

# EUROKING Patient Health Record System Administration

Training Department

18/05/2022

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## Copyright

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# Introduction

## Purpose

The purpose of this document is to explain the functions of PHR Admin, how PHR relates to EuroKing, and how to configure the PHR Patient application.

## Audience

This document is intended to be used by EuroKing System Administrators.

## About PHR

[Personal Health Record](#) (PHR) is an online application which provides patients with access to their maternity record. The solution enhances the level of clinical support available to patients by:

- Enabling a patient to access their full maternity record without the need to carry paper.
- Providing a clinician access to essential data to support decision making for the provision of effective care.
- Providing access to data across the local maternity system.

## What does an administrator do?

As an administrator, you will authorise patient access to their pregnancy notes via the PHR application. You will also configure, manage, and monitor the following items:

- Contact information
- Useful websites
- Email templates
- Care plans
- Patient data warning
- Questionnaires
- Reports
- Recommendations
- Trimester-specific information
- Audit logs

## Who can use PHR?

There are two kinds of PHR user:

- Patients who have been granted access to their own Personal Health Record.
- Hospital staff who are members of the EuroKing administrator group.

### Tip:

Supported Browsers: Chrome, Internet Explorer 11, Edge, Firefox.

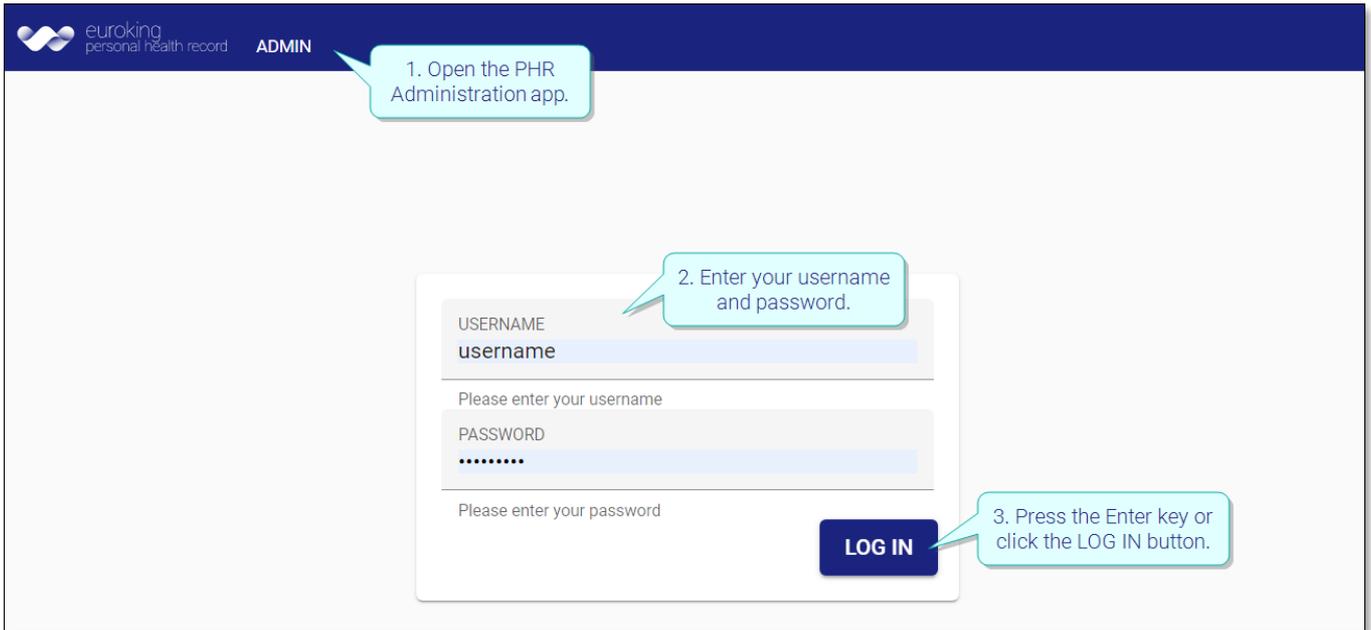
Supported Devices: Android, iPhone, iPad.

See also [Wellbeing Warranted Environment Specification](#)

## Log in

### Admin

1. Open PHR Administration, either via a browser or desktop icon .
2. Enter your username and password (the same as your EuroKing account).
3. Press the **[Enter]** key or click the **[LOG IN]** button.



The screenshot shows the 'ADMIN' login page of the 'euroking personal health record' app. The page has a dark blue header with the 'euroking' logo and 'ADMIN' text. The main content area is white and contains a login form with the following elements:

- Callout 1:** Points to the top of the page, stating '1. Open the PHR Administration app.'
- Callout 2:** Points to the 'USERNAME' field, stating '2. Enter your username and password.'
- Callout 3:** Points to the 'LOG IN' button, stating '3. Press the Enter key or click the LOG IN button.'

The login form includes:

- A 'USERNAME' field with the text 'username' entered.
- A 'PASSWORD' field with masked characters '.....'.
- A 'LOG IN' button.

### Patient

Patients can access PHR via a link which is emailed to them. See [EK\\_CRIB\\_AM\\_730\\_E3\\_PHR\\_Patient\\_Guide](#).

## Dashboard

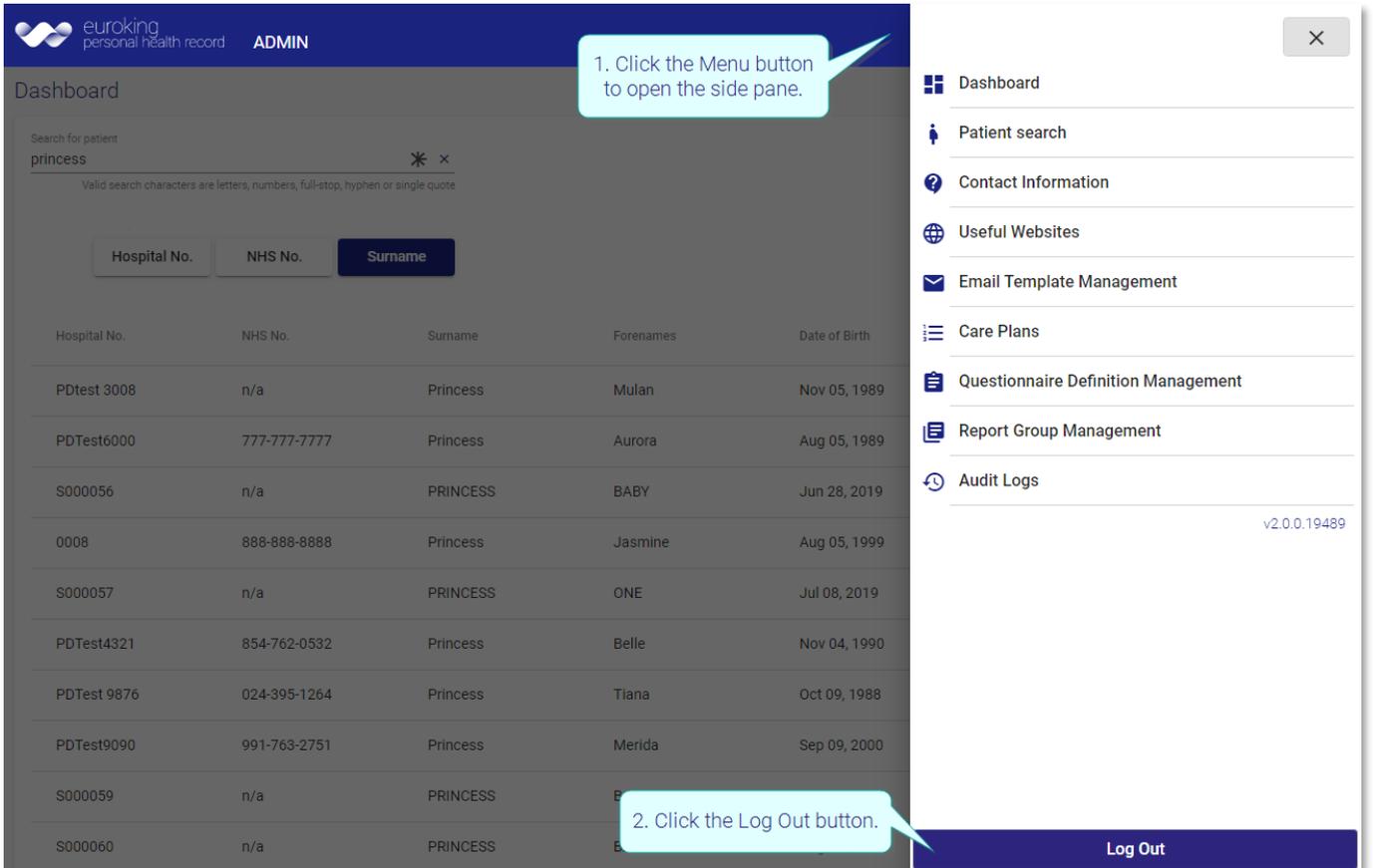
The home page **Dashboard** shows:

- Patient Search. You will only see patients who have an email address on the Demographics screen of EuroKing.
- Number of registered users - have given an email address, been authorised, and registered with the app.
- Number of active users - have signed in since registration.
- Number of inactive users - have registered but not signed in since then.

Click a card to view a list of the patients in the category.

Log out

1. Click the **[Menu]**  button to open the side pane.
2. Click the **[Log Out]** button.



The screenshot shows the 'ADMIN' interface of the 'euroking personal health record' system. The main content area displays a search for 'princess' with a table of results. A callout box points to the menu icon in the top right corner of the main area, with the text '1. Click the Menu button to open the side pane.' The side menu is open, showing various navigation options. A callout box points to the 'Log Out' button at the bottom of the side menu, with the text '2. Click the Log Out button.'

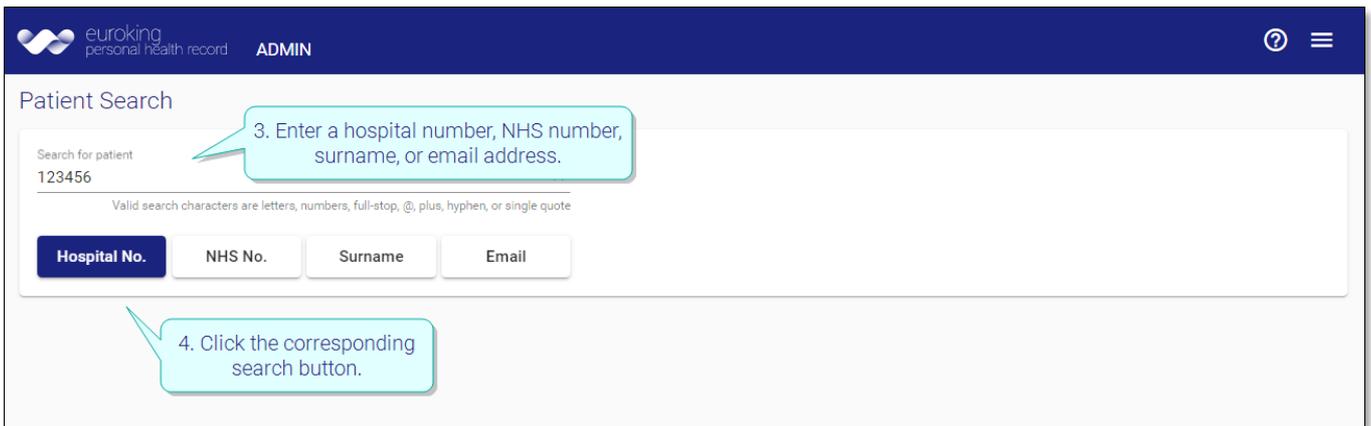
Hospital No.	NHS No.	Surname	Forenames	Date of Birth
PDtest 3008	n/a	Princess	Mulan	Nov 05, 1989
PDTest6000	777-777-7777	Princess	Aurora	Aug 05, 1989
S000056	n/a	PRINCESS	BABY	Jun 28, 2019
0008	888-888-8888	Princess	Jasmine	Aug 05, 1999
S000057	n/a	PRINCESS	ONE	Jul 08, 2019
PDTest4321	854-762-0532	Princess	Belle	Nov 04, 1990
PDTest 9876	024-395-1264	Princess	Tiana	Oct 09, 1988
PDTest9090	991-763-2751	Princess	Merida	Sep 09, 2000
S000059	n/a	PRINCESS		
S000060	n/a	PRINCESS		

**Note:**

You will be automatically logged out after 30 minutes of inactivity.

## Search for a patient

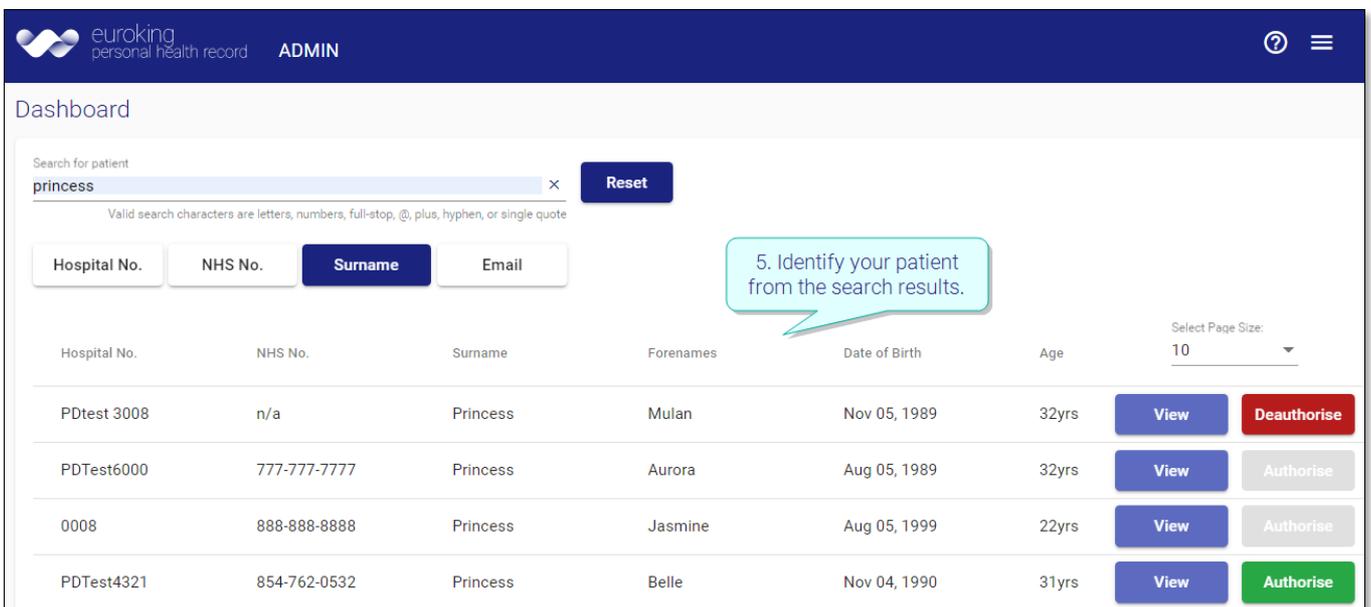
1. Click the **[Menu]**  button to open the side pane.
2. Click  **Patient Search**.
3. Enter a hospital number, NHS number, surname, or email address.
4. Click the corresponding search button. A list of matching patients is displayed.



