

Engage

Version 6.3

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1 Introduction

About this product

Engage is a web based clinical and patient decision support software platform intended to aid in remote communication and care management between patients, their informal caregiver, and healthcare providers.

Engage provides a clear overview of patient's available health information in a single portal. The patient can access this portal, which makes this solution very similar to a personal health environment that is prepared by providers. The Engage portal offers insight into files and treatment progress, like screenings, measure results, make video calls, chat and finally prepare online interventions for the patient, such as treatment modules and self-help programs. With the permission of the patient, informal caregivers, such as a family member providing care, can also take part, because better information and good communication opportunities are essential for them in order to be able to fulfill their role in the care process.

Engage collects, stores, displays, sorts, analyzes, and transfers health related patient information enabling healthcare providers to remotely educate, motivate, and communicate with their patients.

Warnings, Cautions, and Notices



WARNING

WARNINGS are directions which if not followed could cause moderate to serious injury to a user, patient or other person, or could lead to clinical misinterpretation/misrepresentation, and/or loss or damage of patient-related data.



CAUTION

Cautions are directions which if not followed could cause damage to the IT equipment on which the software product is installed and/or other equipment or goods, and/or cause environmental pollution.

NOTICE

Notices are intended to highlight points of attention as an aid to users.

About this document

This *Instructions for Use* is intended to assist users in the safe and effective use of the Philips software product described in addition to the user documentation referred to in chapter “Getting more information” on page 19. The “user” is considered to be not only the body with authority over the software product but also those persons who use the software product.

This *Instructions for Use* does not describe the use of the IT equipment on which the Philips software product is installed. Refer to the documentation of the IT equipment concerned.

Before attempting to use this software product, you must read this *Instructions for Use* thoroughly, paying particular attention to all **WARNINGS**, **Cautions**, and **Notices** it contains. You must pay special attention to all the information given, and procedures described, in chapter “Safety” on page 17. In addition, you must pay special attention to on-screen messages and online help information containing **WARNINGS**, **Cautions**, and **Notices** that may be related to the function being executed.

Throughout this *Instructions for Use*, the following indicators are used to highlight important functionality:

ESSENTIAL This margin text indicates that this chapter describes an essential functionality of the software product.

Important This margin text indicates that this chapter describes a frequently used functionality of the software product.

Bold text refers to a function that is shown as text in the user interface of the software product. This can be a tab, button, or entry field.



WARNING

The chapter “Safety” on page 17 deals with safety aspects and should be read first, before operating this software product.

NOTICE

This document describes the most extensive configuration of the software product, with the maximum number of options. Not every function described may be available.

NOTICE

The screenshots in this document can differ from the user interface screens on details and may not reflect the latest user interface coloring of the product, however this document remains applicable in all other aspects.

Usage of the product

This Philips software product is intended to be installed and used only in accordance with the safety procedures and instructions given in this *Instructions for Use* and for the purpose for which it was designed.

The purpose for which the software product is intended is given below. However, nothing stated in this *Instructions for Use* reduces users' responsibilities for sound clinical judgment and best clinical procedure.

Installation and use of this software product are subject to the law in the jurisdiction in which it is being used. Users must **only** install and/or use the software product in such ways as do not conflict with applicable laws, or regulations which have the force of law.

Use of the software product for purposes other than those intended and expressly stated by the manufacturer, as well as incorrect use, may relieve the manufacturer (or his agent) from all or some responsibility for resultant non-compliance, damage, or injury.

Intended use

Engage is a web based clinical and patient decision support software platform intended to aid in remote communication and care management between patients, their informal caregiver, and healthcare providers.

Engage collects, stores, displays, sorts, analyzes, and transfers health related patient information enabling healthcare providers to remotely educate, motivate, and communicate with their patients.

Engage is intended to support patient populations as determined by the healthcare provider and can be configured to develop specific care plans for patients or populations with health-related risk factors (e.g. hypertension and diabetes).

Engage is an informational tool and does not generate recommendations for clinical diagnosis or treatment decisions. All patient medical diagnosis and treatment are to be performed under the direct supervision and oversight of an appropriate healthcare provider.

Clinical benefits

The clinical benefit of Engage lies in providing accurate medical information on patients, where appropriate, assessed against medical information obtained through the use of other diagnostic options and technologies, whereas the final clinical outcome for the patient is dependent on further diagnostic and/or therapeutic options which could be available.

Contraindications

This software product should not be used if any of the following contraindications exist or are thought to exist:

General contraindications:

- Patient without an active medical professional.
- Patient having mental and/or physical disabilities limiting self-management capabilities leading to not (accurately) performing checks/self-measurements.

Remote Care Management for Hypertension:

- Hypertensive patient with reported self-management or self-monitoring anxiety.
- Patients with dementia or memory loss are contraindicated for this device.
- Patients must have manual dexterity to be able to perform the tests themselves, otherwise a partner will have to be assigned and trained.

Self-check-up diabetes:

- Diabetes patient with reported self-management or self-monitoring anxiety.
- Patients with dementia or memory loss are contraindicated for this device.
- Patients must have manual dexterity to be able to perform the tests themselves, otherwise a partner will have to be assigned and trained.

Weight Monitoring for Heart Failure:

- Heart failure patient with reported self-management or self-monitoring anxiety.
- Patients with dementia or memory loss are contraindicated for this device.

Week Average Blood Pressure:

- It is not advisable to use Home BP monitor to assess hypertension in preeclampsia.
- Hypertensive patient with reported self-management or self-monitoring anxiety.
- Patients with dementia or memory loss are contraindicated for this device.
- Patients must have manual dexterity to be able to perform the tests themselves, otherwise a partner will have to be assigned and trained.

Intended users

In this instructions for use we identify two specific groups of user: professional users and non-professional users:

- *Professional users* are those users who are using the medical device in the course of their work in the framework of a professional healthcare activity, for example medical doctors and nurses. In this document these users are also referred to as (care) providers. The typical environment in which professional users will use this software product is at their office or clinic.
- *Non-professional users* are all those users who do not qualify as professional users, for example patients and informal caregivers. The typical environment in which non-professional users will use this software product is at home.

For general use application:

- For certain patient populations identified by the medical professional, general functionalities to educate or motivate these patients can be used. At the discretion of the medical professional, these include assigning patients to educational content or assigning specific questionnaires based on their medical condition(s).

The Remote Care Management for hypertension software program is intended for:

- Patients with uncomplicated essential hypertension selected by their professional caregivers. uncomplicated essential hypertension is defined as essential hypertension (also referred to as primary hypertension) without organ damages (heart, kidneys, brain, vasculature, and other organs).
- Out-of-hospital patients with congestive heart failure in a stable phase, and can to perform self-management.
- Patients who would benefit from the remote care management workflow (BP monitoring), selected by their medical professional (e.g. diabetes patients).
- The medical professionals with an active care relationship with the aforementioned patients.

The Self-check-up for Diabetes software program is intended for:

- Diabetes mellitus type II patients in a stable phase, selected by their professional caregiver.
- The medical professionals with an active care relationship with the aforementioned patients.

The Weight monitoring for Heart Failure software program is intended for:

- Out-of-hospital patients with congestive heart failure in a stable phase, and can perform self-management.
- The medical professionals with an active care relationship with the aforementioned patients.

The Week Average Blood Pressure software program is intended for:

- Patients, selected by their professional caregiver
- The medical professionals with an active care relationship with the aforementioned patients.

All workflows fitting the framework of Clinically Relevant Health Data Monitoring for specific diseases are intended for:

- Patients with the defined specific disease, selected by their medical professional to be eligible for this workflow.
- The medical professionals with an active care relationship with the aforementioned patients.

Patient target groups

Engage is used solely to support the self-management of patients and their care network and is not meant to be used for therapeutic or diagnostic purposes.

Limitations of use



WARNING

This software product must be operated in an environment where the minimum specified requirements for hardware and network performance are met.

This software product should not be used if any part of the product or system is known (or suspected to be) operating improperly.

System requirements

This software product requires the most recent version of one of the following webbrowsers: Apple Safari, Google Chrome, Microsoft Edge, and Mozilla Firefox.

NOTICE

Microsoft Internet Explorer is not a supported webbrowser for this application.

For optimal use of this software product, the following webbrowser settings are recommended:

- Allow cookies (used for session and log in, no tracking cookies are used);
- No (or as little as possible) add-ons/extensions running in the browser;
- Checking for newer versions of stored pages is recommended to be set to automatic;
- Disk space used for temporary internet files should be set to 50 MB. For performance reasons it should not be set higher;
- Turn on automatic updates of the browser.

Consult the documentation or help functionality of your preferred webbrowser for information on how to implement these settings.

Compatibility

The software product described in this *Instructions for Use* should not be used in combination with other software, equipment or components unless such other software, equipment or components are expressly recognized as compatible by Philips. A list of such software, equipment, and components is available on request from your local Philips representative, or the manufacturer. Philips is not responsible for running compatibility validation of non-supported third-party software.

Changes and/or additions to the software product should only be carried out by Philips or by third parties expressly authorized by Philips to do so. Such changes and/or additions must comply with all applicable laws and regulations which have the force of law within the jurisdictions concerned, and with best engineering practice.

Changes and/or additions to the software product that are carried out by persons without the appropriate training may lead to the Philips warranty being voided.

