flourish

Insignia Health

CLIENT AND GROUP ADMINISTRATOR MANUAL

FLOURISH ADMIN – MARCH 2020 RELEASE

Insignia Health®

TABLE OF CONTENTS

PURPOSE

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

Typical workflow scenarios are presented in the manual. Use the **index section** at the end of the document to quickly locate a specific topic.

YOUR ORGANIZATION SETTINGS

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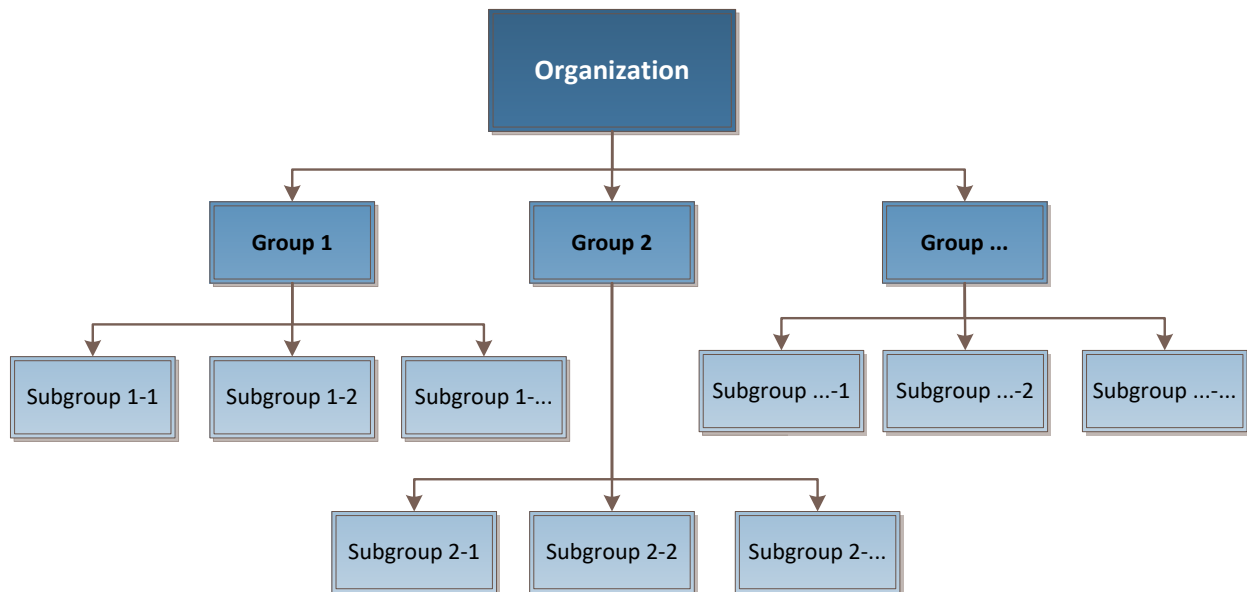

Figure 1. Organizational Structure

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.

Your organization will be setup with a desired date format based on the country location. All US based companies are setup with "mm/dd/yyyy" format by default. Most non-US companies are setup with "dd/mm/yyyy" default format. The selected format is applied across the site and can be changed (by request) by Insignia Health.

CLIENT ADMINISTRATOR AND GROUP ADMINISTRATOR SCENARIOS

SCENARIO #1: GET STARTED

To begin using Flourish Admin you will need to register as a Flourish Client Administrator.

1. Insignia Health Administrator will create an account for you.
2. You will receive a **Welcome email**.
3. Select the button within the email and complete your **Registration**.
4. View your **Dashboard**.
5. **Sign Out** and close your browser.

SCENARIO #2: CREATE OTHER FLOURISH ADMIN USERS FOR YOUR ORGANIZATION

1. To grant access to Flourish Admin to other members of your organization, you will need to create new accounts for them. In order to do so, you will need to collect the following information for each person:
    a. **User role:** Client Administrator, Client Administrator with no access to personal data, Group Administrator, or Coach;
    b. First Name;
    c. Last Name;
    d. Email Address;
    e. **For Group Administrators and Coaches:** Define which groups and subgroups they should have access to;
    f. **For Coaches:** Identify whether or not they will need to have access to reports;
    g. **For Coaches:** Determine whether or not coaches can assign themselves (or other coaches) to individuals.
    Note: Only Group Administrators will be able to create new Coaches
2. **Sign In** to Flourish Admin
3. Create new accounts for each **Client Administrator**. Please note that you can limit a Client Administrator's access to personal data. A user with limited access will not be able to see any Individual-specific information, including Individual Profiles, Individual Search, Surveys and some reports. A user with limited access will only be able to view aggregated reports, manage Groups and Subgroups, and create new Group Administrators and Coaches. Detailed information about this role is described in the **Create Client Administrator** section.
4. Create new accounts for each **Group Administrator**
5. Create new accounts for each **Coach**
6. The system will send a **Welcome email** to the owners of new accounts. They will need to **complete registration** by following the provided instructions.

SCENARIO #3: GENERATE REPORTS

To view a summary of your organization's data over a period of time and generate a report:

1. **Sign In** to the system.
2. Select **Reports** from the left side navigation bar.
3. Choose a report category that you would like to generate a report for:
    - **PAM Reports:** Reports on population PAM distribution, PAM changes, and other PAM-related reports;
    - **CFA Reports:** Reports on CFA usage; available only if your organization is licensed to use CFA;
    - **Registered Individuals Reports:** A complete list of registered individuals;
    - **Health Assessment Reports:** Reports related to Health Assessment surveys; available only if your organization is licensed to use HA surveys;

- **Challenge Reports:** Reports on usage of Flourish challenges by your population; available only if your organization is licensed to use a Flourish consumer site.
4. Choose a report within the selected category, select the appropriate parameters, and generate a report.
5. You can download and save the report as a PDF or CSV file to print immediately or reference in the future.

New reports will be added in the future. Please refer to the "Reports" section below for a complete list of report categories and reports.

FUNCTION DESCRIPTIONS

REGISTRATION

Registration is required to access Flourish Admin. Your Insignia Health Administrator will create an account for the first Client Administrator in your organization, which will trigger a Welcome email to your inbox. You may want to check your Spam or Junk folders before requesting for the email to be re-sent.   Other Client and Group Administrators can be created by Insignia Health or by any Client Administrator of your organization. The registration process will remain the same.
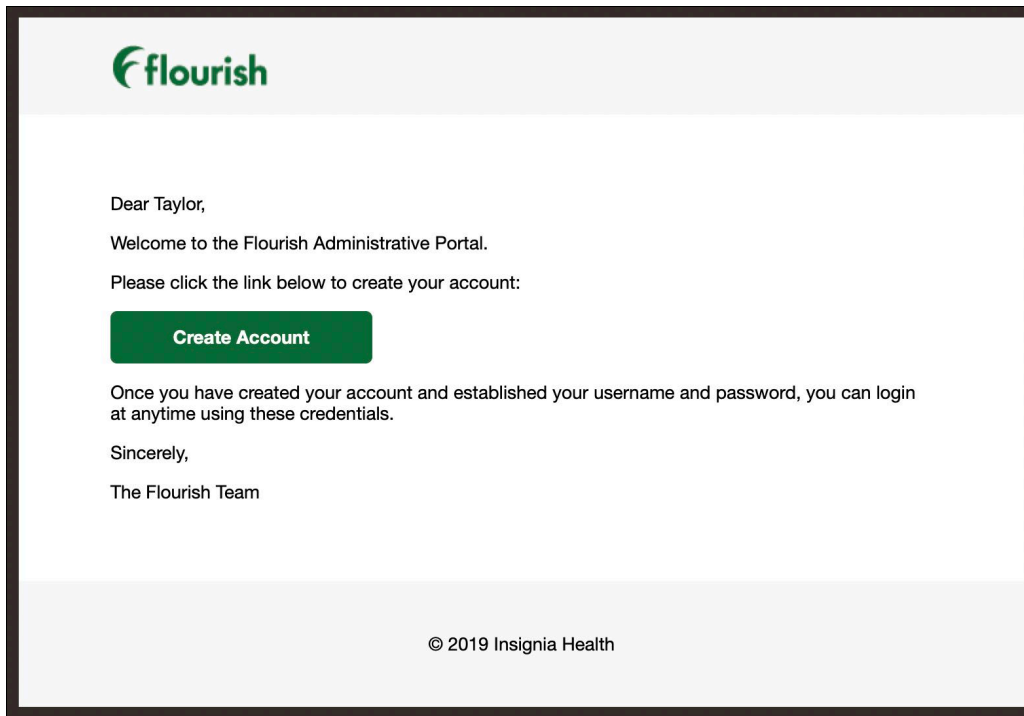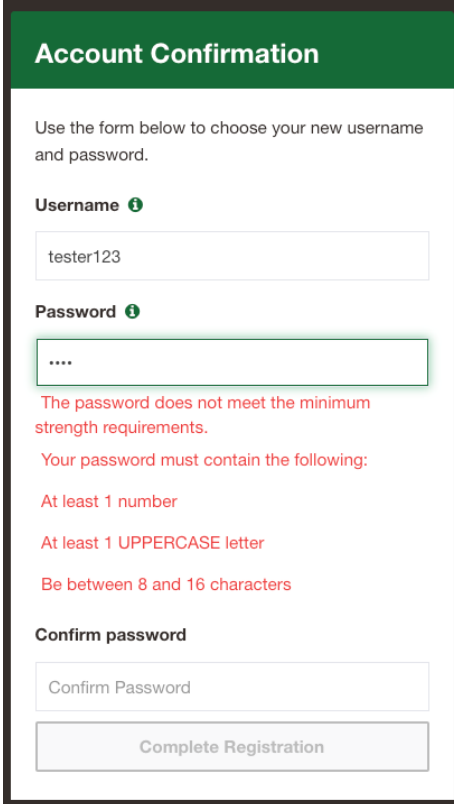

Figure 2. Welcome Email

To complete registration:

- Click the "Create Account" button in the Welcome email;
- Create a new username and password;
- Make note of your credentials in a confidential and secure place.

Your password should meet the following criteria:

- Contains at least one upper case letter;
- Contains at least one lower case letter;
- Contains at least one number; and
- Is between 8 and 16 characters long.

