



Opto Health: Steaming Platform

Reception and Clinician User Overview Guide

*Empowering front-door teams to support safe,
effective patient access*



Lincolnshire Community and
Hospitals NHS Group





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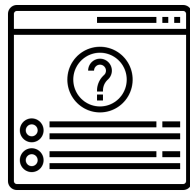
Reception and clinical guide to running Opto Health digital streaming product

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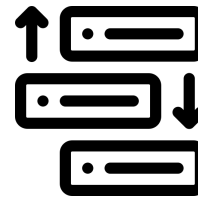
1. What Is Opto Health?



A digital check-in and streaming platform for the front door



Patients answer symptom questions on arrival via smartphone or tablet



Generates acuity score, presenting complaint, risk flags, and suggested pathway

Important

Opto does NOT diagnose.

Does NOT replace clinical judgement.

Does NOT autonomously stream.

Final clinical responsibility remains with the reviewing clinician at all times.

2. Clinical Safety Notices

Key Safety Messages

1. Opto is decision support only - clinicians remain accountable at all times
2. Patients may deteriorate after Opto assessment - monitoring is mandatory
3. Escalation must never be delayed - do not wait for Opto completion
4. A1-A5 scores must trigger appropriate action - clinical judgement is essential
5. Streaming remains a clinical decision - Opto supports, it does not decide

Acuity Scoring: A1 to A5

Score	Colour	Meaning & Expected Action
A1	Red	Life-threatening or limb critical. Requires IMMEDIATE assessment. Do not delay.
A2	Orange	Urgent assessment needed. Review within 10 minutes of arrival.
A3	Yellow	Assessment needed within 1 hour of arrival in the Emergency Department.
A4	Green	Assessment within 2 hours. ED or UTC. Consider streaming alternatives.
A5	Blue	Non-urgent. May be suitable for streaming to primary care or pharmacy.

Acuity scores support prioritisation only - not diagnoses.

Clinical judgement always overrides.

Four Must Do's

1. Open the assessment PDF

It may hold detail not in the summary: free text, safeguarding prompts, escalation flags

2. Apply clinical judgement

Confirm, override or escalate. You may change the score or pathway at any time

3. Keep watching the waiting room

Opto completion does not mean stable. Monitoring remains mandatory

4. Know the downtime drill

Revert to standard nurse-led assessment. Report IT issues to the Trust IT Service Desk, never Opto directly

**A patient who appears well may still carry A1 or A2 - always assess.
A patient who looks unwell but scores A4/A5 must be escalated - your judgement overrides.**



3. Operating Processes

1. **Patient Arrival and Check-In**
 1. Patient Arrival and Check-In (Patient Record Not Found or Overseas Patient)
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3.1. Patient Arrival and Check-In

This process ensures patients are registered, by completing their Opto streaming assessment to generate an initial acuity score and suggested streaming location. This is if the **patients record has been found** on CareFlow system.

Step	Key Points	Staff Action
1. Patient Arrival at A&E	Patient may be ambulatory, walk-in or referred from another service.	Welcome patient and direct them to begin the Opto assessment process.
2. Patient Registers and Completes Symptom Questionnaire	Assessment can be completed on a foyer tablet or the patient's personal device via QR code. Ensure accessibility, language and support requirements are met where necessary.	Patient completes the Opto assessment independently or with assistance if required.
3. Patient Proceeds to Reception	Patient assessment information is now available for review.	Reception team prepares for the patient to appear on the Opto Dashboard and CareFlow. CAS Frontsheet is automatically printed and attached to the CAS booklet.
4. Patient Arrives at Reception Desk	Patient registration and assessment completion should be confirmed within CareFlow.	Print patient labels and wristband in accordance with local Trust procedures.
5. Patient Directed to Waiting Area	Waiting location will depend on local operational arrangements and patient pathway.	Advise the patient where to wait pending clinical streaming or assessment.
6.1 Documentation Prepared for Secondary Assessment – ED	Opto Assessment PDF is available within CareFlow/Web V for clinical review.	Place notes in the ED Tray for the Secondary Assessor and ensure all required documentation is available.
6.2 Documentation Prepared for Secondary Assessment – UTC	Opto Assessment PDF is available within SystemOne for clinical review.	Place notes in the UTC Tray for RAIT Assessor and ensure all required documentation is available.
6.3 Documentation Prepared for Secondary Assessment – SDEC	Opto Assessment PDF is available within CareFlow/Web V for clinical review.	Reception team to close ED encounter to "streamed to SDEC" and picked up by SDEC team in CareFlow

3.1.1. Patient Arrival and Check-In – Patient Record Mismatch or Overseas

This process ensures patients are registered, by completing their Opto streaming assessment to generate an initial acuity score and suggested streaming location. This is if the **patients record has not been found on CareFlow system**, and either an overseas patient.

