



Maternity Service

User Guide v1.0

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1. Service Overview

1.1. Introduction

The purpose of the Maternity service is to give the patients a portal to submit their queries online.

These queries are then tracked online through the users in the Organisation.

All such patient queries are termed as Referrals.

A team of users called Referral team is created to track such requests.

Then the system has system administrators to manage the referral team.

On the top of all is the organisation administrator. There is only one organisation administrator in the system

1.2. Important Features

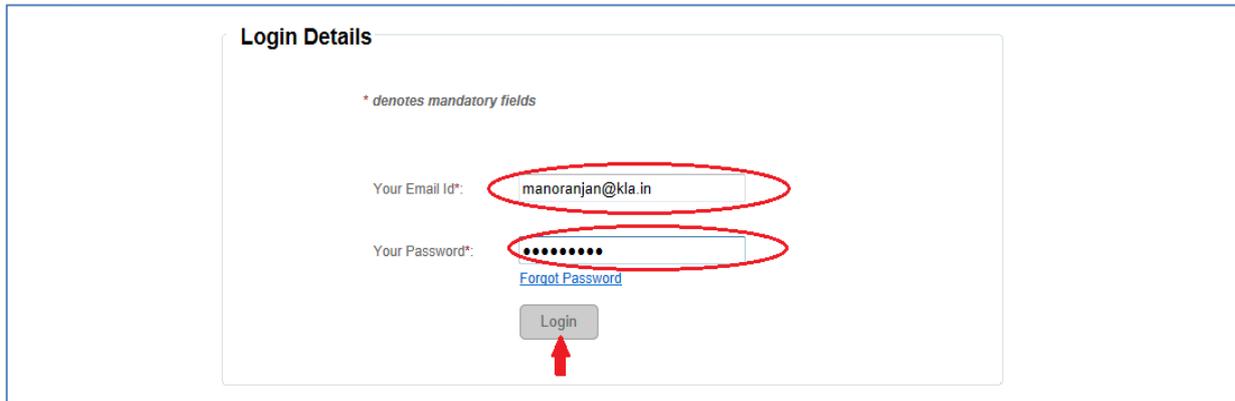
1. RBAC: This system has role Role Based Access Control
2. Full WorkFlow Management
3. Single-Sign On
4. Database encryption
5. username is email address and it is the unique identifier for any user
6. Notification Emails: User has the option if he wants to Receive Notification emails. He can set it through **My Profile** menu.
7. Password: Forgot Password, system-generated password
8. All users in the system are registered through someone higher in the hierarchy.
9. All users have Edit-Profile and Change Password option
10. A user may have more than one role in the system
11. An OA can assign any role to self
12. An SA and referral can only edit the self-roles at the same level
13. Active/Delete: Any user can be activated or deactivate in the system. He can also be deleted from the system.
14. Bread-crums

2. Common Features

2.1. Login

All users login through the Login screen:

To log in to the service, user can enter his registered email id and password.

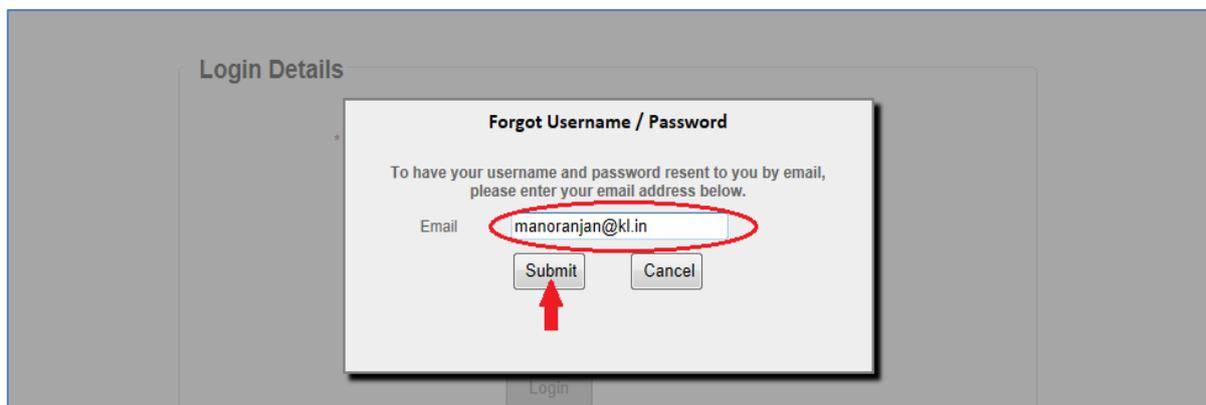


The screenshot shows a 'Login Details' form with the following elements:

