



# E-Care @ Home

## WP1: Functional Requirements Specification

### D1.2.9: Clinician's Portal

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ABSTRACT
This document describes the functionality of the WellTogether Clinician's portal to be accessed via the UX-layer according to the architecture described by the wireframes, with the presentation style described in 'graphics' and the UX behaviour to be fully specified, where necessary in the WP-2 – UX templates.
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ECH, WP1, UX specifications, Functional Spec, Homepad

VER.	DATE	STATUS, CHANGES	FROM	REVIEW
1.0	20.12.2013	Draft release	Alloy	Internal
2.0	19.05.2014	New Portal spec Draft - Workflow Development, Roles & Key features added	Alloy	Internal
2.1	02.07.2014	Overview, Data and UI Features added	Alloy	SG

## 1 **Overview:**

### 1.1 **Definition**

In the terminology of the WellTogether service system, the Clinician's Portal is the software interaction portal used by professional care management institutions. It runs on a chrome browser and allows both mouse and touch driven control on tablet or PC style devices.

### 1.2 **Scope**

This document describes the functionality of a new Portal within the WellTogether environment, developed for eCH. The Clinician's Portal (CP) requires different functionality to the existing Care Management Portal (CMP), with greater emphasis on communicating with Clients and their Care Circle (Family, Friends etc.) and managing Clients' Wellness. The CMP's assessment-driven workflow to schedule Care Services is not needed for eCH, which in part resulted in the decision to develop a new, simpler portal (CP) rather than adapt the CMP functionality as previously stated in version 1 of this document.

### 1.3 **Summary of Main Workflows**

#### 1.3.1 **Commissioning Process (See section 5 for more details)**

1.3.1.1 Sign-up to CP and create an Organisation Record

1.3.1.2 Setup Staff Users and Invite them to use the CP

1.3.1.3 Setup Customised Measures Library

1.3.1.4 Upload Documents to the Organisation Library

1.3.1.5 Add Web Links to the Organisation Library

### **1.3.2 Setup Clients and Care Circle Contacts (See section 6 for more details)**

- 1.3.2.1 Create a New Client on CP and Setup their HomePad
- 1.3.2.2 Add existing Service User to CP as New Client
- 1.3.2.3 Add Staff Users to Client's Care Circle
- 1.3.2.4 Add Client's FFP Contacts to Client's Care Circle

### **1.3.3 Routine Measures, Tests and Combi-Viewer Use (See section 7 for more details)**

- 1.3.3.1 Download and Customise a Measure or Test from the Organisation Library
- 1.3.3.2 Prescribe/Push a Measure to a Client
- 1.3.3.3 Prescribe/Push a Combi-Viewer to a Client
- 1.3.3.4 Push Test Result to a Client

### **1.3.4 Routine Library Use (See section 8 for more details)**

- 1.3.4.1 Upload Documents to Clinician/Admin Library
- 1.3.4.2 Push a Document to a Client's Library
- 1.3.4.3 Add Web Links to Clinician/Admin Library
- 1.3.4.4 Push a Web Link to a Client's Library

**1.3.5 Routine Communication with Clients and their Care Circles (See section 9 for more details)**

1.3.5.1 Call or Send a Message to a Client and their Care Circle Contacts

1.3.5.2 Call or Send a Message to a Client's Care Circle Contact(s)

1.3.5.3 Include a Care Circle Contact in a Message to a Client

1.3.5.4 Add a Care Circle Contact to a Call with a Client

1.3.5.5 Invite a Clients' Care Circle Contacts to join a Group

1.3.5.6 Call or Send a Message to members of a Group

**1.3.6 Schedule and Manage Appointments (See section 10 for more details)**

1.3.6.1 Schedule an Appointment

1.3.6.2 An invited party declines an Invitation

1.3.6.3 Re-arrange an Appointment

1.3.6.4 Cancel an Event

## **2 Data**

### **2.1 Organisation Database**

Each organisation maintains a database to store their Organisation's data, their Staff's Data and any data created by Clients specific to their relationship with the Organisation (Org DB - exact hosting requirements TBA). Clients own personal data will still be hosted elsewhere within their Service User Record.

The Org DB contains the following

**2.1.1 A list of the Organisation's Clients and their Client Records (enrolled by Staff Users)**

**2.1.2 Organisation Staff User Records (those invited to use the CP)**

**2.1.3 Organisation Profile Info (Name, Logo, Address)**

**2.1.4 Organisation Staff Roles and Permission Settings**

**2.1.5 Organisation Measure Customisations – Alerts and Reminder Settings etc.**

**2.1.6 Organisation Library Content – Links and Files**

### **2.2 Staff User Data**

Staff created data is stored in the Org DB. Each staff user has a record within the Organisation's List of Staff Members. Data created by Staff Users that is not related to a Client is generally stored in the Org DB within the Staff User's Record.

Each Staff User Record within the Org DB may contain the following:

**2.2.1 Staff User Email Address and Password (login credentials)**

**2.2.2 Staff User Membership Card (Name, Address etc.)**

Note: Default Address Property = Organisation Address

**2.2.3 Staff User Role Setting (selected from Org. Roles)**

**2.2.4 Staff User Measure Customisations (Clinicians Only)**

**2.2.5 Staff User Library Content**

**2.2.6 Staff User Client List – If the Staff User is a member of a Client’s Care Circle the Client is added to the Staff User’s Client List**

**2.3 Client Data – Client Record**

Some data created by Staff relating to Clients is stored in the Org DB in a record held for each Client. Each Client record is linked to the Client’s Service User Record via the Service User’s Account ID (not simply a HomePad ID as data must be recovered in the event of HomePad replacement). The Client’s Personal Data is still stored on their Service User Record.

Data recorded in relation to self-managed Measures (logged readings, settings etc.) that were prescribed by Organisation Staff Members is stored in the Client’s Service User Health Record.

**2.3.1 Care Circle**

Record of connections between Clients, their Friends and Family Members and the Organisation’s Staff Members is stored in the Org DB. Staff Users included in the Client’s Care Circle are able to access parts of the Client’s Data to enable Care Management. Staff User’s and Client’s FFP contacts in the Care Circle are able to communicate with one another.

NB - Connections between Service Users and their Family and Friends (FFP User) are stored in the Service User Record. If an FFP User is invited to join the care circle of a Client, the connections between Staff Users and FFP Users are enabled by the FFP User’s inclusion in the Care Circle, stored on the Org DB.

