ENGLISH

User Manual – Clinic

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Platform24 Healthcare AB

Västra Järnvägsgatan 7, SE-111 64 Stockholm

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 full User Manual for Clinic (the practitioner user interface).

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
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. Definition of symbols and precautions

3.1. Symbols definition

Manufacturer

Consult instructions for use

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

3.2. Precautions definition

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

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

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

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

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

TIP
A tip indicates recommendations for the user.

4. Safety precautions

CAUTION
Never send patient data by e-mail.

IMPORTANT
Active mode means that Clinic is running in a live healthcare environment and practitioners receive real patients.

5. Summary

The following working instructions document describes the various functions in *Clinic*. Different care units have different digital flows and different roles may have different access rights, which is why some sections in these working instructions may not be relevant to you.

It is a good idea to go through the working instructions at least once, but it can be difficult to remember all the sections that are relevant to you. Make sure the document is readily available to give you access to sections you wish to go over again in the future.

The main purpose of the platform is to ensure your work runs as smoothly and easily as possible without compromising on medical quality. *Clinic* is the healthcare professionals' module of the platform where chat and video consultations take place. Chat history, images and files sent in the platform, as well as the automated medical history created during triage and the medical record entries that healthcare practitioners create in Clinic, are handled according to the Patient Data Act (PDA), which means that the information is stored for at least 10 years, unless the responsible care provider requests deletion before then. Video consultations and phone calls in Platform24 are not saved.

Healthcare practitioners are granted permission to access Clinic by the care unit *administrator* who sets access rights.

A *unique personal identifier* is required to log into Clinic.

Clinic is updated regularly. Minor updates occur frequently, which will not be noticeable. When it comes to major updates, your care unit will be informed in advance, and it is important that you update the page to ensure these updates are enabled. To do this, click the Refresh button (usually a circular arrow in the upper left corner) in your browser.

NOTE
All personal data in the images used in the user manual are randomly generated and assigned random names. They do not, in any way, represent real people.

6. Working Methodology

6.1. Overview

It is important to have an effective working methodology to ensure work is carried out in a safe and smooth way. The following section provides tips relating to a good working methodology when working with patients in a digital flow.

6.2. Read up prior to a consultation

Open the patient's medical record in your regular medical records system. Remember to always read the patient's triage/medical history details and study any images before you start the appointment, if such information is available. Then start the conversation by indicating that you have read the information. It is rarely good to start the conversation with open questions, as this will make the patient feel that they need to repeat themselves.

If the patient has been booked for an online appointment by healthcare practitioners, the triage/medical history details will not be displayed in the medical history window for your appointment. In Clinic, you can then access any booking details under the medical history window. If the appointment is booked according to the Scheduled free timeslot type (refer to a section further on in these instructions for information on different timeslot types), pre-information will not be displayed prior to your appointment. There is then likely to be pre-information from a previous online appointment or it is likely documented in your regular medical records system.

NOTE
Post-triage questions (additional questions posted before the consultation and potential free text information from the patient) is not part of the triage prioritization but can add clear value for the consultation.

6.3. At the end of each session

- Go to the Start page
- Are there any appointments that have not been marked as completed?
- Are there any messages you should reply to that have not been answered?
- Log out

6.4. Child patients

Children that are too young to seek care for themselves, can have their legal guardian act for them. To clearly indicate to healthcare practitioners that the appointment is for a child, these consultations also contain information about the legal guardian.

7. Log in and log out

7.1. Log in to Clinic

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

   NOTE
   Some customers might have a unique environment link. Talk to your superuser 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.

7.2. Log out of Clinic

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

8. Data security

8.1. Overview

As with any handling of sensitive information, it is very important to consider data security. This is primarily to protect sensitive patient information but also to prevent unauthorized use of your name.

You are responsible for handling your login credentials in a secure way to prevent unauthorized users to gain access the application.

Never leave your computer unattended with your login activated.

NOTE
Make sure you always log off when you leave your computer.

8.2. Recommendations

Our recommendations to further ensure data security:

- Always use computers with an encrypted hard drive
- Never connect your computer to networks that do not require a password
- Never connect your computer to networks that are unknown to you
- Never insert a USB stick into your computer unless you are 100% sure of the contents of the USB stick
- Ensure active and up-to-date antivirus software is used
- Never download unknown files from the internet
- Do not open emails from unknown users

9. Shift type

9.1. Overview

There are different shift types to customize the user experience. The shift type is preselected, but it can be changed by clicking on your name on the left when you're signed in to Clinic. Also refer to Your profile [61]

If the system loses contact with your browser, e.g., due to a slow internet connection, you close the tab, the computer goes into sleep mode or if there are technical errors, your shift will be paused after 30 minutes (does not apply to the *Scheduled* shift type). This means that you will no longer be visible as a logged-in colleague, but you will however continue to receive SMS notifications if you have set this up. If no contact is re-established within 12 hours, the shift will be completely shut down and you will no longer receive notifications (does not apply to the *Scheduled* shift type).

9.2. Different shift types

Drop-in (Primary line): The main task is to receive drop-in patients. The **My Current** filter will show new patients in the queue, appointments with new asynchronous messages, ongoing synchronous appointments that you have started, as well as upcoming scheduled appointments in the next 30 minutes for *Your role*. You can choose to receive notifications for new patients in the queue as well as for new asynchronous messages.

Scheduled: The main task is to receive patients with an appointment. The **Today** filter will show booked appointments for the current 24 hours for those patients that are booked to you as well as those patients who are not booked to any specific resource but for *Your role*. This ensures a better overview and daily planning. Your shift will not end automatically if you are logged in with shift type **Scheduled**.

Drop-in (Secondary line): The main task is to assist the **Drop-in (Primary line)**, but you can also work as **Drop-in (Primary line)**, with two important differences:

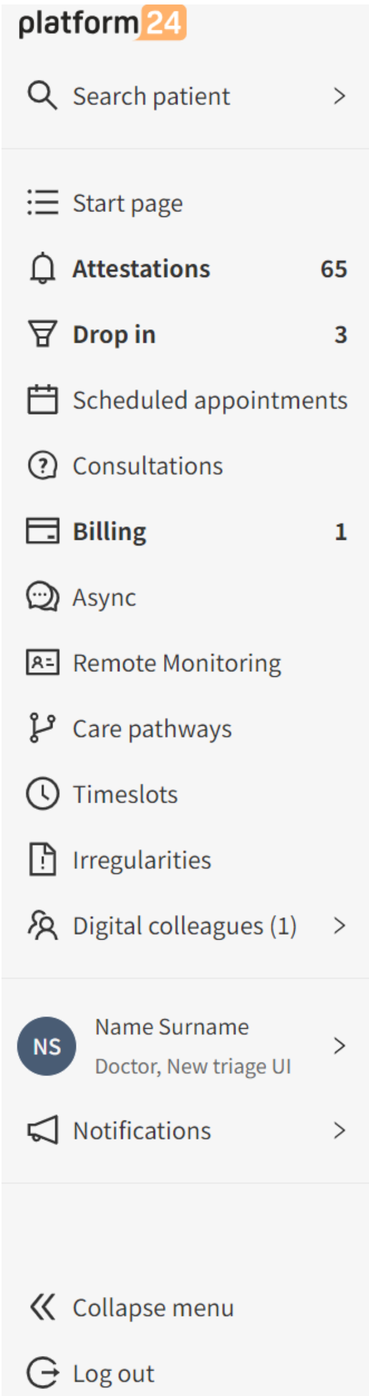
- **Drop-in (Secondary line)** staff receive certain notifications that **Drop-in (Primary line)** staff do not; when there is a long queue or when there are no **Drop-in (Primary line)** staff logged on.
- Notifications are sent on the condition that the user has registered their mobile number in Clinic.

None: If you log into the system without planning to receive new patients. You will not be visible under **Digital colleagues**.

10. Main menu

10.1. Overview

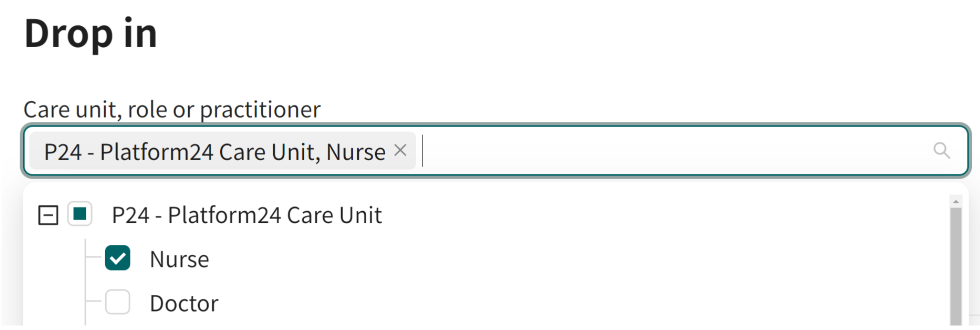
The main menu can be viewed on the left-hand side of the display when you are logged in to Clinic.



The number of items in the main menu vary depending on your care unit's configuration and your own access rights.

There is a global resource filter that filters the lists in some of the Clinic pages based on care unit and practitioner. The selected filter will then be applied for all Clinic pages where this is applicable:

Attestations, **Drop in**, **Scheduled appointments**, **Consultations**, **Billing** and **Async**. For more information about the global resource filter, see Global resource filter [22].

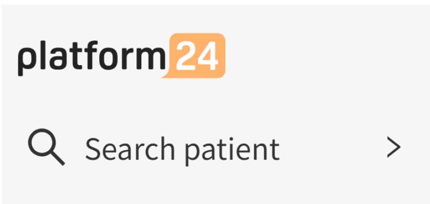


The menu item **Remote Monitoring** belongs to the RPM24 product that enables healthcare practitioners to remotely monitor patients' measured and reported parameters. For more information about the RPM24 product, refer to the *RPM24 User Manual*.

The menu item **Care pathways** belongs to the Pathways product that is used to automate and connect care activities for planned episodic care. For more information about the Pathways product, refer to the *Pathways User Manual*.

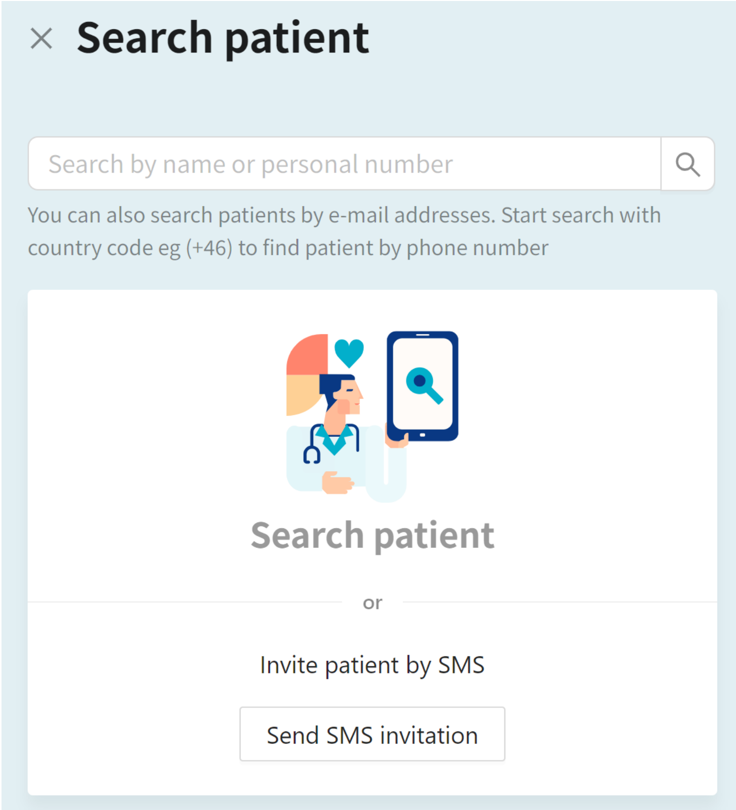
10.2. Search patient

When clicking on **Search patient** in the main menu, you can search for a patient, register a new patient and send a text message with a link to the Patient app.



10.2.1. Search for a patient

To search for a patient, enter a name, unique personal identifier or a phone number (including the country code) and press *Enter*. Click on the patient's profile to, for example, access previous appointments, book the patient for a new consultation or send an asynchronous message.



Note that the image only is an example. The Search patient option will look different depending on customer configuration.

If you want to send your web app link to a patient, click **Send SMS invitation**. This function is useful if, for instance, during a physical meeting or phone call, you inform the patient that you can be reached online, and recommend that the patient, for example, uses this channel to contact you in future.

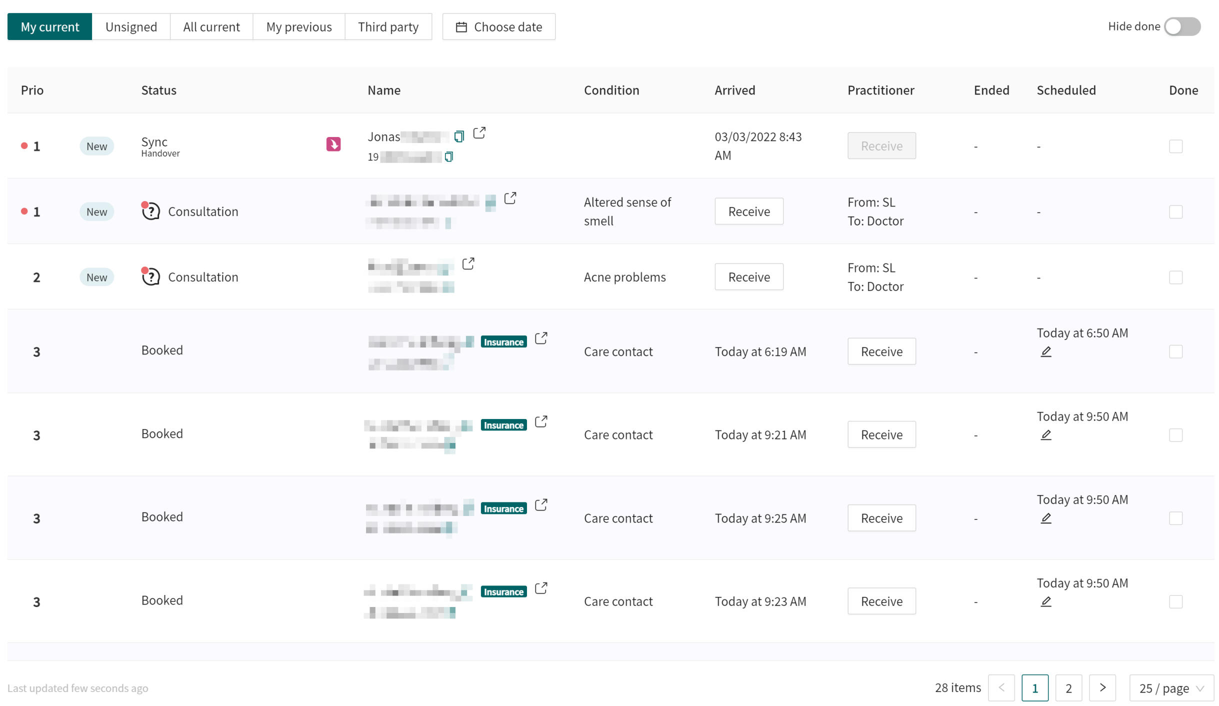
10.2.2. Register a new patient

If you searched for a patient that was not found in the system, the **Create patient** option is displayed. Click there and follow the steps to register a new patient.

How to create a patient in Clinic is customer-specific and depends on if integrations are in plate to fetch patient information such as name, contact information and guardian. Talk to your superuser or internal support if you have questions about this.

10.3. Start page

Different tabs are shown in the top section when **Start page** is clicked. The tabs displayed are determined by the care unit in question. Examples: *My current / Today*, *Unsigned*, *All current*, *My Latest*, *Select date*.



An appointment list/ledger is displayed in each tab/filter. The role (type of access right) entered for you in Clinic controls which ledger you can view for different shift types.

The ledger has different columns which are described in Columns in the ledger [21].

10.3.1. Filters displayed for the Drop-in (Primary line) shift type

- **My current**: Shows patients in drop-in queue for your role (doctor/nurse, etc.) at your care unit, your ongoing appointments, your unanswered asynchronous messages, *asynchronous messages* belonging to a colleague who has answered them within 2 hours, and scheduled appointments for the next 30 minutes, appointments handed over to you or your role and consultation appointments for you or your role.
- **Unsigned**: Here you can view your completed appointments for which you have not signed the entries.
- **All current**: Shows patients in queues and ongoing appointments with your role (doctor/nurse, etc.) at your care unit, scheduled appointments for the next 30 minutes and unanswered asynchronous messages.
- **My latest**: Displays your last 50 appointments
- **Select date**: Here you can filter appointments based on date, care unit, role and healthcare practitioner.

10.3.2. Filters displayed for the Scheduled shift type

- **Today**: Displays today's scheduled patients for your role, for you and for your care unit where the recipient has not been specified, as well as *asynchronous messages*. You can click **Today** and actively select a different time interval from the list you want to view for scheduled patients.
- **Unsigned**: Same as for the Drop-in (Primary line) shift type.
- **All current**: Same as for the Drop-in (Primary line) shift type.
- **My latest**: Same as for the Drop-in (Primary line) shift type.

- **Select date**: Same as for the Drop-in (Primary line) shift type.

10.3.3. Asynchronous cases

Asynchronous cases are clearly visible, with Async status and without a **Receive/Not concluded** button. A round colored icon can also be seen in the ledger.

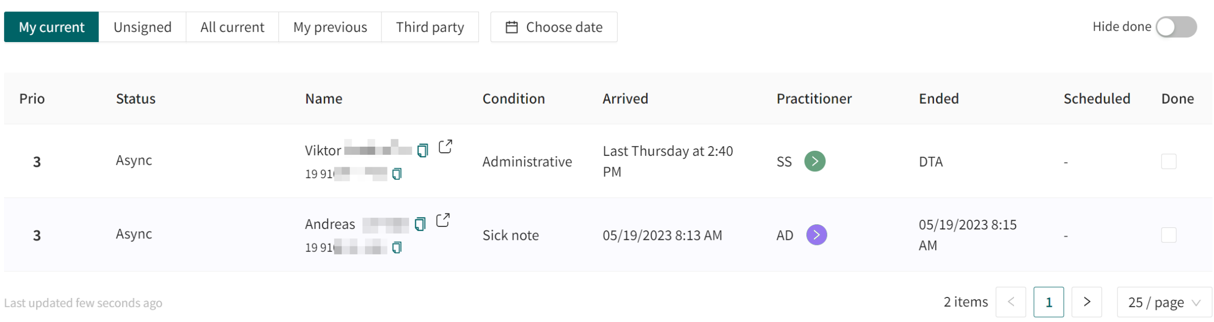
Each asynchronous message from a patient must be opened and handled to remove it from the ledger. Click on the round icon to receive an asynchronous message, and when you access the patient chat, you must either reply to the message or click **Mark as Done**.

On the one hand, it would be best if the person last involved in a case should primarily deal with it, but on the other it is not certain that they are logged into Clinic. To facilitate this, new *asynchronous messages* will be marked with a small, *colored* round icon next to the name in the **Practitioner** column.

- *Green icon:* You were the last contact in this case, so for instance (but not necessarily) you should deal with it.

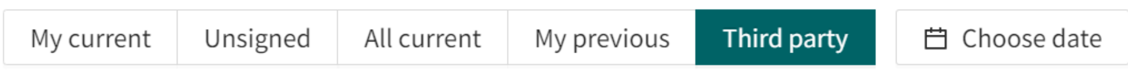
- *Red icon*: Another logged-in colleague was the last contact in the case and should, for instance (but not necessarily), deal with the case.

- *Purple icon*: None of those logged in were the last contact for this case. It does not therefore matter who deals with the case.

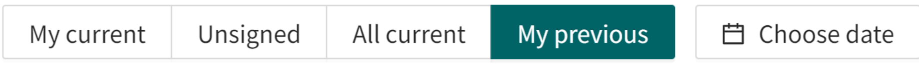


10.3.4. Filter appointments as a guest (third party)

1. If you have been invited to participate in an appointment as a guest (third party), the tab **Third party** is visible.

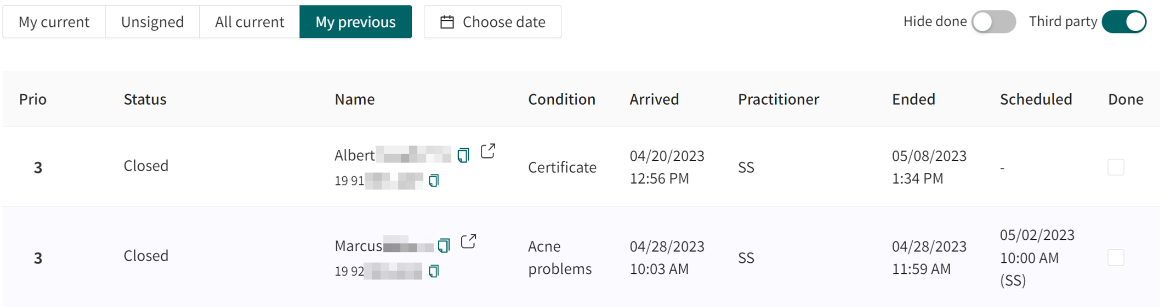


2. The tab disappears when the meeting is over. You can find the appointment by going to the **My previous** tab.



3. Apply the **Third party** filter by using the slider.

This will filter out the appointment as a guest (third party) in the **My previous** tab.



10.3.5. Columns in the ledger

Which columns are shown in the ledger is determined by your care unit.

Prio

Specifies appointment priority defined by the customer. 1 is highest, 5 is lowest. Priority 1 appointments must be received before second priority ones, and so on. Those with the highest priority end up at the top of the ledger. A notification (message) appears in the bottom right-hand corner of the browser window when a priority 1 patient joins the queue. This is described in New prio 1 appointments [22]

Priority can for example be defined as follows:

- Priority 1: Must be dealt with immediately.
- Priority 2: Must be dealt with <4 hours
- Priority 3: Must be dealt with <24 hours
- Priority 4: Must be dealt with in the next week/weeks in consultation with the patient
- Priority 5: Does not require further care

Status

Specifies whether appointments are in a synchronous, asynchronous or completed phase. NEW will be displayed in a red circle for new cases that have not yet been assigned a healthcare practitioner. If there are unread *synchronous messages* or unfinished *asynchronous messages*, the number of messages is shown in a red circle.

Name

The patient's name and unique personal identifier.

Condition

Contact reason for the current appointment.

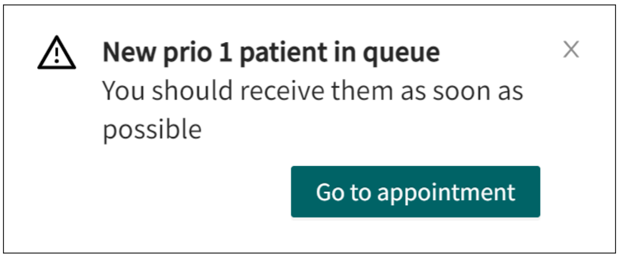
Arrived

When the patient joined the queue.

Practitioner	The initials of the healthcare practitioners registered for the appointment. Hover over this field to see the full name of the healthcare practitioners. If there are no healthcare practitioners registered for the appointment, a **Receive** button will be visible instead to allow you to deal with the patient case. *Not concluded* is displayed if it is a booked appointment where the patient has still not answered all questions or is not logged in for the appointment. If more than one healthcare practitioner is involved with an appointment, then the first initials corresponds to the person who made first contact and the initials within brackets to the person who had the most recent contact. If there are new asynchronous cases for the role you have, a round icon which you can click on to deal with the case will appear here.
Ended	Displayed when a *synchronous contact* is closed. *DTA*, which stands for *Direct to Async,* is specified if the appointment was started in an asynchronous phase.
Scheduled	The time slots for appointments scheduled for a certain time are displayed. If appointments were booked by healthcare practitioners, their initials are displayed. There is also a little box with a pen in it to cancel or rebook appointments.
Done	This checkbox helps you to keep track of which appointments you have completed or not. Other users cannot see whether you click in the box or not. With the **Hide Done** button, it is easy to filter only those appointments that are not complete. This header is not available to all care units.

10.3.6. New prio 1 appointments

When a priority 1 patient queues, a message will appear in the lower right of the web window, regardless of where you are in Clinic. This pop-up window looks like the image here.

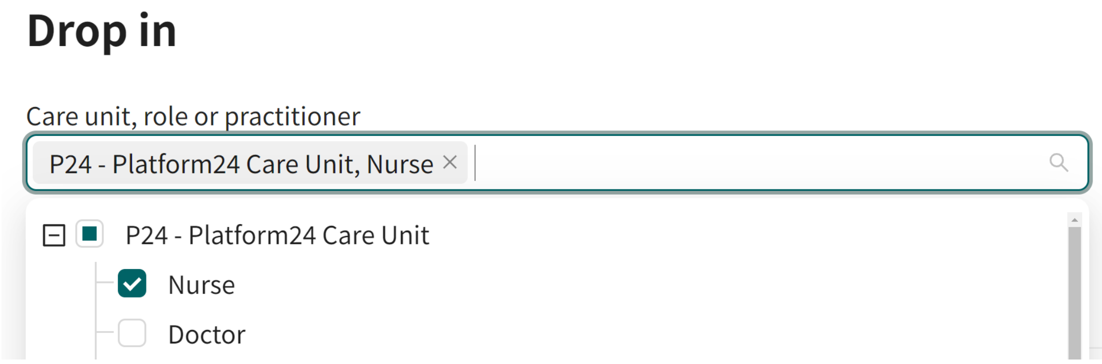


You will see this pop-up window even if you are in a patient appointment and it will also be displayed under the **Notifications** heading in the main menu.

10.4. Global resource filter

The global resource filter is used to filter what you want to see in lists of some of the Clinic pages based on care unit and practitioner. As a default, the filter is set to show your current care unit and role, and this selection is saved for all Clinic pages where this is applicable: **Attestations**, **Drop-in**, **Scheduled appointments**, **Consultations**, **Billing** and **Async**). The selected filtering is also saved when you log in and out from Clinic on the same computer.

If you want to see other roles or specific staff in the pages, you can change that in the global resource filter. Keep in mind that you need to change back to your care unit and role if you only want to see the activities that applies to your role.



10.5. Attestations

Attestations are tasks created either automatically or manually by healthcare practitioners. Which ones are created automatically (if any) are set by your organization, for example when patients have answered interview questions that are not linked to appointments, or if patients do not use their booking tickets.

Attestations created by practitioners always have the attestation type *Task*. The other attestation types are the ones created automatically by the platform.

It is possible to schedule attestations to be shown in the inbox for the future. For example, an attestation can be set on Wednesday next week to call a patient about the test results.

You can also see all attestations for a patient in the **Patient activity** tab (see Patient activity [95]).

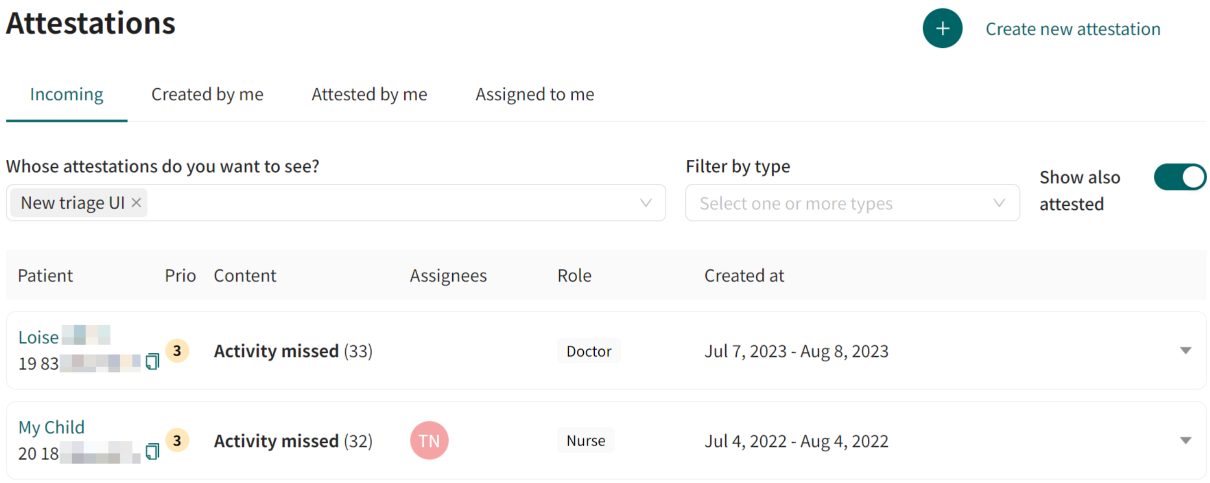
If you attest the attestation without reassigning it to you first, the system will automatically assign you to the attestation and attest it.

> **NOTE**
> This heading is only visible if your care unit has chosen to activate it.

10.5.1. Incoming attestations

All incoming attestations are listed in the **Incoming** tab in the **Attestations** view. The attestations are grouped per patient and sorted by priority.

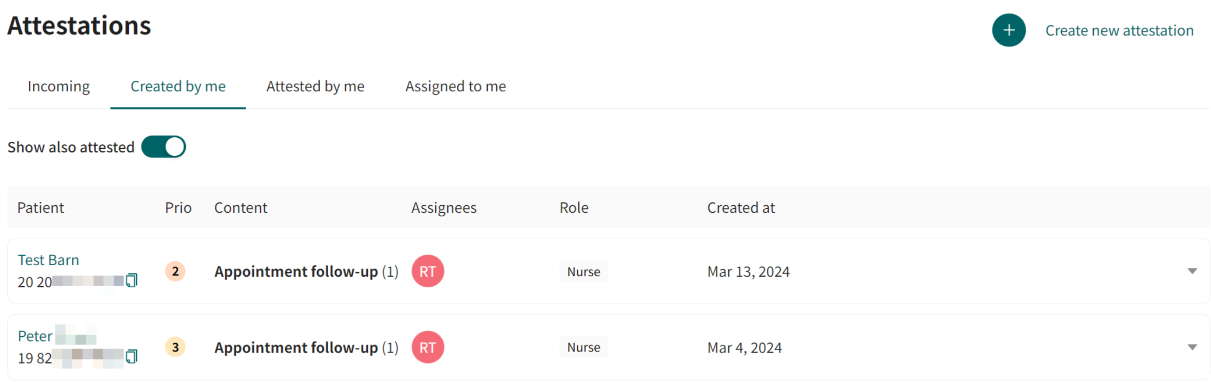
The attestations in the **Incoming** tab can be filtered by care unit and practitioner, as well as by attestation type. Use the drop-down lists to apply these filters. It is possible to select multiple options in the drop-down lists.



Use the **Show also attested** slider to also show the already attested attestations.

10.5.2. Attestations created by me

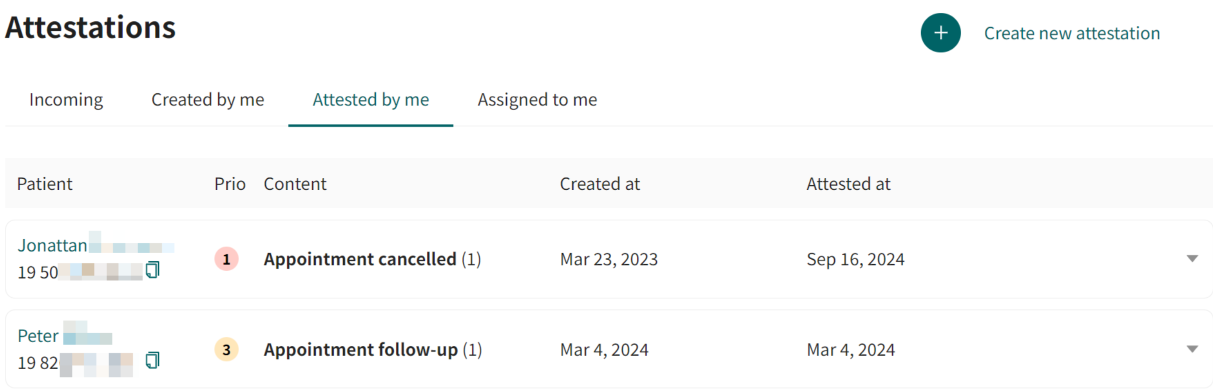
The **Created by me** tab in the **Attestations** view lists attestations created by the logged in practitioner.



Use the **Show also attested** slider to also show the already attested attestations.

10.5.3. Attestations attested by me

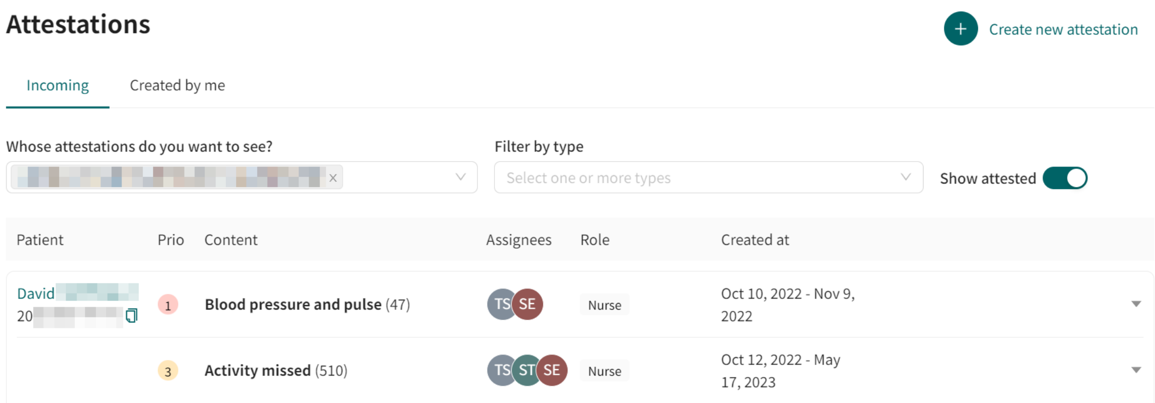
The **Attested by me** tab in the **Attestations** view lists attestations attested by the logged in practitioner.



10.5.4. Creating attestations

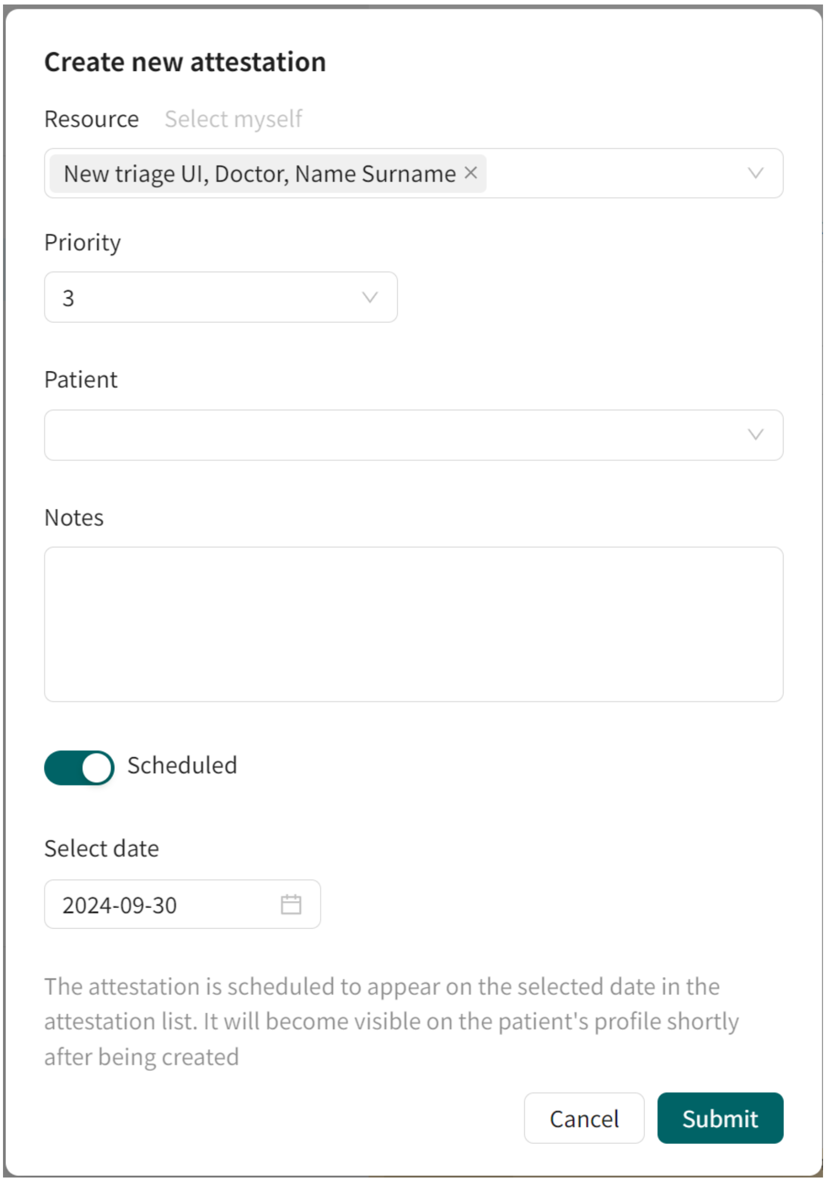
To create a new attestation outside of a patient appointment:

1. Click on the **Attestations** heading in the main menu to go to the **Attestations** view.



2. Click on **Create new attestation** in the top right corner.

3. Enter the fields in the the **Create new attestation** dialog:
   - **Care provider** (if applicable)
   - **Resource** - Expand the tree structure to select the desired role or practitioner.
   - **Priority** - Sets the attestation priority on a scale of 1 to 5, where 1 is most urgent.
   - **Patient** - Add a patient if the attestation regards a specific patient. It is possible to search and add the patient via name or unique personal identifier.
   - **Notes** - Add a note about what the attestation is about according to the procedure at your clinic.
   - Select the **Scheduled** slider and a date to pick a specific date that the attestation will be shown in the **Attestations** view.

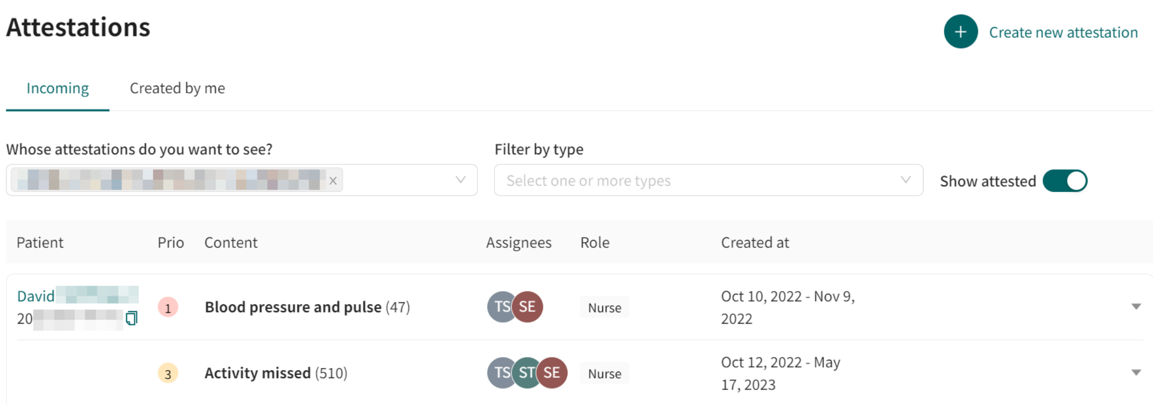


4. Click **Submit**.
   This will create a new attestation record with the attestation type *Task*.

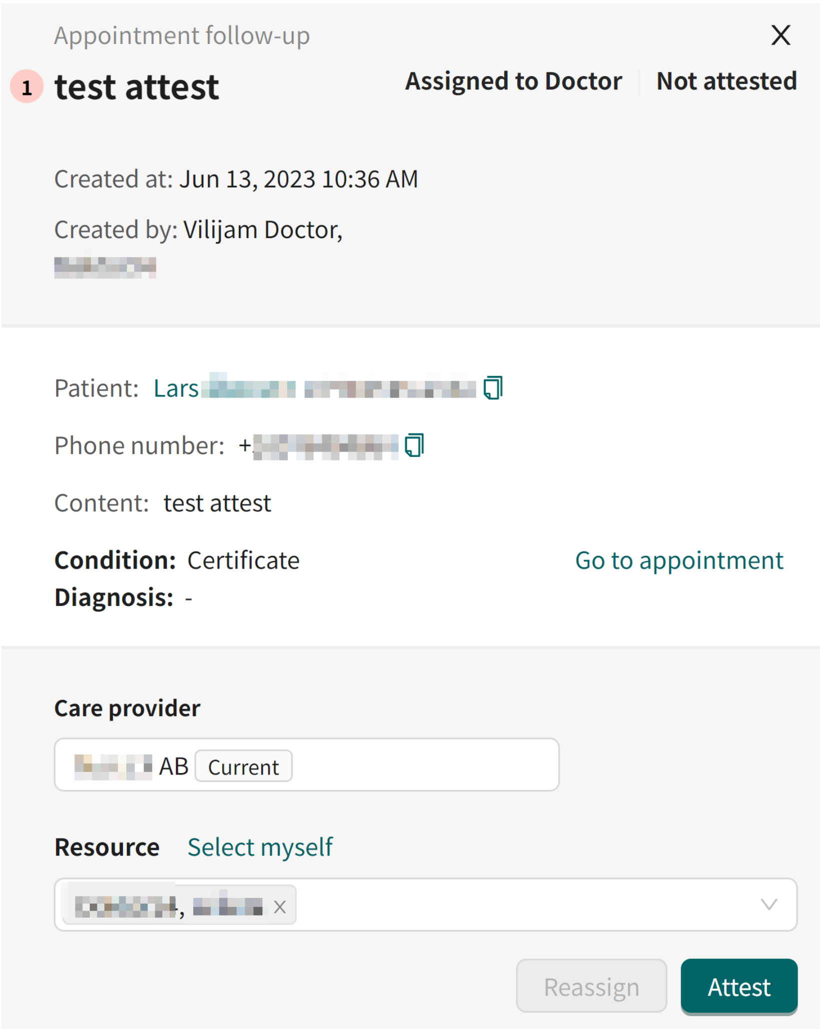
10.5.5. Assign an attestation

To assign an attestation:

1. Click on the attestation entry in the **Attestations** list.

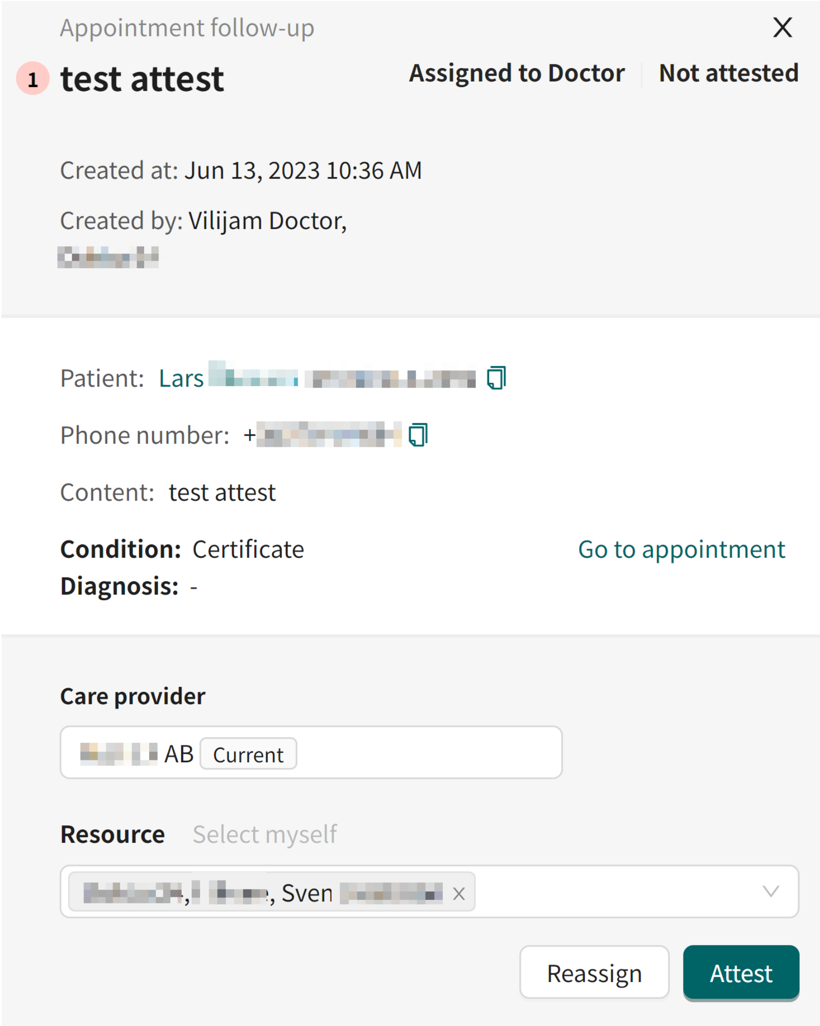


This opens an **Appointment follow-up** area.



2. Assign in one of the following ways:
   a. Select a resource from the **Responsible** list and click **Assign**.
   b. Assign the attestation to yourself by selecting **Assign to me** and clicking **Attest**.

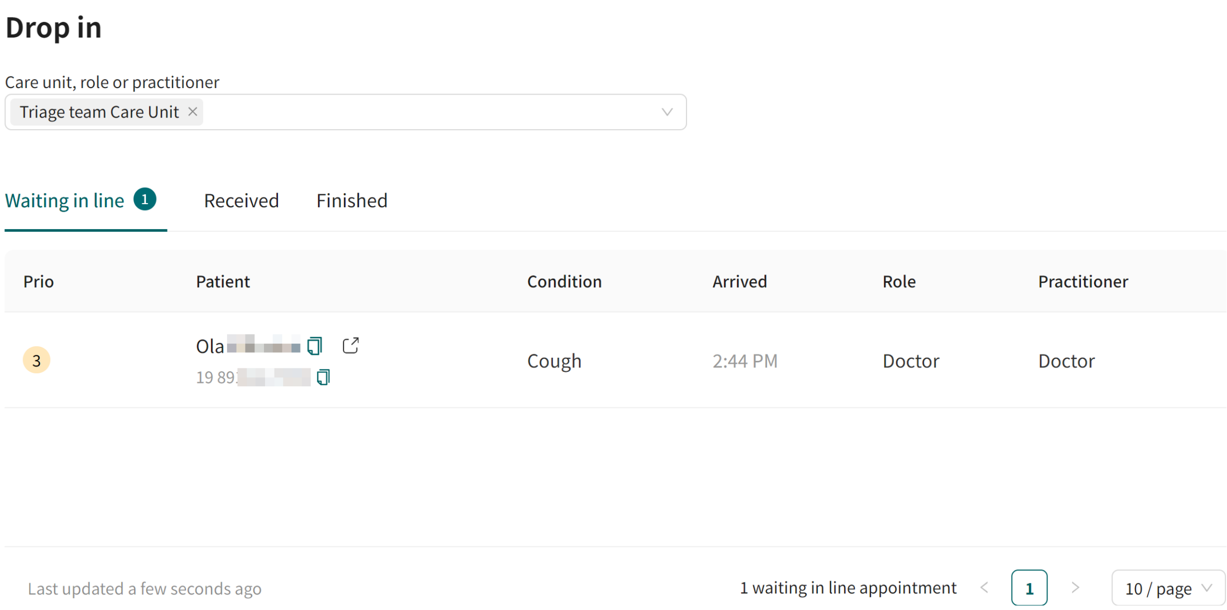
3. If you assigned it to yourself, you can click on **Attest** when you have assessed and handled the content.



10.6. Drop in

Click **Drop in** in the main menu to reach the **Drop in** view. In this view, incoming patients in a drop in care unit are managed.

The **Drop in** view contains three tabs: **Waiting in line**, **Received** and **Finished**. The tab order correlates to a left-to-right workflow that is used in this view.

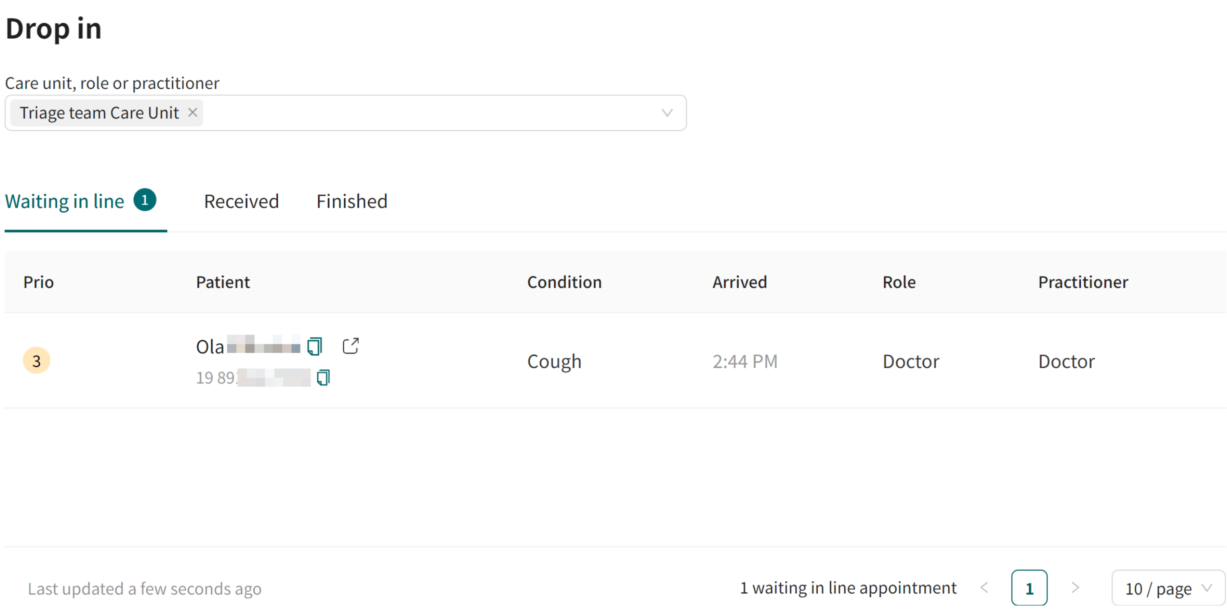


Use the **Only show assigned to me** slider to filter the patients in the **Received** and **Finished** tabs.

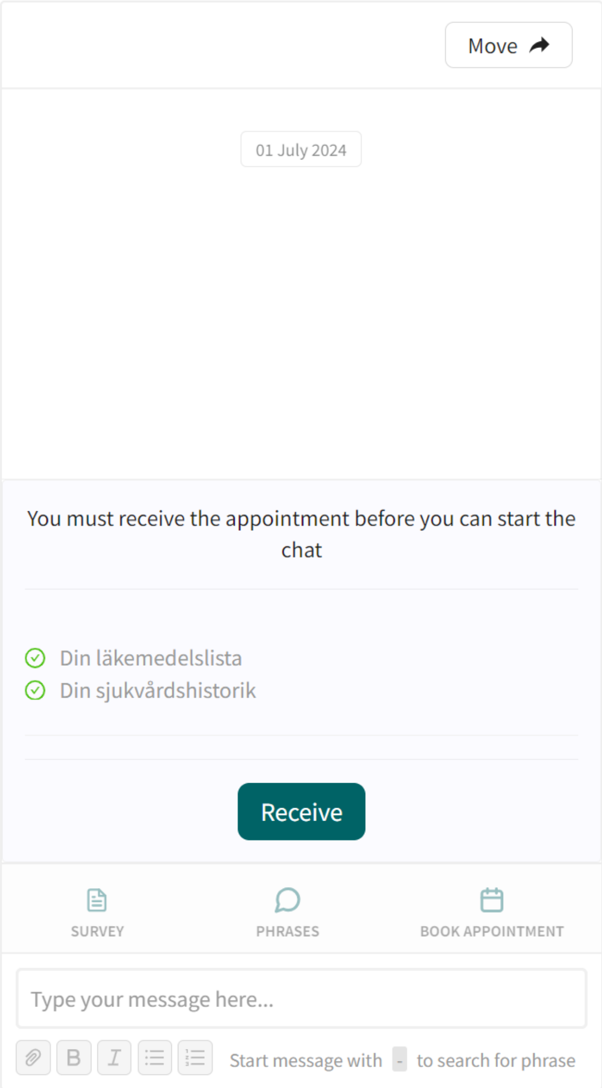
10.6.1. Waiting in line

All patients that are waiting in line are listed in the **Waiting in line** tab. The number next to the tab name displays the number of patients waiting based on the selected filters.