Step	Key Points	Staff Action
1. Patient Arrival at A&E	Patient may be ambulatory, walk-in or referred from another service.	Welcome patient and direct them to begin the Opto assessment process.
2. Patient Registers and Completes Symptom Questionnaire	Assessment can be completed on a foyer tablet or the patient's personal device via QR code. Ensure accessibility, language and support requirements are met where necessary.	Patient completes the Opto assessment independently or with assistance if required.
3. Patient Proceeds to Reception	Patient assessment information is now available for review.	Reception team prepares for the patient to appear on automatically on the Opto Dashboard and on CareFlow. CAS Frontsheet is automatically printed and attached to the CAS booklet.
4. Patient Arrives at Reception Desk	Patient registration and assessment completion should be confirmed within CareFlow.	An alert will appear on Microsoft Teams group channel alerting that there has been a patient mismatch, determine whether this is a patient record mismatch or an overseas patient requiring manual registration.
5.1 Patient Record Mismatch Identified	The patient cannot be automatically matched to the correct PAS/PDS record.	Complete a manual PAS and/or PDS lookup to identify the correct patient record. You may need to re-register the patient and Link the Opto assessment to the correct record, print patient labels and wristband, and refer the duplicate/mismatched record to the Data Quality Team for investigation and merging.
5.2. Overseas Patient Identified	The patient does not have a valid NHS record or requires overseas visitor registration processes.	Follow the Trust's overseas patient registration procedure. Create or update the patient record as required and print patient labels and wristband in accordance with local procedures.
6. Patient Directed to Waiting Area	Waiting location will depend on local operational arrangements and patient pathway.	Advise the patient where to wait pending clinical streaming or assessment.
7.1 Documentation Prepared for Secondary Assessment – ED	Opto Assessment PDF is available within CareFlow/Web V for clinical review.	Place notes in the ED Tray for the Secondary Assessor and ensure all required documentation is available.
7.2 Documentation Prepared for Secondary Assessment – UTC	Opto Assessment PDF is available within SystemOne for clinical review.	Place notes in the UTC Tray for RAIT Assessor and ensure all required documentation is available.
7.3 Documentation Prepared for Secondary Assessment – SDEC	Opto Assessment PDF is available within CareFlow/Web V for clinical review.	Reception team to close ED encounter to "streamed to SDEC" and picked up by SDEC team in CareFlow

3.2. Examples of Opto Health Registration Screen

These are example of the screen that patients will complete on arrival to the emergency department.

1
Check-in & Identity

2
Symptom Questionnaire

3
Free Text Entry

4
Completion Screen

Welcome
In order for us to get you registered please enter your details below

Jason
Smith
Male
16 08 1984
+44 07525453091
I do not have a phone number

Next

Where is your pain? (pick all that apply)

In the middle
Upper abdomen (tummy)
Lower abdomen (tummy)
Right side
Left side
All over

Next

Please tell us what medications you have taken and when you last took them

Paracetamol

Next

Thank you. You have been successfully registered. Please take a seat in the waiting room and listen for your name to be called. If your condition worsens or you start to feel unwell, please inform a member of staff immediately.

OK

How was your experience?

Excellent Good Fair Poor



3.3. Primary Assessor Streamer

This process supports the Primary Assessor to review Opto streaming assessments, validate the patient's presenting complaint and acuity score, identify any clinical risks or red flags, and determine the most appropriate priority and streaming destination using clinical judgement.

Step	Key Points	Staff Action
1. Review New Patients	Opto assessment available in CareFlow/Web V.	Review presenting complaint, acuity score and alerts.
2. Check Alerts & Red Flags	Stroke, safeguarding, risk to self, allergies, escalation prompts.	Prioritise patients requiring urgent review.
3. Clinically Assess Patient	Opto supports but does not replace clinical judgement.	Undertake a focused assessment and determine risk.
4. Monitor Waiting Room	Patients may deteriorate whilst waiting.	Maintain oversight and identify changes in condition.
5. Escalate Concerns	Deterioration, red flags or clinical concern identified.	Escalate immediately via local pathways.
6. Handover / Stream Patient	Patient ready for next stage of care.	Communicate findings and document actions taken.

