CLIENT AND GROUP ADMINISTRATOR MANUAL

June 2021

Purpose

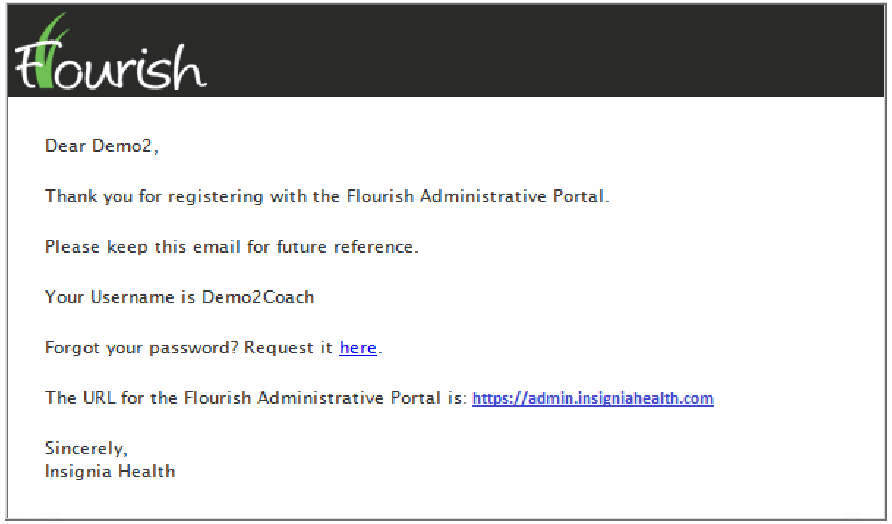
Flourish Client Administrators and Group Administrators can use this manual to learn how to manage Admin Tool users of their organization and run reports. This manual also covers general functionality, site registration, and site access.

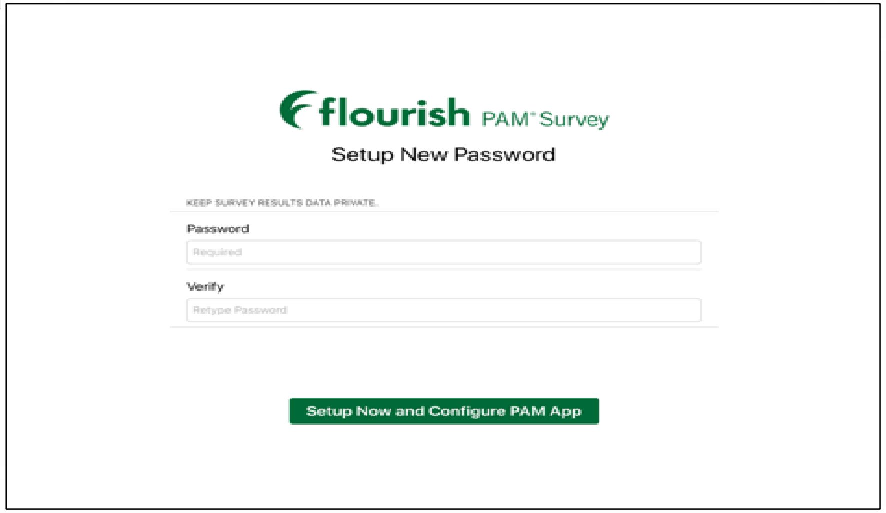
Getting Started

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.

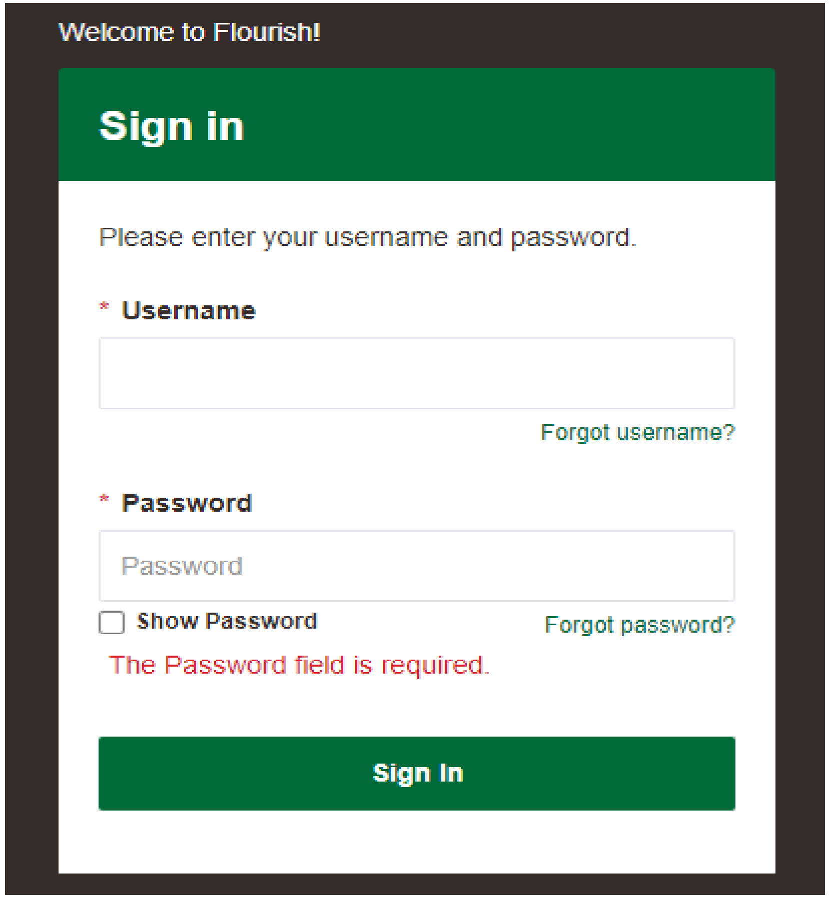
When entering a password, make sure it meets these criteria:
It has at least one upper case letter;
It has at least one lower case letter;
It has at least one number; and
It is between 8 and 16 characters long.
After completing registration, you will receive an email with your username, the URL of the site and a link to reset a lost password. Keep this email for future reference.





