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Administrator Guide v 2.5

Getting Started with Flo

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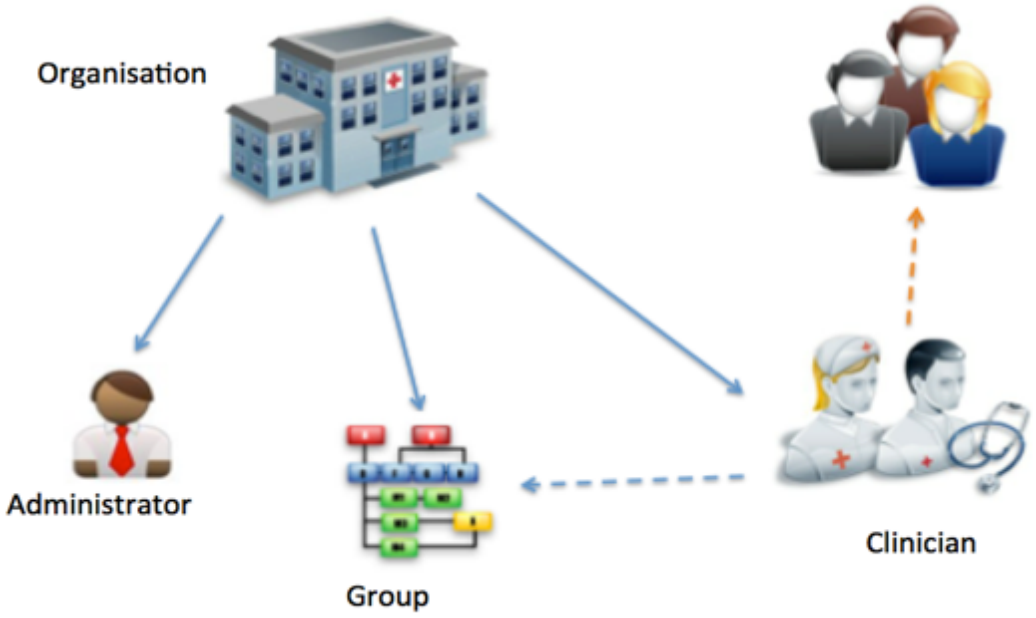
Overview



Access to Flo

For an organisation to access Flo, an organisation-wide license is commissioned which provides access for teams within the organisation. Each organisation that uses Flo typically has their own license for clarity around governance and accounting.

Groups and Clinicians

Once the teams, or practices using Flo are highlighted, "groups" need to be created within the system e.g. "Heart Failure Specialist Nurses" or "West Street Medical Centre". This segmentation into groups ensures that only information is that is relevant to members of that particular group is visible when accessing the system. Clinical users are then added to the system and assigned to the relevant group. Practically this means that members of each group can only add protocols that have been agreed for them to use with patients, and can only view the patient records of any patients connected with a clinician within that group.

Sharing Information

Flo has been designed to enable the sharing of information between teams both within and across organisational boundaries. This is achieved by the patient having one record within Flo, identified by their mobile phone number. This allows clinical users from any organisation to be able to share information recorded within Flo once they have connected with them by adding the as one of their patients; and achieved the required patient consent. Therefore clinicians may be able to view other protocols and associated readings within Flo that have been used by clinicians outside of their group organisation.

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Administrator Access and Clinician Access

There are two levels of access to Flo a) Administrator and b) Clinician, both are accessed via www.florence.uk.net as the login determines which access is provided. Each organisation requires at least one administrator to be able to carry out the functions described below. If a person needs to have both levels of access, two separate logins will be required; different email addresses will be needed however the same mobile phone number can be used to facilitate the password.

Administrators can:

- Create groups
- Create logins for clinical users, and assign to groups
- Create logins for additional admin users
- Copy, amend and create protocols, and assign to groups
- Access activity information via "My Stats"
- Set alert notifications for clinical users if required

Administrators cannot:

- View any patient data
- Add patients to Flo
- Reset password for clinical users

Clinician's can:

- Add patients to Flo
- View patients from within their group
- Assign protocols for patients
- View patient readings
- Personalise protocols for individual patients
- Send direct ad hoc text messages to patients via "send text message"
- Set their own alert notification preferences
- Reset their own password
- View the caseload of another clinician in their group.

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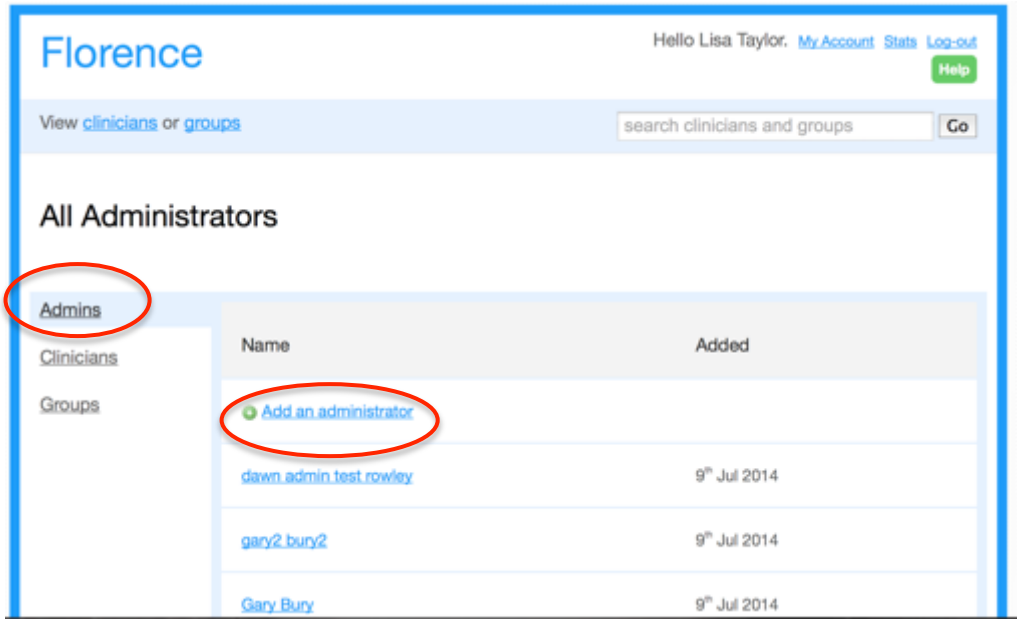
Creating Administrator Access

- Mediaburst will need to create your organisation's first administrator login, by emailing hello@mediaburst.co.uk and supplying the name, mobile phone number and unique email address
- Once one administrator login has been created, this administrator can then create additional administrator logins:
  - Login as an administrator
  - Select "Admins"
  - Select "Add an administrator"



Add the new administrator's details as promoted. When you click "create" Florence will send the new administrator an email with a link to reset their password and login to Florence

Guidance
a) Administrator access does not have access to patient details
b) Administrator access should be approved as per your local governance procedure
b) Training and capability assurance should be sought before granting administrator access to any individual

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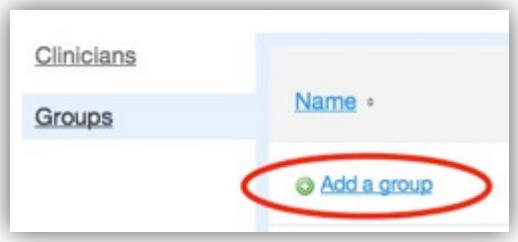
Creating "Groups"

Typically "groups" within Florence reflect the teams within which the organisation works; this could be a particular team, "Diabetes Specialist Nurses" or a particular GP Practice as examples. The creation of groups within Florence allows clinicians and protocols to be organised to reflect the requirements of that team and provides assurance that particular teams can access only protocols that have been agreed for their cohorts of patients.

