



Vocera Edge Clinical Application User Guide (iOS only)

October 2021



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PatientSafe Solutions has been acquired by Vocera Communications, Inc.. In this process, PatientTouch is being renamed Vocera Edge. As part of rebranding, in all related documentation customers will see Vocera Edge in some places and PatientTouch in others. We are in the process of converting all our documentation and appreciate your patience.



Vocera Edge

Vocera Edge Application Overview

Caregivers use the PatientTouch application to perform and document clinical activities, including assigning and un-assigning patients, receiving and responding to notifications and reminders associated with assigned patients' medication or lab orders, administering medications, collecting lab orders, and collecting clinical data. Additionally, if the Communications module is enabled, caregivers can perform communication activities (such as text messaging and voice calls) directly from the application.

PatientTouch is used to:

- Verify the patient rights for safe medication administration.
- Document override reasons for variations on a medication pass.
- Document clinically relevant data such as injection sites, pain levels, etc.
- Send messages to the pharmacy.
- Print Medication Administration Records (MARs), Flowsheets and other reports.
- Enter additional clinical documentation and data regarding care interventions.
- Receive care intervention procedural care guidance and seamlessly document intervention results.
- Collaboratively communicate with other caregivers.

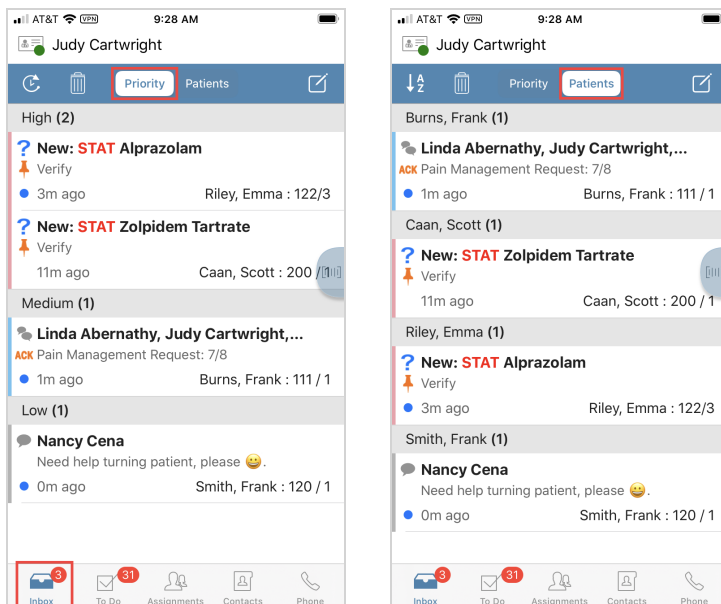
Vocera Edge User Interface Overview

The information below provides a brief overview of the main functionality of PatientTouch. Caregivers can access the following tabs located on the bottom navigation bar: **Inbox**, **To Do**, **Assignments**, **Contacts**, and **Phone**. Touch each tab to access that functionality, which then becomes highlighted when in use.

Each tab is described briefly below. Details on each of these tabs can be found in the remaining topics of this user guide.

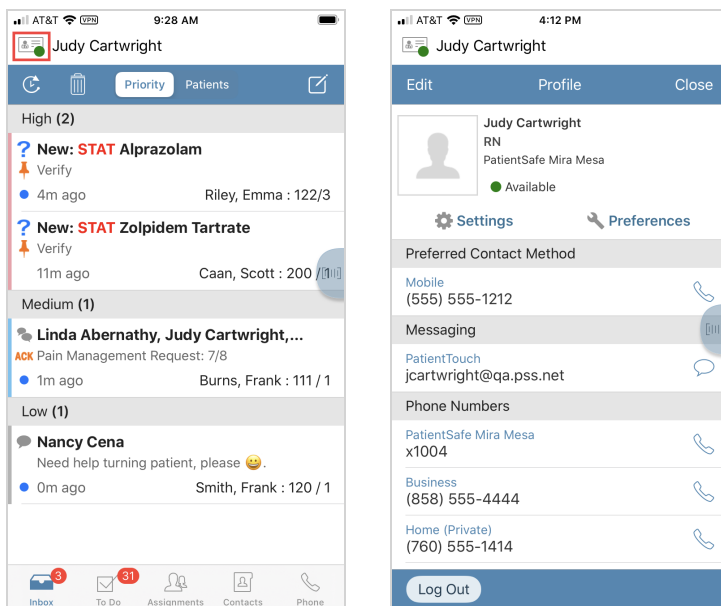
Inbox

The Inbox displays when you first log into PatientTouch. This is your "Home" screen. The Inbox provides all text messages, pages, alerts, and new order or system notifications. View the Inbox by **Priority** or **Patients**.



Profile Tab

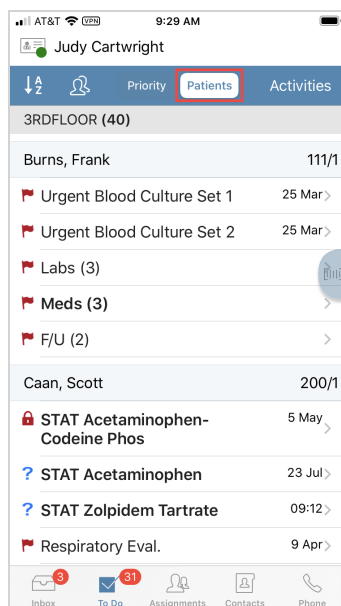
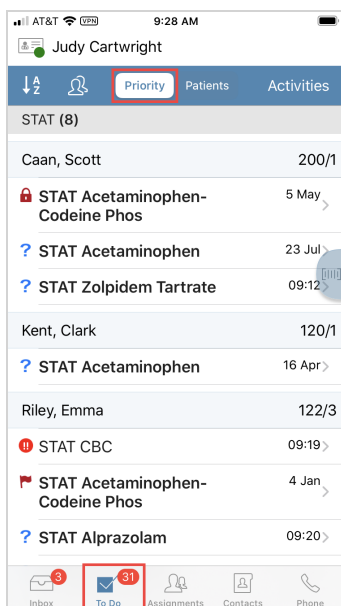
The Profile tab displays on all screens of PatientTouch. The Profile tab provides access to the caregiver's Contact Details, Preferences, and Settings.



To Do

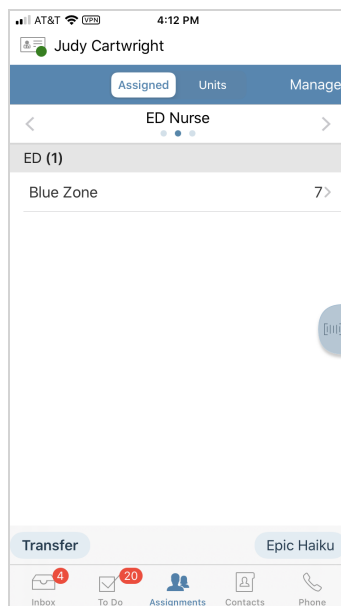
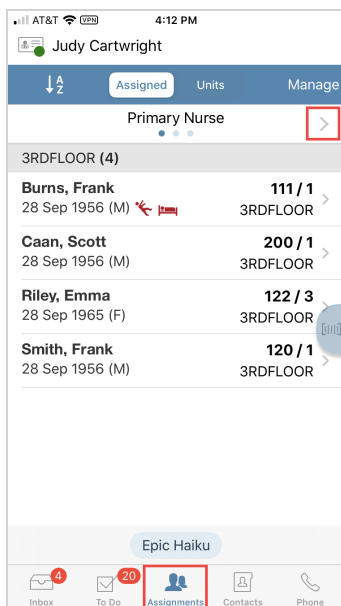
The To Do List consists of tasks related to the patient(s) for whom you are assigned as the caregiver. You will be able to view those tasks assigned directly to you as well as tasks of others who may also be providing care to the same patient(s).

View the To Do List by **Priority** or **Patients**.



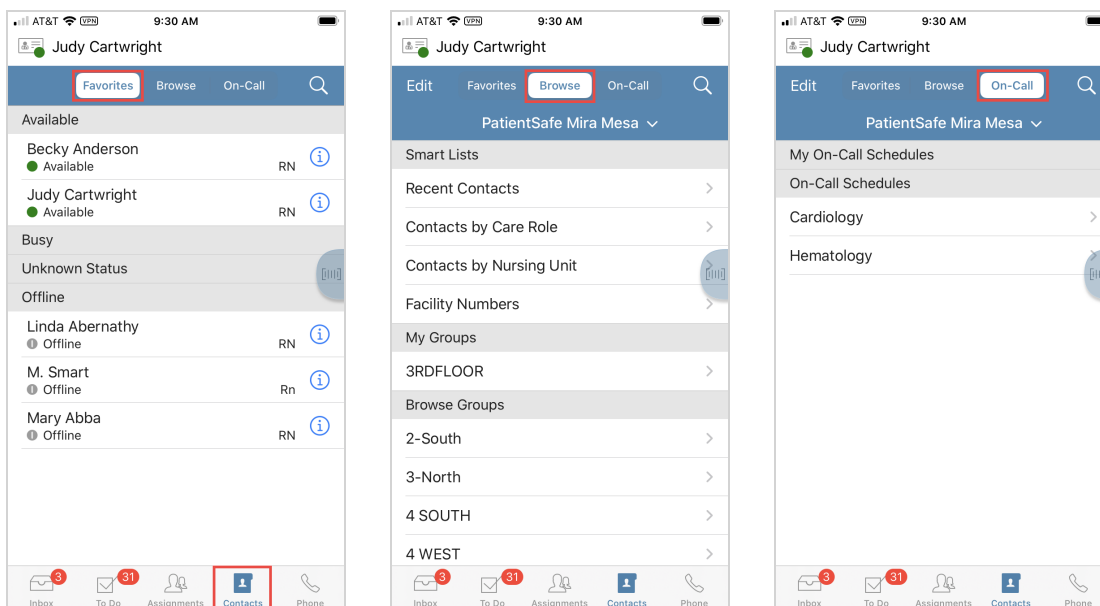
Assignments

Users with the appropriate permissions can manage their assignments using the handheld. Assign patients, locations, or nursing units.



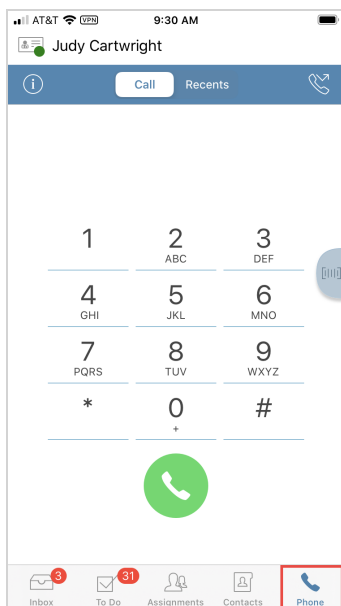
Contacts

PatientTouch allows you to add favorites to your contact list, browse for specific groups or facility numbers, and access on call schedules.



Phone

Caregivers are able to access the phone tab to place and receive calls, transfer calls to another caregiver, forward calls, or receive voicemail.



Caregiver Context and Patient Context

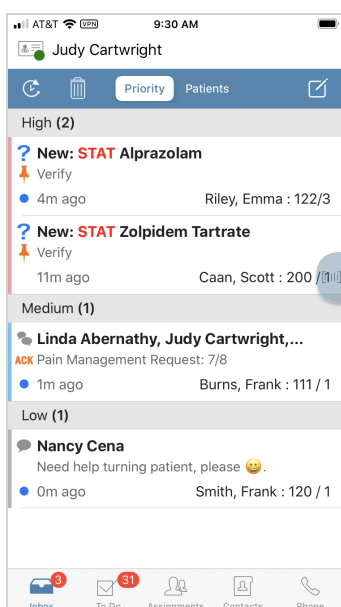
PatientTouch has two main modes: *Caregiver Context* and *Patient Context*.



- From the *Caregiver Context*, you can access the following tabs: Inbox, To Do, Assignments, Contacts, and Phone (if the Clinical Communications module is installed). While in this context, users can also scan patients, verify medication information and perform other activities.
- Once you enter the *Patient Context*, the available tabs include: Info, Meds, Care, and Labs. In the *Patient Context*, you can review patient information including demographics, diagnosis, allergies, etc. You can also access the patient's Care Team (those caregivers directly assigned to the patient), print patient-specific reports, and access mView. If you have scanned the patient, you can administer medications, document care interventions/assessments, and/or collect lab specimens.

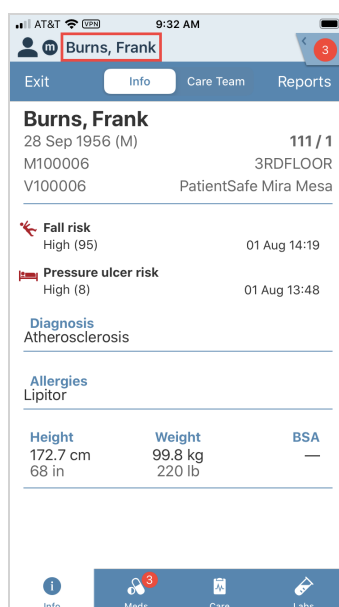


The available tabs and actions will depend on both the installed modules in your facility's PatientTouch System and your specific role(s) and privileges.



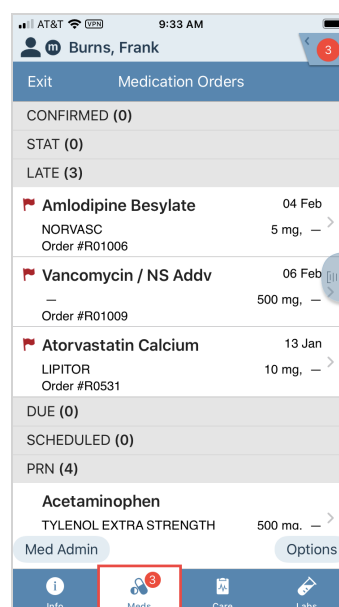
Caregiver Context

1. From any of the tabs in the Caregiver Context, scan a patient wristband. Or,
2. Touch a patient name on the Assignments tab.
3. Either action will allow you to enter the Patient Context.



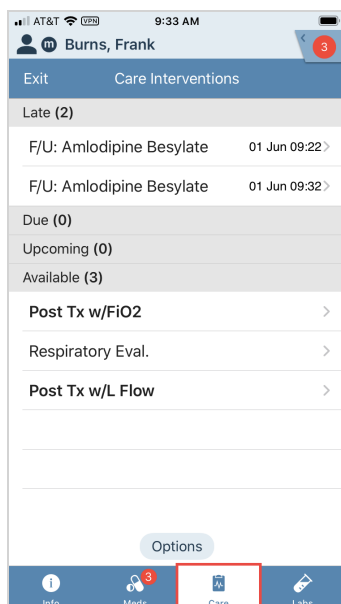
Patient Context

1. When a patient is scanned, their name displays in **bold** font. If the patient is selected, the name displays in italics.
2. The **Info** tab displays patient information such as name, MRN, risk icons, allergies, etc.
3. **Care Team** provides access to the patient's assigned care team members.



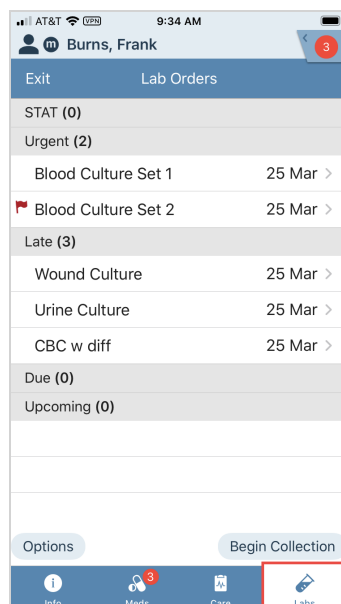
Patient Context

1. The **Meds** tab displays all active medication orders for the patient including Stat, Late, Due, Scheduled, and PRN.
2. Depending on system settings, the Meds list may also include Inactive medications.



Patient Context

1. The **Care** tab displays a list of available care interventions and follow up tasks.

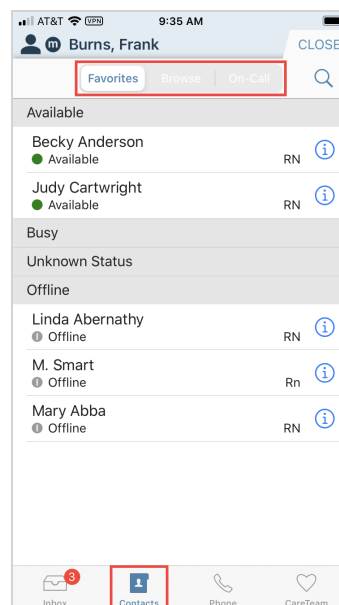
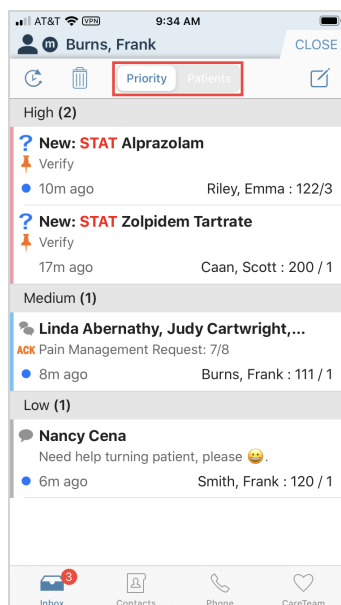
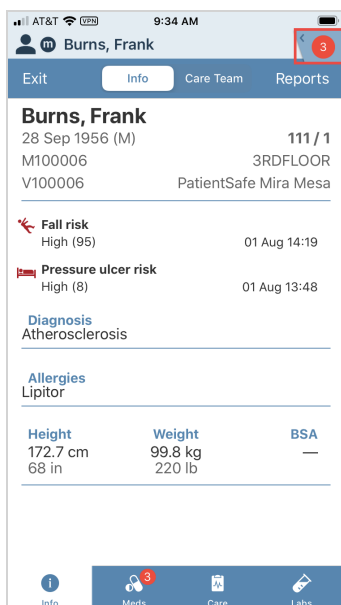


Patient Context

1. The **Labs** tab displays active lab orders for the patient.
2. Touch **Exit** to return to your assignments.

The Comms Center

In the Patient Context, the Comms Center allows caregivers to send a text message or call a physician or another caregiver without leaving the Patient Context. So if you are in a workflow and need to consult with a physician, use the Comms Center to quickly make contact.





Patient Context

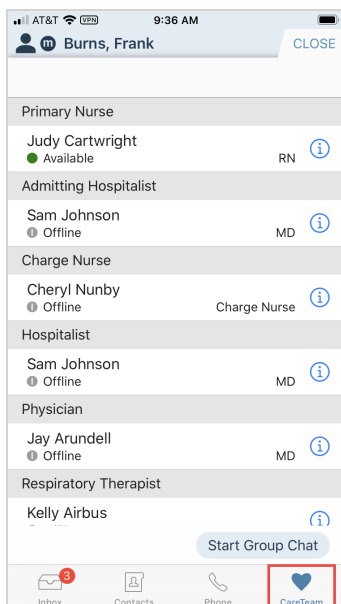
1. From the **Patient Info** screen, touch the **Comms Center** icon.

The Comms Center

2. The Comms Center overlay displays the Inbox, Contacts, Phone, and Care Team tabs.
3. Users can quickly access a variety of communication methods to contact another Care Team member without leaving the Patient Context.

The Comms Center

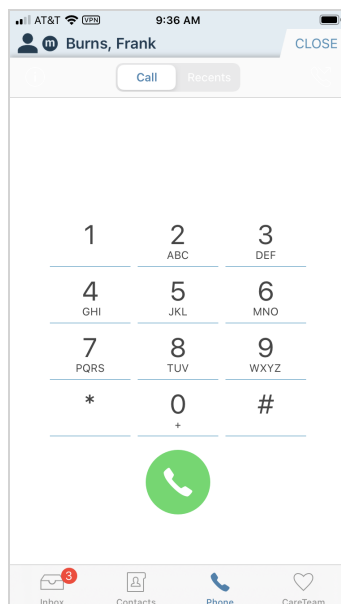
4. The **Contacts** tab displays your favorites with status indicators that let you know if they are available or offline.
5. Touch the name or **Info** (i) icon to quickly send a text message or place a call.



The Comms Center

6. The **Care Team** tab displays other members of the patient's care team.

7. **Start Group Chat** to communicate with all care team members at the same time.



The Comms Center

8. The **Phone** tab provides quick and easy access to place a call.

Patient Safety

PatientTouch is designed to assist caregivers focus on the task at hand when dealing with patient safety. There are two main background colors to assist in this process: blue and green. The **blue screens allow users to perform daily activities** such as viewing their Inbox, accessing their To Do Task List, managing patient Assignments, and contacting fellow caregivers. You will also be able to view/access patient information (demographics, mView, medications, interventions, labs, etc.). These activities don't have immediate patient safety implications.

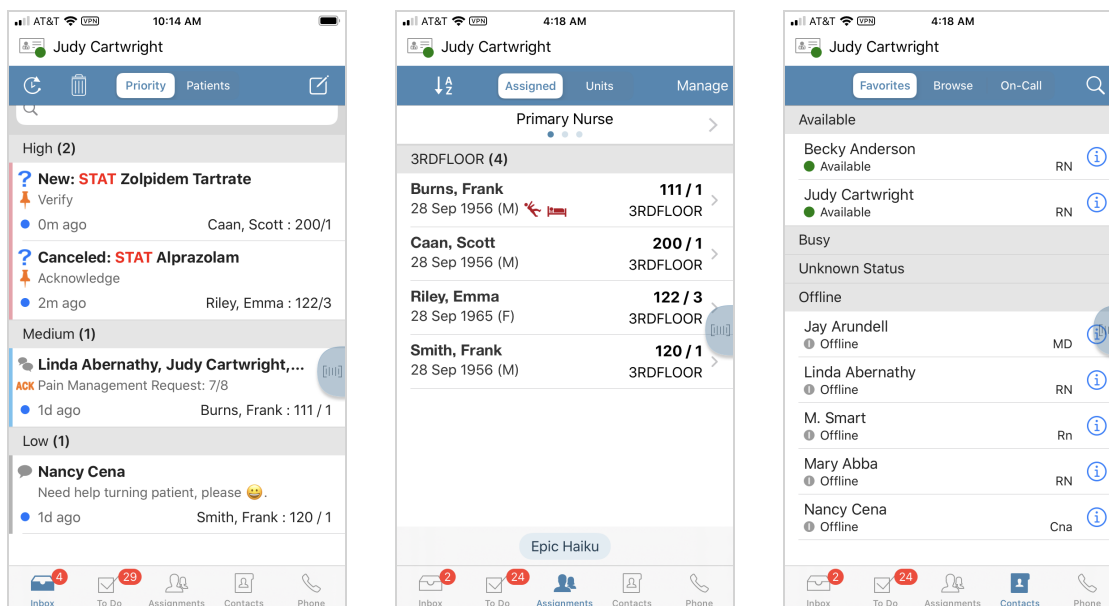
However, once you enter into an actual patient-related workflow (administering medications, documenting interventions/assessments, collecting specimens, etc.) these activities may have



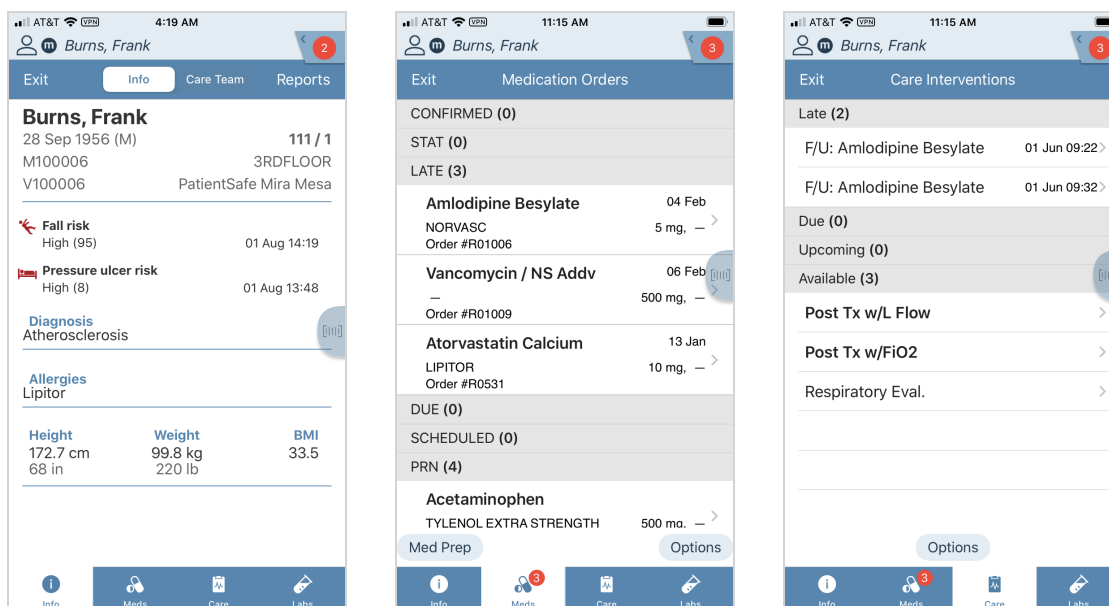
immediate impact on patient safety. The background color of these screens is **green** and they are **designed to isolate the caregiver's focus to the task at hand**. These screens are called Clinical Workflow screens.

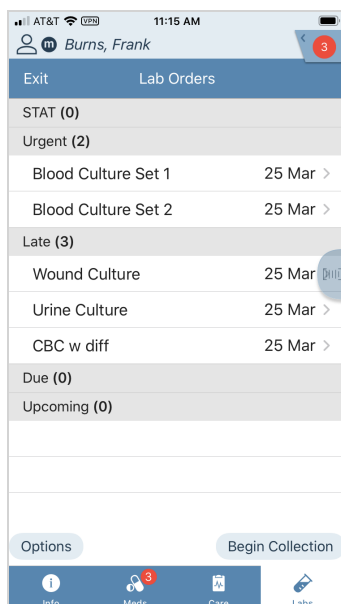
Blue Screens

Sample blue screens are provided below. Blue screens allow access to activities such as the Inbox, To Do, Assignments, Contacts, and Phone that don't have immediate patient safety implications.



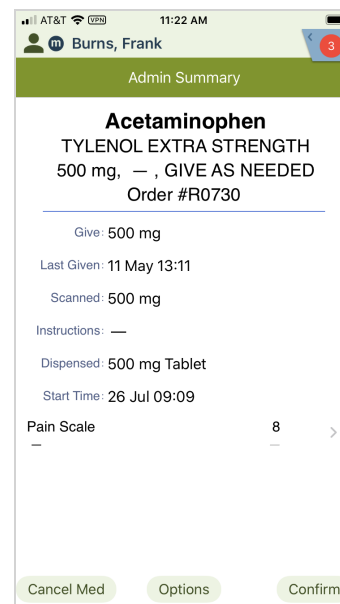
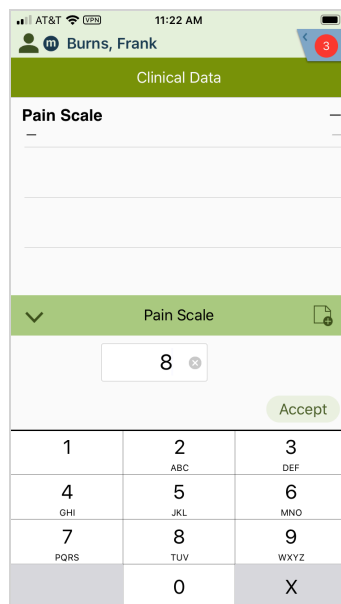
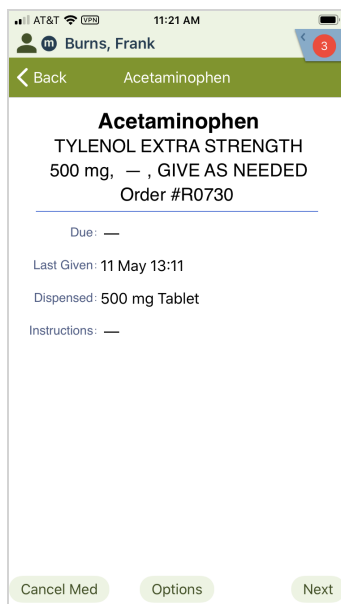
Blue screens also display when first entering the Patient Context: Info, Meds, Care, and Labs tabs.





Green Screens - Clinical Workflow Screens

You are in a Clinical Workflow when you begin administering meds, documenting care interventions or collecting lab specimens. These tasks may have an immediate impact on patient safety. Therefore, your communication status will automatically change to “busy”. Once you scan your badge to confirm and document the information, you exit the workflow(s) and your status will return to “available”.



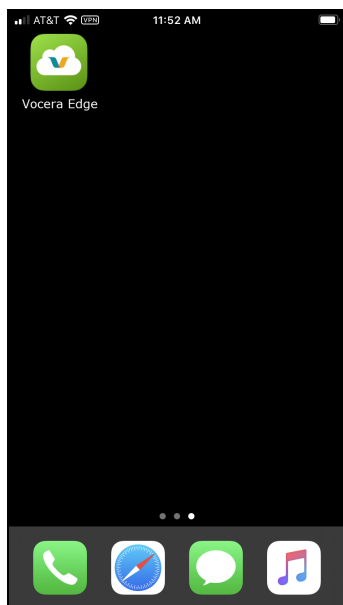
Logging In

Vocera Edge allows you to log into the application using one of the following methods: scanning your badge, manually entering your user name and password, or SAML Integration. Each of these methods are described in

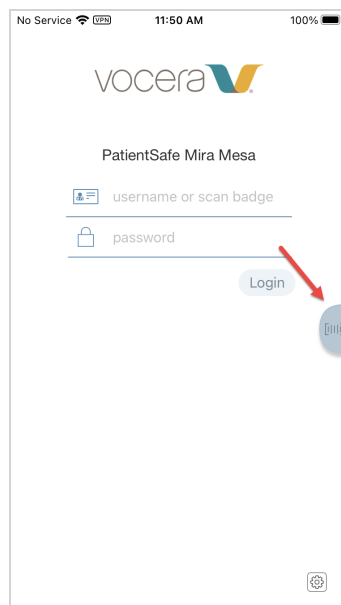
this topic and the next topic.

Scanning Your Badge

Use the instructions below to log in with Softscan.



1. Touch the Vocera Edge application icon.



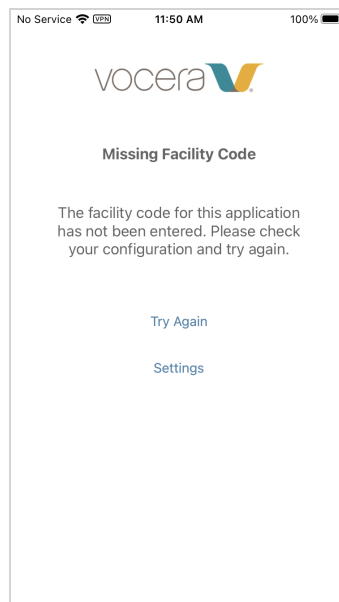
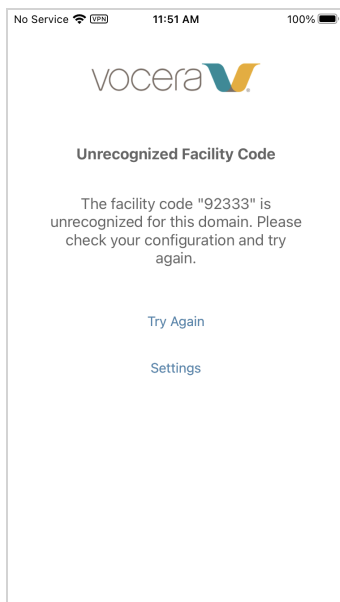
2. Touch the Softscan button to scan your badge.



3. Place your badge in the camera viewfinder. When a check mark displays the application automatically advances to the next screen.

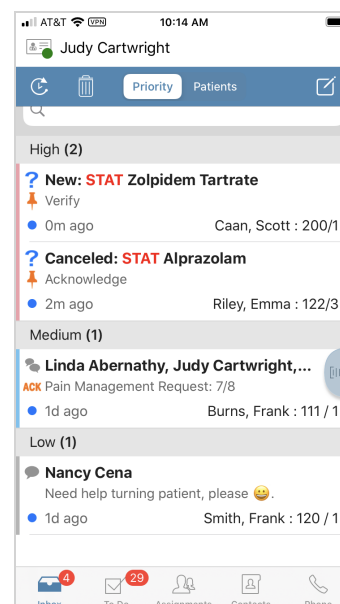
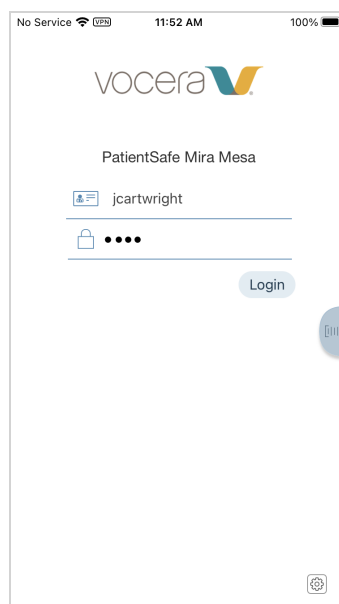
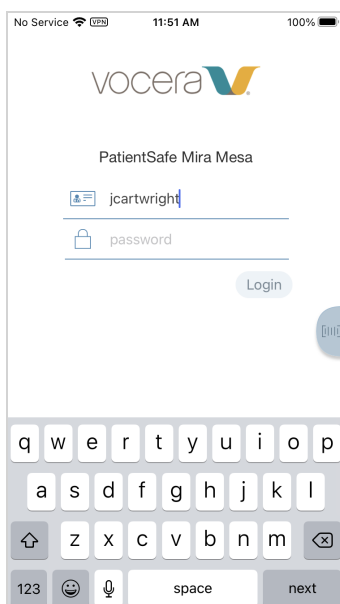
Missing or Incorrect Facility Code

If you attempt to log in and receive one of the following messages, contact your system administrator to enter the correct facility code.



Manually Entering Your User Name and Password

It may be easier or faster for some caregivers to manually enter their user name and password vs. scanning their badge. PatientTouch allows you the option to manually enter your login information.



1. Type in your user name in the user name field.

2. Enter your password in the password field.

3. Touch Go or Login.

4. View your Inbox messages.



Security Assertion Mark Up Language (SAML) Integration

SAML Integration is for hospitals that want to use a third party Multi-Factor Authentication (MFA) system to ensure a safer and more secure log in. SAML Integration may be used by internal hospital employees (Internal Users), or, users external to the hospital network (External Users).



Users with SAML Integration configured cannot scan barcodes or enter barcode information to log in.



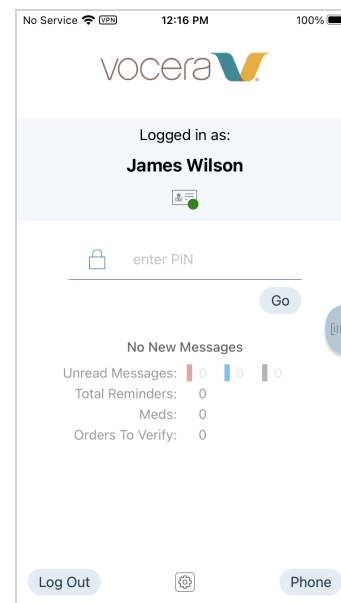
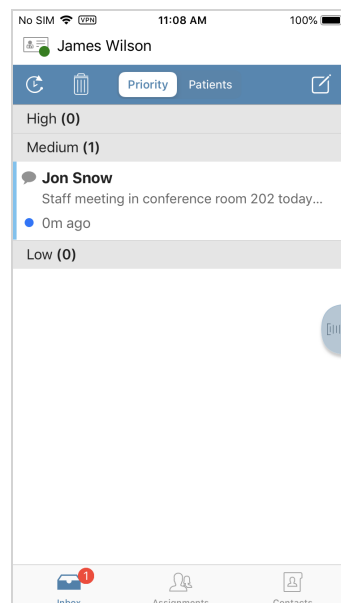
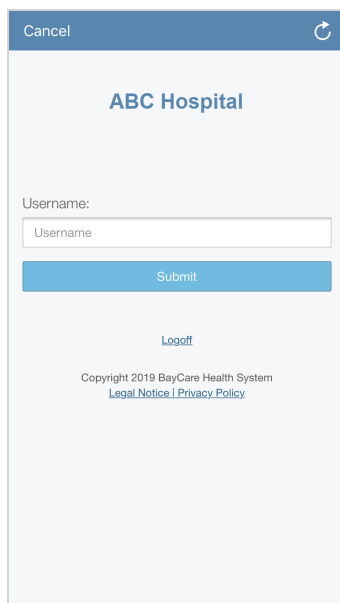
SAML Integration can be enabled/disabled globally in Enterprise Manager once initially configured.

Please follow the instructions below to log in using SAML Integration.

External Users

Users who are on a non-hospital owned device or are outside of the hospital's internal network, will see a customized MFA/SAML login screen asking for your log in information. Depending on the application selected by each hospital, these screens will vary in appearance and functionality.

A sample screen is provided below. External users would enter their username and password to get access to PatientTouch. And some facilities may ask for an additional multi-factor authentication code



1. Depending on the hospital's security policy, each MFL/SAML login screen will differ.

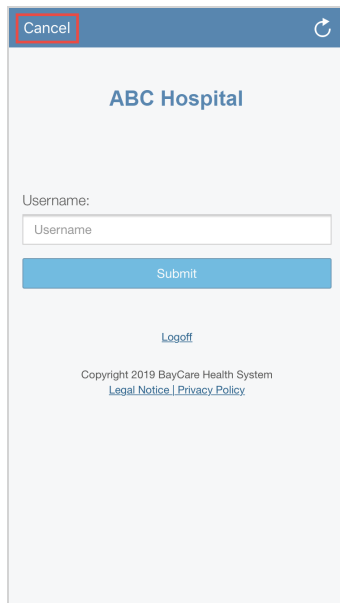
2. You may be asked to enter your username, password, and/or an additional login code.

3. Upon logging in, the **Inbox** automatically displays with all of your important messages.

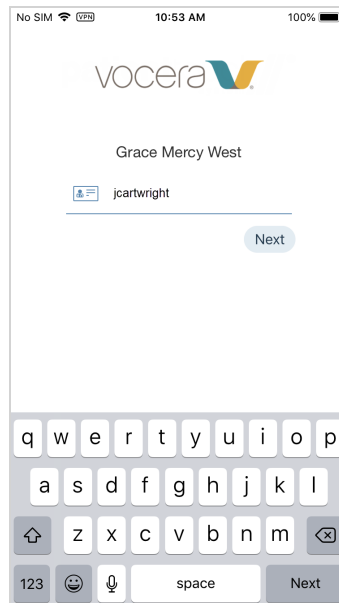
4. Scan your badge, or enter your password or PIN to reauthenticate when in **Security Mode**.

Internal Users

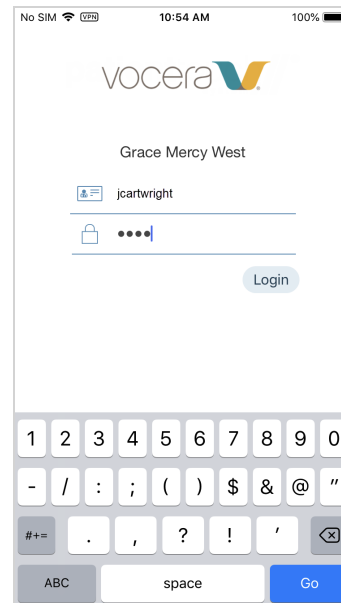
If users are internal to the hospital network or are using a hospital shared device, they will need to touch **Cancel** on the MFA/SAML screen to access the PatientTouch log in screen.



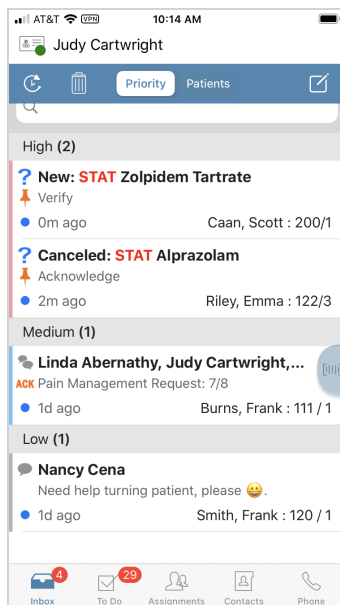
1. Touch **Cancel**.