Philips is not responsible for any malfunction of the software product, if the software product runs on hardware that is not according to hardware specification.

If not supplied by Philips with the software product, Philips is not responsible for any malfunction of the hardware used.

Compliance

This software product complies with relevant international and national standards and laws. Information on compliance will be supplied on request by your local Philips representative, or by the manufacturer.

This software product must be installed on appropriate IT equipment that complies with relevant international and national laws and standards on EMC (electro-magnetic compatibility) and electrical safety. Such laws and standards define both the permissible electromagnetic emission levels from equipment and its required immunity to electromagnetic interference from external sources.

Symbols glossary

The following symbols may appear in the product documentation or on the labels attached to the product.

Symbol	Name	Description
	Manufacturer	Indicates the name and address of the manufacturer
	Date of manufacture	Indicates the date when the device was manufactured.
	Batch code	Indicates the full software release/version number.

Symbol	Name	Description
	Catalog number	Indicates the manufacturer's catalogue number so that the device can be identified.
	Unique device identifier	Indicates the unique identifier of the device.
	Medical Device	Indicates that the device is a medical device.
	Consult electronic instructions for use	Indicates the need for the user to consult the electronic instructions for use. When a symbol is accompanied by additional text, it denotes the location of the instructions for use.
	Packaging quantity	Indicates the quantity of items contained in the product packaging.
	Warning and/or Caution	WARNINGS and/or Cautions are directions which if not followed could cause moderate to serious injury to a user, patient or other person, or could lead to clinical misinterpretation/misrepresentation, and/or loss or damage of patient-related data. Also: This symbol is used on the device label to highlight the fact that there are specific warnings or precautions associated with the device, which are not otherwise found on the label.
	CE Marking of Conformity	A marking by which a manufacturer indicates that a product is in conformity with the applicable requirements set out in European Union's harmonization legislation providing for its affixing.

Training

Users of this software product must have received adequate training on its safe and effective use before attempting to use the software product described in this *Instructions for Use*.

Training requirements for this type of software product will vary from country to country. It is for users to make sure that they receive adequate training in accordance with local laws or regulations which have the force of law. If you require further information about training in the use of this software product, please contact your local Philips representative, or the manufacturer.

In addition to training, tutorial videos are available for select functionality. These videos are accessible by clicking the ? button in the top right of the screen and selecting the **Tutorial Videos** option.

Workplace design

To minimize the risk of computer-related disorders, ensure the workplace is properly designed and provides a good ergonomic working position (e.g., proper working height of chair and desk; screen setup). Observe good working practices; for example, take regular breaks and perform exercises. Alternate work periods at the computer with other kinds of work.

Accessing the Instructions for Use

Obtaining the instructions for use in digital form

The instructions for use can also be accessed from the internet:

1. Go to the following website: <https://www.philips.com.au/healthcare/product/823104/engage-connected-care-empowered-patients>
2. Follow the instructions on the website and select your preferred language.

The pdf file is downloaded from the website and saved to your computer. You can open the file using a pdf reader application. If you do not have a pdf reader application installed, you can download Adobe Reader from the following website: <https://get.adobe.com/reader>

Obtaining the instructions for use in paper form

This *Instructions for Use* is only available in digital form as it is for a cloud-based software product without physical distribution. If there is a need to have the instructions for use in paper form, the pdf version of the instructions for use in the required language can be printed locally by using the print button in the pdf reader application.

If there are no local resources to print the instructions for use, please contact your local Philips representative or the manufacturer to obtain the instructions for use in paper form. Within the member states of the European Union (EU) or European Free Trade Association (EFTA), a paper copy of the requested instructions for use will be delivered within 7 calendar days at no additional cost.



Other Instructions for Use

This *Instructions for Use* relates to the software product herein. However, if other software and/or equipment may be used with the software product, each will have its own *Instructions for Use*.

Errors in the information supplied with the product

If you suspect an error in the information supplied with the software product, for example, in this *Instructions for Use*, you should report the error to your local Philips representative or the manufacturer, for analysis and, if applicable, for correction.

About screen

To display the *About* screen that displays labeling and product information, open the application and login. The *About* screen can be accessed by clicking the ? button in the top right of the screen. Select the option **Information** from the menu to display the *About* screen.

Software updates

Updates for this Philips software product can become available. Such updates are essential to keep the software product operating safely, effectively, and reliably.

Data Accuracy



WARNING

This software product is reliant on the accuracy of the data that is processed by it, whether manually or automatically entered and/or synchronized. In all cases, the medical professional shall use their sound clinical judgment for any decision making that relies on the data offered by the software product and also include other sources of information common to their particular daily clinical practice.

The following can cause inaccurate, incorrect, out-dated, and/or out-of-sync data:

- Data error (entry, processing, follow up, and decision making)
- Human error (interaction & follow up, including knock on effects later resulting from initial mistakes)
- System error (synchronization, connectivity, processing, system errors, and configuration)

2 Safety

Important safety directions

All Philips products are designed to meet stringent safety standards. To safeguard human safety this software product requires proper installation, use and maintenance.

To help ensure the safety of both patients and users, it is vital that you strictly follow all directions under the heading SAFETY and all WARNINGS and Cautions given throughout this *Instructions for Use* and/or displayed on the user interface.

You must also note the following information.

Safety awareness



WARNING

Do not use this software product for any application until you have read, understood and know all the safety information, and safety procedures contained in this "Safety" chapter. Use of this software product without a proper awareness of how to use it safely could lead to moderate to serious injury, clinical misinterpretation/misrepresentation, and/or loss or damage of patient-related data.

Usage and compatibility



WARNING

Do not use this software product for any purpose other than that for which it is intended. Do not use this software product with any equipment or software other than that which Philips recognizes as compatible. Use of this software product for unintended purposes, or with incompatible software and/or equipment, could lead to moderate to serious personal injury, clinical misinterpretation/misrepresentation, and/or loss or damage of patient-related data.

Data security



WARNING

For information about data security, please refer to chapter “Network safety, security, and privacy” on page 57.

Unsupported software



WARNING

Do not install unsupported software on the product system as this could interfere with interpretation/representation, and/or cause loss of or damage to patient-related data, and/or introduce computer viruses.

Display settings



WARNING

Hardware characteristics, resolution settings, and viewing environment all affect the displayed image quality. It is the responsibility of the user to ensure that the displayed image quality is fit for purpose. Incorrect monitor setup can lead to misinterpretation/misrepresentation. Check the display performance regularly.

3 Getting more information

Documentation

There is no additional documentation available for this software product.

Technical support

Should you encounter difficulty using the software product, refer to the relevant user manual for your role (see the section "Documentation" in this chapter) for basic information about the system and follow the guidelines below to locate the relevant source for information and assistance.

- Configuration Settings — Configuration includes the assignment of user permissions and the content of various lists used in the applications. For questions in these areas, consult your organization's application administrator.
- Technical Issues — These issues include backup schedules, network connectivity, and workstation operation. Contact your organization's application administrator.

If you cannot resolve your problem, contact the Philips technical support group serving your area. To obtain contact information for this group, ask your local Philips representative, visit <https://www.philips.com.au/healthcare/product/823104/engage-connected-care-empowered-patients>, or contact us at support.vitalhealth@philips.com.

When contacting Philips technical support, please have the following information available:

- Caller name, customer organization name, and location.
- Product name and version.
- Detailed description of the problem, including any history of troubleshooting efforts completed before or after the problem first occurred.

NOTICE

Any serious incident that has occurred in relation to the device should be immediately reported to the manufacturer or its local representative and also reported to the local competent authority of the European Union / European Free Trade Association member state in which the user and/or patient is established. Reporting in other jurisdictions shall follow the applicable local regulations.

4 General functionality

Getting started

Using Engage as a stand alone solution

ESSENTIAL

To log in to the Engage application, you will need the URL that is specific for your care organization. You will be asked to enter your **user name** and **password** and then click the **Login** button.

In case you have forgotten your password, you can use the **Forgot your password?** link to request a new one.

Using Engage through Single Sign On

NOTICE

Your organization can use Engage in combination with their preferred source system (e.g. a hospital information system).

Access to Engage depends on your source system. In most cases, a special option or button will be available to log into Engage using a single sign on connection. Contact your application administrator for more information.

Home screen

After logging in, you will see either the **My work** or **Patient** screen.

Within Engage, the screens are structured in 2 parts:

1. In the top bar the various sections of the application (**My Work, Patient, Population**) and the menus.
2. The main part is where most of the actions are performed within the various sections.

Menus

Various menus can be found in the top right corner of the screen.

Option	Description
Department menu	If your account is active in more than one department, you can select your current department from this menu.

Option	Description
User menu <i>(Click on your icon to open)</i>	This menu includes your user profile (see chapter “My profile” on page 21), the Audit Log , and the Log Out option.
?	This menu includes Tutorial Videos , Contact Support , and general application Information .
Search	Search for a specific patient. After entering a search query, the result will be shown in a separate panel sliding in from the right side. The search results can be filtered here.

My profile

At **My profile** you can view your own user data, change your security information and settings, and set up an *Out of Office* message.

NOTICE

Check your personal information and contact your application administrator if any of your personal information is incorrect.

NOTICE

The options described in this following subchapters may be not be available for your organization. Contact your application administrator for more information.

