OCULUS Patient Logging Network – PLN

User guide

August 2020

PLN is a digital logbook that is used in optometry education for registration of patient cases and student follow-up. The software for the logbook is freely available. More information on the installation and use of it is given below.

Content

1. Introduction

The *Patient Logging Network* (PLN) was developed by the Erasmus+ co-funded project **OCULUS** - *Optometry CUrriculum for Lifelong Learning through ErasmUS*, see https://www.oculuserasmus.org/project/pln-patient-logging-network/ for more information.

The PLN may be accessed through a web page hosted by University of South-Eastern Norway (USN) or can be downloaded as a virtual machine under the Creative Commons licence 4.0. The PLN follows the GDPR regulations and patient confidentiality clauses. No personal data about the patient is stored.

In short, you are free to:

- Share — copy and redistribute the material in any medium or format as long as the GDPR regulations are not violated.
- Adapt — remix, transform, and build upon the material

The Licensor offers the Licensed Material as-is and as-available, and makes no representations or warranties of any kind concerning the Licensed Material, whether express, implied, statutory, or other. This includes, without limitation, warranties of title, merchantability, fitness for a particular purpose, non-infringement, absence of latent or other defects, accuracy, or the presence or absence of errors, whether or not known or discoverable.

2. User roles

Global super user: The Global super user have access to add/deactivate Local Super users for Institutions, but will not have access to see the users added by the Local super user or any of the local courses or registrations made by students.

Local super user: The Local super user have access to add/deactivate users at all levels and assign them to their courses, and to add/edit institutional courses, examination categories and codes for types of patient exposures. The Local super user also have access to the Teacher level and the Student level. The Local super user have access to statistics from student registration for all courses.

Teacher: The Teacher has access to add/deactivate Students and other Teachers to courses they are themselves enrolled as Teacher. The Teacher also has access to the Student level. The Teacher user has access to statistics from student registration for the courses they are enrolled as Teacher.

Student: The student has access to registration of patient encounters and to statistics from their own data.

3. Instructions for access

Access

- For your institution to use the PLN you need to request access by e-mailing mb-usn.logbook@usn.no.
- You will need to provide the name of your institution, and the name and e-mail address of the person who will be the local (institutional) super user. You will be given a password that you should change.
- The PLN is found on this url: http://optometry-eportfolio.usn.no/

Access virtual machine

- You will need to download the software from Dropbox (we will provide a link by e-mail).
- Read the "Read_me"-file and follow the steps.
- Run the virtual machine on a server.
- The institutional super user and the name of the institution must be inserted to the MySQL database through the phpmyadmin page.

## 4. Instructions for using PLN as Local super user

Login page

In the login page you will need to enter:
- Username (the e-mail address you have chosen).
- Password (given to you).

If you have forgotten your password, please contact the super user via the e-mail address provided in.

If you have downloaded PLN as a virtual machine, please consult the "read_me"-file if you have forgotten your password.

You are advised to change the initial password given to you.
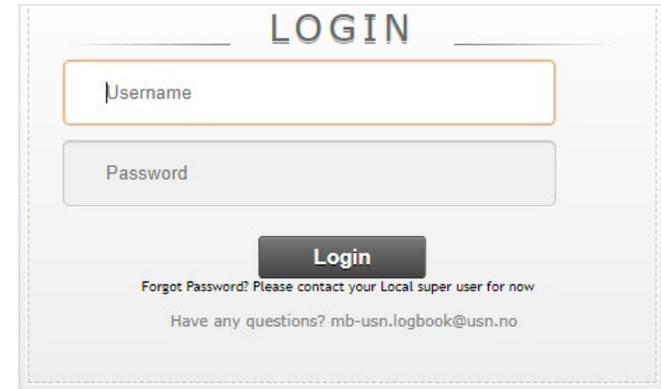
Main menu

The main menu contains (see details on the next pages):
- Who is logged in with their associate role.
- Where to view all users.
- Where to add users.
- Where to edit users.
- Details of the person logged in (Mypage).
- Categories for type of examination, dispensing etc*.
- Codes for types of patient encounters*.
- Courses using the PLN*.
- Place for where the patient encounter occurred.

