# Protocols

*User Guide*

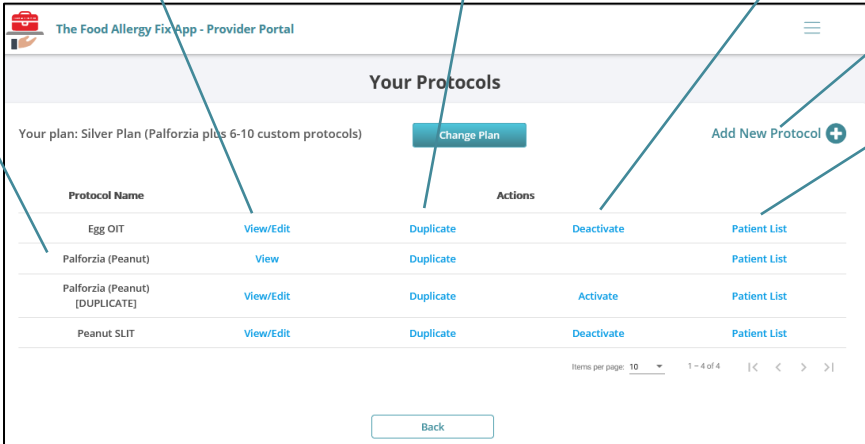# Contents

## Protocols

A protocol is the set of dosing rules for each type of food allergy you administer to your patients. Each protocol is a list of sequenced doses of a particular formulation, quantity and unit. All plans come with the Peanut (Palforzia) protocol. If you have the Bronze, Silver or Gold Plan, you will add the other protocols administered by your clinicians. The number of active protocols that you can have is determined by your plan. You can copy the Peanut (Palforzia) protocol and make changes to the copy to create a new protocol, or you can add a new protocol from scratch.

## Your Protocols

The Your Protocols page is a list of all of your protocols. For your convenience, your plan information is also given, showing the number of active protocols you can have in your plan. From this page, you will manage all of the protocols used in your practice – you will add new protocols, copy or edit existing protocols, deactivate protocols, or view the patients using any particular protocol.

View or edit the protocol

Make a copy of the protocol

Activate or Deactivate the protocol

Add a new protocol

Palforzia protocol cannot be deactivated or edited

View the patients assigned to this protocol

**The Food Allergy Fix App - Provider Portal**

### Your Protocols

Your plan: Silver Plan (Palforzia plus 6-10 custom protocols)　　Change Plan　　Add New Protocol ⊕
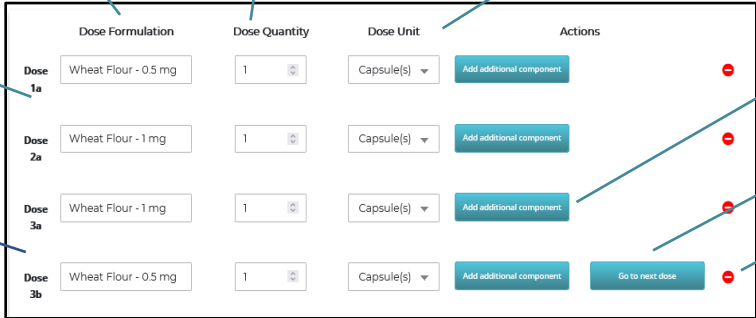
| Protocol Name | | Actions | | |
|---|---|---|---|---|
| Egg OIT | View/Edit | Duplicate | Deactivate | Patient List |
| Palforzia (Peanut) | View | Duplicate | | Patient List |
| Palforzia (Peanut) [DUPLICATE] | View/Edit | Duplicate | Activate | Patient List |
| Peanut SLIT | View/Edit | Duplicate | Deactivate | Patient List |

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## Understanding Protocol Doses

You have a lot of flexibility when setting up your protocols. You will define the amount of each formulation taken at each dose. In some cases, a dose is defined in a single row in the protocol, as shown with doses 1A and 2a, below. If you need to combine multiple formulations to make a dose, you can do that as well, as shown with dose 3a and 3b, below. Multiple components are used when you need to combine units of different quantities (such as a 1 mg capsule and a .5 mg capsule to create a 1.5 mg dose) or to combine different components (such as a walnut capsule and an almond capsule).



