

Careful System:

Key features User Guide

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Example 'run through' of system capabilities

To get a feel of the system, we suggest you do the following tasks. You should find explanations on how to do these in the sections that follow

- 1) Register your organisation (start at www.careful.online)
- 2) Add a team
- 3) Add 2-3 patients
- 4) Confirm that this are both in the new team and on 'my patients'
- 5) Modify their demographics
- 6) Change their diagnosis / location / owner several times
- 7) Change their status several times
- 8) Add several actions for each patient
- 9) Complete some of these actions
- 10) Invite a new user
- 11) Handover your patients to the new user
- 12) Confirm that all your outstanding actions are now assigned to the new user
- 13) Confirm that all your patients are now the responsibility of the new user
- 14) Add another team
- 15) Refer a patient to the new team
- 16) Accept the patient into the new team
- 17) Confirm the patient is in both teams
- 18) Discharge the patient from one team
- 19) Discharge the patient from the second team

Starting up

Logging-in

You should have received a login that will allow you access to the system. If not, please contact your administrator or the person that invited you.

Main Menu

The main menu is down the left hand side. On a mobile device it is accessed from the three horizontal bars at the top of the screen. Your organisation will appear at the top of this main menu.

Selecting or creating a team

If you are already member of a team, then this will appear in the main menu. If not, select *Teams* and then create your own using the *Add Team* button.

Adding a patient

To add a patient, use the blue button at the bottom of the main menu. Alternatively, you can navigate to the team into which you want to add the patient, and select *Add Patient* from the team menu - the three dots next to the name of the team.

Add the patient's demographic details. Only first and last name are mandatory, but more would be helpful. You should also add a short 'current diagnosis' and a status (usually either "arrived" or "expected").

Note: any patient you add will be added to your "My Patients" list - the patients for whom you have responsibility.

Managing Patients

You should now have several patients, all of which appear both the team into which you added them (access these from *Teams* in the main menu) as well as on your own personal *My Patients* list (also available from the main menu).

In any patient list, the patient has a patient menu – the three vertical dots next to each patient – which offers several options.

This menu can also be accessed from the Patient Profile - accessed by simply clicking on the patient.

View patient details (Patient Profile)

Here you can see all at the information stored against the patient. Across the top there are four tabs:

- **Profile:** demographic data, Current diagnosis and last notes, responsible users and the teams to which the patient belongs. Also, the latest status update and location are shown here.
- **Actions:** the currently outstanding actions for the patient
- **Notes:** all the notes that have been added by users
- **Log:** a summary of everything that has happened to the patient, in time order

Edit details

Here you can amend the patient's demographic details.

Create Action

Use this option to add an action to the patient. This will be assigned to you (which means it will appear in your personal list of *Actions* from the main menu)

Add Notes

You can add to the ongoing notes for a patient. Your entry will be the latest and will appear in the patient profile.

Update status/diagnosis/location/owner

You can update these four pieces of information about the patient from this menu. Please note that "Owner" is the most senior clinician looking after the patient.

Relinquish responsibility or Take responsibility

If this patient is on your *My Patients* list, then you can remove them by selecting *Relinquish Responsibility*. If they are not on your *My Patients* list then you can add them by selecting *Take Responsibility*.

Handover patient

Use this option to handover a single patient to another user. Please note, that you can also handover all patients within a single team to another user from the team menu. (See Handover section below)

Discharge

This removes the patient from the team.

Transfer patient to another team

This allows you to select another team to look after the patient. This will create a 'sent referral' in the referring team's Referrals section - this can be cancelled by any member of the team.

The referral will also create an 'received referral' in the receiving team's referral section. This can be accepted or rejected by any member of that team. If the referral is accepted, then the patient will be seen by, and looked-after by both teams.

Team Management

When you select a team, there are three options available from the team menu, accessible from the three-dots next to the team name.

- Add Patient
- Invite User to Team
- Handover all my patients in this team
- Take responsibility for all patients

There are also four tabs about this team

- **Patients:** the list of all patients currently being cared-for by this team
- **Members:** the users who have access to this team's patients
- **Log:** this shows an audit-trail of all the events that have happened to the team (patient movements, user movements and referrals)
- **Referrals:** this shows any outstanding referrals made or received.

Add patient

Add the patient's demographic details. Only first and last name are mandatory, but more would be helpful. You should also add a short 'current diagnosis' and a status (usually either "arrived" or "expected").

Note: any patient you add will be added to your "My Patients" list - the patients for whom you have responsibility.

Invite User to Team

If you are an administrator for the team, you are allowed to add and remove users within the team. To add a new user, who is already registered with the system, start typing their name.

If the user is not yet known to the system you will need to invite them. Enter their name, email address and phone number. When they register they will be automatically added to the team.

Handover all my patients in this team

This will allow you to select another user within this team to whom you can transfer responsibly for your patients. See Handover section below.

Take responsibility for all patients

This allows you to move all of these team's patients onto your own *My Patients* list.

Action management

You can create actions to a patient from the Patient menu. This will be assigned to you automatically.

This means it will show-up on under **Actions** in the main menu, where you will see an action count.

To see the actions for a patient, click on the patient from the team view or *My Patients*. This brings-up the patient profile. Click on the *Actions* tab.

From here, you can re-assign an action to another user, or complete the action.

When completing the action, you can enter an optional result field. **You can copy-and-paste results or imaging reports into this field.**

You can also see all the actions that have been assigned to you under *Actions* in the main menu. Here you can also close and reassign actions.

Note that when you handover a patient (see below) your actions will be reassigned to the receiving user.

Handover

To demonstrate the handover function, you will need two users. Ensure that you have two or three patients being cared for by one team and that there are at least two users who are members of that team.

Ensure that the patients are your patients. To do so, you can *Take responsibility for all patients* from the team menu or *Take Responsibly* for each individual patient from the patient menu.

Select *Handover all patients* from the team menu and select the other user. Your handover request will be shown under *Handovers* in the main menu, on the *Sent* tab.

Ask the second user to login. Your handover request will appear under *Handovers* in the main menu, under the *Received* tab.

Accept the handover using the confirm button.

The patients will now be in the second user's *My Patients* list and any actions previously assigned to the first user will now be assigned to the second user.

Referral and Discharge

In order to refer a patient to another team, select *Refer a patient to another team* option from the Patient Menu - either in the team-list view or under *My Patients*.

The sent referral will appear under the *Referrals* tab in the team view, under *Referrals Sent*. Any member of the sending team may make a referral to any team in the organisation. Any member of the sending team may also cancel that referral.

The referral will also appear under the *Referrals* tab in the receiving team's view under the *Referrals* tab under *Received referrals*.

Any member of the receiving team may reject or accept the referral.

To discharge a patient out of the team, any user may also select *Discharge patient from this team* option under the Patient Menu, either in Team List view or under *My Patients*.

If confirmed, the patient will be removed from the team list. The patient can only be returned to the list view by being referred from another team.