ENGLISH

platform24

Instructions for Use – Content Studio+

Manage

Manual version 19.0
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CE
2862

MD

UDI

UDI-DI: 7350127221004

Triage24 Medical Device Version 1

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

2022-11-01

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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Table of Contents

1. Introduction 6
1.1. About this manual 6
1.2. Hardware and software specifications Clinic/Manage 6
2. Contact details 7
2.1. Manufacturer 7
2.2. Support 7
2.2.1. End user support 7
2.2.2. Urgent cases 7
2.2.3. Non urgent cases 7
2.3. Feedback and questions regarding the instructions for use 7
2.3.1. Request printed version of the instructions for use 7
3. Definition of symbols and precautions 8
3.1. Symbols definition 8
3.2. Precautions definition 8
4. Warnings 10
5. Triage24 - Intended Use 12
5.1. Triage24 12
5.1.1. Modules of Triage24 12
5.1.2. Intended use for Triage24 12
5.1.3. Intended user profile for Triage24 13
5.1.4. Intended operational environment for Triage24 13
5.1.5. Clinical Benefits 13
5.1.6. Performance characteristics 13
5.1.7. Implementing Triage24 in the healthcare organization 14
5.2. Content Studio+ module 14
5.2.1. Intended use for Content Studio+ 14
5.2.2. Intended users for Content Studio+ 14
5.2.3. Intended operational environment for Content Studio+ 14
5.3. Patient triage module 14
5.3.1. Intended use for Patient triage 14
5.3.2. Intended users for Patient triage 14
5.3.3. Intended operational environment for Patient triage 15
5.4. Assisted triage module 15
5.4.1. Intended use for Assisted triage 15
5.4.2. Intended users for Assisted triage 15
5.4.3. Intended operational environment for Assisted triage 15
5.5. Contraindications Triage24 16
5.5.1. Patients 16
6. What is Manage and Content Studio+? 17
6.1. Platform24 environments 17
6.2. Log in to Manage 18
7. Basic Details - Content Studio+ 19
7.1. Working with Content Studio+ 19
7.2. Access to Content Studio+ 20
7.3. Overview of questionnaires and self-care information 21
7.4. Questionnaire details 22
7.5. Change management and tracking 25
7.5.1. Sending changes for technical review before release to production 28
7.6. Warnings 30
7.6.1. Overall warnings 30
7.6.2. Warning in the event of changes 32
7.7. Languages 32
7.8. Deleting and undoing component changes 33

7.8.1. Deleting and recalling components 34
8. Grouping and using questionnaires and self-care information 35
8.1. Assessments 35
8.1.1. Editing existing questionnaires 36
8.1.2. Creating new questionnaires 38
8.1.3. Replacing existing questionnaires 40
8.2. Libraries 41
8.2.1. Editing existing libraries 41
8.2.2. Creating new libraries 44
8.2.3. Replacing existing libraries 47
8.3. Practitioner-initiated 48
8.4. Self-care information 48
8.4.1. Existing self-care information 48
8.4.2. Creating new self-care information 49
8.4.3. Editing existing self-care information 50
8.5. Triage 50
8.5.1. Editing existing questionnaires 51
8.5.2. Creating new questionnaires 53
8.5.3. Replacing existing questionnaires 56
8.6. Statistics 58
8.7. Unit tests 59
8.7.1. The interview 60
8.7.2. Conducting unit tests 60
8.7.3. Searching for tests 65
8.7.4. Deleting tests 65
9. Components in Questionnaires 67
9.1. Metadata 67
9.1.1. Attributes and values in Metadata 67
9.2. Sections 68
9.2.1. Pre-triage 68
9.2.2. Post-triage 68
9.2.3. Health tests 68
9.2.4. Pre-Post triage 69
9.3. Search terms 69
9.3.1. Attributes and values in the Search term component 69
9.3.2. How to add a search term 70
9.3.3. Unique search terms and the Display option 72
9.4. Questions 73
9.4.1. Attributes and values in Questions 73
9.5. Exits 79
9.5.1. Attributes and values in exits 79
9.5.2. Exit care advice 85
9.5.3. Breaking exits 88
9.5.4. Default exits 88
9.6. Formulas 88
9.6.1. Attributes and values in Formulas 89
9.7. Include 92
9.7.1. Attributes and values in Include 92
9.8. Go to another questionnaire 97
9.8.1. Attributes and values in Go to another questionnaire 97
9.9. Import data 99
9.9.1. Attributes and values in Import data 100
9.10. Export data 100
9.10.1. Attributes and values in Exporting data 101
9.11. Call questionnaire 101

9.11.1. Attributes and values in Call questionnaire 101
9.12. Flags 102
9.12.1. Attributes and values in flags 104
10. Frequently occurring attributes 108
10.1. ID 108
10.2. Patient 108
10.3. Build time if 108
10.4. Condition 111
10.5. Choose first [ ] alternative if 112
10.6. Properties 113
10.7. Response options 114
10.8. Points 114
11. Automated summary 115
11.1. Introduction to automated summary 115
11.2. Text components 116
11.3. Categories 117
11.3.1. Question response 117
11.3.2. Own sentence 118
11.3.3. Hidden 121
11.4. Other question types 121
11.5. Negate Multiple choice questions 121
12. Terms and definitions 123
13. Manual versions 124

1. Introduction

1.1. About this manual

This is the instructions for use for Content Studio+, the medical developer user interface within Manage.



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

For questions about editing medical content, contact the Customer Success Manager at Platform24.

2.2.2. Urgent cases

For urgent support cases users should call the Platform24 support phone number below.

Phone: +46 (0) 10-140 23 21

2.2.3. Non urgent cases

For all non urgent support cases users 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, users 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>

2.3.1. Request printed version of the instructions for use

The instructions for use (IFU) is available in digital format in the user interface and on the Platform24 webpage.

If you require a paper version of the instructions for use, contact Platform24 via:

E-mail: <support@platform24.com>

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

3. Definition of symbols and precautions

3.1. Symbols definition

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

CE 2862	CE marking
MD	Medical Device
UDI	Unique Device Identifier
	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. Warnings

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

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

WARNING
Any changes to the medical content via Content Studio+ have essentially an impact on patient journeys and triage. This puts high demands on everyone editing in Content Studio+ to ensure they have training in how the tool works and use this guide to further understand the functionality.

WARNING
The medical responsibility for content changes lies with the customer carrying out the changes. This means that responsibility to test that any changes made work as intended lies also with the customer.

WARNING
Make sure to test all changes made and identify any ensuing changes required to ensure patient-safe flows.

WARNING
Visualizations do not show components with values in `Build time if`. For this reason, do not only use the visualizations to understand the structure of the questionnaires.

Recommended use together with the basic view for questionnaires to obtain an overall understanding.

WARNING
Removing a component can pose a patient-safety risk unless a careful analysis of the effects is performed. Make sure to test any changes made and identify any ensuing changes required to ensure patient-safe flows.

WARNING
If a change is made in a **Library**, the change will affect all questionnaires where the **Library** is used. Consider therefore carefully when editing.

WARNING
Editing and adding assessments can pose a patient safety risk unless a careful analysis of the effects is conducted. Make sure to test any changes made and identify any ensuing changes required to ensure patient-safe flows.

WARNING
Editing and adding to questionnaires in the **Triage** sub-menu can pose a patient-safety risk if a careful analysis of the effects is not performed. Make sure to test any changes made and identify any ensuing changes required to ensure patient-safe flows.

5. Triage24 - Intended Use

5.1. Triage24

Triage24 is a medical device consisting of a configurable logic based rule engine for medical triage developed for use in healthcare services. It enables healthcare providers to populate it with *medical content* and business logic that makes it possible to automate triage and direct patients to appropriate pathways within the healthcare system. These pathways can be digital, physical or digi-physical in nature.

Triage24 is intended to be configured and adopted to the conditions and needs of a specific healthcare provider. This is achieved either through a service provided by Platform24 or its affiliates or by the healthcare provider. The configuration of the system is made through a web user interface.

The configured implementation of the device allows patients to initiate contact, through an associated application (Patient app), with healthcare providers by answering questions about their medical complaint, medical history and health status. It also allows practitioners, on behalf of a patient, to triage the patient by answering questions in the practitioner user interface, which the patient answers.

Based on his/her answers, the patient is (either in the patient or practitioner application) directed to an appropriate level of care, as determined and configured by the health care provider. Such levels are for example: emergency care, physical appointment, digital appointment or self-care. That care can be provided to the patients through a physical meeting or digital meeting with a healthcare provider. Digital appointments can be facilitated through Platform24, which provides both a practitioner and a patient interface.



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.

5.1.1. Modules of Triage24

Triage24 consist of three modules. The modules are connected to a specific user group, and *user interface* (*UI)* for these groups.

a. Content Studio+
b. Patient triage
c. Assisted Triage

See also Intended users [13]

5.1.2. Intended use for Triage24

Triage24's *intended use* is to:

Triage24 is intended to provide patients with a recommendation of an appropriate level of care, based on urgency of the symptoms reported by the user. By doing so, the product aids with the investigation of a patient's pathological state, and supports efficient triage and effective management of healthcare resources.

Triage24 is intended to be adapted to the unique requirements and operational needs of each healthcare provider through configuration of medical content and business rules. This configuration may be performed by Platform24 or its affiliates, or directly by the healthcare provider, ensuring alignment with specific clinical workflows and organizational needs.

Triage24 is not intended for diagnosis, but to investigate the medical state of the patient to the extent necessary to provide the mentioned guidance to a suitable level of care.

5.1.3. Intended user profile for Triage24

Intended users

Triage24 has three distinct target groups.

- **Medical content developers** who are trained healthcare personnel, employed or contracted by a healthcare provider utilizing Triage24. The medical content developers' role is to configure and adopt to the conditions and needs of a specific healthcare provider through population with medical content and business rules.
- **Patients** seeking healthcare treatment for themselves or for a child in their care. Patients are the recipients of the device's intended clinical benefits.
- **Healthcare professionals** (or practitioners) who are trained healthcare professionals, employed or contracted by a healthcare provider utilizing Triage24. If patients are unable to themselves use Triage24 and digitally input their symptoms, health care personnel can instead enter these symptoms into Triage24 and obtain results based on the medical content with which Triage24 is populated.

5.1.4. Intended operational environment for Triage24

Triage24 is intended to be used by healthcare providers and healthcare systems in countries where the population has access to internet through smartphones and/or computers.

5.1.5. Clinical Benefits

Triage24 generates clinical benefits by offering resource-efficient triage, by providing patients an automated, accurate and safe triage service, which provides patients with information on with what urgency their symptoms may need a medical assessment and/or information on self-care advice.

The accuracy and safety of Triage24 is intended to be superior or equal to that of manual triage and/or other digital triage platforms.

5.1.6. Performance characteristics

The performance of the device has been evaluated through clinical evaluations that concluded that when Triage24 is populated with medical content, it offers triage that is safer and more accurate than manual triage using the same medical content. The evaluation also concludes that the risks associated with the use of the device are acceptable when weighed against the benefits to the patient in the form of safe and accurate triage.

The performance of Triage24 depends on the configuration of medical content. Changes to the medical content can fundamentally change the result of the patient triage and therefore puts high demands on persons editing this content. Editors must have basic training in how the tool works and to use this guide to further understand the functionality.

Changes made to the medical content must be validated before it is used in the production environment with actual patients.

In addition to the validation built into the tool, each health care organisation is responsible for developing a validation- and test process for the medical content.

5.1.7. Implementing Triage24 in the healthcare organization

The Triage24 software is part of a cloud service offered to patients via the Platform24 portal. This service is controlled and provided solely by Platform24.

The decision to implement Triage24 is not made in relation to an individual patient but instead to the primary care operations of the healthcare provider. The use of the device is further adapted to the operation of the specific provider through the implementation of medical content.

For these reasons, medical staff are not required to verify the hardware or software used to access the service by an individual patient.

5.2. Content Studio+ module

Content Studio+ is the module of Triage24 created for the needs of the medical developer user group. So for administering and populating Triage24 with medical content. Medical developers interact with Triage24 via the Content Studio+ user interface.

5.2.1. Intended use for Content Studio+

Configure and adopt to the conditions and needs of a specific healthcare provider through population with medical content and business rules.

5.2.2. Intended users for Content Studio+

Medical content developers configuring the care provider's medical content.

Details

Type of user	Professional
Age	>20 years old
Level of instructions	• Instructions for use • Level *C1-C2* in the language supported in the product for the relevant market. • Undergone education and training for Content Studio+.

5.2.3. Intended operational environment for Content Studio+

Application	Manage
Interface	Content Studio+
Environment	• Home/office/public environment with connection to internet • Normal ambient conditions
Frequency of use	From several times a day to one time a week
Mobility	On a standard PC

5.3. Patient triage module

Patient triage is the module of Triage24 created for the needs of the patient user group. Patients interact with Triage24 via a patient application provided by the healthcare provider.

5.3.1. Intended use for Patient triage

Guide patients to a suitable level of care based on their symptoms, the medical content and business rules.

5.3.2. Intended users for Patient triage

The target treatment group are outpatient care patients seeking care for, or presenting with, common conditions. The patients need to be identified by the system.

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 health care 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

5.3.3. Intended operational environment for Patient triage

Application	Patient application
Interface	• Triage UI • Recommendation page
Environment	• Home/office/public environment with connection to internet • Normal ambient conditions
Frequency of use	From once a day to one time per year
Mobility	• On a standard PC • On a handheld tablet • On a smartphone

5.4. Assisted triage module

Assisted triage is the module of Triage24 created for the needs of the practitioner user group performing assisted triage. This means that the practitioner assists patients in being triaged when they cannot use the patient application themselves.

5.4.1. Intended use for Assisted triage

Perform automated triage on behalf of the patient and guide patients to a suitable level of care based on their symptoms and the medical content result.

5.4.2. Intended users for Assisted triage

Healthcare professionals working in the product.

Details

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

5.4.3. Intended operational environment for Assisted triage

Application	Clinic
Interface	Assisted triage

Environment	• Home/office/public environment with connection to internet • Normal ambient conditions
Frequency of use	Several times a day
Mobility	On a standard PC

5.5. Contraindications Triage24

5.5.1. Patients

Certain patient populations 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)

For the sake of clarity: the device Triage24 does not by itself offer medical advice, possible diagnosis, or treatment recommendations, or inform/drive management of any medical condition. If populated with medical content containing e.g., medical advice or recommendations on management, the Triage24 device can present such content to patients.

Since the intended use of the device, in its configured form populated with medical logic, is to gradually select suitable recipients of medical information, the use of the device itself entails a narrowing of the user intended to receive the given point of information.

At times, such selection will occur between patient populations that are commonplace to either include or exclude from the intended users of a medical device, such as questions regarding pregnancy which will differentiate between patients on the basis of gender. However, since this selection is inherent to the core functioning of the device, it is deemed more feasible to regard it as part of the mode of operation of the device, rather than as a contra-indication or a limitation of its diagnostic indication.

See also Intended users for Patient triage [14]

6. What is Manage and Content Studio+?

Manage is an application with the specific aim of managing users and configuring patient flows in the patient and healthcare provider apps included in Platform24. In addition to Manage, Platform24 also consists of Clinic (healthcare provider view) and the Patient app (or the Patient apps). Healthcare providers work in Clinic while patients make their digital journeys in the Patients apps.

Manage is the administration UI where healthcare providers can manage settings for Clinic, the Patient app and the medical content, as well as user roles and access rights in Manage and Clinic.

This document describes Content Studio+ (accessed through the Manage application) and how it can be used to edit the medical content.

6.1. Platform24 environments

Platform24 uses two different environments:

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

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

Links to the demo environment are provided by Platform24.

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

> **WARNING**
> The Production environment is live so any changes can affect actual patient flows and care unit settings.

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

6.2. Log in to Manage

All editing of medical content is carried out in Manage's production environment. Changes are saved in the demo environment before users can actively decide to publish them in the production environment for the Patient app and Clinic. Changes carried out in the production environment are tested in the demo environment.

Production environment

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

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

2. Log in using your selected authentication method.

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

7. Basic Details - Content Studio+

7.1. Working with Content Studio+

Content Studio+ is used to edit the medical content included in the agreement with Platform24 and to create own medical content. Any changes that are made will only be valid for the customer who makes them, which means that any customer using Content Studio+ can entirely decide the medical content used in the triage according to how the customer's operations work.

The tool is powerful and can fundamentally change patient triage, which puts high demands on anyone editing in Content Studio+ to ensure they have basic training in how the tool works and use this guide to further understand the functionality.

The changes made to the medical content using Content Studio+ must be validated before it is used in the production environment with actual patients. In addition to the validation steps that are built into the tool, it is up to each customer to develop a validation and test process for the medical changes.

In addition to a customer's own validation and test processes, a technical review of the changes will be conducted when a customer believes that their own validations and tests are ready for release into production. The assessment is intended to check that any changes that are made will not affect the technical conditions that enable the questionnaires to be used. The technical assessment does NOT include checking the impact any medical changes may have, but only that they are done correctly in a way the system can handle. An example is to check that conditions are written correctly from a technical perspective to ensure steps are not missed.

All changes made after the previous production release will be included in the technical assessment. One recommendation for customers is that they continuously release changes into production as this reduces the extent of the technical assessments.



WARNING
Any changes to the medical content via Content Studio+ have essentially an impact on patient journeys and triage. This puts high demands on everyone editing in Content Studio+ to ensure they have training in how the tool works and use this guide to further understand the functionality.



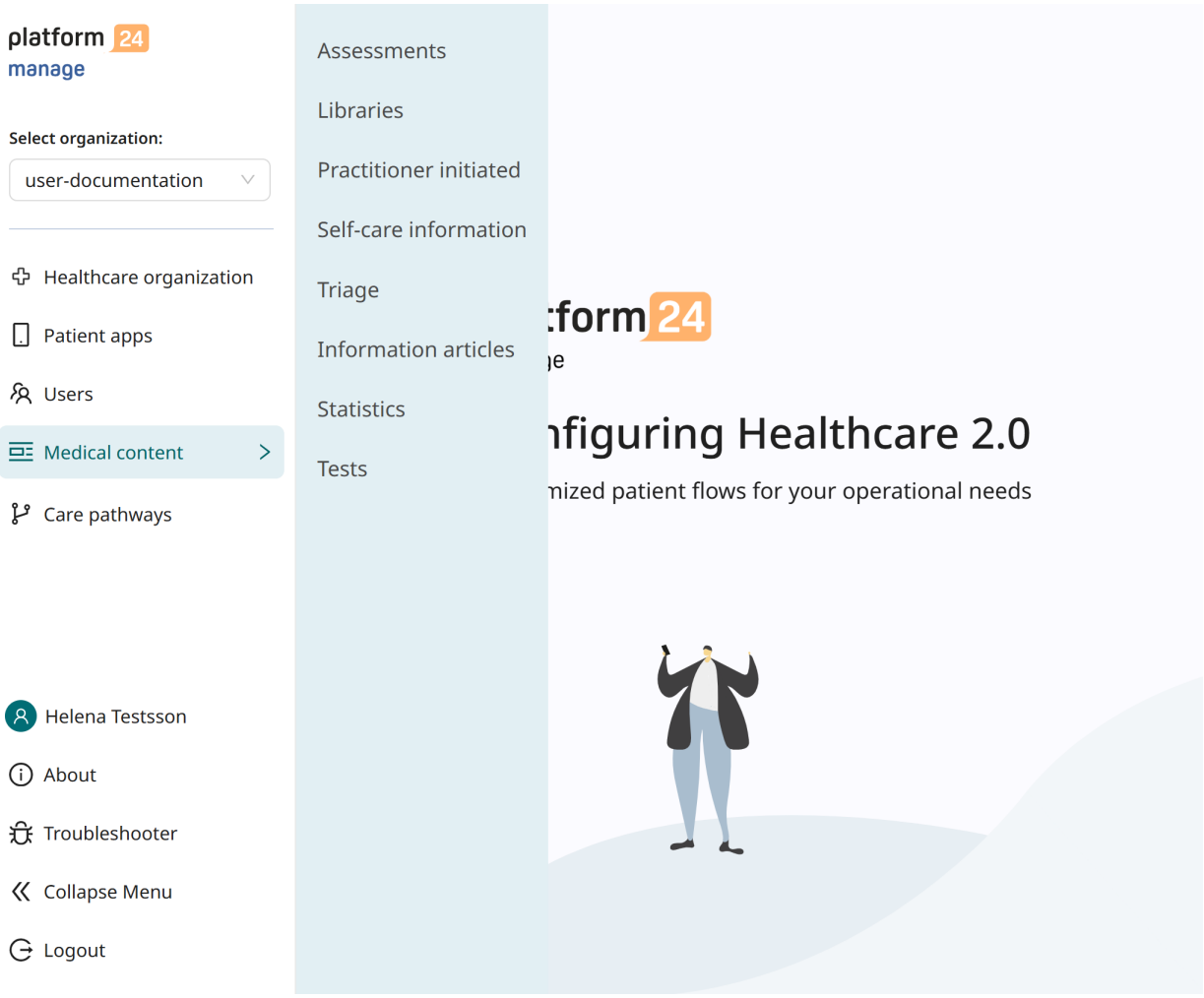
WARNING
The medical responsibility for content changes lies with the customer carrying out the changes. This means that responsibility to test that any changes made work as intended lies also with the customer.



WARNING
Make sure to test all changes made and identify any ensuing changes required to ensure patient-safe flows.

7.2. Access to Content Studio+

A main menu is displayed on the left when you log into Manage.



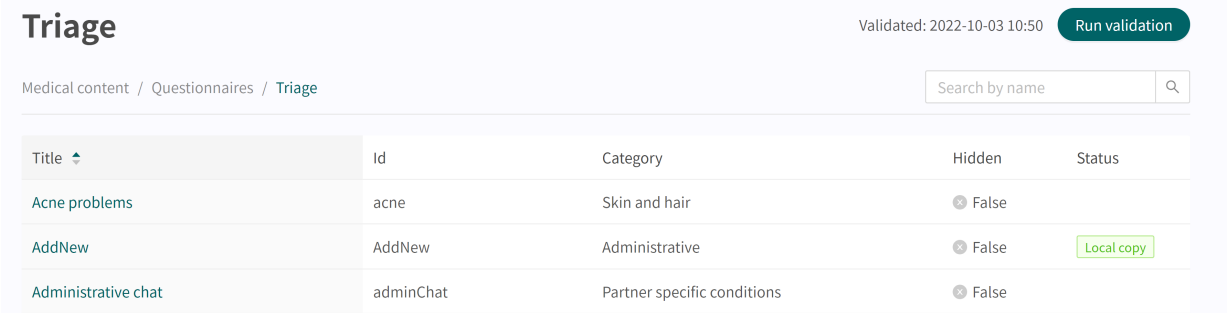
The various sub-menus under the **Medical content** heading contain various questionnaires or self-care information. Select which sub-menu you want to open:

- **Assessments**: Contains questionnaires that can be used to assess conditions for example mood (*MADRS-S*). These can be sent out on a continual basis to the patient, which means that the healthcare practitioner can see trends based on the answers in the assessment questionnaires.
- **Libraries**: Contain questions that are often used in many of the questionnaires in the medical content. The questions are grouped in different Libraries and can be reused in most other questionnaires.
- **Practitioner–initiated**: Not used.
- **Self-care information**: Contains self-care information that can be shown to patients after triage. Existing self-care information cannot be edited but new content can be added and edited.
- **Triage**: Contains the questionnaires patients access from the Patient app by entering different search terms in the search engine.
- **Information articles**: Here you can create information articles that can be viewed in the Patient app. For more information and instructions, refer to the *Smart Care Plans Studio Instructions for Use*.
- **Statistics**: This section provides the possibility to see data and statistics on the outcomes of the questionnaires.

- **Tests**: In this section automatic unit tests are created for the triage questionnaires.

7.3. Overview of questionnaires and self-care information

An overview of the questionnaires or self-care information available in each sub-menu is displayed under each sub-menu (**Libraries**, **Self-care information**, **Practitioner-initiated**, **Assessments**, **Triage**).



Title The column shows the title the questionnaire has been given. This is language-specific and can therefore be available in several languages.

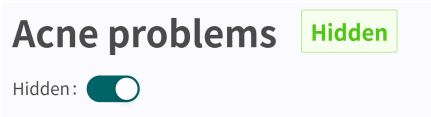
> **NOTE**
> This is not available under the **Self-care information** sub-menu.

Id The `ID` given to the questionnaire/self-care information. It is designated in English as far as possible because it should be viable to use the `ID` throughout the system and to also be the key to the questionnaire in other languages.

Category Specifies in which category the questionnaire is grouped. This is specified when a questionnaire is created.

> **NOTE**
> This is not available under the **Self-care information** sub-menu.

Hidden Specifies if the questionnaire is hidden from patients in the Patient app and hidden for practitioners in Clinic or not. The questionnaire will automatically be created with the value "`False`", which means that the questionnaire is not hidden from patients and practitioners. This can be set for each questionnaire if you click on them.

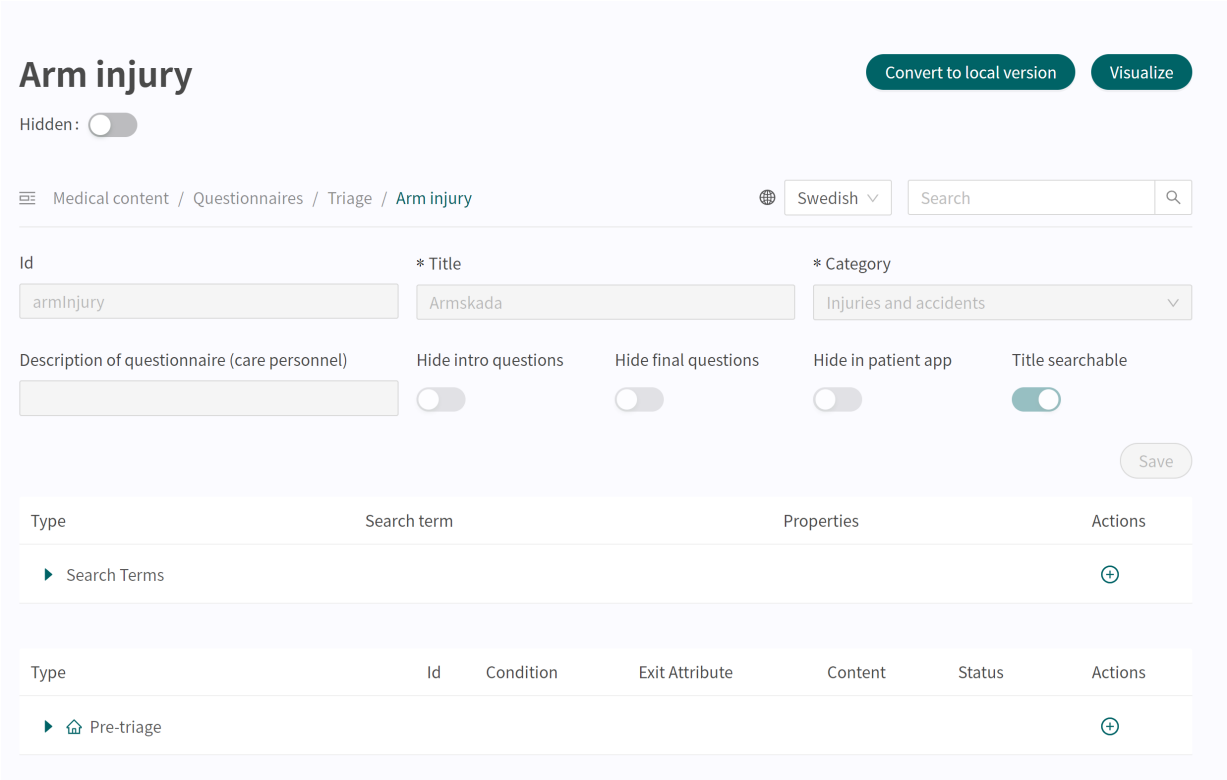


> **NOTE**
> This is not available under the **Self-care information** sub-menu.

Status Questionnaires/self-care information can have three values for this field:
Local copy = questionnaire/self-care information only created once for the customer.
Empty = questionnaire is unchanged compared to Platform24's questionnaire/self-care information.

7.4. Questionnaire details

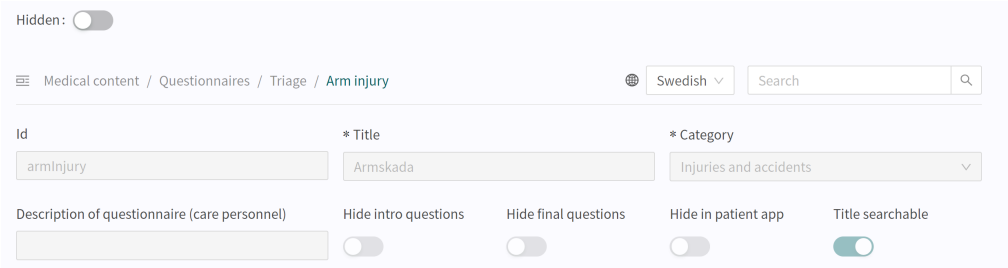
A specific questionnaire can be opened by clicking on it in the overview in the **Triage**, **Assessments**, **Practitioner-initiated** or **Libraries** sub-menus.



The following information is presented in the questionnaire overview.

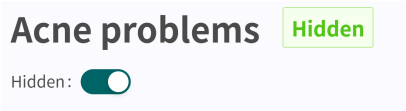
Metadata

Each questionnaire contains a section called **Metadata** with content that can be seen at the top of the questionnaire. **Metadata** is basic information that is used to set basic setting for the questionnaire. Refer to the Metadata section [67] for more information.



Hidden

Specifies if the questionnaire is hidden from patients in the Patient app and hidden for practitioners in Clinic or not. The questionnaire will automatically be created with the value "`False`", which means that the questionnaire is visible to patients and practitioners. This can be set for each questionnaire if you click on them.

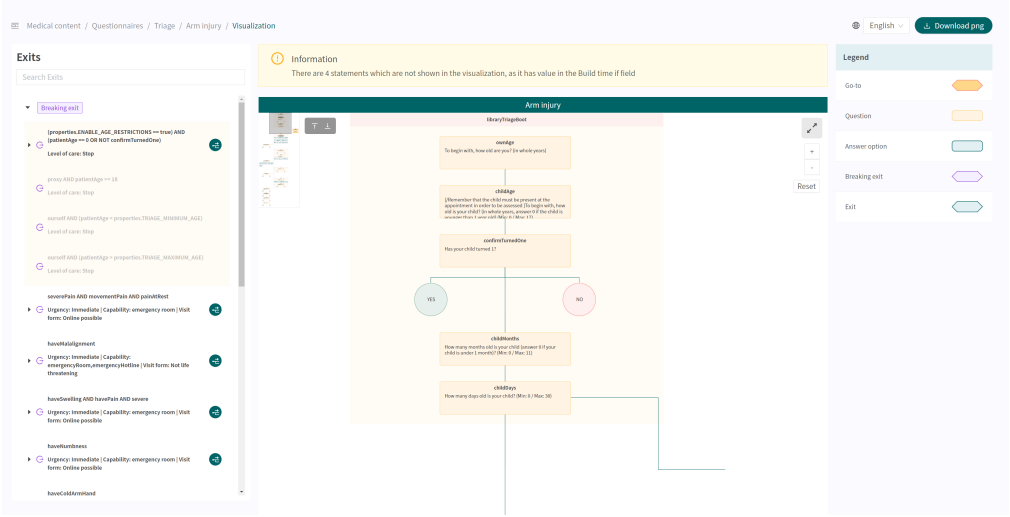


Visualize

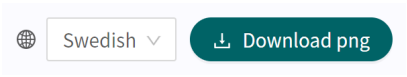
> **WARNING**
> Visualizations do not show components with values in `Build time if`. For this reason, do not only use the visualizations to understand the structure of the questionnaires.
>
> Recommended use together with the basic view for questionnaires to obtain an overall understanding.

It is possible in each questionnaire to visualize what the questionnaire looks like with each of its components (e.g. `Questions`, `Exits`, `Includes`, etc.).

Click the **Visualize** button to open the interactive visualization.



You can click on "**Download png**" to download the file and view it locally. It is also possible to change the language in the content (if the customer has questionnaires in several languages).

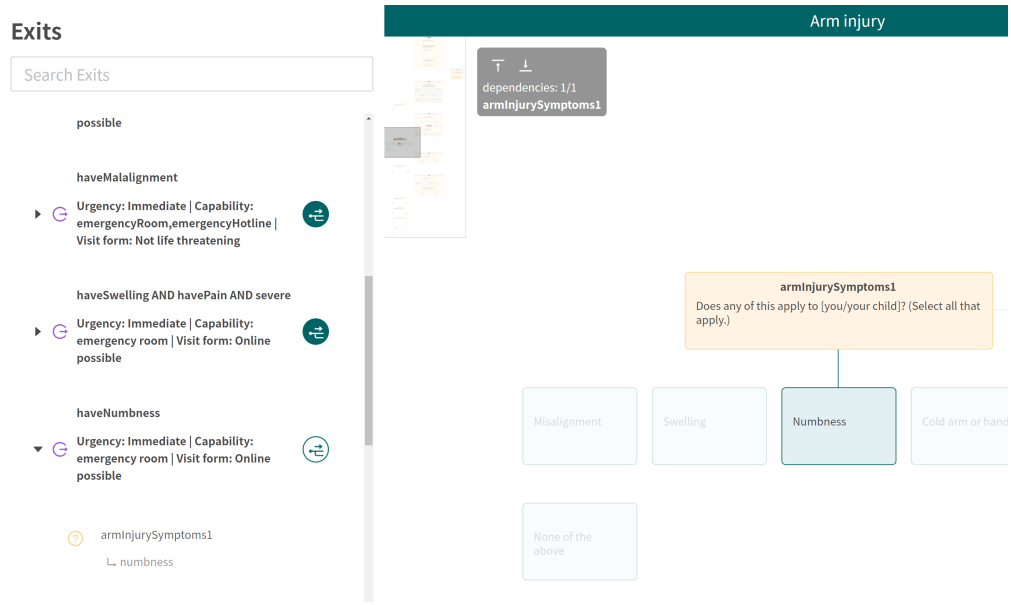


Scrolling allows you to zoom in and out in the visualization. Click and drag to move the window. Click on the expand symbol to maximize and enlarge the visualization in the window.

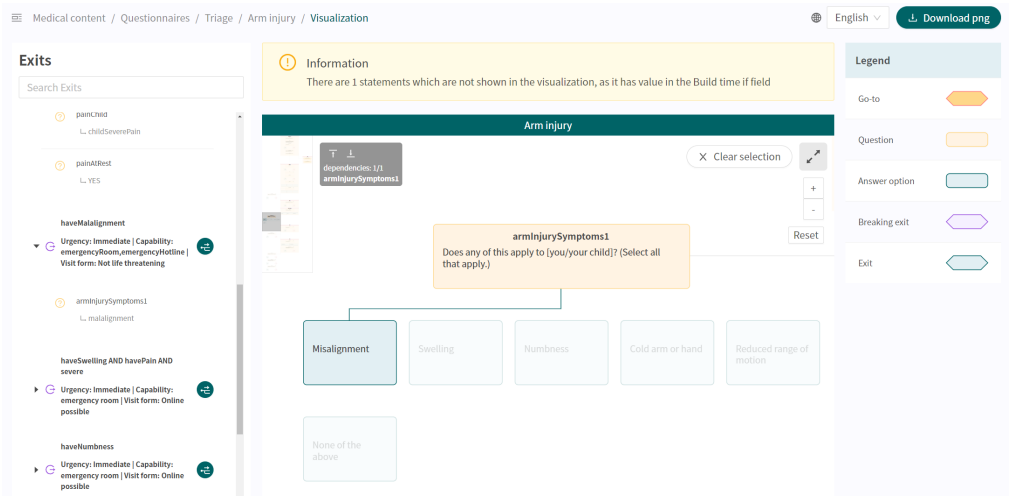


Clicking on a component in the visualization area displays the dependencies and conditions for the specific component. For example, a prior affirmative answer to

a question may be required in order for this specific question to be activated for the patient.

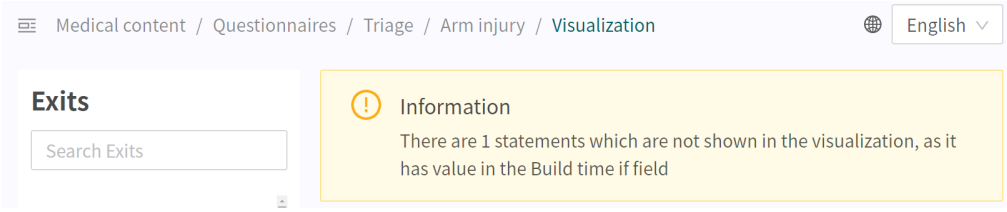


All exits are displayed in the **Exit** list to the left. It is possible to search for content in exits and click on the exits that have a green symbol to their right. An exit can be expanded by clicking on it. By either clicking on the green symbol or on one of the dependencies below, the dependency will be visualized and displayed on the screen. You can click between the dependencies under the exit. This is a way to easily obtain an overview of what conditions are required to activate an exit for the patient.



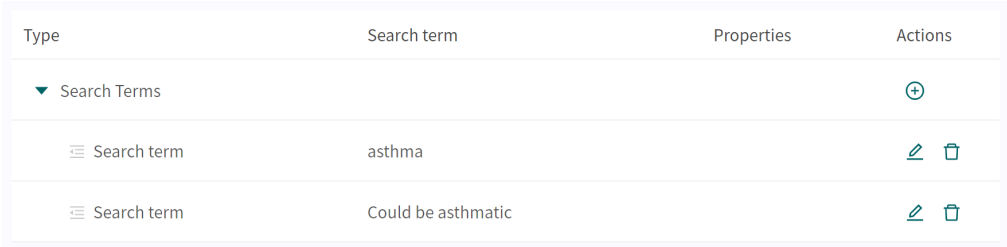
When a change is made to the questionnaire, the visualization will be updated, making it a good tool for determining changes and to be used as part of the validation before changes are released into production.

> **NOTE**
> The visualizations do not show components with values in `Build time if`.
>
> To warn the user, if there are components that are missing in the visualization, an information box is displayed above the visualization. See image below for examples. Therefore, use the original questionnaire view along with the visualizations to obtain a complete picture of the questionnaires and possible patient journeys



Search terms

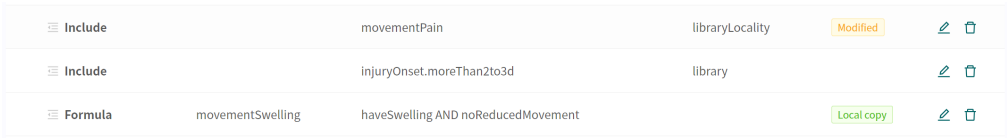
Section where search terms linked to the questionnaire are compiled. Click on the arrow to expand the section to view all search terms. Refer to the Search terms [69] section for further information.



Status

Questionnaire components can have three values in the status field.

- **Local copy** = component only created for the customer.
- **Empty** = component has not been changed compared to Platform24's version.

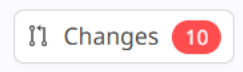


7.5. Change management and tracking

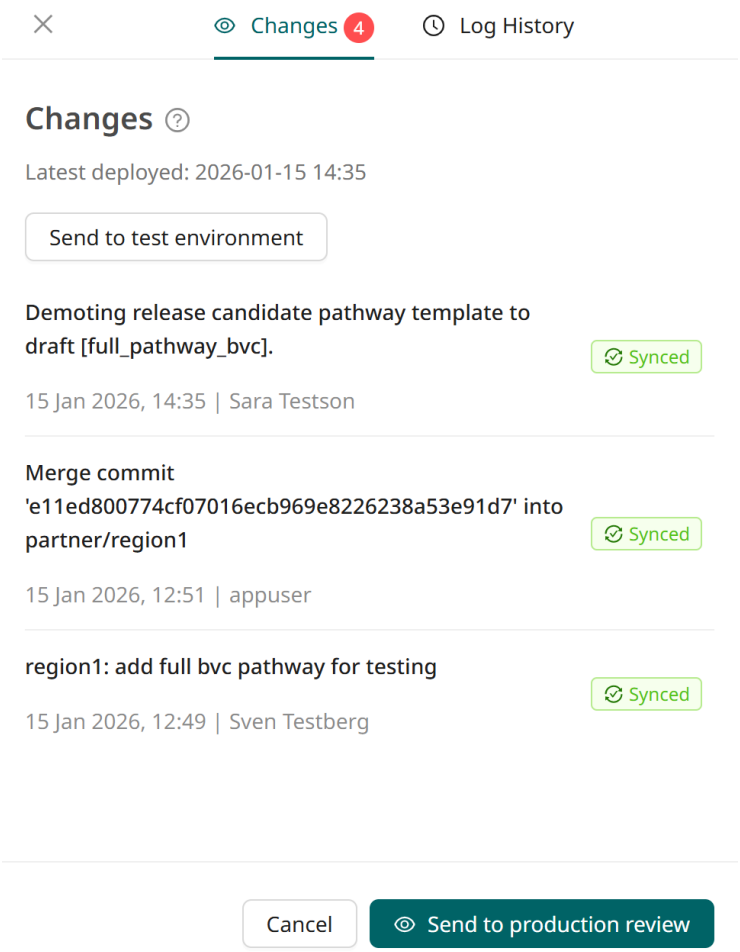
> **NOTE**
> These instructions only apply to changes that concerns:
>
> - All changes made in the *Medical content* section accessed from the main menu, see Access to Content Studio+ [20].
> - Certain care unit and patient app settings, refer to the *Manage Instructions for Use* for more information and instructions.

