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| 190 Elizabeth St. Toronto, ON M5G2C4 |  | p. 647-926-9724 (Tech support) |  | medlysupport@ehealthinnovcation.org |

CHF Medly - Operations

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# Background Information

* Use UHN email to email the clinicians (not the eHealth email)
* Kits stored in the clinic (Fellow Room)
  + Passcode: 524; Need the key for the filing cabinet
  + Kits are numerically labelled
* Head: Dr. Heather Ross
  + Heather’s nurses: Nadia Thomson + Meredith
  + 2-week shifts (clinic vs. patient-ward)
* Communication:
  + Between clinic and technical support goes through Iqra (Technical Coordinator)
    - [iqra.ashfaq@uhn.ca](mailto:iqra.ashfaq@uhn.ca)
    - [medlysupport@ehealthinnovation.org](mailto:medlysupport@ehealthinnovation.org)
    - 647-926-9724
* Testing Account:
  + Username: test1234
  + Password: test1234

# Inventory

## Documentation:

1. Type in the phone numbers into Assets2 spreadsheet under notes
2. Enter Serial Number, Asset Tag and Notes (phone number)

* Use barcode to scan serial number: IMEI
* Check as text file
* Save as csv file

1. Go to SNIPE IT - Assets > import > select import file
2. Hit Process (For the entire file)
3. Check if all phones went through (ex. Type Medly 081 to see if all info pulls up)

## Setting up the Medly phones

1. Insert SIM card
2. Place Medly skin on the phones
3. Complete initial set up
4. Email address: [medlyprogram@gmail.com](mailto:medlyprogram@gmail.com); Password: MedlyProgramGmailAccount
5. Setting up payment info: “No, thanks”
6. Phone password: use ‘123456’
7. Get airwatch device activation codes (from Mark via email)
8. Download airwatch
   * Set up airwatch by scanning barcode in the email (verify the Medly username is accurate)
9. Verify if Airwatch Samsung ELM Service and Medly automatically downloaded
10. Verify Medly application version number is the most updated
    * Apps > Agent > Managed Apps > [verify version #]
11. Move Medly app to the homepage
12. Change Display settings:

* Apps > Settings > Display > Screen timeout > 10 minutes

1. Change Lock screen settings:

* Apps > Settings > Lock screen and security > Secure lock settings > Lock automatically > 10 minutes

## Creating Medly Kits:

1. Gather all the equipment: Medly phones, BP cuffs, weight scales, Medly manuals & Medly bag
   * Try to use the same BP cuff code and weight scale code for the same kit (e.g., BPL203 & WSL203 in the same kit)
2. Fill out Medly Manual:

* For tech support, contact: [fill in your name here, and date/time available]
  + E.g., contact: Iqra Ashfaq, M-F; 8-4pm
  + Clinic Phone number: 416-340-4800
    - Nadia: x 8499
    - Meredith: x 3773
* Medly Kit #:
* Your Phone Number: [labelled on the box]
* Your Phone Password: 123456
* Medly User: Medly0#
* Medly Password: medly0#

1. Pair Medly phone with weight scale and BP cuff

* Weight Scale: Apps > Settings > Bluetooth > Turn Bluetooth On > Hold down black button on back on the scale until you see “PR” > Click Scan at the top right corner (Medly phone) > Select “A&D\_UC-etc.”
* BP Cuff: Apps > Settings > Bluetooth > Turn Bluetooth On > Hold down the power button until you see “PR” > Click Scan at the top right corner (Medly phone) > Select “A&D\_UA-etc.”

1. Test Medly app:

* Open Medly app > username: test1234, password: test1234 > Take your weight & BP and verify if the data syncs
* Enter your symptoms and verify that an alert generates on the phone and on dashboard, and verify if an email alert is generated (if needed)

1. Clear Phone

* Apps > Settings > Accounts > Medly > More (right corner) > Remove Account
* Apps > Settings > Applications > Application Manager > Medly > Clear Data

1. Log back into the test account (you will use the test account of the training session)

* Open Medly app > username: test1234, password: test1234

1. Record inventory data in spreadsheet called “Copy of Medly Patient Kit\_SWYH updated”’

* Fill in the following columns: Patient Name; Condition; QR Code; Patient ID; Password; Phone Number; Smartphone ID; IMEI; BP Cuff ID; Weight Scale ID
  + Write “R” under patient name (this will update the # of kits that are ‘ready’ to be deployed)
  + Phone number: found on the phone’s box

