



ENGLISH

platform24

USER MANUAL – SMART CARE PLANS – EPISODIC

CLINIC, SMART CARE PLANS MEDICAL DEVICE VERSION 2

Manual version 4.0
2025-05-09



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



2025-04-01



Platform24 Healthcare AB

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Any serious incidents that have occurred in relation to the medical device should be reported to Platform24 and to the competent authority of the Member State in which the user and/or patient is established.

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1. Introduction

1.1. About Smart Care Plans - Episodic

Smart Care Plans - Episodic is a product offered by Platform24 to automate and connect care activities for planned episodic care.

In Smart Care Plans - Episodic, you can combine different events and activities to optimize your clinical care pathways. Different types of care activities (usually referred to as steps) can be combined in many different ways to accommodate different types of care flows. The care activities can be scheduled relative to each other, and can also be triggered based on the outcome of other activities.

Smart Care Plans - Episodic is a variant of Smart Care Plans that is used for episodic care flows such as for example a surgery process. Smart Care Plans is the overarching name of the product supporting care plans both for episodic and monitoring care flows. This manual describes the episodic care flows, and in the rest of the manual Smart Care Plans is used to reference the product. For more information about monitoring care flows, refer to the Smart Care Plans - Monitoring User Manual.

Currently we have support for the following care activities in a care pathway, but new activities will be added continuously:

- **Digital appointment step**
- **Physical appointment step**
- **Booking ticket step:** Creates a booking ticket that the patient can use to schedule a booking.
- **Questionnaire step:** Creates a questionnaire that the patient can answer.
- **Recommendation step:** Creates a questionnaire that the patient can answer and provides the patient with a recommendation based on the answers.
- **Information step:** Shows information that the patient can read and acknowledge.
- **Attestation step:** Creates an attestation in Clinic.
- **Consent step:** Creates a consent step, where the patient can give consent to one or more consents.
- **Patient email/SMS/push-notification step:** Sends an email, SMS or push notification to the patient.

A care pathway in Platform24 can be activated in two different ways:

1. A practitioner manually enrolls a patient to a care pathway in Clinic.
2. A certain event in an external [EHR](#) system (e.g., booking of an appointment) triggers a care pathway to be activated in Platform24 via integration.



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.

1.2. Hardware and software specifications

- | | |
|----------|--|
| Hardware | <ul style="list-style-type: none">• Computer with SITHS-card reader (only required when practitioner authenticates with SITHS-card) - Sweden only• Computer with Windows OS• 8 GB RAM• Bandwidth > 600 kb/s per stream for calls• Camera (required for video calls)• Microphone (required for video calls)• Speakers or headphones (required for video calls)• Screen resolution 1366x768 or above• Mouse with scroll wheel (required for stationary computers) |
| Software | <ul style="list-style-type: none">• 2 latest versions of Microsoft Edge (Chromium)• Latest version of Chrome |

2. Contact details

2.1. Manufacturer

Address **Platform24 Healthcare AB**
Söder Mälarstrand 57
SE-118 25 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>

2.3.1. Request printed version of the Instructions for Use

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

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

E-mail: <support@platform24.com>

A paper version will be provided at the latest within 7 calendar days of receiving a request from the user, or at the time of delivery of the device if so requested at the time of order.

3. Definition of symbols and precautions

3.1. Symbols definition



CE marking



Consult instructions for use



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



Date of manufacture



Manufacturer



Medical Device



Unique Device Identifier

3.2. Precautions definition

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



WARNING

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



CAUTION

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



IMPORTANT

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

**NOTE**

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

**TIP**

A tip indicates recommendations for the user.

4. Smart Care Plans - Intended use

4.1. Product name

Smart Care Plans

4.2. Intended use

Smart Care Plans is a software used in an outpatient setting where medical parameters are reported by patients asynchronously through external services, connected hardware or manual entry. Smart Care Plans is intended to be used to monitor received medical parameters, or the results of medical questionnaires, compare them to limits of acceptance and inform clinical management through the following functionalities:

1. Alerts to the treating practitioner with varying priority levels.
2. Presentation of configured messages, prompts and requests for action to the patient.
3. Representation of values, or the trends in values, in relation to the limits of acceptance over time using visualizations and written messages.

Smart Care Plans is suitable for any clinical condition that benefits from planned actions based on collection of relevant medical parameters. Its configurability makes it adaptable to a spectrum of clinical conditions.

4.3. Intended user profile

4.3.1. Target client

Healthcare providers

4.3.2. Intended users

- Healthcare practitioners
- Patients
- Medical content developers

Healthcare practitioners

Create and adjust care plans and act on triggered actions.

Details

<u>Type of user</u>	Professional
<u>Age</u>	>20 years old
<u>Level of instructions</u>	<ul style="list-style-type: none"> • Licensed practitioner, e.g., medical doctor, nurse, psychologist • Level C1-C2 in the language supported in the product for the relevant market. • User manual
<u>Interface</u>	Clinic (web)

Patients

Patients input data and act on triggered actions.

Details

<u>Type of user</u>	Layman
<u>Age</u>	<ul style="list-style-type: none"> • System default: 0-120 years • The system allows patients to seek care for themselves from the age they can digitally identify themselves. The exact age is however defined by the healthcare provider. • The system also allows users to seek care for their child up to the age of 18 years old.
<u>Level of instructions</u>	<ul style="list-style-type: none"> • Level <i>B1-B2</i> in the language supported in the product for the relevant market.
<u>Interface</u>	Patient (app/web)

Medical content developers

Create templates for care plans.

Details

<u>Type of user</u>	Professional
<u>Age</u>	>20 years old
<u>Level of instructions</u>	<ul style="list-style-type: none"> • Undergone education and training • Level <i>C1-C2</i> in the language supported in the product for the relevant market. • User manual
<u>Interface</u>	Manage (web)

4.4. Intended operational environment

Smart Care Plans is intended to be used by healthcare providers and healthcare systems in countries where the population has access to the internet through smartphones or computers.

4.5. Intended target conditions

Smart Care Plans is intended to be used for well-known and predictable health conditions, investigations, or care episodes where a smart digital care plan is feasible and would be of benefit for the patient without requiring any continuous health data streams.

