platform 24

USER MANUAL – CLINIC

CLINIC V 4.135

Abstract

This is the full User Manual for Clinic.

Platform24 Healthcare AB

Västra Järnvägsgatan 7, SE-111 64 Stockholm, Sweden

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

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1. Contact details

1.1. Manufacturer

Address	**Platform24 Healthcare AB**
	Västra Järnvägsgatan 7
	SE-111 64 Stockholm
	Sweden
Website	https://platform24.com

1.2. Technical Support

1.2.1. End user support

Platform24 does not offer direct access to *end user* support. For questions, the first line of support is your on site *superusers* and trainers.

For information about the superusers in your organization, refer to your internal routines and procedures.

1.2.2. Superuser support

A *superuser* is an end user with increased knowledge and responsibility about the platform on each unit.

The superuser acts as the first-line support for the end users on the device and is the one who turns to Platform24 for further support, if necessary.

For information about the superusers in your organization, refer to your internal routines and procedures.

Urgent cases

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

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

Non urgent cases

For all non urgent support cases superusers should email the support email below.

E-mail: `<support@platform24.com>`

For questions regarding additional services or modules your organization may want to buy or activate, superusers should contact their *Customer Success Manager*, (*CSM*) at Platform24.

1.3. Feedback and questions regarding the user manual

For feedback and questions regarding the user manual, email the user documentation support email below.

E-mail: `<ud.feedback@platform24.com>`

1.3.1. Request printed version of the instructions for use

Platform24 provides the instructions for use for its products in electronic form.

If you require a paper version of the user manual, contact Platform24 via:

E-mail: `<ud.feedback@platform24.com>`

2. Symbols and admonitions

2.1. Symbols

▰	Manufacturer
📖	Consult instructions for use
⚠	Warning

2.2. Admonitions

This section describes admonitions that are used in the user manuals.

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

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

IMPORTANT
An important admonition 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.

3. Warnings

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

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

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

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

4. Summary

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

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

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

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

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

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

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

5. Working Methodology

5.1. Overview

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

5.2. Read up prior to a consultation

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

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

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

5.3. At the end of each session

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

5.4. Child patients

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

6. Log in and log out

6.1. Log in to Clinic

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

    > **NOTE**
    > Some customers might have a unique environment link. Talk to your superuser
    > at Platform24 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 superus-
    > er if you are unsure about the login process at your clinic.

6.2. Log out of Clinic

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

7. Data security

7.1. Overview

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

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

Never leave your computer unattended with your login activated.

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

7.2. Recommendations

Our recommendations to further ensure data security:

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

8. Shift type

8.1. Overview

There are different shift types to customize the user experience. The shift type is preselected, but it can be changed by clicking on your name on the left when you're signed in to Clinic. Also refer to Your profile [37]

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

8.2. Different shift types

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

9. Main menu

9.1. Overview

The main menu can be viewed on the left-hand side of the display when you are logged in to Clinic.
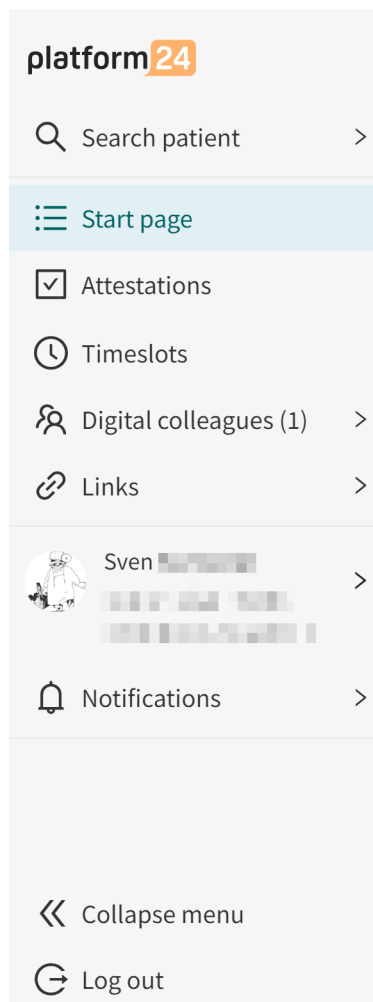
The number of items in the main menu vary depending on your care unit's configuration and your own access rights.

9.2. Start page

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

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

The ledger has different columns which are described in Columns in the ledger [19].

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

- **My current**: Shows patients in drop-in queue for your role (doctor/nurse, etc.) at your care unit, your ongoing appointments, your unanswered asynchronous messages, *asynchronous messages* belonging to a colleague who has answered them within 2 hours, and scheduled appointments for the next 30 minutes, appointments handed over to you or your role and consultation appointments for you or your role.

- **Unsigned**: Here you can view your completed appointments for which you have not signed the entries.

- **All current**: Shows patients in queues and ongoing appointments with your role (doctor/nurse, etc.) at your care unit, scheduled appointments for the next 30 minutes and unanswered asynchronous messages.

- **My latest**: Displays your last 50 appointments

- **Select date**: Here you can filter appointments based on date, care unit, role and healthcare practitioner.

9.2.2. Filters displayed for the Scheduled shift type

- **Today**: Displays today's scheduled patients for your role, for you and for your care unit where the recipient has not been specified, as well as *asynchronous messages*. You can click **Today** and actively select a different time interval from the list you want to view for scheduled patients.

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

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

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

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

9.2.3. Asynchronous cases

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

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

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

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

  JT >

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

  JT >

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

  JT >

	My current	Unsigned	All current	My previous	Third party	▭ Choose date				Hide done ◯

Prio	Status	Name	Condition	Arrived	Practitioner	Ended	Scheduled	Done
3	Async	Viktor ▭ ↗ 19 91	Administrative	Last Thursday at 2:40 PM	SS >	DTA	-	☐
3	Async	Andreas ▭ ↗ 19 91	Sick note	05/19/2023 8:13 AM	AD >	05/19/2023 8:15 AM	-	☐

Last updated few seconds ago   2 items ‹ 1 ›   25 / page ⌄

9.2.4. Filter appointments as a guest (third party)

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

My current	Unsigned	All current	My previous	**Third party**	▭ Choose date

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

My current	Unsigned	All current	**My previous**	📅 Choose date

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

Third party 🟢

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

My current	Unsigned	All current	My previous	Choose date		Hide done ⚪	Third party 🟢

Prio	Status	Name	Condition	Arrived	Practitioner	Ended	Scheduled	Done
3	Closed	Albert ▨ 19 91 ▨	Certificate	04/20/2023 12:56 PM	SS	05/08/2023 1:34 PM	-	☐
3	Closed	Marcus ▨ 19 92 ▨	Acne problems	04/28/2023 10:03 AM	SS	04/28/2023 11:59 AM	05/02/2023 10:00 AM (SS)	☐

9.2.5. Columns in the ledger

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

Prio
Specifies appointment priority defined by the customer. 1 is highest, 5 is lowest. Priority 1 appointments must be received before second priority ones, and so on. Those with the highest priority end up at the top of the ledger. A notification (message) appears in the bottom right-hand corner of the browser window when a priority 1 patient joins the queue. This is described in New prio 1 appointments [20]

Priority can for example be defined as follows:

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

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

Name
The patient's name and unique personal identifier.

Condition
Contact reason for the current appointment.

Arrived
When the patient joined the queue.

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

9.2.6. New prio 1 appointments

When a priority 1 patient queues, a message will appear in the lower right of the web window, regardless of where you are in Clinic. This pop-up window looks like the image here.
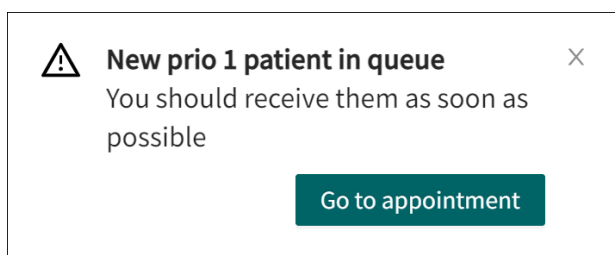
You will see this pop-up window even if you are in a patient appointment and it will also be displayed under the **Notifications** heading in the main menu.

9.3. Attestations

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

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

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

9.3.1. Incoming attestations

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

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

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

9.3.2. Attestations created by me

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

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

9.3.3. Attestations attested by me

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

Attestations   ⊕ Create new attestation

	Incoming	Created by me	**Attested by me**

Patient	Prio	Content	Created at	Attested at	
Lars ▓▓▓▓ 19▓▓▓▓▓ ⧉	3	**Activity missed** (312)	Dec 13, 2021 - Jun 12, 2023	Jun 12, 2023	▾
	3	**Blood pressure and pulse** (1)	Feb 9, 2022	Jun 12, 2023	▾
	3	**Questionnaire finished** (15)	Nov 18, 2021 - Aug 9, 2022	Jun 1, 2023	▾
Mikaela▓▓▓ 19▓▓▓▓▓ ⧉	3	**Activity missed** (173)	Jan 6, 2022 - Apr 25, 2023	Jun 12, 2023	▾

9.3.4. Creating attestations

To create a new attestation outside of a patient appointment:

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

    Attestations   ⊕ Create new attestation

	Incoming	Created by me

    Whose attestations do you want to see?   Filter by type   Show attested ⬤

    | ▓▓▓▓▓▓▓▓▓▓ × ▾ | | Select one or more types ▾ | | |

Patient	Prio	Content	Assignees	Role	Created at	
David ▓▓▓▓ 20▓▓▓▓ ⧉	1	**Blood pressure and pulse** (47)	TS SE	Nurse	Oct 10, 2022 - Nov 9, 2022	▾
	3	**Activity missed** (510)	TS ST SE	Nurse	Oct 12, 2022 - May 17, 2023	▾

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

    ⊕ Create new attestation

3. Enter the fields in the the **Create new attestation** dialog:
    - **Care provider**
    - **Resource** - Expand the tree structure to select the desired role or practitioner.
    - **Priority** - Sets the attestation priority on a scale of 1 to 5, where 1 is most urgent.
    - **Patient** - Add a patient if the attestation regards a specific patient. It is possible to search and add the patient via name or unique personal identifier.

- **Notes** - Add a note about what the attestation is about according to the procedure at your clinic.

Create new attestation

Care provider

| Test care provider Current |

Resource

| ⌄ |

Priority

| 3 | ⌄ |

Patient

| ⌄ |

Notes

| |

Cancel   Submit

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

9.3.5. Assign an attestation

To assign an attestation:

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

Attestations   ⊕ Create new attestation

Incoming   Created by me

Whose attestations do you want to see?   Filter by type
| ▓▓▓▓▓▓▓▓▓▓▓▓ × | ⌄ | | Select one or more types | ⌄ | Show attested ⬤

Patient	Prio	Content	Assignees	Role	Created at	
David ▓▓▓ 20▓▓▓ ⧉	1	**Blood pressure and pulse** (47)	TS SE	Nurse	Oct 10, 2022 - Nov 9, 2022	▾
	3	**Activity missed** (510)	TS ST SE	Nurse	Oct 12, 2022 - May 17, 2023	▾

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

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

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

9.4. Time slots

The **Time slots** heading is not available to everyone. This may be because your care unit doesn't have a digital flow to schedule time slots, or it might be because that only those in your care unit who schedule time slots have access to this feature.
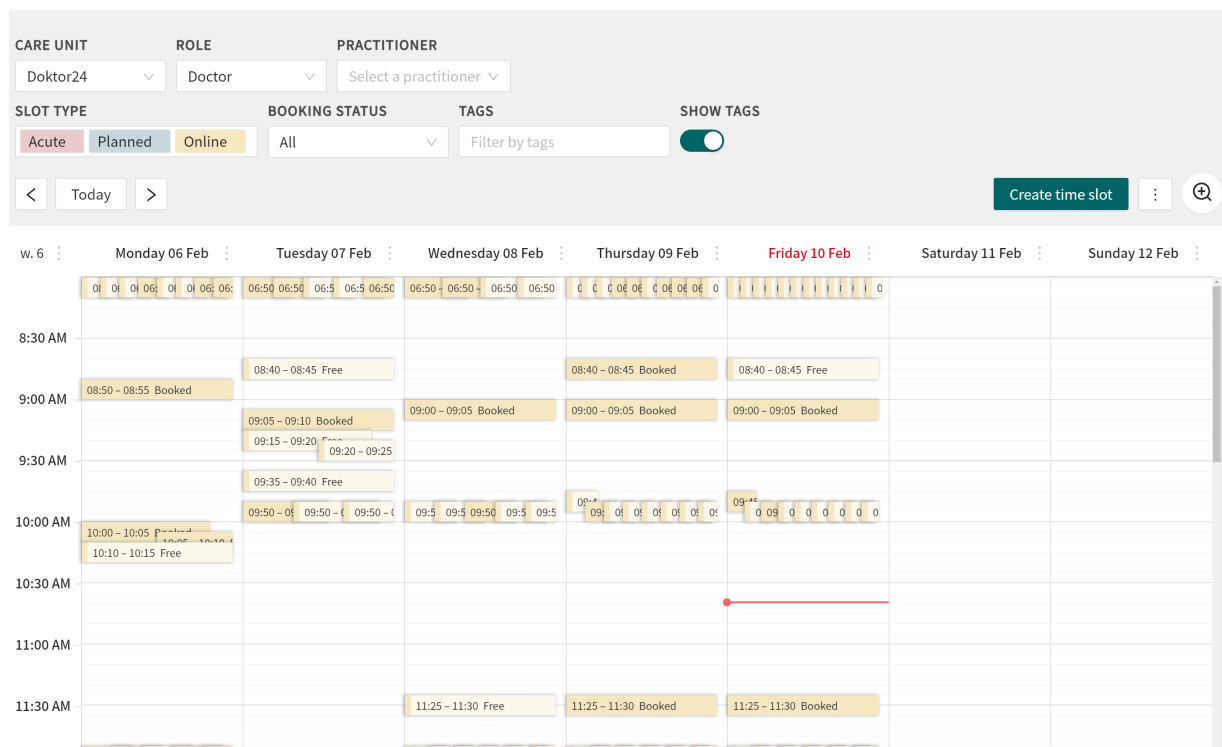
When scheduling time slots, it is important that you enter the correct details in each box in the upper part of the window to ensure the correct time slot type is added to the correct care unit and for the correct role. Start by looking in the top section where you see the headings: *Care unit, Role, Practitioners, Slot type, Booking status, Tags.*

- **Care unit:** Make sure that you have selected the care unit in question. Some organizations have only one clinic and thus only one selection, while other care units may have different clinics, and it is therefore very important not to confuse them.