1. Put all equipment into a Medly bag (+ the manual) and label the kit # using a post-it

# On-Boarding Protocol

**Before patient arrives:**

1. Set-up account on dashboard (Enter dummy info – update after patient leaves)

* *[Got to patient tab > Add new patient]*
  + MRN: 16161616
  + First name: e.g., zzPatientSixteen
  + Last name: e.g., zzPatient Sixteen
    - *Use “zz” in front of the name to separate test accounts from patient accounts*
  + DOB: [use current date account was set up]
  + Phone Number: 1616161616
  + Clinic: Heart Function
* [Next page]:
  + Email: blank
  + Username: Medly0#
    - # = the same as the kit number OR if the kit is being recycled, use kit # + A, B, or C etc.
      * E.g., Medly016A = Kit #1, A indicates that this kit is being used for the second time
      * E.g., Medly02F = Kit #2, F indicates that this kit is being used for the 7th time
  + Password: medly0#
    - Exact same as the username (with NO caps)
* [Next page - can be updated after onboarding by going to profile]:
  + Condition: CHF
* Add Caregiver
  + *[Go to patient > care team tab > edit care team > add Dr. Ross]*

1. Set up the phone

* Make sure phone is charged
* Verify the kit # is the same on the phone’s box
* Store the box

**When Patient Arrives:**

1. Make sure Medly on-boarding slip is signed by Most Responsible Person (MRP) or designate signs off on form before we arrive

* Note names of MRPs (as of Nov 22, 2016):

1. Heather Ross
2. Diego Delgado
3. Phyllis Billia
4. Mike McDonald
5. Nadia Thomson
6. Meredith Linghorne
7. Verify Eligibility for RCT

* **MUST:**
  + NYHA Class: must be 2, 3 or 4
  + Ejection fraction: must be less than 40%
  + Enrolled in HF clinic: for at least 6 months
  + Age: 18 years old +
  + Speaks/understands English
* **Must NOT:** 
  + Be on mechanical circulatory support
  + Be on the heart transplant list
  + Have a terminal diagnosis with life expectancy of less than 1 year
  + Have dementia or uncontrolled psychiatry illness
  + Be a resident of a long-term care facility

1. RCT vs. Program:

* If eligible for RCT, patient joins the RCT
* If not eligible for RCT, patient joins the program

**STUDY:**

1. Choose the appropriate participant ID (i.e., RCT or program):

* Write the date next to the participant ID
* Write participant ID on both questionnaires

1. Introduce Medly

* *“Have you heard of Medly? Medly is a smartphone app designed to help you manage your chronic condition by monitoring symptoms, tracking important measurements and providing self-care guidance. You will receive feedback once you input your measures. Goal of Medly: help you better understand your condition, guide self-improvement and enhance communication with your health care team. It is not intended to replace your current care, but to supplement it with additional support.”*

1. Go over the screener
2. Go over consent form (both program and study) and get patient to sign 2 copies

* One copy for us, one copy for them to take

1. Inform study participants about randomization and why we do it (fold paper once done).

* *“This is a randomized controlled study, meaning we have two groups. One group will receive regular care (e.g., normal visits to the doctors and following what your doctor says) and in addition to the regular care, the second group will also receive access to the Medly application to track their vitals.”*
* *“We will decide what group you are in by randomly choosing from a slip in an envelope. Inside the envelope it will say either control (meaning you will just continue with regular care) or Medly (meaning in addition to your regular care, you will receive the Medly application to track your vitals)”* 
  + If control slip: *“Unfortunately you will not receive the Medly application. However, your physician may be interested in giving this kit to all their patients, so you may have a chance to use it after the 6 months study is complete!”*

1. Reimbursement: Write a cheque for $24 (make sure cheque number matches cheque form)

* Get participant to sign form

1. Questionnaires:

* *“I am sending you home with two questionnaires*. *Please answer all questions to the best of your ability and write the date that you completed it. Please complete the first questionnaire within the next 24 hours and completed the second questionnaire after 1-month. If we do not receive it in time, we may reach out to contact you. The envelopes are both pre-paid and labelled with the address”*
* Make sure ID is on both questionnaires
  + *“Please do NOT write your name on the questionnaires, so we can keep your identity confidential”*
* Label the follow-up questionnaire’s envelope with “1-month follow-up” and write what date that questionnaire needs to be competed

