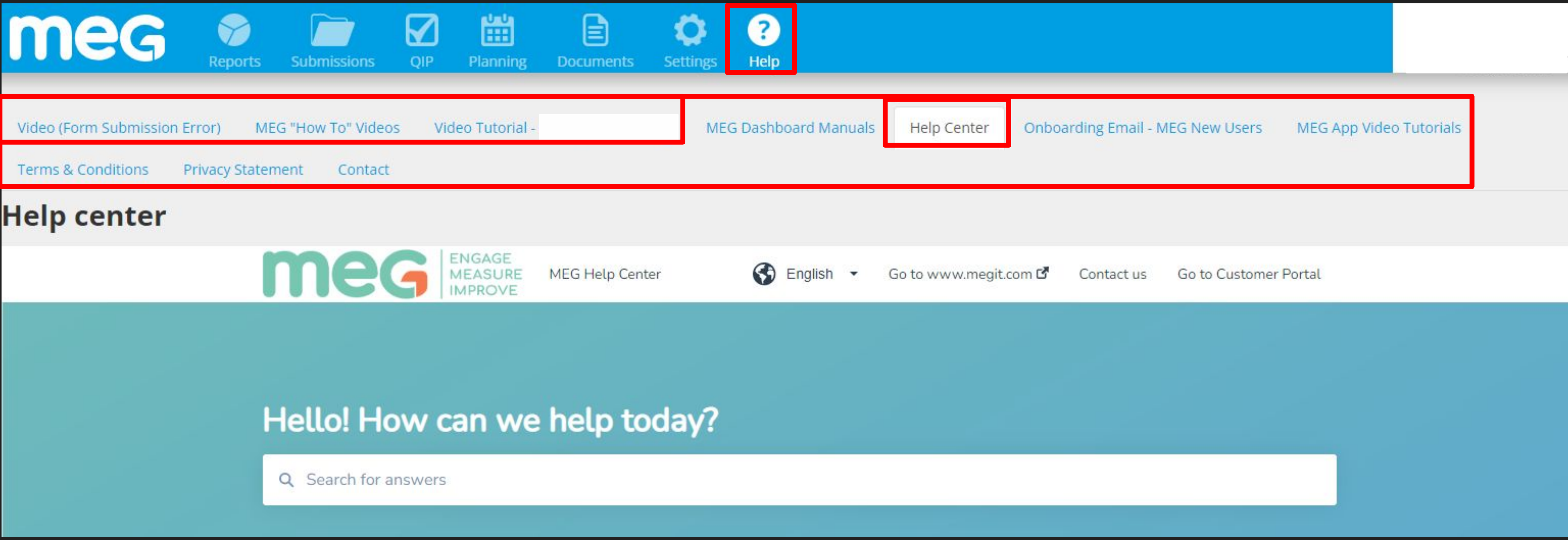
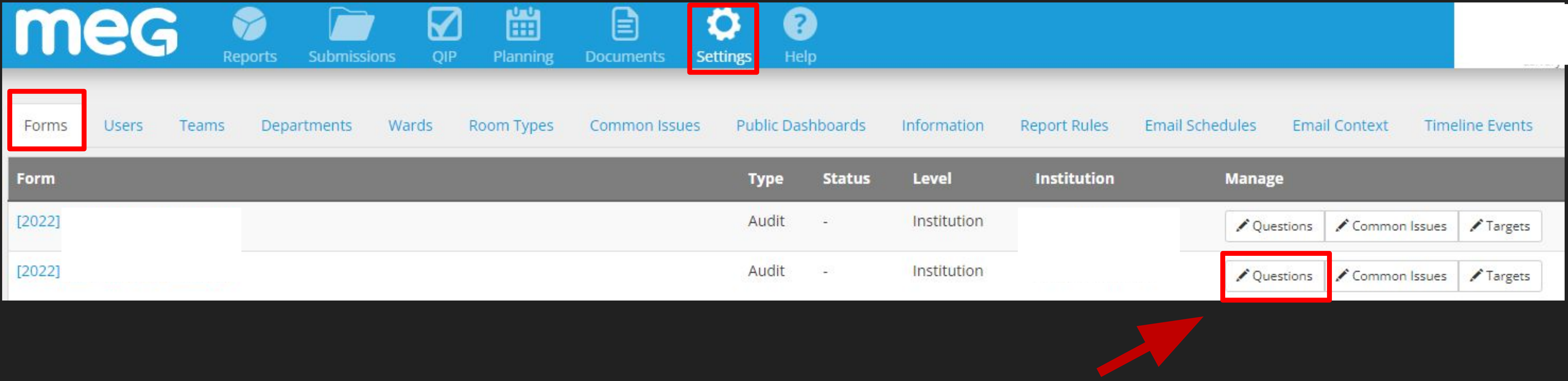
Settings & Help