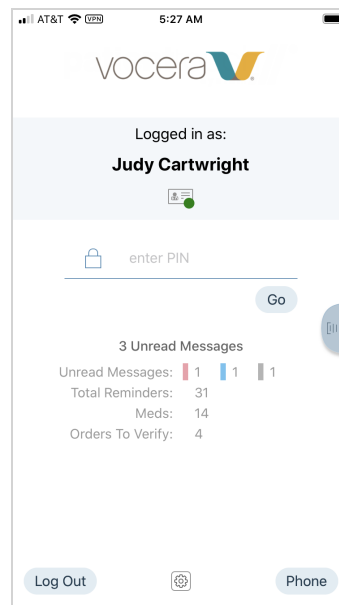
2. On the PatientTouch login screen, enter your username.
3. Touch **Next**.



4. Enter your password.
5. Touch **Login**.



6. The **Inbox** automatically displays with all of your important messages.



7. Scan your badge, or enter your password or PIN to reauthenticate when in **Security**



Mode.

Single Sign On (SSO)

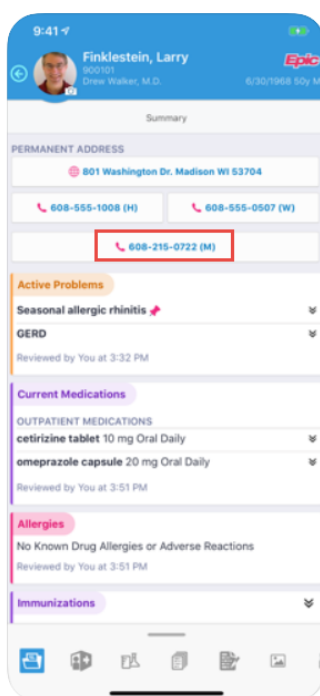
Epic

In order to work more closely with third party applications, users can now seamlessly link from a third party application (e.g. Rover or Haiku) to the PatientTouch application without having to reauthenticate. For example, caregivers can log into Rover using valid credentials, click a PatientTouch link, i.e. a phone number in the Rover app, and automatically navigate to the phone tab of PatientTouch.

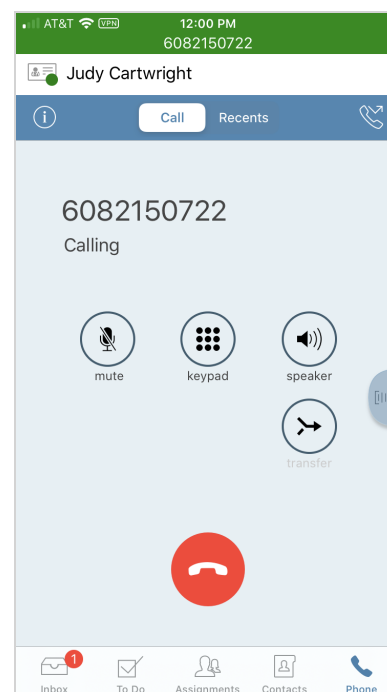
The images below are an example of the process between the two applications. Users will also be able to access the PatientTouch application on the contacts and patients screens.



1. Log into an Epic device with valid Epic credentials.



2. Click a PatientTouch link, i.e. phone number, in the Epic device.



3. Automatically navigate to the phone tab of PatientTouch and wait for the recipient to pick up the call.

Note: PatientTouch automatically opens; users bypass the security screen.

AirStrip One

This feature allows users of PatientTouch to seamlessly access AirStrip One to view patient specific clinical data. Users will be able log into PatientTouch using valid credentials, click a link, and automatically launch AirStrip One, without having to authenticate into the second application.

Please contact PatientSafe Solutions Technical Support Team for the Single Sign On Configuration document, which contains detailed instructions on how to configure this feature for your facility.

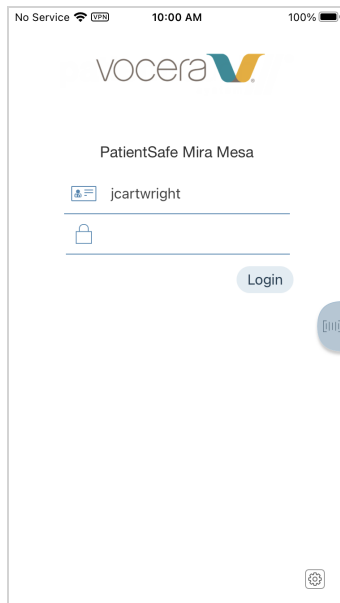


End User License Agreement (EULA)

EULA allows customers to prompt the user on initial login to agree to an expected use of the Vocera Edge application prior to the user being able to use the application. The EULA is configured in the Enterprise Manager and is written according to hospital policy.

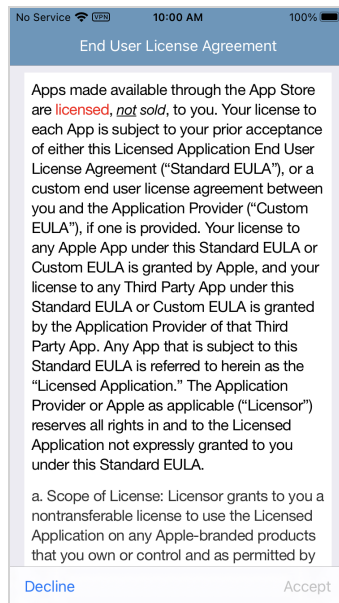
The EULA is based on each user's log in. Once a user accepts the agreement, he/she will not have to accept each time they log in. If, however, the license agreement is modified, users may be prompted to accept the modifications.

Please follow the instructions below to learn more.

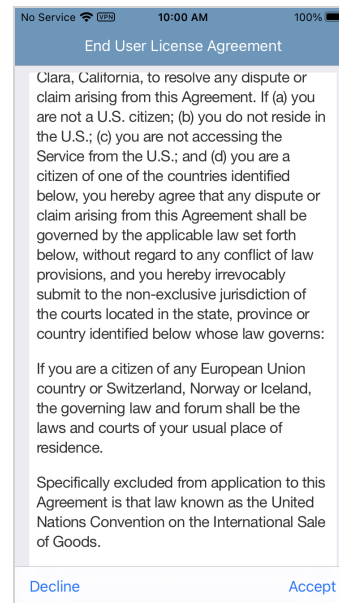


1. Enter your username and password.

2. Touch **Login**.

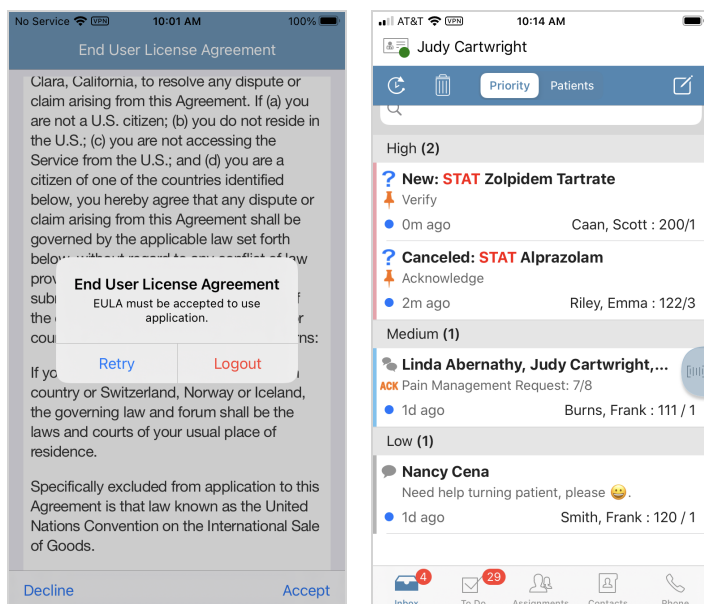


3. The end user license agreement displays.



4. Scroll to the bottom to read the entire text of the license.

5. Touch **Decline**.



6. When you touch **Decline**, a pop up dialog box displays stating you must accept the license agreement in order to use the application.

7. You only have the options to **Retry** or **Logout**.

8. When you touch **Accept**, you are taken to your **Inbox**.

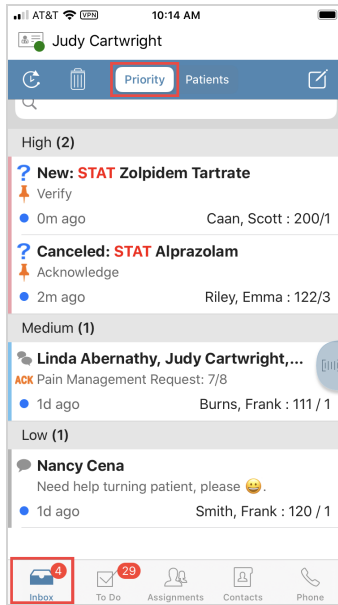
Inbox and Messaging

Viewing the Inbox

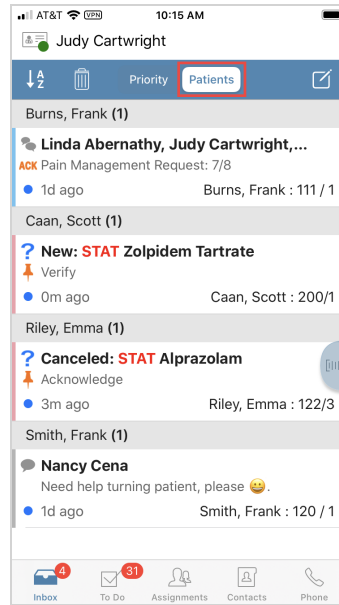
All users of the PatientTouch application will be able to view their Inbox. Depending on the installed modules and system configurations, users will have the visibility into a variety of communication messages. These messages can include order notifications for assigned patients and text messages from other caregivers. You can sort and view messages by priority or patient.



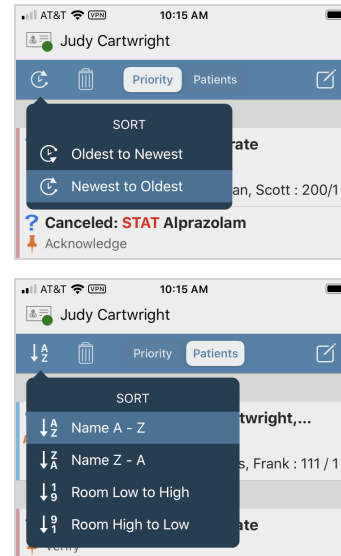
Users may not see messages/notifications until they have assigned patients/locations.



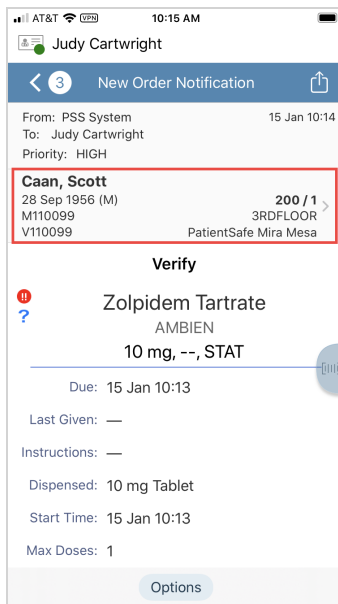
1. Your **Inbox Badge Count** indicates the total number of unread messages. The count displays messages related to your assigned patients.
2. It shows all messages associated with all module types.
3. View messages by **Priority** (High, Medium, Low).



4. Unread messages display a blue globe icon, which remains until the message is read.
5. Action item messages display a "pin" icon, which remains until the action is taken.
6. View messages by **Patient** name.



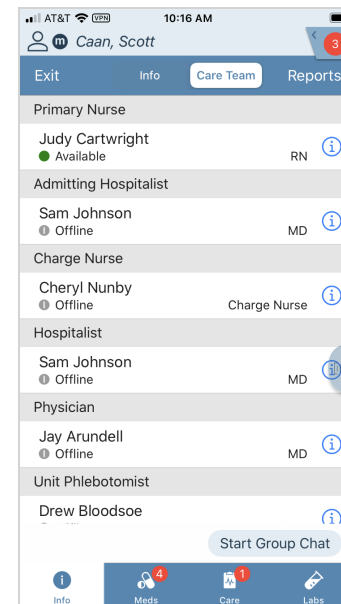
7. Filter messages by **Priority**>Oldest to Newest or Newest to Oldest.
8. Filter messages by **Patients/Rooms** in ascending or descending order.



9. Touch the patient tag to view the Patient Info screen.



10. View patient information.
11. Touch the Meds, Care, or



12. The patient **Care Team** displays all assigned care team



Labs tab.

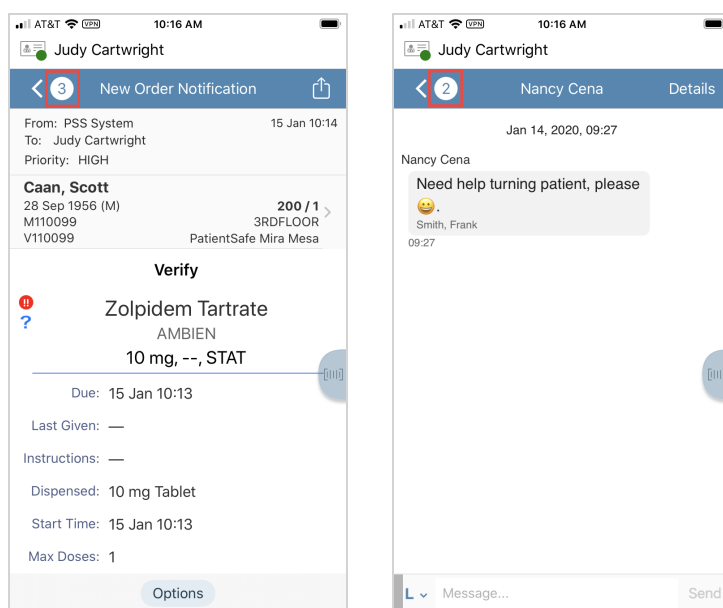
members.

Unread Message Count

PatientTouch Communications supports the display of unread message count on conversation details for all types of notifications, including external notifications, broadcast messages, new order notifications, and so on. This is to help decrease missed notifications.

If you are in one conversation that has one unread message, the #1 will display as the unread message count.

If you have multiple conversation going at once and have unread messages from any of these conversations, the unread message count will reflect the total number of unread messages from all conversations.

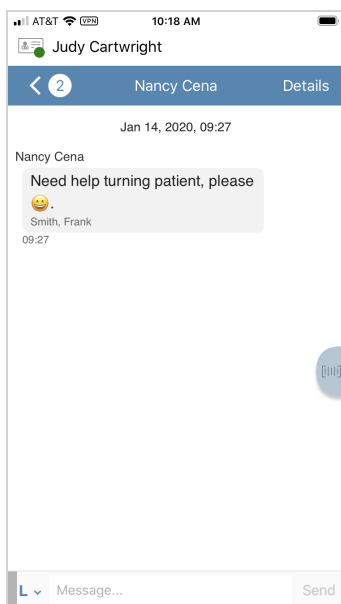


1. In this image, the total number of unread messages in the Inbox is 3.

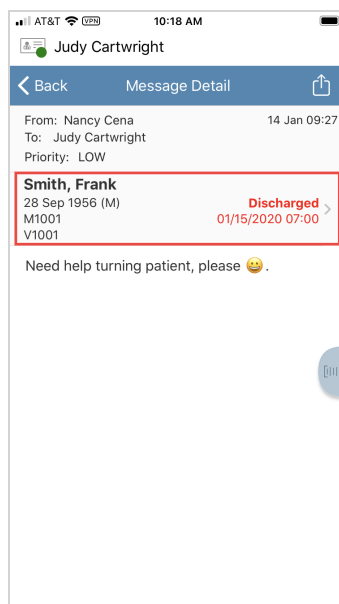
2. In this image, the total number of unread messages in the Inbox is 2.

Messages with Inactive Patients

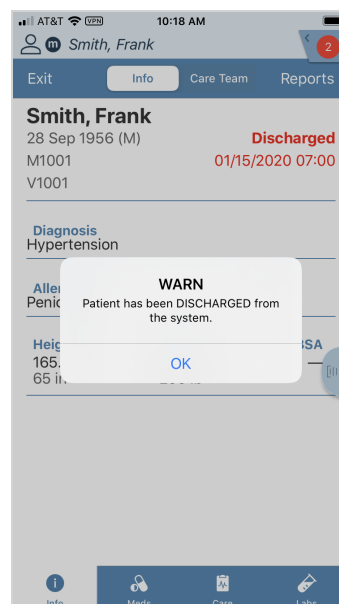
If you receive a message with a tagged patient who has since become inactive (discharged or no activity within 40 days), the message will indicate the patient's status.



1. Touch the message bubble to view the content.



2. The patient status displays along with the discharge date.
3. Touch the patient tag to view details.

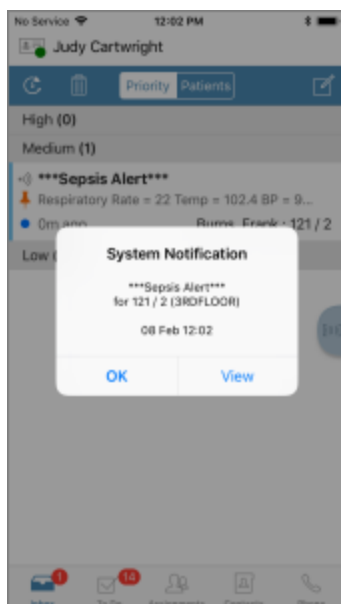


4. A warning message displays indicating the patient has been discharged.

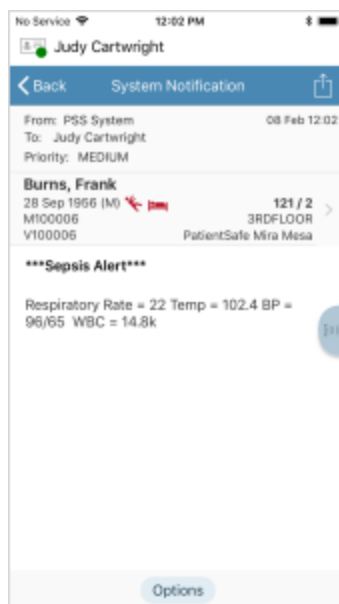
Multi Action Notification Buttons

The PatientTouch System provides the ability to perform multiple actions with one touch of a button. When users receive an external alert notification, they will be able to touch **Options** on the message details and touch "Accept & Call" for example. With that one button press, PatientTouch will accept the alert and communicate back to the nurse call system to prevent escalation. In addition, a call will be placed to the lab, patient's physician, or patient's room to silence an alarm.

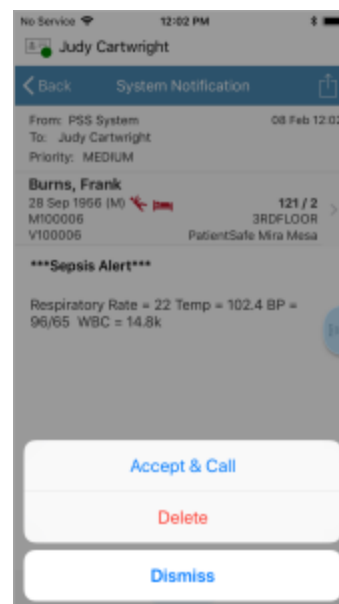
The screens below provide an example of screens the caregiver will see.



1. Touch **View**.



2. Touch **Options**.



3. Touch **Accept & Call** and the alert is accepted and communicated back to the nurse call system to prevent escalation.

4. With the same button press, a call is placed to lab, physician or the patients room for example.

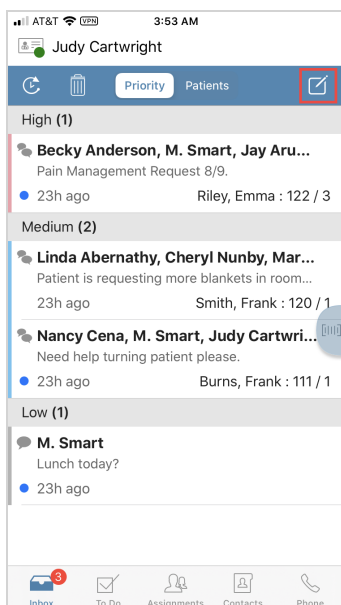
Composing a New Message

In order to compose a new text message, you must have the Clinical Communications module installed and Secure Messaging must be enabled in the Enterprise Manager>Settings>Secure Messaging tab.

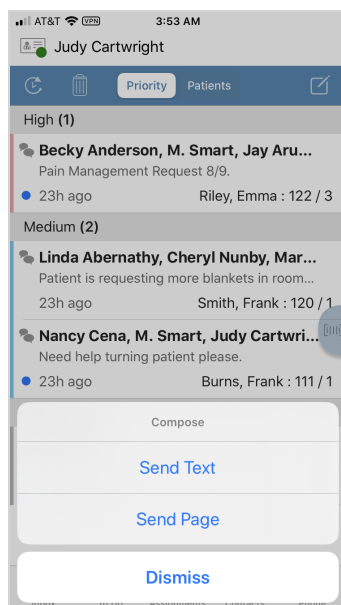
You can initiate a secure, multi-media message from the following three places: **Inbox** tab, **Contacts** tab, or the **Care Team** tab of a specific patient.



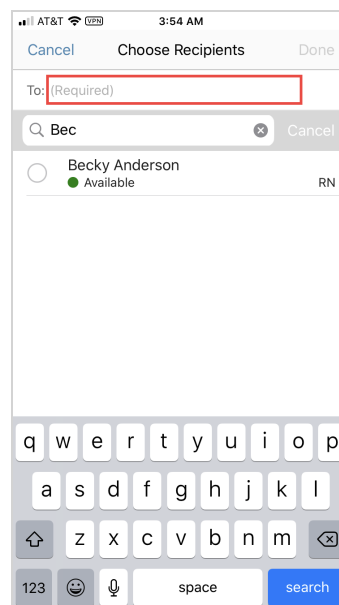
Inbox Tab



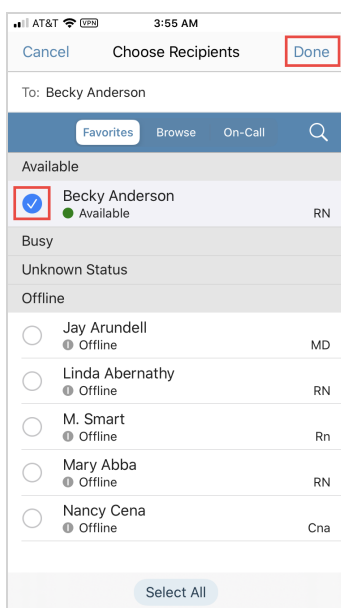
1. From the **Inbox**, touch the **Compose** icon.



2. Touch **Send Text**.

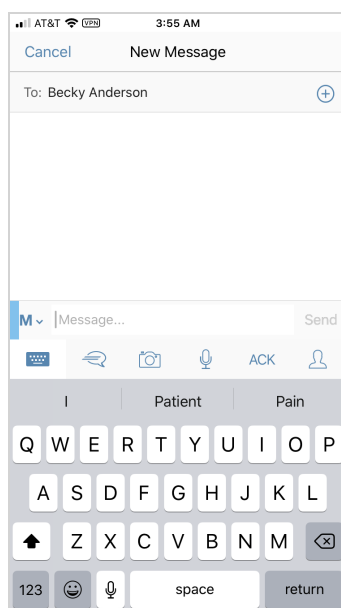


3. Type the name in the "To" field.



4. Or, touch a team member's name from your **Favorites**.

5. Touch **Done**.



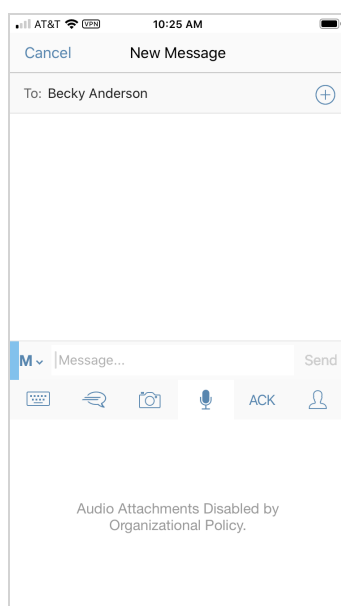
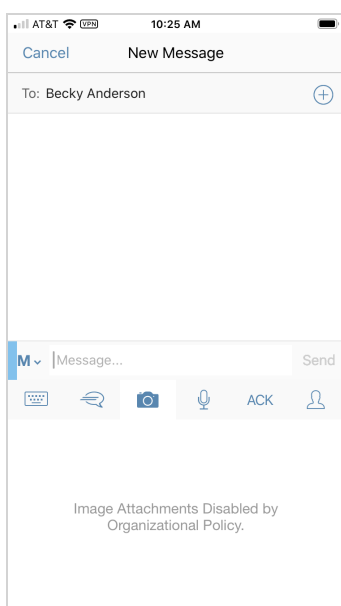
6. Compose your text message using the table below.



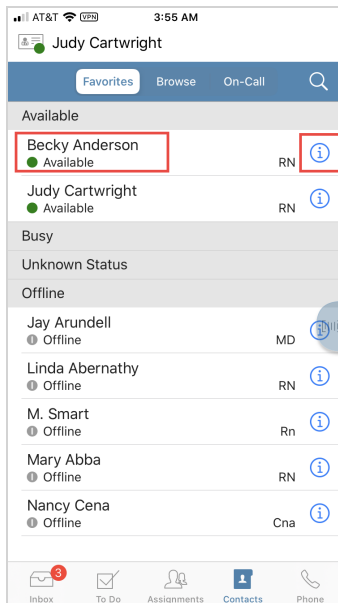
Set message priority level to: High (H), Medium (M), or Low (L).	Keyboard	Select and insert a Quick Text message.	Take and attach an image.	Record and attach an audio clip.	Request acknowledgment	Tag a patient to your message. You can only tag patients who are available to you.	Attach an emoji to your text messages.

Enable or Disable Image and Audio Attachments

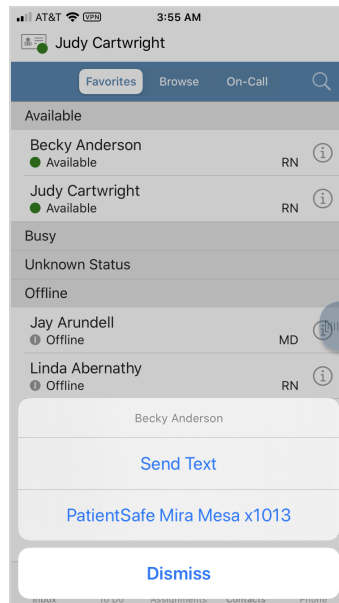
When you attempt to attach an image or audio file to a new text message, you may see the message in the images below. Hospitals may enable or disable image and audio attachments on messages, in accordance with hospital policies. These settings are controlled in Enterprise Manager by the System Administrator. When disabled, touching the image or audio icon will display a message indicating the attachment has been disabled by organizational policy.



Contacts Tab

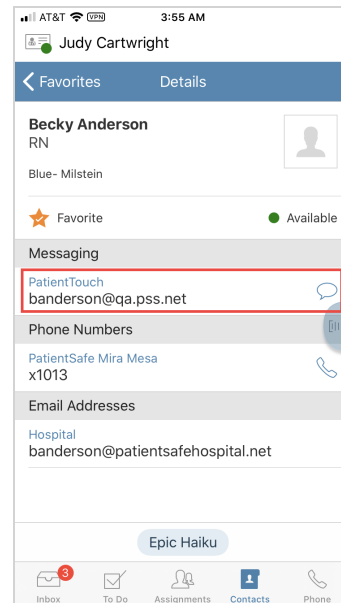


1. From the **Contacts** tab, touch the recipient's name or info (i) icon.



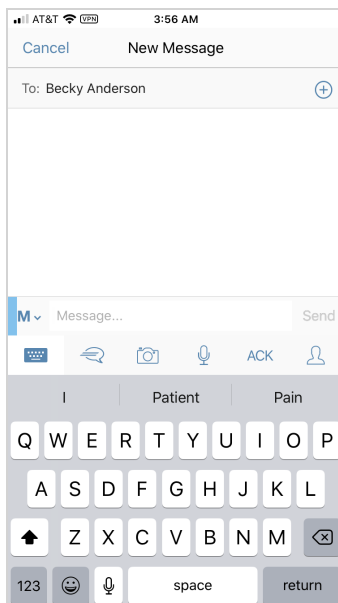
2. Touching the recipient's name displays the overlay above.

3. Touch **Send Text**.



4. Touching the Info (i) icon displays the **Contact Details**.

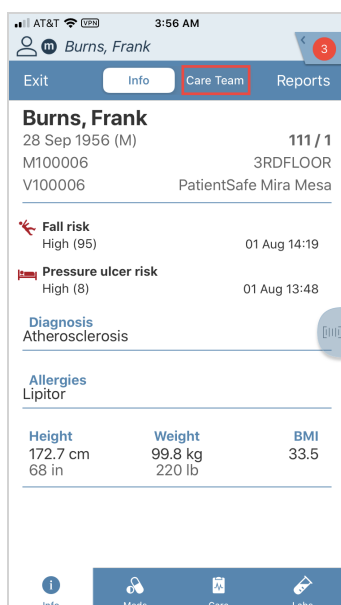
5. Touch the contact's messaging ID.



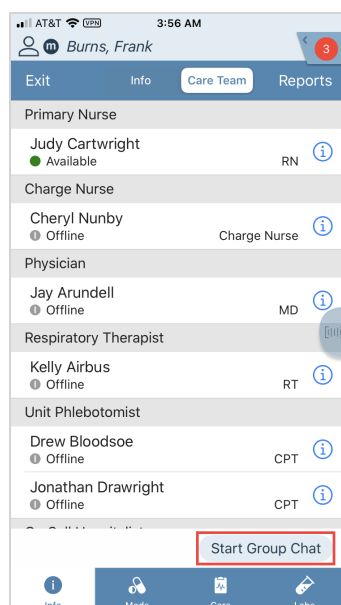
6. Compose your text message using the table above.



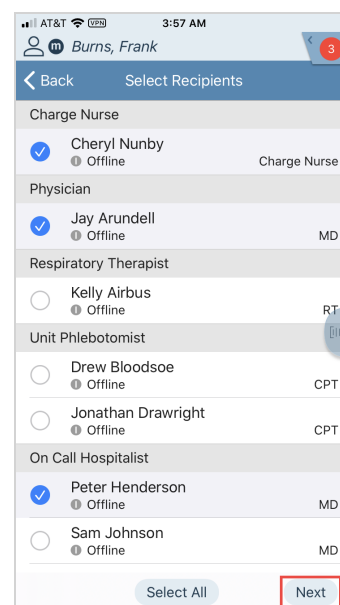
Care Team Tab



1. Touch **Care Team**.

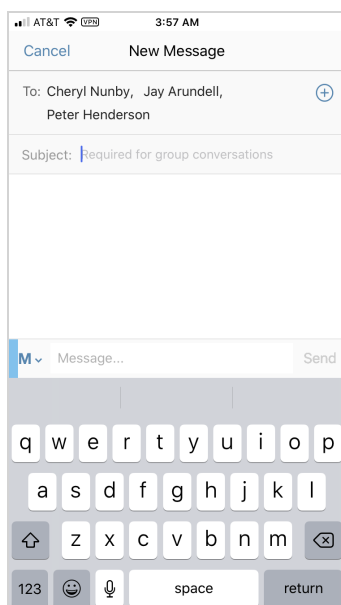


2. Touch **Start Group Chat**.



3. Select the care team members for which you want to send a message.

4. Touch **Next**.

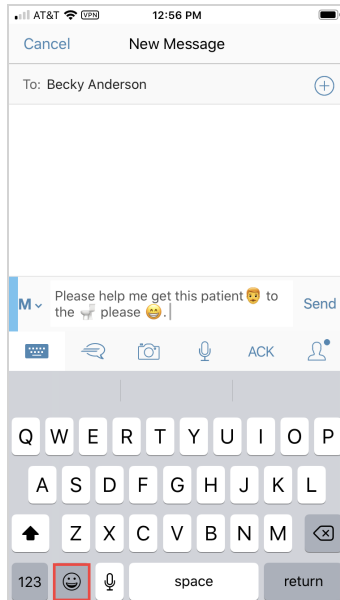


5. Compose your text message using the table above.

Emoji Support

Emoji support is for all end users of iOS Comms/Clinical, Android Comms and Web Messenger. It allows users to include emojis in messages.

Follow the instructions below to add an emoji.



1. Enter your message and click the **"Smiley Face"** icon to choose an emoji.
2. Click **Send** when you are ready.

Acknowledging a Request

Users can compose a message and include an Acknowledgement Request, which allows the recipient of the message to acknowledge receipt. If desired, the sender can request notification if the recipient has not acknowledged the message within a designated time frame.

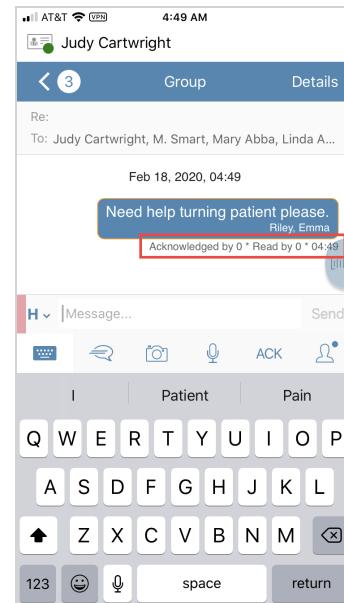
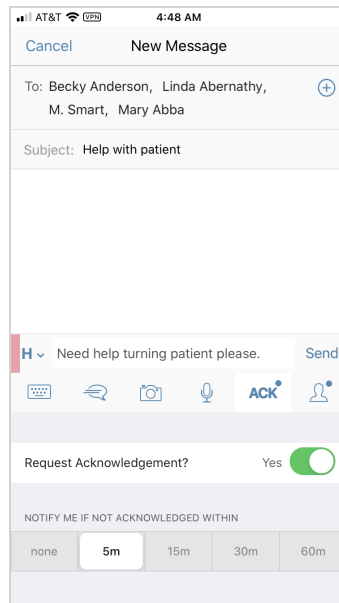
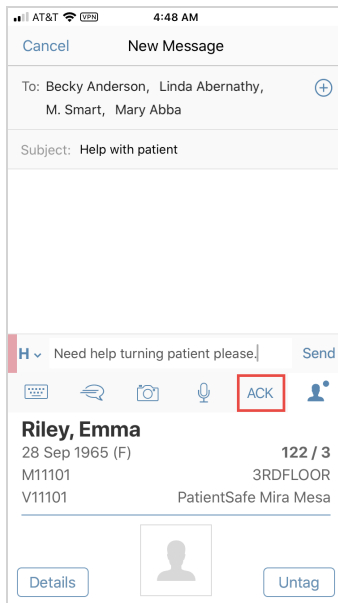
Acknowledgement requests can be included in a message to one or more recipients. In the case of a group message, the sender will receive a notification if not all messages are acknowledged within the designated time frame.

The scenario below is of a group message.



Users must have the appropriate privileges to use this feature.

Sender



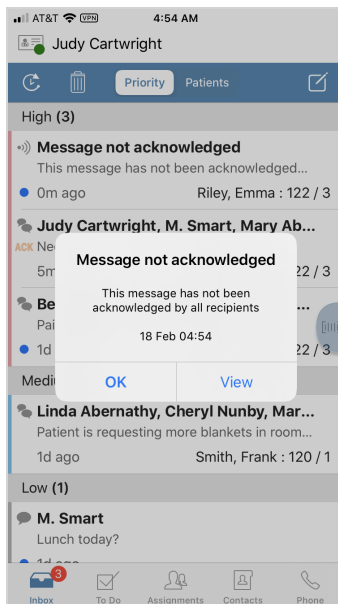
1. To include an acknowledgment request on a composed message, touch **ACK**.

2. Toggle the **Request Acknowledgment** field to **Yes**.

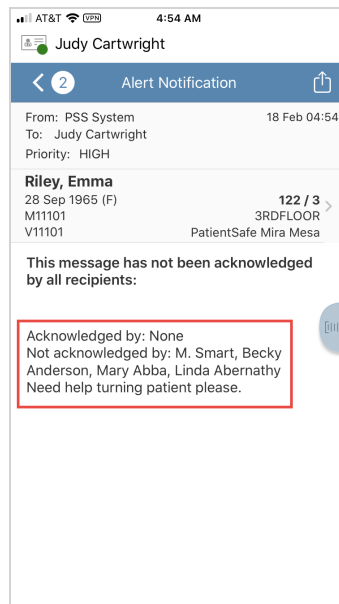
3. Select the time frame for which you want to receive notification if recipients have not acknowledged.

4. Touch **Send**.

5. The message displays with the number of recipients who have read and acknowledged the request.



6. When one or more recipients have **not** acknowledged the



8. The Alert Notification displays the name(s) of the person(s) who

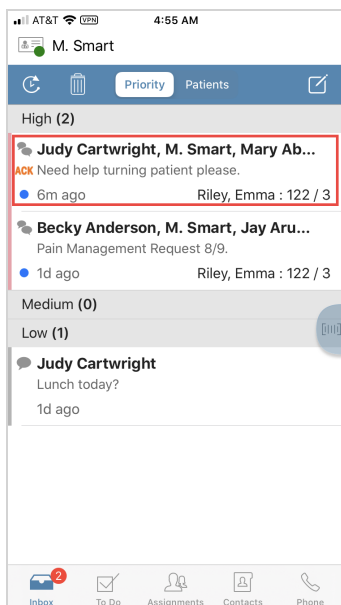


message within the designated time frame, a notification displays.

have/have not acknowledged.

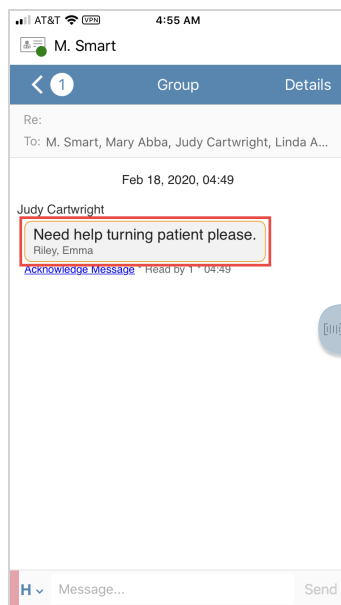
7. Touch **View** to see the details.

Receiver

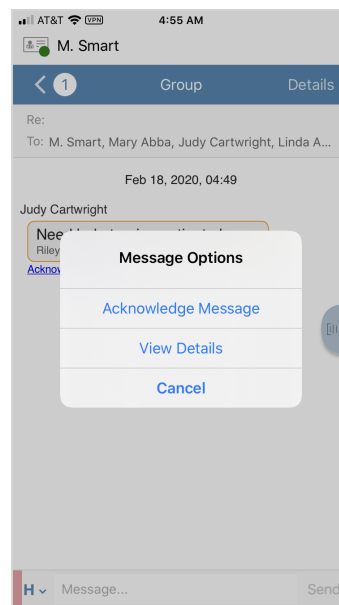


1. The inbox will display an **ACK** icon next to the message summary for messages that require acknowledgment.

2. Touch on the message summary.

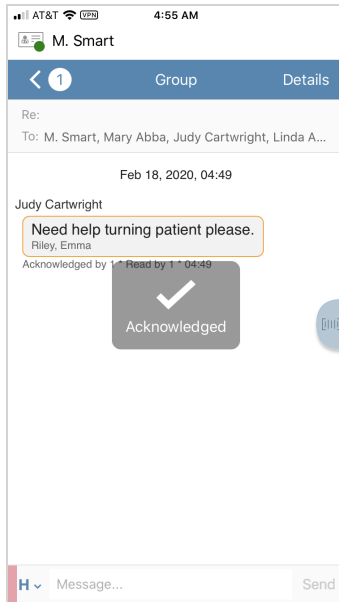


3. Touch the message bubble.



4. A notification message displays with options to acknowledge, view details, or cancel.

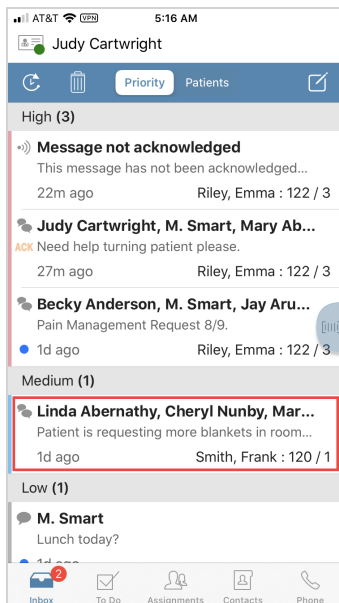
5. Touch **Acknowledge Message**.



