Meddy Manual for Healthcare Professionals

Meddy Care

Name of the Product: Meddy Care	
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History of Changes

Date	Version	Changes made
17/12/2021	00	First draft
27/02/2022	01	Images update

Summary

1. The Meddy user interface

The application is structured in two main areas:

- A menu on the left with the list of functionalities;
- An area on the right showing the contents related to the selected functionality in the menu.

All the functionalities in the menu will be explained in the following paragraphs.

Please note:

The way the menu is displayed may vary depending on the screen resolution:

- if the screen resolution is high the menu appears in extended form (showing icons and text)
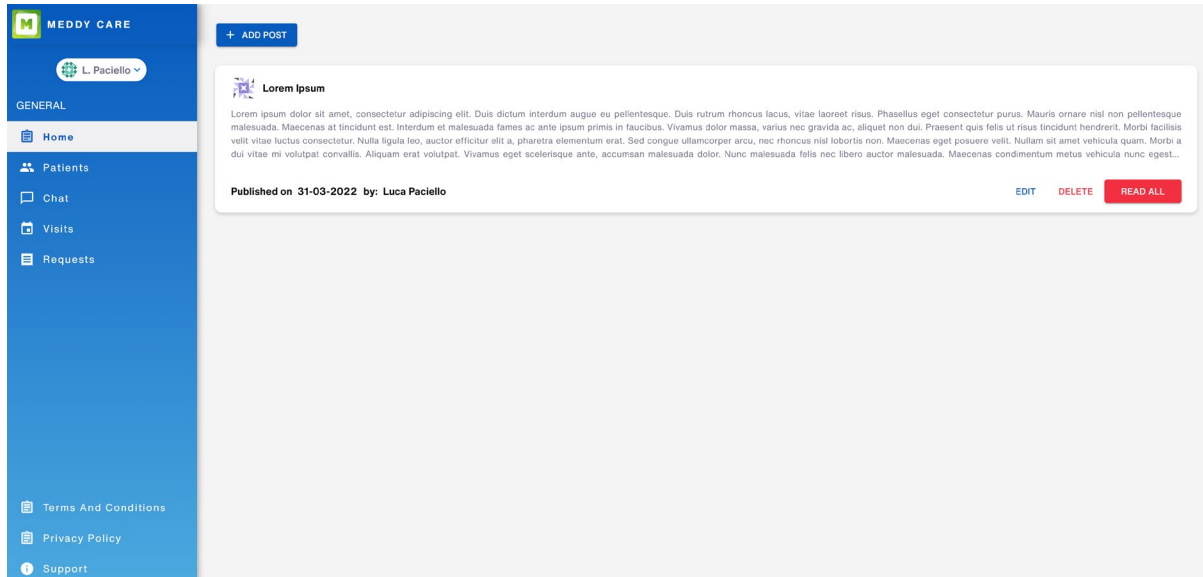- if the screen resolution is low the menu appears in compact form (showing icons only).

By clicking on the logo at the top left the menu is always opened in extended form.

2. Home

This screen shows a list of all alerts / communications to share with patients. Each communication is made up of a title and content (previewed on the home).

In this section it is possible to:

1. See the entire content of a communication by clicking on the corresponding button "READ MORE"
2. Change the title and content of a communication by clicking on the corresponding wording "MODIFY"
3. Delete a communication by clicking on the corresponding wording "DELETE"
4. Create a new communication by clicking on the "ADD POST" button at the top left.

3. Patients

The screen "Patients" allows to view the list of patients registered to the system (an export function of the entire database of patients inserted is available in pdf or csv format). Through the appropriate search field, it is possible to search for a patient by entering his name or surname.

From this screen it is possible to: access the detail of a patient, modify the data and delete the account using the appropriate keys placed on each record (VIEW; EDIT; DELETE).

It is also possible to create a new patient through the "CREATE PATIENT" button on the top right.