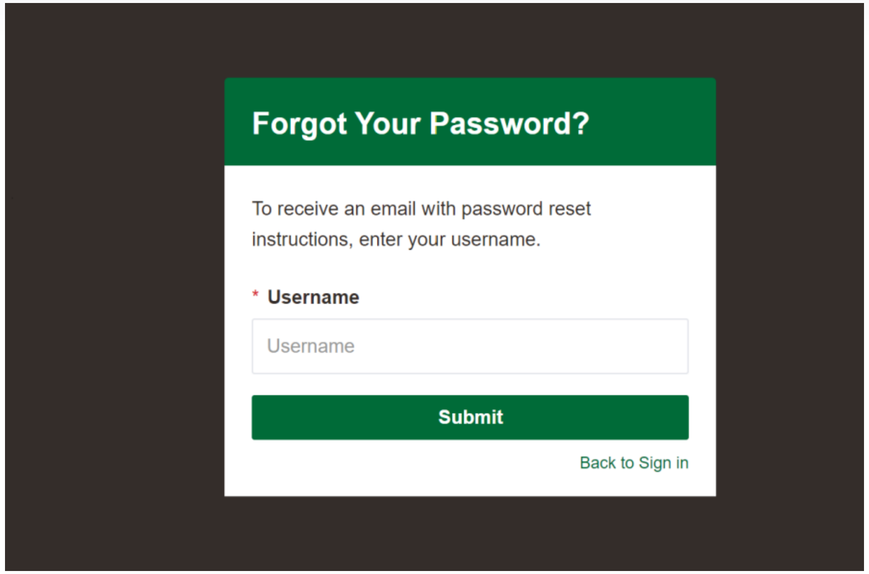
Login

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.

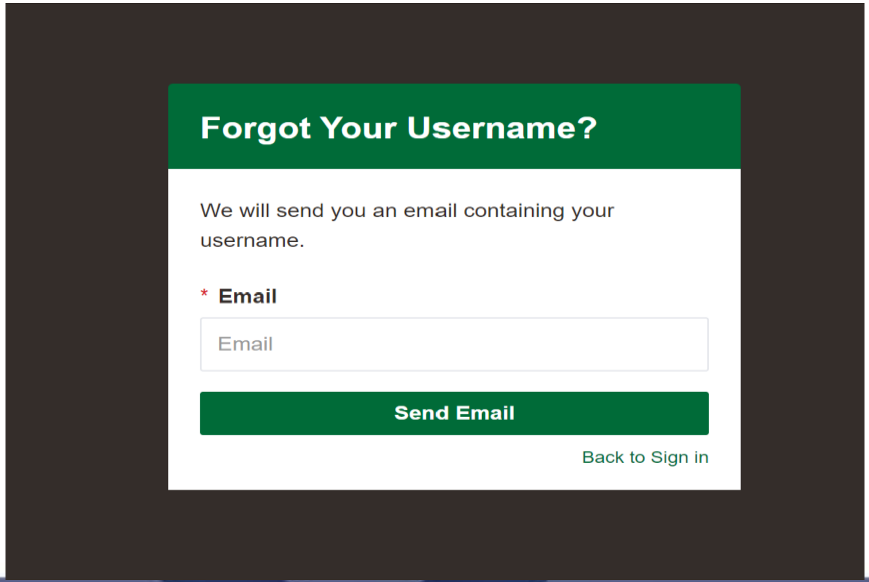


Forgot Password/Login

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.



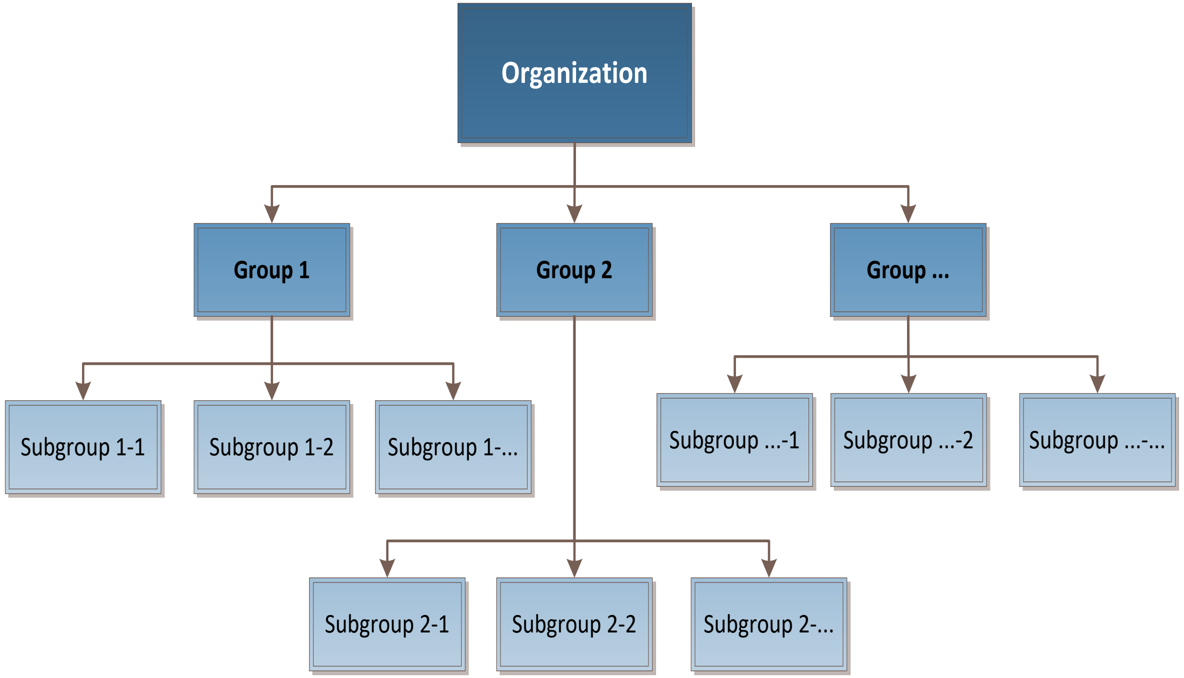
If you forgot your username, click the "Forgot username?" link on the Login page and enter your email address that that you have used to register your account. You will receive an email with your username.



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.

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).