Change password

Important

You will need to change your password regularly to ensure that your account remains secure. You will be automatically asked for this when you log in when the validity of your password has expired.

However, you can always change your password if you wish. You can do this by following these steps:

- ▶ Click the option **Change password**.
- ▶ Enter your **Current password**.
- ▶ Enter your **New password** and repeat it in the next field.

The list below the entry fields will show whether your new password meets the security requirements. You cannot use the password until all options have a green check mark.

- ▶ Click **Save** to confirm your new password. Click **Cancel** if you do not want to make any changes.

Security question

NOTICE

When your healthcare organization makes use of two-factor authentication for logging into Engage, the use of the security question will be disabled.

If you have forgotten your password, you can create a new password by answering a security question. For that reason, it is important that you set a security question. You can do this by following these steps:

- ▶ Click the option **Security question**.
- ▶ Choose a **Security question** from the list or select the option **My own question...** to create your own question.
- ▶ Enter the **Answer** to the question.
- ▶ Click **Save** to confirm your security question. Click **Cancel** if you do not want to make any changes.

Out of Office

The **Out of Office** option enables you to notify your patients of your absence when they try to contact you through the application. They will receive an automated reply message when the out-of-office is enabled. You can do this by following these steps:

- ▶ Click the option **Out of Office**.
- ▶ Turn the option **Enabled** on.
- ▶ Enter a **Start** date and time.
- ▶ Enter a **End** date and time.
- ▶ Enter a **Message** that should be shown to the people trying to contact you during your absence.
- ▶ Click **Save** to confirm your out-of-office period. Click **Cancel** if you do not want to make any changes.

Settings

The **Settings** option can be used to set specific options for your user account.

Option	Description
Chat with patient (default value)	This option is used to set the default value for the chat functionality with new patients for your account. This setting does not change the chat functionality for already existing patient relations.

Language

The **Language** option can be used to set the user interface language and locale you want to use for your user account. The dropdown menu will show all available options. For example: the option *English (United States)* will set the language to English and uses US specific localization options.

To apply a new language setting, click the **Save and Logout** button. You will need to log back in for the new settings to be active.

5 My work

At **My Work**, you can see a complete overview of all notifications that have been made for you or your team within Engage regarding patients. These notifications are divided into the multiple categories or tabs. The notifications can be opened directly from these tabs by double clicking on them.

My tasks

ESSENTIAL

The **My tasks** tab contains all tasks that are assigned to you, to any team member, and tasks that do not yet have an owner. It also has archives of both your tasks and the team's tasks.

The **My** category contains all tasks that are assigned to you. When selecting a task from your list, you can see the details or any interaction that is required by you. Choosing **Skip** in the top right will move the task to the **My archive** without completing it.

The **Team unassigned** category contains all tasks that have not been assigned to an individual provider yet. These tasks can be assigned to yourself by selecting them from the list and clicking **Start & assign to me** in the top right corner. Using **Assign**, you can assign the tasks to another team member. Choosing **Skip** will move the task to the **Team archive** without completing it.

The **Team assigned** category contains all tasks that are assigned to any team member, except you. You can still reassign the tasks to yourself or another team member as described above. This can be useful in case a task is assigned to a team member who is unavailable.

To be able to use this functionality, it is important that several care providers be linked in the patient's care team. It should also be taken for granted that a care provider will check in **My Work** very regularly, preferably daily, whether there are still tasks to be taken up.

Appointments

All your appointments are listed on the **Appointments** tab. This screen is the only resource to see all your appointments with any of your patients. For patient specific appointments, see the **Upcoming appointments** block on that patient's **Summary** screen. Any video consult scheduled can be opened directly by double clicking them in the list.

On the right side, your agenda for today will be shown. This will include all your appointments with any of your patients for today.

For more information on scheduling an appointment, see chapter "Upcoming appointments" on page 32.

Chat

NOTICE

To be able to use the chat functionality of Engage, you will need to enable it on patient level. For more information, see chapter “Care network” on page 34.

At **Chat**, all chats concerning your patients are collected. An alert is shown on the chat tab with how many unseen messages you have.

NOTICE

Depending on the configuration of Engage within your organization, you may receive notification by email of new chat messages. Make sure you have a valid email address set in Engage to receive these notifications. You can see how to check this in chapter “My profile” on page 21.

6 Patient



CAUTION

Always make sure that the patient file you are working in is the patient file of your current patient.

Always follow up on actions and activities by means not related to this software product.

Make sure your patient knows how to contact you via other means than through Engage in case they have questions of any kind.

By default, when logging into Engage, the most recently opened patient file is displayed with the **Summary** category shown.



The patient file contains, in addition to the concise personal data at the top, various categories displayed as tabs. Some categories may not be visible because they do not fit on your screen, but they can be accessed via the *expand* button on the right. It is also possible that some parts are not available to you because they are not enabled within your organization.

Adding a new patient (using SSO connection)

To add a new patient to Engage, you will first need to do some actions in your source system. For the purposes of this manual, it is assumed that you are familiar with the operation of your source system.

From your source system, open the file of the patient to be added to Engage. For this purpose, a single sign on (SSO) button or option will be available in your source system. By clicking this button, the patient will be created in Engage and the relevant patient data will be copied from your source system to Engage.

If the patient already exists in Engage, you can usually use the same or a similar button to open the patient file in Engage. Access to Engage depends on your source system. In the case of a source system SSO link, your organization may have chosen to set up an extra notification that asks whether you really want to include the patient. This is an additional confirmation question because inclusion automatically ensures that a patient also receives an invitation e-mail to start using Engage.

Concise personal data

The concise personal data of the patient are shown above the categories in the blue box and are always visible within the patient file. To view or adjust all the patient's personal data, go to the **Demographics** category.

Quick menu



The red quick menu to the right of the personal data can be used to quickly execute a few actions: assign tasks, start a new (video) consults, or set targets and baselines.

Assign task

ESSENTIAL

You can assign tasks to the patient. This can be a specific care path, questionnaire, educational, or intervention item. Follow these steps to assign a task:

- ▶ Click **Assign task** in the quick menu.

☞ The **Assign task** window is shown.

- ▶ Select the type of task above the **Search** field.
- ▶ Choose a task from the list. You can use the **Search** field to search for it.
- ▶ Double click the task to select it.
- ▶ Click **Assign** when all required information has been entered.

☞ The task is now assigned to the patient.

Video consult

You can invite patients for a video consult. These can be used to remotely have face-to-face contact with your patient. Follow these steps to schedule a video consult:

- ▶ Click **Video consult** in the quick menu.

☞ The **Schedule video consult** window is shown.

- ▶ Select which **Professional** will perform the video consult.
- ▶ Enter a **Title** to indicate the topic of the video consult.
- ▶ Set a **Date, Start time, and Duration**.
- ▶ *Optional:* If your organization makes use of its own preferred video consult platform (e.g. Microsoft Teams or Zoom), the **External video URL** field can be used to specify the URL of the video consult. Otherwise, the built-in video consult of Engage will be used.
- ▶ Click **Save** when all required information has been entered.

☞ The patient will receive an invitation to the video consult by email. The video consult will also be visible in both the provider and patient portals.



When you have scheduled a video consult, it will be accessible through the *video consult* button next to the quick menu. Other locations from where you can access the video consult are the patient **Summary** screen (**Video Consult** block) and **My Work (Appointments)**. The button to join the video consult will become visible, but inactive, 60 minutes before the scheduled start time. The button will become active 15 minutes before the scheduled start time of the video consult (until 30 minutes after the scheduled start time).

All healthcare providers who have access to a specific patient's record can join a video consult with that patient, with a maximum of five participants per video consult. During the video consult, the provider can share their screen with the patient if that is needed.



WARNING

Always verify the identity of the patient when using video consult before giving consults on video.

NOTICE

When using the screen sharing functionality during a video consult, make sure you are sharing the correct screen and information. This is important to avoid accidentally sharing any (patient) information that is not relevant to the current video consult.

Targets and baselines

You can set patient specific target and baseline values that are determined about medical measurements. These target/baseline values will be used for the patient instead of the standard values in Engage. The values will also be displayed as a goal for **Measurements**. The baselines can also be used for protocol rules on measurements. Existing patient targets and baselines can be seen in the relevant lists. They can also be edited by double clicking on them.

Patient targets

Follow these steps to set a patient specific target:

- ▶ Click **Targets and baselines** in the quick menu.
- ☰ The **Patient Targets and Baselines** window is shown.
 - ▶ Click **+ New target** to start adding a new target for the patient.
- ⇒ You will need to enter the target information to proceed. All required items are marked with a *. See the table below for more information.
 - ▶ Click **Save** when all required information has been entered to save the target.

Option	Description
Norm Sub norm	Select the relevant (sub)norm from the list for which you want to determine a target.
Norm line	Select a norm line (if applicable).
Lower value Upper value	Set the lower and/or upper values (minimum and maximum). In case both are set, the target will be the bandwidth between the values.
Unit	Select the relevant unit for the value from the list.

Patient baselines

Follow these steps to set a patient specific baseline:

- ▶ Click **Targets and baselines** in the quick menu.

The **Patient Targets and Baselines** window is shown.

- ▶ Select the **Patient Baselines** option at the top.
- ▶ Click **+ New baseline** to start adding a new baseline for the patient.

You will need to enter the baseline information to proceed. All required items are marked with a *. See the table below for more information.