- **Role:** Here you can select the Role (profession) for which to schedule time slots.

- **Healthcare practitioners** Here you should select All. Currently it is not possible to schedule a time slot for a specific person with whom the patient can choose to make an appointment.

- **Slot type:** There are three different time slot types: *Acute, Planned, Online.* You can select the time slot type you want to see here.

  - *Acute* refers to physical time slots that patients can book when they have been triaged to requiring an urgent physical consultation.

  - *Planned* also refers to physical time slots that patients can book when they have been triaged to requiring a booked consultation.

  - *Online* refers to time slots that patients can book when they have been triaged to requiring an online consultation. Health professionals can also book a time slot for patients using online appointments posted in **Time slots**.

- **Booking status**: Here you can filter to see *All, Booked,* or *Free* time slots. The selection in the time slot type box controls whether you see *All, Booked* or *Only Free Time slots* for *Acute, Planned* or *Online.*

- **Tags**

9.4.1. Setting up an appointment in Time slots

Once you have selected your settings and are setting up an appointment, hover the mouse over the start time in the schedule you want to book. You can release the mouse pointer directly or scroll down to the end time. You can then check if the time was correct after you release the mouse pointer or adjust the time slot/time slot type if necessary.

If you want to repeat the time slot, select the repeat frequency you need in the **Repeat** list.

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

9.4.2. Adding several identical time slots in a row

1. Go to **Timeslots**.
2. Create the first time in your round with consecutive time slots.
   a. Set the time range (**Start** and **End**).
   b. Select **Slot type**, **Role**, and **Healthcare practitioners**.
3. Select **In a row** in the **Repeat** field.
4. Fill in the end time for the round in the **Repeat until** field.

New time slot   ✕

Date   Start   End

2023-04-15 🗓   09:30   🕐   09:35   5 minutes 🕐

Repeat   Repeat until

In a row   ∨   10:35   🕐

Tags

Add tag +

Slot type

Online   ∨

Role   Practitioner

Doctor   ∨   All   ∨

                                   Cancel   Create

9.4.3. Deleting a time in Timeslots

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

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

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

All timeslots added to **Timeslots** must be mirrored/booked in your regular medical records system. Thus, the timeslots added to **Timeslots** must also be added at the corresponding timeslot and for the correct professional in your regular appointments book.

If you are going to delete a timeslot in **Timeslots** that has not been booked, you will hence have to delete the corresponding timeslot in your regular appointments book. This will also have to be done when an unbooked timeslot disappears automatically as described above.

9.4.4. Copying appointments to your regular appointment book

When a patient has a booked appointment in **Time slots**, the appointment could also, if desired, be transferred to your regular appointments book.

This is done as follows:

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

Monday, January 30, 2023 10:40 AM (Online)   ×

Patient: Lovisa ▓▓▓ ▓▓▓
Personal ID:

19 9▓▓▓▓▓▓ ▯

Phone number:

+▓▓▓▓▓▓

Medical history: Copy medical history

Anamnesis: 31-year-old female presenting with coronavirus. no affirmed symptoms.

General health: Not asked about general health.
Specific case regarding COVID-19: Questions about COVID-19 or vaccination

Negated symptoms: No negated symptoms.

Allergies: Ds submitted in health profile.
Previous/current diagnoses: Ds submitted in health profile.
Current medication: T submitted in health profile.
Previous operations: Tes submitted in health profile.

Meeting created:

01/30/2023 by Patient

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

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

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

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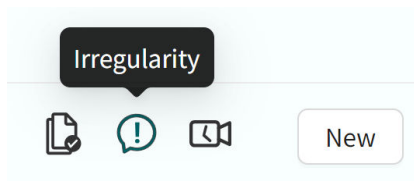
9.5. Irregularities

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

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

9.5.1. To report irregularities

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

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

3. Fill in the relevant information.

Irregularity

Date of irregularity

2022-03-21 11:00

Category

Type

Positive

Description

Actions taken by reporter

Cancel   Submit

4. Click **Submit**.

9.5.2. To read and manage irregularities

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

Irregularities

| Select date 📅 | Select assessor ⌄ | Select category ⌄ | Select type ⌄ | Select status ⌄ | Search for a label |

Date of irregularity	Assessor	Category	Labels	Type	Status
2023-02-09 13:01	Natalie			Negative	Closed
2023-02-09 12:59				Negative	Open
2023-02-09 12:27				Positive	Ongoing
2023-02-09 12:26				Negative	Closed
2023-02-08 13:58				Negative	Closed
2023-02-08 13:56				Negative	Closed
2023-02-06 12:15				Negative	Ongoing

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

ID b9f2b87f-f0c9-409e-ad82-ae1225b4de56 Open

Reported by: Educational Nurse
Link to the case ⟶

Date of irregularity
2022-03-21 11:13

Assessor
Educational Nurse ⌄

Category
Test-kategori

Category
Test-kategori ⌄

Type
Negative

Level of Harm (1 - 5)
1: Potential risk that did not reach patient. ⌄

Description
Test

Comments from involved parties

Assessment

Actions taken by reporter
Test

Actions

Labels

Submit   Close report

3. Fill in the relevant information and click **Submit**.

4. Click **Close report** to prevent further editing.

9.6. Search patient

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

9.6.1. Search for a patient

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

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

9.6.2. Register a new patient

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

For more information, refer to Registering new patients [92].

9.7. Digital colleagues

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

× **Digital colleagues**

Care Unit

▓▓▓▓▓▓▓▓▓▓ ▓▓▓▓▓▓ ▓▓▓   ⌄

Role

Doctor   ⌄

Sven ▓▓▓▓▓▓▓**, Doktor**

Drop in, primary line

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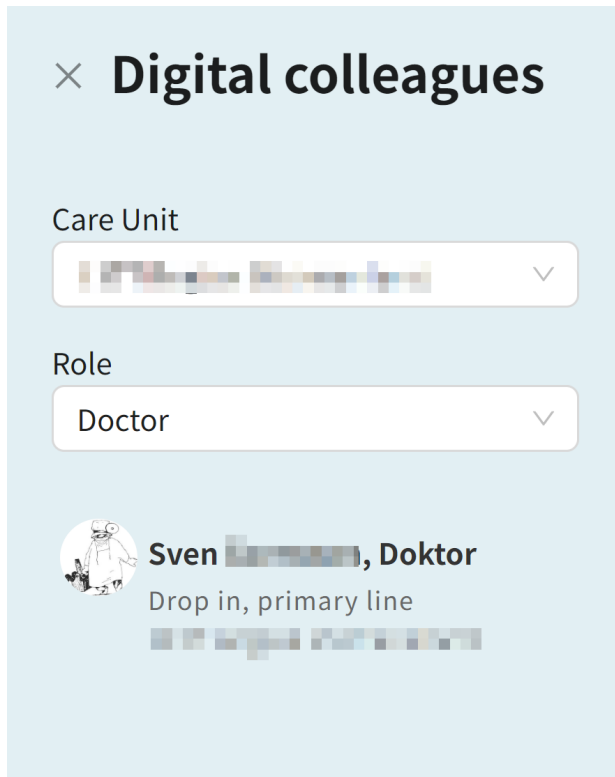
Care unit: You can select which care unit to display if your organization has more than one care unit.

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

9.8. Links

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

× **Links**

Support

Contact Details

My daily systems

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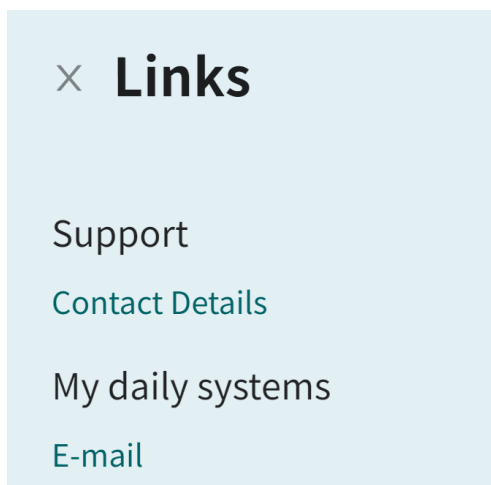
> **NOTE**
> This heading is only visible if your care unit has chosen to activate it.

9.9. Notifications

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

Notifications are created for:

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

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

9.10. Your profile

Click on your name to open your personal settings.
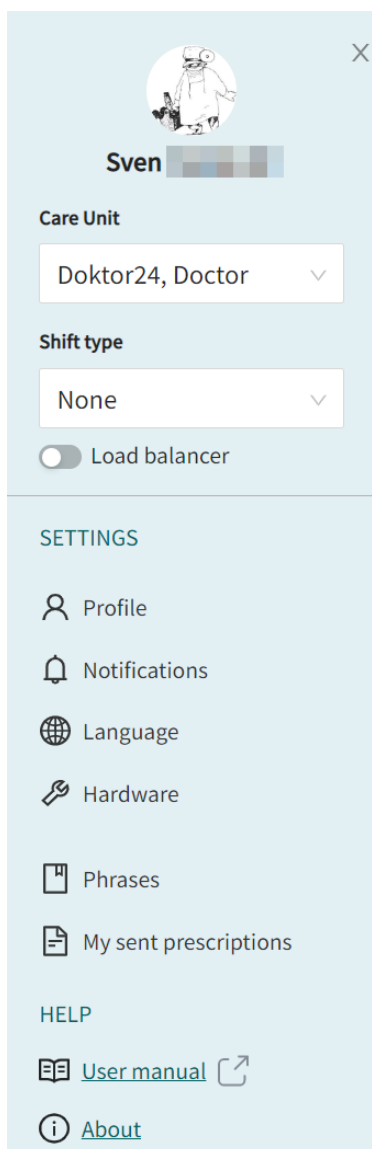
- **Care unit**: The care unit you are logged in to.
- **Shift type**: Here you can select shift type; refer also to Start page [16]
- **Load balancer**: Enable if you are on duty to relieve colleagues when the unit is busy.
- **Profile**: Click on this to edit your profile (your name, title or contact details), see Profile [38].
- **Notifications**: Enables notifications of **_new asynchronous messages_** or **_new patients_**.
  A **_scheduled appointment_** notification notifies you 10 minutes before one of your scheduled appointment starts, and unlike other notifications this is also sent _even_ if you don't have an active shift.
  A phone/SMS notification **Test** link can be seen to the right of **Notifications**.
- **Language**: Specify the language you want to use in Clinic. Communication with the patient is not affected by this selection.
- **Hardware**: Test your hardware.
- **Phrases**: Manage personal phrases. See Managing personal phrases [38].

- **My sent prescriptions**: Lists your sent prescriptions.
- **User manual**: Link to the Clinic User Manual.
- **About**: Information about the products Triage24 and RPM24 and links to their User Manuals.

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

9.10.1. Profile

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

9.10.2. Managing personal phrases

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

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

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

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

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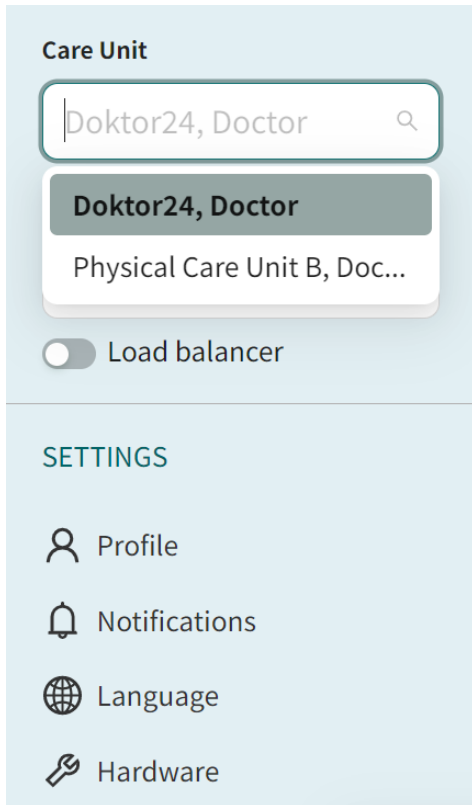
Create phrase

Header

Introduction

Category

Beginning & end ⌄

Phrase content

| Text ⌄ | ☰ | ☰ | B | I | 🔗 |

Warm Welcome!

Cancel   Create

9.10.3. Change care unit

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

    Care Unit

    Doktor24, Doctor

    Doktor24, Doctor

    Physical Care Unit B, Doc...