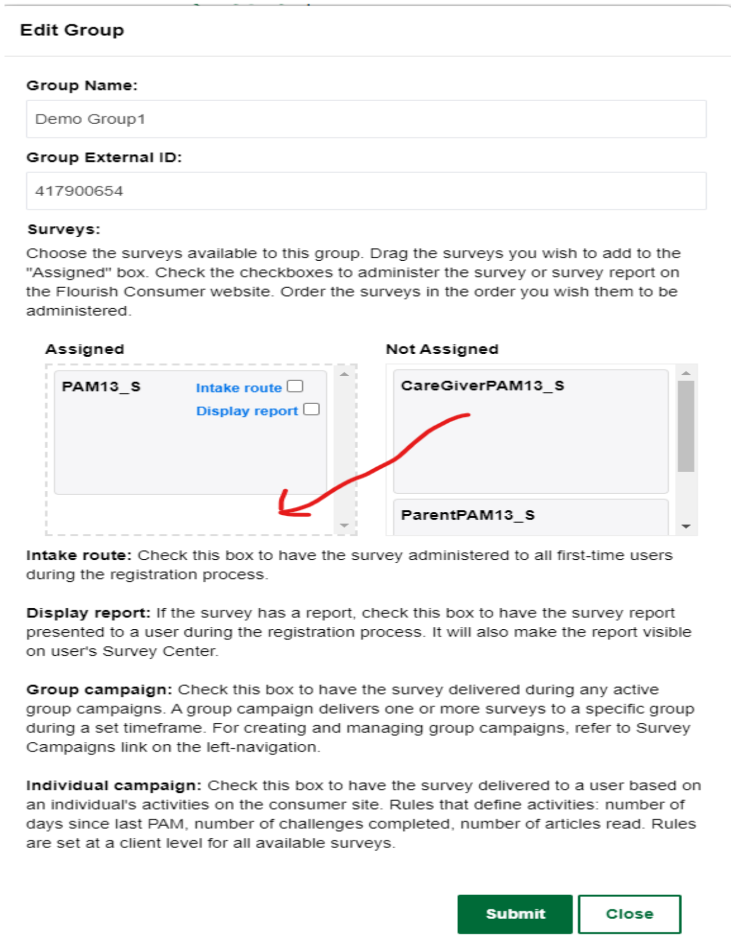


Your organization can designate one or more "Client Administrator" users who can modify the group(s) and subgroup(s). A Client Administrator can assign groups and subgroups to Coaches. A Client Administrator may or may not have access to individuals' data. Client Administrators without access to individuals' 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

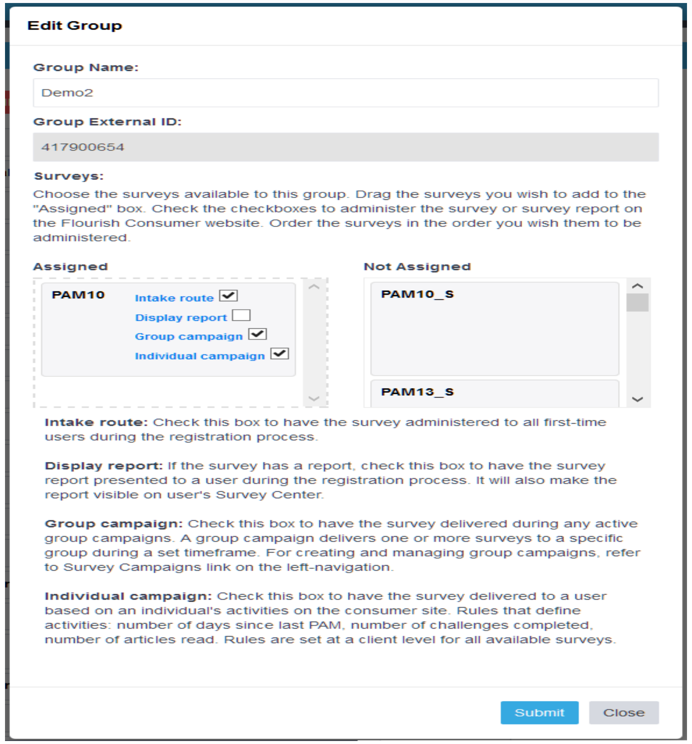
Client Administrators will have access to manage their organization’s structure by adding, editing and deleting groups and subgroups. You will need to navigate to the Groups and Subgroups page by clicking “Groups & Subgroups” menu item on the left side. Group Administrators and Coaches will not have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



Assign appropriate surveys to “assigned”

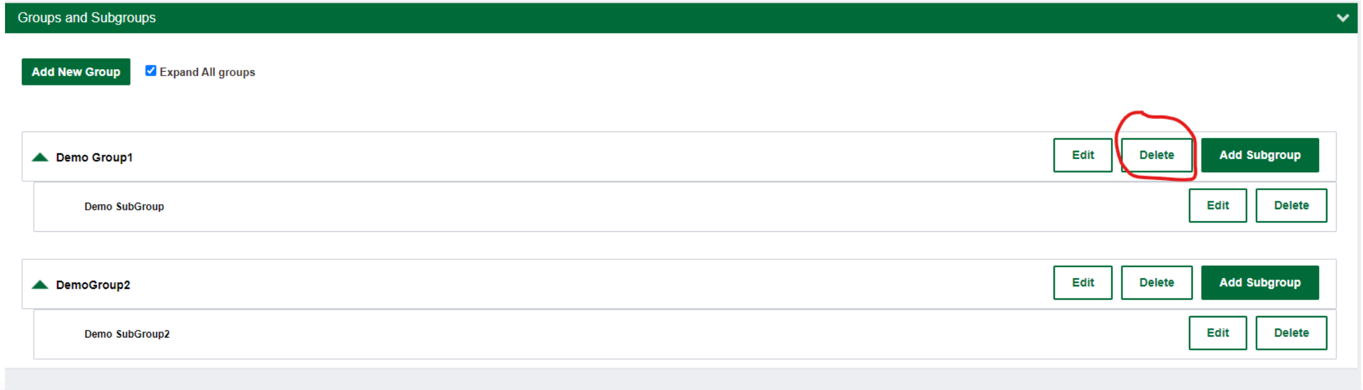
Modify Groups and Subgroups

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.

