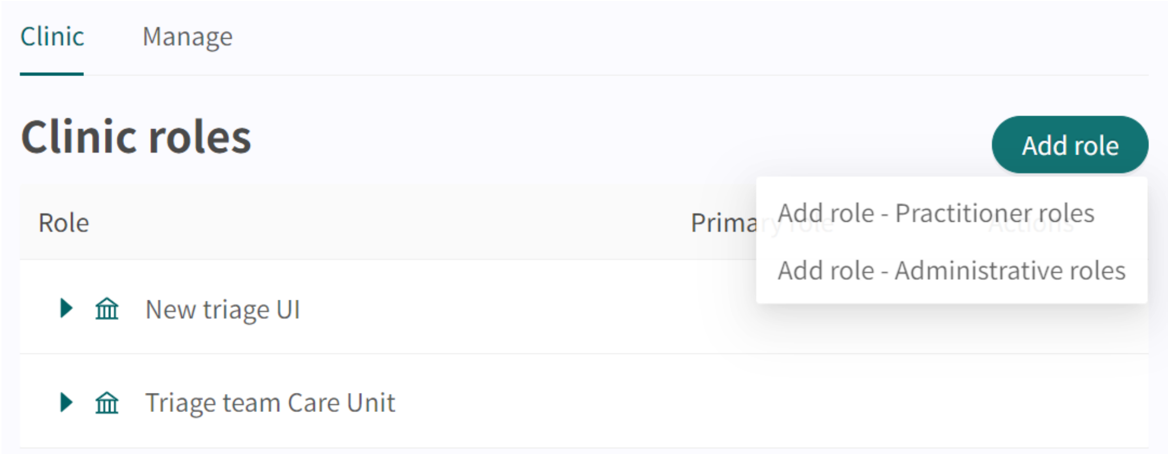
2. Search for the user in the search field and click on the user's name in the list.



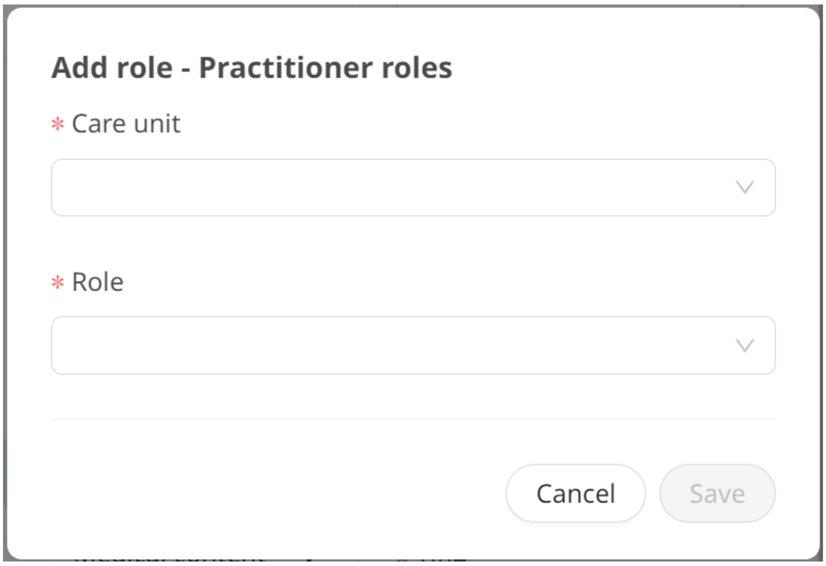
This will open the **Update user** view.



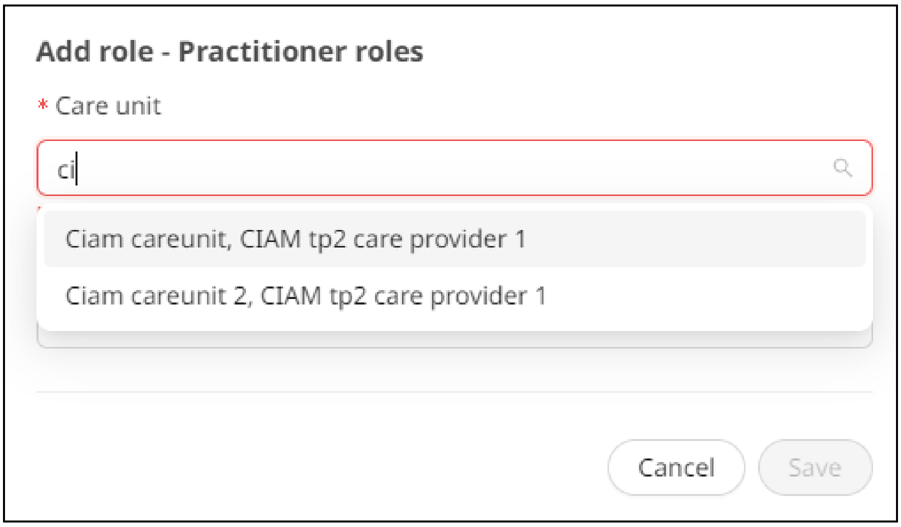
3. Make sure that the **Clinic** tab is selected. Click the **Add role** button and select the **Practitioner roles** option.



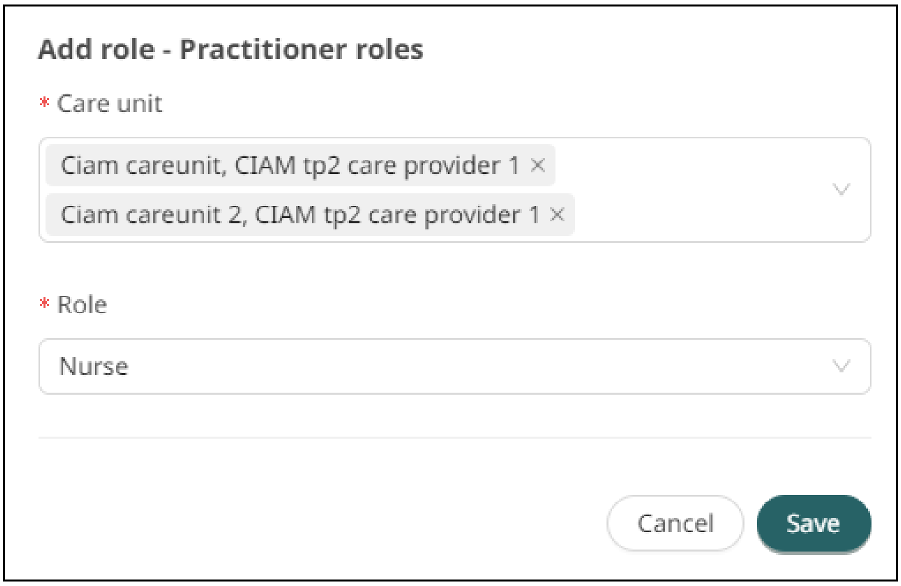
This opens the **Add role - Practitioner roles** dialog.



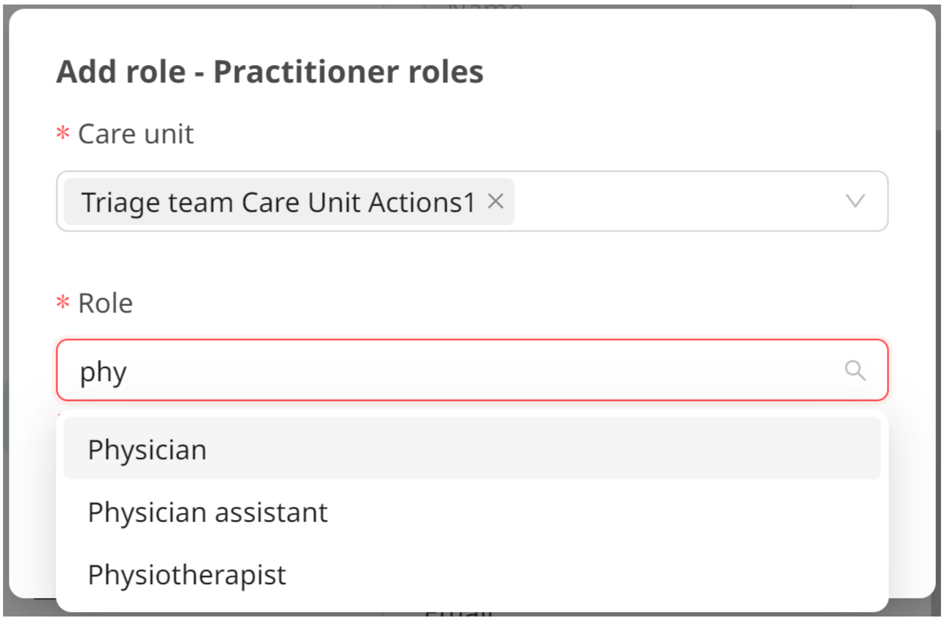
4. Select care unit:
   a. Click the **Care Unit** field.
   b. Select a **Care Unit** from the drop-down list.
   You can either scroll through the list or search for a care unit by typing in parts of the care unit name.