    ⬤ Load balancer

    SETTINGS

    👤 Profile

    🔔 Notifications

    🌐 Language

    🔧 Hardware

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

    ⚠ You will be logged out and then logged back in to Doktor24

    Cancel   Proceed
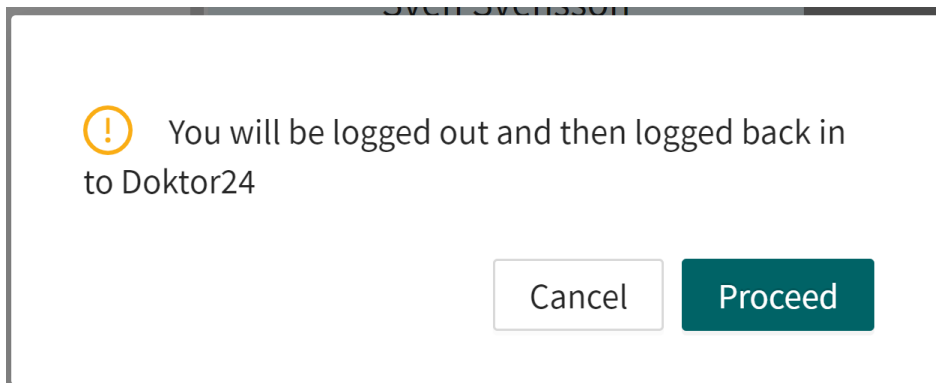
10. Appointments page

10.1. Overview

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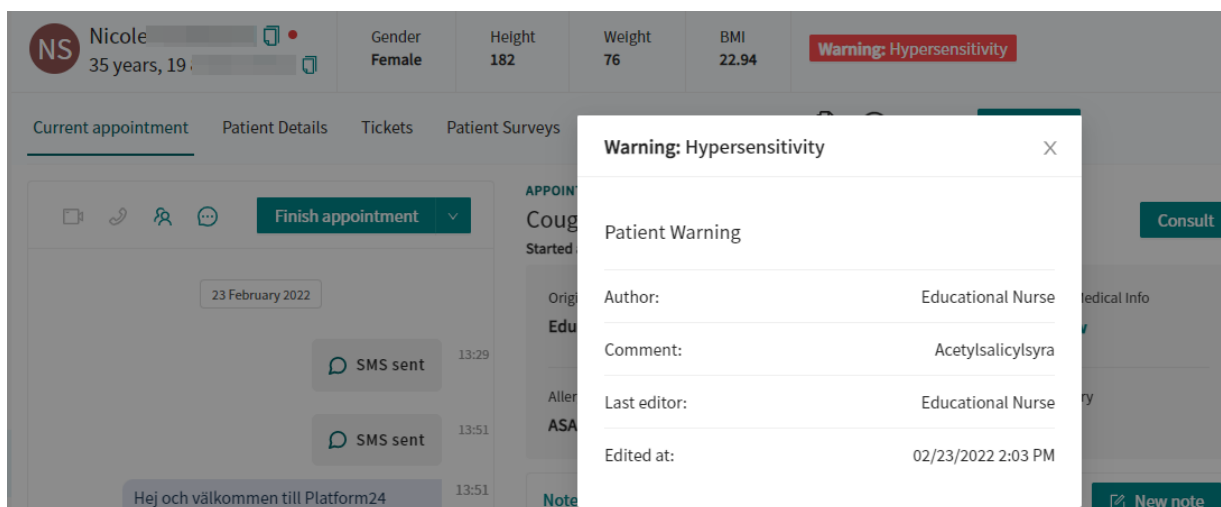

10.2. Page header

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

Any warnings added for the patient are indicated by a red label.

Click on the label for more information concerning the warning:

10.2.1. Basic data

Shows the name, gender and age of the patient. Body measurements are displayed if the patient has filled in their health profile in the Patient app.
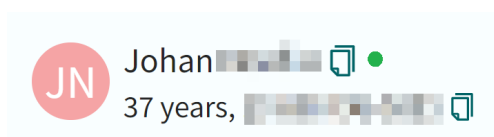
> **TIP**
> Use the Copy icon to copy information such as name or unique personal identifier.

10.2.2. Patient connection status

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

> **NOTE**
> There may be a delay of about 60 seconds.

Table 1. Patient connection status - indicator colors

Color	Meaning
Green	The last contact with the patient was <12 seconds ago

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

10.2.3. Protected identity

Patients can be marked with a protected identity in Clinic, which hides their names and contact details as shown below.


## 10.3. Current appointment

10.3.1. Chat module

Appointments always start in chat mode. When you receive a synchronous appointment in the ledger and enter the chat module, there are no messages, only a button with the text **Start appointment**. The appointment begins when you click **Start Appointment**. When you start the appointment, an automated presentation is sent. You can then chat with the patient by typing in the **Type your message here...** field at the bottom. If you want to insert line breaks in a chat message, press *Shift+Enter*.
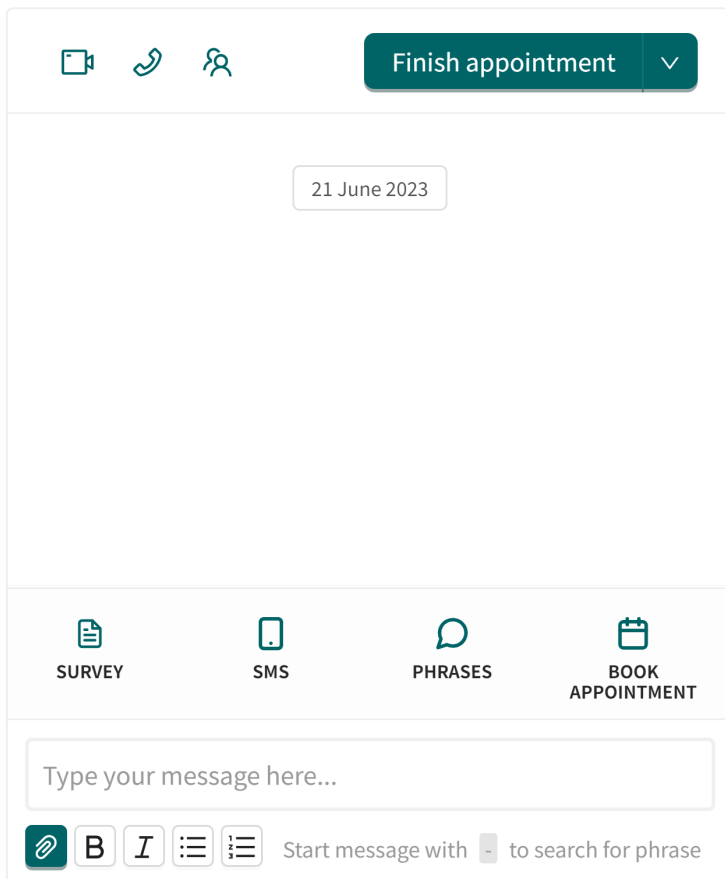
To start audio, click on the icon that shows a handset. To start video calls, click on the icon that shows a camera icon. Ongoing and completed video calls are displayed with a message showing how long they took and who was in them. To see who has been added to the chat, or to invite new guests, click on the "twin" icon.

Below the chat box are a number of icons where you can select to send a questionnaire to the patient (**Survey** button), send an sms, use predefined phrases or to book an appointment.
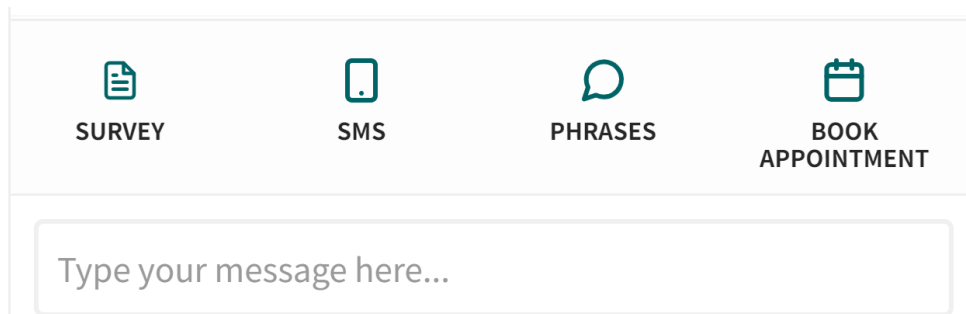
Below the **Type your message here...** field you can select formatting for the message or select to attach a file.

Type your message here...

B | I | ☰ | ☷   Start message with - to search for phrase

10.3.2. Appointment overview

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

If the patient has performed a triage, the results can be viewed by clicking the **Results** link in the **Triage** field.

APPOINTMENT (SYNC PHASE), NEW TRIAGE UI

Cough

Started at 04/14/2023 3:16 PM

Origin	Triage ⓘ	Non Medical Info	
NewtriageUI	**Results**	**Show**	

Allergies	Diagnosis	Medication	Surgery
ASA	**Astma**	**Bricanyl**	**No**

If the patient has any flags, they will be displayed when hovering over the "**?**" next to the **Triage** field.

APPOINTMENT (SYNC PHASE), NEW TRIAGE UI

Cough
Started at 04/14/2023 3:16 PM

Origin	Triage ⑦	Non Medical Info

Flags

Alarming Symptoms

Recommendation

Act in compliance with regional routines for testing (check vaccination and previous COVID) infection protection and contact tracing when necessary

The non-medical information can be opened by clicking the **Show** link in the **Non Medical Info** field.

Non medical info   ✕

Payment

No fee
Refund

Appointment details

Created at	07/15/2022 3:06 PM
Queued at	07/15/2022 3:06 PM
Started at	08/12/2022 12:07 PM

10.3.3. Exit care advice

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

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

10.3.4. Medical record notes

Table 2. Medical record notes overview

1	Notes, the patient's medical history	
2	Original text, based on the questionnaires the patient has answered	
3	New note	
4	Minimize/expand note	
5	Lock/unlock note to edit	
6	Copy record text to clipboard to paste into the medical records system	
7	Expand to modal view	
8	Import original text into the medical history field	
9	Sign and copy	
10	View original answers	

Notes

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

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

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

Primary diagnosis

Search diagnosis codes ⌄

Procedure codes

Search KVA codes

Sign and export

Search results

A00.0 - Kolera orsakad av Vibrio cholerae 01, biovar cholerae

A00.1 - Kolera orsakad av Vibrio cholerae 01, biovar el tor

A00.9 - Kolera, ospecificerad

A01.0 - Tyfoidfeber

A01.1 - Paratyfoidfeber A

A01.2 - Paratyfoidfeber B

A01.3 - Paratyfoidfeber C

A01.4 - Paratyfoidfeber, ospecificerad

A02.0 - Salmonellaenterit

A02.1 - Salmonellasepsis

A02.2 - Lokaliserade salmonellainfektioner

A02.8 - Andra specificerade salmonellainfektioner

Search diagnosis codes 🔍

Procedure codes

Search KVA codes

Sign and export

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

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

Primary diagnosis

A00.0 - Kolera orsakad av Vibrio cholerae 01, biovar cholerae ⌄

Secondary diagnosis 1

Search diagnosis codes ⌄

Procedure codes

Search KVA codes

Sign and export

Suggestions based on appointment condition

J02.9 - Akut faryngit, ospecificerad

J03.9 - Akut tonsillit, ospecificerad

J06.9 - Akut övre luftvägsinfektion, ospecificerad

Search results

A00.1 - Kolera orsakad av Vibrio cholerae 01, biovar el tor

A00.9 - Kolera, ospecificerad

A01.0 - Tyfoidfeber

A01.1 - Paratyfoidfeber A

A01.2 - Paratyfoidfeber B

A01.3 - Paratyfoidfeber C

A01.4 - Paratyfoidfeber, ospecificerad

A02.0 - Salmonellaenterit

Search diagnosis codes 🔍

The note is automatically saved every few seconds.

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

Original text

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

Click on **Show original answers** to see all the questions and answers from each questionnaire the patient has answered before and during the appointment.

This original answers section will also present what part of the interview or questionnaire that has been a part of the patient's triage recommendation logic.
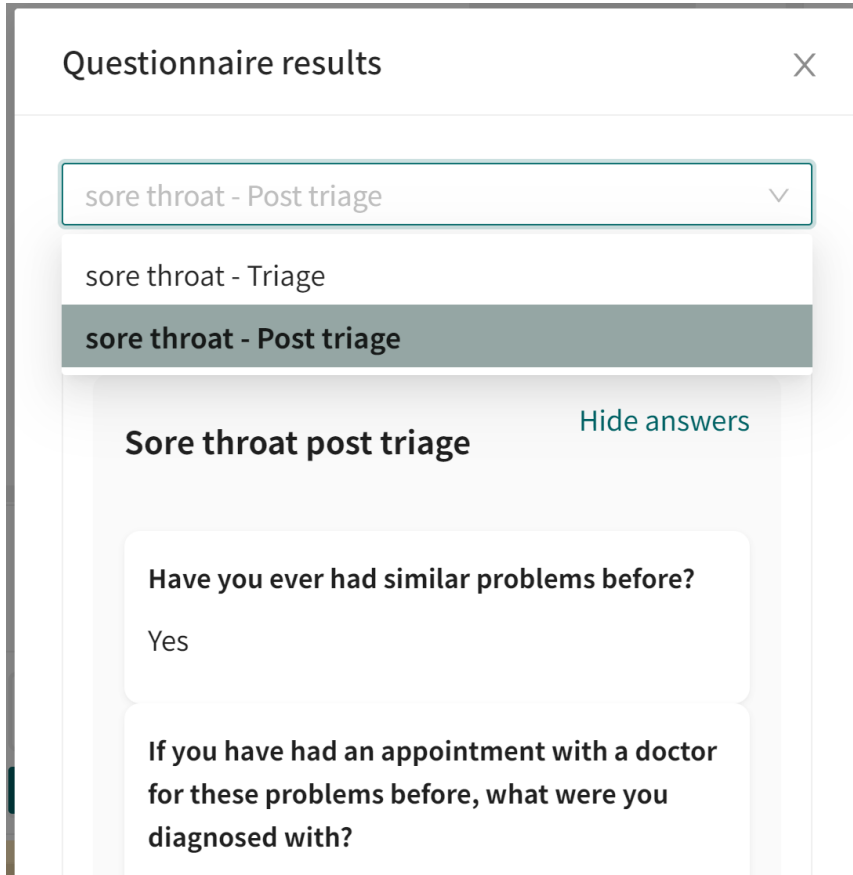
If the patient has filled in more than one questionnaire, select which one you want to read in the drop-down list.