The **Waiting in line** tab is first sorted by priority, and then on what time the appointments arrived (oldest on top).

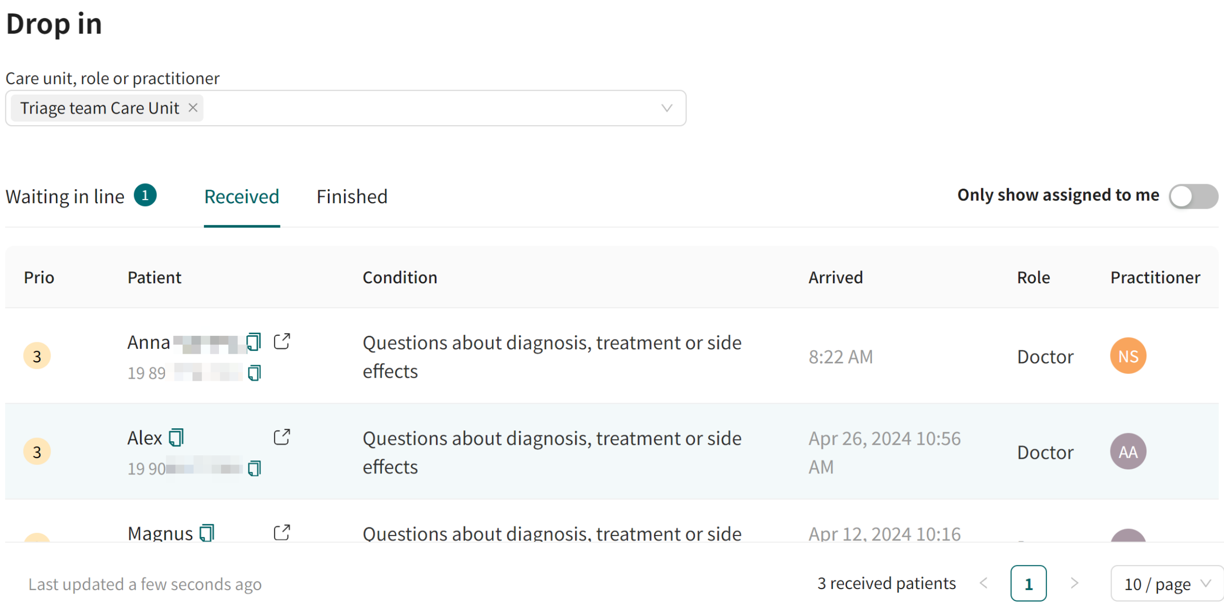


Click on a row in the list to open the patient profile. Click the **Receive** button in the in the chat to receive the patient.



10.6.2. Received

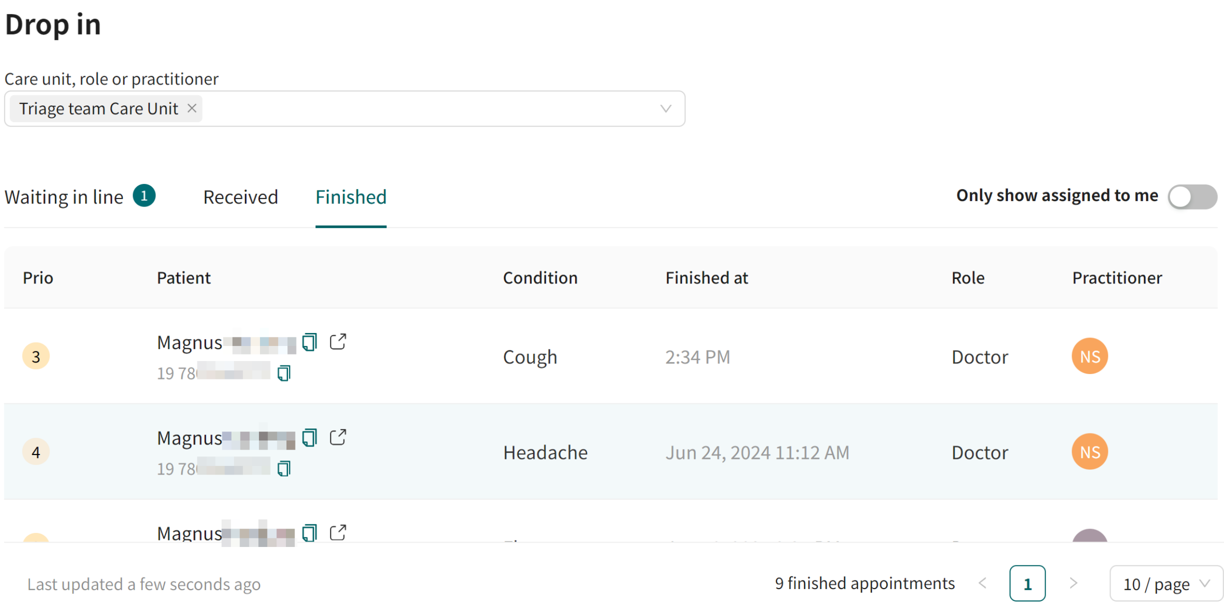
The **Received** tab displays all open synchronous appointments (i.e., meetings in real time either online or in person) where the patient has been received by practitioners.



10.6.3. Finished

The **Finished** tab displays all finished synchronous appointments. These appointments are closed and cannot be used for communication with the patient.

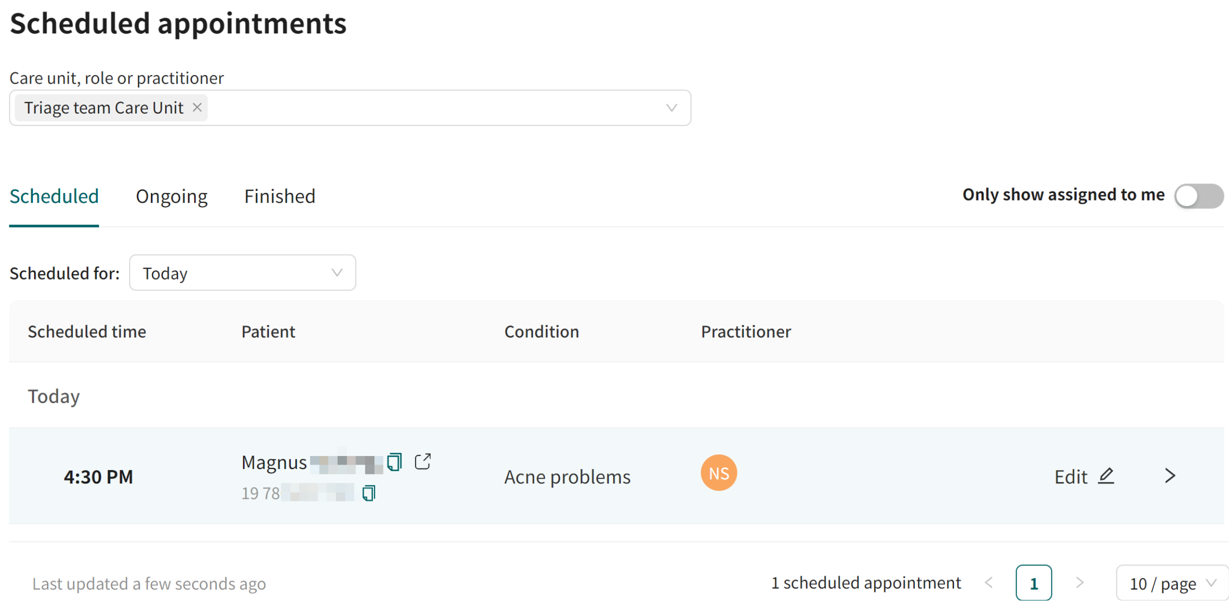
The **Finished** tab is sorted by what time the appointments were finished (newest on top). The tab only shows appointments that have been finished in the last 30 days.



10.7. Scheduled appointments

In the **Scheduled appointments** view, scheduled patient appointments are managed.

Click **Scheduled appointments** in the main menu to reach the **Scheduled appointments** view.



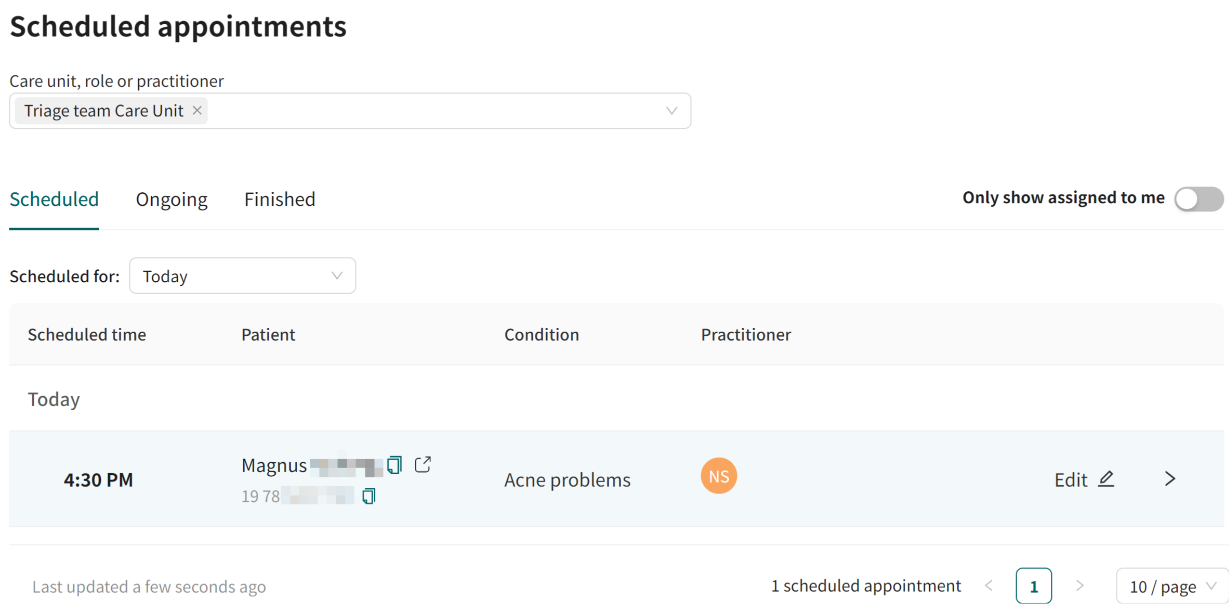
The **Scheduled appointments** view contains three tabs: **Scheduled**, **Ongoing** and **Finished**. The tab order correlates to a left-to-right workflow that is used in this view. Click on a row in the list to open the patient profile view.

Use the **Only show assigned to me** slider to filter the patients displayed in the tabs.

10.7.1. Scheduled

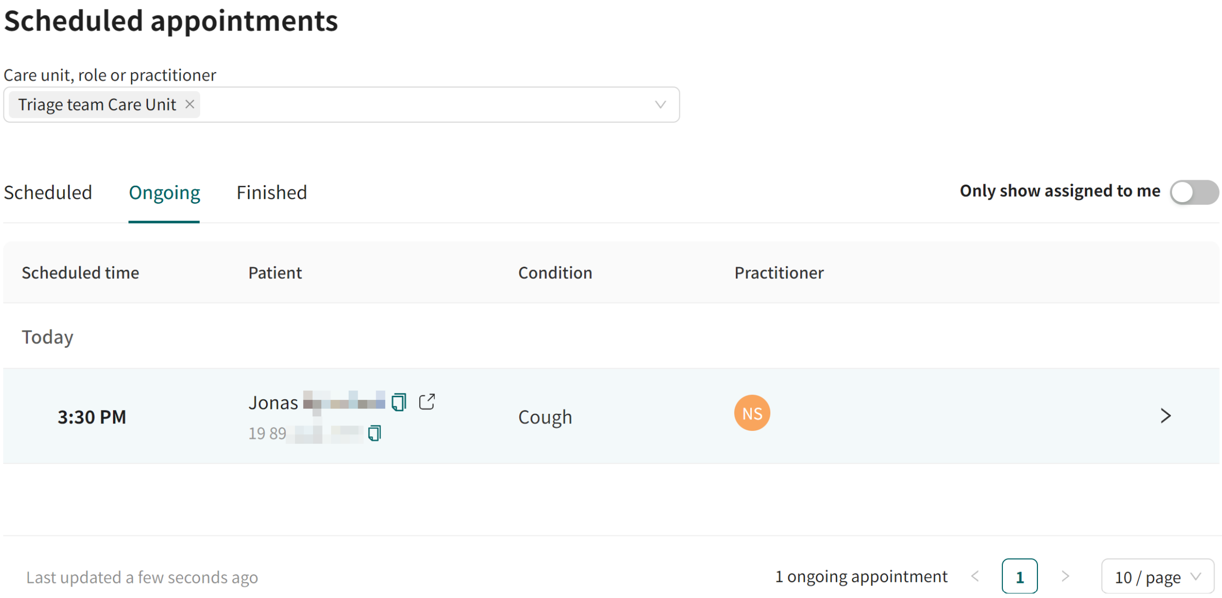
All scheduled patients are listed in the **Scheduled** tab. The number next to the tab name displays the number of scheduled patients based on the selected filters.

The **Scheduled** tab is sorted by when the appointments are scheduled.



10.7.2. Ongoing

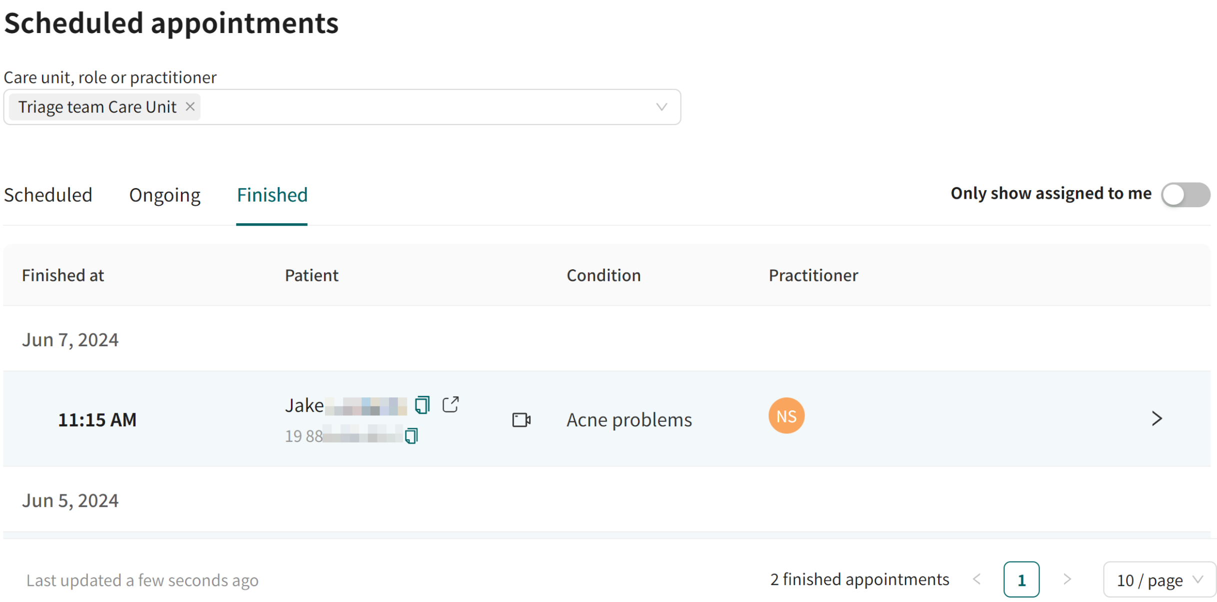
The **Ongoing** tab displays all ongoing scheduled appointments and the tab is sorted by when the appointments started (latest on top).



10.7.3. Finished

The **Finished** tab displays all finished scheduled appointments. These appointments are closed and cannot be used for communication with the patient.

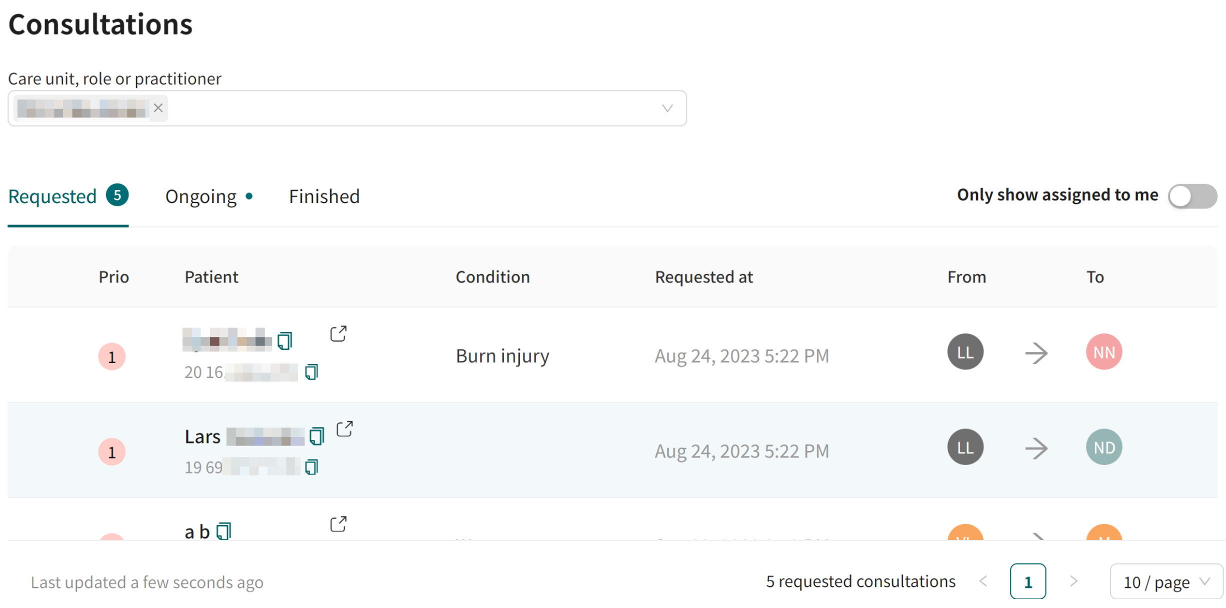
In the **Finished** tab, appointments are sorted by when they were finished (latest on top). The tab only shows appointments that were finished in the last 30 days.



10.8. Consultations

In this view, consultations where you consult a colleague are managed.

Click **Consultations** in the main menu to reach the **Consultations** view.



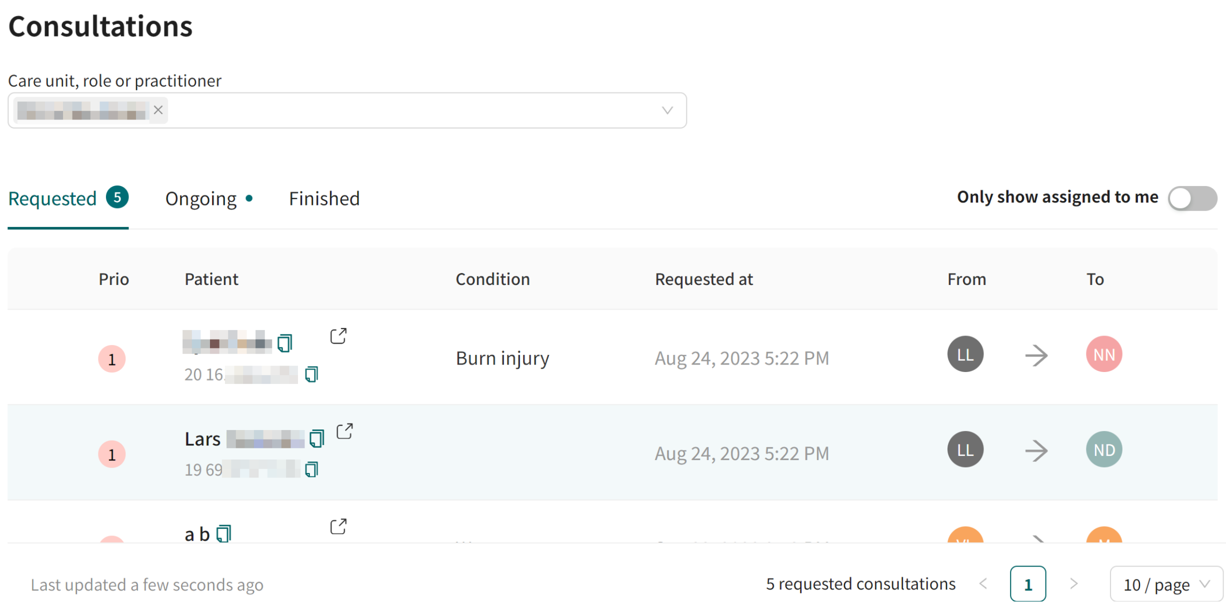
The **Consultations** view contains three tabs: **Requested**, **Ongoing** and **Finished**. The tab order correlates to a left-to-right workflow that is used in this view. Click on a row in the list to open the patient profile.

Use the **Only show assigned to me** slider to filter the content in the tabs.

10.8.1. Requested

All requested consultations are listed in the **Requested** tab. The number next to the tab name displays the number of requested consultations based on the selected filters.

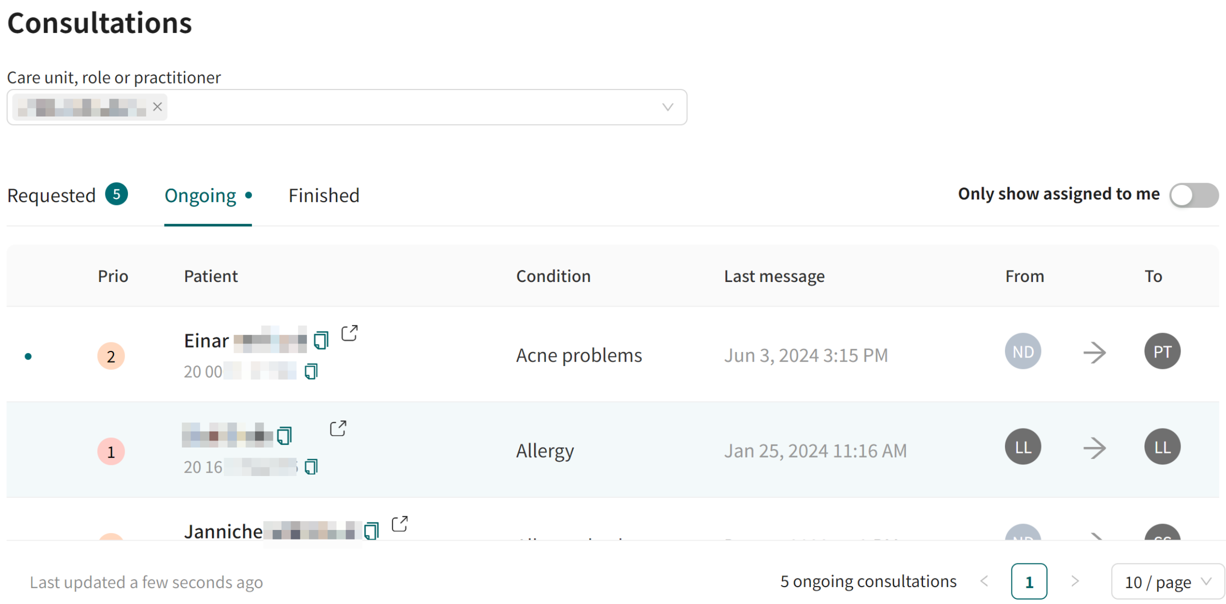
The **Requested** tab is sorted by priority and what time the consultation was requested (oldest on top).



10.8.2. Ongoing

The **Ongoing** tab displays all ongoing consultations.

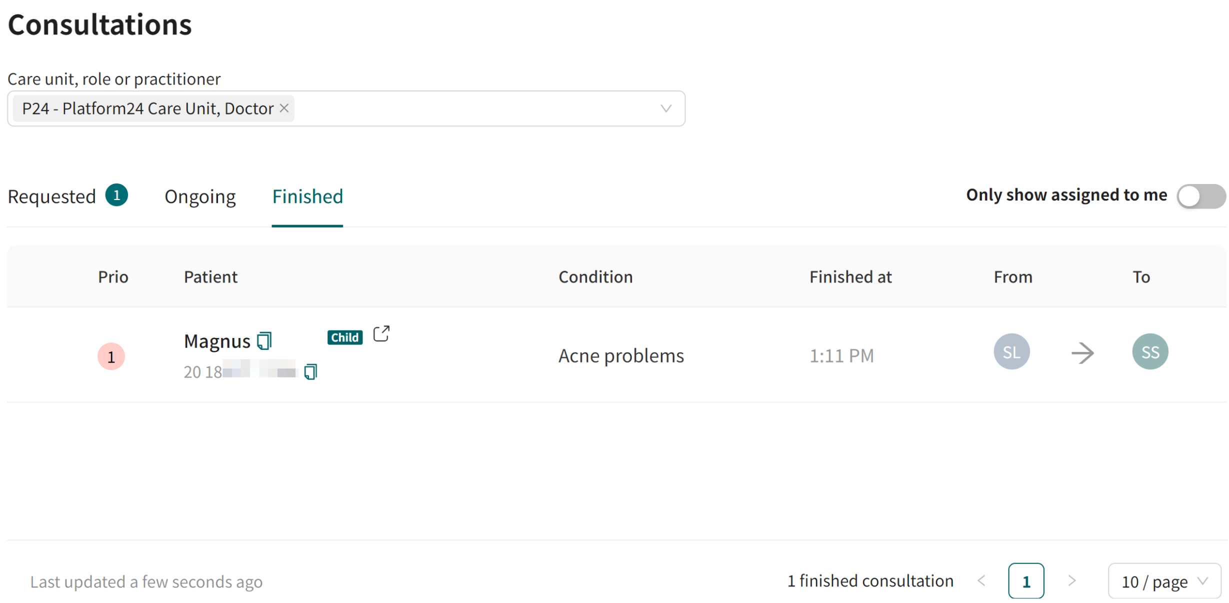
The **Ongoing** tab is sorted by when the last message was sent (newest on top).



10.8.3. Finished

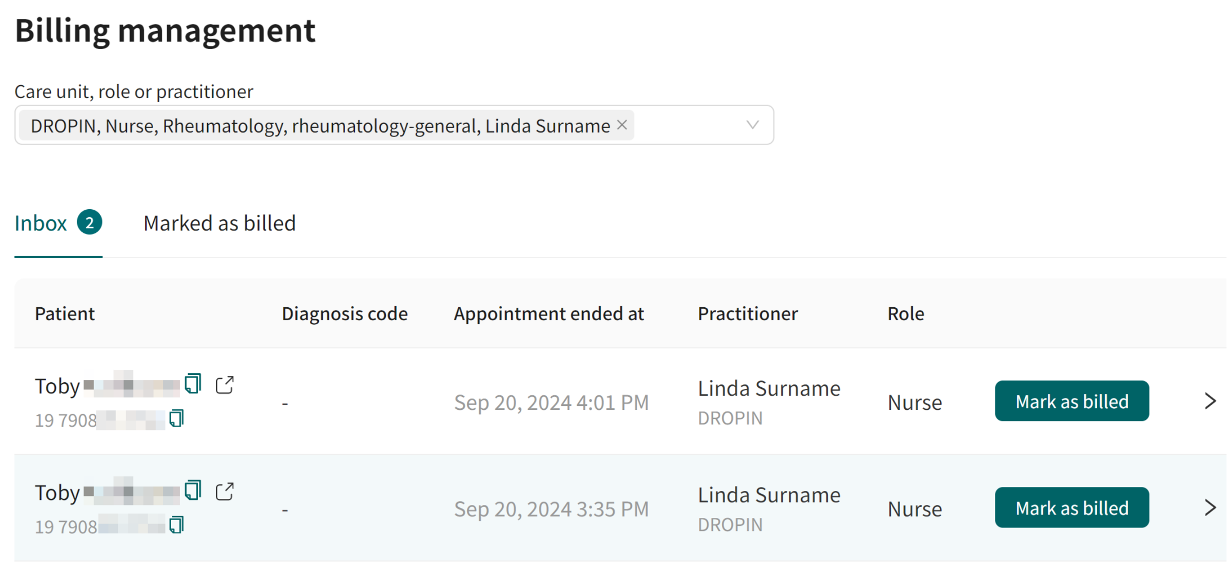
The **Finished** tab displays all finished consultations. These consultations are closed and cannot be used for communication.

The **Finished** tab is sorted by when a consultation was finished or canceled (newest on top). The tab only shows consultations that were canceled or finished in the last 30 days.

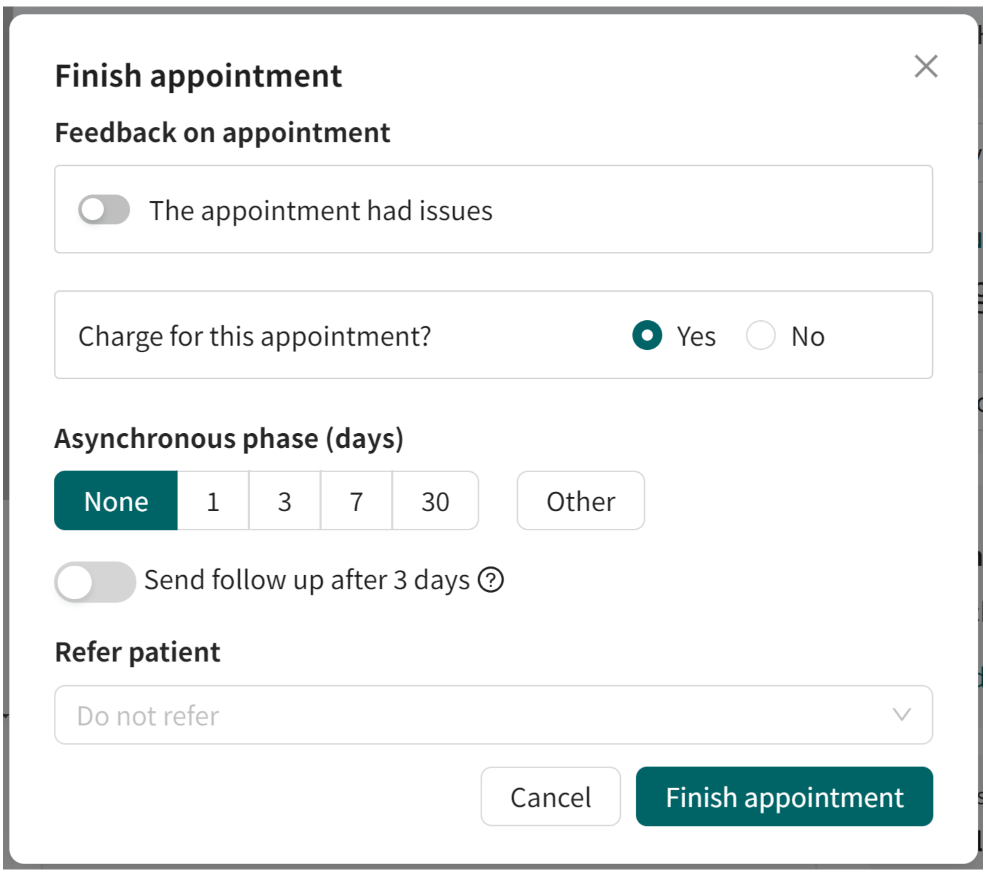


10.9. Billing management

In the **Billing management** view administrators can keep track on billable appointments and make sure they have been billed in the regular billing system.

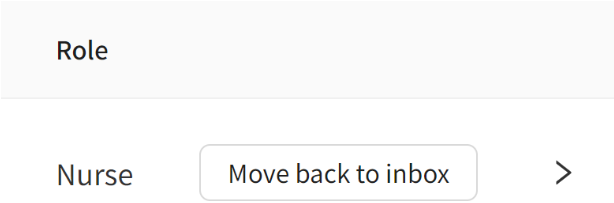


For an appointment to appear in the **Billing management** view, this needs to be indicated in the **Finish appointment** dialog (**Charge for this appointment?** = **Yes**) when finishing an appointment.



Incoming billable appointments will appear in the **Inbox** tab. When the appointment has been billed in the regular billing system, click the **Mark as billed** button and the appointment will move to the **Marked as billed** tab.

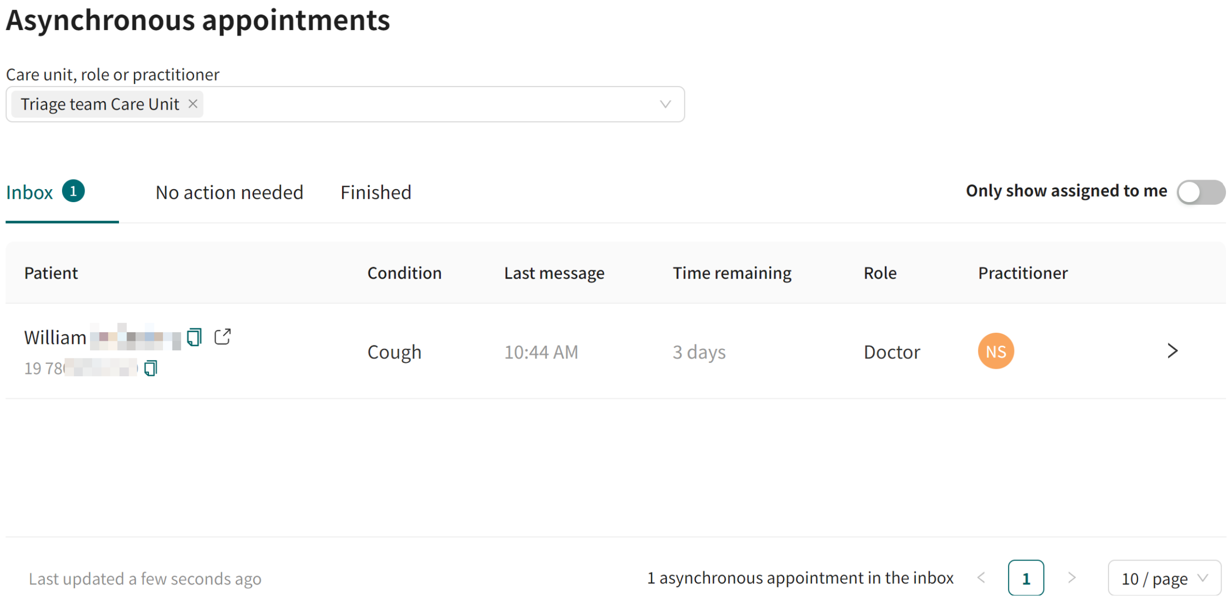
If for some reason an appointment that is marked as billed should be moved back to the **Inbox** (if a mistake was made), it is possible to click the **Move back to inbox** button.



10.10. Asynchronous appointments

An asynchronous appointment is a way to communicate with the patient outside of an ongoing (synchronous) appointment. As the communication does not happen in real time, a notification will be sent to the patient and the practitioner when a new message is available.

Click **Async appointments** in the main menu to reach the **Asynchronous appointments** view.



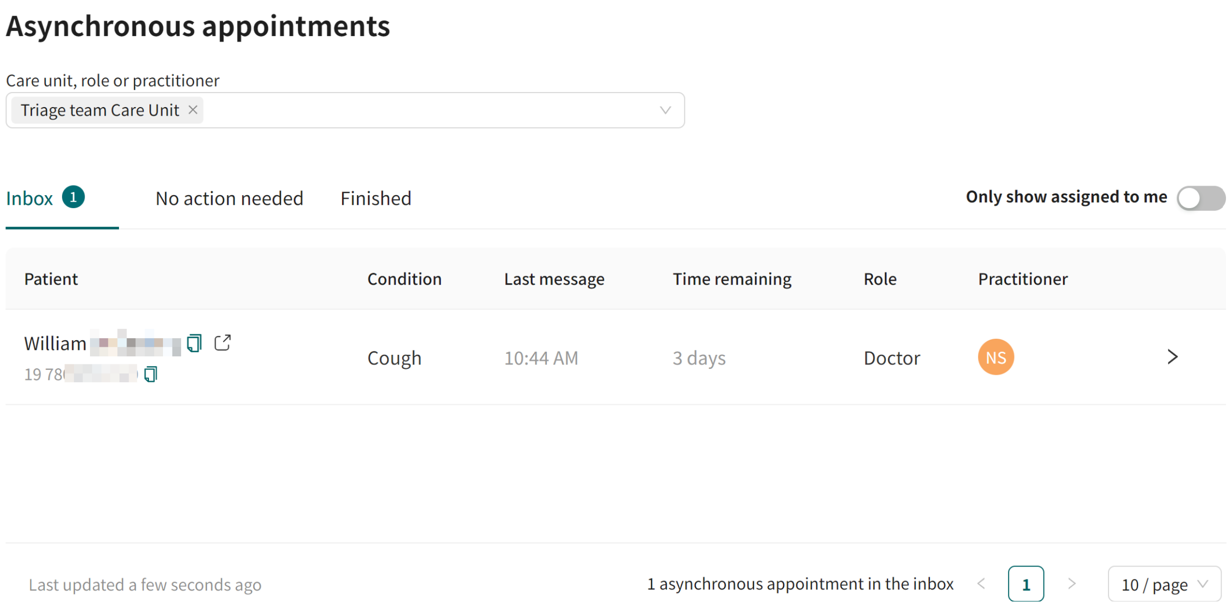
The **Asynchronous appointments** view contains three tabs: **Inbox**, **No action needed** and **Finished**. The tab order correlates to a left-to-right workflow that is used in this view.

Use the **Only show assigned to me** slider to filter the content in the tabs.

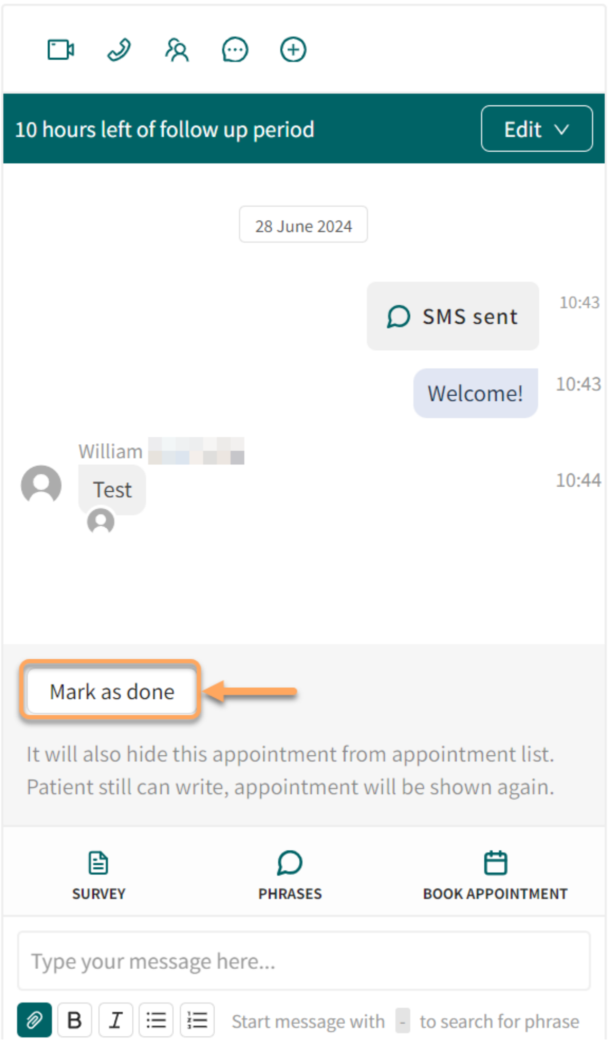
10.10.1. Inbox

If there is a new message from the patient in an asynchronous appointment, the appointment will appear in the **Inbox** tab. The number next to the **Inbox** tab displays the number of appointments in the tab, based on the selected filters.

The **Inbox** tab is sorted on when last message was sent in the chat (oldest on top).



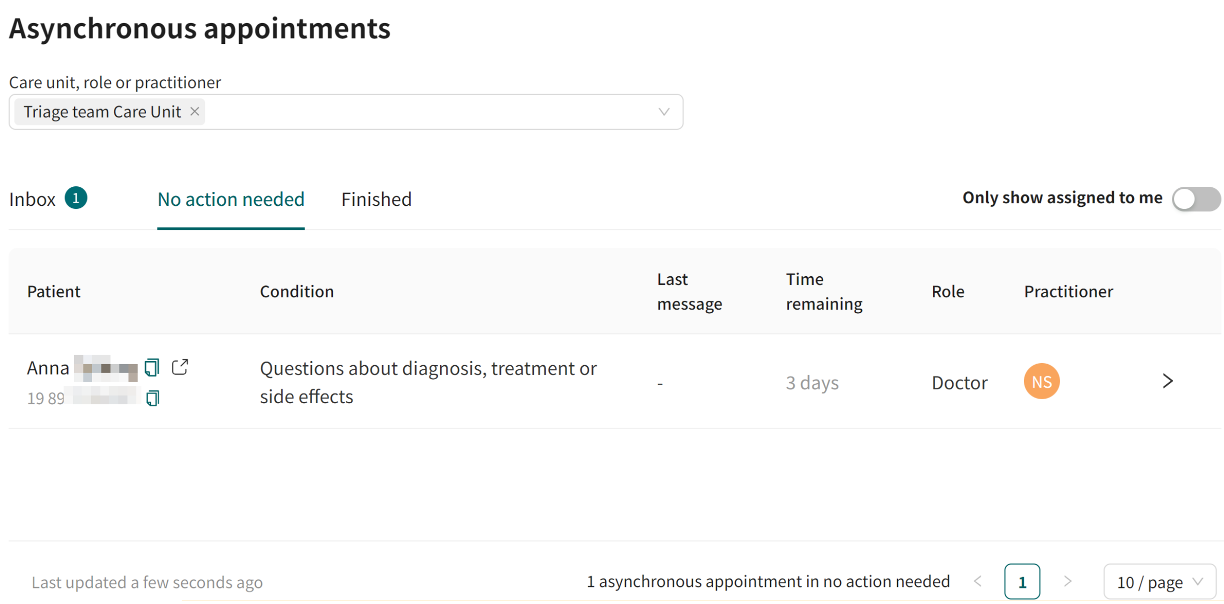
Click on a row in the list to open the patient profile and either reply to the patient or finish the appointment (use the **Mark as done** button in the chat).



10.10.2. No action needed

The **No action needed** tab displays all open asynchronous appointments where the patient messages have been answered by practitioners. There is therefore no action needed for practitioners and a response from the patient is needed to either finish the appointment or answer further questions.

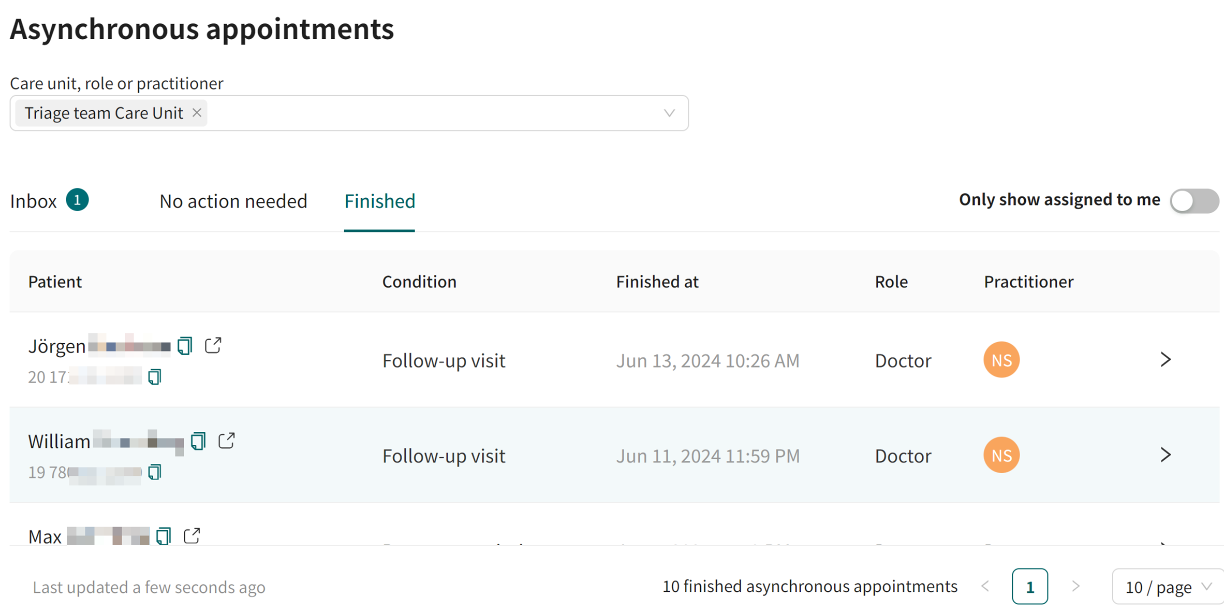
The **No action needed** tab is sorted on when last message was sent in the chat (oldest on top).



10.10.3. Finished

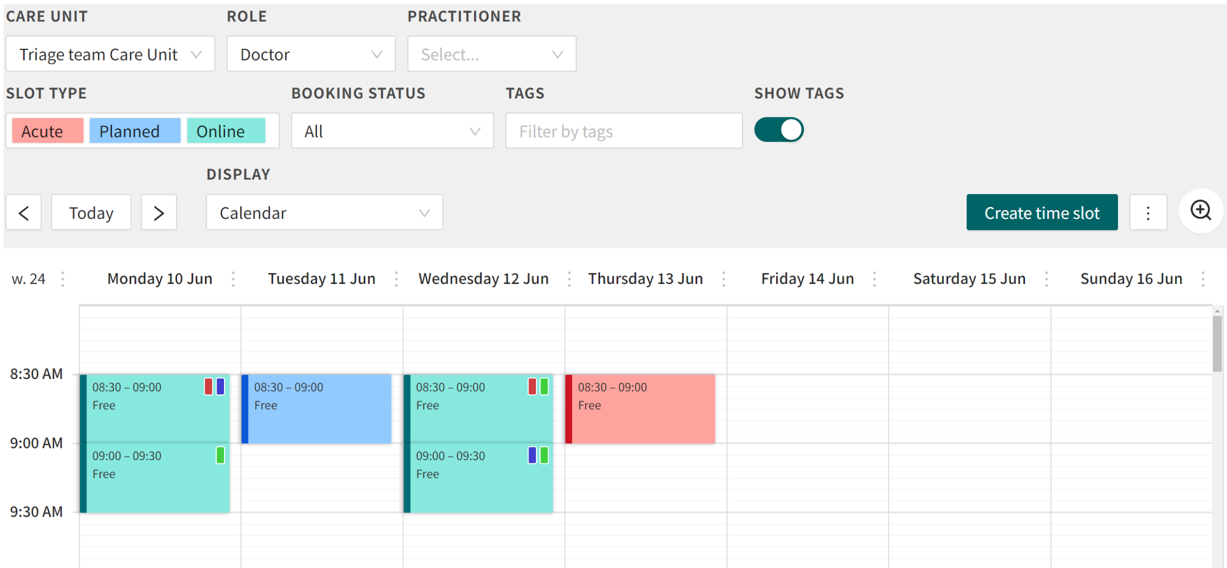
The **Finished** tab displays all finished asynchronous appointments. These appointments are closed and cannot be used for communication with the patient. If there is a need to send another message to the patient, a new asynchronous appointment can be started.

The **Finished** tab is sorted on when the async appointment was ended (latest on top). The tab only shows async appointments that were finished in the last 30 days.



10.11. Time slots

The **Time slots** workspace is not available to everyone. This may be because your care unit does not have a digital flow to schedule time slots, or it might be because only those in your care unit who schedule time slots have access to this feature.

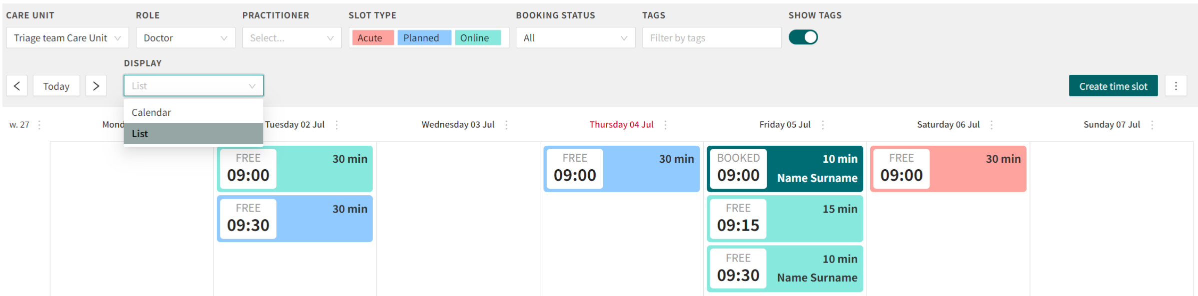


When creating time slots, it is important to enter the correct details in the filtering options in the upper part of the workspace to ensure that the correct time slot type is added to the correct care unit and for the correct role. Start by looking in the top section where you see the headings: *Care unit, Role, Practitioners, Slot type, Booking status, Tags.*

- **Care unit:** Make sure that you have selected the care unit in question. Some organizations have only one clinic and thus only one selection, while other care units may have different clinics, and it is therefore very important not to confuse them.
- **Role:** Here you can select the role (profession) for which to view and create time slots.
- **Healthcare practitioners:** Here you should select "All". Currently it is not possible to schedule a time slot for a specific person with whom the patient can choose to make an appointment.
- **Slot type:** There are three different time slot types: *Acute, Planned, Online.* You can select the time slot type you want to see here.
  - **Acute** refers to physical time slots that patients can book when they have been triaged to require an urgent physical consultation.
  - **Planned** also refers to physical time slots that patients can book when they have been triaged to require a booked consultation.
  - **Online** refers to time slots that patients can book when they have been triaged to require an online consultation. Healthcare practitioners can also book a time slot for patients using online appointments posted in the **Time slots** workspace.
- **Booking status:** Here you can filter to see *All, Booked,* or *Free* time slots.
- **Tags:** Tags can be added to time slots to decide which time slots should be shown to the patient. Tags can be "earmarked" and reserved for different types of patients or conditions (e.g., first time visit or re-visit).

  You can select tags by a predefined set of tags when creating a new time slot. You can filter by tags when booking a scheduled appointment in Clinic.

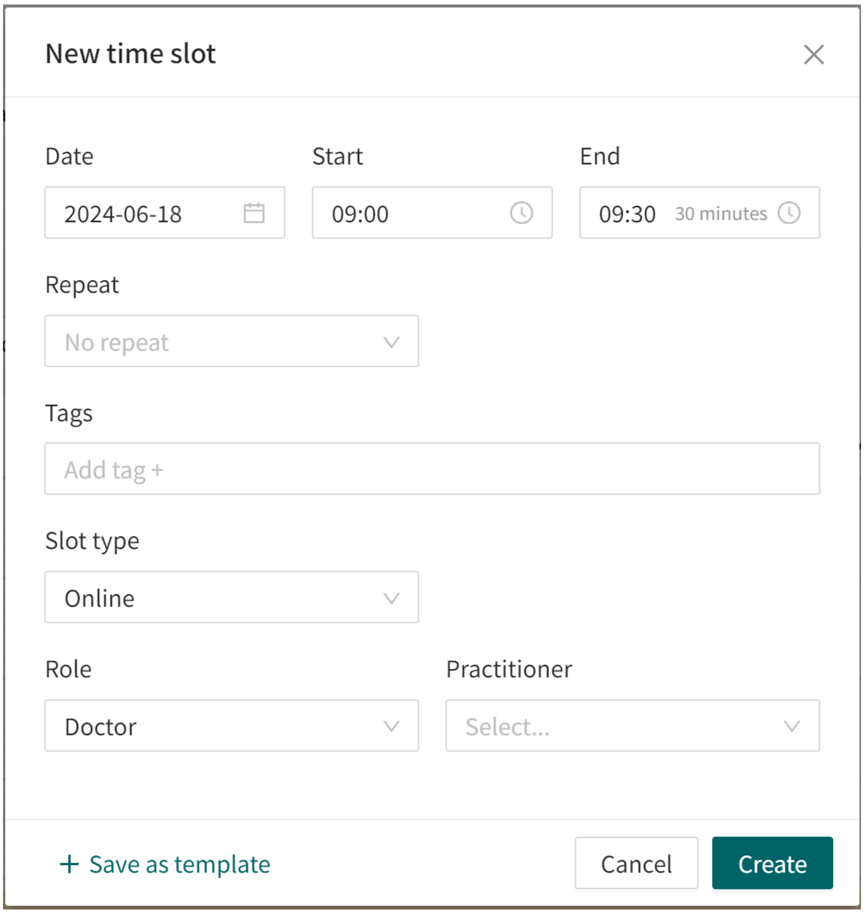
- **Display:** Here you can switch to a **List** view to better see the start times and duration of the scheduled time slots. This is especially useful when you have many time slots starting at the same time.



