ENGLISH

platform24

Instructions for Use – Clinic

Manual version 8.0
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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 Clinic

Clinic is the user interface used by healthcare professionals to communicate with patients and conduct digital patient visits.

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.

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1. Introduction

1.1. About this manual

This is the instructions for use for Clinic (the practitioner user interface).



NOTE

The instructions for use 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 instructions for use. 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 instructions for use.

1.2. Hardware and software specifications Clinic/Manage

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 instructions for use

For feedback and questions regarding the instructions for use, email the support email below.

E-mail: <support@platform24.com>

3. Definition of symbols and precautions

3.1. Symbols definition

This section describes the symbols that are found on the About page of the user interfaces and in the instructions for use.



Version number



Consult instructions for use



Indicates that caution is necessary when operating the device



Date of manufacture



Manufacturer

3.2. Precautions definition

This section describes the different types of precautions that are used in the instructions for use.



WARNING
A warning indicates a hazardous situation that, if not avoided, could result in death or serious 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. Intended use Platform24

4.1. Product name

Platform24 system

4.2. 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.

4.3. Intended user profile

4.3.1. Intended users

Healthcare practitioners

Practitioners use the system to communicate with patients and manage patient information.

Details

Type of user	Professional
Age	>20 years
Level of instructions	• Licensed practitioner, e.g., medical doctor, nurse, psychologist • Level *C1-C2* in the language supported in the product for the relevant market • Instructions for use
Interface	Clinic (web)

Patients

Patients use the system to communicate with their healthcare provider.

Details

Type of user	Layman
Age	• 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.
Level of instructions	• Level *B1-B2* in the language supported in the product for the relevant market
Interface	Patient (app/web)

Administrators

Healthcare provider staff authorized to configure the system to the healthcare provider's needs.

Details

Type of user	Professional
Age	>20 years
Level of instructions	• Undergone education and training • Instructions for use • Level *C1-C2* in the language supported in the product by the care provider
Interface	Manage (web)

4.4. 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 healthcare 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 practitioners usually run 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.

The administrators access Platform24 through a web interface. The administrators usually run 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.

4.5. 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
3. Patients with cognitive issues that are able to use technology, but unable to use it correctly (including but not limited to dementia or severe mental retardation)

5. Summary

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

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

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

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

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

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

6. Working Methodology

6.1. Overview

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

6.2. Read up prior to a patient visit

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

If the patient has been booked for an online visit by healthcare practitioners, the triage/medical history details will not be displayed in the medical history window for your visit. In Clinic, you can then access any booking details under the medical history window.



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

6.3. At the end of each session

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

6.4. Child patients

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

7. Log in and log out

7.1. Log in to Clinic

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

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

> **IMPORTANT**
> Clinic lacks support to be used via Citrix VPN. If your computer is connected to the Internet via Citrix VPN, for example to allow you to remotely access your regular medical record system, you need to ensure that you log in and work in Clinic in a separate web browser window outside the current Citrix VPN session. Please note that all communication and data in Clinic is always handled in a secure and legally compliant manner.

2. Log in using your selected authentication method.

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

7.2. Log out of Clinic

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



8. Data security

8.1. Overview

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

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

Never leave your computer unattended with your login activated.



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

8.2. Recommendations

Our recommendations to further ensure data security:

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

9. Shift type

9.1. Overview

There are different shift types to customize the user experience. The shift type is preselected, but it can be changed by clicking on your name on the left when you're signed in to Clinic. Also refer to Your profile [101]

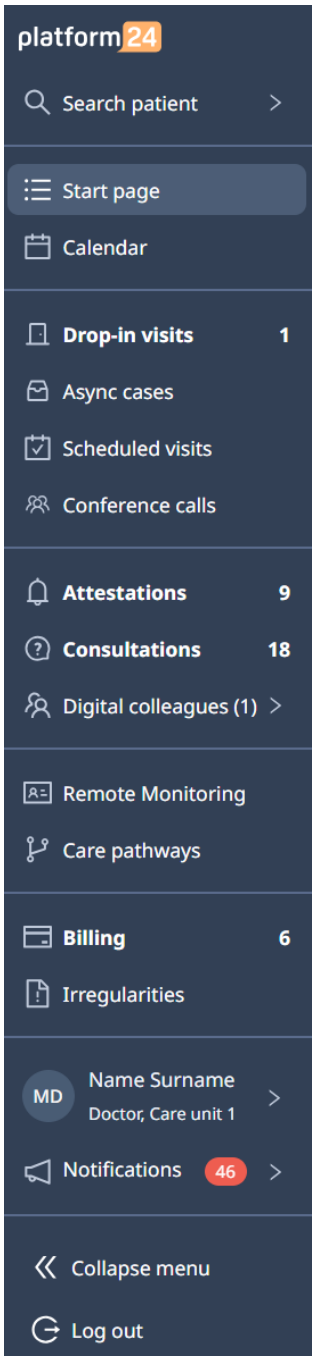
If the system loses contact with your browser, e.g., due to a slow internet connection, you close the tab, the computer goes into sleep mode or if there are technical errors, your shift will be paused after 30 minutes (does not apply to the *Scheduled* shift type). This means that you will no longer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

9.2. Different shift types

Drop-in (Primary line):	The main task is to receive drop-in patients. The **My Current** filter will show new patients in the queue, visits with new asynchronous messages, ongoing synchronous visits that you have started, as well as upcoming scheduled visits in the next 30 minutes for *Your role*. You can choose to receive notifications for new patients in the queue as well as for new asynchronous messages.
Scheduled:	The main task is to receive patients with an appointment. The **Today** filter displays scheduled visits within the current 24-hour period. This includes patients who are booked to you, as well as patients who are not assigned to any specific resource except for *Your role*. This ensures a better overview and daily planning. Your shift will not end automatically if you are logged in with shift type **Scheduled**.
Drop-in (Secondary line):	The main task is to assist the **Drop-in (Primary line)**, but you can also work as **Drop-in (Primary line)**, with two important differences: • **Drop-in (Secondary line)** staff receive certain notifications that **Drop-in (Primary line)** staff do not; when there is a long queue or when there are no **Drop-in (Primary line)** staff logged on. • Notifications are sent on the condition that the user has registered their mobile number in Clinic.
None:	If you log into the system without planning to receive new patients. You will not be visible under **Digital colleagues**.

10. Main menu

The main menu can be viewed on the left-hand side when you are logged in to Clinic. This menu allows you to navigate to different pages where you can perform various types of tasks and access different types information.



10.1. Main menu items

Below is a summary of the main menu items:

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

Search patient

Here you can search for a patient, schedule a digital visit or send an asynchronous message. You can also register a new patient. For more information, see Search patient [19].

Start page

Here you find the old patient list that contains all upcoming, ongoing and finished digital patient visits. This page contains both drop-in and scheduled visits as well as completed asynchronous cases from patients.

> **NOTE**
> This page will eventually be removed and replaced with a new and improved start page. We recommend you not to work in this page but instead to use the new list pages *Drop-in visits*, *Scheduled visits* and *Async cases*.

Calendar

Here you find the calendar where you can view and manage bookable visits for scheduled digital visits. For more information, see Calendar [26].

Drop-in visits

In this view, incoming patients in a drop-in care unit are managed. You can also view drop-in visits that are being transferred to another colleague, role or care unit. For more information, see Drop-in visits [50].

Async cases

An asynchronous case is a way to communicate with the patient outside of an ongoing (synchronous) visit. In this view, you find new and ongoing asynchronous cases – both with and without unhandled/unread messages – as well as closed asynchronous cases. For more information, see Asynchronous cases [56].

Scheduled visits

Here you find upcoming, ongoing, and completed scheduled visits of type *Scheduled* and *Video appointment*. For more information, see Scheduled visits [54].

Conference calls

In this view you can manage conference calls with several patients, practitioners and/or external guests as participants. For more information, see Conference calls [62].

Attestations

Attestations are tasks created either automatically by the system or manually by healthcare practitioners. In this view, you can manage and attest attestations. For more information, see Attestations [75].

Consultations

In this view, consultations where you consult a colleague are managed. For more information, see Consultations [83].

Digital colleagues

This shows which colleagues are currently logged into Clinic. If necessary, you can filter the list by care unit and role to find a specific colleague. For more information, see Digital colleagues [95].

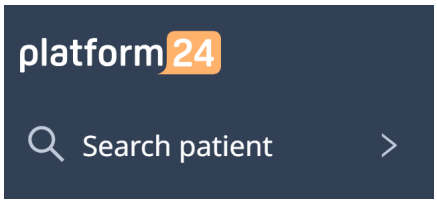
Remote monitoring

This menu item belongs to the Smart Care Plans product that enables healthcare practitioners to remotely monitor patients' measured and reported parameters. In this view, you can see which patients are

	enrolled in a remote monitoring plan at your care unit in Clinic, and monitor these patients' measured and reported parameters. For more information about remote monitoring, refer to the *Smart Care Plans – Monitoring Instructions for Use*.
Care pathways	This menu item belongs to the Smart Care Plans product that is used to automate and connect care activities for planned episodic care. For more information about planned episodic care, refer to the *Smart Care Plans –Episodic Instructions for Use*.
Billing	Here you can keep track of billable visits made in Clinic and ensure that they are billed in your care unit's regular billing system. For more information, see Billing management [96].
Irregularities	Here you can manage internal irregularities that have been reported by practitioners that have performed digital visits at the care unit in Clinic. For more information, see Irregularities [97].
Practitioner profile	Here you can see an overview of your current login in Clinic and access your personal settings. For more information, see Your profile [101].
Notifications	Here all notifications that Clinic has sent you during your current work shift are listed. These may include, for example, that you have been invited as a guest to an ongoing visit or that a colleague has accepted a visit handover that you have initiated. For more information, see Notifications [100].
Collapse menu	Used to minimize or expand the main menu.
Log out	Here you can log out of Clinic or pause your current work session.

10.2. Search patient

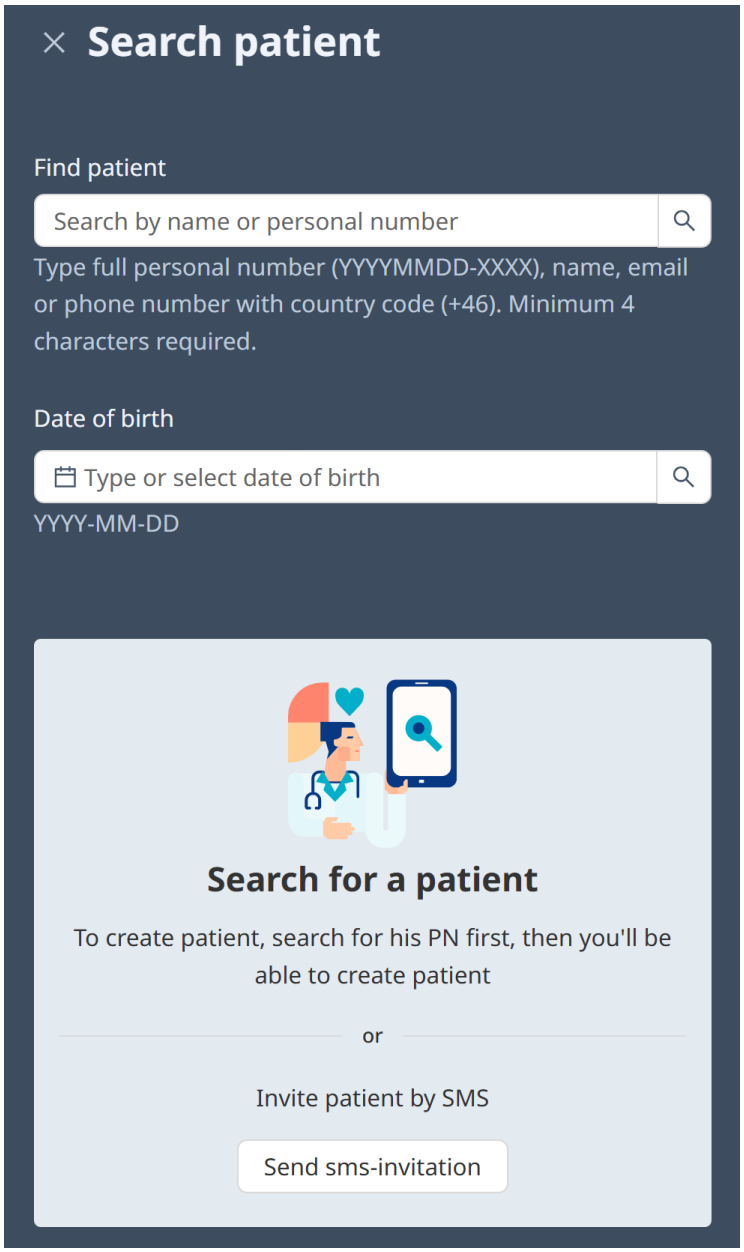
When clicking on **Search patient** in the main menu, you can search for a patient, register a new patient and send a text message with a link to the Patient app.



10.2.1. Search for a patient

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

It is also possible to find a patient by entering the date of birth in **Date of birth** field.



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

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

10.2.2. Register a new patient

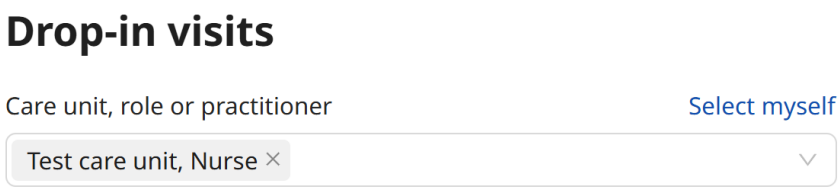
If you searched for a patient that was not found in the system, the **Create patient** option is displayed. Click there and follow the steps to register a new patient.

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

10.3. Global resource filter

The global resource filter is used to filter what you want to see in lists of some of the Clinic pages based on care unit and practitioner. As a default, the filter is set to show your current care unit

and role, and this selection is saved for all Clinic pages where this is applicable: **Drop-in visits**, **Scheduled visits**, **Async cases**, **Conference calls**, **Attestations**, **Consultations** and **Billing**. The selected filtering is also saved when you log in and out from Clinic on the same computer.



NOTE
If the global resource filter is changed in one view, it affects the other pages in Clinic: *Drop-in visits*, *Scheduled visits*, *Async cases*, *Conference calls*, *Attestations*, *Consultations* and *Billing*. The selected filtering is also saved when you log in and out from Clinic on the same computer.

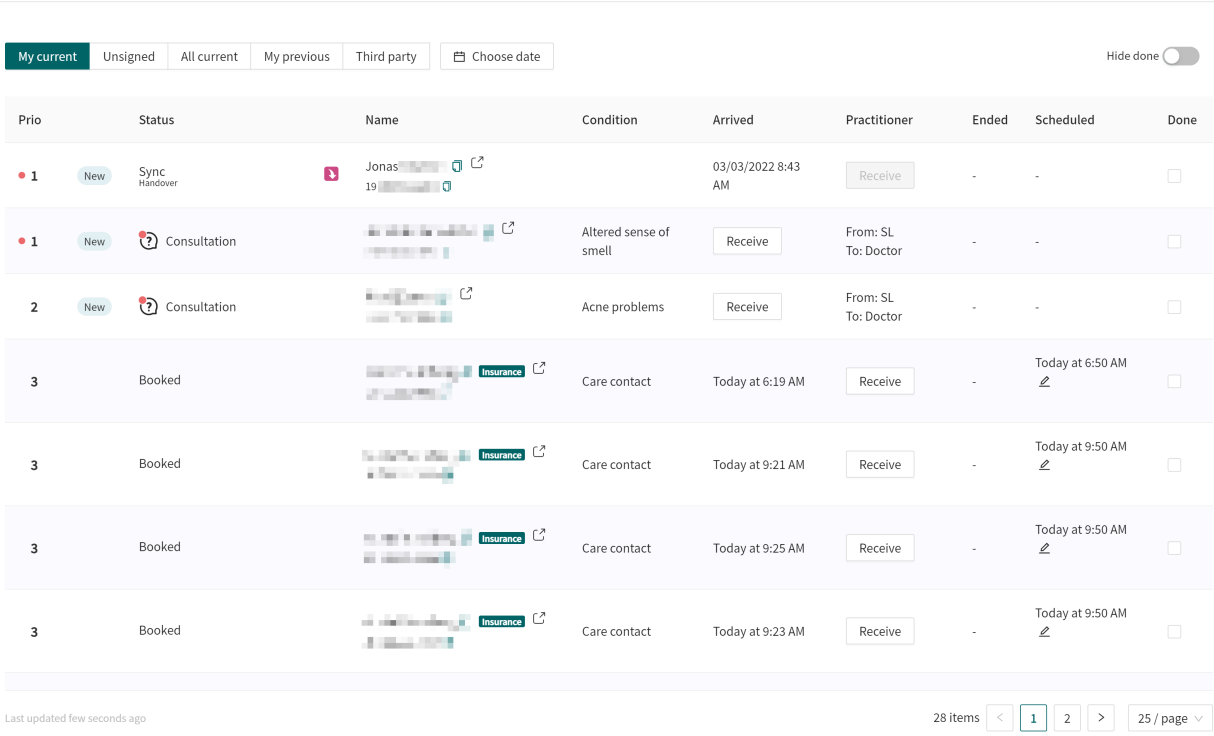
If you want to see other roles or specific staff in the pages, you can change that in the global resource filter. Keep in mind that you need to change back to your care unit and role if you only want to see the activities that applies to your role.

You can select yourself by clicking the **Select myself** button,

10.4. Start page

NOTE
This page will eventually be removed and replaced with a new and improved start page. We recommend you not to work in this page but instead to use the new list pages *Drop-in visits*, *Scheduled visits* and *Async cases*.

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



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

The ledger has different columns which are described in Columns in the ledger [24].

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

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

10.4.2. Filters displayed for the Scheduled shift type

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

10.4.3. Asynchronous cases

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

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

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

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

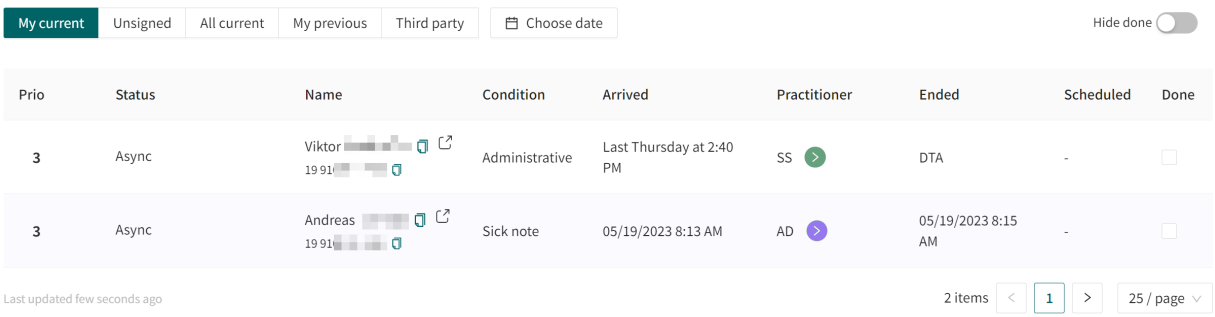


- *Red icon*: Another logged-in colleague was the last contact in the case and should, for instance (but not necessarily), deal with the case.



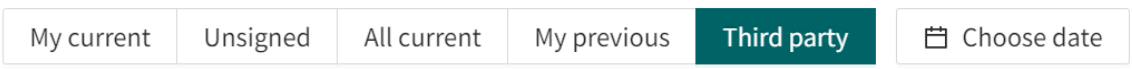
- *Purple icon*: None of those logged in were the last contact for this case. It does not therefore matter who deals with the case.





10.4.4. Filter appointments as a guest (third party)

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



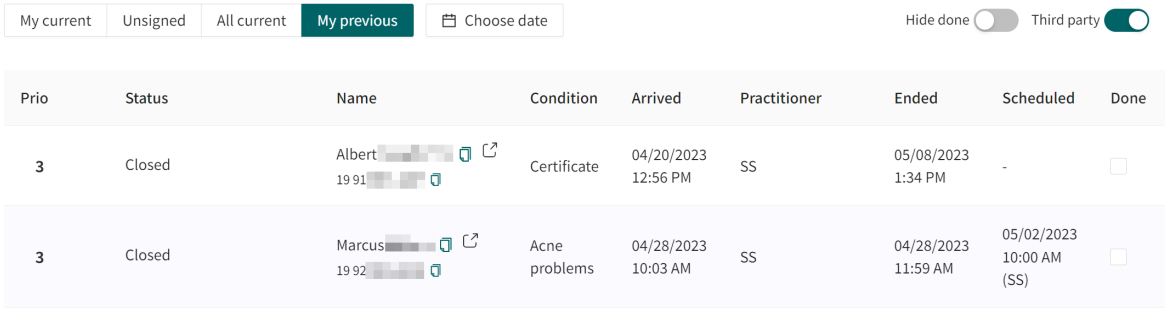
2. The tab disappears when the meeting is over. You can find the appointment by going to the **My previous** tab.



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



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



10.4.5. Columns in the ledger

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

Prio — Specifies appointment priority defined by the customer. 1 is highest, 5 is lowest. Priority 1 appointments must be received before second priority ones, and so on. Those with the highest priority end up at the top of the ledger. A notification (message) appears in the bottom right-hand corner of the browser window when a priority 1 patient joins the queue. This is described in New prio 1 appointments [25]

Priority can for example be defined as follows:

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

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

Name — The patient's name and unique personal identifier.

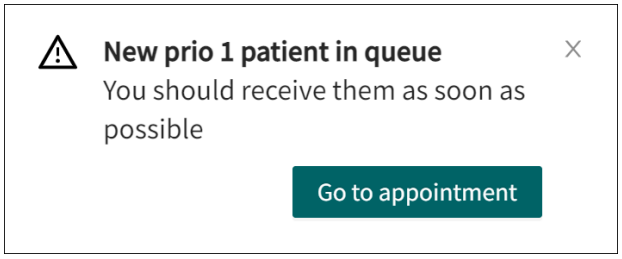
Condition — Contact reason for the current appointment.

Arrived — When the patient joined the queue.

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

10.4.6. New prio 1 appointments

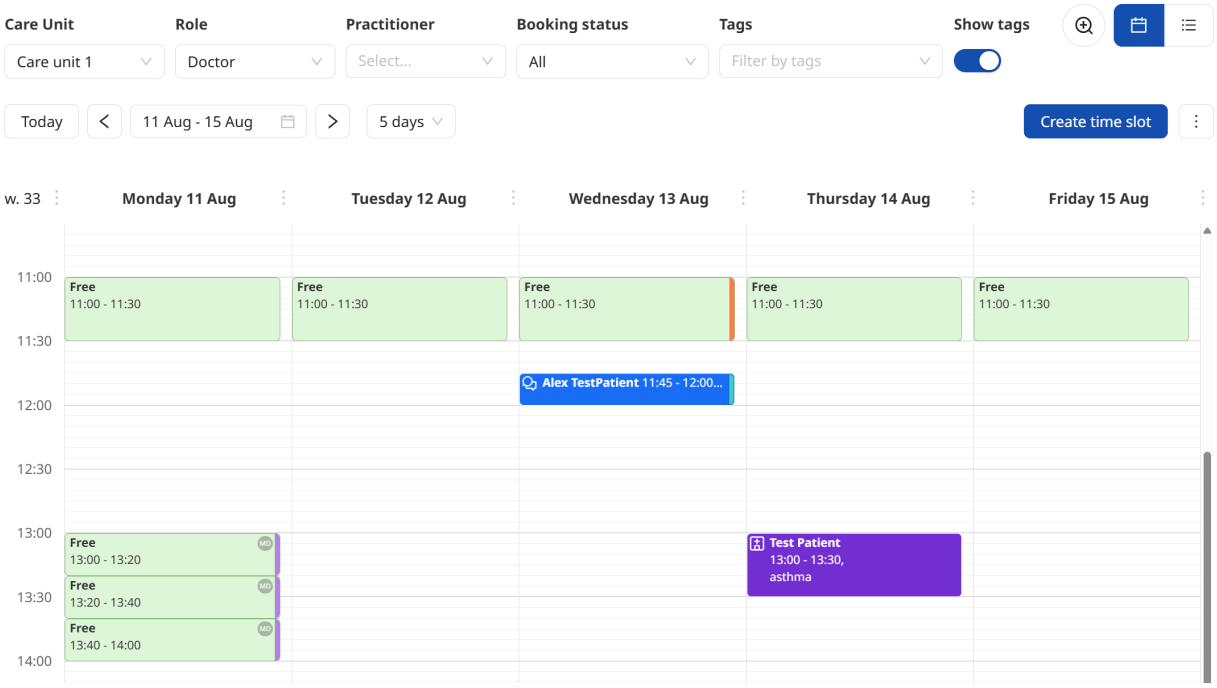
When a priority 1 patient queues, a message will appear in the lower right of the web window, regardless of where you are in Clinic. This pop-up window looks like the image here.



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

10.5. Calendar

The **Calendar** workspace is available to care units that have a digital flow to schedule time slots. Only those in your care unit who schedule time slots have access to this feature.



The calendar in Clinic is used to manage bookable time slots for scheduled visits. This can be time slots booked by you and your colleagues in Clinic, but also time slots booked by patients themselves via the Patient app – if your healthcare organization's digital patient flow offers patients this option.

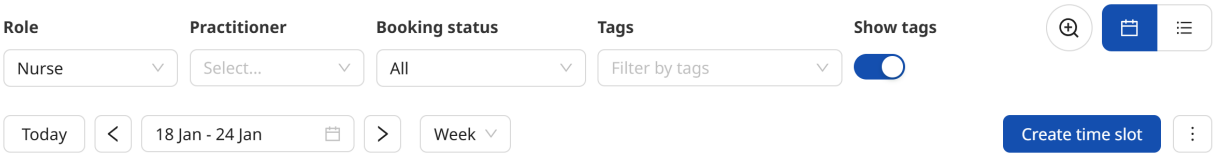
The calendar shows time slots created for the care unit you are logged in to. There are three types of time slots that have their own specific color:

- **Free** (green): The time slot is available for booking.
- **Scheduled digital visit** (blue): The time slot is scheduled for a digital patient visit.
- **Scheduled physical visit** (purple): The time slot is scheduled for a physical patient visit.

NOTE

Currently, the calendar only shows available, bookable time slots and scheduled visits of the *Scheduled* type – that is, visits that have been booked at a pre-set time in the calendar. This means that scheduled visits of the type *Video visit,* as well as group calls, are not shown in the calendar.

10.5.1. Calendar filtering options



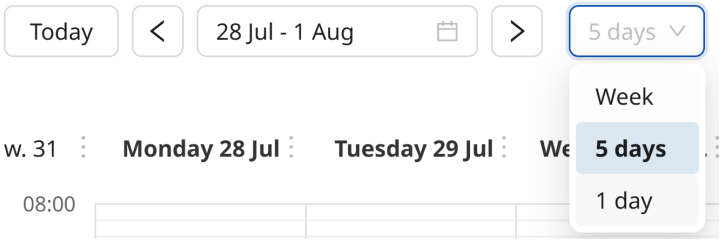
When creating time slots, it is important to enter the correct details in the filtering options in the upper part of the workspace to ensure that the time slot is added to the correct care unit and for the correct role.

The filtering options are:

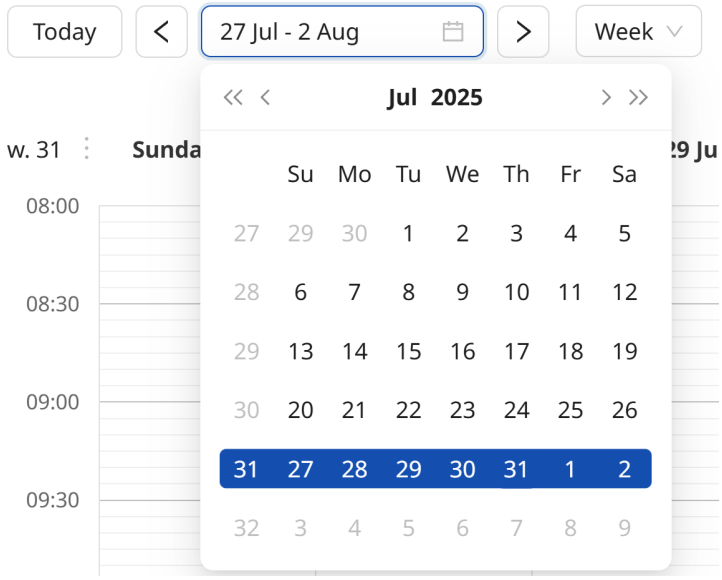
- **Role:** Select one role or "all" to view and create time slots for.
- **Practitioner:** Select the practitioner(s) to view and create time slots for.
- **Booking status:** Filter to see "All", "Booked" or "Free" time slots.
- **Tags:** Tags can be added to time slots to decide which time slots should be shown to the patient. The tags can be "earmarked" and reserved for different types of patients or conditions (e.g., first time visit or re-visit).

  You can select tags by a predefined set of tags when creating a new time slot. You can filter with tags when booking a scheduled visit in Clinic.
- **Filter the calendar on a certain week or day:**

  In the filtering options, you can select to display a full week, a 5 day week or 1 day in the calendar. In the 1 day view, you can also compare colleagues schedules side-by-side in the calendar.



In order to display a certain week or day, you can either use the arrow keys, or click on the date span to open up a calendar pop-up-view.

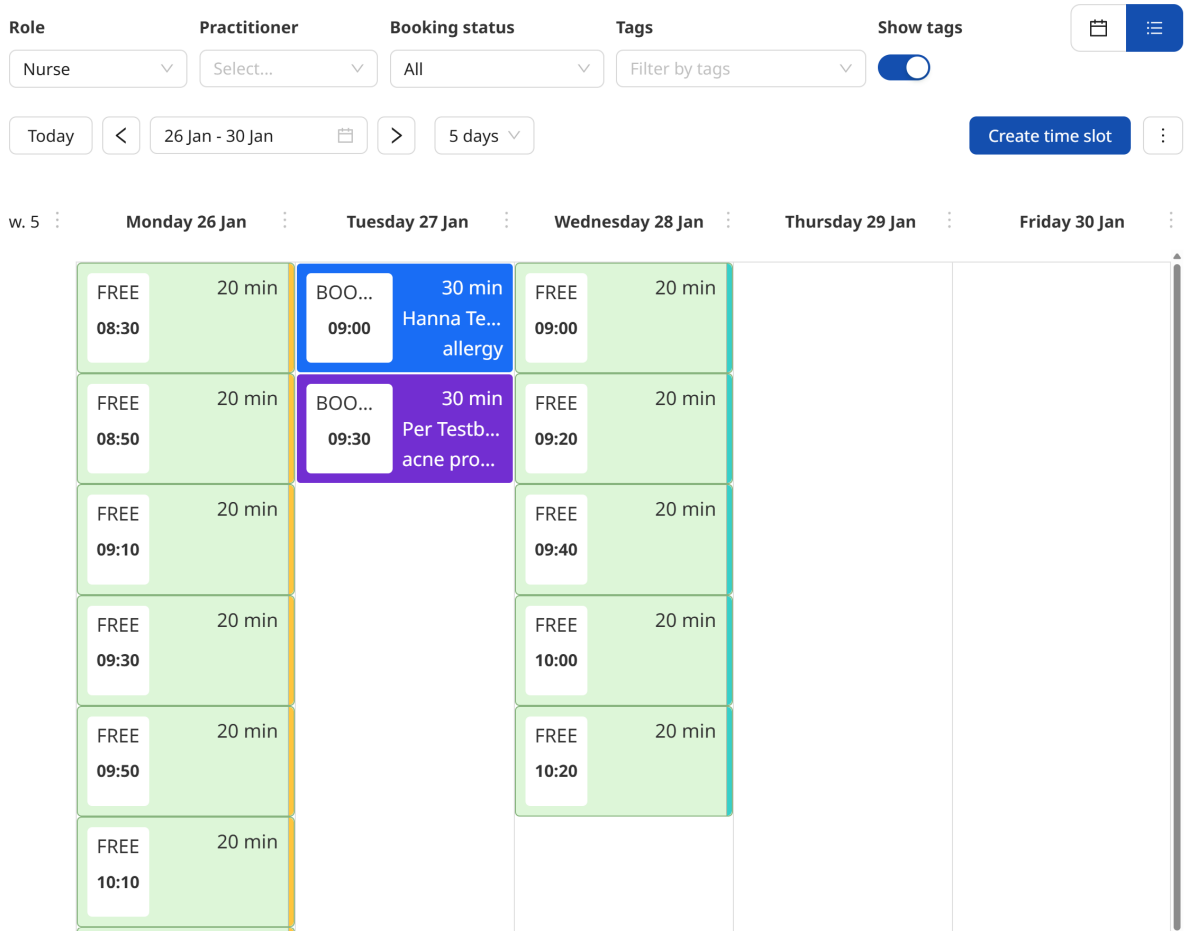


- **List view and calendar view:**

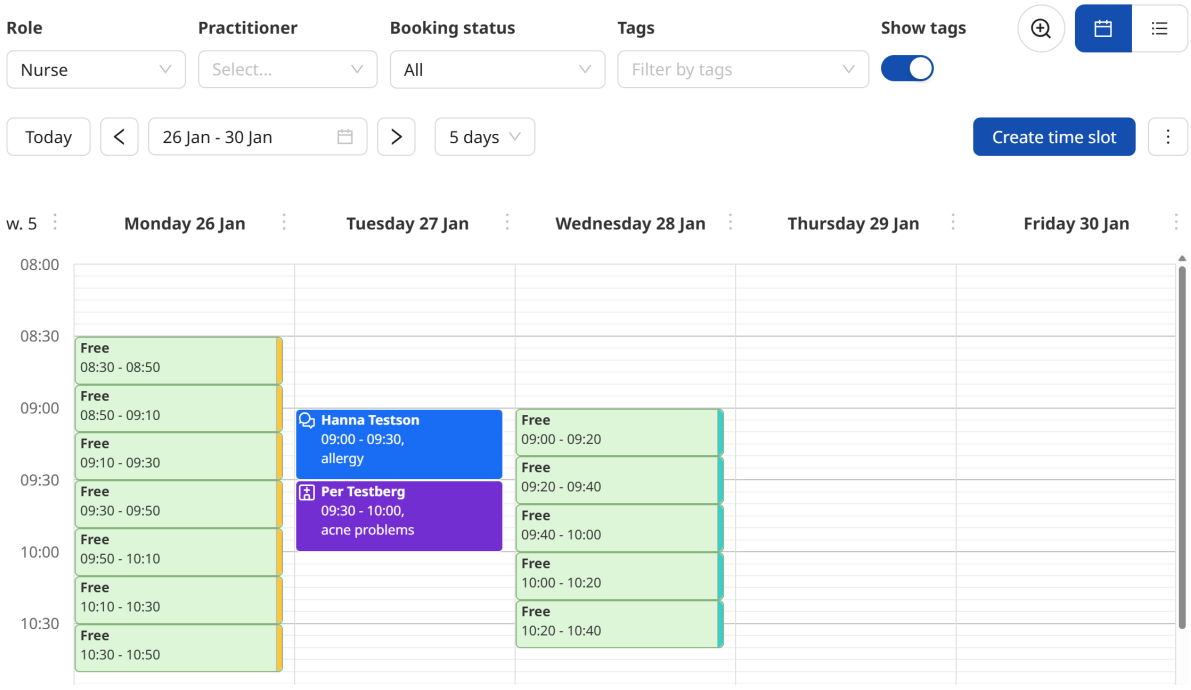
  In the upper right corner, you can select the list icon to view the calendar in a list view.



In the list view, it is easier to see the start time and duration of the time slots:



Clicking the calendar icon in the upper right corner will switch back to the default calendar view.



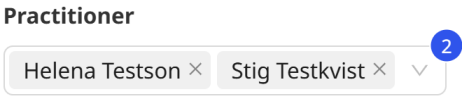
In the calendar view, it is also possible to zoom in or out using the magnifying glass.



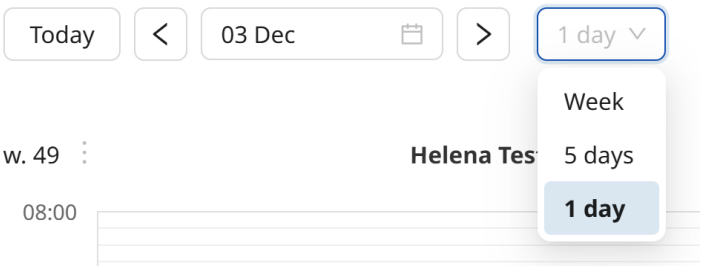
10.5.2. Compare schedules side-by-side

In the 1-day view, it is possible to compare the schedules of two or more practitioners side-by-side.

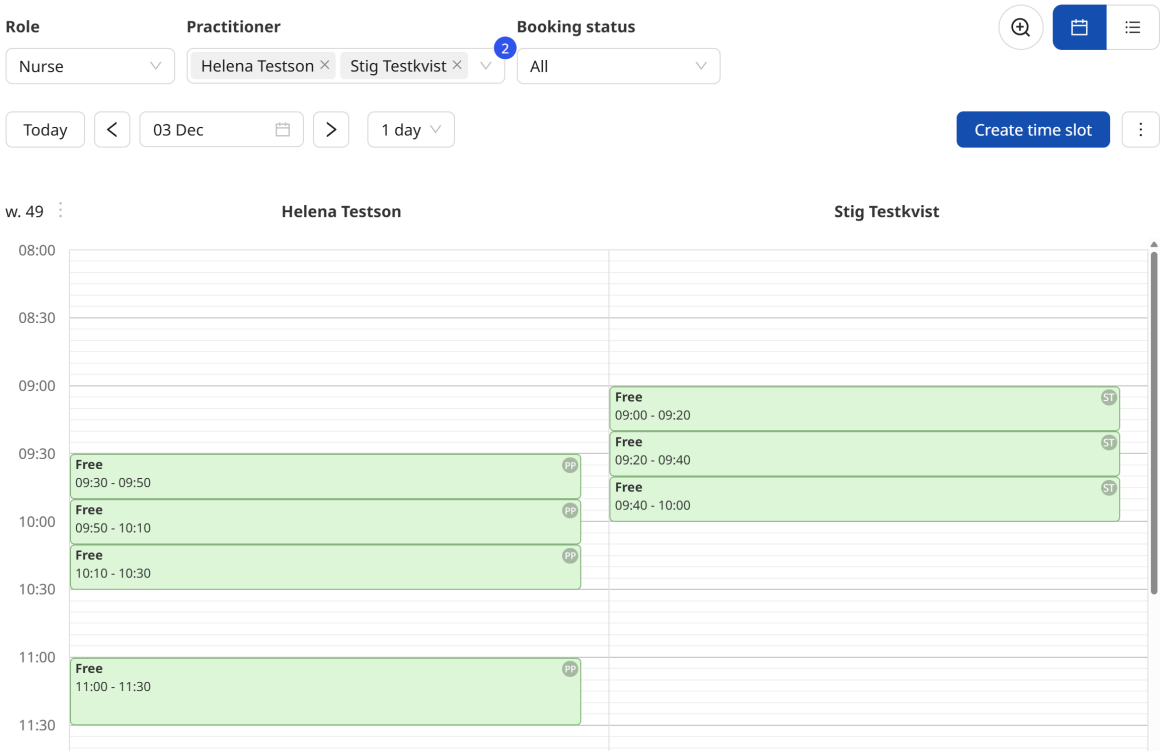
1. Select two or more practitioners in the **Practitioner** field.



2. Make sure the calendar displays the **1 day** view. This setting is required to be able to view schedules side-by-side.



The selected practitioners' schedules are now displayed side-by-side.



10.5.3. Create time slots

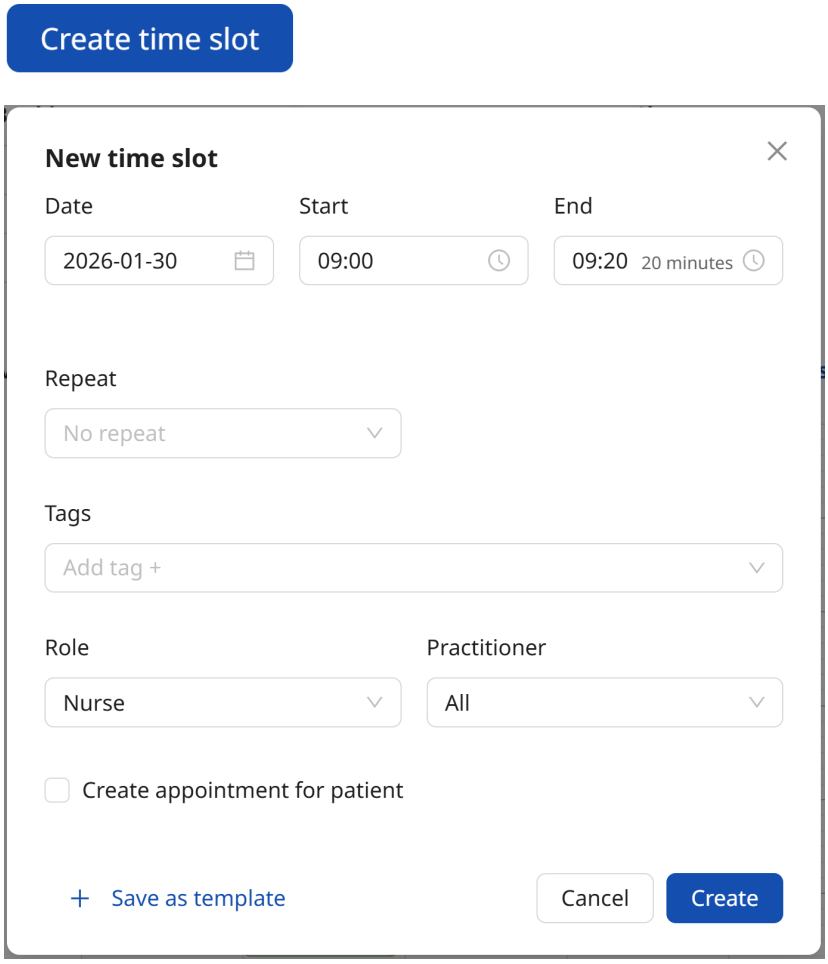
Once you have selected your filtering options in the **Calendar** workspace, you can start creating time slots. The created time slots can then be booked by a practitioner or a patient.

IMPORTANT
The time slots you create, book, edit, or delete in the Clinic calendar will not automatically be updated in your care unit's regular appointment book. Therefore, when you make a change in the Clinic calendar, remember to also update your regular appointment book according to your healthcare organization's procedures.

NOTE
If your care unit has enabled the option to work with predefined time templates in the Clinic calendar, you can choose to create the new time slot based on a predefined template. This means that some of the steps below will be performed automatically. You can read more about how to create a time slot based on a template here: Create time slot with template [41].

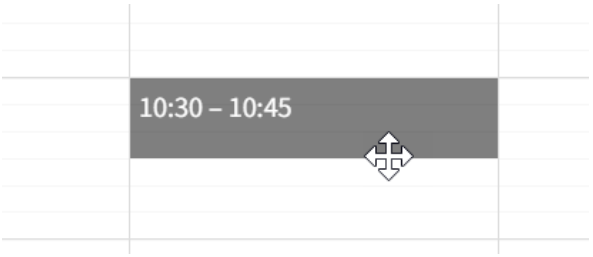
To create time slots:

1. Click the **Create time slot** button to open the **New time slot** dialog.

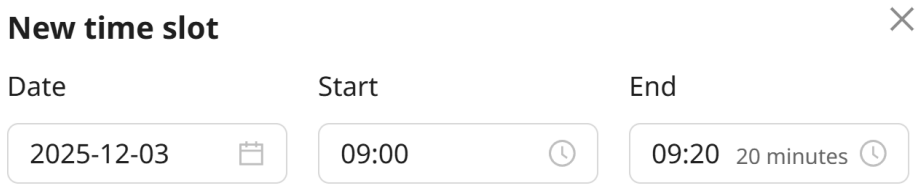


You can also create a time slot by placing the mouse at the desired start time in the calendar. Then either click once to open up the **New time slot** dialog, or click while dragging to set the desired duration (see image). The **New time slot** dialog opens when you release the mouse.

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

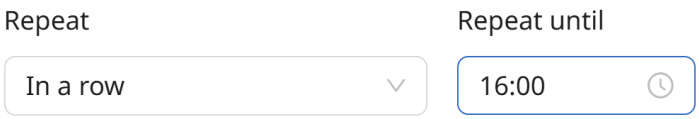


2. Enter the date, start time, and end time for the time slot. In the **End** time field, the visit duration is shown based on the selected start time and end time.



3. To create a series of repeated time slots, select the desired frequency from the **Repeat** drop-down list. The options are:
   - **Daily**: The time slot repeats at the same time every day until the selected end date.
   - **Weekly**: The time slot repeats on the same day and at the same time every week until the selected end date.
   - **Monthly**: The time slot repeats on the same day and at the same time every month until the selected end date.
   - **In a row**: The time slot repeats consecutively with the same duration on the same day until the selected end time.

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



IMPORTANT
If you add a range of time slots that extends over weekends/holidays, time slots will also be created on the weekends/holidays. The system does not detect if and when the clinic is closed or open. You therefore need to manually remove the time slots created on these days. Read more about how to delete time slots here: Deleting several free time slots [37]

4. Select if the time slot should include tags. For more information about tags, see Using tags in time slots [45].
5. Select which role the time slot should be linked to, and optionally which practitioner. If you only want to link the visit to a specific role without assigning a specific practitioner, you can leave the **Practitioner** field empty.
6. Choose whether to link the visit to a specific patient by selecting the **Create appointment for patient** checkbox. For more information, see Book patient directly from the calendar [32].

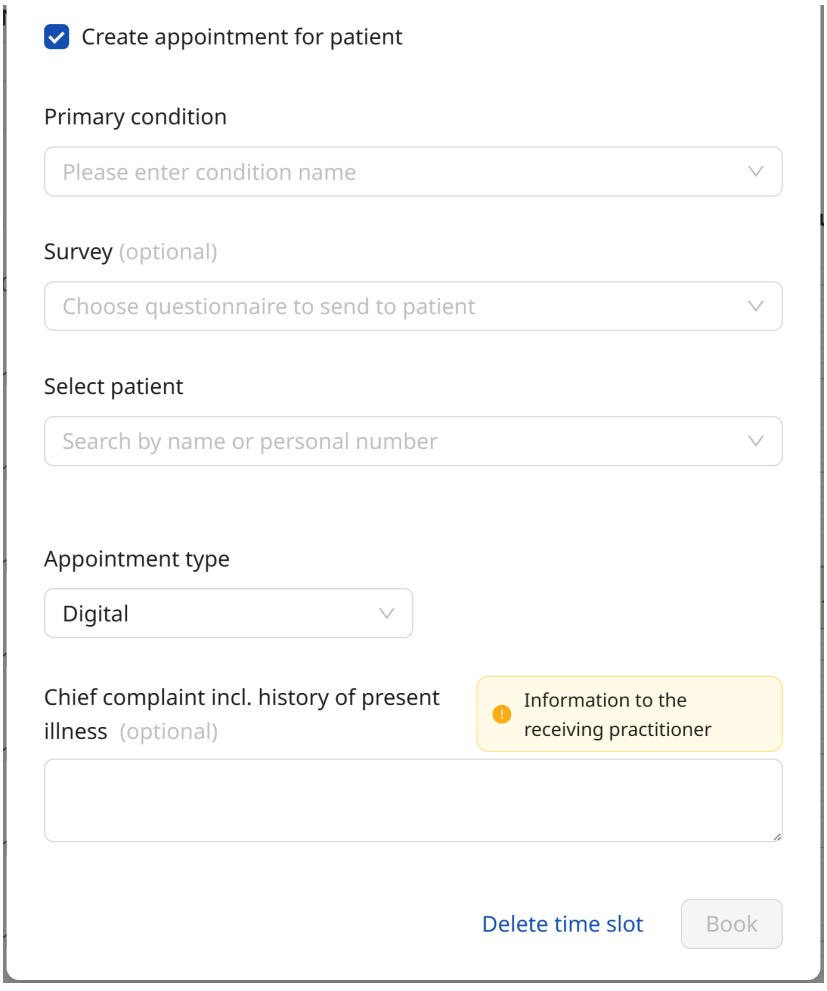
7. To save the time slot as a template, click the **+ Save as template** button. For more information about templates, see Creating and managing time slot templates [39].
8. Click **Create**. The new time slot is now created and available in the calendar.

10.5.4. Book patient directly from the calendar

When creating a new time slot or editing an existing one, you can book a patient directly from the **Calendar** workspace. You can also book a patient if you edit a time slot in a time slot series, but then only the current time slot in the series will be affected.

IMPORTANT
The time slots you create, book, edit, or delete in the Clinic calendar will not automatically be updated in your care unit's regular appointment book. Therefore, when you make a change in the Clinic calendar, remember to also update your regular appointment book according to your healthcare organization's procedures.

1. Create a new new time slot according to the instructions in Create time slots [29], or click on an existing time slot in the calendar.
2. In the **New time slot** dialog or **Edit time slot** dialog, select the **Create appointment for patient** checkbox. When this option is selected, the fields below become available.



3. Select the primary condition from the **Primary condition** list. The primary condition is used to describe the patient's case and is displayed to the patient in the Patient app.

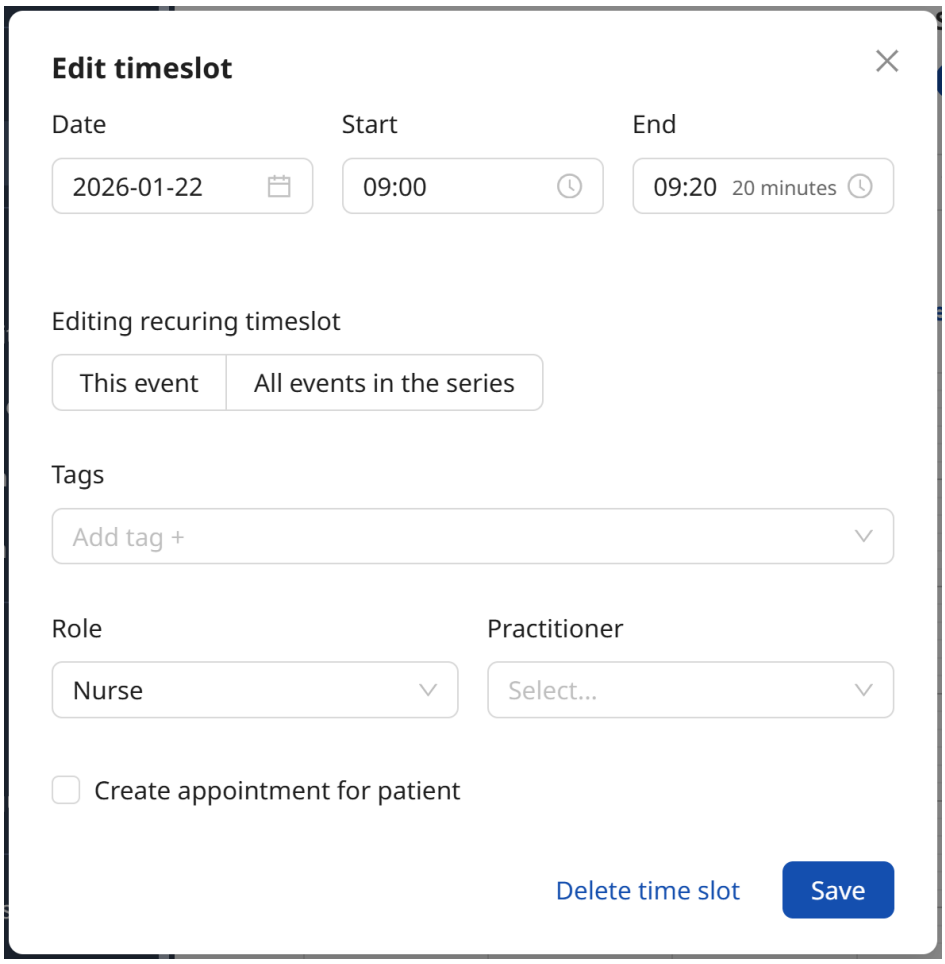
4. To send a questionnaire to the patient, select the questionnaire from the **Survey** drop-down list. If a description has been added in the **Description of questionnaire** field in Content Studio, this description will be shown in the **Survey** drop-down list.
5. Select the patient by searching for the name or unique personal identifier.
6. Select visit type (e.g., digital or physical). The available visit types depend on what you have enabled in Clinic.
7. Optionally, write a short text on what the visit is about to the receiving practitioner booked for the visit. This text will not be shown to the patient.
8. Click **Create** or **Book**, depending on if you are creating a new visit or editing an existing one. The created visit is now visible in the calendar.

10.5.5. Editing or deleting a free time slot

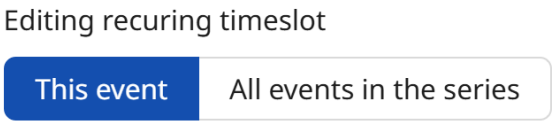
NOTE
If you want to delete a booked visit from the calendar, you must first reschedule or cancel the visit with the patient. You can then follow the steps below to delete the the time slot, which will then become available (free).

Editing a free time slot

1. Click on the time slot you want to edit in the calendar. This opens the **Edit time slot** dialog.



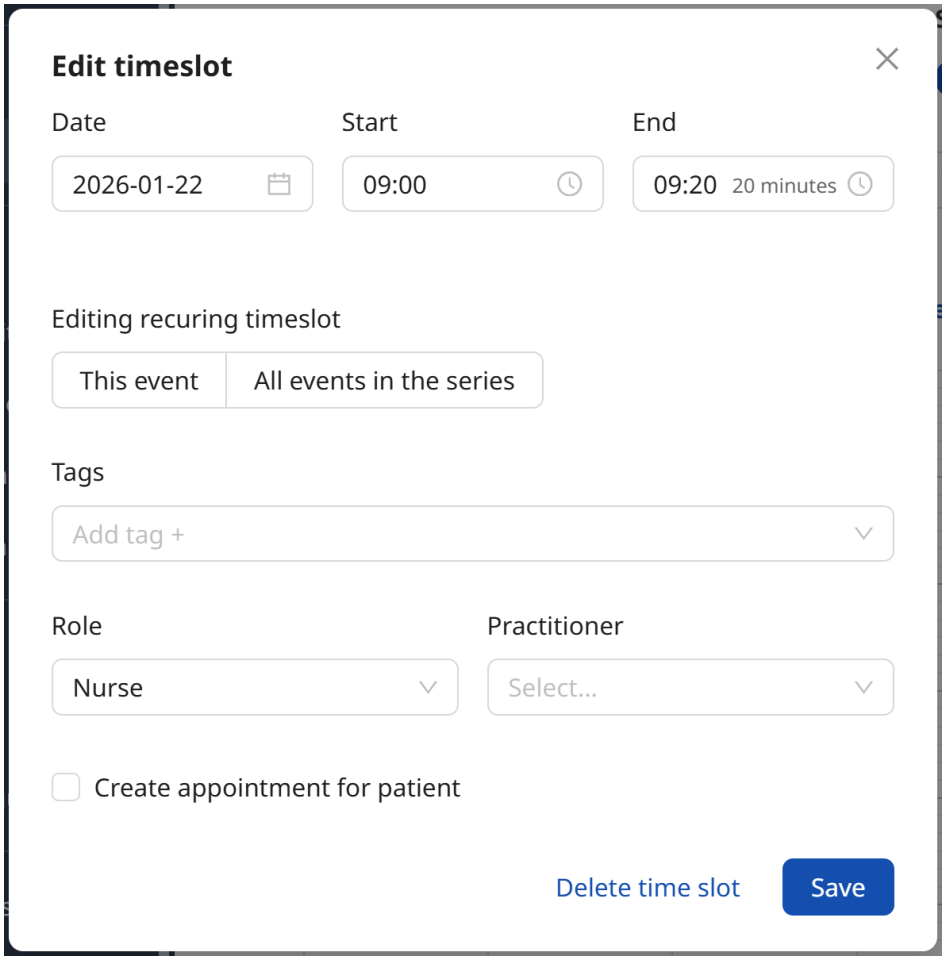
2. Make the desired changes. To read more about the desired settings, see Create time slots [29].
3. If the time slot is recuring, you can select if your change should apply to only the current time slot (**This event**), or to all time slots in the series (**All events in the series**).



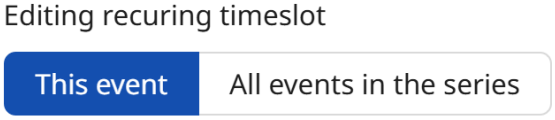
4. Click **Save**.

Deleting a free time slot

1. Click on the time slot you want to edit in the calendar. This opens the **Edit time slot** dialog.



2. If the time slot is recuring, you can select to delete only the current time slot (**This event**), or to all time slots in the series (**All events in the series**).



3. Click the **Delete time slot** button.

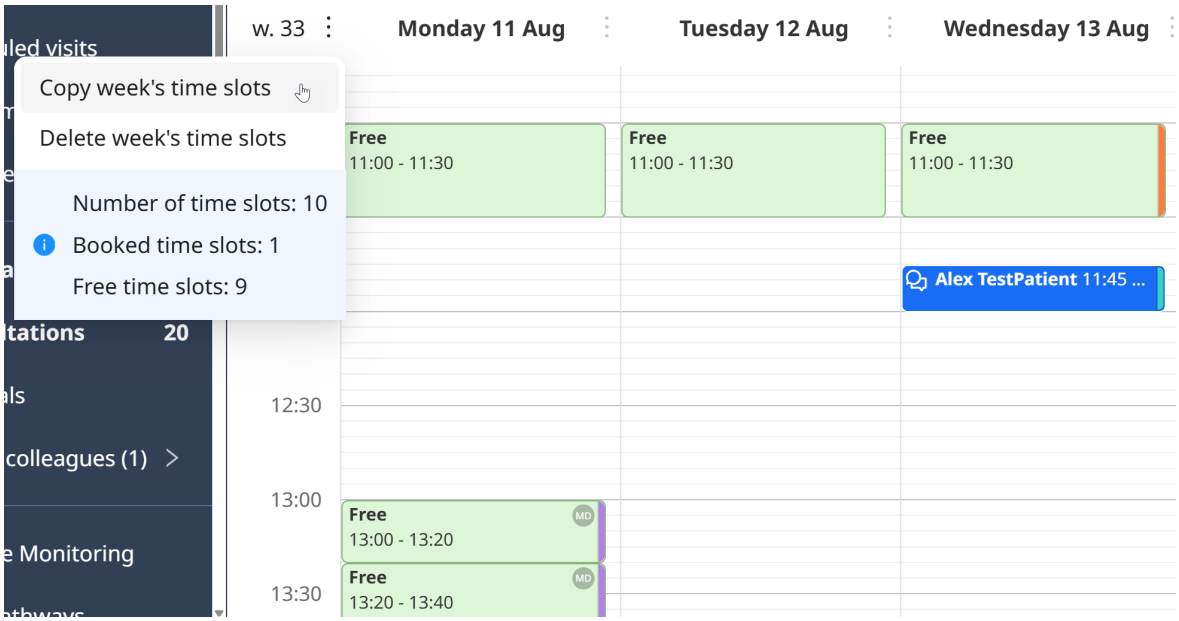


10.5.6. Copying several time slots

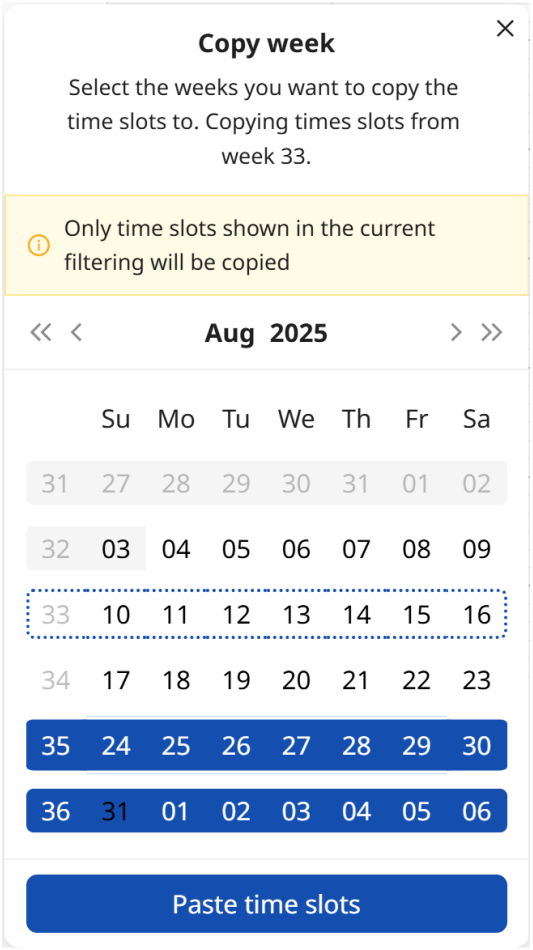
Using the copy/paste feature, it is easier to add many time slots in one go. It is also easier to repeat the same schedule for several days and/or weeks.

To copy time slots:

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



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



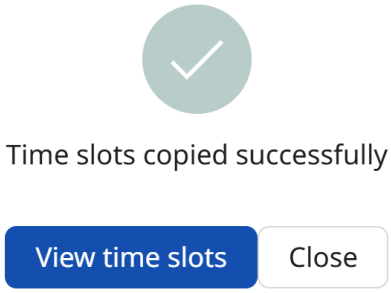
NOTE
Only the time slots that are visible in the calendar with the current filtering will be copied. For more information on the filtering options, see Calendar filtering options [26].

4. Click the **Paste time slots** button.

NOTE
When copying time slots, any previously scheduled time slots with patients will be pasted as free time slots (not connected to a specific patient).

NOTE
When pasting the time slots into another day/week, it will not be taken into account if there are other time slots at the same time (i.e., scheduling conflicts). The new time slots will be added in parallel to the already existing times.

5. Click **Close** to close the confirmation dialog, or **View time slots** to go the day or week that the time slots have been copied to.



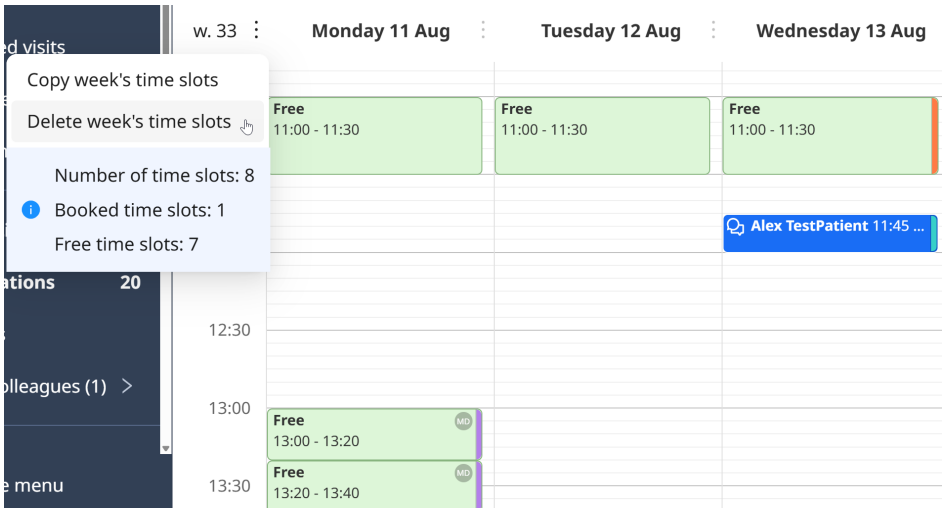
NOTE
The **View time slots** button will only be visible if the time slots have been copied to a day or week not currently shown in the calendar.

10.5.7. Deleting several free time slots

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

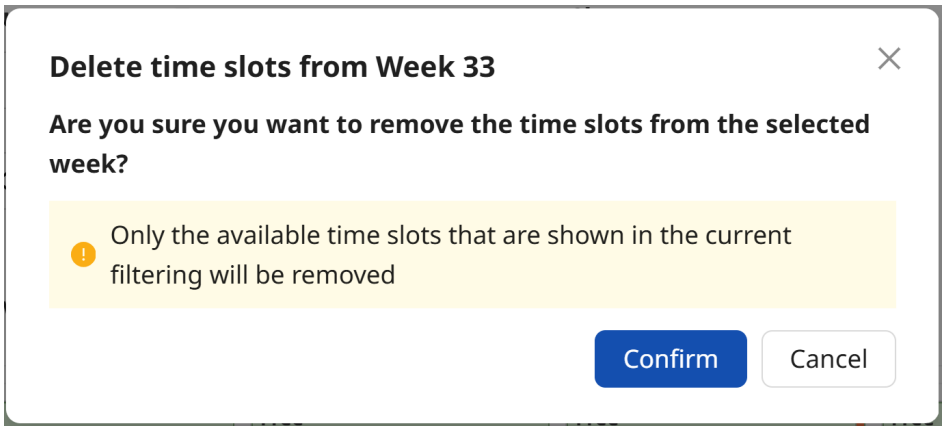
Deleting all free time slots from a day or week

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



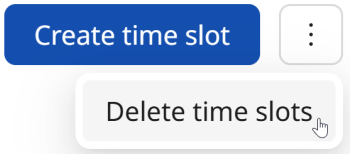
NOTE
Only the free time slots that are visible in the calendar with the current filtering will be deleted. For more information on the filtering options, see Calendar filtering options [26].

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

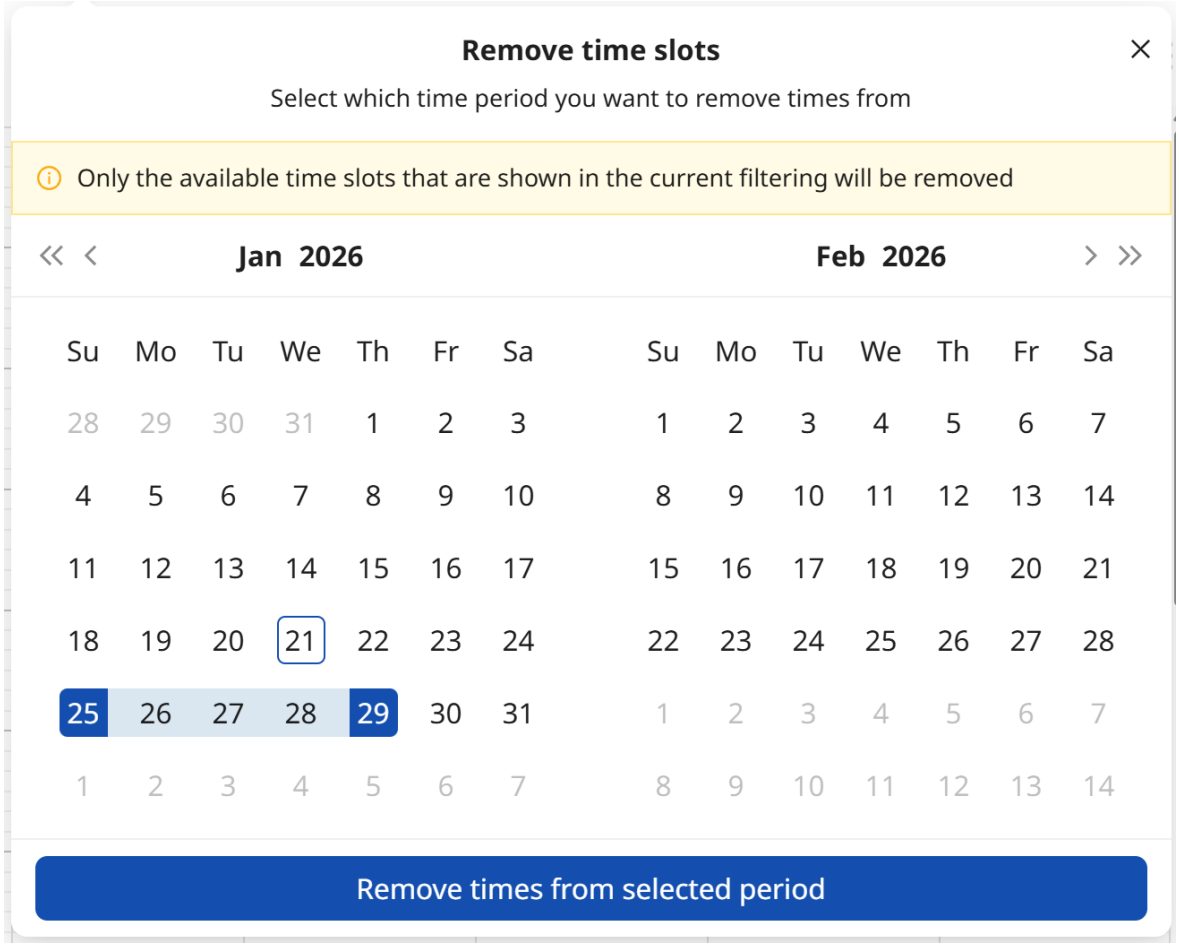


Deleting all free time slots from a time range

1. Click on the three dots above the **Calendar** workspace to the right and select **Delete time slots**.



2. Select the time range in which you want to delete the time slots.



NOTE
Only the free time slots that are visible in the calendar with the current filtering will be deleted. For more information on the filtering options, see Calendar filtering options [26].