Uploads

Any PDF-files or images that the patient has uploaded via a questionnaire are listed in the **Uploads** tab.

APPOINTMENT (SYNC PHASE), NEW TRIAGE UI

Cough

Started at 04/14/2023 3:16 PM

Origin	Triage ⑦	Non Medical Info	
NewtriageUI	**Results**	**Show**	

Allergies	Diagnosis	Medication	Surgery
ASA	**Astma**	**Bricanyl**	**No**

Notes   Original Text   **Uploads (1)**

Images (1) Download all

Are you able to upload an overview pictur…
Test.png   63.11 KB ⬇

Appointments booked by healthcare practitioners

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

Create doctor visit   ✕

Patient
Andreas ▓▓ ▓ ▓▓ (19 89▓ ▓▓▓)

Primary condition *

Arm injury   ⌄

Survey

Choose questionnaire to send to patient

Chief complaint incl. history of   ⚠ Information to the receiving
present illness   practitioner

Pain in the arm, started in connection with gardening

Previous   **Next**

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

Notes   **Original Text**   ▢

This appointment does not have any patient interviews associated with it

Show original answers

Booking information

Pain in the arm, started in connection with gardening

Multiple medical record notes

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

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

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

Keywords in medical record notes

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

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

Allowed characters in notes

The following characters are allowed in notes:

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

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

Complementary medical history

¤

You must remove the following invalid chars in order to save:

#, ¤

10.4. Patient details

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

10.4.1. Patient info

Here you can see the patient's name and contact details. You can edit contact details and indicate
whether a person has a protected identity.

Here is also where you add new children for which patients can seek medical care.

Patient Info   Health Profile   Warnings   Children

Patient Info for Lars ██████ (19 ██████.)

First Name	Lars
Last Name	████
Personal ID	19 ████
Phone	+46 ████
E-Mail	aa@ ████
Identity Protected	

Edit

NOTE

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

10.4.2. Health profiles

Here you can see a patient's health profile. It cannot be edited. Certain care units are configured to force patients to fill out a health profile the first time they log into the web app, while other units do not, which is why the profile in these cases may lack content.

Patient Info   **Health Profile**   Warnings   Children

Health Profile

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

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

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

Patients can add their children to the system themselves. For more information, refer to Search patient [33].

10.4.3. Warnings

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

Adding a warning

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

Patient Info   Health Profile   **Warnings**   Children

Add or change a warning for the patient affecting the treatment. This warning can be both medical allergies, serious illnesses, or addiction problems. The warning appears above the patient's name. Note that only one warning per patient is currently supported.

No Warnings Found

Add New Warning

2. Click **Add new warning**.
3. In the **New Warning** window, you can fill in:

New Warning   ✕

Patient	Lars _____ (19_____)
Warning Code	Hypersensitivity
Comment	Acetylsalicylic acid

Cancel   Save

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

   All fields are required.

Editing or deleting a warning

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

2. Click **Edit**.

3. To change a warning:
   a. Add your changes to the **Warning Code** and **Comment** fields.
   b. Click **Save**.
4. To delete the warning:

a. Click on the red trash bin.

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

Are you sure you want to delete this item? You must provide a reason.

* Reason:

Reason must be at least 4 characters long!

Submit   Cancel

c. Click **Submit**.

10.4.4. Adding children

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

Patient Info   Health Profile   Warnings   **Dependents**

No patients found

+ Create dependent

2. To add a child, click the **Create dependent** button.

3. Enter the relevant details and click **OK**.

Create dependent for Pontus ▓▓▓▓   ✕

* Personal number

2010▓▓▓▓▓

* Given name

Henrik

* Surname

▓▓▓▓

Cancel   OK

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

Patient Info   Health Profile   Warnings   **Dependents**

⊕ Create dependent

Henrik ████████ (2010 ██ ████) ⧉

First Name	**Henrik**
Last Name	████████
Age	**13**
Date Of Birth	**2010-██ ██**
Gender	████████

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

10.5. Tickets

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

10.5.1. Viewing created tickets

Booking tickets sent to patients can be found under **Tickets** in the menu under a patient's name. You can also see the status of each ticket. If patients have used the ticket and set up an appointment, the status of that appointment can also be viewed.

Booking tickets   Questionnaire tickets

	Condition	Valid from	Expires At	Used at	Status	Created By	
+	Aknebesvär	2022-07-08	2022-07-26	2022-07-08	DONE	Stefan ███	🗑
+	Aknebesvär	2022-12-01	2022-12-07	-	EXPIRED	Sven ████████	🗑

10.5.2. Creating new tickets

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

1. Click **New visit**.
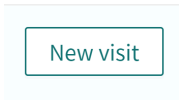
   New visit

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

   Create new visit   ✕

   Who is it for?

   Patient

   Ines ▓▓ (19 76▓▓ ▓▓▓▓▓) ⌄

   Visit

   Scheduled   Scheduled free   Asynchronous

   Consultation

   Consult with another practitioner   Triage

   Tickets

   ▓▓▓▓▓▓▓▓

2. Select the type of ticket under **Tickets** (e.g., scheduled visit, stand-alone questionnaire).
    This opens the **Create new ticket** dialog.

3. Fill in the relevant information, such as the care unit you want to send the booking ticket to.
4. To send a questionnaire to the patient, select the questionnaire in the **Survey** drop-down list.

If a description has been added in the **Description of questionnaire** field in Content Studio, this description will be shown in **Survey** drop-down list. Click the arrow next to the question-naire name to see the description.
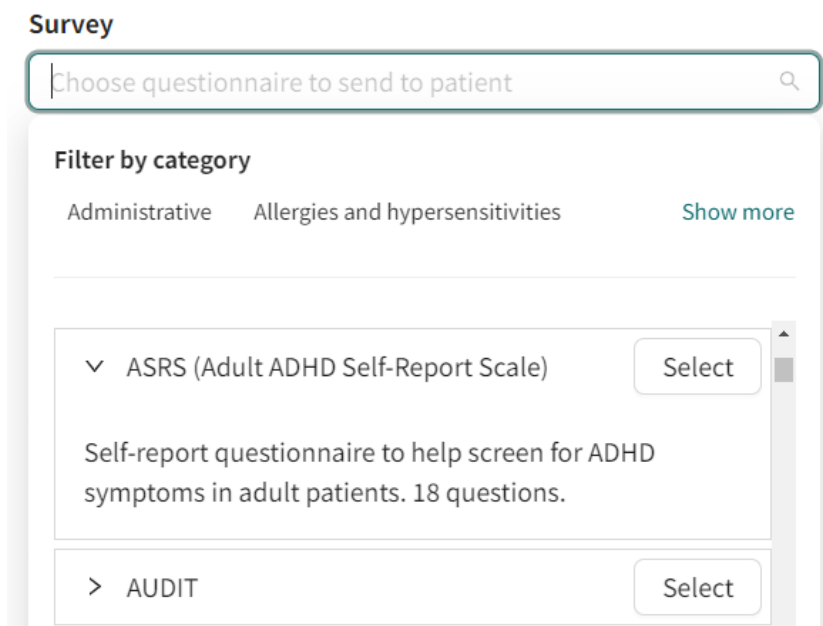
5. To view detailed technical information, click on the gear icon next to the **Send** button in the lower right corner.

6. Click **Send**.

10.6. Recurring questionnaires

Questionnaires that are sent to the patient at regular intervals are shown in the **Repeated Questionnaires** section in the **Patient Surveys** tab.
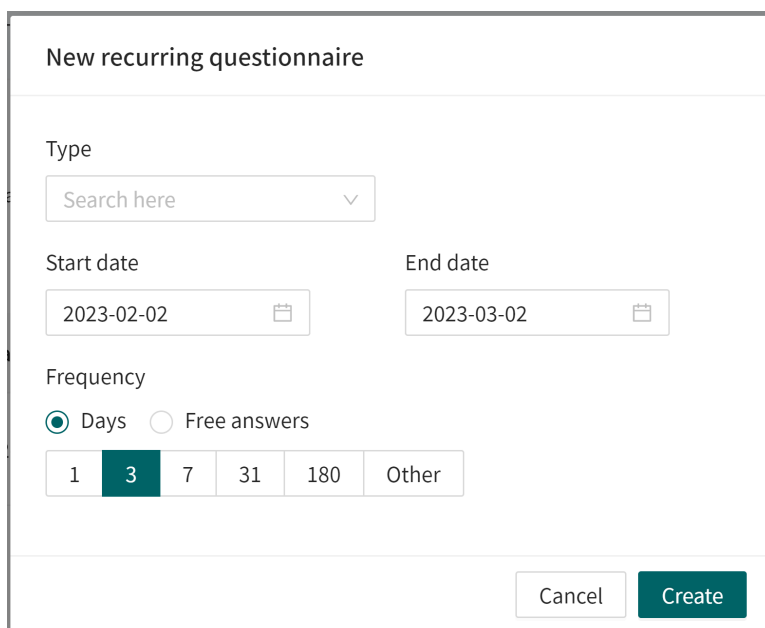
To create a recurring questionnaire:

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

New recurring questionnaire

Type

Search here ⌄

Start date   End date

2023-02-02 📅   2023-03-02 📅

Frequency

◉ Days   ○ Free answers

| 1 | **3** | 7 | 31 | 180 | Other |

Cancel   **Create**

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

3. Click **Create**.

10.7. Questionnaires (irregular intervals)

It is possible to send out a questionnaire at an irregular interval, for example before an appointment when creating a ticket, a visit, or during an ongoing appointment in the chat (via the **Survey** button).

📄
SURVEY

10.8. All appointments

The patient's previous online appointments as well as physical bookings in the system can be viewed under this heading.

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

You can choose to see all contacts in chronological order or group them according to ailment (similar to how email works). If you choose to group by ailment, you can minimise and expand each ailment area with the red arrow in the upper right-hand corner. Appointments from other care

providers within the same partner are only visible if the patient has given their consent. When you click on an appointment from another care provider, you will be alerted to this.

10.9. Prescriptions

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

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

10.10. Health data

It is possible to view metrics for the patient's health data if the clinic has chosen to enable this.

| Patient Details | Tickets | Health data | Previous appointments | Remote Monitoring Plans | | | New visit |

Show Graph	Observation	2023 **17 Feb** 11:32	2023 **17 Feb** 11:31
	Systolic blood pressure	180	180
	Pulse	231	12
	Diastolic blood pressure	110	110

ⓘ Click the "show graph" button in order to see a visual representation

10.11. Consent

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

10.12. Completed video tests

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

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

10.13. New appointments

New visit
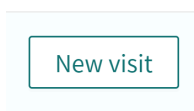
Click **New** to create an appointment for the patient.

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

Create new visit   ✕

Who is it for?

Patient

Ines ▨▨ (19 76▨ ▨▨▨▨▨)   ⌄

Visit

📄 Scheduled   📄 Scheduled free   📄 Asynchronous

Consultation

📄 Consult with another practitioner   Triage

Tickets

📄 ▨▨▨▨▨▨▨

10.14. Certificates

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

Create a certificate

📹 📄👤   New visit
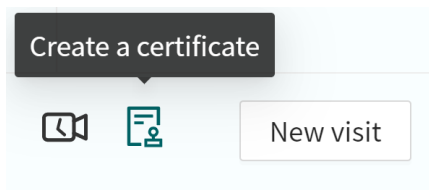
Certificates

×

Create a certificate   List certificates

Generic template ⌄

Generic template

Language

English ⌄

Practitioner

Sven ⌄

Role

Doctor ⌄

Patient

Loise (2001) ⌄

Created at

2023-06-01, 13:28 📅

Patient address

Content

Signature

Edit

Preview

☐ I attest that the above certification is accurate   Send

71

11. Receiving and conducting an online appointment

11.1. Receiving the patient

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

The following features can be used during an online appointment:

11.2. Video calls

*   A video call is a call started during an ongoing chat. If you schedule a video call, it is called appointment call and does not include chat. For information on how to book an appointment call, see Book an appointment call [96].
    Clicking on the video icon will open a video call.
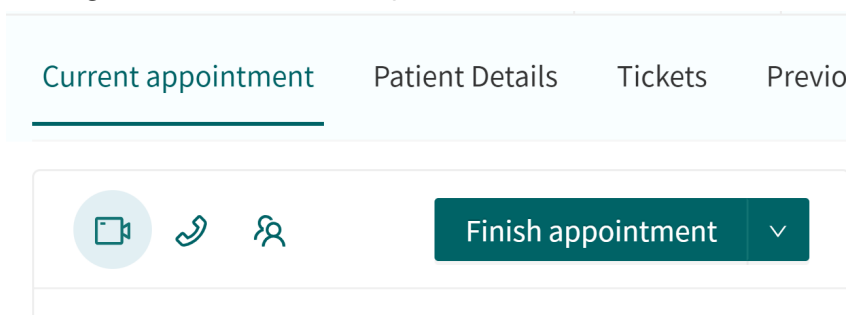
*   Video calls can only be started and ended by healthcare practitioners, never by patients. However, patients must agree to share audio and video in order to join video calls.
*   If patients have turned off their audio, this is indicated by a crossed-out microphone icon at the center of the video image.
*   If the patient refuses the call, information about this is displayed.
*   If the patient cannot be reached, information to this effect is displayed.
*   Ongoing and completed video calls are displayed as a message in the chat box, which also shows the duration of the video call.
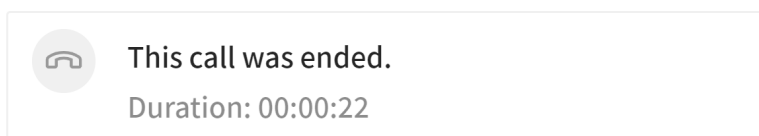
- When you end the video call, you will have the opportunity to report any technical issues. This report is sent for analysis to Platform24.