- A note: ** denotes mandatory fields*
- A text input field for 'Your Email Id*' containing 'manoranjana@kla.in', circled in red.
- A password input field for 'Your Password*' containing masked characters (dots), circled in red.
- A blue link labeled 'Forgot Password' below the password field.
- A grey 'Login' button at the bottom, with a red arrow pointing to it.

Forgot password:

If you forget the password, please click on Forgot Password and enter your email id -> click on **Submit** button as in the screen below:



The screenshot shows a 'Forgot Username / Password' dialog box with the following elements:

- Title: **Forgot Username / Password**
- Text: 'To have your username and password resent to you by email, please enter your email address below.'
- A text input field for 'Email' containing 'manoranjana@kl.in', circled in red.
- Two buttons: 'Submit' and 'Cancel'. A red arrow points to the 'Submit' button.

A system-generated email is sent to the given email-id with random password. Please use this password and your email-id to login. You will have to reset your password 1st time after you login using system-generated random password as below:

Reset Password:

Enter **New Password** -> **Confirm New Password** (Note: confirm new password should be same as new password) -> click on **Change Password** button

After resetting the password, user can enter his email id and password on the Login screen -> click on **Login** button to Login

Reset Password

* denotes mandatory fields

New Password*:

Confirm New Password*:

Change Password

2.2. Home screen

The username and his roles in the system is defined at the Top of the screen.

Welcome Org Admin, you have the following roles in this service: Organisation Administrator, Service Administrator, User

All the users have the following Top Menu

HOME | MY PROFILE | USER GUIDE | CONTACT SUPPORT | LOGOUT

The Home screen is divided into tabs and the tabs are based on the role.

Referral Team

Referrals | Service Administrators | Referral Team

Active

Sort by: Select

Search name or email

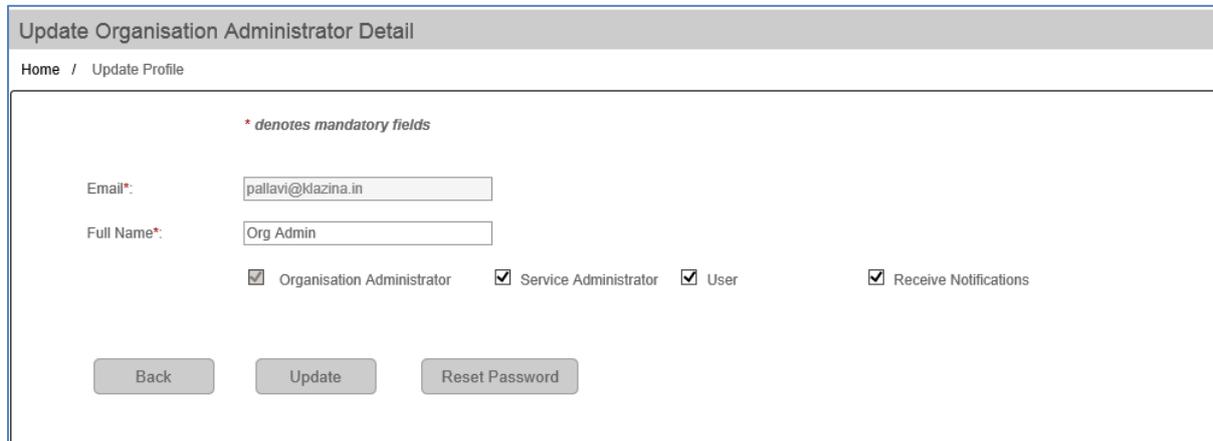
2.3. Active/Inactive Checkbox

Active

On the top of each grid, **Active** checkbox is present. By default, active checkbox is checked and lists the active users/SAs in the list. Unclick this checkbox to see the list of inactive users/SAs

