



# CLIENT AND GROUP ADMINISTRATOR MANUAL

June 2021

# Purpose

Flourish Client Administrators and Group Administrators can use this manual to learn how to manage Admin Tool users of their organization and run reports. This manual also covers general functionality, site registration, and site access.

# Getting Started

Registration is required to access the Flourish Admin Tool. The Insignia Health Administrator will create an account for the first Client Administrator in your organization, triggering a Welcome email to your inbox. Other Client and Group Administrators can be created by Insignia Health or by any Client Administrator of your organization. The registration process will be the same.

To complete registration:

Click the link in the Welcome email;

Choose a username and password;

Make note of your credentials in a confidential place for all future logins.

When entering a password, make sure it meets these criteria:

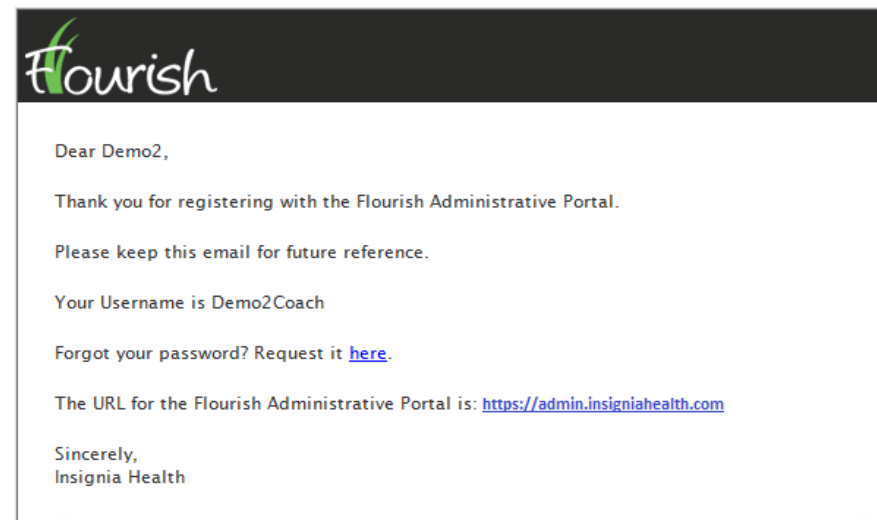
It has at least one upper case letter;

It has at least one lower case letter;

It has at least one number; and

It is between 8 and 16 characters long.

After completing registration, you will receive an email with your username, the URL of the site and a link to reset a lost password. Keep this email for future reference.



# Login

Navigate to <https://admin.insigniahealth.com>.

***Please, bookmark this site in your browser for future reference.***

Enter your username and password, and then click “Login.” If you enter an incorrect username or password, the system will show you an error message and you will need to re-enter the information. If you unsuccessfully enter your credentials after three attempts to sign in, you’ll be presented with a security measure that will assess if you are a threat to Flourish Admin. If you unsuccessfully enter your credentials and incorrectly answer the additional security after two more attempts, you will be locked out of Flourish Admin until Insignia Health Support can assist you.

Welcome to Flourish!

## Sign in

Please enter your username and password.

\* Username

[Forgot username?](#)

\* Password

Show Password [Forgot password?](#)

The Password field is required.