4.6. Intended patient population

Smart Care Plans shall be used by the patients as determined by their treating practitioners, in order to provide accurate medical information to inform clinical management. The target treatment group includes patients in the need of a smart digital care plan for instance to monitor their chronic disease or handle an elective care episode.

4.7. Intended clinical benefits

The clinical benefit of Smart Care Plans lies in more effective patient management. This is done by increasing the relevance of the information presented to practitioners by utilizing rule-based actions, which enables clinicians to focus more on patients in need of their attention, and possibly also managing more patients, without reducing safety. Due to the rule-based actions, decisions and/or actions on the reported medical parameters are also virtually immediate, meaning that patients will get an assessment on their medical parameters faster.

Other indirect clinical benefits include giving patients accurate and timely feedback on their reported medical parameters, by allowing practitioners to automate rule-based communication with the

patient and present this in a user-friendly way. Another benefit lies in the possibility of Smart Care Plans to adapt to the patient's current health, which increases both relevance and safety to the individual patients, as well as relevance to practitioners.

The Smart Care Plans product has the following claims:

- The use of smart events increases the relevance of the information presented to the practitioners
- The use of smart events enables the practitioners to handle more patients
- Smart Care Plans enables relevant and individualized care plans
- The use of Smart Care Plans does not entail any increased risk compared to standard remote patient monitoring care

4.8. Performance characteristics

By allowing individualized thresholds and actions for medical parameters, Smart Care Plans minimizes unnecessary attestations by making sure that practitioners only receive clinically relevant information, enhancing patient management efficiency.

4.9. Contraindications

Certain patients shall not use the product:

1. Patients with life-threatening symptoms that require immediate medical attention, i.e., are expected to need acute hospitalization within 24 hours. In cases where these symptoms are discovered during the use of Smart Care Plans, the use of the device should stop.
2. Patients who are not well-informed about their health condition, including but not limited to, recognizing signs of deterioration of their health condition and knowing when, where and how to seek emergency care if needed.
3. Patients with severe cognitive issues (including but not limited to dementia or severe intellectual disability).
4. Patients for which access to the required medical data for use of a smart digital care plan is restricted.
5. Smart Care Plans is not intended to provide information which is used to take decisions with diagnosis or therapeutic purposes where such decisions have an impact that may cause death, irreversible deterioration of a person's state of health, serious deterioration of a person's state of health or a surgical intervention.

4.10. Residual risks

Despite the implementation of risk control measures, certain residual risks remain and cannot be completely eliminated:

- Incorrect treatment decisions may occur due to incorrect or misleading information.
- Delayed or absent treatment may result from reliance on connectivity and availability of the software.
- Inaccurate user input may lead to incorrect or misleading output that in turn can lead to impacts on performance and clinical benefit.
- Software errors may cause unexpected behavior that could impact performance and clinical benefit.
- Even though due care has been taken to validate all care plan templates, configuration of care plan templates can result in unsuitable care plans based on the patient's ability and condition.
- User errors, including misinterpretation of the interface, may affect proper use and affect clinical benefit.

Users shall follow the instructions carefully and apply clinical judgment when interpreting results.

4.11. Foreseeable misuse

Certain behaviors are technically possible by the product but outside of the intended use:

1. Smart Care Plans is not intended to be used to automate decisions on critically ill patients.
2. Smart Care Plans is not intended for monitoring of patients in an inpatient setting.
3. Smart Care Plans is not intended to be used to replace any process which is intended to reduce the risk of suicide or self harm for a patient. It is however within the intended use of the product to enhance the work to reduce the risk of suicide or self harm for a patient.
4. Smart Care Plans is not intended for continuous synchronous monitoring.
5. Smart Care Plans is not intended for independently determining patient management in a closed loop system, without the involvement of a practitioner.
6. Smart Care Plans shall not be initiated via an integration from an external system if the care plan can cause harm if applied to the wrong patient.

5. Log in and log out

5.1. 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.

5.2. Log out of Clinic

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

6. The Care pathways view

To reach the **Care pathways** view, click on **Care pathways** in the main menu.

Care pathways

Open troubleshooting details

Search patient

Start page
Attestations
Scheduled appointments
Care pathways
Timeslots
Digital colleagues (1)

MS Malin Surname
Doctor, Pathways Care Unit
Notifications

FS Florin Surname
Male, 34 years
Acne

Collapse menu
Log out

Care pathways

Total Patients: 9
Assigned to you: 0

Enroll patient

Care pathways: Select a pathway
Identification number: Search
Assigned practitioner: Select a practitioner
Show inactive care pathways: ☐

Patient	Care pathway	Date enrolled	Current phase	Next appointment	Date	Assigned practitioners
Nicolas Surname 19 XXXXXX-XXXX	Pathway with everything	6 September 2024 at 15:52				
Mateusz Surname 19 XXXXXX-XXXX	EVLT-treatment	9 July 2024 at 07:42		EVLT treatment	7 July 2025 at 09:00	JD
Nicolas Surname 19 XXXXXX-XXXX	Pathway with everything	7 May 2024 at 08:46				
Mateusz Surname 19 XXXXXX-XXXX	EVLT-treatment	15 April 2024 at 15:17		EVLT treatment	18 December 2024 at 08:00	JD
Mateusz Surname 19 XXXXXX-XXXX	EVLT-treatment	15 April 2024 at 15:11		EVLT treatment	18 December 2024 at 08:00	AS JD #1

The **Care pathways** view consists of the following parts:

Statistics

The statistics contain information on how many patients are enrolled in a care pathway on the current care unit (**Total Patients**) and how many patients in active care pathways are **Assigned to you**.

Enroll patient

The **Enroll patient** button allows you to manually enroll a patient in a care pathway. For more information, see [Enroll patient in a care pathway \[19\]](#). In order to enroll a patient to a care pathway, the patient must first be registered in the Clinic application. For information on how to add a new patient in Clinic, refer to the *Clinic User Manual*.



NOTE

If you have a booking integration where care pathways will be created automatically in Platform24 via the integration, you will not use this functionality.

Patient list

The patient list contains the patients enrolled in a care pathway on the specific care unit. For more information about the patient list, see [Patient list \[16\]](#).

6.1. Patient list

The patient list in the care pathways view contains all patients enrolled in a care pathway on the specific care unit.