* All institutions have a common course which reflects the portfolio of the European Diploma of Optometry (https://www.ecoo.info/). This course is added by default and is labelled ED. All the corresponding categories and codes have been added to the PLN and they cannot be edited or removed by the institutions. They are visible also for courses that an institution would want to add. You are advised to look at these categories and codes in the registration page (change access level to Student) before adding other categories and codes.

Users

This part of the main menu shows:
- Where to view all users. You can search for users (here the user Teacher Teacher), or put your cursor in the text field to view all users categorised by Local super user, Teacher, and Student.
- Where to add users by clicking on the text line.
- Where to edit users by clicking on the arrows at the right.
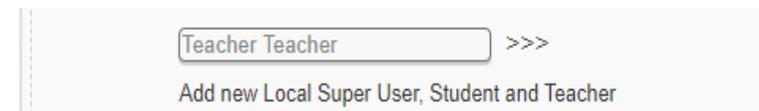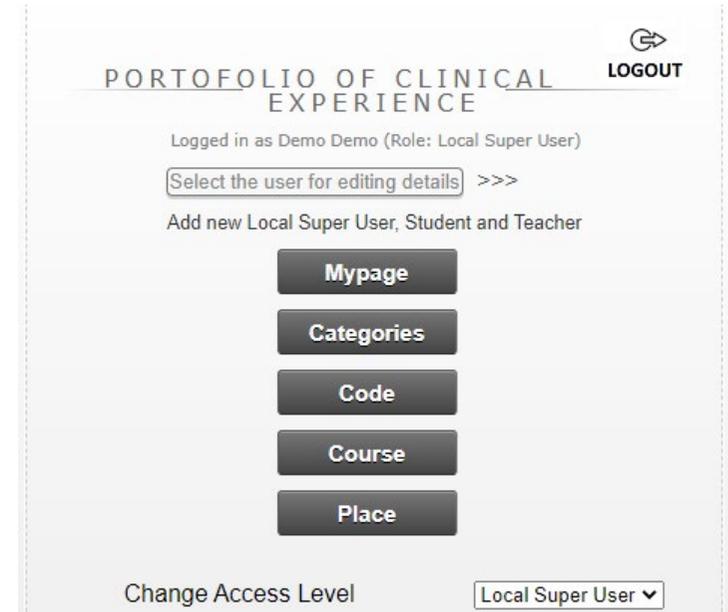
Add new user:
- Use an e-mail address that the user has access to (this cannot be changed later).
- Enter first and last name.
- Choose course. Note: the ED course is there by default. If you want another course, then the course must be added to the Course list (see below) before you can assign that course to the user.
- Choose role: Local super user, Teacher or Student. Note that you cannot upgrade to a higher level later. If you later want to give a Teacher access to be a Local super user, you will need to enter the user again. We advise you to keep the number of super users to a minimum of users.
- Your own institution name is default if you use the PLN hosted by the USN. In these examples, the local institution is represented by USN (and not referring to the server host).

- Note: Teachers and Students can be added by a Teacher that has been enrolled in the course. Each institution should decide who is responsible for entering Teachers and Students.

Edit user:
- You can edit name.
- You can add courses by clicking on the course, but you cannot remove courses. The courses will update when you press save.
- You can change to a lower level role and later change back (e.g. between Teacher and Student), but you cannot upgrade to a higher level role than the initial role later. If you later want to give a Teacher access to be a Local super user, you will need to enter the user again.
- You deactivate user by choosing "No" in the field for Access to Logbook.
- Username cannot be changed.
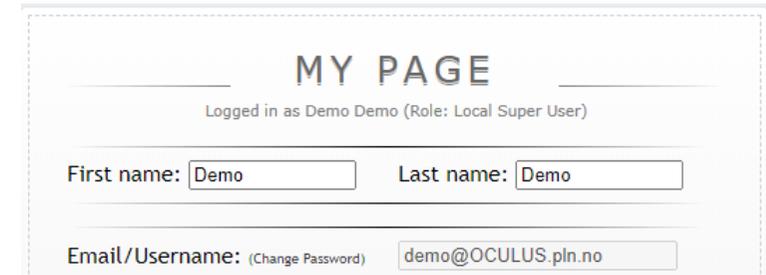- Password is automatically generated, and the user should change it in Mypage. The Local super user will be able to see the new password.

