Topics	Page No.
Overview	4
Purpose	4
Version Control	4
Glossary	5
Web Portal	7-13
All Programs’ list-view screen	7
Program Dashboard	7
All Patients’ list-view screen	8
Courses’ list-view screen	8
Rules’ list-view screen	9
Prescription Templates’ list-view screen	9
Notifications screen	10
Patient’s Medical Chart	10
Patient’s Medical history	11
Patient Courses	11
Patient Rules	12
Patient’s Prescription	12
Patient’s Medical Notes	13
Patient’s Personal Details	13
Frequently Asked Questions (FAQ)	14-22
How do I login to the YourPal application?	14
How do I create a new program?	14
How do I add a new patient in the YourPal application?	14
How do I create a new course in a Program?	15
How do I create a new rule in a Program?	17

How do I create a new Prescription Template for all the doctors?	17
How do I enable notifications for the patients in my program?	18
How do I go to the patient’s dashboard?	18
How do I resolve the Patient’s alerts?	18
How do I save or print a patient’s reports?	19
How do I add a new disease in the patient’s medical history?	19
How do I edit an existing disease in the patient’s medical history?	19
How do I update Patient’s Social History?	19
How do I add a record for the Family Medical History?	19
How do I assign a course to a patient?	20
How do I create a personalized rule for a patient?	20
How do I create a prescription for a patient?	20
How do I select a prescription template?	21
How do I add Admin notes?	21
How do I edit the Admin notes?	21
How do I add Consultation notes?	22
How do I add Other notes?	22
How do I add Summary notes?	22
How do I edit the patient’s Personal Details	22
Troubleshooting	23-23
Why do I not have the ‘Add Program’ button?	23
Why can’t I create a patient account?	23
Why can’t I edit or delete an existing course?	23
Who can view the template created by a doctor?	23
Why is the patient not receiving notifications for reminders/mandates?	23
Why am I not able to see Admin notes?	23

1. Overview

YourPal is an application offering remote patient monitoring assistance to medical professionals and their support/administrative staff. Through the Web Portal, the web application part of YourPal, an administrator and/or doctor will be able to add, manage, and supervise patient accounts, courses and rules assigned to each patient's account, their prescriptions, etc., including all any reading alerts generated by a patient's reading.

2. Purpose

The purpose of this document is to provide information and necessary steps about the different functionalities available for administrators and/or doctors. It's an explanatory document to list out the different modules available within the Web Portal. This is a go-through document to understand the functionalities available in the panel.

The intended audience of this document is administrators and doctors enrolled in the system.

3. Version Control

Sr.No	**Document Title**	**Version**	**Description**
1.	*YourPal - Web Portal Manual*	1.0	Information and steps for different functionalities available in the application.

4. Glossary

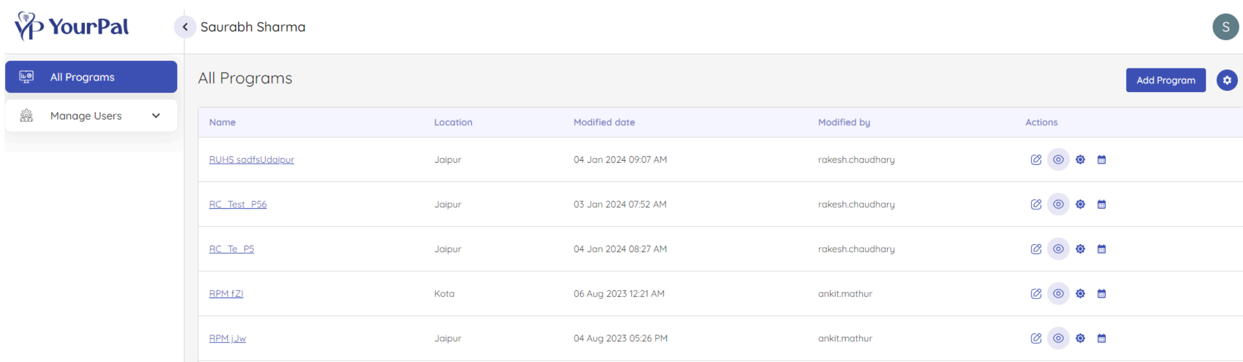
- **Program**: A program is a hospital or clinic that is running in the same or different cities under one name.
- **Vital**: Vital is an essential body function like blood pressure, pulse, blood glucose, etc.
- **Course**: A course is a doctor-defined period with a collection of mandates that a patient must follow. The duration of a course will be in days. Although the YourPal application comes with eight pre-defined courses, a doctor can create as many courses as per their needs.
- **Mandate**: It is a doctor prescribed time duration during which the patient needs to take his or her vital readings. The duration of a mandate will be in hours.
- **Status of a course**: Whenever a course is assigned to a patient, the status of that course becomes active for that patient.
- **Active Course**: If the status of a course is active, it means that the patient is required to take that vital's readings as per the doctor's prescribed mandates till the course is active.
- **Course Duration**: Every course has a fixed duration with a specified start and end dates as prescribed by the doctor.
- **Inactive Course**: Once the course's duration gets over, it automatically becomes inactive or if the doctor assigns another course, the previous course will become inactive.
- **Rule**: In the YourPal application, a doctor creates a rule that governs to which stage a reading belongs. The YourPal application has three different rules for each vitality - Blood Pressure, Pulse, and Blood Glucose.
- **Stage**: A stage is a range of values that constitutes or defines the degree of normalcy for your vital.
- **Reading**: The process of measuring Blood Pressure or Blood Glucose using the Yourpal provided devices and recording/syncing the result with the YourPal mobile application is known as reading.
- **Alerts**: Every reading is categorized in a stage by the applicable rule set by the doctor. If a reading is *not* categorized in the 'Normal' stage then a notification gets generated for the doctor. This notification is referred to as an 'Alert'. Every time an abnormal reading is recorded in the YourPal application, it generates an alert (notification) for the doctor.

- ➔ **Active Alerts**: Every alert is labeled as an ‘Active Alert’ by the application. This is done to ensure that the doctor investigates, discusses and acknowledges the underlying reason for every abnormal reading recorded by the application.
- ➔ **Resolved Alerts**: At times, the doctor may find an insignificant reason that resulted in an alert. In such scenarios, the doctor can *resolve* the ‘Active Alert’ as a sign of a follow-up.
- ➔ **Compliant**: If a patient takes all his or her readings within the mandated timing as prescribed by his/her doctor, then the patient is said to be compliant.
- ➔ **Non-Compliant**: If a patient fails to take readings within the mandated timing prescribed by the doctor, then the patient is said to be non-compliant.

