

uMed⁺

uMed Platform Guide



Patient approver



Content

1. Introduction.....	2
2. Create account / Login / Reset password / Logout.....	3
Create an account.....	3
Login.....	4
Password reset.....	5
Logout.....	6
3. General uMed platform application elements.....	7
Navigation.....	7
Study menu.....	8
Patient search/filtering and CSV downloading.....	9
Table.....	10
4. Patient approver user flow, step by step.....	11

1. Introduction

This User Guide contains all essential information in order to provide a detailed description of all Patient approver features. The document is divided into three parts:

- Create account / Login / Logout / Reset password
- General uMed platform features
- Patient approver user flow, step by step



2. Create account / Login / Reset password / Logout

Your account will be set up by a Healthcare Provider Manager and your login in details will be sent to your email. You will have 48 hours from receiving the login email to activate your account, after which the activation link will expire and a new link will need to be requested from the uMed team.

Create an account

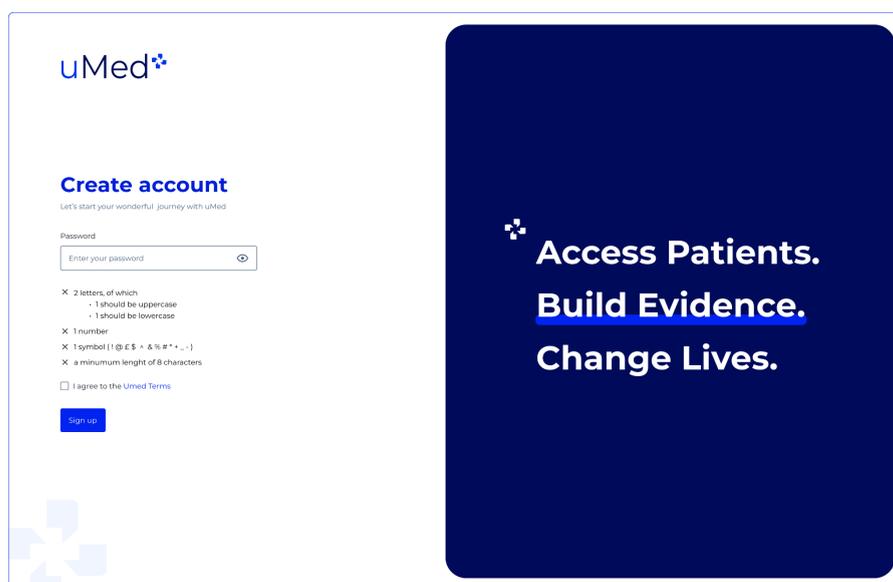
The platform doesn't need to be installed on any of your devices. You can access it from any web browser on your laptop/desktop.

The platform URL is: mystudy.umed.io (this URL can be used after the first login).

This address will also be provided together with your username for the account activation in the first email you receive.

To create an account, follow the steps below:

1. Click on the link you receive in your email.
2. In the Create Account page you must create a password for your account following the minimum requirements detailed on this screen.
3. Click the box to agree to the uMed Terms and Conditions.
4. Click the button **Sign up**.



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Create account

Let's start your wonderful journey with uMed

Password

Enter your password

- X 2 letters, of which
 - 1 should be uppercase
 - 1 should be lowercase
- X 1 number
- X 1 symbol (@ ! \$ % & * + _ -)
- X a minimum length of 8 characters

I agree to the Umed Terms

Sign up

Access Patients.
Build Evidence.
Change Lives.

Login

Each time you log into the platform, you will need to provide:

1. Username/Email address.
2. The password you created during the signup process.

The **Login** button will only become enabled when both fields are filled in.

uMed

Log in to your account
Let's start your wonderful journey with uMed

Username
Enter your email

Password
Enter your password

[Forgot password?](#)

Log in

**Access Patients.
Build Evidence.
Change Lives.**

Password reset

By clicking on the **Forgot password?** link under the **Password** field, you will be redirected to a page where you can request a password reset.