Key Safety Points

- Review all alerts and red flags.
- Opto completion does **not** mean the patient is stable.
- Clinical judgement always overrides system outputs.
- Follow local escalation and deterioration SOPs at all times.

3.4. Example of Opto Assessment Registration Dashboard

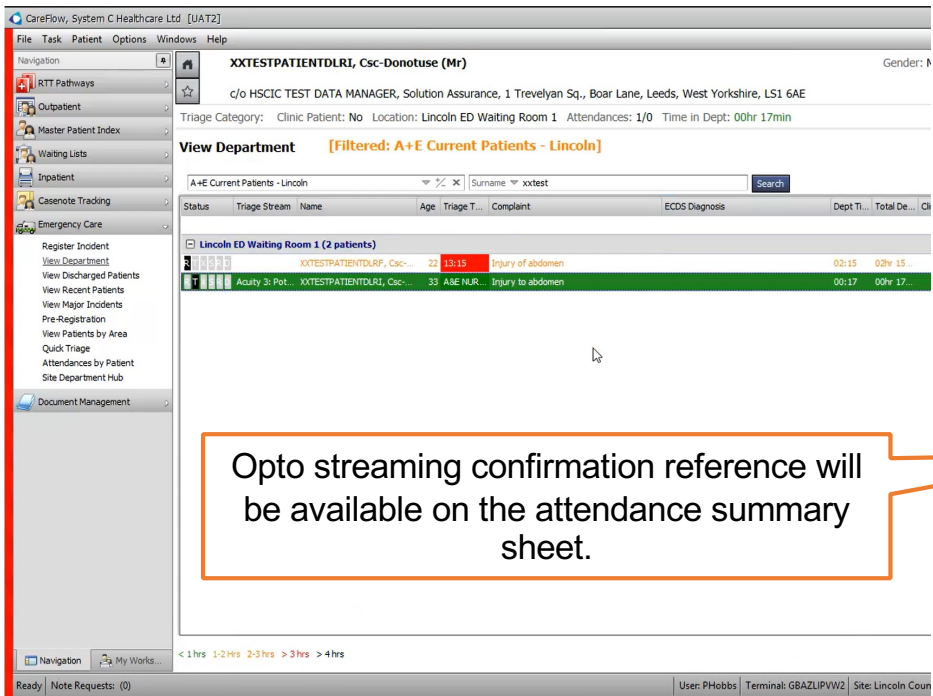
Once the patient has completed their Opto Assessment, confirmation will be available in the Opto assessment registration dashboard. This is accessible via - <https://ed.prod.eu-west-2.optohealth.ai/>
The patient will also be automatically registered onto CareFlow and SystemOne (if UTC).

The screenshot shows the Opto Assessment Registration Dashboard. On the left is a sidebar menu with items: Dashboard, Dynamic Users (highlighted with a red box), Pathway Listing, Public Health Questions, Isolation Questions, Admin List, Devices List, Raise a Clinical Safety Event, Raise a Technical Issue, Feedback, and Settings. The main area is titled 'User List' and has two tabs: 'Complete Triage' (selected) and 'Incomplete Triage'. In the top right of the main area are buttons for 'Download by UPIC' and 'Download'. A table lists users with columns: Avatar, Hospital Name, Version, UPIC, First Name, Family Name, NHS, Joining Date, Status, and Action. The table contains 8 rows of data. Annotations include: 1. A box pointing to the 'Dynamic Users' link in the sidebar with the text '1. To view completed assessment, click "Dynamic Users"'. 2. A box pointing to the ID number '8a8775' in the 'NHS' column with the text '2. To view Opto Assessment PDF - Click on the ID number'. 3. A box pointing to the 'Status' column with the text '3. Here is the status of where the patient has been streamed to, and which clinical system'.