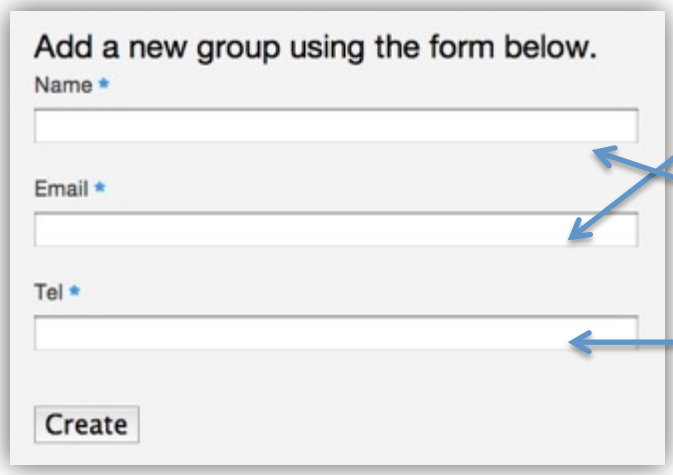
Once a group has been created, the clinicians belonging to that group are added (page x) along with agreed protocols (page x). Only the protocols assigned to a particular group can be selected for use by the clinicians within the group.

To create a group:

- After logging in as an administrator, select "groups"
- Then select "add a group"



- Then complete the form below as promoted, with the key details for the group as described below, and select "create" when complete



Shared mailbox target for "group email alerts"

Team name and telephone number. Flo will inform the patient of the team name and number when a connection is made to a patient who is already using Flo.

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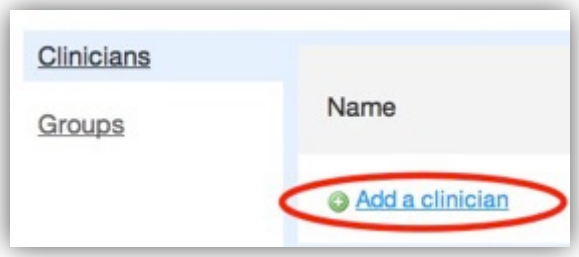
Generating and Amending Clinician Access

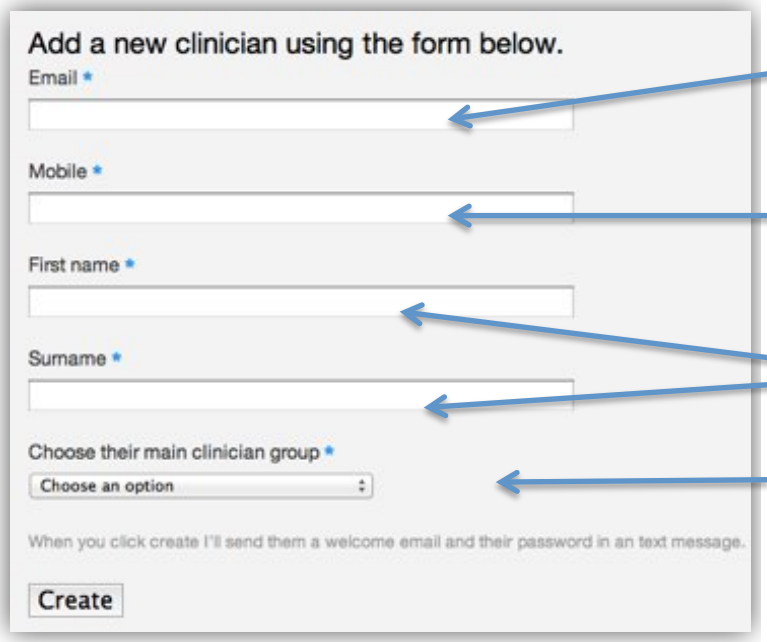
For security, individual logins are required for each person who needs to access Florence to add, view or amend patient details, protocols or readings, this is called the "clinician" access.

To create a clinician login

- Login as an administrator and select "add a clinician"



- Complete the form, as prompted below and click "create"



Login email address

Mobile number, never published used only for security

Clinician name

Main Group: creates a link between clinician and a primary billing/governance group.

- A welcome email will be sent to the new user at the email address they supplied, containing a link to Florence which will enable them to set their new password and login

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Deleting a Clinician

It is essential that when access to Florence is no longer required by individuals that any associated accounts are disabled. Note: there must be no patients being actively monitored belonging to the clinician as this will end the protocols being used by associated patients; therefore in this circumstance patients must either be transferred to another clinician as appropriate or discharged from Florence.
To delete a clinician:

- Login as an Administrator
- Find the clinician whose details need amending wither by scrolling down the page, or via the search box in the top right of the screen.
- Click on the clinician's name
- In the "overview" tab, scroll down and select "delete clinician" at the bottom right

If the clinician does have patients associated with them, after clicking "Delete" Flo will present you with a list of other clinicians within this team and prompt you to choose someone to transfer the patients to. We would advise that before transferring patients, you consult with the appropriate clinicians to determine who is most suitable to transfer the patients' care to. It's also important to note that when patients are transferred, the receiving clinician and the patient will be informed of this transfer.

Editing a Clinician's Details

If the name, email address or mobile phone number of a clinician has been changed this must be updated within Florence. It is best practice for the clinician to maintain their up to date details within Florence via "Accounts & Settings" when they are logged in; however this function can also be undertaken by an administrator. To do this:

- Login as an Administrator
- Find the clinician whose details need amending wither by scrolling down the page, or via the search box in the top right of the screen.
- Click on the clinician's name
- Click on the "overview" tab on the left hand side and amend the email address and "save"
- Then click on the "contact details" tab on the left hand side and amend the information as required; remembering to press "save"

Guidance
When generating access to Florence, the clinician's mobile phone is used in conjunction with their email address to enhance security of access. Both the email address and the mobile phone number are required when the user re-sets their password, and also if the user forgets their password to allow it to be reset. The mobile phone number is never published to patients.

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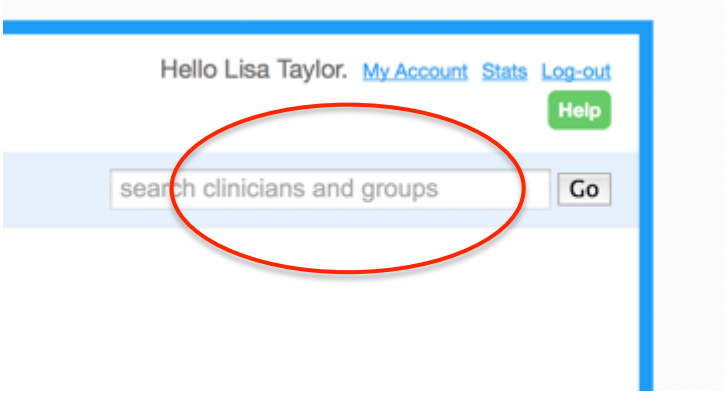
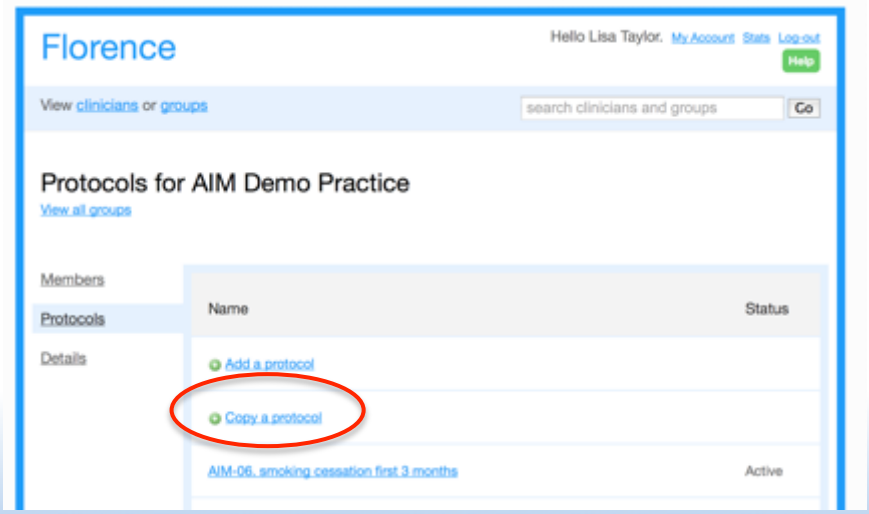
Copying Protocols from the "Central Library"

The central library within Florence provides examples of protocols for use with Florence that are available to download. The protocols are, where appropriate based on current best evidence at the time of completion. It is important to note that the use of these protocols should be compared to local clinically agreed protocols to ensure that they reflect local arrangements. Adjustments can be made to these protocols as per local guidelines if required. Once copied from the central library into the required group in Florence, the protocols can then be made available for clinicians to use with their patients.

