Clinician Handbook

pep® Health

Become a leader in patient-centric care with smart patient communications

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Introducing PEP Health

How to Use the Dashboard

Promote Patient Engagement and Optimal Patient Health

With PEP Health, you can improve the patient experience by delivering personalised communications that align with best practice clinical pathways.

Achieve higher levels of communication while reducing your workload with PEP Health's automated system.

The PEP Health solution also provides the ability to implement a patient feedback loop. Collect and review important patient health data, patient reported outcome measures, and more.

Empower Your Patients

Engage your patients throughout every stage of their health journey, across the care continuum.

Leverage Patient Feedback

Enable patients to fill out forms, report on their progress and complete questionnaires.

Improve Clinical Efficiency

Remove silos and the potential for communication breakdowns with a digital platform.

Supporting the Patient Journey

Home

Patient Anxiety

Patients can feel anxious and overwhelmed by their symptoms and the abundance of available health information.

With PEP Health

Keep patients engaged and informed with personalised information.

Diagnosis

Administrative Strain

Prioritising patients can be complex. Underprepared patients can be a drain on precious administrative resources.

With PEP Health

Automate the triage process with smart forms. Schedule patient reminders and to-do lists.

Treatment

Patient Preparedness

Patient's can easily forget important dates, as well as admission and procedure details with treatment information.

With PEP Health

Staged delivery of information via the app ensures the patient is fully prepared for treatment.

Recovery

Patient Adherence

Patients can easily become non-adherent to essential discharge and medication plans.

With PEP Health

Clinical staff can receive PROMs and monitor patient recovery.

What is a Patient Pathway?

Template Pathways, Personalised Engagements

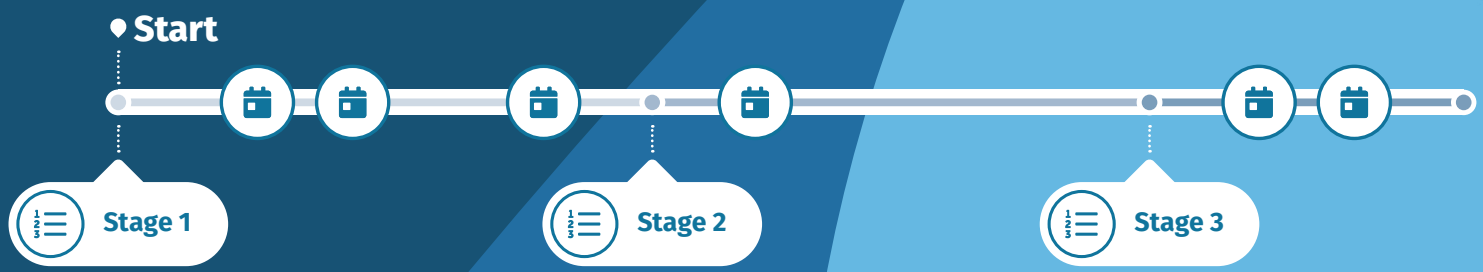
Support a patient group with a structured and automated clinical pathway that engages with individual patients in a personalised way. This is achieved through the following:

Index Events trigger patient engagements and other clinical events in relation to a specific day. The Index Event can trigger engagements on, before or after the date.

Examples: Surgery date, Appointment date, Discharge date

Stages trigger patient engagements and other clinical events in relation to a defined phase of a patient journey. The transition from one stage to the next can be triggered manually or by an Index Event.

Examples: Pre-Operation, Operation, Recovery



Pathway Content Types

Media

Educate and Inform

Documents Similar to a web page, documents allow you to educate patients with written content.

Videos Provide patients with a visual experience through a Youtube linked in-app video.

Notifications

Notify and Highlight

Messages Convey general information directly to the patient in the form of push notifications.

Reminders Ensure patients are reminded of key information or events, such as appointments or preparing for a test.

Alerts Convey critical information in a clear and distinguishable way in the app.

Data Collection

Collect Information and Track Progress

Forms Useful for Patient-Reported Outcome Measures (PROMs) or Patient-Reported Experience Measures (PREMs).

Tasks Provide patients with checklists to ensure they keep track of their To Do list. This is helpful for appointments.

Questionnaires Useful when assessing the progress of a patient's recovery after a procedure.

Method of Delivery

Automate dynamic content triggering

Rules Programmatically trigger content in relation to the number of days to the commencement of a stage, an index event occurring, or a form submission. Rules and content can be used across multiple pathways.

Non-aligned Rules Trigger content manually (non-aligned to a Stage or Index Event). This enables clinical staff to feature content on an ad-hoc basis.

Pathway Structure

Stages

Stage Transitions occur at non-fixed intervals based on a patient's circumstances

