

3d Unity – User Guide

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Introduction

Unity is 3d's secure online portal.

It enables 3d to upload Physiotherapy referrals to its suppliers. The supplier will be able to view all referrals sent by 3d and track case progression.

1. Glossary of Terms

Name	Description
Business Administrator	The Supplier will be referred to as the Business Administrator in this document.
User	The therapist will be known as the User in this document
Dashboard	The first screen that appears once logged into Unity. This is where cases are stored in the relevant icon dependent on case status.
Referral	The request from 3d to commence treatment.
Appointment	Appointment information for Initial Assessment date and rescheduled appointments.
Allocation / Re-Allocation	A case that is to be assigned to a user or assigned from one User to another.
Reports Assessment Report	The prepopulated report stored against each referral to be completed after the Initial Assessment has taken place. Only the User can complete a report
Reports Treatment Report	The prepopulated report stored against each referral to be completed after the treatment has taken place. Only the User can complete a report.
Archive / History	A case that is no longer active. This may be that the case is cancelled or treatment has concluded.
Link / Hyperlink	A link from a document which will take the User to another location, activated by clicking on a highlighted/underlined word
Icon	The radio button displayed that when clicked direct the User to information or sub category.
Authorisation	Authority to complete or continue treatment from 3d

2. Process Overview

The table below shows how information is communicated at the individual touch points as a Unity and Non-Unity user. It also contains information on where a case will be located in the Dashboard.

Touch Point	Current Process – Non Unity User	Process when registered to use Unity
Referral	Referral forwarded to the Business Administrator by email from 3d	The referral will be forwarded by email to the Business Administrator. The referral will be displayed in the Case Awaiting Allocate/Appoint icon.
Appointment Notification and Change of Appointment	The Business Administrator or User email 3d with appointment or change of appointment information.	When appointment information is input into Unity, 3d will be updated automatically. There is no requirement to email 3d with this information.
Report Submission	The Business Administrator or user forward this to 3d via email	The user completes the report using Unity. Clicking submit forwards the report to 3d. There is no requirement to send the report via email to 3d.

Case On Hold	3d notify the Business Administrator by email.	3d will notify the Business Administrator by email. The case will be displayed in the Cases on Hold icon.
Case Off Hold	3d notify the Business Administrator by email	3d will notify the Business Administrator by email. The case will be displayed in the relevant stage of progression icon i.e. Awaiting Assessment.
Case Cancelled	3d notify the Business Administrator by email.	3d will notify the Business Administrator by email. The case will be displayed in the Pending Cancellation icon.
Treatment Authorised	3d notify the Business Administrator by email	3d will notify the Business Administrator by email. The case will be displayed in the relevant stage of progression icon i.e. Awaiting Assessment.
Treatment Not Authorised	The Business Administrator and user are not notified	Notification is not forwarded from 3d. The case will be displayed in the Reports History section and is no longer displayed in the Awaiting Authorisation icon.
Invoice	The Business Administrator forwards this by email.	The Business Administrator to continue to forward this by email.

3. Unity Dashboard

The dashboard interface includes a top navigation bar with a search function and a main menu. The central area displays a grid of six cards representing different case statuses. Callout boxes provide detailed descriptions for each element.

Case Status	Count
Awaiting Allocation / Appointment	0
Awaiting Assessment	7
In Treatment	53
Awaiting Authorisation	12
Cases On-hold	8
Pending Cancellation	13

Callout Boxes:

- Ability to search for a specific claimant (Search by Name)
- Username and 'Log off' function displayed (Hello, me1s1 | Log off)
- Menu options to navigate (Home, Supplier, Therapist, Reports)
- Number of cases 'Awaiting Allocation / Appointment' are displayed (0)
- Numbers of cases currently 'Awaiting Assessment' are displayed (7)
- Numbers of cases currently 'In Treatment' are displayed (53)
- Number of cases 'Awaiting Authorisation' – Post Assessment / Treatment are displayed (12)
- Number of cases 'On Hold' displayed (8)
- Number of cases 'Pending Cancellation' - Awaiting a report to be completed (13)

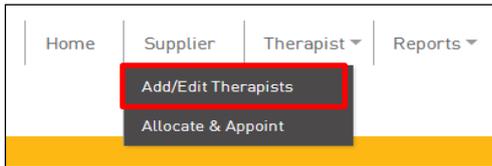
Footer: About | Contact Us | Terms and conditions | Privacy policy | User Guide | Registration Guide | © 2017 Premax Group | Version: 2.0.0.0

4. Adding a New Therapist / De-activation of a Therapist

Adding a New Therapist

The Business Administrator can add a User to a venue by following the steps below. A user can be added to multiple venues.