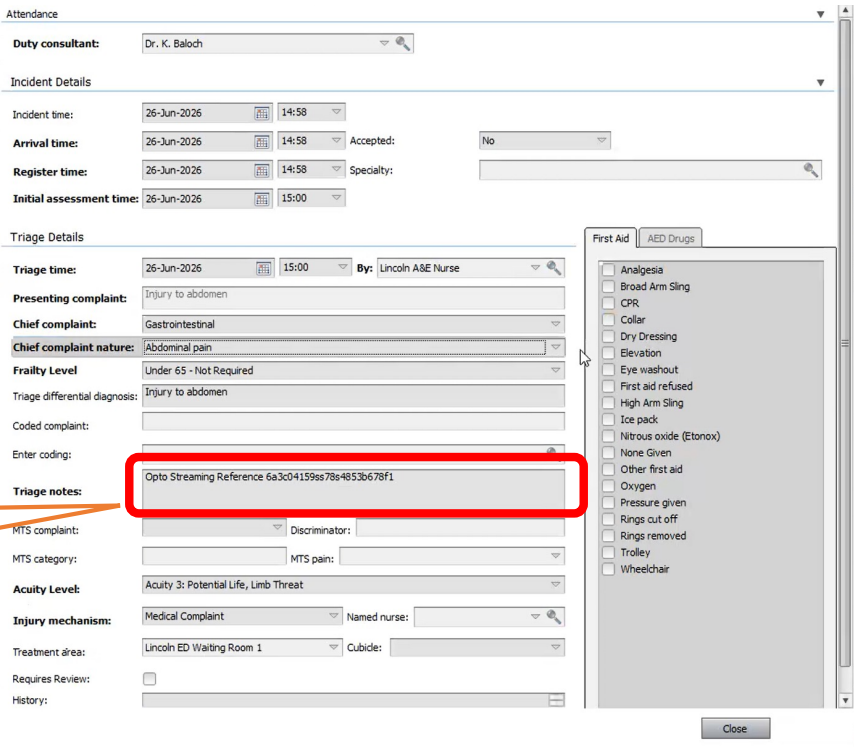
Avatar	Hospital Name	Version	UPIC	First Name	Family Name	NHS	Joining Date	Status	Action
	UK HOSPITAL DEMO	First person	123456				07-15-2026	Triaged to ED	Re-Triage
	UK HOSPITAL DEMO	Paediatric	123456				07-15-2026	Triaged to ED	Re-Triage
	UK HOSPITAL DEMO	Paediatric	123456				07-15-2026	Triaged to ED	Re-Triage
	UK HOSPITAL DEMO	Paediatric	123456				07-15-2026	Triaged to ED	Re-Triage
	UK HOSPITAL DEMO	Proxy	123456				07-15-2026	Triaged to ED	Re-Triage
	UK HOSPITAL DEMO	First person	123456				07-06-2026	Triaged to MEDSDEC	Re-Triage
	UK HOSPITAL DEMO	First person	123456			8a8775	07-14-2026	Triaged to UTC	Re-Triage
	UK HOSPITAL DEMO	Paediatric	123456			8a12	07-09-2026	Triaged to ED	Re-Triage
							07-09-2026	Triaged to UTC	Re-Triage

3.5.1 Examples of CareFlow Check-in Registration Confirmed

Once the patient has completed an Opto assessment, they will be automatically registered into CareFlow, a confirmation of this will appear in the triage notes.