**2.3.2 Test Results**

Results of tests managed by the Organisation, with results shared via a “professionally managed measure” (aka test) are stored on the Org DB within the Client Record. The data can be shared by Org Staff Users with other contacts within the Client’s Care Circle. If results are shared with contacts/3<sup>rd</sup> parties outside of the Care Circle the results will need to be saved onto the Service User’s Health Record.

#### **2.4 Service User Health Record**

Measure data recorded by Clients is stored in their Service User Health Record, which is not part of the Organisation Database (and may not be hosted by the Organisation). Clinicians are granted permission to access measure data by default if they have prescribed the (self-managed) measure or combi-viewer. Measure settings changed by Staff Users (or any permitted user) are also stored in the Service User’s Health Record.

#### **2.5 Service User Record**

Enrolling a Client to the CP via their HomePad’s Connect Code must create a connection between the Client Record (in Org DB) and the Service User’s Record. By default, CP users should not be able to edit or create data in the Service User’s Record, but will be granted access to view some data e.g. when a Client has scheduled appointments, their WellTogether Membership card etc. Clients may grant additional permission to Staff users create or edit data on their behalf, but the default CP user roles should not enable this.



### **3 CP Users & Roles:**

This section outlines the default roles available within the CP and the permission each role has to communicate with, and create and access the data of the other roles. The default roles and permissions can be edited to tailor the functionality to the needs of the Organisation.

#### **3.1 Organisation (Super) User**

The CP “Super User”, created to manage Organisation account details and Client and Staff user lists. Also manages Organisation wide Wellness Measure Customisations and Library Content. The only user able to delete Staff, Client and Organisation Records.

#### ***Organisation (Super) User Default Permission Based Functionality and Access:***

##### **3.1.1 Account and Staff Users**

- 3.1.1.1 Create and Manage Staff Users in Organisation Record and invite to use CP
- 3.1.1.2 Create and Manage Staff Roles and Permission settings
- 3.1.1.3 Create and Manage Organisation/Emergency Contact Info
- 3.1.1.4 Setup and Manage Own Login Credentials
- 3.1.1.5 Delete Entire Organisation Record (including Staff Users)
- 3.1.1.6 Create Groups and Invite Staff Users

##### **3.1.2 Wellness Measures and Library Content**

- 3.1.2.1 Create and Manage Organisation Measure Customisations from WT Pro and Consumer Measure Library defaults
- 3.1.2.2 Create and Manage Organisation Library Content (Documents and Links)

#### **3.2 Staff Users**

Organisation staff members may be invited to join WT and use the CP by their Organisation’s Super User Account. Types of Staff User are defined by the role

created and assigned to them by the Organisation User. By default, the Clinician's Portal offers two staff roles:

### **3.2.1 Administrator**

Basic administration and communication permissions are given to the Staff User. Role permissions can be amended by the Organisation.

### **3.2.2 Clinician**

By default, the Clinician role is afforded Administrator user rights plus additional rights to manage their own library of Customised Measures, and prescribe them to their Clients. By default, Clinicians are able to view Clients' data recorded for Measures they prescribed to the Client only.

#### ***Staff User Default Permission Based Functionality and Access:***

### **3.2.3 Signup and Account**

- 3.2.3.1 Setup and Manage Own Login Credentials
- 3.2.3.2 Create and Manage Own WellTogether Membership Card inc. Photo

### **3.2.4 Clients and Care Circle Contacts**

- 3.2.4.1 View Own Client List
- 3.2.4.2 Add Clients to Organisation Record via Connect Code (new Clients are automatically added to the Staff User's Clients List/Record)
- 3.2.4.3 View Organisation Clients List – All CP users are able to view Clients enrolled to the Organisation Client List. They will have limited access to the Client's Data unless they join the Client's Care Circle.
- 3.2.4.4 Invite Client's Contacts to join the Client's Care Circle – if permission is granted to Staff User to view Client's Contacts (TBA)
- 3.2.4.5 Invite people to join the Client's Care Circle via email - must join FFP if not already a member of WT and Client must accept as contact if not already connected.
- 3.2.4.6 Create Groups, Add Clients and Invite Care Circle Contacts to join

3.2.4.7 View Organisation Groups of Clients and their Care Circle Contacts

### **3.2.5 Staff User Contacts**

3.2.5.1 View Organisation Staff User Record/List

3.2.5.2 Request a Staff User to add a Client to their Client List

3.2.5.3 Send Message to Staff Users

3.2.5.4 Call Staff Users

3.2.5.5 Create Groups and Invite Staff Users to join

### **3.2.6 Communication with Clients and Care Circle Contacts**

3.2.6.1 Call and Send Messages to Clients and Care Circle Contacts

3.2.6.2 Call and Send Messages to all Clients and Care Circle Contacts in their own Managed Group

3.2.6.3 Call and Send Messages to all Clients and Care Circle Contacts in an Organisation owned Group.

### **3.2.7 Wellness Library Content**

3.2.7.1 Create and Manage Own Library Content

3.2.7.2 Add Content Clients' Libraries from Own or Organisation Libraries

3.2.7.3 Manage and Delete Library Content from Clients' Libraries

### **3.2.8 Scheduling Appointments**

3.2.8.1 View and Compare availability of Clients and Other Staff Users

3.2.8.2 View and Compare availability of Care Circle Contacts (if contact enables permission – default = no permission)

3.2.8.3 Create Events directly in Clients' Calendars

3.2.8.4 Invite Clinicians/Other Staff Users to Calendar Events

### **3.2.9 Client Hardware Alerts**

- 3.2.9.1 Receive Client's hardware alerts when triggered with option to opt-out for specific Client (can also be changed for all Clients by Organisation User changing defaults in Roles settings)

### ***Clinician only Default Permission Based Functionality and Access***

#### **3.2.10 Wellness Measure Library (Clinicians Only)**

The following Wellness Measure Library access is only available to Clinicians. Administrator users do not have a Measure Library, nor access to the Organisation Library or Clients' Measure Data

**TBA – Requires Clinical Input – Do administrators need to be given permission to input/upload test data and share it with Clients? Is this something only Clinicians will do or is a new User Role required for only this task i.e. for lab staff?**