Figure 3. Complete Registration Form

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.
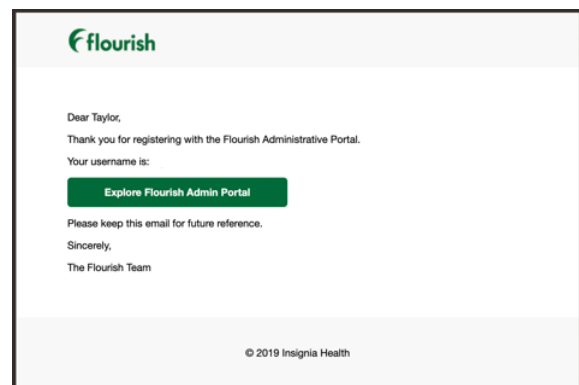

Figure 4. Confirmation Email

ACCESS THE SYSTEM

SIGN IN

Navigate to https://admin.insigniahealth.com. Please bookmark this site in your browser for future reference.

Note: If you are located in a different country than the US, you may need to contact your support at Insignia Health to get the appropriate URL. Insignia Health will host the Flourish platform in other countries to meet local requirements for storing personal data.

Enter your username and password, and then click the "Sign In" button.

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 or incorrectly answer the additional security after two more attempts, you will be locked out of Flourish Admin until the Insignia Health Support Team can assist you.
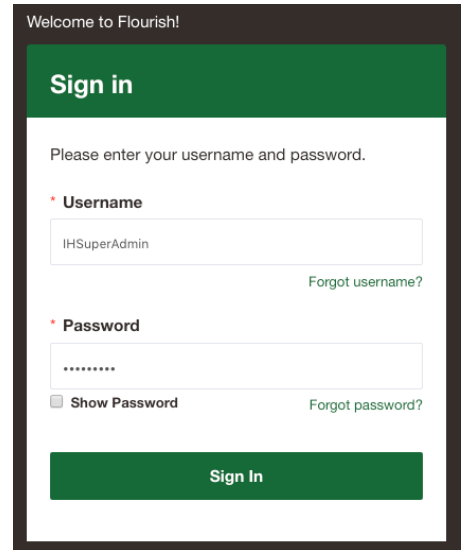

Figure 5. Sign In Screen

If your organization is configured to have user alerts turned on, you will see a modal window with the relevant text upon your first login. Here is an example of the user alert:
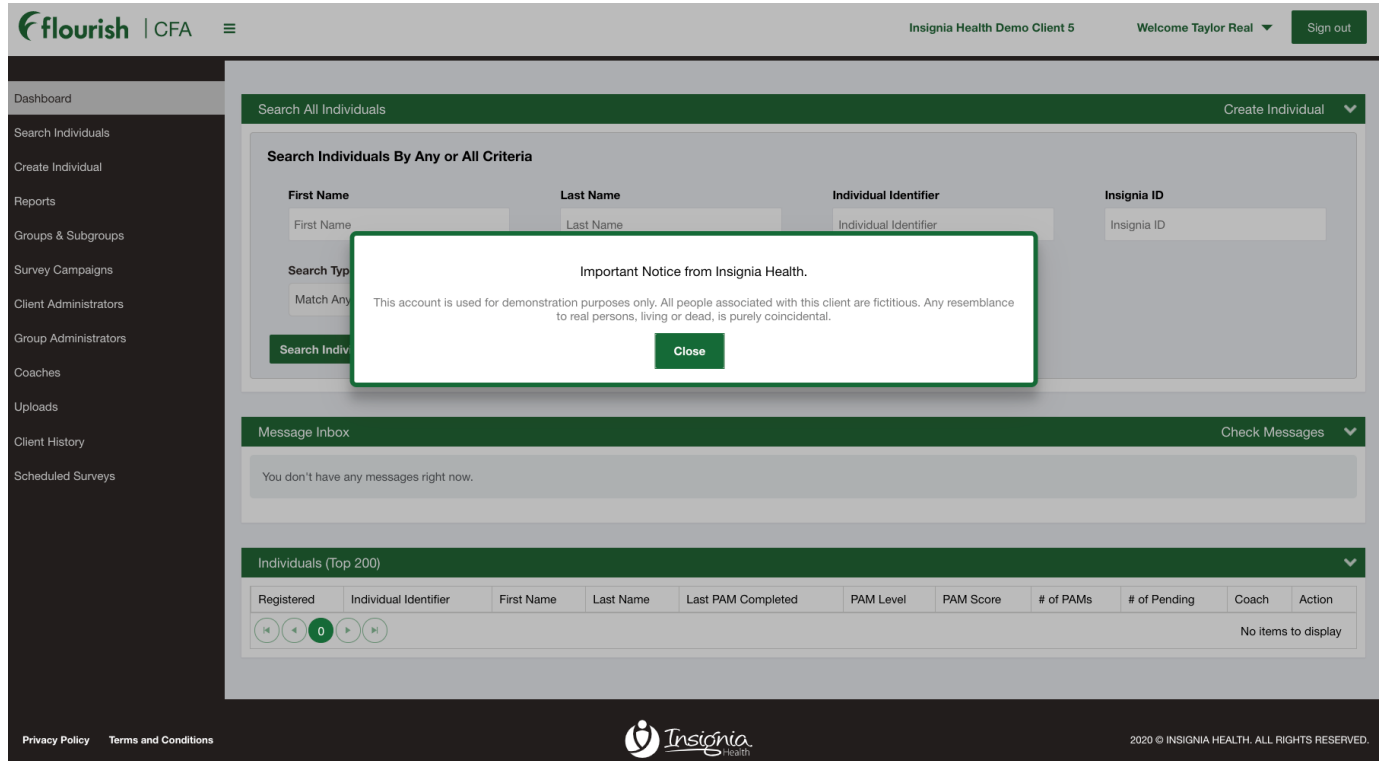

Figure 6. User Alert

User Alerts can be configured by Insignia Health (by request) and will be displayed to all your Flourish Admin users upon initial login.

FORGOT PASSWORD

If you forget your password, click the "Forgot password?" link on the Sign In page and enter your username into the form. After selecting the "Submit Username" button you will receive an email with a link to reset your password.

Figure 7. Retrieve Password Form

FORGOT USERNAME

If you forget your username, click the "Forgot username?" link on the Sign In page and enter your email address. After selecting the "Send Email" button you will receive an email with your username.

Figure 8. Retrieve Username Form

SIGN OUT

Sign out of Flourish Admin and securely end your session by selecting the "Sign Out" button in the top right corner of the screen. If you leave your browser open, your session will time out in 15 minutes and you will be signed out of the system.
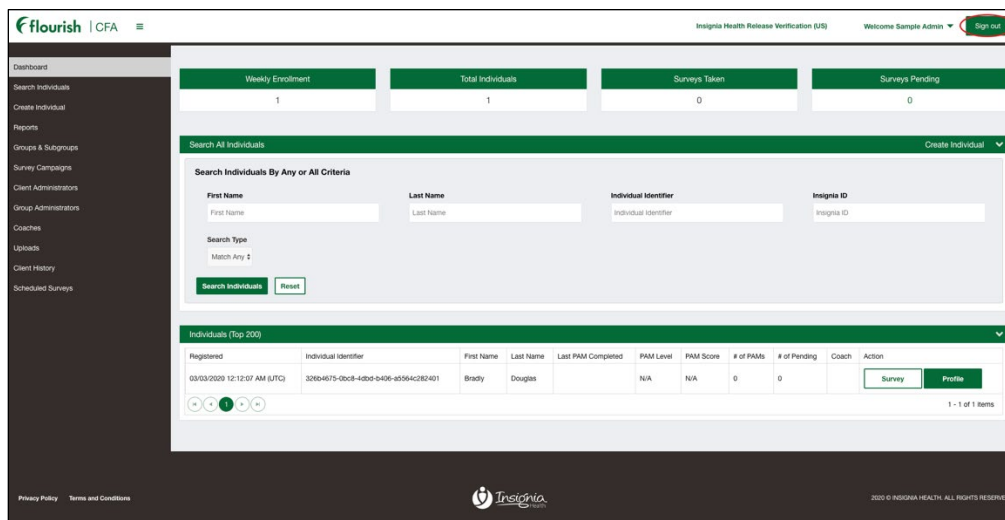
Figure 9. Sign Out of Flourish Admin

GENERAL FUNCTIONALITY

DASHBOARD

After signing into the system, you will see the Dashboard showing:

For Client Administrators:

A. Aggregated system usage data;

B. Search All Individuals section;

C. Messages Inbox – if your organization configured to have a consumer site with message capability;

D. Individuals recently added to the system within your organization, which may include ***some or all*** of the following data that are possible to display:

- o Date and Time of registration (UTC);
- o Individual ID;
- o First/Last Name:
- o Last PAM Completed date and time (in Coordinated Universal Time, or UTC);
- o PAM Level;
- o PAM Score;
- o # of PAMs completed;
- o # of Pending PAMs;
- o Coach or coaches assigned to the individual;
- o Outlier Flag (⚠), signifying an unusual PAM survey answer pattern.

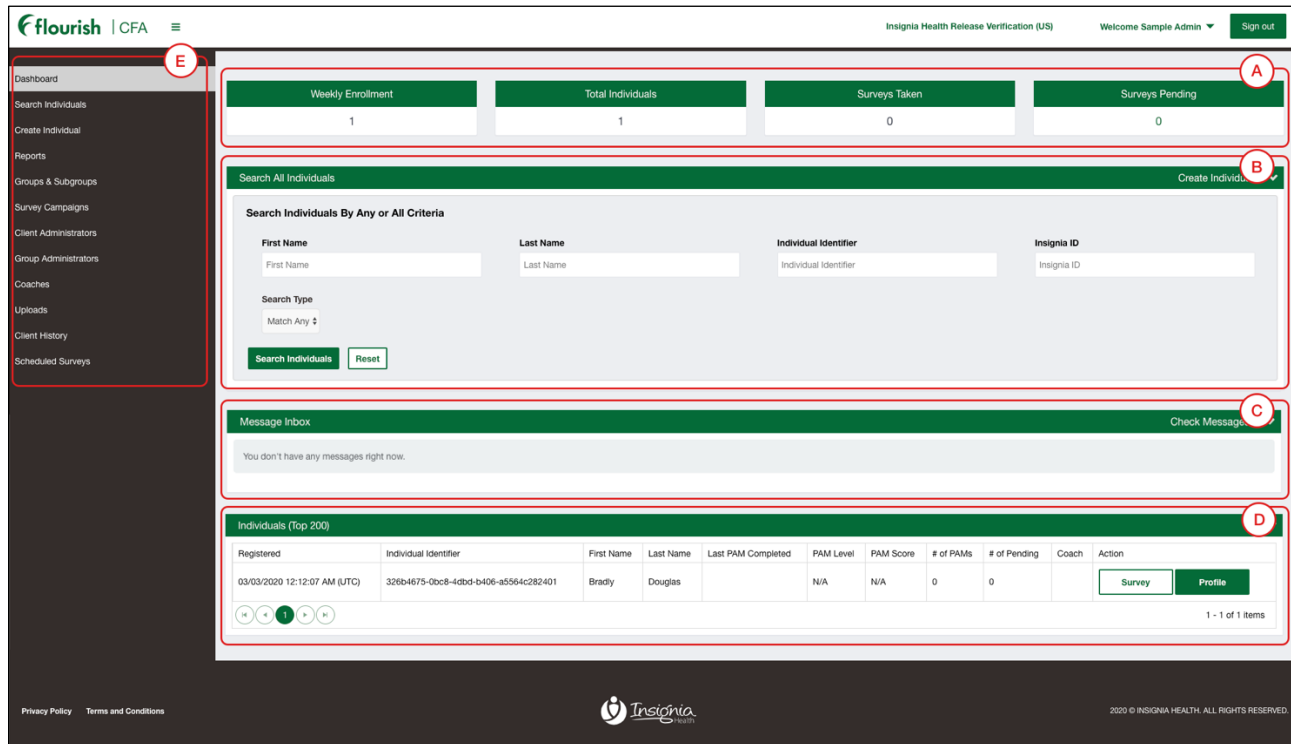E. Left-hand navigation menu that is accessible on all pages.