- ▶ Click **Save** when all required information has been entered to save the baseline.

Option	Description
Patient	The baseline will be set for this patient. This field will be automatically filled based on the patient file you have open.
Measurement	Select the measurement type for which you want to define the baseline value.
Value	Set value and unit of the baseline.

Summary

The **Summary** of the patient file contains various blocks (portlets) through which you can quickly gain insight into the various sections within the file. The blocks show a limited set of data that can be viewed in more detail on the relevant tabs. The following buttons can be available in a block:

Button	Action	Description
	Refresh	Click to refresh the data in the block.
	Open	Click to open a more detailed view of the information in the block.
	Add	Click to add a new item to the block.
	Close	Click to close the block.



As a care provider, you can determine the layout of this screen yourself by adding, removing, and moving blocks. Your changes to the layout will be saved automatically. By using the *add portlet* button at the bottom right of the screen, you can add new blocks to the **Summary**. Blocks can be removed with the **x** button. To move a block, hover over the block title and drag the block to the desired position on the screen.

Active protocols

ESSENTIAL

Protocols are a collection of tasks, medical rules, and education items (any combination) related to a medical protocol. When added to a patient file, these protocols will automatically assign the relevant items to the patient and provider when needed. These protocols are configured based on the requirements of the organization by a Philips consultant.

From the block **Active protocols**, you can add new protocols to the patient. To do this, follow these steps:

- ▶ Click the **+** button in the **Active protocols** block.
- ⇨The **Add protocol** window is shown.
- ▶ Click the protocol you want to add from the list. The available protocols depend on the configuration available in your organization.
 Dependent on the protocol you have chosen, you may be asked to enter more information before continuing.
- ⇨The protocol has now been assigned to the patient and is shown in the **Active protocols** block on the **Summary** screen. The protocol will also automatically start.

When double clicking a protocol in the Active protocols block, you can choose to **Stop protocol**. This will remove the protocol from the patient file.

For more information on protocols see chapter “Protocols” on page 43.

Care programs

NOTICE

Care programs that are manually added or edited in Engage will not be synchronized with any connected source systems. Changes will thus only be visible in Engage.

From the block **Care programs**, you can add new care programs to the patient. To do this, follow these steps:

- ▶ Click the **+** button in the **Care Programs** block.
- ⇨The **Add care program** window is shown.
- ▶ Select which kind of **Care program** should be used.
 - ▶ Select the **Care program status**: *active* or *inactive*.
 - ▶ Select a **Date**. By default, this will be the current date, but this can be changed to any other date.
 - ▶ Optionally, enter a **Note** for additional information related to the care program.
 - ▶ Click **Save** to assign the care program to the patient.
- ⇨The care program has now been assigned to the patient and is shown in the **Care programs** block on the **Summary** screen.

Tasks

ESSENTIAL

The **Tasks** block contains three tabs separating tasks assigned to the **Patient**, the care **Team**, and yourself (**My**). The tasks listed show when they are due, what status they have, and to which category they belong (message, education, questionnaire, or intervention). When the due date has passed, the date will be shown in red.



If you want to search or filter the tasks, use the *open* button to access a view of the task list that allows you to search for specific tasks. You can also filter this list based on the task status.

You can open tasks of the type intervention to review the results. An SSO connection will be opened to the content supplier.

When the patient has a task that is due, they will receive a notification by e-mail and, if using the mobile app and notifications enabled, a push notification on their mobile device.

Telemonitoring

The **Telemonitoring** block allows you to see measurements entered by your patient and their informal caregivers and monitor trends in these measurements. This option can be used to assign a care path that supports the patient and care provider in remote monitoring, see the example below where weight monitoring for heart failure is explained.

NOTICE

The telemonitoring functionality is not live monitoring of physiological parameters and measurements, but a generic monitoring of the patient's health based on manually entered measurement data by the patient and/or their informal caregiver. As such, the quality of the data cannot be guaranteed as it depends on the compliance of the patient and/or informal caregiver and the diligence of the care provider.

For a heart failure patient, it is important to keep a close eye on their weight. An increase of 2 kilograms in 2-3 days can be a risk due to the body retaining too much fluid. In such a situation, it is important to seek direct contact with the care provider.

In Engage, the patient can register their weight in the weight measurements overview daily. By assigning weight monitoring tasks in case of heart failure, the patient and the care provider are supported in monitoring the weight. The care path contains the following features:

- The patient receives a task and notification message at 8 am if no weight has been registered the previous day.
- The care provider receives a notification message at 8 am via a review task if the patient has not registered weight via a review task for two consecutive days.
- A dashboard in population management indicates which patients have not registered weight for more than 5 days.
- The patient receives a task and a notification message if at least 2 kilograms increase has been detected in the last 3 days. The patient is requested to contact the care provider directly.

- The care provider will receive a review task if at least 2 kilograms increase has been observed in the past 3 days.

You can add new telemonitoring to the patient's file by following these steps:

- ▶ Click the + button in the **Telemonitoring** block.

☞ The **Assign telemonitoring** window is shown.

- ▶ Select which kind of **Telemonitoring** should be used.
- ▶ Select a **Start date**.
- ▶ Select an **End type**. This is used to determine when the telemonitoring should end: after a specific **Duration** or on a specific **End date**.
- ▶ Dependent on your **End type** choice: Set the **Duration** or **End date**.
- ▶ Click **Assign** to assign the telemonitoring to the patient.

☞ The telemonitoring has now been assigned to the patient and is shown in the **Telemonitoring** block on the **Summary** screen.

Existing telemonitoring activities can be edited by double-clicking on them. This allows you to adjust the **Duration** or **End Date**.

The **Telemonitoring** block also indicates the status of each item: active, scheduled, or completed. The items are sorted according to the start date. Only one may be active at any time per type of telemonitoring.

Patient report

The **Patient Report** block contains information on the patient's activity. It can be used to check if your patient has been keeping up with their assigned tasks.

The block contains the following information:

- Finished versus planned activities in the past 7 days
- Last received patient activity
- Days since last activity

Shortcuts

The **Shortcuts** block contains a preconfigured collection of shortcuts to web-based applications. These applications can be accessed without leaving Engage. They can offer additional patient-related information, general medical information, or any other type of web-based resource.

Upcoming appointments

The **Upcoming appointments** block shows the various appointments with the patient that have been planned. These appointments can be of different types, for example an in-person appointment, a telephone call, or a video consult.

To add a new appointment, follow these steps:

- ▶ Click the + button in the top right of the **Upcoming appointments** block.

- ▶ Enter all the requested information. Items with an * are mandatory.
- ▶ Click the **Save** button when you are done.

The appointment has now been made in Engage. It will also be added to your personal appointments list in **My Work**, see chapter “Appointments” on page 24. The patient will receive a notification by e-mail and, if using the mobile app and notifications enabled, a push notification on their mobile device.

For specific information on the video consult appointment type, see chapter “Video consult” on page 27.

Demographics

The patient's personal data is transferred from your source system (if applicable). On this page they can be viewed and adjusted where necessary. Make sure that in any case the sections **Phone** and **Email** are filled in correctly so the patient can receive messages from Engage.

NOTICE

The personal data modified in Engage will not be sent to your source system. The changes will therefore only be visible in Engage. A special dashboard has been set up in Engage that provides insight into the patients who have changed the data, see chapter “Patient lists” on page 47.

The *Build Full Name* button ensures that the **Full Name** as used in Engage is created. In most cases, this will already have happened when creating the patient file. If the patient's initials are used in the full name, this can be corrected to first name followed by last name via this button.

To fully deactivate a patient file, you click the button **Inactivate** in the **Status** line. You will be shown a warning that explains what will happen when you set a patient file to inactive. To continue, check the notice option at the top and click **Inactivate**. When doing so, the patient will no longer be able to log into Engage, all their open tasks will be automatically cancelled, and the connection between the source system and Engage for this patient will be removed so no more data will be synchronized.

NOTICE

When a patient file needs to be completely deleted and erased from Engage ("hard delete"), contact your local Philips contact or the support department.

User accounts

The **User Accounts** section is used to manage the patient's user account. If the patient does not have an account, it can be created here. In most cases, however, this is not necessary because when setting up Engage within your organization, it may have been decided to arrange this via the SSO link. In that case, the text **Patient Account Active** will be shown.

If a patient has lost its password for Engage, you can reset it using the **Reset password** option in this screen. The patient will receive their new password by email.

On request or when required, a patient's Engage account can be disabled from this screen (**Disable account**). When doing so, the patient will no longer be able to log into Engage, all their open tasks will be automatically cancelled. The patient file itself will stay intact when this option is used.

Care network

The **Care Network** section is used to provide insight into the patient's care team. A treatment relation is required to be able to chat with the patient and receive notifications in **My Work** when the patient has completed certain activities. This screen gives you direct insight into the patient's healthcare team and connected care organizations and allows you to easily add a treatment relation (using the + button). To enable a care provider to access data of a patient there are two options. Which option is available to a care provider is determined by the configuration your healthcare organization uses:

1. The care provider can access all data of patients that are in the same department/ organization, or
2. The care provider is part of the patient's care network and within the same department/ organization, or part of the team that provides care to this patient.

This screen is also used to add personal contacts of the patient. This can be either a family member, legal custodian, or informal caregiver. When adding a new personal contact using the + button, you can choose to either select an **Existing** person or add a **New** person. An existing person can be any contact that is already known in Engage.