1. Introducing the manual
   1. Tech support: [medlysupport@ehealthinnovation.org](mailto:medlysupport@ehealthinnovation.org) or 647-926-9724 (M-F 8am-4pm)
   * *“You should NOT call the clinic for tech issues”*
   1. Clinic Phone Number
   * You should NOT call tech support for clinical inquiries. “*I have provided you with TGH’s number and the extensions for the two nurses’ office phone. The nurses will most likely not answer right away (b/c it is their office number), but just leave one nurse a message and one of them will get back to you. That being said, if it is a medical emergency, please call 911 or go to the nearest emergency department—do not wait for the clinicians to return your call.”*
   1. Medly Kit #
   2. Samsung phone number:
   3. Phone password: 123456
   4. Username: Medly0#; Password: medly0#

* *Let patient know rarely ever will they need this information because I have already set up their phone*

1. Training the patient with the equipment:

* Patient accepts the terms and conditions
  + *E.g., Go to the nearest emergency department immediately if you experience severe symptoms*
  + *E.g., Medly application is not a substitute for professional medical advice, diagnosis or treatment. If you suspect you have a health problem, please consult your doctor*
  + *E.g., App is intended for self-management purposes*
  + *E.g., Medly is not designed for use without the supervision of a trained medical practitioner*
* Get patient to take all their measures (training) and verify that the weight and BP measure successfully transfer to the phone
  + Make sure your phone is in the same room as the scale to ensure readings transfer
    1. Morning reading
    - “Every morning when you open the app, you will see what readings you need to take: e.g., ‘take your weight; take your blood pressure; enter your symptoms and hit done’”
    - *“****It is very important that you take ALL THREE measures between 4am-12pm in order to the alerts to work and for your clinician to receive all your information so they can follow up with you if needed”***
* Weight:
  + *“Remember you need to take your morning weight shortly after waking; after using the washroom; before having breakfast; without clothing on”*
  + *“Weight will always appear in pounds on the Medly app”*
    - (if patient wants to see weight in kg on the scale you can push the small black button on the back of the scale to change it to kg)
  + *“Please make sure you always take your weight on a hard surface (NOT on carpet!)”*
  + \*Make note of the weight on the on-boarding slip
* Blood Pressure”
  + *“Remember when measure your BP your feet have to be flat on the floor; arm resting on lap or table; cord facing downwards; rest a few minutes before taking measures; no talking”*
  + \*If HR is abnormally low, consult the physician and get them to double check the HR before the patient leaves the clinic (low HR may be due to high burden of PVCs – premature ventricular contractions)
* Symptoms
  + *“There is a list of questions and you have to write ‘Yes’ or ‘No’.*
  + *“Some questions ask you to compare your feeling to your own baseline (e.g., are you more tired than usual?). It is not asking if you are tired overall, but instead it is asking if you are more tired than you usually are.”*
  + *“If you select ‘N’ for all the symptoms, it will say “none recorded” meaning you said No for all symptoms.*
  + Note: the ICD will be disabled if patient doesn’t have an ICD
* Alerts
  + *“Once you are done, the app will give you feedback on how you’re doing & your information will be sent to your care team who will follow up with you, if necessary”*
  + *Explain the alerts:*
    - 1. Blue card – okay
      2. Orange card – notification
      3. Red card – notification + **emergency**
      * Note: During demonstration the card may be orange or red – explain that it is just based on the default measures (*e.g., “right now according to the system you weigh 50 pounds, but we will update the system with your personalized parameters” etc.)*
      * \*\*Inform patients that this app is **not a substitute for regular procedures**: *“if it is a blue card but you are feeling ill, still consult your physician. The goal of Medly is to help guide self-improvement of your condition and enhance communication with your healthcare team. It is not intended to replace your current care, but to supplement it. If you are ever concerned about any of your readings or alerts, contact the clinic”*

1. Show patient the trends page

* Different views
  + Long-term picture (days, weeks, months)
    - Blue range = targeted range (we will set up a target range and your clinician will update accordingly)

1. Show patient the ‘call the clinic’ button (Go to your care team, under general information)

* “You can use this phone to call the clinic by dialing the number directly or coming to this page and clicking on ‘Heart Function Clinic’ and entering the nurses’ extension number. Please do NOT use this phone for any other calls (e.g., long distance etc.) and do not use it to download/stream etc.”