Call ended

Did you experience any technical issues during the video session?

Yes   No

- During video calls, the video image can be moved with the mouse pointer by left-clicking over the video window, dragging the video image to where you want it.
- At the top of the video, there is a button to extend the video window to landscape mode.

- At the bottom of the video, there are buttons to disable the video feed, mute the sound, show the participants, share your screen, show the video settings and end the call.
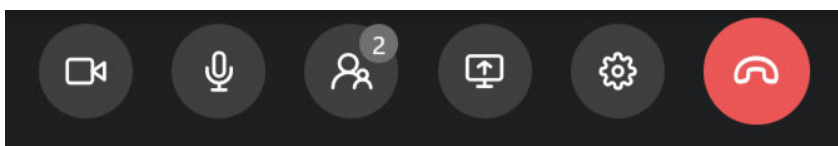
11.3. Sending images or PDF files to patients

The icon to the left of the text field allows you to upload images and PDF files. The chat may seem slow if the files exceed 1 to 2 MB. Maximum file size that can be sent is 10 MB.

NOTE
Some receiving units do not support these file uploads.

11.4. Receiving images or PDF files from patients

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

For more information, see Uploads [53].

11.5. Three-way calls

- You can invite other healthcare practitioners to the video call with the patient. To do so, click the plus sign, click **Add** in the list or use the search function if the person you are searching for is not

visible, and click on the invitation. The receiving party will then receive notification with a link that takes them to the consultation window. This will then be highlighted in Clinic.

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

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

11.6. Inviting colleagues to chat

11.6.1. Inviting colleagues to patient chat

1. Click on the "twin icon" above the chat box.

| Current appointment | Patient Details | Tickets | Previou |

📹 📞 👥   Finish appointment ⌄
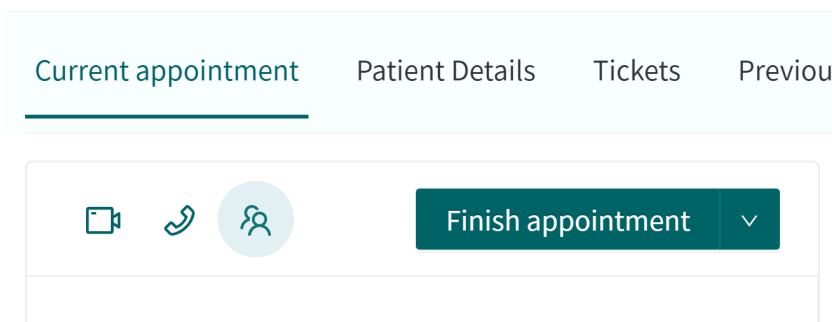
2. In the chat overview, search for the colleague to invite. Hover over the name and click **Invite**.

Chat overview   ✕

Participants (1)   **+ Add practitioner**

Search for practitioners

[▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓, Florence ▓▓▓▓▓ ✕]

(FN) Florence ▓▓▓▓▓▓   + Invite
      Nurse
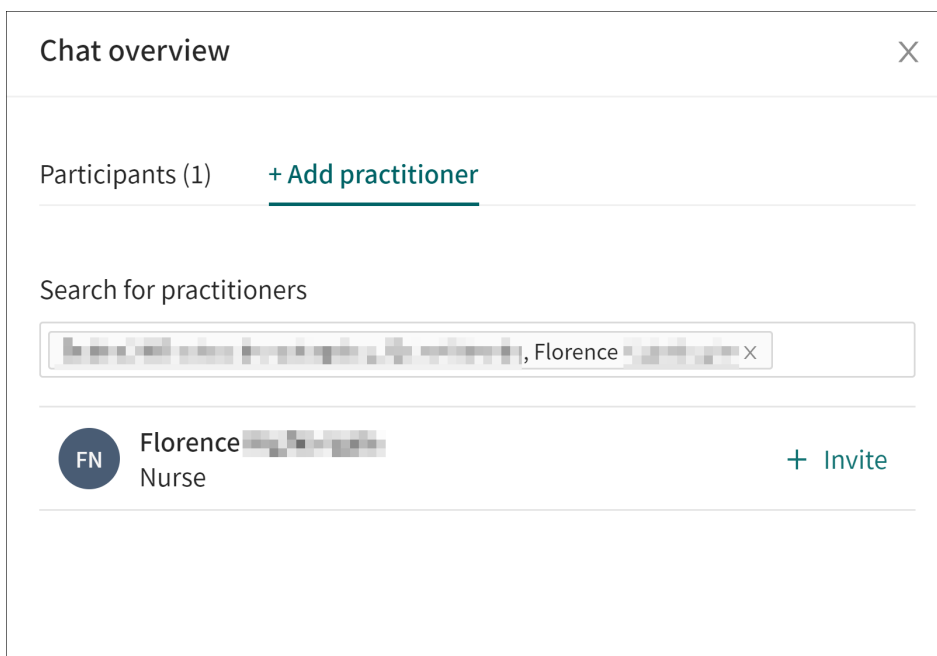
3. You have now invited your colleague to the patient chat.
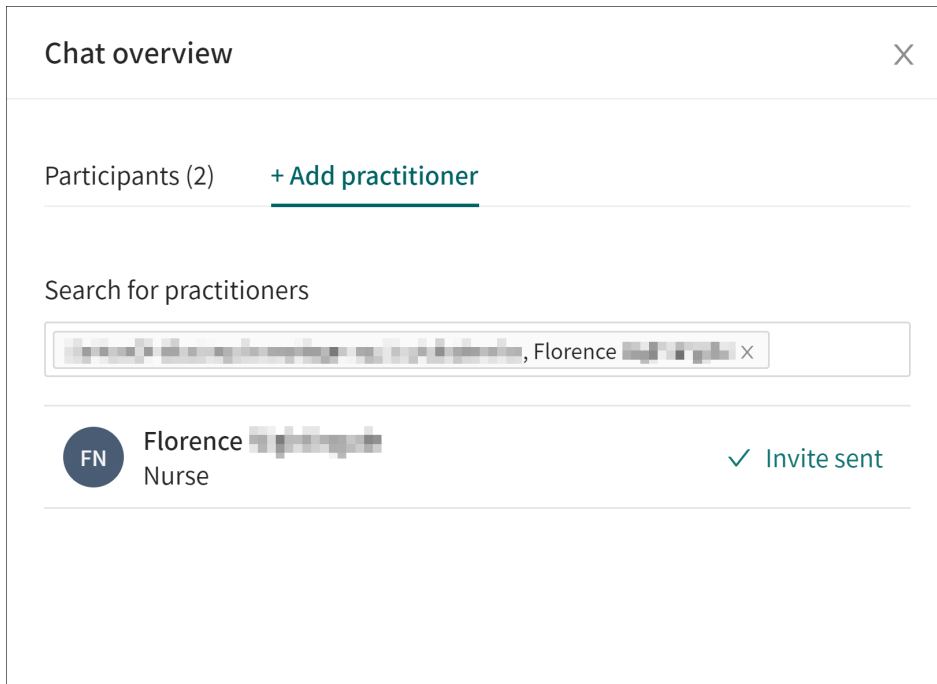
11.6.2. Inviting colleagues to care providers chat

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

1. After inviting the colleague to the patient chat, click on the "chat bubble" above the chat box to open the care provider chat.
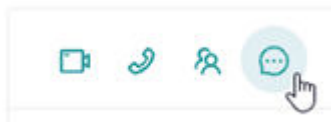
2. The care provider chat is displayed in the right bottom corner and you can chat with the colleague.
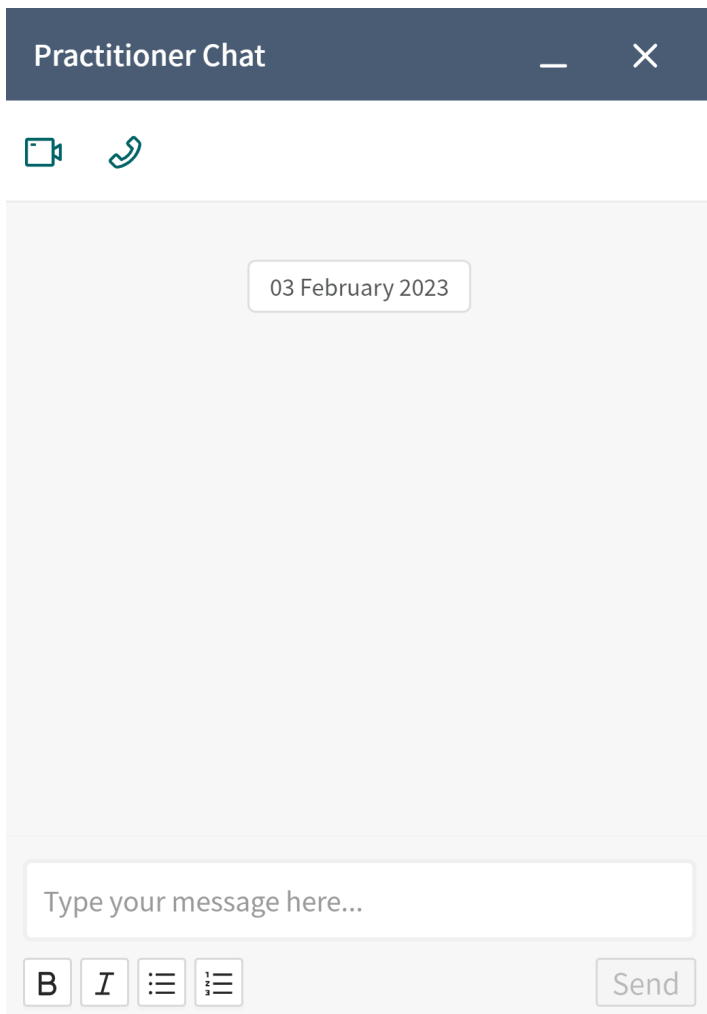
3. New messages are indicated by a number.

11.6.3. Seen by colleagues invited to chat

1. A pop-up window appears in Clinic if you are invited to a patient chat.
2. A new tab appears, **Third party**.
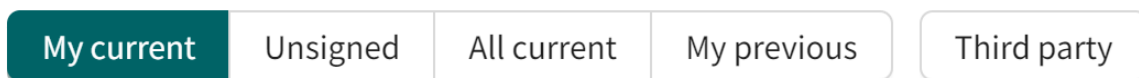
3. Select the tab and click on the current patient to open the patient chat.
4. Click on the "speech bubble" to also open the care provider chat.
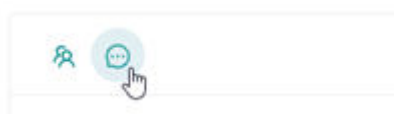
11.7. Ending appointments

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

To end the appointment, click on the **Finish appointment** button above the chat box.
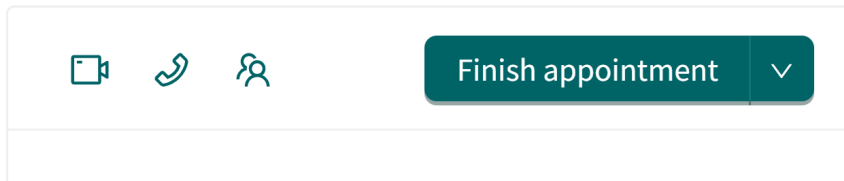
This opens the **Finish appointment** dialog.

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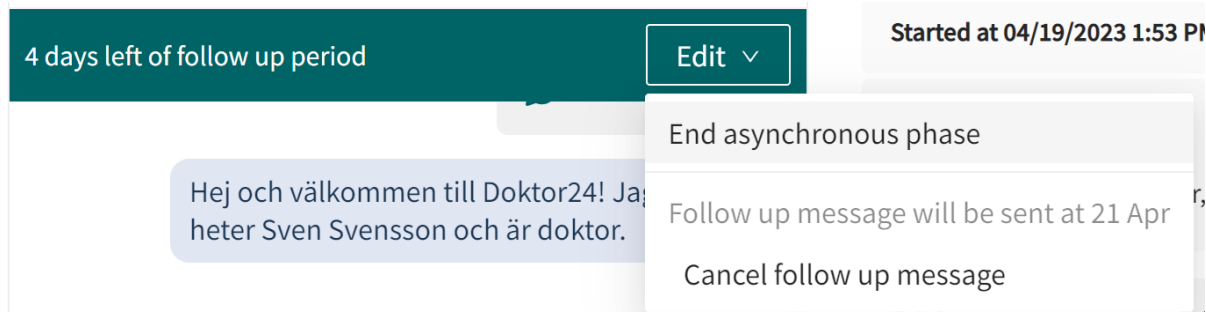
- Creating an attestation
  It is possible to create an attestation at the end of the appointment, if the care unit has chosen to enable this function. Then enable **Create attestation from this appointment**.

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

- Click **Finish**.