5.Web Portal

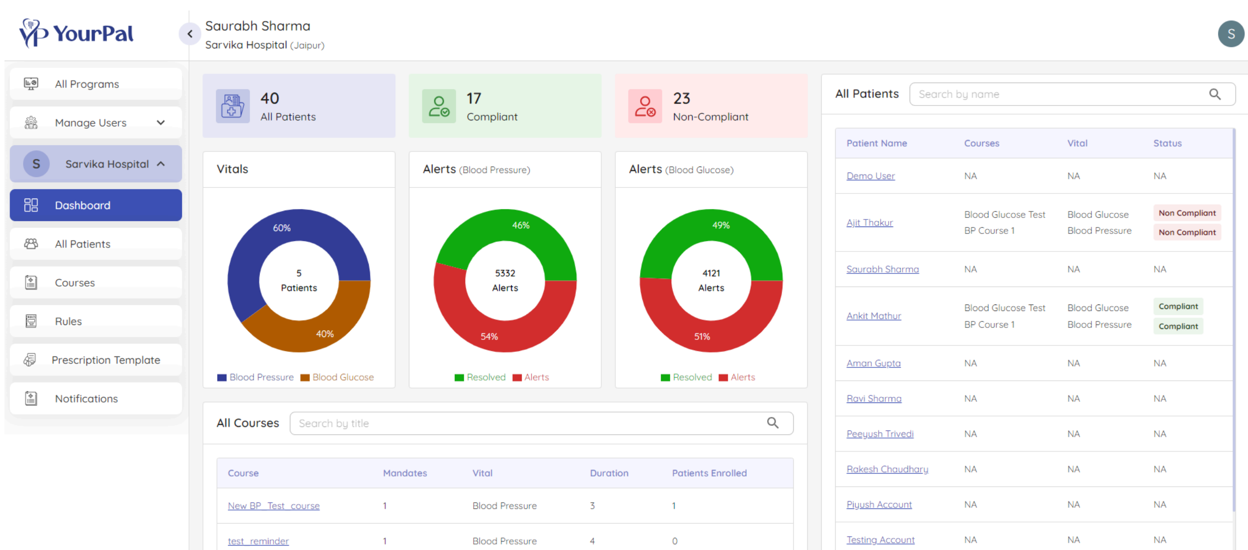
This section will list and explain the different screens available on the web portal of the YourPal application.

- **All Programs' list-view screen**



This is the 'All Programs' list-view screen. You can view a list of all the programs[6] aka hospitals that you are authorized to access.

- **Program Dashboard**

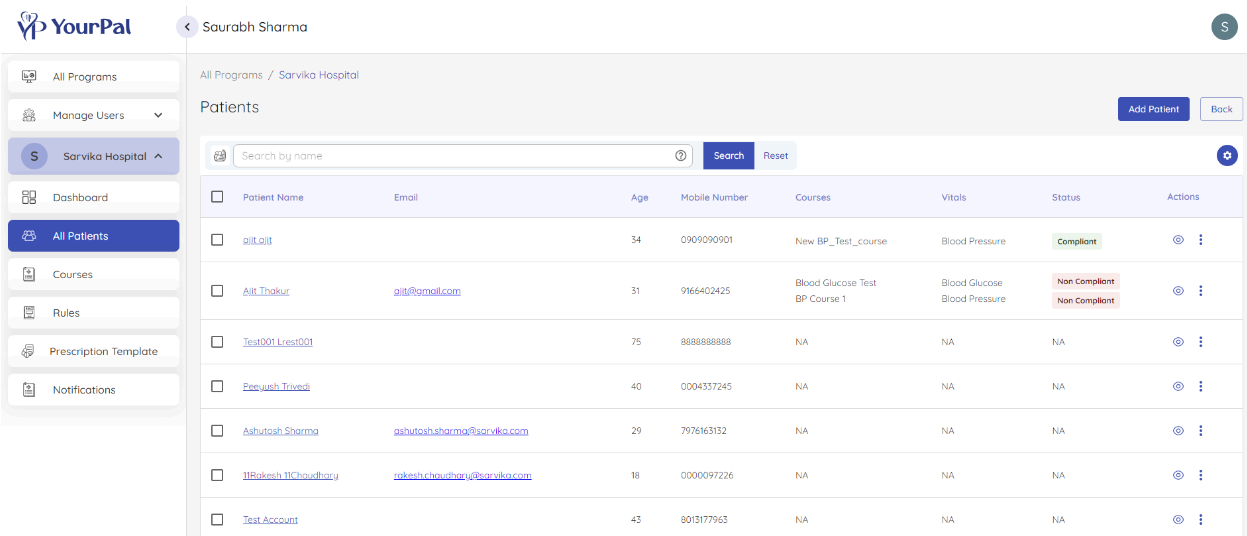


The ‘Program Dashboard’ is the go-to screen that provides a summarized, high-level view of that program. You can view metrics like total number of patients enrolled within

[6]: Refer to the page 6 of this manual for more details

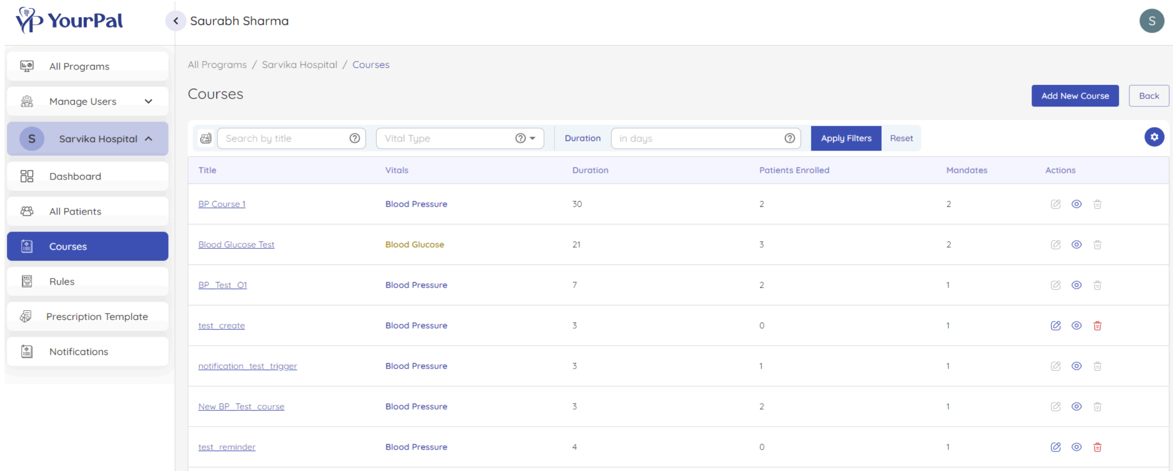
the YourPal application, total number of compliant[6] and non-compliant[6] patients, etc. You can also get to view a list of patients along with a few details, like the courses[6] each patient is enrolled in, their vitals[6] and status, and a link to view the entire list of patients. Similar details can be found for courses on the ‘Program Dashboard’ screen.