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





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

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

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

Forms / [2022] / Questions

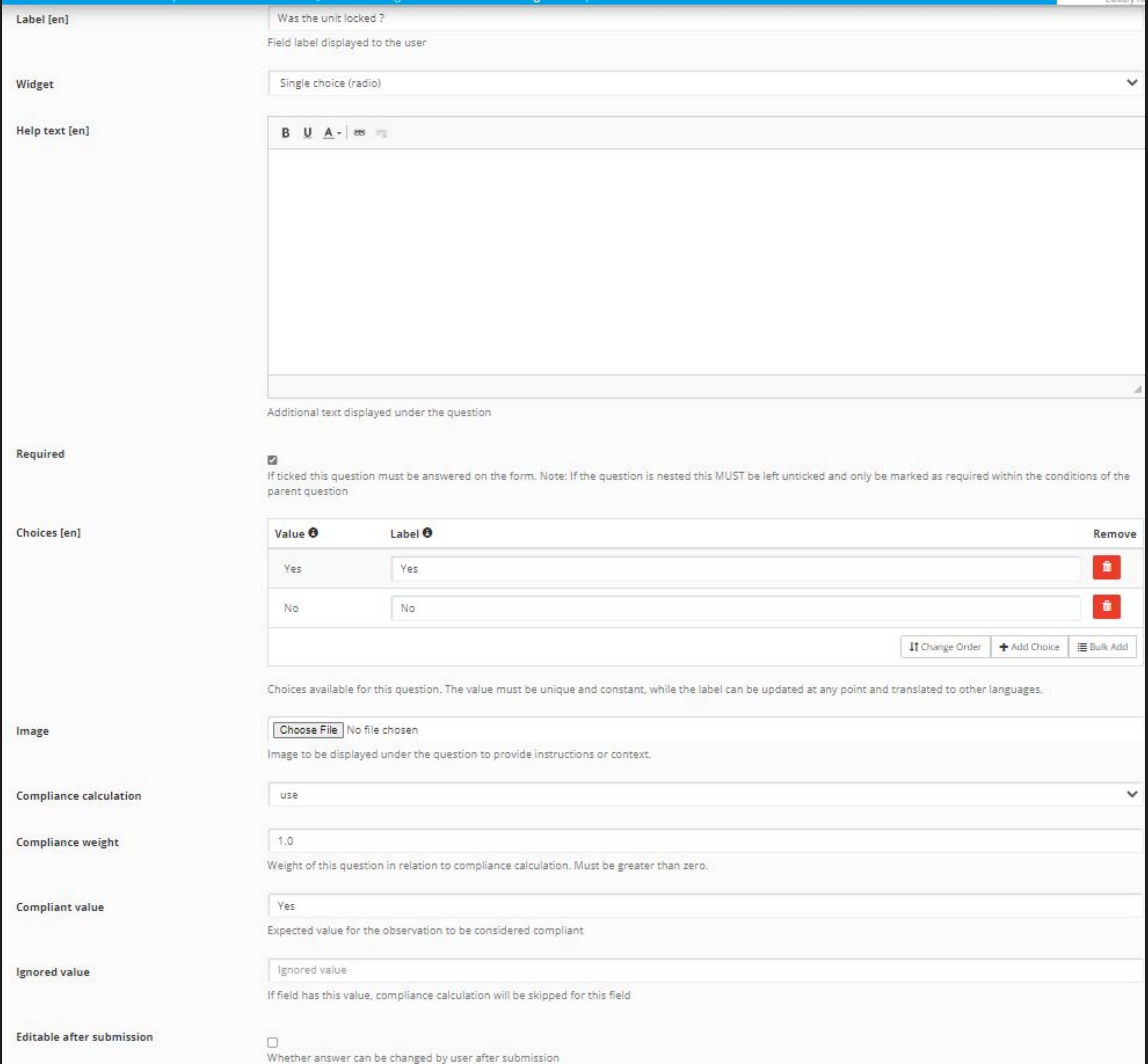
Change Order | Add Question

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 (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)