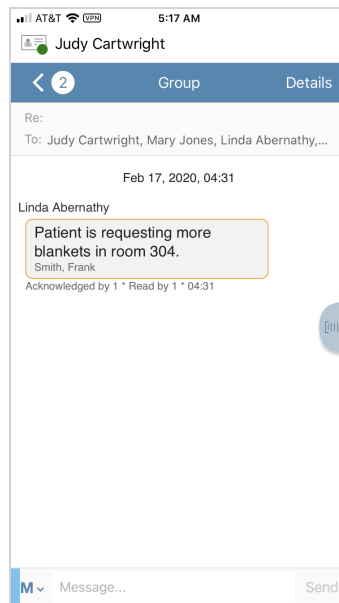
6. A check mark displays with a successful acknowledgment.

Forwarding Messages

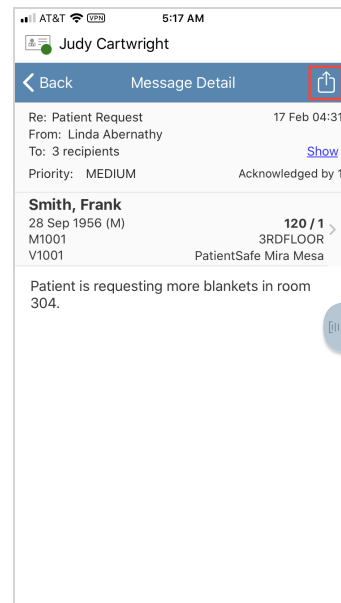
Caregivers can forward text messages to one another. For example, an attending physician may forward a text message to a resident for patient follow up.



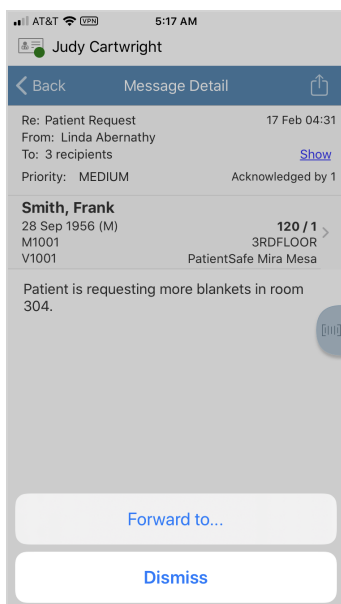
1. Touch a message from your **Inbox** to view it.



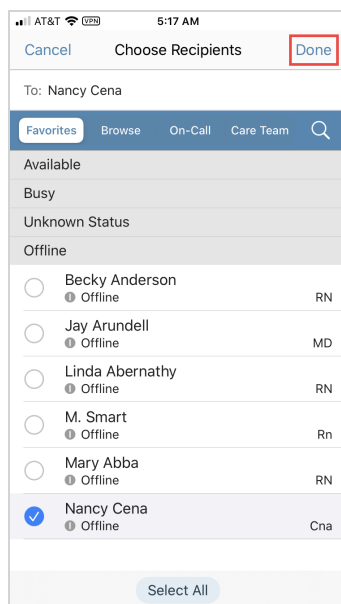
2. Touch the message to see message details.



3. Touch the **Forward** icon.

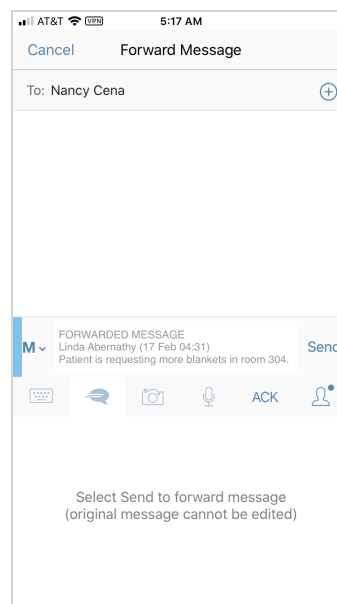


4. Touch **Forward to...**



5. Select a recipient from your list of Favorites.

6. Touch **Done**.

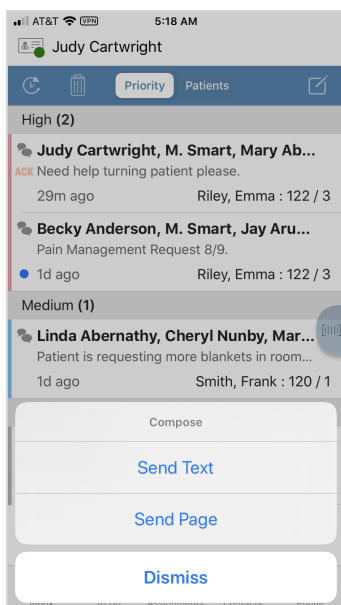


7. You cannot edit the original message, so touch **Send**.

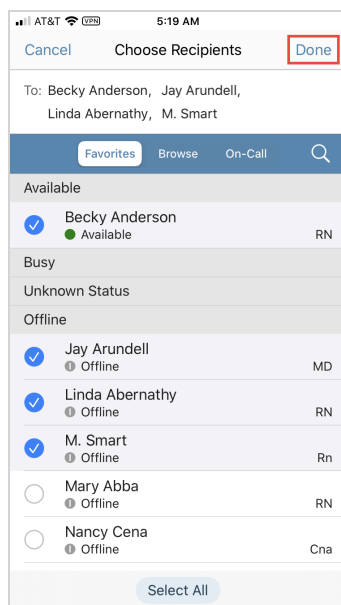
Offline Contact Notification

When configured, users will receive a "Contact Offline" message when sending a text message to recipients who are offline.

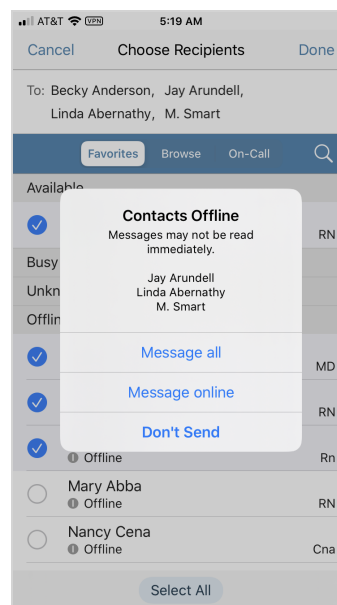
Please follow the instructions below to learn more about the Contacts Offline message.



1. Touch **Compose >Send Text**.



2. Select your recipients. In the image above, there are online



4. The **"Contact Offline"** message displays notifying users that their

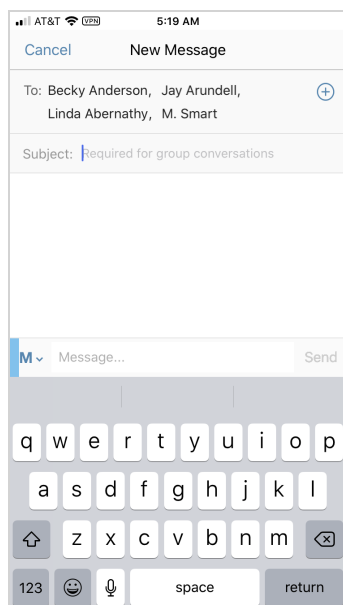


Note: You may also create a text message from the Contacts tab. and offline recipients.

3. Touch **Done**.

messages may not be read immediately. It also notifies you of those who are offline.

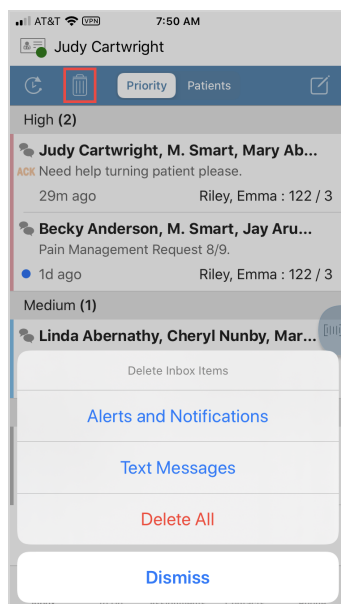
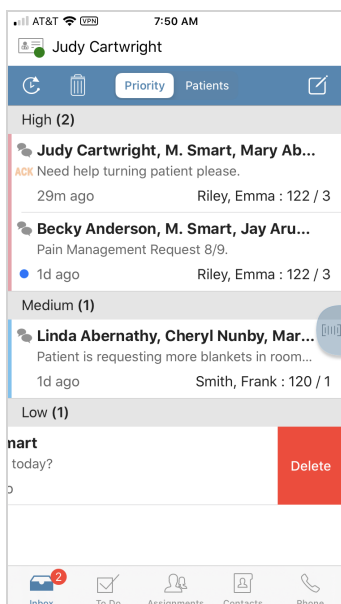
5. Touch Message All, Message online, or Don't Send.



6. Create your text message.

Deleting a Message

Use either of the following methods to delete messages.



1. Messages remain in your Inbox until the configurable amount of time set up in the Enterprise Manager.
2. Swipe left to **Delete** a message.
3. Touch the **Garbage Can** icon to delete all Alerts and Notifications or Text Messages.
4. Or, delete all items in your Inbox.

Disable Messaging per Facility

Hospitals can now configure their users to enable or disable secure messaging. Without the Secure Messaging permission, users will not be able to send or receive secure chat messages.

However, if users without the secure messaging permission wish to send a page, they can do so if configured for their facility.

- If secure messaging is disabled and SMS Paging is NOT configured, then the compose icon will NOT display.
- If secure messaging is disabled and SMS paging IS configured, then the compose icon WILL display.

Secure Messaging is configured in the Enterprise Manager>Clinical Profiles>Permissions>Secure Messaging.

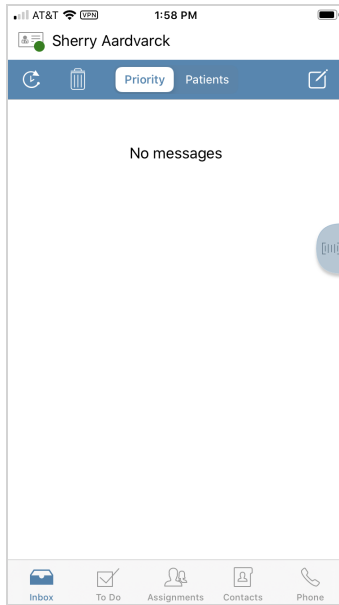


Message forwarding for alerts is also disabled for users that do not have the secure messaging permission.

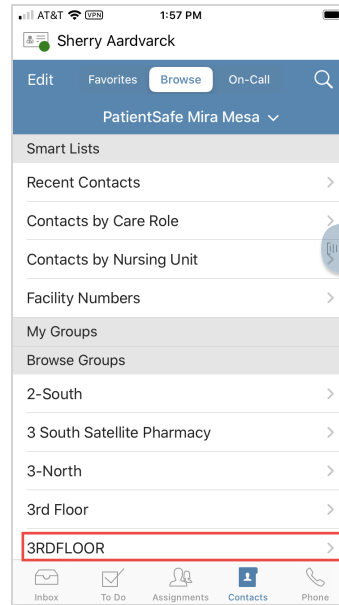
Please follow the instructions below to learn more about the Disable Messaging per Facility feature.

User Does Not have Secure Messaging

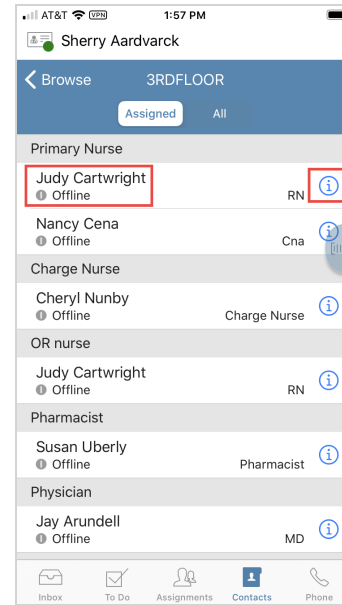
Case Manager, Sherry Aardvarch **does not** have the secure messaging permission and therefore cannot initiate a message, even if the recipient has secure messaging.



1. From the Inbox, touch **Contacts**.

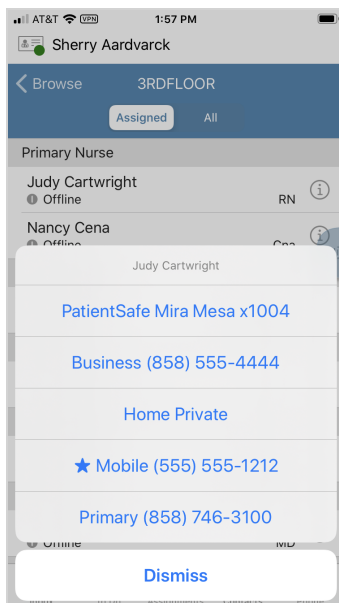


2. Select a **Browse Group**.

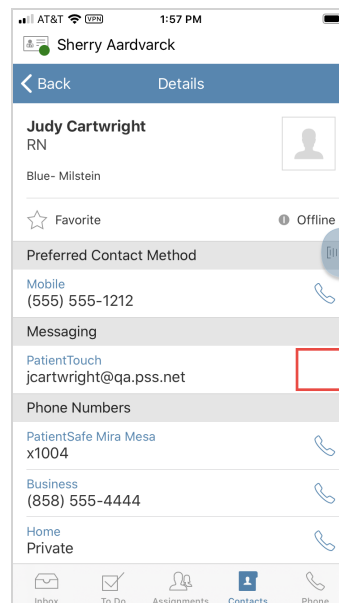


3. Judy Cartwright *does* have secure messaging permissions.

4. Touch **Judy's** name and **Info** icon to communicate.



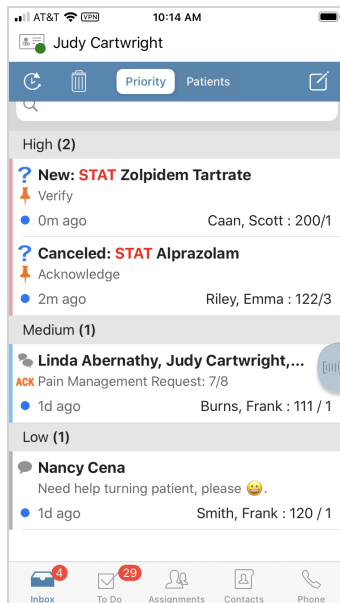
5. In this image, the Send Text option does not display because without the Secure Messaging permission, Sherry cannot send a text.



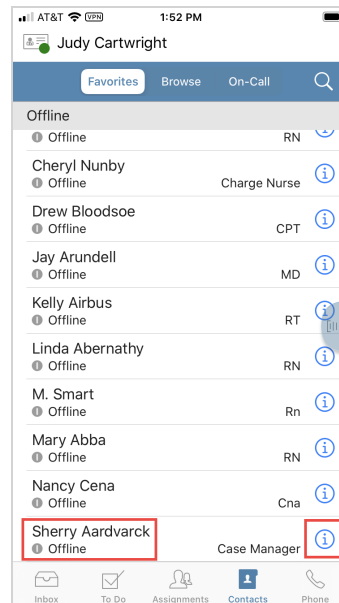
6. Contact Details does not display the message bubble for the same reason.

User Does have Secure Messaging

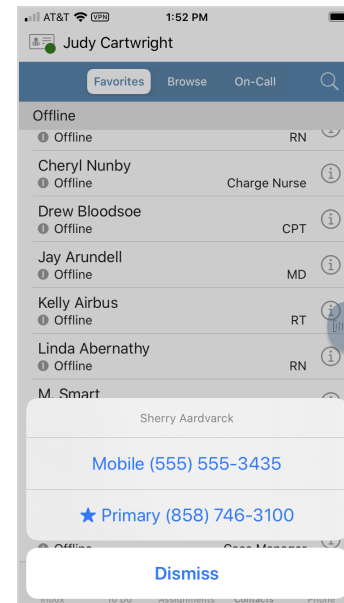
Primary Nurse, Judy Cartwright **does** have the Secure Messaging permission but the recipient, Sherry Aardvarch **does not, therefore, Sherry cannot receive a text message.**



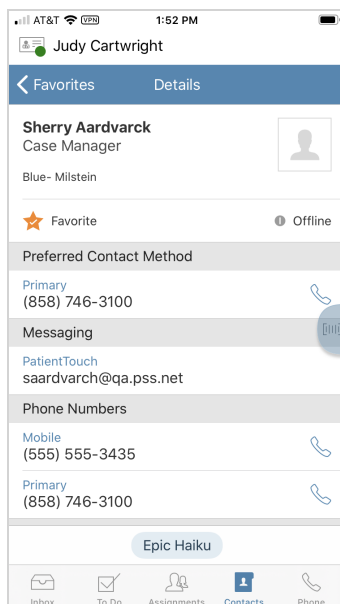
1. From the Inbox, touch **Contacts**.



2. From the list of Favorites, touch the Case Manager name and Info icon.



3. In this image, the Send Text option does not display because without the Secure Messaging permission, Sherry cannot receive a text message.



4. Contact Details does not display the message bubble for

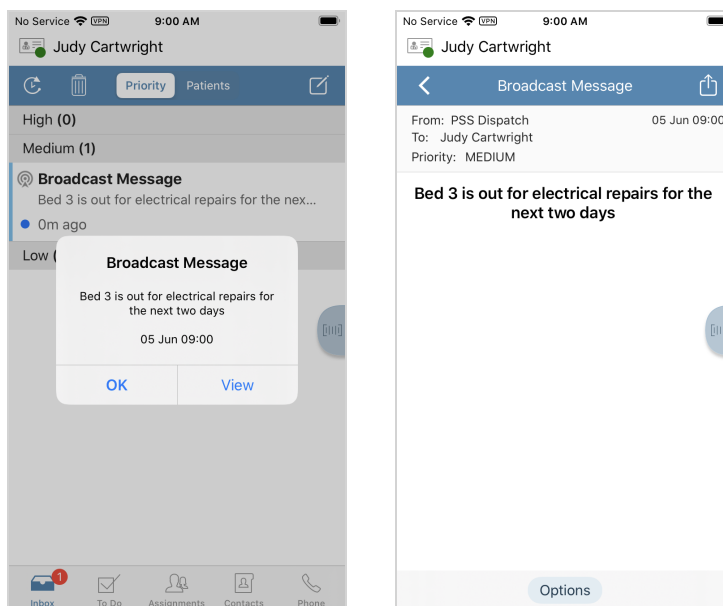
the same reason.

Targeted Broadcast Message

Users with the appropriate permissions have the ability to send a targeted broadcast message from Enterprise Manager to the following different groups:

1. Users in a nursing unit, team, group (org unit)
2. Users in a care role
3. Users in different departments

A sample broadcast message displays below that was sent to nurses in a specific nursing unit.



Alerts and Notifications

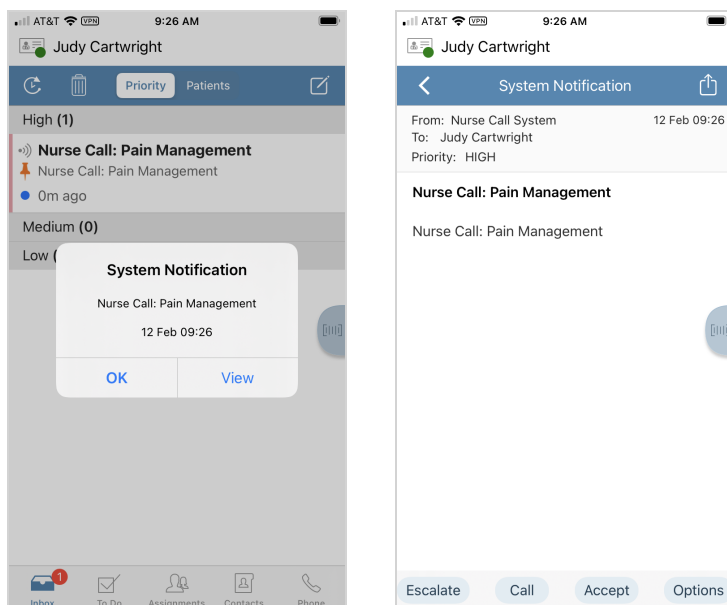
Alerts and notifications are sent to the caregiver's Inbox. Caregivers can touch View to access the alert. Caregivers may touch the following buttons to quickly respond to an alert:

Escalate: Escalates the alert to the next nurse or caregiver in the nursing unit.

Call: Places a call back to the patient's room.

Accept: Let's other caregivers know you've accepted the request.

Options: Options displays the option to delete the alert or dismiss the overlay and return to the Inbox.



Video Calling

Video calling introduces a new way of reaching caregivers and patients, creating a virtual care experience. Video can enable face to face calling with patients in isolation, connect caregivers across locations and provide real-time context of ongoing situations.

For example, a physician who is at home can call a nurse in the hospital to check on a patient in isolation. The nurse can bring their smartphone into the patient room to visually show the patient to the physician, or hand the device to the patient. This allows the physician to communicate with the patient from outside the hospital, reduces the need for the physician to don PPE and enables a face to face conversation between physician and patient.

Video may be used to initiate a one-to-one video chat or a group video conference. Additional caregivers can be added to ongoing calls. All of these examples are described below.

In order for caregivers to initiate video calls, they must meet the following requirements. Users must:

- have a smartphone (iOS/Android) on PatientTouch 4.9 or above
- have the Enable Video Calling permission enabled on their caregiver profile in Enterprise Manager

In order to receive a video call, users must:

- have a smartphone (iOS/Android) on PatientTouch 4.9 or above
- be logged in to receive video calls

In addition, the facility must contact PatientSafe Solutions Technical Support to configure Twilio integration for Video Calling.

Navigation

Use the controls on the top and bottom of the screen to navigate calls.

Top

From left to right:

Touch Back to return to the previous screen

Touch "camera" icon to turn camera on/off

Touch "pin" icon to pin a caregiver to the center of the screen

Toggle "speakerphone" icon to switch between using the speakerphone or the phone's microphone/headphones. See table below.

View the network connectivity icon to diagnose bad network connections.



Bottom

From left to right:

Touch "i" icon to see who is in the call

Toggle "sound" icon to turn sound on/off

Touch "end call" icon to end the call

Touch "video" icon to turn video on/off

Touch "+" to invite a caregiver to the call



Speakerphone/mic/headphone Icon Descriptions



Speakerphone icon displays by default. This provides users with the ability to hear video calls using the phone's speakers.



Toggle to the microphone icon to hear video calls using the phone's microphone. This allows users to switch to a private video conference.



When the user has headphones, the headphone icon displays. Touch the headphone icon to see a pop up menu that allows you to switch between the speakerphone, microphone, or the external headphone device.

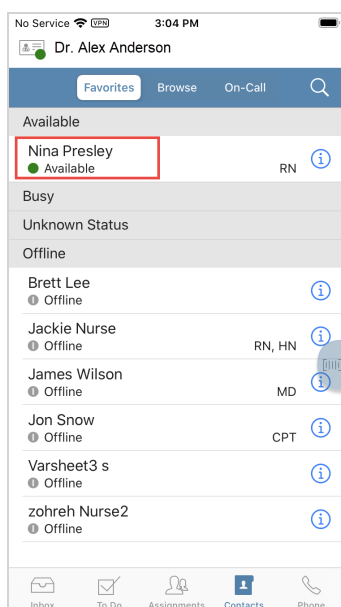
One - to - One Video Calls

Initiating a One-to-One Video Call

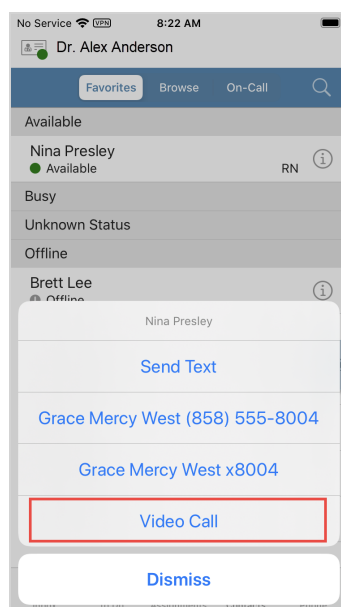
The first three examples below indicate how a video call can be initiated from favorites, touching the compose icon, or by accessing the contact profile. In the below examples, Dr. Anderson is requesting a video call with Nurse Nina Presley.



Favorites

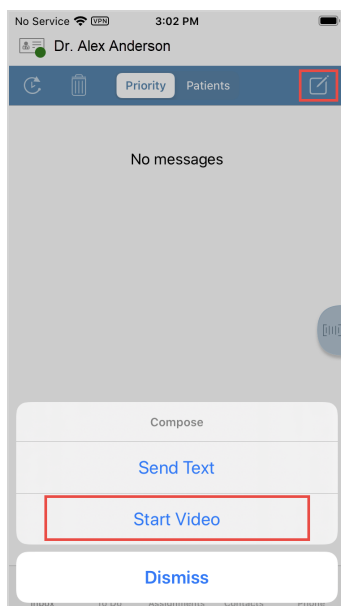


1. From Favorites, touch the caregiver's name with whom you want to initiate a video call.

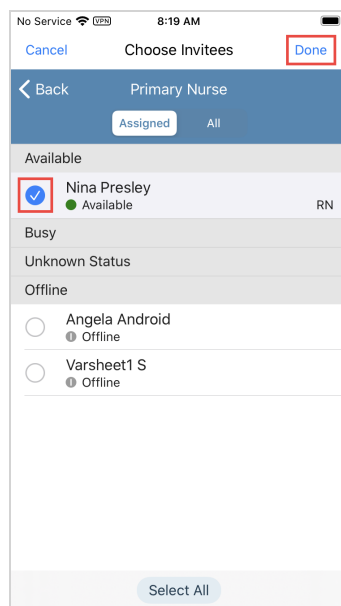


2. Touch **Video Call**.

Compose Icon



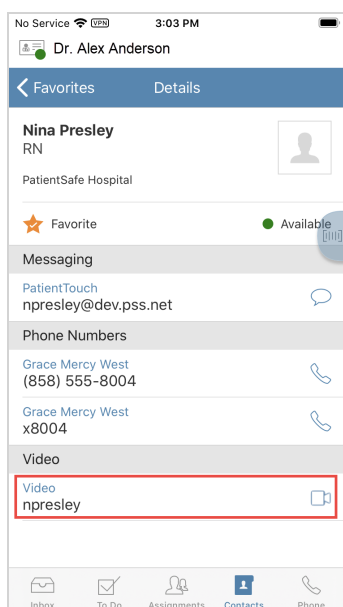
1. Touch the Compose icon, **Start Video**.



2. Touch the caregiver's name with whom you want to initiate a video call.

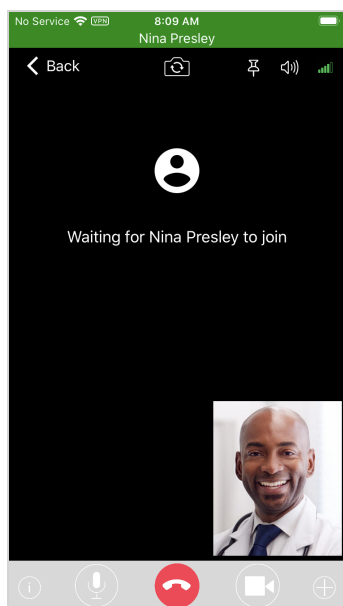
3. Touch **Done**.

Contact Profile



1. Touch anywhere inside the red line on the contact profile screen and initiate a video call.

Once the call is initiated, you will be placed into the video call.



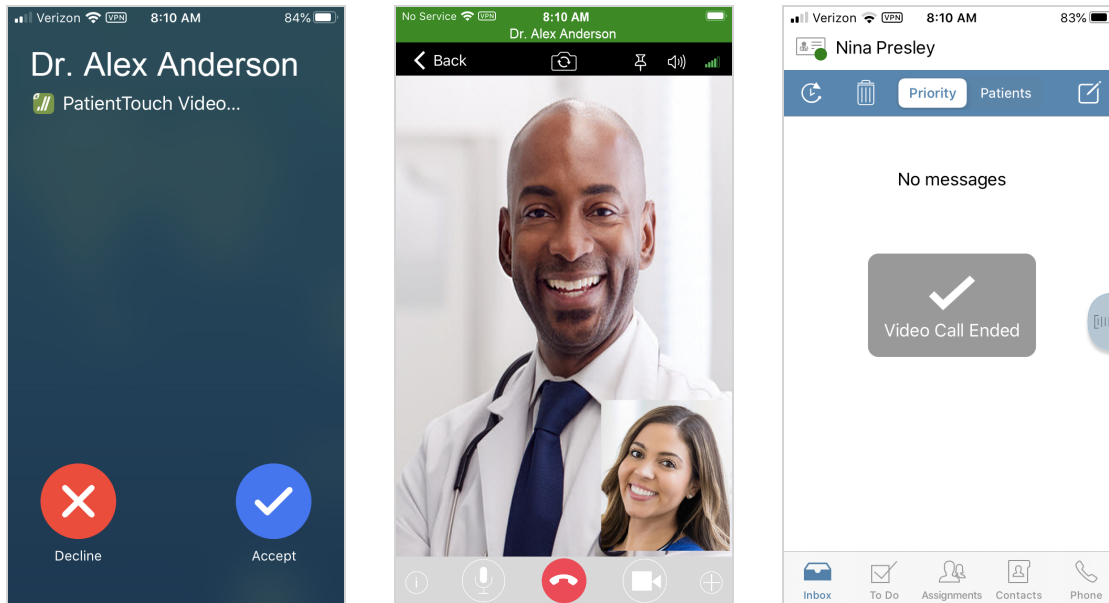
1. This screen will be displayed while waiting for the contact to answer the call.
2. Your image displays in the bottom right.



3. Once the caregiver answers the call, his/her image displays in the center and you may begin the video chat.
4. Touch the **End Call** icon to end the call.

Receiving a One-to-One Video Call

From our example, Nina Presley is answering Dr. Anderson's video request.



1. Touch Accept to answer the video call.

2. The image of nurse Presley displays in the bottom right while Dr. Anderson displays in the center.

3. Touch the End Call icon to end the call.

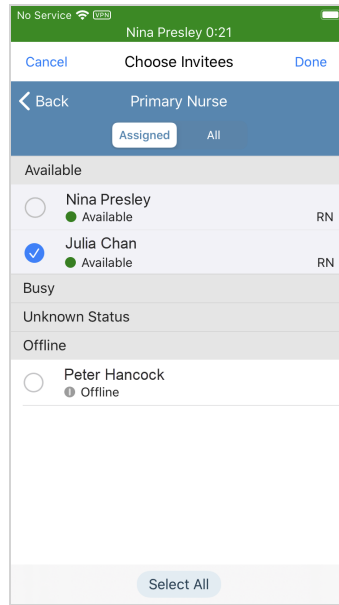
4. A check mark displays indicating the call has ended.

Adding an Individual to a Video Call

While on a call, users can add one or more individuals to the call.



1. While on a call, click the **plus (+) sign** in the lower right corner to add an individual.



2. Select the individual to add to the call.

3. Touch **Done**.



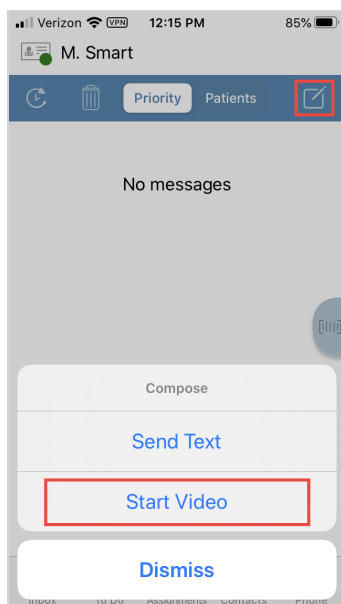
4. The added caregiver displays on screen with the rest of the team.

Group Video Calls

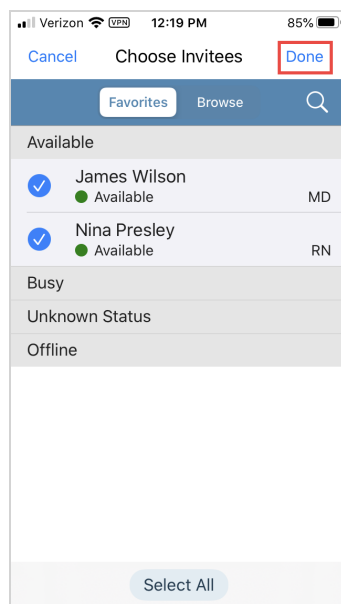
Initiating a Group Video Call From Favorites

Caregivers may need an urgent meeting with a specialist to review a patient's treatment. However, the specialist may not be able to meet in person. The caregiver can quickly put together a group video call so that the nurse, specialist, and any other qualified caregiver can speak collaboratively on treatment options.

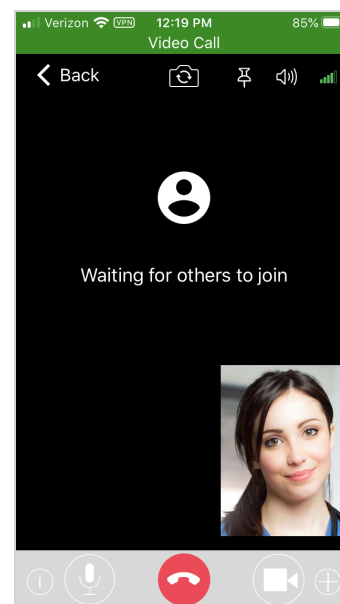
Users can quickly put together a group video call using the compose icon>favorites.



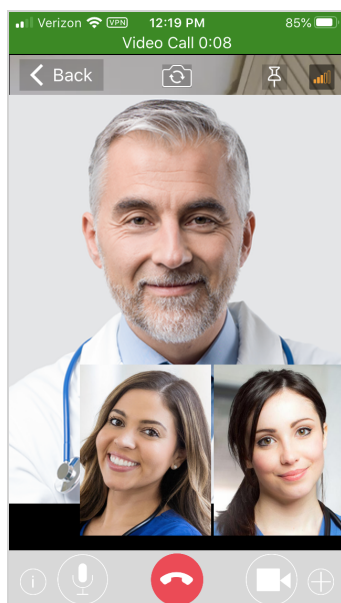
1. From the Inbox, touch the Compose icon, Start Video.



2. Select the names of the specialist and caregiver.
3. Touch **Done**.



4. Wait for the others to join the video conference.



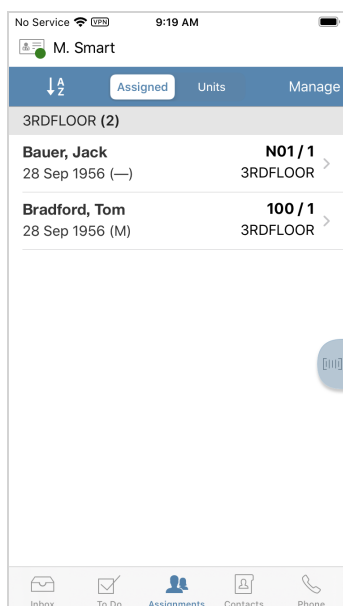
5. When the others join, their images display on screen and you can begin the video chat.



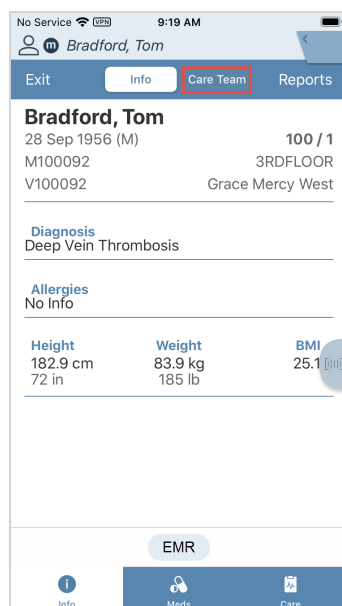
Initiating a Care Team Video Call

Caregivers may contact a patient's care team using video. These calls can be directly initiated with a single member, or several members of the care team. See the steps below to initiate a care team group call.

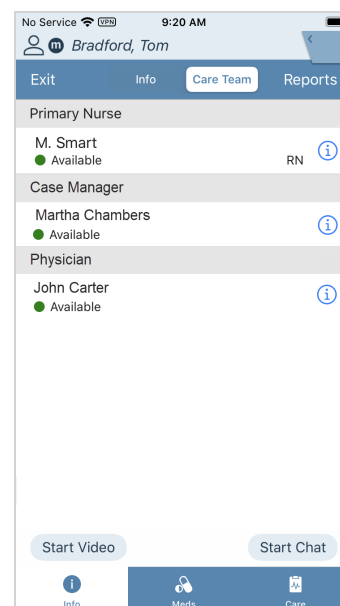
For an example of group video, consider scenarios where some caregivers may be working remotely. A nurse, case manager, and physician may have a group call to sync quickly on discharge steps for a patient.



1. From the Assignments tab, select the patient.

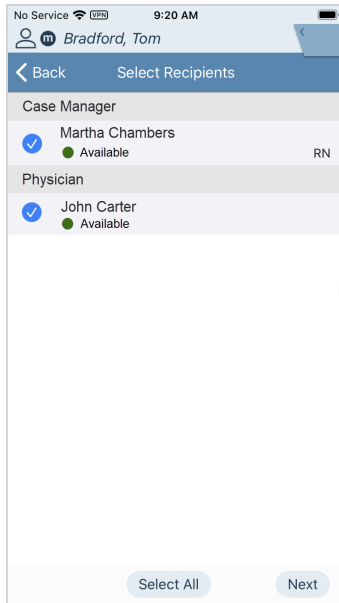


2. Touch Care Team.

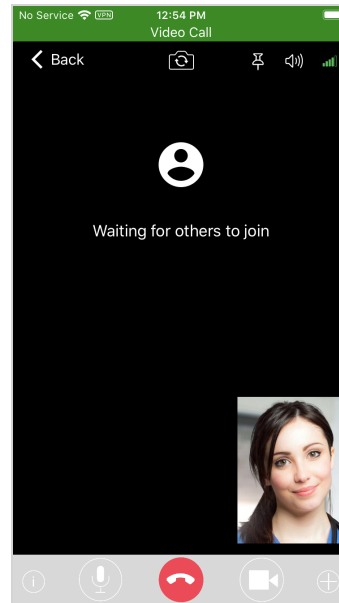


3. All of the patient's care team members display.

4. Touch Start Video.



5. Select the team members and touch Next. Only team members who meet the minimum video requirements and are online will display.



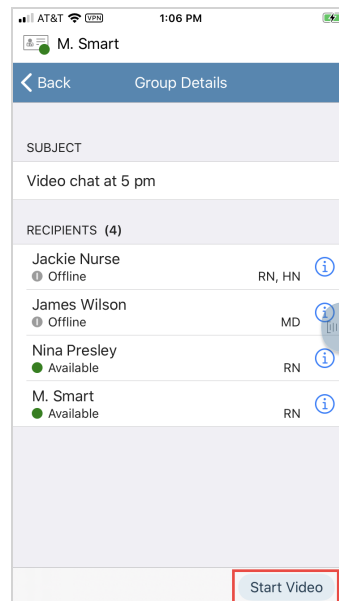
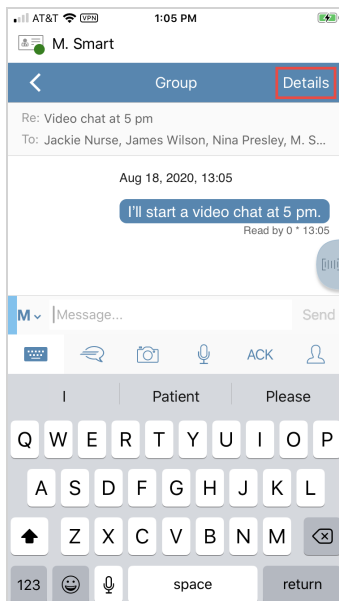
6. Wait for the others to join.