- **All Patients’ list-view screen**



The ‘All Patients’ list-view screen shows a list of all the patients of that hospital who are enrolled in the YourPal application. Along with every patient’s contact details, information like the courses[6] they have been assigned, the vitals[6] and the status[6] of each assigned course, etc. can be found in a tabular format on this screen.

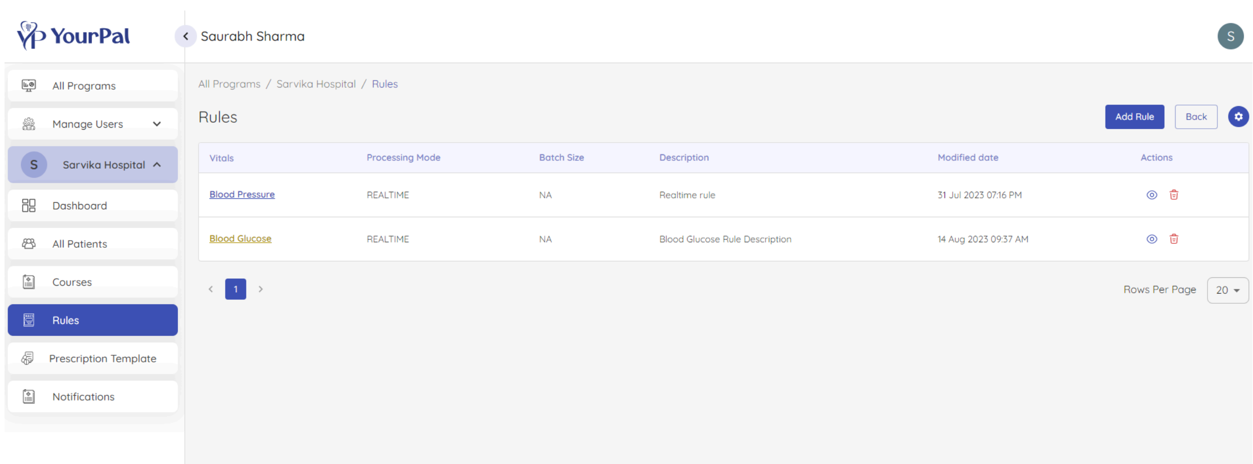
- **Courses’ list-view screen at Program-level**



[6]: Refer to the page 6 of this manual for more details

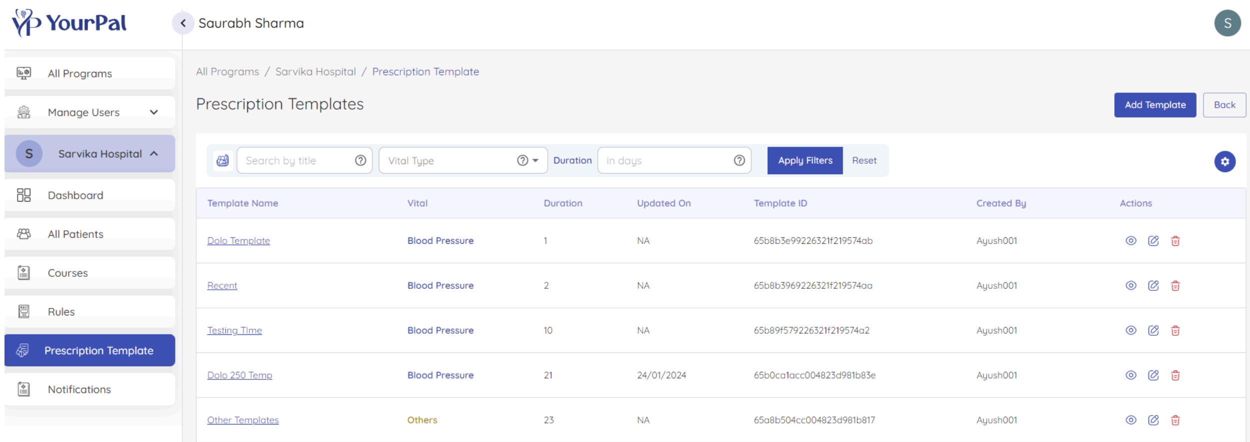
This courses' list-view shows a comprehensive list of all the courses that have been created within that program/hospital. This tabular list shows high-level information like a course[6] name, the vital[6] it belongs to, its duration, number of patients this course is assigned to, number of mandates that course contains, etc.

- **Rules' list-view screen at Program-level**



This is a rules' list-view screen showing all the rules[6] that exist at the program-level. This list screen shows information like the vital[6] the rule applies to, a brief description, and the date it was last modified.

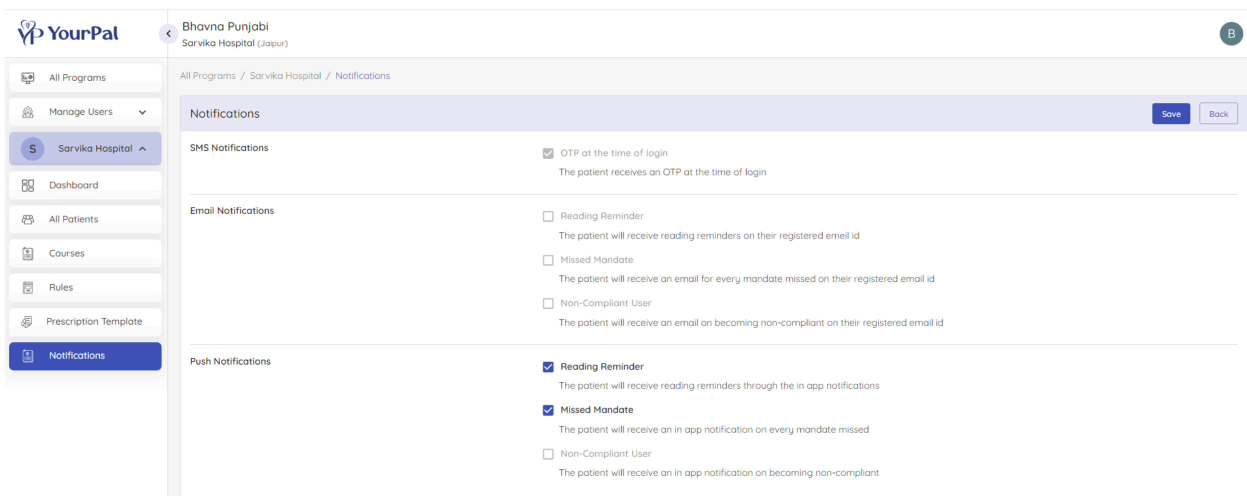
- **Prescription Templates' list-view screen at Program-level**



This screen shows all the prescription templates[6] that have been created by doctors and/or administrators in a tabular format. Details like the vitals[6] a prescription template has been created for, the duration of a prescription template, etc.