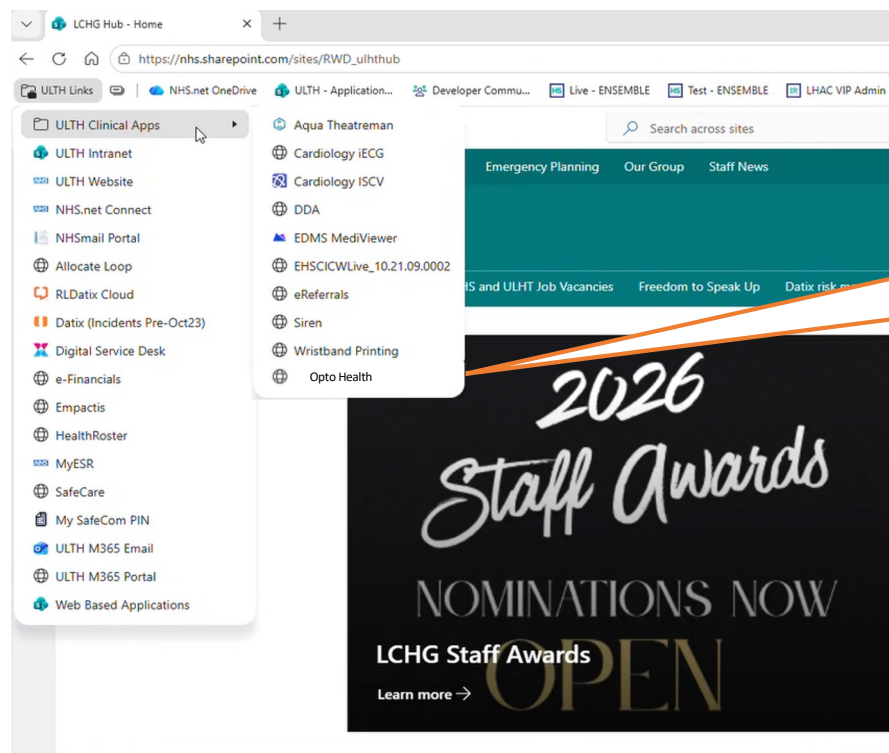
Example: Care Flow Triage Queue



Example: Clinical Record Triage Details

3.5.2 How to view Opto Assessment from CareFlow

By loading your internet browser, you will find a shortcut in ULTH Links that will automatically allow you to login to Opto assessment document viewer



The Opto Document Viewer will appear as a bookmark in the ULTH Clinical Apps menu in your browser.

On opening the link you will be logged in automatically

Example: Trust internet screen

3.6.1 Examples of SystemOne UTC Check-in Registration Confirmed

Once the patient has completed an Opto assessment, and identified a UTC patient, they will be automatically registered into SystemOne once they've been processed through CareFlow. Confirmation will be in the notes of the attendance summary.

The screenshot displays the SystemOne Triage Queue interface. The main table lists patient attendances with columns for Flags, Patient Cat., Forenames, Surname, Age, Triage, Arrival, Total Time, Responsible Parties, Location, Notes (Textual), Presenting Complaint, and Alerts. A red box highlights the row for patient 'Test Tpp', who is 27 years old, triaged at 15:22, and has a 3-minute total time. The 'Notes (Textual)' column for this patient contains the text: 'Opto streaming confirmation reference 6a3c04159...'. An orange callout box points to this note with the text: 'Opto streaming confirmation reference will be available on the summary sheet.'

Flags	Patient Cat.	Forenames	Surname	Age	Triage	Arrival	Total Time	Responsible Parties	Location	Notes (Textual)	Presenting Complaint	Alerts
!!	Wound Dressing	Henry	Visualisation	47y	?	13:05	52wks 1d 2h		John Coupland MIU		Abdominal pain	
!!	Wound Dressing	Uniform	Tango	11y	4	16:10	40wks 2d 23h		Peterborough MIU	hurt leg playing football		
!!	Wound Dressing	Tommy	Test	65y	4	09:29	7wks 2d 5h	(O) D Northage	Skegness MIU			
!!	Wound Dressing	George	Visualisation	70y	?	12:54	52wks 1d 2h		John Coupland MIU			
!!	Wound Dressing	Test	Tpp	27y	3	15:22	3m		Skegness M...	Opto streaming confirmation reference 6a3c04159...	Abdominal pain	
!!	Wound Dressing	Frank	Visualisation	49y	?	12:54	52wks 1d 2h		Coupland MIU		Joint swelling	
!!	Wound Dressing	Emma	Visualisation	8y	1	12:51	52wks 1d 2h		John Coupland MIU		Burn	
!!	Streaming	Wendy	Test	7y	4	14:37	19wks 3d 48m		Skegness MIU	Fell of bike		
!!	Streaming	Nic-Otp-Do...	Xotestpatien...	22y	?	13:40	1d 1h 45m	(O) J Lord	Skegness MIU	TEST TEST TEST	Abdominal Distention	
!!	Wound Dressing	Colin	Visualisation	58y	4	09:45	52wks 1d 5h		John Coupland MIU		Wound : sting	
!!	Wound Dressing	Bob	Visualisation	90y	4	09:40	52wks 1d 5h		John Coupland MIU		Injury of shoulder / arm / elbow / wrist / hand	
!!	Wound Dressing	Annie	Visualisation	23y	3	09:35	52wks 1d 5h		John Coupland MIU		Injury of hip / leg / knee / ankle / foot	

Example: SystemOne Triage Queue

3.6.2 How to view Opto Assessment from SystemOne UTC

SystemOne A&E: Paul Hobbs (Opto) (Other Community Health Service) at John Coupland MIU - A&E

