Annie App for Clinicians

User Manual

VA

U.S. Department of Veterans Affairs

Veterans Health Administration
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User Manual

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Overview

The Department of Veterans Affairs' (VA) Annie mobile application (app) is a Short Message Service (SMS) text messaging capability that promotes self-care for Veterans enrolled in VA health care. Patients using Annie receive automated prompts to track and monitor their own health and motivational/educational messages. Annie also sends VA appointment reminders and messages from the patient's local VA medical center.

NOTE: Annie is for patient self-care and not for direct texting between Veterans and staff.

The Annie App for Clinicians allows clinicians to use and create care protocols that allow patients to easily submit their health readings back to Annie. Messages and patients' data is stored in the Annie system where clinicians can view the texts and readings as needed.

The goal of Annie is to improve care quality, enhance patient engagement, reduce costs of care and provide connected care regardless how far away a patient lives to a VA medical facility. Veterans can sign up to use Annie any time for appointment reminders and broadcast messages from their VA medical facility. Self-care for chronic conditions is promoted with protocol messaging, helping patients monitor their own condition and follow their care plan. To participate in protocol messaging, a patient and clinician must discuss the benefits and risks and mutually agree on how Annie can support a care plan using tailored messaging.

Annie is named after Lieutenant Annie G. Fox, the first woman to receive the Purple Heart for combat. She was Chief Nurse in the Army Nurse Corps at Hickman Field, Pearl Harbor.

Annie is modeled after a successful United Kingdom National Health Service program, known as Flo for Florence Nightingale, where it has been used since 2010.

This user manual provides a step-by-step guide for using the Annie App for Clinicians.

The Basics

The Annie App for Clinicians offers three functions:

- Staff View – Find and register a patient, view and assign a protocol, edit active protocols, review messages to and from a patient, see charts and tables of patient data.
- Admin View – Create and edit protocols assigned to patients in Staff View.
- Broadcast Admin View – Send messages on behalf of your VA medical facility to all Veterans who subscribed to messages from your facility.

The Staff View is available to all users. You may also have Admin View and/or Broadcast Admin privileges.

NOTE: Not everyone will have access to all of Annie's features. While each clinician with appropriate scope of practice privileges will be able to assign and edit protocols for their patients, only some staff members will be able to create protocols and even fewer to send messages on behalf of their VA facilities.

The Annie App for Clinicians is a web app and can be used on Internet capable devices, such as a personal computer or tablet. It is available for Windows, iOS and Android operating systems, and is supported by these Internet browsers:

1. Internet Explorer 9
2. Safari 7
3. Firefox 31

Prerequisites

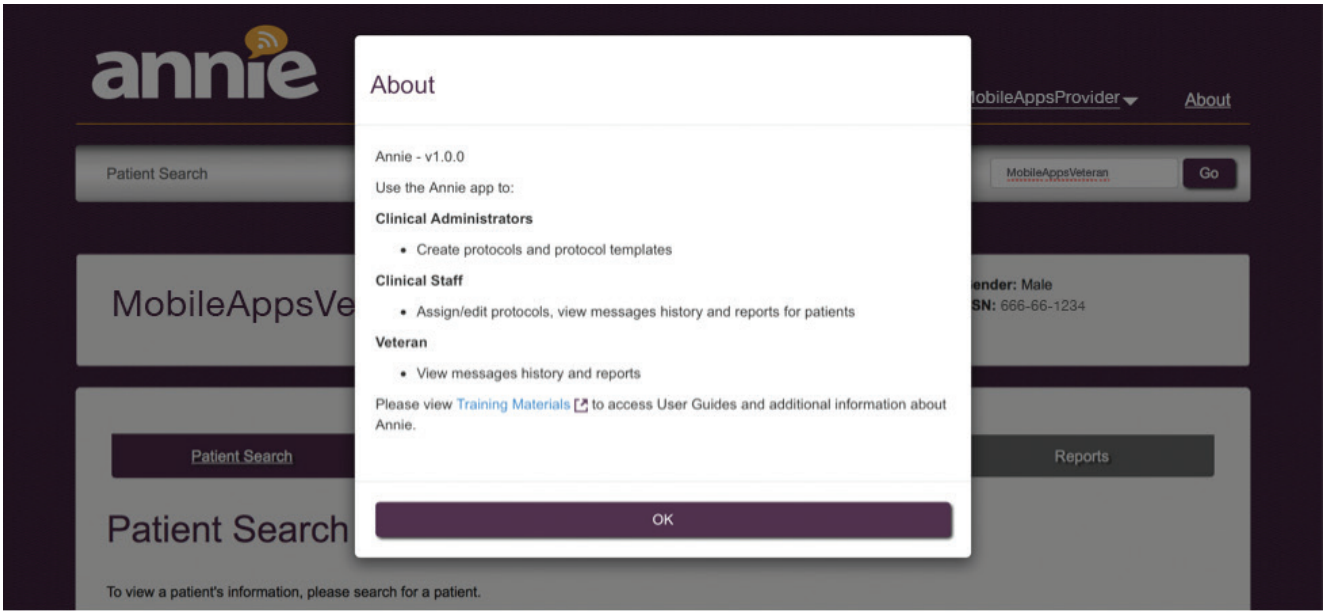
To use the Annie App for Clinicians, you must be a VA health care team member with Veterans Health Information Systems and Technology Architecture (VistA) credentials.

Logging in

Access the Annie App for Clinicians > Tap **Login** > Enter your VistA Username > Enter your VistA Password > Begin typing in a VA Hospital Location > A list of matching facilities will appear in a drop-down list > Tap your VA medical facility > Tap **Sign In**.

Learning about the app

Tap **About** in the upper right corner of the screen > A pop-up About box will appear that describes the function of the app for each type of user. Other resources, such as a Quick Start Guide, Slideshow and FAQs, can be found on ***mobile.va.gov/app/annie-clinicians***, which can be accessed directly by tapping the **Training Materials** hyperlink.



Understanding and switching to Staff, Admin and/or Broadcast Admin views

The Annie App for Clinicians has three possible views: Staff View, Admin View and Broadcast Admin View. The Staff View is available to all users, and depending on user rights, you may also have access to the Admin View and/or Broadcast Admin view. If you are able to access more than one view, you can switch among them by tapping the greeting that says, "Welcome, [Your First Name]" > A drop-down menu will appear > Tap one of the potential opposing views: **Switch To Admin View, Switch To Staff View** or **Broadcast Admin**.

Logging out

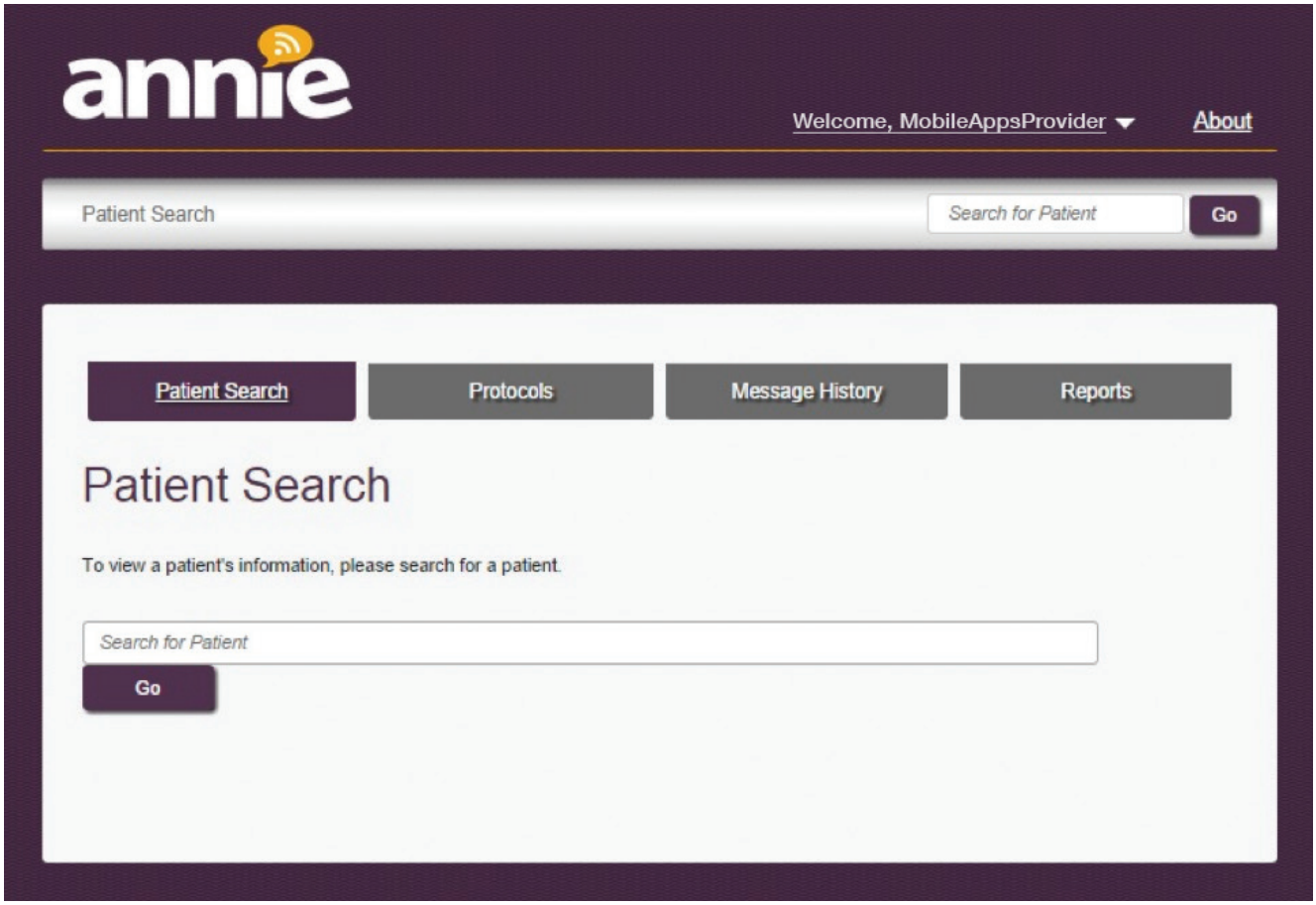
In the upper right corner of your screen, you will see a greeting that says, "Welcome, [Your First Name]." Tap on the salutation, and a drop-down menu will appear > Tap **Log Out**.

