Patient workflow

- Patient diagnosed

  Patient registration
  
  Initiated on treatment and adherence tech

  Patient reports adherence daily

  Patient completes treatment

  Trends and data

  Adherence calendar

  View all patients in the facility

  Overview and reports

  Patient outcomes

  Patient management

  Adherence management - Task lists, support actions

  Follow-ups with patient requiring support

  Changing adherence calendar after follow-up

  Adherence management - Manual, missed doses

  Patient outcomes

  Trends and data

  Overview and reports

  Patient management

  Adherence management - Task lists, support actions
The Patient Registration module allows you to register patients on the Hub using a simple yet comprehensive registration form.

Patient demographic and contact details, treatment regimen and length along with other basic details are captured.

One of the three adherence technologies can be allocated to a patient here - 99DOTS, Video observed therapy (VOT) or MERM.
How do I register a Patient (1/3)

Step 1 - Click on the ‘Add patient’ tab
Step 2 – Enter required details
Step 3 – Add phone numbers of patient and family/friends/treatment supporters

For 99DOTS, the dashboard turns green only if call is received from one of these registered phone numbers
Mention all details that are marked as ‘required’ to proceed
How do I register a Patient (2/3)

Step 4 - Choose the geography/facility
Step 5 – Pick the VOT as the adherence technology

Step 6 – Enter the medical record number and pick the treatment start date
Step 7 - Submit the form

- When did the patient start taking TB medicine? For eg. 1 May 2020
- When did the patient enroll for digital adherence? This date cannot be earlier than above date eg. 1 May 2020
How do I register a Patient (3/3)

The User ID and pin created for the patient is displayed after registering the patient.

- The user name and pin can be accessed later under the ‘Tags and notes’ section.
- Provide the patient with their user ID and pin, which they can use to login to the app, and share videos everyday.
How do I assign SMS notification timing

Step 1 - Click on the ‘Engagement’ tab
Step 2 – Select ‘Edit details’
Step 3 – Select ‘Yes’ and the timing
Step 4 - Click on ‘Update’

The patient page can be accessed through the current patient list or by searching for the patient in the search bar.

The reminder timings can be changed anytime.
How do I edit basic details (1/2)

Step 1 – Click on the Basic details tab of the patient

Step 2 – Click on Edit Details
How do I edit basic details (2/2)

Step 3 – Make the necessary changes

<table>
<thead>
<tr>
<th>Category</th>
<th>Info</th>
<th>Step 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
<td>Rakel</td>
<td></td>
</tr>
<tr>
<td>Last name</td>
<td>Aino</td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td>kampala</td>
<td></td>
</tr>
<tr>
<td>Primary Number</td>
<td>440130264</td>
<td></td>
</tr>
<tr>
<td>Who does it belong to?</td>
<td>Patient</td>
<td></td>
</tr>
<tr>
<td>Secondary number 1</td>
<td>2483664422</td>
<td></td>
</tr>
<tr>
<td>Who does it belong to?</td>
<td>Father</td>
<td></td>
</tr>
<tr>
<td>Secondary number 2</td>
<td>3421454656</td>
<td></td>
</tr>
<tr>
<td>Who does it belong to?</td>
<td>Sister</td>
<td></td>
</tr>
</tbody>
</table>

Step 4 – Click on Submit Changes
Patients upload videos of taking their pills through a mobile app, after logging in with their username and pin provided during registration.
An adherence calendar is associated with each patient registered on the Hub.

The hub allows seamless access to daily and monthly adherence calendar at patient and facility level.