3. Confirm the deletion by clicking the **Remove times from selected period** button.

10.5.8. Creating and managing time slot templates

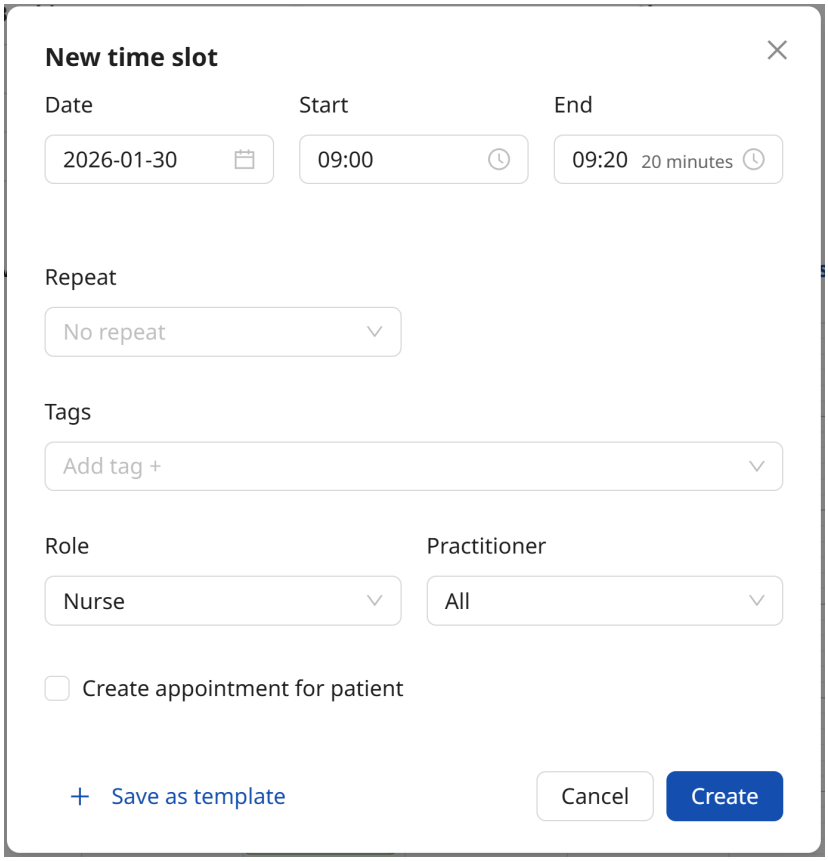
Time slot templates will enable you to create time slots using prefilled templates. In the templates you can specify duration, tags, role and practitioner. The time slots created by a template will be connected to the template, and you can then update the time slots by updating the template instead of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

Create a time slot template

1. Click somewhere in the calendar or the **Create time slot** button.



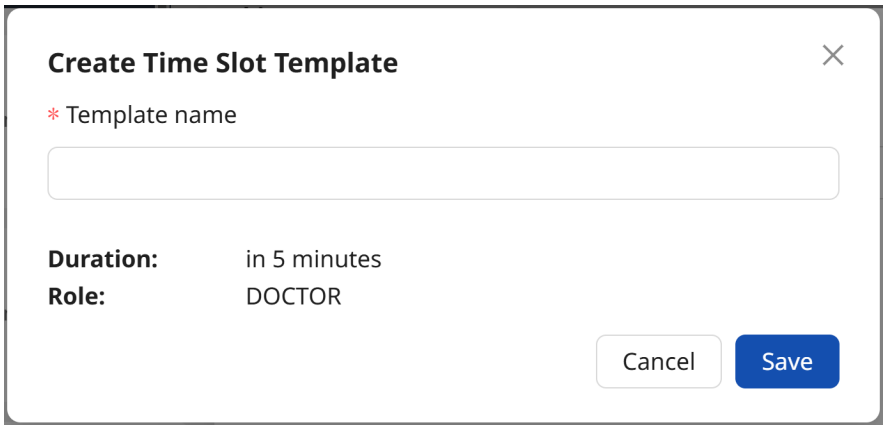
This opens the **New time slot** dialog.



2. Add the details for the time slot in the same way as described in Create time slots [29].
3. Click the **Save as template** button.



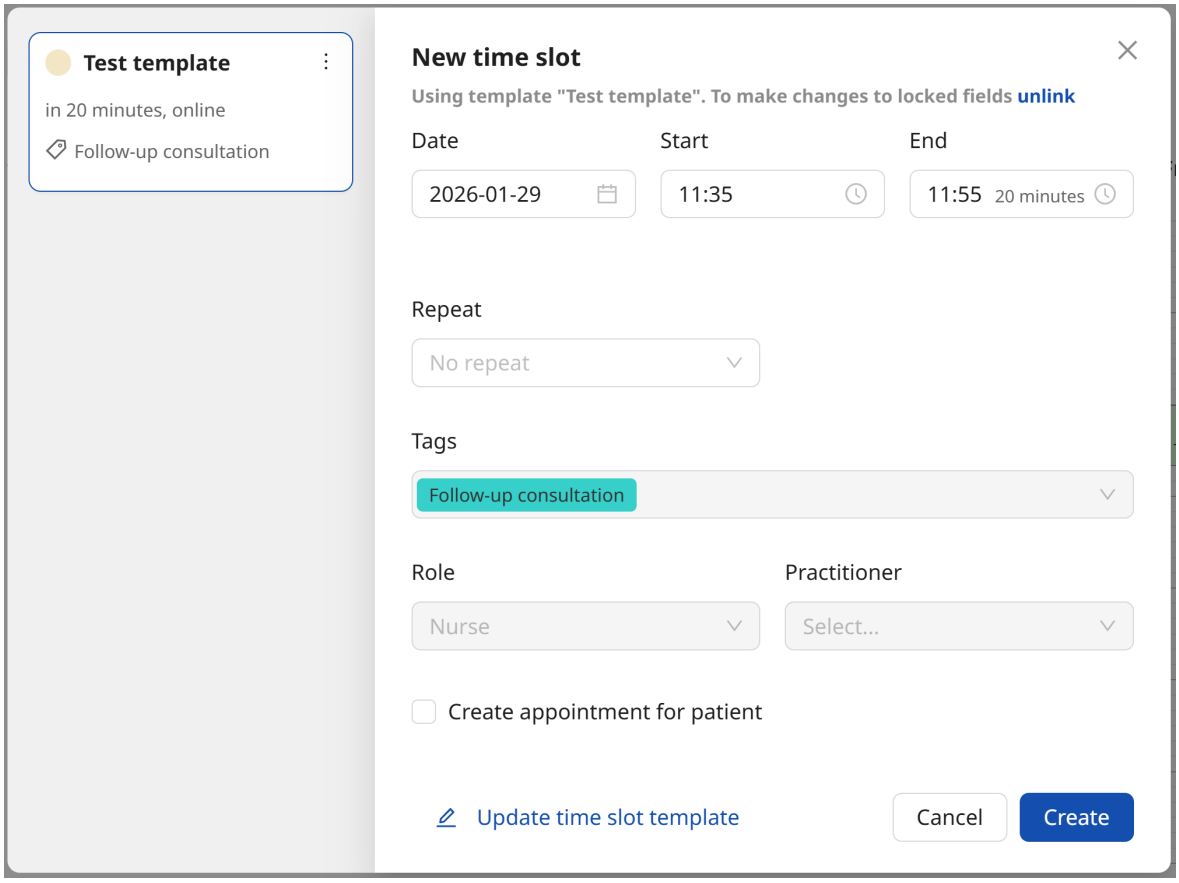
4. Give the template a name.



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



The template is now available in the **New time slot** dialog when creating a new time slot. The fields used from the template are locked and grayed out, but can be edited by clicking "unlink" at the top of the dialog.



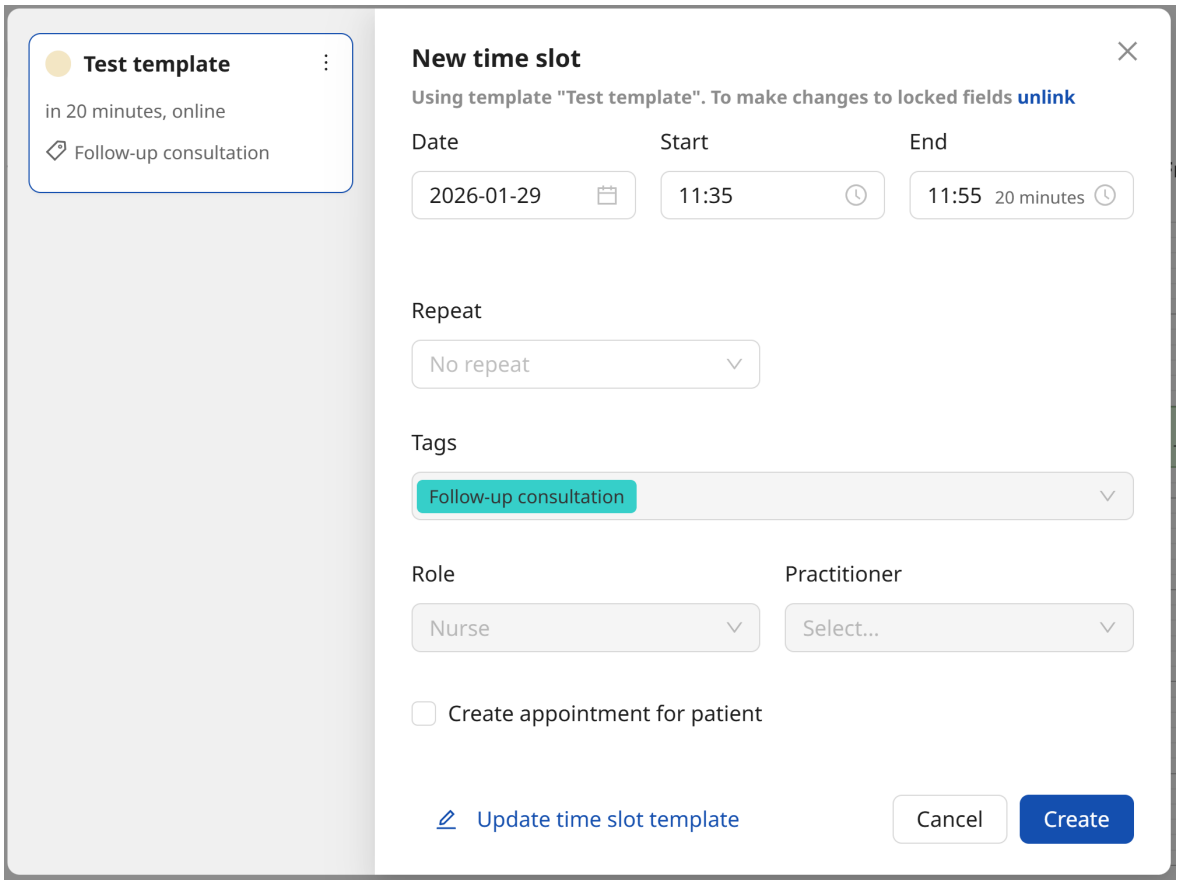
Create time slot with template

IMPORTANT
The time slots you create, book, edit, or delete in the Clinic calendar will not automatically be updated in your care unit's regular appointment book. Therefore, when you make a change in the Clinic calendar, remember to also update your regular appointment book according to your healthcare organization's procedures.

1. Click somewhere in the calendar or the **Create time slot** button.

   This opens the **New time slot** dialog.
2. Click on the template that you want to use. All templates are visible in the left column, and you can also search for the template name if there are more than 5 templates.



The time slot is automatically populated with the parameters from the chosen template (e.g., **Tags**, **Role** and **Practitioner**.

3. Specify the date and time for the time slot.
4. Enter the date, start time, and end time for the time slot. In the **End** time field, the visit duration is shown based on the selected start time and end time.
5. Update other settings for the time slot, such as for example if it should be repeated or be linked to a specific patient. Read more about these settings in Create time slots [29].

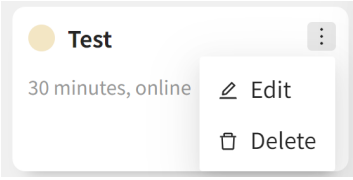
> **NOTE**
> If you want to edit the fields that are “locked” by the template, you first need to click **unlink** in the upper part of the dialog. The fields will still be populated, but can be edited for the specific time slot.

6. Click **Create**.

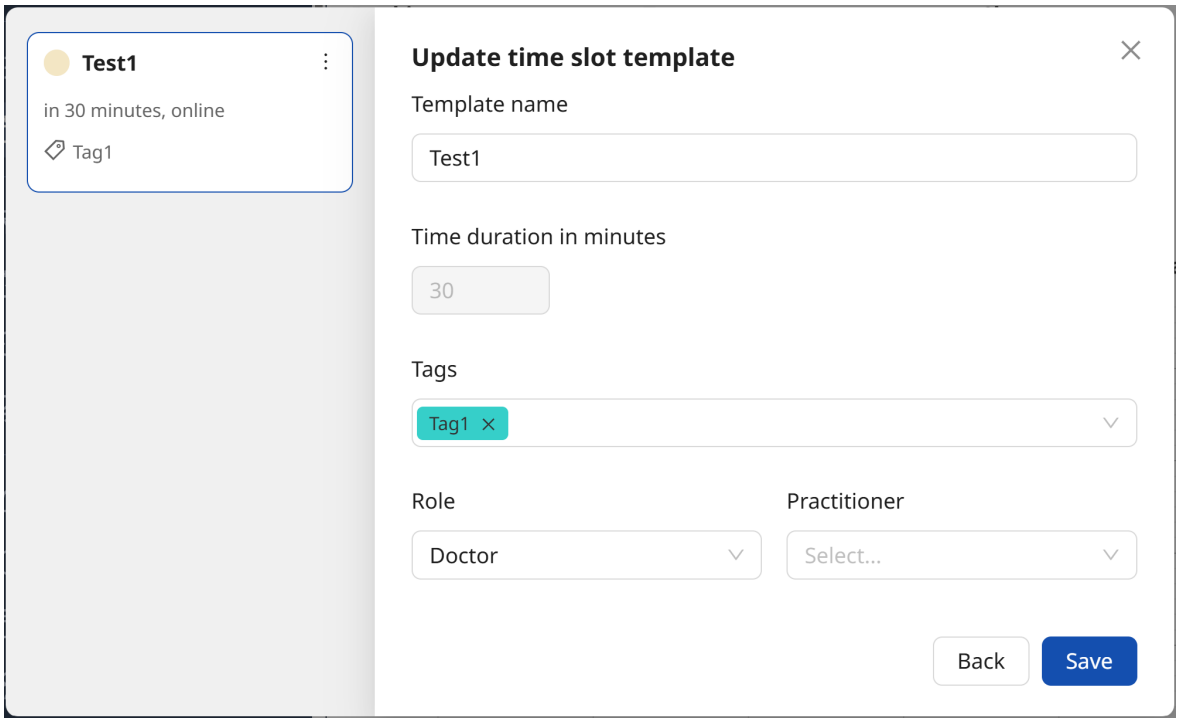
Edit a time slot template

The time slot templates are available in the **New time slots** dialog, see Create time slot with template [41].

1. Click the three vertical dots next to the template and select **Edit**.

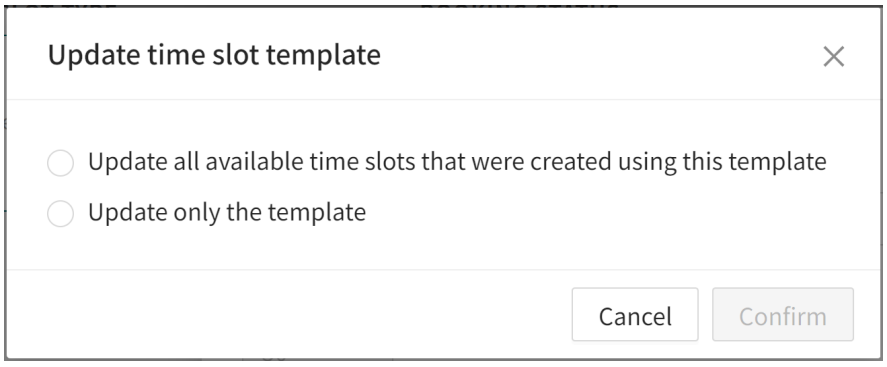


2. The **Edit** alternative allows you to update and change your template. The duration is not possible to change due to risk of scheduling conflicts. Click **Save** when you are done.

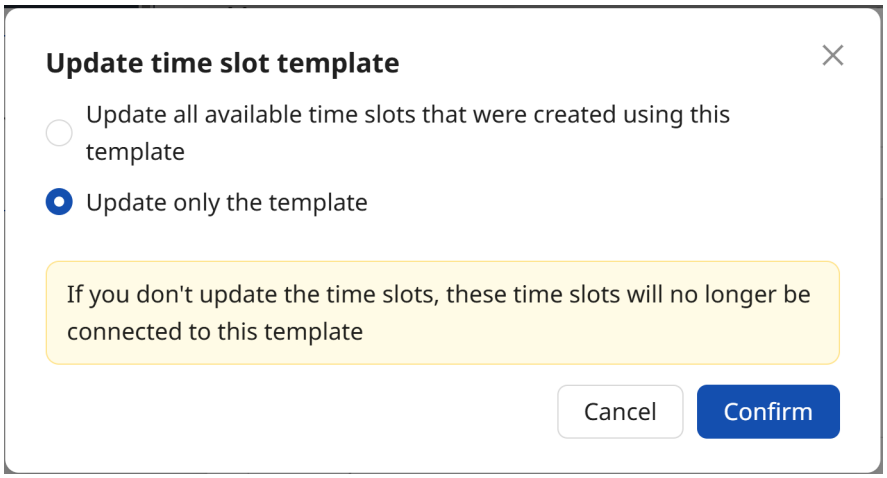


3. After clicking **Save** you have a choice between to:
   - **Update all available time slots that were created using this template**. This will update the template and the time slots that have been created with this template.
   - **Update only the template**

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



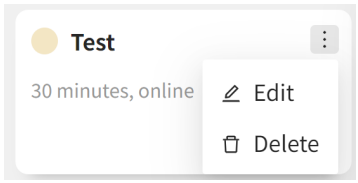
4. When you have chosen one of the alternatives, click **Confirm**.



Delete a time slot template

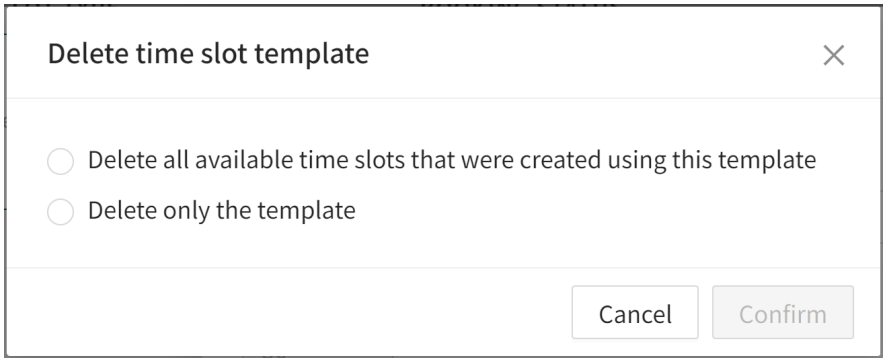
The time slot templates are available in the **New time slots** dialog, see Create time slot with template [41].

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

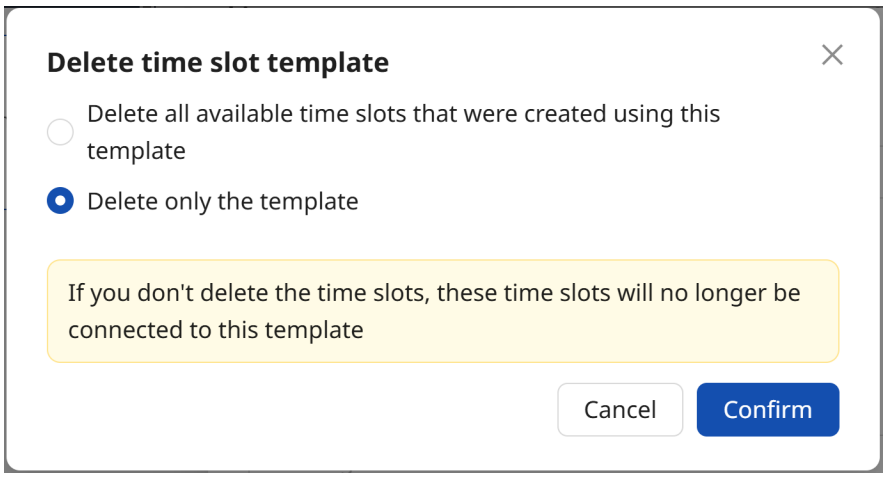


2. The **Delete** alternative gives you a choice between to:
   - **Delete all available time slots that were created using this template**. This will delete the template and the time slots that have been created with this template.
   - **Delete only the template**

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



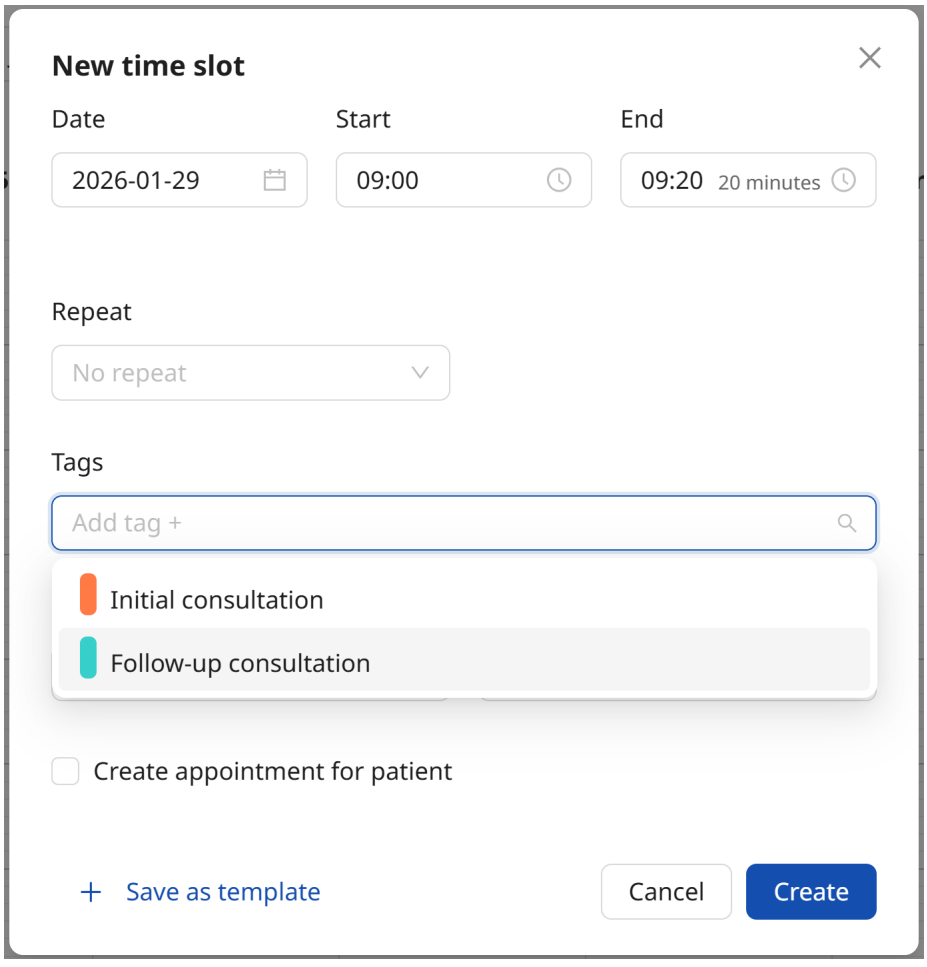
3. When you have chosen one of the alternatives, click **Confirm**.



10.5.9. Using tags in time slots

A tag is a label that can be attached to a time slot when it is created. Tags are used to distinguish between different types of bookable time slots, for example time slots for initial visits, follow-up visits, and other visit or booking types. This makes it easier for granular routing to specific time slots for patients when booking a time slot. The tags can have different purposes depending on the configuration.

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



Tags can be used in two different ways:

- **Internally by practitioners**: To facilitate planning and booking, and to provide a clearer overview in the calendar.
- **In patient-initiated flows**: Where tags can be used to control which time slots are retrieved and displayed to the patient in the Patient app, for example in the case of:
  - When booking a time slot after triage
  - When booking a time slot via a menu item
  - When booking a time slot through a booking ticket



NOTE
The predefined tags that are available in Clinic and how they are used may differ between healthcare organizations and care units. Each organization decides for itself which tags should be available based on its needs and digital patient flows.

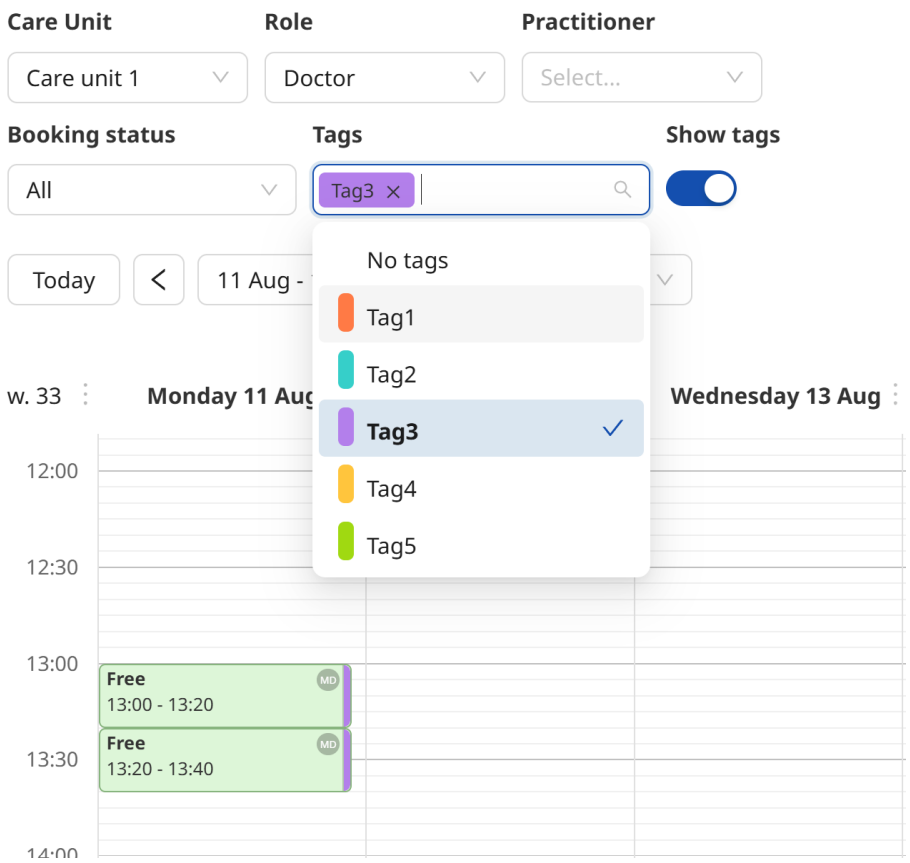


NOTE
The tags are not visible to the patients. They can only be viewed and used internally by users in Clinic.

Using tags in the calendar

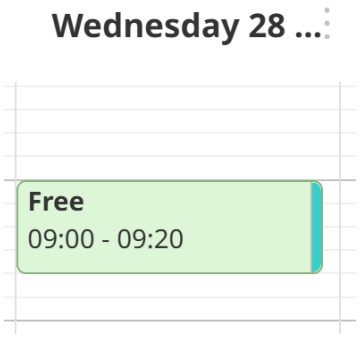
All time slots – with and without tags – are visible in the calendar view by default. Select one or more tags in the **Tags** drop-down list to only show time slots with these tags in the **Calendar** workspace. The **Show tags** slider toggles the visibility of the tags on and off.

Each tag is automatically linked to a specific color in the calendar. You can see the color of each tag in the **Tags** filter.

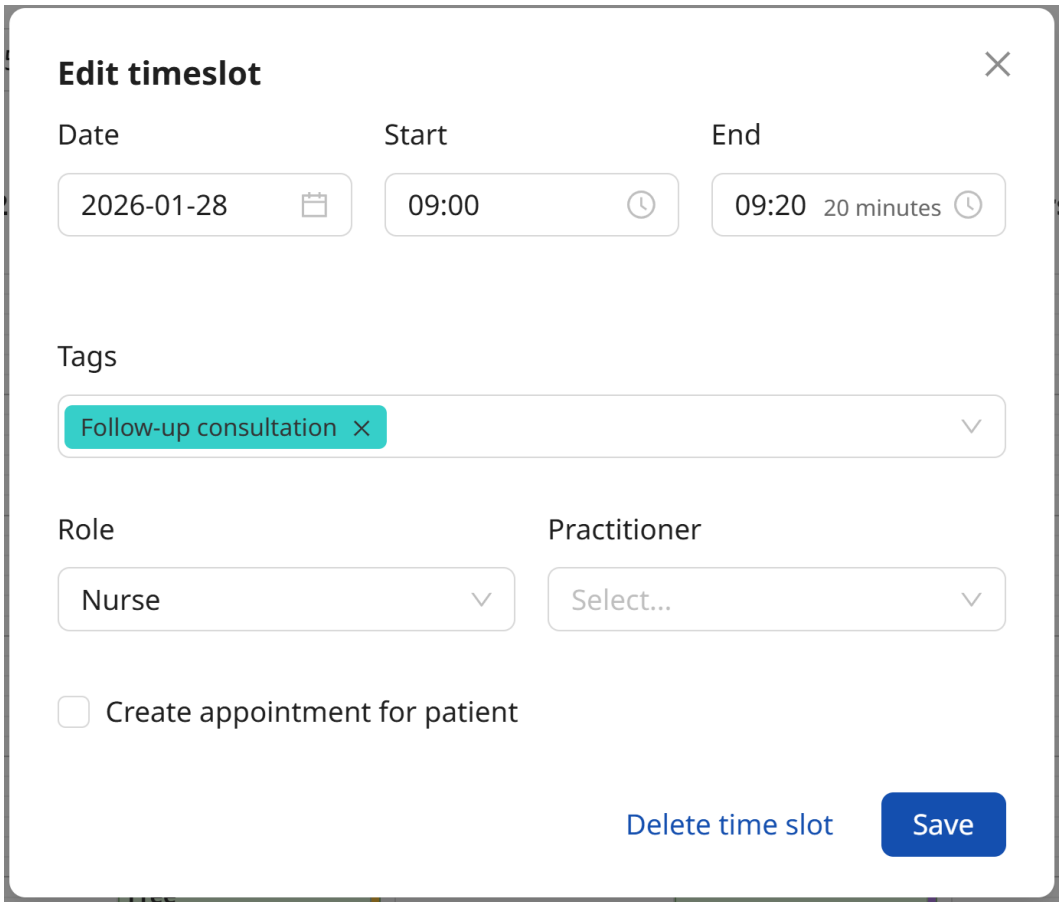


Remove tags from time slots

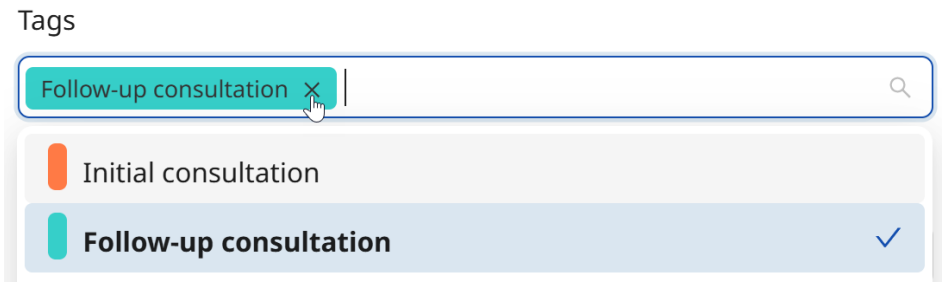
1. Click on the time slot in the calendar.



This opens the **Edit time slot** dialog.



2. Click in the **Tags** field to expand the list.
3. To remove a tag, click on the 'x' to the right of the tag or deselect it in the drop-down menu.



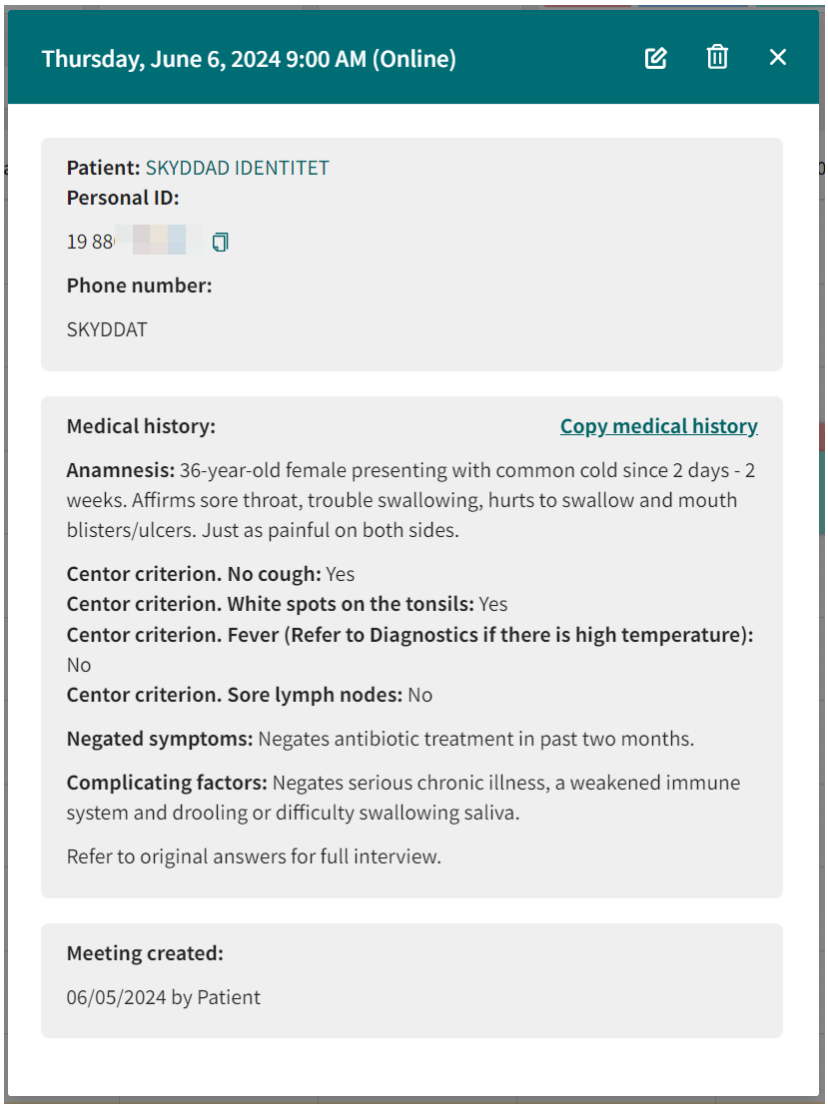
4. Click **Save**.

10.5.10. Copying visits to your external booking system

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

This is done as follows:

1. Click on the booking in question in the **Calendar** workspace to open the following display.



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



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

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

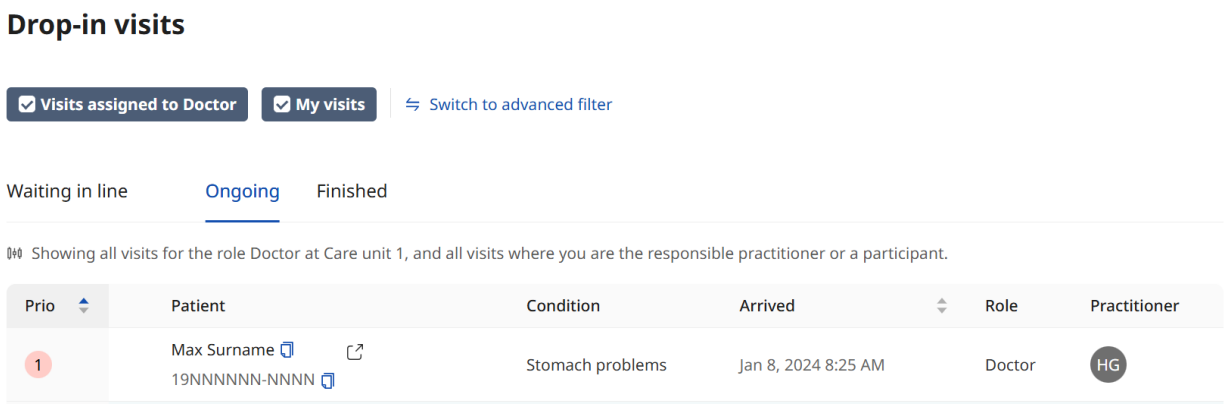
- Click **Copy Medical history** (see image above), then open a daily data entry in the regular medical records system for the patient and paste in the data. It is a good idea to add a heading to the data entry, such as the *patient's own medical history*.

10.6. Drop-in visits

A drop-in visit is a type of digital visit in Clinic. Drop-in usually means that the patient initiates the contact themselves – by starting a case in the Patient app and entering a digital waiting room – to meet practitioners as soon as possible via chat and/or video.

Some organizations also work with drop-in tickets in Clinic. This means that by sending a digital ticket, practitioners can invite a patient to a digital waiting room for a drop-in visit with a specific person or profession at a specific care unit.

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



The **Drop-in visits** view contains three tabs:

- **Waiting in line**: Here you can see drop-in visits that have not yet been received by practitioners. The patient is still in the waiting room for a digital drop-in visit. Visits are sorted by priority (if applicable) and arrival time. Priority 1 is the most urgent.
- **Ongoing**: Here you can see drop-in visits that are currently in progress, that is, those that have been received by practitioners. Visits are sorted by priority (if applicable) and arrival time.
- **Finished**: Here you can see drop-in visits that have been completed within the chosen date range. The default date range is set to show the last 30 days. The visits are sorted by when they were finished.

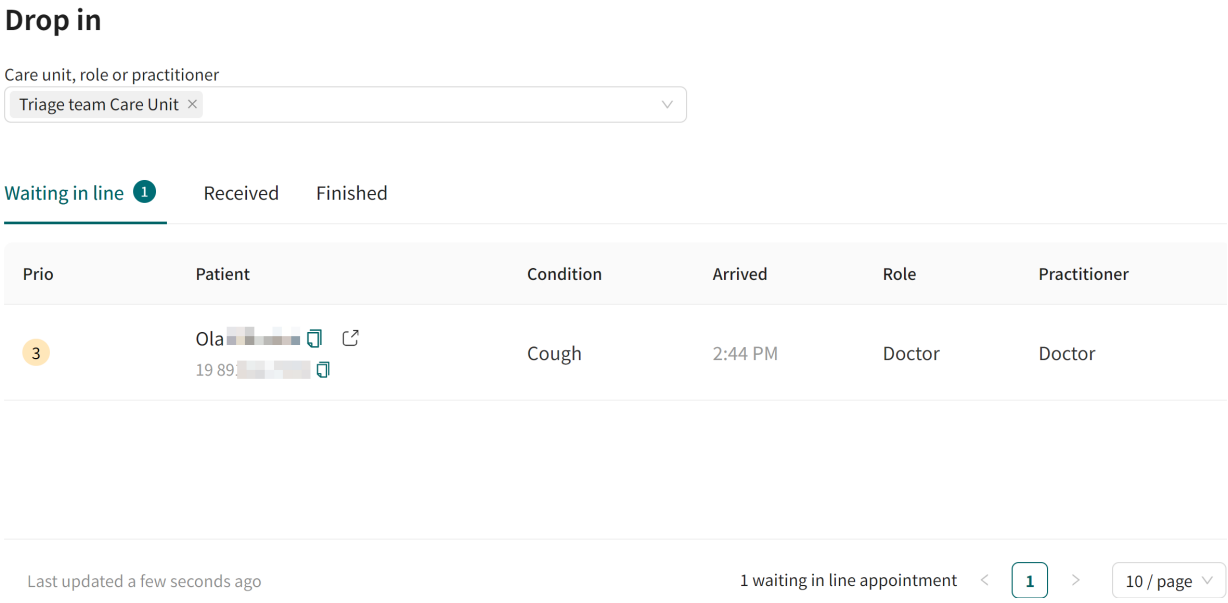
The tab order correlates to a left-to-right workflow that is used in this view.

Use **My visits** or the advanced filter to filter the content in the tabs. You can also filter on visits to your role (for example **Visits assigned to Doctor**).

10.6.1. Waiting in line

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

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



IMPORTANT

If your care unit's drop-in flow(s) include triage, each new drop-in visit is assigned a priority. The visits in the list are then sorted by this priority, with visits of the highest priority (priority 1) shown at the top.

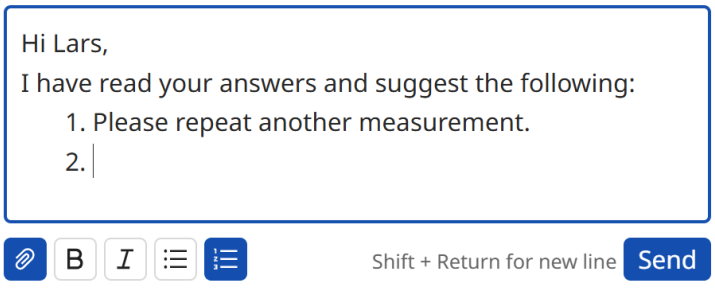
Visits with the same priority are also sorted by arrival time, with the patient who has been waiting the longest in the waiting room shown at the top. If triage is not enabled – and the visits have no priority – the list is sorted only by arrival time, with the patient who has been waiting the longest in the waiting room shown at the top.

A common way of working is therefore to process incoming visits in the drop-in list from top to bottom. However, always make sure to follow your care unit's routines regarding how quickly and in what order the drop-in visits in the list should be received and handled.

10.6.2. Manage an ongoing drop-in visit

During an ongoing drop-in visit in Clinic, you have access to a number of different features and tools you can use during the digital visit.

Type your message in the text field at the bottom of the chat. When you are done, you can send the message by clicking the **Send** button or `Enter` on your keyboard.



TIP
Add various formats to the chat message to make it clearer and easier to read for the recipient. You can use the buttons below the text field for bold and italic, as well as add bulleted or numbered lists.

If you want to create a line break without sending the message, press `Shift` + `Enter` on your keyboard.

Click the camera icon ( ) above the chat to start a video call with the patient. Ongoing and completed video calls are displayed with a message showing how long they took and who was in them. For more information about video calls, see Initiating a video call with the patient in the chat [164].

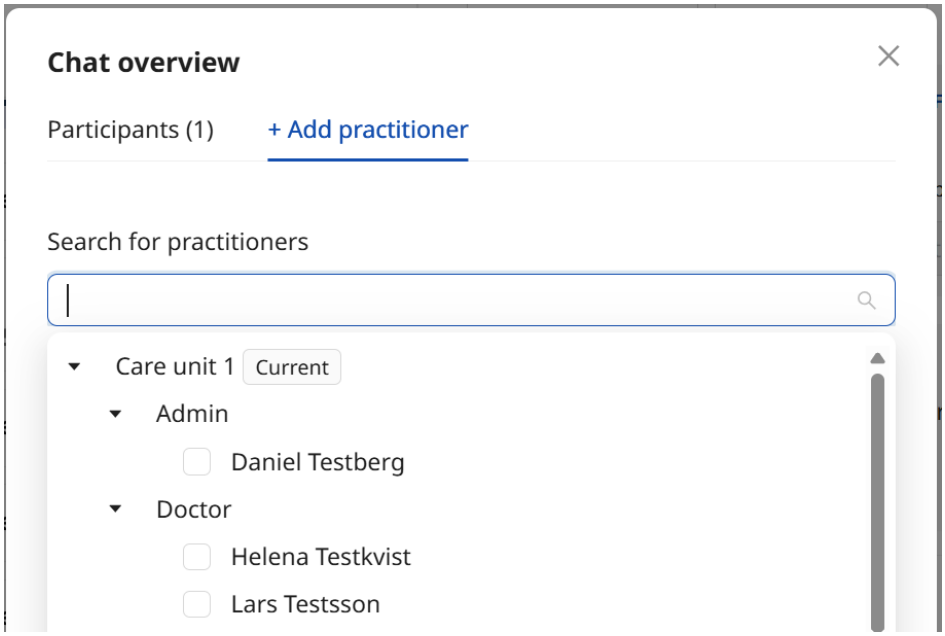
For more options and tips during an ongoing visit, see Chat module [108].

It is also possible to hand over the ongoing visit to a colleague. For more information, see Handing over during an ongoing visit [173].

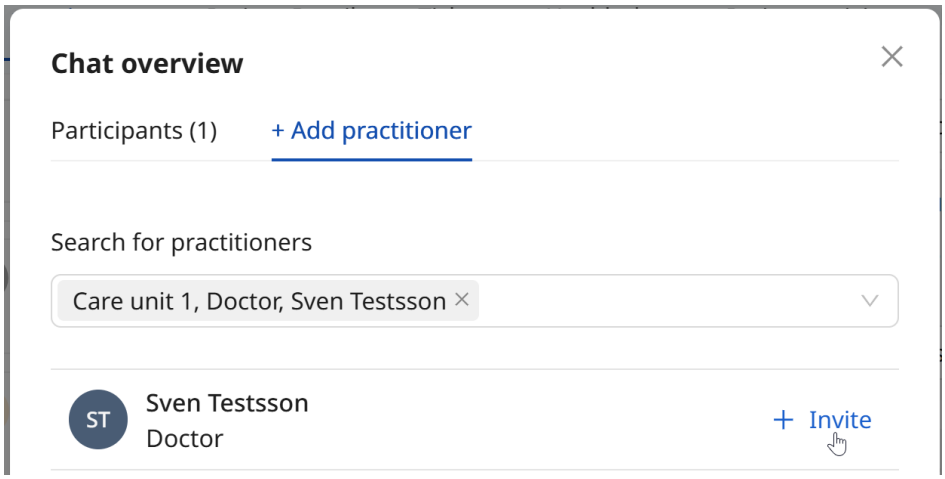
10.6.3. Manage participants in an ongoing visit

Invite a colleague as a guest

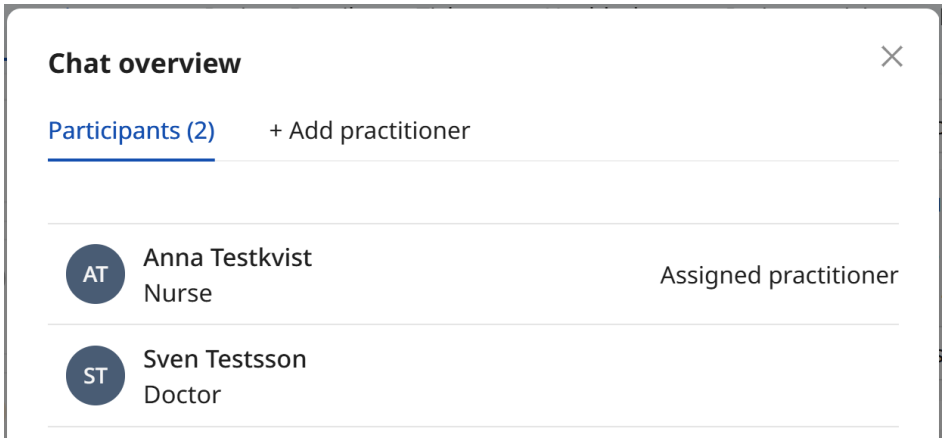
1. Click on the participants icon ( ) above the chat in the ongoing visit. This opens the **Chat overview**.
2. Use the resource selector to add the desired colleague.



3. Hover over the selected participant and click **Invite**.

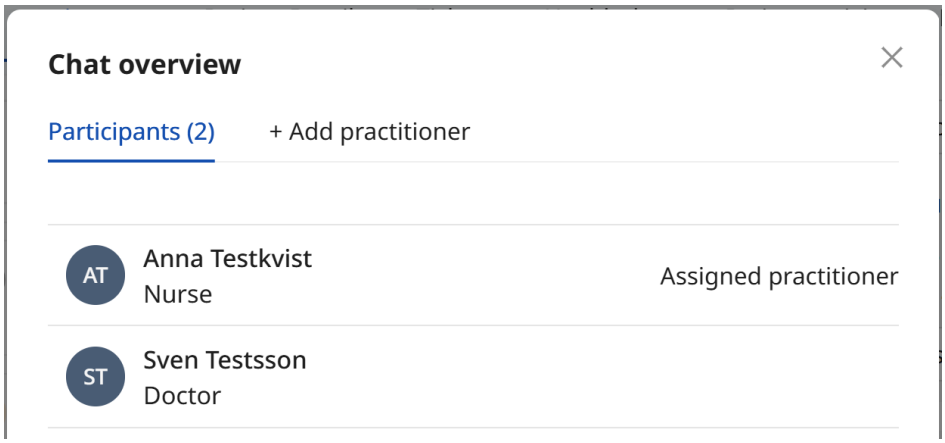


4. The invited participant is now also shown in the **Participants** list.

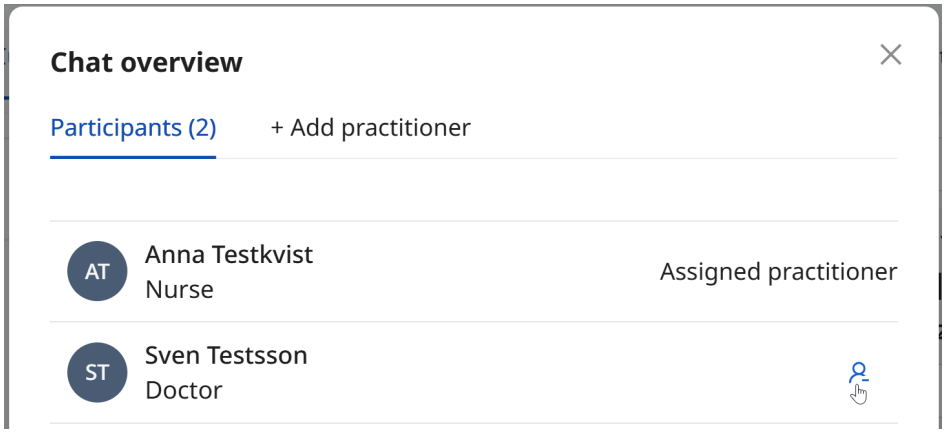


Remove an invited colleague

1. Click on the participants icon ( ) above the chat in the ongoing visit. This opens the **Chat overview**.
2. Click on the **Participants** tab.

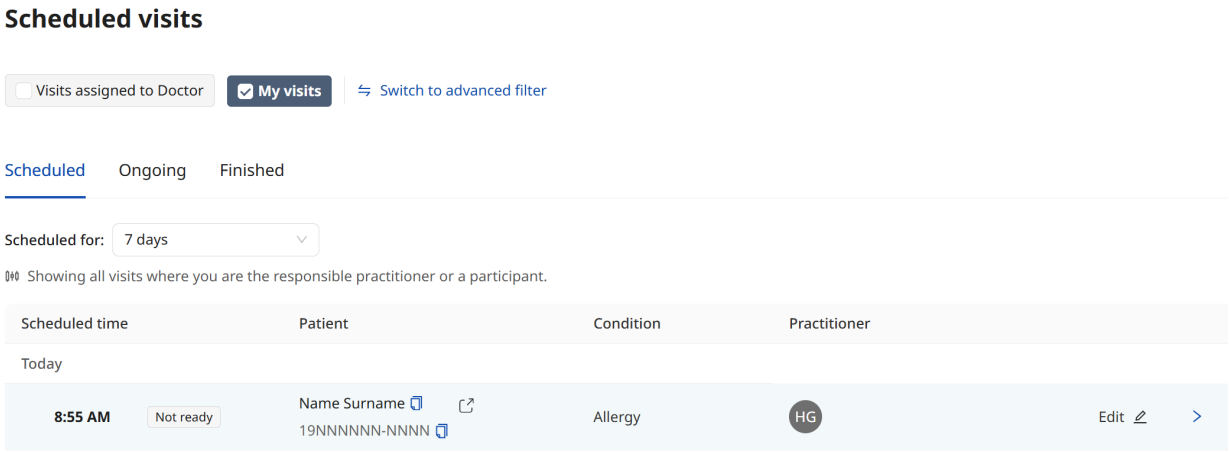


3. Hover over the selected participant and click on the remove participant ( ) icon.



10.7. Scheduled visits

Click **Scheduled visits** in the main menu to go to the **Scheduled visits** view. In this view, scheduled patient visits are managed.



The **Scheduled visits** view contains three tabs:

- **Scheduled**: Here you can see scheduled visits that have not yet been received by practitioners. Visits are sorted by the scheduled start time. It is possible to set whether you want to see visits scheduled during a specific time period, for example, "Today", "7 days" or "30 days".
- **Ongoing**: Here you can see scheduled visits that are currently in progress, that is, those that have been received by practitioners. Visits are sorted by the scheduled start time.
- **Finished**: Here you can see drop-in visits that have been completed within the chosen date range. The default date range is set to show the last 30 days. Visits are sorted by when they were finished.

The tab order correlates to a left-to-right workflow that is used in this view. Click on a row in the list to open the visits page view.

Use **My visits** or the advanced filter to filter the content in the tabs. You can also filter on visits to your role (for example **Visits assigned to Doctor**).

The scheduled visits in Clinic are divided into two types:

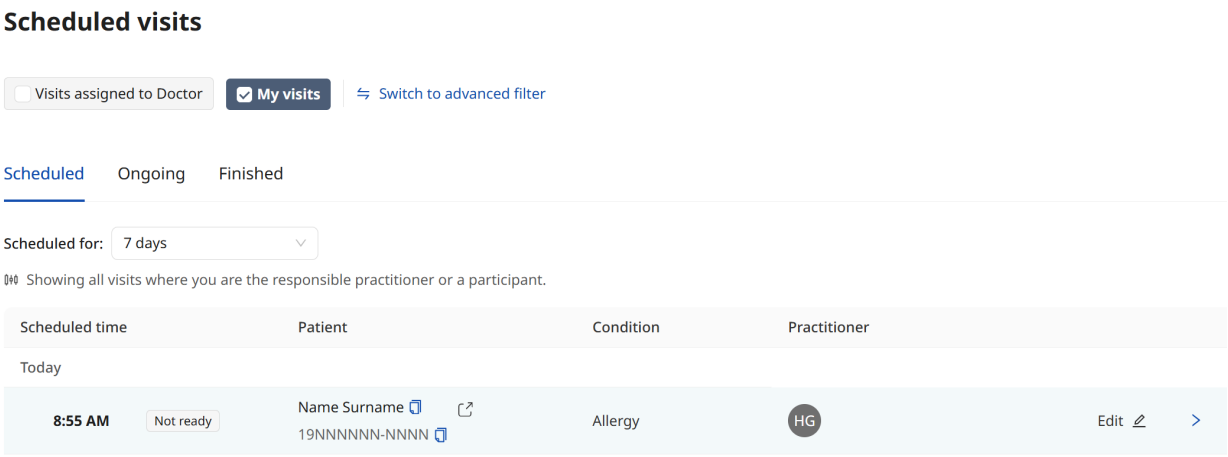
- **Scheduled**
- **Video appointment**

For information on the various visit types and how to book a scheduled visit and a video appointment, see Booking a visit for a patient [140].

10.7.1. Scheduled

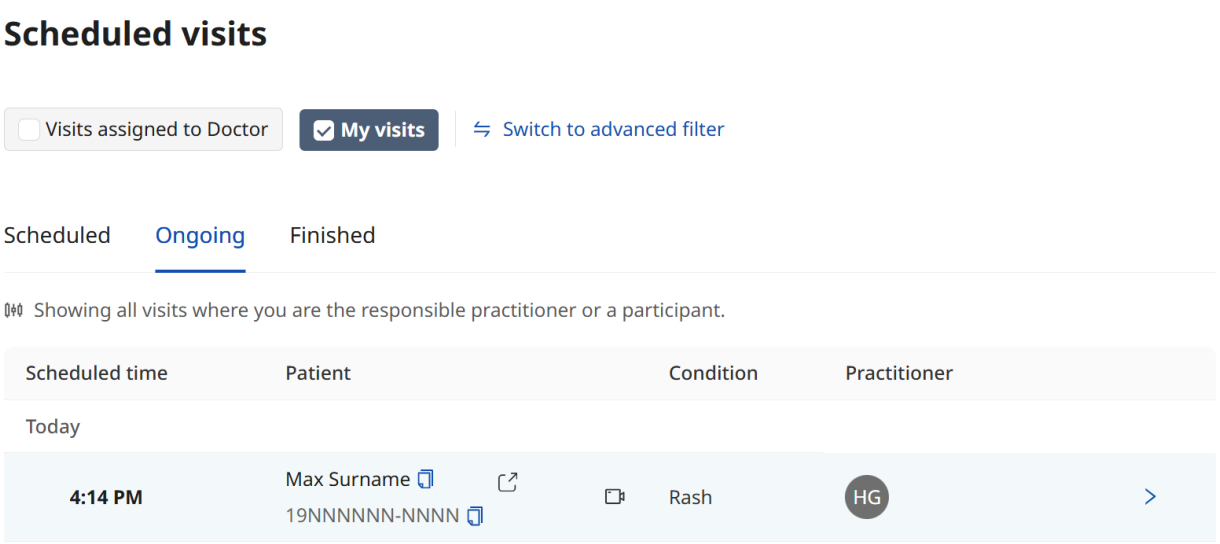
All scheduled patients are listed in the **Scheduled** tab. The number next to the tab name displays the number of scheduled patients based on the selected filters.

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



10.7.2. Ongoing

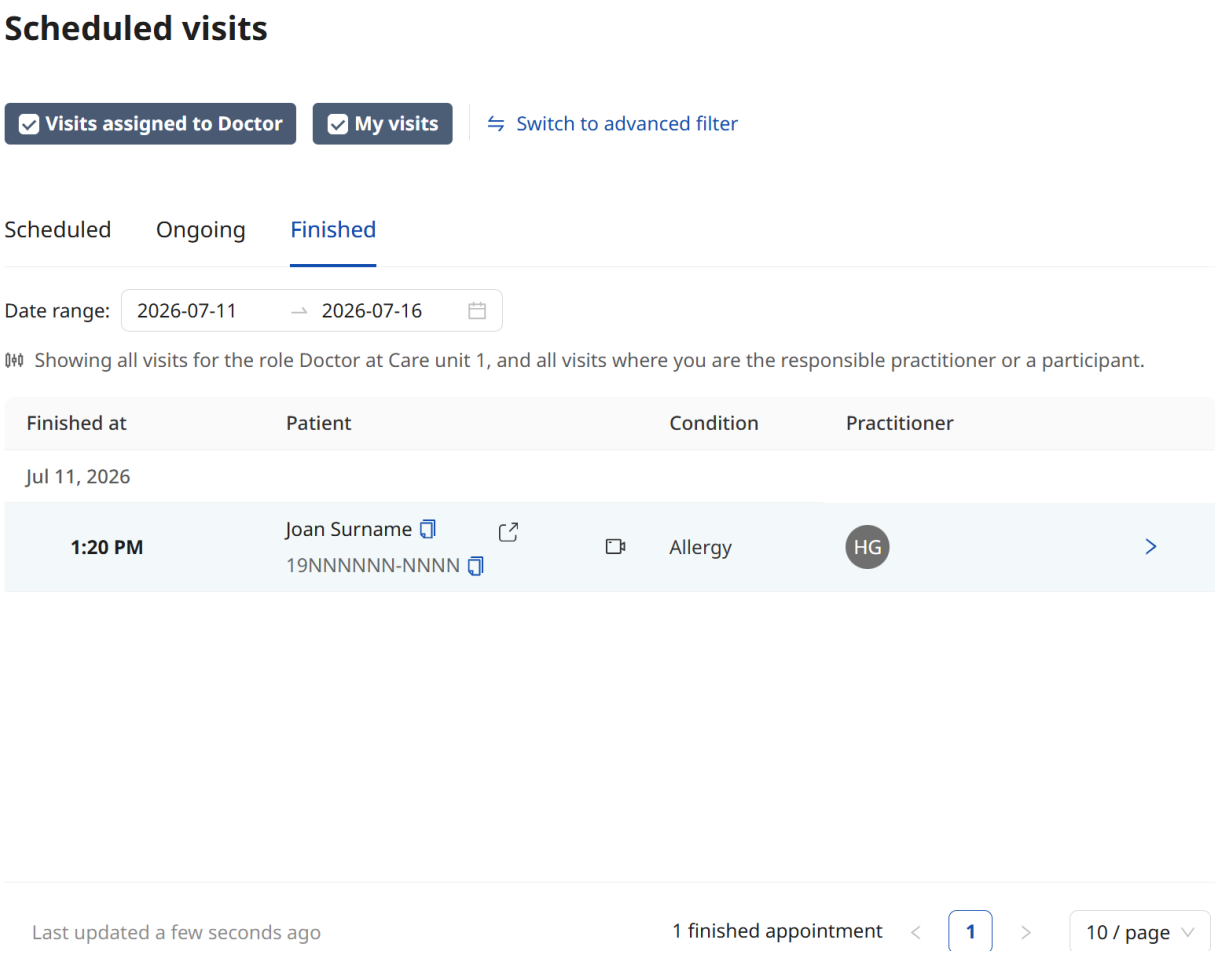
The **Ongoing** tab displays all ongoing scheduled visits and the tab is sorted by when the visits started (latest on top).



10.7.3. Finished

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

In the **Finished** tab, visits are sorted by when they were finished (latest on top). The tab shows visits within the chosen date range. The default date range is set to show the last 30 days.

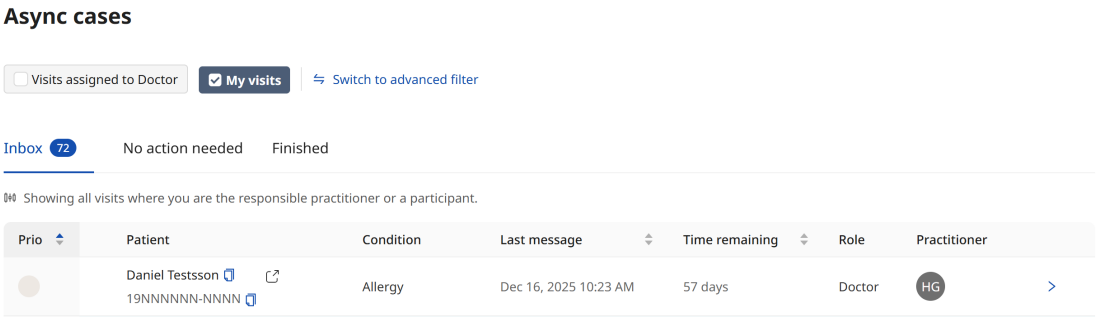


10.8. Asynchronous cases

An asynchronous message is a way to communicate with the patient outside of an ongoing (synchronous) visit.

Since the communication in an asynchronous case does not happen in real time, both parties receive a notification each time a new message is received. The patient receives an SMS informing them that a new message has been received in the Patient app, and for the practitioner, the message appears as a new case in the **Inbox** for asynchronous cases.

Click **Async cases** in the main menu to go to the **Async cases** view.



The **Async cases** view contains three tabs:

- **Inbox**: Here you can see ongoing asynchronous cases that contain unread/unhandled messages. The cases are sorted by priority (if applicable) and arrival time. Priority 1 is the most urgent.

- **No action needed**: Here you can see ongoing asynchronous cases that currently do not contain any unread/unhandled messages. The cases are sorted by priority (if applicable) and arrival time.
- **Finished**: Here you can see asynchronous cases that have been completed in the chosen date range. The default date range is set to show the last 30 days. The cases are sorted by when they were finished.

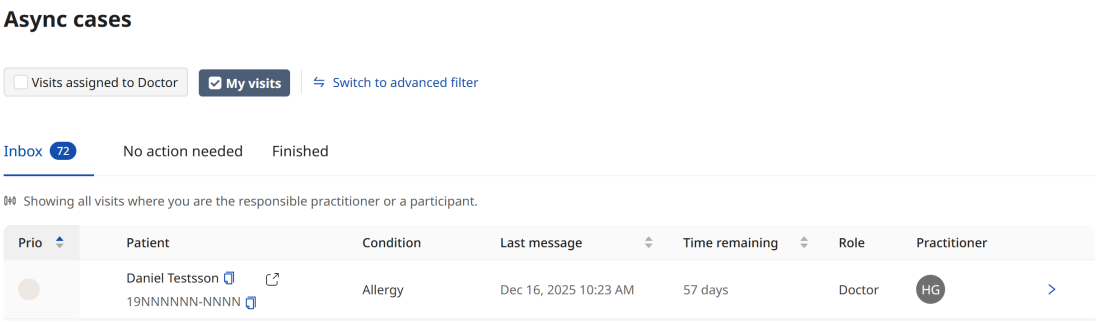
The tab order correlates to a left-to-right workflow that is used in this view.

Use **My visits** or the advanced filter to filter the content in the tabs. You can also filter on visits to your role (for example **Visits assigned to Doctor**).

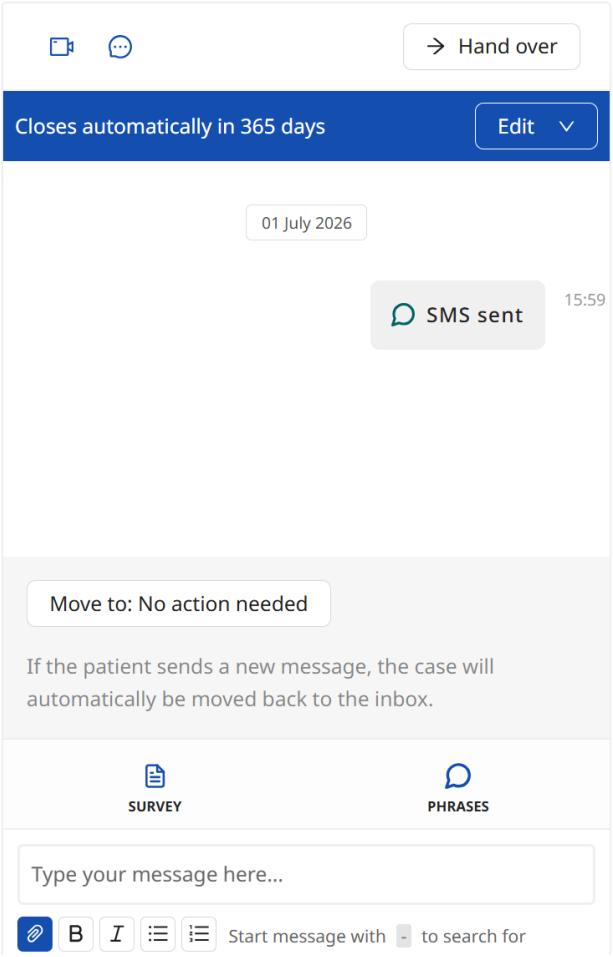
10.8.1. Inbox

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

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



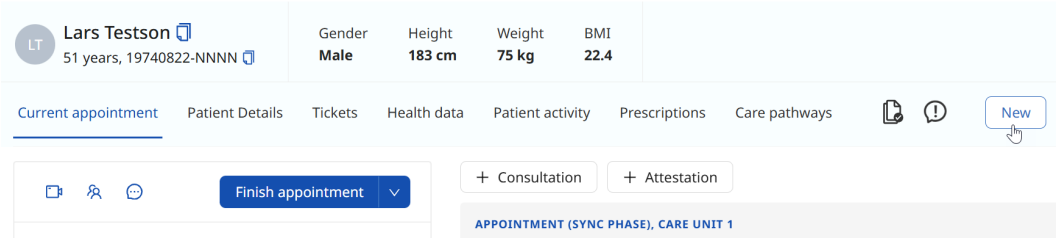
Click on a row in the list to open the visits page and either reply to the patient or finish the case (use the **Move to: No action need** button in the chat).



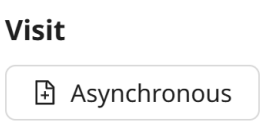
10.8.2. Starting a new asynchronous case

In order to send asynchronous messages to a patient, you need to start a new asynchronous case:

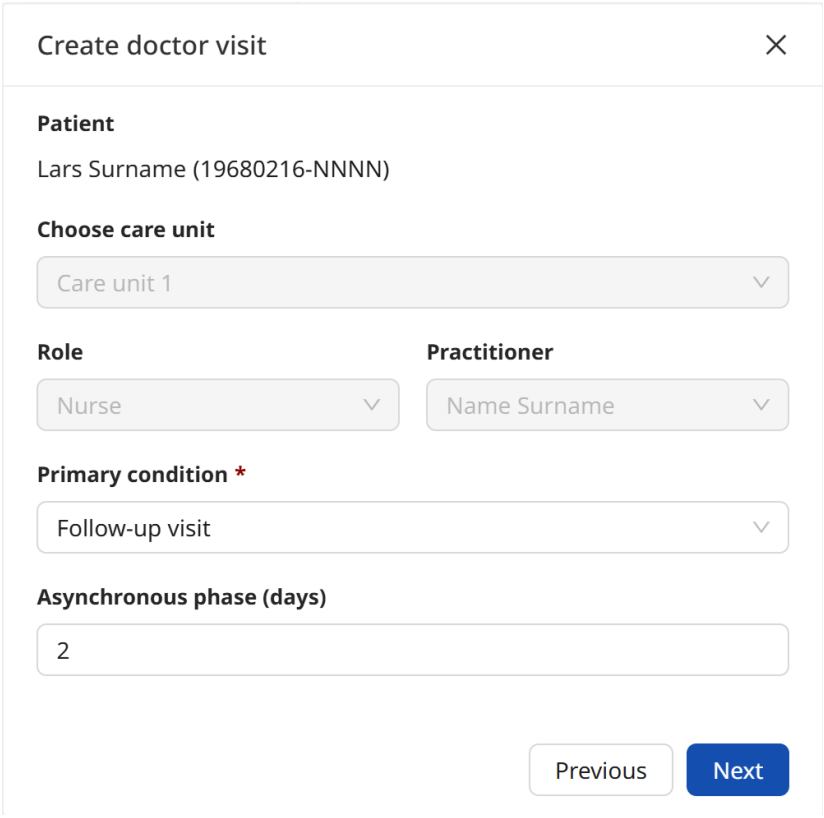
1. Click the **New** button in upper right part of the patient's visit page.



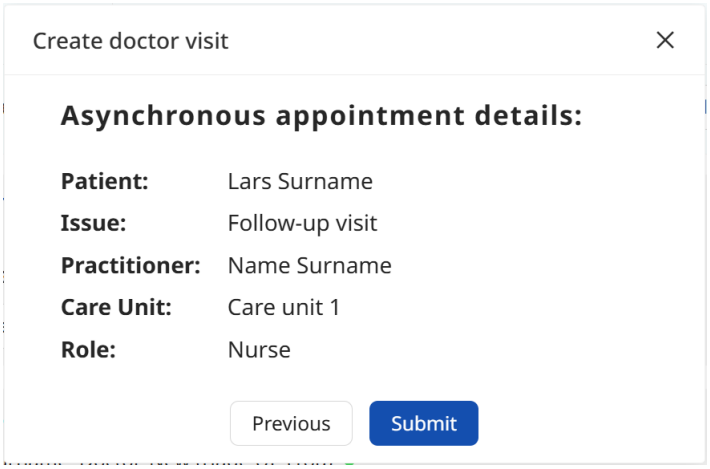
2. Select visit type **Asynchronous**.



3. Use the preset **Primary condition** for the case – if available – or select a new one by choosing one of the predefined options. The case's primary condition is displayed as a heading for the case and is shown to the patient (or guardian) in the Patient application.