After ending an appointment, you will be given the choice to **Go to appointment list** or **Continue with this appointment**. If you choose to continue with the current appointment, you will remain in the chat and can complete your medical record note, click on **Sign and export**, and then paste the text into your regular journal system. If you choose to go to the emergency ledger, you will return to the start page and can receive the next patient.
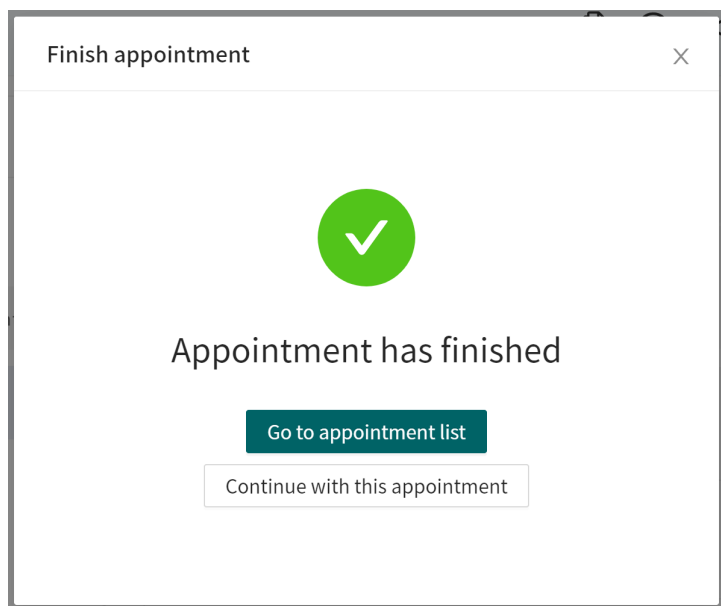
11.8. Parallel chats

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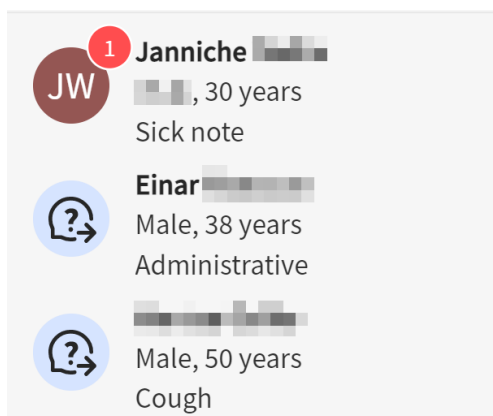
12. Handing over or transferring appointments

12.1. Overview

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

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

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

1. Handing over an appointment during a synchronous appointment
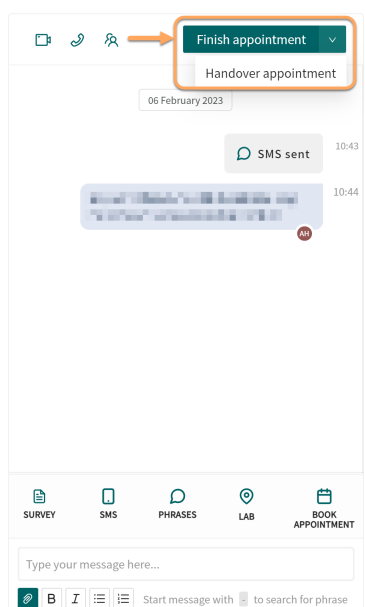
2 a. Handing over an appointment before the appointment is initiated, before clicking **Receive**.
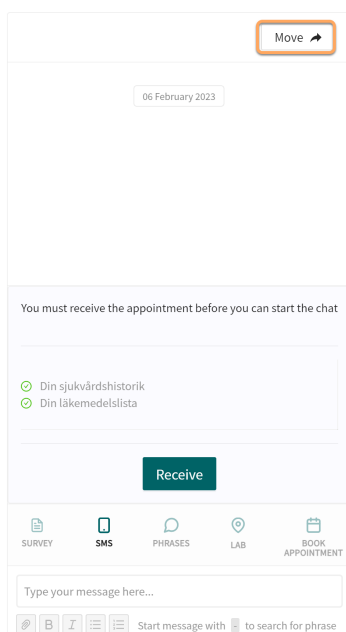
2 b. Handing over an appointment before the appointment is initiated, after clicking **Receive**.
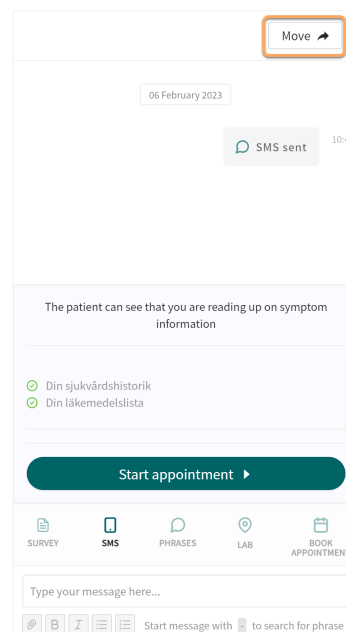
To reduce the risk of an appointment being lost in handling, the person receiving the appointment must approve the transfer/handover before it is removed from the original healthcare practitioner's list
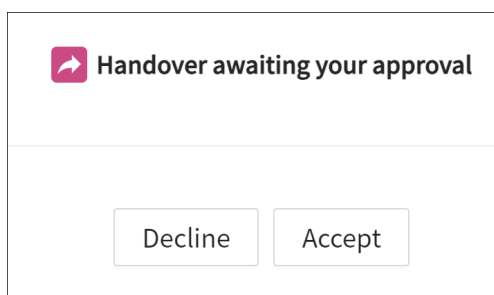
In the Patient app, the transfer process is displayed as a system message, e.g. "Care provider A has transferred the appointment to care provider B". The patient will also receive a text message informing them that a new provider has taken over the appointment.
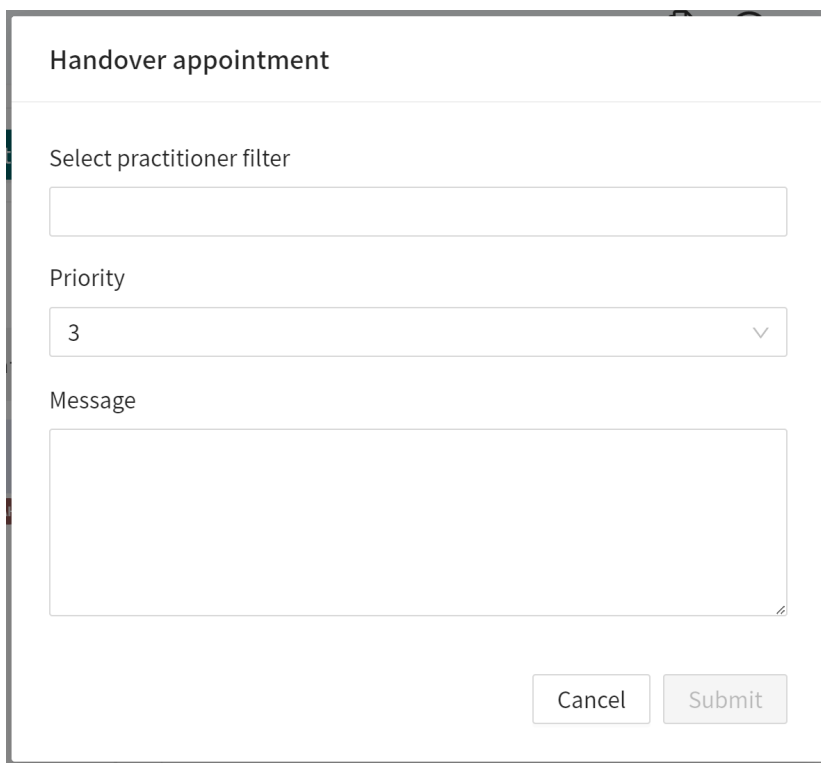
12.2. Handing over during an ongoing synchronous appointment

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

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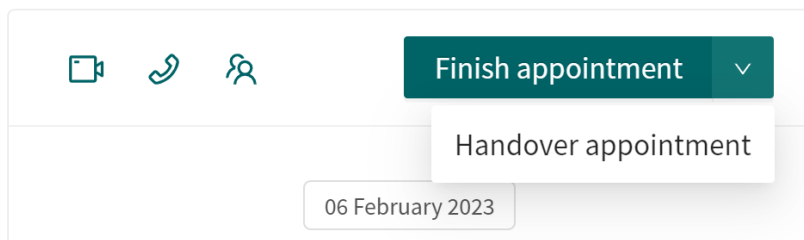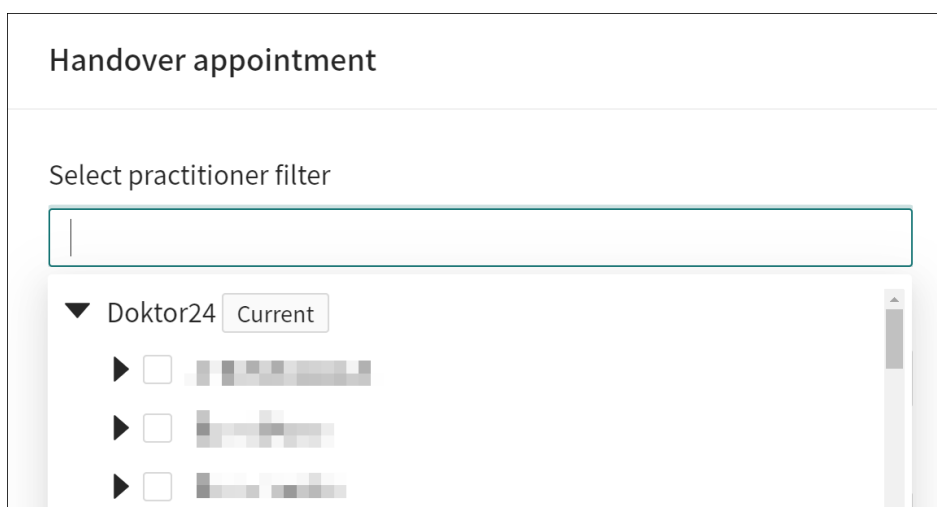
This opens the **Handover appointment** dialog.

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

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

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

4. Click **Submit**.

12.3. Transferring appointment before receiving

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

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

Move ➤	**Move** ➤
06 February 2023	06 February 2023
	SMS sent 10:43
You must receive the appointment before you can start the chat	The patient can see that you are reading up on symptom information
⊘ Din sjukvårdshistorik ⊘ Din läkemedelslista	⊘ Din sjukvårdshistorik ⊘ Din läkemedelslista
Receive	**Start appointment** ▶
SURVEY SMS PHRASES LAB BOOK APPOINTMENT	SURVEY SMS PHRASES LAB BOOK APPOINTMENT
Type your message here...	Type your message here...
🔗 B *I* ☰ ☰ Start message with - to search for phrase	🔗 B *I* ☰ ☰ Start message with - to search for phrase

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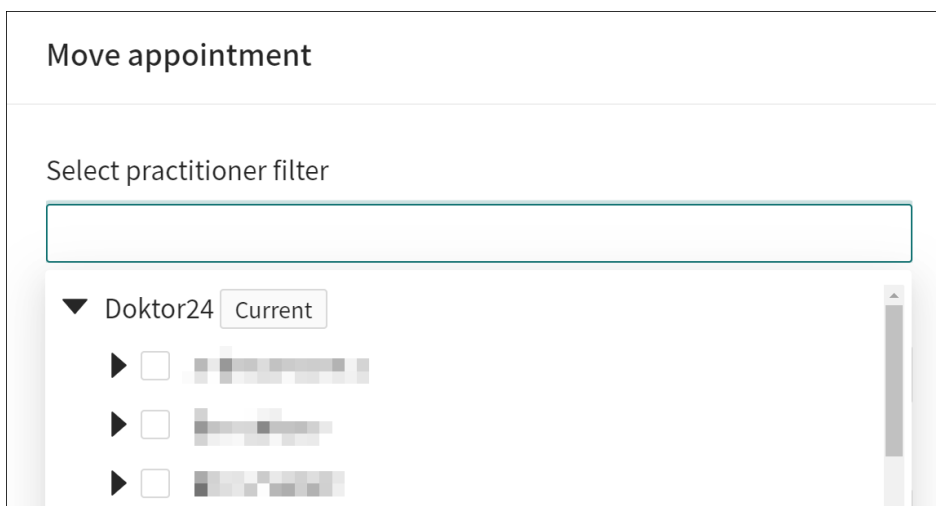
2. Select the receiving practitioner via the **Select practitioner filter** drop-down menu. Your own care unit is marked as **Current**.

> **NOTE**
> If you know the name of the person you want to hand over to, you can search directly for their name go directly in the **Healthcare practitioners** field.
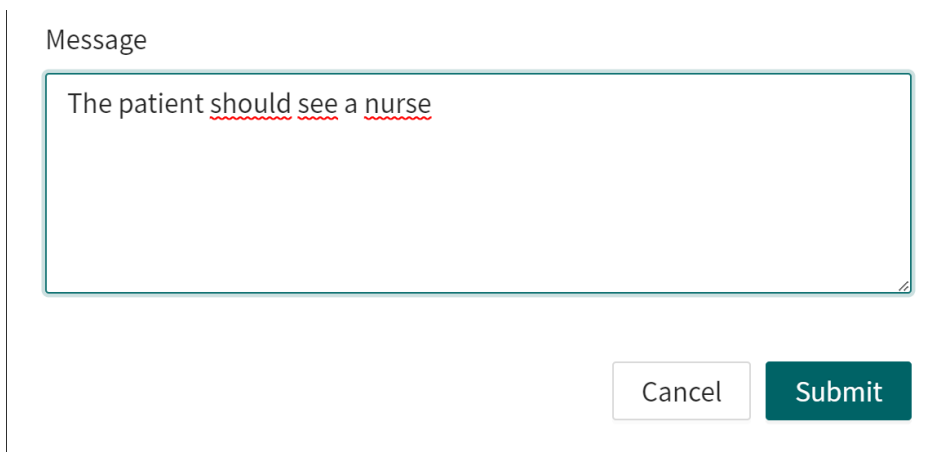
3. Enter a message for the receiving party in the **Message** field. This information is not shown to the patient. Why a patient is being handed over is only available between healthcare practition-ers.