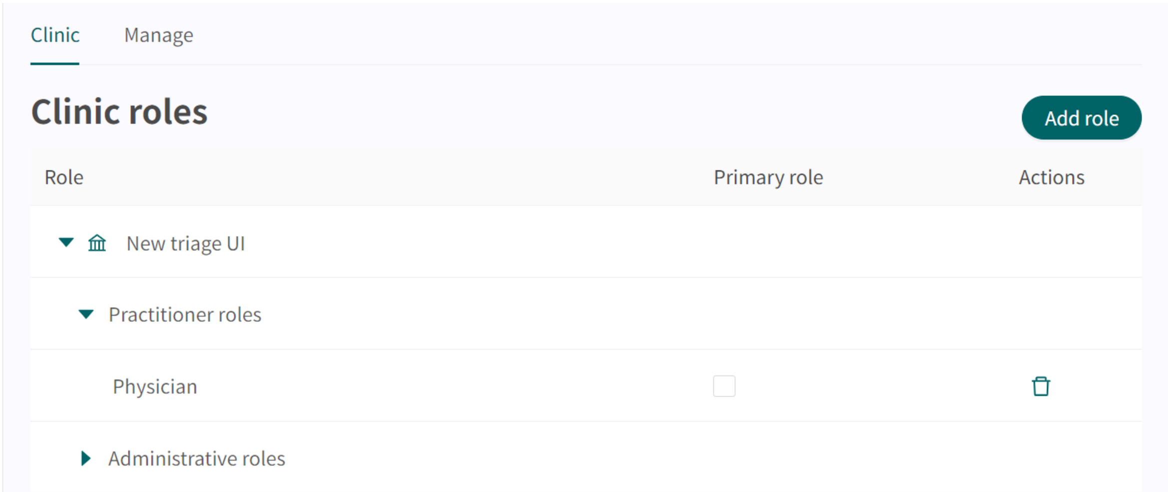
NOTE
If the user is to have the same role in more than one care unit, multiple care units can be selected at the same time.



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



6. Click **Save**.
   The added roles for the selected care units will appear in the **Clinic roles** list.



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

Note that this role will be phased out and replaced with the Configuration administrator role or the Clinic user administrator role, depending on the need.

Assess irregularities

The **Assess irregularities** role gives access to the **Irregularity** section of Clinic, where reported irregularities can be found and assessed.

Care planner

This user can work with remote patient monitoring in Clinic. This includes:

- See the list of patients who are remotely monitored at a care unit.
- Add a patient to a remote patient monitoring plan.
- Make adjustments to an existing remote patient monitoring plan.
- Be added as responsible practitioner on a remote patient monitoring plan.

Cash registration

The **Cash registration** role provides access to all visits within a **Care provider**.

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.

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.

Note that many units do not cash register visits in Clinic, in which case the cash registration role should never be used.

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.

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.

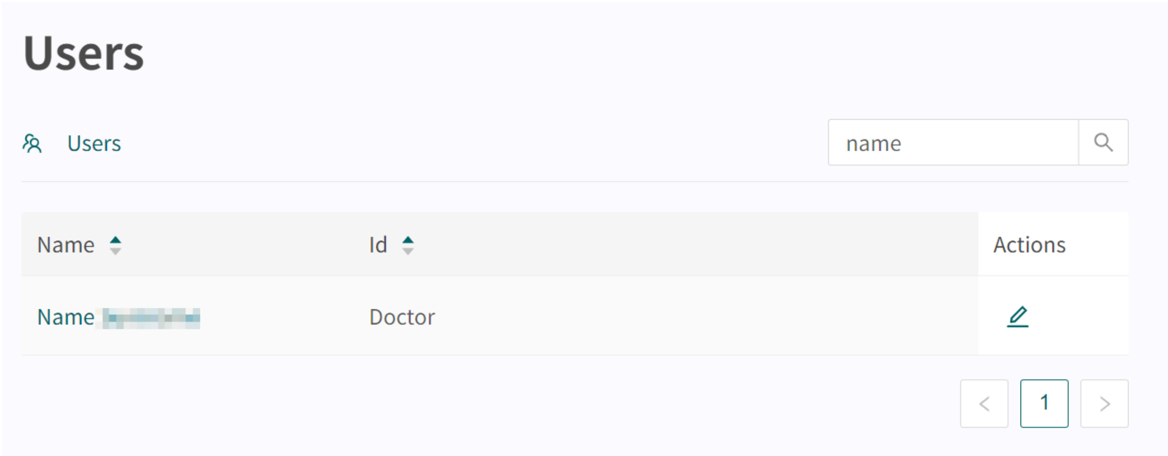
Schedule to

The **Schedule to** role makes it possible for the user to book appointments to the care unit specified in the **Care unit** field.

