EUROKING Patient Health Record System Administration

Training Department

18/05/2022

Contents

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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:

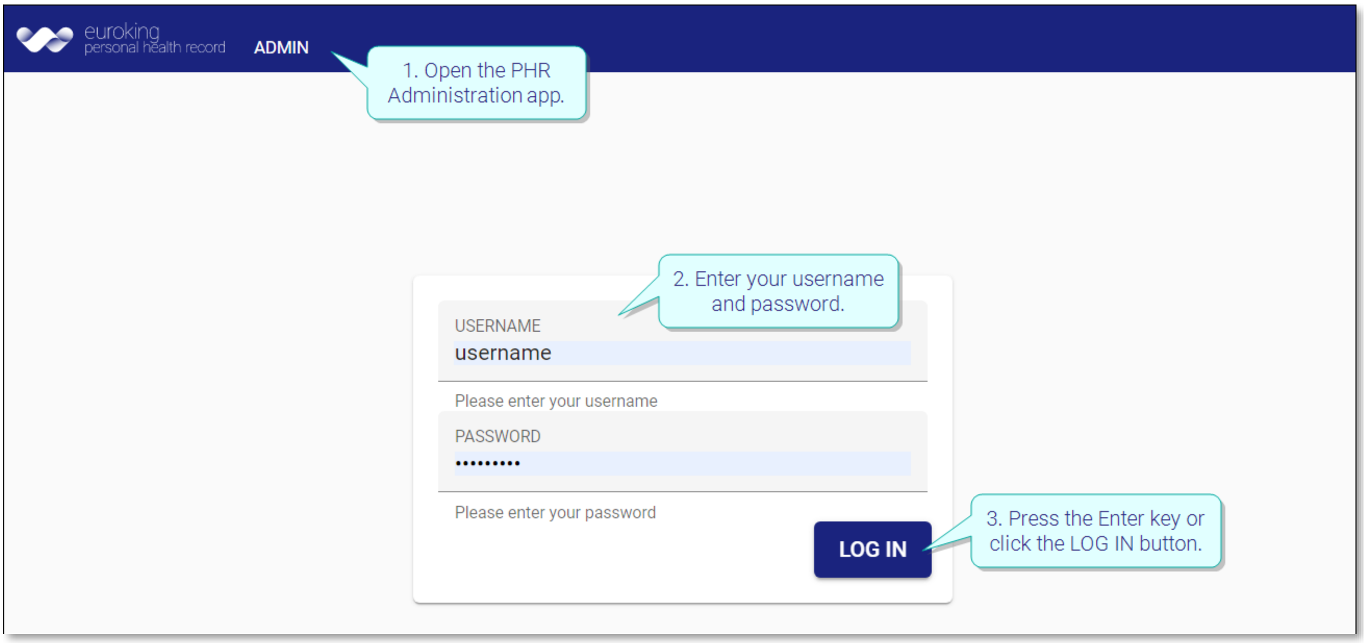
- Patients who have been granted access to their own Personal Health Record.
- Hospital staff who are members of the EuroKing administrator group.

> 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.



Patient

Patients can access PHR via a link which is emailed to them. See EK_CRIB_AM_730_E3_PHR_Patient_Guide.

Dashboard

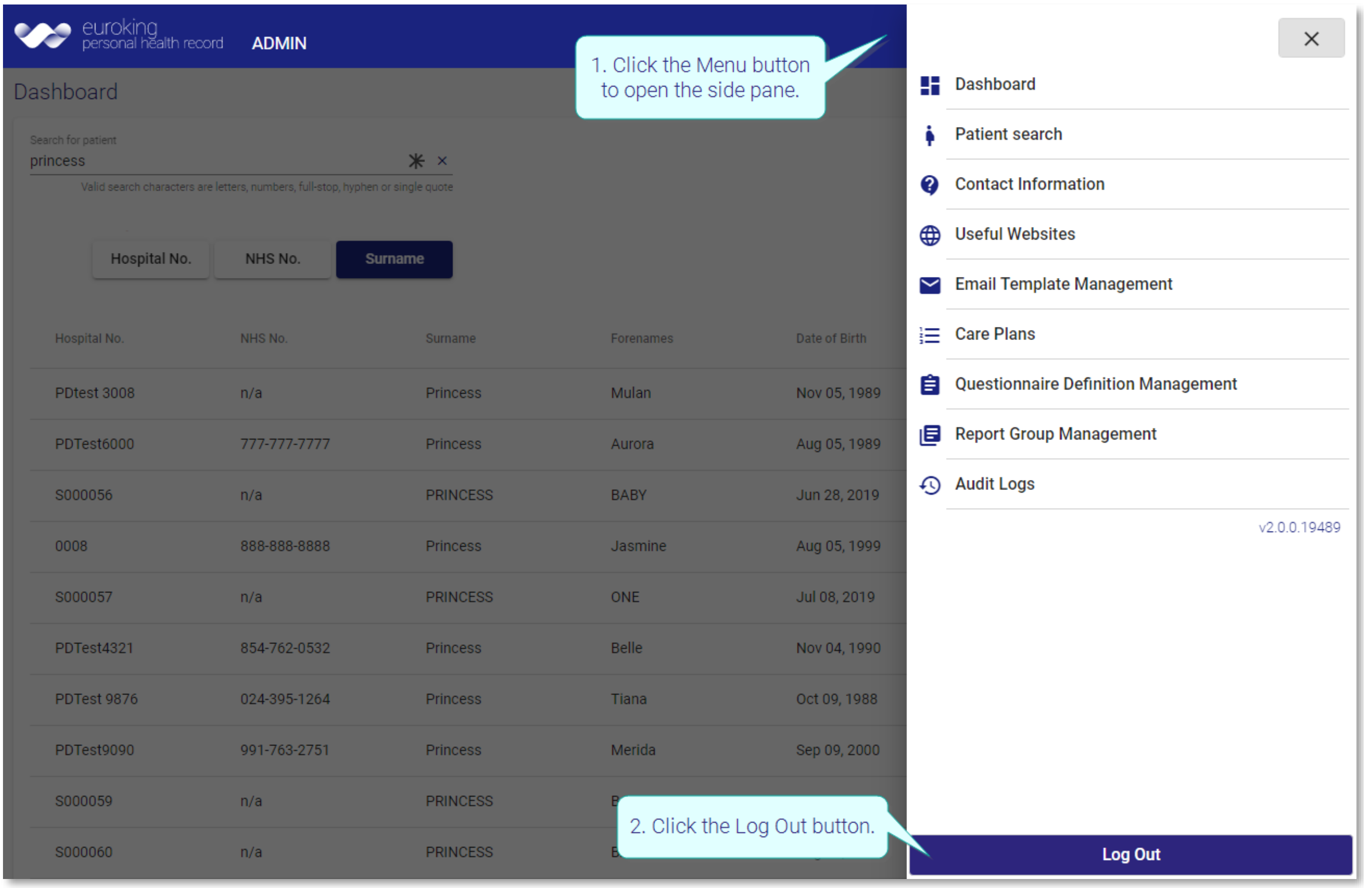
The home page Dashboard shows:

- 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.

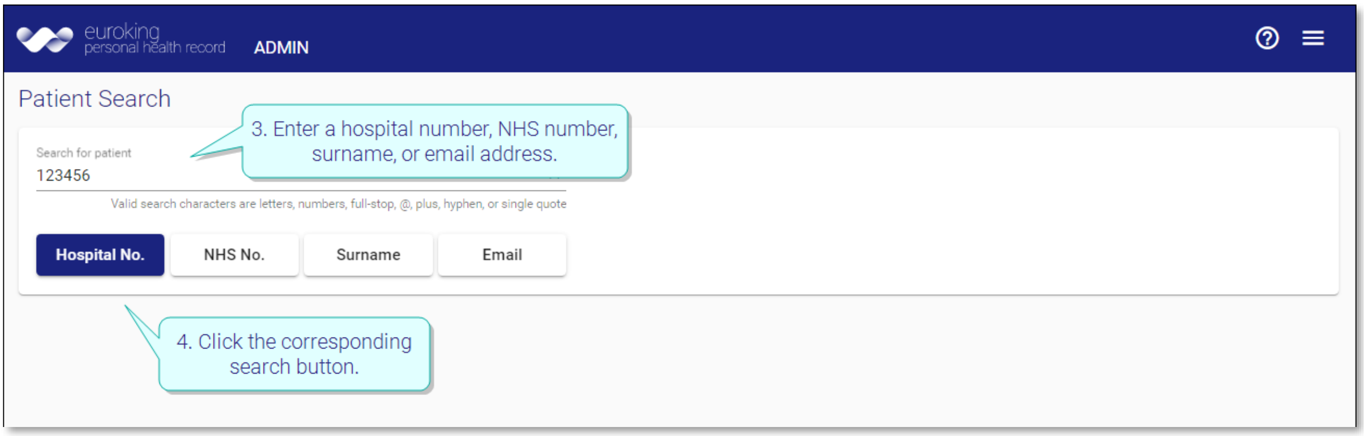


Note:

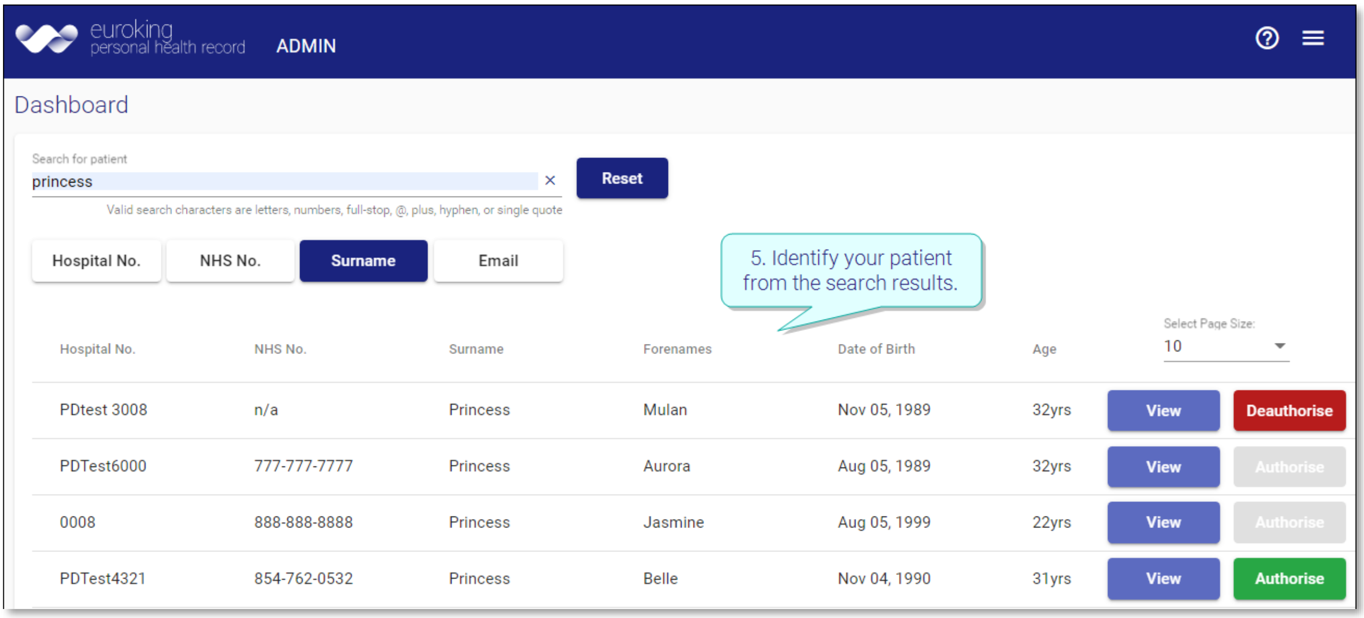
You will be automatically logged out after 30 minutes of inactivity.

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.