10.11.1. Create time slots in the Time slots workspace

Once you have selected your filtering options in the **Time slots** workspace, you can start creating time slots. The created time slots can then be booked by a practitioner or a patient.

To create time slots you can click the **Create time slot** button and enter the date and time and the rest of the desired settings in the dialog.

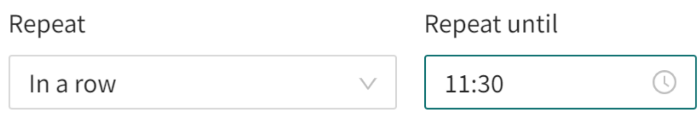


If you want to repeat the time slot, select the desired frequency in the **Repeat** drop-down list. The options for repeat are:

- **Daily**
- **Weekly**
- **Monthly**

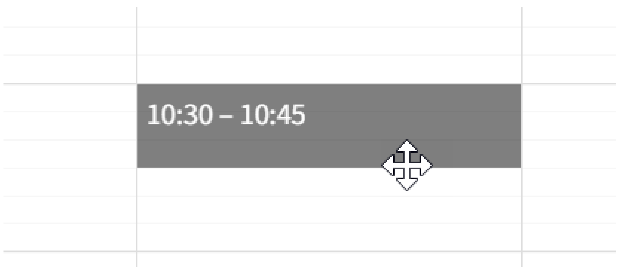
- **In a row**

When using the **In a row** option, a **Repeat until** field will be displayed in the dialog. When using this option, the time slots are added after each other in a series until the entered end time.



IMPORTANT
If you add a range of time slots for weekends/holidays, these time slots will be available. The system does not detect if the clinic is closed.

You can also create a time slot by place the mouse at the start time in the calendar. Then either single-click to open up the **New time slot** dialog, or click and hold and scroll down to the end time of the appointment (see image). After you release the mouse pointer, the **New time slot** dialog will open.



In the **New time slot** dialog, you can verify if the time was correct or adjust the time slot/time slot type if necessary.

10.11.2. Deleting a time slot in the Time slots workspace

You can delete a time slot you have set up by clicking on the time in question and clicking **Delete bookable time** in the next step.

The following applies to time slots that are not booked for a certain time before the start time automatically expires:

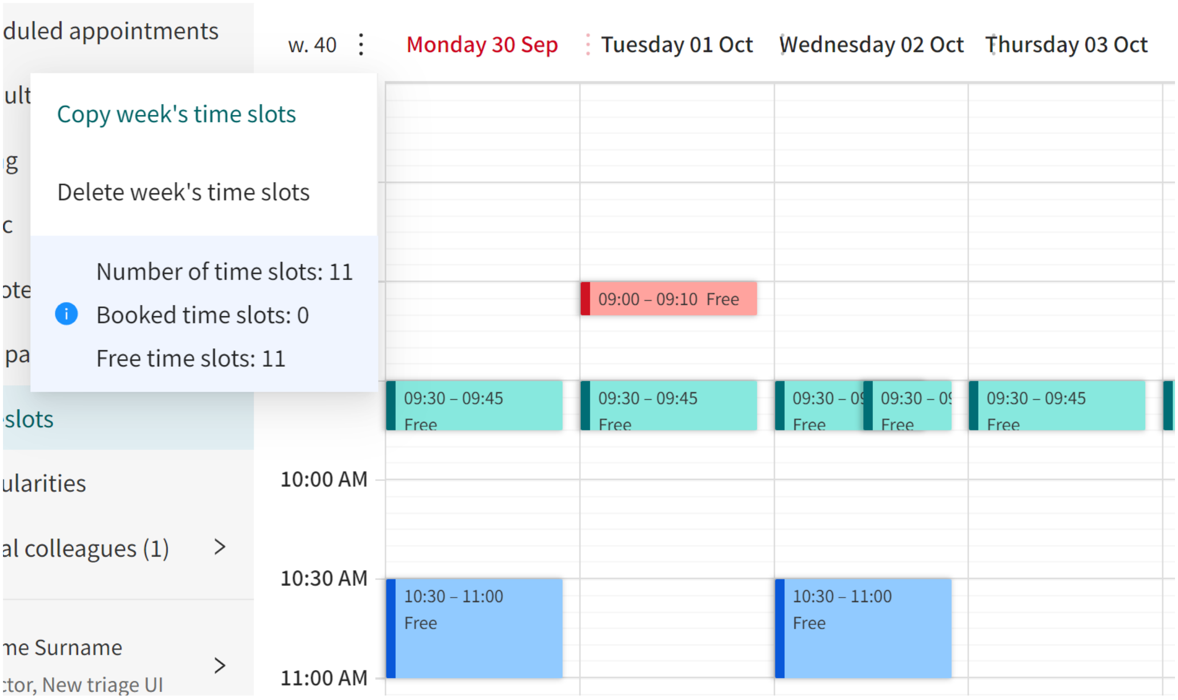
- **Online**: Expires 5 minutes before start time if not booked
- **Emergency**: Expires 3 hours before start time if not booked
- **Scheduled**: Expires 72 hours before start time if not booked

10.11.3. Copying time slots

Using the copy/paste feature, it is easier to add many time slots in one go. It is also easier to repeat the same schedule for several days and/or weeks.

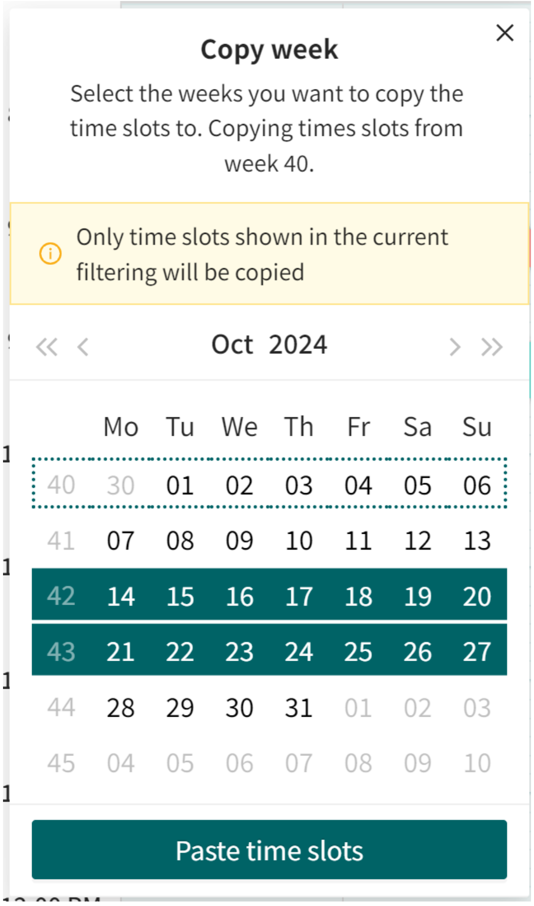
To copy time slots:

1. Click or hover over the three dots next to the date or the week number.
2. Select **Copy day's time slots** or **Copy week's time slots**.



3. Select the day(s) or week(s) you want to paste the selected day or week to.

NOTE
You are only copying the time slots shown in the **Time slots** workspace, which are dependent on the current filtering.



4. Click the **Paste time slots** button. The booked time slots will be pasted as available ones when copying time slots.

> **NOTE**
> When pasting the time slots into another day/week, it will not be taken into account if there are other time slots at the same time (i.e., scheduling conflicts).

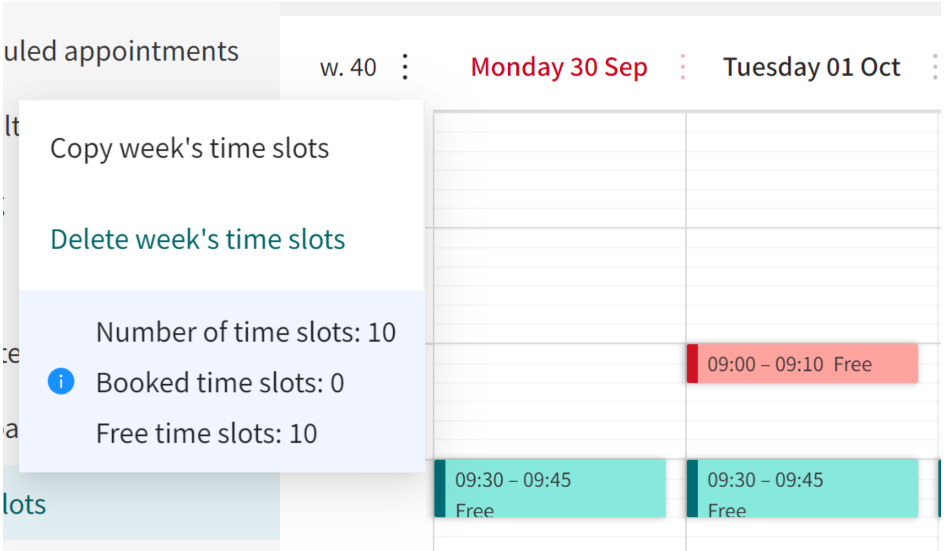
10.11.4. Deleting several time slots

In addition to being able to delete a single time slot or a time slot series (created by using the “repeat” functionality), you can also delete time slots from a day, week or time range.

To delete time slots from a day or week:

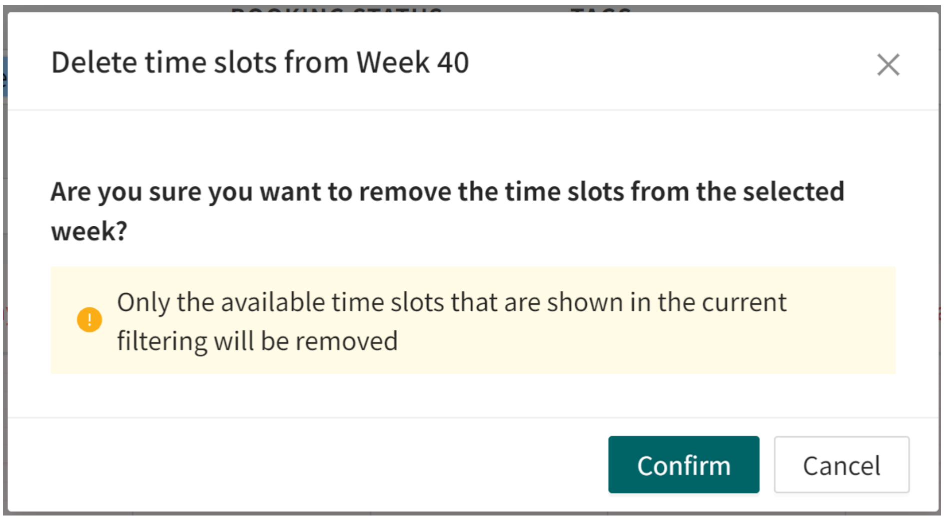
1. Clicking or hover over the three dots next to the date or the week number.

2. Select **Delete day's time slots** or **Delete week's time slots**.



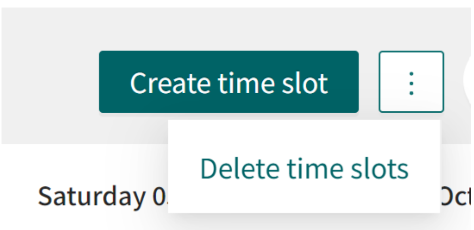
3. Confirm the deletion by clicking **Confirm**.

> **NOTE**
> Only the available time slots that are shown using the current filtering will be deleted.



To delete time slots from a time range:

1. Click on the three dots above the calendar view to the right and select delete time slots.
2. Select the time range in which you want to delete the time slots.



3. Confirm the deletion by clicking **Confirm**.

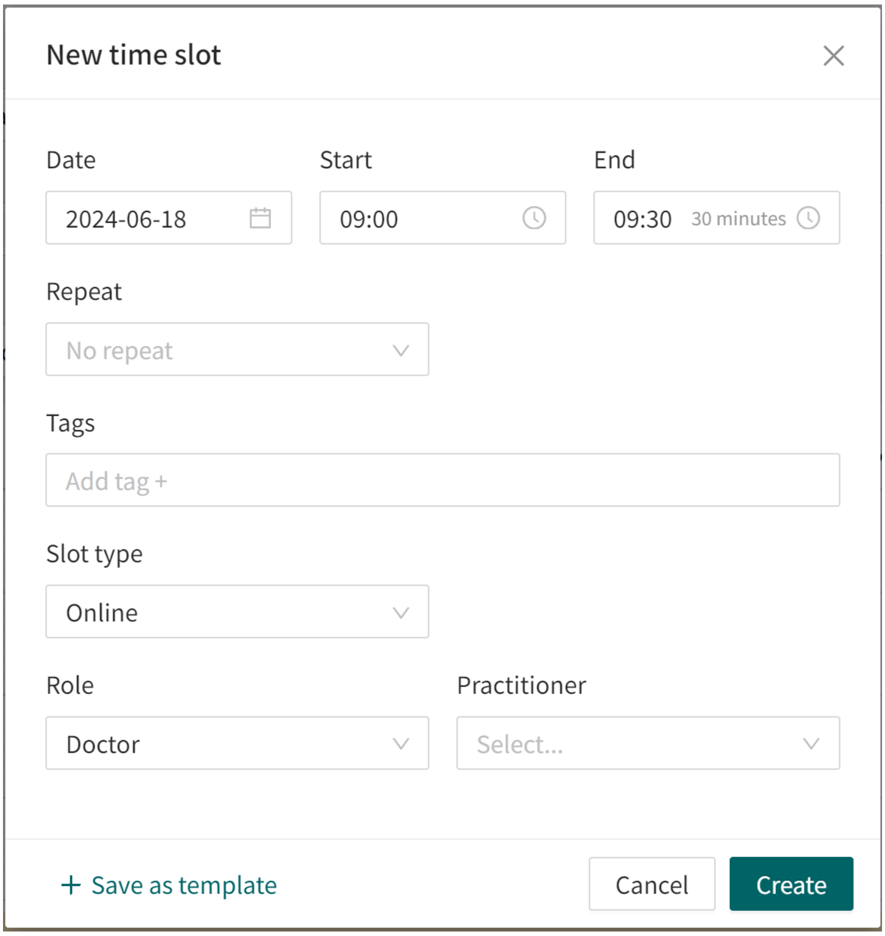
> **NOTE**
> Only the available time slots that are shown using the current filtering will be deleted.

10.11.5. Creating and managing time slot templates

Time slot templates will enable you to create time slots using prefilled templates. In the templates you can specify duration, tags, time slot type, role and practitioner. The time slots created by a template will be connected to the template, and you can then update the time slots by updating the template, instead of having to update every time slot.

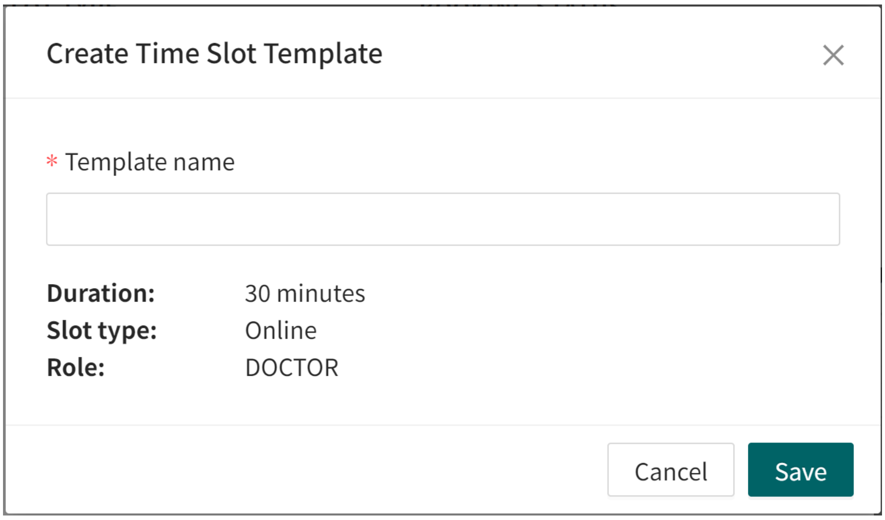
Create a time slot template

1. Click somewhere in the calendar or the **Create time slot** button to open the **New time slot** dialog.

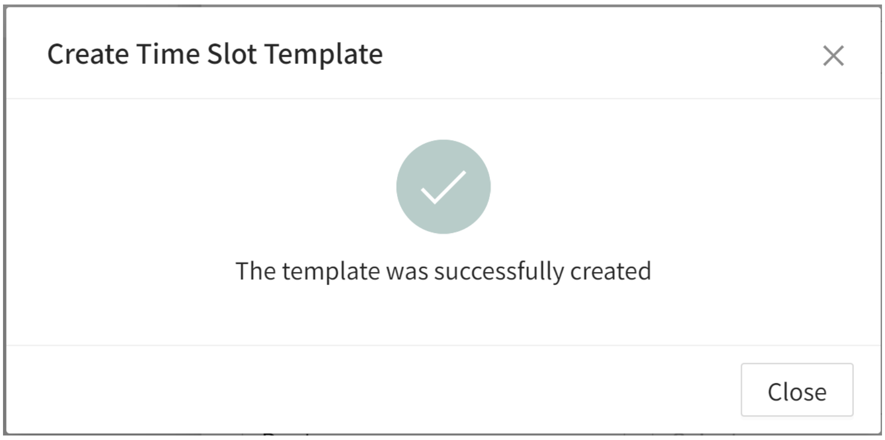


2. Add the template parameters (e.g, start time, duration, tags, slot type, role and practitioner).
3. Click **Save as template**.

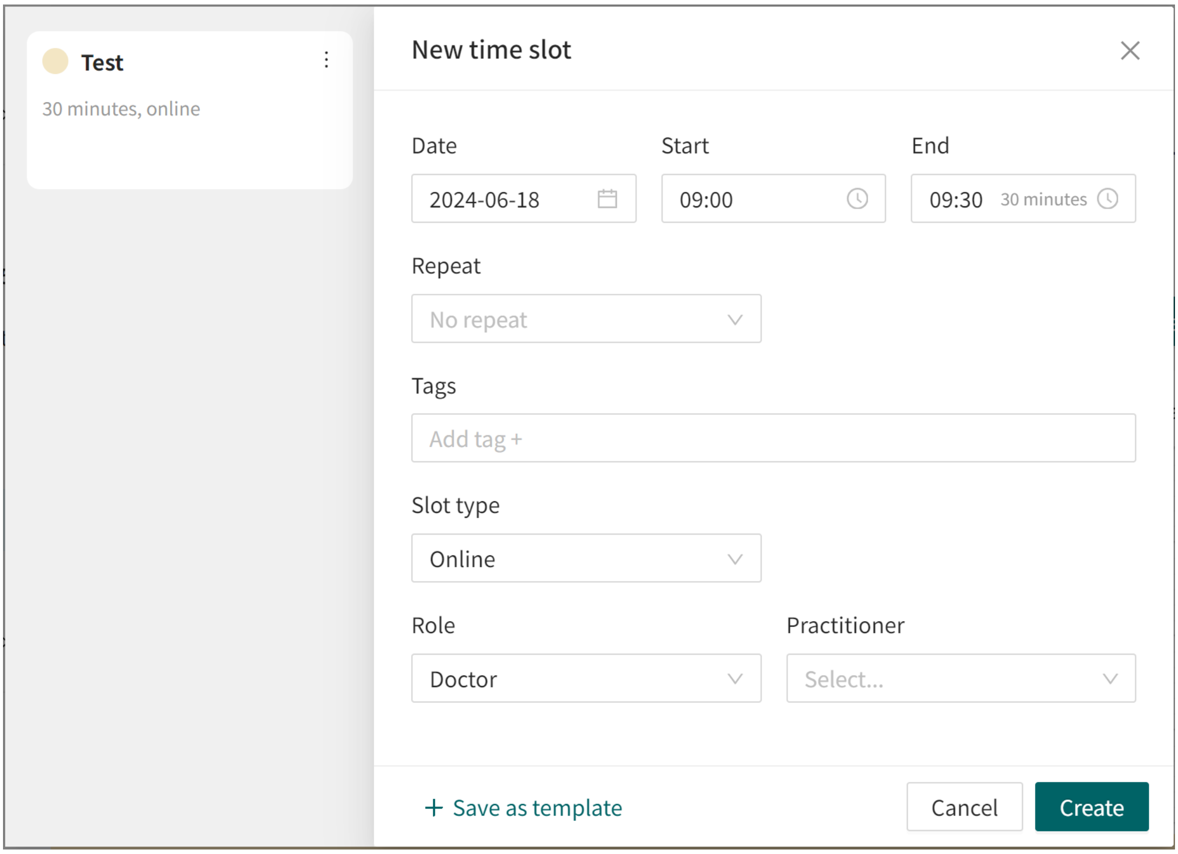
4. Give the template a name.



5. Click **Save**.
   A confirmation dialog will be displayed.

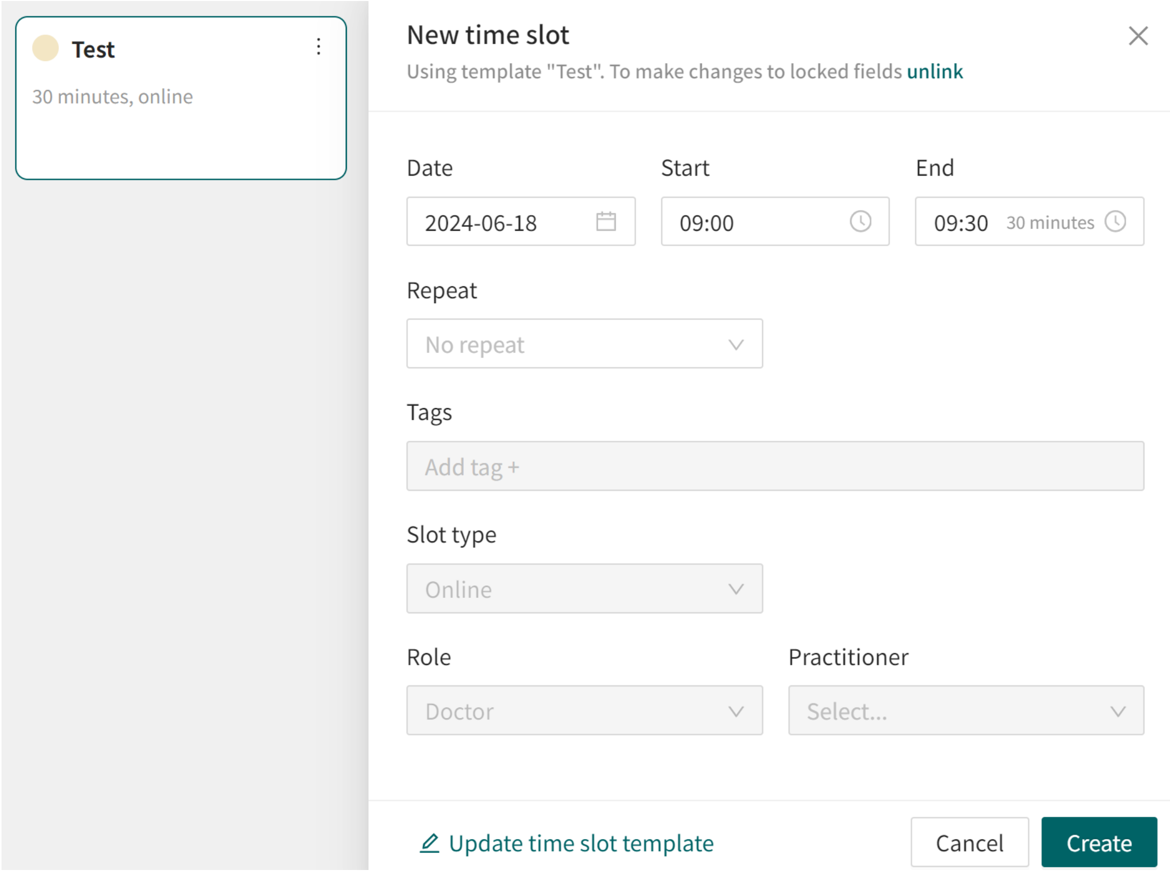


The template is now available in the **New time slot** dialog when creating a new time slot.



Create time slot with template

1. Open the **New time slot** dialog either by clicking somewhere in the calendar or by clicking the **Create new time slot** button.
2. Click on the template that you want to use. All templates are visible in the left column, and you can also search for the template name if there are more than 5 templates.



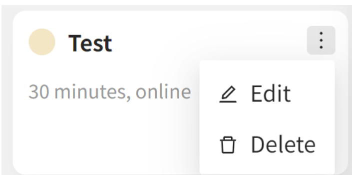
The time slot is automatically populated with the parameters from the chosen template.

3. Specify the date and time for the time slot.
4. Click **Create**.

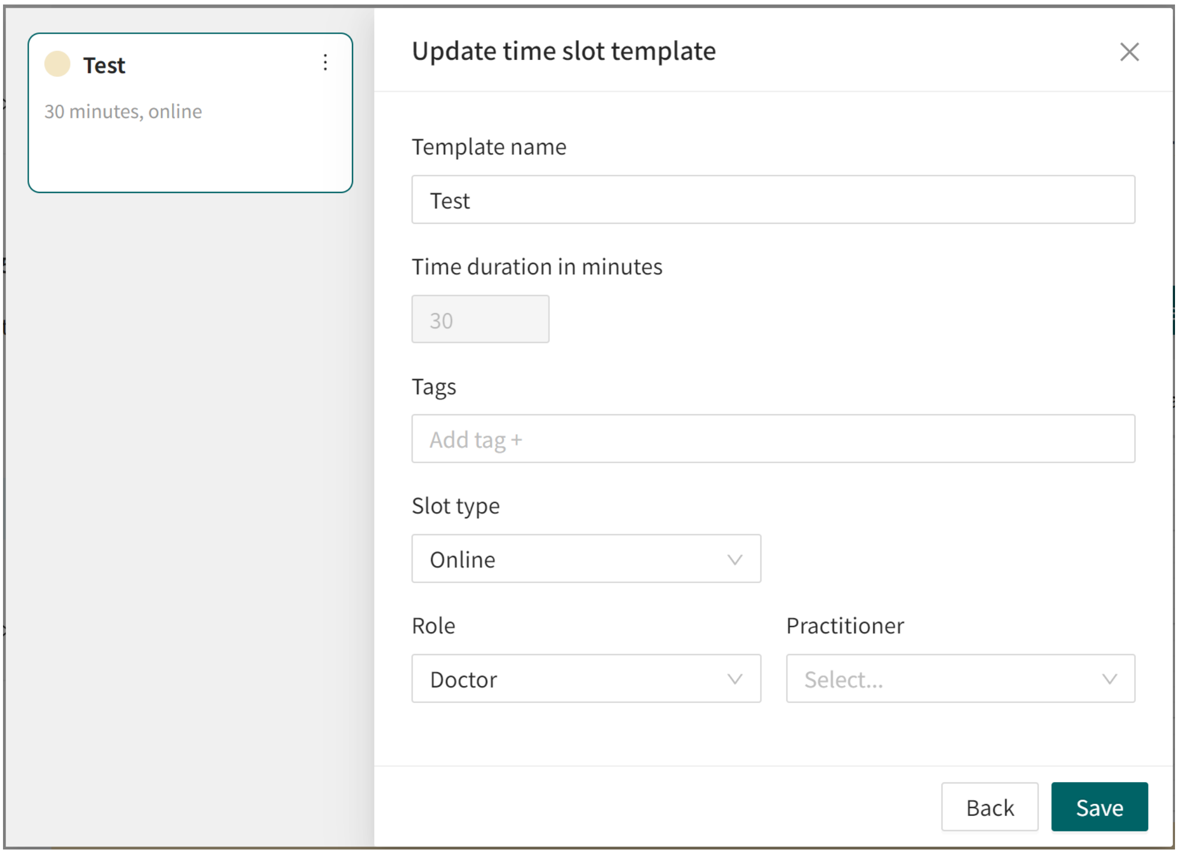
> **NOTE**
> If you want to edit the fields that are “locked” by the template, you first need to click **unlink** in the upper part of the dialog. The fields will still be populated, but can be edited for the specific time slot.

Edit a time slot template

1. Click the three vertical dots and select **Edit**.

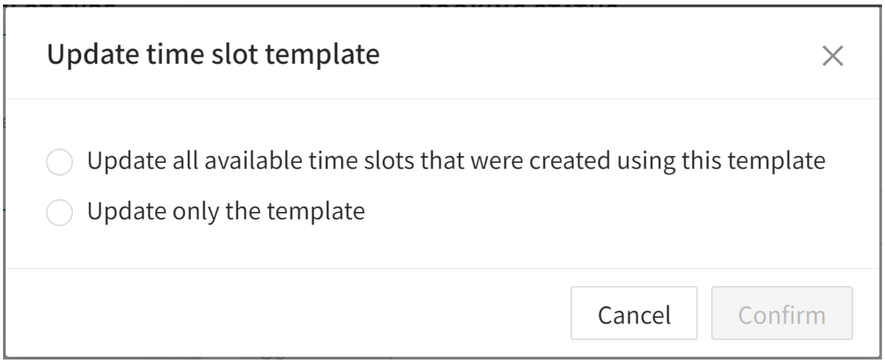


2. The **Edit** alternative will allow you to update and change your template. The duration is not possible to change due to risk of scheduling conflicts. Click **Save** when you are done.

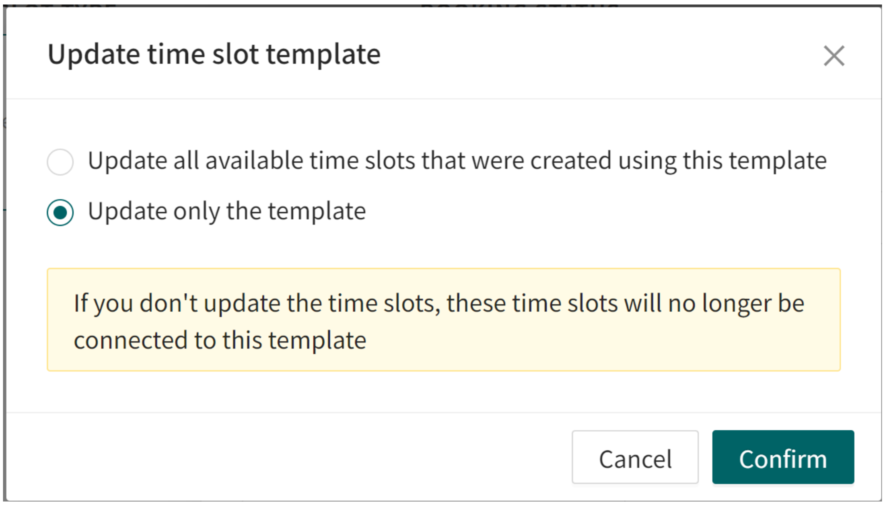


3. After clicking **Save** you now have a choice between:
   - Update all available time slots that were created using this template
   - Update only the template

NOTE
If you choose to only update the template, the existing time slots that were created using this template will be disconnected from the template.

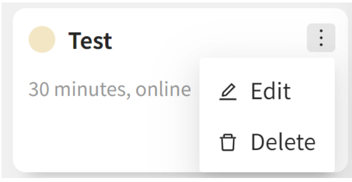


4. When you have chosen one of the alternatives, click **Confirm**.



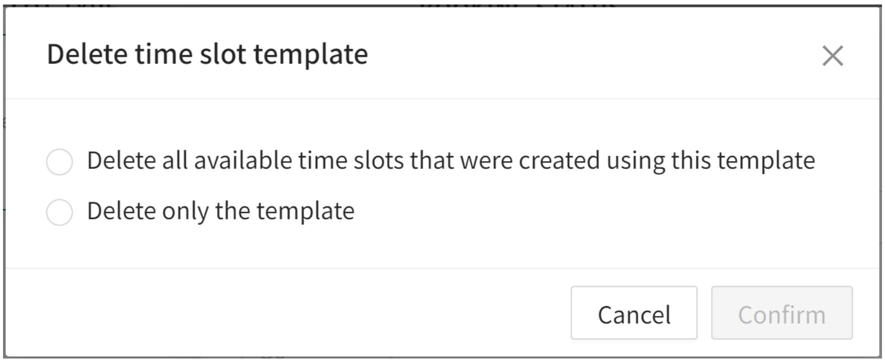
Delete a time slot template

1. Click the three vertical dots and select **Delete** the template.

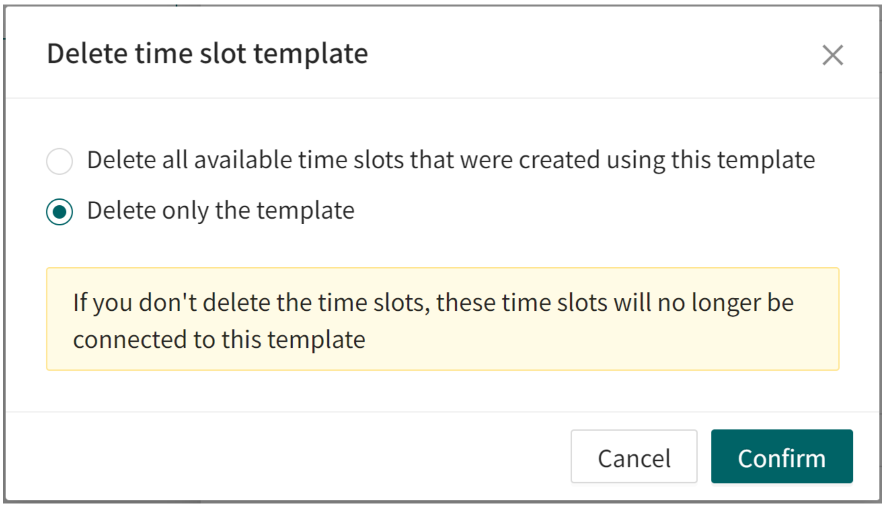


2. The **Delete** alternative will allow you to remove the template from the left column. When using this alternative you have a choice between:
   - Delete all available time slots that were created using this template
   - Delete only the template

NOTE
If you choose to only delete the template, the existing time slots that were created using this template will be disconnected from the template.



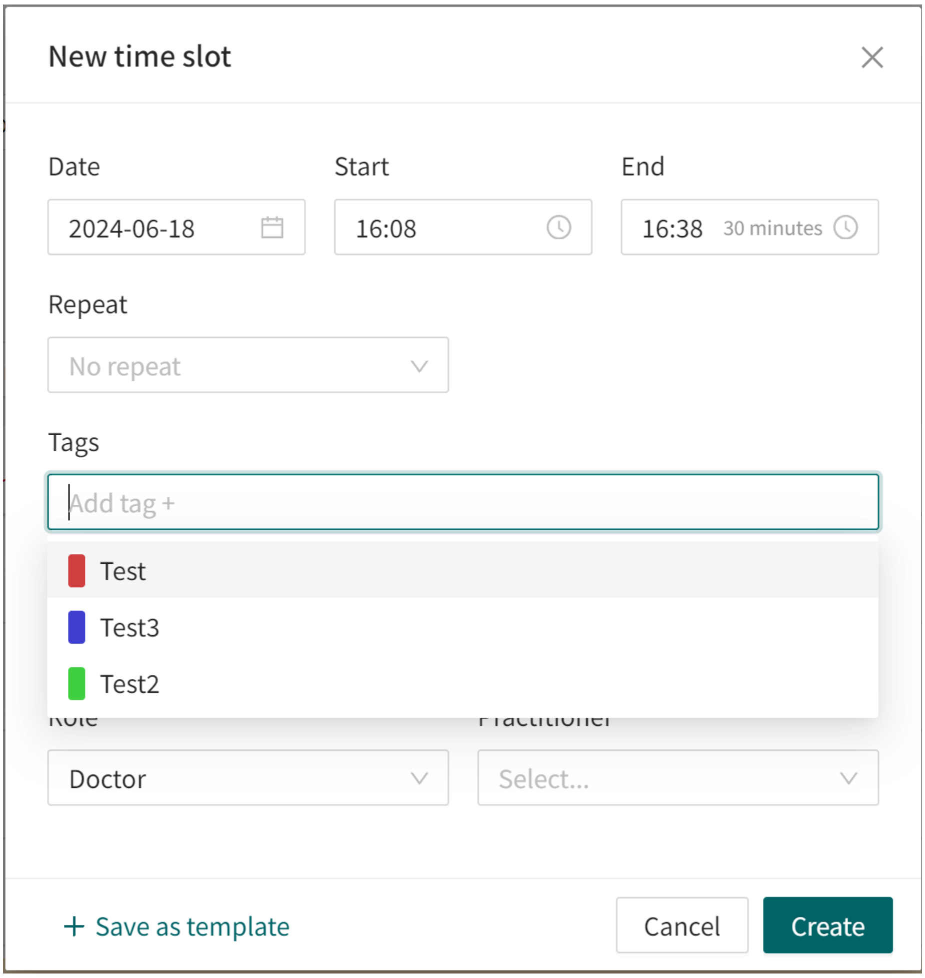
3. When you have chosen one of the alternatives, click **Confirm**.



10.11.6. Using tags in time slots

Tags can be attached to a time slot when it is created. This makes it easier for granular routing to specific time slots for patients when booking a time slot. The tags can have different purposes depending on the configurations.

When creating a new time slot you can select one or more predefined tags. These tags will then be connected to the time slot.



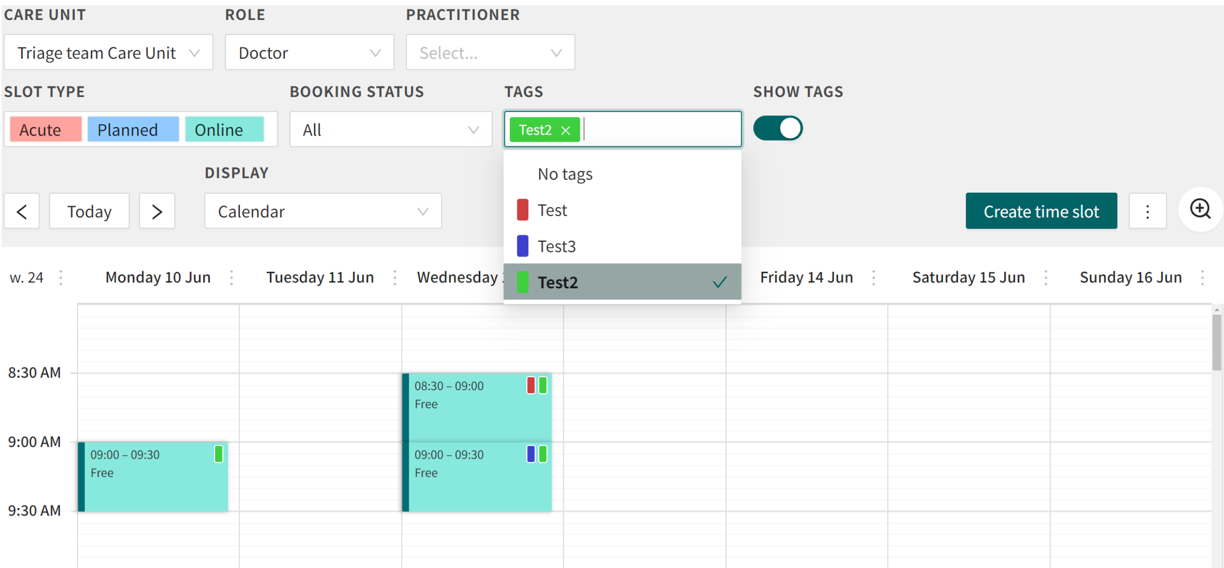
Tags can be used to decide which time slots should be fetched and shown to the patient. This can be used by the patient in the following cases:

- When booking a time slot after triage
- When booking a time slot via a menu item
- When booking a time slot through a booking ticket

NOTE
The tags will not be visible to the patients.

The tags are visible in the overview of time slots in the calendar view. Time slots are marked with colors and a tag name to easier get an overview over what time slots have which tags.

All time slots with and without tags are visible in the calendar view by default. Select one or more tags in the **Tags** drop-down list to only show time slots with these tags in the calendar view. The **Show tags** slider toggles the visibility of the tags on and off.

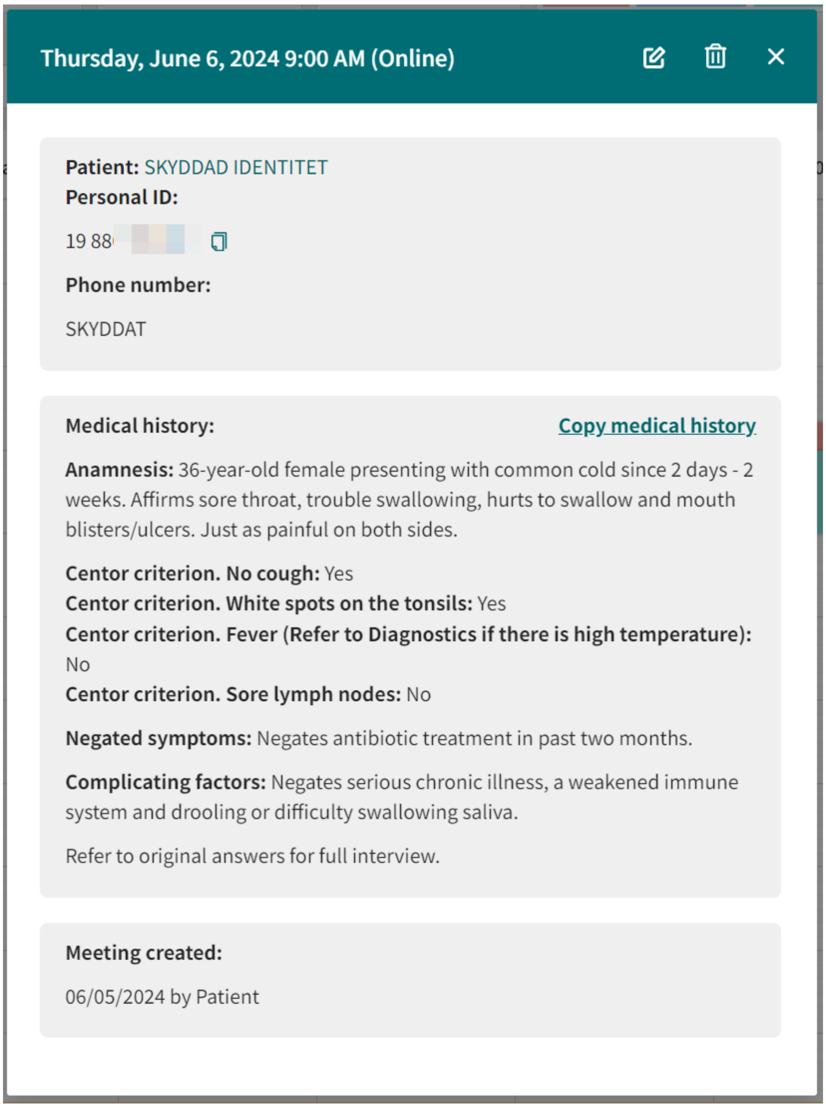


10.11.7. Copying appointments to your external booking system

When a patient has a booked appointment in **Time slots**, the appointment could also, if desired, be transferred to your "external" booking system, for example an EHR-system.

This is done as follows:

1. Click on the booking in question in the **Time slots** view to open the following display.



2. Start by copying the **Personal ID** by clicking the Copy icon.

3. Open your regular medical record and paste the **Personal ID**.
4. Book the patient in the usual way in your external booking system with the healthcare practitioners who will receive the patient.
   - For *online* time slots, it is recommended, for instance, that you enter in the booking details: Reason for seeking care + log in to Clinic to receive the patient.
   - For *physical* time slots, it is recommended, for instance, that you enter in the booking details: Reason for seeking care + please see daily note, DD/MM/YYYY, for the patient's own medical history.

If healthcare practitioners receive patients in person, it is unlikely they will log into Clinic to access any medical history. To help the healthcare practitioners with physical appointments, it is recommended that someone (often administrative staff) transfers the patient's medical history drawn up during the triage to your regular medical records system.

- Click **Copy Medical history** (see image above), then open a daily data entry in the regular medical records system for the patient and paste in the data. It is a good idea to add a heading to the data entry, such as the *patient's own medical history*.

10.12. Irregularities

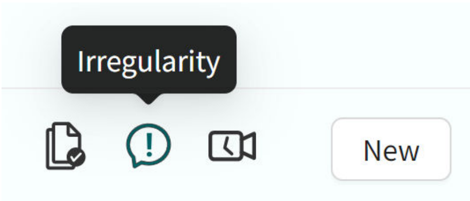
An irregularity is any incident or other occurrence that has led, or could have led, to harm to health. This can arise, for example, through incorrect assessment of whether the patient case is suitable for online care or not, missing documentation in connection with the patient appointment or an incorrect prescription. An irregularity may also be inappropriate behaviour by staff, patients or relatives.

If your organisation has enabled the **Irregularity** function, all users can report irregularities, but only a small group can receive and manage them.

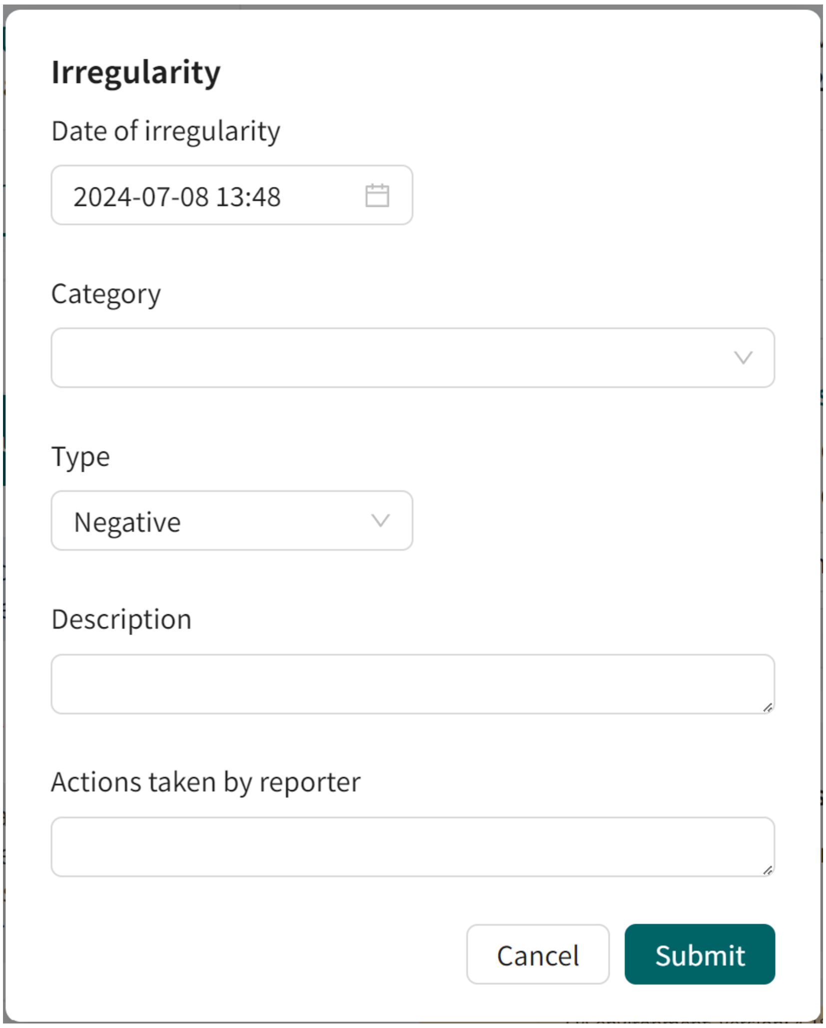
10.12.1. To report irregularities

Irregularities are reported from the **Irregularity** icon during a patient appointment.

1. Open the current patient appointment.
2. Click on the **Irregularity** icon.



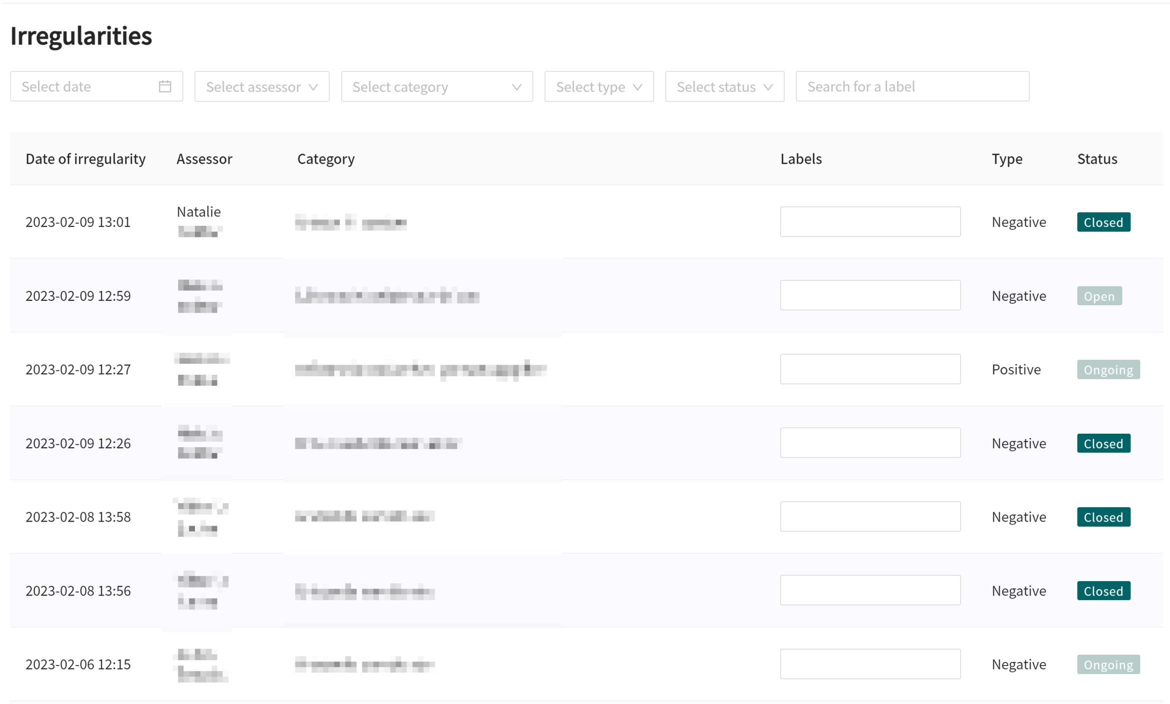
3. Fill in the relevant information.



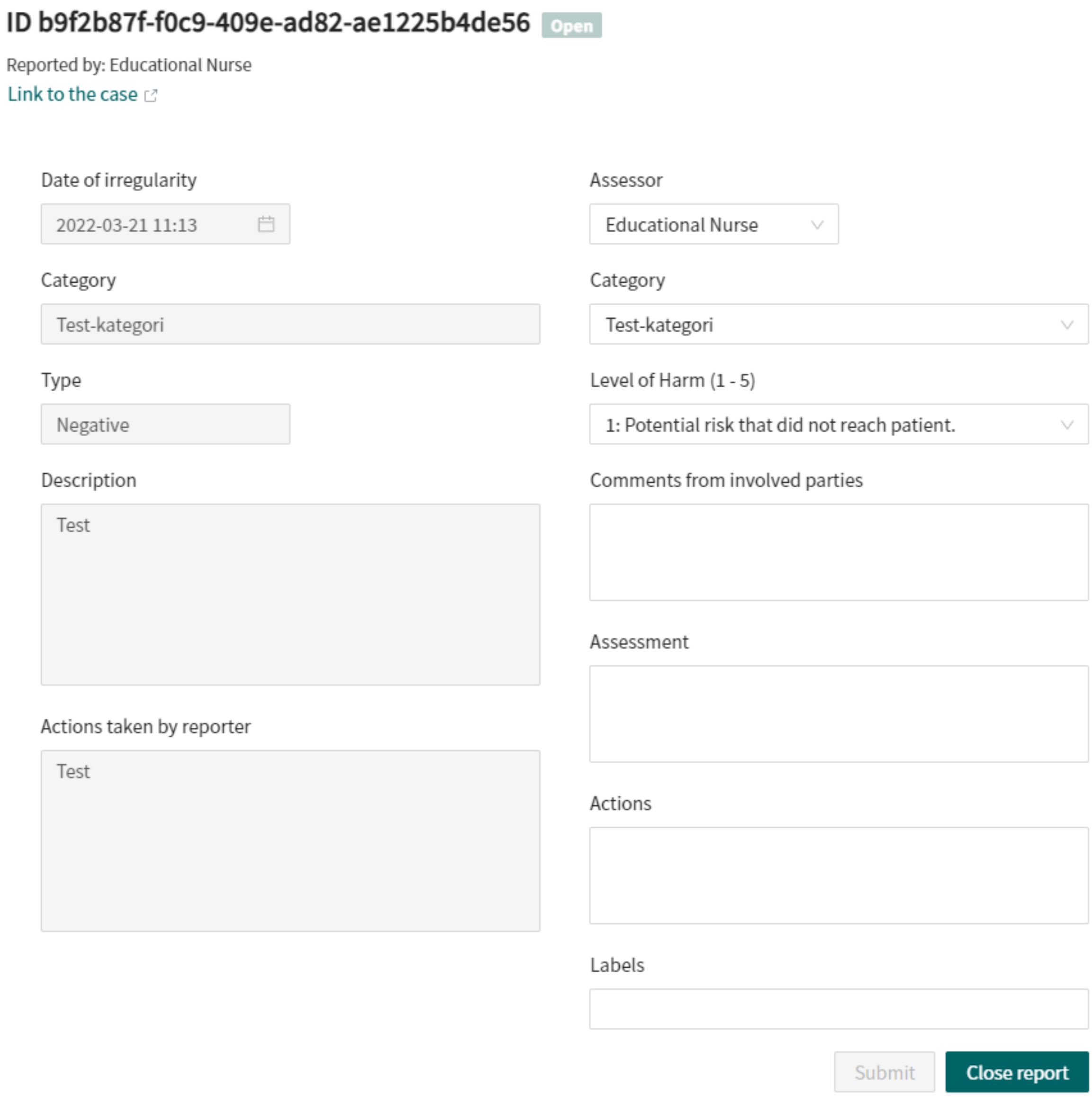
4. Click **Submit**.