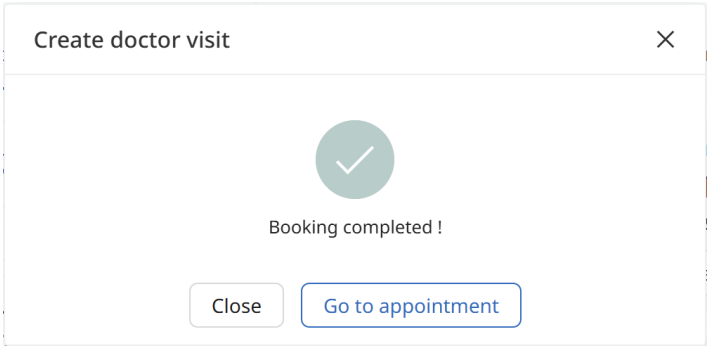


4. Enter the duration of the asynchronous phase and click **Next**.
5. Click **Submit**.

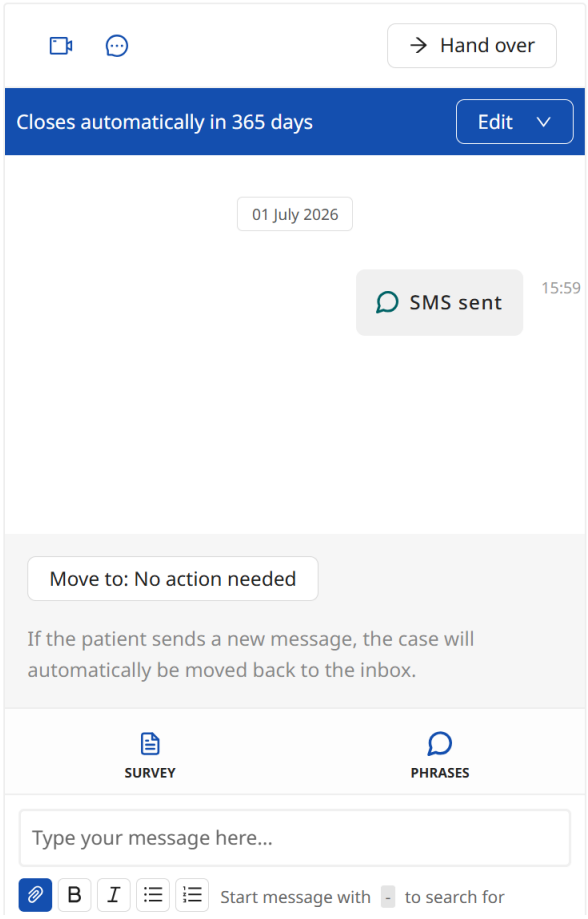


NOTE
An SMS notification is sent to the patient (or to a guardian, if the case concerns a child) informing them that a new case is available in the Patient app. The asynchronous case that has just been created does not yet contain any content, so you need to continue directly by writing your message, as described in the following steps.

6. Click the **Go to appointment** button.

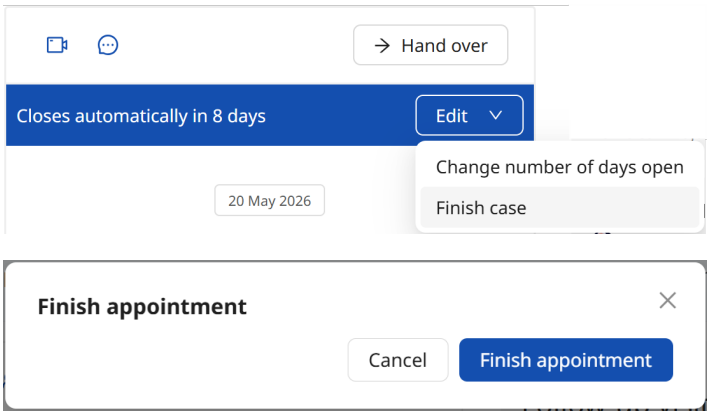


7. In the chat module, write and send the message to the patient.
   By typing a reply in the chat or clicking **Move to: No action needed**, the visit disappears from the log. Each time the patient writes in the chat, the case is activated and reappears in the **Inbox** in the **Async cases** view.



   In the top of the chat module, it is displayed how much time patient has left to answer. This information is not shown to the patient.

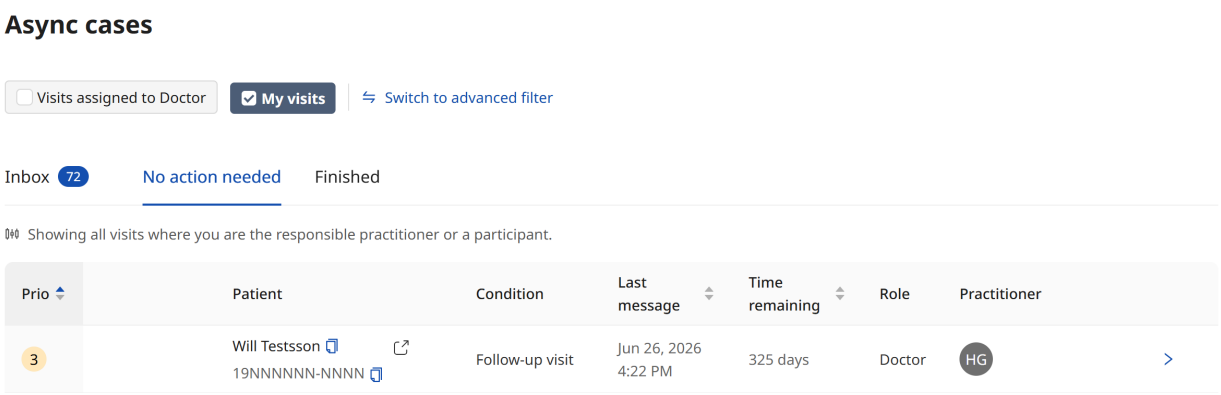
8. If you want to end the asynchronous phase before it expires, click **Edit** and select **Change number of days open**, or click **Finish case** in the dialog that appears to confirm the ending of the asynchronous phase.



10.8.3. No action needed

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

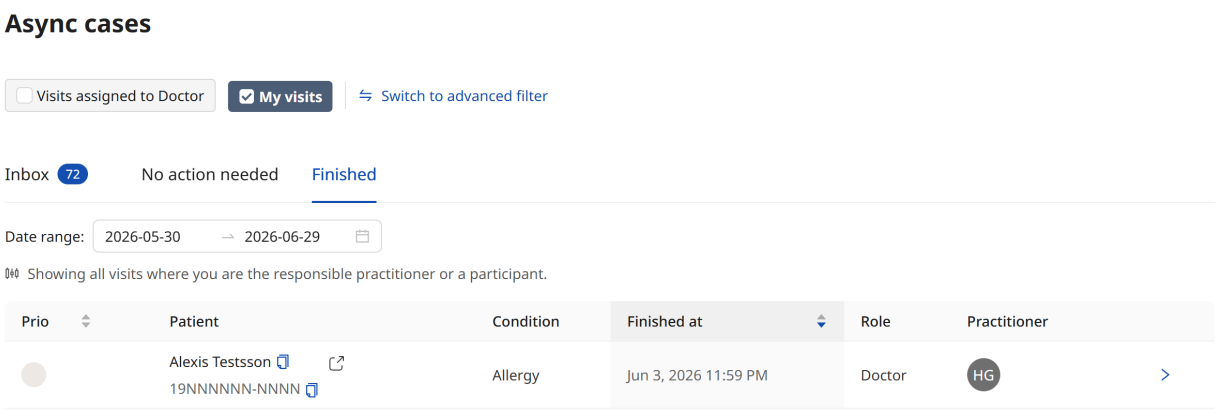
The **No action needed** tab is sorted on when the last message was sent in the chat (oldest on top).



10.8.4. Finished

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

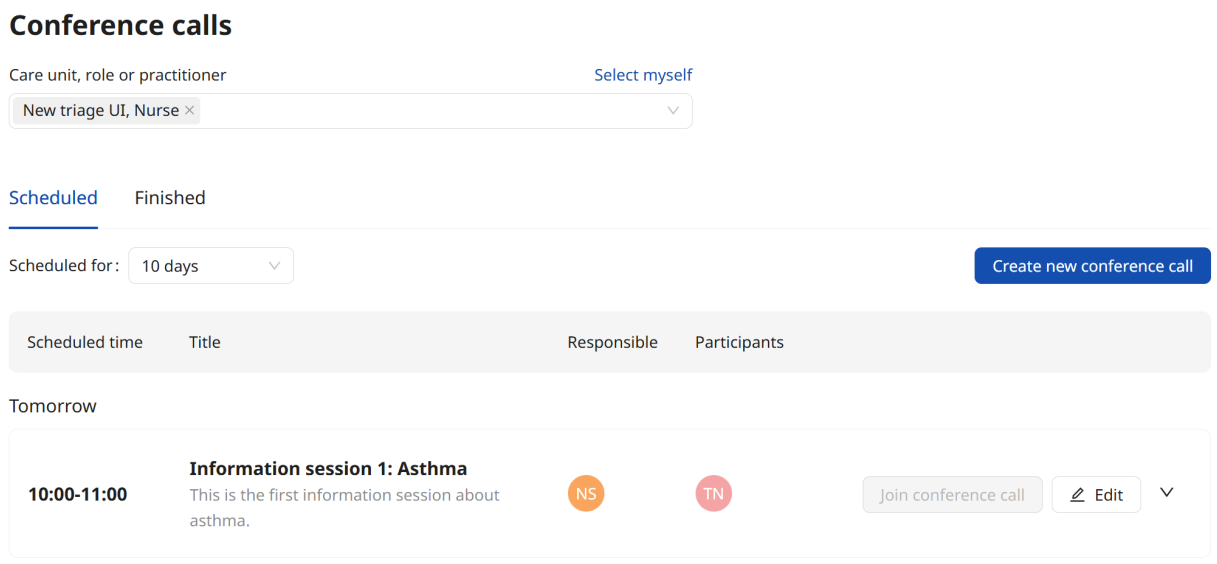
The **Finished** tab is sorted on when the asynchronous cases were ended (latest on top). The tab only shows asynchronous cases that were finished in the last 30 days.



10.9. Conference calls

Click **Conference calls** in the main menu to go to the **Conference calls** view. In this view, you can manage conference calls with several patients, practitioners and/or external guests as participants.

While other visit types in the platform has one patient per meeting in focus, a conference call has a topic as its focus instead. This means that multiple patients can participate in a conference call, in addition to practitioners and external participants.



In the **Conference calls** view, there are two tabs:

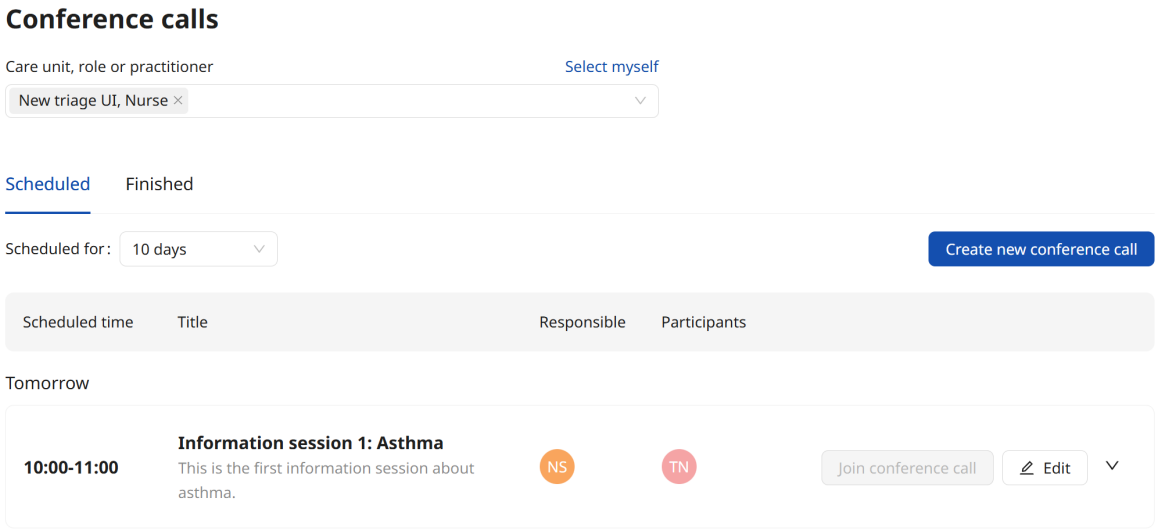
- **Scheduled**: In this tab you can see upcoming (not yet started) and ongoing conference calls. The calls are sorted by the scheduled start time. By changing the value in the **Scheduled for** field, you can set whether you want to see conference calls scheduled for a specific time period: "10 days", "30 days" or "All".

- **Finished**: In this view you can see conference calls that have been finished during the last 30 days. After 30 days, the conference calls disappear from this tab, but you can find them by going to the patient's profile. Conference calls are sorted by closing time.

In a conference call, there is a responsible practitioner that leads the conference call. All participants can see who the responsible practitioner is and you can change the responsible practitioner up until the conference call starts. Note that any practitioner added as a participant in the conference call can start the call together with the other participants.

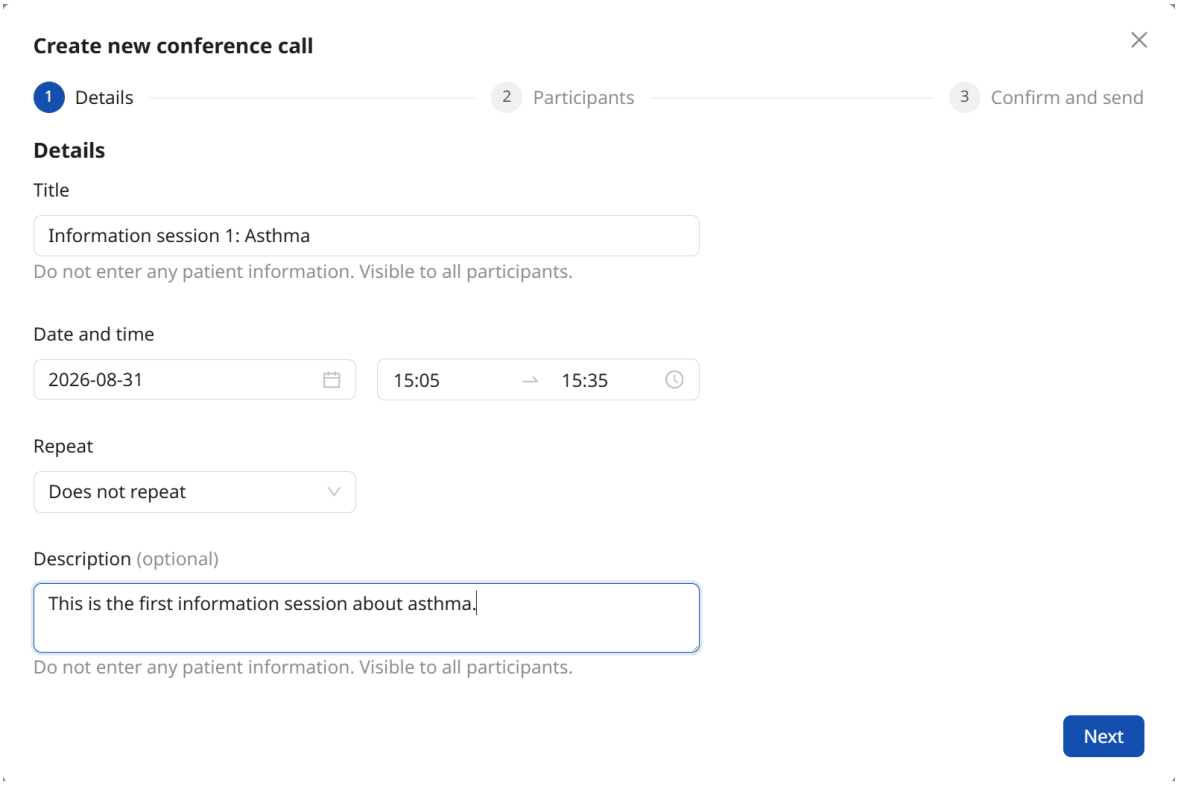
10.9.1. Schedule a new conference call

1. Click the **Create new conference call** button located at the top right of the **Scheduled** tab.



2. Enter the details about the conference call:
   - **Title**: Conference call title.
   - **Date and time**: Select a date as well as a start time and end time.
   - **Repeat**: Schedule reoccurring meetings if needed.
   - **Description**: An optional meeting description can be added.

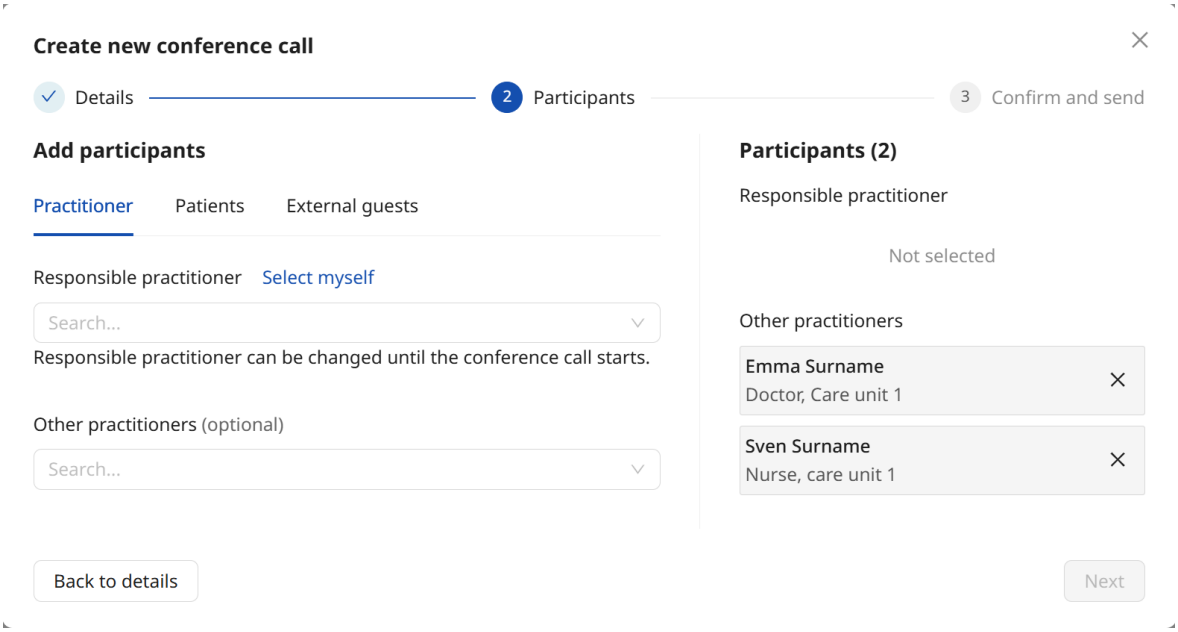
> **IMPORTANT**
> Do not enter any patient information in the **Title** or **Description** as this is visible to all participants.



3. Click **Next**.
4. In the **Practitioner** tab, add the practitioners that should be invited. Select the practitioner that will be responsible for the conference call in the **Responsible practitioner** list (mandatory). You can select yourself by clicking the **Select myself** button. and also search for other practitioners to add in the **Other practitioners** field.

   In the same tab, also search for other practitioners to add in the **Other practitioners** field.

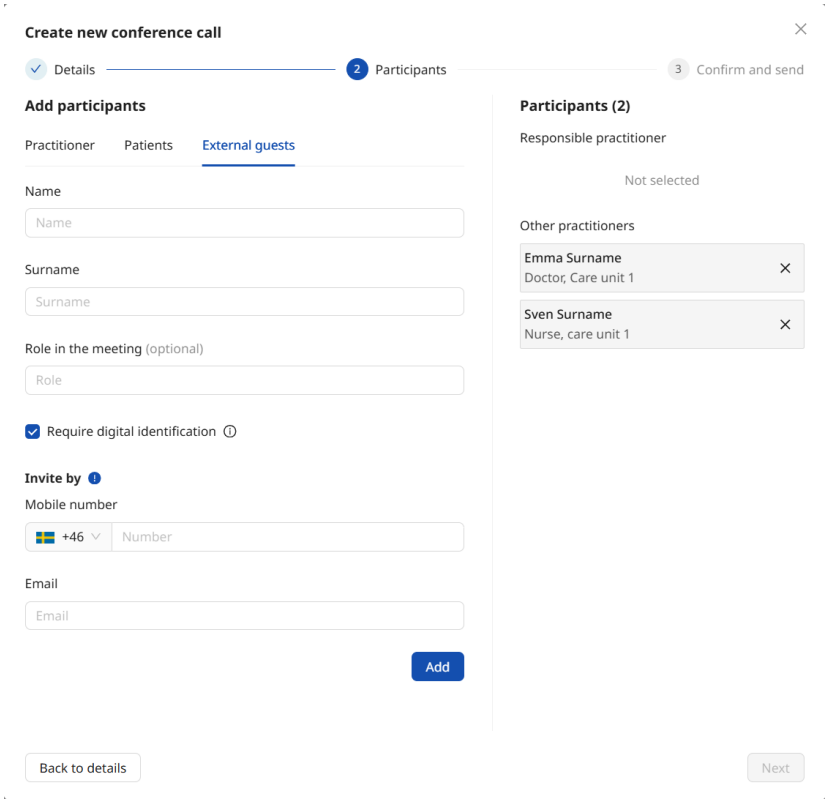
> **NOTE**
> All added practitioners can start the conference call together with the other participants. It does not have to be the responsible practitioner that starts and conducts the meeting.



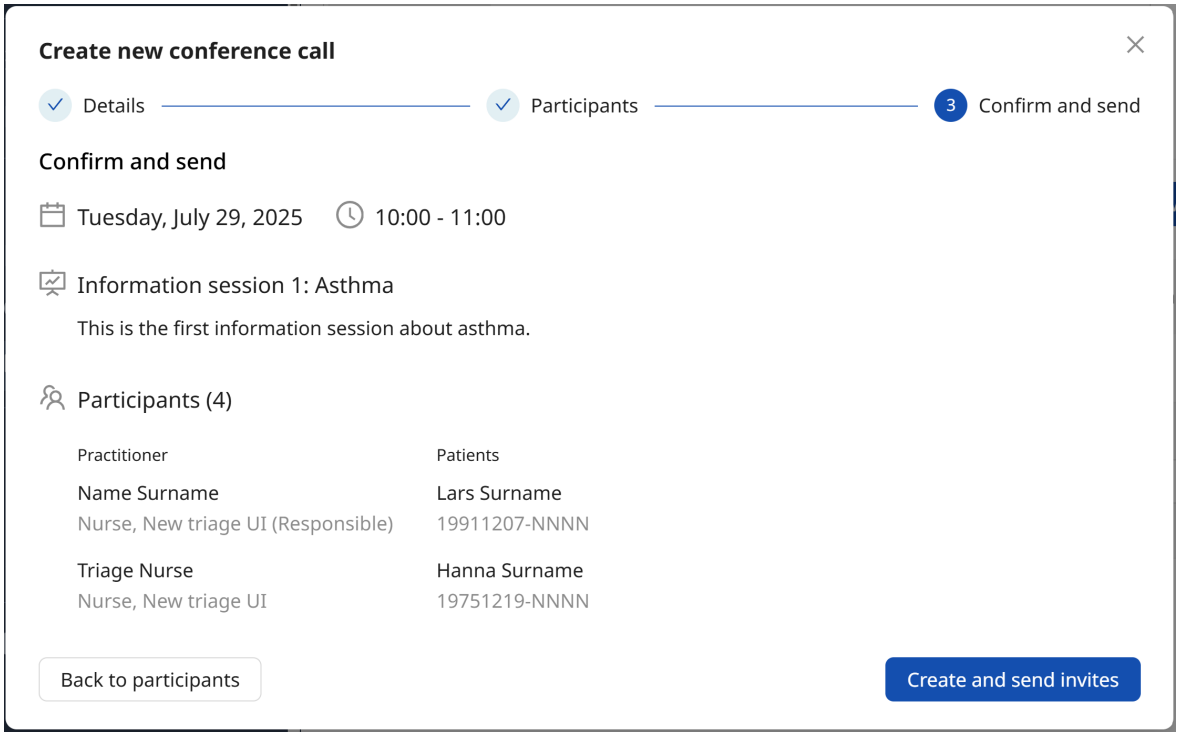
5. In the **Patients** tab, select the patients to be included in the conference call (search by name or personal number).

> **NOTE**
> If a child is added as a patient in a conference call, the invitation to the call will be sent to all of the child's registered guardians on the platform. Who is registered as the child's guardian is visible in the booking, both when you search for the child and then also in the participant list for the booking.

6. In the **External guests** tab, you can add external guests (e.g., an interpreter) if desired. The contact details you enter determine how the guest is invited to the conference call – via SMS and/or email.



7. When all participants (practitioners, patients and external guests) have been added, click **Next**.
8. Confirm that that the summary is correct. If yes, click the **Create and send invites** button.

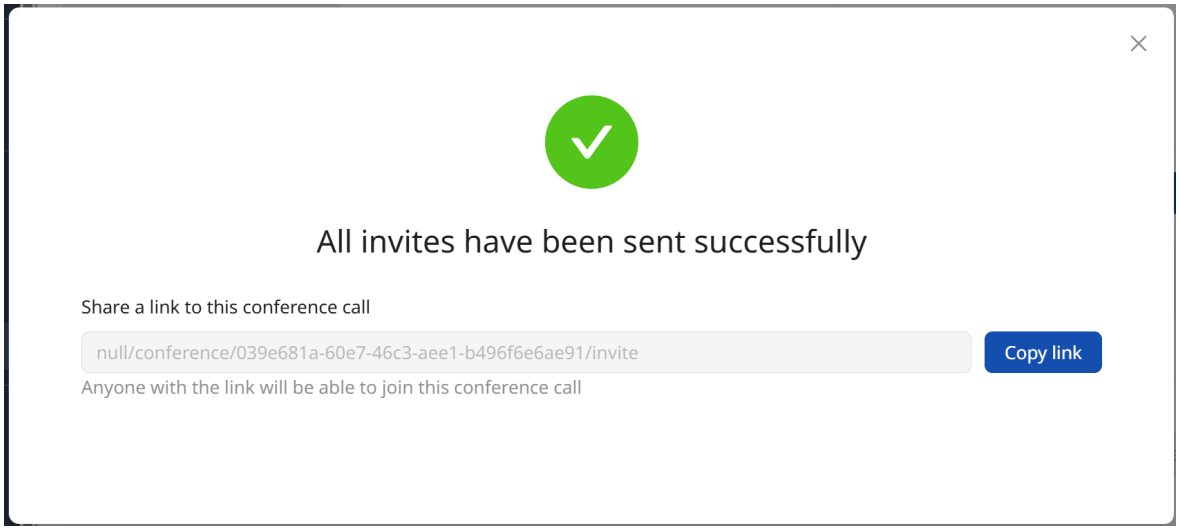


As a result, a booking confirmation is sent via text message to each patient (or guardian, if the patient is a child) and the conference call becomes visible to the patient (or guardians) in the Patient application.

An invitation is also sent via SMS and/or email to the external guests added to the booking. Each external guest will receive their own unique link to the conference call.

For practitioners, the conference call will be visible in the **Conference calls** view in Clinic.

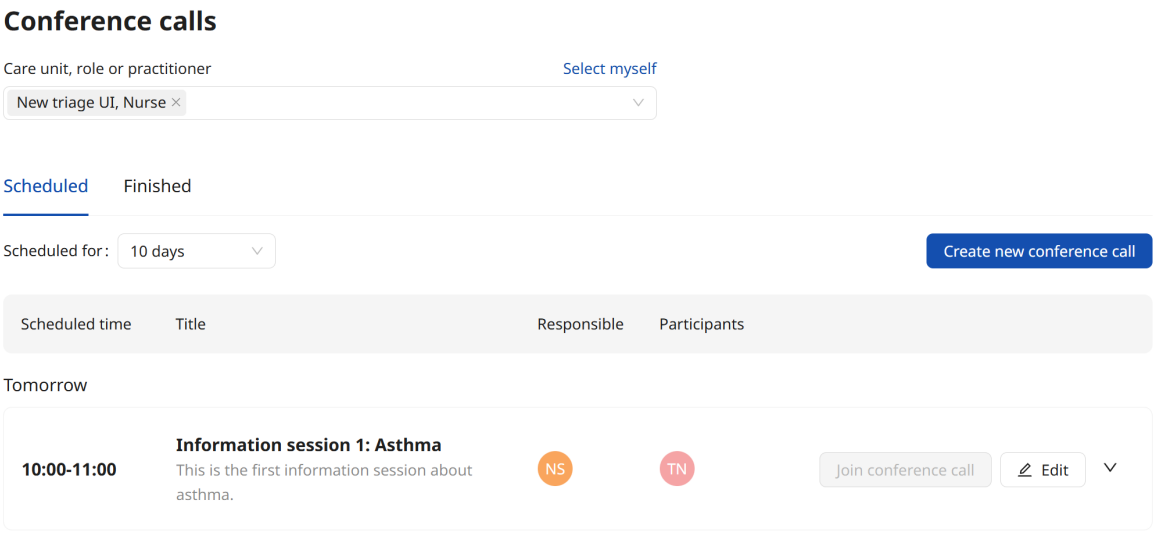
9. After clicking the **Create and send invites** button, a confirmation dialog will appear with a general link to the conference call. Anyone who receives this link can use it to register themselves as an external guest for the conference call.



10.9.2. Schedule multiple, identical conference calls

If you wish to book several similar conference calls in succession, you can book a new conference call in Clinic by creating a copy of an existing conference call. All call details and the participant list will then be copied to the new call.

1. Find the conference call you want to copy by, for example:
   - Use the global resource filter (Global resource filter [20]) to filter out the conference calls that you are responsible for or that you have been invited to as a participant.
   - Select the **Scheduled** tab (or **Finished** tab if you want to copy a completed conference call).
   - Select the time span for which you want to see conference calls, for example, 10 days.
   - Find the conference call in the filtered list.

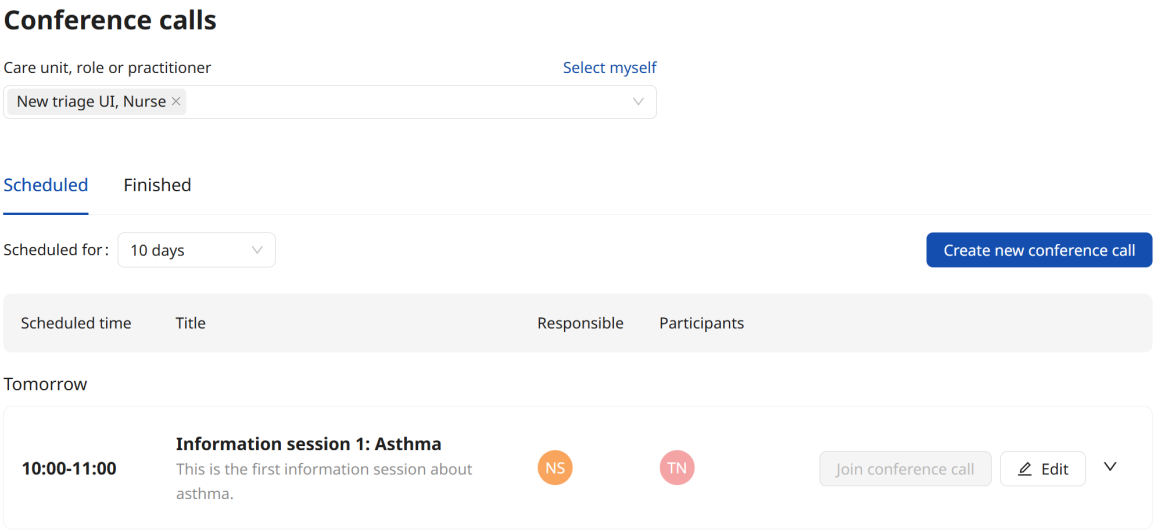


2. Click **Edit** on the row of the conference call you want to copy, then click **Create copy**.
3. Schedule the new conference call by following the instructions in Schedule a new conference call [63].

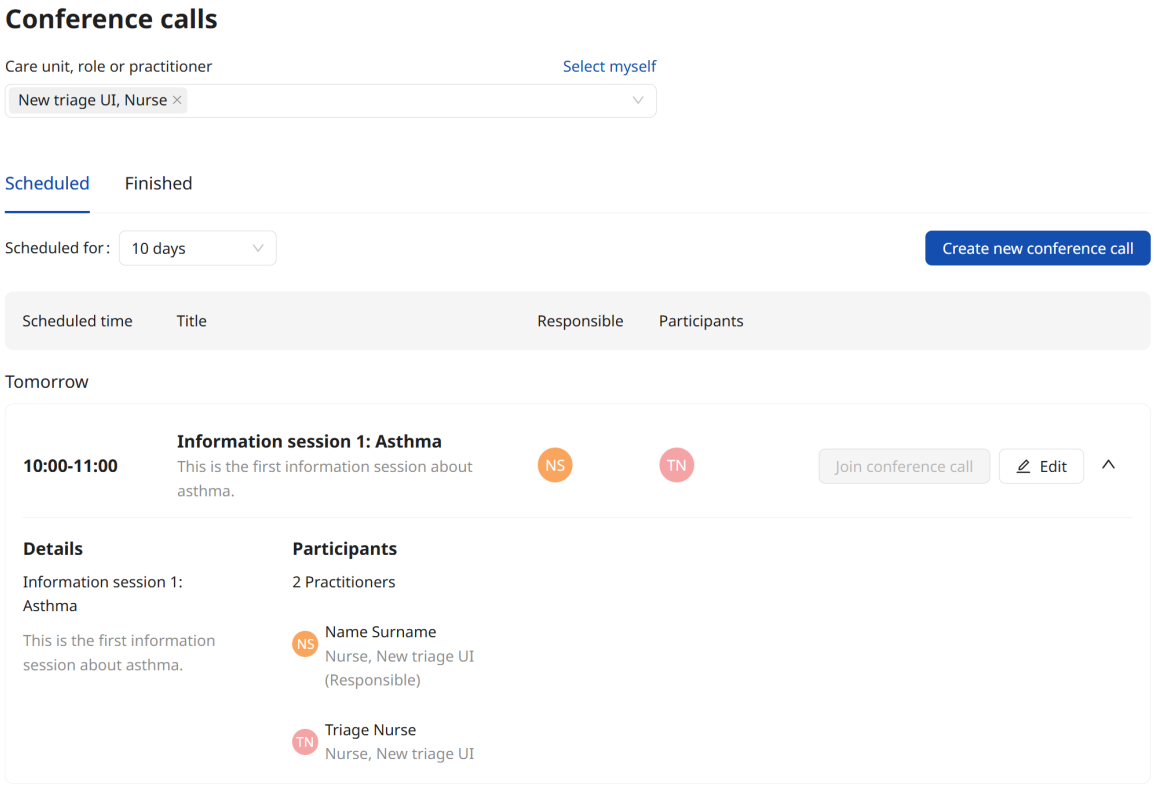
> **NOTE**
> Do not forget to change the date and time of the new conference call.

10.9.3. Perform a conference call

1. If desired, make a selection of a care unit, role, practitioner or yourself in the global resource filter (Global resource filter [20])
2. In the **Scheduled** tab, find the conference call you want to join from the list. You can select a time span to further filter the list.



3. To view more details about the conference call before joining, click the arrow at the end of the row.

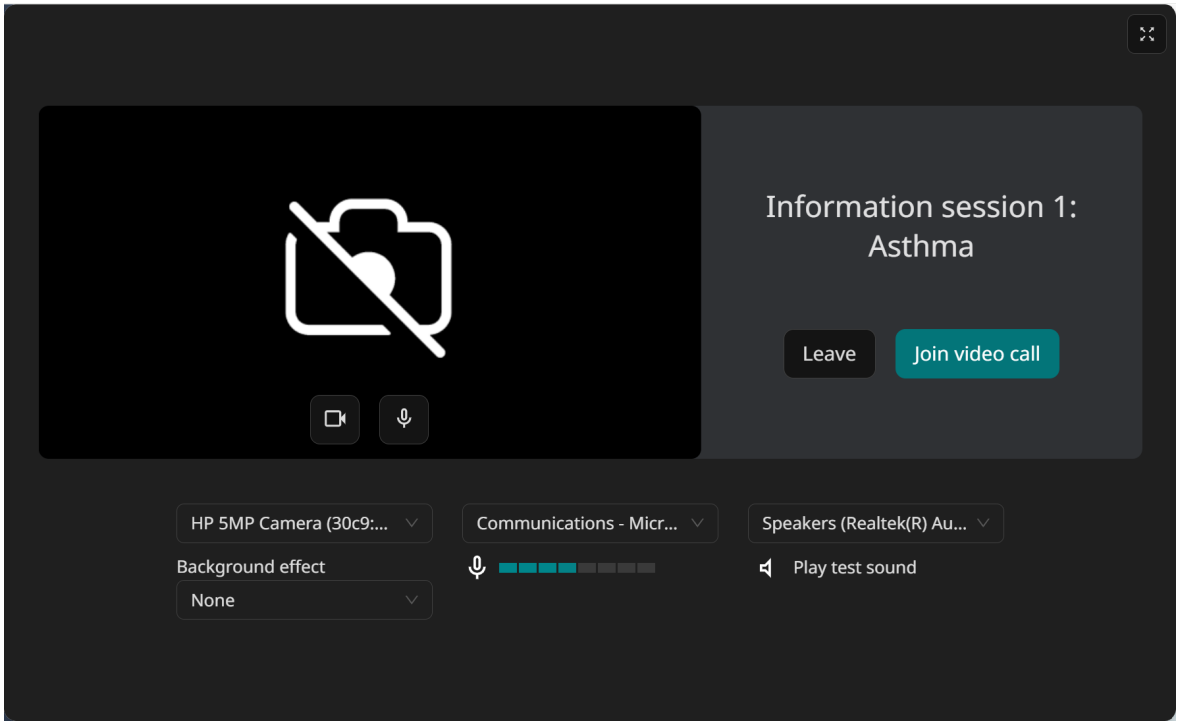


4. At the start time of the conference call, click the **Join conference call** button. Note that the button only is active 10 minutes before the call starts.

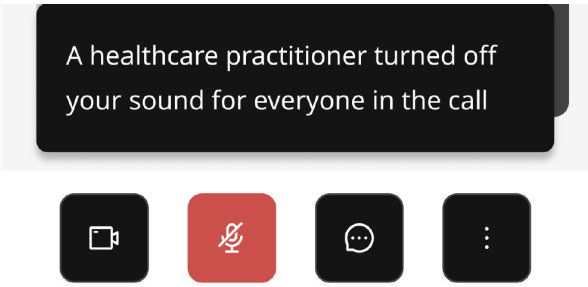


5. Follow the upcoming instructions to approve that your camera and microphone can be used by your web browser. You only need to approve once. The settings will then be saved for future use.

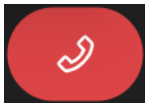
6. Before joining the conference call, you can adjust settings for the camera, microphone and speakers. You can also add a background effect such as an image or a blurry background.



7. Click the **Join video call** button to confirm all settings and to join the conference call.
   During the conference call, the same settings as described in section Initiating a video call with the patient in the chat [164] can be adjusted.
   In addition, as a practitioner you can also mute another participant in the conference call. To mute a participant, click the microphone button either in their video window, or in the participant list. Muted participants receive a notification and can unmute themselves at any time.



8. To exit the conference call, click in the red phone icon.

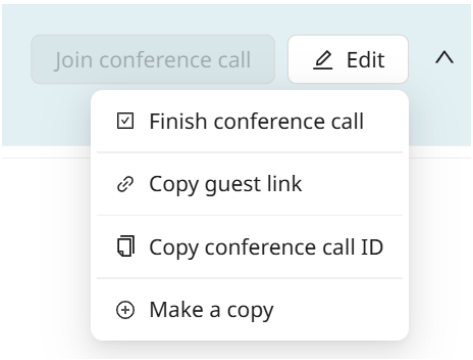


NOTE
Other participants can still remain in the conference call after you exit the call.

If you wish to re-enter the conference call, click the **Join conference call** button again (possible until the end time of the conference call has passed).



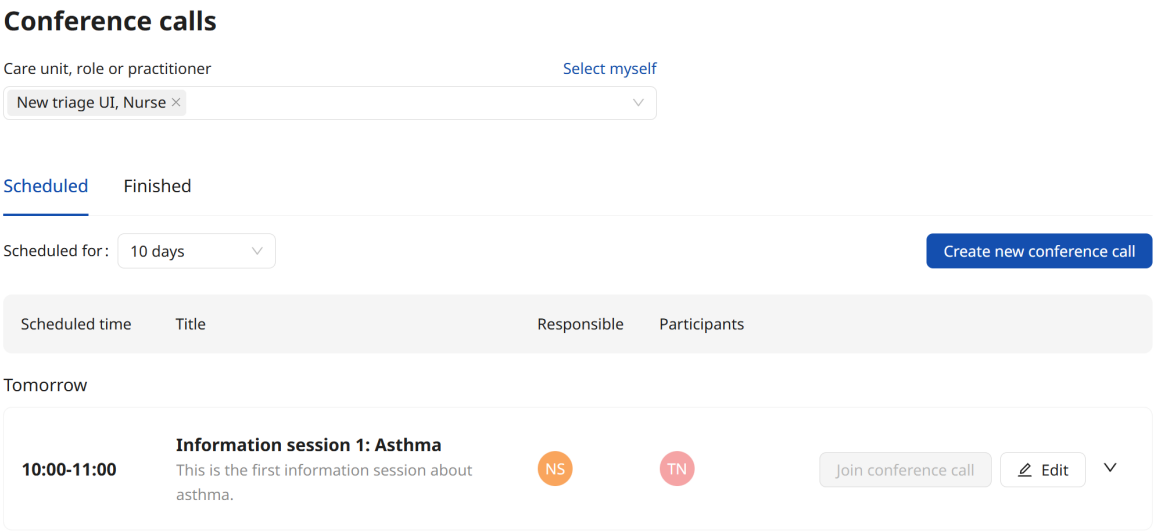
9. To finish the conference call for all participants before the end time has passed, click **Edit** on the conference call row and select **Finish conference call**.



NOTE
After the conference call's scheduled end time has passed, the call will automatically end when all practitioners have left the meeting. You do not need to end the call manually. If any patients or external participants remain in the session at that time, they will be automatically removed from the call.

10.9.4. Edit a conference call

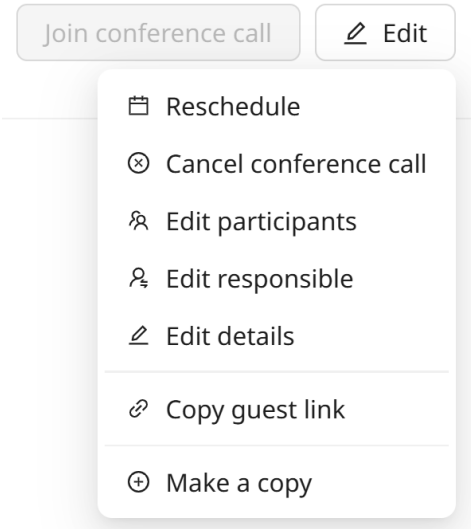
1. If desired, make a selection of a care unit, role, practitioner or yourself in the global resource filter (Global resource filter [20])
2. In the **Scheduled** tab, find the conference call you want to edit from the list. You can select a time span to further filter the list.



3. Click the **Edit** button at the end of the conference call row and select the option that corresponds to what you want to change:
   - **Reschedule**: This option opens the conference call details where the date and time for the meeting can be changed.
   - **Edit participants**: This option allows you to add and remove participants from the conference call.

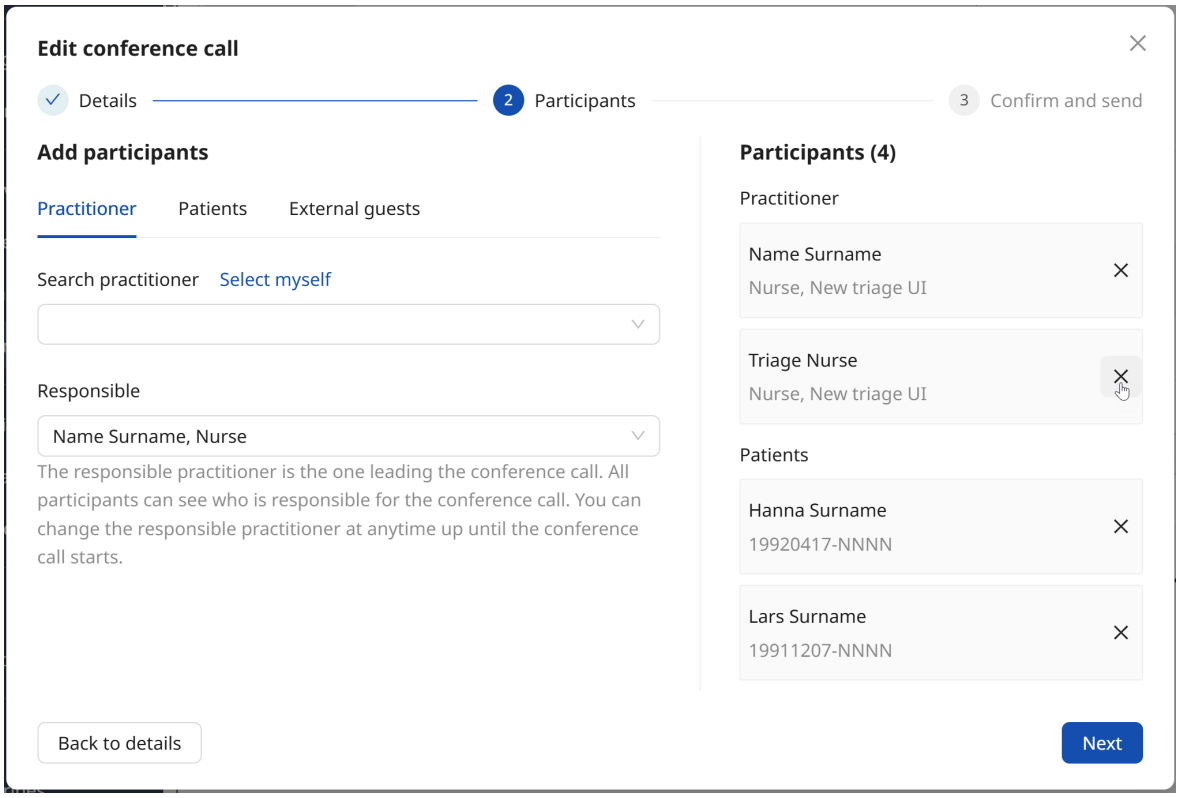
- **Edit responsible**: This option allows you to add and remove practitioners from the conference call, as well as to update the practitioner responsible for the conference call.
- **Edit details**: This option opens the conference call details where the title, description, date and time for the meeting can be changed.

> **IMPORTANT**
> Do not enter any patient information in the **Title** or **Description** as this is visible to all participants.

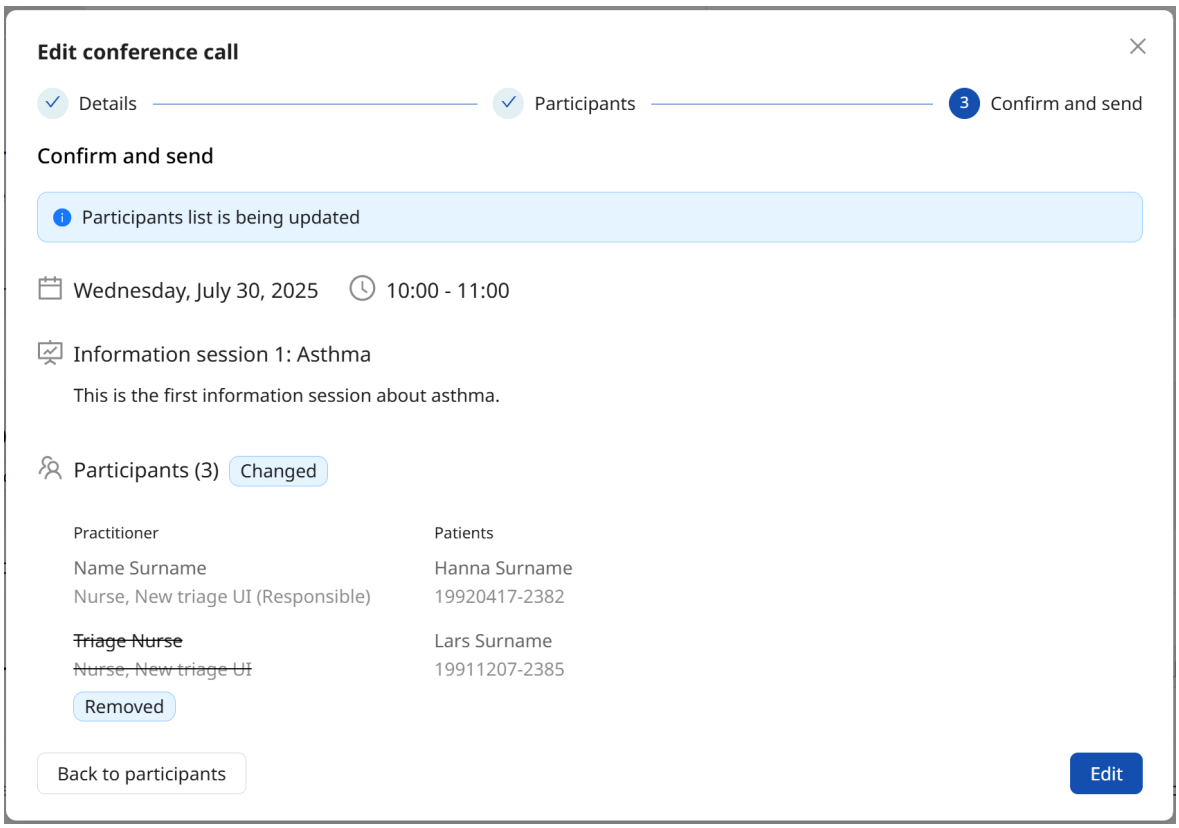


4. After selecting one of the edit options, editing works in the same way as when creating a new conference call. See Schedule a new conference call [63].

5. To remove a practitioner, patient or an external guest, click the "x" next to the name in the **Participants** list.



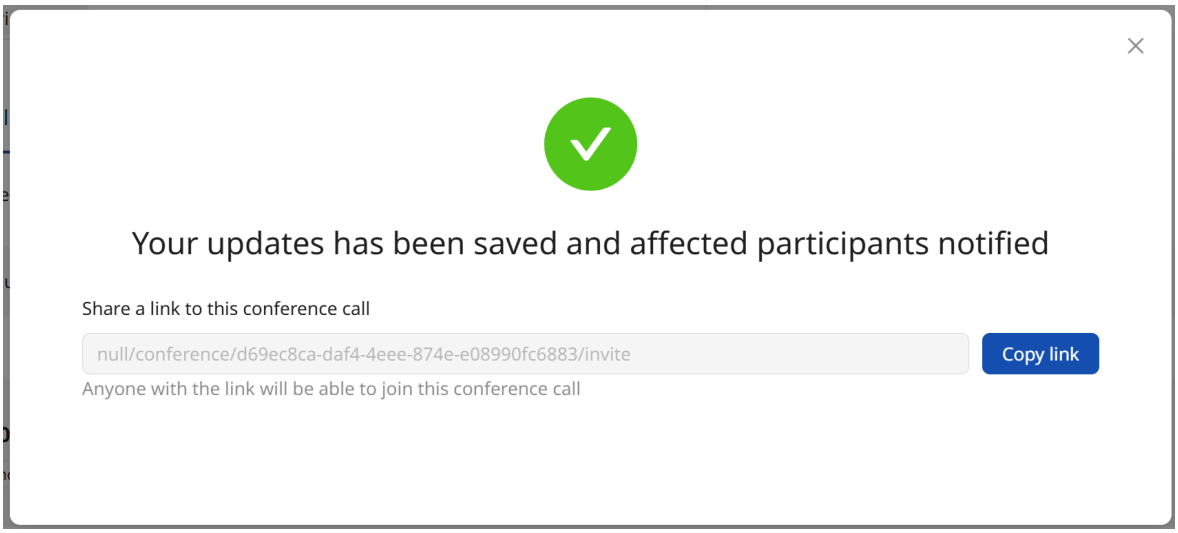
6. When all edits are made, click **Next**.



7. Confirm that that the summary of the edits is correct. If yes, click the **Edit** button to confirm.

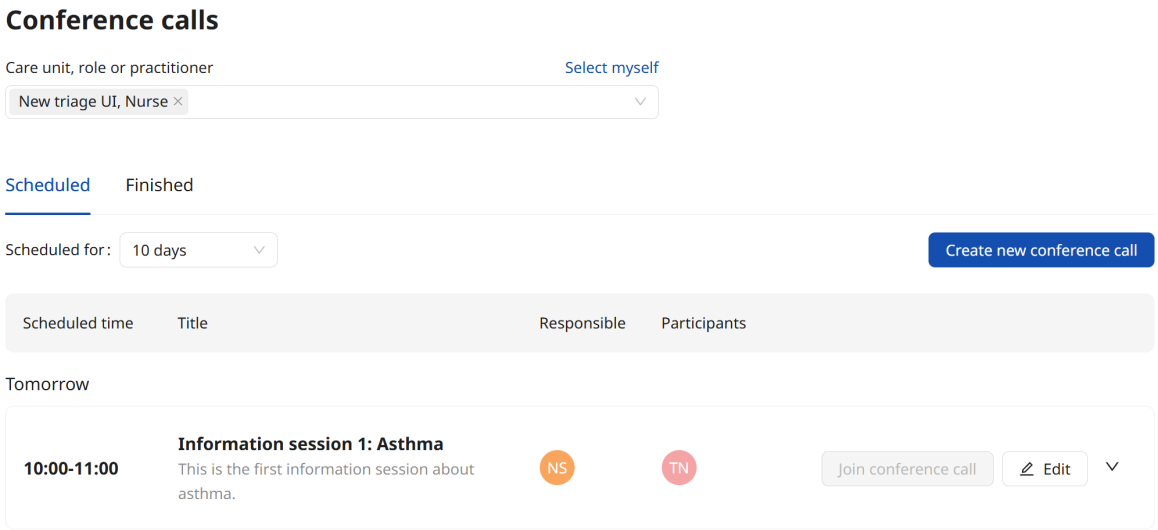
The added participants will be notified in the same way as described in Schedule a new conference call [63] and receive their own unique meeting link. Removed participants will be notified via SMS or email.

8. After clicking the **Edit** button, a confirmation dialog will appear with a general link to the conference call. Anyone who receives this general link can use it to register themselves as an external guest for the conference call.

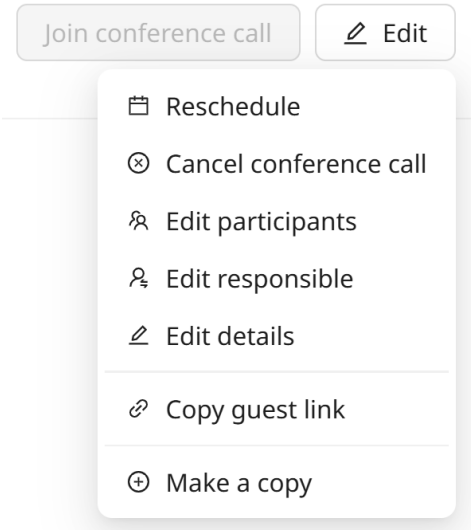


10.9.5. Cancel a conference call

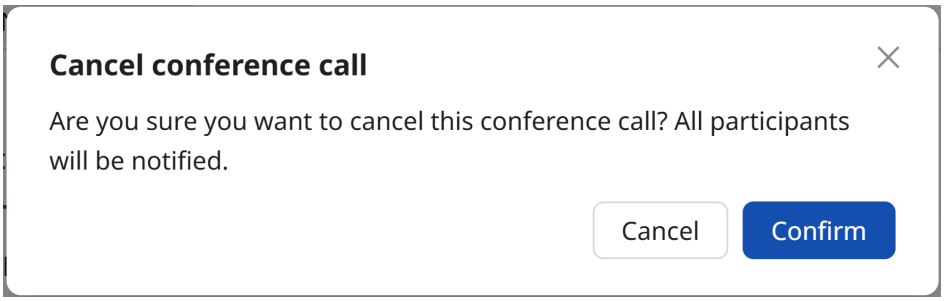
1. If desired, make a selection of a care unit, role, practitioner or yourself in the global resource filter (Global resource filter [20])
2. In the **Scheduled** tab, find the conference call you want to cancel from the list. You can select a time span to further filter the list.



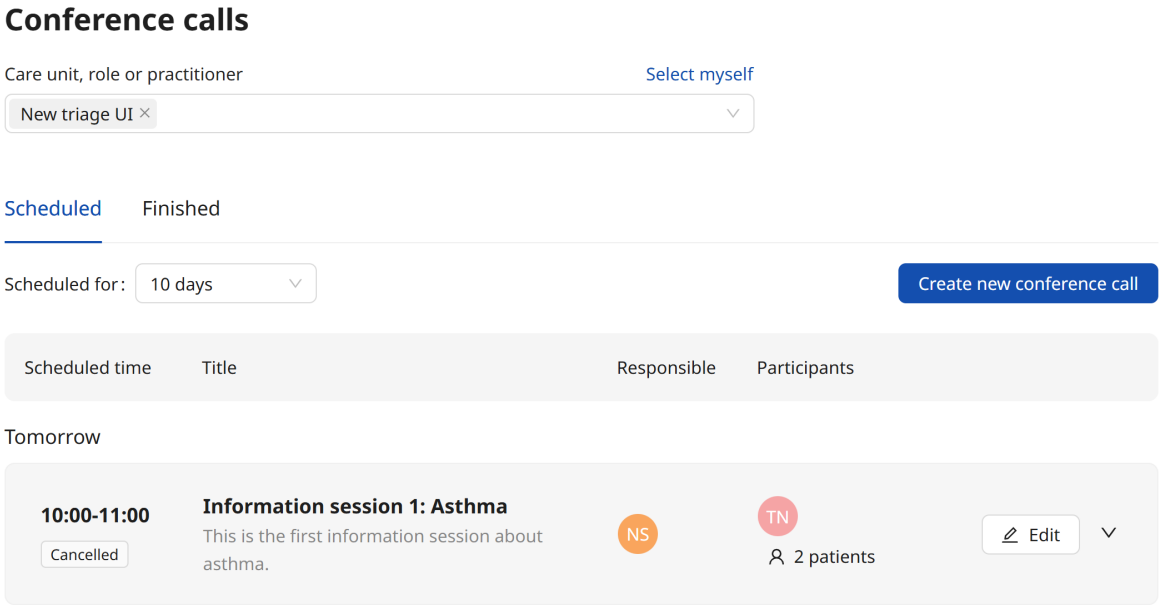
3. Click the **Edit** button at the end of the conference call row and select **Cancel conference call**.



4. Confirm the cancellation by clicking **Confirm**. All participants will then be notified about the cancellation via SMS or email.



The conference call is now marked as "Cancelled" in the **Conference calls** view.



10.10. Attestations

Attestations are tasks created either automatically by the system or manually by practitioners. Which ones are created automatically (if any) are set by your organization, for example when

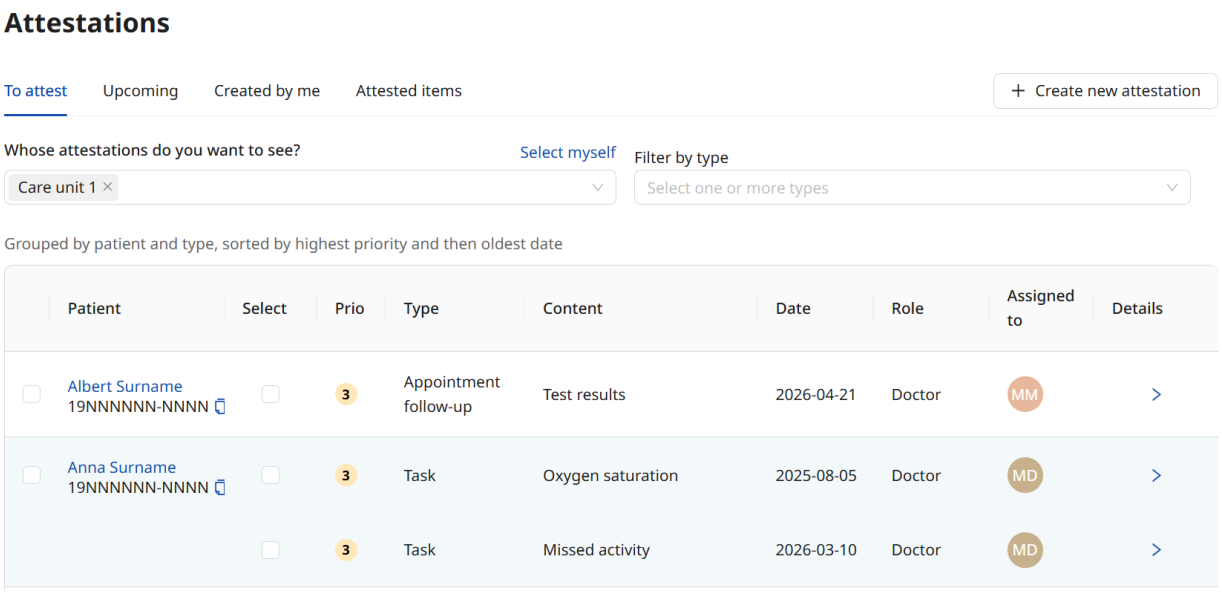
patients have answered interview questions that are not linked to appointments, or if patients do not use their booking tickets.

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

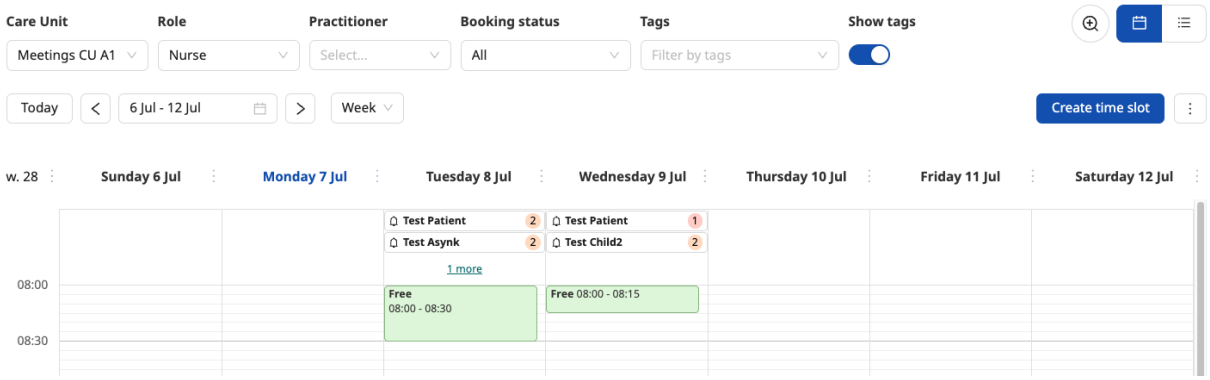
The **Attestations** view displays all attestation entries grouped by patient. For each patient, entries are further grouped by attestation type, such as *Questionnaire completed* or *Missed activity*.

The priority (**Prio**) of the attestation is displayed on a scale, where priority 1 is the most urgent. The attestations are sorted based on the priority of unprocessed entries. This sorting applies both to the order of patients in the list and to the order of entries within each attestation type for a patient.

Patients with the most urgent unprocessed attestation appear first. If multiple patients have unprocessed attestations with the same priority, the patient with the oldest entry is displayed first.



It is possible to schedule attestations to be shown in the inbox for the future. For example, an attestation can be set on Wednesday next week to call a patient about the test results. Scheduled attestations are also visible in the **Calendar** workspace and are shown per day in the calendar (at the top of each day) based on the filters.



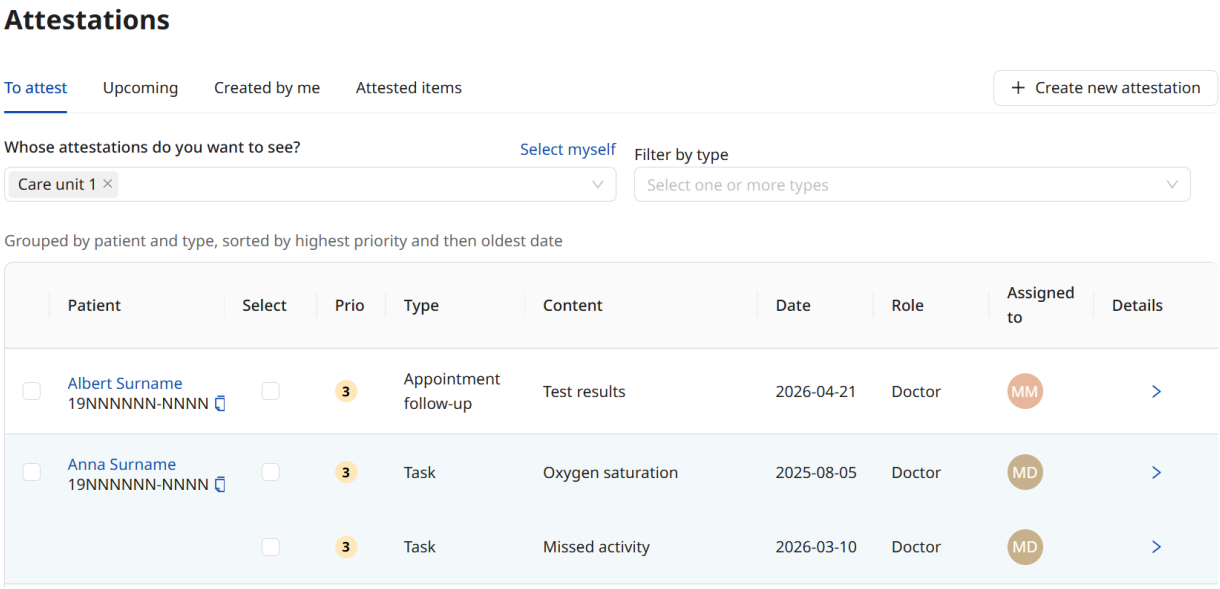
You can also view all attestations for a patient in the **Patient activity** tab (see Patient activity [136]).

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

10.10.1. Incoming attestations

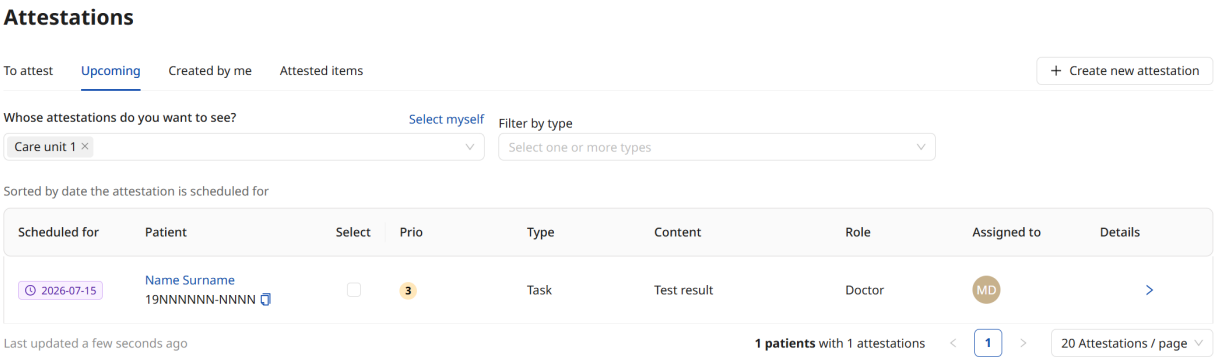
All incoming attestations are listed in the **To attest** tab in the **Attestations** view. The attestations are grouped per patient and sorted by priority.

The attestations in the **To attest** 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.



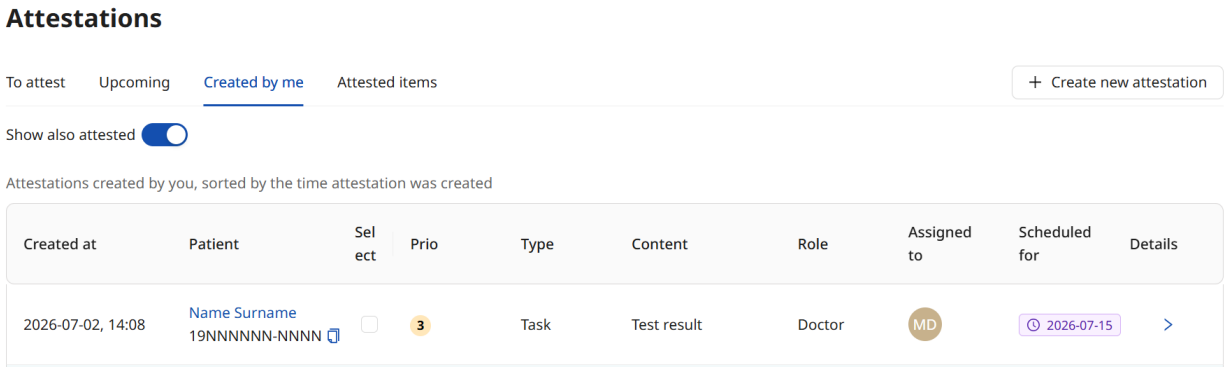
10.10.2. Upcoming attestations

The **Upcoming** tab in the **Attestations** view lists the upcoming scheduled attestations.



10.10.3. Attestations created by me

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



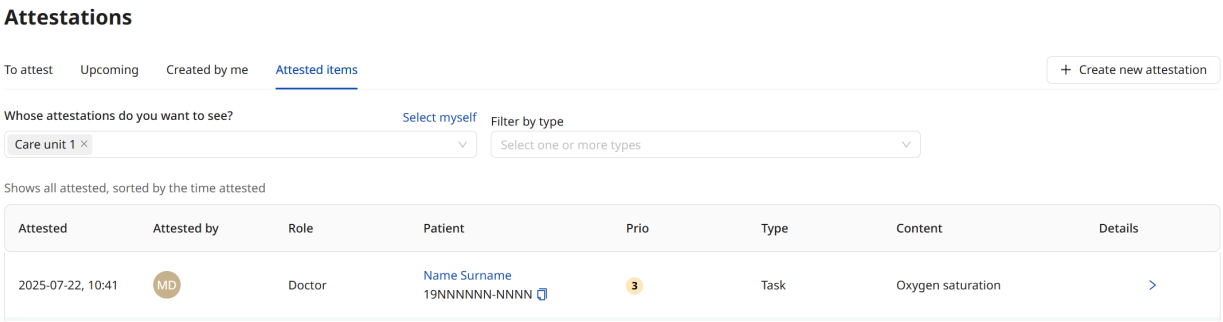
Use the **Show also attested** slider to also show the already attested attestations.



