ENGLISH

platform24

User Manual – Manage

Manual version 9.0
2025-08-07

About Platform24

Platform24 is intended to be used to facilitate the interaction between patient and healthcare professionals. Its primary function is to provide a secure, interactive platform for the exchange of medical information, fostering improved communication, understanding, and decision-making in clinical settings. It supports the documentation, retrieval, and display of patient specific health information, thereby assisting healthcare professionals in delivering personalized, informed medical care.

Platform24 is, in Sweden, a National Medical Information System under HSLF-FS 2022:42.

Platform24 includes several different modules, each with its own purpose. The modules are used in different scenarios. Some of the modules qualify as medical devices as they are used to process medical information while affecting the data entered by generating output that is of the benefit of individual patients. The modules qualifying as medical devices have a specific medical purpose that is communicated separately on their respective labels. The other parts of the Platform24 system that are not medical devices qualify as a National Medical Information System.

About Manage

Manage is the administration application for the Platform24 system which Triage24 and Smart Care Plans are part of.

Nationellt Medicinskt Informationssystem

NMI-ID 7350127222001

Platform24 Nationellt Medicinskt Informationssystem Version 1

Consult instructions for use: eIFU provided from within the product and via manufacturers webpage.

2025-05-08

Platform24 Healthcare AB

Söder Mälarstrand 57, SE-118 25 Stockholm

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.

Paligo publication ID	13120 (UUID-ae015f7c-6993-28d0-c6f2-5dd238172fdb)
Paligo internal publication version	10.0

Table of Contents

1. Introduction

1.1. About this manual

This User Manual describes what Manage is and how it can be used to set up and configure settings in Clinic, the Patient app, and roles and permissions for healthcare professionals in Clinic and Manage. To administer the medical content, refer to the separate User Manual for Content Studio (References [77]).

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	• 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	• 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`>

3. Definition of symbols and precautions

3.1. Symbols definition

Version number

Consult instructions for use

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

Date of manufacture

Manufacturer

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. Warnings

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

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

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

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

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

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

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

WARNING
Assign as few roles as possible to each user.

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

5. Intended use Platform24

5.1. Intended use

Platform24 is intended to be used to facilitate the interaction between patient and healthcare professionals. Its primary function is to provide a secure, interactive platform for the exchange of medical information, fostering improved communication, understanding, and decision-making in clinical settings. It supports the documentation, retrieval, and display of patient specific health information, thereby assisting healthcare professionals in delivering personalized, informed medical care.

5.2. User profile

- **Patients**: Patients use the system to communicate with their healthcare provider.
- **Practitioners**: Practitioners use the system to communicate with patients.
- **Administrative users**: Healthcare provider staff that are able to adjust the system to the healthcare provider's needs.

5.3. Operational environment

The patient application installed and used in a smartphone or accessed through a website allows patients to access their personal medical information securely, engage in direct communication with healthcare providers, and manage their health care appointments. This empowers patients to take an active role in their healthcare management, and ensures accessibility to crucial health information. The patients will use Platform24 where they find suitable, in the comfort of their home or on the run.

The practitioners access Platform24 through a web interface to interact with patients and their data to deliver healthcare services. The healthcare practitioner usually runs a web browser on a computer situated in an office or practice, but are also able to use the interface through the web interface at home.

5.4. Contraindications

Certain users shall not use the system:

1. Patients with life-threatening symptoms, serious conditions or trauma.
2. Patients physically or cognitively unable to use digital technology such as smartphones or computers.

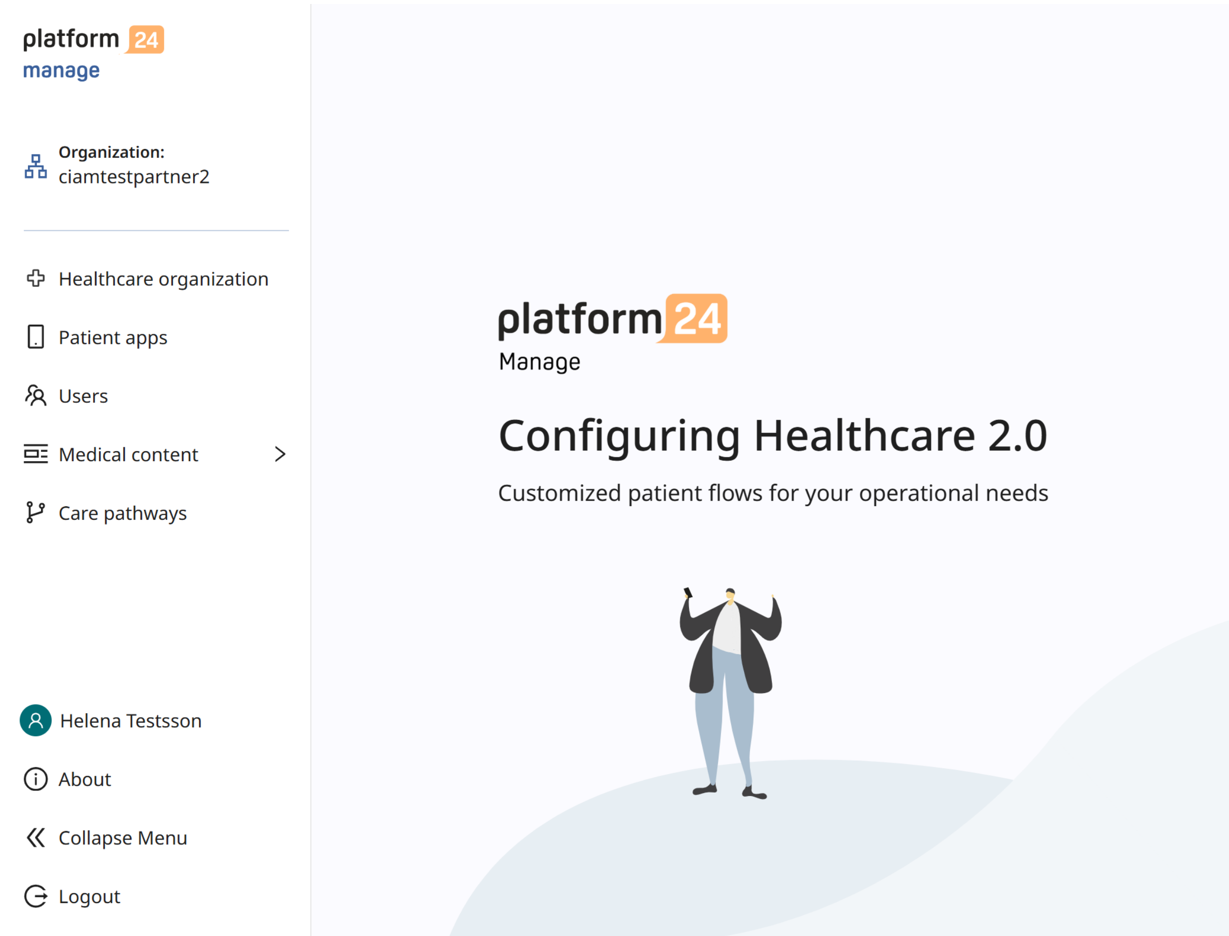
6. About Manage

6.1. What is Manage?

Manage is the administrator interface in Platform24. Use it to manage users, configure patient flows and to configure local settings for Clinic, the Patient app, and the Triage24 medical content. You can also manage roles and permissions for users in both Clinic and Manage.

Platform24 includes three applications:

- Manage – for administrators
- Clinic – for healthcare practitioners
- Patient app – for the patients' digital care journey



6.2. Manage functionality

Changes made in Manage apply only to your organization, allowing you to adapt the Patient app and Clinic to how your care units are set up.

Manage is a powerful tool that significantly can affect how patients and healthcare practitioners use the system. Therefore, users editing in Manage are required to have basic training in the use of Manage and to read this User Manual to further understand the functionality.

All configuration changes (excluding user administration) must be validated before going live in the production environment with real patients and healthcare practitioners. In addition to the validation steps built into the tool, each customer is responsible to develop a validation and test process for any changes made to the settings of the Patient app and Clinic.

Once your internal validation steps are complete, Platform24 will perform a technical review. The purpose of the technical review is to ensure that no changes will affect the technical conditions for the application usage. The technical review does **NOT** include, for example, a review of the content of text changes.

All unpublished changes will be included in the technical review. To reduce the review scope, we recommend to regularly move changes to production.

If you manage your own medical content, you are also responsible for performing the technical reviews.

6.3. Locating Manage

6.3.1. Platform24 environments

Platform24 uses two different environments:

Demo The **Demo** environment is used to freely test and try out the Patient app and Clinic while learning to use the platform.

This is also the environment where all changes to the configuration are tested before they are sent on to the production environment.

The links to these pages are provided by your Platform24 Product Success Manager or Customer Success Manager.

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

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

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

7. Log in and log out

7.1. Log in to Manage

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

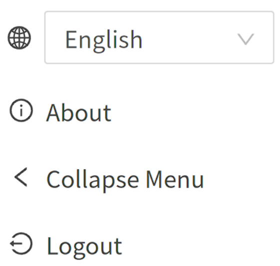
   NOTE
   Some customers might have a unique environment link. Talk to your superuser if the link does not work.

2. Log in using your selected authentication method.

   NOTE
   The selected authentication method is customer-specific. Talk to your superuser if you are unsure about the login process at your clinic.

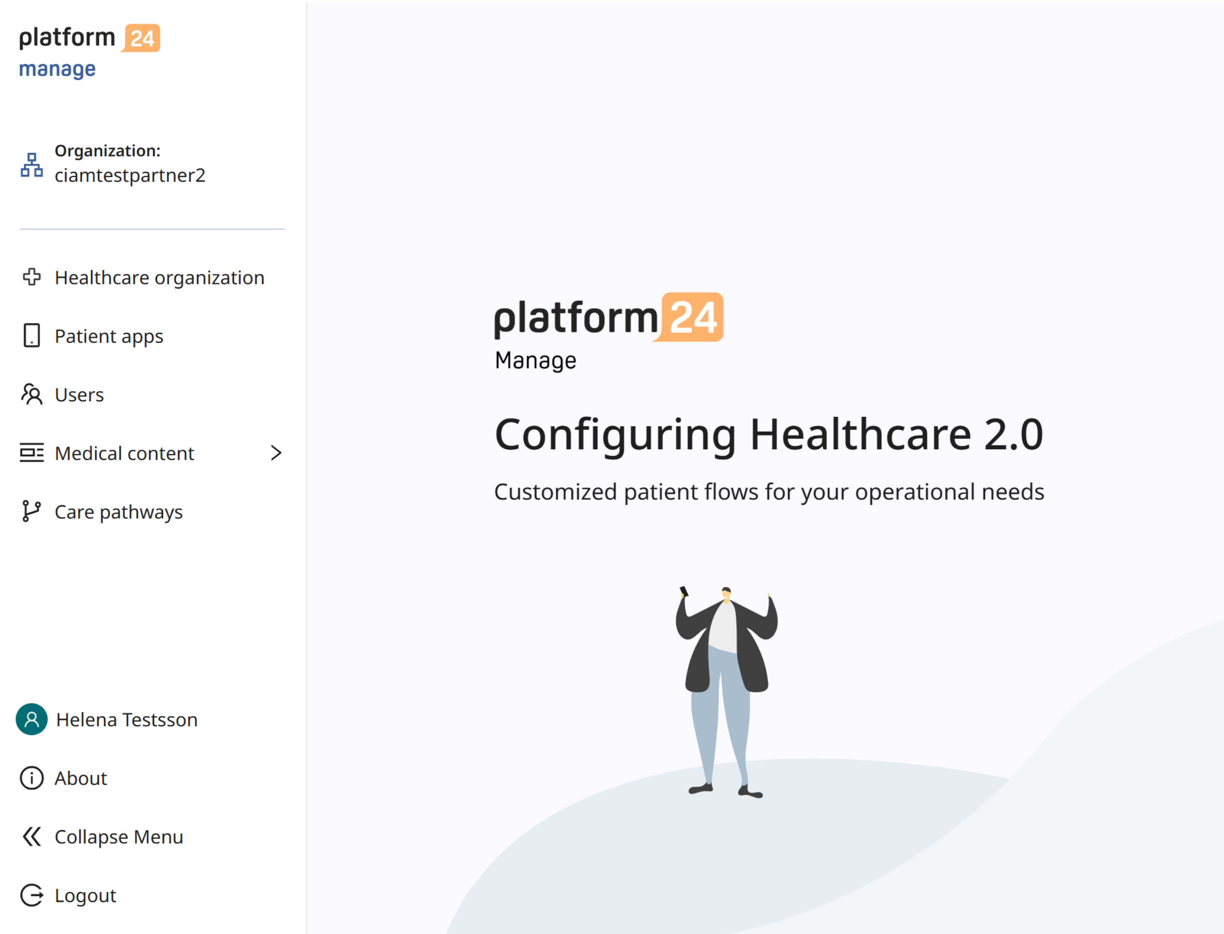
7.2. Log out of Manage

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



8. Main menu

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



Healthcare organization

Settings for the care provider and care units in Clinic. For more information, see Configurations and settings for the healthcare organization in Clinic [18].

Patient apps

Settings for the Patient applications. For more information, see Configurations and settings for Patient apps [31].

Users

Administration of users, roles and permissions.

- For details on how to administer users, see Administering users in Platform24 [40].
- For details on how to administer roles and permissions, see Roles and authorizations for users in Clinic [43] and Roles and authorizations for users in Manage [60].

Medical content

Editing of:

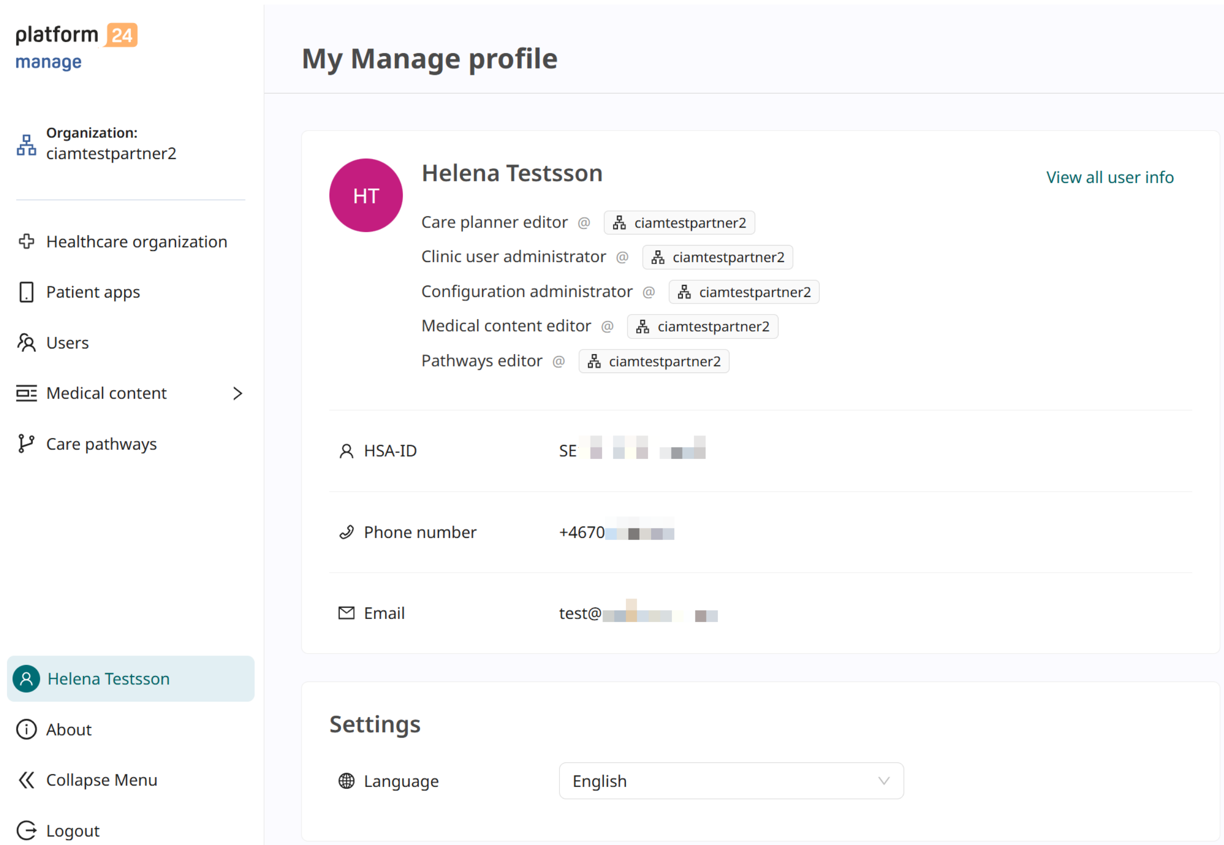
- the medical content that is used in the Triage24 product. (see separate User Manual for Content Studio+ (References [77])
- non-routing questionnaires (see separate User Manual for Content Studio (References [77])

Care pathways	Editing of the care pathways that are used in the Smart Care Plans product. See the separate User Manual for Smart Care Plans Studio (References [77]) for details on how to edit the care pathways.
About	Information about Manage, such as for example manufacturing information and links to user manuals.

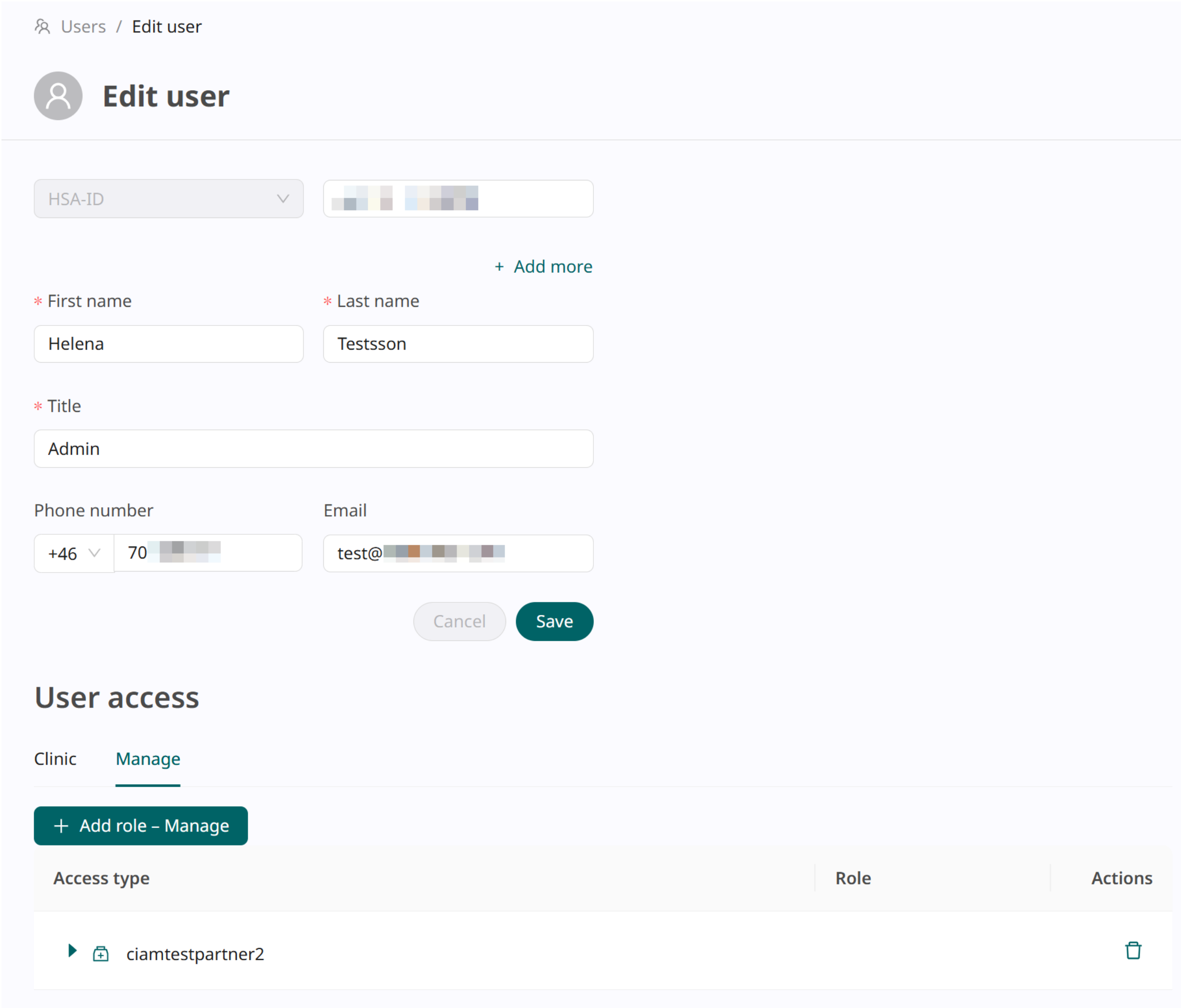
8.1. Your Manage profile

Click on your name in the main menu to open your profile in Manage. In this view you can view your personal settings. All your assigned Manage roles are displayed in the upper part of the view.

Here you can also select the language you want to use in the Manage application. This only affects the language in Manage and not in Clinic or the Patient apps.



To edit your personal settings, click **View all user info** in the top right corner. This opens the **Edit user** interface.



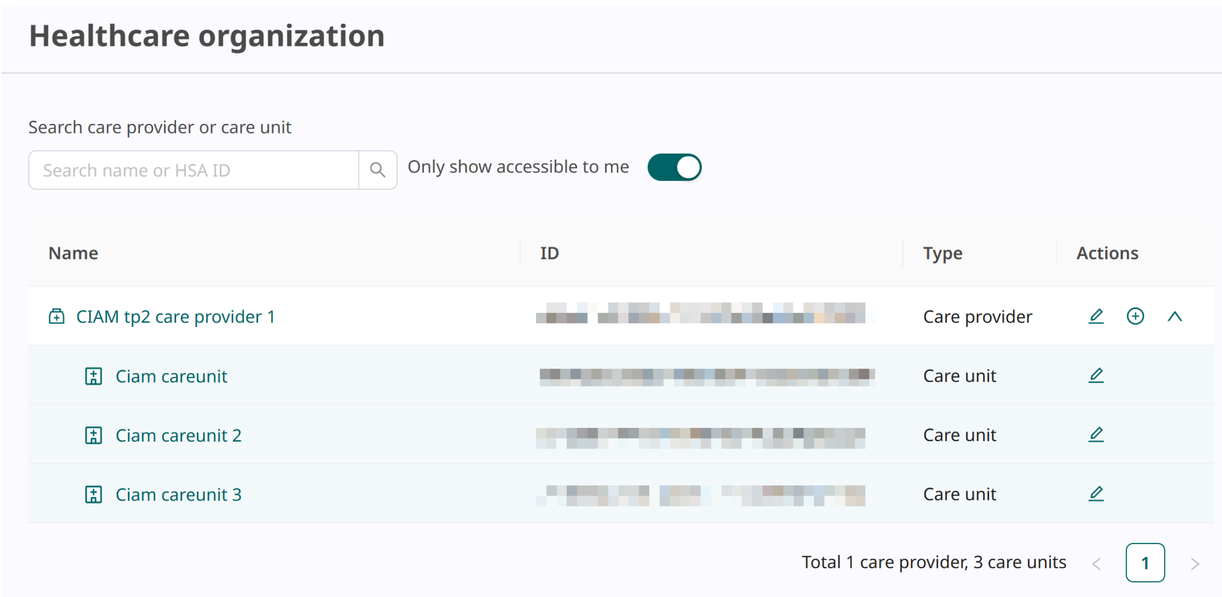
9. Configurations and settings for the health-care organization in Clinic

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

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

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

Click on **Healthcare organization** in the Manage main menu to start editing settings for the entire care provider and for individual care units in your organization.