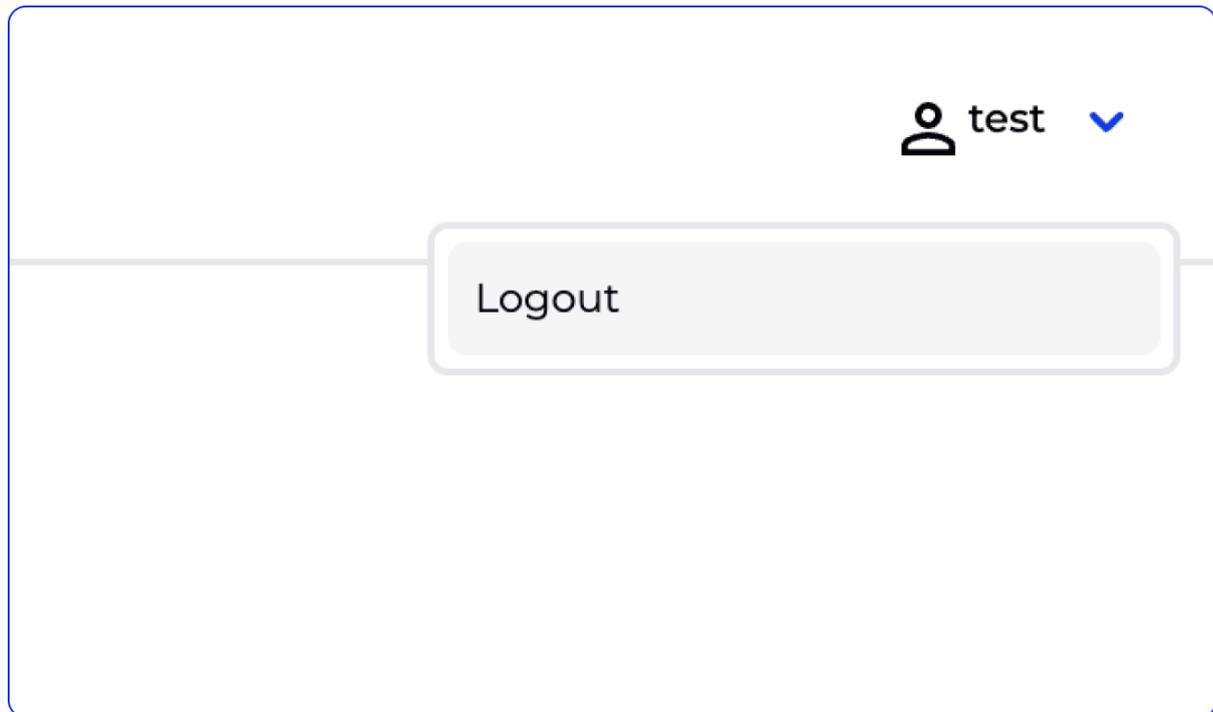
Once you enter your email address and click the button **Reset password**, you will receive an email containing a link to reset your password. Click on the link to start the password reset process.

Next step is to enter a new password which must meet all requirements.

After clicking 'Reset password', you will be redirected to the login page where you can login using the new password that you just created.

Logout

By clicking on your email address in the top right corner of the screen, you will view the dropdown which contains your logout options.



By clicking on the 'Logout' option you will be logged out of the platform and the Login page will be redisplayed.



3. General uMed platform application elements

Navigation

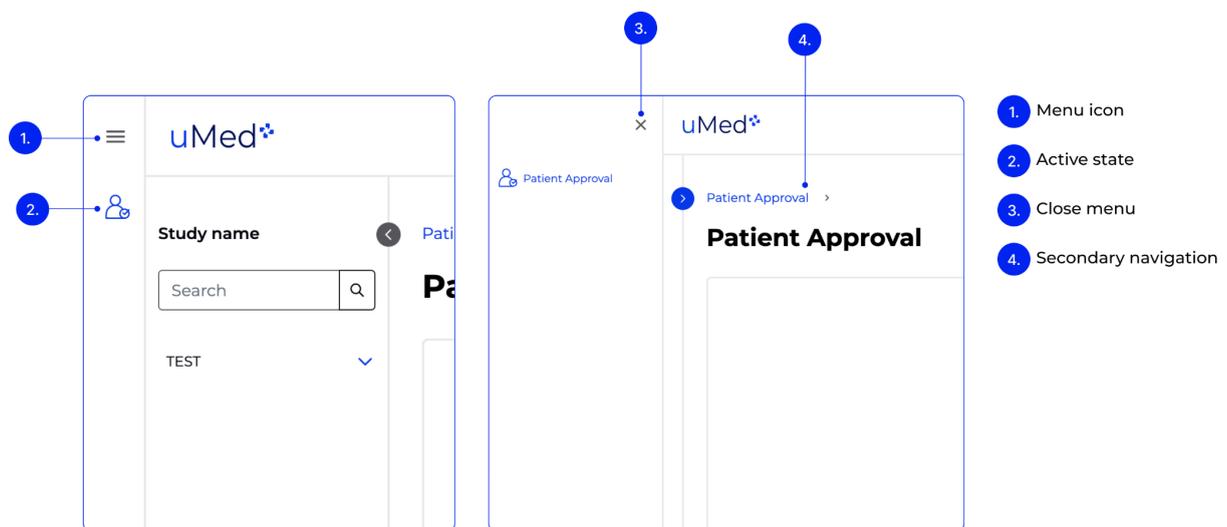
You can navigate through the webpage with:

1. Side menu
2. Secondary navigation
3. uMed logo in the application

1. Side menu - The side menu can have two states: **Open** and **Closed**. If you would like to open the side menu, click on the **Menu icon** (1.) or for closing click on **Close icon** (3.) By clicking on the icon/full name of the feature in the side menu, you can navigate through the platform. When the icon is purple (2.) this indicates which page is active.