- Select the group that you wish to copy the protocol into by either
  - Clicking on "groups" on the left hand side of the screen or typing part or all of the group name in the search box at the top



- Once in the group where you wish the protocol to be copied to, select "protocols" on the left and then "copy"



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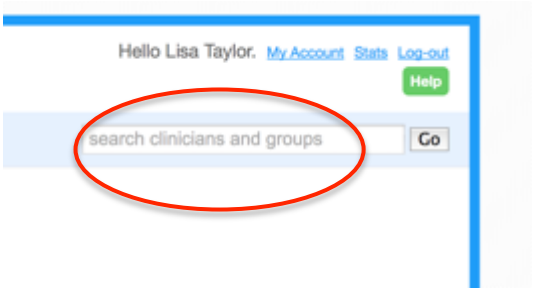
Making Protocols Available to Clinicians or Suspending Use

A protocol can exist within Florence in 3 stages:

Status	Visible to Clinicians?	Description
Active	Yes	A protocol needs to be made "active" by an Administrator if it has been copied or created. This will make it visible to clinicians when they are "adding a service"
Pending	No	The default status when adding or copying a protocol. The protocol will not be available for your Clinicians to use until you make it "active"
On hold	No	If a protocol has previously been "active" and access by Clinicians to use with patients needs to be suspended. By selecting "on hold" the protocols will be visible to the admin user within the group but not to clinicians until it is made "active" again

Changes to the status of a protocol can be made by:

- Find the group where the protocol exists by:
- Clicking on "groups" on the left hand side of the screen or typing part or all of the group name in the search box at the top



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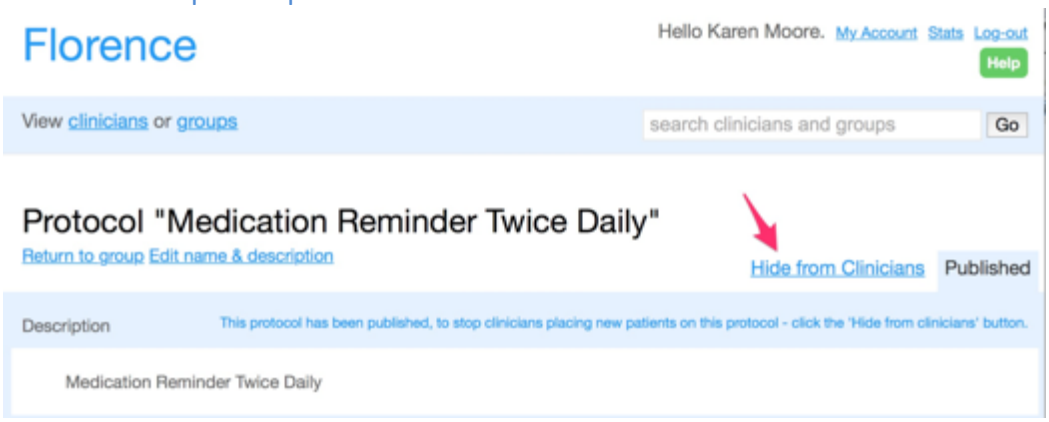
Making Protocols Available to Clinicians or Suspending Use

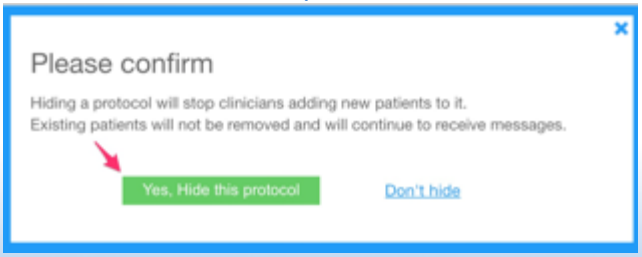
- Click on the group where the protocol is that you want to amend the status
- Select “protocols” on the left hand side
- Click on the protocol that you wish to amend the status of and Click “Publish”

- Click on “Yes, publish” to confirm

- To suspend a protocol from use Click on “Hide from Clinicians”



Click on “Yes, hide this protocol” to confirm



Guidance Foundation

Before a protocol is made available to Clinicians to use with patients it must be agreed as per your local governance procedures, which must include operational testing.

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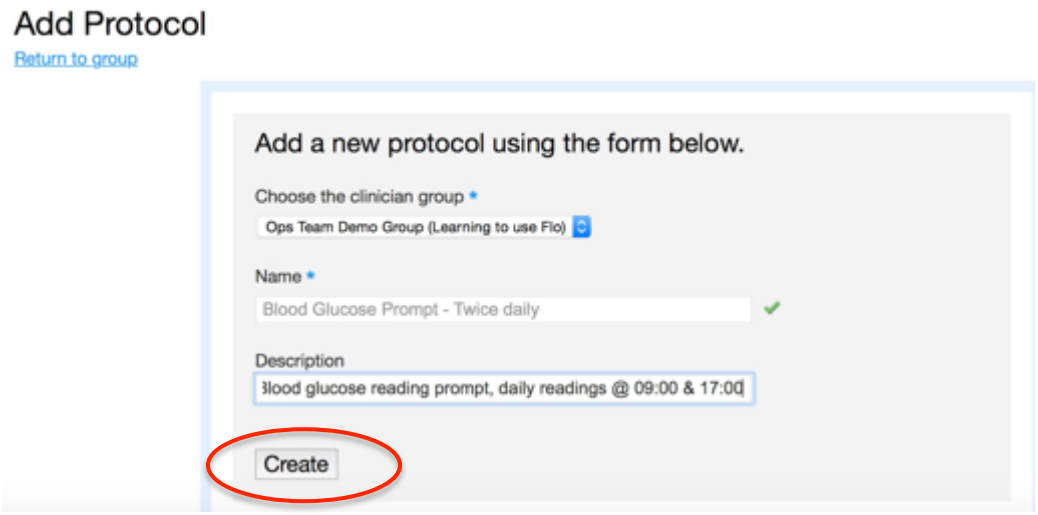
Creating a Protocol

- Login as an admin
- Select the group that they protocol will belong in
- Select “protocols” on the left hand side
- Click “add a protocol

- Name the protocol and add a narrative description that concisely describes its application and content
- Click “create”



