



**Medly Dashboard**  
**Product Version 3.x**  
**User Manual v4.0**



# Medly Dashboard User Manual

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## Medly

The intended use of **Medly** is to support patients with heart failure. The Medly system consists of a patient-facing application as well as a clinician-facing dashboard.

Medly is intended to help your patient(s) self-manage their heart failure, improve communication between you and your patient(s), and to improve clinical management by monitoring and sharing health information. The data shared with you includes weight, blood pressure, heart rate, symptoms, medication, and/or lab results. Medly interfaces with commercially available blood pressure monitors and weight scales to capture readings. Medly also allows patients to enter readings manually.

Based on personalized goal parameters and an existing treatment plan you have defined, as well as patient-reported symptoms and daily measures, Medly provides automated feedback to your patient(s) to promote self-management. Patients may be told to contact the clinic, reminded to take a medication at a dose already prescribed, or suggest they visit the Emergency Department.

Lets get started!

## Browser Requirements

Medly Dashboard is optimized for the following browser:

- Google Chrome browser v67.x or higher
  - Available at <https://www.google.com/intl/en-CA/chrome/browser/>



Medly Dashboard does not support Internet Explorer 8 (IE8).



### 1. Login to your Account

1. On a hospital-intranet connected web browser, go to the Medly Dashboard URL that was provided by your Medly site coordinator.
2. Log in with your Dashboard user name and password.

Once you are done using Dashboard, you should log out using the Log Out button at the top right of the screen.

## 2. Navigating Medly Dashboard

Once you login to Medly Dashboard, you'll see the Alerts Centre. This is the home page and will provide an overall view of patients that may require attention. From here, you can access all the key features of the app, shown below.

The screenshot shows the Medly Dashboard Alerts Centre. At the top, there is a navigation bar with 'Alerts' and 'Patients' tabs. The 'Alerts' tab is active. In the top right corner, there is a user profile icon labeled 'admin' and a 'Log Out' button. Below the navigation bar, the main content area is titled 'Alerts Centre' and contains the text 'View a list of active alerts and current non-compliant patients below.' Below this, there are two tabs: 'Clinical Alerts' and 'Non-compliant Patients'. The 'Clinical Alerts' tab is selected. Below the tabs, there is a pagination control with 'Previous', '1', '2', '3', '4', and 'Next' buttons. The main content is a table with columns: 'Reviewed', 'Patient', 'Parameters', and 'Time'. The table contains three rows of patient alerts. Callout 1 points to the 'Clinical Alerts' tab, callout 2 points to the 'Reviewed' checkbox in the first row, callout 3 points to the 'Non-compliant Patients' tab, callout 4 points to the 'Patients' tab in the navigation bar, callout 5 points to the 'admin' user profile, and callout 6 points to the 'Log Out' button.

Reviewed	Patient	Parameters	Time
<input type="checkbox"/>	Yates, Ronald 7001317 (416) 134-1393 The Salvation Army Grace Hospital	<b>Measurements:</b> 175 lb, 120/80 mmHg, 80 bpm. <b>Symptoms:</b> More chest pain, More tired. <b>Message:</b> Contact the heart function clinic or your family doctor. Go to the emergency department if you feel you should.	5:48 08 Jan 2019
<input type="checkbox"/>	Smith, John 00000000 (437) 111-2222 Hickle-Hansen	<b>Measurements:</b> 194 lb (high), 183/62 mmHg (high), 86 bpm. <b>Symptoms:</b> Fainted, ICD Fired, Night breathing worsened. <b>Message:</b> Have someone drive you to the emergency department or call 911 now.	07:58 05 Jan 2019
<input type="checkbox"/>	Yates, Ronald 7001317 (416) 134-1393	<b>Measurements:</b> 150 lb, 120/80 mmHg, 66 bpm. <b>Symptoms:</b> Shortness of breath, Light-headed, 2 pillows. <b>Message:</b> If you feel worse later today, record your symptoms with Medly.	09:03 02 Jan 2019