This feature also provides the opportunity for healthcare workers to manually report missed and confirmed doses.
An adherence calendar indicates the ‘dose-taken’ status of the patient on each day, indicated by the colour for that date.
### Adherence calendar colours

<table>
<thead>
<tr>
<th>Colour</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🟣</td>
<td>Treatment Start / End</td>
</tr>
<tr>
<td>🟢</td>
<td>Received (using technology)</td>
</tr>
<tr>
<td>🟡</td>
<td>Manually confirmed</td>
</tr>
<tr>
<td>🟠</td>
<td>No dose needed</td>
</tr>
<tr>
<td>🔴</td>
<td>No information</td>
</tr>
<tr>
<td>⚫</td>
<td>Confirmed missed dose</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✉️</td>
<td>Patient started on Digital Adherence Technology (DAT)</td>
</tr>
<tr>
<td>🟢</td>
<td>Patient reported dose through assigned DAT</td>
</tr>
<tr>
<td>🔴</td>
<td>Patient did not report dose through assigned DAT</td>
</tr>
<tr>
<td>🟦</td>
<td>Patient reported dose through 99DOTS, but shares phone number with another patient</td>
</tr>
<tr>
<td>⚫</td>
<td>Staff manually confirmed dose taken, when patient did not report digitally</td>
</tr>
<tr>
<td>🔴</td>
<td>Staff manually confirmed dose as not taken, when patient did not report digitally</td>
</tr>
<tr>
<td>🟡</td>
<td>Patient temporarily off-treatment</td>
</tr>
<tr>
<td>⚫</td>
<td>Patient on VOT sent in video, that is yet to be reviewed</td>
</tr>
</tbody>
</table>
Click on Adherence tab to view patient level adherence calendar, after clicking on the required patient’s ID from the Patient Management page.
Marking manual doses (1/4)

**Step 1**
- Click on Adherence Tab

**Step 2**
- Click on Mark/Remove manual doses
Marking manual doses (2/4)

Step 3 – Select the dates

Step 4 – Click on Confirm altering manual doses
Step 5 – Click on Mark as Manual
Calendar updated with light green colour, indicating that the dose reported as taken is manually entered.
Marking missed doses (1/4)

Step 1 – Click on Adherence Tab

Step 2 – Click on Mark/Remove manual doses
Step 3 – Select the dates

Step 4 – Click on ‘Confirm altering missed doses’
Step 5 – Confirm by clicking on ‘Mark as Missed’
The selected dates will now be maroon in colour, to reflect the doses that have been confirmed as missed.
Updating information on the platform through manual calendar changes, tags and notes.

Understanding patient adherence behaviour by reviewing videos.

Logging interactions with patients – Calls, house visits, asking patients to visit facility.

Updating information on the platform through manual calendar changes, tags and notes.
After clicking on “Review VOT Videos” on the sidebar, staff can review newly uploaded videos (and past submitted videos) by clicking on ‘View’ and mark them as “Confirmed” or “Not Confirmed.”
Staff can mark the following after reviewing the video:

- **Confirmed** (if it is clear that the patient has taken the medicine)
- **Not Confirmed** (if it is clear the patient has missed taking the medicine)

Click on “Save Status” to finish. The video is now reviewed and taken out of the video list (queue).
After interacting with patients, based on their adherence reporting, these interactions can be recorded on the platform for future reference, under ‘Support actions’. Front-end workers can choose categories and subcategories of action performed for seamless recording of follow-up -

- Calling
- Making a home visit
- Asking patients to make a visit to the facility
Marking Support actions

Step 1 - Click on Support Actions to log actions
Step 2 – Select the type of interaction
Step 3 - Select the outcome of the interaction
Step 4 – Click ‘Add’ to record the action

Other notes can be added under the ‘comments’ field
Adherence Management: updating behaviour

- The **Tags and Notes** functionality allows front-end workers to make essential notes pertaining to patient's care plan.

- These notes can also be tagged under the available categories.

- The calendar too can be updated manually, through manual and missed doses (changing colour of calendar and logging dose).
How to add Tags and Notes

Step 1 – Click on Tags & Notes Tab
Step 2 – Choose the appropriate tag (one or more) and/or add in a note in the free text field
Step 3 – Click on Submit button
As a health care worker, it is essential to follow-up with patients who need **additional support with their treatment**.

The hub allows **easy identification** of such patients through various tools - **adherence calendar and task lists**.

Patient names, along with selected information can be viewed as a **list**, or in the form of an **adherence calendar**.
How to view the list of patients?