Stage Transitions can trigger **Rules**

Rules can trigger different **Content**

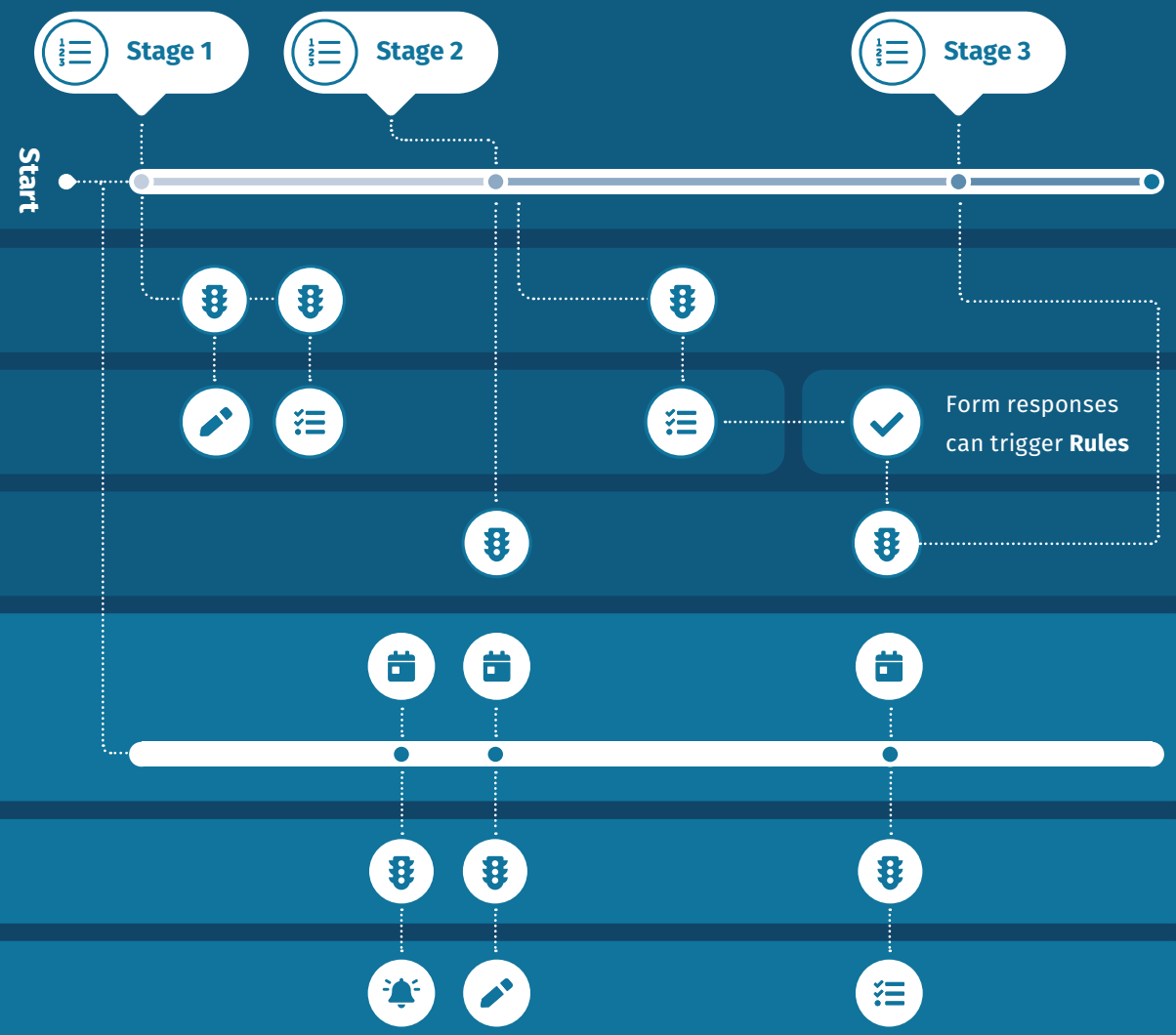
Rules can also trigger **Stage Transitions**

Index Events

Index Events are fixed to a date in time

Index Events can trigger **Rules**

Rules can trigger different **Content**



Non-aligned

Non-aligned rules can be triggered manually, on an ad-hoc basis

Follow Sarah on Her Patient Pathway

A pathway is divided into various stages of care. Along a pathway, content is sent to the patient using rules and index events.

Stage 1: Triage

Patient Events

Sarah is onboarded to a pathway to treat her abdominal pain.

Triage Forms

Rule: On stage transition send triage forms.

Stage Transition

Rule: On submission of triage forms transition to diagnosis stage.

Stage 2: Diagnosis

Patient Events

Sarah submits her triage forms and undergoes tests to aid diagnosis.

Form Results

Rule: After doctor consult, feature test results.

Stage 3: Pre-op

Patient Events

After GP Diagnosis, Sarah visits hospital specialist to disscuss treatment.

Stage Transition

Rule: On transition, a pre-op checklist, surgery documentation and videos are sent

Surgery Day

Using an index event the patient is sent a reminder and transitioned into the surgery stage.

Recovery Questionnaire

Rule: 3 days after stage transition, a questionnaire is sent to assess the patient.

Stage 4: Surgery

Patient Events

Surgery day has arrived and Sarah feels prepared and supported.

How to Use the Dashboard

Inviting a Patient

For a patient to use the mobile app they must be invited by a dashboard user.

Go to page 20 for instructions →

Getting Started

To start using the dashboard you need to set up your user account.

Go to page 16 for instructions →

Patient Management

Assign and edit a patient's pathway to facilitate optimal care and communication.

Go to page 24 for instructions →

Reviewing Results

Review the results of patient forms over time, in order to observe patterns in their health.

Go to page 36 for instructions →

Sending a Message

Send a message to specific patients on an ad-hoc basis with attached content.

Go to page 32 for instructions →

Getting Started

01

Invite Email

To access the PEP Health Dashboard you will need a registration invite from your organisation's administrator.

1. Once this has been sent, access your email and find the email labelled **PEP Health Registration**.

2. Open the email and **click on the link** to start the PEP Health registration process.

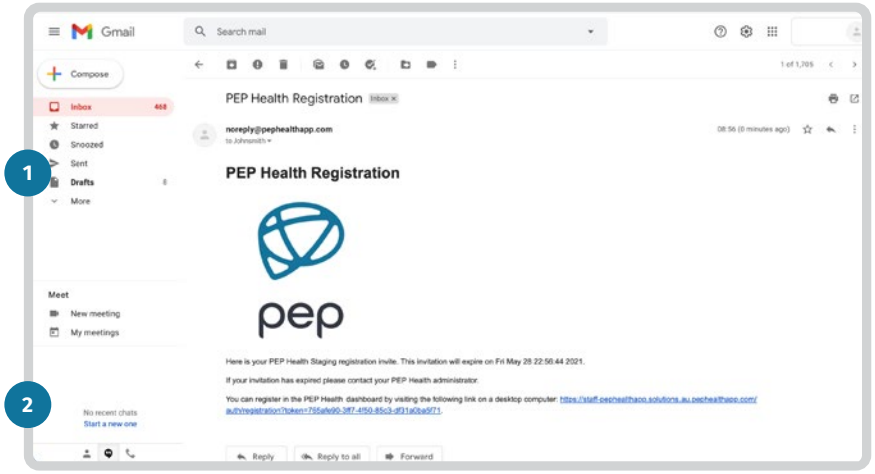


Figure 1: Open your email service and look for your invite email to begin.

Registration

Follow the link from the registration email to be taken to the welcome screen of the PEP Health Dashboard.