10.12.2. To read and manage irregularities

1. Click on the **Irregularities** heading in the main menu to go to the **Irregularities** view.



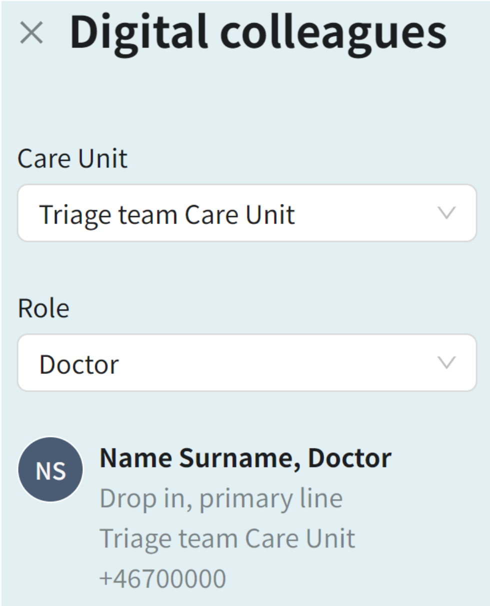
2. To assess an irregularity, click on the irregularity in question.



3. Fill in the relevant information and click **Submit**.
4. Click **Close report** to prevent further editing.

10.13. Digital colleagues

You can see here which digital colleagues are logged in to Clinic.

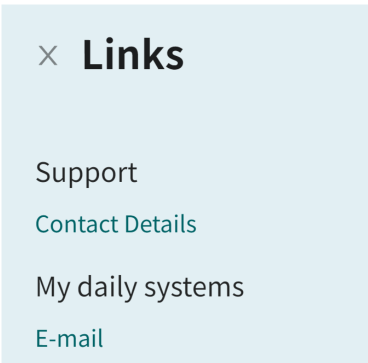


Care unit: You can select which care unit to display if your organization has more than one care unit.

Role: Here you can choose to see all colleagues or filter on colleagues with a role. The roles may vary from care unit to care unit.

10.14. Links

Here are links to resources that the healthcare practitioner has deemed useful to be aware of.



NOTE
This heading is only visible if your care unit has chosen to activate it.

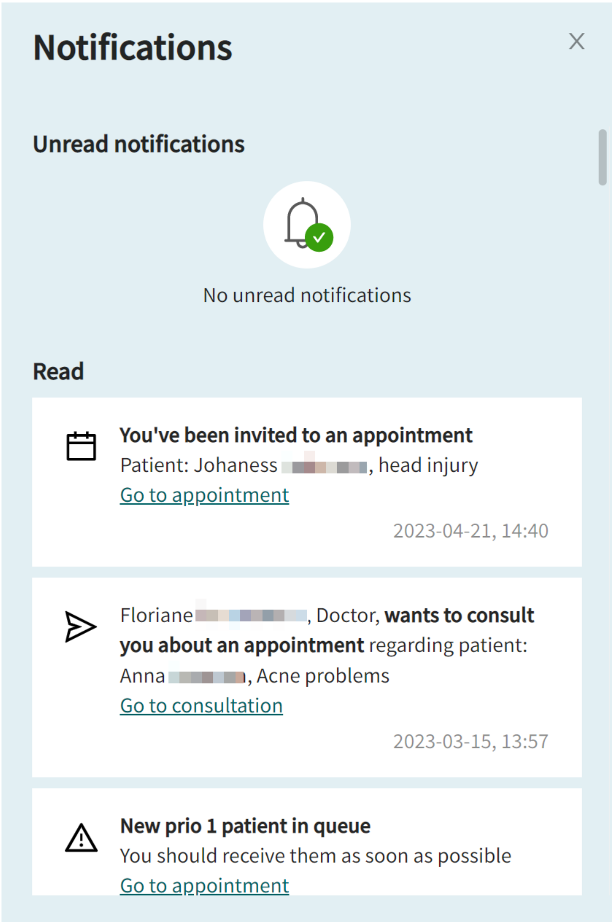
10.15. Notifications

Click **Notifications** in the main menu to open the **Notifications** list with all your notifications. The notifications are sorted in read and unread notifications.

Notifications are created for:

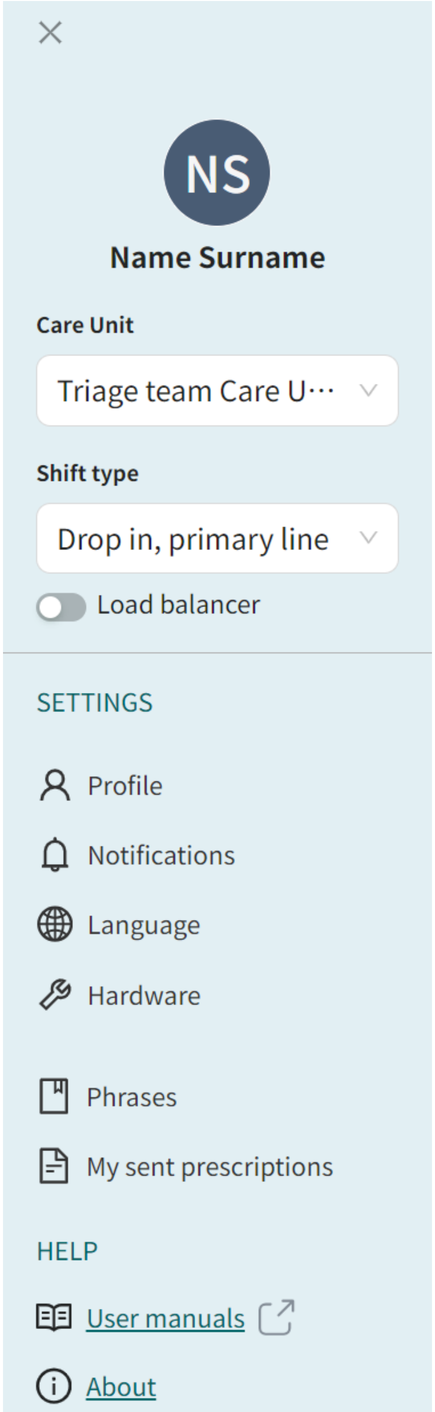
- High priority patients coming in via the drop-in list.
- Important actions related to an appointment (e.g., if you are invited to an appointment, or if someone has handed over an appointment to you)
- Important actions related to a consultation

You do not have to be logged in to Clinic in order for the notifications to be created. If you are not logged in when a notification is created, it will be visible when you log in again.



10.16. Your profile

Click on your name to open your personal settings.



- **Care unit**: The care unit you are logged in to.
- **Shift type**: Here you can select shift type; refer also to Start page [18]
- **Load balancer**: Enable if you are on duty to relieve colleagues when the unit is busy.
- **Profile**: Click on this to edit your profile (your name, title or contact details), see Profile [62].
- **Notifications**: Enables notifications of ***new asynchronous messages*** or ***new patients***.

A ***scheduled appointment*** notification notifies you 10 minutes before one of your scheduled appointment starts, and unlike other notifications this is also sent *even* if you don't have an active shift.

A phone/SMS notification **Test** link can be seen to the right of **Notifications**.

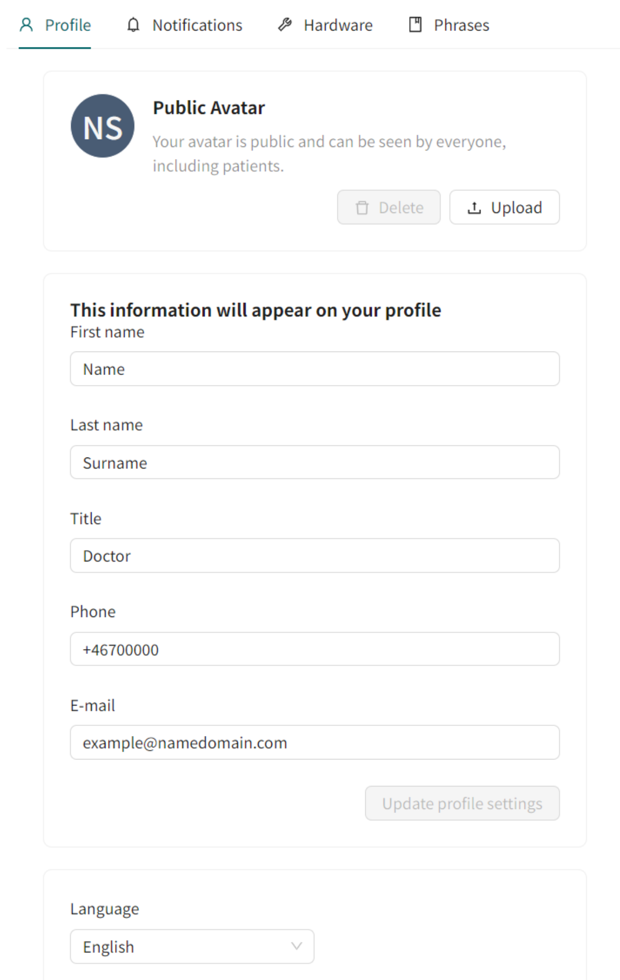
- **Language**: Specify the language you want to use in Clinic. Communication with the patient is not affected by this selection.
- **Hardware**: Test your hardware.
- **Phrases**: Manage personal phrases. See Managing personal phrases [63].
- **My sent prescriptions**: Lists your sent prescriptions.
- **User manual**: Link to the part of the Platform24 website where the Clinic User Manual can be found, as well as other User Manuals.
- **About**: Information about the products Triage24 and RPM24 and links to their User Manuals.

TIP

We recommend that you test these features before leaving your computer when you have time to spare.

10.16.1. Profile

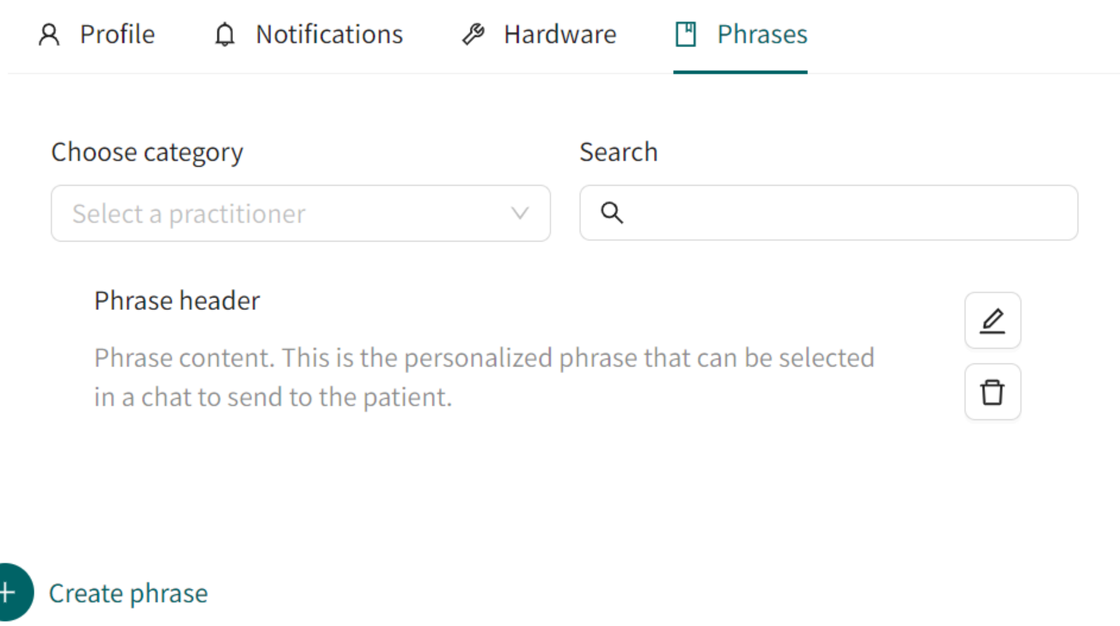
In the **Profile** tab, it is possible to edit your personal profile details.



10.16.2. Managing personal phrases

To manage phrases outside ongoing meetings and to create new phrases:

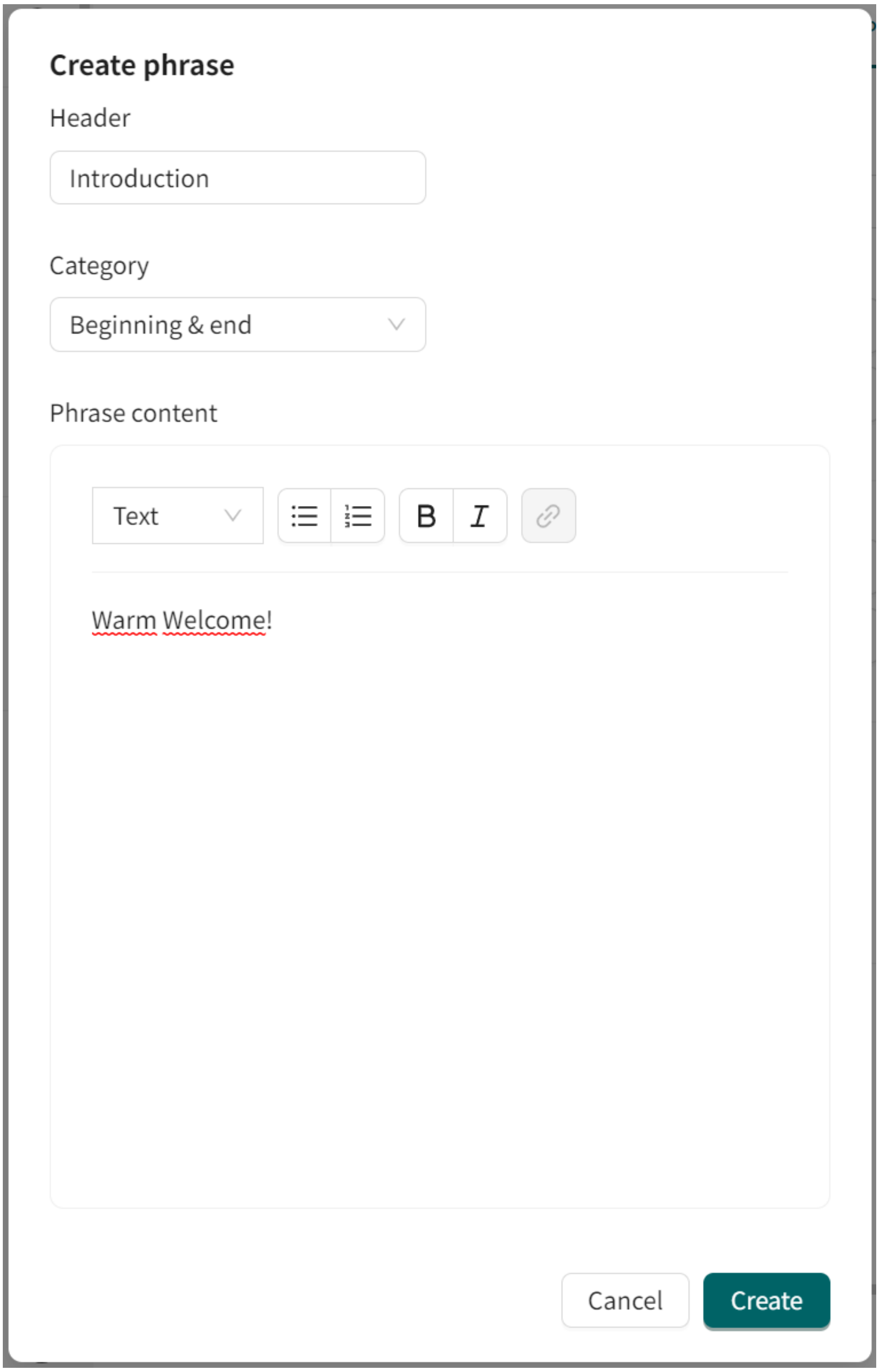
1. Click **Settings** and select the **Phrases** tab. It is possible to filter by phrase category (**Select phrase category**) or by free text search (**Search**).



2. Click on **Create phrase** in the bottom left corner to create a new phrase.

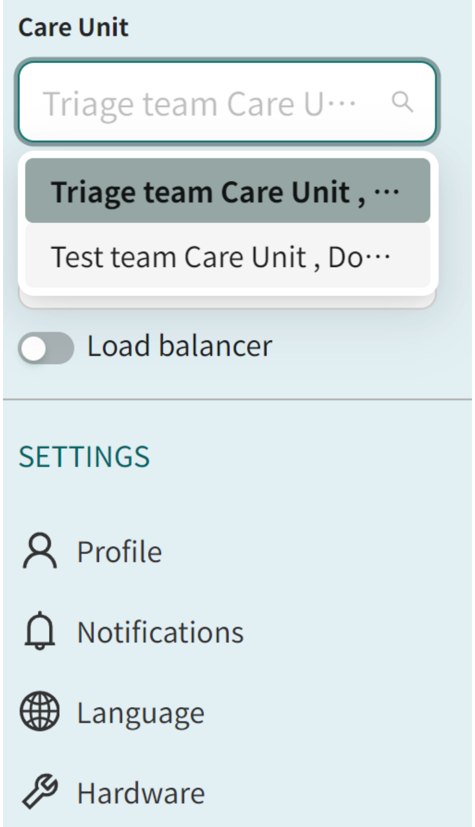
> **NOTE**
> Keep in mind that only the creator of the phrase will have access to it.

3. Enter **Title** and select **Category**. Type the phrase in the text box and click **Create**.

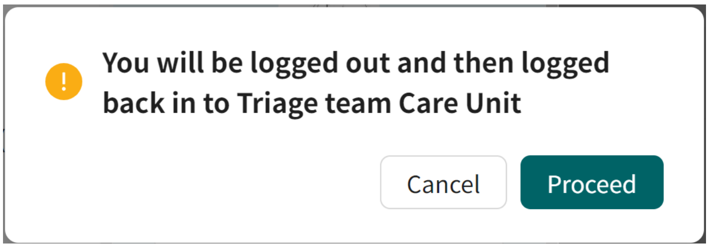


10.16.3. Change care unit

1. If you have several multiple roles, you can select the care unit/role from the list.



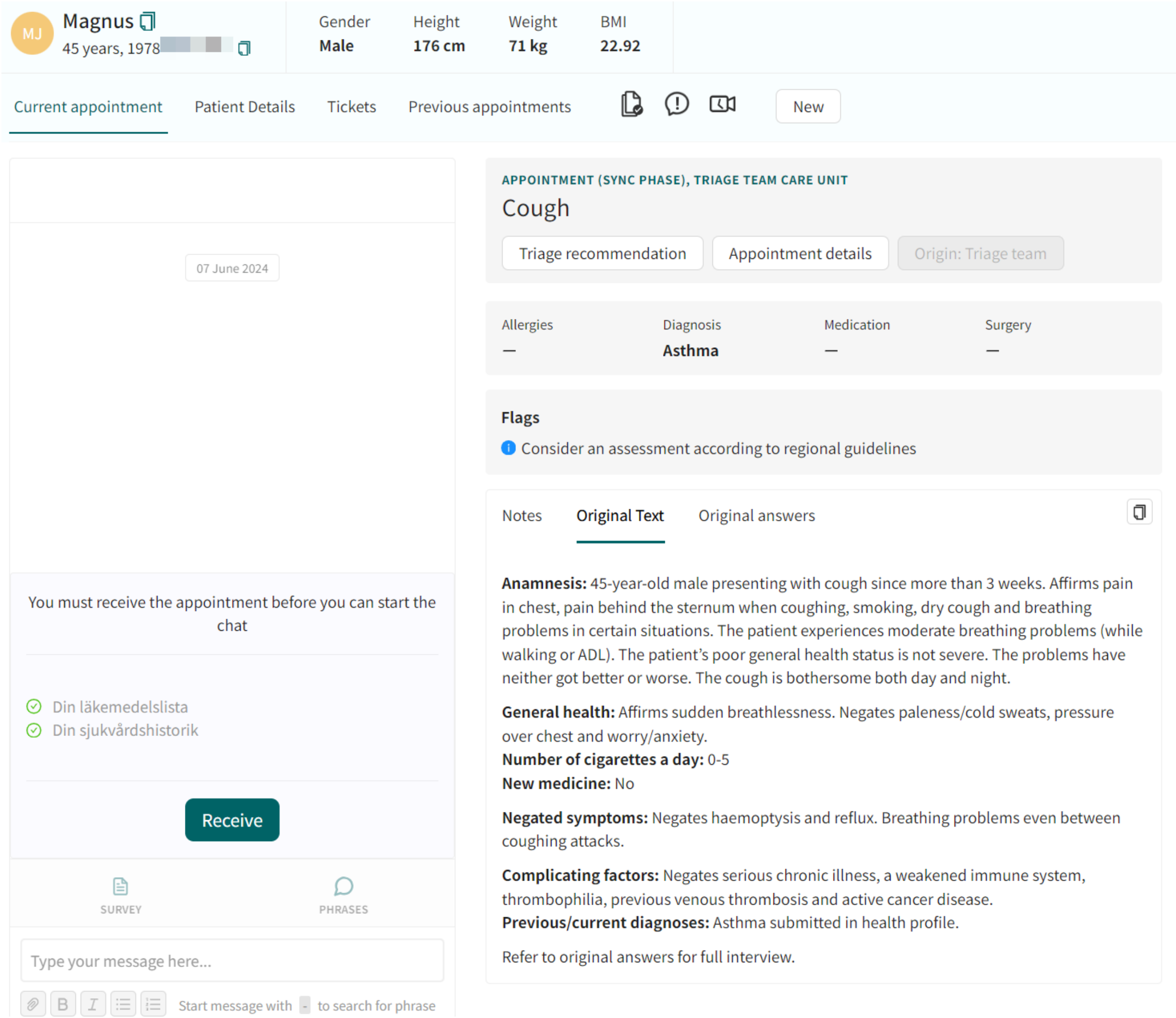
2. Select **Continue** - you will now be automatically logged out of your current care unit and logged in to the new one.



11. Appointments page

11.1. Overview

The appointments page opens when you receive an appointment or search for a patient. In the upper part there is a header with information about the patient and below it there are several tabs you can switch between, depending on the information you want to access.



11.2. Page header

The header contains the basic data for the current patient, indication of patient connection status as well as warnings and information about protected identity (if applicable).

Any warnings added for the patient are indicated by a red label. For more information about warnings and how to add them, see Warnings [85].

11.2.1. Basic data

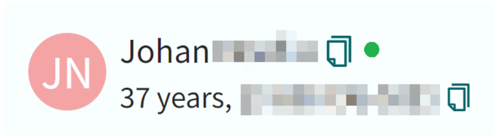
Shows the name, gender and age of the patient. Body measurements are displayed if the patient has filled in their health profile in the Patient app.

TIP

Use the Copy icon to copy information such as name or unique personal identifier.

11.2.2. Patient connection status

There is a circle to the right of the patient's name indicating the system is connected to the patient's device (computer/mobile/iPad).



NOTE

There may be a delay of about 60 seconds.

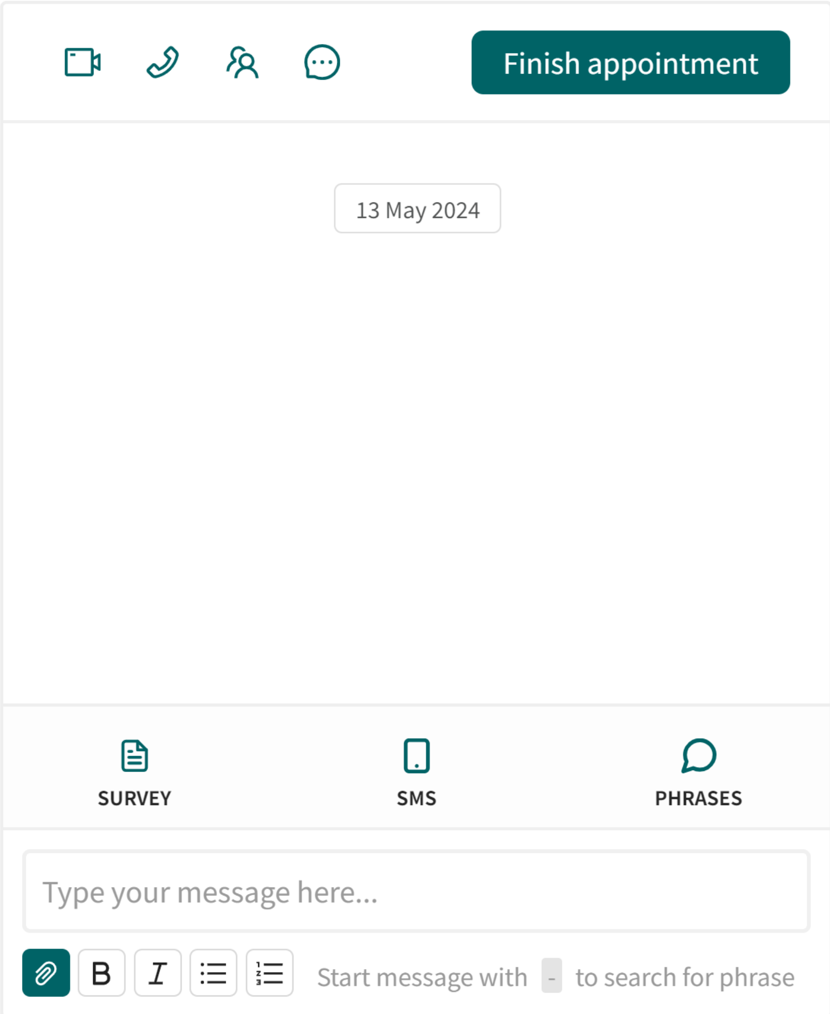
Table 1. Patient connection status - indicator colors

Color	Meaning
Green	The last contact with the patient was <12 seconds ago
Yellow	The last contact with the patient was 12-25 seconds ago
Red	The last contact with the patient was >25 seconds ago
Black	The visit is not active, or does not belong to you, so the information is not available

11.3. Current appointment

11.3.1. Chat module

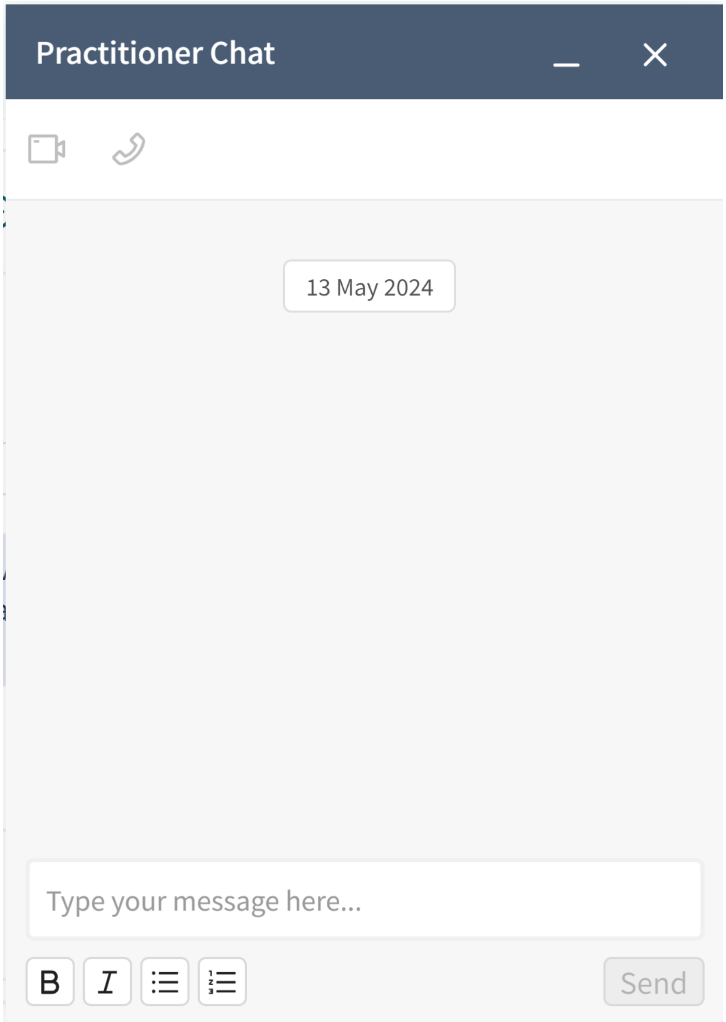
Appointments always start in chat mode. When you receive a synchronous appointment in the ledger and enter the chat module, there are no messages, only a button with the text **Start appointment**. The appointment begins when you click **Start Appointment**. When you start the appointment, an automated presentation is sent. You can then chat with the patient by typing in the **Type your message here...** field at the bottom. If you want to insert line breaks in a chat message, press *Shift+Enter*.



In the upper part of the chat module you can select to:

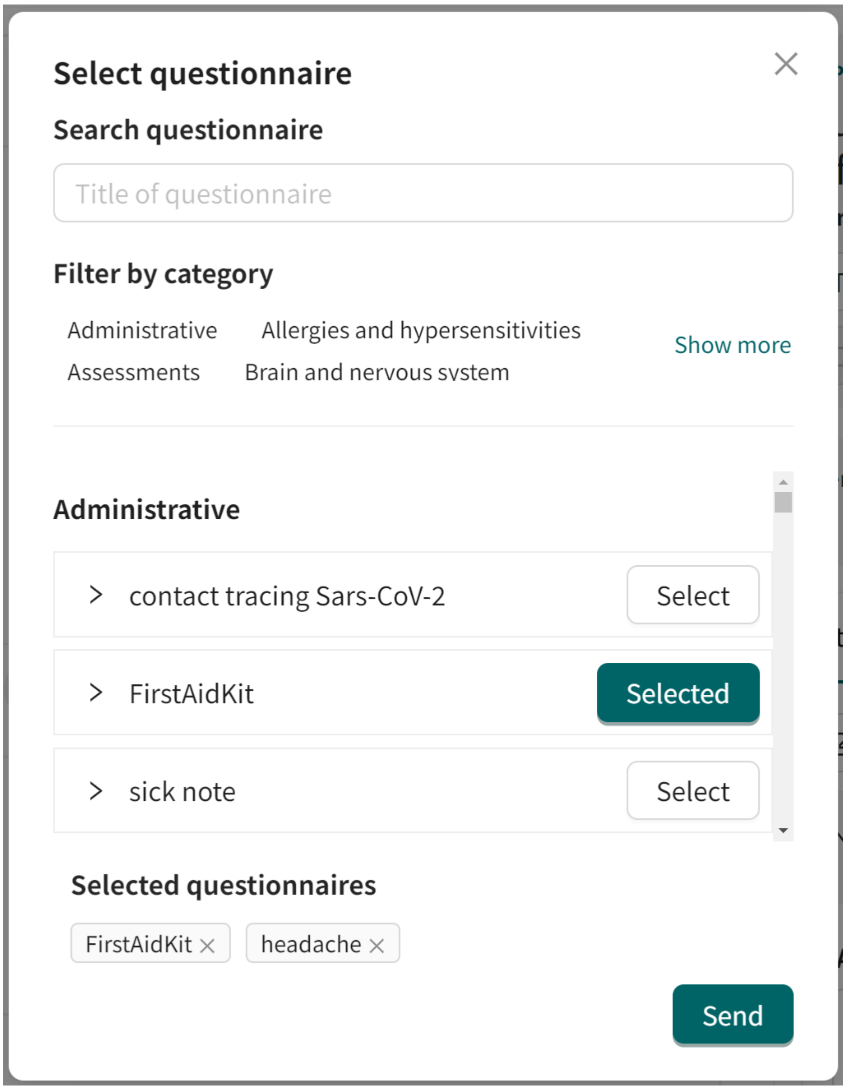
- Start video calls (camera icon). Ongoing and completed video calls are displayed with a message showing how long they took and who was in them. For more information about video calls, see Video calls [110].
- Start audio (handset icon)
- See who has been added to the chat, or to invite other practitioners to the patient chat (“twin” icon). For more information, see Inviting colleagues to patient chat [114].

- Start a practitioner chat with the practitioner(s) that have been added to the patient chat (chat icon). The practitioner chat will appear as a separate dialog, and these messages will not be visible for the patient. For more information, see Inviting colleagues to practitioner chat [115].



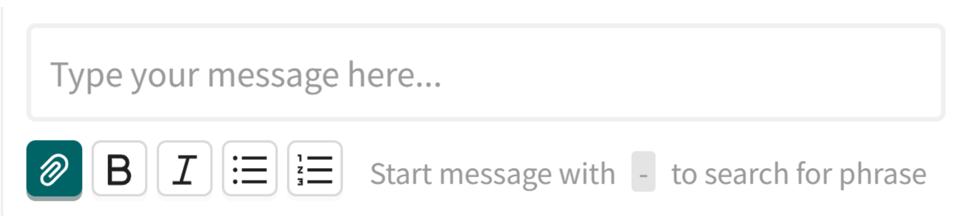
In the lower part of the chat module you can select to:

- Send a questionnaire to the patient (**Survey** icon).
  Clicking the **Survey** icon will open the **Select questionnaire** dialog. The questionnaires to select from can either be found in the different questionnaire categories, or by searching for a specific questionnaire in the search field. It is possible to view a description and preview the content of the questionnaire by clicking on the arrow next to the questionnaire title. Note that it is not possible to preview the dynamic triage questionnaires.



- Send an SMS to the patient (**SMS** icon).
- Use predefined phrases (**Phrases** icon). Note that for a practitioner to be able to add a new phrase, phrase categories must be set up in Manage by an administrator with the role Configuration administrator. For more information about adding phrase categories in Manage, refer to the Manage User Manual.

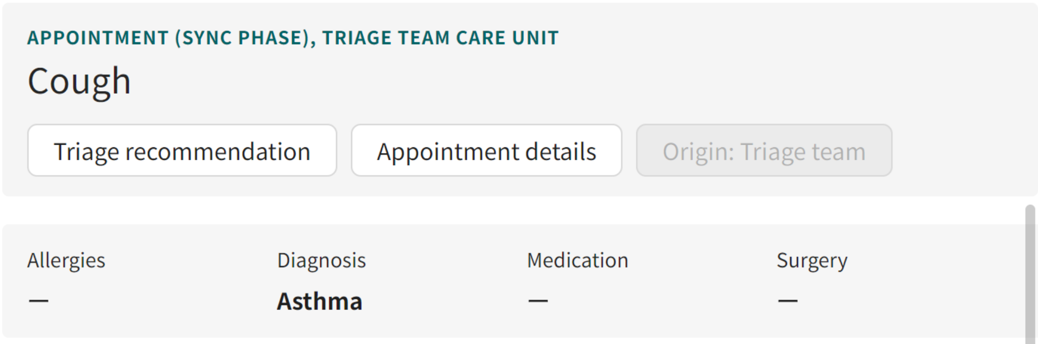
Below the **Type your message here...** field in the lowest part of the chat module, you can select formatting for the message or select to attach a file.



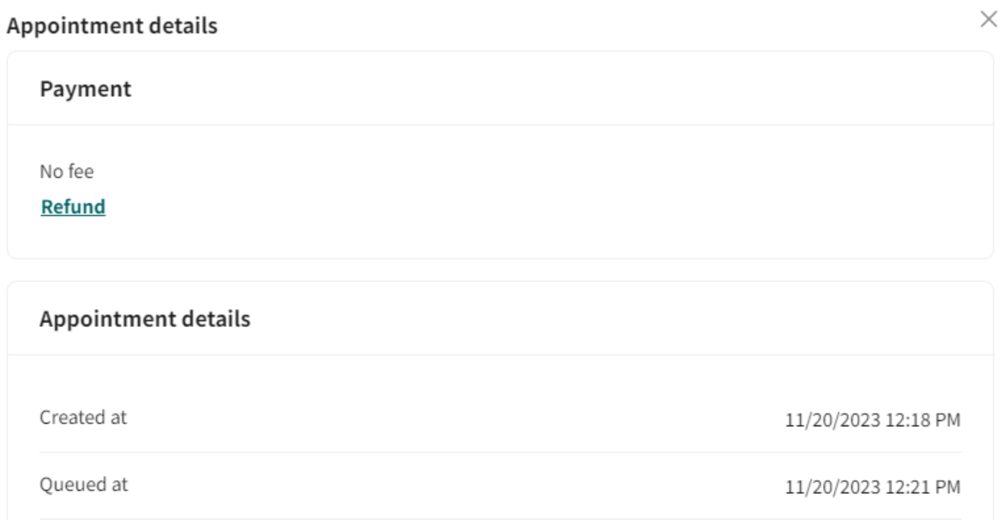
11.3.2. Appointment overview

The appointment overview shows important patient details such as allergies, diagnosis, medication and surgery. The appointment overview also shows technical details such as origin, triage result (if applicable) and non-medical information (e.g., appointment details, payment).

If the patient has performed a triage, the results can be viewed by clicking the **Triage recommendation** button.

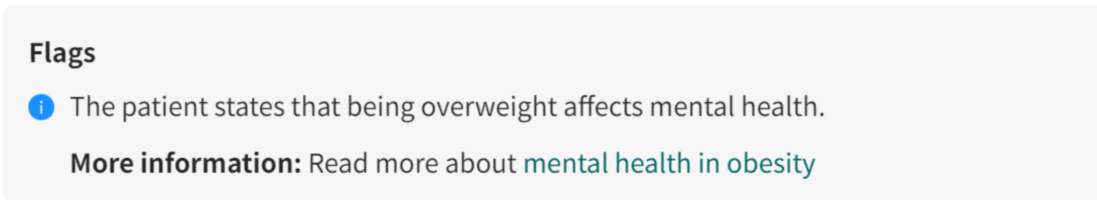


The appointment details can be opened by clicking the **Appointment details** button.



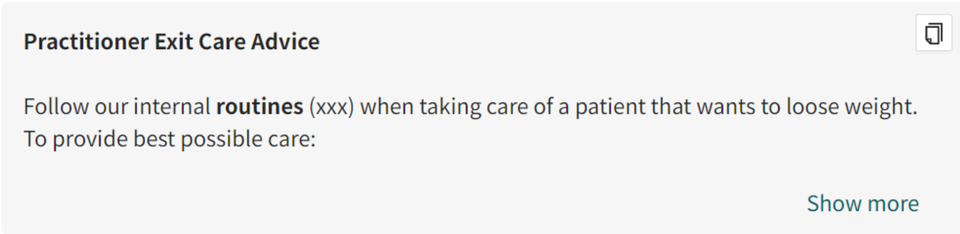
11.3.3. Flags

If the patient has any flags (i.e., additional information that can be relevant for the practitioner to be aware of) they will be displayed in a separate **Flags** section. Note that this section only will be visible if the patient has flags. When hovering over the "i"-sign, you can see if the flag was created by the patient via a patient or practitioner initiated questionnaire. If there is any additional information to display related to the flag, that information will be displayed under "**More information**" in the flag.



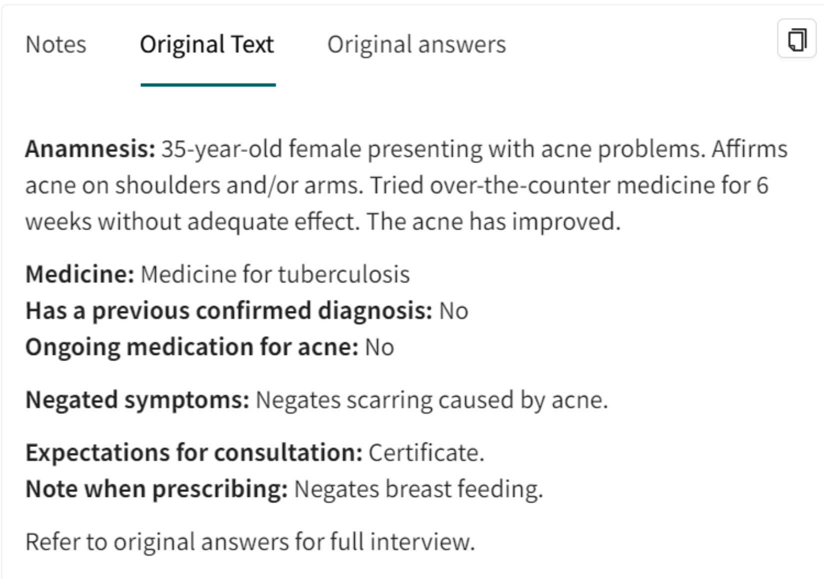
11.3.4. Exit care advice

If the healthcare personnel in Clinic receives a patient in who has performed a triage which exited on an exit with an exit care advice, and chose to meet with healthcare personnel online, the specific exit care advice will be presented in the appointment.



The exit care advice will give further information to the health care professional about a specific exit.

11.3.5. Medical record notes



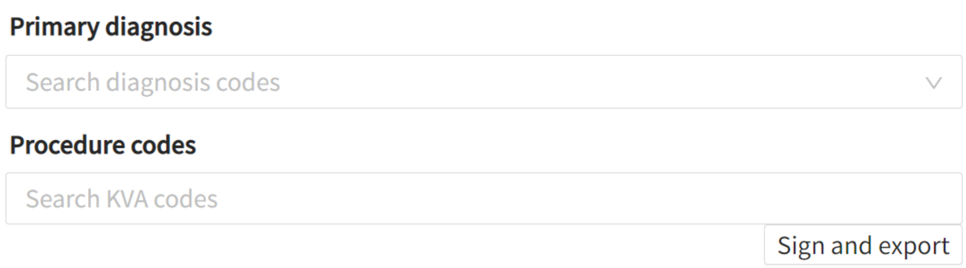
The medical record notes section contains **Notes** (the patient's medical history), **Original text** based on the questionnaires the patient has answered, and **Original answers** from the patient.

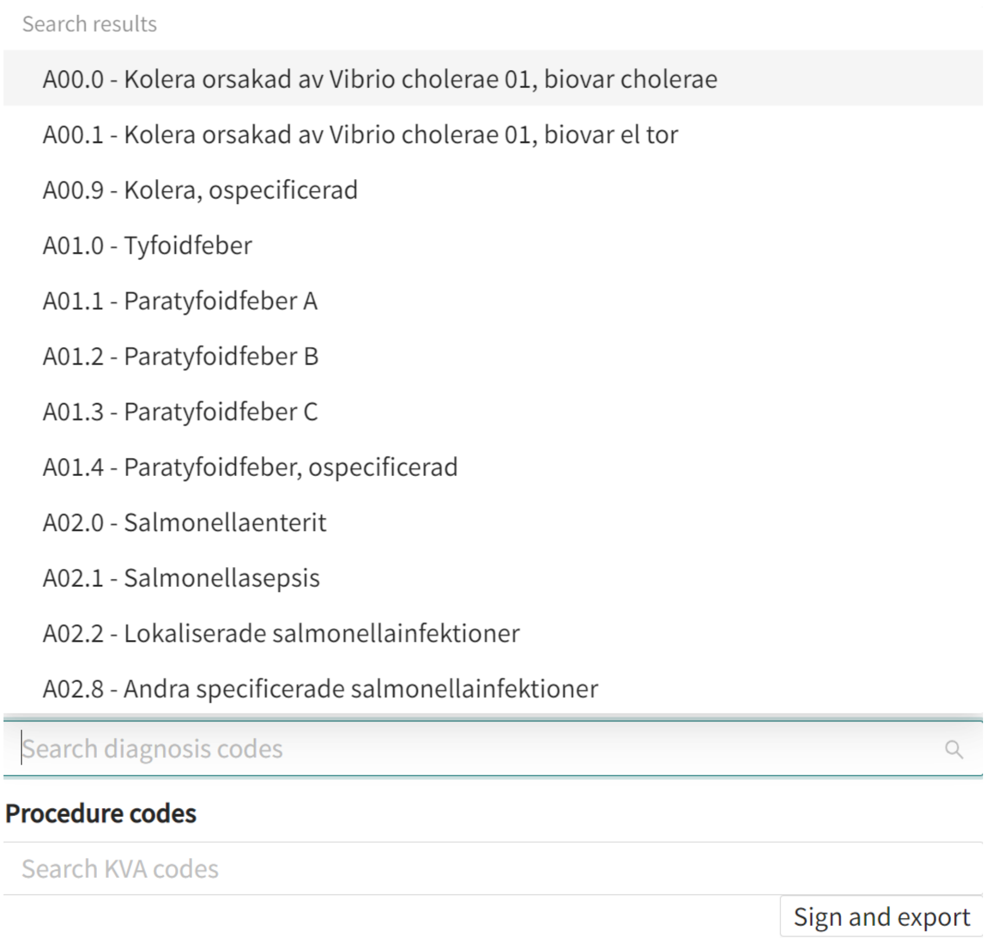
Notes

An automatically generated draft medical record text is created during appointments preceded by triage.

The patient's own medical history can be changed, and adjustments can be made while the appointment is in progress.

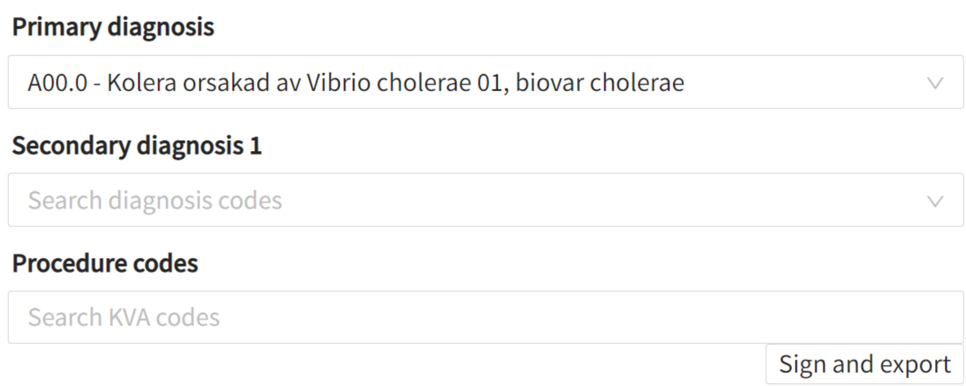
In **Primary Diagnosis**, suggested diagnoses are displayed based on the reason the patient has sought medical care for. It is also possible to search in the list.

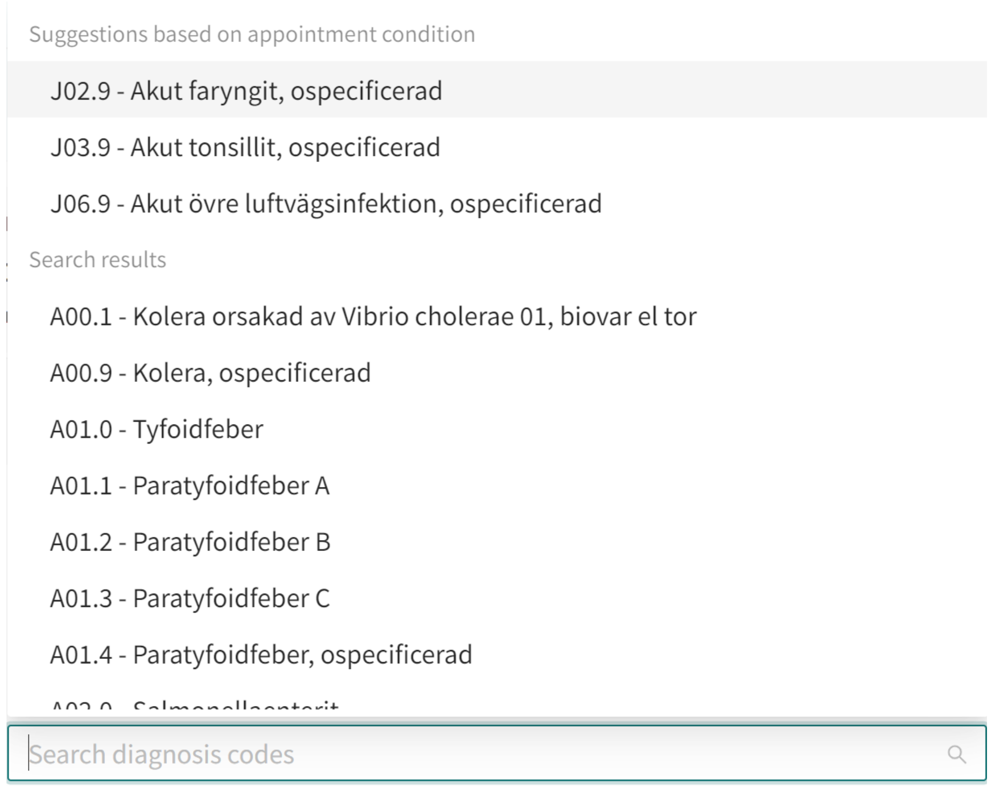




Once a diagnosis has been selected, it is automatically saved. You can delete a diagnosis by hovering over the selected diagnosis and clicking on the checkbox to the right.

When a **Primary diagnosis** has been selected, it is possible to add a **Secondary diagnosis**.



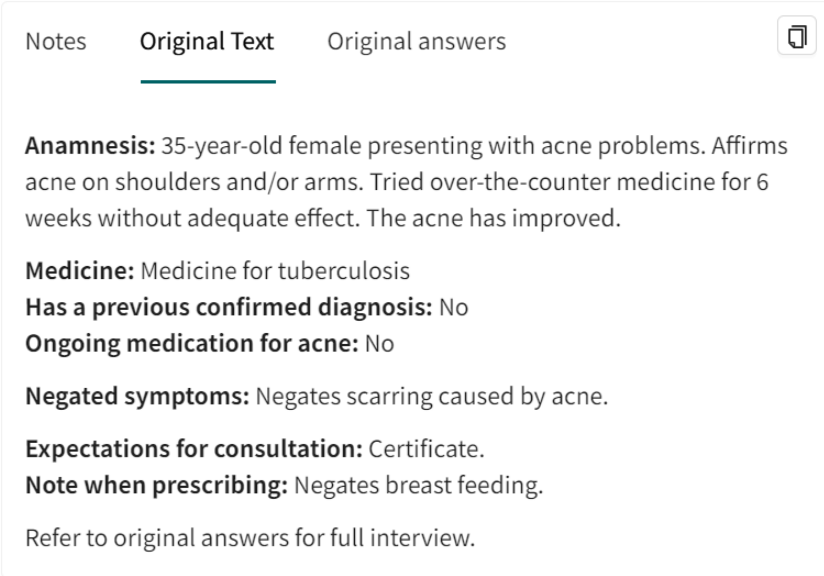


The note is automatically saved every few seconds.

When you feel the note is complete, click **Sign and copy** to lock the field and text. You can then paste it into your regular medical records system, where records are managed as usual. When the note is locked, you can click **Edit** to unlock it and continue editing. Each locked version of the note is saved in the database.