Search Task Discard Save Record Details Next Note Quick Letter Acute **Opto**

Set Location Reset Filters Show In Window

Patient Totals by Category

Triage Category	Patient Category
All Triage Categories	16
1 Immediate resuscitation	1
2 Very urgent	1
3 Urgent	1
4 Standard	5
5 Non-urgent	0

Patient Totals by Place

All Places	Count
All Places	16

Patient Totals by Responsible Party

All Responsible Parties	Count
All Responsible Parties	16
No Responsible Party	14
Lord, Julia	1
Northage, Mrs Debbie	1

Patient Totals by Filter

Show All	Count
Show All	16

All Attendances

Flags	Patient Cat...	Forenames	Surname	Arrival	Total Time	Responsible Parties	Location	Notes (Textual)	Presenting Complaint	Alerts	Presenting Complaint
!!	Wound Dress	Henry	Visu...	13:05	52wks 1d 2h		John Coupland MIU		Abdominal pain		Abdominal pain
!!	Wound Dress								hurt leg playing football		
!!									Vomiting + / - nausea		
!!									Abdominal pain		
!!									Joint swelling		
!!		Emma	Visualisation	8y	12:51	52wks 1d 2h	MIU John Coupland MIU		Burn		
!!	Streaming	Wendy	Test	7y	14:37	19wks 3d 48m	Skegness MIU		Fell of bike		
!!	Nic-Qtp-Do...	Xtestpatien...	22y	13:40	1d 1h 45m	(O) J Lord	Skegness MIU		TEST TEST TEST		Abdominal Distention
!!		Colin	Visualisation	58y	09:45	52wks 1d 5h	John Coupland MIU		Wound : sting		
!!		Bob	Visualisation	90y	09:40	52wks 1d 5h	John Coupland MIU		Injury of shoulder / arm / elbow / wrist / hand		
!!		Annie	Visualisation	23y	09:35	52wks 1d 5h	John Coupland MIU		Injury of hip / leg / knee / ankle / foot		