**Sign In**

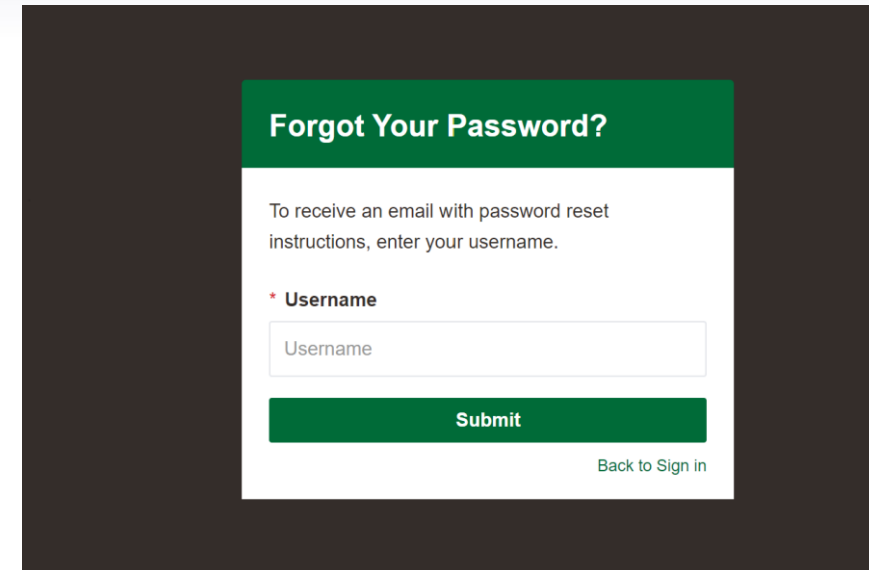
# Forgot Password/Login

If you forgot your password, click the "Forgot password?" link on the Login page and enter your username on the form. You will receive an email with a link to reset your password.

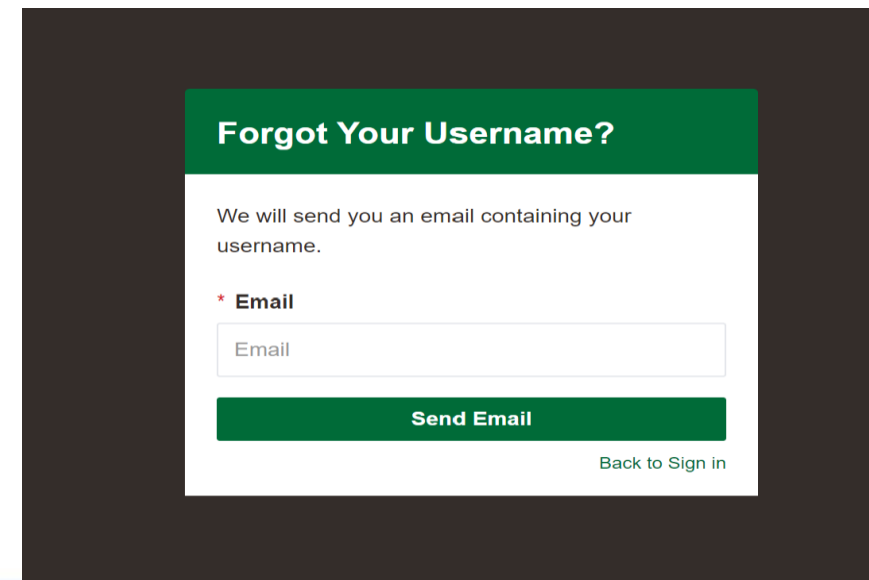
If you forgot your username, click the "Forgot username?" link on the Login page and enter your email address that that you have used to register your account. You will receive an email with your username.

*Upon completing your work with the system, click the "Log Off" button in the top right corner of the screen to securely close your session.*

*If you leave your browser open, your session will time out in 20 minutes and you will be logged out from the system.*



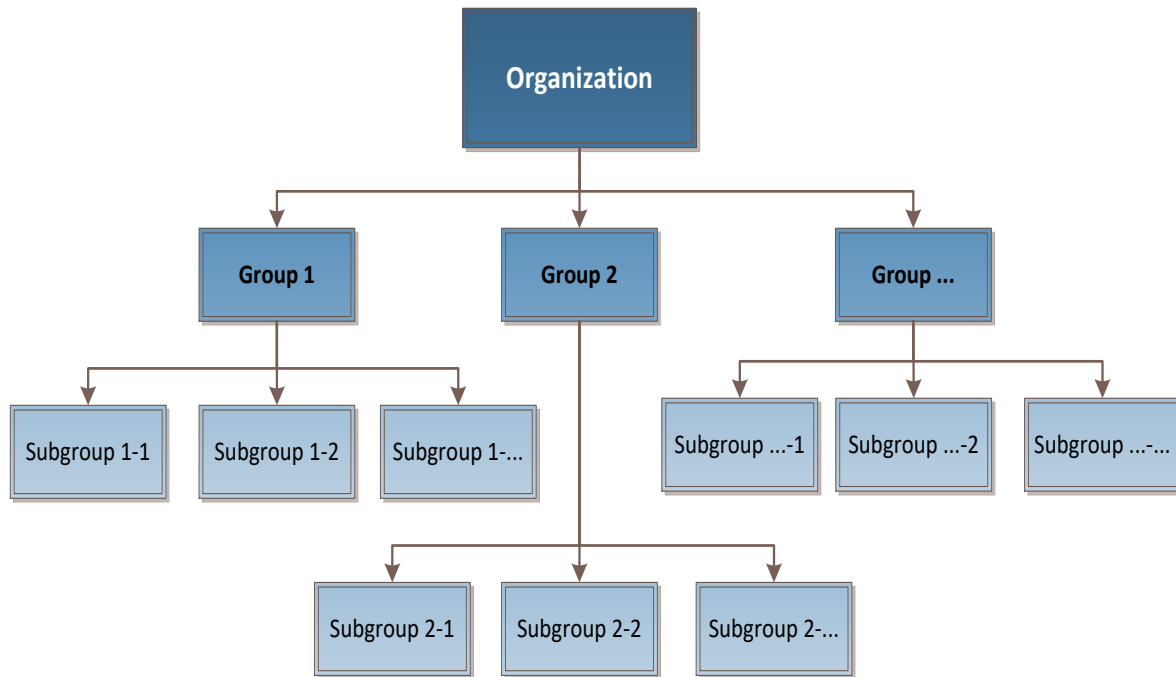
The screenshot shows a web form titled "Forgot Your Password?". The form has a dark green header with the title in white. Below the header, there is a white box containing the text: "To receive an email with password reset instructions, enter your username." Below this text is a label "\* Username" followed by a text input field with the placeholder text "Username". At the bottom of the form is a dark green button with the text "Submit" in white. In the bottom right corner of the form, there is a link "Back to Sign in" in a smaller font.