Care pathways		Identification number	Assigned practitioner			
Select a pathway		Search	Select a practitioner			
			Show inactive care pathways			
Patient	Care pathway	Date enrolled	Current phase	Next appointment	Date	Assigned practitioners
Andrii 19 99	Yearly follow up diabetes type 2	24 September 2024 at 16:54		Surgery Pathway appointment	29 September 2024 at 11:00	
Andrii 19 99	Yearly follow up diabetes type 2	24 September 2024 at 11:38		Blood sampling appointment	27 September 2024 at 11:00	
Johaness 19 96	Gallbladder removal surgery	24 September 2024 at 11:22	Pre-surgery	Surgery Pathway appointment	25 September 2024 at 11:00	

The patient list contains the following information/columns:

- Patient**
- Name and *unique personal identifier*.
- Status**
- Status of the care pathway. Can be “Active”, “Completed” or “Canceled”.



NOTE
This column is only shown if the **Show inactive care pathways** slider has been enabled.

- Care pathway**
- The name of the care pathway the patient is enrolled in.
- Date enrolled**
- The date when the patient was enrolled in the care pathway.
- Current phase**
- The phase in the care pathway in which the patient currently is.



NOTE
Some care pathways do not have the concept of “phases”. In that case this column will be empty.

- Next appointment**
- The next upcoming appointment in the care pathway.
- Date**
- The date of the next upcoming appointment in the care pathway.
- Assigned practitioners**
- The responsible practitioner(s) for the specific patient’s care pathway. Mainly used for filtering on the care pathways that a specific practitioner is responsible for, and to trigger attestations from the care pathway to the assigned practitioner.

The patient list is by default sorted by **Date enrolled** (when the patient was enrolled in a care pathway).

Click on a patient name to view the patient profile where you can see detailed patient data. For more information about the patient profile, see [Patient profile \[22\]](#). If you want to go to the [Detailed care pathway view \[25\]](#), click on the care pathway row in the table.

If you want only to see the patients enrolled in a specific care pathway, you can do this by selecting a care pathway in the drop-down list.

It is also possible to search for a patient in the list by using the unique personal identifier. In addition, it is possible to see all patients that a specific practitioner is responsible for by selecting the practitioner in the drop-down list.

The **Care pathways** view by default only shows active care pathways, but if you also want to see the inactive care pathways (i.e., the completed or canceled ones), enable the **Show inactive care pathways** slider.

Care pathways		Identification number	Assigned practitioner		Show inactive care pathways <input checked="" type="checkbox"/>		
Select a pathway		Search	Select a practitioner				
Patient	Status	Care pathway	Date enrolled	Current phase	Next appointment	Date	Assigned practitioners
Gustaf 19 99	Completed	Gallbladder removal surgery	25 September 2024 at 10:10				
Gustaf 19 99	Completed	Gallbladder removal surgery	25 September 2024 at 09:48				
Gustaf 19 99	Cancelled	Gallbladder removal surgery	25 September 2024 at 09:44				

7. Enroll patient in a care pathway



NOTE

This specific functionality will not be used if the customer has an integration where care pathways will be triggered automatically.

1. Go to the **Care pathways** view (or the **detailed care pathways view** in a patient profile).
2. Click the **Enroll patient** button.
3. Enter the unique personal identifier of the patient you want to add and press Enter on the keyboard or click on the search symbol next to the input field. The selected patient's details will then be displayed.

* Patient

Oskar Surname (19 XXXXXX-XXXX)

Selected patient:



Oskar Surname

19XXXXXX-XXXX



NOTE

If the patient is not already registered in Clinic, you need to register the patient in Clinic before you can add them to the care pathway. For information on how to add a new patient in Clinic, refer to the *Clinic User Manual*. Once the patient is registered, repeat the first steps in this instruction.

4. Select the responsible practitioners in the drop-down list (you can select multiple options) and click **Next**.

5. Select which care pathway you want to enroll the patient in from the drop-down list. You will be able to select from the care pathway templates configured in your partner.

Care pathway

* Pathway

p

copd

Knee prosthesis surgery

Pregnancy

6. After selecting a care pathway you will see a simplified overview of the different steps in that particular care pathway template. Click **Next** to proceed.

* Pathway

Test eyelid surgery

Preview of pathway "Test eyelid surgery"

	Phase	Order	Pathway step
○	Pre surgery	1	Questionnaire: Pre-op screening questionnaire
○	Surgery	2	Appointment: Surgery appointment
○	Post surgery	3	Questionnaire: Post-op questionnaire



NOTE

If the patient is already enrolled in the same care pathway template you will get a warning about this.



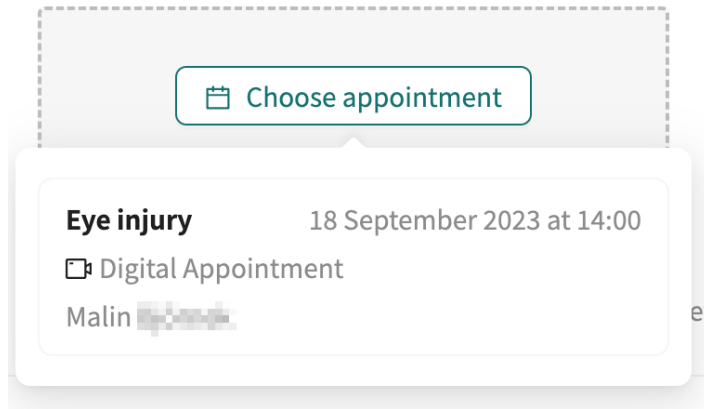
The patient is already enrolled into a similar pathway:

Test eyelid surgery

Enrolled on 4 September 2023 at 16:28

- If the care pathway contains a booking step (external appointment) or an appointment step (appointment in Clinic), you will be asked to choose among the patient's upcoming appointments and connect the right appointment to the right step in the care pathway.