5. Identify your patient from the search results.



Tip:

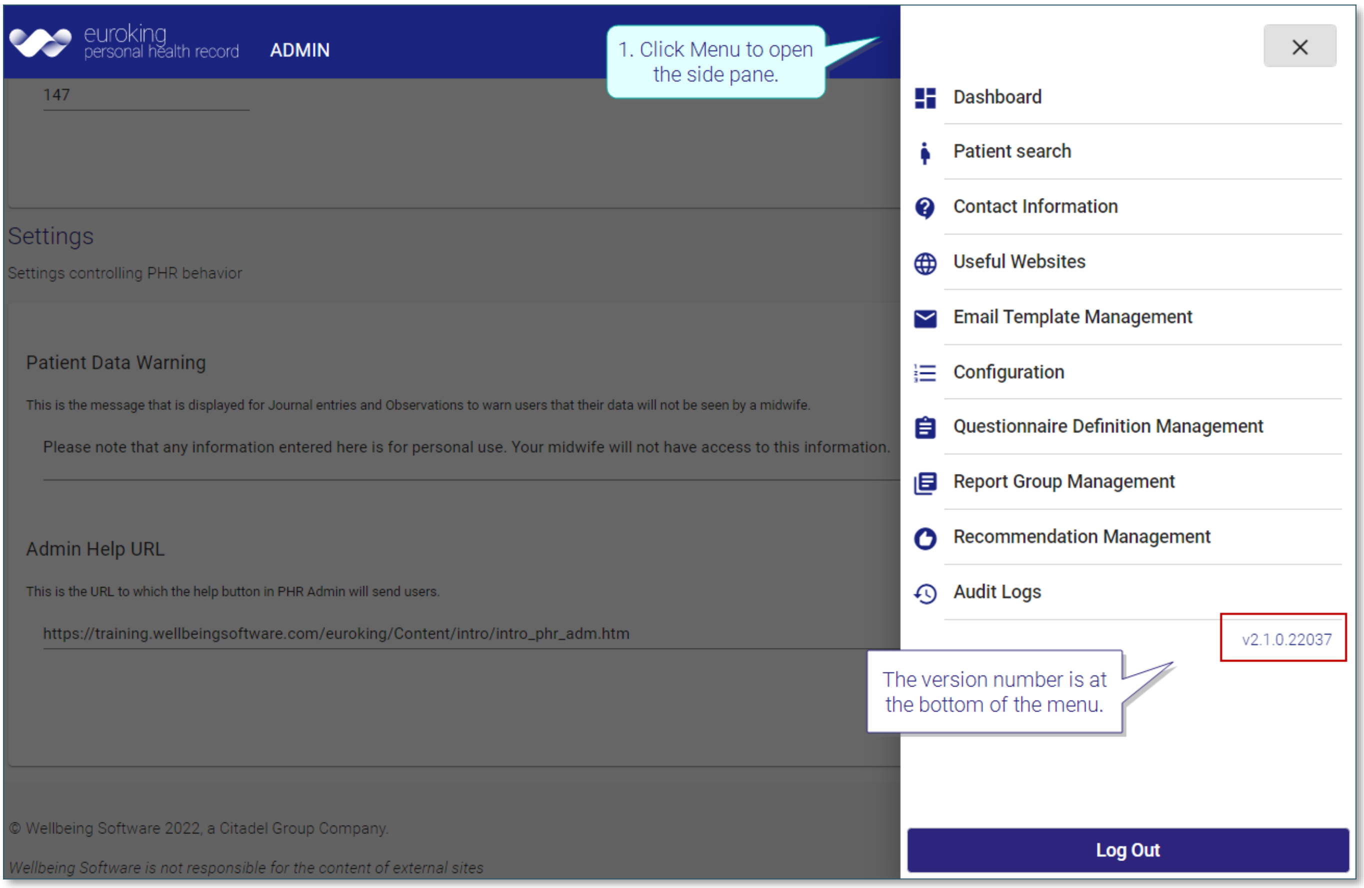
Hospital number	Hospital number is the preferred search term.
NHS number	NHS number is also recommended.
Surname	Exact match only. Enter the full surname.
Email	Exact match only. Enter the full email address.

> 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.



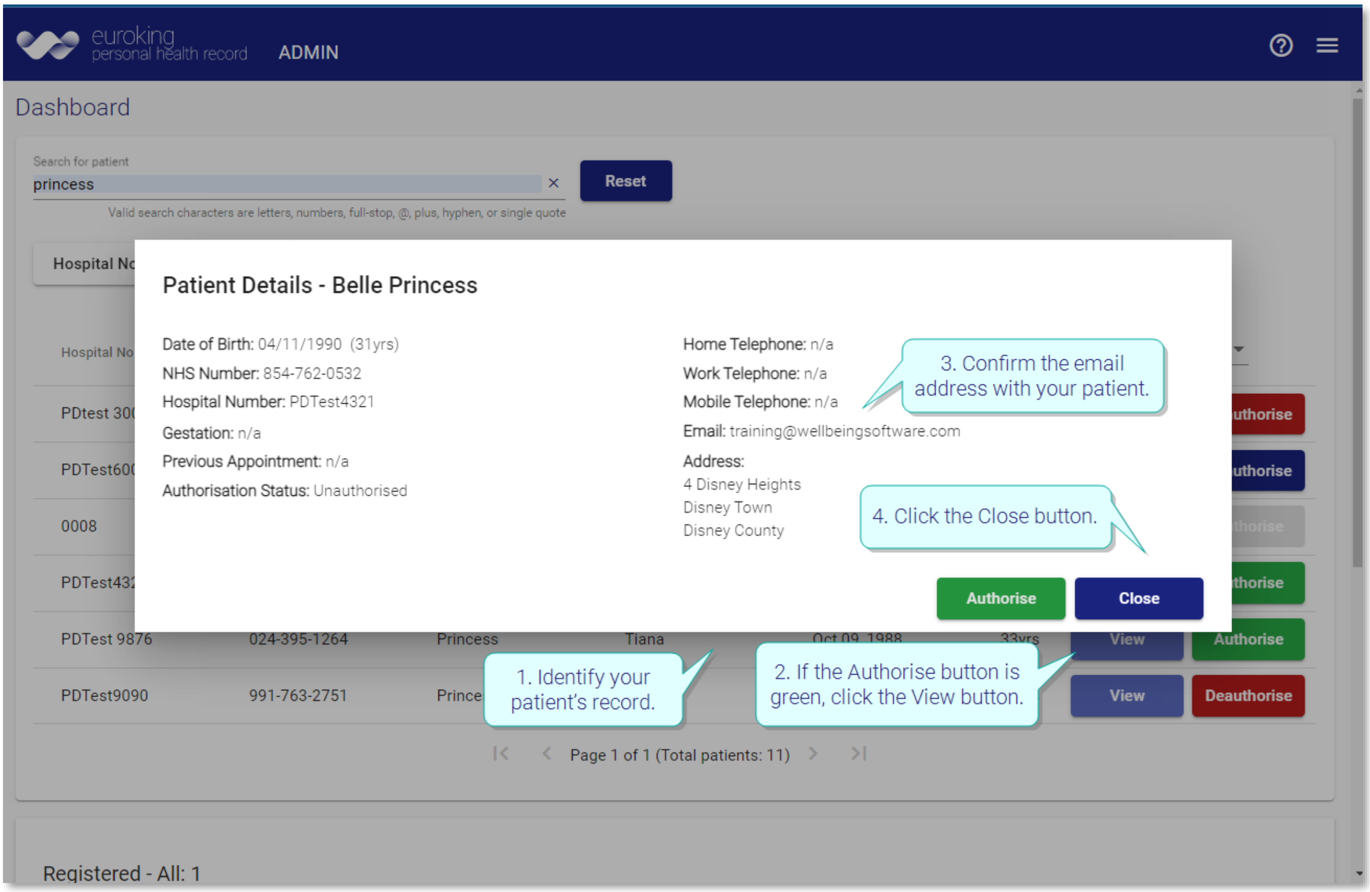
Authorise Patient Access

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

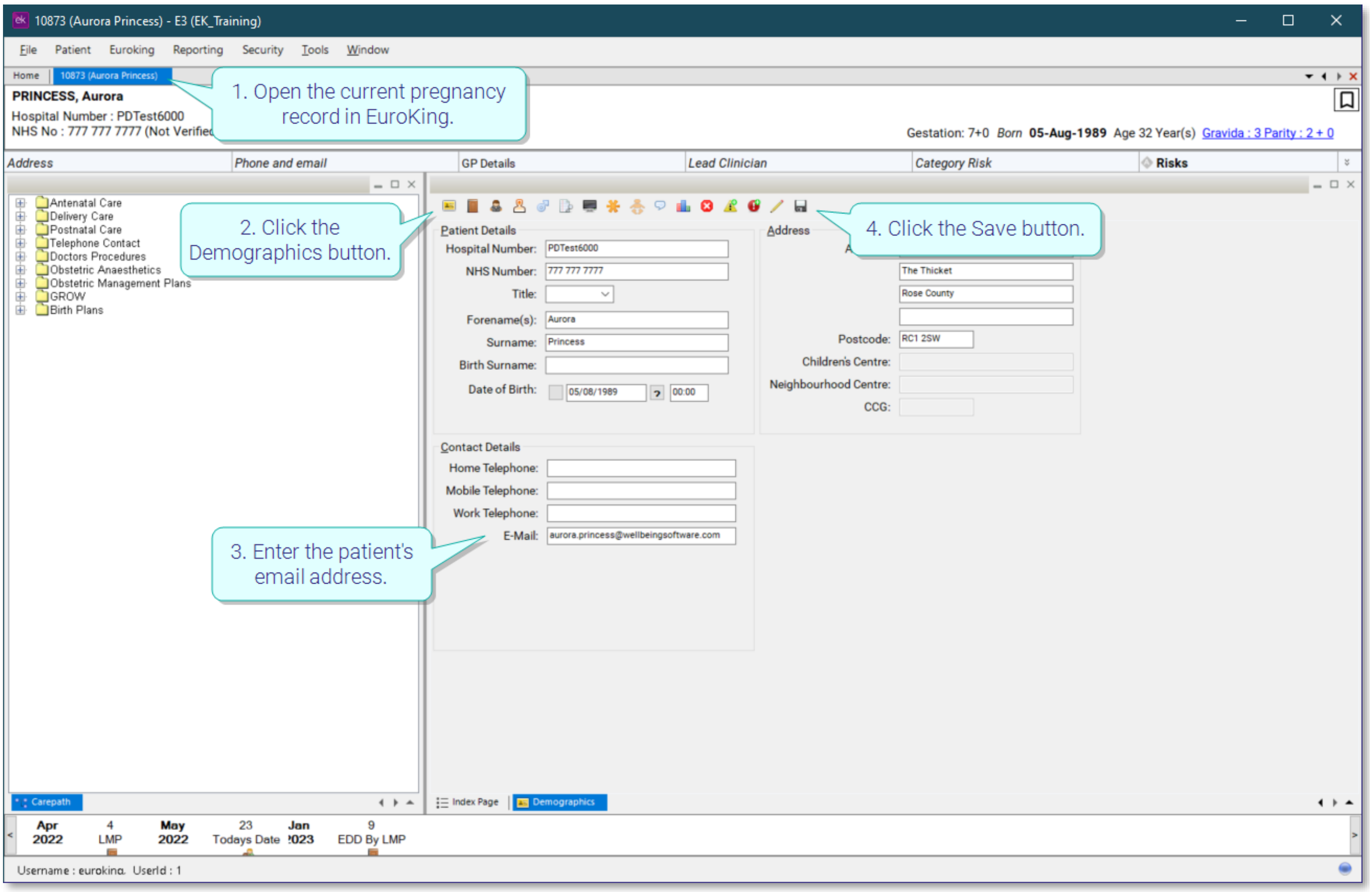
1. Identify your patient's record.
2. If the **[Authorise]** button is green, click the **[View]** button.
3. Confirm the email address with your patient.
4. Click the **[Close]** button.



Button	Description
View	Click to view patient demographics, including email address.
Authorise (grey)	The patient's record does not contain an email address. You can add an email address via EuroKing (see below).
Authorise (green)	The patient's record contains an email address. Click to grant access.
Deauthorise	The patient has been granted access to PHR. Click to revoke access.
Reauthorise	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.