2.4. My Profile

OA/SA can update self-profile through this Menu:



The screenshot shows a web form titled "Update Organisation Administrator Detail". At the top left, there is a breadcrumb trail: "Home / Update Profile". Below the title, a note states "* denotes mandatory fields". The form contains two input fields: "Email*" with the value "pallavi@klazina.in" and "Full Name*" with the value "Org Admin". Below these fields are four checkboxes: "Organisation Administrator" (checked), "Service Administrator" (checked), "User" (checked), and "Receive Notifications" (checked). At the bottom of the form, there are three buttons: "Back", "Update", and "Reset Password".

User(OA/SA) can click on **Reset Password** to reset his password. A system-generated email will be sent to the user. User will then have to reset his password, first time, he logs in.

2.5. Contact Us

A click on the contact us menu opens the contact us page on IGs website, in a new tab.

2.6. User Guide

A user guide document will open on a new tab.

2.7. Log-out

The user can log-out.

All users have the privilege to Logout from the system.

3. Organisation Administrator

3.1. Login

Organisation Administrator will have to Login through the common Login screen.

3.2. Default screen

OA has the primary role of managing service admin therefore, Service Administrators is his Home screen

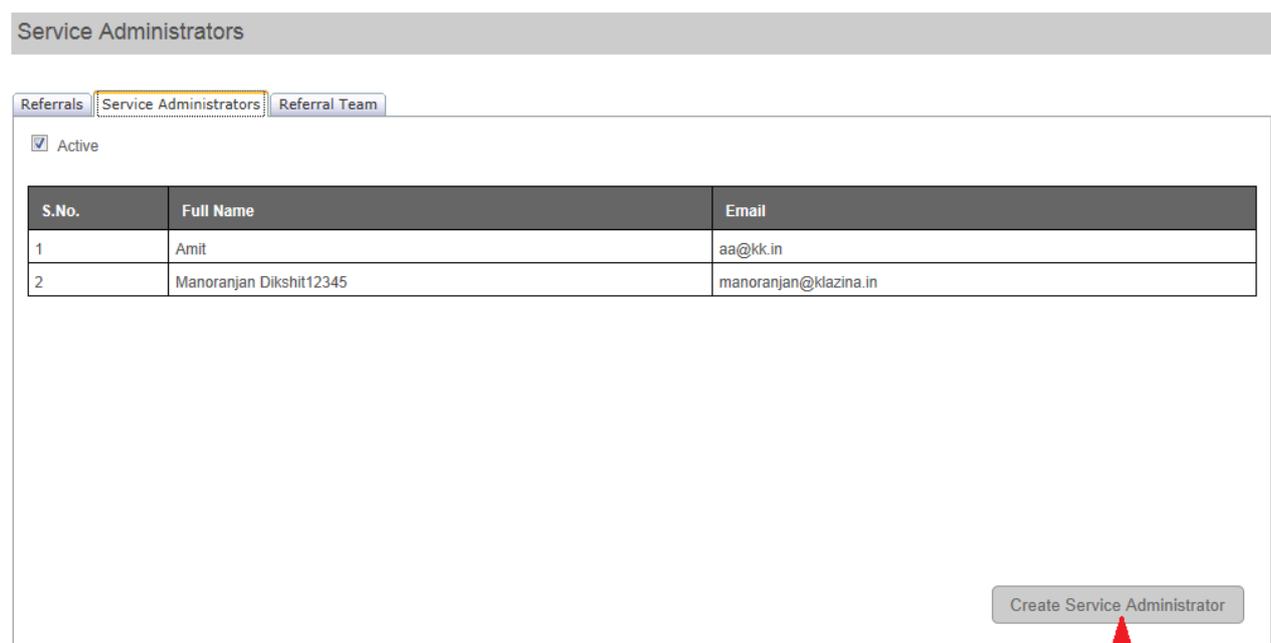
3.3. Role

OA has following role in the system:

Create and Manage Service Administrator

Create a Service Administrator

On the **Home Page** -> on the **Service Administrators** tab -> click on button **Create Service Administrator**



Service Administrators

Referrals Service Administrators Referral Team

Active

| S.No. | Full Name | Email |
|-------|-------------------------|-----------------------|
| 1 | Amit | aa@kk.in |
| 2 | Manoranjan Dikshit12345 | manoranjan@klazina.in |

Create Service Administrator

Fill in the following form (Enter email id and full name) -> click on **Register** button to register the system administrator.