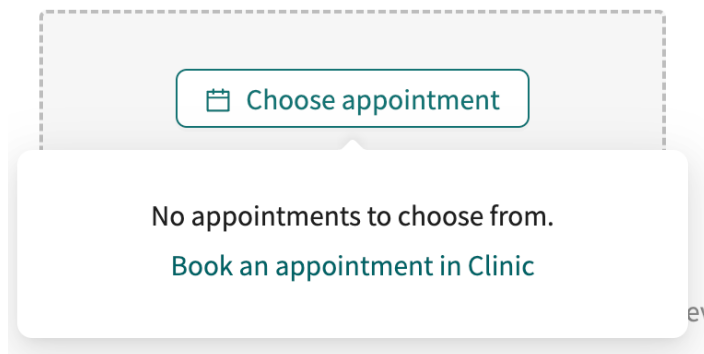
*** Appointment: Surgery appointment**



NOTE

If the patient has no upcoming appointments or bookings, the practitioner will be informed about this.

*** Appointment: Surgery appointment**



- After connecting the appointments you will again see the simplified preview of the care pathway, now with the starting dates for each step in the care pathway. Click **Next** to proceed.

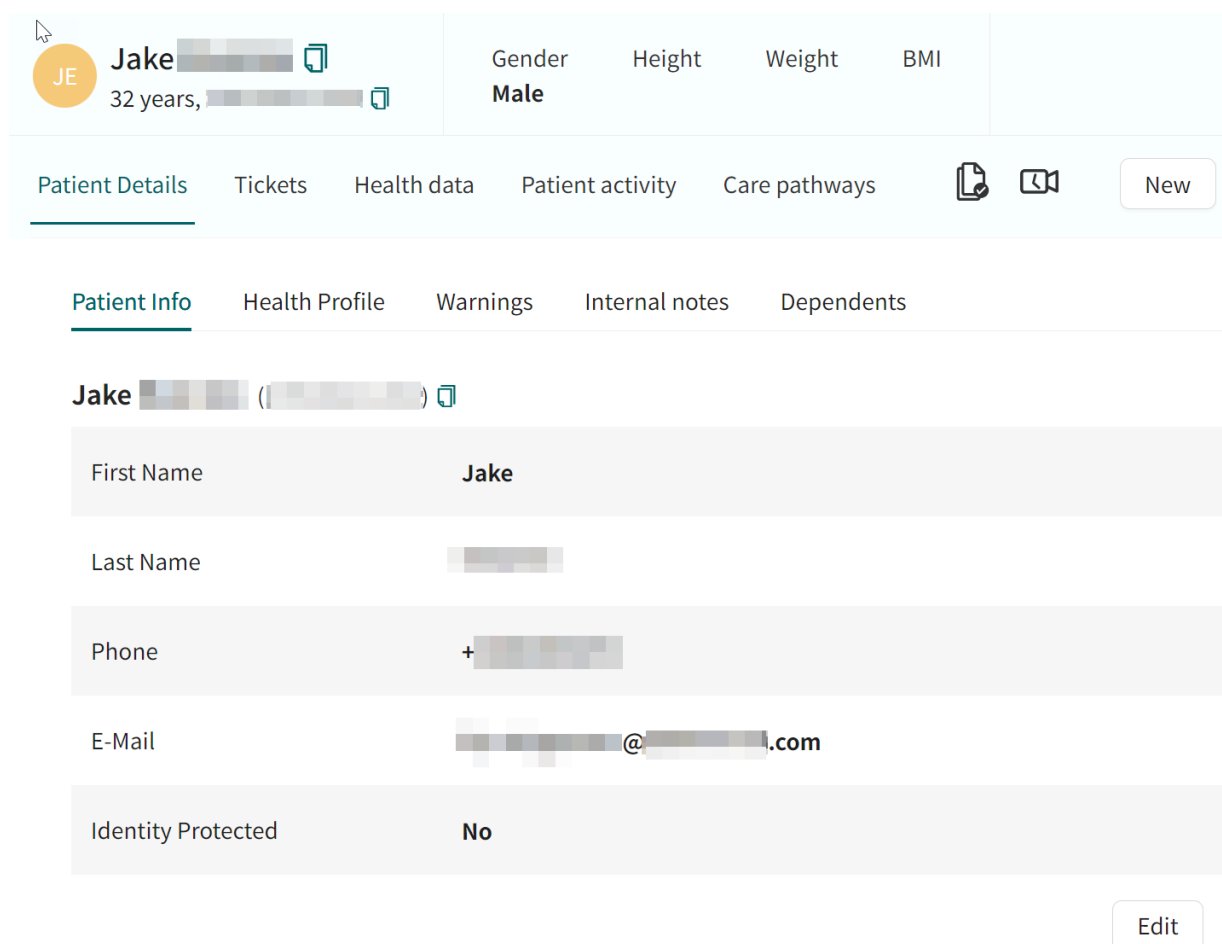
Preview of pathway "Test eyelid surgery"

	Phase	Order	Pathway step	Starting date
○	Pre surgery	1	Questionnaire: Pre-op screening questionnaire	4 September 2023 at 17:30
○	Surgery	2	Appointment: Surgery appointment	4 September 2023 at 19:45

- In the summary view you will see a summary of the patient details, the assigned practitioners and the selected care pathway.
- Review the summary and click **Enroll patient** to enroll the patient to this care pathway.



8. Patient profile

To access a patient profile in a care pathway, click on a patient in the **Care pathways** view. You can also search for the patient in the main menu on the left (**Search patient**).




The screenshot shows the Patient profile page for a patient named Jake. At the top, there is a header bar with a patient card on the left and a table of vitals on the right. The patient card includes a profile picture (a yellow circle with 'JE'), the name 'Jake', and '32 years, [redacted]'. The vitals table has columns for Gender (Male), Height, Weight, and BMI. Below the header bar is a navigation menu with tabs: Patient Details (selected), Tickets, Health data, Patient activity, Care pathways, and a 'New' button. Under the 'Patient Details' tab, there are sub-tabs: Patient Info (selected), Health Profile, Warnings, Internal notes, and Dependents. The main content area displays the patient's information in a form-like layout: First Name (Jake), Last Name ([redacted]), Phone (+[redacted]), E-Mail ([redacted]@[redacted].com), and Identity Protected (No). An 'Edit' button is located at the bottom right of the form.

