Aetonix Dashboard Guide for Managers

How to use your Aetonix Dashboards to manage patients

Introduction

This guide shows how to accomplish different tasks you may need to do as a Manager of a patient.

To access the Dashboards, use **Google Chrome** and go to http://dashboards.aetonix.com/. Please log in with the same credentials that you registered with in the app.

If you are using a TEST organization, you must log in with the credentials of the TEST organization.

The Dashboards will look similar to this image:
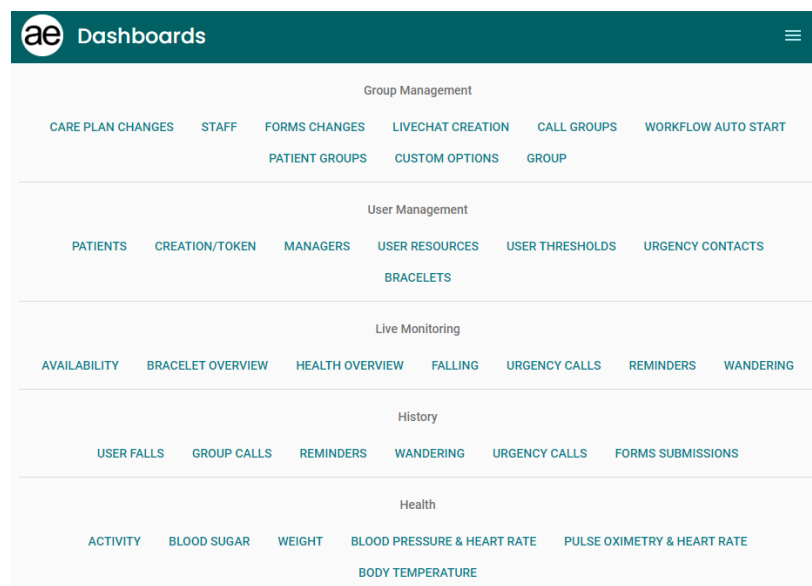
Depending upon implementation of your account, you will use one of two ways to add, remove, and edit users. You will use one of these pages:
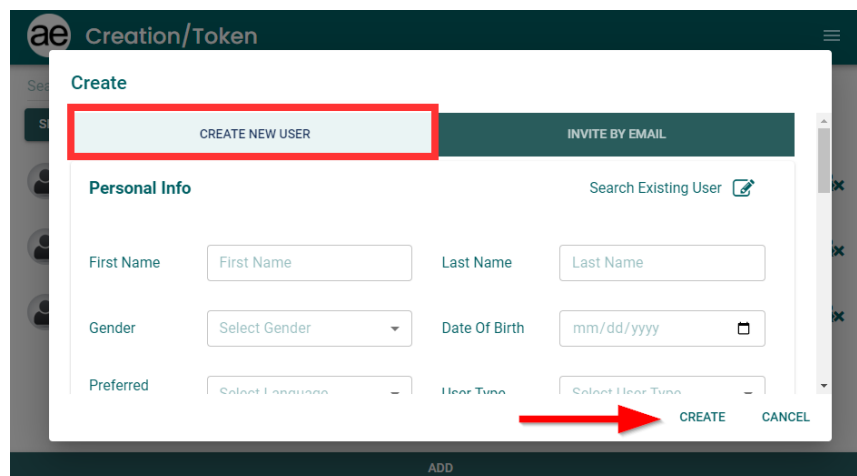
- Creation / Token
- Patients

Creation / Token

Adding a Patient

On the Dashboards under **User Management**, click *Creation / Token*. To add a patient, click *Add* at the bottom of the **Creation / Token** page.
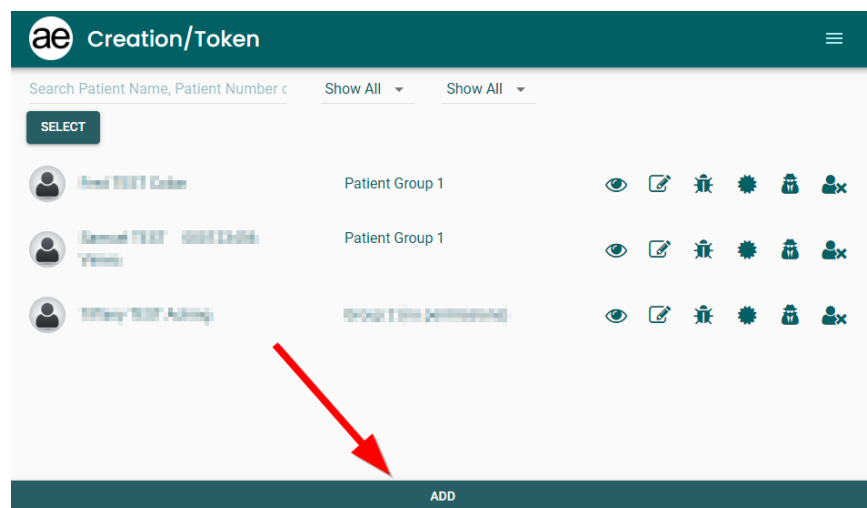
Enter the user's information on the *Create New User* tab. Click *Create* when you are finished.