2. Secondary navigation(4.) - is a method which also helps you to understand which page you are currently on, and easily click to return to a previous page.

3. uMed logo in application - By clicking on the uMed logo you will be redirected to the platform Home page.

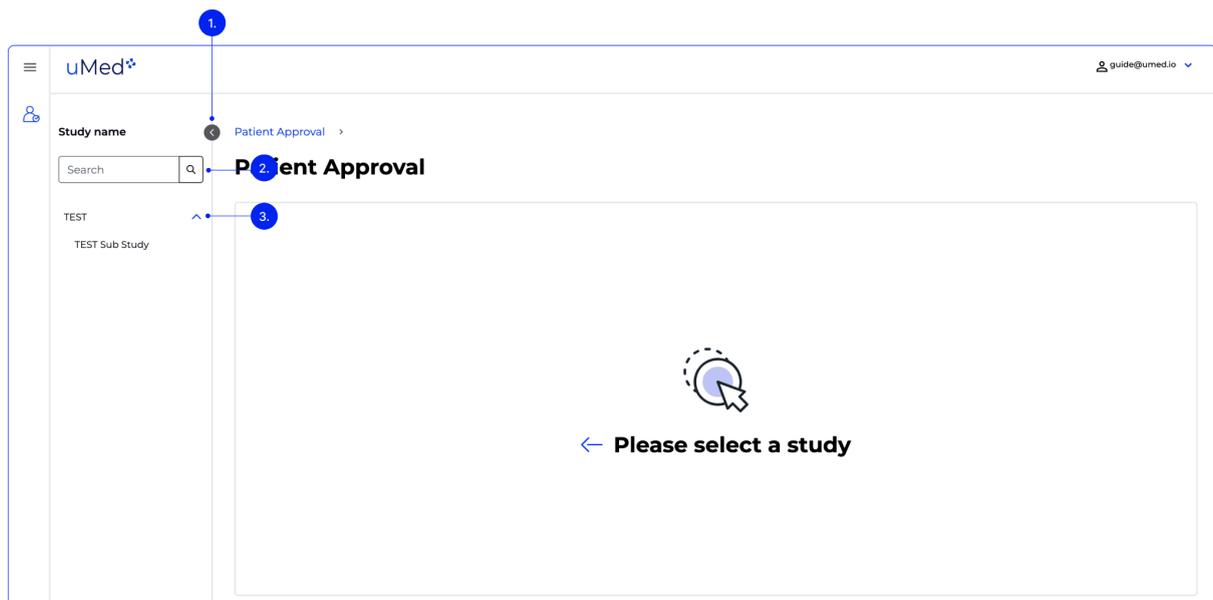


Study menu

Study menu contains a list of studies in which you are involved. By default, the study menu will be expanded, you can collapse it by clicking on the **Collapse/Expand button (1.)**.

If you have a long list of studies, you can use **Study search (2.)** which will help you to find your study faster by entering study name. When you find the study, you click on it to select it and display the patients that uMed has found meeting the search criteria for the selected study.

If the study is a registry which contains a further associated study, the **Down arrow (3.)** will be displayed. By clicking on the arrow the associated study list will be presented. By selecting an associated study, the table will show only patients who belong to this study.



1. Collapse/expand button arrow
2. Study search
3. Study down chevron

Patient search/filtering and CSV downloading

Search - by clicking on the magnify (1.) icon, you see a search bar. By entering the patient search criteria, the system will search for results that match or partially match that criteria. Search can be performed by entering only one of the patient details at a time (e.g. DOB, Last name, etc.) In order to further narrow the list of patients, please use the provided filters which are explained in the next section.

Filter - depends on selected application functionality in the main menu. By clicking on the **Filter** button (2.) a pop up with filtering options will be displayed. Filtered results will be displayed in the table after you input the desired filters and click on the **Apply button**.

Active filters will be shown under the page title, and can be removed by clicking on the **X** button (3.) on one specific filter, or **Clear all button** (4.) to remove all active filters.

Download CSV - this button (5.) will only be active if the table contains patients. Before you download the document, you will have to accept the Data Sharing Policy.

Approve all patients - in case that at least one patient is available for approval,, the **Approve all patients** button will be visible. By clicking the approve button, all patients from the table will be approved.



Search and filters are not applied when approving all patients.