- Select Supplier from the menu button on the dashboard. Select Add / Edit Therapist from the options available under the supplier header.



- Select Add Therapist from within the Therapist screen.



- Enter User information details, within the Add Therapists screen, once completed select Create.

Add Therapist

Therapist Name

HCPC Number

Email Address

Upload Signature

Available Venues

Input the Therapists name.

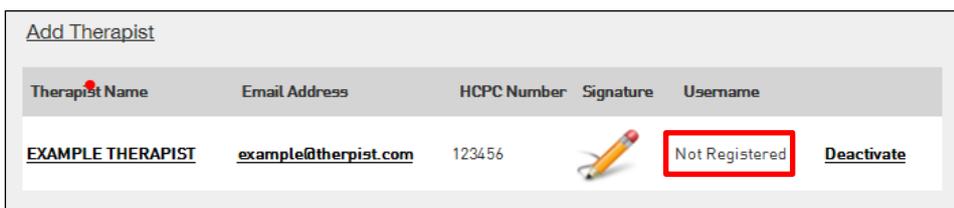
Input the Therapists HCPC number.

Input the Therapists email address. P.N Each Therapist needs an individual email address in order to receive a registration link.

Ability to upload a signature here or alternatively leave this section blank and the therapist name will be typed at the end of the report in place of a signature.

Business Administrator must allocate a user to a venue address by clicking the 'none selected' drop down list. Once clicked, all available venues will be displayed with ability to select Business Administrator must select each venue that the User works at. If there are any new venues to be added or removed, please contact 3d Panel Management

The Business Administrator will be taken back to the Add Therapist screen. A list of all Therapists will be displayed, including the registration status.

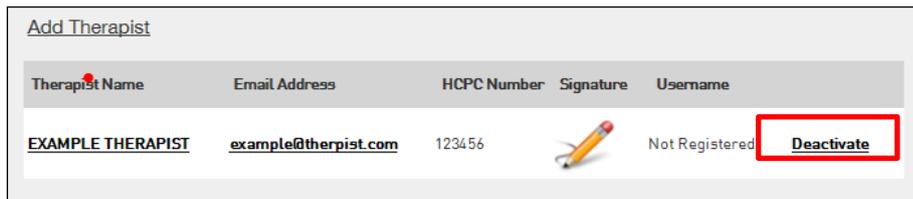


By clicking on the name of the therapist the Business Administrator will have the ability to edit any user details. Only once the User has completed the registration process will the system allow the Business Administrator to allocate referrals to the User.

Should a Business Administrator also be a User, then both a Business Administrator and separate User profile will need to be created. A unique email address will be required for each registration.

De-activation of a Therapist

Should a User no longer work at the practice they will need to be deactivated within Unity, this can be done by clicking on the 'Deactivate' hyperlink as shown below:



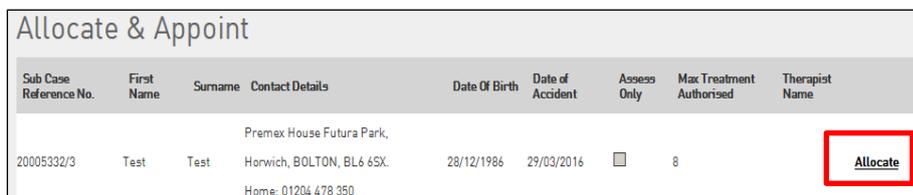
If a User has referrals allocated to them, they will need to be completed by the User.

If the User will not be completing the referral, then the case should be re-allocated to another User for completion

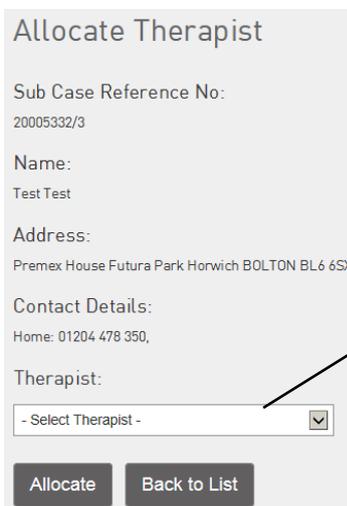
5. Allocating a Referral

Once registration is complete, the Business Administrator will receive referrals via Unity. These will be displayed on the Dashboard under 'Allocate and Appoint'. Only the Business Administrator has the rights to allocate a referral.