Gender	Height	Weight	BMI
Male			

Patient Details Tickets Health data Patient activity Care pathways   New

Patient Info Health Profile Warnings Internal notes Dependents

Jake ([redacted]) 

First Name **Jake**

Last Name [redacted]

Phone + [redacted]

E-Mail [redacted]@[redacted].com

Identity Protected **No**

Edit

The top level tabs in the patient profile are as follows:

1. **Patient Details**

Contains the patient's details such as patient information (including e-mail, phone number etc.), health profile, warnings, internal notes and dependents (children connected to this patient).

2. **Tickets**

Contains booking tickets and standalone questionnaires (questionnaire tickets) sent to patients. You can also see the status of each ticket. If a patient has used the ticket and set up an appointment, the status of that appointment can also be viewed.



NOTE

Here tickets and questionnaires sent to the patient in a care pathway will also be found.

3. Health data

Visualizes specific health data collected in questionnaires in the form of graphs. For more information, see [Graphs \[33\]](#).



NOTE

Health data that should be visualized as graphs must be configured in the questionnaires.

4. Patient activity

Shows planned and most previous activities and related to the patient, appointments, attestations, consultations and interviews, from care units within the same care provider. Activities from other care providers within the same partner are only visible if the patient has given their consent.

PS

Peter Surname

34 years, 199008NN-NNNN

Gender

Male

Height

Weight

BMI

Patient Details

Tickets

Health data

Patient activity

Care pathways

New

Appointments

Attestations

Consultations

Interviews

Date	Type	Title	Status	Practitioner
Dec 16, 2024	Appointment	Acne problems	Closed	Name Surname Care unit
Oct 1, 2024	Appointment	Acne problems	Closed	Name Surname Care unit
Jul 2, 2024	Appointment	Allergy	Cancelled	Name Surname Care unit

5. Care pathways

Shows all care pathways the patient currently is enrolled in (active care pathways) or has been enrolled in (inactive care pathways) within the current care provider. If the patient has given consent, it will also show pathways belonging to other care providers within the same partner. On each pathway-card you will be able to see some high-level information about the pathway: name, description, status, estimated progress, enrollment date and responsible care unit.

To view more information about a specific care pathway, click on **View details** in the care pathway card. See [Detailed care pathway view \[25\]](#) for more information.

GL

Gustaf

25 years, 1999

Gender

Male

Height

180 cm

Weight

80 kg

BMI

24.69

Patient Details

Tickets

Patient Surveys

Health data

Patient activity

Care pathways

New

Care pathways

+ Enroll patient to care pathway

+ Enroll patient to care pathway (BETA)

Active pathways

Gall bladder removal surgery

Active

Estimated progress: 92%

Enrolled since: 25 September 2024 at 13:16

Care unit: english-demo-CU

[View details](#)

9. Detailed care pathway view

In the detailed care pathway view you can view more information about the care pathway. Here you can view where in a pathway the patient is, and the finished and planned steps for the patient.

92%

Estimated progress

Gall bladder removal operation

Active

Open troubleshooting details

Time travel

Cancel pathway

About

Enrolled since: 25 September 2024 at 13:16
Care unit: english-demo-CU
Number of phases: 3
Current phase: Before surgery

Assigned practitioners

This care pathway does not have any assigned practitioner.

+ Assign practitioners

Information articles

[About the surgery](#)

Planned steps

Show potential attestations

Show notifications

View as tables

View in flowchart (BETA)

Activation date	Status	Type	Title	End date
25 September 2024 at 14:20	Active	Attestation	Expired pre-surgery questionnaire	30 September 2024 at 14:20

Completed steps

Date	Status	Type	Title
25 September 2024 at 14:20	Expired	Questionnaire	Pre-surgery questionnaire
25 September 2024 at 14:05	Completed	Patient email	Reminder questionnaire

9.1. General information

On the top of the detailed care pathway view you can see:

- Name of the pathway
- Status (Active, Canceled, Completed)
- Description of the pathway (if existing)
- Estimated progress



NOTE

This is an estimation based on the planned remaining steps.

Care pathways / Gallbladder removal surgery

0%

Estimated progress

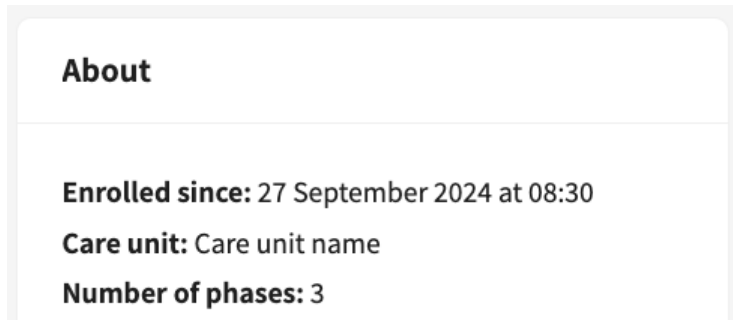
Gallbladder removal surgery

Active

9.2. About

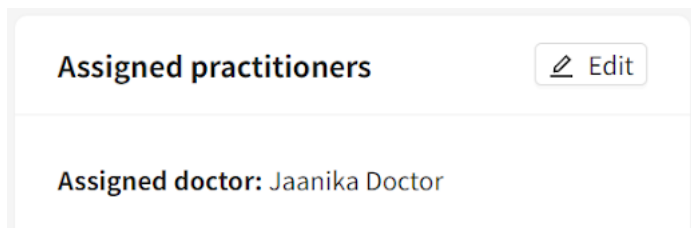
In the **About** section general information about the pathway can be found:

- Enrollment date
- Care unit
- Number of phases (if applicable)
- Current phase (if applicable)



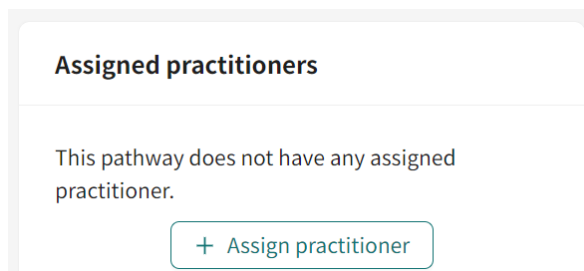
9.3. Assigned practitioners

In the **Assigned practitioners** section you can see what practitioners are assigned to the pathway.