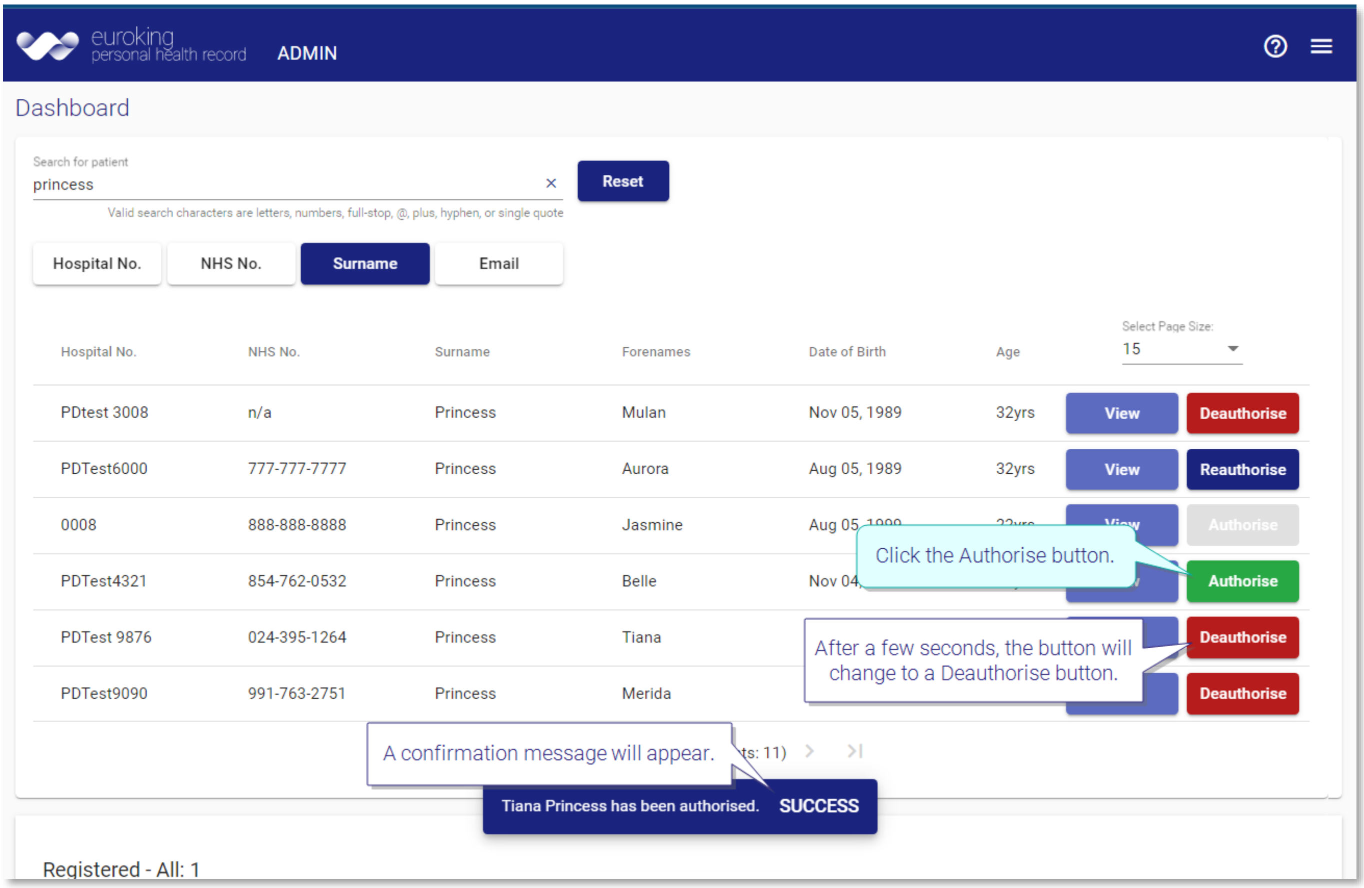
1. Open the current pregnancy record in EuroKing.
2. Click the **[Demographics]** button.
3. Enter the email address.
4. Click the **[Save]** button.

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.



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.

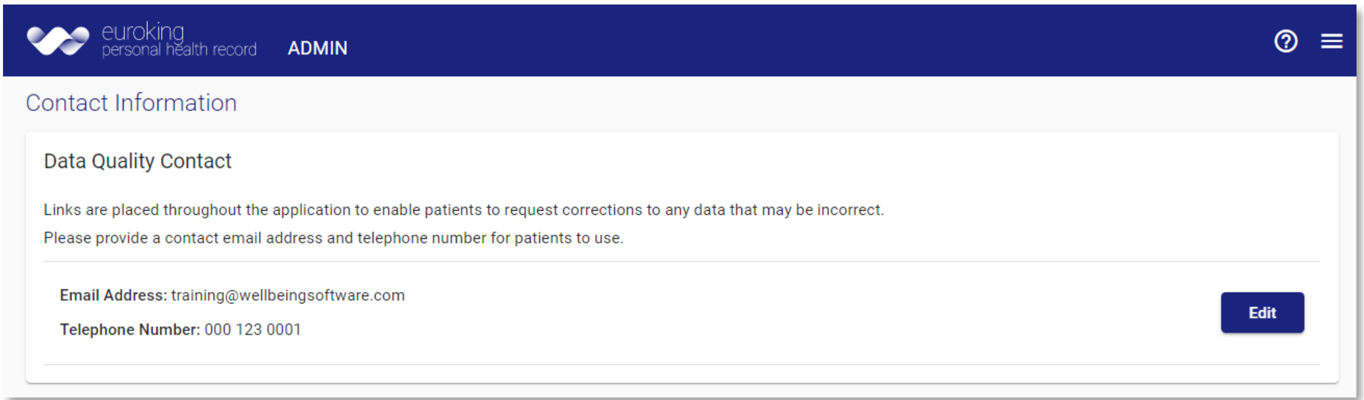
An email with a registration link will be sent to the patient. The link expires after 72 hours.

Contact information

Add a Data Quality contact

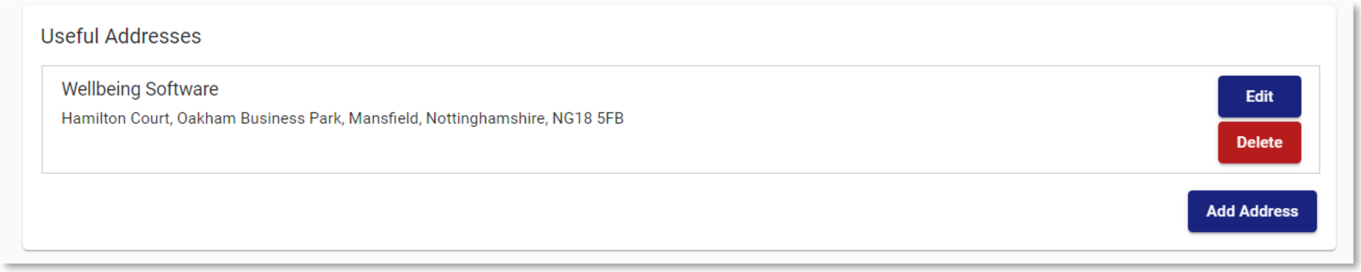
Links are placed throughout the application to enable patients to request corrections to any data that may be incorrect. Please provide a contact email address and telephone number for patients to use.

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.



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.

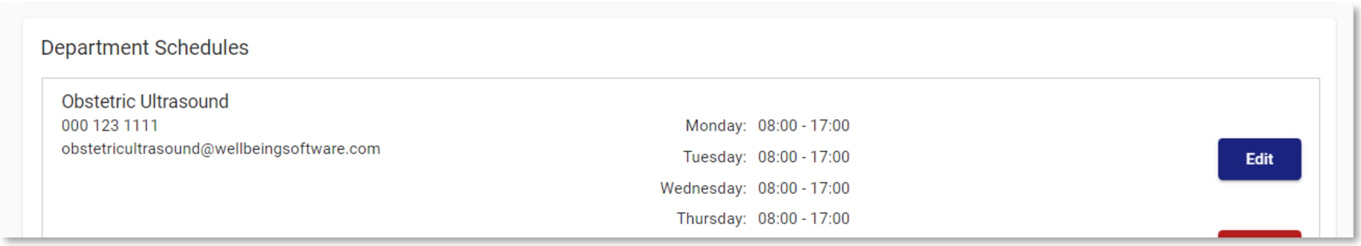


Note:

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.



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

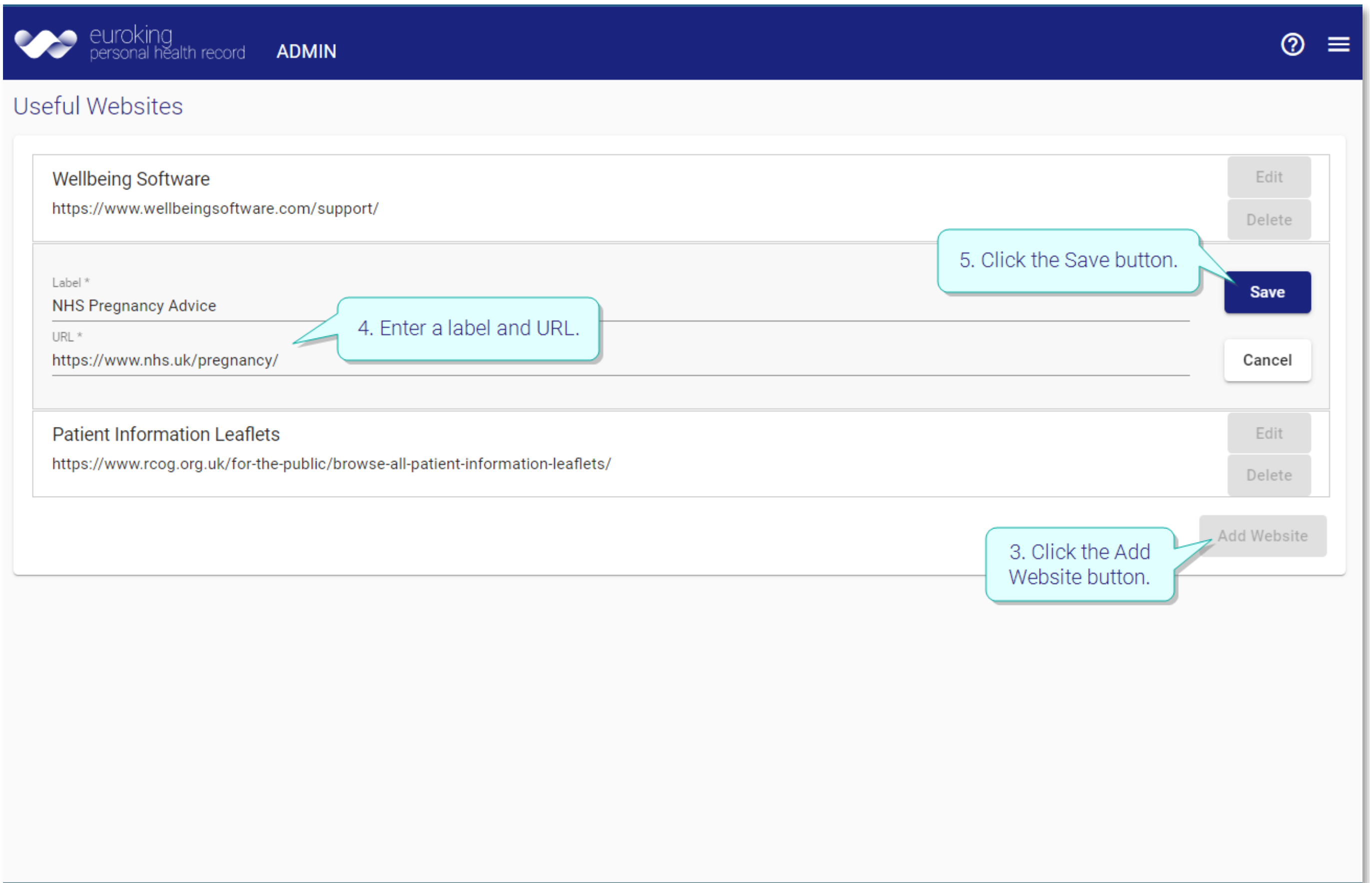
1. Click the **[Menu]** button to open the side pane.