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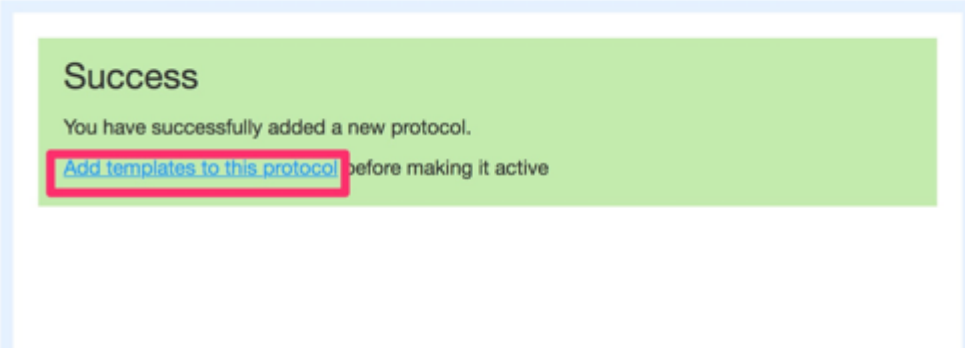
Creating a basic reminder template

Now you can add templates to make up the protocol

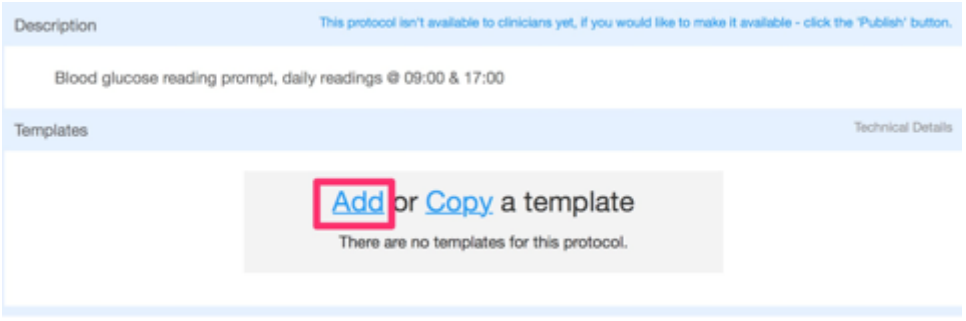
- In the green banner, you'll see the confirmation that the protocol has been added, now click "add templates to this protocol"



Templates can be:

- Added (created as new) or
- Copied (copied from an existing template within your organisation) See "Copying templates"

- To create a new template click "add"



- You will see an option of "reminder" or "reading" select "reminder"

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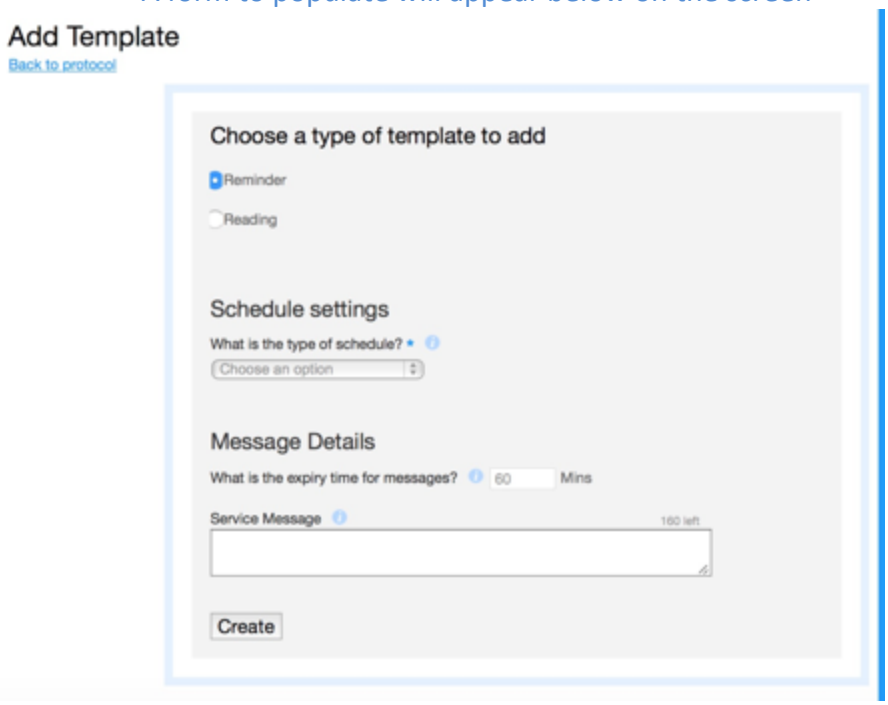
Creating a basic reminder template

- A form to populate will appear below on the screen



- The "schedule settings" option allows you to set the frequency of the message in this template here. Depending on the schedule setting chosen, the relevant fields will appear below:

- "Once only" – the message contained in this template will be sent only once according to the time of day and relative start time set
  E.g. if the relative start time is day 6, the message will be sent once on day 6. Day 0 is the current day, day 1 the day after and so on.

- "On certain days of the week" – days of the week options are available to select. The message contained in this template will be sent on the days of the week selected according to the time of day and relative start / end times set.
  E.g. if Tuesday and Wednesday are selected, Flo will send the message each Tuesday and Wednesday in between the relative start and end times

- "Every so many days" – the message will be sent on the relative start day then every x days in between the relative start and end time.

E.g. if “every 2 days” is selected, the message will be sent on the relative start day, then every 2 days until the relative end time is reached. The same principle applies for “every so many weeks” or “every so many months”

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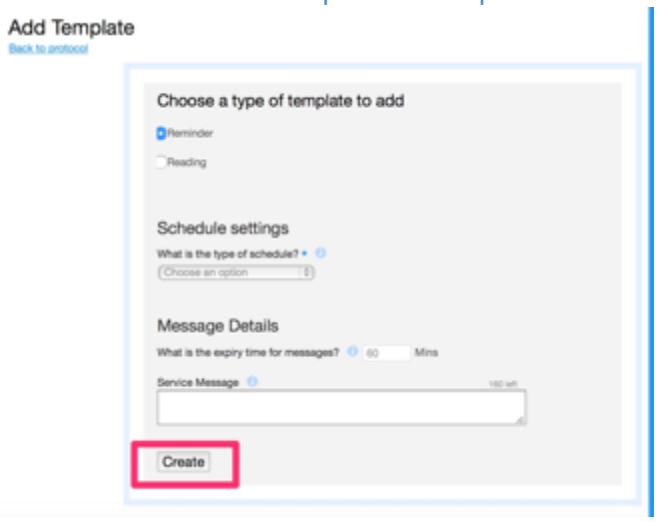
Creating a basic reminder template

- The “expiry time” for the message can be amended here if required (see guidance at end)
- Message details - you can now enter the text for the message that Flo will send according to schedule set.
- Once the template is complete – click “create”



- You now have the option to add further templates to build up the protocol, follow the same process for further templates according to the design of the protocol.

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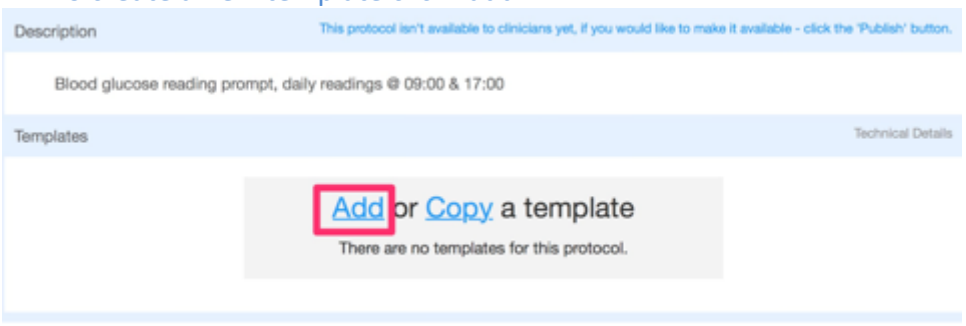
Creating a basic reading template