Deactivate the **Only show accessible to me** option to see the entire organization (and not only the parts you have access to). The list is ordered alphabetically, but also displays the parts accessible to you first in the list.

Depending on your access rights, settings can be updated for a specific care provider or for individual care units. The higher up in the organization a user has *Configuration administrator* permissions, the more capabilities that person has for administration and customization. For more information about the capabilities on various levels of the organization, see Configuration administrator – Care unit [61].

9.1. Announcements

It is possible to share important information with healthcare staff through announcements. These announcements are created in Manage and appear at the top of the Clinic interface to make sure that critical information is not missed.

Two active general announcements can be displayed at the same time:

- One that is visible to the entire care provider.
- One that is visible to a specific care unit.

9.2. Care provider settings

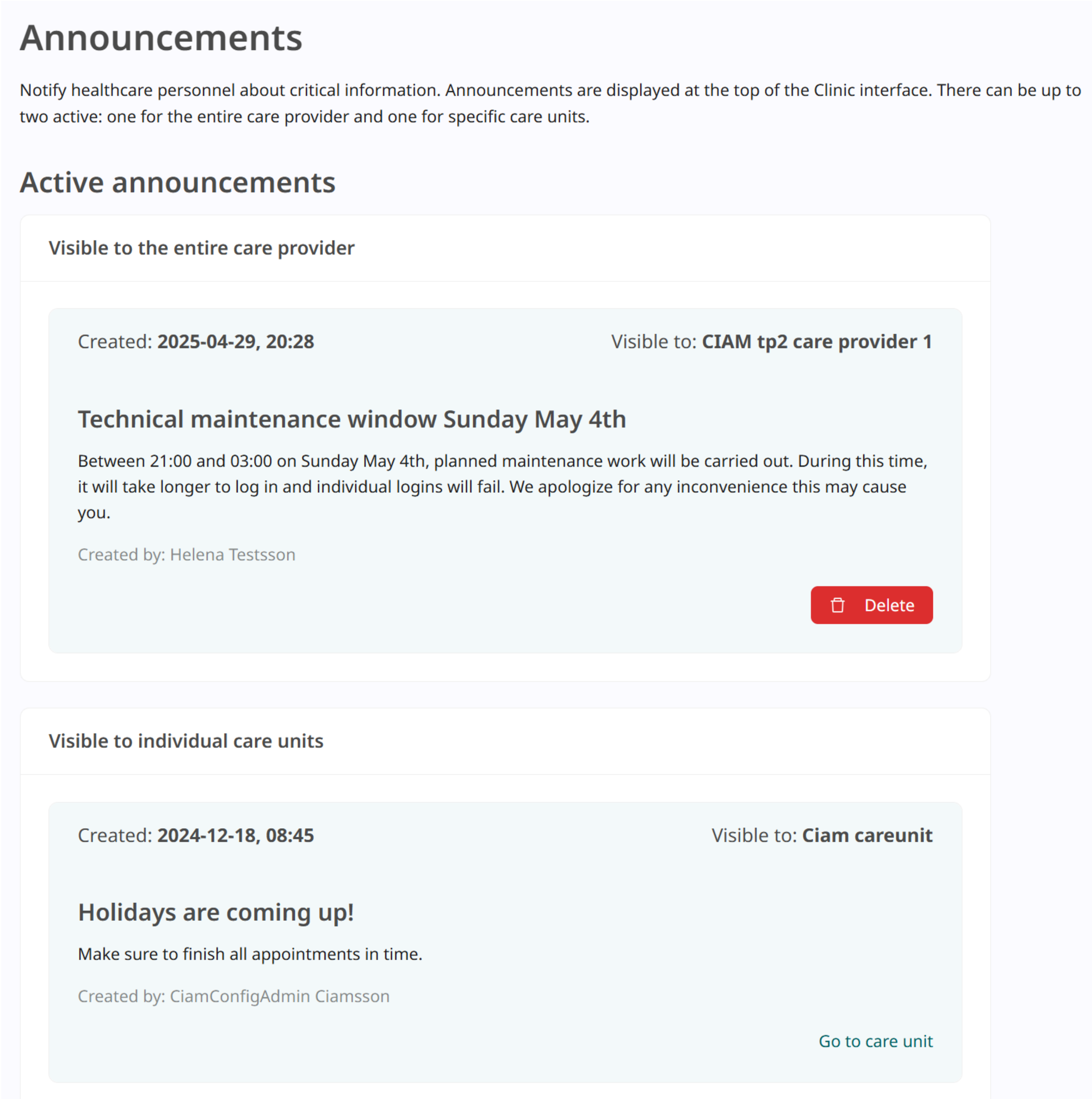
To edit settings for the care provider, click on the pen at the end of the care provider row. This opens up the **Announcements** tab where Announcements in Clinic for the entire care provider can be set.

9.2.1. Announcements for the care provider

In the **Announcements** tab for the care provider, all active announcements for both the care provider and care units are displayed. In this view, you can add or remove announcements for the care provider and get redirected to manage any individual announcements for a specific care unit.

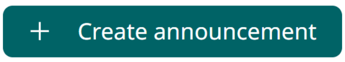
An announcement that has been published cannot be edited. To edit a published announcement, you need to delete the existing one and create a new one.

Delete an announcement by clicking the **Delete** button. Note that you need to be in the correct view to delete it: either in the care provider view or in the care unit view, depending on where the announcement was created.

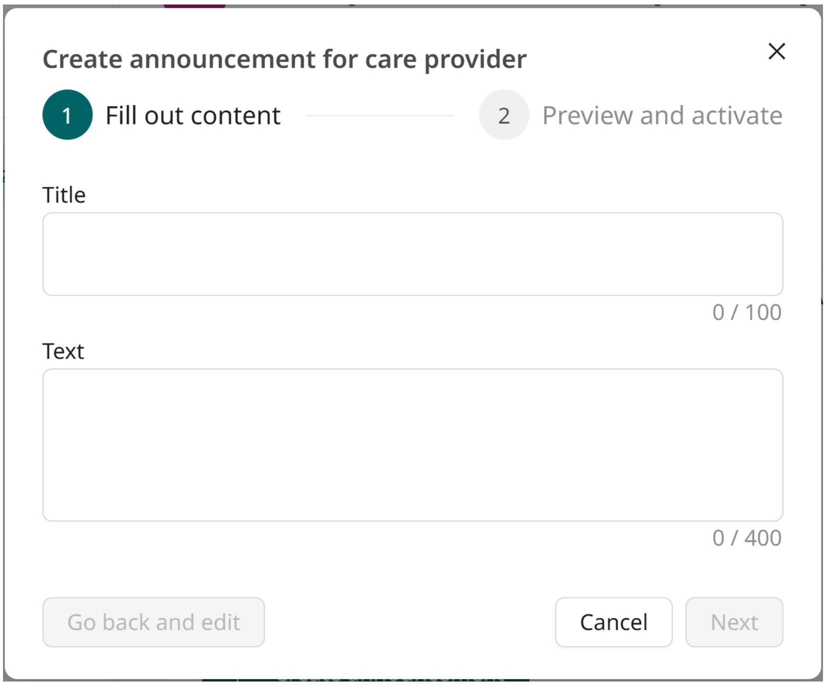


Create new announcement for the care provider

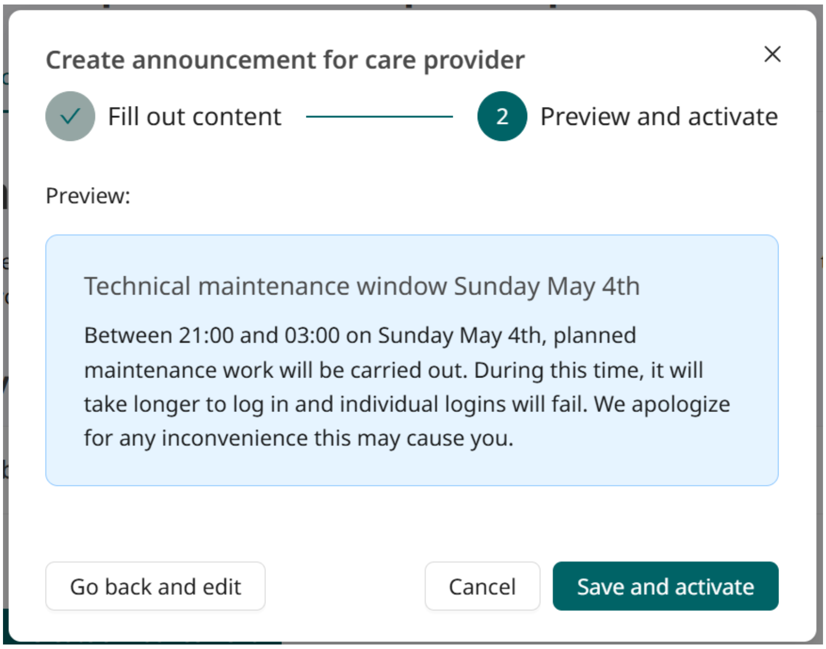
1. In the **Actions** column, click the pen on the care provider row where you want to add an announcement.
2. Click the **+ Create announcement** button.



3. Fill in the **Title** and **Text** that should be displayed in the announcement.



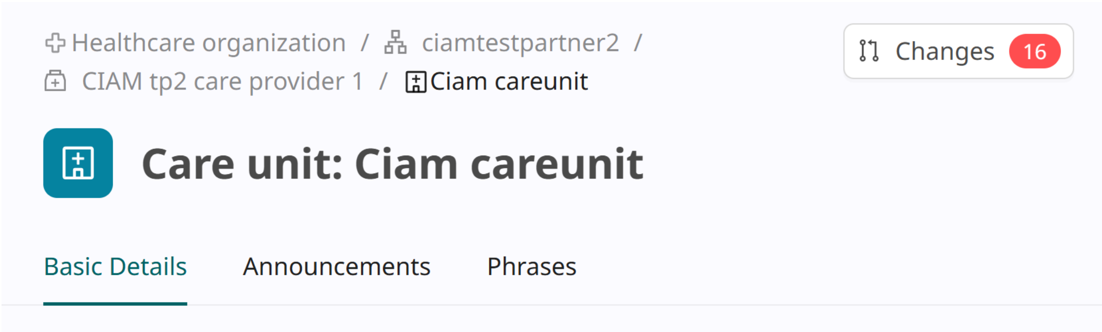
4. Click **Next**.
5. Review the preview of the announcement.



If everything looks good, click the **Save and activate** button. Note that the announcement will activate directly.

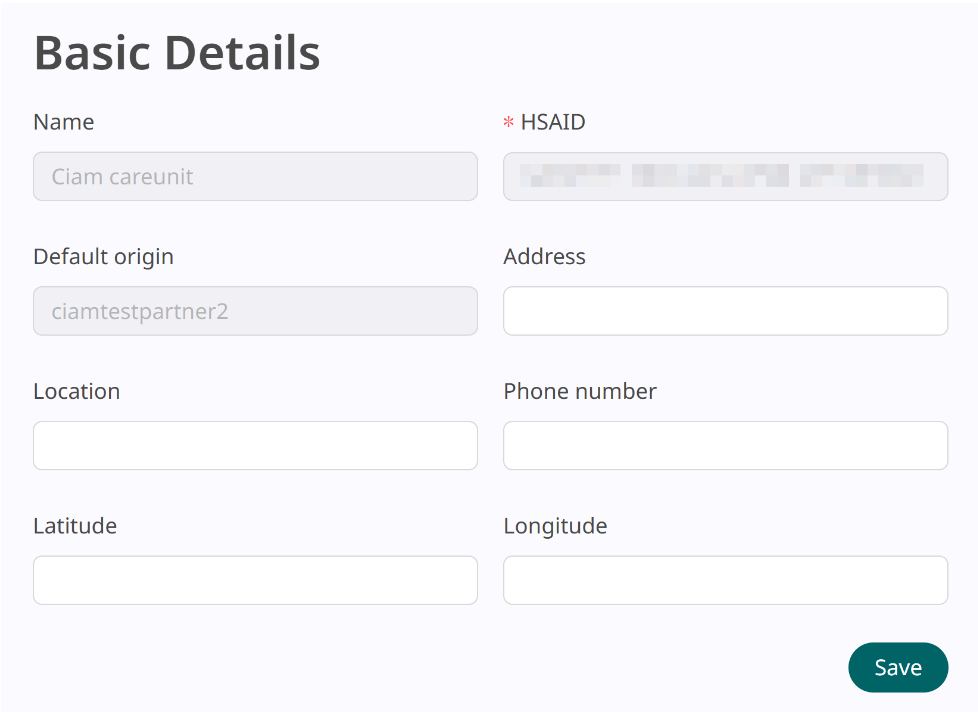
9.3. Care unit settings

To edit settings for a care unit, click on the pen at the end of the care unit row. This opens up a number of tabs where changes for the care unit can be made.



9.3.1. Basic details

In the **Basic Details** tab, you can edit the basic information for the care unit. The fields **Name**, **HSAID** and **Default origin** are locked/disabled as they should not be updated by customers. Remember to click **Save** after you have edited the information.



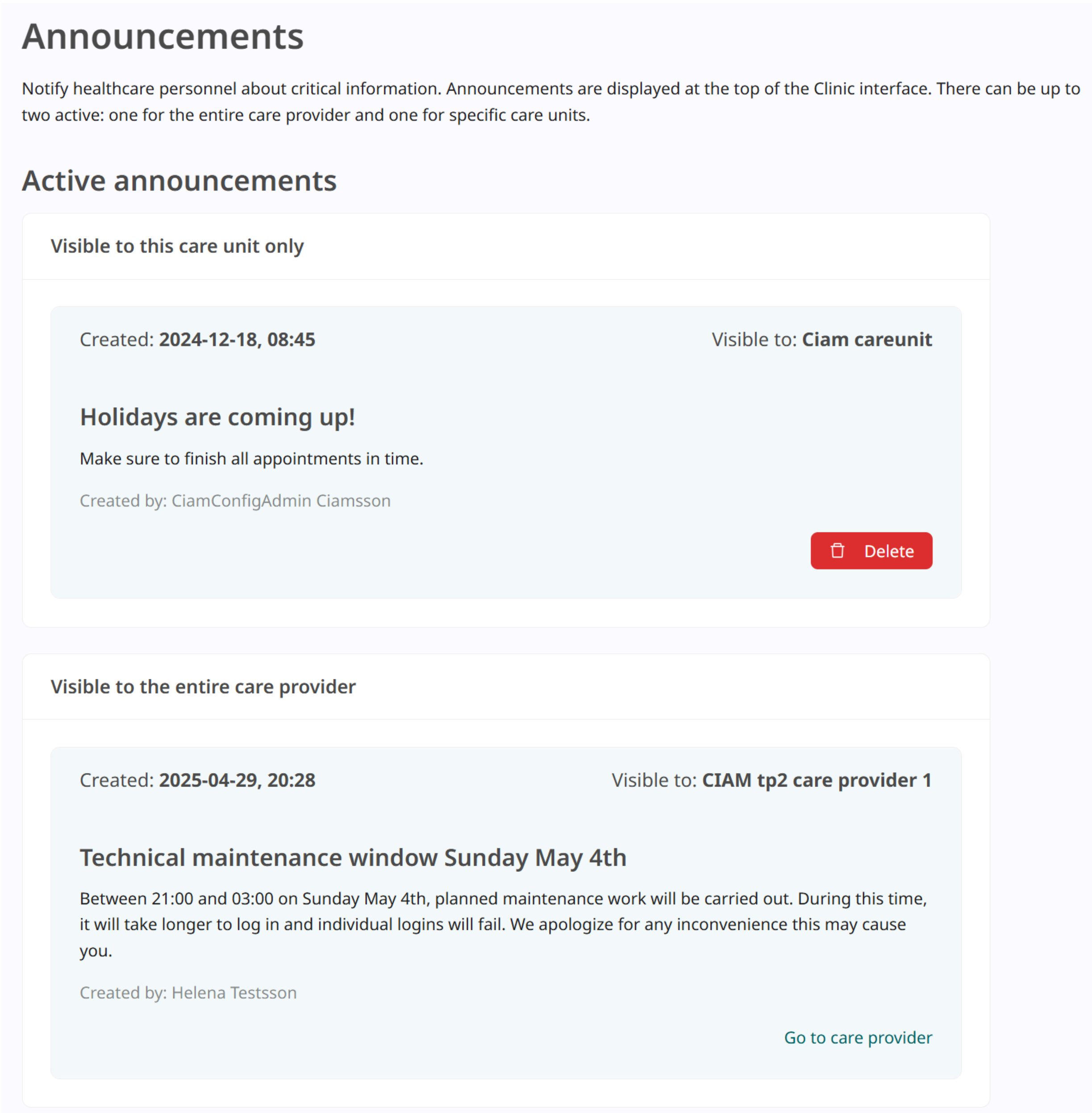
Name	The name of the care unit. It is the name visible to the practitioners in Clinic and to the patients in the Patient app. (Locked field)
HSAID	The external ID of the care unit. (Locked field)
Default origin	The origin (Patient app) the care unit primary will use to book meetings. (Locked field)
Address, **Location**	The address and location of the care unit.
Phone number	The phone number the care unit can ask patients to use when calling the care unit.
Latitude, **Longitude**	Coordinates used to enable displaying the care unit on a map.

9.3.2. Announcements for individual care units

In the **Announcements** tab for an individual care unit, all active announcements for both the care provider and the specific care unit are displayed. In this view, you can add or remove announcements for the specific care unit and get redirected to edit announcements for the care provider.

An announcement that has been published cannot be edited. To edit a published announcement, you need to delete the existing one and create a new one.

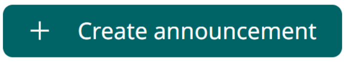
Delete an announcement by clicking the **Delete** button. Note that you need to be in the correct view to delete it: either in the care provider view or in the care unit view, depending on where the announcement was created.



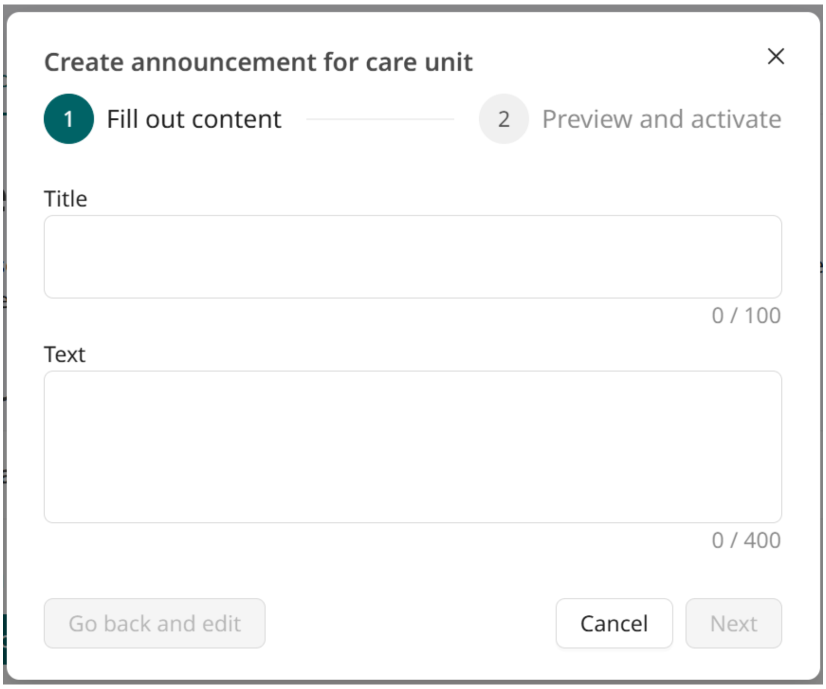
Create new announcement for a care unit

1. In the **Actions** column, click the pen on the care unit row where you want to add an announcement.

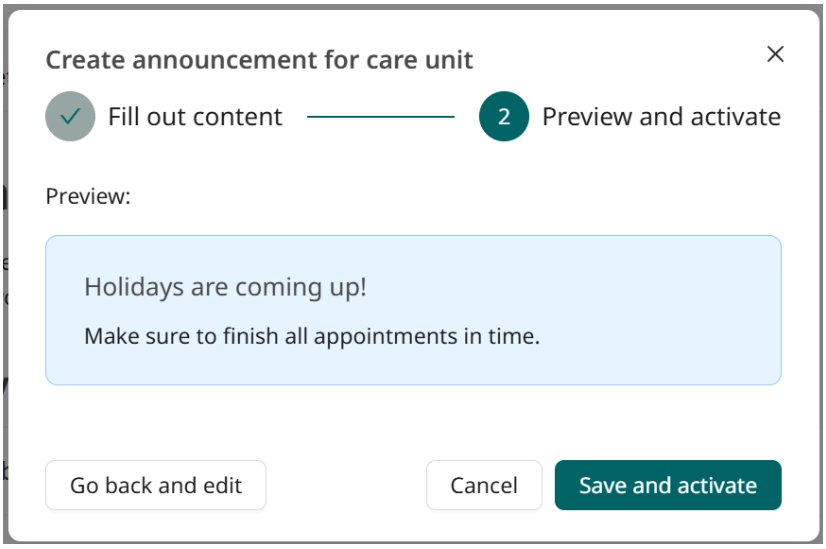
2. Click the **+ Create announcement** button.