Forms / [2022] / Questions ▾

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

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

☐

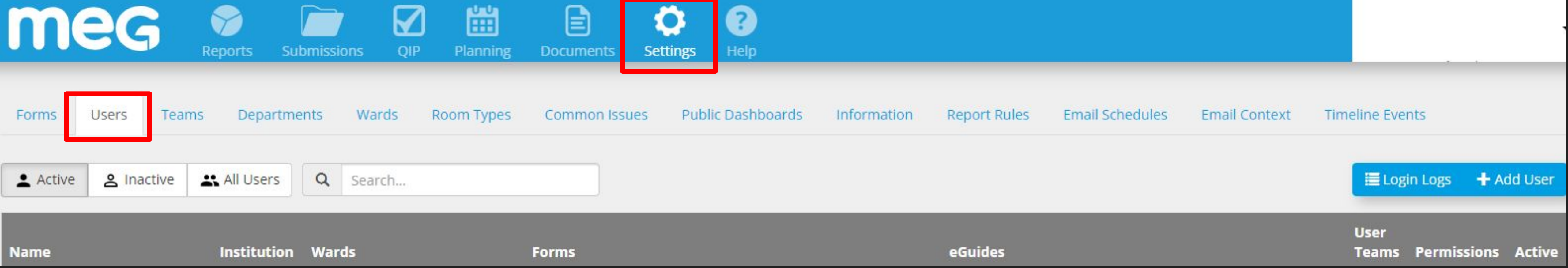
Whether answer can be changed by user after submission