- 1. Clinical Alerts** - Provides a list of all the patients with active alerts
- 2. List of active alerts** - Formatted as a task list; patients that have been reviewed or contacted can be checked off from this list
- 3. Non-compliant Patients** - Provides a list of patients that have not taken all necessary readings within a certain time period so that they can be appropriately contacted
- 4. Patients** - Patients that you have been assigned to as a caregiver can be accessed here; the patient summary can also be accessed from this page
- 5. Profile** - Your account information can be viewed and edited by clicking here
- 6. Log out** - Click here to log out once you are done using Dashboard

## 3. Alerts Centre

The Alerts Centre provides an overall view of all patients on Medly that require attention. This is done through two tabs:

- Clinical Alerts
- Non-compliant Patients

### 3.1 Clinical Alerts

Clinical Alerts are triggered by patients on the Medly applications. Each alert is listed chronologically by default.

The Clinical Alerts table is formatted as a task list. Clinicians are able to check off patients they have already reviewed or contacted. Once an alert is checked off, the text will turn grey and the checked alert will be removed from the Alerts Centre overnight.

Clicking on the alert will take you to the patient’s summary page.

Reviewed	Patient	Parameters	Time
<input type="checkbox"/>	Yates, Ronald 7001317 (416) 134-1393 The Salvation Army Grace Hospital	<b>Measurements:</b> 175 lb, 120/80 mmHg, 80 bpm. <b>Symptoms:</b> More chest pain, More tired. <b>Message:</b> Contact the heart function clinic or your family doctor. Go to the emergency department if you feel you should.	5:48 08 Jan 2019
<input type="checkbox"/>	Smith, John 00000000 (437) 111-2222 Hickle-Hansen	<b>Measurements:</b> 194 lb (high), 183/62 mmHg (high), 86 bpm. <b>Symptoms:</b> Fainted, ICD Fired, Night breathing worsened. <b>Message:</b> Have someone drive you to the emergency department or call 911 now.	07:58 05 Jan 2019
<input type="checkbox"/>	Yates, Ronald 7001317 (416) 134-1393 The Salvation Army Grace Hospital	<b>Measurements:</b> 150 lb, 120/80 mmHg, 66 bpm. <b>Symptoms:</b> Shortness of breath, Light-headed, 2 pillows. <b>Message:</b> If you feel worse later today, record your symptoms with Medly.	09:03 02 Jan 2019
<input type="checkbox"/>	Smith, John 00000000 (437) 111-2222 Hickle-Hansen	<b>Measurements:</b> 140/87 mmHg, 101 bpm. <b>Symptoms:</b> Night breathing worsened, More chest pain, Swollen ankles, Unusual heart beat, 2 pillows. <b>Message:</b> Contact the heart function clinic or your family doctor. Go to the emergency department if you feel you should.	09:49 30 Dec 2018

**CAUTION:** If you are not receiving email alerts, you can still log into Medly Dashboard to view all patient alerts. Contact Medly support if you continue to not receive email alerts.

### 3.2 Non-Compliant Patients

The Medly Dashboard sends automated phone calls to patients if they have not taken all necessary readings within a certain time period (dependant on their conditions). Non-compliant patients are those who receive one or more automated phone calls, and they are displayed in this view below.

The Non-Compliant Patient List helps identify patients who are not following the adherence protocol so that they can be appropriately contacted.

Clinical Alerts		Non-compliant Patients	
Patient	Conditions	Last Call	
Account, Test 123456789 (416) 111-1111 Hickle-Hansen	Congestive Heart Failure	01 Mar 2019	
Smith, Test 778899 (111) 555-6666 Hickle-Hansen	Congestive Heart Failure	01 Mar 2019	

**CAUTION:** Adherence calls will help remind patients to take their daily readings. If adherence calls are disabled or if you'd like to follow up with the patient, please log in to Medly Dashboard to check their status or contact the patient directly.

## 4. Patients

The Patients page displays all patients from who you have been assigned as a caregiver and lets you view all of their Medly data (collected physiological data, symptoms, alerts, medications, test results).

### 4.1 Viewing Patient Summary

Click on the **patient's name** to view the **Patient Summary**.

If the patient has an active alert, it will appear at the top of the patient page.

The patient's information from the last 3 months will be displayed on the graphs and tables of the Summary page. This may include Weight, Blood pressure, Pulse, Symptoms, Steps and/or Blood Glucose. The exact parameters displayed on this page depends on the patient's conditions. The patient's lab results, medications, care team, demographic information, and alert history are also accessible from the Patient Summary.