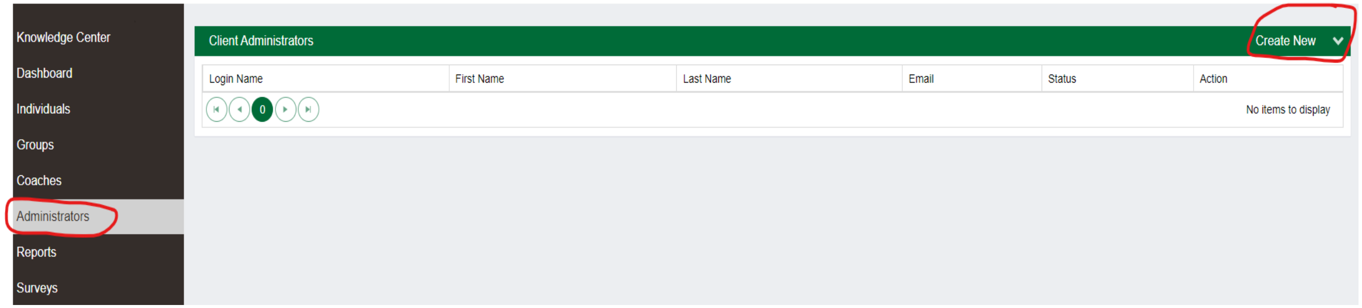
You can delete a group or subgroup by clicking the “Delete” icon next to the group or subgroup. The system will show an error message if you try to delete a group or subgroup that has individuals or coaches assigned to it.

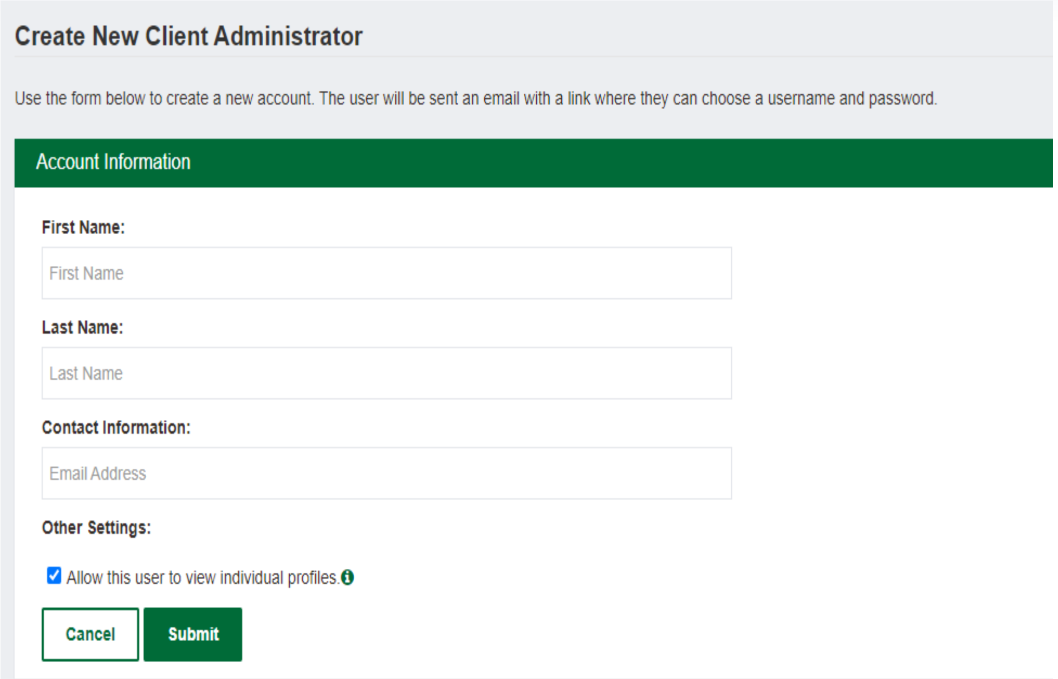


Admin Tool Users

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

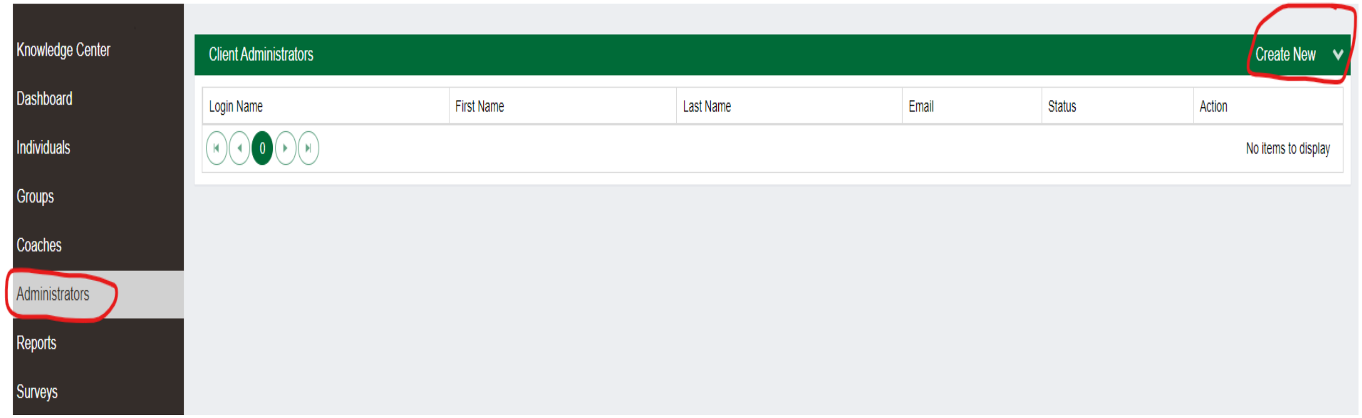
If your organization is configured for SSO integration or to access the PAM Application, this form may have additional settings. The manual does not cover these details. Insignia Health's implementation team will work with your organization's team to help define all required account settings.