2. Click **Useful Websites**.

3. Click the **[Add Website]** button.

4. Enter a label and URL.

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

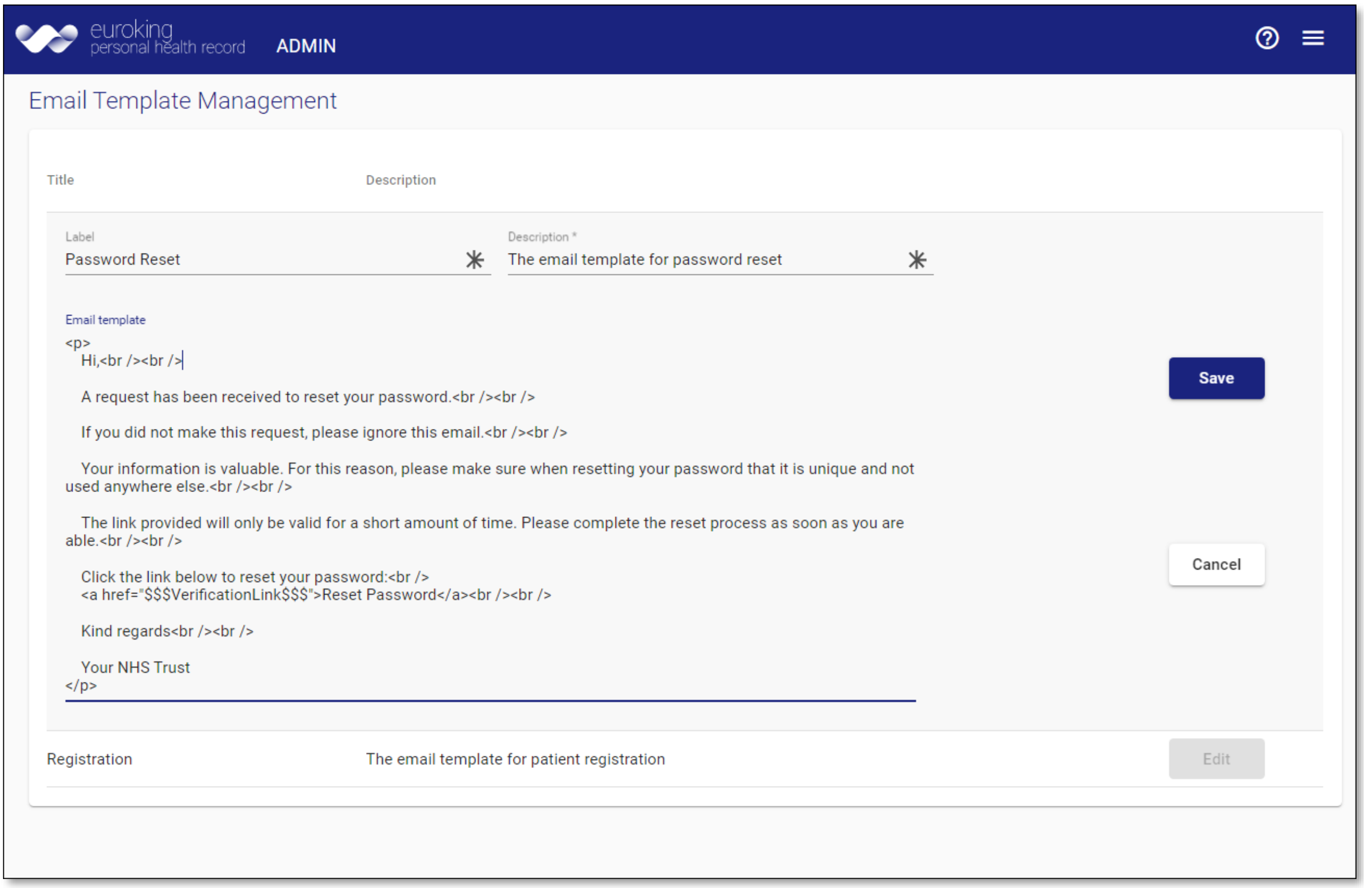


Email template management

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.

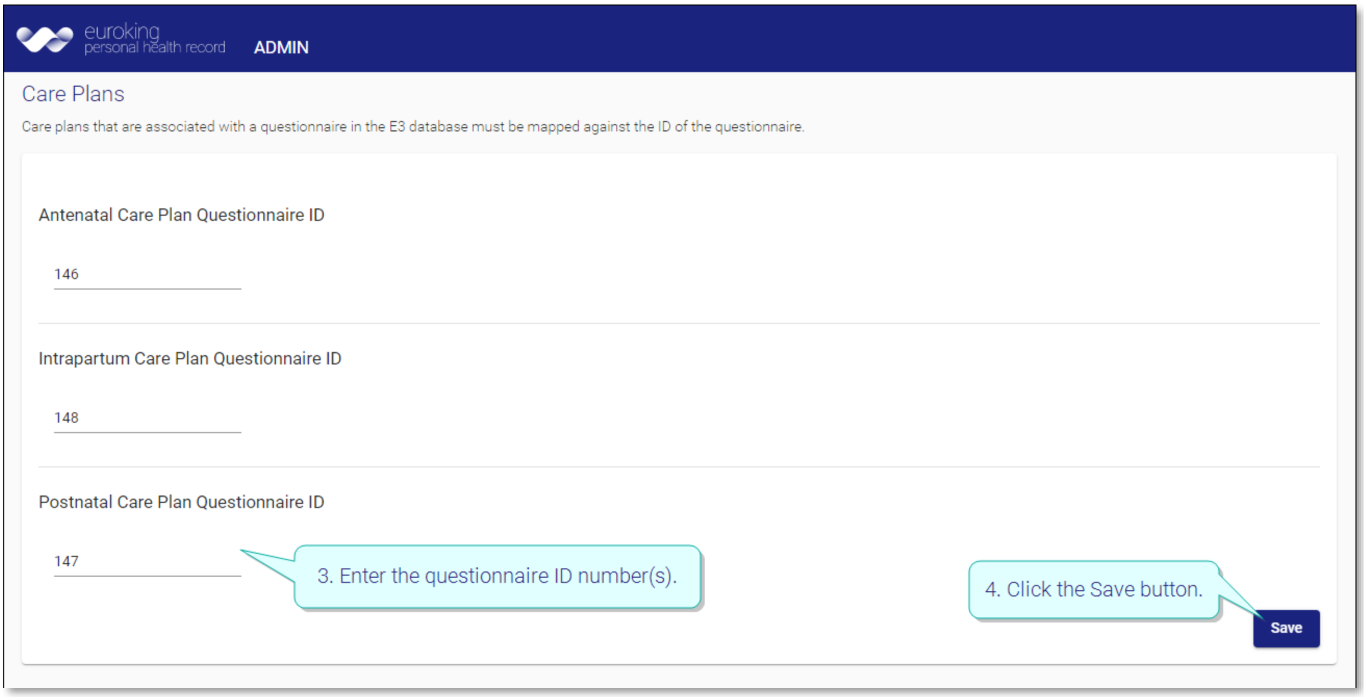
> Tip:
>
> You can use HTML to format your email.
 adds a line break. It does not require a closing tag. adds a hyperlink to URL. The closing tag is . Insert the text you want to display for the link between the tags, as in this example: Wellbeing Software website



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.



Tip:

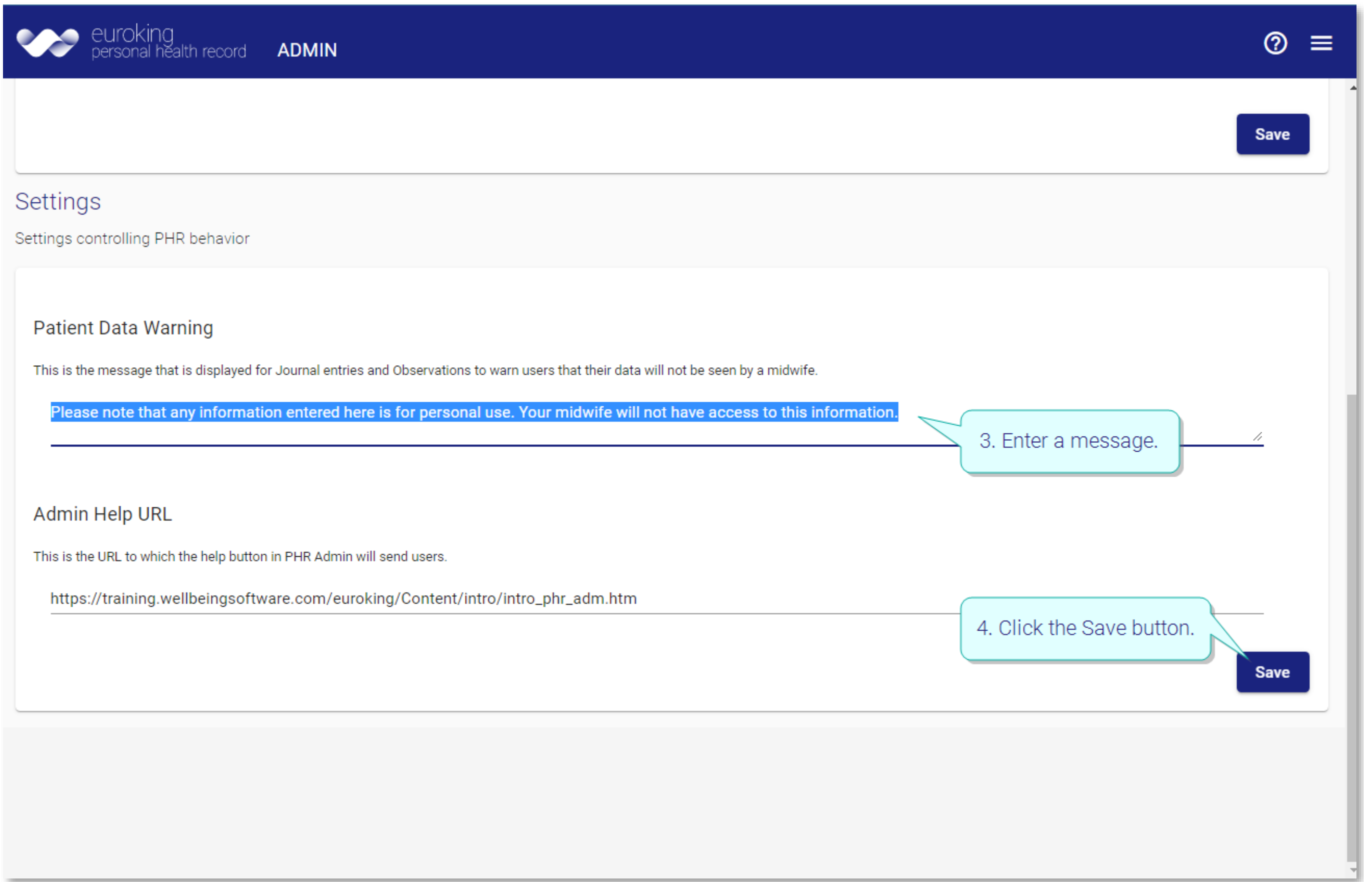
You will find questionnaire ID numbers in EuroKing via Tools > Questionnaire Setup.

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".

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



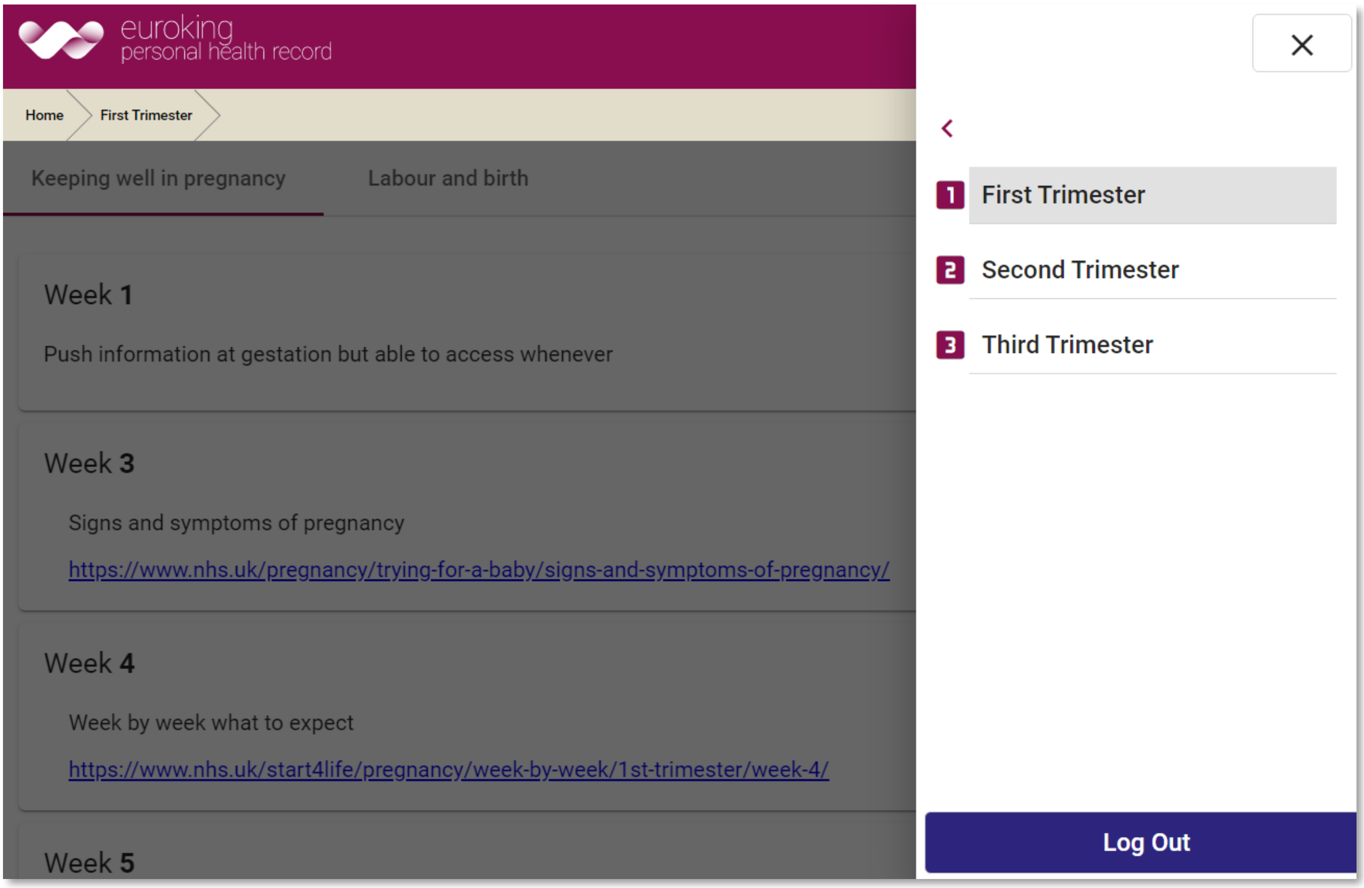
Help URL

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

1. Click the **[Menu]** button to open the side pane.
2. Click **Configuration**.
3. Enter a URL, for example https://training.wellbeingsoftware.com/euroking/
4. 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.



