# User Guide Cheat Sheet

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A step-by-step guide to navigate the Isla platform.

# Getting Started on Isla

- Logging into Isla
- Install Isla on your mobile phone

## Managing your Patient List

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- Search for a patient

## Capturing, requesting & sharing data

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- Make a submission, Request a submission, Create a schedule
- Notification of a new photo, video or form
- Share record with another clinician
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- Message the patient
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## Templates and other actions

- Creating a schedule template
- Creating a collection template
- Add a user
- QR code

## **Getting Started on Isla**

#### Logging Into Isla

- You will be sent an invitation to the platform via your NHS email address.
- Copy the link in that email and paste it into your browser and complete the registration process (Google Chrome, Safari, Firefox, Microsoft Edge, not Internet Explorer).
- · You will then receive a verification email.
- Follow the same process with the link in this email.

Note: You will have an option to "Log in with NHSmail" on the Isla log in screen which will redirect them to the NHSMail log in screen

NHS
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To use the NHSmall shared tenant services you must review and accept the NHSmall Acceptable Use Policy (AUP). No action is needed if you have already accepted the AUP.
Sign in with your NHSmall account
Email Address
Password

This is a private computer	
Unlock Account or Forgotten Password? Click he	re.

### Install Isla on your Mobile Phone

If you have an android, you will be asked to download just after you log in on your phone's web browser for the first time.

If you have an iPhone, you can log in via Safari, then go to options and 'add to home screen'.



**Note:** Isla only supports log-ins for clinicians and users with an NHS email address.

Patients do not need to create an account or install the app to use the Isla platform.

### Managing your Patient List

Add a Patient 1.Click the 'ADD PATIENT' button on the top right hand side of your patient list.	<ul> <li>Patients requiring attention &gt;</li> <li>Manually created &gt;</li> <li>Archived &gt;</li> <li>Created by Team</li> <li>Created by Team</li> <li>Select creator &gt;</li> <li>Select team &gt;</li> <li>Include archived patients</li> <li>Created filters</li> <li>Ward</li> <li>Clinic date</li> <li>Description / Assigned clinician</li> <li>Select a clinic &gt;</li> <li>Select ward &gt;</li> <li>Select date</li> <li>Select description /</li> <li>Select a clinic &gt;</li> <li>Archive patient(s) &gt;</li> <li>Create collections</li> </ul>
2. Select the team you want the patient to be added into and enter their DOB and NHS number.	Add a patient Select a team: Demo Team
3. Click " <b>SUBMIT</b> ".	Day * Month * Year *
4. Follow the prompts to add the relevant patient to your patient list.	NHS number * SUBMIT

#### Search for a Patient

You can search for a patient using the search bar on the patient landing screen.

🐥 All patients	>	Search by patient name, NH	S number or hospital number	Q	Hide filters $\checkmark$	+ Add patient	
Patients requiring attention	n >	Created by	Team				You can
Manually created	>	Select creator	✓ Select team	Include archived patients	s	🖒 Reset filters	for patie
Archived	>	Ward	Clinic date	Description / Assigned clinici	ian Clinic type		range of
Response status	D	Select ward	✓ Select date	Select description	✓ Select a clini	c ~	left slide
O No recent response	,	Archive nation((s)	Ca. Create collections				A 1 '
Never responded		Archive patient(s)	E create conections				Archived
Custom patient lists	-	□ Last name †↓	First name †↓ DOB	NHS number Hospital number	Last updated †↓		included
Patients in clinic A today	>	COVERY	Laura 01 Jan 1990	TEST99999	23 May 2023 11	54 🖉	patient li
						-	

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You can see the response status of your patients on the left hand side

- · No recent response: Patients who have a collection with a recent request that hasn't been responded to.
- Never responded: Patients who have a collection from which no requests have been responded to.