Figure 10. Client Administrator Dashboard View

For Client Administrators without access to personal data:

A. Aggregated system usage data;

B. Messages Inbox – if your organization is configured to have a Flourish consumer site with messaging capabilities;

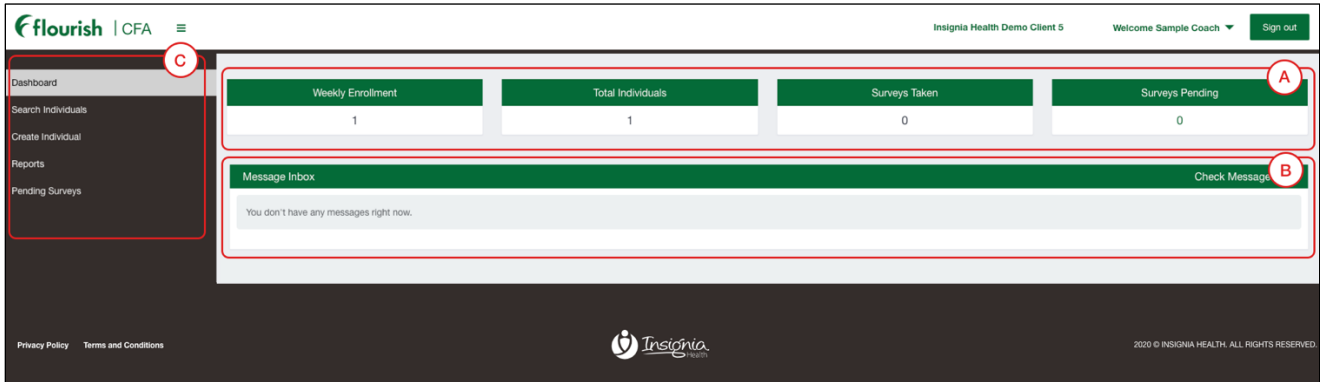C. Left-hand navigation menu that is accessible on all pages.

Figure 11. Client Administrator Dashboard View (Without Access to Personal Data)

For Group Administrators:

A. Search All Individuals section;

B. Messages Inbox – if your organization is configured to have a consumer site with message capability;

C. Individuals recently added to the system within your organization –data possible to display includes;

- o Date and Time of registration (UTC)
- o Individual ID
- o First and Last Name
- o Last PAM Completed date and time (UTC)
- o PAM Level
- o PAM Score
- o # of PAMs completed
- o # of Pending PAMs
- o Coach or Coaches assigned to the individual
- o Outlier Flag

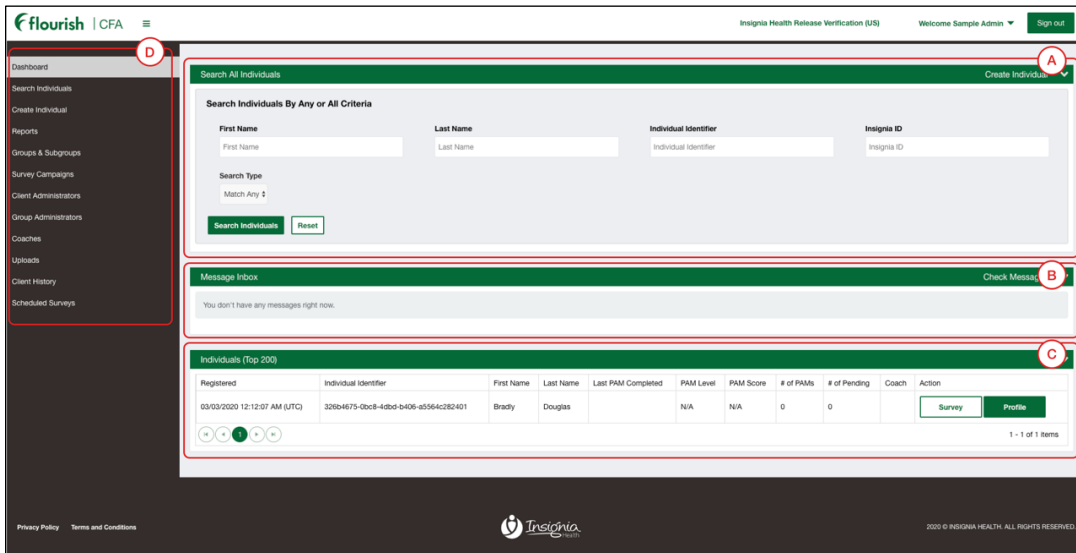D. Left-hand navigation menu that is accessible on all pages.

Figure 12. Group Administrator Dashboard View

NAVIGATING WITHIN FLOURISH ADMIN

To navigate within Flourish Admin, use the left-hand navigation menu. To edit your profile information and/or change your password, click on your name displayed on the right side of the top bar to view a drop-down menu.
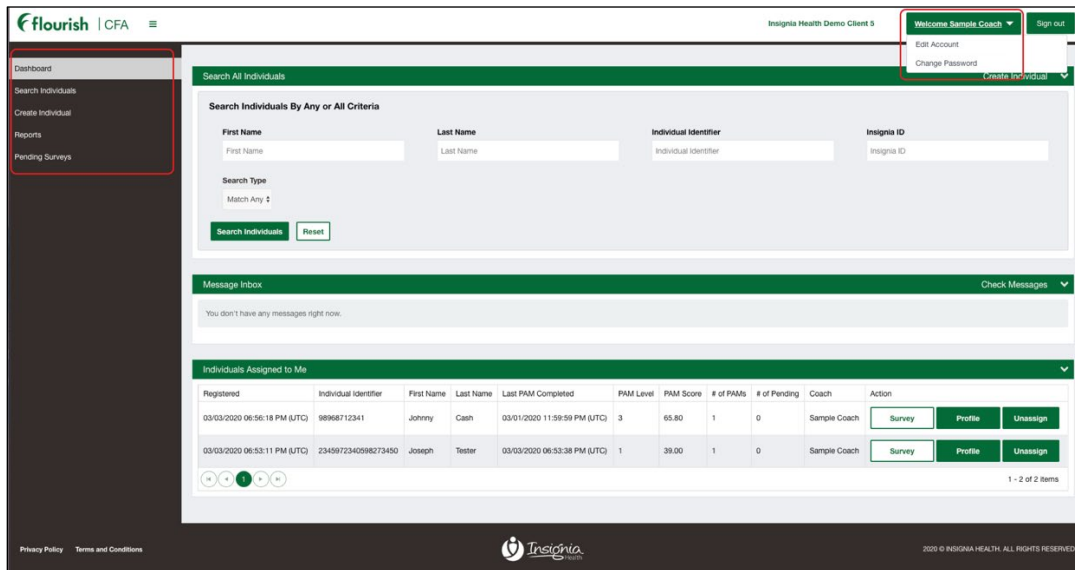

Figure 13. Navigation Options

EDIT ACCOUNT

You will be able to view and modify your account information, including first name, last name and email, by selecting "Edit Account" from the drop-down menu options that appear after clicking on your name at the top right. This page will also show your role that cannot be changed. Group Admins will see a list of groups and subgroups that they have access to. This list is not editable.

If you lock your account while you are logging in, you will need to ask another Client Administrator or Insignia Health Support to un-lock it.
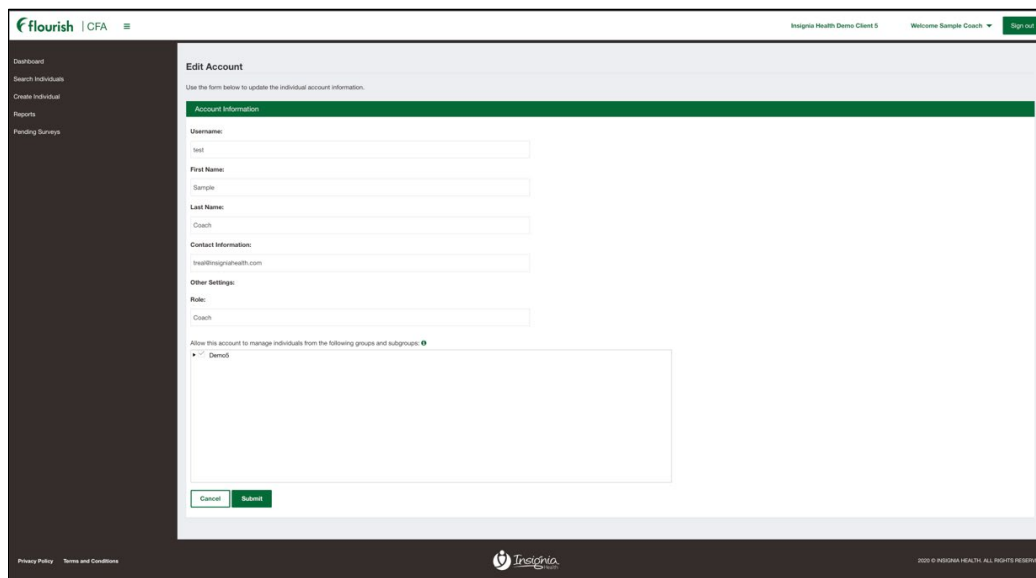

Figure 14. Edit Account

CHANGE PASSWORD

If you want to change your password, you will need to choose "Change Password" from the drop-down menu on the top.

Figure 15. Change Password

The system requires you to enter your current password. Then, enter the new password you want to use twice.

Ensure that your new password:
- Contains at least one upper case letter;
- Contains at least one lower case letter;
- Contains at least one number; and
- Is between 8 and 16 characters long.

PRIVACY POLICY & TERMS AND CONDITIONS

On the footer of all pages on the site are Insignia Health's Privacy Policy and Terms and Conditions. These documents define how Flourish Admin stores and uses individual information.