Original text

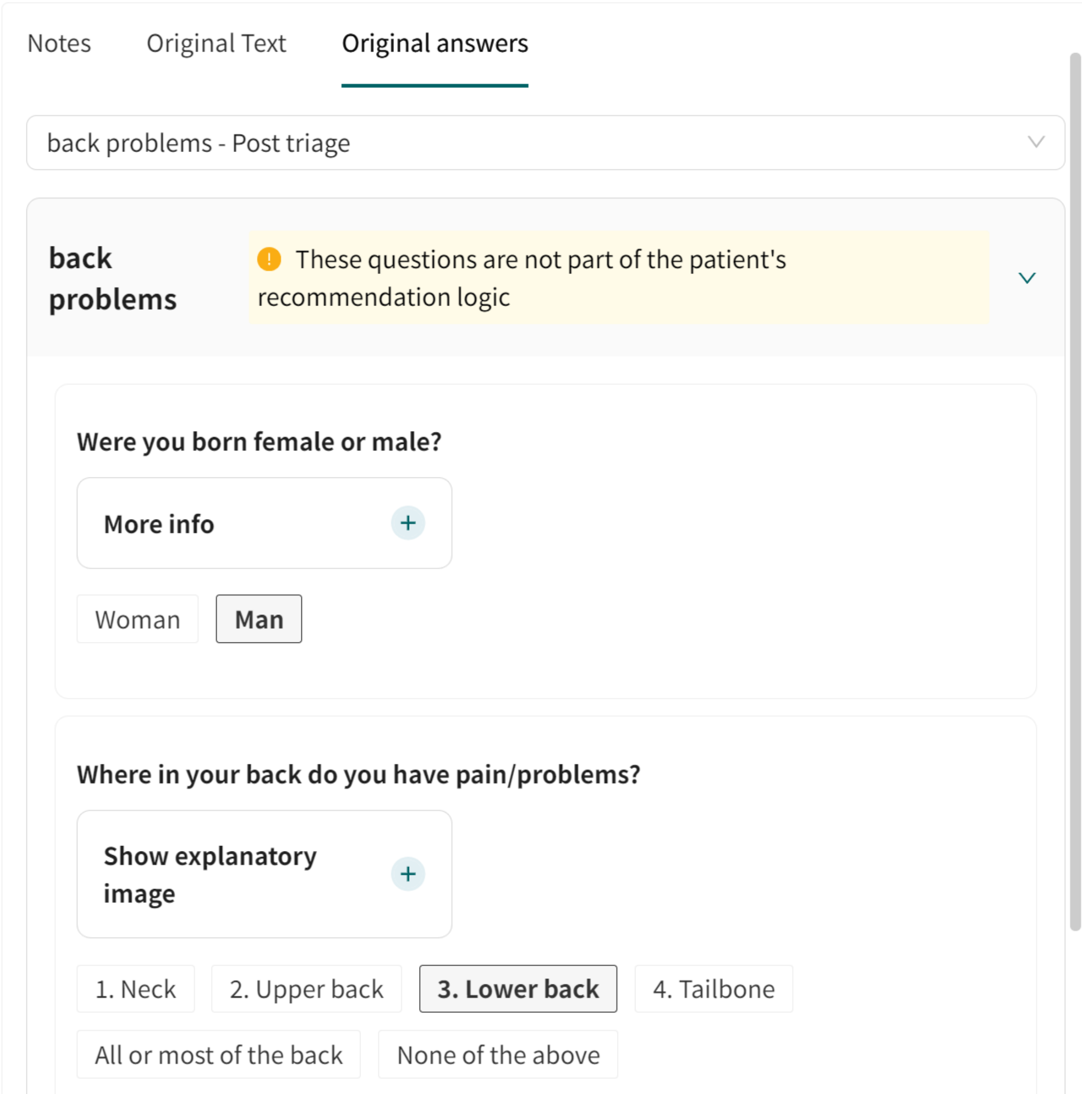
Under the **Original text** tab, you can see the automatically generated proposal for a medical record text, based on the questionnaires the patient has answered before and during the appointment.



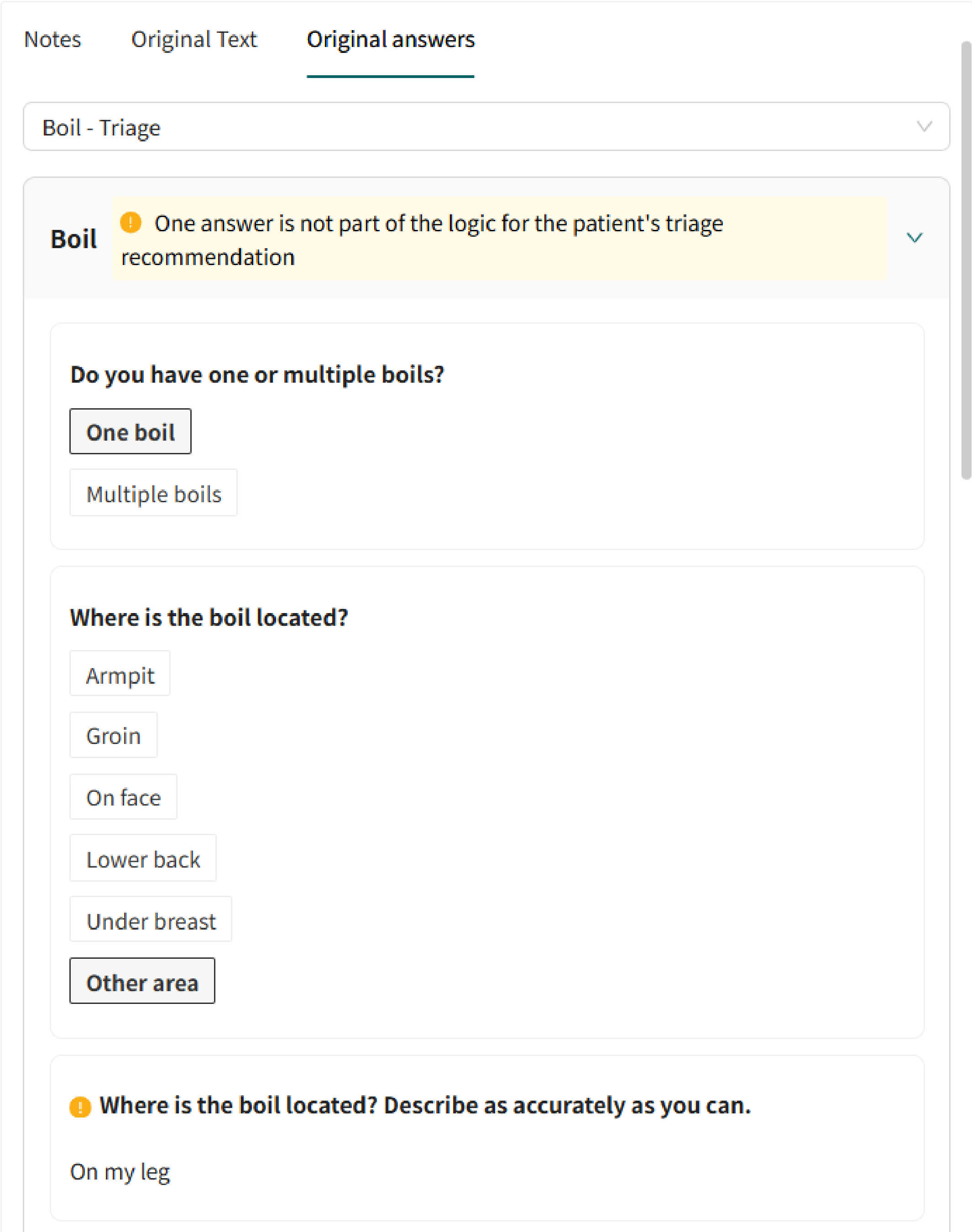
Original answers

Click on the **original answers** tab to see all the questions and answers from each questionnaire the patient has answered before and during the appointment. This summary also includes any additional information such as explanation text or pictures presented to the patient.

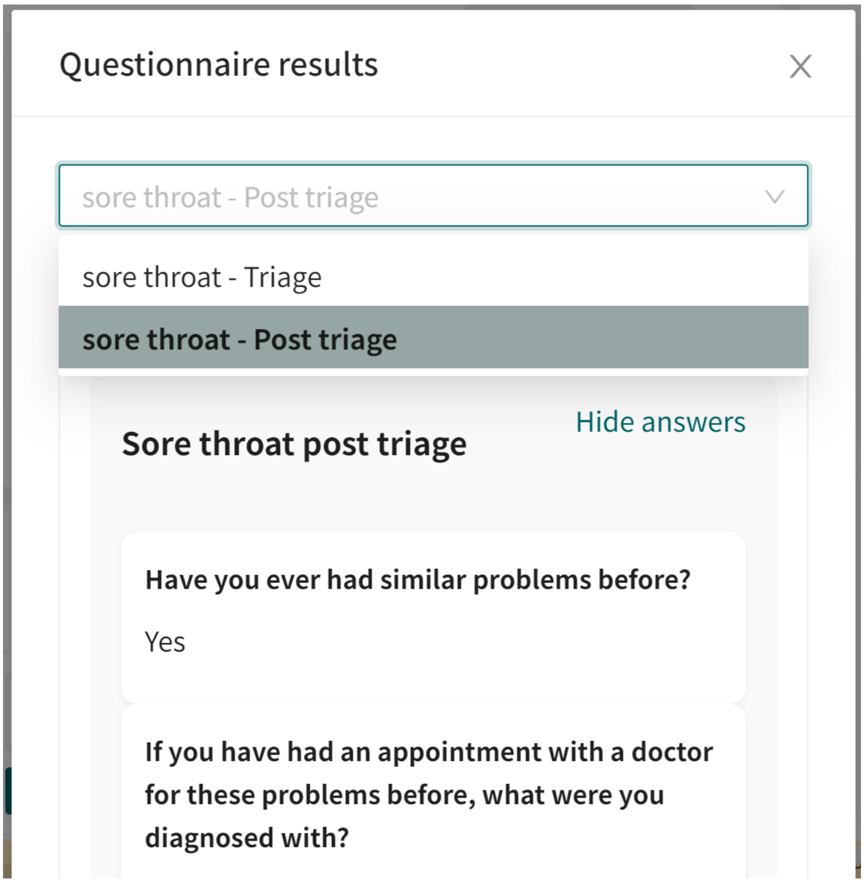
This original answers section will also present what part of the interview or questionnaire that has been a part of the patient's triage recommendation logic.



Note that if the patient answers a free text question or a file question, the answer will not be part of the triage recommendation logic. This is also indicated in the original answers section.

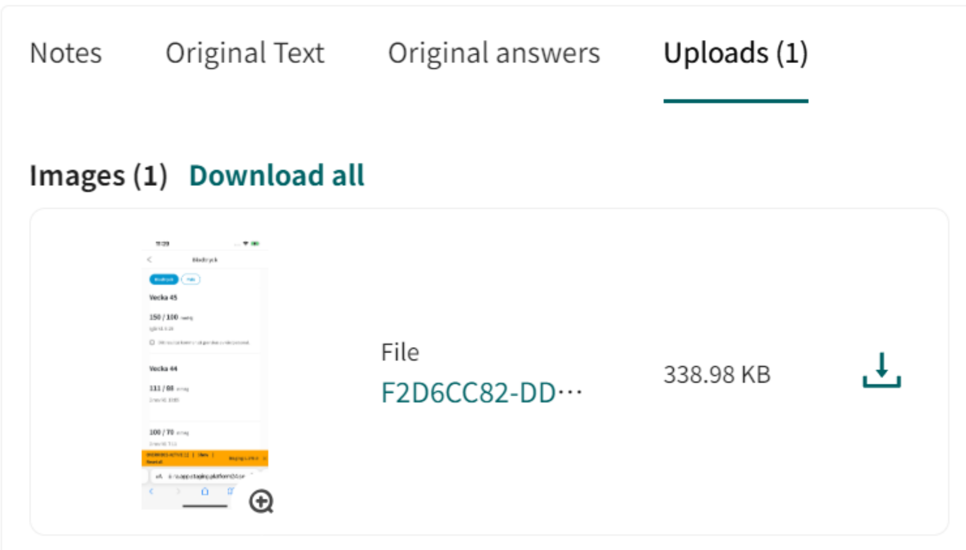


If the patient has filled in more than one questionnaire, select which one you want to read in the drop-down list.



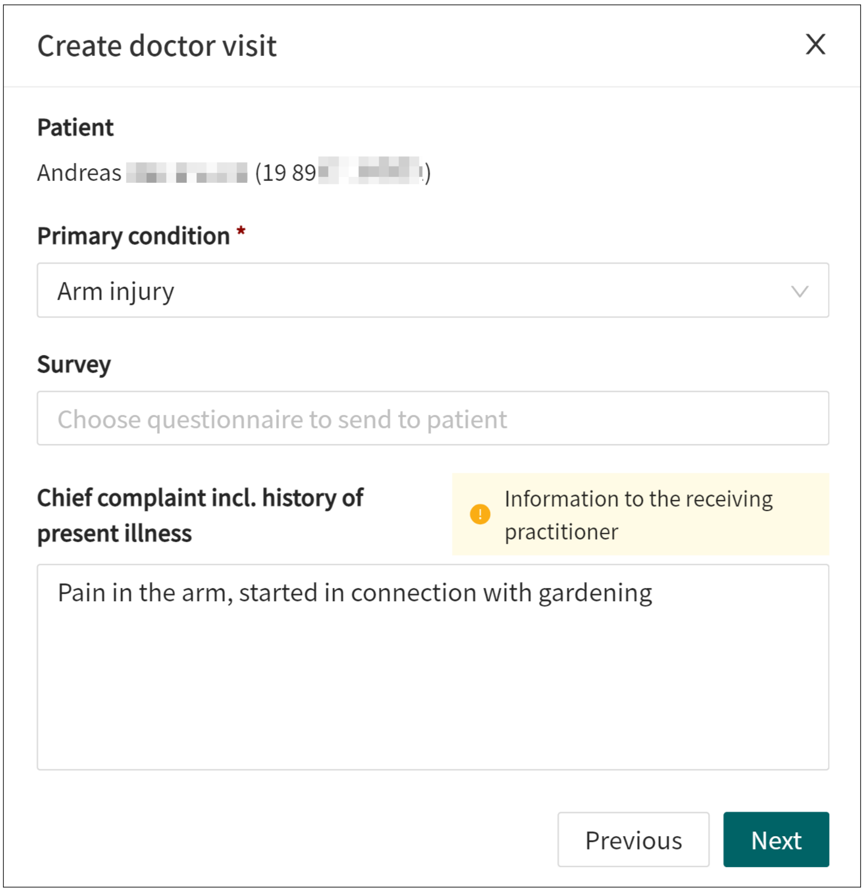
Uploads

Any PDF-files or images that the patient has uploaded via a questionnaire are listed in the **Uploads** tab. Note that this tab only will be visible when something has been uploaded.

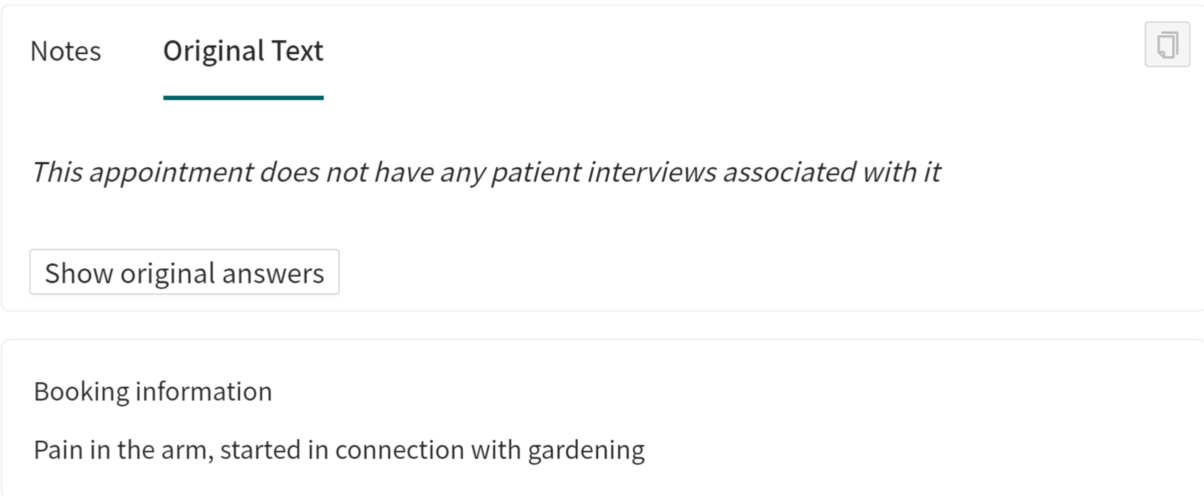


Appointments booked by healthcare practitioners

To distinguish information from the patient and that which comes from healthcare practitioners, it is presented later in its own box under the medical record note. This is done in cases where healthcare practitioners have booked a scheduled appointment and entered medical history information when the appointment was created, like in this example:



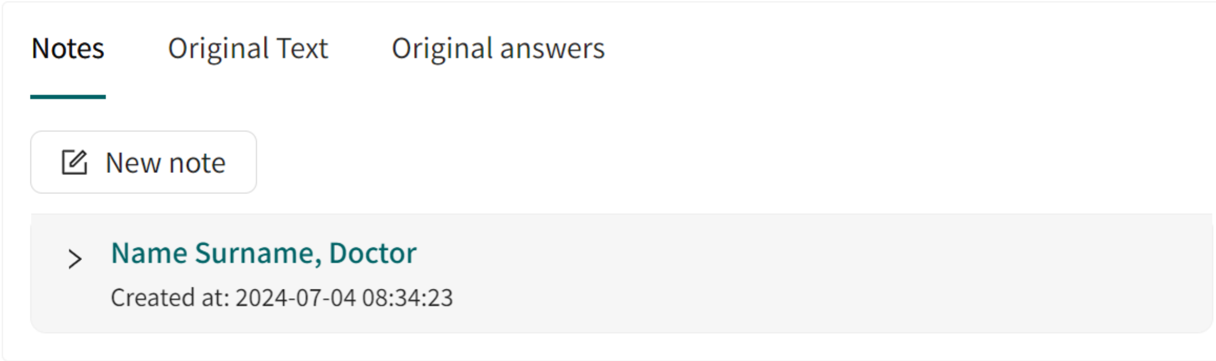
The heading for the box is **Booking information**. The box is not displayed when there is no information to show.



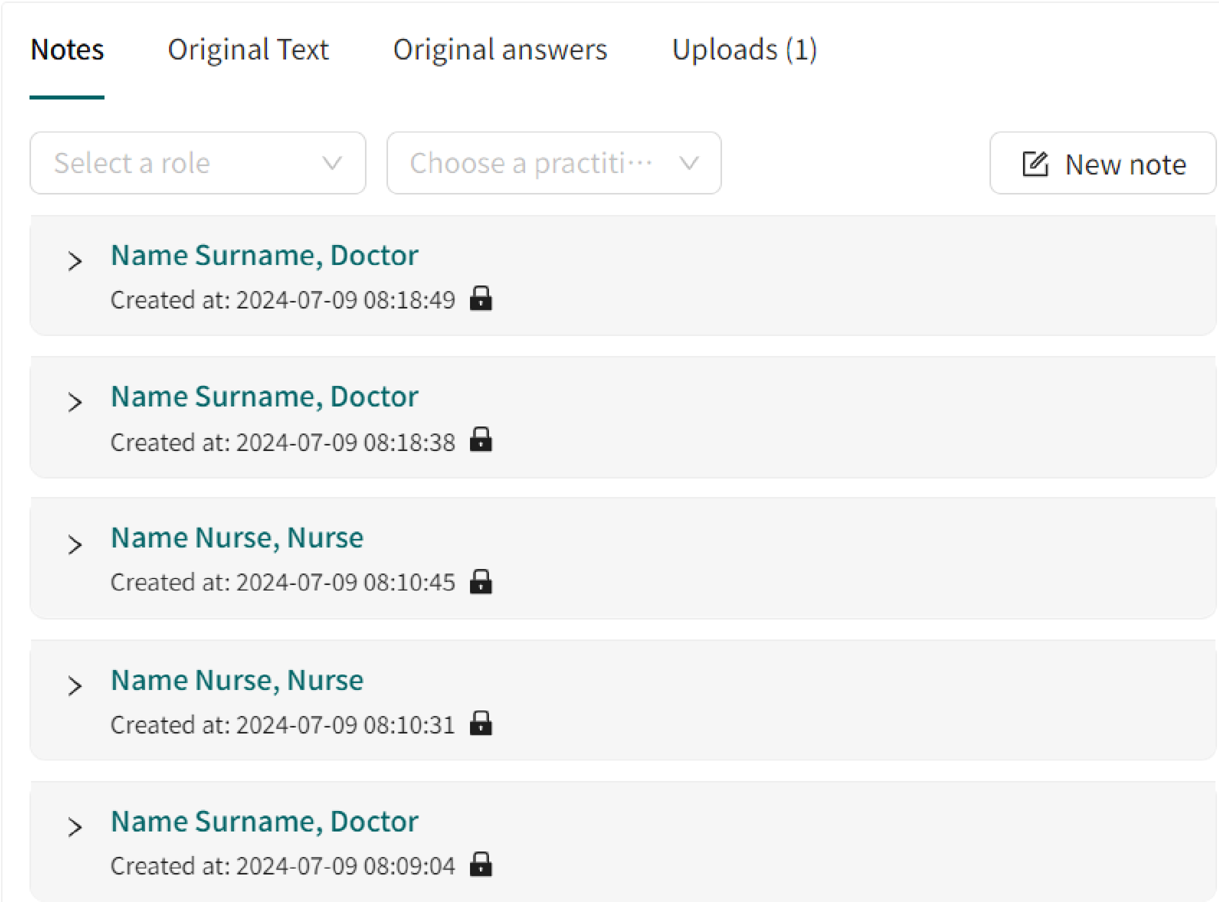
Multiple medical record notes

Several different notes from different healthcare providers can exist for each patient appointment.

Each note can be minimised. The first note is created when a staff member starts a patient appointment. The automatic medical history (if one exists) will appear under **Original text**.



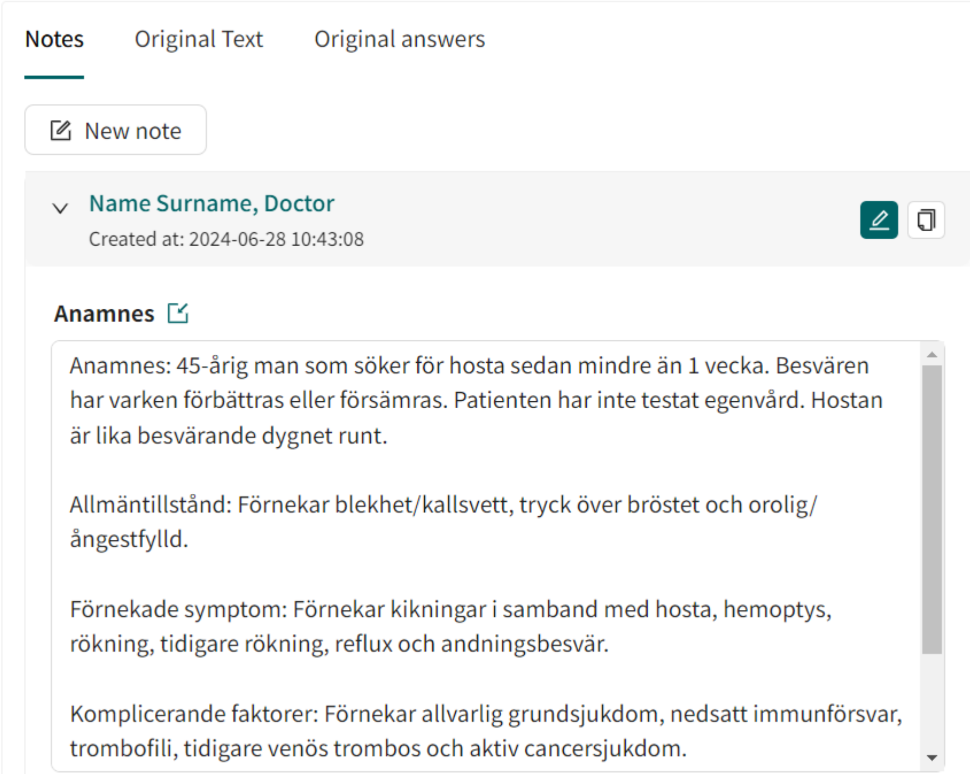
If there are more than 5 notes per appointment, a field with filters appears above the notes. Here you can filter **Role** and **Healthcare practitioner**.

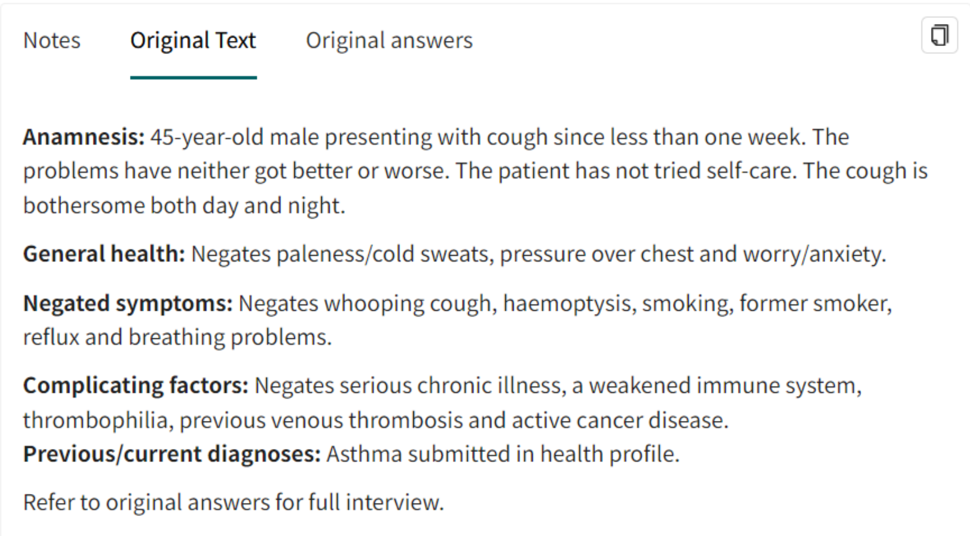


Keywords in medical record notes

For some partners, each note consists of several different *keywords*. By dividing the medical record note into keywords, it becomes more structured and easy to read.

The automatic medical history (if one exists) will appear under **Original Text** and in the **Patient's own medical history** field as editable text.



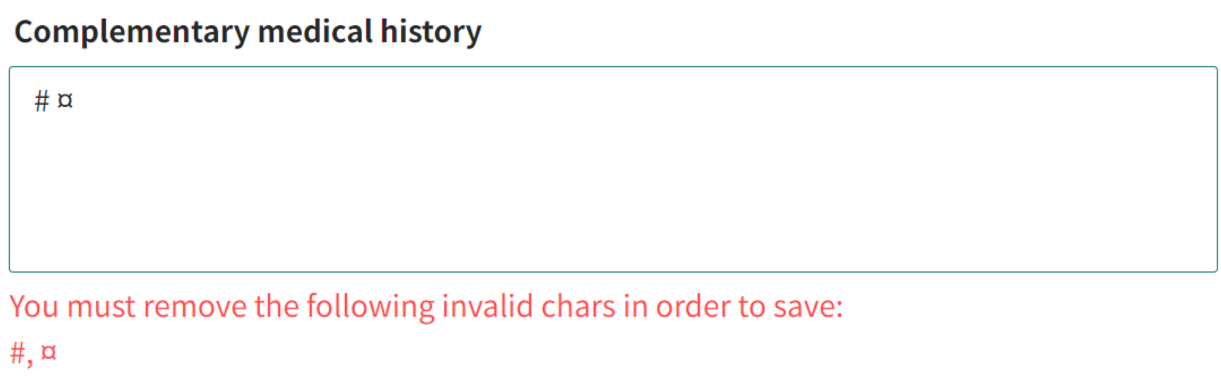


Allowed characters in notes

The following characters are allowed in notes:

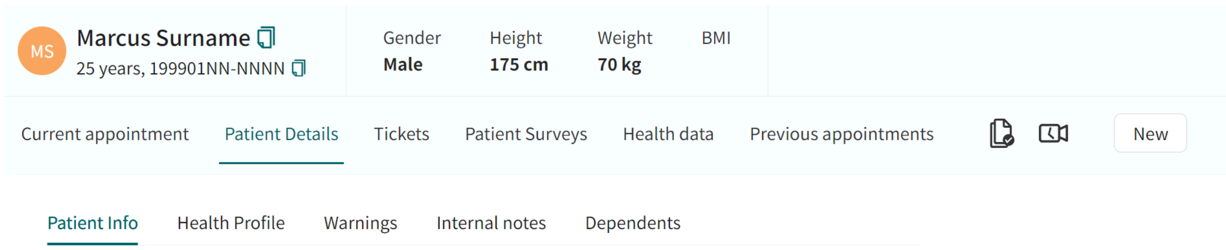
a-ö, A-Ö, æ, ø, 0-9, ()!?+-%*;:,."'=/@

If you use other characters, the note is not saved and a warning informs you of which characters to delete:



11.4. Patient details

Click on the **Patient Details** tab under a patient's name to access and edit patient-related information.



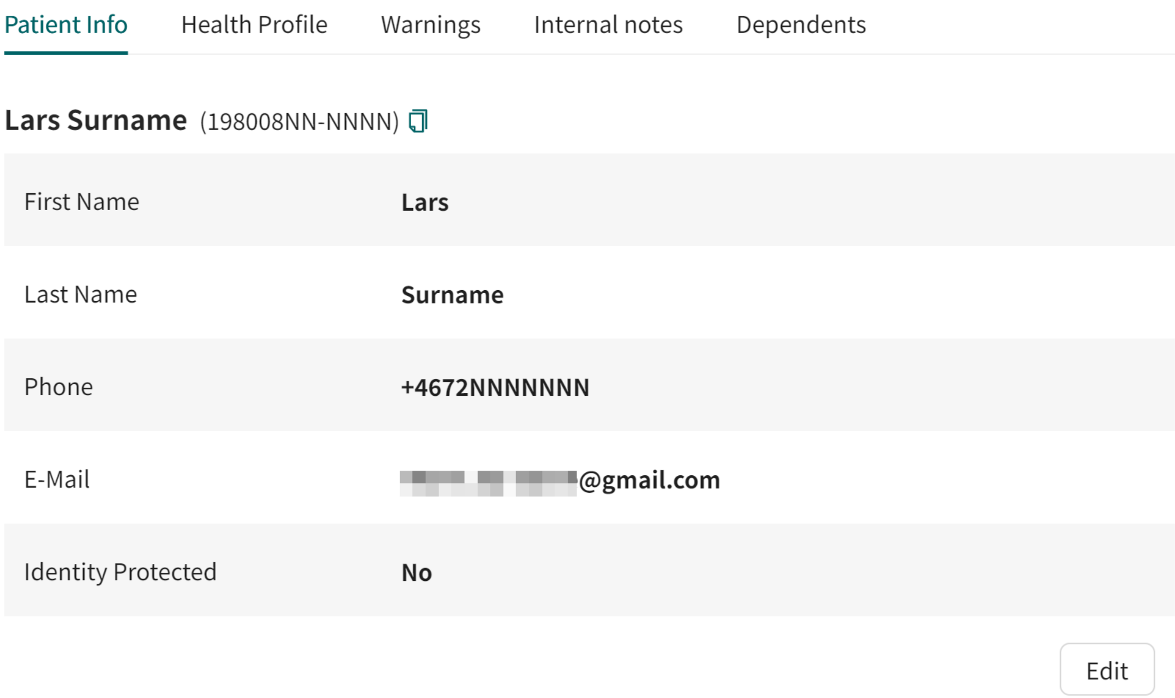
The **Patient Details** tab contains the following tabs:

- **Patient info**
- **Health Profile**
- **Warnings**
- **Internal notes**
- **Dependents**

See the upcoming sections for more information about these tabs.

11.4.1. Patient info

In the **Patient Info** tab the patient's name and contact details are displayed. You can edit contact details and indicate whether a person has a protected identity.



NOTE
You cannot withdraw a protected identity so contact Platform24 to change this information.

11.4.2. Protected identity

Patients can be marked with a protected identity either in Clinic, or by fetching information via integration to another system, which hides their names and contact details as shown below.

Patient Info | Health Profile | Warnings | Dependents

SKYDDAD IDENTITET (19[redacted])

First Name	**SKYDDAD**
Last Name	**IDENTITET**
Phone	**SKYDDAT**
E-Mail	**SKYDDAD**
Identity Protected	**Yes**

11.4.3. Health profile

In the **Health profile** tab the patient's health profile is displayed and it cannot be edited. Certain care units are configured to force patients to fill out a health profile the first time they log into the Patient app, while other units do not, which is why the profile in these cases may lack content.

Health Profile

Height	182
Weight	76
Allergies	ASA
Diagnosis	Asthma
Surgeries	NO
Medications	Bricanyl

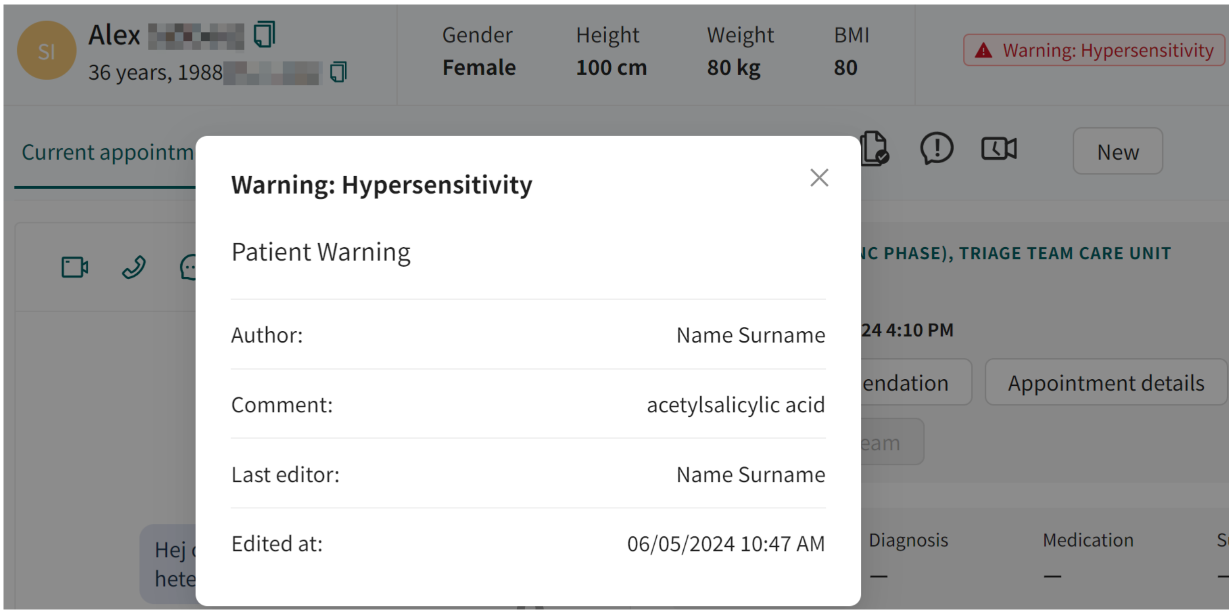
Patients can change their health profiles at any time in the Patient app.

> **NOTE**
> If patients have not altered their health profile after completing it for the first time, it may not be up to date. It is therefore always important to double-check this information with the patient when it is relevant.

11.4.4. Warnings

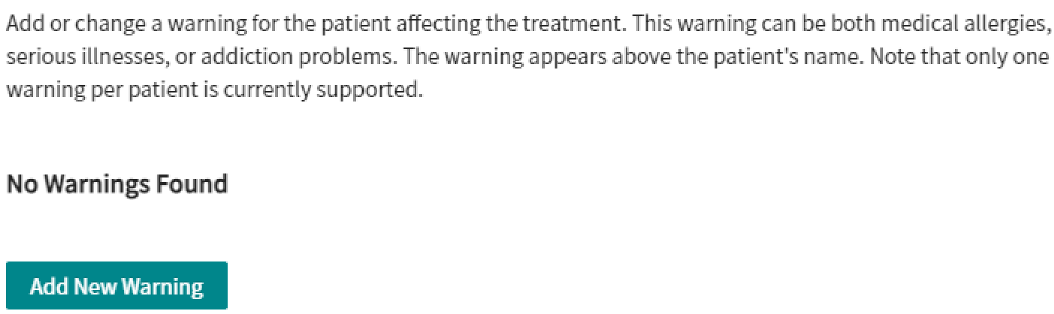
This **Warnings** tab enables you to add or change patient warnings that can affect the assessment of the patient. The warning is then displayed in the header next to the patient's name.

Click on the label for more information concerning the warning:

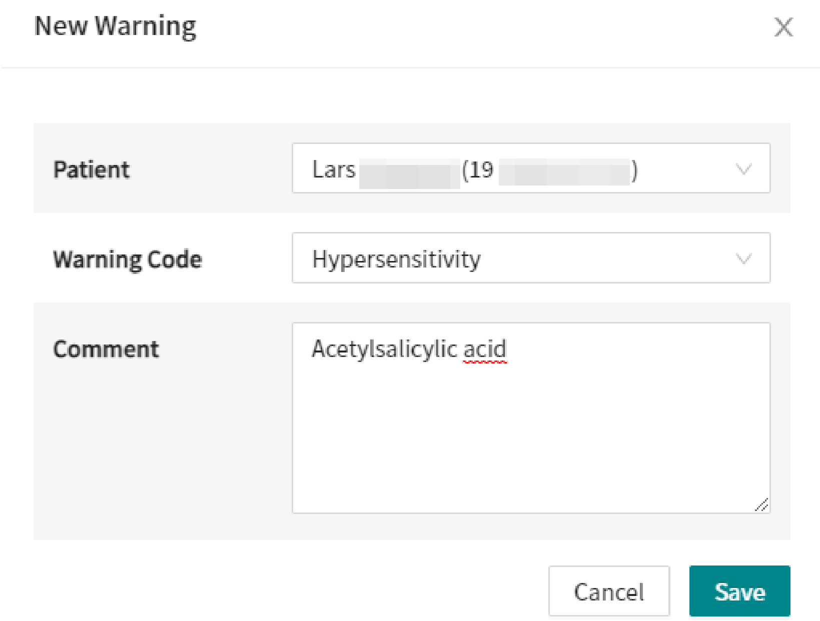


Adding a warning

1. Click on the **Warnings** tab in **Patient Info**.
2. Click **Add new warning**.



3. In the **New Warning** window, you can fill in:

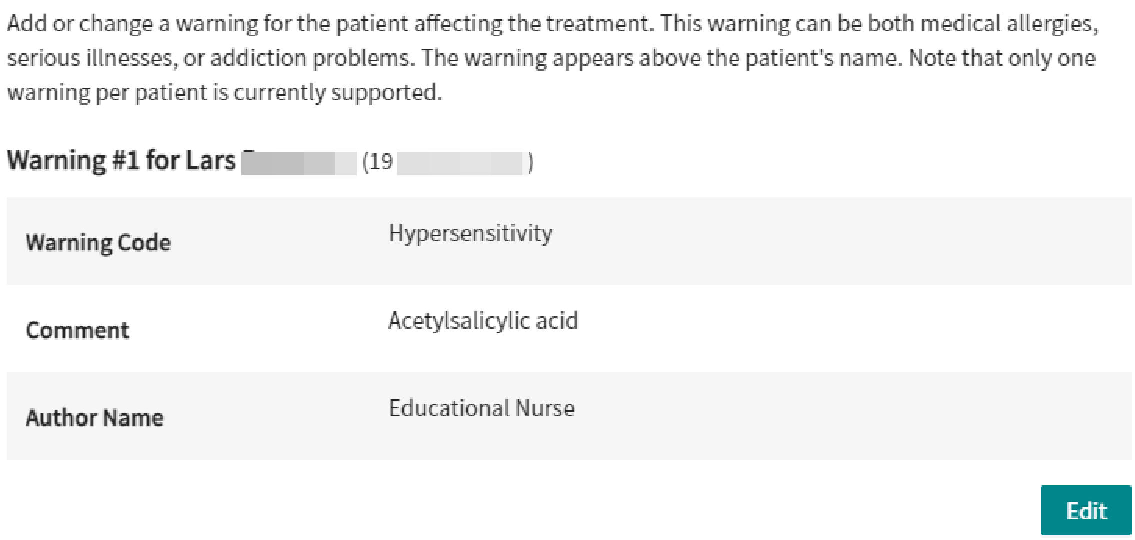


   a. **Patient**
   b. **Warning code**
   c. **Comment**

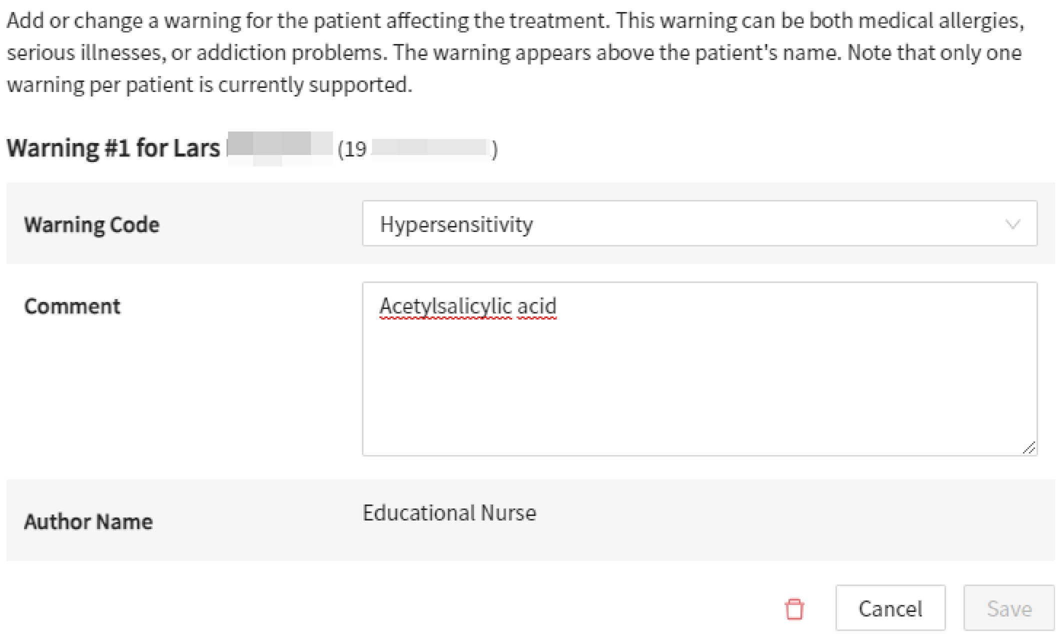
   All fields are required.

Editing or deleting a warning

1. Click on the **Warnings** tab in **Patient Info**.
2. Click **Edit**.



3. To change a warning:
   a. Add your changes to the **Warning Code** and **Comment** fields.

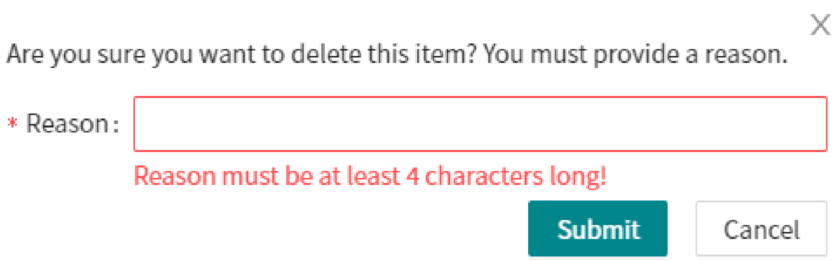


b. Click **Save**.

4. To delete the warning:

   a. Click on the red trash bin.

   b. Fill in the **Reason** why you want to delete the warning (required).

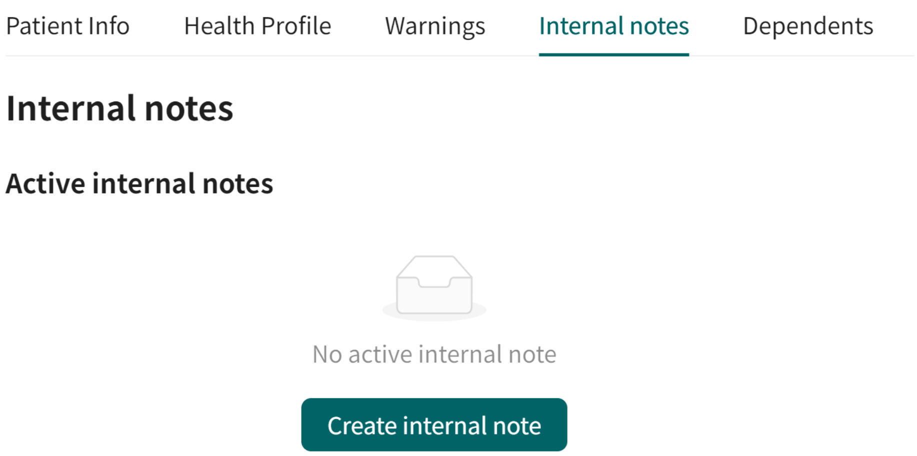


   c. Click **Submit**.

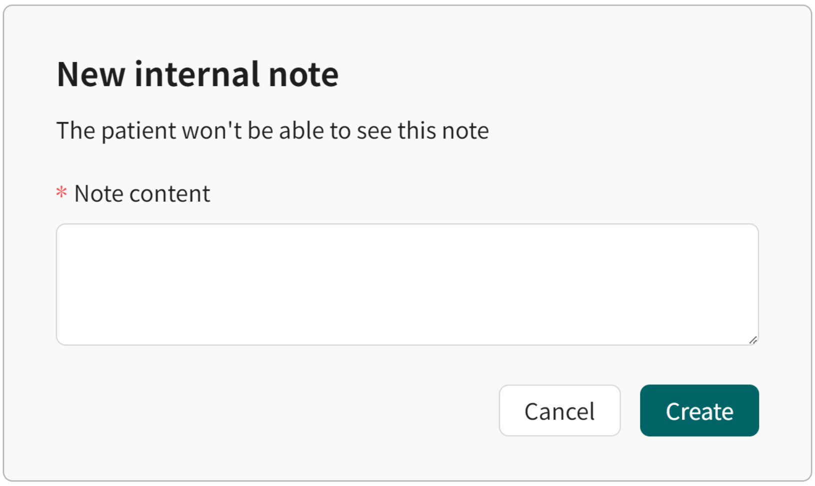
11.4.5. Internal notes

This tab enables you to add internal notes about a patient that only will be visible to practitioners. To add an internal note:

1. Click the **Create internal note** button.

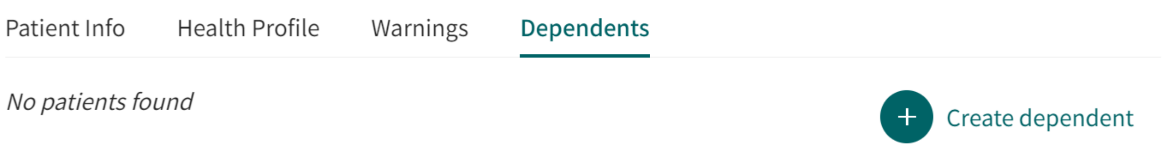


2. Add the text and confirm by clicking the **Create** button.

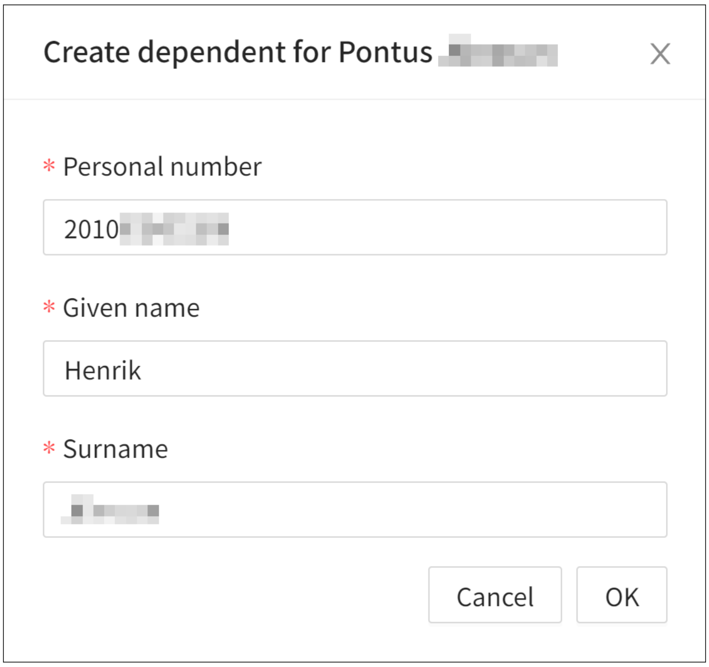


11.4.6. Adding children

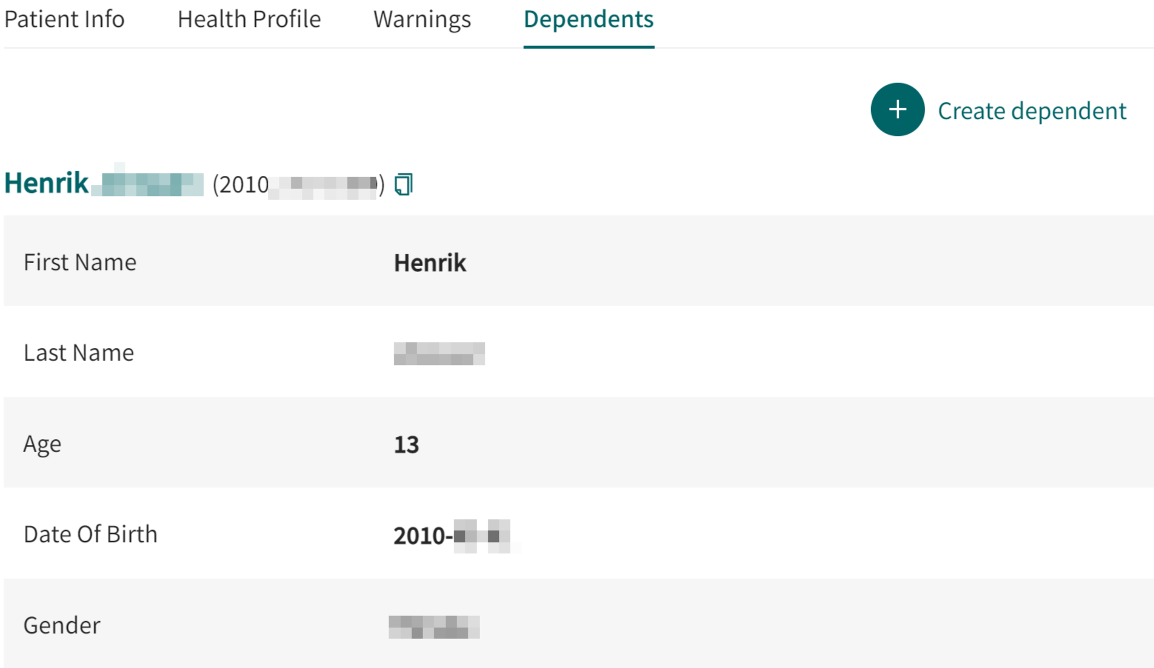
1. Click on the **Dependents** tab.



2. To add a child, click the **Create dependent** button.
3. Enter the relevant details and click **OK**.



4. Close the dialog. The child has now been added.



5. Click the child's name followed by the **Edit** button to change the information.

11.5. Tickets

> **NOTE**
> This section applies to care units that are configured to send booking tickets.

11.5.1. Viewing created tickets

Tickets sent to patients can be found in the **Tickets** tab in the menu under a patient's name. Here you can see an overview of each ticket, for example, when the ticket becomes valid, when it expires as well as the status of each ticket. It is also possible to cancel the tickets if they have not been used by the patient or have expired. Click the + sign to expand the ticket row to view more details about the ticket.