7. When the others join, their images display on screen and you can begin the video chat.

Initiating a Group Video Call from Message Details

Users can set up a group video call by touching **Details** on the message screen. When ready, touch **Start Video** to initiate the video call.

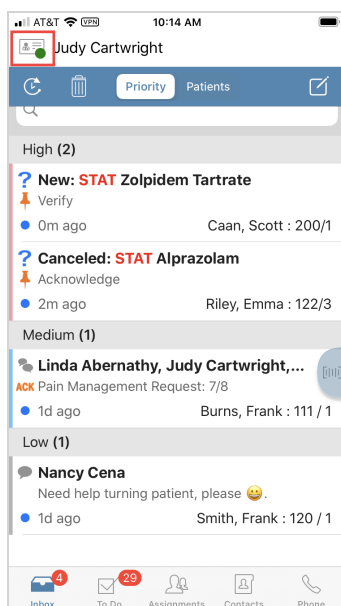




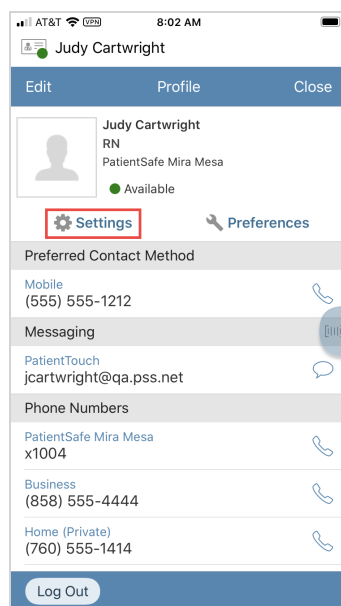
User Profile

Accessing the Icons Legend

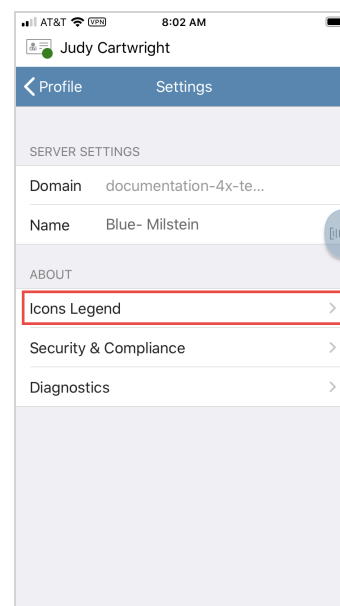
Access the PatientTouch Icons Legend, which contains the following icons: Patient Risk Indicators, Patient, Caregiver Presence, Messaging & Notification, Clinical Order Status, and Clinical Workflow.



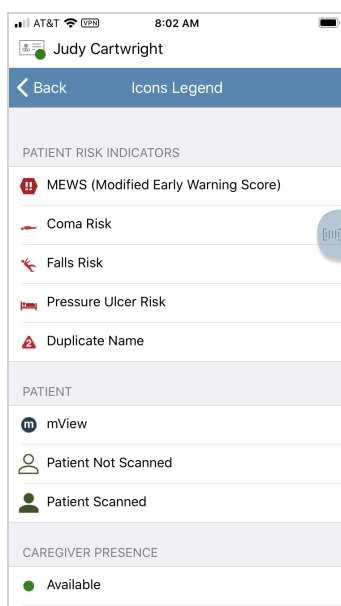
1. Touch the **Profile** tab.



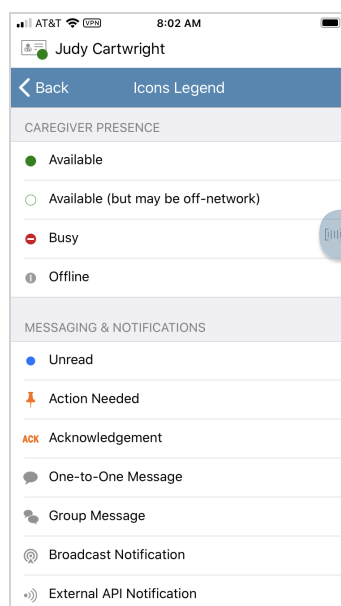
2. Touch **Settings**.



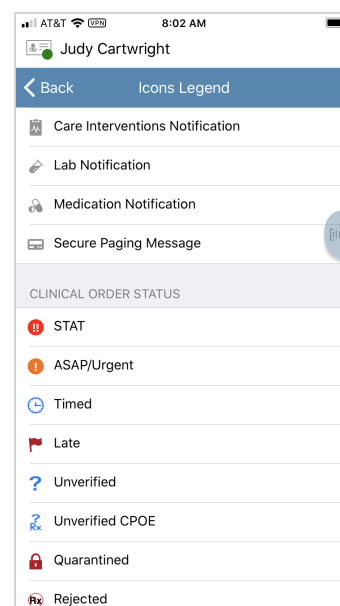
3. Touch **Icons Legend**.



4. All of the **PatientTouch**

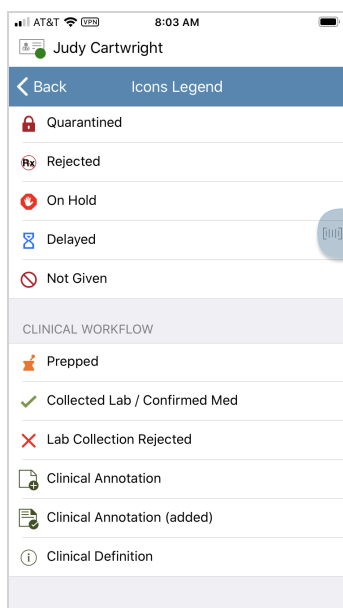


5. Scroll down to see more icons.



6. Continue to scroll.

Application icons display.

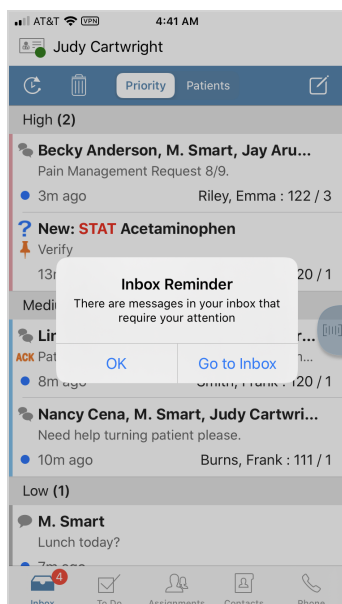


Setting Inbox Reminders

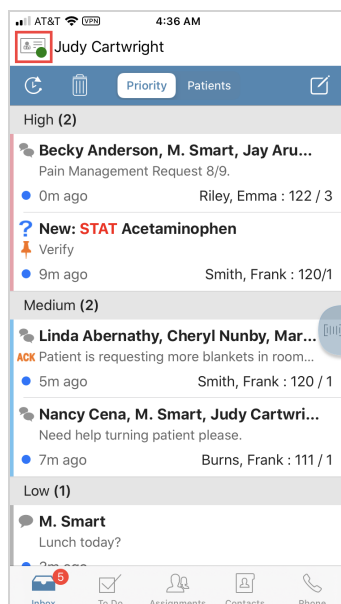
If configured, users can choose to receive **Inbox Reminder** notifications, even when the application is in the background or is in lock screen. A sample Inbox Reminder notification message displays in the first image below.

Users can enable or disable notification reminders using their own device. All settings will be retained even if you disable and re-enable reminders.

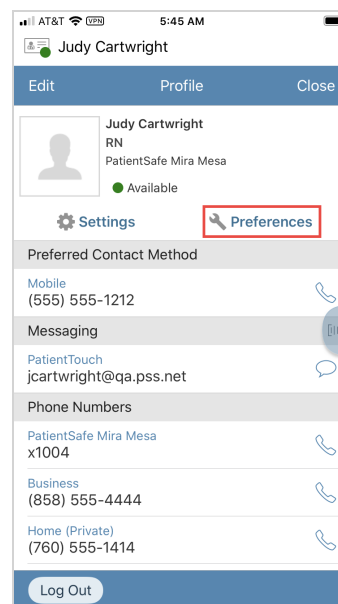
Please follow the instructions below to enable or disable the Inbox Reminder notification setting.



When the notification appears, touch **Go to Inbox** to see your messages.



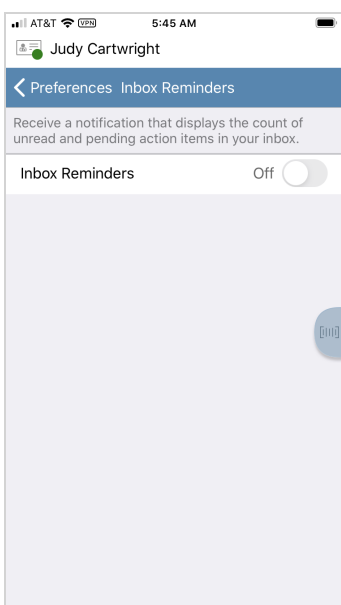
1. To configure your settings, touch the **Profile** tab.



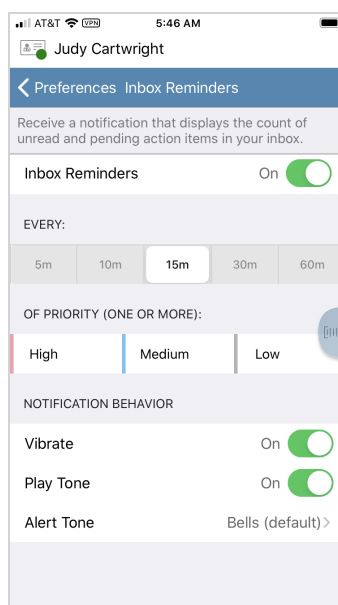
2. Touch **Preferences**.



3. Touch **Inbox Reminders**.



4. Toggle **Inbox Reminders** to "On."



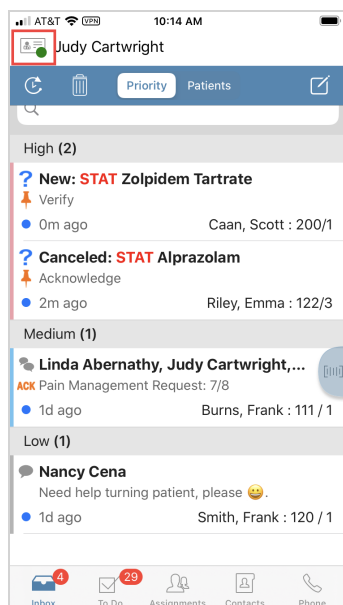
5. Select the **time frame** for which to receive a reminder notification.

6. Select the **message priority** for which you want to receive reminders.

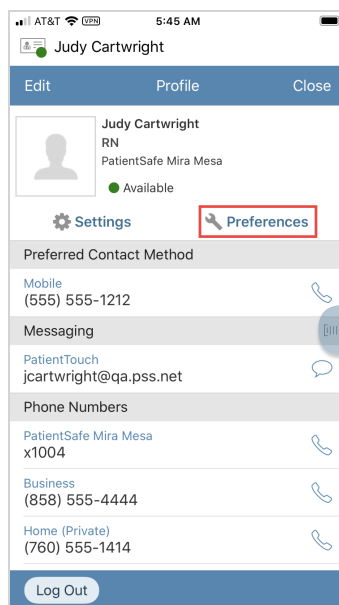
7. Select the **notification behavior** to vibrate or select an auditory alert.

Changing Your Password

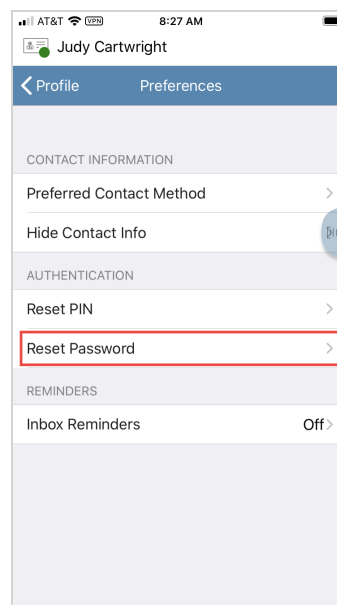
PatientTouch allows you to change your password using the handheld.



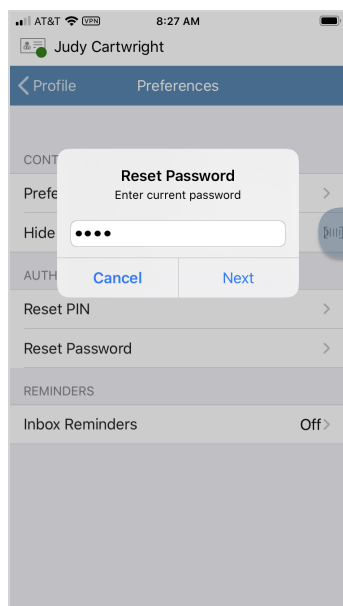
1. Touch the **Profile** icon.



2. Touch **Preferences**.



3. Touch **Reset Password**.



4. Enter your current password.

5. Touch **Next**.



6. Enter your new password twice.

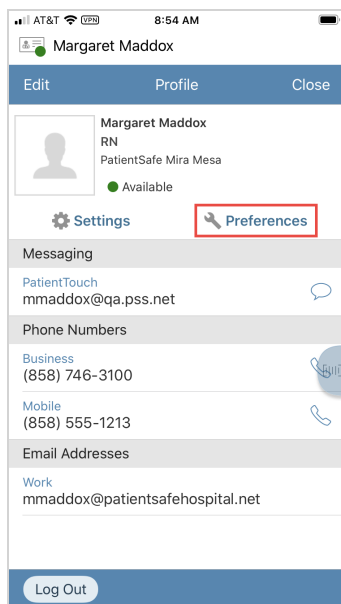
7. Touch **Done**.

Setting and Resetting Your PIN

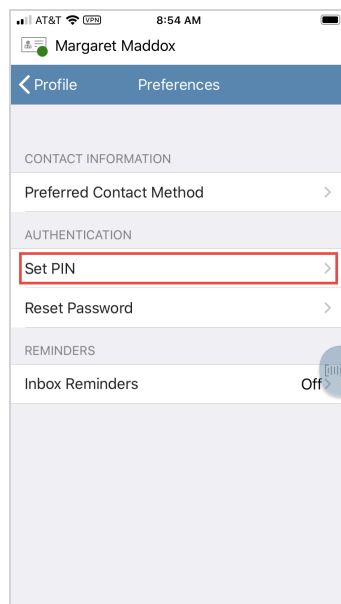
Caregivers using a shared clinical device may set or reset their PIN using the Profile screen of the handheld.

Setting a PIN

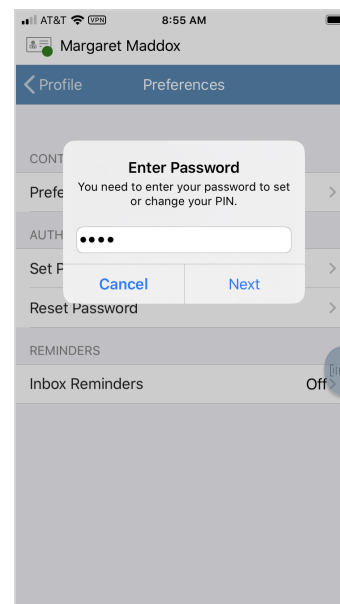
Passwords and PINs are typically set up in the Enterprise Manager when a user account is created. However, some users may not have a PIN configured. If you have **not** had a PIN created, you can create one using the Profile screen on the handheld using the instructions below.



1. Touch **Preferences**.

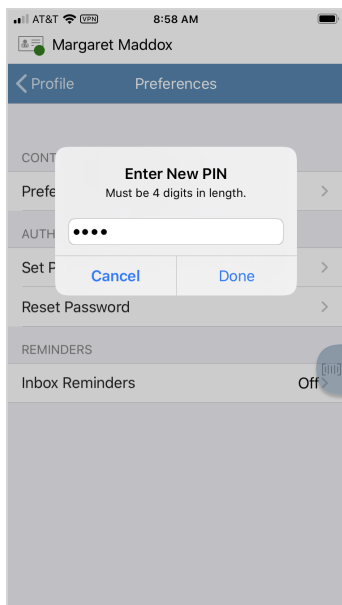


2. Touch **Set PIN**.



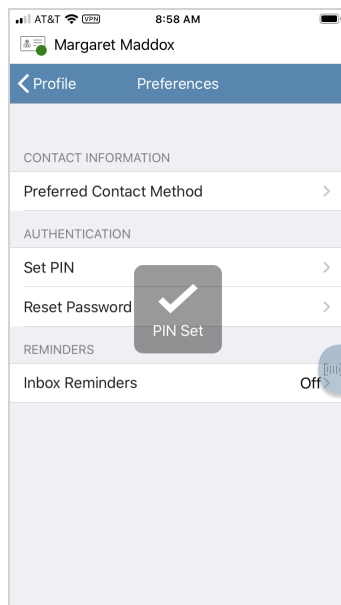
3. Enter your PatientTouch password.

4. Touch **Next**.



5. Enter your new 4 digit PIN.

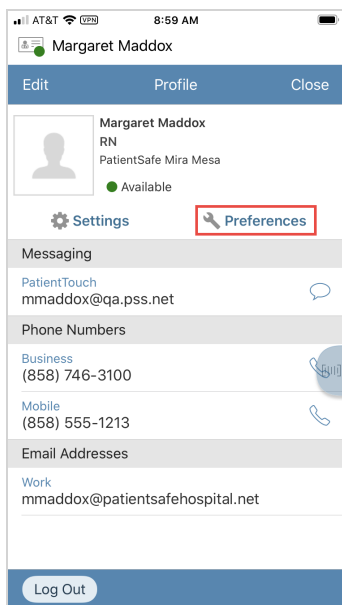
6. Touch **Done**.



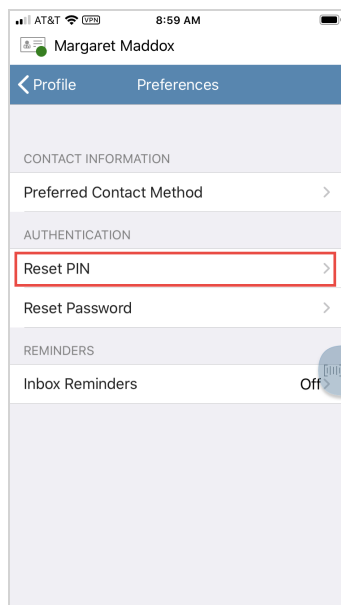
7. A check mark displays indicating a successful PIN Set.

Resetting a PIN

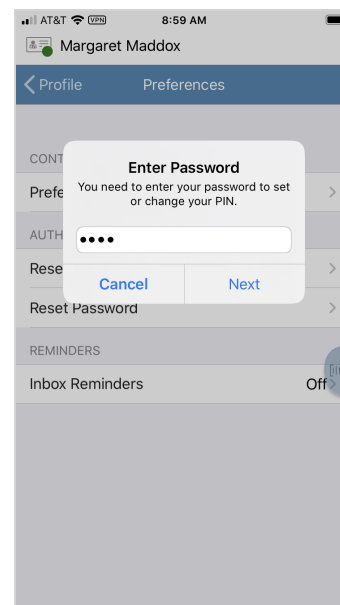
If you had a PIN created when your user account was set up, or, you just want to change your PIN, you can do so using the Profile screen of the handheld using the instructions below.



1. Touch **Preferences**.

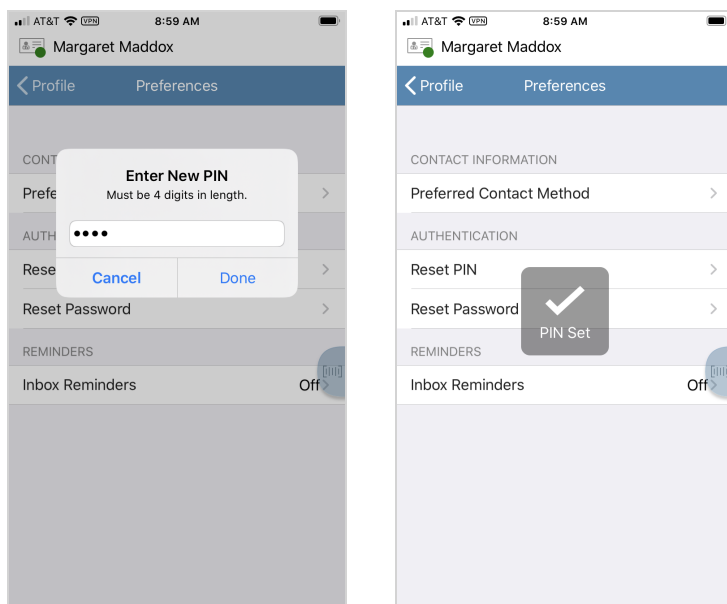


2. Touch **Reset PIN**.



3. Enter your PatientTouch password.

4. Touch **Next**.



5. Enter your new 4 digit PIN.

6. Touch **Done**.

7. A check mark displays

indicating a successful PIN Set.

User Defined Status

Background

PatientTouch caregivers use presence to let others know when they are available, busy or offline. With User Defined Status, caregivers can optionally include a text status providing more details such as alternative contacts or how long they will be busy.

User Defined Status allows caregivers to:

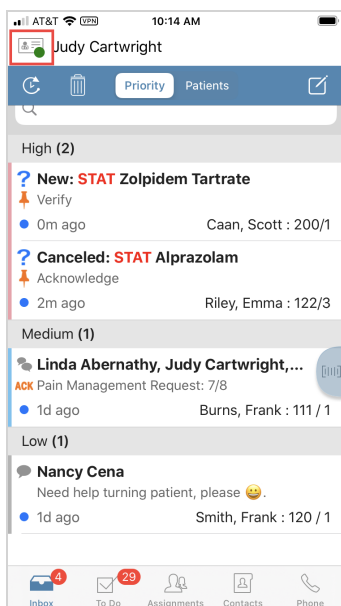
- Change their presence from Available to Busy
- Optionally, enter a text description up to 50 characters. For example, where they are and an extension to call while they are busy
- Save the information until a designated time in the future

Configuration

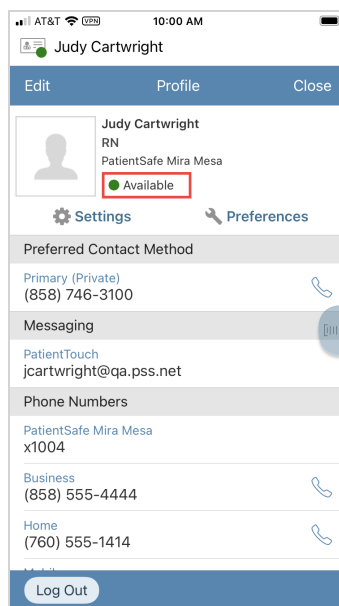
- Facilities must have the Enterprise Manager>Settings>Secure Messaging>User Defined Status setting enabled
- If Emoji support is enabled (Enterprise Manager>Settings>Secure Messaging>Emoji Support), user defined statuses can also include emojis

User Experience

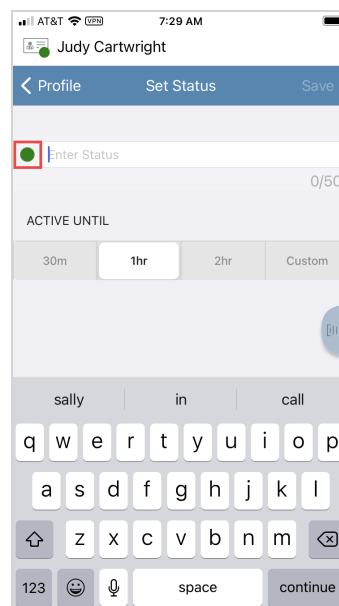
In the scenario below, you will see how nurse Judy Cartwright sets her status and changes her presence to reflect her surgery schedule for the day. You will also see how her updated status appears to other users.



1. To set your status, touch the **Profile** icon.



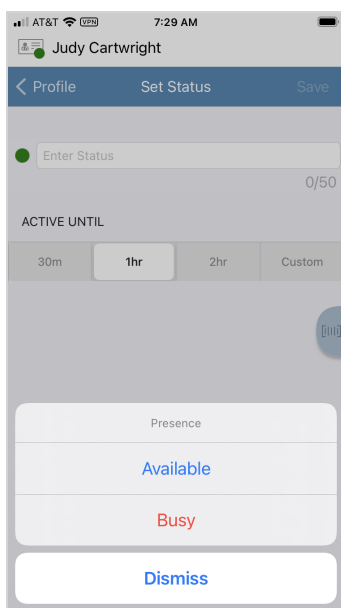
2. Touch the **Presence** drop down menu.



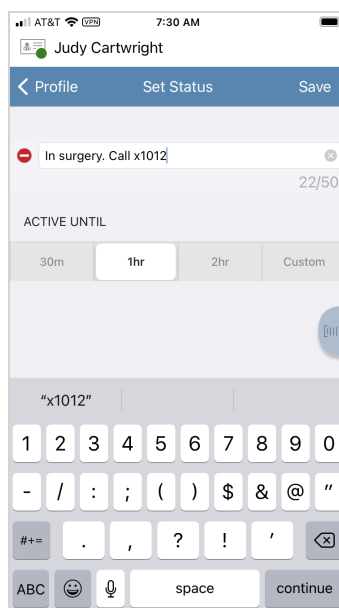
3. Touch the **Presence** icon.



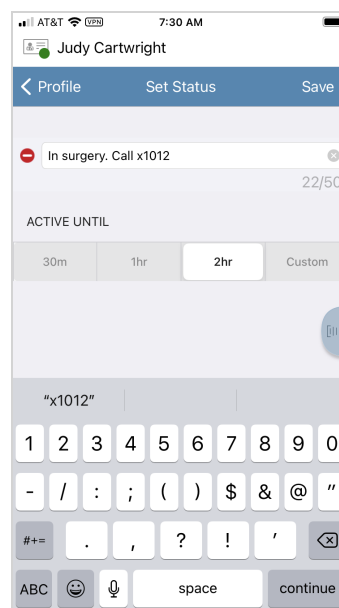
Text descriptions are limited to 50 characters.



4. Touch **Busy**.



5. Optionally, enter a text description of your status. You may enter your whereabouts during "busy" time and also add an extension for others to call while you are busy.

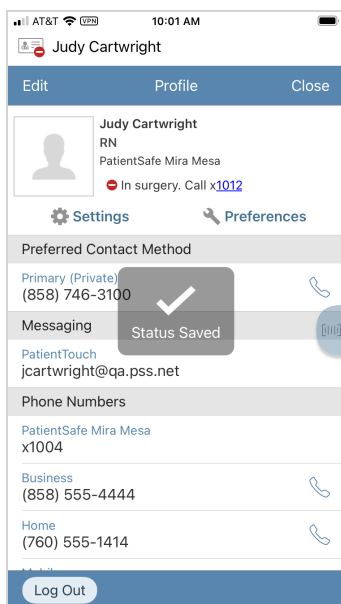


6. Select the time frame for PatientTouch to clear your status. Touch **2hr**.

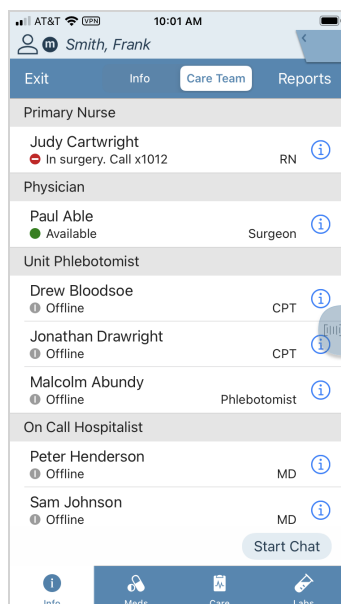
7. Touch **Save**.



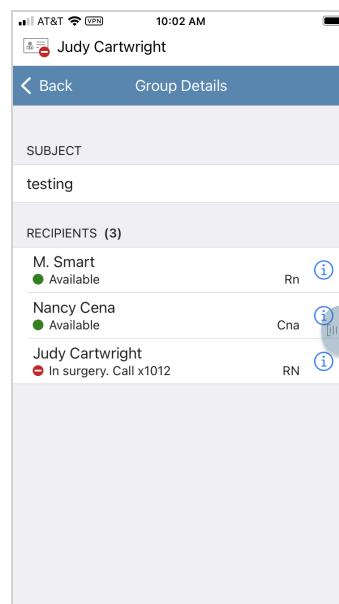
An expiration time is required in order to save your status or update your presence.



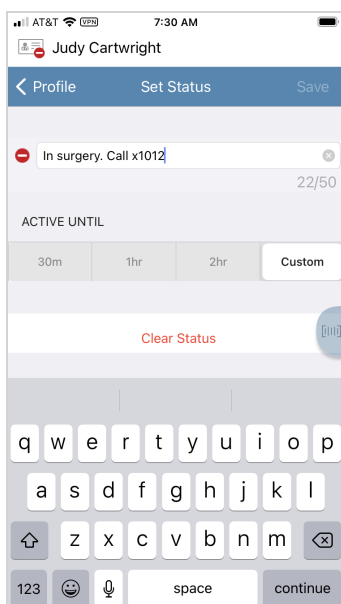
8. Judy Cartwright's status has been saved and after 2 hours her status will return to Available.



9. A user's status displays on many screens including a patient's Care Team....



10. ...and Group Details.



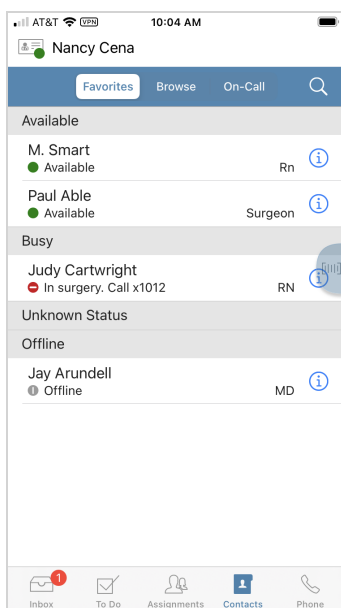
11. Touch **Clear Status** to clear your status

Nancy Cena's Screens

Next, let's see how Judy Cartwright's status appears to other users.

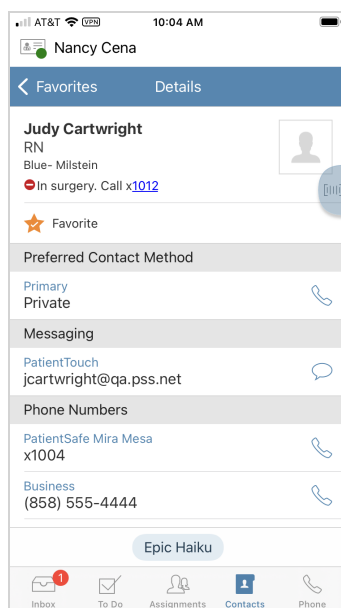


The favorites screen is no longer real time. When Judy Cartwright's presence and status changes, Nancy Cena will only be able to see that change after she refreshes her screen.



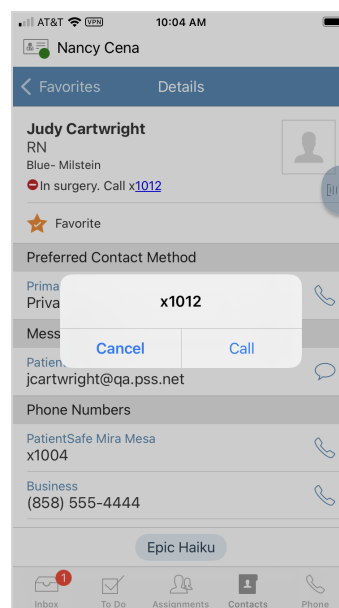
1. Nancy Cena's Contacts>Favorites shows Judy's updated status.

2. Click the **Info** icon to access Contact Details.



3. Contact Details also displays Judy's current status. Touch the extension to call the designated contact.

4. Touch x1012.



5. Touch **Call** to connect with this extension.

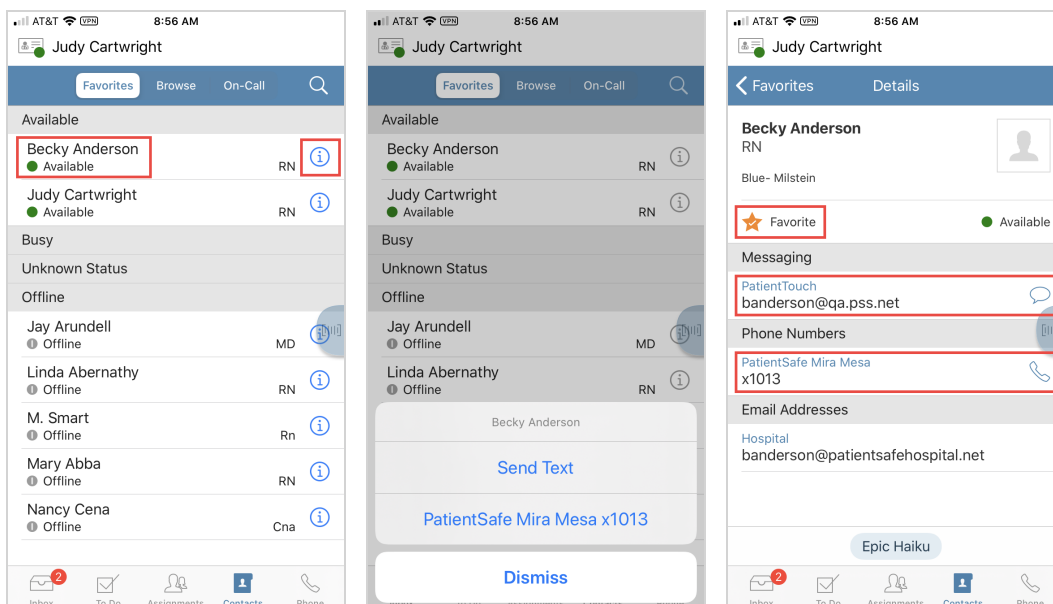
Contacts

Managing Contacts

The Contacts tab provides a variety of methods for which to contact other users within your facility. If you are in a hospital with multiple facilities, the Contacts tab also provides access to contact information for those caregivers.

Favorites

Favorites allows you to create a list of contacts you frequently communicate with.



Favorites displays your list of contacts by status: Available, Busy, Unknown, or Offline.

1. Touch a contact name or the **Info** icon to communicate.

2. Touching a contact name brings up an action sheet with options to send a text or place a call.

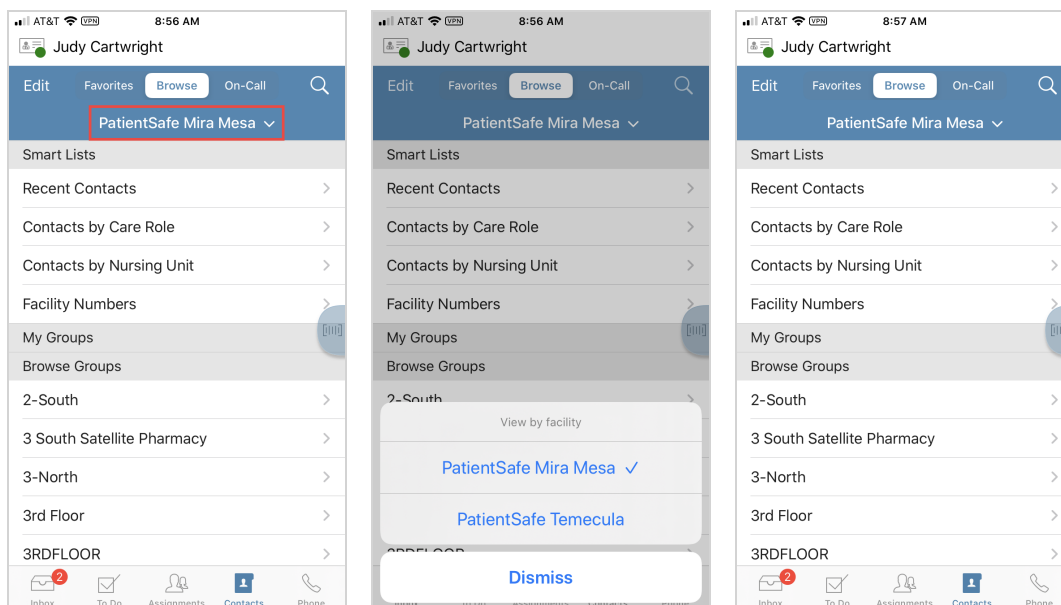
3. Touching the **Info** icon brings up Contact Details, where you can add or remove contacts to your **Favorites** by touching the **Star** icon.

4. Touch the options available to communicate.

Browse

Browse provides multiple options for users to search for and communicate with other caregivers.

More on Browse Groups in the topic "Managing Browse Groups."





1. Touch the **Facility** drop down menu to select the facility for which you want to locate caregivers.

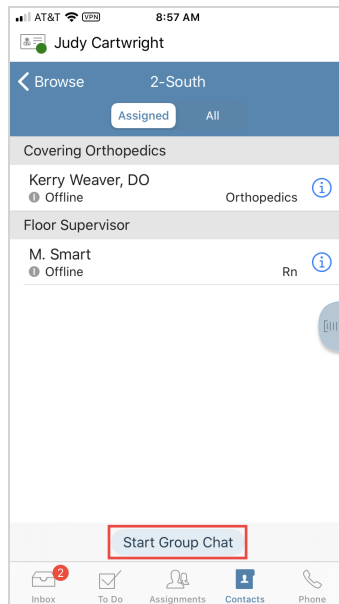
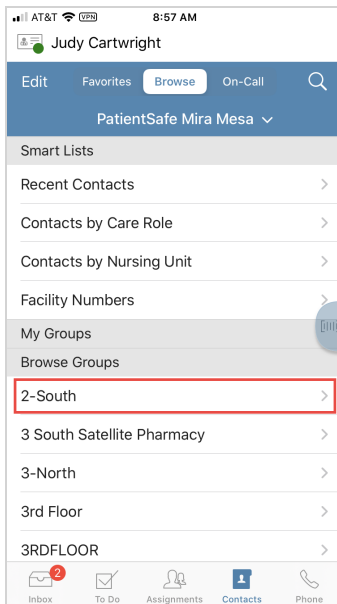
2. Select the appropriate facility.

3. Touch any of the following options to locate caregivers:

- Recent Contacts
- Contacts by Care Role
- Contacts by Nursing Unit*
- Facility Numbers



***Nursing units that have been hidden in Enterprise Manager will not display in Contacts by Nursing Unit.**

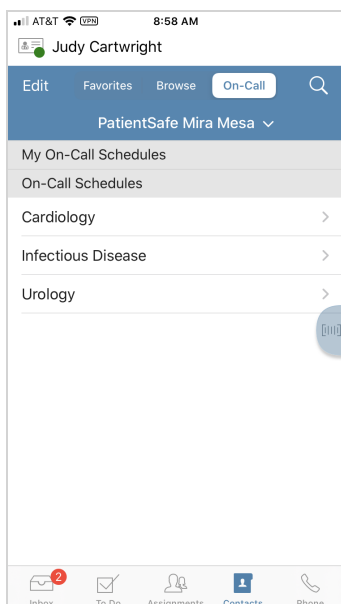


4. Touch a **Browse Group** to see group members.

5. **Start Group Chat** to communicate.

On-Call

The On-Call Pivot only displays if your facility is configured for on call groups. Please refer to the topic "On-Call Scheduling" for more information.



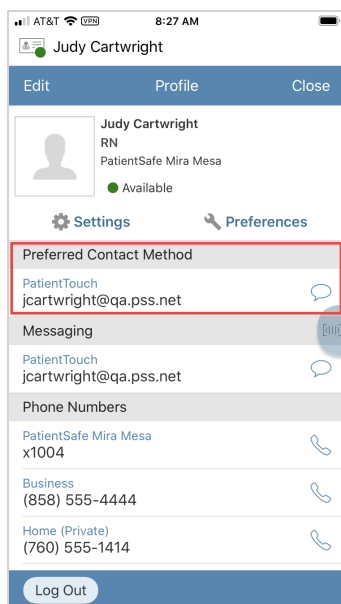
Preferred Contact Method

User preferred contact method is for all users of PatientTouch. This feature lets users indicate how best to reach them.