3. Create a password for your user account. Please note, to ensure the security of your account, the password must be at least 8 characters long, have one uppercase letter, one digit, and one special character such as !,@,#,$,%.

02

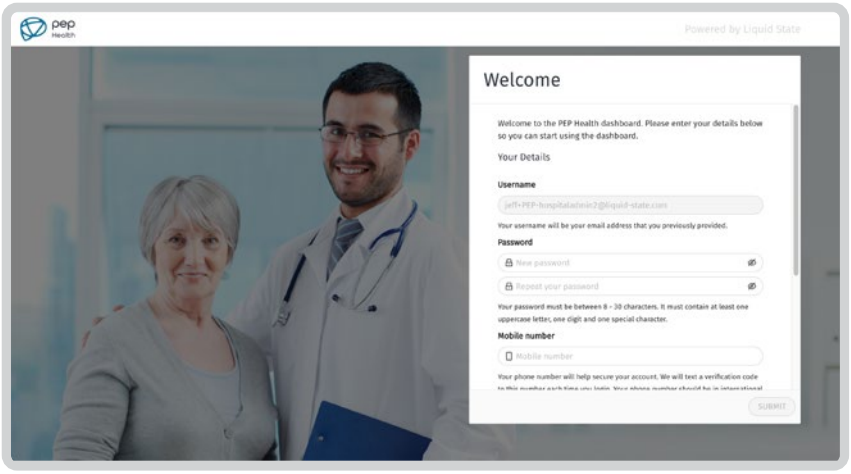


Figure 2: You may need to scroll down to view the check boxes below.

Getting Started *(Continued)*

02

Registration (Continued)

4. You'll need to **provide a mobile phone number**. This number will be used to send a verification code when you log in. Your number should be in international format.

5. Review the Privacy Policy and the Terms & Conditions.

6. Check the boxes to agree to the **Terms & Conditions** and **Privacy Policy**. Then **press Submit** to complete your account setup.

Account Setup Complete

Congratulations and welcome to the PEP Health Dashboard. For details on how to find additional support, please check the back of this booklet.

03

How to Log In

8. To log in, use the email address you provided for your account registration and the password that you entered in the previous step.

9. You will then be sent a verification code on your mobile phone, enter the code and click Submit to log in.

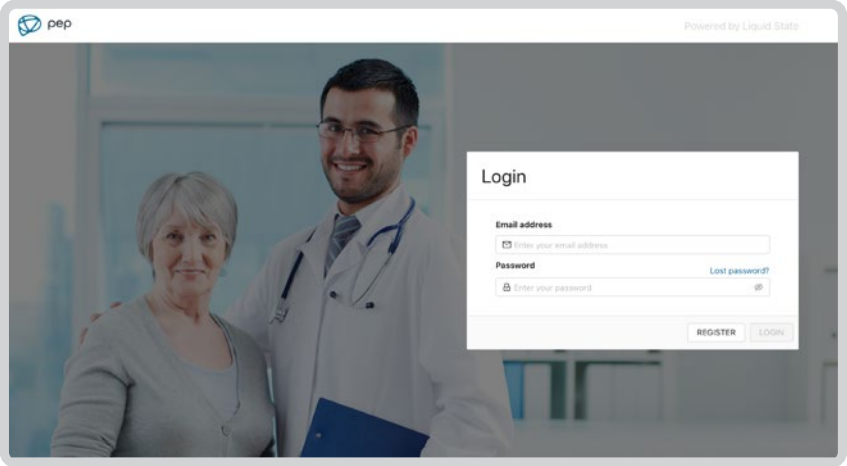


Figure 3: The Log in screen.

Inviting a Patient

01

Basic Details

To allow a patient to access the PEP Health mobile app they must first be sent an invite code by a dashboard user.

1. Click **Patients** on the left hand menu, then click **New Patient** in the top right.

2. Fill in the patient's invite details. Please note, these fields have a red *, which means they are mandatory.

3. Press the **blue right arrow** button to continue.

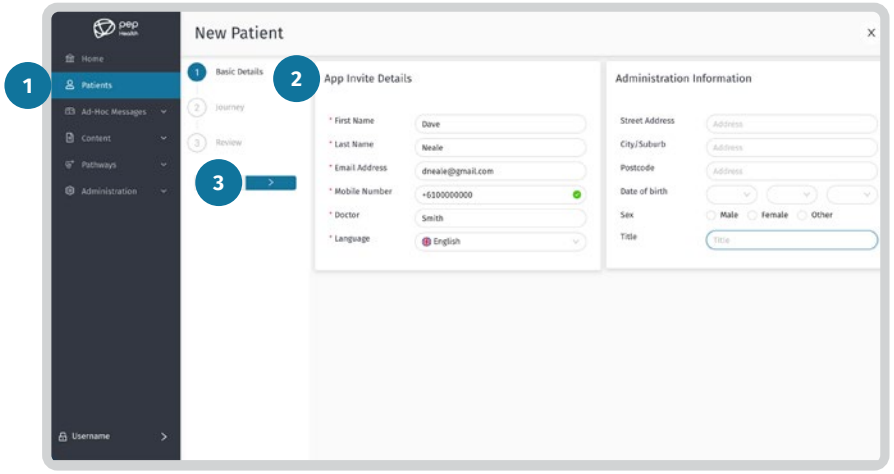


Figure 4: The basic details screen for inviting a new patient.

02

Journey

4. To start sending content to the patient relevant to their condition, a pathway must be added. To do this, click **+ Add procedure** (see Figure 5).