**Dose Formulation** – what is being given and how much

**Dose Quantity** – how many units are given

**Dose Unit**– unit being given

**Dose Number** – each unique dose in the protocol

**Dose Letter** – one or more components used in a unique dose

**Actions:**
**Add additional component** – Add another component in the same dose
**Go to next dose** – Add an additional dose
**Delete** a dose component

## Adding a New Protocol

Before adding a new protocol, you should write down each dose in the full protocol, including the formulation, unit and quantity of each component and dose. The information you enter here displays to patients when they administer their doses and should be clear, detailed, and easy to understand.

1. At the Your Protocols page, click **Add New Protocol**.
2. Enter a unique name for the protocol.
3. Select one of the following to identify the type of protocol:
   - **OIT:** Oral Immunotherapy
   - **SLIT:** Sublingual immunotherapy
4. Complete the first dose:
   - **Dose Formulation:** Enter a descriptive name for the dose formulation. This should be detailed enough that a patient can easily identify it among several possible formulations they are using. It may include the name of the formulation (such as wheat flour or egg white liquid), the color of a suspension or capsule, or the concentration (such as 1:1 v/v solution or 83.3 mcg/ml).
   - **Dose Quantity:** Enter the amount of the formulation administered in this dose. You can type the number in or use the up and down arrows to select a whole number.
   - **Dose Unit:** Click the drop-down arrow and select the unit for this dose.

5. If you need to add a second component to define the full dose, click **Add additional component** and complete the dose formulation, quantity and unit for the second component.
6. When the dose is completely defined, click **Go to next dose** and define the next dose. If the formulation is the same, you can copy and paste the Dose Formulation from the previous dose.
7. Continue adding doses and components until the full protocol is defined.
8. Click **Add** to save the new protocol.

## Duplicating a Protocol

Sometimes it will be easier to copy and modify an existing protocol than to add it from scratch. In this case, you will make a duplicate, and then edit that duplicate, changing the name and doses as needed. Be aware that you cannot insert dose rows into an existing protocol. You can only edit dose rows, add components to a dose row, and add new doses to the end of the protocol.

1. At the Your Protocols page, click the **Duplicate** Action for the protocol you want to copy.
2. When asked to confirm that you want to create a copy, click **Duplicate**.
3. A copy of the protocol is added to the list, labeled "[DUPLICATE]."
4. Click the **View/Edit** Action for the duplicate protocol.
5. At the View/Edit Protocol page, make all needed changes to create the new protocol. (See *Editing a Protocol*, below.)

## Editing a Protocol

When you edit a protocol, you can change any of the existing values, including the name, OIT/SLIT indicator, or any of the Dose Formulation, Quantity or Unit values. You can add a new component to any dose, or delete a dose. You can add doses at the end of the protocol, but you cannot insert a new dose row between existing doses. You can also use the Edit process to create a new protocol by saving your changes as a new protocol instead of changing the original protocol.

1. At the Your Protocols page, click the **View/Edit** Action for the protocol you want to change.
2. At the View/Edit Protocol page, change the Protocol Name or OIT/SLIT indicator as needed.
3. In the dosing rows, make any of the following changes, as needed:
   - Change the Dose Formulation, Quantity or Unit values.
   - Add a component to any dose using the **Add additional component** button.
   - Delete a row using the **Delete** button 🛑. Note that when you delete a row of a dose with multiple components (that is, multiple rows define a single dose), only the selected row is deleted. For example, if you delete row 3a for a dose that has a 3b row, only row 3a is deleted. Row 3b remains in the protocol. On the other hand, you can consolidate a multi-component dose by changing the 'a' row and deleting the 'b' row.
   - Add a dose at the end of the protocol using the **Go to next dose** button.
4. When you have made all of the needed updates, save your changes:
   - To save your changes to the protocol, click the **Save & Override Existing** button.
   - To save your changes as a new protocol, click the **Save as New** button.
5. Click **Close** when notified that the protocol has been added or updated.