10.10.4. Attested items

The **Attested items** tab in the **Attestations** view, lists all attestations that have been attested.

The attestations in the **Attested items** 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.



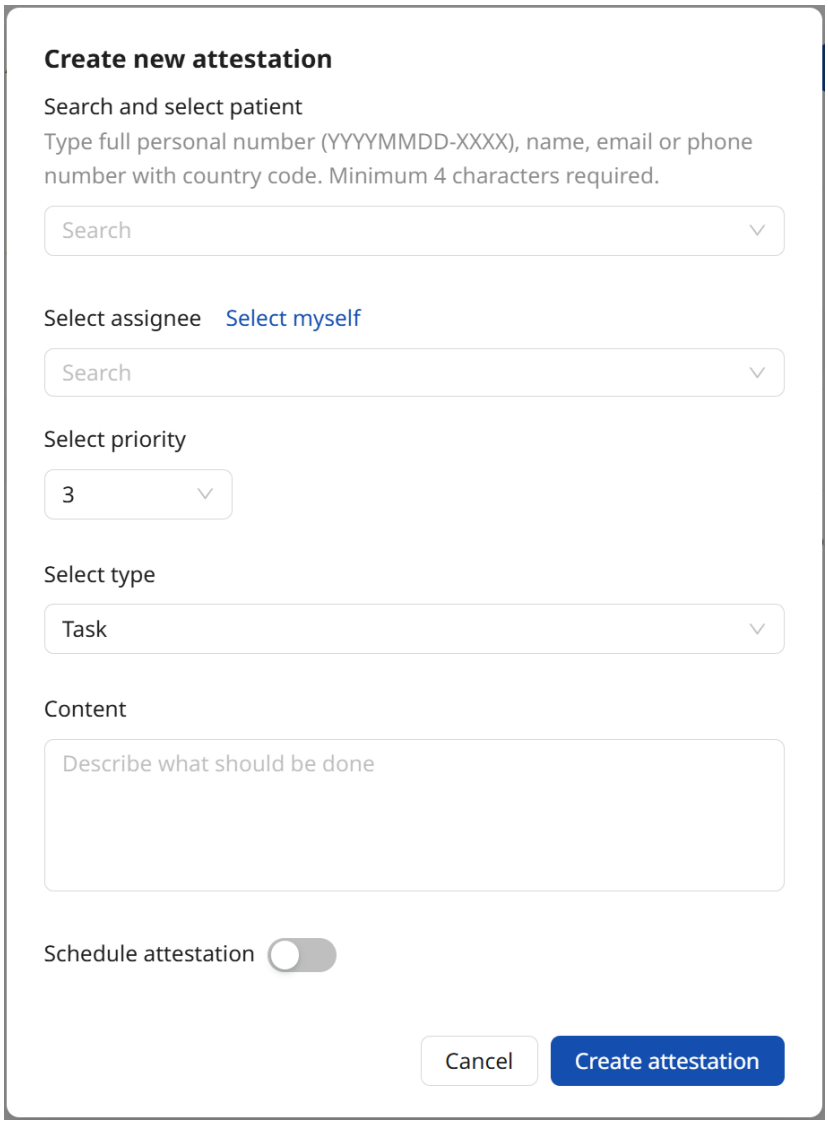
10.10.5. Create a new attestation

To create a new attestation outside of a patient visit:

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



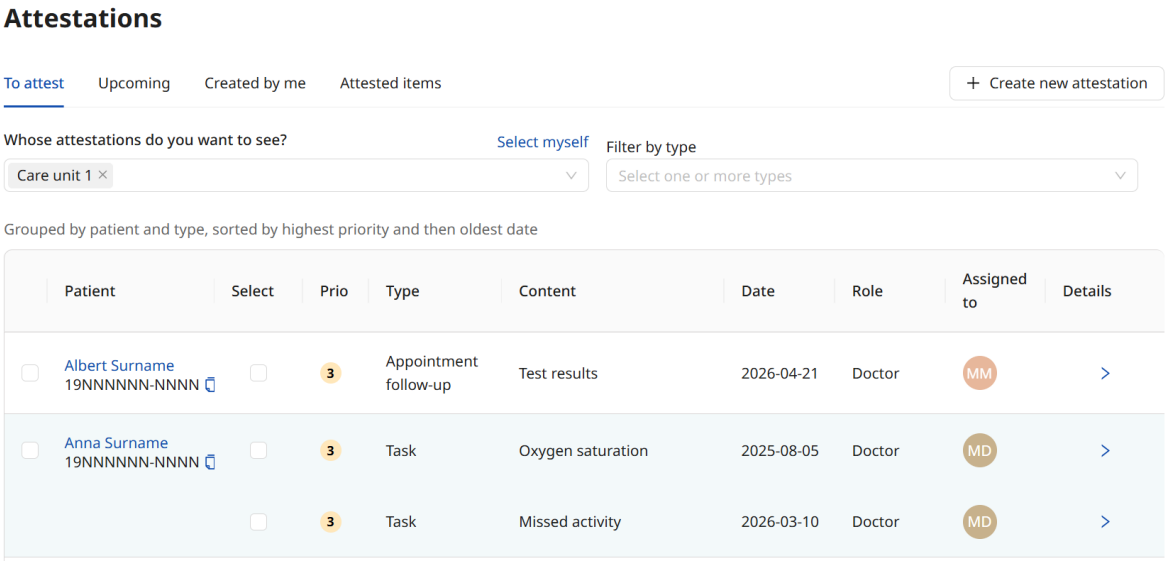
This opens the **Create new attestation** dialog.



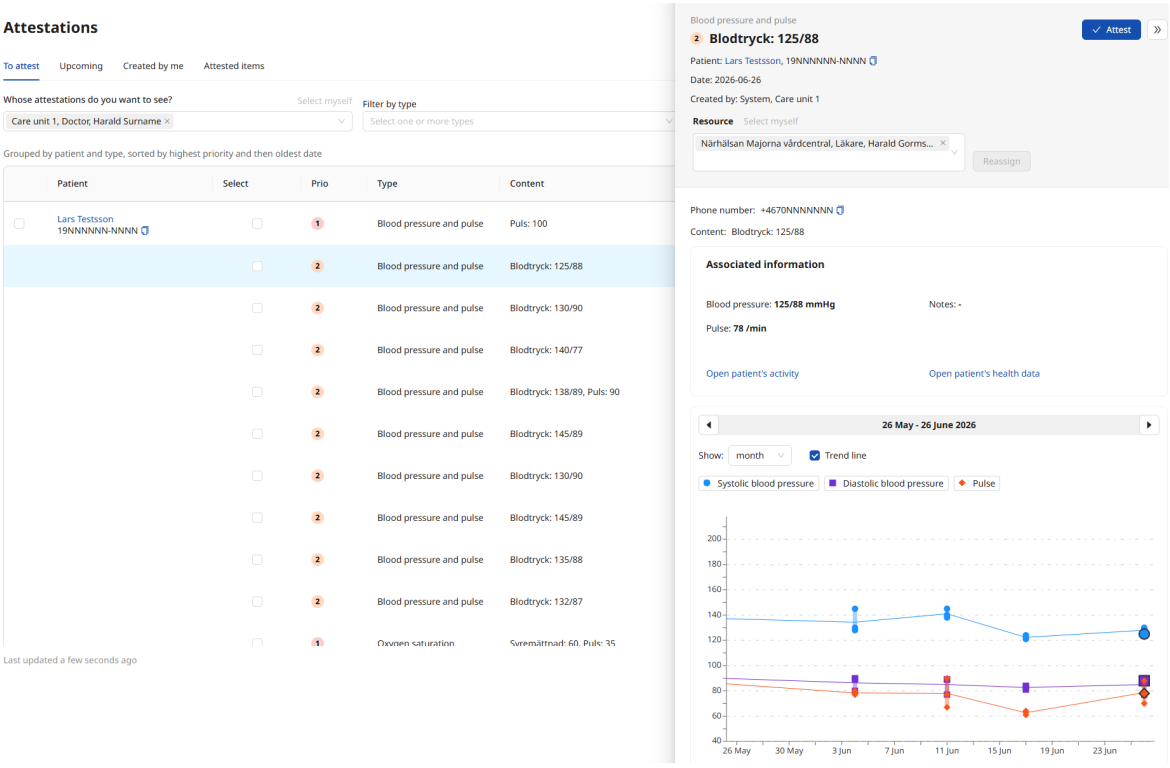
2. Add the patient that the attestation should be connected to in the **Search and select patient** field. It is possible to search and add the patient via name or unique personal identifier.
3. Expand the tree structure in the **Select assignee** field to select the desired role or practitioner.
4. Set **Select priority**. This sets the attestation priority on a scale of 1 to 5, where 1 is most urgent.
5. An attestation created by a practitioner will automatically be set as a *Task*. This is possible to change if your organization has another type for attestations.
6. Add a description of the task in the **Content** field according to the procedure at your clinic.
7. Click **Create attestation**.

10.10.6. Attest an attestation

1. Click **Attestations** in the main menu to open the **To attest** tab in the **Attestations** view.

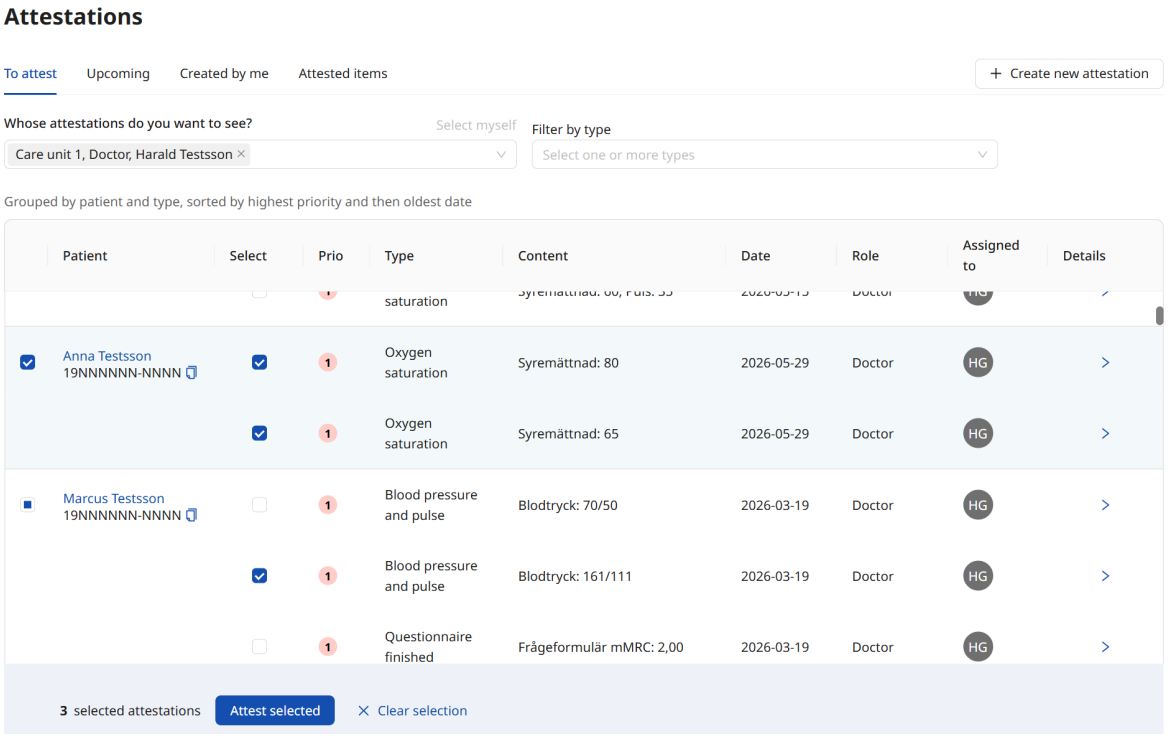


2. If desired, click on an attestation to show more details about the attestation. If applicable, the detailed view also contains links to the patient activity and to the **Health data** tab.



3. Select one or more attestations in the attestations list.
4. Click the **Attest** button, either in the detailed view or in the attestations list.

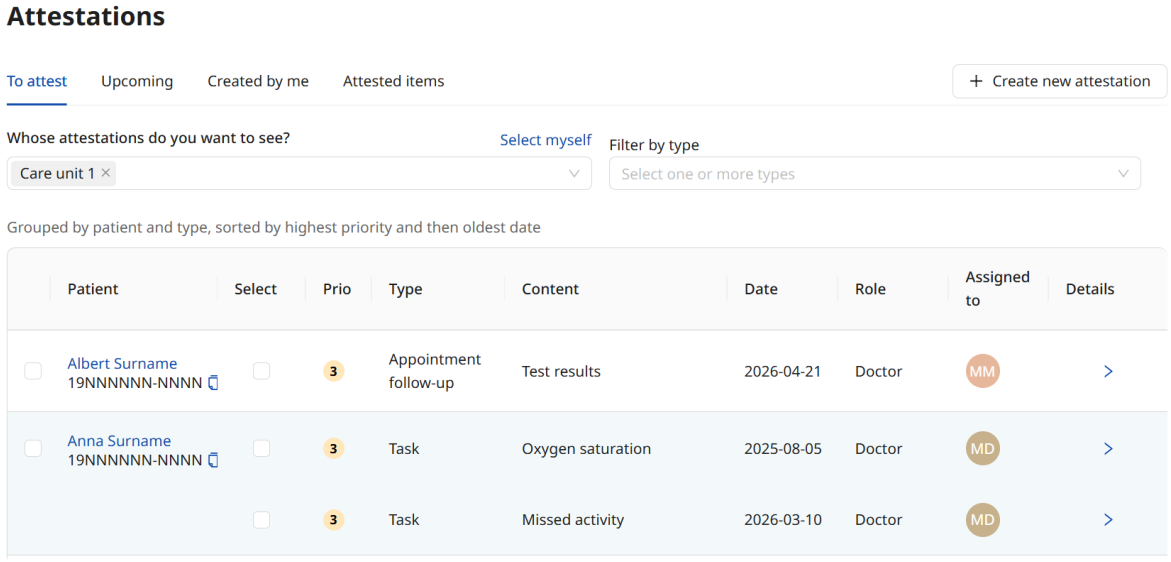
The **Attest** button is always visible in the detailed view, but in the attestations list it will appear at the bottom of the list when one or more attestations are selected (the button will then be called **Attest selected**).



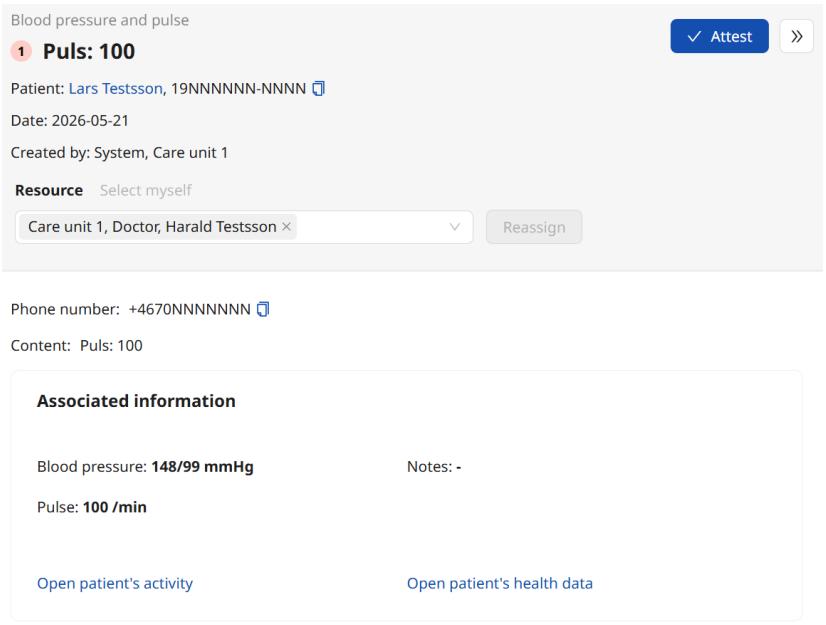
10.10.7. Reassign an attestation to a colleague or role

To reassign an attestation to another colleague or role:

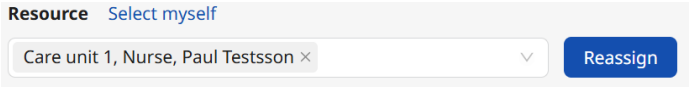
1. Click on the attestation entry in the **Attestations** list.



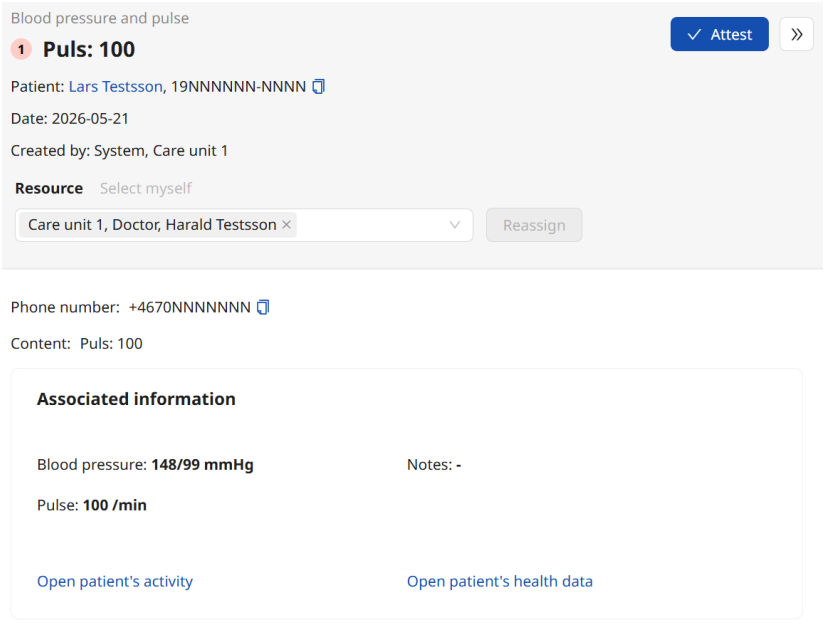
This opens the attestation view with details about the patient and why the attestation was created. Scroll down for more information, such as for example a graph if the attestation relates to remote monitoring.



2. Reassign the attestation in one of the following ways:
   - Select a resource from the **Resource** list and click **Reassign**.



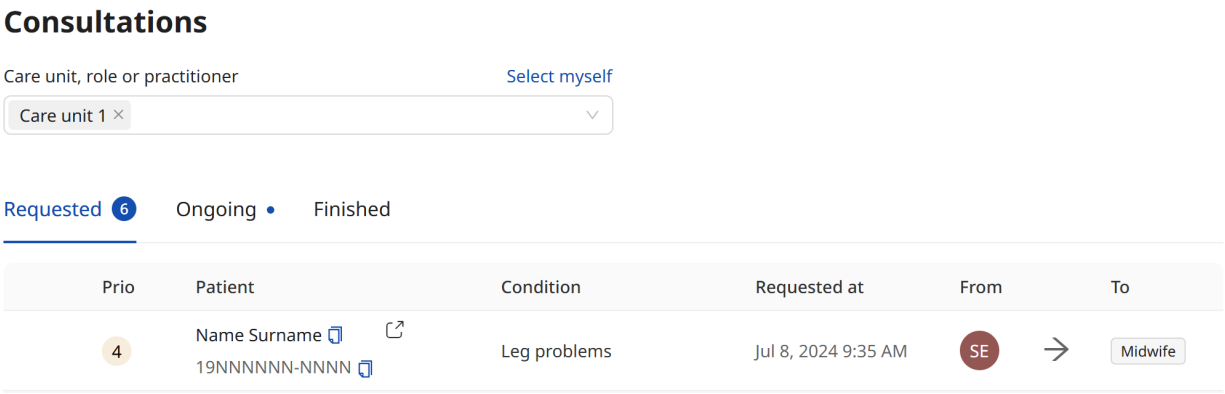
   - Reassign the attestation to yourself by selecting **Select myself** and clicking **Reassign**.
3. If you reassigned the attestation to yourself, you can click on **Attest** when you have assessed and handled the content in the attestation view.



10.11. Consultations

In this view, consultations where you consult a colleague are managed. A consultation in Clinic is a digital dialogue between practitioners with the purpose of obtaining advice, an assessment, or a second opinion regarding a patient or a specific patient case. Consultations in Clinic enable clear and documented communication in the patient case, reducing the risk of misunderstandings and loss of information.

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



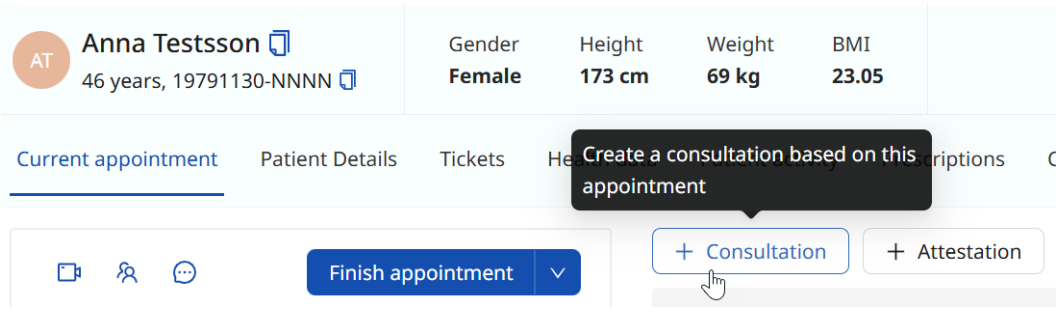
The **Consultations** view contains three tabs:

- **Requested**: Here you can see requested consultations that have not yet been received by practitioners. The consultations are sorted by priority (if applicable) and by the time the consultation request was sent.
- **Ongoing**: Here you can see consultations that are currently in progress, that is, those that have been received by practitioners. The consultations are sorted by when the last message was sent. The consultation with the most recent message is shown at the top.
- **Finished**: Here you can see consultations that have been completed in the last 30 days. After 30 days, the consultations disappear from this tab, but you can find them by going to the patient's profile. The consultations are sorted by when they were finished (or when they were canceled). The most recently completed consultation is shown at the top.

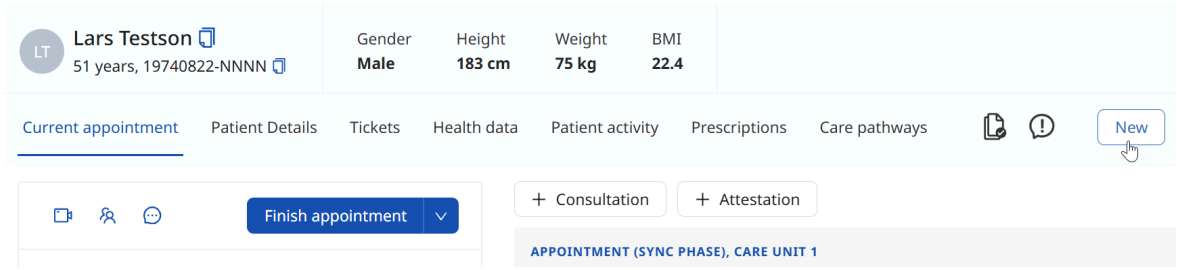
The tab order correlates to a left-to-right workflow that is used in this view. Click on a row in the list to open the visits page.

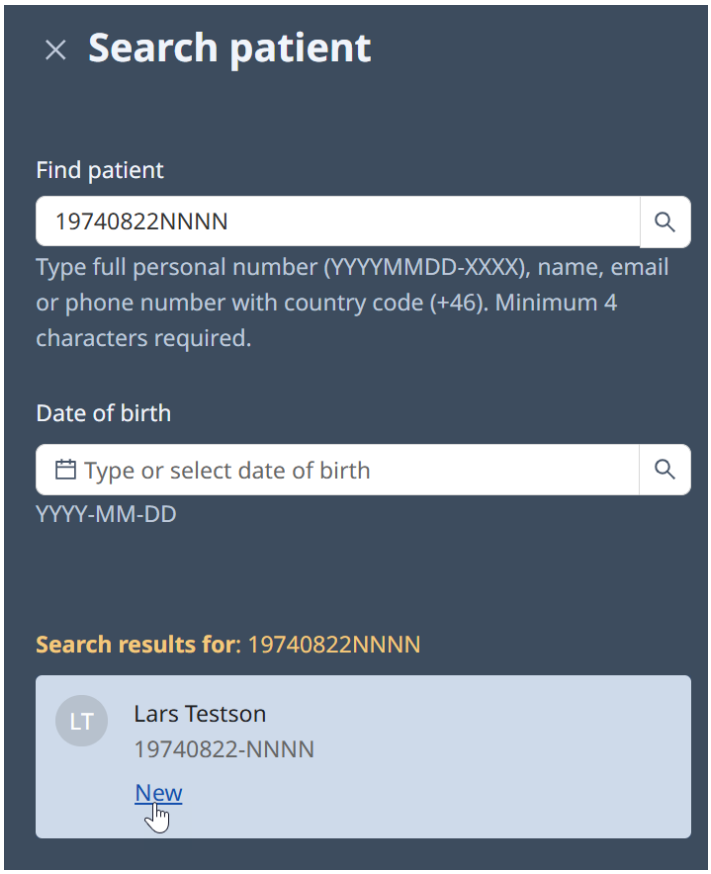
10.11.1. Request a consultation

1. To initiate a consultation request, click the **+ Consultation** button. This opens the **Create new consultation** dialog (see step 2).

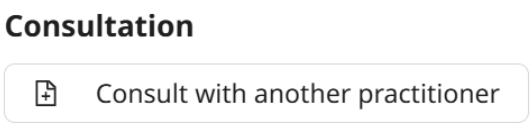


You can also initiate a consultation request by clicking **New** in the current patient visit/case or when searching for a patient.

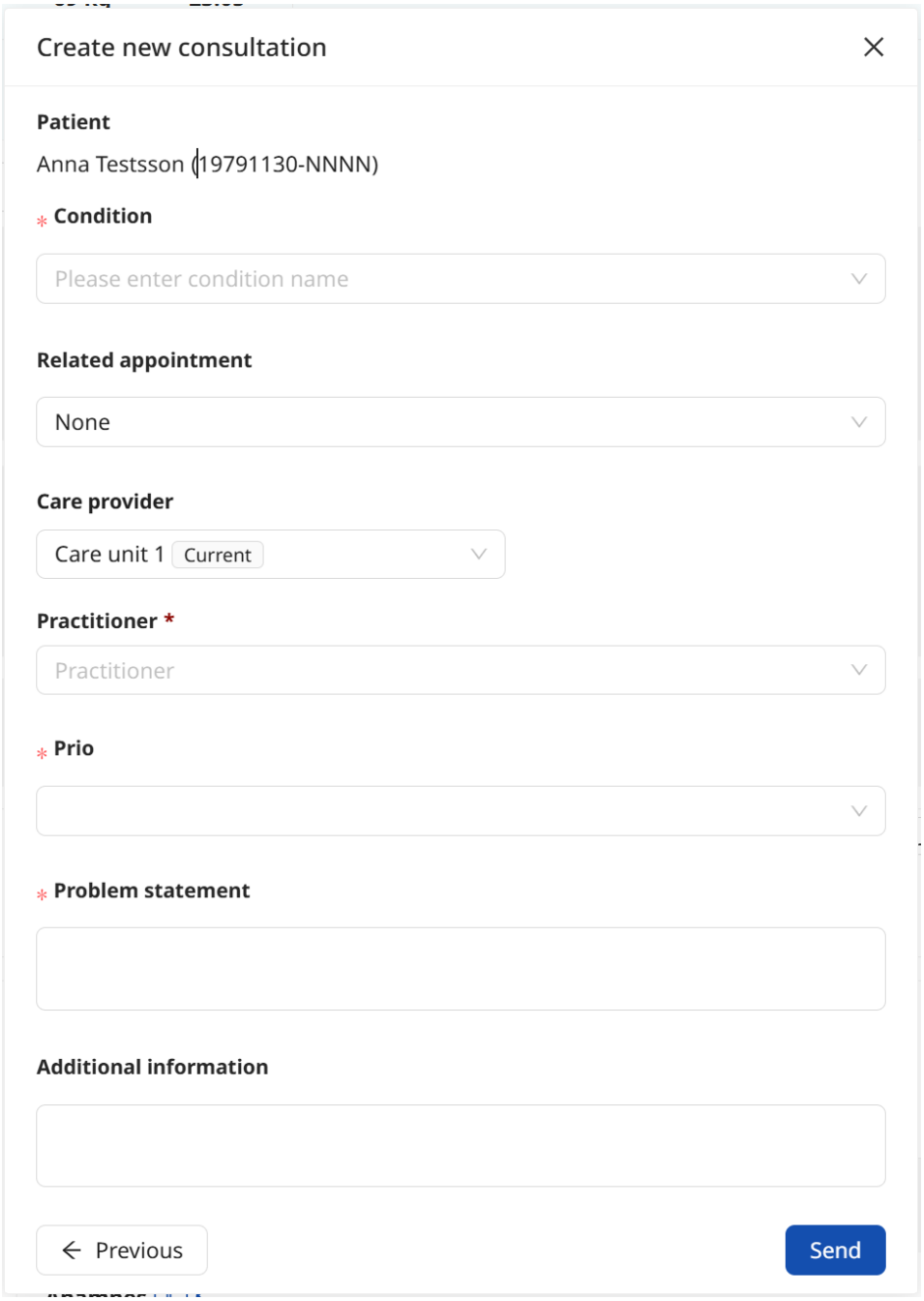




You then also need to select the visit type **Consult with another practitioner** to open the **Create new consultation** dialog.

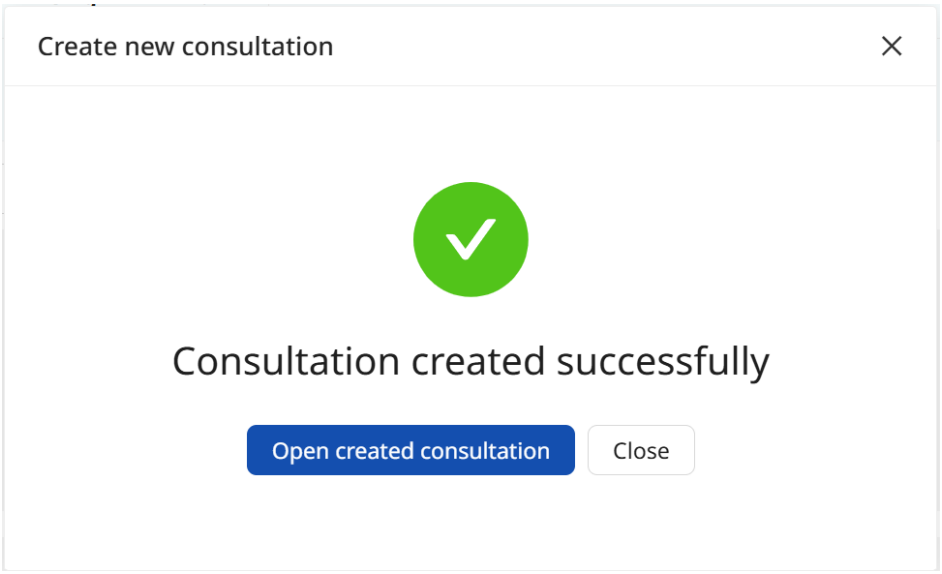


2. In the **Create new consultation** dialog, select one of the predefined options in the **Condition** field.



3. If desired, add a related appointment.
4. Your care provider is preselected, but you can change it in the **Care provider** field if the consultation should be sent to another care provider.
5. Select **Practitioner** (role or a specific person at the desired care unit) that should receive the consultation.
6. Add the priority of the consultation in the **Prio** field where 1 is most urgent.
7. Write the consultation's problem description in the **Problem statement** field (max 1000 characters).
8. If needed, add any additional information to the practitioner receiving the consultation in the **Additional information** field (max 1000 characters).
9. Click **Send**.

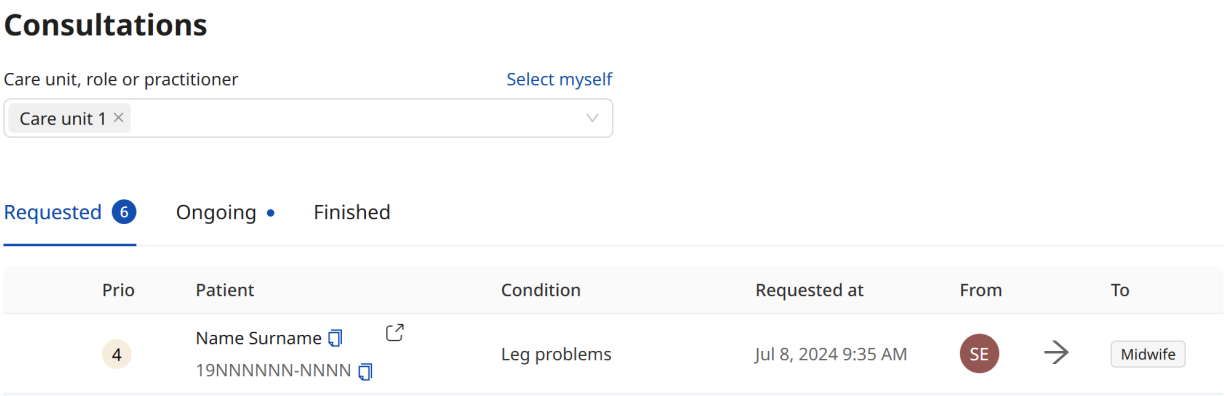
A confirmation dialog appears where you can select to go directly to the created consultation (**Open created consultation**) or to close the dialog.



10.11.2. Requested

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

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

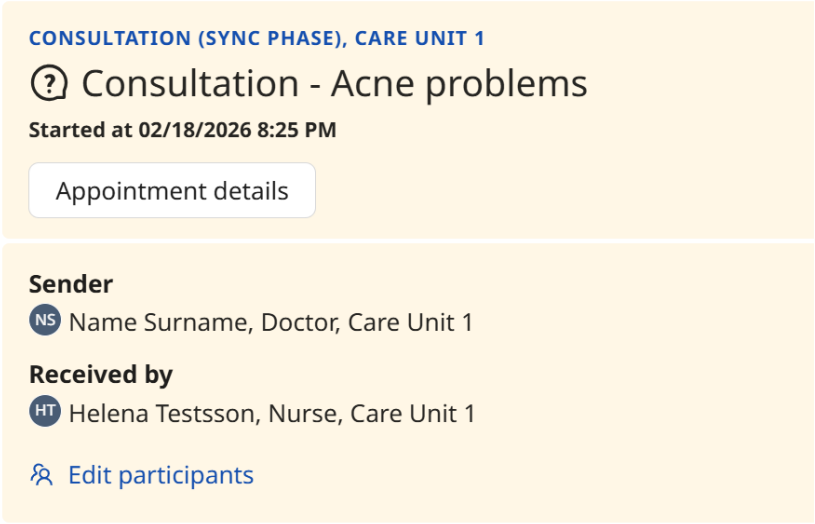


10.11.3. Add and remove additional participants in a consultation

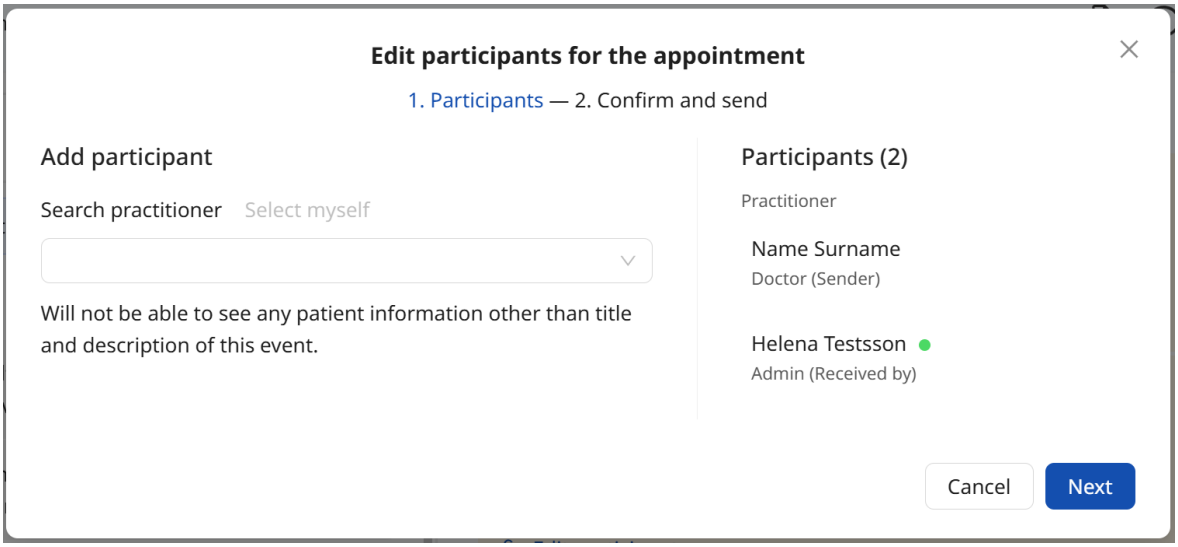
NOTE
Only additional practitioners can be added to and removed from an existing consultation. The sender and receiver of a consultation cannot be changed.

Add participants

1. Click the **Edit participants** button in the ongoing consultation.

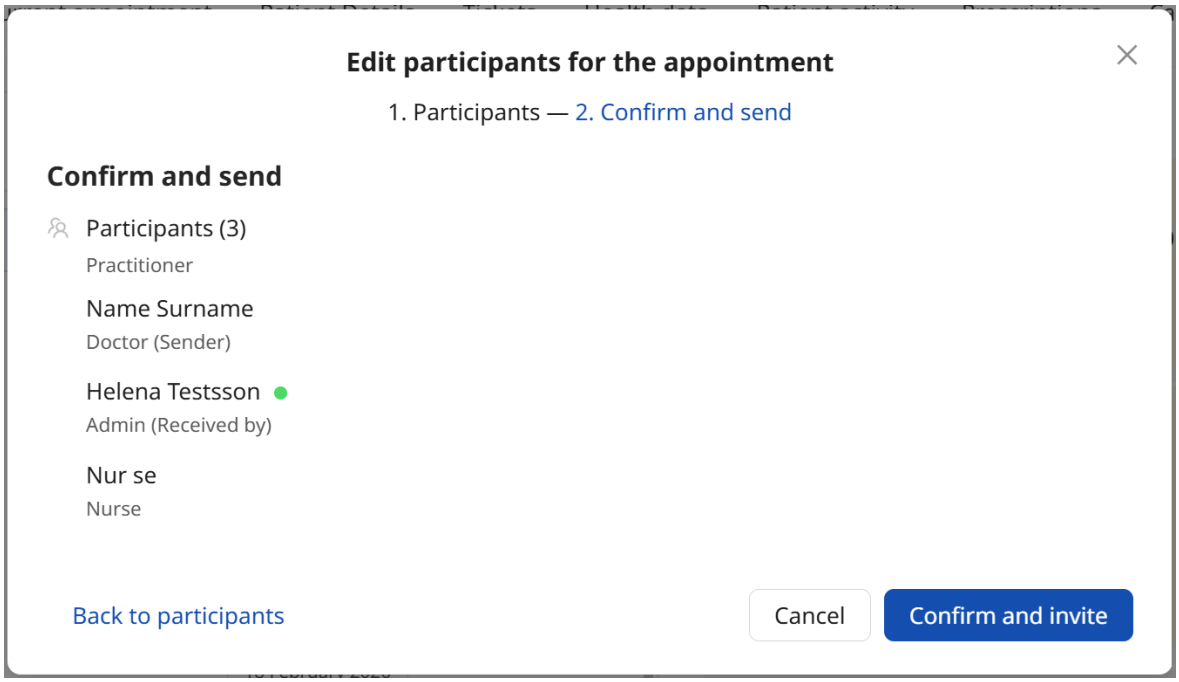


2. Add the desired practitioners from the **Search practitioner** field. Click **Select myself** to add yourself to the consultation.

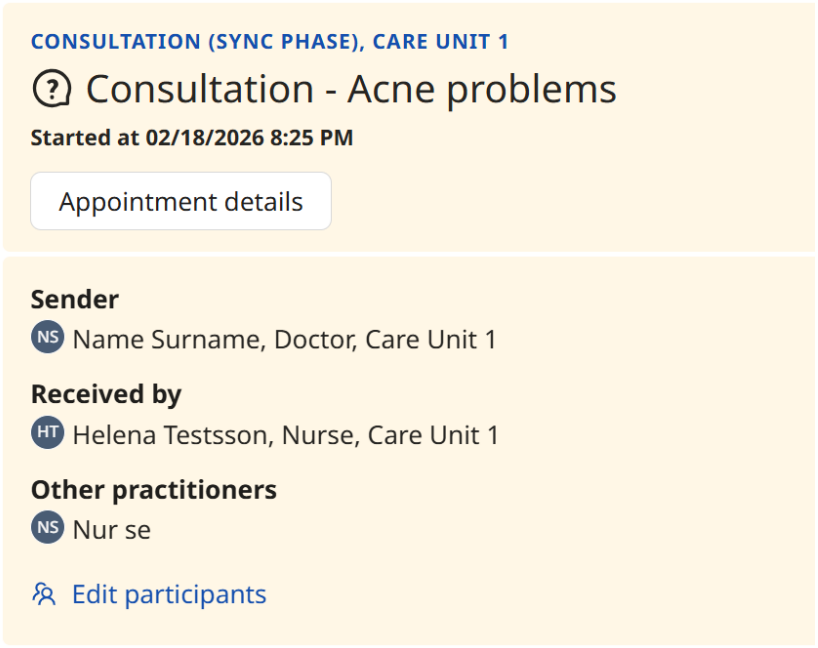


3. Click **Next**.

4. Confirm that the participants list is correct and click **Confirm and invite**.

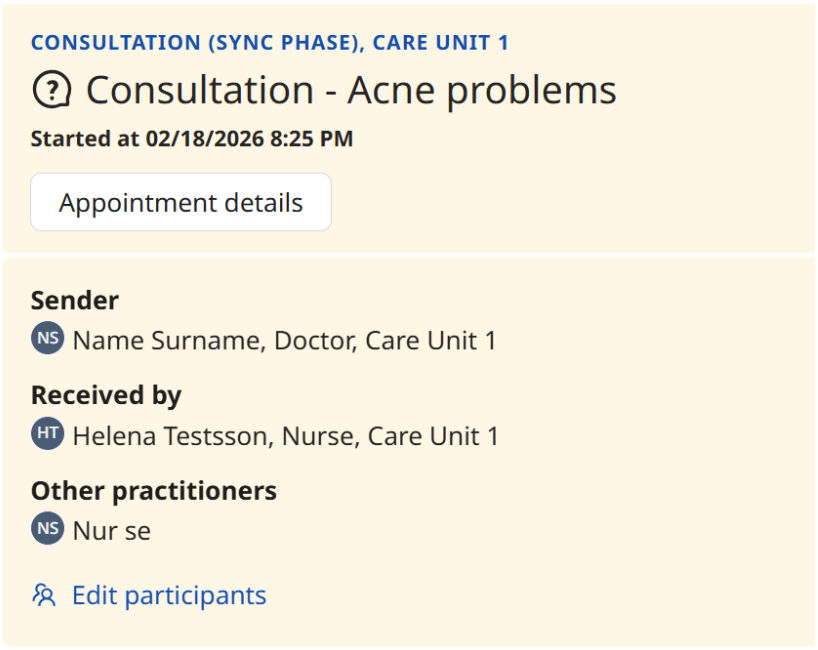


The added participants will now be visible in the **Other practitioners** field in the consultation view.

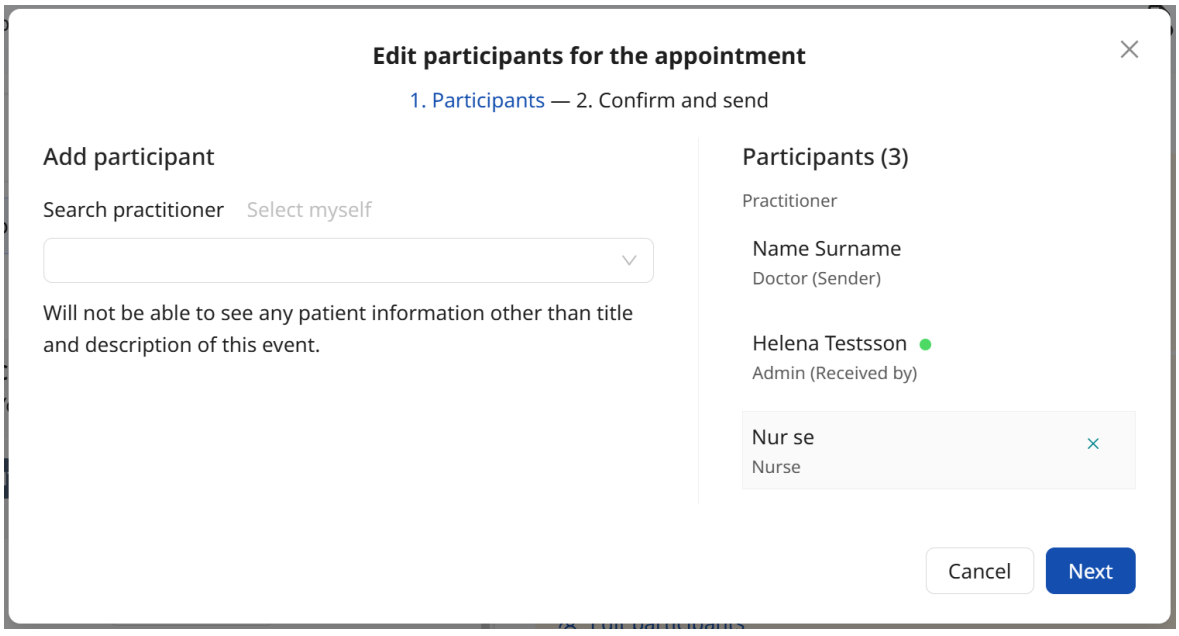


Remove participants

1. Click the **Edit participants** button in the ongoing consultation.

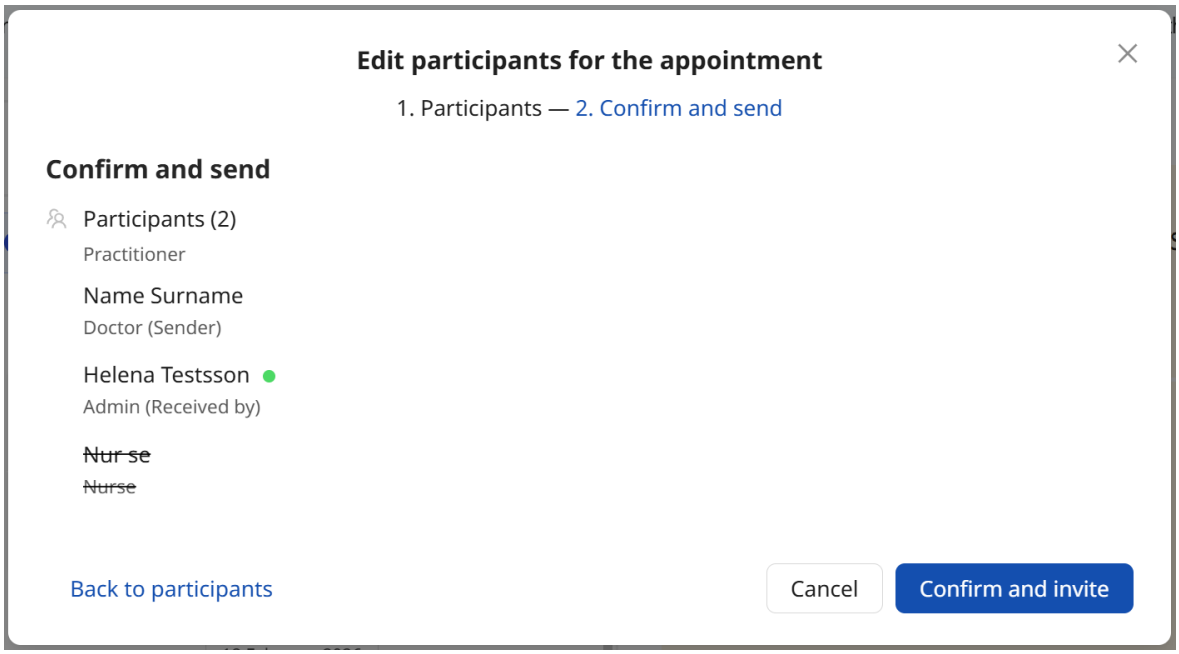


2. In the **Participants** list to the right, click 'x' next to the name of the participant you want to remove from the consultation.

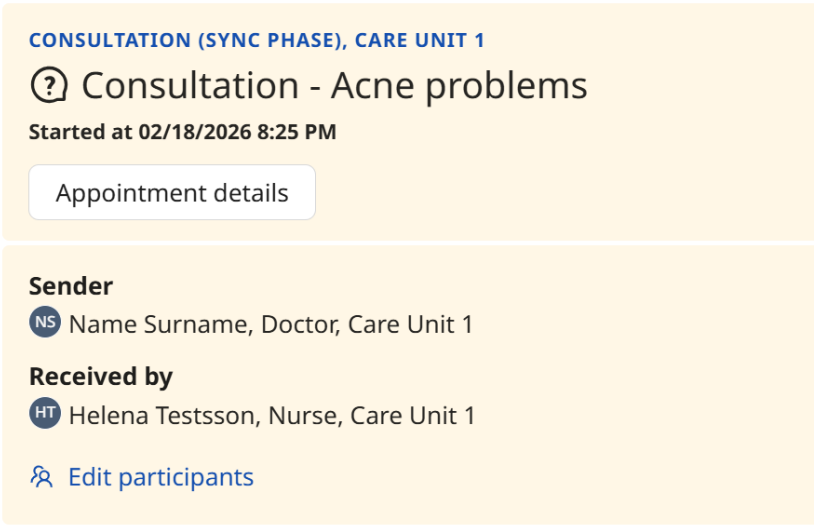


3. Click **Next**.

4. In the overview, the removed participant is shown as crossed out. Click **Confirm and invite** to confirm the update.



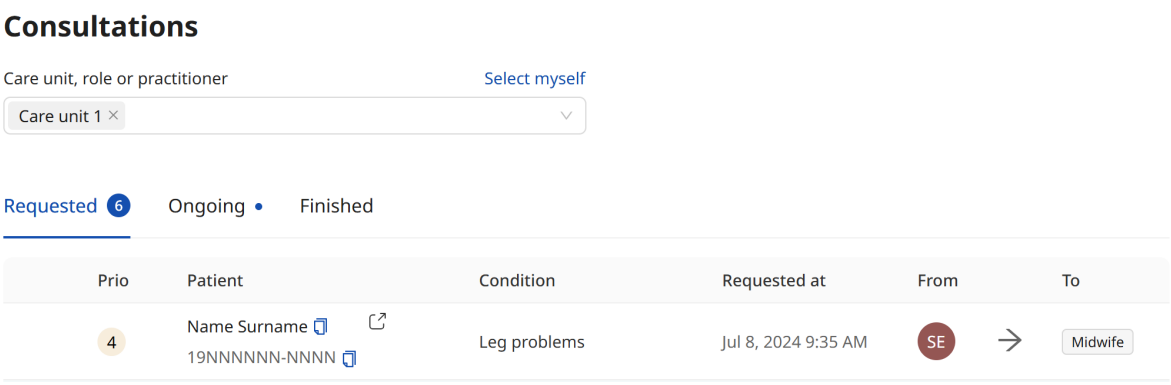
The removed participants will no longer be visible in the consultation view.



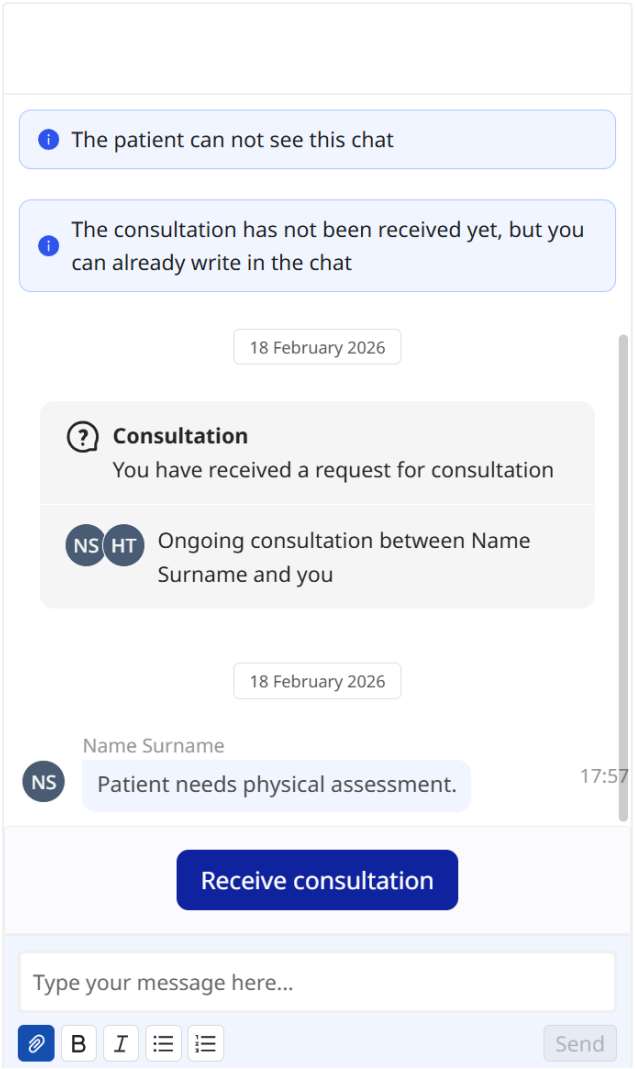
10.11.4. Receive and start a consultation

1. If desired, make a selection of a care unit, role, practitioner or yourself in the global resource filter (Global resource filter [20])

2. Go to the **Requested** tab and click on the consultation you want to start.



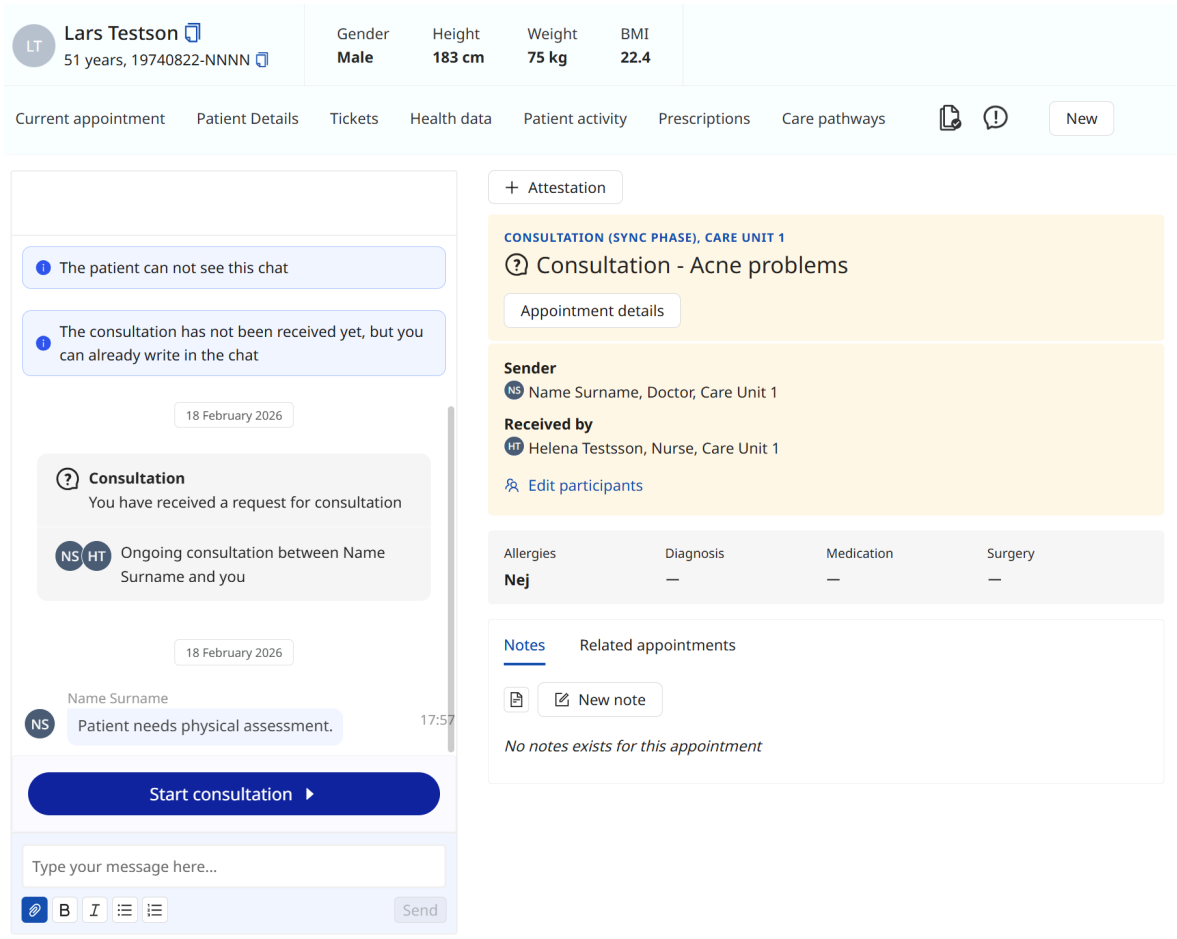
3. Click the **Receive consultation** button in the in the chat.



4. Confirm by clicking **Receive**.



5. Prepare for the digital consultation. For example with reading up on the information sent in the chat by the practitioner that requested the consultation. You can also check if there are any related appointments (in the **Related appointments** tab next to **Notes**).



6. When you are ready to start the consultation, click the **Start consultation** button.

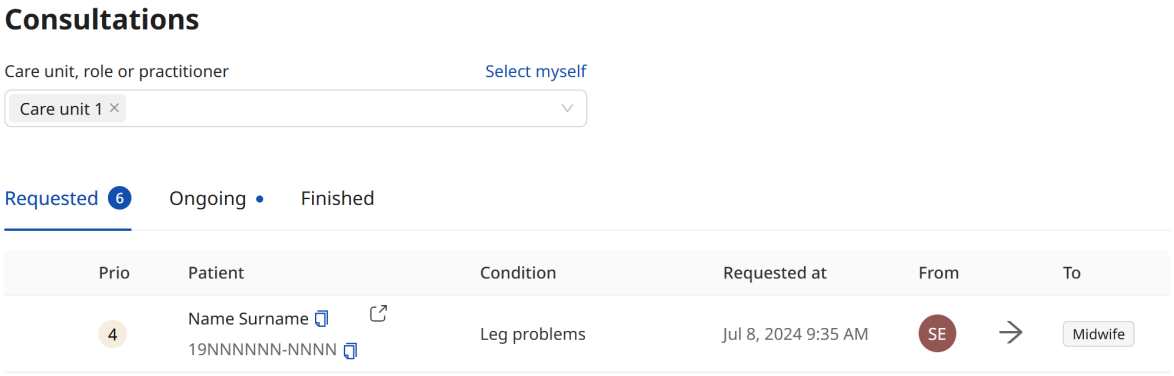


10.11.5. Cancel or finish a consultation

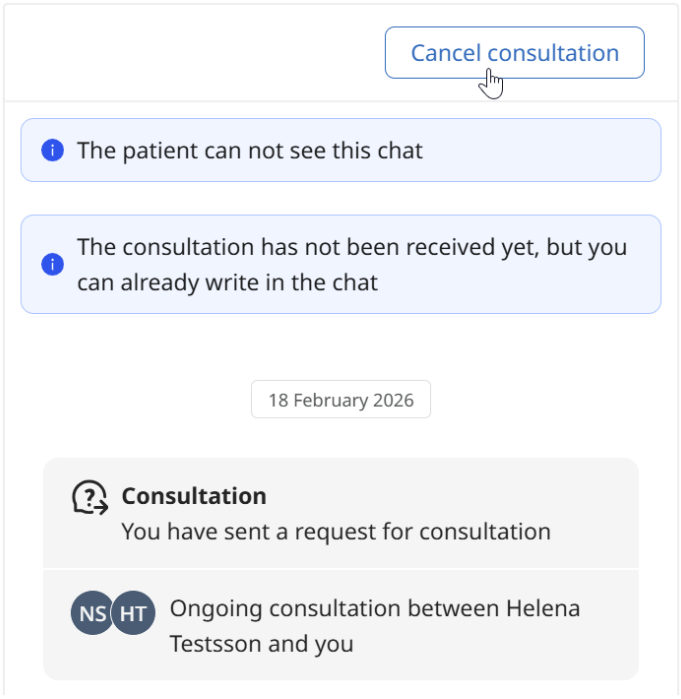
Cancel a consultation before it has started

If needed, you can cancel a consultation before it has been received by a practitioner.

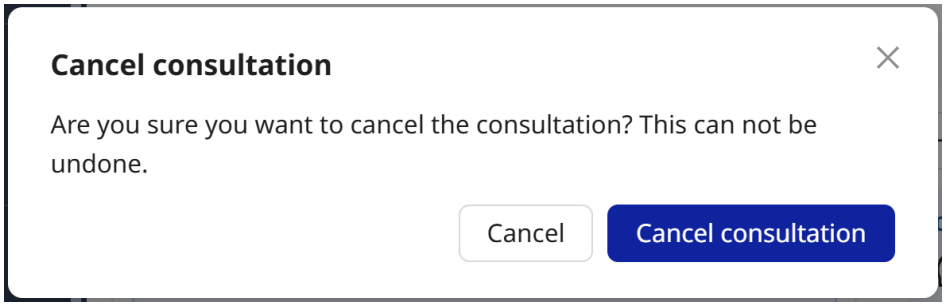
1. Open the consultation (can be found in the **Requested** tab).



2. Click the **Cancel consultation** button above the chat in the consultation view.



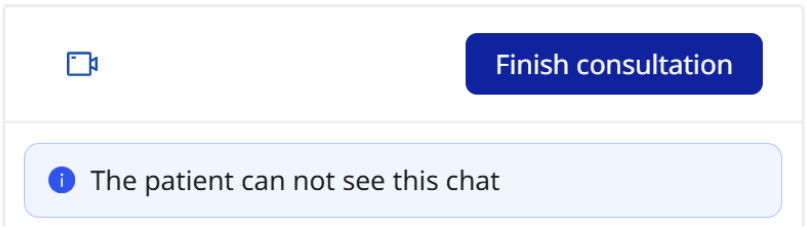
3. Click the **Cancel consultation** button to confirm the cancellation.



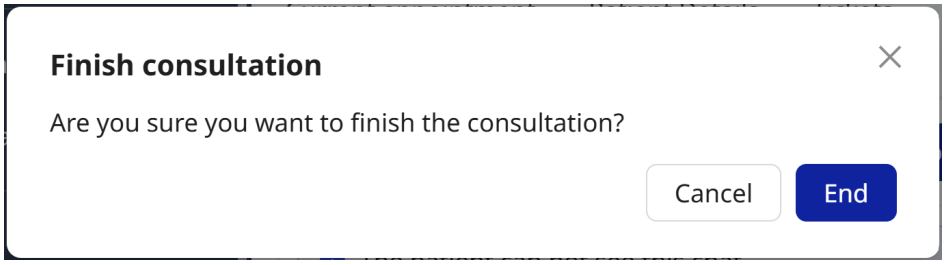
The consultation will now be moved to the **Finished** tab.

Finish a consultation

1. Click the **Finish consultation** button above the chat in the consultation view.



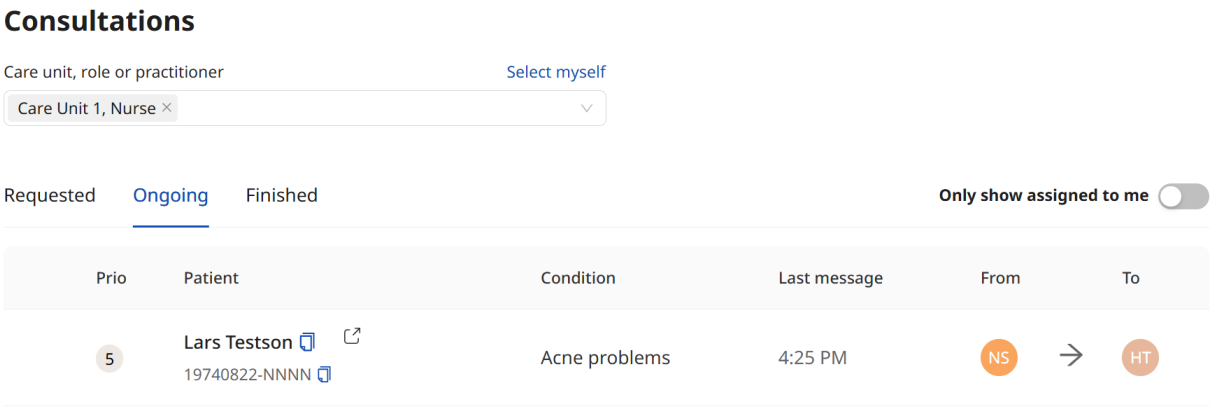
2. Click the **End** button to confirm.



The consultation will now be moved to the **Finished** tab.

10.11.6. Ongoing

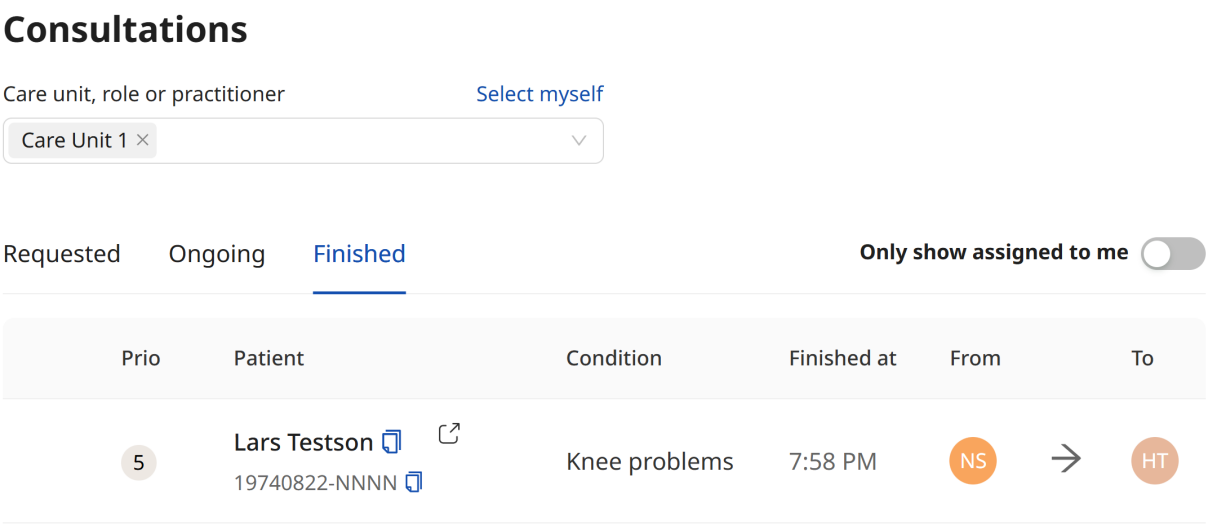
The **Ongoing** tab displays all ongoing consultations and is sorted by when the last message was sent (newest on top).



10.11.7. Finished

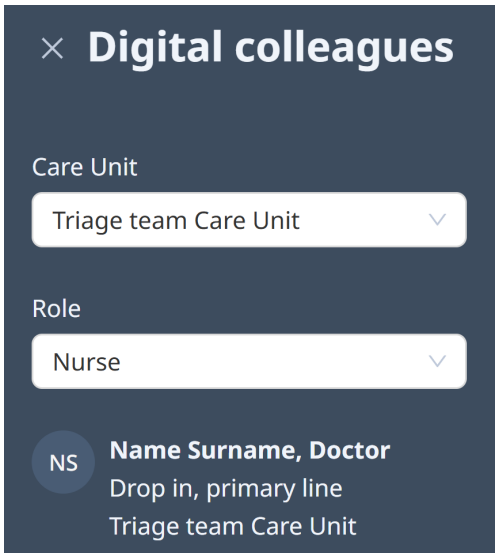
The **Finished** tab displays all finished consultations. These consultations are closed and cannot be used for communication.

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



10.12. Digital colleagues

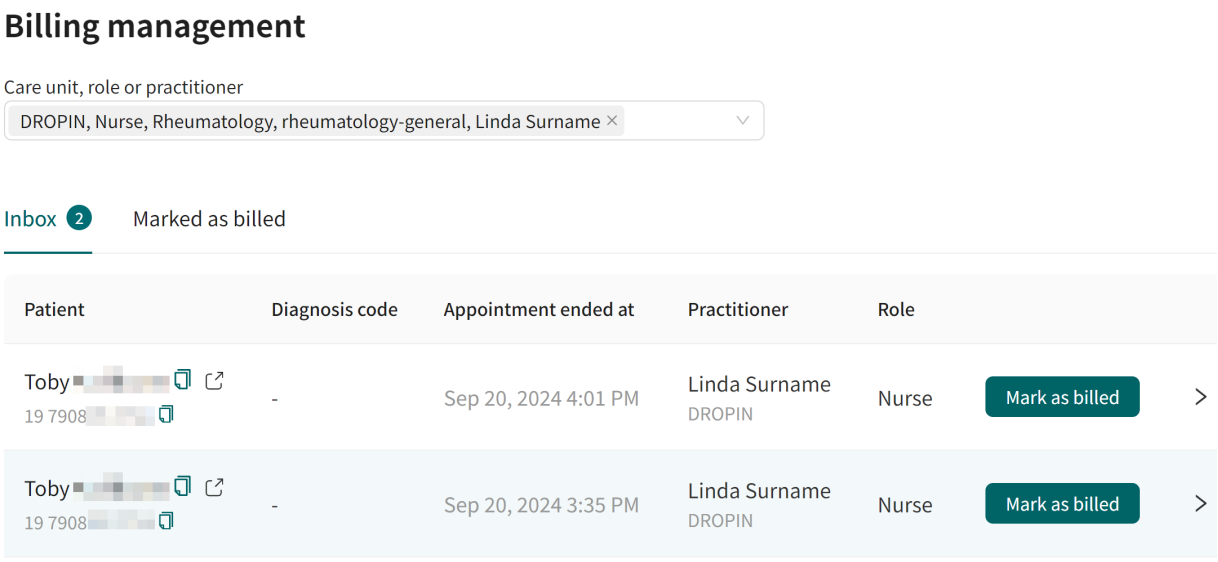
Here you can see which colleagues are logged in to Clinic.



