



E-Care @ Home

WP1: Functional Requirements Specification

D1.2.13B: WT 'User Roles': Common
Functional Requirements

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Author(s):	Gus Desbarats,

ABSTRACT
<p>This document describes the various user types and deployment interaction situations the hold different sets of access permissions within WT. The exact permissions assigned to each role will be assigned once the roles are agreed.</p>

KEYWORDS

ECH, WP1, UX specifications, Functional Spec, common, WT

VE	DATE	STATUS, CHANGES	FROM	REVIEW
1.0	03.09.2013	First release	The Alloy	HOAS
2	06.01.2013	Small FFP updates	TheAlloy	WG

1) **Overview:**

The WellTogether (WT) service system, manages multiple communication interactions between users and user classes with different roles determined by affiliations, controls and permissions. This document describes these roles, gives an outline of what functionality is associated with each.

1.1. **Permission classes:**

The main aim of 'roles' is to automatically assign multiple default access permissions to users. The detailed permissions and associated defaults for user classes will be assigned in a separate 'permissions list' document. The main classes referenced in this document are:

1.1.1. **Portal / Browser based functionality limitations (tentative)**

This class of permissions determines what functionality is switched on for any pairing of user and portal. The current plan is to support whether or not the WT UX is achieved through a browser has HW access. The following pairings are planned:

1.1.1.1. **Homepad**

1.1.1.1.1. **Chrome only**

(HW integration switched off)

1.1.1.1.2. **SGW chromium Android HW integration**

1.1.1.1.3. (HW integration on)

1.1.1.2. **Smartphones**

1.1.1.2.1. Portal strategy tba.

1.1.1.3. Other portals

All other portals to have a single functionality set in Chrome.

1.1.2. License access

These control what functionality WT users get in exchange for each payment. For example, CMP 'basic' functionality vs CMP 'with pro-care planning'. License based permissions need to be set at original enrollment and 'service upgrades' need to be accessible in privacy controlled environments. (for example upgrading a homepad from 'basic, to 'paid service' access

1.1.3. Synchronised Functionality access:

These control basic ability to view and change records associated with 'synchronised functionality' between 2 WT users such as 'messages', 'calls' or 'meeting invitations. The main items on this list are:

- 1.1.3.1. **Multimedia messaging**
- 1.1.3.2. **Audio and Video calling**
- 1.1.3.3. **WT-Contact cards**
- 1.1.3.4. **Presence (availability)**
- 1.1.3.5. **Diary entries**
- 1.1.3.6. **Reminders**
- 1.1.3.7. **Internal and external WellTogether invitations**
- 1.1.3.8. **Measures**
- 1.1.3.9. **Data from measures**
- 1.1.3.10. **Permissions**
- 1.1.3.11. **Alerts**
- 1.1.3.12. **Service user profile records**
- 1.1.3.13. **WellTogether Formatted multi-media Information**
- 1.1.3.14. **Device status**
- 1.1.3.15. **Device settings**
- 1.1.3.16. **Remote screen access**

1.1.3.17. **Notes** (consider deleting, add 'send as a message' functionality)

1.1.4. **Viewing access**

These permissions enable one WT user to see the WT service user's record of another user. Typical examples: data from measures, diary (blind-busy/not busy) diary (full) Notes

1.1.5. **Agency access**

These permissions allow one WT user to contact a 3rd party 'on behalf of 'an HP service user. Example: paying for a service bought by a WT service user, from a FF portal, or

2) **Permission types.**

For control access simplicity and efficiency, permission controls should be grouped into types. Individual controls will still be required, but full permission lists should be grouped and managed under these group headings:

2.1. Communications

This refers to calls and messages functionality

2.2. Diary

This refers to scheduled events and reminder functionality

2.3. Group organisation

This refers to setting up and managing groups within contacts

2.4. Wellness

This refers to selection of measures and access to data, for individuals or across care circles.

2.5. Alerts

This refers to all functionality associated with setting up and receiving alerts

2.6. Money

This refers to all functionality associated with managing and spending money

2.7. Identity

This refers to all functionality associated with managing the Identity part of the core service user record.

2.8. Care plan

This refers to setting up and accessing the care plans of individual service users.

2.9. Remote Device Access

This refers to remote access to Homepad functionality other than those items mentioned elsewhere in this section

2.10. Agency

This refers to the right to communicate with, trade with, direct etc.. 3rd parties on behalf of a Service user.

2.11. Service delivery

This refers to selected access permission packages associated with service relationships for example diary access, payment collection etc..

3) Service user roles

3.1. Basic (fixed fee)

A Basic user has paid for a Homepad, but not taken out a service contract.