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

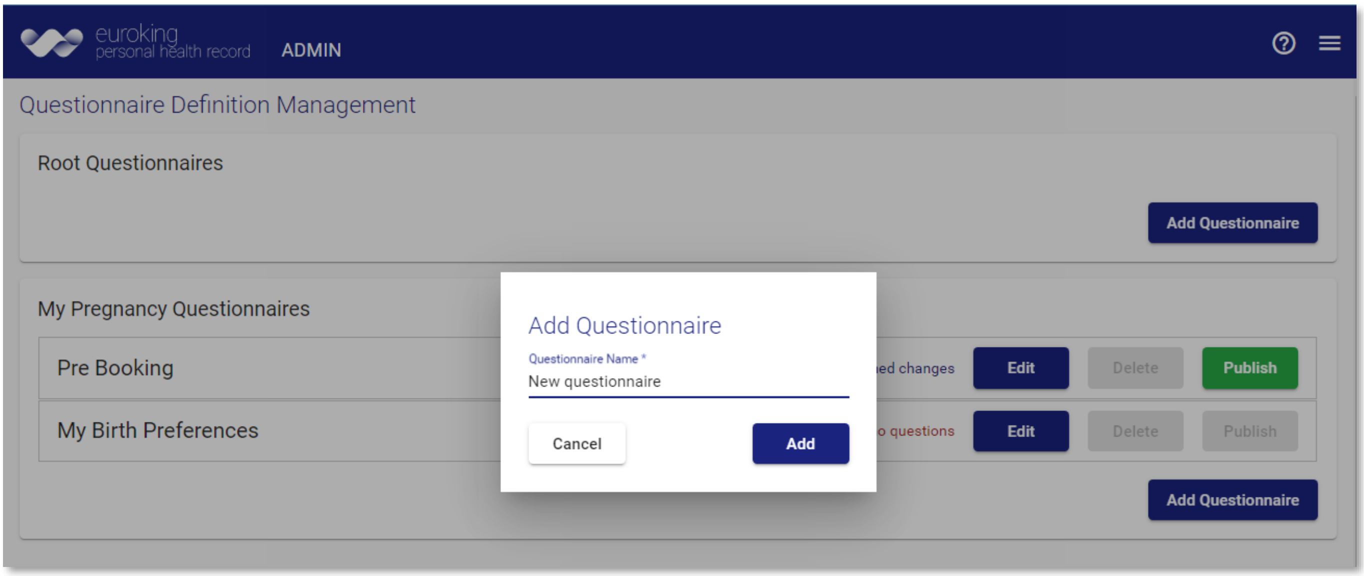
Questionnaire Definition Management

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.

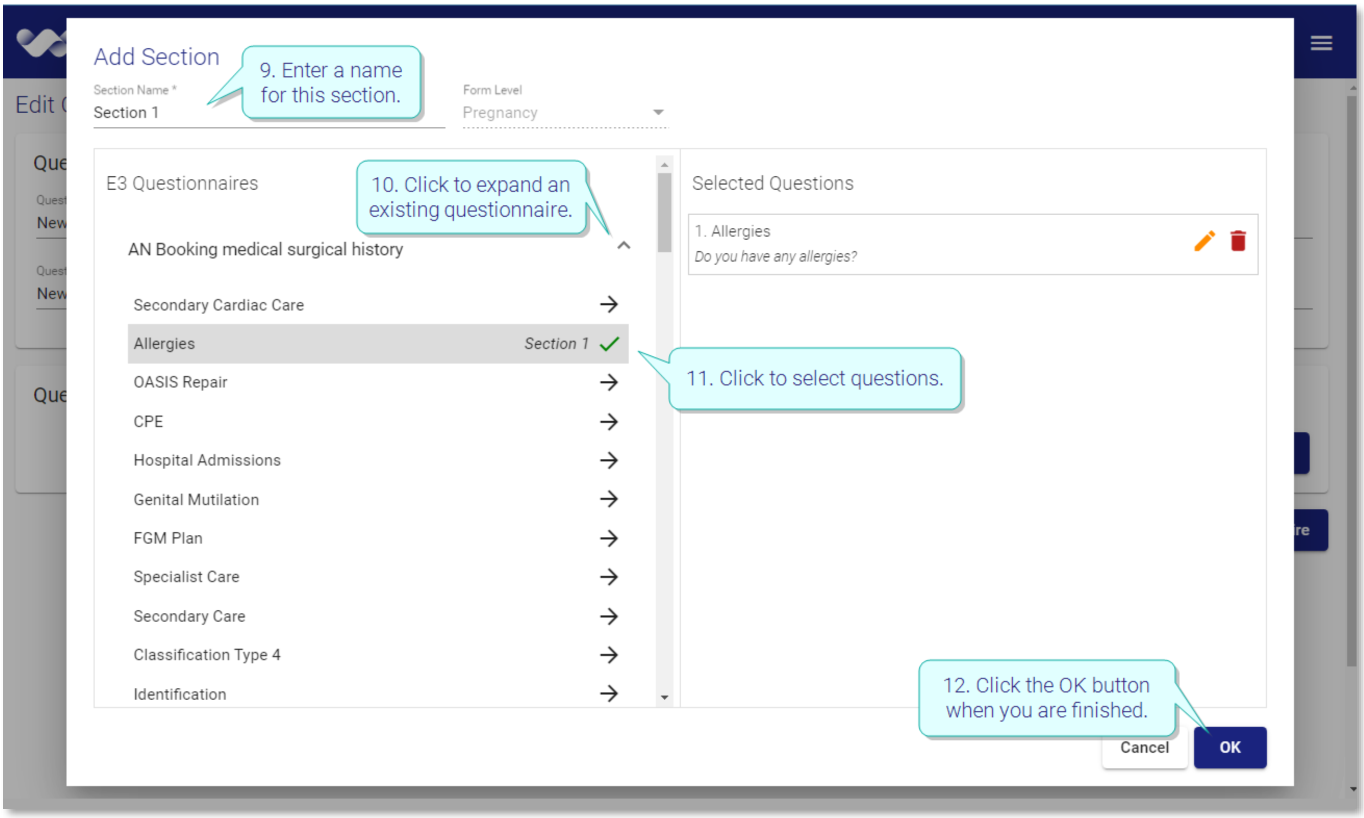
Add a questionnaire

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.

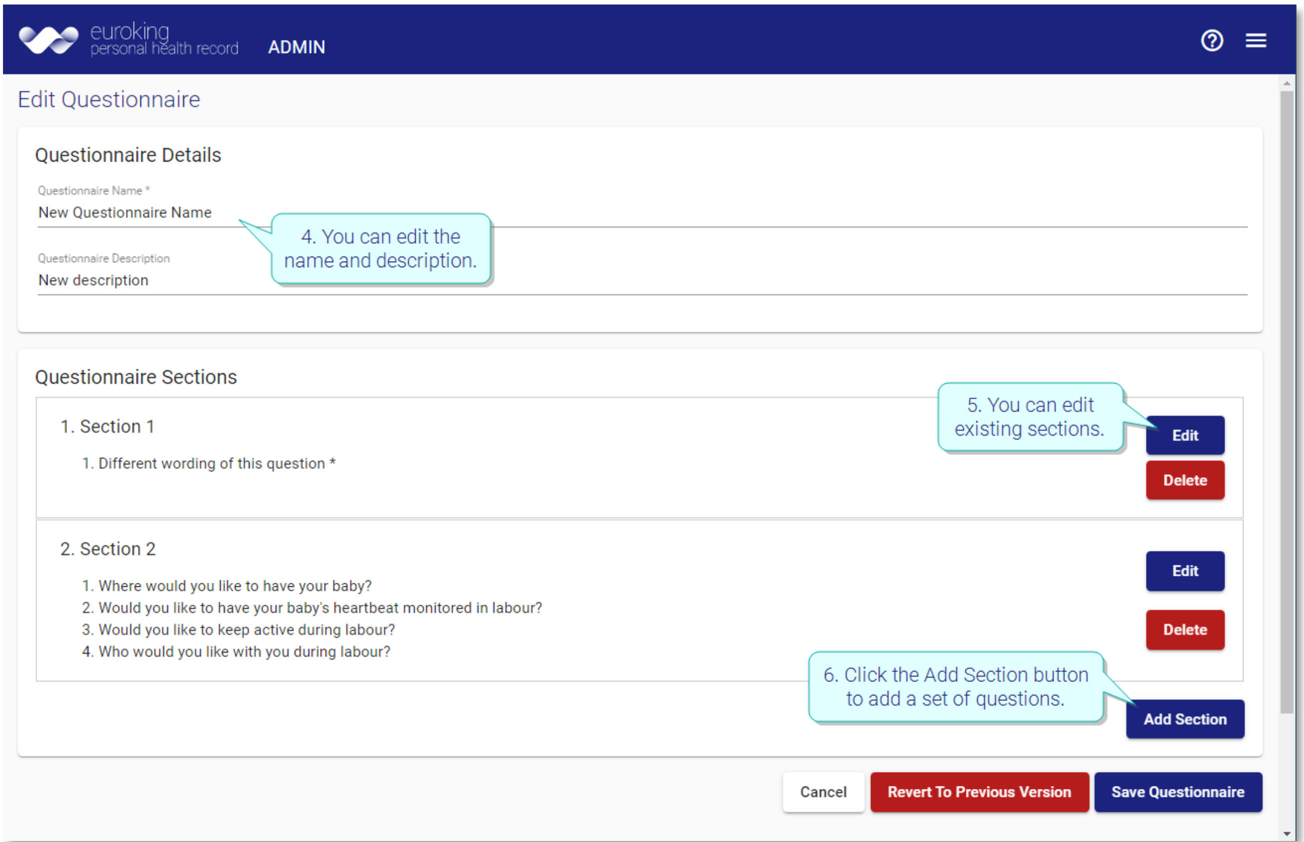


Note:

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 <u>E3</u> panel on the left..
9. Click a question to add it to the <u>Selected Questions</u> 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.

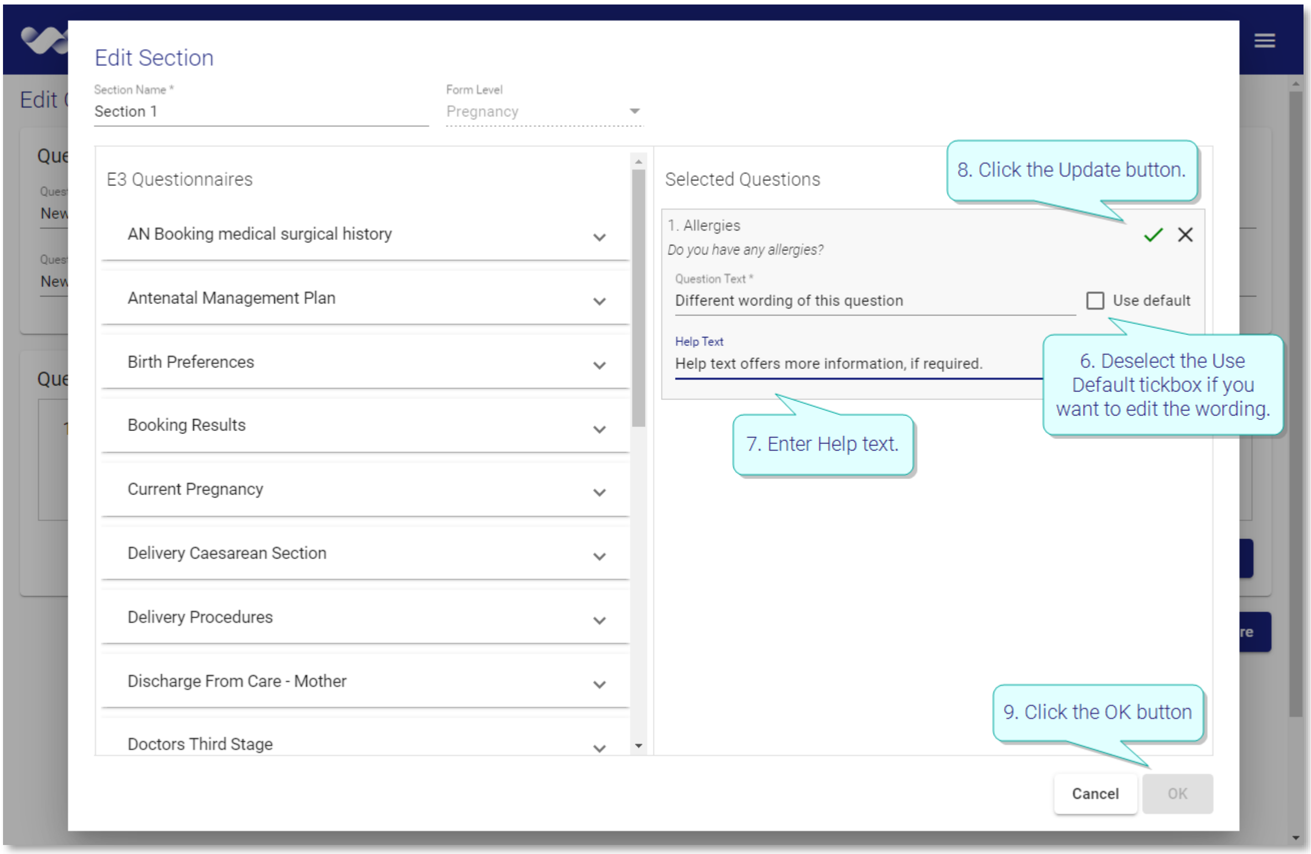


Note:

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

Edit a question

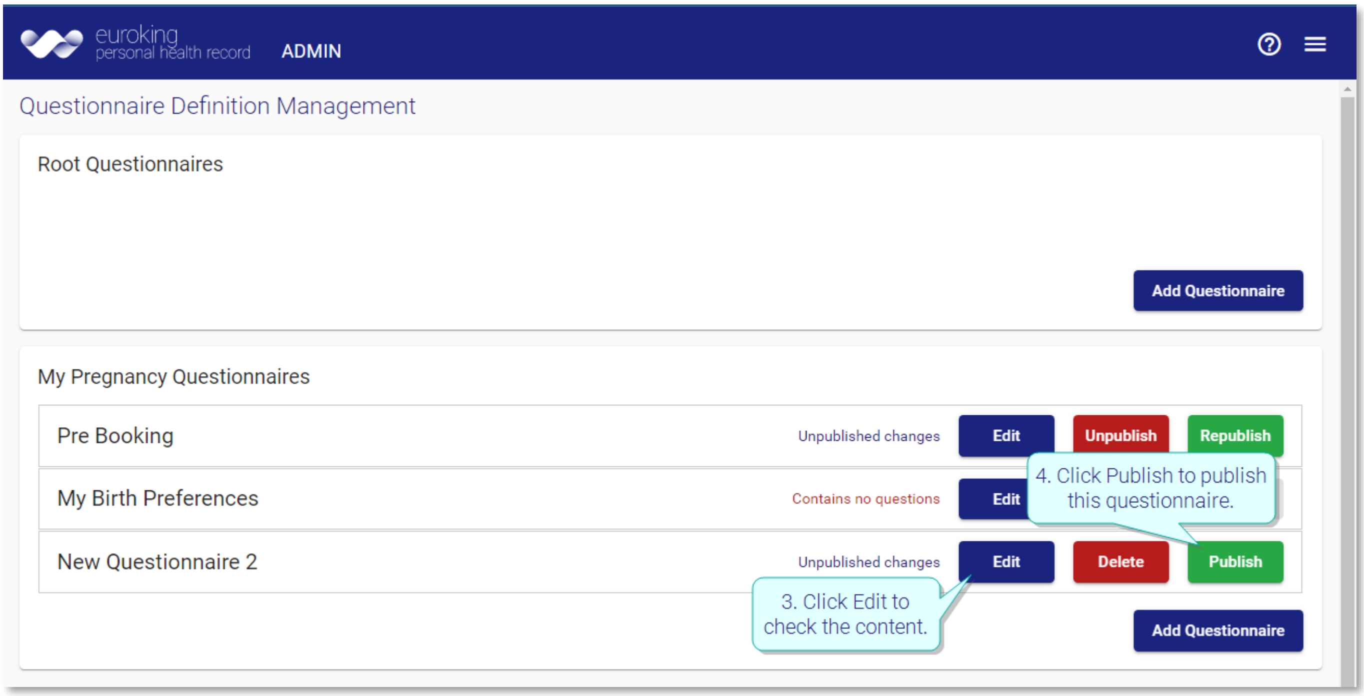
1. Click the **[Menu]** button to open the side pane.
2. Click **Questionnaire Definition Management**.
3. Click the **[Edit]** button next to the questionnaire.
4. Click the **[Edit]** button next to the section.
5. Click the **[Edit]** button next to the question.
6. Deselect the **[Use Default]** 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.

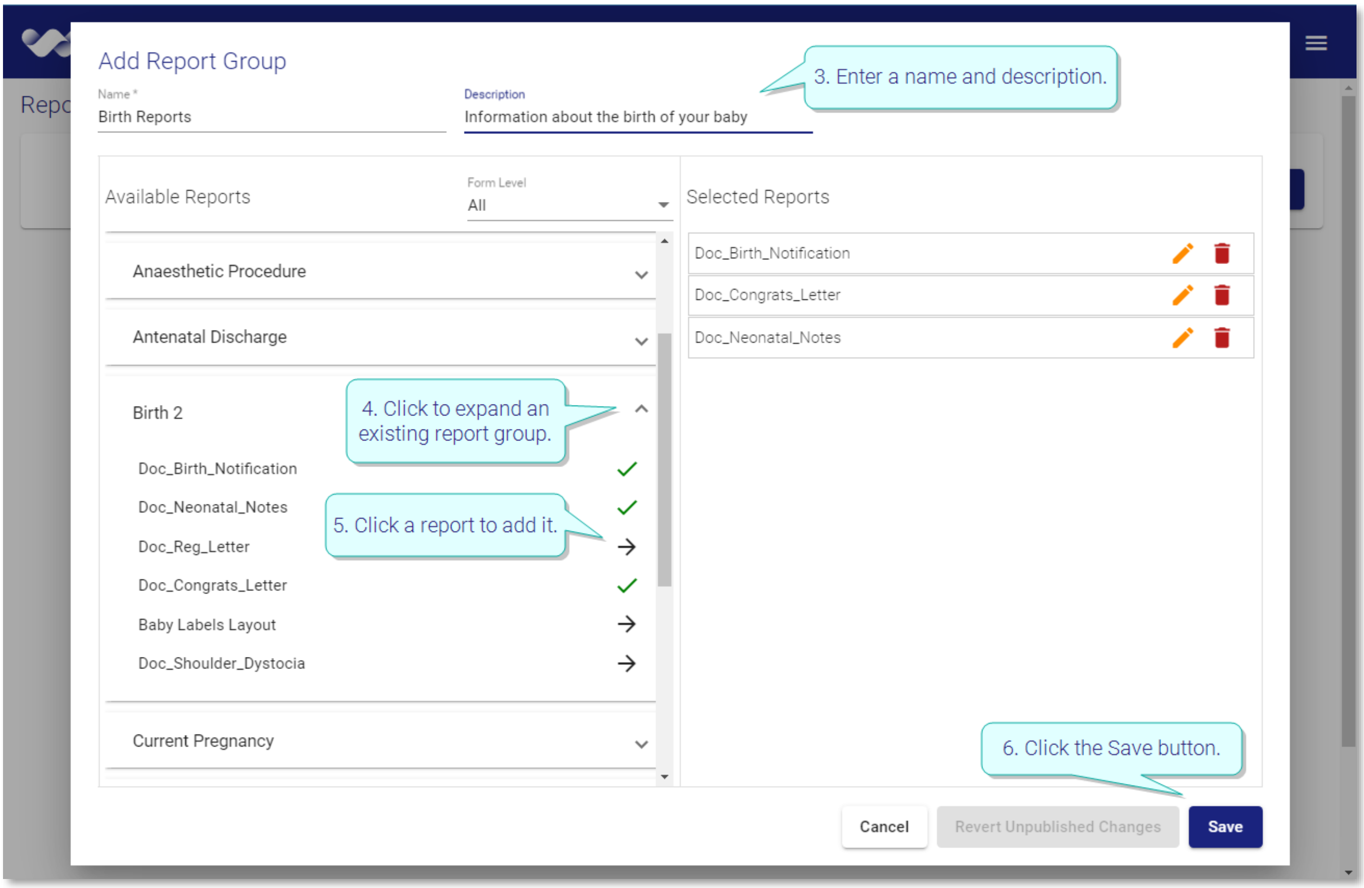
Publish a questionnaire

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.



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.

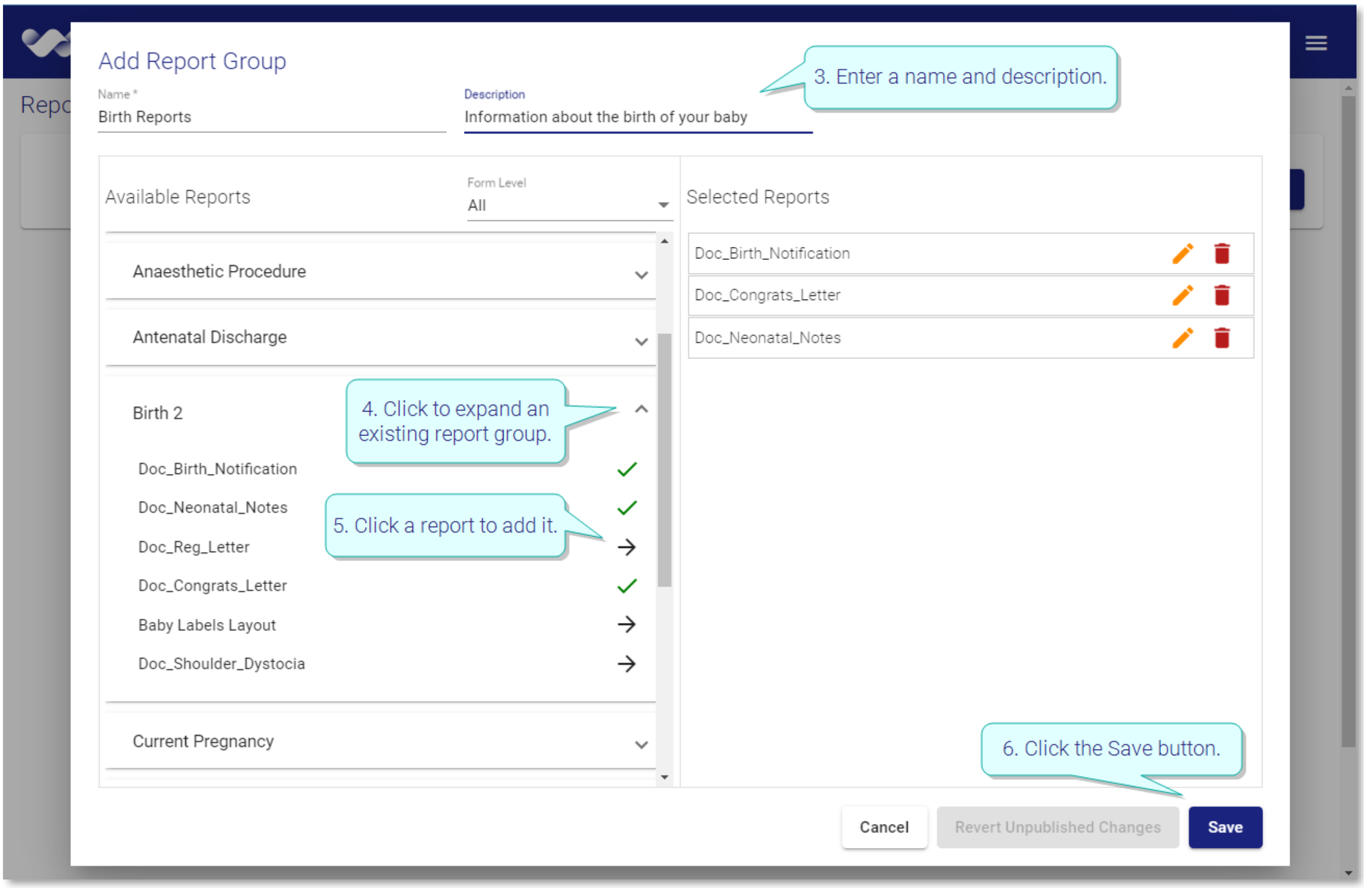


Note:

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.