My Page

- The user can change their name.
- The username cannot be changed.
- The password can be changed by clicking on "Change password".

Categories and codes

The categories describe the type of examination, dispensing etc.

The codes describe the types of patient encounters.

See the registration pages for all the categories and codes that are entered by default to represent categories and codes of the European Diploma of Optometry (ED). It is advised to do that before entering new ones.

- When you hover over the button, you will have the option to add category/code, edit category/code and view categories/codes.
- Add category/code: The category/code name should be an abbreviation. In the registration page the category/code description will be visible to help the student register the right category/code.
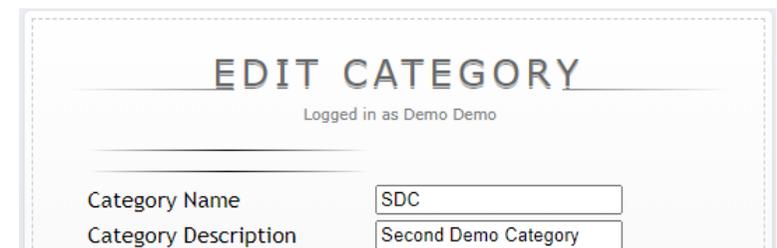- In the view option you will see only the local (institutional) codes.
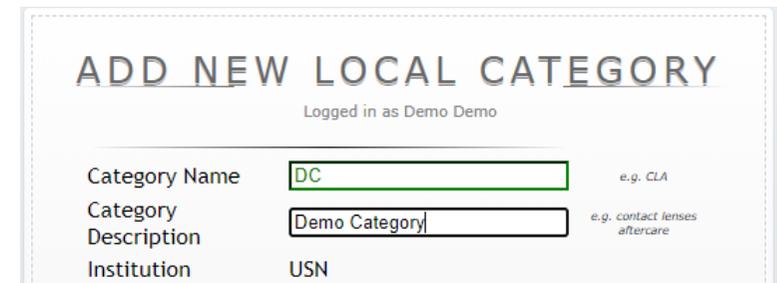
Course

European Diploma of Optometry (ED) is a default course, but other courses can be added as needed.

- When you hover over the button, you will have the option to add courses, edit courses and view courses.
- Here is an example where the default course (ED) and a local course (MPRA 4119) are listed.

Place

Place for where the patient encounter occurred.
- When you hover over the button, you will have the option to add places, edit places and view places.
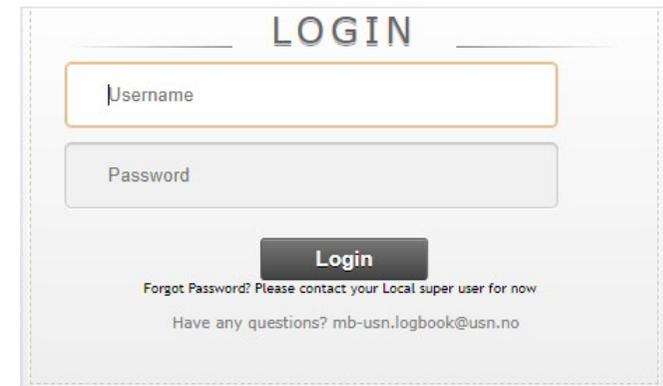

5. Instructions for using PLN as Teacher

Login page

In the login page you will need to enter:
- Username (the e-mail address you have chosen).
- Password (given to you).

If you have forgotten your password, please contact the Local super user.

You are advised to change the initial password given to you.

Main menu

The main menu contains (see details on the next pages):
- Who is logged in with their associate role.
- Where to view users (Teachers and Students in the same courses that you are enrolled as a Teacher).
- Where to add users.
- Where to edit users.
- Student Statistics-
- Details of the person logged in (Mypage).

Users

This part of the main menu shows:
- Where to view all users in the courses you are enrolled in as a Teacher. You can search for users (here the user Student Student), or put your cursor in the text field to view all users categorised by Teacher and Student.
- Where to add users by clicking on the text line.
- Where to edit users by clicking on the arrows at the right.