This view includes the following tabs:

- Booking tickets (also includes drop-in tickets)
- Questionnaire tickets (only for stand-alone questionnaires)
- Payment tickets

Booking ticket   Vragenlijst ticket   Betaal tickets

	Reden voor afspraak	Geldig vanaf	Geldig tot en met	Gebruikt	Status	Aangemaakt door	
+	BookingTicket step	2024-05-07	2024-05-14	2024-05-07	KLAAR	-	
+	BookingTicket step	2024-09-06	2024-09-06	-	GEANNULEERD	-	

In this list it is possible to view:

- The tickets that have been sent to a care unit within the current care provider
- The tickets that the logged in practitioner has sent to another care provider

11.5.2. Creating new tickets

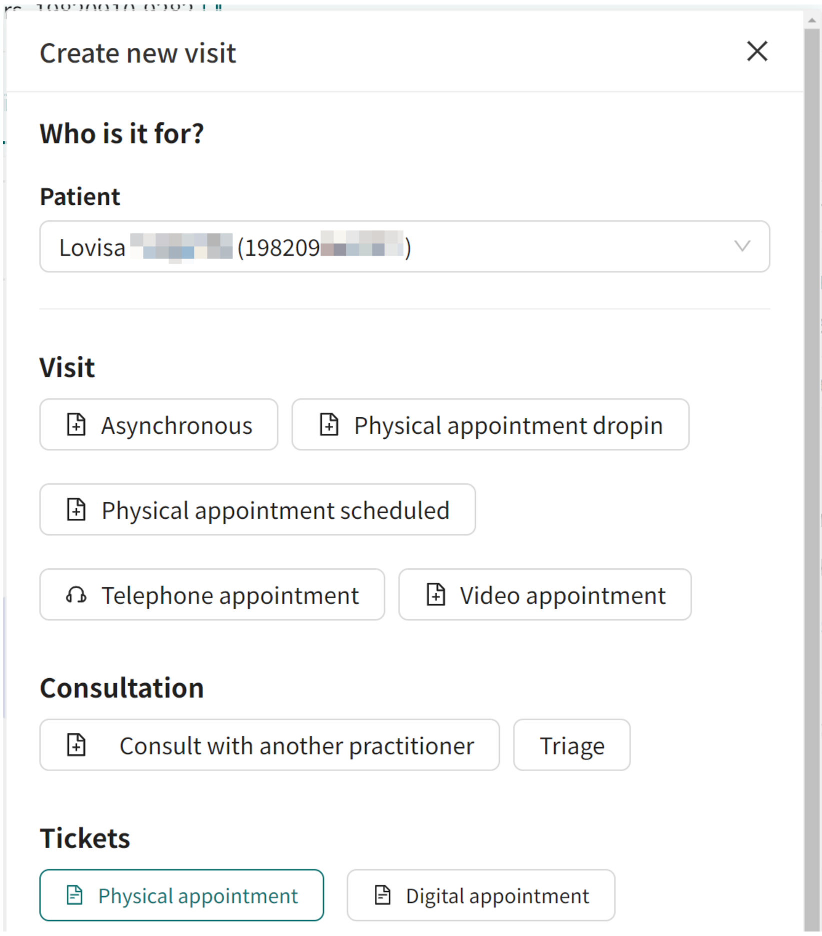
A ticket can be created for a patient at any time.

To create a ticket:

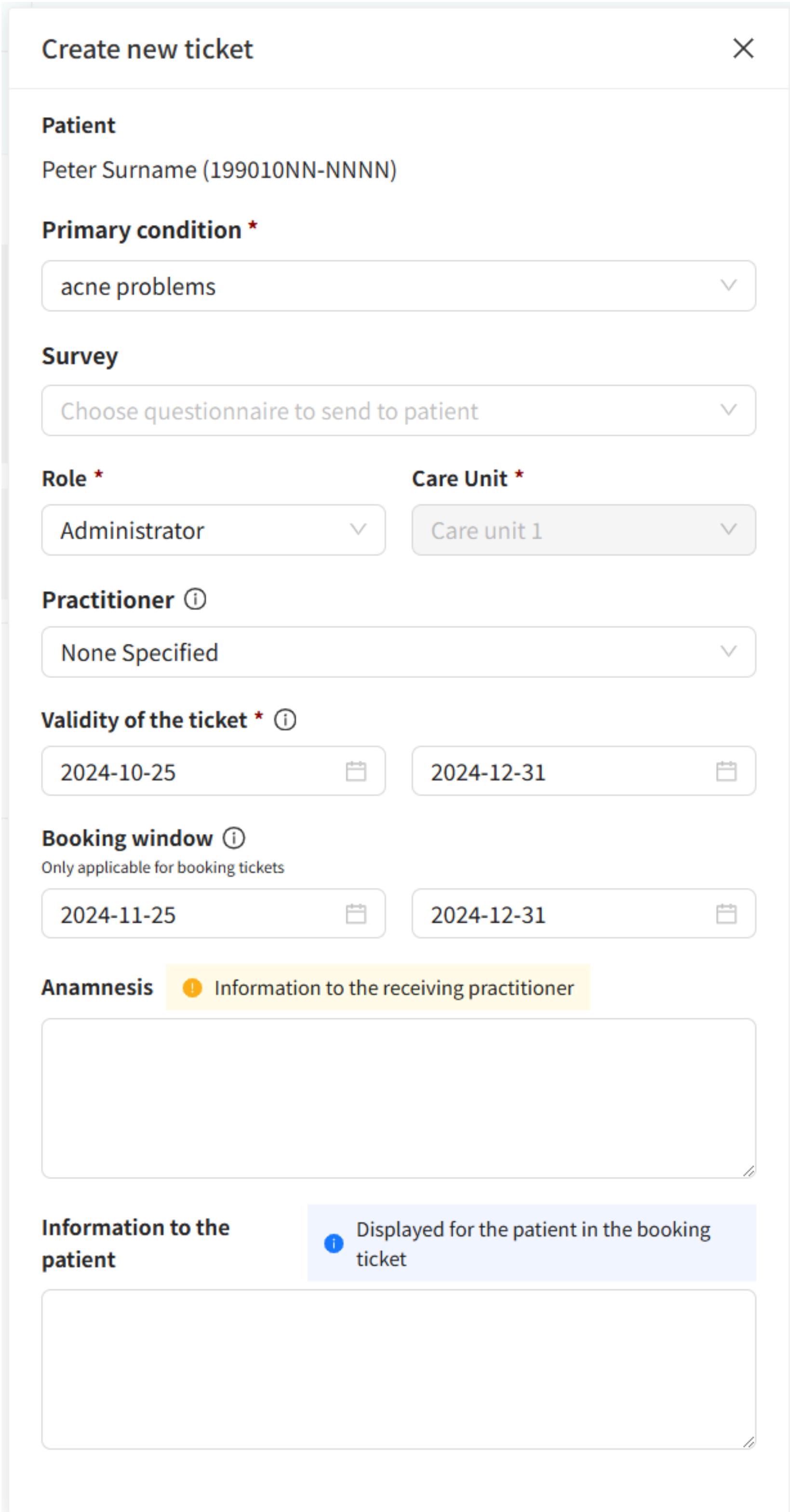
1. Click the **New** button in the appointments page to open the **Create new visit** dialog.

   New

2. In the **Tickets** section, select the desired type of ticket (e.g., physical appointment, digital appointment, stand-alone questionnaire). The ticket names are determined and set for each customer.

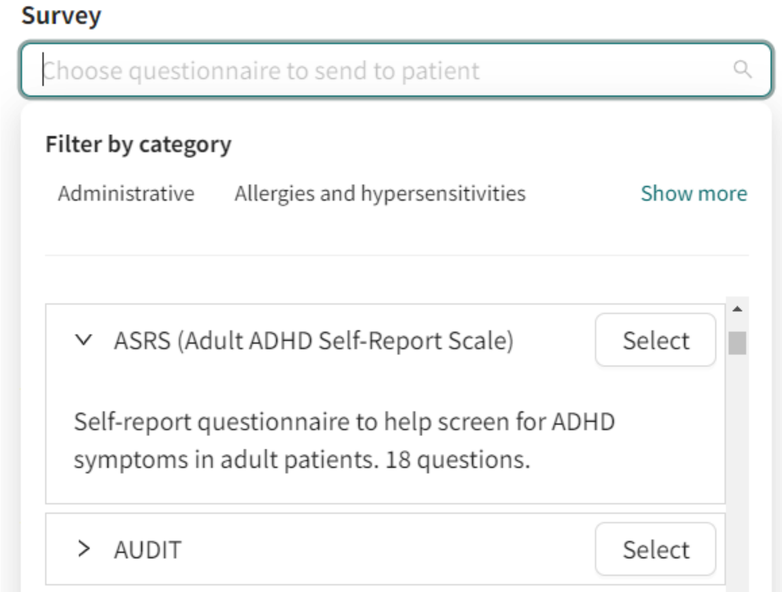


This opens the **Create new ticket** dialog.



3. In the **Create new ticket** dialog:
   a. Select the **Primary condition**.
   b. If a questionnaire should be sent to the patient, select the questionnaire in the **Survey** drop-down list. A short description of the questionnaire is also available to help the practitioner, if this previously has been added in the **Description of questionnaire** field in

Content Studio. If a description is available, this will be shown in **Survey** drop-down list. Click the arrow next to the questionnaire name to see the description.



c. Select the **Role** of the practitioner and the **Care unit** you want to send the booking ticket to from the drop-down lists.

d. Select **Practitioner**.

e. In the **Validity of the ticket** field, select how long the ticket should be valid for. The validity period determines when the patient can use the ticket in the Patient app.

f. For booking tickets, select the **Booking window** for the ticket (not applicable for questionnaire and drop-in tickets). The booking window decides between which dates the patient can book an appointment. If no dates are set for the booking window, the validity period is used.

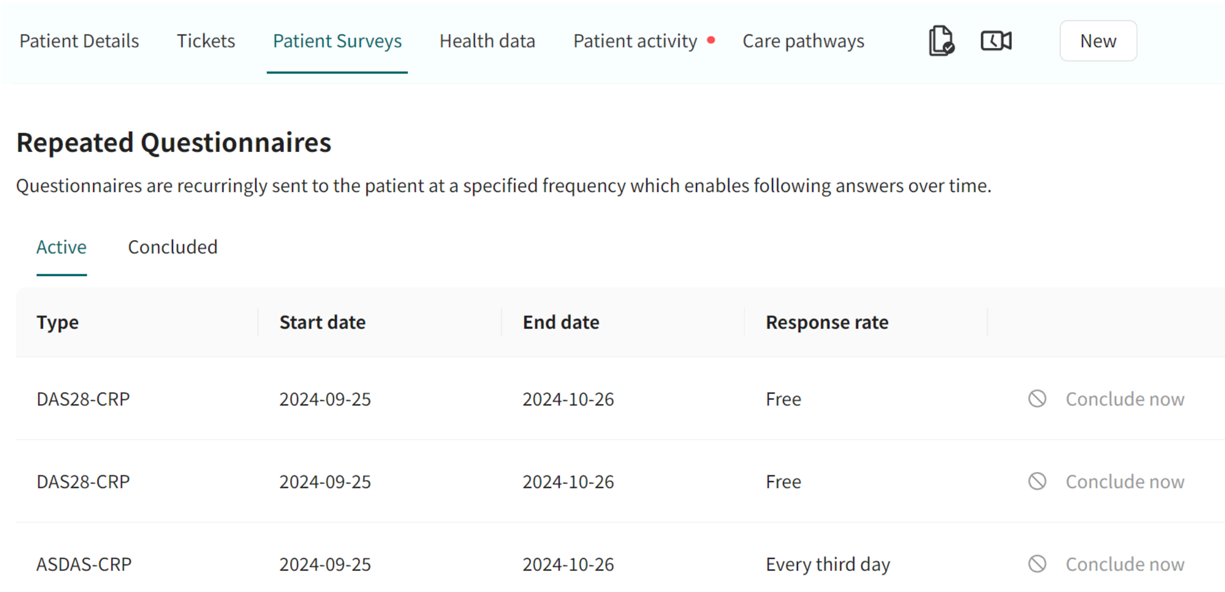
g. Add information for the receiving practitioner in the **Anamnesis** field.

h. Add information that will be displayed for the patient in the booking ticket in the **Information to the patient** field.

4. To view detailed technical information (for trouble shooting), click on the gear icon next to the **Send** button in the lower right corner.
5. Click **Send**.

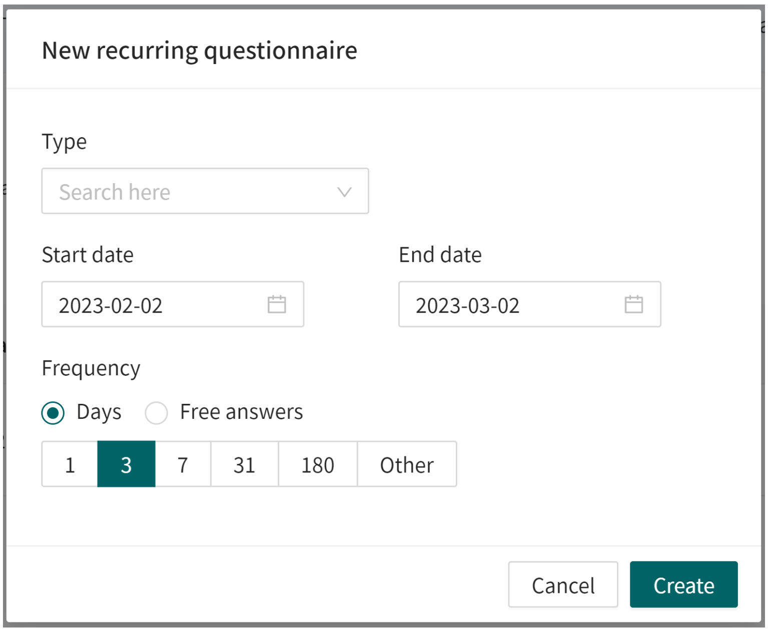
11.6. Recurring questionnaires

Questionnaires that are sent to the patient at regular intervals are shown in the **Repeated Questionnaires** section in the **Patient Surveys** tab.



To create a recurring questionnaire:

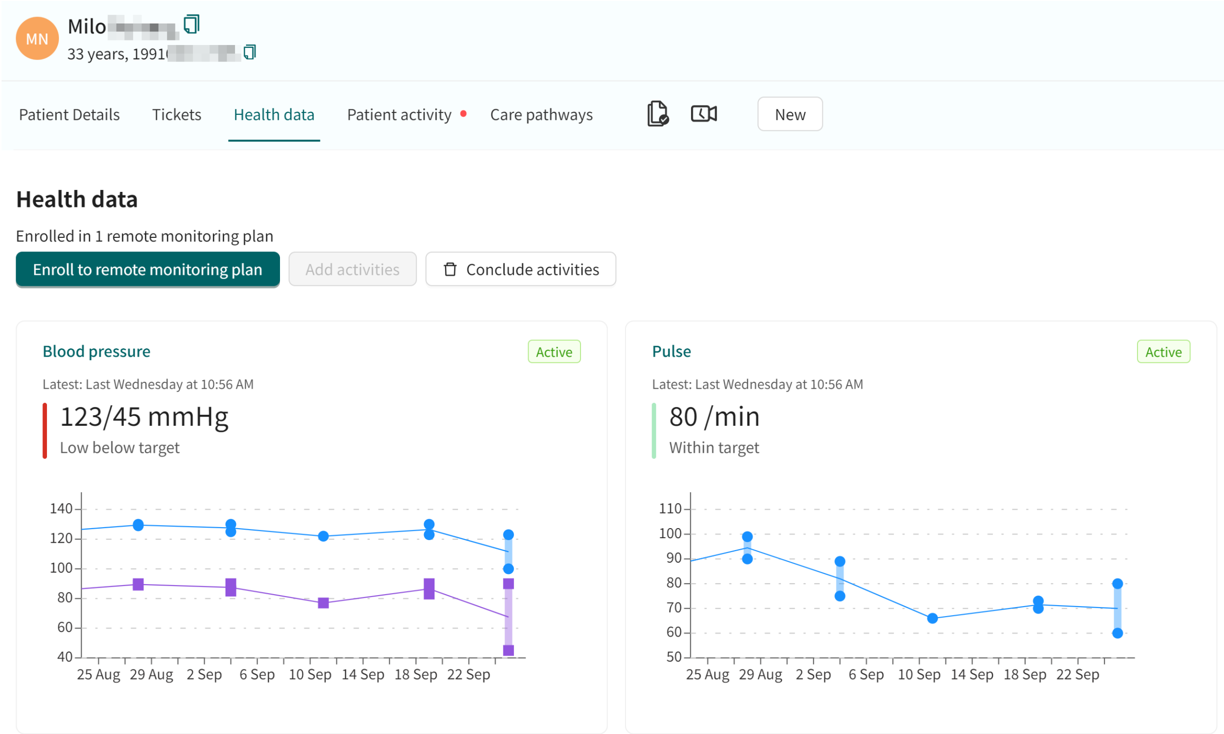
1. Click the **New recurring questionnaire** button to open the corresponding dialog.



2. Select the **Type** of questionnaire, **Start date**, **End date**, as well as how often the questionnaire should be sent (**Frequency**).
3. Click **Create**.

11.7. Health data

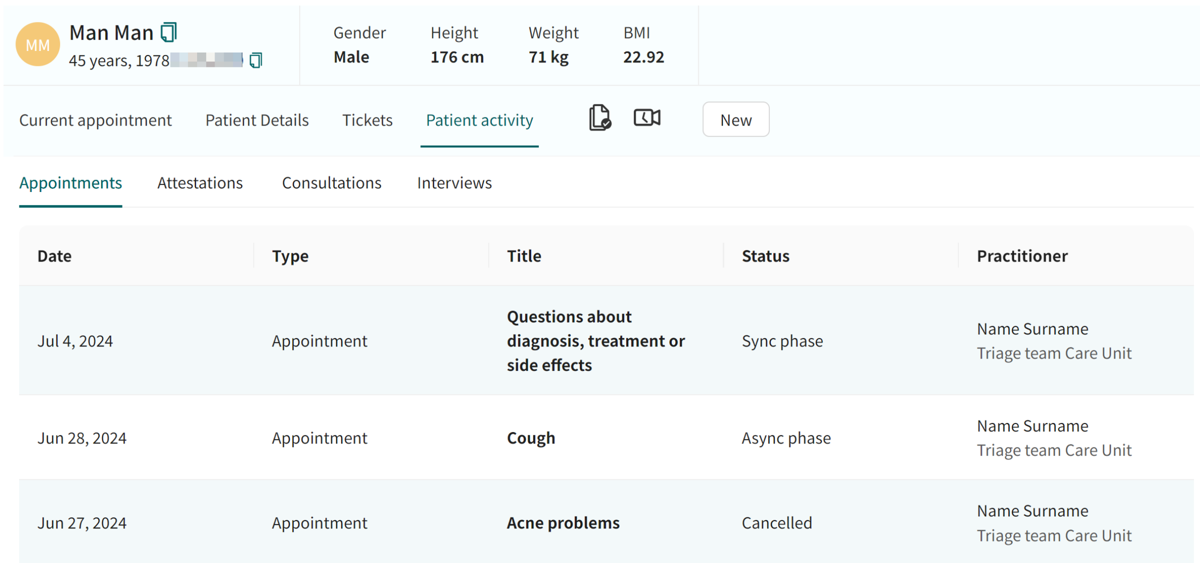
To be able to see the health data graphs (collected via questionnaires), go to **Patient profile** > **Health data**. Here you view how the health data evolves over time.



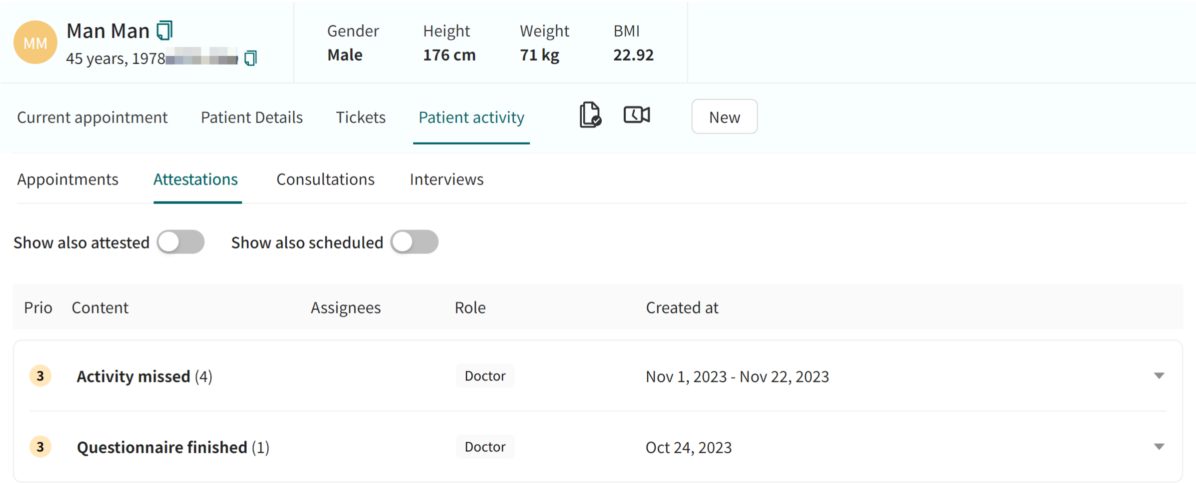
11.8. Patient activity

In the **Patient activity** tab, the activities regarding a specific patient are listed:

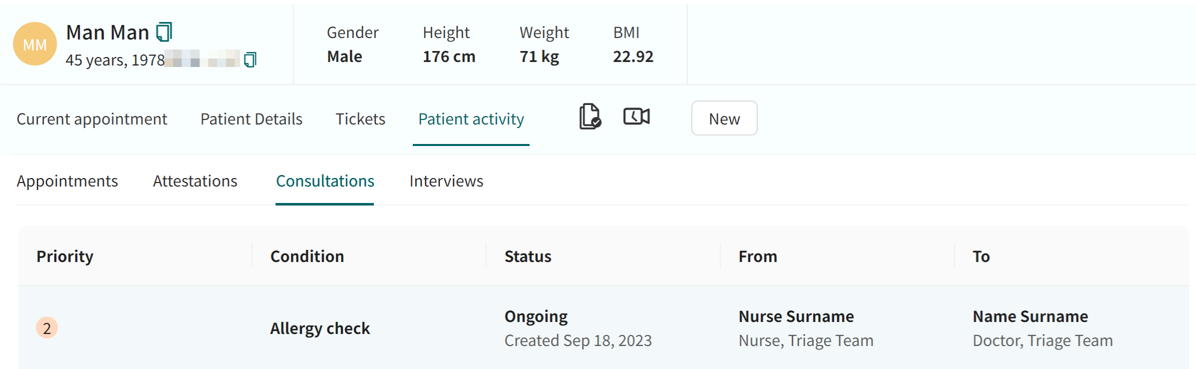
- **Appointments**: All booked and finished appointments (including interviews and consultations)



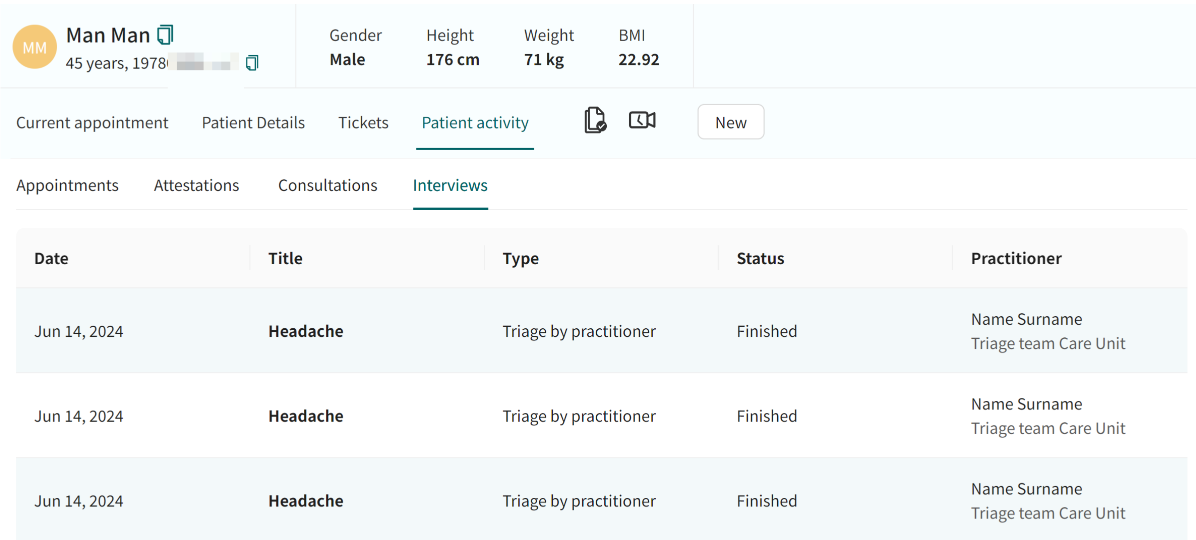
- **Attestations**: All attestations



- **Consultations**: All consultations (when consulting a colleague)



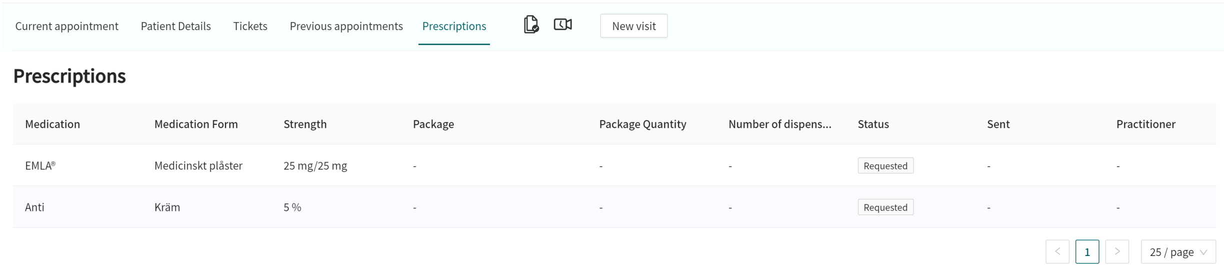
- **Interviews**: All interviews



NOTE
If a patient has sought care for their child, these appointments will also appear in this list, marked with the label "Child".

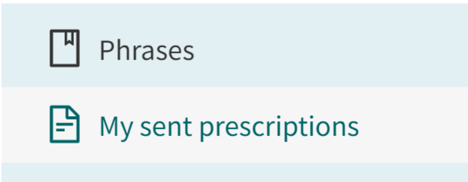
11.9. Prescriptions

Under **Prescriptions** in the menu under the patient's name, you will find the prescriptions sent for the patient via the platform (i.e. prescriptions sent from other systems are not visible here).



Medication	Medication Form	Strength	Package	Package Quantity	Number of dispens...	Status	Sent	Practitioner
EMLA®	Medicinskt plåster	25 mg/25 mg	-	-	-	Requested	-	-
Anti	Kräm	5 %	-	-	-	Requested	-	-

1. Click on **My sent prescriptions** in your profile to see all the prescriptions you have sent within the care unit where you are logged in.



11.10. Consent

If you click on the **Document** icon, you will see the consent requests patients have accepted or refused, if your care unit has the Consent function.

11.11. Completed video tests

If the patient has tested the camera and audio on their device prior to the appointment, these can be accessed by clicking on the **Video** icon in the Page Header. The table shows what time the test was conducted, which platform was used, which browser and results of the camera, audio and microphone.

TIP
This information is very useful for troubleshooting any problems during the video call.

11.12. New visits, consultations and tickets

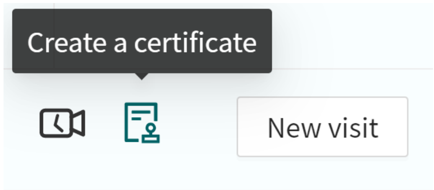
New visits, consultations and tickets for the patient are created by clicking the **New** button.

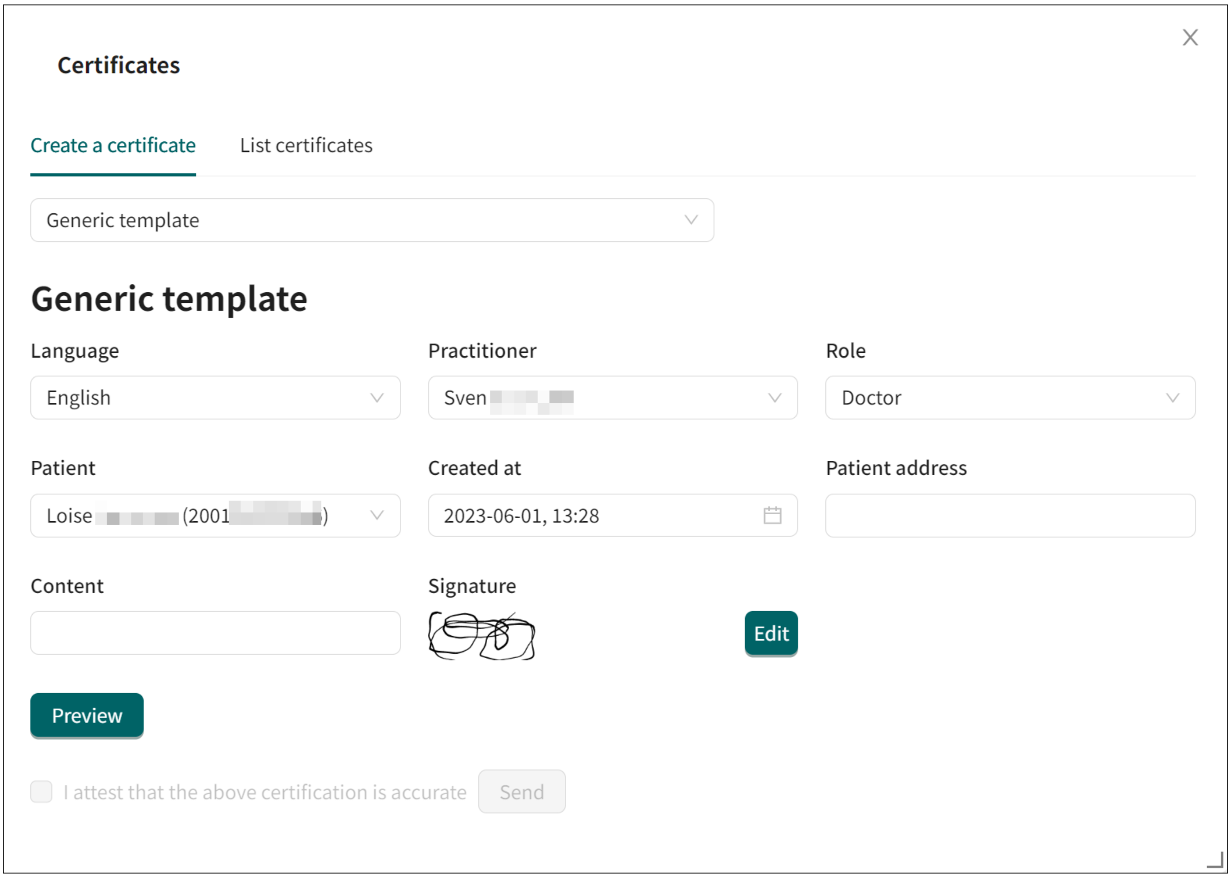
If this is done during an ongoing appointment, a future scheduled appointment is created. It is still possible to chat with an existing patient while the new appointment is being booked.

For more information on booking new appointments and the different appointment types, see Booking an appointment for a patient [99].

11.13. Certificates

It is possible to create different health certificates using the **Create a certificate** icon. This applies only to care units that have enabled the feature.



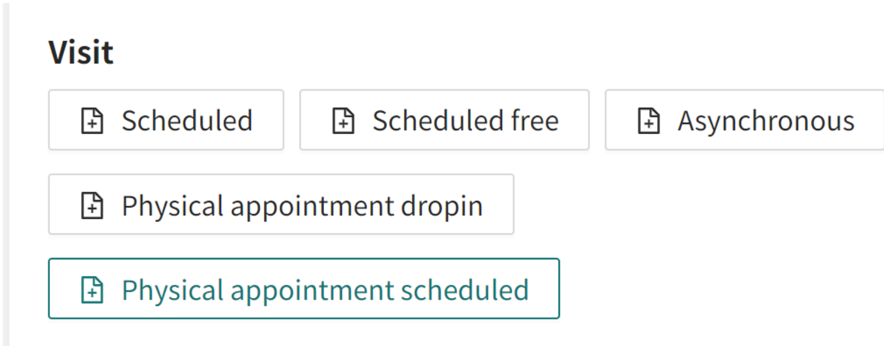


12. Booking an appointment for a patient

12.1. Book an appointment

1. Click on **Search patient**.
2. Search for the patient's name or unique personal identifier and press **Enter**.
3. Click on the patient that is displayed. If the patient is not already registered in the platform, click on **Create patient** and fill in the details.
4. On the patient page, click on **New**.

5. Select the visit type for which you want to book the patient.



12.2. Visit types

The visit types are listed in the table below and divided into scheduled appointments and drop-in appointments.

- **Scheduled appointments**: The purpose of a scheduled appointment is to have a meeting with a patient at a specific date and time. The different types of scheduled appointments are listed in the table below.
- **Drop-in appointments**: The purpose of a drop-in appointment is to make a first medical assessment of the patient in order to determine the next step. The different types of drop-in appointments are listed in the table below.

Table 2. Scheduled appointments

Visit type	Features	Description
Scheduled	• Chat ✅ • Video ✅ • Invite practitioners and external guests in advance ❌ • Priority sorting ✅ • Uses time slots ✅	A digital appointment created either through patient-initiated flows or by a practitioner in Clinic. Uses a previously created time slot in the **Time slots** workspace.

Visit type	Features	Description
Scheduled free	• Chat ✅ • Video ✅ • Invite practitioners and external guests in advance ❌ • Priority sorting ✅ • Uses time slots ❌	Exactly the same as a scheduled appointment, except that previously created time slots in Clinic are not used. However, you decide a date and time for when the appointment should be scheduled.
Physical scheduled	• Chat ❌ • Video ❌ • Invite practitioners and external guests in advance ❌ • Priority sorting ✅ • Uses time slots ✅	A physical appointment created either through patient-initiated flows or by a practitioner in Clinic. Uses a previously created time slot in the **Time slots** workspace.
Video	• Chat ❌ • Video ✅ • Invite practitioners and external guests in advance ✅ • Priority sorting ❌ • Uses time slots ❌	A digital appointment always created by a practitioner in Clinic. Includes the possibility to invite practitioners and external guests in advance. Does not include chat.

Table 3. Drop-in appointments

Visit type	Features	Description
Physical drop-in	• Chat ❌ • Video ❌ • Priority sorting ✅ • Assisted triage ❌	A physical appointment created either through patient-initiated flows or by a practitioner in Clinic.
Digital drop-in	• Chat ✅ • Video ✅ • Priority sorting ✅ • Assisted triage ❌	A digital appointment most often created by patient-initiated flows, but can also be created through a drop-in ticket in Clinic.
Telephone	• Chat ❌ • Video ❌ • Priority sorting ❌ • Assisted triage ✅	A digital appointment always created by a practitioner in Clinic where the main purpose of the appointment is a practitioner assisted triage.
Consultation	• Chat ✅ • Video ✅ • Priority sorting ✅ • Assisted triage ❌	A digital appointment always created by a practitioner in Clinic and is sent to a colleague or a role at a care unit. A consultation is always about a patient and can also refer to a specific appointment.

12.2.1. Scheduled visit type

A **Scheduled** visit type is a digital appointment that uses a previously created time slot in the **Time slots** workspace. When booking a scheduled visit, the time slots can also be filtered on tags if that has been used.

For more information about creating time slots and about tags, see Time slots [40]

12.2.2. Scheduled free visit type

When using a **Scheduled free** visit type, you decide for whom (named practitioner) the appointment should be booked. These time slots are not linked to the time slots you have added to the **Time slots** workspace in Clinic. Therefore, if you choose the **Scheduled free** visit type, you must at the same time book the time slot in your regular appointment book with the practitioner for which you have chosen to book the meeting.

12.2.3. Asynchronous visit type

An **Asynchronous** visit type allows the practitioner to chat online with the patient (send asynchronous messages).

> **NOTE**
> An asynchronous visit does not mean that you are booking the patient for an online appointment. If an online appointment is intended, use the visit types scheduled, scheduled free, video or telephone instead, depending on the need. For an overview of the different visit types, see Visit types [99].

12.2.4. Physical appointment drop-in visit type

A **Physical appointment drop-in** visit type is created either through patient-initiated flows or by a practitioner from Clinic.

As this is a physical appointment, there is no chat for either the patient or practitioner.

12.2.5. Physical appointment scheduled visit type

A **Physical appointment scheduled** visit type is created either through patient-initiated flows or by a practitioner from Clinic. It is also always connected to a time slot that has been created in Clinic.

As this is a physical appointment, there is no chat for either the patient or practitioner.

12.2.6. Telephone visit type

A **Telephone** visit type is created by a practitioner, and the chat is not visible for the patient. The main use case for this is when practitioners perform an assisted triage in Clinic on behalf of a patient. This means that the practitioner assists patients in being triaged when they cannot use the patient application themselves.

12.2.7. Video visit type

A **Video** visit type is a scheduled video call that does not include chat. The practitioner is able to invite other practitioners and external guests in advance.

12.3. Booking a scheduled appointment

When you book patients for appointments using the **Scheduled** or **Scheduled free** time slot types, the reason for the appointment must be stated. If you choose *Follow-up appointment*, the patient will not be asked any questions before the appointment when logging in to the appointment. If you choose to book an appointment based on a specific symptom or disease, patients will have to answer questions about that symptom/disease.

When you book patients based on the **Scheduled** or **Scheduled free** time slot types, the following steps will differ slightly, depending on the time slot type.

- **Scheduled** - do the following:
  1. Provide adequate details in the **Primary condition** field.
  2. To send a questionnaire to the patient, select the questionnaire in the **Survey** drop-down list. If a description has been added in the **Description of questionnaire** field in Content Studio, this description will be shown in **Survey** drop-down list.
  3. Write a short text on what the appointment is about (this text will be read by colleagues booked for the appointment before they begin with the appointment).
  4. Click **Next**.
  5. Select care unit and role.
  6. Select one of the time slots presented.
  7. Click **Next**.
  8. Click **Finish** and then **Close**.
- **Scheduled free** - do the following:
  1. Select date.
  2. Select time.
  3. Provide adequate details in the **Primary condition** field.
  4. To send a questionnaire to the patient, select the questionnaire in the **Survey** drop-down list. If a description has been added in the **Description of questionnaire** field in Content Studio, this description will be shown in **Survey** drop-down list.
  5. Make sure that the right care unit is selected.
  6. Select the role involved (e.g. doctor/nurse/psychologist, etc.).
  7. Select the Healthcare practitioners for whom the appointment is to be booked.
  8. Click **Next**.
  9. Click **Finish** and then **Close**.

12.4. Sending a provider-initiated asynchronous message

To send an asynchronous message to the patient:

1. Select appointment type **Asynchronous**.
2. Click **Next** and then **Submit** and select **Go to appointment**.
3. In the chat module, write and send the text message.
4. The patient will receive a text message with information on how to log in using the link provided in the text message, to read the message.
5. How much time patients have at their disposal to answer is shown at the top of the chat window. To prevent patients from answering, click **Change** and then **Exit Asynchronous Phase**.
6. By typing a reply in the chat or clicking **Mark as done**, the visit disappears from the log. Each time the patient writes in the chat, the appointment is activated and reappears in the ledger.

12.5. Book a video appointment

NOTE

Before starting, you need to be logged in to the Clinic user interface in Platform24. For information on how to log in to Clinic, refer to the Clinic User Manual.

In Clinic it is possible to book a video appointment with a patient. The booking function can be accessed through an ongoing or finished digital appointment, through the patient profile or by searching for the patient in Clinic.

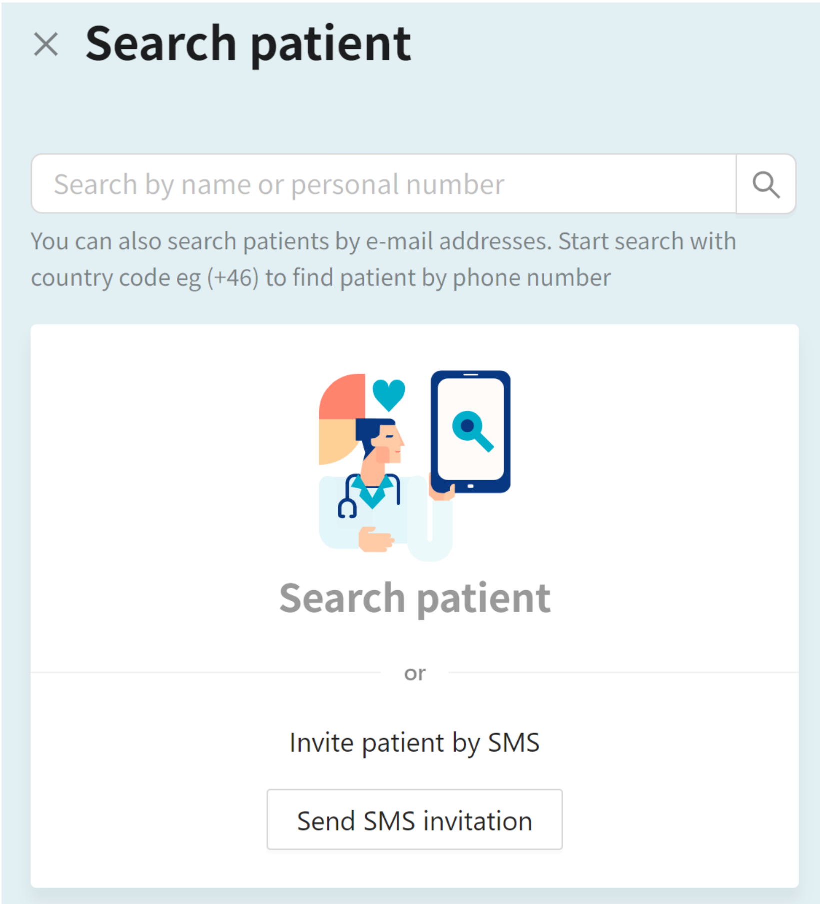
To book a video appointment via the appointment view or via the patient profile:

1. Click the **New** button.

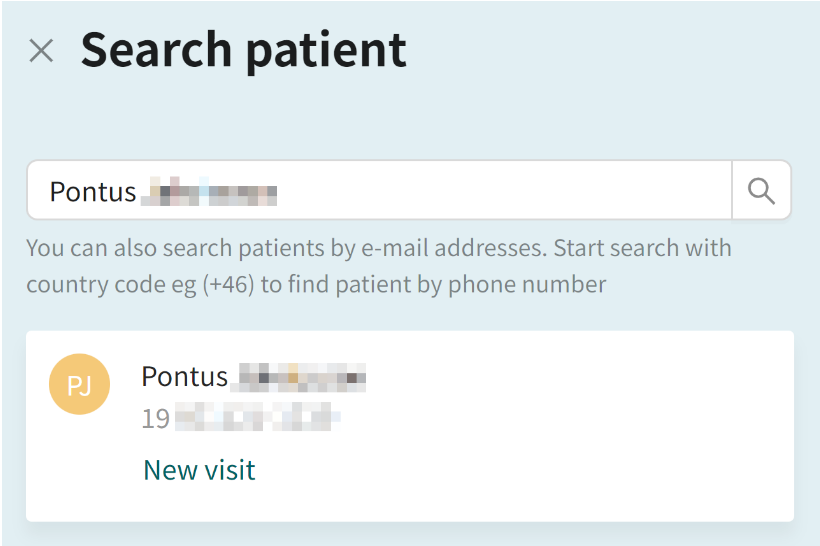
2. Continue with step 4 in the instruction below.

To book a video appointment by searching for the patient in Clinic:

1. Click on **Search patient** button in the left menu bar.



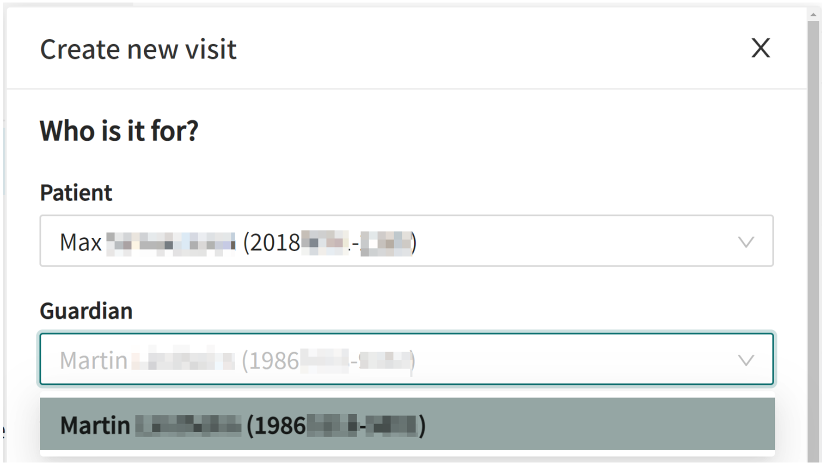
2. Write the name or unique personal identifier of the patient in the **Search patient** field and click the search icon or press enter.



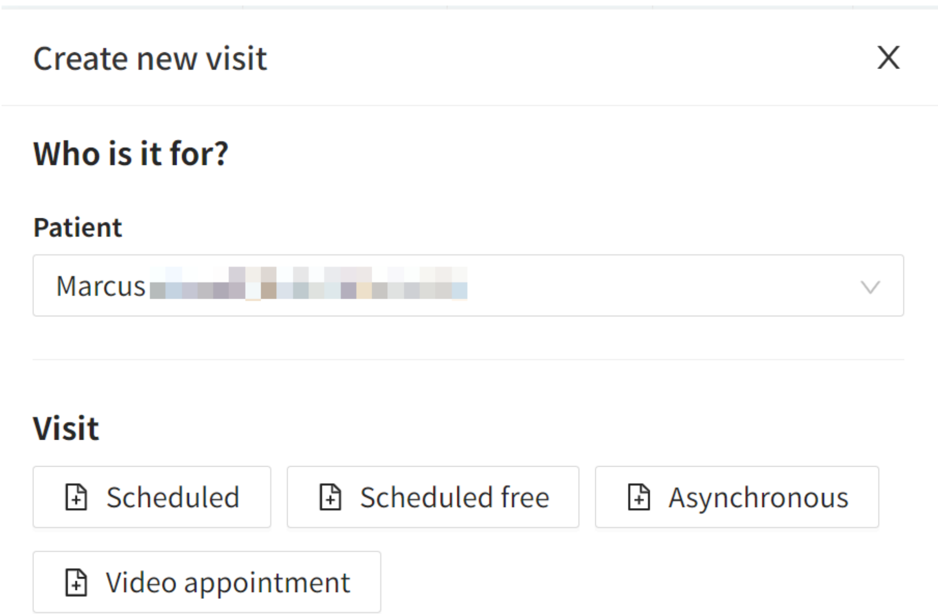
3. Click **New visit** below the patient's name in the search result.

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

4. If the patient is a child, select the guardian of the child under **Guardian**. This option is only displayed if the patient is a child. If a guardian is added, this person will receive the the booking confirmation and reminders for the scheduled video appointment. The video appointment will also be visible in the guardian's Patient application.

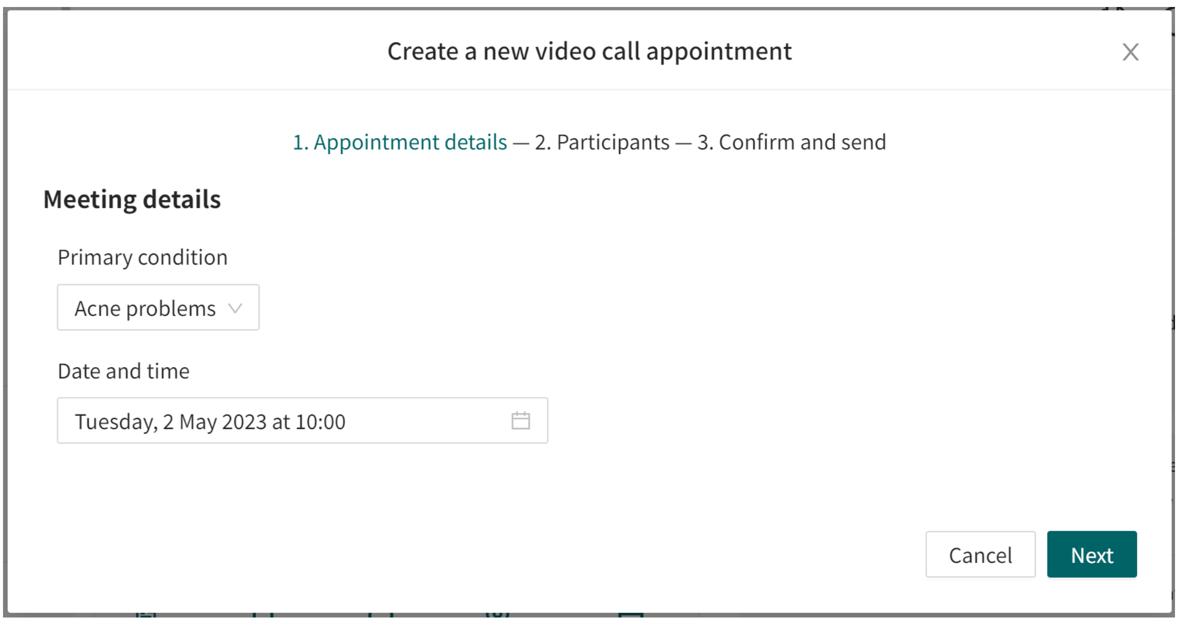


5. Click the **Video appointment** button.



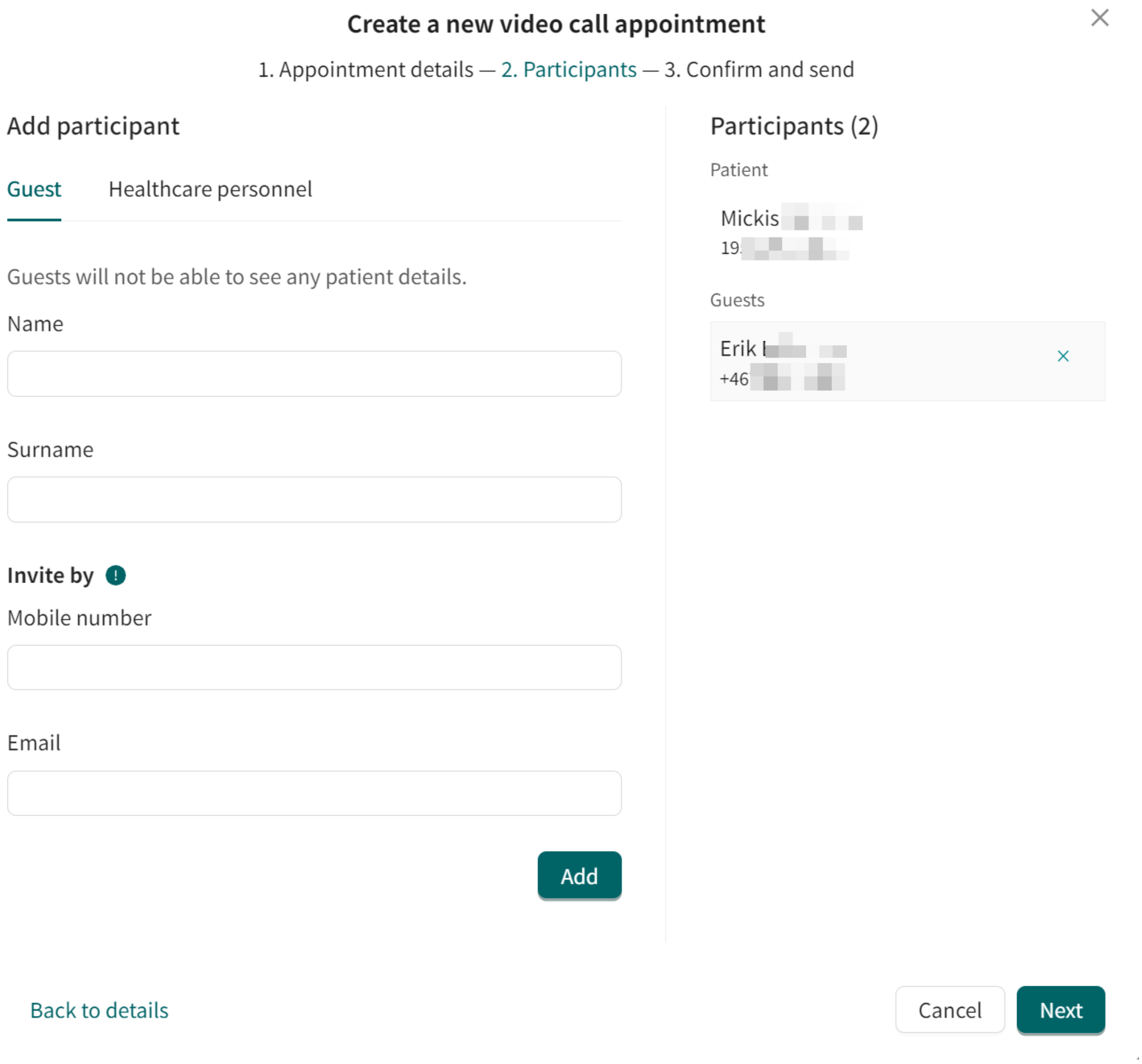
6. Enter the **Primary condition** and select a **Date and time** for the appointment.