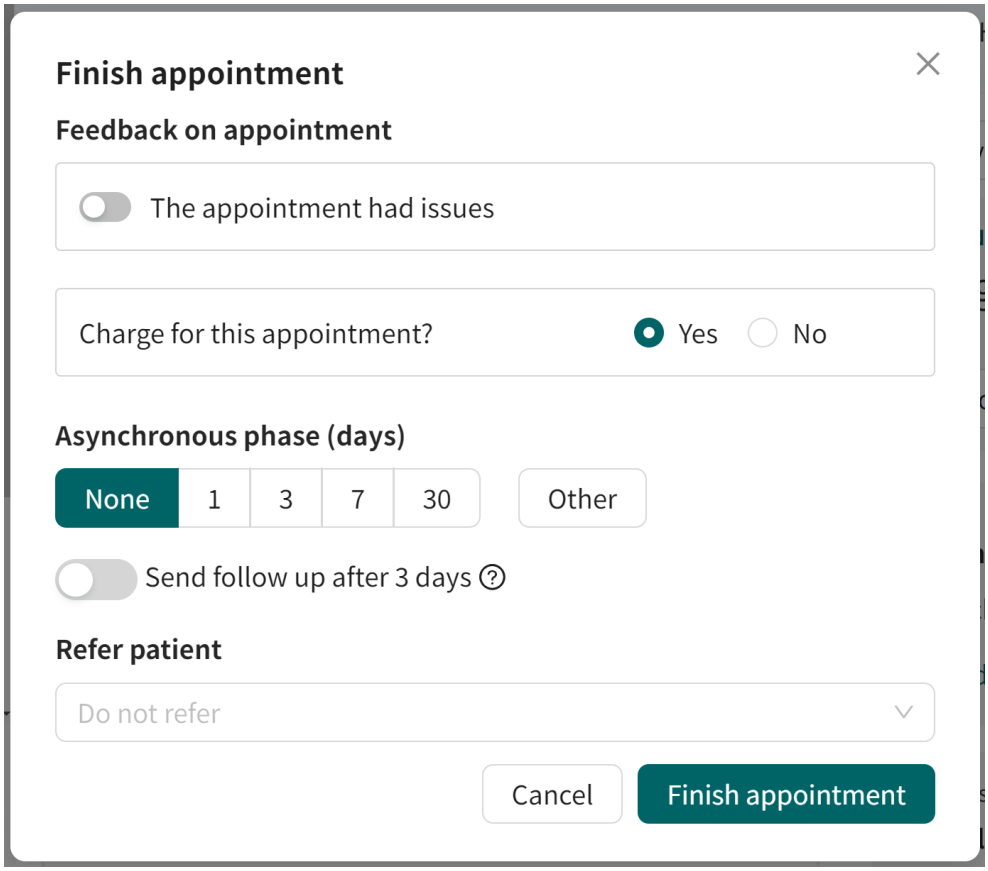
- **Care unit:** You can select which care unit to display if your organization has more than one care unit.
- **Role:** You can choose to see all colleagues or filter on colleagues with a role. The roles may vary from care unit to care unit.

10.13. Billing management

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

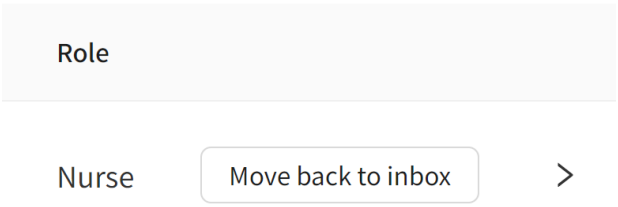


For a visit to appear in the **Billing management** view, this needs to be indicated in the **Finish appointment** dialog (**Charge for this appointment?** = **Yes**) when finishing a visit.



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

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



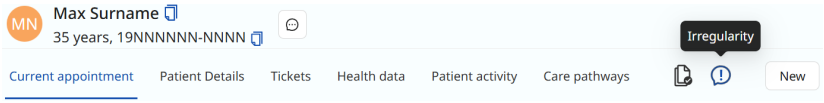
10.14. Irregularities

If your organization has enabled the **Irregularity** function, all users can report internal feedback and findings with the service, including medical irregularities, according to your organization's procedures. Not all users can receive and manage irregularities. This is done by a smaller group with special authority.

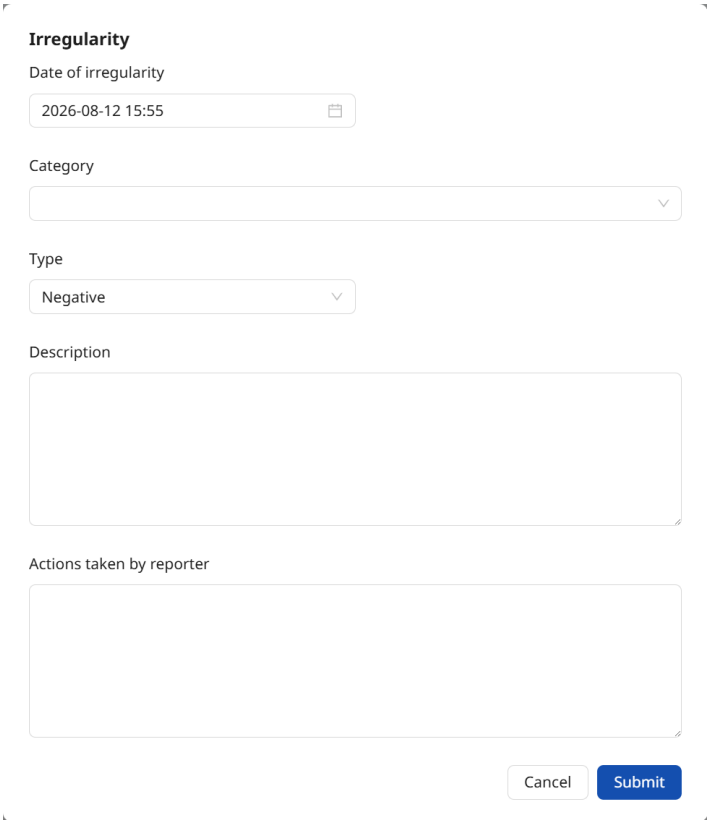
10.14.1. To report irregularities

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

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



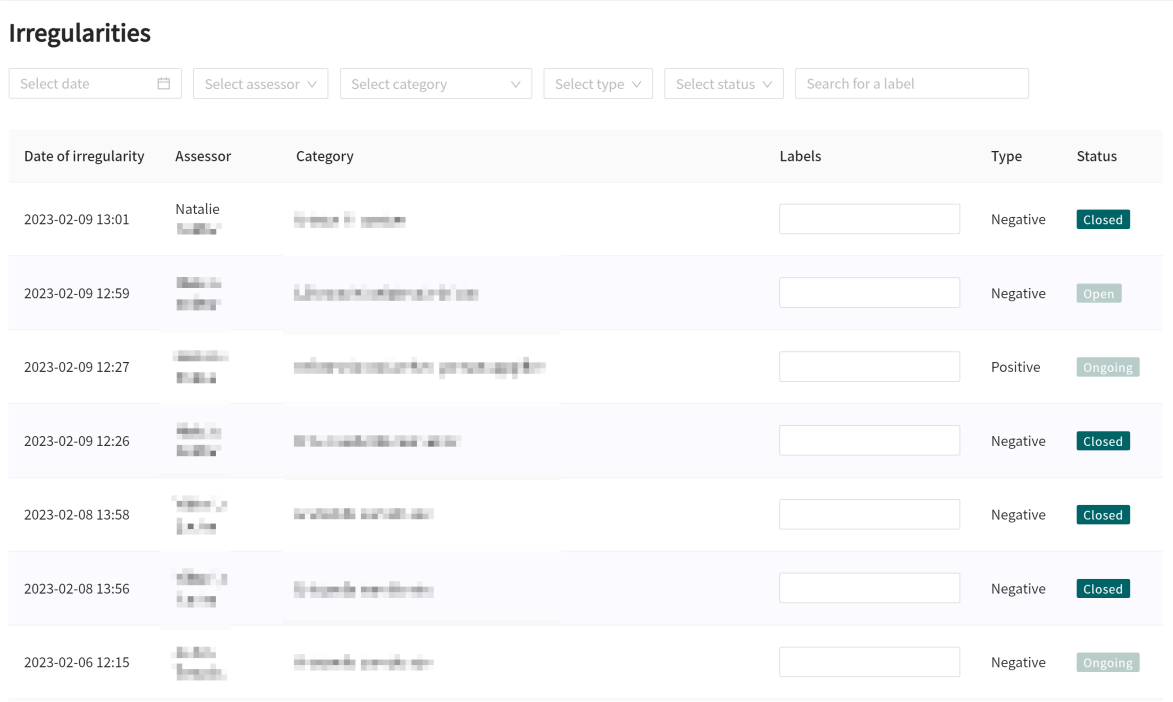
3. Fill in the relevant information.



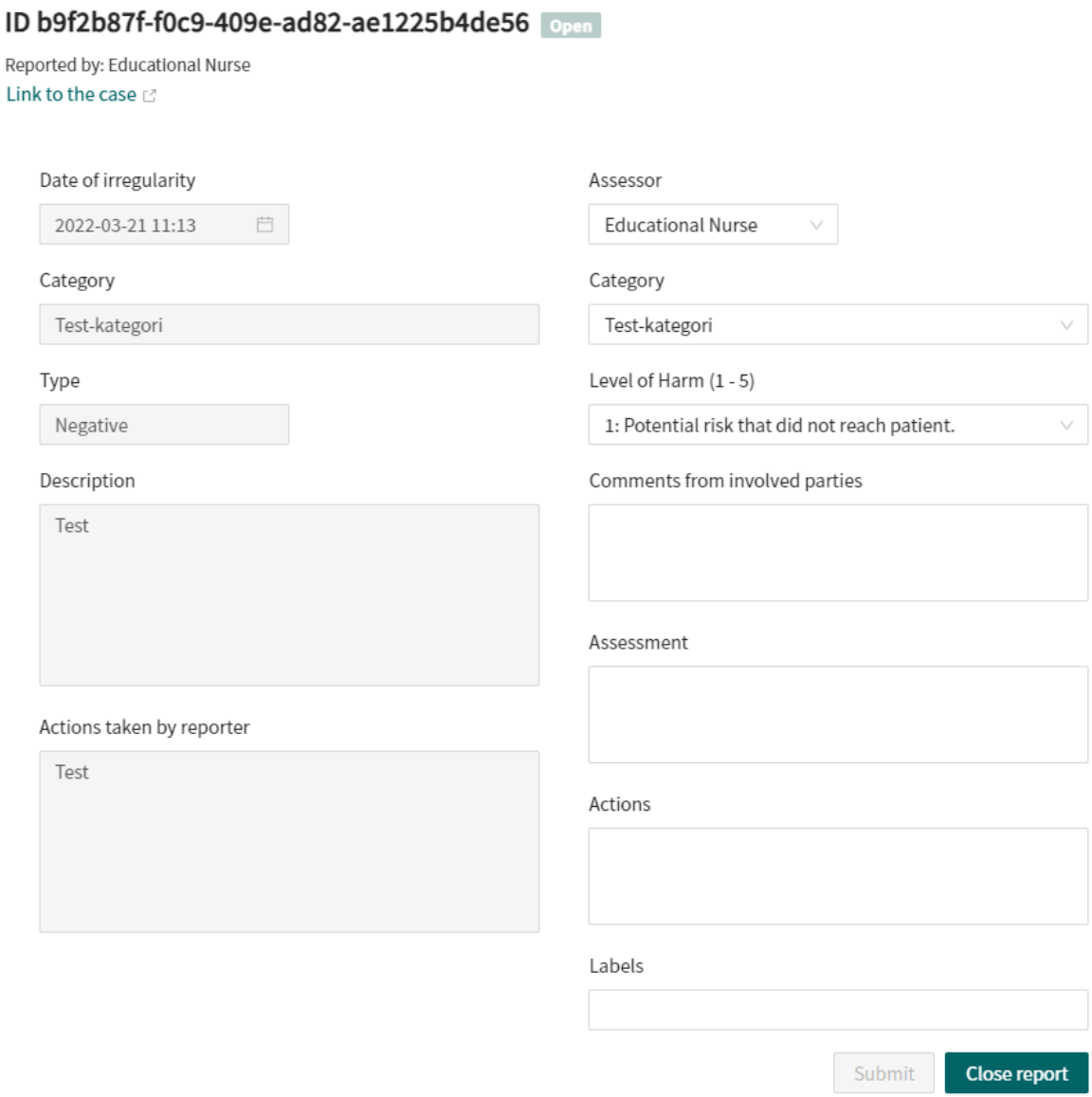
4. Click **Submit**.

10.14.2. To read and manage irregularities

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



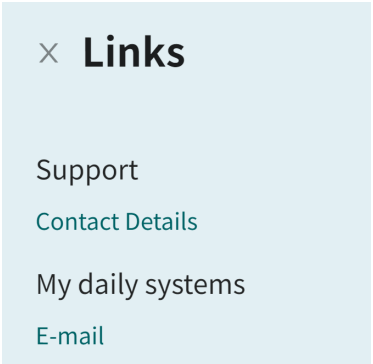
2. To assess an irregularity, click on the irregularity in question.
This opens a detailed view about the irregularity.



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

10.15. Links

Here are links to resources that your care unit has deemed useful to be aware of.



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

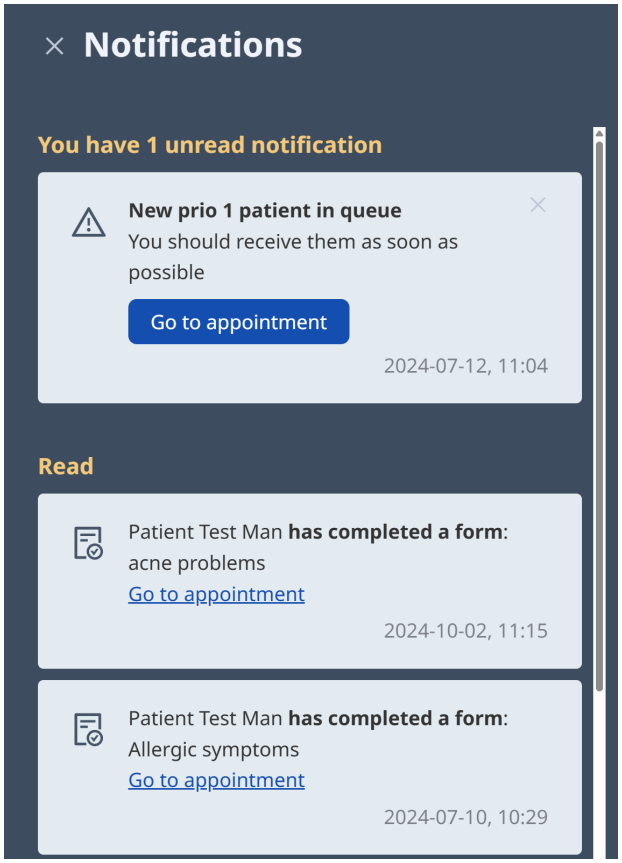
10.16. Notifications

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

Notifications are created for:

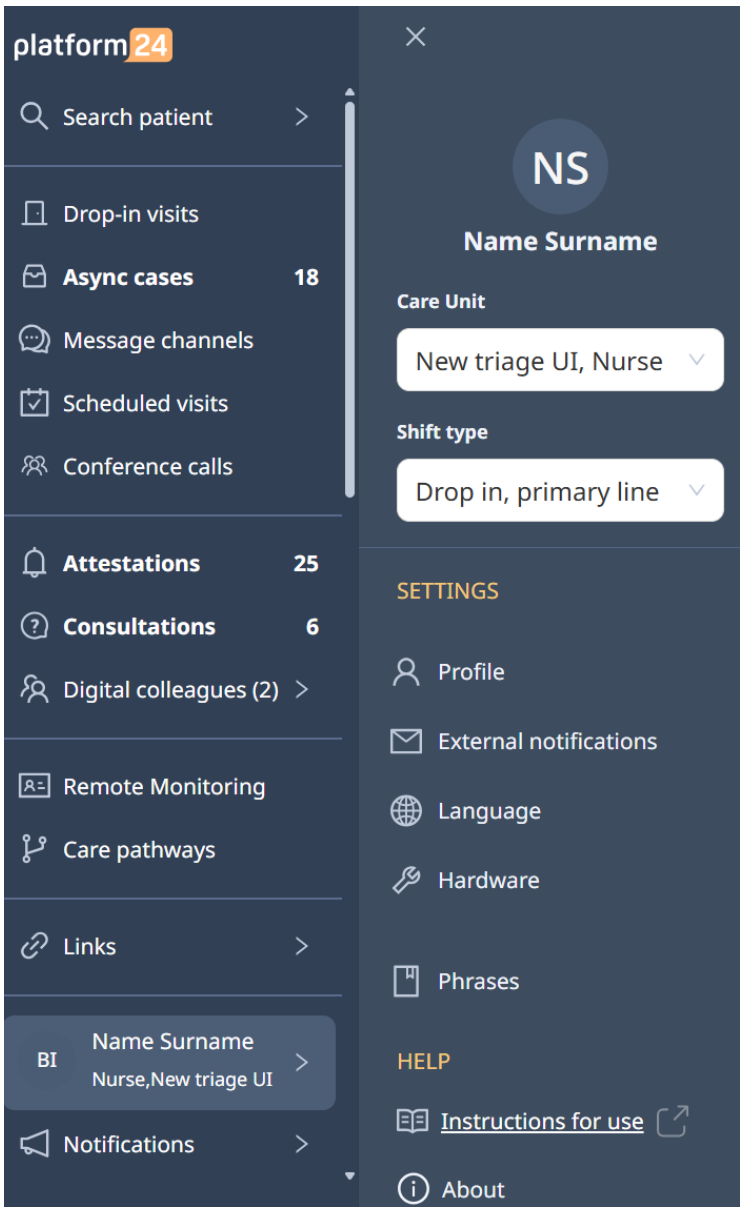
- High priority patients coming in via the drop-in list.
- Important actions related to an appointment (e.g., if you are invited to an appointment, or if someone has handed over an appointment to you)
- Important actions related to a consultation

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



10.17. Your profile

Click on your name in the main menu to open your personal settings.

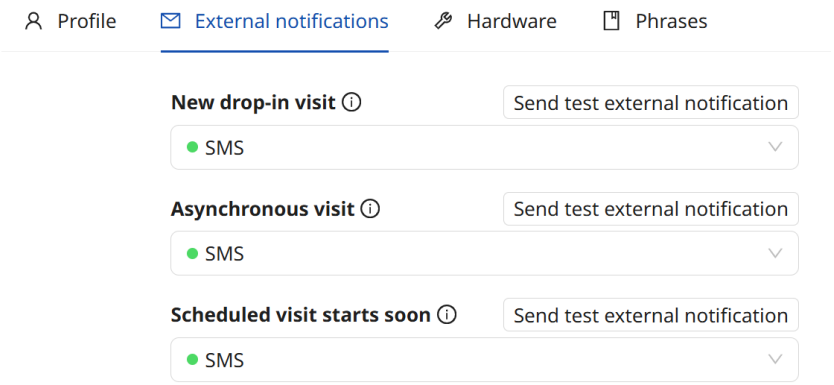


- **Care unit**: The care unit you are logged in to.
- **Shift type**: Here you can select shift type, see Shift type [16].
- **Profile**: Click on this to edit your profile (your name, title or contact details), see Profile [102].
- **External notifications**: Enables external notifications of *new asynchronous messages* or *new patients*.

  Select to receive external notifications via "*SMS*", "*Email*", "*Phone*" or "*No external notifications*".

  A scheduled appointment notification notifies you 10 minutes before one of your scheduled appointment starts. Unlike other notifications, this is also sent even if you do not have an active shift.

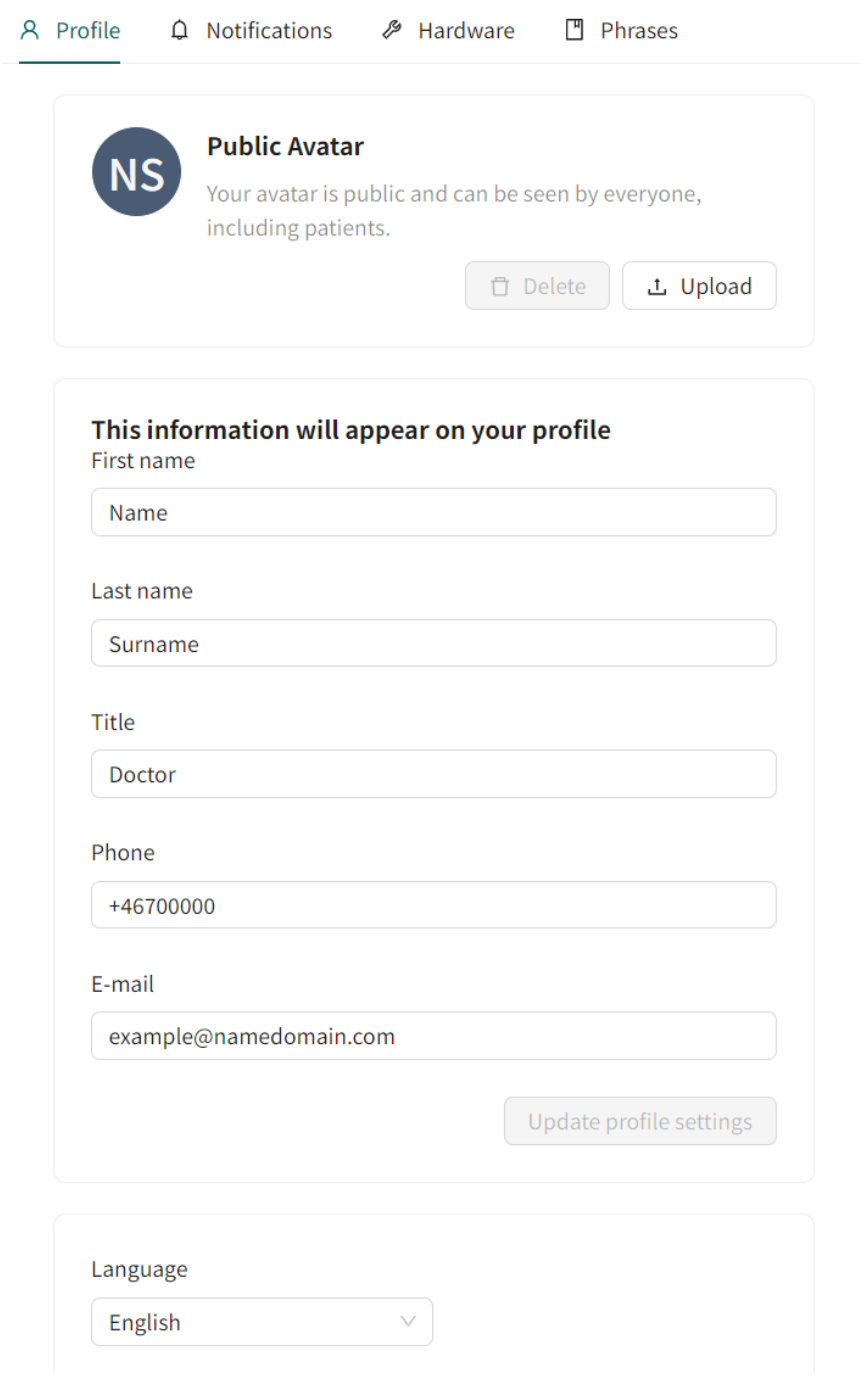
It is recommended to test the external notifications straight away using the **Send test external notification** buttons.



- **Language**: Specify the language you want to use in Clinic. Communication with the patient is not affected by this selection.
- **Hardware**: Test your hardware.
- **Phrases**: Manage personal phrases. See Add personal phrases [103].
- **Instructions for use**: Link to the part of the Platform24 website where the instructions for use for Clinic and other interfaces/products can be found.
- **About**: Information about the medical devices Triage24 and Smart Care Plans and links to their instructions for use.

10.17.1. Profile

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



10.17.2. Add personal phrases

Phrases are pre-formulated messages that can be sent by practitioners to the patients in the patient chat. By using phrases, appointments can be conducted more efficiently and patient interactions can become more consistent. Your care unit's phrases (as well as the phrase categories) are set up by an administrator in the user interface Manage.

For more information about adding phrase categories in Manage, refer to the Manage Instructions for use.

In addition to the general phrases created for your care unit, it is also possible for you to create your own personal phrases. Note that you can only create phrases to an already existing category. If you are missing a category, talk to your administrators.

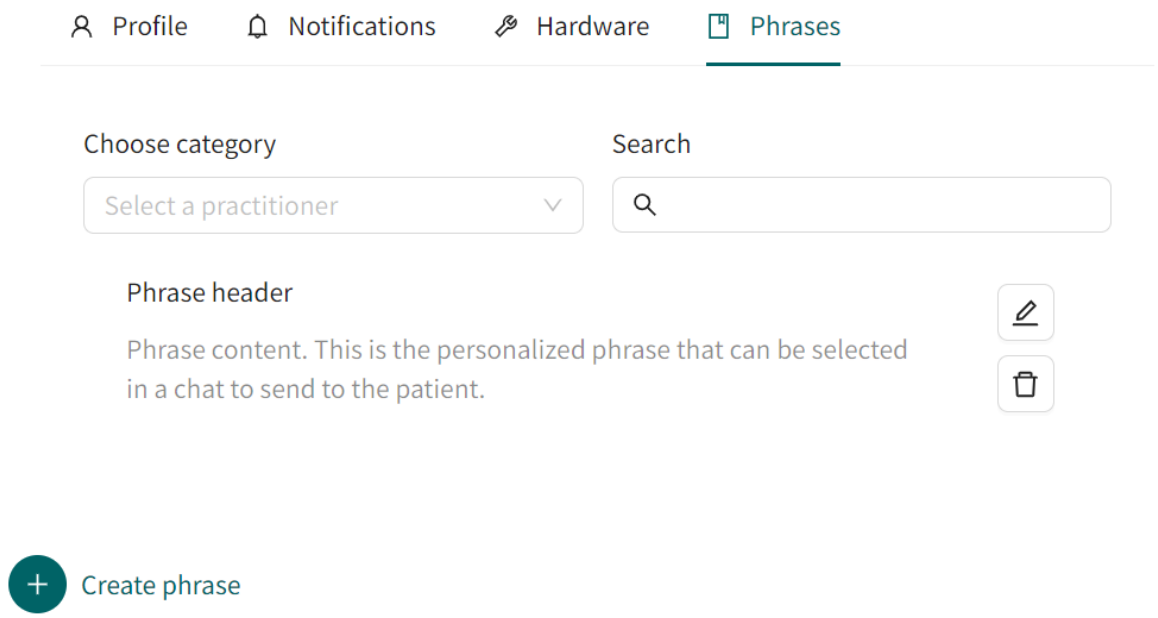
NOTE
Keep in mind that only the creator of the personal phrase will have access to it.

In the **Phrases** tab, you can both view:

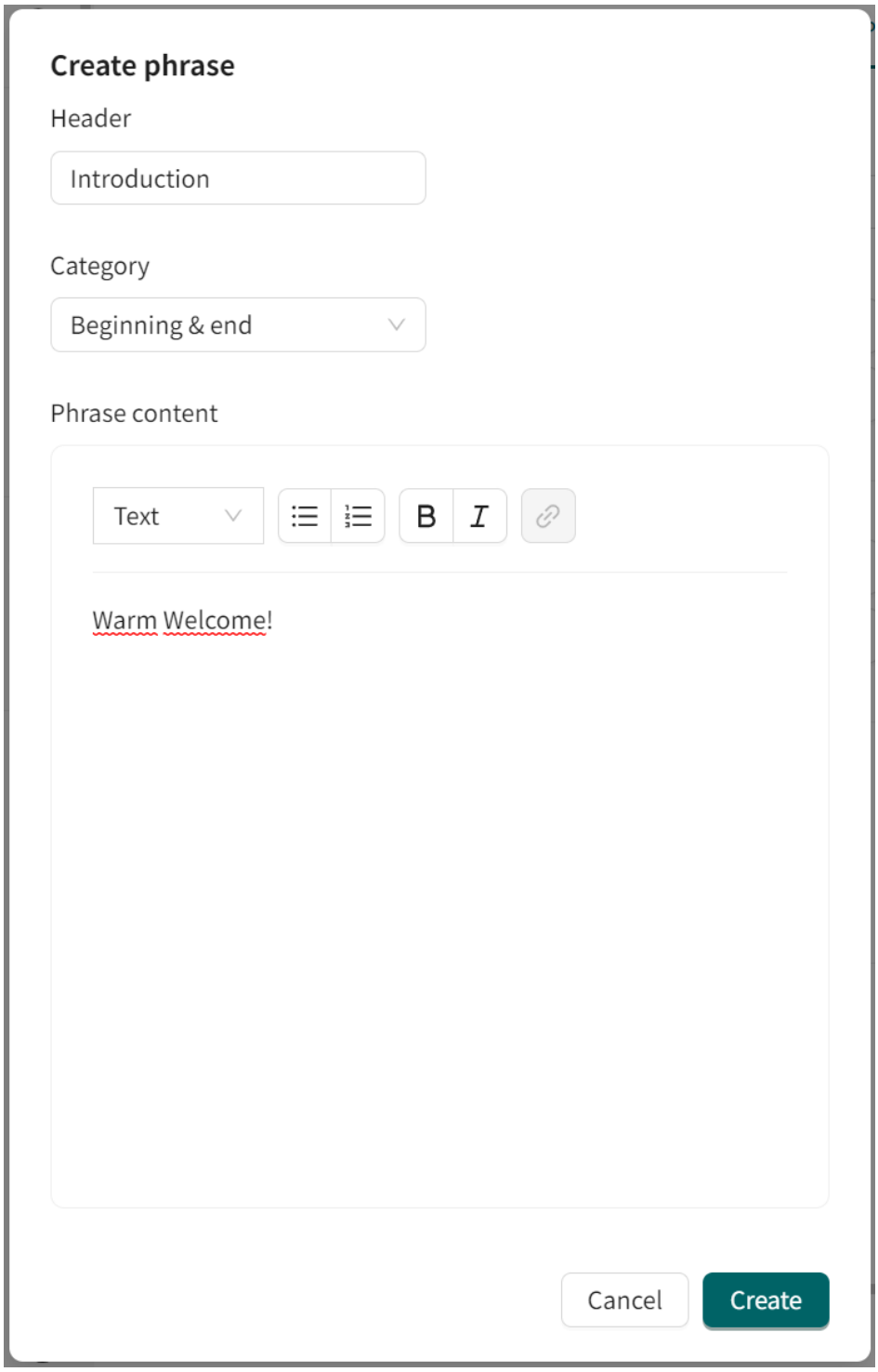
- **Your own personal phrases** (if you have created any). You can edit or delete them by clicking the corresponding buttons.
- **Your care unit's general phrases**. These can be viewed but not edited or deleted.

To add a new personal phrase:

1. Click the **Create phrase** button in the lower left corner of the **Phrases** tab.



2. Enter a title in the **Header** field and select **Category**.



3. Type the phrase in the **Phrase content** area. The following formatting options that can be used when creating a phrase:

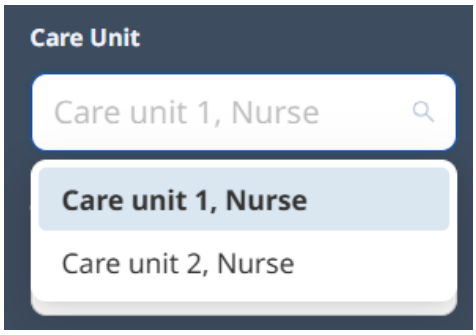
Text style	Specify heading levels (H1-H6) and normal text
Bulleted list	Create a bullet list
Numbered list	Create a numbered list
Bold style	Specify bold text style
Italic style	Specify italic text style
Add link	Add a link

4. Click **Create**.

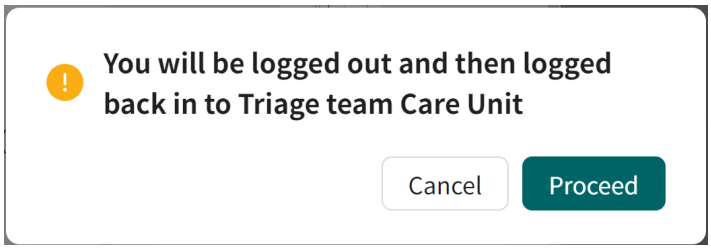
To edit or delete a

10.17.3. Change care unit

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



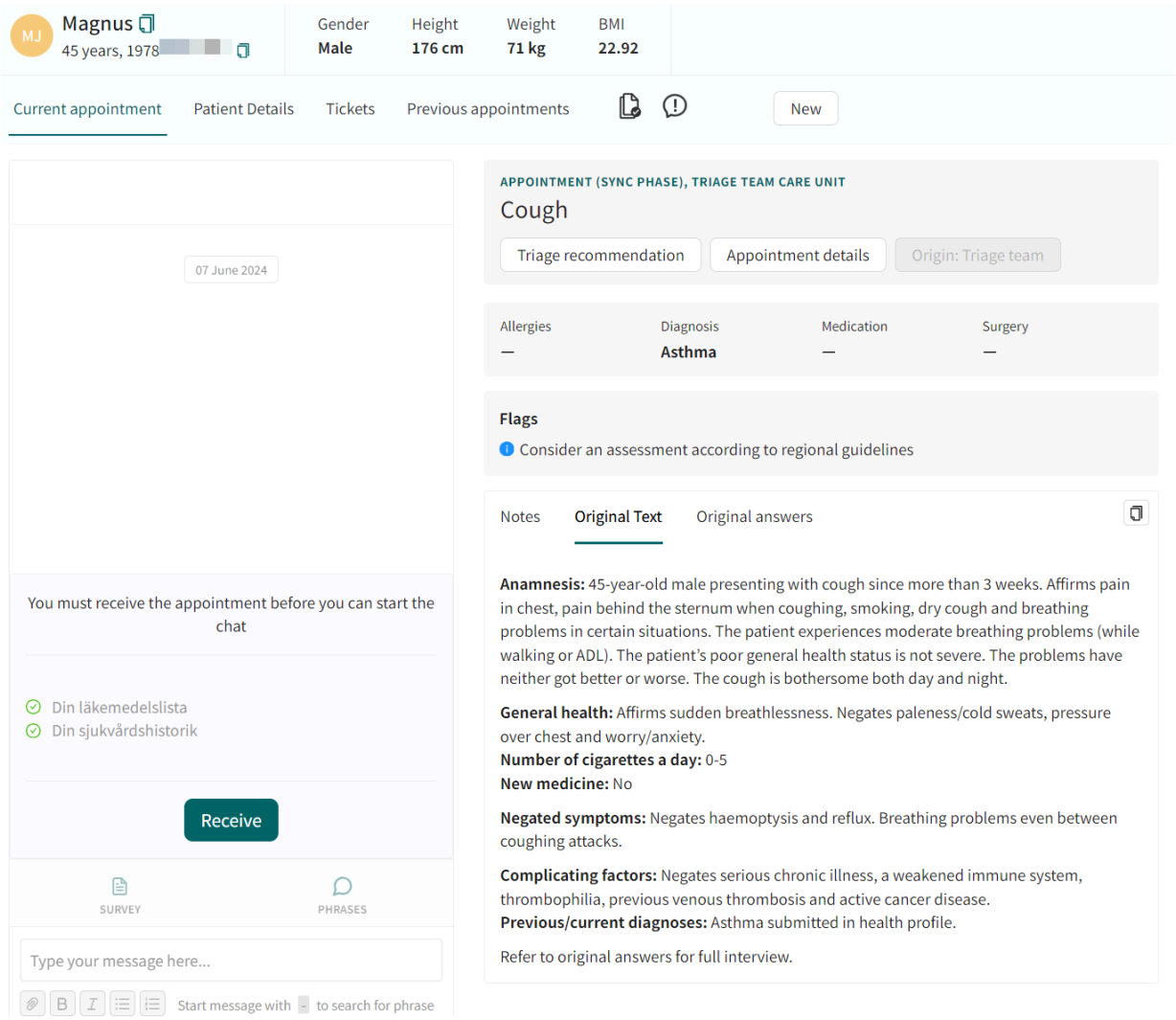
2. Select **Continue** - you will now be automatically logged out of your current care unit and logged in to the new one.



11. Visits page

11.1. Overview

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



11.2. Page header

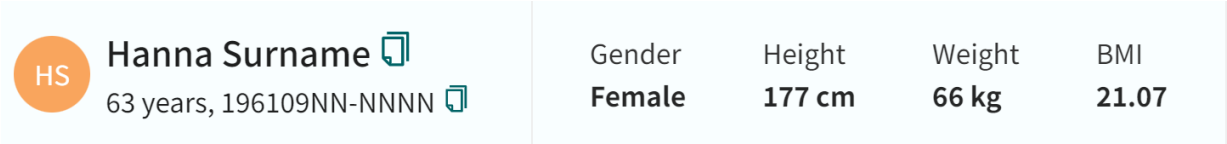
The header contains the basic data for the current patient, indication of patient connection status as well as warnings and information about protected identity (if applicable).

Any warnings added for the patient are indicated by a red label. For more information about warnings and how to add them, see Warnings [125].



11.2.1. Basic data

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



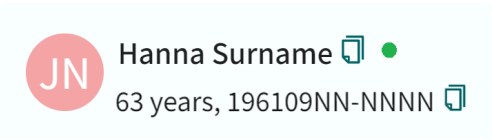
TIP

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



11.2.2. Patient connection status

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



NOTE

There may be a delay of about 60 seconds.

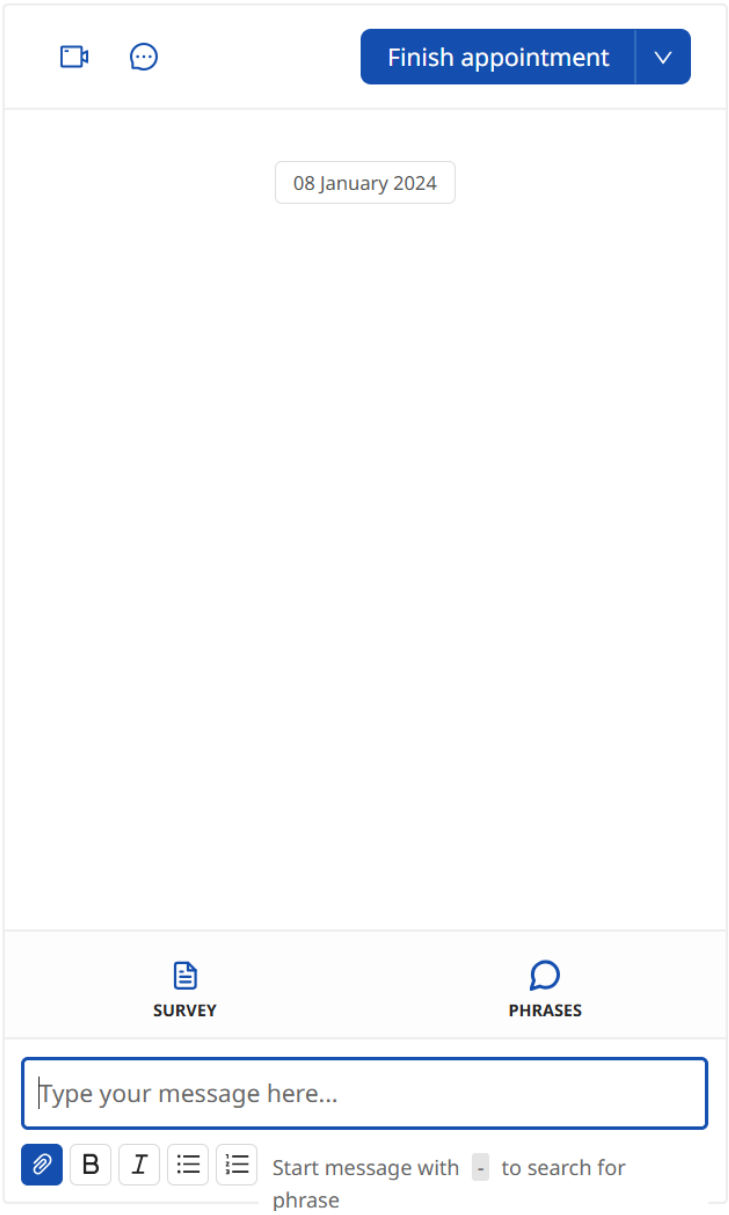
Table 1. Patient connection status - indicator colors

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

11.3. Current visit

11.3.1. Chat module

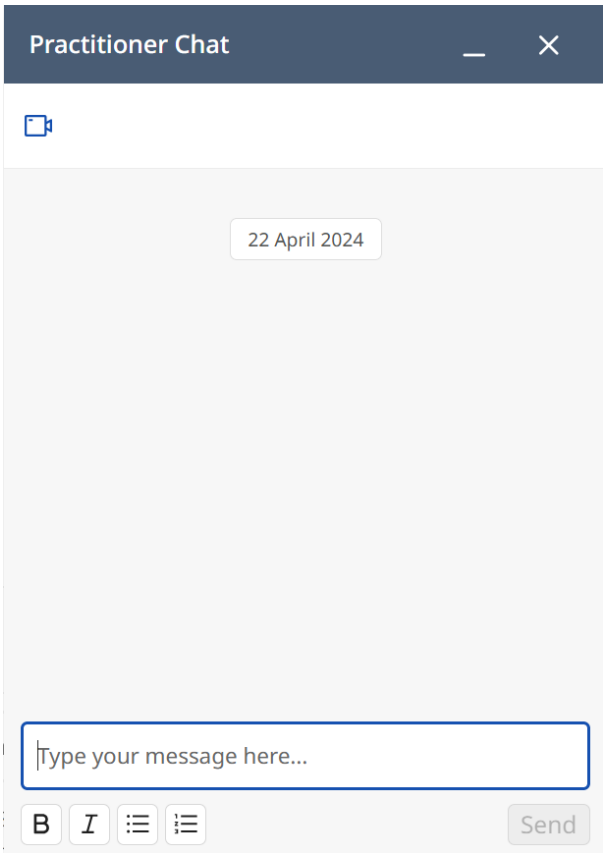
Visits always start in chat mode. When you receive a synchronous visit in the ledger and enter the chat module, there are no messages, only a button with the text **Start appointment**. The visit begins when you click **Start Appointment**. When you start the visit, an automated presentation is sent.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



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

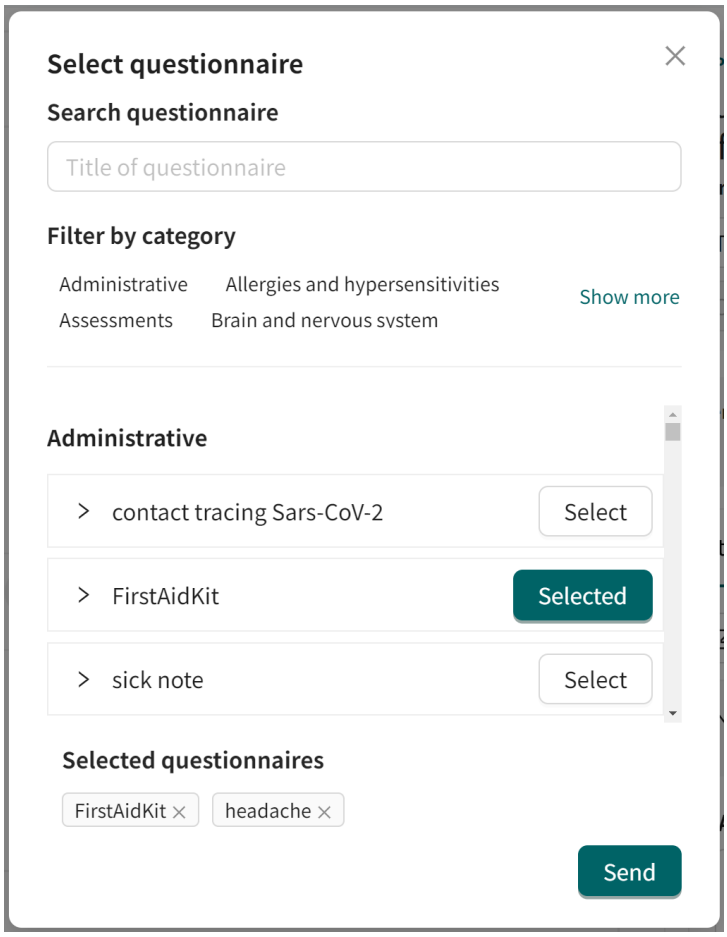
- Start video calls (camera icon). Ongoing and completed video calls are displayed with a message showing how long they took and who participated. For more information about video calls, see Initiating a video call with the patient in the chat [164].
- Start a practitioner chat with the practitioner(s) that have been added to the patient chat (chat icon). The practitioner chat will appear as a separate dialog, and these messages will not

be visible for the patient. For more information, see Inviting colleagues to the practitioner chat [170].



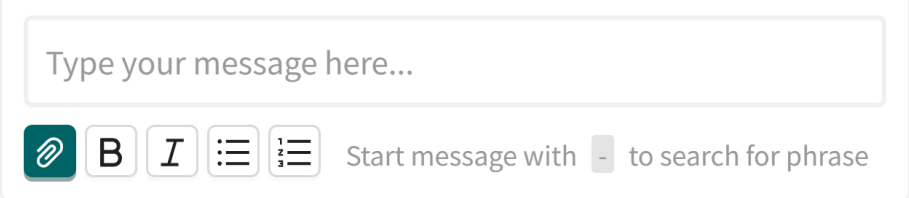
In the lower part of the chat module you can select to:

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



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

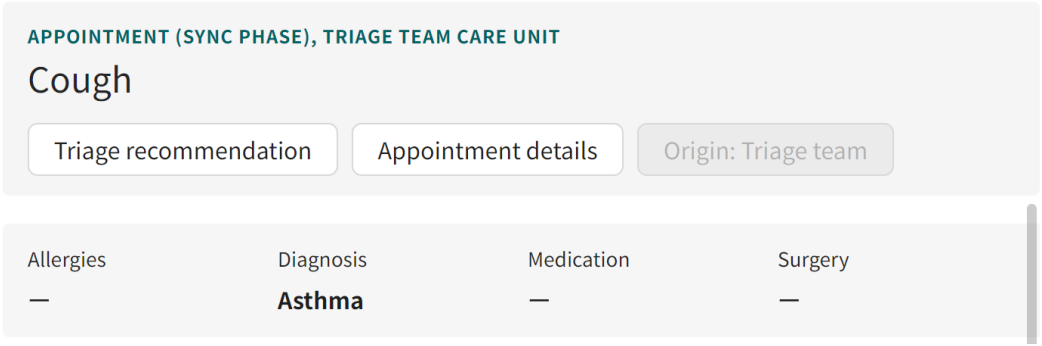
Below the **Type your message here...** field in the lowest part of the chat module, you can select formatting options for the message or select to attach a file.



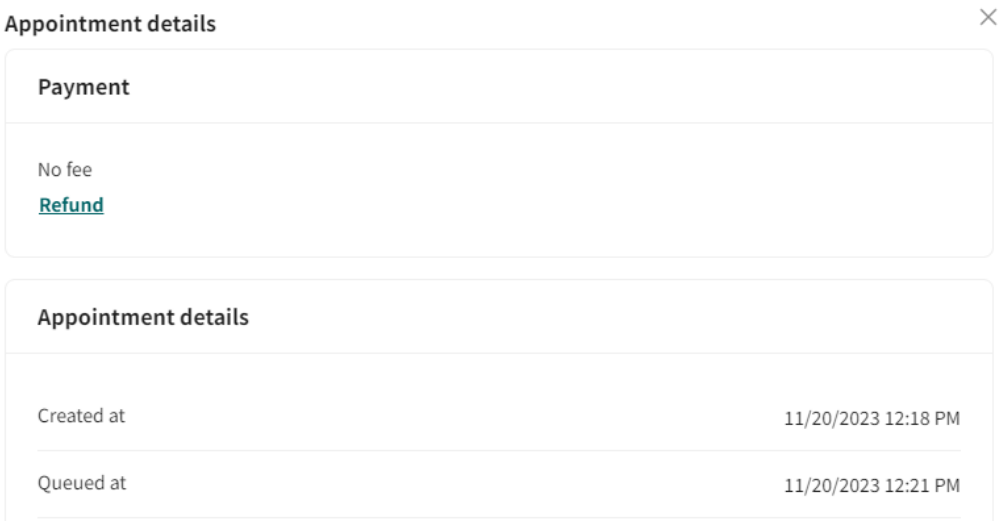
11.3.2. Visit overview

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

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

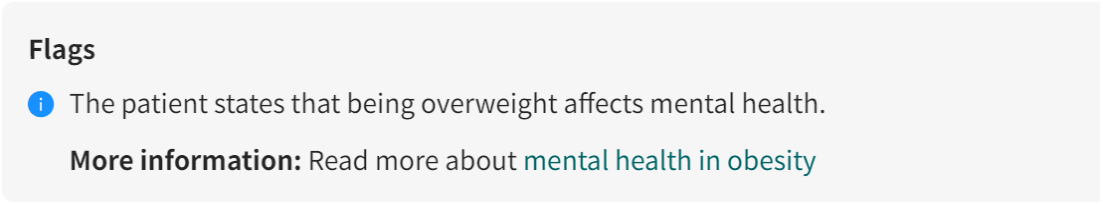


The visit details can be opened by clicking the **Appointment details** button.



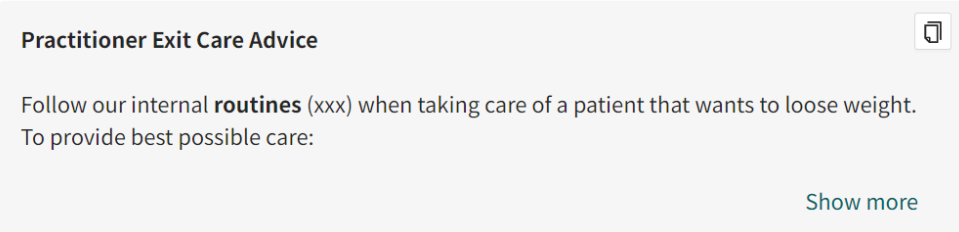
11.3.3. Flags

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



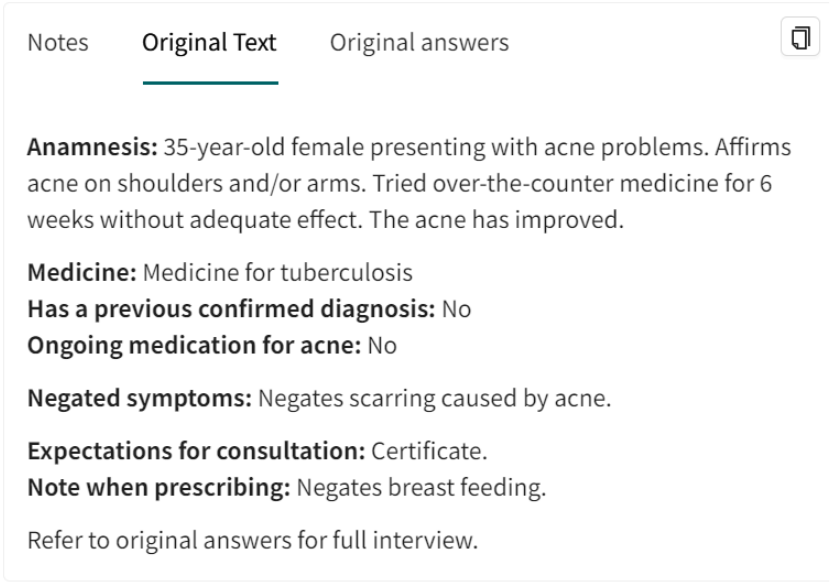
11.3.4. Exit care advice

If the healthcare personnel in Clinic receives a patient who has performed a triage that resulted in an exit care advice, and selected to meet with healthcare personnel online, the specific exit care advice will be presented in the visit.



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

11.3.5. Medical record notes



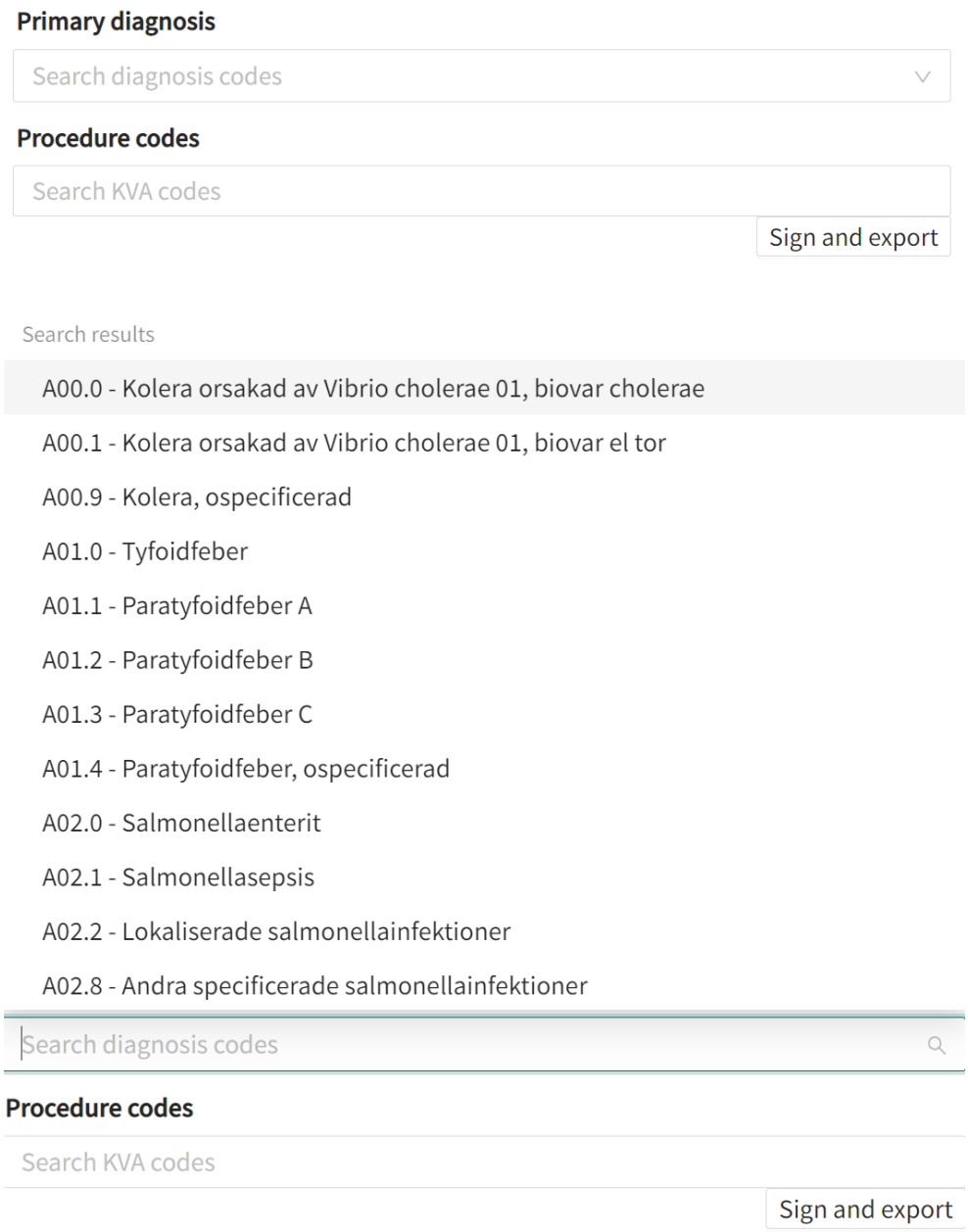
The medical record notes section contains the following tabs: **Notes** (the patient's medical history), **Original text** based on the questionnaires the patient has answered, and **Original answers** from the patient.

Notes

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

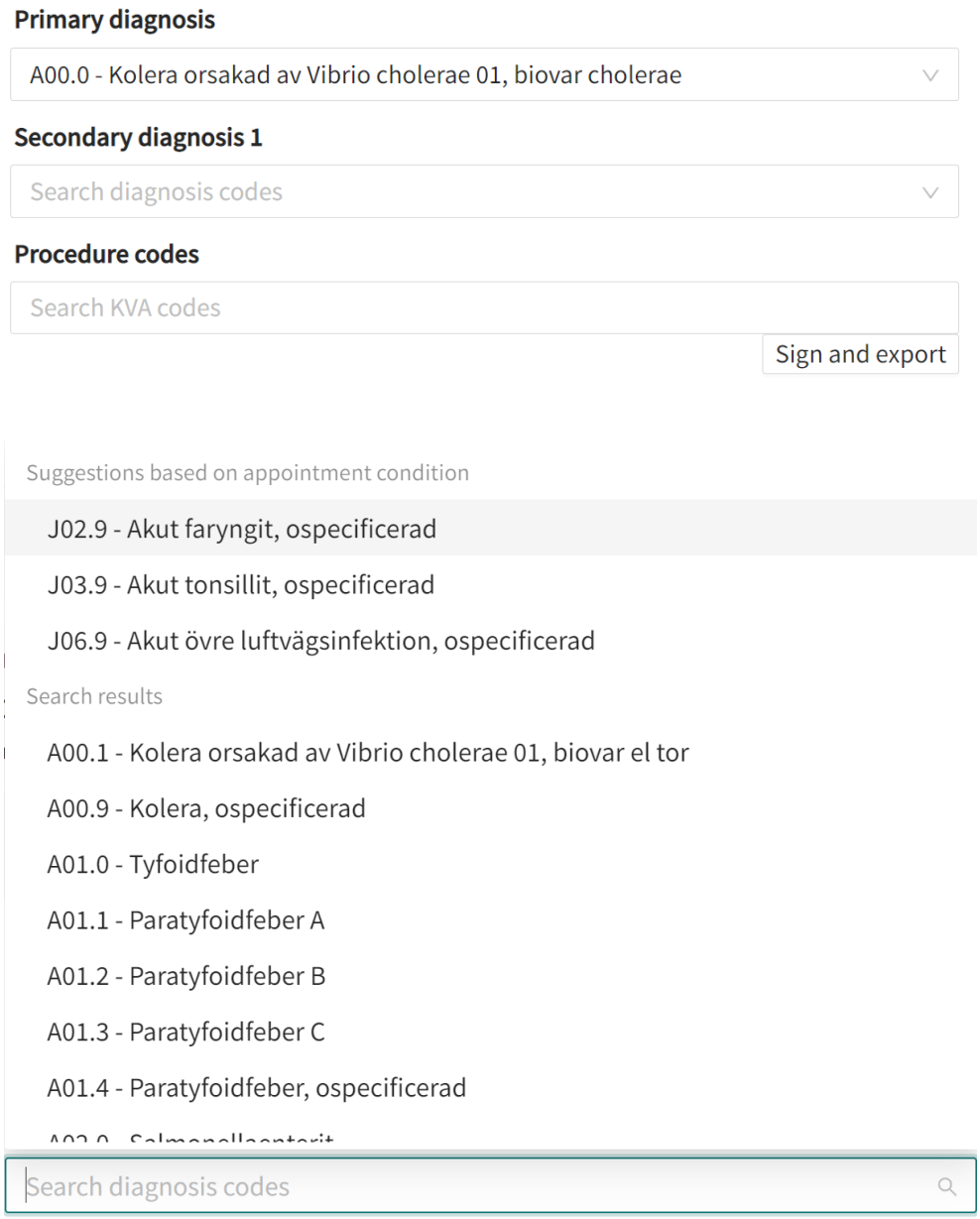
The patient's own medical history can be changed, and adjustments can be made while the appointment is in progress.

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



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

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

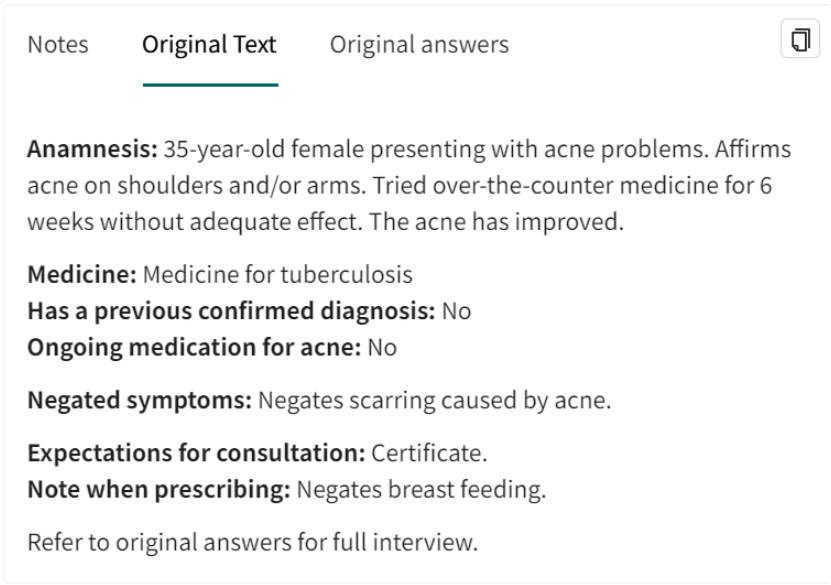


The note is automatically saved every few seconds.

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

Original text

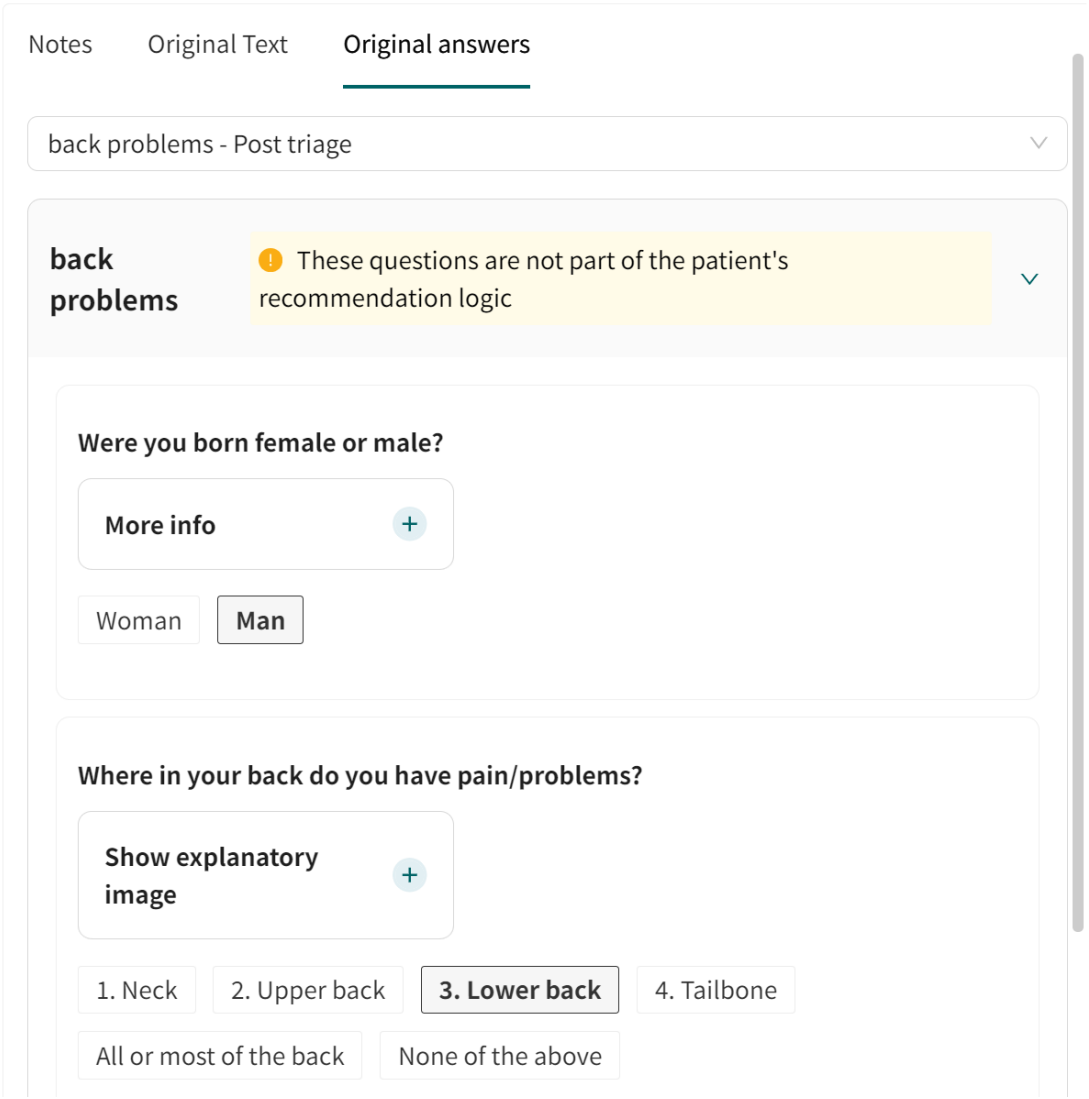
Under the **Original text** tab, you can see the automatically generated proposal for a medical record text, based on the questionnaires the patient has answered before and during the appointment.



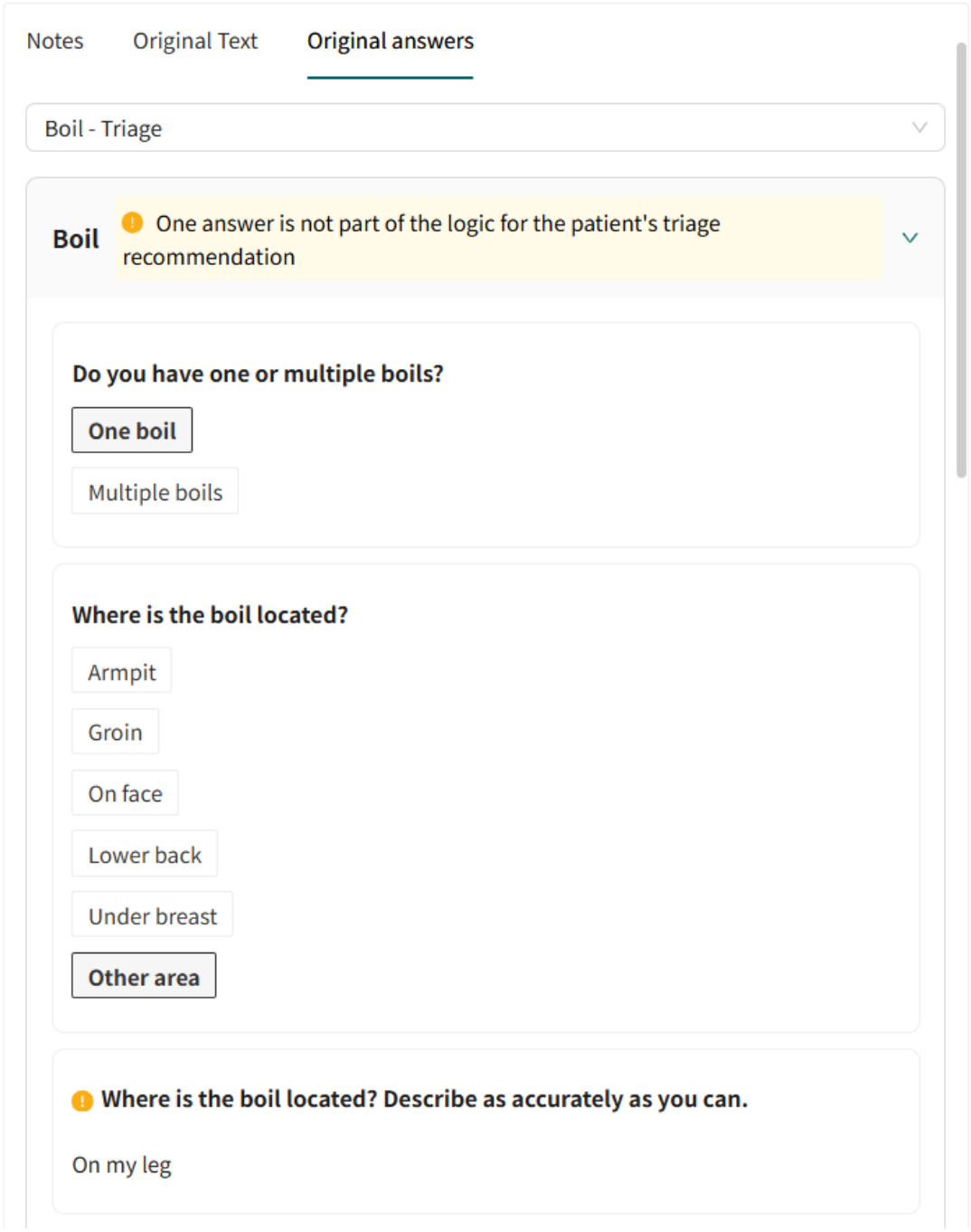
Original answers

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

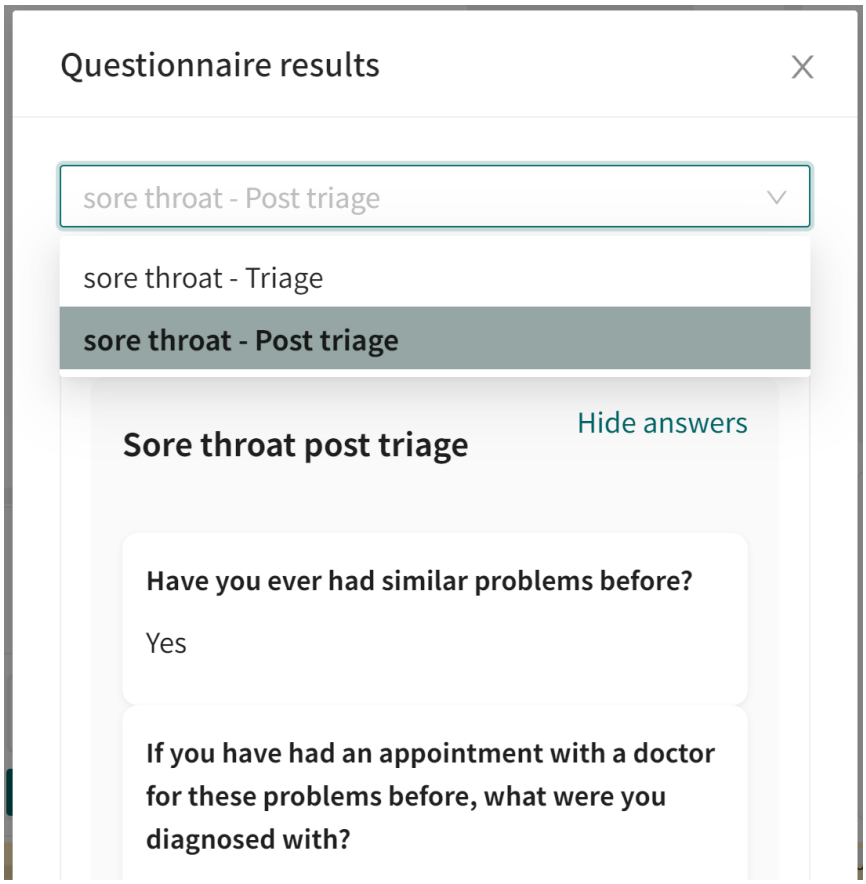
This original answers section will also present what part of the interview or questionnaire that has been a part of the patient's triage recommendation logic.



