



PATIENT RECORD

Overview

The **Patient Record** feature acts as a centralized hub for healthcare professionals, offering streamlined access to comprehensive patient information. By consolidating all aspects of a patient's healthcare journey in one place, this system enhances decision-making and supports coordinated, team-based care. Its design ensures up-to-date record-keeping, effective tracking of patient progress, and immediate access to critical information, which is essential for delivering continuous, well-informed care.

Key features

- General Information: Patient demographics and basic details
- Health Metrics & Questionnaire Results: Track key health indicators
- Alerts & Care Pathways: View active alerts and ongoing care plans
- Appointments: Access history and schedule future visits
- Medical Conditions: Current diagnoses and health status
- File Management: Store and organize patient-related documents
- Notes: Record notes from practitioners and patients

The screenshot displays the 'Patients list' interface. On the left is a blue sidebar with icons for home, calendar, patients, messages, groups, clock, settings, and a plus sign. The main area shows a list of patients. Annotations with red boxes and numbers are as follows:

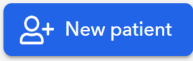
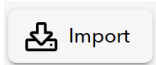
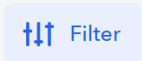
- 1**: Points to the 'Patients' icon in the sidebar.
- 2**: Points to the 'Filter' button in the top search bar.
- 3**: Points to the 'New patient' button in the top right.
- 4**: Points to the 'Import' button in the top right.
- 5**: Points to the three-dot menu icon next to the 'Maëlle Patient' entry.

The patient list includes entries like 'Johny Boll' (17 weeks, Active yesterday), 'Did Panas Adidas 228' (1 days, Invited), 'Test new delete' (1 weeks, Invited), 'Maëlle Patient' (28 years old, Active yesterday), and 'Test resend message' (1 weeks, Invited). Each entry shows various health metrics and status indicators. At the bottom, it shows 'Total users: 74' and 'Rows per page: 5'.



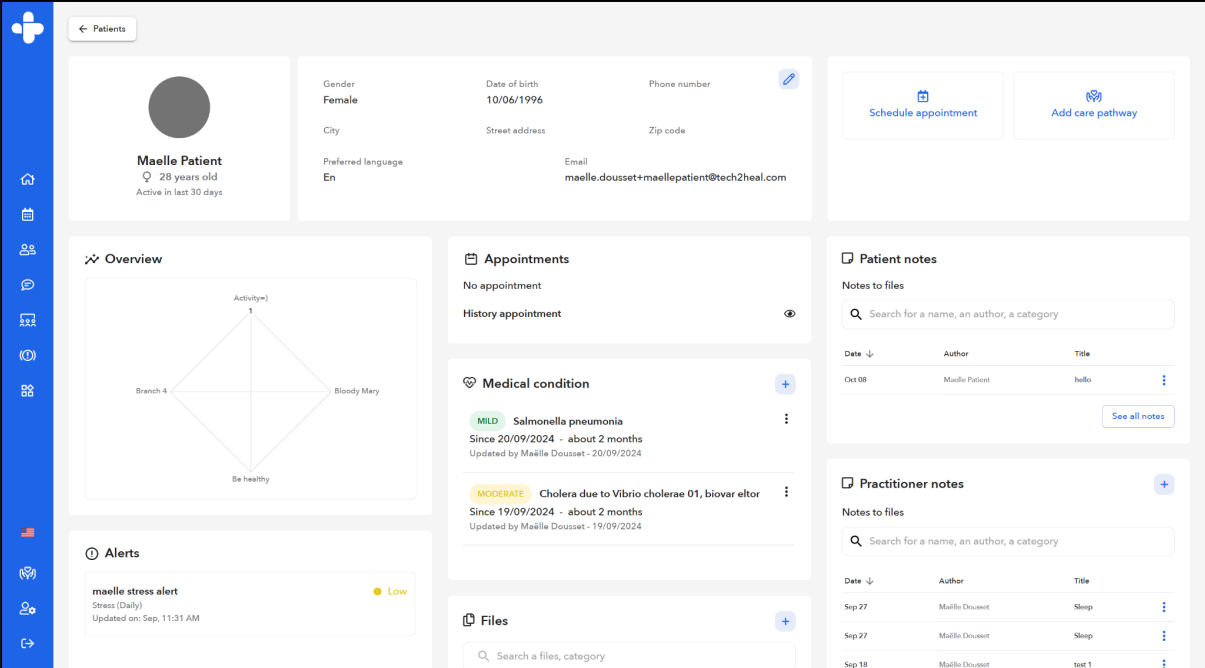
Patient record - User guide

1.1. Patient list

- To manage and open the patient list, click on  on the navigation banner.
- **Add or import new patients** to your list, by clicking on  and fill in the required information.
- The new patient will receive an invitation by email to log in on the mobile app.
- **Import a patient list** from external sources by clicking on . Use an existing **CSV file** or use our CSV template.
- **Filter patients**, by clicking on . Only patients responding to specific characteristics will be displayed in the list.

