FOOD ALLERGY FIX

Clinicians

Quick Reference Guide

Contents

The Inbox

The Inbox is the hub of managing patient care. Each time a patient logs an action on the mobile app, a notification is logged in the Inbox. From here, you can review, acknowledge and follow up on notifications. The Inbox is a complete historical list of activities, with new notifications added to the top of the list. When someone opens and closes a notification, the notification is marked as read. You can also mark items as read manually. On the Dashboard, the Inbox icon lets you know how many notifications need to be read.
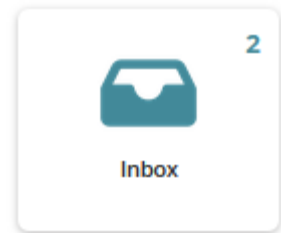
Note that reading a notification and Acknowledging or Approving a notification are not the same. The Inbox list identifies the "read" status. If you exit a notification without acknowledging or approving the event, the notification is still updated as Read.

Filtering the Inbox

If your practice has a lot of patients and clinicians, you may have a lot of Inbox activity. Use the page controls in the lower-right corner to control the number of items listed and to page through the list. You can also use the filter to shorten the list or look for particular kinds of notifications.

1. Click the **Filter** button to begin.
2. Complete one or more of the filter criteria.

- **All:** Use this criterion to find only Read or only Unread notifications.
- **From/To Date:** Use this criterion to find notifications that came in during a specific time period.
- **Task:** Use this criterion to find a specific kind of notification, as shown above.
- **Keyword:** Use this criterion to find notifications that contain a certain word. This is helpful when looking for notifications not included in the Task list. For example, use "protocol" to
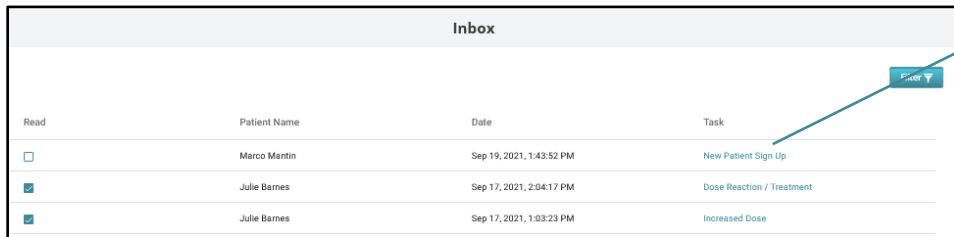
find notifications of changes to your practice protocols, or enter a patient's first or last name.

3. Click the **Search** button to apply your filter. Note that, if you enter more than one criterion, the Inbox will display all notifications that meet *any* of the criteria.

New Patient Setup

When a new patient submits an account request on the mobile app, they select your practice and their provider. You must accept (or decline) the account request, approve the patient's emergency plan, and define their protocol before the patient can begin using the app.

1. In the Inbox, click New Patient Sign Up in the Task column.

Click New Patient Sign Up

2. At the New Patient Sign Up page, click **Approve & Go To Emergency Plan**.

3. The emergency medication information the patient provided when they submitted their account request is displayed. Make any needed changes by clicking the drop-down arrow on each medication type and selecting the appropriate dose for this patient.

When the new patient's emergency plan is correct, click **Approve and Go To Assign Protocol**. An alert is sent to the patient's phone letting them know their account has been approved.

4. At the Assign Protocol page, complete each of the fields as described below. This information is used to present instructions and information to the patient when they administer a dose in their protocol.

- **OIT/SLIT:** Select the type of immunotherapy protocol this patient will receive.
- **Protocol:** Click the drop-down arrow and select from the active OIT or SLIT protocols available for your practice.
- **Starting/Current Dose:** Click the drop-down arrow and select the dose in the protocol that the patient should start with. This may not be the first dose for patients who began the protocol before installing the mobile app. Click **Confirm**.
- **Observation Time:** Select the length of time the patient should watch for reactions after taking a formulation dose. This controls the timer in the mobile app used to prompt the patient to log their reaction.
- **Dosing Frequency:** Select how often the patient should administer a dose in the protocol. This controls reminders that are sent to the patient when they are due to administer a dose.

5. Click **Assign Current Selection**. An alert is sent to the patient's phone letting them know their protocol is assigned and asking them to sign in and begin logging their doses.

6. The Assign Protocol(s) page is updated to show the protocol you just assigned to the patient on the right. You can repeat steps 4-5 to add another protocol, if needed.