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

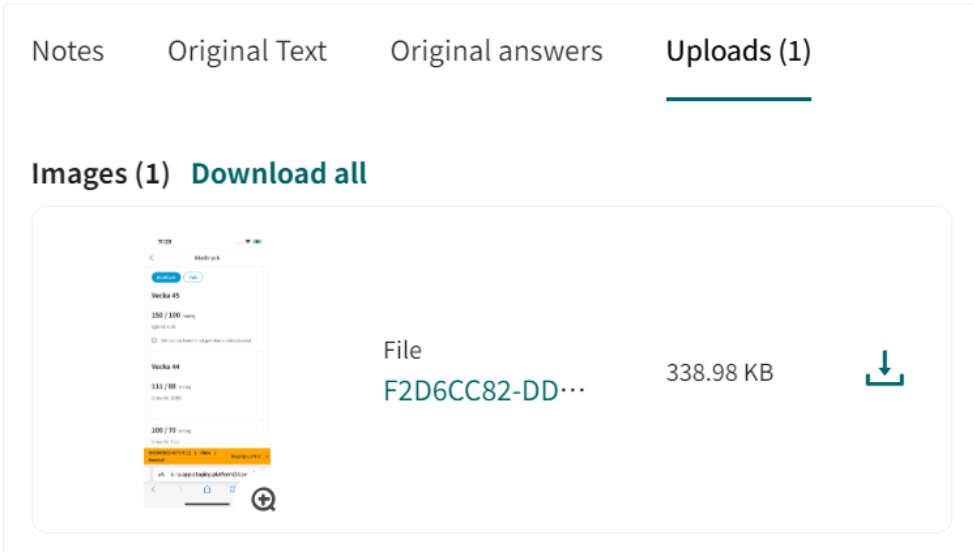

Notes
Original Text
Original answers
Boil - Triage
Boil
One answer is not part of the logic for the patient's triage recommendation
Do you have one or multiple boils?
One boil
Multiple boils
Where is the boil located?
Armpit
Groin
On face
Lower back
Under breast
Other area
Where is the boil located? Describe as accurately as you can.
On my leg

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



Uploads

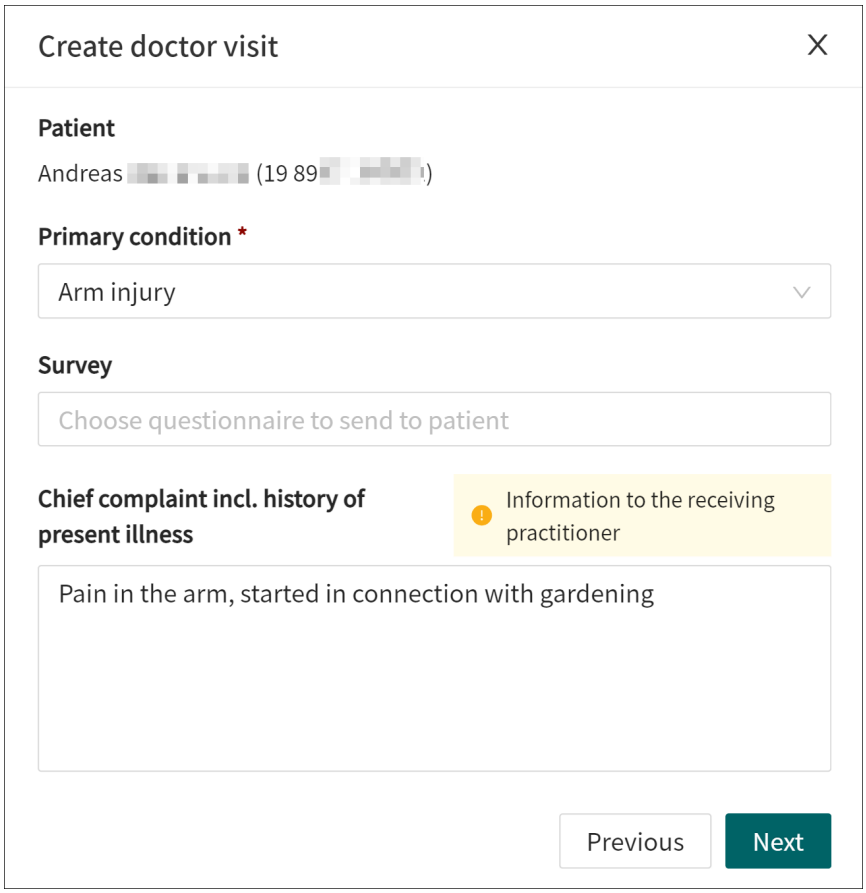
Any PDF-files or images that the patient has uploaded via a questionnaire are listed in the **Uploads** tab. Note that this tab only will be visible when something has been uploaded.



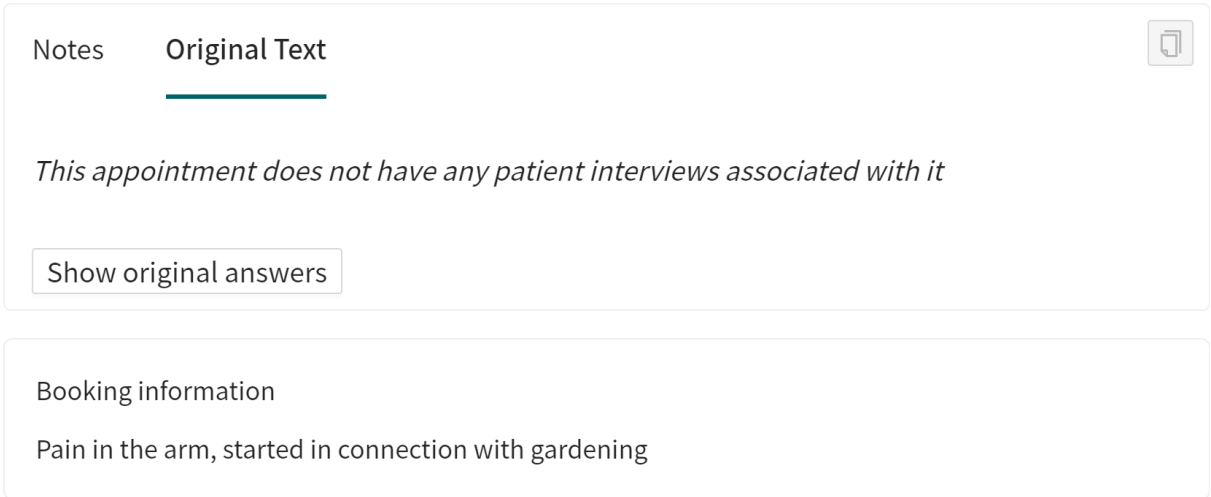
Appointments booked by practitioners

To distinguish information from the patient and from healthcare practitioners, information from the practitioners is presented later in its own information box under the medical record note.

This is done in cases where healthcare practitioners have booked a scheduled appointment and entered medical history information when the appointment was created, like in this example:



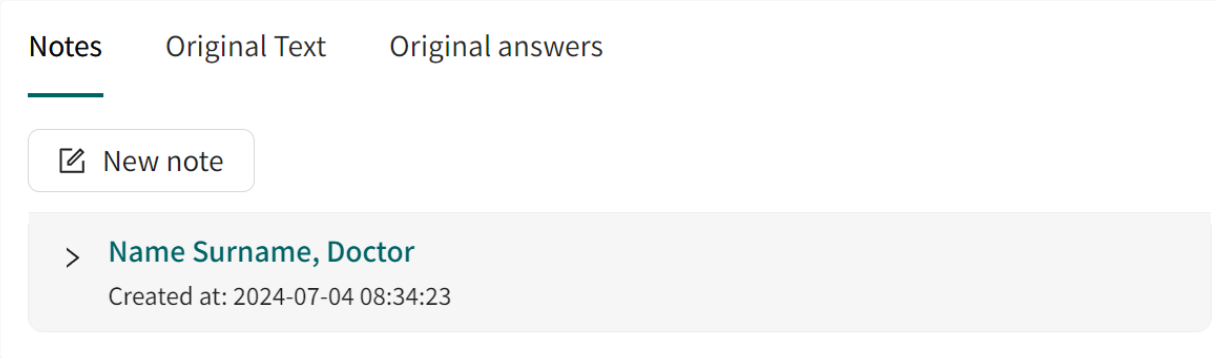
The heading for the information box is **Booking information**. The information box is not displayed when there is no information to show.



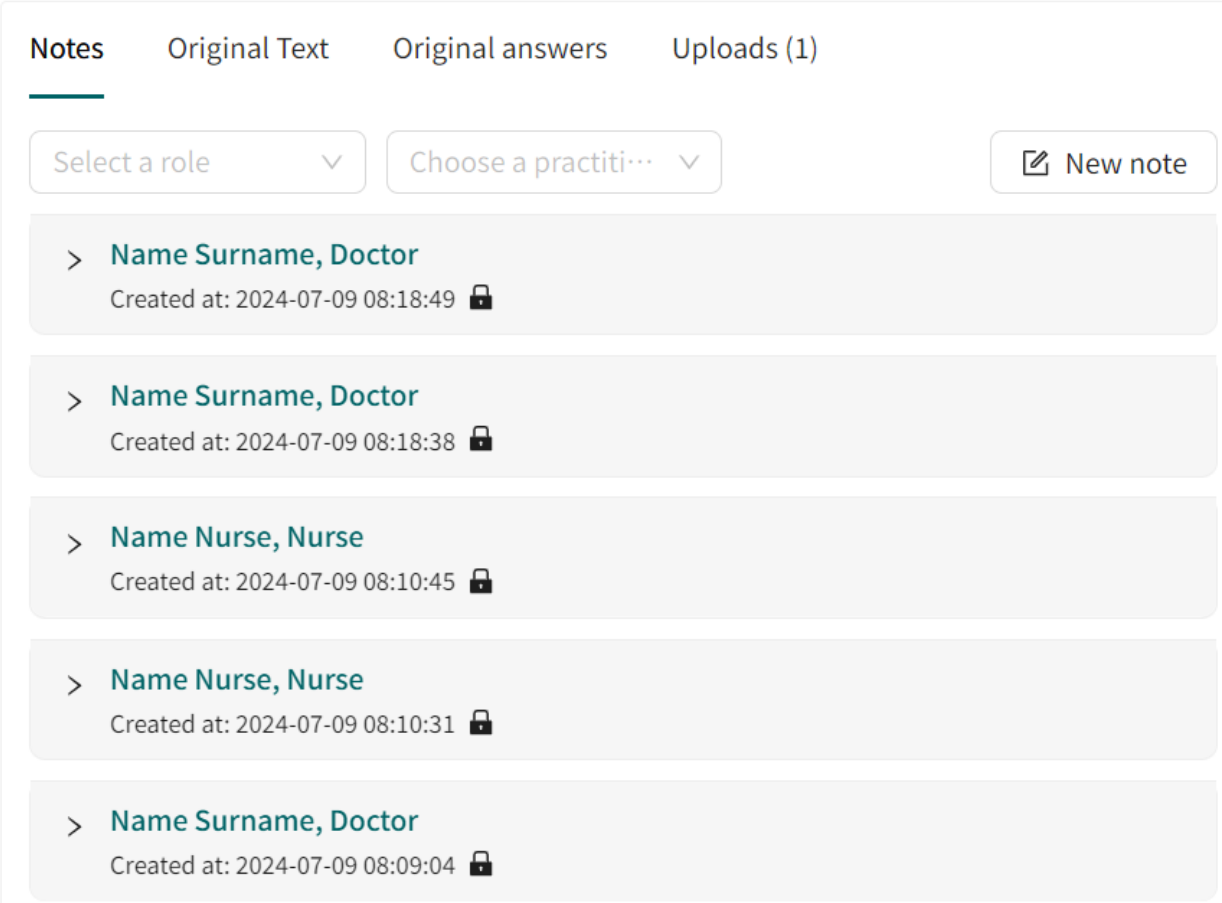
Multiple medical record notes

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

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



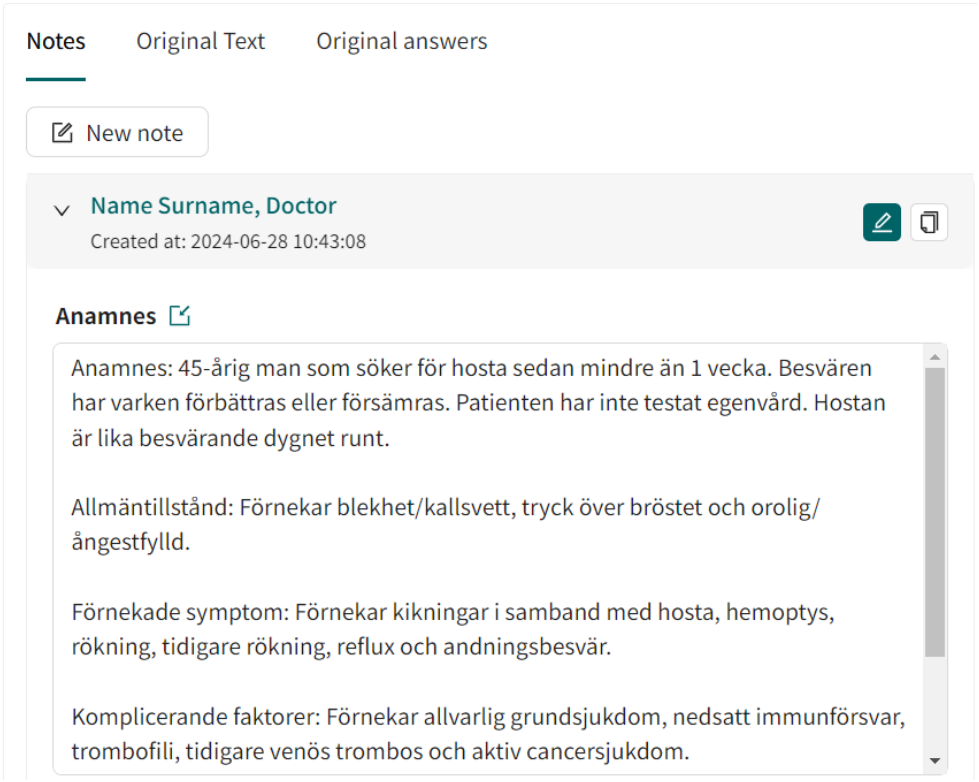
If there are more than five notes per appointment, a field with filters appears above the notes. Here you can filter on **Role** and **Practitioner**.

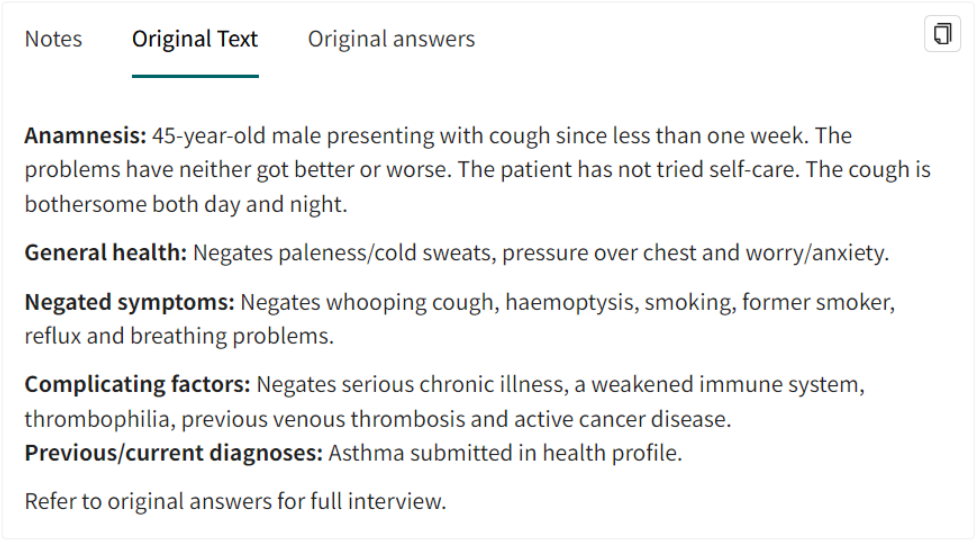


Keywords in medical record notes

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

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



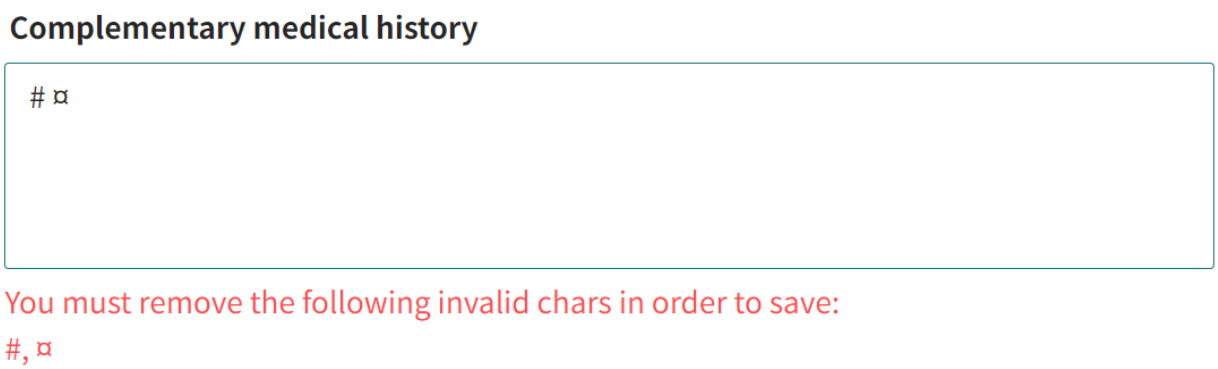


Allowed characters in notes

The following characters are allowed in notes:

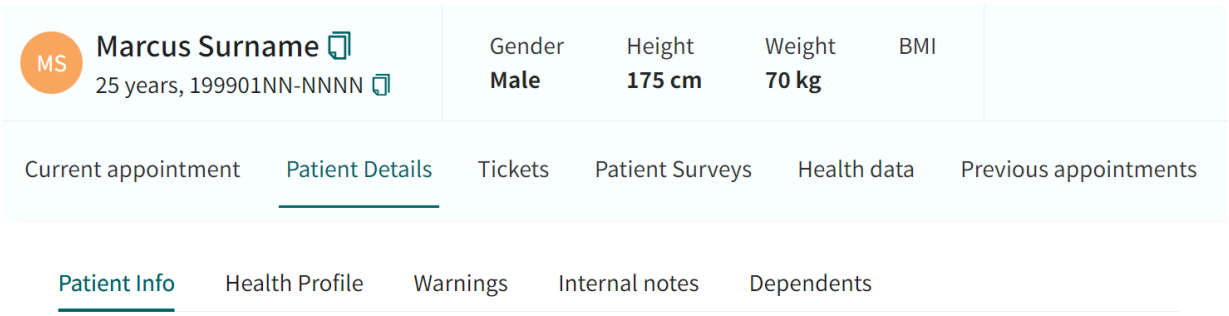
a-ö, A-Ö, æ, ø, 0-9, ()!?+-%*;:,."'=/@

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



11.4. Patient details

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



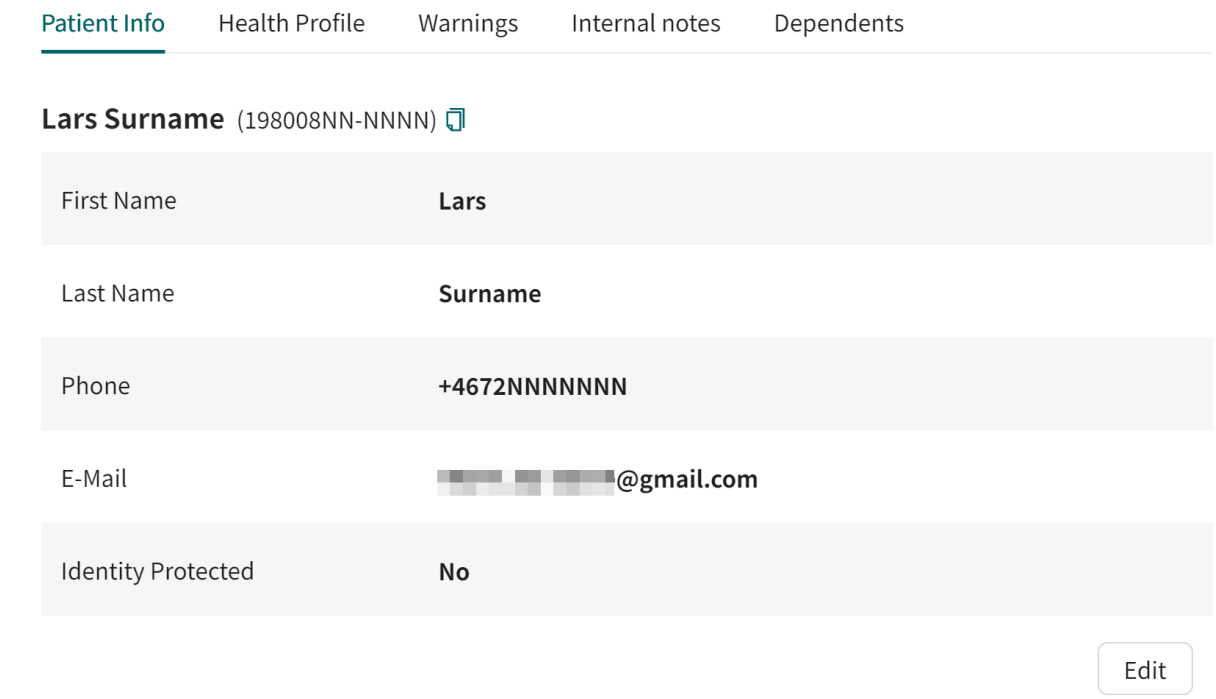
The **Patient Details** tab contains the following tabs:

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

See the upcoming sections for more information about these tabs.

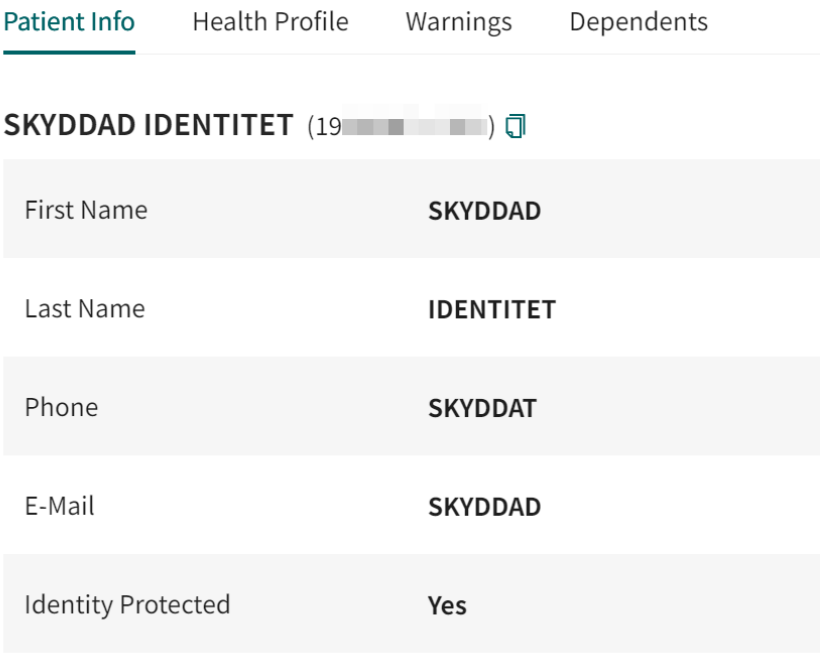
11.4.1. Patient info

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



Protected identity

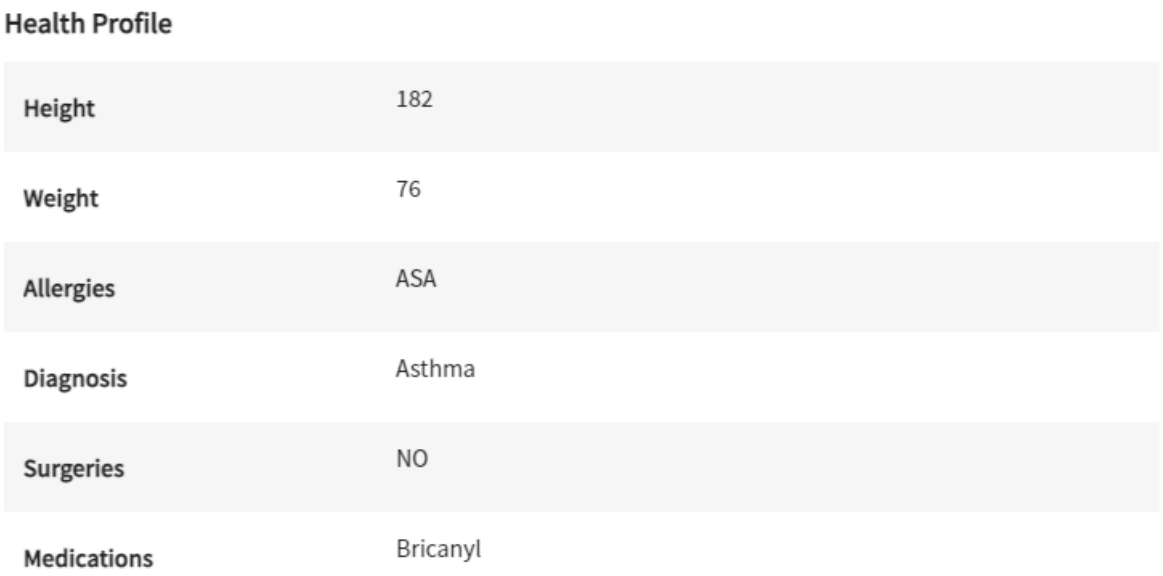
Patients can be marked with a protected identity either in Clinic, or by fetching information via integration to another system, which hides their names and contact details as shown below.



NOTE
You cannot withdraw a protected identity. Contact Platform24 if you need to change this information.

11.4.2. Health profile

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

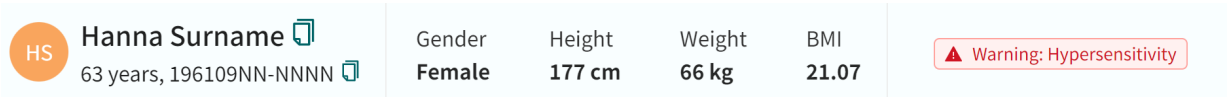


Patients can change their health profiles at any time in the Patient app.

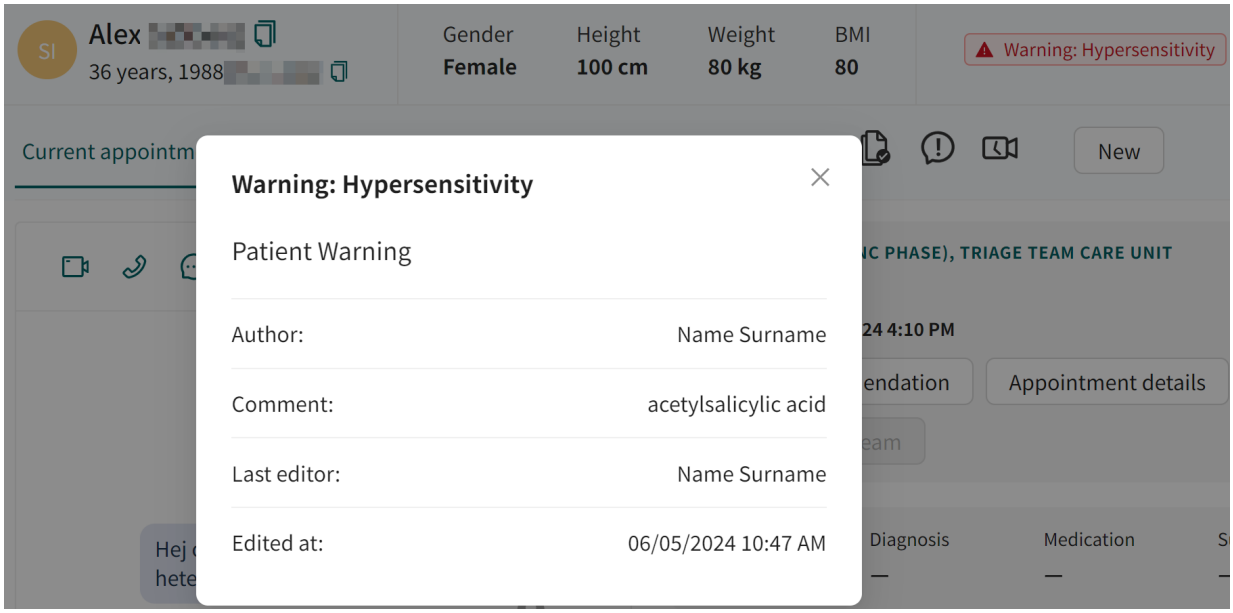
NOTE
If patients have not altered their health profile after completing it for the first time, it may not be up to date. It is therefore always important to double-check this information with the patient when it is relevant.

11.4.3. Warnings

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

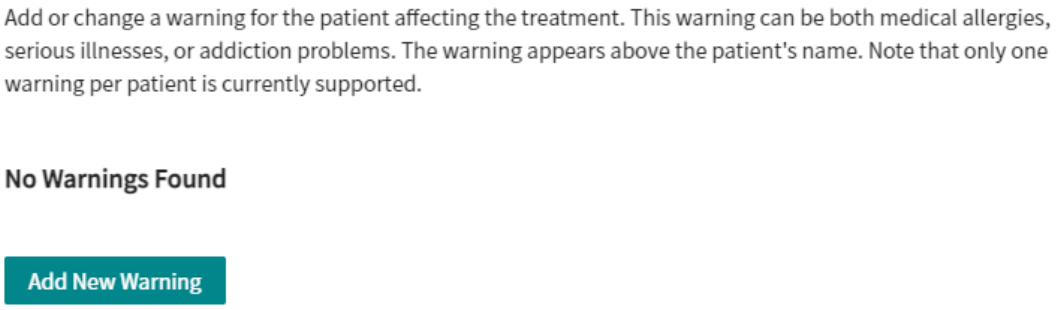


Click on the label for more information concerning the warning:

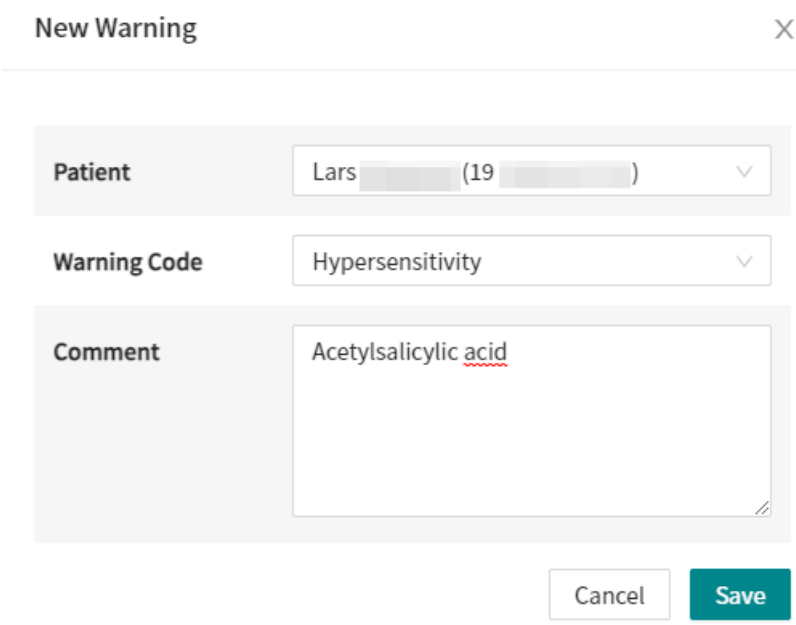


Adding a warning

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

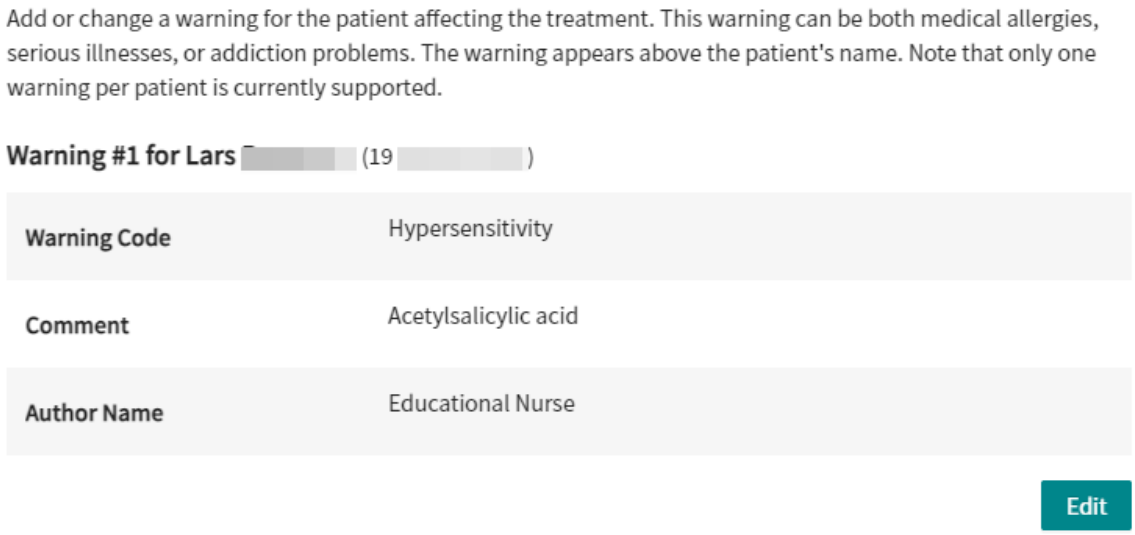


3. In the **New Warning** dialog, fill in:
   a. **Patient**
   b. **Warning code**
   c. **Comment**

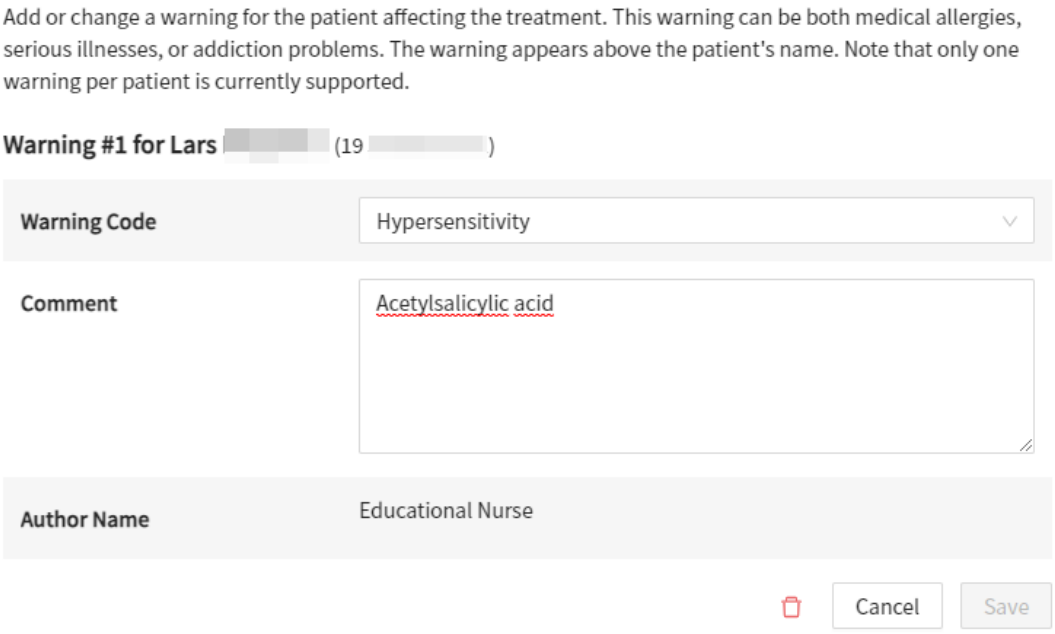


Editing or deleting a warning

1. Click on the **Warnings** tab.
2. Click **Edit**.

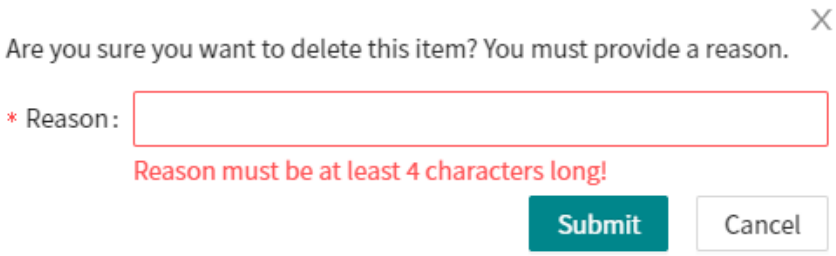


3. To change a warning:
   a. Add your changes to the **Warning Code** and **Comment** fields.



b. Click **Save**.

4. To delete the warning:
   a. Click on the red trash bin.
   b. Fill in the **Reason** why you want to delete the warning (required).

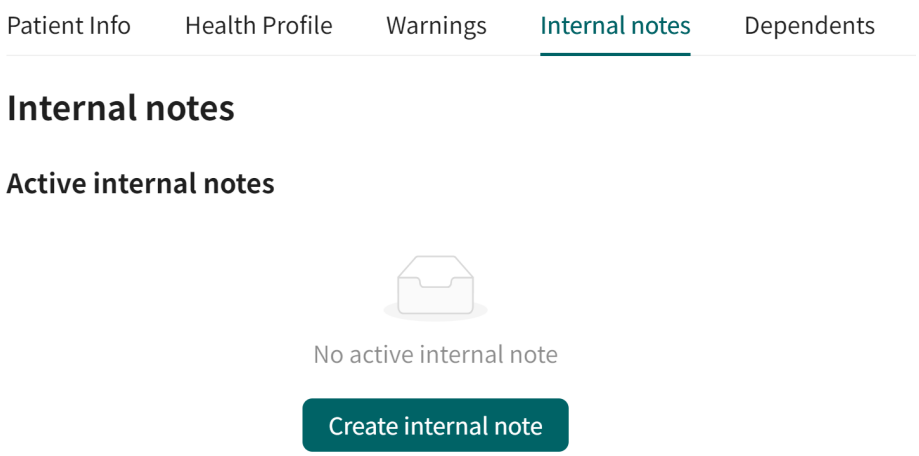


   c. Click **Submit**.

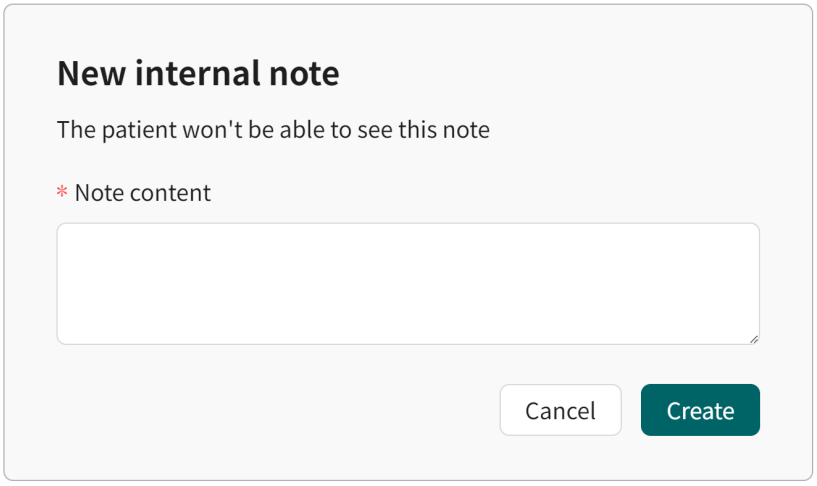
11.4.4. Internal notes

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

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



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

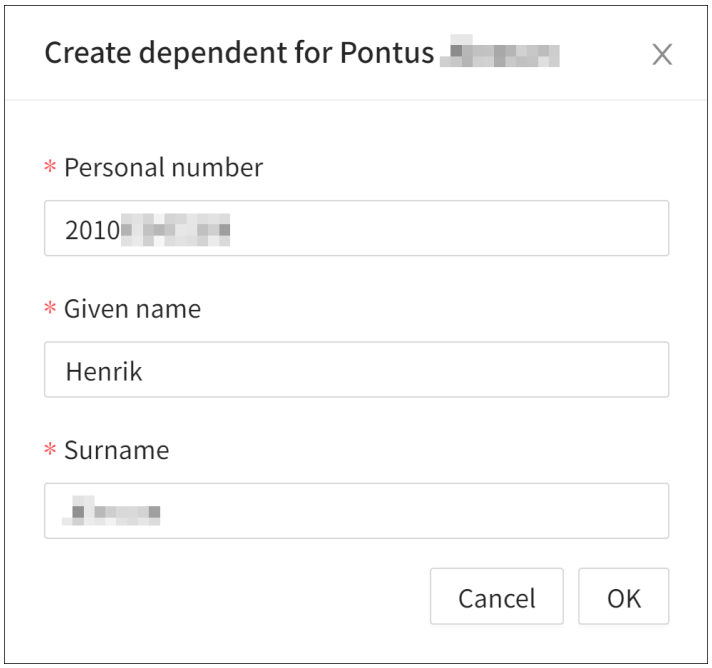


11.4.5. Adding children

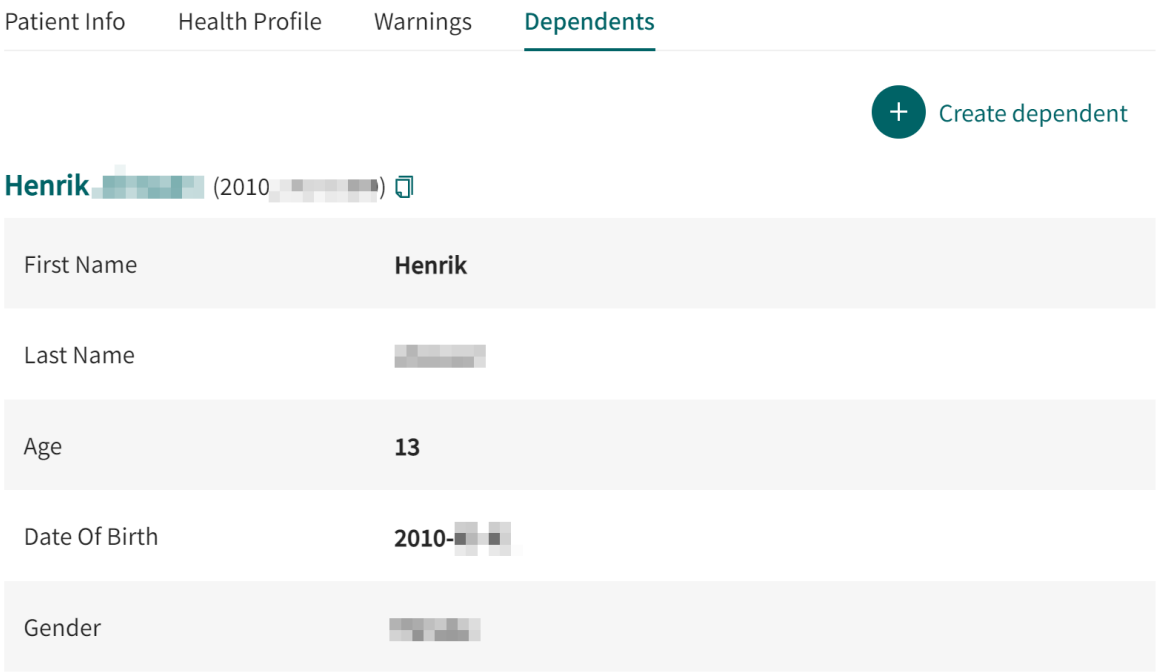
1. Click on the **Dependents** tab.



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



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



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

11.5. Tickets

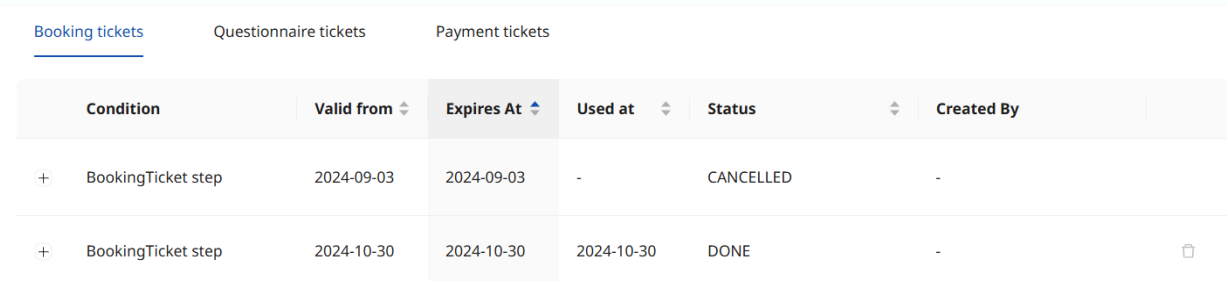
NOTE
This section applies to care units that are configured to send booking tickets.

11.5.1. Viewing created tickets

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

This view includes the following tabs:

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



In this list it is possible to view:

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

11.5.2. Creating new tickets

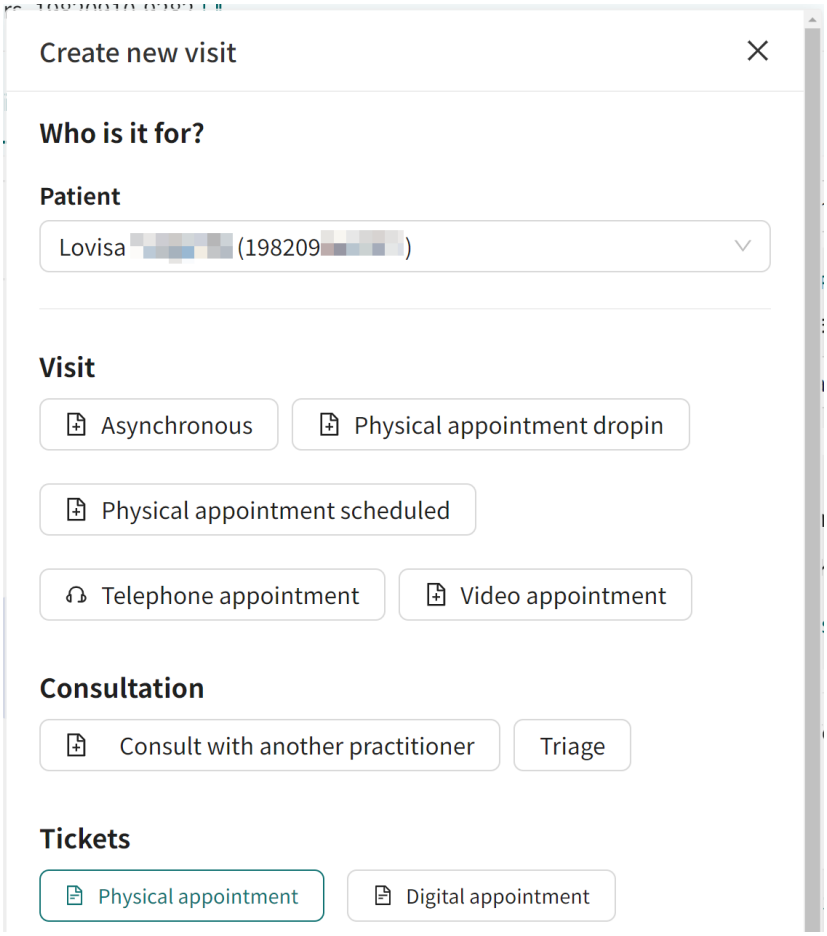
A ticket can be created for a patient at any time.

To create a ticket:

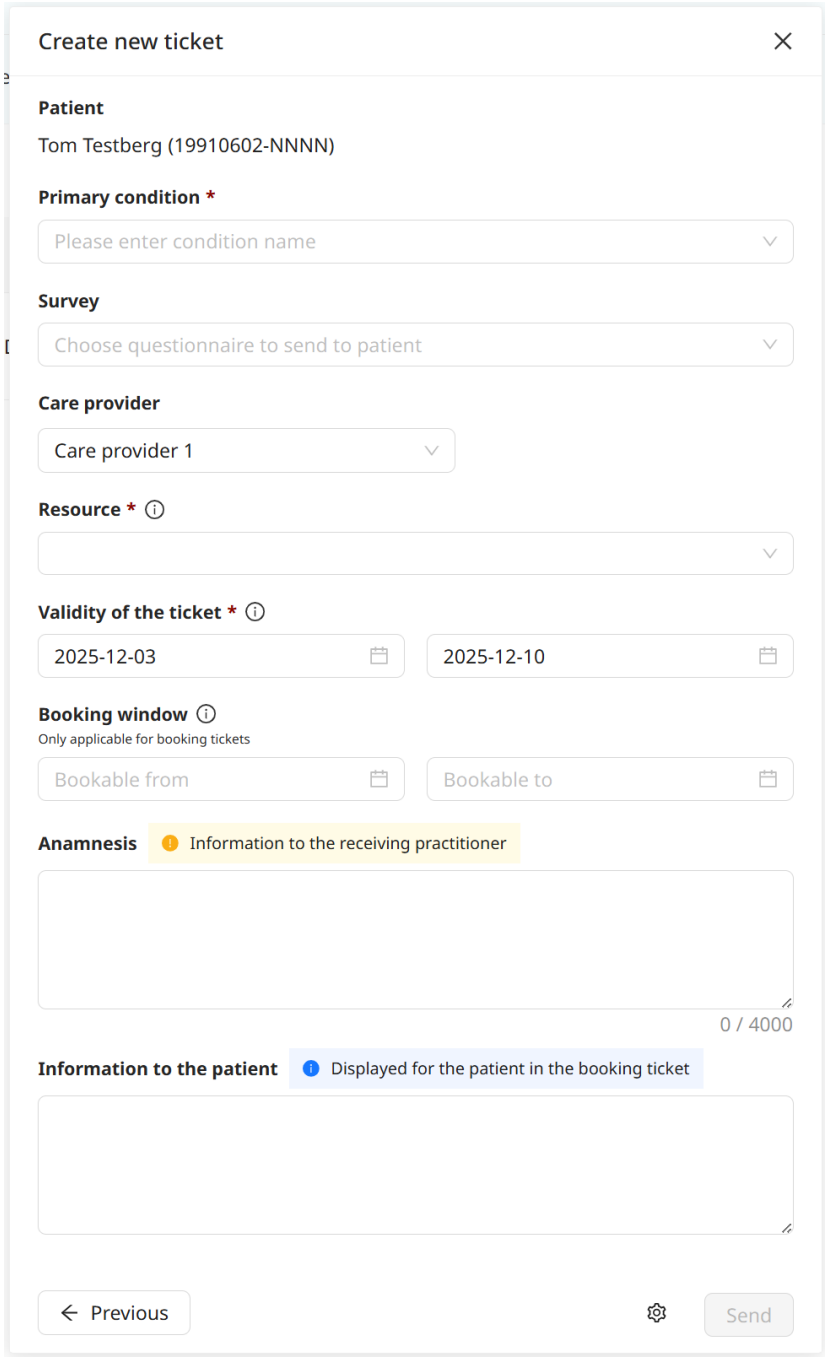
1. Click the **New** button in the visits page to open the **Create new visit** dialog.



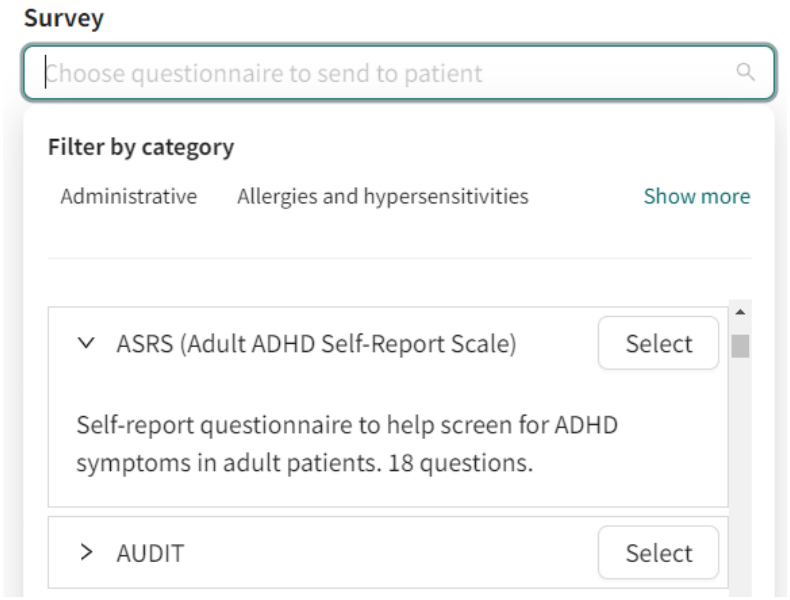
2. In the **Tickets** section, select the desired type of ticket (e.g., physical appointment, digital appointment, stand-alone questionnaire). The ticket names are determined and set for each customer.



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



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



c. Select **Care provider** for the appointment.

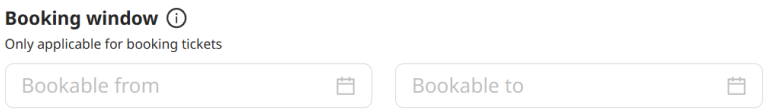
d. Select the **Role** of the practitioner and the **Care unit** you want to send the booking ticket to.

e. Select **Resource** to select a specific practitioner or role you want to send the booking ticket to. If this field is left empty, the booking ticket will be available for all practitioners at the selected care provider.



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

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



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

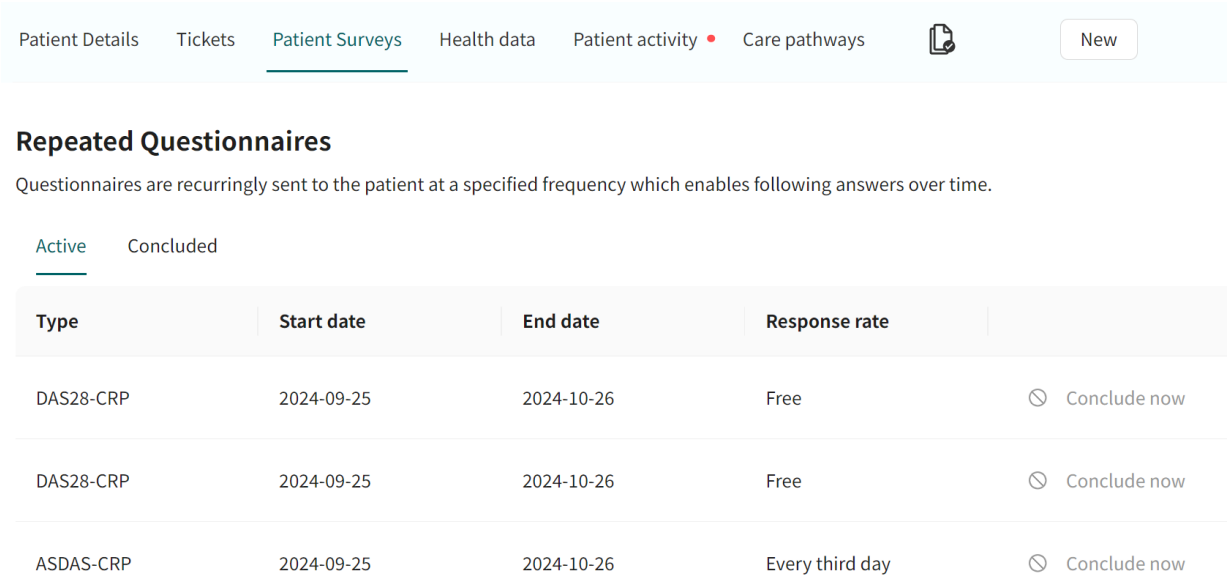
i. Add information that will be displayed for the patient in the booking ticket in the **Information to the patient** field.

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

5. Click **Send**.

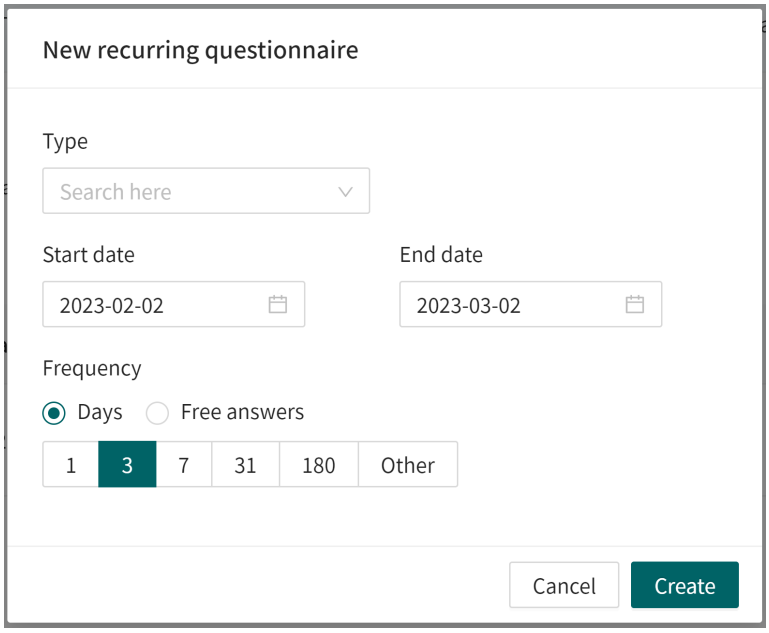
11.6. Recurring questionnaires

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



To create a recurring questionnaire:

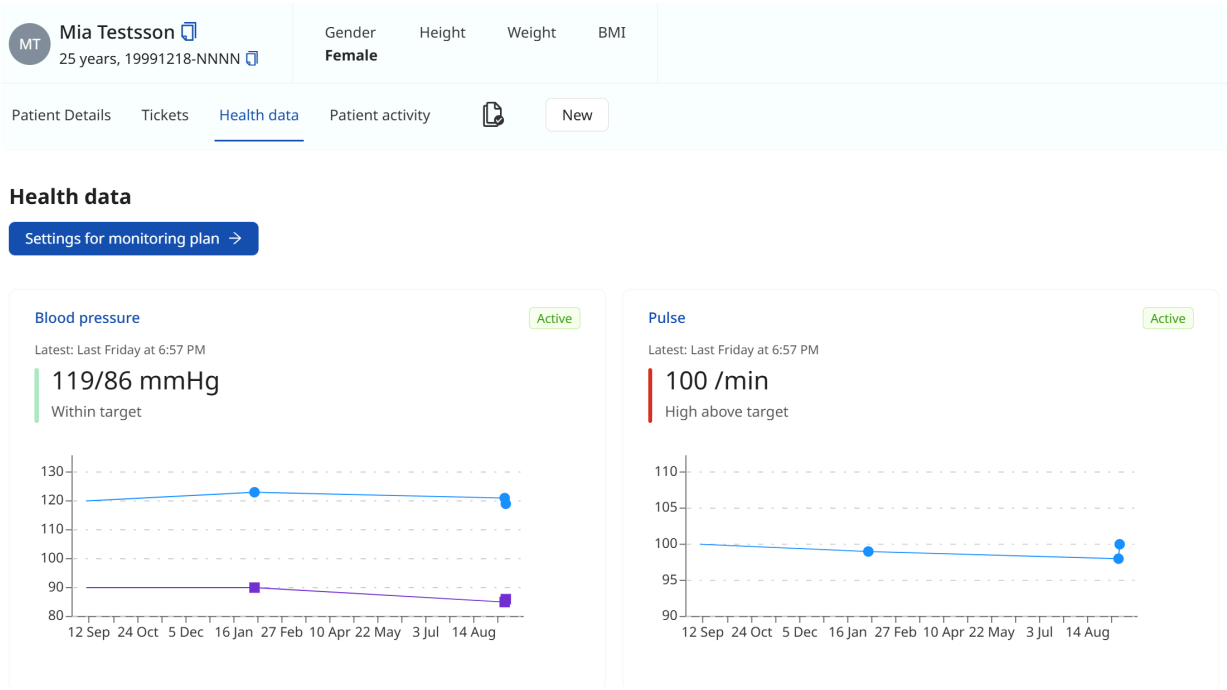
1. Click the **New recurring questionnaire** button to open the corresponding dialog.



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

11.7. Health data

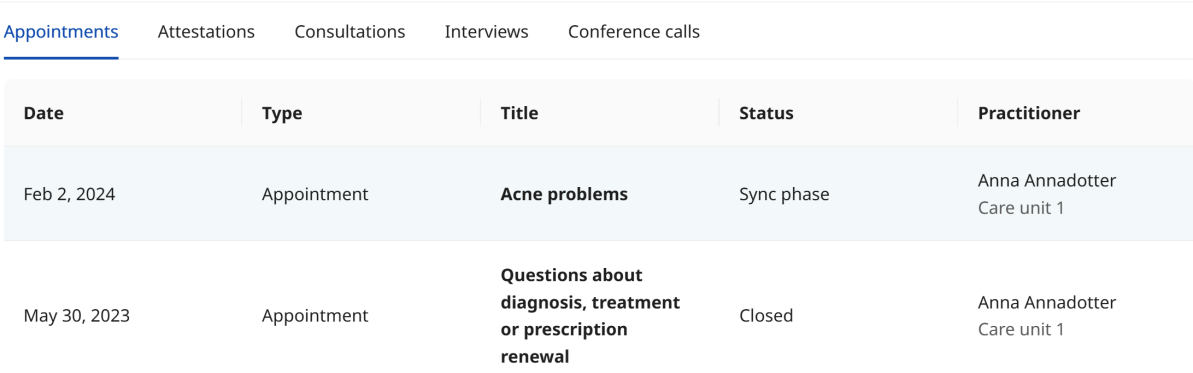
To be able to see the health data graphs (collected via questionnaires), go to the **Health data** tab in the visits page. Here you view how the health data evolves over time.



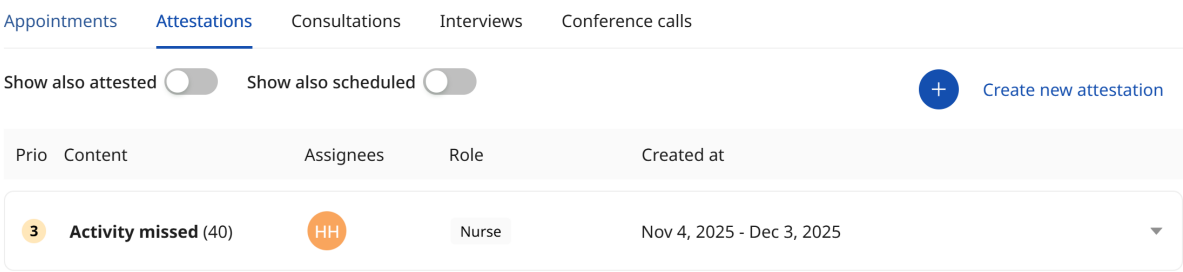
11.8. Patient activity

In the **Patient activity** tab, the patient's activities are listed:

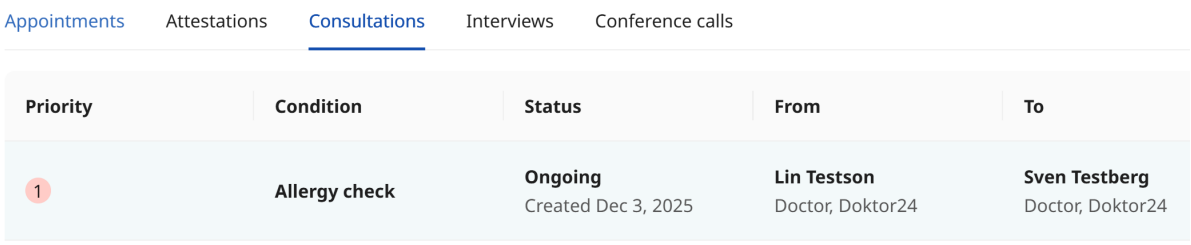
- **Appointments**: All booked and finished appointments (including interviews and consultations)



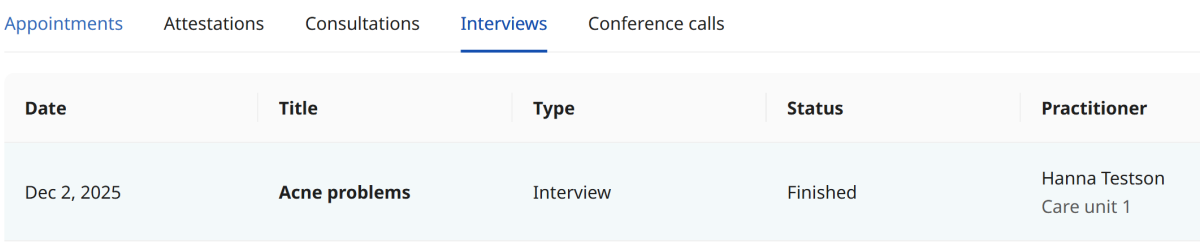
- **Attestations**: All attestations



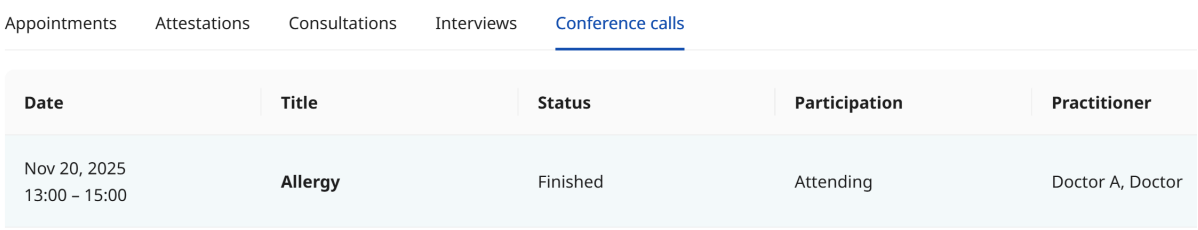
- **Consultations**: All consultations (when consulting a colleague)



- **Interviews**: All interviews



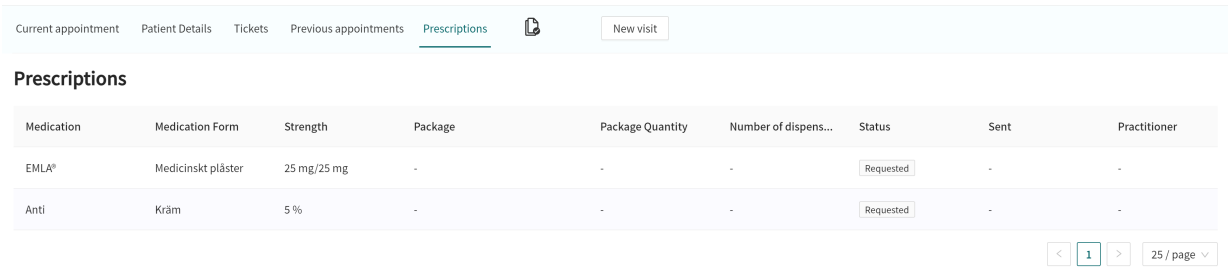
- **Conference calls**: All conference calls



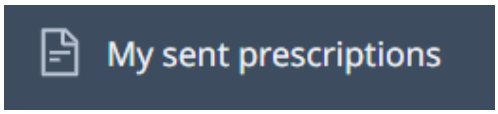
NOTE
If a patient has sought care for their child, these appointments will also appear in this list, marked with the label "Child".

11.9. Prescriptions

In the **Prescriptions** tab, you will find the prescriptions sent for the patient via the platform. Prescriptions sent from other systems are not visible here.



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



11.10. Consent



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

11.11. New visits, consultations and tickets

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

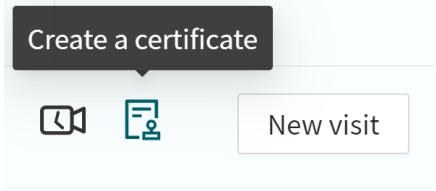


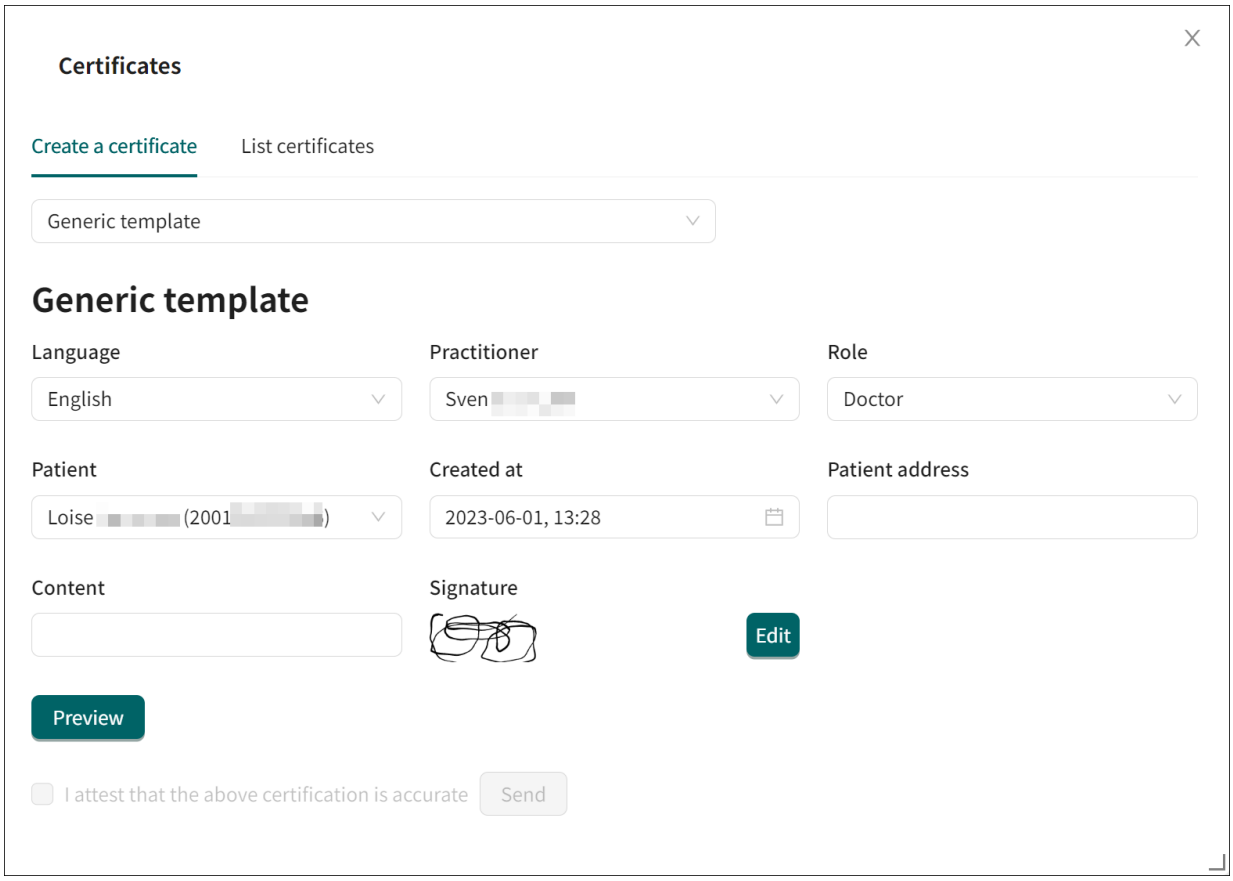
If this is done during an ongoing visit, a future scheduled visit is created. It is still possible to chat with an existing patient while the new visit is being booked.

