

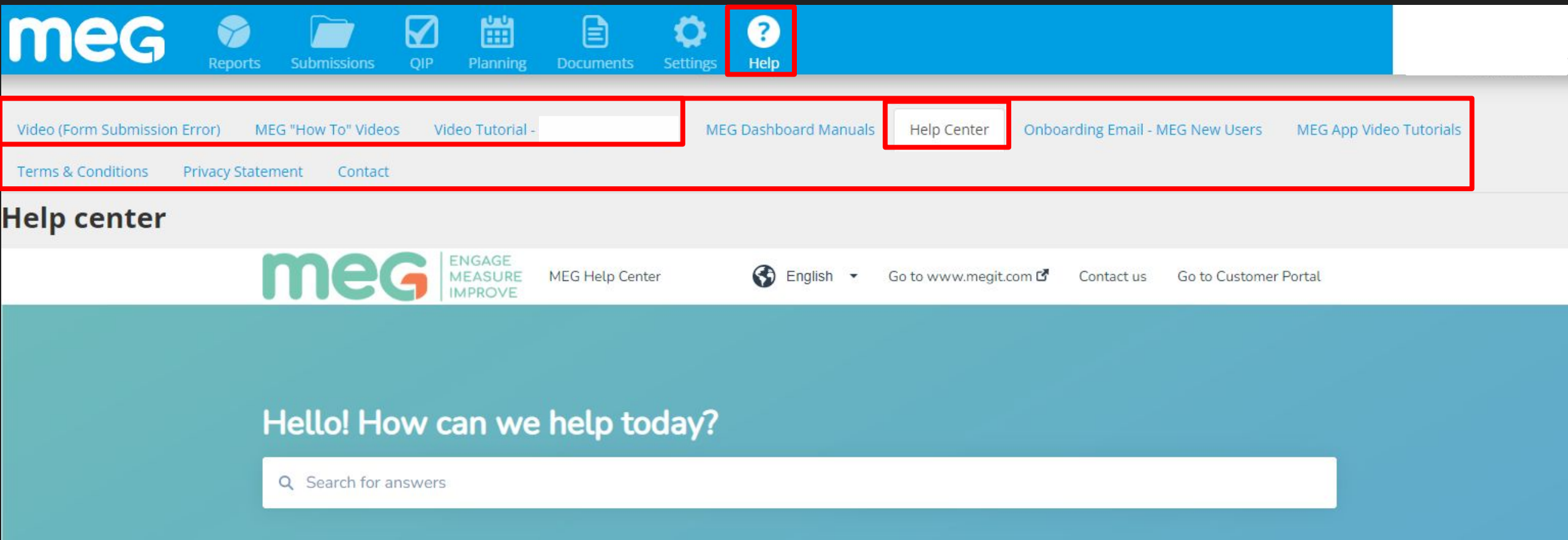


Settings & Help



The “Help” tab is accessible by all MEG users, including juniors. There are resource videos available to empower and guide users through using MEG as well as troubleshooting tips. This should be accessed as a first port of call.

The MEG “Help center” is where you can search for answers related to the App and Dashboards



Forms

Users

Teams

Departments

Wards

Room Types

Common Issues

Public Dashboards

Information

Report Rules

Email Schedules

Email Context





Timeline Events

Form	Type	Status	Level	Institution	Manage
[2022]	Audit	-	Institution		Questions Common Issues Targets
[2022]	Audit	-	Institution		Questions Common Issues Targets



Administrators can edit form questions by clicking “Questions” alongside the appropriate form (you will see your assigned Institution’s forms)





A blue button with a double-headed vertical arrow icon and the text "Change Order".A blue button with a plus sign icon and the text "Add Question".