- 3.2.10.1 View Organisation Measure Customisation Library
- 3.2.10.2 Download Measures, Tests and Combi-Viewers from Organisation Library to Own Measure Customisation Library
- 3.2.10.3 Download Measures, Tests and Combi-Viewers from WT Pro Measure Library to Own Measure Customisation Library
- 3.2.10.4 Change Settings of Own Measures and Combi-Viewers
- 3.2.10.5 Add Measure or Test from Own Measure Library to Clients' Libraries
- 3.2.10.6 Add Measure or Test from Organisation Measure Library to Clients' Libraries
- 3.2.10.7 Add Measure from WT Measure Library to Clients' Libraries
- 3.2.10.8 Add Combi-Viewer from Own, Organisation or WT Library and add Client's Measures to it (only prescribed measures can be added)
- 3.2.10.9 View Client's Measure Data (permitted only for Measures, Tests and Combi-Viewers added by the Clinician)
- 3.2.10.10 Change Settings of Clients' Measures or Remove from their Record (permitted only for Measures added by Clinician/self)
- 3.2.10.11 Log Readings for Clients' Tests (non-self-help measures)
- 3.2.10.12 View Measure Alerts (where staff user is listed as Alert recipient – dependent on Measure settings)

### **3.3 Client**

A Service User enrolled to the Organisation's Client List. Once enrolled, all staff users are able to see the Client in the Organisation Client list. They have limited permission to communicate to their Staff User contacts.

#### **3.3.1 Organisation Database**

- 3.3.1.1 View Staff and Organisation Contact Details/WT Card
- 3.3.1.2 View Contact Details/WT Card of connected Staff users

#### **3.3.2 Communication with Staff Users**

- 3.3.2.1 Send Messages with max-character limit (TBA)
- 3.3.2.2 Cannot call Organisation or Staff Users (unless default permission changed)

### **3.4 Care Circle Contact**

A Basic Contact connected to Staff Users and Service Users, where a relationship has been defined in the CP between the Basic Contact and one or more Clients, allowing staff users to easily communicate with them regarding their shared connection to a client. Typically a Client's Family or Informal Care Contact. Contacts must accept an invitation to connect with the Staff User and/or Organisation to become a "Care Circle" contact (i.e. must opt-in).

#### **3.4.1 Organisation Database**

- 3.4.1.1 View Staff and Organisation Contact Details/WT Card

#### **3.4.2 Communication with Staff Users**

- 3.4.2.1 Send Messages with max-character limit (TBA)
- 3.4.2.2 Cannot call Organisation or Staff Users (unless default permission changed)

## **4 Clinician's Portal UI Features**

This section outlines the key UI features of the CP to enable each user/role to access the functionality and data they require.

### **4.1 Sign-up and Login**

#### **4.1.1 WellTogether.eu**

The existing WellTogether.eu Website must allow Organisations to sign-up to the Clinician's Portal and, in future, download the desktop CP Launcher. Organisations should only have to enter an Organisation Name and create a Password as a maximum of mandatory fields to create a Record and begin using the CP. Other fields/data entry must be optional and/or possible to complete after sign-up.

#### **4.1.2 Join via Email**

As with the Friends and Family Portal, when users are invited to join WellTogether and use the CP via email, the email must contain a link to a specific area of WellTogether.eu where the invited user can sign-up to the CP. When following a link to sign-up, the CP must already populate the sign-up form/process with appropriate data entered by the inviting contact (e.g. New Staff User's Name). The sign-up process should only require the user to create a password as a mandatory field to complete sign-up.

#### **4.1.3 Login**

Opening the CP Desktop Launcher, or navigating to a specific web address/area of WellTogether.eu should open the CP and present users with a simple login field. The CP login should recognise the user and present their previously entered Name/username when possible (through use of cookies) with an option to login as somebody else. During routine use the user should only need to enter their password (created during sign-up) to login. If the device is unable to recognise the username, users are able to enter their email address and password to login (also relevant from other devices). After login users are taken to their "Home" sub-section.

Unlike HomePad, the CP may not be used on a personal mobile device; therefore password fields should be hidden, with an option to toggle visibility to help reduce typos. Ability to remember login credentials should be available whenever login requires details to be entered (e.g. on a new device).

#### **4.1.4 First Use**

As with HomePad and FFP, when a CP user completes the setup workflow and reaches their Home sub-section for the first time they will receive a series of messages allowing them to complete setup or perform important tasks e.g. enrol a client. This allows a streamlined setup process, with recommendations to perform more intensive tasks at their convenience.

#### **4.1.5 On-Screen Keyboard**

The on-screen keyboard should only be displayed during text entry if the CP is used on a mobile/touchscreen device.

## **4.2 Sub-sections and Key Features**

### **4.2.1 “Home” Sub-section**

4.2.1.1 **“Today’s Schedule” (Clinicians and Administrators only)** - A list of scheduled appointments, events etc. as per left hand column in HomePad Calendar Day view. Any invited/attending Clients are listed on the event tile. Select an event from the Schedule to view more details in the Calendar.

4.2.1.2 **“Recent Messages”** - As per HomePad Home sub-section. Select a message to view in Message Detail View. Only shows messages addressed to the user.

### **4.2.2 “Clients” Sub-section (Clinician and Admin users only)**

4.2.2.1 **Landing Page Default View – “Your Clients”**

Clients are listed in this view if the logged in Staff User is a member of the Client’s Care Circle (and therefore are in the Staff User’s Clients List).

Clients are listed in order of alert Status/Colour (red – green), then by most recent first within each colour. They are then listed alphabetically if alert status = null.

4.2.2.2 **Landing Page “A-Z” View**

All Clients in the Organisation Record Client List are listed alphabetically and appears the same for all Staff Users.

4.2.2.3 **Landing Page “Groups”**

A list of all Client Groups created by any Organisation or Staff User. Also includes the logged in staff user’s Personal Groups (not visible to other Staff Users).

4.2.2.4 **“Add New” Client (or Care Circle Contact) - Accessed via Landing**

Page. All CP users can add new Client or Care Circle Contacts to the Organisation Record’s Client List. All Clients added to the list are available to all Staff users via the “Clients” sub-section A-Z View.

4.2.2.5 **Client Detail View** - Similar to the HomePad WT Contact Detail View, each Client’s Detail View contains their Photo, quick links to call and send messages to the Client or view their contact details. In addition to the typical HomePad links, the CP includes extra options for CP users to access the Client’s data, dependent on the permission they have to access the Client record. If Staff Users have been added to the Client’s Care Circle, they will have the following additional options:

4.2.2.5.1 **View Measures (Organisation User and Clinicians only)** – Opens the Client’s Wellness Landing Page Measures View in the Clinician’s Portal Remote View. [See section 4.3.1](#) for details.

4.2.2.5.2 **View Library** – Opens the Client’s Wellness Landing Page – Library View in the Clinician’s Portal Remote View. [See section 4.3.2](#) for details.