Staff View

In Staff View, there are four tabs that allow you to navigate:

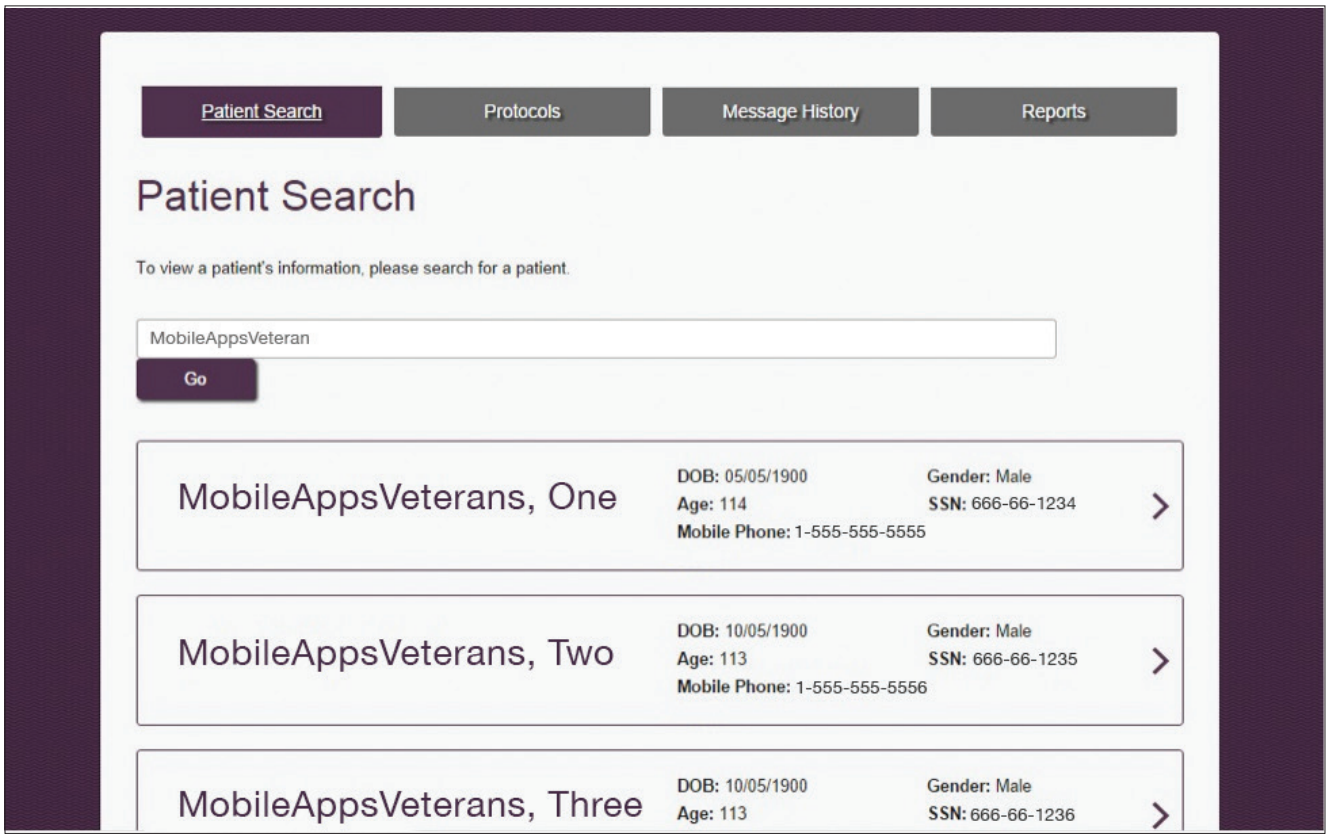
- Patient Search – Search for a patient by last name, full social security number (SSN) or first letter of last name combined with last four digits of SSN.
- Protocols – View and edit active protocols, audit changes made to inactive or active protocols, enable or disable protocols, assign protocols and adjust patient account settings.
- Message History – See the conversation history between your patient and Annie.
- Reports – See charts and tables of patients' health tracking data sent to Annie.

Tap on a tab to go to the corresponding screen.



Patient Search

Easily search for a patient by last name and/or social security number. You must first search for and select a patient before you can view his or her protocols, message history or reports.

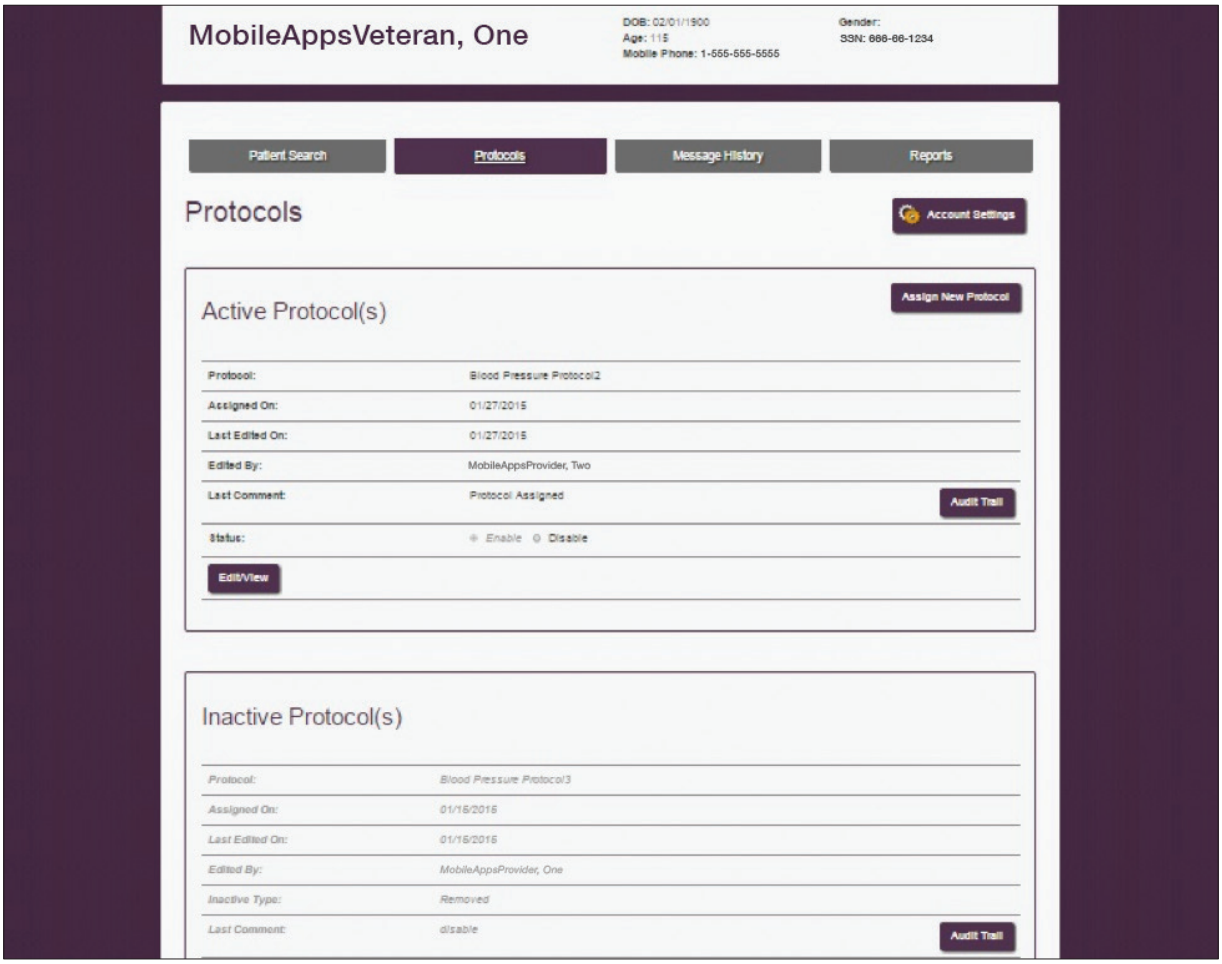


Searching for a patient

The Patient Search will first seek to find patients already registered. If not located, it searches all patients within VA's Computerized Patient Record System (CPRS) at your medical facility. You may have to register a patient to use Annie using Account Settings before you can assign protocols (See 'Adjusting the account settings to register and update your patient's information' section). There are two ways to search for a patient: use the Patient Search bar at the top of the screen, or the Patient Search tab. Enter patient last name, full social security number in the format of XXX-XX-XXXX or first initial of last name and last four digits of social security number in search bar > Tap **Go** > A list of patients who match your search will appear > Tap the patient you would like to view > You will go to the patient's Protocols screen. The patient's name and additional identifying information will always display at the top of the screen in Staff View as you switch among the four tabs.

Protocols in Staff View

In Staff View, you can view and edit active protocols, audit changes made to inactive or active protocols, enable or disable protocols, assign new protocols and adjust your patient's account settings.



Understanding protocols

Protocols use templates that send to and collect information from your patient. Protocols can be accessed by any Annie App for Clinicians user, so you can use protocols other users have created. There are three types of protocol templates:

- Vitals – The Vitals template is to request and receive readings from patients, such as blood pressure. You will have the option for designating the lowest and highest feasible readings for patients in the Reading/Alerts section of the Vitals template. **NOTE:** Patients will receive alerts if their readings are below or above the thresholds you set, so be sure to create thresholds that are clinically relevant and that the alert messages you create tell patients what to do if their readings are too low or too high.
- Motivational/Educational – The Motivational/Educational template is to send messages to patients that do not request a response, but help motivate or educate patients. **NOTE:** Pre-drafted Motivational/Educational messages are not built into Annie; you will need to write messages or edit a protocol that has already created motivational/educational messages.
- Custom – A Custom template allows you to combine two or more of the other templates (i.e., Vitals and Motivational/Educational) to make a more complex protocol.

IMPORTANT: Messages sent to patients should NEVER reference Section 7332 information, which includes information pertaining to drug abuse, alcoholism or alcohol abuse, infection with the human immunodeficiency virus (HIV) or sickle cell anemia. VA's approval to use the system is conditional on the exclusion of this information.

Writing an ideal message

Each protocol has a message area, which you can draft in the Admin View and customize in the Staff View, and will be the exact message the patient receives. **REMEMBER:** Messages are designed to motivate and help patients improve their self-care, so write all messages in ways that are inspiring and friendly. Here are a few examples of ideal messages:

- Service Message = "Hi, it's Annie. Please take your Blood Pressure twice, average your readings, and send me the result in the following format: BP 120 80"
- Reminder Message = "Hi, it's Annie again. I haven't received your BP reading yet. Please send me the average of your two readings in the following format: BP 120 80"
- Message for Valid Reading ="I've got it. Thanks for sending your blood pressure reading. Annie"
- Message for Critical Low Level Alert = "Your BP is very low. The top is 80 or less, or the bottom is 50 or less. Please contact your health care team about your BP. Thanks, Annie"
- Motivational/Educational Message = "With a condition like high blood pressure, you are more important than your doctor. He or she just gives advice, but you must DO IT, which is harder. Annie"
- Motivational/Educational Message = "When measuring your BP, sit quietly and avoid talking for five minutes before you check. Take care, Annie"

If you request a Vitals reading, please include the format the patient should use to send in his or her reading within the Service and Reminder Messages, which are explained below. When a patient responds to a request from Annie to send in a reading (e.g., blood pressure measurement), the response MUST START with a keyword or abbreviation so that Annie understands the message. Annie uses these keywords to know what kind of information the patient is sending. The letters can be upper or lower case. Spelling has to be EXACT. Depending on the information the patient is sending, the message must begin with one of the following keywords or abbreviations (see terms in bold):

When Annie requests this information	The patient must start the message response with
Blood Pressure	**BP** or **BLOOD**
Pulse Oximetry (SpO2) or Oxygen level	**OX** or **OXYGEN**
Blood Glucose or Sugar	**BG** or **GLUCOSE** or **SUGAR**
Glucose Before Eating	**BGB** or **BEFORE**
Glucose After Eating	**BGA** or **AFTER**
Weight Loss	**WE** or **WEIGHT**
Caloric Intake	**CAL** or **CALORIES**
Amount of Exercise	**EXERCISE**
Temperature	**TEMP**
Pulse	**PULSE**

For example, if the request is to send in a temperature reading, then write the Service and Reminder messages to include the appropriate keyword or abbreviation. "Please send me your temperature in the following format: TEMP 98." Again, if the patient responds without using the correct format, Annie will not understand the message.