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

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



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



Changes

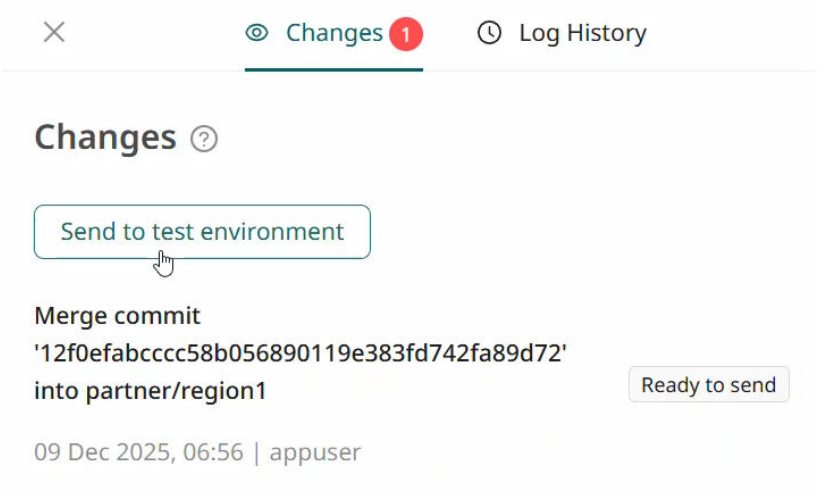
Any changes made since the last production release and that are waiting to be released to production will be displayed in the **Changes** list. The **Changes** list displays what the change was, who made the change, date and time and whether the change has been saved correctly. The number of changes is displayed in the red circle.

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

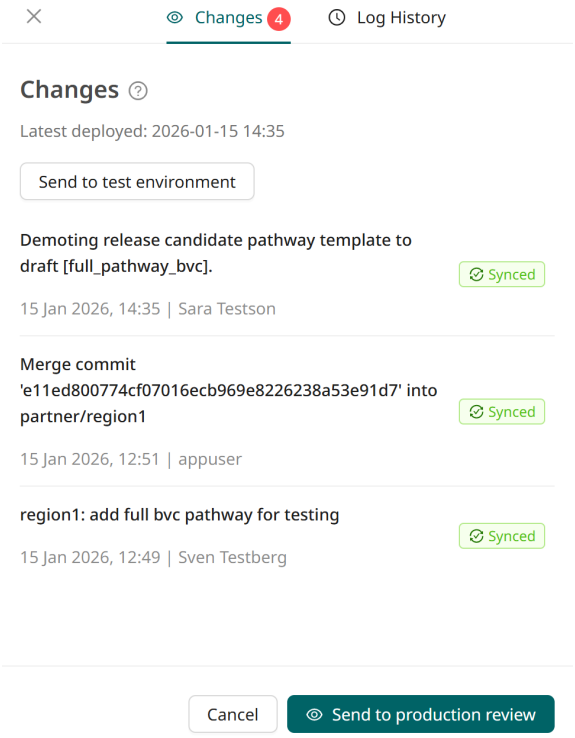
Send to test environment

New changes that can be sent to the demo environment have a "`Ready to send`" status in the **Changes** list. All changes that

have been added since the last update to the demo environment will be sent when clicking the **Send to test environment** button.



After sending the changes to the test environment, the most recent changes in the **Changes** list are given a status. The status "Synced" informs that the change has been successfully uploaded to the test environment (includes both the Patient app and Clinic). It is always the most recent change that is valid (displayed at the top). If the top one has been synced, all the underlying ones have also been saved correctly.



`Failed` is a status that will be shown instantly (without sending to the test environment) indicating that the change could not be made. This also means that the change is not in the queue for production release. If "`Failed`" is displayed for the three most recent changes, contact the Platform24 Support for further help.

Send to production review

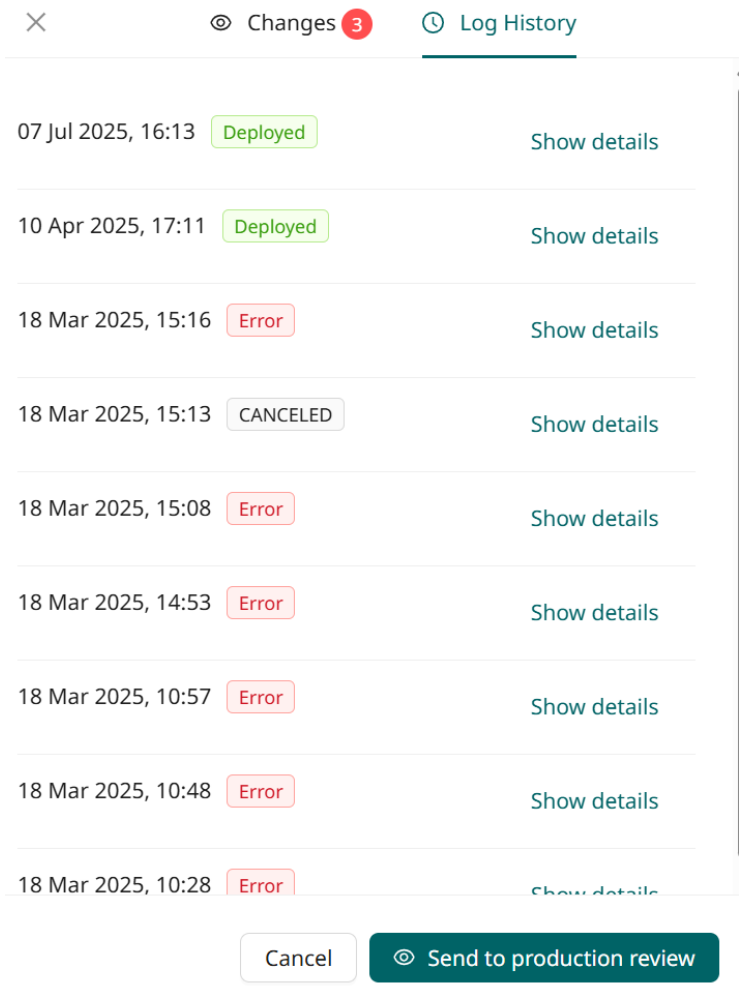
In addition to the customer's own validation- and test processes in the demo environment, a technical review by Platform24 is re-

quired before the changes are released into production. For more information, see Sending changes for technical review before release to production [28].

> **IMPORTANT**
> Before using the **Send to production review** button, your organization needs to be in contact with Platform24 to get approval to use this in your workflow. Platform24 will then set up a process for how to release the changes together with your organization.

Log history

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

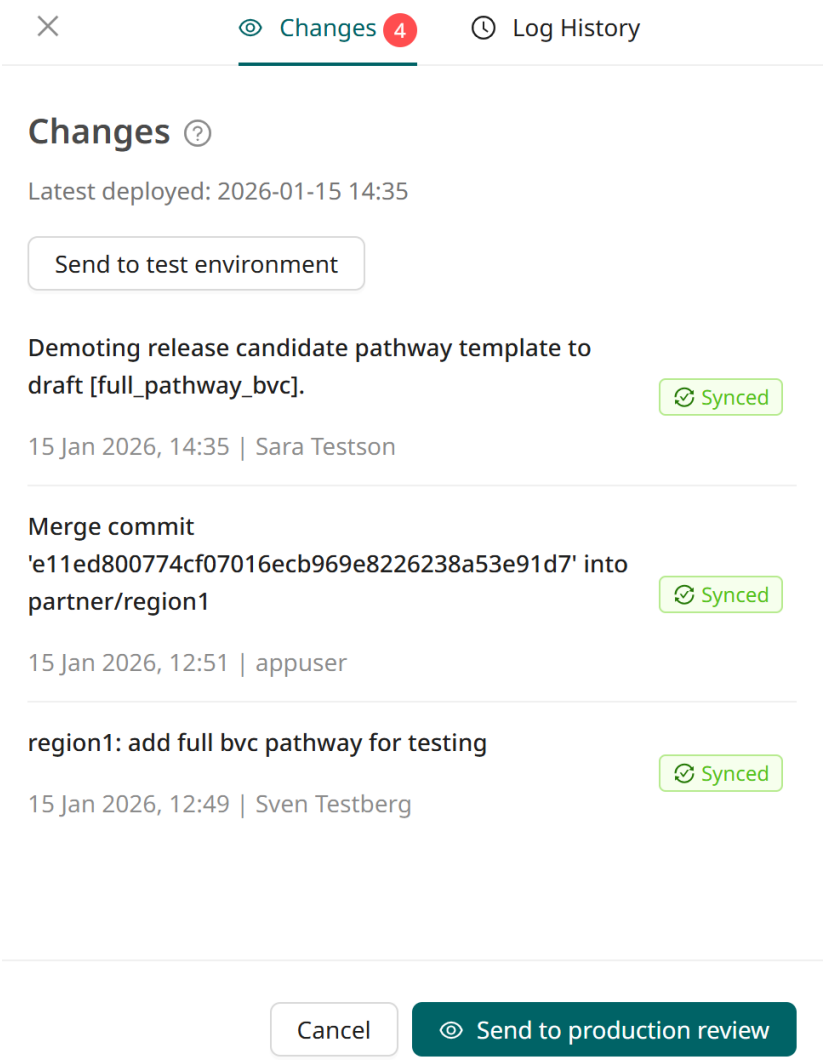


7.5.1. Sending changes for technical review before release to production

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

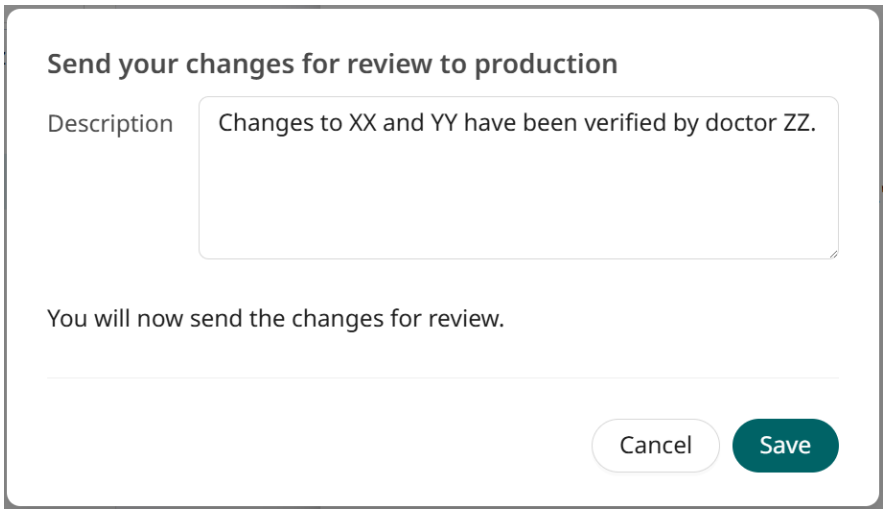
To send the changes for technical review before release to production:

1. Click on the **Send to production review** button.

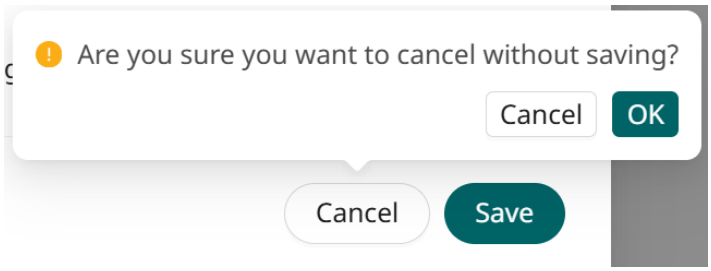


IMPORTANT
Before using the **Send to production review** button, your organization needs to be in contact with Platform24 to get approval to use this in your workflow. Platform24 will then set up a process for how to release the changes together with your organization.

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



3. You can cancel the request without saving by clicking **Cancel**, if for example a review of additional changes needs to be carried out.



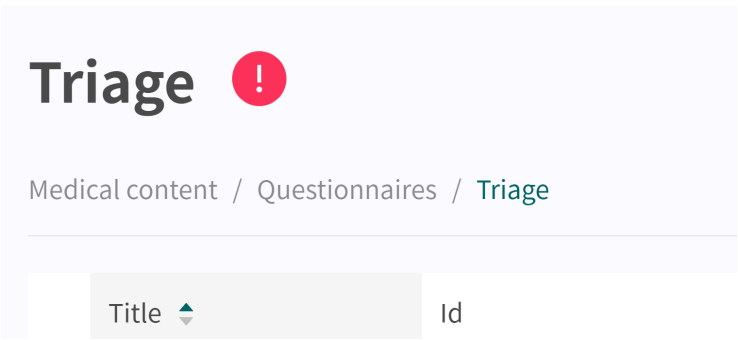
4. To send the request, click **Save**.
   When the technical review has been completed and it has passed, the changes will be released to production.

7.6. Warnings

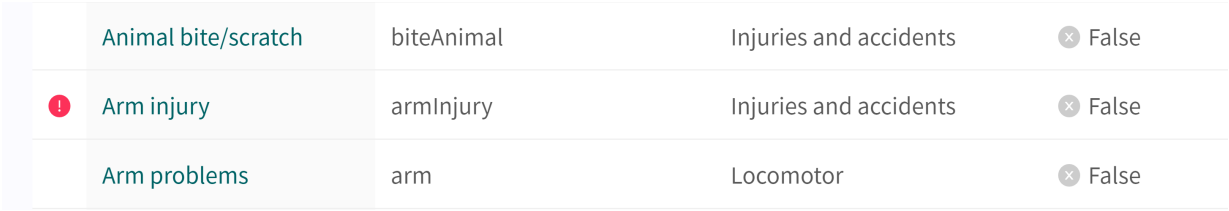
7.6.1. Overall warnings

A red exclamation mark will appear next to the questionnaire title, if any changes have been made to the questionnaire which interrupt the logic. The exclamation mark will appear in the list showing all the questionnaires and at the specific component where the logic is interrupted. Information about the specific error is shown if you place the mouse pointer over the exclamation mark. This can for example be specifying an incorrect condition that does not exist. The images below show all views where the exclamation mark is shown

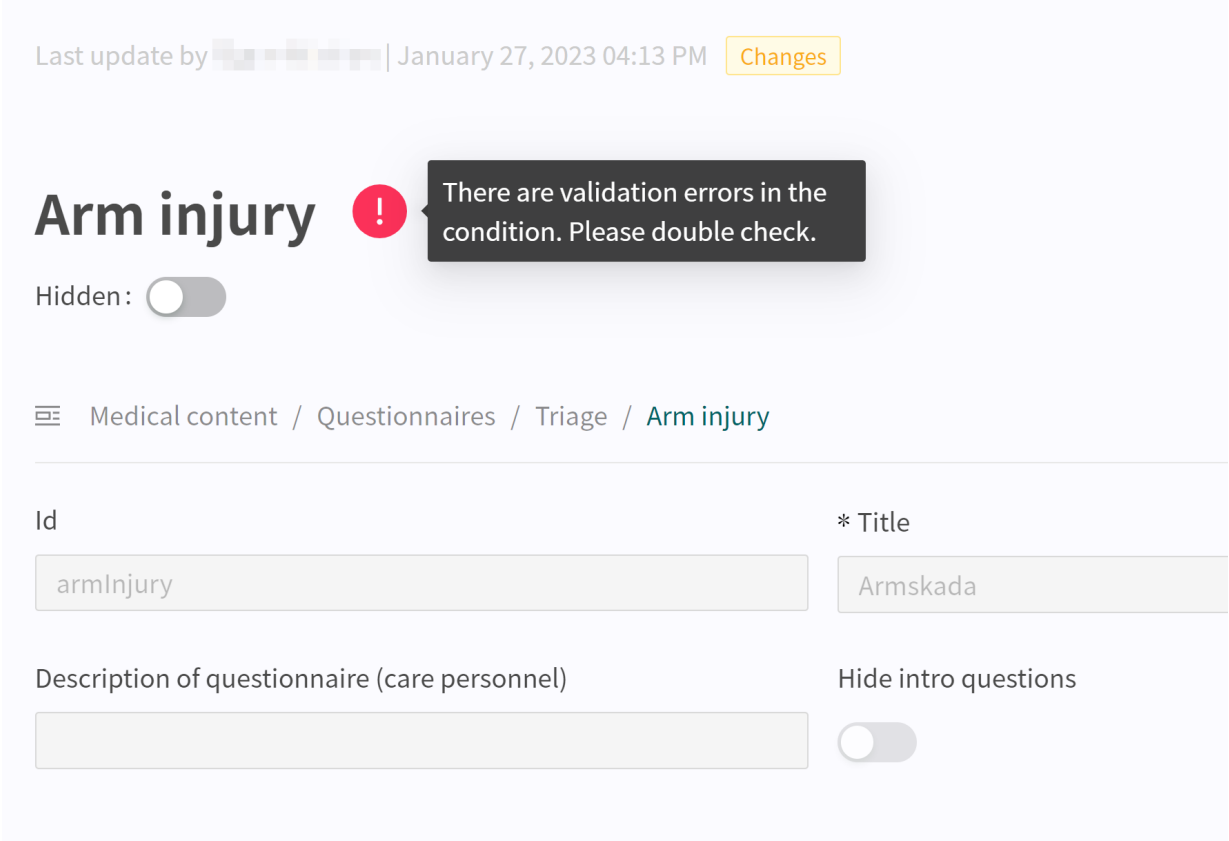
The image below shows the exclamation mark warning in the **Triage** view.



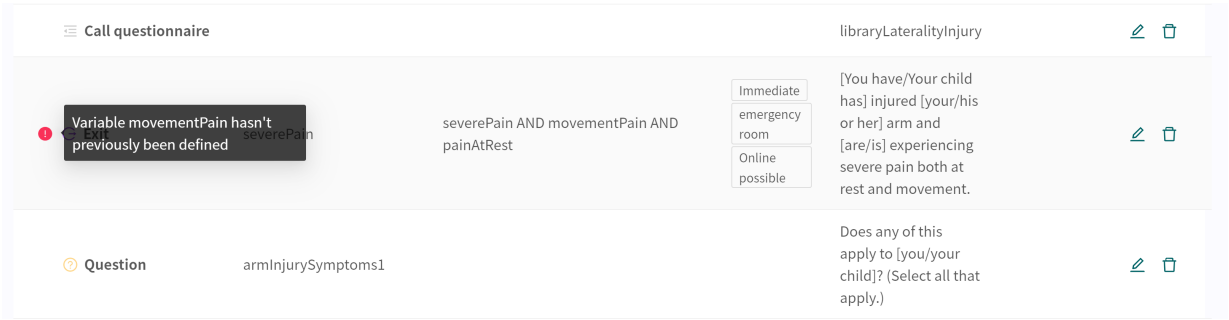
The image below shows the exclamation mark at the questionnaire where the logic is interrupted.



The image below shows the exclamation mark within a specific questionnaire.



The image below shows the exclamation mark at the specific component where the logic is interrupted.



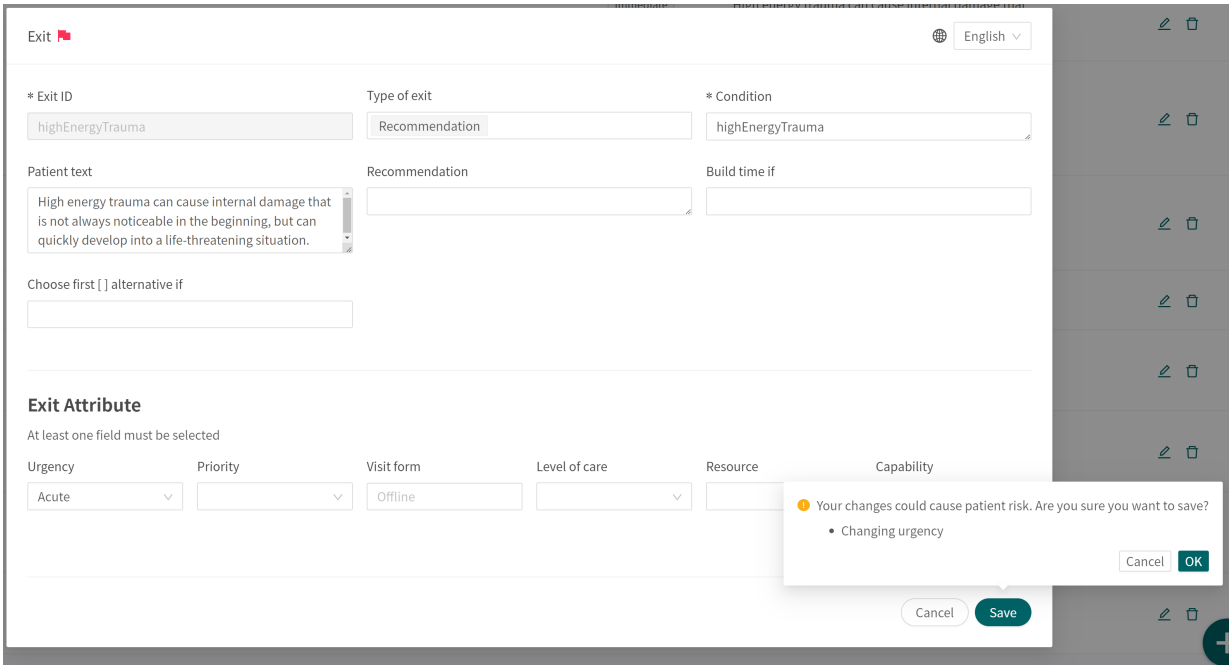
To ensure the questionnaire does not contain any broken logic, always make sure that the questionnaire has no red exclamation marks and conduct thorough tests in the Patient app to rule out

errors and patient risks. To trigger a new validation, press on the button “**Run Validation**”. “**Run Validation**" is done in the **Triage** view and starts a validation of all questionnaires.



7.6.2. Warning in the event of changes

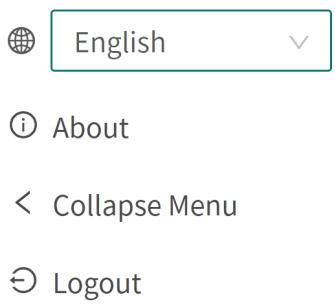
If changes are made to conditions in the components’ exits and formulas as well as to urgency levels in exits, a warning message is displayed when saving the change. This is to remind users that any changes have been made may result in a risk for patients. The warning appears each time changes have been made to the conditions and urgency levels in each component.



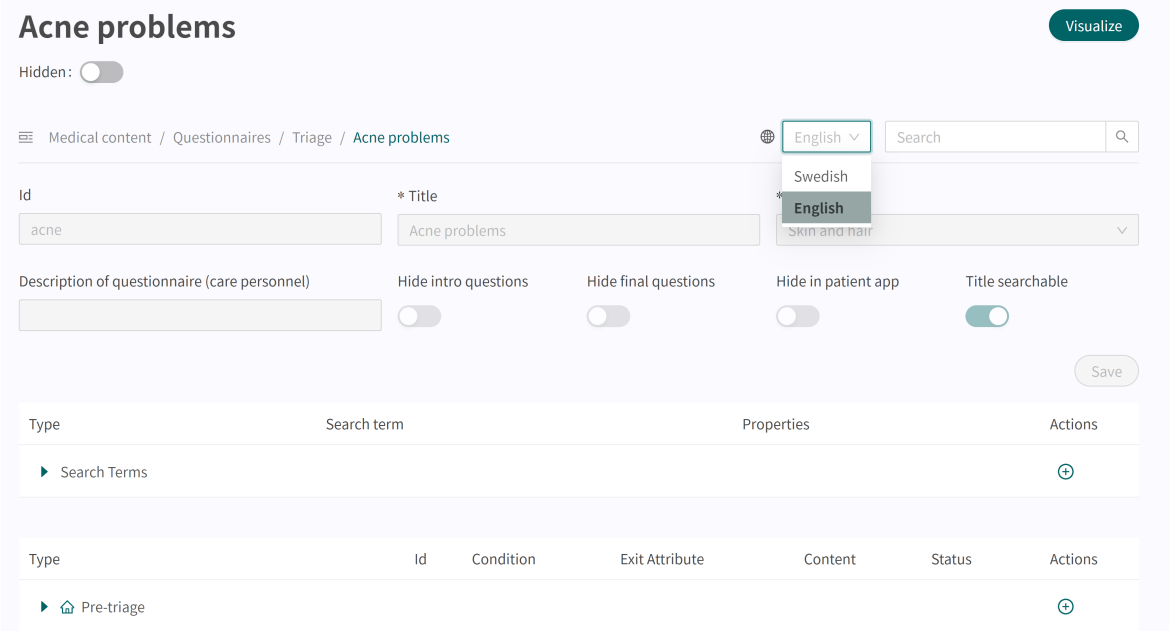
7.7. Languages

Questionnaires can be created and provided to a patient in several different languages. The languages agreed on to use in Platform24 will be displayed and selectable for the various Content Studio+ components.

1. Start by selecting which language to use in Manage in the lower left corner.

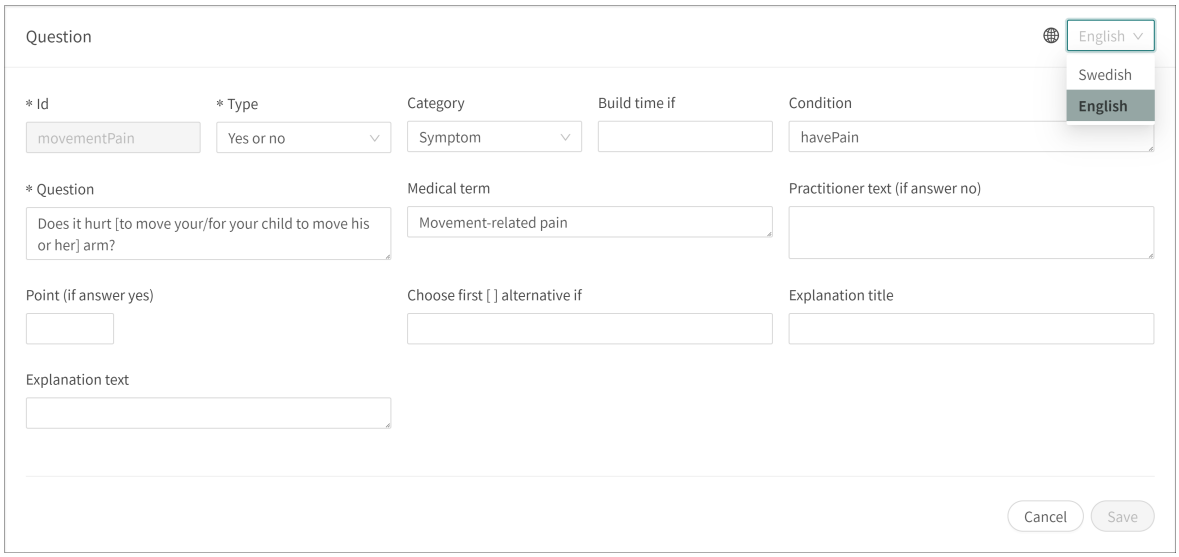


2. To edit a questionnaire in another language, select the language in the overview to change the language in language-dependent fields (e.g. the field **Description**).



3. To change the language in a component, for example when editing a **Question**, click on the field and select the language in which the text should be displayed.

> **NOTE**
> The application texts will be displayed in the languages selected in step 1, but the **Question** content will be displayed in the selected language in this step.



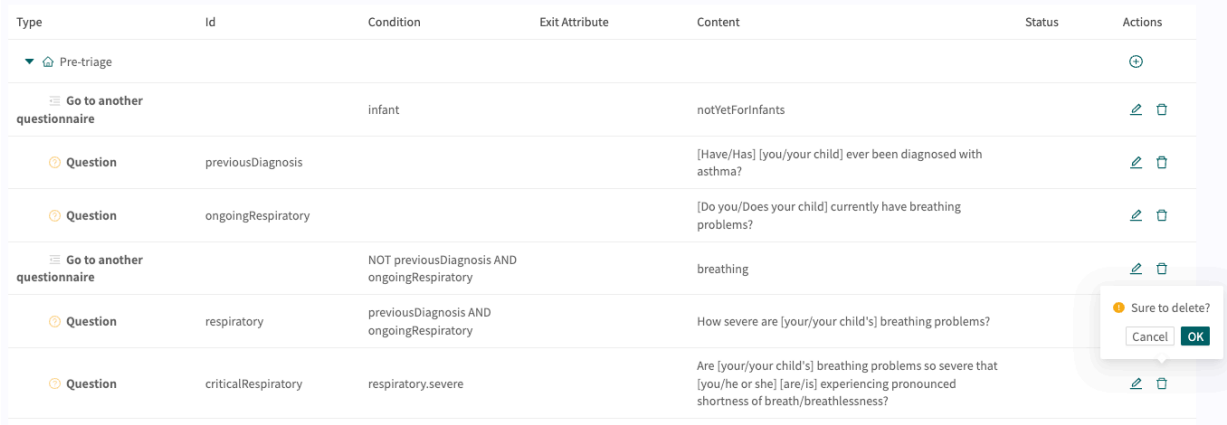
7.8. Deleting and undoing component changes

Questionnaires cannot be completely deleted. They can however be deactivated in the Patient app and in Clinic by setting them to "**Hidden**" (refer to the Overview [21] section for more information) or "**Hide in patient app**" (refer to Metadata [22] section for more information).

7.8.1. Deleting and recalling components

WARNING
Removing a component can pose a patient-safety risk unless a careful analysis of the effects is performed. Make sure to test any changes made and identify any ensuing changes required to ensure patient-safe flows.

The components (e.g., questions, exits, formulas, etc.) in a questionnaire can be deleted/removed to adapt the questionnaire to a customer's operations. Click on the “**Rubbish bin**" icon next to the "**Pen**" icon to delete a component.



8. Grouping and using questionnaires and self-care information

8.1. Assessments

Assessments are codified rating scales such as **MADRS-S**, **Dudit** and **Audit**. The assessments always have the category: **Assessments** and are sent from Clinic to the patient.

These questionnaires have no triage exits but contain questions where the answers are rated according to international or national standards. The system totals the user's points, which in turn in its clinical context provides a subset of information about the patient's current wellbeing to healthcare practitioners in Clinic.

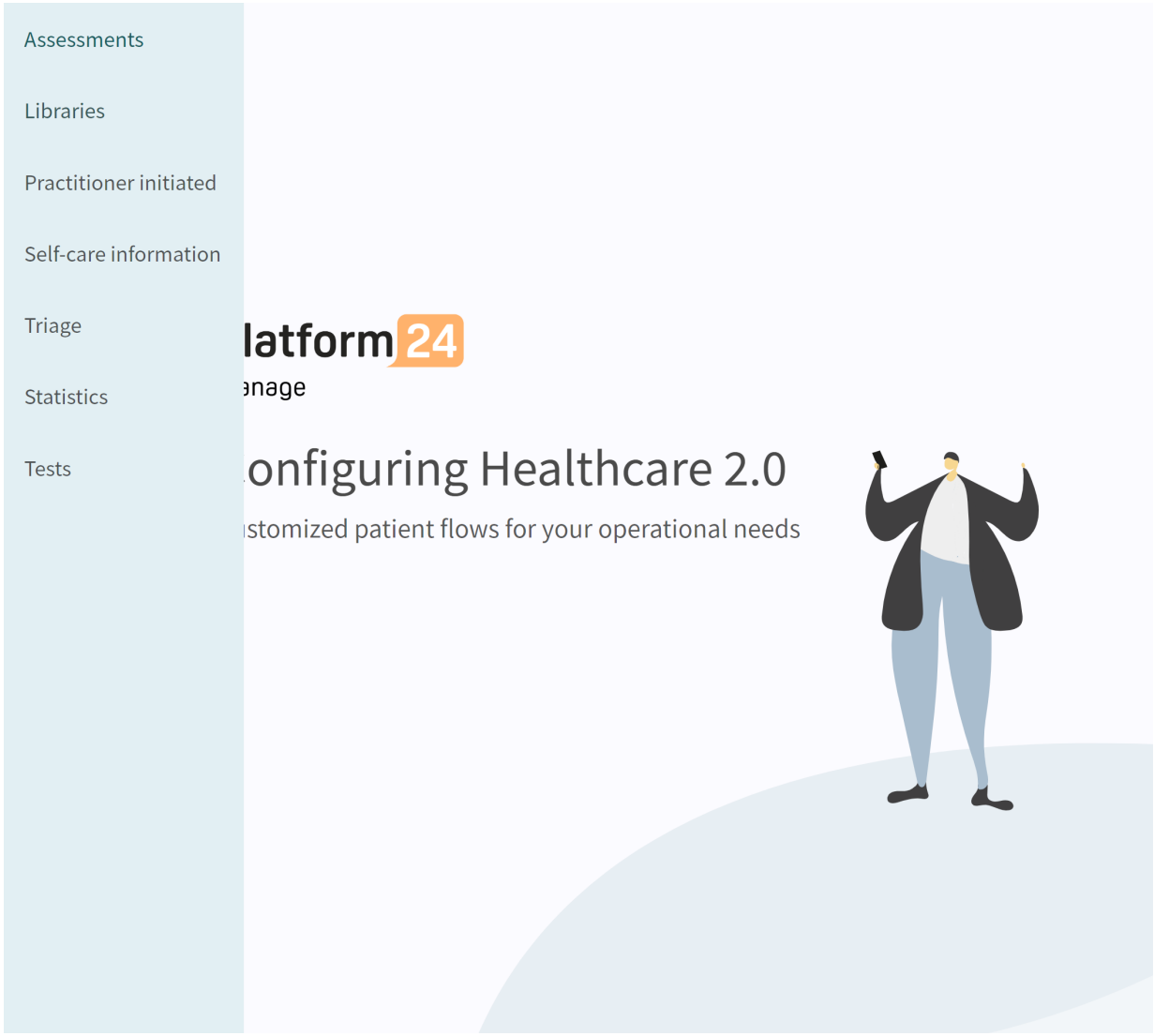
It is possible to use assessments that patients can search for in the patient app. These have to be coded as a regular assessment in the **Triage** or **Library** sub-menu. The system enables conditions to be set for the triage exits based on the total points from such an assessment or library.

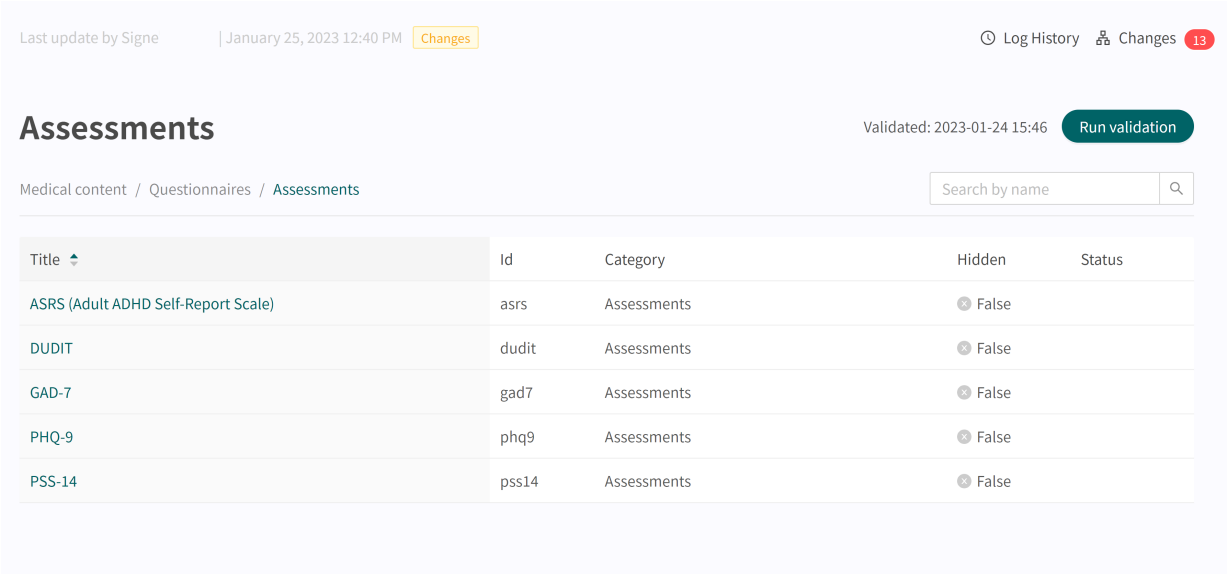


WARNING
Editing and adding assessments can pose a patient safety risk unless a careful analysis of the effects is conducted. Make sure to test any changes made and identify any ensuing changes required to ensure patient-safe flows.

8.1.1. Editing existing questionnaires

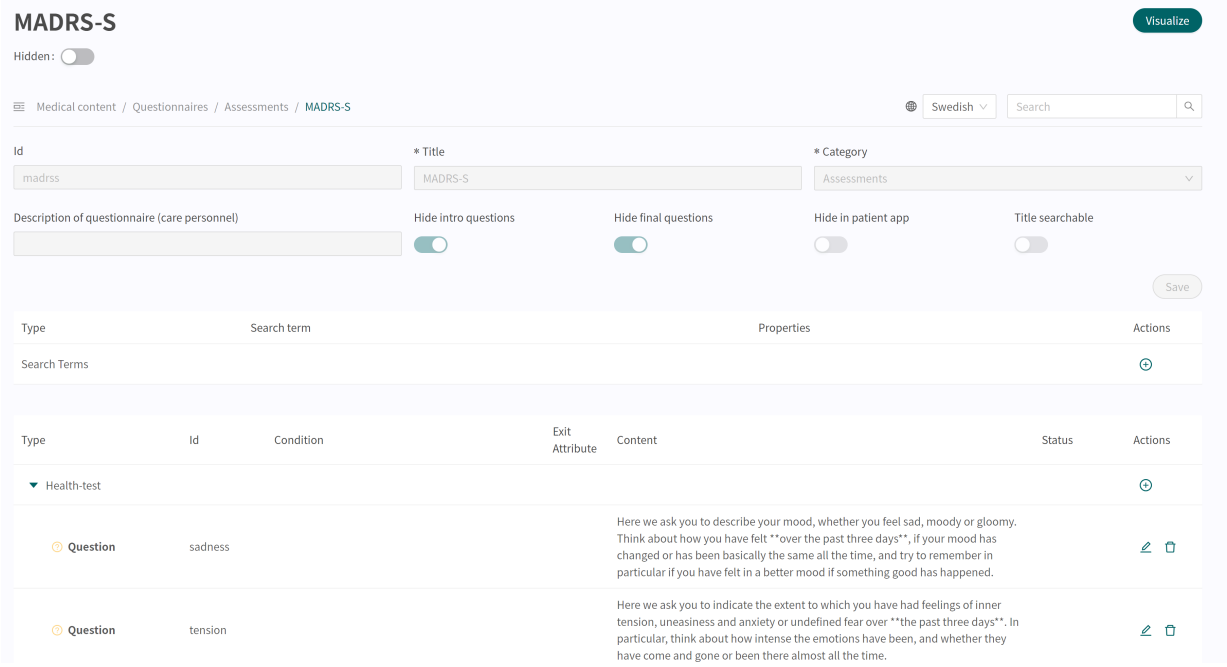
To edit an existing assessment, click on the "**Assessment**" sub-menu under the "**Medical content**" menu. Then select the assessment you want to edit. Existing assessments in the status column are not selected.





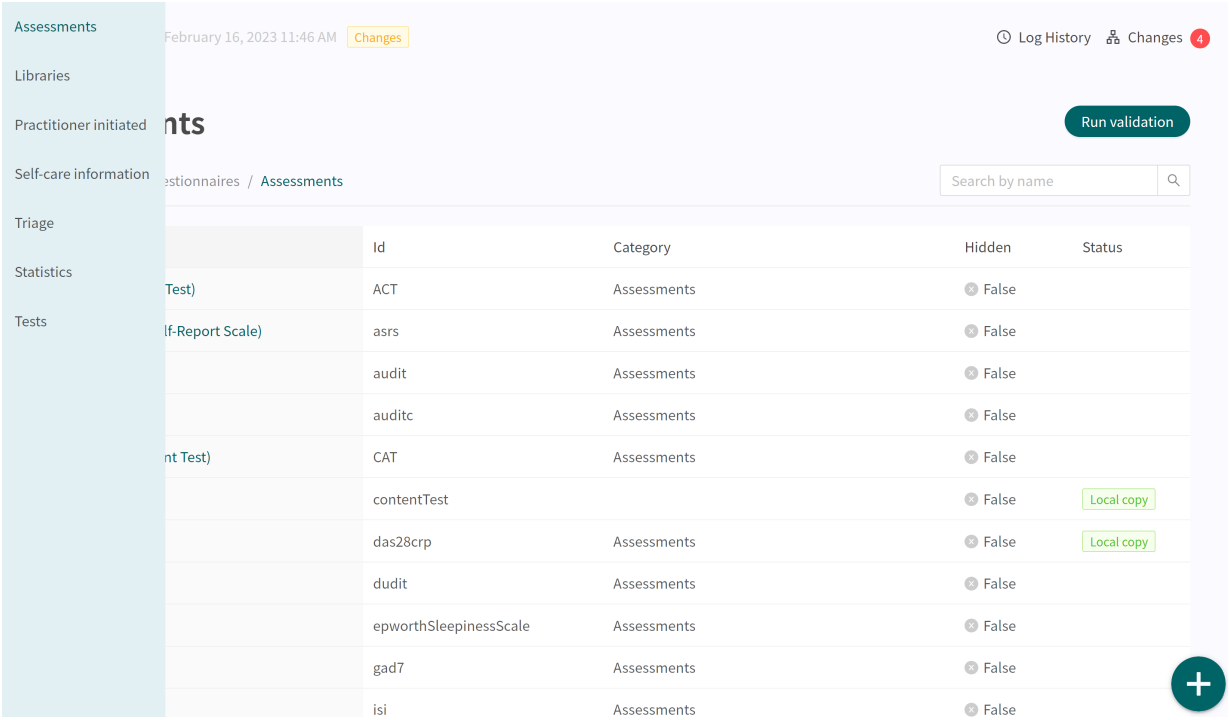
Click on the questionnaire to be edited (click on the title that is displayed in the "**Questionnaire**" column).