- 4.2.2.5.3 **View Calendar** – Opens the Client’s Calendar in Clinician’s Portal Remote View. [See section 4.3.3](#) for details.
- 4.2.2.5.4 **View Care Circle** – Displays a list of Care Circle Contacts connected to the Client. Logged in Staff Users can create a relationship between the Client, the Client’s FFP Contacts and Staff Users by inviting them to the Client’s Care Circle.
- 4.2.2.5.5 **Add to Colleague’s Clients** – Request a colleague to add the Client to their Client List (join Care Circle) – initiates the same workflow as inviting a Staff User to join the Care Circle from the “View Care Circle” page.
- 4.2.2.5.6 **Add to Group** – As per HomePad Contacts. Select from the entire Organisation’s list of Groups (or from the logged in user’s Personal Groups) to add the Client.
- 4.2.2.5.7 **View Notes** – Similar to HomePad Contact Notes, any Staff User with permission to view the Client’s Notes property can add or edit the Notes property. It belongs to the Client Record within the Org DB so a single property exists for all Staff Users i.e. each Staff User does not have their own notes for each Client.
- 4.2.2.5.8 **View Settings** – The tile displays active hardware alerts. Pressing the tile will open the Client’s Settings sub-section in Remote View, displaying any settings the Staff User is permitted to access. Any active hardware/settings alerts will be displayed in the Remote View Alert Bar (as per Measure Alerts). [See Section 4.3.4](#) for details

### 4.2.3 “Staff” sub-section

- 4.2.3.1 **Landing Page “A-Z” View** - All Organisation Staff are listed alphabetically. All Staff Users are able to view and contact all Organisation staff without the need to connect with them. By default, all Staff Users have permission to communicate with, and view Calendar availability of all other Staff Users.

- 4.2.3.2 **Landing Page “Groups” View** – View Organisation or Public Staff Groups, or the Logged in Staff User’s Personal Groups (only visible to the logged in user). Only Staff Users can be added to Staff groups.
  
- 4.2.3.3 **“Add New” (Organisation User only)** - Only Organisation Users can add new Staff Users to the Organisation Record. To Add a New Staff User, the Organisation (Super) User must enter their name, which becomes their username for login and their email address to send an invitation to join WellTogether and use the CP. Once the invited Staff User completes the signup process they are added to the Organisation Staff Record. All Staff Users have access to the Organisation Staff Record, with default permission to Call and Send Messages to each other as well as view Calendar availability.
  
- 4.2.3.4 **“Staff Roles” (Organisation User Only)** – Organisation Users can view and edit Staff Role permission settings and create new roles. Each Staff User is given a role when they are invited to use the CP. Changes to role permission settings will be applied to all Staff Users assigned the role.

#### **4.2.4 “Measures” sub-section (Organisation and Clinician Users only)**

Where a Library of Customised Measures are added, edited and distributed to Clients. Each user will maintain their own library, with Clinician’s able to add measures to their Library from the Organisation Library or WT Library. The Organisation (Super) User can add measures to the Org Library only from the WT library.

- 4.2.4.1 **Organisation Library** – The master Library of all Organisation Measure, Test and Combi-Viewer Customisations. Measures, Tests and Combi-Viewers are downloaded to the library from the WT Pro and Self-Managed Measures Libraries and edited by the Organisation (Super) User. Clinicians are able to download measures from this library to customise them and to their own libraries but cannot add or edit Measures in the Org library. Clinicians can prescribe measures to their Clients directly from the Organisation Library.

4.2.4.2 **Clinician Library** – Each Clinician is able to create their own Library of Customised Measures, Tests and Combi-Viewers. Clinicians can download Measures either from the Organisation Library or the WT Pro and Self-Managed Measures Library to their own Library. They can then change the default settings to create their own version of the Measure in their own Library. Clinicians can prescribe Measures to Clients from their own Library, the Organisation Library or from the WellTogether Library.

#### 4.2.5 “Library” sub-section

Where Documents and Links are added, updated and distributed to Clients. Each user will maintain their own Library, with quick access for Staff Users to the Organisation Library to easily distribute and update Documents and Links in their Clients’ Libraries.

4.2.5.1 **Organisation Library** – The Master Library of all Organisation Documents and Links. Managed by the Organisation (Super) User only. Clinicians and Administrators are able to download content from the Organisation Library to add to their own Libraries or can push content to Clients directly from the Organisation Library.

4.2.5.2 **Clinician’s and Administrator’s Libraries** – Each Clinician and Administrator is able to create their own Library of Documents and Links, either by downloading/adding them from the Organisation Library, or by uploading/adding new content themselves. Clinicians and Administrators can push Documents and Links to Clients from their own Library or from the Organisation Library.

#### 4.2.6 “Calendar” sub-section (Clinician and Admin User Only)

Compare Client, Care Circle and Staff Contact Calendars to schedule events when all parties are available. Streamlined workflow needed for creating events on behalf of Clients and inviting Care Circle Contacts and Staff (compared with HomePad Calendar.)

4.2.6.1 **Compare Mode** – Clinicians and Administrators are able to view Calendar of multiple Users (Staff, Clients and Care Circle Contacts) if they have permission to view the contact’s availability. See D1.2.13 WT Permissions-list doc for more details of Calendar permissions.

4.2.6.2 **Add New** - The Compare Mode view shows where any of the compared contacts have scheduled events, and therefore users are able to quickly identify ‘empty slots’ in order to create appointments via the “Add New” option. The workflow must be similar to the HomePad; however scheduling an appointment in Compare Mode may require a combination of auto-scheduling and invitation workflows depending on the scheduling user’s permission to access the Client/Staff/Care

#### 4.2.7 “Mail” sub-section

The Mail sub-section will be as per HomePad for Service Users, except for the addition of options to include a Clients’ Care Circle contacts when composing a message. Messages received from a Client’s Care Circle contacts should also display the name of the Client they are connected to if the Client is not included in the conversation. Organisation (Super) Users can only send or receive messages to/from Staff Users.

#### 4.2.8 “Settings” sub-section

CP Users require an area to amend Settings relating to their account. Organisation Users must be able to edit their login/account details, the Organisation Profile/Membership Card and Delete the entire Organisation User Account and Database. Staff Users must be able to edit their login details and WT Membership Card. They cannot delete their own account.