Viewing active and inactive protocols

First search for and select a patient whose protocol(s) you would like to edit or view. Then tap the Protocols tab > You will see a list of a patient's Active Protocol(s) and Inactive Protocol(s), which shows you:

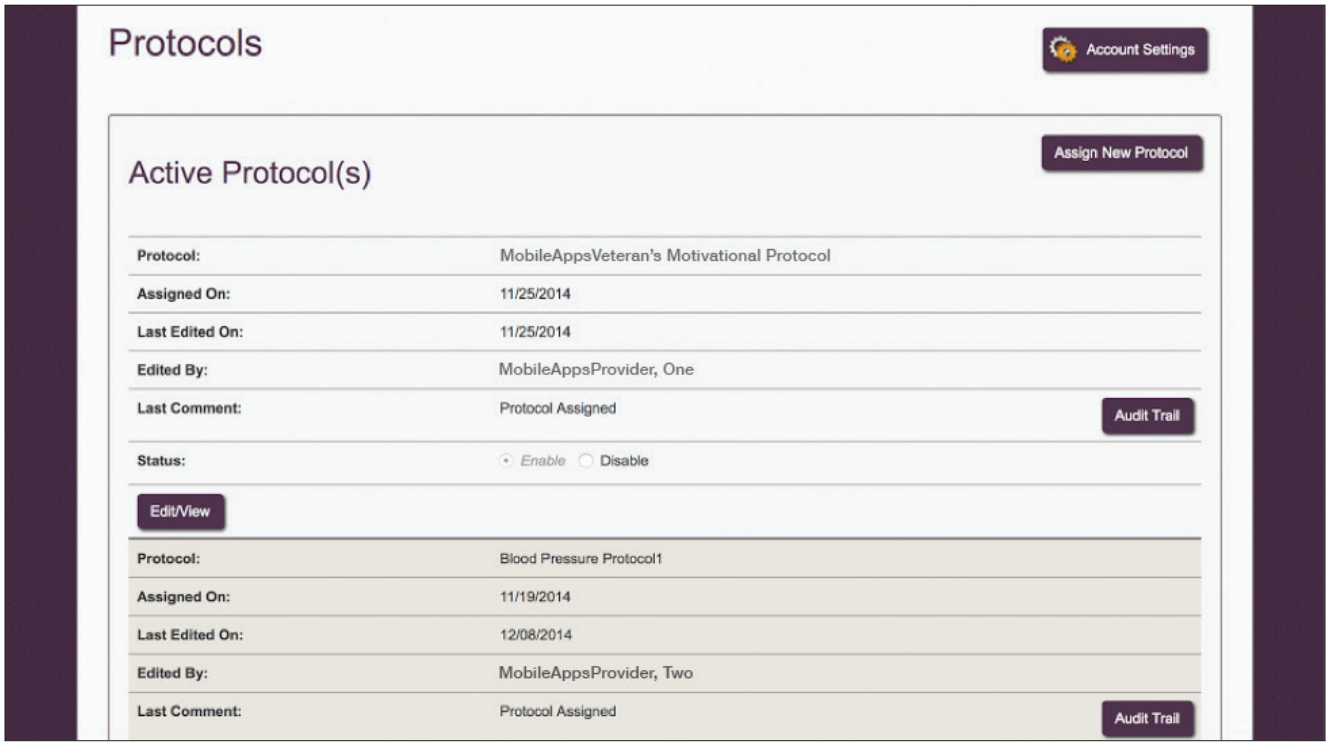
- Protocol – Name of the protocol.
- Assigned On – Date the protocol was assigned to the patient.
- Last Edited On – Date the protocol was last updated or changed.
- Edited By – Name of the VA clinician who last updated or changed the protocol for this patient.
- Last Comment – Most recent note pertaining to the status of the protocol, which may be a comment from the clinician, a comment from the Veteran or an automatic message from Annie if a template end day has passed (**NOTE:** All changes to a protocol can be viewed by tapping **Audit Trail**).
- Status – Buttons to enable or disable the protocol.

Assigning a new protocol

You can assign protocols to patients who are registered with Annie and who have not paused or stopped protocol messaging. (If a patient has paused and resumed Annie, active protocols will automatically resume; if the patient has stopped and wants to restart Annie, in addition to the patient sending the Start message to Annie, the patient will have to notify you that he or she wants to use Annie again, and you will have to reassign or create new protocols for the patient.) First search for and select the patient to whom you would like to assign a protocol > Tap **Assign New Protocol** > You will go to a list of protocols that have already been created (**NOTE:** You cannot create a new protocol in Staff View; protocols can only be created in Admin View) > You can search for specific protocols by typing the name or focus area (i.e., blood pressure, glucose before eating) into the Search Focus Area under the Protocols subhead (**NOTE:** This function is not currently in operation, but will be implemented in a future version of the app) > Tap **Assign** for the protocol you would like to set up for your patient > A pop-up window will appear that asks if you would like to customize the protocol > Tap either:

- **Yes** – Adjust the protocol using the templates (See "Editing or viewing a protocol" section for detailed instructions) > Tap **Save** (or tap **Cancel**, and then tap **Yes** in the pop-up box to confirm you would like to cancel) > A pop-up Save window will appear confirming changes are saved > Tap **Okay** to close. The customized protocol will be assigned to the patient > When the protocol has been assigned you will be taken back to the Protocol screen where a brief message will say the protocol has successfully been assigned.
- **No** – No changes will be made to the existing protocol, and the protocol will be assigned as-is for the patient > When the protocol has been assigned you will be taken back to the Protocol screen where a brief message will say the protocol has successfully been assigned.
- **Cancel** – You will stay on the same screen with no changes made to the protocol or protocols assigned to the patient. **NOTE:** Validation warnings will convey whether or not you need to modify the information provided after you have customized the protocol and before you are able to save your changes.

NOTE: Before you assign a protocol, make sure the health readings information (e.g., blood pressure) requested is not already requested by another protocol. If more than one protocol asks for the same patient data, the duplicated data will not be properly tracked, and patients may be sent conflicting messages. For this reason, the system will not allow a clinician to assign a protocol that collects a duplicate reading.

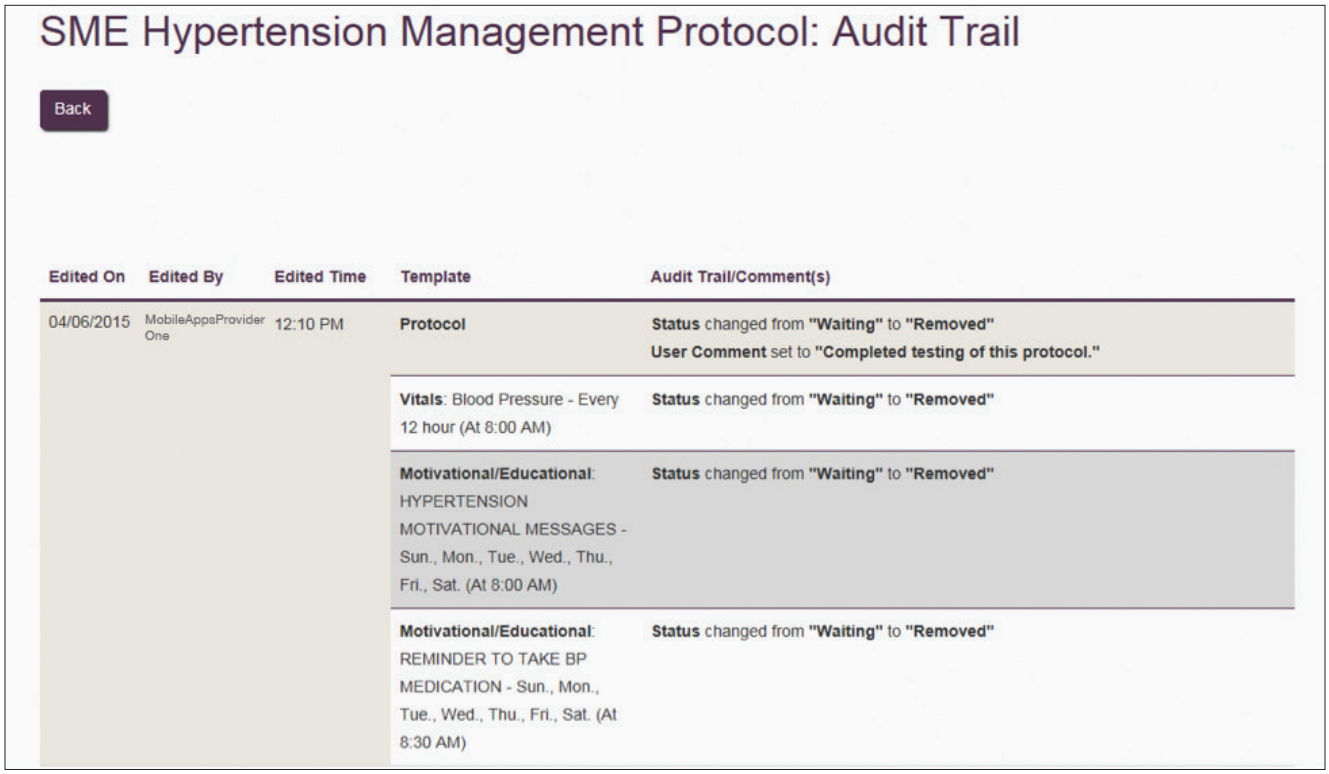


Reviewing protocol edit history

Tap **Audit Trail** on the protocol whose change history you would like to view > You will go to the protocol's Audit Trail screen > You will see an overview of the protocol, including:

- Edited On – Date and time the protocol was changed or updated.
- Edited By – Name of the VA clinician who last updated or changed the protocol.
- Edited Time – Time when the protocol was last changed or updated.
- Template – Indicates the template in which the changes were made.
- Audit Trail/Comment(s) – Notes pertaining to the change in status of a protocol, which may be a comment from the clinician, an action from the Veteran or an automatic message from Annie if a template end date has passed, as well as all of the changes to the protocol organized by template.

To return to the Protocols screen, tap the **Protocols** heading.



