

Welcome to today's session

# Florence Advanced Administrator Training

Your presenter for today's session:

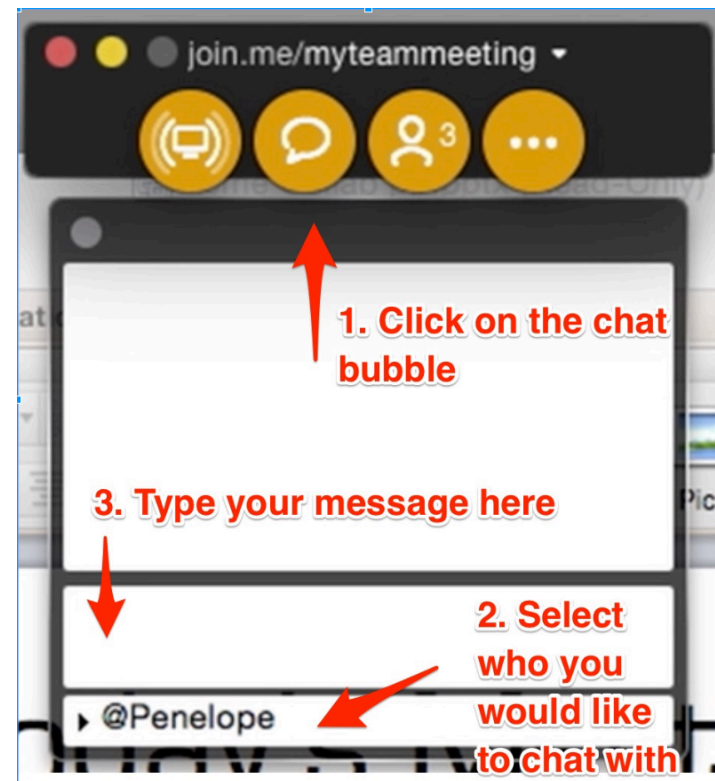
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# If you have any questions

- If you have any questions during today's presentation please use the chat function
- If you have dialed into today's session please mute your phone during the presentation to avoid any feedback sound
- Unmute at the end to be able to ask any questions



# Today's session

- Messaging Schedules
- Notifications
- Yes/No Template
- Testing Protocols
- Flo Reporting
- Evaluation
- Rules in Flo
- Troubleshooting

# Messaging Schedules

Which schedule should I choose?

- The most important thing with schedules is to find the right balance of flexibility for clinicians and ease of administrating changes at both clinician and protocol level.
- The first things you should consider is whether this is to be a one off protocol or will this be reused for subsequent courses? In either scenario you would need to consider any exceptions to the rule, i.e. if the day of the week is Monday are there any bank holidays that fall within the schedule?
- The second point would be to consider when the patient would be enrolled, if you're using 'once only' or 'every so many days/weeks' the enrollment date will be critical to the delivery of the messages.
- Finally it's important to consider the impact of any changes that may be needed once the protocol is live, i.e. a late cancellation or perhaps a change in day?

# Messaging Schedules

Which schedule should I choose?

SCHEDULE SETTINGS	
Clinician & Admin	<p>Schedule Type</p> <ul style="list-style-type: none"> <li>-Once</li> <li>-Certain days of the week</li> <li>-Every so many days</li> <li>-Every so many weeks</li> <li>-Every so many months</li> </ul>
Clinician & Admin	<p>IF - Days of Week, which days</p> <ul style="list-style-type: none"> <li>-Su</li> <li>-Mo</li> <li>-Tu</li> <li>-We</li> <li>-Th</li> <li>-Fr</li> <li>-Sa</li> </ul>
Admin Only	<p>IF – Every so Many, how many days/weeks/months between each cycle?</p>
Clinician & Admin	<p>At what time ?</p>
Admin Only	<p>Is the start day to be delayed ? (relative to the day this protocol is added to a patient)</p> <ul style="list-style-type: none"> <li>-No</li> <li>-Yes</li> </ul>
Admin Only	<p>How long by ?</p> <ul style="list-style-type: none"> <li>-days</li> <li>-weeks</li> <li>-months</li> <li>-years</li> </ul>
Clinician & Admin	<p>How long should this continue for before automatically ending ? (relative end time must be "checked")</p> <ul style="list-style-type: none"> <li>-days</li> <li>-weeks</li> <li>-months</li> <li>-years</li> </ul>