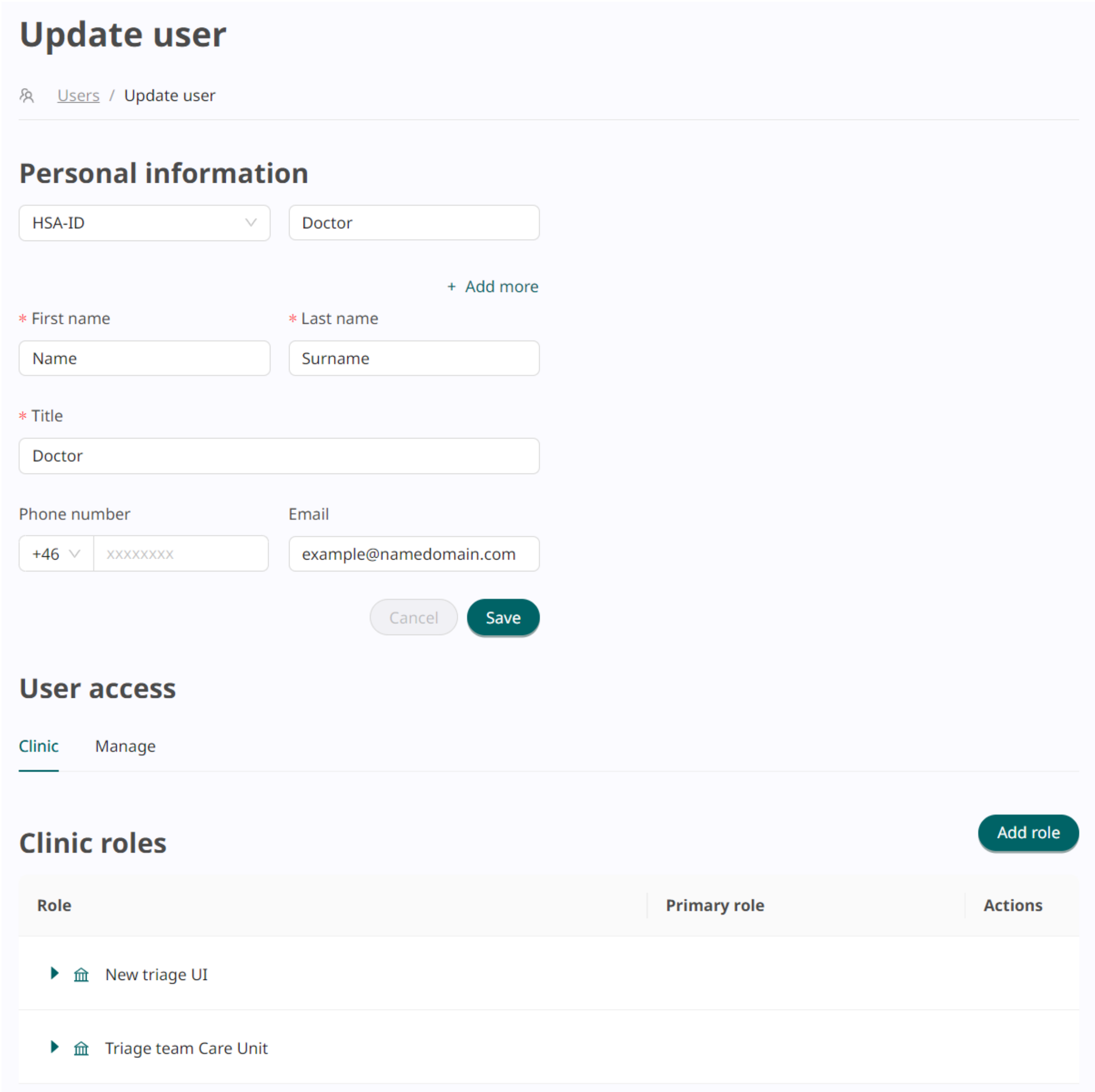
11.2.4. Assign an administrative role

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

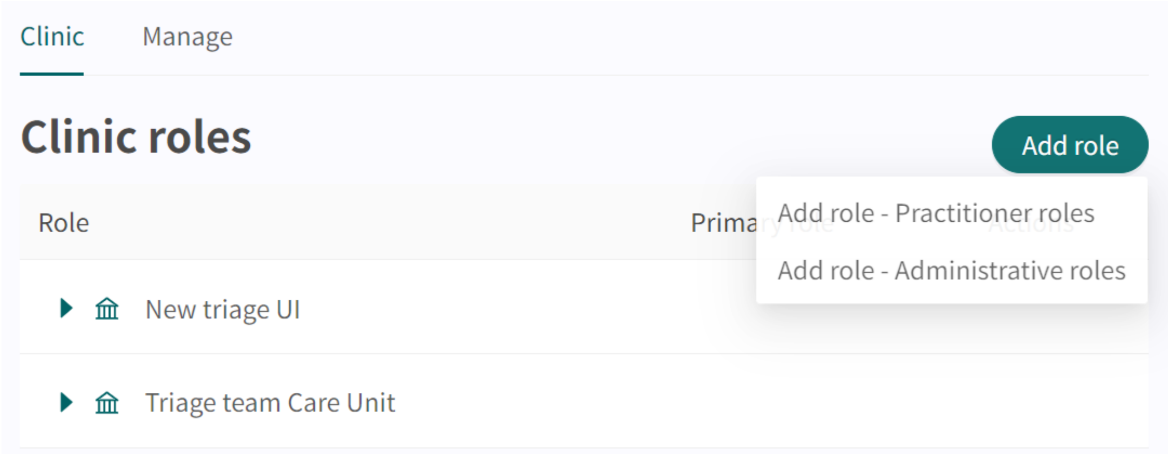
2. Search for the user in the search field and click on the user's name in the list.



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

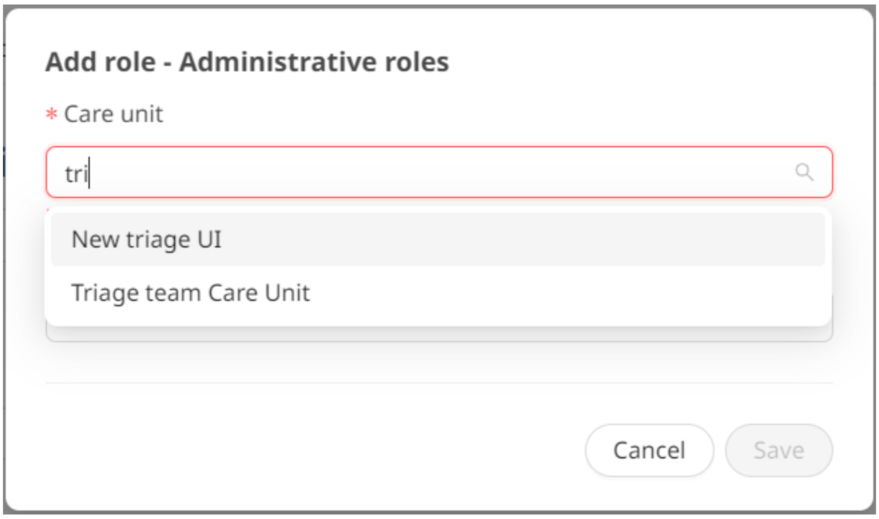


3. Make sure that the **Clinic** tab is selected. Click the **Add role** button and select the **Administrative roles** option.

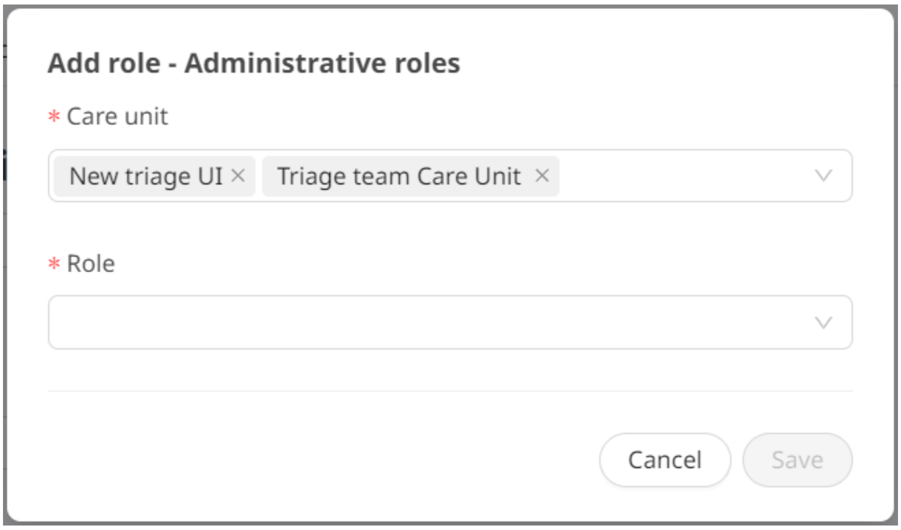


This opens the **Add role - Administrative roles** dialog.

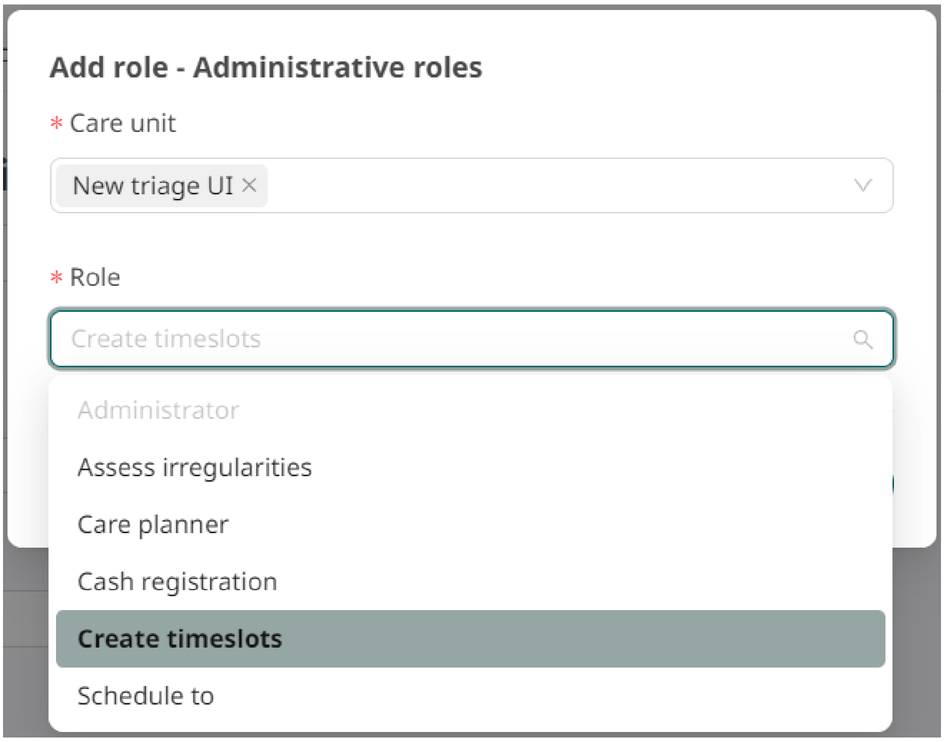
4. Select care unit:
   a. Click the **Care Unit** field.
   b. Select a **Care Unit** from the drop-down list.
   You can either scroll through the list or search for a care unit by typing in parts of the care unit name.