You can filter how you want to see your patients on the patient landing screen

You can save any combination of filters as a patient list that your whole team will be able to see

.4. All patients >	Search by patient name, NHS num	nber or hospital number	Q	Hide filters 🗸 🛛 + Add patient
Q Patients requiring attention >	Created by	Team		
Manually created >	Select creator V	Select team V	Include archived patients	උ Reset filters
Archived >	Ward	Clinic date	Description / Assigned clinician	Clinic type
Response status 📀	Select ward	05-22-2023	Select description	V CLINIC A V
<ul> <li>No recent response</li> <li>Never responded</li> </ul>	Archive patient(s)	> Create collections		
Custom patient lists	Last name †↓ Fire	st name †↓ DOB N	HS number Hospital number	Last updated †↓
Patients in clinic A today >	TEST Ta:	sha 01 Jan 2000 64	01 790 9061	18 May 2023 10:47 🧳

The combination of filters can include, clinic date, description, ward and clinic type e.g. patients in clinic A today

## Capture, Request, & Share Data



#### **Create a Collection**

To request data from a patient or upload data to their visual record, you have to create a collection. Collections are folders which contain an episode of care or treatment for that patient.

1. On the home page, select a patient from your patient list. Click "Create new collection".



2. Choose a template name or a team name for your collection.

3. Specify your own collection settings by toggling the "**Show collection settings**" button. Click '**CREATE COLLECTION**'.

	ose a template o	r team for this collection	
		If you are not using a predefined ter	nplate, please select a team
Demo Team		Team name	•
(Example Template) Acne Clinic		Collection name	Ð
(Example Template) Burns			
Si (Example Template) Dermatology			
-	CREATE CI	OLLECTION	
Hide collection settings			
iew submission settings			~
iew request settings			~
iew schedule settings			~
			-

#### Make a Submission

Allows a clinician to upload or capture a photo, video or form.

1.On the home page select a patient from AKE SUBMISSION REQUEST SUBMISSION CREATE SCHEDULE

2. Click "MAKE SUBMISSION".

Confirm submission details

Default notes form (>)

Default form to be completed for this submit

3. Confirm the details of the submission by choosing the media type and attached form (use **"default notes form**" if no specific form).

> X CONSENT WITHELD If you're acting on the best interests of the patient but they aren't able to

provide consent:

✓ GIVE CONSENT IN BEST INTEREST

ote: No data is stored on this device. Instead, it is encrypted and stored in the cloud. This means you submission is securely stored online in a database. For more detail, please review our privacy policy

Capture a clear image

4. Click "CONFIRM".

= |SLA Visual Record

5. Give consent and then capture a photo or select an existing file (you can also add a note after taking or selecting media type).

다 Videos 🗅 Form only 소 Existing files 다 Sound re

6. Add another photo, video or form or go back to the patient record.

**Note**: photos and videos captured through Isla will not be stored locally on your device

Thank you	
You have successfully added to the Isla record	



#### **Request a Submission**

Allows a clinicians to send a request for photos, videos and forms to the patient, carer or guardian.



#### Create a Schedule

You can send differing requests at varying intervals to tailor the schedule to your patients' needs.



The schedule builder will appear, which can be used to create a request timeline (a set of requests due to go out in the future) on the patient.

#### You have the option of:

a) creating a schedule manually (setting any number of requests unique to this patient)

b) using a predefined <u>schedule template.</u>



Once you've created a collection on a patient profile, you can set a new schedule on a patient using the 'Create schedule' button.

Schedule Builder	×
Request Timeline 📀	Guidance -
To populate the timeline, well the example item to be the schedule to start from scretch to the schedule to start from scretch to the schedule to start from scretch to the schedule to sc	Use the schedule builder to create a request timeline for a patient. The schedule builder allows you to plan and preview when this patient will receive nequests for a submission, thoughout their globed of care. 1. Apply space-offend schedule mergisto to your patient. Schedule templates are set by your team, vibil your team page to view. or 2. Build or edit a schedule manually, by adding individual itercial to the timeline one-by-one. Note, you can add individual items on top of your schedule templates.
+ Add item(s) to schedule	
Apply schedule template	
Clear schedule	Confirm schedule

#### Build or edit a schedule manually

To create a bespoke schedule for a patient, click the '**Add item(s) to schedule**' button.

When creating a schedule manually on a patient record, you can add requests one at a time, or send the same request more than once.

Each request is fully configurable, including the method of delivery, the type of data requested, and whether a reminder text should be sent.

You can delete or edit individual requests along the timeline.

You can edit a patient's schedule in this way at any point along the patient's timeline, even if the schedule has already begun.