The screenshot shows a web form titled "Forgot Your Username?". The form has a dark green header with the title in white. Below the header, there is a white box containing the text: "We will send you an email containing your username." Below this text is a label "\* Email" followed by a text input field with the placeholder text "Email". At the bottom of the form is a dark green button with the text "Send Email" in white. In the bottom right corner of the form, there is a link "Back to Sign in" in a smaller font.

# ORGANIZATION SETTINGS

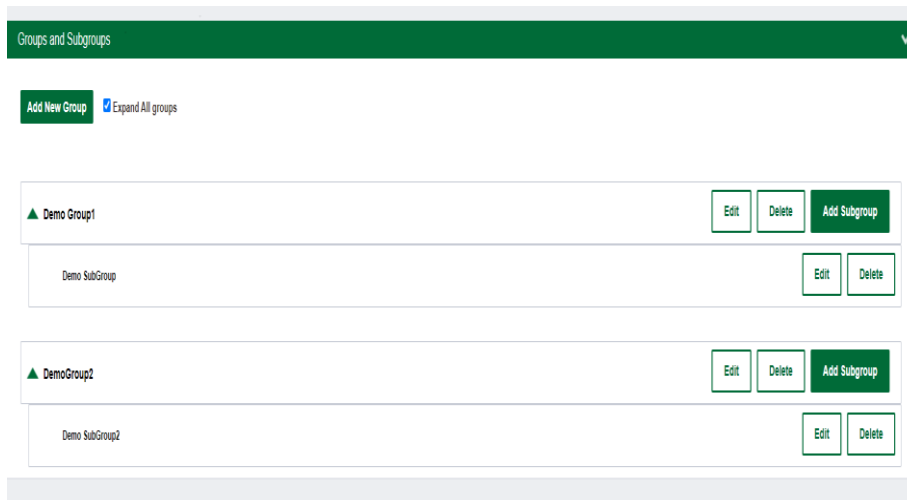
Insignia Health will set up your organization in the Flourish platform. Your organization's structure can consist of up to two levels of hierarchy: group(s) and subgroup(s).



Your organization can designate one or more “Client Administrator” users who can modify the group(s) and subgroup(s). A Client Administrator can assign groups and subgroups to Coaches. A Client Administrator may or may not have access to individuals’ data. Client Administrators without access to individuals’ data will not see any personal data for patients/members stored in the system. Group Administrators will have access limited to their groups and subgroups. They will be able to create Coaches only within their groups and subgroups.

# Manage Groups/Subgroups

Client Administrators will have access to manage their organization’s structure by adding, editing and deleting groups and subgroups. You will need to navigate to the Groups and Subgroups page by clicking “Groups & Subgroups” menu item on the left side. Group Administrators and Coaches will not have access to that feature. Groups and subgroups are displayed in alphabetical order.