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

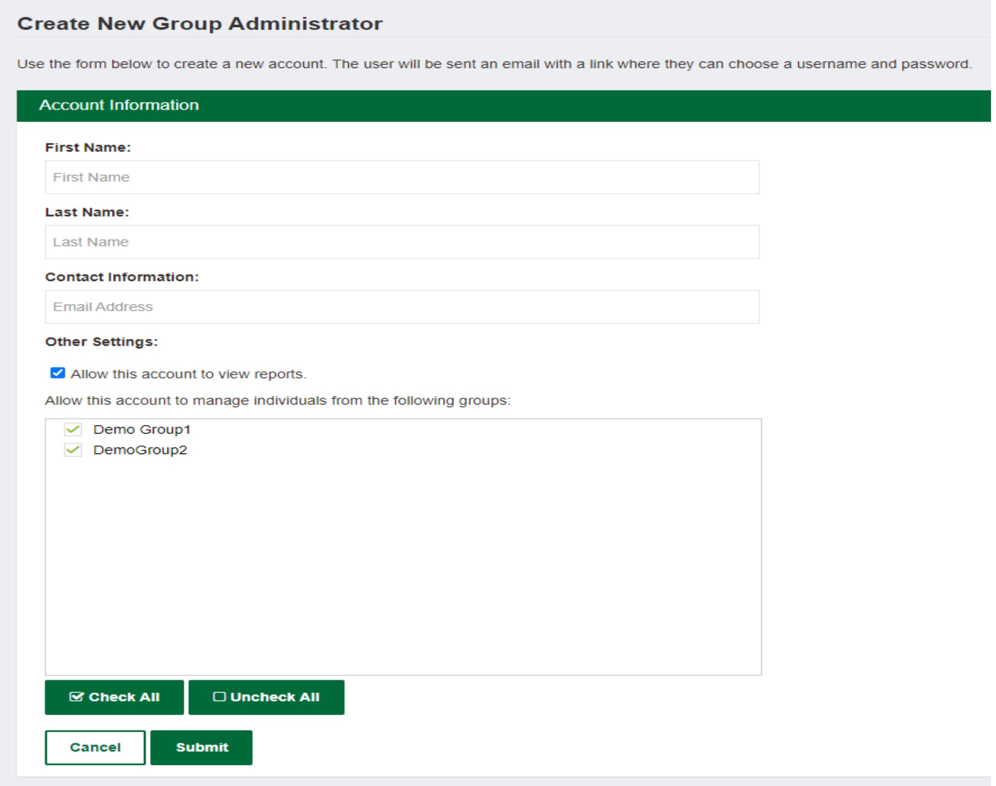
Create Group Administer

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.

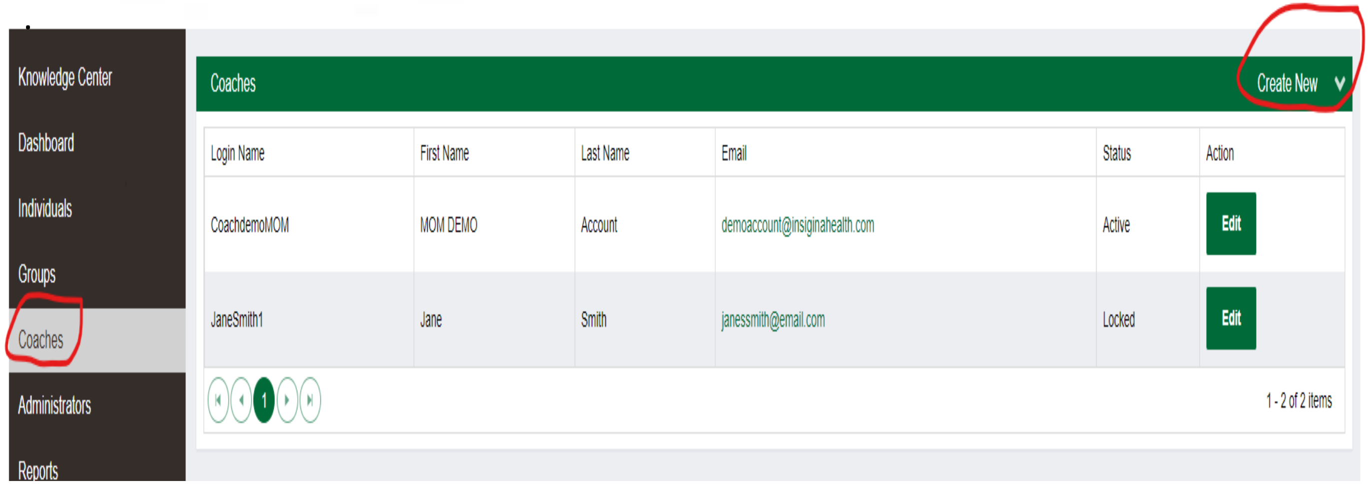


If your organization is configured for SSO integration or to access the PAM Application, this form may have additional settings. The manual does not cover these details. Insignia Health's implementation team will work with your organization's team to help define all required account settings.