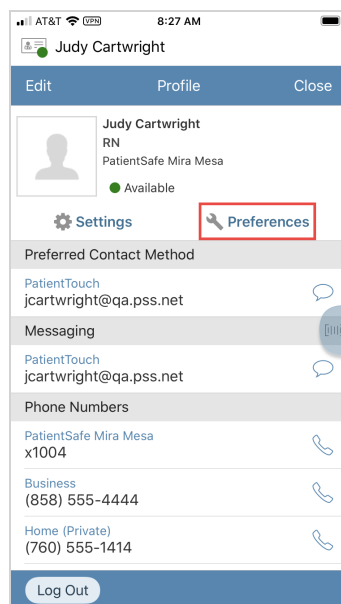
For example, if one user prefers to be contacted by the primary phone number, they may select this option. If, however, another user wishes to be contacted by email, or text message, they may select these options.

Preferred contact method can be set either globally in enterprise manager, or by the individual user through preferences.

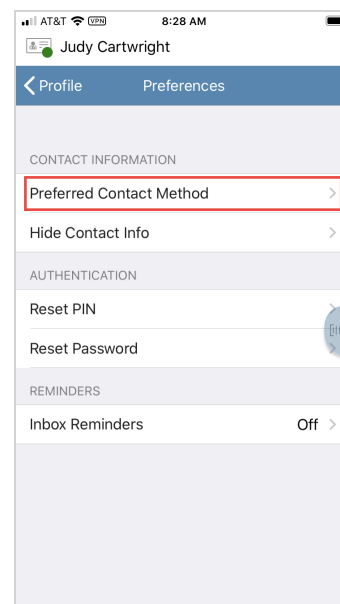
To configure your **Preferred Contact Method** via Preferences, follow the instructions below.



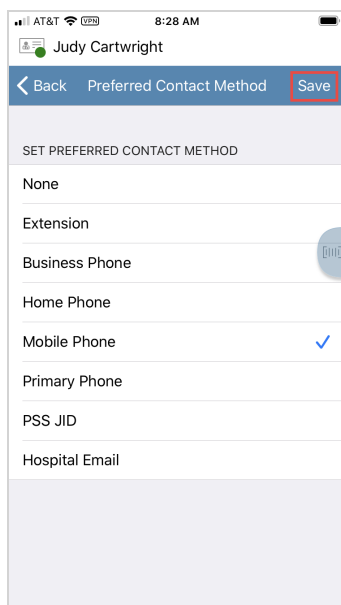
1. The **Preferred Contact Method** displays on the Profile screen.



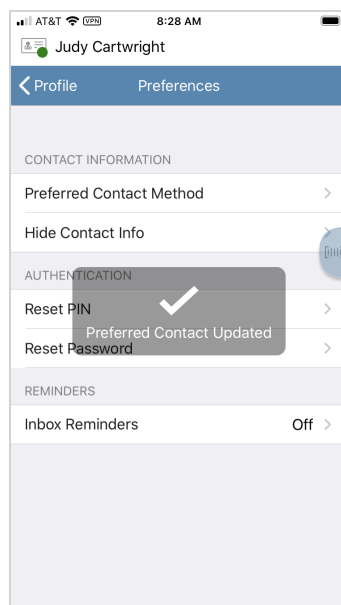
2. To change your preferred contact method, touch **Preferences**.



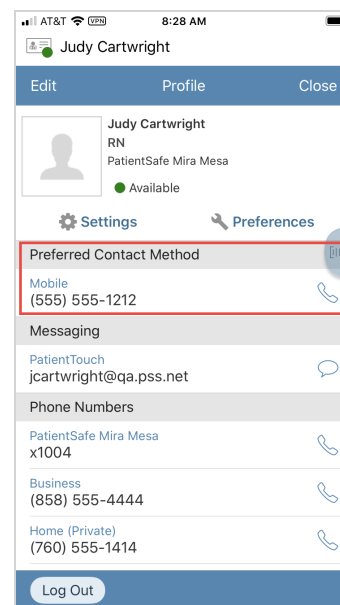
3. Touch **Preferred Contact Method**.



4. Select or change the desired method of communication.
5. Touch **Save**.



6. A check mark displays indicating a successful update.



7. The updated **Preferred Contact Method** displays in the Profile screen. It also displays in Contact Details.



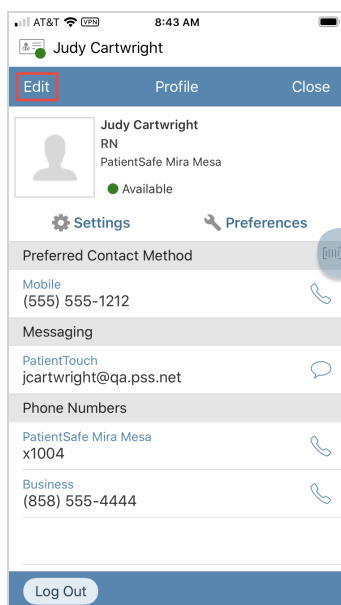
Edit and Hide Contact Info

Physicians and executives may want to edit or remove incorrect or out of date contact information. Or, they may wish to hide their contact information from other users for privacy reasons. PatientTouch provides the ability for each caregiver to do this.

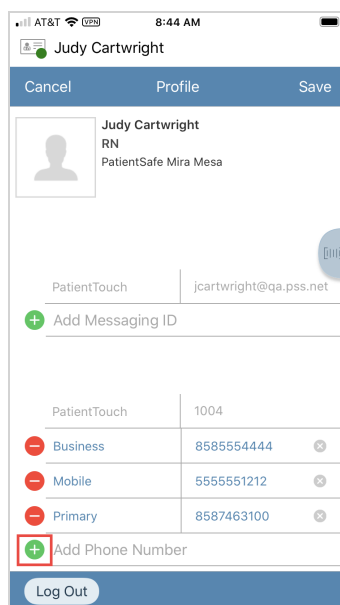
Edit

This feature is primarily targeted at physicians and executives and provides the ability for them to add/edit/remove contact methods. Users must have the Edit Contact Info permission.

To edit your contact information, follow the steps below.

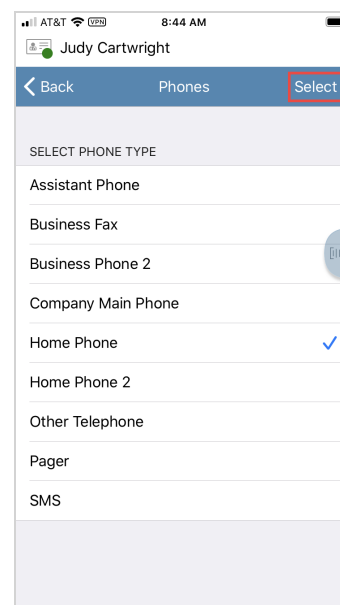


1. From the Profile screen, touch **Edit**.



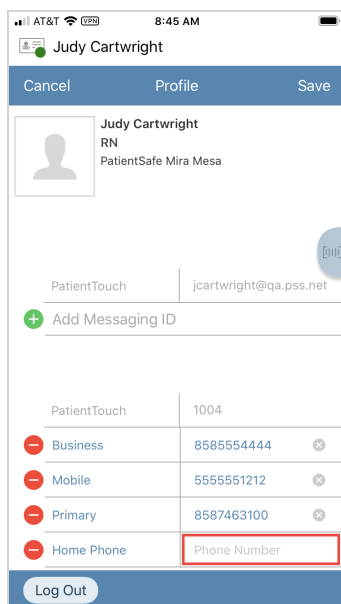
2. Select any of the choices available to modify. Touch the green plus sign to add. Touch the right side field to edit. Touch the red minus sign to delete.

3. For example, touch the green plus sign to add a phone number.

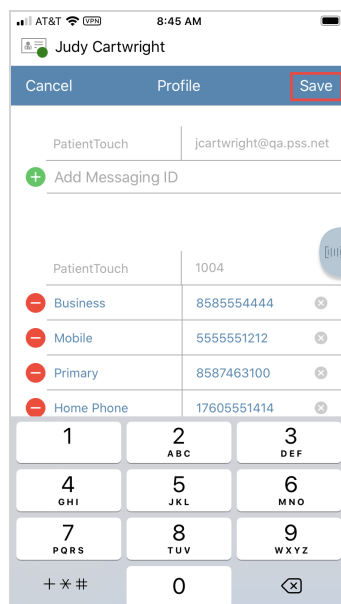


4. Select a type of phone number to add.

5. Touch **Select**.

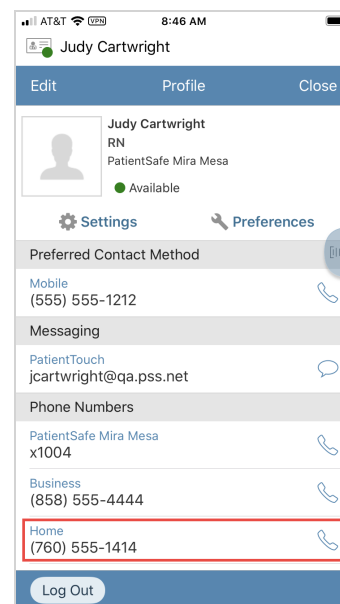


6. Touch the right side field next to Home Phone.



7. Use the keyboard to enter the phone number.

8. Touch **Save**.



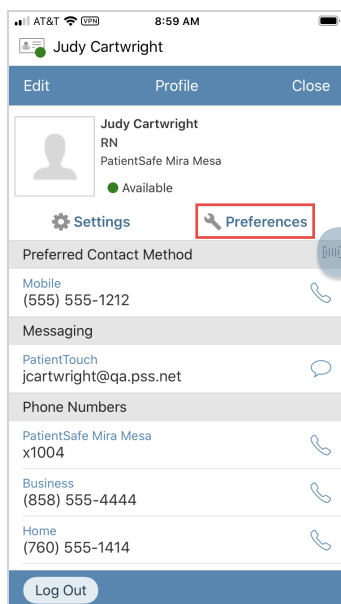
9. The new mobile phone number displays on screen.

Hide

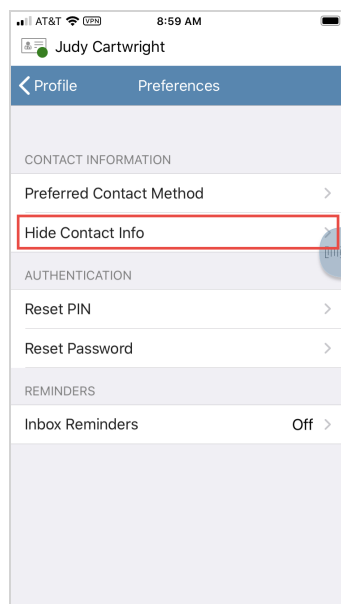
This feature lets users hide their personal contact information while still remaining accessible through the application. For example, physician's and executives may not want other caregivers to see their private phone number.

However, they may still want to be contacted via those means when they are logged into the application. Users can hide their contact information from other users with the Profile tab and the "Hide Contact Info" permission.

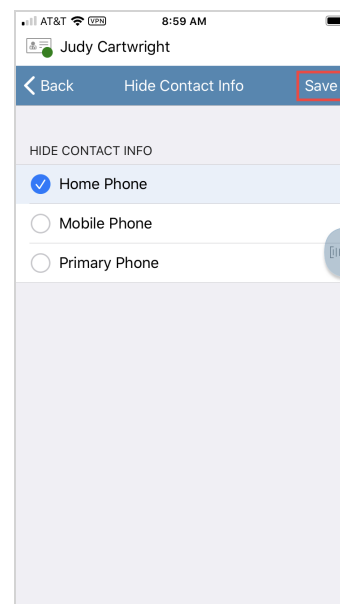
Use the instructions below to hide any of your contact methods.



1. On the Profile tab, touch **Preferences**.

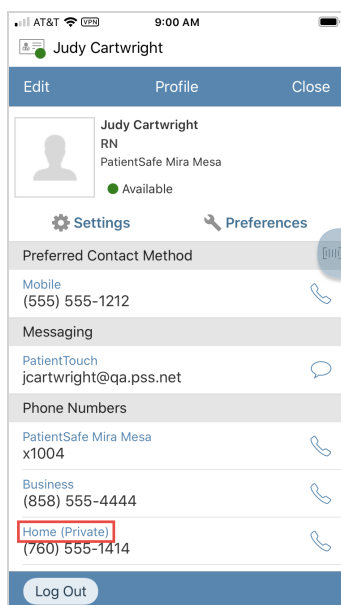


2. Touch **Hide Contact Info**.

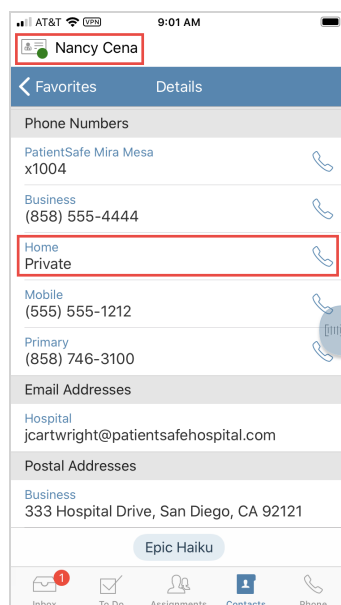


3. Select the phone number(s) you wish to hide from other users. At this time, phone numbers are the only method of contact you can hide.

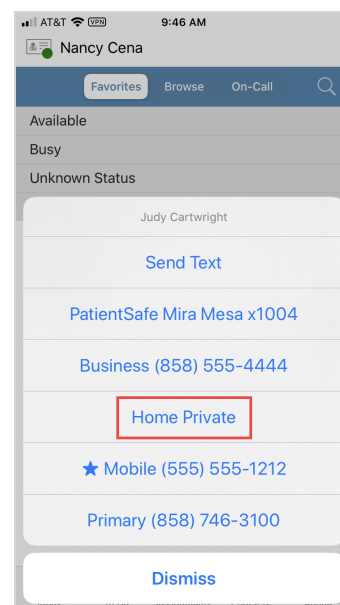
4. Touch **Save**.



5. The hidden contact information displays as "Private" to the user on their own Profile screen.



6. In addition, the Contact Info screen of *another user* displays the "Private" label to indicate the contact information is hidden.



8. When Nancy Cena touches Judy's name from the list of Favorites, the action sheet also displays the "Private" label.

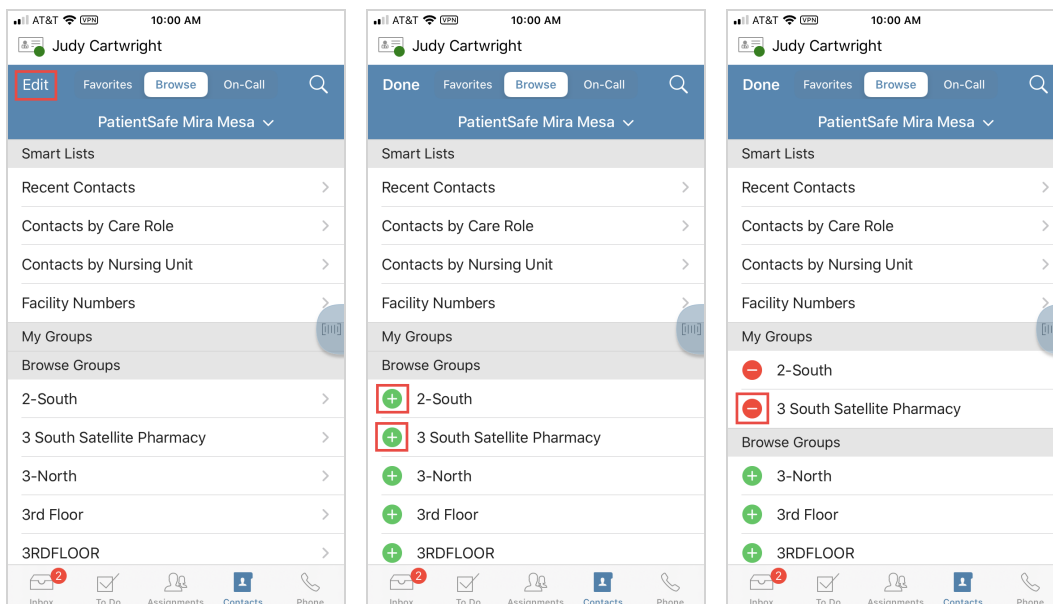


7. If Nancy Cena touches the Phone icon to make a call, the call will go through but the phone number will remain hidden.

Managing Browse Groups

If configured, **Browse Groups** displays organization units like teams or on-call providers.

You can select to add yourself to **My Groups** using **Edit**. **My Groups** provides quick and easy access to all of the teams you want to locate.



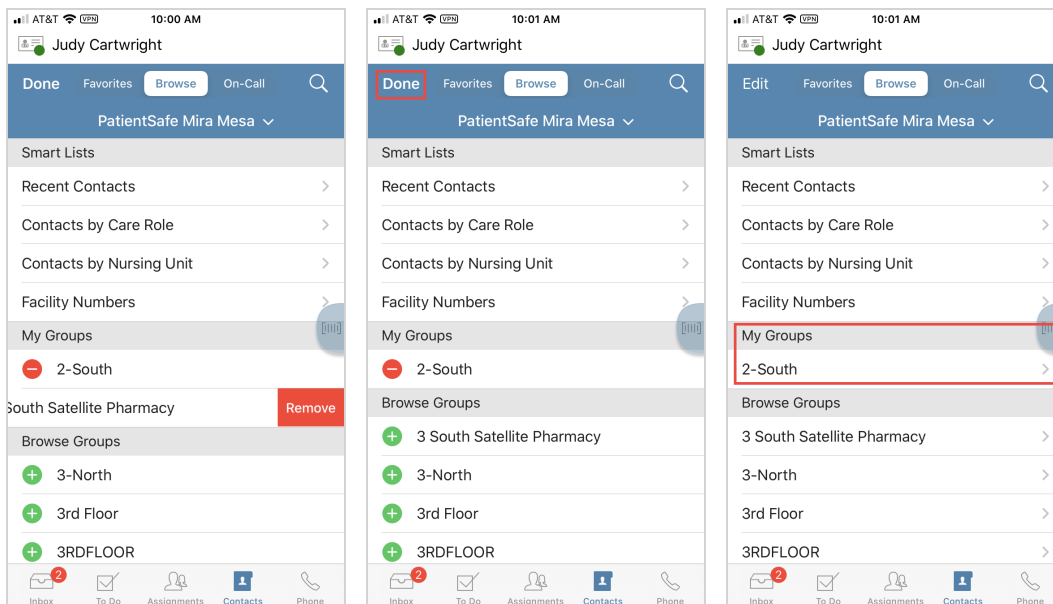
1. Select the **Contacts** tab>**Browse**.

2. Touch **Edit**, which allows you to insert a group under **My Groups**

3. Touch the green insert buttons next to the groups you want to add to **My Groups**.

4. The selected units display under **My Groups**.

5. Touch the red remove button to remove a group.



6. Touch **Remove**.

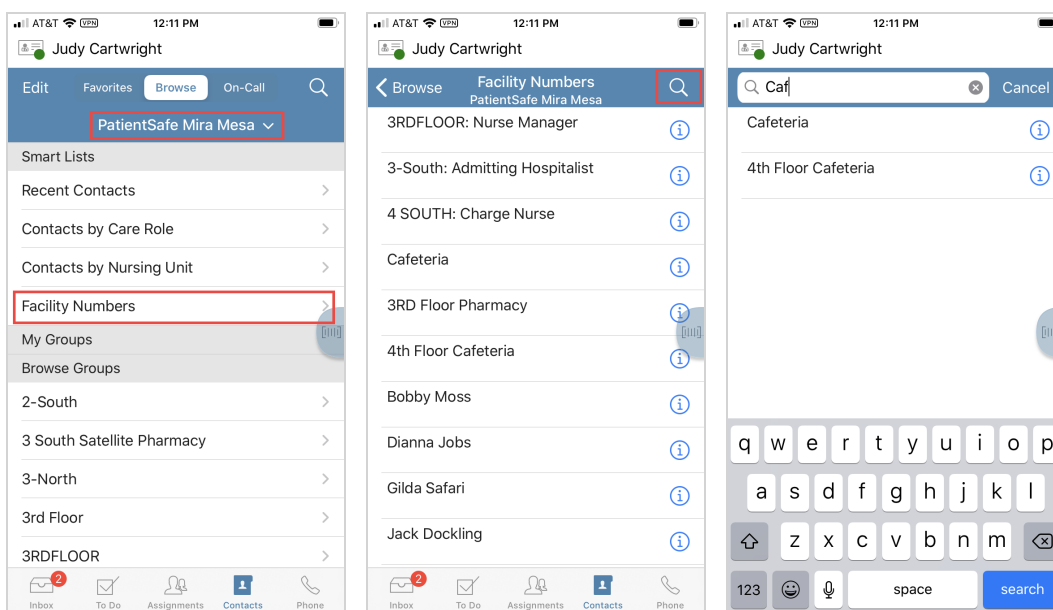
7. Touch **Done**.

8. The newly selected **Browse** Group displays under **My Groups** for easy access.

Facility Numbers

Multi-facility hospitals may have contact numbers specific to each facility that users need to view and access. For example, User A may need to reach a nursing unit in Facility A. Facility Numbers provides an efficient method for locating numbers within a specific facility.

Please follow the instructions below to learn about Facility Numbers.



1. Select the desired facility

3. Touch the contact name or

5. Enter the name of the



from the **Facilities** drop down menu.

2. Touch Browse > **Facility Numbers**.

Info(i) icon to see details.

4. Touch the **Search** icon to locate a contact within the selected facility.

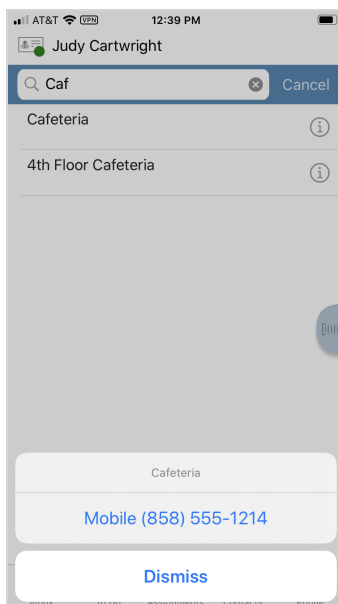
contact you are trying to reach.



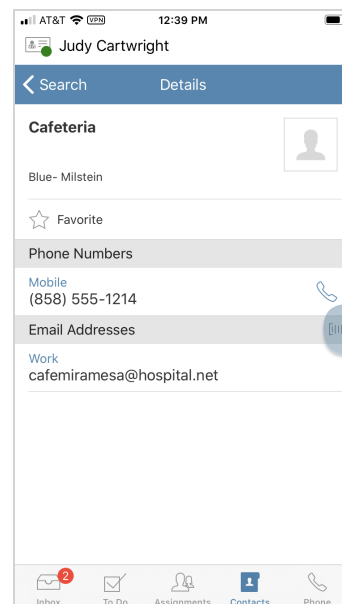
Clicking the magnifying glass within facility numbers will return numbers only within that facility.



Clicking the magnifying glass outside of facility numbers will universally search across all contacts. This search returns a mix of caregivers, address book entries and care role forwarding numbers.



6. Touch the contact name to display an action sheet with contact data.

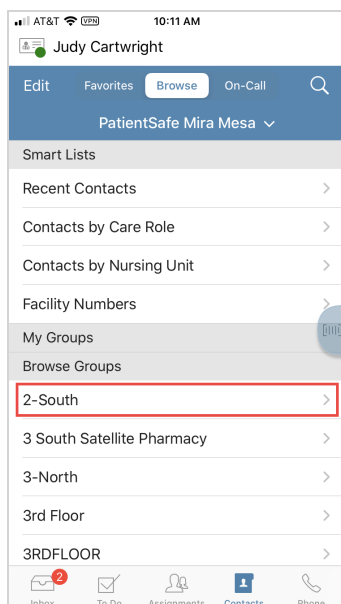


7. Touch the **Info (i)** icon to see contact details.

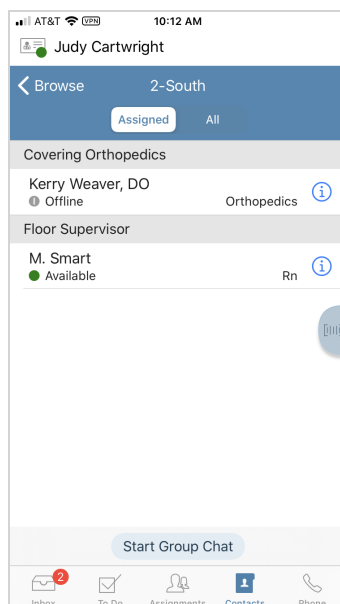
Assigned & All Pivots

PatientTouch Communications provides the **Assigned** pivot to view "assigned" caregivers in a Care Role, Nursing Unit, or Browse Group.

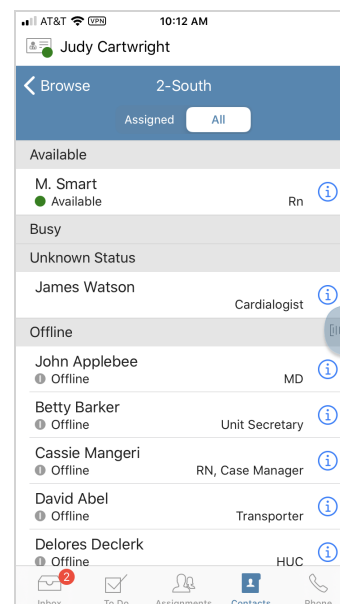
Touch the **All** pivot to view "all" caregivers who could be assigned to one of these groups.



1. Touch the desired **Browse Group**.



2. The **Assigned Pivot** displays all of the *assigned* members of this browse group.



3. The **All Pivot** displays all caregivers who *could be assigned*.

On Call Scheduling



You must have On-Call Integration configured in the Enterprise Manager to use this feature. Please contact PatientSafe Solutions Technical Support team for more information.

On Call Schedules are for system administrators and schedulers. This feature lets organizations configure an integration with an on-call scheduling system such as AMiON.

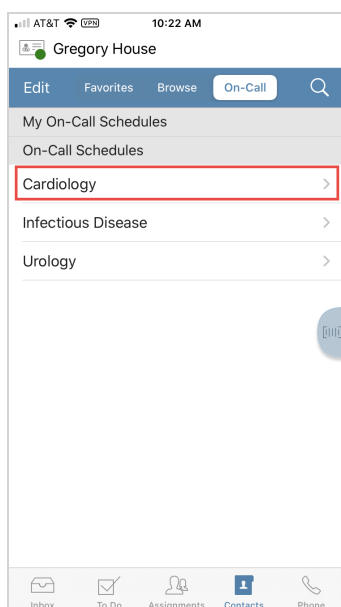
PatientTouch Communications On-Call Schedules allow caregivers to easily find who is currently on-call as well as look ahead to future on-calls for the next shift and the next few days after. Caregivers who go on-call can also see their own schedule within the app.

If your site is setup for **On Call Scheduling**, you will see the **On-Call** pivot at the top of the Contacts screen. If your site is not setup for On Call Scheduling, you will only see Favorites and Browse.

To learn more about On Call Schedules, please follow the instructions below.

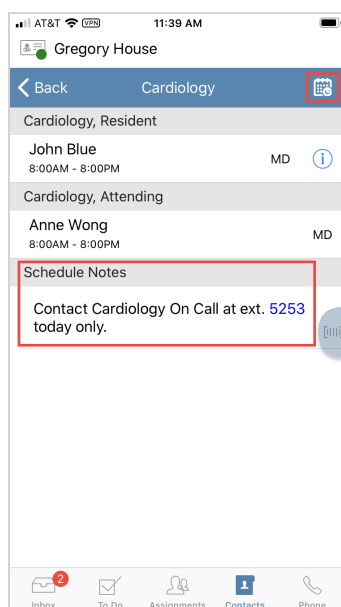


Contacts Tab



Select the schedule you want to view from the list.

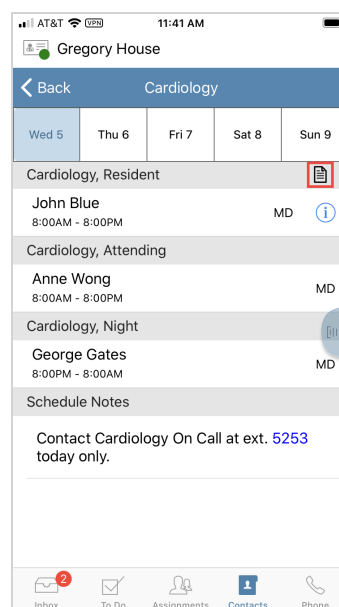
1. Touch **Cardiology**.



2. A list of caregivers who are currently on-call display.

3. If there are any **Schedule Notes**, they display here at the bottom of the screen.

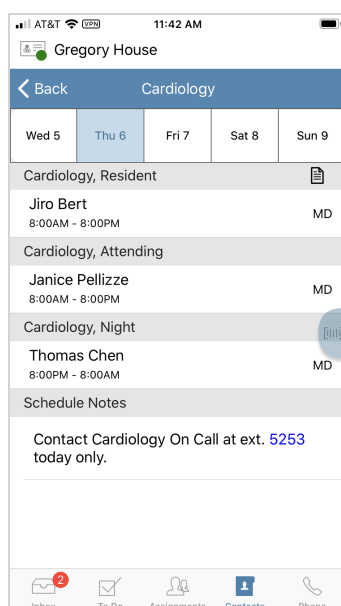
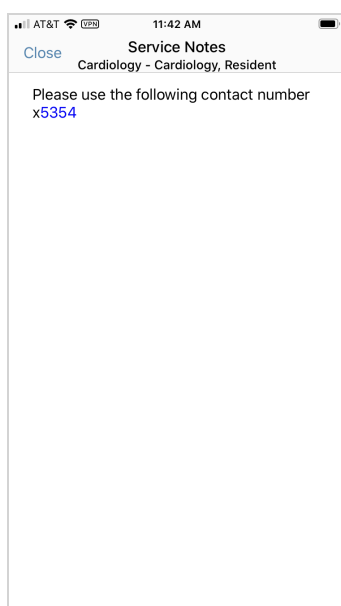
4. Touch the **Calendar** icon to see who will be on call next.



5. The calendar displays who will be on call for that day plus the next four days.

6. Touch a name or Info (i) icon to communicate.

7. Touch the **Service Note** next to Cardiology, Resident to read it.





8. The **Service Note** indicates the number to use to call the caregiver. Service notes will vary.

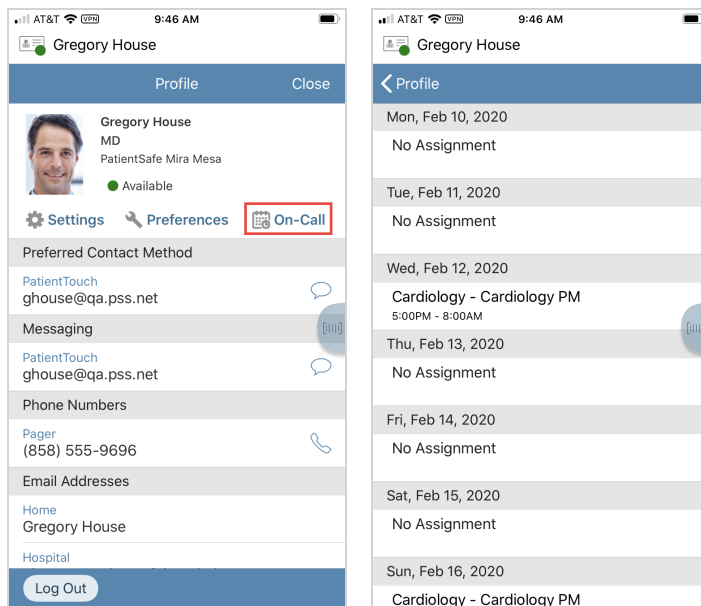
9. Touch the next day (Thu 6) to see who is on call that day.

Note: If a shift has ended, the contact data for that user will be grayed out.

Profile Tab

Physicians, or anyone else who has on call responsibilities, can view their own schedule.

Users will see **On-Call** at the top of the **Profile** screen.

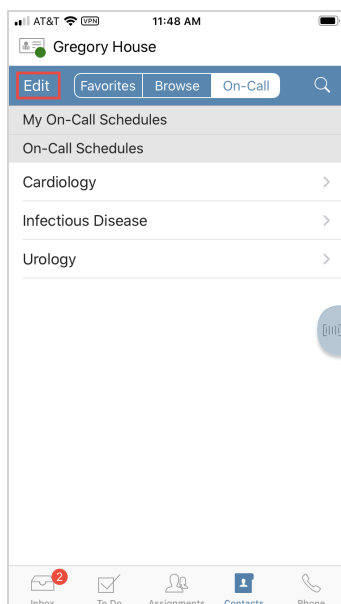


1. Touch **On-Call**.

2. The schedule displays for the next 7 days.

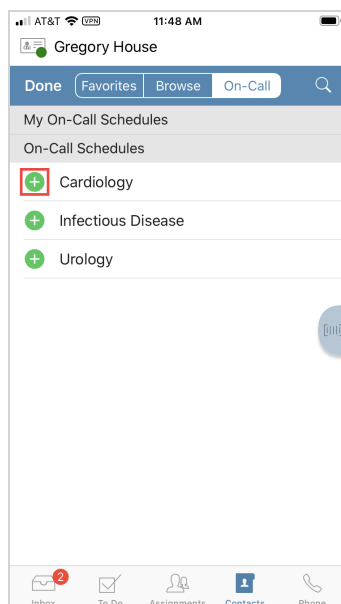
My On-Call Schedules

My On-Call Schedules provides quick and easy access to on-call schedules that you frequently view.

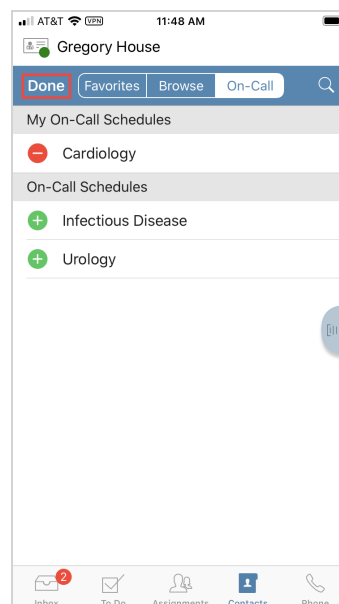


Edit allows you to insert a schedule under **My On-Call Schedules**.

1. Touch **Edit**.

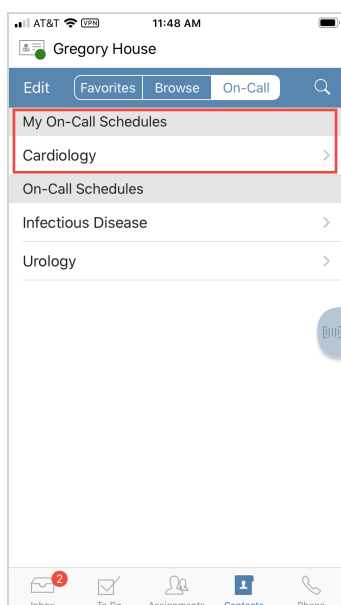


2. Touch the green insert button(s) next to the schedule(s) you want to add.



3. The selected unit displays under **My On-Call Schedules**.

4. Touch **Done**.



5. The newly selected schedule displays.



Facility Indicator

This feature is targeted at multi-facility sites that have caregivers who work at multiple facilities and therefore have multiple extensions and DIDs.

Facility Indicator is an enhancement that adjusts the action sheet and adds an indicator to the facility where the callee last logged in and registered to a voice server. Users must still be actively connected to the voice server for their facility to receive a call.

For caregivers working in multi-facility sites, this will reduce the number of extensions and phone numbers shown on the action sheet when calling users with extensions. On the contact detail screen, "Current" is displayed next to the facility the user is logged into so caregivers can quickly identify the location and extension of the person they are trying to reach.

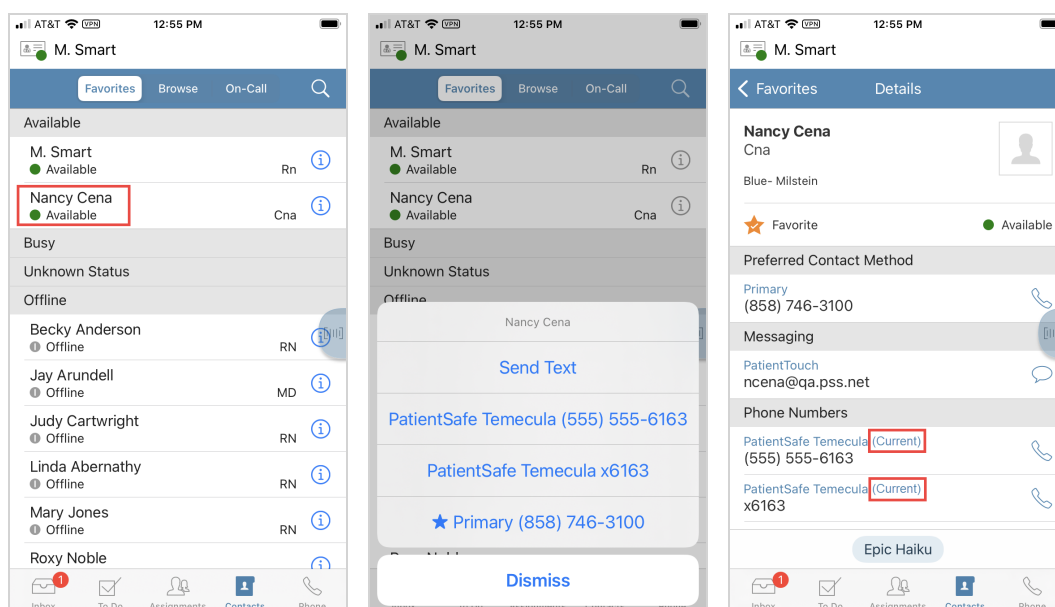
Single facility sites will not see any changes.

Please see the examples below for more details.

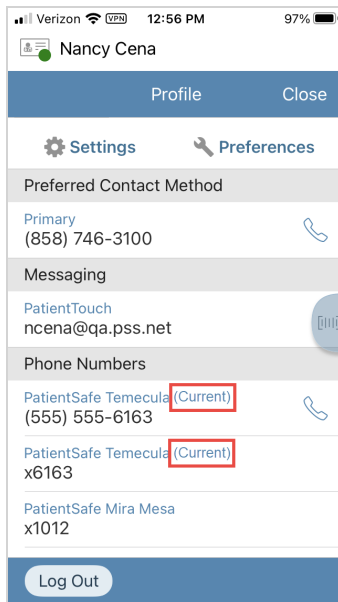
Configuration

Users must have the correct facility code entered in their device Settings.

Multi-Facility Sites



1. From **Contact>Favorites**, touch the name of the person you are trying to contact.
2. As the action sheet shows, Nancy Cena is logged into the Temecula facility and you may contact her via text message, phone number, extension, or primary phone number.
3. On Nancy Cena's Contact Details, all of her extensions and phone numbers display.
4. For the facility she is logged into, "Current" displays next to the facility name and displays on the top of the list of Phone Numbers.



5. Ms. Cena's own Profile tab shows "Current" next to the facility she is logged into.

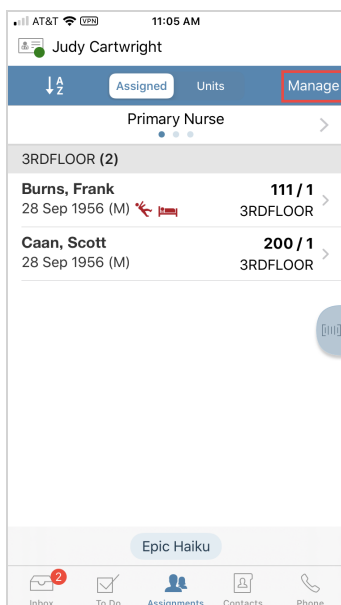
Managing Assignments

Orchestrating Your Assignments

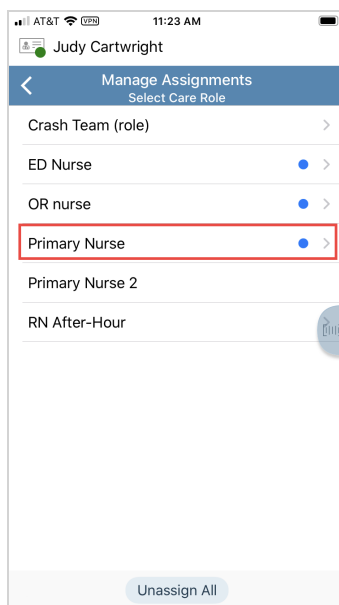
Users with the appropriate permissions can manage assignments. You can assign patients, locations, and nursing units using the Enterprise Manager, Clinical Manager and the PatientTouch application. The process of assigning and un-assigning using the mobile application is described below.