1. Program expectations

* Daily readings – 1 morning reading every day (minimum)

1. Adherence Calls:

* If you do not take your weight before 10am, you will receive a reminder call
  1. **Can you verify what number you would like the adherence calls to be sent to?**

1. Rules:

* Do not delete any apps
* Do not download/music/movies/videos/photos; no data streaming; YouTube/Netflix restricted
* Please leave your phone connected to the charger at all times
* Please use the phone only for this Medly app, you are expected to remain within the 500 MB limit of your data
* Kit is not to be used by anyone else
* Phone not to be used for personal calls
* Other:
  + Please connect to your WiFi at home, if possible
  + Please contact us immediately if you lose your phone
  + Please contact tech support if you lose your phone (we can remotely wipe out your data to maintain confidentiality)

1. Not taking any measure (e.g., traveling, admitted to the hospital etc.)

* Please call tech support with the dates you will be away/not taking measures so that the adherence reminder calls can be temporarily disabled and then I will inform the clinicians

1. Off-boarding procedure – bring in the kit or mail it in
2. **Before patient leaves, make sure to log out of the training account and log into their personal account**

**Remove any Medly accounts:**

* + 1. **Settings > Accounts > Select Medly > Click More > Remove**
  1. **Clear data from the app:**
     1. **Settings > Applications > App Manager > Select App > Clear Data**
  2. **Go to the Medly app > [enter patient’s username and password]**

**After Patient Leaves**

1. Update inventory and external lab tracking spread sheet

* Inventory file name: Copy of Medly Patient Kit List\_SWYH updated(1)
  + Patient name, Status (write deployed), Date Started
* External labs file name: Medly Patient List (External Labs)
  + Enter all info (keep list in alphabetical order)

1. \*\*Update patient information in dashboard:

* Change dummy information to real information
  + Patient adherence: enable
  + Patient in Study arm: enable if patient is in the RCT
  + Email alerts to caregiver: enable
  + ICD: (verify on the on-boarding slip)
  + Home ECG: remains disabled
  + Take Lasix: (verify on the on-boarding slip)
  + Weight: in pounds
  + BP/HR: (verify on the on-boarding slip)
  + DO NOT CHANGE K or Hemo unless asked to
  + DO NOT CHANGE

1. Sign off the on-boarding slip once parameters have been entered
2. Enter patient’s list of medication on dashboard (Name, Dose and Frequency (e.g., b.i.d./daily.as needed etc.)

* Will become available within 24 hours on the Electronic Patient Record (EPR)
  + *[Log into EPR > All UHN patients > search patient’s name under ID (search by last name, first name) > Look for patient’s name (verify MRN) > Look for Date & Heart Function > Click Chart Review > All events > Look by Date for “Clinic Note” or “Letter…” > Open the letter and keep pressing next until you find the medication list > Type medication into dashboard]*

1. **Put Medly sticker on the patient chart**
2. Photocopy the on-boarding slip and place original copy of the slip it into patient’s chart (via Medical Records) and the photocopied copy in the Telehealth white binder
3. **Email clinicians (CC Enza, Margaret and Patrick) details about patients enrolled that day**
   * Enza’s email: Enza.DeLuca@uhn.ca
   * Margaret’s email: Margaret.Brum@uhn.ca
   * Patrick’s email: patrick.ware@mail.utoronto.ca

* **Sample email below:**

Subject: Medly: On-boarding patient list for [date]

Hi Heather, Meredith and Nadia,

On [date] [x] patients were recruited: [#] in the control arm of the RCT; [#] in Medly arm of the RCT, and [#] in Medly Program.

Control arm of RCT

Last name1, First name1

Medly arm of RCT

Last name1, First name1

Phone1

Email1

Weight during training:

Program:

Last name1, First name1

Phone1

Email1

Weight during training:

**You will begin receiving Dashboard alerts and email alerts for the patients in the Medly arm of the RCT and/or the Program. Please follow the next steps for these patients:**

**□ Check the Dashboard over the next couple of days**

**□ Adjust the patient’s threshold on the Dashboard, if necessary**

*Note: The on-boarding slip has been placed into the patient’s chart (via Medical Records). This patient’s baseline medications will be entered into the Dashboard within the next 2 business days. Please verify the medications on the dashboard.*

If you have any questions, feel free to email me back at [iqra.ashfaq@uhn.ca](mailto:iqra.ashfaq@uhn.ca). For any Medly technical support, please contact me at [medlysupport@ehealthinnovation.org](mailto:medlysupport@ehealthinnovation.org) or 647-926-9724 (Monday-Friday 8am-4pm).

Cheers,

Iqra Ashfaq

Telehealth Department

1. Email Rommel the updated patient list for external labs

* Rommel’s email: Rommel.Tuason@uhn.ca

**Throughout the study/program**

1. Check dashboard:
2. Make sure the # of alerts matches the # of emails
3. Monitor non-compliant patients
4. Check fresh desk
5. Check if any new tickets
6. Check phone
7. Missed calls/voicemail
8. Restock kits
9. Monitor patients
10. Check in with certain patient a few days after enrollment. This would be done on a case by case basis and would involve checking in, reminding patients on what is required, and addressing any issues.