



A simple tool for patients to monitor and keep track of their IBD symptoms without the need for face to face interaction

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IBDSmart Admin Portal

The IBDSmart Admin Portal is an administration website for the IBDSmart system. This online system can be used to register patients, manage their profiles, schedule surveys and create cohorts.

Conventions

- Whenever you are entering data, an asterisk after the label of a field means the field is required.

Document history and accuracy

This document was written for version 1.1.0 of the IBDSmart Admin Portal. As systems can change over time, the information in this document may become invalid or inaccurate. Please ensure you have the latest version of this document corresponding to the application version (see "Application version" below). Generally, this version of this document should be somewhat relevant as long as your application version is 1.X.X (X meaning "anything").

Getting started: using a supported browser

Please use Google Chrome to access the IBDSmart Admin Portal. In particular, Internet Explorer 11 is not supported. If you see a blank screen (e.g., when using Internet Explorer 11), please try using a different browser.

Getting started: accessing the portal

Contact the IBDSmart coordinator on ibdsmart@otago.ac.nz to set up an IBDSmart Admin account. Please provide your full name, your email address and your site/DHB. Once your account has been created, you will receive an email asking you to click a link: the link will verify your email and ask you to set your password. Once you have set your password, you can login and use the IBDSmart Admin Portal.

Overview of the admin portal interface

The admin portal has a standard layout:

- A navigation menu on the left-hand side of the page
- A main panel on the right-hand side of the page
- Some options in a menu at the top of the page

The navigation menu can be collapsed by clicking the small white arrow in the top-left corner of the page, next to "IBDSmart Admin". On smaller screens, the navigation menu will automatically be collapsed. When the navigation menu is collapsed, you can expand it by clicking the menu icon ("three horizontal lines") in the top-left corner of the page, next to "IBDSmart Admin".

Log out

In the top-right corner is a button with an "exit" icon and the text "Log out". Click this button to be immediately logged out. After logging out, you will see the login page asking you to log in again. This is normal (all pages on the website require you to be logged in).

Log in

Each time you visit the portal, your account access will be automatically checked: if you need to log in, you will be sent to the login page. If you are already logged in, you will simply see the portal.

Application version

You can see the version of the IBDSmart Admin Portal at the bottom of the page in the footer: e.g., "Version v1.0.0".

Forgot password

If you need to log in and you are on the login page but do not remember your password, click *Don't remember your password?*. You will receive an email "IBDSmart Password Change Request" asking you to click a link: the link will ask you to set your password. Once you have set your new password, you can visit the IBDSmart Admin portal and log in.

Patients list page

Click "Patients" in the navigation menu. You will see a list of all patients. You can search for a patient by entering text in the search filter at the top of the main panel. You can also filter the patients by selecting a cohort in the cohort selector at the top of the main panel.

Searching the patients list

When searching for a patient, you can enter any part of their NHI, first name, last name, email address, or phone number (the "search fields"). You can make your search more specific by entering multiple pieces of information separated by spaces.

- Simple example: smith (search for " smith " in any of the search fields)
- Advanced example: smith john (search for " smith " in any of the search fields AND " john " in any of the search fields)

Sorting the patients list

You can click on most of the columns to sort by ascending (A-Z, oldest-newest), then again to sort descending (Z-A, newest-oldest).

|Note: prefer filtering for a specific cohort instead of sorting by cohort

Adding a patient

On the patients list page in the top-right corner of the results list, click the blue add button (the "+"/"plus" icon). Adding a patient is separated into four sections: General, Contact, HBI/SCCAI Survey Reminder, and Notifications.

- General: general information relating to the patient. Typically, their personal information and diagnosis.
- Contact: contact information relating to the patient. Please note that email must be unique.
- HBI/SCCAI Survey Reminder: HBI/SCCAI survey notification settings for the patient.
- Email Notifications: Email notification settings for the patient (for CDAI/HBI/SCCAI as appropriate).

You must fill in every required field (NHI, First Name, etc.). Required fields are marked with an asterisk ("*") in the label of the field.

The following extra conditions apply:

- Email must be unique. Each email can only exist in the system once.

[Note: when you add a patient, they will receive one or more emails welcoming them into the system. They will typically receive the email within a few minutes: make sure your new patient knows they will receive an email (they may need to check their junk/spam folder). If you enabled email notifications when you created the patient, they may also receive an initial CDAI/HBI/SCCAI reminder email.

System error: when adding a patient fails

Adding a patient needs to send an email (see above). When the system is unable to send the email, adding a patient may fail. If this happens, please try again after a few minutes. If the error persists, contact support.

Survey Reminders and Email Notifications

HBI/SCCAI Survey Reminder

When you enable *Send Survey Reminders* for HBI/SCCAI, the patient will receive survey reminder notifications to their phone on a regular basis. The frequency of the reminders is monthly, and depends on the value of *Months Between Survey Reminders*. You can see the last date on which the patient was sent a reminder under *Last Survey Reminder Sent*. Survey reminders for CDAI are managed elsewhere using by the CDAI Survey Schedule functionality. Also, see Notification schedule and survey visibility below.