To provide user role to the SA ; check **User** option

To allow referrals acknowledgment by mail check **Receive Notification** option

A system-generated email will be sent to the new user with a random password. User will be asked to reset his password, first time he tries to login.

Service Administrator Registration

Home / Service Administrator Registration

** denotes mandatory fields*

Email*:

Full Name*:

Assign Role*: Service Admin User Receive Notifications

Manage a Service Administrator

On the **Home Page** -> on the **Service Administrators** tab, list of SAs is populated.

Service Administrators

Referrals | **Service Administrators** | Referral Team

Active

| S.No. | Full Name | Email |
|-------|--------------|-----------------------|
| 1 | Stuart Cooke | matsa@stuartcooke.com |

Click on the user in the grid to open the **Update Service Administrator Detail**

Update Service Administrator Detail

Home / Update Profile

** denotes mandatory fields*

Email*:

Full Name*:

Service Administrator User Receive Notifications

Active

An OA can:



Can modify **Full Name**, revoke/grant **User** role or stop/start **Receive Notification** ->
click **Update** to update profile.

Click on **Reset Password** button to reset password of this particular profile: **Reset Password** sends a system-generated random password to the SA through email. The SA will have to reset his password when he logs-in.

Click on **Delete Service Administrator** button to delete Service Administrator's profile.

4. Service Administrator

4.1. Login

SA will Login through the common Login screen using his user-id and password.

4.2. Default screen

SA has the primary role of managing the Referral team therefore, Referral Team is his Home screen