5. Choose one or more pathways from the list by clicking the check boxes, then click **Add** (see Figure 6).

6. If you need to review the chosen pathway before continuing, click ↗ under details (see Figure 5).

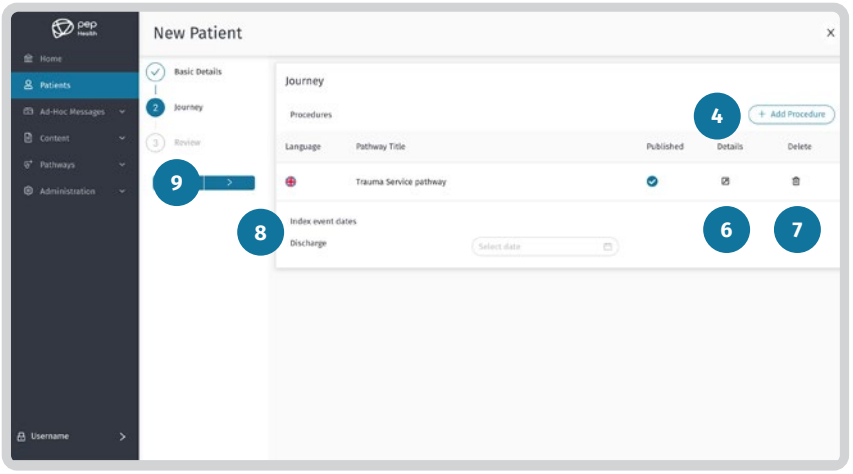


Figure 5: The list of pathways assigned to the patient.

Inviting a Patient *(Continued)*

02

Journey (Continued)

7. To remove a pathway click 🗑 under Delete (see Figure 5).

8. If the chosen pathways have associated Index Events, you can input their dates in the fields provided (see Figure 5).

9. Press the > **blue right arrow** again to continue (see Figure 5).

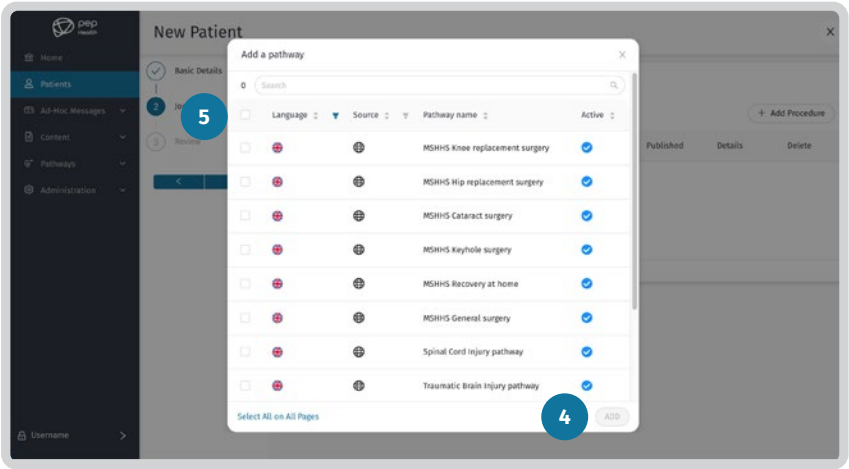


Figure 6: Add a pathway list.

Review

10. Review the details of the patient invite to ensure that everything is correct. To make changes in a previous step, press the < **blue left arrow**.

11. When you have completed the New Patient information, click the 💾 **save button** (see Figure 7).

03

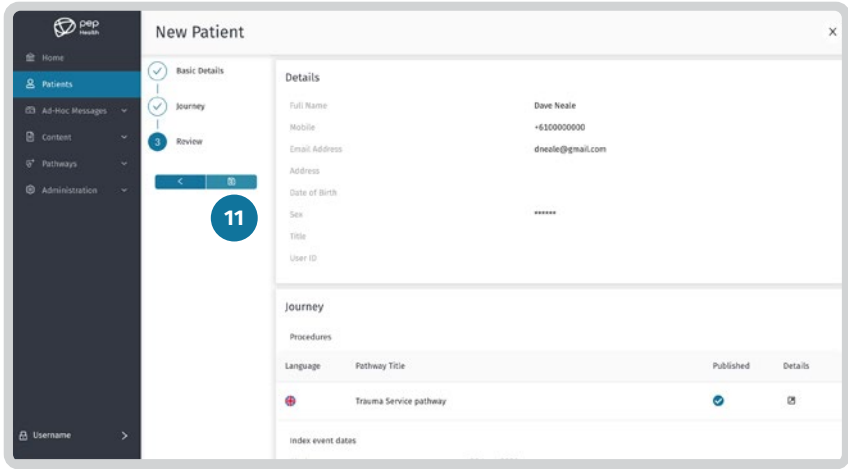


Figure 7: Review the patient invite.

Patient Management

Introduction

The patient details screen allows you to manage your patient's details, pathways, view their results and more. To access it, click on **Patients** in the left hand menu, then click on a **patient's name** in the list.

Below is an outline of each of the main areas within the patient details screen:

Overview View and edit a patient's details.

Results View form results or create new form submissions on a patient's behalf.

Journey Manage key dates and current pathways assigned to a patient.

Pathways Transition patients to the next stage of their pathway or trigger non-aligned Stage rules.

App Details Deactivate or activate access to the app for a patient or review a patient's acceptance history for the app's terms and conditions and privacy policy.

Overview

The overview screen allows a dashboard user to view or edit a patient's app invite information and administration information. To edit a patient's details click the **Edit button** in the top right of the screen. When you have finished making changes, click the **Save button**.

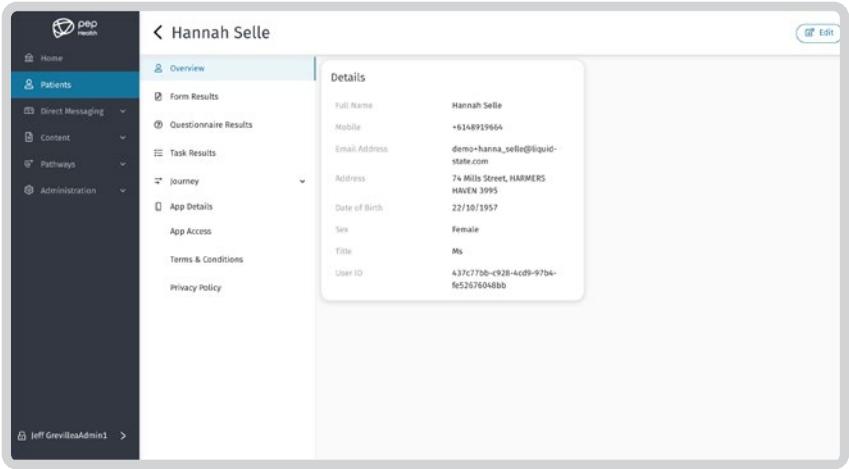


Figure 8: The Overview screen allows you to view and edit patient details.