Question	Widget	Required	Choices	Actions
General Instructions	Heading	False		 Edit  Remove
Section 1: Access to the Ward	Heading	False		 Edit  Remove
Was the unit locked ?	Single choice (radio)	True	Yes (100.0%) No (0.0%)	 Edit  Remove

Here you can:

Change order of the questions: click on “change order” and drag and drop to re-order. Click “Save order” to reflect changes

A green button with a floppy disk icon and the text "Save Order".A blue button with a plus sign icon and the text "Add Question".

Order	Question	Widget	Required	Choices	Actions
	General Instructions	Heading	False		 Edit  Remove
	Section 1: Access to the Ward	Heading	False		 Edit  Remove
	Was the unit locked ?	Single choice (radio)	True	Yes (100.0%) No (0.0%)	 Edit  Remove

[↕ Change Order](#)[+ Add Question](#)

Question	Widget	Required	Choices	Actions
General Instructions	Heading	False		✎ Edit 🗑 Remove
Section 1: Access to the Ward	Heading	False		✎ Edit 🗑 Remove
Was the unit locked ?	Single choice (radio)	True	Yes (100.0%) No (0.0%)	✎ Edit 🗑 Remove

Under actions:

“Remove” question will delete the question

“Edit” allows you to edit the question (see next slide for image)

Label [en] Was the unit locked ?
Field label displayed to the user

Widget Single choice (radio)

Help text [en] **B U A -**

Additional text displayed under the question

Required
If ticked this question must be answered on the form. Note: If the question is nested this MUST be left unticked and only be marked as required within the conditions of the parent question

Choices [en]

Value	Label	Remove
Yes	Yes	
No	No	

Change Order Add Choice Bulk Add

Choices available for this question. The value must be unique and constant, while the label can be updated at any point and translated to other languages.

Image No file chosen
Image to be displayed under the question to provide instructions or context.

Compliance calculation use

Compliance weight 1.0
Weight of this question in relation to compliance calculation. Must be greater than zero.

Compliant value Yes
Expected value for the observation to be considered compliant

Ignored value Ignored value
If field has this value, compliance calculation will be skipped for this field

Editable after submission
Whether answer can be changed by user after submission

- Label (question wording – shorter wording is better for reports)
- Widget: type of question
- Help text (additional text to accompany question)
- Required (whether mandatory or not)
- Choices (answer options) you can change wording / change order/ remove/ add)
- Image (add / remove accompanying image)
- Compliance calculation (if required)
- Compliance weight of question
- Compliant value (answer = compliant)
- Ignored value (won't affect compliance percentage)
- Editable after submission (tick if applicable)

[↕ Change Order](#)[+ Add Question](#)

Question	Widget	Required	Choices	Actions
General Instructions	Heading	False		✎ Edit 🗑 Remove
Section 1: Access to the Ward	Heading	False		✎ Edit 🗑 Remove
Was the unit locked ?	Single choice (radio)	True	Yes (100.0%) No (0.0%)	✎ Edit 🗑 Remove

Add Question

Label

Field label displayed to the user

Widget

Required

If ticked this question must be answered on the form. Note: If the question is nested this MUST be left unticked and only be marked as required within the conditions of the parent question

Editable after submission

Whether answer can be changed by user after submission

[✕ Cancel](#)[✔ Save](#)

“Add question” allows you to add a question to the form
Label = question wording
Widget = type

Name

Institution

Wards

Forms

eGuides

User

Teams

Permissions

Active

“Users” will bring a list of active users within your Site, here is where you can manage their MEG account. If an account has been made “inactive” eg if someone went on an extended period of leave they will appear in the “inactive list”, you can change their accounts from there.