CREATING NEW FLOURISH ADMIN USERS

CREATE CLIENT ADMINISTRATOR

To create a new Client Administrator, select "Client Administrators" from the left-hand navigation menu. You will be presented with a list of all Client Administrators that are registered with your organization. The first time you view this page, there may be only one record for your account.

Figure 16. Client Administrators List

Select the "Create New" button on the top right of the Client Administrators bar and complete the form. You can limit a 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.

Figure 17.Create New Client Administrator

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 to help define all required account settings.

After submitting this form, the system will send a Welcome email to the identified email address. You may want to check your Spam or Junk folders before requesting for the email to be re-sent. 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 GROUP ADMINISTRATOR

To create a new Group Administrator, select "Group Administrators" from the left-hand 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.

Figure 18. Group Administrators List

Select the "Create New" link on the top right of the Group Administrators bar and complete the form. In addition to adding the Group Administrator's personal information, you will need to identify the groups and subgroups that this person will have access to. You can also determine whether or not the Group Administrator will have access to reports.

Figure 19. Create New Group Administrator Form

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 to help define all required account settings.

After submitting this form, the system will send a Welcome email to the identified email address. You may want to check your Spam or Junk folders before requesting for the email to be re-sent. 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 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	App Enabled	Admin ID	Status	Action	
UY94K429AY	Test	Samole	testing@testing.com	No		Pending	Edit	Activate
590JC2U12N	Coach	Coachee	coach@insigniahealth.com	No		Pending	Edit	Activate
L27XNCYCOY	Coach	Joe	coachjoe@insigniahealth.com	No		Pending	Edit	Activate

1 - 3 of 3 items

Figure 20. Coaches List

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 determine whether or not the Coach needs to have access to reports and if they need to be able to assign other Coaches to individuals.

Figure 21. Create New Coach Form

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 to help define all required account settings.

After submitting this form, the system will send a Welcome email to the identified email address. You may want to check your Spam or Junk folders before requesting for the email to be re-sent. 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 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.

Figure 22. Resend Welcome Email to Coach

ACTIVATE OTHER FLOURISH ADMIN USERS

Client and Group Administrators are able to activate other Flourish Admin users from their organization by selecting the "Activate" button next to a given user's name.

This function will initiate 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.

LOCK/UNLOCK USER ACCOUNT

If you need to temporarily close a user's access to Flourish Admin, 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 so, you will need to find the user's account profile on the list of Client Administrators or Coaches and select the "Edit User" button. When this user attempts to login to Flourish Admin, they will get an error message and will not be able to access the system. To re-provide access to the user, you will need to select the "Active" Account Status button on the user's account page.

DEACTIVATE USER

If you need to permanently cancel a user's access to Flourish Admin, you will need to change the user's account status to **Deactivated** on their Account Information page. A**ll 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.

MANAGE GROUPS AND 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.
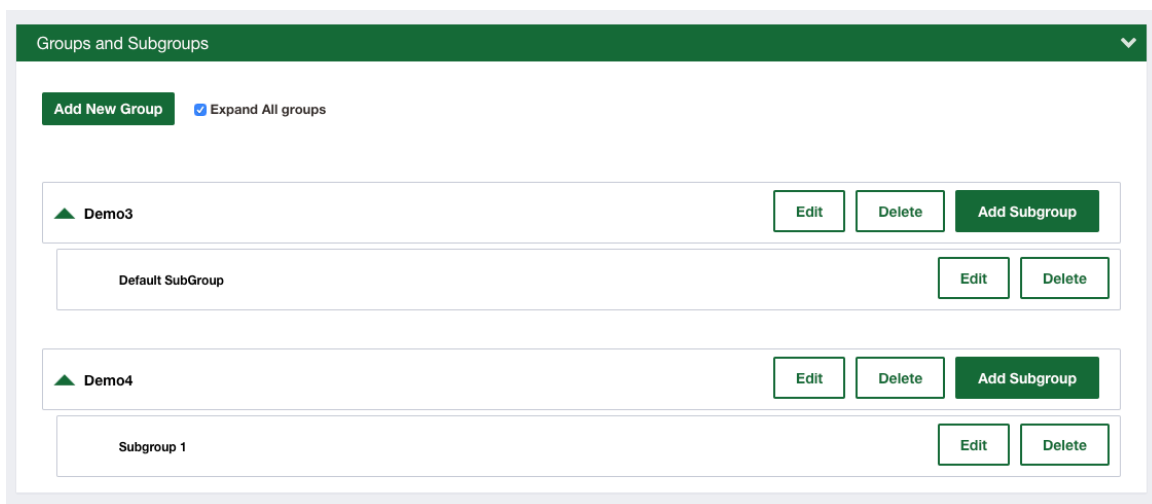

Figure 23. Groups and Subgroups

ADD NEW GROUP

To create a new group, you will need to click the "Add New Group" button on the top of the screen. You will be presented with a wizard for creating a group. If your organization is licensed for a Flourish consumer site, you will have four steps when creating a new group. Otherwise, you will need to complete only three steps.

The first step is to enter a group name. This group name must be unique within your organization. You will also need to create the first subgroup for the group at that point. Select the "Next" button to navigate to the next step.
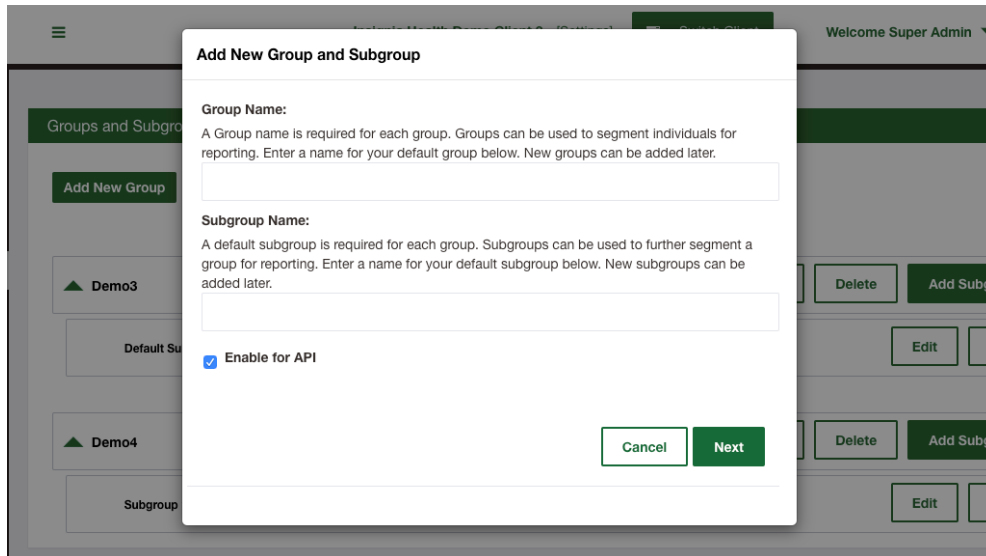
Figure 24. Add New Group - Step 1

Next, you will be prompted to create an access code for the group. Although the access code is optional, it's important to create one if your organization will be using Flourish consumer site with open registration. The new group or subgroup that the Client Administrator creates will be listed alphabetically on your Groups and Subgroups page.
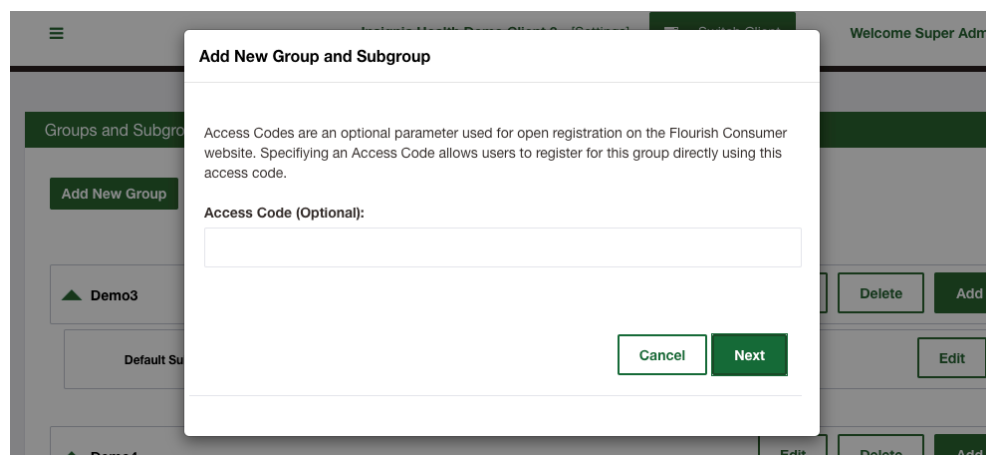
Figure 25. Add New Group - Step 2

Access codes will be used on the Flourish consumer site to verify their access to registration and put them into specified subgroup.

Provision Surveys

Next, you will be prompted to determine which surveys should be available to your new group. On the right side of the screen you will see all surveys that your organization can assign to your groups. You will need to move the surveys from the right column to the left column via the "drag-and-drop" gesture.
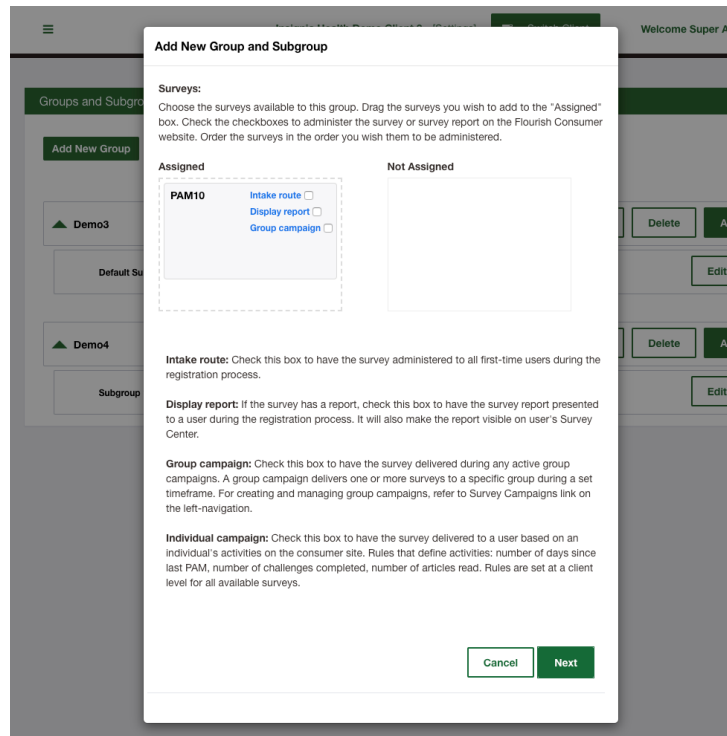
Figure 26. Add New Group - Step 3

For complete descriptions and considerations about which PAM survey(s) to choose for your groups, please consult your Account Manager. Available Survey Types include:

- PAM 6
- PAM 10
- Caregiver PAM 10
- Parent PAM 10
- PAM 10 on a Single Page (10_S)
- PAM 13
- Caregiver PAM 13
- Parent PAM 13
- PAM 13 on a Single Page (13_S)
- Health Assessment (HA) for Flourish Consumer sites only

For surveys selected for the group, you can set additional parameters.