**3. Enter a hospital number, NHS number, surname, or email address.**

**4. Click the corresponding search button.**

5. Identify your patient from the search results.



**5. Identify your patient from the search results.**

Hospital No.	NHS No.	Surname	Forenames	Date of Birth	Age	View	Deauthorise
PDtest 3008	n/a	Princess	Mulan	Nov 05, 1989	32yrs	<a href="#">View</a>	<a href="#">Deauthorise</a>
PDTest6000	777-777-7777	Princess	Aurora	Aug 05, 1989	32yrs	<a href="#">View</a>	<a href="#">Authorise</a>
0008	888-888-8888	Princess	Jasmine	Aug 05, 1999	22yrs	<a href="#">View</a>	<a href="#">Authorise</a>
PDTest4321	854-762-0532	Princess	Belle	Nov 04, 1990	31yrs	<a href="#">View</a>	<a href="#">Authorise</a>

**Tip:**

Hospital number	Hospital number is the preferred search term.
NHS number	NHS number is also recommended.
Surname	Exact match only. Enter the full surname.
Email	Exact match only. Enter the full email address.

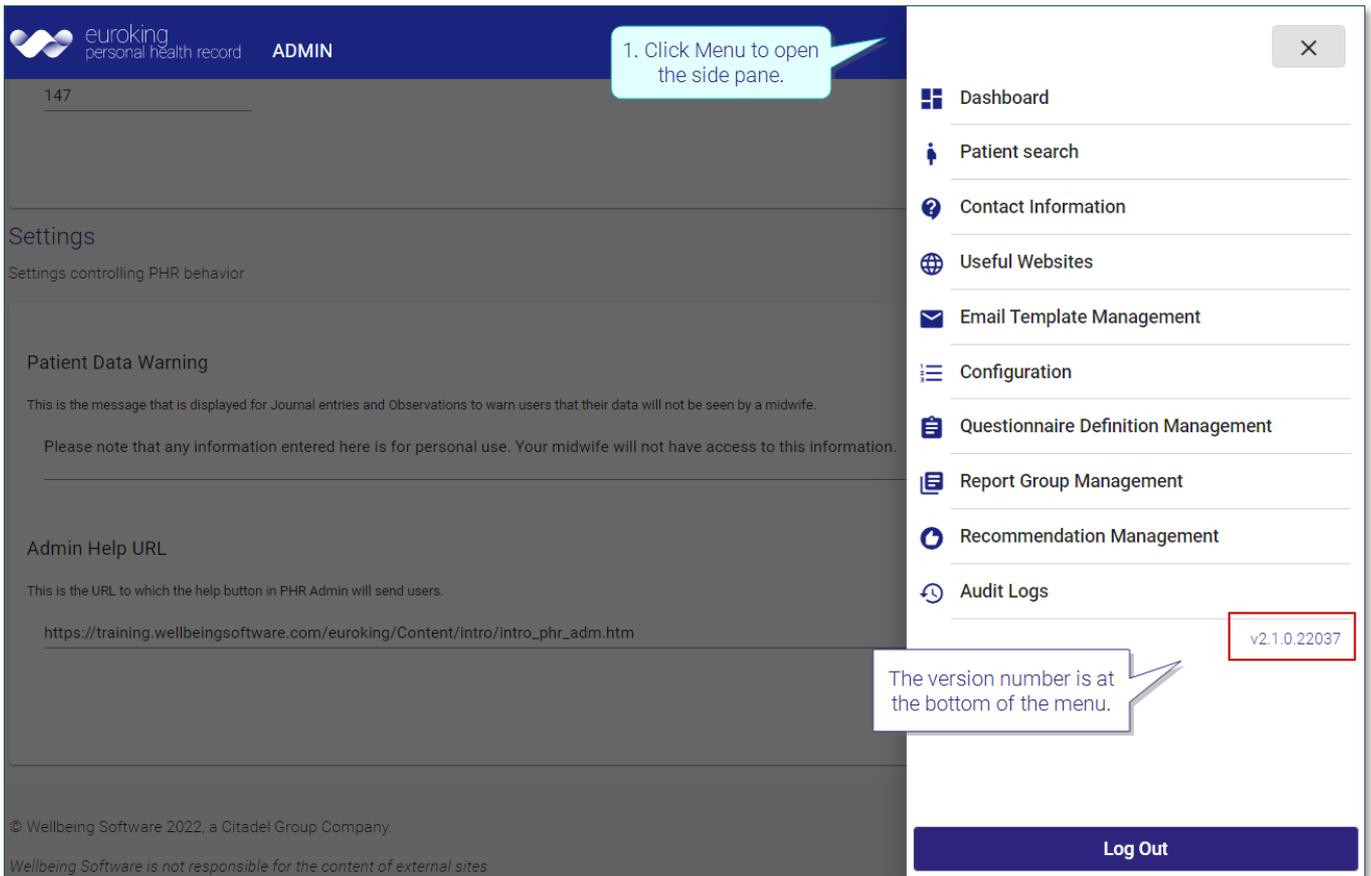
**Tip:**

Click a column header in search results to sort the table by that item.

## Find the application version number

You may need to supply a version number or application information (for Wellbeing Service).

Click the **[Menu]**  button to open the side pane. The version number is at the bottom of the menu.



The screenshot shows the 'ADMIN' interface of the Wellbeing Software. The top navigation bar includes the 'euroking personal health record' logo and the text 'ADMIN'. Below the navigation bar, there is a 'Settings' section with various options. A callout box points to the menu icon in the top right corner, stating: '1. Click Menu to open the side pane.' The side menu is open, displaying a list of options: Dashboard, Patient search, Contact Information, Useful Websites, Email Template Management, Configuration, Questionnaire Definition Management, Report Group Management, Recommendation Management, and Audit Logs. At the bottom of the side menu, the version number 'v2.1.0.22037' is displayed and highlighted with a red box. A callout box points to this version number, stating: 'The version number is at the bottom of the menu.' A 'Log Out' button is visible at the bottom of the side menu.

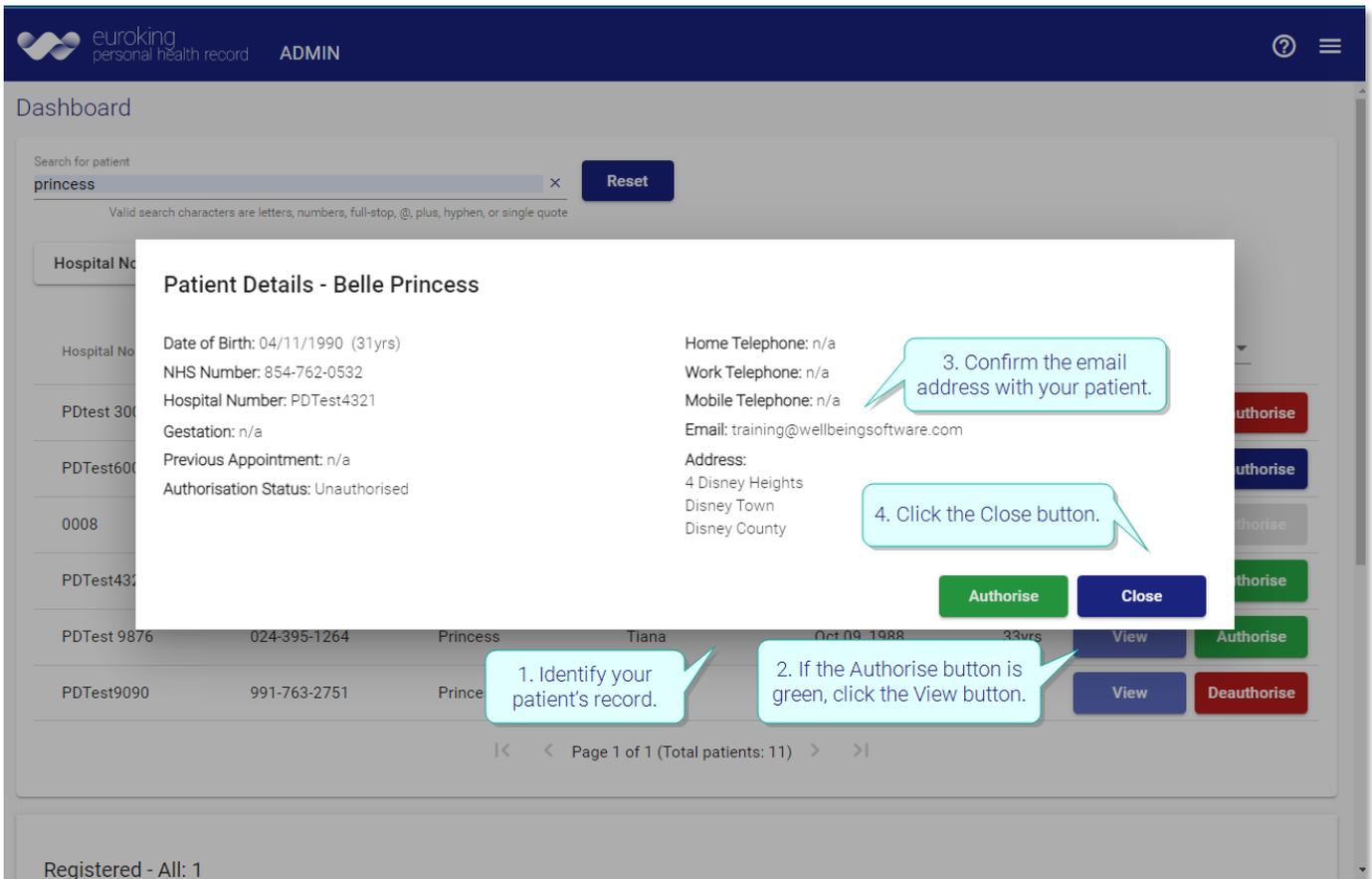
## Authorise Patient Access

### Find your patient

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Patient Search**.
3. Enter a hospital number, NHS number, surname, or email address.
4. Click the corresponding search button. A list of matching patients is displayed.

## Confirm email address

1. Identify your patient's record.
2. If the **[Authorise]** button is green, click the **[View]** button.
3. Confirm the email address with your patient.
4. Click the **[Close]** button.



The screenshot shows the EuroKing Admin interface. At the top, there is a search bar with the text "princess" and a "Reset" button. Below the search bar is a "Patient Details - Belle Princess" modal window. The modal contains the following information:

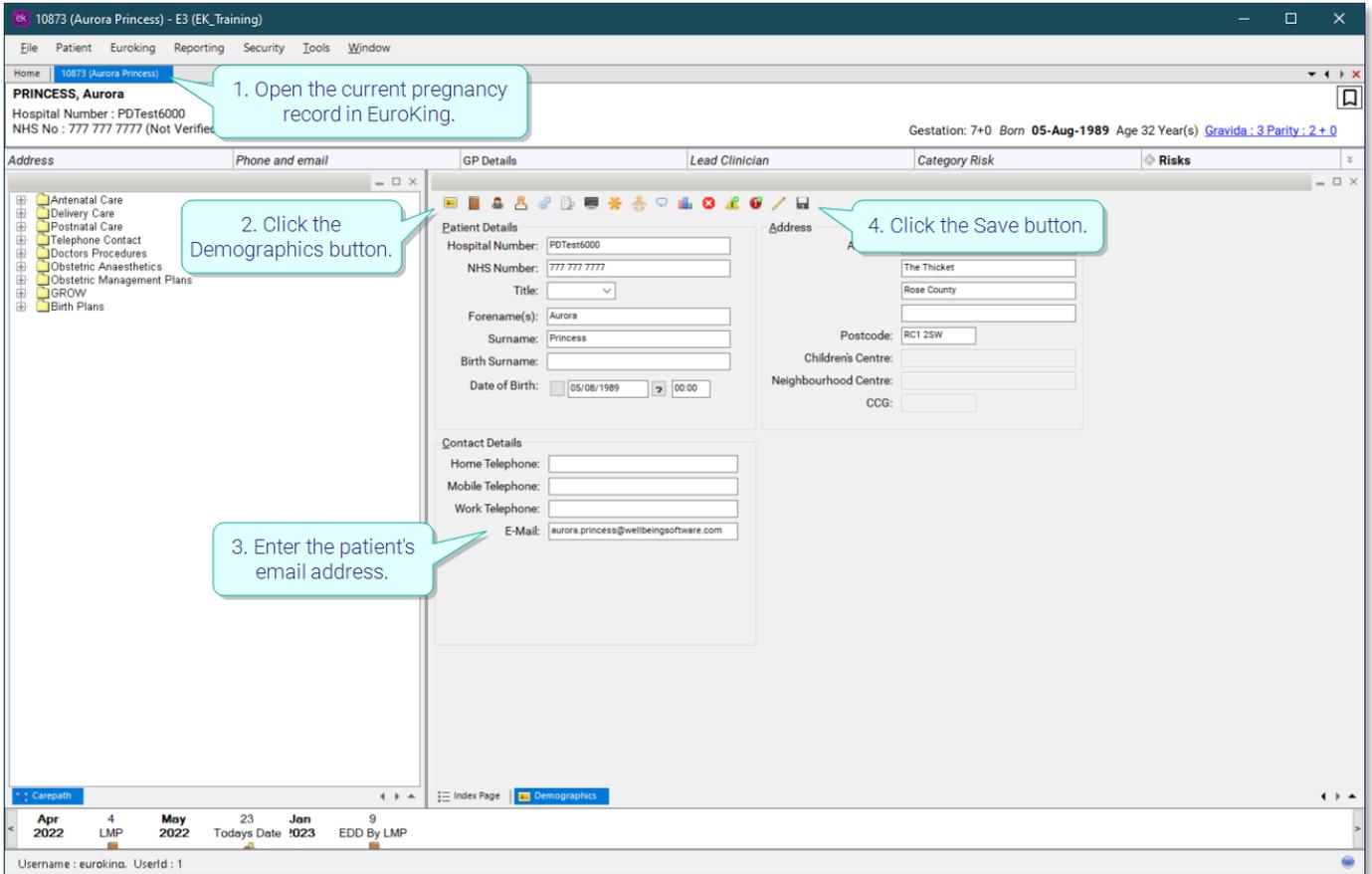
- Date of Birth: 04/11/1990 (31yrs)
- NHS Number: 854-762-0532
- Hospital Number: PDTest4321
- Gestation: n/a
- Previous Appointment: n/a
- Authorisation Status: Unauthorised
- Home Telephone: n/a
- Work Telephone: n/a
- Mobile Telephone: n/a
- Email: training@wellbeingsoftware.com
- Address: 4 Disney Heights, Disney Town, Disney County

At the bottom of the modal, there are two buttons: "Authorise" (green) and "Close" (blue). Below the modal, a patient list is visible with columns for Hospital No, Patient Name, Date of Birth, and Age. The list includes entries for "Princess Tiana" and "Princess Belle". Callouts are placed over the interface to guide the user through the steps: 1. Identify your patient's record (pointing to the patient list), 2. If the Authorise button is green, click the View button (pointing to a green Authorise button and a View button), 3. Confirm the email address with your patient (pointing to the email field), and 4. Click the Close button (pointing to a Close button).