Unlike HomePad there is no need to access Hardware settings through the Settings sub-section. CP users may also access their Clients’ Settings via Remote View – [see section 4.3.4 for details](#)

- 4.2.8.1 **Own Login Credentials** – CP Users are able to change their own Username and Password.
- 4.2.8.2 **Membership Card (Clinician and Admin Users only)** – Staff Users can setup and amend their WellTogether Membership Card content as per HomePad user workflows.
- 4.2.8.3 **Emergency Contact Details (Organisation User only)** – Instead of a WT Membership Card, the Organisation is able to populate a single multi-line text property with any information they deem appropriate for their Clients to see when viewing the Organisation’s Contact Detail View. E.g. inGeest Emergency Contact Details for Crisis events.
- 4.2.8.4 **Staff User Roles (Organisation User Only)** – Add or edit Staff User Roles and Permission settings - [see 4.2.3.4 for details](#)
- 4.2.8.5 **Delete Account (Organisation User Only)** – Delete the Organisation account, all Staff Users and all record of the Organisation on WT. Confirmation must be sought to avoid errors and at least 7 days to restore the account/cancel delete in case the decision is reversed.

### 4.3 HomePad Remote View

Clinician’s Portal users may often view Clients’ data/records through the lens of the “Remote View”. This displays a Client’s data/record (accessed via the Client Detail View) as if looking at the Client’s HomePad inside the Clinician’s Portal. The Clinician’s Portal user will only be able to see data/content that they have permission to view (e.g. Measures they have prescribed to the Client). They will not have access to the Service User’s entire Record unless given permission by the Service User.

#### 4.3.1 Client’s Measures Landing Page/Library – “Add New” (Clinicians Only)

Clinicians will be presented with their own Library of Customised Measures in a multi-select state, plus the Organisation Library of Customised Measures in a separate list. They can select Measures from either list to prescribe (add) them to

the Client's Measures Library/Record. Alternatively, they can add Measures direct from the WellTogether Pro or Self-Managed Measures Libraries. Once added, the measure settings and recorded data will be stored in the Client's Service User Health Record, not the Org DB. This enables the data to be shared with other Organisations and ensures Service Users have ownership of their data.

**4.3.1.1 Export Measure Data to Excel file (.xls)** – In Remote View > Measure Detail View > Table View, include an 'export' option to create an .xls from the Table Content. Open device OS File Save dialog box to save the file on the device.

### **4.3.2 Client's Library Landing Page – “Add New” (Clinicians and Administrators only)**

CP users can access a Client's Library via the Client Detail View. From there they can select “Add New” to add content to the Library on the Clients behalf in remote view. Clients cannot add content to the Library themselves; therefore the “Add New” option is not available in HomePad. Clinicians and Administrators will be presented with their own Library of Documents and Links in multi-select state, plus the Organisation Library's Documents and Links in a separate list. They can upload entire folders or create new folders to place content. In the Client's library, the distinction between Links and Files is not necessary.

### **4.3.3 Client's Calendar (Clinicians and Administrators Only)**

The Client's Calendar in remote view is displayed as per Service User's view of their Calendar in HomePad, besides an additional option to compare the Calendar with other Contact's Calendars to schedule appointments.

**4.3.3.1 Compare Mode** – Select multiple Care Circle members to compare with the Calendar of the Client. Events are displayed as 'blocks' of occupied time (unless all members share an appointment and the logged in Staff User has permission to view Event details) to enable the logged in Staff User to easily identify shared 'available slots'. Scheduling appointments in an available slot should add it to all members' calendars or send an invitation (depending on permission to add events).

#### **4.3.4 Clients' Settings Landing Page**

4.3.4.1 **Battery, Wifi and Storage Alerts** – CP Staff Users have permission to access Client's Settings Sub-sections by default to configure Settings on behalf of Clients. Staff Users in the Client's Care Circle will receive hardware settings alerts by default based on default Role permissions. Permissions can be changed by Clients in their Care Contacts list (select Staff, edit permissions) or by Staff Users via the Care Contacts list in remote view.

**Please Note: The following sections detail initial explorations into key CP workflows to help determine required portal functionality. They have been included in this document for reference and include details of when and where data may need to be added to the various Records and Databases within the WellTogether Environment. Specific details may vary in the final CP Wireframes documentation.**

## **5 CP Key Workflows: Commissioning Process**

Organisations must be able to easily create their own profile and invite their staff to 'join' the Organisation as Staff Users. The Staff Users simply need to enter a password to begin using the CP and can create their own Measures customisation and Document/Link libraries (depending on role)

### **5.1 Download the CP and create an organisation**

**5.1.1** From WellTogether.eu, create an organisation account and give it a name. Add a logo (optional). Add message and/or contact details for profile/single field WT Card (optional). For example inGeest emergency contact details for crisis scenarios.

- New Organisation Database Record Created
- Organisation Record – Login Credentials – Organisation Name and Password properties added
- Organisation Record – Name Property added
- Organisation Record – Logo Property added (optional)
- Organisation Record – Contact/Text Property added

*TBA: Organisation Payment Scenario/Setup could be introduced at this stage*

**5.1.2** Option to download the CP launcher/browser software (Details TBA) and Login (is this optional?)

**5.1.3** The Organisation User is auto-logged in after downloading the CP launcher (or choosing not to) and taken to the Staff sub-section (there is no Organisation home page)

### **5.2 Setup Staff Users and Invite to use the CP/Allow Download**

**5.2.1** Amend default Staff User and Client role permission settings. E.g. enable Admin users to add events directly to a client's Calendar, or deny Clients permission to call Clinicians.

- Organisation Record – Roles defaults edited



**5.2.2** Create Clinician and Admin User(s) – Add New Staff User, select role, add email address, send invitation to join.

- Organisation Record – New Staff User Added (Pending Invitation State)
- New Staff User Database Record Created
- Staff User – User Assigned Name/Username Property (for login) added
- Staff User – Email Address Property added
- Staff User – Role (Admin or Clinician) Property (+ Permission Defaults) set

**5.2.3** Staff users receive invitation email with link to welltogether.eu page to access CP – their username (as set by organisation profile) is automatically entered into username field. New Staff User is prompted to create a password.

- Staff User – Login Password Property added
- Staff User Record – New Contact Added (Organisation)
- Organisation Record – Contact State updated (WT Staff State)

**5.2.4** Staff users are given the option to download the CP launcher/browser software.

**5.2.5** After download, or if skipped, the Clinician/Admin users are shown their CP Home sub-section. A message arrives inviting them to update their WT Card settings in Private/Settings.