16 attendances

Quick actions Alerts

Search features

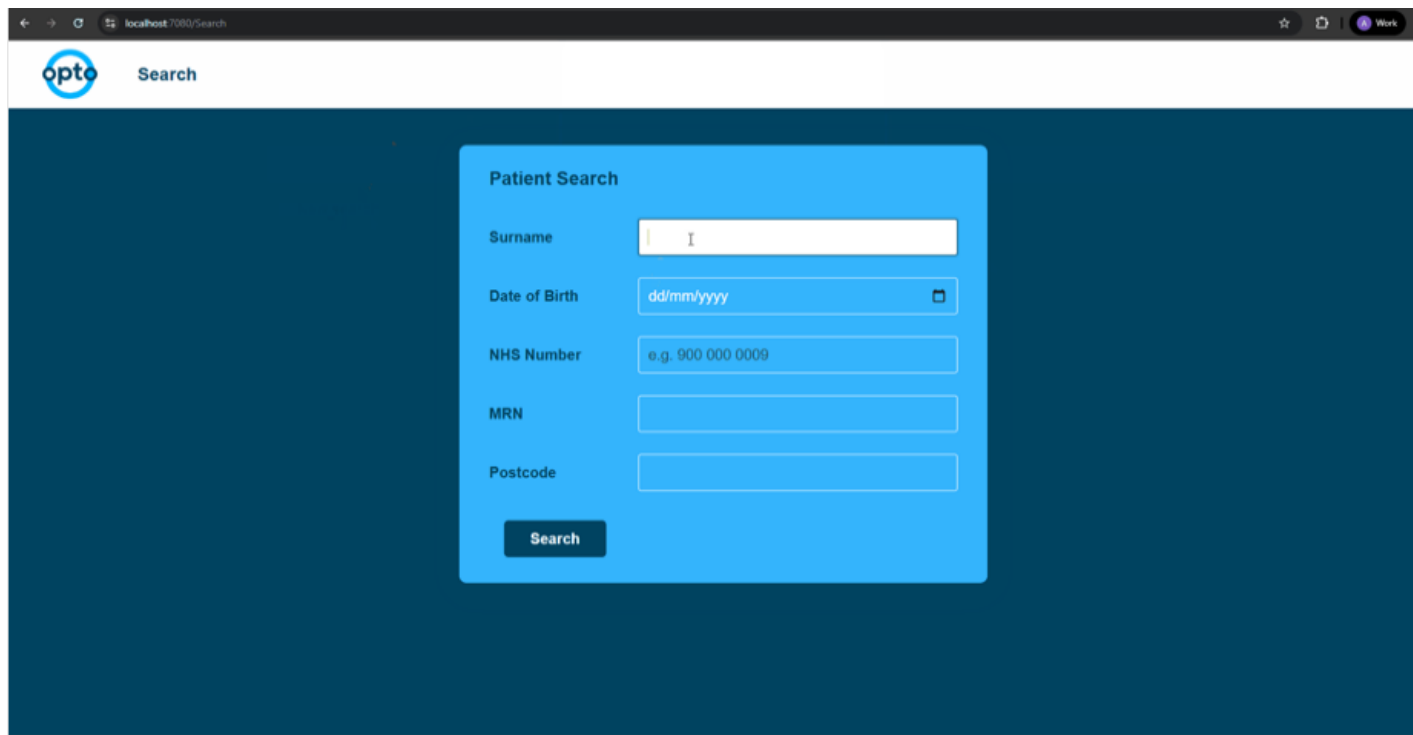
Mr Test Tpp

15:25

Example: SystemOne Triage Queue

3.7 Accessing the Opto Assessment Document Viewer

Once your internet browser has opened, you can search for your patient using their patient identifiable details. You will automatically be logged in. If you are not, please contact the IT Helpdesk.



The screenshot shows a web browser window with the address bar displaying 'localhost:7000/Search'. The page features the 'opto' logo and the word 'Search' in the top left corner. The main content area has a dark blue background. Centered on this background is a light blue 'Patient Search' form. The form contains five input fields: 'Surname' (with a cursor), 'Date of Birth' (with a date format 'dd/mm/yyyy' and a calendar icon), 'NHS Number' (with a placeholder 'e.g. 900 000 0009'), 'MRN', and 'Postcode'. A dark blue 'Search' button is located at the bottom of the form.

3.7.1 Accessing the Opto Assessment Document Viewer

A list of patients will appear, to view the assessment, click **view** next to the correct patient to open their Opto assessment.