- **Intake route:** Check this box to have the survey administered to all first-time individuals during the registration process.
- **Display report:** If the survey has a consumer-facing report, check this box to have the survey report presented to an individual during the registration process. It will also make the report visible on an individual's Survey Center. PAM and standard HA surveys have built-in reports, however custom surveys will not have reports unless that was specified and reports are built.
- **Group campaign:** Check this box to have the survey delivered during 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 the Survey Campaigns link on the left-navigation.

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

Provision Programs: For Flourish consumer site only

The next step will be presented only if you have a Flourish consumer site. It will display settings that you can use for assigning Flourish health programs to the new group. By default, all available health program that your organization has licensed will be assigned to the new group. You will then be able to remove them from the group by moving them to the right section of the screen.

To assign a particular health program to individuals of the group without the choice to opt out, select the check box for that health program. If the health program does *not* have a checkbox selected, individuals will have an option to choose this program during registration. Our recommendation is to use the default settings for health programs or contact Insignia Health for support if you would like to modify them.
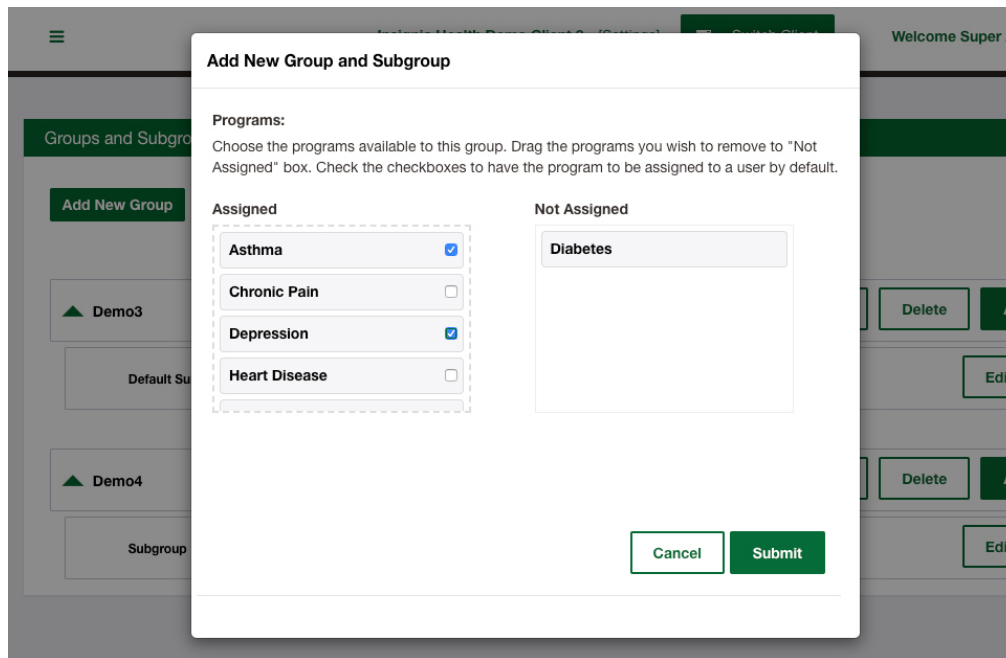
Figure 27. Add New Group - Step 4

Select the "Submit" button in the bottom right corner of the wizard to complete the new group creation.

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.

Figure 28. Edit Group

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" button next to the subgroup name that needs to be changed.

DELETE GROUP AND SUBGROUP

You can delete a group or subgroup by clicking the "Delete" button 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.

UPLOADS

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; and
- View the history of previously uploaded files.

Figure 29. Upload Eligibility File

DOWNLOAD TEMPLATE

You will need to download an EF template in order to upload an EF. The template includes instructions regarding how an EF should be completed as well as a detailed description of the fields that can be loaded into the system. The template also contains columns for PAM survey data.

UPLOAD NEW FILE

When your EF is ready, you can upload the file by selecting the "Upload New Eligibility File" button. You will be presented with a dialogue to select a CSV file, and once you do so the system will begin processing your data. 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.

HISTORY OF PREVIOUSLY UPLOADED FILES

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

INDIVIDUALS

As a Client Administrator, you will have access to the features described in the next two sections. However, they have been built primarily for use by Coaches. Client Administrators that were setup with no access to individual's personal information will not have access to these features.

CREATE INDIVIDUAL

Flourish Admin tool refers to your patients or members as "Individuals."

Client Administrators, Group Administrators and Coaches will be able to create new individuals by clicking on the "Create Individual" menu item on the left side navigation bar. The "Create Individual" function is also available on the Dashboard as well as on the Search Individuals page on the right side of the title bar for the list of individuals.
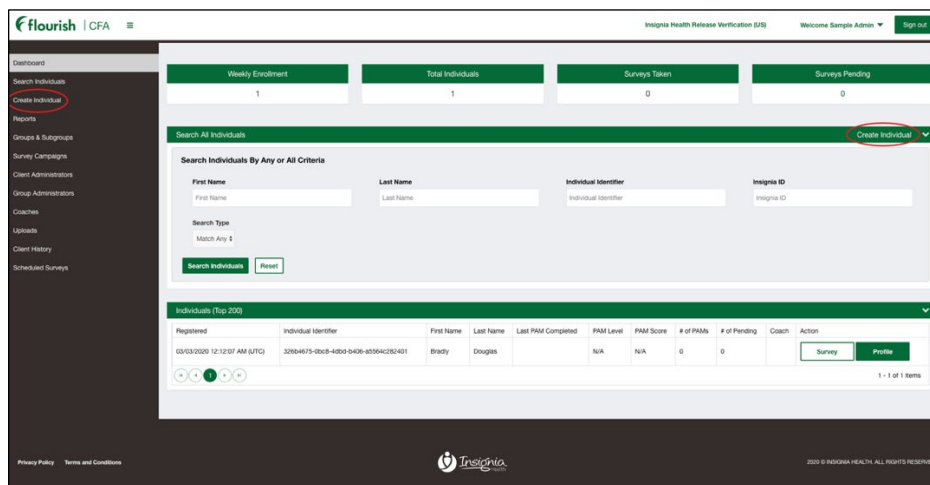

Figure 30. Create Individual Tab

To create a new individual, you will need complete the Create New Individual form by selecting the "Create Individual" link.

If your organization has only one group, the new individual will be automatically assigned to that group. If your organization has more than one group or subgroup, you will see these group and subgroups displayed. You will need to indicate the group and subgroup to which you would like to assign the new individual. Your organization will be able to configure what fields should be collected for your individuals. This can include a single field, like "Individual ID," or include the full set of demographic information. Additionally, the field labels, such as "Individual Identifier," can be modified to match your terminology. The instruction text below "Individual Identifier" can also be customized.

Figure 31. Create New Individual Form

Upon completion of the individual profile, you can select the "Create Individual" button to view the individual's profile, or you can select the "Create Individual and Administer Survey" button to initiate a new survey for that individual.

All information entered during creation of an individual can be modified later.

If you click "Create Individual" after completing Create New Individual form, you will be presented with the Individual Profile. The Individual Profile shows first name, last name and most recent PAM score and level across all Individual Profile tabs.

Figure 32. Individual Profile

Clicking on the PAM level on the Individual Profile header will bring up a PAM Recommendations window that contains a short description of characteristics for that individual. This information is specific to the PAM level and will be accessible on all Individual Profile pages.
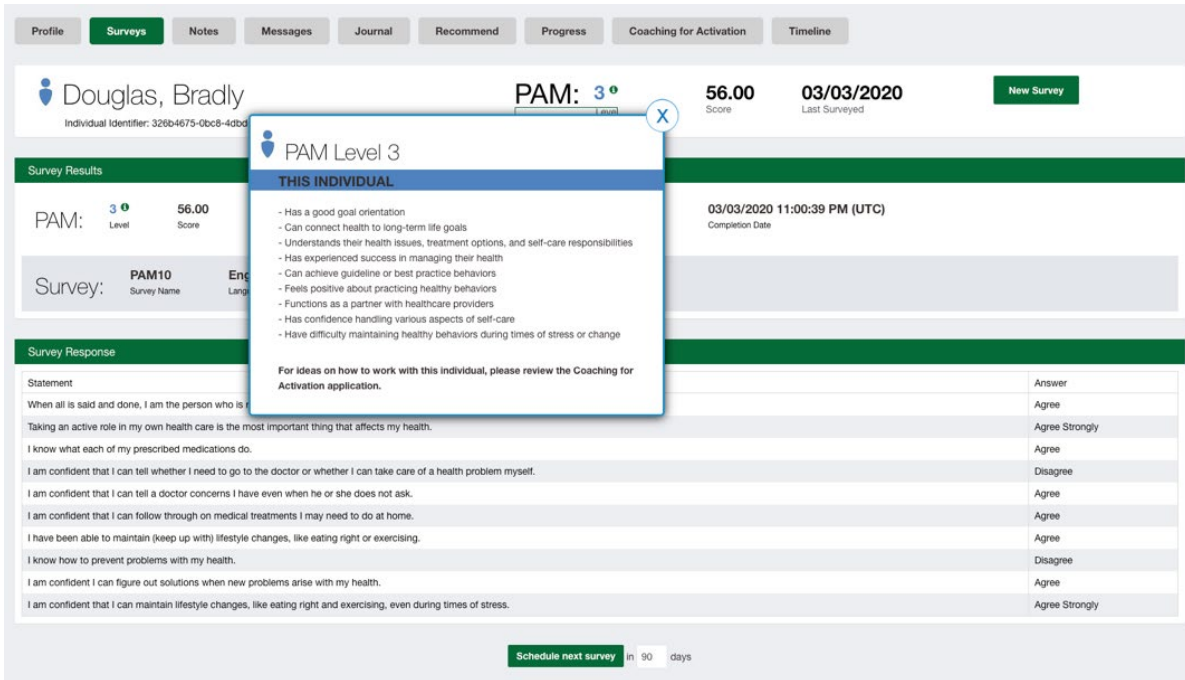
Figure 33. PAM Recommendation