- Staff User – WT Card Membership Photo Property added (optional)
- Staff User – Availability Property set (optional)

*TBA: Opportunity to introduce payment when a max-number of “free” staff users is exceeded*

### **5.3 Customise Measures and Tests from the WellTogether library to contain in the Organisation Measures Customisation Library**

**5.3.1** Open WT Library in CP (Organisation Profile > Wellness > Add New) – Select a measure to download to the Organisation Measures Customisation Library

- Organisation Record – Measure Added to Measures Customisation Library

**5.3.2** Edit Default Reminder, Alert and Viewing Permission Settings where needed

- Organisation Record – Measure Alert Settings updated (optional)
- Organisation Record – Measure Viewing Permission Settings updated (optional)
- Organisation Record – Measure Reminder Settings updated (optional)

**5.3.3** Add Combi-Viewers to the Library and include Measures from the Org Customisation Library or WT Library – setup view permission, alert and reminder settings

- Organisation Record – Combi-Viewer Added to Measures Customisation Library
- Organisation Record – Combi-Viewer Measures Property
- Organisation Record – Combi-Viewer Log Readings Permission updated (optional)
- Organisation Record – Combi-Viewer Alert Settings (optional)
- Organisation Record – Combi-Viewer Viewing Permission Settings (optional)
- Organisation Record – Combi-Viewer Reminder Settings (optional)

## **5.4 Upload Documents to the Organisation Wellness Library**

**5.4.1** Add a file to the Organisation Wellness Library or create a folder and add file to it

- Organisation Record – Wellness Library – New Folder

**5.4.2** Select File(s) to Upload from Windows Explorer

- Organisation Record – Wellness Library – New File
- Organisation Record – Wellness Library Folder – New File

## **5.5 Add Web links to Organisation's Wellness Library**

**5.5.1** Open webpage link by pasting into web browser in CP

**5.5.2** Create link in Organisation Wellness Library folder

- Organisation Record – New Link added to Wellness Library

## **6 CP Key Workflows: Setup Clients & Care Circle Contacts**

The Organisation can setup Service User accounts on HomePads on behalf of their Clients. The Organisation can then easily create connections between the Service User accounts and their Staff Users before handing the HomePads to their Clients.

### **6.1 Create a user from scratch and then setup their HomePad**

#### **6.1.1 On New Tablet, Turn on, Join Wifi, Setup and Enter Client Name**

- New Service User Database Record Created
- Service User HomePad ID Property
- Service User Language Setting Property
- Service User Allowed Wifi Network Property (inc. password)
- Service User Name Property

#### **6.1.2 Setup WellTogether Membership Card (where applicable) and create Connect Code on user's behalf**

- Service User Connect Code Property
- Service User Home Phone Number Property (optional)
- Service User Home Phone Address Property (optional)
- Service User Second Phone Number Property (optional)
- Service User Second Phone Address Property (optional)
- Service User Membership Photo Property (optional)

### **6.2 Add Contact to Organisation Record (same for existing WT Client/HP members)**

#### **6.2.1.1 Add New Client and enter a Connect Code**

- Organisation Record - New Contact Added (Pending State)
- Organisation Record - Contact Name

#### **6.2.1.2 Enter Connect Code & Confirm**

- Organisation Record – Contact HomePad ID
- Organisation Record – Contact State = Client Contact
- Service User Record – New Contact Added (Organisation)

#### **6.2.1.3 Client receives message to inform them that new contact was added (as per HomePad workflow)**

### **6.3 Add Clients Friends/Family Contacts to Care Circle**

#### **6.3.1 Select Client, Open Care Circle and add new. Enter email address or select from Client's Contacts and send invitation**

- Organisation Record – Contact Added (Pending State) to Care Circle

- Organisation Record – Contact Email Address and Name Properties added
- 6.3.2** Contact Accepts invitation and joins WT as FFP user, or accepts invitation if already joined
- Organisation Record – Contact State = Care Circle Contact State
  - Client Record – New Care Circle Member Added (Organisation)

## **7 CP Key Workflows: Routine Measures, Tests and Combi-Viewer Use (Wellness)**

Clinicians can create their own Customisations of Measures if required, and prescribe them, or their Organisation's customised measures to their Clients. When prescribing a measure, the Clinician automatically is given permission to view the Client's measure Data.

### **7.1 Download a measure or test from the Organisation Measure Customisation Library and amend settings**

- 7.1.1 Select "Add New" from Clinician's Measure Customisation Library
- 7.1.2 Select and 'download' a measure from Organisation Customisation library or WT Library
  - [Staff User Record – Measure Added to Clinician's Customisation Library](#)
- 7.1.3 Edit Reminder, Alert and Permission Settings where needed
  - [Staff User Record – Measure Alert Settings updated \(optional\)](#)
  - [Staff User Record – Measure Permission Settings updated \(optional\)](#)
  - [Staff User Record – Measure Reminder Settings updated \(optional\)](#)

### **7.2 Prescribe/Push a Measure to a Client**

#### **7.2.1 Option A – From Staff or Organisation Customisation Library**

- 7.2.1.1 Open Clinician's or Organisation Measures Customisation Library
- 7.2.1.2 Select a measure to prescribe
- 7.2.1.3 Select one or more Clients to prescribe the measure to
  - [Service User Record – Measure added to "Your Measures"](#)

*Note: This method is efficient for prescribing measure customisations with multiple clients/service users*

#### **7.2.2 Option B – From Client's Measures**

- 7.2.2.1 Open Client Detail View
- 7.2.2.2 View Measures and select "Add New"
- 7.2.2.3 Select one or more measures to prescribe to the client
  - [Service User Record – Measure added to "Your Measures"](#)

*Note: This method is efficient for prescribing multiple measures to a single client/contact*

#### **7.2.3 Service User receives notification of new measure**

## **7.2.4 Customise Measure Settings for individual client if required**

7.2.4.1 Open Client Detail View

7.2.4.2 View Measures and select a Measure to customise

7.2.4.3 Edit Permission, Reminder and/or Alert settings

- Service User Record – Measure Alert Settings updated (optional)
- Service User Record – Measure Permission Settings updated (optional)
- Service User Record – Measure Reminder Settings updated (optional)

## **7.3 Prescribe a Combi-Viewer to a Client**

*Note: This should be the same as measures if clinicians are able to prescribe only pre-configured Combi-Viewers. If they must be able to prescribe a Combi-Viewer and select measures afterwards, a separate workflow will need to be explored.*

## **7.4 Share a Test (result) with a Client**

7.4.1 Prescribe test (if not already prescribed)

- Service User Record – Test added to “Your Measures”

7.4.2 Record/Log data

- Service User Record – Test Data updated

7.4.3 Service User receives notification message of new test data, with a link to view it

## **7.5 Measure Permissions**

In HomePad Service Users are able to amend the permission afforded to contacts to allow them to add measures directly to their HomePad, recommend measures only, or not access Wellness at all. To prevent Clients changing the permission settings of their Clinician contacts and no longer allowing them to prescribe measures, Clients should not be able to change the permission settings of Clinician contacts to prescribe measures direct to their HomePad/Service Records.