For more information on booking new visits and the different visit types, see Booking a visit for a patient [140].

11.12. Certificates

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



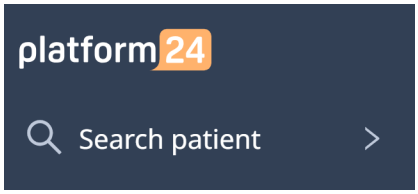

Certificates
Create a certificate
List certificates
Generic template
Generic template
Language
English
Practitioner
Sven
Role
Doctor
Patient
Loise (2001)
Created at
2023-06-01, 13:28
Patient address
Content
Signature
Edit
Preview
I attest that the above certification is accurate
Send

12. Managing visits

12.1. Booking a visit for a patient

12.1.1. Book a visit

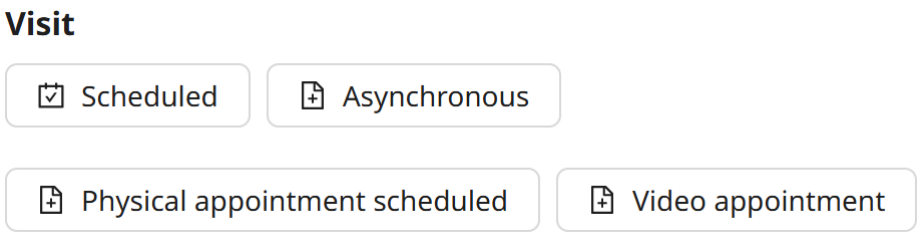
1. Click on **Search patient** in the main menu.



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



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



12.1.2. Visit types

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

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

Table 2. Scheduled visits

Visit type	Features	Description
Scheduled	• Chat ✅ • Video ✅ • Invite practitioners and external guests in advance ❌ • Priority sorting ✅ • Uses time slots ✅ • Uses custom time and date ✅	A digital visit created either through patient-initiated flows or by a practitioner in Clinic. You can either select a previously created time slot or set a custom date and time.

Visit type	Features	Description
Physical scheduled	• Chat ❌ • Video ❌ • Invite practitioners and external guests in advance ❌ • Priority sorting ✅ • Uses time slots ✅	A physical visit created either through patient-initiated flows or by a practitioner in Clinic. Uses a previously created time slot in the **Calendar** workspace.
Video	• Chat ❌ • Video ✅ • Invite practitioners and external guests in advance ✅ • Priority sorting ❌ • Uses time slots ❌	A digital visit always created by a practitioner in Clinic. Includes the possibility to invite practitioners and external guests in advance. Does not include chat.

Table 3. Drop-in visits

Visit type	Features	Description
Physical drop-in	• Chat ❌ • Video ❌ • Priority sorting ✅ • Assisted triage ❌	A physical visit created either through patient-initiated flows or by a practitioner in Clinic.
Digital drop-in	• Chat ✅ • Video ✅ • Priority sorting ✅ • Assisted triage ❌	A digital visit most often created by patient-initiated flows, but can also be created through a drop-in ticket in Clinic.
Telephone	• Chat ❌ • Video ❌ • Priority sorting ❌ • Assisted triage ✅	A digital visit always created by a practitioner in Clinic where the main purpose of the visit is a practitioner assisted triage.

Scheduled visit type

A **Scheduled** visit type is a digital visit that gives the option to either use a time slot that was added in advance from the **Calendar** view in Clinic or to set a custom date and time. When booking a scheduled visit, the time slots can also be filtered on tags if that has been used.

All visits created through the **Scheduled** visit type flow are displayed in the **Calendar** view in Clinic.



NOTE
If a visit was booked using **Custom date and time** make sure to book the same time slot with the same practitioner in your regular external booking system. Otherwise, Clinic and your external system will not be aligned.

For more information about creating time slots and about tags, see Calendar [26]

Asynchronous visit type

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

> **NOTE**
> An asynchronous visit does not mean that you are booking the patient for an online appointment. If an online appointment is intended, use the visit types scheduled, video or telephone instead, depending on the need. For an overview of the different visit types, see Visit types [140].

Physical appointment drop-in visit type

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

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

Physical appointment scheduled visit type

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

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

Telephone visit type

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

Video visit type

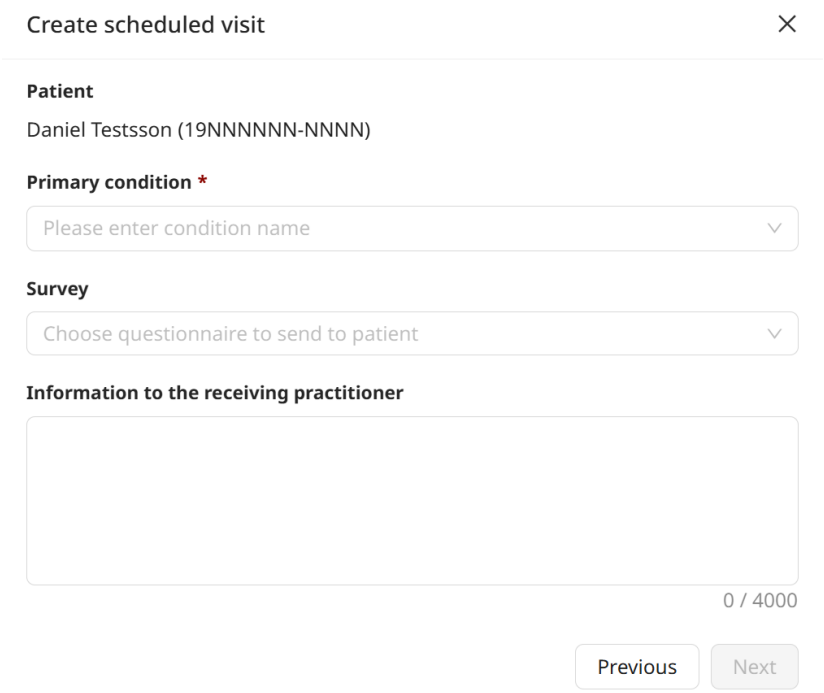
A **Video** visit type is a scheduled video call that does not include chat. The practitioner is able to invite other practitioners and external guests in advance.

12.1.3. Book a scheduled visit

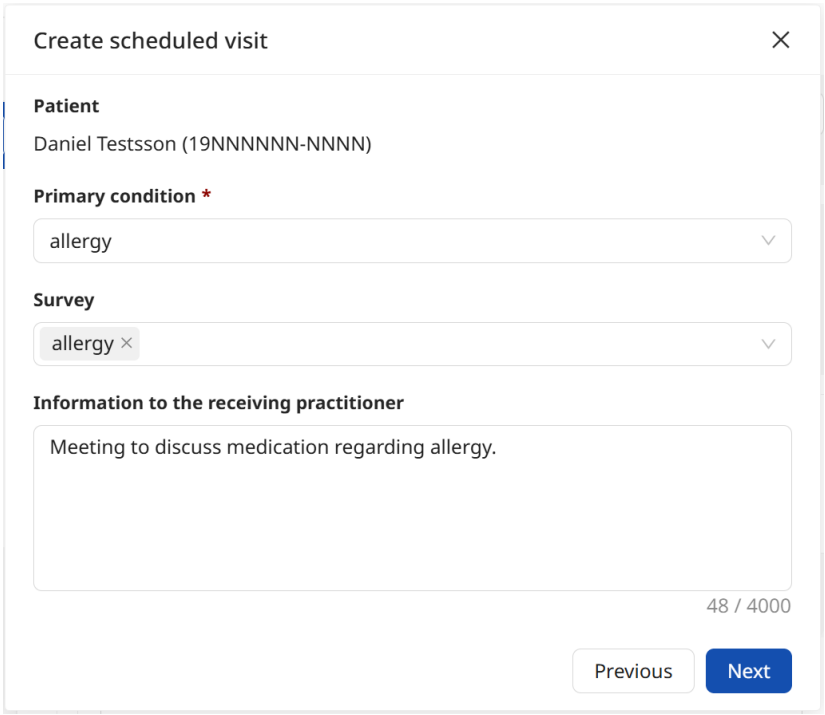
When you book patients for visits using the **Scheduled** time slot type, the reason for the visit must be stated. If you choose *Follow-up appointment*, the patient will not be asked any questions before the visit when logging in to the visit. If you choose to book a visit based on a specific symptom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

A scheduled visit, can be be booked by either selecting a time slot that was added in advance from the **Calendar** view in Clinic or by setting a custom date and time. See below for detailed instructions.

1. Select the primary condition from the **Primary condition** list. The primary condition is used to describe the patient's case and is displayed to the patient in the Patient app.

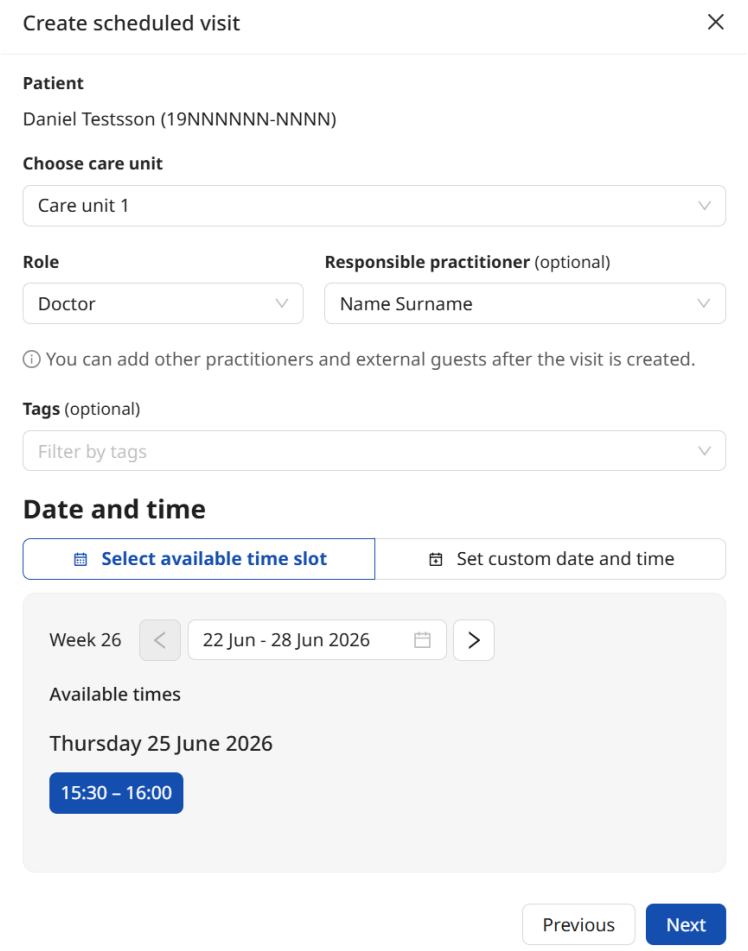


2. To send a questionnaire to the patient, select the questionnaire from the **Survey** drop-down list. If a description has been added in the **Description of questionnaire** field in Content Studio, this description will be shown in the **Survey** drop-down list.
3. Optionally, write a short text in the field **Information to the receiving practitioner**, on what the visit is about. This text will not be shown to the patient.

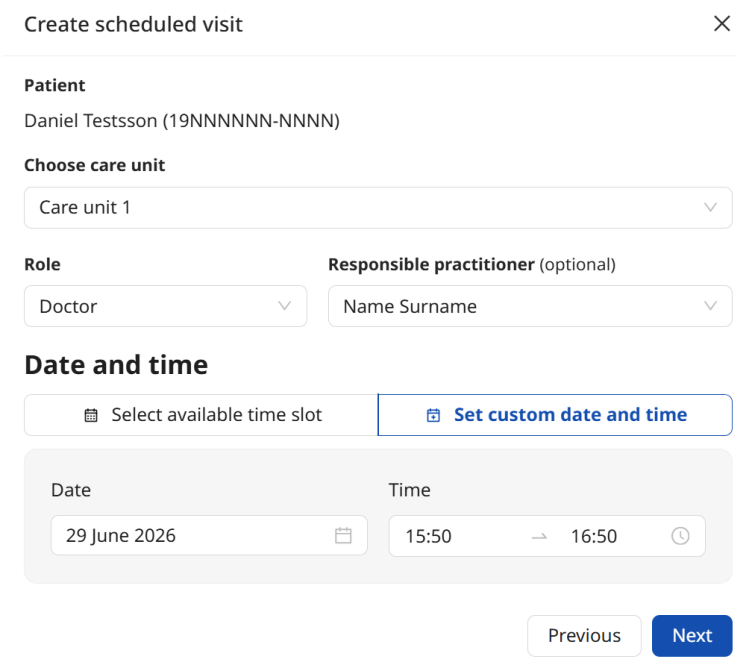


4. Click **Next**.
5. Select care unit and role.

6. Use one of the two following options to select time slot type and book a visit.
   - Click **Select available time slot** to book a time slot that was added in advance from the **Calendar** view in Clinic. The time slots are shown per week.

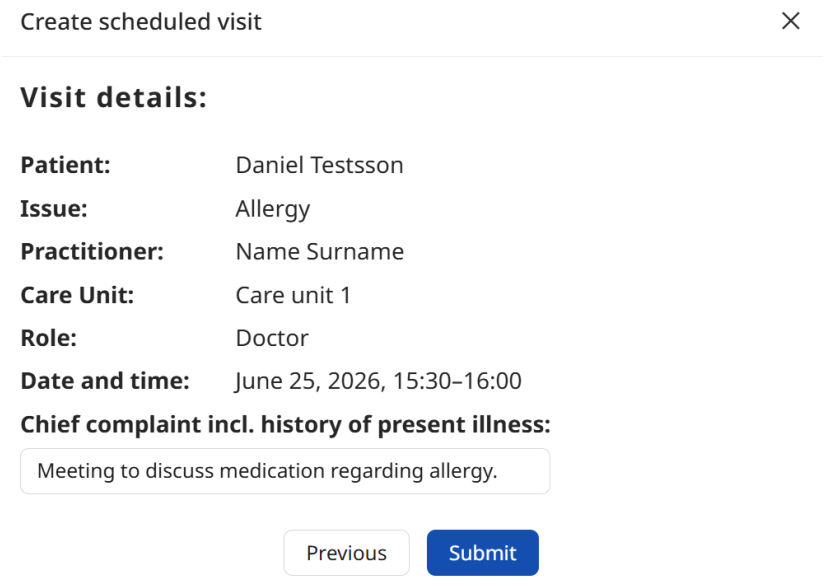


- Click **Set custom date and time** to book a scheduled visit using a custom date and time. Select **Date** and **Time**.



> **NOTE**
> If a visit was booked using **Custom date and time** make sure to book the same time slot with the same practitioner in your regular external booking system. Otherwise, Clinic and your external system will not be aligned.

7. Click **Next**.
8. Click **Submit**.



12.1.4. Book a video visit

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

To book a video visit via the visit view or via the visits page:

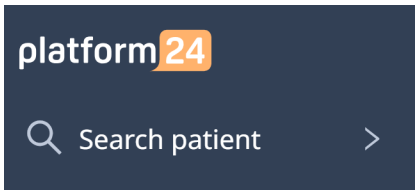
1. Click the **New** button.



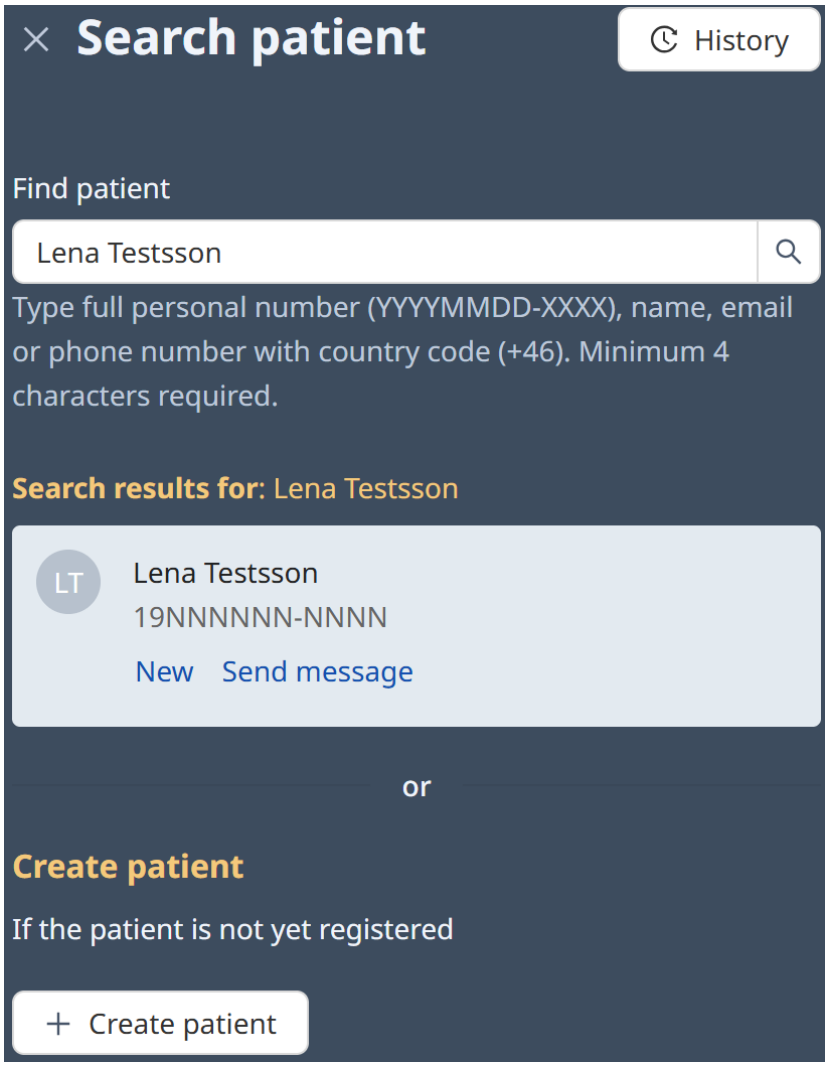
2. Continue with step 4 in the instruction below.

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

1. Click on **Search patient** button in the main menu.



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

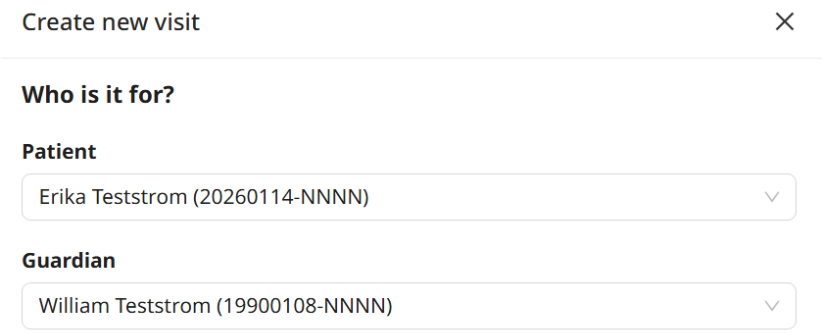


3. Click **New** below the patient's name in the search result. This opens the **Create new visit** dialog.

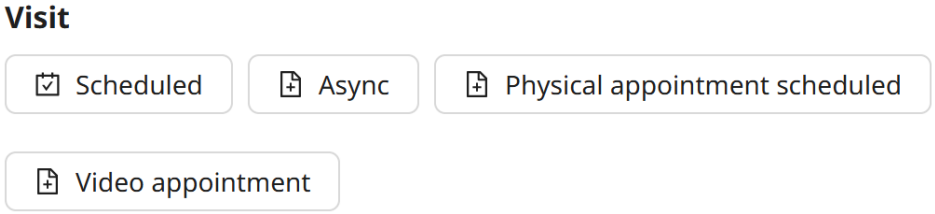
> **NOTE**
> If the patient cannot be found, the patient first needs to be added to Clinic. For information on how to add a patient to Clinic, see Register a new patient [20].

4. If the patient is a child, select the guardian of the child under **Guardian**. This option is only displayed if the patient is a child. If a guardian is added, this person will receive the booking

confirmation and reminders for the scheduled video visit. The video visit will also be visible in the guardian's Patient application.

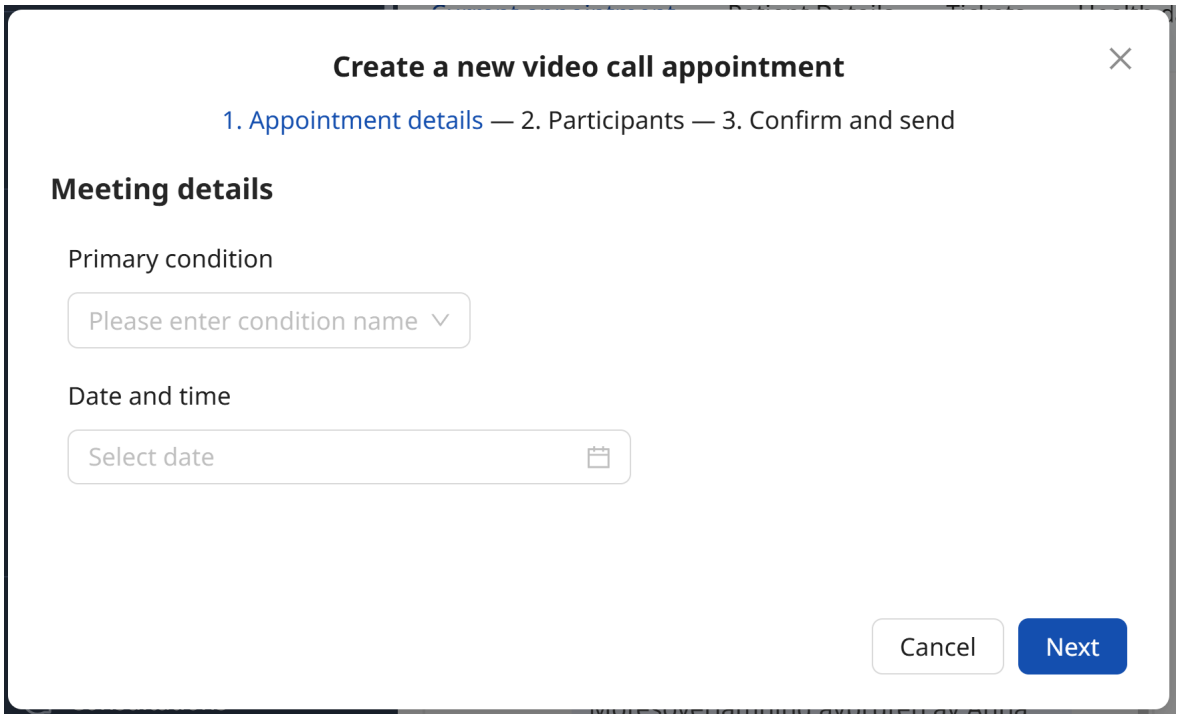


5. Click the **Video appointment** button.



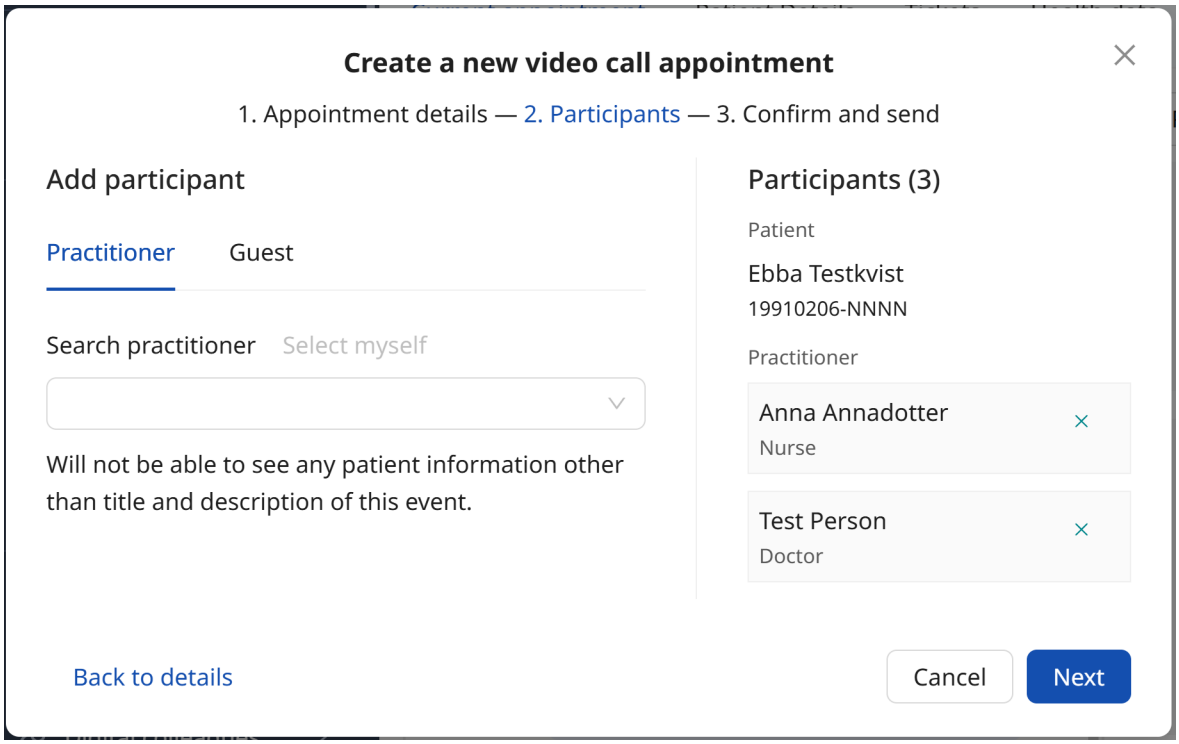
6. Enter the **Primary condition** and select a **Date and time** for the visit.

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



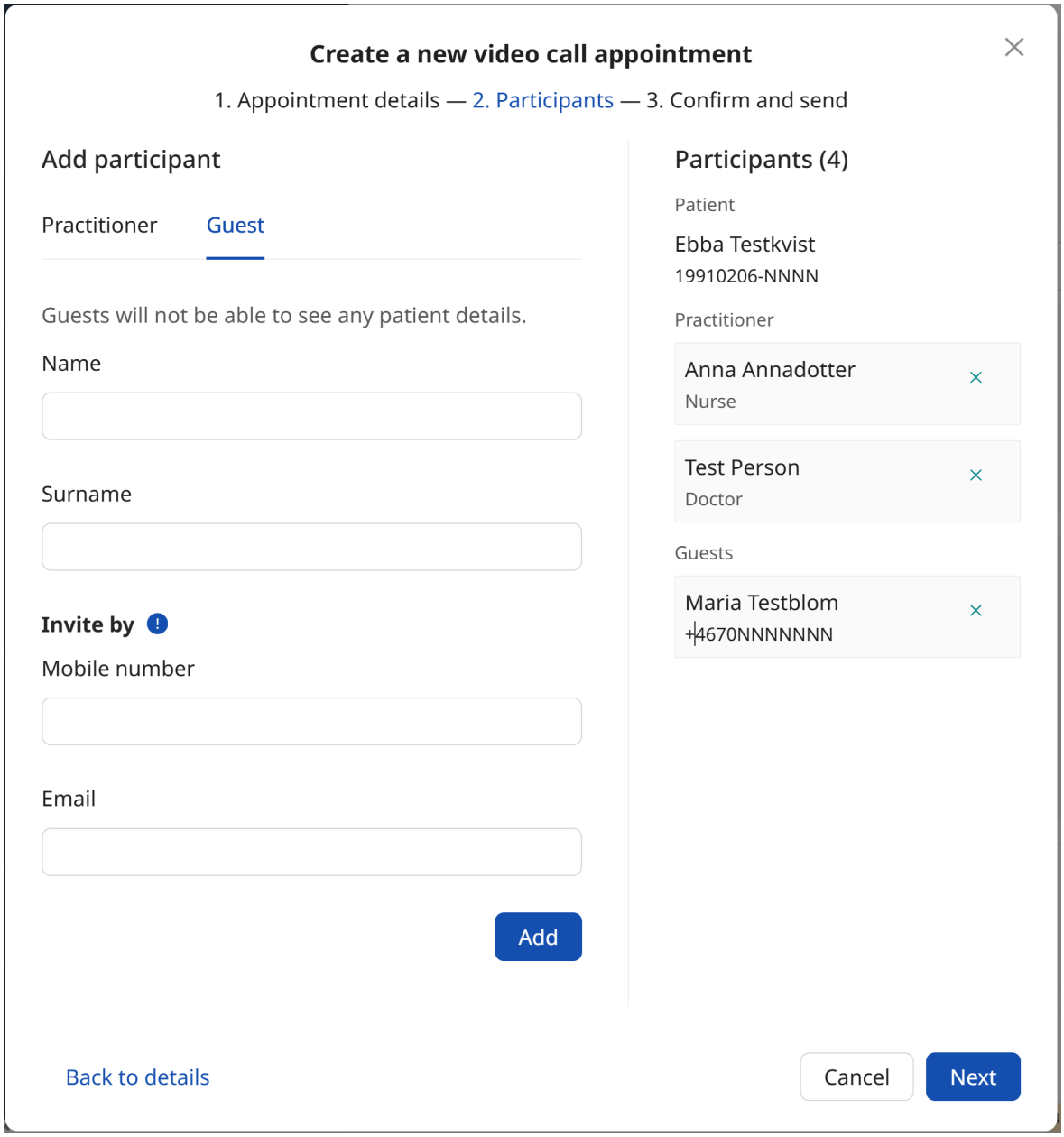
7. Click **Next**.
8. In the **Practitioner** tab, add all practitioners that should take part in the video visit. You can select yourself by clicking the **Select myself** button, and also search for other practitioners to

add in the **Search practitioner** field. The added practitioners are visible in the **Participants** list to the right.



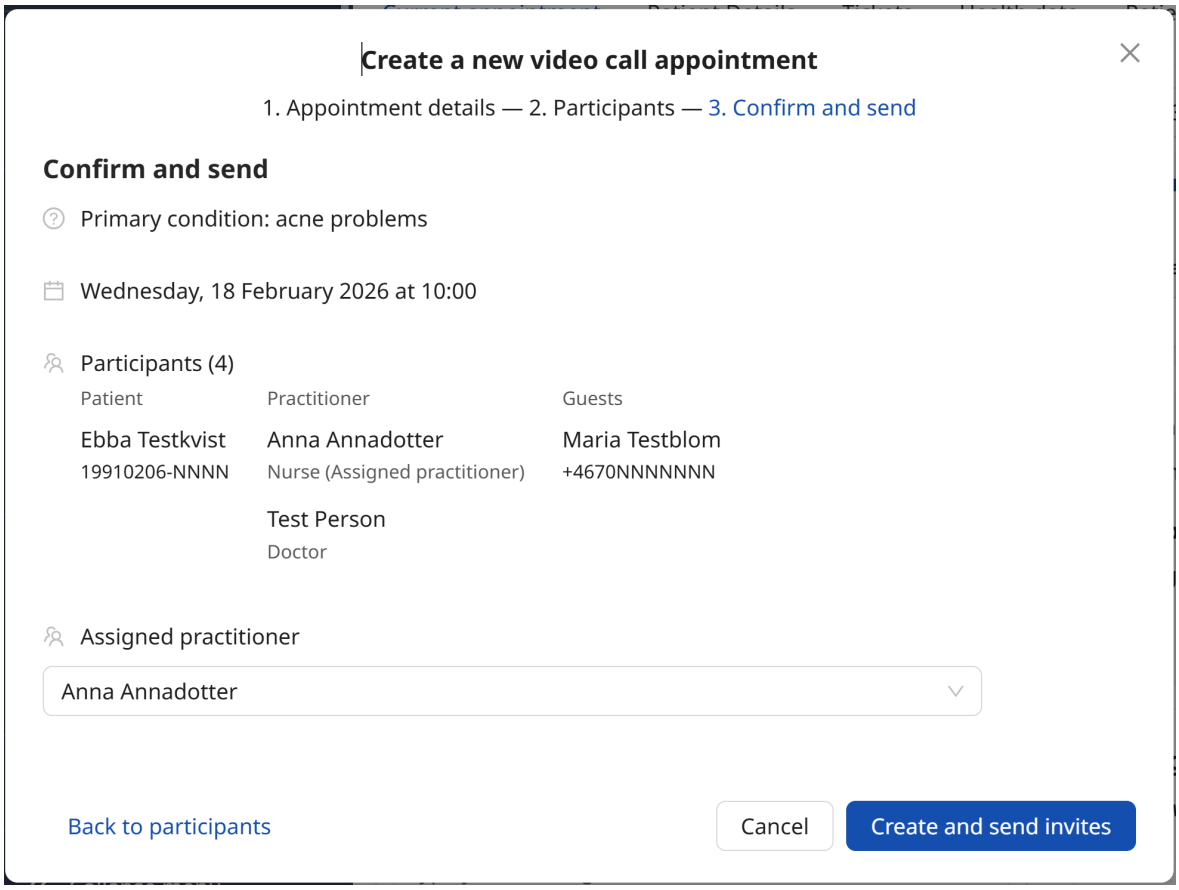
To remove a practitioner from the video visit, click the 'x' next to the name in the **Participants** list.

9. If desired, additional external guests can be added to the visit in the **Guest** tab. The guests can be invited by **Mobile number** and/or **Email** by filling in the corresponding fields. Click **Add** to add the guest. The added guests are visible in the **Participants** list to the right.



To remove a guest from the video visit, click the 'x' next to the name in the **Participants** list.

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



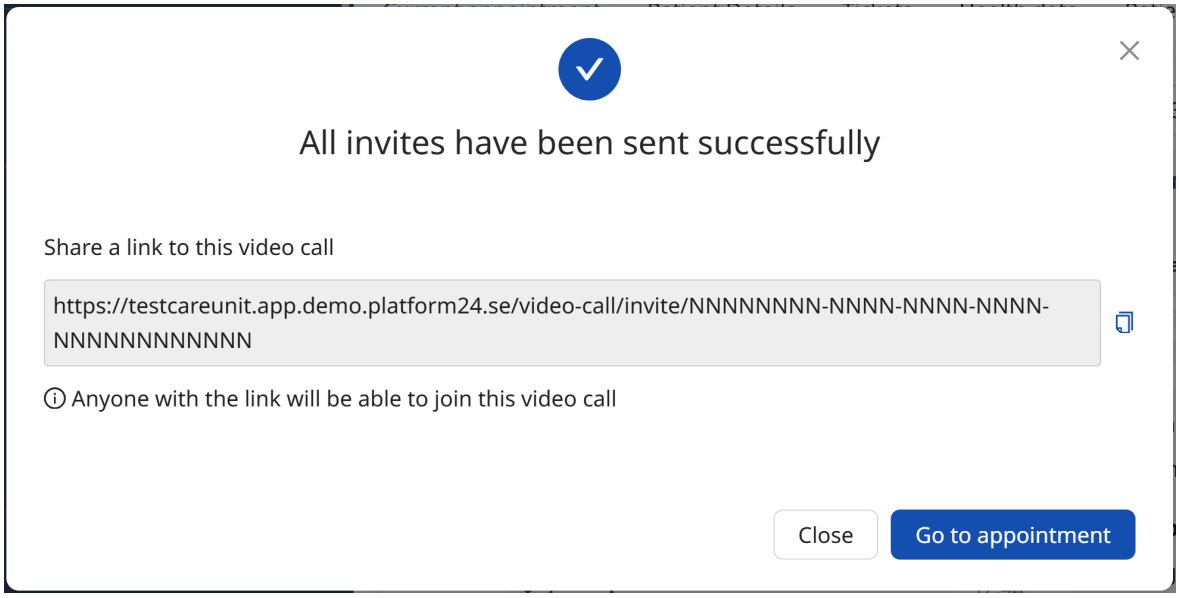
NOTE

It does not have to be the assigned practitioner that starts and conducts the meeting. All added practitioners can start the video visit together with the patient and the other participants.

If the video visit is started by another practitioner than the assigned practitioner, this practitioner will now be the assigned practitioner for the visit. The video visit will also be automatically moved to the care unit where this practitioner is logged in in Clinic. These changes will be visible both in Clinic and in the Patient app.

11. Review and verify that all details are correct.
12. Click **Create and send invites** to complete the booking, or **Cancel** to cancel the booking.

13. When a booking has been completed, a confirmation will be displayed. All invited guests will receive a unique link via SMS and/or email. A general link to the visit is also created, and can be used by for example an interpreter. Click the **Copy link** button to copy the link to the meeting.



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

12.1.5. Book an offline visit (physical visit)

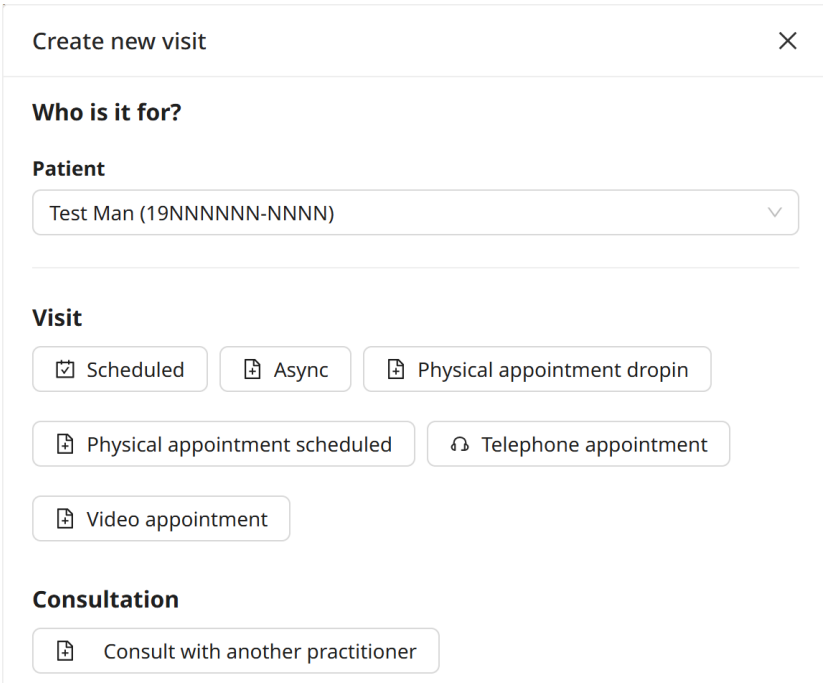
Healthcare practitioners in physical care units can set up visits for patients who do not have access to the Patient app or to their unique personal identifier when they visit the physical care unit.

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

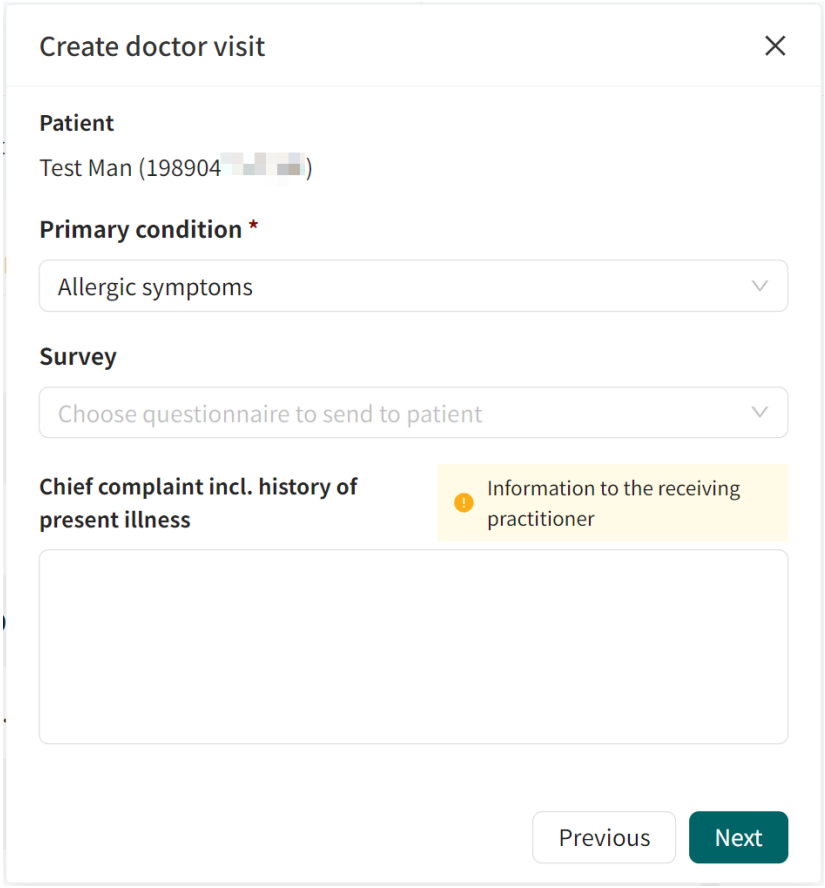
1. Find the patient or register a new patient if they are not in the system.
2. In the visits page, click **New**.



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

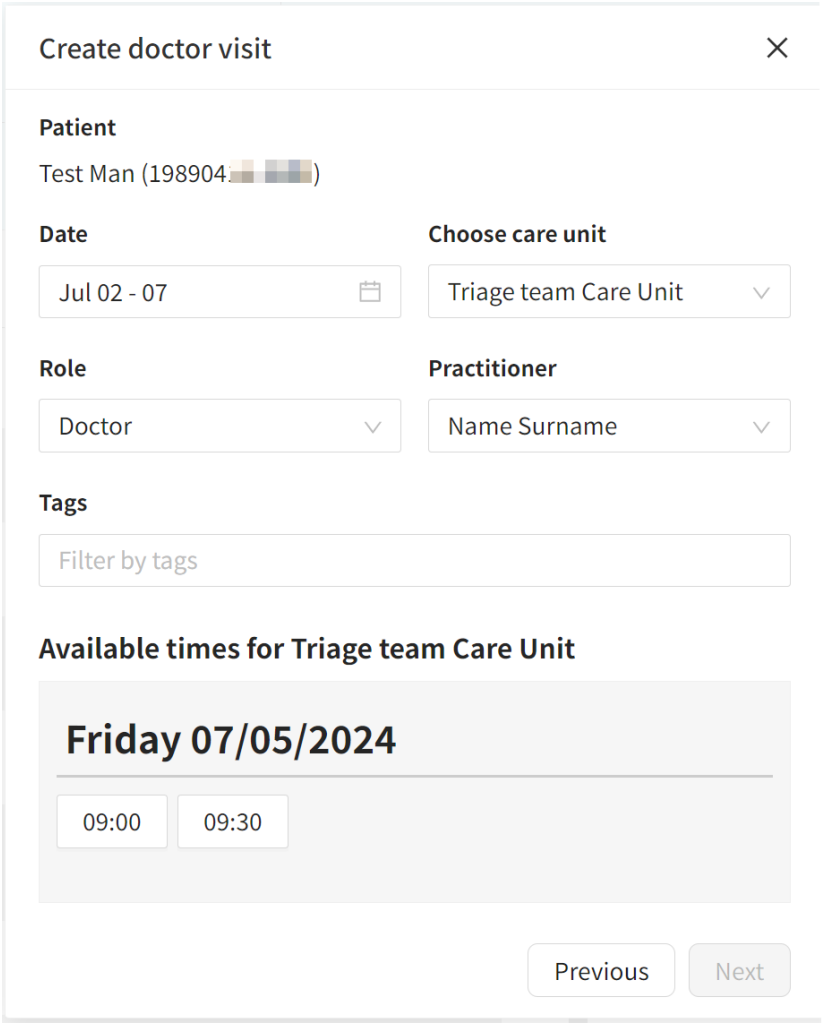


4. Specify the reason for seeking care and medical history.

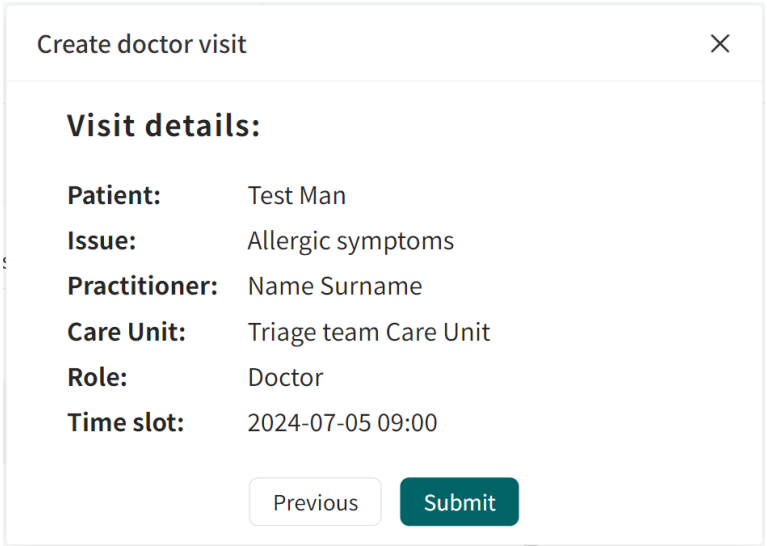


5. Click **Next**.

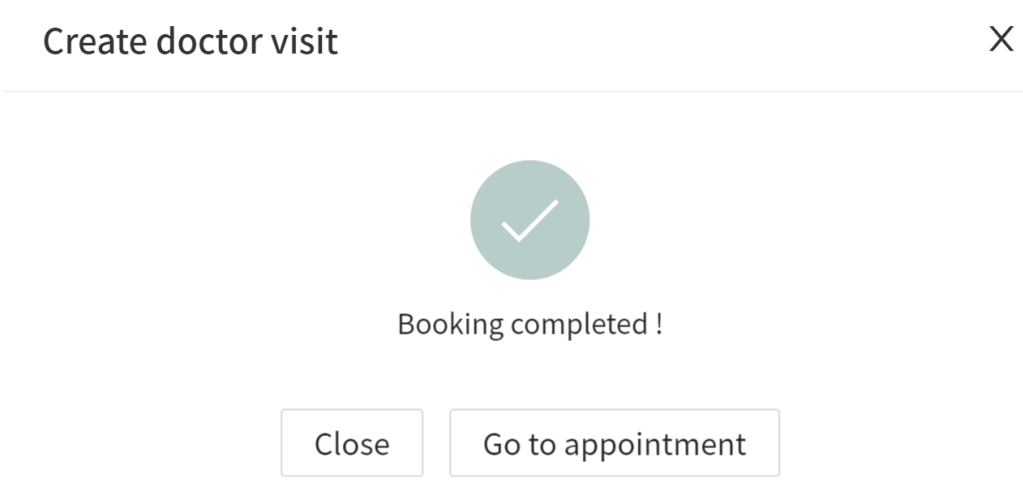
6. Change care unit (**Select care unit**) and role (**Role**) if necessary and select a free time slot.



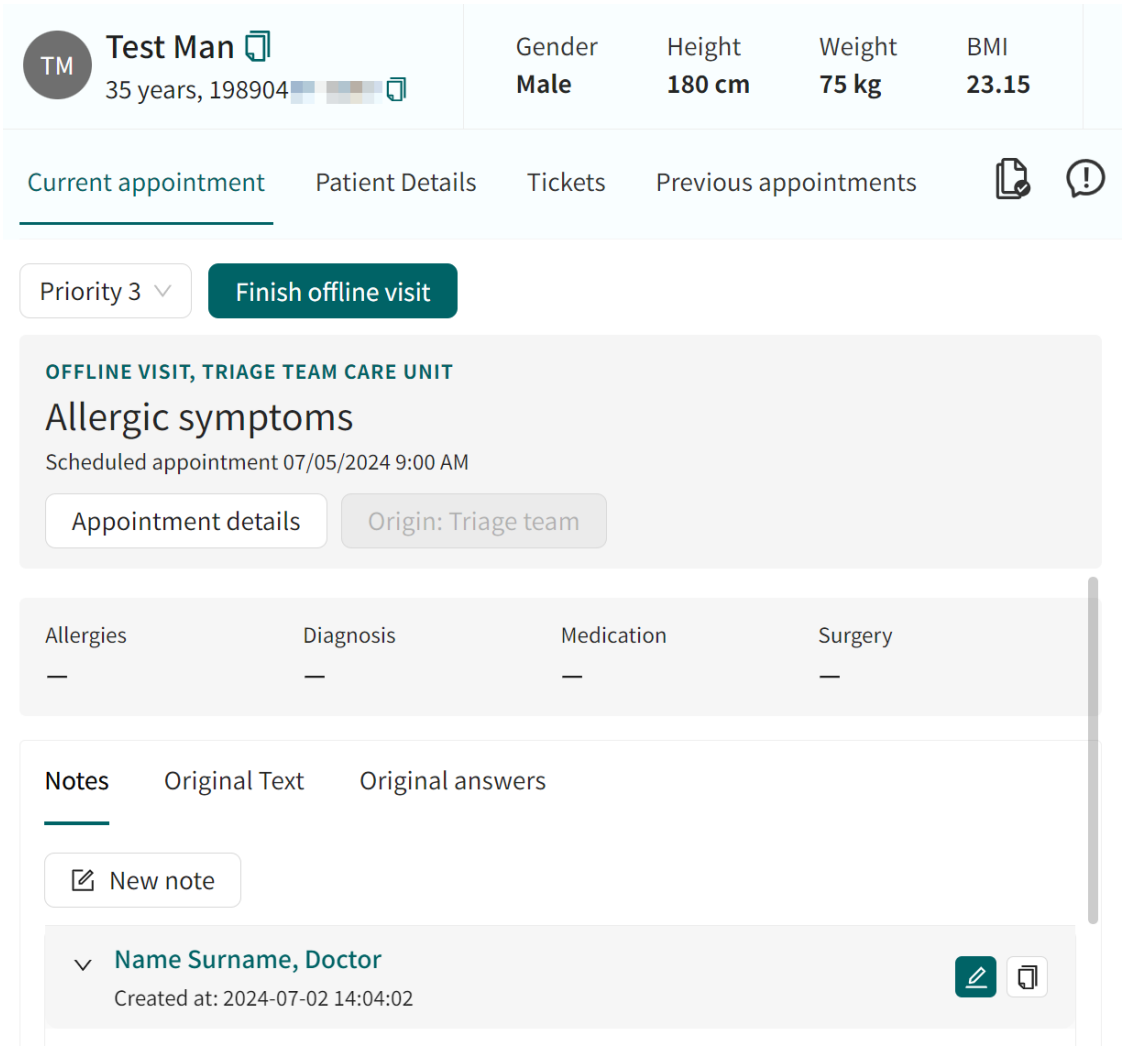
7. Click **Next**.
8. Verify the information in **Visit details**, if it is correct click **Submit**.



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



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



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

12.2. Rebooking a patient

12.2.1. Change time or cancel visit

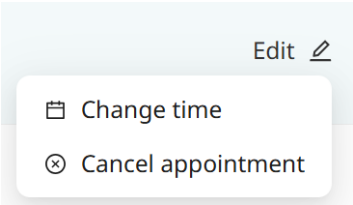
A scheduled visit can be cancelled or reschedule from the **Calendar** view, the **Scheduled visits** view or the **Visit** view.

If the visit was booked using a time slot that was added in advance from the Calendar view in Clinic the cancelled time slot will be available for booking again. If the visit was booked with a custom date and time, the time slot will disappear from Clinic.

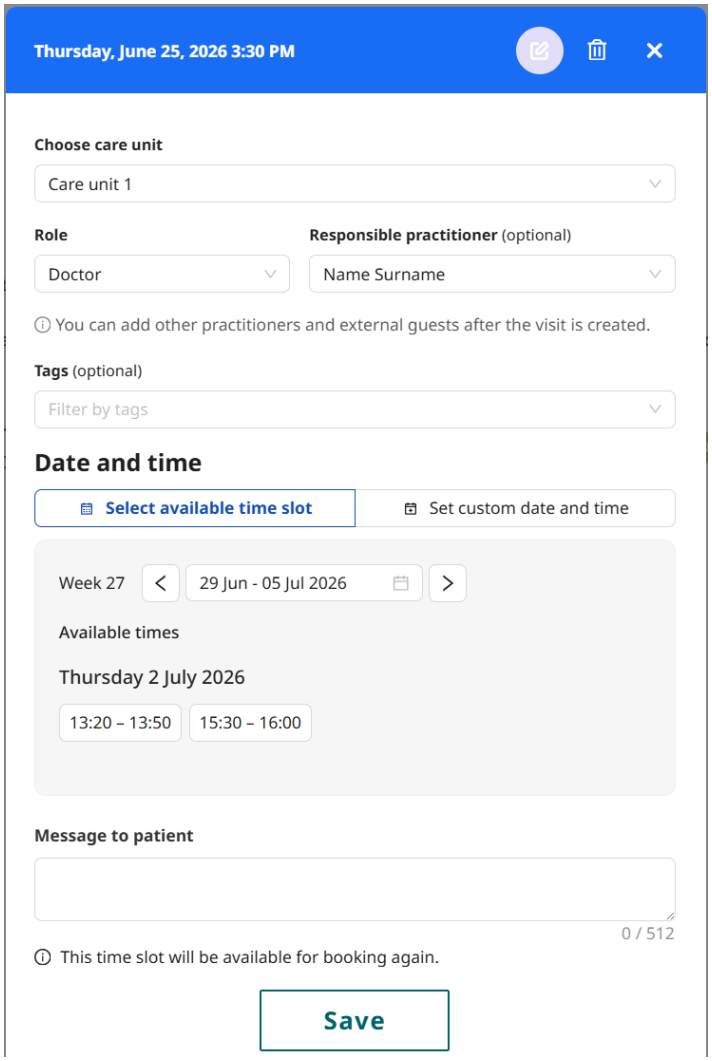
NOTE
If you modify a visit booked with **Custom date and time**, make sure to also cancel or reschedule the visit in your external booking system.

To change the time for a visit, do the following:

1. Click **Edit**, and select **Change time**.



2. Select a new time slot, either from an available time slot or by setting a custom date and time. You can also reschedule the visit to another care unit, role or practitioner.



3. Enter a message in **Message to patient** to notify the patient (optional).
4. Click **Save**.

To cancel a visit, do the following:

1. Click **Edit**, and select **Cancel appointment**.
2. Enter a message in **Message to patient** to notify the patient (optional).
3. Click **Confirm**.

12.2.2. Visits booked by healthcare practitioners

In order to clearly distinguish between visits booked by healthcare practitioners and visits booked by patients themselves, this will be clearly visible in the **Medical record notes**, see also Appointments booked by practitioners [119].

The text written by the healthcare practitioner at the time of booking will be presented under the medical record notes in a separate “information box”.

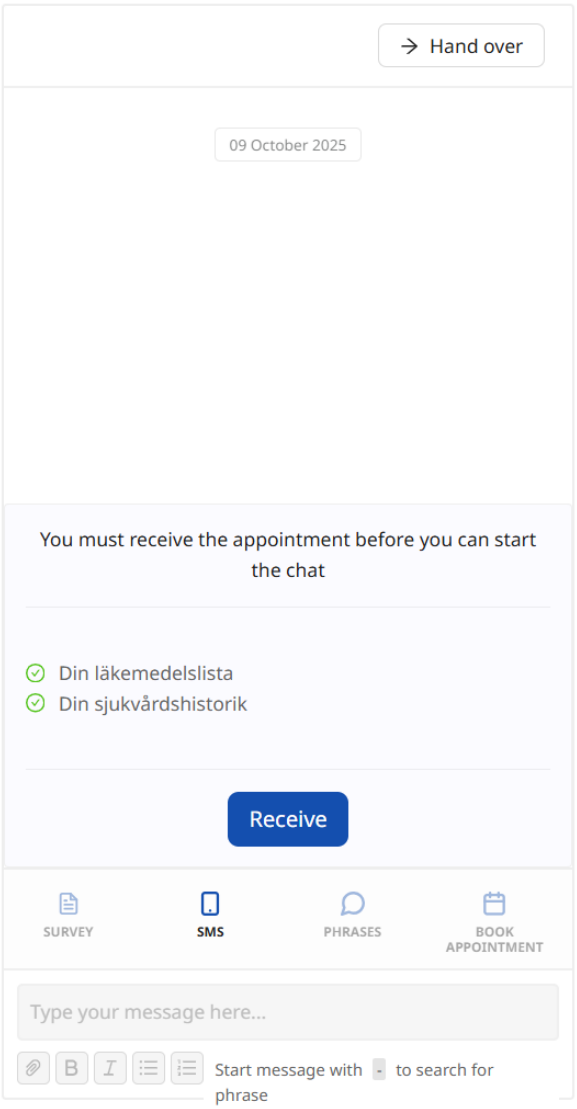
12.3. Start visits

12.3.1. Start a drop-in visit



TIP
If you want to hand over the visit to a colleague before it starts, follow the instructions in Transferring visit before receiving [175].

1. Click on a row in the **Waiting in line** list to open the visits page. Then click the **Receive** button in the in the chat to receive the patient.



NOTE

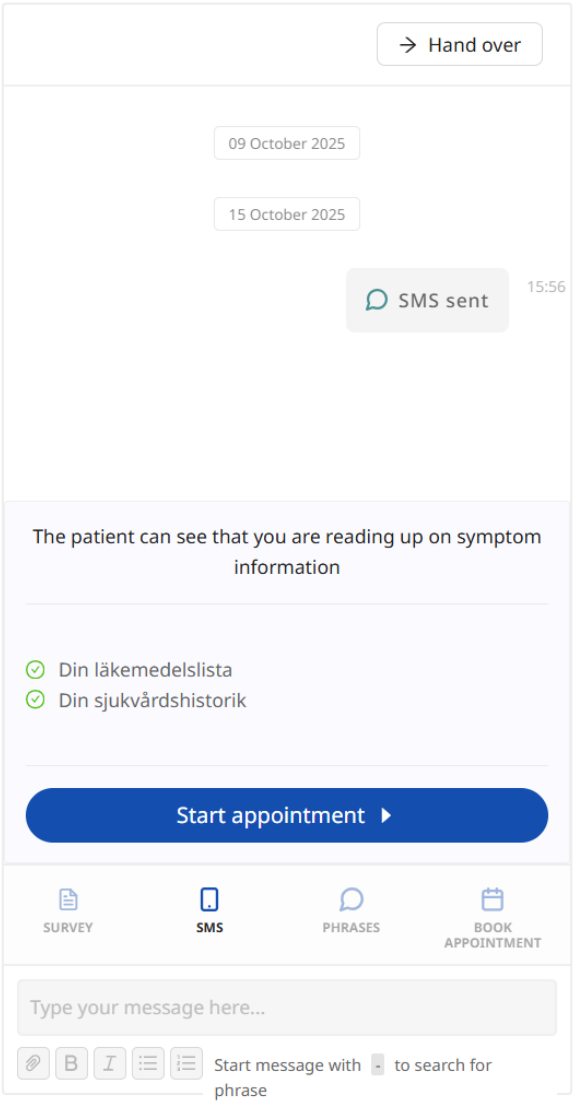
When you receive the visit, you are assigned as the responsible practitioner, and the visit is automatically moved from the "Waiting in line" tab to the "Ongoing" tab on the Drop-in visits page. You can then start reviewing the case before the visit is started and before the chat/video is enabled.

When you receive the visit, an automatic SMS is also sent to the patient, informing them that the visit will start shortly. If the patient is a child, the SMS is sent to the guardian who initiated the visit on behalf of the child.

TIP

If multiple practitioners monitor the drop-in list at the same time, it is recommended that you first receive the visit before you start reviewing the case. When you receive the visit, you are assigned as the responsible practitioner, and the visit is automatically moved from the "Waiting in line" tab to the "Ongoing" tab on the Drop-in visits page. This makes it clear to your colleagues that the visit is now being handled by you, which reduces the risk that they also open the visit and start reviewing the case.

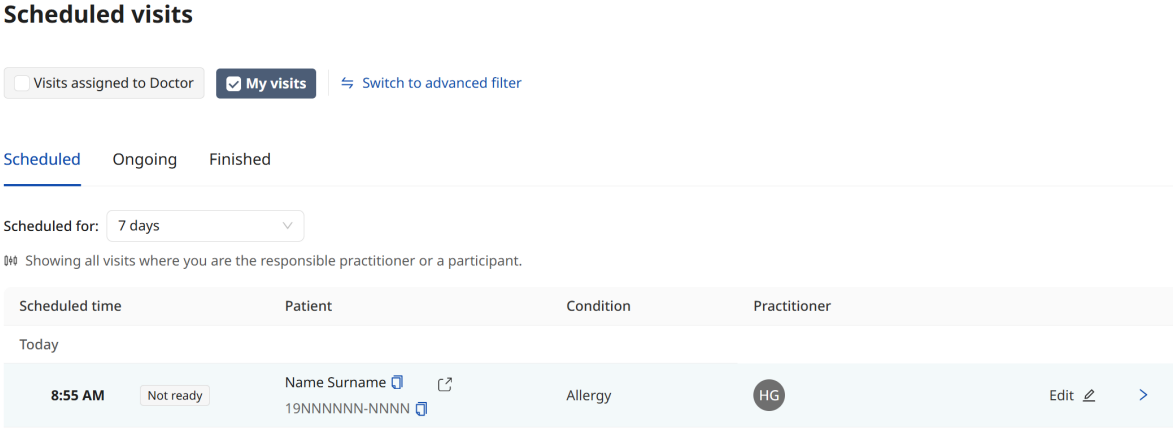
2. When you are ready to enable the chat/video with the patient, click the **Start appointment** button. This will send out an automatic welcome message to the patient in the chat.



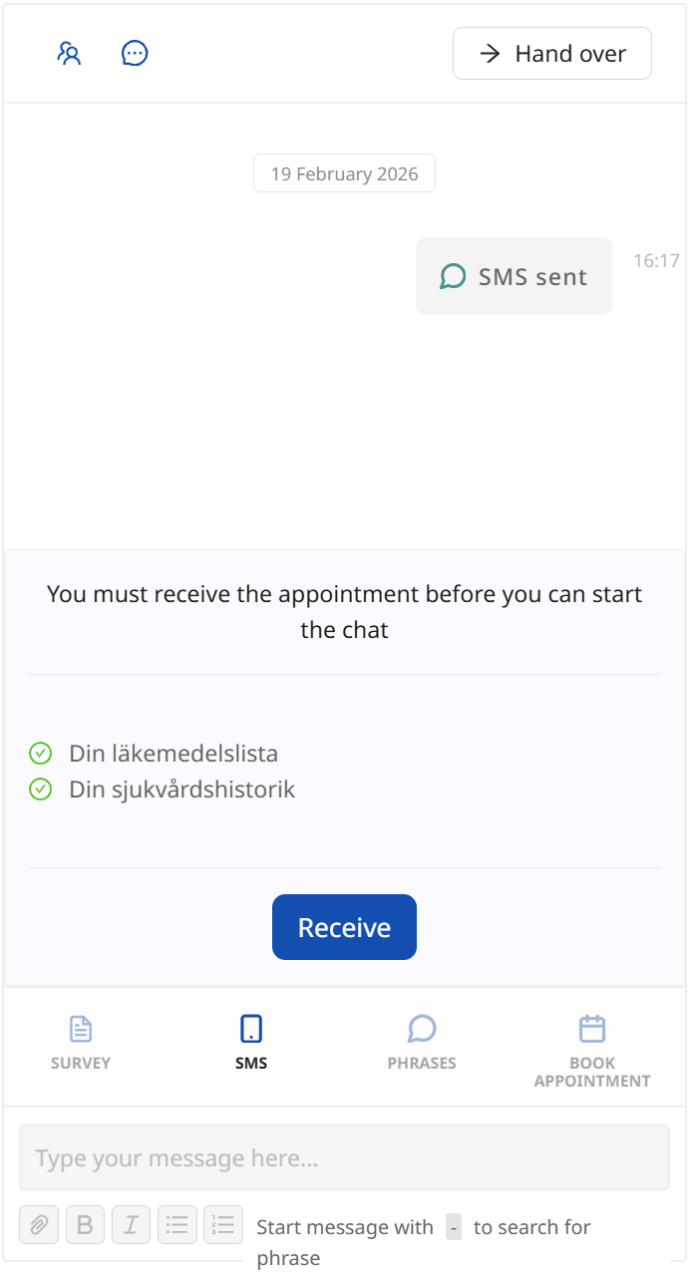
12.3.2. Start a scheduled visit

To start a scheduled visit of the **Scheduled** time slot type:

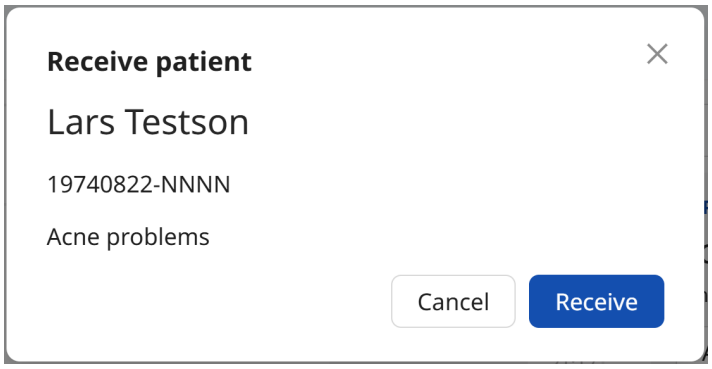
1. Click **Scheduled visits** in the main menu.
2. If desired, make a selection of a care unit, role, practitioner or yourself in the global resource filter (Global resource filter [20])
3. Go to the **Scheduled** tab and click on the visit you want to start.



4. Click the **Receive** button in the in the chat.

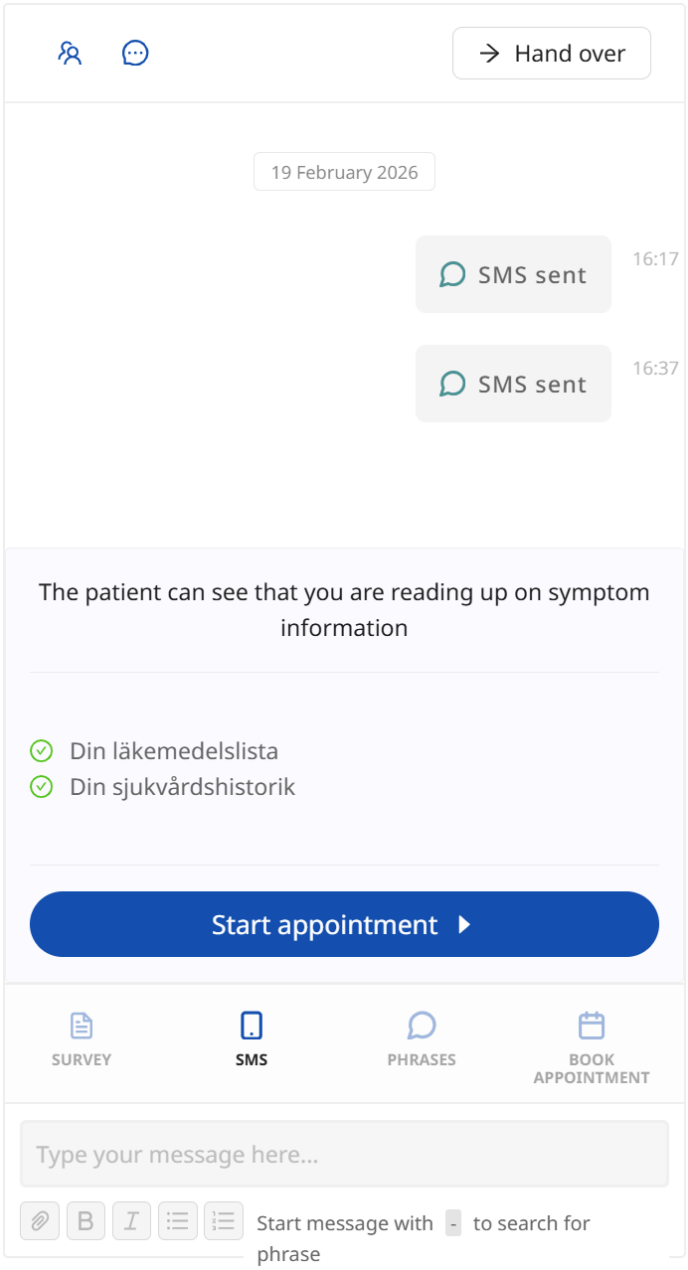


5. Confirm by clicking **Receive**.



6. Prepare for the scheduled visit by reading up on the patient and the case.

7. When you are ready to start the visit, click the **Start appointment** button.



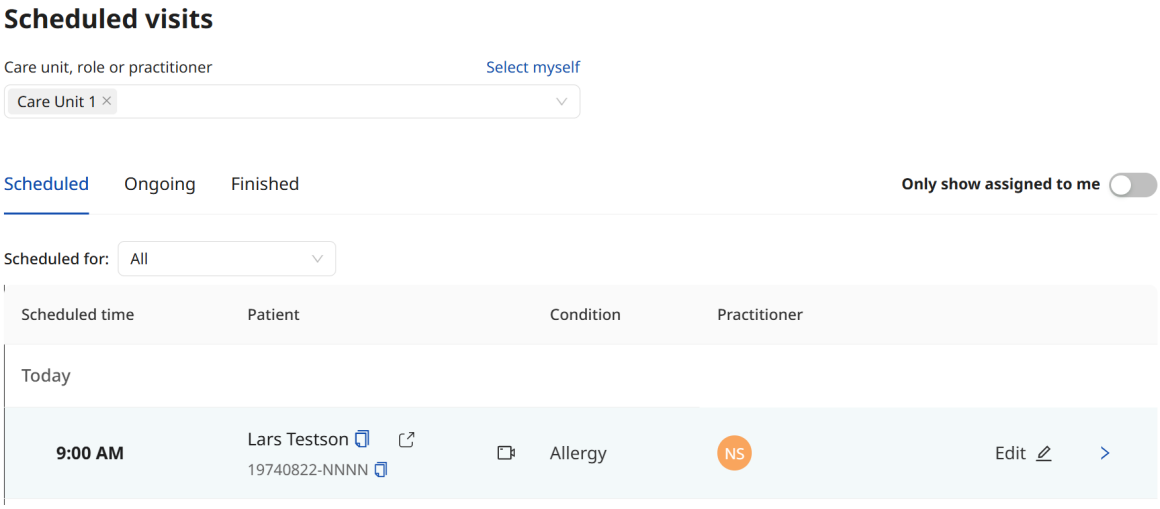
12.3.3. Start a video visit

NOTE
A video visit is a separate visit type that does not include chat. For information about the various visit types, see Visit types [140].