Patient Management

Journey

The Journey tab provides a high level view of a patient's activities. View and edit Index Events, and scroll through a chronological timeline of patient and pathway-driven events in the app.

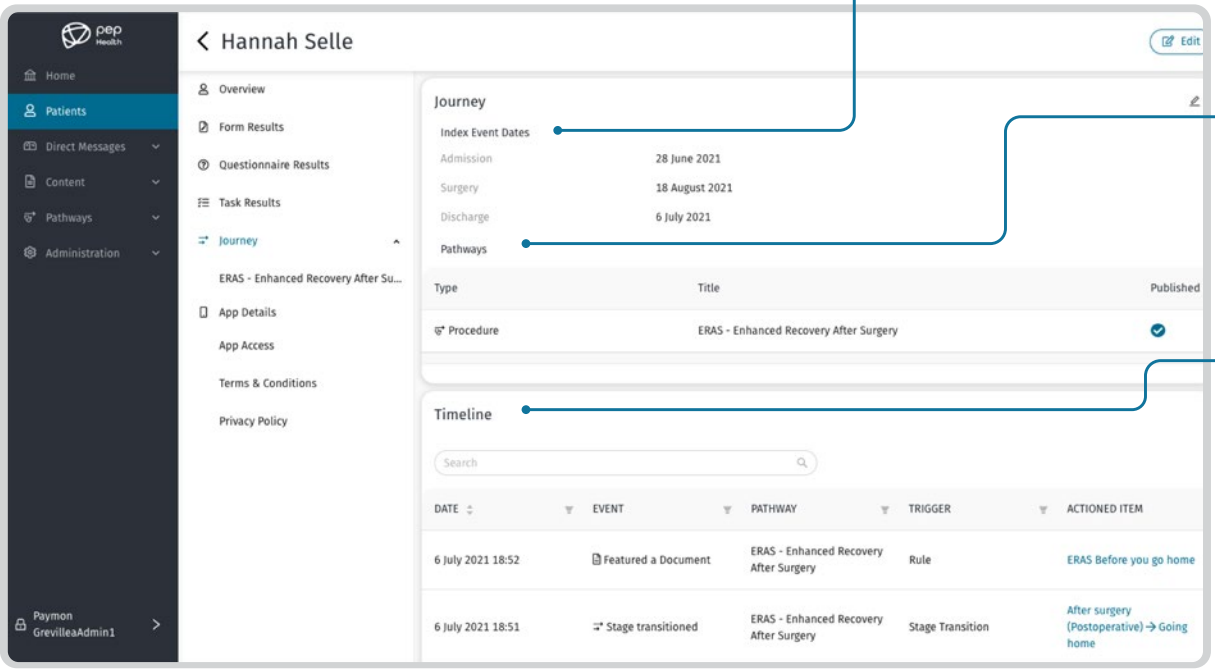


Figure 9: The Edit Journey screen.

Index Events

Define a patient's Index Events. This triggers events in the patient app. The date can be defined and changed at any time.

Pathways

To view all rules and content associated with a specific Pathway, select a pathway from the list.

Timeline

All patient events triggered by either a pathway or ad-hoc actions are compliled chronologically in the timeline.

Patient Management

Edit Journey

To manage a patient's pathways, click the **Edit button** to make changes, then click **Save changes** when you're done.

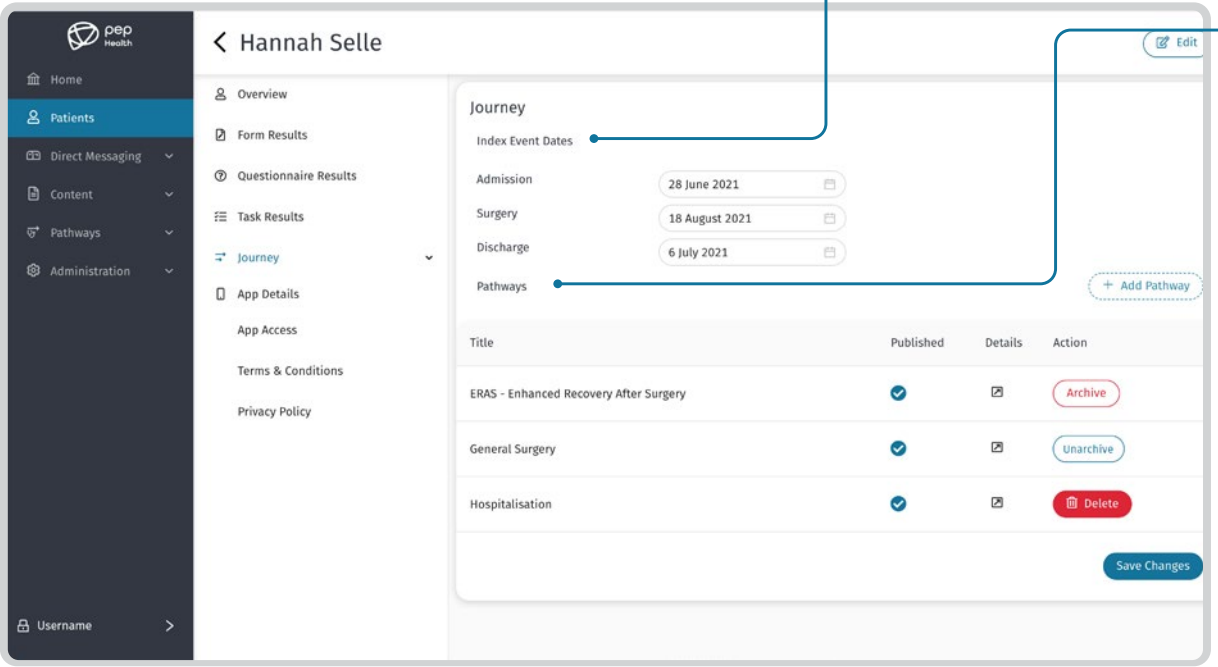


Figure 10: The Edit Journey screen.