3. Fill in the **Title** and **Text** that should be displayed in the announcement.



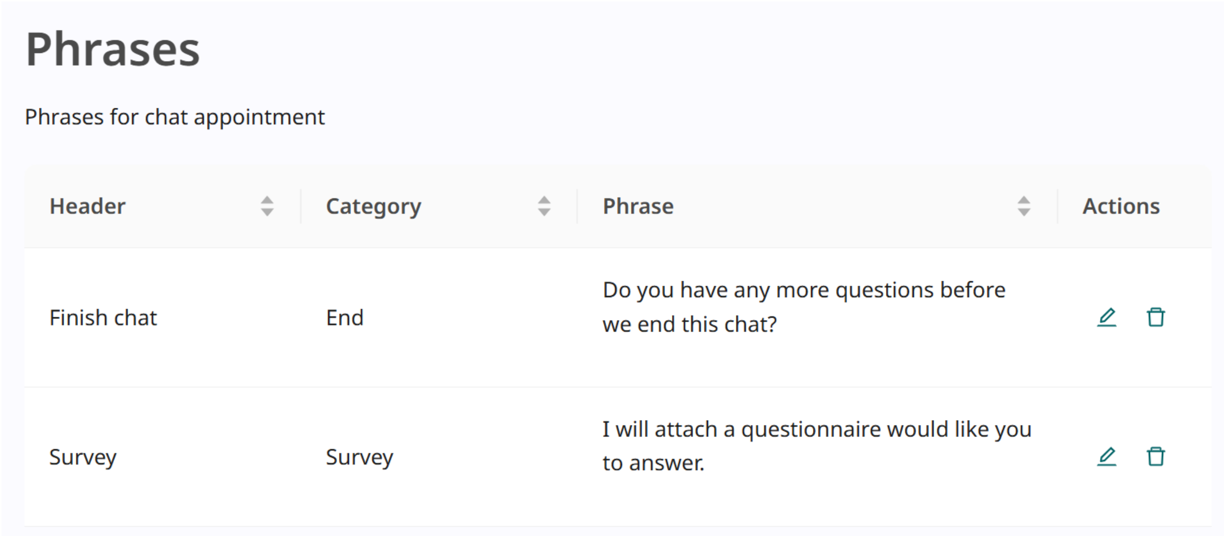
4. Click **Next**.
5. Review the preview of the announcement.



If everything looks good, click the **Save and activate** button. Note that the announcement will activate directly.

9.3.3. Phrases

In the **Phrases** tab, you can create, edit or delete pre-formulated messages (phrases) that can be sent by clinicians to the patients in the Clinic chat. By providing all clinicians with access to the same set of phrases, appointments can be conducted more efficiently, while patient interactions can become more consistent and streamlined.

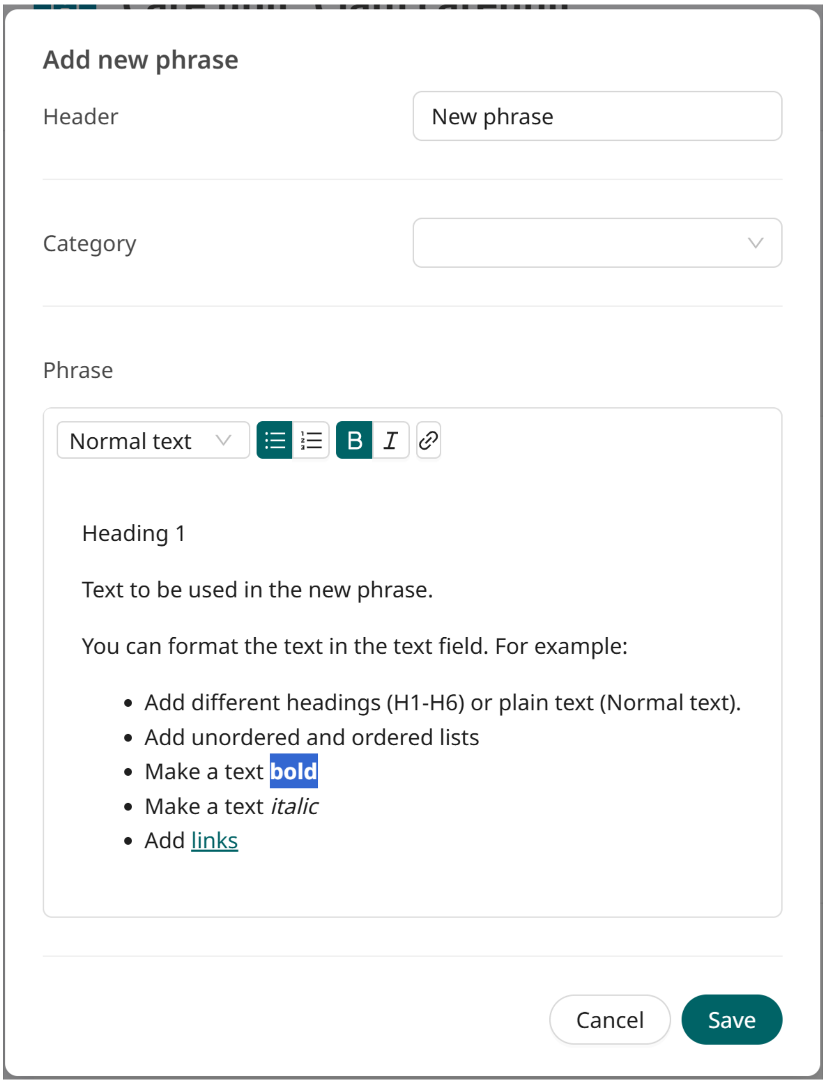


The phrases are administered via Manage but sent out in Clinic for the care unit they are defined for.

Add a new phrase

1. Click the plus button in the bottom right corner.

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



2. Add a phrase title in the **Header** field. The title will only be shown internally for practitioners.
3. If desired, select a phrase **Category**. If the care unit has many phrases, defining phrase categories makes it easier for a practitioner to find the correct phrase.
   A new category can either be created when creating a new phrase (this instruction), or separately with the intention to be used in the future. For instructions on how to create a phrase category for future use, see Create a new phrase category [27].
4. Add the phrase in the **Phrase** area. The following formatting options that can be used when creating a phrase:

Text style	Specify heading levels (H1-H6) and normal text
Bulleted list	Create a bullet list
Numbered list	Create a numbered list
Bold style	Specify bold text style
Italic style	Specify italic text style
Add link	Use this option to add a link. For detailed instructions, see Add a link in a phrase [28].

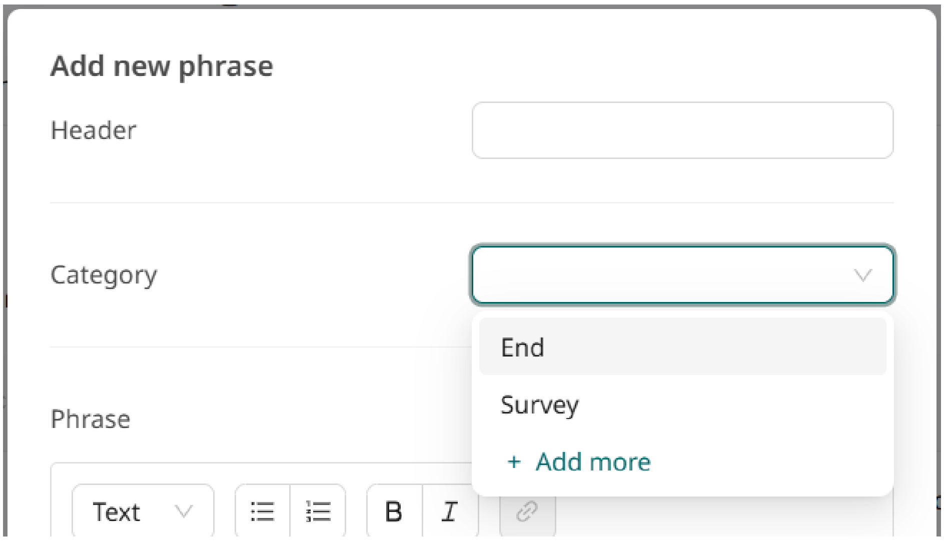
5. Click on the **Save** button to save your phrase.
   The phrase will now be shown in the **Phrases** list and can be used by practitioners in Clinic.

Create a new phrase category

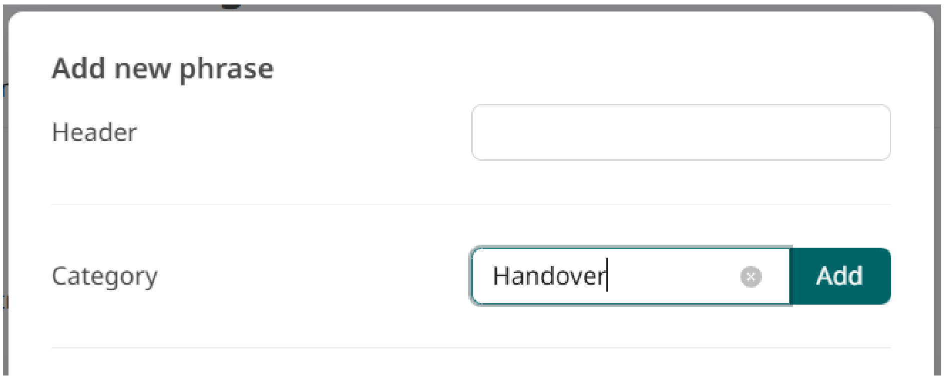
A new phrase category can either be added when creating a new phrase (see Add a new phrase [25]), or created separately for future use.

To create a phrase category for future use:

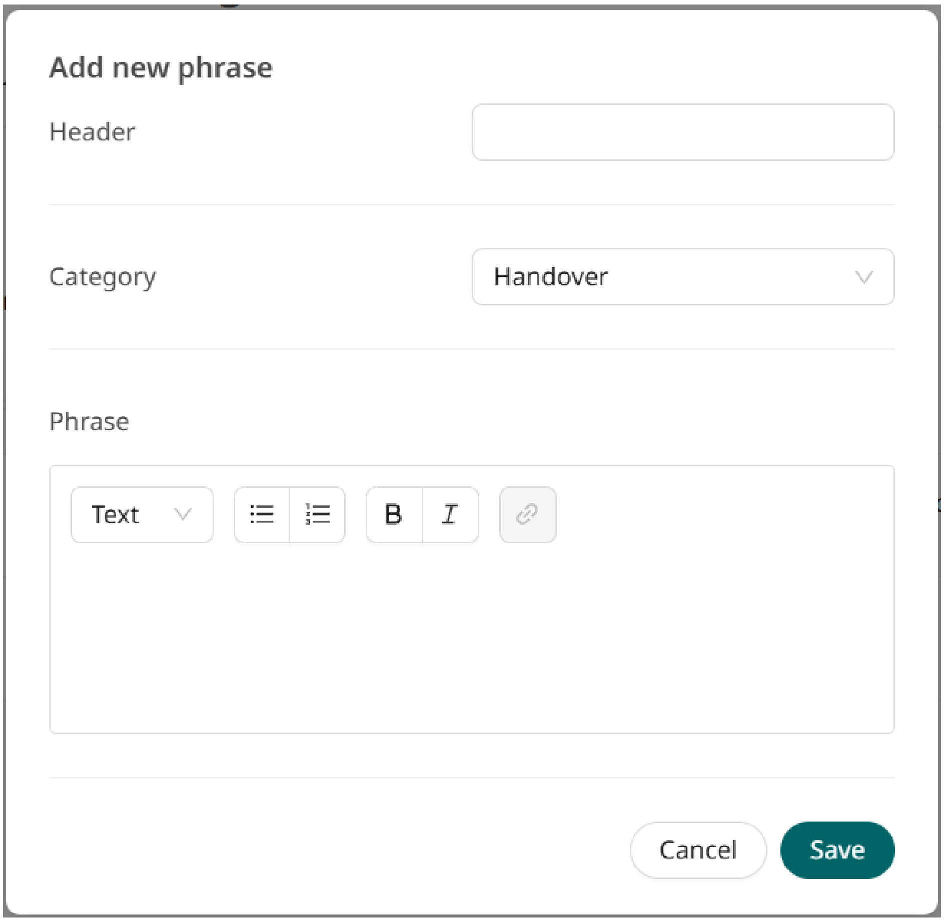
1. Click the plus button in the bottom right corner to open the **Add new phrase** dialog.
2. Click the arrow in the **Category** list to expand it.



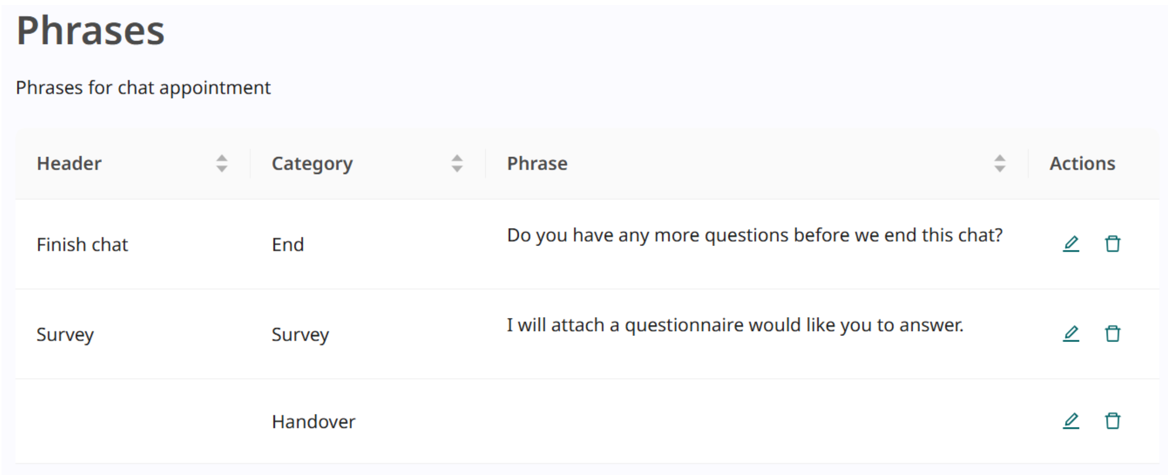
3. Click the **+ Add more** option in the list.
4. Enter the name of the new category and click **Add**.



5. Leave the rest of the dialog empty and click **Save**.



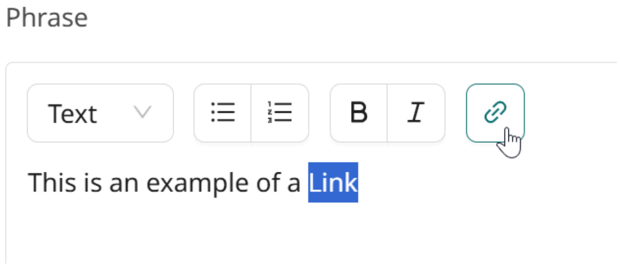
6. The new category is now created and displayed in the **Phrases** list. This category is now available to select when creating additional phrases for the care unit.



Add a link in a phrase

1. Write the name the link should have in the phrase.

2. Highlight the link name and click the link button.

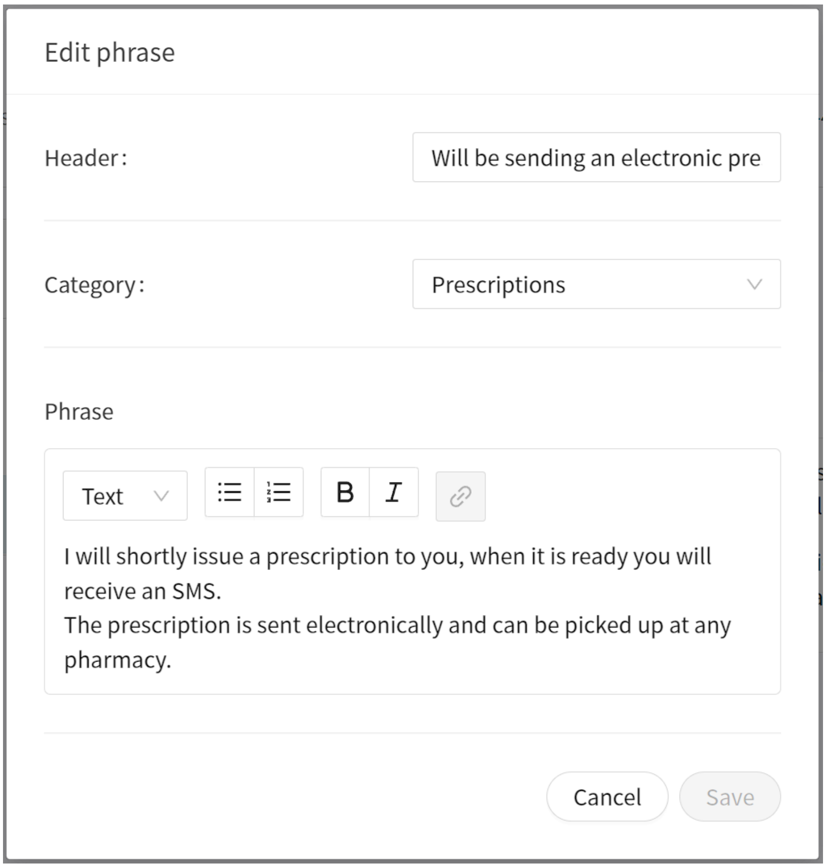


A dialog then opens up where you add the link value.

3. Click **Save**.

Edit a phrase

1. Click on the pen icon in the **Actions** column at the end of the row. This opens the **Edit phrase** dialog.

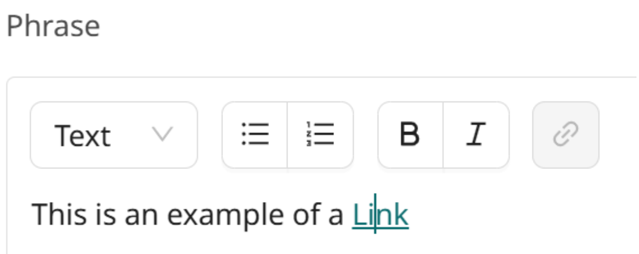


2. Edit the phrase as desired. For instructions on how to edit a link, see Edit a link in a phrase [30].

3. Click the **Save** button to save your phrase.
   The changed phrase will be updated in the **Phrases** list.

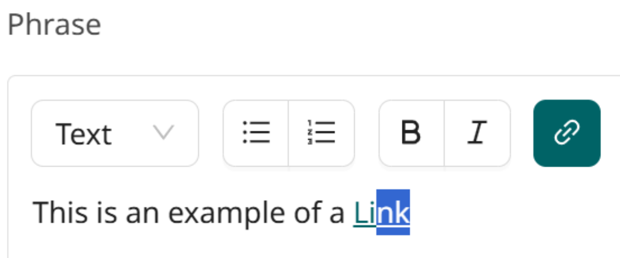
Edit a link in a phrase

To edit the link name, place the cursor somewhere inside the link name and type. The link name is what will be visible to patients.



To edit the link value (the actual link):

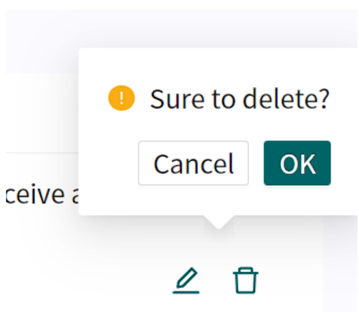
1. Highlight one or more letters of the link name and click the link button.



2. Make the desired changes and click **Save**.

Delete a phrase

1. Click the trash can icon in the the **Actions** column at the end of the row.
2. Click **OK** in the pop up window to verify the deletion of the phrase.



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

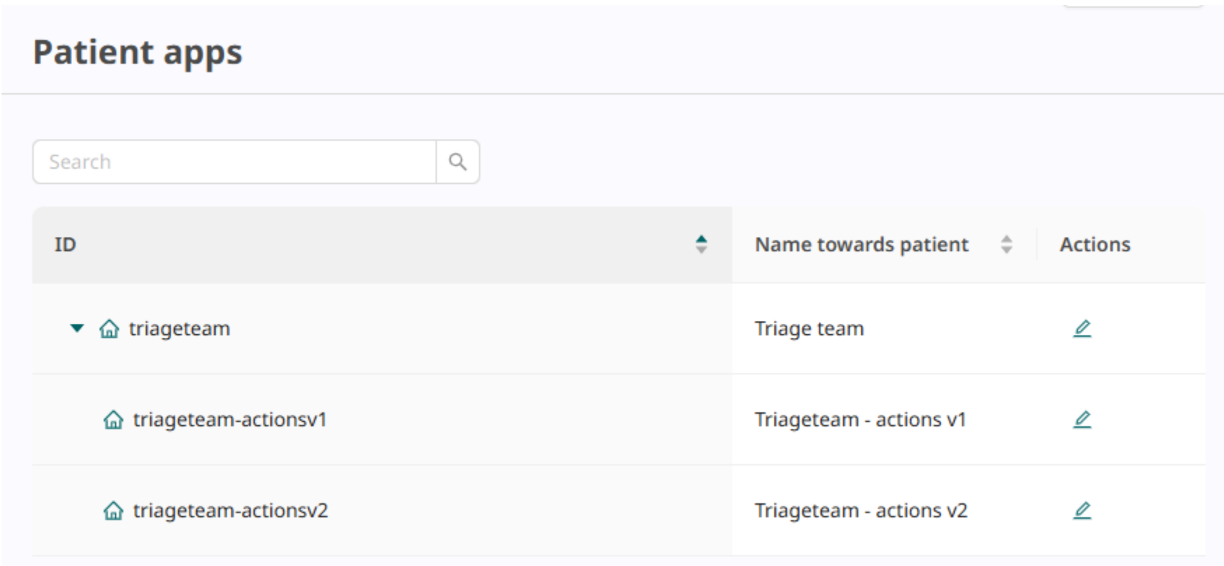
10. Configurations and settings for Patient apps

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

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

Select **Patient apps** in the Manage main menu to start editing the patient apps.

If your organization has several Patient apps, the list of Patient apps is displayed by clicking on the arrow in front of **ID**.



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

The higher up in the organization a user has *Configuration administrator* permissions, the more capabilities that person has for administration and customization. For more information about the capabilities on various levels of the Patient apps, see Configuration administrator – Patient app [61].

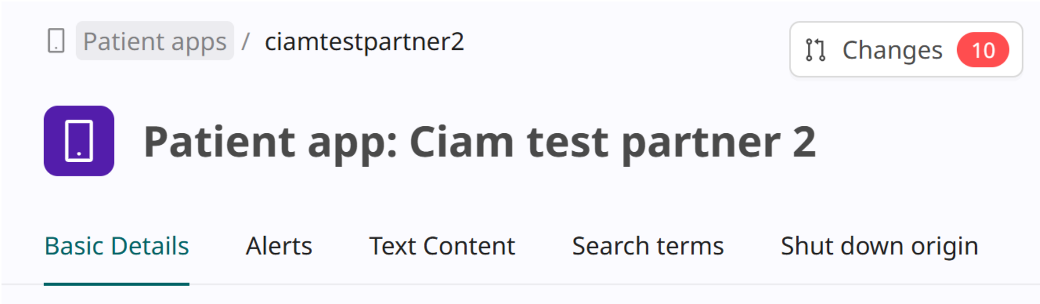
10.1. Adding a new Patient app

To add a new Patient app to your organization, click the plus button next to the pen .