The screenshot shows the 'Patient Approval' interface. At the top, there is a search bar (1), a filter button (2), an 'Approve all 10 patients' button (6), and a 'Download CSV' button (5). Below the search bar, there is a filter remover button (3) and a 'Clear all' button (4). The main content area includes a 'TEST' dropdown, a filter for 'Age: 9 - 32', and a list of patient status tabs: 'About study', 'Ready for approval', 'Approved', 'Engaged', 'Excluded', 'Consented', and 'Randomised'. A 'Customise Columns' button is located on the right side of the table.

1. Patient search
2. Filter button
3. "X" filter remover button
4. Clear all filters button
5. Download CSV button
6. Approve all patients

Table

The table can display the list headings (1.) which filters patients according to the patient status. You can choose what data columns you want to include in the table by clicking on the **Customise column button** (2.), where you can customise some of the displayed patient information in the table. Also, all columns in the table are sortable (3.), but by one, and only one column at a time.

The screenshot shows a table with the following structure:

About study Ready for approval Approved Engaged Excluded Consented Randomised									Customise Columns
<input type="checkbox"/>	uMed Id	Last name	First name	NHS Number	Date of birth	Provider	Cohort group	First engagement	
<input type="checkbox"/>	TEST00000003	Bennett333	Alexander333	7173568748	10.07.1979	GP Surgery	Test1		
<input type="checkbox"/>	TEST00000010	Brown326	Bethan326	1003031397	16.08.1932	GP Surgery	Test1		
<input type="checkbox"/>	TEST00000007	Porter48	Debra48	7666777502	08.03.2004	GP Surgery	Test1		
<input type="checkbox"/>	TEST00000002	Tyler171	Diane171	4720134682	10.09.1951	GP Surgery	Test1		
<input type="checkbox"/>	TEST00000008	Evans246	Gerard246	1169798820	29.05.2001	GP Surgery	Test1		
<input type="checkbox"/>	TEST00000006	Blake350	Helen350	1046001140	12.07.2010	GP Surgery	Test1		
<input type="checkbox"/>	TEST00000004	Newman288	Kenneth288	7110603797	04.12.2003	GP Surgery	Test1		

1. List headings
2. Column customise button
3. Column sort



4. Patient approver user flow, step by step

After choosing the study, the **Ready for approval** tab will be selected by default, after which the table will display all the patients who meet study criteria.

Steps for approving patients:

1. Select (1.) the patients you want to approve or exclude.
2. By selecting at least one patient, **Approve** and **Exclude** buttons (2.) will appear.
3. Click on the **Approve** or **Exclude** (2) button.

After you Approve or Exclude patients, they will move out of the 'Ready for approval' tab based on your decision.

The screenshot shows the 'Patient Approval' interface. At the top right, there are buttons for 'Exclude' and 'Approve'. Below the buttons is a table with columns: uMed Id, Last name, First name, NHS Number, Date of birth, Provider, Cohort group, and First engagement. The table contains six rows of patient data. The first four rows have a green checkmark in the selection column, and the last two rows have an empty checkbox. A legend below the screenshot explains the numbered callouts: 1. Patient selection (pointing to the checkmarks) and 2. Approve/Exclude button (pointing to the 'Approve' button).

uMed Id	Last name	First name	NHS Number	Date of birth	Provider	Cohort group	First engagement
TEST00000003	Bennett333	Alexander333	7173568748	10.07.1979	GP Surgery	Test1	
TEST00000010	Brown326	Bethan326	1003031397	16.08.1932	GP Surgery	Test1	
TEST00000007	Porter48	Debra48	7666777502	08.03.2004	GP Surgery	Test1	
TEST00000002	Tyler171	Dianel171	4720134682	10.09.1951	GP Surgery	Test1	
TEST00000008	Evans246	Gerard246	1169798820	29.05.2001	GP Surgery	Test1	
TEST00000006	Blake350	Helen350	1046001140	12.07.2010	GP Surgery	Test1	

1. Patient selection
2. Approve/Exclude button

Other than the Ready for approval tab you will have **About study**, **Approved**, **Engaged**, **Excluded**, **Consented** and **Randomised** tabs.

About study - contains **Search Methodology** and **Search Criteria** sections which provide more information about the study to help make decisions regarding approving patients.

Approved - contains all patients who currently have approved status and will be engaged for the study.

Engaged - contains all patients that you have previously approved and have been sent an SMS and/or email engagement to participate in the study. Once the patient has completed the survey that has been sent to them, and has either 'consented', or 'not consented' to participate, they will no longer be visible in this list.

Excluded - contains all patients who currently have been excluded and therefore will not be engaged in the study.

Consented - contains all patients who consented to join the study or cohort after they received the screening and consent engagement. They stay in the Consented status all the way through trial site journey.

Randomised - contains any patient who was randomised via trial site screening.

Have a question about the uMed platform?

Please contact us at:

practicesupport@umed.io