Button	Description
	Click to view patient demographics, including email address.
	The patient's record does not contain an email address. You can add an email address via EuroKing (see below).
	The patient's record contains an email address. Click to grant access.
	The patient has been granted access to PHR. Click to revoke access.
	The patient's access was previously granted then revoked. They will be locked out of their account until you reauthorise.

## Add Patient Email Address via EuroKing

If you can't find your patient in PHR, or there is no email address, open the main EuroKing application. Before a patient can be authorised in PHR, there must be a valid email address in a current pregnancy record in EuroKing, on the **Demographics** screen. Entering an email address creates a record for the patient in PHR.



10873 (Aurora Princess) - E3 (EK\_Training)

File Patient Euroking Reporting Security Tools Window

Home | 10873 (Aurora Princess)

**PRINCESS, Aurora**  
Hospital Number : PDTest6000  
NHS No : 777 777 7777 (Not Verified)

Gestation: 7+0 Born **05-Aug-1989** Age 32 Year(s) [Gravida : 3 Parity : 2 + 0](#)

Address Phone and email GP Details Lead Clinician Category Risk Risks

Antenatal Care  
Delivery Care  
Postnatal Care  
Telephone Contact  
Doctors Procedures  
Obstetric Anaesthetics  
Obstetric Management Plans  
GROW  
Birth Plans

Patient Details  
Hospital Number: PDTest6000  
NHS Number: 777 777 7777  
Title:   
Forename(s): Aurora  
Surname: Princess  
Birth Surname:   
Date of Birth: 05/08/1989 00:00

Contact Details  
Home Telephone:   
Mobile Telephone:   
Work Telephone:   
E-Mail:

Address  
The Thicket  
Rose County  
Postcode: RC1 2SW  
Children's Centre:   
Neighbourhood Centre:   
CCG:

4. Click the Save button.

2. Click the Demographics button.

3. Enter the patient's email address.

1. Open the current pregnancy record in EuroKing.

Carepath

Apr 2022 4 LMP May 2022 23 Today's Date Jan 2023 9 EDD By LMP

Index Page Demographics

Username : eurokinga. Userid : 1

1. Open the current pregnancy record in EuroKing.
2. Click the **[Demographics]**  button.
3. Enter the email address.
4. Click the **[Save]**  button.

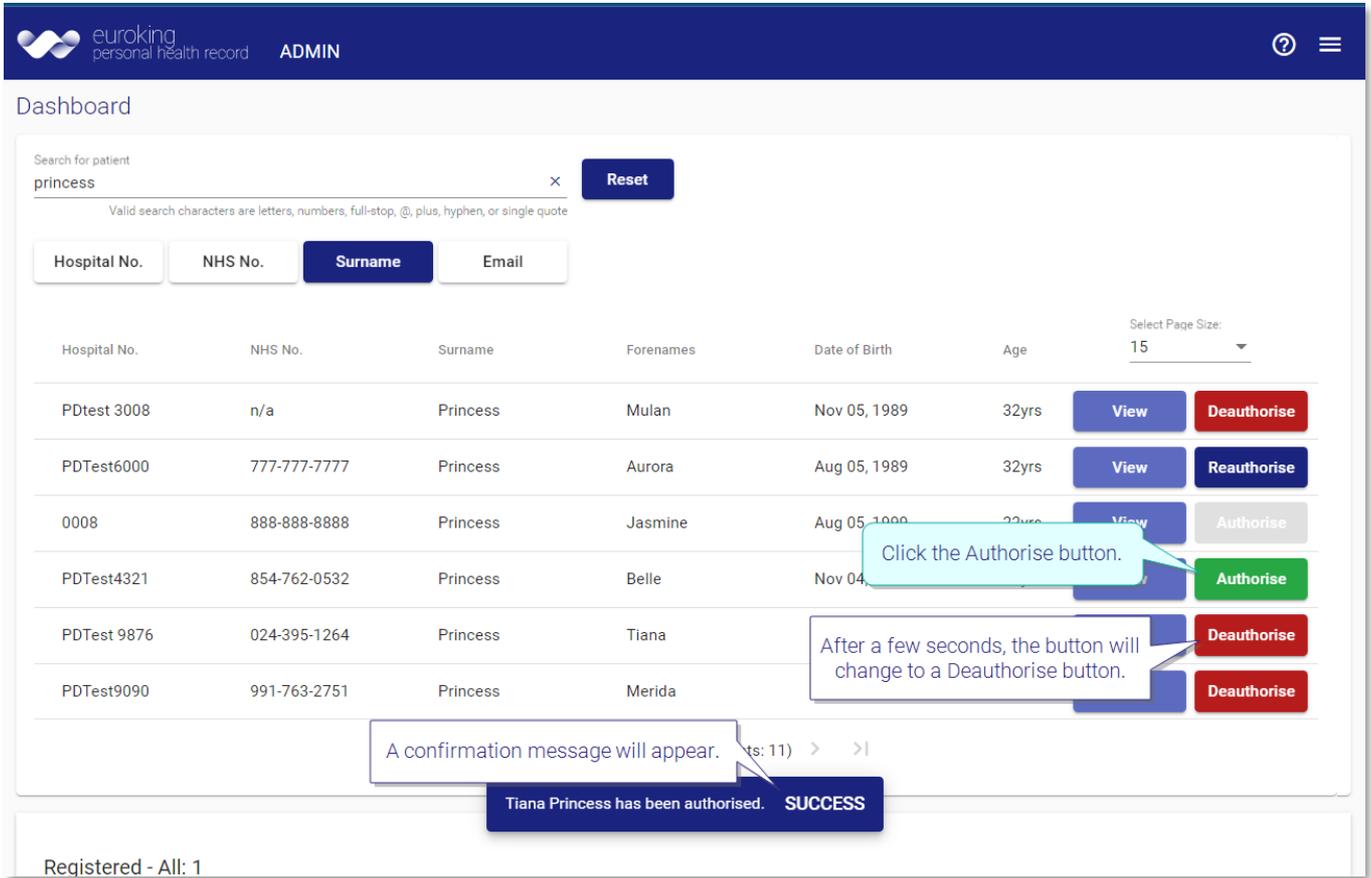
### Warning:

In most instances demographic information is directly populated from PAS (Patient Administration System) or HIS (Hospital Information System). Demographic changes made in EuroKing may be overwritten by PAS / HIS. Check whether this applies to the email address field in your system.

## Authorise

Click the **[Authorise]** button.

After a few seconds, the button will change to a [Deauthorise] button. A confirmation message will appear.



The screenshot shows the 'ADMIN' dashboard for Euroking Personal Health Record. A search bar contains 'princess' with a 'Reset' button. Below the search bar are filters for Hospital No., NHS No., Surname, and Email. A table lists patients with columns for Hospital No., NHS No., Surname, Forenames, Date of Birth, and Age. Each row has 'View' and 'Deauthorise' buttons. The 'Deauthorise' button for Tiana Princess is highlighted with a callout: 'Click the Authorise button.' Below it, another callout says: 'After a few seconds, the button will change to a Deauthorise button.' A confirmation message box at the bottom reads: 'Tiana Princess has been authorised. SUCCESS'. A status bar at the bottom indicates 'Registered - All: 1'.

Hospital No.	NHS No.	Surname	Forenames	Date of Birth	Age	View	Deauthorise
PDtest 3008	n/a	Princess	Mulan	Nov 05, 1989	32yrs	View	Deauthorise
PDTest6000	777-777-7777	Princess	Aurora	Aug 05, 1989	32yrs	View	Reauthorise
0008	888-888-8888	Princess	Jasmine	Aug 05, 1990	32yrs	View	Authorise
PDTest4321	854-762-0532	Princess	Belle	Nov 04, 1990	32yrs	View	Authorise
PDTest 9876	024-395-1264	Princess	Tiana	Nov 04, 1990	32yrs	View	Deauthorise
PDTest9090	991-763-2751	Princess	Merida	Nov 04, 1990	32yrs	View	Deauthorise

### Tip:

The patient will receive an email with a link to their PHR. The link is valid for 72 hours.

If a patient informs you that their link has expired, deauthorise then reauthorise. This will trigger a new email.

## Re-authorise

If the patient does not access PHR within 72 hours of the activation email, you will need to deauthorise then authorise their PHR account. Click the **[Deauthorise]** button then the **[Authorise]** button.

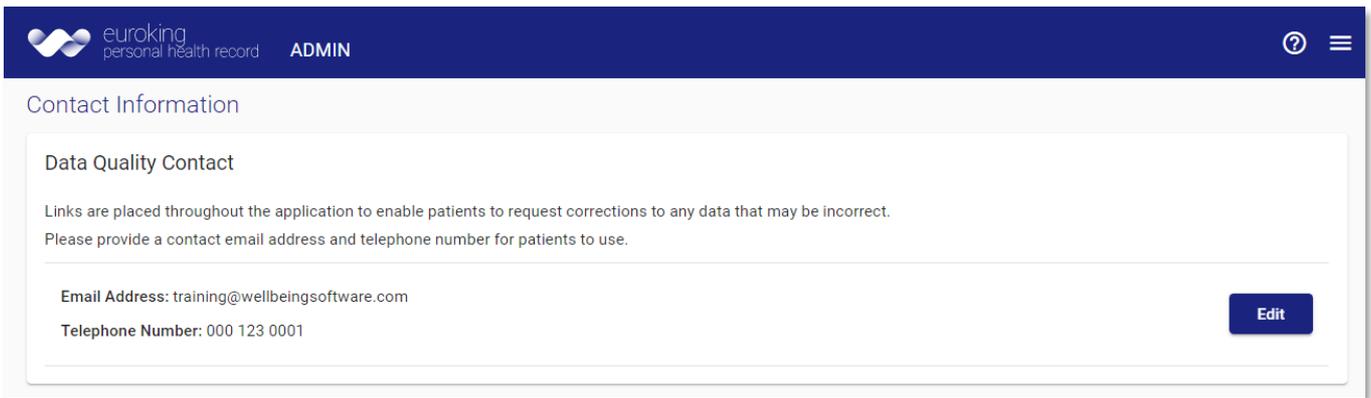
An email with a registration link will be sent to the patient. The link expires after 72 hours.

## Contact information

### Add a Data Quality contact

Links are placed throughout the application to enable patients to request corrections to any data that may be incorrect. Please provide a contact email address and telephone number for patients to use.

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Contact Information**.
3. Click the **[Edit]** button in the **Data Quality Contact** section.
4. Enter an email address and telephone number.
5. Click the **[Save]** button.



euoking  
personal health record ADMIN

### Contact Information

#### Data Quality Contact

Links are placed throughout the application to enable patients to request corrections to any data that may be incorrect.  
Please provide a contact email address and telephone number for patients to use.

Email Address: training@wellbeingsoftware.com

Telephone Number: 000 123 0001

Edit

### Add a useful address

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Contact Information**.
3. Click the **[Add Address]** button in the **Useful Addresses** section.
4. Enter a name and address.
5. Click the **[Save]** button.
6. Click the **[Add Address]** button to add another useful address.

**Useful Addresses**

Wellbeing Software  
Hamilton Court, Oakham Business Park, Mansfield, Nottinghamshire, NG18 5FB

Edit  
Delete

Add Address

**Note:**

Fields marked with an asterisk \* are mandatory.

### Add a department schedule

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Contact Information**.
3. Click the **[Add Department]** button in the Useful Addresses section.
4. Enter the department's name, telephone number, email address and website.
5. For each day, click either the **[Open 24 Hours]** tickbox or the **[Hours]** button.
6. Enter hours for each day the department is open.
7. Click the **[Save]** button.
8. Click the **[Add Department]** button to add another department.

**Department Schedules**

<p>Obstetric Ultrasound 000 123 1111 obstetricultrasound@wellbeingsoftware.com</p>	<p>Monday: 08:00 - 17:00 Tuesday: 08:00 - 17:00 Wednesday: 08:00 - 17:00 Thursday: 08:00 - 17:00</p>
--	--

Edit

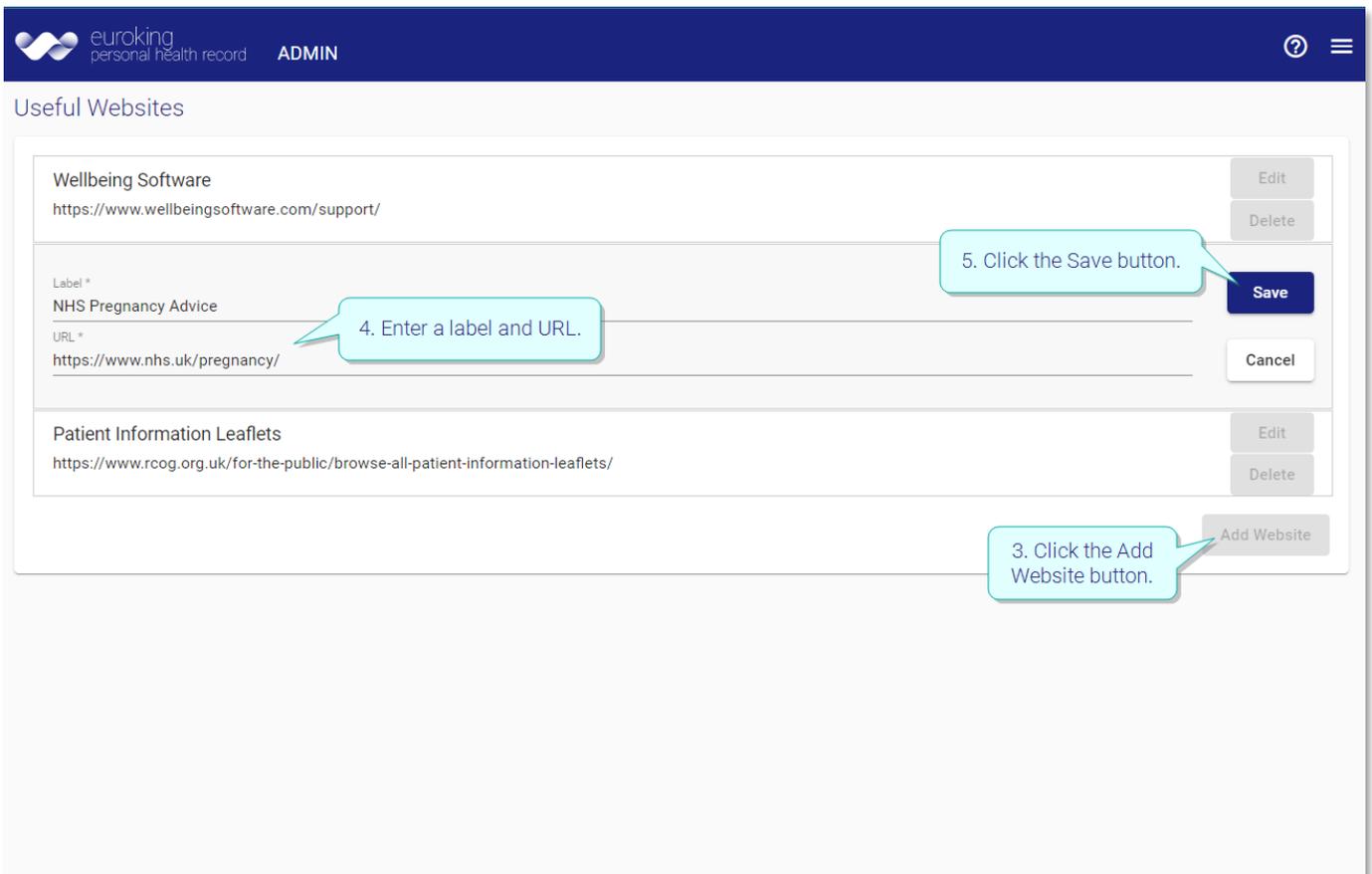
**Note:**

- The **[Save]** button will only appear once you have entered all the required information.
- Each department must have at least one set of opening hours per week.
- Each department's opening hours must not overlap each other.