Use the search bar to filter the list of users

Name

Institution

Wards

Forms

eGuides

User

Teams

Permissions

Active

MEGtest.lead

All wards

[2022]

[2022]

-

Lead

True

MEGtest.junior

All wards

[2022]

[2022]

-

-

True

Users / Test Lead

Account Form permissions eGuide access

Username * MEGtest.lead

First name Test

Last name Lead

Email address

Active

Password Pasoword

Confirm password Confirm password

Phone number Phone number

Receive voice alerts

Receive sms alerts

Staff ID Staff ID

Available forms 19 selected

User Teams None selected

Wards All (default)

Language -

Time zone

Allow patient data access

App access

Send onboarding e-mail

Permission Groups (hide)

	Name	Description	Permissions
<input checked="" type="checkbox"/>	Lead	User with read-only access to submissions. View only access to calendar. QIP - can access all QIP issues but has limited access and can't edit protected questions.	<input type="button" value="View"/>
<input type="checkbox"/>	Issue Handler	Only accesses QIP items assigned to themselves on the dashboard, does not access data outside of QIP items.	<input type="button" value="View"/>
<input type="checkbox"/>	Reviewer Basic	Lead Permissions + Edit ability to all editable questions	<input type="button" value="View"/>
<input type="checkbox"/>	Reviewer Full	Reviewer Basic + Can edit protected QIP Questions and edit protected observation questions (can see confidential questions and	<input type="button" value="View"/>

Login Logs

Click on the user account to view and edit accordingly

Fields you can edit if applicable are:

- First name, last name, email address
- Active / Inactive
- Phone number
- Receive voice / sms alerts
- Staff ID
- Available forms (select/ deselect using tick box)
- User teams (select/ deselect using tick box)
- Wards/Sites (select/ deselect using tick box)
- Language
- Time zone
- Allow patient data access (**must** be ticked for forms that contain patient data e.g. Hospital ID)
- App access (must be ticked to use MEG app)
- **Send onboarding email (select if User needs a password reset)**
- Permission groups (select/ deselect using tick box)

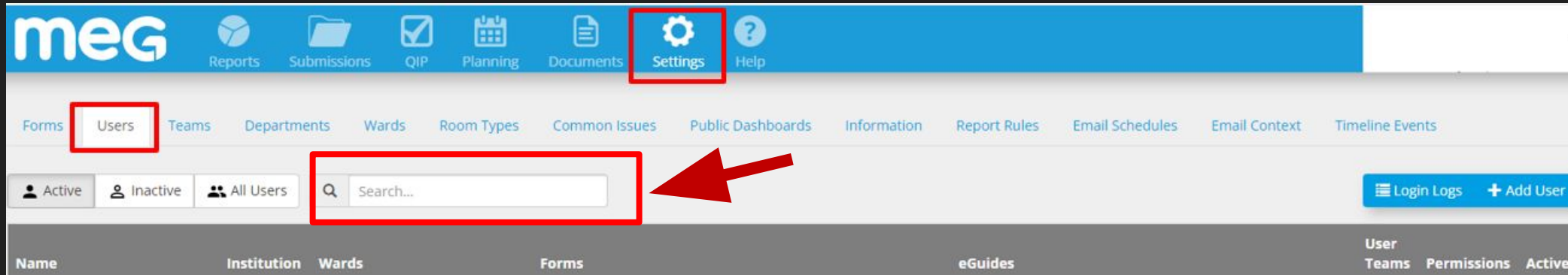
Always remember to click Save!

Users who's accounts have been updated should log out and log back in to see changes reflected

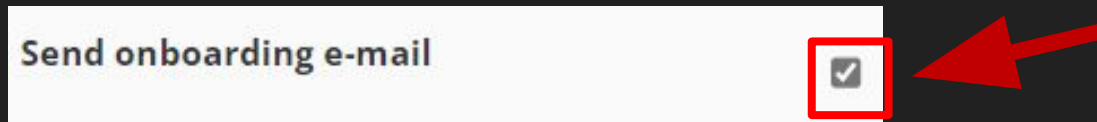
Always remember to click Save!