7. When all of the patient's protocols have been defined, click the **Back** button.

Patient Protocol Notifications

When the patient changes their dose, experiences a reaction, or changes the medications in their emergency plan, notifications are sent to the Inbox. These must be acknowledged or approved by a clinician. In some cases, you will need to review the patient's calendar or call the patient to get more information about their action. In other cases, you can simply acknowledge or approve the action.

Patient notifications fall into three categories: dosing notifications, reaction notifications and medication change notifications. Each of these is detailed below. Note that you may receive multiple notifications for the same dosing event. For example, if the patient reduces their dose and has a mild reaction, you will receive a Reduced Dose notification and a Dose Reaction/Treatment notification. Both should be reviewed and acknowledged.

All notifications are logged in the Inbox, with the most recent notifications at the top. To review or acknowledge a notification, click the link in the Task column, as shown below.

- **Dose Reaction/Treatment Notifications** are sent whenever a patient logs a mild or severe reaction to their treatment.
  1. In the Inbox, click the **Dose Reaction/Treatment** Task.

2. The Treatment Details page shows information about the patient's reaction and treatment, including the time of the dose, the time of the reaction, and the time of the treatment.

3. To review the patient's dosing and reaction history, click the **Go to Patient Calendar** button. Click **Back**.
4. Click **Acknowledge & Close**.

- **Dosing Notifications** are sent when the patient skips, adds, increases or decreases the dose prescribed in the protocol. Each type of notification is different, but they all include basic information about what the patient did with their dose.

1. Click the **Skipped, Increased, Decreased**, or **Manual Dose** Task.
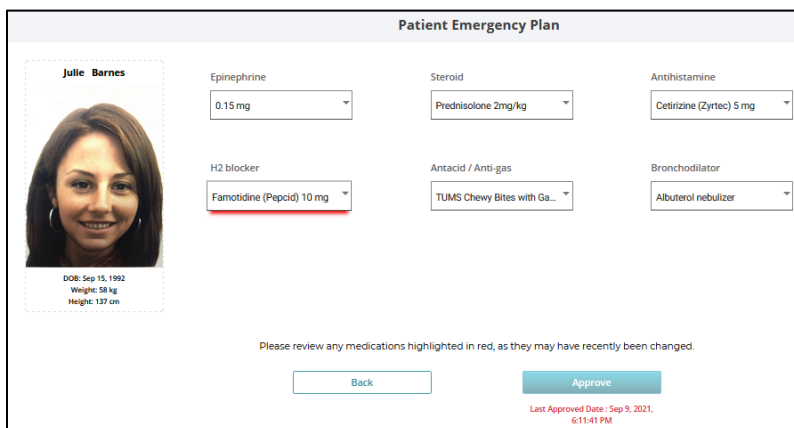2. The Dose page shows information about the patient's dosing session. For increased, decreased or manual doses, the notification shows the amount taken. For skipped doses, the reason is given.

3. To review the patient's dosing and reaction history, click the **Go to Patient Calendar** button. Click **Back**.

4. Click **Acknowledge & Close**.

- **Medication Change** notifications are sent when the patient changes the medications in their Emergency Plan in their app.

    1. In the Inbox, click the **Medication Change** Task.

Notification Task
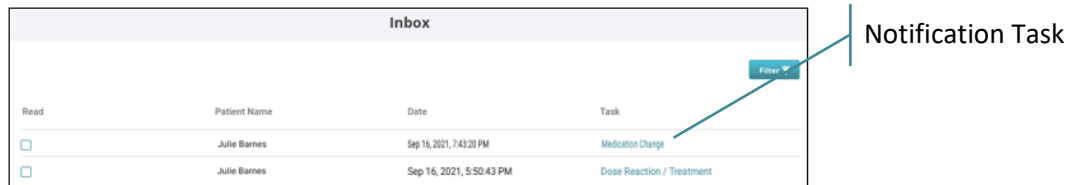
    2. The Patient Medication Plan shows the changes that the patient made to their Emergency Plan in the mobile app, highlighted in red.

    3. Approve the change, if appropriate. An alert is sent to the patient letting them know of the approval.

Patient List

The Patient List is a complete roster of all current and prior patients who have used the mobile app. The list shows the name, gender, age, weight and status of each patient. From this list, you can activate/inactivate a patient, as well as view and/or update the patient's Emergency Plan, Assigned Protocol, and Patient Calendar. You can filter the list or export it, as needed.