## Useful websites

### Add a useful website

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Useful Websites**.
3. Click the **[Add Website]** button.
4. Enter a label and URL.
5. Click the **[Save]** button.



The screenshot shows the 'Useful Websites' admin page. At the top, there's a header with the 'euroking personal health record' logo and 'ADMIN' text. Below the header, the page title is 'Useful Websites'. The main content area contains a table of existing websites and a form to add a new one. The table lists 'Wellbeing Software' and 'Patient Information Leaflets'. The form has fields for 'Label \*' and 'URL \*', and buttons for 'Save', 'Cancel', 'Edit', and 'Delete'. Callouts point to the 'Add Website' button, the form fields, and the 'Save' button.

Label	URL	Actions
Wellbeing Software	<a href="https://www.wellbeingsoftware.com/support/">https://www.wellbeingsoftware.com/support/</a>	Edit, Delete
NHS Pregnancy Advice	<a href="https://www.nhs.uk/pregnancy/">https://www.nhs.uk/pregnancy/</a>	
Patient Information Leaflets	<a href="https://www.rcog.org.uk/for-the-public/browse-all-patient-information-leaflets/">https://www.rcog.org.uk/for-the-public/browse-all-patient-information-leaflets/</a>	Edit, Delete

Form fields:

Label \*  
NHS Pregnancy Advice

URL \*  
<https://www.nhs.uk/pregnancy/>

Buttons: Save, Cancel, Add Website

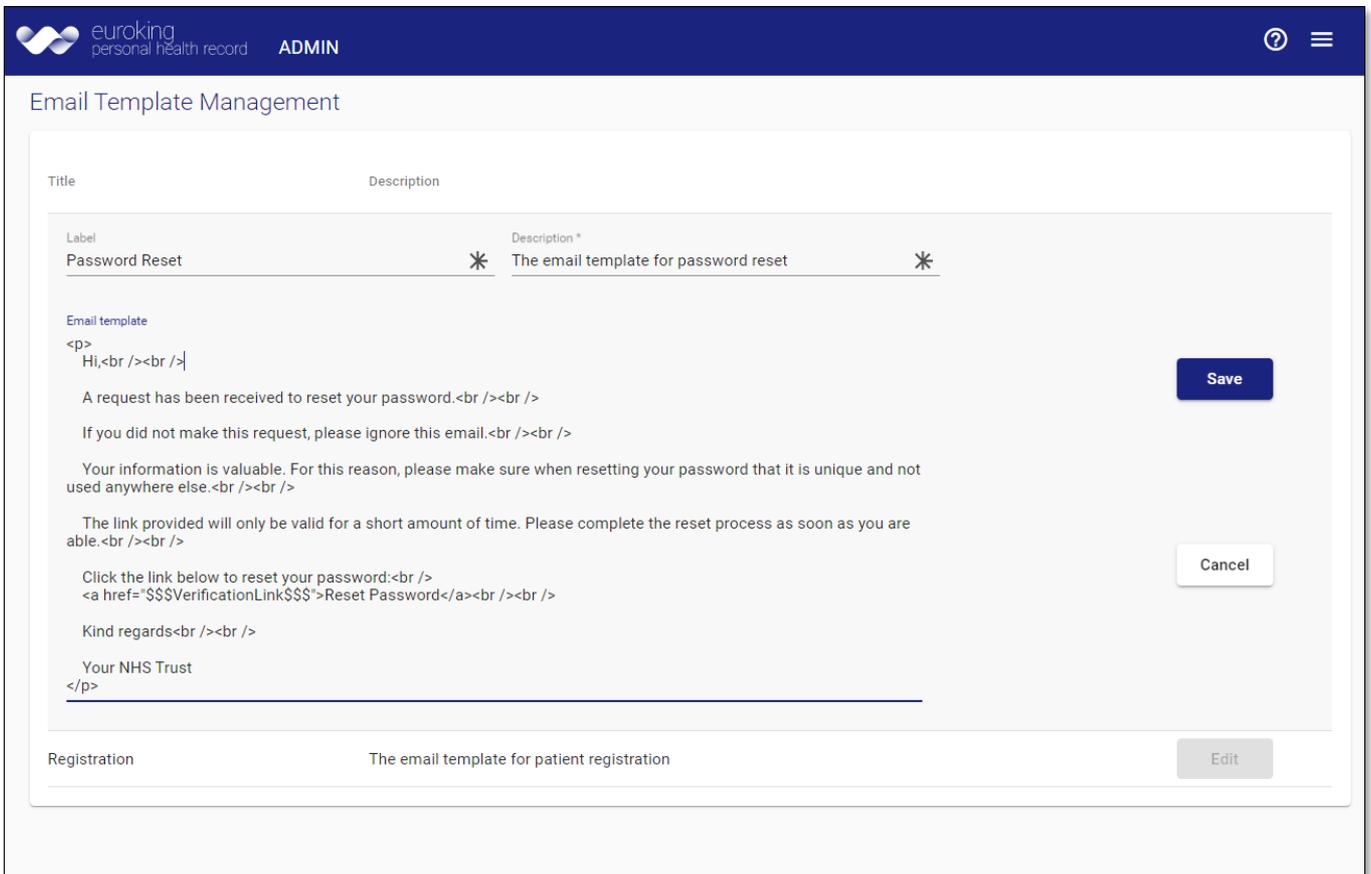
## Email template management

### Edit an email template

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Email Template Management**.
3. Click the **[Edit]** button.
4. Edit text as required.
5. Click the **[Save]** button to save details.  
OR
6. Click the **[Cancel]** button to close without saving.

#### Tip:

You can use HTML to format your email. `<br>` adds a line break. It does not require a closing tag. `<a href= URL>` adds a hyperlink to URL. The closing tag is `</a>`. Insert the text you want to display for the link between the tags, as in this example:  
`<a href=https://www.wellbeingsoftware.com>Wellbeing Software website</a>`

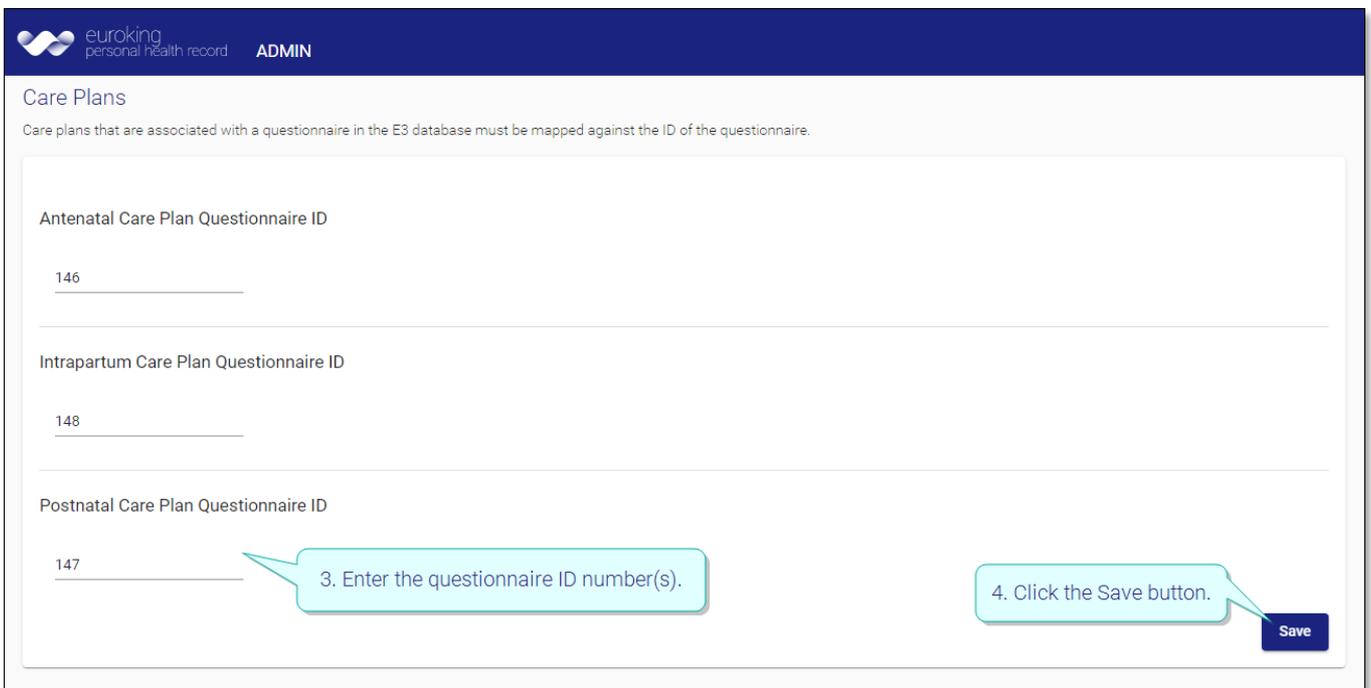


The screenshot shows the 'Email Template Management' interface. At the top, there is a header with the 'euoking personal health record' logo and 'ADMIN' text. The main content area is titled 'Email Template Management' and contains a table with two columns: 'Title' and 'Description'. The first row shows a template with the label 'Password Reset' and the description 'The email template for password reset'. Below this, the email template content is displayed in a text area, including a greeting, a request for password reset, a note about ignoring the email if not requested, a security warning, a link to reset the password, and a sign-off from NHS Trust. To the right of the text area are 'Save' and 'Cancel' buttons. Below the text area, there is another row in the table for 'Registration' with the description 'The email template for patient registration' and an 'Edit' button.

## Configuration

### Care plans

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Configuration**.
3. Enter the Care Plan ID numbers.
4. Click the **[Save]** button.



**euroking**  
personal health record **ADMIN**

### Care Plans

Care plans that are associated with a questionnaire in the E3 database must be mapped against the ID of the questionnaire.

Antenatal Care Plan Questionnaire ID  
146

Intrapartum Care Plan Questionnaire ID  
148

Postnatal Care Plan Questionnaire ID  
147

3. Enter the questionnaire ID number(s).

4. Click the Save button.

**Save**

#### Tip:

You will find questionnaire ID numbers in EuroKing via Tools > Questionnaire Setup.

### Patient data warning

This is the message that is displayed for Journal entries and Observations to warn patients that any data entered here will not be seen by a midwife.

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Configuration**.
3. Enter a message. For example, "Please note that any information entered here is for personal use. Your midwife will not have access to this information".

- Click the **[Save]** button.

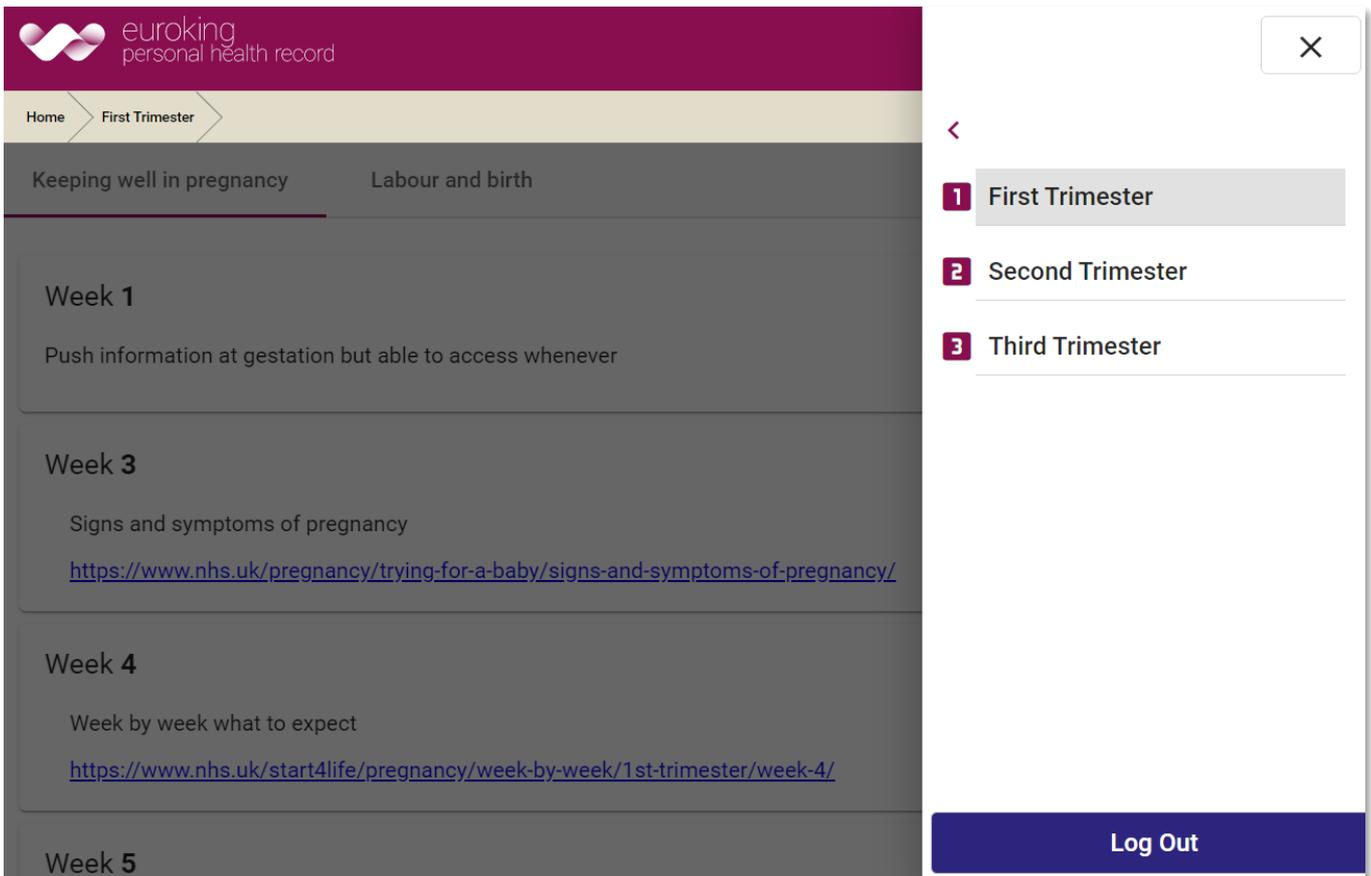
## Help URL

This is the URL to which the Help button in PHR Admin will send users.