Alerts Patients

admin Log Out

## John Smith

Clinic: Hickle-Hansen  
MRN: 00000000  
Sex: male  
Age: 51  
Primary Phone: (437) 111-2222  
Additional Info: n/a

Active alerts

Links to more information

07:58 05 Jan 2019 Measurements: 194 lb (high), 183/62 mmHg (high), 86 bpm. Symptoms: Fainted, ICD Fired, Night breathing worsened. Message: Have someone drive you to the emergency department or call 911 now.

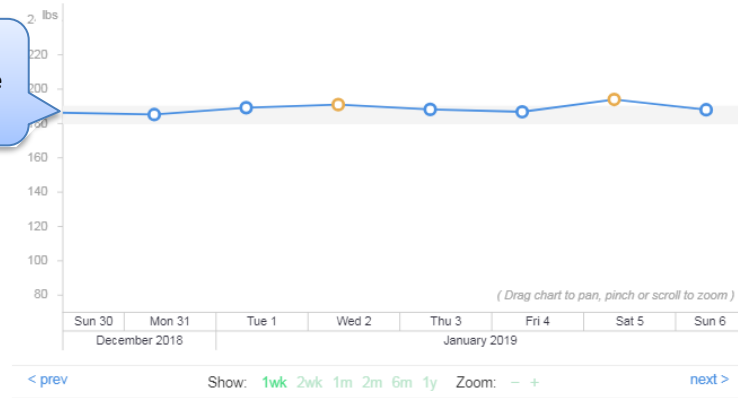
Displays data associated with information in view

Normal ranges are indicated

Summary Medication Profile Test Results Care Team History Alerts

Weight Blood Pressure Pulse Symptoms

### Weight



More Info Data Table

Displayed Date Range	Dec 30, 2018 to Jan 6, 2019
Average Weight	188.9 lbs
Normal Range	180-190 lbs
Out of Range Readings	2
Total Readings	7

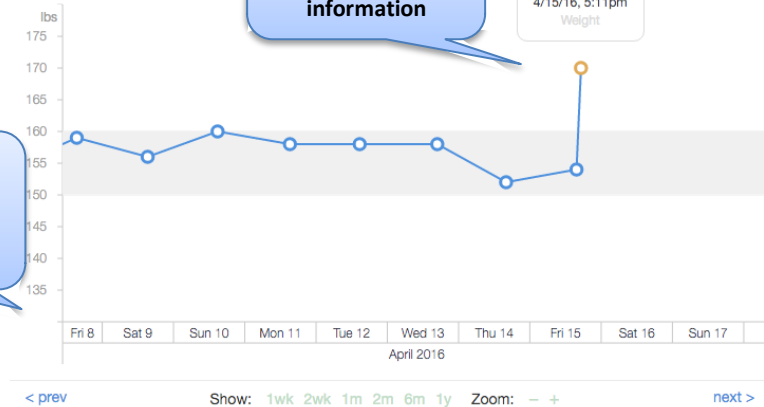
Data is calculated from only data points visible on the screen. Data shown are limited to the last 3 months.