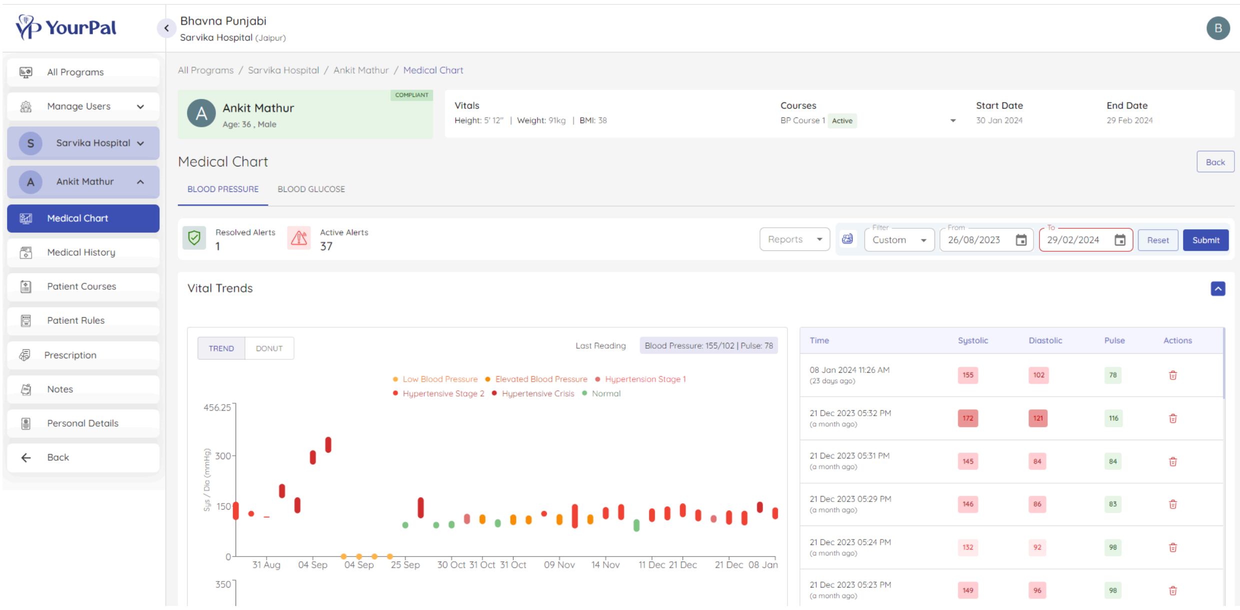
[6]: Refer to the page 6 of this manual for more details

- **Notifications**



This module enables the doctor/admin to send the notification for reminders and mandates[6] to the patient.

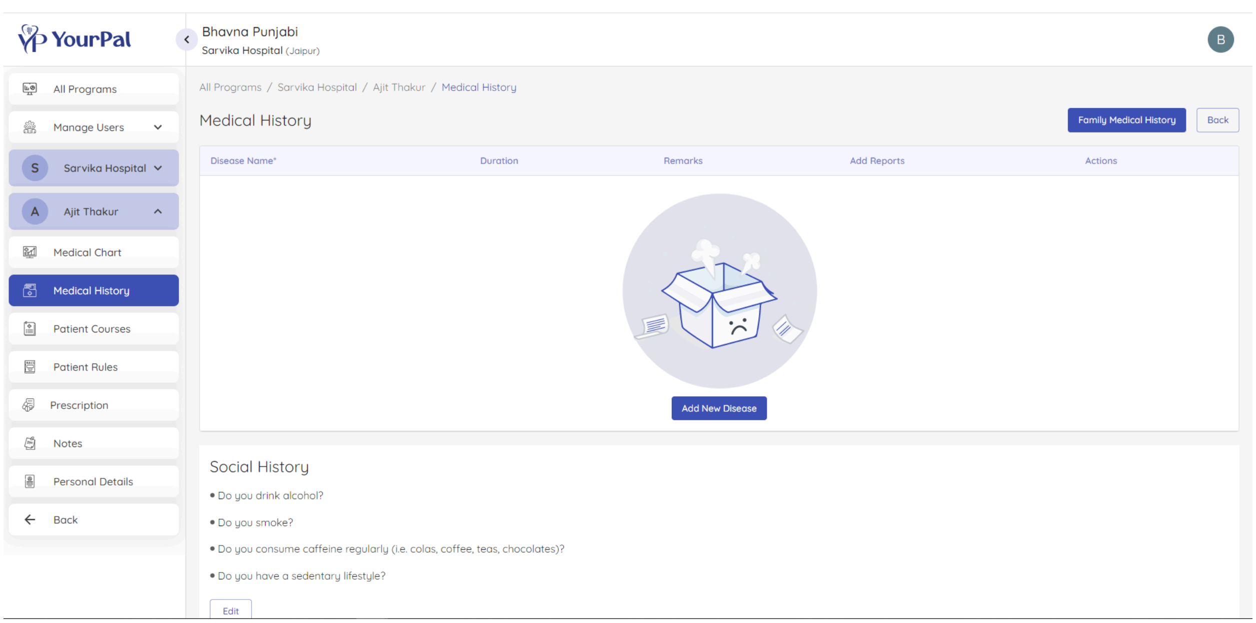
- **Patient's Medical Chart**



The Medical Chart is a visual representation (both graphical and tabular) of the summarized information of a patient's medical data and vitals readings. You can select the vitals to view the patient's vital readings and access the patient's reports. You can check the patient's active alerts[6] and follow up on these alerts to resolve them.