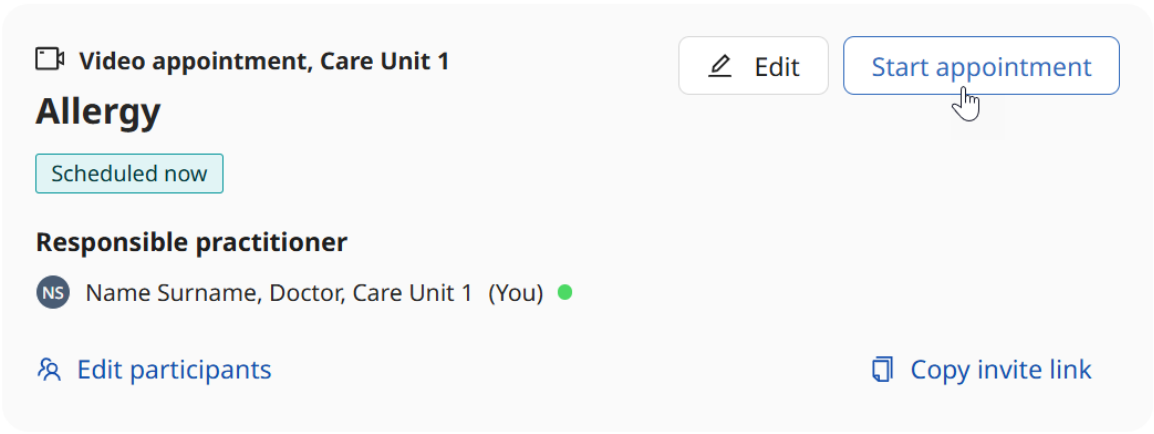
For other visit types such as scheduled and drop-in, it is possible to start a video call in the chat. For more information, see Initiating a video call with the patient in the chat [164].

1. Click **Scheduled visits** in the main menu.

2. If desired, make a selection of a care unit, role, practitioner or yourself in the global resource filter (Global resource filter [20])
3. Go to the **Scheduled** tab and click on the video visit you want to start.



4. Click the **Start appointment** button in the visit view.



5. Confirm by clicking **Receive**.



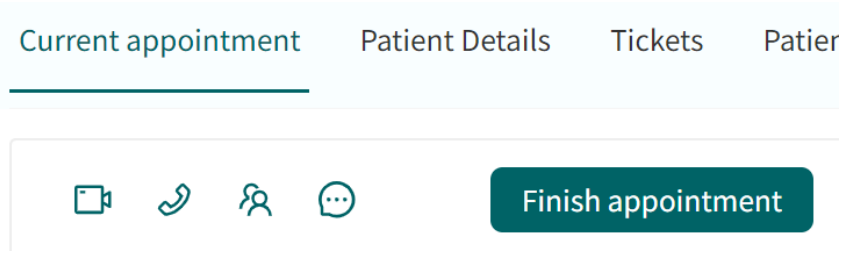
An automated SMS containing information that the video visit is about to start is now sent to the patient or, if the visit concerns a child, to the patient's guardian.

12.4. Features that can be used in online visits

NOTE
The features described in this chapter cannot be used for all visit types. For a description of the various visit types, see Visit types [140].

12.4.1. Initiating a video call with the patient in the chat

- A video call is started by clicking the video icon ( ) in the chat.



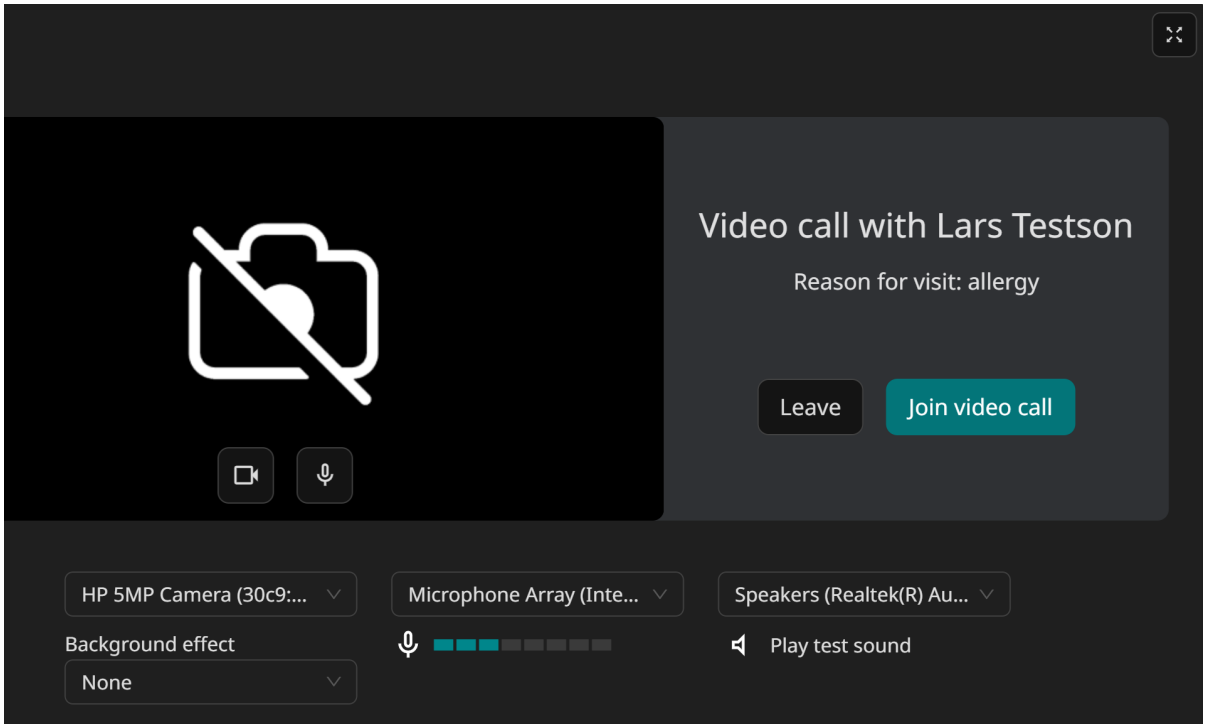
- If you schedule a video call (by selecting **Video appointment** as visit type), it does not include a general visit chat. However, the chat in the video call is always available. An advantage with video calls is that other practitioners and external guests can be invited in advance. For information on how to book a video visit, see Book a video visit [146].

  To start a video call from within a scheduled video visit, you first start the visit, receive the patient and click on the **Join the video call** button in the chat.



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

- The camera, microphone and speakers can be set and tested before entering the video call.
  In the **Background effect** field, practitioners can replace their background with a preselected image or blur the background. For customer-specific background images, please contact Support.



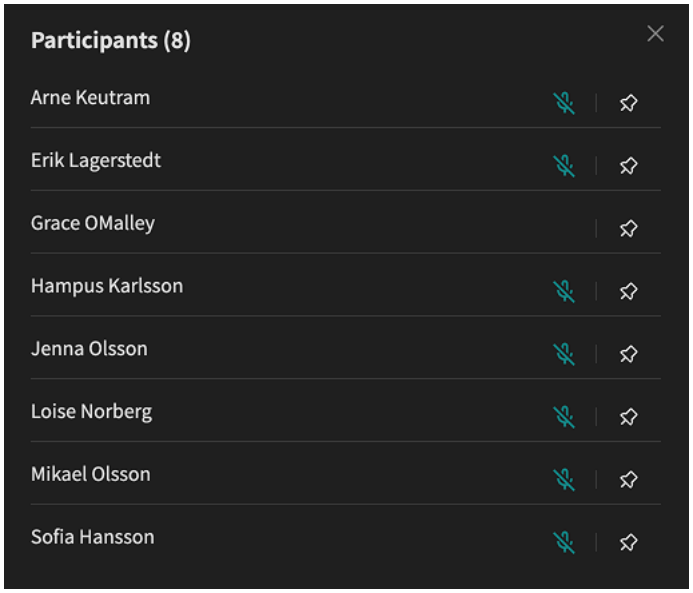
- During video calls, the video window can be moved with the mouse pointer by left-clicking over the video window and by moving it to the desired position.
- In the upper right corner of the video window, there is a button to extend the video window to full screen mode.



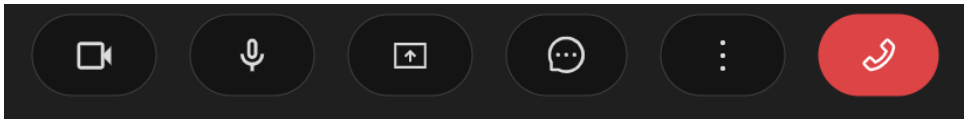
To restore the video window to standard mode, click the restore button in the upper left corner.



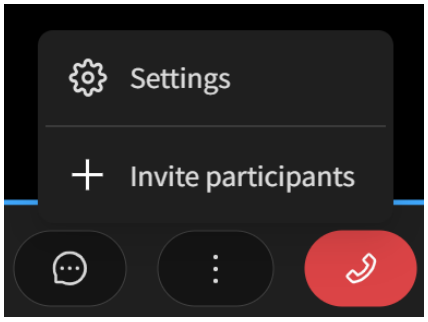
- As a practitioner, it is possible to pin multiple participants on the screen in the video call. For the best experience, it is recommended to pin no more than one or two participants, especially when using a smartphone. You can pin participants directly from the list view by clicking the pin icon.

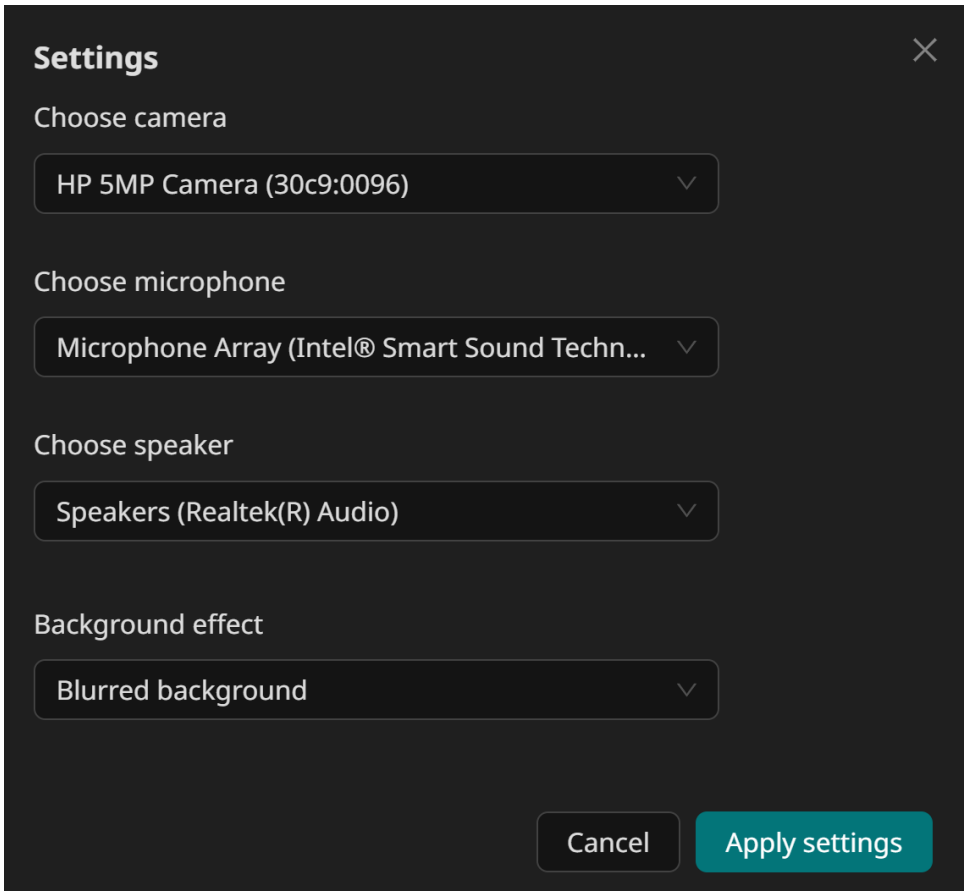


- In the lower part of the video window, there are buttons to disable the video feed, mute the sound, share your screen, open the video call chat, show more options (three dots button) and end the call.

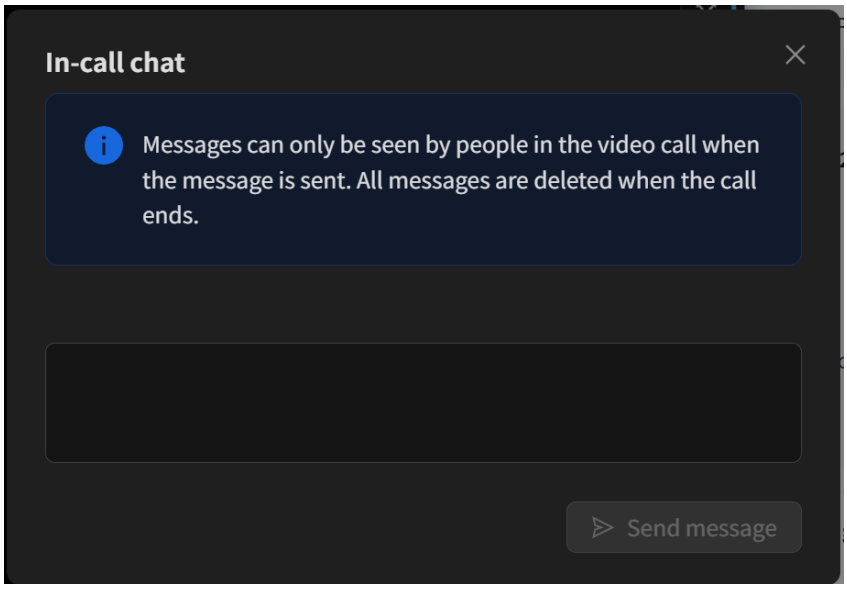


- Via the three dots button, you can invite more participants or open the **Settings** dialog where you can edit the audio and video settings.

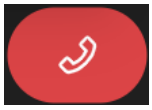




- In the video call chat you can write messages to the participants in the video call.



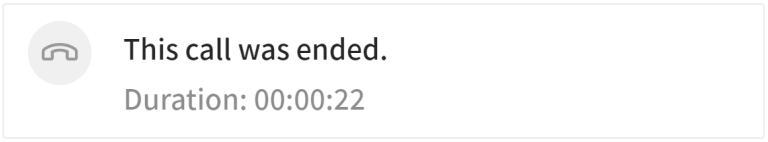
- Click the red phone icon to end the video call.



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

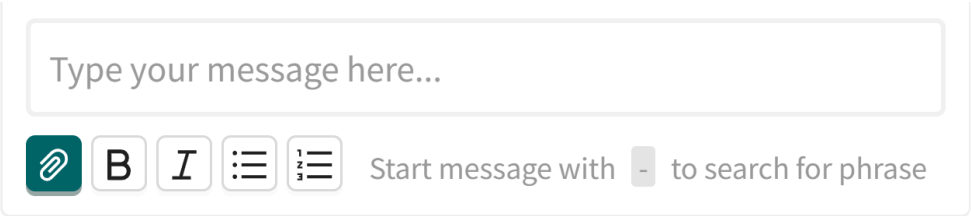


- Ongoing and completed video calls are displayed as a message in the chat, which also shows the duration of the video call.



12.4.2. Sending images or PDF files to patients

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



NOTE
Some receiving units do not support these file uploads.

12.4.3. Receiving images or PDF files from patients

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

For more information, see Uploads [119].

12.4.4. Three-way video calls

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

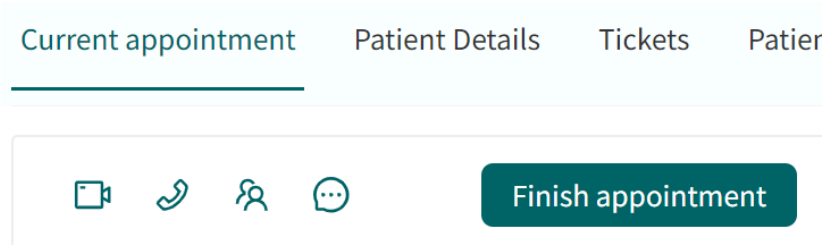
NOTE
The three-way call feature is enabled for certain care units. If this feature is not enabled, contact the account manager at Platform24.

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

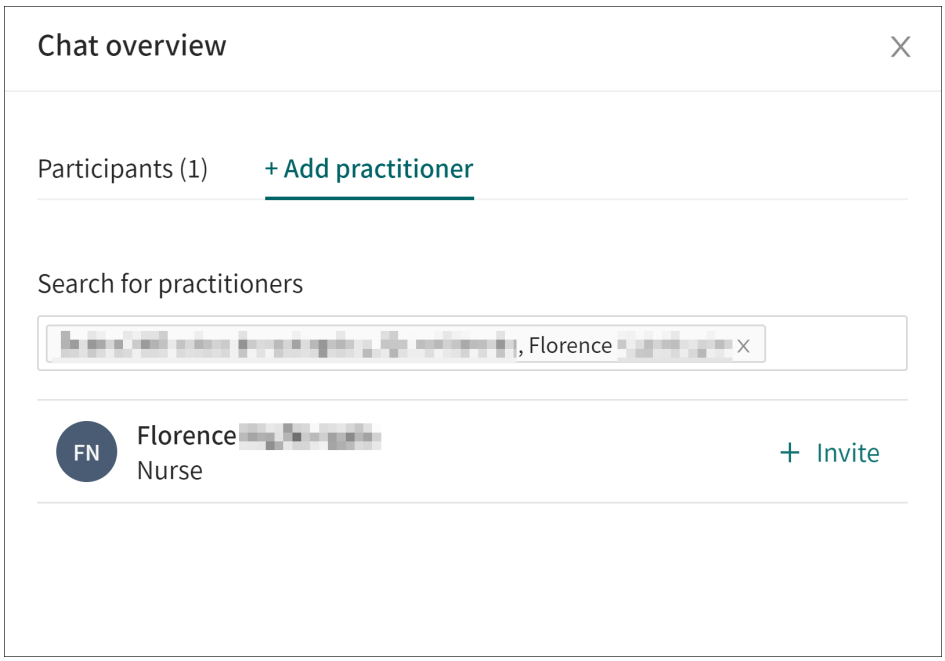
12.4.5. Inviting colleagues to patient or practitioner chat

Inviting colleagues to the patient chat

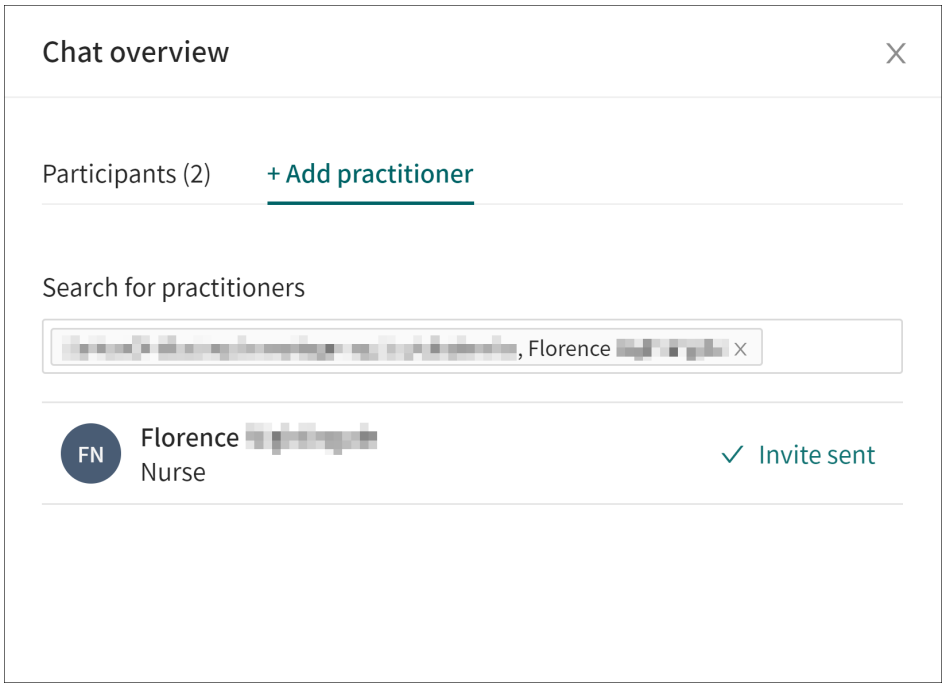
1. Click on the “twin icon” ( ) in the upper part of the chat.



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



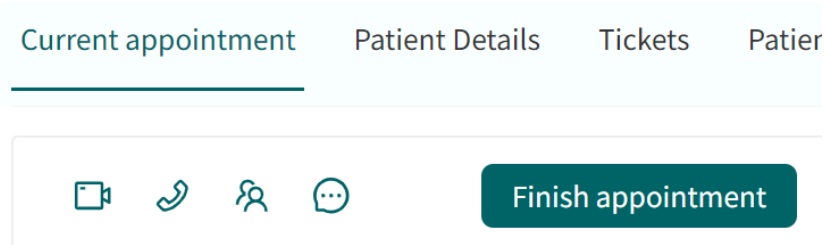
3. You have now invited your colleague to the patient chat.



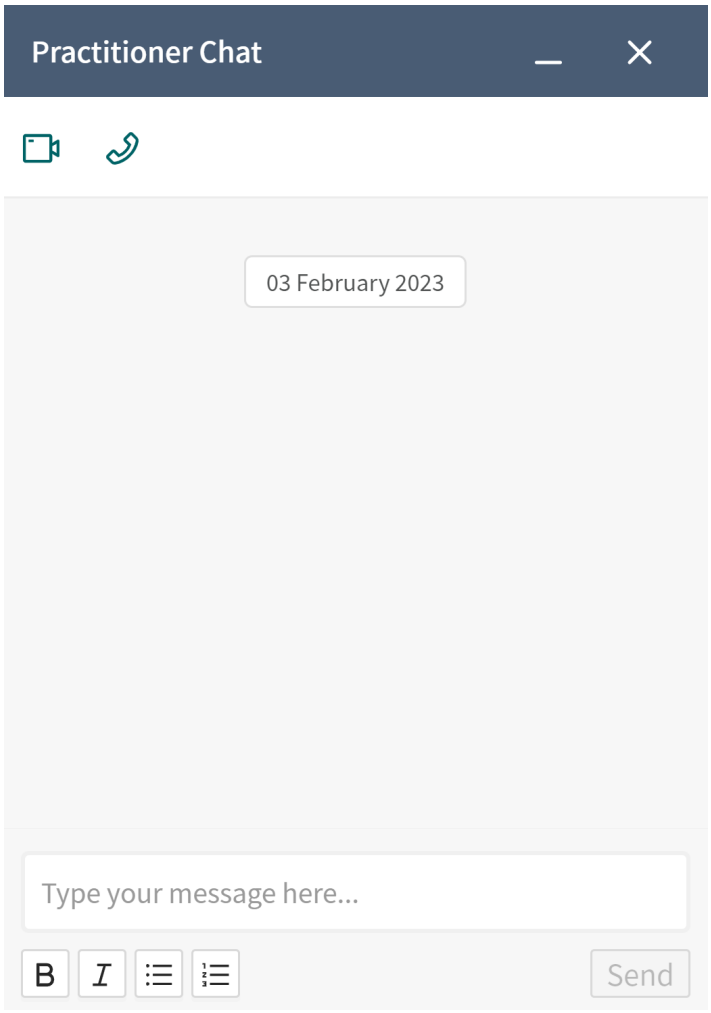
Inviting colleagues to the practitioner chat

NOTE
The patient cannot see this chat.

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



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

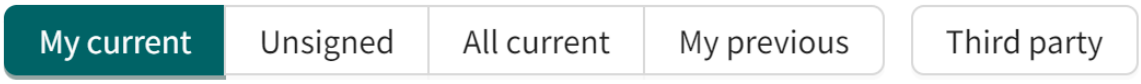


3. New messages are indicated by a number next to the chat icon.

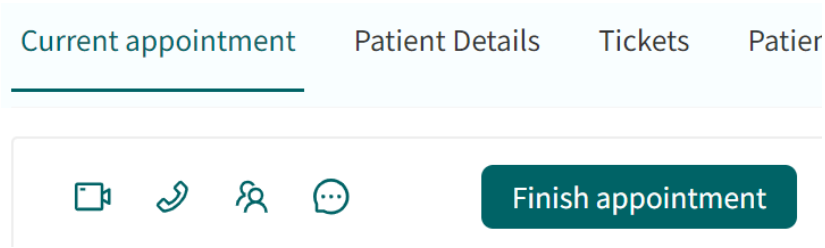


If you have been invited to a patient chat

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

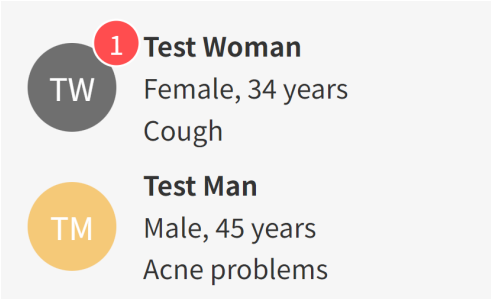


3. Select the **Third party** tab and click on the current patient to open the patient chat.
4. Click on the chat icon ( ) to also open the practitioner chat.



12.4.6. Parallel chats

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



12.5. Handing over or transferring visits

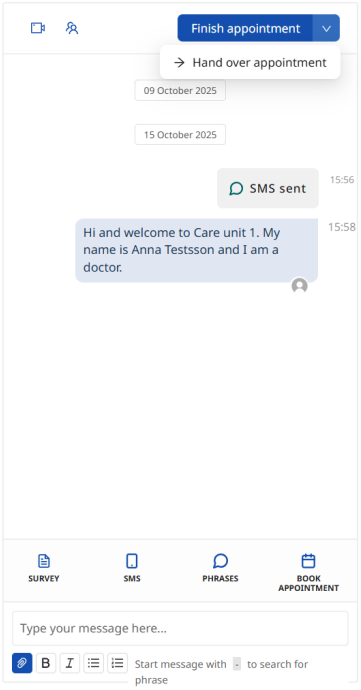
12.5.1. Overview

The hand over visits feature enables a care provider to hand over a visit to another role or specific care unit during a synchronous visit. (**1** in image below)

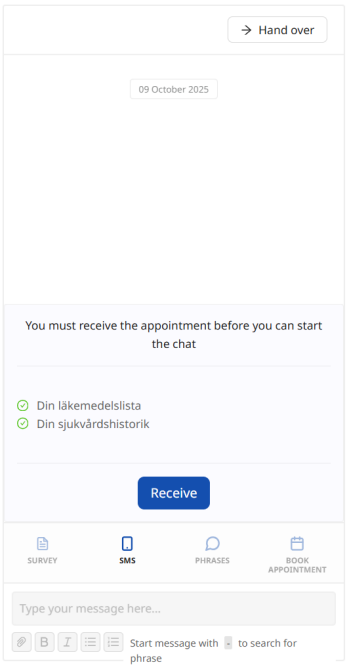
A visit can also be handed over to another role or care unit before the visit is initiated, and this is done by using the **Hand over** button at the top right of the chat module. (**2 a** and **2 b** in image below).

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

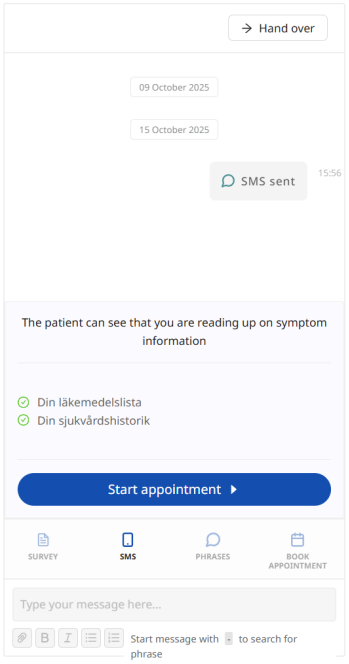
1. Handing over a visit during a synchronous visit



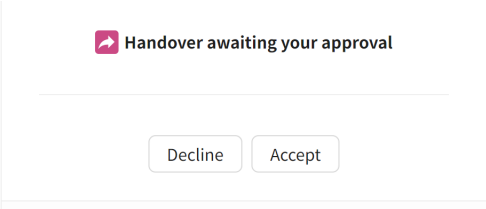
2 a. Handing over a visit before the visit is initiated, before clicking **Receive**.



2 b. Handing over a visit before the visit is initiated, after clicking **Receive**.



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

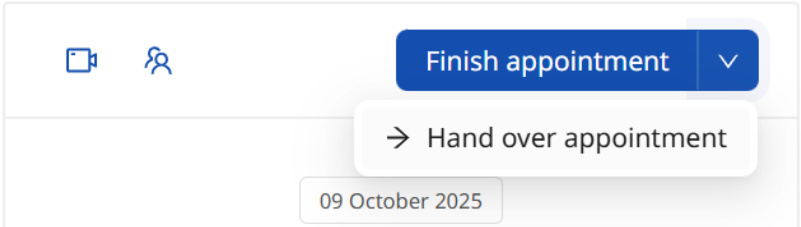


In the Patient app, the transfer process is displayed as a system message, e.g. “Care unit A has transferred the visit to care unit B”. The patient will also receive a text message informing them that a new care unit has taken over the appointment.

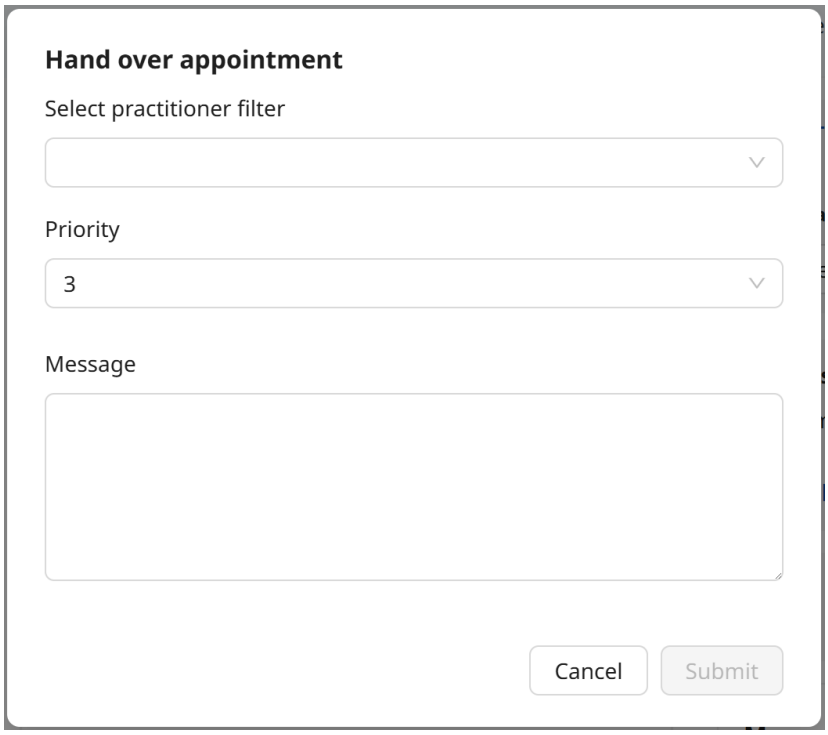
12.5.2. Handing over during an ongoing visit

To hand over a visit to another healthcare practitioner during an ongoing visit:

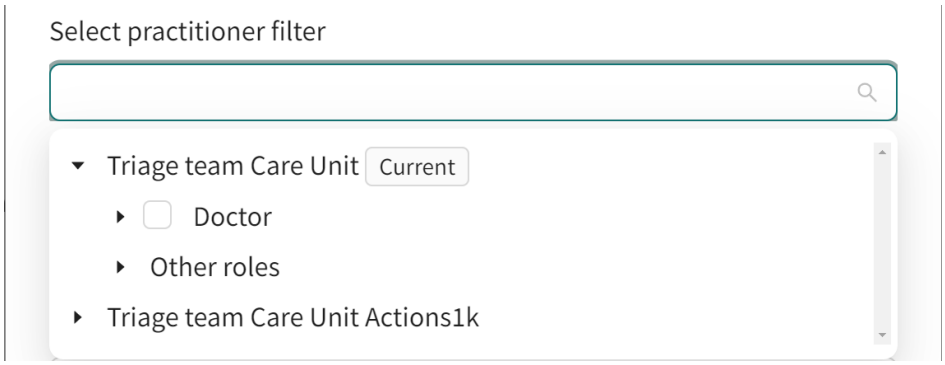
1. Click on the arrow next to **Finish appointment** and select **Hand over appointment**.



This opens the **Hand over appointment** dialog.



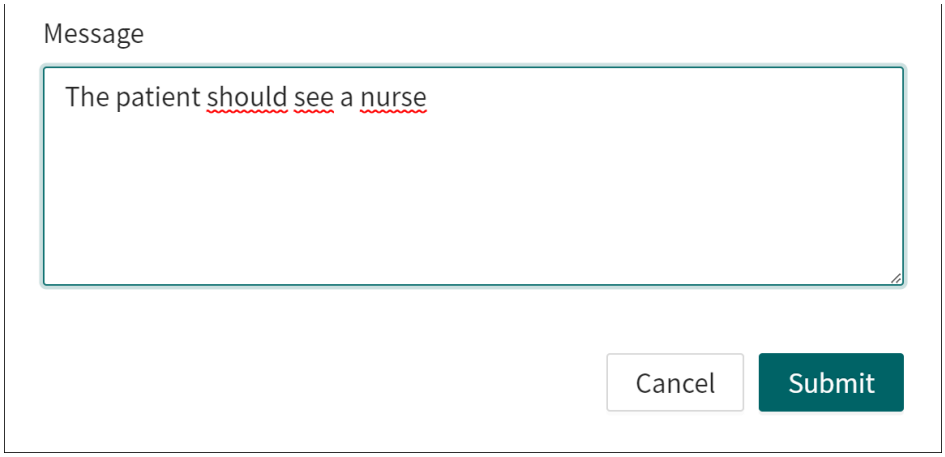
2. Select the receiving practitioner via the **Select practitioner filter** drop-down menu, or search for a specific name. Your own care unit is marked as **Current**.



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

3. If needed, add or adjust the **Priority** of the visit (1 is the most urgent).

4. Enter a message for the receiving party in the **Message** field. This information is not displayed to the patient. The information about why a patient is being handed over is only available for healthcare practitioners.



5. Click **Submit**.

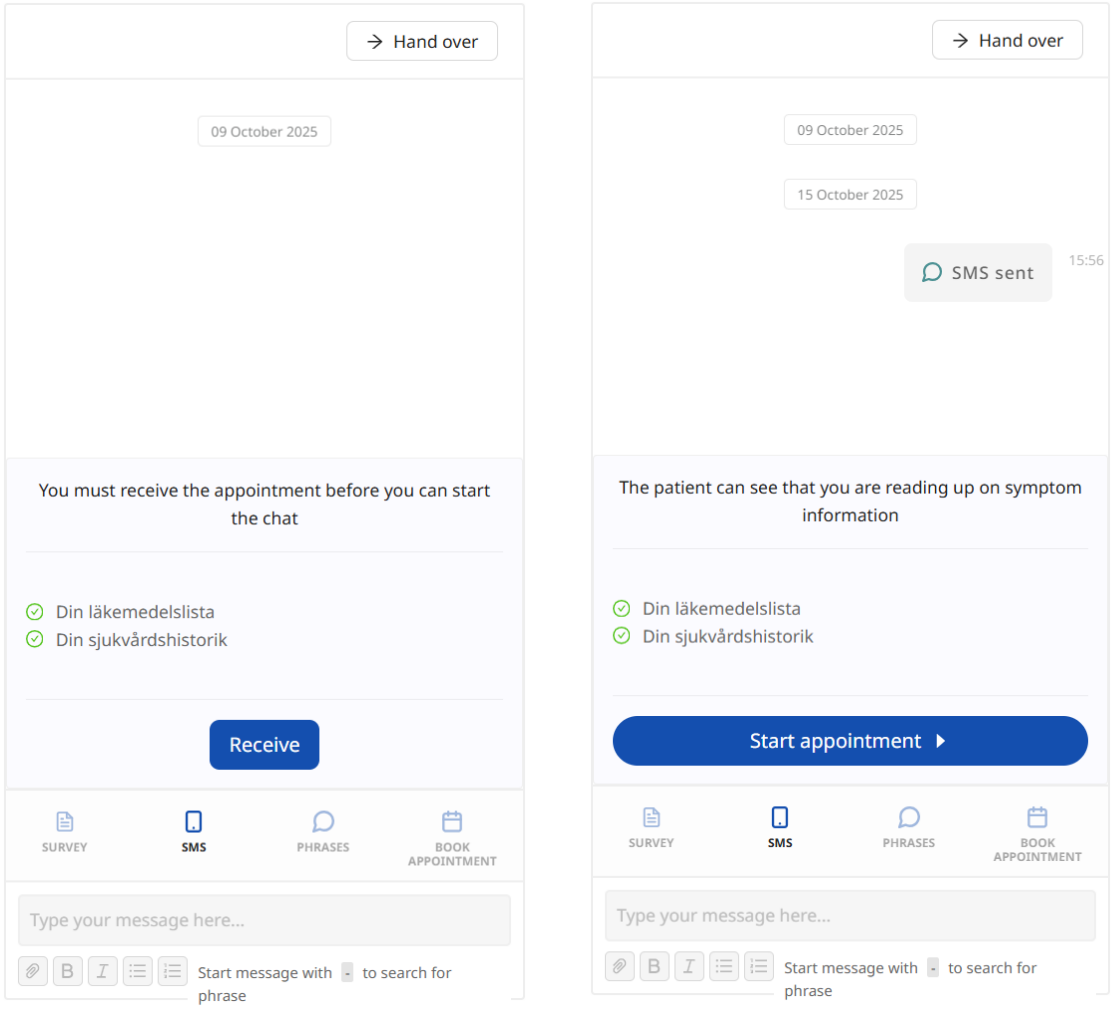
IMPORTANT
Until your visit handover has been accepted by a recipient, you remain the responsible practitioner for the visit, and it is visible to you as an active, ongoing visit in the main menu in Clinic and in the **Ongoing** tab in the **Drop-in visits** page.

Follow your care unit's routines regarding the allocation of documentation and who is responsible for entering information into the patient's medical record during and after the handover.

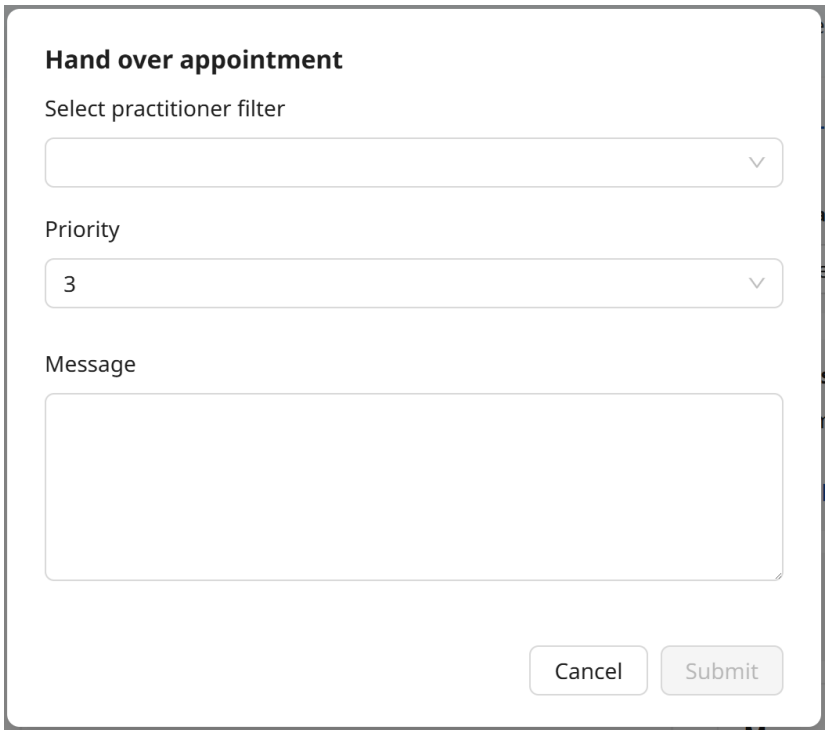
12.5.3. Transferring visit before receiving

To transfer visits to other healthcare practitioners before a visit has been received:

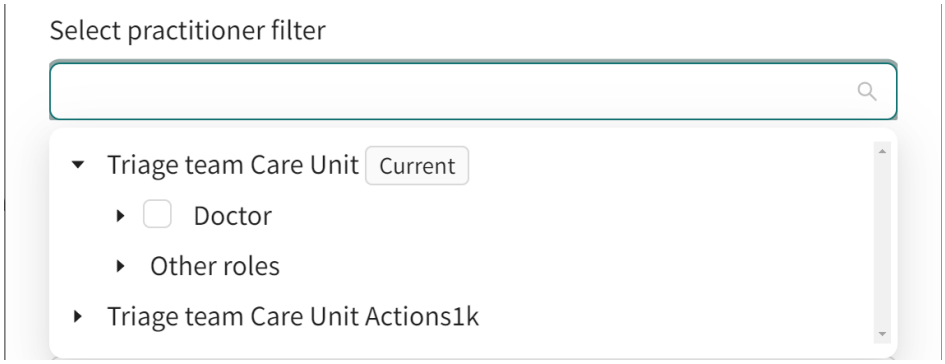
1. Click on the **Hand over** button at the top right of the chat module.



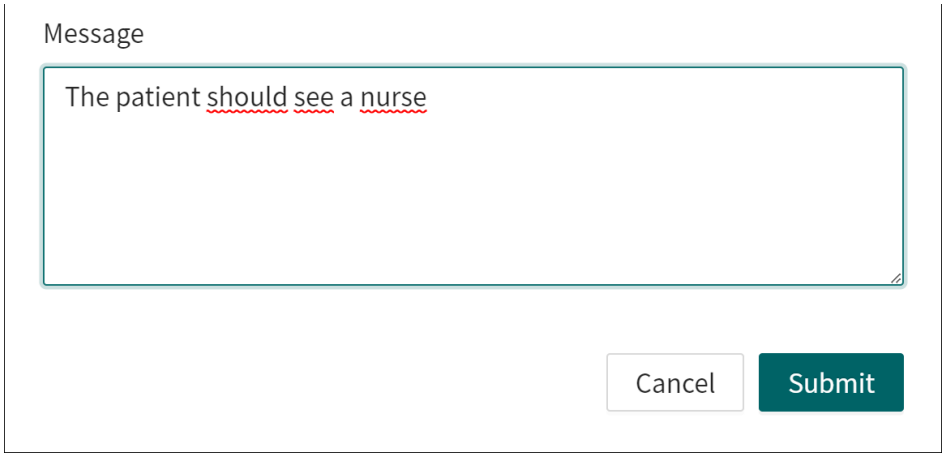
This opens the **Hand over appointment** dialog.



2. If needed, add or adjust the **Priority** of the visit (1 is the most urgent).
3. Select the receiving practitioner via the **Select practitioner filter** drop-down menu or search for a specific name. Your own care unit is marked as **Current**.



4. Enter a message for the receiving party in the **Message** field. This information is not displayed to the patient. The information about why a patient is being handed over is only available for healthcare practitioners.



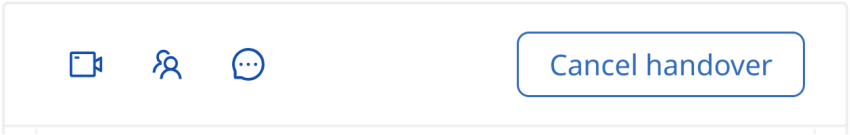
5. Click **Submit**.

IMPORTANT
Until your visit handover has been accepted by a recipient, you remain the responsible practitioner for the visit, and it is visible to you as an active, ongoing visit in the main menu in Clinic and in the **Ongoing** tab in the **Drop-in visits** page.

Follow your care unit's routines regarding the allocation of documentation and who is responsible for entering information into the patient's medical record during and after the handover.

12.5.4. Cancel a visit handover

If you want to cancel an ongoing handover before the recipient has had time to accept it, click the **Cancel handover** button above the chat in the ongoing visit.

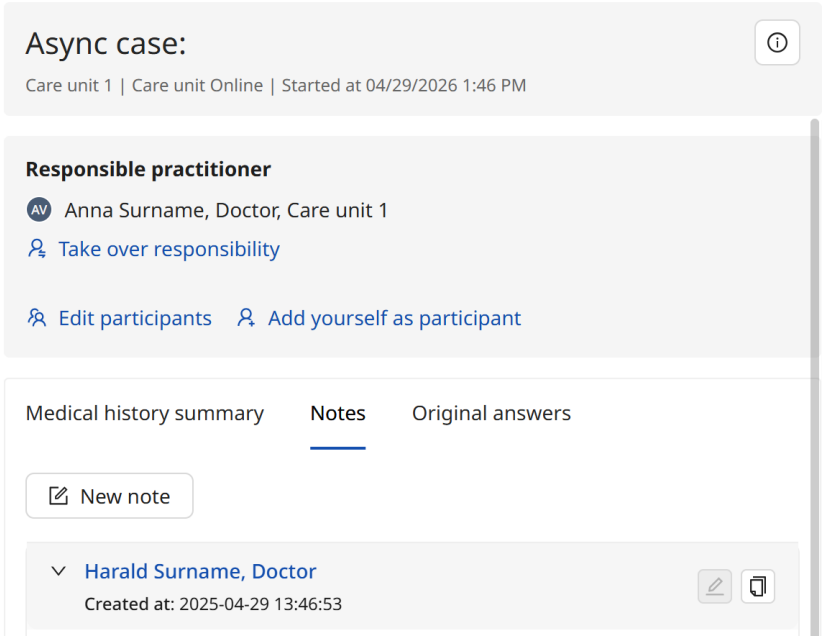


12.6. Taking over an asynchronous case

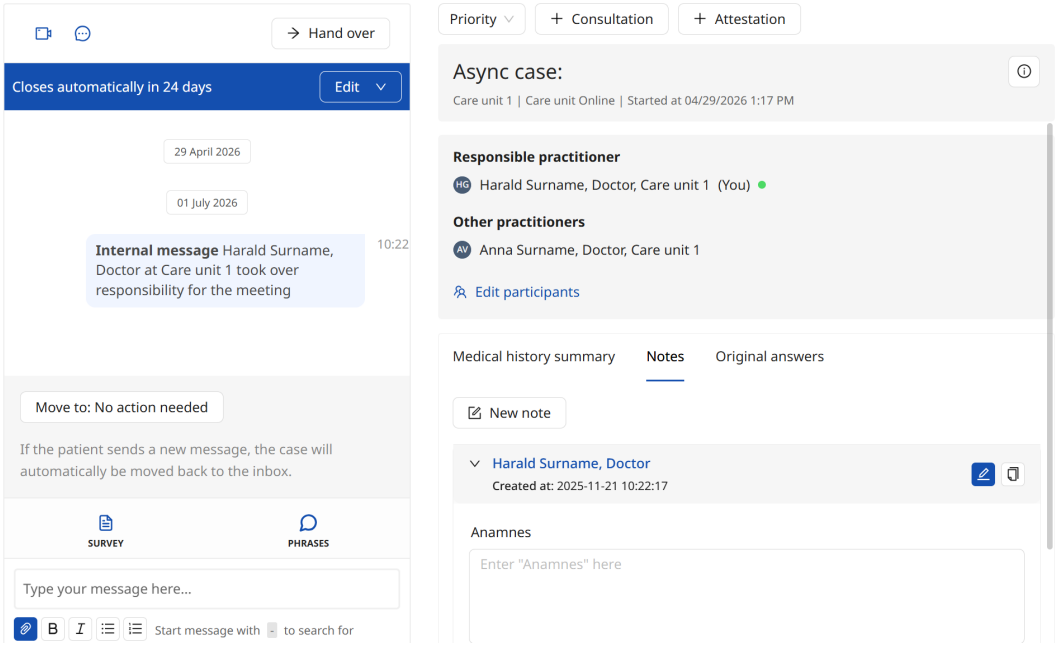
To take over an active asynchronous case:

1. Open the specific asynchronous case from the list in the **Async cases** view.

2. Click **Take over responsibility**.



3. You have taken over your colleague's asynchronous case and are now listed as the **Responsible practitioner**. Your colleague is now listed under **Other practitioners**.



An internal system message is automatically sent in the chat to confirm that you have taken over the case. This message is visible only to health care practitioners and cannot be seen by the patient.

NOTE
Follow local procedures for documentation distribution and for assigning responsibility for recording information in the medical record during and after the handoff.

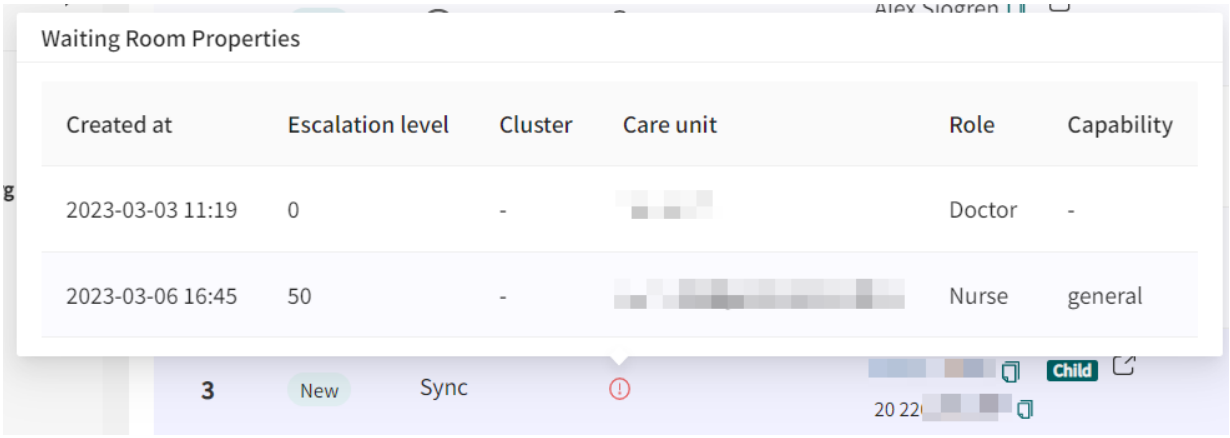
12.7. Escalated visits

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

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

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

Hover over the "i" icon for a visit to see the escalation level and other attributes.

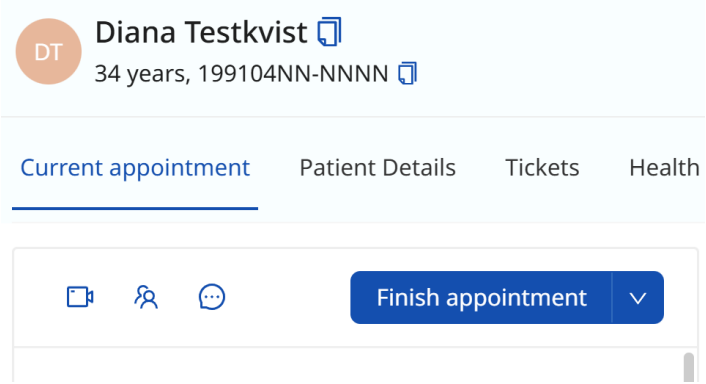


12.8. Ending a visit

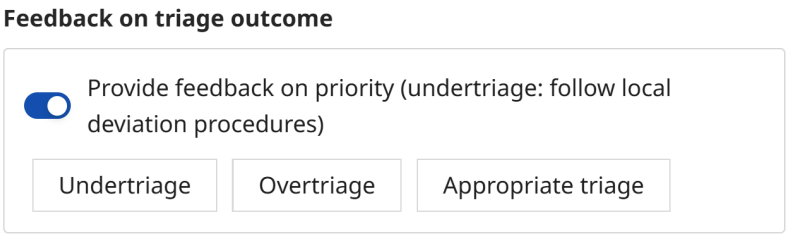
If your care unit has an asynchronous period (a period after a finished visit when the patient can chat in the asynchronous phase of the same visit), this will be displayed above the chat. Click **Change** to prematurely end the asynchronous period, and then select conclude asynchronous phase.

TIP
It is possible to end a visit for a colleague if needed.

1. Above the chat module of the ongoing patient visit, click the **Finish appointment** button.



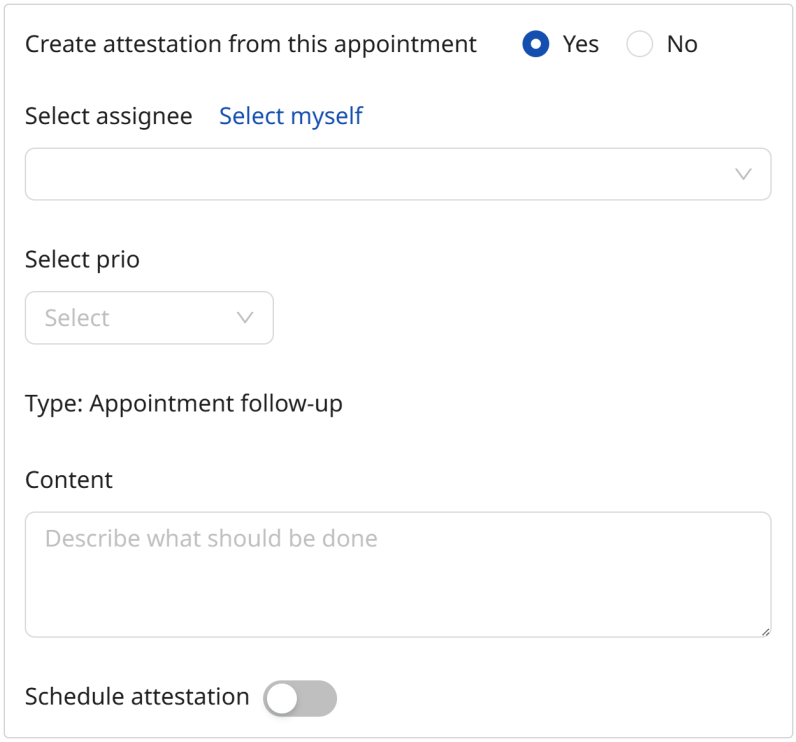
2. A new window opens. Depending on your care unit's settings, you can for example select to:
   - **Provide feedback on triage outcome**: Activate the **Provide feedback on priority** option to provide feedback on the priority of the visit: *Undertriage*, *Overtriage*, or *Appropriate triage*. In the event of undertriage, follow your care unit's local deviation procedures.



   - **Activate an asynchronous phase during the visit**: An asynchronous phase is a follow-up period during which you and the patient can continue to communicate about the case via asynchronous messages, if necessary. You choose whether to activate an asynchronous phase and how long it should last. If the asynchronous phase is set to at least three days, you can also choose whether an automatic, asynchronous follow-up message should be sent to the patient after three days. You initiate the automatic message by activating the **Send follow-up message after 3 days** option.



   - **Create an attestation**: It can be useful to create an attestation if there is a specific task that you or someone else needs to perform or follow-up on after the visit has ended. If you choose to create an attestation:
     a. Click **Yes** in the **Create attestation from this appointment** option.
     b. Select the person responsible for the attestation by either selecting yourself or clicking the field to open a tree structure with roles and specific individuals to choose from.
     c. Set the priority/urgency of the attestation item (where priority 1 is the most urgent).
     d. Describe what the attestation item concerns in the **Content** field, for example what needs to be done or followed-up, based on your organization's work routines.
     e. Activate the **Schedule attestation** option to schedule the attestation. You can select to make the attestation visible in the attestations list on a specific future date.



3. Click the **Finish appointment** button.

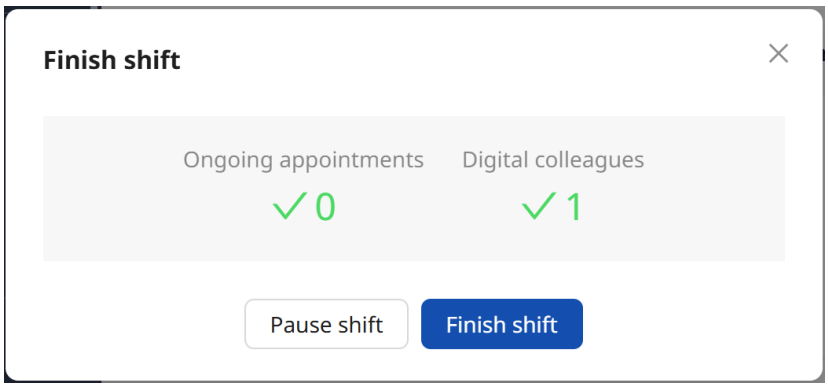


13. Ending a shift in Clinic

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



2. Verify that you do not have any ongoing visits/cases.



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

3. Click **End shift**. If you instead want to pause your shift, click **Pause shift**.
   a. **Ending a shift**: Enables you to completely finish your shift, and no longer be visible to colleagues and unable to receive notifications (if your care unit has enabled this function).
   b. **Pausing a shift**: Enables you to log out, but with an active shift, allowing you to stay visible to colleagues and still receive notifications (if your care unit has enabled this function).

14. Technical issues

14.1. Overview

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

14.2. For practitioners

- Verify that the hardware and software specifications for your system are fulfilled. For details see Hardware and software specifications Clinic/Manage [7].
- If there is no sound, and the computer has an F1 key with a sound icon, make sure the F1 button is not enabled.
- Test that the microphone and camera work using the hardware test function in your user profile. For more information, refer to Your profile [101].
- If the sound and video do not work and you have installed a new microphone and camera, contact your IT support.
  - Make sure you have a good connection and that you are connected to the healthcare unit's network. If necessary, make sure your internet is fast enough by testing it at https://bredbandskollen.se.

14.2.1. Video

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

- Log out from Clinic, shut down your computer and restart it.

If it still does not work, try the following:

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

14.2.2. Clear cache (web history)

Cache contains temporary files that your browser saves. Clearing your cache files (browsing history), can resolve several issues, such as not being able to log in, not seeing messages for multiple

patients, Clinic loads very slowly, clicking on functions that do not respond, or not being able to see when you are unbooked.

Empty the cache:

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

14.3. For patients

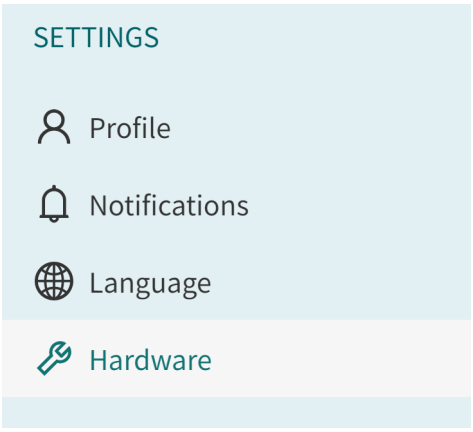
1. If the video or sound does not work: Check that the patient has agreed to share a microphone and camera.
2. If the patient uses a computer and the video and sound does not work: Ask the patient if they have a computer with an installed microphone.
3. The web browser must be updated to the latest released version.
   Supported web browsers are:
   - Google Chrome
   - Mozilla Firefox
   - Microsoft Edge
   - Safari on macOS
4. Sometimes it can work better if the patient switches from a computer to a smartphone or tablet. The patient then logs in with your web link, and can directly access the online visit.
5. If the patient uses a Smartphone or a tablet, the device must be updated to Android version 10.0 or above. For iPhone or iPad users, the device must be updated to one of the three latest major versions of iOS or iPadOS.
6. The patient must have a stable internet connection with at least 600 kb/s of bandwidth per stream during calls.
7. If someone calls the patient during the video call, the video call will be paused and then continue as soon as the patient has finished the incoming call (so do not end the visit before it is over).

15. Technical equipment

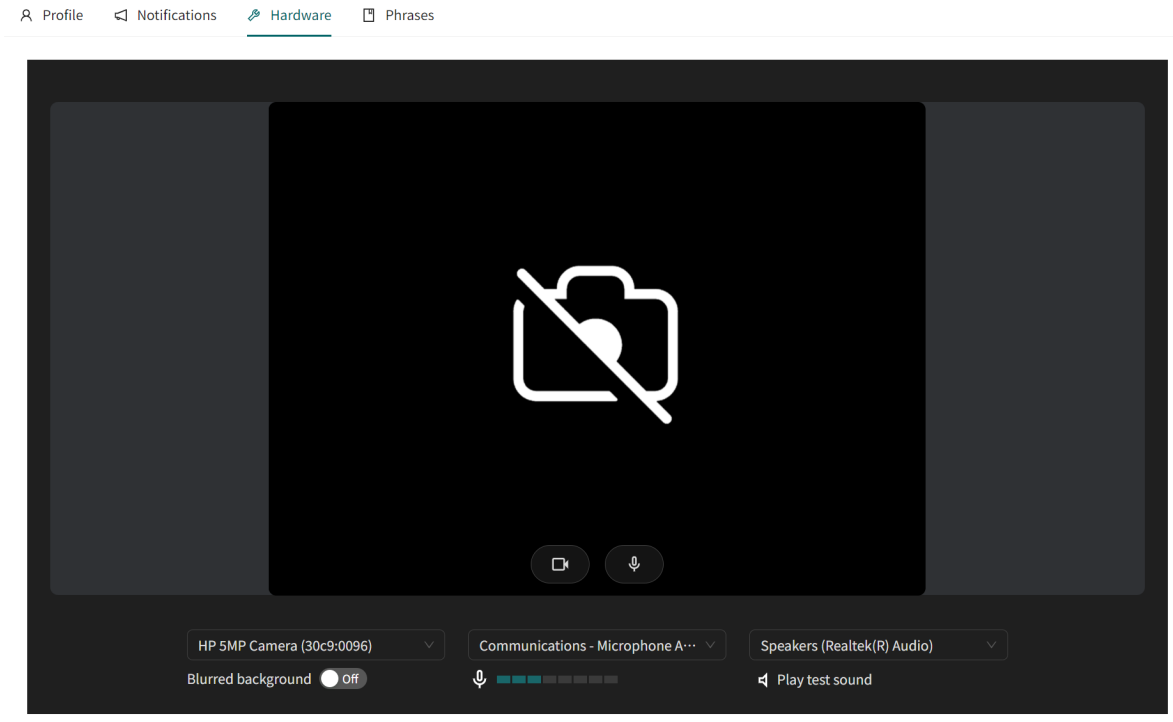
15.1. Hardware

Hardware refers to a microphone and a camera.

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

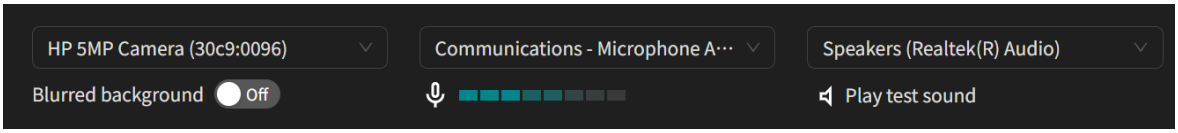


This opens the **Hardware** tab. In the video window you can see if the camera is active and exactly what is displayed. There is also the possibility to disable the camera and sound.



3. Select the camera, microphone and speakers you want to use from the lists (if you have several to choose from).

   You can also select to blur the background, test the microphone and speakers. If the microphone is working as expected, color will be displayed in the sound bar.



15.2. Check that video and audio are enabled in Chrome

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

16. Terms and definitions

Administrator	Those at your care unit who administer employee access rights for Clinic, and who are responsible for entering any autophrases the care unit requires in Clinic.
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.
Chrome	A web browser (such as Internet Explorer and Safari).
Customer Success Manager (CSM)	A CSM (Customer Success Manager) is the customer's main strategic advisor. The CSM is also the customer's main contact person for any contractual, commercial questions/issues. The CSM is the first point of escalation for any unsolved questions/requests/issues
superuser	A superuser is an end user with increased knowledge and responsibility around the platform at each care unit. The superuser acts as the first-line support for the end users on the device and is the one who turns to Platform24 for further support, if necessary.
unique personal identifier	For practitioners: can be for example e-mail, HSA-ID For patients: can be for example e-mail, personal identity number, insurance number, BSN
URL	People often talk about URLs in digital contexts. The URL is an address of a web page. Each patient appointment in Clinic has a specific URL. You will see the URL associated with a specific patient appointment in the address bar in the chat module.

17. Manual versions

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

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

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

#	Date	Description
8.0	2026-10-15	Main updates are: • Name of the manual and references to other manuals changed from User Manual to Instructions for Use. • 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. • General: New color scheme of the main menu reflected in the images. • General: Restructuring of chapters in the manual where, for example, previous separate chapters are grouped into the new chapter *12. Managing visits*. • General: Appointment changed to visit in most instances. • The note has been updated in section *1.1. About this manual*. • Introductory sentence added to section *3.1. Symbols definition* to clarify that this section describes symbols in the user interfaces and in the instructions for use. Definition of caution symbol updated. • Caution level in section *3.2. Precautions definition* removed. • New sections/chapters: *1.2. Hardware and software specifications Clinic/Manage*, *4. Intended use Platform24*, *10.5.1. Calendar filtering options*, *10.5.2. Compare schedules side-by-side*, *10.5.4. Book patient directly from the calendar*, *10.6.2. Manage an ongoing drop-in visit*, *10.6.3. Manage participants in an ongoing visit*, *10.8.2. Starting a new asynchronous case*, *10.9. Conference calls*, *10.10.2. Upcoming attestations*, *10.10.6. Attest an attestation*, *10.11.1. Request a consultation*, *10.11.3. Add and remove additional participants in a consultation*, *10.11.4. Receive and start a consultation*, *10.11.5. Cancel or finish a consultation*, *12.3. Start visits* (including the sub-sections), *12.4. Features that can be used in online visits*, *12.5.4. Cancel a visit handover*, • Updated sections/chapters: *3.1. Symbols definition*, *5. Summary*, *6.2. Read up prior to a patient visit*, *7.1. Log in to Clinic*, *9.2. Different shift types*, *10. Main menu* (including most of the sub-sections), *10.2.1. Search for a patient*, *10.3. Global resource filter*, *10.6. Drop-in visits*, *10.5.9. Using tags in time slots*, *11.3.1 Chat module*, *11.3.4 Exit care advice*, *11.3.5 Medical record notes*, *11.4.3. Warnings*, *11.4.4. Internal notes*, *11.5.1 Viewing created tickets*, *11.5.2. Creating new tickets*, *11.8. Patient activity*, *11.9. Prescriptions*, *11.11. New visits, consultations and tickets*, *10.17. Your profile*, *12.1.1. Book a visit*, *12.1.2. Visit types*, *12.1.3. Book a scheduled visit*, *12.1.4. Book a video visit*, *12.1.5. Book an offline visit*, *12.2.1. Change time or cancel appointment*, *12.2.2. Appointments booked by healthcare practitioners*, *12.3.1. Start a drop-in visit*, *12.3.2. Start a scheduled visit*, *12.3.3. Start a video visit*, *12.4.1. Initiating a video call with the patient in the chat*, *12.4.4. Three-way video calls*, *12.4.5. Inviting colleagues to patient or practitioner chat*, *12.4.6. Parallel chats*, *12.8. Ending a visit*, *12.5.1. Overview*, *12.5.2. Handing over during an ongoing visit*, *12.5.3. Transferring visit before receiving*, *12.5.4. Cancel an appointment handover*, *12.7. Escalated visits*, *12.8 Ending a visit*, *13. Ending a shift in Clinic*, *14.2. For practitioners*, *14.2.1. Video*, *14.2.2. Clear cache (web history)*, *14.3. For patients*, *15.2. Check that video and audio are enabled in chrome*. • Restructuring of sections in chapter *10. Main menu* to reflect the new structure of menu items in the main menu.

#	Date	Description
		• Previous section *11.1. Overview* renamed to *10.1. Main menu items* and updated with a description of all menu items. • Note about that the start page eventually will be removed added in sections *10.1. Main menu items* and *10.4. Start page*. • Section "Time slots" renamed to "Calendar" (currently section *10.5*) and updated with images and instructions. It is now for example possible to book a patient appointment directly from the calendar view. It is also possible to view colleagues calendars side-by-side for a selected day. • Section *10.10. Attestations*, including underlying sections, rewritten to reflect changes in the user interface. Information added that attestations also are visible in the calendar view. • Section *11.4.2. Protected identity* merged with section *11.4.1. Patient info* and updated. • Previous chapter *15. Creating and conducting an offline appointment (physical appointment)* updated and renamed to *12.1.5. Book an offline visit (physical visit)*. • "Move" changed to "hand over" as well as updated images in *12.5. Handing over or transferring visits* and underlying sections. • Removed sections:*4. Safety Precautions*, *10.6.2. Received*, *10.6.3. Finished*, *11.11. Completed video test*, *12.4. Sending a provider-initiated asynchronous message*, *14.1. Receiving the patient*, *17. Support*, *17.1 Overview*, *17.2 Checklist*. • Sections updated following the merger of the visit type "Scheduled free" with "Scheduled": *6.2. Read up prior to a patient visit*, *10.7. Scheduled Visits*, *12. Managing Visits* and subsections, *12.2. Rebooking a patient* and subsection, *12.3.2. Start a scheduled visit*. • Section *10.8. Asynchronous cases* and subsections, and Section *12.6. Taking on an asynchronous case* updated to reflect the terminology change from asynchronous messages to asynchronous cases. • Section *10.10. Attestations* and subsections updated to reflect changes in user interface. Section *10.10.4. Attestations attested by me* renamed *10.10.4. Attested items*.