Activate/Inactivate Patient

View Patient Data

Filtering the Patient List

If your practice has a lot of patients, use the Filter option to look for a specific patient or to find all patients using a specific protocol.

Filter

1. Click the **Filter** button.
2. Complete one or both of the search criteria:
   - **Name:** Enter the patient's first or last name.
   - **Protocol:** Click the drop-down arrow and select a protocol.
3. Click **Search** to display a list of all patients who meet your search criteria. If you enter both name and protocol criteria, the list displays only patients who meet *both* criteria.

Exporting the Patient List

Use the Export option to create a .csv file containing the full Patient List.

1. Click the **Export** button at the top of the page.
2. When prompted, choose whether to Save the file (as a .csv file in your Downloads folder) or browse to a program you want to open it with, such as Excel.

3. Once the file is open, you can continue to work with it as needed, as shown below. Note that the Patient List export contains different information than that shown in the portal's Patient List.

	A	B	C	D	E	F	G	H	I
1	Active/Inactive	Last Name	First Name	AKA	DoB	Gender	Protocol Name	Last Logged Dose	Last Logged Dose Date & Time
2	Active	Mantin	Marco		27-May-02	M	Treenut SLIT	1a-Green Solution (mcg) 1 pump(s)	9/19/2021 17:10
3	Active	Barnes	Julie		15-Sep-92	F	Palforzia (Peanut)	1a-Peanut flour (0.5mg) 1 capsule(s)	9/17/2021 13:03

Emergency Plan

The Emergency Plan lists the different kinds of medications that the patient is instructed to administer when having a reaction to a protocol dose (as defined in the Action Plan). Clinicians can change these medications or review and approve changes made by the patient in the mobile app. If you make a change, an alert is sent to the patient's phone to let them know.

Assigned Protocol

The right side of the Patient Assigned Protocol(s) page shows the current protocol(s) assigned to the patient. The left side allows you to add another protocol, if needed.

To **add** a protocol:

1. Complete the fields on the left side of the page:
   - **OIT/SLIT:** Select the type of immunotherapy protocol this patient will receive.
   - **Protocol:** Click the drop-down arrow and select from the active OIT or SLIT protocols available for your practice.
   - **Starting/Current Dose:** Click the drop-down arrow and select the dose in the protocol that the patient should start with. This may not be the first dose for patients who began the protocol before installing the mobile app. Click **Confirm**.
   - **Observation Time:** Select the length of time the patient should watch for reactions after taking a formulation dose. This controls the timer that begins in the mobile app when a patient logs a dose.
   - **Dosing Frequency:** Select how often the patient should administer a dose in the protocol. This controls reminders that appear in the mobile app when it is time to take a dose.
2. Click **Assign Current Selection**. The protocol is added to the right side of the page, and an alert is sent to the patient's phone letting them.
3. You can repeat steps 1-2 to add another protocol, if needed.

To **delete** a protocol:

1. Click the delete icon 🗑 and then click **OK** when asked to confirm the deletion.
2. The protocol is removed from the right side of the page and an alert is sent to the patient's phone letting them know of the change.
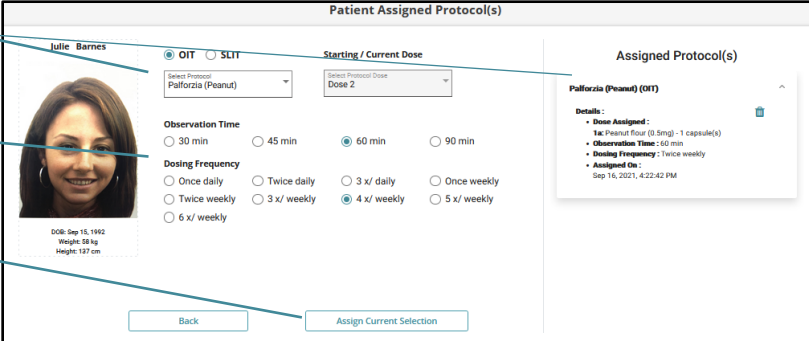
To **edit** an assigned protocol:

1. On the left side of the page, select the OIT/SLIT designation for the assigned protocol you want to change.
2. Click the drop-down arrow and select the protocol that is already assigned to the patient.