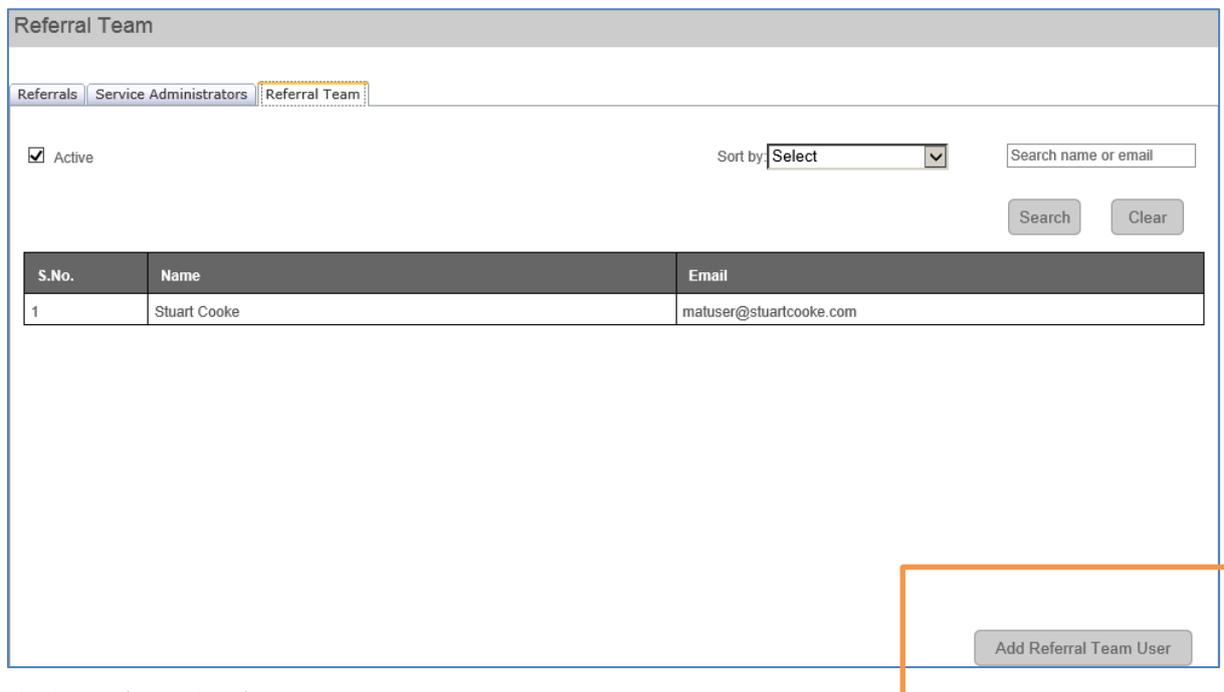
4.3. Role

SA has following role in the system:

Create and Manage the Referral team

Add Referral Team user

On the **Home Page** -> on the **Referral Team** tab -> click on button **Add Referral Team User**



| S.No. | Name | Email |
|-------|--------------|-------------------------|
| 1 | Stuart Cooke | matuser@stuartcooke.com |

Fill in the following form:

Enter **Email** and **Full Name** -> click on **Register** button to register User: A system-generated email will be sent to the new user with a random password. User will be asked to reset his password, first time he tries to login.

To stop/start Notification by mail: check/uncheck **Receive Notification**

Referral Team User Registration

Home / Referral Team User Registration

** denotes mandatory fields*

Email*:

Full Name*:

Assign Role*: User Receive Notifications

Back

Register

Manage a Referral Team

On the **Home Page** -> on the **Referral Team** tab, list of users is populated.

Referral Team

Referrals | Service Administrators | Referral Team

Active Sort by:

| S.No. | Name | Email |
|-------|--------------|-------------------------|
| 1 | Stuart Cooke | matuser@stuartcooke.com |

Click on the user in the grid to open the **Update Referral Team Detail**

Update Referral Team Detail

Home / Referral Team List / Update Profile

** denotes mandatory fields*

Email*:

Full Name*:

User Receive Notifications

Active

An SA can:

Enter **Full Name**; check/uncheck Receive Notification to start/stop send notification by mail -> click on **Update**

Click on **Reset Password** button to reset password of this profile: **Reset Password** sends a system-generated random password to the user through email. The user will have to reset his password when he logs-in.

Click on **Delete Referral Team** button to delete User's profile.

5. Referrals

5.1. Login

Referrals will Login through the common Login screen using his user-id and password.

5.2. Default screen

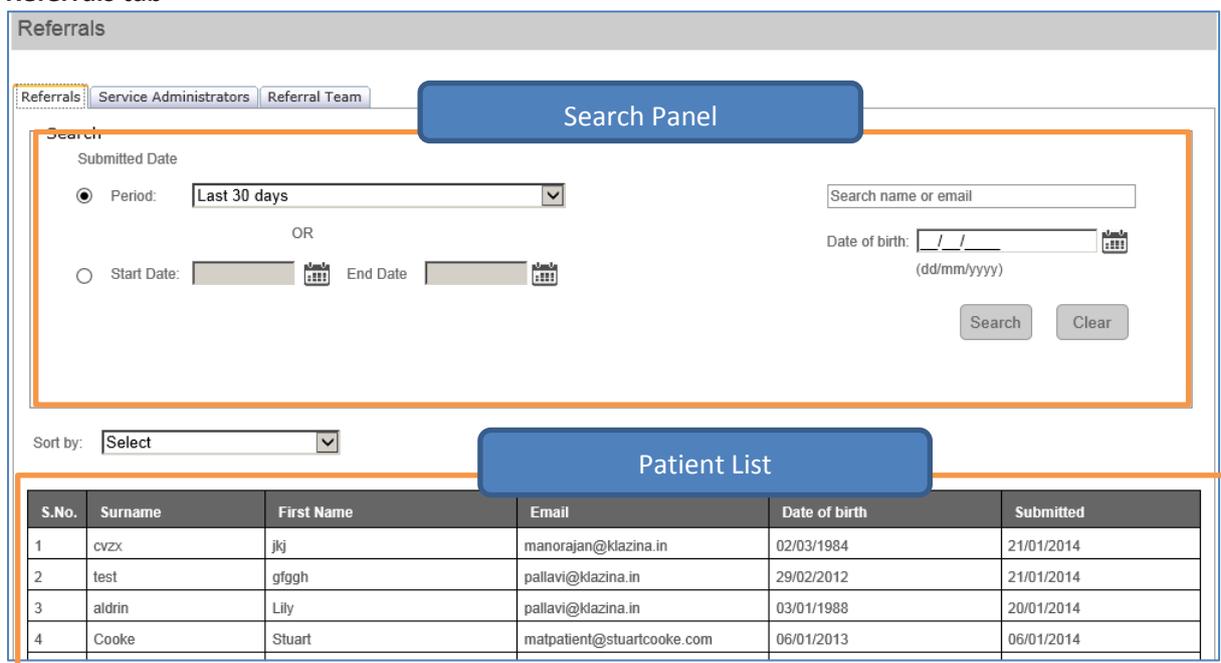
The primary role of users/referrals is to see and manage the requests of patients. Therefore **Referrals** tab is his default tab.

