



ENGLISH

platform²⁴

USER MANUAL – MANAGE

MANAGE v3.112

Manual version 8.0
2024-08-15



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

8.0

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	12
6. Working in Manage	13
6.1. Main menu	13
6.2. Change management and tracking	14
6.3. Sending changes for review to Production	15
7. Configurations and settings for Origins in the Patient app	18
7.1. Adding a new Patient app/origin	18
7.2. Editing a Patient app/origin	19
7.2.1. Basic details	20
7.2.2. Alerts	21
7.2.3. Text content	21
7.2.4. Shut down patient origin	23
7.2.5. Toplist	24
7.2.6. Rules	26
8. Configurations and settings for care units in Clinic	31
8.1. Basic details	32
8.2. Phrases	33
9. Administering users in Platform24	34
9.1. Add a new user	34
10. Administering roles and authorizations for Manage	38
10.1. Available Manage roles	38
10.2. Assign a Manage role	38
11. Administering roles and authorizations for Clinic	43
11.1. Preparations	43
11.1.1. Appoint an administrator for the care provider	43
11.1.2. Appoint an administrator for the care unit	43
11.1.3. Inform Platform24 about the appointed administrator	43
11.1.4. Before training and go-live	43
11.1.5. Booking tickets for other care units	44
11.1.6. Authorizations for booking to another care unit	44
11.2. Adding authorizations	44
11.2.1. Practitioner roles	45
11.2.2. Assign a practitioner role	45
11.2.3. Administrative roles	49
11.2.4. Assign an administrative role	50
11.2.5. Updating a role to be primary for a user	54
11.2.6. Remove roles for a user	56

11.3. Autophrases	58
11.3.1. Adding new autophrases	59
11.3.2. Editing and deleting autophrases	62
12. Versions	65
13. References	68

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 \[68\]](#)).

The screenshot displays the Platform24 Manage application interface. On the left is a sidebar menu with the following items: 'platform24 Manage' (with a user 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, 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

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.

 English 

 About

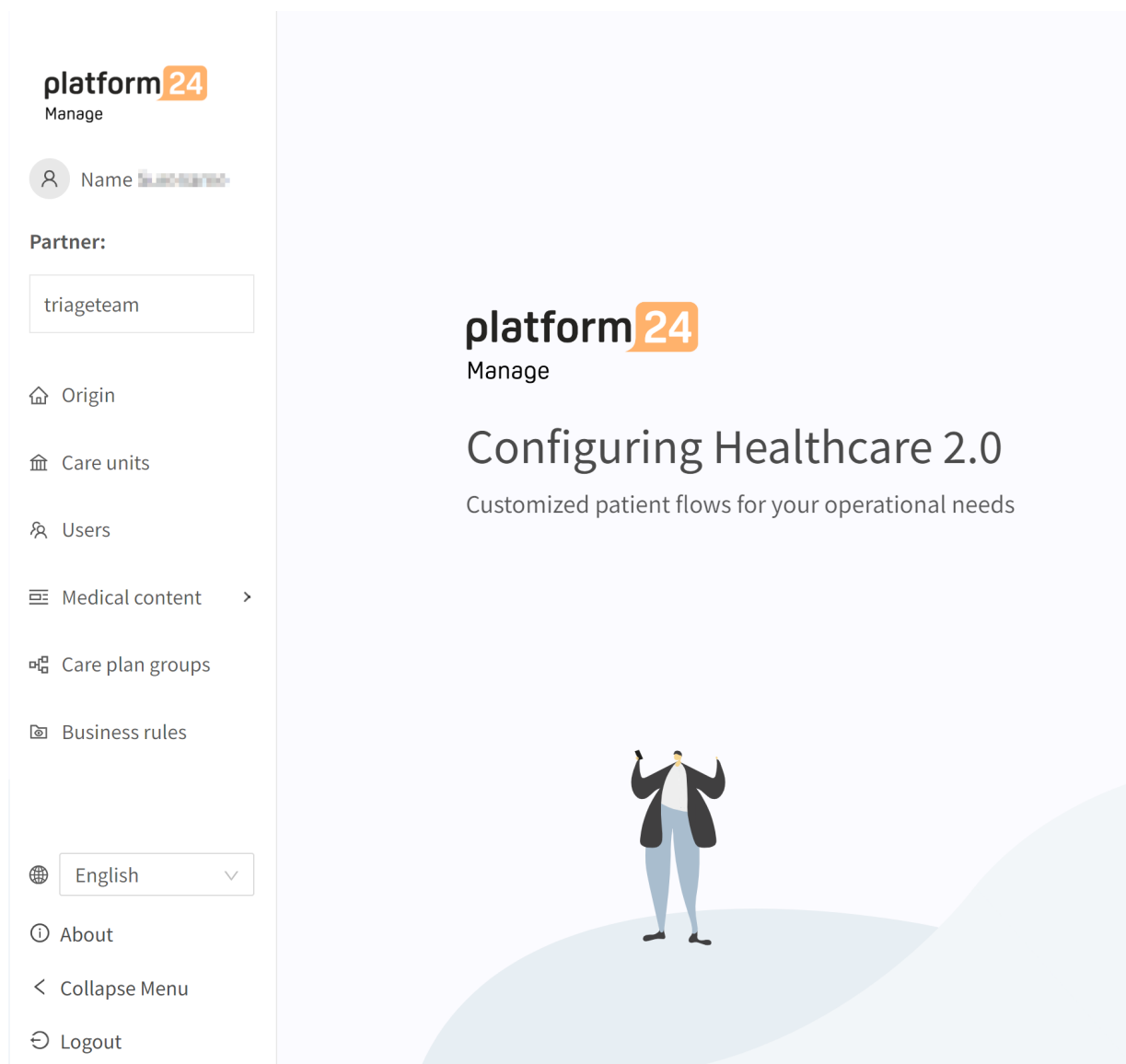
< Collapse Menu

 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 \[18\]](#) 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.

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

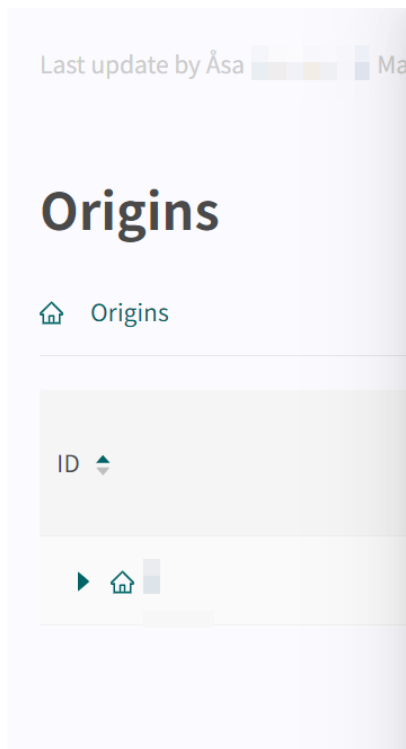
Merge branch 'master' into partner
May 23, 2023 08:23 AM | Åsa | Passed

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.