NOTE
Double-check with the ordinary schedule to avoid double bookings.

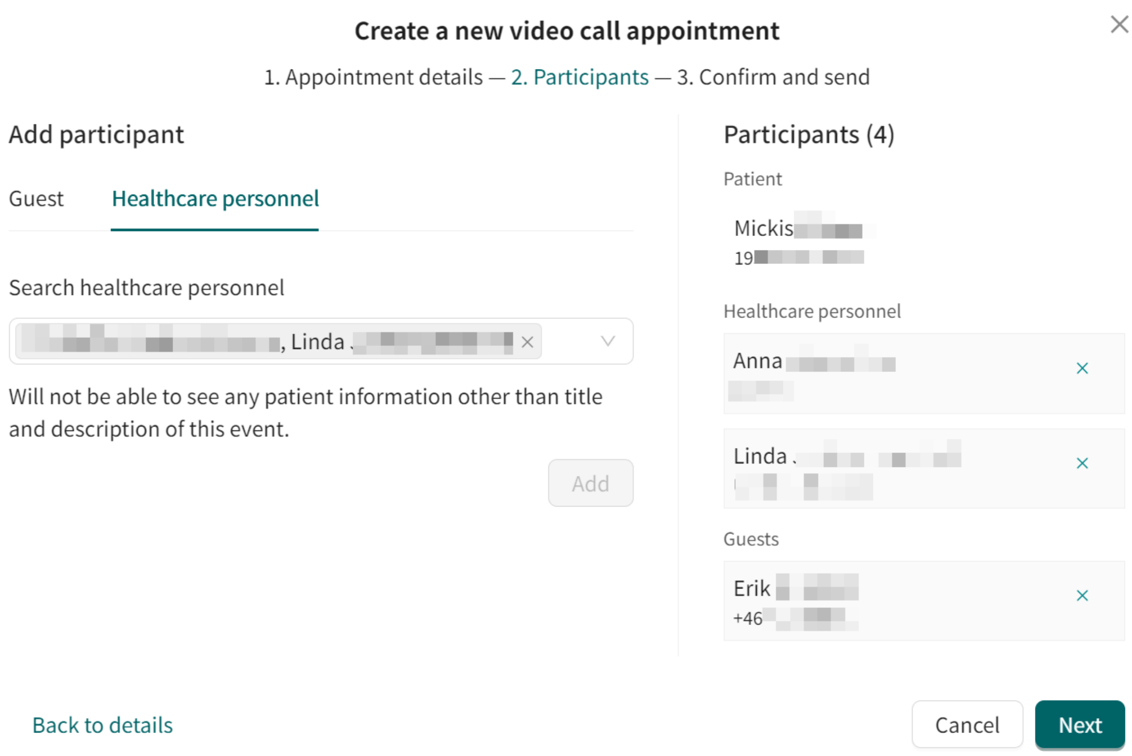


7. Click **Next**.

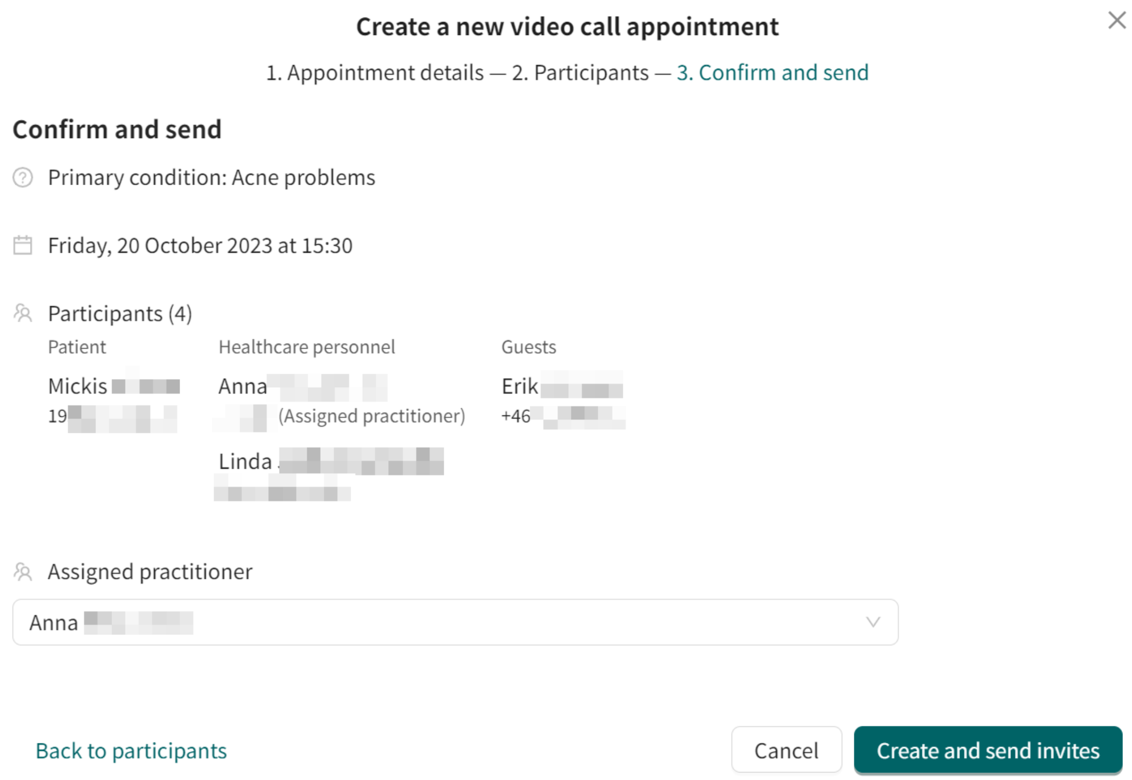
8. If desired, additional external guests can be added to the appointment in the **Guest** tab. The guests can be invited by **Mobile number** and/or **Email** by filling in the corresponding fields. Click **Add** to add the guest.



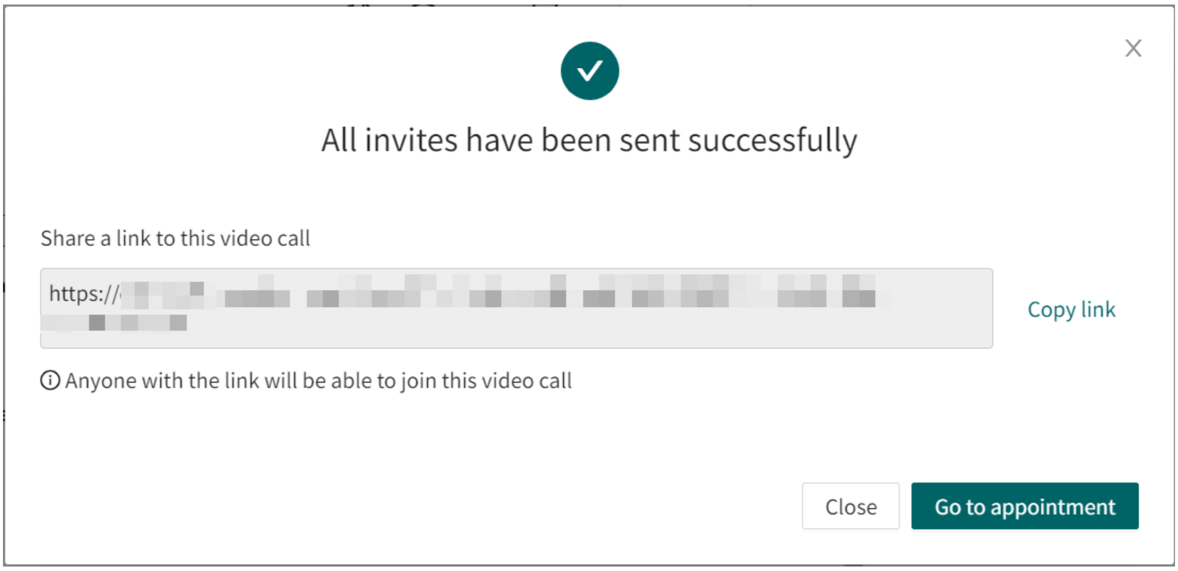
9. Add all practitioners that should take part in the appointment via the **Healthcare personnel** tab. The practitioners can be found via the **Search healthcare personnel** field. Click **Add** to add the practitioners.



10. Click **Next** and select the owner of the video appointment in the **Assigned practitioner** drop-down list.



11. Review and verify that all details are correct.
12. Click **Create and send invites** to complete the booking, or **Cancel** to cancel the booking.
13. When a booking has been completed, a confirmation will be displayed. All invited guests will receive a unique link via sms and/or email. A general link to the appointment is also created, and can be used by for example in interpreter. Click the **Copy link** button to copy the link to the meeting.



14. Click **Close** to close the booking view, or **Go to appointment** to go to the appointment view for the visit.

13. Rebooking a patient

13.1. Change time or cancel appointment

The **Booked on** column in the ledger has a box with a “pen icon”. Click on it to edit a booking. This will offer you two options: **Change time** or **Cancel appointment**.

What happens when you click **Change Time** depends on how the appointment is booked. If the appointment is booked using the **Scheduled** timeslot type, a window pops up showing available timeslots which can be selected. If the appointment is booked using the **Scheduled Free** timeslot type, you will actively need to change to a new time of your choice. If the appointment was scheduled in an external system, you can neither cancel nor rebook it from Clinic, it should be managed in the external system.

NOTE

If changing the time booked using the **Scheduled Free** timeslot type, also remember to cancel the appointment in your regular appointments book and there also book the new time.

13.2. Appointments booked by healthcare practitioners

In order to clearly distinguish between appointments booked by healthcare practitioners and appointments booked by patients themselves, this will be clearly visible in the **Medical record notes**, see also Appointments booked by healthcare practitioners [78].

- The text written by the healthcare practitioner at the time of booking will be presented under the medical record notes in a separate “box”.
- The “box” is missing when a patient is booked using a **Scheduled free** timeslot type. The free text option is not available for such a booking at the time of booking.

14. Receiving and conducting an online appointment

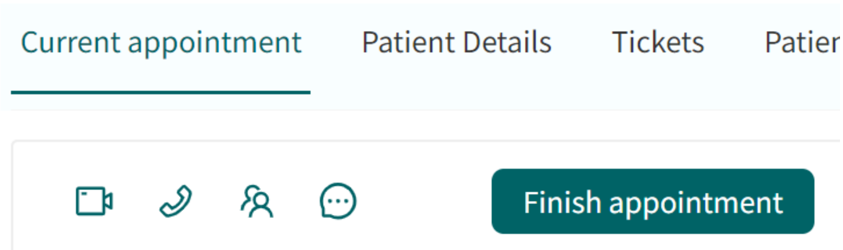
14.1. Receiving the patient

1. Click **Receive** in the ledger.
2. Click **Receive Patient** in the window that opens.
3. After reading the patient's history, click **Start appointment**.
4. An automatic welcome phrase is sent in the chat.
5. Start chatting with the patient.

The following features can be used during an online appointment:

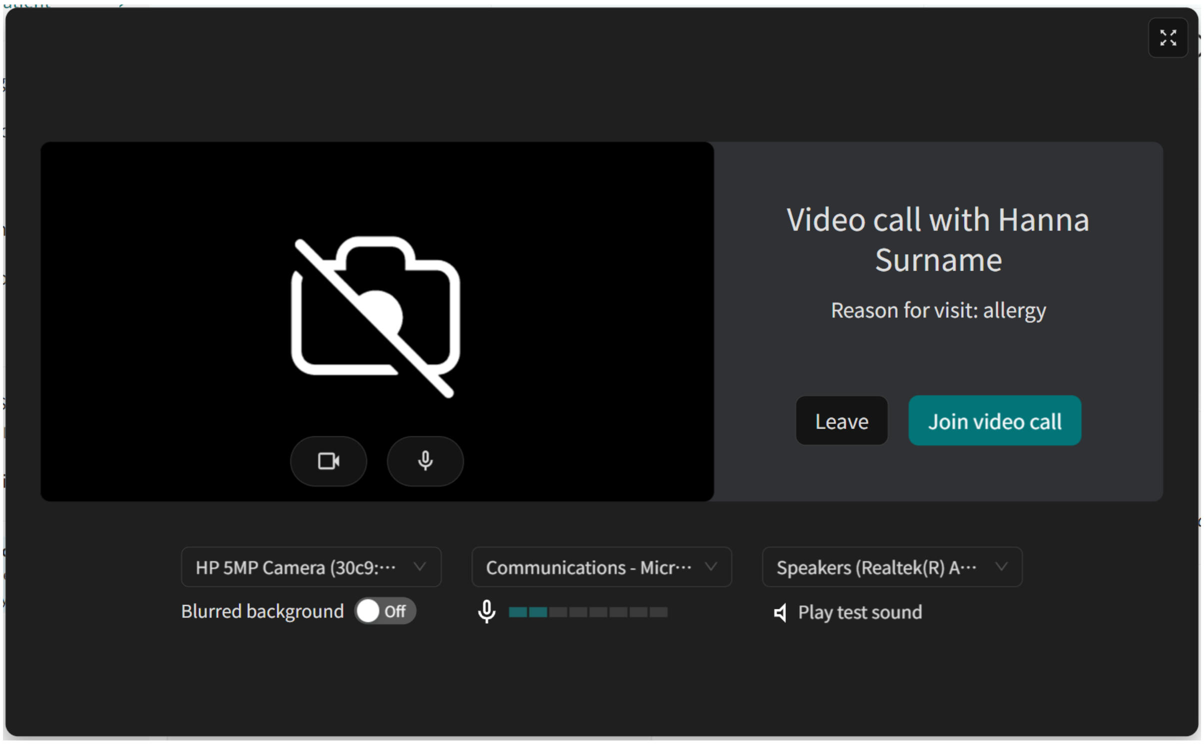
14.2. Video calls

- A video call is started by clicking the video icon ( ) in the chat of a scheduled appointment.



- If you schedule a video call (by selecting **Video** as visit type) it does not include chat, but it is possible to invite other practitioners and external guests in advance. For information on how to book a video appointment, see Book a video appointment [102].
  To start a video call from within a scheduled video appointment, you first start the appointment, receive the patient and click on the **Join the video call** button in the chat.

- Video calls can only be started and ended by healthcare practitioners, never by patients. However, patients must agree to share audio and video in order to join video calls.
- If patients have turned off their audio, this is indicated by a crossed-out microphone icon at the center of the video image.
- If the patient refuses the call, information about this is displayed.
- If the patient cannot be reached, information to this effect is displayed.
- The camera, microphone and speakers can be set and tested before entering the video call.



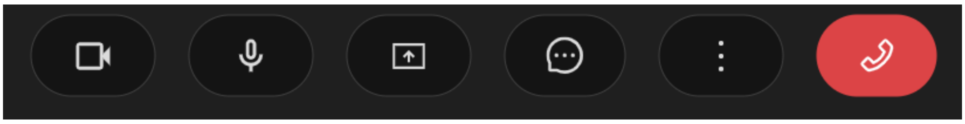
- During video calls, the video window can be moved with the mouse pointer by left-clicking over the video window and by moving it to the desired position.
- In the the upper right corner of the video window, there is a button to extend the video window to full screen mode.

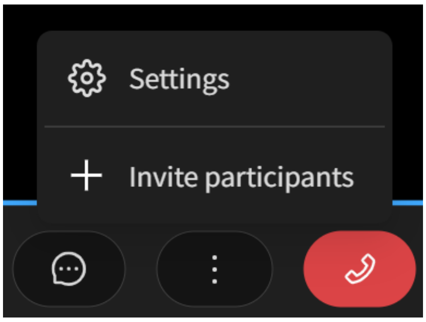
  To restore the video window to standard mode, click the restore button in the upper left corner.

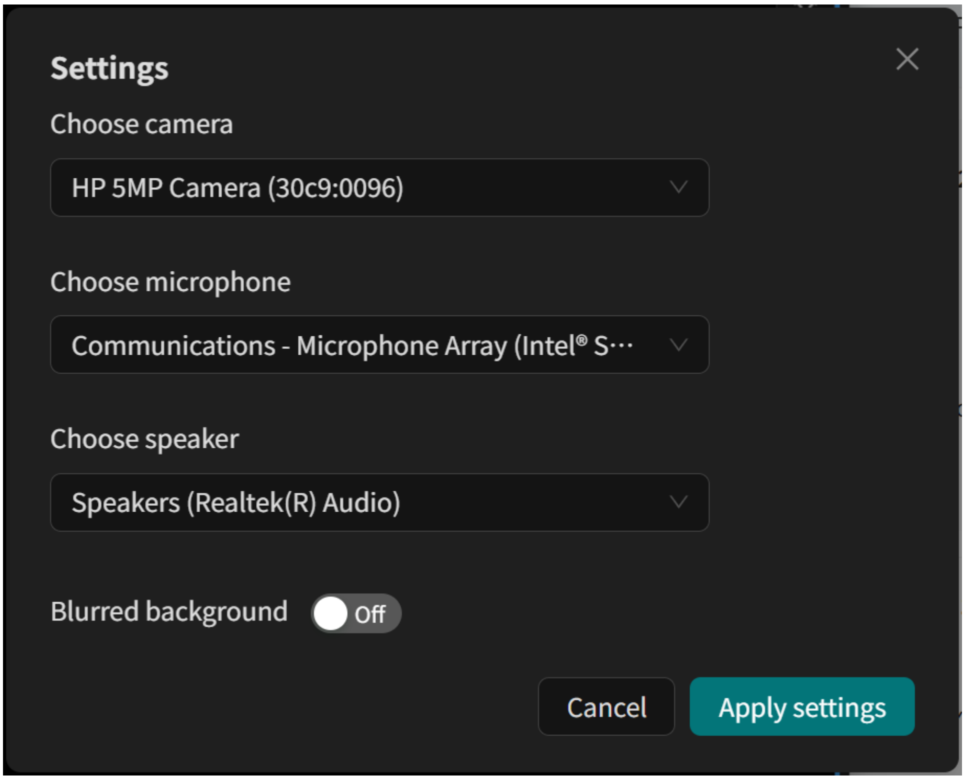
  

- In the lower part of the video window, there are buttons to disable the video feed, mute the sound, share your screen, open the video call chat, show more options (three dots button) and end the call.

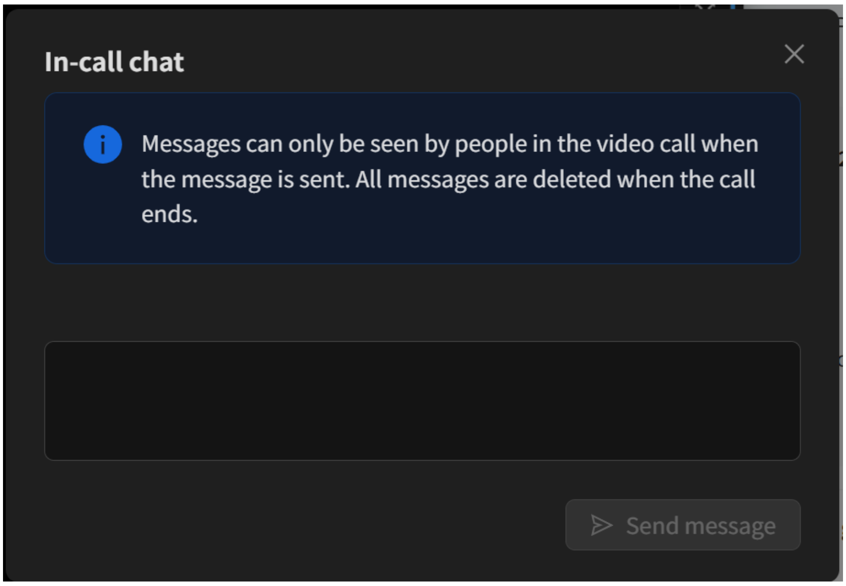
  

- Via the three dots button, you can invite more participants or open the **Settings** dialog where you can edit the audio and video settings.



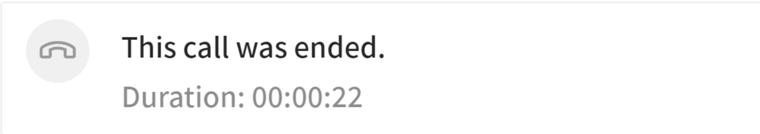


- In the video call chat you can write messages to the participants in the video call.



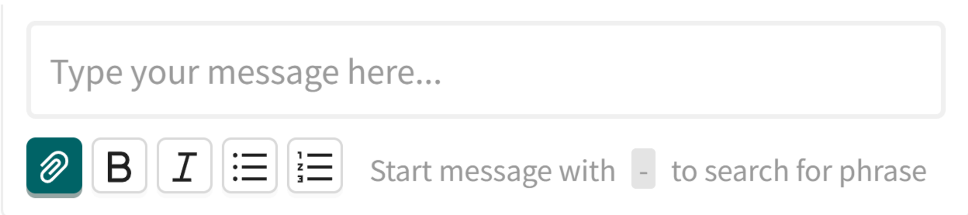
- When you end the video call, you will have the opportunity to rate the technical quality of the video call. This report is sent for analysis to Platform24.

- Ongoing and completed video calls are displayed as a message in the chat, which also shows the duration of the video call.



14.3. Sending images or PDF files to patients

The attach file icon ( ) in the lower left corner of the chat window allows you to upload images and PDF files in the patient chat. The chat may seem slow if the files exceed 1 to 2 MB. Maximum file size that can be sent is 10 MB.



NOTE

Some receiving units do not support these file uploads.

14.4. Receiving images or PDF files from patients

When the patient uploads images or PDF files, they can be viewed in the **Uploads** tab in the current appointment.

For more information, see Uploads [78].

14.5. Three-way calls

- You can invite other healthcare practitioners to the video call with the patient. To do so, click the plus sign, click **Add** in the list or use the search function if the person you are searching for is not visible, and click on the invitation. The receiving party will then receive notification with a link that takes them to the consultation window. This will then be highlighted in Clinic.

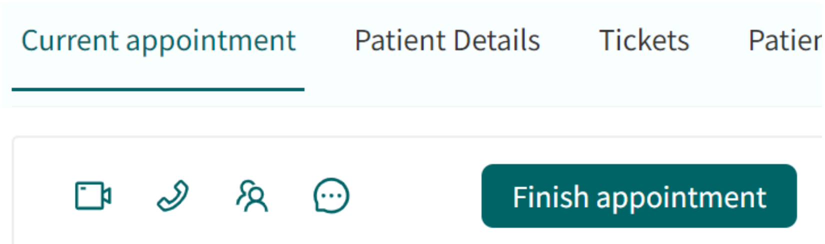
NOTE
The three-way call feature is enabled for certain care units. If this feature is not enabled, contact the account manager at Platform24.

- You can also invite a person without a Clinic login to a video call using a phone number. This could be a healthcare practitioner, an interpreter or a relative of the patient. The person will then receive a link via text message that allows them to join the call. This person will only see the video call and not the chat.

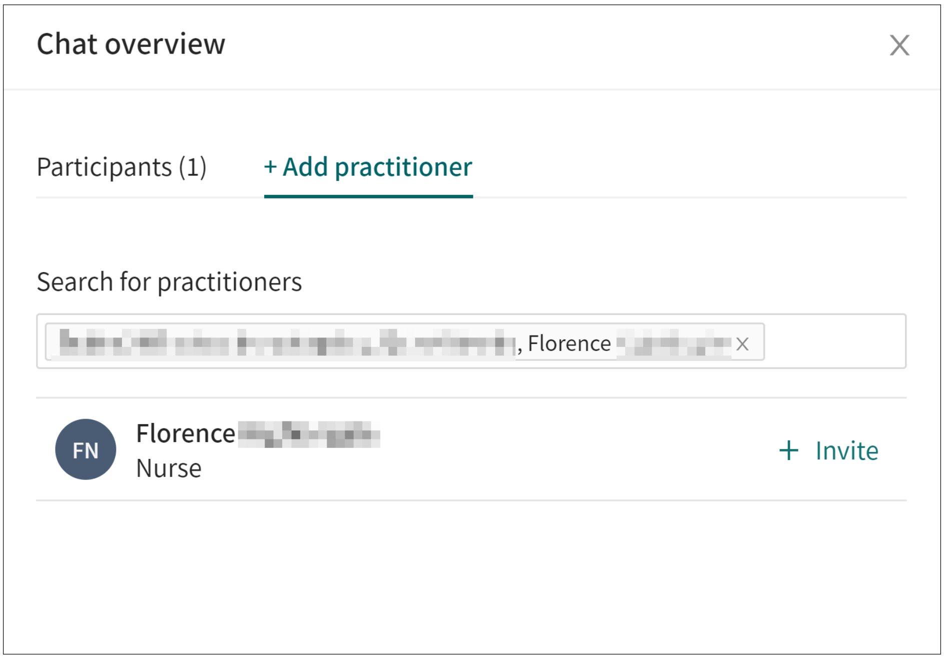
14.6. Inviting colleagues to chat

14.6.1. Inviting colleagues to patient chat

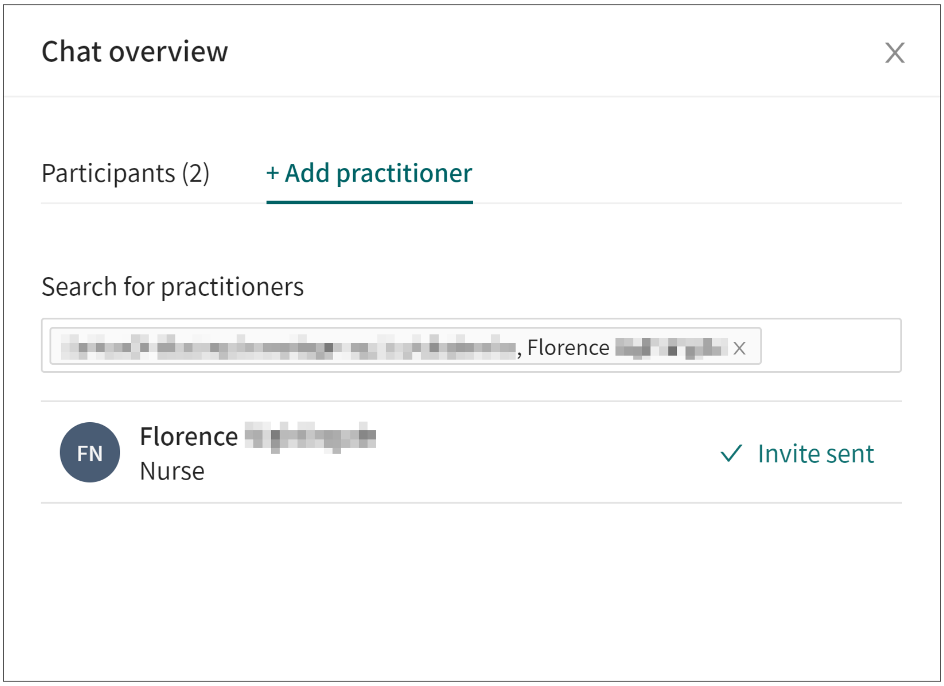
1. Click on the “twin icon” ( ) in the upper part of the chat.



2. In the chat overview, search for the colleague to invite. Hover over the name and click **Invite**.



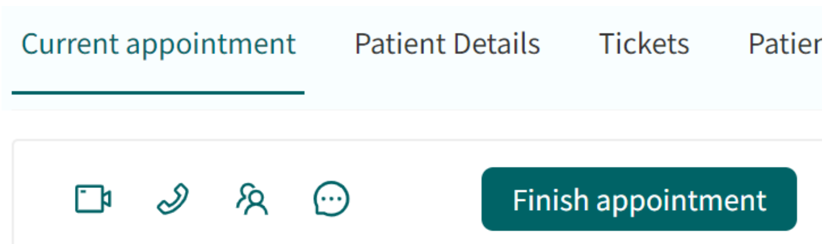
3. You have now invited your colleague to the patient chat.



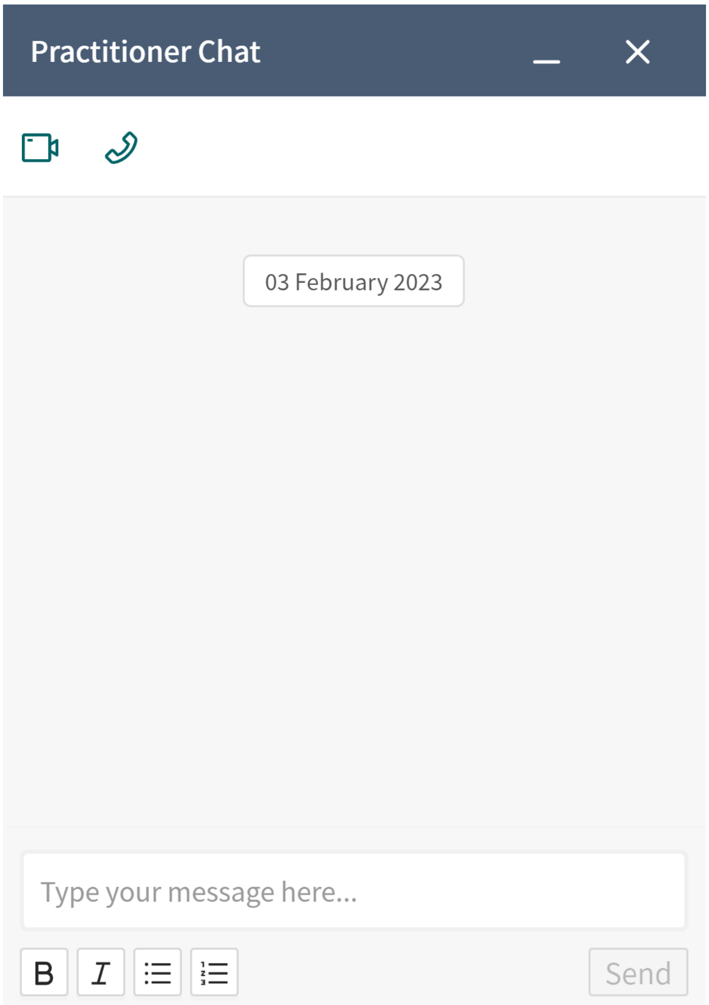
14.6.2. Inviting colleagues to practitioner chat

> **NOTE**
> The patient cannot see this chat.

1. After inviting the colleague to the patient chat, click on the “chat bubble” ( ) in the upper part of the chat to open the practitioner chat.



2. The practitioner chat is displayed in the lower right corner and here you can chat with the colleague.

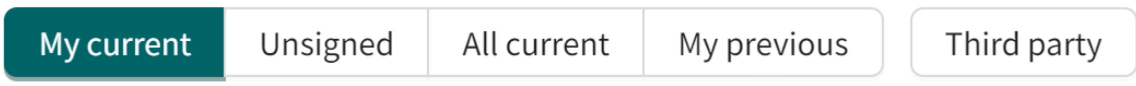


3. New messages are indicated by a number.

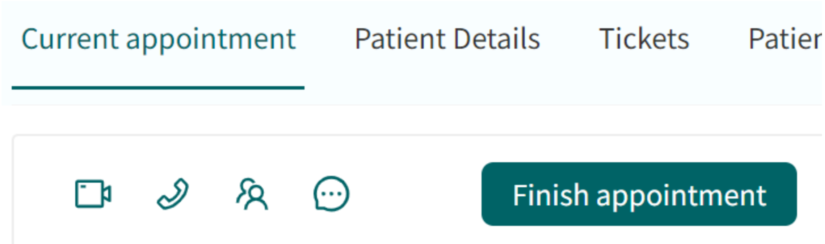
14.6.3. Seen by colleagues invited to chat

If you have been invited to a patient chat:

1. A pop-up window appears in Clinic.
2. A new tab appears called **Third party**.



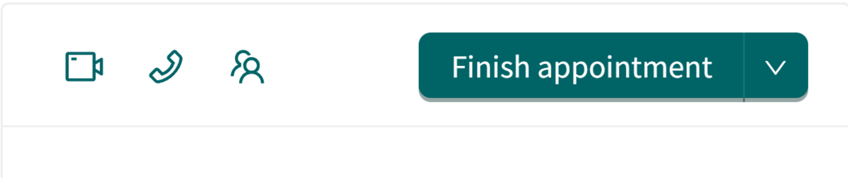
3. Select the tab and click on the current patient to open the patient chat.
4. Click on the chat icon ( ) to also open the care provider chat.



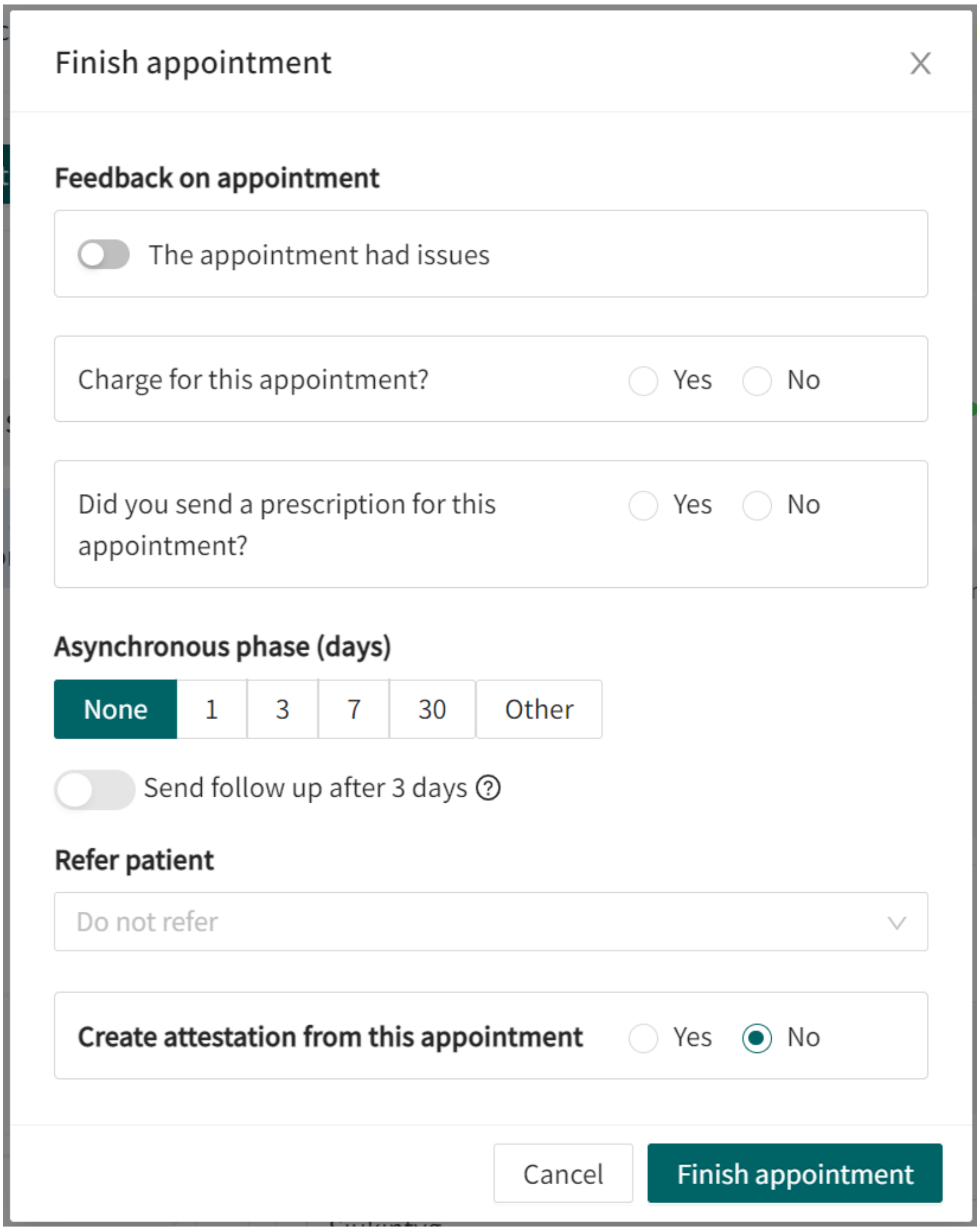
14.7. Ending appointments

If your care unit has an asynchronous period (a period after an ended appointment when the patient can chat in the asynchronous phase of the same appointment), this will be displayed above the chat window. Click **Change** to prematurely end the asynchronous period, and then select conclude asynchronous phase.

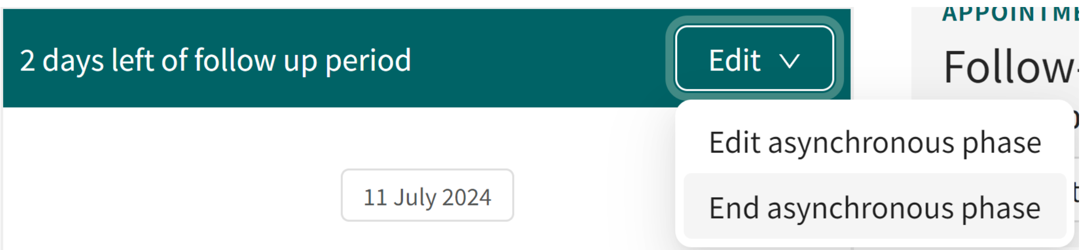
To end the appointment, click on the **Finish appointment** button above the chat.



This opens the **Finish appointment** dialog.

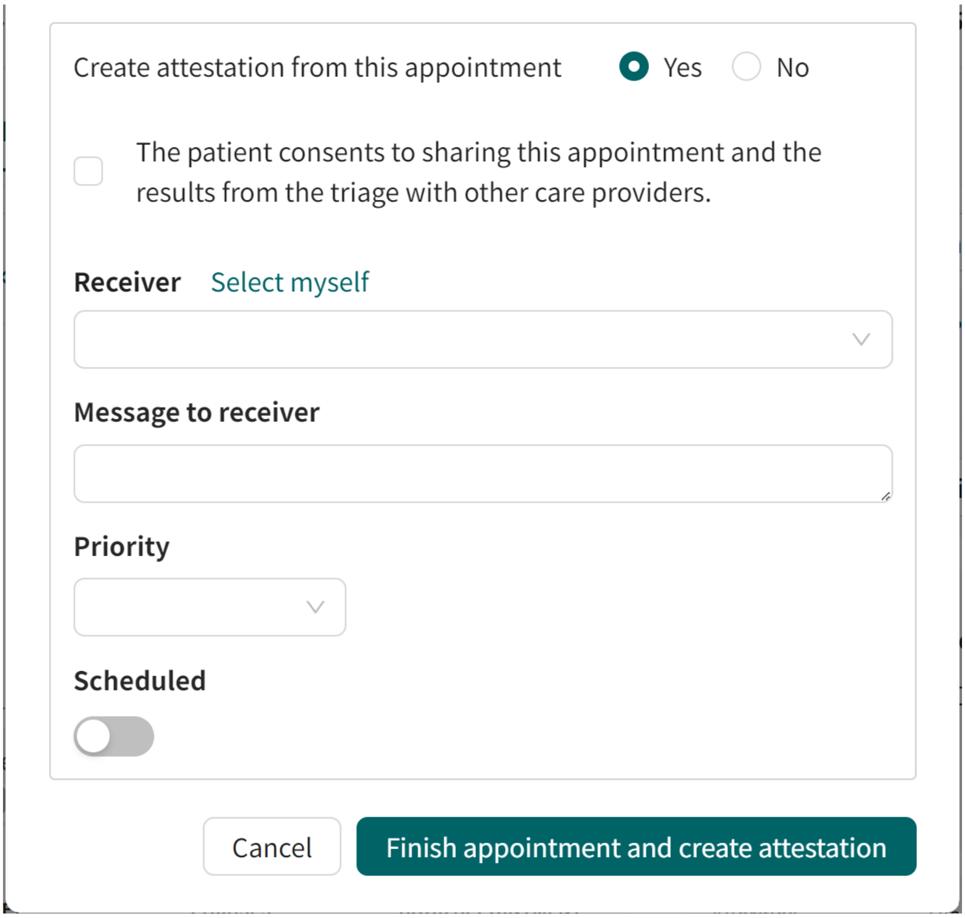


- Set an asynchronous phase
  When an appointment is ended, you can choose to set an asynchronous phase for the patient, if the care unit has chosen to enable this. The preset intervals are 0 (None), 1, 3, 7 or 30 days. To set any number of days, select the Other option and enter the required number of days in the field. Enable Message if a follow-up message is to be sent to the patient after a selected number of days, asking how they are doing.



- Creating an attestation

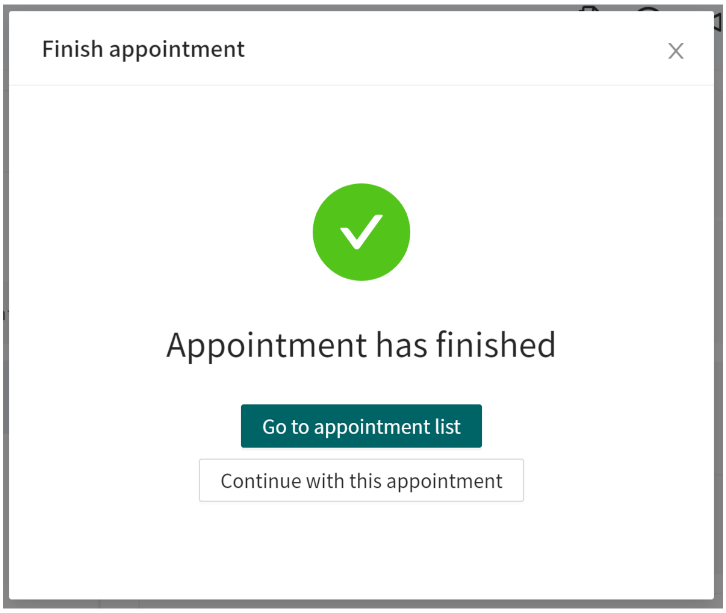
It is possible to create an attestation at the end of the appointment, if the care unit has chosen to enable this function. Then enable **Create attestation from this appointment**.



Select a resource from the **Receiver** list or assign the attestation to yourself by selecting **Select myself**.

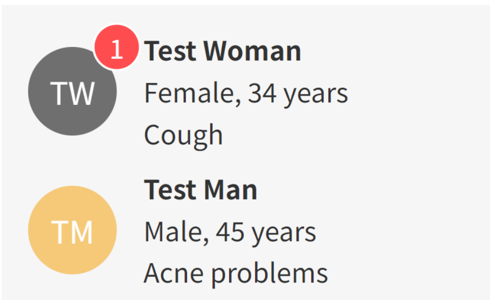
- Click **Finish**.

  After ending an appointment, you will be given the choice to **Go to appointment list** or **Continue with this appointment**. If you choose to continue with the current appointment, you will remain in the chat and can complete your medical record note, click on **Sign and export**, and then paste the text into your regular journal system.



14.8. Parallel chats

You can have several parallel chats ongoing at the same time. During the patient chat, you can return to the home page and receive a new patient. When you are in a patient chat, you see all your ongoing appointments on the left, and can navigate between the different appointments in the chat module. Every time a patient sends a message in the chat, you will clearly see it even if you are in another patient chat, as the patient who sent a new chat is highlighted.

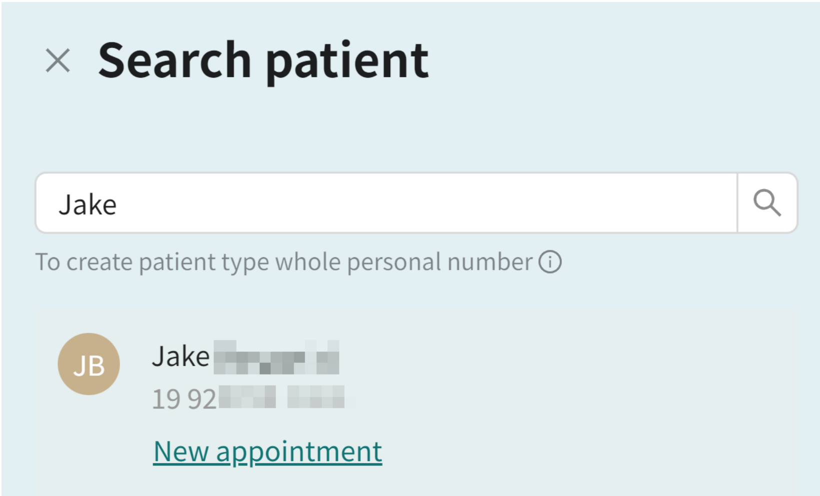


15. Creating and conducting an offline appointment (physical appointment)

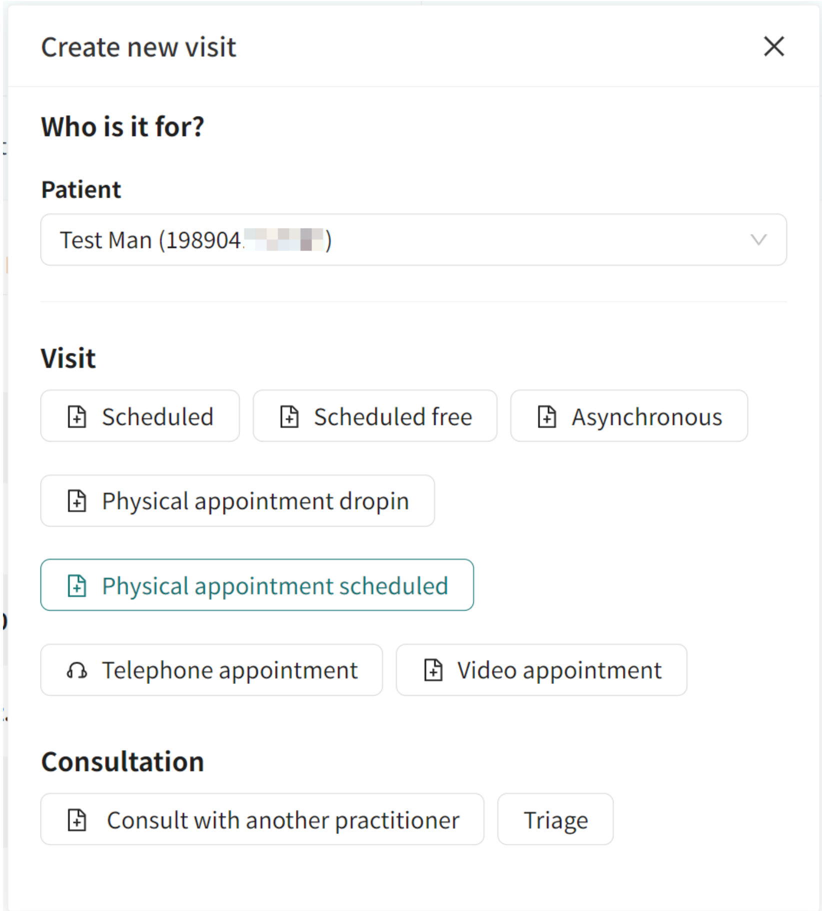
Healthcare practitioners in physical care units can set up appointments for patients who do not have access to the Patient app or to their unique personal identifier when they visit the physical care unit.

The main difference between an online and an offline (physical) appointment is that the offline appointment does not have chat and video. To create an offline appointment:

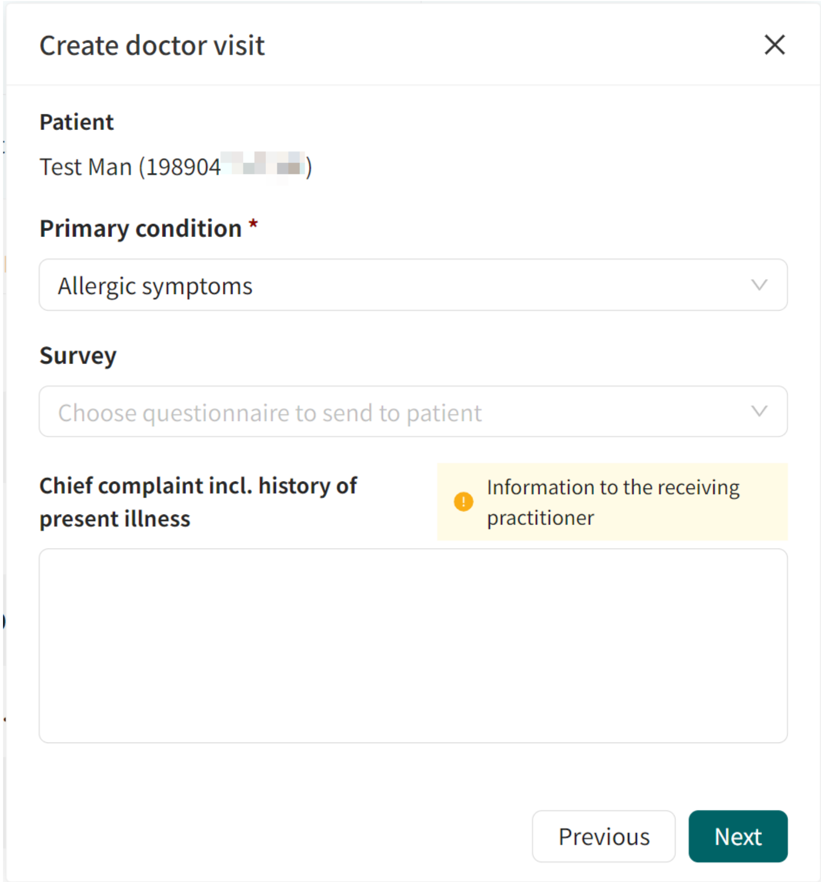
1. Find the patient or register a new patient if they are not in the system.
2. For an existing patient, click **New appointment** below the patient name in the search result.