## **7.6 Take Consultation Notes**

7.6.1 Open Client Detail View – View Notes – Edit

- Staff User Record – Client Notes Property updated (specific to client but not recorded in client record)

*Note: Should clinician notes for a contact be shared with other staff users/saved in organisation record? Or should they be saved to the clinician record and kept private between clinician and client?*

## **7.7 Client's Wellness Alerts**

Measure Alerts may have staff users configured as alert recipients, whether setup via CP, FFP or HP. If a Staff/CP user has accepted the invitation to join the alert recipient list, when an Alert is triggered it must be received somewhere within the CP. CP users may still receive their own alerts for Calendar reminders and Received Messages etc.

Client's alerts could be displayed in the CP:

- 7.7.1** As Messages on HomePage with shortcut to alert via "Remote View"
- 7.7.2** As an Alert Colour on the Contact Tile only - access "Remote View" via Contact Detail View
- 7.7.3** Listed on the Contact's Detail View – press smart arrow to enter "Remote View"

## **8 CP Routine Workflows: Library and Links (Wellness)**

### **8.1 Upload files to Clinician or Admin Document Libraries**

- 8.1.1** Log in as Clinician or Admin user and open the Wellness Document Library
- 8.1.2** Option A - Select to Add New Documents and select from the Organisation Document Library
- 8.1.3** Option B – Select to Add New Documents and select one or more files from Windows Explorer to add
  - [Staff User Record – Document Library – File\(s\) added](#)

### **8.2 Push a file to a Client’s Document Library**

- 8.2.1** Open Client Contact Detail View
- 8.2.2** Open Client’s Wellness Document Library
- 8.2.3** Select a folder if required (e.g. inGeest folder)
- 8.2.4** Select Add New
- 8.2.5** Option A: Select one or more documents from the Clinician’s or Organisation’s Document Library and add them.
- 8.2.6** Option B: Select one or more files from Windows Explorer and add them.
- 8.2.7** Documents are added direct to client’s Library/Folder
  - [Service User Record – Document\(s\) added to Wellness Document Library](#)

*Note: This method is efficient for prescribing multiple documents to a single client.*

*Note: Uploading a file of the same name to the same location should automatically overwrite the existing file. No version number should be displayed in HomePad, but should be visible to the staff user uploading the file.*

- 8.2.8** Service User(s) receive notification of new Document(s) – the client receives a message for each document that is added to their Library, with a link to the document.

### **8.3 Add Web links to Clinician’s Document Library**

- 8.3.1** Open webpage link by pasting into web browser in CP

*Note: Is it possible to add bookmarks to the Clinician’s library without opening the website in a CP ‘browser’ window? Pasting a link directly may not be ideal as it may need testing that it opens in WT browser. E.g. export browser bookmarks to HTML file. Another method may avoid a ‘superfluous’ CP browser (no need for ‘accessible browser’ on CP or FFP).*

- 8.3.2** Create Bookmark in Clinician bookmark folder (via web browser)
  - [Staff User Record – Web Bookmark Added](#)



- 8.3.3** In Clinician document library select “add new” and navigate to bookmarks, select bookmark(s) to add them.
- [Staff User Record – Web Link Added to Document Library](#)

#### **8.4 Add Web Links to a client’s HomePad**

- 8.4.1** In Client’s Document library, select “Add New” and navigate to folder containing Clinician’s or Organisation’s Web Links
- [Service User – Web Link Added to Document Library](#)
- 8.4.2** Service User receives notification message containing a link to open the New Link.

## **9 CP Routine Workflows: Client Communication**

For Staff Users, sending messages to their clients uses the same workflows on CP as for service users on the HomePad. Service users can also send and reply to messages from staff users, but a character limit is imposed via role based permission settings. Service User to Clinician or Admin CP user role = character limit (number TBA).

Staff/CP Users can also send messages to their clients' care circle contacts via the clients' -

### **9.1 Send a Message to a Client's Care Circle Contacts**

**9.1.1** Select a client to open Contact Detail View.

**9.1.2** Select a 'Care Circle' contact to view their Contact Detail View

**9.1.3** Select "Send a Message", compose the message and send

- Basic/Care Circle Contact Record – New Message (plus New Conversation if applicable)
- Staff User Record – Sent message added to Conversation (or New Conversation added)

Care Circle contacts can also be added to a message where a Client or Basic Contact is already added to the "message recipients property".

### **9.2 Include a Client's Care Circle Contact(s) to a message addressed to the client**

**9.2.1** When composing a message already containing contacts in the recipients property, select "Edit Recipients".

**9.2.2** The Contacts List displays all added contacts' care circle at the top of the list or additional view (TBA). E.g. If a client is added to a message, the staff user can easily find and add their family members to include in the message.

**9.2.3** Select required Care Circle contact(s) to add to the message

**9.2.4** Send message

**9.2.5** For each involved user, a conversation between all message recipients and the sender is created or updated.

- Service User Record – New Message (plus New Conversation if applicable)
- Basic/Care Circle Contact Record – New Message (plus New Conversation if applicable)
- Staff User Record – Sent message added to Conversation (or New Conversation added)

### **9.3 Call Clients and their Care Circle contacts**

Staff users can call Clients and Basic Contacts as per HomePad workflows. By default, service users cannot call Staff Users.

**9.3.1** Option A: Open a Client or Care Circle Contact's Contact Detail View and select a Care Circle Contact to open their Contact Detail View. Select "Start a Call".

**9.3.2** Option B: During a call with a client or Care Circle Contact, select "Add Callers". Any contacts with an established relationship property to the contact(s) in the

call will be displayed at the top of the list or in another view of the contact list (TBA). Select them to add to the call.

**9.3.3** The CP will attempt to connect a call until the Contact answers or the Staff user cancels the attempt to call the contact as per HomePad workflow. The call should not automatically 'time-out'

**9.3.4** If the attempt to call is manually cancelled by the caller, a "Missed Call" smart arrow alert is displayed on the contacts portal as per HomePad workflow.