When adding a personal contact this way, you can also opt to **Create account** for them. This will enable access to the informal caregiver portal of Engage, which is similar to the patient portal in functionality. All actions taken in that portal will be made on behalf of the patient. The only exception is the chat functionality: these will be strictly between the informal caregiver and the care provider unless the patient is included in the chat.

To enable chat functionality for any person in the care network with the patient, follow these steps:

- ▶ Go to the **Demographics > Care Network** screen of the patient with whom you want to enable chat.
- ▶ Double click the name of the person for who you want to enable chat with the patient.

The information window of that person is shown.

- ▶ Toggle **Chat** on.
- ▶ Click **Close** to confirm and close the window.

The selected person can now chat with the patient in Engage.

Data transfer



CAUTION

The use of Data Transfer should be limited to exceptional situations. Normally, data is automatically synchronized once a day between the provider portal, patient portal, and your source system.

The **Data Transfer** section allows you to retrieve and send data to and from your source system and Engage's patient portal. Which options are available on this screen depends on the setup that is active within your organization.

Device management

The **Device management** section can be used to link measurement devices the patient uses to their Engage file. Device IDs need to be connected to the patient's file in order to link the measurements generated by those devices to that patient's measurements in Engage. The section consists of the following three parts which allow you to set this up:

Interface

The **Interface** section is used to define the primary method the patient uses to access their Engage portal. This is set at **Primary patient interface**. In case a tablet is provisioned by the healthcare organization, the **Device ID** option needs to be filled with the identifier of the tablet given to the patient.

Connectivity

Connectivity defines whether a measurement hub is used to share the measurement data between the device(s) and Engage. Select *Measurement hub* at **Device connectivity** to enable this option and enter the hub identifier in the **Measurement hub ID** field. Otherwise, select *None*.

Measurement

The **Measurement** section contains the actual measurement device(s) the patient will use. For each device used, the **Device ID** will need to be entered. This will allow for measurements that are shared using that ID to be added to the patient's file in Engage.

To add one or more devices used by the patient for measurements, follow these steps:

- ▶ You are on the **Patient > Demographics > Device management** screen.
- ▶ Select the method the patient will use as their primary access to Engage at **Primary patient interface**. Choose one of these options:
 - Patient portal on provisioned tablet*: the patient uses a tablet provisioned by the healthcare organization. Search for and add the identifier of the tablet at **Device ID**.

Patient portal on web browser on PC: the patient uses a PC.

Patient app on smart phone: the patient uses a smart phone.

None: the patient does not use Engage.

- ▶ Select the connectivity method at **Device connectivity**. When selecting *Measurement hub*, search for and add the **Device ID** of the hub.
- ▶ Select the measurements that the patient will use. Add for each relevant measurement the appropriate device, including **Device type** if multiple options are available. Search and add the **Device ID** for each measurement type.
- ▶ Click **Save** at the top of the screen to confirm.

⇒ The relevant devices are now connected to the patient file in Engage and the patient can start using them.



WARNING

Philips only supports selected devices and integrations for use with the Engage mobile app or the measurement hub. Please contact your local Philips representative for details on which devices and integrations are supported. Philips will not be liable for any clinical misinterpretation/misrepresentation or any other issues due to the use of unsupported devices and integrations.



CAUTION

Bluetooth should be enabled in the Engage mobile app and pairing should be checked for transferring data between the mobile device and the measuring device. Disconnection or pairing issues can cause data synchronization issues. This can create issues with recommendations, tasks, and advices.

A Bluetooth connection is not required when using the measurement hub.

NOTICE

Only one Bluetooth device can be paired to and synchronize with a mobile device at any time. If a patient uses more than one measurement device for health monitoring, Philips recommends using the measurement hub. Otherwise, they will need to unpair the current device before pairing with another device. See for more information chapter “Mobile app” on page 54.

Notes

Notes are a useful tool to document any activities related to the patient or to document the status of the patient in a structured way. They include notes to support transitions of care, care planning, quality reporting, and so on. Engage supports recording of notes for patients, as an independent note or in context of related patient activities.

The **Notes** screen shows an overview of all notes that have been recorded for the patient. They can be filtered using the options on the left side by **Categories**, **Keywords**, or **Date Range**.

To add a note, follow these steps:

- ▶ You are on the **Patient** > **Notes** screen of the patient for whom you want to add a note.
- ▶ Click **Add note** in the top right corner.

⇒ The **Add note** screen is shown.

- ▶ Assign one or more **Categories** to the note. You can search by starting to type in the field.
- ▶ Assign one or more **Keywords** to the note. You can search by starting to type in the field.
- ▶ Enter the content of the note in the **Clinical note** field.
- ▶ Click **Save** in the top right corner when you are done.

⇒ You have now added a note to the patient's file.

Notes can also be added using the **Flags** functionality. For more information, see chapter “Flags” on page 47.

Measurements

ESSENTIAL

The **Measurements** screen provides an overview of the various measurements made by the patient. The screen consists of two parts: on the left, an overview of all types that are measured for the patient and on the right the details of the selected measurement type. The type of measurements shown depends on the care programs assigned to the patient.

Measurement types

On the left, you will find the different types of measurements available to the patient. Each type of measurement shows a maximum of the last three measured values in a trend graph. The most recent measurement is also numerically displayed together with the date on which this measurement was recorded.

Details

When you select one of the types, the details of that type are shown. On this screen you will find, among other things, a graph with below it a list of the measured values, a possible target and target value and various options to adjust the display.

Most measured values are shown in a line graph. These can consist of values that have been entered by the patient in the patient portal. However, measurements from a source system or added by a care provider can also be shown in this table. These are called medical measurement values.



In the list, a medical measurement value will be indicated by the icon as shown to the left. Patient self-measurements do not have their own icons.

In addition, the graph can contain a goal or target line/area (as shown in the example). This line/area makes it easy to see where the measurement value is in relation to the target value. For altering target values, see chapter “Targets and baselines” on page 28.

The information displayed can be filtered using the buttons on the top. The < and > buttons at the top left can be used to scroll through time. The selected period is shown next to it. Engage chooses a graph filter based on available measurements. With the buttons **1 w/1 m/3m/1 yr/5 yr** you can switch the graph filter. Alternatively, you can select an area of the graph to zoom in to by dragging a box over it. By choosing between **Medical/All** you can determine whether you only want to show the medical measurements or all measurements.

Add measurement

A measurement can be added manually by the care provider in Engage. To do this, enter the date and time of the measurement and the measured value in the fields below the graph. Optionally, a **Note** can also be added to the measurement. This measurement will be shown as a medical measurement in the list, with the name of the professional.



Manually entered measurements can be deleted from the list. You can do this by clicking on the *delete* button behind the measurement.

Questionnaires

ESSENTIAL

At **Questionnaires**, all completed questionnaires of the patient can be seen and new questionnaires can be assigned or taken directly.

By clicking on a specific questionnaire in the list on the left, the details are displayed (on the right). If a questionnaire has been completed more than once, then depending on the type of questionnaire, a graphical representation can be displayed with the scores achieved. By means of the buttons at the top, the results can be browsed and filtered chronologically. With this, for example, a period of 3 months can be shown.

The details of a specific questionnaire can be viewed by clicking on the **Scores** and **Answers** buttons behind the items in the list below. The questions with the given answers will then be displayed.

Add questionnaire

By using the + button above the list of questionnaires, a new one can be assigned and answered directly together with the patient.

If you want to assign a questionnaire to the patient that they can fill out at home, you will need to assign a care path of the type questionnaire. This can be done through the quick menu option **Assign Task**, see chapter “Assign task” on page 27.

Medications

At **Medication**, the prescribed medication and medical devices/aids are shown that have been manually added by the patient or care provider in Engage. You can manually add by clicking on the + button and filling in the relevant details.



CAUTION

The manually added medication is not synchronized with your source system. The overview is therefore only available within Engage and is intended to give the patient the opportunity to keep a complete overview.

By default, all active medication of the patient will be shown. This list is filterable using the options for **Medications**, **Devices**, and **History**.

Diagnoses

At **Diagnoses**, all episodes and problems known for the patient are displayed, as long as they have a valid ICPC code. The list box on the left filters the data by episodes and problems, and by active or all items.

The details can be viewed by double clicking on an item. This shows, among other things, when the episode/problem was first diagnosed, its history and any notes that were made.

Chats

NOTICE

To be able to use the chat functionality of Engage, you will need to enable it on patient level. For more information, see chapter “Care network” on page 34.

ESSENTIAL

All **Chats** to and from the patient are collected in one overview. With this, you can quickly see the communication history. Clicking on the patient's name will show the conversation history. From here, you can also send a message directly (at the bottom of the screen).



You can use the *attachment* button to the left of the **Type a message** field to send attachments.



New chats with the patient or other people in the patient's care network can be started by clicking on the *new* button. You will first need to select if you start the chat from your personal account or from a functional account (a so called team chat). You will then see a list of all persons who are in the patient's care network and for whom there is not yet an active chat.

You can handle chats at three different places within Engage: the **Chats** tab described here, in **My Work** (see chapter “Chat” on page 25), or in **Population** (see chapter “Team chats” on page 48).