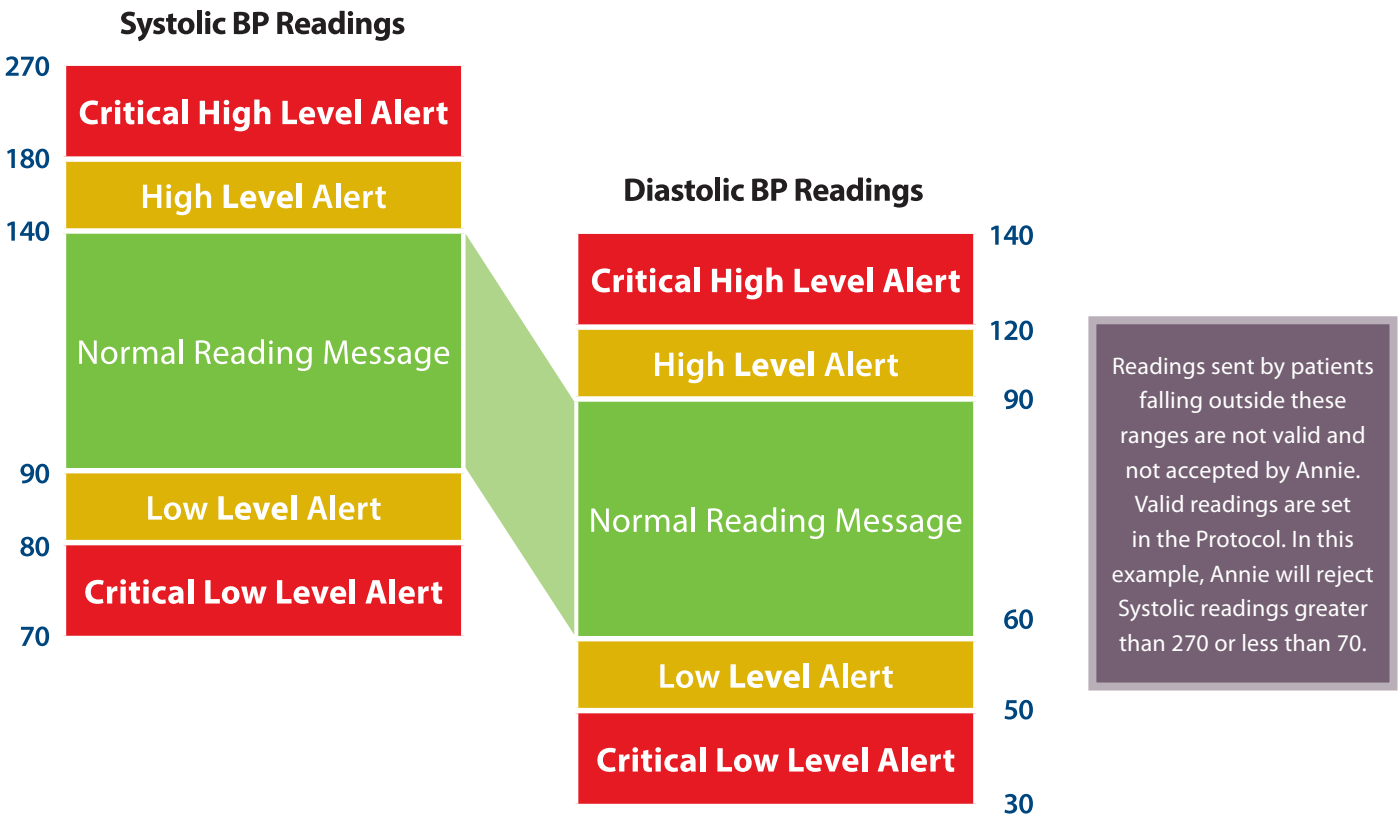
Editing or viewing a protocol

If a protocol is active, you will be able to edit or view its details. Tap **Edit/View** under the active protocol you would like to edit or view > You will go to the protocol's screen that shows its name, description and templates > Tap the template associated with the protocol that you would like to edit > A drop-down list of the protocol's settings will appear, which will depend on whether you are editing a Vitals, Motivational/Educational or Custom protocol > Tap the settings heading you would like to edit, which will expand the template details below:

- **Schedule Settings** – Specify how often your messages should be sent by tapping the bar under Schedule > A drop-down menu will appear, and tap either:
  - **Once** – Your message will only be sent once based on the Service Message Start Time and the Template Start Date.
  - **Specified Days** – A "Select Days that Apply" section will appear > Tap the checkbox(es) next to the day(s) of the week on which you would like to send your message.
  - **Custom** – A "Time Between Each Cycle" section will appear > Type in a number in the left bar > Tap the right bar, and tap either **Minute, Hour, Day, Week, Month** or **Year** from the drop-down menu that appears. For example, if 12 hour(s) is selected, then a message will be sent every twelve hours based on the Service Message Start time.

  (**IMPORTANT:** If you are editing a Vitals template, you have the option to tap the circle next to Yes or No to indicate if you would also like to receive any unscheduled readings your patient may send. Please always ensure that Yes is selected so that Annie will respond appropriately to all messages sent by patients.) > Tap the bar under Template Start Date > Tap a date on the pop-up calendar that appears > Tap the bar under Template End Date > Tap a date on the pop-up calendar that appears. **NOTE:** The Template Start Date is the first day messages associated with this template will be sent to the patient. The Template End Date is the last day messages associated with the template will be sent to the patient, as well as the final day the patient can send in readings to Annie.

- **Reading/Alerts Settings (for Vitals only)** – Tap the bar under Measurement, and tap the type of reading the protocol addresses from the drop-down menu that appears > The words or abbreviations related to the type of measurement you selected will appear in the Keywords box. These are the available words or abbreviations patients must use when they send in their readings > In the Reading Parameter section, type in the lowest and highest valid or feasible reading levels (Annie will reject any reading outside of this range) and the message for a normal reading > If desired, in the Set Critical Low & High Level Alert and Set Low & High Level Alert sections, type in the threshold levels and messages associated with each. The Critical Low/Low Alert values and High/Critical High Alert values will have to fall within the valid reading range, as noted in the diagrams below. Additionally, the values for Low Alert and High Alert must be within the Critical Alert values, also as noted in the diagrams below. Any valid readings that do not fall within an Alert range are regarded as normal. The values you use will determine whether the readings from the patient trigger an alert back to the patient. Annie will send the message that corresponds with the range where the number falls.

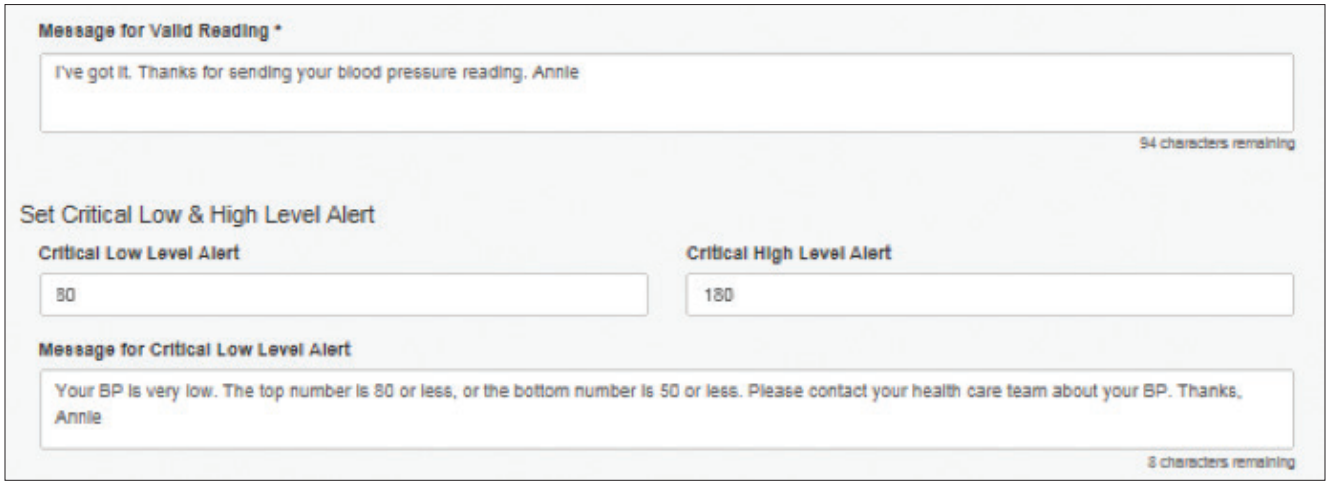


- Critical Low Level Alert – Reading to trigger a Critical Low Level Alert Message to the patient. Valid readings at or below this range are considered very low.
- Low Level Alert – Reading to trigger a Low Level Alert Message to the patient. Valid readings at or below this range are considered to be low.
- High Level Alert – Reading to trigger a High Level Alert Message to the patient. Valid readings at or above this range are considered to be high.
- Critical High Level Alert – Reading to trigger a Critical High Level Alert Message to the patient. Valid readings at or above this range are considered to be very high.

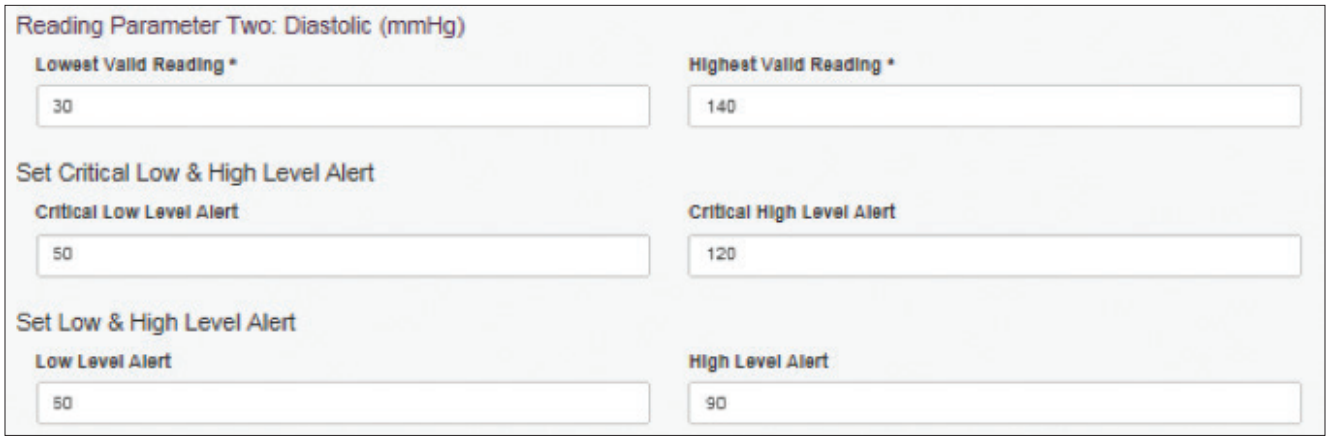
NOTE: Because readings do NOT trigger alerts to a VA clinician or health care team, make sure all threshold levels are clinically relevant to the patient and that the messages and alerts you create tell your patient what to do if a reading is too low or too high.

IMPORTANT: Please ensure that the threshold levels and messages are appropriate to your patient population and your facility's clinical procedures for providing care.

NOTE: If you edit a vitals template that collects blood pressure readings, then there are two reading parameters that will be sent by the patient to Annie, Systolic and Diastolic. As shown in the below screenshot, you can establish Alert threshold values and messages for the first parameter – systolic.



While you can establish separate Alert threshold values for the second parameter, diastolic, you can't create separate messages, which is as shown in the next screenshot, for this parameter.



