

NHS & IBM What's The Plan User Manual



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Document Revisions

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1 Introduction

1.1 Scope and Purpose

What's The Plan is a result of the collaboration between UCL Computer Science and the NHS/Open Care Plan Community to create a mobile health platform that enables patients to manage their care plan. The project follows the manifesto of Electronic Health Records (EHR) by attempting to reduce costs and constraints for healthcare providers by reducing paper-based workflows and transitioning to electronic forms instead. The emphasis of the project is on the open care plan meaning it is interoperable with other healthcare systems. Reaching a safe and effective position with an open electronic care plan offers meaningful use to all practitioners and patients. The product is a working prototype of a mobile application that helps patients easily manage their care plans and other health records.

Below are six key features of the app:

- Patients can **manage** their **care plan** information
- Patients can **view** medical information about **surgeries, laboratory tests, diagnoses** and **allergies**.
- Patients can **view prescribed medications** and be **reminded** to take them when required.
- Patients can **make notes** from **consultations**.
- Patients can **view** and **add appointments** made with their doctor.
- Patients can **export** chosen medical information from the app as a **PDF**.

This User Manual will cover how to utilise all of these features effectively to benefit the user.

2 Registering & Logging In/Out

This section will cover how to **create** a **valid account** on the What's The Plan app, as well, as **logging in** and **out** successfully.

2.1 Registering an Account

1. Press “Or create an account” at the bottom of the Log In page.
2. Fill in the email and password sections and press the “Next” button.
3. Fill in your personal details, including Name, Gender, Date of Birth, Nationality and Marital Status, followed by “Next” again.
4. Lastly, enter your NHS Number, GP Name and GP Surgery before pressing the “Sign up” button.
5. Assuming you pass the validation checks on various input fields, your account should be created immediately and ready to be used from the app.

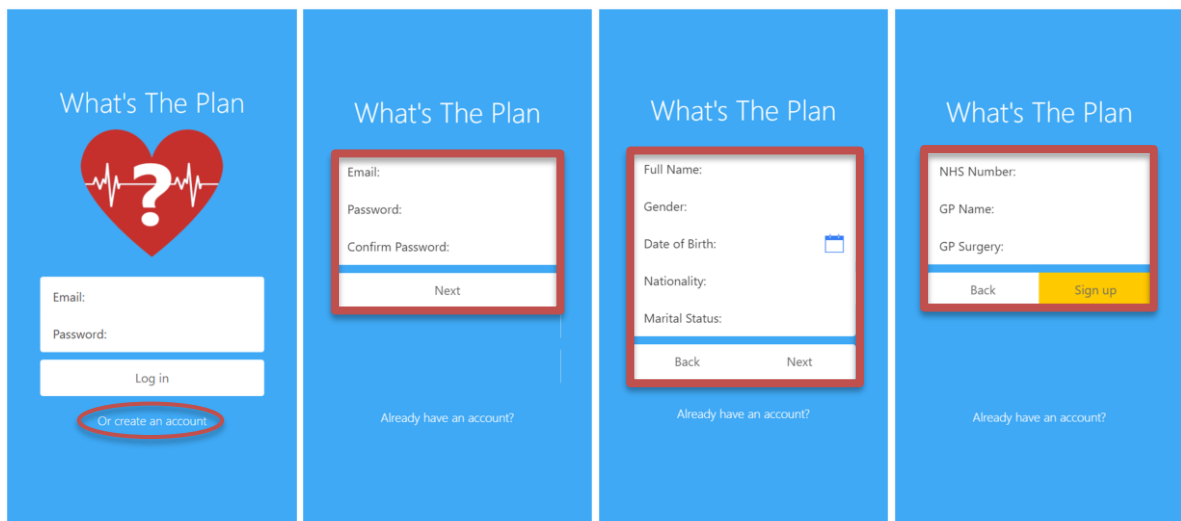


Figure 1 – Registering an Account Pages

➔ **NOTE: Ensure that you enter valid emails and passwords otherwise the validation checks will reject the inputs.**

2.2 Logging In with an account

This section will simply discuss how to **log into** the app after you have registered an account.

1. From the Log in page, enter the Email and Password you created your account with, and then Press “Log in”.
2. If the authentication was successful, you will be redirected to the Home Page of the app.

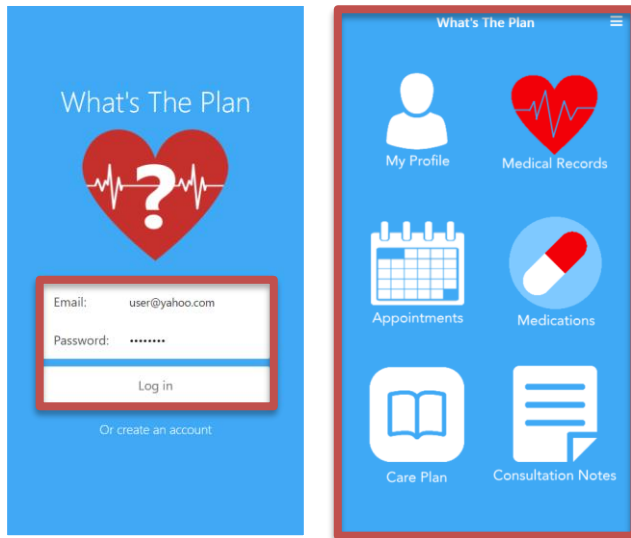


Figure 2 – Logging in

➡ **NOTE: Ensure that you enter a valid email and password otherwise the validation checks will reject the inputs and Logging In will be unsuccessful.**

2.3 Logging Out

This section will simply describe how to **log out** from the app.

1. Press the button on the top right of the page to open a Side Menu with two options on it.
2. Press “Logout” to successfully log out of the app and be redirected to the Log in page.