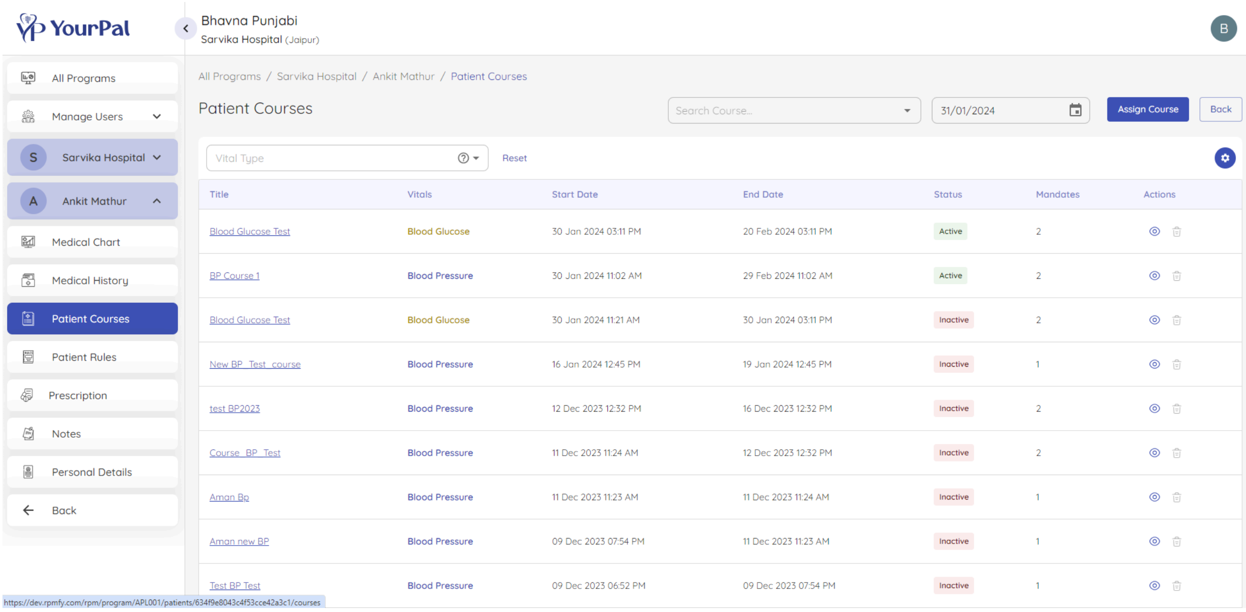
[6]: Refer to the page 6 of this manual for more details

- **Medical History**



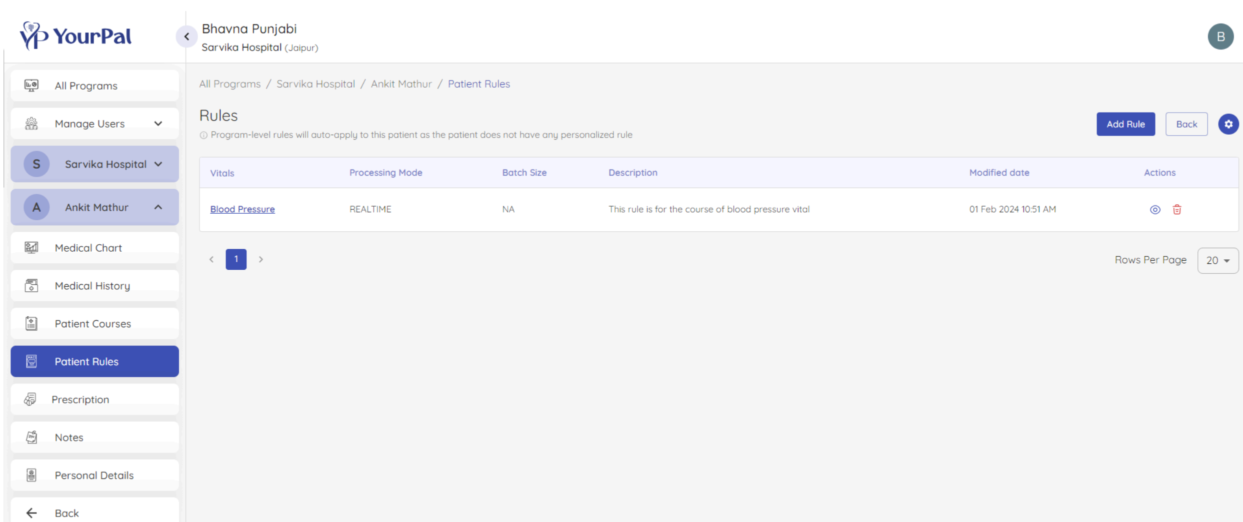
Medical History reveals the illnesses found in the patient's medical records. These records are either provided by the patients through the YourPal mobile application or added by the doctor from the Web portal. Similarly, records related to the **Social History** and patient's **Family Medical History** can be accessed from here.

- ## Patient Courses



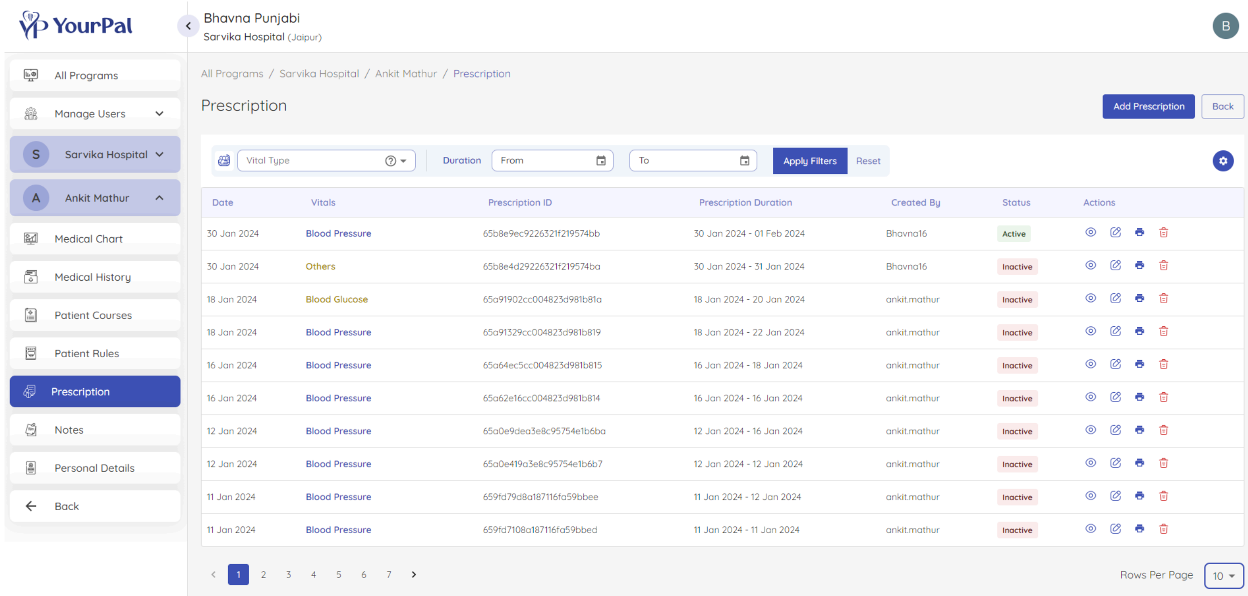
Patient Courses shows the number of courses in which the patient is enrolled for different vitals, at present and in the past. The currently active course will be labeled as 'Active' while other older courses will be labeled as 'Inactive' on this screen. These courses can be filtered out per the vitals. This module allows the doctor to assign courses to the patient with effect from a particular date.
Note: Only one course can be active per vital on a patient account.