As a Site Administrator, this is how you can send a **password reset** if a User needs it

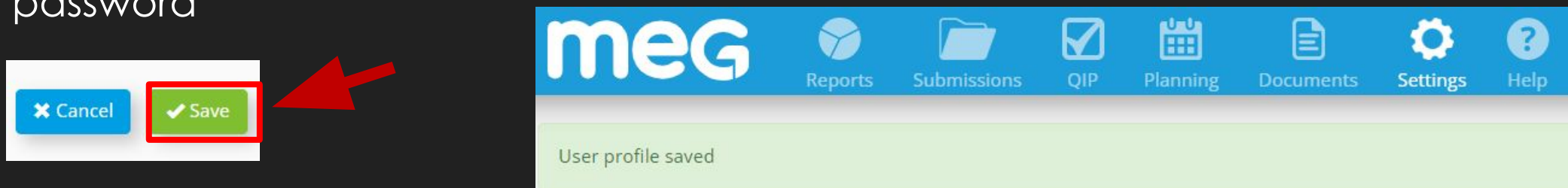
1. Click **Settings**
2. Click **Users**
3. Search for the MEG user profile, click to open



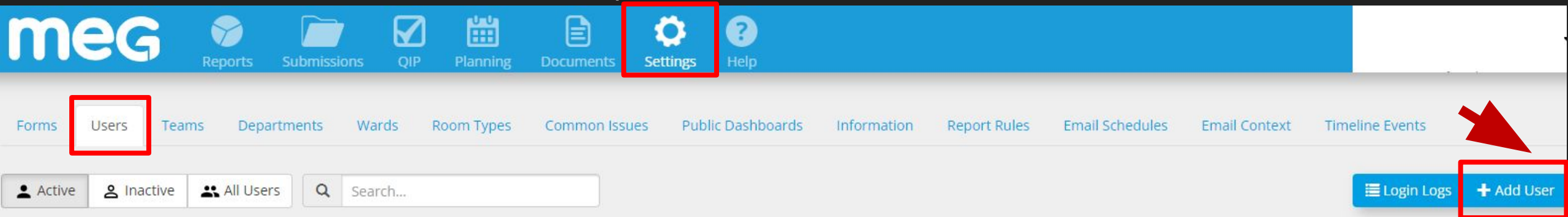
Scroll down until you see “Send onboarding email” and select the tick box




Click “Save”, the screen will refresh and have a message stating “User profile saved”. The User will receive an email (sent to the email address on their profile) with a link to follow to set their password



As a Site Administrator, this is how you can add a **new user**



1. Click **Settings**
2. Click **Users**
3. Click **+Add User**
4. Click **Save** 

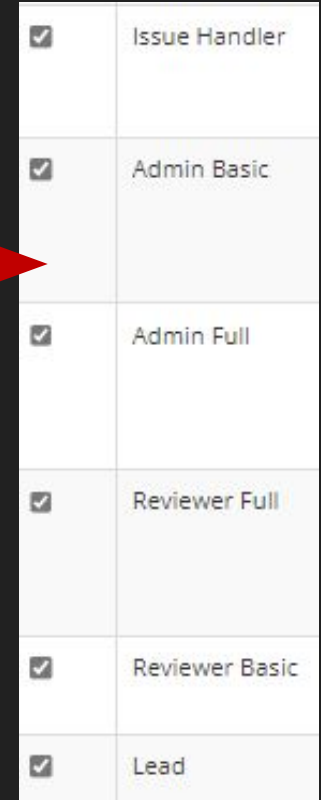
Add applicable user particulars that were referred to in Slide 9 – you must enter the following

- First name, last name, email address
- Available forms (select using tick box)
- Wards/Sites (select using tick box) if left untouched a user has access to all
- Allow patient data access (**must** be ticked for forms containing patient data e.g. URN/ DOB)
- App access (**must** be ticked to use MEG app)
- Send onboarding email (**must** be ticked for the user to set their password)

Permission groups
(see image)

Select using tick box.