Assigning_Unassigning Patients

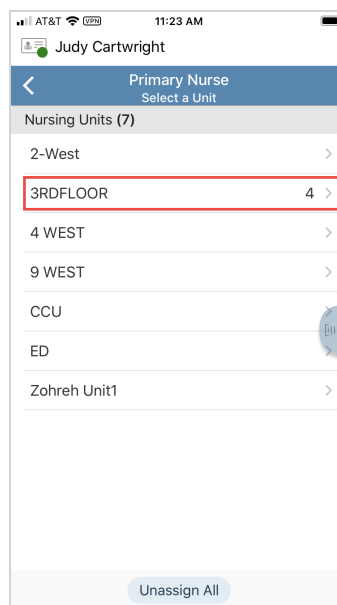


1. From the Assignments tab, touch **Manage** to add/remove patients from your list.

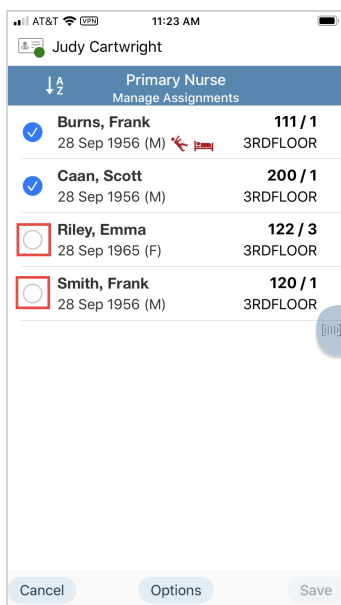


2. Select the care role for which you want to manage assignments.

Note: Touch **Unassign All** to remove assignments from all Care Roles.

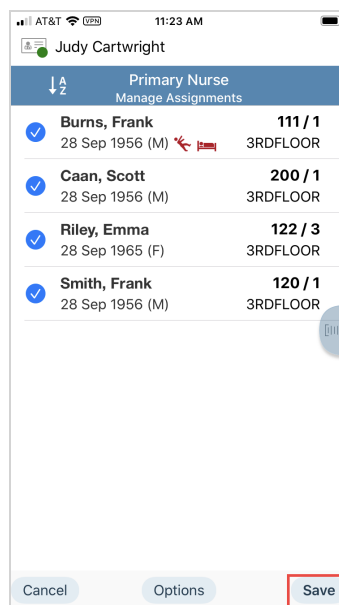


3. Select the specific nursing unit to which the patients are assigned.

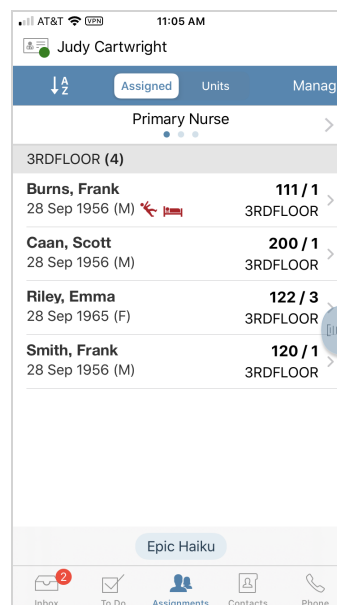


4. Select the radio button next to the patient names.

Note: To unassign a patient, deselect the radio button.



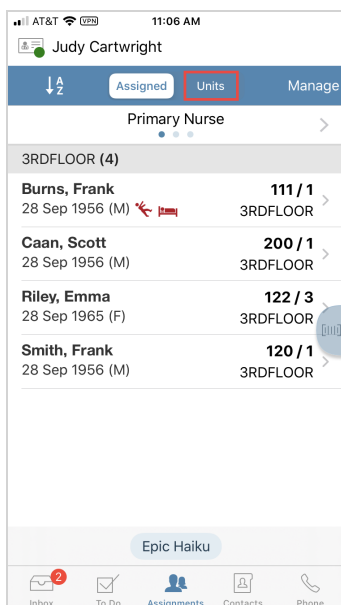
5. Touch **Save**.



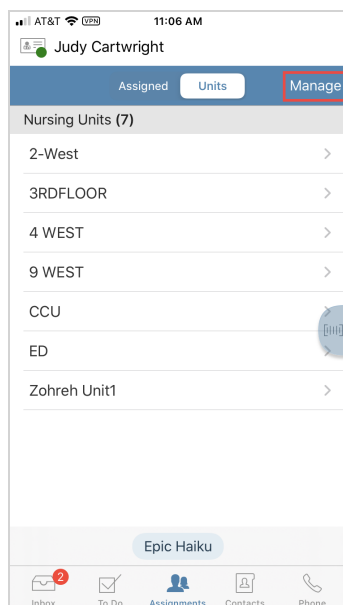
6. All of your assigned patients display.



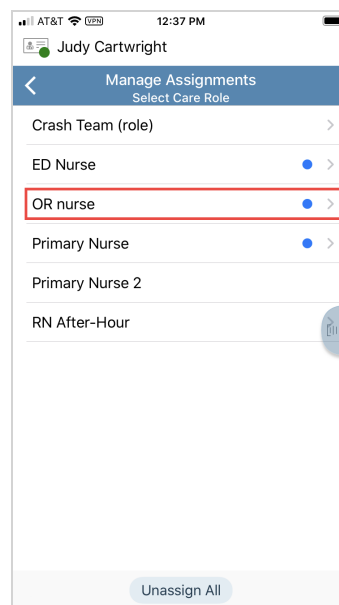
Assigning Locations



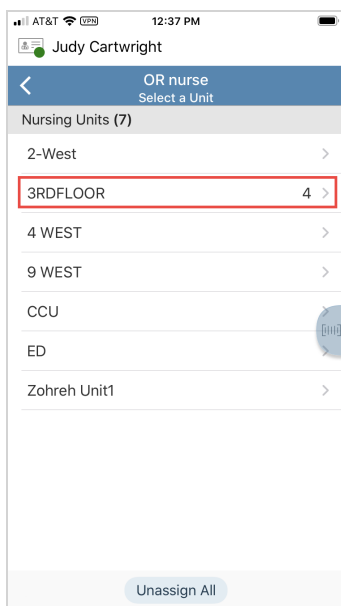
1. Touch **Units** to assign rooms or beds.



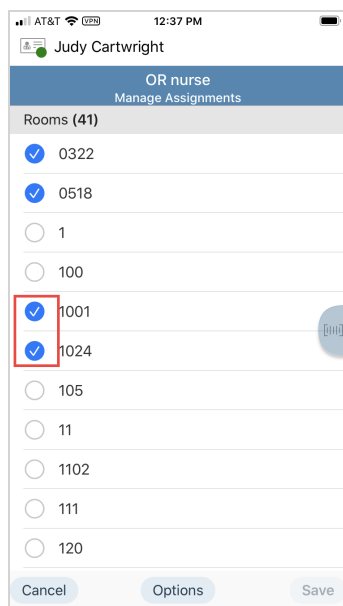
2. Touch **Manage**.



3. Select a **Care Role**.



4. Select a nursing unit.



5. Select the desired room numbers to assign these locations to yourself. Deselect room numbers to remove these locations.

6. Touch **Save**.

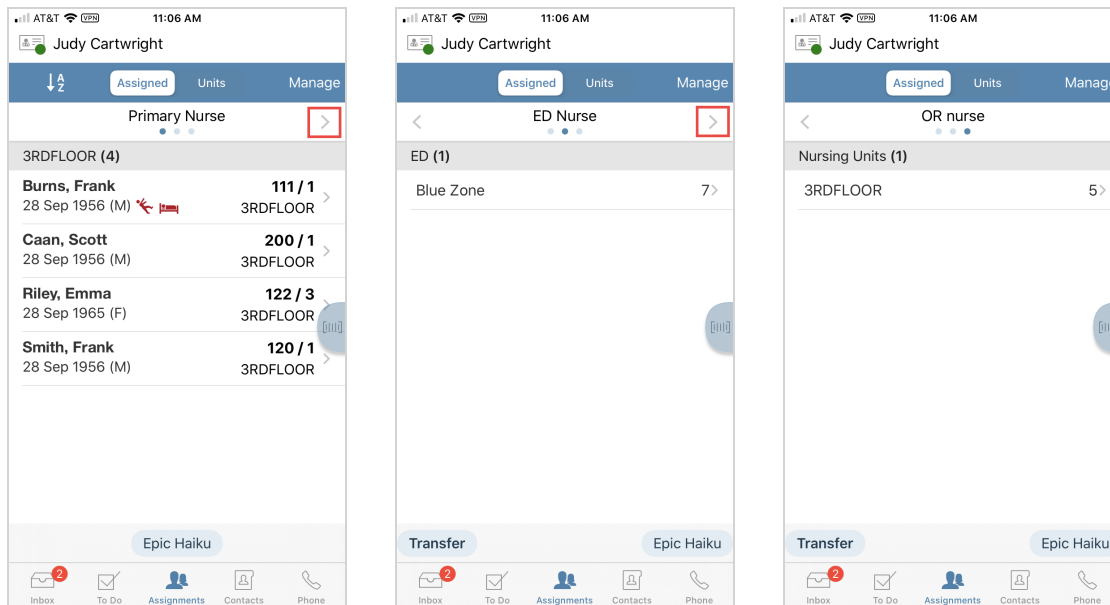
7. Touch **Options** to



Select/Deselect All.

Multiple Care Roles

The user below is assigned to multiple Care Roles (Primary Nurse, ED Nurse, and OR Nurse). Two of the Care Roles (ED Nurse and OR Nurse) have been assigned to an organization unit while the Primary Nurse Care Role has been assigned to patients. The screens below show how they display in the Assignments tab.



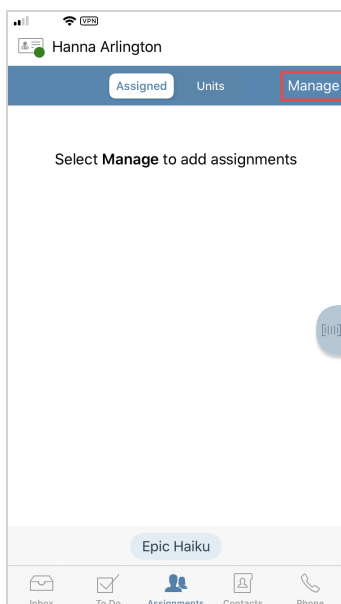
1. The Primary Nurse Care Role is assigned to patients.
2. Touch the right arrow to see the other assigned care roles.
3. The ED Nurse is assigned to an Organization Unit.
4. Touch the right arrow to see the other assigned care role.
5. The OR nurse Care Role is assigned to an Organization Unit.

Restricting Assignments

Care Roles have the ability to be "restricted" so that the assignments for the care role cannot be modified when they are using an on-call scheduling system.

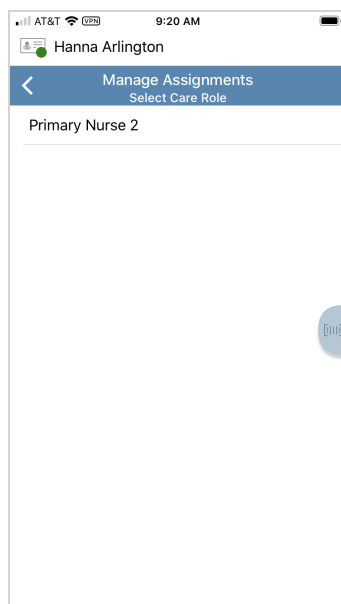
The functionality of Assignments will differ, if one or more care roles have the "Restrict Assignment Management" selected in the Enterprise Manager.

In the example below, the Primary Nurse 2 Care Role has the restricted flag.



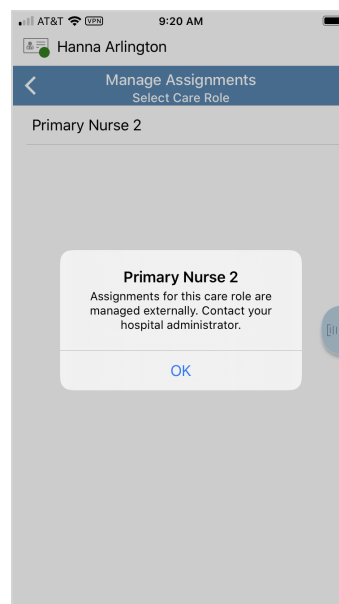
1. When caregivers have the "Restrict Assignment" flag on their assigned Care Role, they will not be able to manage their assignments.

2. Touch **Manage** to see the behavior on the handheld.



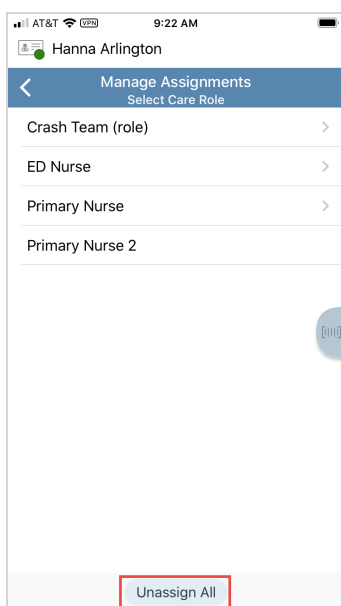
3. If users have only one care role and it has "Restrict Assignment" flag, then the **Unassign All** button will not display.

4. Touch **Primary Nurse 2**.

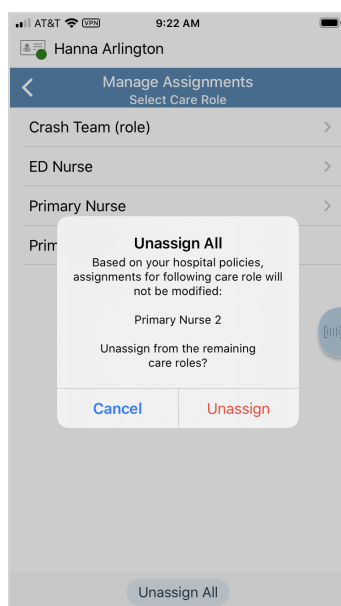


5. A message displays stating that the assignments for this care role are managed externally.

6. Touch **OK** to return to the **Assignments** tab.



1. If users have multiple care roles and one of them has "Restrict Assignment" flag, then touching **Unassign All** should only unassign care roles without flag.



3. A message displays stating that the assignments for the care role with the "Restrict Assignment" flag will not be modified.



2. Touch **Unassign All**.

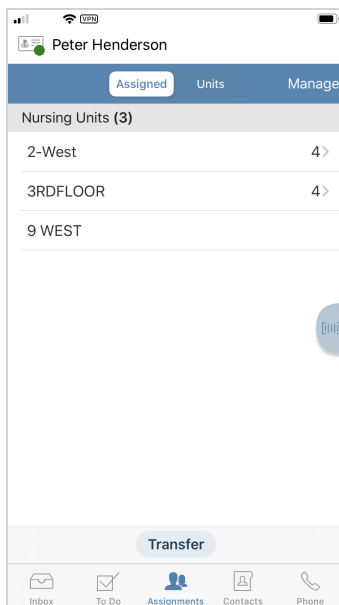
4. To unassign patients from the other care role, touch **Unassign**.

Transferring Assignments

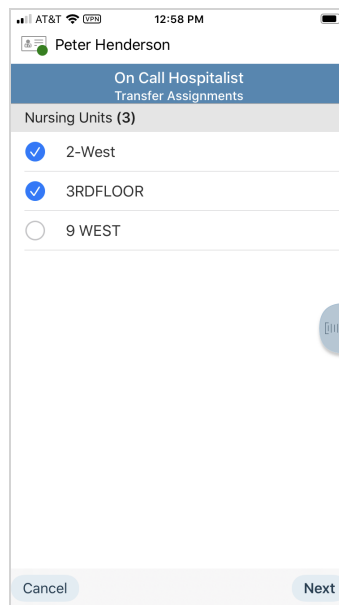
Caregivers can transfer their assignments to another caregiver. This may be useful for Care Roles like On-Call Hospitalist who may want to transfer assignments to the Admitting Hospitalist.

Users must have the "Assignment Transfer" permission in order to transfer assignments.

On-Call Hospitalist

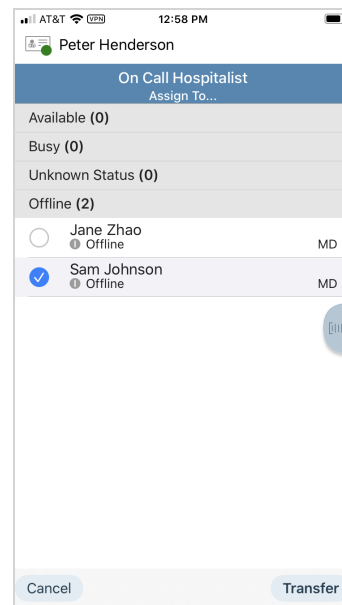


1. From the Assignments tab, touch **Transfer**.



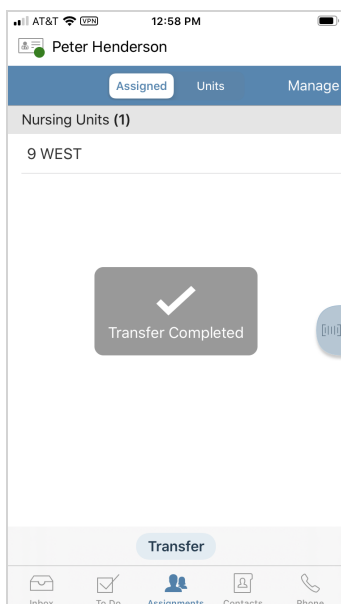
2. The nursing units display that are ready for transfer. If desired, deselect a unit.

3. Touch **Next**.



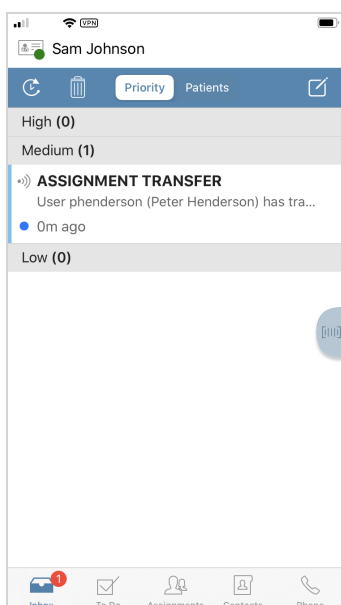
4. Select the recipient of the transfer. In this case, it is the Admitting Hospitalist.

5. Touch **Transfer**.

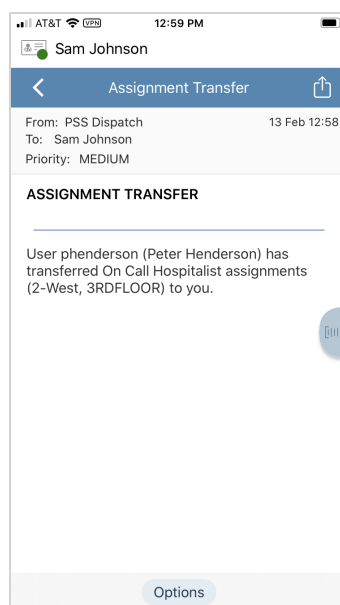


6. A check mark displays indicating a successful transfer.

Admitting Hospitalist



1. The recipient of the transfer receives an Inbox message.
2. Touch the message summary.



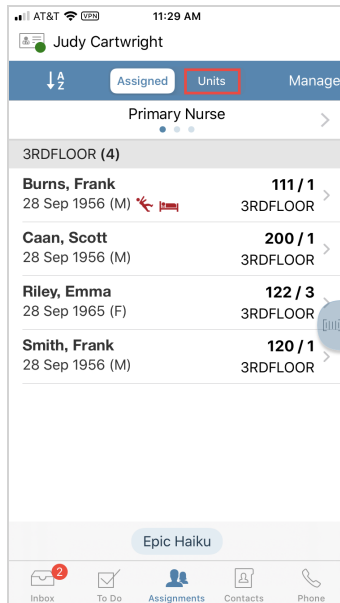
3. The details of the assignment display.



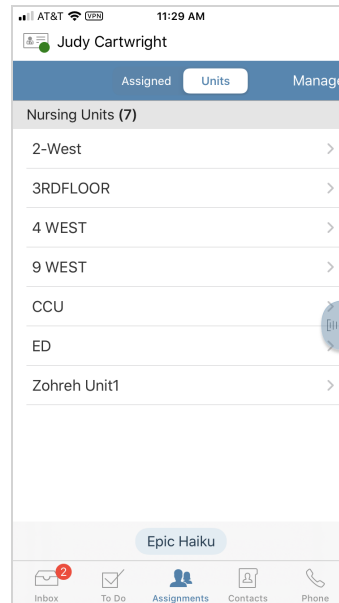
Filter Empty Beds

PatientTouch Communications has a filter that allows users to hide or display empty beds. This feature may help prevent users from scrolling too much if their hospital has a lot of nursing units with empty beds.

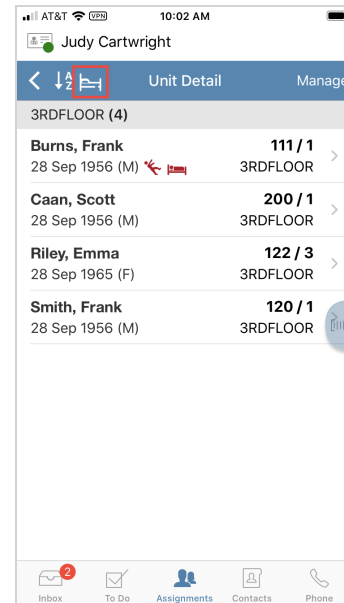
To hide or display empty beds, follow the instructions below.



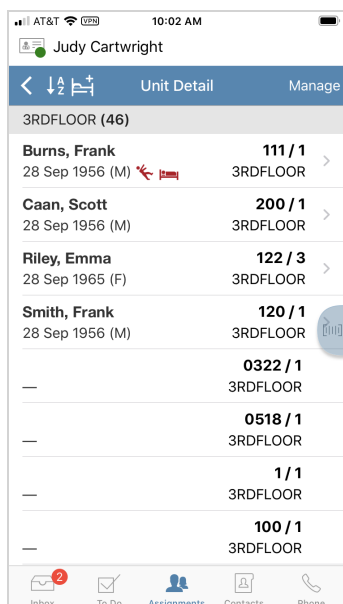
1. From the Assignments tab, touch **Units**.



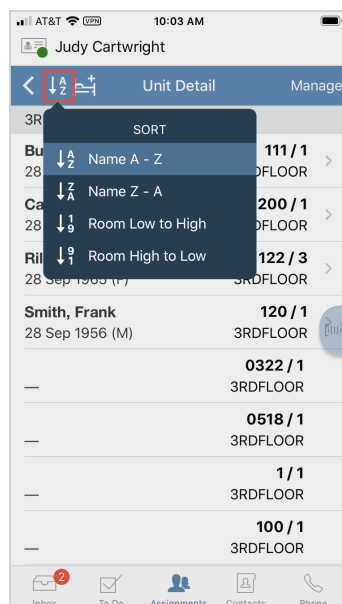
2. Select the desired nursing unit for which you want to display empty beds.



3. Touch the **Bed** icon.



4. All of the empty beds for this nursing unit display.

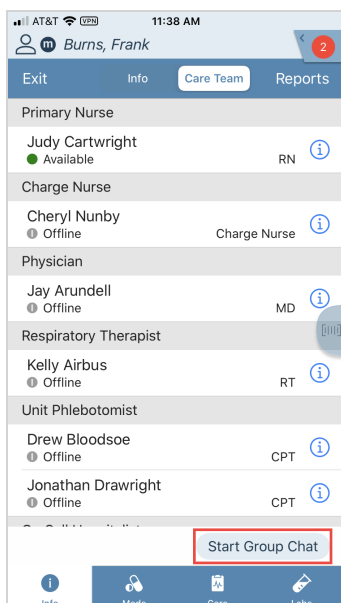


5. Touch the **Sort** icon to display beds in ascending or descending order.

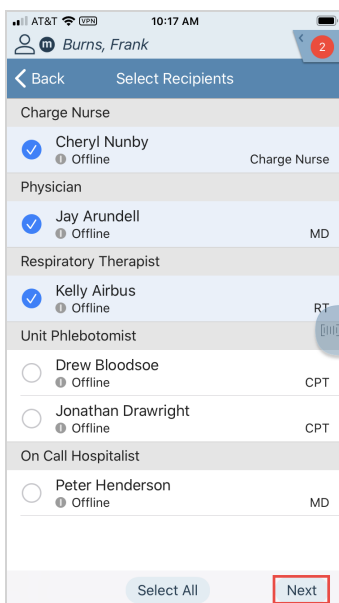
6. Or, select to display patients in alphabetical order.

Partial Care Team Group Chat

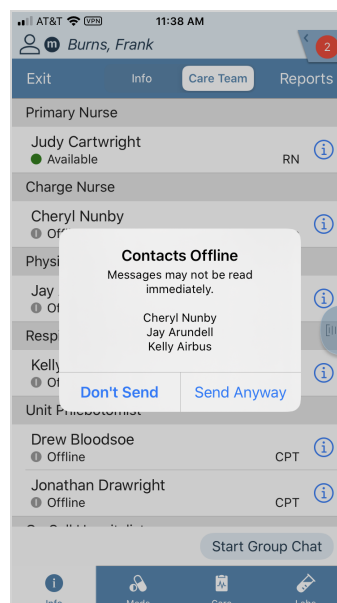
Use **Group Chat** to send a text message to all or only selected care team members.



1. From the Assignments tab, select a patient and click the



3. The list of care team members displays.



7. If configured, a **Contacts Offline** message displays indicating that not all members



Care Team pivot. The **Care Team** displays all members of the patient's care team.

2. Touch **Start Group Chat** to send a message to **Care Team** members.

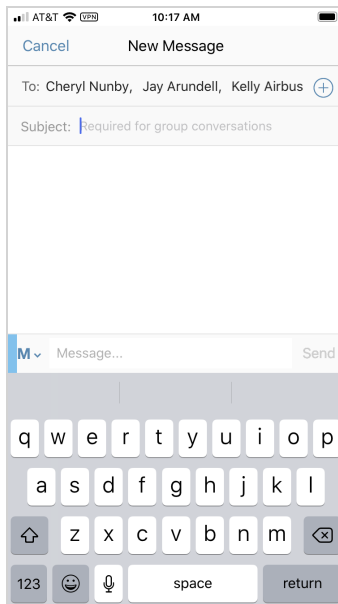
4. Touch **Select All** to send a message to all members.

5. Or, select the empty circle(s) next to the members you want to contact.

6. Touch **Next**.

are online.

8. Select **Don't Send** or **Send Anyway**.



9. Compose your message to the selected recipients.

Hidden Nursing Units

Background

Marking a nursing unit as “hidden” hides the nursing unit from displaying in the client applications and Enterprise Manager in browse and assignment flows. It does not remove the nursing unit or any of the patients in the nursing unit from the system.

Configuration

To hide a nursing unit, navigate to Enterprise Manager>Configuration>Organization Units>Select the Nursing Unit>Click the check box "Hide Nursing Unit."

User Experience

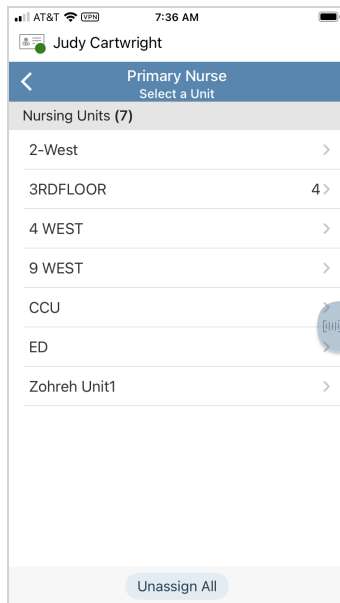
Hidden nursing units display differently for direct care roles vs indirect care roles. Please see the details below to learn more.

Direct Care Role Assignments

If a caregiver in a direct care role assignment (care role assigned to a patient) has an assignment to a patient in a hidden nursing unit, we will display the assignment to allow for unassignment.

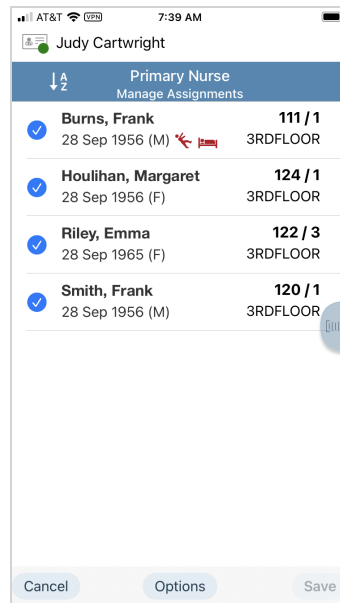


Unassigning Patients from a Hidden Nursing Unit

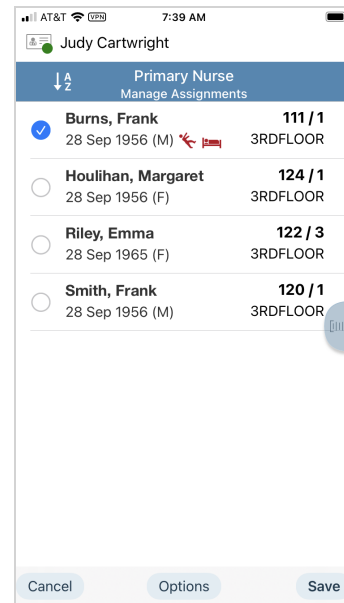


1. 3RDFLOOR is the hidden nursing unit. This unit still displays to allow unassignments.

2. Touch 3RDFLOOR.

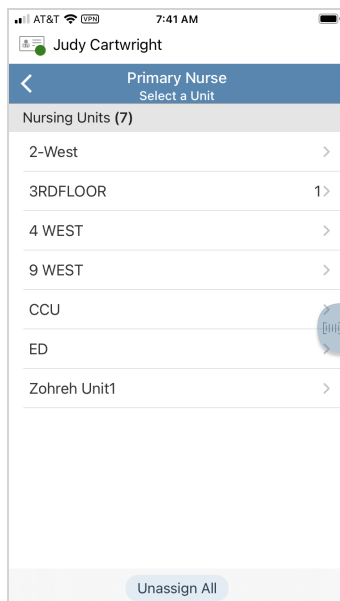


3. Deselect the patients to unassign.

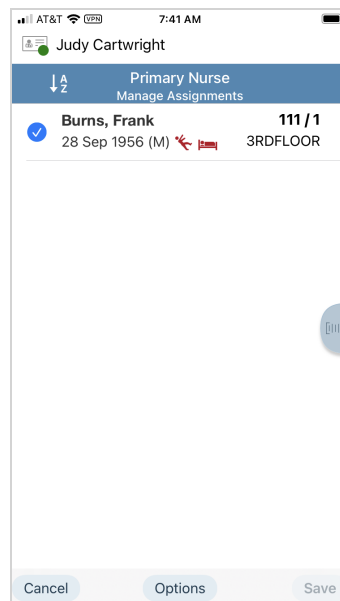


4. Touch **Save**.

Once they have been unassigned, patients do not show up again to re-assign when the nursing unit is hidden.



5. If the same caregiver attempts to reassign patients who are in a hidden nursing unit, the unit still displays.

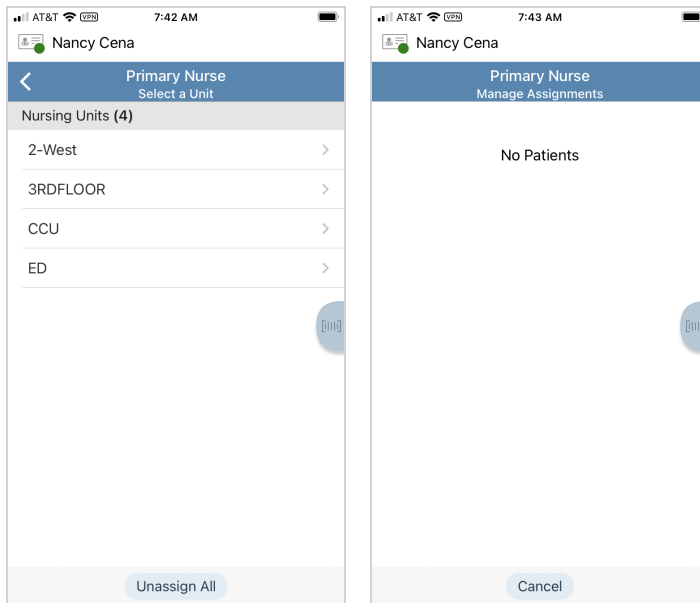


6. But only patients who are still available to unassign display.



Another Nurse Attempts to Assign to Patients in Hidden Unit

If another caregiver attempts to assign to patients that are located in a hidden nursing unit, the patients do not display.



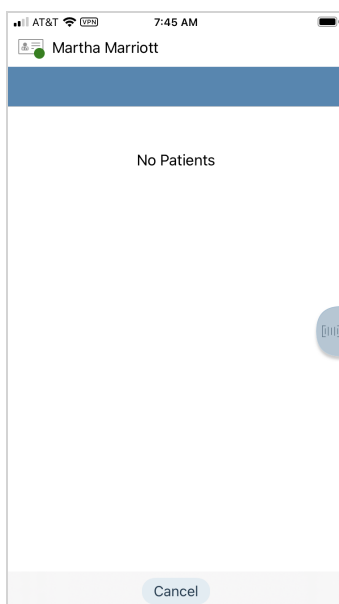
1. The hidden nursing unit 3RDFLOOR displays.

2. Touch 3RDFLOOR.

3. The patients however, do not display.

Indirect Care Role Assignments

When a caregiver with an indirect care role assignment (care role assigned to a location or organization unit) tries to assign to a hidden nursing unit, the unit will not display.



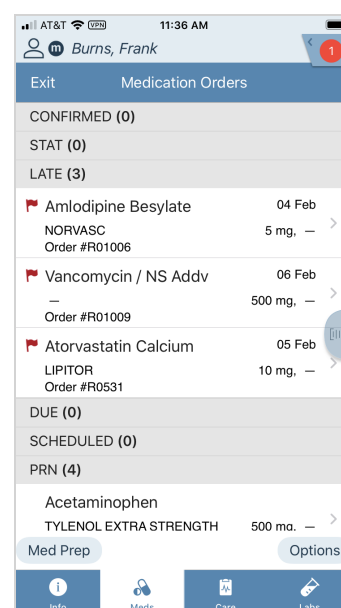
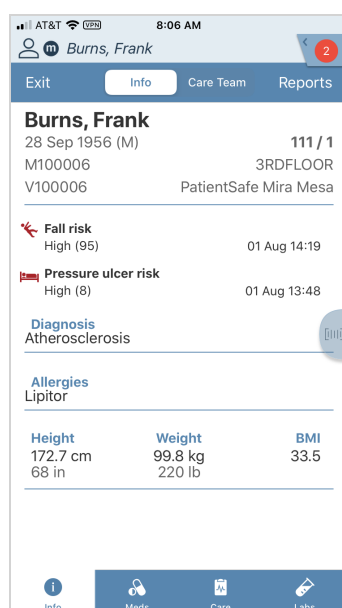
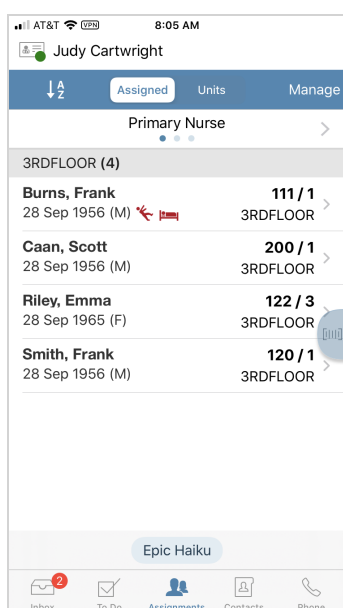


1. The hidden nursing unit 3RDFLOOR does not display. However, when 3RDFLOOR becomes visible again, it will display for assignment.

Patient Information

Viewing Patient Information

PatientTouch provides access to patient information. From the Assignments tab, touch the name of your assigned patient and the Patient Info screen displays. Depending on your installed modules, you will see the Meds, Care, and Labs tabs. Touch each tab to begin a workflow.



The **Assignments** tab displays all patients assigned to the logged in user.*

Note: *Hidden nursing units affect the display of patients. Refer to the Hidden Nursing Units topic below.

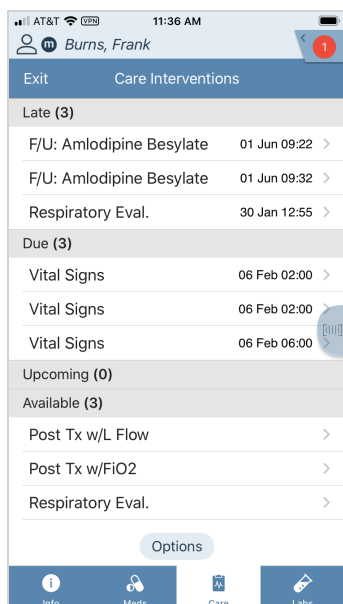
1. Touch a patient name.

2. The Patient Info screen displays.

3. Touch the **Meds** tab.

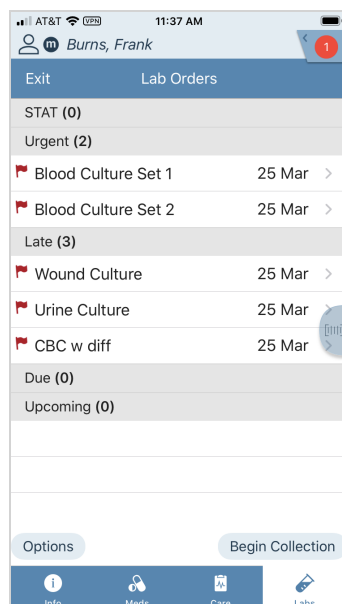
4. The **Meds** tab allows you to administer medications.

5. Touch the **Care** tab.



6. The **Care** tab allows you to document interventions for this patient.

7. Touch the **Labs** tab.

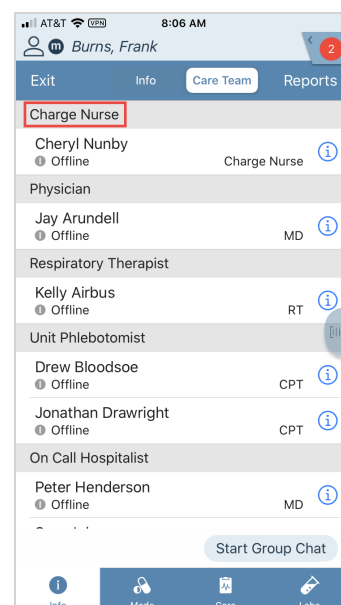
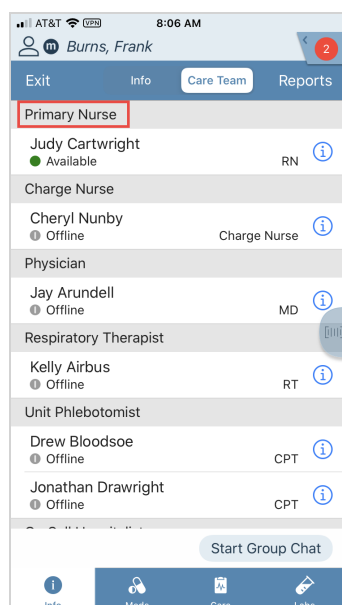
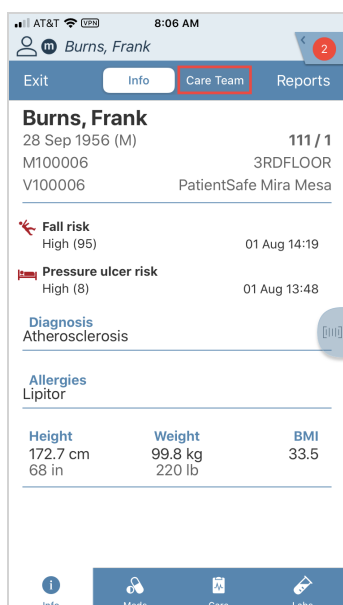


8. The **Labs** tab allows you to collect specimens.

Patient Care Team

The patient's care team members display when you touch the Care Team tab from the top of the screen. Caregivers can use the Info icon to select a method of communication. Touch **Start Group Chat** to communicate with all care team members.