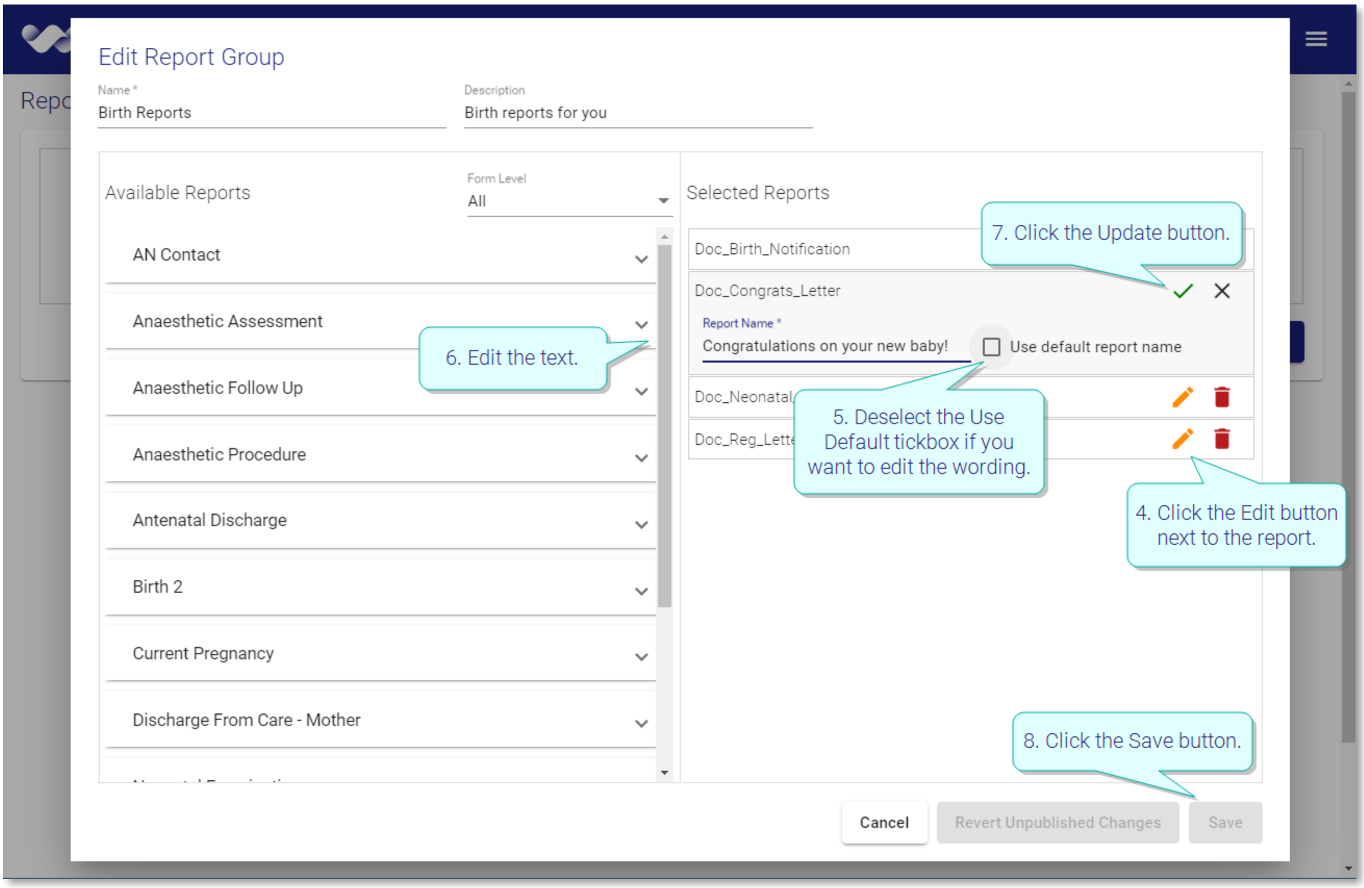


Note:

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.

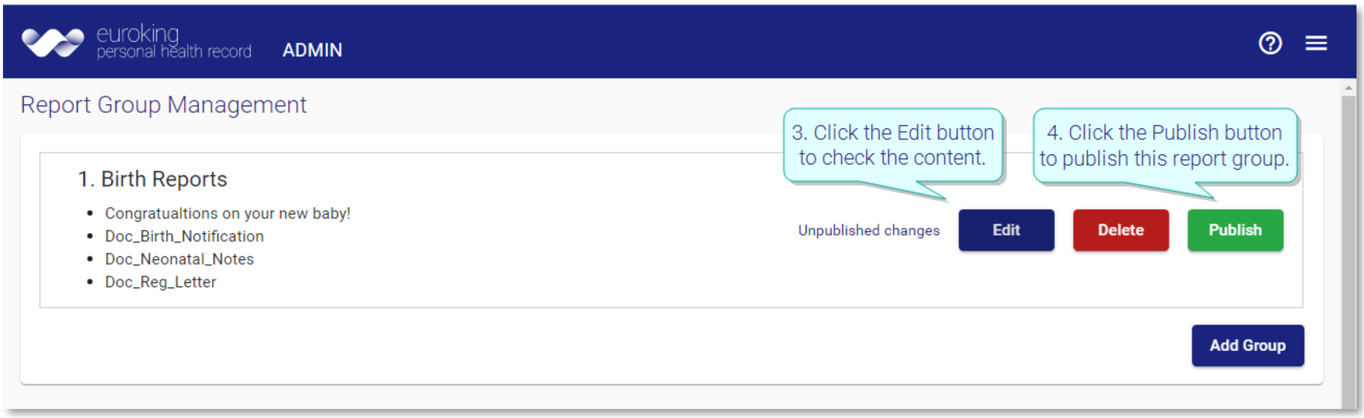


Note:

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.