#### Using a schedule template

Instead of creating a schedule individually on a patient, you have the option of applying a schedule template to an individual patient's collection by clicking the Apply schedule template button.

This option has the benefit of using pathways standardised at a team level, allowing all users in a team access to predefined schedules.

Isla Hospital	Admin Patients Appointments outmissions bry teams
Schedule Builder	×
Request Timeline	Use the schedule builder to create a request timeline for a patient.
To populate the threatine, while the example free before or chear schedule is start from schedul	The schedule builder allows you to plan and preview when this patient will receive requests for a submission, thoughout their registed of ears. 
+ Add Rem(s) to schadule	
Apply schedule template	
Clear schedule	
	1

On selecting a schedule template from the dropdown, choose a start date to view a



longitudinal preview of your schedule, including dates the requests will be sent. You can also add additional ad-hoc requests on top of a schedule.

**Note**: applying a schedule template onto a preexisting schedule will remove any requests that had previously been set to go off in the future on that collection.

#### Notification of a New Photo, Video or Form

1. When a new piece of data is submitted to the patient record an orange bell will appear next to the patients name in the patient list, and next to the collection to which the image has been submitted.





2. To remove a submission alert (orange bell) click 'new submissions reviewed' and 'confirm'.

3. To receive a notification of a submission, enter your email address into the box when creating a collection.

4. If you have created a collection and want to add your email address you can click on 'edit collection details".

mail address to be	alerted for new submissions:	
hm@islacare.co.u	k	
Multiple emails can be a	added separated by commas(,)	
	Hide collection settings	
	View submission settings	v
	View request settings	v
	View schedule settings	v
	CREATE COLLECTION	C

#### Share Record with Another Clinician

On the patient profile you can share record with another clinician. They will then be able to see a view only version of that patient profile.

Note: you may only share a record with clinicians with a NHS email address.

SLA Visual Record			Admin	Patients	Patients (new)	Submissions	My teams	θ
Hanna	ah		Ph	one:	н	ospital number	: er658ff6f656	5
C Edit contact consent	<u>Copy patient link</u>	hare record with another clinician	<ul> <li>Archive patient</li> </ul>					

#### **Bulk Actions**

1.From your patient list you can create a collection from a template or archive many patients at once.

2. Select the patients from your patient list using the tick box.

3. Click 'CREATE COLLECTIONS' or 'ARCHIVE PATIENTS'. Once the patients are selected, press 'Create Collections'.

ARCHIVE PATIENTS		ECTIONS					
Select Last name	First name	Date of birth	NHS number	Hospital number	Last updated 🕹	Submission for review?	Active schedule?
	Gabi	29/Oct/2020	123 456 7890	987654321	Mar 22, 2022	P	⋗
MCCONKEY	Hannah	01/Dec/2022		er658ff6f6565	Mar 22, 2022		>

#### Data Review





2. Click on '**Generate PDF**' to download the page as a PDF, with or without comments and communication.

3. Select 'EMAIL TO PATIENT', 'SAVE TO EPR', 'PRINT', or 'DOWNLOAD' the pdf selected.



#### View Graph of Form Responses

1.On the patient profile you can view a graph of form responses (if requested).

2. Select the form you want to see

on the graph.

UAS7 • UAS7 • UAS7



3. From the drop down you can select which score from the form you want to view.

COLLECTION SETTINGS

#### **Compare Submissions**



#### **Patient Communication**

#### **Message the Patient**

On the patient profile you can add a comment, and reply to patients under 'MORE ACTIONS'.

**Note**: patients will not be able to reply to your message, this is a one-way conversation.



#### Sending Resources to Patient

You can store videos, images, and pdfs in Isla and send them to your patients, through text or email messages, further supporting care of patients at home.

**Note**: As the links do not require patients to log in or authenticate for access, no patientidentifiable information should be included in the resources.