- ## Patient Rules



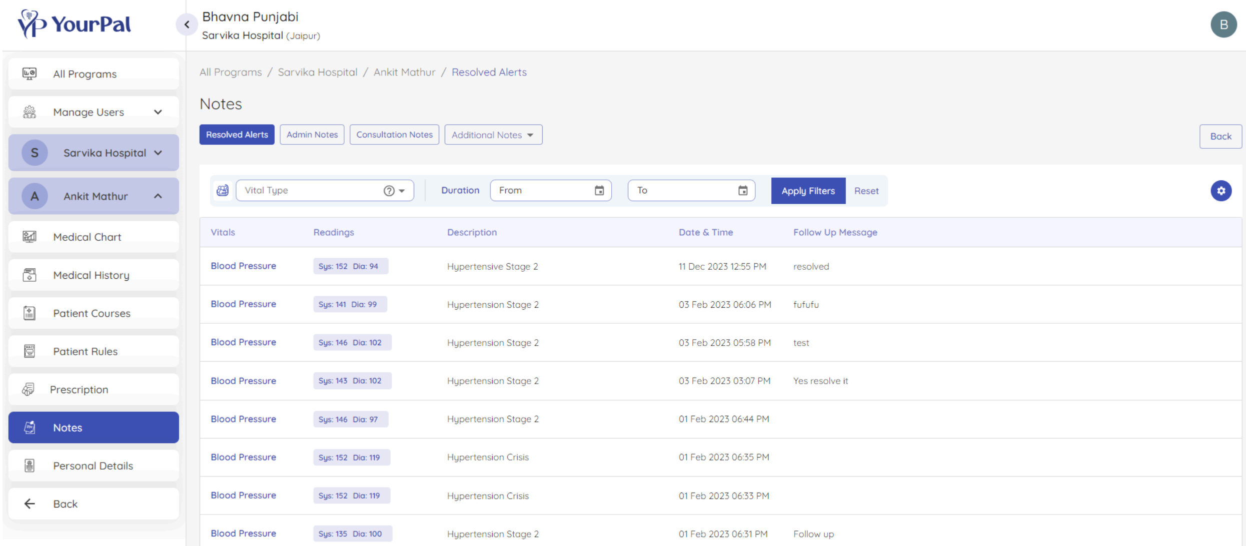
Patient Rules are the guidelines that are used to analyze a patient's readings to determine the stage the individual belongs in. You can add customized rules for the patient post examining the patient’s vital. These rules are represented in tabular format. You can modify the **table cell settings** by clicking on the gear icon. You can see the detailed rule by clicking on the **view detail** icon or the **vital name** and remove the rule attached to the patient.
Note: Program-level rules apply on the patients if no rules are set.

- ## Patient’s Prescription



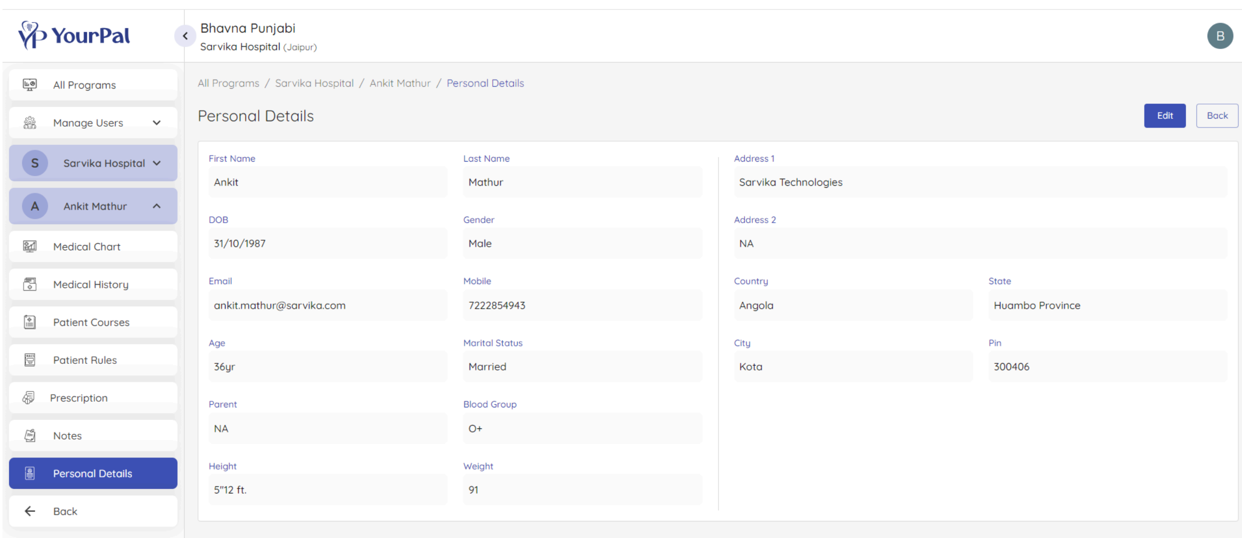
Doctors can prescribe medication to patients for their treatment using the **Prescription** module. Prescriptions created by a doctor will be issued to the patient on a real time basis on the patient’s mobile device. This screen enables the doctors to add and manage prescriptions for a patient Also, a doctor can save prescriptions as a template for future use..
Note : A prescription template created by a user will be visible to that user only.

- ## Patient’s Medical Notes



Notes are a brief record of points related to a patient's readings, diagnosis, treatment, etc., written down as an aid to memory. A doctor can access and view resolved alerts[6], consultation notes, discharge summary notes, etc., from this screen.
Note: Admin notes are only accessible to your administrator(s).

- **Patient's Personal Details**



These are the patient's personal details which includes the basic information of a patient such as contact details, gender, date of birth, address, etc.