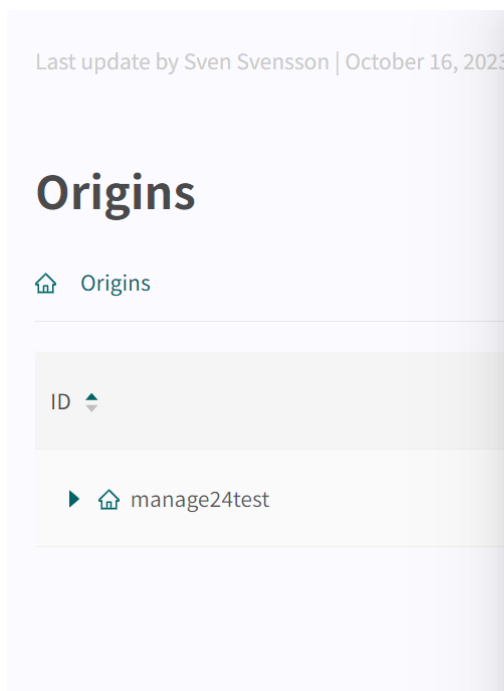


X

🕒 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
to false		
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.



X

🕒 Log History 📦 Changes 99+

Send for review

Send to test environment

Changes

Statement YesNo of type QUESTION was updated in allQuestionTypes:

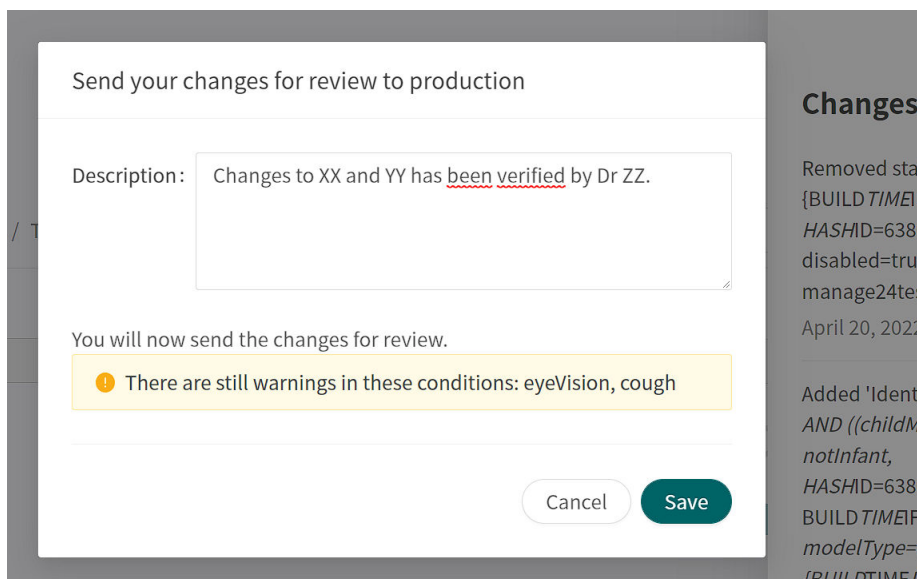
- points is updated. Skipped

October 16, 2023 11:44 AM | Sven Svensson

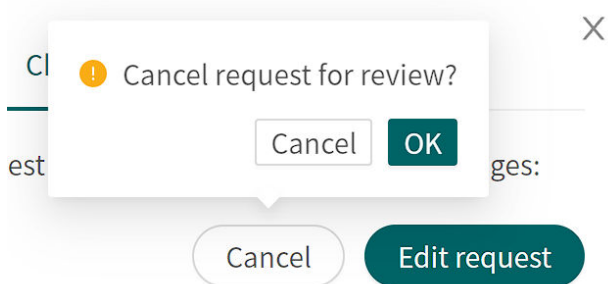
Statement Single of type QUESTION was updated in allQuestionTypes:

- * Skipped

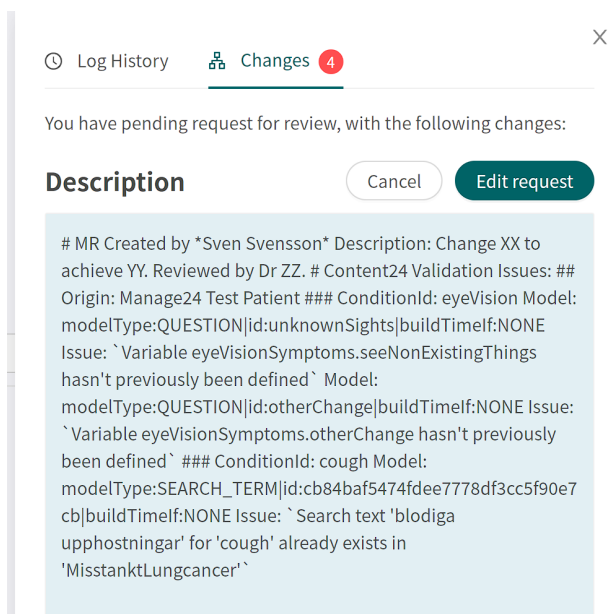
October 16, 2023 11:44 AM | Sven Svensson



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

Alerts

Text Content

Toplist

Shut down origin

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 data-bbox="517 1339 783 1368" type="text" value="Klarna"/>	<input type="text" value="support@triageteam24.se"/>

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.

Basic Details

* ID

Name towards patient	Name towards practitioners
<input style="width: 90%;" type="text" value="Triage team"/>	<input style="width: 90%;" type="text" value="Triage team"/>
BankID display name	SMS Sender
<input style="width: 90%;" type="text" value="Platform24"/>	<input style="width: 90%;" type="text" value="Triage team"/>
Payment Method	Email
<input style="border-bottom: 1px solid #ccc;" type="text" value="Klarna"/>	<input style="width: 90%;" type="text" value="support@triageteam24.se"/>

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.

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.

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.

7.2.3. 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

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**.

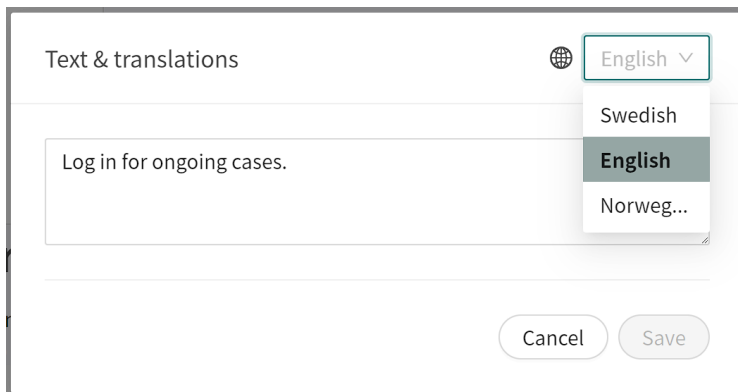
Deactivate app with message	False	patient-app	✎
Default language	sv	patient-app	✎
Default practitioner type nurse	False	rule	✎

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**.



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	✎

7.2.4. 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.