Index Events

Define a patient's Index Events that will trigger events in the patient app. The date can be defined and changed at any time.

Pathways

Assigning a pathway to a patient will allow them to receive content related to that pathway in the app.

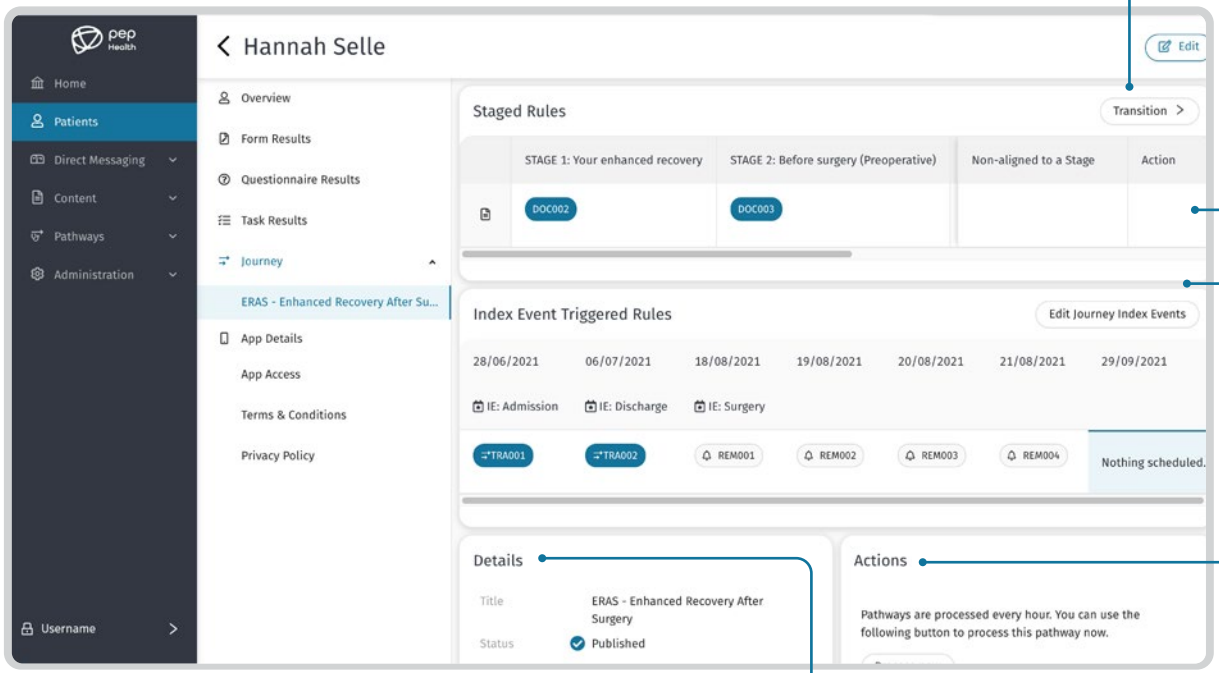
Actions Overview

+ Add Pathway	Adds pathways to a patient
Delete	Deletes a pathway after a pathway has been added but not saved.
Archive	Archiving a pathway will cease the delivery of content.
Unarchive	Unarchiving a pathway will recommence delivery of content to the patient

Patient Management

Pathways

The Pathways tab allows you to review the current status of a patient's pathway while providing access to management functions.



Transition

Manually transition a patient to the next stage of their pathway.

Trigger

Rules that are non-aligned to a stage are triggered manually when needed.

Edit Journey Index Events

Update key dates and manage assigned pathways (see page 23).

Actions

The Process now button can be used to ensure rules have been triggered.

Details

View details regarding the currently displayed pathway.

Rule Status

Blue — Rule has been triggered

Grey — Rule hasn't been triggered

Sending a Message

01

Details

Ad-hoc messages allow dashboard users to communicate directly with a patient. The content of these messages may simply be in text form, but can also contain web links and content from the dashboard's content library. To send an ad-hoc message follow the steps below:

1. Click **Ad-hoc messages** on the left hand menu, then click **send** in the top right.

2. The New Message process will be shown. Start by filling in the title of the message and the body, then choose the language.

3a. If you'd like to also have a piece of content delivered with the message, click the Actions dropdown and select Open content in app. A list will appear, allowing you to select the content to be delivered. Next, click **Add**.

3b. If you'd like to send a link, choose Open link to website from the Actions dropdown, then type in the web address in the Website Link field.

4. Once you have filled in the message details, press the **blue right arrow** button to continue.

02

Timing

5. A message can be delivered immediately or scheduled.

6. If you would like to set a particular time for delivery, choose **Schedule**, then fill in the day and time.

7. If you would like to repeat the delivery of a message, select "Repeats after start date" under Frequency.

8. Press the **blue right arrow** again to continue.

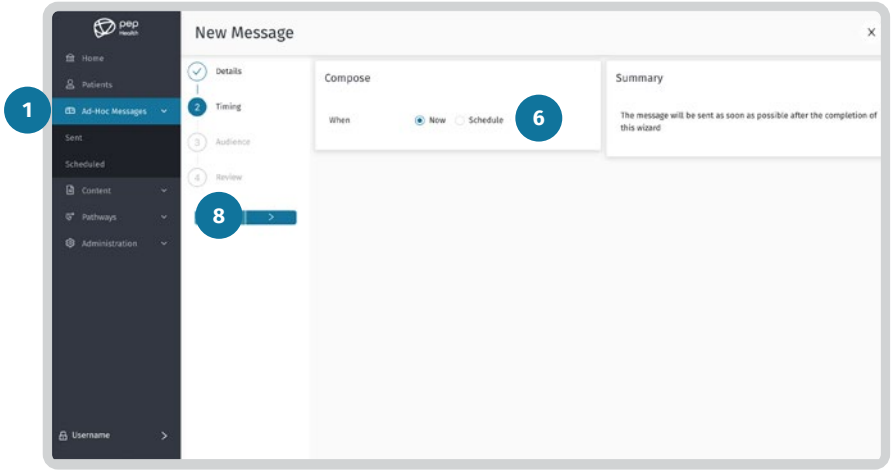


Figure 11: The New message timing screen.