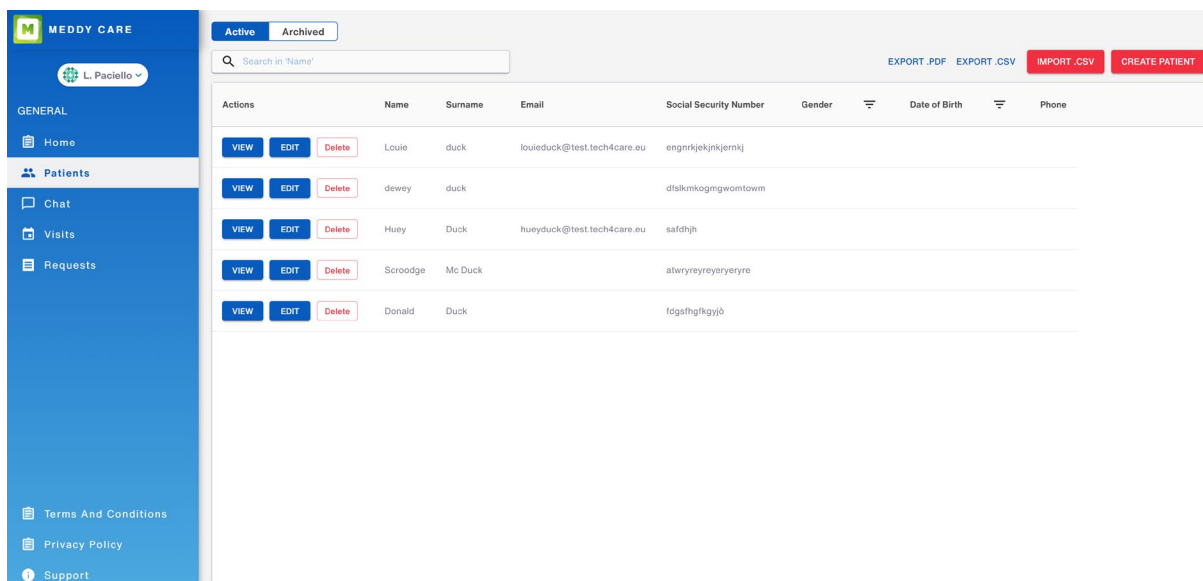All functionalities are described in detail in the following sub-paragraphs.

3.1 Create a new patient

After selecting in the left menu "Patients", by clicking on "CREATE PATIENT" (on the right part of the screen) a popup allowing to register a new patient will be opened. It is possible to enter the following fields:

– Name (required)
– Surname (required)
– Email
– Date of birth
– Gender
– Telephone number
– Social security number
– Post Code

- Province
- Country
- City
- Address
- As clearly stated in the list above, only name, surname and Social security number are required.

In order to start using Meddy Care actively, a patient will need to activate his account.

If an e-mail address is also entered when a new patient is created by the professional, the patient will receive an e-mail with instructions for activating the account (invitation valid for 72 hours). If the e-mail address is not entered when creating a new patient, it will be possible to

Please note:

The creation of a patient without an e-mail address still allows to keep the person in the system, but this person will not be able to access the Meddy Care service in any way.

do so later by modifying the patient's details and pressing the appropriate "GENERATE CREDENTIALS" button.

3.2 Delete a patient

Using the "DELETE" button placed on a patient record in the active patients list, it is possible to move the patient record to the deleted patients list. The patient thus eliminated will no

longer be able to access Meddy Care services while the professional will always be able to view all the data related to him by viewing the details from the list of deleted patients.