As such, if you refer to the Alert values in an Alert message, then please consider specifying both values in your message as in the following example: "Your BP is very low. The top is 80 or less, or the bottom is 50 or less. Please contact your health care team about your BP. Thanks, Annie."

- **Message Settings (for Vitals)** – Type in a Service Message, which is the message that asks the patient to send in a reading (see "Writing an ideal message from Annie" for tips and best practices) > Type in the Reminder message, which is the message sent if the patient has not sent in a reading after being prompted (creating a reminder message is not required, but is strongly recommended to help ensure your patient submits readings and receives the appropriate responses from Annie) > Type a number into the bar beneath Amount of Time Between Reminders > Tap the bar under Select Time Schedule, and tap **Minute, Hour, Day, Week, Month** or **Year** from the drop-down menu that appears > Type a number into the bar beneath Number of Times Reminder Message is Sent.
- **Message Settings (for Motivational/Educational)** – Type in a message (up to 160 characters) > If desired, tap **Add Message** to create more than one message, and Annie will send the messages in the order that appears in the list. The list is repeated after the last message is sent. To remove the last message in the list, tap **Remove Message**.

Tap **Save** > Validation warnings will convey whether or not you need to modify the information provided before you are able to save your changes. If not, a pop-up box will appear confirming that your changes have been saved > Tap **Okay**. You will return to the Protocols screen.

Adjusting the account settings to register and update your patient's information

Tap **Account Settings** You will go to an Account screen > Tap on one of the four tabs, which will expand settings management options beneath each tab:

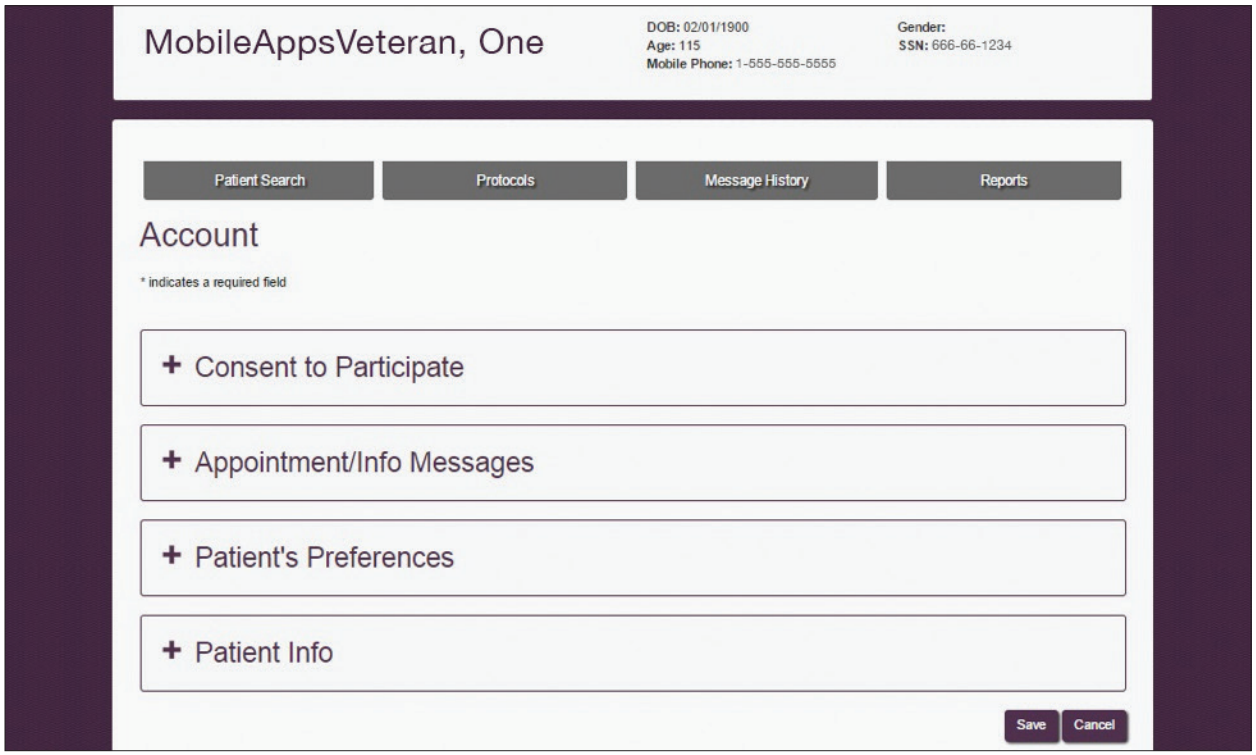
- **Consent to Participate** – Either to register a new patient with Annie, obtain the informed consent of a patient to participate in protocol messaging or to review conditions with him or her, tap **Annie Information and Disclosure Factsheet** > A pop-up box with background information about Annie, patient responsibilities and risks will appear > Read over the information, and provide an overview to your patient to make sure he/she understands and consents to the Annie messaging service > Tap **Dismiss** to close the box > Tap the checkbox next to "Patient-Provider Informed Consent Discussion Occurred" to confirm the patient understands and agrees to participate in Annie.

  NOTE: You may notice that some of the information in these sections is already filled out if the patient has self-registered to use Annie. However, you will still need to discuss Consent with your patients in order for them to use the Protocols features of Annie, otherwise they are limited to only receiving appointment reminders and medical facility broadcast messages.

  IMPORTANT: While the checkbox is only selected once, the patient's informed consent to use Annie should be obtained each time a new protocol is assigned to the patient and the consent/assignment noted in CPRS.

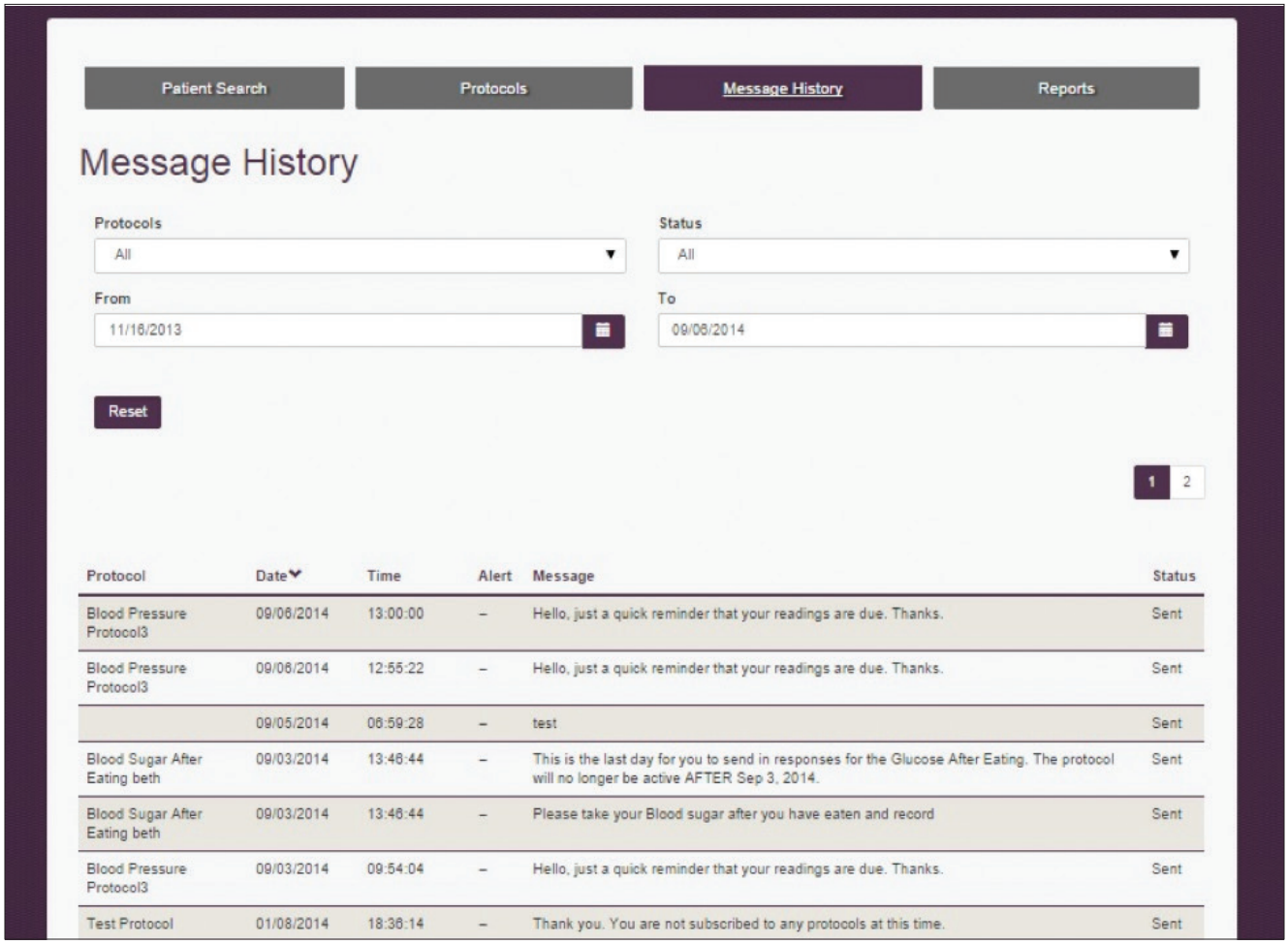
- **Appointment/Info Messages** – Tap the checkbox(es) next to Appointment Reminders and/or VAMC Facility Messages depending on the types of messages your patient would like to receive. If you checked Appointment Reminders, then a reminder will be sent to the patient one day and three days in advance of the appointment. If you checked VAMC Facility Messages, tap the bar under Select a Facility, and tap one of the medical facility names from the drop-down menu that appears.
- **Patient's Preferences** – Tap the circle next to the type of device your patient uses. If your patient would like to use the smartphone app, you can also tap the checkbox to sign your patient up for receiving a generic SMS text notice from Annie indicating to your patient that he or she has received a new message within the app.
- **Patient Info** – Your patient's name and other identifying information will appear, which is pulled from Department of Defense data or his or her record in CPRS and will not be editable. Type in your patient's mobile phone number > Tap the bar under Time Zone, and tap the preferred time zone from the drop-down menu that appears > If desired, type in your patient's home phone number and email address.

Tap **Save**. Validation warnings will convey whether or not you need to modify the information provided before you are able to save your changes. To exit without saving changes, tap **Cancel**.



Message History

Read the conversations between Annie and your patient.