1.2. Manage a patient record

- Access to a specific patient record by selecting the patient name from your patient list.



The screenshot displays the patient record for 'Maelle Patient', a 28-year-old female. The interface includes a navigation sidebar on the left with icons for home, calendar, patients, messages, and settings. The main content area is divided into several sections:

- Patient Overview:** Displays basic information such as gender (Female), date of birth (10/06/1996), phone number, city, street address, zip code, preferred language (En), and email (maelle.dousset+maellepatient@tech2heal.com). It also features buttons for 'Schedule appointment' and 'Add care pathway'.
- Overview:** A diamond-shaped diagram with vertices labeled 'Activity=1', 'Branch 4', 'Bloody Mary', and 'Be healthy'.
- Alerts:** A section titled 'maelle stress alert' with a 'Low' status and a timestamp 'Updated on: Sep, 11:31 AM'.
- Appointments:** A section titled 'No appointment' with a 'History appointment' link.
- Medical condition:** A section listing two conditions: 'MILD Salmonella pneumonia' (updated 20/09/2024) and 'MODERATE Cholera due to Vibrio cholerae 01, biovar eltor' (updated 19/09/2024).
- Patient notes:** A section titled 'Notes to files' with a search bar and a table of notes. The table has columns for Date, Author, and Title. The first note is dated Oct 08, authored by Maelle Patient, and titled 'hello'.
- Practitioner notes:** A section titled 'Notes to files' with a search bar and a table of notes. The table has columns for Date, Author, and Title. The first note is dated Sep 27, authored by Maelle Dousset, and titled 'Sleep'.
- Files:** A section titled 'Search a files, category' with a search bar.



1.2.1. Patient general information management

- Edit patient information, by clicking on 
- Update contact details, address, emergency contacts, and care team assignments.

1.2.2. Overview chart

- The **overview chart** allows a quick visualization of key patient metrics.
- It is customizable by the organization administrators.
- The different branches represent metrics, scores or subscores from questionnaires. It can have as many branches as needed.
- It displays data from questionnaires and metrics collected through care plans or manually. It only displays data with an established score.

1.2.3. Appointments history

- View upcoming appointments (shown in green)
- Access appointment history, by clicking on 
- Schedule new appointments directly from the patient record, by clicking on **“Schedule appointment”**.

1.2.4. Alerts and care pathways

- **Care Pathways** are structured treatment plans assigned to patients.
- **Add new care pathways** from the patient record, by clicking on **“Add care pathway”** button, or next to the patient name in the patients list. *To learn how to create a care plan go to the [Care Pathway Builder section](#).*
- The patient will receive the notification of the publishing. He'll be able to follow and complete it from his mobile application.
- A patient can follow several care pathways at the same time.
- Track patient progress in current care pathways he is engaged in. See if the patient has completed his care plan or not.
- View, monitor and manage **triggered alerts**.



- Care pathways can trigger alerts depending on how they were set. Alerts depend on the patient's answers.
- Alerts notify healthcare professionals of critical patient information.

1.2.5. Measures

- Monitor metrics, questionnaire scores, and symptoms based on patient responses from their care plan.
- Some questions within the care plan automatically generate metric values or questionnaire scores, which are displayed here.

1.2.5.1. Metrics

- **Add manually a new metric measure**, by clicking on .
- Track metric progress using these indicators:
 -  : Increased value
 -  : Stable value
 -  : Decreased value
- Track metrics trends through **graphical representations**.

1.2.5.2. Questionnaire

- **Manually add questionnaire answers**, during a consultation for exemple, by clicking on . Enter patient responses.
- The other way to have a patient answering a questionnaire is to **include it in a care plan**.
- A **questionnaire score** is assigned to the questionnaire when it is created. The score obtained by the patient will be automatically displayed here.
- If **interpretation rules** were defined during questionnaire setup, scores will be color-coded to indicate risk levels. Risk levels range from 1 (low risk) to 5 (critical risk), based on the patient's score.
- View patient responses in detail by clicking on the questionnaire score.



For further information on setting up interpretation rules or more generally about questionnaires, go to the [Questionnaire section](#).

1.2.6. Medical condition

- **Add a medical condition**, by clicking on 
- Specify condition severity and clinical status
- Update medical conditions, by clicking on 
- Track condition progress
- Archive resolved medical conditions, by clicking on 

1.2.7. Patient medical files

- Access patient files organized in categorical folders (clinical report, labs, patient files, imagery, consent)
- Upload new **medical documents**, by clicking on  or by asking them to upload one when completing their care plan, using the File upload widget.
- Add titles and notes to files for easy reference
- Search for specific files using the search function

1.2.8. Medical notes

- View patient-submitted notes.
- Create a practitioner note by clicking on 
- Edit an existing practitioner notes by clicking on 
- Search through notes using the search function.