Basic users will have comms functionality, but not the ability to build up large personal data records e.g. Photos or Wellness trend tracking.

Basic users will need to be hosted and their hosting will need to be bought and paid for on a monthly basis.

Basic users will be 'given' 3 years free usage. At the end of 3 years a fixed upgrade fee will be charged.

Functionality limits will be documented where relevant in the functional specifications

The database structure needs to allow for a 'basic restricted access' profile.

As default, all functionality that requires more than transient storage should not be provided to basic users.

Main exceptions: contacts, diaries and messages. These will require specific usage caps so a small maximum number of messages can be kept at any time.

3.2. Paying service.

Unless specifically stated otherwise, Paying service users will be able to access all the functionality described. Fair usage limits will need to apply. The data base needs to measure total storage capacity – and warn / prompt service upgrade if limits exceeded.

3.3. Premium consumer service

In specific instances, additional services will be provided. These will be 'sold' from various locations in the WT UX: e.g. the services page, the 'private' page. Instances will be specified where relevant.

3.4. Enrolled in a professional care scheme

At any stage, a service user can enter into an arrangement for professional care. When this happens, the care book option will appear and specific permissions will be given to individuals associated with that relationship.

4) Friends and Family Portal users

4.1. License status options:

4.1.1. 'guest' user

An invited FFP user who has downloaded the FFP for free is a 'guest' user. They have a unique WT user ID but have a minimal hosted capacity. Most FFP functionality related to accessing the service records or other paid WT users.

4.1.2. Paid user

It shall be possible to upgrade FFP access to act as a paid user which will allow the user to make extra connections – hold data etc..

4.2. Access permission classes

For quick set up, ffp users can be assigned preset roles (the exact permissions for each will be documented in 12.2.9D permission list). Suggested roles are as follows:

4.2.1. **Totally Trusted Agent** (like a life partner or favourite child)

A totally trusted care agent is assigned, by default, the same access permissions as the service user. But the service user, or the TTA can manually remove most permissions at any time. A totally trusted agent can control the permissions of all other users. (question: do we need a legal contract?)

4.2.2. **Trusted carer** (like close family or close friends)

A trusted carer is given, by default, all permissions, except those controlled under the 'private' section of the HP. (money, basic identity) as well as Agency. Missing permissions

e.g money can be added individually. Trusted carers can also be invited to make wellness assessment readings for a service user.

4.2.3. **Authorised care agent** (like a trusted neighbour)

An Authorised care agent is given specific authorisations, relating to a routine or onetime task for example, shopping, or paying for a specific service.

4.2.4. **Contact**

A Contact is assigned the minimum right to send and receive messages and photos. Any permission level can be reduced to this one at any time by the service user or a totally trusted agent.

4.2.5. **Socialising Contact** (like a friend associated with a social group eg. bridge club)

A socialising contact is automatically assigned 'blind' diary viewing rights and the ability to send invitations to group lists.

4.2.6. **'same as' contact**

At any time, any WT user can be given the same permissions profile as another. This will allow easy set up of temporary cover roles etc..

4.2.7. **Care group contact**

Common Permission defaults can be assigned to 'care groups' set up in contacts

5) **CMP users**

Care management portals will be licensed to organisations who will manage their own bespoke

content such as procedures as well as manage access to their service user clients. The organisations will be able to create and assign professional roles at their own discretion

5.1. Super user

Super users will have control over the collective settings and content affecting the entire organisation.

5.2. Admin contact user

Admin contacts will be able to send and receive communications as well as view 'blind' the service user diary. Unless specified otherwise they should also be the default receiver of messages from Service users.

5.3. Lead Professional user

Professional care contacts will be able to customise and 'prescribe' wellness measure and health information, view the patient data from any prescribed measure, hold consultations amend care records etc.

5.4. Supporting Professional user

Supporting professionals will be able to 'assist' in the delivery of care e.g. take readings and view patient data but, unless assigned a lead professional role, will not be able to prescribe measures.

5.5. Care Technician user

Care technician users will be given access to implement care plans set up by Professional users. This will typically involve reading care plans, marking tasks as done, etc. but will not involve access to patient records.

5.6. 'As per role' user

Organisations should be able to customise exact permission profiles for any professional role

they chose to set up in the CMP environment. These permissions would automatically be assigned to anyone assigned a particular role in care.

6) Service portal users

6.1. “in directory” users

Service portal users will have control over how their own profiles appear in the service directory, but won't have any other communication privileges.

6.2. “selected services’ users.

Service portal users who have been selected to appear on a service user splash page will have, by default, 1 to 1 communication permissions with service users. All other permissions will need to be requested.