Select/hover on data point to display additional information

Click to view the graph in table form

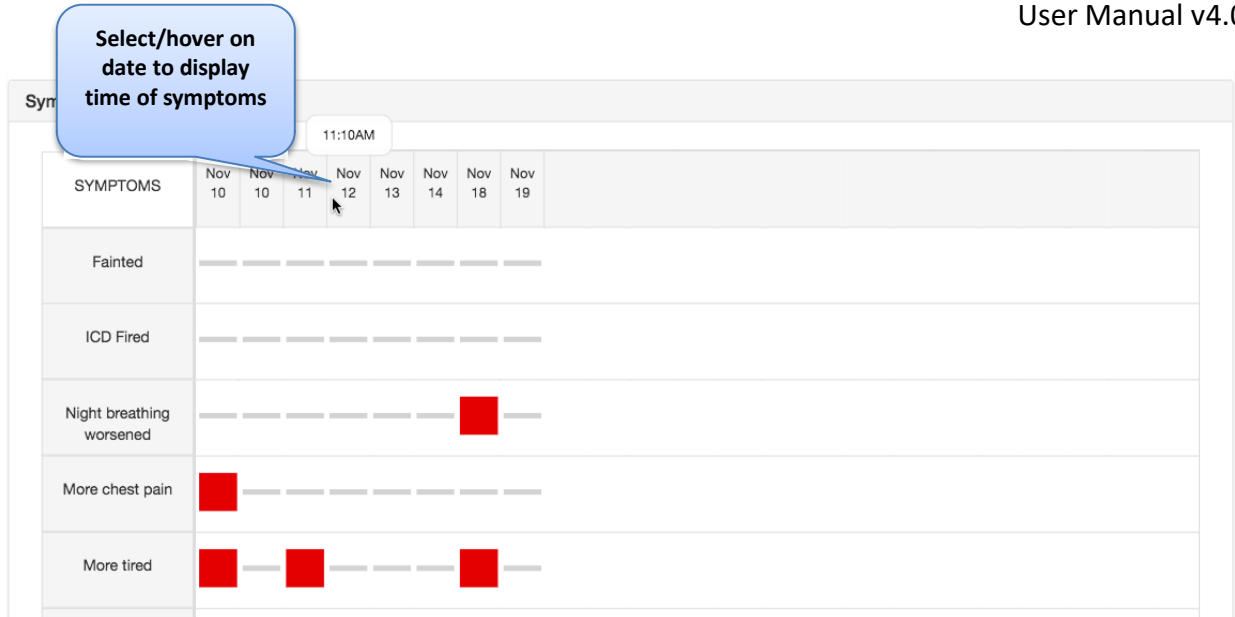
Scroll and zoom in graphs to view historical data

### Weight



More Info Data Table

DATE	WEIGHT (lbs)
Apr 15, 2016 5:11 PM	170
Apr 15, 2016 3:41 PM	154
Apr 14, 2016 3:58 PM	152
Apr 13, 2016 4:48 PM	158
Apr 12, 2016 2:41 PM	158
Apr 11, 2016	158



**CAUTION:** Readings and alerts will only appear in Medly Dashboard after patients have completed their readings and sent their data. If you still suspect there are incorrect or missing data, or incorrect messages in Medly Dashboard, please contact Medly Support.

#### 4.1.1 Medication

Click on the **Medication** tab under the patient’s page.

The date and time the list was updated is displayed at the top of the page. The patient medication list includes baseline medication instructions and any additional information.

For defining medication instructions that are part of alert messages, see section 5.1.1.

Summary Medication Profile Test Results Care Team History Alerts

### Medication

The following medication list is up to date as of November 22 2017 at 10:31 AM.

[Add New CHF Medication](#)

Medication	Instructions	Additional Information
Tylenol Acetaminophen Oral	50 mg Twice daily	Take additional as needed <a href="#">Edit</a>
Coversyl Perindopril Oral	8 mg Once daily	<a href="#">Edit</a>



#### 4.1.1.1 Adding Medication

Medly Dashboard allows clinicians to track the patient’s medication.

1. In the Medication tab under the patient’s page click on the **Add New** button for the respective medication type.
2. Enter the required fields in the pop-up window and follow the instructions.

Test CHF Patient - MRN: 5849385

Medication 1 -- 2 Review

**Medication**

Generic Name\*

Brand Name

Method

**Instructions**

Dose

Dose Units

Frequency

Additional Information

Missing required fields

Cancel Verify

#### 4.1.1.2 Viewing, Editing or Deleting a Medication

1. If you would like to delete a medication or change the details of the medication you have saved, click on the **“Edit”** button beside the medication and make the changes you want in the pop-up window.
2. If the patient is no longer taking the medication and you would like to delete it from the Medication list, press the **“Delete”** button.

**Note:** If you delete a medication, you will not be able to retrieve the information at a later time.

Medication			
Medication	Instructions	Additional Information	
Furosemide Lasix	2 mcg twice a day	in the morning	Edit

## 4.1.2 Test Results

### 4.1.2.1 Viewing and Adding Patient Tests

Patient test results are pulled automatically from the UHN Non-Operational Data Repository (NODR) every 12 hours or entered in manually.