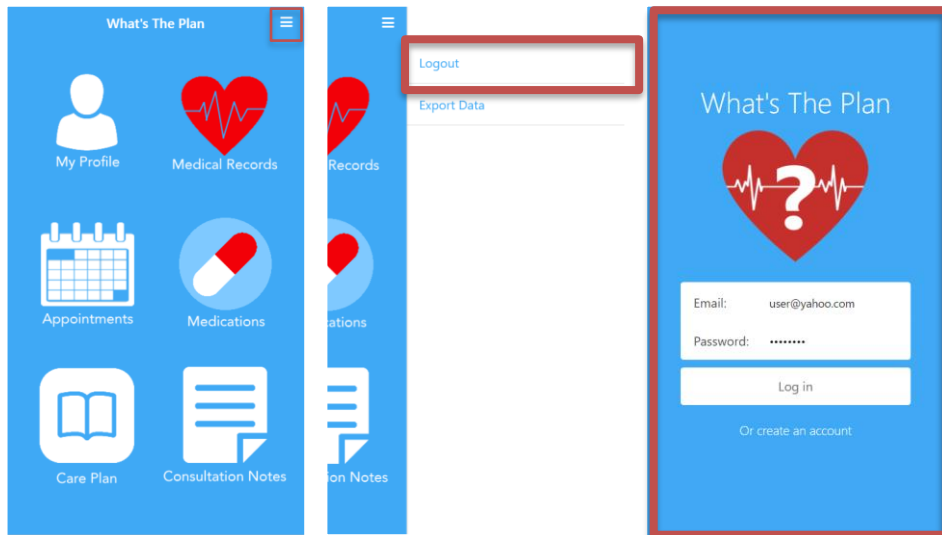


Figure 3 - Logging out

3 My Profile

This section will cover how to **view** your **User Profile**, which contains all your **personal details** that you registered with, and how to **edit** these details.

3.1 Viewing My Profile

1. Press the “My Profile” button from the Home Page.
2. From here you can see the details you registered with.

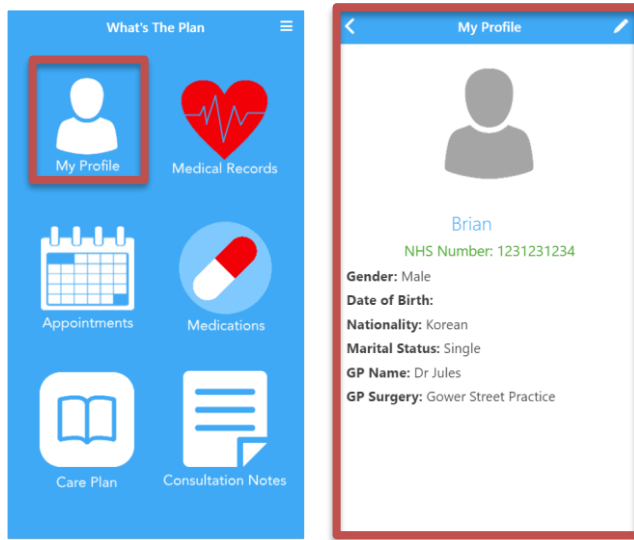


Figure 4 – Viewing My Profile

3.2 Editing My Profile

This section will cover how to **edit** your personal details on your **My Profile** page.

1. Touch the “Edit” button on the top right of the My Profile page.
2. Change any details about your Profile as you please, then touch the “SAVE CHANGES” button to finalise the changes.

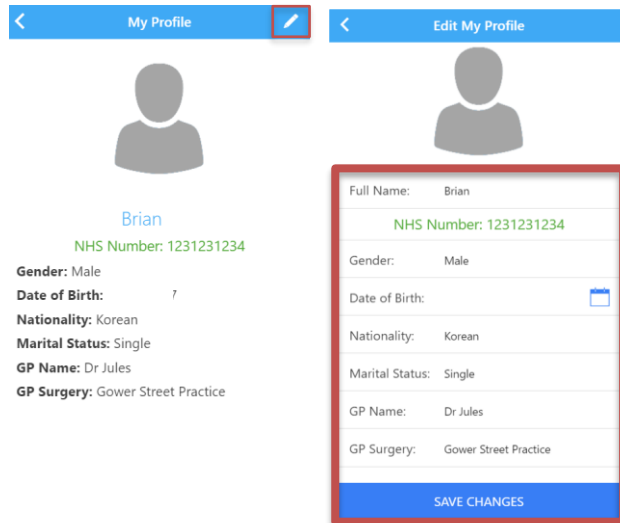


Figure 5 – Editing My Profile

4 Medical Records

This section will cover how to view your medical information about your surgeries, allergies, diagnoses, and laboratory tests. This data is defined as **read-only** so you will not be able to edit it. This data will be configured by your **GP** or another **clinician**.

4.1 Viewing Surgery Information

3. Press the “Medical Records” button from the Home Page.
4. On the Medical Records List, touch the “Surgeries” button.
5. Then select a Surgery from the list present, if any, to view more details about that surgery procedure.

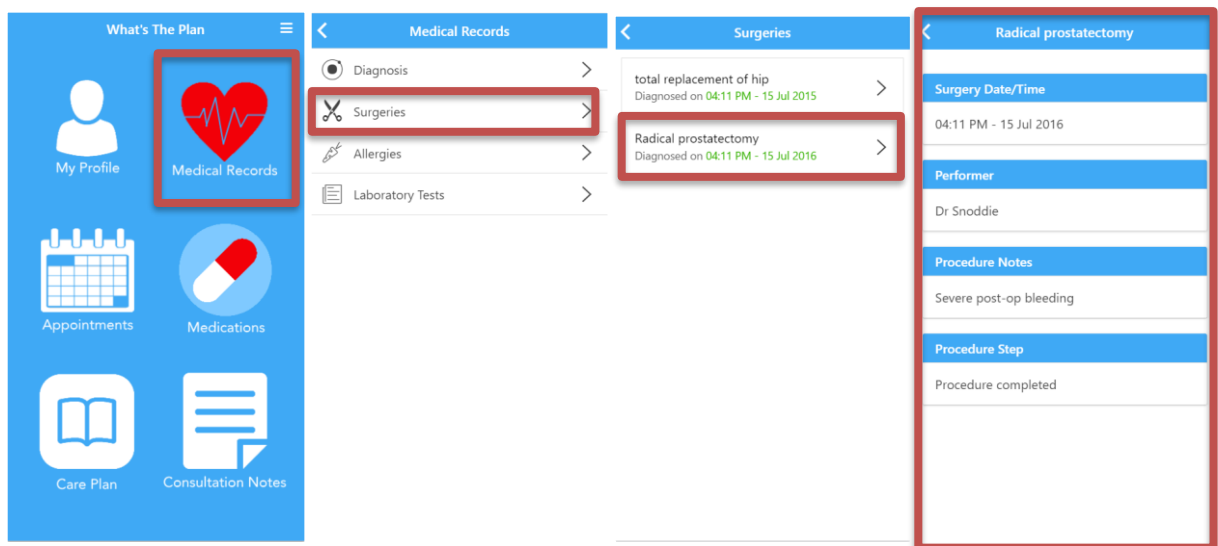


Figure 6 – Viewing Surgery Information

4.2 Viewing Diagnosis Information

1. Press the “Medical Records” button from the Home Page.
2. On the Medical Records List, touch the “Diagnosis” button.
3. Then select a Diagnosis from the list present, if any, to view more details about it.