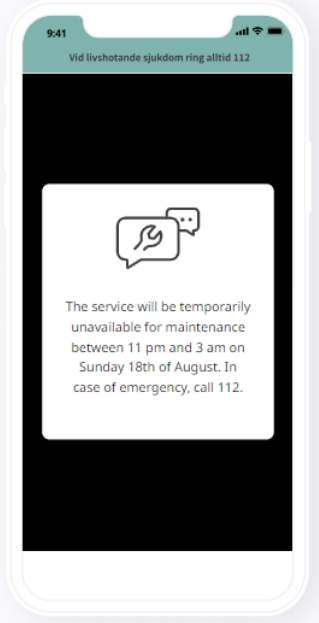
Shut down patient origin

Shutdown

Svenska **English** Dansk

The service will be temporarily unavailable for maintenance between 11 pm and 3 am on Sunday 18th of August. In case of emergency, call 112.

Save



7.2.5. Toplist

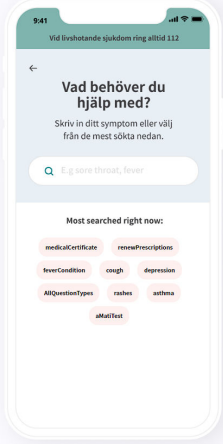
The **Toplist** defines the list of common search terms that can be seen in the Patient app if the partner has chosen to have a flow where patients themselves can search for the correct triage questionnaire.

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: Förfnya 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-newtriage	Swedish: Alla frågetyper English: All question types Norwegian:	


Swedish: Utsläp

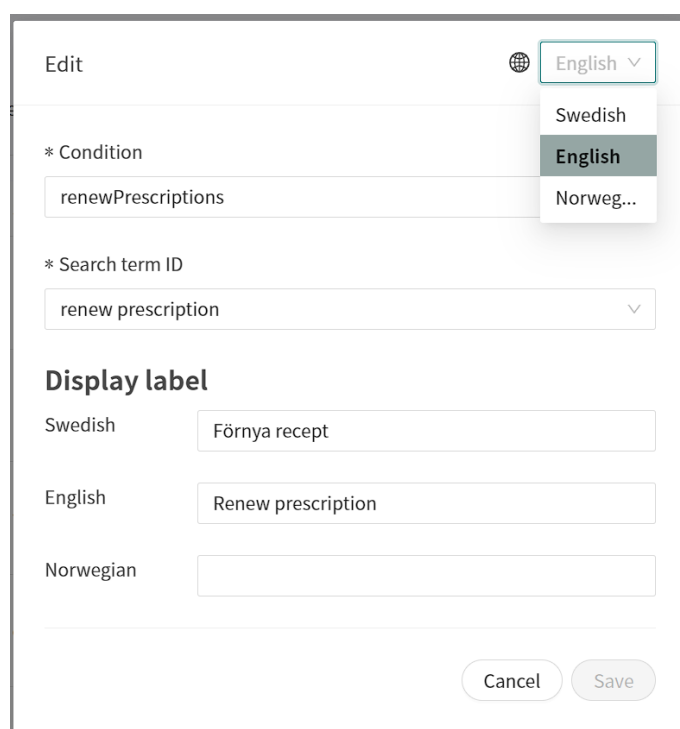


It is possible to edit the **Toplist** with the search terms that the partner wants, perhaps based on the season or focus of the organization.



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 two required fields: '* Condition' with the value 'renewPrescriptions' and '* Search term ID' with the value 'renew prescription'. Under the heading 'Display label', there are three input fields for different languages: Swedish (Förnya recept), English (Renew prescription), and Norwegian (empty). At the bottom right, 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.

7.2.6. Rules

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

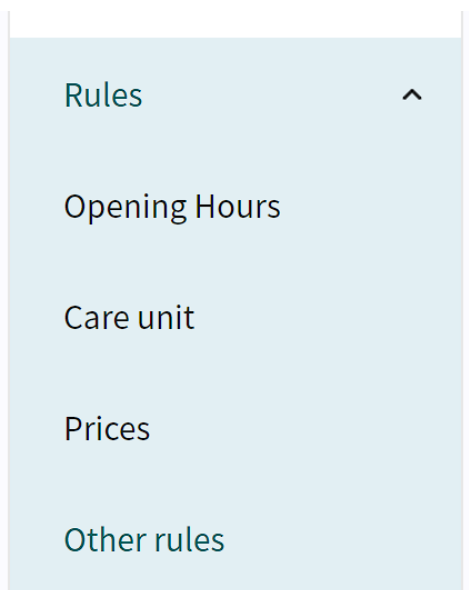



NOTE




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	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	
m24_test09	careUnitRule ▾	12000	<div style="border: 1px solid #ccc; padding: 2px;"> English ▾ Swedish English Norweg... </div>

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: New triage UI

[Home](#) / [Care Providers](#) / [18E70607-83CC-46B0-985B-CDD973D9A7C5](#) / [Care Units](#) / [584EE09D-9564-4935-9126-5E6A2F969DB0](#)

Settings

Basic Details

Phrases

Basic Details

Name	* HSAID
<input type="text" value="New triage UI"/>	<input type="text" value="584EE09D-9564-4935-9126-5E6A2F969DB0"/>
Default origin	Region
<input type="text" value="newtriageui"/>	<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

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.


platform24
Manage

 Name

Partner:


 Origin

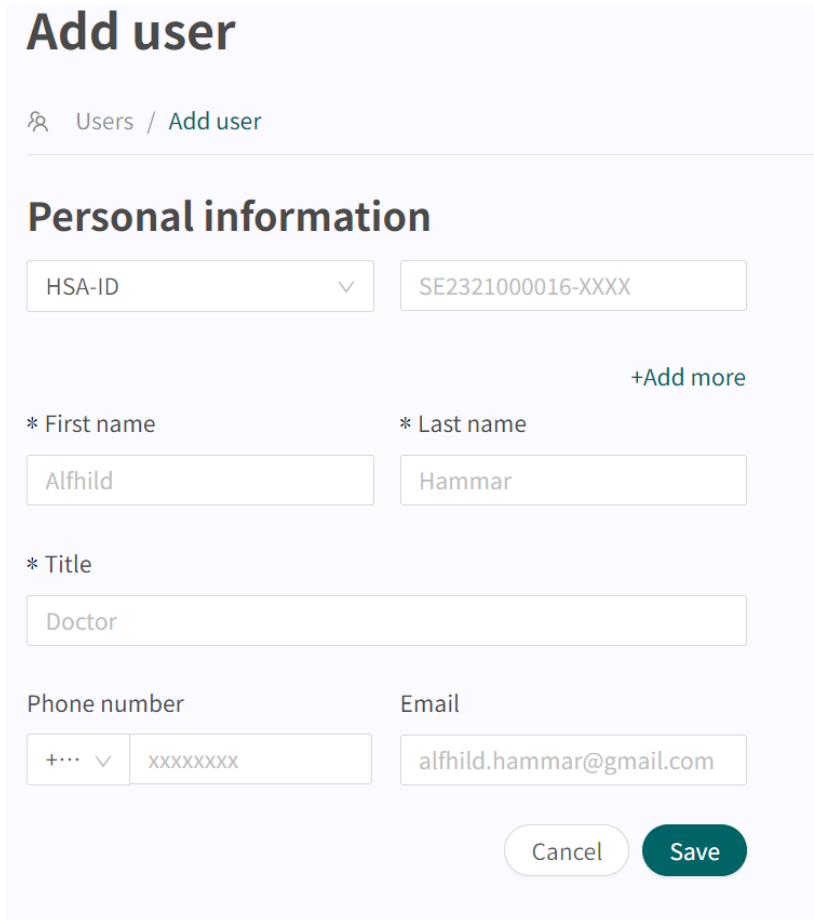
 Care units

 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

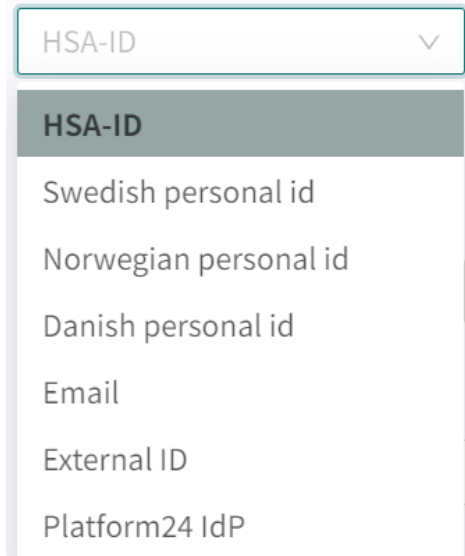
HSA-ID +Add more

* First name * Last name

* Title

Phone number Email

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

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.

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

User access

Clinic Manage

Clinic roles

Role	Primary role	Actions
▶ 🏠 New triage UI		
▶ 🏠 Triage team Care Unit		

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

Clinic Manage

Manage roles

Access type	Role	Actions
▶ 🏠 triageteam		<input type="button" value="🗑"/>

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

Add Manage role

* Partner
newtriageui

* Access type
Care Unit

* Care provider
newtriageui

* Care unit
New triage UI

* Role
Configuration administrator

Cancel Save

- 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.

Add Manage role

* Partner

newtrriageui

* Access type

Origin

* Origin

NewtrriageUI

* Role

Medical content viewer

Cancel Save










- 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.

Clinic Manage

Manage roles Add role

Access type	Role	Actions
▼  triageteam		
▶ Origin		
▼  newtriageui		
▼ Origin		
Origin: newtriageui	Care planner editor	
▼ Care provider: newtriageui		
Care unit: All	Configuration administrator	

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.

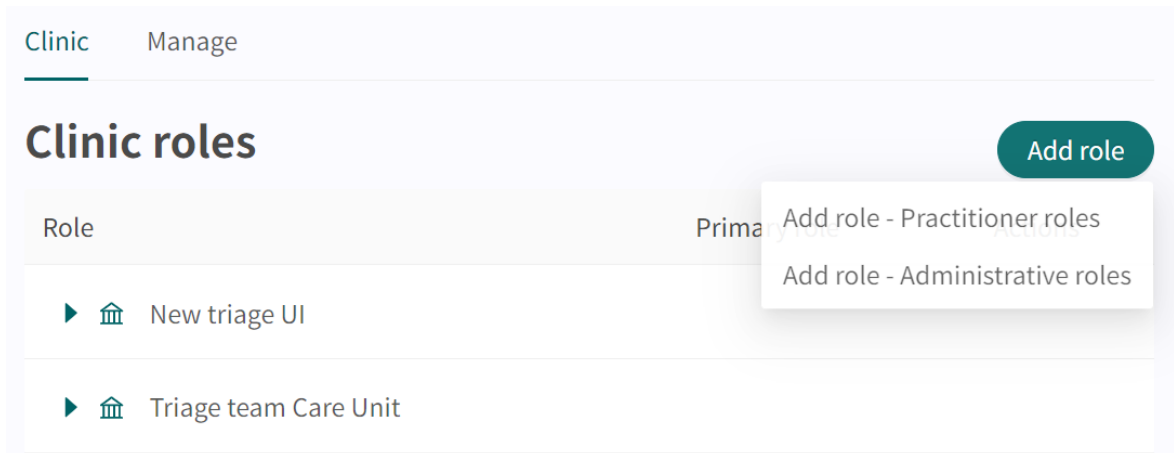
- 2. Search for the user in the search field and click on the user's name in the list.

The screenshot shows the 'Users' management page. At the top left is the title 'Users' and a breadcrumb 'Users'. To the right is a search bar with the text 'name' and a search icon. Below this is a table with three columns: 'Name', 'Id', and 'Actions'. The first row contains 'Name [redacted]', 'Doctor', and an edit icon. At the bottom right of the table are navigation buttons: '<', '1', and '>'.

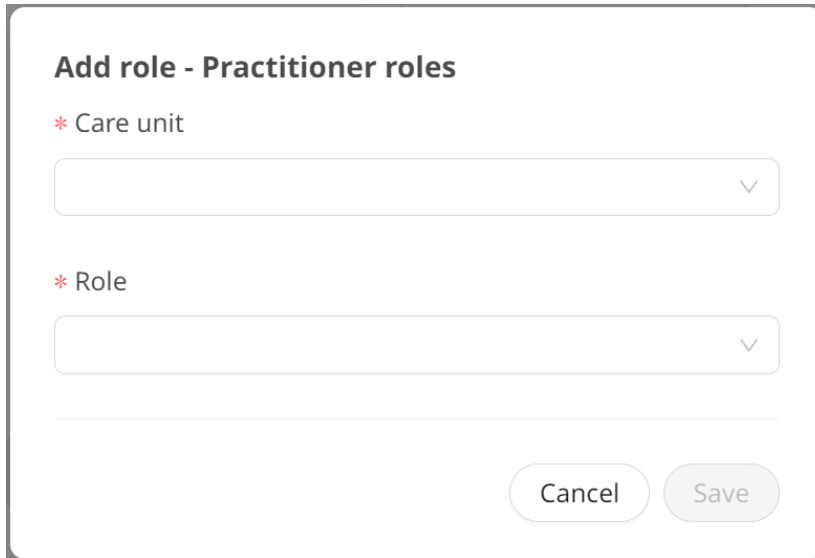
This will open the **Update user** view.

The screenshot shows the 'Update user' form. The title is 'Update user' with a breadcrumb 'Users / Update user'. The form is divided into sections: 'Personal information' and 'User access'.
The 'Personal information' section contains:
- HSA-ID dropdown (value: Doctor)
- First name field (value: Name)
- Last name field (value: Surname)
- Title field (value: Doctor)
- Phone number field (value: +46 xxxxxxxx)
- Email field (value: example@namedomain.com)
Buttons for 'Cancel' and 'Save' are at the bottom.
The 'User access' section has a breadcrumb 'Clinic Manage' and a table titled 'Clinic roles'. The table has columns 'Role', 'Primary role', and 'Actions'. It lists two roles: 'New triage UI' and 'Triage team Care Unit'. An 'Add role' button is in the top right corner.

- 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.

The screenshot shows a form titled "Add role - Practitioner roles". Under the heading "* Care unit", there is a search input field containing the text "ci". Below the input field, a dropdown menu is open, displaying two search results: "Ciam careunit, CIAM tp2 care provider 1" and "Ciam careunit 2, CIAM tp2 care provider 1". At the bottom right of the form, there are two buttons: "Cancel" and "Save".