Assigning a User Type

As you are creating a new user select the user type from the dropdown menu in the **Personal Info** section. Choose aTouchAway / Simplified for a patient using the kit.

Adding User to a Patient Group

If you are creating a new user, you can add the user to one or more Patient Groups in the **Health Info** section of the **Create** window.

Click **Create** to add the patient.

The patient will be added, and the manager will be notified of their new patient.
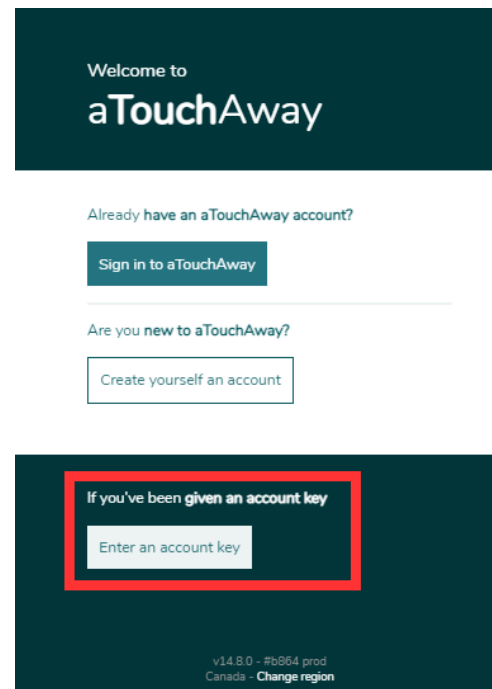
Accessing the User Token (Account Key)

The patient will now be listed on the **Creation / Token** page. To obtain the patient's Token (Account Key), click on the *token* icon as seen below.
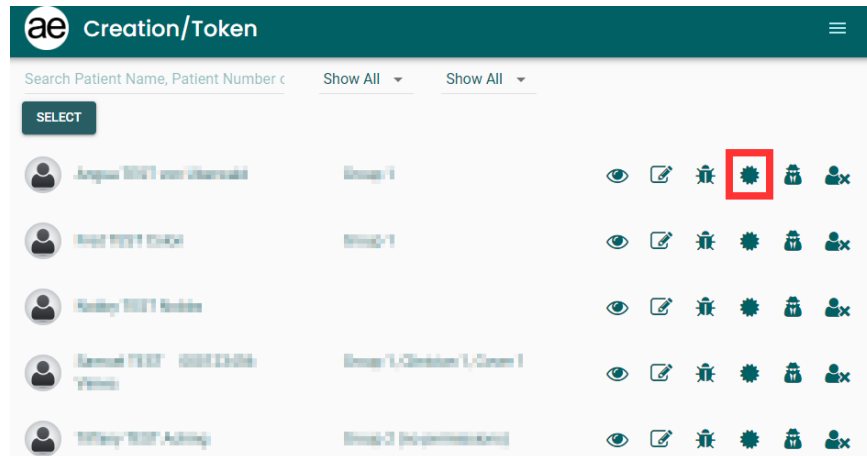
A pop-up window will display an alphanumeric code.

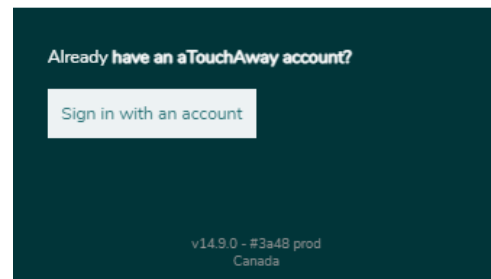On the login page on the kit's tablet, click ***Enter an account key***.

Enter the alphanumeric code from the **Creation / Token** page on the **Dashboards**. Then click *Sign into aTouchAway*. The tablet will be assigned to this patient.

Patients can also be added through the aTouchAway mobile/desktop app.

Making a patient inactive on the Dashboards (Discharging a patient)