5.3. Role

Referral has following role in the system:

1. Have referrals record
2. Can search for referrals record based on submitted date, date of birth and search text by surname, first name and email
3. Can open the enquiry form submitted by the patient.

Referrals tab



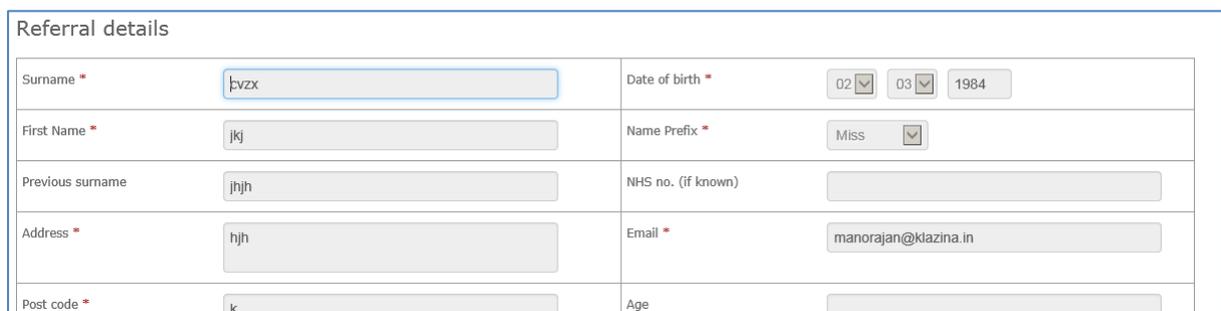
The screenshot shows the 'Referrals' tab interface. At the top, there are tabs for 'Referrals', 'Service Administrators', and 'Referral Team'. A 'Search Panel' is highlighted with a blue box, containing a search form with the following fields:

- Submitted Date: Period: Last 30 days (dropdown)
- OR
- Start Date: End Date:
- Search name or email:
- Date of birth: (dd/mm/yyyy)
- Buttons: Search, Clear

Below the search panel, there is a 'Sort by:' dropdown menu set to 'Select'. A 'Patient List' is highlighted with a blue box, containing a table with the following data:

| S.No. | Surname | First Name | Email | Date of birth | Submitted |
|-------|---------|------------|----------------------------|---------------|------------|
| 1 | cvzx | jkj | manorajan@klazina.in | 02/03/1984 | 21/01/2014 |
| 2 | test | gfggh | pallavi@klazina.in | 29/02/2012 | 21/01/2014 |
| 3 | aldrin | Lily | pallavi@klazina.in | 03/01/1988 | 20/01/2014 |
| 4 | Cooke | Stuart | matpatient@stuartcooke.com | 06/01/2013 | 06/01/2014 |

Click on any patient on the list to see the details: Non-editable form is displayed



The screenshot shows the 'Referral details' form, which is non-editable. It contains the following fields:

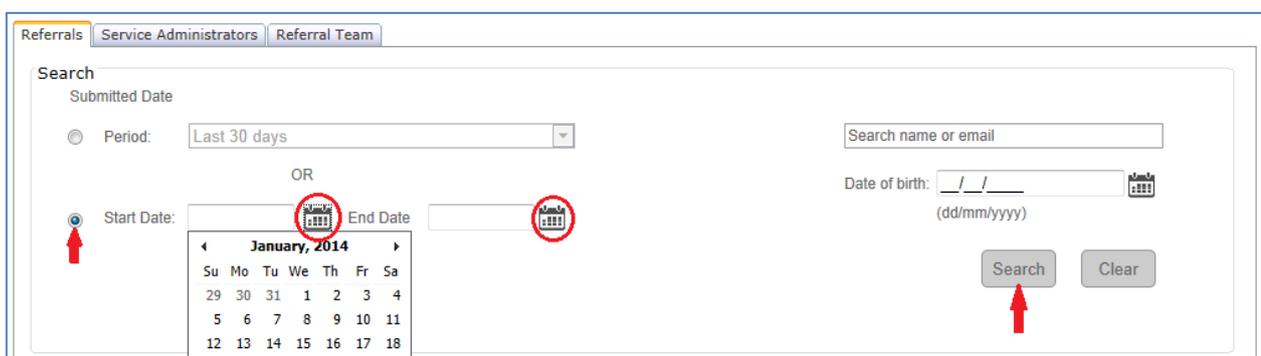
- Surname *: cvzx
- First Name *: jkj
- Previous surname: jnh
- Address *: hjh
- Post code *: k
- Date of birth *: 02/03/1984
- Name Prefix *: Miss
- NHS no. (if known):
- Email *: manorajan@klazina.in
- Age:

5.4. Search Functionalities

Search by Period: User may select option from list and click on search button to filter referrals data.

Last 30 Days is the default value in the **Period** drop-down. The other options in the **Period** drop-down are:

- Today
- Yesterday
- Last 7 days
- Last 30 days
- Previous Month



Referrals | Service Administrators | Referral Team

Search

Submitted Date

Period: Last 30 days

OR

Start Date: End Date:

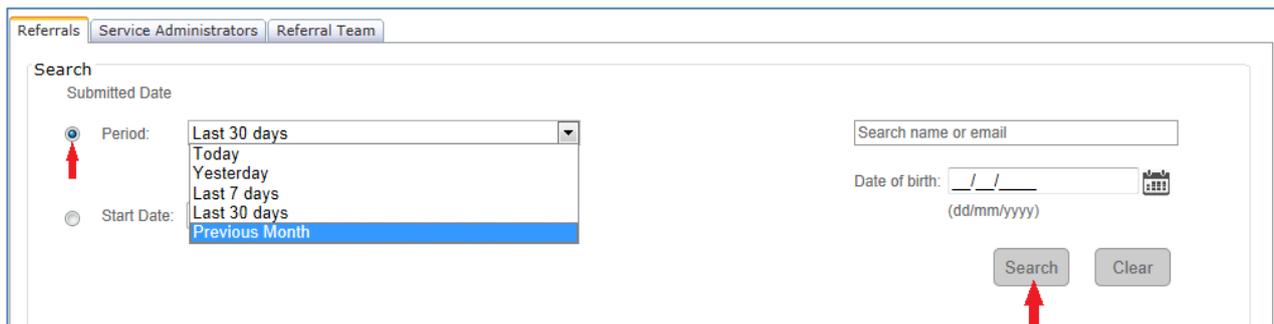
Search name or email

Date of birth:

(dd/mm/yyyy)

Search Clear

Search by submitted date range: check **Start Date** radio button() -> click on **Calendar** to select start date and end date -> Click on **Search** button to filter referrals data by submitted date range(start date and end date).



Referrals | Service Administrators | Referral Team

Search

Submitted Date

Period: Last 30 days

Start Date:

Search name or email

Date of birth:

(dd/mm/yyyy)

Search Clear

Search by Date of birth: Click on **Calendar** to select **Date of birth** or type **Date of birth(dd/mm/yyyy)** -> click on **Search** to filter referrals data by date of birth.