To add new test results manually:

1. Click on the **Test Results** tab under the patient's page.
2. Click on the **Add New** button.
3. Enter the required fields in the pop-up window and follow the instructions.

Test CHF Patient - MRN: 5849385

Test Results Review

1 -- 2

**Patient Test Results**

Collection Date \*

Labs

Potassium (mmol/L)

Creatinine (µmol/L)

Hemoglobin (g/L)

Sodium (mmol/L)

BNP (pg/mL)

Cancel Verify

### 4.1.3 Patient Care Team

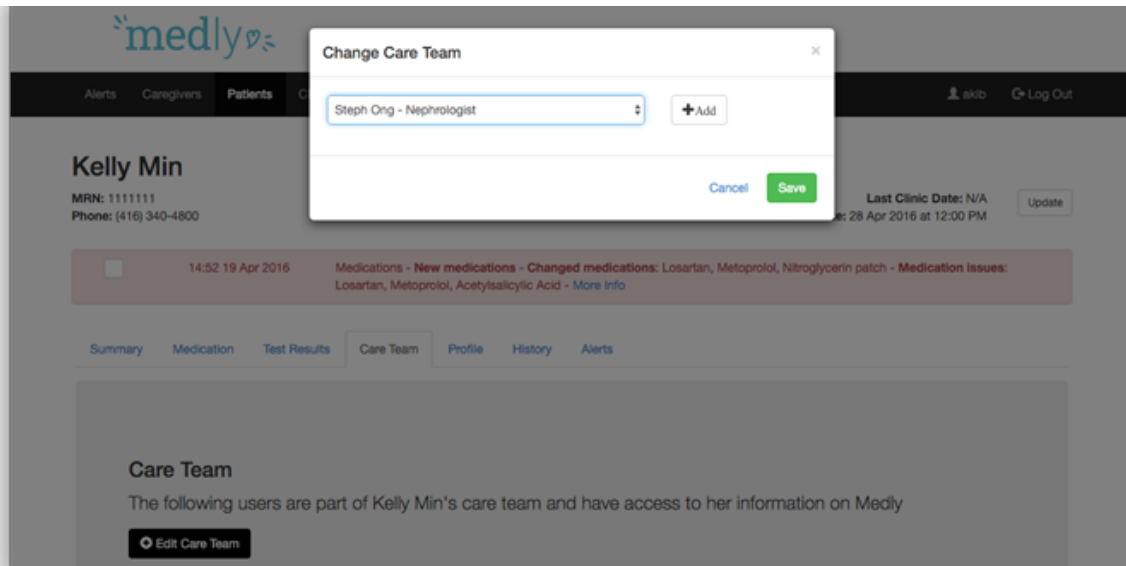
The Patient Care Team includes all the caregivers who are linked to that patient's care. Caregivers represent the clinician users of Medly Dashboard. Clinicians need to be linked with a patient in order to access their information and receive any associated alerts; this is done by adding their caregiver account to the patient's care team.

1. Click on the **Care Team** tab under the patient's page to display the members of the patient's care team.
2. To modify the care team (add or delete), click on the **Edit Care Team** button (Administrators only).
3. To add a care team member, select a caregiver from the dropdown list and click **Add**.

**Note:** If the caregiver is not in the dropdown menu, please add them to the caregiver list (see instructions in Section 5.1).

4. To remove a care team member, click the **X** beside the caregiver you wish to remove.
5. Once you are ready, click **Save**.

**Note:** Caregivers are displayed in the order they were added to the care team.



#### 4.1.4 Dismissing Alerts

Alerts can be triggered when a patient's data indicates that they may be experiencing worsening readings or symptoms, e.g. high blood pressure.

When this occurs, the patient's page will show an alert at the top of the page.

1. To dismiss an alert, click the checkbox beside the alert. The alert will grey out. At the end of the day, all dismissed alerts will be removed from the page.
2. To view the full history of Alerts, click on the Alerts tab on the patient's page. On this page you can see the full history of the alerts that have been triggered for the patient.