Care plan

The goals and activities entered by and/or for the patient are in the **Care Plan**. You can see when the goals are due and what the current status is of these goals. The finished plans can also be viewed in the **History** section. A new plan can be added with the + button, see chapter “Add plan” on page 40.



Activities with high priority will have a *high priority* icon next to them. This icon will also be shown next to the related care plan in the list on the left side of the screen.

Existing plans, goals, and activities can be modified by selecting them to open the details on the right side of the screen. From here they can also be deleted. Deleting can only be done if there are no goals and activities active within the plan.

Add plan

To add a new care plan, follow these steps:

- ▶ Click the + button.
- ⇨ The **New Plan** section is shown on the right side of the screen.
 - ▶ Enter a **Plan/Mission** for the plan. This will also be the name of the plan.
 - ▶ Optionally, use **Add/Change Classification** to link the plan to a classification. Select an existing classification from the list or click + **Add Problem** to add a new classification for the patient.
 - ▶ Set the status of the plan: *Open, In progress, or Completed*.
 - ▶ Click **Save** in the top right corner when you are done.
- ⇨ The care plan has now been created and is added to the patient file.

The next step is to add one or more goals, see chapter “Add goal” on page 40.

Add goal

To add a new goals to a care plan, follow these steps:

- ▶ Select the care plan to which you want to add a goal.
- ▶ Click the **Add Goal** button at the top.
- ⇨ The **Add goal** section is shown on the right side of the screen.
 - ▶ Enter a name for the **Goal**.
 - ▶ Select a **Status** for the activity.
 - ▶ Optionally, enter a **Evaluate on** date and a **Note**.

- ▶ Click **Save** when you are done.

⇒ The goal has now been created and is added to the care plan.

The next step is to add one or more activities to the goal, see chapter “Add activity” on page 41.

Add activity

To add a new activity to a goal, follow these steps:

- ▶ Click the **+ Add Activity** button at the bottom of the goal for which you want to add an activity.

⇒ The **Add activity** section is shown on the right side of the screen.

- ▶ Enter a name for the **Activity**.
- ▶ Select who should do the activity at **Performer**.
- ▶ Select a **Status** for the activity.
- ▶ Optionally, enter a **Target Date** and a **Note**.
- ▶ Indicate if the activity should have **High Prio** or not.
- ▶ Click **Save** when you are done.

⇒ The activity has now been created and is added to the goals within the care plan.

Diary

Under **Diary**, you can see the messages in the diary of the patient that the patient has shared with you. You cannot respond directly to diary entries, but you can contact the patient via **Chats** if necessary.

Flags



WARNING

Before using this functionality, make sure you have received the required training and understand how to use this functionality and how to interpret the data.

For information about training, please refer to Training.

Important **Flags** are used to indicate if a patient needs attention from a healthcare provider. They can be created, for example, based on rules on incoming measurements or questionnaires. The **Flags** category in the patient's file shows both **Open** and **History** flags. Clicking on a flag will show the relevant information.

In the **Flag review** section you can see if any flags are currently under review by a provider. If the ... indicator is shown, at least one flag that is currently under review. When you hover over the status symbol it will show who is doing the review and when it was started. A checkmark indicates none of that patient's flags are under review.

In the **Open** flags list, individual flags can be acknowledged by clicking the checkbox in front of one or more flags or using the **Select all** option. For more information on how to acknowledge flags, see chapter “Flags” on page 47. If one or more of the selected flags are already under review, you will be asked if you want to cancel the current review and restart it yourself.



By using the *open* button you can go to the **Population > Flags** screen.

Documents

All documents concerning the patient can be managed at **Documents**. Documents can consist of one or more files, for example pdf reports, image files, and emails, that have relevance to the patient. All available documents are listed on the right. On the left, various filter options are available.

A document can be opened by double clicking the item in the list. New documents and files can be added with the + button, see chapter “Add document” on page 42.

In certain cases, it may be required to have a document signed off by either the patient or another person in its care network (another care provider or an informal caregiver). By having a document signed off, there is a formal confirmation recorded in Engage that the recipient has seen the document. For more information on how to send a document to be signed off, see chapter “Sign document” on page 43.

Add document

To add a new document, follow these steps:

- ▶ Click the + button at the top.

☞ The **New document** screen is shown.

- ▶ Enter a **Description**. This will also be the name of the document.
- ▶ Select a **Type** for the document.
- ▶ Optionally, enter a reference to the source or the recipient of the document at **Source/To**.
- ▶ **Direction** is used to indicate if the document has been received or sent by you.
- ▶ Optionally, a **Note** can be used to give more information on the document.
- ▶ **Show to patient** is used to allow/disallow the patient to see the document.

Click **Add** at the bottom to add one or more files to the document.

- ▶ Click **Save** in the top right when you are done.

☞ The document has now been created.

Sign document

NOTICE

Documents that are (being) signed off cannot be edited or deleted. All digital signatures will need to be removed before the document can be altered in any way.

To have a document signed off, follow these steps:

- ▶ Select the document which needs to be signed off.

☞ The document details screen is shown.

- ▶ Select one or more persons who need to sign off the document. The patient can only be selected if the document is shared with the patient (**Show to patient** is enabled).
- ▶ Click **Next**.
- ▶ Enter a message to be sent to the recipient so they know what is expected of them.
- ▶ Click **Assign** to finalize.

☞ The recipient will now be asked to sign the document as a task in their Engage portal.

The recipient will be assigned a task to sign the document. They can simply start the task, read the document, and proceed to sign the document. They will be asked to confirm their digital signature. Once signed, the signature will be shown in the document itself.

Protocols



WARNING

Before using this functionality, make sure you have received the required training and understand how to use this functionality and how to interpret the data.

For information about training, please refer to Training.

ESSENTIAL

The **Protocol** category contains all the protocols, tasks, and rules that are associated with the current patient. From here, you can see the details of these items and make some minor changes to them.

On the left side, you can set filters to limit the lists shown on the right to a certain protocol and/or the status of the tasks. The + button can be used to add a new protocol to the patient file. The following sections describe the three tabs available: **Protocols**, **Tasks**, and **Rules**.

Protocols

The **Protocols** tab lists all the protocols that are currently added to the patient file. It will show the current status of the protocols, including start and end dates, and you can quickly start or stop a protocol.

To add a new protocol to the patient, click the **Add Protocol** option at the bottom and select the required protocol from the list. The protocol will be added as an *Inactive* protocol (this is different than adding a protocol via **Summary**; those start immediately). Click **Start Protocol** in the list to activate it. When starting a protocol, all relevant tasks and rules will be added.

Dependent on the configuration of the protocols used in your organization, some protocols may be automatically assigned to newly created patient accounts in your population.

A protocol can also be paused or stopped. Pausing a protocol can be used when the patient is (temporarily) incapable of completing tasks within the protocol, for example due to hospitalization. A paused protocol can be resumed again when the patient is capable to perform the required tasks again. Stopping a protocol, will immediately end the protocol for the patient. When you stop a protocol, all related tasks that are still open (*planned*) will get changed to *cancelled* and all related rules will be deactivated.

NOTICE

Education content that is assigned to a protocol is visible in the **Education Library** of the patient regardless the active/inactive status of that protocol.

Tasks

The **Tasks** tab lists all the tasks assigned to the patient through the **Protocols** section. It shows the status of the task, when it is scheduled, to what protocol it belongs, and whether it is active or not. Certain tasks can be deactivated by the care provider by clicking the toggle in the **Active** column.

By double clicking on a task, you can see the details. For deactivated tasks, you can edit certain sections of the task details. Click **Save** in the top right to confirm the changes and once you reactivate the task, the changes you have made will be active.



CAUTION

Deactivating a task may interrupt the overall workflow of the protocol as certain tasks will only trigger upon completion of a preceding task.

NOTICE

Tasks created using the red **Assign task** button will not be shown in the **Protocols > Tasks** overview.

Add task

To add a new task for the patient, follow these steps:

- ▶ Click the **Add Task** option at the bottom.

⇨ The **New Task** window is shown.

- ▶ Select the type of task above the **Search** field.
- ▶ Choose a task from the list. You can use the **Search** field to search for it.
- ▶ Click the task to select it.
- ▶ Click **Done** when all required information has been entered.

⇨ The task is now assigned to the patient and listed as an *Ad hoc* protocol task.

Rules

The **Rules** tab shows all protocol related rules that are generated for the patient. It shows the conditions of the rules, which flags will be triggered, which protocol it belongs to, and whether it is active or not. Rules can be deactivated by the care provider by clicking the toggle in the **Status** column.

By double clicking on a rule in the list, you can see its details. You can then make some limited alterations to the rule. An example of this is changing the **Condition** value which will trigger the rule and what flag is created when the rule is triggered. You can also deactivate **Flag actions** and **Task actions**. Click **Save** when you are done editing the rule.



CAUTION

Deactivating or editing a rule can result in Engage not triggering a flag or task when the original protocol settings would have triggered a flag or task. Always use your professional judgment before making any alterations to the settings of a rule.

7 Population

In **Population** you will find population management, divided into the categories described in this chapter.

Dashboard

The **Dashboard** shows in tiles how many unseen home measurements there are and how many patients are linked to you in Engage. This gives you a quick overview of the status of the patients in your population who use Engage. Clicking on one of the tiles opens the corresponding screen.