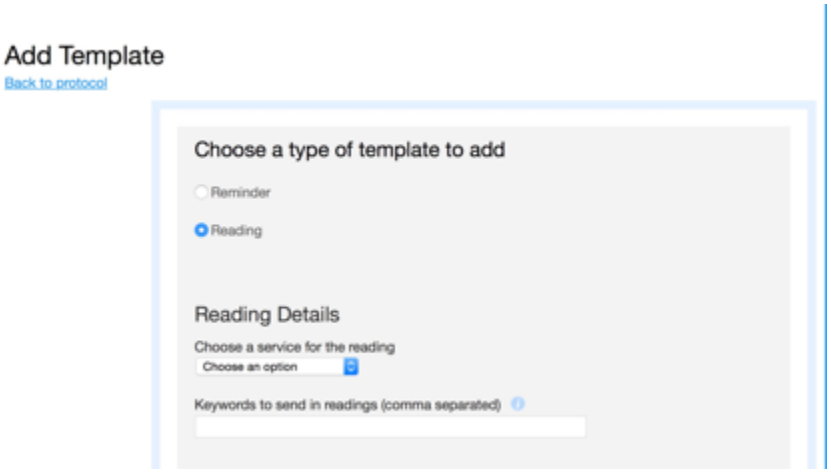
Templates can be:

- Added (created as new) or
- Copied (copied from an existing template within your organisation) See “Copying templates”

- To create a new template click “add”



- You will see an option of “reminder” or “reading” select “reading”



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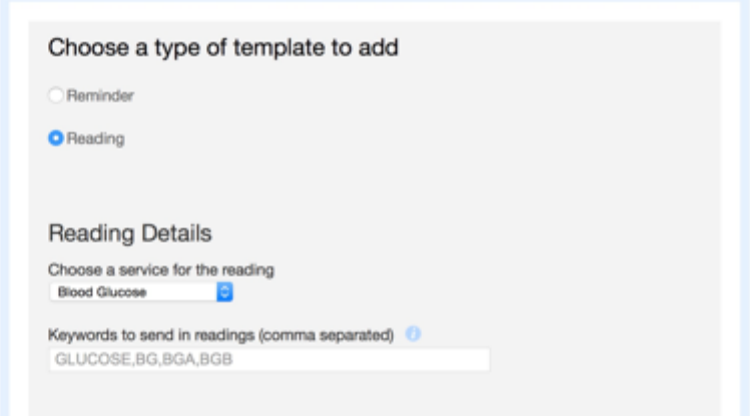
Creating a basic reading template

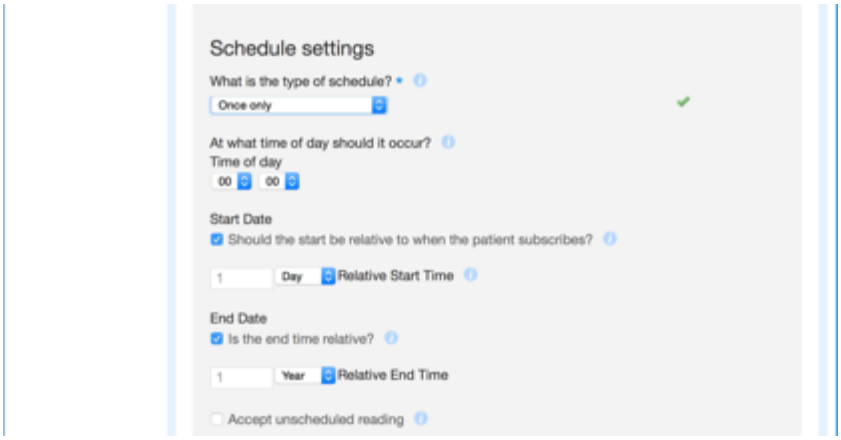
- You will now need to add a "service". In this example Blood Glucose has been selected and the key words for this service have been pre-populated for you.

  Keywords are used by Flo to determine what service a reading is attached to e.g. BG 5.2, Keywords can be changed or added but must be separated by commas with no spaces.

PLEASE NOTE: If any changes are made to the keywords and this protocol is currently active for patients, the active protocols will also be affected by this change. For example if one keyword is removed, Flo would no longer recognize a reading from the patient which uses the removed keyword.



- Now you will need to add a schedule as described above when creating a reminder template.



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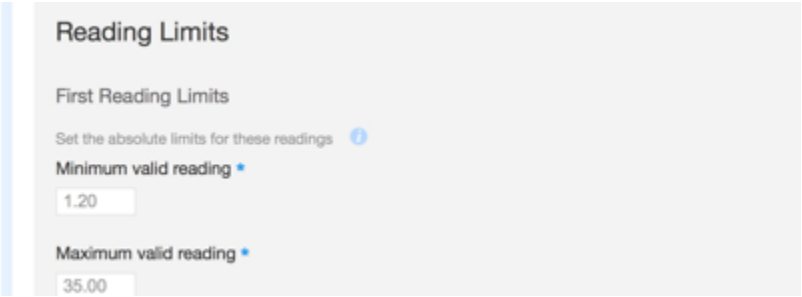
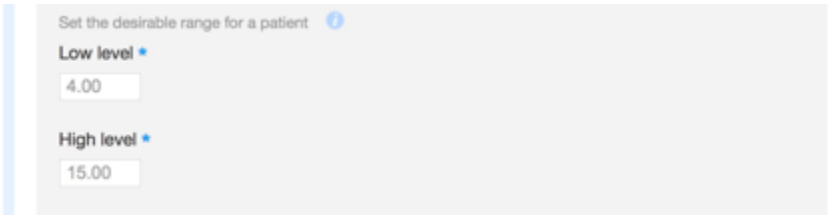
Creating a basic reading template

- There is an option to receive unscheduled readings and if the box is ticked then Flo will accept readings at any time and replay as per the protocol. If not ticked Flo will still record the reading but will respond to the patient with a message advising that she was not expecting a reading at that time.

- Next you will need to add the reading limits (again in this example we are looking at blood glucose).
  Reading limits are set to determine what Flo will accept as a "true reading" any readings sent in outside of this range Flo will consider as an error and will ask the patient to resend i.e. BG 36.



- Now enter the desirable range for the patient. These are the clinical parameters you have determined for your patient, readings sent within this range will trigger the confirmation message.



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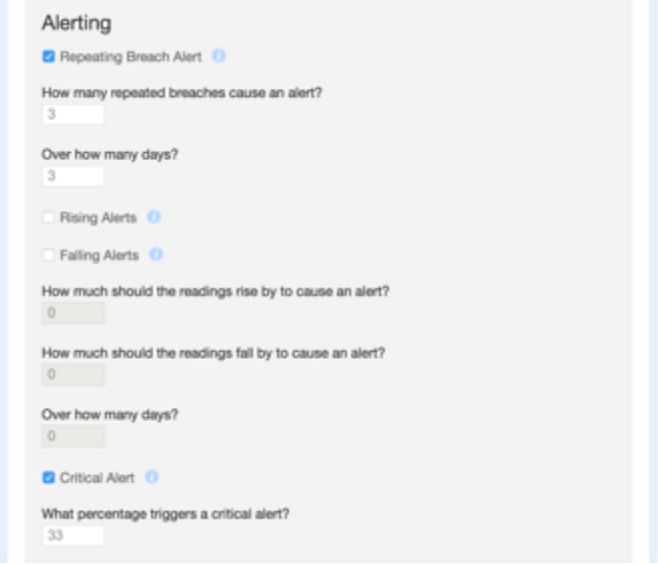
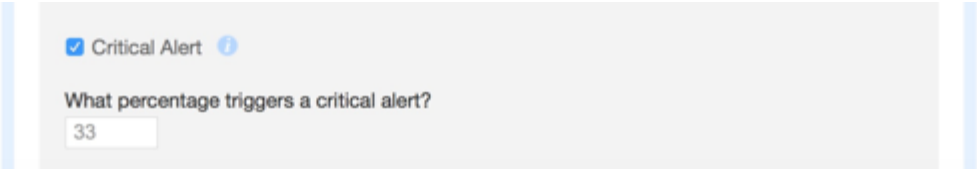
Creating a basic reading template

- Alerts can now be set to be triggered if a patient has sent in readings, which are either higher or lower than their expected range, by the number of breaches within a specified timescale. In the example below 3 readings outside of range within 3 days would trigger the alert message to the patient.