- Click the **[Menu]**  button to open the side pane.
- Click  **Configuration**.
- Enter a URL, for example <https://training.wellbeingsoftware.com/euroking/>
- Click the **[Save]** button.

## Trimester-specific information

- The PHR patient app has a **Pregnancy Information** page for each trimester containing links to useful information from the NHS.
- The links are agreed and configured before deployment.
- Links are displayed which are relevant to the current trimester.
  - 1 If gestation is between 0 and 12 weeks, the First Trimester page opens.
  - 2 If gestation is between 13 and 27 weeks, the Second Trimester page opens.
  - 3 If gestation is 28 and above, the Third Trimester page opens.
- Links are displayed in categories. For example, **Keeping Well in Pregnancy** and **Labour and Birth**.



The screenshot displays the 'euroking personal health record' app interface. At the top, there is a header with the euroking logo and the text 'euroking personal health record'. Below the header is a navigation bar with 'Home' and 'First Trimester' options. The main content area is divided into two sections: 'Keeping well in pregnancy' and 'Labour and birth'. Under 'Keeping well in pregnancy', there are four sub-sections: 'Week 1' (Push information at gestation but able to access whenever), 'Week 3' (Signs and symptoms of pregnancy, with a link to <https://www.nhs.uk/pregnancy/trying-for-a-baby/signs-and-symptoms-of-pregnancy/>), 'Week 4' (Week by week what to expect, with a link to <https://www.nhs.uk/start4life/pregnancy/week-by-week/1st-trimester/week-4/>), and 'Week 5'. On the right side, there is a sidebar menu with a close button (X) at the top right. The sidebar menu has a back arrow (<) and three items: '1 First Trimester' (selected), '2 Second Trimester', and '3 Third Trimester'. At the bottom of the sidebar, there is a 'Log Out' button.

- Upon clicking a link, a message will pop up to warn the patient that they are going to an external website.

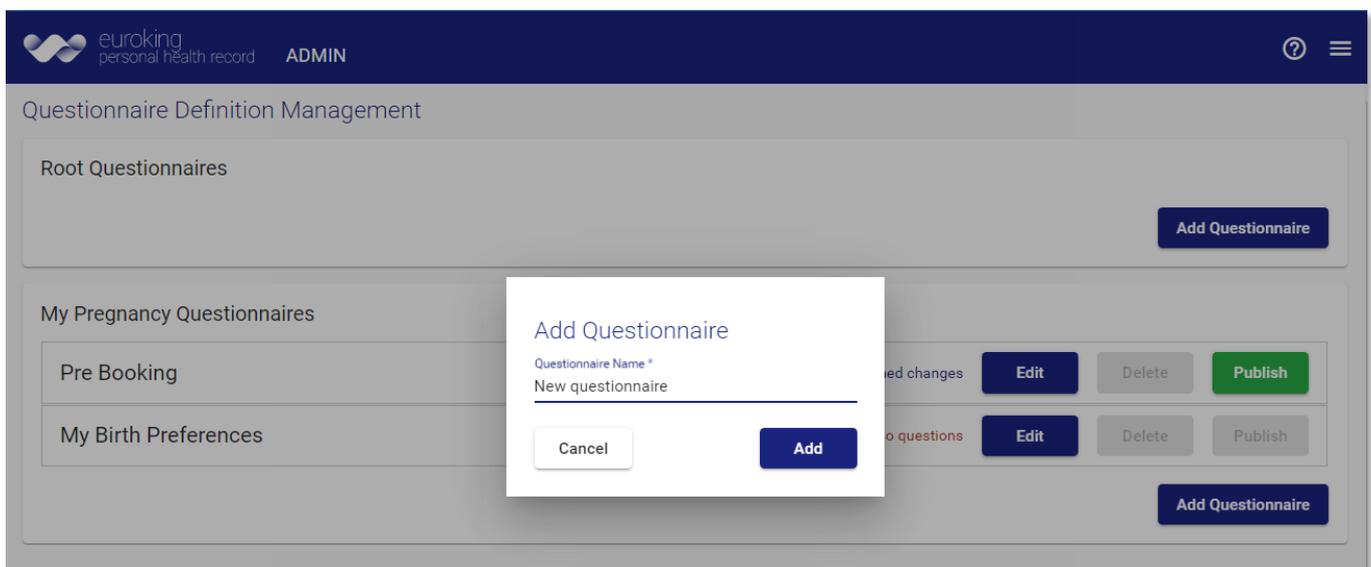
## Questionnaire Definition Management

You can define how existing questionnaires (Care Pathways) appear in PHR, and make new questionnaires.

- Select questions for the Pre Booking screen in the patient app, using questions from Medical History; Current Pregnancy; Screening; and any pregnancy-level questions from other E3 questionnaires.
- Create questionnaire sections (which the patient can expand / collapse to make it easier to enter data).
- Arrange the order of questions within a section.
- Edit the wording and Help text of any question.

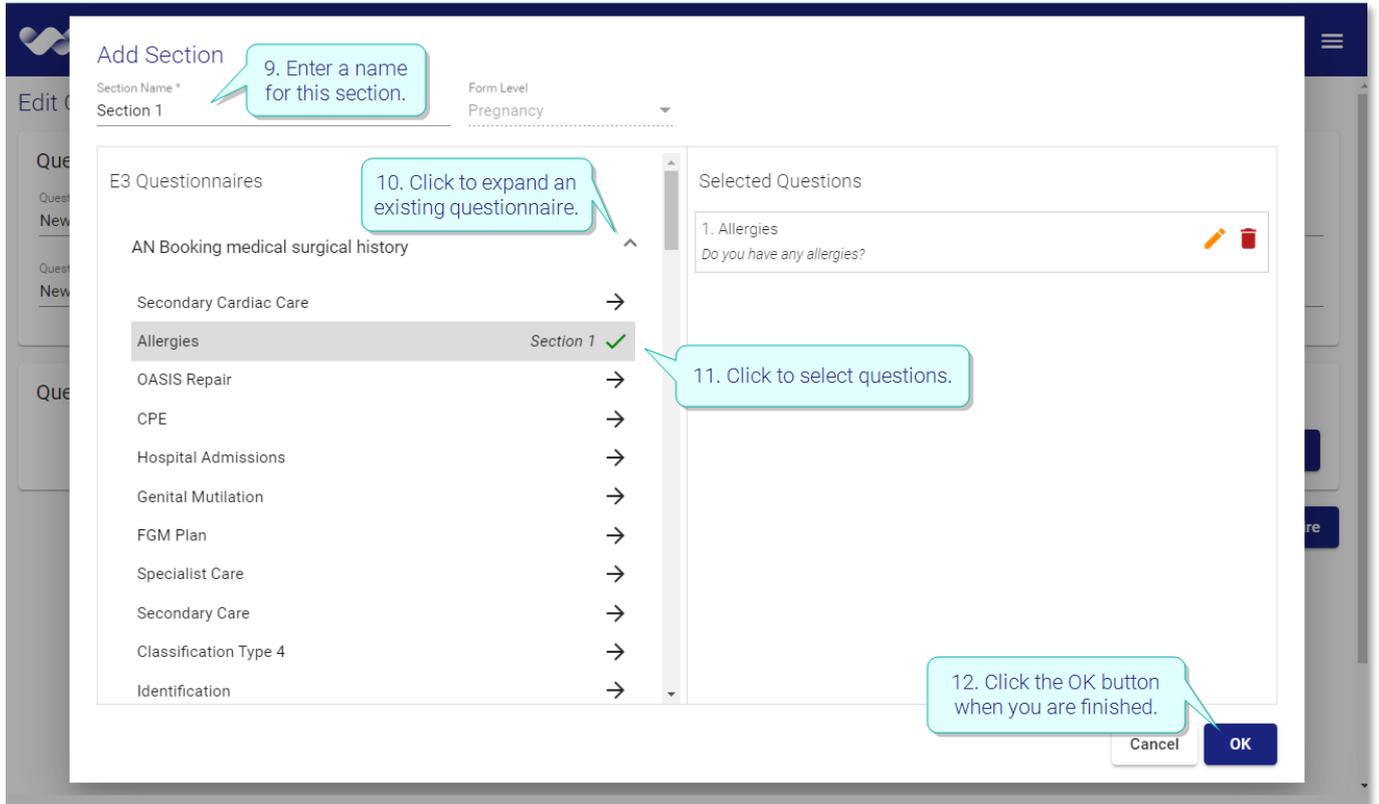
### Add a questionnaire

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Questionnaire Definition Management**.
3. Click the **[Add Questionnaire]** button.
4. Enter a name.
5. Click the **[Add]** button.  
The questionnaire is saved.



6. Click the **[Edit]** button next to the new questionnaire.
7. Enter a description.
8. Click the **[Add Section]** button to add a set of questions.
9. Enter a name for this section.
10. Click to expand an existing questionnaire in the **E3** panel on the left.

11. Click a question to add it to the **Selected Questions** panel on the right.
12. Click the **[OK]** button when you are finished.
13. Click the **[Save Questionnaire]** button when you have added all the required sections.
14. Click the **[Publish]** button to publish this questionnaire in the patient app.



**Add Section**

Section Name \*  
Section 1

Form Level  
Pregnancy

E3 Questionnaires

- AN Booking medical surgical history
- Secondary Cardiac Care
- Allergies** Section 1 ✓
- OASIS Repair
- CPE
- Hospital Admissions
- Genital Mutilation
- FGM Plan
- Specialist Care
- Secondary Care
- Classification Type 4
- Identification

Selected Questions

1. Allergies  
Do you have any allergies?

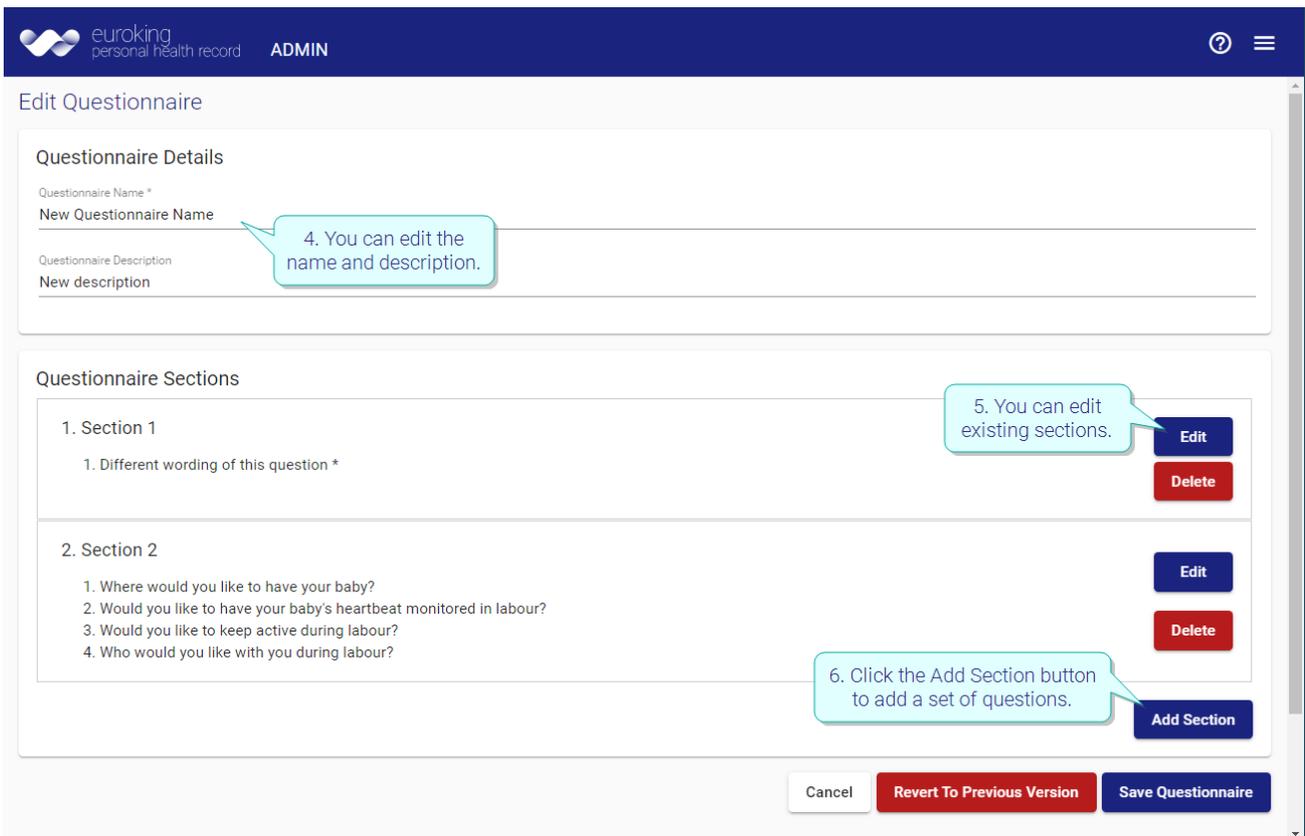
Cancel OK

**Note:**

New questionnaires, reports, recommendations, or changes will not appear in PHR Patient until you publish them.

## Edit a questionnaire

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Questionnaire Definition Management**.
3. Click the **[Edit]** button next to the questionnaire.
4. You can edit the name and description.
5. You can edit existing sections.
6. Click the **[Add Section]** button to add a set of questions.
7. Enter a name for this section.
8. Click to expand an existing questionnaire in the **E3** panel on the left..
9. Click a question to add it to the **Selected Questions** panel on the right.
10. Click the **[OK]** button when you have added all the required questions.
15. Click the **[Save Questionnaire]** button when you have added / edited all the required sections.
16. Click the **[Publish]** button to update this questionnaire in the patient app.