This feature is used when a patient has come to the end of their remote monitoring/care program with the clinicians. By making a patient inactive all care pathway interactions between the patient and care team are terminated. Hence, they are discharged from the program.
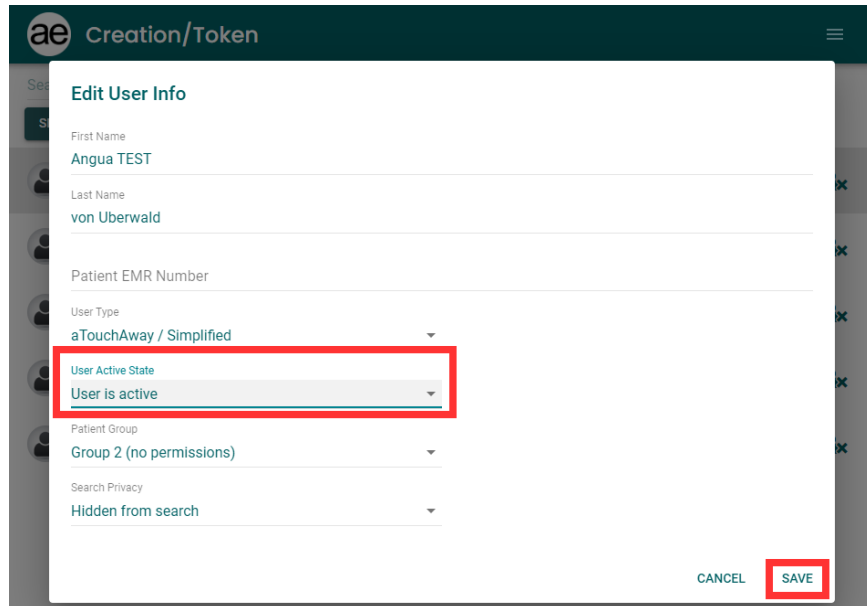
In Dashboards under **User Management**, click *Creation/Token.*
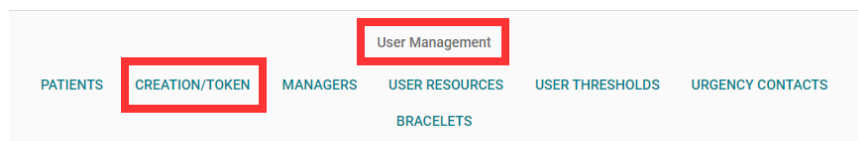
Locate the patient to deactivate and click the **Edit** button.
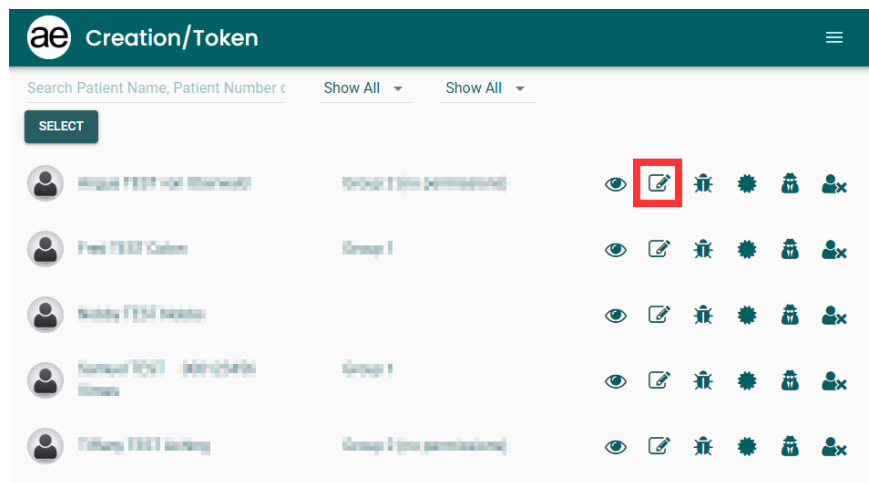
Click the box under **User active state.** Select *User is not active* from the dropdown list. Click *Save*.

In the **Inactive Warning** pop-up window, check the boxes next to *Remove Managers*, *Remove Contacts* (recommended), and *Stop Workflows.* Clicking Remove Managers automatically checks Stop Workflows. Click ***Deactivate***.
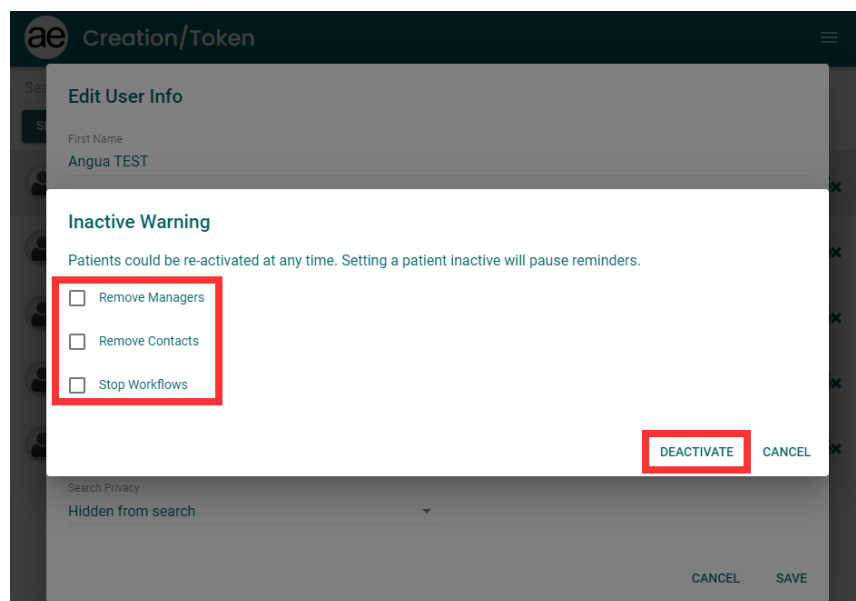