## David E Johnson

Clinic: Bayer Group  
MRN: 7005075  
Sex: male  
Age: 54  
Primary Phone: 416-555-1234  
Additional Info: n/a

<input type="checkbox"/>	10:37 05 Oct 2017	<b>Measurements:</b> 135lbs, 150/80mmHg, 110bpm, <b>Symptoms:</b> Fainted, Night breathing worsened, More chest pain, Shortness of breath, 2 pillows, <b>Message:</b> "Have someone drive you to the emergency department or call 911 now."
<input checked="" type="checkbox"/>	10:10 05 Oct 2017	<b>Measurements:</b> <b>Symptoms:</b> Fainted, More chest pain, Shortness of breath, Reduced activities, <b>Message:</b> "Have someone drive you to the emergency department or call 911 now."
<input type="checkbox"/>	09:55 05 Oct 2017	<b>Measurements:</b> 131.4lbs, 106/92mmHg, 72bpm, <b>Symptoms:</b> Fainted, ICD Fired, Night breathing worsened, More chest pain, More tired, Shortness of breath, Swollen ankles, Unusual heart beat, Light-headed, 2 pillows, <b>Message:</b> "Have someone drive you to the emergency department or call 911 now."

Summary Medication Test Results Care Team Profile History Alerts

### Alerts

The following alerts have been generated for this patient

#### Patient Alerts

Date	Time	Note
06 Oct 2017	09:19	<b>Measurements:</b> 151lbs (high), 120/90mmHg, 90bpm, <b>Message:</b> "Contact the heart function clinic or your family doctor. Go to the emergency department if you feel you should."
05 Oct 2017	10:37	<b>Measurements:</b> 135lbs, 150/80mmHg, 110bpm, <b>Symptoms:</b> Fainted, Night breathing worsened, More chest pain, Shortness of breath, 2 pillows, <b>Message:</b> "Have someone drive you to the emergency department or call 911 now."

## 5. Administrative Tasks

Some administrative tasks can only be completed when logged into Medly Dashboard as an administrator or super administrator.

### 5.1 Add a New Account (Administrators only)

To add a new patient, caregiver, clinic, or administrator (super administrator only), click on the **Add New** button under each of the respective sections (e.g. click Add New Patient when you are in the Patients section to add a new patient). Fill in the information in the pop-up window. Required fields are marked with a red asterisk (\*).

#### 5.1.1 Patients

When creating a new patient, note that:

- The patient's email information is used for reference only. They will not receive any automated email communications.

- The patient username and password is used to sync data from the Medly mobile applications with the Medly Dashboard.
- Parameters can be customized for each patient, which will determine how the alerts are generated for the patient in the Medly mobile application. For example, checking off “Patient takes medication on weight gain” and completing the associated field will enable medication on weight gain alerts for the patient.

### 5.1.2 Caregivers

As an Administrator, you can view all caregivers and manage their accounts.

When creating a new caregiver:

- The email saved for the caregiver is where they will receive any relevant patient-related emails and alerts; please enter a valid UHN email address
- The new username must not already exist in the system

### 5.1.3 Clinics

This page provides a list of the clinics involved with Medly. Clinic information will be pushed to the patient including the clinic phone number.

### 5.1.4 Manage Administrators (Super Administrators only)

Only Super Administrators have the ability to manage Medly Dashboard administrators. This is done through the Administrators page.

**Note:** Administrators can view, create and edit all caregiver and patient accounts on Medly Dashboard.

## 5.2 Edit Profiles

Profiles can be edited by clicking the **Patient’s name**, **Username**, and **Caregiver’s name** (administrators only). You will be directed to a profile page where you can **Edit** information.

**Note:** For patients, you must click on the **Profile** tab under the patient’s page to view the patient profile.



The screenshot shows a form titled "Information" with three input fields: "MRN:" containing "9999999", "Title:", and "First Name:" containing "John". An "Edit" button is located in the top right corner of the form, highlighted with a red box.

## 6. Privacy

Please refer to UHN’s [Privacy Policy and Procedure Manual](#).

## 7. Support

If you have any questions or comments, or you are having trouble with Medly Dashboard, please let us know!

**You can contact us here:**

Support email: [medlysupport@ehealthinnovation.org](mailto:medlysupport@ehealthinnovation.org)

Support phone number: 437-226-8093