By selecting the 'Allocate & Instruct' icon the following screen is displayed:



Select 'Allocate' to allocate a user to a case, once selected the following screen is displayed:



Select the user the case is to be allocated to and select confirm to action

6. Book Appointment

Appointments can be booked by either the Business Administrator or a User.

An appointment can be booked immediately following allocation or re-allocation. By selecting the 'Allocate & Instruct' icon the following screens are displayed:

Sub Case Reference No.	First Name	Surname	Contact Details	Date Of Birth	Date of Accident	Assess Only	Max Treatment Authorised	Therapist Name
20006642/8	Arya	Stark	Premex House Futura Park, Horwich, BOLTON, BL6 6SX. Mobile: 23456789	05/06/1996	05/06/2017	<input type="checkbox"/>	8	Lianne Stott

Select 'Book' to input an appointment, once selected the following screen is displayed:

Book Appointment

Sub Case Reference No:
20006642/8

Name:
Arya Stark

Address:
Premex House Futura Park Horwich BOLTON BL6 6SX

Contact Details:
Mobile: 23456789,

Appointment:

By clicking in the appointment box, the calendar will be displayed.

June 2017

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Time **11:10**

Hour

Minute

21/06/2017 11:10

Input the appointment details and select 'done'.

Book Appointment

Sub Case Reference No:
20006642/8

Name:
Arya Stark

Address:
Premex House Futura Park Horwich BOLTON BL6 6SX

Contact Details:
Mobile: 23456789,

Appointment:
21/06/2017 11:10

[Book](#) [Back to List](#)

Select book to complete.

7. Re-Book Appointment

Appointments can be re-booked by either the Business Administrator or a User.

Select the re-book hyperlink from within the 'Awaiting Assessment' screen.

Awaiting Assessment

Sub Case Reference No.	First Name	Surname	Contact Details	Date Of Birth	Date of Accident	Assess Only	Max Treatment Authorised	Therapist	Appointment	
20006511/6	Dave	Smith	Aspinall House Aspinall Close, Horwich, BOLTON, BL6 6QQ. Home: 01204 000 000 Premex House	01/04/1980	01/01/2017	<input type="checkbox"/>	4	Pappa Kilo	12/12/2017 12:00	Report Re-Allocate Re-Book

Appointments can be re-booked

Select the 'Re-book' hyperlink, and follow the same process as 'Book Appointment'. The appointment details will then be updated.

8. Completing an Assessment Report

Only a User is able to complete and submit these.

Report templates are prepopulated and will require the User to respond to questions with yes or no responses.

A dropdown box will appear for further information where required.

By selecting the 'Awaiting Assessment' icon the following screen is displayed:

Awaiting Assessment

Sub Case Reference No.	First Name	Surname	Contact Details	Date Of Birth	Date of Accident	Assess Only	Max Treatment Authorised	Therapist	Appointment	
20006511/6	Dave	Smith	Aspinall House Aspinall Close, Horwich, BOLTON, BL6 6QQ. Home: 01204 000 000 Premex House	01/04/1980	01/01/2017	<input type="checkbox"/>	4	Pappa Kilo	12/12/2017 12:00	Report Re-Allocate Re-Book

- Report can be completed and submitted.
- Cases can be re-allocated to an alternative user.
- Appointments can be re-booked

9. Completing a Treatment Report / Further Treatment Report

Completing a Treatment Report

Only a User can complete and submit these.

Report templates are prepopulated and will require the User to respond to questions with yes or no responses.

A dropdown box will appear for further information where required.

By selecting the 'In Treatment' icon the following screen is displayed:

In Treatment

Sub Case Reference No.	First Name	Surname	Contact Details	Date Of Birth	Date of Accident	Assess Only	Max Treatment Authorised	Therapist	Appointment	
20002756/1	Andrew	Rohden	56 Montserrat Road, BOLTON, BL1 5TU. Mobile: 07752913775 Premex House	13/10/1983	20/10/2015	<input type="checkbox"/>	4	Lianne Stott	29/03/2017 00:30	Report Re-Allocate

- Report can be completed and submitted.
- Cases can be re-allocated to an alternative user.