Refer to the table on the next slide for further detail



<input checked="" type="checkbox"/>	Issue Handler
<input checked="" type="checkbox"/>	Admin Basic
<input checked="" type="checkbox"/>	Admin Full
<input checked="" type="checkbox"/>	Reviewer Full
<input checked="" type="checkbox"/>	Reviewer Basic
<input checked="" type="checkbox"/>	Lead

Matrix of permissions and what the user can access

	Admin Full	Admin Basic	Reviewer Full	Reviewer Basic	Lead	Junior/No Permission	Issue Handler
Manage Departments and Wards	Y	N	N	N	N	N	N
Manage Form Config and Questions	Y	Y	N	N	N	N	N
Edit data submitted to forms	Y	N	Y	Y	N	N	N
Edit restricted data on submitted forms	Y	N	Y	N	N	N	N
Edit confidential data on submitted forms	Y	N	Y	N	N	N	N
Manage Accounts	Y	N	N	N	N	N	N
QIP Access	Y	N	Y	Y	Y	N	Y (own issues only)
Edit Restricted QIP fields	Y	N	Y	N	N	N	N
All access to Planning (Calendar and Targets)	Y	Y	N	N	N	N	N
Unpublish Submissions	Y	N	N	N	N	N	N
Access to all settings i.e Report Rules, Email context wording, Form information panels	Y	N	N	N	N	N	N
Submit Data (can be disabled on a per user basis with our "app access" setting)	Y	Y	Y	Y	Y	Y	Y
Export raw data	Y	N	N	N	N	N	N

Permissions within MEG	What a user can actually do with these permissions
Manage Departments and Wards	Can add, rename, remove departments and wards
Manage Form Config and Questions	<p>Can rename forms</p> <p>Set which wards a form has access to</p> <p>Change the rag rating of audit forms, i.e maybe one form needs to reach 95% to achieve compliance</p> <p>+ many more form config options</p> <p>Change the order of questions in a form</p> <p>Change the wording of a question</p> <p>Add or edit the helptext in a question</p> <p>Enable/Disable if a question is mandatory</p> <p>+ many more question config options</p>
Manage Accounts	<p>Add and Disable users</p> <p>Set which forms and wards a user has access to</p> <p>Set which teams a user is part of</p> <p>Set which permission groups a user has access to</p>
Edit data submitted to forms	If a permission group has this permission the users will only be able to edit editable fields
Edit restricted data on submitted forms	If a permission group has this permission the users will be able to edit all fields, even if they are labelled as not editable
Edit confidential data on submitted forms	see
Read only data to submitted forms	If a permission group has this permission the users will only be able see data that has been submitted
QIP Access	Can view and edit all QIP issues for the forms the user has access to
Edit Restricted QIP fields	As with form fields, QIP fields can be restricted fields where only certain users can update these fields
All access to Planning (Calendar and Targets)	<p>A permission group with access to the planning tab can schedule audits for any form they have access to</p> <p>Schedules can be set for any other user who has access to the form</p> <p>A user is limited to scheduling audits to the wards they have access to</p> <p>Targets can also be set up by users with access to this permission group. A target in MEG is a way to set how many forms you want to submit over a specific time period, this is different to scheduling as there is no specific date set to complete the forms</p>
View only access to Calendar	These users can see calendar entries but not edit or add any additional schedules
Unpublish Submissions	A submission in MEG can be 1 audit or multiple audits combined depending on how your form is setup. With unpublish permissions as part of a permission group a user has access to, that user can remove a submission from MEG
Access to all settings i.e Report Rules, Email context wording, Form information panels	<p>Everything on our settings tab is there to help you optimize the experience in MEG. Report rules allow you to alert specific users about a form being submitted under certain conditions, i.e Alert user123 if an Incident form was filled out in Ward C. We can accomdate more advanced report rules like only send an email if the Incident form contained a "high risk" outcome, for now these advanced rules need to be set up by our support team.</p> <p>Email context wording allows you to add your own introduction note to certain system emails we send out, i.e Onboarding email.</p> <p>Form information panels are ways to provide additional information to your users about the form they are submitting, you can add an "information" section at the top of any form (i.e Link to video, PDF download, Image, Written instructions)</p>
Submit Data	Submitting data in MEG is done through our dedicated app or web app, this is the act of collecting data for a form
Export raw data	MEG provides the ability to export your raw data in the form of CSV, EXCEL, Powerpoint