3. Complete the following fields, changing the values that are currently assigned, as shown on the right side of the page:

- **Starting/Current Dose:** Click the drop-down arrow and select the dose in the protocol that the patient should start with. This may not be the first dose for patients who began the protocol before installing the mobile app. Click **Confirm**.
- **Observation Time:** Select the length of time the patient should watch for reactions after taking a formulation dose. This controls the timer that begins in the mobile app when a patient logs a dose.
- **Dosing Frequency:** Select how often the patient should administer a dose in the protocol. This controls reminders that appear in the mobile app when it is time to take a dose.

4. Click **Assign Current Selection**. The assigned protocol on the right side of the page is updated to show the new values and the date of assignment.

Patient Calendar

The Patient Calendar is a visual log of the patient's dosing and reaction history. The key on the right side of the page lets you easily identify what the patient is doing and experiencing in their treatment over time: the symbol (checkmark, up and down arrow, or "M") identifies the patient's dose, while the color identifies their reaction. If the patient has multiple protocols, use the protocol selector to view another calendar.
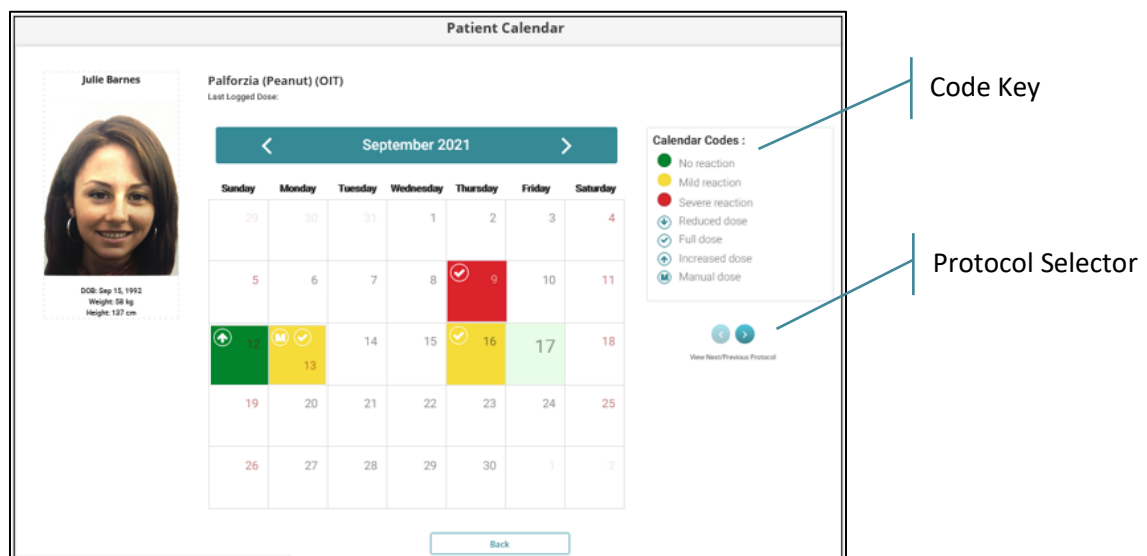
Practice Info

The Practice Info allows you to review and export a history of one or more patients' dosing, reaction, and treatment history. This is useful when you need to produce a record to attach to a patient's chart or submit for insurance reimbursement. Each time a patient logs a dose on the mobile app, an entry is logged at the top of the Practice Info list. Each log entry shows the patient, protocol and provider, along with details on the dose (formulation and time), reaction and symptoms, and treatment (medication and time). This is a detailed log of the same information shown in the Patient Calendar.

Filtering Practice Info

Over time, the Practice Info will contain a lot of entries. You can use the page controls in the lower-right corner to control the number of items listed and to page through the list. You can also use the filter to look for log entries for a particular time period, patient, or protocol.

1. Click the **Filter** button to begin.
2. Complete one or more of the filter criteria.

- **From/To Date:** Use this criterion to find log entries for a specific time period.
- **Patient Name:** Use this criterion to see the dosing history of a particular person. You can search by first or last name, and you can use partial values.
- **Protocol:** Use this criterion to find all log entries for a specific protocol.
3. Click the **Search** button to apply your filter. Note that, if you enter more than one criterion, the Inbox will display only log entries that meet *all* of the selected criteria.

Exporting Practice Info

Use the Export option to create a .csv file containing the Practice Info.

1. Click the **Export** button at the top of the page.
2. When prompted, choose whether to Save the file (as a .csv file in your Downloads folder) or browse to a program you want to open it with, such as Excel.
3. Once the file is open, you can continue to work with it as needed. The information in the download file is the same as that shown on the portal's Practice Info.