Cancel | Save

"Add question" allows you to add a question to the form

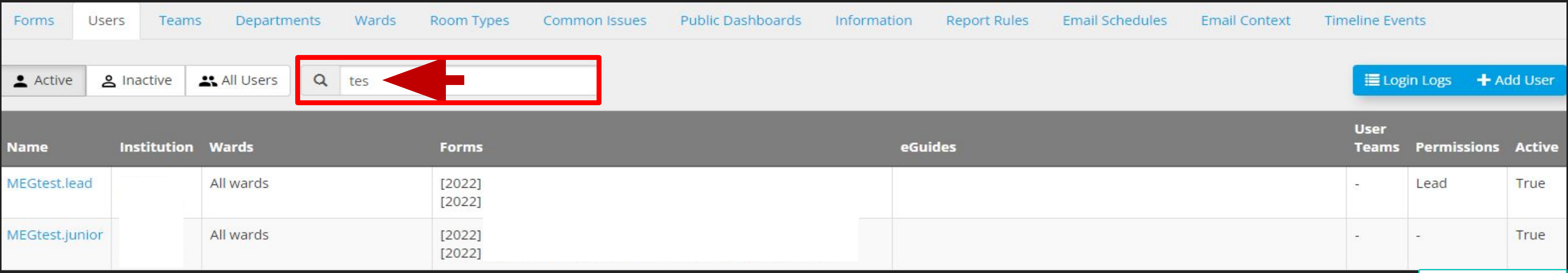
Label = question wording

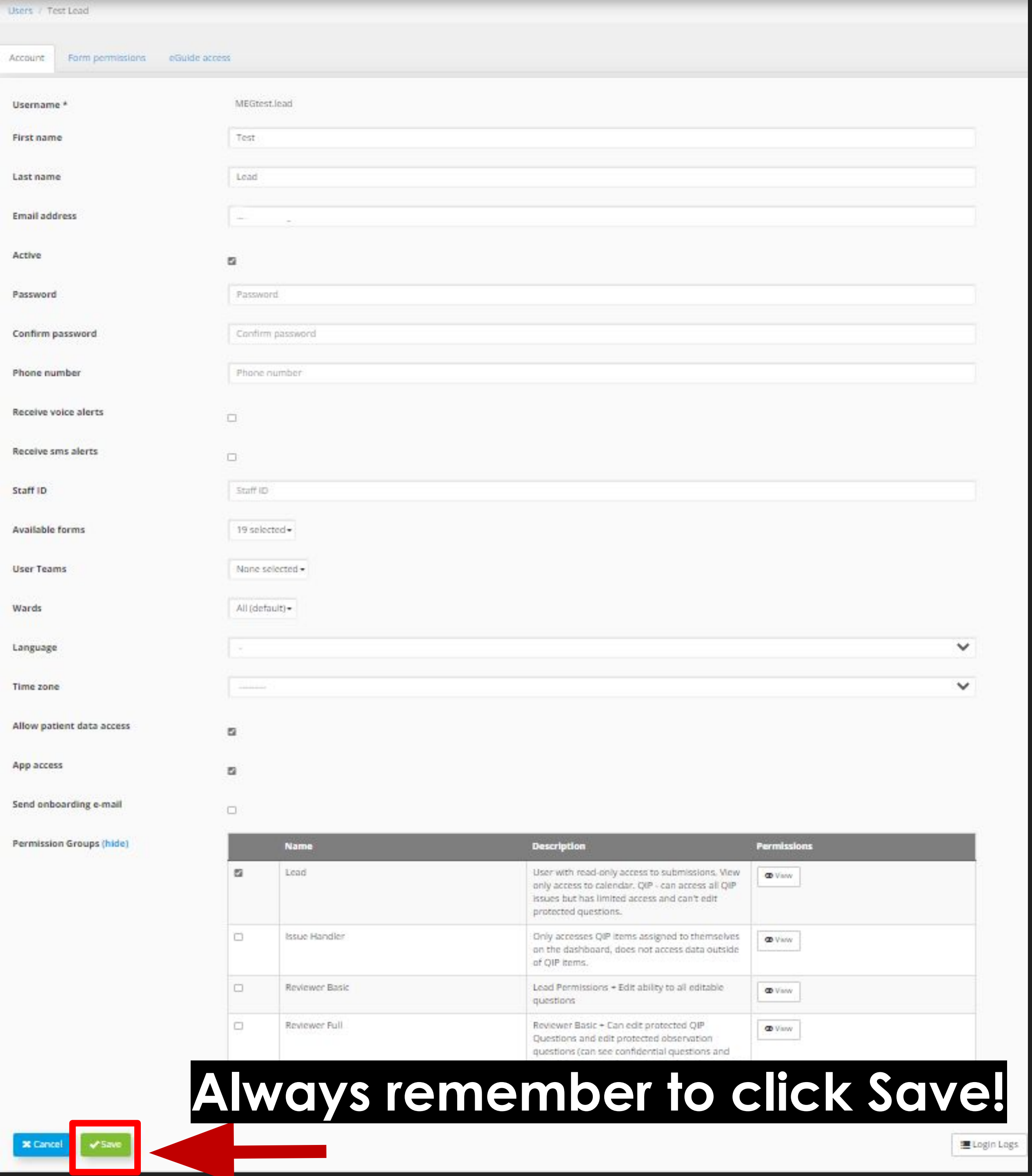
Widget = type



"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





Click on the user account to view and edit accordingly

Fields you can edit if applicable are:

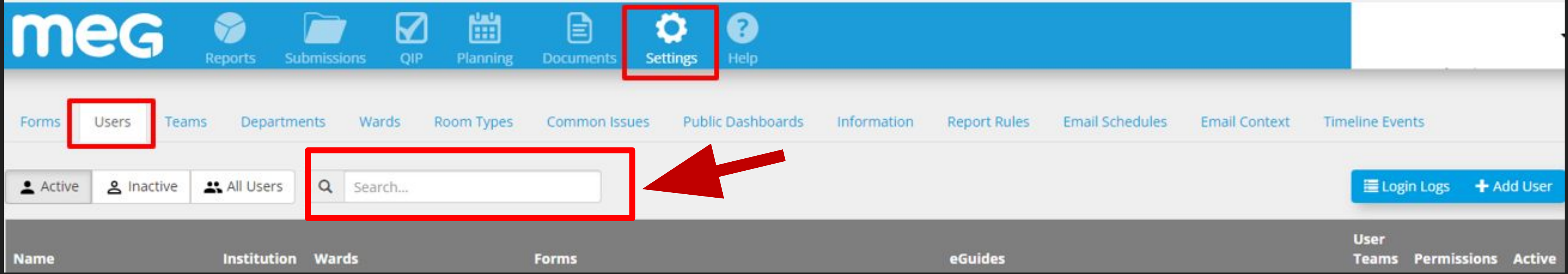
- First name, last name, email address
- Active / Inactive
- Phone number
- Receive voice / sms alerts
- Staff ID
- Available forms (select/ deselect using tick box)
- User teams (select/ deselect using tick box)
- Wards/Sites (select/ deselect using tick box)
- Language
- Time zone
- Allow patient data 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!

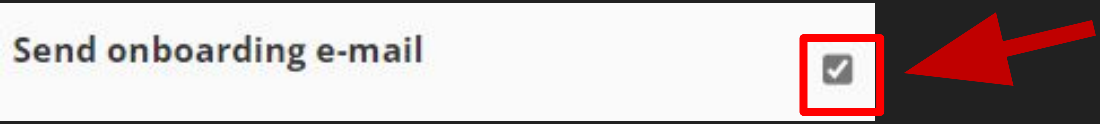
Users who's accounts have been updated should log out and log back in to see changes reflected

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

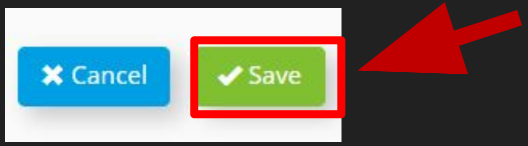
1. Click **Settings**
2. Click **Users**
3. Search for the MEG user profile, click to open