Assessments always have the "**Assessment**" category and always have the "**Health test**" section where the components are available. Click the plus ⊕ icon to add a new component to the section or click the **pen** for a component to edit the existing component. It is not possible to add **Flags**, **Exits** or **Go to another questionnaire** as the assessments are always sent out from Clinic (healthcare practitioner view) and do not then require the above-mentioned components.



8.1.2. Creating new questionnaires

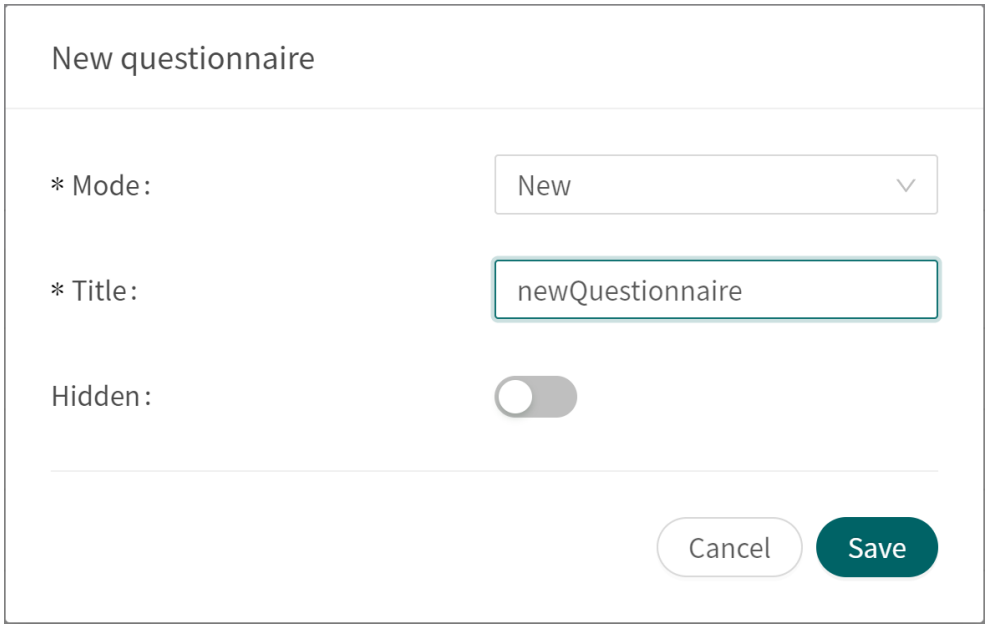
New assessments, which can be sent to patients during an appointment, are created in the “**Assessments**” section under the "**Medical content**” menu option.



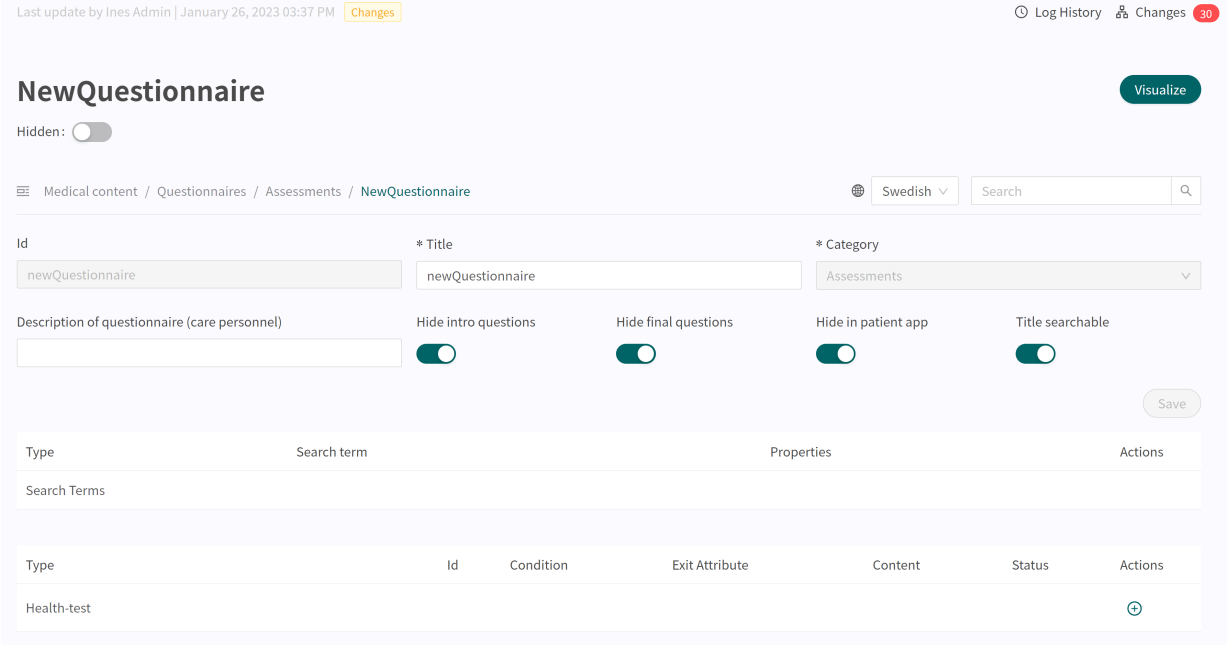
Click the plus sign ⊕ in the lower right corner to add a new assessment. In the window that opens, enter a name for the new questionnaire according to valid values:

a-z, A-Z, 0-9 (a-z uppercase and lowercase letters and numbers, no special characters).

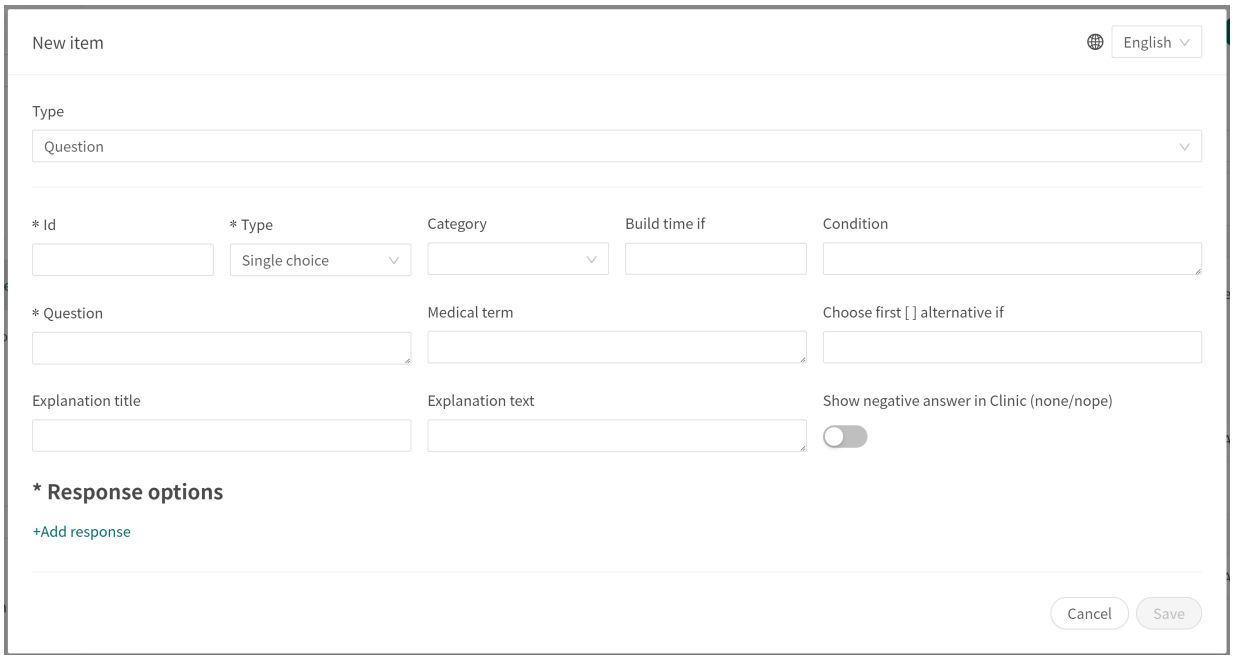
Click on ”**Save**”. The questionnaire will automatically be set to hidden in the Patient app (**Hide in patient app** slider selected).



When the questionnaire has been created, fill in a description of what the questionnaire contains in the **Description** field. Click again on the ”**Save**” button. Then click on the plus button ⊕ to add statements to the ”**Health test**” section.

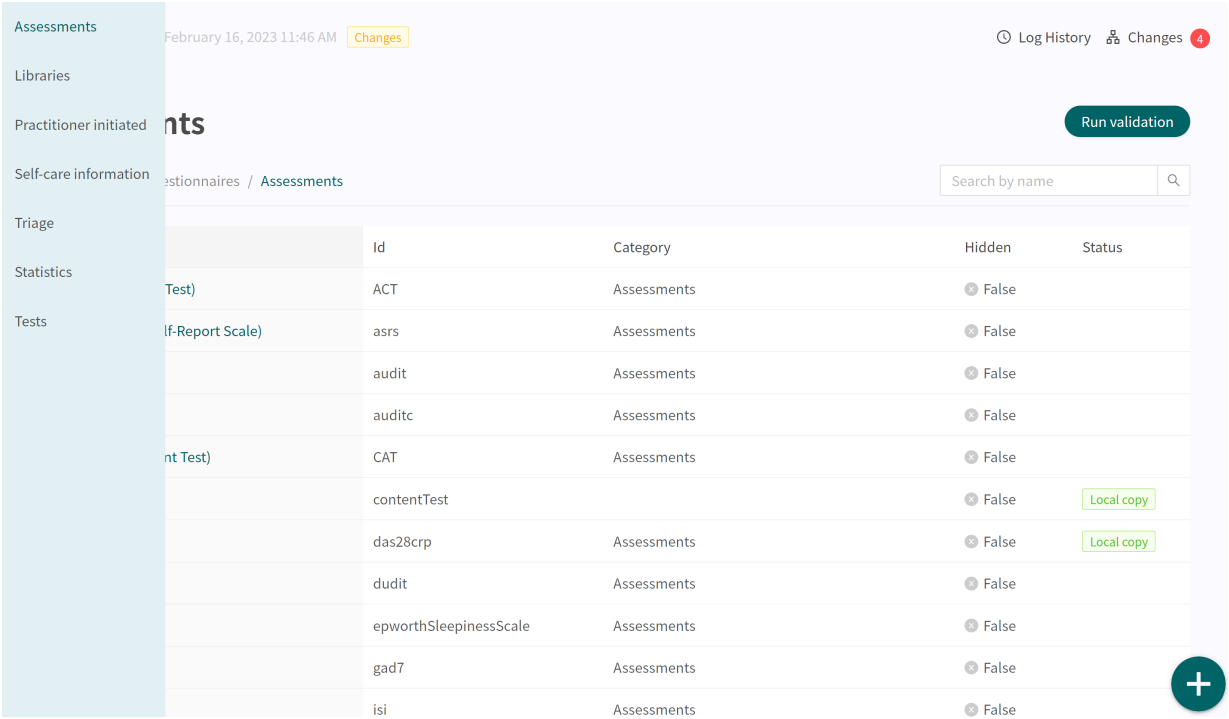


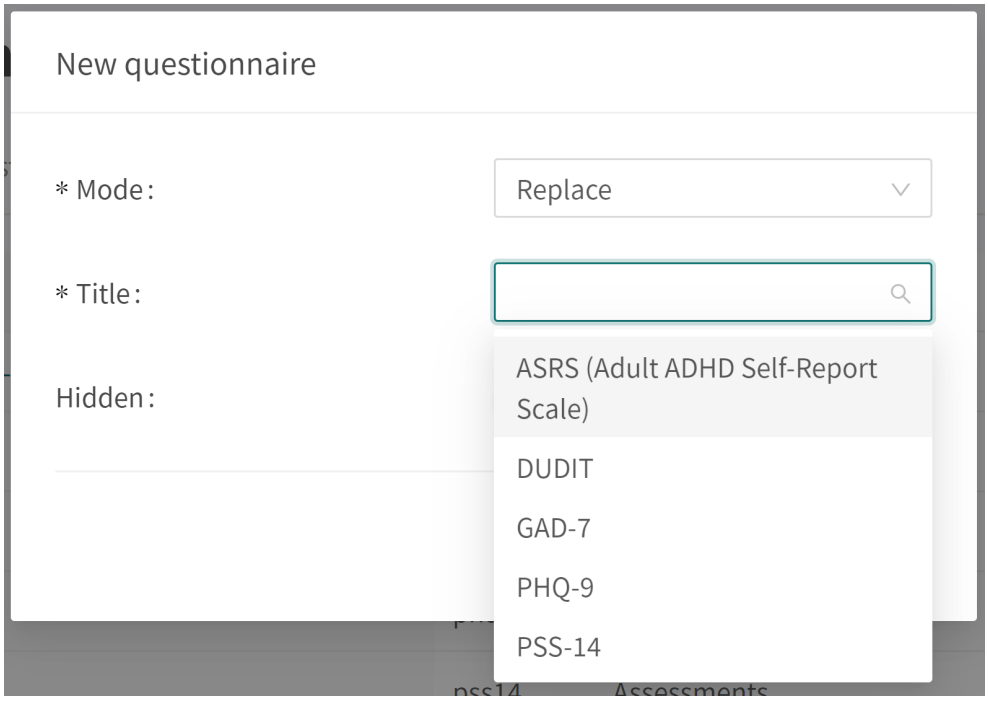
Components are added to the "**Health test**” section by clicking on the plus ⊕ sign in the "**Health test**” row and selecting which component type to add in the window that opens. Standard components in **Assessments** are "**Questions**".



8.1.3. Replacing existing questionnaires

To replace an existing questionnaire, go to the questionnaire overview in the **Assessments** section and click on the large plus ⊕ sign in the lower right corner.





Select "**Replace**" in the **Mode** field and which of the existing questionnaires you want to replace in the **Name** field. It is only possible to replace existing questionnaires, meaning that any questionnaires without changes will not be displayed in the list. If a questionnaire must be replaced, delete all changes and then carry out the above steps again. When a questionnaire is replaced, it's **Id** and components are reused and this opens the way to also edit the questionnaire's metadata.

Replaced questionnaires can be edited just like New questionnaires. Refer to the Creating new questionnaires [38].

8.2. Libraries

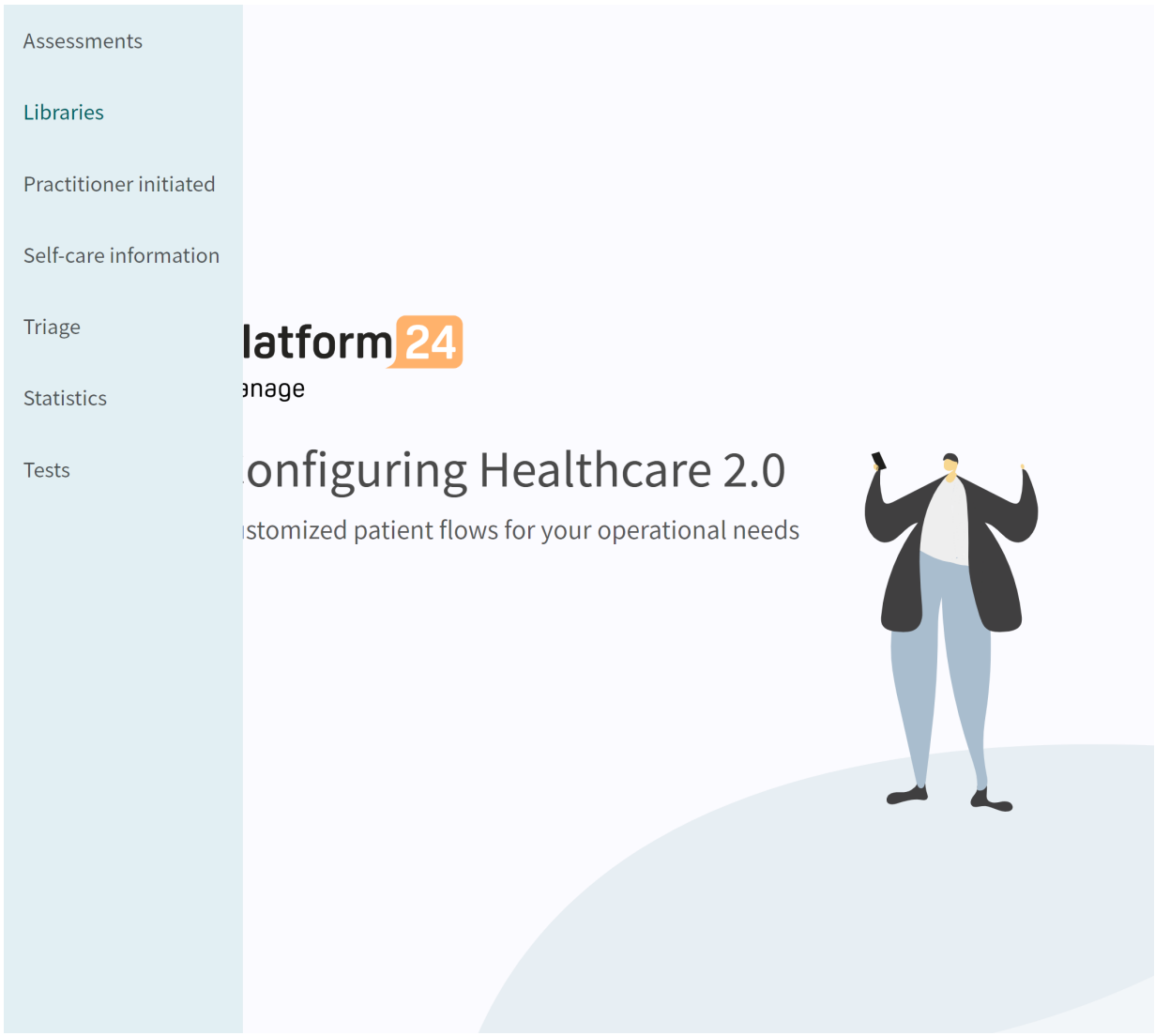
Libraries contain questionnaire components that are often used and which can be reused in many of the questionnaires in the medical content. These are grouped in different **Libraries**.

> **WARNING**
> If a change is made in a **Library**, the change will affect all questionnaires where the **Library** is used. Consider therefore carefully when editing.

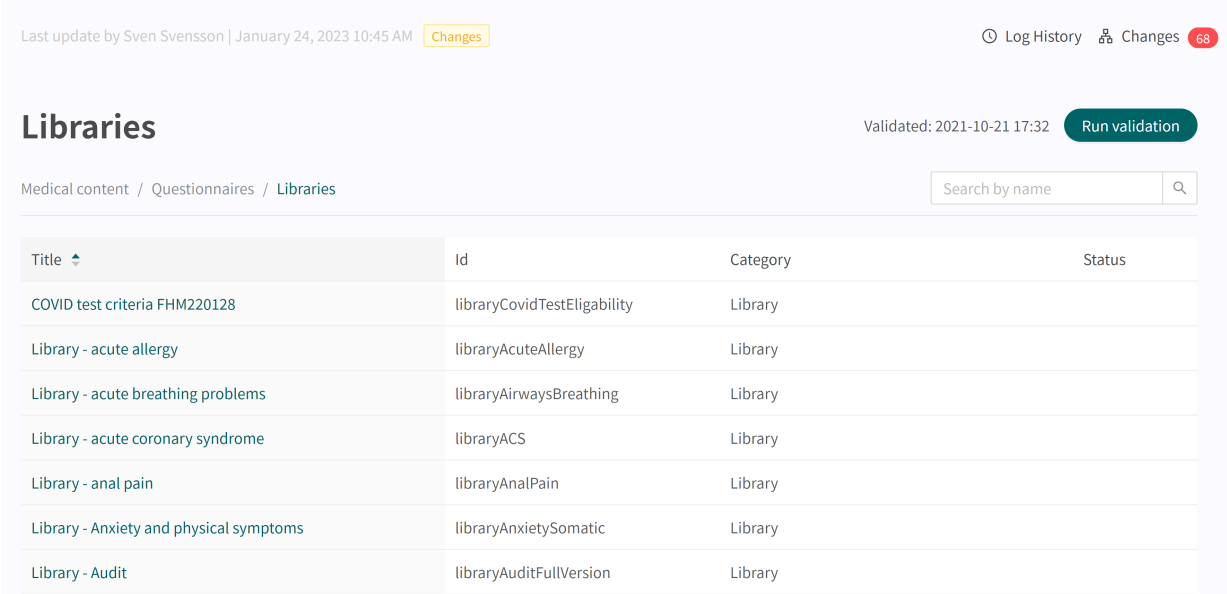
8.2.1. Editing existing libraries

In the existing medical content, there are pre-defined libraries that are used in the medical content questionnaires. It is possible to edit the existing libraries, but be aware that many of the existing libraries and their contents are already used in questionnaires in this solution, and if a library is changed, this will also affect any questionnaires that use that particular library.

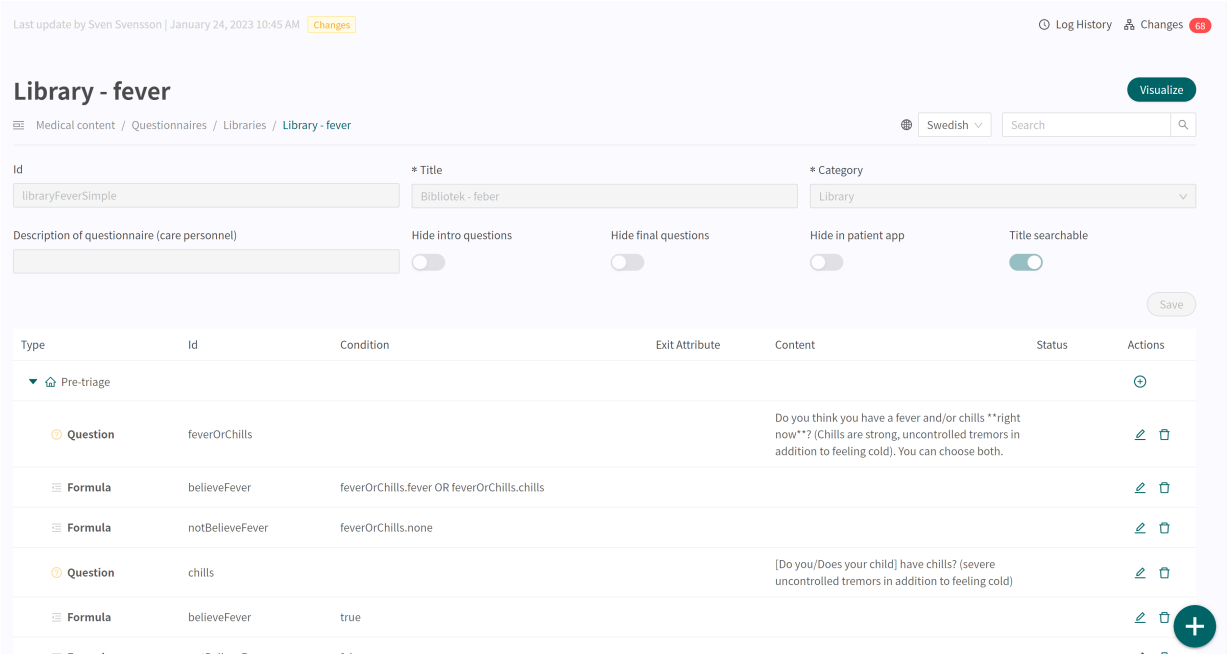
To access **Libraries**, move the cursor over "**Medical content**" and click on the “**Libraries**” menu option.



Search for the libraries to be edited and/or click on the libraries to be edited. Each library is displayed with its title (under the **Title** column), **Id** and **Category**. All libraries have the **Library** category.



In the existing questionnaire, the existing components can be edited by clicking on the **pen** to the right of each component. Click on the plus in the section (in this case **Pre-triage**) to add additional components and select which component to add.

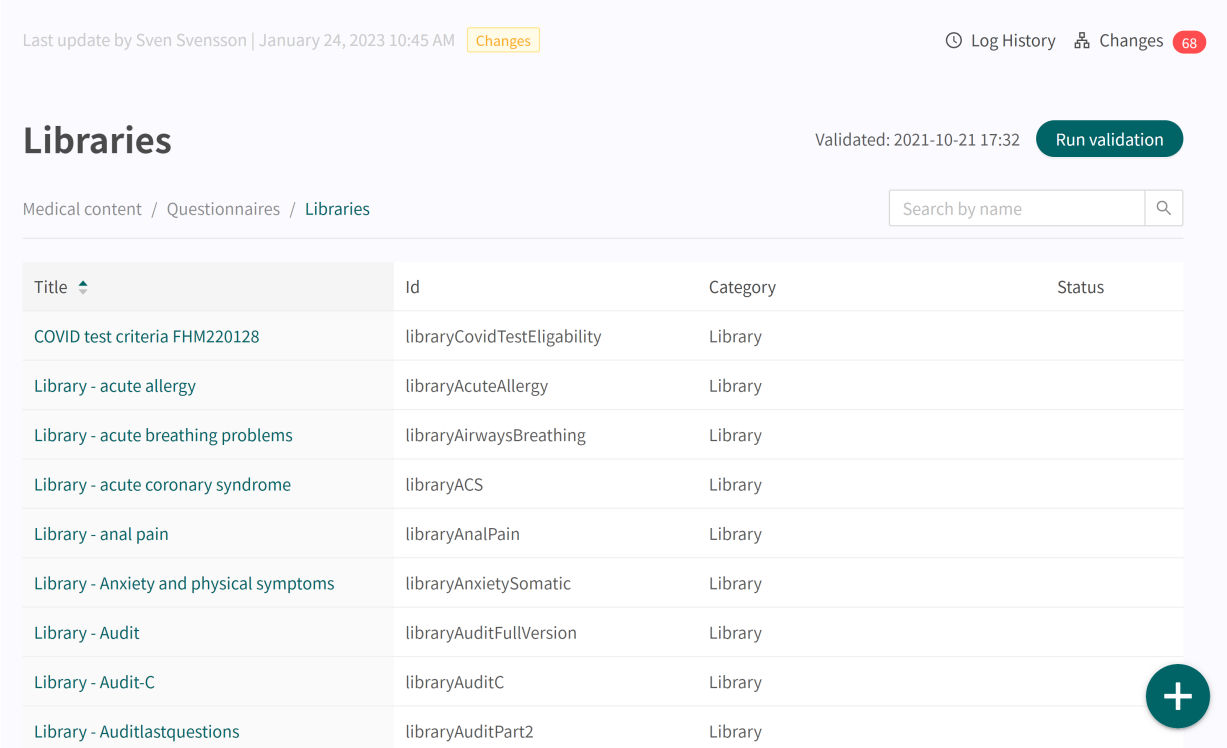


When editing existing libraries, it is not possible to edit a questionnaire's basic information (meta-data [67]).

If users wish to edit metadata (for example, the description of the library), refer to the Replacing Existing Libraries [47] section.

8.2.2. Creating new libraries

To create a new library, go to the **Libraries** section under the "**Medical content**" menu and click on the plus ⊕ icon in the lower right corner.



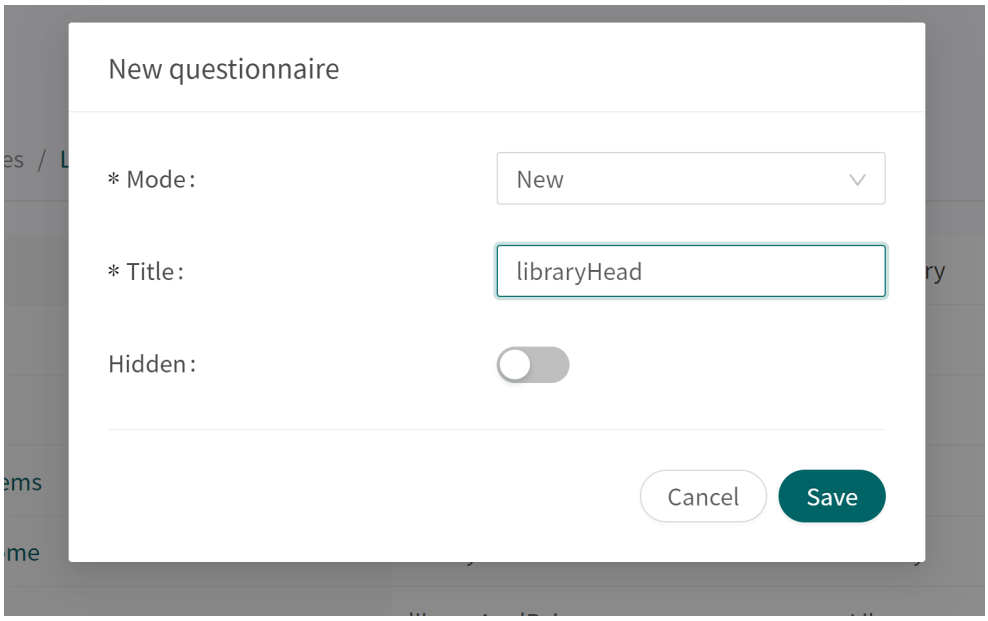
Click “**Save**”. The questionnaire will automatically be given the “**Library**" category and this cannot be edited.

Select "**New**" and enter an **Id** (**Name**) for the new library file.

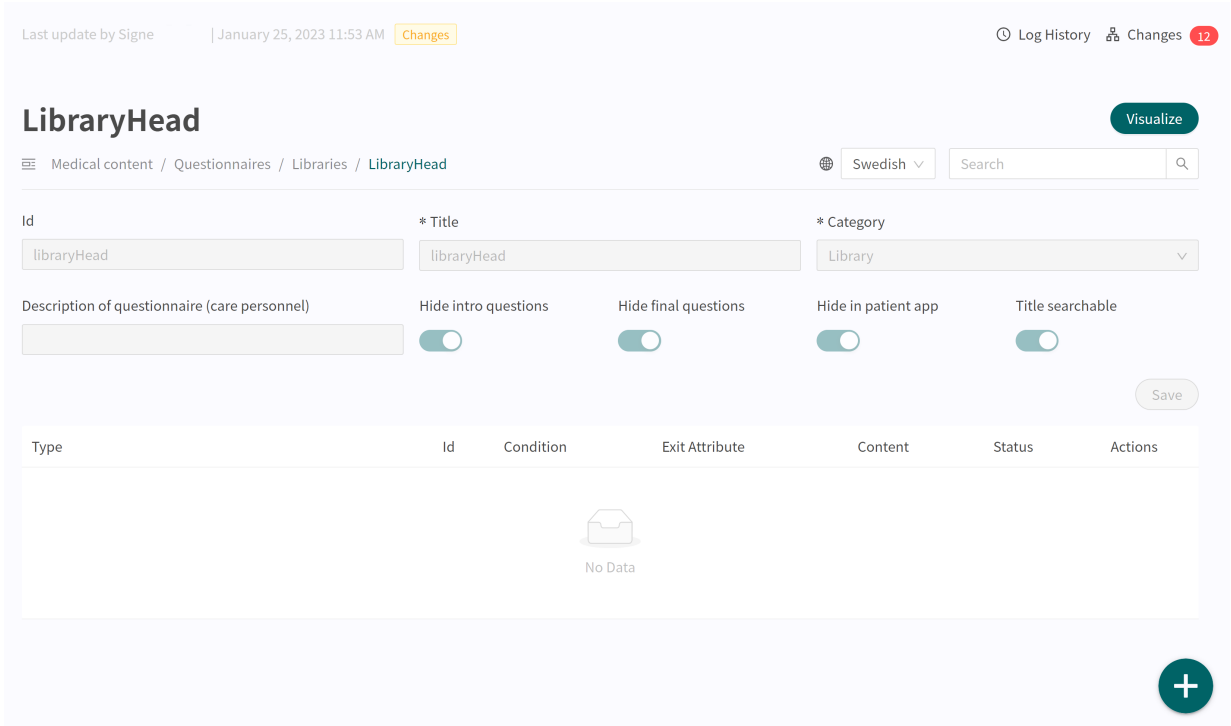
The **ID** needs to be in English and may contain the following characters (no special characters):

- a–z
- A–Z
- 0–9

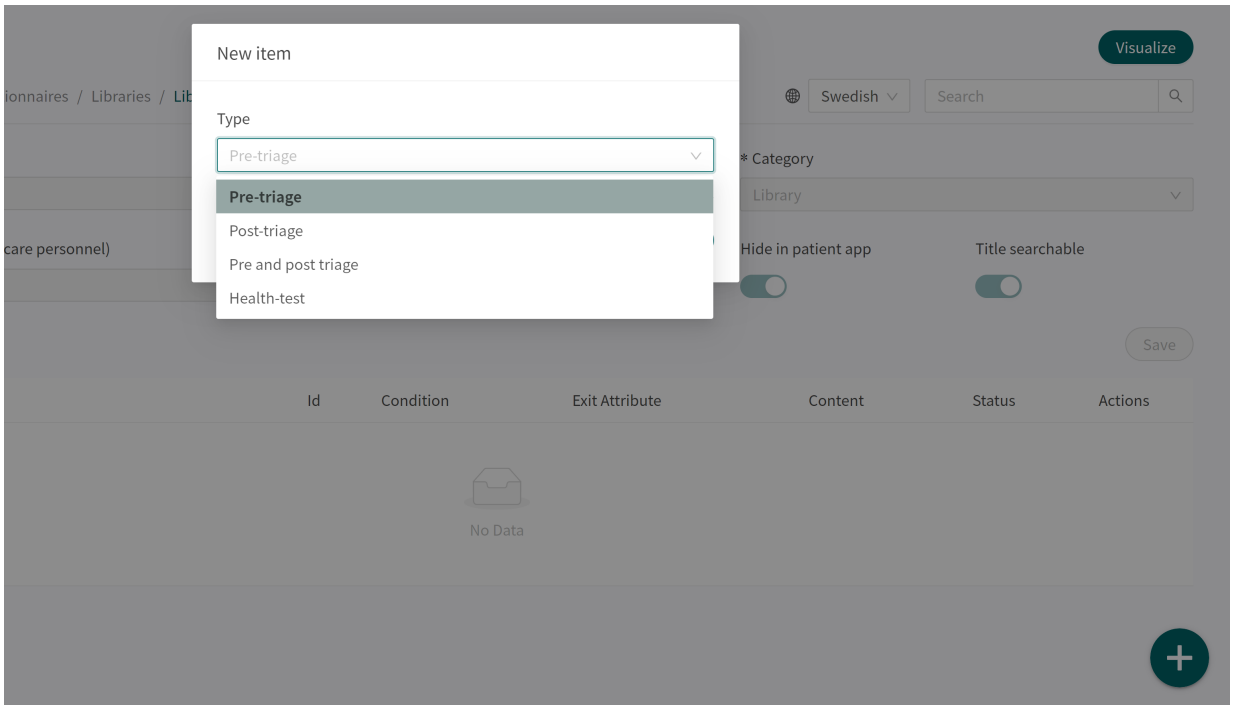
Click “**Save**”. The questionnaire will automatically be given the “**Library**" category and this cannot be edited.



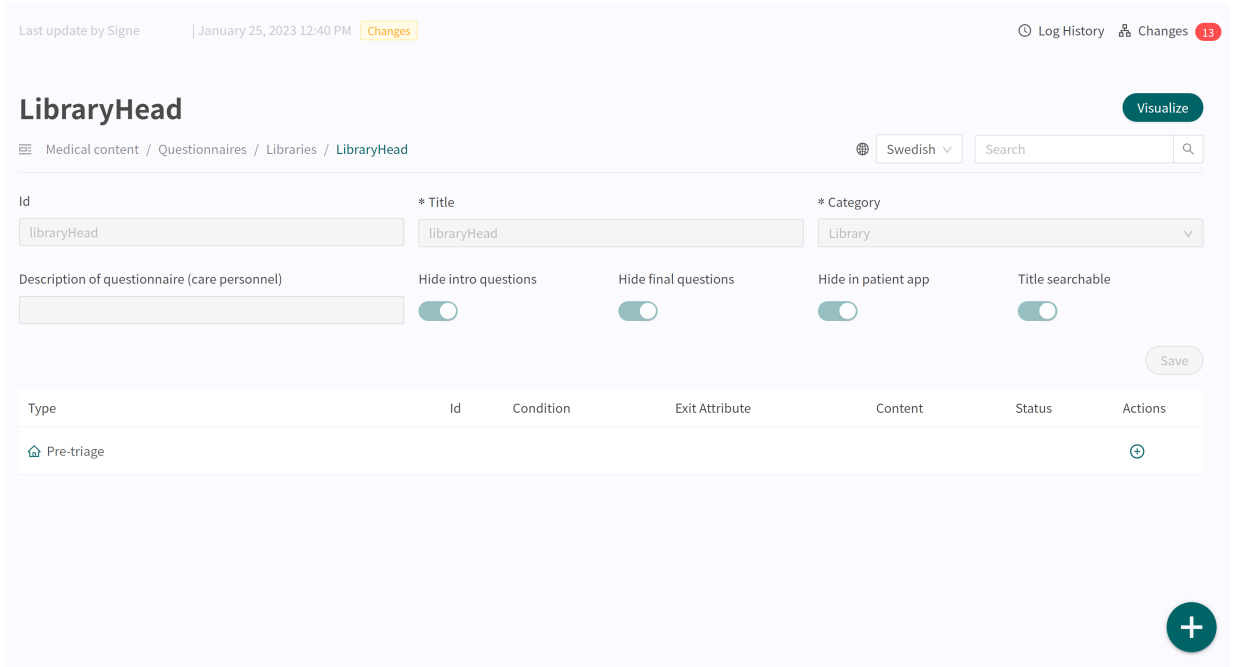
When a new library has been created, it opens directly. **Library metadata** is set automatically to ensure they have the correct settings.



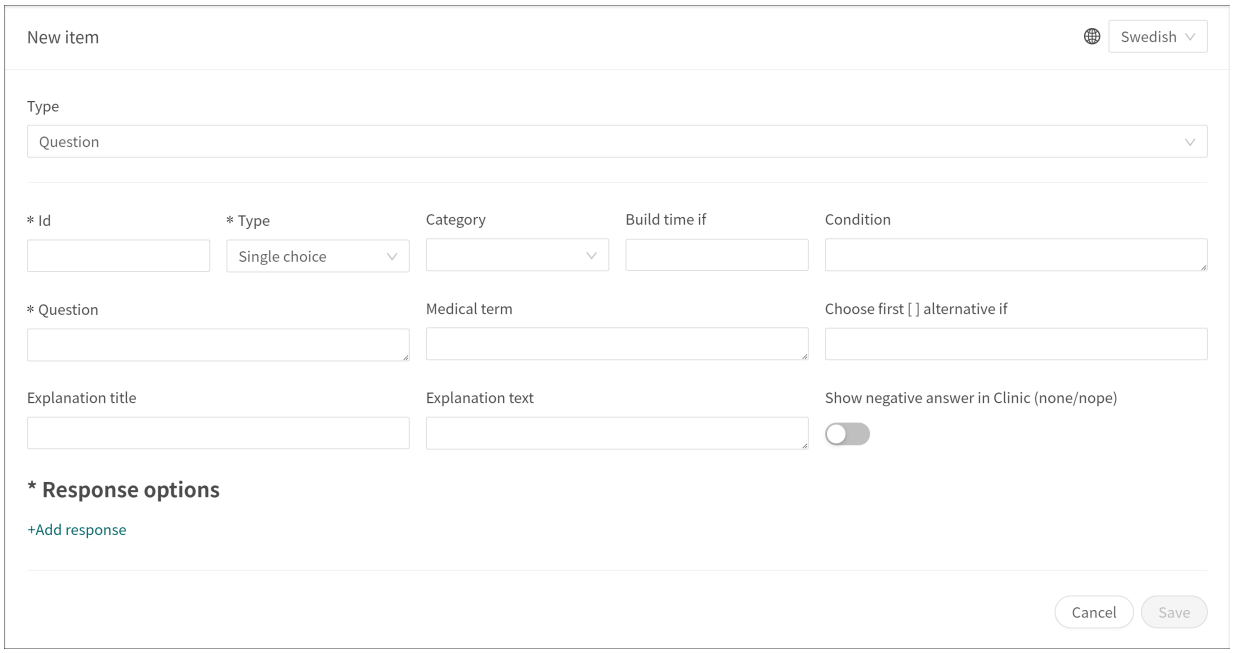
New sections can be added to the library by clicking the plus ⊕ button again in the lower right corner, when you are inside the questionnaire. Here you can choose which section you want to add, you can add a section for each type. Select the section and click **Save**.



Components can then be added to the section by clicking the plus ⊕ sign in the section in which the component is to be added.