Referrals | Service Administrators | Referral Team

Search

Submitted Date

Period: Last 30 days

OR

Start Date: End Date:

Search name or email:

Date of birth:

January, 2014

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |

Search by entering text as first name, surname and email id: Enter first name/surname/email-id -> click **Search** button to filter data by firstname/surname/emailid.

Referrals | Service Administrators | Referral Team

Search

Submitted Date

Period: Last 30 days

OR

Start Date: End Date:

vis@kazi.in

Date of birth:

(dd/mm/yyyy)

Search Clear

Combined Search: You can perform combined search on submitted date range, date of birth and search text by fill all criteria -> click on **Search** button.

Referrals | Service Administrators | Referral Team

Search

Submitted Date

Period: Last 30 days

OR

Start Date: 01/11/2013 End Date: 22/01/2014

arch

Date of birth: 03/03/1985

(dd/mm/yyyy)

Search Clear

Sort by: Select

| S.No. | Surname | First Name | Email | Date of birth | Submitted |
|-------|---------------------------|---------------------------|--------------------|---------------|------------|
| 1 | arch and then prearch and | arch and then prearch and | manoranjan@kazi.in | 03/03/1985 | 04/01/2014 |

5.5. View referrals details and download their medical records

Click on grid row -> **Referral Details** will be displayed

Referrals
Service Administrators
Referral Team

Search

Submitted Date

Period: Last 30 days Search name or email

OR

Start Date: :00:00 End Date :00:00

Date of birth: / / :00:00
(dd/mm/yyyy)

Search Clear

Sort by: Select

| S.No. | Surname | First Name | Email | Date of birth | Submitted |
|-------|---------------------------|---------------------------|-----------------------|---------------|------------|
| 1 | been approved | been approved | manoranjan@klazina.in | 07/06/1998 | 21/01/2014 |
| 2 | details given | details given | manoranjan@klazina.in | 10/06/1998 | 21/01/2014 |
| 3 | s whose receive iss whos | s whose receive iss whos | manoranjan@klazina.in | 02/03/1988 | 17/01/2014 |
| 4 | Congress on Tuesday said | Congress on Tuesday said | manoranjan@klazina.in | 04/03/1984 | 07/01/2014 |
| 5 | dfbhfg | fhfg | asdfs@dfd.com | 02/05/1985 | 06/01/2014 |
| 6 | ghfgyjhf | dfghf | dgdff@co.in | 02/01/1988 | 06/01/2014 |
| 7 | arch and then prearch and | arch and then prearch and | manoranjan@klazina.in | 03/03/1985 | 04/01/2014 |

User can download medical records by click on the file link:

Please give details of previous pregnancies:

Uploaded medical records ?

| File name |
|---|
| !cid_image005_jpg@01CEF66D__encrypt_14_Jan_21_IUy.jpg |

Back

Use **Back** button to navigate back to **Home** page.

6. Patient Open Portal

6.1. Open URL

Patient has access to URL which will be embedded in the website of the organisation.

6.2. Patient can fill the form

| REFERRING YOURSELF TO THE ROYAL FREE MATERNITY SERVICE | |
|--|----------------------------------|
| To book your pregnancy care with the Royal Free, Please complete this form and submit it. We will endeavour to respond to you as soon as possible. | |
| Surname * | Date of birth * |
| First Name * | Name Prefix * |
| Previous surname | NHS no. (if known) |
| Address * | Email * |
| Post code * | Age |
| Home tel * | Mobile tel |
| | May we text you on this number ? |
| GP Name * | |

6.3. Send the Form

After completing the form, the patient can send the form.

| | | | |
|---|---------------------------|--------------------------|--|
| What was the date of the first day of your last period? | DD | MM | |
| Have you had other babies at the Royal Free? | <input type="radio"/> Yes | <input type="radio"/> No | |
| Please give details of previous pregnancies: | | | |
| Do you want to attach supporting medical records ? | No | | |
| <input type="button" value="Send"/> <input type="button" value="Cancel"/> | | | |

The patient will then appear in the list of Referrals.

7. Appendix

OA: Organisation Administrator

SA: System Administrator

Users: Referrals and users mean the same thing in the system