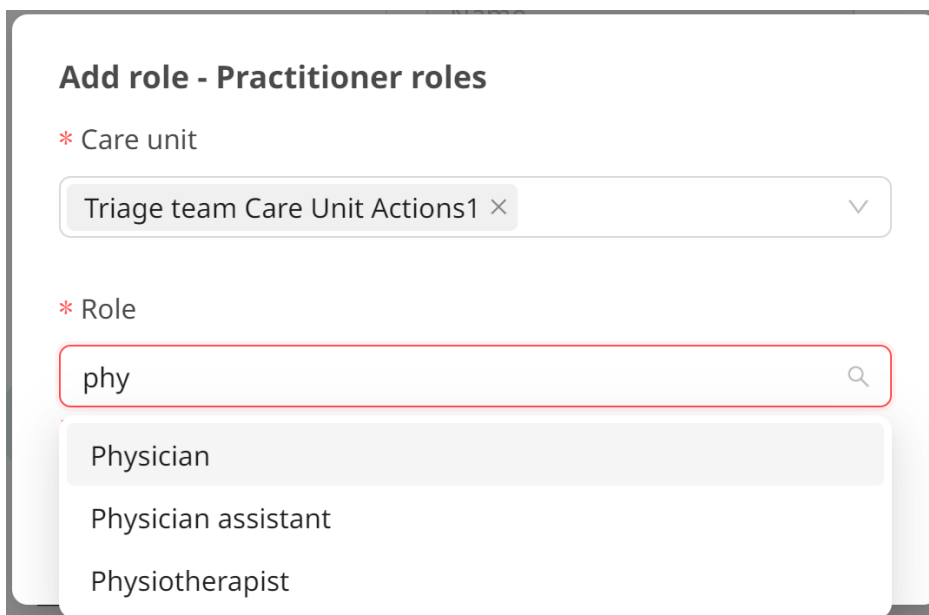


NOTE

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 form titled "Add role - Practitioner roles". Under the heading "* Care unit", there is a multi-select dropdown menu containing two selected items: "Ciam careunit, CIAM tp2 care provider 1" and "Ciam careunit 2, CIAM tp2 care provider 1". Below this, under the heading "* Role", there is a dropdown menu with "Nurse" selected. At the bottom right, the "Save" button is now highlighted in a dark teal color, while the "Cancel" button remains light gray.

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



Add role - Practitioner roles

* Care unit

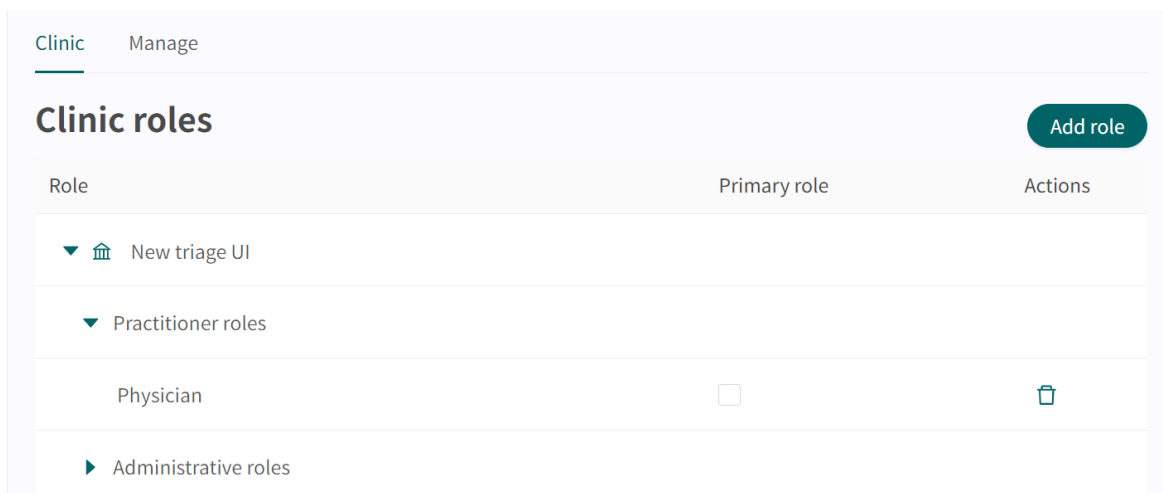
Triage team Care Unit Actions1 ×

* Role

phy

- Physician
- Physician assistant
- Physiotherapist

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



Clinic Manage

Clinic roles

Add role

Role	Primary role	Actions
▼ 🏠 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	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: <ul style="list-style-type: none"> • 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

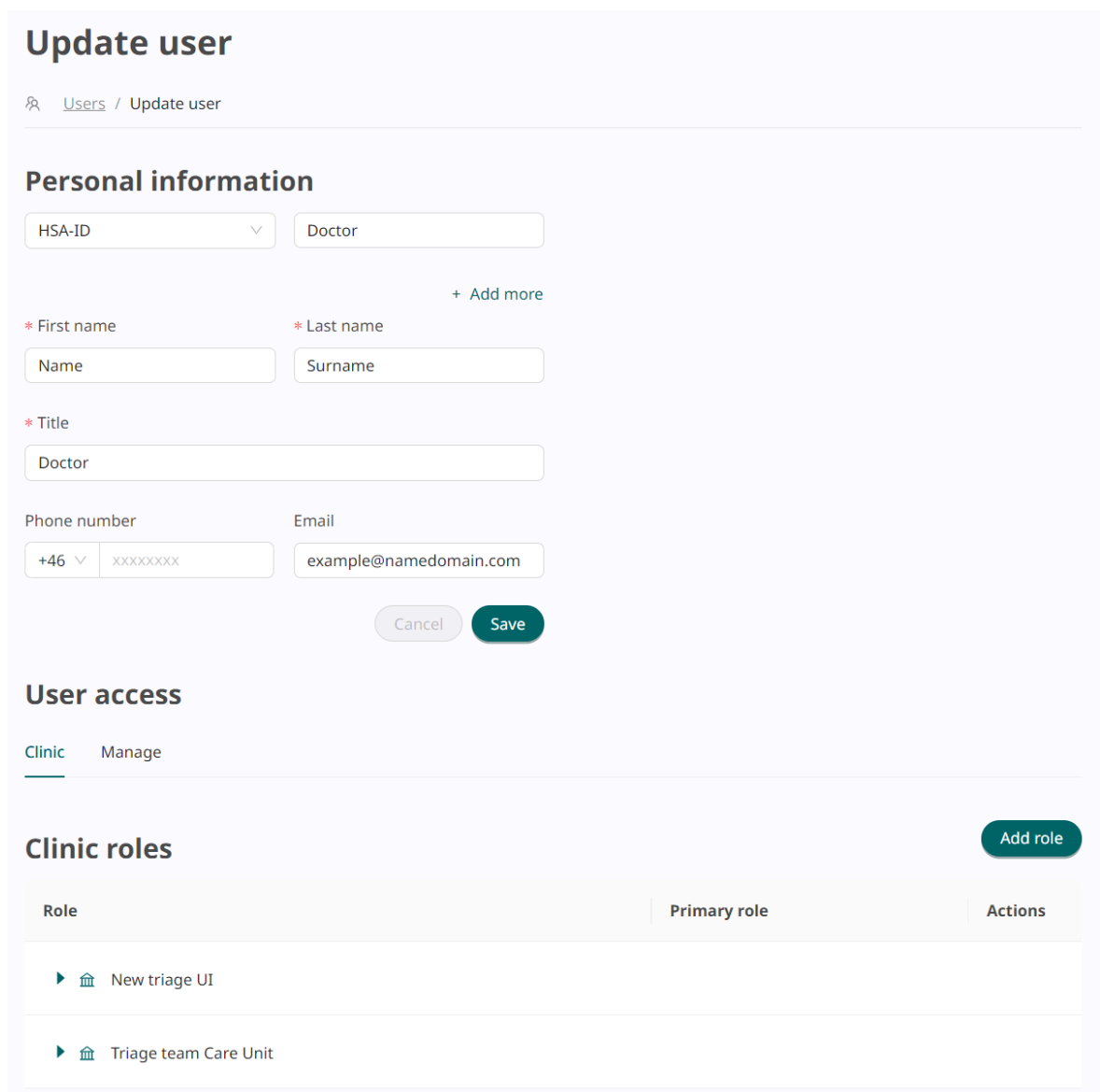
1. Go to the **Users** menu item in the main menu.