### Edit Group

**Group Name:**  
Demo Group1

**Group External ID:**  
417900654

**Surveys:**  
Choose the surveys available to this group. Drag the surveys you wish to add to the "Assigned" box. Check the checkboxes to administer the survey or survey report on the Flourish Consumer website. Order the surveys in the order you wish them to be administered.

**Assigned**

PAM13\_S Intake route   
Display report

**Not Assigned**

CareGiverPAM13\_S  
ParentPAM13\_S

**Intake route:** Check this box to have the survey administered to all first-time users during the registration process.

**Display report:** If the survey has a report, check this box to have the survey report presented to a user during the registration process. It will also make the report visible on user's Survey Center.

**Group campaign:** Check this box to have the survey delivered during any active group campaigns. A group campaign delivers one or more surveys to a specific group during a set timeframe. For creating and managing group campaigns, refer to Survey Campaigns link on the left-navigation.

**Individual campaign:** Check this box to have the survey delivered to a user based on an individual's activities on the consumer site. Rules that define activities: number of days since last PAM, number of challenges completed, number of articles read. Rules are set at a client level for all available surveys.

**Submit** **Close**

Assign appropriate surveys to “assigned”

# Modify Groups and Subgroups

To edit a group name, you will need to click the “Edit” button next to the group name that you need to modify. You will be presented with the modal screen to modify the group name and survey settings. Make the required changes and click the “Submit” button to save them. The grey fields are read-only and cannot be edited. This screen displays the Group External ID that is used for API calls. It only applies to clients that have API integration.

To modify a subgroup, you will need to click the “Edit” icon next to the subgroup name that needs to be changed.

**Edit Group**

Group Name: Demo2

Group External ID: 417900654

**Surveys:**  
Choose the surveys available to this group. Drag the surveys you wish to add to the “Assigned” box. Check the checkboxes to administer the survey or survey report on the Flourish Consumer website. Order the surveys in the order you wish them to be administered.

**Assigned**

- PAM10  Intake route
- Display report
- Group campaign
- Individual campaign

**Not Assigned**

- PAM10\_S
- PAM13\_S

**Intake route:** Check this box to have the survey administered to all first-time users during the registration process.

**Display report:** If the survey has a report, check this box to have the survey report presented to a user during the registration process. It will also make the report visible on user’s Survey Center.

**Group campaign:** Check this box to have the survey delivered during any active group campaigns. A group campaign delivers one or more surveys to a specific group during a set timeframe. For creating and managing group campaigns, refer to Survey Campaigns link on the left-navigation.

**Individual campaign:** Check this box to have the survey delivered to a user based on an individual’s activities on the consumer site. Rules that define activities: number of days since last PAM, number of challenges completed, number of articles read. Rules are set at a client level for all available surveys.

Submit Close

You can delete a group or subgroup by clicking the “Delete” icon next to the group or subgroup. The system will show an error message if you try to delete a group or subgroup that has individuals or coaches assigned to it.

Groups and Subgroups

Add New Group  Expand All groups

▲ Demo Group1

- Demo SubGroup

▲ Demo Group2

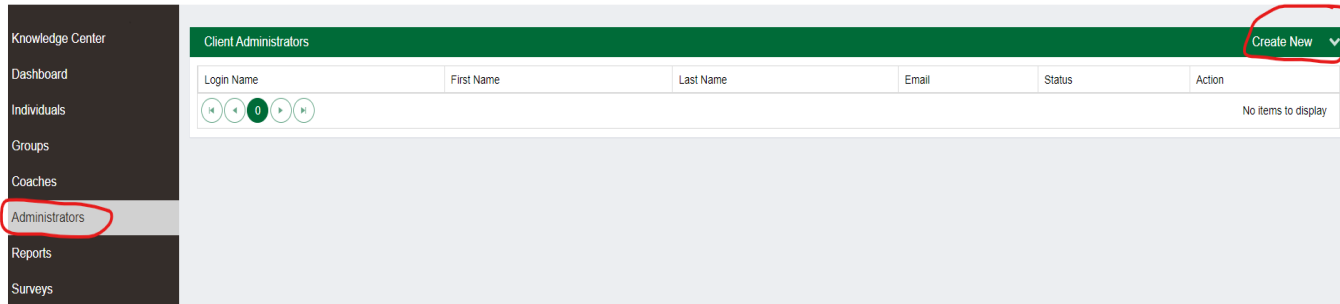
- Demo SubGroup2



# Admin Tool Users

## Create Client Administer

To create a new client administrator, select "Client Administrators" from the left side navigation bar. You will be presented with a list of all client administrators registered for your organization. The first time you view this page, there may be only one record for your account.