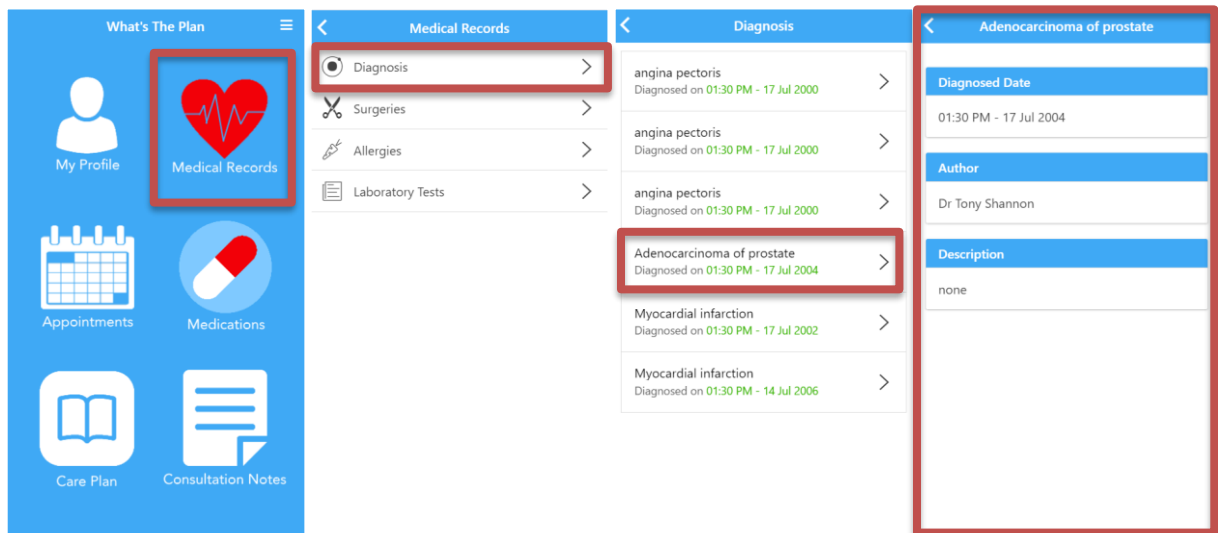


Figure 7 – Viewing Diagnosis Information

4.3 Viewing Allergy Information

1. Press the “Medical Records” button from the Home Page.
2. On the Medical Records List, touch the “Allergies” button.
3. Here you can view all your allergies from the list present, if any.

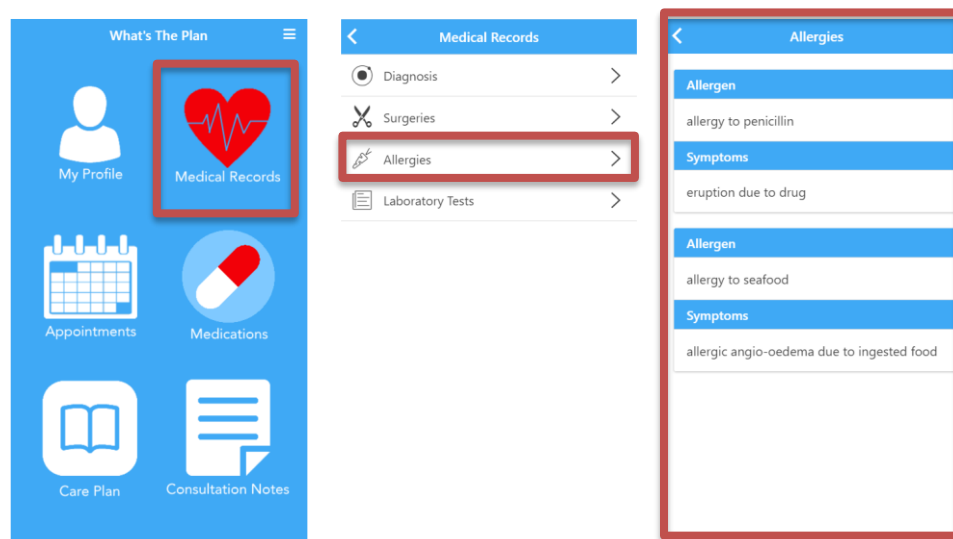


Figure 8 – Viewing Allergy Information

4.4 Viewing Laboratory Tests Information

1. Press the “Medical Records” button from the Home Page.
2. On the Medical Records List, touch the “Laboratory Tests” button.
3. Then select a Laboratory Test from the list present, if any, to view more details about it.

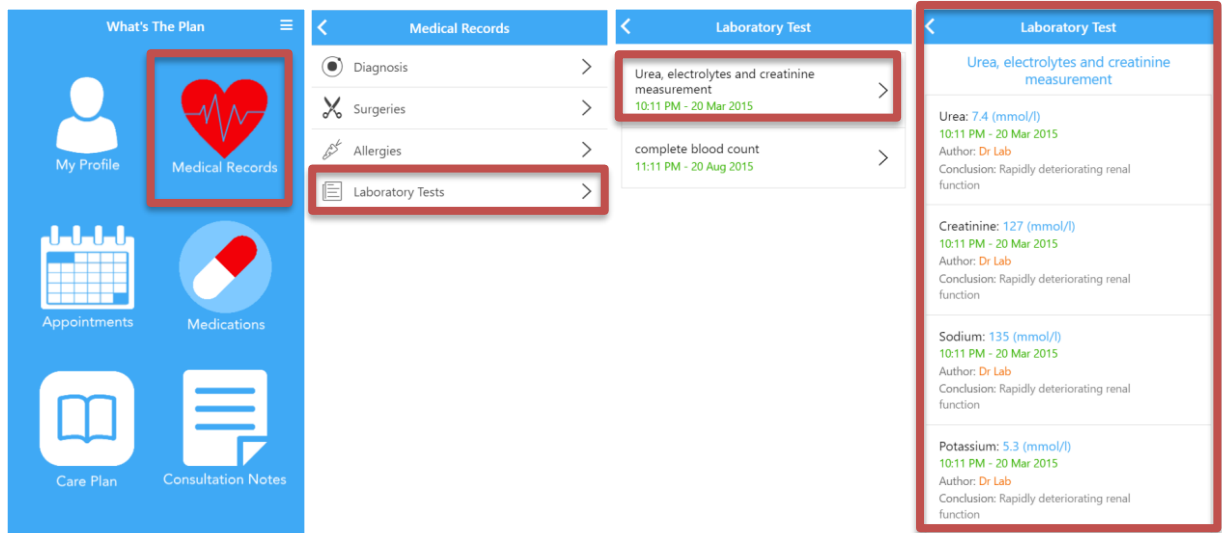


Figure 9 – Viewing Laboratory Tests Information

5 Appointments

This section will cover how to **view** and **add appointments** with your GP/consultant/clinician. Please remember that this feature is **not equivalent** to booking an appointment with your GP, instead it is for **keeping note** of all appointments you may have.