When enabled, the Care Roles display in the care team list. When disabled, a care role will not display in the care team list. See below.





1. Touch **Care Team** from the Patient Info screen.

2. All care team members display. However, a Care Role may be configured to not display.

3. For example, the **Primary Nurse** care role displays in the image above.

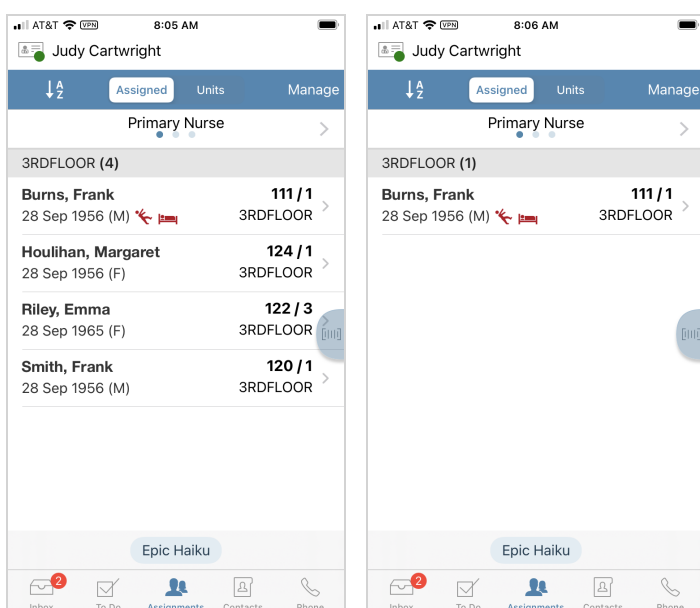
4. But when the Primary Nurse care role is configured in the Enterprise Manager to not display, caregivers will not see it in the Care Team list.

5. Instead, the next care role displays.

Hidden Nursing Units

Nursing units can be hidden from view in PatientTouch clients in the contact directory, patient browse, and assignments. Examples of units that are hidden include outpatient nursing units or temporary units that PatientTouch caregivers do not need visibility into.

If a nursing unit is hidden, caregivers will only be able to access patients in that unit to unassign. When that unit becomes active again, patients will become available to assign.



In the image above, the nursing unit is not hidden. It is visible with patients to assign and unassign.

In the image above, the nursing unit has been hidden and only patients who are available to unassign display.

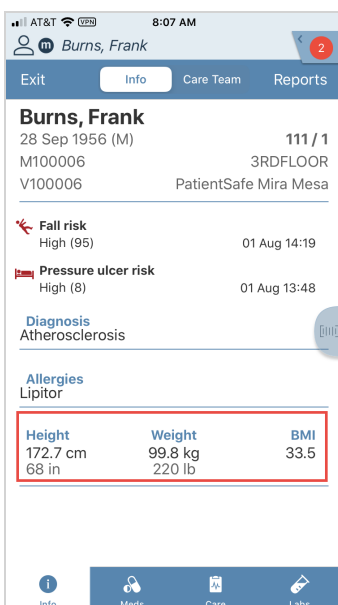
Display Preferences

Clinical Display Preferences is an Enterprise Manager setting that allows users to configure their system to align with their preference for BMI or BSA, as well as Metric and/or Imperial values, for height and weight data. The information will display for any user who has access/visibility to patient info in Enterprise Manager, Clinical Manager, Online MAR, printed reports, Web Messenger, Clinical app (iOS), and Communications app (Android and iOS).



In order for BSA to display, it must be sent via the interface.

The screen below shows BMI as well as metric and imperial units for the patient's height and weight.



Accessing Patient Results via mView

mView, which stands for mobile view, can be configured to display patient-specific clinical data to clinicians on the handheld. The power of *mView* is in bringing information to the user instead of the user having to go to various locations (computers, pieces of paper, another person, etc.). *mView* includes user-entered documentation including medication administrations, medication orders, vital sign collection, interventions, assessments, lab values, and so on.

Users access mView using the icon located on the top left corner of the Patient Info screen, as seen below.

The information displays in tab groups as seen in the following image (Resp, Vitals, Meds, Labs). Touch a Tab Group to see patient specific information.



Burns, Frank
 28 Sep 1956 (M) 111 / 1
 M100006 3RDFLOOR
 V100006 PatientSafe Mira Mesa

Fall risk
 High (95) 01 Aug 14:19

Pressure ulcer risk
 High (8) 01 Aug 13:48

Diagnosis
 Atherosclerosis

Allergies
 Lipitor

Height 172.7 cm 68 in
Weight 99.8 kg 220 lb
BMI 33.5

Info Meds Care Labs

mView Done

Burns, Frank
 28 Sep 1956 (M) 3RDFLOOR: 111/1

Labs VS **Meds** Test All Type? Is it Hot?

Meds

▶ Morphine Sulfate	20mg
26 Jul 08:32 (Judy Cartwright, RN)	
▶ Hepatitis A Vaccine	1140Unit
21 Feb 10:05 (Judy Cartwright, RN)	
▶ Atorvastatin Calcium	10mg
06 Feb 11:03 (Judy Cartwright, RN)	
▶ Acetaminophen-Codeine Phos	12mg
28 Mar 01:30 (Admin User)	
▶ Digoxin	0.125mg
13 Sep 14:30 (Judy Cartwright, RN)	
▶ Amlodipine Besylate	10mg
25 Jul 13:47 (Grace Hua, MD)	
▶ Oxycodone HCl	40mg
27 Jun 10:27 (Admin User)	
▶ Acetaminophen	500mg
11 May 13:11 (Judy Cartwright, RN)	
▶ Metoprolol-Hydrochlorothiazide	50mg
09 May 15:20 (Admin User)	
▶ Atorvastatin Calcium	20mg
09 May 15:05 (Judy Cartwright, RN)	

1. On the Patient Info screen, or anywhere within the patient context, touch the **mView** icon to view detailed clinical data.
2. The mView tabs display and are configured in the Clinical Manager.
3. The **Meds** tab displays the last documented medication for the patient.

Viewing mView Lab Results

mView also displays lab values from the laboratory information system. The font of the lab results display according to the results of the test: normal, abnormal, or critical. When there are abnormal results of a lab test, the font of the results displays in the following manner:

If the result is **abnormal high** or **abnormal low**, the result will display a black * beside the test name along with bold black font and a black up arrow for abnormal high results and a black down arrow for abnormal low results.



mView		Done
Burns, Frank		
28 Sep 1956 (M)		3RDFLOOR: 111/1
Labs	VS	Meds Test All Type? Is it Hot?
Vital Signs		
▼ Lab Results		
▶ LAB_Calcium *	10 Apr 10:05	
▶ LAB_Potassium *	28 Jul 08:56	
▼ LAB_Sodium *	28 Jul 08:52	
Sodium	↑ 152 mmol/L <i>H</i>	
136-145		
▶ LAB_Chloride *	05 Jun 08:40	

Abnormal High

mView		Done
Burns, Frank		
28 Sep 1956 (M)		3RDFLOOR: 111/1
Labs	VS	Meds Test All Type? Is it Hot?
Vital Signs		
▼ Lab Results		
▶ LAB_Calcium *	10 Apr 10:05	
▼ LAB_Potassium *	28 Jul 08:56	
Potassium	↓ 3.0 mmol/L <i>L</i>	
3.4-5.0		
▶ LAB_Sodium *	28 Jul 08:52	
▶ LAB_Chloride *	05 Jun 08:40	

Abnormal Low

If result is **critical high** or **critical low**, the result will display a red * beside the test name along with bold red font.

mView		Done
Burns, Frank		
28 Sep 1956 (M)		3RDFLOOR: 111/1
Labs	VS	Meds Test All Type? Is it Hot?
Vital Signs		
▼ Lab Results		
▶ LAB_Calcium *	10 Apr 10:05	
▶ LAB_Potassium *	28 Jul 08:56	
▶ LAB_Sodium *	28 Jul 08:52	
▼ LAB_Chloride *	05 Jun 08:40	
Chloride	140 mmol/L * <i>HH</i>	
98-108		

Critical High

mView		Done
Burns, Frank		
28 Sep 1956 (M)		3RDFLOOR: 111/1
Labs	VS	Meds Test All Type? Is it Hot?
Vital Signs		
▼ Lab Results		
▼ LAB_Calcium *	10 Apr 10:05	
Calcium	2.3 mg/dL * <i>LL</i>	
7.4-10.0		
▶ LAB_Potassium *	28 Jul 08:56	
▶ LAB_Sodium *	28 Jul 08:52	
▶ LAB_Chloride *	05 Jun 08:40	

Critical Low

When the tests are collapsed, the critical results display with a red asterisk and the abnormal results display with a black asterisk.



mView		Done
Burns, Frank		
28 Sep 1956 (M)		3RDFLOOR: 111/1
Labs	VS	Meds
Test All Types Is it Hot?		
Vital Signs		
▼ Lab Results		
▶ LAB_Calcium *	10 Apr 10:05	
▶ LAB_Potassium *	28 Jul 08:56	
▶ LAB_Sodium *	28 Jul 08:52	
▶ LAB_Chloride *	05 Jun 08:40	

mView Medication Orders Tab

The following mView features were originally targeted toward physicians. However, they may be useful to a variety of caregivers.

mView has expanded to help customers by providing a more wholistic view of a patient's condition and care plan. Medication Orders, both active, discontinued, and inactive are now included in mView. In addition, generic or non-medication orders display in a separate tab. Medication orders display whether or not the hospital has the Medication Administration module enabled or installed.

The images below are sample screens of the Medication Orders and Generic (Orders) tab.



The tabs are configured in the Clinical Manager.



Active Medication Orders

Verizon	1:59 PM	
mView	Done	
Bradford, Tom		
18 Sep 1942 (M)	2S-Ortho: 201/1	
Med Admins	Med Orders	Labs I/O Rounds
▼ Medication Orders — Active Orders		
▼ Scheduled		
ampicillin-sulbactam 1.5 g, IVPB, Q6H >		
Unasyn		
fentaNYL 1 Patch, TOP, Q3Day >		
fentaNYL 100 mcg/hr trans...		
insulin lispro 2-12 Units, SUBQ, AC >		
Humalog		
temazepam 30 mg, PO, HS >		
Restoril		
▼ PRN		
No medications qualify to display in this section.		
► Continuous		
► Medication Orders — DC'd Orders		

Inactive Medication Orders

Verizon	1:59 PM	
mView	Done	
Bradford, Tom		
18 Sep 1942 (M)	2S-Ortho: 201/1	
Med Admins	Med Orders	Labs I/O Rounds
► Medication Orders — Active Orders		
▼ Medication Orders — Inactive Orders		
cefuroxime sodium in 0.4% NS ✓		
750 mg, IVPB, Q4H		
Start: 09/25/2018 0900, Stop: 10/02/2018 09:53		
Ordered By: Dolittle, John, DO		
Test Comment Section. Display elyipsis if comment extends beyond 3 rows of content like this....		
dextrose 5% - NaCl 1,000 mL, IV >		
0.9% KCl 20 mEq		
Stopped: 10/02/2018 11:42		
docusate sodium 100 mg, PO, Daily >		
Stopped: 10/02/2018 15:26		
enoxaparin 40 mg, SUBQ, BID >		
Stopped: 10/02/2018 08:32		



Generic Orders (Non-Medication Orders)

mView		Done
Myers, Hazel		
17 Jun 2016 (U)		PICU: 712/1
Med Admins	Orders	Lab Results I/O Rounds
<p>▸ Consults</p> <p>▸ Dietary</p> <p>▾ LabOrder</p> <p>▸ Amylase Level Ordered Start: 7/17/19 09:12 PM ASAP , Once</p> <p>▸ CBC Dispatched Start: 7/18/19 11:34 AM STAT , Once</p> <p>▾ HCG Urine Qualitative Ordered Routine Start: 7/17/19 09:12 PM Notes: Specimen Type: Urine, Collection Priority: Routine Today collect</p> <p>▸ Lipase Level Ordered Start: 7/17/19 09:12 PM ASAP , Once</p> <p>▸ Radiology</p>		

SMS Patient Contact

Background

SMS Patient Contact allows caregivers utilizing PatientTouch to send SMS text messages to patient contacts, such as family members or friends. For example, a patient may be getting ready for discharge from the hospital, and they need a family/friend to come pick them up. Or a patient may be in surgery and a caregiver wants to communicate the patient status to a family member or friend. SMS Patient Contact increases patient family/friend satisfaction as it provides updates of patient status without requiring them to be in the hospital.

Example use cases for sending SMS text messages include the following:

- Discharge Coordination
- Patient Status Updates
- Virtual Waiting Room Coordination

Configuration

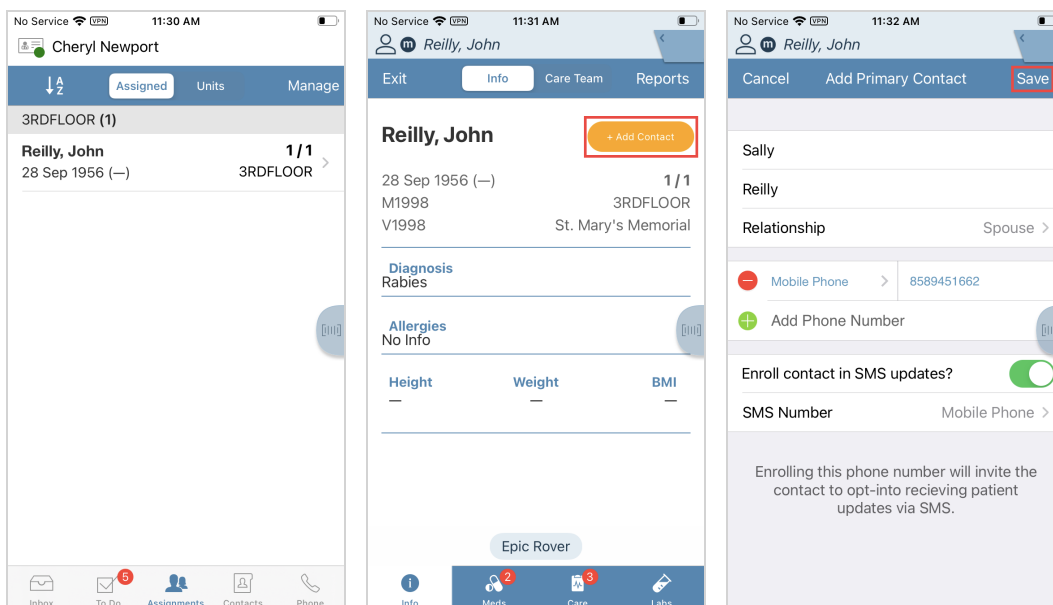
- Twilio is required for sending/monitoring/receiving SMS pages
- SMS Patient Contact messages are configured in the Enterprise Manager>Settings>SMS Patient Contact
- Caregivers need to have the **Edit Patient Contact Information** permission to add and edit patient contact information on the contact details screen
- Caregivers need to have the **Enable SMS Patient Contact** permission to send SMS messages to patient contacts

User Experience

In the scenario below, nurse Cheryl Newport is going to add a contact for the patient John Reilly, who is getting ready to be discharged from the hospital. Then, she will send the contact an SMS message asking her to pick up the patient from the hospital at 1:00 pm. The scenario below shows both the sender (Nurse Cheryl Newport) and receiver (patient contact Sally Reilly).



Sender - Nurse Cheryl Newport



1. From the **Assignments** tab, touch the patient's name (James Mattis).

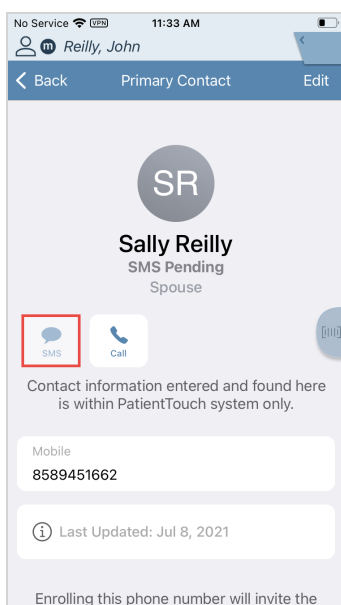
2. Touch **Add Contact**.

3. Complete the fields as shown in the image above.

4. Touch **Save**.



If Add Contact does not display, check to see that you have the Edit Patient Contact Information permission.



5. The patient contact screen shows **"SMS Pending"** and the **SMS** icon remains inactive until Sally responds to the Welcome



message.



Receiver - Sally Reilly

1. Sally receives a Welcome message asking if she wants to opt-in to receiving SMS updates.

2. Touch **Yes, I Opt-in**. Sally can opt-out at any time using the provided link.

3. Touch **Submit**.

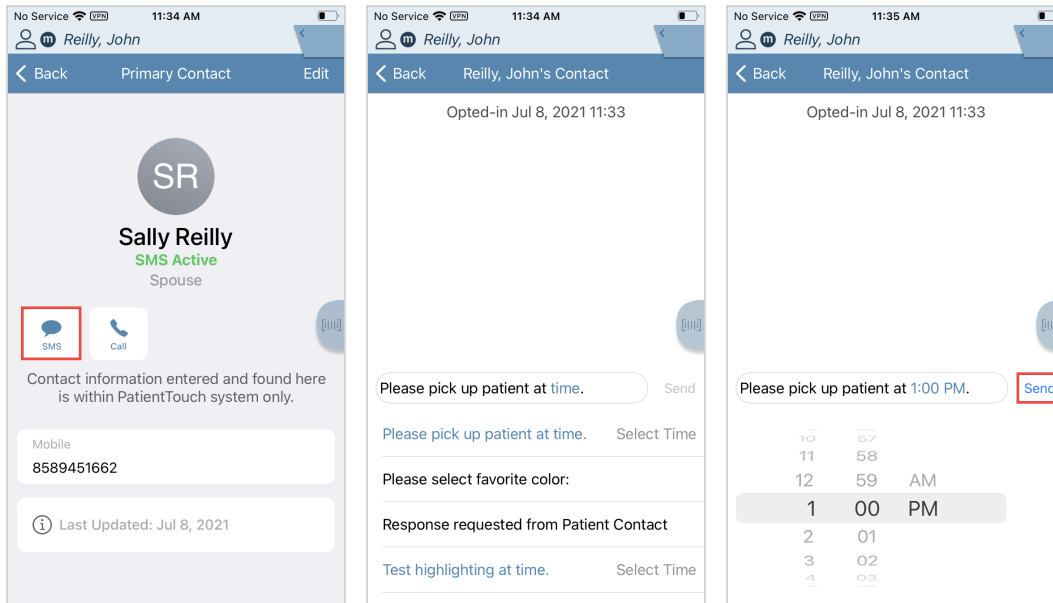
4. The screen confirms Sally's choice to opt-in.



At any time, a patient contact can return to the Welcome message and opt-out of receiving SMS messages, or opt back in.



Sender - Nurse Cheryl Newport



1. Once Sally opts-in, the SMS icon status changes to **Active**. Touch the **SMS** icon.

2. Select from a list of predefined text messages. In this scenario, select Please pick up patient at \$TIME.*

3. Select the time using the picker.

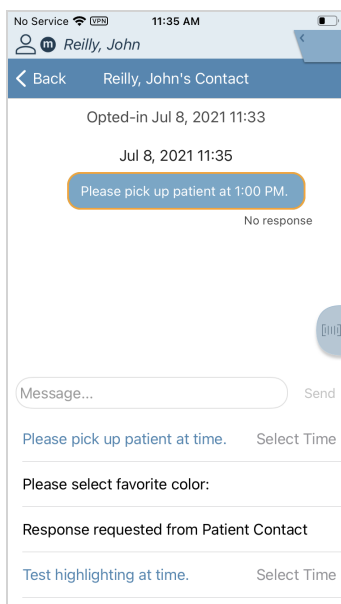
4. Touch **Send**.

*Some messages may include the following designated words that you will replace in the content of your message:

\$FACILITY: Caregivers can enter the facility the patient is in

\$TIME: Caregivers will have the ability to choose the time when they send the message

\$NUMBER: Caregivers will have the ability to enter a call back phone number when they send the message



5. The message displays with an indicator of **No Response**.

Receiver - Sally Reilly



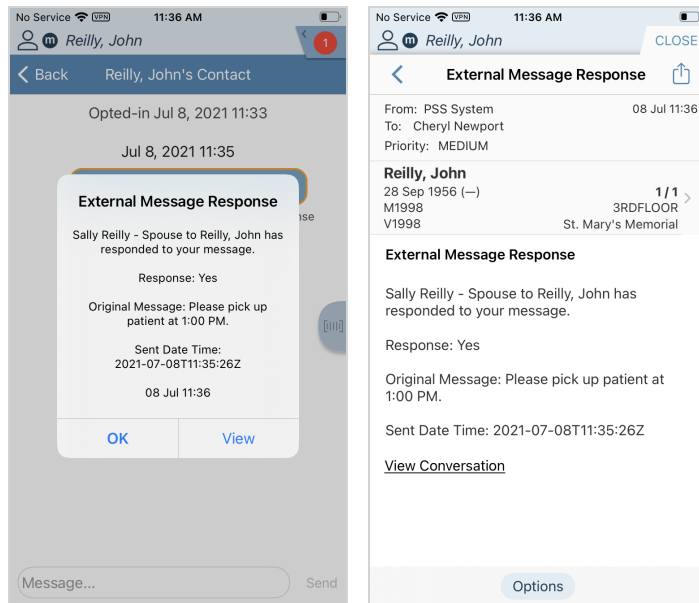
1. Sally receives the message and wants to pick up the patient at 1:00 pm. Touch **Yes**.

2. Touch **Submit**.

3. The screen confirms Sally's **Yes** response.



Sender - Nurse Cheryl Newport



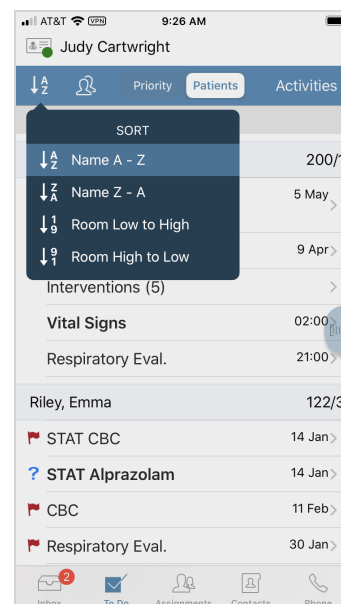
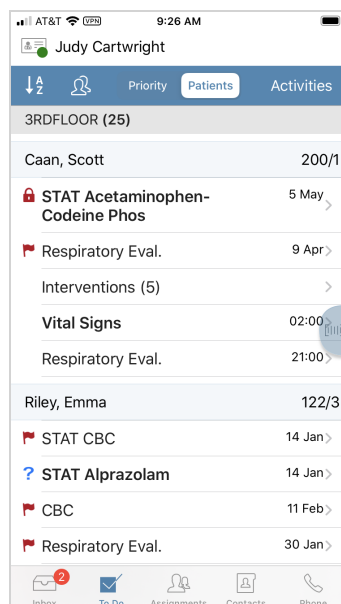
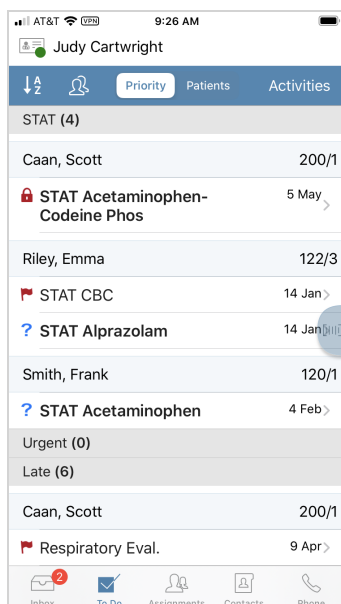
1. A notification displays in Cheryl Newport's Inbox that indicates Sally has responded. Touch **View**.
2. The message indicates she responded positively to picking up the patient at the designated time.
3. Touch **View Conversation** to access the conversation.

To Do List

Managing Your To Do List

The To Do List consists of tasks related to the patient(s) for whom you are assigned as the caregiver. You will be able to view those tasks assigned directly to you as well as tasks of others who may also be providing care to the same patient(s).

The tasks are categorized in the following ways: STAT, Late, Due, Upcoming, and Verification (if applicable). Tasks may include medication doses, specimen collections, care interventions/assessments, follow-ups, and /or orders that need to be verified. You can sort and view tasks by priority or patient.



1. Your **To Do Badge Count** provides the number of your outstanding tasks for your assigned patient(s)/location(s).

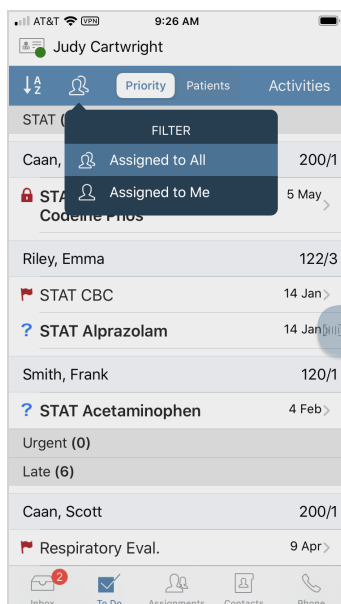
2. View the list by **Priority**.

3. Task assignment is indicated with typeface:

- Your assigned tasks are **bold**.
- Tasks in gray *italic* are assigned to another user in the same unit.
- Tasks in plain type are not assigned to any user.

4. View the list by **Patients**. The patients are listed according to their assigned nursing unit.

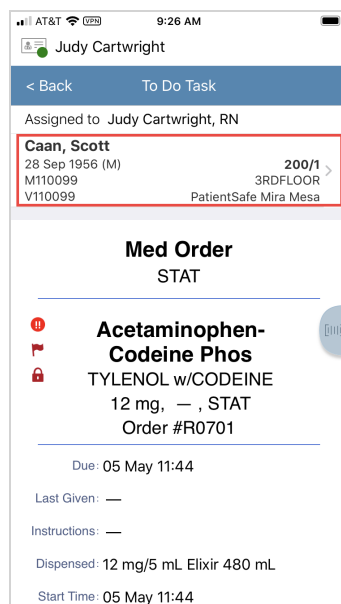
5. **Sort** to display tasks in order from patient Name A-Z, Z-A or Room (Low to High) or (High to Low).



6. Filter for tasks **Assigned to All** users.

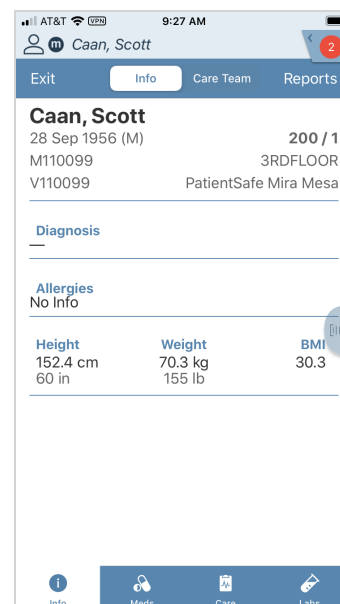
7. Filter for tasks **Assigned to Me**.

8. Touch on a specific task to see the **To Do Task** details.



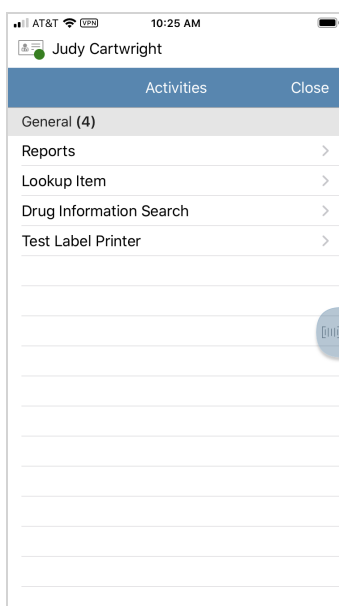
9. The To Do Task details displays information about the medication and dosage.

10. Touch the patient tag to directly access the **Patient Detail** screen.



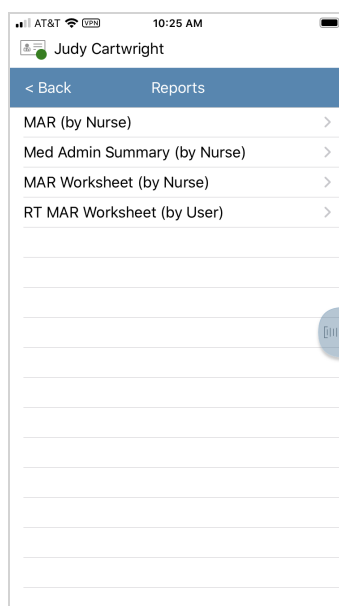
11. **Patient Details** allows you to document a medication, intervention, or lab workflow.

12. The **Care Team** tab provides a list of all caregivers assigned to this patient.

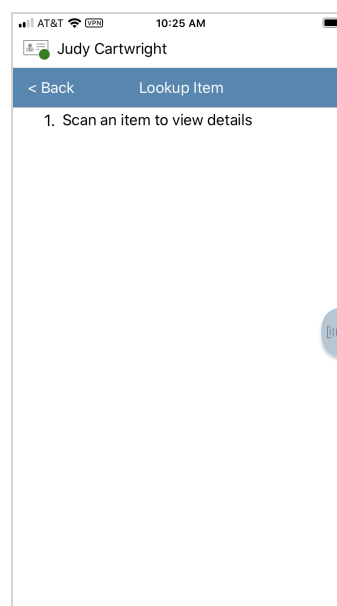


13. **Activities** provides **Reports**, **Lookup Item**, and **Drug Info Search**.

14. If you have the necessary



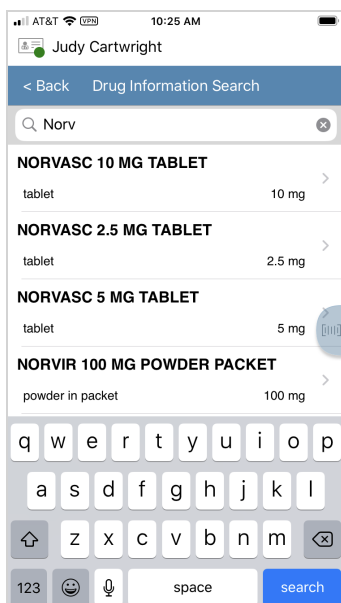
15. **Reports** displays a list of commonly used reports. Touch the small right facing arrow to edit information.



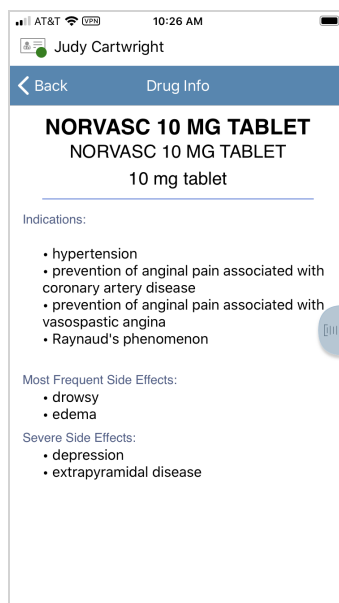
16. **Lookup Item** allows you to scan a medication's barcode to see information about that medication.



privileges, you may see **Test Label Printer** as well.



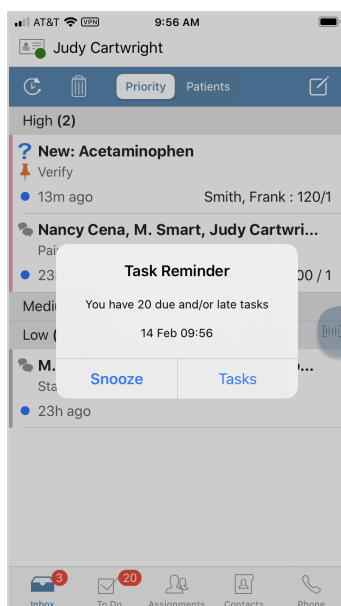
17. **Drug Info Search** displays a list of drugs containing your search information.



18. Select the desired drug from the list and indications and side effects display.

Task Reminders, To Do's, Notifications, and Badge Count

Task Reminders



Reminders are messages you receive when you have tasks that are due, almost late, late, or have a follow-up due. These reminders are driven by the defined lead and lag times and follow-up intervals as well as tied to the snooze interval setting in the Clinical Manager>Configuration>Settings>Global Settings tab.

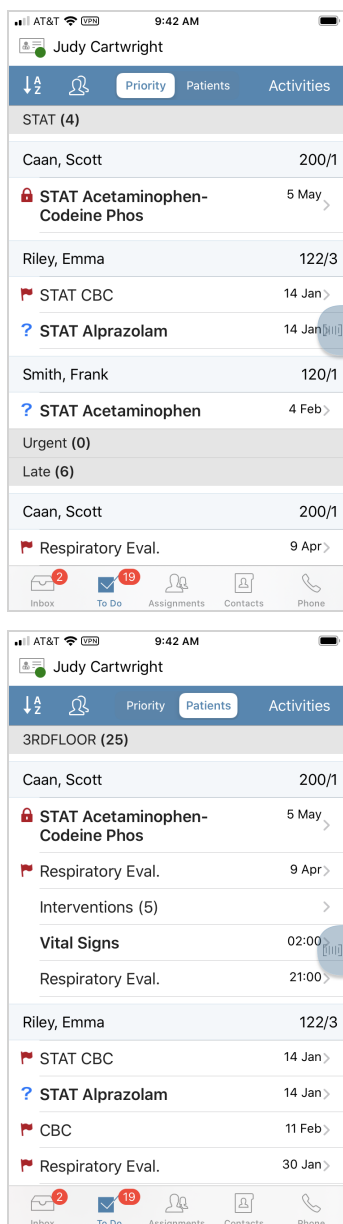
The hospital can customize the behavior of Reminders in the Clinical Manager, which may include a popup window, audible alert, and vibration of the iPhone device.

Reminders are suppressed while the user is in the Clinical Workflow (green screen workflow).

When the user is presented with a Reminder pop-up, there are two options: **Snooze** and **Tasks**. If the user does not want to immediately review the To Do tasks, they can select **Snooze**. The Reminder pop-up will display again after the defined snooze time has passed. To immediately review the details of the To Do tasks from the Reminder pop-up, touch **Tasks**. This will take you to the To Do list.



To Do Task List



The **To Do Tasks** screen allows caregivers to view all tasks scheduled for their assigned patients that they are able to perform, based on their user role privileges. For example, nurses might see all scheduled medication orders and care intervention tasks when scheduled for their patients.

The To Do Badge Count increases with each scheduled task and should match the Reminder pop-up count, however, this is not always the case. For example, a nurse may also be reminded of late RT medications.

The To Do Tasks list is also driven by the Upcoming Task Lead Time (Clinical Manager>Configuration>Settings>Global Settings tab). For example, if it's set to 12 hours, the To Do List will show any tasks that are "upcoming" within the next 12 hours.

Caregivers can view their tasks sorted by priority or by patient name.

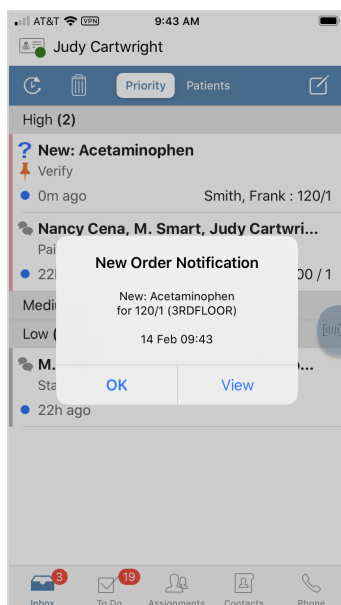
The **Priority** view displays tasks in the following order: Stat, Urgent, Late, Due, and Upcoming. Bold tasks are tasks assigned to the logged in user. Tasks in italics are assigned to another caregiver.

The **Patients** view shows tasks for each patient assigned to the caregiver. The patients are grouped based on the nursing unit in which they are located.

Both the **Priority** and **Patients** view can be sorted in the following ways: Name A-Z, Name Z-A, Room Low to High, Room High to Low.



Notifications



Notifications are direct messages to the user. These messages may be communication from another caregiver (text messages) order-specific (order notifications).

The way(s) in which notification messages are presented to the user will depend on the configuration settings determined by the facility. The user may receive a pop-up window, sound, and/or vibration.

Text message notification behavior is defined in the Enterprise Manager>Settings>Notification Behavior.

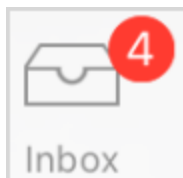
Order notification behavior is defined in the Clinical Manager>Configuration>Settings>Notification Settings.

The types of order notifications you receive are defined in the Clinical Manager>Configuration>Nursing Units>Settings tab.

Unlike task reminders, order notifications are one-time events that occur at the time of the event.

Order notifications can consist of the following: New/Updated Stat Orders, New/Updated Routine Orders, Discontinued Stat Orders, and Discontinued Routine Orders.

Badge Count



The Inbox badge count increases with each order notification, unread text message, and/or external alert (if integrated). Conversely, as each notification is addressed, the badge count decreases.

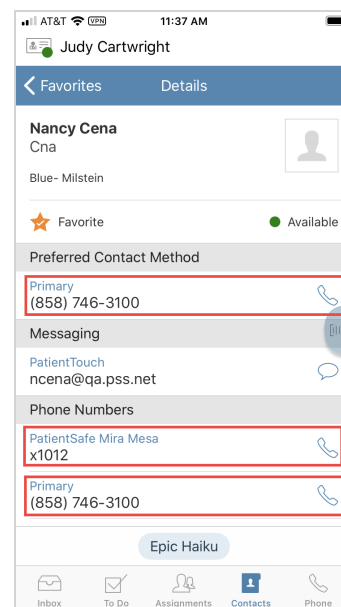
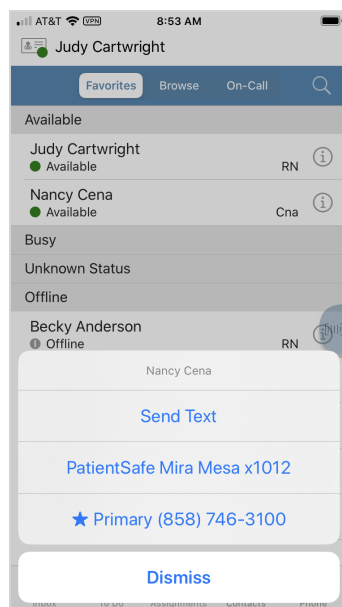
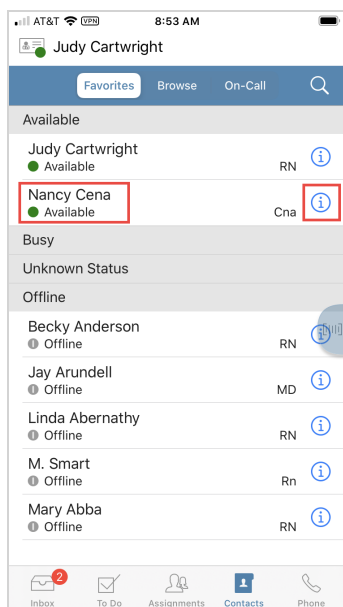
External alerts (if integrated): PatientTouch can integrate into your external alerting system to receive, route, and consolidate various alerts into the user's Inbox. Examples of external alerts are nurse call, telemetry, and patient monitors.

Phone

Placing a Call

In order to place a call, you must have the Clinical Communications module installed.

Follow the instructions below to place a call using the methods provided.



