



Medly Dashboard
Product Version 3.x
User Manual v5.0



Medly Dashboard User Manual

Table of Contents

- Medly3**
- Browser Requirements.....3**
- 1. Login to your Account.....3**
- 2. Navigating Medly Dashboard4**
- 3. Alerts Centre.....5**
 - 3.1 Clinical Alerts5**
 - 3.2 Non-Compliant Patients6**
- 4. Patients.....7**
 - 4.1 Viewing Patient Summary7**
 - 4.1.1 Medication9
 - 4.1.2 Test Results10
 - 4.1.3 Patient Care Team.....11
 - 4.1.4 Dismissing Alerts12
- 5. Administrative Tasks13**
 - 5.1 Add a New Account (Administrators only)13**
 - 5.1.1 Patients.....14
 - 5.1.2 Caregivers14
 - 5.1.3 Clinics.....14
 - 5.1.4 Manage Administrators (Super Administrators only).....14
 - 5.2 Edit Profiles14**
- 6. Privacy15**
- 7. Support.....15**

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 v77.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 interface. At the top, there is a navigation bar with 'Alerts' and 'Patients' tabs. The 'Alerts' tab is active, and a callout '5' points to it. To the right of the navigation bar, there is a user profile 'admin' and a 'Log Out' button, with callouts '6' and '7' pointing to them respectively. Below the navigation bar is the 'Alerts Centre' section, which 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 active, and a callout '1' points to it. Below the tabs is a table of alerts. The table has columns: 'Status', 'Patient', 'Urgency', 'Parameters', and 'Time'. The first row shows an alert for 'Smith, John' with a status of 'To Do' and a time of '15:50 06 Nov 2019'. The second row shows an alert for 'Smith, Jane' with a status of 'In Progress' (marked with a red exclamation mark icon) and a time of '15:44 06 Nov 2019'. The third row shows an alert for 'Smith, Jim' with a status of 'To Do' and a time of '15:22 06 Nov 2019'. Callout '2' points to the 'Status' column, callout '3' points to the 'Non-compliant Patients' tab, and callout '4' points to the red exclamation mark icon in the 'Urgency' column of the second row. At the bottom right of the table, there is a pagination control with 'Previous', '1', '2', '3', and 'Next' buttons.

- 1. Clinical Alerts** - Provides a list of all the patients with active alerts
- 2. List of active alerts** - Formatted as a task list; alerts can be marked 'To Do', 'In Progress', or 'Reviewed' to denote current review status
- 3. Non-compliant Patients** - Provides a list of patients that have not taken a full set of readings within a certain time period so that they can be appropriately contacted
- 4. Urgency Flag** - A visual indicator denoting red state alerts
- 5. Patients** - A list of patients that you have been assigned to as a caregiver; the patient summary can also be accessed from this page
- 6. Profile** - Your account information can be viewed and edited by clicking here
- 7. 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 mark alerts based on their current review status as either 'To Do', 'In Progress', or 'Reviewed'. Once an alert is marked 'Reviewed', the text will turn grey and the reviewed alert will be removed from the Alerts Centre overnight.

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

Clinical Alerts

Non-compliant Patients

Previous

1

2

3

Next

Status	Patient	Urgency	Parameters	Time
To Do	Smith, John 1223423 (111) 111-1111 Hickle-Hansen		Measurements: 120/80 mmHg, 90 bpm. Symptoms: More tired, Shortness of breath, Swollen ankles, Unusual heart beat, Light-headed, Reduced activities, 2 pillows. Message: If you feel worse later today, record your symptoms with Medly.	15:50 06 Nov 2019
Reviewed	Smith, Jane 1223423 (111) 111-1111 Hickle-Hansen	!	Measurements: 70/40 mmHg (low), 9 bpm (abnormal). Symptoms: Fainted, Night breathing worsened, More chest pain, More tired, Shortness of breath, Swollen ankles, Unusual heart beat, Light-headed, Reduced activities, 2 pillows. Message: Have someone drive you to the emergency department or call 911 now.	15:44 06 Nov 2019
In Progress	Smith, Jim 7007521 (234) 234-2342 Bayer Group		Measurements: 110/70 mmHg, 75 bpm. Symptoms: More tired. Message: If you feel worse later today, record your symptoms with Medly.	15:22 06 Nov 2019
To Do	Smith, Joan 06 (647) 773-2410 Toronto General Hospital	!	Measurements: 120/80 mmHg, 90 bpm. Symptoms: Fainted, Night breathing worsened, More chest pain, More tired, Shortness of breath, Swollen ankles, Unusual heart beat, Light-headed, Reduced activities, 2 pillows. Message: Have someone drive you to the emergency department or call 911 now.	09:31 06 Nov 2019
In Progress	Smith, James 06 (416) 817-3343 Bayer Group		Measurements: 150 lb, 120/80 mmHg, 90 bpm. Symptoms: More tired, Shortness of breath. Message: If you feel worse later today, record your symptoms with Medly.	08:50 06 Nov 2019