5.1 Viewing Appointments

1. Press the “Appointments” button from the Home Page.
2. From here, you can see the details for a list of all appointments you may have in the future.
3. Additionally, you can press the location icon on the on each appointment to see its geographical location.

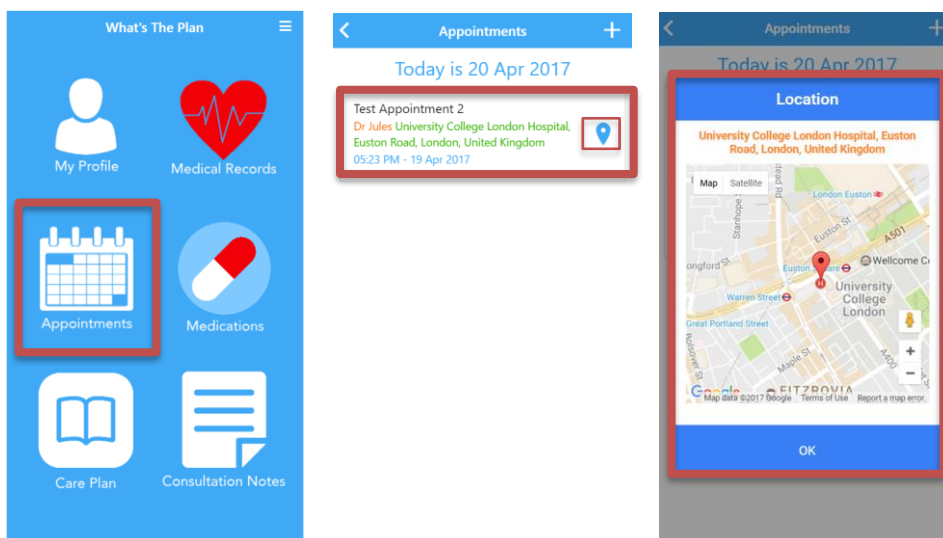


Figure 10 – Viewing Appointments

5.2 Adding Appointments

1. Press the “Appointments” button from the Home Page.
2. From here, you can see the details for a list of all appointments you may have in the future.
3. To add an appointment, press the “Plus” or “+” icon on the top right of the page.
4. Fill in the details of your next appointment, and then press the “ADD APPOINTMENT” button at the bottom to confirm.

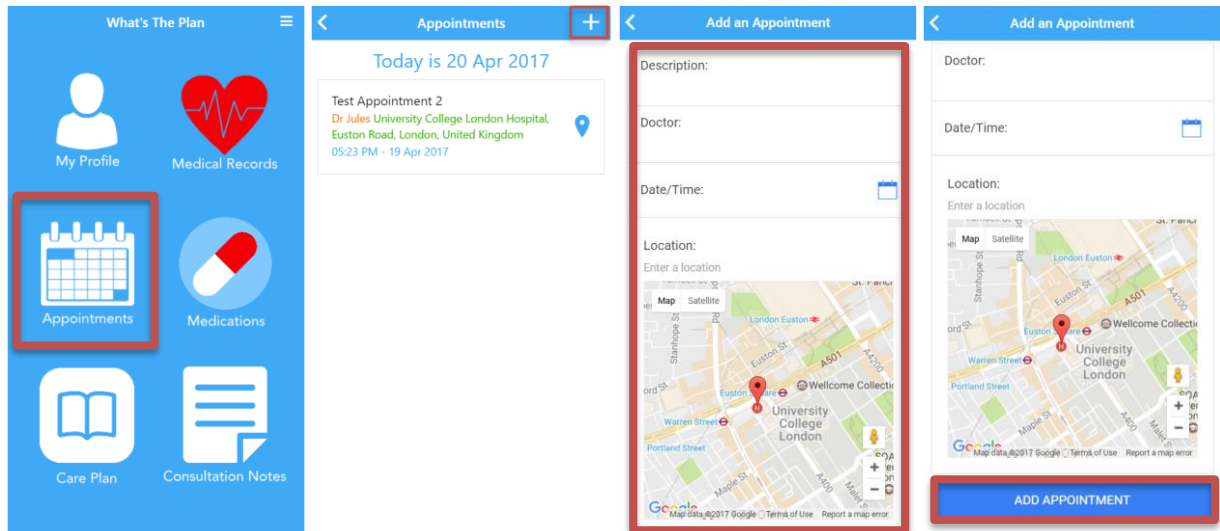


Figure 11 – Adding Appointments

6 Medications

This section will cover how to **view** your **prescribed medications**. Additionally, this section will look at how to **view** and **add** medications on the What's The Plan's **medication reminder system**.

6.1 Viewing Prescribed Medications

1. Press the “Medications” button from the Home Page.
2. After that, press the “My Prescribed Medications” button from the next page to view a list of all your prescribed medications.
3. Then select a medication from the list present, if any, to view more details about it.