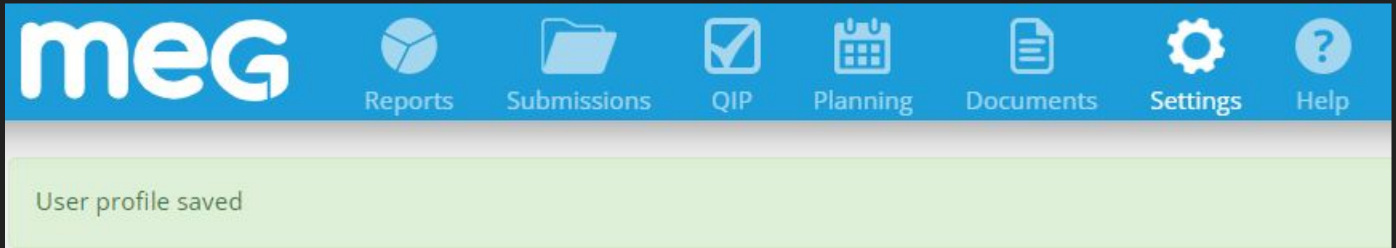


Scroll down until you see "Send onboarding email" and select the tick box

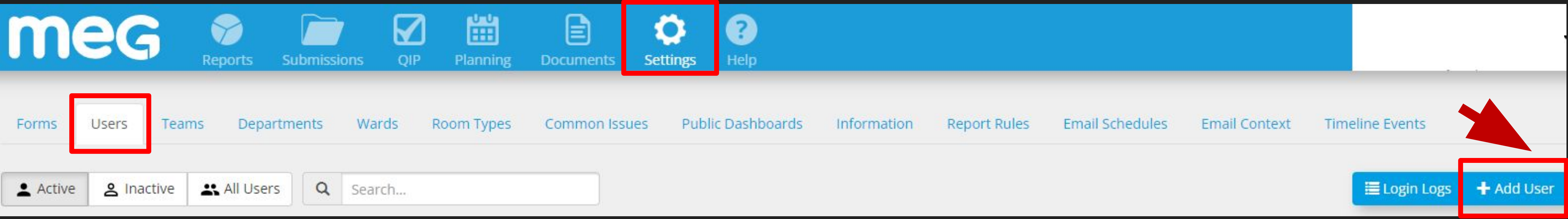


Click "Save", the screen will refresh and have a message stating "User profile saved". The User will receive an email (sent to the email address on their profile) with a link to follow to set their password





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** ✔Save

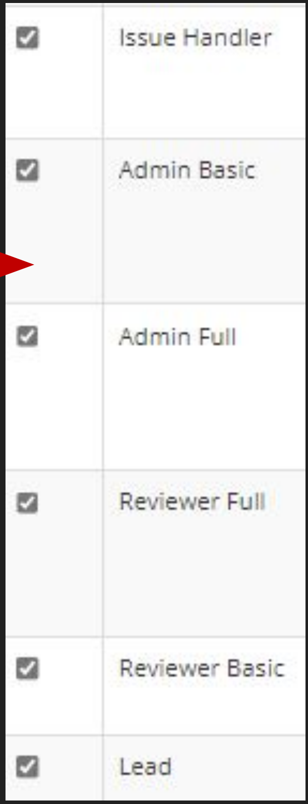
Add applicable user particulars that were referred to in Slide 9 – you must enter the following