Add new user:
- Use an e-mail address that the user have access to (this cannot be changed later).
- Enter first and last name.
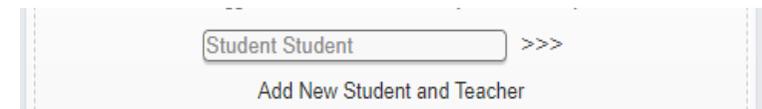
- Choose course. Note: the ED course is there by default. If you want another course, then the course must be added to the Course list before you can assign that course to the user.
- Choose role: Teacher or Student. Note that you cannot upgrade to a higher level later. If you later want to give a Student access to be a Teacher, you will need to enter the user again.
- Your own institution name is default if you use the PLN hosted by the USN. In these examples, the local institution is represented by USN (and not referring to the server host).

Edit user:
- You can edit name.
- You can add courses by clicking on the course, but you cannot remove courses. The courses will update when you press save.
- You deactivate user by clicking No in the field for Access to Logbook.
- Username cannot be changed.
- Password is automatically generated, and the user should change it in Mypage. The Teacher will be able to see the new password.

EDIT USER

Logged in as Teacher Teacher

First name   Student
Last name   Student

Course name   ED

Amend course   ED
                  MPRA 4119
                  OKOP2019

Role   Student
Institution name USN

Access to Logbook: Yes
Username: demostudent@OCULUS.pln.no
Password: 79582023

Back   Save

Student Statistics

The Teacher can look at student statistics in different ways through the main page.
- Filter on course: choose course and click the arrows to get an overview of all students in that course.
- Filter on student: will get an overview similar to what has been described for students in *6. Instructions for using PLN as Student.*
- Filter on category.
- Filter on code.
- Pdfs are available.
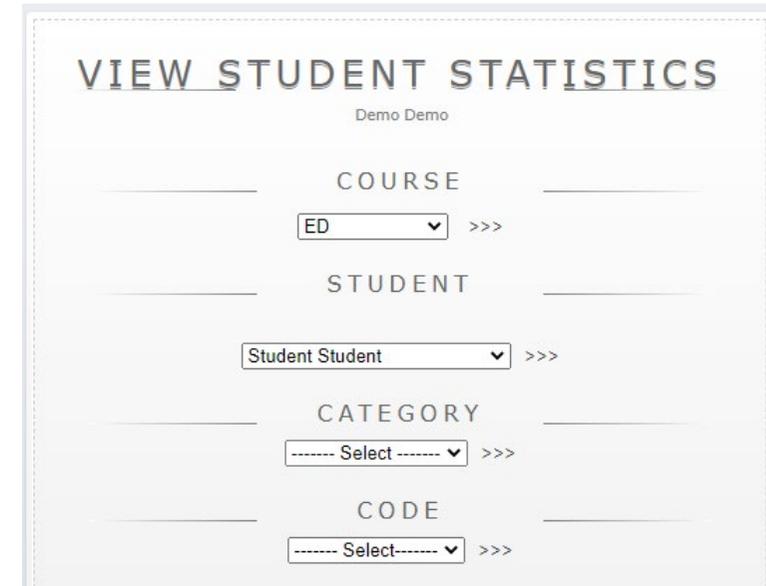
My Page

- The user can change their name.
- The username cannot be changed.
- The password can be changed by clicking on "Change password".
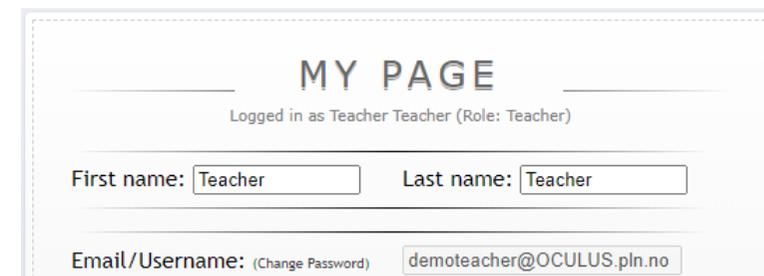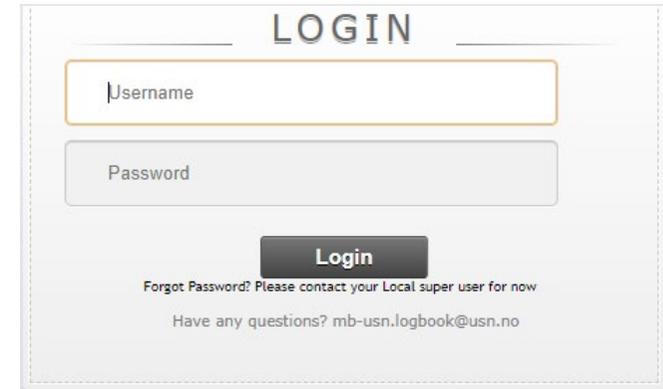
6. Instructions for using PLN as Student

Login page

In the login page you will need to enter:
- Username (the e-mail address you have chosen).
- Password (given to you).