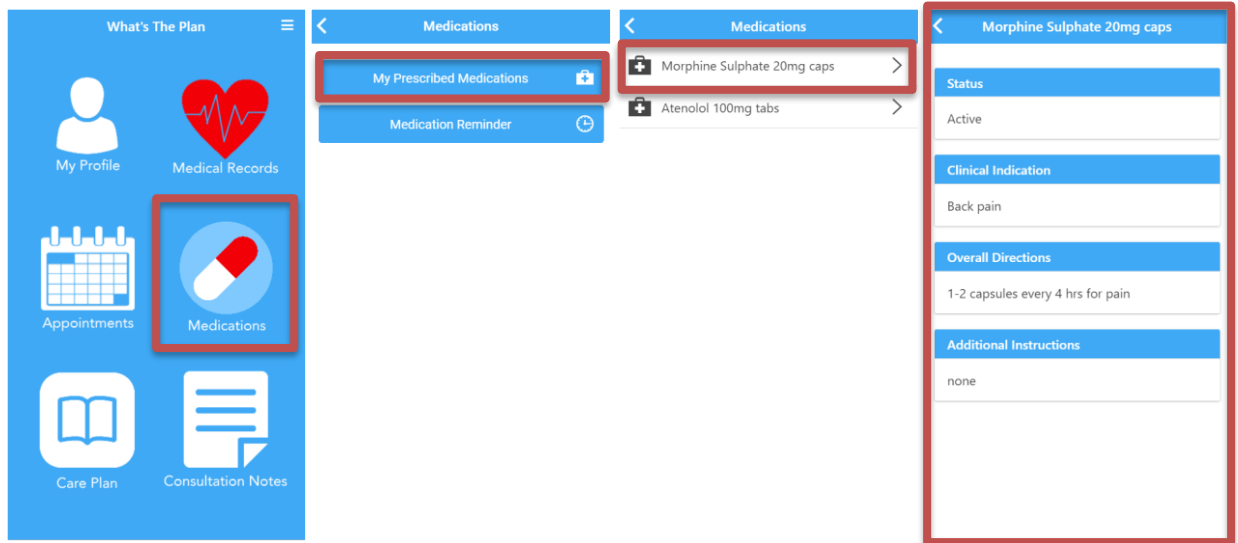


Figure 12 – Viewing Prescribed Medications

6.2 Viewing Medications on Reminder System

1. Press the “Medications” button from the Home Page.
2. After that, press the “Medication Reminder” button from the next page to view a list of all your medications that are on the app’s reminder system.

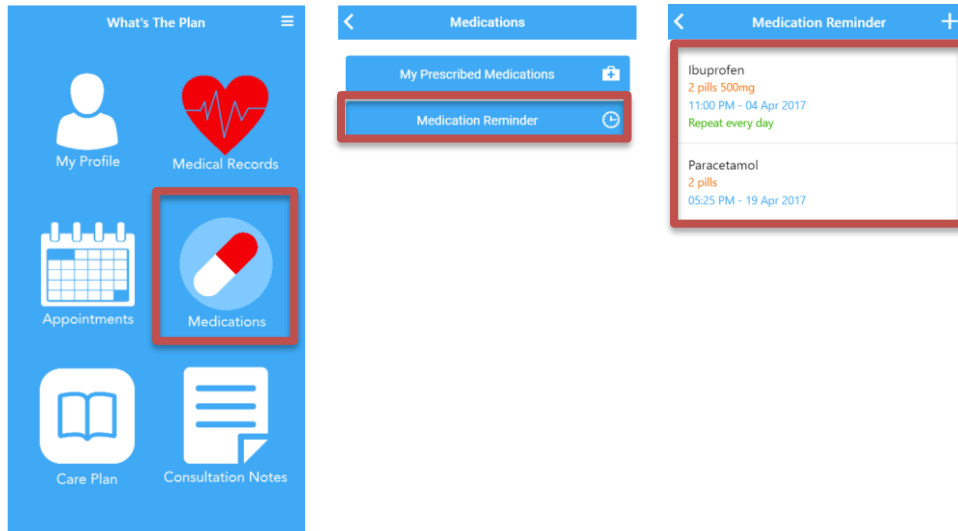


Figure 13 – Viewing Medications on Reminder System

6.3 Adding Medications to Reminder System

1. Press the “Medications” button from the Home Page.
2. After that, press the “Medication Reminder” button from the next page to view a list of all your medications that are on the app’s reminder system.
3. To add a medication to the system, press the “+” icon on the top right of the page.
4. Fill in the details, and then press the “ADD REMINDER” button to confirm.

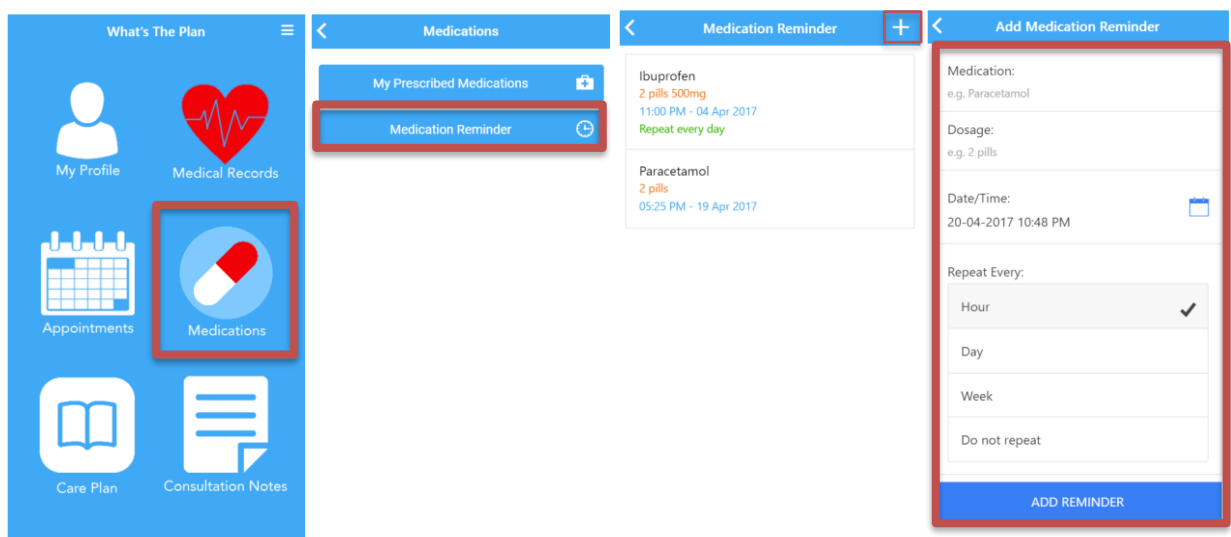


Figure 14 – Adding Medications to the Medication Reminder System

7 Care Plan & Care Team

This section will cover how to **view** and **edit** your **care plan**. In addition, it will look at how to **view** details about the **members** of your **care team**, and how to **edit** and **add** more members.

7.1 Viewing Your Care Plan

1. Press the “Care Plan” button from the Home Page.
2. After that, press the “Care Plan” button from the next page to view your Care Plan.