"ACTIVELY COACHING" RELATIONSHIP

An Individual created by the Client Administrator or Group Administrator will not be assigned to any Coaches. Their Coach Status will be displayed as *Unassigned*. Coaches can assign individuals to themselves when viewing the individual profile. Client Administrators and Group Administrators can assign individuals to Coaches by selecting a coach name from the drop down list on the individual's profile. Coaches that are already assigned to the individual will be displayed on the individual profile in the Current Coaches section. Client Admins also have the ability to un-assigned Coaches from individuals.
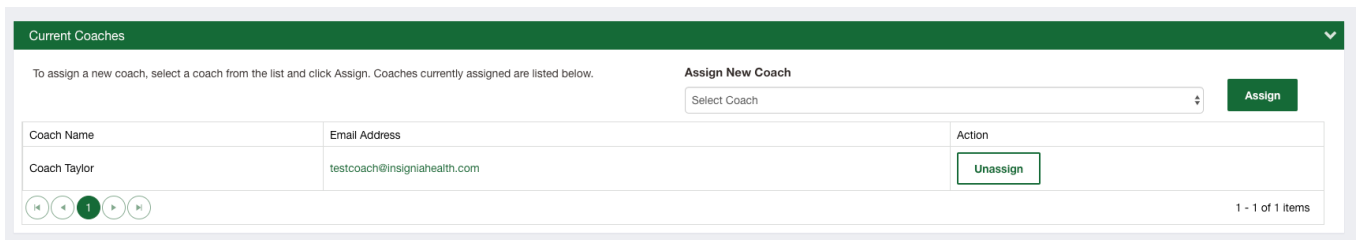
Figure 34. Assign/Unassign A Coach

SEARCH FOR AN INDIVIDUAL

To look up an individual previously entered into the system, Client Admins will have several tools:

-   View the list of Individuals on your Dashboard;
-   Search box on the Dashboard that searches entered values in all individual profile fields; and
-   Search accessible from the left side navigation bar.

SEARCH BOX

Search box allows you to search individuals by their first name, last name, Individual ID, and Insignia ID. You can choose to search by matching any field or by matching all fields. Examples:

- If you enter 'Mary' in the First Name search field you will see all individuals with the first name Mary.
- If you enter '78' in the Individual ID field, all individuals that have '78' as part of their Individual ID will show up in your search result.
- If you enter 'Mary' in the First Name search field and '78' in the Individual ID field and choose Match Any option, your search result will include all individuals that have the name Mary or '78' as part of their Individual ID.
- If you enter 'Mary' in the First Name search field and '78' in the Individual ID field and choose Match All option, your search result will include all individuals that have the name Mary and '78' as part of their Individual ID.

Figure 35. Search All Individuals

After submitting your search request, you will be transferred to the Search Individuals page which displays search results. See the section below to read about Search Results.

By clicking "Search Individual" on the left side menu, you will be presented with a form that is similar to the Search box. You will be transferred to this page from the Dashboard after submitting your search request.

Figure 36. Search Individuals Screen

In addition to the Search functionality, you will be able to filter your results by any shown column. To filter, click on the filter icon next to the appropriate column.

SEARCH RESULTS

Your search result will be shown in a grid with detailed individual information. You can go to an individual's profile from there or start a new survey for the selected individual.

Figure 37. Individual Search Results

INDIVIDUAL PROFILE

To view an Individual Profile, click the "Profile" button for the selected Individual on your Dashboard or via the Search Result list. The Profile page will show the individual's first name, last name, Individual Identifier, most recent PAM level and PAM score, and the date the most recent PAM survey was completed. If applicable, the profile will also indicate if the most recent PAM survey was flagged as an outlier. The Profile page also contains tabs to navigate to different sections of the profile. The Individual Profile only displays product features that your organization has licensed. This may include some or all of the following:

- **Profile:** This tab includes individual demographics and only shows fields that your organization was set up to collect from a new individual. Individual Identifier may have a different label for your organization.
- Profile tab is also a place to take these actions:
    - Edit individual data;
    - Assign and un-assign Coaches to an individual;
    - Take a new survey – available on all tabs;
    - View PAM recommendations – available on all tabs;
    - Restore access by resending a Welcome email – this will be available only if your organization has licensed the consumer-facing Flourish site and the individual has an email address.
- **Surveys:** This tab shows previously taken survey results.
- **Notes:** This tab allows Coaches to take notes on an individual and review those notes. Notes are auto-saved every 5 seconds. This allows notes to be taken while on the phone with a patient, and even if a session timeout occurs, no data will be lost.

Tabs only available if your organization has licensed a Flourish consumer site:

- **Messages:** This tab displays all messages sent to the individual. Additionally, this is where Coaches can send messages to the individual.
- **Journal:** This tab displays to the coach an individual's journal entries.
- **Recommend:** This tab allows a coach to recommend content to an individual.
- **Progress:** This tab displays progress that an individual has made within Flourish.

Tabs only available if your organization has licensed integrated CFA:

- **Coaching for Activation:** This tab displays CFA content and has functionality for tracking coaching actions within CFA;
- **Timeline:** This tab shows all CFA activities associated with an individual.

Surveys tab will display an individual's full history of taken surveys, including which method was used to submit past surveys (Survey Delivery Mode), how they were entered into the system (Survey Mode) and the responses. From the survey tab, Client and Group Administrators can also schedule a future survey for the individual or take a new survey.
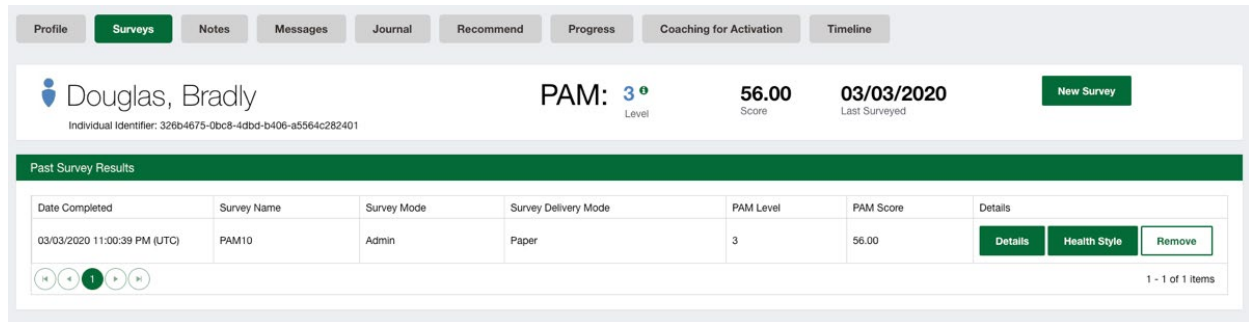
Figure 38. Individual Surveys Screen

You can add and review notes on an individual. Coaches can use this feature to record what was discussed as well as follow up items. Notes can be exported as a PDF file to be stored in an alternate system used by your organization.
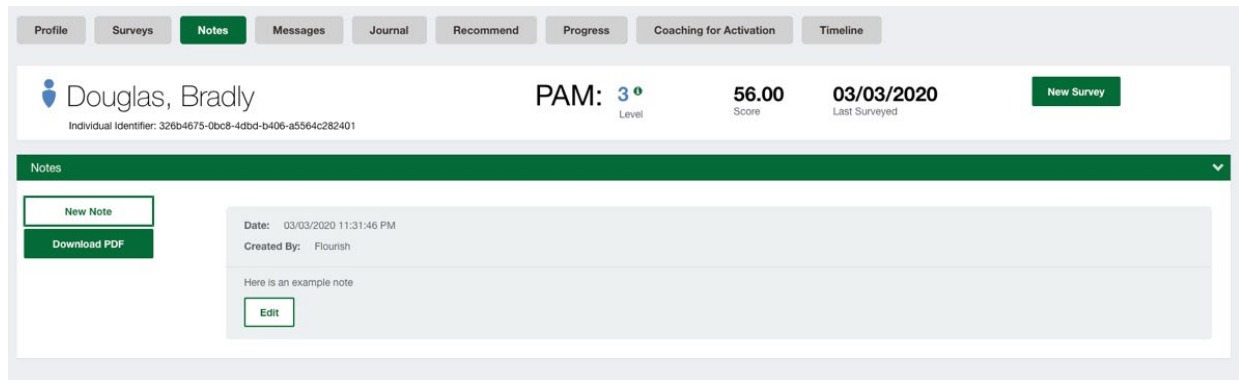
The system allows you to review and send messages to individuals. The individual can reply to messages that a Coach has sent them, but the individual themselves cannot initiate new messages. Additionally, all system-generated messages to an individual are stored here as well. Messages can be exported as a PDF file to be stored elsewhere.

This feature will be available only if your organization is set up to have a Flourish consumer site.

Figure 40. Messages

You can review an individual's journal entries that were entered on the Flourish consumer site. Journal entries can also be exported as a PDF file to be stored elsewhere.

This feature will be available only if your organization is setup to have a Flourish consumer site.

Figure 41. Journal Entries

Client Administrators, Group Administrators or Coaches can recommend Flourish content, articles, and videos to individuals. You can preview the content and then recommend it. Once the individual has reviewed the content, the content will be marked as "viewed."

On the Flourish consumer site, recommended content is designated with a star badge. An individual within consumer site will also receive a notification message in their Message Center Inbox informing them of the recommendation that also provides them with a direct link to the content.