3. Select **Physical appointment scheduled** or **Physical appointment dropin**.

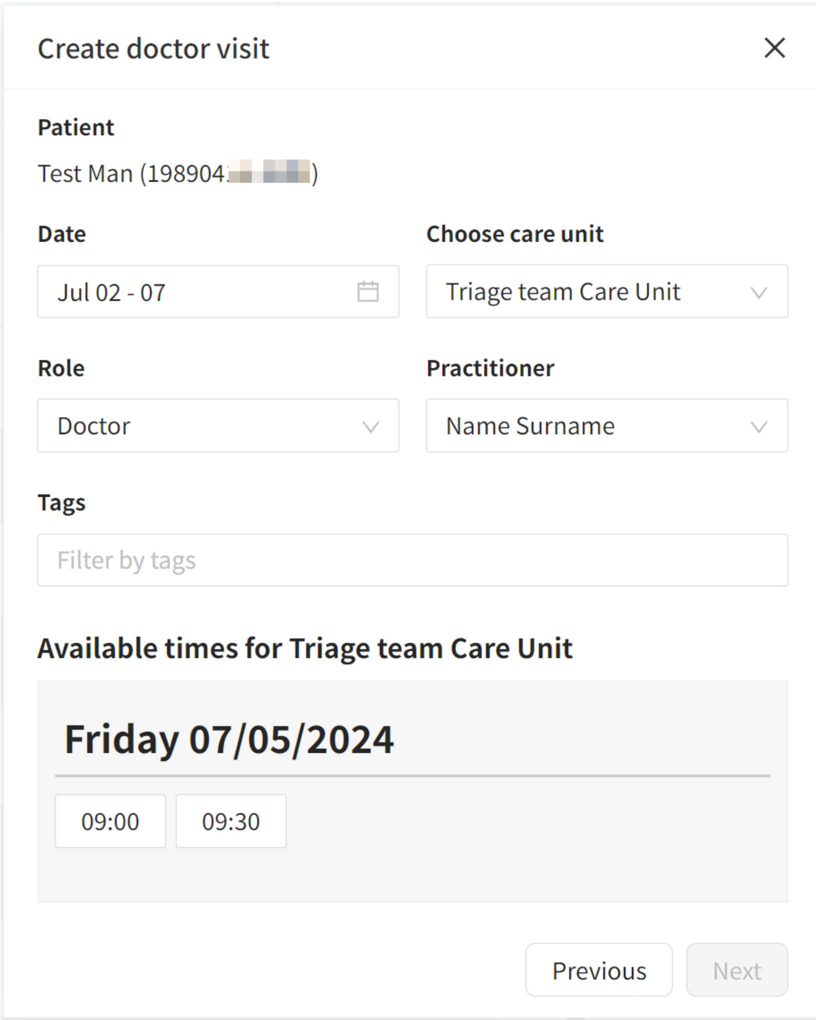


4. Specify the reason for seeking care and medical history.

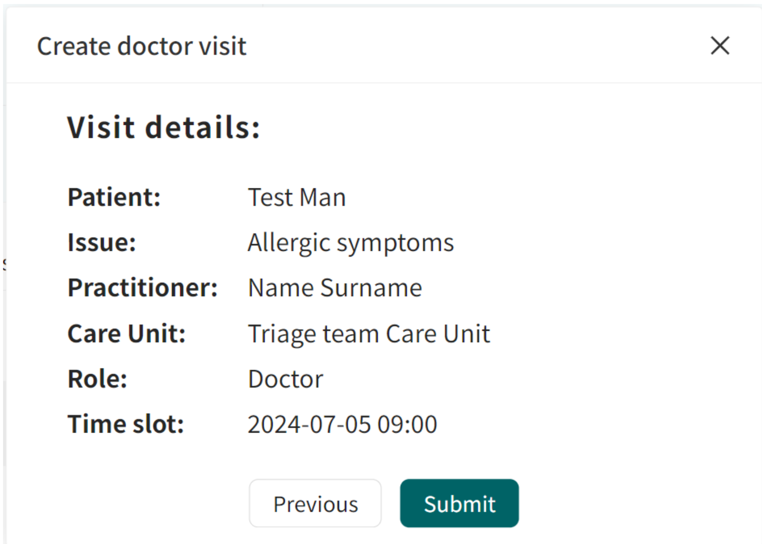


5. Click **Next**.

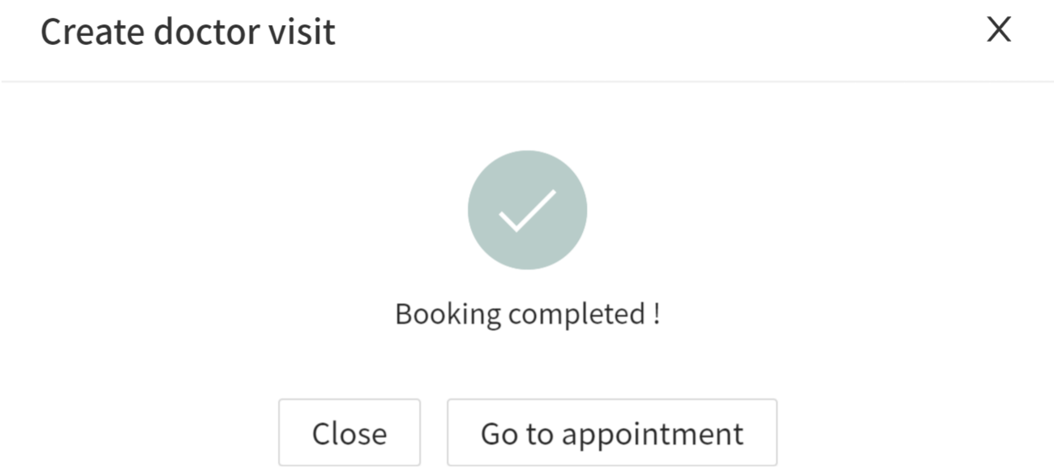
6. Change care unit (**Select care unit**) and role (**Role**) if necessary and select a free time slot.



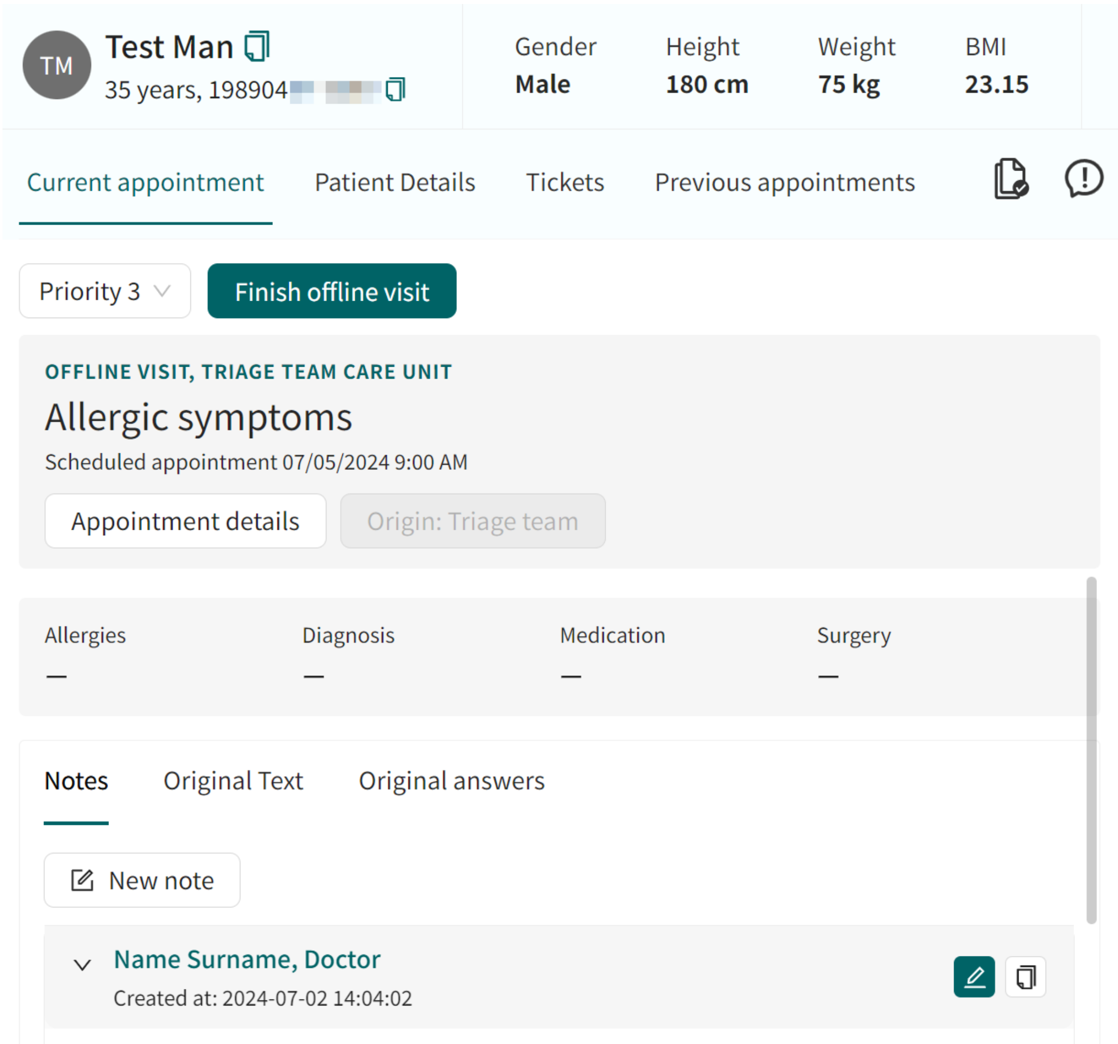
7. Click **Next**.
8. Check the information in **Appointment details**, if it is correct click on **Finish**.



9. A confirmation window appears with two choices, **Close** or **Go to appointment**.



   a. Click **Go to appointment** to go directly to the booked physical appointment and receive the patient.



   b. Click **Close** to close the confirmation window.

16. Handing over or transferring appointments

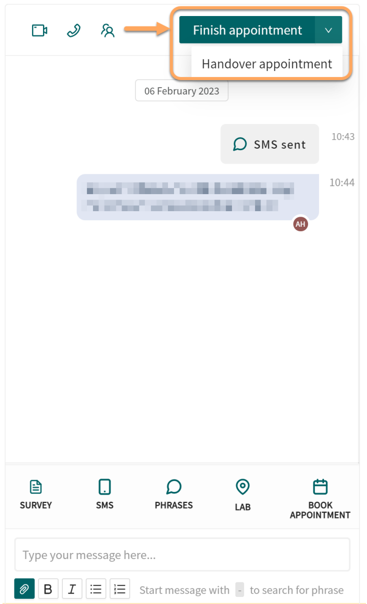
16.1. Overview

The **Hand over appointments** feature enables a care provider to move an appointment to another role or specific care unit during a synchronous appointment. (**1** in image below)

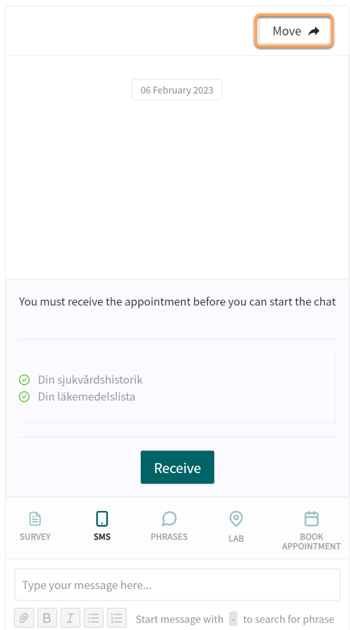
An appointment can also be moved to another role or care unit before the appointment is initiated, and this is done by using the **Move** button at the top right of the chat module. (**2 a** and **2 b** in image below).

A typical example of why the function can be required is: “A nurse receives a patient and realizes that the appointment should be handled by a doctor. Both the patient and the doctor are available at the moment, so the appointment is handed over to the doctor who takes over and continues the consultation.”

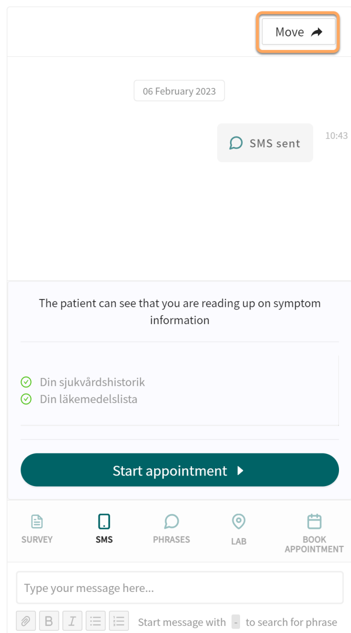
1. Handing over an appointment during a synchronous appointment



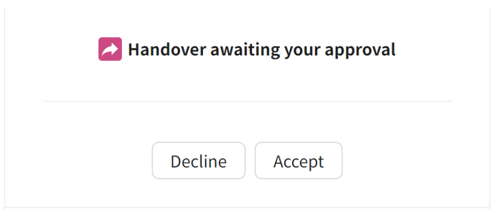
2 a. Handing over an appointment before the appointment is initiated, before clicking **Receive**.



2 b. Handing over an appointment before the appointment is initiated, after clicking **Receive**.



To reduce the risk of an appointment being lost in handling, the person receiving the appointment must approve the transfer/handover before it is removed from the original healthcare practitioner's list

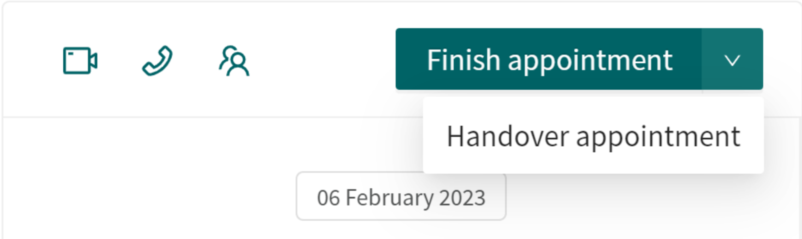


In the Patient app, the transfer process is displayed as a system message, e.g. “Care unit A has transferred the appointment to care unit B”. The patient will also receive a text message informing them that a new care unit has taken over the appointment.

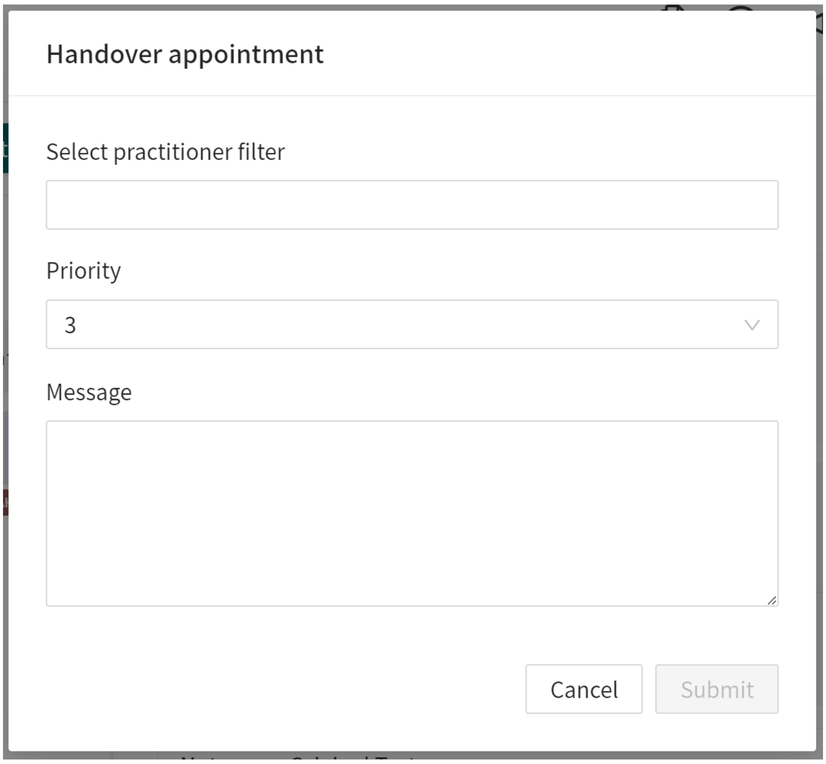
16.2. Handing over during an ongoing synchronous appointment

To hand over an appointment to another healthcare practitioner during an ongoing synchronous appointment:

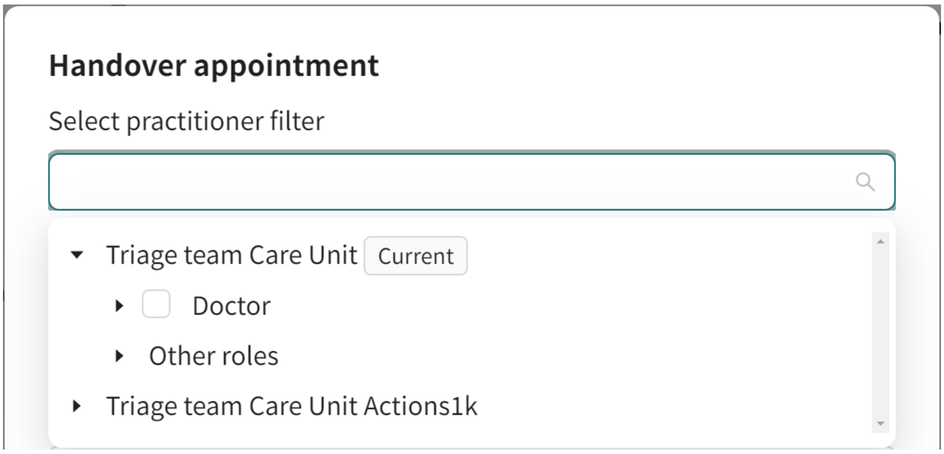
1. Click on the arrow next to **Finish appointment** and select **Handover appointment**.



This opens the **Handover appointment** dialog.

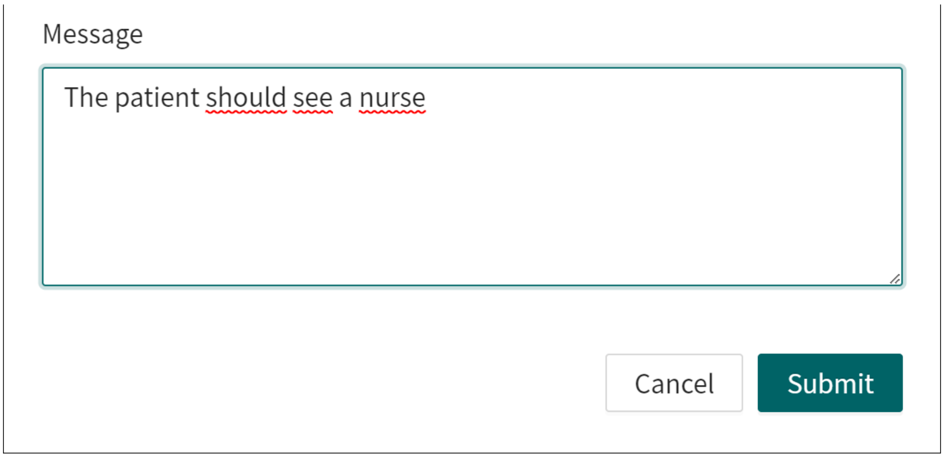


2. Select the receiving practitioner via the **Select practitioner filter** drop-down menu. Your own care unit is marked as **Current**.



NOTE
If you know the name of the person you want to hand over to, you can search directly for their name go directly in the **Healthcare practitioners** field.

3. Enter a message for the receiving party in the **Message** field. This information is not displayed to the patient. Why a patient is being handed over is only available between healthcare practitioners.

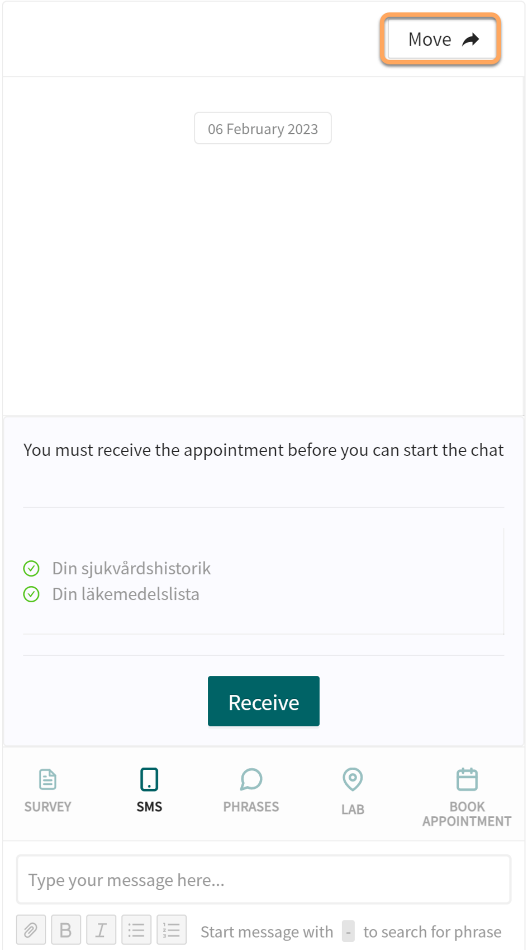


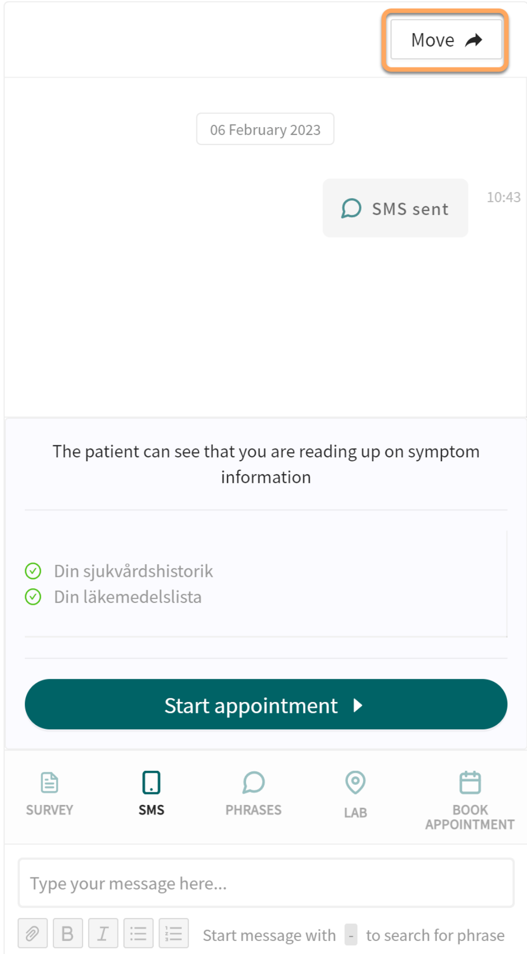
4. Click **Submit**.

16.3. Transferring appointment before receiving

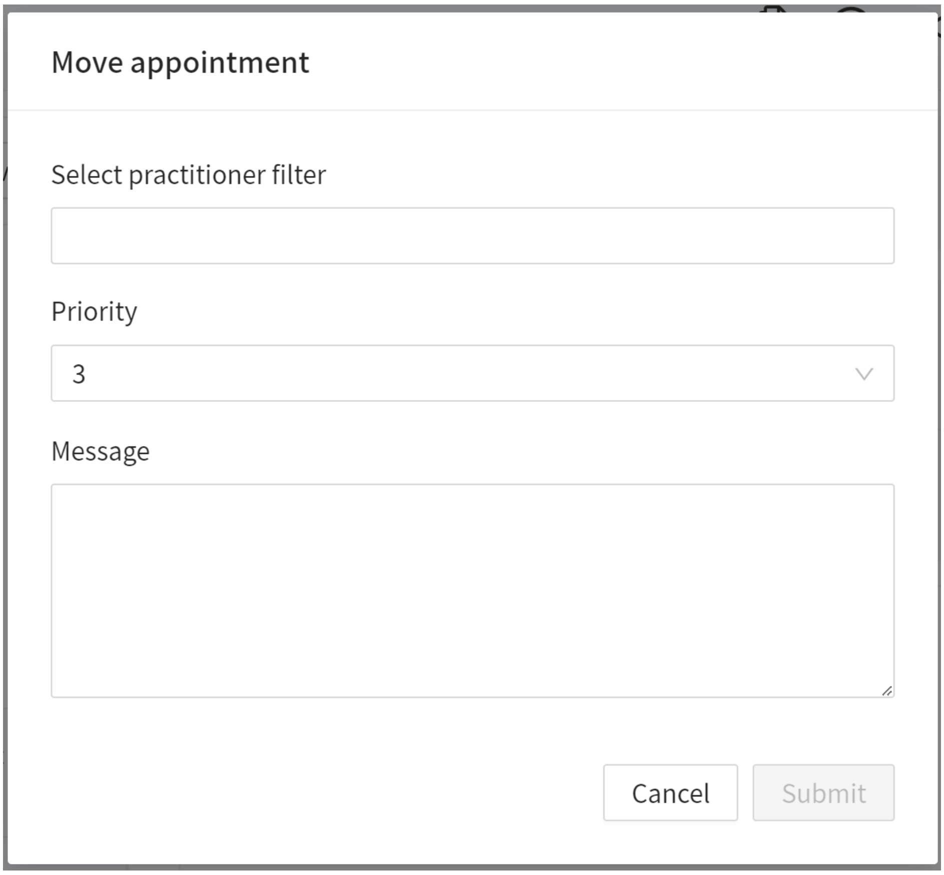
To transfer appointments to other healthcare practitioners before an appointment has been received:

1. Click on the **Move** button at the top right of the chat module.

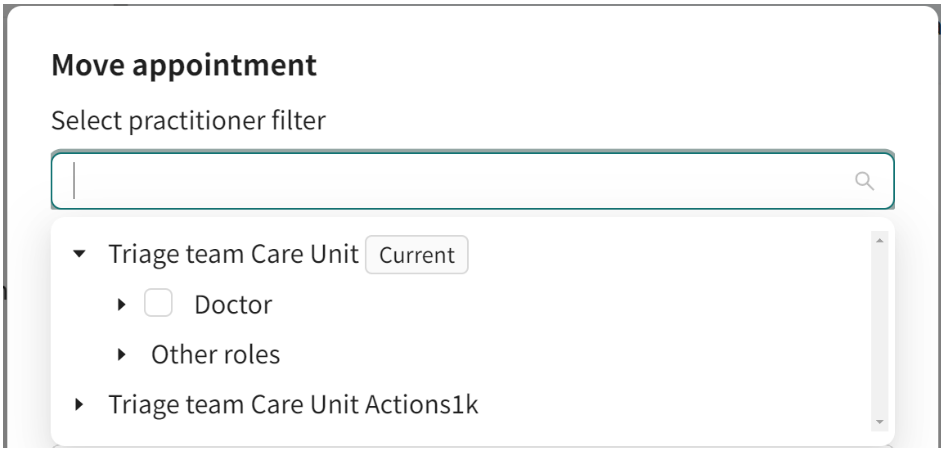




This opens the **Move appointment** dialog.

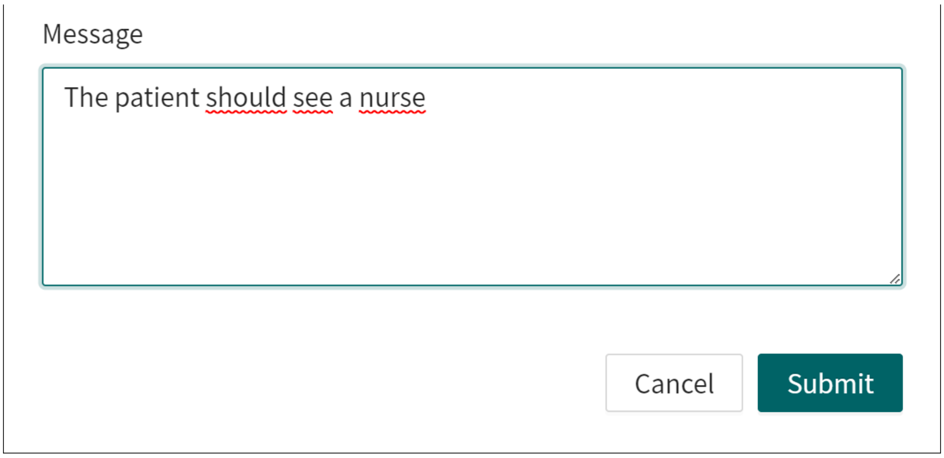


2. Select the receiving practitioner via the **Select practitioner filter** drop-down menu. Your own care unit is marked as **Current**.



NOTE
If you know the name of the person you want to hand over to, you can search directly for their name go directly in the **Healthcare practitioners** field.

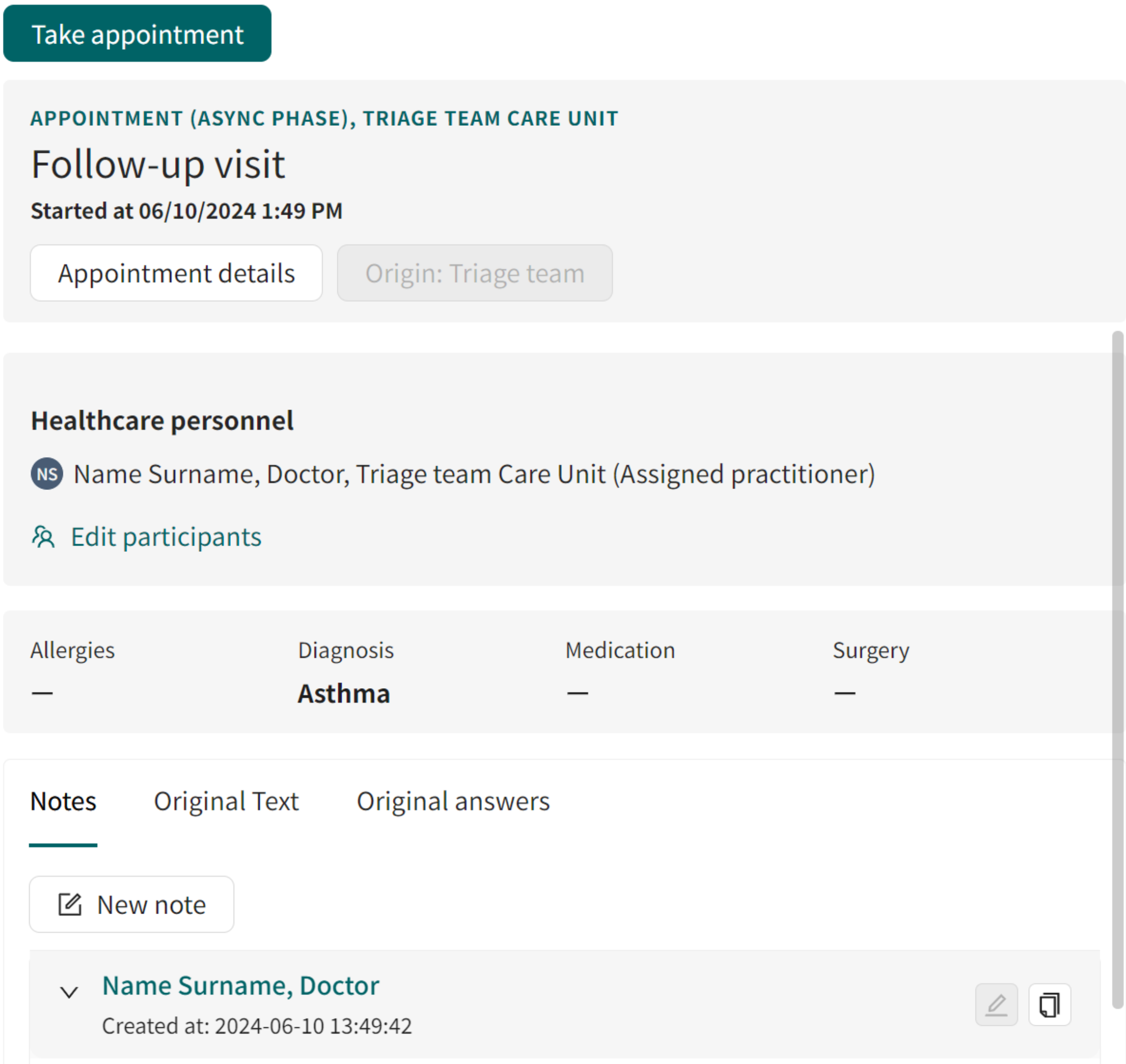
3. Enter a message for the receiving party in the **Message** field. This information is not shown to the patient. Why a patient is being handed over is only available between healthcare practitioners.



4. Click **Submit**.

17. Taking over an asynchronous appointment

1. To take over an active asynchronous appointment, first open the specific appointment from the ledger.
2. Click the **Take appointment** button.



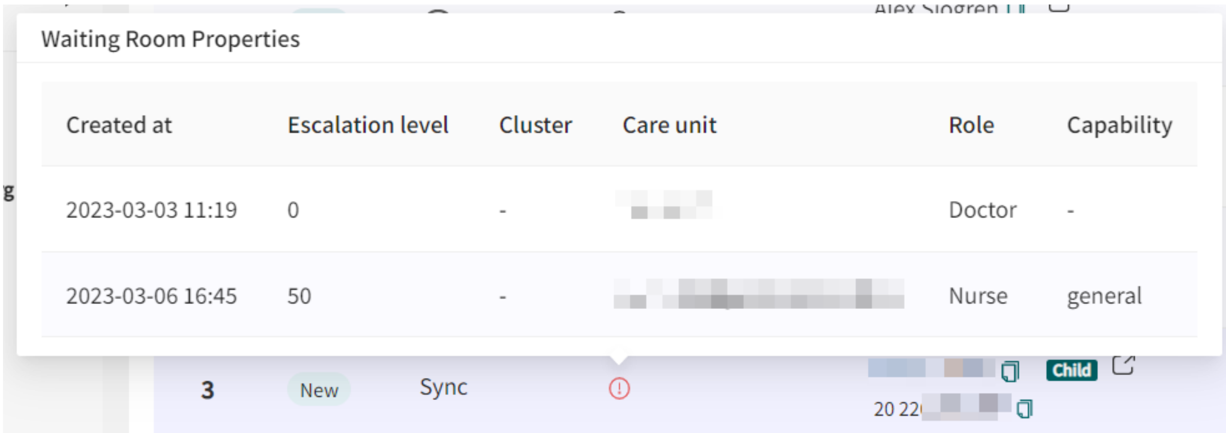
18. Escalated appointments

NOTE
This feature is only enabled for partners who have ordered it.

If the patient is not seen within the timeframe set by the priority given to the appointment, it is escalated by adding more attributes to the appointment. The appointment then becomes visible to more roles and/or care units depending on how the escalation is configured.

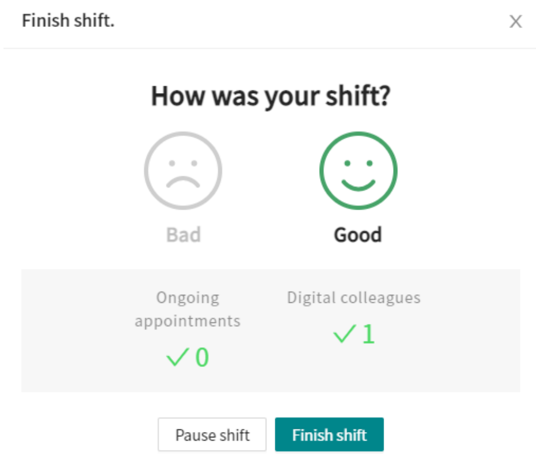
Each time the appointment is escalated, it is given a “higher escalation level”. This increases the likelihood of the patient being received.

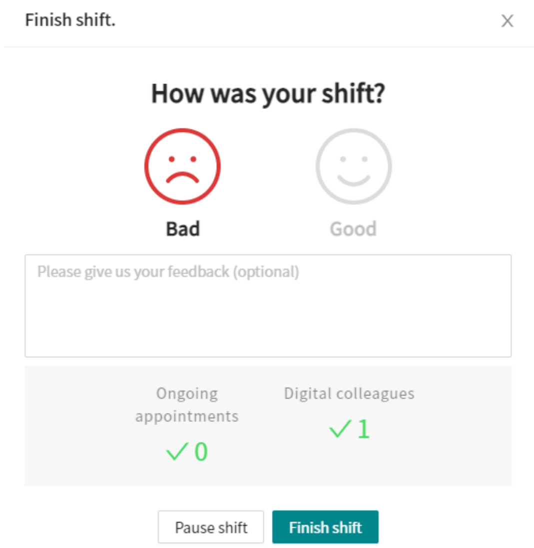
Hover over the "i" icon for an appointment to see the escalation level and other attributes.



19. Ending a shift in Clinic

1. Click **Log out** in the lower left-hand corner.
2. Provide feedback in the feedback field.

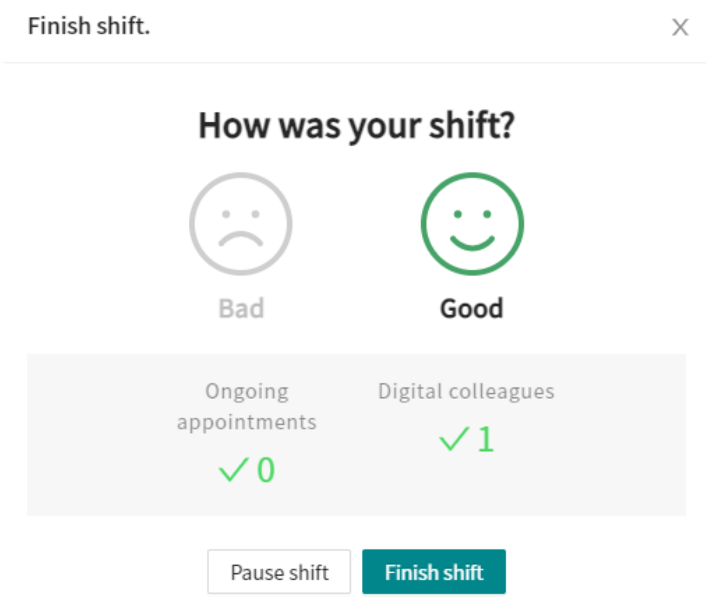




   a. **Satisfied** - default option (smiling face).
   b. **Dissatisfied** – click on dissatisfied (sad face). You can also provide details as to why you are not satisfied.

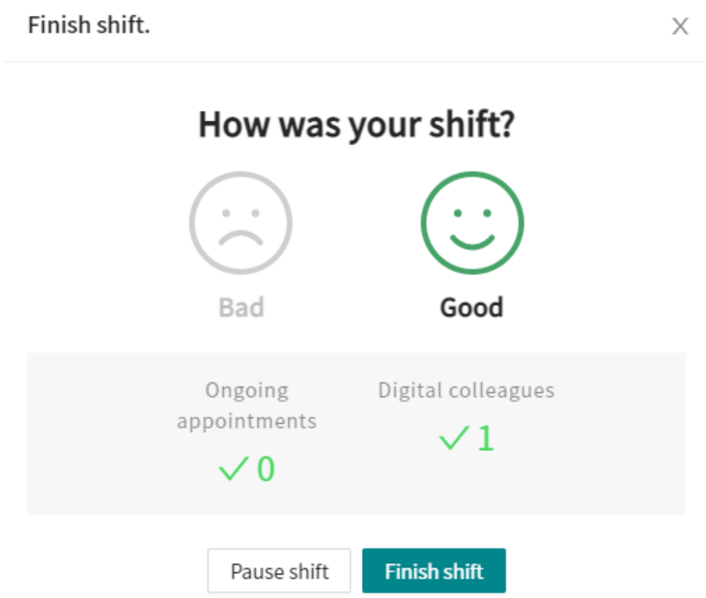
> **NOTE**
> Do not enter any patient details in the feedback field.

3. Read the information and warnings for your shift.



This information includes the number of your pending cases, the number of unsigned notes (if your care unit has enabled this function) and the number of active digital colleagues.

4. Log out from Clinic:



   a. **Pausing a shift**: Enables you to log out, but with an active shift, allowing you to stay visible to colleagues and still receive notifications.
   b. **Ending a shift**: Enables you to completely finish your shift, and no longer be visible to colleagues and unable to receive notifications.

20. Technical issues

20.1. Overview

Technical issues may occur for the healthcare practitioners or the patient. If you are experiencing technical issues, you can, in most cases, understand why they occur by checking the following:

20.2. For practitioners

- Make sure you use Chrome as your browser.
- If there is no sound, and the computer has an F1 key with a sound icon, make sure the F1 button is not enabled.
- Test that the microphone and camera work using the test function in your user profile. For more information, refer to Your profile [61].
- If the sound and video do not work and you have installed a new microphone and camera, contact your IT support.
  - Make sure you have a good connection and that you are connected to the healthcare unit's network. If necessary, make sure your internet is fast enough by testing it at https://bredbandskollen.se.
  - To use Clinic, you must have at least 3Mbits/s or 3G mobile connection. However, the recommended internet speed for best performance is at least 5Mbit/s or 4G mobile connection.

20.2.1. Video

If you cannot manage to get your video up and running, try the following:

- Log out from Clinic and shutting down your computer and restarting it.

If it still does not work, try the following:

- If you cannot see yourself:
  1. Test if your webcam works on your computer, press the Windows button and type the word “camera” (Windows then searches for it).
     a. Click on the Windows built-in camera app that pops up in the start menu.
     b. If you cannot see yourself in the camera app, go to the camera’s privacy settings and make sure “Let apps use my camera” is turned on.
  2. If the video still does not work after taking the above steps, contact your local IT department.
- If you can see yourself:
  1. Check that video is enabled on *Chrome*:
     a. Log into Clinic (in Chrome).
     b. Right-click on the “security” icon (the small padlock icon) to the left of the *URL* field.
     c. Change so that Camera, Microphone, Notifications are always enabled.
     d. Refresh the page to enable changes.
  2. If the video still does not work after taking the above steps, contact your local IT department.

20.2.2. Clear cache (web history)

Cache contains temporary files that your browser saves. By clearing the cache files (= browsing history), certain issues can be solved, such as if you can't log in, you have multiple patients where you can't see any messages, Clinic loads very slowly, nothing happens when you try to click somewhere where normally it works, or if you can't see when you are not booked.

Empty the cache as follows:

1. Click on the three vertical dots to the right of the address bar in *Chrome*.
2. Click “More Tools” and then click “Clear browsing data”.
3. Select the time range “All time”.
4. Make sure all three boxes are selected. Click “Clear Data”.
5. You have now cleared your browsing history on your computer.

20.3. For patients

1. If the video or sound does not work: check the patient has agreed to share a microphone and camera.
2. If the patient uses an iPhone: The patient must have updated to the latest version, at least iOS 11. Information about this is sent to the patient via SMS. The patient must do the following to check the version: Click **Settings**, and then **General** and **About**, and read under **Version**.
3. If the patient uses a computer: Ask the patient if they have a computer with an installed microphone. Ask the patient if they are in the Chrome or Safari web browser. Chrome or Safari is a prerequisite for Clinic to work.
4. Sometimes it can work better if the patient switches from a computer to a smartphone or tablet. The patient then logs in with your web link, and can directly access the online appointment.
5. The patient must have good online connection. If necessary, ask the patient to move to an area with better reception or join a stable Wi-Fi network if 3G/4G is used.
6. If someone calls the patient during the video consultation, the video call will be paused and then continue as soon as the patient has finished the incoming call (so do not end the appointment before it is over).

21. Technical equipment

21.1. Overview

Browser: Always use Chrome as a web browser when you work in Clinic.

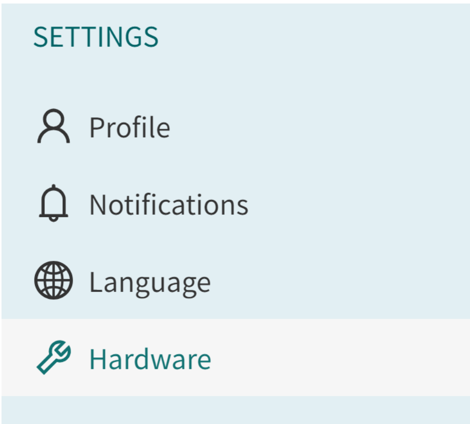
Headset: Refers to an earpiece and microphone, not a mobile phone headset. Check the manual on/off audio function.

Wi-Fi: Feel free to do a broadband test via https://bredbandskollen.se to find out if you have good internet connection. You need >5 MB/s to work in Platform24, and preferably 10 MB/s for optimal quality.

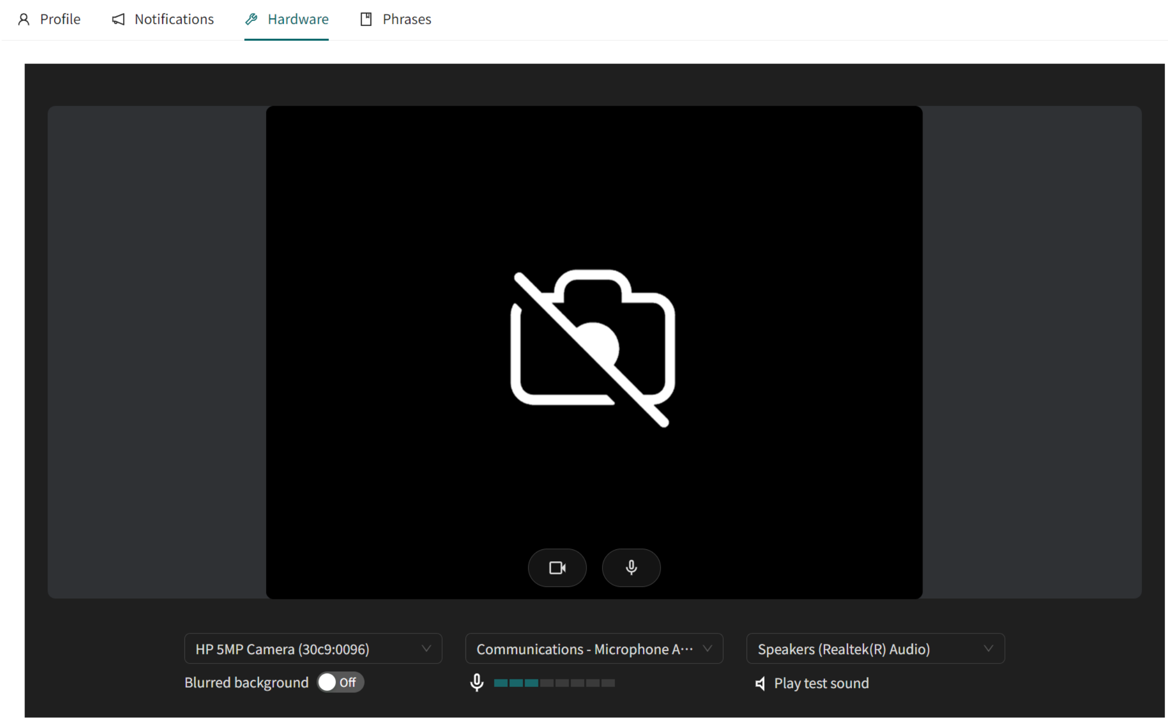
21.2. Hardware

Hardware refers to a microphone and a camera.

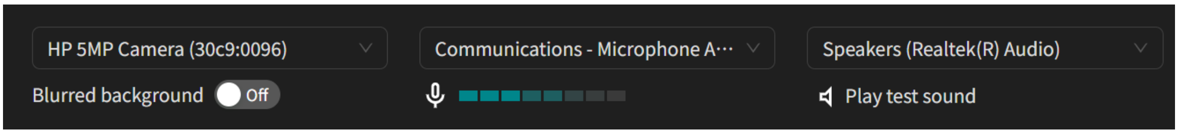
1. Click on your name in the main menu to open your personal settings.
2. Click **Hardware**.



This opens the **Hardware** tab. In the video window you can see if the camera is active and exactly what is displayed. There is also the possibility to disable the camera and sound.



3. Select the camera, microphone and speakers you want to use from the lists (if you have several to choose from).
   You can also select to blur the background, test the microphone and speakers. If the microphone is working as expected, color will be displayed in the sound bar.



21.3. Check that video and audio are enabled on Chrome

1. Log in to Clinic.
2. In *Chrome*, click the padlock icon to the left of the address bar.
3. Change to allow camera, microphone and notifications.
4. Refresh the page for the changes to take effect.

22. Support

22.1. Overview

Contact your care unit's *superuser* with any technical issues or user questions relating to Clinic.

Superusers can answer many questions. If your superuser cannot answer your question, please contact Platform24 via your superuser.

Superusers can contact Platform24 by sending an e-mail to support@platform24.com for non-urgent matters, or by calling +46 (0) 10-410 23 00 for ACUTE matters. This telephone number is for healthcare partners only and must never be disclosed to patients.

Support is available on weekdays between 8 am and 4 pm. Support responds to emails within 4 hours on weekdays.

22.2. Checklist

Checklist when contacting support:

- State name and care unit.
- Contact details - primary phone number.
- Always send in *URL* for patient-related cases.
- Describe your problem in as much detail as possible. Describe what you tried to do to solve it yourself.
- If something technically unexplainable happened, please report as precisely as you can when it happened, for example at 1.28 pm.

⚠ **CAUTION**
Never send patient data by e-mail.

23. Terms and definitions

Chrome	A web browser (such as Internet Explorer and Safari).
Clinic	The healthcare practitioner's platform, where you receive and communicate with the patient.
Customer Success Manager (CSM)	A CSM (Customer Success Manager) is the customer’s main strategic advisor. The CSM is also the customer’s main contact person for any contractual, commercial questions/issues.The CSM is the first point of escalation for any unsolved questions/requests/issues
superuser	A superuser is an end user with increased knowledge and responsibility around the platform at each care 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.
unique personal identifier	For practitioners: can be for example e-mail, HSA-ID For patients: can be for example e-mail, personal identity number, insurance number, BSN
URL	People often talk about URLs in digital contexts. The URL is an address of a web page. Each patient appointment in Clinic has a specific URL. You will see the URL associated with a specific patient appointment in the address bar in the chat module.

24. User Manual versions

#	Date	Description
4.0	2021-11-18	1st released version of Clinic24 manual in Paligo. Transfer and improvements made in both languages from the previous Word based manuals. Versioning starts at 4 for both languages since previous word based version for the Swedish manual was 3.1.
4.1	2022-06-22	Structure change to fit Paligo better - (moved from the other publications), some images updated and some minor text updates. Now using the new banner of front page and also using Common topics for contact, symbols, etc.
5.0	2022-11-01	CE-marking changes after Triage24 MDR certification.
6.0	2023-11-09	Main updates are: • Clinic24 changed to Clinic and Content24 to Content Studio. • Images of the Clinic User Interface (UI) replaced with images containing the new Platform24 logotype. • Updated images and text to reflect UI changes. • Wording in the manual changed to be more general. For example, using the term "unique personal identifier" instead of BankID, not specifying the age that determines a child, etc. • Chapter *2 Symbols* updated with admonitions description. • Non-relevant symbols removed from page 2 and from section *2.1 Symbols*. • The risk level of the four warnings in *Chapter 3. Warnings* has been updated. • Warning removed due to that it is no longer relevant. The warning regarded that a child's social security number is not checked against the population census in the platform. • Updated chapters: *6 Log in and log out*. • Updated sections: *9.3 Attestations*, *9.9 Notifications*, *10.3.4 Medical record notes*, *11.2 Video call*, *12.2. Handing over during an ongoing synchronous appointment*, *17.3. Booking a scheduled visit* and *21.2. Hardware*. • New sections: *10.3.2 Appointment overview*, *10.3.3 Exit care advice*, *10.7 Questionnaires (irregular intervals)* and *17.5. Book an appointment call*. • Removed chapter: *20. Testing the Clinic24 functions*. • The term "unique personal identifier" added to chapter *23 Glossary*.

#	Date	Description
7.0	2024-12-18	Main updates are: • General: Chapter structure and order updated. Images updated to reflect changes in the user interface. • General: Appointment call changed to video appointment. • General: Admonition changed to precaution. • Clarifying note about updates in the User Manual added to an Introduction chapter in a new section called About this manual. Text from Abstract on page 2 was moved to the new section "About this manual". • The support email for User Manuals has been updated in *section 2.3*. • Chapter *3. Definition of symbols and precautions* has been renamed and updated to also contain a definition of the precautions in the User Manuals. It was also clarified in the section titles that this chapter contains definitions. • In section *3.1. Symbols definition*, the previous warning symbol has been replaced with a caution symbol indicating to users to consult the instructions for use for relevant warnings and cautions. • *Chapter 4*: Important precaution about adding a range of several time slots, and a note about withdrawal of a protected identity removed. These are no longer relevant. • Chapter *10. Main menu*, images updated with changes in user interface (e.g., new tabs and new buttons). • Section *10.1. Overview*: image updated to show new menu items and a description of the global resource selector was added. • Section *10.2. Search patient* updated and condensed. • Section *10.5. Attestations* clarified and updated with that it is possible to schedule attestations to be shown in the inbox for the future and that all attestations also are visible in the Patient activity tab. Instructions in section *10.5.4. Creating attestations* updated to explain how to add a scheduled attestation. • New sections: *10.4. Global resource filter*, *10.6. Drop in*, *10.7. Scheduled appointments*, *10.8. Consultations*, *10.9. Billing management*, *10.10. Asynchronous appointments*, *11.7 Health data*. • Section *10.11. Time slots* updated with new images and clarifications. New sections about how to create and manage time slot templates added. Information on how to use tags in time slots added. Expanded information about adding repeated time slots. • User Manuals information updated in section *10.16. Your profile*. • Section *11.3.1. Chat module* updated with clarifications, images and links to relevant sections in the manual. Information about the practitioner chat added. • Information in previous section *10.7. Questionnaires (irregular intervals)* moved to section *11.3.1. Chat module*. • Section *11.3.2. Appointment overview* updated with new buttons to display appointment details and the results from the triage. The description of Flags was made into a separate section *11.3.3* that was updated. • Section *11.3.5. Medical record notes* updated with images and description. Original answers was described in a separate subsection. Clarification added in the *Original answers* section that if the patient

#	Date	Description
		answers a free text question or a file question, the answer will not be part of the triage recommendation logic. • Section *11.4. Patient details* updated with new images and updated text. New Internal notes tab described in section 11.4.5. • Section *11.5.1. Viewing created tickets* updated and clarified. Information added to describe that also questionnaire tickets (standalone questionnaires) and payment tickets can be found in this view. Information added that tickets sent to another care provider will be possible to view. • Section *11.5.2. Creating new tickets* updated with an expanded description of the Create new ticket dialog that also describes the booking window feature. • Section *11.8. All appointments* renamed to "Patient activity". This section also contains new tabs for appointments, attestations, consultations and interviews that are described. • Section *11.12* renamed to "Visits, consultations and tickets". • Chapter *12. Booking an appointment for a patient* updated and where a new section *12.2. Visit types* has been added for clarity. The chapter has also been expanded to describe all visit types in separate sub-sections. • Section *13.1. Change time or cancel appointment* updated to describe that appointments scheduled in external systems should be managed there. • Sections *14.2. Video calls*, *14.3. Sending images or PDF files to patients* and *21.2. Hardware* updated with new images and instructions. • Care provider changed to care unit in some instances in chapter *16. Handing over or transferring appointments*. • Chapter *23. Glossary* renamed to "Terms and definitions" and updated to only show the terms included in the manual. Definition of superuser updated and definition of Customer Success Manager added.