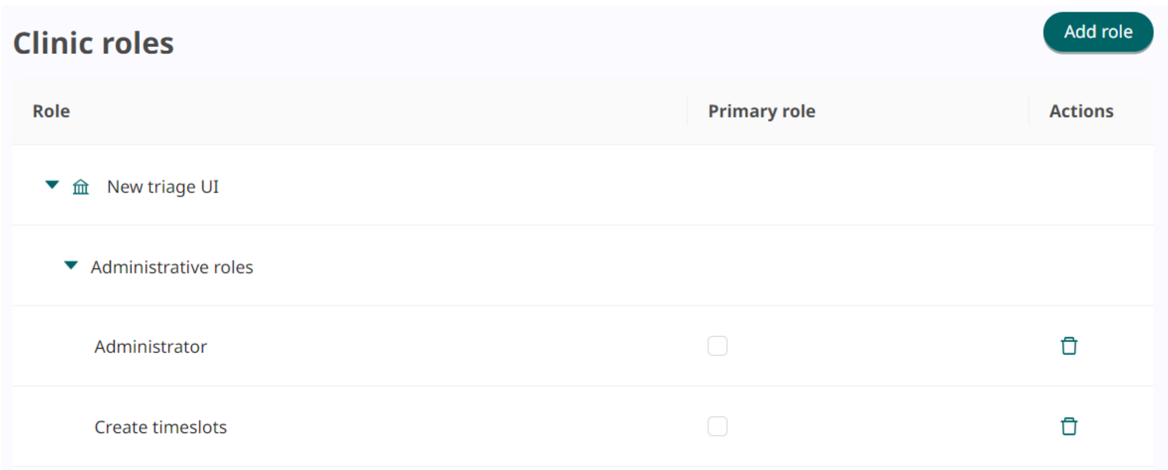
NOTE
If the user is to have the same role in more than one care unit, multiple care units can be selected at the same time.



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



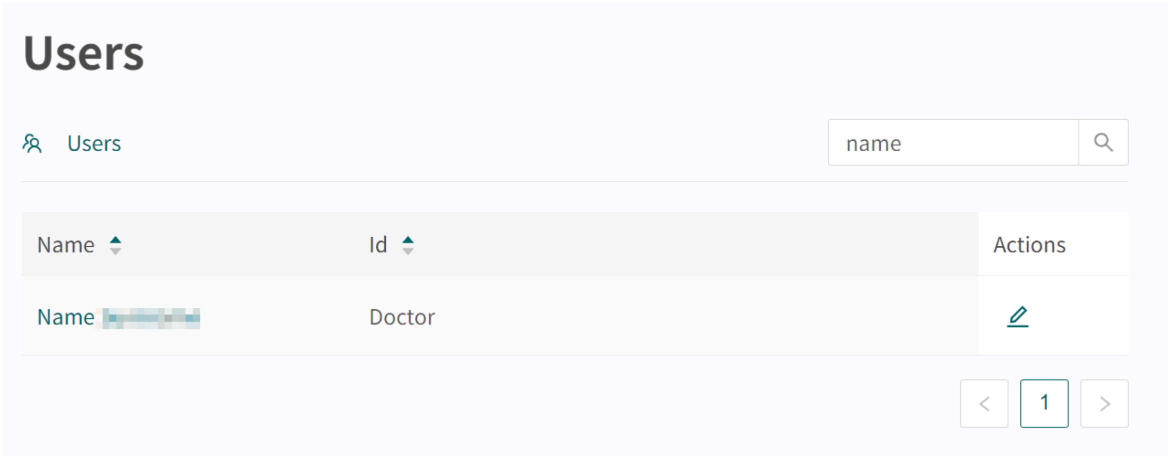
6. Click **Save**.
   The added roles for the selected care units will appear in the **Clinic roles** list.



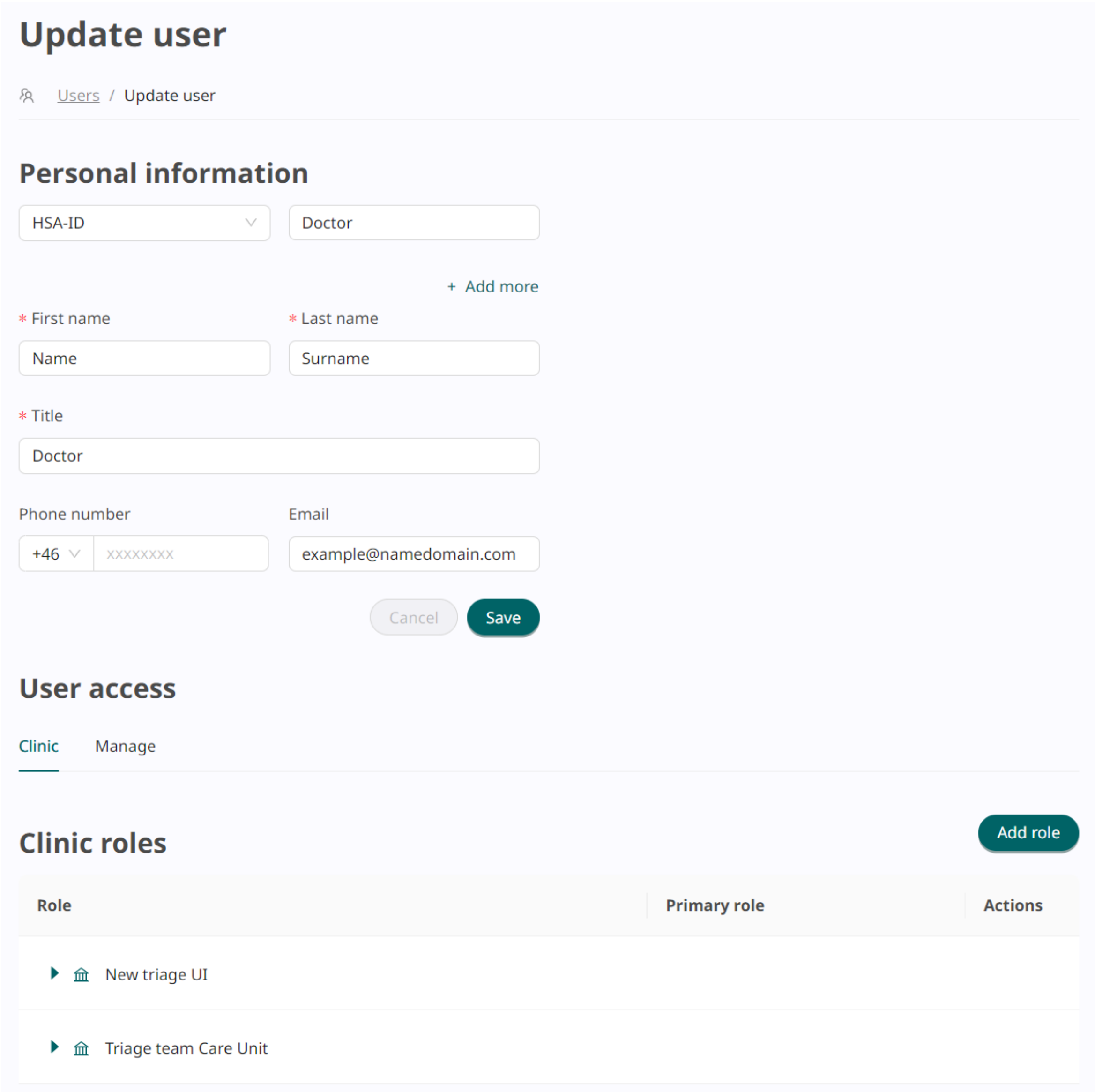
11.2.5. Updating a role to be primary for a user