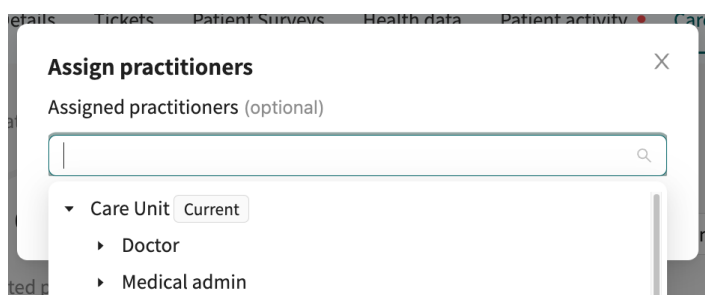


9.3.1. Add assigned practitioners

1. Click the **Assign practitioner** button in the **Assigned practitioners** section.

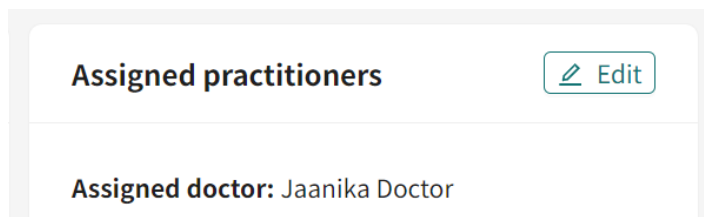


2. In the dialog that opens, you can search for practitioners to add to the pathway.

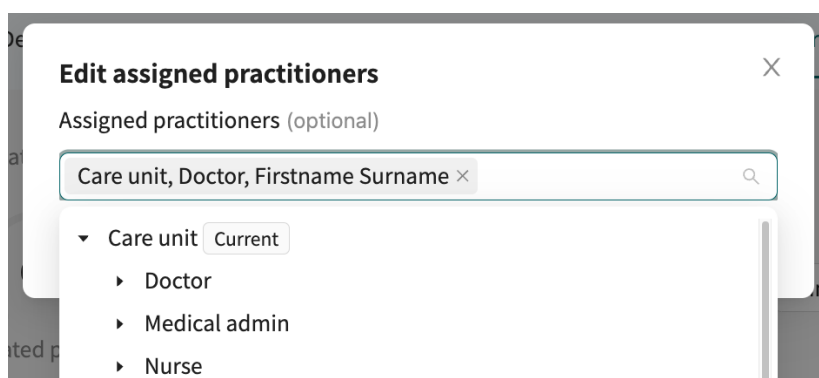


9.3.2. Edit assigned practitioners

1. Click the **Edit** buttons in the **Assigned practitioners** section.



2. In the dialog that opens, you can search for additional practitioners to add to the pathway, or remove current assigned practitioners.



9.4. Information articles

In the **Information articles** section you can see all information articles that are connected to the pathway.



If you click on a link, you can open and read the article.

Article: "Information about varicose veins" ×

What are varicose veins?

Varicose veins are dilated veins that occur mainly in the legs and are caused by leaking valves in the veins. The main reasons for treating varicose veins are to relieve symptoms, such as painful or tired legs, prevent complications and cosmetic desires.

Different types of varicose veins

+

How do you get varicose veins?

+

What symptoms do varicose veins cause?

+

What are the treatments for varicose veins?

+

Close




NOTE


If you want to edit an information article, this is done in the Manage application. For instructions, see the *Smart Care Plans Studio User Manual*.

9.5. Cancel a care pathway

In order to cancel a care pathway, click on the **Cancel pathway** button in the top right corner in the detailed care pathway view.

 Cancel pathway

When a care pathway has been canceled for a patient, the patient will still be able to see the care pathway in the Patient app, but it will be marked as canceled.




Cancel pathway

When cancelling a pathway all of its remaining steps (appointments, booking tickets, questionnaires etc.) are also cancelled.

Please note that **appointments created in external systems** are not automatically cancelled.

Close

Cancel pathway







NOTE

Canceling a care pathway will also cancel its remaining steps. However, appointments booked in external EHR-systems will *not* automatically be canceled. These appointments have to be canceled in the EHR-system.

9.6. Planned steps

In the **Planned steps** list you can see all upcoming and active steps in the pathway.

Planned steps		Show potential attestations 		Show notifications 		View as tables	View in flowchart (BETA)
Activation date	Status	Type	Title			End date	
27 September 2024 at 08:26	<div> Active</div>	Information	Reminder: stop smoking			3 October 2024 at 11:00	
27 September 2024 at 08:26	<div> Active</div>	Attestation	Book meeting with anesthesiologist			2 October 2024 at 08:26	

The list of planned steps contains the following information:

- Activation date

The date when the step becomes active. If the activation date cannot be calculated yet, this column will be empty.
- Status

A planned step can have the following statuses:
Potential: The step might happen.
Scheduled: The step is scheduled and will become active on the activation date.
Active: The step is active and can be interacted with.
Pending booking: The step is blocked due to being dependent on a booking/appointment step that is lacking a date.
- Type

Type of step, for example questionnaire, online appointment or attestation.
- Title

Name of the step (as specified in the pathway template). For steps that are possible to open in another view in Clinic, the title will be clickable. For example, if you click on an upcoming digital appointment you will be redirected

to the appointment view, and an active attestation will redirect you to the attestation view.

Expiration date The date when the step will expire.

The list of planned steps is sorted in chronological order by the activation date, and by default potential attestations and patient notifications (SMS, emails) are *not* shown. If you want to see these - enable the **Show potential attestations** or **Show notifications** slider and they will appear in the list.

9.7. Completed steps

In the **Completed steps** list you can see all finished steps in the pathway.