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



The screenshot shows the 'Users' management page. At the top left is the title 'Users'. Below it is a breadcrumb 'Users' and a search bar containing the text 'name'. Below the search bar is a table with three columns: 'Name', 'Id', and 'Actions'. The first row of the table has 'Name' with a blurred value, 'Id' with the value 'Doctor', and an 'Actions' column containing an edit icon. At the bottom right of the table are navigation buttons: '<', '1', and '>'.

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



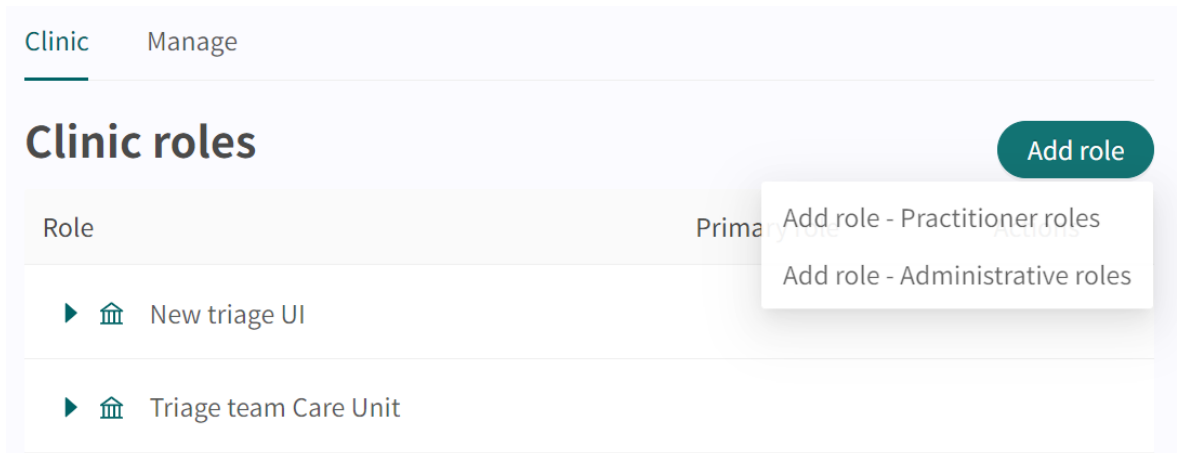
The screenshot shows the 'Update user' form. At the top is the title 'Update user' and a breadcrumb 'Users / Update user'. Below is the 'Personal information' section with the following fields:

- HSA-ID (dropdown menu)
- Doctor (text input)
- + Add more (link)
- * First name (text input)
- * Last name (text input)
- * Title (text input, value: Doctor)
- Phone number (text input, value: +46 xxxxxxxx)
- Email (text input, value: example@namedomain.com)

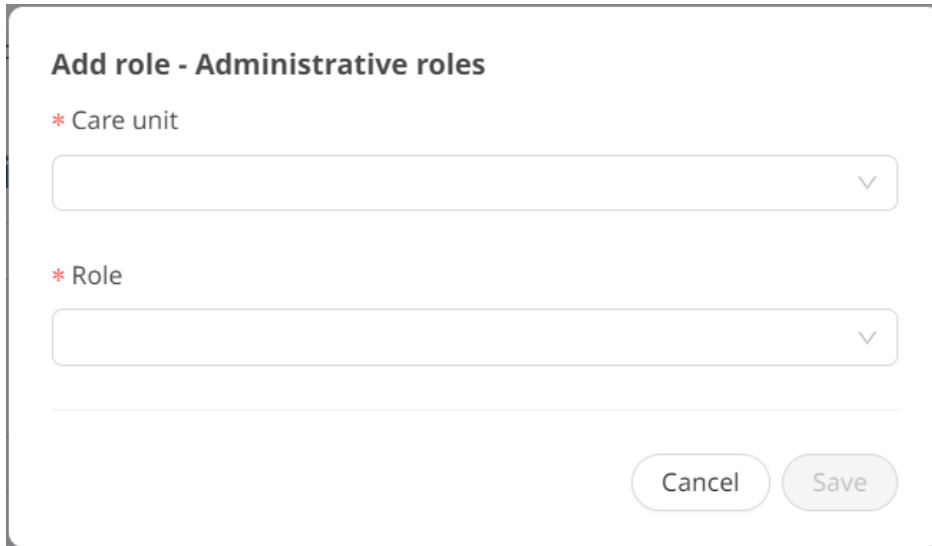
At the bottom of the form are 'Cancel' and 'Save' buttons. Below the form is the 'User access' section with a breadcrumb 'Clinic / Manage'. Underneath is the 'Clinic roles' section with an 'Add role' button. A table lists the roles:

Role	Primary role	Actions
▶ 🏠 New triage UI		
▶ 🏠 Triage team Care Unit		

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



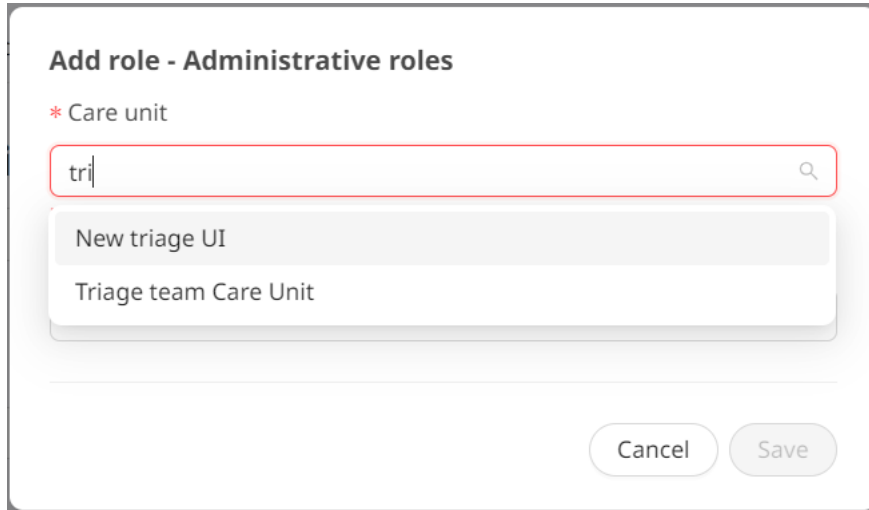
This opens the **Add role - Administrative roles** dialog.