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

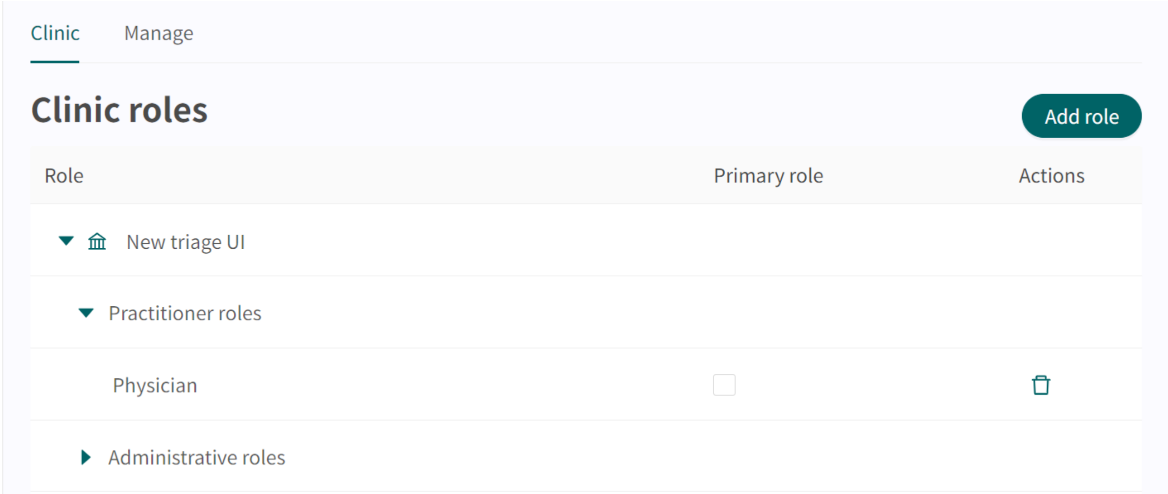
2. Search for the user in the search field and click on the user's name in the list.



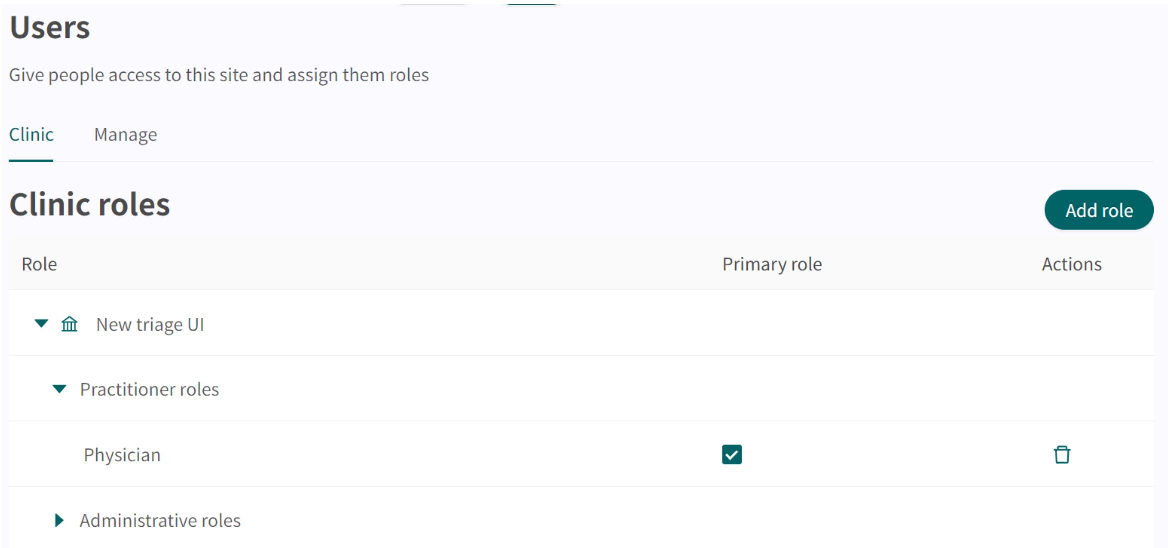
This will open the **Update user** view.



3. 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**).



4. Check the checkbox in the **Primary role** column. The update will be saved automatically.



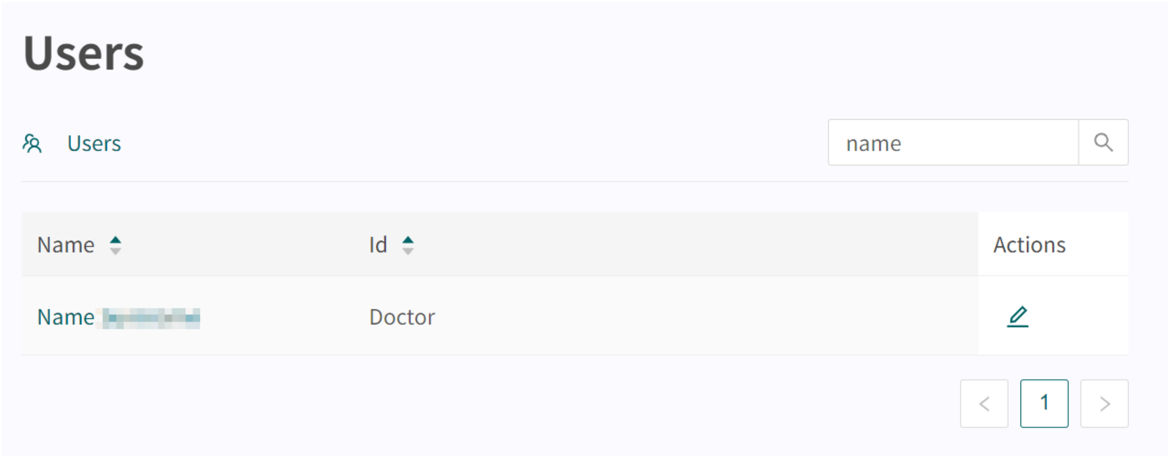
11.2.6. Remove roles for a user

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.

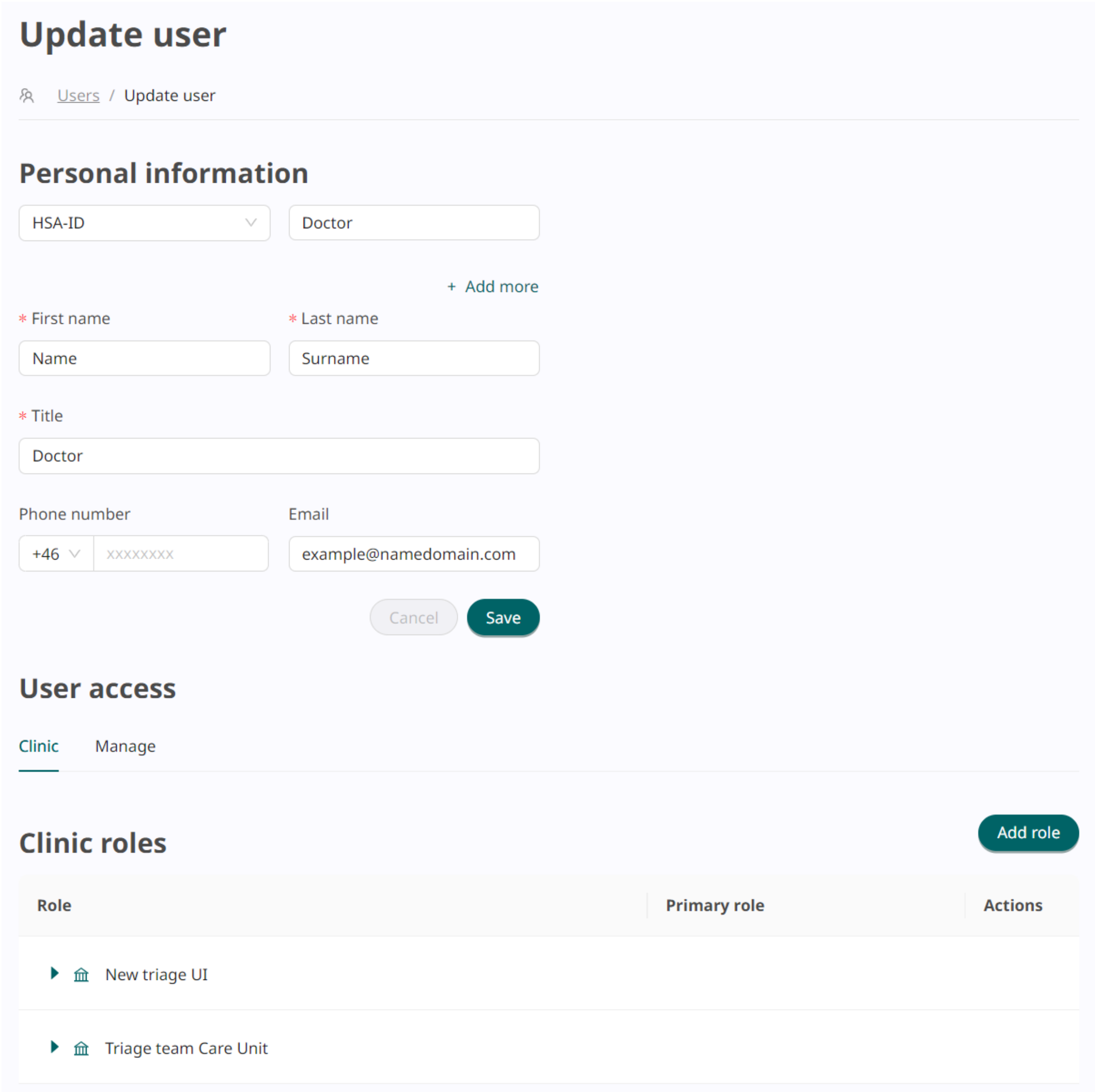
To remove roles for a user:

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

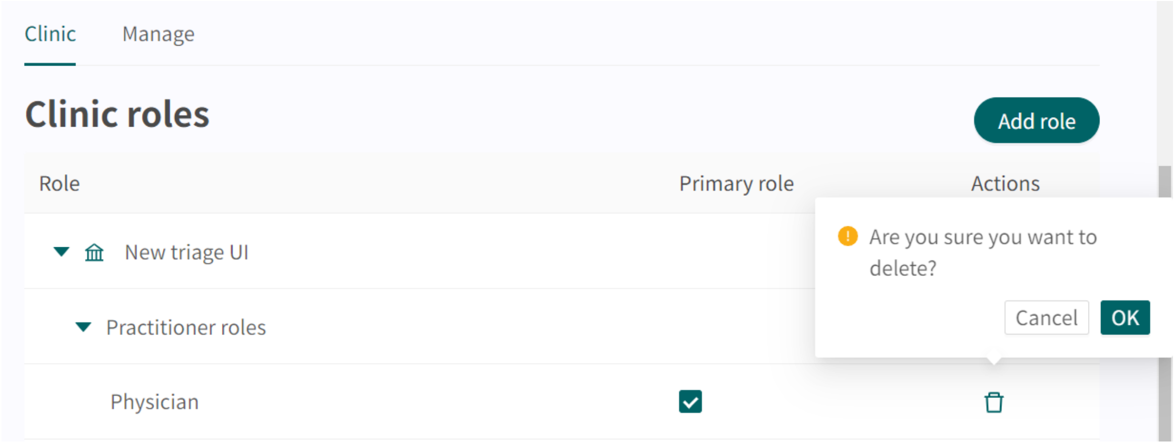
2. Search for the user in the search field and click on the user's name in the list.



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



3. Make sure that the **Clinic** tab is selected. Remove the desired roles by clicking the trash can icon in the **Actions** column for the respective roles.



4. Confirm the deletion by clicking **OK**.

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 a a Configuration administrator at the care unit to be able to handle the care unit's autophrases.

Some examples of possible autophrases:

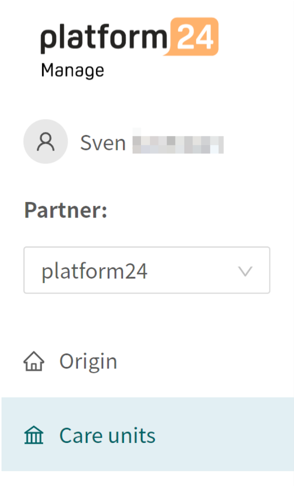
- **Will be sending an electronic prescription soon**
  I will shortly issue a prescription for you, when it is ready you will receive an SMS.
  The prescription is sent electronically and can be picked up at any pharmacy.
- **Blood pressure questions**
  Some blood pressure questions:
  1. When did 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:

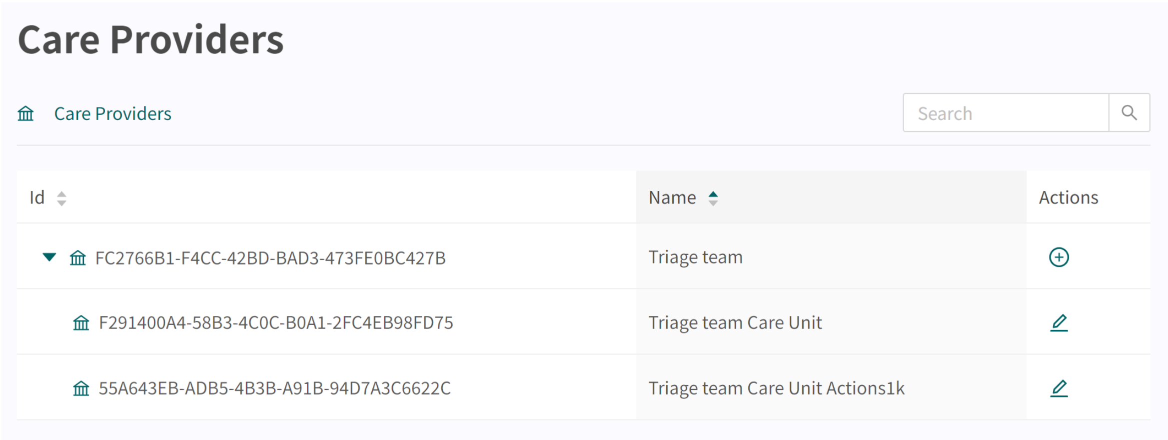
- Adding new phrases
- Editing existing phrases (removing or editing)

11.3.1. Adding new autophrases

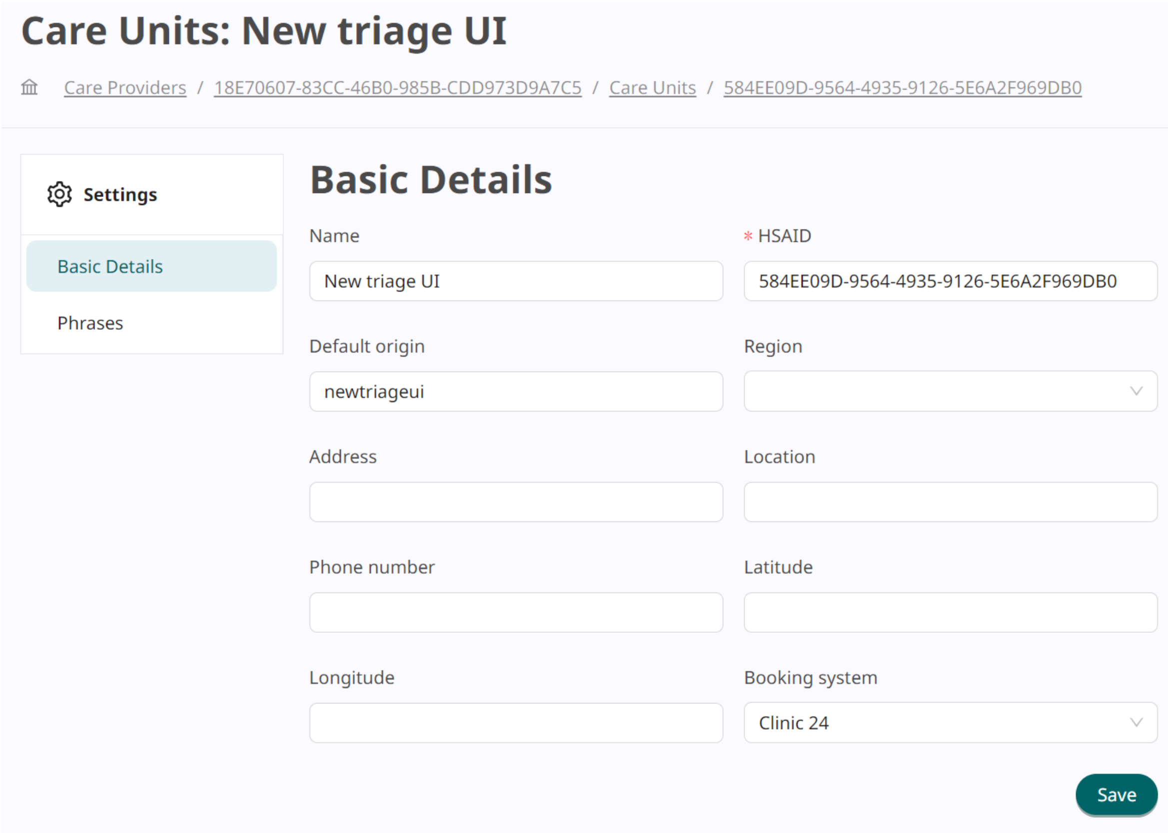
1. Make sure you have chosen the correct **Partner** by checking the name of the **Partner** in the dropdown list below your username in the top left corner.