NOTE
It is good practice to do the step to add a new Patient app in cooperation with your main contact at Platform24 (Product Success Manager or Customer Success Manager) who can guide you through the start-up and addition of a new Patient app.

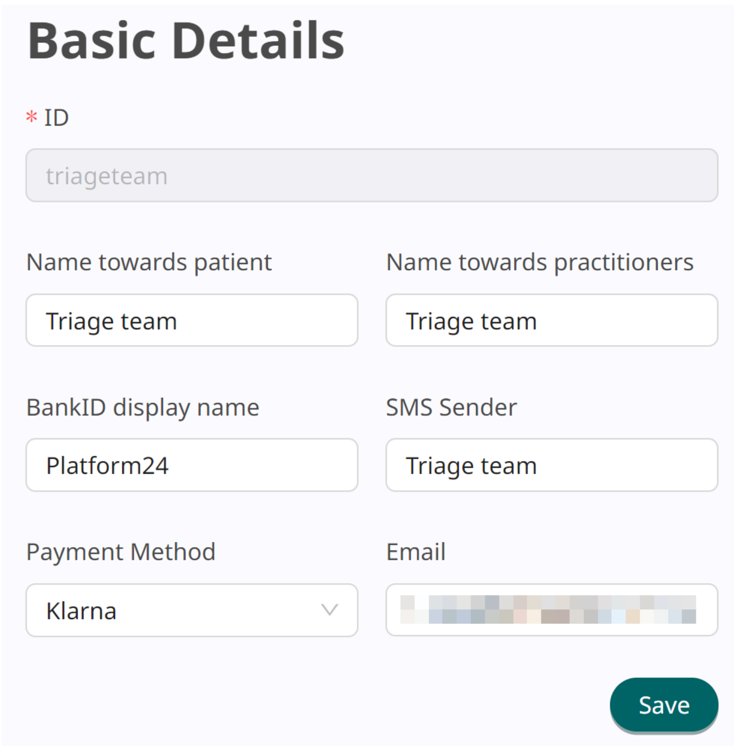
10.2. Editing settings for Patient apps

To edit settings for a Patient app, click on the pen at the end of the Patient app row. This opens up a number of tabs where changes can be done for the Patient app.



10.2.1. Basic details

Basic Details is the tab where the basic information is set for the Patient app. Remember to click **Save** after you have edited the information.



ID
The ID used throughout the entire system to refer to this specific Patient app.

Name towards patient
The name visible to the patients in the Patient app and in SMS or emails.

Name towards practitioners
The name visible to the practitioners in Clinic if a patient connects through this Patient app.

BankID display name
The name displayed in the BankID application to the patient when logging in to the Patient app.

SMS Sender
The text shown as sender when an SMS is sent to the patient.

Payment Method
Payment Method can be set to **Offline** or **Klarna** by using the drop down list. Note that to implement payment flows in the Patient app, you need to contact your Platform24 Product Success Manager or Customer Success Manager for activation.

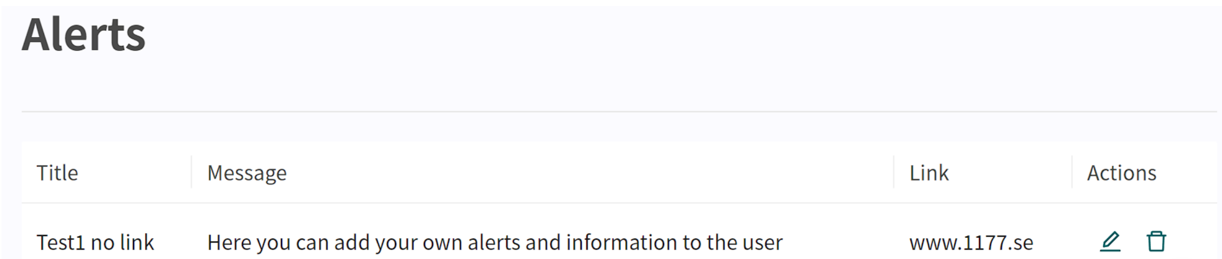
- **Offline** With the **Offline** setting, the care providers take responsibility for invoicing.
- **Klarna** Using **Klarna**, the payment is processed before the patient can initiate an appointment.

It is possible to use rules to set which sums to apply on different patient flows. Contact your Platform24 Product Success Manager or Customer Success Manager to configure your pricing.

Email
The email address communicated to patients, e.g. in emails.

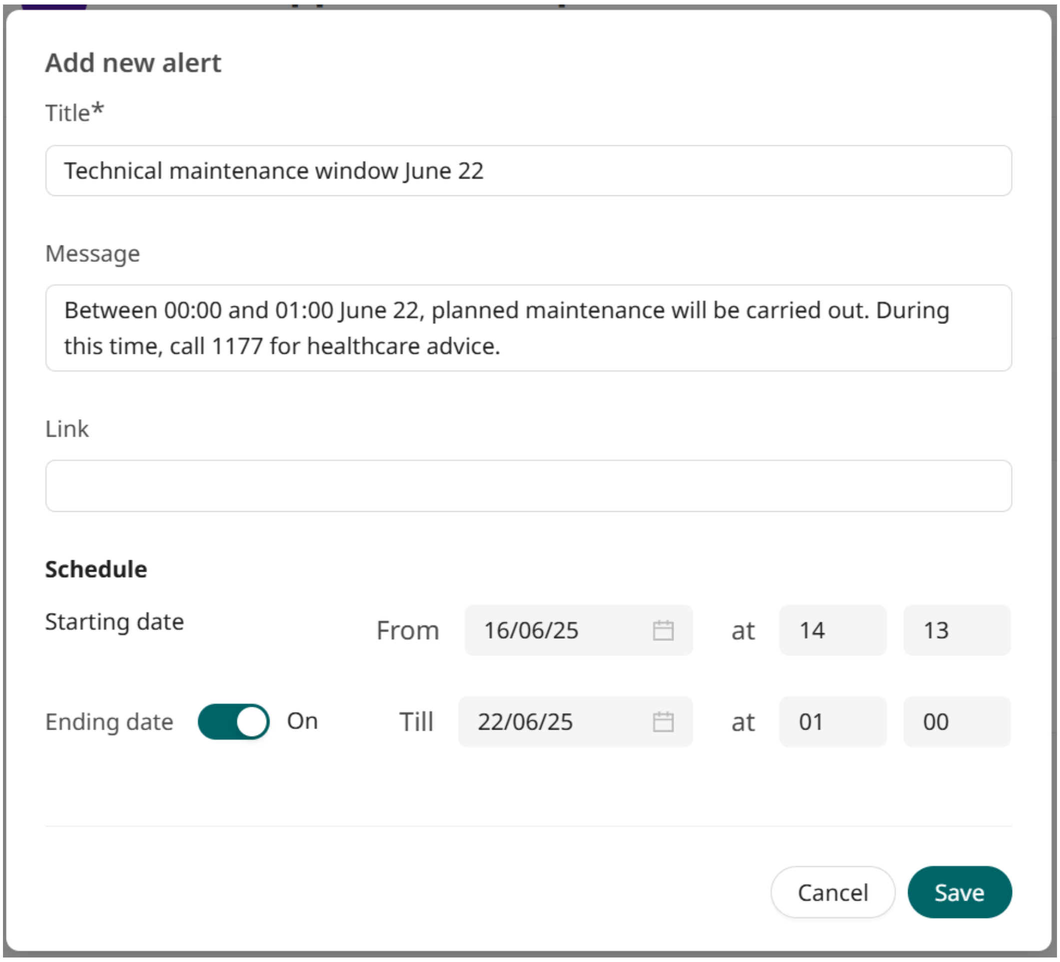
10.2.2. Alerts

The **Alerts** tab is used for adding news items or alerts to the Patient app.



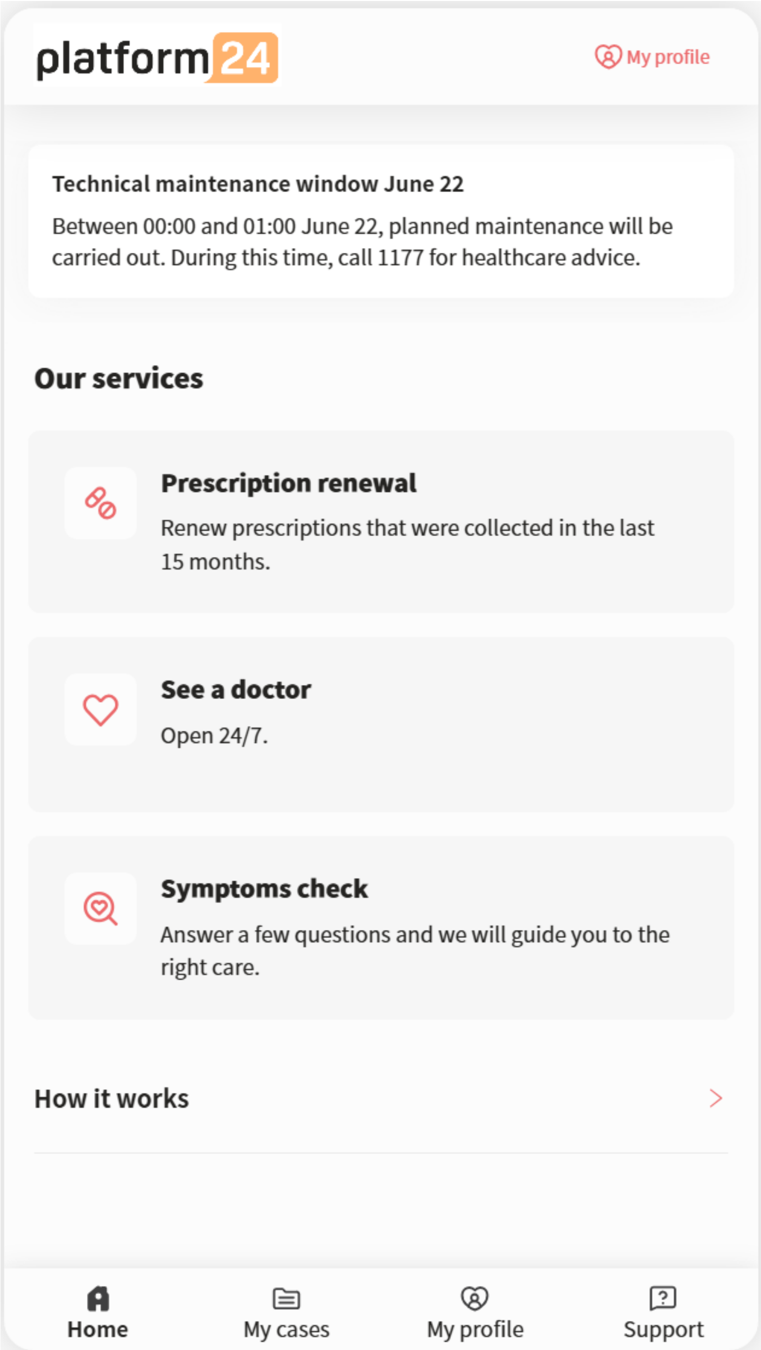
To add a new alert:

1. Click the plus button in the bottom right of the screen. This will open the **Add new alert** dialog.



2. Enter the title for the alert in the **Title** field. It will be displayed in bold in the Patient app.
3. Enter the information that will be visible in the alert in the **Message** field.
4. It is possible to add a link in the **Link** field that will be visible under the text **Read more** where the patient can find more information.
5. In the **Schedule** section, add the starting date and time for the alert and optionally an ending date and time.
6. Click **Save**.

This is an example of how this alert will look in the Patient app.



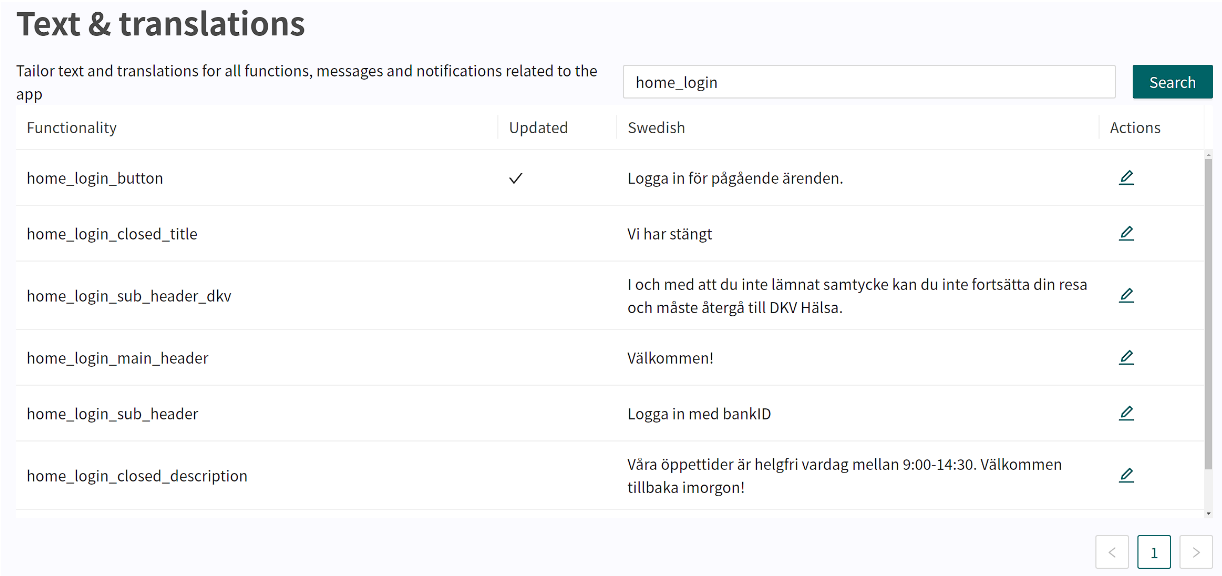
To edit an existing alert, click the pen icon in the **Actions** column. To delete an existing alert, click the trash bin icon in the **Actions** column.

10.2.3. Text content

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

The default setting in the app allows the standard system texts to be used and displayed here. The standard texts can also be modified by the customer. Customer-specific (modified) texts are indicated by the "Updated" checkmark.

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



Text & translations

Tailor text and translations for all functions, messages and notifications related to the app

home_login Search

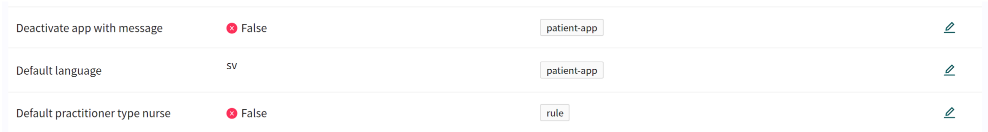
Functionality	Updated	Swedish	Actions
home_login_button	✓	Logga in för pågående ärenden.	
home_login_closed_title		Vi har stängt	
home_login_sub_header_dkv		I och med att du inte lämnat samtycke kan du inte fortsätta din resa och måste återgå till DKV Hälsa.	
home_login_main_header		Välkommen!	
home_login_sub_header		Logga in med bankID	
home_login_closed_description		Våra öppettider är helgfri vardag mellan 9:00-14:30. Välkommen tillbaka imorgon!	

1

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

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

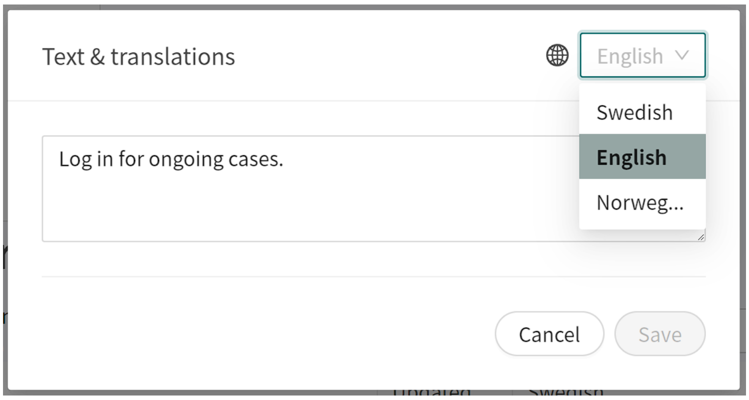
Language The languages that are defined to be used as default for the Patient app are visible here. The languages can be changed via the **Customizations** menu item through the setting **Default language**.

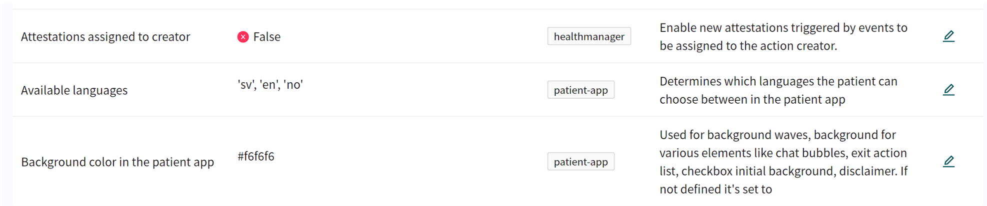


Deactivate app with message	False	patient-app	
Default language	sv	patient-app	
Default practitioner type nurse	False	rule	

Actions

Click on the pen at the end of each row to edit the text.
Change the text in the text box and click **Save** when done. Do not forget to edit the text for all available languages defined for the Patient app by using the language selector in the top right corner.
The languages defined for the Patient app can be changed using the **Customizations** menu item in the setting **Available languages**.





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

10.2.4. Common search terms

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

It is possible to edit the common search terms with the search terms that the customer wants to use, perhaps based on the season or focus of the organization. Any changes in the common search terms made by the customer need to be reviewed and approved by the Platform24 support team.

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

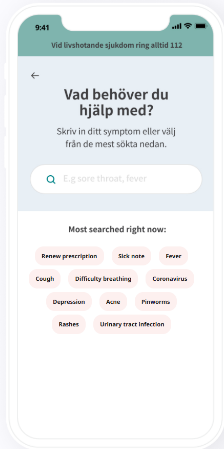
The customers who use the existing medical content from Platform24 can use the questionnaires and search terms that are included there.

Show search terms in app

Common search terms

Here you can add, edit and delete the most common search terms displayed in the patient app. A maximum of 10 search terms can be set.

Order	Condition	Search term ID	Display label	Actions
0	renewPrescriptions	renewPrescriptions	Swedish: Förnya recept English: Renew prescription	
1	medicalCertificate	medicalCertificate	Swedish: Sjukintyg English: Sick note	
2	feverCondition	feverCondition	Swedish: Feber English: Fever	
3	cough	cough	Swedish: Hosta English: Cough	
4	breathing	breathing	Swedish: Andningsbesvär English: Difficulty breathing	
5	covidPortal	covidPortal	Swedish: Coronavirus English: Coronavirus	



Order The order that the search terms will be displayed in the Patient app.

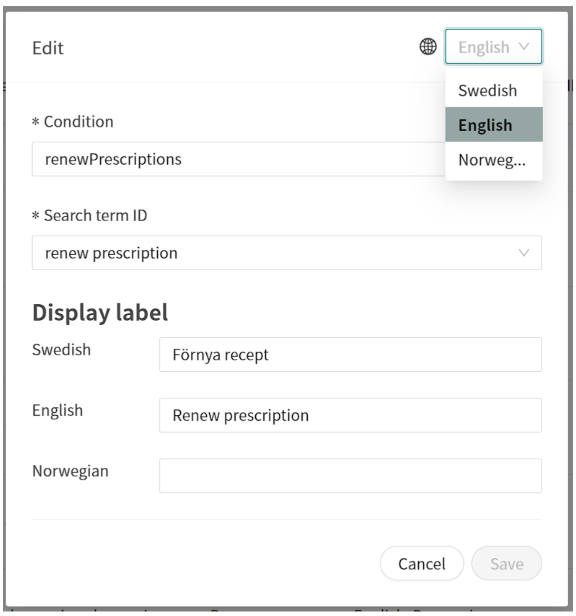
Condition The triage questionnaire the search term will lead the patient to.

Search term ID The ID of the search term as defined by the questionnaire in which the patient is entered. Only existing search terms in the questionnaires can be added to the common search terms.

Display label The text that will appear for the search term in the Patient app.

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

Click on the pen to edit the values for the **Common search terms**.



Actions	Clicking on the pen allows for editing of the search term. Clicking on the trash can deletes the search term.
Show search terms in app	For the **Common search terms** to be visible to patients in the Patient app, **Show search terms in app** needs to be activated. If this option was previously inactivated, Platform24 needs to approve the change before the terms are visible in the Patient app.