If you would like to maintain the data in the patient's account for historical/reporting purposes, do not remove managers. The account will still be inactive, but the manager(s) will be able to access the patient's data from the aTouchAway app. If you remove the managers, staff members who have the ability to log in to Dashboards will be able to re-activate the user and re-assign themselves as a manager to view the file at any time.
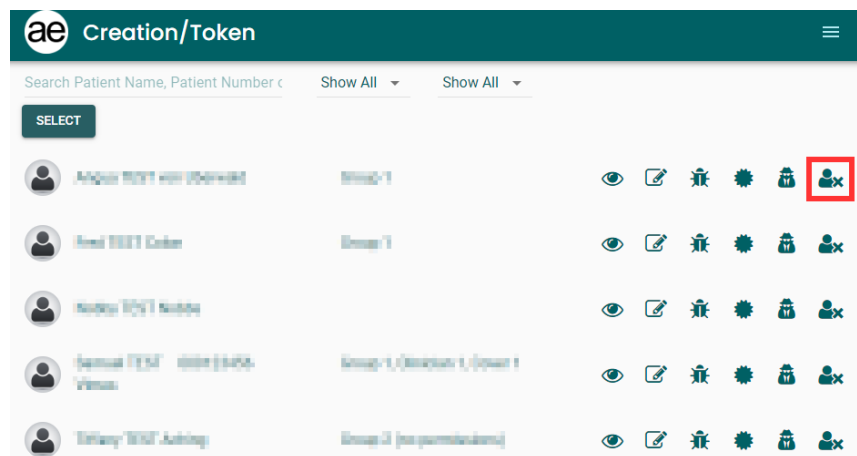
The names of inactive patients will be red on the **Creation / Token** page and will only have the icons applicable to inactive users to the right of their names.
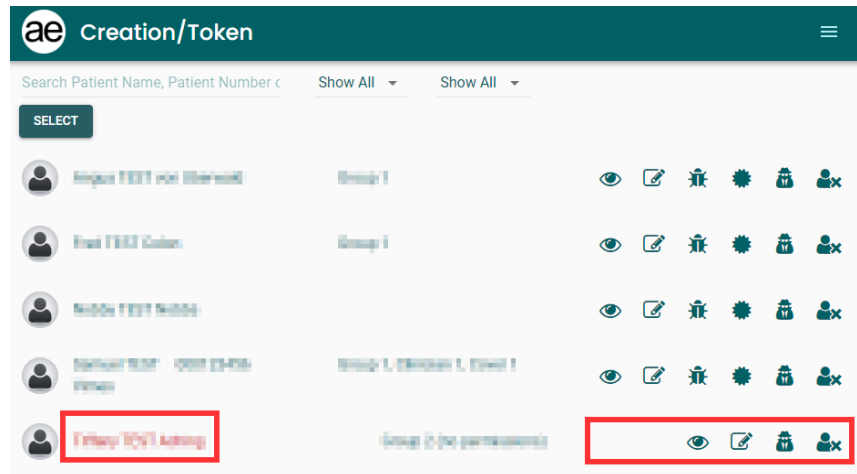
Deleting a patient account

Click on the *Delete* icon to the right of their name.

A confirmation window will open. If you are certain that you want to delete the user permanently, click **OK**. Otherwise, click **Cancel**.
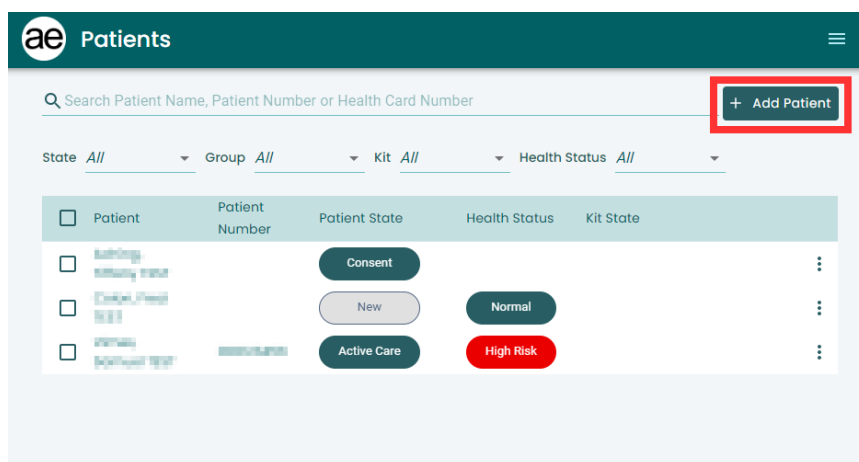

Please note that after clicking OK, the data will be deleted permanently.

Patients

Adding a New User

Add a new user by clicking on the **+ Add Patient** button in the top right corner of the page.

Enter the user's information in the *Create New User* window. Click **Create New User** at the bottom of the form.