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 care unit ID. 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.

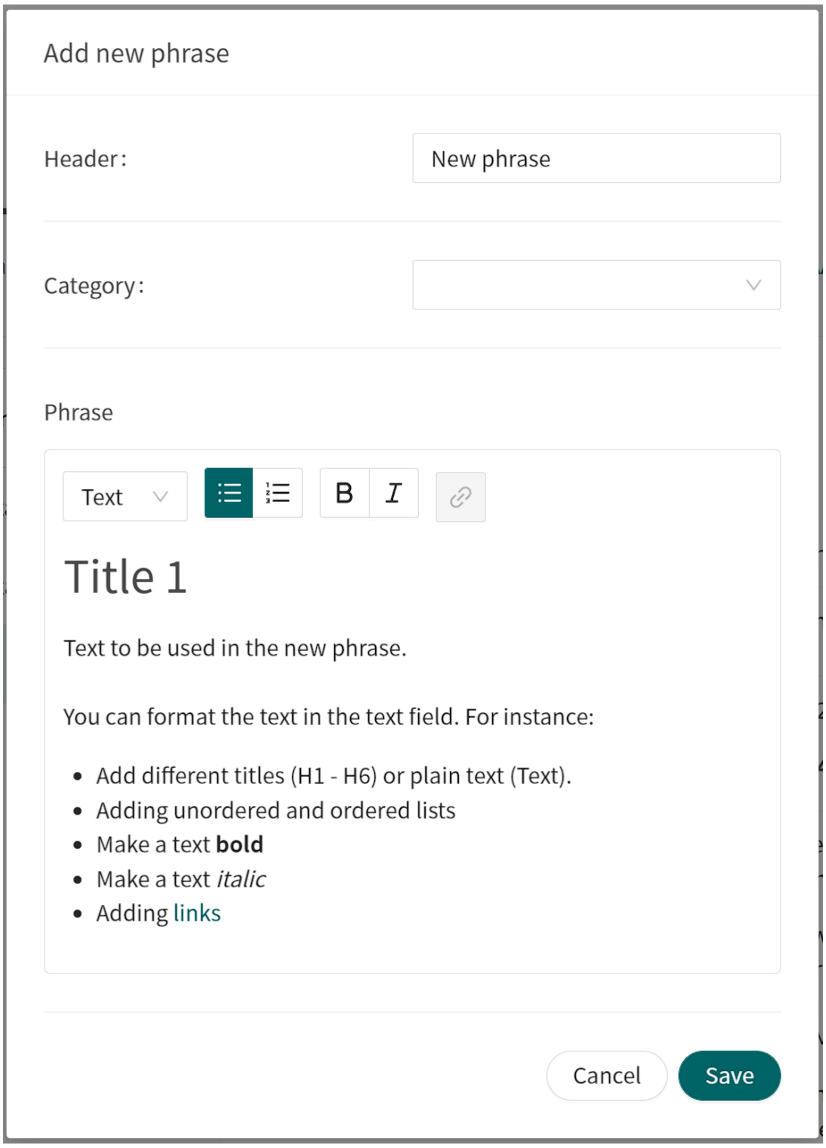


4. Click the pen icon in the **Actions** column on the row belonging to the care unit in question. This will open up the **Settings** menu for the care unit displaying the **Basic Details**.



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.

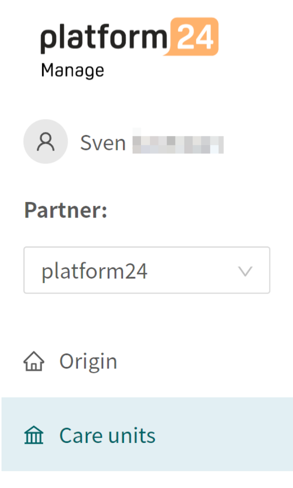
7. Add your phrase in the **Add new phrase** window.
   The **Header** and **Phrase** fields are mandatory while **Category** is optional. If the **Care unit** has many phrases, specifying a **Category** makes it easier for the user.



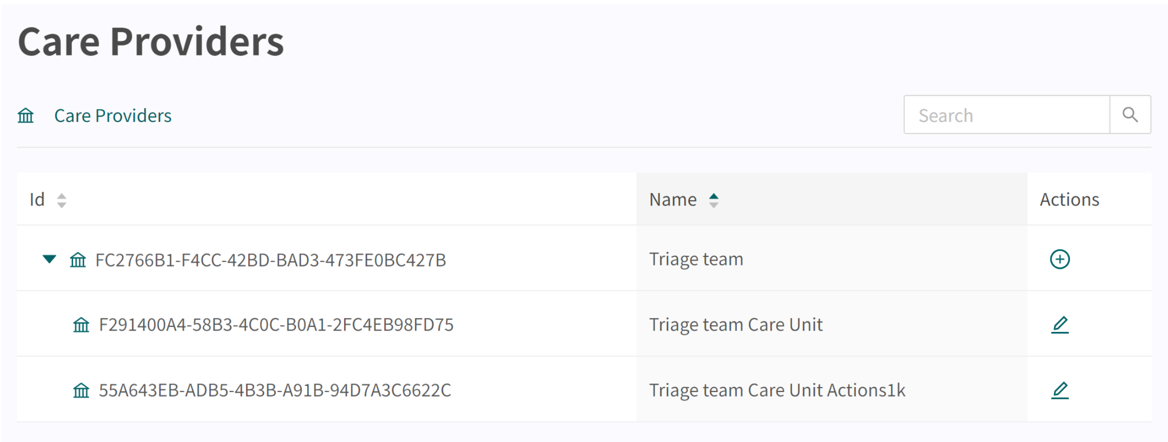
8. Click on the **Save** button to save your phrase.
   The phrase will be shown in the **Phrases** list.

11.3.2. Editing and deleting autophrases

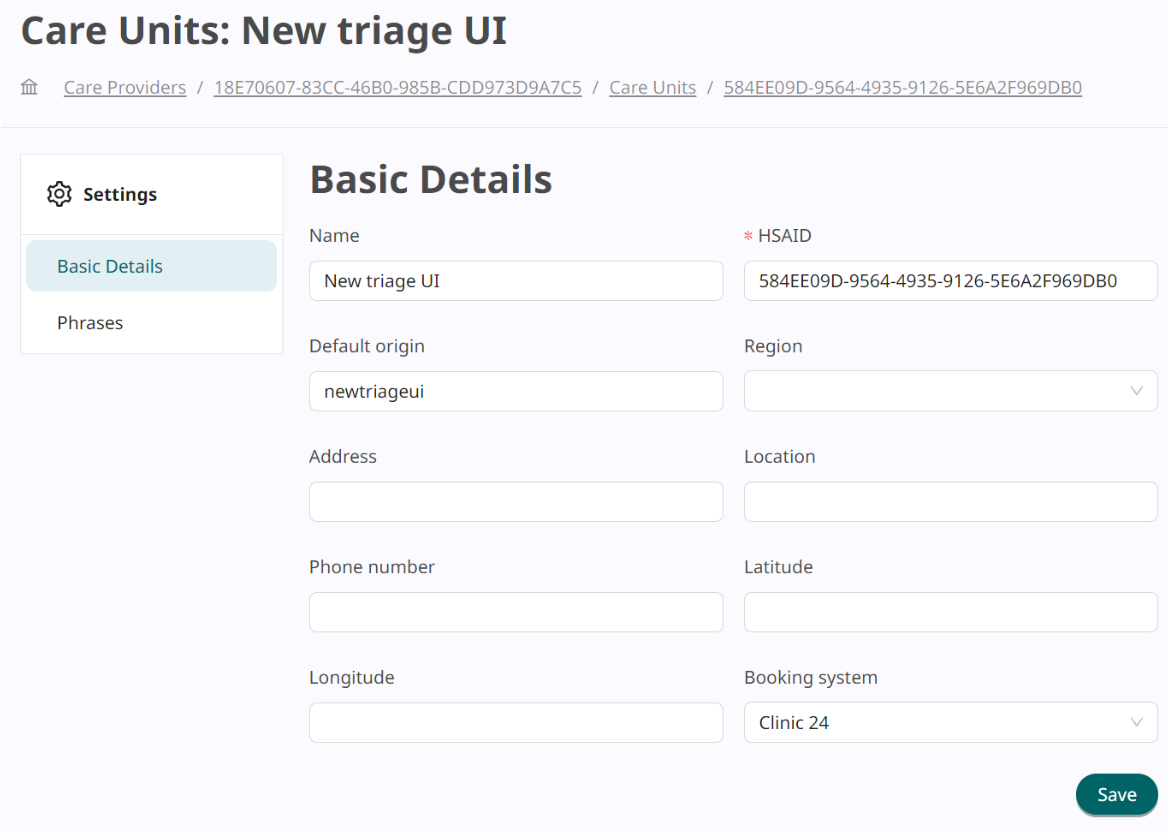
1. Make sure you have chosen the correct **Partner** by checking the name of the **Partner** in the dropdown list below your username in the top left corner.