- **Service User Record – Missed Call**
- **Basic/Care Circle Contact Record – Missed Call**

#### **9.4 Invite Clients and/or their Care Circle contacts to join a group**

**9.4.1** Option A: Invite a Client or Basic contact as per HomePad workflow.

**9.4.2** Option B: Open Contact Detail View to display Client's care circle contacts, select a contact and invite to a group as per HomePad.

**9.4.3** Option C: Select "Add Members" from the Group Detail View. Contacts related to contacts already in the group are displayed at the top of the contact list or in a separate view of the list (TBA).

- **Service User Record – New Group**
- **Basic/Care Circle Contact Record – New Group**
- **Staff User Record – New Group Member(s)**

#### **8.5 Communicate with Group**

As per HomePad Groups communication. Send a Message or Start a Call with all Group Members.

## 10 CP Routine Workflows: Managing Appointments

### 10.1 Setup an Appointment between a Clinician, Client and/or Care Circle Contact

Staff Users may need to create appointments between Clinicians and Clients on the Clinician's behalf. Typically, users can add events to a Contact's Calendar on their behalf (if permission is granted) by opening the contact's Calendar, checking their availability and creating an event. They also have the option to invite themselves to the event via their Contact's Calendar, which would auto-confirm their own attendance and add the event to their Calendar.

In addition to this in the CP, Admin users may want to compare a Client's availability with a Clinician's before creating an event. If they have permission to access their Calendar, they may also want to check availability of the Client's Care Circle Contact(s) at the same time.

- 10.1.1 Open a Client or Clinician's Calendar View via the Contacts sub-section > Contact Detail View
- 10.1.2 Select "Scheduling view"
- 10.1.3 Select "Add Contact". Select a Client, Clinician and/or Care Circle Contact(s) from the list to add their Calendar to the first Contact's Calendar. Any Care Circle contacts of Clients that have been added to the Calendar Schedule view are displayed at the top of the list.
- 10.1.4 Browse Calendar for empty shared timeslot and Select it
- 10.1.5 Create Event
- 10.1.6 Confirm/Select Clients to Create Event For/Send invite
- 10.1.7 If the Creator has permission, the Events are created directly into the Contacts' Calendars
- 10.1.8 If they only have permission to invite any of the contacts that they are creating an event for, the user will be required to complete an event invitation workflow as per HomePad Calendar.
- 10.1.9 Creator auto-receives any invitation responses on behalf of Contact
- 10.1.10 Clinician, Client and Care Circle contacts receive invitations to the event via a message and confirm their attendance
  - Service Record – Calendar Event Status Updated (invited contact)
  - Care Circle Contact Record – Calendar Event Status Updated (attending state)
  - Staff User Record - Calendar Event Status Updated (invited contact – attending state)
  - Staff User Record – New Message Received (organiser)

### 10.2 A Client, Care Circle Contact or Clinician declines an invitation to an Appointment

Where an event organiser only has permission to invite Clinicians, Clients or Care Circle contacts to an appointment and one or more of the invited attendees declines the invitation.

**10.2.1** In the invitation or message or Pending Event's "Event Detail View", the invited client, clinician or Care Circle contact selects "Decline Invitation"

**10.2.2** An option to customise a default message is presented

**10.2.3** Sending the message confirms the response

- Staff User Record – New Message Received (if organiser)
- Staff User Record – Calendar Event Deleted (if invitation declined)
- Service Record – Calendar Event Deleted (if invitation declined)
- Care Circle Contact Record – Calendar Event Deleted (if invitation declined)

### **10.3 A Client, Care Circle Contact or Clinician can no longer attend a scheduled appointment and would like to rearrange it**

Where an event organiser only has permission to invite Clinicians, Clients or Care Circle contacts to an appointment and one of the attending contacts can no longer attend. Or where a contact has had an event added directly to their Calendar (no invitation), and cannot attend.

**10.3.1** In the Event Detail View of their Calendar, the invited Client or Clinician selects "Cancel Attendance". This option exists instead of the "delete event" option presented to the event organiser.

**10.3.2** An option to send a message to the event organiser is displayed.

**10.3.3** The event organiser (typically an Admin user) received a message, either displaying a default message from WellTogether or the customised message from the Client.

**10.3.4** The event is removed from the Clinician or Client's Calendar (only contacts that are unable to attend).

- Staff User Record – Event Invitation Status Updated (if organiser)
- Staff User Record – New Message Received (if organiser)
- Staff User Record – Calendar Event Deleted (if attendance cancelled)
- Service Record – Calendar Event Deleted (if attendance cancelled)
- Care Circle Contact Record – Calendar Event Deleted (if attendance cancelled)

### **10.4 Sending details of a rearranged event to invited parties**

The event organiser can review the declining party's calendar availability as per original invite workflow or reschedule the event to a time/date specified in a customised availability message.

**10.4.1** The event organiser presses "reschedule event" in the Event Invitation Status page to enter "Event Edit" workflow

**10.4.2** Event name, Time and Date properties can be edited, along with Location, Reminders, Repeat settings etc.

**10.4.3** A message can be personalised (or default sent) to explain the change of event properties and is sent to all invited or attending contacts

- Staff User Record – Calendar Event Edited
- Service Record – Calendar Event Edited
- Care Circle Contact Record – Calendar Event Edited

**10.4.4** Each contact receives the message and can either confirm or decline their attendance.

- Staff User Record – New Message Received (invited contacts, not event organiser)
- Service Record – New Message Received/Conversation Updated
- Care Circle Contact Record – New Message Received/Conversation Updated

**10.4.5** Event Organiser Receives confirmation messages for each contacts' actions as per HomePad workflow.

- Staff User Record – New Message Received (organiser)
- Staff User Record – Event invitation Status Updated (organiser)
- Staff User Record – Calendar Event Attendance Status Edited (invited user)
- Service Record – Calendar Event Attendance Status Edited
- Care Circle Contact Record – Calendar Event Attendance Status Edited

## **10.5 Cancel an Event and inform all attendees**

**10.5.1** The Event Organiser (Admin User) selects “Cancel Event” from the Event Details View on their own Calendar

**10.5.2** The organiser is able to customise the message sent to all invited/attending contacts to inform them that the event has been cancelled.

**10.5.3** The event is removed from all users' Calendars once the message is sent/cancellation confirmed.

- Staff User Record – Calendar Event Deleted
- Service Record – Calendar Event Deleted
- Care Circle Contact Record – Calendar Event Deleted
- Staff User Record – New Message Received (invited contacts, not event organiser)
- Service Record – New Message Received/Conversation Updated
- Care Circle Contact Record – New Message Received/Conversation Updated