Step 1 - Click on ‘Patient engagement’
Step 2 – Choose required filters
Step 3 – Click on ‘Search’
Step 4 – Select ‘List view’

Four filters are there - Geography, Patient status, Treatment start date and adherence technology
Step 1 – Select required geographies
Step 2 – If applicable, select further geographies under the ones selected earlier
Step 3 – Select patient’s treatment status
Step 4 - Select the range of treatment start dates of patients in the final list

Step 5 – Check one or more technologies that you would like to view
Choosing column headers in the list view

Step 4 - Select the dropdown above the list, titled “x columns selected”
Step 5 – Check the required information to be displayed

- Only 9 columns can be selected at any point, with the first 9 being selected by default
- Patient list is displayed across different pages, which can be viewed through the navigation on the right side
How to view the patient calendar?

Step 1 - Click on ‘Patient engagement’
Step 2 – Choose required filters
Step 3 – Click on ‘Search’
Step 4 - Select ‘Calendar’
Patient calendar view

<table>
<thead>
<tr>
<th>Tech</th>
<th>ID</th>
<th>Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>99DOTS</td>
<td>382</td>
<td>Andres Homes</td>
</tr>
<tr>
<td>99DOTS</td>
<td>454</td>
<td>Maria Banat</td>
</tr>
<tr>
<td>99DOTS</td>
<td>432</td>
<td>Preeti Jha</td>
</tr>
<tr>
<td>99DOTS</td>
<td>353</td>
<td>Anika Mesul</td>
</tr>
</tbody>
</table>
Once a patient completes treatment, or for other reasons, patient records can be closed after assigning one of the available outcomes.
**Cured** – Patient who has completed treatment course, and clinical tests in the last month of treatment have shown the patient to be cured

**Treatment completed** – Patient has completed course of treatment without any evidence of treatment failure, but also no test results to confirm the status as cured

**Treatment failed** – Patient whose clinical tests indicate that the disease has not been cured towards the end of the treatment

**Died** – Patient died during treatment

**Lost to follow-up** – Patient whose treatment was interrupted for a few consecutive months

**Not evaluated** – A patient for whom no treatment outcome is assigned. This includes cases “transferred out” to another treatment unit as well as cases for whom the treatment outcome is unknown

**Treatment regimen changed** – A patient who has been taken off an adherence technology or platform as their regimen has changed
Assigning a treatment outcome (1/2)

Step 1 – Click on the Close Case Tab

Step 2 – Click on Close Case button
Assigning a treatment outcome (2/2)

Step 3 – Select the Treatment Outcome from the list

Step 4 – Click on Submit button
This feature allows you to view comprehensive reports, summary reports and overview based on the filters and data you require.
View 1 & 2 - These sections provide adherence related overview
View 3 – This section provides enrollment timelines
Step 1 - Go to the ‘Reports’ section from the side bar
Step 2 - Select the date range (all time, or a specific range) between which patients were enrolled
Reports

Step 4 - Select Detailed or Summary Report
- Detailed Report
- Summary Report

Step 5 - Select the geographies

Step 6 - Select report type

Step 7 - For a detailed report, select categories of data to be included
Troubleshooting

Do refer to program troubleshooting guides provided in case you face any issues.

Please refer to the FAQs to understand the platform better. The Hub is divided into multiple modules, and questions on each module are answered as a part of the FAQs.

Please write to us about any issues, bugs, feedback or suggestions that you might have about the Hub platform [here](#).
Helpdesk

Welcome! We are happy to support you in any way we can. Please choose the appropriate option below to continue.

Contact us about:

- **Training and Platform usage**: Ask us a question about the Hub
- **System issues or bugs**: Report an issue or bug that you are facing while using the platform
- **Feature request**: Suggest a change or new feature

The helpdesk can be accessed through this link - https://everwellhub.atlassian.net/servicedesk/customer/portal/3

Select the relevant category of your request (Training/queries on usage, issued with the platform and any request for features)
- Select the grey box below ‘What can we help you with?’, and fill the form the follows beneath it.
- Please ensure all the required fields are filled, and submit the form. You will be notified via the e-mail provided on the form.