6. How to?

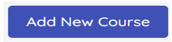
1. **How do I login to the YourPal Web Portal?**
    1. Visit https://care.yrpal.com/login.
    2. Enter your 'Account ID' and click Login
    3. Enter your username and password and click Login

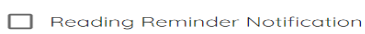
2. **How do I create a new program?**
    1. Login to the YourPal application (refer to instructions mentioned under "*How do I login to the YourPal application?*" for more details) or if you are already logged-in, then click on All Programs on the left navigation menu.
    2. You are now on the 'All Programs' list-view screen.
    3. Click Add Program button at the top right corner of the screen.
    4. A '*Add New Program*' pop-up will appear.
    5. Enter details like Program name, State and City the program is located in, etc. and click Submit
    6. A new program will be created and you will land on the dashboard of the newly created program.

3. **How do I add a new patient in the YourPal application?**
    1. Once you are logged-in in the application, click on the name of the program, in which the patient needs to be added, to land on the *Program Dashboard*.
    2. Click on 'All Patients' from the left navigation menu.
    3. You are now on the 'All Patients' list-view screen.
    4. Click on Add Patient
    5. 'Add New Patient' pop-up will appear
    6. Enter patient details like patient's name, contact details, date of birth, etc. in the relevant text boxes and click Submit button at the bottom right of this pop-up screen.
    7. You will land on the medical chart of the newly added patient.

4. **How do I create a new course?**

    1. Once you are logged-in in the application, click on the name of the program, in which the course needs to be added, to land on the *Program Dashboard*.
    2. Click on the 'Courses' from the left navigation menu.
    3. You are now on the 'Courses' list-view screen of your program.

4. Click on  button on the upper right corner of the screen, and you will land on the 'Create New Course' page.
5. You can start creating a course by entering a Course title (name), select the vital the course will cater to and enter a duration for the course in numbers.
6. Use the 'Mandate Settings' section to create a mandate by setting its start and end timings
7. The start and end time of a mandate needs to be chosen using the available clock in 24-hour format.
8. Click   to add/create another mandate within this course, if required.
9. Use the 'Notifications Settings' section to set:
    i. ***Compliance and Non-compliance criteria***: Select a 'Max Strike' value from the drop-down to set the compliance/non-compliance criteria for this course. Also, enter a title and description for this section as they are mandatory fields.

    ii. **Reading Reminder Notification**: Click on  checkbox to activate or set reading reminder notifications for each mandate and a 'Reading Reminder Notification' section will open up.
        1. Enter a 'Title' for the reminder notification.
        2. Choose a value from the 'Repetition' drop-down to send those many reminders for each mandate within a course.
        3. The value selected in the 'Send in every mins' governs the duration between each reminder notification.
        4. Enter a text in the 'Description' textarea. This text will be sent to the patient within each reminder notification.

    iii. **Missed Reading**: Click on  checkbox to set missed reading notification for each mandate within this course and a 'Missed Reading' section with open up.

        1. Enter a title for the missed reading notification
        2. Enter a text in the 'Description' textarea. This text will be sent to the patient as a missed reading notification.

10. Click on  button to create the course.

<u>Note</u>: A course will always be created at the Program-level.

5. How do I create a new rule in a program?

1. Once you are logged-in in the application, click on the name of the program, in which the rule needs to be created, to land on the *Program Dashboard*.
2. Click on ‘Rules’ from the left navigation menu.
3. You are now on the ‘Rules’ list-view screen of your program.
4. Click on 

button and you will land on the ‘Add New Rule’ page.
5. Select a value from the ‘Vital Type’ and ‘Processing Mode’ from the available drop-down lists.
6. Under the ‘Vital Type’ drop down, select ‘Blood Pressure’ to create a rule for the blood pressure and pulse vitals and select ‘Blood Glucose’ to create a rule for the blood glucose vital.
7. To create a rule for a vital, you will have to set the range of every stage for that vital using the slider available. Each stage within the slider is depicted with a different color code.
8. To set the upper limit of every stage, press the left button of your mouse on  and it will convert into 
9. While keeping the left button of your mouse pressed, drag/move towards left or right to decrease or increase the upper limit of that stage.
   Note: To increase the upper limit, move to the right and to reduce the upper limit move to the left.
10. Adjusting the upper limit of a stage will automatically change the lower limit of the next stage.
11. Once the desired limit is reached, click on  of that stage and it will change back to  to lock the selected range.
12. The final range set for each stage on the slider can also be verified in the table provided with the rule slider.
13. After setting the desired range for all the stages and vitals, click on 

button to save this rule.

6. How do I create a Prescription Template for all the doctors?

1. Once you are logged-in in the application, click on the name of the program, in which the prescription template needs to be created, to land on the *Program Dashboard*.
2. Click on ‘Prescription Templates’ from the left navigation menu to land on the prescription templates’ list-view screen.
3. Click on 

4. Select the vital type
5. Enter the medication name
6. Select the form of the medicine

7. Based on the form of the medicine selected, you can select the shape & color of the medicine. Alternatively, you can click on Upload Image and upload the image of the medicine in order to describe it
8. Enter the strength of the medicine and select the unit of measurement
9. Select the frequency of consumption of the medicine
10. If you want to send medicine reminders for the patient, click on Set Reminders to select a preferred time and a reminder will be set on the patient's mobile device for that time slot.
    Note: You will be prompted to set reminder slots equal to the frequency of that medicine.
11. Enter the number of days for which the medicine is to be consumed
12. Enter the comments for the medication.
13. If you want to remove a record from the template, click on
14. Click on Save As Template to save this prescription as a template.
    Note: A prescription template created from this screen will be visible and accessible to other users from the patient-level prescription screen.

7. **How do I enable notifications for the patients in my program?**
   1. Once you are logged-in in the application, click on the name of the program to land on the *Program Dashboard*.
   2. Click on 'Notifications' from the left navigation menu
   3. Click on a checkbox to enable or dis-able the required notified
   4. Click on Save to save the changes

8. **How do I go to the patient's dashboard?**
   1. Login to the YourPal application (refer to instructions mentioned under "How do I login to the YourPal application?" for more details) or if you are already logged-in, then click on the 'All Programs' option on the left navigation menu and select the Program.
   2. Click on "All Patients" from the left navigation menu
   3. Click on the "Patient's Name" or
   4. You will land on the Patient's dashboard

9. **How do I resolve the Patient's alerts?**
   1. Go to the Patient's Medical Chart
   2. Scroll down and click on the Alert summary
   3. Click on Follow Up
   4. Alert Follow-Up popup appears, add follow up comments and click on Confirm
   5. Click on to delete the alert.
   6. Active Alerts once resolved appears in the "Resolved Alerts" section

10. How do I save or print a patient's report?

1. Go to the Patient's Medical Chart
2. Click on Reports
3. Select the type of report you want to generate i.e. Summarized Or Detailed
4. Click on Download button to save the report as a pdf in the system.
5. If you want to print the report, click on Print button.