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. Non-compliance is defined as the lack of a full morning set of readings completed by the patient and received by Medly Dashboard by 10am ET.

The Non-Compliant Patients tab lists all patients who were non-compliant as of 10 am ET that day. The list helps identify patients who are not following the adherence protocol so that they can be appropriately contacted. It displays the timestamp of the Last Feedback Message (i.e., the last time the patient entered a complete set of readings to receive any Medly feedback message, whether normal or an alert) as well as the timestamp of the last call (i.e., the last time the patient received an automated phone call for non-compliance).

The list is sorted by oldest Last Feedback Message. Patients who have no prior feedback messages will appear at the end of the list.

Clinical Alerts		Non-compliant Patients	
Patient		Last Feedback Message	Last Call
SmithTwo, Donald 123123 (111) 555-6666 Toronto General Hospital		10:48 12 Sep 2019	10:00 08 Nov 2019
PatientTwo, Sample 11 (123) 456-7890 Test Clinic		10:48 12 Sep 2019	10:00 08 Nov 2019
Power, Max 123456 (647) 123-4567 Bayer Group		13:55 13 Sep 2019	10:00 08 Nov 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 for which you have been assigned as a caregiver and lets you view all of their Medly data (collected physiological data, symptoms, alerts, medications, test results), as well as progress notes.

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 will be displayed on the graphs and tables of the Summary page. This may include weight, blood pressure, pulse, symptoms, and steps. The patient's progress notes, medications, demographic information (profile), lab results, care team, history, and alerts are also available to view.



Jim Smith
Clinic: Bayer Group
MRN: 7007521
Sex: male
Age: 65
Primary Phone: ()

Alert Status Indicator

Active alerts

Status	Time	Details
In Progress	15:22 06 Nov 2019	Measurements: 110/70 mmHg, 75 bpm. Symptoms: More tired. Message: If you feel worse later today, record your symptoms with Medly.
	14:59 04 Nov 2019	Measurements: 100/80 mmHg, 120 bpm (abnormal). Symptoms: none. Message: If you feel worse later today, record your symptoms with Medly.

Links to more information

Summary | Medication | Profile | Test Results | Care Team | History | Alerts

Progress Notes | Weight | Symptoms

Editable Patient Progress Notes

Disclaimer: Information should be used for reference only and NOT for official clinical documentation.

No progress note recorded.

Edit



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.

The screenshot shows the 'Medication' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'Medication' with a subtitle stating 'The following medication list is up to date as of November 22 2017 at 10:31 AM.' Below this subtitle is a button labeled 'Add New CHF Medication'. Below the button is a table with three columns: 'Medication', 'Instructions', and 'Additional Information'. The table contains two rows of medication data, each with an 'Edit' button to its right.

Medication	Instructions	Additional Information
Tylenol Acetaminophen Oral	50 mg Twice daily	Take additional as needed
Coversyl Perindopril Oral	8 mg Once daily	

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.

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: . History of edits to medications are tracked in the patient’s history tab. However, if you delete a medication, you will not be able to restore 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 hour 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.