Assigning User Type

As you are creating a new user, or by editing a current user, select the user type from the dropdown menu in the **Personal Info** section of the **Create New User** window or

in the **Edit User Info** window accessible through the 3-dot menu to the right of the user's name.
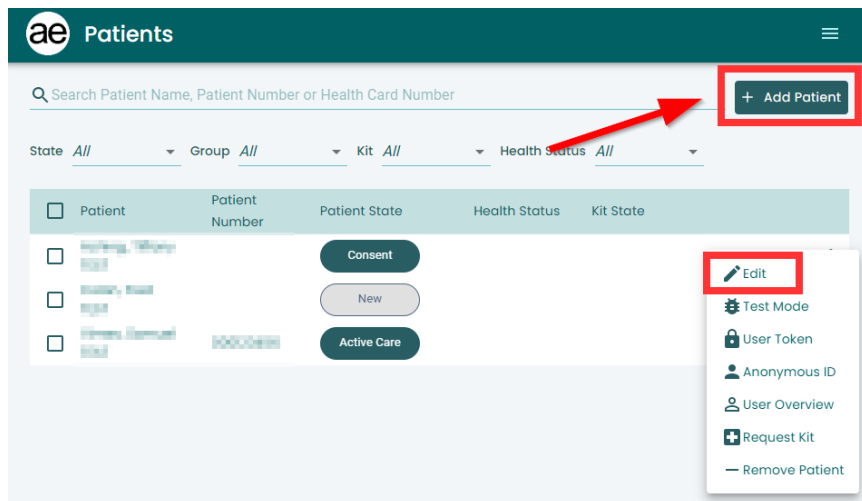
Adding User to a Patient Group

If you are creating a new user, or editing a current user, you can add the user to one or more Patient Groups in the **Health Info** section of the **Create New User** window or the **Edit User Info** window accessible through the 3-dot menu to the right of the user's name.
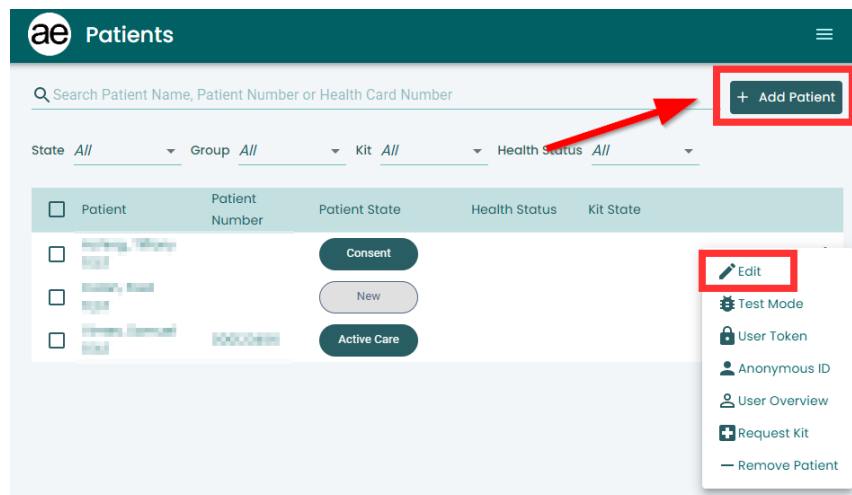
Requesting a Kit for aTouchAway / Simplified Users

For those patients who have been given User Type: aTouchAway / Simplified, a kit that includes a tablet and biometric devices will need to be requested. To request a kit, click on the 3-dot menu to the right of the patient's name. Click on **Request Kit**.
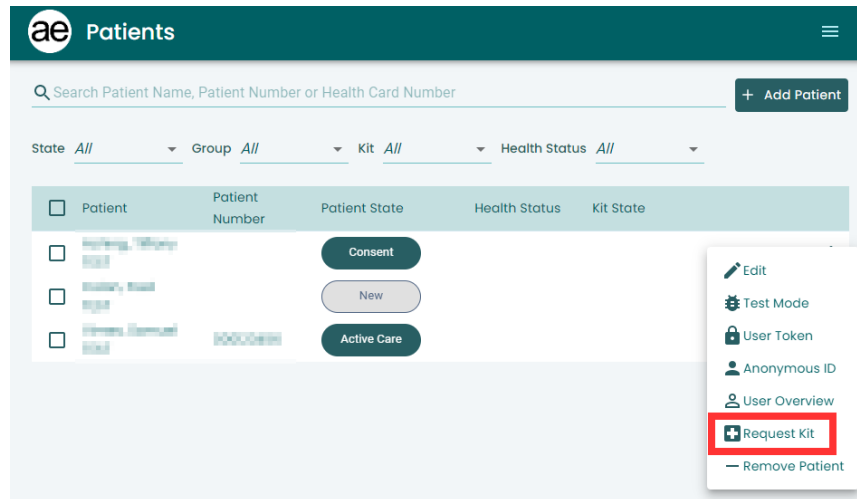
Choose the appropriate kit from the list. Each kit has a description that includes a list of the included devices. The description also includes sizing for the blood pressure cuff, if applicable.