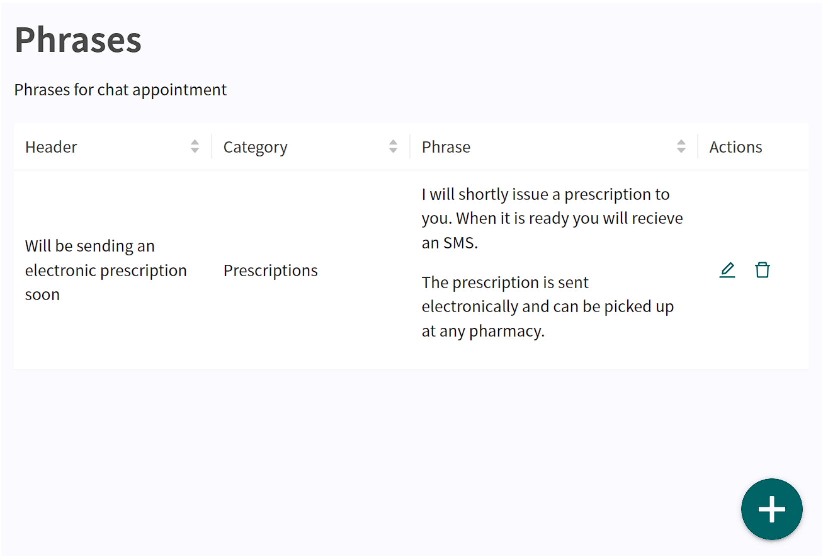
2. Click on the **Care units** menu item in the main menu.
3. Click on the green arrow ▸ to the left of the care unit you wish to edit. It is the small green arrow to the left of the care unit ID. This will expand the list of care units in the list. It will show one or more care units in your list. How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



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**.



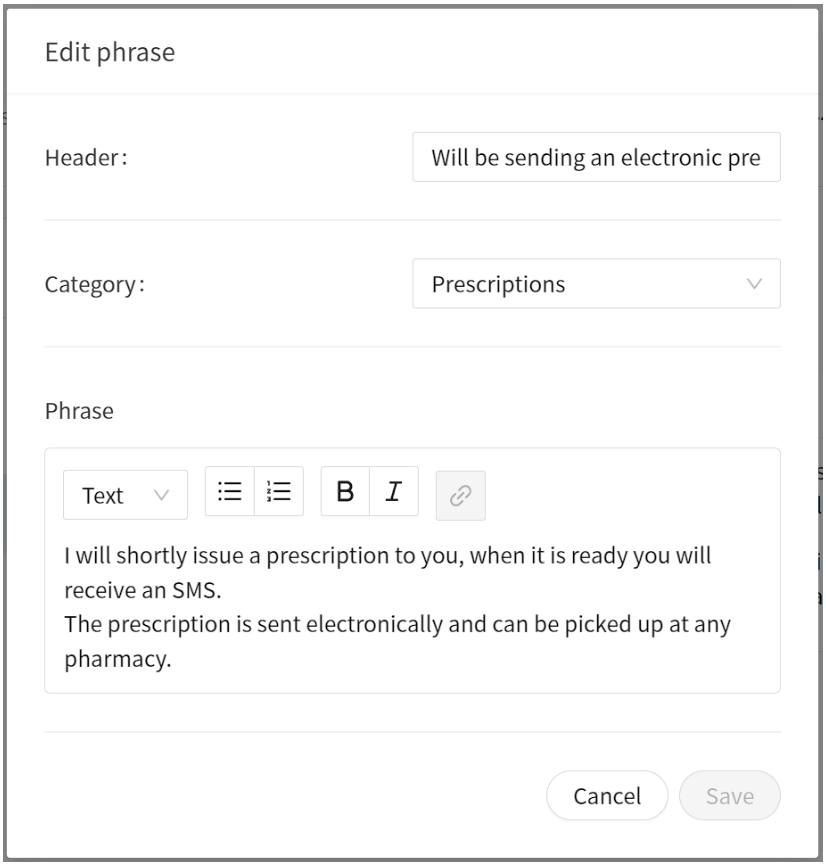
5. Click on the **Phrases** item in the **Settings** menu to open the **Phrases** view.



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.

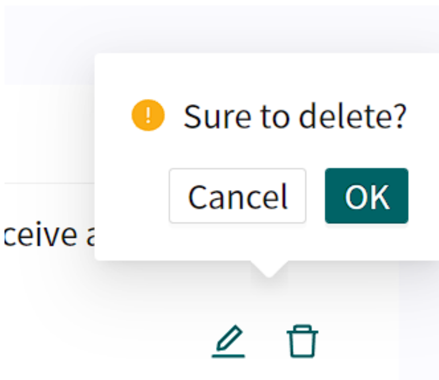
a. Make the needed changes to the phrase.
The **Header** and **Phrase** fields are mandatory while **Category** is optional. If the **Care unit** has many phrases, specifying a **Category** makes it easier for the user.



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: • 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: • 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 Log in to Manage*. • 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	Main updates are: • 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 What is Manage* moved in as a section in Chapter *6 About Manage*. • Chapter 6 renamed. Information from Chapter 6 moved in to new section *6.1 Main menu* 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 Add a new user*: 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 Add a practitioner role*, *11.2.4, Add an administrative role*, *11.2.5 Updating a role to be primary for a user*, *11.2.6 Remove roles for a user* updated to describe the new way of adding and editing roles in Clinic. • Previous section *11.2.5 Administrative roles* removed as this information already is included in the new instructions in Chapter 12.

#	Date	Description
8.0	2024-08-15	Main updates are: • Wording in the manual changed to be applicable for all markets. For example, HSA-ID and Swedish personal ID was replaced with "ID used for login". • In Chapter *3. Symbols definition*, the previous warning symbol has been replaced with a caution symbol indicating to the users to consult the instructions for use for relevant warnings and cautions. • Section *5.4. Log in to Manage* updated to be more generic. Also, duplicate information about the demo and production environments removed (already present in section *5.3.1. Platform24 environments*). • Section *6.1 Main menu* updated with the name change of the menu item from Practitioners to Users. Links to referred chapters regarding users also updated. • Chapter *7. Configurations and settings for Origins in the Patient app* has been updated. New images and removed sections regarding items in the Settings menu (that were not used). In the Basic details section, Country Code, Domain and URL Suffix was removed. • New sections: *7.2.4. Shut down patient origin* and *11.1.1. Appoint an administrator for the care provider*. • Chapter *8. Configurations and settings for care units in Clinic* has been updated. New image and a removed section regarding the Customizations item in the Settings menu (that was not used). The Customizations item was also removed in the images in section *11.3.2. Editing and deleting autophrases.* • Chapter *10 Administering roles and authorizations for Manage* rewritten to describe the new way of adding and editing Manage roles. • First paragraph in section *11.1.4. Before training and go-live* updated with that required authorizations should be added to the Clinic users. • Images and text in section *11.2. Adding authorizations* updated to reflect the changes in the user interface such as for example updated names of dialogs. • Last step in section *11.2.2. Add a practitioner role* and *11.2.4. Add an administrative role* updated. • In section *11.2.3. Administrative roles*, the new role "Care planner" was added. A clarification was also added to the Administrator role (that this role is to be phased out). • Note in section *11.3. Autophrases* updated to reflect the new roles.

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.