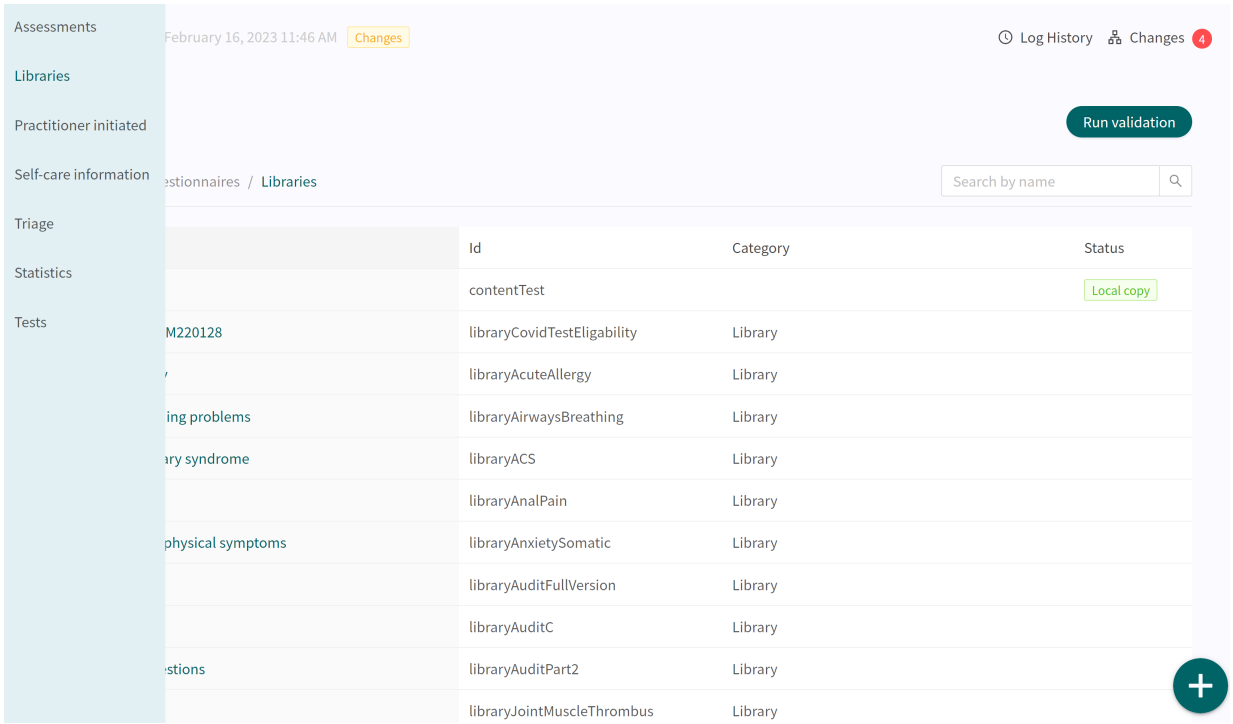
Select in the first **Type** field the type of component to add. Based on component selection, it will be possible to fill in different fields.



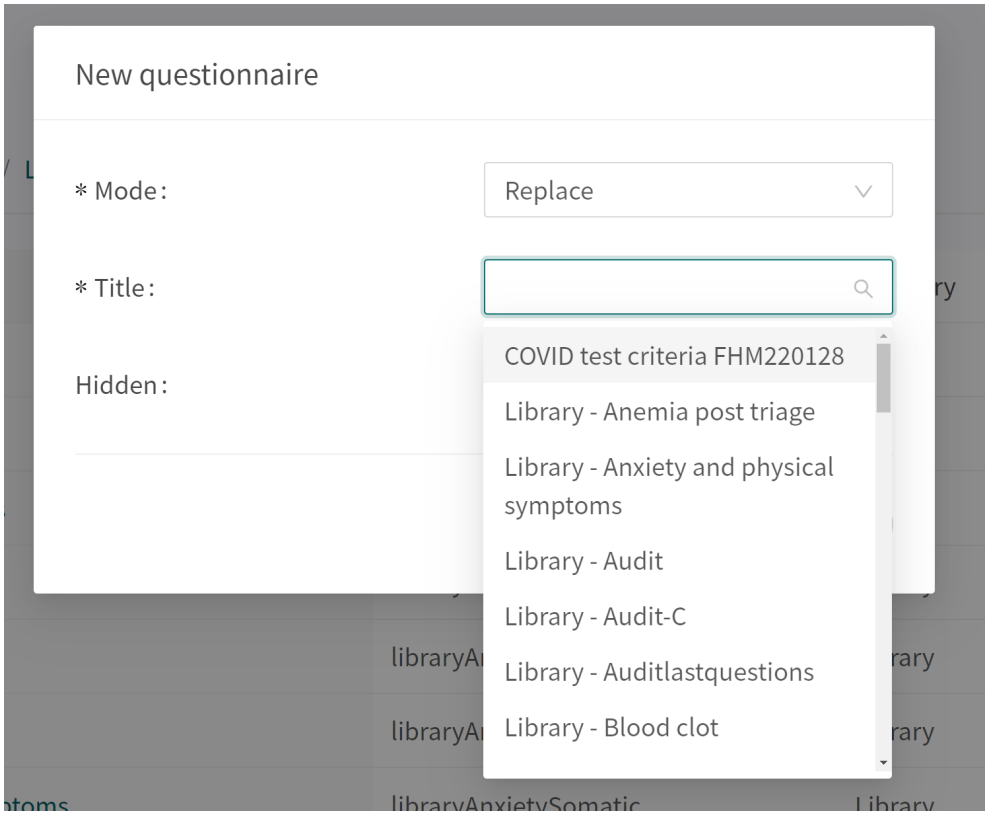
Fields that are mandatory to fill in are marked with an asterisk (*). Click **Save** when the component is complete. The new component will be displayed at the bottom of the selected section. You can drag the new component in the list to sort the order.

8.2.3. Replacing existing libraries

To replace an existing library, go to the **Libraries** section, click on the plus ⊕ icon in the lower right corner.



Select "**Replace**" in the **Mode** drop-down list, and then select which library to replace.



Replacing a questionnaire means copying the entire questionnaire, reusing the same **Id** and the content is copied, but the questionnaire is given **Local copy** for the customer status, meaning that the customer takes full responsibility for further development of the questionnaire.

8.3. Practitioner-initiated

Not used.

8.4. Self-care information

Consists of self-care information provided to patients after triage, if the patient has been triaged to self-care information with a **wait** urgency level. There is self-care information that is included from Platform24 and which is referred to as **default**. It is possible to add new self-care information or replace existing self-care information if required. Self-care information can be linked to a triage exit if the **wait** exit attribute is selected. Refer to the Exits [79] section.

8.4.1. Existing self-care information

The default self-care information is provided by Platform24.

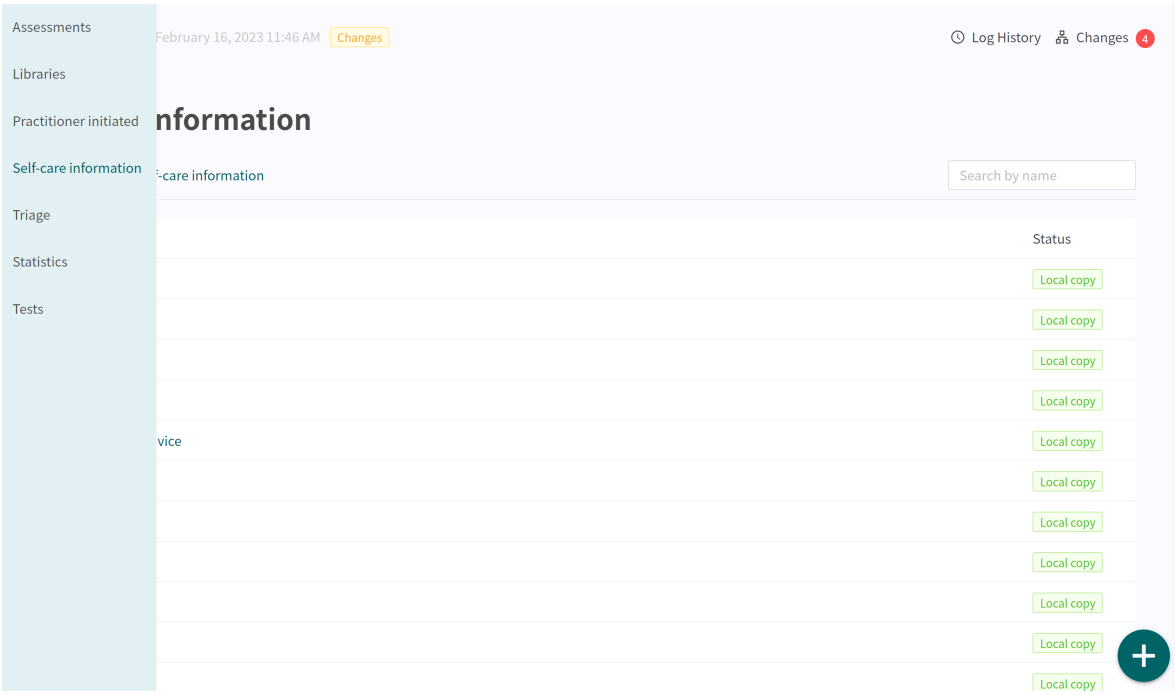
NOTE
If more languages are to be supported, this option must be added in the setting **Customization** for key **Available Languages** for this origin.

8.4.2. Creating new self-care information

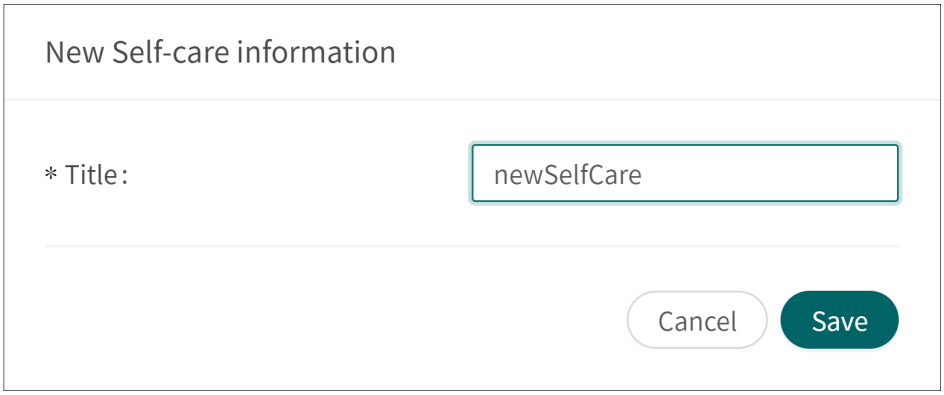
Healthcare practitioners can, if they wish, create their own self-care information in Content Studio+.

To create new self-care information in Content Studio+:

1. Click the plus sign ⊕ in the lower right corner of the self-care information's overview window.

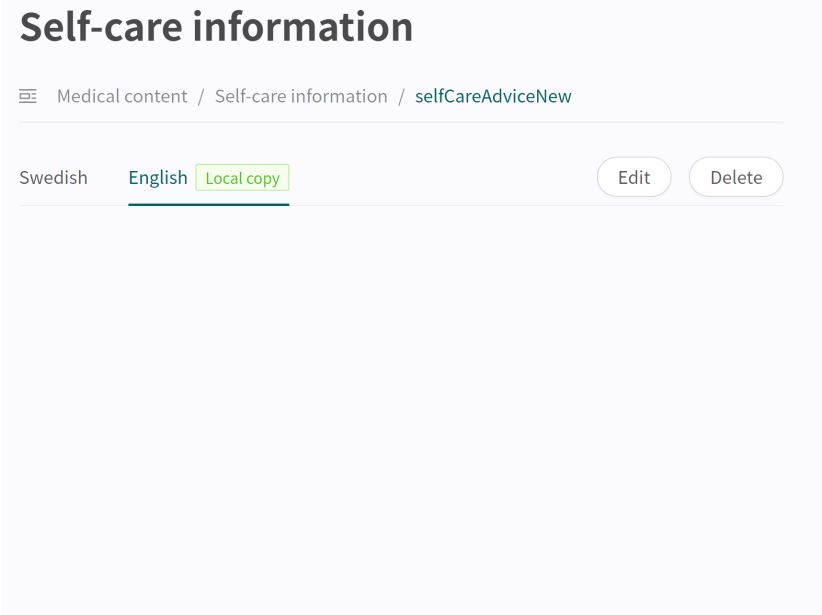


2. Enter a title of the self-care information in the **Title** field. Allowed values: **a-z, A-Z, -, _** (lowercase and uppercase letters (a-z), hyphens and underscores).



3. Click **Save**.

4. When the new self-care information has been created, click on the language the self-care information will be edited in and then click the **Edit** button.



5. Enter the desired self-care information and format the information using the available format options: bold, italic, ordered list, unordered list, links, H2-format (heading styles).
   It is possible to add a picture to the self-care information by clicking the picture icon. The images available to select from are uploaded by Platform24 upon request.
   Select **Preview** to preview the self-care information. Use the **Delete** button to delete a specific language.



6. When the desired changes are made, click the **Save** button.

New self-care information is given **Local copy** status (Local copy), which can be seen in the language of the added self-care information and in the self-care information overview.

8.4.3. Editing existing self-care information

Click the **Edit** button to edit existing self-care information. Edited self-care information will get the status **Modified** (Modified) with the exception of self-care advice created by medical content developers that always will have the status **Local copy** (Local copy).

8.5. Triage

The questionnaires available in the **Triage** section are those patients themselves can search for in the patient app.

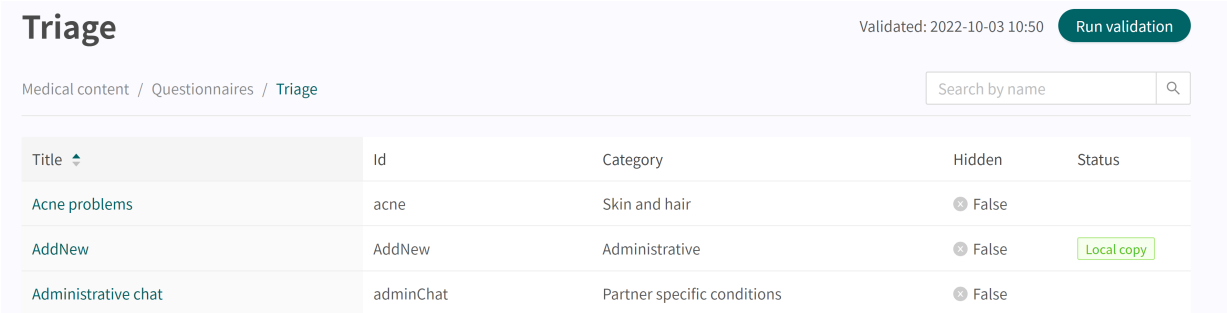
WARNING
Editing and adding to questionnaires in the **Triage** sub-menu can pose a patient-safety risk if a careful analysis of the effects is not performed. Make sure to test any changes made and identify any ensuing changes required to ensure patient-safe flows.

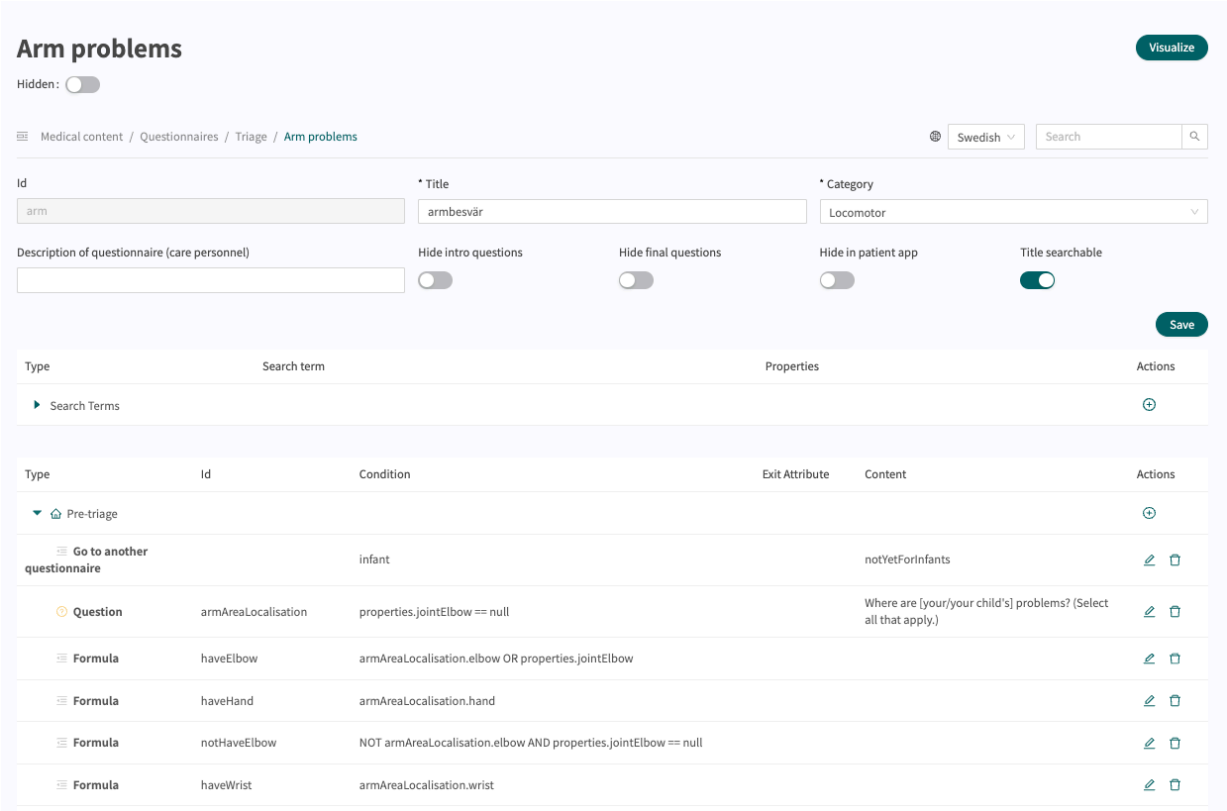
8.5.1. Editing existing questionnaires

The existing questionnaires in this section can be edited with regards pre- and post-triage components. The **metadata** (basic settings) cannot be edited. If one of these fields has to be edited, users can either create a new questionnaire or replace the existing questionnaire.

An existing questionnaire in the **Triage** section can be edited by clicking on the questionnaire you want to edit. In the questionnaire you can select to edit an existing component by clicking on the **pen** , or to add a new component by clicking on the ⊕ button in the desired section.

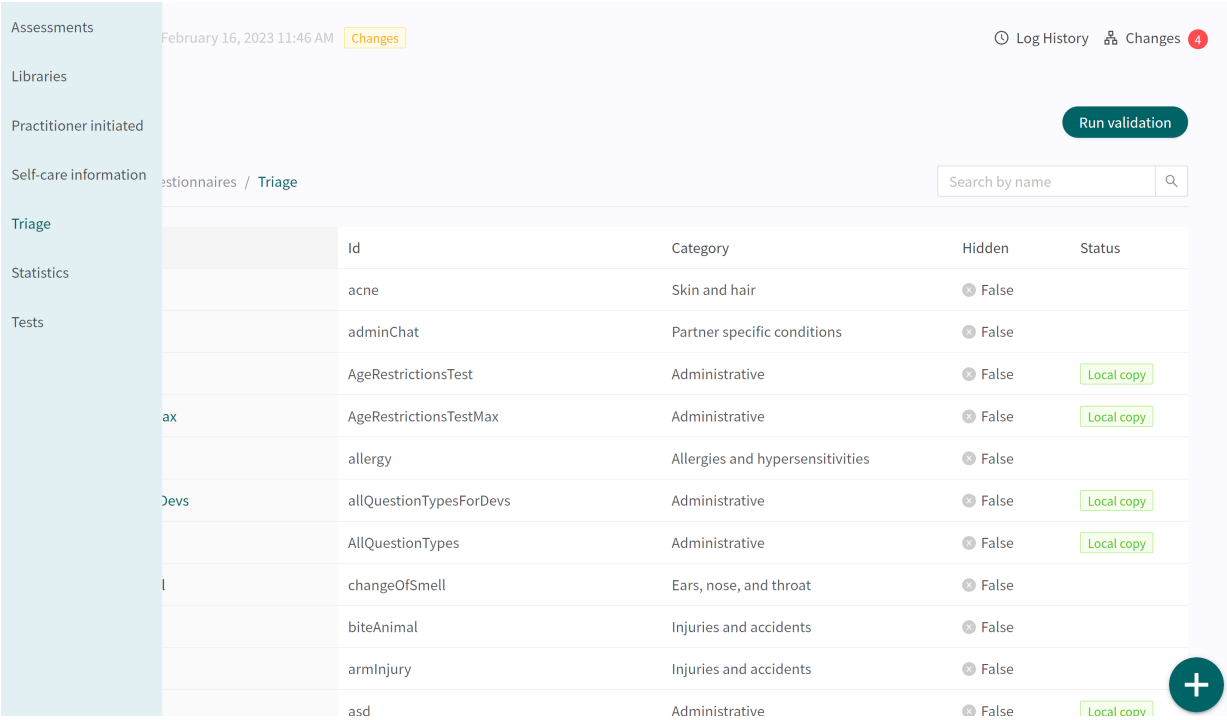



Triage
Validated: 2022-10-03 10:50
Run validation
Medical content / Questionnaires / Triage
Search by name
Title
Id
Category
Hidden
Status
Acne problems
acne
Skin and hair
False
AddNew
AddNew
Administrative
False
Local copy
Administrative chat
adminChat
Partner specific conditions
False


Arm problems
Visualize
Hidden:
Medical content / Questionnaires / Triage / Arm problems
Swedish
Search
Id
arm
* Title
armbesvär
* Category
Locomotor
Description of questionnaire (care personnel)
Hide intro questions
Hide final questions
Hide in patient app
Title searchable
Save
Type
Search term
Properties
Actions
Search Terms
Type
Id
Condition
Exit Attribute
Content
Actions
Pre-triage
Go to another questionnaire
infant
notYetForInfants
Question
armAreaLocalisation
properties.jointElbow == null
Where are [your/your child's] problems? (Select all that apply.)
Formula
haveElbow
armAreaLocalisation.elbow OR properties.jointElbow
Formula
haveHand
armAreaLocalisation.hand
Formula
notHaveElbow
NOT armAreaLocalisation.elbow AND properties.jointElbow == null
Formula
haveWrist
armAreaLocalisation.wrist

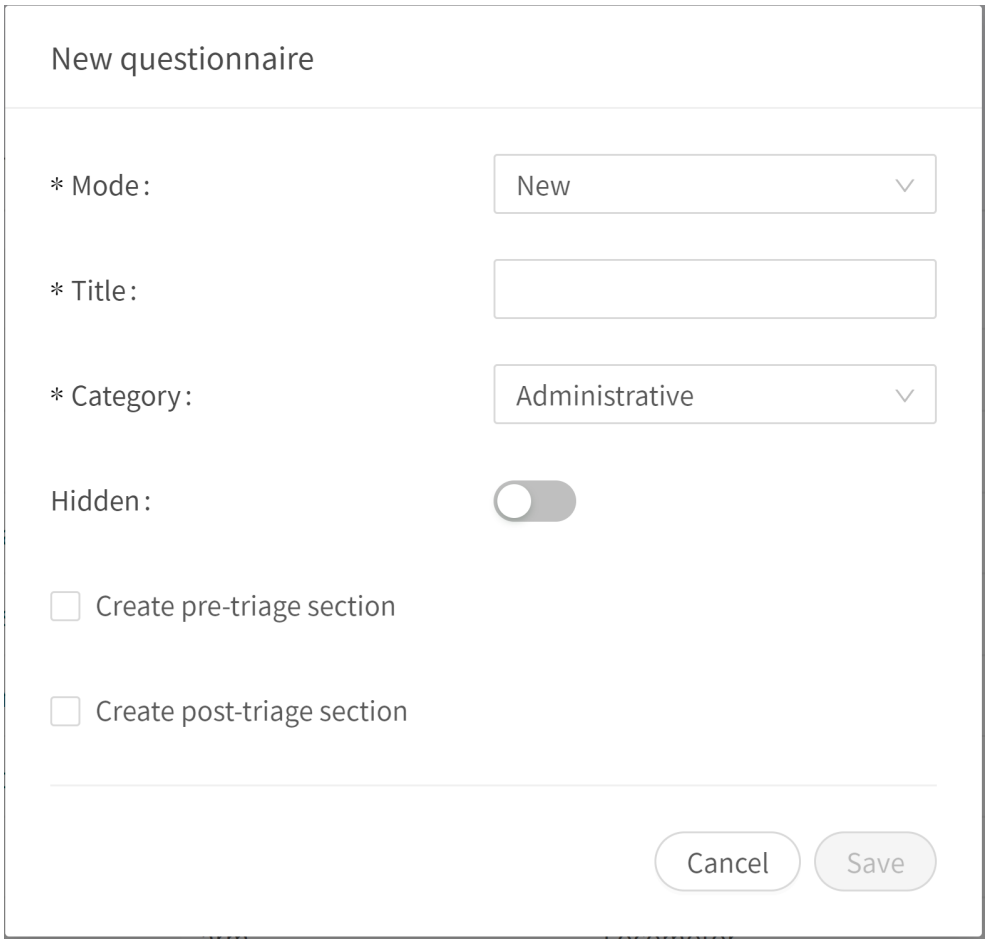
8.5.2. Creating new questionnaires

A new questionnaire is created in the questionnaire overview in the **Triage** section. Click on the large + sign in the lower right corner to open the dialog for creating new questionnaires.

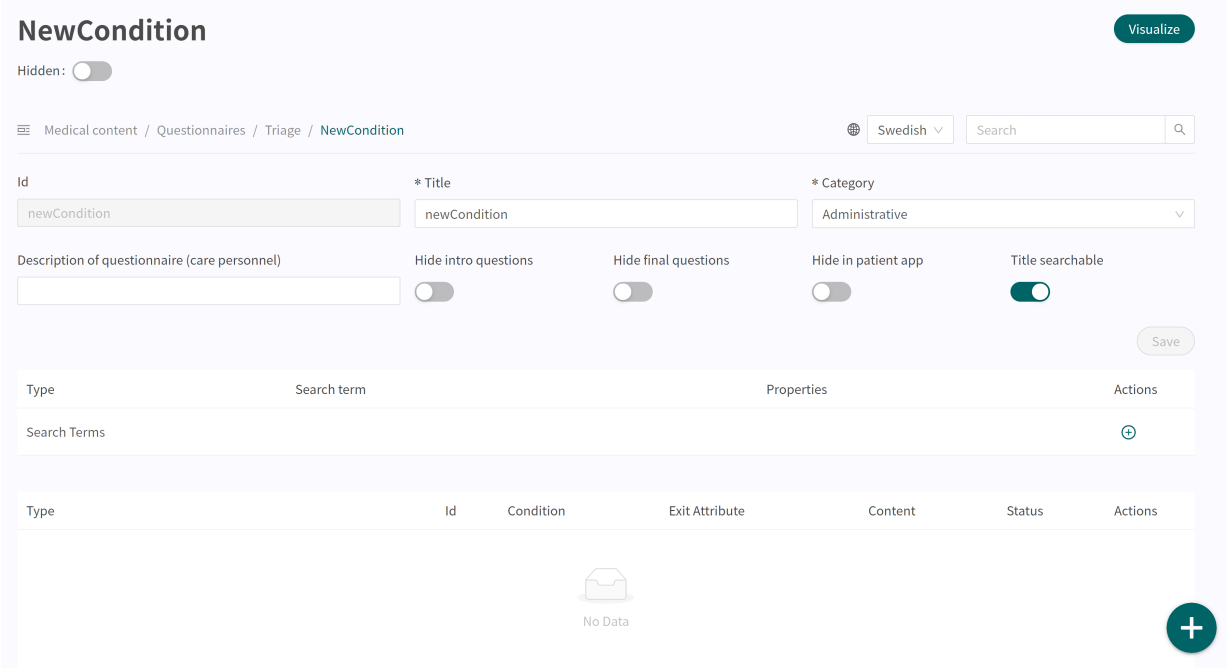


In the window that opens, enter a name **Id** for the new questionnaire using valid characters: **a-z, A-Z**, select which category the questionnaire belongs to, specify if the pre-triage and/or post-triage

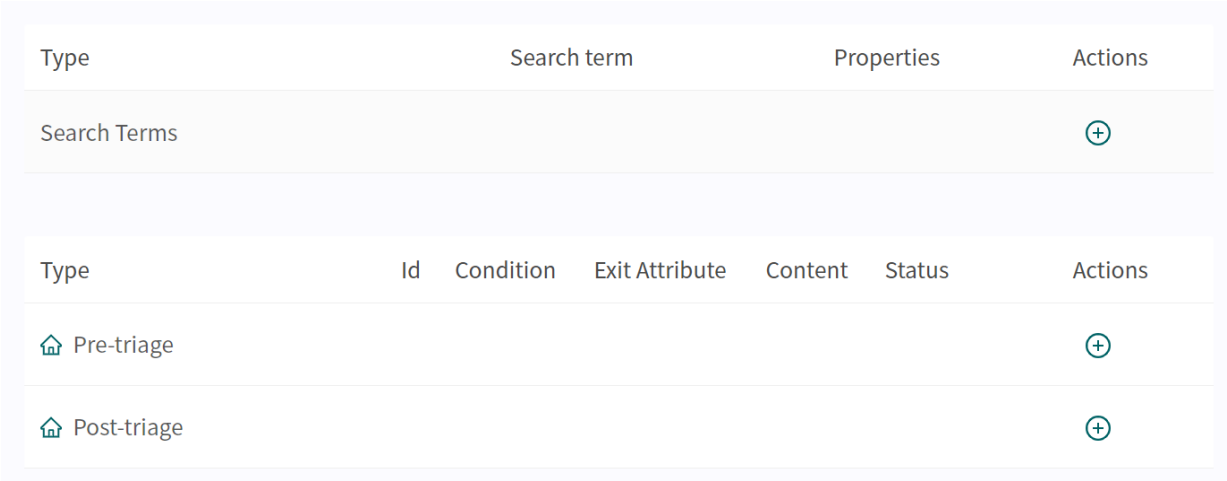
sections in the questionnaire should be created straightaway (can also be added afterwards) and click on "**Save**".



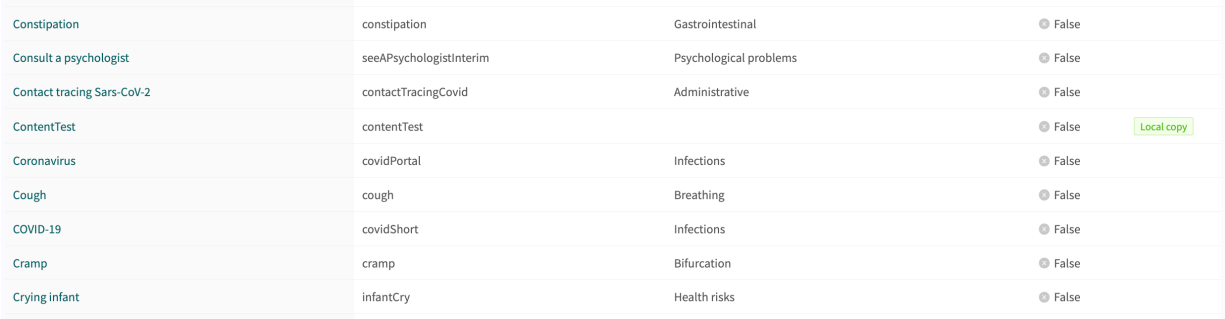
The newly created questionnaire will be visible straightaway on the screen and additional details can be entered or changed, for example a questionnaire **Description**, **Category**, settings if intro and final questions should be asked, etc.



Begin constructing the newly created questionnaire by clicking on the plus ⊕ buttons in the different sections.



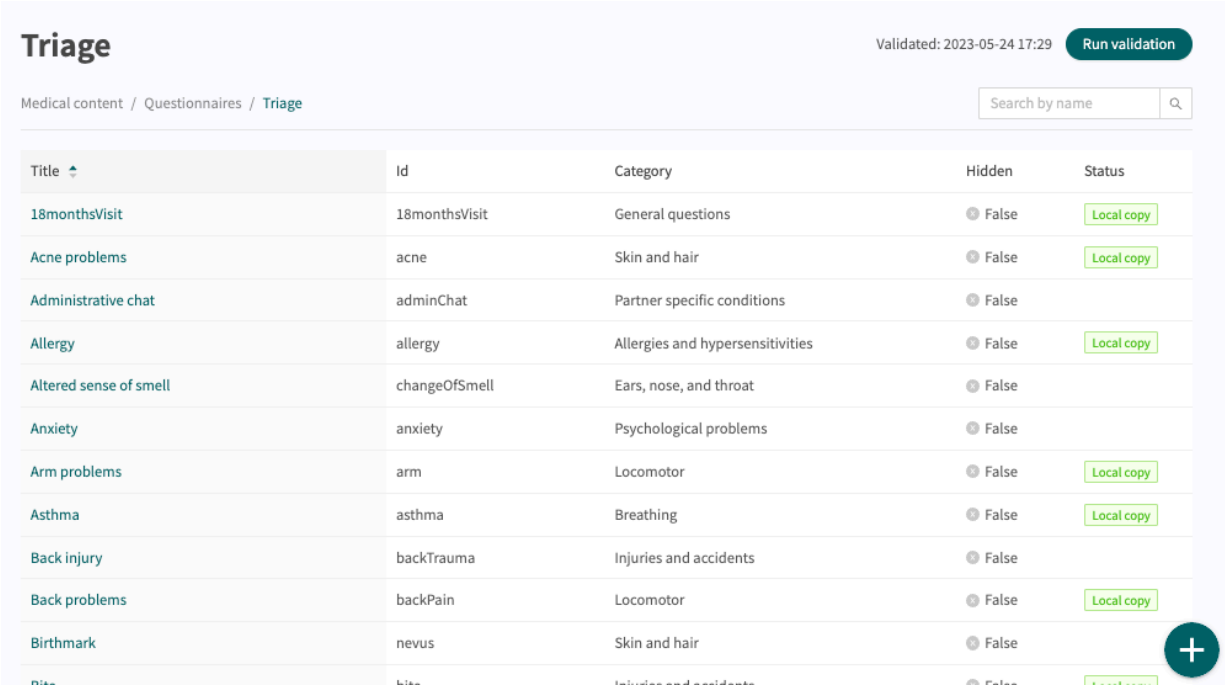
All newly created questionnaires (as well as replaced ones) will have **Local copy** status in the **Medical questionnaires** overview section.



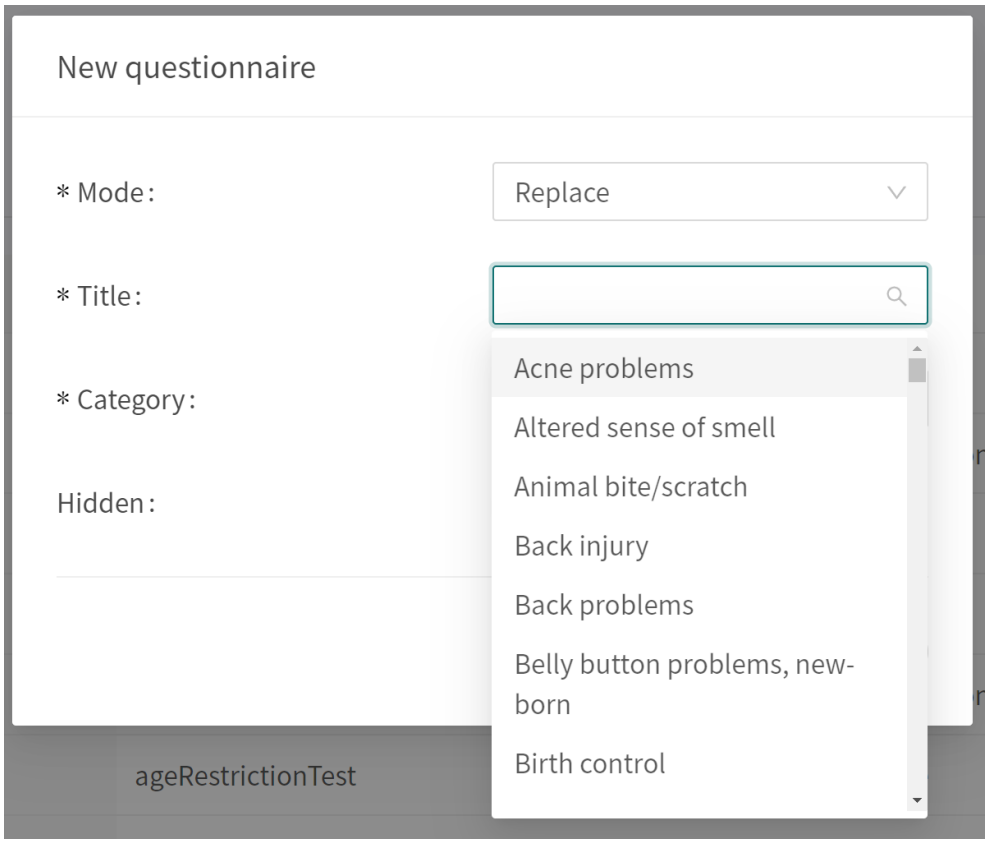
Constipation	constipation	Gastrointestinal	False	
Consult a psychologist	seeAPsychologistInterim	Psychological problems	False	
Contact tracing Sars-CoV-2	contactTracingCovid	Administrative	False	
ContentTest	contentTest		False	Local copy
Coronavirus	covidPortal	Infections	False	
Cough	cough	Breathing	False	
COVID-19	covidShort	Infections	False	
Cramp	cramp	Bifurcation	False	
Crying infant	infantCry	Health risks	False	

8.5.3. Replacing existing questionnaires

Existing questionnaires can be replaced in the questionnaires overview in the triage section by clicking on the large plus ⊕ sign in the lower right corner.



Title	Id	Category	Hidden	Status
18monthsVisit	18monthsVisit	General questions	False	Local copy
Acne problems	acne	Skin and hair	False	Local copy
Administrative chat	adminChat	Partner specific conditions	False	
Allergy	allergy	Allergies and hypersensitivities	False	Local copy
Altered sense of smell	changeOfSmell	Ears, nose, and throat	False	
Anxiety	anxiety	Psychological problems	False	
Arm problems	arm	Locomotor	False	Local copy
Asthma	asthma	Breathing	False	Local copy
Back injury	backTrauma	Injuries and accidents	False	
Back problems	backPain	Locomotor	False	Local copy
Birthmark	nevus	Skin and hair	False	

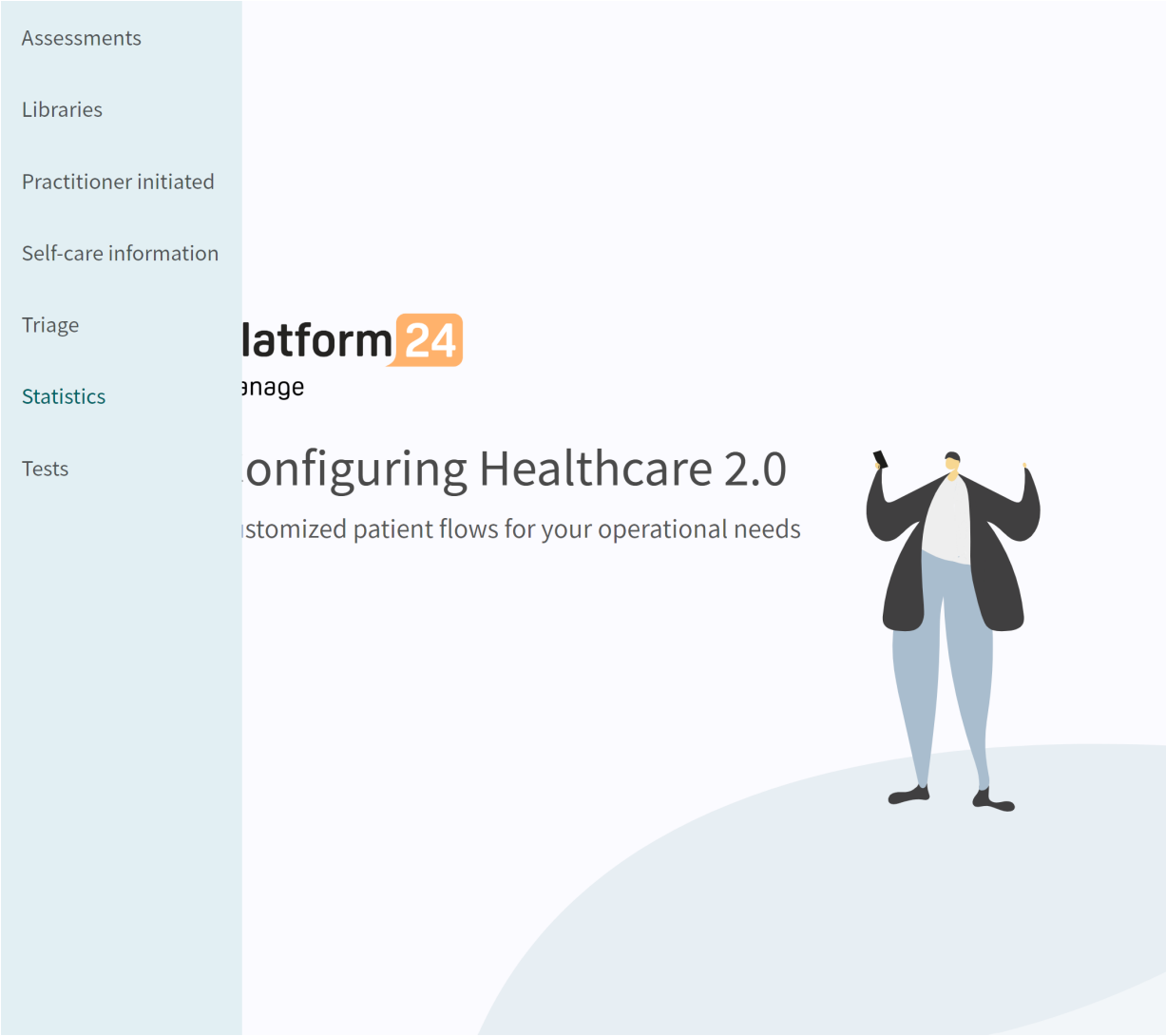


Select "**Replace**" in the first drop-down list and which of the existing questionnaires you want to replace in the second drop-down list. Select also which category the replaced questionnaire must belong to (can also be changed afterwards). When a questionnaire is replaced, it's **Id** and components are reused and this opens the way to also edit the questionnaire's metadata.

Replaced questionnaires can be edited just like New questionnaires. Refer to the Creating new questionnaires [53].