				Admi	n Patients Appointments	Submissione My teams
Select from your teams	¢	Demo Team	/			
Users	54	+ ADD RESOURCE				
Patients	26	This is the Broay for your la	am's images videos, and PDFs that ca	he sent to patients. Besour	rus from this library are sent via an out	nen link and can be viewed and
Templates	155	downloaded, so please ens	ure no patient-identifiable information is	contained in them.		
Responses	6	File name	Description	File base	Last updated	Action
Forms	227					
Audit logs		the_world	A demo video of the world spinning	g video/mp4	20:22 20/10/2022	00/
Interoperability configurations		fowers.jpeg	A flower image!	image/goeg	12:06 07/10/2022	12 TO 🖌 🛢
Resource library		fowers.jpeg	Flowerst	image/peg	11:52 07/10/2022	00/
					have per page: 10 💌	1-343 (< > >)

#### View or Upload a Resource

 To view the resources available on your team, or to upload a new resource as a team admin, click on 'My teams' in the header menu and select the relevant team, then navigate to the 'Resource library'.

**Note**: Resources should be named clearly, and a patient-facing description may be added. If an existing resource is edited and replaced, any patients who received a link prior to the replacement will now be redirected to the new resource (no need to send a new link!)

#### **Send Resource to a Patient**

2. To send a resource to a patient, navigate to the patient's record.

3. Click '**More Actions**' and select 'Message the patient'.

4. On clicking '**Attach a file**', you will be able to select resources from the team assigned to that collection (You can only select and send one resource at a time).



The patient will receive a text or email message including the link to the resource. The link will not expire, so patients will be able to view the resource sent to them until it is deleted from your team's resource library.

#### **Enhanced Consent**

Clinical users can request additional consent (enhanced consent) from patients to use their submissions for teaching or research purposes. This can be done entirely from the patient record.



The form contains a table with checkboxes for each level of consent, allowing the patient to decide which of the selected images they want to give enhanced consent for.

note 5

Created et. 10 Dec-2021 10:50 Submitted by: tommy@islangre.co.uk

Consent for publication

Consent for teaching

Notes:

1.Select images from a collection you want additional consent for.

The patient will receive a text message and an email. The text will contain the code to unlock a PDF, and the email will contain the locked PDF containing the images that were selected by the clinician and a link to a form detailing the images selected.

Review	request for consent	
You have been requested by the clinics	an to give enhanced consent for some selected i	mages.
The images are available for you to see in the encrypted PDF which has been sent to y	is attached to the email you have received, note you your mobile phone to access this PDF.	a will need the security code which
Please review the images listed in the table below and confirm whe	ther you are happy to give additional consent for the	se images using the checkboxes.
Select	For Publication	For Teaching
Image   Captured at: 10.49 16/12/2021		
mage   Captured at: 10:50 16/12/2021		
Image   Captured at: 10:50 16/12/2021		

The corresponding entry card on the collection in Isla will display a **"Consent for publication**" and or **"Consent for teaching**" message.

### **Templates and Other Actions**

#### Creating a Schedule Template

		Admin Parlands Submissions by hains Q Lans
Select from your teams	¢	Demo Team
Users		+ ACO TEMPLATE
Patients	•	Schedule templates are a limeline of requests to be sent to patients. They may include a variety of request data types (including photos, videos, and form) with no maticitizes on the behavior requests and reflective templates.
Collection templates	•	(Pow my
Schedule templates	0	Default *
Responses	0	
Forms	0	
Audit logs		
Interoperability configurations		
Resource library		

Schedule templates are designed to be used as predefined request timelines, applicable to patients in a given cohort. They are defined at a team level, and can be applied to any collection in that team.

1.To find the schedule templates on your team, navigate to your team's library and click Schedule templates.

2.To set a new schedule template, click the "Add template" button, choose a name, and add your request timeline.

3.Choose a name that will be understandable to all members of your team.

Low risk monitoring pathway          Request Timeline         Image: Series of the second assessment form         Image: Second assessment form         Im	Schodule a submission request How frequently would you like to eand this request? Once More than ence	×
+ Add Item(4) to schedule	Cancell	Confirm

**Note**: that 'Day 1' refers to the day that the schedule begins on a patient. At this stage, specific dates have not been set.