Email Notifications

If you want to enable *Send Email Reminders* for HBI/SCCAI then make sure, you enable *Send Survey Reminders*. If you want to enable *Send Email Reminders* for CDAI then make sure, you save the patient, then enable, and configure the CDAI schedule. Patients will receive an email reminder in addition to a notification on their phone.

Click *Save* to submit and create the patient.

Click *Cancel* to discard your changes and return to the patient's list page.

After you successfully create a patient, you will be taken to the patient details page for that patient. See "Viewing a patient" below.

Viewing a patient

Viewing a patient is rather complex: it consists of three areas ("cards"). On the patients list page you can click on any row to go to the patient details page for that patient. The patient details page contains three areas known as cards:

- Patient Details
- Medical Contacts
- CDAI Survey Schedule (Special Authority for Humira)

You must only edit one area at a time: when editing, make sure you successfully *Save* before moving to another area.

Patient Details

This card shows the patient details, separated into four sections: General, Contact, HBI/SCCAI Survey Reminder, and Notifications. System Information simply shows when the patient data was created and when the patient data was last updated.

Click *Edit* to start editing the patient.

Click *Delete* to delete the patient.

Deleting a patient

Patients **cannot** be recovered once they are deleted. Please check you are deleting the correct patient. When you delete a patient, all of their data including their associated surveys will be deleted.

Click *No* to cancel and avoid deleting the patient.

Click *Yes, Delete* to confirm and immediately delete the patient.

Medical contacts

This card shows the medical contacts list for this patient. See "Managing medical contacts" below.

CDAI Survey Schedule (Special Authority for Humira)

This card shows the CDAI survey schedule. See "Managing CDAI survey schedule" below.

Editing a patient

Editing a patient is very similar to creating a patient. On the patient details page for a patient, click *Edit* at the bottom of the Patient Details card. You will see the same form as "Adding a patient", with the same fields and conditions.

Click *Save* to submit and update the patient.

Click *Cancel* to discard your changes and return to the patient's details page for the patient.

[Note: when you change a patient's email address, their old email address will be removed, and they will receive one or more emails to the new email address welcoming them into the system. They will typically receive the email within a few minutes: make sure your new patient knows they will receive an email (they may need to check their junk/spam folder). They will need to set a new password for the new email address. The old email address and password can no longer be used to log in.

System error: when updating a patient fails

If you change the patient's email address, the system sends an email to the new address. When the system is unable to send the email, adding a patient may fail. If this happens, please try again after a few minutes. If the error persists, contact support.

Managing medical contacts

On the patient details page, the second card shows the medical contacts list for this patient. You may need to scroll down to be able to see the medical contacts list.

Adding a medical contact

On the medical contacts card in the top-right corner of the results list, click the blue add button (the "+"/"plus" icon). All fields are required.

Click *Save* to submit and create the medical contact.

Click *Cancel* to discard your changes and return this card to the medical contacts list.

After you successfully create a medical contact, you will stay on the same page and this card will return to showing the medical contacts list.

Viewing medical contacts

You can click on any row to view the medical contact details card for that medical contact.

Click *Edit* to start editing the medical contact.

Click *Delete* to delete the medical contact.

Deleting a medical contact

Medical contacts cannot be recovered once they are deleted. Please check you are deleting the correct medical contact.

Click *No* to cancel and avoid deleting the medical contact.

Click *Yes, Delete* to confirm and immediately delete the medical contact.

[Note: Medical contacts are not currently shared across patients. It is safe to delete a medical contact from one patient even if a medical contact with the "same details" exists on other patients. This may change in the future.

Editing a medical contact

Editing a medical contact is very similar to creating a medical contact. In the medical contacts list you can click on any row to view the medical contact details card for that medical contact.

Then, click *Edit*.

You will see the same form as "Adding a medical contact", with the same fields and conditions.

Click *Save* to submit and update the medical contact.

Click *Cancel* to discard your changes and return to the medical contacts details card for the medical contact.

Click *Back to list* to return to the medical contacts list.

Managing CDAI survey schedule

On the patient details page, the third card shows the CDAI survey schedule for this patient. You may need to scroll down to be able to see the CDAI survey schedule.

Viewing the current CDAI schedule

When CDAI is enabled, the CDAI survey schedule card will show a list of CDAI survey dates. Scheduled dates will be shown by default. You can click *Show expired reminders* to show/hide expired reminders. You can click on the columns in the list to sort by ascending (A-Z), then again to sort descending (Z-A).

Click *Manage Dates* to start editing (managing) the CDAI schedule.

Click *Disable CDAI* to immediately submit and disable CDAI for this patient.

Enabling CDAI

If CDAI is disabled, you will see the following message: "CDAI Surveys are not currently enabled for this patient".