- 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



Matrix of permissions and what the user can access

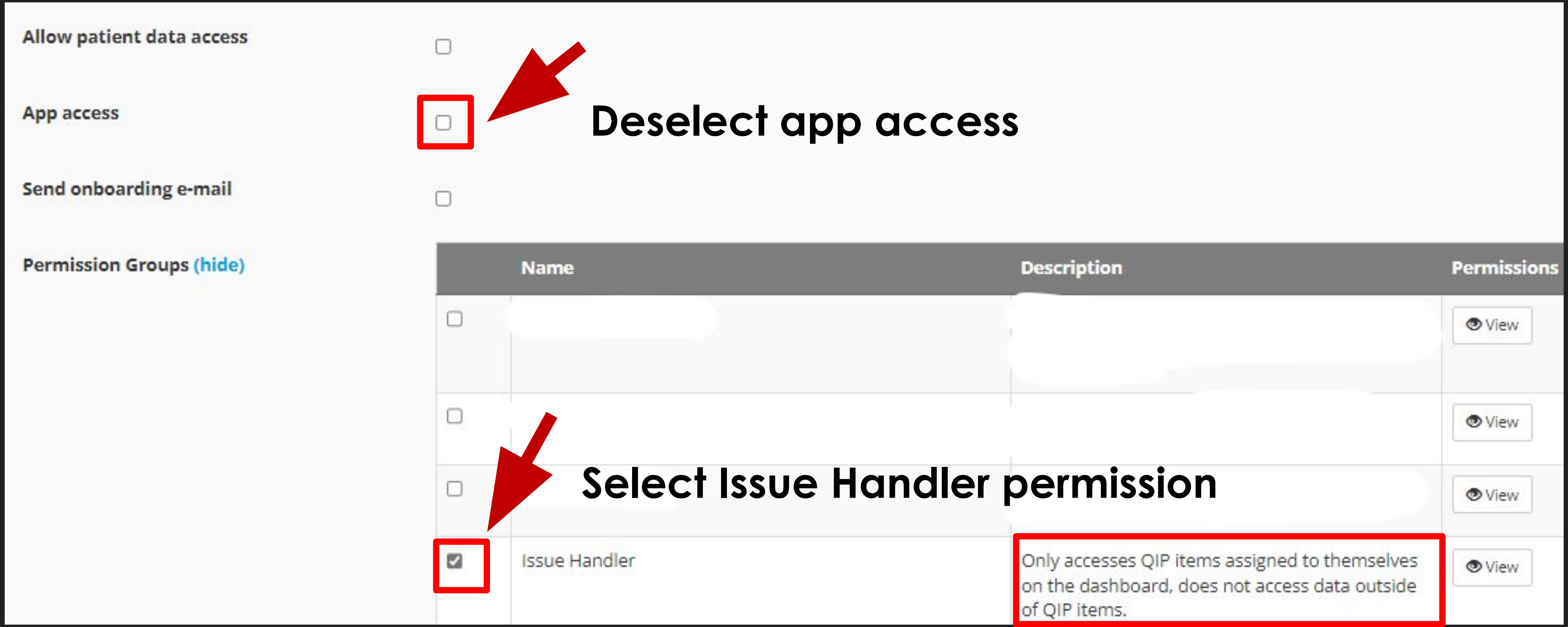
-	Admin Full	Admin Basic	Reviewer Full	Reviewer Basic	Lead	Junior/No Permission	Issue Handler
Manage Departments and Wards	Y	N	N	N	N	N	N
Manage Form Config and Questions	Y	Y	N	N	N	N	N
Edit data submitted to forms	Y	N	Y	Y	N	N	N
Edit restricted data on submitted forms	Y	N	Y	N	N	N	N
Edit confidential data 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

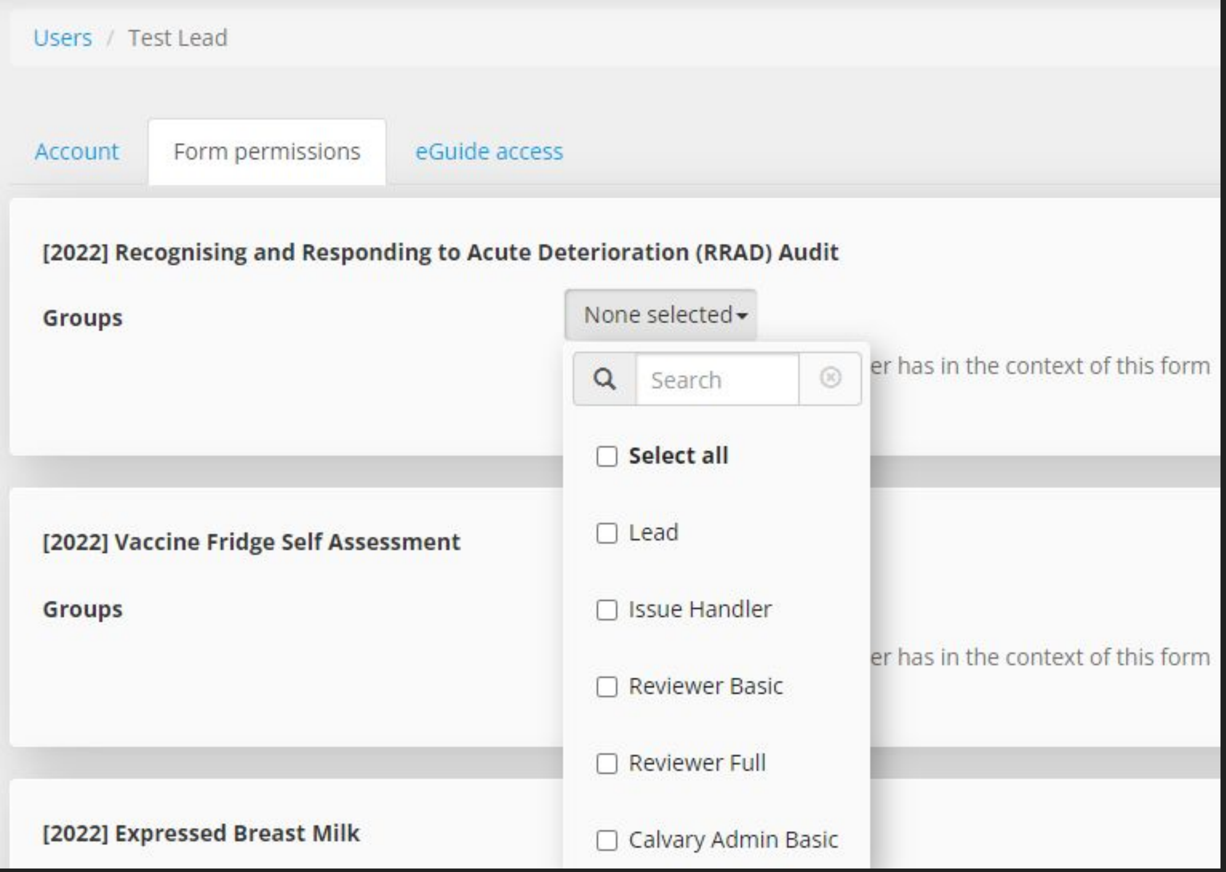
Permissions within MEG	What a user can actually do with these permissions
Manage Departments and Wards	Can add, rename, remove departments and wards
Manage Form Config and Questions	Can rename forms
	Set which wards a form has access to
	Change the rag rating of audit forms, i.e maybe one form needs to reach 95% to achieve compliance
	+ many more form config options
	Change the order of questions in a form
	Change the wording of a question
	Add or edit the helptext in a question
	Enable/Disable if a question is mandatory
	+ many more question config options
Manage Accounts	Add and Disable users
	Set which forms and wards a user has access to
	Set which teams a user is part of
	Set which permission groups a user has access to
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)	A permission group with access to the planning tab can schedule audits for any form they have access to
	Schedules can be set for any other user who has access to the form
	A user is limited to scheduling audits to the wards they have access to
	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
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	Everything on our settings tab is there to help you optimize the experience in MEG. Report rules allow you to alert specifc 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.
	Email context wording allows you to add your own introduction note to certain system emails we send out, i.e Onboarding email.
	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)
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 <u>must</u> 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