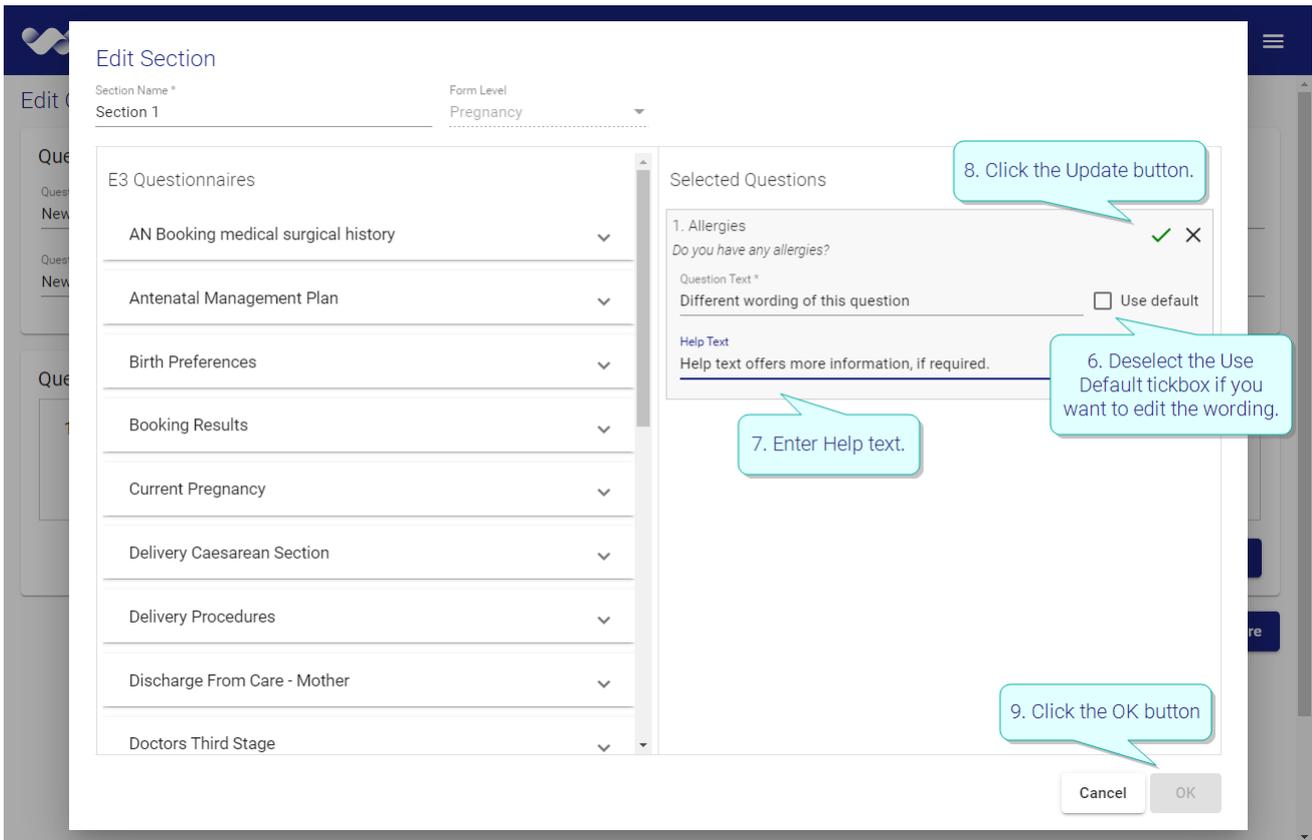


### Note:

New questionnaires, reports, recommendations, or changes will not appear in PHR Patient until you publish them.

## Edit a question

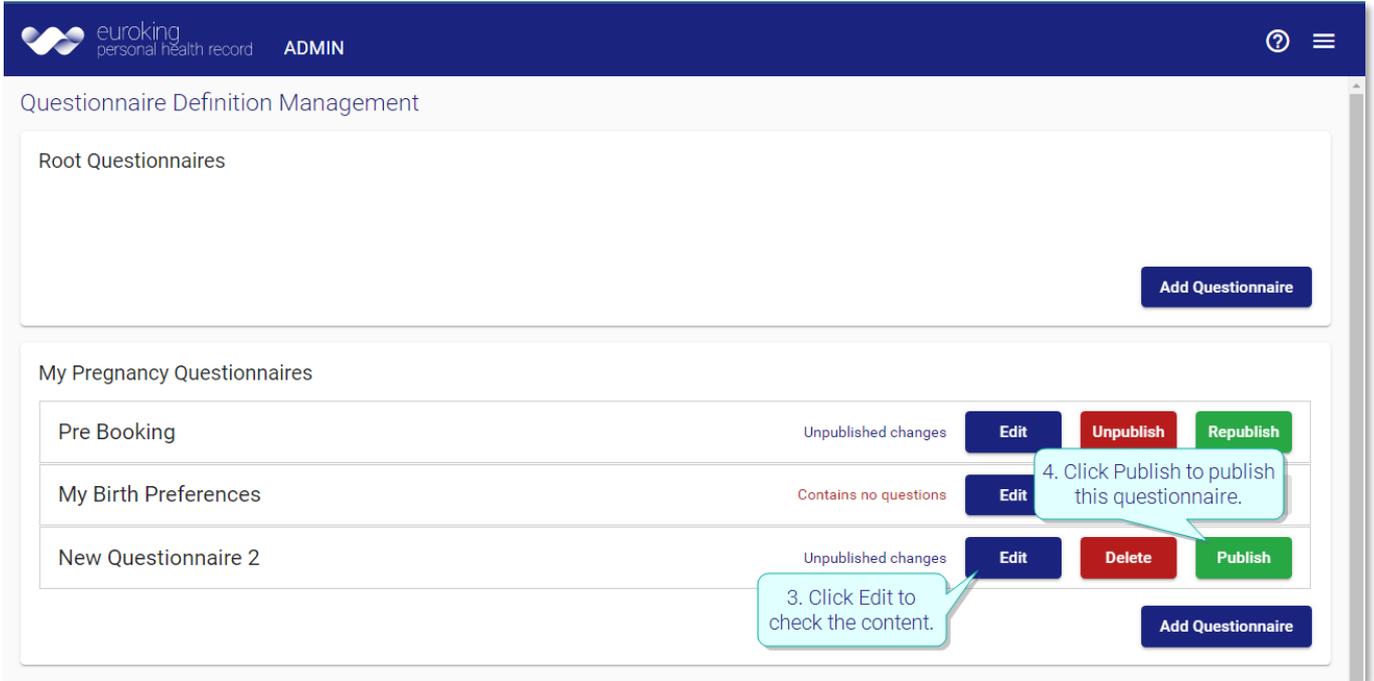
1. Click the **[Menu]**  button to open the side pane.
2. Click **[Questionnaire Definition Management]**.
3. Click the **[Edit]** button next to the questionnaire.
4. Click the **[Edit]** button next to the section.
5. Click the **[Edit]** button  next to the question.
6. Deselect the **[Use Default]** tickbox if you want to edit the wording of the question.
7. Enter Help text if you want to give the patient an explanation of this question.
8. Click the **[Update]**  button.
9. Click the **[OK]** button to save this section.
10. Click the **[Save Questionnaire]** button.
11. Click the **[Publish]** button to update this questionnaire in the patient app.



**Note:** This question remains linked to the original question in E3, you are only changing the wording which is displayed in the patient app.

## Publish a questionnaire

1. Click the **[Menu]**  button to open the side pane.
2. Click **[Questionnaire Definition Management]**.
3. Click the **[Edit]** button to check the content.
4. Click the **[Publish]** button to publish this questionnaire.



The screenshot shows the 'Questionnaire Definition Management' interface. At the top, there is a header with the 'euroking personal health record' logo and 'ADMIN' text. Below the header, the main content area is titled 'Questionnaire Definition Management'. It is divided into two sections: 'Root Questionnaires' and 'My Pregnancy Questionnaires'. The 'Root Questionnaires' section is currently empty, with an 'Add Questionnaire' button at the bottom right. The 'My Pregnancy Questionnaires' section contains a table with three rows:

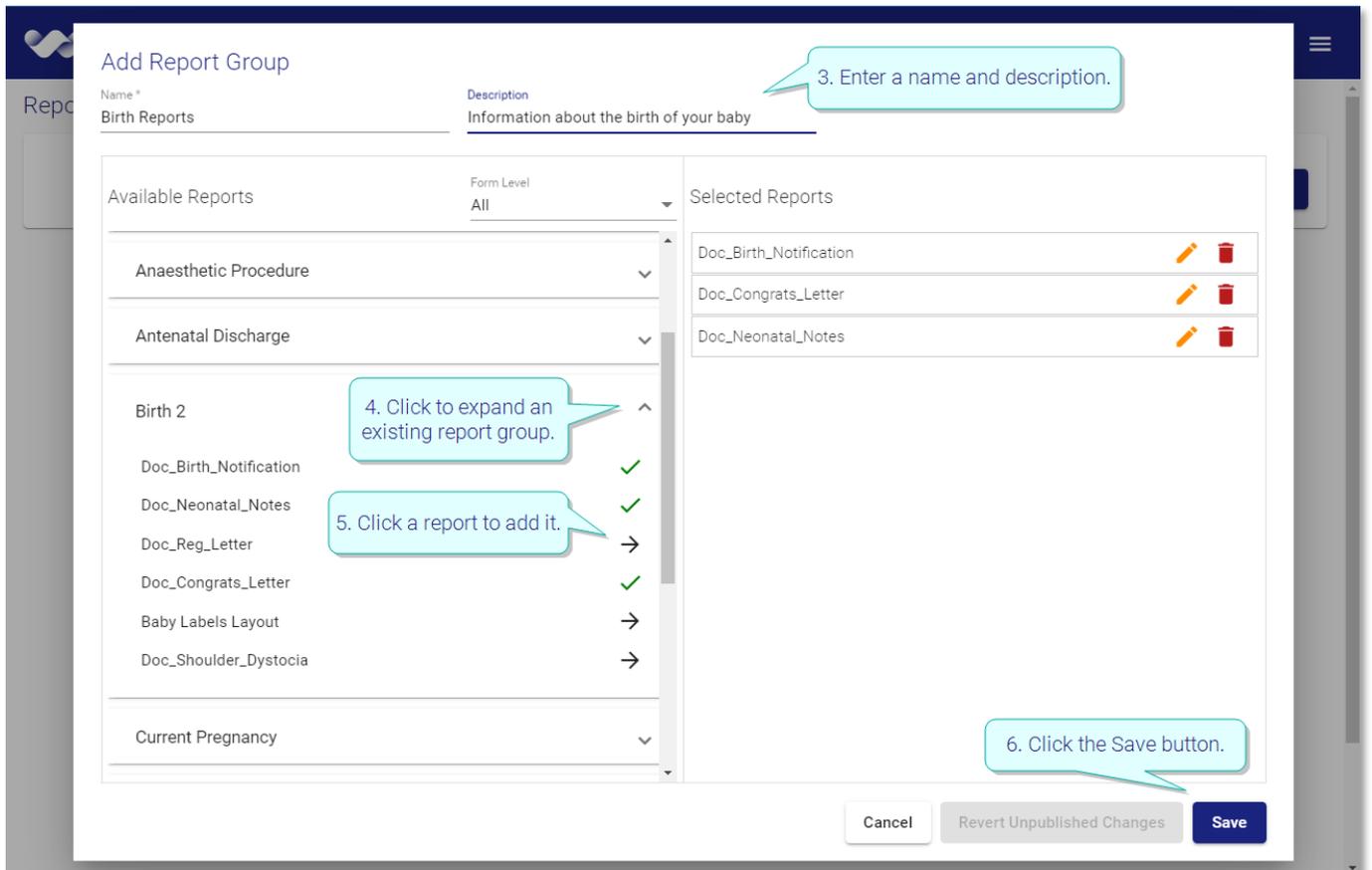
Questionnaire Name	Status	Actions
Pre Booking	Unpublished changes	Edit, Unpublish, Republish
My Birth Preferences	Contains no questions	Edit
New Questionnaire 2	Unpublished changes	Edit, Delete, Publish

Callout boxes provide instructions: '3. Click Edit to check the content.' points to the 'Edit' button for 'New Questionnaire 2', and '4. Click Publish to publish this questionnaire.' points to the 'Publish' button for 'Pre Booking'. An 'Add Questionnaire' button is also present at the bottom right of the 'My Pregnancy Questionnaires' section.

## Report Group Management

### Add a report group

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Report Group Management**.
3. Enter a name and description.
4. Click to expand an existing report group in the **Available Reports** panel on the left.
5. Click a report to add it to the **Selected Reports** panel on the right.
6. Click the **[Save]** button when you are finished.
7. Click the **[Publish]** button to publish these reports in the patient app.



The screenshot shows the 'Add Report Group' interface. The 'Name' field contains 'Birth Reports' and the 'Description' field contains 'Information about the birth of your baby'. The 'Available Reports' panel on the left is expanded to the 'Birth 2' group, showing a list of reports. The 'Selected Reports' panel on the right contains three reports: 'Doc\_Birth\_Notification', 'Doc\_Congrats\_Letter', and 'Doc\_Neonatal\_Notes'. At the bottom, there are 'Cancel', 'Revert Unpublished Changes', and 'Save' buttons.