Click "Create New" button on the top right of the Client Administrators bar and fill out the form. You can limit Client Administrator's access to personal data by unchecking the "Allow this user to view individual profiles" checkbox. This type of user will have no access to functionality that allows them to see any Individual information including Individual Profiles, Search, Surveys and some reports. This role can only view aggregated reports, manage Groups and Subgroups, and create Group Administrators and Coaches

## Create New Client Administrator

Use the form below to create a new account. The user will be sent an email with a link where they can choose a username and password.

### Account Information

First Name:

Last Name:

Contact Information:

Other Settings:

Allow this user to view individual profiles. [?](#)

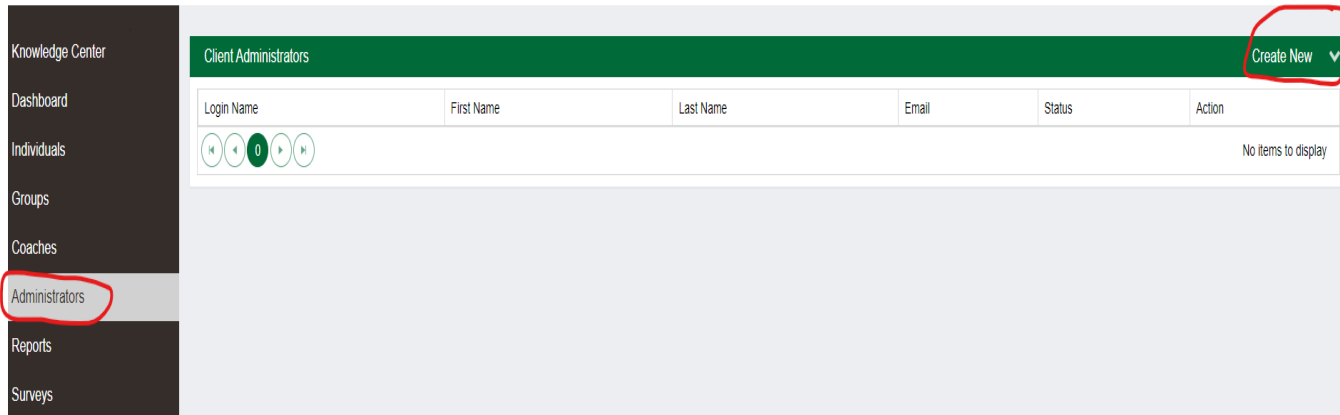
If your organization is configured for SSO integration or to access the PAM Application, this form may have additional settings. The manual does not cover these details. Insignia Health's implementation team will work with your organization's team to help define all required account settings.

After submitting this form, the system will send a Welcome email to the identified email address. The account will be in *Pending* status until the user completes registration by creating a username and password. After that, the account status will change to *Active*.

# Admin Tool Users

## Create Group Administer

To create a new group administrator, select "Group Administrators" from the left side navigation menu. You will be presented with a list of Group Administrators registered for your organization. It may have no records when you see this page for the first time.



Click "Create New" button on the top right of the Group Administrators bar and fill out the form. In addition to personal information, you will need to identify groups and subgroups that this person will have access to. You can also choose if the Group Administrator needs to have access to reports.

*After submitting this form, the system will send a Welcome email to the identified email address. The account will be in Pending status until the user completes registration by creating a username and password. After that, the account status will change to Active.*

The screenshot shows the 'Create New Group Administrator' form. The form is titled 'Create New Group Administrator' and includes a sub-header 'Account Information'. The form fields are: First Name, Last Name, Contact Information (Email Address), and Other Settings. The Other Settings section includes a checkbox for 'Allow this account to view reports.' and a section for 'Allow this account to manage individuals from the following groups:' with two checked options: 'Demo Group1' and 'DemoGroup2'. At the bottom of the form, there are buttons for 'Check All', 'Uncheck All', 'Cancel', and 'Submit'.

If your organization is configured for SSO integration or to access the PAM Application, this form may have additional settings. The manual does not cover these details. Insignia Health's implementation team will work with your organization's team to help define all required account settings.