The L, M, S at the end of the kit style number refer to Large, Medium and Small blood pressure cuff sizes.


Complete filling out the form on the **Request Kit** window. Add any additional notes as needed to the bottom of the form. Click **Submit**. You will be able to check the state of the requested kit on the **Patients** page under Kit Status.

Adding members directly to the circle of care

To add a member directly to a patient's circle of care, click *Managers* under **User Management.**
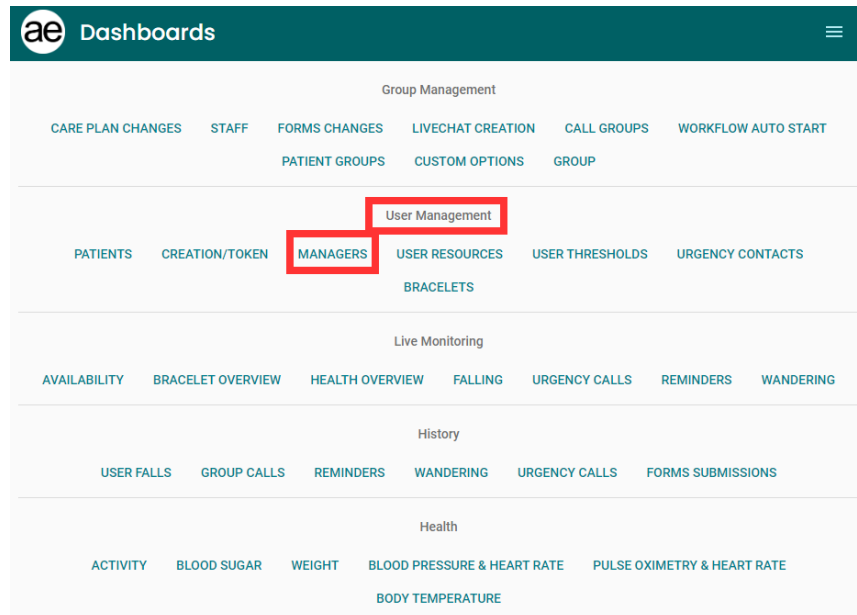

Select the patient you want to modify or add members to their circle of care. You can use the search bar to search by name, patient number or health card number. Click *Add*.
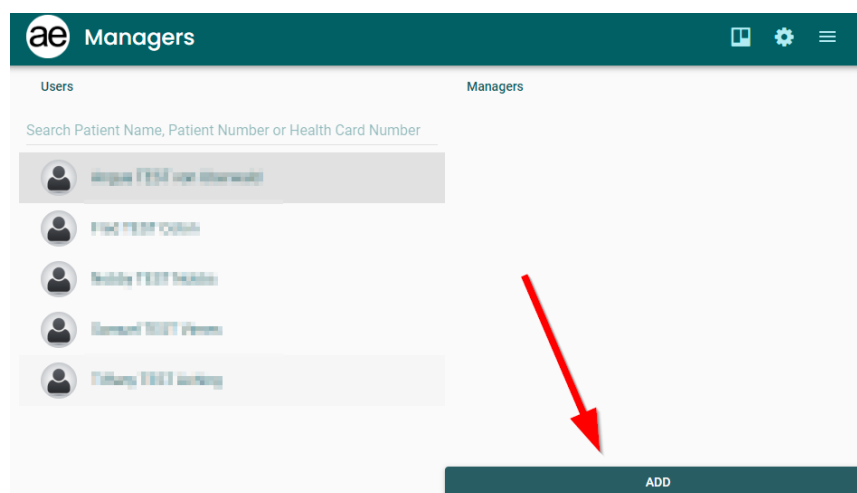
Search for the care team member that you want to add. You can also add preset permissions at this point if you choose. Instructions for creating preset permissions can be found below. Click **Add Chosen Managers**.

Once the care team member has been added, you can select the permissions they will have by clicking on the *notepad* icon to edit.