Editing common search terms

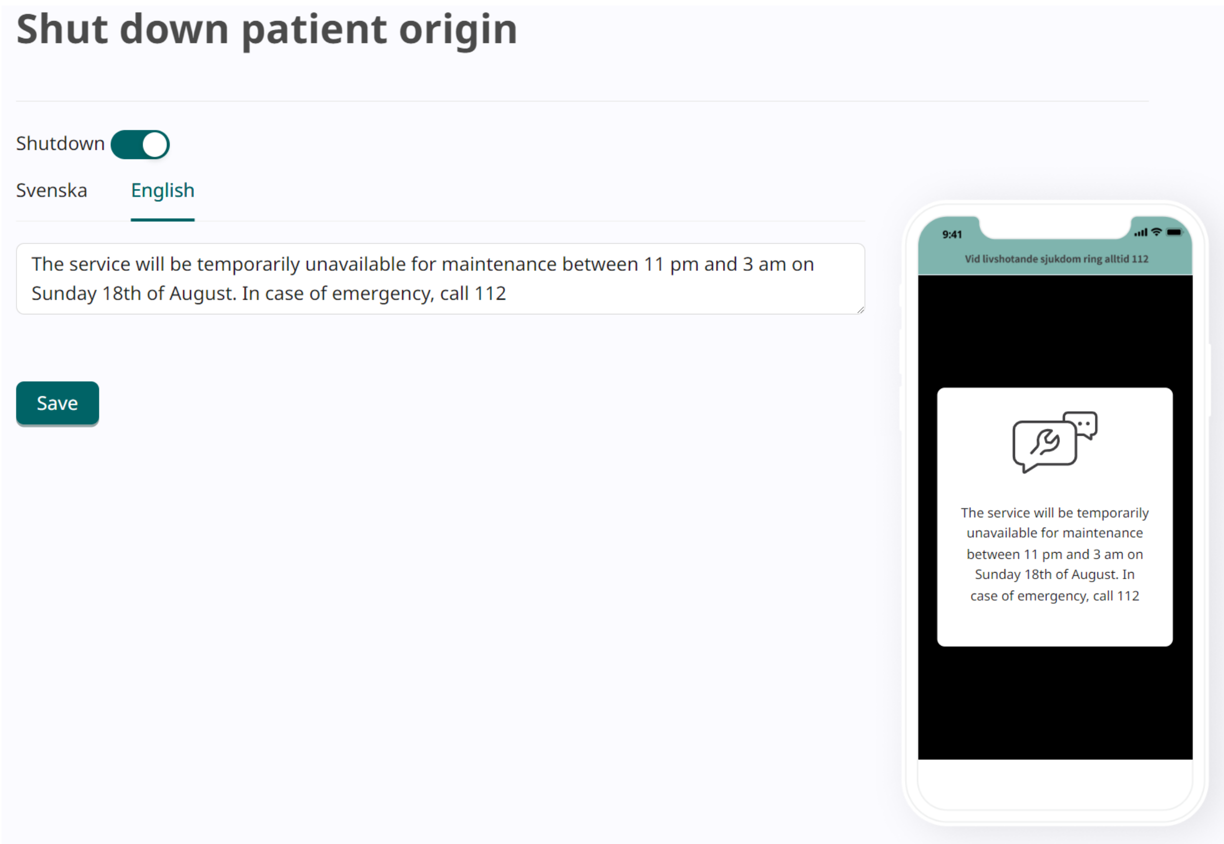
A set of default search terms are listed in the **Common search terms**. These can be deleted by clicking on the trash can, edited by clicking on the pen or the sorting order can be changed by clicking and dragging a search term to a different place in the list. You can also add a new term to the **Common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

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

10.2.5. Shut down Patient app

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

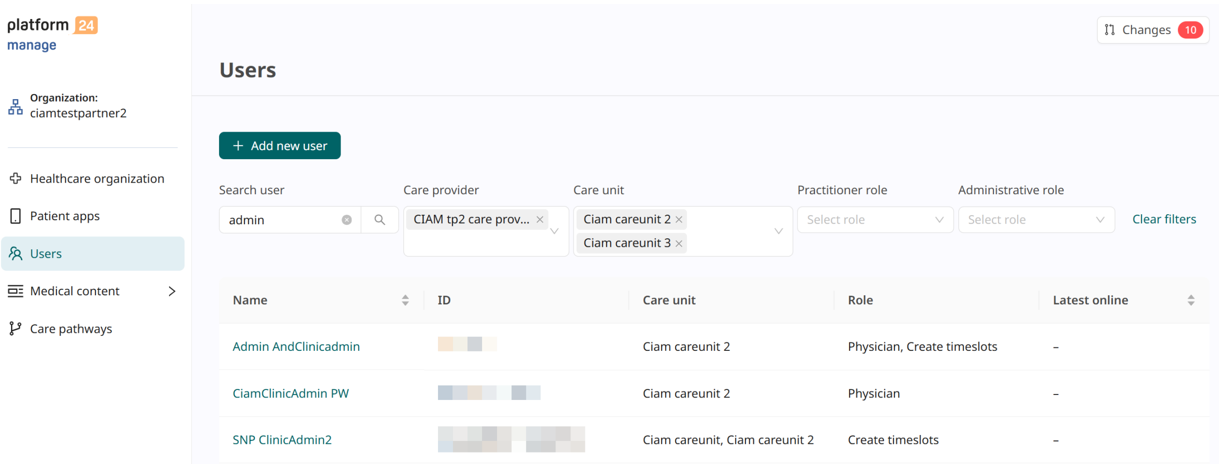
If a shutdown is required, it is recommended to add a message that will be displayed in the Patient app. Type the message in the message box, add translations in the corresponding tabs (if applicable) and click **Save**. The message will be displayed in a preview to the right in the user interface.



11. Administering users in Platform24

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

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



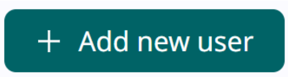
In the **Users** workspace, it is possible to search for users based on name, ID, or email address. Users can also be found by filtering on the following roles and permissions:

- **Care provider**
- **Care unit**
- **Practitioner role**
- **Administrative role**

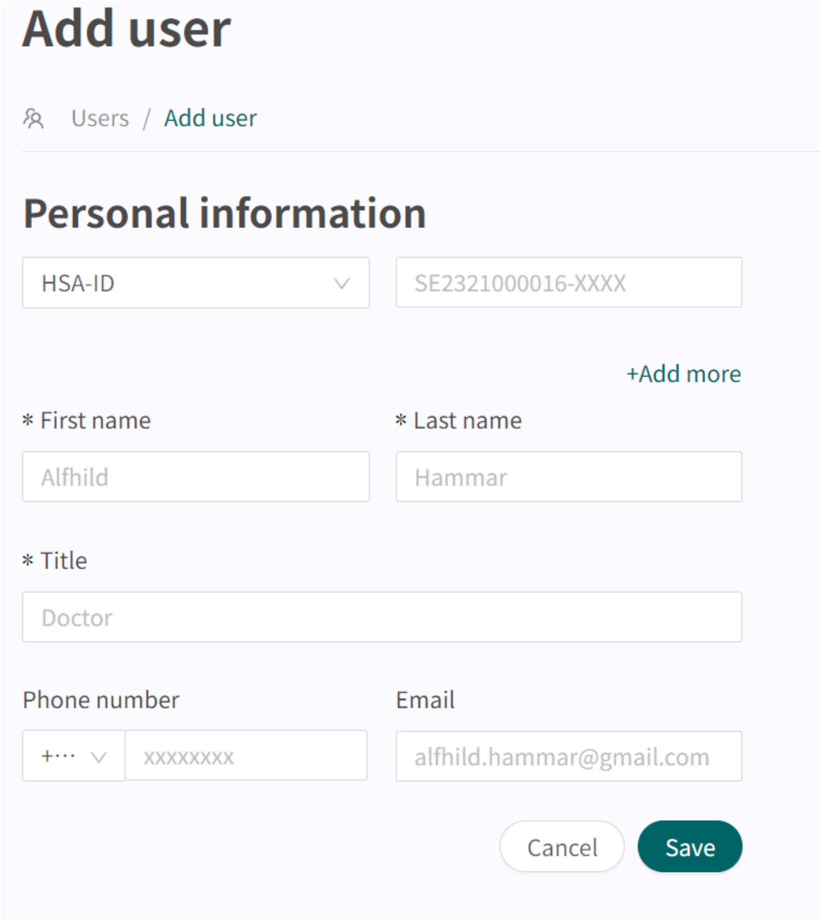
The higher up in the organization a user has *Clinic user administrator* permissions, the more capabilities that person has for administration and customization. For more information about the capabilities on various levels of the organization, see Clinic user administrator [62].

11.1. Add a new user

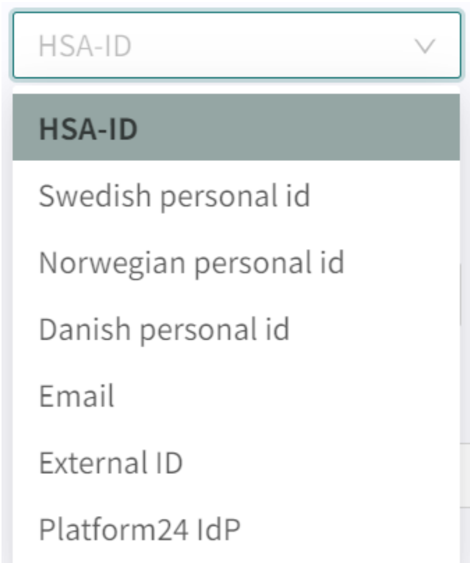
1. Click on the **+ Add new user** button at the top of the workspace.



This will redirect you to the **Add user** view.

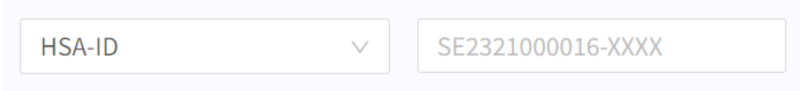


2. Select the type of ID to be used for login and fill in the login details.

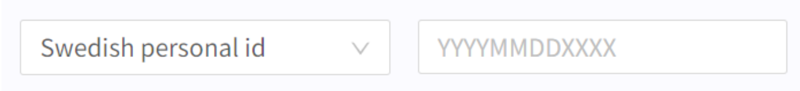


The type of ID depends on what authentication method is used by your organization/unit or country:

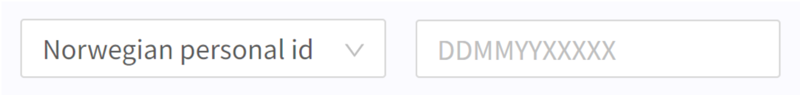
- **HSA-ID**
  Enter the complete HSA-ID number in the format *SE2321000016-XXXX*. It is not enough to fill in the last numbers, the entire HSA-ID number, including the hyphen, must be filled in. This also includes the country code at the start.



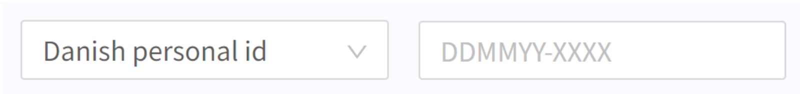
- **Swedish personal id**
  Enter the full Swedish personal number in the format *YYYYMMDDXXXX*, without a hyphen and using the full four numbers for the year.



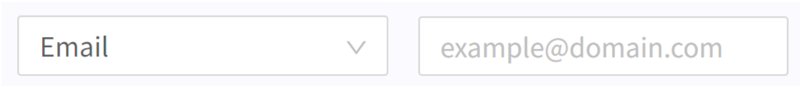
- **Norwegian personal id**
  Enter the full Norwegian personal number in the format *DDMMYYXXXXX*.



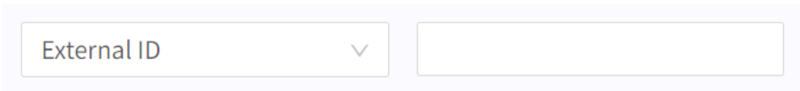
- **Danish personal id**
  Enter the full Danish personal number in the format *DDMMYY-XXXX*.



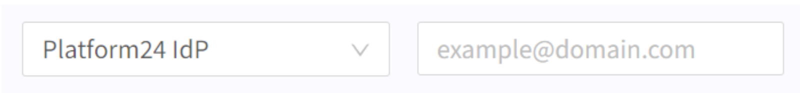
- **Email**
  Enter the email address in the format *example@domain.com*.



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



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



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

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

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

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

   > **NOTE**
   > First name, Last name and Title are mandatory information.
   >
   > This is how each practitioner/user is presented to the patients they receive in chat.

4. Click the **Save** Save button.

11.2. Roles and authorizations for users in Clinic

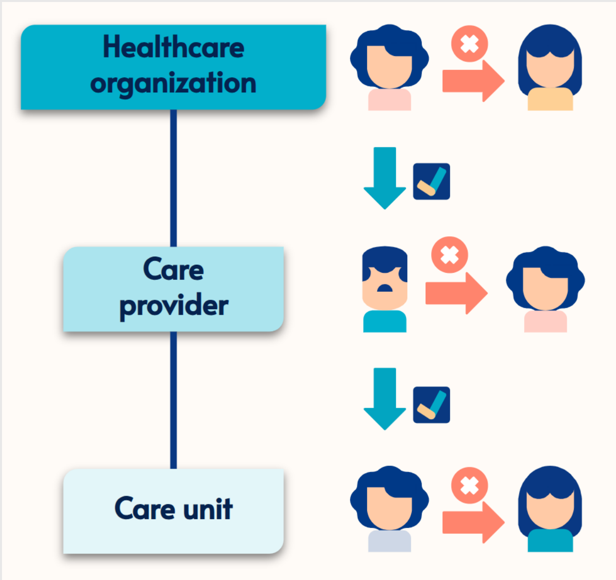
11.2.1. Appoint an administrator for the care provider

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

The Clinic user administrator role is an administrative Manage role, see Administrative Manage roles [61]. For instructions on how to assign a Manage role, see Assign a Manage role [63].

NOTE

A user can only assign roles to other users on an organization level lower than the the user's own organization level. The **healthcare organization** is the top level, followed by the **care provider** and then the **care unit**, see image.



For example, a user with access to the care provider can only assign another user access to a care unit, and not to the care provider.

If you need more users with authority to edit the healthcare organization, please contact Platform24 Support.

11.2.2. Appoint an administrator for the care unit

Each care unit needs to appoint one or more Clinic user administrators. For a list of the tasks an administrator at a care unit can perform, see Clinic user administrator [62].

11.2.3. Inform Platform24 about the appointed administrator

Inform your main contact at Platform24 (Product Success Manager or Customer Success Manager) in good time on who has been appointed administrator for the care provider.

Required information about the administrator user when informing Platform24:

- Name
- Email
- ID used for login. See section Add a new user [40].
- Care unit or care units the user is going to administrate

11.2.4. Before training and go-live

Prior to training sessions for users at a care unit, the administrator of the care unit needs to add the required authorizations to the Clinic users.

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

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

Contact your Platform24 Product Success Manager or Customer Success Manager if you are unsure about the production environment being ready to add user authorizations and phrases to it.

11.2.5. Authorizations for booking to another care unit

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

Notify your main contact at Platform24 (Product Success Manager or Customer Success Manager) about the users who need that authorization before the user training.

The following information is required:

- Name
- Title
- ID used for login. See section Add a new user [40].

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

> **NOTE**
> If an employee with the above authorization to book patients to other care units leaves, you must notify Support.

11.2.6. Adding authorizations

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

Authorizations can be added and modified for existing users. If you wish to add authorizations for a new user, you need to add the user to the system first (see Add a new user [40]).

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

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

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

Practitioner roles

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

Practitioner roles are defined by selecting a **Care unit** and a **Role**.

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

Role For each user, select the role that corresponds to the role that they will have towards the patients in the care unit. A user can only have one practitioner role per care unit. The appropriate role is based on the patient flow configurations within your health-care platform and care unit. It can for example correspond to the users professional title (nurse, physician etc.).

In case of doubt, contact your Platform24 Product Success Manager or Customer Success Manager.

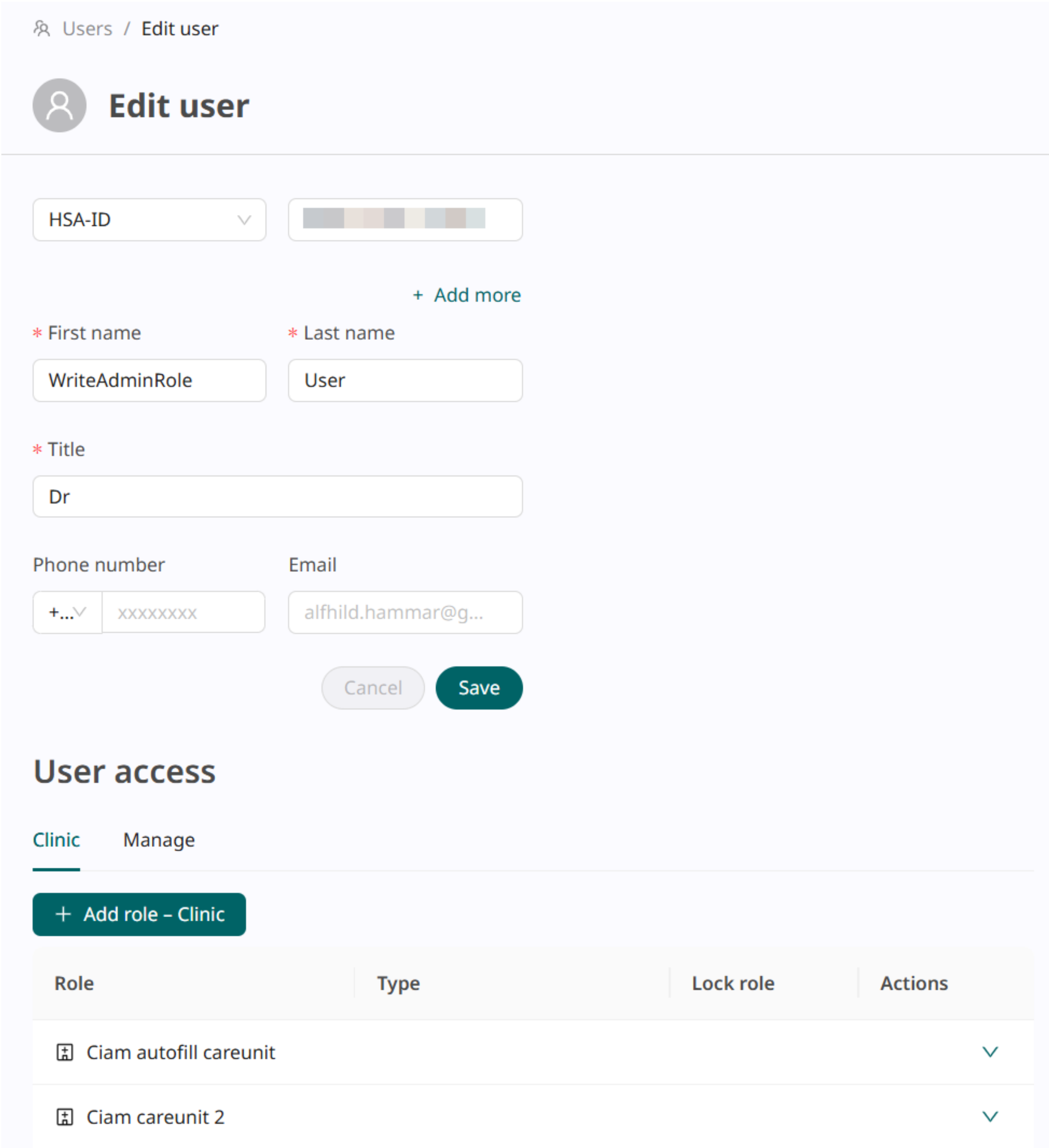
> **WARNING**
> It is important that users are assigned the correct Role. Users with the wrong Role can cause unwarranted patient risks.

A user may need authorizations for several care units, and may have a different roles at different care units. You will need to add practitioner roles for all the care units the user require authoriza-tion for (see add Practitioner roles [46]).

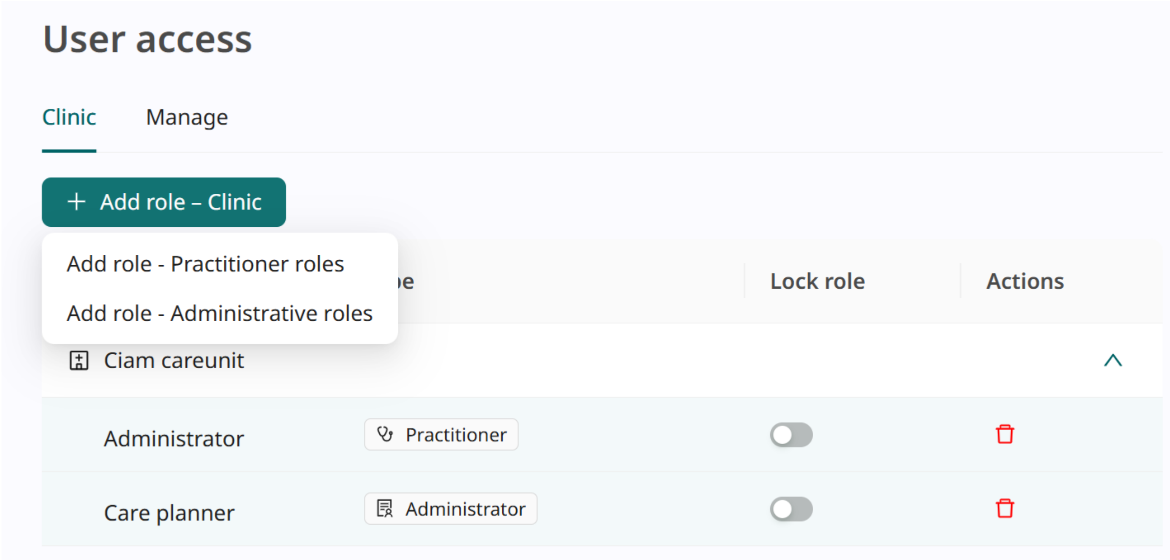
Assign a practitioner role

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

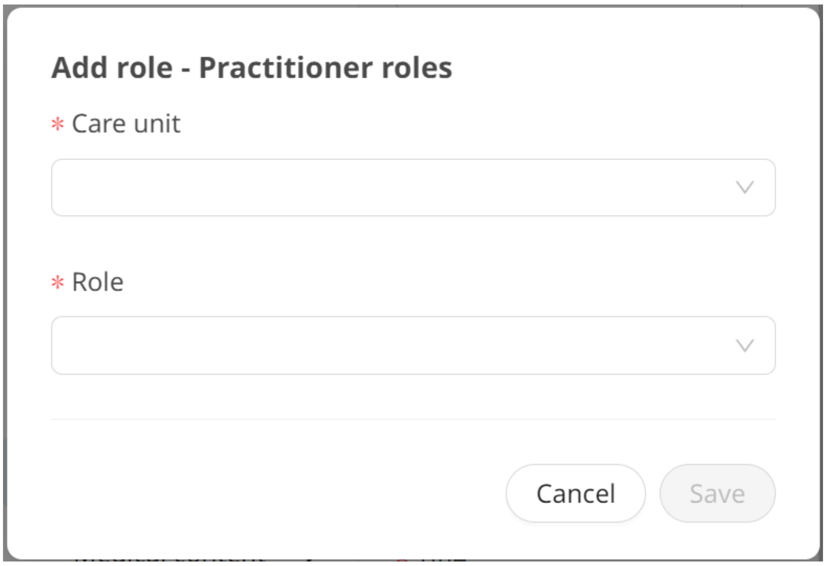
This opens the **Edit user** view.



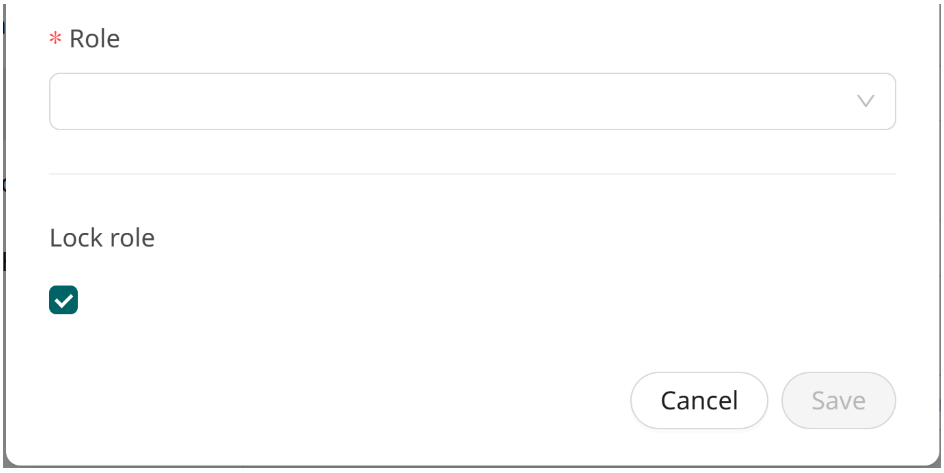
3. Make sure that the **Clinic** tab is selected. Click the **Add role** button and select the **Practitioner roles** option.