# Admin Tool Users

## Create Coach

To create a new coach, select "Coaches" from the left side navigation menu. You will be presented with a list of Coaches registered for your organization. It may have no records when you see this page for the first time

Login Name	First Name	Last Name	Email	Status	Action
CoachdemoMOM	MOIM DEMO	Account	demoaccount@insignahealth.com	Active	Edit
JaneSmith1	Jane	Smith	janesmith@email.com	Locked	Edit

Click "Create New" button on the top right of the Coaches bar and fill out the form. In addition to personal information, you will need to identify groups and subgroups that this person will have access to. You can also choose if the Coach needs to have access to reports and if the Coach needs to be able to assign other Coaches to individuals.

*After submitting this form, the system will send a Welcome email to the identified email address. The account will be in Pending status until the user completes registration by creating a username and password. After that, the account status will change to Active.*

**Create New Coach**

Use the form below to create a new account. The user will be sent an email with a link where they can choose a username and password.

**Account Information**

**First Name:**  
First Name

**Last Name:**  
Last Name

**Contact Information:**  
Email Address

**Other Settings:**

Allow this account to view reports.  
 Allow this coach to assign coaches to individuals.

Allow this account to manage individuals from the following groups and subgroups:

- Demo Group1
- DemoGroup2

Check All     Uncheck All

Cancel    Submit

If your organization is configured for SSO integration or to access the PAM Application, this form may have additional settings. The manual does not cover these details. Insignia Health's implementation team will work with your organization's team to help define all required account settings.

# Admin Tool Users

## Re-Send Email

If this email is unable to be found by the Coach or Group Administrator – and their accounts are still in *pending* status – the Client Administrator can re-send a Welcome email from the Edit Account Screen. You may want to check your Spam or Junk folders before requesting for the email to be re-sent.

**Edit Account**

Use the form below to update the individual account information.

**Account Status**

Options: Pending

A "Pending" account has not been activated and does not have access to the system.  
If "Active" is selected, you will be prompted to create username and password for this account.  
If "Deactivated" is selected, you will be removing the user from the system and they will no longer be able to access the system.

**Resend Welcome Email**

**Account Information**

**First Name:**  
TEstUser

**Last Name:**  
Demo

**Contact Information:**  
testuser@email.com

**Other Settings:**

**Role:**  
Coach

Allow this account to view reports.  
 Allow this coach to assign coaches to individuals.  
Allow this account to manage individuals from the following groups and subgroups:

- Demo Group1
- DemoGroup2

## Activate Admin Tool User

Client and Group Administrators are able to activate other Admin Tool users from their organization by clicking the Activate button from the list of users. This function will imitate a registration process for pending users. You will have to create a username and password on behalf of that user. You will need to share this information with the user. The user should be encouraged to change his or her password after the first login.

Login Name	First Name	Last Name	Email	Status	Action
CoachdemoMOM	MOM DEMO	Account	demoaccount@insignahealth.com	Active	<a href="#">Edit</a>
JaneSmith1	Jane	Smith	janessmith@email.com	Locked	<a href="#">Edit</a>
OZDBXDK6ZT	TEstUser	Demo	testuser@email.com	Pending	<a href="#">Edit</a> <a href="#">Activate</a>

1 - 3 of 3 items

# Admin Tool Users

## Lock/Unlock User Account

If you need to temporarily close a user's access to the Admin tool, you can lock the user's account by selecting "Locked" from the Account Status drop down on the user's Account Information page. To do that, you first need to find the user's account profile on the list of Client Administrators or Coaches and click on the "Edit User" button. When this user attempts to login to the Admin Tool, they will get an error message and will not be able to access the system. To give access to the system back to the user, you will need to select "Active" Account Status on the user's account page.

**Edit Account**

Use the form below to update the individual account information.

**Account Status**

Options: **Locked** ▾

A "Locked" status temporarily removes user access to the system.  
If "Active" is selected, the user will be able to access the system.  
If "Deactivated" is selected, you will be removing the user from the system and they will no longer be

**Account Information**

**Username:**

JaneSmith1

## Deactivate User

If you need to permanently cancel a user's access to the Admin tool, you will need to change the user's account status to *Deactivated* on their Account Information page. All individuals assigned to the Coach will revert to unassigned. These individuals will still need to be assigned to a new Coach (or Coaches). If an individual is assigned to more than one Coach, the individual will only be unassigned from the Coach that was deactivated. Deactivated coaches will also not appear on the Coach drop-down list available to the end user.