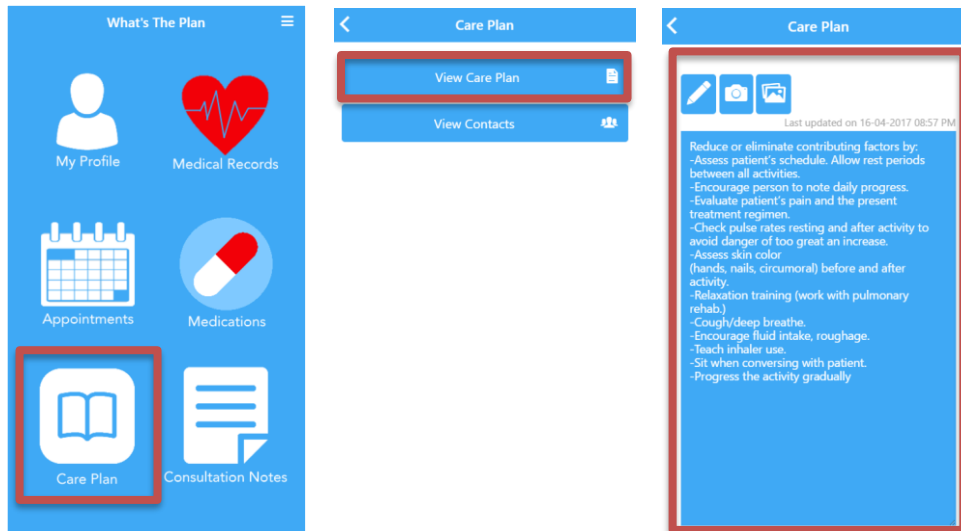


Figure 15 – Viewing your Care Plan

7.2 Adding/Editing Your Care Plan

1. Press the “Care Plan” button from the Home Page.
2. After that, press the “Care Plan” button from the next page to view your Care Plan.
3. Then press the “Edit”, “Camera” or “Gallery” buttons to add text, camera pictures, or gallery pictures to your care plan.
4. After completing the edit, press the “SAVE CHANGES” button at the bottom to confirm.

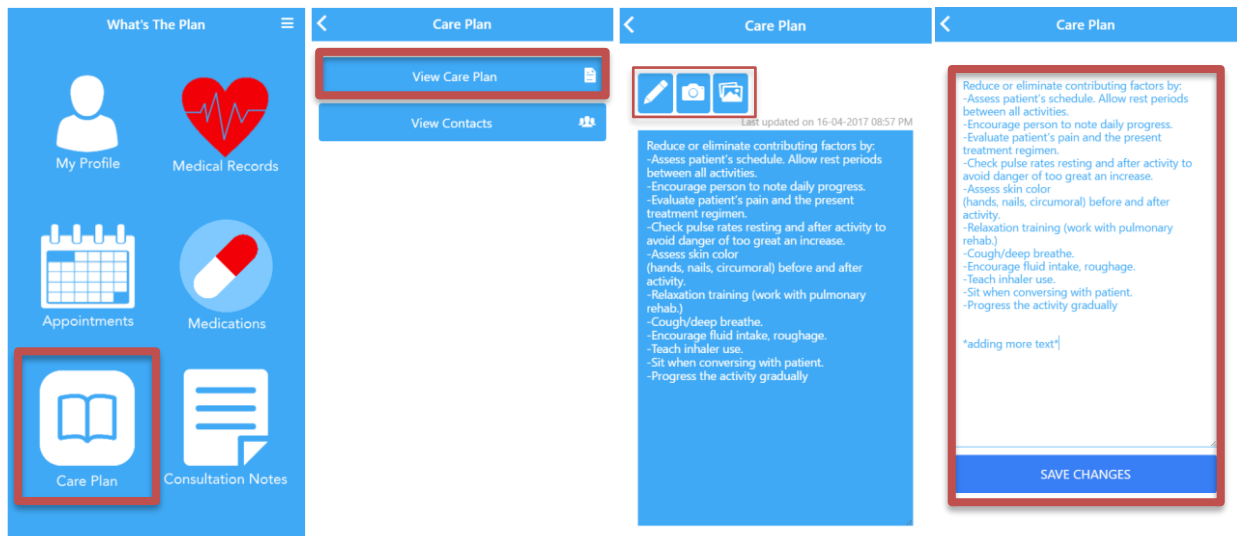


Figure 16 – Adding/Editing your Care Plan

7.3 Viewing Care Team Information

1. Press the “Care Plan” button from the Home Page.
2. After that, press the “View Contacts” button from the next page to view a list of your Care Team members.
3. To view more details about an individual, simply press the “>” near their name.

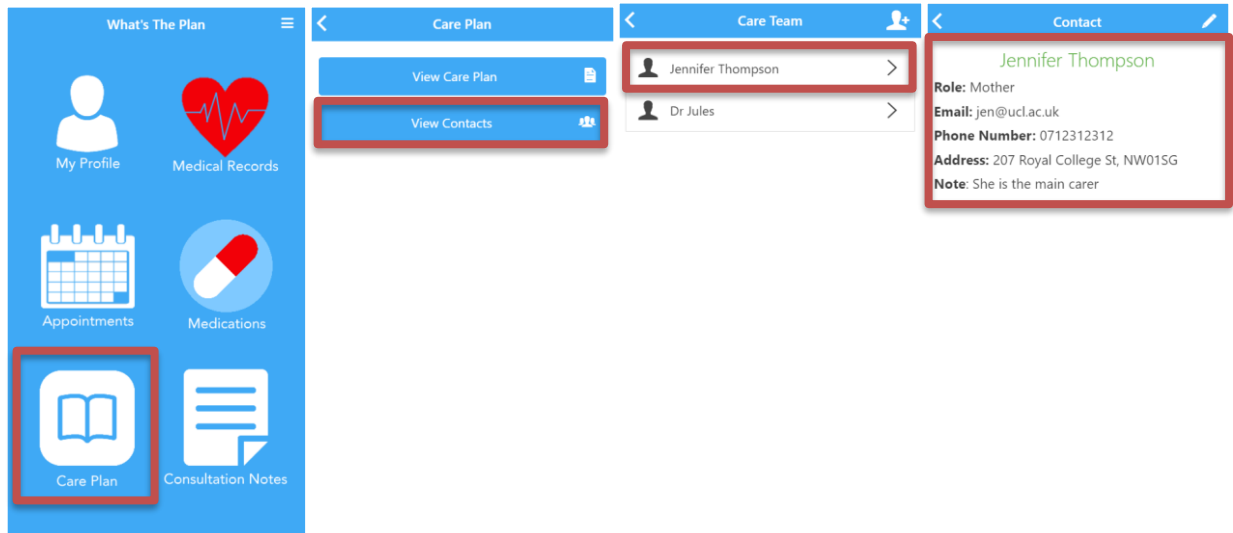


Figure 17 – Viewing your Care Team

7.4 Editing Care Team Member Information

1. Press the “>” near the name of the individual you would like to edit.
2. Then press the “Edit” button on the top right to edit the details about this member of your care team. When finished, press “SAVE CHANGES” to confirm.