# When to use Notifications

## Are Notifications to Clinicians Adding Value?

- Notifications to clinicians can be an integral part of their integration of Flo in specific cases; and can add value when targeting interventions for certain patient cohorts. However, caution should always be taken with regard to incorporating notifications into your protocol design.
- It is wise to first consider the impact of a clinician receiving a notification. Typically an alert message will ask the patient to call the clinician but would some clinicians feel the need to contact the patient immediately? If this were the case the next time Flo advised the patient to contact their clinician would the patient follow the advice or simply wait for a call?
- It's also worth considering usual practice, is the service 24hrs a day 365 days per year? Would the clinician respond the same way at 2am on a Sunday morning as they would at 2pm on a Thursday afternoon?
- Remember Flo is a tool to empower the patient to self manage better and is not typically a reactive triage service. It's vital that patients are made aware of this and agree to follow any prompts they receive. As such if your clinicians do want to respond to alerts its important to ensure that these responses are planned in the pathway to ensure consistency and that they aren't counterproductive to the key message of patient self management.

# When to use Notifications

## When should I recommend Notifications?

- Notifications are useful where the advice given to patients changes at a predefined threshold in their readings e.g. for a weight management protocol you may want to send different advice or request patient contact if their loss or gain is x amount above or below their target range. Similarly for COPD patients a notification can be used to prompt a patient to begin using their rescue medication to prevent further exacerbation of their symptoms.
- Sometimes including notifications for a short time as reassurance when increasing self-management with patients can be useful. Once reassured and confident with the system, clinicians will often no longer feel the need for notifications and disable them. Although it is worth bearing in mind the points discussed before making a final decision to include them.

# Critical Alert Notifications

## Critical Alerts: Using the Critical Alert Tool

To make things simpler we have designed a critical alert tool which will perform the calculation for you when the values are entered. This will be sent out as part of the learning resources following the session.

		10 %	
<i>First reading/Systolic</i>			
		100	Max High
<b>Critical Alert Level(&gt;)</b>	100		
High Desirable	100		
Low desirable	92		
<b>Critical Alert Level(&lt;)</b>	88		
Min Low	52		
<i>Second reading/Diastolic</i>			
		185	Max High
<b>Critical Alert Level(&gt;)</b>	104		
High Desirable	95		
Low desirable	45		
<b>Critical Alert Level(&lt;)</b>	41		
		5	Min Low



# Creating a basic yes/no template

How to and things to consider..

- It is possible to create a yes/no template in Flo but these should be approached with caution as it requires the creation of a “hidden” template which can cause issues if a patient is signed up to more than one protocol with readings at similar times.
- With this in mind it’s important to ensure that if you choose to use this method, any other protocols assigned to a patient would ideally only include reminders.
- To create a yes/no template you first need to create your “yes” response template using a generic service such as xEvalq1, in this you need to amend the keyword to yes with all reading limits set to be zero.
- Continue to add your service message which includes the request to reply with yes or no. For example, “Hi it’s Flo, have you taken your medication this morning? Reply with Yes or No.”
- You would then enter the “Yes” response *only* into the confirmation message field, e.g. “That’s great! Take care, Flo.”

# Creating a basic yes/no template

How to and things to consider.

- You can also include a reminder in the yes template as in the example below;

### Message Details

What is the expiry time for messages? ?  Mins

**Service Message** ? 118 left

**Reminder Message** ? 118 left

How many reading reminders should be sent? ?

How much time should be between each of these reminders? ?   
Hours  Mins

How long should I wait for a reading after the last reminder? ?   
Mins

**Confirmation Message** ? 151 left

**Above Desirable Level Message** ? 160 left

**Below Desirable Level Message** ? 160 left

**Alert Message** ? 160 left

Technical Details

# Creating a basic yes/no template

How to and things to consider.