Message

The patient should see a nurse

Cancel   Submit

4. Click **Submit**.

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

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

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

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

3. Select **Physical appointment scheduled**.

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

5. Click **Next**.

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

Create doctor visit   ✕

Patient

Anna ▓▓ ▓ (19 91 ▓▓ ▓▓)

Date	**Choose care unit**
Apr 25 - 30 🗓	Doktor24 ⌄

Role	**Practitioner**
Doctor ⌄	Sven ▓▓ ▓▓ ⌄

Tags

Filter by tags

Available times for Doktor24

Tuesday 2023-04-25

10:00	10:30

Wednesday 2023-04-26

10:00	10:30

Previous   Next

7. Click **Next**.

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

Create doctor visit   ✕

Visit details:

Patient:	Anna ▓▓▓▓
Issue:	allergy
Practitioner:	Sven ▓▓▓
Care Unit:	Doktor24
Role:	Doctor
Time slot:	2023-04-25 10:00

Previous   Submit

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

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

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

14. Taking over an asynchronous appointment

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

APPOINTMENT (ASYNC PHASE), DOKTOR24

Administrative

Started at 02/06/2023 2:49 PM

[Take appointment]   [Consult]

Healthcare personnel

Luke ████████ ████████, Doktor24

Sven ████████, Doktor24 (Assigned practitioner) ●

Origin	Priority	Non Medical Info
Doktor24	3 ⌄	**Show**

Allergies	Diagnosis	Medication	Surgery
—	—	—	—

Notes   Original Text   [✎ New note]

⌄ **Luke** ████████ ████████
Created at: 2023-02-06 14:49:43

15. Escalated appointments

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

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

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

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

16. Registering new patients

Any patients who have not previously applied for your online service must be registered before they can book an appointment.

> **NOTE**
> How to add children is customer-specific. Talk to your superuser or internal support if you have questions about this.

1. Enter the patient's unique personal identifier in the search field.

   Search patient ✕

   1992▓▓▓▓ 🔍

   To create patient type whole personal number ⓘ

   👥 No patient found
   Create patient with PN 19 92▓▓-▓▓

2. If you searched for a patient that was not found in the system, the **Create patient** option is displayed. Click on **Create patient** and enter name and contact details to register the new patient.

   Add patient/caregiver

   * Personal number

   1992▓▓▓▓

   * Given name   * Surname

   * Phone number   Email

   Cancel   Create

3. Click **Create**.

Add patient/caregiver

Close   Go to the patient
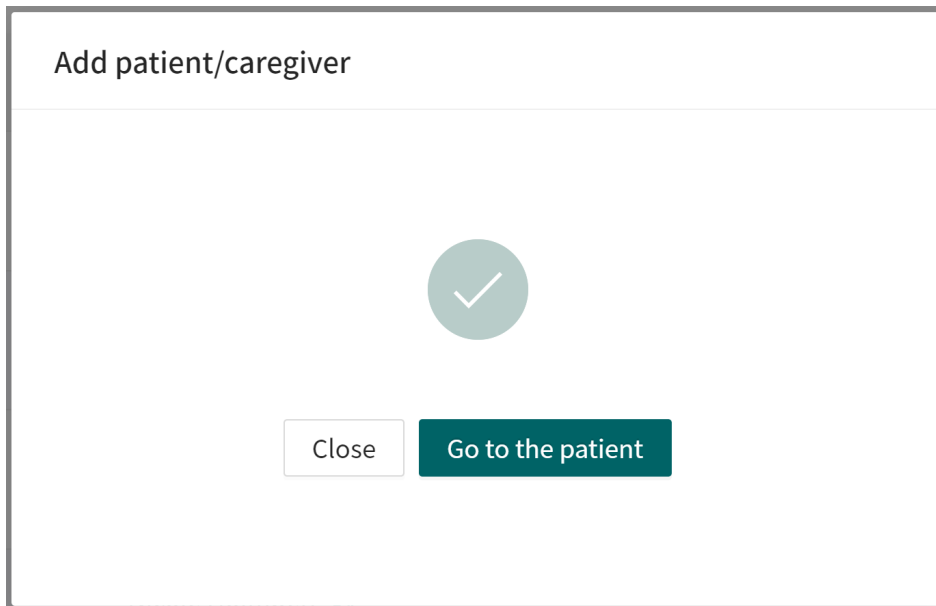
4. In the next dialog, click **Go to patient**. This will open the same view as when you search for an existing patient.

17. Booking an appointment for a patient

17.1. Overview

There are three different types of appointments:

- Scheduled
- Scheduled free
- Asynchronous

To book an appointment:

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

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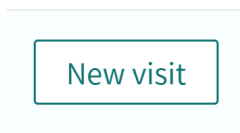
5. Select the appointment type for which you want to book the patient.

Visit

Scheduled   Scheduled free   Asynchronous

Physical appointment dropin

Physical appointment scheduled
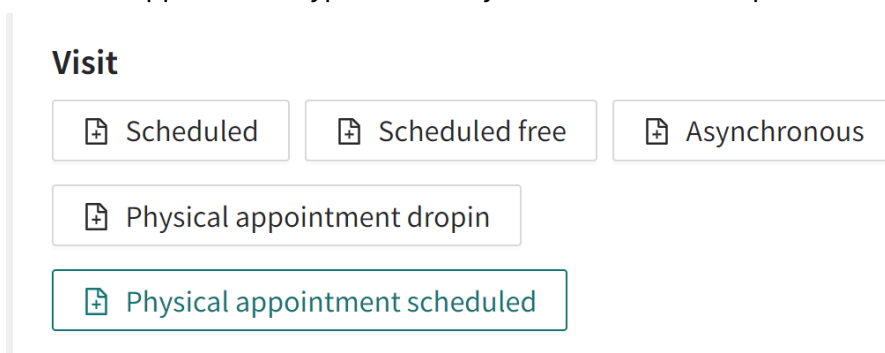
17.2. Appointment types

17.2.1. Scheduled

If you choose to book using the *Scheduled* timeslot type, you have to book at a time previously created in **Timeslots** at your care unit, for the profession you wish to book.

These timeslots cannot be addressed to a certain named person. It is instead the healthcare practitioners/profession working in Clinic and receiving online appointments at that time who will receive the appointment.

17.2.2. Scheduled free

If you choose to book using the *Scheduled free* timeslot type, you decide for whom (named person) the appointment should be booked. These timeslots are not linked to the timeslots you have added to the **Timeslots** in Clinic, but if you choose the **Scheduled free** timeslot type, you must, at the same time, book the timeslot in your regular appointment book with the person for which you have chosen to book the meeting.

17.2.3. Asynchronous

If you choose **Asynchronous**, it does not mean that you are booking the patient for an online timeslot, but this option results in you sending an asynchronous message.

17.2.4. Appointment call

A patient appointment the patient is scheduled and the practitioner is able to invite guests in advance.

17.3. Booking a scheduled visit

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

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

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

17.4. Sending a provider-initiated asynchronous message

To send an asynchronous message to the patient:

1. Select appointment type **Asynchronous**.

2. Click **Next** and then **Submit** and select **Go to appointment**.

3. In the chat module, write and send the text message.

4. The patient will receive a text message with information on how to log in using the link provided in the text message, to read the message.

5. How much time patients have at their disposal to answer is shown at the top of the chat window. To prevent patients from answering, click **Change** and then **Exit Asynchronous Phase**.

6. By typing a reply in the chat or clicking **Mark as done**, the visit disappears from the log. Each time the patient writes in the chat, the appointment is activated and reappears in the ledger.

17.5. Book an appointment call

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

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

To book an appointment call via the appointment view or via the patient profile:

1. Click the **New visit** button.

New visit
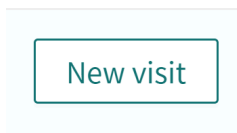
2. Continue with step 4 in the instruction below.

To book an appointment call by searching for the patient in Clinic:

1. Click on **Search patient** button in the left menu bar.
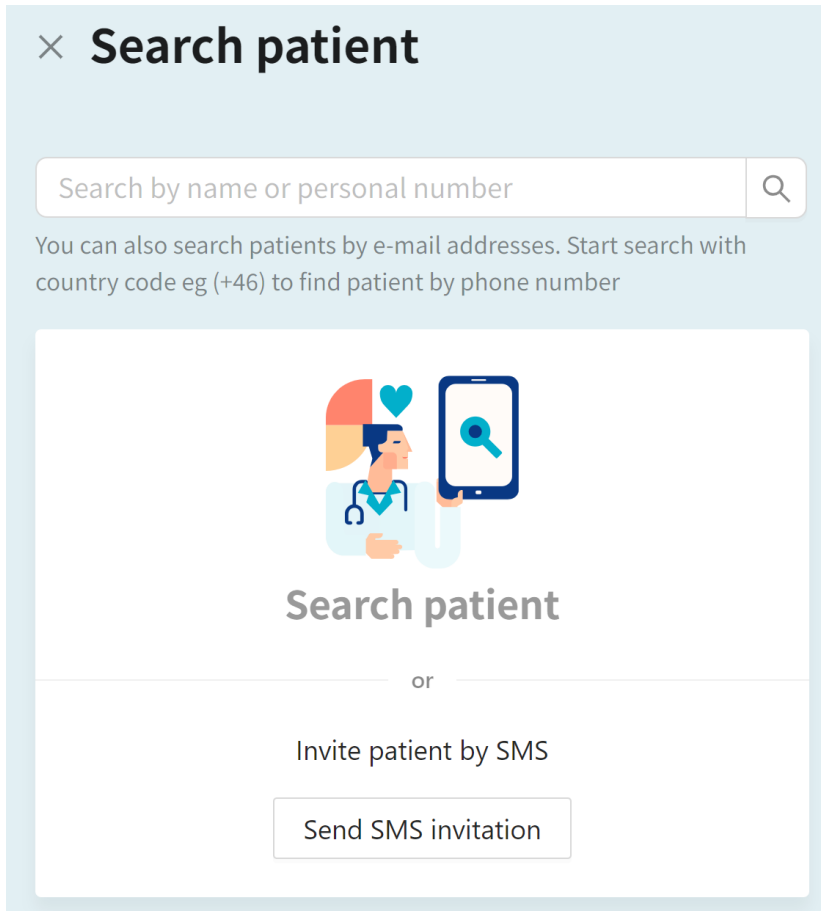
2. Write the name or unique personal identifier of the patient in the **Search patient** field and click the search icon or press enter.
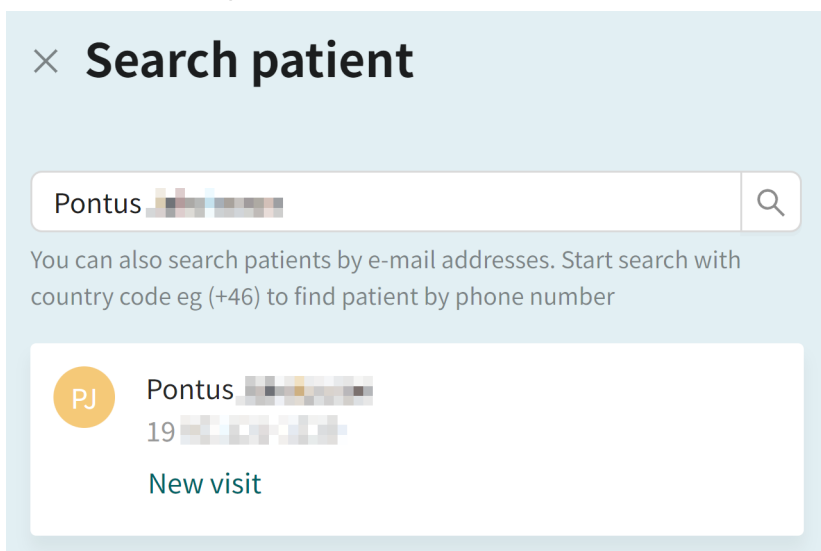
3. Click **New visit** below the patient's name in the search result.

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

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

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

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

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

Create a new video call appointment ✕

1. Appointment details — 2. Participants — 3. Confirm and send

Meeting details

Primary condition

Acne problems ⌄

Date and time

Tuesday, 2 May 2023 at 10:00

Cancel   Next

7. Click **Next**.

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

Create a new video call appointment ✕

1. Appointment details — 2. Participants — 3. Confirm and send

Add participant

Guest   Healthcare personnel

Guests will not be able to see any patient details.

Name

Surname

Invite by ⓘ

Mobile number

Email

Add

Back to details   Cancel   Next

Participants (2)

Patient

Mickis ▮ ▮ ▮
19▮▮▮▮

Guests

Erik ▮▮▮ ▮▮   ✕
+46 ▮▮ ▮▮

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

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

101

11. Review and verify that all details are correct.

12. Click **Create and send invites** to complete the booking, or **Cancel** to cancel the booking.

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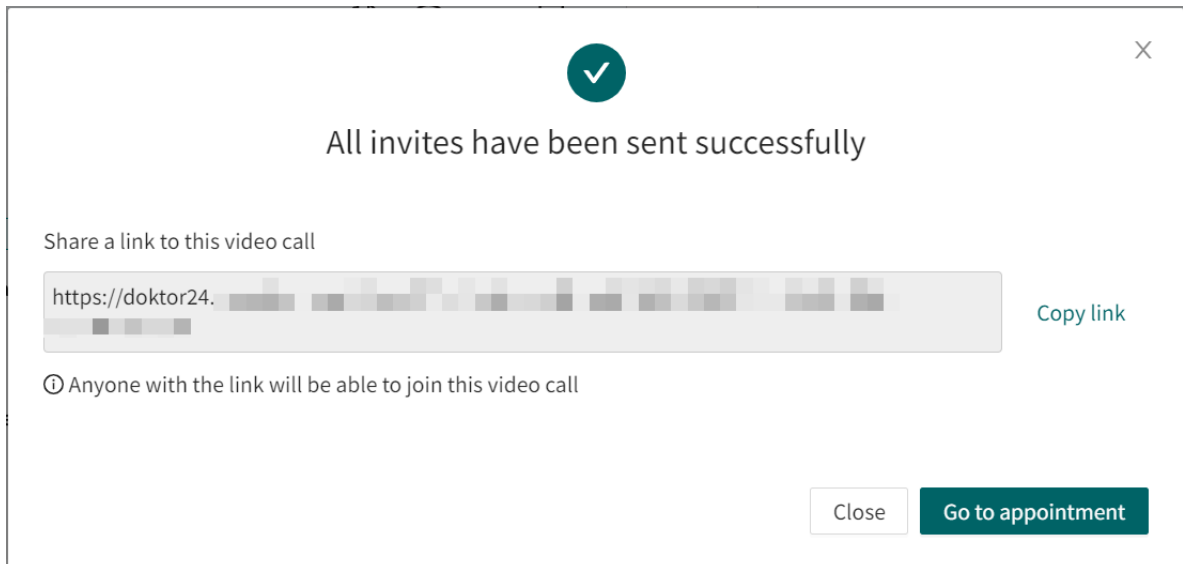
14. Click **Close** to close the booking view, or **Go to appointment** to go to the appointment view for the visit.