4. Select care unit:

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

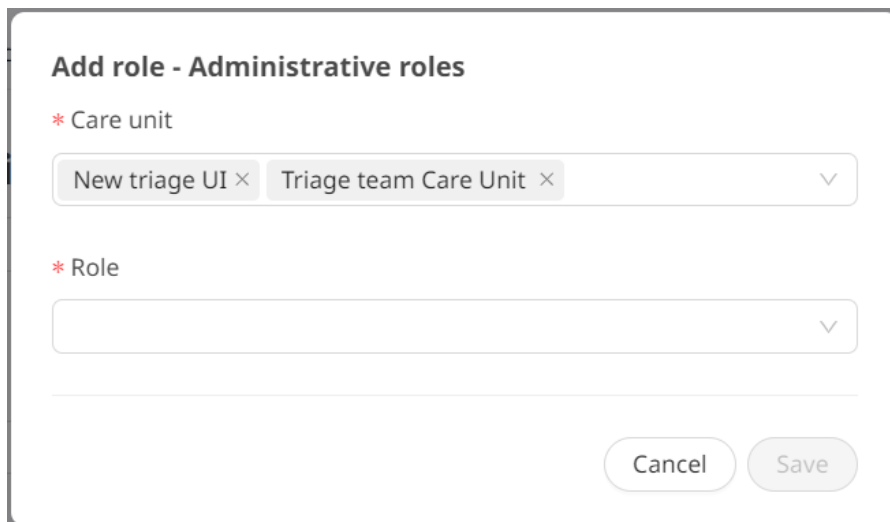
You can either scroll through the list or search for a care unit by typing in parts of the care unit name.



The screenshot shows a form titled "Add role - Administrative roles". Under the heading "* Care unit", there is a search input field containing the text "tri". Below the input field, a dropdown menu is open, displaying two options: "New triage UI" and "Triage team Care Unit". 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 form titled "Add role - Administrative roles". Under the heading "* Care unit", the dropdown menu is now closed and displays two selected items: "New triage UI" and "Triage team Care Unit", each with a small 'x' icon to its left. Below this, under the heading "* Role", there is an empty dropdown menu with a downward arrow. At the bottom right, the "Cancel" and "Save" buttons are visible.

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

Add role - Administrative roles

* Care unit

New triage UI ×

* Role

Create timeslots

- Administrator
- Assess irregularities
- Care planner
- Cash registration
- Create timeslots**
- Schedule to

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

Role	Primary role	Actions
▼ 🏠 New triage UI ▼ Administrative roles		
Administrator	<input type="checkbox"/>	🗑️
Create timeslots	<input type="checkbox"/>	🗑️

11.2.5. Updating a role to be primary for a user

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

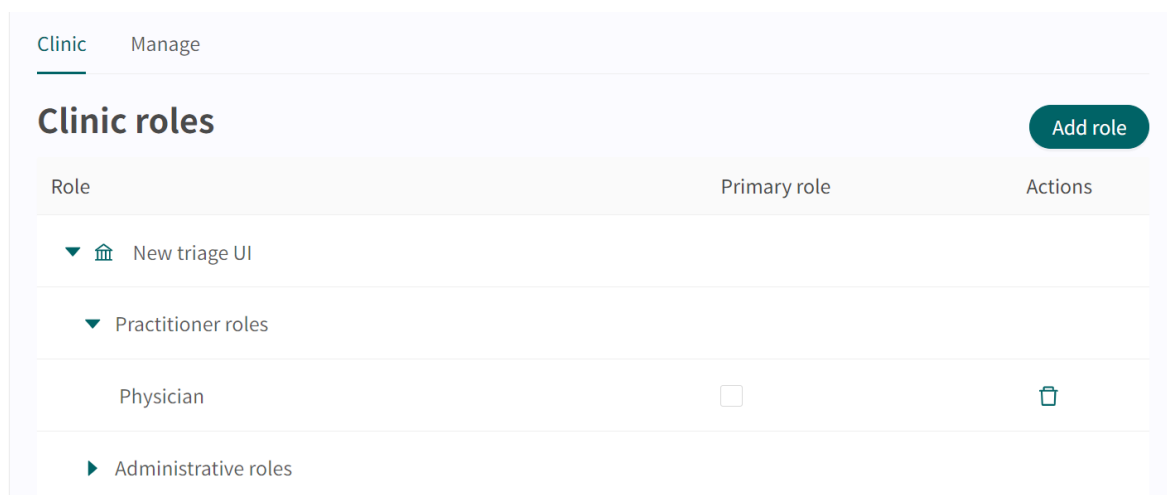
- 2. Search for the user in the search field and click on the user's name in the list.

The screenshot shows the 'Users' management page. At the top left is the title 'Users'. Below it is a breadcrumb 'Users' and a search bar containing the text 'name'. Below the search bar is a table with three columns: 'Name', 'Id', and 'Actions'. The first row of the table has 'Name' with a blurred value, 'Id' with the value 'Doctor', and an 'Actions' column containing an edit icon. At the bottom right of the table are navigation buttons: a left arrow, a box containing the number '1', and a right arrow.

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

The screenshot shows the 'Update user' form. At the top is the title 'Update user' and a breadcrumb 'Users / Update user'. Below is the 'Personal information' section with several input fields: 'HSA-ID' (dropdown), 'Doctor' (text), '+ Add more', '* First name' (text), '* Last name' (text), '* Title' (text), 'Phone number' (text with '+46' dropdown and 'xxxxxxx' placeholder), and 'Email' (text with 'example@namedomain.com'). At the bottom of this section are 'Cancel' and 'Save' buttons. Below is the 'User access' section with a breadcrumb 'Clinic / Manage'. Underneath is the 'Clinic roles' section with an 'Add role' button. A table below lists roles: 'New triage UI' and 'Triage team Care Unit', with columns for 'Role', 'Primary role', and 'Actions'.

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**).



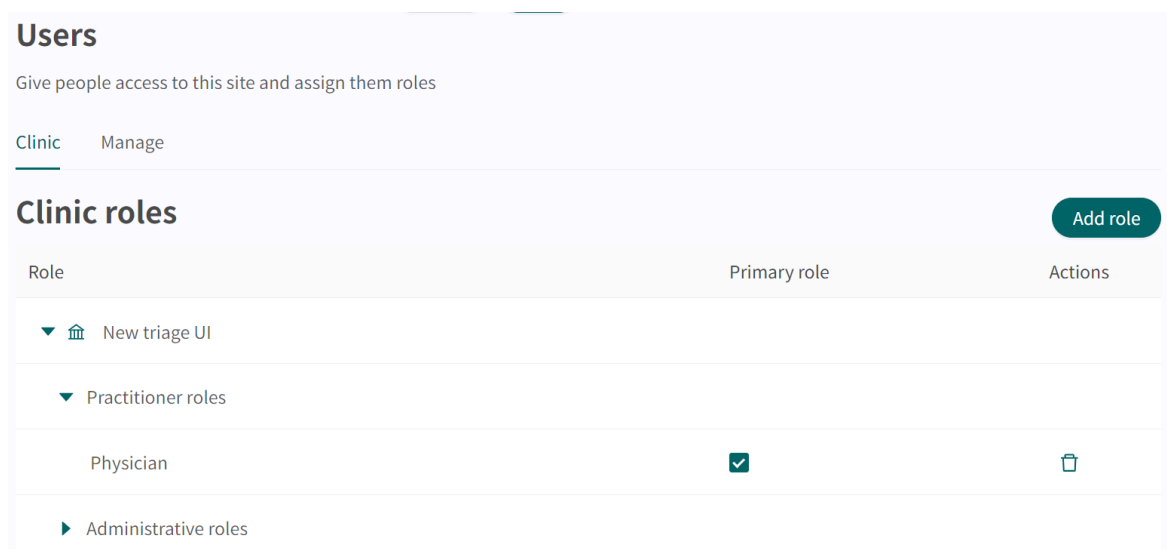
Clinic Manage

Clinic roles

Add role

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

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



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		

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.

