

Quick-start instructions for clinicians setting up operation-specific PROM tracking.

First login: use demo first, then add real patients after MFA.

OrthoMetrics tracks PROMs against operation episodes. The app suggests PROMs and follow-up timepoints once you choose the procedure, then shows only exceptions on the Dashboard.

Your first 10 minutes

- 1 **Sign in.** Open the welcome modal or Dashboard.
- 2 **Explore demo patient.** Review the sample operation, PROM history, consent preview, and report.
- 3 **Set up Authenticator MFA.** Required before saving real patient data.
- 4 **Check Settings.** Confirm profile, surgeon access, and dashboard preferences.
- 5 **Add or import a patient.** Use + Add Patient for one person, or Import Data for a theatre list.

Daily workflow

- 1 **Start on Dashboard.** Review due PROMs, overdue PROMs, consent tasks, operative detail gaps, and delivery issues.
- 2 **Open the patient.** Check you are on the correct operation episode.
- 3 **Send consent.** Preview SMS/email, send both or one channel, or record verbal consent.
- 4 **Let automation run.** Email is preferred; SMS is fallback when configured.
- 5 **Use Reports.** Build cohorts, check data quality, and export governed datasets.

Where do I go?

NEED TO...	USE...	REMEMBER
Add one patient	Patients > + Add Patient	NHI format is AAA1111. Real data requires MFA.
Import a theatre list	Dashboard or Patients > Import Data	Review highlighted rows before creating records.
Add PROM tracking	Patient record > Add Operation	PROMs are selected per operation episode.
Send consent	Patient record > Send Consent	Preview messages first. Demo patients do not send real messages.
Chase non-response	Dashboard > Today	Open patient, mark reviewed, or record unable to contact.
Create a dataset	Reports	Use cohort filters and governance fields before export.

Safety reminders

- Do not use real patient data for practice or testing.
- Check the selected operation before recording or sending a PROM.
- Do not delete history to clear a dashboard item; archive where appropriate.
- Missing PROM data is not proof of clinical status.

Billing basics

- Public operations are free.
- Private and ACC operations count only when PROM collection starts after consent.
- Draft patients and pending consent do not consume capacity.
- Billing belongs to the operation consultant.