18. Rebooking a patient

18.1. Change time or cancel appointment

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

What happens when you click **Change Time** depends on how the appointment is booked. If the appointment is booked using the **Scheduled timeslot** type, a window pops up showing available timeslots which can be selected. If the appointment is booked using the **Scheduled Free** timeslot type, you will actively need to change to a new time of your choice.

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

18.2. Appointments booked by healthcare practitioners

In order to clearly distinguish between appointments booked by healthcare practitioners and appointments booked by patients themselves, this will be clearly visible in the **Medical record notes**, see also Appointments booked by healthcare practitioners [53].

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

19. Ending a shift in Clinic

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

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

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

3. Read the information and warnings for your shift.

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

4. Log out from Clinic:
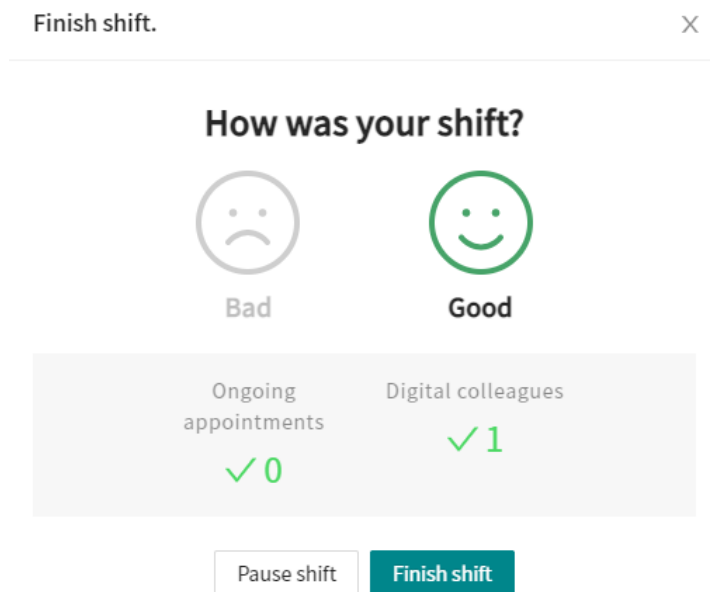
a. **Pausing a shift**: Enables you to log out, but with an active shift, allowing you to stay visible to colleagues and still receive notifications.

b. **Ending a shift**: Enables you to completely finish your shift, and no longer be visible to colleagues and unable to receive notifications.

20. Technical issues

20.1. Overview

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

20.2. For practitioners

- Make sure you use Chrome as your browser.
- If there is no sound, and the computer has an F1 key with a sound icon, make sure the F1 button is not enabled.
- Test that the microphone and camera work using the test function in your user profile. For more information, refer to Your profile [37].
- If the sound and video do not work and you have installed a new microphone and camera, contact your IT support.
  - Make sure you have a good connection and that you are connected to the healthcare unit's network. If necessary, make sure your internet is fast enough by testing it at https://bred-bandskollen.se.
  - To use Clinic, you must have at least 3Mbits/s or 3G mobile connection. However, the recommended internet speed for best performance is at least 5Mbit/s or 4G mobile connection.

20.2.1. Video

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

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

If it still does not work, try the following:

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

20.2.2. Clear cache (web history)

Cache contains temporary files that your browser saves. By clearing the cache files (= browsing history), certain issues can be solved, such as if you can't log in, you have multiple patients where

you can't see any messages, Clinic loads very slowly, nothing happens when you try to click somewhere where normally it works, or if you can't see when you are not booked.

Empty the cache as follows:

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

20.3. For patients

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

21. Technical equipment

21.1. Overview

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

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

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

21.2. Hardware

Hardware refers to a microphone and a camera.

21.2.1. Setting up and testing your microphone

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

2. Click the **Hardware** option.

   SETTINGS

   👤 Profile

   🔔 Notifications

   🌐 Language

   🔧 Hardware

3. Select the **Audio** tab.

   👤 Profile　　🔔 Notifications　　🔧 Hardware　　📖 Phrases

   Settings

   📷 Camera

   🎤 Audio

   Mic

   Standard - ▓▓▓▓▓▓ ▓▓▓▓▓▓▓ (Realtek(R) Audio)　⌄

   Speakers

   Standard - ▓▓▓▓▓ (Realtek(R) Audio)　⌄
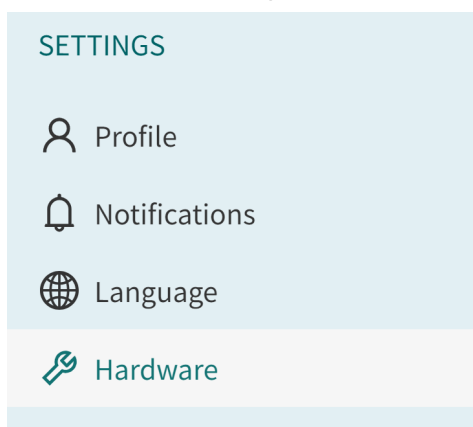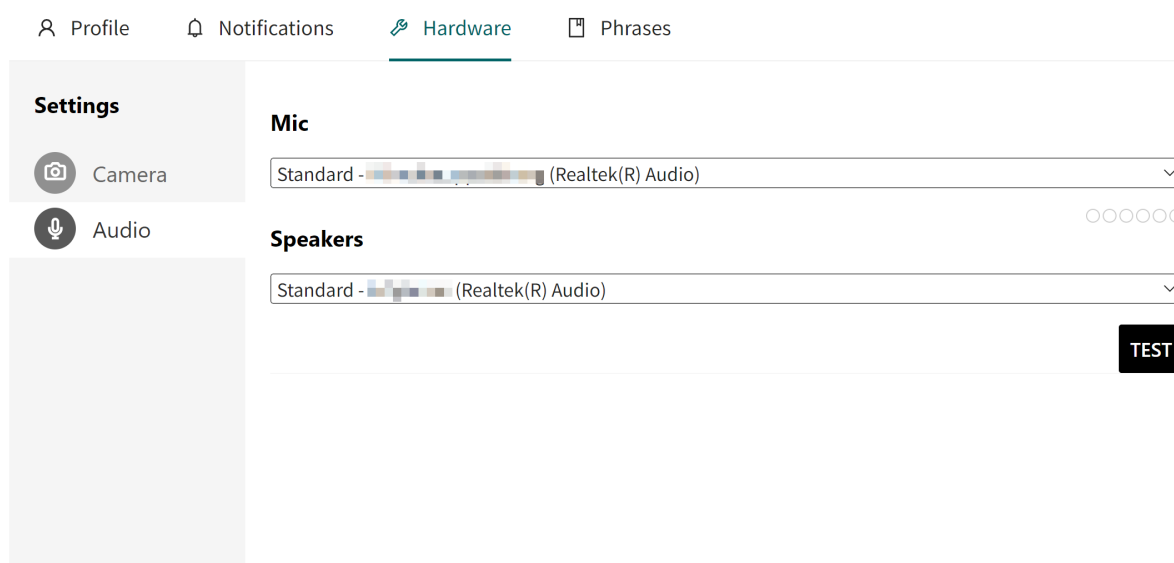
   TEST

4. Select the microphone you want to use from the list (if you have several to choose from).

5. Say a few words to check they are recorded (indicated by the dots) and that the sound level is good.

21.2.2. Setting up and testing your camera

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

2. Click the **Hardware** option.

SETTINGS

    Profile

    Notifications

    Language

    Hardware
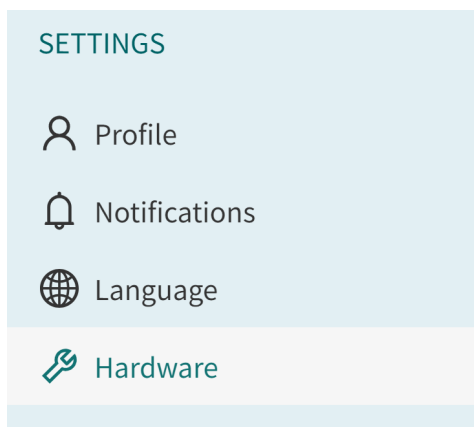
3. Select the camera you want to use from the list (if you have several to choose from).

Profile   Notifications   Hardware   Phrases

Settings

  Camera

  Audio

Camera

Integrated Webcam (1bcf:28c4)
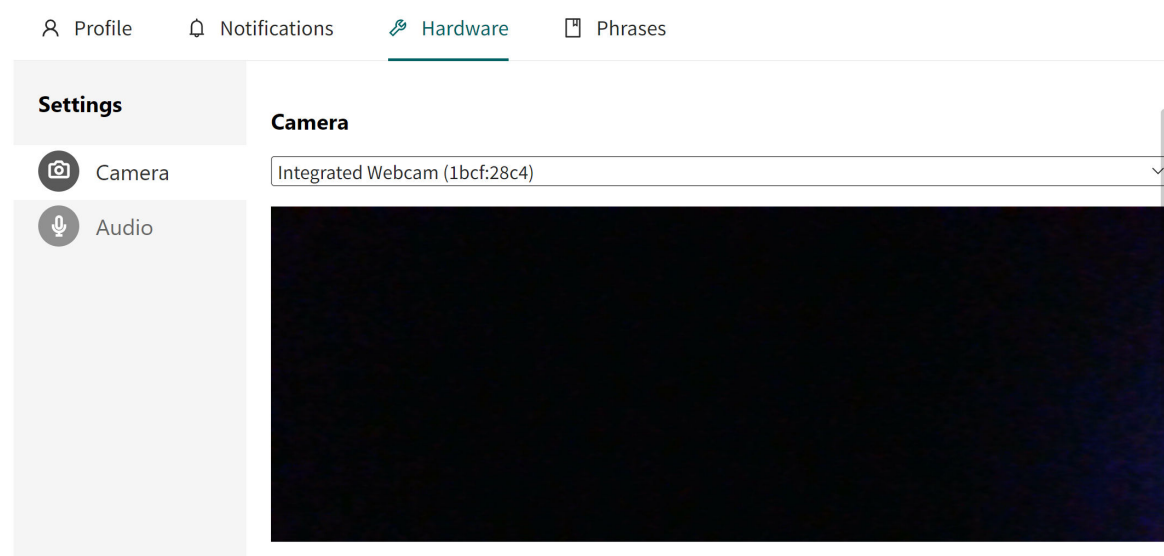
4. In the box you can see if the camera is active and exactly what is displayed.

21.3. Check that video and audio are enabled on Chrome

1. Log in to Clinic.

2. In *Chrome*, click the padlock icon to the left of the address bar.

3. Change to allow camera, microphone and notifications.

4. Refresh the page for the changes to take effect.

22. Support

22.1. Overview

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

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

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

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

22.2. Checklist

Checklist when contacting support:

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

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

23. Glossary

Terms that are important and to be aware of

Administrator	Those at your care unit who administer employee access rights for Clinic, and who are responsible for entering any autophrases the care unit requires in Clinic.
Asynchronous contact	See *Asynchronous messages*.
Asynchronous messages	Refers to when healthcare practitioners and patients are not in sync, i.e. they are not expected to be active at the same time. Outside a digital context, correspondence by letter is a classic example of asynchronous contact. Digital contexts refer to sending a chat message, but where the other party does not expect a direct response.
	Asynchronous messages/asynchronous contact are used, for example, to send test results. Similarly, asynchronous messages/asynchronous contacts work well where you want to give patients the opportunity to get back to you after a completed online appointment. For example, you may in the case of a synchronous appointment wish to wait and watch, but ask the patient to return after X number of days to report on the progress of the condition, but you do not expect a direct response.
Chrome	A web browser (such as Internet Explorer and Safari).
Clinic	The healthcare practitioner's platform, where you receive and communicate with the patient.
SITHS card	The white e-id card that most healthcare practitioners use for identification and logging into medical records systems and other healthcare services.
Superuser	Those at your care unit who are very familiar with and know how to use Clinic's functions. Contact your superuser if you have questions about the functions in Clinic.
Synchronous contact	See *Synchronous visits*.
Synchronous visit	Refers to when healthcare practitioners are in sync with patients, i.e. they are active at the same time. A physical meeting or phone call are classic examples of synchronous appointments. In a digital context, the term refers to chat meetings and video meetings (drop-in appointments and booked timeslots).
unique personal identifier	For practitioners: can be for example e-mail, HSA-ID
	For patients: can be for example e-mail, personal identity number, insurance number, BSN
URL	People often talk about URLs in digital contexts. The URL is an address of a web page. Each patient appointment in Clinic has a

specific URL. You will see the URL associated with a specific patient appointment in the address bar in the chat module.

24. User Manual versions

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