Once removed, you can also restore a patient using the "restore" button: the patient will be moved to the list of active patients. This operation will allow the patient to access Meddy Care services again with the credentials previously created.
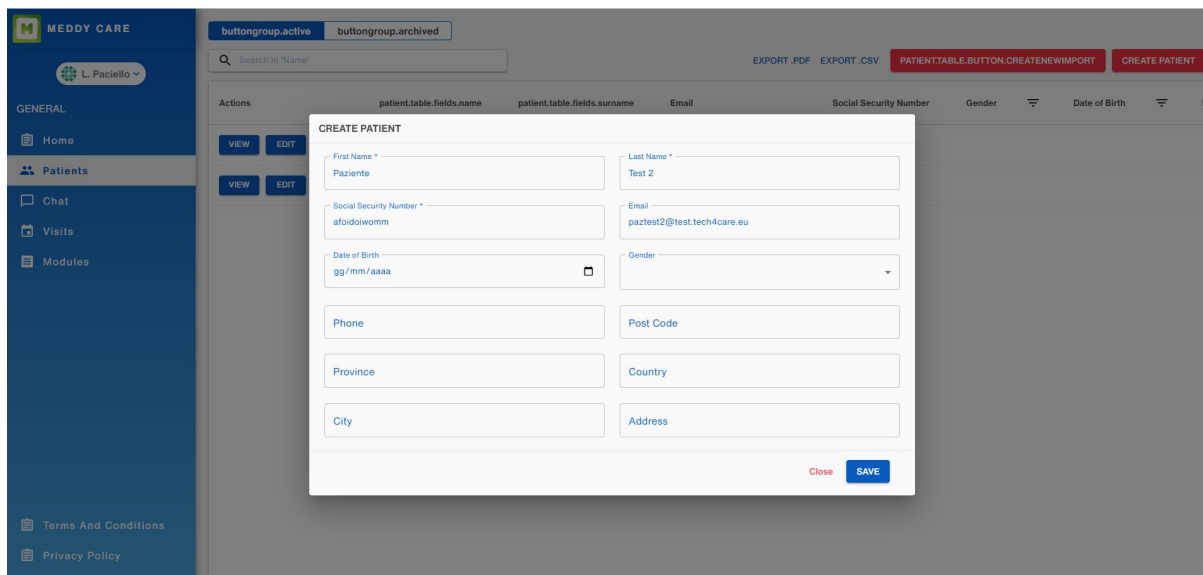
> Please note:
>
> Upon elimination of a patient, all visits scheduled with him will be canceled. If the patient is restored, the scheduled visit is re-established in the calendar only if the slot is still available.
>
> Once the patient is deleted, the chat messages will be retained but the wording "(deleted)" will appear next to his name in the chat.
>
> Requests made by the patient before elimination will continue to be displayed normally even if in the "pending" section. The response to the request can then be made but the patient will not be able to view it unless it is restored later.

3.3 Modify patient data

By clicking the "EDIT" button placed on the patient record in the list, a popup will open allowing to modify the data related to the selected patient. The popup is identical to the one for registering a new patient.
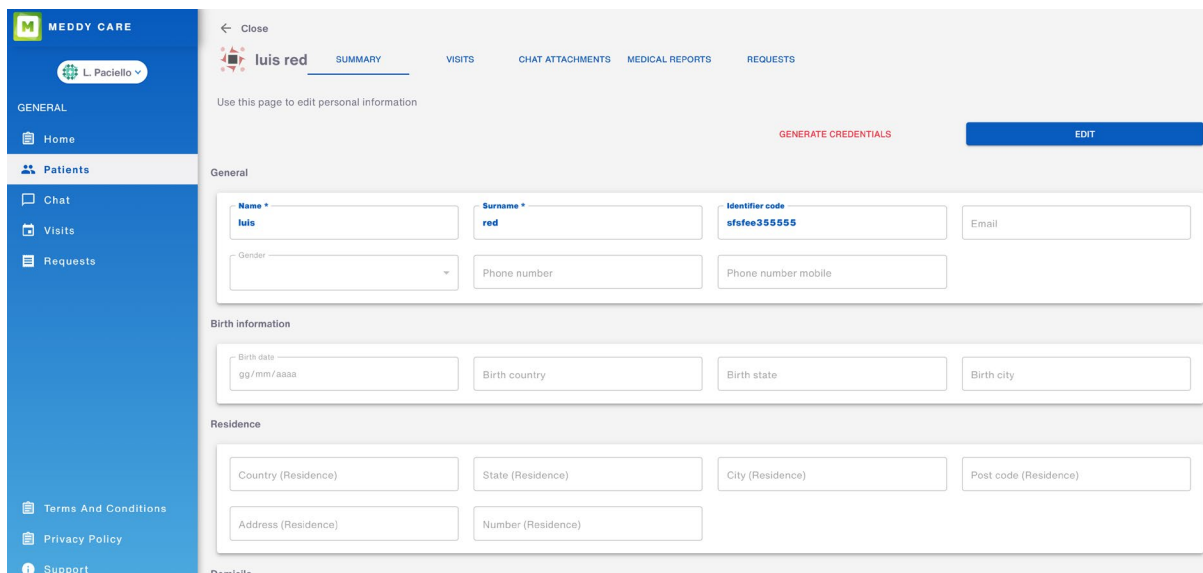
3.4 View a patient