Completing a Further Treatment Report

Only a User can complete and submit these.

Cases requiring a Further Treatment report to be completed will be located within the 'In Treatment' icon on the Dashboard.

A prepopulated report template will now be available for completion. The Further Treatment report should be completed in the same way as a Treatment Report by following the steps 1 – 4 in the 'Completing a Treatment report' section.

10. Cases on Hold / Cases off Hold

Cases on Hold

3d may place a case on hold at any point of the case lifecycle.

Cases that have been placed on hold will be displayed in the 'On Hold icon on the Dashboard. The Business Administrator will be able to view all cases on hold whilst the User will only be able to view their cases.

By selecting the 'On Hold' Icon, the screen below is displayed:

On Hold

Sub Case Reference No.	First Name	Surname	Contact Details	Date Of Birth	Date of Accident	Assess Only	Max Treatment Authorised	Therapist	Appointment
20002211/4	Chris	Ingram	6 Napier Drive, Bolton, BL6 6FZ. Home: 515454	10/12/1989	01/01/2014	<input type="checkbox"/>	2	Miss Andrea Heath	24/07/2015 00:00
20004368/2	Point Three	4.3	Premex House Futura Park, Horwich, BOLTON, BL6 6SX. Mobile: 784512	10/10/1950	01/01/2016	<input type="checkbox"/>	4	Pappa Kilo	03/04/2017 12:00
20004511/5	Jessica	Dearden	53 Brazley Avenue, Horwich, BOLTON, BL6 6LF. Home: 784512	04/01/1984	05/01/2016	<input type="checkbox"/>	8		15/02/2016 18:02
20005069/4	Jessica	Roberts	Premex House Futura Park, Horwich, BOLTON, BL6 6SX. Home: 01204478350	10/12/1989	15/02/2016	<input type="checkbox"/>	6	Lianne Stott	07/03/2017 13:00
20003343/1	Karen	PIGO	Premex House Futura Park, Horwich, BOLTON, BL6 6SX. Mobile: 02558858585	06/12/1966	02/11/2015	<input type="checkbox"/>	8	Karen.Harvey1	

No actions are available when a case has been placed on hold.

Cases off Hold

When 3d take the case off hold, the case will no longer be displayed within the 'On Hold' icon. The case will then be displayed in the last status icon it was at before the case was placed on hold.

If the case is at discharge status, the User can complete a report.

11. Pending Cancellation

3d may cancel a case at any point of the case lifecycle.

The case will be displayed in the 'Pending Cancellation' icon on the Dashboard. The Business Administrator will be able to view all cases on hold whilst the User will only be able to view their cases.

By selecting the 'Pending Cancellation' Icon, the screen below is displayed:

Pending Cancellation

Sub Case Reference No.	First Name	Surname	Contact Details	Date Of Birth	Date of Accident	Assess Only	Max Treatment Authorised	Therapist	Appointment
20004387/4	Chris	Ingram	Premex House Futura Park, Horwich, BOLTON, BL6 6SX. Home: 12354	01/04/1992	01/10/2016	<input checked="" type="checkbox"/>	0	Pappa Kilo	28/11/2016 00:00
20002492/4	Ellie	Golding	1 Napier Drive, Horwich, BOLTON, BL6 6FZ. Home: 04565	10/12/1984	30/07/2015	<input type="checkbox"/>	8	Pappa Kilo	14/08/2015 12:48

Cases can be re-allocated to an alternative user.

Report can be completed and submitted.

12. Re-Allocate Case

If a case needs re-allocating to an alternative User for any reason, only the Business Administrator can re-allocate the case.

This will remove the claimant from the original Users Dashboard and the case will be displayed in the re-allocated Users Dashboard. Cases may be re-allocated at any point in the case lifecycle.