Completed steps			
Date	Status	Type	Title
27 September 2024 at 08:28	✔ Completed	Appointment	<u>Meeting with anesthesiologist</u>
27 September 2024 at 08:27	✔ Completed	Booking ticket	<u>Book meeting with anesthesiologist</u>
27 September 2024 at 08:26	✔ Completed	Questionnaire	<u>Pre-op questionnaire</u>

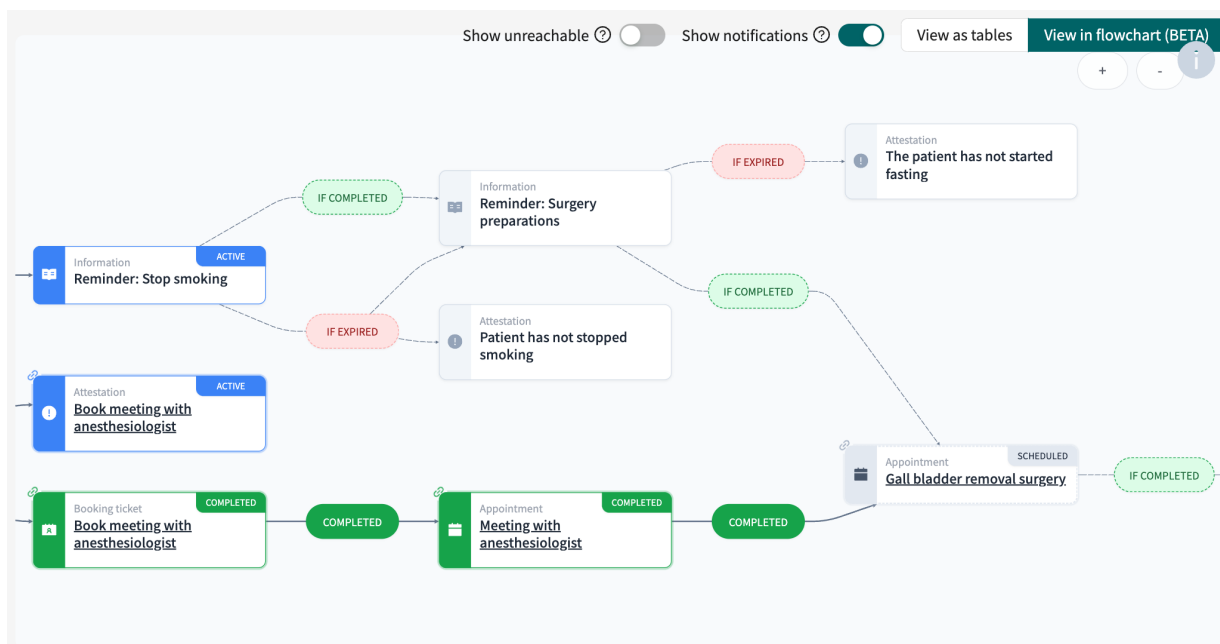
The list of completed steps contains the following information:

- Date** The date when the step transitioned to its final state, i.e., if completed it will show the date the step was completed, and if expired it will show the date the step expired.
- Status** A completed step can have the following statuses:
Completed: The step is completed.
Canceled: The step is canceled.
Expired: The step was not completed before the expiration date.
- Type** Same as for planned steps.
- Title** Same as for planned steps. Note that in completed steps you will also be able to click the title to go to the completed questionnaires.

The list of finished steps is sorted in chronological order by the date it was updated, and by default patient notifications (SMS, emails) are *not* shown. If you want to see these - enable the **Show notifications** slider and they will appear in the list.

9.8. View as flowchart

It is possible to view the pathway steps (both planned and finished) as a flowchart instead of a listview, by clicking the **View in flowchart** button.



The patient notifications will be hidden by default, and can be shown by enabling the **Show notifications** slider. As the pathway moves on, some steps might be “unreachable”, e.g., if a reminder should be sent out only if a questionnaire is not completed, the reminder will become an unreachable step when the questionnaire is completed. The unreachable steps are hidden by default in the flowchart but can be shown by enabling the **Show unreachable** slider.

10. View information connected to a care pathway

10.1. View questionnaires

There are different places where you can view questionnaire statuses and results, see following sections.

10.1.1. Status

To check the status of a questionnaire, go to **Patient profile > Tickets > Questionnaire tickets**. Here you can see when the questionnaire was activated, when it expires, its status, and if completed the completion date (**Used at**). You can also cancel questionnaire tickets before they have been used or expired by clicking on the bin/delete symbol to the right in the row.

Booking tickets		Questionnaire tickets		Payment tickets	
Reason for questionnaire	Valid from	Expires At	Used at	Status	Created By
+ Pre-op questionnaire	2024-09-27	2024-10-04	-	ACTIVE	-

10.1.2. Questionnaire answers

To check the patient's answers to a specific questionnaire, go to **Patient profile > Patient activity > Interviews** and choose the questionnaire you want to see the answers to.

Appointments		Attestations 		Consultations		<u>Interviews</u>			
Date		Title		Type		Status		Practitioner	
Nov 14, 2023		Breathing problems		Interview		Finished		- Care unit	
Jun 14, 2023		Acne problems		Interview		Finished		- Care unit	

When clicking on a questionnaire, the questionnaire details view is shown:

[Patient Details](#) [Tickets](#) [Patient Surveys](#) [Health data](#) [Patient activity](#) [Care pathways](#)

INTERVIEW, CARE UNIT
breathing problems
Started at 11/14/2023 3:26 PM
[Triage recommendation](#)

[Allergies](#) [Diagnosis](#) [Medication](#) [Surgery](#)

[Original Text](#) [Original answers](#)

breathing problems

breathing problems

How long have you had breathing problems?
[Less than a week](#)

The **Original Text** is the SmartText, that is, the auto-generated summary of the patient's answer. The **Original answers** are the patient's exact answer to each question in the questionnaire.

If the patient uploaded photos in the questionnaire, they will also be displayed here under a tab called **Uploads**.

10.1.3. Graphs

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.

MN

Milo

33 years, 1991

Patient Details

Tickets

Health data

Patient activity

Care pathways

New

Health data

Enrolled in 1 remote monitoring plan

Enroll to remote monitoring plan

Add activities

Conclude activities

Blood pressure

Active

Latest: Last Wednesday at 10:56 AM

123/45 mmHg

Low below target

Pulse

Active

Latest: Last Wednesday at 10:56 AM

80 /min

Within target

10.2. Appointments and bookings connected to a care pathway

To see all digital and physical appointments (bookings) connected to a care pathway, go to **Patient profile > Patient activity > Appointments**. Here you can see the patient's all previous and planned appointments.