Admin Tool Users

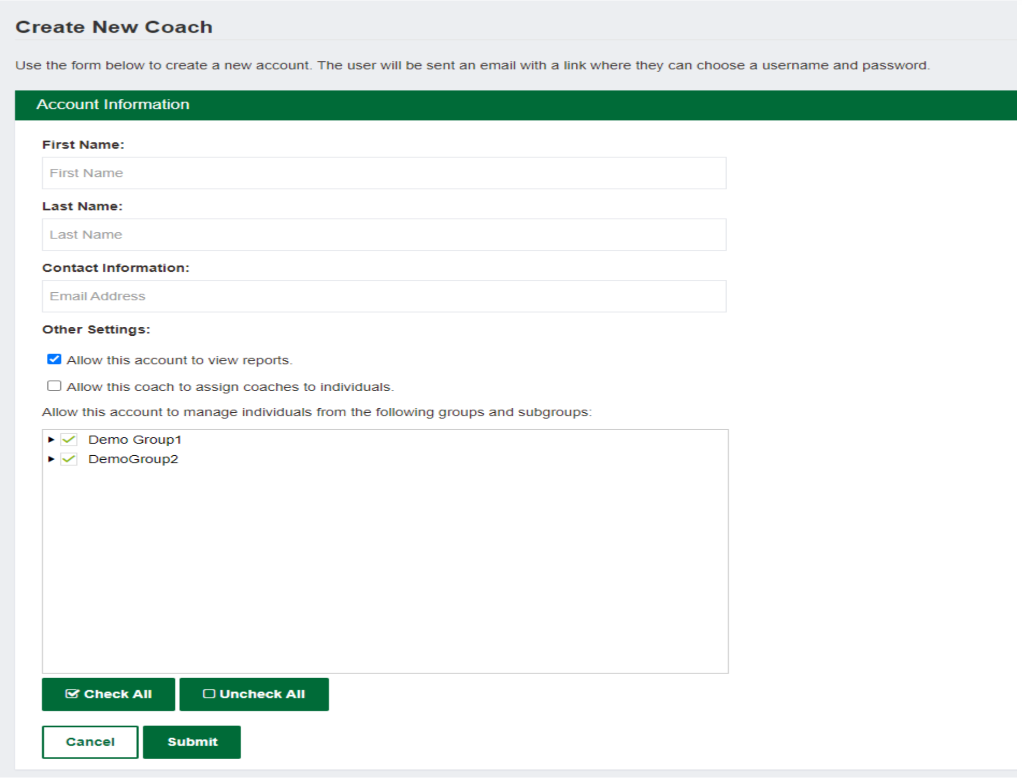
Create Coach

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



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.

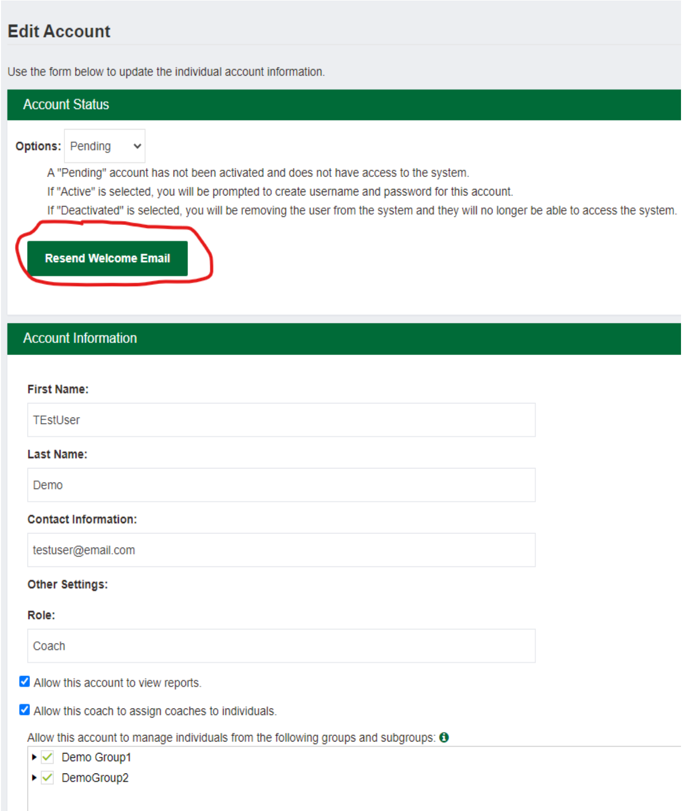


If your organization is configured for SSO integration or to access the PAM Application, this form may have additional settings. The manual does not cover these details. Insignia Health's implementation team will work with your organization's team to help define all required account settings.

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.



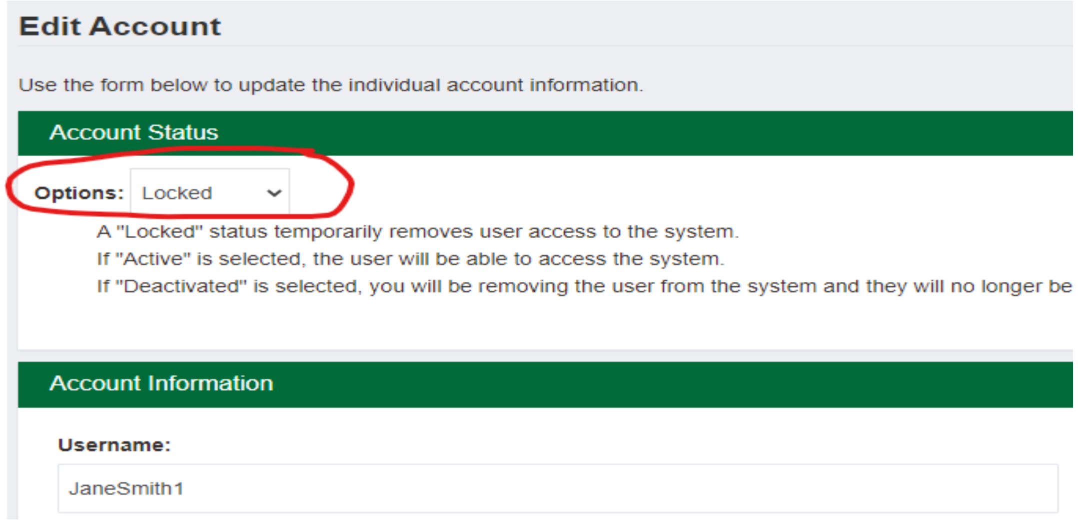
Activate Admin Tool User

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.