Sending a Message *(Continued)*

03

Audience

9. To select which patients will receive the message, click the + **Add individual** button.

10. Click the checkbox next to one or more patients to add them to the Send to Individuals list for the message.

11. Press the > **blue right arrow** again to continue.

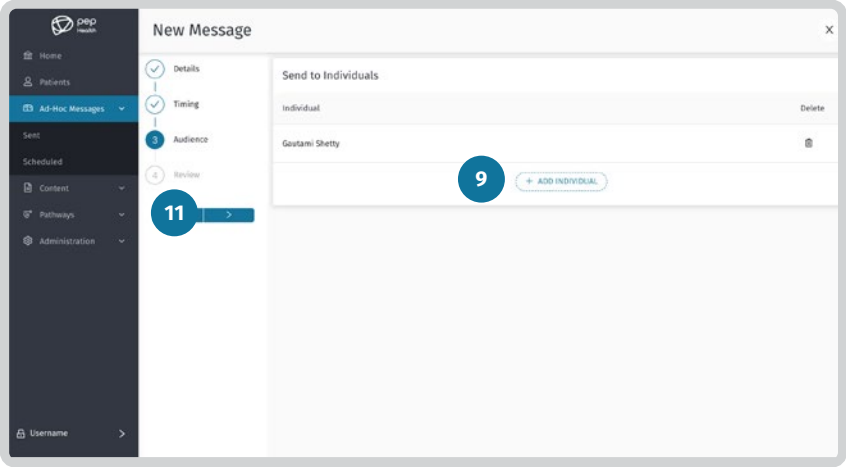


Figure 12: The New message audience screen.

Review

12. Review the details of the message to ensure that everything is correct. To make changes in a previous step, press the < **blue left arrow**.

13. When you are ready to complete the new message, click the **Save button**.

04

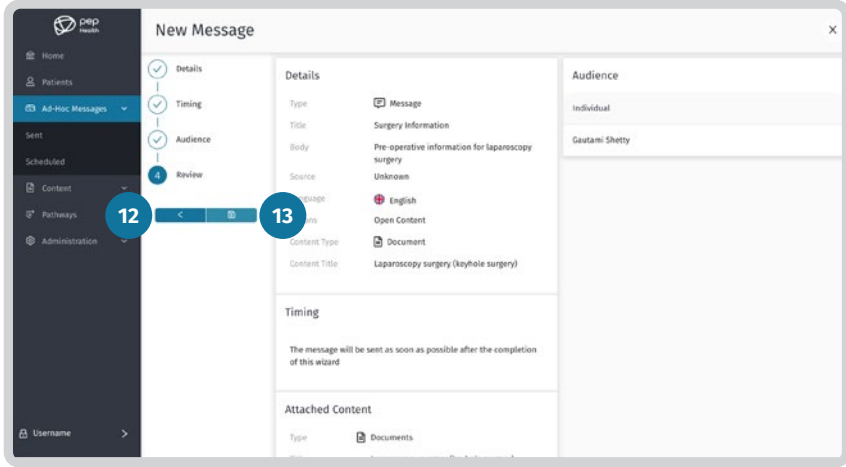


Figure 13: The New message review screen.

Reviewing Results

This section outlines how to view the results of forms submitted by patients through the app or previously by a dashboard user. You'll also learn how submit patient results on their behalf.

Reviewing Submitted Results

To view form results for a patient, follow the steps below:

1. Click **Patients** on the left hand menu, then click either **Form Results, Questionnaire Results** or **Task Results** from the secondary menu.

2. Result submissions for the selected content type will be displayed in the list. **Click on a submission to review it**.

3. The submission results screen is divided into two sections. The first section displays the details of the form used. Here you can see the forms type, title, date of creation and description. The second section displays the results of the form itself.

4. Each form may have multiple submissions. **Navigate through submission by clicking the < left and > right arrows in the top right of the screen**.

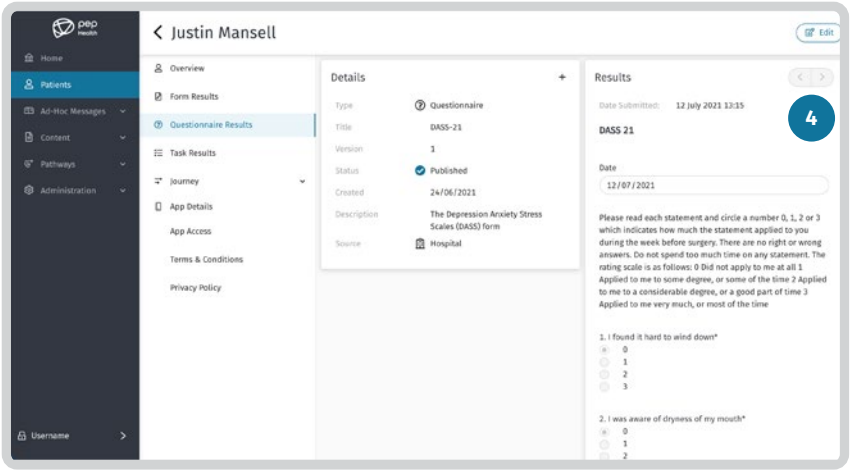


Figure 14: The Submission results screen.

Reviewing Results

Existing Form Submission

Results may be submitted by a dashboard user on a patients behalf. To make a submission for an existing form, follow the steps below.

1. Click **Patients** on the left hand menu, then click either **Form Results, Questionnaire Results** or **Task Results** from the secondary menu.

2. Result submission for the selected content type will be displayed in the list. **Click on a submission to review it**.

3. To create a submission for the form on the patient's behalf, click the **+ plus** button in the top right of the Details section. The form will then be displayed.