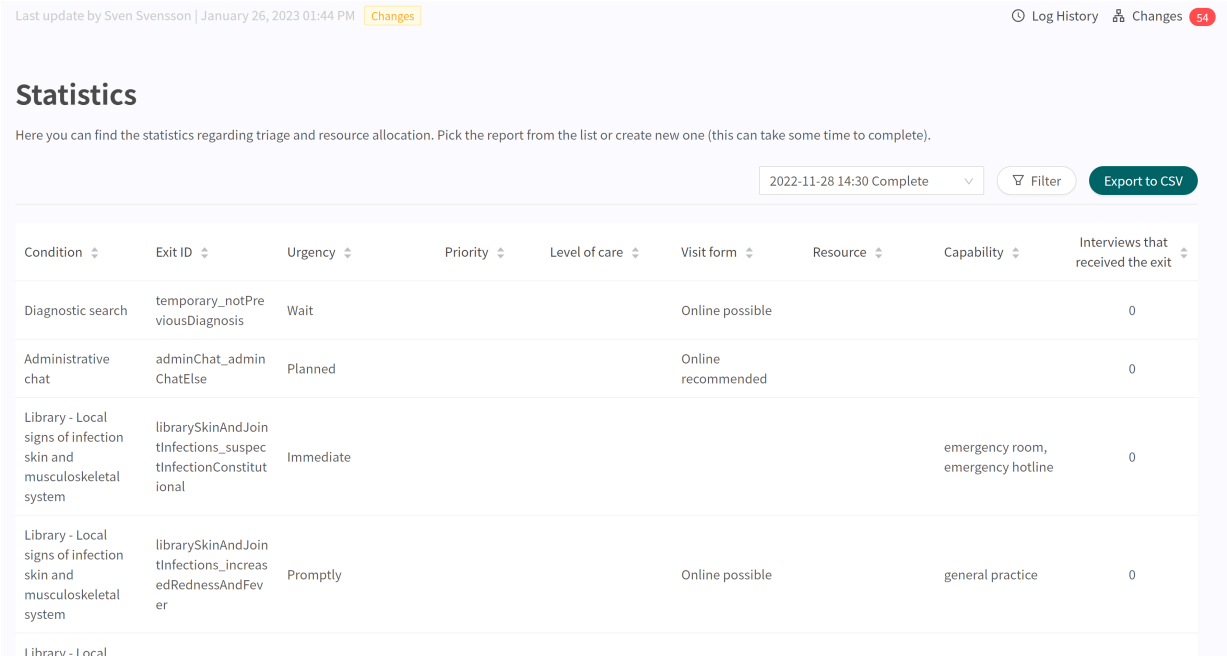
8.6. Statistics

Under the **Statistics** section in Content Studio+, it is possible to create reports containing the existing outcomes in the medical content together with the actual number of interviews that resulted in the outcomes.



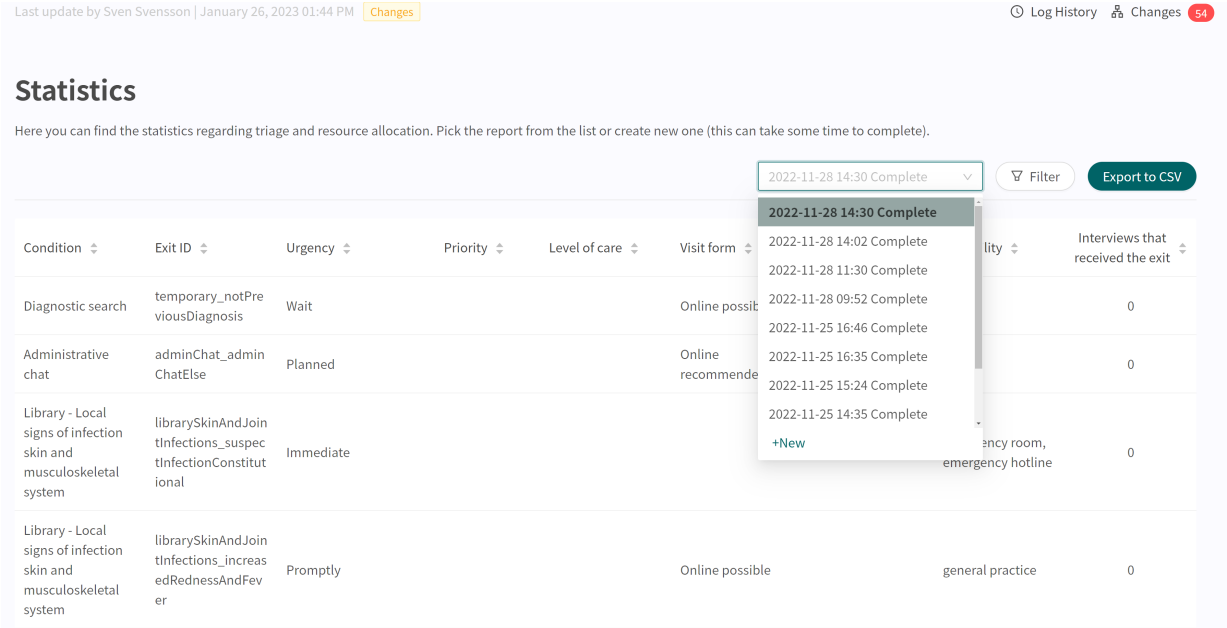
The reports in the **Statistics** section present the number of unique outcomes of the interview based on the medical content. The outcomes are grouped according to Condition, Exit id, Urgency, Priority, Level of care, Visit form, Resource, Capability and number of interviews that received that specific exit. The reports in Statistics count outcomes based on exit IDs that exist in a specific

questionnaire. The reports allow the user to look at concrete combinations of outcome attributes and how often interviews end up on the specific combination.



When you open the **Statistics** tab, the most recent report is displayed at the top by default. However, it is possible to change to an earlier result. It is also possible to filter by exit attribute value to get more specific results and to be able to export the report in CSV format. The filtering function can also be used to manage multiple selections for each filtering option.

To generate a new report, the user needs to open the report drop down and click on the "+New" button.



8.7. Unit tests

Unit tests enables the testing of patient flows in Content Studio+.

Through unit tests, automatic tests are conducted to test different patient flows. When changes are made to the questionnaires , unit testing can be used to discover potential interruptions or errors in the patient flow.

8.7.1. The interview

Interviews for testing purposes are performed via the Patient app in the demo environment.

Each interview has an unique **interview ID**, that can be used to identify it. The **interview ID** can be found from the URL when the final question has been answered in the interview.

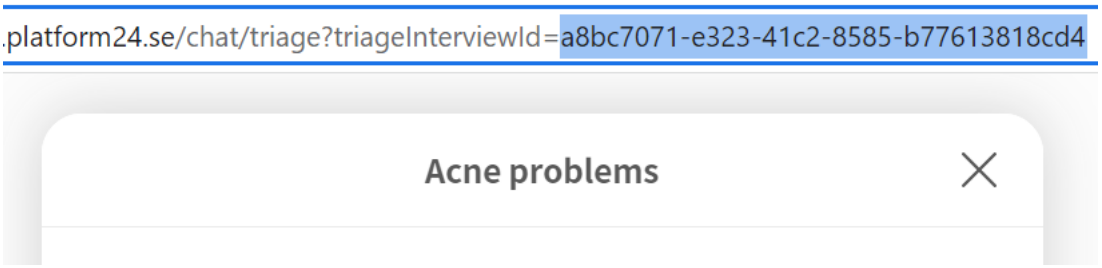
The URL of an interview always ends with the element:

`...triageinterviewid=...` followed by an text string containing letters, numbers and hyphens.

Example:

`...triageinterviewid=f303bd76-6e2d-43fc-bf61-2b8dceb04908`

The text string after `triageinterviewid=` is the **interview ID**.



Interview types

An interview can be performed as an anonymous patient or as a logged in patient.

Logged in Patient	When testing as a logged in patient, this particular patients parameters, such as gender, age etc, are taken into account in the unit test logic.
Anonymous (not logged in) patient	Patient parameters, such as gender, age etc, are inserted into the system via the interview questions.

NOTE
If a logged in or anonymous patient is to be used for testing depends on what type of patient flows your organisation uses.

All types of patient interviews used in production should be tested.

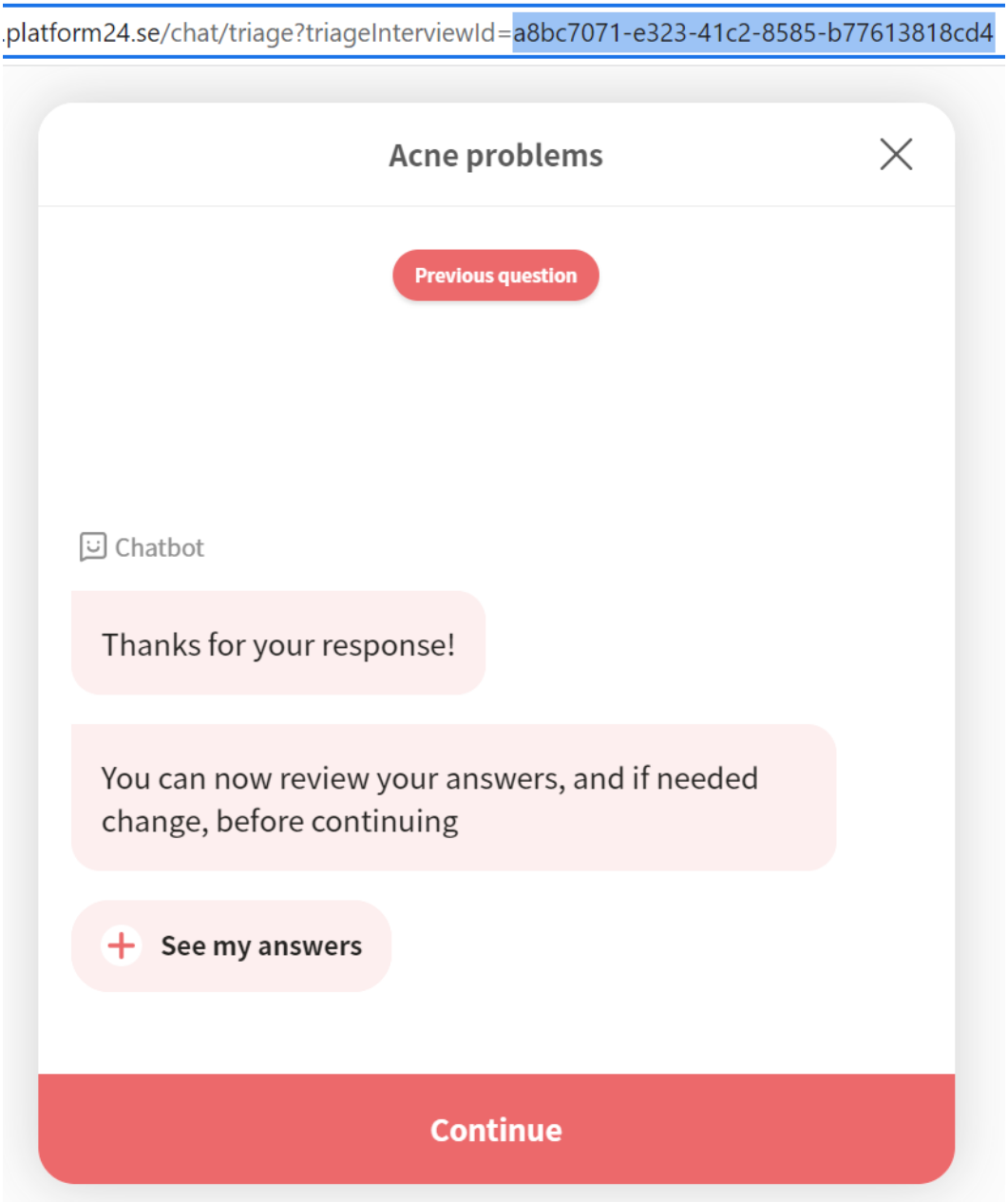
IMPORTANT
Interviews used for testing purposes should always be saved and documented.

8.7.2. Conducting unit tests

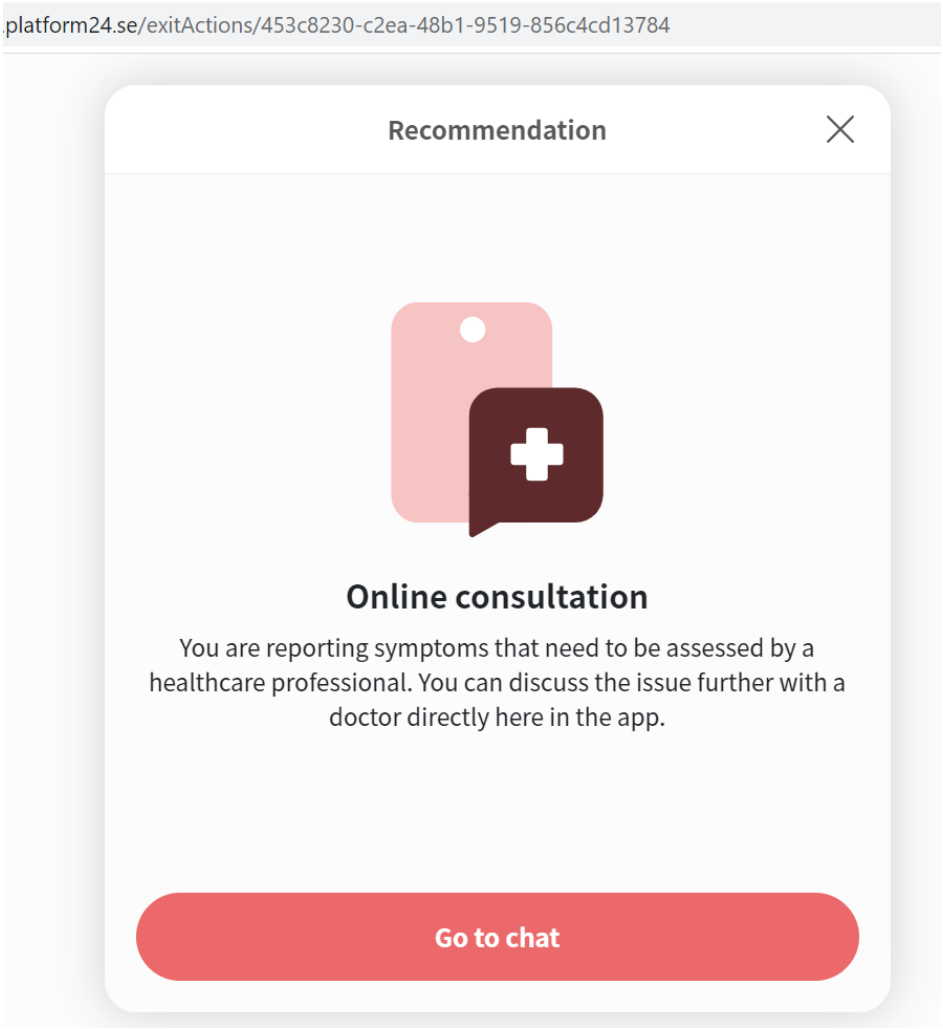
To create a unit test you need the an **interview ID** from an interview performed in the patient flow you intend to test.

Each **interview ID** is unique and connected to a specific interview.

1. Go to the demo environment.
2. Start the Patient app and step through the patient flow that you wish to test, but without clicking the **Continue** button (clicking the **Continue** button will lock the interview and the **interview ID** will no longer be displayed).
3. Before clicking the **Continue** button, copy the **interview ID** from the interview URL.



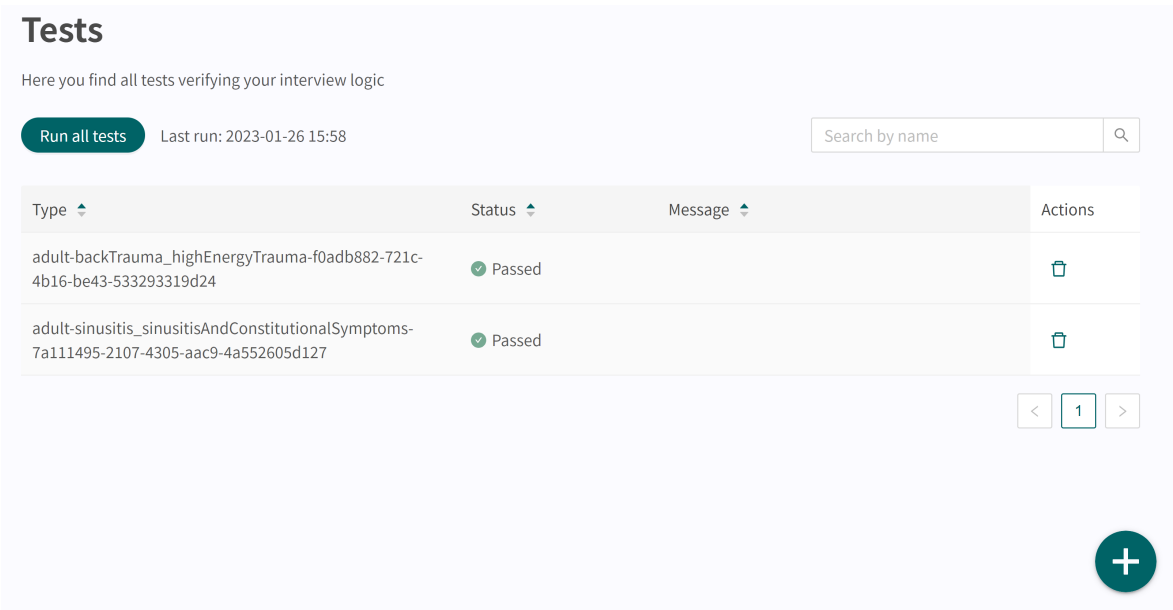
4. Click the **Continue** button. This will lock the interview and exit in a **Recommendation**.



5. Go to Manage and click on the **Tests** section in the **Medical content**.



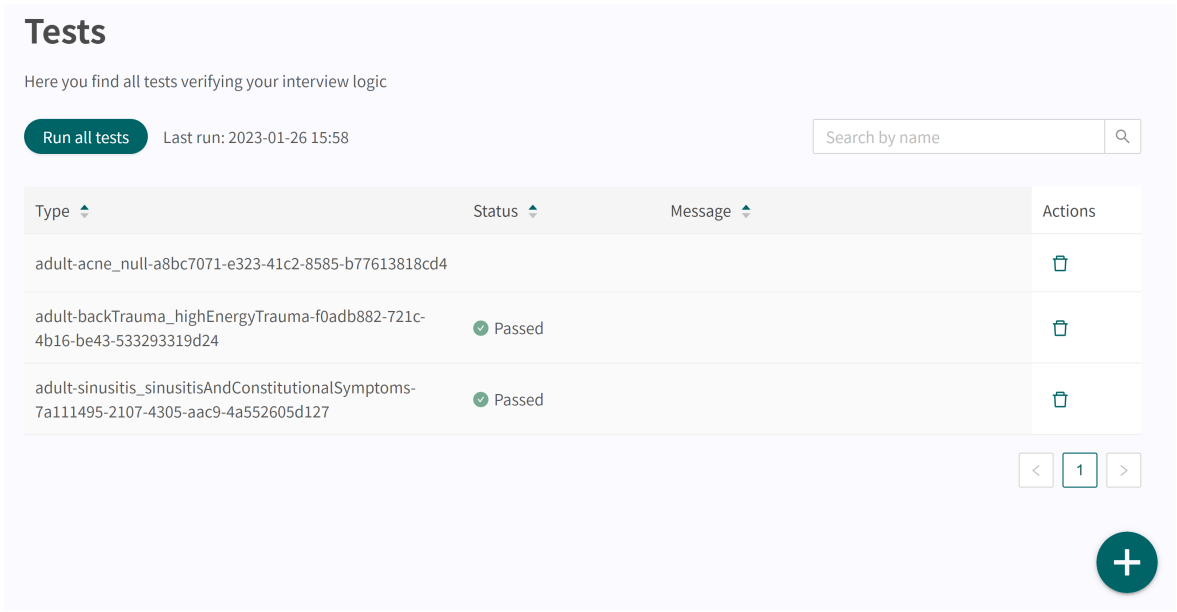
6. Click on the large green plus ⊕ button in the lower right corner.



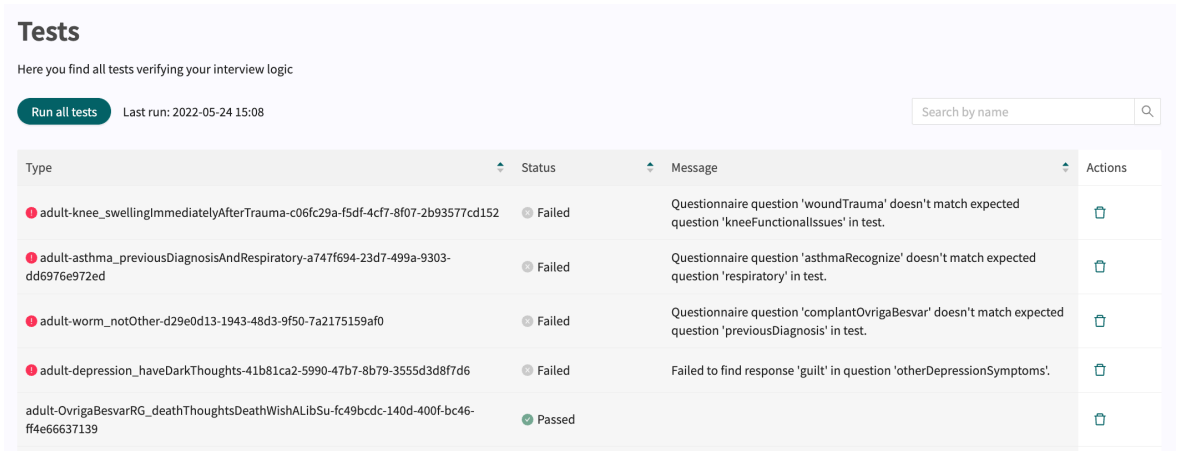
7. Paste the Interview ID into the **Interview ID** field in the pop-up and click **Save test**.



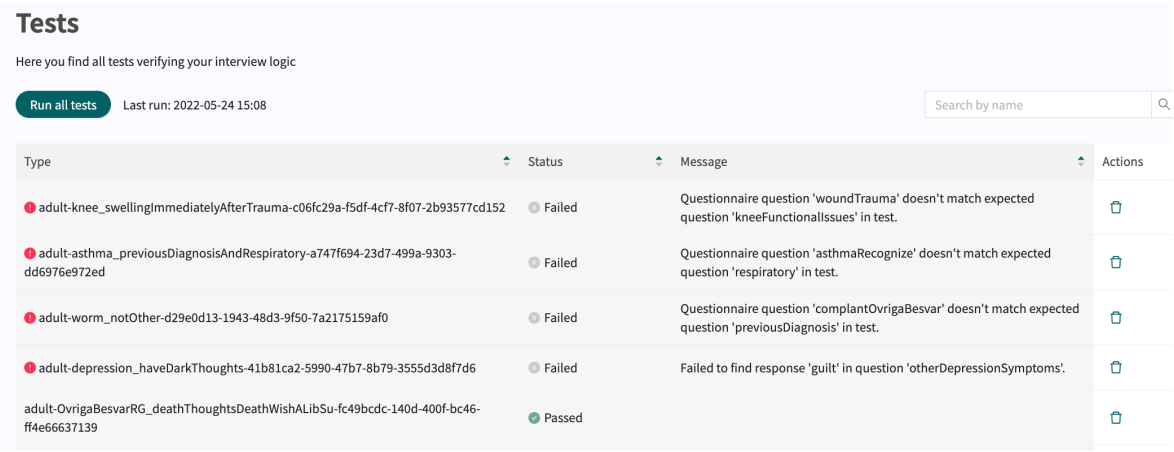
8. To start the test, click on the **Run all tests** button.



9. When the tests are running the **Run all tests** button will be blocked and a text **Validation in progress** will be visible.
10. The result of each tested patient flow is presented in the **Status** column with "**Passed**" or "**Failed**".
    Tests with the **Failed** result are displayed at the top of the list.



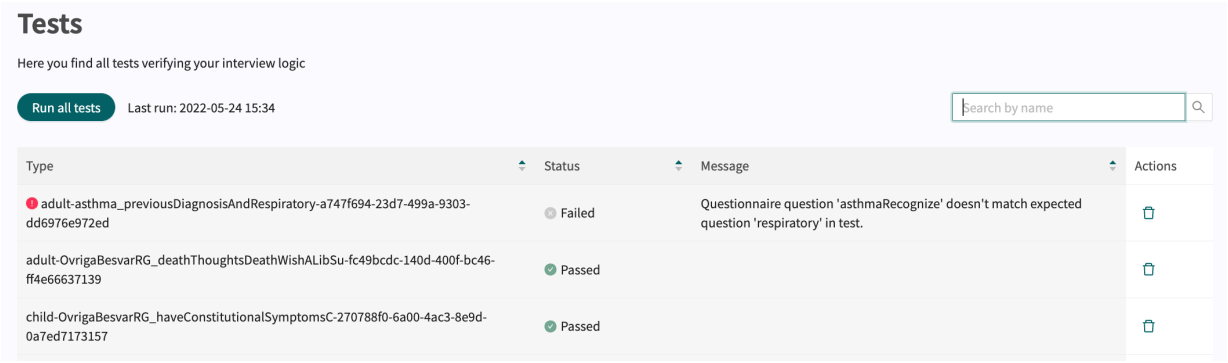
11. If the test gets the result "**Failed**", the error message is displayed in the **Message** column.



12. To the right, next to the **Run all tests** button, the date and time of the last test run is presented.

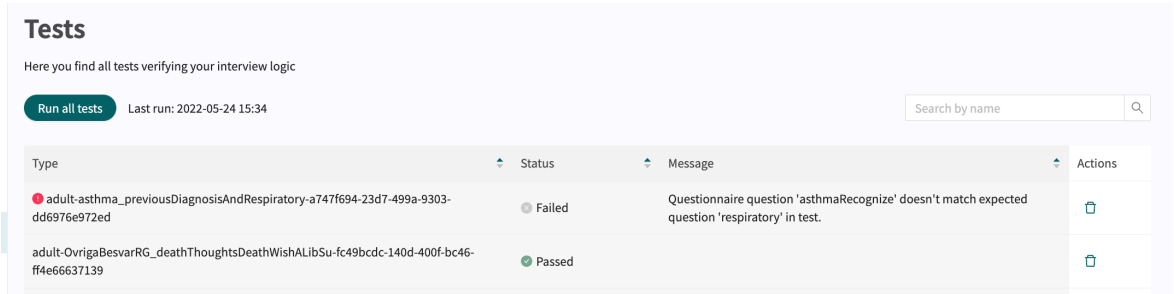
8.7.3. Searching for tests

Searching for a test is done by using the search field in the upper right corner.

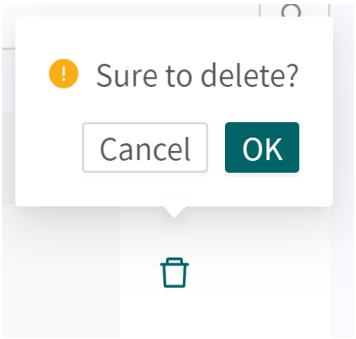


8.7.4. Deleting tests

1. To delete a test, click the rubbish bin icon to the right of the test.



2. Click OK to confirm that you wish to delete the selected test.



9. Components in Questionnaires

Questionnaires can consist of many different components. Here is a description of what different components do and should be used for and what attributes exist for each component.

9.1. Metadata

Each questionnaire contains a section called **Metadata** with content that can be seen at the top of the questionnaire. **Metadata** is basic information that helps to identify the questionnaire.

9.1.1. Attributes and values in Metadata

> **NOTE**
> All attributes are not valid for all types of questionnaires.

Id

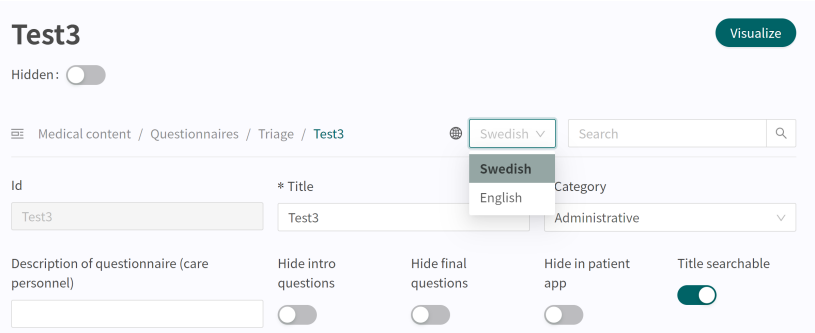
All questionnaires have an **Id**.

The **Id** needs to be in English and may contain the following characters (no numbers or special characters):

- a-z
- A-Z

Title

Questionnaire free text title. This must be stated for all languages the questionnaires will be displayed in. Switch language for the questionnaire to edit the **Title** field in another language.

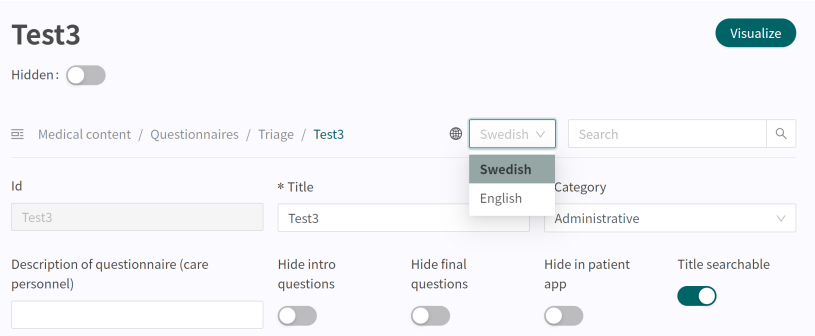


Category

All questionnaires are divided into categories. Certain categories can only be selected within certain sections, for example, only questionnaires in the **Libraries** section can have the **Libraries** category. Categories can only be selected and edited when users create a new or replaces an existing questionnaire in the triage section. In the other sections, system categories are defined based on section.

Description of questionnaire

A free text field where a description of the questionnaire can be added. This description will be visible in Clinic for practitioners. Switch language for the questionnaire to edit the **Description of questionnaire** field in another language.



Hidden A setting that hides the questionnaire. The questionnaire will not be visible in Clinic or in the Patient app.

Hide intro questions A setting that enables intro questions from the `libraryTriage-Boot` library to be asked or not asked. They are always automatically asked in questionnaires.

Hide final questions A setting that enables final questions from the `libraryTriage-Boot` library to be asked or not asked. They are always automatically asked in questionnaires once the triage is concluded.

Hide in patient app A setting that prevents any search terms from being loaded into the questionnaire's *Natural language processing* and as a result the patient cannot see the questionnaire in the Patient app. This applies to the entire system and should be used if questionnaires are never loaded into NLP or displayed to patients, e.g., assessments.

Title searchable A setting that enables questionnaire descriptions to be generated as search terms in the Patient app.

9.2. Sections

9.2.1. Pre-triage

This section defines the components used before patients are given recommendations after a concluded triage. This section contains logic-driven questions and exits, where most of a questionnaire is defined. Can only be added to the following "**Triage**" and "**Libraries**" questionnaire categories.

9.2.2. Post-triage

This section is used to define components that are used after the patient has been booked/has queued for an appointment. This section normally contains questions that are good for healthcare practitioners to be aware of, but which do not drive any logic further in how patients should be triaged. For example, the issue of asking patients to upload photos is something that currently cannot drive logic but is good for healthcare practitioners to see, even if it is not decisive. This section can be added to all questionnaire categories except "**Assessments**".

9.2.3. Health tests

Occurs in questionnaires with the questionnaire category "**Assessment**" and, in certain cases, "**Libraries**" categories. Questionnaires with the "**Assessment**" section very rarely have logic-driving components, but are static and straightforward with the most questions. An example is the *MADRS-S* questionnaire

9.2.4. Pre-Post triage

Only in questionnaires with "**Libraries**" category. Library statements can be defined as "pre-and-post-triage", which means that questionnaires using library questions can be borrowed for either pre- or post-triage.

9.3. Search terms

Search terms describe which search terms patients or healthcare practitioners should use using a free text search in the Patient app or Clinic to access a specific questionnaire. If users select a search term, the questionnaire to which the search term belongs will be displayed. E.g.: **Search term**: "Headache" results in **Questionnaire**: "Headache". Normally, there are already several search terms defined for a questionnaire, but it is possible for users to add more if required.

The search term must always contain:

- Search term

9.3.1. Attributes and values in the Search term component

Search term Search term displayed in the patient app to provide access to the questionnaire where it is defined. Note that the *NLP* solution in Platform24 calculates probabilities that what the patient has written matches the exact search terms for a questionnaire and, based on this, displays the search results

Properties



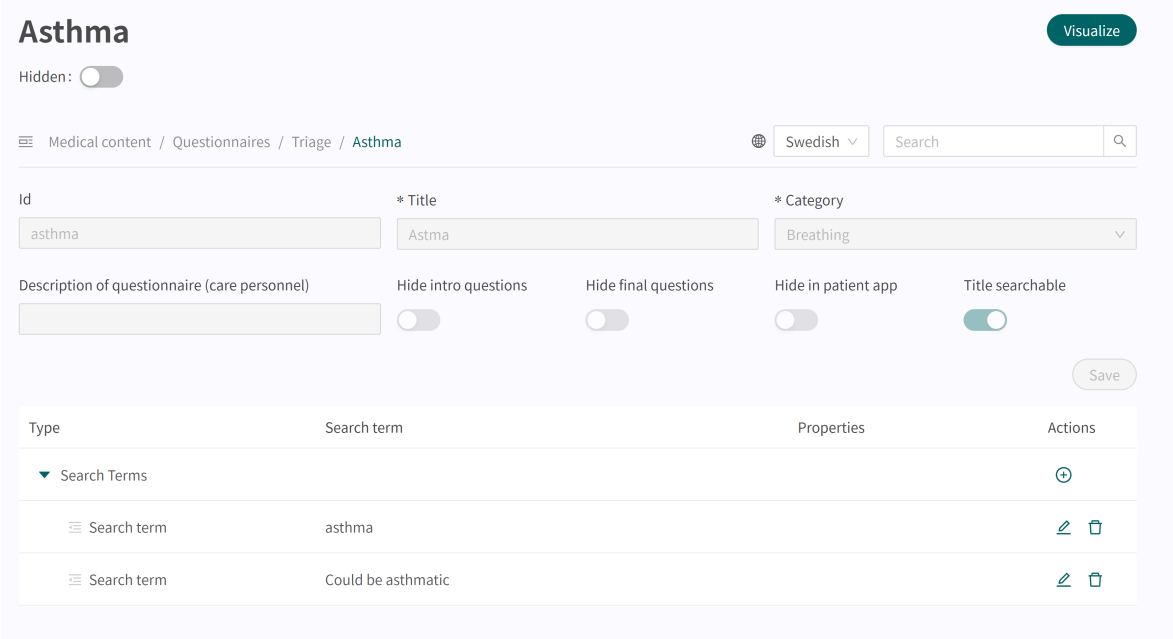
NOTE
It is currently not possible to edit properties.

Properties added to questionnaires by patients, such as a search term like "pain in leg" should have "**leg**" as a property to ensure the logic in the questionnaire can then be based on the knowledge that patients have already stated that the pain is in a leg (and not an arm). The properties can be used for conditions (in other components) by typing "`properties.<properties>`". Users are allowed to define their own properties for search terms, but then they also are required to add logic for how a property must be used in a questionnaire, for example using conditions.

The "`someParam`" property is set for some search terms in the medical content. It has been used for many search terms because it is easier to specify logic based on a property used by many search terms and which, as a patient, then has an impact on more inputs in the questionnaire. Can be compared to a generic property used by many search terms.

9.3.2. How to add a search term

1. Open a questionnaire and expand the "**Search Terms**" section.

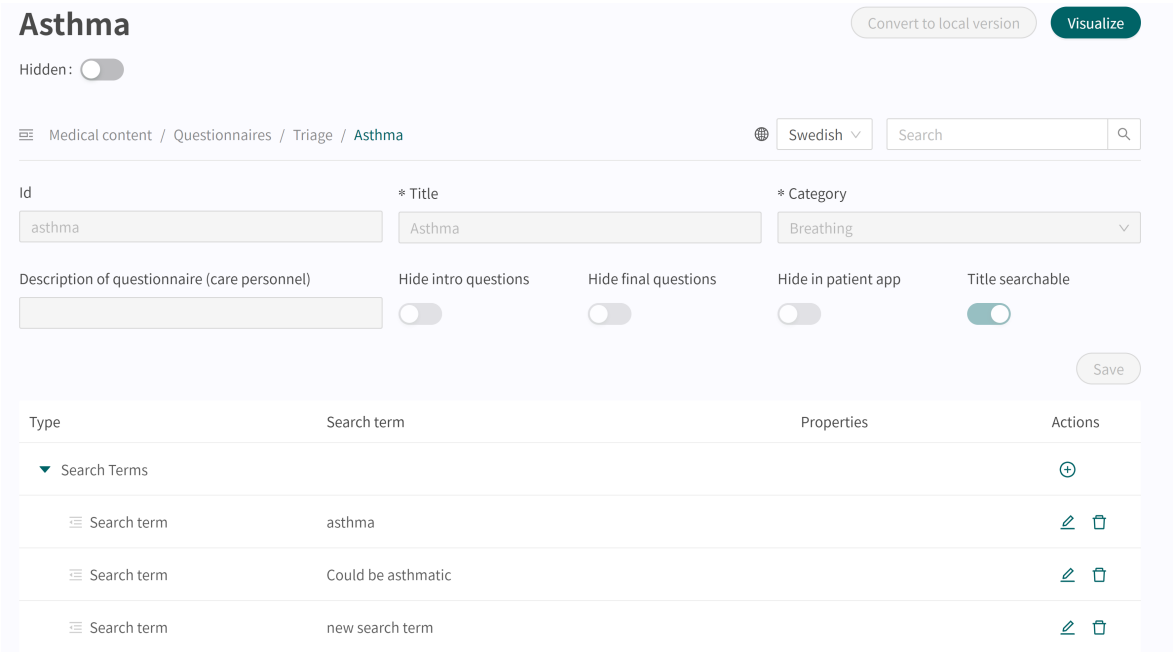


2. Click the plus ⊕ sign in the **Actions** column to add new terms to the questionnaire.
3. Select which language the search term should be added to and specify the search term in the **Search term** field.



4. If desired, it is possible to add properties to the search term in the **Properties** field. Properties can be, for example, that the patient already has indicated the localization of the pain via the search term and should not receive a question about the localization of the pain in the questionnaire.

   The added properties in a search term can be used in conditions by typing "`properties.<Properties>`". Users are allowed to define their own properties for search terms, but then they also are required to add logic for how a property must be used in a questionnaire, for example using conditions.
5. Click **Save**. The search term will now be displayed in the search term list.



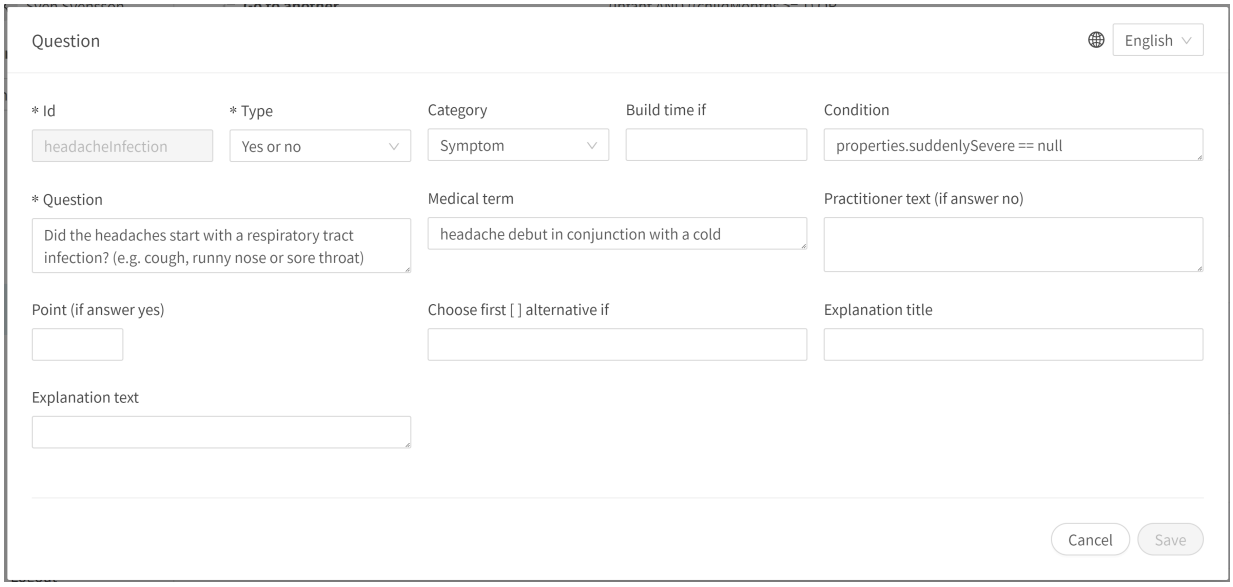
Example:

In the **Headache questionnaire**, there is the search term, “Got a pounding headache” with the properties "`severe`", "`suddenly`" and "`suddenlySevere`".



In the question "`headacheInfection`” there is a condition (`properties.suddenlySevere == null`), which means that patients who have sought help using the above search term will not

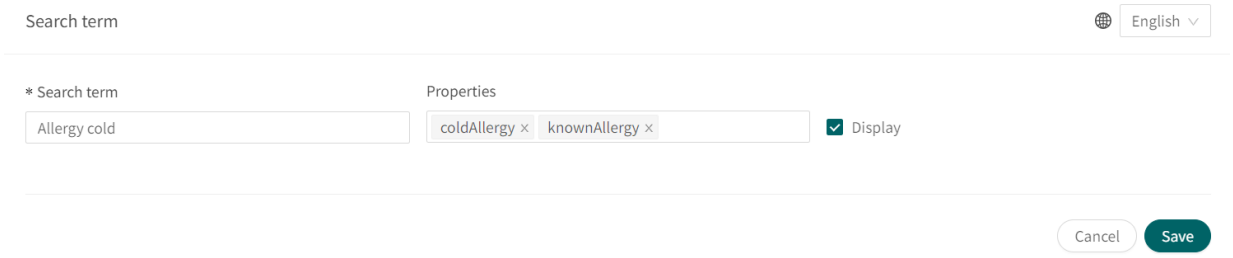
be asked this question. This is because they have already provided information that makes the question below unnecessary from a medical and usability perspective.