Click *Enable CDAI* to immediately submit and enable CDAI for this patient. You will be shown the CDAI Schedule manager: see "Managing the CDAI schedule" below.

Managing the CDAI schedule

The left half of this card has controls for adding ranges of dates and single dates. The right half of this card shows the CDAI schedule: expired dates, scheduled dates (saved dates), and pending dates (unsaved dates). Dates can only exist once (the same date cannot be both "scheduled" and "pending").

Add multiple dates

Enter the *Regime Start Date* and *Regime End Date*, check or uncheck Include Induction as appropriate, then click *Generate dates and add to schedule*. The newly-added dates will appear in the right half (New Schedule list) with a Status of Pending. The dates will not actually be added until you save all of your changes by clicking *Save new schedule*. If you made a mistake and need to start the whole process again, either delete the dates you just added (see below) or click *Cancel* and start again.

Add single date

Enter the *New Date*, then click *Add single date to schedule*. The newly-added date will appear in the right half (New Schedule list) with a Status of Pending. The date will not actually be added until you save all of your changes by clicking *Save new schedule*. If you made a mistake and need to start the whole process again, either delete the date you just added (see below) or click *Reset* to undo your unsaved changes. You could also click *Cancel* and start again (but *Reset* is faster).

Delete a date

Hover your mouse over the row containing the date you want to delete. A "garbage can" icon will appear at the right-hand end of the row. Click the *garbage can icon* to remove the date from the New Schedule list. The dates will not actually be deleted until you save all of your changes by clicking *Save new schedule*. If you made a mistake and do not want to delete the dates, either re-add the dates you just deleted (see above) or click *Reset* to undo your unsaved changes. You could also click *Cancel* and start again (but *Reset* is faster).

Edit a date

You cannot edit dates. If you want to adjust a pending or scheduled date, delete the date and then add the correct date (see "remove a date" and "add single date" above). Changes to dates will not actually be saved until you save all of your changes by clicking *Save new schedule*. If you made a mistake and want to start again click *Reset* to undo your unsaved changes. You could also click *Cancel* and start again (but *Reset* is faster).

Disabling CDAI

On the CDAI survey schedule card, click *Disable CDAI* to immediately submit and disable CDAI for this patient. Any schedule dates will still exist in the system but reminders will **not be sent**. If you re-enable CDAI in the future, you should always check and update the schedule to remove unneeded dates.

Cohorts list page

Click "Cohorts" in the navigation menu. You will see a list of all cohorts. Additionally, each cohort will show how many patients are currently assigned to that cohort.

Sorting the cohorts list

You can click on any of the columns to sort by ascending (A-Z), then again to sort descending (Z-A).

Adding a cohort

On the cohorts list page in the top-right corner of the results list, click the blue add button (the "+"/"plus" icon). The following fields are required:

- Name

The following extra conditions apply:

- Cohort names must be unique. Each name can only exist in the system once.

Click *Save* to submit and create the cohort.

Click *Cancel* to discard your changes and return to the cohorts list page.

After you successfully create a cohort you will be taken to the cohort details page for that cohort. See "Viewing a cohort" below.

Viewing a cohort

On the cohorts list page you can click on any row to go to the cohort details page for that cohort. The following fields are shown:

- Name

Click *Edit* to start editing the cohort.

Click *Delete* to delete the cohort.

Deleting a cohort

Cohorts cannot be recovered once they are deleted. Please check you are deleting the correct cohort.

Click *No* to cancel and avoid deleting the cohort.

Click *Yes, Delete* to confirm and immediately delete the cohort.

[Note: No patients will be deleted when you delete a cohort. It is safe to delete a cohort even if it has patients.]

Editing a cohort

Editing a cohort is very similar to creating a cohort. On the cohort details page for a cohort, click *Edit*. You will see the same form as "Adding a cohort", with the same fields and conditions.

Click *Save* to submit and update the cohort.

Click *Cancel* to discard your changes and return to the cohorts details page for the cohort.

Notification schedule and survey visibility

Notifications are sent on a regular basis. The exact timing of a notification can vary, depending on several factors. Generally, a notification will be received between 10 am and 2 pm on the day it is scheduled. This also determines when the associated survey becomes visible.

IBDsmart Research

IBDsmart has been tested and clinically proven to be as effective as clinical care in helping patients manage their disease. To read more about the clinical trial refer to the below publication:

McCombie, A., Walmsley, R., Barclay, M., Ho, C., Langlotz, T., Regenbrecht, H., Gray, A., ... Inns, S., & Schultz, M. (2019). [A noninferiority randomized clinical trial of the use of the smartphone-based health applications IBDsmart and IBDoc in the care of inflammatory bowel disease patients.](#) *Inflammatory Bowel Diseases*

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For further information go to the Gut Health Network link <https://www.guthealthnetwork.com/tools-and-links/ibdsmart/>