Set the desired permissions. Click **SET ALL PERMISSIONS** to give all permissions for a full section. To set individual permissions, toggle check boxes On / Off or choose from a dropdown menu for each option. Click **Submit**.
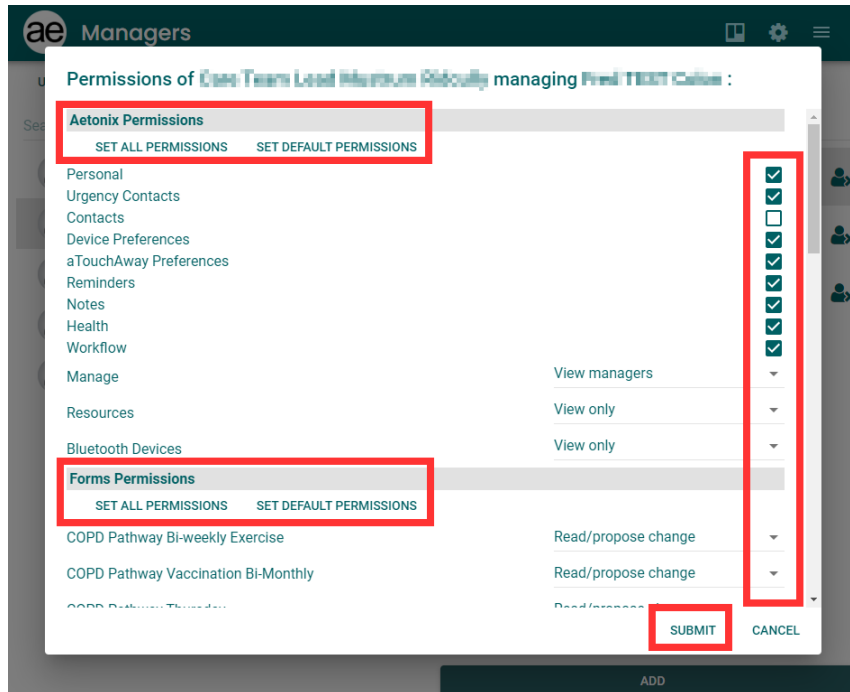
Your member is now added to the circle of care with proper permissions. You can always change the permission at a later time by repeating the above steps.
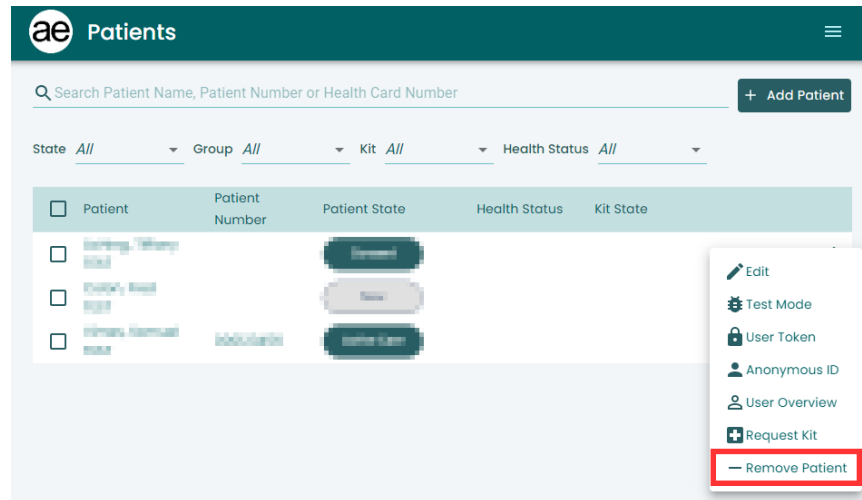
Please note that the above can also be accomplished through the aTouchAway mobile/desktop app.

Deleting a patient account

To delete a patient, click on the 3-dot menu to the right of the patient's name. Click on **Remove Patient**.

A confirmation window will open. If you are certain that you want to delete the user permanently, click **OK**. Otherwise, click **Cancel**.

Please note that after clicking OK, the data will be deleted permanently.

Creating and Using Permission Presets

Permission Presets are a helpful functionality that enables an administrator to add multiple managers to a patient's circle of care without the need to select permissions for each individual.
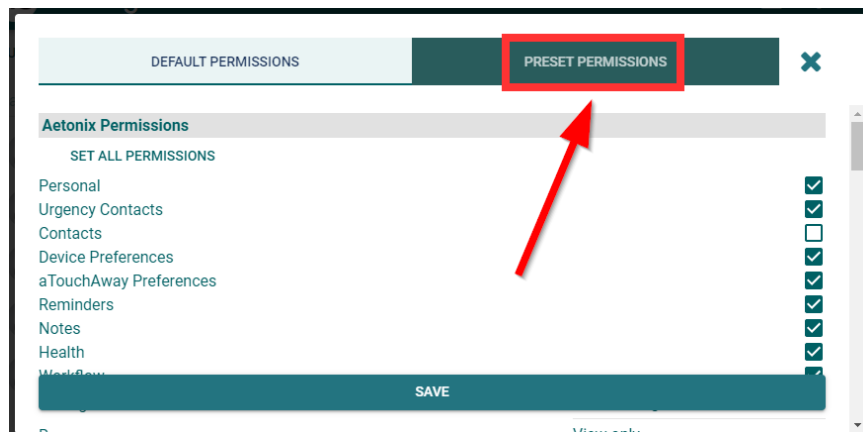
To create a Permission Presets in the Aetonix Dashboards, click *Managers* under **User Management.**
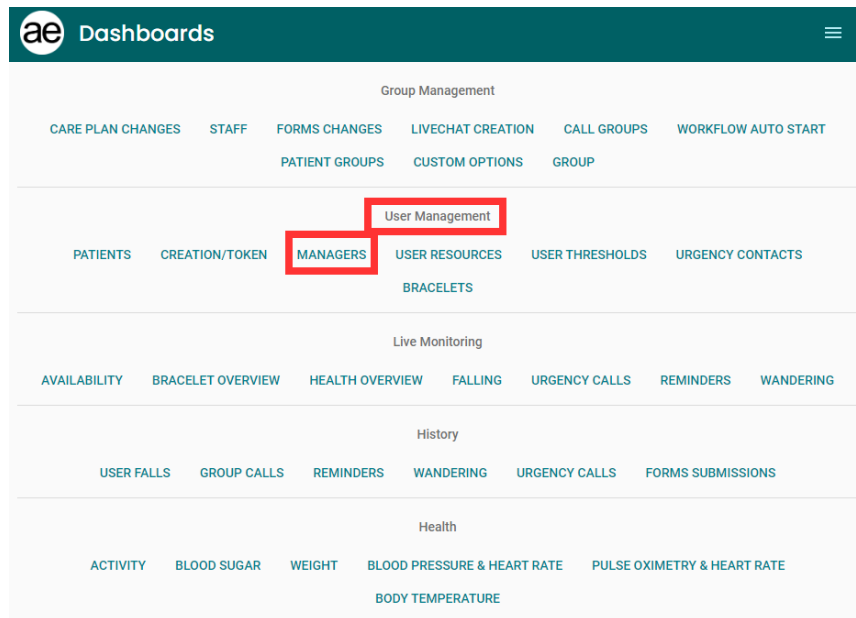