Unseen measurements

Important

At **Unseen measurements**, all measurements per patient are shown that have not been seen by a healthcare provider. This allows you to quickly see which patients may need attention.

By clicking on the *expand* button in front of the patient name, the list is expanded and the measurements with corresponding date and value are displayed.

With the option **Mark (first 100) unseen measurements** as seen you can indicate that the measurements have been seen.

Telemonitoring

NOTICE

Telemonitoring is only shown if there is at least one patient in your population who has not done a telemonitoring registration for more than 5 days. As soon as another registration is made by this patient, they will be removed from the list.

The **Telemonitoring** dashboard shows all patients in your population who have not registered their telemonitoring items for more than 5 days. By means of the **Review** button you can see the latest registrations and send a message directly to the patient.

Patient lists

At **Patient lists**, various patient lists are shown by either using the filter options on the left-hand side. The result that is shown is based on all parameters you have selected. For example, if you have selected *Male, Has Relation with Professional* and your name, the list will be filled to all male patients with whom you have a relation as healthcare provider. All other patients are left out of the result. The more filters you apply, the less results will be shown.

You can also use one of the predefined patient lists at the left bottom. For **All patients**, all patients for whom you have rights within Engage to view their file. **My patients** shows all patients with whom you currently have a treatment relationship. **Patient demographics changes** shows all changes patients made to their contact details (mobile phone number and e-mail address) in Engage. This list makes it easier for the department responsible for the administrative processing of the patient's contact details in the source system to keep them up-to-date. By clicking the checkmark, it can be marked as having been processed by you in your own source system, this will not happen automatically.

Flags



WARNING

Before using this functionality, make sure you have received the required training and understand how to use this functionality and how to interpret the data.

For information about training, please refer to Training.

Important

Flags are used to indicate if a patient needs attention from a healthcare provider. They can be created, for example, based on rules on incoming measurements or questionnaires. Engage provides an overview of active flags for each patient, which you can filter by **Patient, Protocols, and Flag severity**. When no selection is made, the list shows all patients that have at least one flag active. An active flag is a flag that has not been reviewed and acknowledged by a provider yet.

You can see what patient's flags are currently under review by a provider in the **Status** column. Any patients that have ... in the **Status** column have at least one flag that is currently under review. When you hover over the status symbol it will show who is doing the review and when it was started. A checkmark indicates none of that patient's flags are under review. You can take over review of a flag from another provider by selecting it from the **Flag Details** section on the right side. Check the box of the flag you want to review and a pop-up will be shown to warn you the flag is already under review. Click **Yes** if you want to cancel the current review and restart it yourself.



In the **Flag Details** section, you can also acknowledge that you have reviewed the flag(s), using the steps described below. The acknowledged flags will disappear from the list, but can still be seen in the **History** section of the **Flags** category within the patient's file. By using the *open* button you can go to the **Patient > Flags** screen of the currently selected patient. For more information, see chapter “Flags” on page 41.

To acknowledge flags, follow these steps:

- ▶ Select the patient for whom you want to acknowledge flags.
- ▶ In the **Flag Details**, select all flags which you want to acknowledge by ticking the box in front of them.
- ▶ Click **Acknowledge** at the top.

⇨ The **Acknowledge flags** screen is shown.

- ▶ Enter a note regarding the acknowledged flag for record keeping. The **Categories** field will be automatically filled. For more information on notes, see chapter “Notes” on page 36.
- ▶ Click **Save and acknowledge** to finalize.

⇨ The selected flags have now been acknowledged and notes have been added to the patient's file.

Team chats

Team chats is used to allow a team of people to share a single chat account, also known as a functional account. On this screen, the groups you are assigned to are listed at the top. When you click on any of these groups, you will see all chats in which this group is active and you can respond to these chats in name of the group. New chats will need to be initiated from the patient's file, see chapter “Chats” on page 39.

For more information on the configuration of teams for team chat, see chapter “Manage teams” on page 52.

Insights

NOTICE

Insights is not available by default in Engage and may be not be available for your organization. Contact your application administrator or local Philips representative for more information.

Insights can be used to visualize your patient population data, compare different periods in time, and zoom in on specific information by applying filters.

Understand and improve on operational metrics:

- Helps identify trends in your data and allows proactive steps to manage population metrics.

- Cohort analysis to help understand managed cohort.

Benefits:

- Make informed, data-driven decisions for managing programs and populations.
- Centralized platform to aggregate multiple data streams. Integrated solution with easy to use analytics.

Cohorts dashboard

The **Cohorts** dashboard gives an overview of your population members' status, demographics, and member locations based on the currently selected filter. For more information on filtering your population, see chapter “Filtering” on page 49.

The **Status Overview** section displays the number of members in the managed population by status.

The **Demographics** section displays the member count by age and gender.

The **Member Locations** section displays the location of your members. You can use the zoom options on the map to zoom in and out of specific locations.

Filtering

At the top of Insights is a section called **Filters** through which filters can be set. These filters determine which dataset is displayed on the dashboard. This section shows which filters are currently active. Each individual filter can be removed by clicking the **x** behind it or remove all filters at the same time with the **Clear Filters** option. To add a new filter to the dashboard, follow these steps:

- ▶ Click the **+** button in the **Filters** section.

⇒ The **Filters** sidebar will open. The top section will show the filters that are currently active.

- ▶ In the **Add Filters** section, select the category on which you want to filter (example: *Demographics*). A category may be divided in subcategories (example: *Gender*). In this case, select the subcategory you need.
- ▶ Select one or more filter criteria from the (sub)category by clicking on them (example: *Female*). Active criteria will be highlighted in blue. Some criteria can be set by using a slider. These will show the minimum and maximum value you have selected (example: *Age: 18 to 90*).
- ▶ Repeat these steps until all the criteria you need have been selected. These can be from multiple (sub)categories.
- ▶ Once your selection is final, click the **Apply** button at the bottom. You can use **Undo** to clear filter selections, which have not been applied yet.

⇒ Your filter criteria have now been applied to the dashboard.

Exporting

Each dashboard or block within a dashboard can be exported to a PDF file. Follow these steps to do so:

- ▶ To export the entire dashboard: click the ... button at the top right of the dashboard.
To export a single block of the dashboard: click the ... button at the top right of the block.
- ▶ Click **Export to PDF** to start the export.
- ▶ You will be asked to set a password for the exported file. Enter a **Password** and confirm it.
- ▶ Click **Save & Export** to finish.

⇒ The export will now be generated and downloaded according to your browser settings.

Frequency of data updates

The data used for Insights is updated through a continuous process. The data will be updated as and when it is generated by the application in which it is integrated (Engage for example) with a possible latency of up to 30 minutes.

The dashboards are updated at a scheduled interval. By default, the schedule is once per day.

8 Admin



WARNING

The Admin section will only be available to those user who have the required role. Changes made in these sections will potentially have an effect on the functionality of Engage for the whole organization. Only use these functionalities if you have been properly trained/ instructed on how to use them and proceed with caution.

Register patient



CAUTION

It is advised to create patients automatically via the integration with your internal source system. This functionality can only be made available when no integration with a source system is present.

To manually add a new patient to Engage, follow these steps:

- ▶ Go to the **Admin** section in the top bar.
- ▶ Click the **Register patient** button in the top right.

☞ The **New patient** window is shown.

- ▶ Enter all patient data that is required. These items are marked with *. All other fields are optional.

The **Primary Care Provider** will be the primary provider for the patient. All other providers can be added using the **Other professionals** section.

The patient will automatically be added to the department of the primary provider. If the patients needs to be added to other departments, use the **Other departments** section.



CAUTION

The patient's personal identification number (such as Social Security Number) must be exactly the same as in the source system.

- ▶ Click **Save** in the top right when you are done.

☞ The patient file has now been created in Engage.

NOTICE

To avoid adding duplicate patients a warning message is shown when there is already a patient registered with:

- The same last name in combination with the same date of birth
- The same e-mail address
- The same telephone number

NOTICE

Manually registering a patient using the above procedure will **not** automatically enroll the patient in the Engage patient portal. See chapter “Demographics” on page 33 on how to enroll a patient.

Patient lists

For information of **Patient lists**, see chapter “Patient lists” on page 47.

Manage teams

The **Manage Teams** tab of the **Admin** section is to manage teams that can be used for the team chat functionality. For example, when you make use of a team that jointly cares for a patient, the patient reach any member of the team using this team chat. In some organizations, this is referred to as a functional account. Any member in the team can respond to the chat message.

To add a new team and assign members to it, follow these steps:

- ▶ Click the **+** button next to the **Team lists** header.
- ▶ Fill the required fields and set **Enable chat** to *Yes* if the team needs to use the team chat functionality.
- ▶ Click **Save** in the top right corner.

☞ The team has now been created. Now, you can start adding members.

- ▶ Click the **+** button on the right of the screen.
- ▶ Select all the users you want to add to the team using the **+** behind their name.
- ▶ When you are done adding members, close this pop-up using the **X** button.

☞ The team has been created and members have been added.

From this screen, a team can be edited (**Edit** in the top right corner) and members can be added and removed.

Priority score

The **Priority Score** screen is used to display the formula used to define the priority score of a patient. These scores can be used to sort patients in a logical, prioritized order for providing care. Multiple parameters can be used to influence this score, each with its own assigned weight.