**Edit Account**

Use the form below to update the individual account information.

**Account Status**

Options: **Deactivated** ▾

An "Active" status allows a user to have access to the system.  
If "Locked" is selected, the user will not be able to log into the system.  
If "Deactivated" is selected, you will be removing the user from the system and they will no longer be able to access the system.

**Account Information**

**Resend App Email**

**Username:**

CoachJohn

**First Name:**

John

**Last Name:**

Smith

# Uploads

You will need to download a template first. It includes instructions about how to fill in the EF and a detailed description of the fields that can be loaded. The template also has columns for PAM survey data.

Client Administrators will have access to the upload eligibility files (EF) feature. Eligibility files are required to enforce validation of individuals during the registration process. Only individuals added through eligibility files will have access to Flourish consumer site for your organization.

Client Administrators will also be able to upload PAM surveys for new or existing individuals by using the same upload feature. The file will have to include additional columns with survey data. Detailed instructions are provided within the template that can be downloaded from the Uploads page.

To get started, you will need to select the “Uploads” menu item to see the Uploads screen. It contains these options:

Download EF template;

Upload new file;

View history of previously uploaded files.

The screenshot shows the 'Eligibility File Upload Instructions' page. It contains two columns of text. The left column provides a numbered list of 8 steps for uploading a new file. The right column instructs the user to click a 'Download template' button. Below the instructions is a button labeled 'Upload New Eligibility File'. Underneath is a table titled 'Eligibility Files' with columns for File name, Date and time, User, Status, and Action. The table lists six files, all with a 'Rejected' status. Each row has a 'Summary' button, and some rows also have a 'Details' button.

File name	Date and time	User	Status	Action
[REDACTED] Client Databank Final.csv	05/20/2021 06:49:58 PM (UTC)	[REDACTED]	Rejected	Summary Details
[REDACTED] Client Databank Final.csv	05/20/2021 06:43:03 PM (UTC)	[REDACTED]	Rejected	Summary Details
5.20.21.csv	05/20/2021 06:35:37 PM (UTC)	[REDACTED]	Rejected	Summary
5.20.21.csv	05/20/2021 06:33:48 PM (UTC)	[REDACTED]	Rejected	Summary
5.20.21.csv	05/20/2021 06:03:43 PM (UTC)	[REDACTED]	Rejected	Summary Details
5.20.21.csv	05/20/2021 05:40:56 PM (UTC)	[REDACTED]	Rejected	Summary Details

# Uploads

When you have your EF ready, you can upload it by clicking the “Upload New Eligibility File” button. You will be presented with a dialogue to select a CSV file, and once you do, the system will start processing it. You will see its status in the Eligibility Files table. If the file is processed successfully, you can view a Summary report with the total number of records that were processed. You will see new individual accounts being added when you go back to your dashboard.

The EF will get rejected if it has at least one error. You will see a Report button next to the file’s status that will bring up a detailed report with all the errors that the system finds in the uploaded EF. It will refer to a record number in the file and an error description. After fixing all errors, you can upload your file again without changing its name.

The system will automatically send a confirmation email to the user who uploaded the file indicating whether the upload was successful or not.

**Eligibility File Upload Instructions**

To upload a new file, follow the directions below.

1. Click the “Upload New Eligibility File” button below. This will open up the ‘browse’ function on your computer.
2. Browse to where ever your complete file is located.
3. Select the file you wish to upload.
4. Complete your upload.
5. The file should upload in 2-3 minutes. Click ‘refresh’ to update the status of the file.
6. Once the file has been uploaded, you will receive an on screen status confirmation. If the upload was successful, your file has been uploaded. If the upload is rejected than the file is not successful. Check the “Details” button to identify where errors occurred prior to re-uploading.
7. Once the file has been successfully uploaded, individuals can begin registering for the consumer site.
8. If the file you have loaded contains PAM data to be scored, this may take some extra time. The screen will indicate that it is currently scoring the survey.

To download the eligibility file template, click the button be

[Download template](#)

[Upload New Eligibility File](#)

**Eligibility Files**

All attempts, successful and failed, to upload an EF will be recorded and presented in this table.

# Cancel/Remove Survey

## Pending Survey

Pending surveys that were scheduled manually through the Flourish Admin site can be canceled. To do so, you need to click the “Cancel this Survey” button for the pending survey. A canceled survey will not be delivered to the individual. Pending surveys that were created through the Flourish consumer site cannot be canceled and will not have “Cancel” button available.