- You would then need to create a further template with identical timing using the same service replacing the keyword with No. To enable you to flag any No responses in this template you will need to set the reading limits to 0-1 with 1 being the desirable range. Next you will need to add a repeating alert of 1 reading in 1 day and add your “No” response to the alert field. All other field must be left blank on this template.
- If you have used a reminder make sure that your expiry time matches the total time in the yes template. In the example used on the previous slide there is a single reminder after 30 minutes with an expiry time of 30 minutes. So, to ensure that the templates match the expiry time on the “No” template will need to be set to 60 minutes
- As this works on the principle of a master “Yes template with a hidden “No” template running along side it’s important to indicate to clinicians that the time of the message should never be altered. It’s a good idea therefor to ensure that you include FIXED TIME DO NOT CHANGE in both the protocol name and description and also in the template name to prevent errors.

# Creating a basic yes/no template

How to and things to consider.

## “Yes” Template

### Editing xEvalQ-01 Reading

Name

Daily tablet reminder @ 10:30 (Yes response/fixed time DO NOT)

Status

☒ Active ☐ Suspended

### Reading Details

Keywords to send in readings (comma separated) \* ?

Yes,

☐ Accept unscheduled reading ?

### Schedule settings

What is the type of schedule? \* ?

On certain days of the week

Days of the week

Upon which days should the template apply?

☒ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☒ Saturday

At what time of day should it occur? ?

Time of day

10 30

Add a time

## “No” Template

### Editing xEvalQ-01 Reading

Name

Daily tablet reminder @ 10:30 (No response/fixed time DO NOT)

Status

☒ Active ☐ Suspended

### Reading Details

Keywords to send in readings (comma separated) \* ?

No,

☐ Accept unscheduled reading ?

### Schedule settings

What is the type of schedule? \* ?

On certain days of the week

Days of the week

Upon which days should the template apply?

☒ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☒ Saturday

At what time of day should it occur? ?

Time of day

10 30

Add a time

# Creating a basic yes/no template

How to and things to consider.

## “Yes” Template

Start Date

☒ Should the start be relative to when the patient subscribes? [?](#)

Relative Start Time [?](#)

0 Day [?](#)

End Date

☒ Is the end time relative? [?](#)

Relative End Time

1 Year [?](#)

### Reading Limits

First Reading Limits

Set the absolute limits for these readings [?](#)

Minimum valid reading \*

0.00

Maximum valid reading \*

0.00

Set the desirable range for a patient [?](#)

Low level \*

0.00

High level \*

0.00

### Alerting

☐ Repeating Breach Alert [?](#)

How many repeated breaches cause an alert?

0

Over how many days?

0

## “No” Template

### Reading Limits

First Reading Limits

Set the absolute limits for these readings [?](#)

Minimum valid reading \*

0.00

Maximum valid reading \*

1.00

Set the desirable range for a patient [?](#)

Low level \*

1.00

High level \*

1.00

### Alerting

☒ Repeating Breach Alert [?](#)

How many repeated breaches cause an alert?

1

Over how many days?

1

☐ Rising Alerts [?](#)

☐ Falling Alerts [?](#)

How much should the readings rise by to cause an alert?

0

How much should the readings fall by to cause an alert?

0

Over how many days?

0

☐ Critical Alert [?](#)

# Creating a basic yes/no template

How to and things to consider.