The screenshot shows the 'Users' management page. At the top left is the title 'Users' and a breadcrumb 'Users'. To the right is a search bar with the text 'name' and a search icon. Below this is a table with three columns: 'Name', 'Id', and 'Actions'. The first row of the table contains 'Name [redacted]', 'Id Doctor', and an edit icon. At the bottom right of the table are navigation buttons: '<', '1', and '>'.

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

The screenshot shows the 'Update user' form. The title is 'Update user' with a breadcrumb 'Users / Update user'. The form is divided into two main sections: 'Personal information' and 'User access'.
Personal information section includes:

- HSA-ID (dropdown) and Doctor (text input)
- + Add more
- * First name (Name) and * Last name (Surname)
- * Title (Doctor)
- Phone number (+46 dropdown and xxxxxxxx text input) and Email (example@namedomain.com)
- Buttons: Cancel and Save

User access section includes:

- Navigation: Clinic (active) and Manage
- Section title: Clinic roles with an Add role button
- Table with columns: Role, Primary role, and Actions
- Table rows:
 - ▶ 🏠 New triage UI
 - ▶ 🏠 Triage team Care Unit

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.

The screenshot shows the 'Clinic roles' management page. At the top, there are tabs for 'Clinic' and 'Manage'. Below the tabs is the title 'Clinic roles' and an 'Add role' button. A table with columns 'Role', 'Primary role', and 'Actions' is displayed. The table contains three rows: 'New triage UI', 'Practitioner roles', and 'Physician'. The 'Physician' row has a checkmark in the 'Primary role' column and a trash can icon in the 'Actions' column. A confirmation dialog box is overlaid on the trash can icon, containing the text 'Are you sure you want to delete?' and two buttons: 'Cancel' and 'OK'.

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

Some examples of possible autophrases:

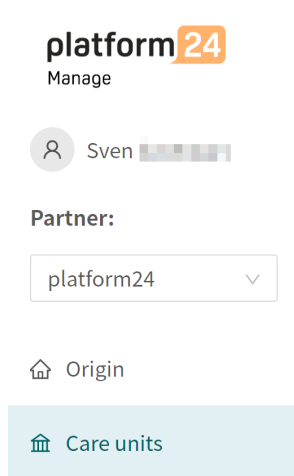
- **Will be sending an electronic prescription soon**
I will shortly issue a prescription for you, when it is ready you will receive an SMS.
The prescription is sent electronically and can be picked up at any pharmacy.
- **Blood pressure questions**
Some blood pressure questions:
 1. When did you last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

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: New triage UI


[Home](#) / [Care Providers](#) / [18E70607-83CC-46B0-985B-CDD973D9A7C5](#) / [Care Units](#) / [584EE09D-9564-4935-9126-5E6A2F969DB0](#)

- Settings
- Basic Details**
- Phrases

Basic Details

Name	<input type="text" value="New triage UI"/>	* HSAID	<input type="text" value="584EE09D-9564-4935-9126-5E6A2F969DB0"/>
Default origin	<input type="text" value="newtriageui"/>	Region	<input type="text" value=""/>
Address	<input type="text" value=""/>	Location	<input type="text" value=""/>
Phone number	<input type="text" value=""/>	Latitude	<input type="text" value=""/>
Longitude	<input type="text" value=""/>	Booking system	<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

Title 1

Text to be used in the new phrase.

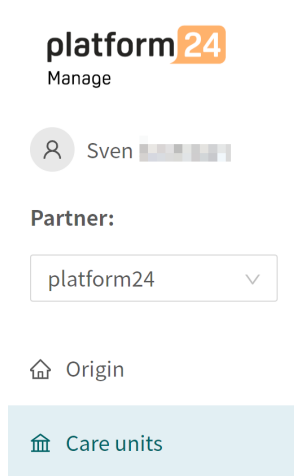
You can format the text in the text field. For instance:

- 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 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.

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: New triage UI

[Home](#) / [Care Providers / 18E70607-83CC-46B0-985B-CDD973D9A7C5](#) / [Care Units / 584EE09D-9564-4935-9126-5E6A2F969DB0](#)

 **Settings**

Basic Details

Phrases

Basic Details

Name * HSAID

New triage UI

Default origin

newtriageui

Address

Phone number

Longitude

Region

▼

Location

Latitude

Booking system



Clinic 24 ▼

Save

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


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.

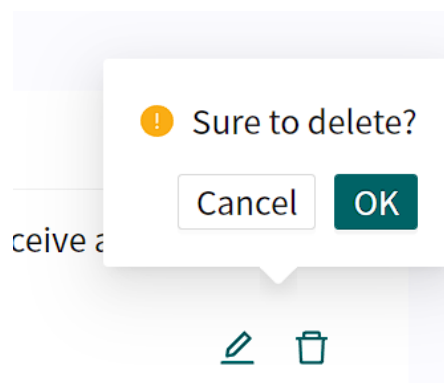
- b. Click on the **Save**  button to save your phrase.

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.

#	Date	Description
8.0	2024-08-15	<p>Main updates are:</p> <ul style="list-style-type: none"> • 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. <i>Symbols definition</i>, 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. <i>Log in to Manage</i> updated to be more generic. Also, duplicate information about the demo and production environments removed (already present in section 5.3.1. <i>Platform24 environments</i>). • Section 6.1 <i>Main menu</i> updated with the name change of the menu item from Practitioners to Users. Links to referred chapters regarding users also updated. • Chapter 7. <i>Configurations and settings for Origins in the Patient app</i> 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. <i>Shut down patient origin</i> and 11.1.1. <i>Appoint an administrator for the care provider</i>. • Chapter 8. <i>Configurations and settings for care units in Clinic</i> 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. <i>Editing and deleting autophrases</i>. • Chapter 10 <i>Administering roles and authorizations for Manage</i> rewritten to describe the new way of adding and editing Manage roles. • First paragraph in section 11.1.4. <i>Before training and go-live</i> updated with that required authorizations should be added to the Clinic users. • Images and text in section 11.2. <i>Adding authorizations</i> updated to reflect the changes in the user interface such as for example updated names of dialogs. • Last step in section 11.2.2. <i>Add a practitioner role</i> and 11.2.4. <i>Add an administrative role</i> updated. • In section 11.2.3. <i>Administrative roles</i>, 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. <i>Autophrases</i> 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.