PS

Peter Surname

34 years, 199008NN-NNNN

Gender

Height

Weight

BMI

Male

Patient Details

Tickets

Health data

Patient activity

Care pathways

New

Appointments

Attestations

Consultations

Interviews

Date	Type	Title	Status	Practitioner
Dec 16, 2024	Appointment	Acne problems	Closed	Name Surname Care unit
Oct 1, 2024	Appointment	Acne problems	Closed	Name Surname Care unit
Jul 2, 2024	Appointment	Allergy	Cancelled	Name Surname Care unit

If you click on an appointment in the **Appointments** list, you will open the detailed appointment view.

The screenshot displays the 'Detailed appointment view' for a patient named Jake. The top navigation bar includes tabs for 'Current appointment', 'Patient Details', 'Tickets', 'Health data', 'Patient activity', and 'Care pathways'. The patient's profile shows 'Jake', 32 years old, Male, with fields for Height, Weight, and BMI. The appointment is titled 'Acne problems' and is scheduled for 01/04/2024 at 9:35 AM. A 'Consult' button is visible. Below the appointment details, there are sections for 'Origin' (Clinics), 'Triage' (Results), 'Priority' (3), and 'Appointment Details' (Show). There are also fields for 'Allergies', 'Diagnosis', 'Medication', and 'Surgery'. A 'Notes' section shows 'Original Text' and 'Original answers'. A message states: 'This appointment does not have any patient interviews associated with it'. At the bottom, there is a chat area with a 'Not ready' button and options for 'SMS' and 'PHRASES'. A text input field says 'Type your message here...' and a button says 'Start message with [icon] to search for phrase'.



NOTE

For physical appointments (i.e., appointments taking place outside of the Clinic application) you will not be able to open a detailed view.

10.3. Booking tickets connected to a care pathway

To check the status of a booking ticket connected to a care pathway, go to **Patient profile > Tickets > Booking tickets**. Here you can see when the booking ticket was activated, when it expires, its status, and if completed the completion date (**Used at**). You can also cancel booking tickets before they have been used or expired by clicking on the bin/delete symbol to the right in the row.

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	-	

10.4. Attestations created in a care pathway

Attestations are tasks created automatically by the care pathway, and these are pre-configured by your organization. For example, an attestation can be sent when a patient has or has not answered a questionnaire, or if a patient does not use their booking ticket.

Attestations can also be pre-configured to have different priorities, in order to guide the practitioners what attestation to handle first. For example, attestations with different priorities can be sent based on what the patient answered in a questionnaire.

The attestations created by a pathway can be configured to be assigned to a role or to a specific practitioner.

10.4.1. 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 attested** slider to also show the already attested attestations.

Attestations

[+ Create new attestation](#)

Incoming

Created by me

Attested by me

Assigned to me

Whose attestations do you want to see?

New triage UI ×

Filter by type

Select one or more types

Show also attested





Patient	Prio	Content	Assignees	Role	Created at
Loise 19 83	3	Activity missed (33)		Doctor	Jul 7, 2023 - Aug 8, 2023
My Child 20 18	3	Activity missed (32)	TN	Nurse	Jul 4, 2022 - Aug 4, 2022

10.4.2. Attestations attested by me

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

Attestations

 Create new attestation

Incoming		Created by me		Attested by me	Assigned to me	
Patient	Prio	Content		Created at	Attested at	
Jonattan 19 50 	1	Appointment cancelled (1)		Mar 23, 2023	Sep 16, 2024	
Peter 19 82 	3	Appointment follow-up (1)		Mar 4, 2024	Mar 4, 2024	

11. Terms and definitions

B1-B2	B1-B2 in the Common European Framework of Reference (CEFR) self-assessment scale. e.g. Independent user of the language.
C1-C2	C1-C2 in the Common European Framework of Reference (CEFR) self-assessment scale. e.g. Proficient user of the language.
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
EHR	Electronic Health Record
superuser	<p>A superuser is an end user with increased knowledge and responsibility around the platform at each care unit.</p> <p>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.</p>
unique personal identifier	<p>For practitioners: can be for example e-mail, HSA-ID</p> <p>For patients: can be for example e-mail, personal identity number, insurance number, BSN</p>

12. User Manual versions

#	Date	Description
1.0	2024-03-22	1st version.
2.0	2024-11-08	<p>Main updates are:</p> <ul style="list-style-type: none"> • General: Updated images with better examples. • Chapter 1. <i>About Pathways</i> updated. • Chapter 3. <i>Symbols</i> updated to also contain a definition of the precautions in the User Manuals. • In section 3.1. <i>Symbols definition</i>, the previous warning symbol has been replaced with a caution symbol indicating to the users to consult the instructions for use for relevant warnings and cautions. • Section 8.2. <i>About</i> expanded with "Number of phases" and "Current phase". • Previous section 8.5. <i>Edit an information article in the Manage application</i> removed and reference added to the <i>Smart Care Plans Studio User Manual</i> in Chapter 12. <i>References</i>. • Section 9.1. <i>View questionnaires</i> clarified.
3.0	2025-03-27	<ul style="list-style-type: none"> • General: Pathways renamed to Smart Care Plans. In the manual title and the introduction section, Smart Care Plans - Episodic is used to clarify that this manual describes episodic care flows. • An Introduction chapter has been added including a new section: 1.2. <i>Hardware and software specifications</i>. • Introduction chapter updated with how a care pathway can be activated. • Regulatory updates have been made on the front page and on page 2. • Address to manufacturer updated on page 2 and in section 2.1. <i>Manufacturer</i>. • Contact details chapter updated with a new section 2.3.1. • New symbols described in chapter 3. • New chapter: 4. <i>Smart Care Plans - Intended use</i>.
4.0	2025-05-09	Section 1.1. <i>About Smart Care Plans - Episodic</i> updated.

13. References

Category	Description
Clinic User Manual	<p>Refer to the <i>Clinic User Manual</i> for a description of the general workflows and functionality in Clinic that is not specific to Smart Care Plans.</p> <p>Example of workflows and functionality described in the <i>Clinic User Manual</i>:</p> <ul style="list-style-type: none">• Patient search• Notifications• Users• Shift types• Digital appointments:<ul style="list-style-type: none">• Sync• Asynchronous• Patient profile
Smart Care Plans Studio User Manual	<p>Refer to the <i>Smart Care Plans Studio User Manual</i> for a description on how to edit an information article in the Manage application.</p>