**3. Enter a name and description.**

**4. Click to expand an existing report group.**

**5. Click a report to add it.**

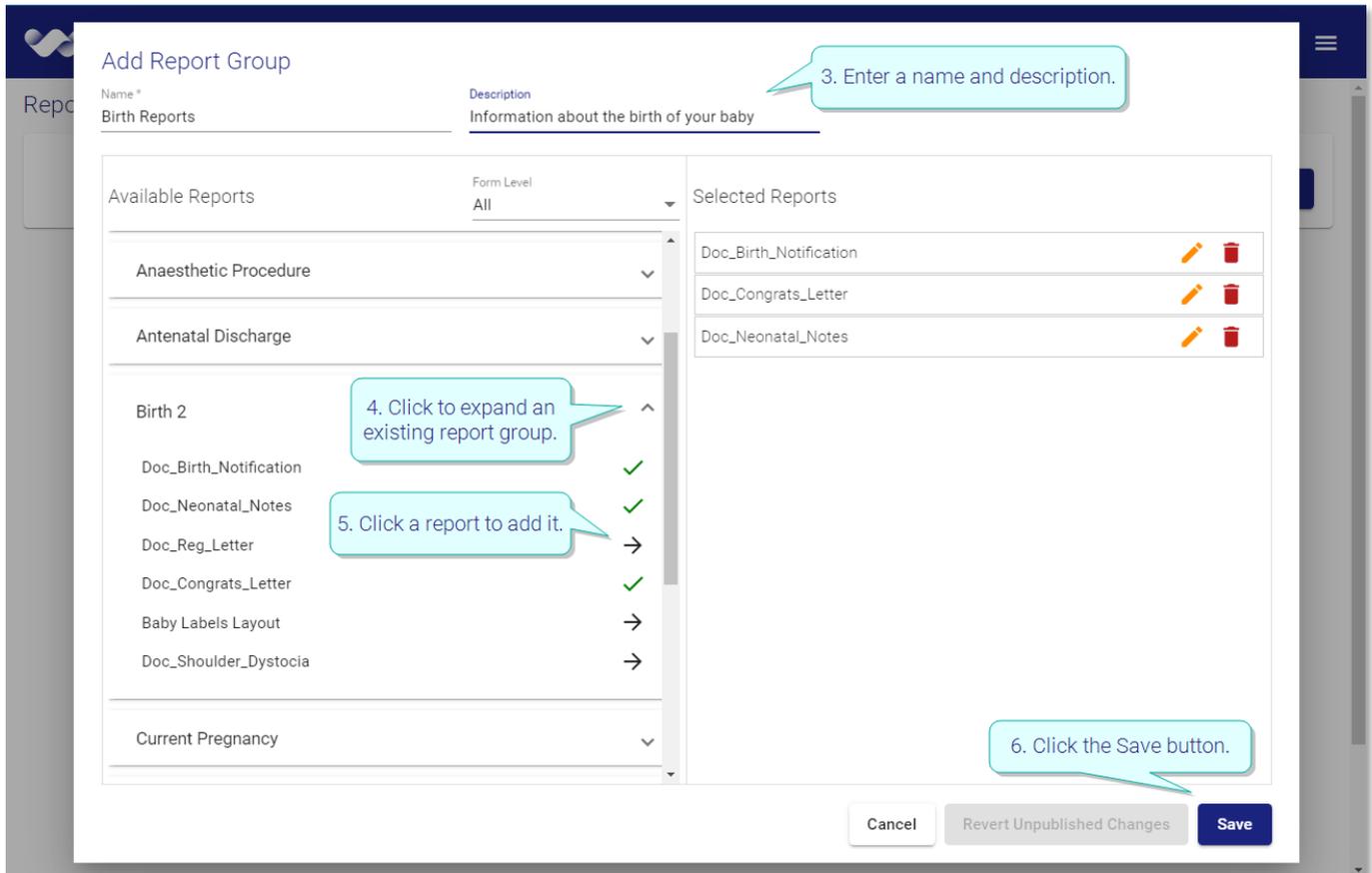
**6. Click the Save button.**

#### Note:

New questionnaires, reports, recommendations, or changes will not appear in PHR Patient until you publish them.

## Edit a report group

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Report Group Management**.
3. Click the **[Edit]** button next to the report group.
4. You can edit the name and description.
5. Click to expand an existing report group in the **Available Reports** panel on the left.
6. Click a report to add it to the **Selected Reports** panel on the right.
7. Click the **[Delete]** button to remove a report from this group.
8. Click the **[Save]** button when you are finished.
9. Click the **[Publish]** button to update this report group in the patient app.



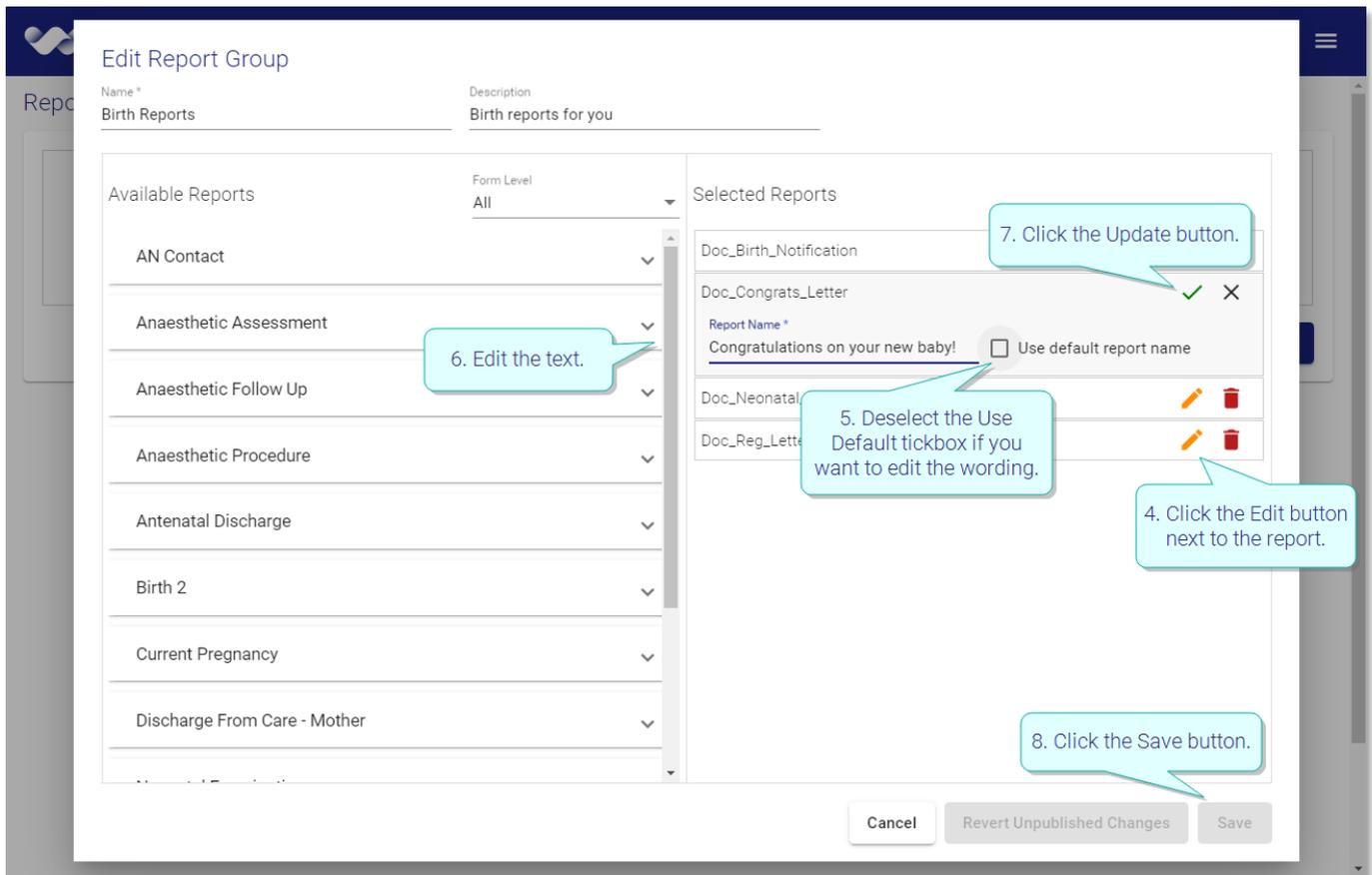
The screenshot shows the 'Add Report Group' interface. At the top, there are fields for 'Name' (containing 'Birth Reports') and 'Description' (containing 'Information about the birth of your baby'). A callout points to these fields with the text '3. Enter a name and description.' Below these fields are two panels: 'Available Reports' on the left and 'Selected Reports' on the right. The 'Available Reports' panel has a 'Form Level' dropdown set to 'All'. It lists several report groups, including 'Birth 2' which is expanded. A callout points to the 'Birth 2' group with the text '4. Click to expand an existing report group.' Below 'Birth 2', several individual reports are listed with status indicators: 'Doc\_Birth\_Notification' (checkmark), 'Doc\_Neonatal\_Notes' (checkmark), 'Doc\_Reg\_Letter' (arrow), 'Doc\_Congrats\_Letter' (checkmark), 'Baby Labels Layout' (arrow), and 'Doc\_Shoulder\_Dystocia' (arrow). A callout points to 'Doc\_Reg\_Letter' with the text '5. Click a report to add it.' The 'Selected Reports' panel shows three reports: 'Doc\_Birth\_Notification', 'Doc\_Congrats\_Letter', and 'Doc\_Neonatal\_Notes', each with edit and delete icons. A callout points to the 'Save' button at the bottom right with the text '6. Click the Save button.' At the bottom of the interface are three buttons: 'Cancel', 'Revert Unpublished Changes', and 'Save'.

### Note:

New questionnaires, reports, recommendations, or changes will not appear in PHR Patient until you publish them.

## Edit a report title

1. Click the **[Menu]**  button to open the side pane.
2. Click **[Report Group Management]** .
3. Click the **[Edit]** button next to the report group.
4. Click the **[Edit]** button  next to the report.
5. Deselect the **[Use Default]**  tickbox.
6. Edit the text in the **'Report Name'** field.
7. Click the **[Update]**  button.
8. Click the **[Save]** button.
9. Click the **[Publish]** button to update this report in the patient app.



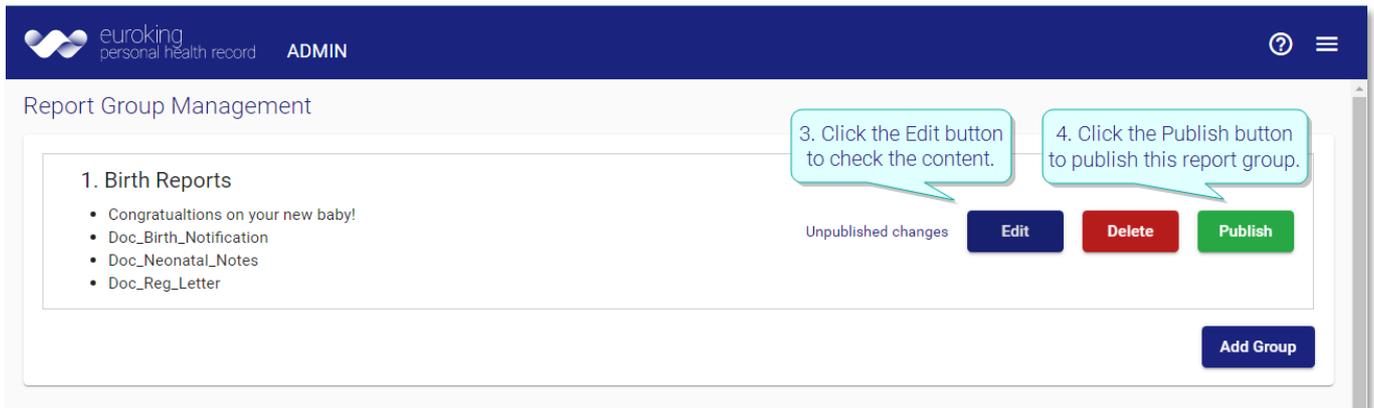
The screenshot shows the 'Edit Report Group' interface. The 'Name' field is 'Birth Reports' and the 'Description' is 'Birth reports for you'. The 'Form Level' is set to 'All'. The 'Available Reports' list includes: AN Contact, Anaesthetic Assessment, Anaesthetic Follow Up, Anaesthetic Procedure, Antenatal Discharge, Birth 2, Current Pregnancy, and Discharge From Care - Mother. The 'Selected Reports' list includes: Doc\_Birth\_Notification, Doc\_Congrats\_Letter, Doc\_Neonatal, and Doc\_Reg\_Letter. The 'Doc\_Congrats\_Letter' report is selected, and its 'Report Name' field is 'Congratulations on your new baby!'. The 'Use default report name' checkbox is unchecked. Callouts indicate: 4. Click the Edit button next to the report. (pointing to the edit icon for Doc\_Congrats\_Letter), 5. Deselect the Use Default tickbox if you want to edit the wording. (pointing to the unchecked checkbox), 6. Edit the text. (pointing to the 'Report Name' field), 7. Click the Update button. (pointing to the update icon for Doc\_Congrats\_Letter), and 8. Click the Save button. (pointing to the Save button at the bottom right). The bottom of the interface has buttons for 'Cancel', 'Revert Unpublished Changes', and 'Save'.

### Note:

New questionnaires, reports, recommendations, or changes will not appear in PHR Patient until you publish them.

## Publish a report group

1. Click the **[Menu]**  button to open the side pane.
2. Click **Report Group Management**.
3. Click the **[Edit]** button to check the content.
4. Click the **[Publish]** button to publish this report group in the patient app.



## Recommendation Management

You can add information or links to websites which are relevant to conditions identified during pregnancy. Recommendations will be shown to the patient, on relevant trimester page, when any of their answers match any of the triggers defined by you.

### Add a recommendation group

1. Click the **[Menu]**  button to open the side pane.
2. Click **Recommendation management**.
3. Click the **[Add Recommendation Group]** button.
4. Enter a name.
5. Click the **[Add Recommendation]** button.
6. Complete the required fields.
7. Click the **[Update]**  button.
8. Click the **[Add Triggers]** button.
9. Select either **Answers** or **Risks** (to choose from either information in E3).
10. Click to expand an item.
11. Select all the relevant tick boxes.
12. Click the **[Assign Triggers]** button.

### Add Recommendation Group

Name\*  
Recommendations for patients with diabetes

**Recommendations**

All Weeks

**New Recommendation** ✓ ✕

Text - Displays during all weeks

Title\*  
New Recommendation

Type  
Link

Display from  
Week 4

Display until  
Week 40

URL\*  
https://wellbeingsoftware.com

Text  
This is useful information

**Triggers**

No triggers selected. Recommendations will be displayed to all patients.