4. Fill in the form and then **click Submit** on the bottom right.

5. The results will now appear in the results section.

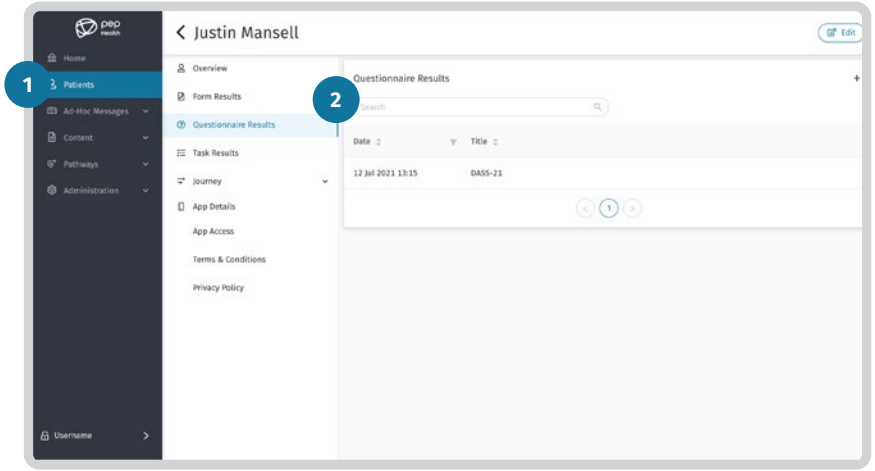


Figure 15: Navigating to results.

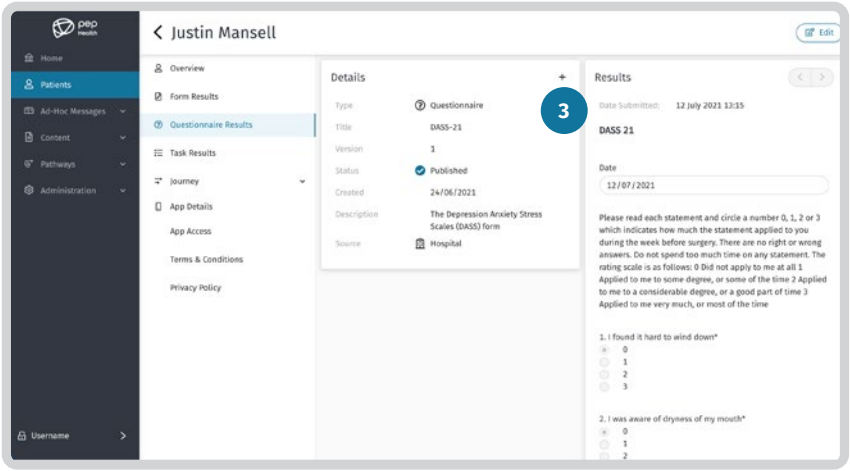


Figure 16: The Submission results screen.

Reviewing Results

New Form Submission

Results may be submitted by a dashboard user on a patient's behalf. To make a submission for a new form, follow the steps below.

1. Click **Patients** on the left hand menu, then click either **Form Results, Questionnaire Results** or **Task Results** from the secondary menu.

2. Click the **plus button** in the top right of the results list.

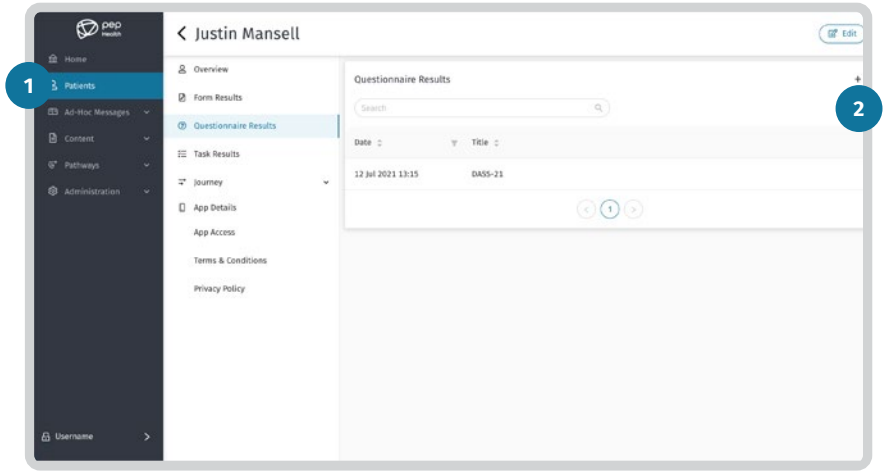


Figure 17: Adding a new form

New Form Submission (Continued)

3. Choose a form from the list using the radio buttons on the right, then **click Add**.

4. Fill in the form and then **click Submit** on the bottom right.

5. To view the results of the submission, **click on it in the results list.**

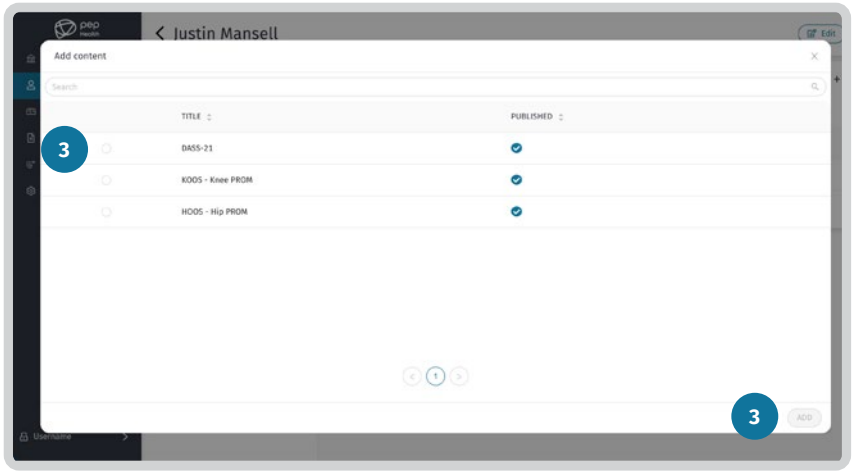


Figure 18: List of forms available to the Patient.

Support and Training

For additional support and training, please use the following resources:

PEP Health Support
https://pep.health/support/

Contact Us
support@pep.health

Training Sessions

To book a training session with our friendly support staff, please contact us via phone at (07) 3162 4126 or send us an email at support@pep.health.