The "VIEW" button directs to a screen where it is possible to view and manage all the data and functionalities related to the patient. This screen is in turn divided into other subsections accessible via the tabs at the top right of the interface (next to the patient's name):

1. Summary
2. Visits
3. Chat attachments
4. Medical reports
5. Requests

Below is the description of each of these sections.

3.4.1 Summary

In this section it is possible to view and modify patient data. To modify it, click on the EDIT button and then on SAVE. This section will allow to enter some more data than those entered during registration (such as, for example, address and data of birth).

If the patient has not yet activated his account, next to the EDIT button there will be a button with the clickable red wording "GENERATE CREDENTIALS". This button allows to send the patient an automatic e-mail with the link to generate username and password and activate his account. Obviously, if an e-mail address has not been entered in the patient data field, the operation will fail.

If the patient has already activated his account, instead of the button "GENERATE CREDENTIALS" the following buttons will appear:

- RESET CREDENTIALS: to send the patient an email to completely reset the credentials, both username and password;
- RESET PASSWORD: to send the patient an email to change the password;
- BLOCK ACCOUNT: to block the user related to the patient, preventing him from accessing Meddy Care (moving the patient to the deleted patient list).
- If the account has already been blocked, the wording RESTORE ACCOUNT will appear instead of the word "block account" through which you can restore the previously blocked account, thus re-entering the patient in the list of active patients.

3.4.2 Visits

In this section it is possible to view the patient's visits with a preview of the notes and their status: done (when already carried out); scheduled (when not yet carried out).

Through the SEARCH field it is possible to filter the visits based on the content of the notes while with the DELETE and EDIT buttons it is possible to respectively delete a visit or modify its notes.

Finally, using the "BOOK A VISIT" button it is possible to book a new visit for the patient by quickly accessing the "Visits" section.

3.4.3 Chat attachments

In this section it is possible to retrieve the documents exchanged in chat with the patient, both those sent and those received. Also in this section it is possible to use the SEARCH field to quickly find the relevant document.

3.4.4 Medical reports

The "medical reports" section allows to see all the reports compiled for the patient: at the end of a visit it is possible to access this section and fill in a new report using the button "CREATE NEW REPORT". In case of error, the reports can be archived by clicking on the "Archive" button. It will be visible under the "Archived" section (but no longer visible to the patient).

3.4.5 Requests

The "requests" section allows the management of all prescriptions related to the patient in question. See section 5 for more details.

4. Visits

In this section it is possible to view the calendar of visits and define one or more agendas with which to program the availability for reservations through the two specific subsections:

1. VISITS, where to see the calendar with availability and appointments booked;
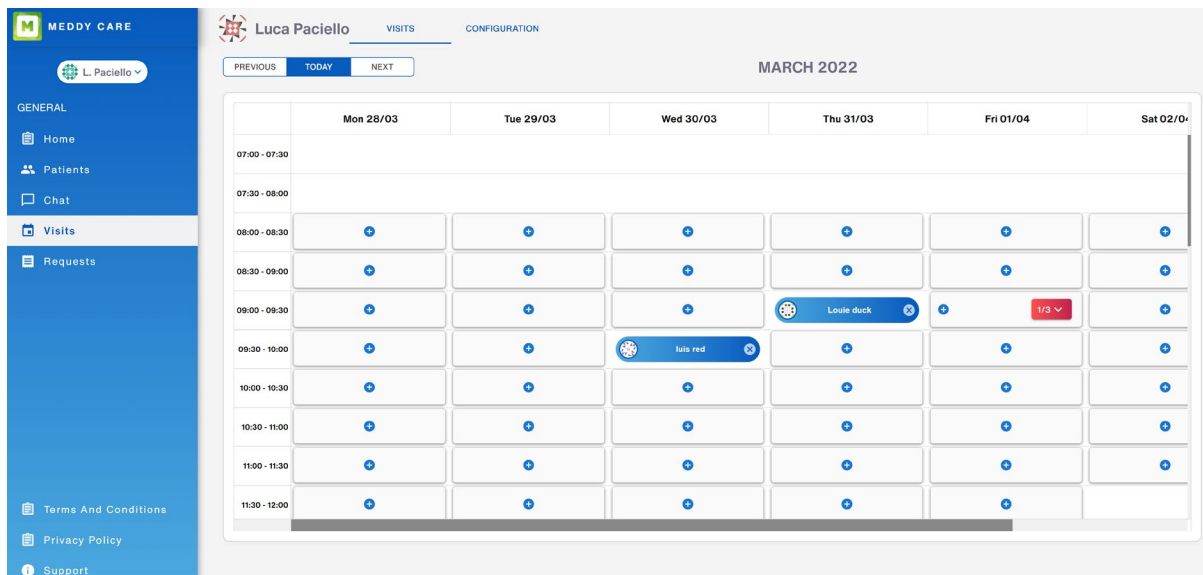2. CONFIGURATION, where the availability calendar can be defined.

4.1 Visits

The calendar is shown with a weekly view that can be navigated temporally using the "PREVIOUS", "TODAY", "NEXT" keys at the top left. On the calendar there are various time slots that can be booked for visits. If booked, the slot will show the name of the patient, otherwise it will show a button with the "+" symbol.

By clicking on the "+" symbol inside the slot, a popup will open in which the following data will be entered: the name of the patient (an automatic search will be activated from the first letters inserted to facilitate the search of the patient); pre-visit notes and video call mode for a possible remote consultation, if provided. Then press "SAVE" to complete the reservation.

<u>Professionals can book an unlimited number of visits for the same patient at the same time, while patients can book one visit at a time.</u>
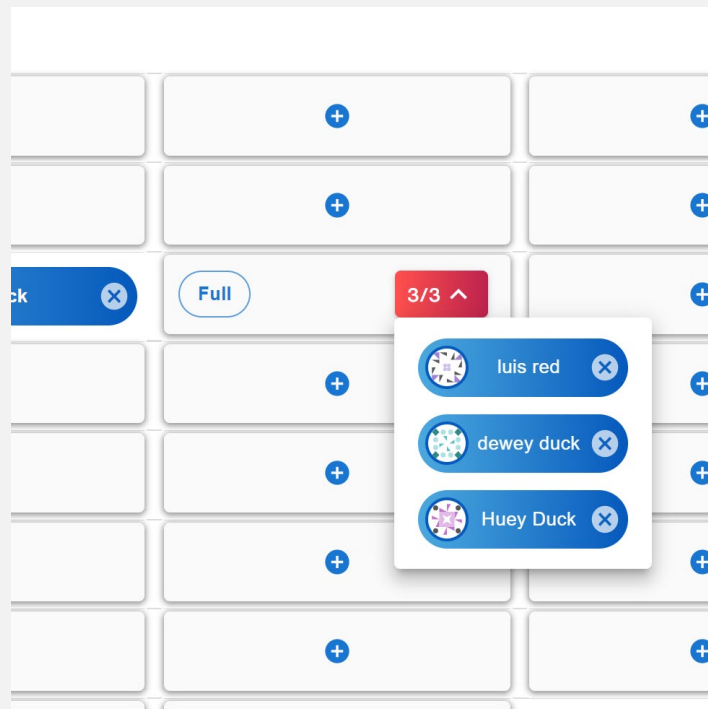

From this subsection it is also possible to delete a visit by clicking on the "x" symbol next to the patient's name and confirm the elimination.