Viewing a patient's message history

Search for and select a patient whose message history you would like to view > Tap the **Message History** tab > You will see the details of the messages exchanged between Annie and your patient:

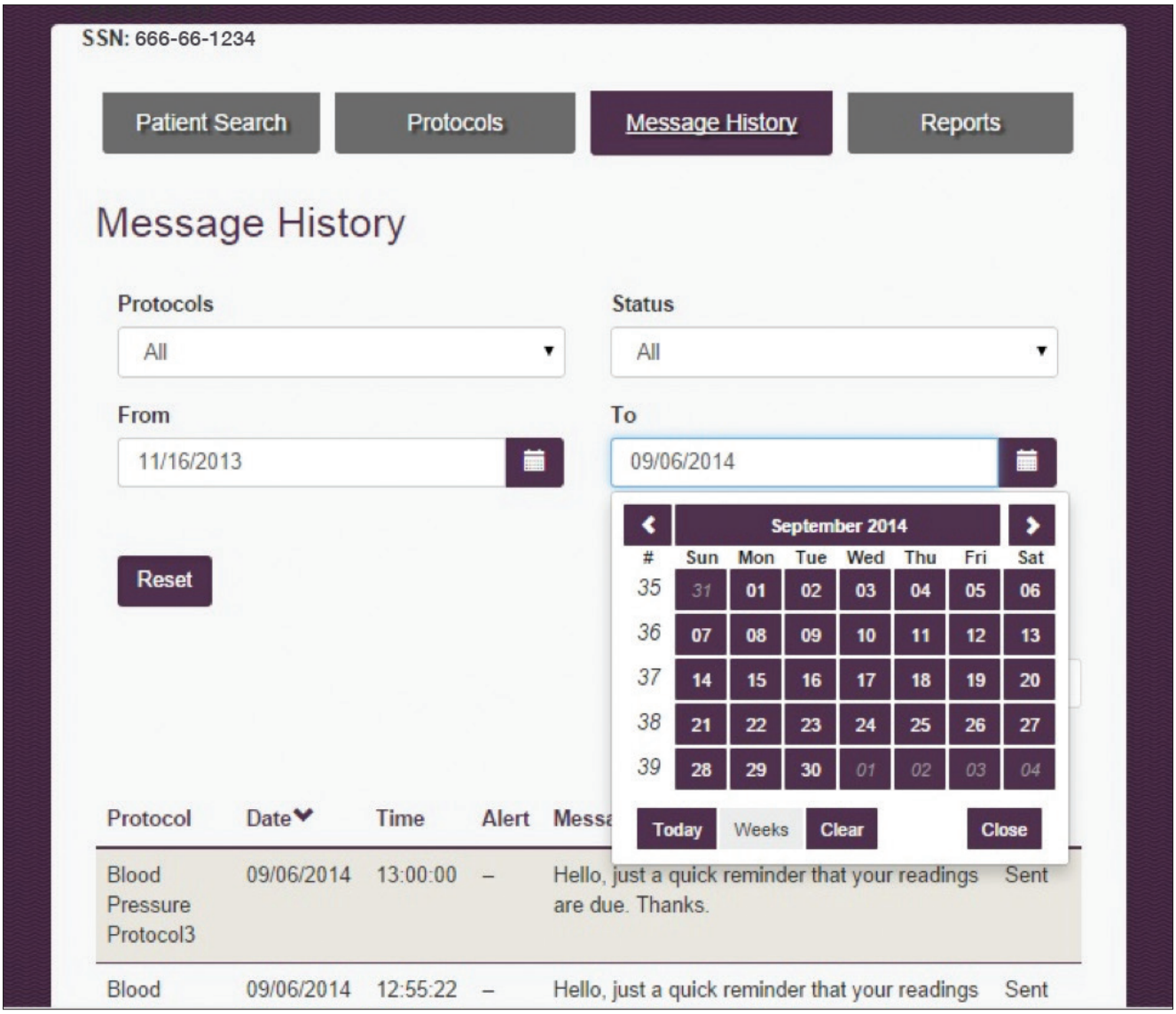
- Protocol – Name of the protocol.
- Date – Date the message was sent. Tap the **^** or **v** to change whether the messages will display from most recent to least recent.
- Time – Time the message was sent.
- Alert – A red diamond with an exclamation point will appear if the patient's submitted health data breaches the tolerance threshold for Critically High or Critically Low parameters set within the protocol template.
- Message – The actual contents of the message sent from either Annie or your patient.
- Status – Whether the message was sent or received by Annie.

Filtering message history

If you are looking for specific information or would only like to view part of the conversation between Annie and your patient, you can filter the message history by type and date. You can choose from:

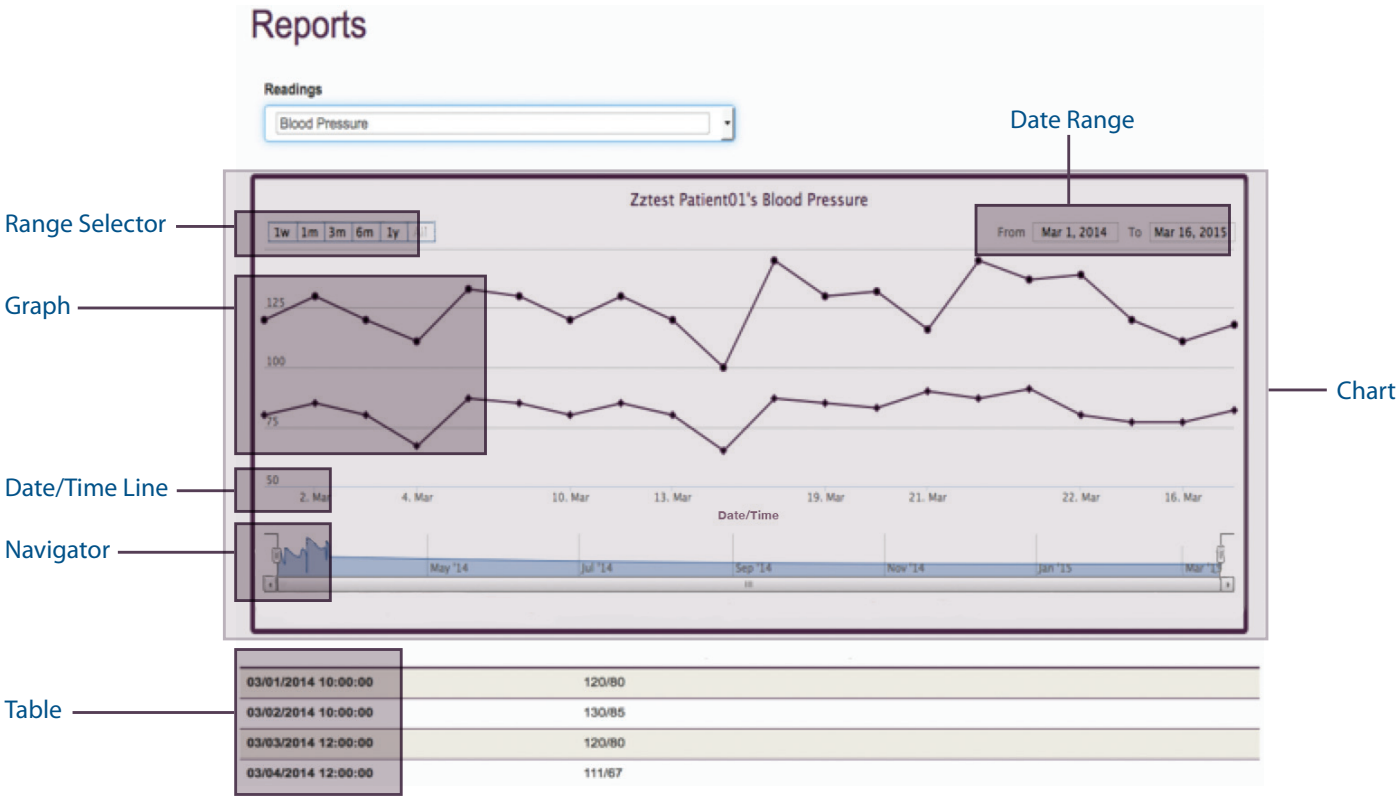
- Protocols – Tap the bar beneath the Protocols heading > A drop-down menu will appear > Tap either **All** or one of your patient's specific protocols.
- Status – Tap the bar beneath the Status heading > A drop-down menu will appear > Tap either **All, Sent** or **Received**.
- From – Tap the calendar icon or date beneath the From heading > A pop-up calendar will appear > Tap a date from where you would like the conversation to start.
- To – Tap the calendar icon or date beneath the To heading > A pop-up calendar will appear > Tap a date from where you would like the conversation to end.

The messages will update to reflect the filters. To go back to seeing every message exchanged between Annie and your patient, tap **Reset**.



Reports

Based on the readings a patient has sent to Annie, the Annie App for Clinicians will be able to display a report. The report consists of a chart and a table of a patient's readings information.



Viewing your patient's reports

First search for and select a patient whose reports you would like to view. Then tap the **Reports** tab > Tap the **Select Reading** bar under the Readings heading > A drop-down list will appear of the types of readings your patient sends > Tap the reading you would like to view > You will see the report.

The report consists of two sections – a Chart and a Table – and each shows the readings sent to Annie, and the date and time the information was sent:

- Chart – The Chart is the top section of the report. It includes a:
  - Range Selector – Six buttons side-by-side that are labeled 1w, 1m, 3m, 6m, 1y and All.
  - Date/Time Line – Horizontal line with dates and times that correspond to the data presented in the graph.
  - Navigator – Shaded blue area with vertical and horizontal scroll bars. The Navigator shows the entirety of data that your patient has sent to Annie for the selected reading.
  - Date Range – From and To boxes.
  - Graph – Line(s) with dots. You can hover over a dot on the graph, and a pop-up box appears with the date, time and the reading.
- Table – The Table is the bottom section of the report. It displays your patient's readings in table format.

Adjusting the reports

You can change the information shown in a report by adjusting the chart. There are three ways to modify the information in a specific report. When you adjust the chart's parameters (i.e., Range Selector, Date Range, Navigator), the changes will appear in the Graph, Date/Time Line, Navigator, Date Range and Table:

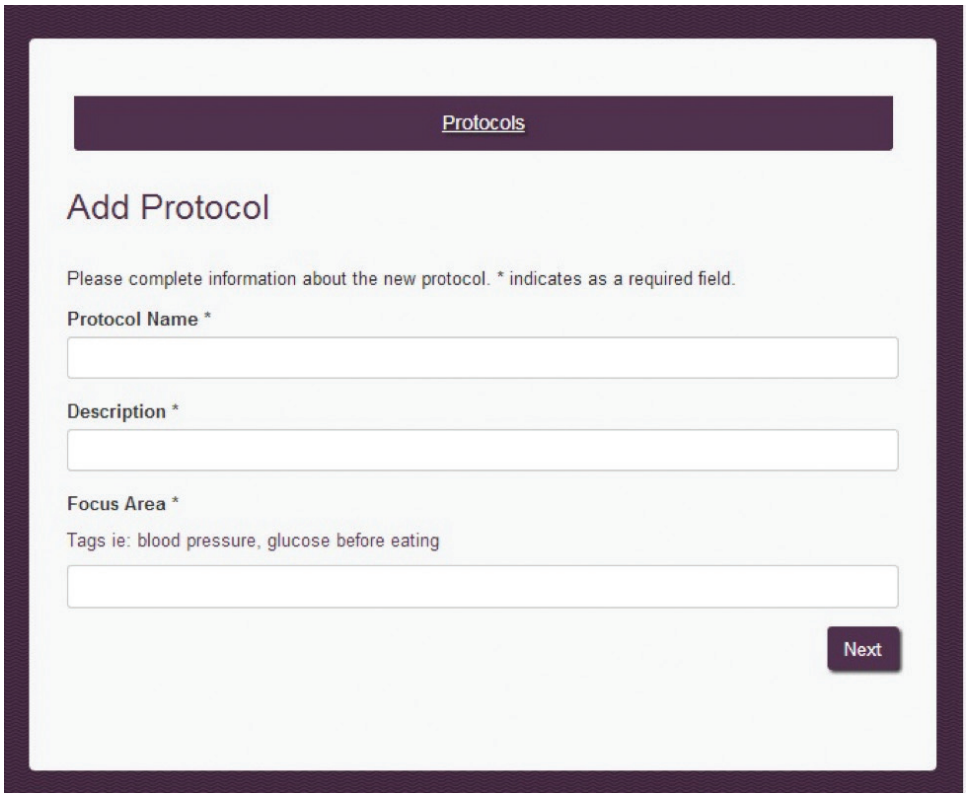
- Range Selector – Tap either **1w** (one week), **1m** (one month), **3m** (three months), **6m** (six months), **1y** (one year) or **All** to adjust the data covered in the report. **NOTE**: If your patient has not submitted adequate data, some buttons will not be available.
- Date Range – Tap the date in the From and To boxes in the upper right corner of the Chart, and type in a new date. This will update the data in the Graph, Date/Time Line, Navigator and Table.
- Navigator – Use the Navigator to adjust the readings shown in the Graph and Table. The Date/Time Line will change accordingly, as will the Date Range. If you tap an oval on the Navigator, you can shorten or lengthen the Date Range. If you move the horizontal scroll bar, you can slide to see the dates and data that fall within the set Date Range. For example, if you set the vertical bars so that the window of time is for two months, you can then use the scroll bar to move the two-month time frame from April-June to September-November.

KEY TAKEWAYS: As noted above, the entirety of data available for a reading is always shown in the Navigator. The graph data shown in the chart and the table depends on how you use the Range Selector, Date Range, and Navigator. Any one of these can be used to limit or expand the data shown. As an example, by dragging the leftmost oval on the Navigator to the right, less data is shown in the chart and table. The Date/Time Line is the horizontal line, or axis, for the chart and changes as the data being viewed is changed. The Date / Time Line is the horizontal reference for the data shown in the Graph section of the Chart.

NOTE: You may find problems when seeing readings using Reports. If you encounter difficulties, please do not limit the readings in the reports using the From/To Boxes, or the scroll bar and buttons.

Administrative View

When using the Annie App for Clinicians Admin View, you can add, audit and edit/view protocols. The protocols created can be assigned using the Staff View. **NOTE:** Admin View will show you all protocols that have been set up and are available for use. It does not currently have an option for searching by focus area or measurement reading.



Understanding protocols

Protocols use templates that collect and send information to your patient. Protocols can be accessed by any Annie App for Clinicians user, so you can use protocols other users have created. There are three types of protocol templates:

- Vitals – The Vitals template is to request and receive readings from patients, such as blood pressure. You will have the option for designating the lowest and highest feasible readings for patients in the Reading/Alerts section of the Vitals template. **NOTE:** Patients will receive alerts if their readings are below or above the thresholds you set, so be sure to create thresholds that are clinically relevant and that the alert messages you create tell patients what to do if their readings are too low or too high.
- Motivational/Educational – The Motivational/Educational template is to send messages to patients that do not request a response, but help motivate or educate patients. **NOTE:** Pre-drafted Motivational/Educational messages are not built into Annie; you will need to write messages or edit a protocol that has already created motivational/educational messages.
- Custom – A Custom template allows you to combine two or more of the other templates (i.e., Vitals and Motivational/Educational) to make a more complex protocol.

IMPORTANT: Messages sent to patients should NEVER reference Section 7332 information, which includes information pertaining to drug abuse, alcoholism or alcohol abuse, infection with the human immunodeficiency virus (HIV) or sickle cell anemia. VA's approval to use the system is conditional on the exclusion of this information.

Writing an ideal message

Each protocol has a message area, which you can draft in the Admin View and customize in the Staff View, and will be the exact message the patient receives. **REMEMBER:** Messages are designed to motivate and help patients improve their self-care, so write all messages in ways that are inspiring and friendly. Here are a few examples of ideal messages:

- Service Message = "Hi, it's Annie. Please take your Blood Pressure twice, average your readings, and send me the result in the following format: BP 120 80"
- Reminder Message = "Hi, it's Annie again. I haven't received your BP reading yet. Please send me the average of your two readings in the following format: BP 120 80"
- Message for Valid Reading = "I've got it. Thanks for sending your blood pressure reading. Annie"
- Message for Critical Low Level Alert = "Your BP is very low. The top is 80 or less, or the bottom is 50 or less. Please contact your health care team about your BP. Thanks, Annie"
- Motivational/Educational Message = "With a condition like high blood pressure, you are more important than your doctor. He or she just gives advice, but you must DO IT, which is harder. Annie"
- Motivational/Educational Message = "When measuring your BP, sit quietly and avoid talking for five minutes before you check. Take care, Annie"

If you request a Vitals reading, please include the format the patient should use to send in his or her reading within the Service and Reminder Messages. When a patient responds to a request from Annie to send in a reading (e.g., blood pressure measurement), the response MUST START with a keyword or abbreviation so that Annie understands the message. Annie uses these keywords to know what kind of information the patient is sending. The letters can be upper or lower case. Spelling has to be EXACT. Depending on the information the patient is sending, the message must begin with one of the following keywords or abbreviations (see terms in bold):

When Annie requests this information	The patient must start the message response with
Blood Pressure	**BP** or **BLOOD**
Pulse Oximetry (SpO2) or Oxygen level	**OX** or **OXYGEN**
Blood Glucose or Sugar	**BG** or **GLUCOSE** or **SUGAR**
Glucose Before Eating	**BGB** or **BEFORE**
Glucose After Eating	**BGA** or **AFTER**
Weight Loss	**WE** or **WEIGHT**
Caloric Intake	**CAL** or **CALORIES**
Amount of Exercise	**EXERCISE**
Temperature	**TEMP**
Pulse	**PULSE**

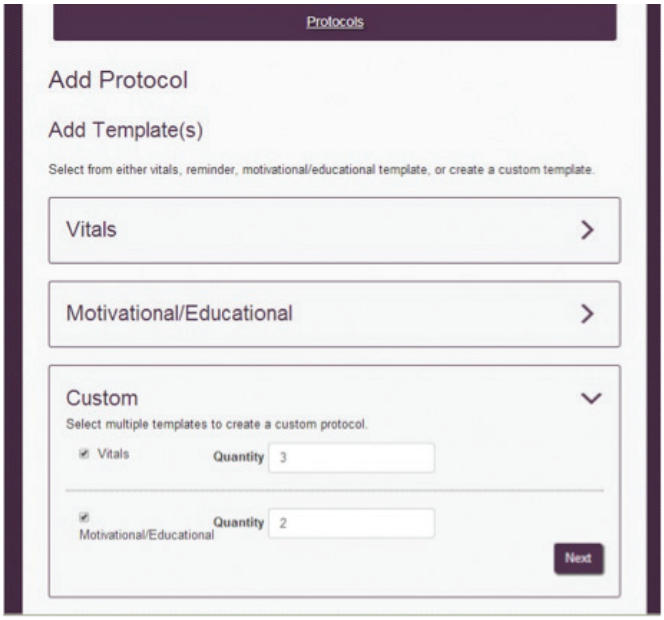
For example, if the request is to send in a temperature reading, then write the Service and Reminder messages to include the appropriate keyword or abbreviation. "Please send me your temperature in the following format: TEMP 98." If the patient responds without using the correct format, Annie will not understand the message.

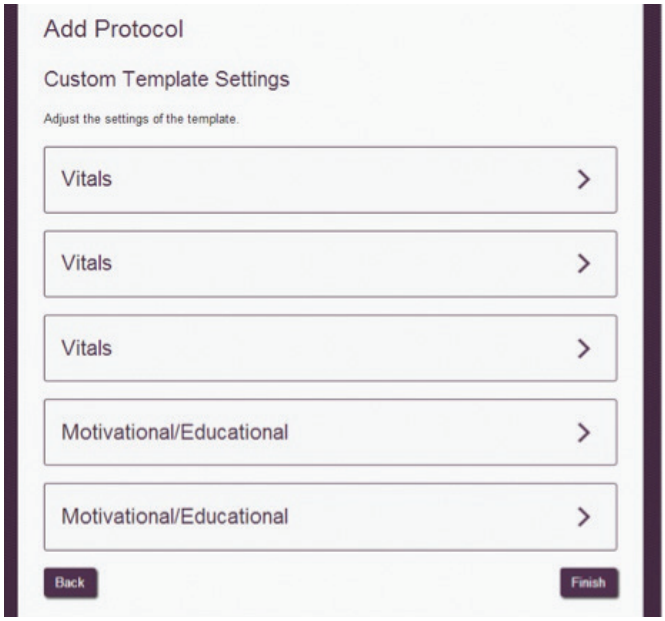
Adding a protocol

Tap **Add Protocol** > You will go to a Protocols screen > Type in the Protocol Name, Description and Focus Area (The Focus Area is like a tag that will help you categorize the protocol (e.g., blood pressure)) so that later you or other app users can search for the Focus Area and find all the protocols tagged with it when this capability is incorporated into Annie) > Tap **Next** > Tap **Add Template** (or to return to the previous screen, tap **Back**) > Tap one of the templates you would like to use:

- **Vitals** – The Vitals template is for requesting and receiving readings from a patient, such as blood pressure.
- **Motivational/Educational** – The Motivational/Educational template is for sending messages that are designed to help motivate or educate your patient. (These messages do not request a reading).
- **Custom** – A Custom template allows you to combine two or more of the other templates (i.e., Vitals and Motivational/Educational) to make a more complex protocol. Tap to check the boxes next to the type of template(s) you would like to include in your Custom protocol > Type in the quantity of each you would like to include from 1-20 > Tap **Next** > You will see the types and number of each protocol you chose > Tap on each of the templates to indicate their settings as you would with each singular template.

After selecting the type of protocol, you will need to complete the template settings for the protocol, and the format will depend on the type of protocol you selected. Tap the headings of the settings you may need to complete, which will expand the template details below > Set the details of the setting, usually by tapping to fill in a circle or to select an option from a drop-down menu (For more information, see the "Editing and viewing a protocol" section in Staff View) > Tap **Save** > A pop-up box will appear confirming that your changes have been saved > Tap **Finish** > A pop-up Success box appears that confirms you created a new template > Tap **OK**. You will be taken back to the Protocols screen.





IMPORTANT: (1) If you are adding a Vitals template, you have the option in the Schedule Settings to tap the circle next to Yes or No pertaining to whether you would like to receive any unscheduled readings from your patient. Please always ensure that Yes is selected so that Annie will respond appropriately to all messages sent by patients. **(2)** Please ensure that the threshold levels and messages for your Vital template are appropriate to your patient population and your medical facility's clinical procedures for providing care. **(3)** Creating a reminder message is not required, but is strongly recommended to help ensure your patient submits readings and receives the appropriate responses from Annie.