This feature will be available only if your organization is set up to have a Flourish consumer site.
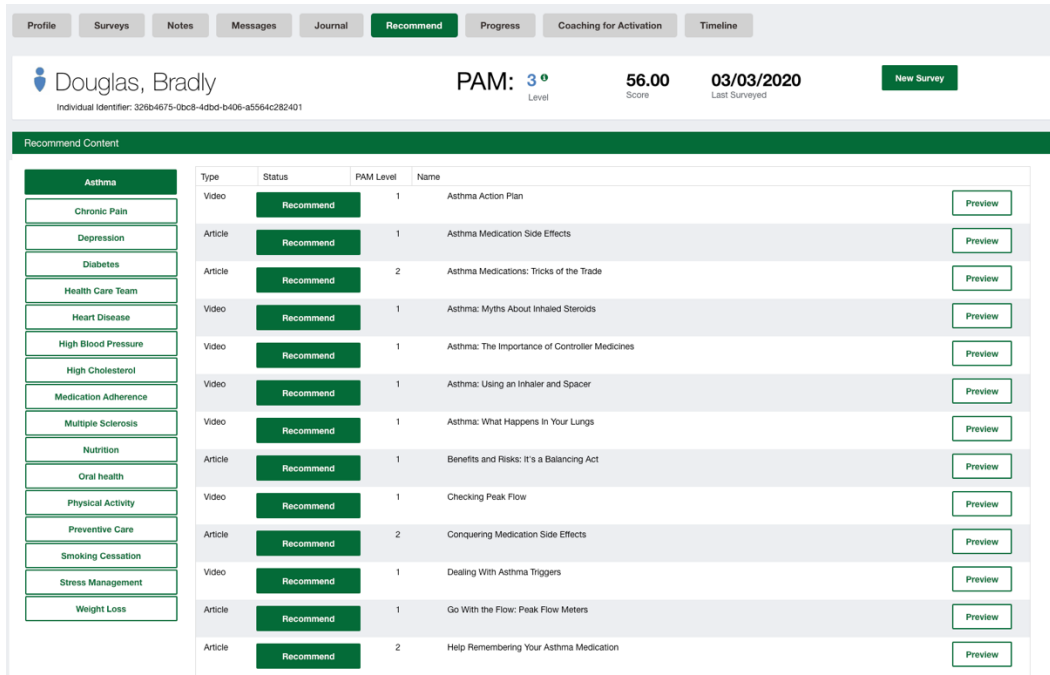
Figure 42. Recommend Content

You can review an individual's progress within the Flourish Challenge programs. You can see challenges that are in progress, completed challenges, tracker data entries and individual article and video completions.
This feature will be available only if your organization is set up to have a Flourish consumer site.

INSIGNIA ID

The system will automatically generate a unique identifier for each Individual and display it on the Individual's profile. You can use it as a reference for this person if all other fields are left blank.

INDIVIDUAL INFORMATION

To change any personal information or change an individual's group and subgroup, click the "Edit Profile" button on the Individual Profile.
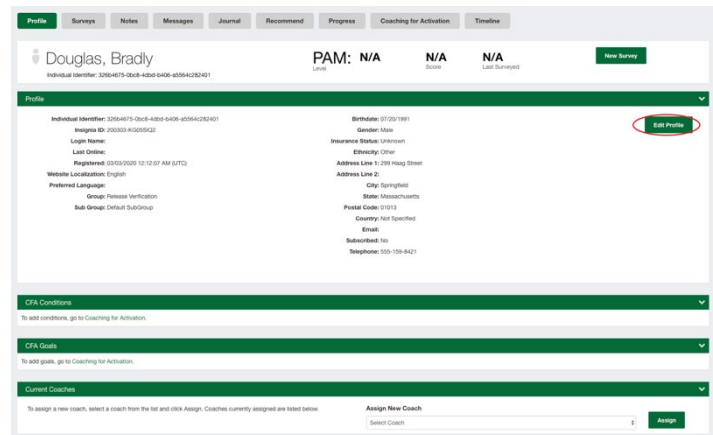
Figure 43. Edit Profile

Note that if your organization does not have multiple groups and subgroups, you will not see this field on the Edit Individual Details page.

Figure 44. Edit Individual Details

ASSIGNING COACHES

Client Admins will be able to assign and un-assign Coaches to an individual on the Individual Profile page. On the section "Assign a Coach" there will be a drop-down list of all Coaches that have access to this individual's profile. You can select a Coach from the list and click the "Assign Coach" button. It will create an "Actively Coaching" relationship between the individual and the Coach.

All Coaches assigned to the individual will be shown on the individual profile under the "Current Coaches" section. Client Administrator can remove them from that list one by one by clicking the "Unassign" button for the selected Coach.

Figure 45. Assign/Unassign a Coach

PAST SURVEY RESULTS

The Individual Profile gives you information about all surveys taken by the individual and displays:

- Date Completed;
- Survey type (Survey Name);
- How the survey was entered to the system (Survey Mode);
- How the survey was administered (Survey Delivery Mode);
- PAM results (PAM Level and PAM Score) – only for PAM surveys;
- Individual responses for each survey.

Figure 46. Past Survey Results

To view individual responses for the previously taken survey, click the "Details" button next to the appropriate survey from the Survey History table.

VIEW SURVEY RESPONSES

The Survey Results screen shows details about the survey and the individual's responses to the survey, including a list of questions/statements along with their responses. The Survey Results screen also displays who entered the survey. The enterer can be different from the coach. It can be the person that typed the paper surveys into Flourish Admin or "System" if the survey was submitted by the API or batch upload process.

Figure 47. Survey Responses

SURVEYS

ADMINISTER SURVEY

Administering a new PAM or other survey can be initiated at several points:
- from the Create Individual screen;
- from the Individual Profile header displayed on all profile tabs;
- from the list of recently created individuals on the dashboard;
- from the list of individuals displayed in a search result.

Figure 48. Create New Individual

Figure 49. Administer a New Survey from the Individuals (Top 200) List

Figure 50. Administer a New Survey From the Profile Section

Figure 51. Administer a New Survey from the Search Results List

To input a survey, first identify how the survey is taken (Survey Mode), survey type from the drop-down list, what language it was taken in, and the date of survey administration.
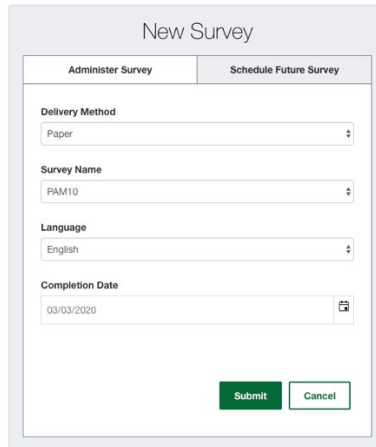

Figure 52. New Survey Administration

If you are entering a survey that has been previously taken on paper:

- Ensure the Delivery Method is set to "Paper";
- Select a Survey Name from the drop-down menu;
- Select a Language the survey is taken in;
- Choose the completion date to indicate when this survey was administered;
- Click the "Take a Survey Now" button.

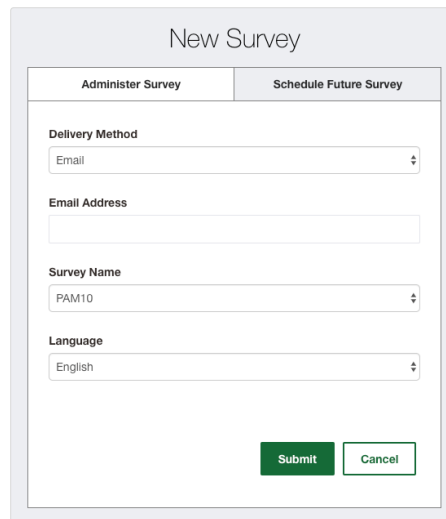If you are administering a survey by phone:

- Set the Delivery Method to "Phone";
- Select a Survey Name from the drop-down menu;
- Select a Language the survey is taken in;
- Completion date will automatically be set to the current day;
- Click the "Take a Survey Now" button.

If you are administering a survey in person:

- Set the Delivery Method to "In Person";
- Select a Survey Name from the drop-down menu;
- Select a Language the survey is taken in;
- Completion date will automatically be set to the current day;
- Click the "Take a Survey Now" button.

If you would like to send a survey to a person by email:

- Set the Delivery Method to "Email" - the form will refresh and require that the email address of the individual be entered;
- Enter the email address – this field will be prefilled by person's email if it stored in the profile, otherwise the field will be blank;
- Select a Survey Name from the drop-down menu;
- Select a Language for the survey;
- Click the "Take a Survey Now" button.

Figure 53. Administering/Sending a New Survey by Email

If the individual has an email address in the profile and would prefer to use an alternate, you can overwrite the person's email with a new email address. Any email entered on this form will not be retained in the individual's profile. Clicking on the "Take a Survey Now" button will generate an email to the individual and create a pending survey. The individual will receive an email from the Flourish system telling them that they have a new survey.
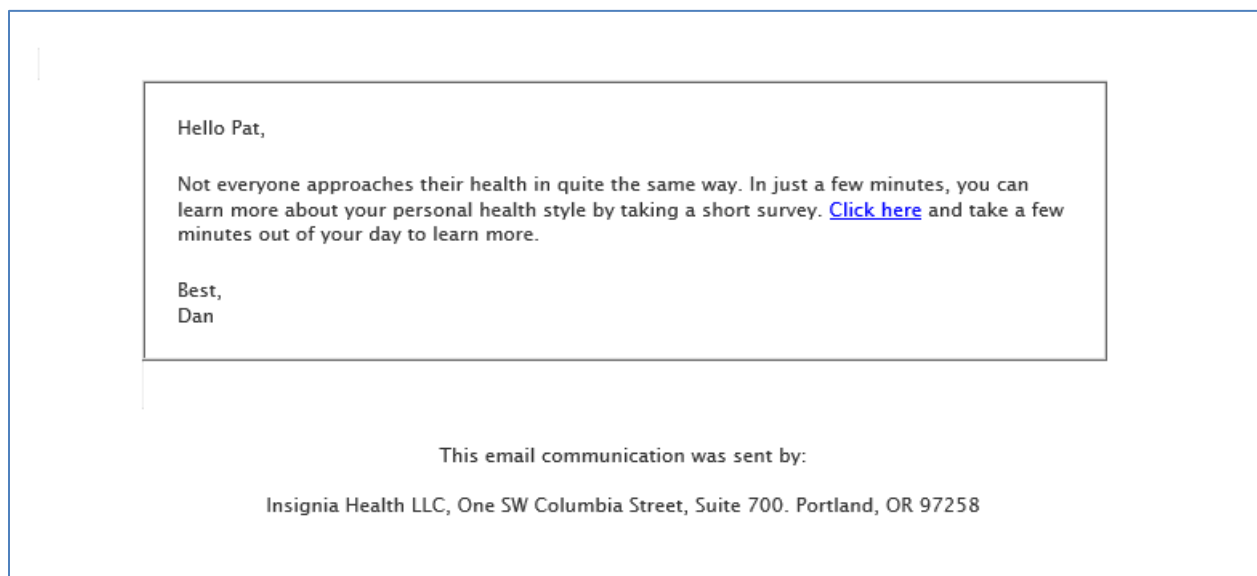

Figure 54. Email with a link to take the PAM Survey

Upon clicking the link in the email, the individual will be presented with the PAM survey that was chosen for them. The survey will be loaded in a new window or a new tab of the default browser on individual's device. The page is designed to work on smart-phones, tablets and computers.

Figure 55. PAM Survey

Once an individual completes the survey, they will be presented with a PAM-appropriate Health Style Report that they can download as a PDF. The system has four variations of the Health Style Report, one for each PAM level. Please note, if you chose any language other than English, the survey will be presented in that language. However, the email and the Health Style Report will be presented in English.

The individual's Health Style Report will also be added to the "Past Survey Results" area of the Surveys tab. This report is available for all individuals with a PAM, regardless of the survey mode. Selecting the "Health Style" button will open up a PDF of the report that can then be shared with the individual.