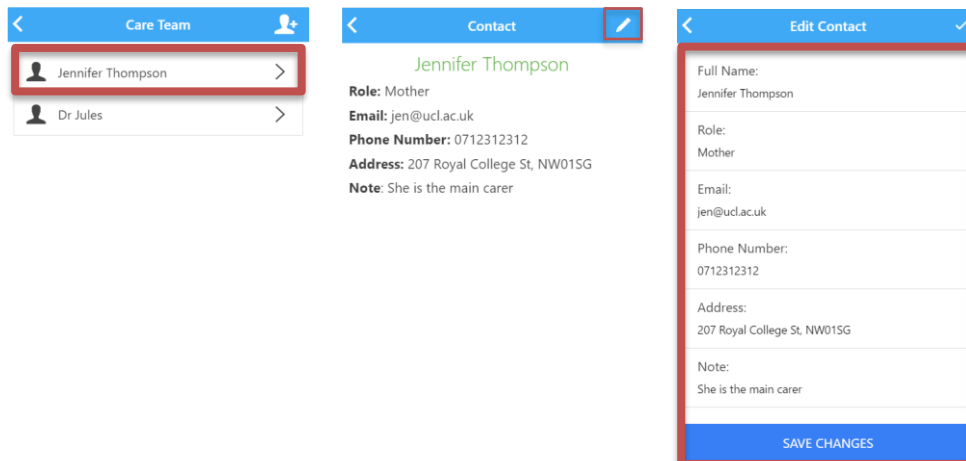


Figure 18 – Editing a Care Team member

7.5 Adding Care Team Members

1. Press the “Care Plan” button from the Home Page.
2. After that, press the “View Contacts” button from the next page to view a list of your Care Team members.
3. Then press the “Add Contact” button on the top right of the page.
4. Fill in all the details about the new member of the Care Team and press “ADD CONTACT” to confirm.

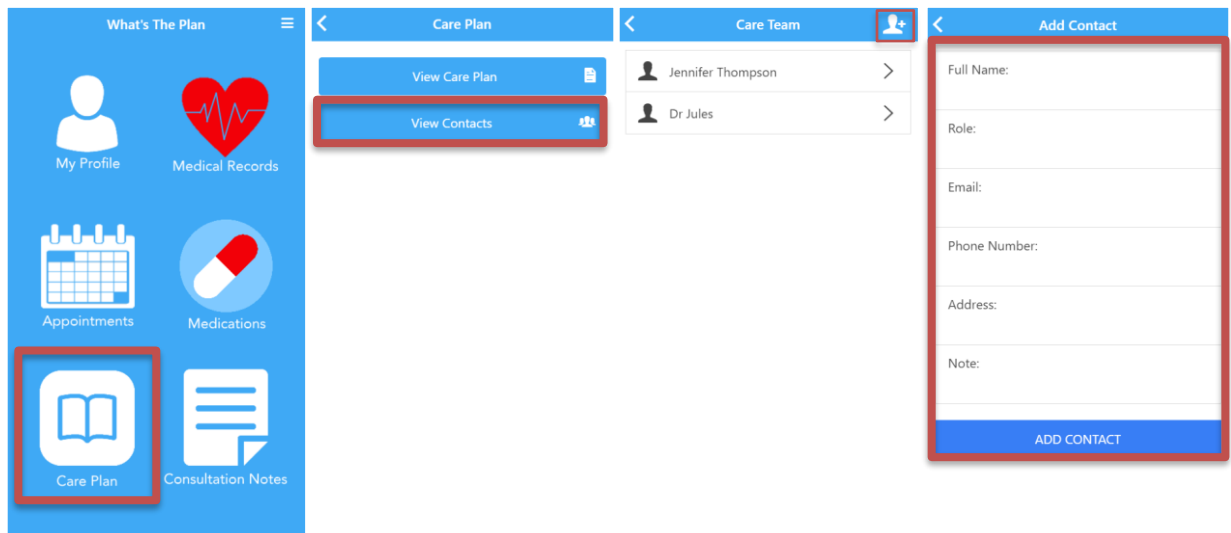


Figure 19 – Adding a member to your Care Team

8 Consultation Notes

This section will cover how to **view**, **edit** and **add consultation notes** made with your **GP** or **clinician**.

8.1 Viewing Consultation Notes

1. Press the “Consultation Notes” button from the Home Page.
2. Then you will see a list of Consultation Notes you have made previously. To see one in more detail, simply press the “>” button.

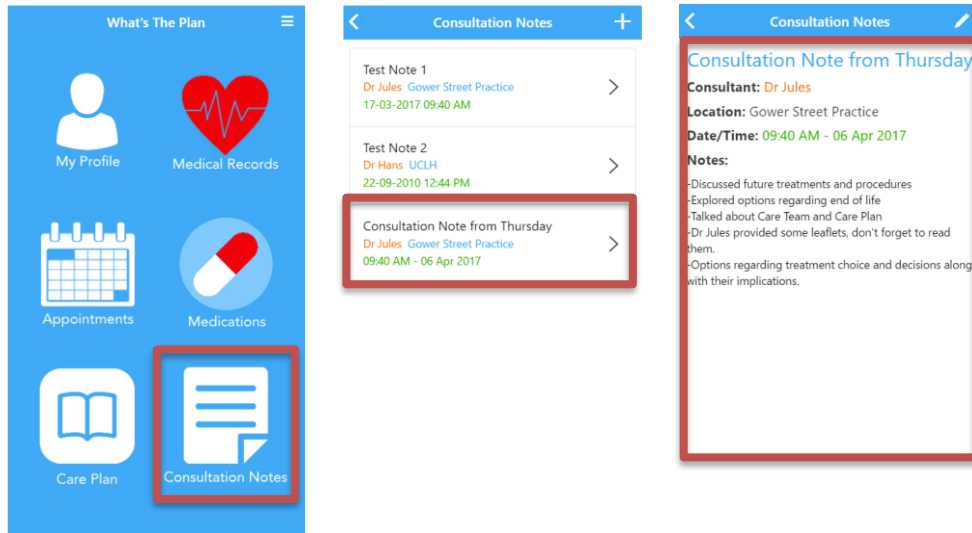


Figure 20 – Viewing Consultation Notes

8.2 Editing Consultation Notes

1. Press the “Consultation Notes” button from the Home Page.
2. Then you will see a list of Consultation Notes you have made previously. Simply press the “>” button to expand the Note.
3. Lastly, press the “Edit” button on the top right to edit the Consultation Note.
4. After making changes, press “SAVE CHANGES” button to confirm.