NOTE: The Start Period and End Period within the Schedule Settings pertain to the timeframe that the protocol will send messages after assignment to a patient in the Staff View. The timeframe is relative to the date the protocol is assigned to a patient. If the Start Period specified is one month, then the template will initiate one month after the date of assignment to a

patient. If the clinician assigns this protocol on May 1, then the Template Start Date in the Staff View will be June 1, and it will initiate messages on June 1. Similarly, the End Period is relative to the Start Period. If the End Period is two months, then that is two months after the protocol initiates. In our example above and with an End Period of two months, the Template End Date would be August 1 in the Staff View and the template would end on August 1. Importantly, the Start Period and End Period do NOT have an impact on the ability to disable a protocol.

NOTE: Validation warnings will convey whether or not you need to modify the information provided after you have added a new protocol and before you are able to save your changes.

Reviewing protocol edit history

Tap **Audit Trail** on the protocol whose edit history you would like to view > You will go to the protocol's Audit Trail screen > You will see an overview of the protocol, including:

- Edited On – Date the protocol was changed or updated.
- Edited By – Name of the VA clinical administrator who last updated or changed the protocol.
- Edited Time – Time when the protocol was last changed or updated.
- Template – Indicates the template in which the changes were made.
- Audit Trail/Comment(s) – Notes pertaining to the change in status of a protocol, which may be a comment from a clinical administrator, as well as all of the changes to the protocol organized by template.

To return to the Protocols screen, tap the **Protocols** heading.

Editing or viewing a protocol

If a protocol is enabled, you will be able to edit or view its details. Tap **Edit/View** under the protocol you would like to edit or view > You will go to the protocol's screen, which shows its name, description, focus area and template(s) you set up > Adjust the areas like you would when setting up the protocol > Tap **Save**. To exit without saving, tap **Cancel**.

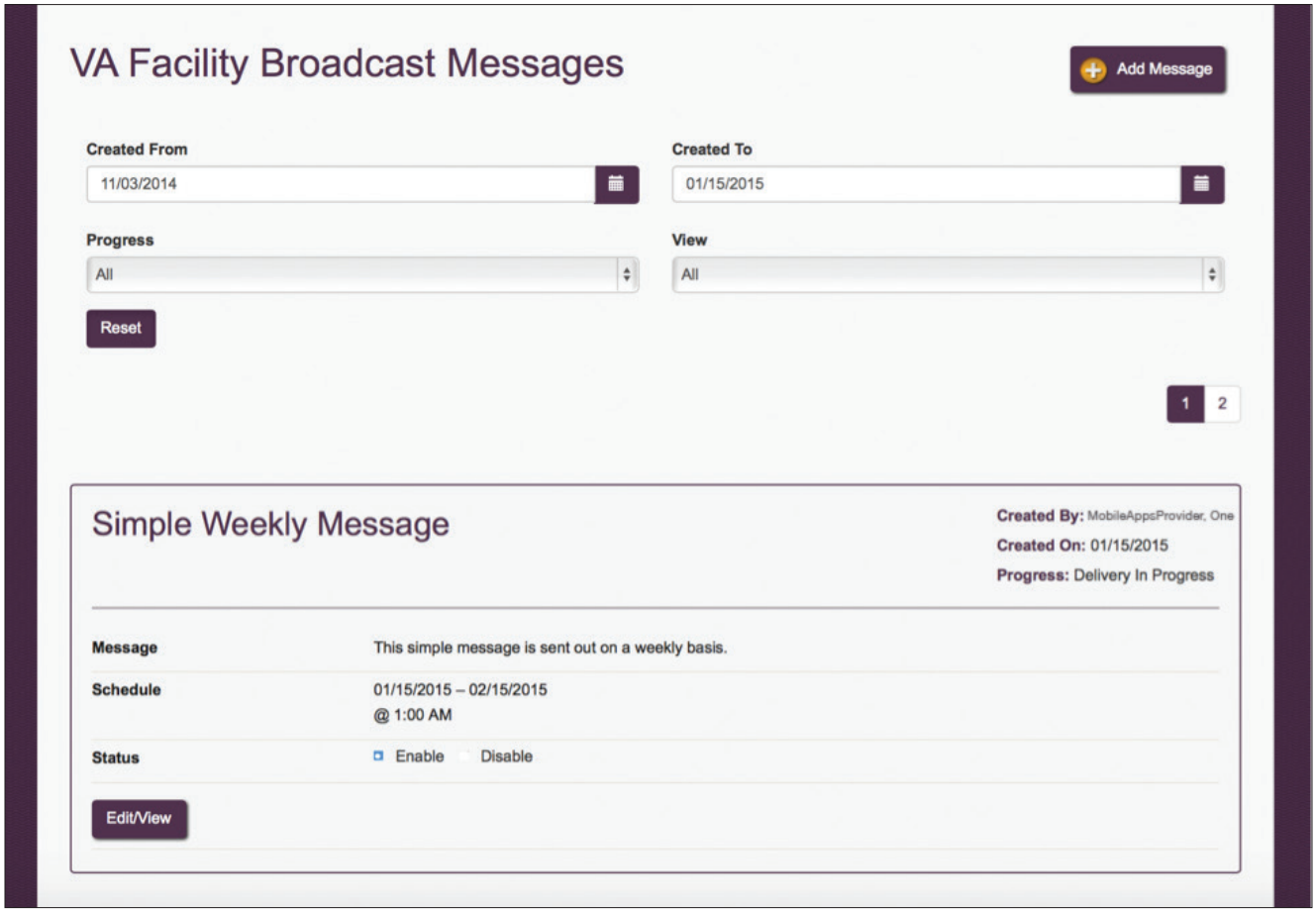
NOTE: Validation warnings will convey whether or not you need to modify the information provided after you have modified a protocol and before you are able to save your changes.

Enabling or disabling a protocol

Tap the circle next to either Enable or Disable > A pop-up box will appear asking if you are certain you want to enable or disable the protocol > Type in the reason for the change > Tap **OK**. **NOTE:** Once a protocol is disabled in Admin View, it cannot be assigned in Staff View.

Broadcast Admin

Broadcast Admin allows you to send messages on behalf of your VA medical facility to all patients who have subscribed to messages from your facility. **NOTE:** Only certain staff members designated by the facility will have Broadcast Admin rights.



Adding a Broadcast Message

To create a new broadcast message, tap **Add Message** > Type in the title up to 40 characters (the title will not be sent as part of the message) > Type your message up to 160 characters > Specify how often your messages should be sent by tapping the bar next to Schedule > A drop-down menu will appear, and tap either:

- **Once** – Your message will only be sent once based on the Send Message Time and Start Date.
- **Specified Days** – A "Select Days that Apply" section will appear > Tap the checkboxes next to the day(s) of the week on which you would like to send your message.
- **Custom** – A "Time Between Each Cycle" section will appear > Type in a number in the left bar > Tap the right bar, and tap either **Minute, Hour, Day, Week, Month** or **Year** from the drop-down menu that appears.

Under Send Message Time, tap on the bars to choose the hour, minutes and AM/PM from the drop-down menus that appear > Tap the bar under Start Date, and a pop-up calendar will appear > Tap on a date on the calendar to specify when you would like to start sending your message > Tap the bar under End Date, and a pop-up calendar will appear > Tap on a date on the calendar to specify when you would like to stop sending your message (If you would like to send your message only on one day, choose the same Start Date and End Date) > Tap **Save** > A Save pop-up window will appear confirming your changes have been saved > Tap **OK**.

NOTE: Validation warnings will convey whether or not you need to modify the information provided before you are able to save your Broadcast message.

Sorting your Broadcast Messages

After you have created messages, you can easily find them by using any or all of the filters on the Broadcast Admin main screen:

- Created From – Tap on the calendar icon > Tap on a date.
- Created To – Tap on the calendar icon > Tap on a date.
- Progress – Tap the bar beneath the Progress heading > A drop-down menu will appear > Tap either **All, Pending Delivery** (a message that has been created but not yet sent because it is before its scheduled delivery), **Delivery in Progress** (messages that reoccur and have begun being sent, but have not completed their cycle) or **Delivered** (messages have been delivered to recipients, and for reoccurring messages, there are no more messages in the series to send). For example, a Broadcast Message scheduled to be sent each day of the week at 9:00 AM has a status of Pending Delivery before the Start Date associated with the message. During the week of delivery, it has a status of Delivery in Progress. On the last day of the week after 9:00 AM, it will have a status of Delivered.
- View – Tap on the bar beneath the View heading > A drop-down menu will appear > Tap either **All, Created By Me, Enabled** or **Disabled**.

As you change the filters, the messages below will adjust accordingly. To go back to all of your messages, tap **Reset**.

Editing a Broadcast Message

You can enable or disable a message by tapping on either the **Enable** or **Disable** radio buttons in the Status row of a Broadcast Message's information. To edit a message, tap **Edit/View** > You will be taken to an Edit Message screen > You can edit the Title, Message, Schedule, Send Message Time, Start and End Date just as you would add a new message > Tap **Save** or **Cancel** to return to the Broadcast Admin screen.

NOTE: Validation warnings will convey whether or not you need to modify the information provided before you are able to save your edits to a Broadcast message.

Help and Additional Information

Additional training materials for the Annie App for Clinicians

More resources, such as a Quick Start Guide, Slideshow and FAQs, can be found on ***mobile.va.gov/appstore***, and search for the app to access the resources. To go to the site from the app, tap the **About** tab at the top of the screen, and tap the **Training Materials** hyperlink.

Help Desk Information

If you need technical assistance with the Annie App for Clinicians, dial **1-844-482-6624** to speak with a VA representative. The Help Desk is open weekdays from 7 a.m. to 7 p.m. CT. For TTY assistance, dial 711.

Emergencies

If you feel that you or your patient's information may have been compromised, contact your local VA medical facility to obtain the contact information for your Privacy Officer. To locate your local VA medical facility, visit VA's Facility Locator: at ***http://www.va.gov/directory/guide/home.asp?isflash=1***. **NOTE:** You should never use this app in an emergency situation.

Appendices

Appendix #1: Project References

This app was developed in collaboration with the United Kingdom's National Health Service according to an approved concept paper. The app was tested to ensure optimal functionality and based on a system in use by the United Kingdom's National Health Service. Subject Matter Experts for the Annie App development were: Neil Evans, MD; Susan Woods, MD, MPH; Keith McInnes, ScD; Beth Powell, RN; and many others.

Appendix #2: Glossary

App – an application or software program that can be accessed through a website or mobile device and is designed to fulfill a particular purpose

CPRS (Computerized Patient Record System) – a VA computer application that enables credentialed VA health care professionals to enter, review and update all the information connected with any patient

Protocol – template of rules governing the information patients receive and send to Annie

VA – Department of Veterans Affairs

VA Mobile Health – an initiative that aims to improve Veterans' health by providing technologies to expand care beyond the traditional office visit and that includes the creation of secure mobile apps to leverage the popularity of wireless technologies to support Veterans, Caregivers and VA care teams [More at: mobile.va.gov]