Select the re-allocate hyperlink from within one of the following screens:

- Allocate & Appoint
- Awaiting Assessment
- In Treatment
- Pending Cancellation

Example below:

Sub Case Reference No.	First Name	Surname	Contact Details	Date Of Birth	Date of Accident	Assess Only	Max Treatment Authorised	Therapist	Appointment	
20004511/6	Dave	Smith	Aspinall House Aspinall Close, Horwich, BOLTON, BL6 6QQ. Home: 01204 000 000	01/04/1980	01/01/2017	<input type="checkbox"/>	4	Pappa Kilo	12/12/2017 12:00	Report Re-Allocate Re-Book

Once selected, the Re-Allocate therapist screen will appear:

Re-Allocate Therapist

Sub Case Reference No:
20006387/4

Name:
Chris Ingram

Address:
Premex House Futura Park Horwich BOLTON BL6 6SX

Contact Details:
Home: 12354,

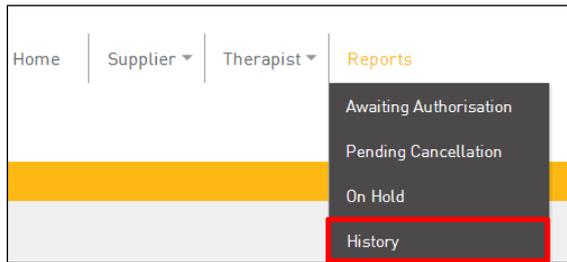
Therapist:

Select the user the case is to be re-allocated to and select confirm to action

13. History

All cases that are closed are displayed in the 'History' section of Unity. The Business Administrator will be able to view all User cases in History whilst the User will only be able to view their own cases.

History is accessed via the Reports menu on the Dashboard:



History Screen will then be displayed:

The name of the User treating the claimant is displayed. This can only be viewed by the Business Administrator

Therapist	Sub Case Reference No.	First Name	Surname	Date of Birth	Date of Accident	Assessment Report	Treatment Report
Karen.Harvey1	20004363/1		dingle	01/01/2001	12/12/2015	Assess	Treat
Lianne Stott	20004715/1		xcxcxc	01/01/1950	02/02/2016	Assess	Treat
Lianne Stott	20006534/2	1	3	02/01/1993	02/01/2017	Assess	Treat
Pappa Kilo	20006521/6	A	Test	02/11/2009	12/06/2014	Assess	Treat
Lianne Stott	20002303/2	Adam	Sandler	08/08/1950	09/02/2015	Assess	Treat
Karen.Harvey1	20005532/1	AFP	AFP	01/08/1968	01/04/2016	Assess	Treat
Karen.Harvey1	20005533/1	Afp plus	Afp plus	01/08/1966	01/04/2016	Assess	Treat
Lianne Stott	20002196/5	Alison	Heath	10/12/1989	01/01/2015	Assess	Treat
Miss Andrea Heath	20002196/6	Alison	Heath	10/12/1989	01/01/2015	Assess	Treat
Pappa Kilo	20002748/1	Andrew	Rohden	13/10/1983	20/10/2015	Assess	Treat

Hyperlinks are visible for all completed assessment and treatment reports. If there is no hyperlink this means a report was not completed and the case was cancelled.

14. FAQ's

Q	What if a venue is not available for selection?
A	Please contact 3d Unity Support at Unity.support@3drehab.co.uk who will add the venue to your profile.

Q	I cannot see a User in the dropdown list whilst allocating a case.
A	Refer to page 7 of this guide. Ensure that you have allocated the User to all venues applicable to them.

Q	How do I change a User's email address?
A	Refer to page 6 of this guide. In the Add Therapist screen you can amend name, HCPC number, email address, signature and available venues

Q	What happens if one of my Users locks themselves out of Unity by inputting their password incorrectly?
A	The Business Administrator will receive an email link to reset the Users password.

Q	What if I forget my username or password?
A	Select 'Need help with login?' on the Log in page and the system will prompt you throughout the reset process.

Q	I have added a User to a venue but Unity is not allowing me to allocate referrals to the User.
A	The User may not have completed the registration process. Once they have done this, you will be able to allocate referrals to them.

Q	I am receiving report templates with the 3d email referral. Do I need to complete the report on Unity and email a copy as well?
A	No, you only need to complete the report on Unity.
Q	What if a User submits a report in error?
A	You must inform 3d immediately. The User will not be able to edit the submitted report. Ed will forward a template for the User to complete.
Q	Why am I unable to save or submit a report?
A	Check that you are logged in as a User. A Business Administrator is not able to save or submit reports.
Q	What if a case is on hold because we were unable to establish contact with the claimant and the claimant has contacted us to book an appointment?
A	Contact 3d and we will release from hold or confirm the next action.
Q	The claimant has advised that their information is incorrect for example date of birth, address etc?
A	Contact 3d immediately. 3d will amend the information and the report template will update in Unity.