Please note:

When the agenda is configured to make multiple slots available at the same time, the calendar view will show how many slots are still available (ex: 1/2). Just click on the arrow inside the slot to see the names of the patients and access the details.

4.2 Configuration

"Configuration" is the tool with which define availabilities with respect to a weekly calendar; these will be shown to patients through Meddy Care. In this section it is possible to view the list of agendas divided into "Actual", "Past" and "Archived" according to their status. A new agenda can also be created from this screen.

4.2.1 Create a new agenda
By pressing the "CREATE NEW" button, it is possible to create a new agenda by entering the following information:

- Starting date
- Ending date

- Average duration of visits in minutes
- Number of future days, with respect to the date of viewing, on which the patient can book a visit (this value will prevent the patient from booking too early, the calendar will show only the number of future days indicated in relation to today's date).
- Days of visit, with the definition of one or more time slots customizable day by day
- Number of persons: maximum number of persons who can book simultaneously in the same slot
- Advance booking time: number of days and maximum time for which the user can book in advance. For example, by selecting 1 on the number of days and 10:00 as the maximum time, it will be possible to book by 10:00 for the next day, after that time it will be possible to book only slots starting from the day after.
- Enabling teleconference visits (this option will allow patients to independently select the video call visit mode during the booking)
- Add closing days or periods (the visit calendar will not show the slots intended by that agenda as closing days).

> Please note:
>
> Multiple agendas can be created on the same dates and therefore potentially on the same times. In that case the calendar will show multiple slots for the same time interval.

4.2.2 Actual agendas

These are the agendas currently in force. For "actual agendas", the following actions are possible:

- VIEW: the current agenda is displayed and can be edit. Note: if the agenda is modified, a new one is created by storing the current one (booked visits are kept anyway);
- DELETE: Archive the current agenda (booked visits are kept anyway).

4.2.3 Past agendas

When the current day exceeds the end date of an agenda, the system automatically moves the agenda to "past agendas". The following actions are possible:

- VIEW: the past agenda is displayed and can be edit. If the end date is modified by bringing it after the current date, the agenda will appear among the "Current" ones, otherwise it will remain among the "Past" ones.

4.2.4 Archived agendas

When an agenda is deleted or modified it is moved to the "Archived". The following actions are possible:

- VIEW: the archived agenda is displayed and can be edit. If the agenda is modified, based on the start and end date set with respect to the current date, the agenda will appear among the "Current" ones or the "Past" ones.

5. Requests

The "Requests" section allows the management of all prescriptions related to the patients. These can be entered as "REQUEST" by patients or directly by the professional. The prescriptions can belong to three types:

- Chronic therapy
- Drug prescription
- Medical referral (prescription for examination or visit)

According to their status, requests are grouped into 3 different lists:

- PENDING: requests that come directly from patients through Meddy Care. The professional can accept it (by processing the response) or reject it.
- PROCESSED: requests from the patient that the professional has accepted (then processed), and those entered directly by the professional via the "CREATE NEW REQUEST" button and completed.
- DRAFT: requests entered via the "CREATE NEW REQUEST" button and not completed (exit via back arrow or menu), they can be deleted or displayed in order to complete it.

Inserting a new request is possible by pressing the button "CREATE NEW REQUEST" and entering the following information:

1. Detail
   - Medication name (or visit/examination)
   - Exemption number
   - Notes
2. Attachments for the patient: here it is possible to upload attachments in pdf and photos, which will be attached to the response and which the patient can retrieve by accessing Meddy Care.

6. Chat

This section allows to chat with patients. The screen area consists of two parts: a part on the left containing the list of chats already made and a part on the right with the content of the selected chat.

By clicking on "NEW CHAT" a popup opens with the list of patients, which can be filtered by name. Click on the desired patient to start the chat.

To attach a file, the professional need to select the file and then write a message; it is not possible to send a chat message with only the attachment without text

There is also a section dedicated to the staff of the office, currently not licensed.

7. Support

In this section, in addition to this manual, there are also contacts for assistance and commercial contacts to receive information on additional functionalities.