## “Yes” Template

Message Details

What is the expiry time for messages? ⓘ 60 Mins

Service Message ⓘ 118 left

Have you taken your tablet? Text Yes or No

Reminder Message ⓘ 118 left

Have you taken your tablet? Text Yes or No

How many reading reminders should be sent? ⓘ

1

How much time should be between each of these reminders? ⓘ 0

Hours 30 Mins

How long should I wait for a reading after the last reminder? ⓘ 30

Mins

Confirmation Message ⓘ 151 left

Well-done

Above Desirable Level Message ⓘ 160 left

Below Desirable Level Message ⓘ 160 left

Alert Message ⓘ 160 left

Save

Technical Details

## “No” Template

Message Details

What is the expiry time for messages? ⓘ 60 Mins

Service Message ⓘ 160 left

Reminder Message ⓘ 160 left

How many reading reminders should be sent? ⓘ

0

How much time should be between each of these reminders? ⓘ 0

Hours 0 Mins

How long should I wait for a reading after the last reminder? ⓘ 60

Mins

Confirmation Message ⓘ 160 left

Above Desirable Level Message ⓘ 160 left

Below Desirable Level Message ⓘ 160 left

Alert Message ⓘ 105 left

Please remember how important it is to take your tablet

Save

Technical Details

# Testing Protocols

## Reviewing technical details

It's important to test your protocols thoroughly before making them available for use with patients.

In the first instance it's worth performing a quick visual check of the 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

The screenshot shows the Florence web interface. At the top, the 'Florence' logo is on the left, and user information 'Hello Karen Moore.' with links for 'My Account', 'Stats', and 'Log-out' is on the right. A green 'Help' button is also present. Below this is a navigation bar with 'View [clinicians](#) or [groups](#)' and a search bar labeled 'search clinicians and groups' with a 'Go' button. The main content area displays the protocol title 'Protocol "Daily Blood Glucose Readings @10am with EDU Messages"' with a 'View history' link. Below the title are links for 'Return to group', 'Edit name & description', and 'Publish'. A description box contains the text 'Daily Blood Glucose reading at 10 am - desirable range 4-8'. At the bottom, there is a 'Templates' section with a table header showing 'Service' and 'Description'. A red box highlights the 'Technical Details' link on the right side of the page.

# Testing Protocols

## Reviewing technical details

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 referred in terms of units. Make sure you know how many units you are taking. If you are unsure, ask your doctor or nurse. Take care.
3	F494112	Day 12 @ 17:00 - Injection Education text	Do not forget to change your needle and mix your insulin well with each injection, reply # for more		To mix your insulin, roll the vial slowly between your hands. Do not shake as creating air bubbles may lead to an incorrect dose. 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 should be thoroughly tested by either the administrator or the clinical team. If the protocol runs over a long period of time it may be necessary to take a copy into your demo group and adjust the schedule to allow testing over a reasonable time frame. Always use the longest period available for testing to establish not just whether the messages are delivered correctly but also to check that they are timely and not too frequent.



# Making use of Flo reporting

## Getting the best out of standard reports

### Readings received data

This is the first excel data report listed and includes all data on messages received along with the patient and clinician IDs and the protocols being used.

**Uses include:** This report whilst only containing readings data can be very useful for identifying potential areas of concern. The final column in the data shows any alerts that have been triggered by a patients response and this can assist in identifying issues with protocol set up i.e. parameters not being adjusted for patients or indeed clinical inertia. Regular review of this data can often provide good clues as to how well your clinicians are using Flo.

### User Contact information

Excel report detailing contact information for all users indicating their status as either active or deleted.

**Uses include:** This report is particularly useful for audit and housekeeping but has also been utilised to create and maintain email contact lists for individual local communications

# Making use of Flo reporting

## Getting the best out of standard reports

### **Patients without protocols by clinician**

This report indicates the number of patients who are opted into Flo but have no active protocols.

**Uses include:** Mainly for housekeeping it may be that some patients are in between protocols however it is likely that a good proportion will have simply not been discharged and so it may be an idea to distribute this information directly to clinicians affected to ensure that patients are discharged appropriately.

### **Patient summary**

This report provides cumulative figures for patient invites, enrollments, discharges and stoppages over the entire licensing period and for the current month. There are also 2 graphical representations of the data included in the report.

**Uses include:** This report has been designed as an overall progress dashboard. However the data needs to be approached with caution and should only be used to identify trends, as this report does not currently exclude any demo protocols patients added and includes patients who have no active protocol. For accurate activity reporting please refer to your monthly activity report from us.

# Evaluation

## Standard evaluation question sets

### D006 Example 3 question evaluation set (Score 1-9)

#### [Q3 - How much has Flo helped you to establish better habits with your ...](#)

Reading: Triggered by Survey Ans2 "Q2 - Has Flo increased your motivation to imp...