If you have forgotten your password, please contact the Local super user or the Teacher in the course you are enrolled.

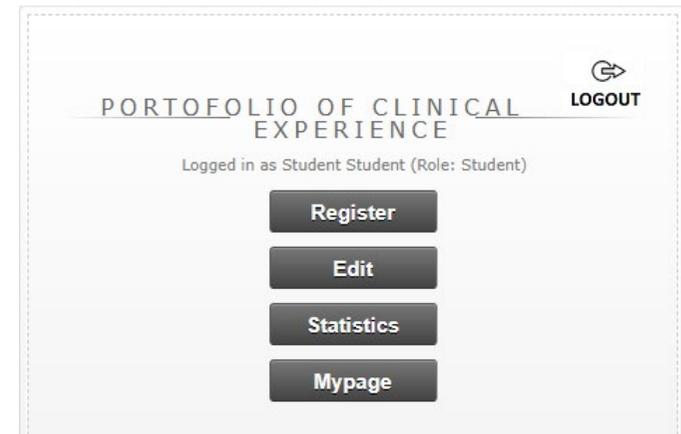You are advised to change the initial password given to you.

Main menu

The main menu contains (see details on the next pages):
- Who is logged in with their associate role.
- Where to register patient encounters.
- Statistics.
- Details of the person logged in (Mypage).

Registration of patient encounters

The registration page contains:
- Date for examination.
- Patient ID.
- Patient age.
- Where examination took place (drop down menu).
- Which course the student is enrolled in (drop down menu).
- Category and codes. Lists of categories/codes showing abbreviation and full description are available by clicking in the open field, or by hovering across the blue symbol. It is also possible to add a letter and all the categories/codes containing that letter are filtered out. It is possible to choose several categories/codes if applicable to the case.
- Additional case details may be entered if warranted.
- This 7 year old patient came to the clinic for a general eye examination (EE), with the codes showing s/he has a binocular vision problem (BV), cycloplegic drugs (DR) were used and sh/e is younger than 12 years old (CHD12, this is a criterion for the ED portfolio).

PORTFOLIO OF CLINICAL EXPERIENCE

Logged in as Student Student (Role: Student)

Institution: USN

Date: 2020-08-18   Patient ID: 55798662   Age: 7

Place: University Clinic   COURSE: ●
ED

CATEGORY: ●   CODES: ●

× EE   × BV × CHD12 × DR

ADDITIONAL CASE DETAILS

Additional details about the case if warranted. Ensure that patient confidentiality is not violated.

Back   Save

Edit the patient encounter
- Press Edit on the main page and make the changes in the next window.

Statistics

The student can look at their own statistics through the main page.
- Select the relevant course.
- Categories show which types and number of examinations has been registered. Here there are two general eye examinations (EE)
- Codes show types and number of clinical experiences (note that one patient may be registered with several codes). Here there has been one exposure of respectively diabetic retinopathy (F83), cataract (F92), referral to an ophthalmologist (REFO) and reduced visual acuity (RVA). In addition there are one exposure of BV, DR, CHD12, which is at the bottom of the list, but hidden in the screenshot.
- It is possible to download a pdf of the statistics with tables showing Summary of examination and dispensing categories, Summary of patient encounters including codes for diagnoses, and List and number of patients.

MY STATISTICS

Select Course [Select ∨]

Statistics for Student: **Student Student** for the Course Name: **ED**

Categories	Total
EE ↻	2
Total	**2**

Codes	Total
F83 ↻	1
F92 ↻	1
REFO ↻	1
RVA ↻	1
Total	**7**

Download pdf based on filter

Back

My Page

- The user can change their name.
- The username cannot be changed.
- The password can be changed by clicking on "Change password".