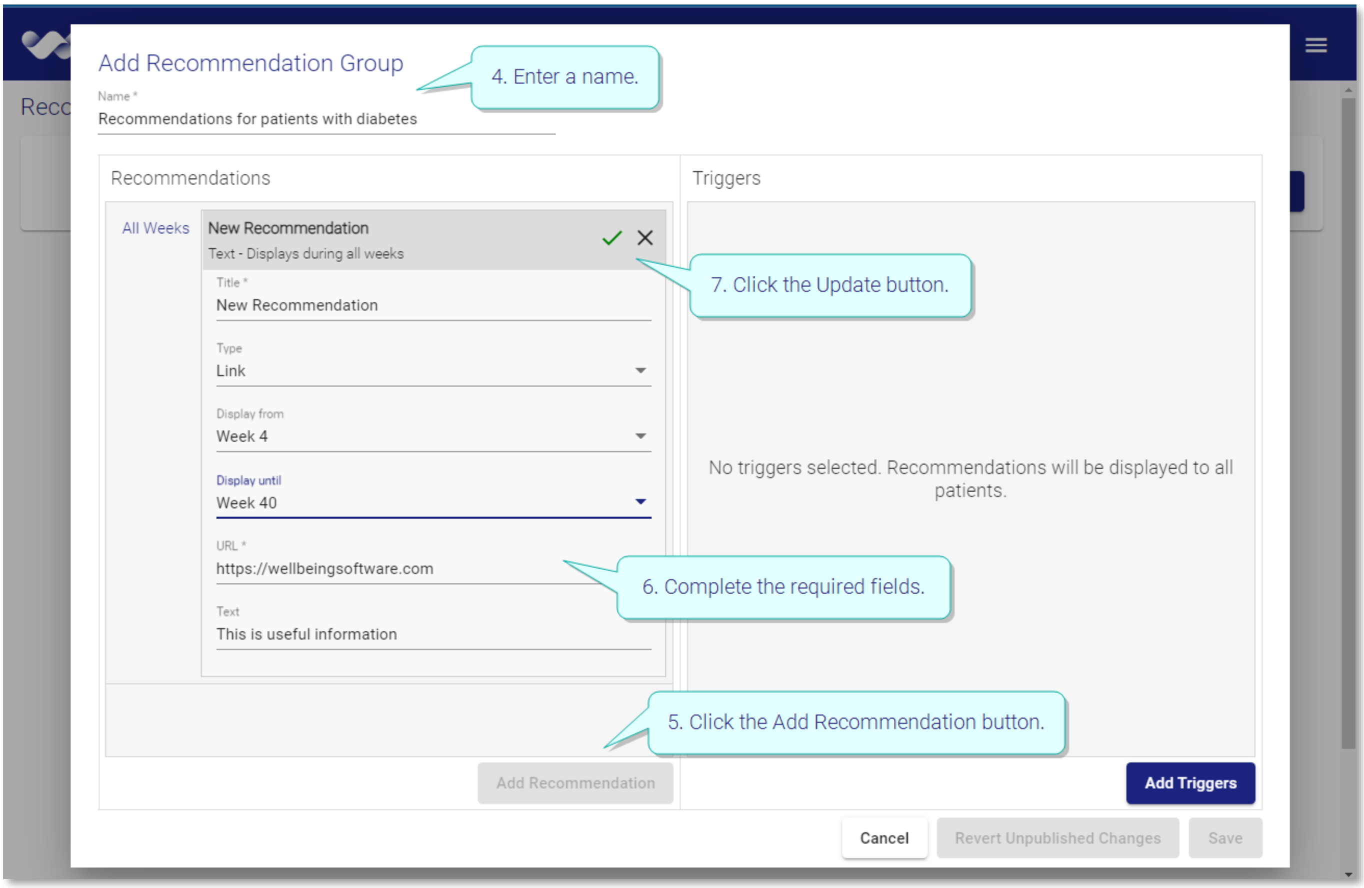


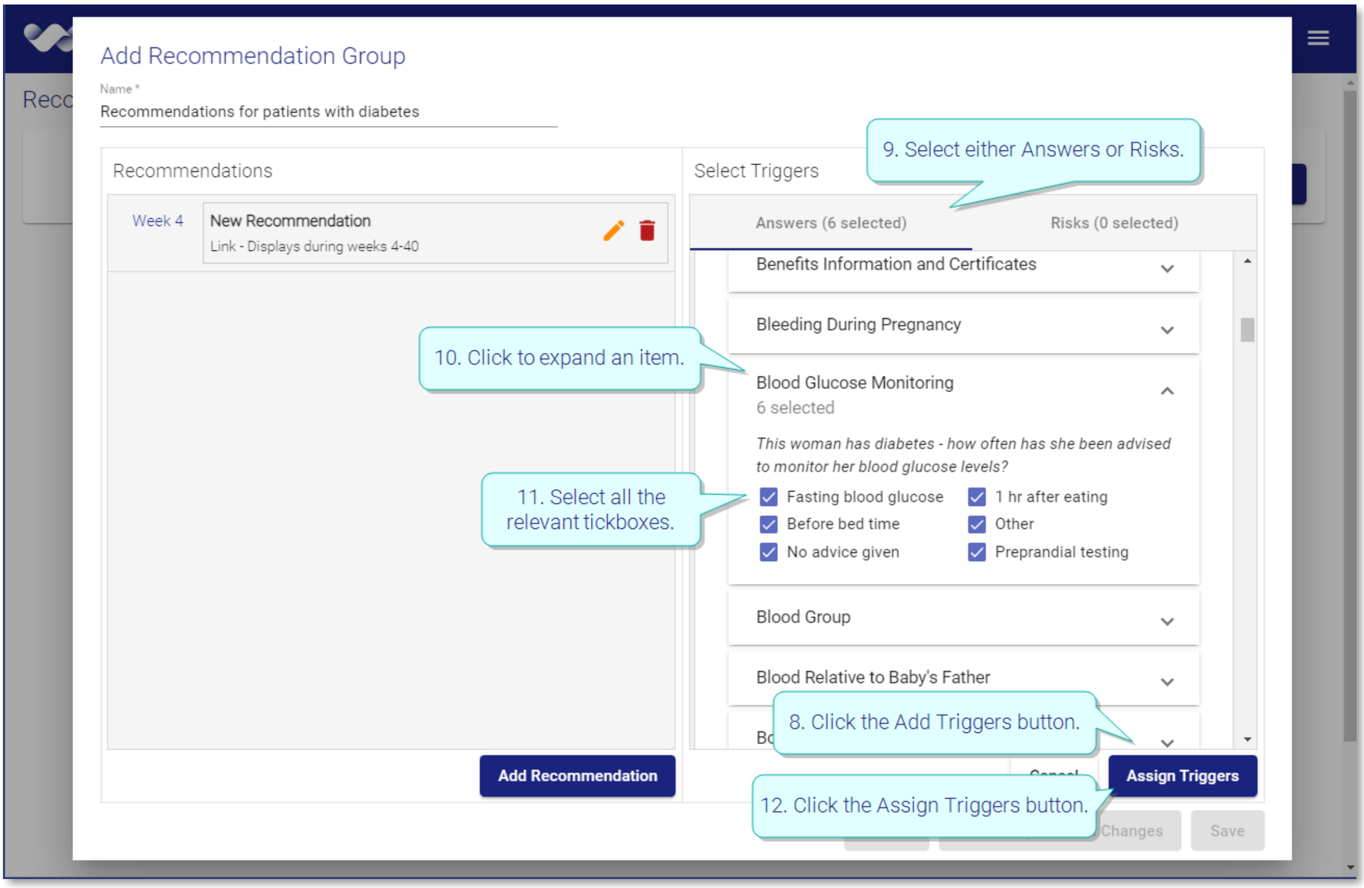
Recommendation Management

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

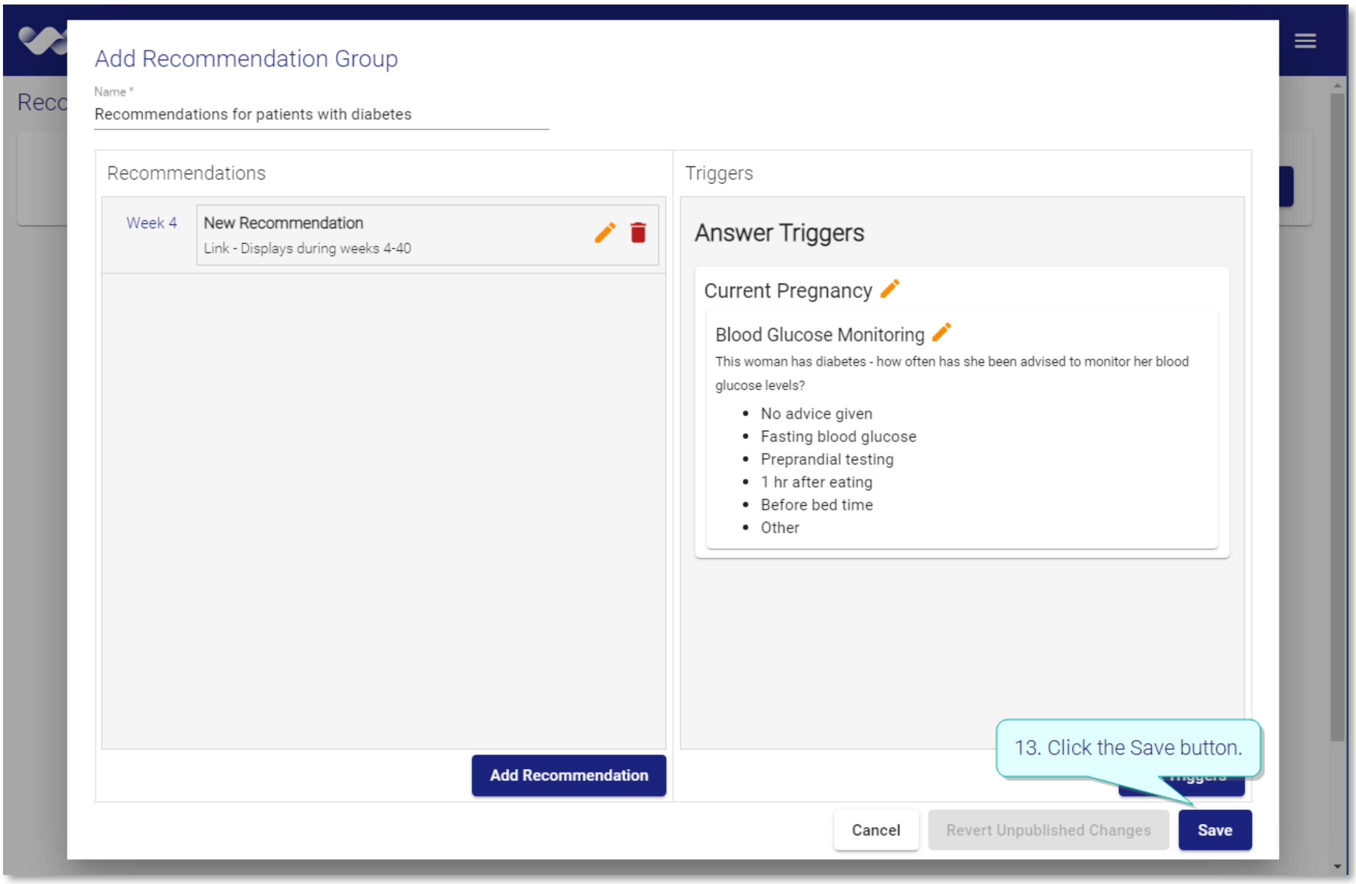
1. Click the **[Menu]** button to open the side pane.
2. Click **Recommendation management**.
3. Click the **[Add Recommendation Group]** button.
4. Enter a name.
5. Click the **[Add Recommendation]** button.
6. Complete the required fields.
7. Click the **[Update]** ✓ button.
8. Click the **[Add Triggers]** 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
4. Enter a name.
Name *
Recommendations for patients with diabetes
Recommendations
Triggers
All Weeks
New Recommendation
Text - Displays during all weeks
Title *
New Recommendation
7. Click the Update button.
Type
Link
Display from
Week 4
Display until
Week 40
No triggers selected. Recommendations will be displayed to all patients.
URL *
https://wellbeingsoftware.com
6. Complete the required fields.
Text
This is useful information
5. Click the Add Recommendation button.
Add Recommendation
Add Triggers
Cancel
Revert Unpublished Changes
Save


Add Recommendation Group
Name *
Recommendations for patients with diabetes
9. Select either Answers or Risks.
Recommendations
Select Triggers
Week 4
New Recommendation
Link - Displays during weeks 4-40
Answers (6 selected)
Risks (0 selected)
Benefits Information and Certificates
Bleeding During Pregnancy
10. Click to expand an item.
Blood Glucose Monitoring
6 selected
This woman has diabetes - how often has she been advised to monitor her blood glucose levels?
11. Select all the relevant tickboxes.
Fasting blood glucose
1 hr after eating
Before bed time
Other
No advice given
Preprandial testing
Blood Group
Blood Relative to Baby's Father
8. Click the Add Triggers button.
Add Recommendation
Assign Triggers
12. Click the Assign Triggers button.
Save

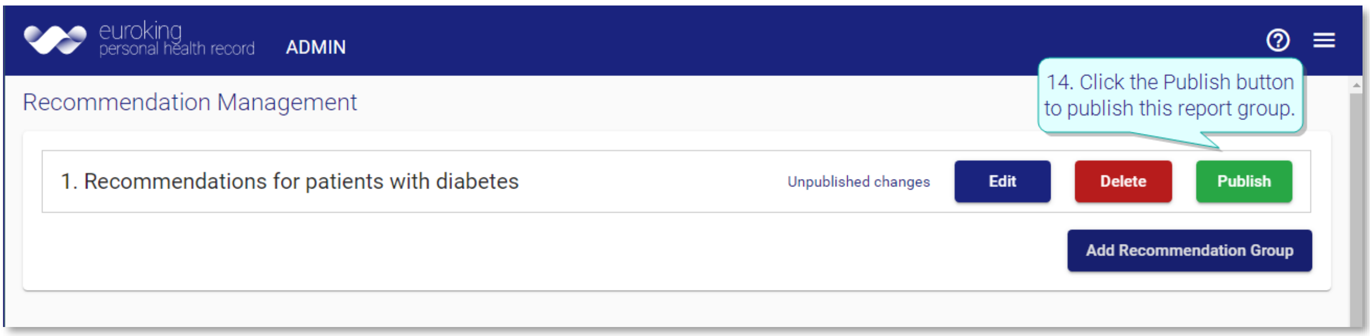
The selected recommendation text or link will be shown when the patient activates the selected triggers.

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.

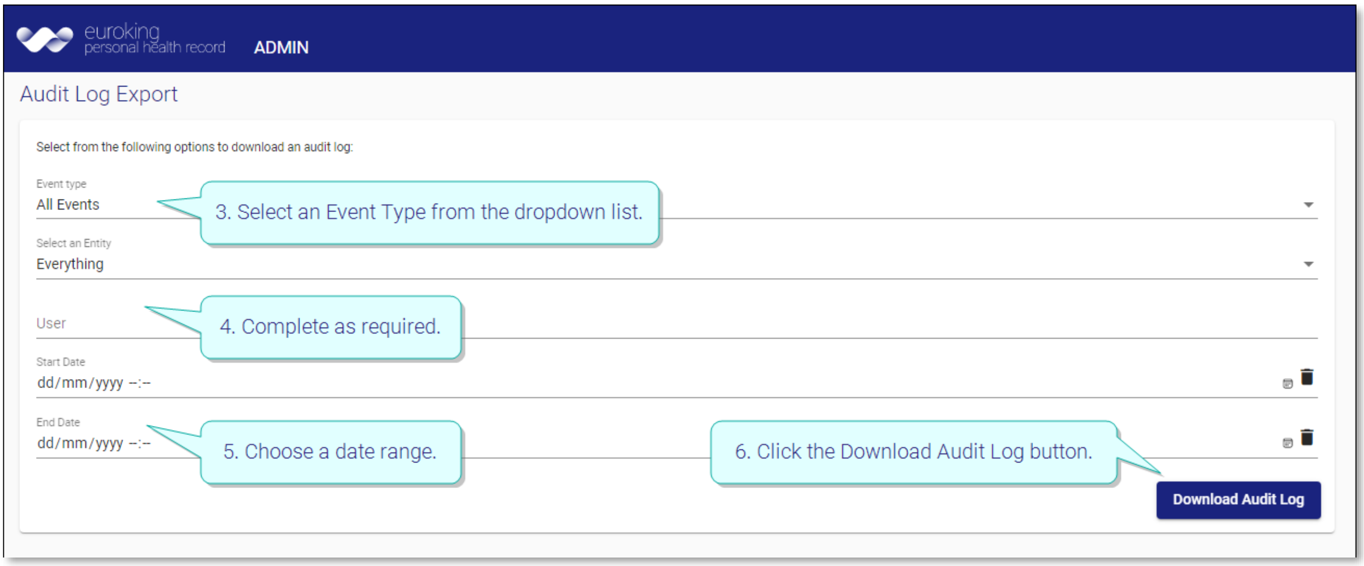
Tip:

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.



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.

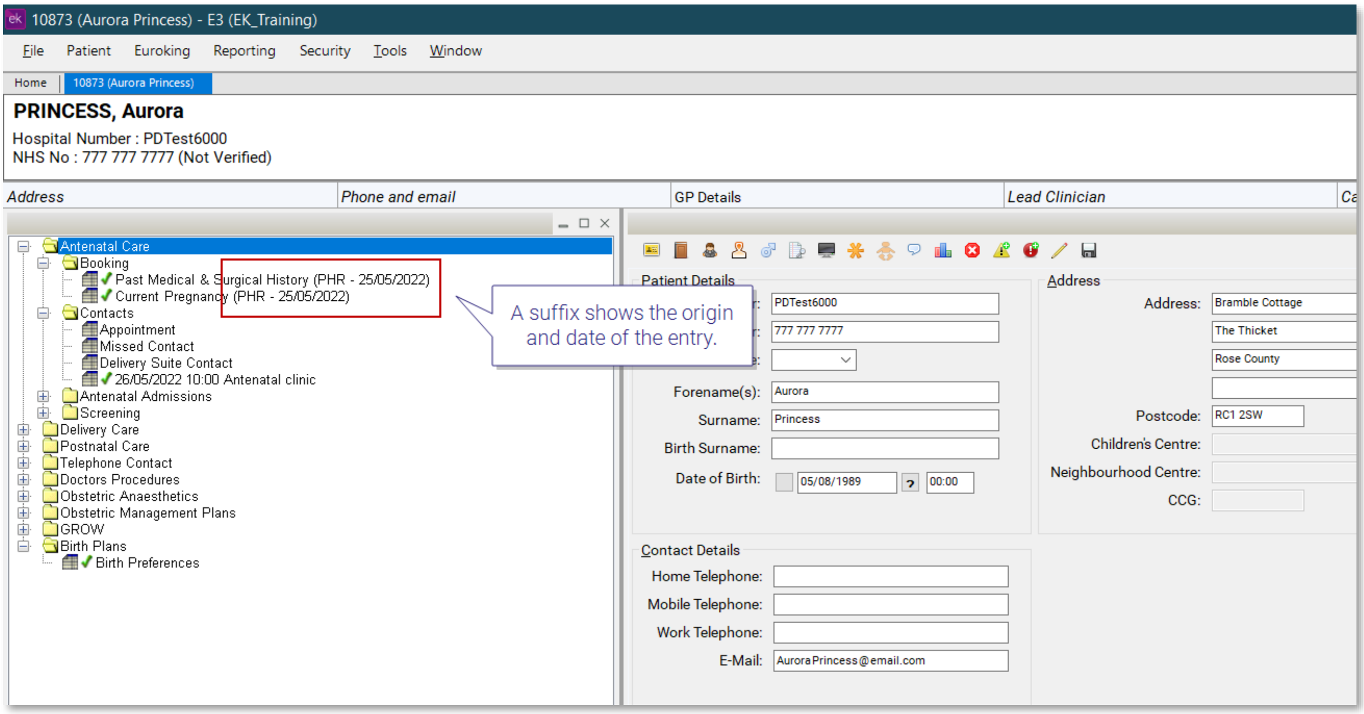
Changes to Report Groups

- 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	