Message: Thanks, how much has Flo helped you to establish better habits with yo...

---

#### [Q2 - Has Flo increased your motivation to improve your health?](#)

Reading: Triggered by Survey Ans1 "Q1 - Do you feel more interested in your heal...

Message: Thanks, has Flo increased your motivation to improve your health? Plea...

---

#### [Q1 - Do you feel more interested in your health since using Florence?](#)

Reading: Once @ 18:05

Message: Do you feel more interested in your health since using Flo? Reply with...

---

### D007 Example 3 Q evaluation set (#1 or #2 response)

#### [Q3 - Did you find Flo easy to use?](#)

Reading: Triggered by Survey Ans2 "Q2 - Do you prefer to send your readings in v...

Message: Thanks, please reply with #1 if you felt that Flo was easy to use, or ...

---

#### [Q2 - Do you prefer to send your readings in via Flo than got to your p...](#)

Reading: Triggered by Survey Ans1 "Q1 - Would you recommend Flo to your family a...

Message: Thanks, please reply with #1 if you prefer to send your readings to th...

---

#### [Q1 - Would you recommend Flo to your family and friends?](#)

Reading: Once @ 18:05

Message: Please reply with #1 if you agree with the statement "I would recommen...

# Rules in Flo

## Services: Protected services

Flo includes a number of protected services which allows only one active template at any one time to maintain safety and ensure that different parameters can't be active for the same patient (see below).

### List of protected services:

Peak Flow	Blood Glucose T1
Pain Scale	Blood Glucose T2
Pain Medication	Blood Glucose B+A
Palliative Care	Alanine Aminotransferase
Glucose Before Eating	Battery
Glucose After Eating	Blood Pressure
Craving	Blood Oxygen
Protein	Pulse Rate
INR	Body Temperature
Weight	Blood Glucose

# Troubleshooting

## Common workarounds and best practice

- When using the once only schedule or multiple templates with the same keywords. Messages should only be valid on the calendar day that the message is to be sent, be mindful of expiry times and ensure that they are set to expire no later than 11:59 on the same day
- Where you have created a reading template which does not include alerts or uses only the rising or falling alert criteria you will need to enter the repeating alert criteria as 999 breaches in 1 day this will enable clinicians to adjust the desirable range for individual patients without impacting on the desired alerting criteria.
- Reminder templates will not trigger the “I haven’t heard from this patient” notification
- Take care when entering keywords don’t include spaces unless they form part of the keyword and always ensure that each keyword is separated with a comma with the exception of the final keyword to used.
- Where possible avoid using keywords less than 3 characters in length and if this is a requirement try to use a numerical value at the end to avoid any cross matching against other keywords which may be in use on adjoining templates.
- When transferring a patient outside of their existing group, the receiving clinician will need to add the patient to enable the transfer to take place.
- .

# Troubleshooting

## Common workarounds and best practice

- Where a triggered template needs to be suspended, ensure that the parent template is suspended first.
- When copying templates if triggered templates are included ensure that the connected template is updated. Where a connection is duplicated the trigger may revert to a non triggered state and so will need to be re-connected to the parent template/
- If more than 1 clinician is connected to a patient, each clinician needs to individually to discharge the patient fully from Flo.
- When setting a template for immediate delivery upon opting in. Set time to 8am and set a long expiry time within the 24hr period e.g. 12hours, this will ensure that the message is sent whenever the protocol is added.
- When using a repeating schedule e.g. “every 6 month with the relative start day as day 0, the message will go out on day 0 and then every 6 months thereafter. Alternatively if you set the relative start date to 6 months (in days) the message will only be sent every 6 months starting at month 6
- When discharged the patient will disappear from the clinicians list if no other clinicians in the same group have a connection. The data is retained and be made available again if another clinician connects to the patient by adding them.
- If the patient texts STOP, the services will be stopped and the patient will be removed from the clinicians list, however Flo retains the link to the clinical group. If GO is clicked when the search box is empty, these patients will be visible to clinicians in the group.