## Cancel Survey

Survey responses that were entered through Flourish Admin, via API or through the eligibility file can be removed by Admins and Coaches. You will need to open the individual’s profile, select Surveys tab, find a survey on the Past Survey Results table and click the “Remove” button. Surveys that were entered through the Flourish consumer site cannot be removed and will not have the “Remove” button available.

The screenshot displays the 'Surveys' tab for an individual's profile. At the top, there are tabs for 'Profile', 'Surveys', and 'Notes'. Below these, the individual's information is shown: Individual Identifier: EnrolleeID1234, PAM Level: 1, Score: 47.00, Score Change: 0.00, and Last Surveyed: 06/09/2021. A 'Start New Survey' button is visible on the right. Below this is a section titled 'Past Survey Results' containing a table with the following data:

Date Completed	Survey Name	Survey Mode	Survey Delivery Mode	PAM Level	PAM Score	Details
06/09/2021 04:21:38 PM (UTC)	PAM13_S	Admin	Paper	1	47.00	<a href="#">Details</a> <a href="#">Health Style</a> <a href="#">Remove</a>

At the bottom of the table, there are navigation arrows and a page indicator '1 - 1 of 1 items'. The 'Remove' button in the 'Details' column is highlighted with a red circle.



# Client History

On the left navigation panel of Flourish Admin, Client and Group Admins can click on Client History and view a table with date and time, history action, description, Admin username, and in some cases the individual's Insignia Health ID. Client History tracks usage within the past 30 days. For enhanced usability, this page can also be downloaded via CSV file.

Specifically, Client History tracks:

Which admin users have accessed the system and the time/date.

Which admin users have accessed classic CFA and the time/date.

Which admin users have downloaded reports and the time/date.

When Coaches are assigned/unassigned to individuals and time/date.

When Coaches schedule, complete, cancel, or remove a survey for an individual and the time/date.

Client History				Download CSV
Date (UTC Time)	Admin User	History Type	Description	
06/11/2021 07:04:15 PM (UTC)	IT Check	Authenticated	User: itcheck accessed the Flourish client site.	
06/11/2021 06:53:49 PM (UTC)	IT Check	Authenticated	User: itcheck accessed the Flourish client site.	
06/11/2021 06:43:50 PM (UTC)	IT Check	Authenticated	User: itcheck accessed the Flourish client site.	
06/11/2021 06:33:48 PM (UTC)	IT Check	Authenticated	User: itcheck accessed the Flourish client site.	
06/11/2021 06:23:49 PM (UTC)	IT Check	Authenticated	User: itcheck accessed the Flourish client site.	
06/11/2021 06:14:03 PM (UTC)	IT Check	Authenticated	User: itcheck accessed the Flourish client site.	
06/11/2021 06:10:45 PM (UTC)	John Smith	CFA Action Step Not Applicable	Action step [Talk about the individual's biggest food or beverage "pitfall" (Sugar? Fat? Salt? Sugary drinks? Alcohol? High-calorie snacks? Late-night eating? Ice cream? Big restaurant portions?). Ask individual to identify one pitfall that could be improved.] for goal [Gain awareness of current dietary habits] of Hypertension, Diet & Nutrition, PAM Level 1 was marked as Not Applicable for individual 170921-5445B49FCAC94BA1B5.	
06/11/2021 06:10:42 PM (UTC)	John Smith	CFA Action Step In Progress	Action step [Talk about how to: Eat more whole grains, fruits, vegetables, lean meats, low-fat dairy, etc. Eat less salt, fat, red meats, desserts, sugary drinks, etc. ] for goal [Gain awareness of current dietary habits] of Hypertension, Diet & Nutrition, PAM Level 1 was marked as In Progress for individual 170921-5445B49FCAC94BA1B5.	
06/11/2021 06:10:41 PM (UTC)	John Smith	CFA Action Step Complete	Action step [Together, create a list of all foods and beverages individual has consumed in the past 24 hours. Highlight all foods that follow the DASH diet plan. Circle all foods that do NOT follow the DASH diet plan. ] for goal [Gain awareness of current dietary habits] of Hypertension, Diet & Nutrition, PAM Level 1 was marked as Complete for individual 170921-5445B49FCAC94BA1B5.	