Admin Tool Users

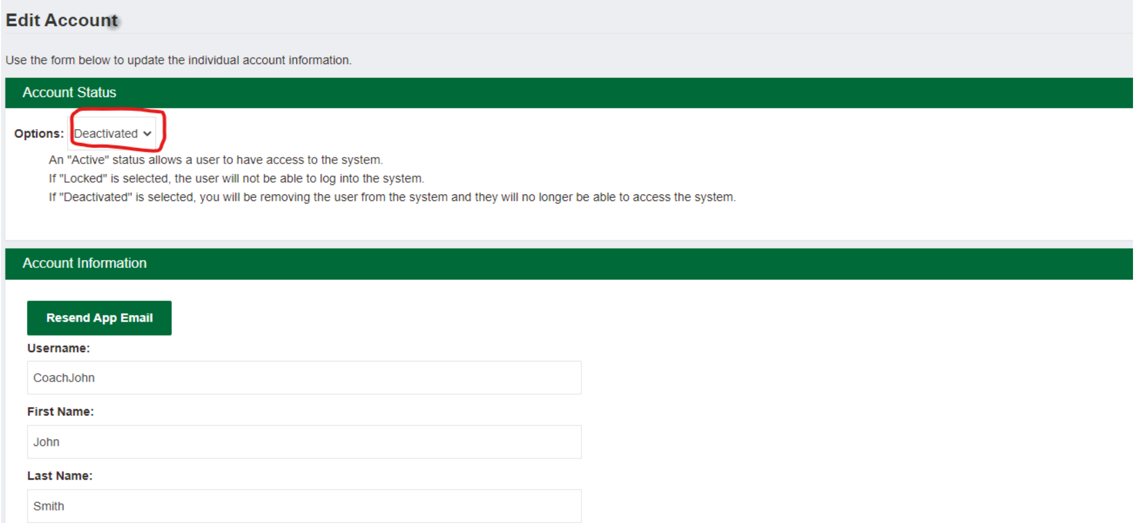
Lock/Unlock User Account

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.



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.



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.

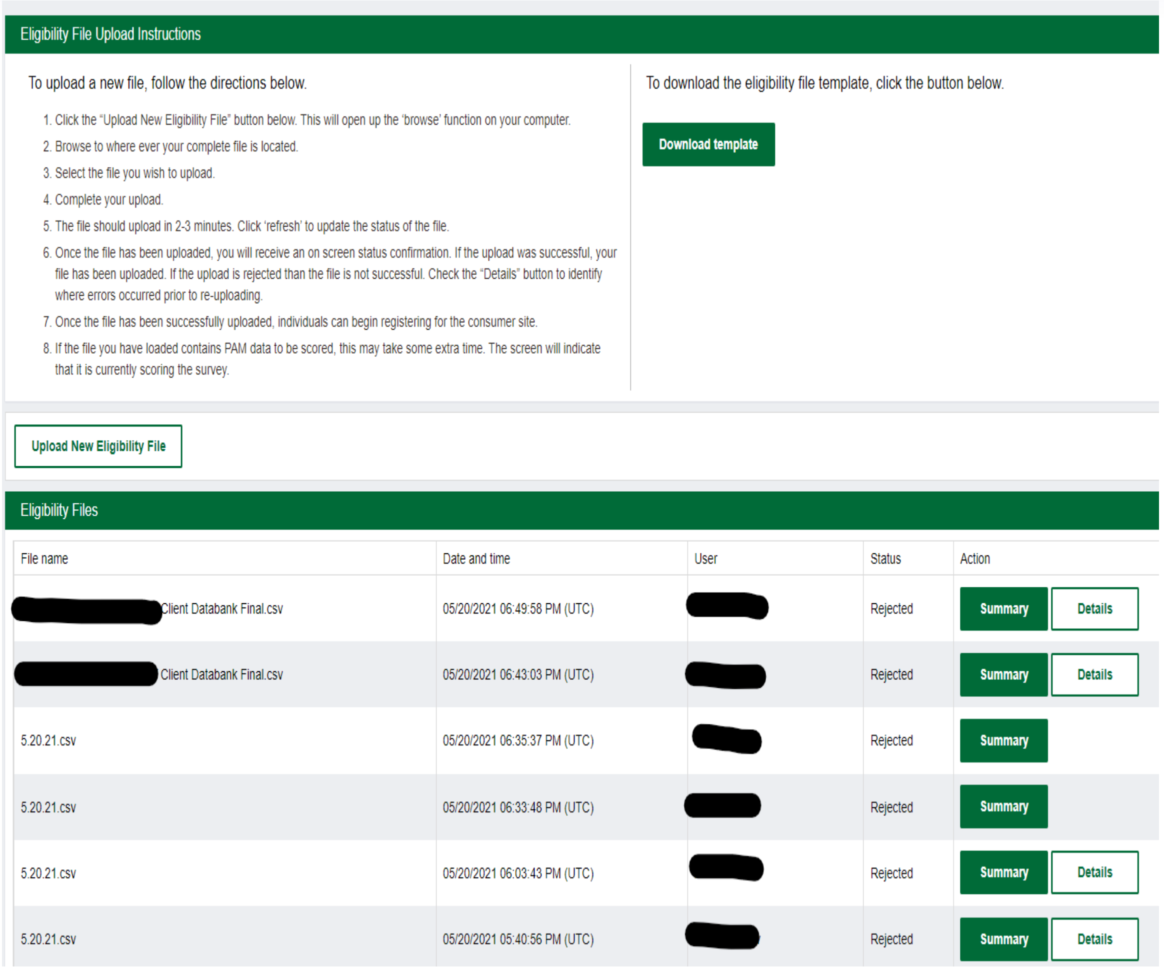
Client Administrators will also be able to upload PAM surveys for new or existing individuals by using the same upload feature. The file will have to include additional columns with survey data. Detailed instructions are provided within the template that can be downloaded from the Uploads page.

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.