Any **issue handler** must be a **MEG user**, you can set up an account which is **exclusively** for handling assigned issues if they don't need access to the app / dashboards e.g. a facility manager / cleaner may solely be following up on logged tasks in MEG.

Add user details in Settings, Select appropriate Form/s and Location/s, select “allow patient data” if they're assigned forms with patient details

PLUS deselect App access, select Issue Handler. They will only see assigned QIP issues (see next slide for an example of Issue Handler screen)

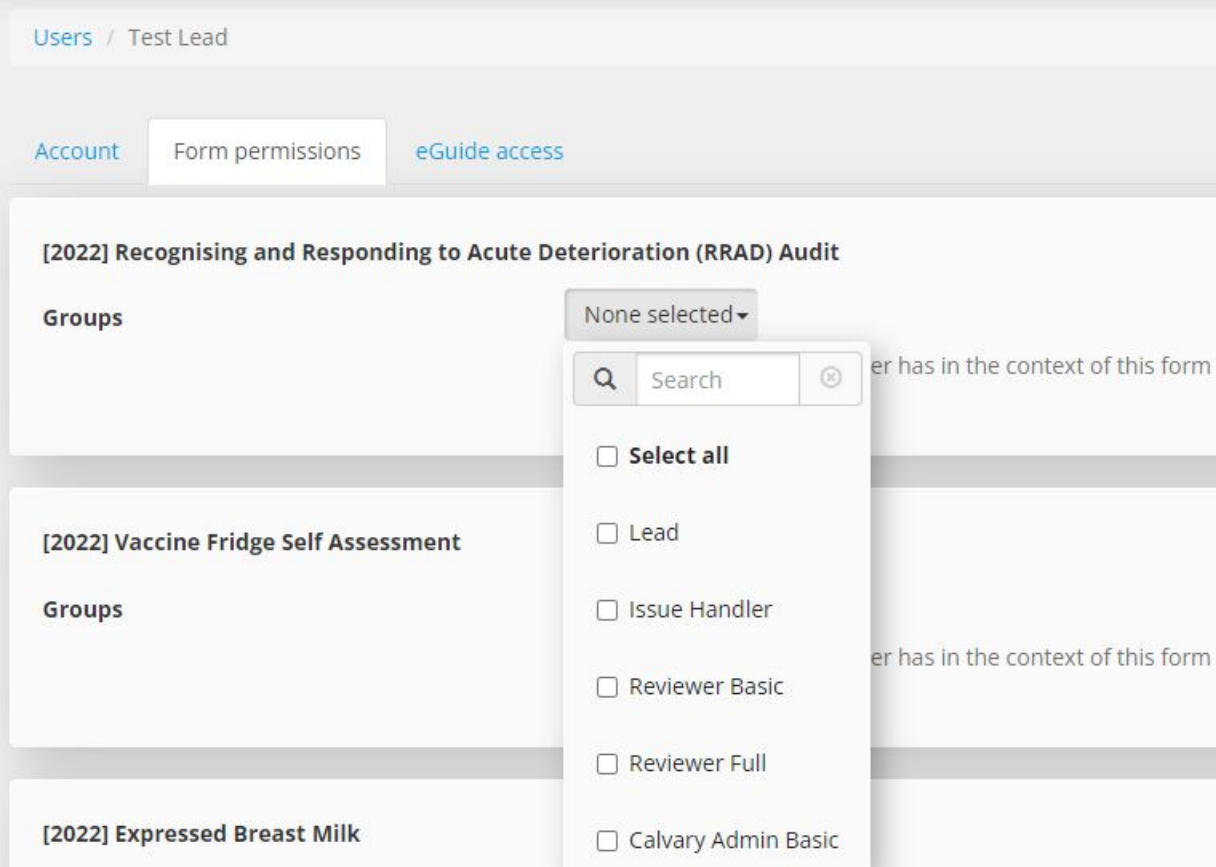
Allow patient data access

App access **Deselect app access**

Send onboarding e-mail

Permission Groups [\(hide\)](#)