Add Recommendation
Add Triggers

Cancel
Revert Unpublished Changes
Save

### Add Recommendation Group

Name\*  
Recommendations for patients with diabetes

**Recommendations**

Week 4

**New Recommendation** ✎ 🗑

Link - Displays during weeks 4-40

**Select Triggers**

Answers (6 selected) Risks (0 selected)

Benefits Information and Certificates

Bleeding During Pregnancy

Blood Glucose Monitoring  
6 selected

*This woman has diabetes - how often has she been advised to monitor her blood glucose levels?*

<input checked="" type="checkbox"/> Fasting blood glucose	<input checked="" type="checkbox"/> 1 hr after eating
<input checked="" type="checkbox"/> Before bed time	<input checked="" type="checkbox"/> Other
<input checked="" type="checkbox"/> No advice given	<input checked="" type="checkbox"/> Preprandial testing

Blood Group

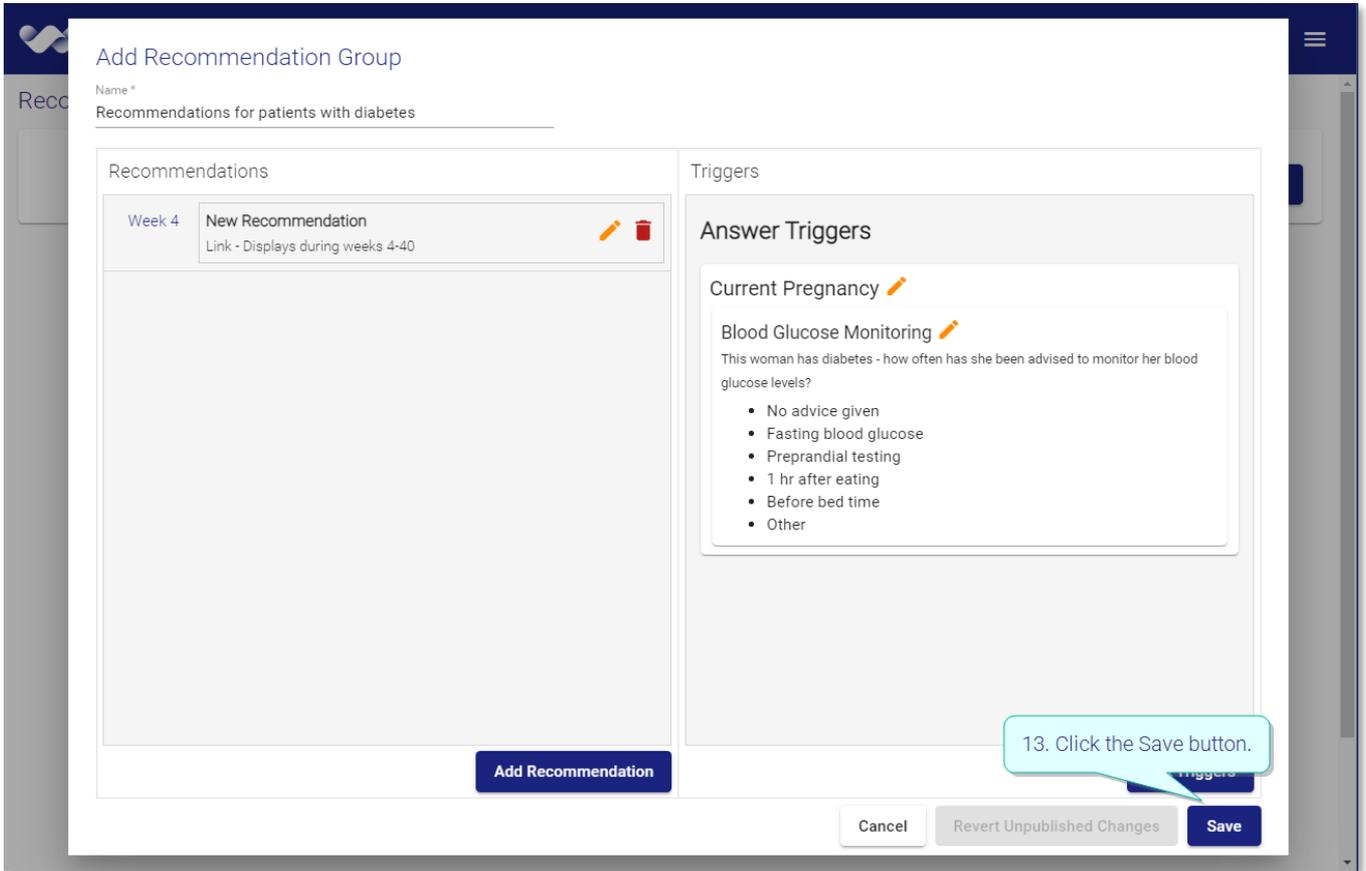
Blood Relative to Baby's Father

Add Recommendation
Assign Triggers

Cancel
Revert Unpublished Changes
Save

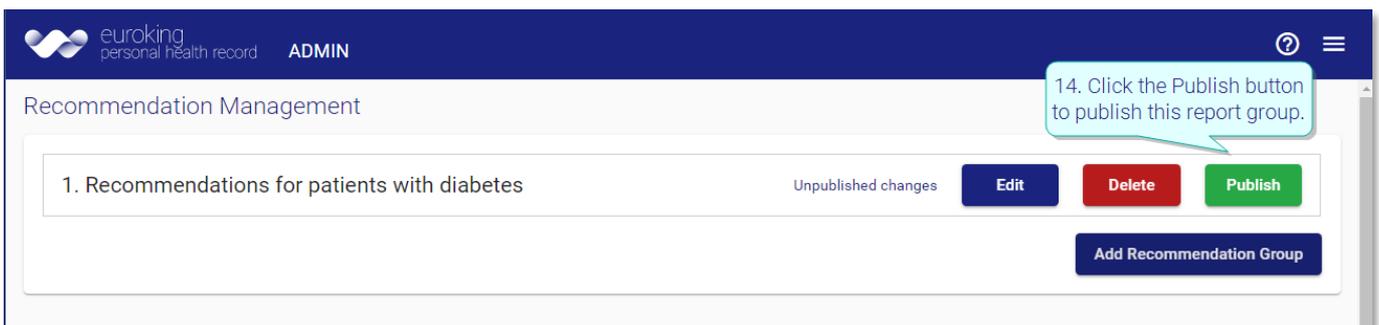
The selected recommendation text or link will be shown when the patient activates the selected triggers.

13. Click the **[Save]** button.



14. Click the **[Publish]** button to make these recommendations available in the patient app.

They will be shown, on the relevant trimester page, if any of the patient's answers match the selected triggers.



**Note:**

If there are no triggers for the group, the recommendations will be shown to *all* patients.

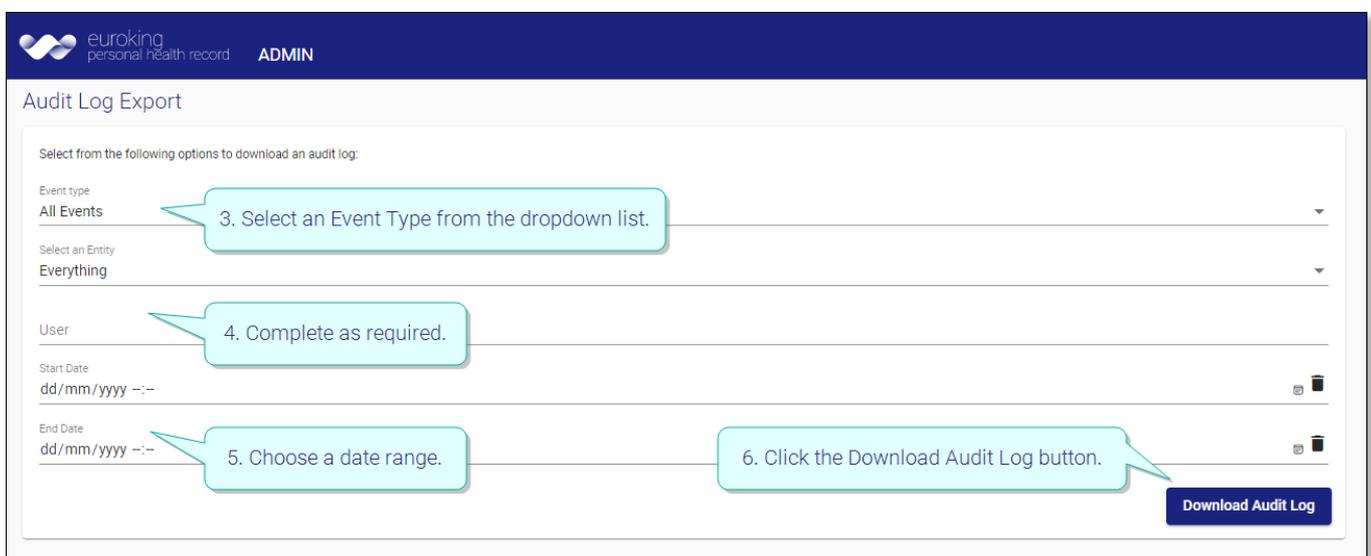
**Tip:**

To remove an item from the trigger list, click the **[Edit]**  button, then deselect the tickbox.

## Audit logs

### Export data

1. Click the **[Menu]**  button to open the side pane.
2. Click  **Audit Logs**.
3. Select an **Event Type** from the dropdown list.
4. Other options will appear depending which Event Type you choose. Complete as required.
5. Choose a date range.
6. Click the **[Download Audit Log]** button.



The screenshot shows the 'Audit Log Export' interface. It includes a header with 'euroking personal health record ADMIN'. The main area contains several input fields: 'Event type' (set to 'All Events'), 'Select an Entry' (set to 'Everything'), 'User' (empty), 'Start Date' (dd/mm/yyyy), and 'End Date' (dd/mm/yyyy). A 'Download Audit Log' button is located at the bottom right. Callouts point to the 'Event type' dropdown (step 3), the 'User' field (step 4), the date range fields (step 5), and the 'Download Audit Log' button (step 6).

A CSV file is automatically saved to your local download location.

In this example, you can see the date and time of every log in by the user "Training".

	A	B	C	D	E	F	G	H
1	username	entity	action	item	oldvalue	newvalue	PK	date
2	Training	User.Login	Login					18/05/2022 08:09
3	Training	User.Login	Login					18/05/2022 11:02
4	Training	User.Login	Login					18/05/2022 11:37
5	Training	User.Login	Login					18/05/2022 13:37
6	Training	User.Login	Login					18/05/2022 15:03
7	Training	User.Login	Login					18/05/2022 15:14
8	Training	User.Login	Login					18/05/2022 15:53
9	Training	User.Login	Login					18/05/2022 16:49
10	Training	User.Login	Login					19/05/2022 06:58

## Available information

You can see the following event types (actions), who did them, and when.

- Added, Deleted, or Modified. Filter by Contact Information, Journal Entries, Observations, Questionnaires, Recommendation Groups, Report Groups, Useful Websites.
- Log in, Log out, Failed log in.
- Password reset success, Password reset requested.
- Submit to E3.
- Navigation.
- External link.

## User

- User Log in / Log out.
- User Screen access / click (i.e. footprint through system).

## Changes to Questionnaires

- New section added / deleted / revised.
- New items (questions) added / deleted / revised in each section.
- Any label changes on sections added / deleted / revised.
- Any help text added / deleted / revised.
- Any changes to question text added / deleted / revised.

## Changes to Useful Websites

- Any sections and contents (label / URL) added / deleted / revised.

## Changes to Contact Info

- Any sections and contents (label / URL) added / deleted / revised.

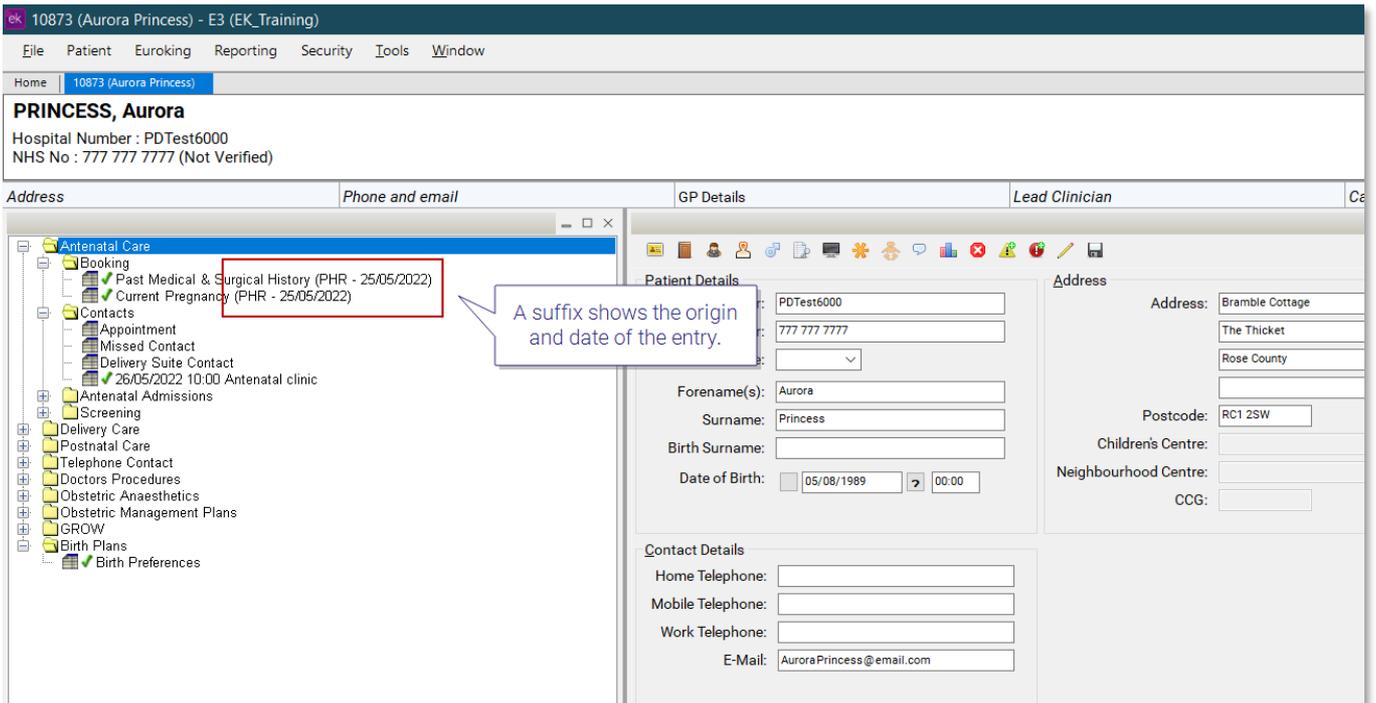
## Changes to Report Groups

- New section added / deleted / revised.
- New items (questions) added / deleted / revised in each section.
- Any label changes on sections added / deleted / revised.
- Any help text added / deleted / revised.
- Any changes to question text added / deleted / revised.

## Patient information from PHR in EuroKing

### Questionnaires

When a patient adds information via PHR, the relevant questionnaire is updated in EuroKing. A suffix shows the origin and date of the entry.



#### Note:

Any subsequent updates will overwrite the original answers, providing a current record at all times. However, previous answers can be viewed via **Tools > Top View** in the main EuroKing application.

### Observations and Journal

These sections of PHR allow the patient to record weight; blood pressure; and urine test results, and make personal notes. Observations and Journal notes are not transferred to EuroKing and **will not be seen by their care providers**. This warning is in the patient document EK\_CRIB\_AM\_730\_E3\_PHR\_Patient\_Guide:

#### Warning:

This information is for your personal use only. If you have any concerns, please contact your midwife directly.

## Document Control

Title	PHR System Administration		
Owner	HSS Training Manager	Date Created	11/01/2019
File Ref.	EK_CRIB_AM_731_E3_PHR_System_Administration_D2.1.docx		
CRIS Version			
Change History			
Issue	Date	Author / Editor	Details of Change
D1.0	11/01/2019	Emma Brown	Draft Issue
V1.0	17/07/2019	Emma Savage-Mady	First Issue updated to align with v1.4.0
D2.0	18/05/2022	Emma Brown	Draft Issue for PHR Admin v2.1. New functionality added.
V2.0	06/06/2022	Emma Brown	Checked by Product Owner. Published.
Review Date	18/05/2022		