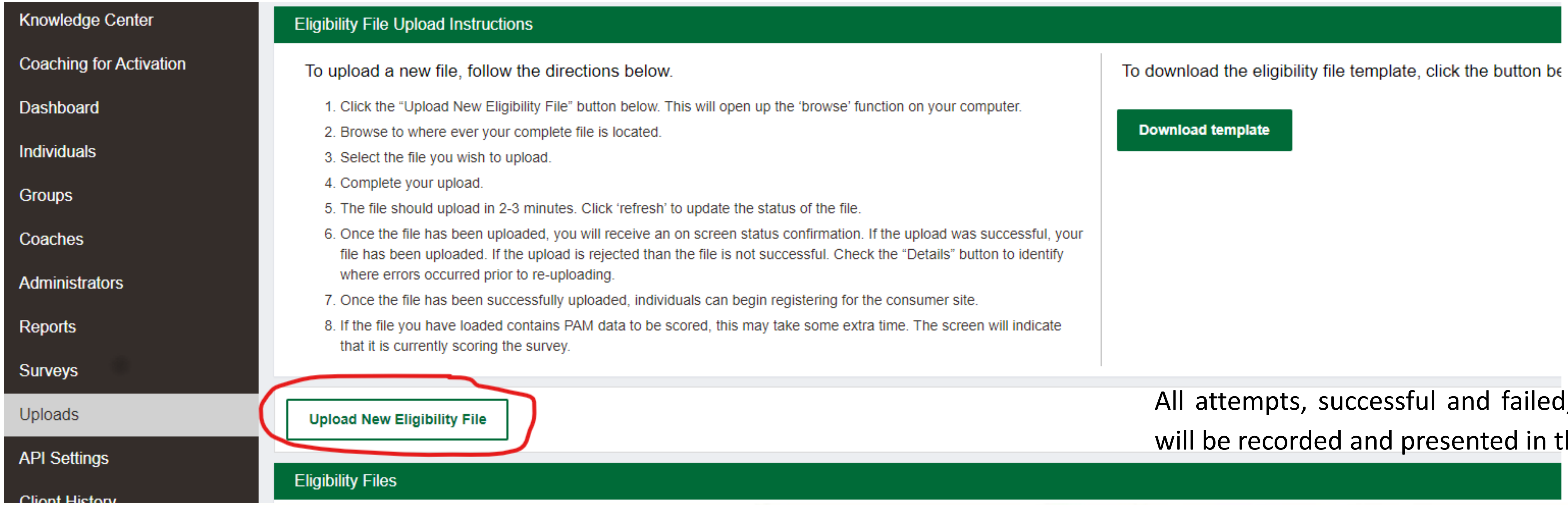


Uploads

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.



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

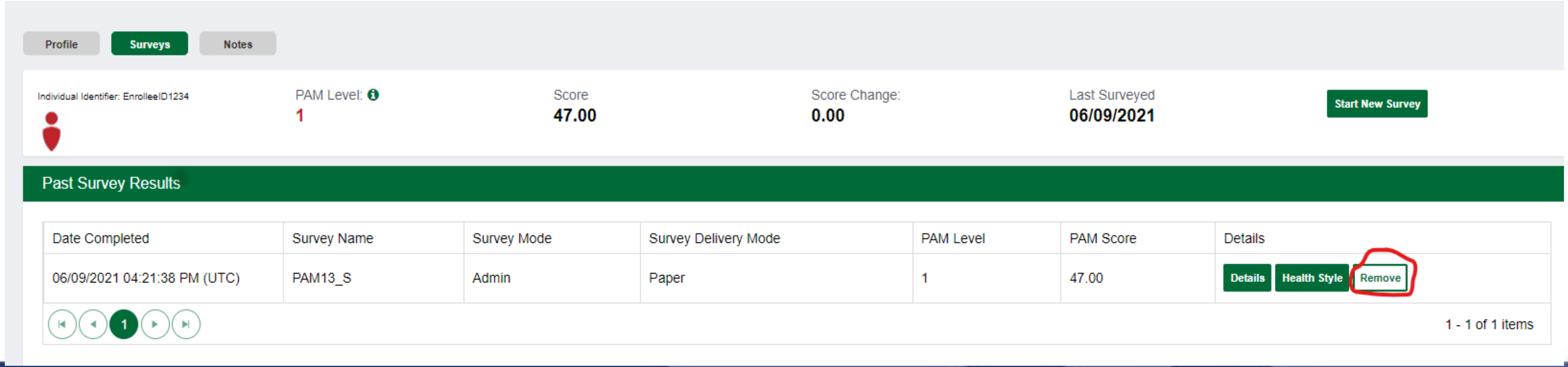
Cancel/Remove Survey

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.



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:

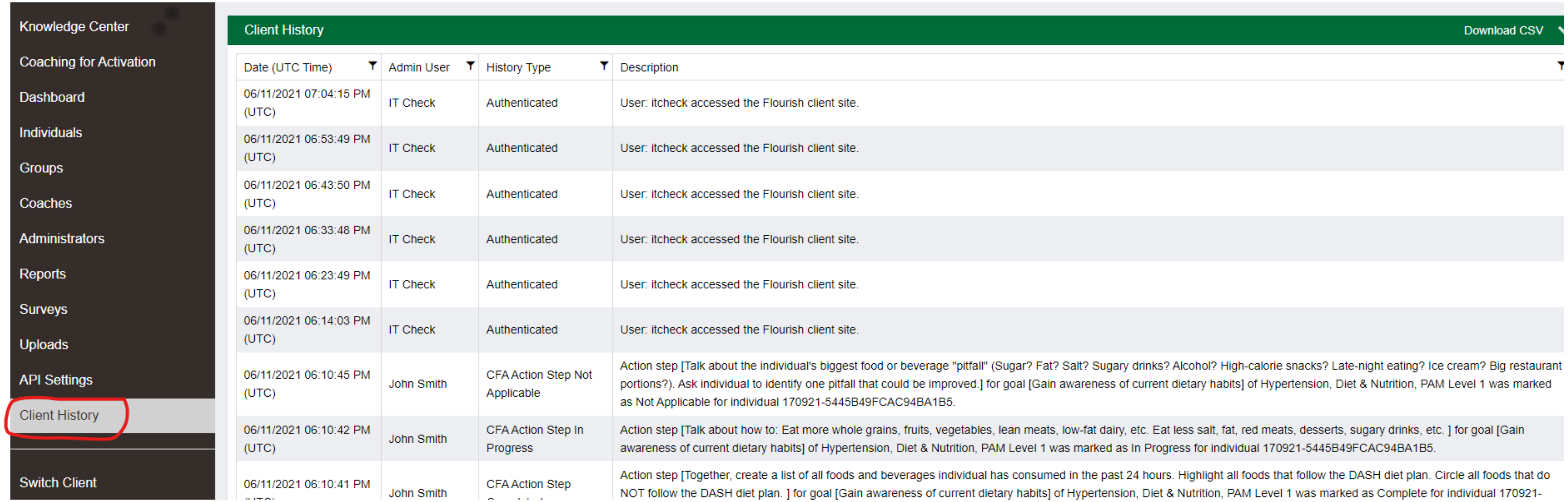
Which admin users have accessed the system and the time/date.

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.



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	John Smith	CFA Action Step	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-