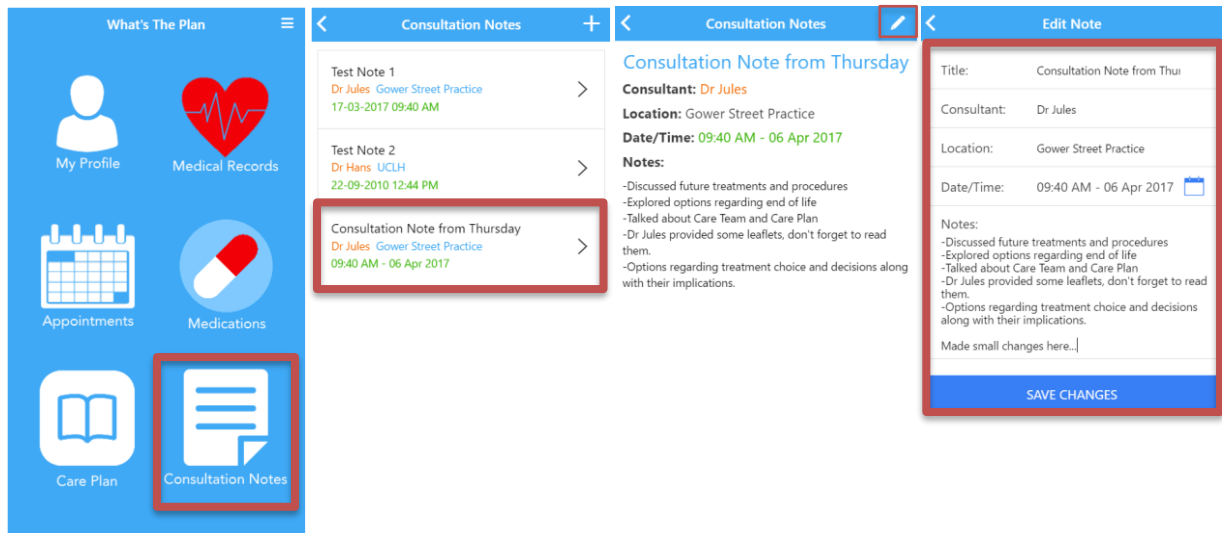


Figure 21 – Editing Consultation Notes

8.3 Adding Consultation Notes

1. Press the “Consultation Notes” button from the Home Page.
2. Then press the “+” icon on the top right of the page to create a new Consultation Note. When finished, press the “ADD NOTE” button to confirm.

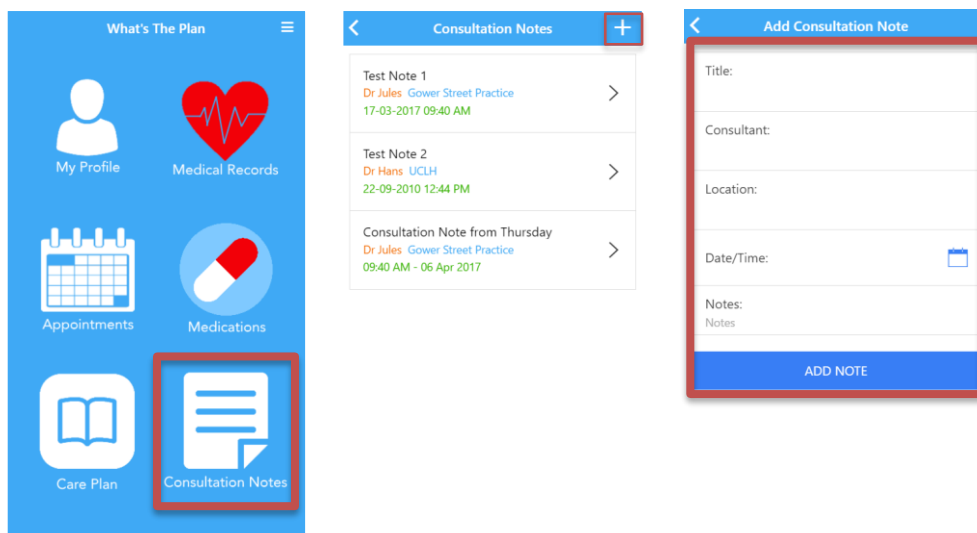


Figure 22 – Adding Consultation Notes

9 Export to PDF

This section will look at how to **Export Data** from the What's The Plan app as a **PDF** document.

9.1 Export to PDF

1. Press the button on the top right of the home page to open a Side Menu with two options on it.
2. Touch the “Export Data” option to open a new page where you are able to choose which data to Export to a PDF from the What's The Plan app.
3. When you have chosen what to export, press the “EXPORT” button to confirm.

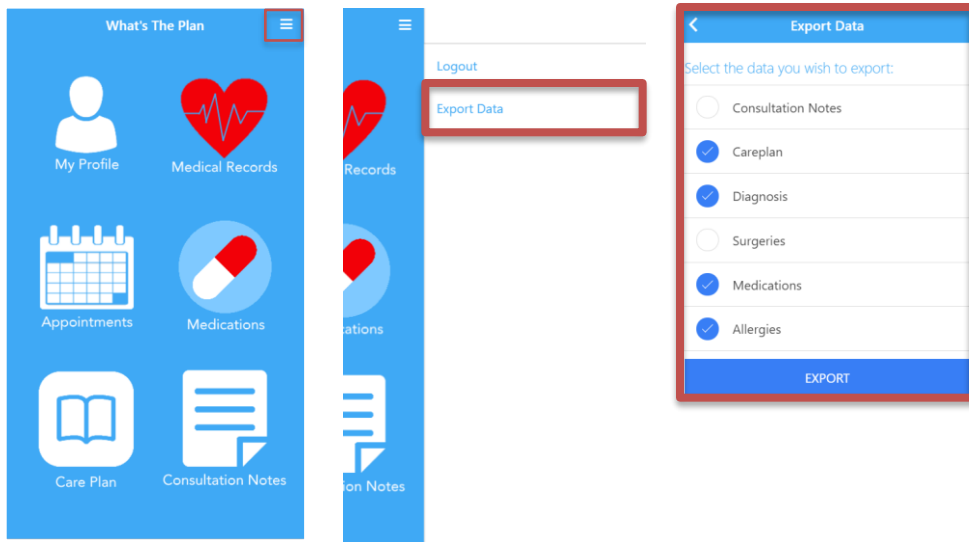


Figure 23 – Exporting to PDF