Click the *gear* icon in the top-right corner.
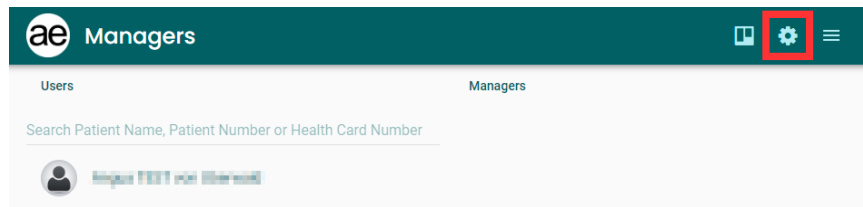
On the Permissions pop-up window, click the **Preset Permissions** tab.

Default Permissions are the settings applied to a "default manager" that is selected when the patient is being created.

Previously created presets will be listed in the window. To edit or delete a previously created preset, click *Edit* or *Delete* to the right of the preset name.

To create a new permission preset, click *+New Preset*.
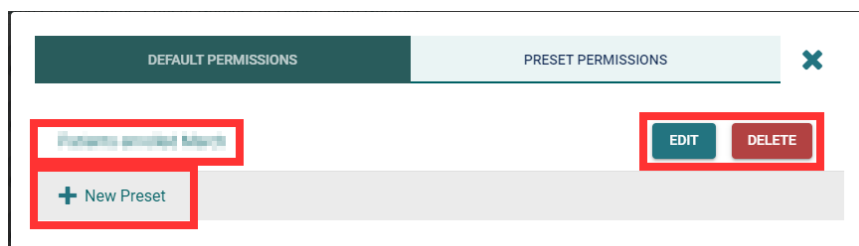
Enter a name for the Preset. It is recommended to use a name that can help the administrator know at first glance what the preset includes. Select the permissions to be saved in the preset. This includes the "Aetonix Permissions" and the "Form Permissions" if available.
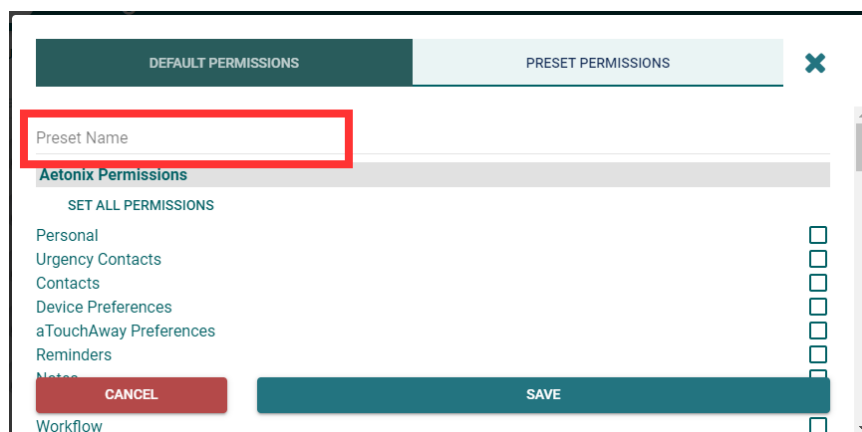
Click *Save*. The Permissions window will show the new preset with options to Edit or Delete.

Presets can be used in the aTouchAway app when adding managers to the Care Team of a patient. Presets can be selected in the step of inviting new managers, and, once the new managers have accepted, the permissions can be edited individually.

Viewing Health Results

To view your patient's live status with workflow or vital signs, go to ***Health Overview*** under **Live Monitoring**. For additional information, go to the [Dashboards Guide by clicking here](#).

You can also download your patient's information in PDF format, please see the **Exporting** section in the [Dashboards Guide by clicking here](#).