4.1.3 Patient Care Team

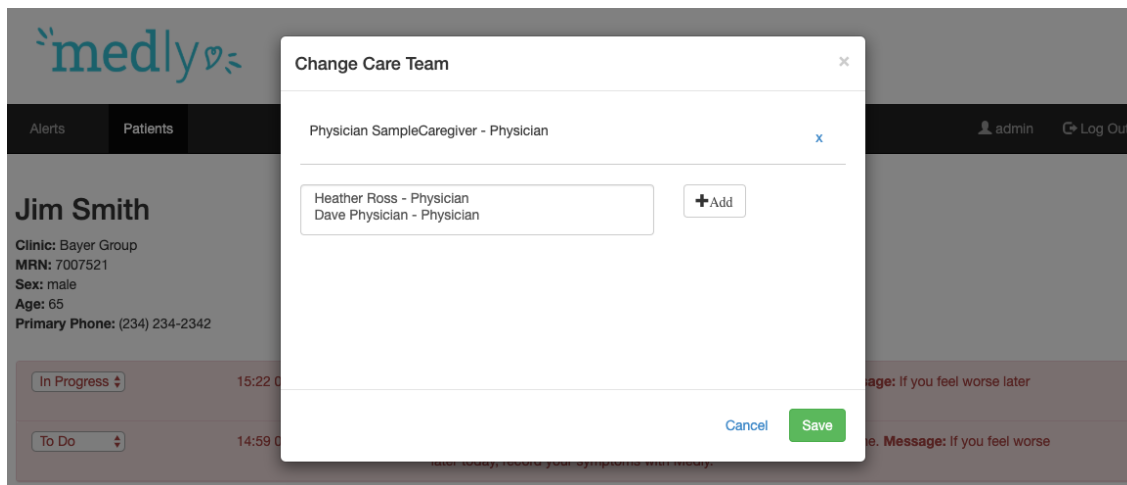
The Patient Care Team includes all the caregivers who are linked to that patient's care. Caregivers represent the clinician users of Medly Dashboard. Clinicians need to be linked with a patient in order to access their information and receive any associated alerts.

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, the caregiver needs to be provided a user account (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 status dropdown and select 'Reviewed'. The alert will grey out. At the end of the day, all reviewed 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.

Sample Patient

Clinic: Hickie-Hansen
MRN: 1223423
Sex: male
Age: 119
Primary Phone: (111) 111-1111

To Do	15:50 06 Nov 2019	Measurements: 120/80 mmHg, 90 bpm. Symptoms: More tired, Shortness of breath, Swollen ankles, Unusual heart beat, Light-headed, Reduced activities, 2 pillows. Message: If you feel worse later today, record your symptoms with Medly.
Reviewed	15:44 06 Nov 2019	Measurements: 70/40 mmHg (low), 9 bpm (abnormal). Symptoms: Fainted, Night breathing worsened, More chest pain, More tired, Shortness of breath, Swollen ankles, Unusual heart beat, Light-headed, Reduced activities, 2 pillows. Message: Have someone drive you to the emergency department or call 911 now.
To Do	07:41 06 Nov 2019	Measurements: 80 lb (low), 65/20 mmHg (low), 30 bpm (abnormal). Symptoms: none. Message: Contact the heart function clinic or your family doctor.

Summary Medication Profile Test Results Care Team History Alerts

Alerts

The following alerts have been generated for this patient

Patient Alerts			
Date	Time	Urgency	Note
06 Nov 2019	15:50		Measurements: 120/80 mmHg, 90 bpm. Symptoms: More tired, Shortness of breath, Swollen ankles, Unusual heart beat, Light-headed, Reduced activities, 2 pillows. Message: If you feel worse later today, record your symptoms with Medly.
06 Nov 2019	15:44		Measurements: 70/40 mmHg (low), 9 bpm (abnormal). Symptoms: Fainted, Night breathing worsened, More chest pain, More tired, Shortness of breath, Swollen ankles, Unusual heart beat, Light-headed, Reduced activities, 2 pillows. Message: Have someone drive you to the emergency department or call 911 now.
06 Nov 2019	07:41		Measurements: 80 lb (low), 65/20 mmHg (low), 30 bpm (abnormal). Symptoms: none. Message: Contact the heart function clinic or your family doctor.

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 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 to the right of the MRN field and is highlighted with a red rectangle.

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

Support phone number: 437-226-8093