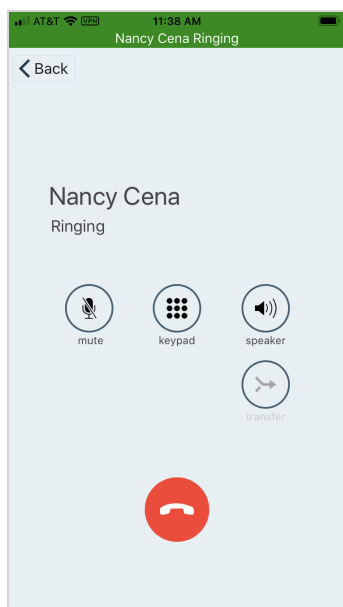
1. Access the **Contacts** tab to see who is available or busy.

2. Touch a **contact name** to display the action sheet.

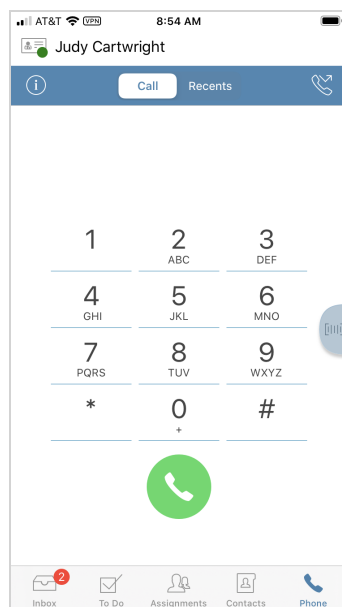
3. Touch any of the listed extensions or phone numbers to place a call.

4. Touch the **Info** (i) icon to display contact details.

5. Touch anywhere in the highlighted area to place a call.

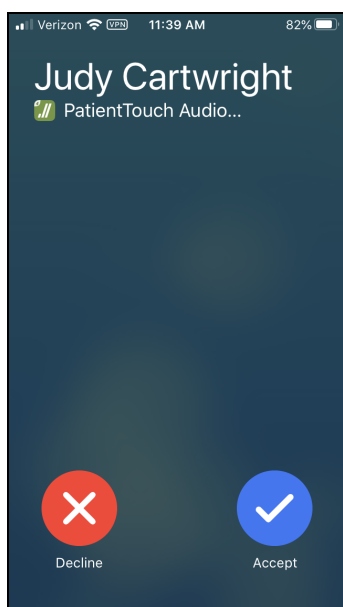


6. Once a call is placed, wait for the contact to pick up.



7. Or, you can dial the phone number manually on the **Phone** tab.

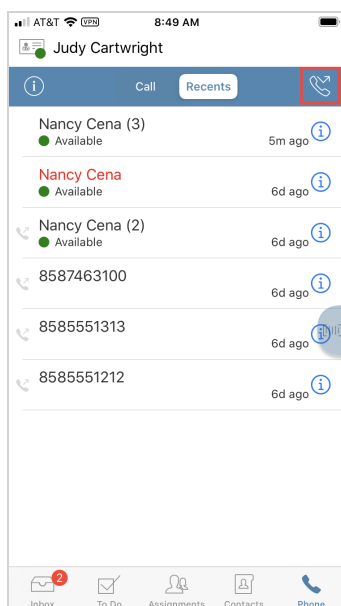
Receiving a Call



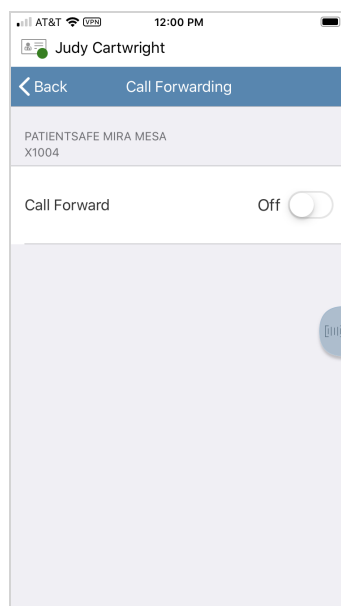
1. To receive a call, touch **Accept** or **Decline**.

Call Forward

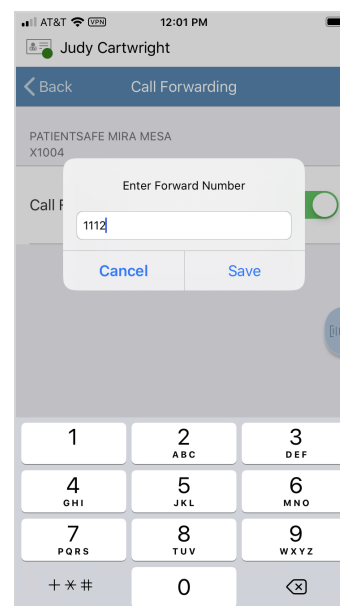
Use Call Forward to route missed calls to a designated phone number or extension.



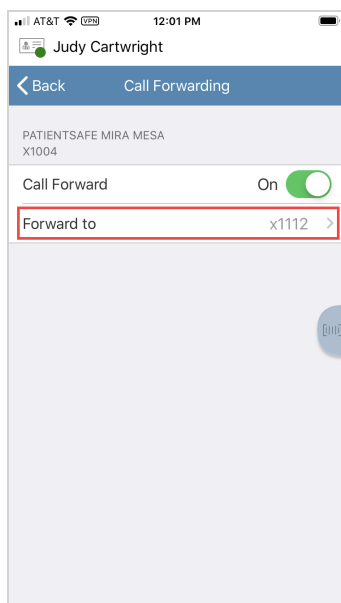
1. In Recents, view your placed, received, and missed calls.
2. Touch the **Call Forward** icon to enable Call Forwarding.



3. Turn **Call Forward** to "On."



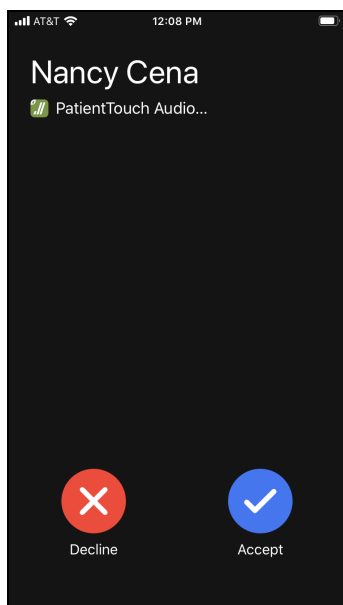
4. Enter the forward number or extension to route missed calls to this number.
5. Touch **Save**.



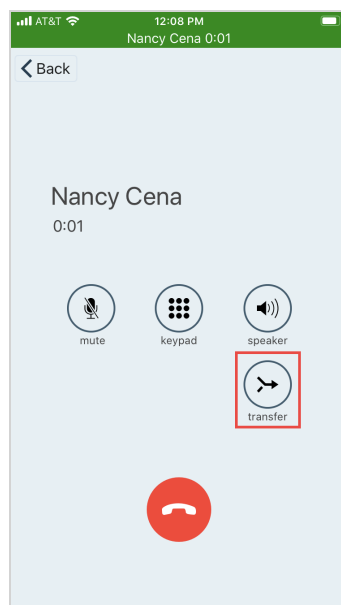
6. The forward number displays on screen.

Call Transfer

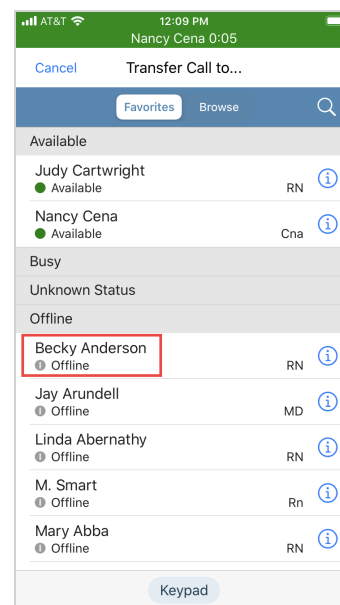
Call Transfer allows you to transfer calls to another caregiver with Blind or Assisted transfer options.



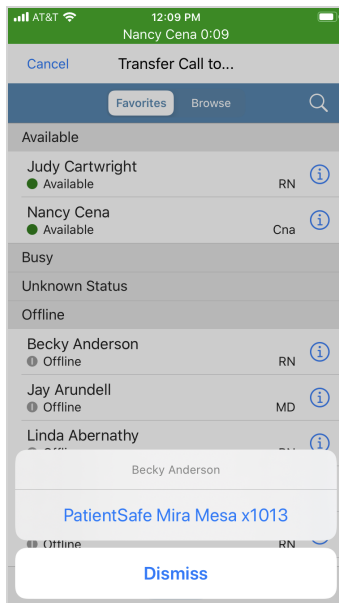
1. When you have an incoming call, touch **Accept**.



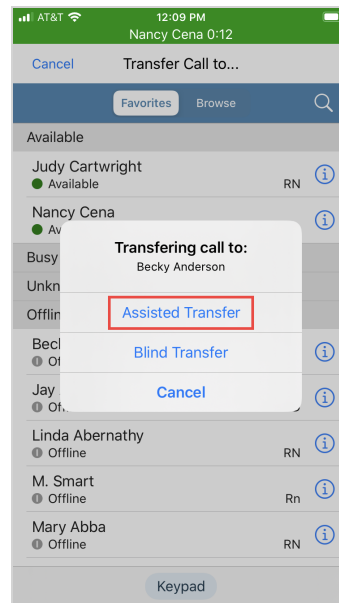
2. Touch **Transfer**.



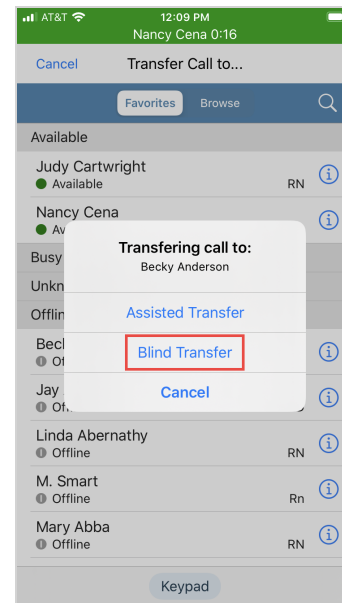
3. Touch the **caregiver's name** to whom you want to transfer the call.



4. Touch the **extension/phone number** from the action sheet.



5. Touch **Assisted Transfer** to place the original call on hold to allow for an introduction to the transferred call.

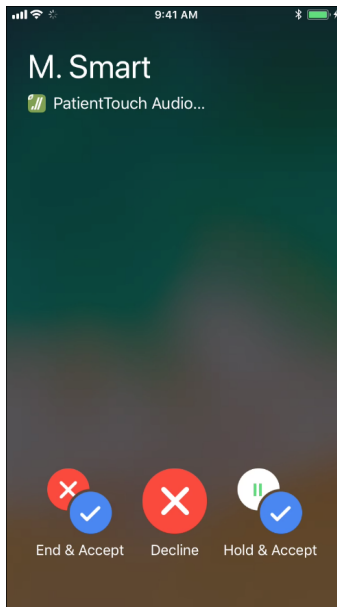


6. Touch **Blind Transfer** to send the call immediately to the other caregiver.

Call Waiting

Users can receive an incoming call when already on a call. The incoming call can be received at any time that there is less than two callers connected.

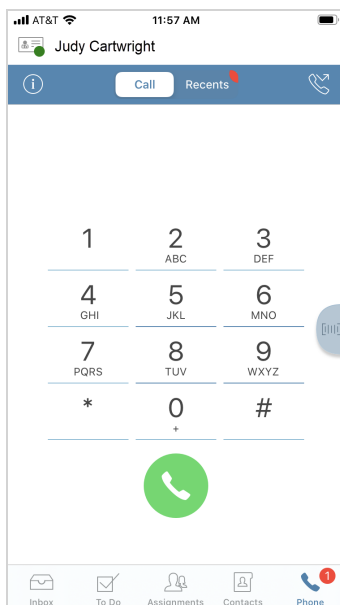
Users will see the screen shot below when on a call and another call comes in.



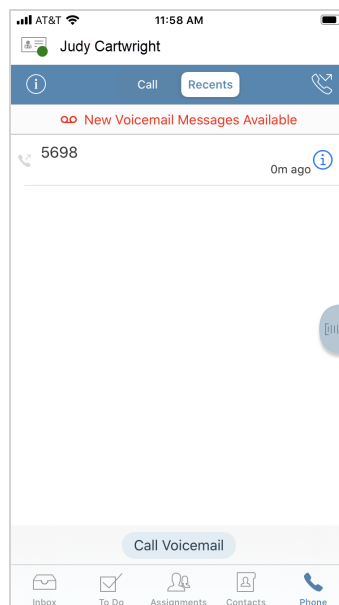
Voice Mail Indicator

Users with voicemail will receive a banner in the Phone tab and their badge count will increase according to the number of new voice mail messages.

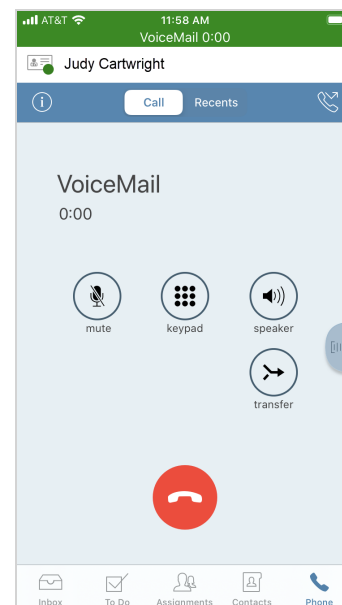
VoiceMail Banner



1. When you have missed calls or voicemail messages, the Badge Count increases on the **Phone** tab.



3. Touch the red banner on the top of the screen or touch **Call Voicemail** to access your voice mail box.



4. When calling voicemail, you will hear a message asking for identification information prior to accessing your messages.



2. Touch **Recents**.

Note: Once you touch the voicemail banner, it is removed until you receive another voicemail message.

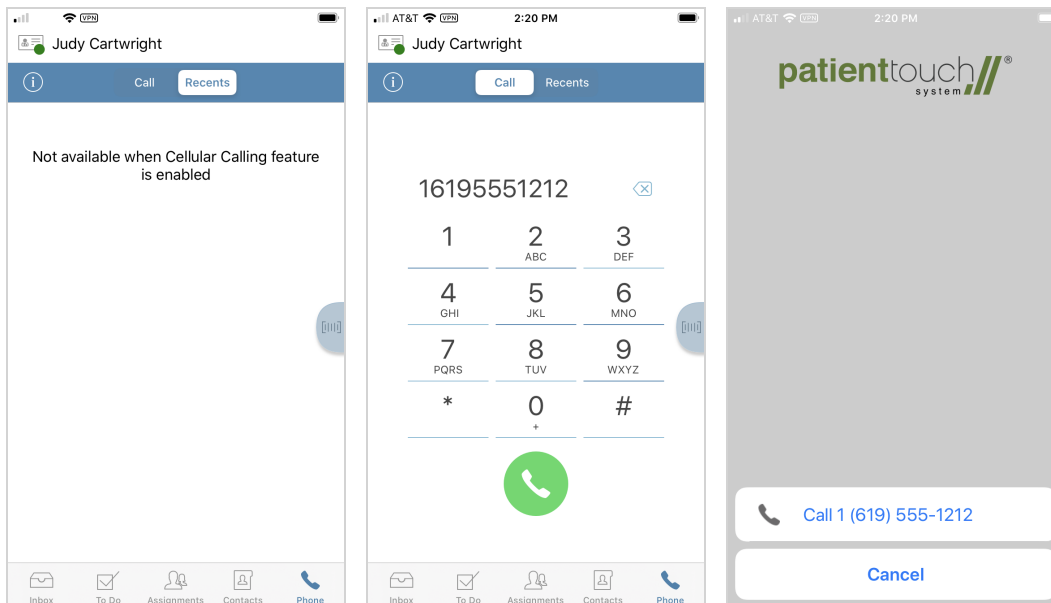
5. Touch the **Keypad** on your device to enter data and retrieve your messages.

Cellular Calling

Placing & Receiving a Call

If you belong to a facility where users want to make and receive phone calls using their native cell phone carrier, contact your hospital's IT department to configure your phone settings. Cellular Calling must also be enabled in Enterprise Manager. When Cellular Calling is enabled, all VoIP service features (Call Forwarding, Recents) will be disabled. Users can only dial 10 digit DID phone numbers when on a cellular calling plan. For example, if you want to dial another caregiver's extension, dial the entire 10 digit number (the "1" is optional). If you want to dial 4 digit extensions, see Extension Dialing below. Please follow the instructions below to learn how to place and receive a call using cellular.

Sender



1. Recents is disabled when cellular calling is enabled.

2. Dial the 10 digit DID phone number and touch the **Call** icon.

3. Touch the phone number on the action sheet to place the call.

Receiver

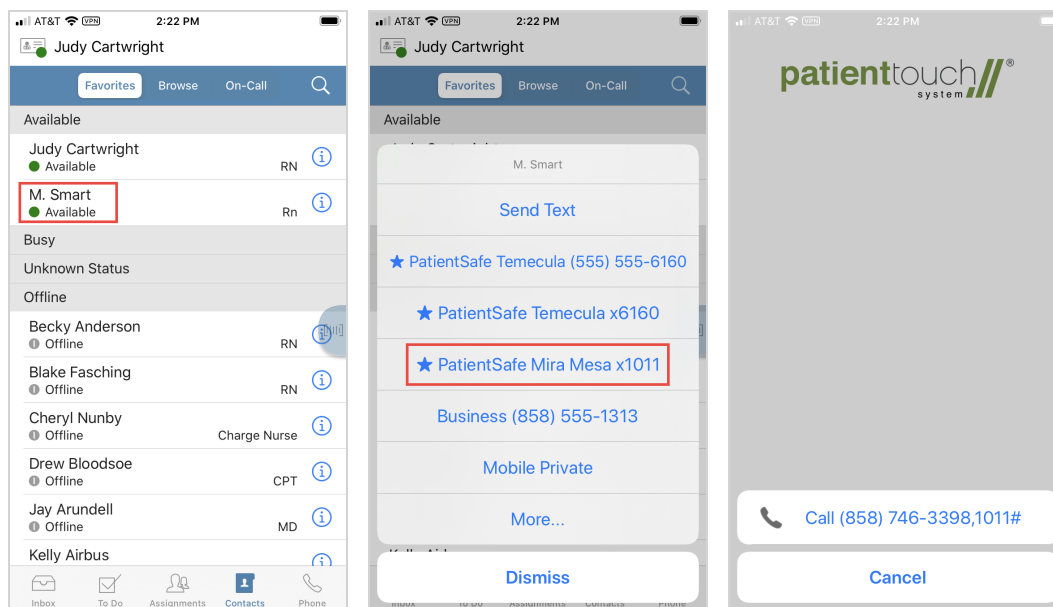
When you receive a call, touch **Accept** or **Decline** to respond.



Extension Dialing

Extension Dialing must be configured in Enterprise Manager. Contact your hospital's IT department for configuration. Prefer Cellular Calling must also be enabled on your device. Once configuration is in place, users can dial 4 digit facility extensions.

When dialing 4 digit extensions using cellular calling, caregivers will receive a PatientTouch prefix plus the 4 digit extension when dialing. The prefix is configured when setting up Extension Dialing and should be considered as part of the number {(858) 746-3398, 1011# in the example below}. Please follow the instructions below to dial 4 digit extensions.



1. From **Contacts**, touch the caregiver's name.
2. Touch the 4 digit extension number (x1011).
3. Touch the phone number that displays to place your call.

Paging

Short Message Service (SMS) Paging

Please contact PatientSafe Solutions Technical Support or Interface Group regarding Twilio integration for SMS Paging and Custom Caller ID.

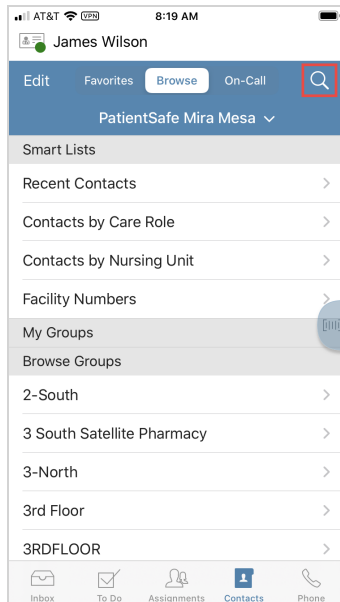
When configured, SMS Paging allows users of the PatientTouch System to send a page to non-users (who are in the same hospital enterprise network) in a way that does not violate HIPAA protocols.

For example, Dr. Wilson (Head of Oncology and user of PatientTouch System) may want to consult with Dr. Carter (Orthopedic Surgeon and non-user) for a specific patient.

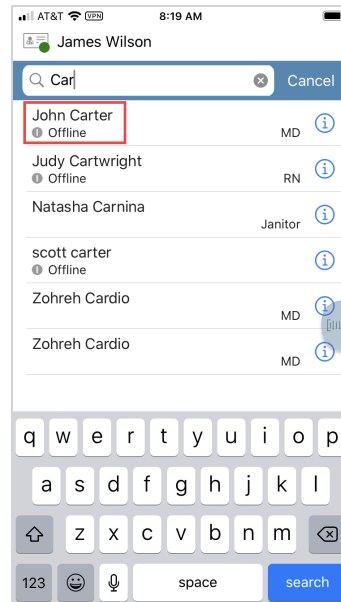


Users must have the appropriate privileges to use this feature.

Sender - Dr. Wilson (User of the PatientTouch System)

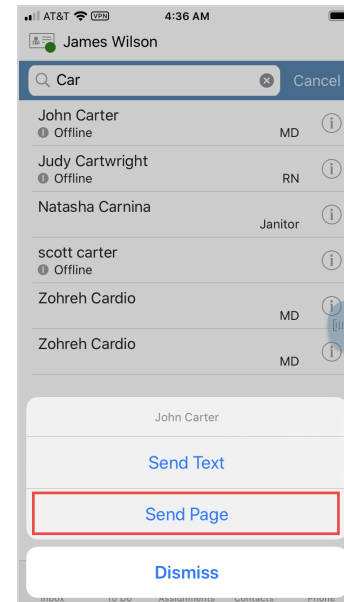


1. From **Contacts>Browse**, touch **Search**.



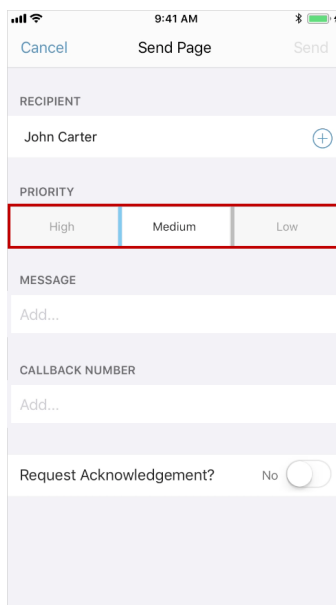
2. Enter the first few characters of the recipient's first or last name in the search field.

3. Touch the contact name.

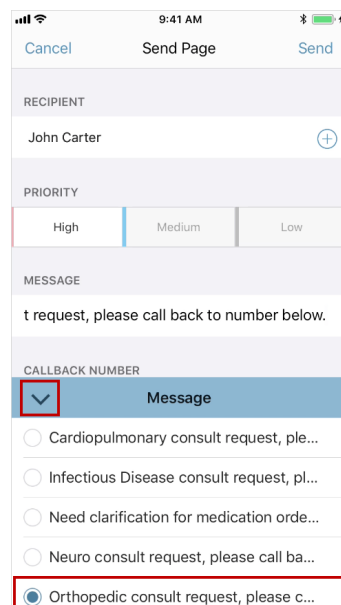


4. An overlay displays with the contact options.

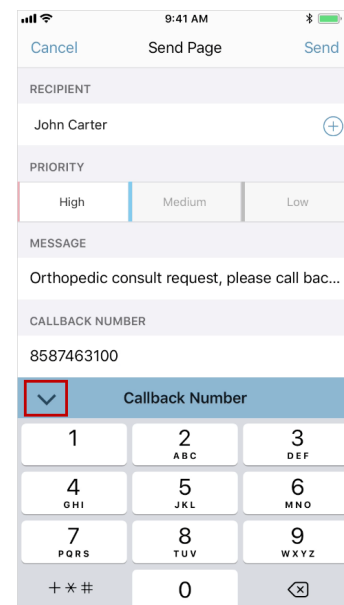
5. Touch **Send Page**.



6. Select the **Priority**: High, Medium, Low.



7. Select a quick text message from the list.



9. Enter a callback phone number.



8. Touch the **Chevron** icon to dismiss the Message field.

10. Touch the **Chevron** icon to dismiss the Callback Number field.

9:41 AM

Cancel Send Page **Send**

RECIPIENT

John Carter (+)

PRIORITY

High Medium Low

MESSAGE

Orthopedic consult request, please call bac...

CALLBACK NUMBER

8587463100

Request Acknowledgement? Yes ☒

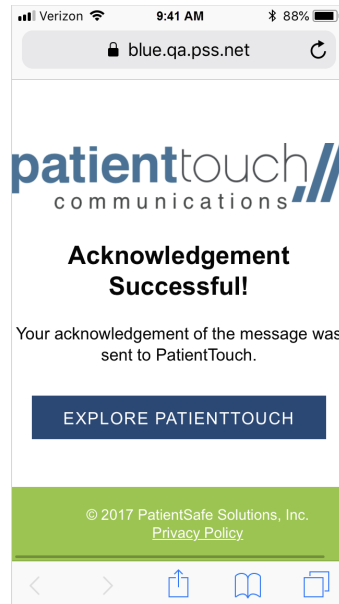
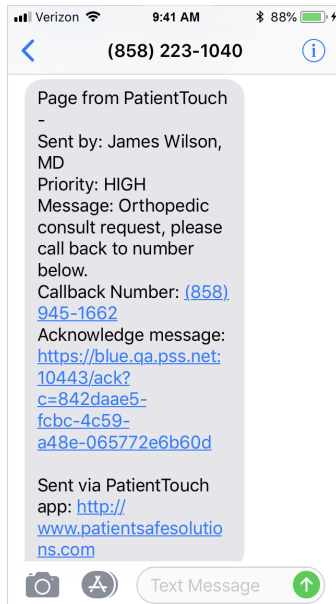
NOTIFY ME IF NOT ACKNOWLEDGED WITHIN

none **5m** 15m 30m 60m

11. If you want the recipient to acknowledge the message, toggle to **Yes** and select the timeframe for which to receive notification.

12. Touch **Send**.

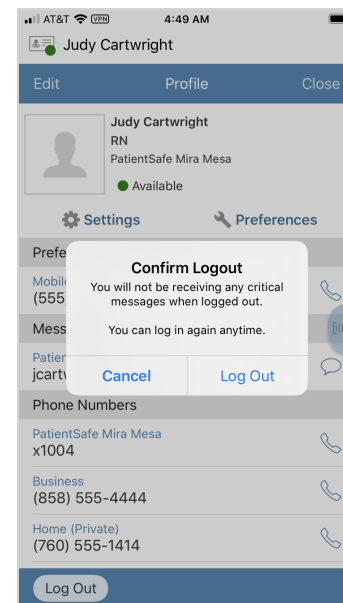
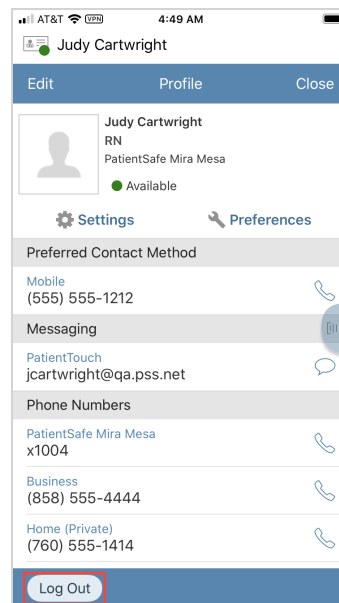
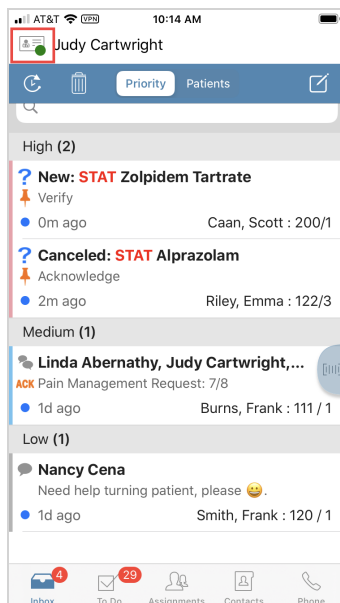
Receiver - Dr. Carter (Non-User of the PatientTouch System)



1. The page message displays on the recipient's mobile phone.
2. Touch the link under **Acknowledge message**.
3. When the recipient acknowledges the page, he/she receives the **Acknowledgement Successful** message.

Logging Out

Please use the instructions below to learn how to log out of the application, when it's time to end your shift or change devices.





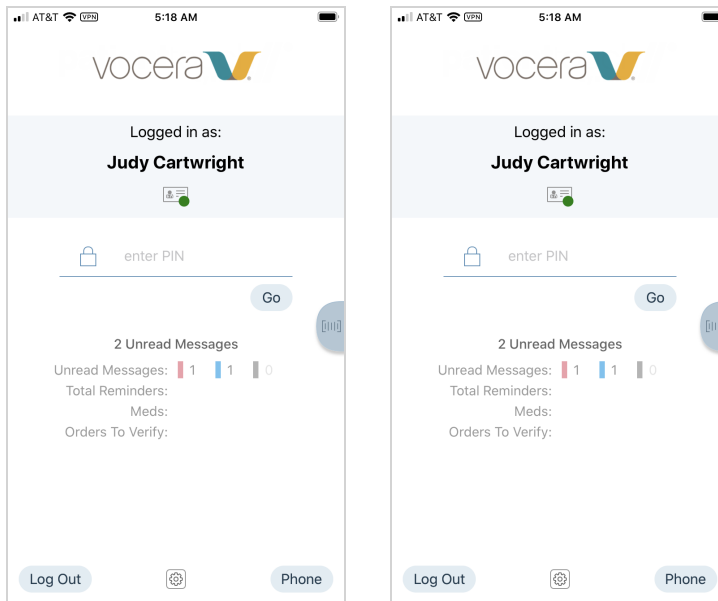
1. Touch the **Profile** tab.

2. Touch **Log Out**.

3. Touch **Log Out** on the confirmation screen to exit the application.

Security Mode and Logging Out

After 10 minutes of inactivity (configurable in Enterprise Manager), the application goes into **Security Mode**. Please follow the instructions below to learn how to log out of Security Mode or reauthenticate.



1. Security Mode displays the number of unread messages, total reminders, meds to administer, and orders to verify for the logged in user.

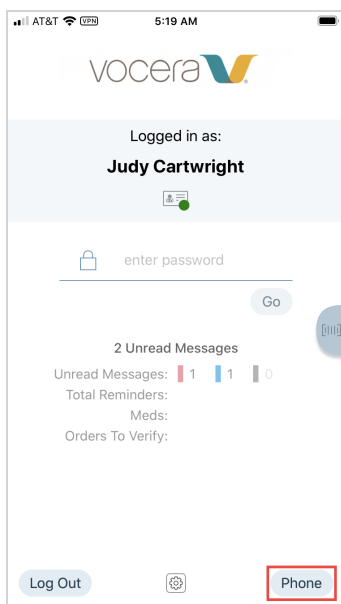
2. Touch **Log Out** to log out of the application.

3. Reauthenticate using one of the following methods:

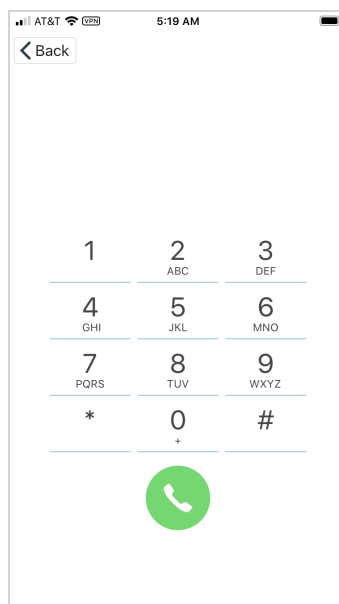
- Scan your badge to resume
- Enter your PIN/Password using the key pad (not shown here).

Place Urgent Call in Security Mode

Security Mode provides a **Phone** button, to place urgent calls. The Phone tab is only available to those who have the Clinical Communications module installed.



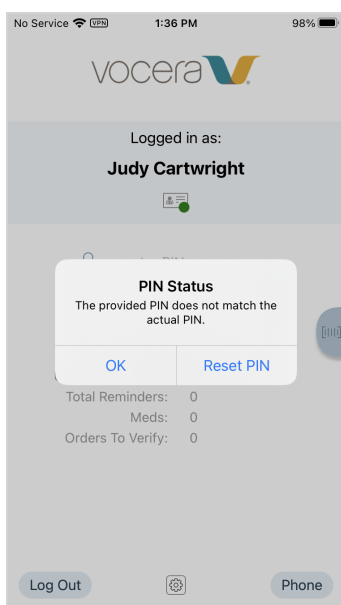
1. Touch the **Phone** button to place urgent calls.



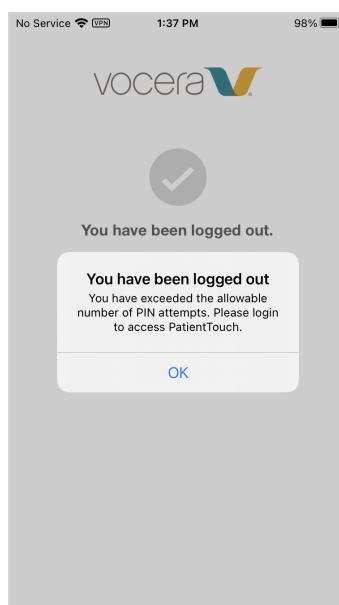
2. Enter the phone number or extension and touch the **Call** icon.

Max PIN Attempts

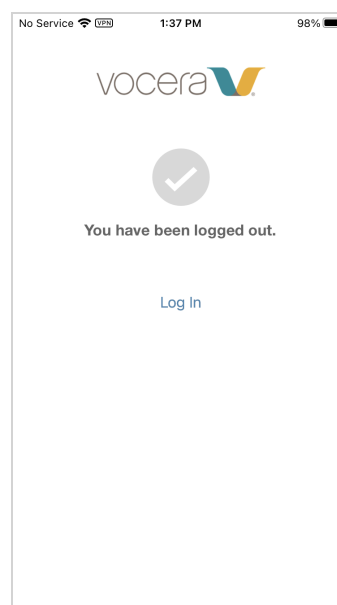
When caregivers attempt to enter their PIN, but have reached the maximum number of PIN attempts as configured in the Enterprise Manager, they will automatically get logged out of the system.



After entering an incorrect PIN, you will see the message as displayed here.



After reaching the maximum number of PIN attempts, you will be automatically logged



...and need to log in again.



out of the application...

Connectivity Error Handling

You may see error messages that display at the top of your screen indicating a lost connection. These error messages are color coded for your convenience:

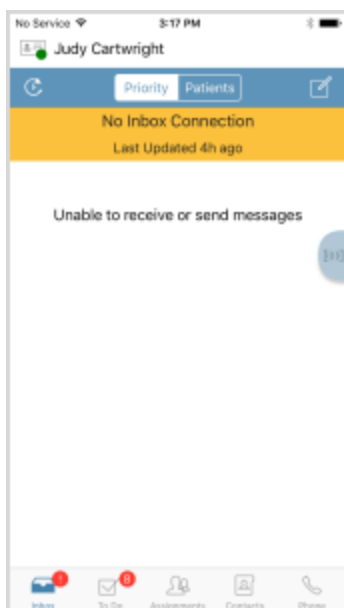
Red: indicates a major error

Yellow: indicates a transition or recovery process

Green: indicates a recovery success

List of possible connectivity error banners In order of priority	
No Network Connection	
No Connection to Multiple Services	×
No Phone Connection	×
No Inbox Connection	×
No Enterprise Server Connection	×
No Clinical Server Connection	×

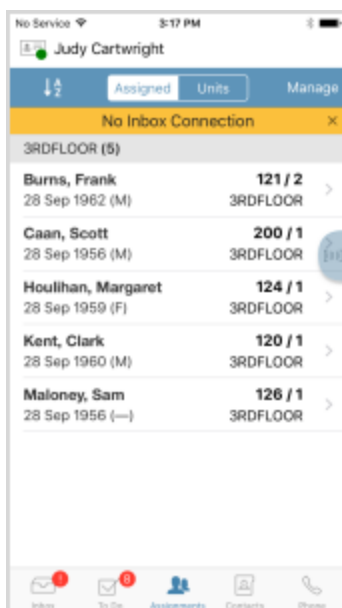
Sample Screen Images



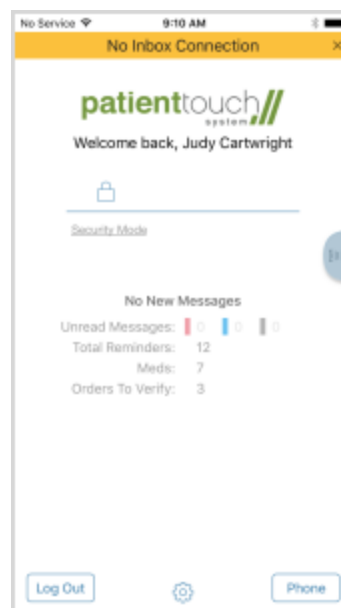
No Inbox Connection

Messages and notifications cannot be received or sent.

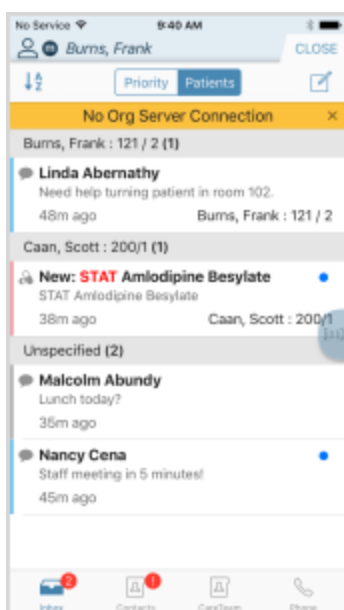
Contact the administrator if issue persists.



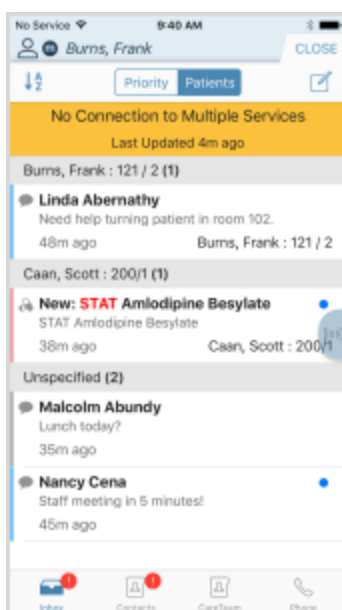
You may see the message **No Inbox Connection** on various PatientTouch application screens.



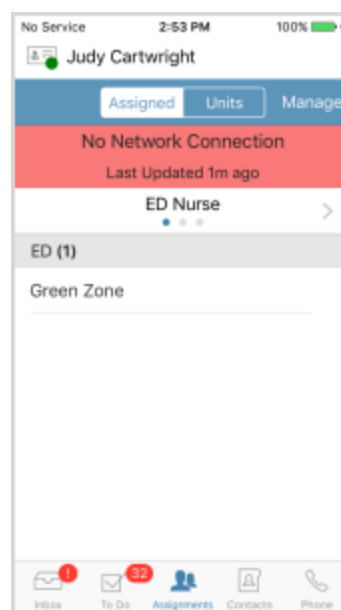
If you see this message before scanning your badge to login, contact your administrator.



No Org Server Connection



No Connection to Multiple



No Network Connection



Unable to get contacts and assignment information.

Contact the administrator if issue persists.

Services

Messages and notifications cannot be received or sent.

Unable to get contacts and assignment information.

Contact the administrator if issue persists.

You receive this message when the Wi-Fi gets disconnected and you are in the PatientTouch application. Please make sure you are in an area with adequate reception and network connections are enabled.