	Name	Description	Permissions
<input type="checkbox"/>			<input type="button" value="View"/>
<input type="checkbox"/>			<input type="button" value="View"/>
<input type="checkbox"/>			<input type="button" value="View"/>
<input checked="" type="checkbox"/>	Issue Handler	Only accesses QIP items assigned to themselves on the dashboard, does not access data outside of QIP items.	<input type="button" value="View"/>



“Form permissions” allows you to assign the user specific permissions to the context of individual forms if required

E.g. a user may be only able to submit data for incident management and certain audits but have full access for review functionality in audit from their area of expertise

+ Add Team

Name	Institution	Level	Members
<i>Looks like there are no teams. Click "Add Team" to create one.</i>			

User teams / Add team

Name *

Institution *

Level *

Members

“Add team” allows you to add a Team.
 Name = team name e.g. IPC
 Institution = relevant institution
 Level = Institution or Group
 Members = Select the member/s to include in the Team from the drop down menu (you can utilise the name search bar).

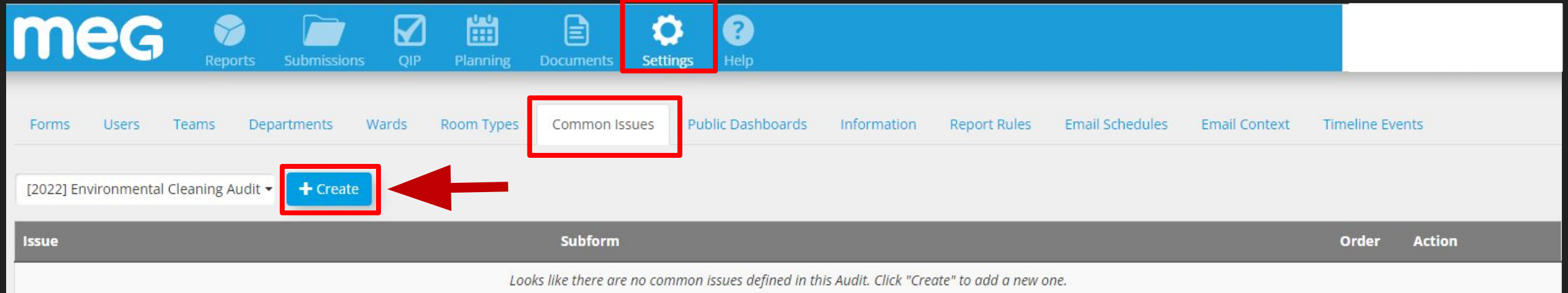
Click on save

Note: You can also assign users to team from the “Users” tab once the team/s are created in this section

Available forms

User Teams

Wards



- Common Issues can be added to forms for users to select from when they “add issue” when completing an audit form then they can include appropriate details, this saves Users manually entering a custom issue every time (Custom issue is always available as an option if different from common issues)
- For e.g. you may include in an environmental audit tool common issues such as “dust”, “peeling paint”, “curtains need changing”, “tape on trolley” etc.

Add common issue to [2022] Environmental Cleaning Audit

Comment *

Comment

Order *

1

Sub form

1. Press +Create
2. Enter the common issue in “comment”
3. Select specific sub form if required, or leave blank to appear throughout each section of the form
4. **Press Save**



If you require assistance please contact your local MEG Site Administrative Team

If you require further assistance please email MEG support: support@megit.com