The existing parameters in the formula can be edited by clicking on the **Edit** option in the top right corner. New parameters can also be added by using the **New** option.

9 Mobile app

NOTICE

The Engage mobile app is available for the following operating systems:

- Apple iOS 10 and higher
- Google Android 5.1 and higher

The Engage mobile app for patients (further referred to as "user") allows them to use Engage from their mobile device (smartphone). The app is offered in both the Apple App Store and Google Play Store. It can be installed from either store, depending on their device manufacturer. To guide the user when using the app for the first time, see chapter "First time login" on page 54. If they need help with connecting a measurement device to the app, see chapter "Connecting devices" on page 55.

The Engage mobile app home screen shows measurements on top, followed by **Tasks**, **Chats**, and **Care network & medical record**. More options can be found in the menu at the bottom of the screen.

Using the round + button in the bottom right, the user can add measurements manually. They can choose the measurement category and enter the relevant data. These will be added to the **Measurements** screen in Engage.



CAUTION

The Engage mobile app needs to be connected to the internet for proper data transfers, tasks, and updates. Disconnection from the internet while using the app can cause data synchronization issues. This can create issues with recommendations, tasks, and advices.



CAUTION

Correct data needs to be entered in the Engage mobile app. Adding incorrect information will result in wrong recommendations and wrong tasks will be assigned.

First time login

When the user starts using the Engage mobile app for the first time, you can guide them using the step-by-step instruction below:

- ▷ The Engage mobile app has been installed on the mobile device of the user.
- ▶ Open the **Engage** app.
- ▶ Select the region and tap **Next**.

- ▶ Select the preferred language and tap **Next**.
- ▶ Enter the login credentials provided by the healthcare organization and tap **Login**.
- ▶ On first time use the user will need to change their password. The requirements for the password are shown on the screen. Tap **Next** to continue.
- ▶ A two-factor authentication code will now be sent to the user by SMS. Enter the code and tap **Next**.
After the timer to enter the code reaches zero, a **Resend** option will appear to try again.
- ▶ The user will need to set a security question and answer. This can be used in case the patient forgets their password. Tap **Next** to continue.
- ▶ To allow for quicker access to the mobile app, the user can set a five digit passcode. This code will only work on the current device. After confirming the code, the next step will be shown.
- ▶ The user will need to grant informed consent by tapping all the switches behind the consent items shown. Clicking on the consent item itself will open it so it can be read.
- ▶ Optionally, the user can choose to **Connect** to Apple Health or Google Fit (depending on the device they use) for sharing of certain measurements between the mobile device to the Engage app. They can also choose to **Skip** this step.

☐ The home screen of the mobile app is shown to the user after completion of the steps above.

When the user has selected the wrong region or language, they can always change that at a later time by using the **Change region** option on the login screen.

Connecting devices

To connect the Engage mobile app to measurement devices, follow these steps:

- ▷ The Engage mobile app has been installed on the mobile device of the user and they have an activated Engage account.
To activate the user's Engage account using the mobile app, see chapter "First time login" on page 54.
- ▶ Open the Engage app and log in.
- ▶ Tap **More** in the menu at the bottom of the screen.
- ▶ Tap **App & Devices**.
- ☐ On first time use, the patient will get a pop-up asking Engage to be allowed to use the device's Bluetooth. Accept this.
 - ▶ Tap **+** in the top right corner.
- ☐ The mobile app will start looking for Bluetooth devices in the vicinity.
 - ▶ Select the relevant device from the list of found devices, or from the **Add Manually** list.
 - ▶ Follow the instruction on screen and tap **Start Pairing**.
- ☐ The device is now connecting to the Engage mobile app and can share its measurements.

NOTICE

Always have the user familiarize themselves with the measurement device(s) they will use. Refer them to the relevant user documentation of the device(s) they will use.

A Network safety, security, and privacy

Customer's role in the product security partnership

Philips recognizes that the security of Philips products is an important part of your facility's security strategy. However, these benefits can only be realized if you implement a comprehensive, multi layered strategy (including policies, processes, and technologies) to protect information and systems from external and internal threats. The customer is responsible for setting up and maintaining a secure and stable IT environment according to general IT standards.

Following industry-standard practice, your strategy should address:

- Physical security (e.g., do not allow unauthorized people to use the software product)
- Operational security (e.g., make sure that any sensitive information left on the system—such as exported files—is removed; make sure that users of the software product do not leave the open system unattended)
- Procedural security (e.g., create awareness with regard to the dangers of social engineering; every single user should be given a separate account; do not forget to remove an account when it is no longer needed)
- Risk management
- Security policies (e.g., make sure that the software product documentation and media are securely stored)
- Contingency planning

The practical implementation of technical security elements varies by site and may employ a number of technologies, including firewalls, virus scanning and anti-spyware software, authentication technologies, network segmentation, etc.

As with any computer-based system, protection must be provided such that firewalls and/or other security devices are in place between the medical system and any externally accessible systems.

Although the system incorporates state-of-the-art protection mechanisms to protect it against the intrusion of malware (for example, viruses), a remote possibility remains that a system can become infected. System safety remains guaranteed in all circumstances, but the user might notice unfamiliar system behavior and/or performance. If this happens repeatedly, e.g. also after the system has been switched off and on again, the user is advised to contact a Philips Healthcare service representative to have the system checked and, if needed, to remove the malware.

Additional security and privacy information can be found on the Philips product security web site at <http://www.philips.com/productsecurity>.

The USA Veterans Administration has developed a widely used Medical Device Isolation Architecture for this purpose. Such perimeter and network defenses are essential elements in a comprehensive medical device security strategy.

If you are interested in overviews of validated Security Patches, contact your local Philips representative.

Antivirus software is not provided with the software product. To protect the data stored in the product system, Philips recommends that you run antivirus software on any product server and all workstations, and keep the antivirus software up-to-date on any product server and all workstations.



WARNING

Philips is not responsible for the installation or maintenance of antivirus software or for the integrity of the product system infected with a computer virus.

Contact your Philips service representative for information about qualified versions and configuring these applications so they do not affect Product functionality or performance. For more details on security, please refer to chapter “Network safety, security, and privacy” on page 57.



WARNING

- When disposing of the hard drive, erase all sensitive privacy information.
- Media such as CDs, DVDs, and printouts need to be disposed of in a secure manner when they are no longer needed, since they might contain sensitive privacy information.
- It is the responsibility of the users to keep their password secret.
- It is advised to use Transport Layer Security (TLS) to secure the communications over TCP/IP networks.
- The usage of a wireless LAN is not part of an approved product configuration. However if a wireless LAN is used, it is advised to use a secure and encrypted connection.
- Users should guard their sessions and log off when they leave the product server and/or workstation.
- It is the responsibility of the user to guard removable media at all times.
- Make sure (patient) data is encrypted before transporting it out of the hospital facility.
- Philips recommends installing the validated and published security patches.
- Philips recommends making backup copies of configuration data, the database, and the archive.
- Trained users are recommended to be careful when deleting patient or study data.
- External circumstances can influence the availability of the clinical data, e.g. network failure, power failures, environmental disasters, etc.

Security and privacy requirements

It is the policy of Philips to adhere to all the required standards and regulations. To assist the healthcare organization in fulfilling the General Data Protection Regulation (GDPR), introduced by the European Union, and the Health Insurance Portability and Accountability Act (HIPAA) requirements, introduced by the United States Department of Health and Human Services, the following functionality has been added to the software product system:

Access control

Intended to restrict access to the system to authorized users only:

- Customizable on/off, a user log-on/log-off procedure is required to gain access to the system. Take care that a suitable password procedure is used to log on to your IT equipment, for instance:
 - Use a mixture of upper- and lower-case letters, digits, and special characters.
 - Change the password frequently.
- Access to the system is granted according to a customizable list of authorized users.

Audit trail

Required to log user activities which are critical to information security:

- Applies to logging-on, reading and/or modifying clinical information.
- Requires that means be provided for auto-backup on a hospital server, for example the use of an external standard 'Syslog' server.

Network time synchronization

Intended to synchronize system time to an external time-standard:

- Uses a standard Network Time Protocol (NTP).
- The coupling is configured by Field Service during system installation.

Secure network connection

Computer systems cannot be guaranteed to be safe in an insecure network. The user should provide some level of network protection e.g. installing firewalls.

For internet connections the software product supports the HTTPS protocol with Transport Layer Security (TLS) encryption. Because the standard HTTP protocol does not implement any security control, allowing interception of transmitted data by unauthorized parties, it is no longer supported. Also the outdated Secure Sockets Layer (SSL) cryptographic protocol is no longer supported for HTTPS connections.

HIPAA security and privacy rules

HIPAA defines a number of physical and technical safeguards which are either required or addressable. Some features, that could implement these functions, are differently implemented or not implemented, for reasons mentioned below:

Backup procedure

It is not the intended use of the system to permanently store electronic personal health information. Information should be exported to a storage device as soon as possible.

Emergency access procedure

The system supports a generic emergency account. However, the user should be aware that the knowledge of this generic account and access to the system should be restricted to avoid unwanted access to electronic personal health information.

Automatic log-off

The system supports automatic activation of the log-off function with administrator adjustable expiration time.

Screen blanking

The system supports manual and automatic blanking of displays to prevent casual viewing of electronic personal health information. The system also supports password protection to prevent any unauthorized access (i.e., screen lock).

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