*Note*: To exit without saving any of your changes, click the **Back** button and click **Yes** when asked to confirm that you want to go back to the Your Protocols page.
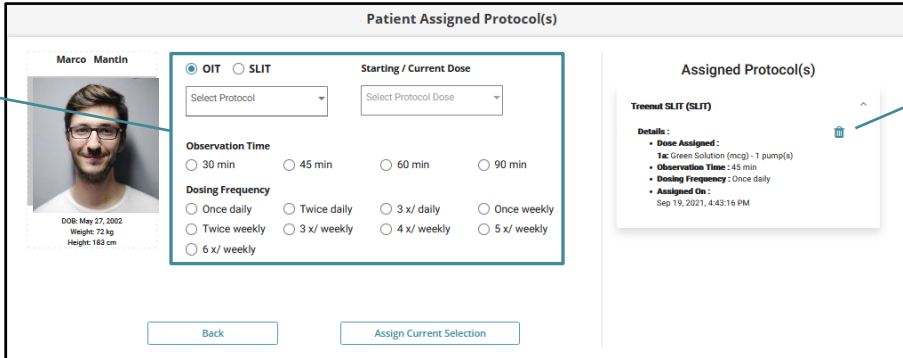
## Activating and Deactivating Protocols

When you create a protocol, it is added as active. This means that it is available to be assigned to patients and is counted toward the number of supported protocols in your plan. If you are not ready to begin using a protocol, or if you want to stop using a protocol, you should deactivate that protocol at the Your Protocols list.

Once you have reached your plan's maximum number of active protocols, you will not be able to add or activate any new protocols. You must deactivate one of the active protocols or change your plan to support additional protocols.

Finally, you cannot deactivate a protocol that has active patients assigned to it. In this case, you must first assign the patients to another active protocol before deactivating the protocol, as described below.

1. At the Your Protocols list, click **Patient List** for the protocol that you want to deactivate.
2. For each patient in the list, click View in the Assigned Protocols column.
3. At the Patient Assigned Protocols, click the Delete icon for the protocol that you want to deactivate.
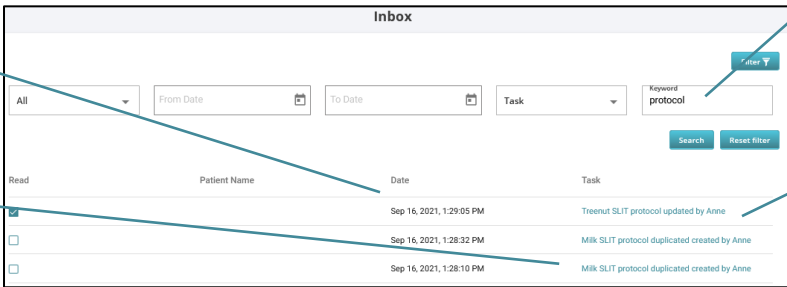
Assign the patient to a new protocol

Delete the protocol you want to deactivate



4. Now, on the left side of the page, add the patient to a new protocol by completing the following:
   - **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 new protocol is assigned.
6. Click **Back**.

7.  Repeat this process for each patient assigned to the protocol you want to deactivate.
8.  When the Patient List is empty, return to the Your Protocols and click the **Deactivate** Action.

## Inbox Notifications

Each time a protocol is added, updated, activated or deactivated, a notification is logged in the Inbox identifying the date and time of the change and the name of the person who made the change. Clicking the Task for one of these entries takes you to the Your Protocols list, where you can locate and review the change if needed.

Filter by Keyword "protocol"

Date and Time of change

Changed protocol and who made the change

Go to Your Protocols list



To easily locate all protocol update notifications, click Filter, enter "protocol" in the Keyword field, and click Search.