- Rising and falling alerts can also be used if you need to specifically trigger an alert to the patient if their readings have either risen or fallen over a period of time.
- By checking the critical alert box you will trigger both an email to the clinician and the alert message to the patient should any of their readings exceed the percentage above or below their desirable range.

  In this example a patient who returned a reading 33% above a reading of 15 or a reading 33% below 4 would trigger the alert message.



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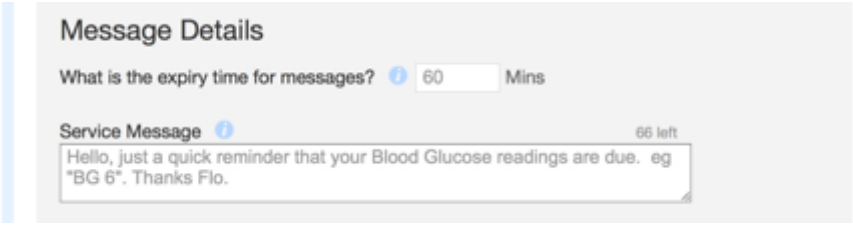
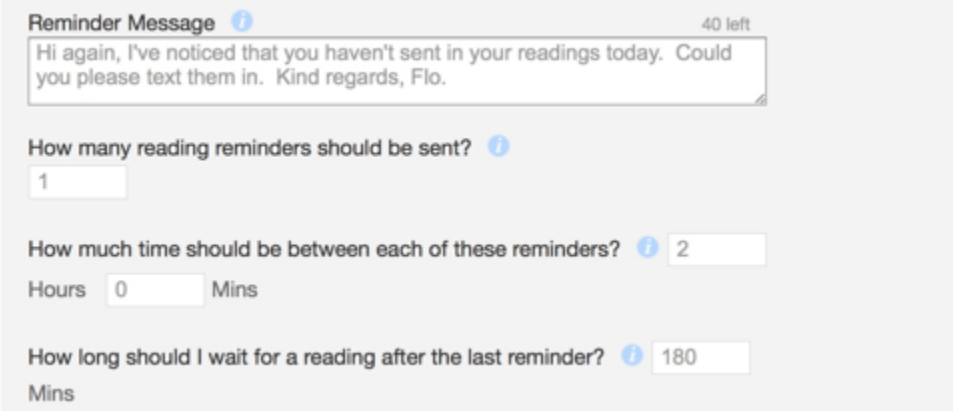
Creating a basic reading template

- **Service Message** – This is the prompt to patients to text in a reading. (For expiry time, see guidance at end)

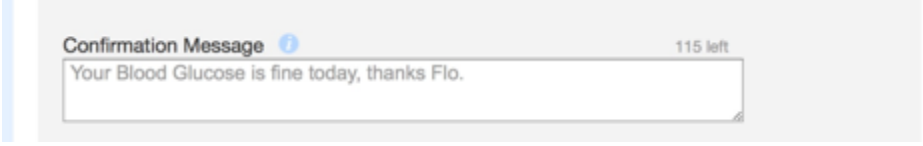


- **Reminder Message** – This is reminder message for patients to text in a reading. You are able to select the number of reminders to send how much time should be between reminders and how long Flo should wait for a reading after the last reminder.

  Please note that if the patient returns a reading after the waiting time following the last reminder has elapsed, the reading will be recorded but Flo will respond to the patient with a message advising that she was not expecting a reading at that time. If this is not appropriate please ensure that the "accept unscheduled readings" box is ticked.



- **Confirmation Message** – This message is sent to acknowledge a reading when it is within the patient's desirable range.



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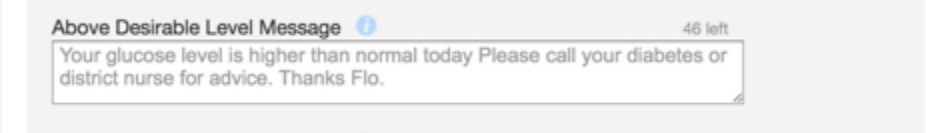
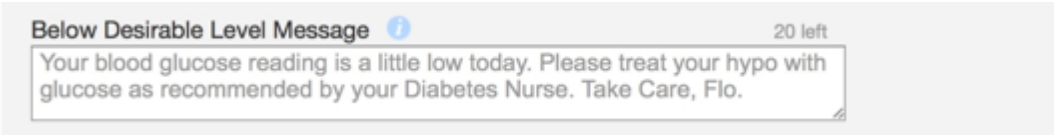
Creating a basic reading template

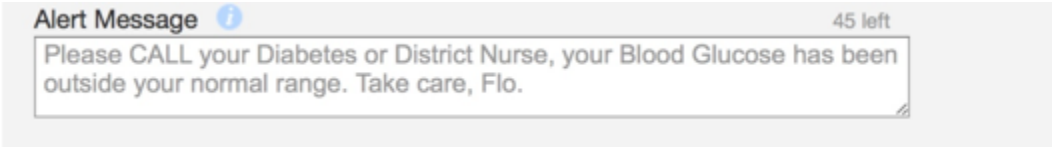
- **Above Desirable Level Message** – This message is sent when a reading is above the patient's desirable range but has not reached either the limits specified for a repeated breach or the percentage value specified for the critical alert.



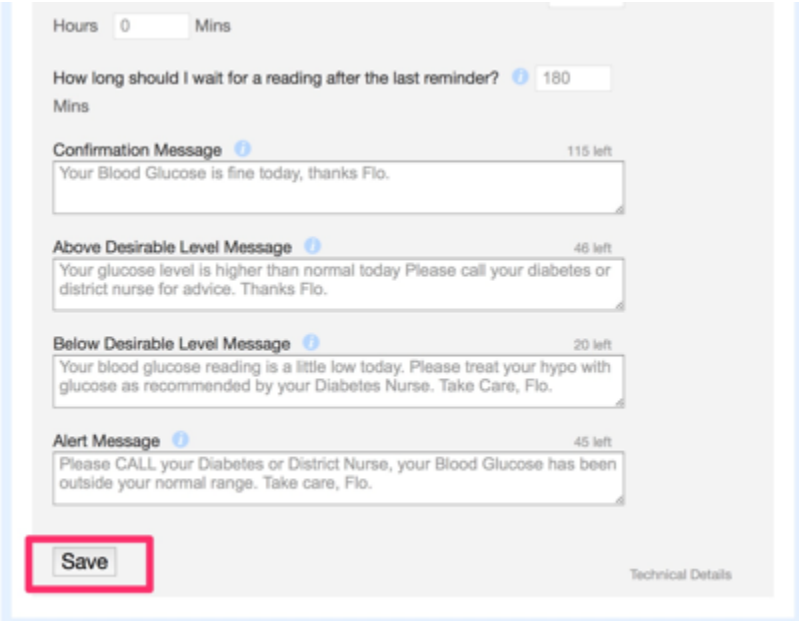
- **Below Desirable Level Message** – This message is sent when a reading is below the patient's desirable range but has not reached either the limits specified for a repeated breach or the percentage value specified for the critical alert.



- **Alert Message** – This message is triggered when a reading breaches either the limits specified for a repeated breach or the percentage value specified for the critical alert.