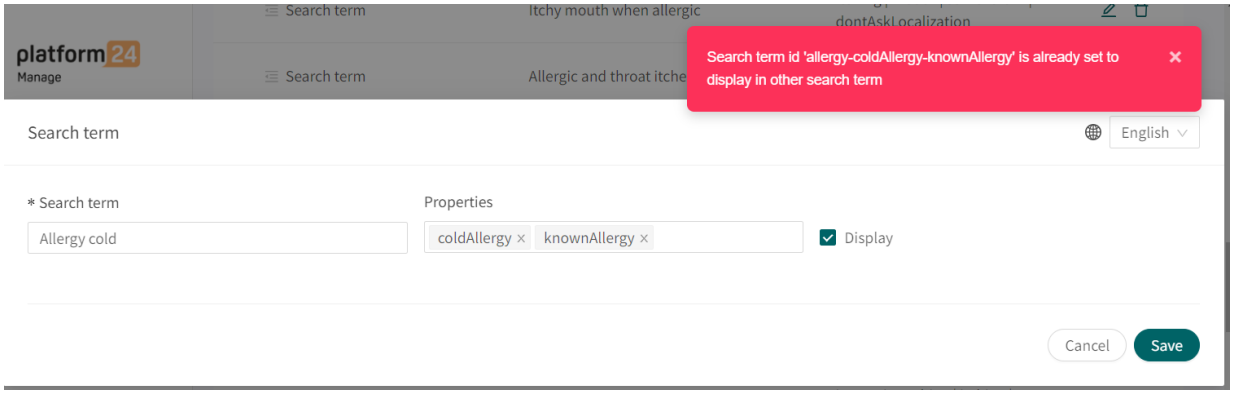
9.3.3. Unique search terms and the Display option

A search term is unique if it has a unique set of properties compared to other search terms. If several search terms share the exact same properties, the search term that is first (at the top) of the list, will be the one displayed in the Patient app in a free text search that matches the search term according to NLP.

To organize and select which search term to display when searching in the Patient app, it is also possible to select the **Display** option to determine which search term to display.



If two or more search terms with the same properties are marked with **Display**, an error message will be shown as it is not possible to use the **Display** option on multiple search terms with the same properties.

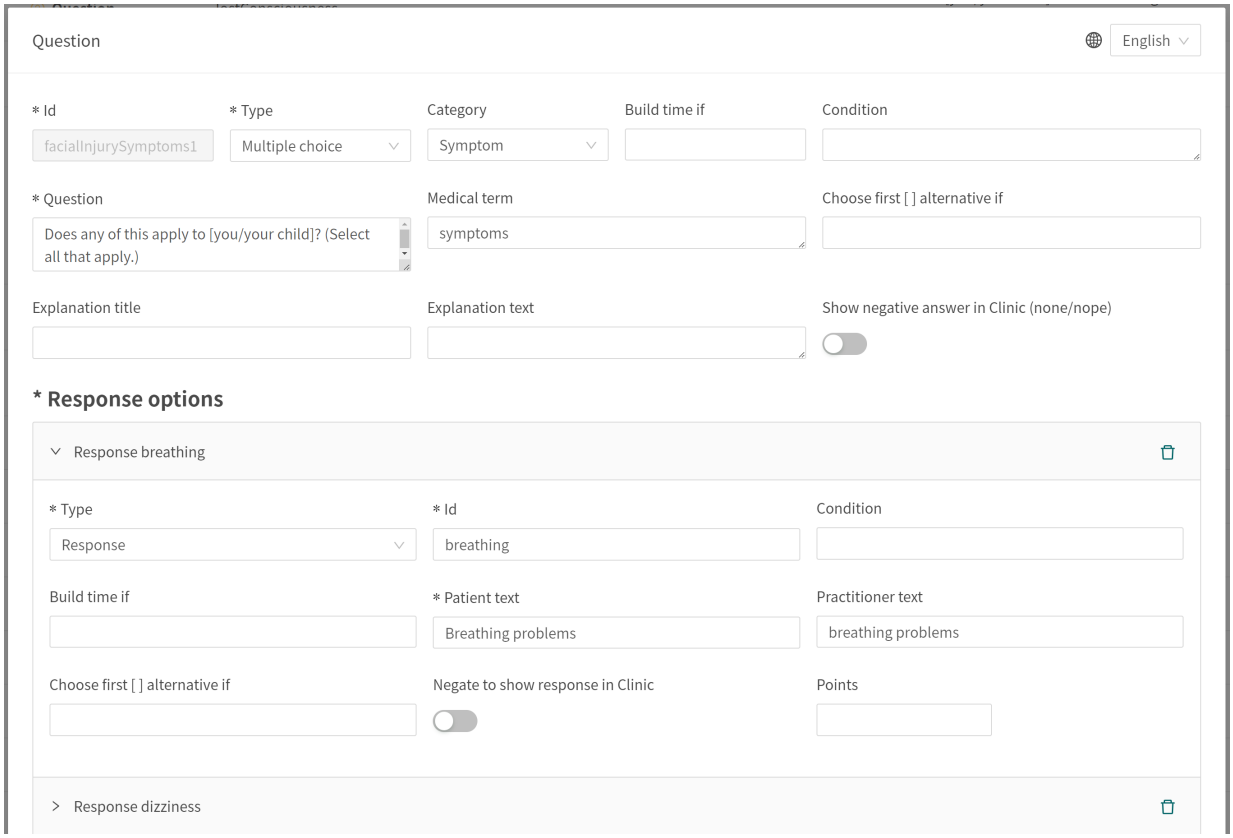


9.4. Questions

The core functionality of the triage is to ask patient some questions. In this section, more detailed information about how questions are created is given.

Questions must always contain:

- **ID**
- **Question type**
- **Category** (if the question is to be included in the automated summary in Clinic)
- **Question**
- **Response** (for Single choice and Multiple choice question type)
- **Medical term** (if the question is to be included in the automated summary in Clinic)



9.4.1. Attributes and values in Questions

ID

All questions have an **ID**.

The **ID** needs to be in English and may contain the following characters (no special characters):

- a–z
- A–Z
- 0–9

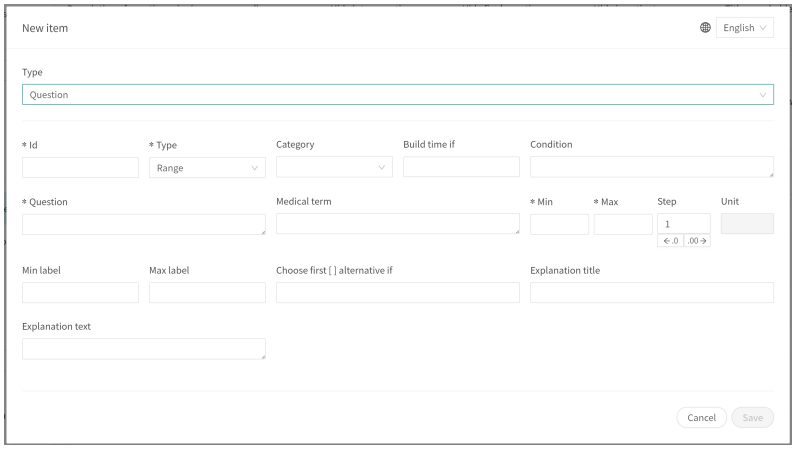
Question type

Different types of questions to ask can be selected.
The following question types are available:

- **Multiple choice** – must contain at least one response option and several answers can be selected by the patient
- **Single choice** – must contain at least one response option and one answer can be selected by the patient
- **Yes/No** – the system auto-generates the Yes and No response options
- **Yes/No/Maybe** – the system auto-generates the Yes, No and Maybe response options
- **Number** – a minimum and maximum value can be specified to indicate within which range the patient can answer the question
- **File** – used when the patient is asked to upload an image or a pdf file. Supported file formats are jpg, png, jpeg and pdf. The question can be made optional using the "**skippable**" field.
- **Medication** – Prescription renewal uses this question type.
- **Date** – displays a calendar view to the patient in question. The question can be made optional using the "**skippable**" field.
- **Free text** – the patient can answer using free text. The question can be made optional using the "**skippable**" field.

> **NOTE**
> The triage bot doesn't use the content of the **Free text** field to calculate its results. Instead the free text reply is used to give the practitioner additional context.

- **Range** – provides the patient with a slider in the patient app to interact with when providing an answer. Min and Max values, Step and Unit headings are stated in the question. Step indicate how many decimals are allowed in the answer, i.e., how detailed the answer can be.



Category

Category can be specified for questions. The category specifies how and under which category the question should be summarized in the automated summary in Clinic. For more information, see Categories [117].

Build time if	Refer to general **Build time if** in the Frequently occurring attributes section.

Condition

Conditions for when a component will be activated for the patient. For example, a response to a question is required for the next question to be asked.
If the condition is to validate that a patient has answered a certain answer, the following syntax is specified:

`<questionId>.<responsId>`

If the condition is to validate that a patient answered **Yes** (yes/no question) the following is used:

`<questionId>`

If the condition is to validate that the patient answered **No** (yes/no question) the following is used:

`NOT <questionId>`

If the condition is based on **answer points**, the following is used:

`<questionId>.points`

If the question has to be answered but the answer to the question does not affect the logic but only THAT the question is answered:

`vars.<questionId>`

`vars.<questionId>.<responsId>`

Conditions can be based on dates. A date can come from three sources:

- Properties (`properties.creationDate, properties.startedDate, healthDataValue.date`)
- Answers to date questions, using the `questionId` of the date question.
- Static dates (using the syntax `date(YYYY-MM-DD)`.

Dates should have format YYYY-MM-DD.

To get days/months/years:

`day(someDate)`

`month(someDate)`

`year(someDate)`

To get the amount of days/weeks/months/years between to dates:

`days(someDate, someOtherDate)`

`weeks(someDate, someOtherDate)`

`months(someDate, someOtherDate)`

`years(someDate, someOtherDate)`

It is also possible to write conditions based on:

`systemBirthDate` (the birth date of the patient)

`systemAge` (the age of the patient)

`systemGender` (the gender of the patient)

Conditions can contain several validations and answers to previous questions or questionnaires where the following can be used to bind the conditions together and check the value:

Binding conditions:

`AND` = and

`OR` = or

What has to be fulfilled:

"`!=`" = not equal to

"==" = equal to

If no value can exist:

`null` = no value



NOTE
The `Free Text`, `Medication` and `File` question types cannot be used in conditions.

Question

The text that the patient sees in the patient app. The following `[... /...]` syntax can be used here to direct the question to the correct person seeking medical care which is [You /your child] by default.
This `[... /... /... /...]` syntax can also be used to direct the question based on answers to previous questions and properties. Enter the conditions in the "**Choose first [ ] alternative if**" to specify which of the options should be used.

Choose first [ ] alternative if

If a logic other than default `[You/Your child]` has to be used, other conditions can be used to control whether the first or second option in the syntax should be used.

For example, if the question:

““[Have the problems arisen/Did the problems arise] in connection with exposure to the cold?”"

is displayed in the “**Question**” field, the parameter `ongoing` has to be specified in the "**Choose first [ ] alternative if**” field, where "`ongoingAllergy`" is a parameter from a search term that accompanies the patient in their patient journey if they sought help e.g. for “Ongoing allergic reaction”" If `ongoingAllergy` exists, the first option in “`[ ]`” will be used, and if ongoing is not specified for the patient, the second option will be displayed in the question.



Medical term

The text that will be used in the automated summary of the interview and displayed in Clinic. See Automated summary [115] for more information.

Points (if answer is yes)

Points that can be set for Yes/No question types. The points are generated if a patient answers Yes to a question and this can be used in the questionnaire to calculate a total score or control other flows in the questionnaire.

Points (for response options)

For **Single choice** and **Multiple choice** question types, one or more response options must be added and points can be set for each answer option, which are then generated if the patient answered exactly with that answer in the interview.

Information

Information text that is displayed under a question if the questionnaire is sent from Clinic.

Explanation title

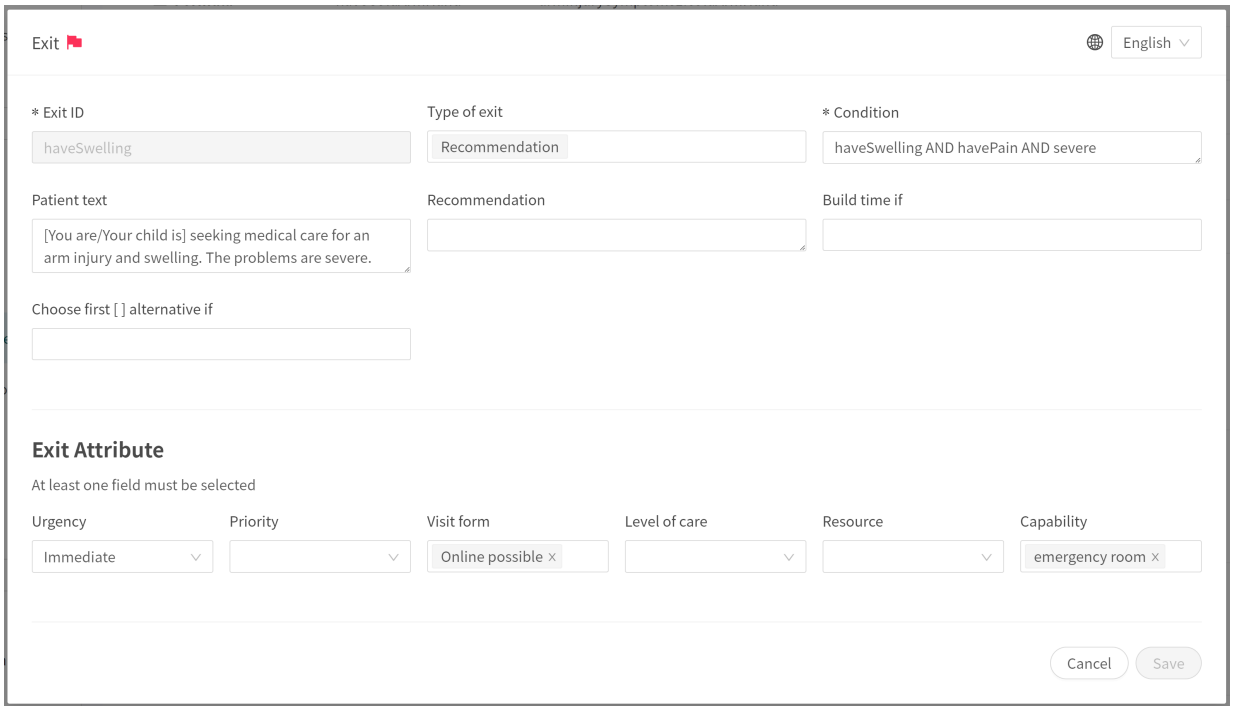
Information title that is displayed under a question if patients themselves search for the questionnaire using the Patient app. This text is clickable and leads to **Explanation text** (see below).

Explanation text

Information text that is displayed under a question if patients themselves search for the questionnaire using the Patient app. Displayed if a patient has clicked on the title (**Explanation title**).

9.5. Exits

Exits are used to define triage rules, and therefore **Urgency**, **Visit form**, **Level of care**, **Resource** and **Capability** recommended to patients based on interview answers.



Exits must always contain values for the following attributes:

- **Condition**
- **Exit ID**
- At least one of the following **Exit Attributes**:
  - **Urgency**
  - **Visit form**
  - **Level of care**
  - **Resource**
  - **Capability**

9.5.1. Attributes and values in exits

Exit ID

All exits are assigned an **ID**.

The **ID** needs to be in English and may contain the following characters (no special characters):

- a–z
- A–Z
- 0–9

Condition

Conditions for when an exit is activated for a patient. For example, if a specific answer to a question is to activate the exit.
If the condition is to validate that a patient has answered a certain answer, the following syntax is specified:

`<questionId>.<responsId>`

If the condition is to validate that a patient answered **Yes** (yes/no question) the following is used:

`<questionId>`

If the condition is to validate that the patient answered **No** (yes/no question) the following is used:

`NOT <questionId>`

If the condition is based on **answer points**, the following is used:

`<questionId>.points`

If the question has to be answered but the answer to the question does not affect the logic but only THAT the question is answered:

`vars.<questionId>`

`vars.<questionId>.<responsId>`

Conditions can be based on dates. A date can come from three sources:

- Properties (`properties.creationDate, properties.startedDate, healthDataValue.date`)
- Answers to date questions, using the `questionId` of the date question.
- Static dates (using the syntax `date(YYYY-MM-DD)`.

Dates should have format YYYY-MM-DD.

To get days/months/years:

`day(someDate)`

`month(someDate)`

`year(someDate)`

To get the amount of days/weeks/months/years between to dates:

`days(someDate, someOtherDate)`

`weeks(someDate, someOtherDate)`

`months(someDate, someOtherDate)`

`years(someDate, someOtherDate)`

It is also possible to write conditions based on:

`systemBirthDate` (the birth date of the patient)

`systemAge` (the age of the patient)

`systemGender` (the gender of the patient)

Conditions can contain several validations and answers to previous questions or questionnaires where the following can be used to bind the conditions together and check the value:

Binding conditions:

`AND` = and

`OR` = or

What has to be fulfilled:

" ! =" = not equal to

"==" = equal to

If no value can exist:

`null` = no value

It is important to have spaces between the first value, the minus sign and the next value to write a formula with subtraction (`-`). If this is not done, the formula is interpreted as a name instead of an equation.

- **OK**: `23 - someVariable`
- **Not OK:** `23-someVariable`



NOTE
The `Free Text`, `Medication` and `File` question types cannot be used in conditions.

Type of exit

Here the following types can be selected (numerous types can be selected)

- `Service request` – when a service request has to be created for a patient. An analysis is selected in "**Analyses**" field.
- `Recommendation` – when a patient should receive a recommendation about the next step, for instance booking an appointment.

If both `Service request` and `Recommendation` are selected, patients will receive the recommendation (for example, "Book an appointment") and a service request with listed tests.

Patient text

The text entered here will be displayed as the final chat bubble in the triage. This text often confirms what details the patient has provided.

Recommendation

A specific recommendation text based on a specific exit given to the patients in the recommendation page. If urgency level "**Wait**" is selected under the "**Recommendation**" exit type, this text is not displayed on the recommendation page but only when a patient clicks forward to read the self-care information.

Build time if

Build time if can be set for the following components in questionnaires and is used to decide if components should be included or not, based on formulas, properties and parameters. Refer to the Frequently occurring attributes [108] section for a longer description of **Build time if**:

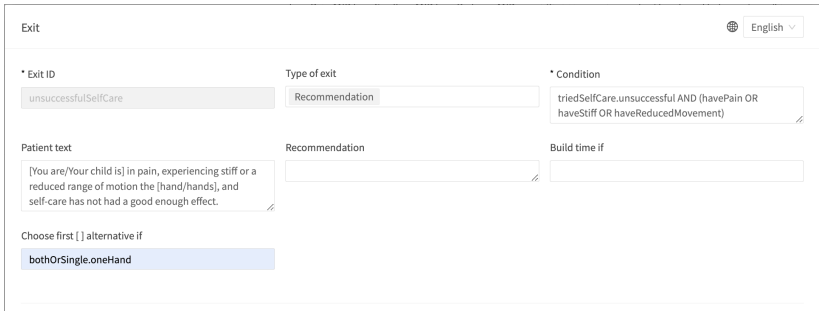
- **Include**
- **Exits**
- **Answer** (in questions)
- **Formulas**
- **Questions**
- **Go to another questionnaire**
- **Call questionnaire**

Choose first [ ] alternative if

If a logic other than default `[You/Your child]` has to be used, other conditions can be used to control whether the first or second option in the syntax should be used.

For example:

For the **Patient text** "`[You are/Your child is]` in pain, experiencing stiff or a reduced range of motion in the `[hand/hands]` and self-care has not had a good enough effect.", the parameter `bothOrSingle.oneHand` has to be specified in the **Choose first [ ] alternative if:** field, where `bothOrSingle.oneHand` is a parameter from a previous question that accompanies the patient in their patient journey. If `bothOrSingle.oneHand` exists, the first option in "`[ ]`" will be used, and `if ongoing` is not specified for the patient, the second option will be displayed to the patient.



Analyses

The "**Analyses**" field can be filled in if the **Service request type** is selected under **Type of exit**. This is a drop-down list with selectable analyses for which a **Service request** can be sent. Select one or more.

Exit attributes

The **Exit attributes** section can be displayed if the **Recommendation type** is selected under **Type of exit**. Attributes that will be generated if the patient ends up in this exit are shown in this section.

Exit attributes are important input to the rule engine which performs the routing of the patient and generates the recommendation pages. In addition, the exit attributes are also an important input to, for example, what care unit and role the patient is routed to. Therefore, adding, updating or deleting exit attributes must be made with caution and with a good understanding on the effect of the change. It is also very important to test the changes thoroughly before releasing them into production. There are separate test instructions supplied by Platform24. Contact your Customer Success Manager if you wish to receive the test instructions.

The exit attributes listed below are examples.

Urgency

- **Immediate**
- **Promptly**
- **Acute**
- **Planned**
- **Wait**

Visit form

- **Online recommended** – if patient will receive an online recommendation
- **Online possible** – if patient is offered choice to go online as a secondary recommendation
- If value is not selected here, the patient is recommended offline care

Level of care

- **Stop**
- **Online**
- **Hotline**
- **Primary care**
- **Specialist care**
- **Emergency**
- **Previous clinic**
- **Self-care**

Resource

Customers can choose to add their own resources by contacting their implementation manager (PSM) at Platform24. The added resources will have a green asterisk next to their name to indicate that they are customer-specific.

These are the resources that come with and can be used in the system:

- Occupational therapist
- Paediatrician
- Midwife

- Biomedical analyst
- Dermatologist
- Dietician
- Pharmacist
- Physiotherapist
- Health scientist
- Counsellor
- Speech therapist
- Doctor
- Medical administrator
- Optician
- Orthopaedist
- Personal trainer
- Psychiatrist
- Psychologist
- Rehab Coordinator
- Nurse
- Dentist
- Therapist
- Assistant nurse
- Care Coordinator
- Ophthalmologist

Capability

Customers can choose to add their own capabilities by contacting their implementation manager (PSM) at Platform24. The added capabilities will have a green asterisk next to their name to indicate that they are customer-specific.

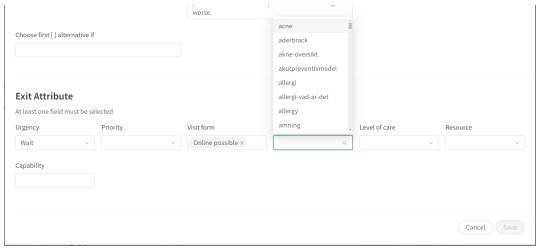
These are the capabilities that come with and can be used in the system:

- addiction
- antenatal
- child health center
- dental
- emergency hotline
- emergency room
- general practice
- guidance hotline
- gynecology
- home care
- infection
- maternity

- obstetrics
- ophthalmology
- optometry
- poisoning
- personal training
- physiotherapy
- psychiatry
- psychiatric hotline
- psychology
- youth

Self-care advice

If the urgency level "**Wait**" is selected, an **Selfcare advice** field is displayed under the exit attributes. Self-care information that exists and has been created in the solution can be selected in the drop-down list. This is then the self-care advice patients will receive if they meet the condition for this exit.



9.5.2. Exit care advice

NOTE

This feature is optional and only available for customers who have activated it.

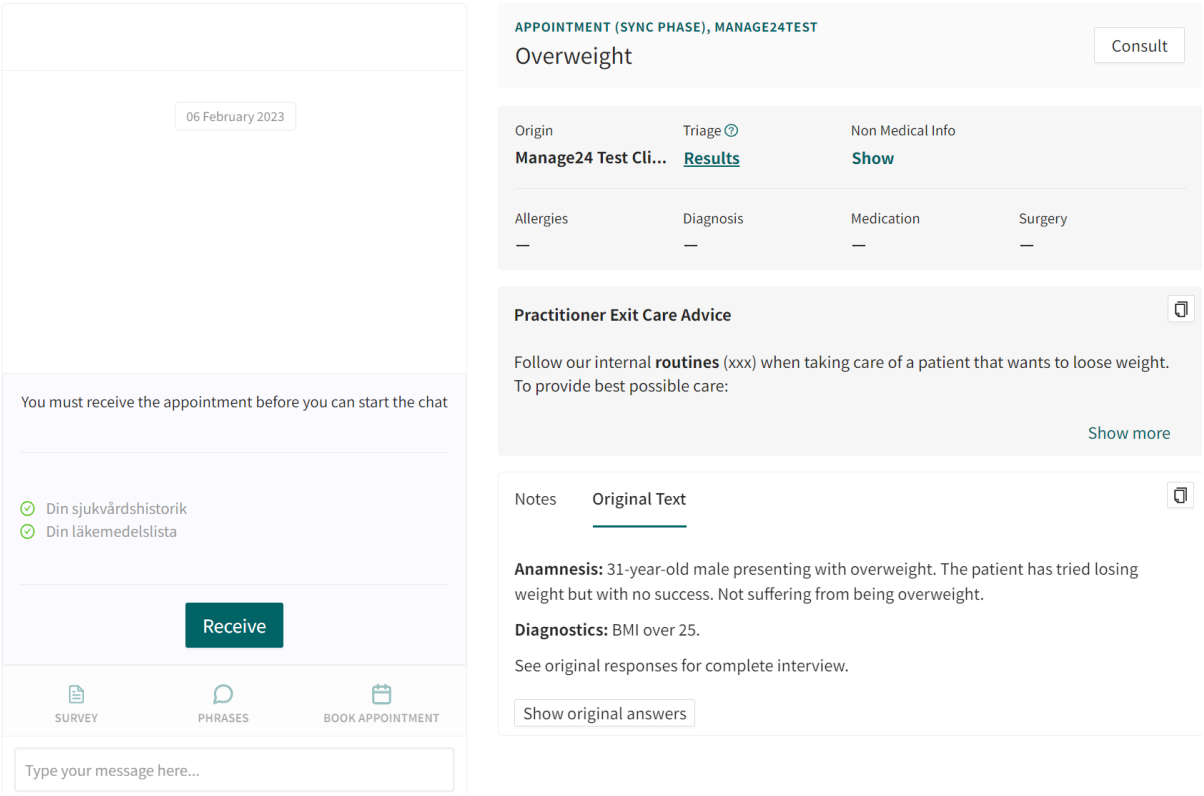
Contact your superuser or Customer Success Manager for further information.

To give further information to healthcare professionals about a specific exit, the free text field **Exit Care Advice** is used. The exit care advice is shown to practitioners in the Clinic patient view of the triage results. The advice does not affect the triage logic or the exit.

The exit care advice is a free-text field on the exit statement in the medical content, and intends to guide patients to the right level of care by giving the practitioner additional information based on the exit level. The exit care advice is shown for practitioners in Clinic, if the patient exited on an exit with a defined exit care advice.

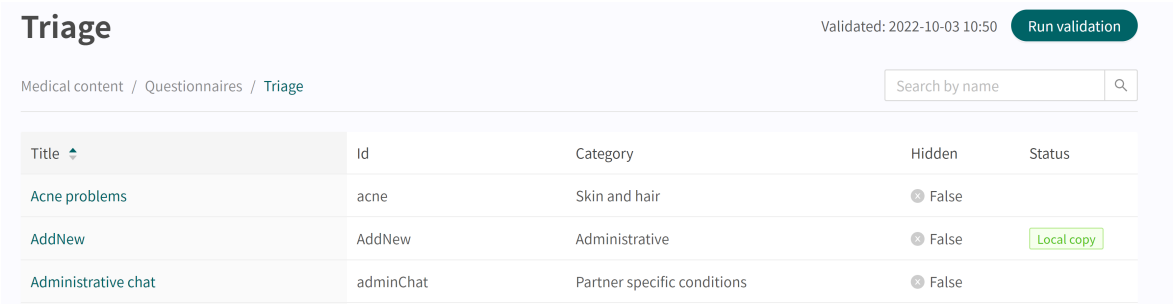
Example of exit care advice: "*The patient is suitable for an appointment with an orthopedist with a previous MR examination.*"

NOTE
Exit care advice must NOT be used to diagnose or to recommend a specific drug for one or more patients.

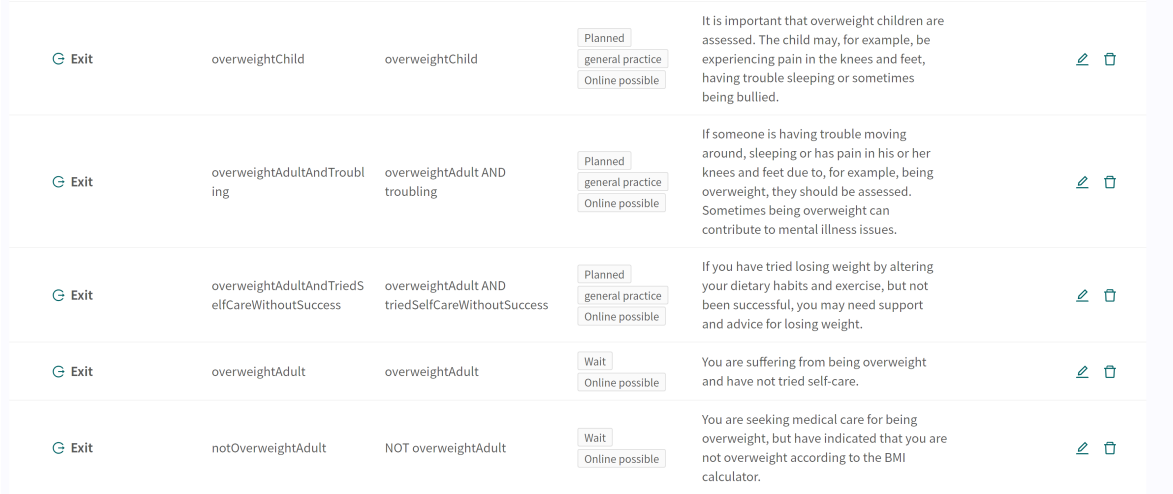


How to create an exit care advice

1. Select the questionnaire where the exit is defined or is going to be created by clicking the questionnaire title.

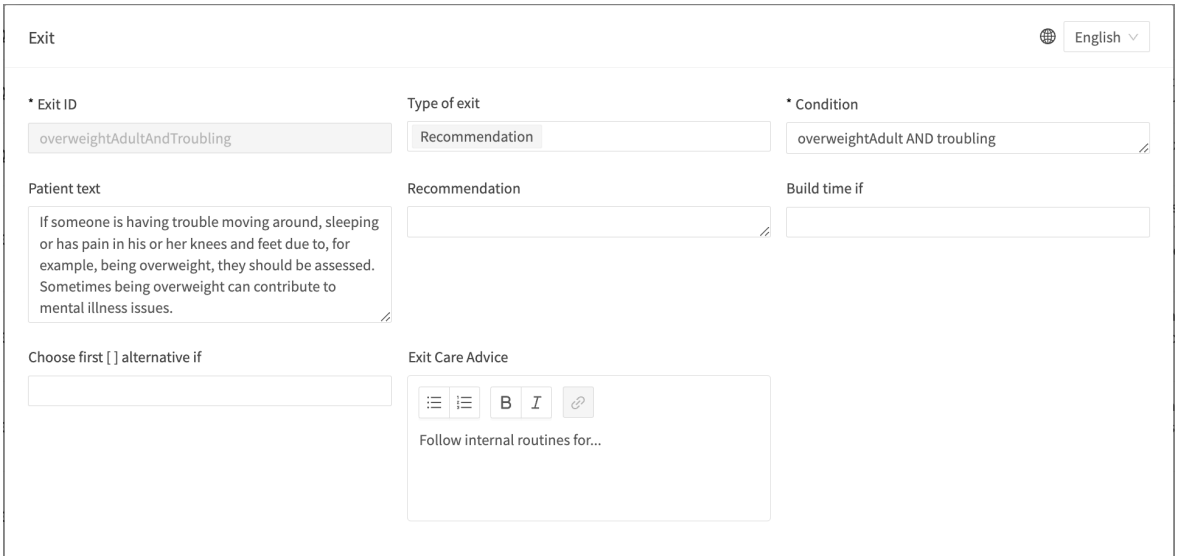


2. Select the Exit where you wish to add the exit care advice by clicking the title. You can also create a new exit.

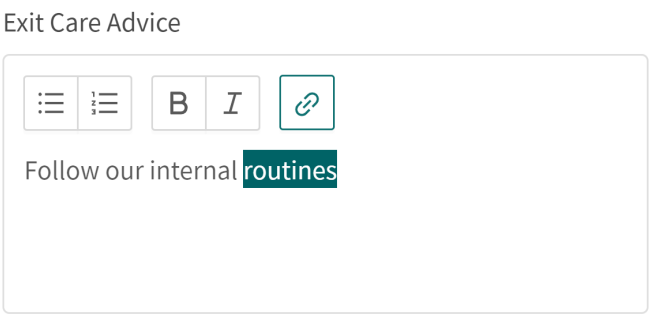


Exit	overweightChild	overweightChild	Planned general practice Online possible	It is important that overweight children are assessed. The child may, for example, be experiencing pain in the knees and feet, having trouble sleeping or sometimes being bullied.	
Exit	overweightAdultAndTroubling	overweightAdult AND troubling	Planned general practice Online possible	If someone is having trouble moving around, sleeping or has pain in his or her knees and feet due to, for example, being overweight, they should be assessed. Sometimes being overweight can contribute to mental illness issues.	
Exit	overweightAdultAndTriedSelfCareWithoutSuccess	overweightAdult AND triedSelfCareWithoutSuccess	Planned general practice Online possible	If you have tried losing weight by altering your dietary habits and exercise, but not been successful, you may need support and advice for losing weight.	
Exit	overweightAdult	overweightAdult	Wait Online possible	You are suffering from being overweight and have not tried self-care.	
Exit	notOverweightAdult	NOT overweightAdult	Wait Online possible	You are seeking medical care for being overweight, but have indicated that you are not overweight according to the BMI calculator.	

3. Write the advice in the free text field **Exit Care Advice**. It is possible to format the exit care advice text by using the toolbox in the text field.



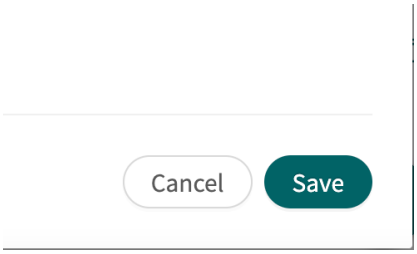
4. It is possible to add a link to the exit care advice.
   a. Highlight the part of the text you want to connect the link to, and click on the link icon.



b. Paste the link into the **Value** field in the pop-up and click on "**Save**".



5. Finish adding the advice by clicking the **Save** button.



9.5.3. Breaking exits

If urgency level "**Immediate**" is set for a "**Recommendation**" exit type, for example in a questionnaire for an ongoing chest pain, the exit will break the process. This means that if a user meets the **Exit condition**, the interview is immediately cancelled and the user is taken to the recommendation page straightaway, without having to answer the remaining questions in the questionnaire.

The questionnaire is cancelled even if a "**Stop**" level of care is set for an Exit.

9.5.4. Default exits

Default exits are exits that are unconditional. If conditions are not specified for an **Exit**, any patient journeys not identified by the other previous Exits in triage will end up in this **Exit**. It is only possible to have one exit for each questionnaire that is unconditional. These exits are used as a backup to ensure patients always receive a recommendation.

9.6. Formulas

A formula is a complex expression of normally several, longer expressions (e.g., answers to questions). Formulas can also be used to create calculations for assessments.

When a **Formula** is set, it can be used again in the questionnaire, for example as a question condition to avoid a repeat of all expressions.

Formulas must always contain values for following attributes:

- **Formula ID**
- **Condition**

9.6.1. Attributes and values in Formulas

Formula ID All formulas have an **ID**.
The **ID** needs to be in English and may contain the following characters (no special characters):

- a–z
- A–Z
- 0–9

Condition

Conditions for when formulas are activated for a patient. For example, if a specific answer to a question is to activate the formula. The **Formula ID** can then be used again in the questionnaire.
If the condition is to validate that a patient has answered a certain answer, the following syntax is specified:

```
<questionId>.<responsId>
```

If the condition is to validate that a patient answered **Yes** (yes/no question) the following is used:

```
<questionId>
```

If the condition is to validate that the patient answered **No** (yes/no question) the following is used:

```
NOT <questionId>
```

If the condition is based on **answer points**, the following is used:

```
<questionId>.points
```

If the question has to be answered but the answer to the question does not affect the logic but only THAT the question is answered:

```
vars.<questionId>
```

```
vars.<questionId>.<responsId>
```

Conditions can be based on dates. A date can come from three sources:

- Properties (`properties.creationDate`, `properties.startedDate`, `healthDataValue.date`)
- Answers to date questions, using the `questionId` of the date question.
- Static dates (using the syntax `date(YYYY-MM-DD)`.

Dates should have format YYYY-MM-DD.

To get days/months/years:

```
day(someDate)
```

```
month(someDate)
```

```
year(someDate)
```

To get the amount of days/weeks/months/years between to dates:

```
days(someDate, someOtherDate)
```

```
weeks(someDate, someOtherDate)
```

```
months(someDate, someOtherDate)
```

```
years(someDate, someOtherDate)
```

It is also possible to write conditions based on:

`systemBirthDate` (the birth date of the patient)

`systemAge` (the age of the patient)

`systemGender` (the gender of the patient)

Conditions can contain several validations and answers to previous questions or questionnaires where the following can be used to bind the conditions together and check the value:

Binding conditions:

`AND` = and

`OR` = or

What has to be fulfilled:

"`!=`" = not equal to

"`==`" = equal to

If no value can exist:

`null` = no value

It is important to have spaces between the first value, the minus sign and the next value to write a formula with subtraction (`-`). If this is not done, the formula is interpreted as a name instead of an equation.

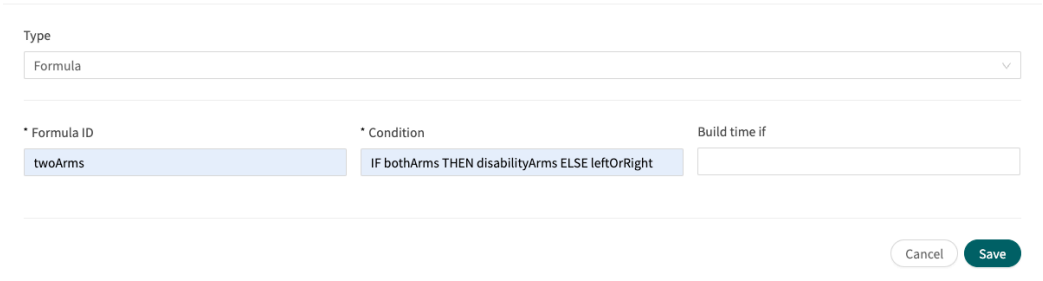
- **OK**: `23 - someVariable`
- **Not OK:** `23-someVariable`

`If Then Else` conditions

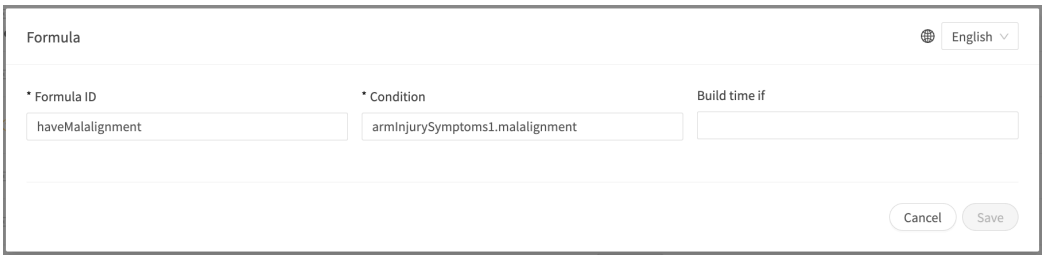
```
IF someVariable THEN someValue ELSE someOtherValue
```

If the condition `someVariable` is met, `someValue` will be used, but if the condition `someVariable` isn't met, `someOtherValue` will be used.

Example:

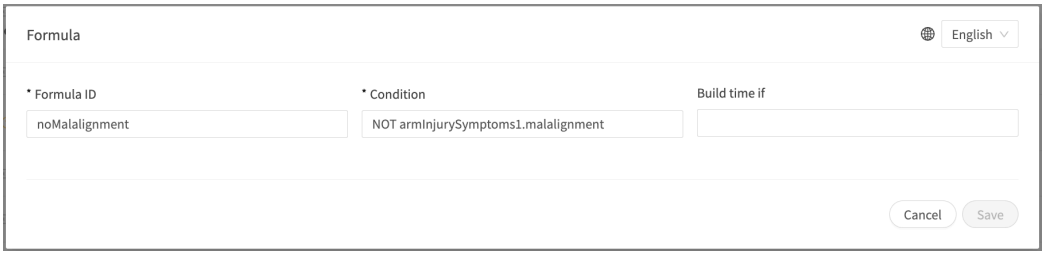


NOTE
The `Free Text`, `Medication` and `File` question types cannot be used in conditions.



In the above expression, laterality is the question's ID, and left and right are the answer's ID in the question you want to include.

Answers can also be negated in a formula.



Where **Formula Id** = `isNotItching`

Condition = `NOT allergySymptoms.itching AND properties.itching == null`

Here the user must not have answered itching on the question `allergySymptoms`, hence the `NOT` is written, and the property `itching`, which comes from a search term, is not true i.e. `== null`.