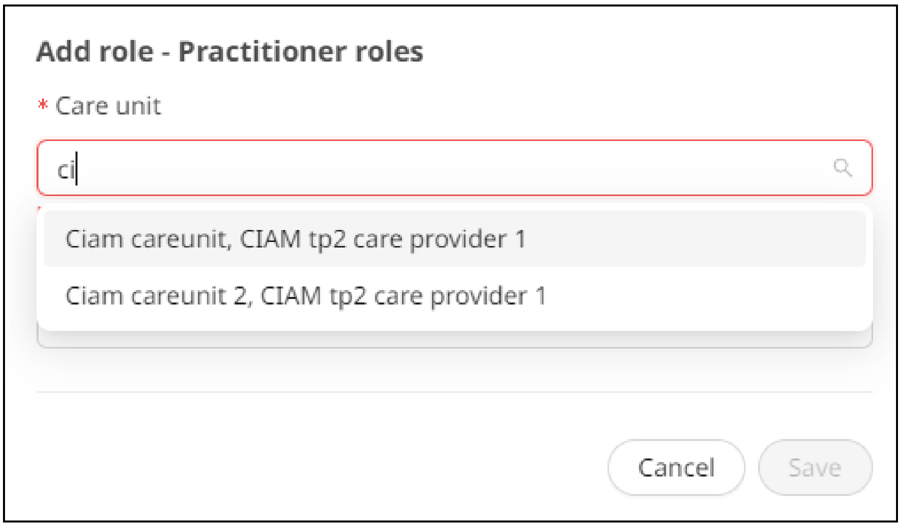
This opens the **Add role - Practitioner roles** dialog.



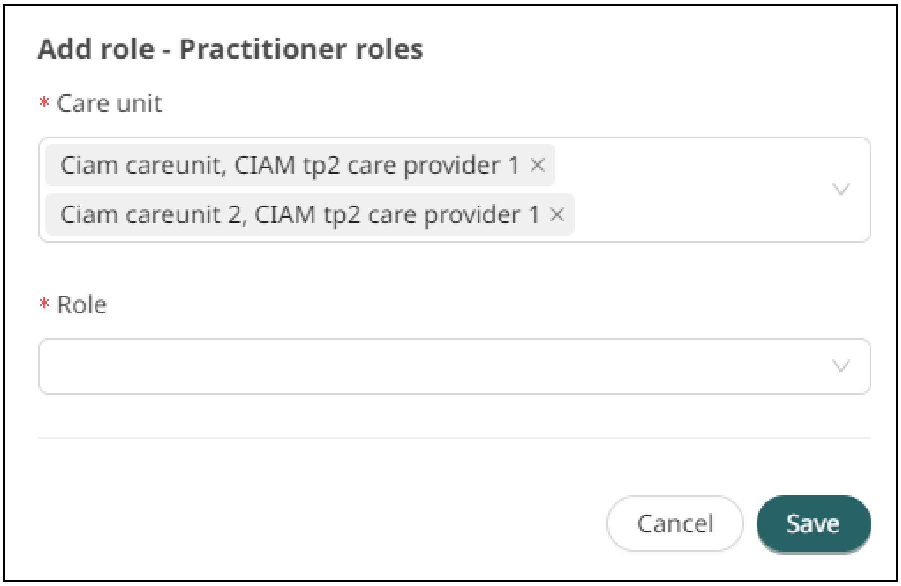
The **Lock role** functionality might be available in the dialog depending on your customer configuration. The **Lock role** functionality locks user roles from being overwritten when an update of the user roles is done during SSO authentication from another system.


* Role
Lock role
Cancel
Save

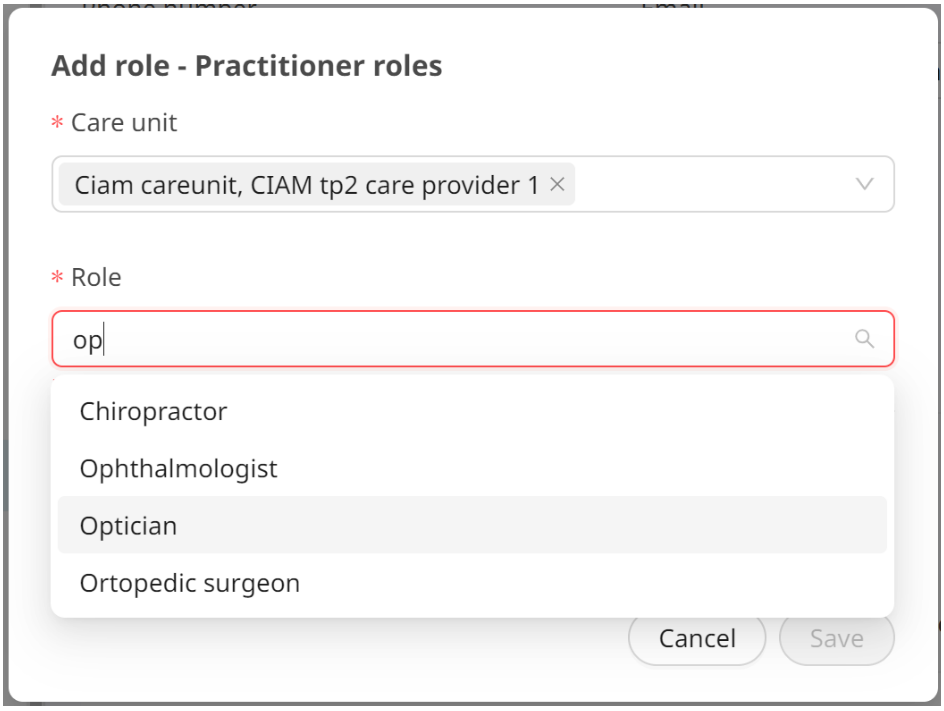
4. Select care unit:
   a. Click the **Care unit** field.
   b. Select a **Care unit** from the drop-down list.
   You can either scroll through the list or search for a care unit by typing in parts of the care unit name.



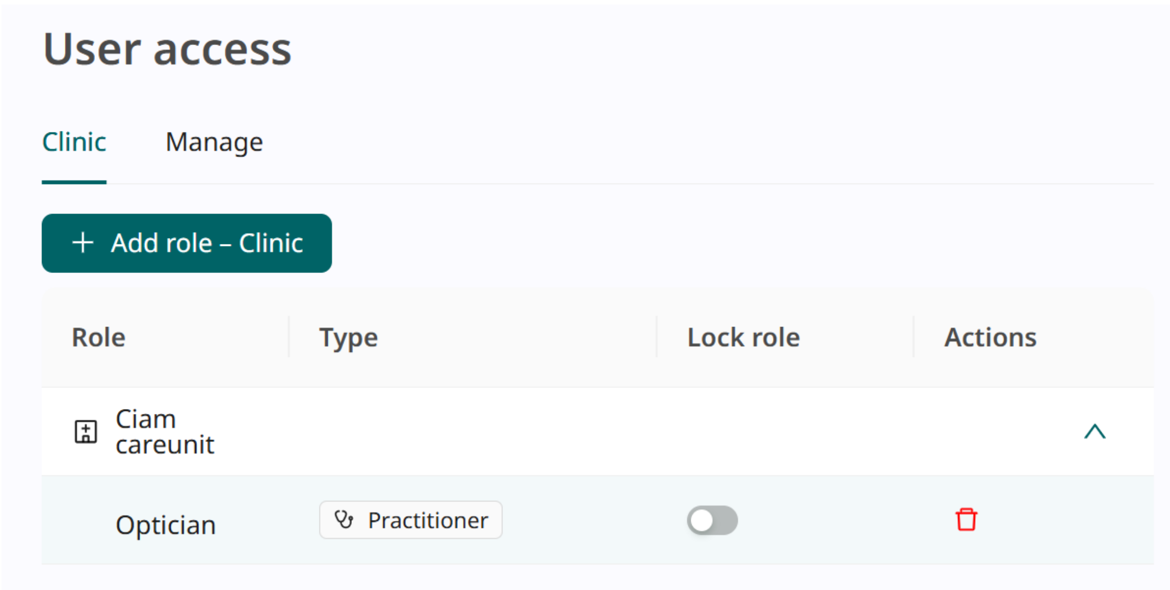
NOTE
If the user is to have the same role in more than one care unit, multiple care units can be selected at the same time.



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



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



Administrative roles

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

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

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

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

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

Administrator

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

Assess irregularities

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

Care planner

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

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

Cash registration

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

This function has been requested by costumers who want a central function for cash registration, so that not all individual care units have to handle the cash registration individually.

If your care unit is only to see visits within the care unit itself, the **Cash registration** role should **not** be assigned. The **Cash registration** role is used for those who have to cash register online visits to Clinic, often secretaries.

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

The units that cash register online visits in Clinic have received specific training in that function, so you should not assign someone that role if they have not been trained.

Create timeslots

The **Create timeslots** role is set on users that need to be able to create new bookable timeslots at the care unit specified in the **Care unit** field.

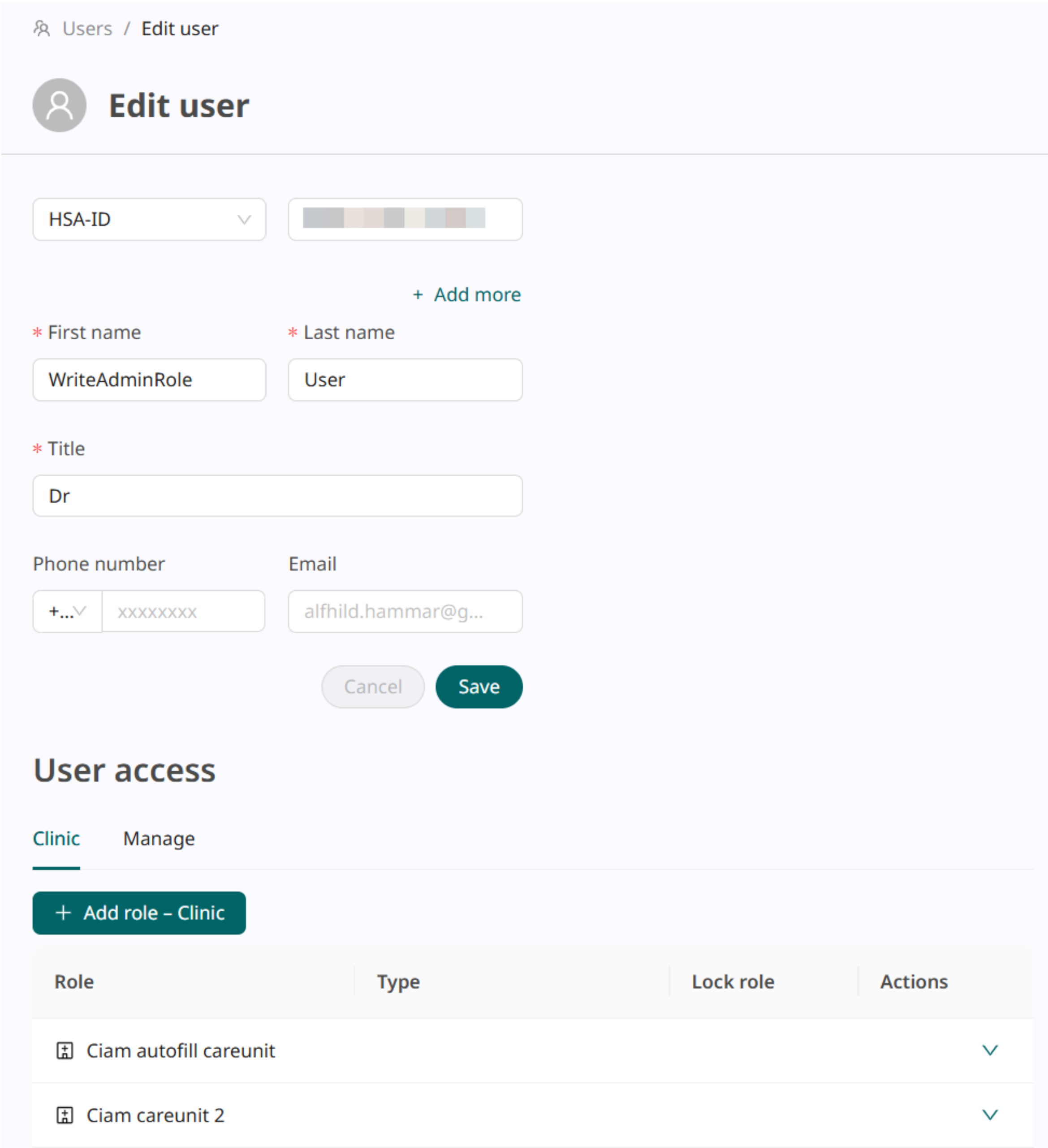
Schedule to

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

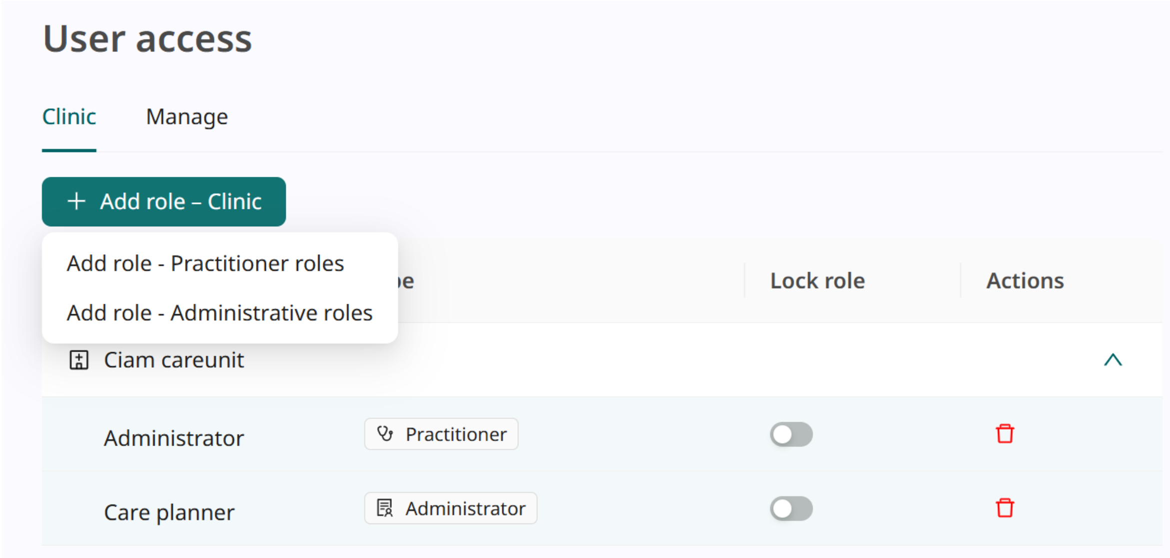
Assign an administrative role

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

This opens the **Edit user** view.

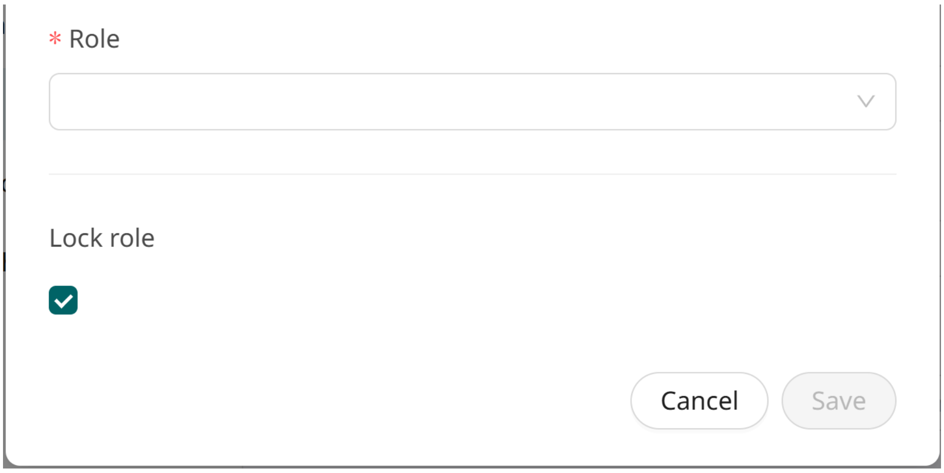


3. Make sure that the **Clinic** tab is selected. Click the **Add role** button and select the **Administrative roles** option.

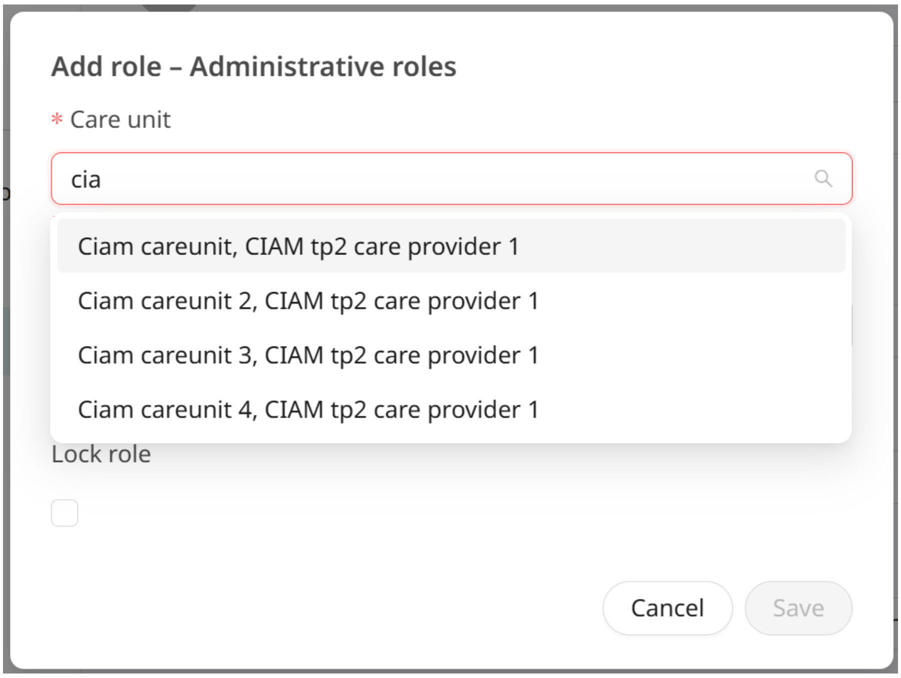


This opens the **Add role - Administrative roles** dialog.

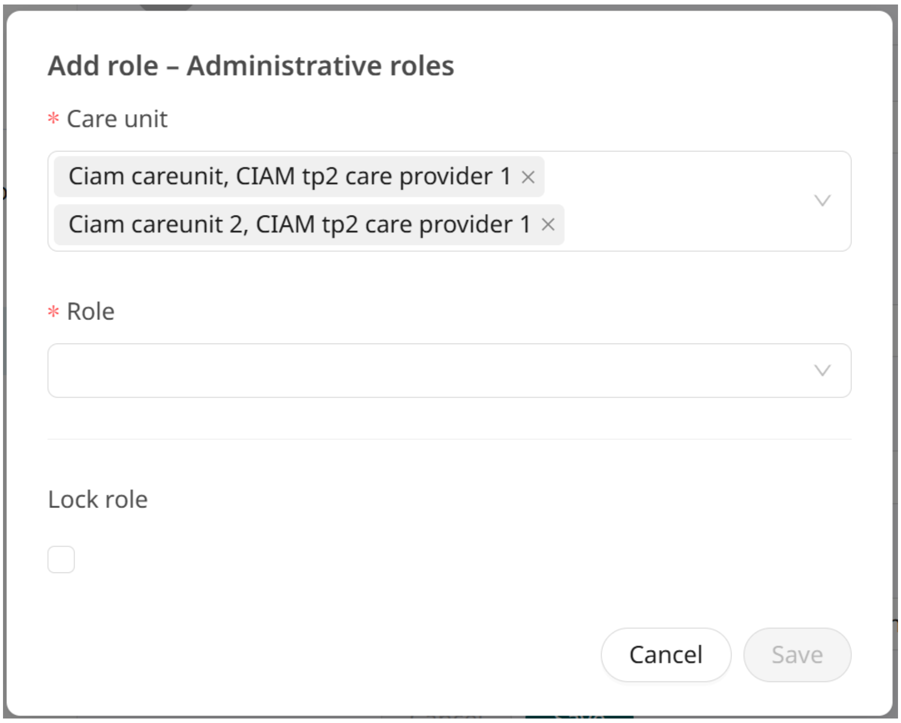
The **Lock role** functionality might be available in the dialog depending on your customer configuration. The **Lock role** functionality locks user roles from being overwritten when an update of the user roles is done during SSO authentication from another system.



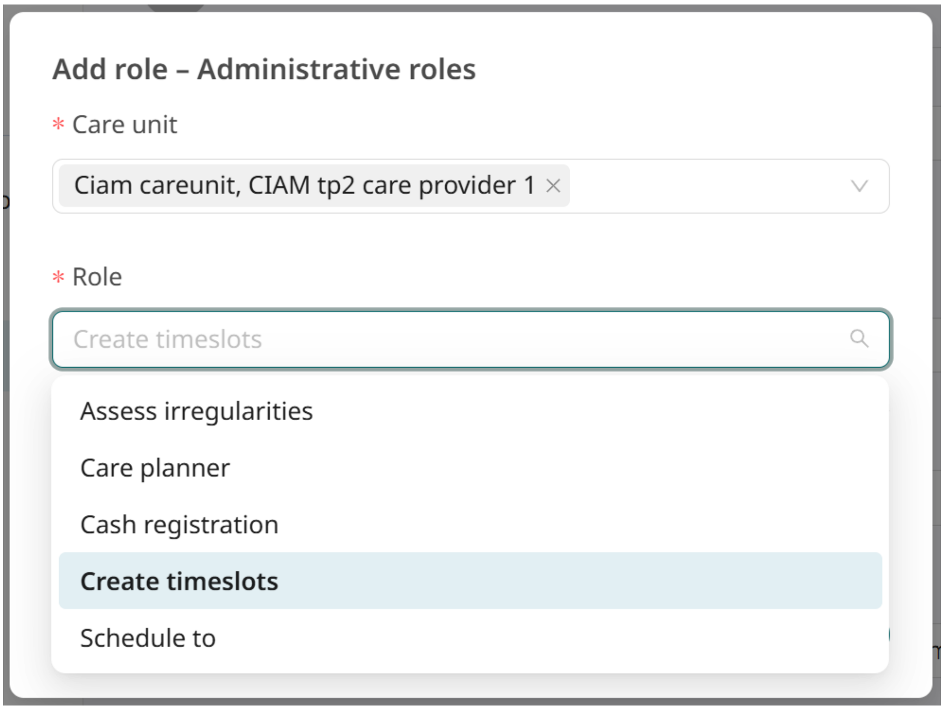
4. Select care unit:
   a. Click the **Care unit** field.
   b. Select a **Care unit** from the drop-down list.
   You can either scroll through the list or search for a care unit by typing in parts of the care unit name.