Salact form your taxess  Cubers Cuber	Salect horn your taxes  Cuers	to patients. They may halve a work of anyone data types including patients, where we terms when patient at twee twee to have been service and a significant to colorizate and collection temperature.
Ukrs     1       Patients     0       Collection regulates     5       Collectio	Uars 1 Palets 0 Construction marketing of the series of th	to patients. They may include a versity of request data types (including photos, valore, and terms with no parties at two most 50 habits temptates can be applied to collection and collection temptates.
Patients 0 Schedule templates 0 Schedule t	Patients 0 Collection tempiates 0 Schedule tempiates 0 Forms 0 Callection tempiates 0 Collection tempiates 0 Colle	to patients. They may include a variety of request data types (including photos, videos, and formi) with no paties at a team level. Schedule temptates can be applied to collections and collection temptates.
Collection templotes 0	Collection templates 0 Schedule templates 0 Schedule templates 0 Default Terms 0 Lat Under	praces at a mean week, botwedue tempares can be appred to conections and conection tempares.
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Depondes         D           Forms         D           Audit logis         Lee real monitoring gamesy           20:08 2011/0022         user         20:08 2011/0022	Responses 0 Forms 0 Last Updated	
Forms O Let Solver C Owner by Dob 2011/0022 war 2008 2011/0022	forms 0 Last Updated	
Audit logs Low risk monitoring pathway 20.08 2011/2022 user 20.08 2011/2022		Created by Created at
	Audit logs Low risk monitoring pathway 20:08 22/11/200	022 weer 20.06.22/11/2022
there per page 19 V 1-141 12 2 3	nteroperability configurations	Terra per page 10 - V - 1+1+11 - 12 - 2 - 31
tesource library	lesource library	

4. Once you've finished creating your schedule template, you'll see it appear in your team's list of schedule templates.

**Note**: This will be accessible to all members of your team.

#### Using a schedule template in a collection template

1.Schedule templates can be used on an individual patient level, as we've seen above, as well as in collection templates.

2.To set a schedule on a collection template, you should apply a predefined schedule template.

ISLA No Monghia		Admin	Patients	Submissions	My teams	€ Lars
Wound monitoring 🖌						
Set template settings						
View submission settings						¥
View request settings						Ŷ
Hide schedule settings Prese select a schedule tempiate:						^
Select a template						~
Low risk monitoring pathway						
	UPDATE TEMPLATE					

#### **Create a Collection Template**

Welcome

1.On the home page click on '**My teams**'.

2.Select which team you want to add a template to.

Select from your teams	• •	Demo Team
Users	40	+ ADD TEMPLATE FOR COLLECTIONS
Patients	33	Please select a template to view/edit or create a new one.
Collection templates	188	Show only
Schedule templates	39	Collection templates
Responses	6	Name
Forms	323	
Audit logs		Surveillance (starting with Pad)
Interoperability configurations		Surveillance Demo Template
Resource library		Tissue Viability < <enter anotomical="" part="">&gt;</enter>
		Community Stoma Management

	Isla Hospita NHS Trust
$\checkmark$	
	3. Select ' <b>Templates</b> '.
DNS	3. Click 'ADD TEMPLATE'.
reate a new one.	4. Create a template name and select ' <b>CREATE</b> '.
	5. Fill in the required information

Patients Subm

is Myte

Add a User

AUU U USEI		
		Admin Patients Submissions My teams 😝
1.On the home page click on ' <b>My teams</b> '.	Welcome	Isla Hospital NHS Trust
SLA Visual Record	Patients Submissions My teams	• 2. Select which team you want to add a user to.
Deflect Jeann Users 30 Datiante 49		<ol> <li>Click 'ADD USER'.</li> <li>Add NHS email addresses</li> </ol>
Invite a colleague		of your colleagues and click ' <b>INVITE</b> !'.
name@nhs.net	INVITEI	Only users in your clinical team may be added to Isla.

## Using QR code to submit to patient record

1. On the patient's profile, click on 'REQUEST SUBMISSION'





2. Confirm your request for submission of photos, videos, forms or sound recording. Then click on '**QR code**' as a contact method. Click on '**Confirm**' and a QR code will appear ready to submit to the patient record.

Confirm request datal		
Sonnirm request detail	5	
Submission of:		
Photos     Videos	Form only     GN Sound recording	
orm to be completed for th	is submission:	
Default notes form (8)		Show selected form
ontact method:		
. Text message	mail 82 QR code	
This will concrate a OP	and that you can show to the patient, so they can submit now	
Contras ann Generard a 666	one that you can allow to the patient, at they can address them	
		Cancel Confirm
	Scan QR code below to submit to this collection	×
	<b>同務5</b> 3回	
	C325 E.~6443	