11. How do I add new disease in the patient's medical history

1. Go to the Patient's Medical Chart
2. Click on Medical History from the left menu
3. Click on Add New Disease
4. Enter the disease name
5. Enter the duration of the disease
6. Enter your remarks
7. Click on Add reports here .PDF, .PNG, .JPEG to add attachments, if any
8. Click on to save the record
9. Click on to discard the entry

12. How do I edit an existing disease in the patient's medical history?

1. Go to the Patient's Medical Chart
2. Click on Medical History from the left menu
3. Click on icon to edit the record

13. How do I update Patient's Social History?

1. Go to the Patient's Medical Chart
2. Click on the Medical History from the left navigation menu
3. Click on Edit button in the Social History section.
4. Select Yes No on every option as per the patient's preference
5. Click on Save to save the changes.

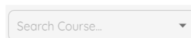
14. How do I add a record for the Family Medical History?

1. Go to the Patient's Medical Chart
2. Click on the Medical History from the left navigation menu
3. Click on Family Medical History
4. Click on Add New Disease button.
5. Select the relation.
6. Enter/select the disease name.
7. Enter the value and select the period of the disease(if any).

8. Enter the remarks (if any).
9. Click on  to upload reports for the disease (if any).
10. Click on  to save the record
11. Click on  to discard the entry

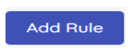
Note: Disease name and Relation are mandatory fields in order to save the record.

15. How do I assign a course to the patient?

1. Go to the Patient's Medical Chart
2. Click on the Patient courses from the left navigation menu
3. Select the course from 
4. Enter/Select the date by clicking on 
5. Click on the  button

Note: If the user assigns the course without selecting a future date, the course begins on the current day and time.

16. How do I create a personalized rule for a patient?

1. Go to the Patient's Medical Chart
2. Click on the Patient rules from the left navigation menu
3. Click on 
4. Select the vital type
5. By default real time processing mode is selected
6. Add the description of the rule
7. Unlock and drag the scale of the systolic and diastolic level to set the rule.
8. Drag left to reduce the range of the stage, this increases the range of the corresponding stage, vice versa is also true.
9. Lock once the rule for one level has been set.
10. The range set by the doctor gets reflected in the tabular representation per the stages
11. Set the pulse range in a similar manner.
12. Click on  button to save the changes Click on  button to reset the rule.

17. How do I create a prescription for a patient?

1. Go to the Patient's Medical Chart
2. Click on the Prescription from the left navigation menu
3. Select the vital type
4. Enter the medication name
5. Select the form of the medicine

6. Based on the form of the medicine selected, you can select the shape & color of the medicine
7. You can also click on Upload Image and upload the image of the medicine in order to describe it
8. Enter the strength of the medicine and select the unit of measurement
9. Select the frequency of consumption of the medicine
10. You can also click on Set Reminders to receive reminders to take the medicine, these reminders will vary on the frequency of the dosage
11. Enter the number of days for which the medicine is to be consumed
12. Enter the comments for the medication.
13. Click on to delete the medicine
14. Click on to create a new blank record to another medicine.

Note: Vital type, medicine's name, frequency and days are mandatory fields in order to save the prescription.

18. How do I select a prescription template?

1. Go to the Patient's Medical Chart
2. Click on the Prescription from the left navigation menu
3. Click on Select Template
4. Select the template from the available templates already saved in the application

19. How do I add Admin notes?

1. Go to the Patient's Medical Chart
2. Click on the Notes from the left navigation menu
3. Click on the Admin Notes
4. Click on + Add New Note
5. Select the Vital type from the dropdown
6. Enter the remarks, you can also edit/format the remarks
7. Click on Add reports here PDF, PNG, JPEG to add reports
8. Click on Save to save the note

20. How do I edit the Admin notes?

1. Go to the Patient's Medical Chart
2. Click on the Notes from the left navigation menu
3. Click on the 'Admin Notes' button and you will land on the list view screen showing all available admin notes for the patient.
4. Click on for the note that you want to edit.

21. How do I add Consultation notes?

1. Go to the Patient's Medical Chart
2. Click on the Notes from the left navigation menu
3. Click on the Consultation Notes
4. Click on + Add New Note
5. Select the Vital type from the dropdown
6. Enter the remarks, you can also edit/format the remarks
7. Click on Add reports here .PDF, .PNG, .JPEG to add any reports, if needed
8. Click on Save to save the note

22. How do I add Other notes?

1. Go to the Patient's Medical Chart
2. Click on the Notes from the left navigation menu
3. Click on the Additional Notes
4. Select Other notes from the dropdown
5. Click on Add New Note button
6. Select the Vital type from the dropdown
7. Enter the remarks, you can also edit/format the remarks
8. Click on Add reports here .PDF, .PNG, .JPEG to add any reports, if needed
9. Click on Save to save the note

23. How do I add Summary notes

1. Go to the Patient's Medical Chart
2. Click on the Notes from the left navigation menu
3. Click on the Additional Notes
4. Select Summary notes from the dropdown
5. Click on Add New Note button
6. Select the Vital type from the dropdown
7. Enter the remarks, you can also edit/format the remarks
8. Click on Add reports here .PDF, .PNG, .JPEG to add any reports, if needed
9. Click on Save to save the note

24. How do I edit the patient's Personal Details

1. Go to the Patient's Medical Chart
2. Click on the Personal Details from the left navigation menu
3. Click on Edit button
4. Edit the patient's details

5. Click on 

to save the changes

6. Troubleshooting

1. **Why do I not have the 'Add Program' button?**
    a. The ability to add a program is provided to specific user-roles only based on their work requirements. If you want to create a new program then you have to contact the YourPal support.
2. **Why can't I create a patient account?**
    a. The ability to add a program is provided to specific user-roles only based on their work requirements. If you do not have access to the 'Add Patient' button and want to create a new patient account then you have to contact your administrator.
3. **Why can't I edit or delete an existing course?**
    a. You can only edit or delete a course if it is not assigned to a patient yet. Once a course is assigned to a patient, it cannot be edited or deleted as that would lead to loss of patient's readings taken during that course.
4. **Who can view the template created by a doctor?**
    a. Only the doctor who created a template at the patient-level will have access to the template. No one else, except the program administrator, has access to it.
5. **Why is the patient not receiving notifications for reminders/mandates?**
    a. Please check if the notifications are enabled for reminder/mandates for your program. Go through the steps mentioned on page 18 of this manual for more information.
6. **Why am I not able to see Admin notes?**
    a. These notes are visible only to the admin, you won't be able to access these notes if you are not assigned with the requisite user-role.