- Once you are happy with your new template click "Save"



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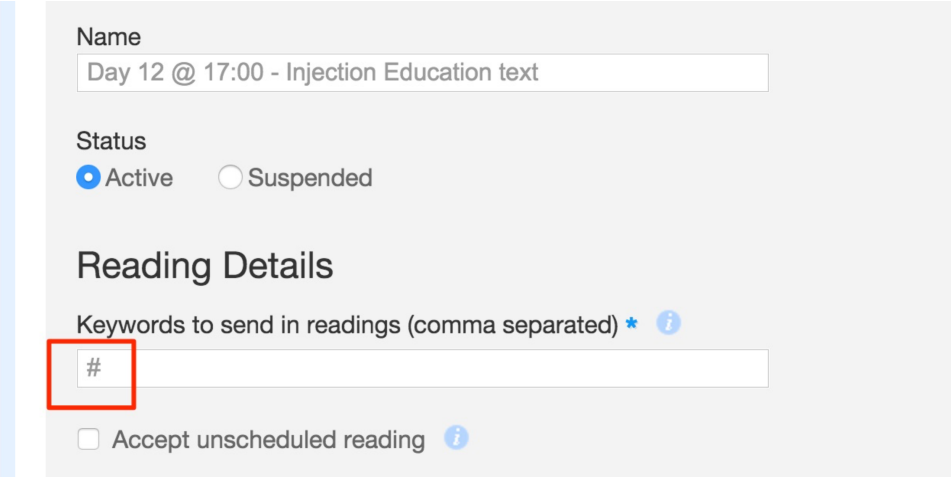
Creating a basic # for more template

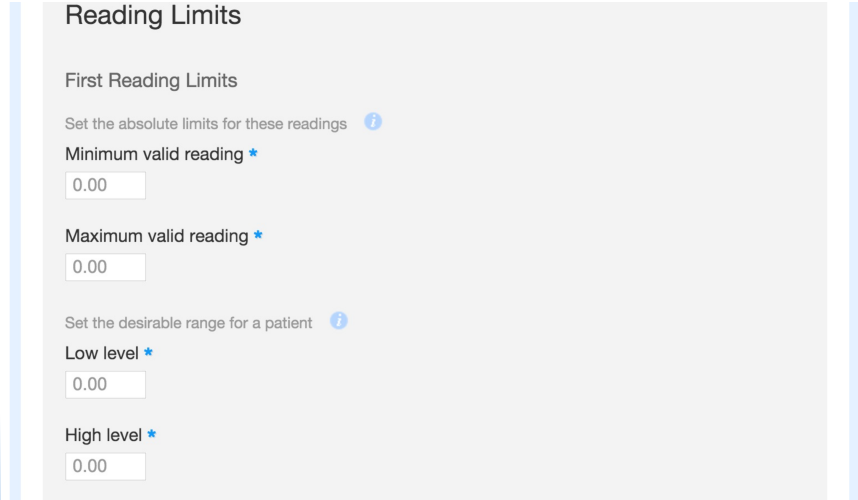
- Sometimes you may want to offer the option to receive additional information about some or all of the content of an advice message to a patient and in this instance you can choose to create a basic # for more template

- To create a # for more template follow the earlier instructions for "Adding a basic reading template"

- When you reach the stage of selecting a service, choose xEvalQ1 which will automatically set your key word to #



- Continue to set up the template with your desired schedule
- All reading limits should be set to 0 to ensure that your optional message will be delivered by texting # only



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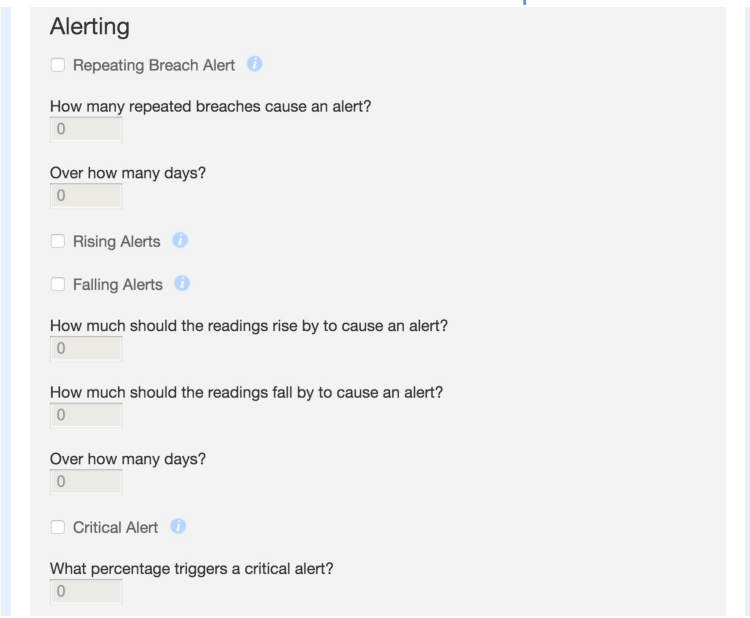
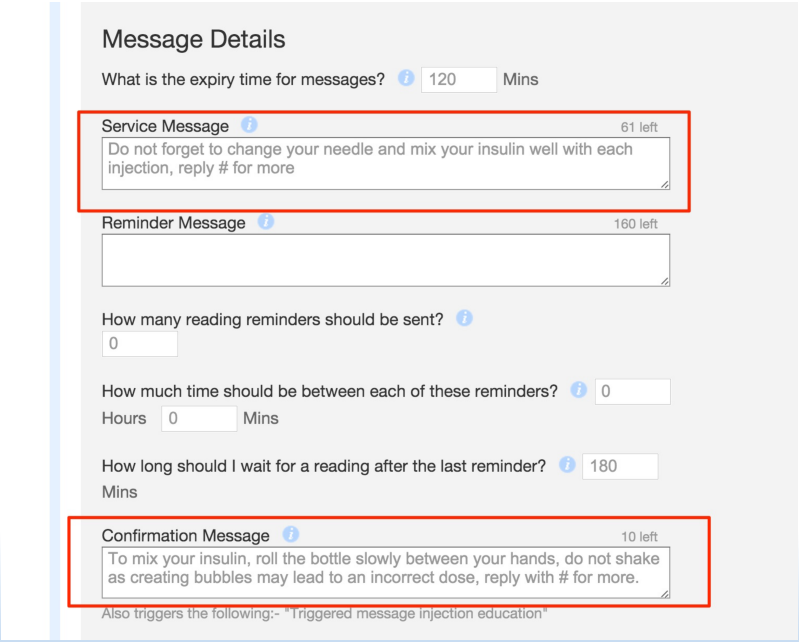
Creating a basic # for more template

- There are no alerts associated with the template so leave the alert section blank.



- Add your service message as usual and add reply # for more at the end of the message. (For expiry time, see guidance at end)

- Then add your optional message content into the confirmation message box as illustrated below and click on save.



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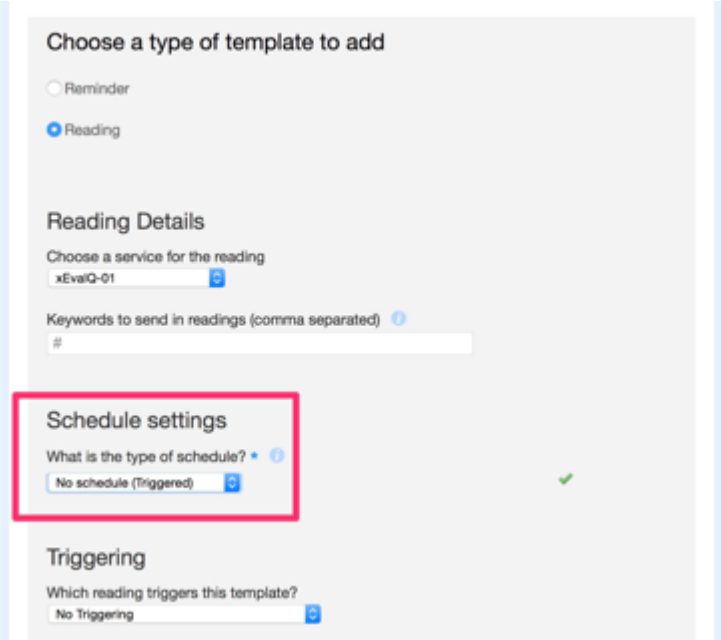
Creating a basic trigger template

- Any reading template can be set as triggered template. However the most common service used for triggered templates are surveys and evaluation questions. A triggered template is simply a reading that is triggered by another template selected from all the available templates within a protocol.