NOTE

- Formulas cannot be negated, meaning `NOT unilateralSymptoms` **cannot** be written. A new formula could be created instead called `notUnilateralSymptoms = NOT laterality.left AND NOT laterality.right`.
- Note also that Formulas are not included when a user goes to another questionnaire.

9.7. Include

Used to include (drag in) a question or a completely different library, in the questionnaire in question.

The aim here is to avoid duplicates of questions and answers.

9.7.1. Attributes and values in Include

Include library	Drop-down list of existing libraries that can be included.
Question	Drop-down list where a specific question can be selected to be included or all questions are selected. Only one selection can be made in the list.

Build time if

Build time if can be set for the following components in questionnaires and is used to decide if components should be included or not, based on formulas, properties and parameters. Refer to the Frequently occurring attributes [108] section for a longer description of **Build time if**:

- **Include**
- **Exits**
- **Answer** (in questions)
- **Formulas**
- **Questions**
- **Go to another questionnaire**
- **Call questionnaire**

Condition

Conditions for when a component has to be activated for the patient. For example, if the option that an answer to a question is required before the next one is asked has been selected to include another questionnaire.

If the condition is to validate that a patient has answered a certain answer, the following syntax is specified:

`<questionId>.<responsId>`

If the condition is to validate that a patient answered **Yes** (yes/no question) the following is used:

`<questionId>`

If the condition is to validate that the patient answered **No** (yes/no question) the following is used:

`NOT <questionId>`

If the condition is based on **answer points**, the following is used:

`<questionId>.points`

If the question has to be answered but the answer to the question does not affect the logic but only THAT the question is answered:

`vars.<questionId>`

`vars.<questionId>.<responsId>`

Conditions can be based on dates. A date can come from three sources:

- Properties (`properties.creationDate`, `properties.startedDate`, `healthDataValue.date`)
- Answers to date questions, using the `questionId` of the date question.
- Static dates (using the syntax `date(YYYY-MM-DD)`.

Dates should have format YYYY-MM-DD.

To get days/months/years:

`day(someDate)`

`month(someDate)`

`year(someDate)`

To get the amount of days/weeks/months/years between to dates:

`days(someDate, someOtherDate)`

`weeks(someDate, someOtherDate)`

`months(someDate, someOtherDate)`

`years(someDate, someOtherDate)`

It is also possible to write conditions based on:

`systemBirthDate` (the birth date of the patient)

`systemAge` (the age of the patient)

`systemGender` (the gender of the patient)

Conditions can contain several validations and answers to previous questions or questionnaires where the following can be used to bind the conditions together and check the value:

Binding conditions:

`AND` = and

`OR` = or

What has to be fulfilled:

"`!=`" = not equal to

"`==`" = equal to

If no value can exist:

`null` = no value

It is important to have spaces between the first value, the minus sign and the next value to write a formula with subtraction (`-`). If this is not done, the formula is interpreted as a name instead of an equation.

- **OK**: `23 - someVariable`
- **Not OK:** `23-someVariable`



NOTE
The `Free Text`, `Medication` and `File` question types cannot be used in conditions.



NOTE
A library can only be included once per questionnaire. If, on the other hand, the condition for including a library is not met, a library that meets another condition can be included in the same form.

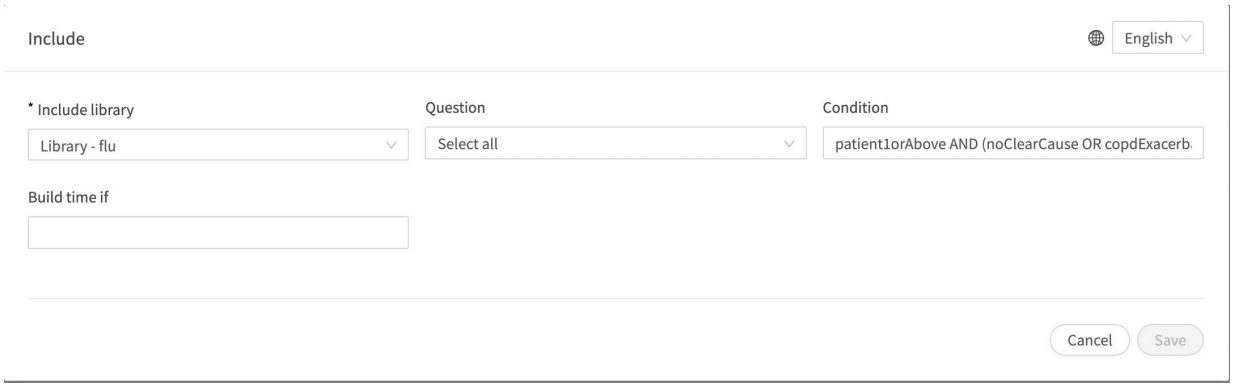
It is possible to set **Condition** and **Build time if** to define when the **Include library** statement should be activated. This is done, for instance, to prevent all users in the main questionnaire receiving the questions that are in the included library or questionnaire.



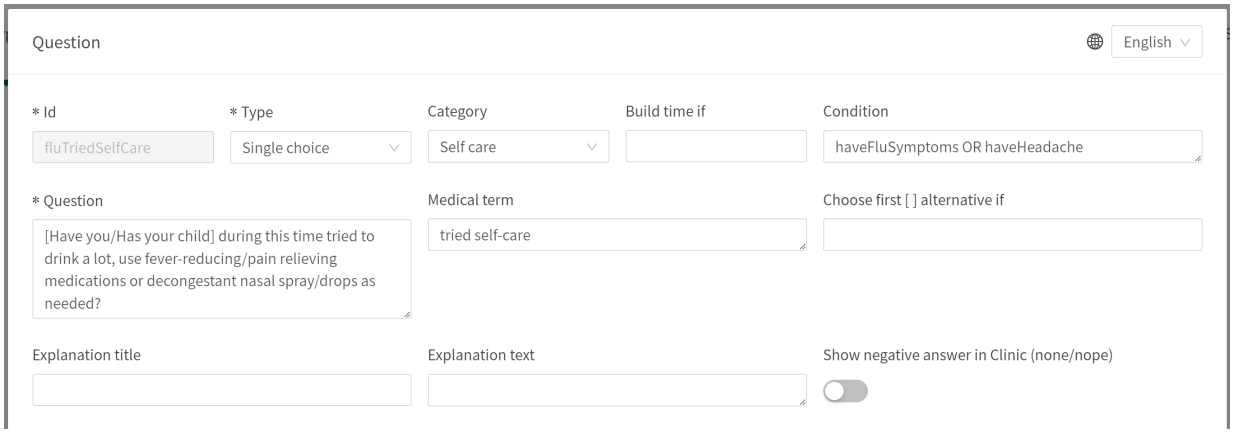
The library, or the question from a library, that is included in a questionnaire will inherit the condition that led to the library being included. This means that when the library is included in the questionnaire, the previously fulfilled conditions will be merged with the new conditions that are added in connection with questions in the included library.

Examples of when the terms for the include are merged with the terms for the question in the included library:

The cough questionnaire has the following include:



`libraryFlu` has a question with the following conditions:



When `libraryFlu` is included in cough These two conditions will be merged, leading to the question `fluTriedSelfCare` to be asked if the following condition is met:

```
(haveFluSymptoms OR haveHeadache) AND (patient1orAbove AND (noClearCause OR
copdExacerbation.none))
```

However, the condition in **Include** is not merged with the condition for the outcome in the included file.

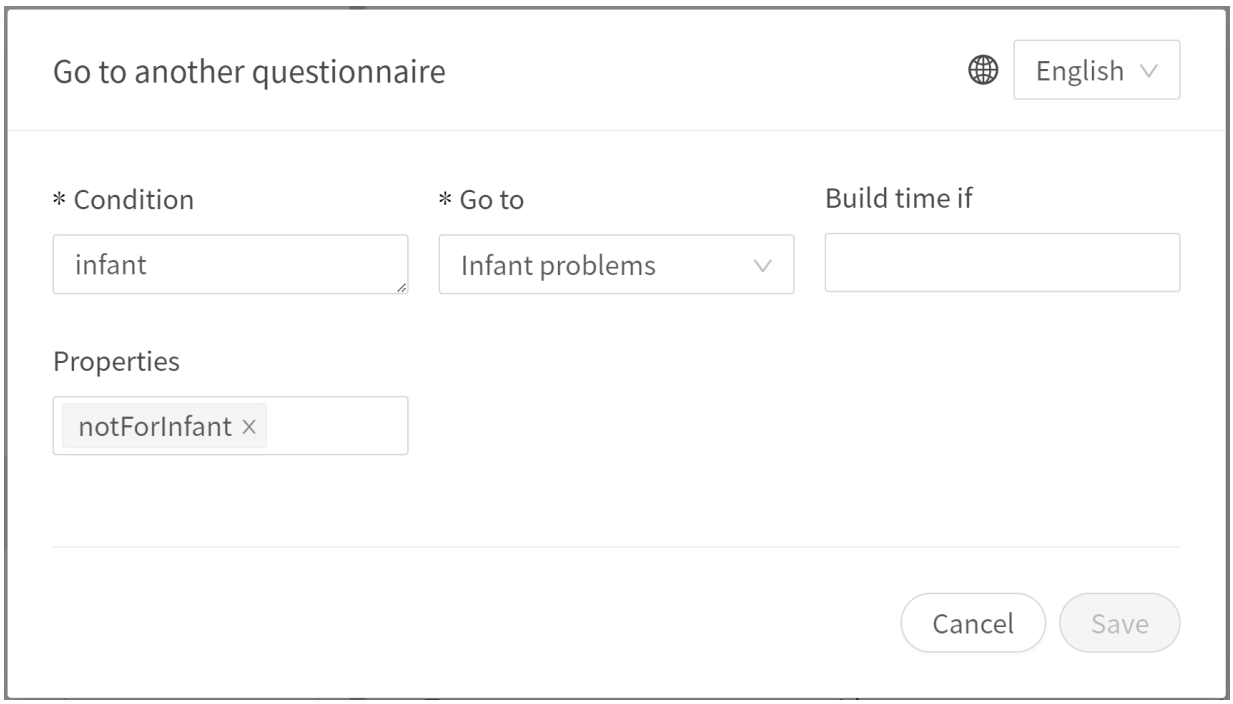
9.8. Go to another questionnaire

Skip to an entirely different questionnaire as soon as the conditions for the component are met. Patients then do not return to the first questionnaire.

Go to another questionnaire must always contain attribute values:

```
If (conditions to be met e.g. believeAllergy AND triedSelfCareSuffix.unsuccessful)
   Go to (name of the questionnaire skipped to e.g. Suspected allergy)
```

9.8.1. Attributes and values in Go to another questionnaire



Condition

Conditions for when a component has to be activated for the patient. For example, if the option that an answer to a question is required before the next one is asked has been selected to **Go to another questionnaire**.

If the condition is to validate that a patient has answered a certain answer, the following syntax is specified:

```
<questionId>.<responsId>
```

If the condition is to validate that a patient answered **Yes** (yes/no question) the following is used:

```
<questionId>
```

If the condition is to validate that the patient answered **No** (yes/no question) the following is used:

`NOT <questionId>`

If the condition is based on **answer points**, the following is used:

`<questionId>.points`

If the question has to be answered but the answer to the question does not affect the logic but only THAT the question is answered:

`vars.<questionId>`

`vars.<questionId>.<responsId>`

Conditions can be based on dates. A date can come from three sources:

- Properties (`properties.creationDate, properties.startedDate, healthDataValue.date`)
- Answers to date questions, using the `questionId` of the date question.
- Static dates (using the syntax `date(YYYY-MM-DD)`.

Dates should have format YYYY-MM-DD.

To get days/months/years:

`day(someDate)`

`month(someDate)`

`year(someDate)`

To get the amount of days/weeks/months/years between to dates:

`days(someDate, someOtherDate)`

`weeks(someDate, someOtherDate)`

`months(someDate, someOtherDate)`

`years(someDate, someOtherDate)`

It is also possible to write conditions based on:

`systemBirthDate` (the birth date of the patient)

`systemAge` (the age of the patient)

`systemGender` (the gender of the patient)

Conditions can contain several validations and answers to previous questions or questionnaires where the following can be used to bind the conditions together and check the value:

Binding conditions:

`AND` = and

`OR` = or

What has to be fulfilled:

"`!=`" = not equal to

"==" = equal to

If no value can exist:

`null` = no value

It is important to have spaces between the first value, the minus sign and the next value to write a formula with subtraction (`-`). If this is not done, the formula is interpreted as a name instead of an equation.

- **OK**: `23 - someVariable`
- **Not OK:** `23-someVariable`

> **NOTE**
> The `Free Text`, `Medication` and `File` question types cannot be used in conditions.

Go to Drop-down list where another questionnaire can be selected which the patient will answer instead.

Build time if **Build time if** can be set for the following components in questionnaires and is used to decide if components should be included or not, based on formulas, properties and parameters. Refer to the Frequently occurring attributes [108] section for a longer description of **Build time if**:

- **Include**
- **Exits**
- **Answer** (in questions)
- **Formulas**
- **Questions**
- **Go to another questionnaire**
- **Call questionnaire**

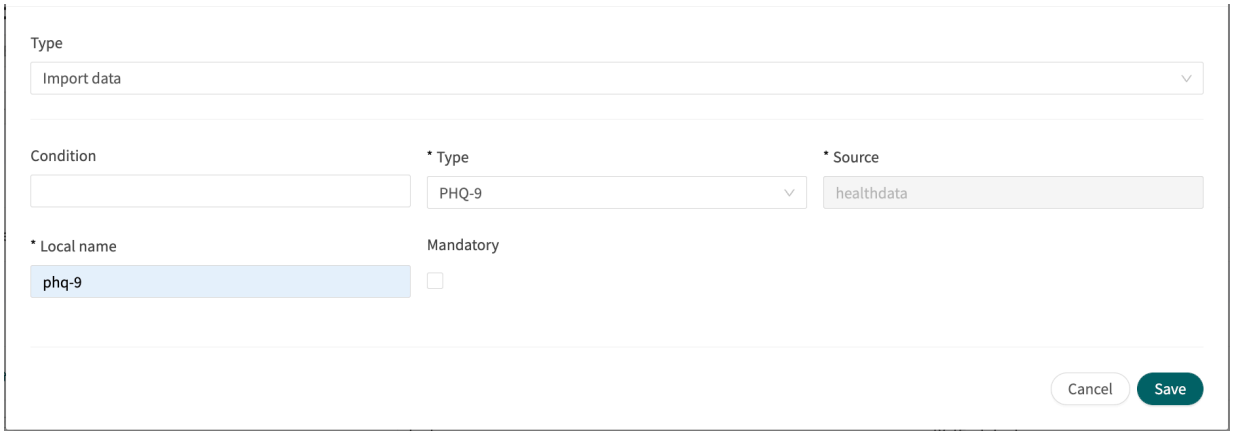
Properties Properties can be set when you **Go to** another questionnaire to include the required properties in the next questionnaire.

> **NOTE**
> Formulas are not included when Skipping to other questionnaire, while Properties are included.
>
> Properties can, for instance, be used when a user has already answered a question about where an injury is and then does not have to answer the same question again when the user has gone to another questionnaire

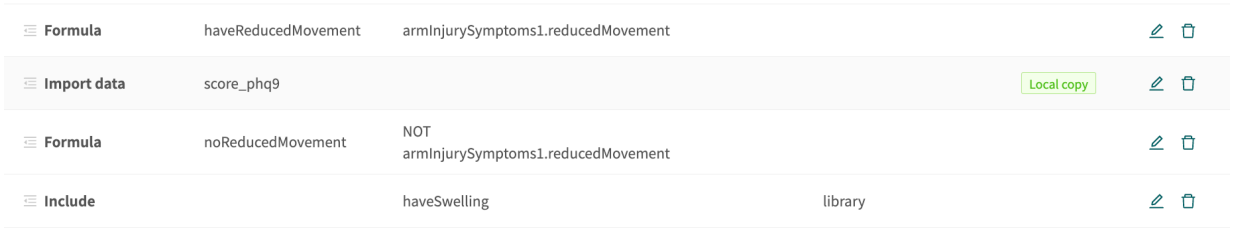
9.9. Import data

Import data is a statement that can be used in questionnaires where logic has to be based on values in the health database for patients. The value retrieved from the health database can then

be checked with different conditions to drive logic in the patient flow. It is possible to write conditions that define if the value is greater or less than X. It is possible to drive logic based on how old the result is, i.e. when it was added to the health database. It is also possible to create different types of equations using the value that can drive logic.



Examples of data imports that can be carried out in questionnaires are the importing of values from analyses (lab) conducted for patients and then defining when results are still valid or not in formulas. There may for instance be formulas that indicate how old the test may be, what the result was or if there is a value or not. In the continuation of the questionnaire, the formula is then used to drive logic for the questions and exits that the patient receives.



The following checks on results from Importing data can be conducted (the tsh test example):

- `tsh.ageInDays` – to import number of days since the test was done
- `tsh.value` – to import test result

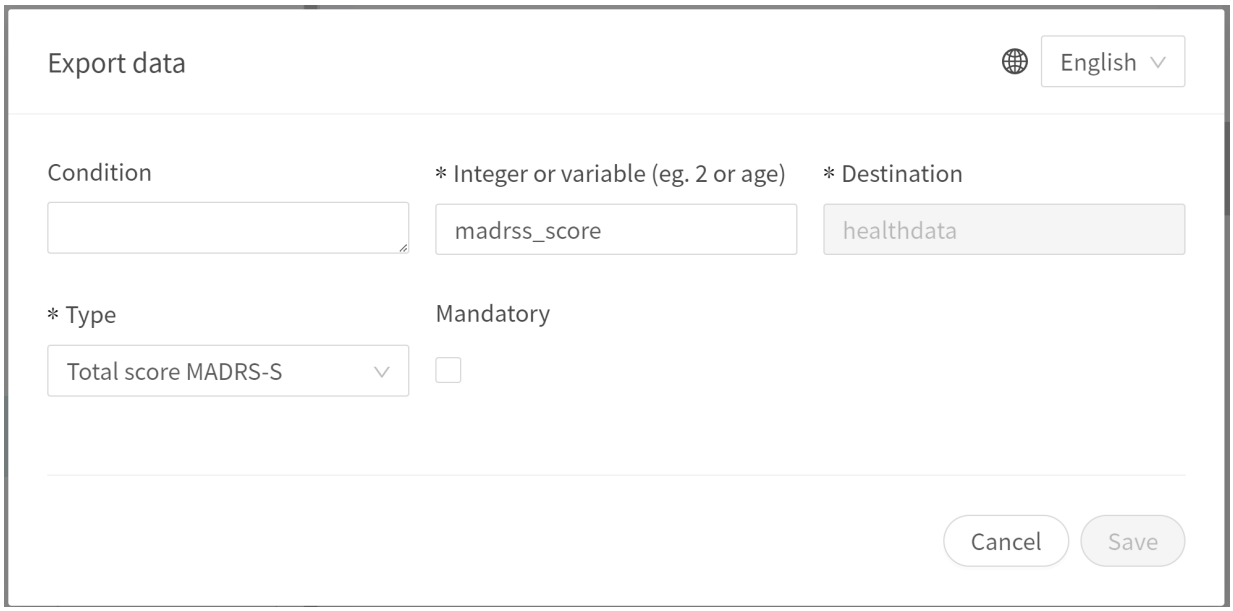
Greater than (>), less than (<), not equal to (!=), equal to (==) can be checked for both call-ups.

9.9.1. Attributes and values in Import data

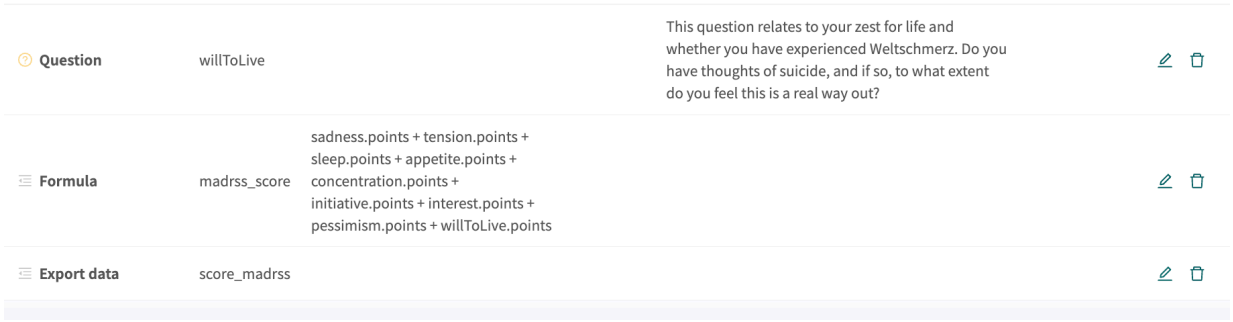
Condition	Conditions for when importing data from selected source.
Type	Drop-down list with selectable values to import from specified source.
Source	The database from which values are imported.
Local name	Imported values can be given a local value name for reuse in the questionnaire under conditions. For example, P-glucose can have the local name: glucose to simplify using the value.
Mandatory	Check box indicating whether a value has to be imported from the database.

9.10. Export data

Export data is a component used in questionnaires to export values to the health database. The exported values can then be used for visualizations in Clinic (trends, etc.) and to support returning cases for patients.



An example is where answers provided by patients in assessments are converted into a formula and exported to the health database.



9.10.1. Attributes and values in Exporting data

Condition Conditions for when exporting data to the health database.

Local name The formula or value that is given in the questionnaire and which is exported to the database. The **Local name** component will only accept allowed values for the specific Type. The statement will guide what type of value is expected, e.g., integer, decimal or Snomed CT code.

Destination The database to which values are exported. Only one database can be currently selected.

Type Drop-down list with selectable values to export to the database.

Mandatory Check box indicating whether a value has to be exported to the database in order for the questionnaire to be valid for patients to complete.

9.11. Call questionnaire

Used to Include a library questionnaire, but with the option of specifying parameters (properties) that control the included questionnaire assuming the **Parameter**.

9.11.1. Attributes and values in Call questionnaire

Call library Drop-down list with libraries that can be used.

Parameters The parameters required to be sent to the included library. At least one parameter must be specified to use the component. More than one parameter can be added. Ensure that the parameter is used in the included questionnaire.

Condition Conditions for when a library is included with the specified parameters.

Build time if **Build time if** can be set for the following components in questionnaires and is used to decide if components should be included or not, based on formulas, properties and parameters. Refer to the Frequently occurring attributes [108] section for a longer description of **Build time if**:

- **Include**
- **Exits**
- **Answer** (in questions)
- **Formulas**
- **Questions**
- **Go to another questionnaire**
- **Call questionnaire**

For example, in the **Shoulder** problems questionnaire, the **Pain** library, where the `assumePain` parameter is sent, has the following call-ups which impacts on how the questions in the library are asked. A component condition is also set, which steers the logic if the component will be activated for the patient.



9.12. Flags

The flag component displays additional information to a healthcare professional when a patient fulfills certain answers. In Content Studio+, the medical content developers can add one or more flags in questionnaires. A flag can be seen by the practitioner in Clinic if the patient, in the triage, fulfills the conditions of that flag.

The flag will not change the interview exit attributes in the rule engine. However, the flag can be used in the rule engine to adjust the recommendation to the patient after the triage.

Flags have two use cases:

- To guide patients to the right level of care by highlighting/flagging important information to the practitioner that has been gathered in the triage.
- To use flags in the rule engine to enhance the recommendation of care for the patient.

Example of use case for Flags: "*You have an ongoing COVID-19 infection and it is important to be aware of current guidelines. Read more about testing and isolation at Folkhälsomyndigheten.*"

NOTE
Flags must NOT be used to diagnose (including making statements of a diagnostic nature) or to recommend treatment for an individual patient. Flags are to be used at a common level and applied to a group of patients.

9.12.1. Attributes and values in flags

Condition

Conditions for when a component has to be activated for the patient. For example, if the option that a response to a question is required before the next one is asked has been selected to activate and display flags in Clinic.

If the condition is to validate that a patient has answered a certain answer, the following syntax is specified:

```
<questionId>.<responsId>
```

If the condition is to validate that a patient answered **Yes** (yes/no question) the following is used:

```
<questionId>
```

If the condition is to validate that the patient answered **No** (yes/no question) the following is used:

```
NOT <questionId>
```

If the condition is based on **answer points**, the following is used:

```
<questionId>.points
```

If the question has to be answered but the answer to the question does not affect the logic but only THAT the question is answered:

```
vars.<questionId>
```

```
vars.<questionId>.<responsId>
```

Conditions can be based on dates. A date can come from three sources:

- Properties (`properties.creationDate, properties.startedDate, healthDataValue.date`)
- Answers to date questions, using the `questionId` of the date question.
- Static dates (using the syntax `date(YYYY-MM-DD)`.

Dates should have format YYYY-MM-DD.

To get days/months/years:

```
day(someDate)
```

```
month(someDate)
```

```
year(someDate)
```

To get the amount of days/weeks/months/years between to dates:

```
days(someDate, someOtherDate)
```

```
weeks(someDate, someOtherDate)
```

```
months(someDate, someOtherDate)
```

```
years(someDate, someOtherDate)
```

It is also possible to write conditions based on:

`systemBirthDate` (the birth date of the patient)

`systemAge` (the age of the patient)

`systemGender` (the gender of the patient)

Conditions can contain several validations and answers to previous questions or questionnaires where the following can be used to bind the conditions together and check the value:

Binding conditions:

`AND` = and

`OR` = or

What has to be fulfilled:

"`!=`" = not equal to

"==" = equal to

If no value can exist:

`null` = no value

It is important to have spaces between the first value, the minus sign and the next value to write a formula with subtraction (`-`). If this is not done, the formula is interpreted as a name instead of an equation.

- **OK**: `23 - someVariable`
- **Not OK:** `23-someVariable`



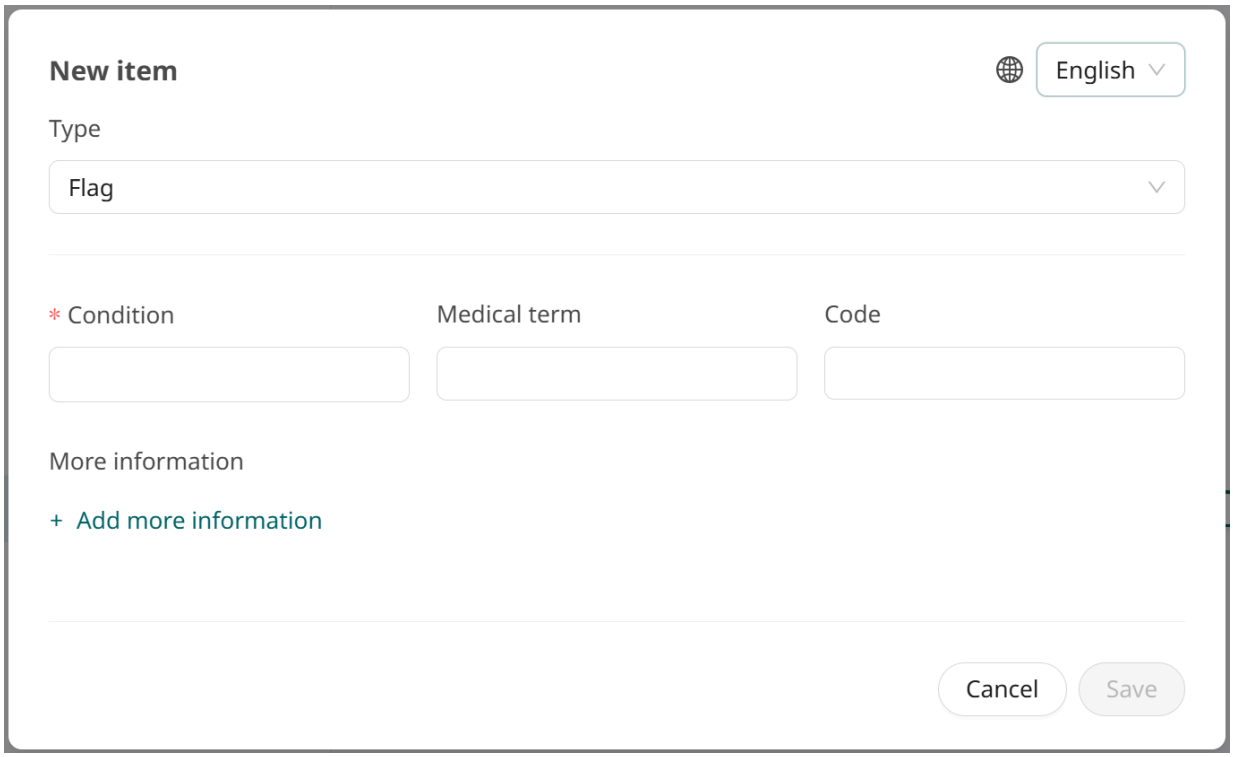
NOTE
The `Free Text`, `Medication` and `File` question types cannot be used in conditions.

Medical term Flag text displayed to healthcare practitioners in Clinic for patients who have fulfilled the flag condition (see **Condition**).

Code A code that can be specified if applying additional logic to the business rules.

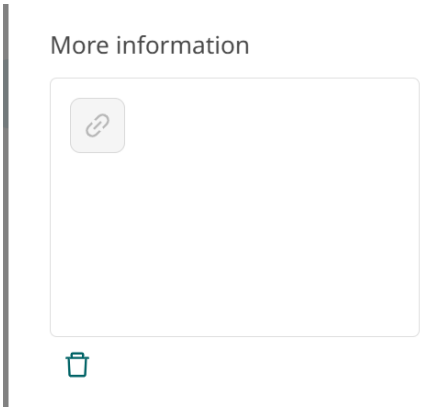
More information A field where more information including external links can be added to the flag.

Flags are only displayed to healthcare professionals in Clinic and do not in themselves affect exits.

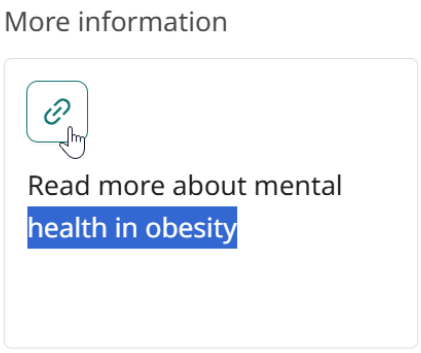


To add text and a link to a flag in the **More information** field:

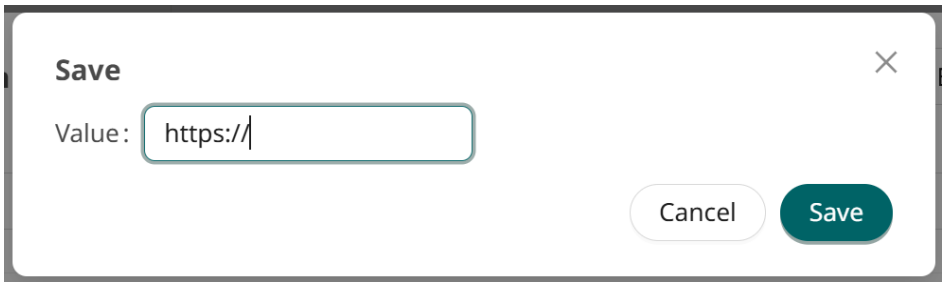
1. Click **+ Add more information** to expand this field.



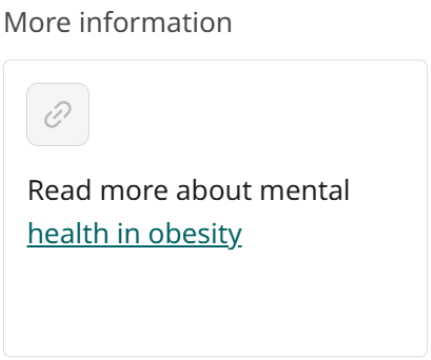
2. Add the desired text to the field.
3. Highlight the text that should be a link and click the link icon.



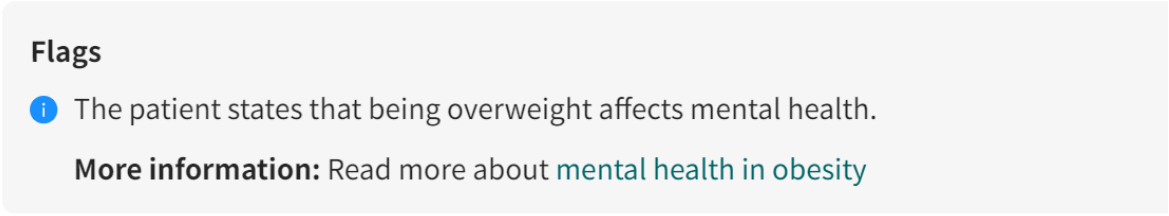
4. Enter the link address in the **Value** field and click **Save**.



Result: The link will be highlighted in the flag.



This is what the flag will look like in Clinic:



10. Frequently occurring attributes

Certain attributes and values occur in several different questionnaire components. A more detailed description of what this entails is shown below.

10.1. ID

Formulas, components, response options etc. have an ID that is used to drive logic.

The **ID** needs to be in English and may contain the following characters (no special characters):

- a–z
- A–Z
- 0–9

Numbers, 0-9, may be used in Question and Formula IDs. Other IDs use only letters.

This type of ID may be used for self-care information IDs.

10.2. Patient

The questions that patients see in the patient app can be formatted according to the following options and commands:

- `\n\n` = line break
- `*italic*` = italic
- `**bold**` = bold
- `\n\n*` = bullet point list
- `\n\n**1.Text...\n\n**2.Text\n\n**3.Text...\n\n*` = bullet point list with numbers.

10.3. Build time if

Build time if can be set for the following components in a questionnaire:

- **Include**
- **Exits**
- **Answer** (in questions)
- **Formulas**
- **Questions**
- **Go to another questionnaire**
- **Call questionnaire**

Libraries contain questionnaire components that are used in most medical content questionnaires. These are grouped in different **Libraries**.

To use a library for more than one medical condition, variations to the library's questionnaire components are permitted using the **Build time if** parameter.

An example is the "`libraryFeverSimple`" library where the first question asks patents if they have a fever and/or chills.

If patients are actually seeking medical care for a fever, it is not a good idea to ask that question.

To prevent this, the "`feverCondition`" questionnaire begins with a formula that states whether the patient thinks or knows that they have a fever:

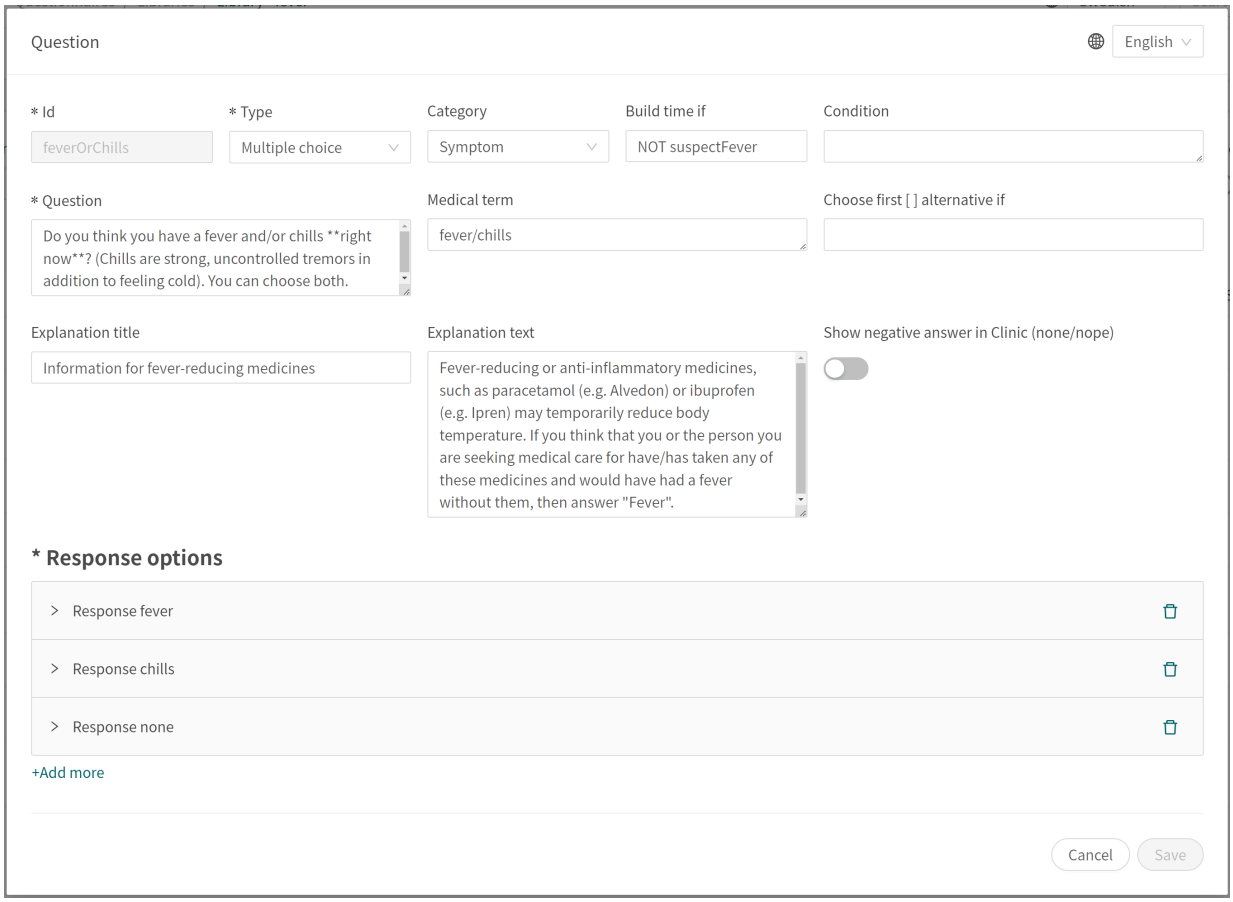
- **Formula**: `suspectFever = true`



This formula is specified before "`libraryFever`" and, also as a result, "`libraryFeverSimple`" are included.

The "`believeFeverOrChills`" question in "`libraryFeverSimple`" has a **Build Time If** condition ensuring it is not asked when "`suspectFever`" is included. Note that it does not matter how the formula is set, only that it exists.

- **Id** field: `believeFeverOrChills AS yesno`
  Category field: `Symptom`
  Build Time If field: `NOT suspectFever`
  Question field (visible for the patient): "Do you think [you have/your child has] at this moment a fever and/or..."
  Medical term field (visible for practitioners in Clinic): "Ongoing fever/chills"

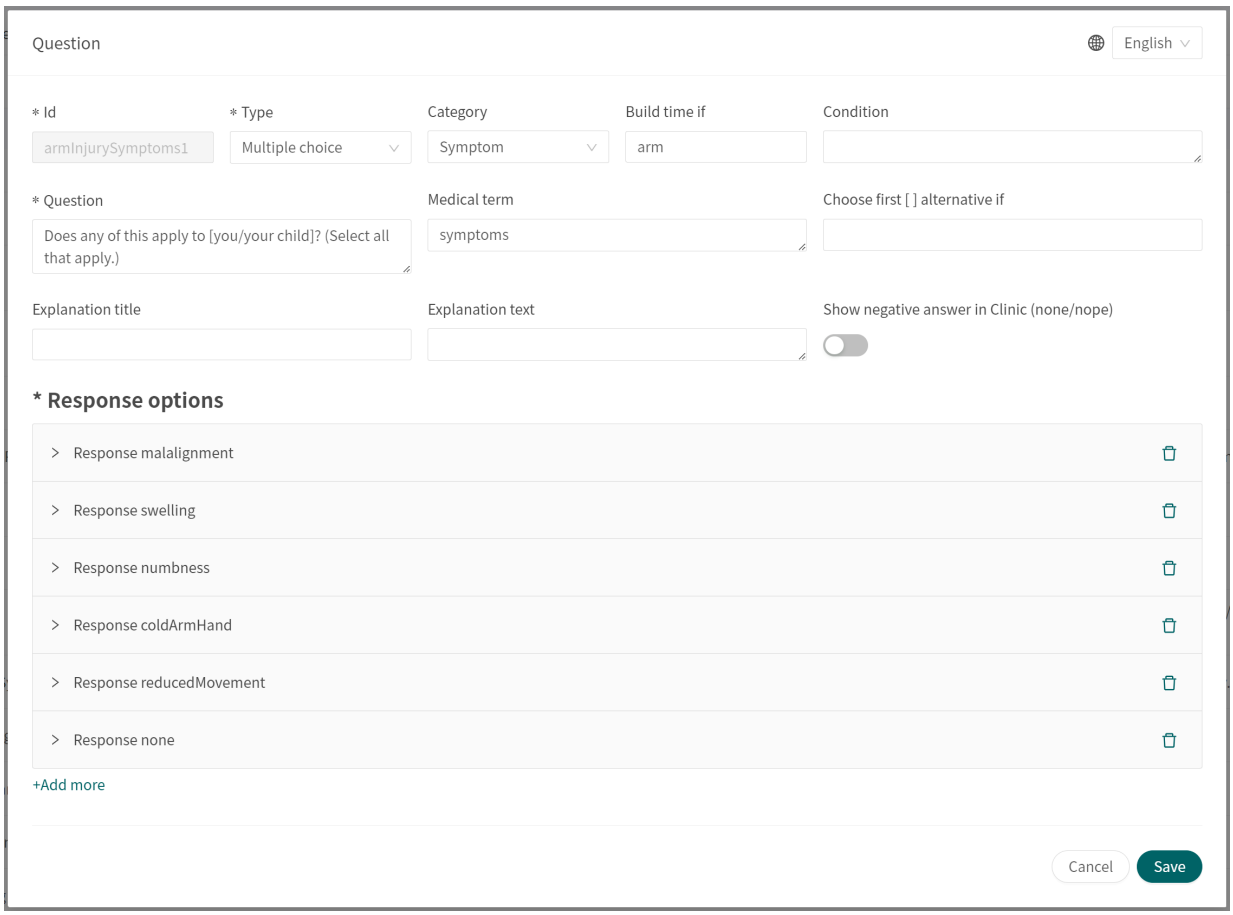


Another way to send values to a Library is to use the `Call` questionnaire component with parameters which are then used in the **Build time if**.