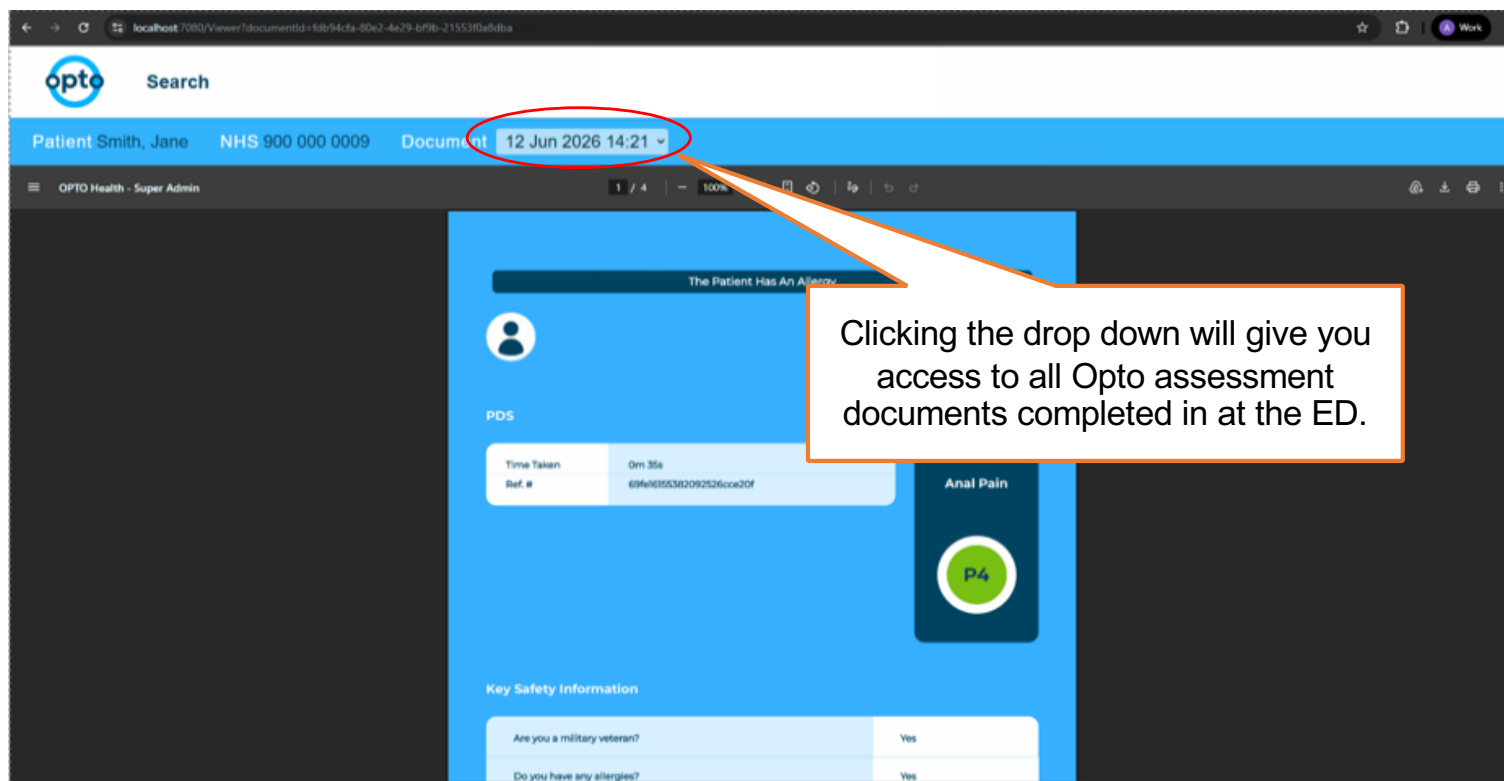
The screenshot shows a web application interface for searching patient records. The page has a dark blue header with the 'opto' logo and a 'Search' button. Below the header is a 'Search Results' table with columns: Name, Date of Birth, NHS Number, MRN, Documents, and a 'View' button. The table lists several patients, with the first row highlighted. A callout points to the 'View' button, stating: 'Click view to see the Opto assessments related to the patient'. Another callout points to the 'Documents' column, stating: 'The number of documents is the number of times patient a has completed an Opto Assessment in ED department'.

Name	Date of Birth	NHS Number	MRN	Documents	View
Smith, Jane	15 Jun 1985	900 000 0009	MRN-001	2	View
Smth, Jane	15 Jun 1985	900 000 0001	MRN-006	0	
Smth, Maria	17 Jan 2001	—	MRN-005	0	
Smth, Priya	08 Nov 1990	900 030 0025	MRN-008	0	
Smth, Robert	22 Mar 1972	900 000 2017	MRN-007	0	
Smth, Thomas	30 Aug 1955	900 400 0033	MRN-009	0	

[New search](#)

3.7.2 Accessing the Opto Assessment Document Viewer

When in the viewer, you will have access to all previous Opto assessment, please ensure you are viewing the correct assessment.





3.8 Business Continuity Process (Clinical System Down)

What should I do if the system isn't working as expected?

Scenario	What You'll See	What You Need To Do
Patient completes Opto but assessment is not appearing in SystemOne	Patient is registered in CareFlow and the Opto assessment PDF is available in Document Viewer.	Continue using CareFlow and review the Opto assessment PDF in Document Viewer. Follow local UTC downtime procedures if required. Report the issue to the IT Helpdesk
Patient completes Opto but does not appear in CareFlow	The patient has completed Opto, but no registration record is available in CareFlow. The Opto assessment remains available via Document Viewer.	Follow local downtime registration procedures and use the Opto assessment PDF to support assessment until normal service is restored. Report the issue to the IT Helpdesk
Patient unable to complete Opto assessment	The Opto assessment is unavailable or inaccessible.	Revert to the Trust's standard streaming or paper-based assessment process and continue the patient journey. Report the issue to the IT Helpdesk
Assessment information unavailable	Opto assessment cannot be accessed.	Revert to local paper-based or standard streaming processes until service is restored. Report the issue to the IT Helpdesk
Any system outage affecting patient flow	Staff unable to access information required for streaming or assessment.	Escalate to the Site Manager/Operational Lead and follow local downtime procedures.

If in doubt contact your local IT helpdesk to register the issue and alert site operations team.

If Opto or an integrated system is unavailable, patient assessment and clinical decision-making must continue using local business continuity procedures.