- To enable a template to be triggered after you have chosen your service (in this example xEvalQ-1 has been used) when setting the schedule select No schedule (triggered) from the list of options available.



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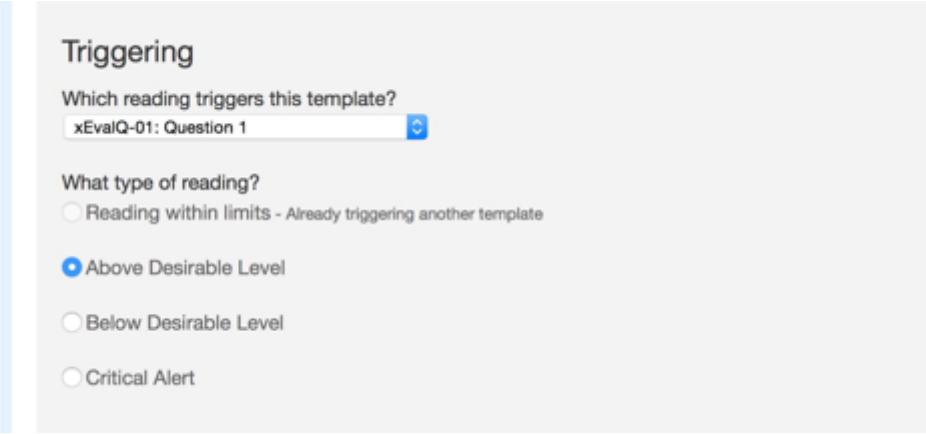
Creating a basic triggered template

- Next select the existing template from the protocol that you would like to use to trigger your new template and specify what reading you would like to trigger this new template.



- **Reading within limits** – Your template will be triggered when a reading is returned within the desirable levels for the selected trigger template.
- **Above desirable level** – Your template will be triggered when a reading is returned above the desirable levels for the selected trigger template.
- **Below desirable level** – Your template will be triggered when a reading is returned below the desirable levels for the selected trigger template.
- **Critical Alert** – Your template will be triggered when a reading returned breaches either the limits specified for a repeated breach or the percentage value specified for the critical alert for the selected trigger template.

Once your schedule has been set you can then continue to set up the remainder of your template in the same manner as your other reading templates and when you're happy with your new template click to save. (For expiry time, see guidance at end)

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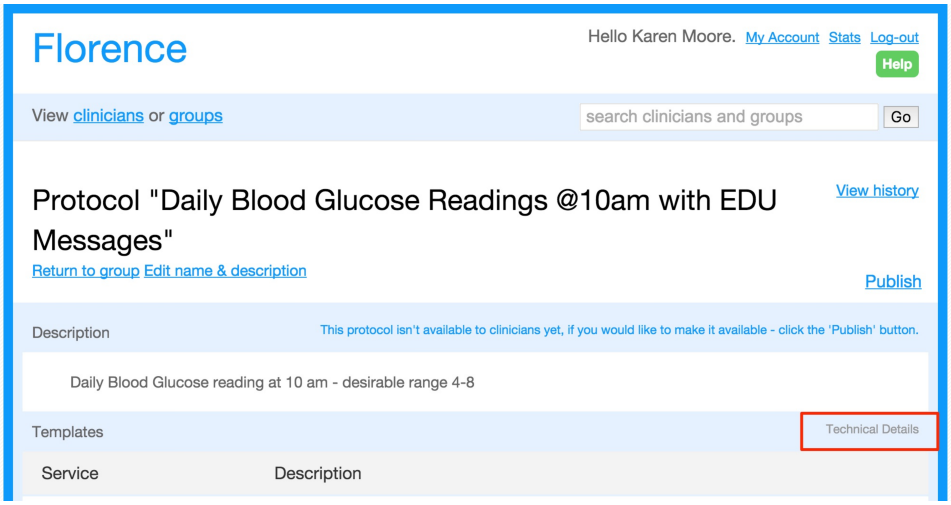
Protocol testing and accessing technical details

Once you have finalized your protocol it is important to test it thoroughly before making it available for use with patients.

It's recommended that in the first instance administrators perform a visual check of the templates they have created by accessing the technical details file for the protocol.

To download the technical details file select your protocol and click on "Technical Details" located on the right hand side of the page



This will generate an excel document where you will be able to view all templates message content and schedules to check for accuracy.

	A	B	AG	AH	AI
1	id	name	event_TEXT	reminder_TEXT	confirmation_TEXT
2	F494114	Triggered message injection education			Insulin doses are refer terms of units. Make s know how many units ask your doctor or nur are unsure.Take care
3	F494112	Day 12 @ 17:00 - Injection Education text	Do not forget to change your needle and mix your inulin well with each injection, reply # for more		To mix your insulin, ro slowly between your h not shake as creating may lead to an incorre reply with # for more.
4	F494111	Nurse monitoring reminder day 7 @ 11am	Hi, Your Diabetes Nurse will be reviewing all of your readings and will call you over the next few days if necessary. Take care, Flo.		

Once you are satisfied that your templates are correct it is recommended that is thoroughly tested by either the administrator or the clinical team. If your protocol runs over a long period of time it may be necessary to take a copy and adjust the schedule timing to allow testing over a reasonable time frame.

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Guidance notes for creating protocols

Naming conventions – naming of protocols is important. The name of the protocol will appear in the protocol menu when the clinician "adds a service" and is also visible by the clinician when reviewing the patient's record. Therefore the name of a protocol should be sufficiently clear to describe how the protocol works yet easily understood.

Typical examples are "North DSN BG Type 2 (4.2-8.0) 3/3 days M-F 9am " this describes a type 2 blood glucose protocol for Diabetes Specialists in the North Team, Flo will prompt the patient for readings at 9am Monday to Friday. The desirable range is 4.2-8.0 and the "alert" message will be triggered once 3 readings outside of the desirable range have been received within 3 days.

Administrators may wish to apply local guidance on naming conventions across their organisation to maintain consistency.

Expiry time – this is the amount of time that Flo will keep trying to deliver the message if for example the patient's phone is switched off, or is out of signal. After this time, Flo will stop trying to deliver this message.
Expiry times must be set to ensure that the patient receives the most current message i.e. that the maximum expiry time does not overlap with the time of the next message.
Expiry times should reflect the timespan within which the content of the message is appropriate e.g. for medication reminders, if Flo is prompting the patient to take their morning tablets, the expiry time must be set to ensure that the message can only be delivered within an appropriate time frame.

Message content – messages from Flo should be no more than 160 characters long, including spaces to ensure that they are concise and clear which maximises their impact. To maintain the patient's engagement references to Flo are useful such as " "Hi it's Flo" or messages ending with "take care, Flo".

Alerts - Will notifications to clinicians be part of the overall design? Which responses from patients would be useful for clinicians to be informed of to facilitate earlier intervention? Thought should be taken with regard to notifications; it is important to remember that Flo is supporting the patient to self-manage and is not a reactive triage service.

It is important that the patient understands that they should follow the advice provided by Flo, and that their responses in the majority of cases, will not be monitored in real time. Therefore try to consider the impact of a clinician receiving a notification perhaps that a patient's reading have been out of range and how this would alter the dynamic of using Flo as a tool to support patients to self manage.