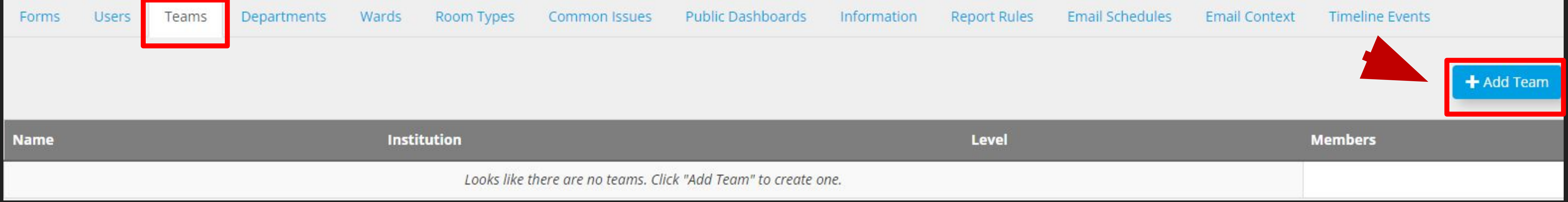
PLUS deselect App access, select Issue Handler. They will only see assigned QIP issues (see next slide for an example of Issue Handler screen)

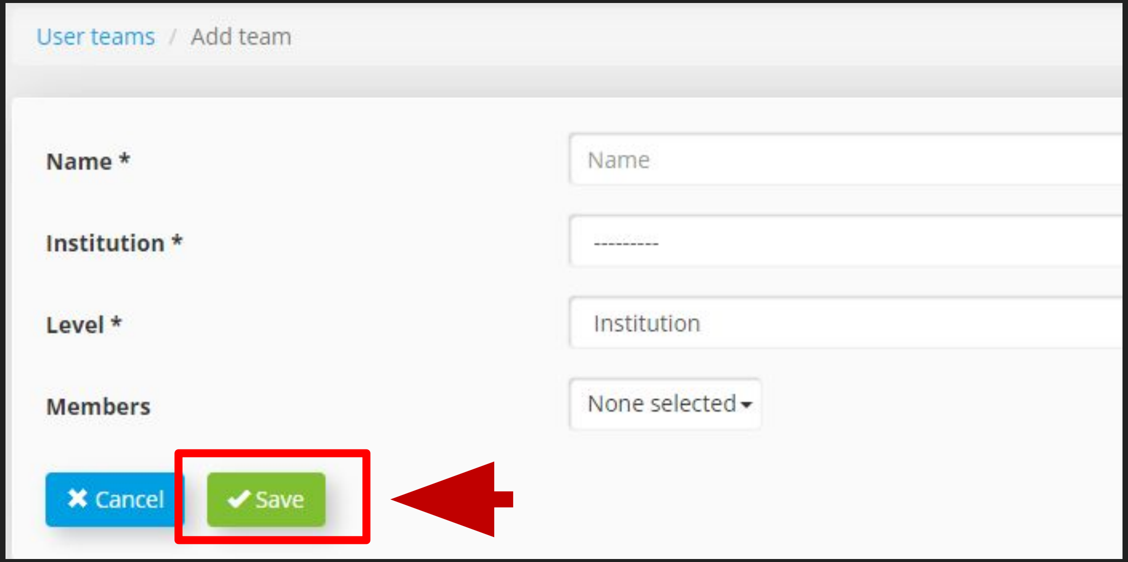




"Form permissions" allows you to assign the user specific permissions to the context of individual forms if required

