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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-crumbs
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.

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:

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
2.2. Home screen

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

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.

2.3. Active/Inactive Checkbox

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:

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

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.
Manage a Service Administrator

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

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

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

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

<table>
<thead>
<tr>
<th>S.No.</th>
<th>Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Stuart Cooke</td>
<td><a href="mailto:mail@stuartcooke.com">mail@stuartcooke.com</a></td>
</tr>
</tbody>
</table>

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

**Home / Referral Team List / Update Profile**

<table>
<thead>
<tr>
<th>* denotes mandatory fields</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Email*:</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:matuser@stuartcooke.com">matuser@stuartcooke.com</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Full Name*:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stuart Cooke</td>
</tr>
</tbody>
</table>

- User
- Receive Notifications
- Active

[Back] [Update] [Reset Password] [Delete Referral Team]

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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**

![Patient List](image)

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

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).

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.
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.

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.
5.5. View referrals details and download their medical records

Click on grid row -> Referral Details will be displayed

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

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 Form]

6.3. Send the Form
After completing the form, the patient can send the form.

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