- **Call:** `libraryLateralityInjury (arm)`



`Arm` is then used as a **Build time if** for a response option to the question in the library.



Note that answers from patients in **Build time if** cannot be used because they are evaluated before a patient journey has begun.

There are a number of other conditions that can be used:

Build time if: `xxx [NOT] IN QUESTIONS`	Includes the questionnaire component if a question exists or does not exist in the set of questions.

Build time if: `WORKSHEET IS [NOT] xxx`	Includes the questionnaire component if the medical condition questionnaire is/is not specified.
Build time if: `WORKSHEET IS [NOT] INCLUDED`	Includes the questionnaire component if it is added/not added as a result of the **Include** or **Call up** questionnaire component.

10.4. Condition

Conditions for when a component has to be activated for the patient. For example, if a specific answer to a question is to activate the component.

If the condition is to validate that a patient has answered a certain answer, the following syntax is specified:

```
<questionId>.<responsId>
```

If the condition is to validate that a patient answered **Yes** (yes/no question) the following is used:

```
<questionId>
```

If the condition is to validate that the patient answered **No** (yes/no question) the following is used:

```
NOT <questionId>
```

If the condition is based on **answer points**, the following is used:

```
<questionId>.points
```

If the question has to be answered but the answer to the question does not affect the logic but only THAT the question is answered:

```
vars.<questionId>
```

```
vars.<questionId>.<responsId>
```

Conditions can be based on dates. A date can come from three sources:

- Properties (`properties.creationDate, properties.startedDate, healthDataValue.date`)
- Answers to date questions, using the `questionId` of the date question.
- Static dates (using the syntax `date(YYYY-MM-DD)`.

Dates should have format YYYY-MM-DD.

To get days/months/years:

```
day(someDate)
```

```
month(someDate)
```

```
year(someDate)
```

To get the amount of days/weeks/months/years between to dates:

```
days(someDate, someOtherDate)
```

```
weeks(someDate, someOtherDate)
```

```
months(someDate, someOtherDate)
```

```
years(someDate, someOtherDate)
```

It is also possible to write conditions based on:

`systemBirthDate` (the birth date of the patient)

`systemAge` (the age of the patient)

`systemGender` (the gender of the patient)

Conditions can contain several validations and answers to previous questions or questionnaires where the following can be used to bind the conditions together and check the value:

Binding conditions:

`AND` = and

`OR` = or

What has to be fulfilled:

"`!=`" = not equal to

"==" = equal to

If no value can exist:

`null` = no value

It is important to have spaces between the first value, the minus sign and the next value to write a formula with subtraction (`-`). If this is not done, the formula is interpreted as a name instead of an equation.

- **OK**: `23 - someVariable`
- **Not OK:** `23-someVariable`



NOTE
The `Free Text`, `Medication` and `File` question types cannot be used in conditions.

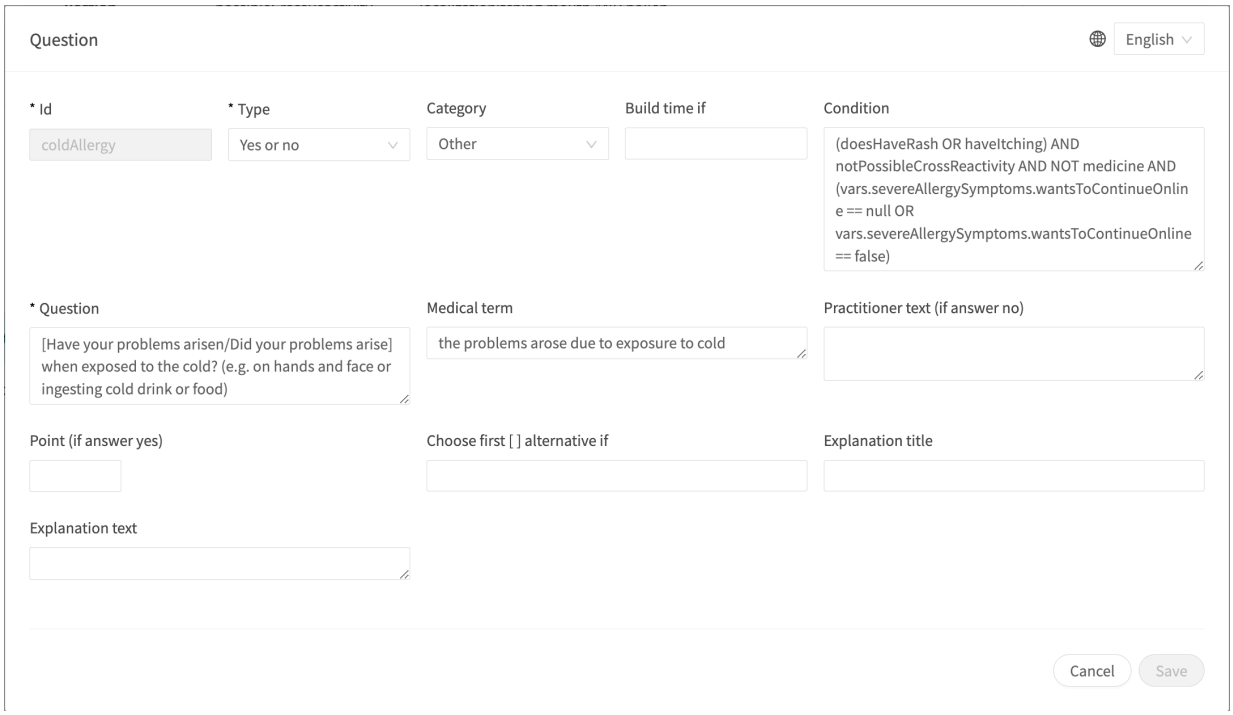
10.5. Choose first [ ] alternative if

If a logic other than default `[You/Your child]` has to be used, other conditions can be used to control whether the first or second option in the syntax should be used.

For example, if the question:

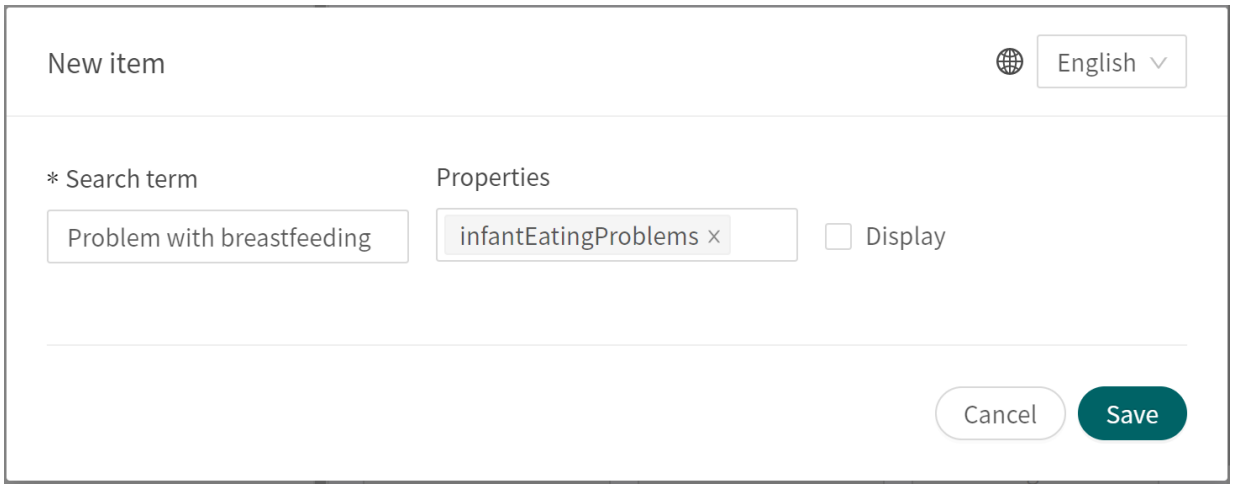
“[Have the problems arisen/Did the problems arise] in connection with exposure to the cold?”

is displayed in the “**Question**” field, the parameter ongoing has to be specified in the **Choose first [ ] alternative if** field, where "`ongoingAllergy`" is a parameter from a search term that accompanies the patient in their patient journey if they sought help e.g. for “Ongoing allergic reaction”. If `ongoingAllergy` exists, the first option in “`[ ]`” will be used, and if `ongoing` is not specified for the patient, the second option will be displayed in the question.



10.6. Properties

Properties are set in the **Search terms** section, for example the search term: “Problem with breastfeeding” has the `infantEatingProblems` property.



This property can then be used as a condition for a question, e.g. **Question**: `eatingProblemDetails` has the conditions: `properties.infantEatingProblems AND infant`

Properties can also be set when you use **Go to another questionnaire** to include the required properties in the next questionnaire.

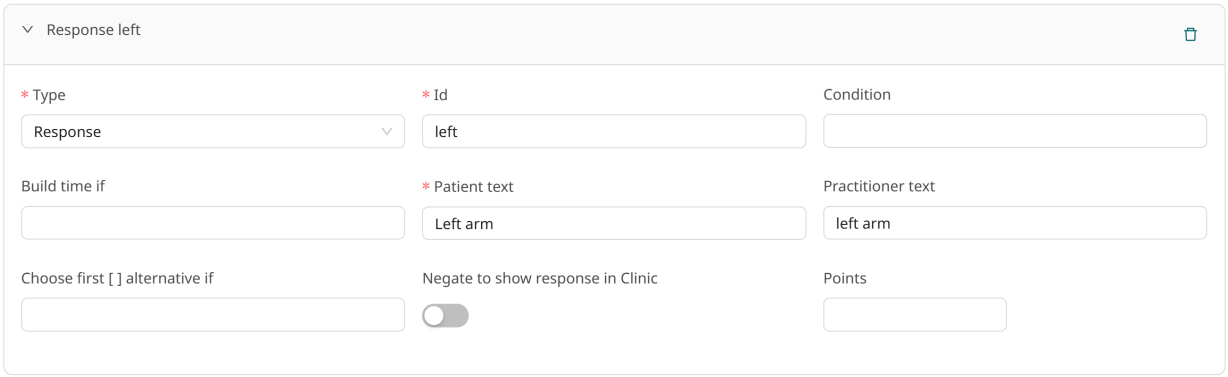


NOTE

Formulas are not included when using **Go to another questionnaire**, while **Properties** are included.

10.7. Response options

- **Type**: **Response**
- **Id**, refer to ID [108] above
- **Condition**: refer to Condition [111] above
- **Choose first [ ] alternative if**: refer to Choose first [ ] alternative if [112] above
- **Patient text**: text displayed for the patient
- **Practitioner text**: how the response option is displayed in the automated summary in Clinic
- **Negate to show response in Clinic**: see Negate Multiple choice questions [121]
- **Points** (only for `multiple choice`, `single choice` and `yesNo` questions)



10.8. Points

Points can be specified per question or response option in the following question types:

- **Multiple choice** questions
- **Single choice** questions
- **Yes or no** questions

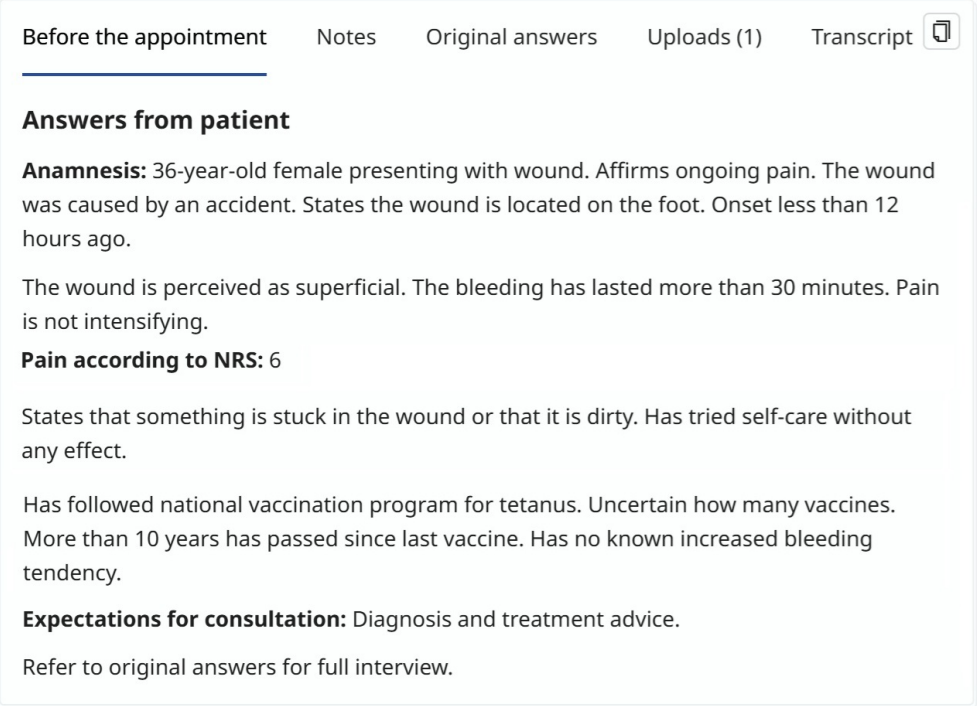
The points can be used to sum up a score from a questionnaire and can be both integers and decimals. Points can also be used to write conditions in the questionnaire statements.

11. Automated summary

11.1. Introduction to automated summary

After a patient interview, an automated summary for healthcare practitioners is generated in Clinic. The text is created based on information about the patient, various variables in the questionnaires used, and from the patient interview.

The automated summary is displayed in Clinic and is intended to structure, categorize, and provide a readable and informative overview of the responses from a completed patient interview.



Example: Automated summary

The text is made up of text components that are defined in the questions and response options in the questionnaire. It is possible to divide the text into up to seven separate paragraphs, and there are three different building blocks to use for each paragraph:

- Own sentence
- Question response
- Question response bold

The paragraph and text components are determined by the category you choose for a question. For example, if a question is given the category "Own sentence 2", the answer is inserted as continuous text in the second paragraph.

The first paragraph begins with information about the patient and the reason for seeking care. If the questionnaire contains a pre-triage section, the introduction will be:

```
##-year-old [girl/female/boy/male] presenting with [reason for seeking
care].
```

If the questionnaire only contains a post-triage section, the introduction will be:

```
##-year-old [girl/female/boy/male] who is booked for [form title].
```

A concluding section may be added automatically with information from the health profile and/or concluding questions. The content of this section depends on whether the patient has completed their health profile and whether the questionnaire is configured with auto-completed questions.

Answers from patient

Anamnesis: 56-year-old female presenting with high blood pressure. — Introduction

Negates chest pain or pressure across the chest. Associated symptoms in the form of headache. — Own sentence 2

Last blood pressure measurement 1-7 days ago. — Own sentence 3
Measured systolic blood pressure value: 150
Measured diastolic blood pressure value: 90 — Question response 3

Has measured elevated blood pressure on at least 2 occasions. Has not measured blood pressure in both arms. — Own sentence 4

Is not a smoker now and has not previously been. Drinks alcohol 2-4 times a month. Drinks 1-2 glasses on a typical day with alcohol. Does not use drugs. Does not exercise regularly. — Own sentence 6

General health: Negates the general health status is affected. — Question response bold 7
Has a previous confirmed diagnosis: No

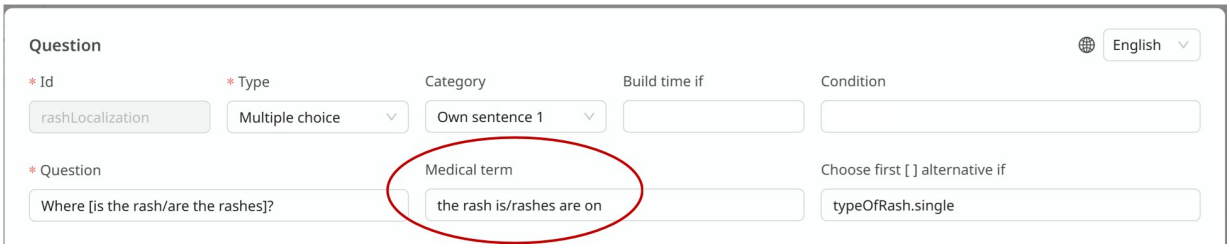
Expectations for consultation: The cause of the symptoms, treatment advice and prescription. — Final part
Allergies: Allergic to pollen submitted in health profile.

Refer to original answers for full interview.

Example: Division into paragraphs

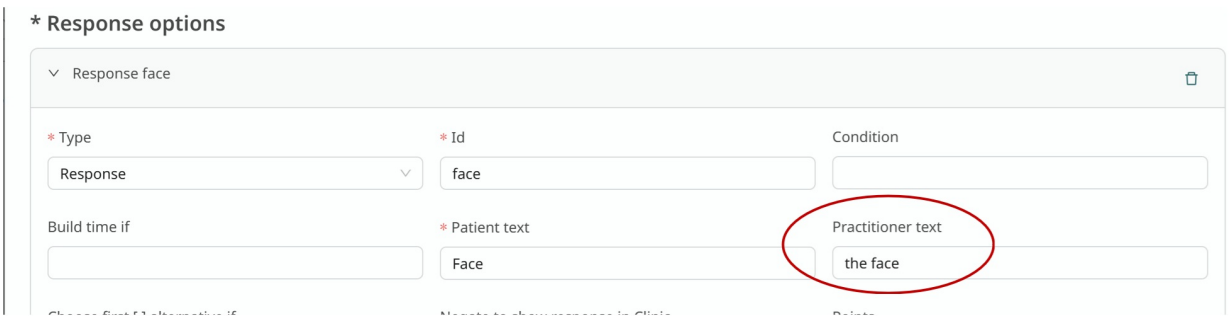
11.2. Text components

The text components used to generate the automated summary are taken from the **Medical term** fields in questions:



*Example: **Medical term** field in a question*

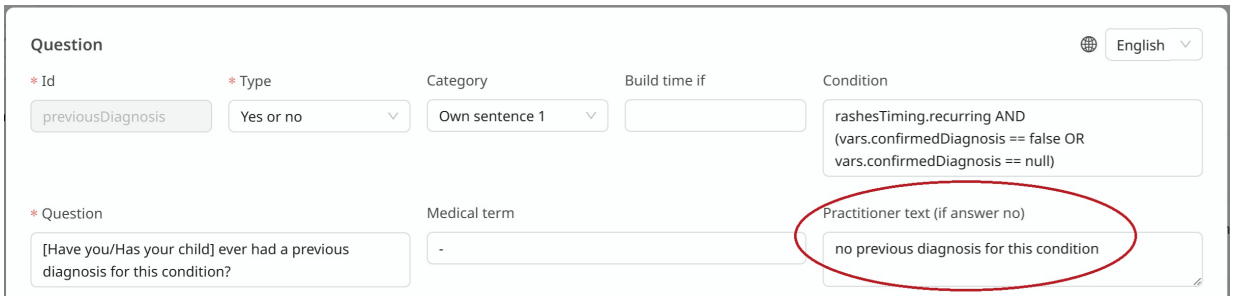
And from the **Practitioner text** fields in response options:



*Example: **Practitioner text** field in response options*

The use of the **Medical term** and **Practitioner text** fields varies based on the type of question asked and the chosen category.

For "yes or no" questions, you can also specify a text in the **Practitioner text (if answer no)** field that is used when the patient answers "no" . If the field is empty and the patient answers "no", the **Medical term** field is used instead with the word "denies" added at the beginning.



*Example: **Practitioner text (if answer no)** field in a question*

Write the text components in lowercase except for proper nouns and abbreviations, such as "ADHD." Capital letters and periods are automatically added.

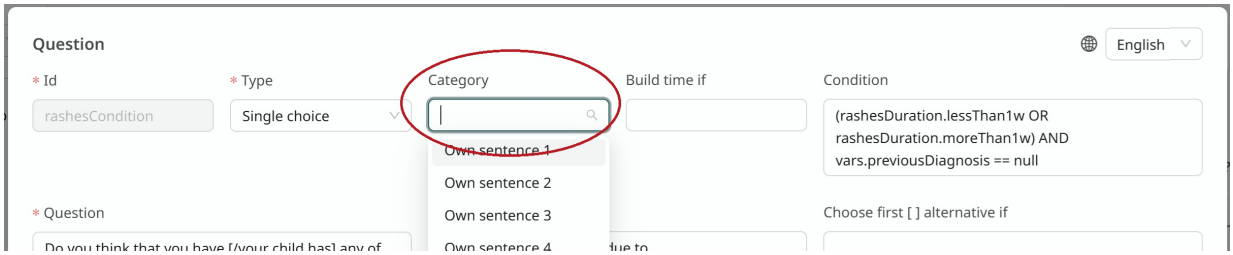
11.3. Categories

Select a category from:

- Own sentence [1–7]
- Question response [1–7]
- Question response bold [1–7]
- Hidden

There are more categories to choose from in the list, but they are there so that previously developed forms will still work.

Several questions can have the same category. They will then together form a paragraph in the automated summary.



Example: Question categories

11.3.1. Question response

The categories "Question response [1-7]" and "Question response bold [1-7]" work the same way for all question types. The **Medical term** field in the question is used as a heading followed by a colon. After the colon comes the **Practitioner text** field from the selected response options in multiple-choice/single-choice questions or the specified answer from other question types.

Systolic blood pressure value: 140

Diastolic blood pressure value: 90

Example: Question response

The category "Question response bold" means that the text up to and including the colon is written in bold.

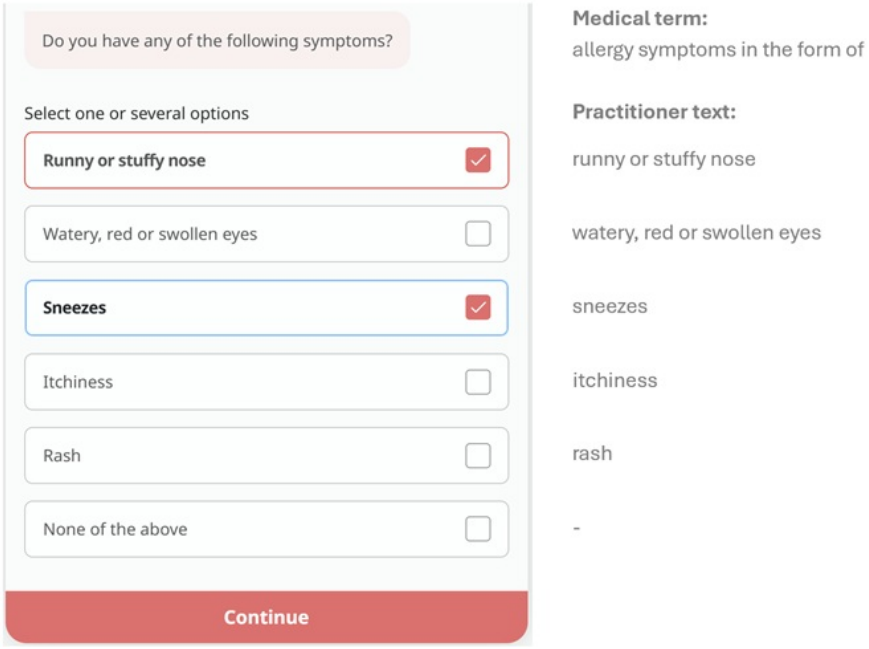
When using "Question response" and "Question response bold," the **Medical term** field for the question must be specified.

11.3.2. Own sentence

Own sentence works differently depending on the question type.

Question type: Multiple choice

The sentence is created from the question's **Medical term** and **Practitioner text** fields for each selected response option.

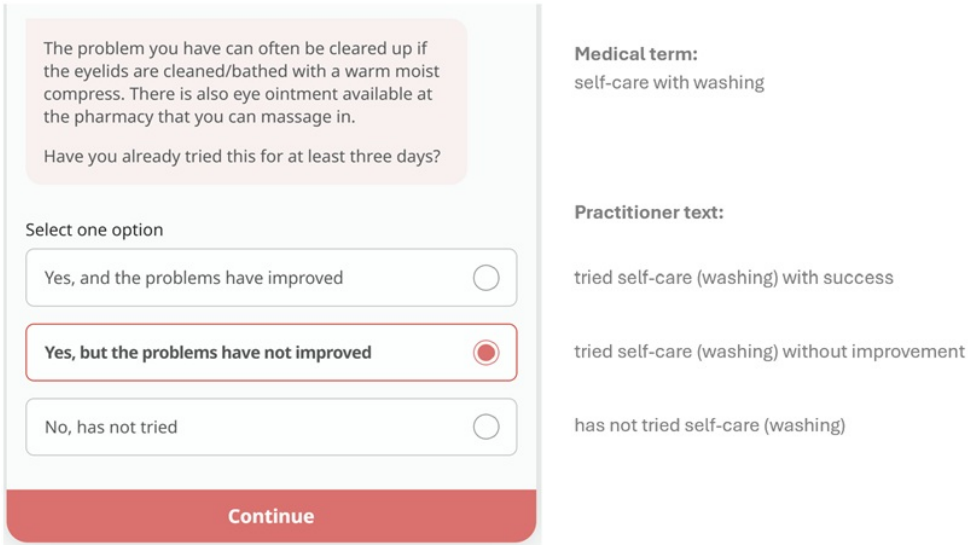


Example: Multiple choice question

Result: Allergy symptoms in the form of runny or stuffy nose and sneezes.

Question type: Single choice

The **Practitioner text** field for the selected response option is used. The **Medical term** field from the question is not used and therefore does not need to be specified.



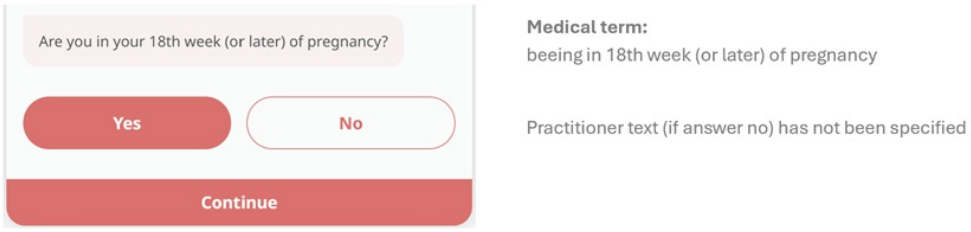
Example: Single choice question

Result: Tried self-care (washing) without improvement.

NOTE
The **Medical term** field is not used even though it is specified.

Question type: Yes or no

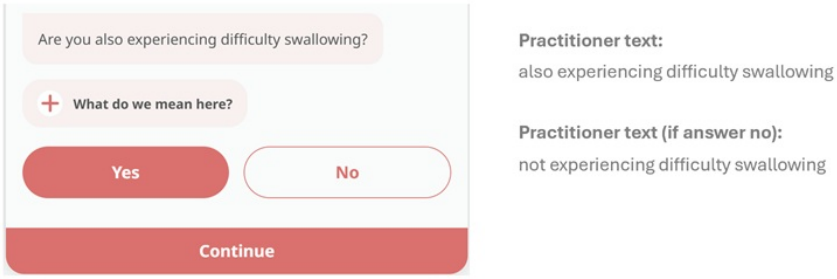
The text differs depending on whether the **Practitioner text (if answer no)** field in the question has been specified or not. If this is not specified, the **Medical term** field is used instead with the word "affirms" or "denies" added at the beginning.



*Example: Yes or no question without specified **Practitioner text (if answer no)***

Result: Affirms being in 18th week (or later) of pregnancy.

If the **Practitioner text (if answer no)** field has been specified in the question, both affirmative and negative answers will be printed as they are without the addition of "affirms/denies".

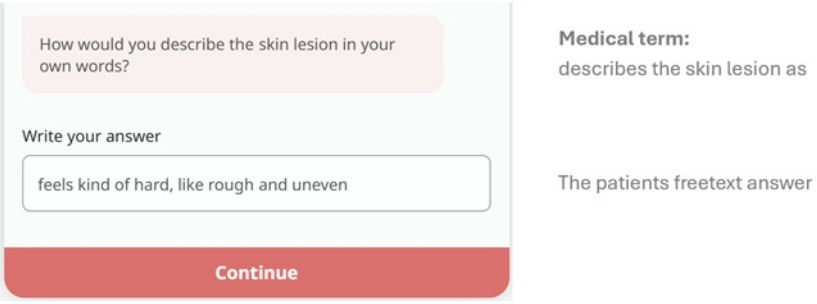


*Example: Yes or no question with specified **Practitioner text (if answer no)***

Result: Also experiencing difficulty swallowing.

Question type: Free text

The sentence is created from the **Medical term** field in the question and from the answer entered by the patient.



Example: Free text question

Result: *Describes the skin lesion as feels kind of hard, like rough and uneven.

The asterisk at the beginning indicates that the answer is free text.

> **NOTE**
> There is always a risk that the patient enters something that does not match the **Medical term** field in the question. Consider using the "Question response" category for free text questions.

Question types: Date, Number, and Scale

The sentence is created from the **Medical term** field in the question and from the answer selected by the patient.



Example: Date question

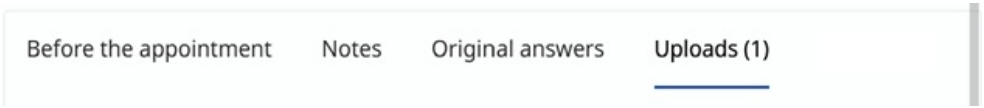
Result: Fell on 2025-05-13.

11.3.3. Hidden

Used when the question should not be included in the summary.

11.4. Other question types

The "File" question type is not used in the summary. Uploaded files, such as photos, are displayed in the **Uploads** tab.



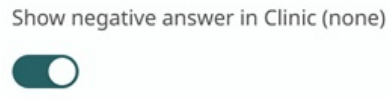
"Medication" is only used in the prescription renewal form. Prescription renewal has its own template for the automated summary, which is not covered here.

The question type "Yes, no or maybe" is not handled in the automated summary. Use a single-choice question with these options if necessary.

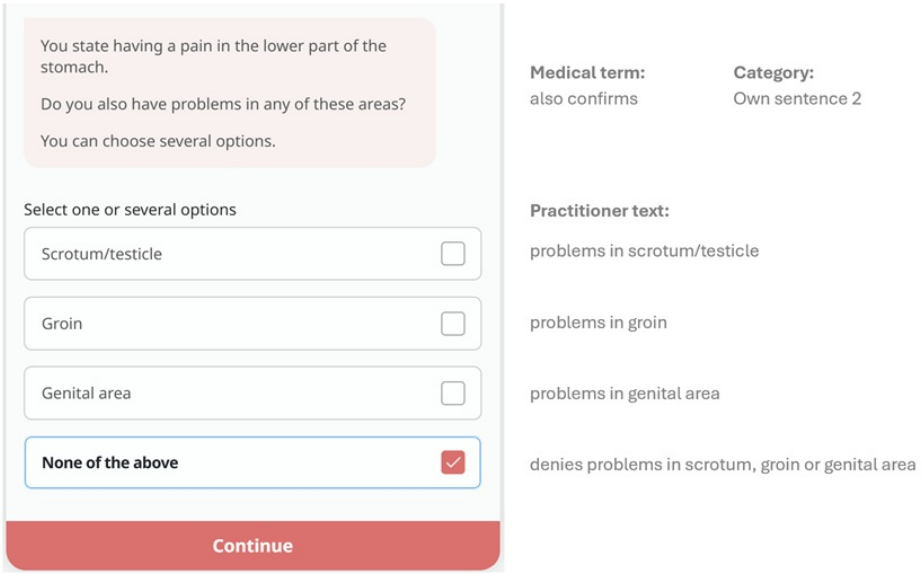
11.5. Negate Multiple choice questions

"Multiple choice" questions can have one response option that automatically deselects other options when selected, which is achieved by giving the response option the ID "none." Normally, the question is not included in the summary if that answer is selected.

Sometimes it is worth noting that none of the suggested response options have been selected. In these cases, you can enable the display of negation in the question.



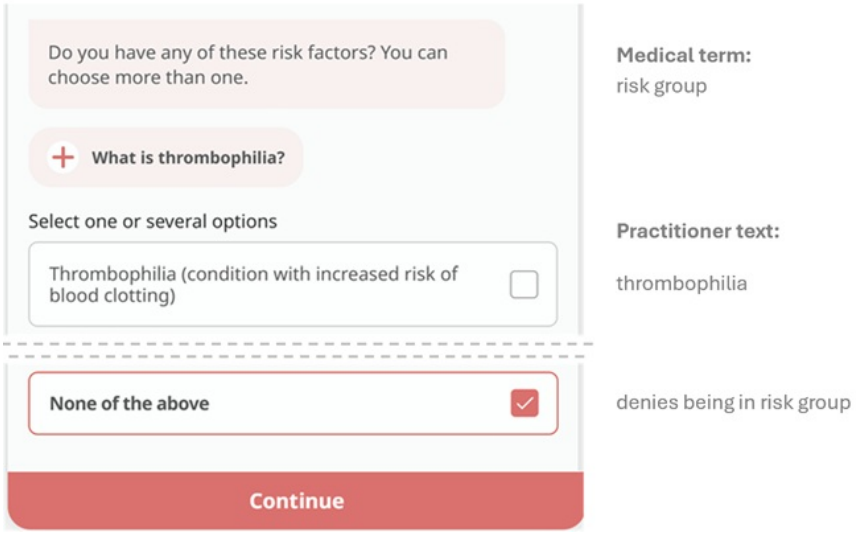
Turn on display of negation



Example: Negated "Multiple choice" question with the category "Own sentence"

Result: Denies problems in scrotum, groin or genital area.

NOTE
The **Medical term** field is not used in negation when the question category is "Own sentence." If the question has the category "Question response", the **Medical term** field is used.



Example: Negated "Multiple choice" question with the category "Question response"

Result: Risk group: Denies being in risk group.

12. Terms and definitions

B1-B2	B1-B2 in the Common European Framework of Reference (CEFR) self-assessment scale. e.g. Independent user of the language.
C1-C2	C1-C2 in the Common European Framework of Reference (CEFR) self-assessment scale. e.g. Proficient user of the language.
Customer Success Manager (CSM)	A CSM (Customer Success Manager) is the customer's main strategic advisor. The CSM is also the customer's main contact person for any contractual, commercial questions/issues. The CSM is the first point of escalation for any unsolved questions/requests/issues
intended use	The intended use (medical devices) means the use for which the device is intended according to the data supplied by the manufacturer on the labelling, in the instructions and/or promotional materials
MADRS-S (MADRS)	The Montgomery–Åsberg Depression Rating Scale (MADRS) is a ten-item diagnostic questionnaire which psychiatrists use to measure the severity of depressive episodes in patients with mood disorders. MADRS-S is a nine question self-rating version of the MADRS scale, often used in clinical practice.
medical content	Medical content is the configurable logic based content used in the medical device Triage24. The purpose of the medical content is to provide a set of rules to be used in Triage24 to determine the urgency when providing a triage recommendation based on the answers of the patient.
Natural language processing (NLP)	Natural language processing (NLP) is a subfield of linguistics, computer science, and artificial intelligence concerned with the interactions between computers and human language, in particular how to program computers to process and analyze large amounts of natural language data.
user interface (UI)	The user interface (UI) is the point at which human users interact with a computer, website or application.

13. Manual versions

#	Date	Description
0.1	2020-11-02	First draft
0.2	2020-11-27	Updated after assessment
0.3	2021-02-16	Updating and addition of function descriptions
1.0	2021-02-16	1st version of Content24 User guide
2.0	2021-03-29	2nd version of Content24 User guide including updating of function descriptions.
3.0	2021-09-06	Format updates. Cover, color-scheme, format of warnings.
4.0	2021-10-04	Addition of descriptions on how to edit search terms.
5.0	2021-11-02	Update based on release-notes.
5.1	2022-03-02	Transfer of the content from the Word file version to Paligo. No content updates apart from minor spelling and grammatical fixes and to fix some re-use issues.
8.0	Not released to end users. Transitionary version.	Transition to version 8 for synchronisation with the SE-sv manual. Updates made in the SE-sv in v6, v7 and v8 are included. from v6 SE-sv - Update of contact information, unit tests and exit care advice. from v7 SE-sv - Links in exit care advice. from v8 SE-sv - added IF THEN ELSE explanation for formulas added, Scale removed from note on usage in conditions, Metadata "hide health profile" is now deactivated
9.0	2022-03-17	Rewrite and update of Unit tests
9.1	2022-03-29	Structural updates with no effect on content
9.2	2022-05-25	Correction of texts for Unit tests. Not officially published. Added clarification to Free text question types.
10.0	2022-10-31	Updated publication after Triage24 MDR certification. Changed manual name from User Guide to User Manual. Changed name from decision support to flags. Updated sections regarding exit care advice, conditions and flags.

#	Date	Description
11.0	2023-04-17	Main updates are: • Changed Content24 to Content Studio, Manage24 to Manage and Clinic24 to Clinic • Almost all images replaced (due to new logotype and UI changes) • *Section 5.1.3 Intended users* updated for medical content developers: medical developers changed to medical content developers and business rules added to their role. • *Section 5.2.3. Intended operational environment for Content Studio* updated. Clarified that the application is Manage and the interface is Content Studio. • Self-care information updates (UI changes, and information on MediBas removed) • Question type • Questionnaire description • Metadata (new and changed fields) • Export data in Local name component • More supported file formats for questions • "Replace staff response on question" field deleted as it is no longer in use • Name/Title/Description/Questionnaire aligned to title • Date questions possible to add as as skippable • Information about automatic added none responses removed • Text from Abstract moved into an Introduction chapter. Clarifying note added to the Introduction chapter regarding updates in the manuals.
12.0	2023-09-22	Main updates are: • Product name changed to Content Studio+. • Information about point of contact in case of serious incidents moved from Intended use chapter to page 2. • Updated intended use according to document *Triage24 - Definitions of intended use, user profiles and use environments SE-en D490*. • Technical support section updated. • Symbols Chapter updated with admonitions description. • "Modified" status removed from questionnaires. • Maximum limit for changes to questionnaires removed as only local copy or unchanged questionnaires from Platform24 now exist. • Format for dates clarified in conditions.

#	Date	Description
13.0	2024-01-11	Main updates are: • Section 8.4.2 updated with the possibility to include images in self-care information. • Section 9.3.2 restructured and clarified. • New section *9.3.3 Unique search terms and the Display option* added. • Section 10.8 updated and information added that points can be both integers and decimals. • Intended use for Triage24 updated to include business rules, a clarifying note and some other minor clarifications. • Support email for user manuals updated.
14.0	2024-05-20	• Manage version added on the first page. • Date of manufacture symbol has been added on page 2 and in *Section 3.1 Symbols definition*. • Information added in *Section 2.3.1* about that a paper version of the user manual will be provided at the latest within 7 calendar days of receiving a request from the user. • In *Section 3.1. Symbols definition*, the previous warning symbol has been replaced with a caution symbol indicating to the users to consult the instructions for use for relevant warnings and cautions. • Sentence removed from *Section 5.1 Triage24* about that the triage algoritm is based on the Swedish standard of Telephone triage protocol RGS (Rådgivningsstödet). This only applies for customers that have purchased the medical content from Platform24, and not for customers that creates their own medical content.
15.0	2024-06-17	Added clarification in section *9.5.1. Attributes and values in Exits* about the need to perform thorough testing and have a good understanding of the effect when adding, editing or deleting exit attributes.
16.0	2024-12-05	Main updates are: • Section *5.1.2. Intended use for Triage24* updated, due to changes in the Technical File. Chapter *5. Triage24 - Intended Use* updated to be aligned with wordings and clarifications in the Technical File. • Redundant note regarding the Triage24 device removed from Chapter 4 and 5. The information in the note is already defined in Chapter *5. Triage24 - Intended Use*. • Hardware and software requirements moved from Chapter 5 to a separate sub-section in Chapter *1. Introduction*. • Wording in the manual changed to be applicable for all markets. Hence, section *6.2. Log in to Manage* has been updated to be more generic. • Section *7.2. Access to Content Studio+* updated and the sub-menu option "Information articles" as been added. • Section *9.12.1. Attributes and values in flags* updated. "Symptom" field changed name to "More information". Updated and added description on how to add text and a link to this field.
16.1	2024-12-20	Three images replaced in sections 8.1.1 and 8.2.2. Only applicable for the English version.

#	Date	Description
17.0	2025-02-03	• Updates on regulatory information on page 2. MD icon added. • Address to manufacturer updated on page 2 and in section *2.1. Manufacturer*. • "Should" changed to "shall" in section *5.5.1. Patients*.
18.0	2026-02-13	Main updates are: • Name of the manual and references to other manuals changed from User Manual to Instructions for Use. • General: Images updated to reflect changes in the user interface. • General: "Medical history summary" changed to "automated summary". • General: References to smartText User Manual removed. • The note has been updated in section *1.1. About this manual*. • Updated sections: *1.2. Hardware and software specifications Clinic/Manage*, *3.1. Symbols definition*, *6. What is Manage and Content Studio+?*, *6.1. Platform24 environments*, *6.2. Log in to Manage*, *7.1. Working with Content Studio+*, *9.10. Export data* and *10.7. Response options*. • 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. • The first two warnings in chapter *4. Warnings* updated. • Heading *5.1.3. Intended user profile for Triage24* added in Chapter 5. *Target client* removed from chapter 5. • Education and training bullet point updated in section *5.2.2. Intended users for Content Studio+*. • Section *5.6. Residual risks* removed. • Previous section *5.7. Terms and definitions* moved to a separate chapter (12). • Previous section *7.5. History, latest changes and testing* replaced by the new section *7.5. Change management and tracking*. • New chapter: *11. Automated summary*. • Chapter *12. References* removed.
19.0	2026-10-07	Main updates are: • Updated note in section *5.1. Triage24*. • Level of instructions updated in section *5.2.2. Intended users for Content Studio+* and *5.4.2. Intended users for Assisted triage*.