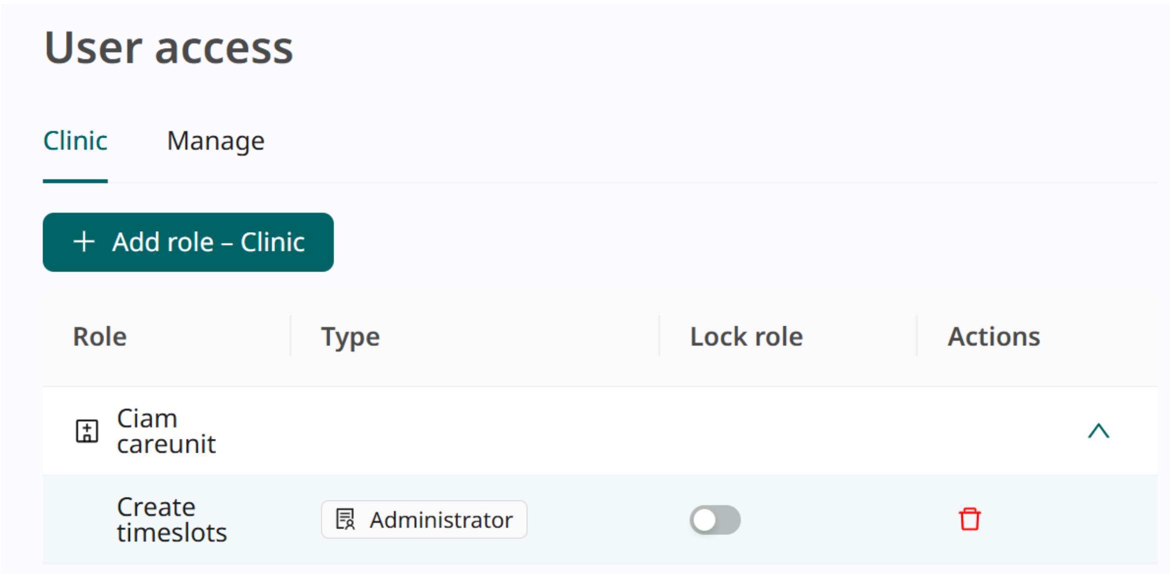
NOTE
If the user is to have the same role in more than one care unit, multiple care units can be selected at the same time.



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



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



Remove roles for a user

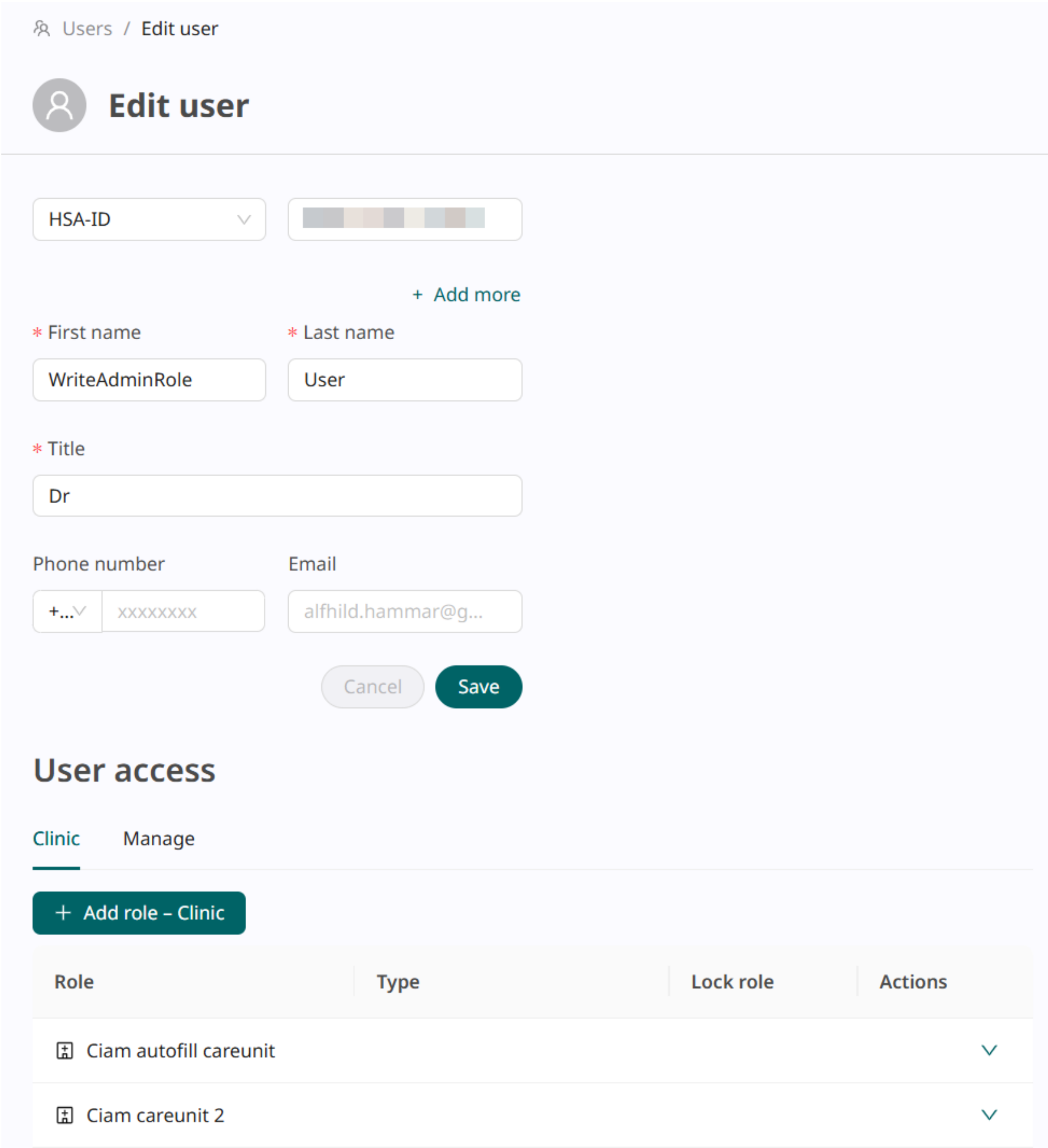
If a user quits a workplace, all roles from that user must be removed. This means that the user can no longer log in, but the personal information is saved. This saved data is used to, among other things, track visit history and logs.

To remove roles for a user:

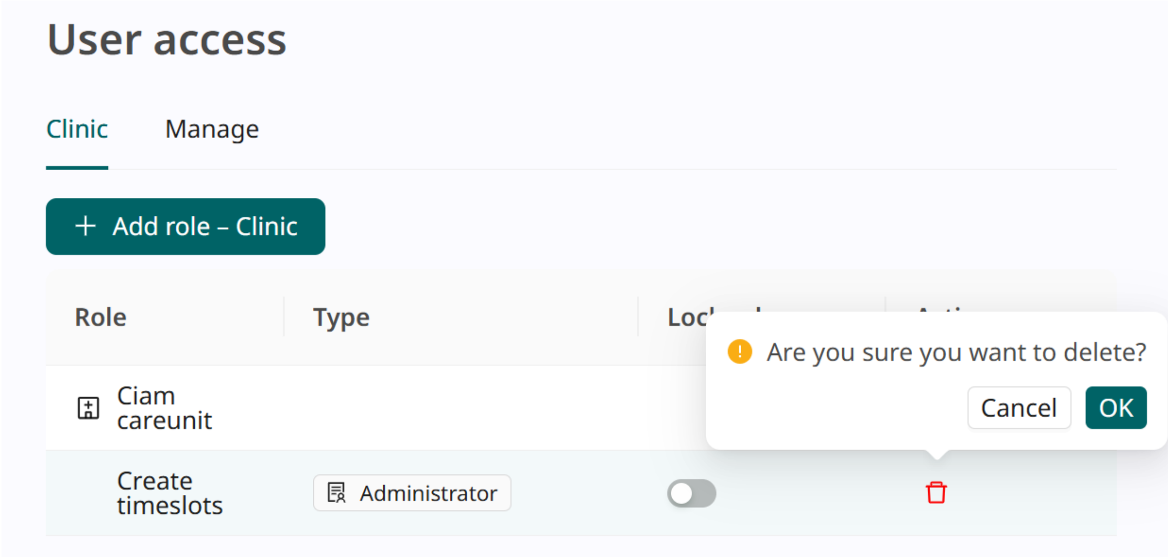
1. Go to the **Users** menu item in the main menu.

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

This opens the **Edit user** view.



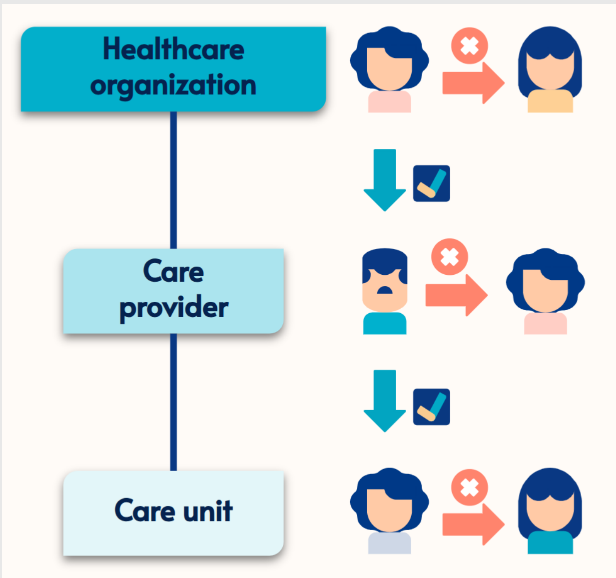
3. Make sure that the **Clinic** tab is selected. Remove the desired roles by clicking the trash can icon in the **Actions** column for the respective roles.



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

11.3. Roles and authorizations for users in Manage

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

> **NOTE**
>
> A user can only assign roles to other users on an organization level lower than the the user's own organization level. The **healthcare organization** is the top level, followed by the **care provider** and then the **care unit**, see image.
>
> 
>
>
> For example, a user with access to the care provider can only assign another user access to a care unit, and not to the care provider.

If you need more users with authority to edit the healthcare organization, please contact Platform24 Support.

11.3.1. Administrative Manage roles

Configuration administrator	With this role, the user can access and edit configurations for care units or for Patient apps.
Clinic user administrator	With this role, the user can add and update user information and assign practitioner and administrative roles in Clinic. For more information about roles and authorizations for users in Clinic, see Roles and authorizations for users in Clinic [43].

Configuration administrator – Care unit

This is a role for managing/configuring care providers and care units within the healthcare organization, as well as managing other configuration administrators. It is possible to be a configuration administrator for several individual care providers or for several individual care units at the same time.

Depending on what organizational level the role is assigned on, the permissions vary. The higher up in the organization a user has administrator permissions, the more capabilities that person has for administration and customization.

With this role for an entire healthcare organization, you have permissions to:

- Administer the overall configuration for the healthcare organization
- Assign the *Configuration administrator* role to administrators for individual care providers within the organization
- Perform all tasks that a configuration administrator at the care provider level can carry out (see below) for all care providers within the entire organization

With this role for a specific care provider, you have permissions to:

- Administer the overall configuration for the care provider
- Assign the *Configuration administrator* role to administrators for individual care units within the care provider
- Perform all tasks that a configuration administrator at the care unit level can carry out (see below) for all care units within the care provider

With this role for a specific care unit, you have permissions to:

- Administer configuration for the care unit:
  - Manage the unit’s phrases
  - Edit care unit details, such as address
  - Add a general announcement for the care unit that is displayed in Clinic

Configuration administrator – Patient app

This is a role for managing/configuring the healthcare organization’s Patient apps, as well as managing other configuration administrators.

Depending on what organizational level the role is assigned on, the permissions vary. The higher up in the organization a user has administrator permissions, the more capabilities that person has for administration and customization.

With this role for an entire healthcare organization, you have permissions to:

- Assign the *Configuration administrator* role to administrators for individual Patient apps within the organization
- Perform all tasks that a configuration administrator at the Patient app level can carry out (see below) for all Patient apps within the entire organization

With this role for a specific Patient app, you have permissions to:

- Edit certain texts in the Patient app. Note that this does not include menu items.
- Modify texts in SMS and email notifications linked to the Patient app
- Edit “Common search terms”, i.e., the reasons for seeking care that are highlighted for the patient in a "Seek care" flow
- Add a general announcement for patients in the Patient app
- Temporarily shut down the Patient app

Clinic user administrator

This is a role for managing healthcare staff working in the healthcare organization, as well as managing other Clinic user administrators. It is possible to be a Clinic user administrator for several individual care providers, or for several individual care units at the same time.

Depending on what organizational level the role is assigned on, the permissions vary. The higher up in the organization a user has administrator permissions, the more capabilities that person has for administration and customization.

With this role for an entire healthcare organization, you have permissions to:

- Assign the *Clinic user administrator* role to administrators for individual care providers within the organization
- Perform all tasks that a Clinic user administrator at the care provider level can carry out (see below) for all care providers within the entire organization

With this role for a specific care provider, you have permissions to:

- Assign the *Clinic user administrator* role to administrators for individual care units within the care provider
- Perform all tasks that a Clinic user administrator at the care unit level can carry out (see below) for all care units within the care provider

With this role for a specific care unit, you have permissions to:

- Add new users (healthcare staff) to the platform

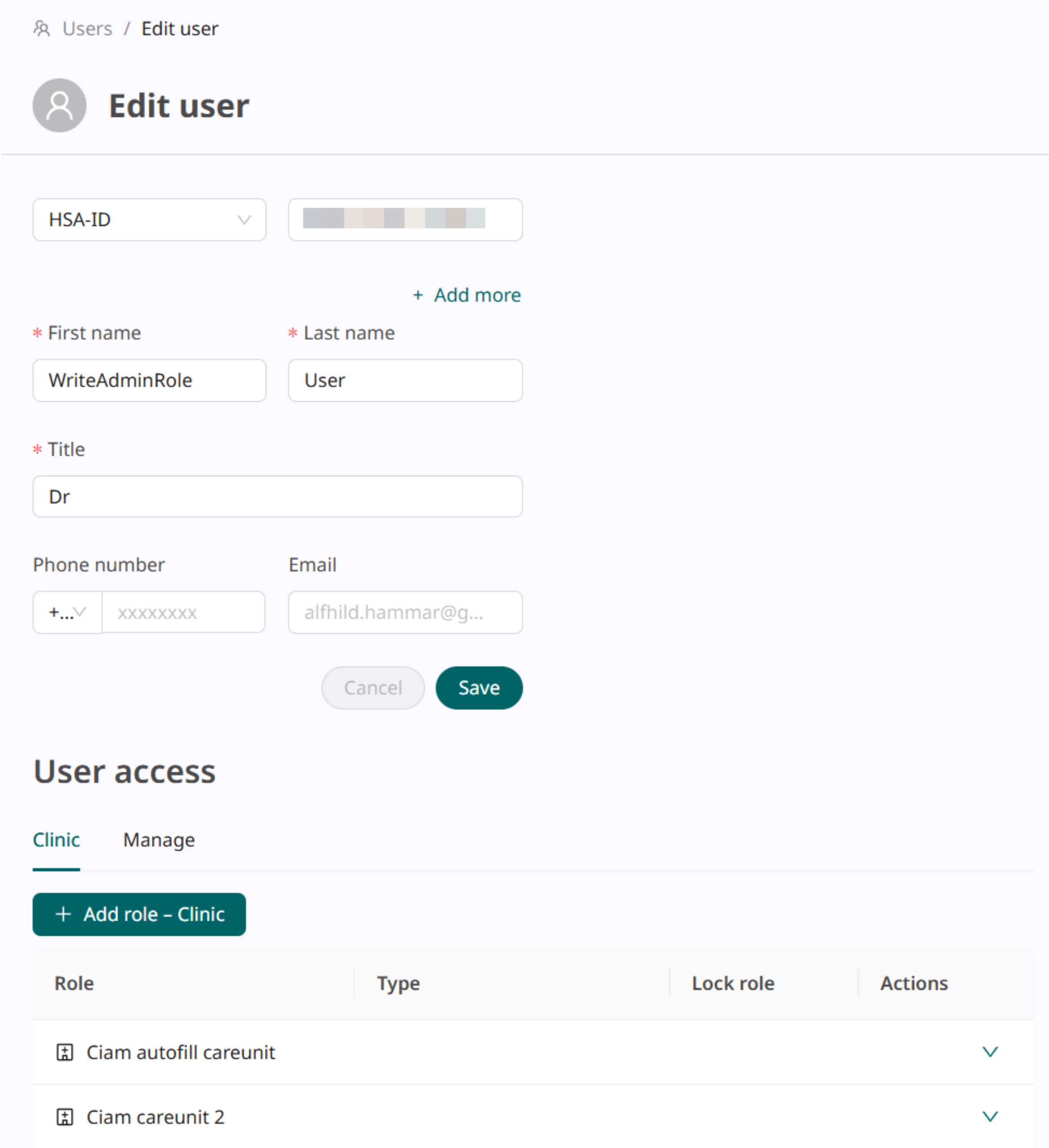
> **NOTE**
> It is recommended that the Clinic user administrator does not provide more permissions than the user needs to be able to work in the platform. If you are unsure of which permissions to use for a specific user, ask your main contact at Platform24 (Product Success Manager or Customer Success Manager).

- Grant permissions by assigning practitioner roles (such as *Nurse*, *Physiotherapist*) and administrative roles (such as *Create timeslots*, *Schedule to*) to the healthcare staff who will be working at the care unit in Platform24
- Remove permissions for healthcare staff who no longer work at the care unit in Platform24

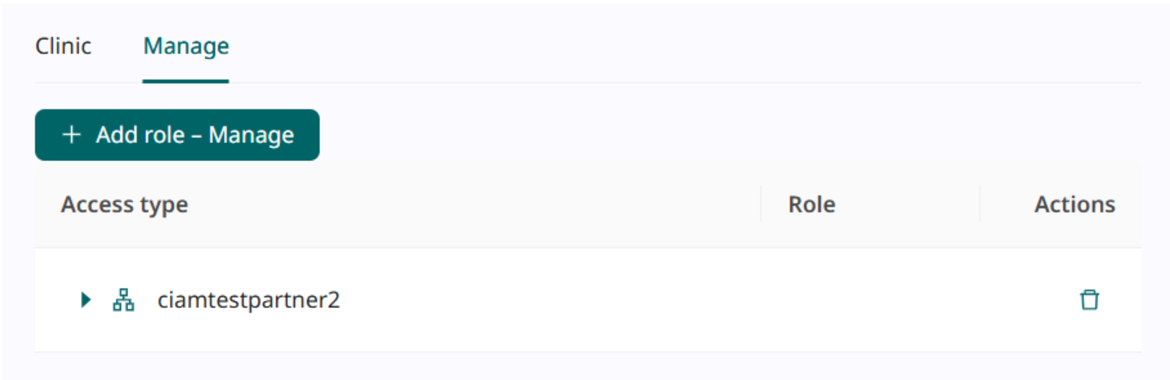
11.3.2. Assign a Manage role

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

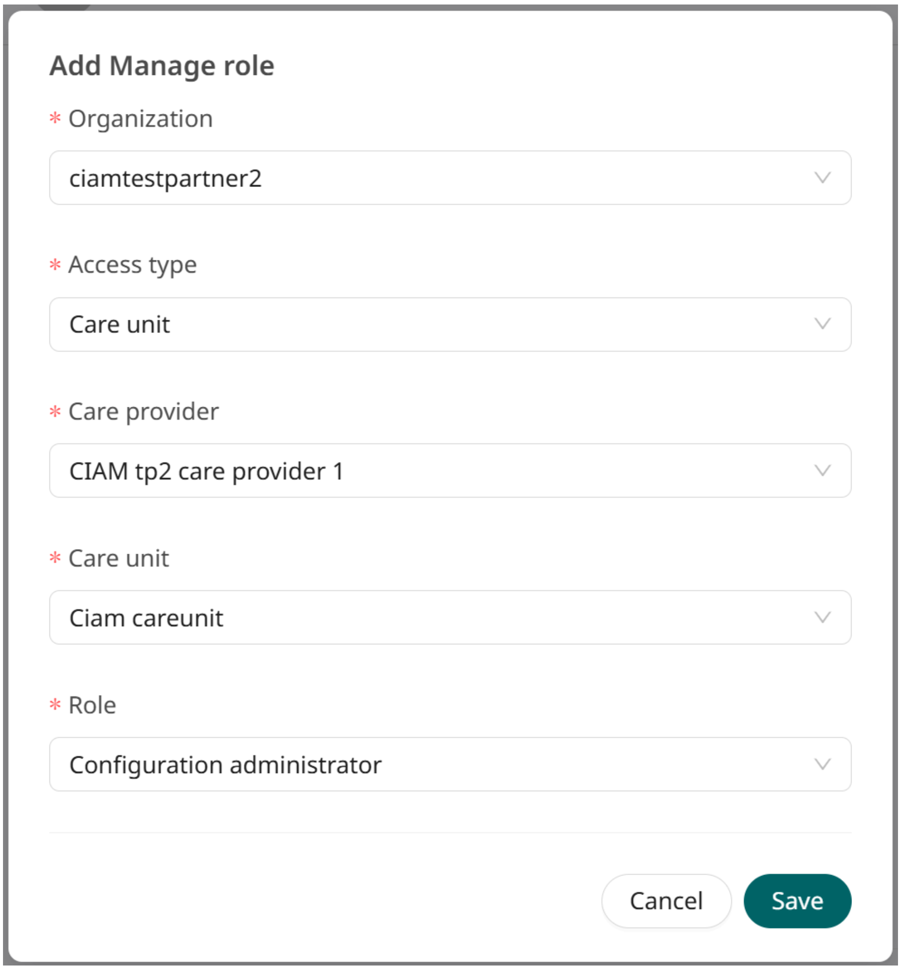
This opens the **Edit user** view.