- 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

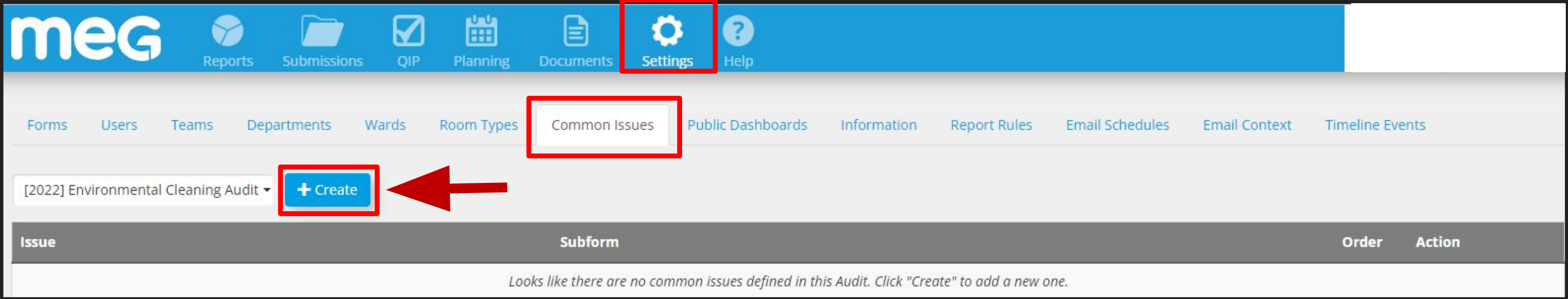




"Add team" allows you to add a Team.
Name = team name e.g. IPC
Institution = relevant institution
Level = Institution or Group
Members = Select the member/s to include in the Team from the drop down menu (you can utilise the name search bar).

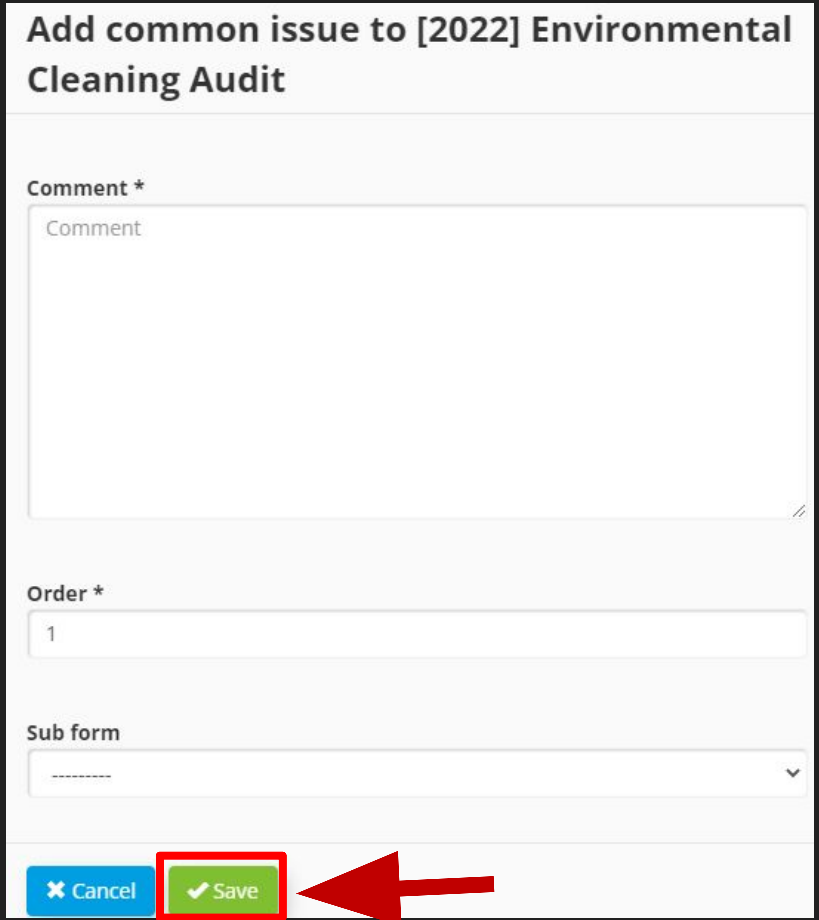
Click on save

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



- 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.



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