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

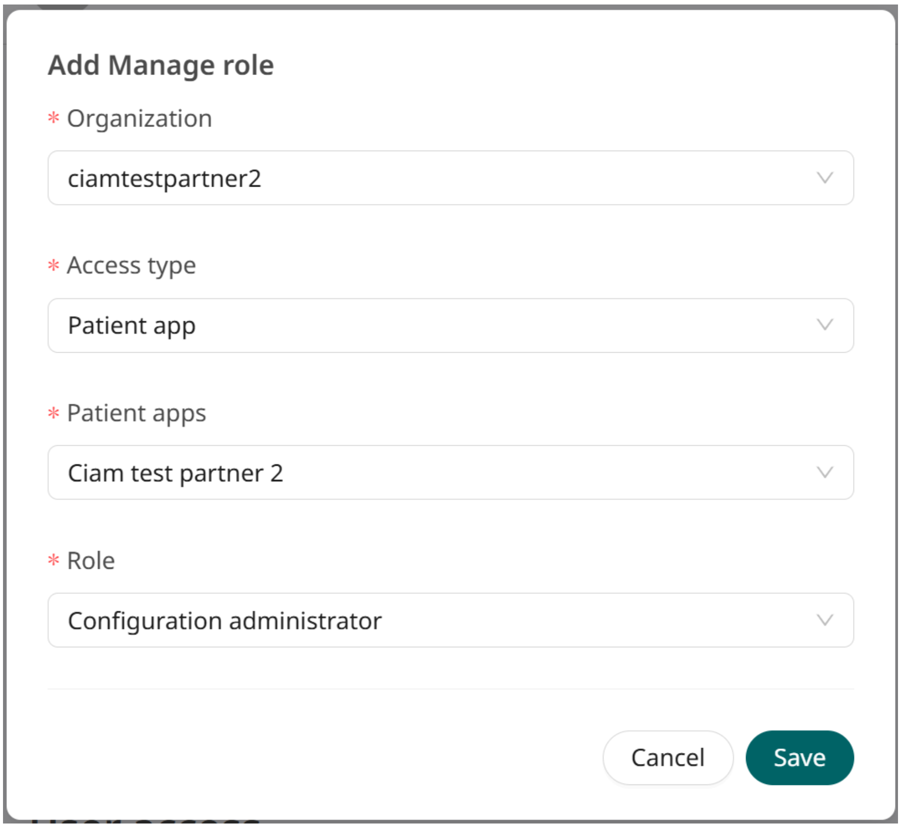


4. If the role should be added to make configurations for Clinic:
   a. Select **Organization** from the drop-down list.



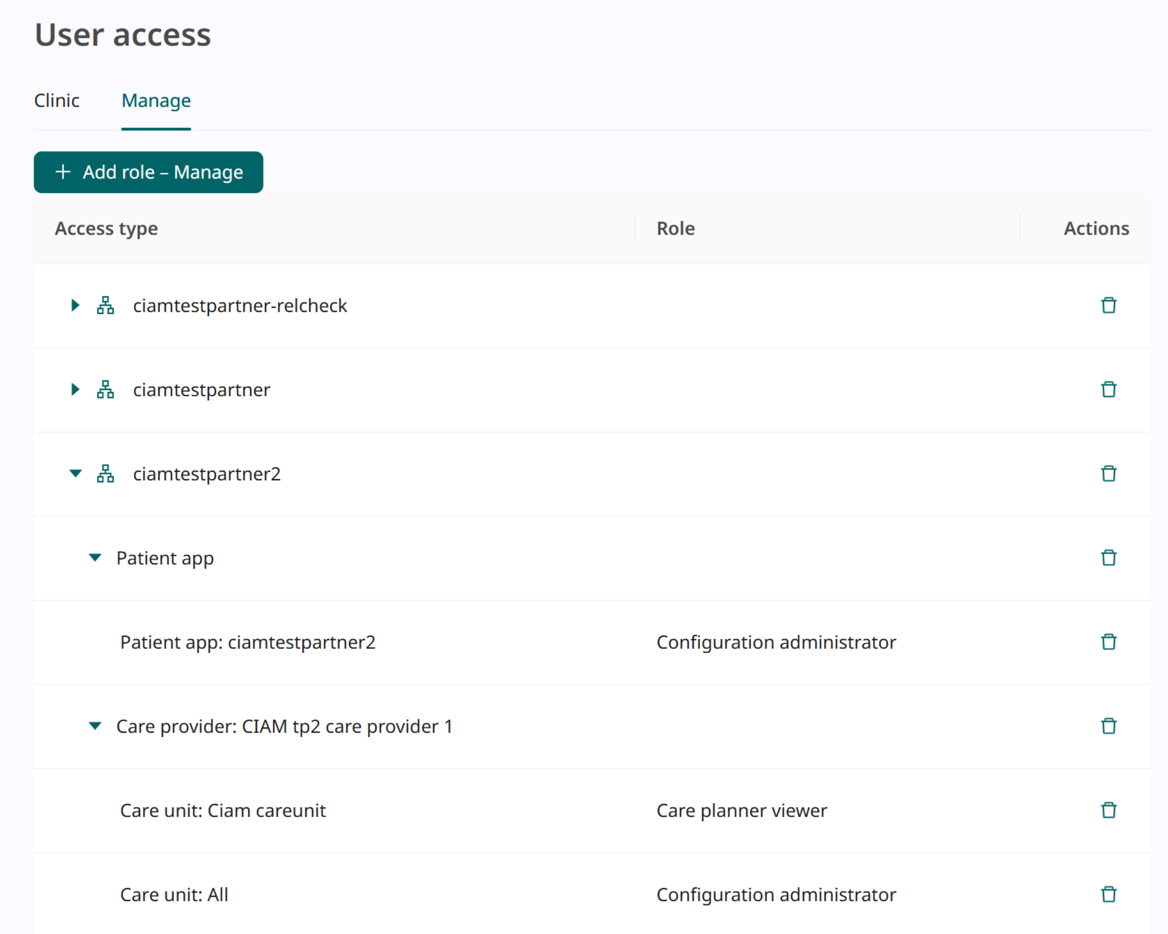
   b. Select "Care unit" in the **Access type** drop-down list.
   c. Select **Care provider**, **Care unit** and **Role** from the respective drop-down lists.

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



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

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



11.3.3. Specialized Manage roles

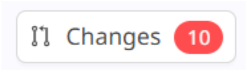
There are specialized roles for additional functionality, see below.

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

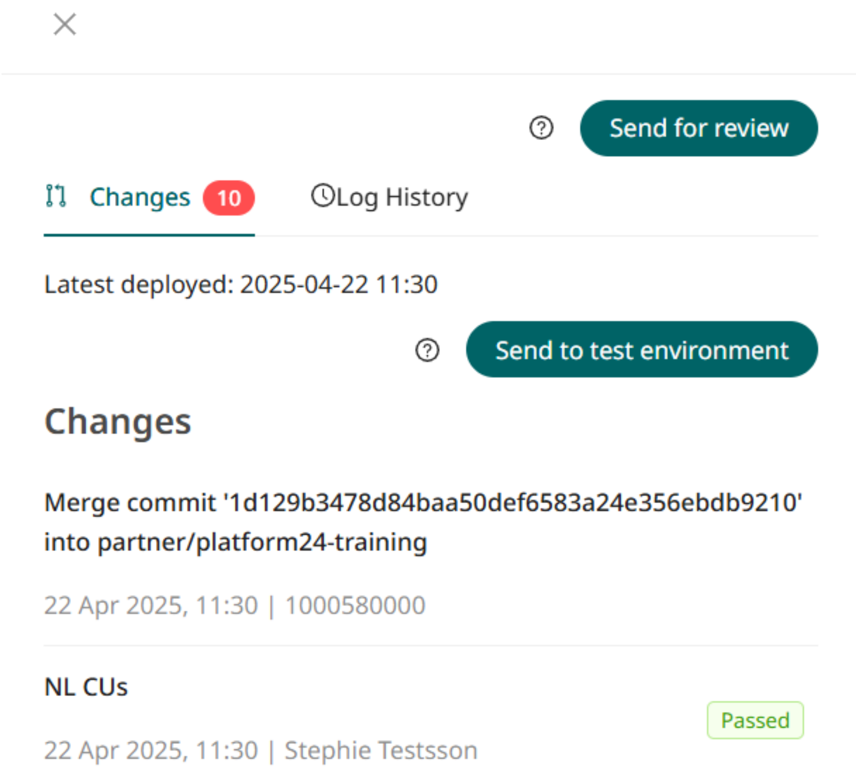
12. Change management and tracking

To get traceability for changes made in Manage, all changes are saved with information about who made the change, when the change was made and what the change included. If there is a production deployment ongoing, it will be listed in the top right corner, and no further changes can be made until the production deployment has been completed.

To view all changes, click on the **Changes** button in the top right corner.



This will expand the **Changes** and **Log history** lists.

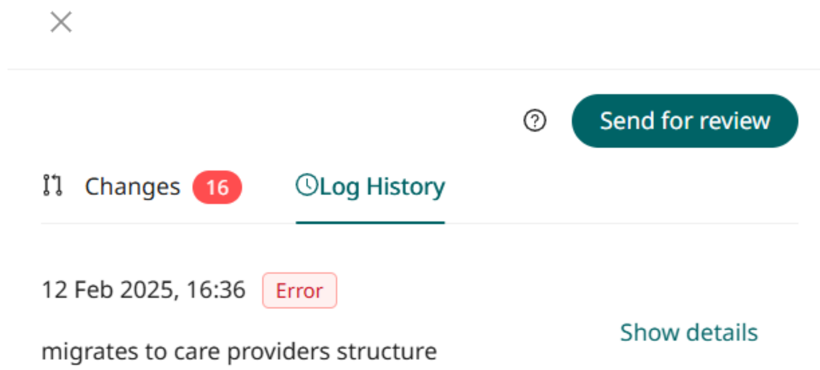


Changes

Any changes made since the last production release will be displayed in the **Changes** list. The list displays what the change was, who made the change, date and time and whether the change has been saved correctly. The number of changes is displayed and listed in the red circle. The most recent changes are given a status that informs if the changes have "`Passed`" or "`Failed`". It is always the most recent change that is valid (displayed at the top). If the top one has passed, all the underlying ones have also been saved correctly. If "`Failed`" is displayed for the three most recent changes, contact your Platform24 Product Success Manager, Customer Success Manager or Support for further help.

Log history

Information about previous production releases is available in the **Log history** list. The log history shows a status of whether the production release was successful or not. More information about what the production release involves is available under **Show details**.



Send to test environment

In order for changes in Content Studio/Manage to be updated in the demo application for the Patient app and Clinic (demo/test environment), the changes must be actively uploaded.

When the **Send to test environment** button is green (located in the **Changes** tab), there are new changes that can be sent out to the demo environment. All changes that have been added since the last update to the demo environment will be sent out when clicking the **Send to test environment** button. All updates that are listed under a change with “Passed” status have been successfully uploaded to the test environment.

If the **Send to test environment** button is gray, there are no new updates to upload to the test environment.

Send for review

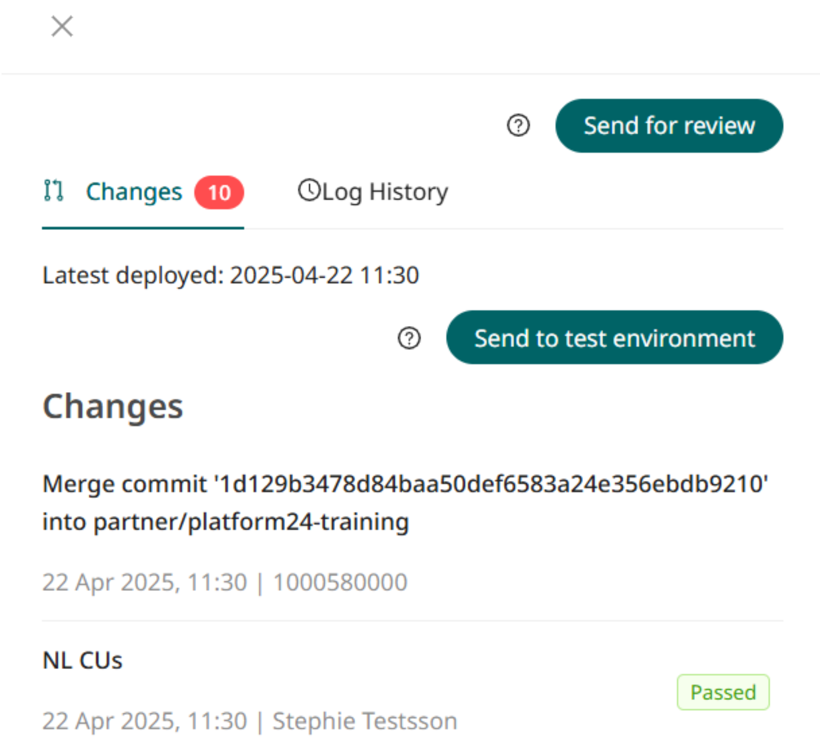
In addition to the customer's own validation- and test processes in the demo environment, a technical review by Platform24 is required before the changes are released into production. For more information, see Sending changes for technical review before release to production [70].

13. Sending changes for technical review before release to production

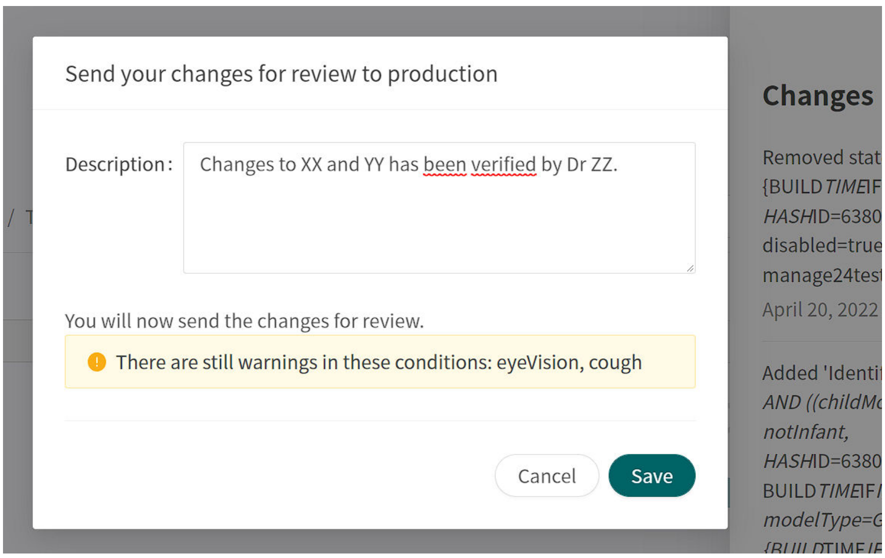
In addition to the customer's own validation- and test processes in the demo environment, a technical review by Platform24 is required before the changes are released into production. Once the technical review has been completed, the changes are released into production.

To send the changes for technical review before release to production:

1. Click on the **Send for review** button.

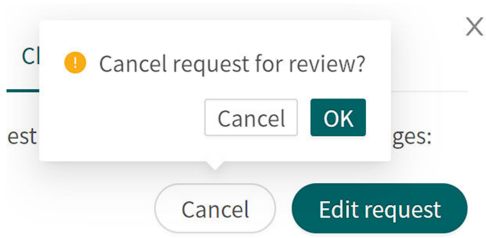


2. Describe what changes have been made and the required impact of the changes.

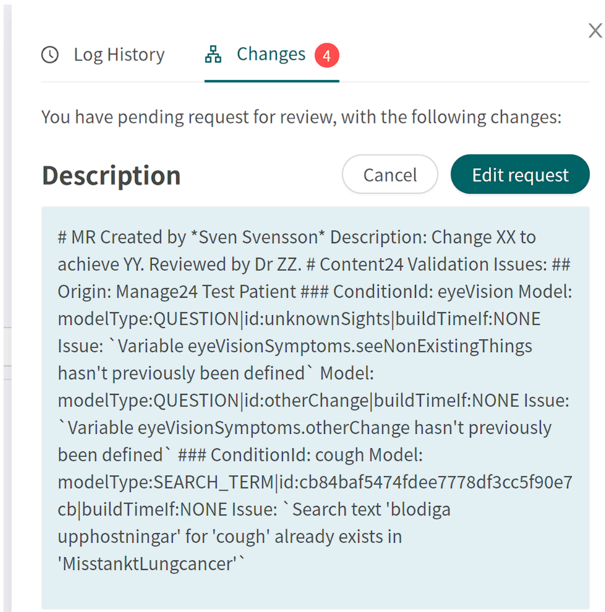


3. Click **Save** to send the request.
   When the technical review has been completed and it has passed, the changes will be released to production.

You can cancel the sent request by clicking **Cancel**, if for example a review of additional changes needs to be carried out.



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



14. Versions

#	Date	Description
1.0	2021-03-01	Extended the quick reference guide into a user guide.
2.0	2021-09-10	Format updated. Front page, color schemes, formatting of warnings. The user guide replaced with a user manual.
3.0	2022-05-30	Transfer into Paligo and making English the source language. Some content changes in the following areas: • minor grammar and spelling fixes • fixes to solve re-use issues in Paligo • clarifications of the login process • renamed topic/chapter Basic information/Working in Manage24 to "Manage24 uses" due to duplicate chapter names.
4.0	2022-10-31	CE-marking changes after Triage24 certification. .se changed to .com in contact information. Updated image in the Adding a new practitioner section. Corrected typos.
5.0	2023-03-02	Changed manual name from Manage24 User Manual to Manage User Manual. New images of the user interface with Platform24 logotype. Duplicate image removed in Section 5.3. Login to Manage24. Non-applicable sentence removed in active mode Warning.
6.0	2023-10-27	Main updates are: • Manage24 changed to Manage, Clinic24 to Clinic and Content24 to Content Studio. • Non-applicable symbols removed from page 2 and Chapter 2. • In chapter 3 and section 11.2.1: Caution regarding not to assign more roles than necessary per user removed as the information already is in a warning. • In chapter 3: reference to PDL (Swedish Patient Data Act) removed from a warning. • Referring to superuser instead of Customer Success Manager in section *5.3 Log in to Manage*. • Information in sections 6.1 and 6.2 updated. • In section 11.2.3: description of the Assess irregularities role added, and roles Super Admin and System Admin removed. • Note removed from section 11.2.6. • Changed name of chapter 13 to References.

#	Date	Description
7.0	2024-04-03	Main updates are: • General: Practitioners heading in the main menu updated to Users in text and images. • General: Images improved (main menu cropped so that the other content is more visible). • Information in previous abstract moved to Chapter 1. Note added in this chapter about UI components and user manuals. • Support email address updated for user manuals in Chapter 2. • Previous Chapter *5 What is Manage* moved in as a section in Chapter *6 About Manage*. • Chapter 6 renamed. Information from Chapter 6 moved in to new section *6.1 Main menu* to be more visible. Information also added about menu items that previously were not described. • Chapter 9 improved and expanded to include more options in the Type of ID selection. • Updates to section *9.1 Add a new user*: It is now possible to change a user's personal information in Manage after a user has been added. Therefore, the Important-note that this is not possible has been removed. • Sections *11.2.2 Add a practitioner role*, *11.2.4, Add an administrative role*, *11.2.5 Updating a role to be primary for a user*, *11.2.6 Remove roles for a user* updated to describe the new way of adding and editing roles in Clinic. • Previous section *11.2.5 Administrative roles* removed as this information already is included in the new instructions in Chapter 12.

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

#	Date	Description
9.0	2025-08-07	Main updates are: • General: Images and related content updated throughout the manual to reflect user interface changes, including new names in menu items and settings pages. For example, "Origin" has been renamed to "Patient apps", "Care units" to "Healthcare organization" and "Partner" to "Organization". The redesigned interface for editing settings for a care provider, care unit and Patient app is also described. • General: The manual has been restructured, with some sections moved into separate chapters. For example, the sections "Change management and tracking" and "Sending changes for technical review before release to production" are now separate chapters. Chapters reorganized to reflect the order of the items in the main menu. Information about how to log in and out of Manage moved to a separate chapter for better visibility. • General: The term "Toplist" has been renamed to "Common search terms". References to "Implementation manager" replaced with references to "Product Success Manager or Customer Success Manager". • Address to manufacturer updated on page 2 and in section *2.1. Manufacturer*. • Information about National Medical Information System (NMI) added on page 2 (Sweden only), along with associated regulatory symbols and information. • Chapter *3. Symbols definition* expanded to also contain a definition of the precautions in the User Manuals. • Warnings: Redundant warning about testing changes removed as this information is already covered in other warnings. "Should" updated to "shall" in one warning. • Rewritten sections/chapters: *1.1. About this manual*, *6.1. What is Manage?*, *6.2. Manage functionality*, *8. Main menu*, *10.2. Editing settings for Patient apps*, *10.2.4. Common search terms*, *11. Administering users in Platform24*, *11.2.1. Appoint an administrator for the care provider*, *11.3. Roles and authorizations for users in Manage* and *12. Change management and tracking*. • New sections/chapters: *1.2. Hardware and software specifications*, *5. Intended use Platform24*, *8.1. Your Manage profile*, *9.1. Announcements*, *9.2. Care provider settings*, *9.2.1. Announcements for the care provider*, *9.3. Care unit settings*, *9.3.2. Announcements for individual care units* and *13. Sending changes for technical review before release to production*. • Chapter *9. Configurations and settings for care units in Clinic* updated and renamed to *Configurations and settings for the healthcare organization in Clinic*. • The "Rules" sub-section removed from section *10.2. Editing settings for Patient apps* and section *11.1.5. Booking tickets for other care units* removed. • Previous section *Autophrases* merged with section *9.3.3. Phrases*. Section *9.3.3. Phrases* has also been expanded with sub-sections that describes how to create a phrase category and how to add and edit links in phrases. • Section *10.2.2. Alerts* updated with instructions on how to set a time window for when the alert will be shown in the Patient app. An example of how the alert looks in the Patient app has also been added.

#	Date	Description
		• Section *11.1. Available Manage roles* split into two sections: *11.3.1. Administrative Manage roles* and *11.3.3. Specialized Manage roles*. Specialized roles not in use have been removed. • The following sub-sections have been added to section *11.3.1. Administrative Manage roles*: *Configuration administrator – Care unit*, *Configuration administrator – Patient app* and *Clinic user administrator*. These sub-sections describe the administrative permissions a user has at the different levels within the organization. • Chapter *15. References* updated.

15. References

Title	Description
Content Studio+ User Manual	This manual covers the management of the medical content used in the Triage24 product. The user interface for editing the medical content is Manage.
Content Studio User Manual	This manual covers the management of non-routing questionnaires in Manage.
Smart Care Plans Studio User Manual	This manual covers how to create templates for care pathways used in the Smart Care Plans product. The templates are created in Manage and used to automate and connect care activities for planned episodic care.