Figure 56. Health Style Report within the Surveys Tab

The survey will remain in a *Pending* state in the individual's profile until the individual takes the survey that was sent to them via email. More information about pending surveys is can be found below in the **Cancel Pending Survey** section. If the individual is unable to locate the initial email, there is an option for the user to resend the email to the individual.
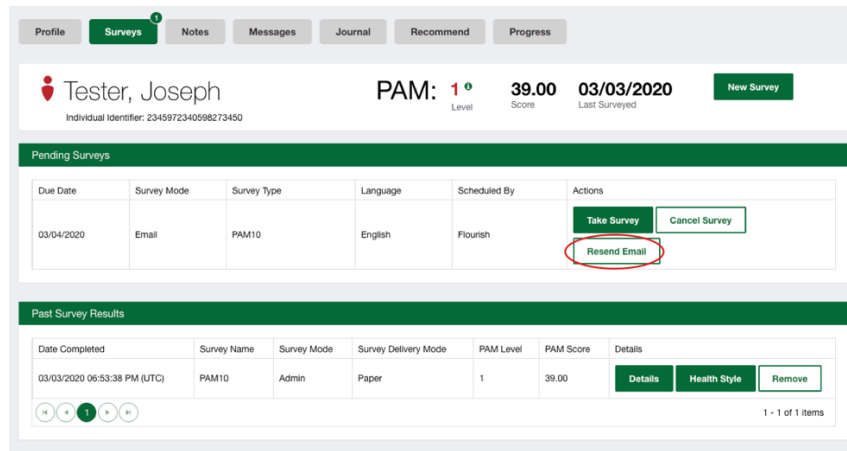
Figure 57. Pending Surveys Section with Resend Email Button

If the pending survey is cancelled or taken by the coach on the Flourish Administration site, it will not be available to be taken via link in the email and the individual will be presented with a screen saying that the survey is no longer available. All actions of scheduling and completing the survey will be recorded in the client history. Survey completion record will say how the survey was taken in.

The PAM survey is translated in multiple languages, but only some of them are currently loaded into Flourish. Languages that have a translated version loaded into the system are displayed in blue on the top of the drop-down list of languages. The number of loaded translations will grow and we will communicate to your organization when new versions of a survey in different languages are added. To request the prioritization of a particular language, please contact your account manager.

If you select one of these languages, you will be presented with a translated version of the PAM survey. If you select any other languages from the list, you will be presented with an English version of the survey. However, the system will collect information that the survey was taken in a different language using a paper translation.
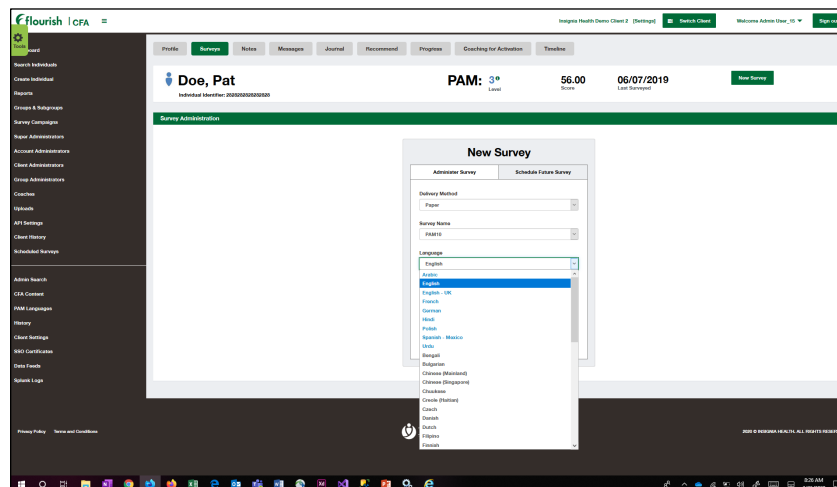

Figure 58. Survey Administration Screen with Language Dropdown Expanded

The system will always display a default value for the language field with selected survey type based on these rules:

- if a person that is being administered a survey has a preferred language selected in their profile, survey language will be defaulted to that language;
- if no language is selected in the Individual Profile, the system will look at the default language defined for your organization and it will be displayed as a default survey language.

You will be presented with the Take a Survey page where you will enter all survey answers.

Figure 59. Survey Example Within Flourish Admin

The survey may consist of more than one page. Go to the next page of the survey by clicking the "Next" button. After the last question is answered, click "Submit" to calculate the results. The system will show a PAM score and PAM level on the next screen, Survey Results. You've now completed administering the PAM survey.

If you do not fully complete the survey and click "Submit", the system will show you an error message for missing answers. You can also cancel entering survey by clicking the "Cancel this Survey" button.

SURVEY RESULTS

Upon submitting survey responses, the System displays a PAM score and PAM level and other survey attributes. It will also display how the individual responded to the survey questions. The Survey Results screen displays the name of the person that entered the survey and in what language it was administered. The "enterer" can be different from the coach. Enterer can be the person that typed the paper surveys into the Flourish Admin system. The enterer will say "System" if the survey was submitted from the API or survey batch upload process.
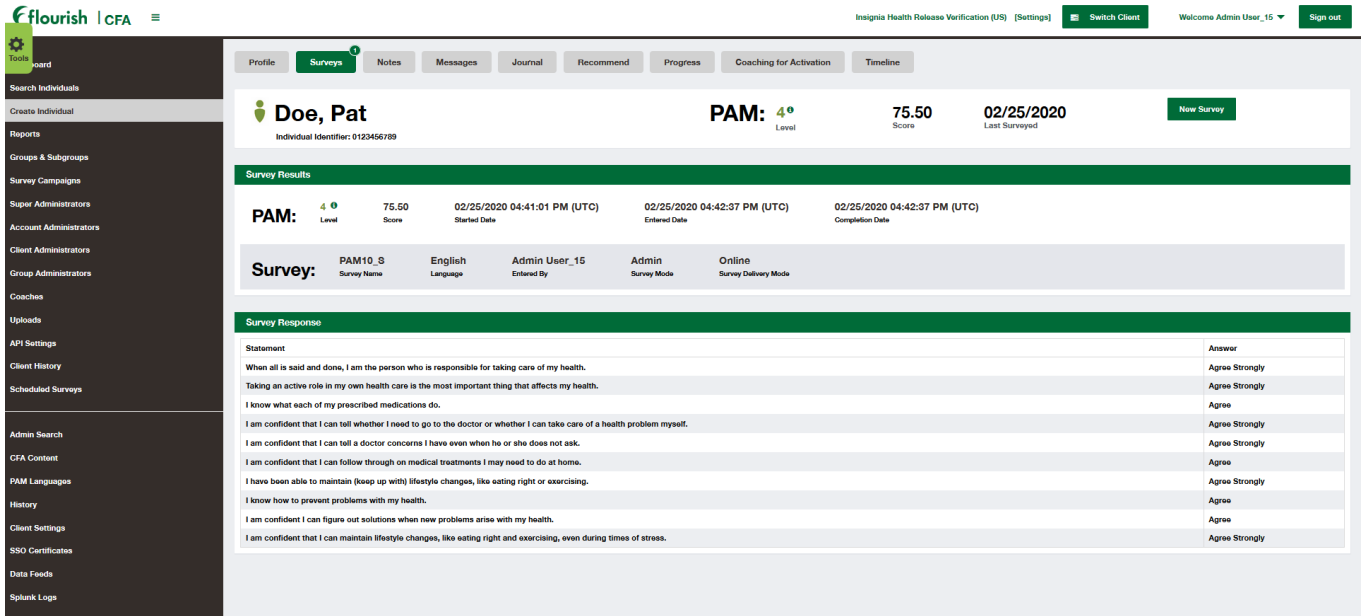
Figure 60. Survey Results

The most current PAM score and PAM level will be displayed on the Individual Profile. PAM level on the Survey Results page will have PAM Recommendations available.
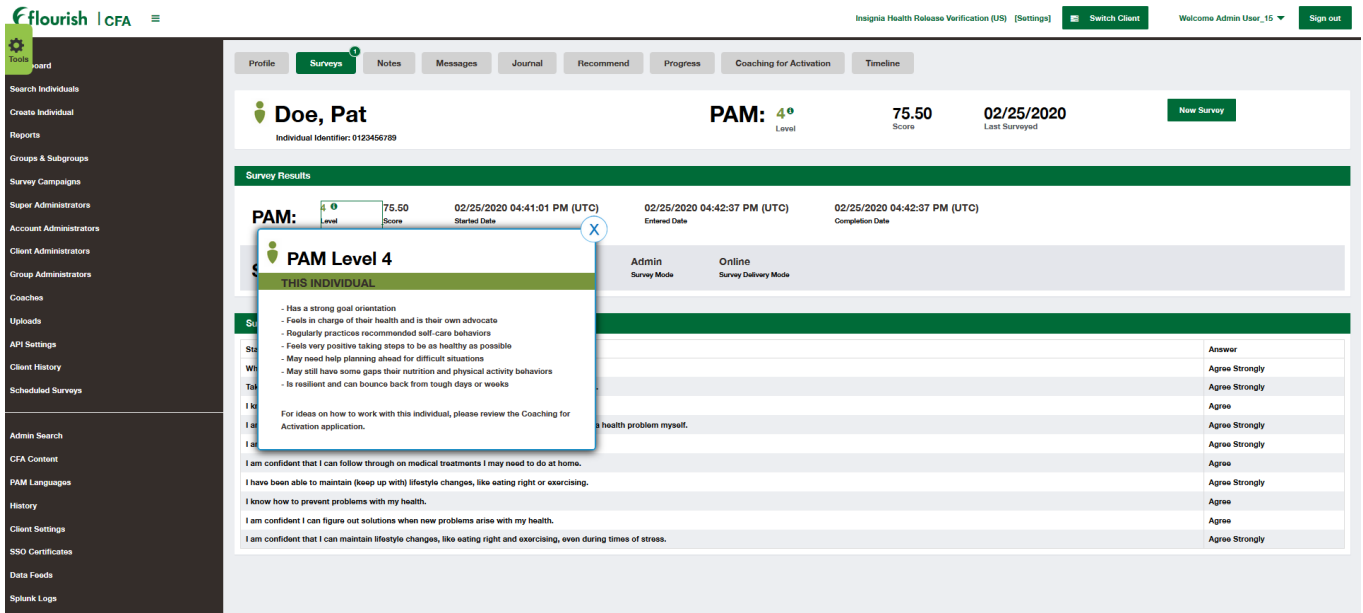

Figure 61. PAM Recommendations on the Survey Results Screen

SCHEDULE A SURVEY
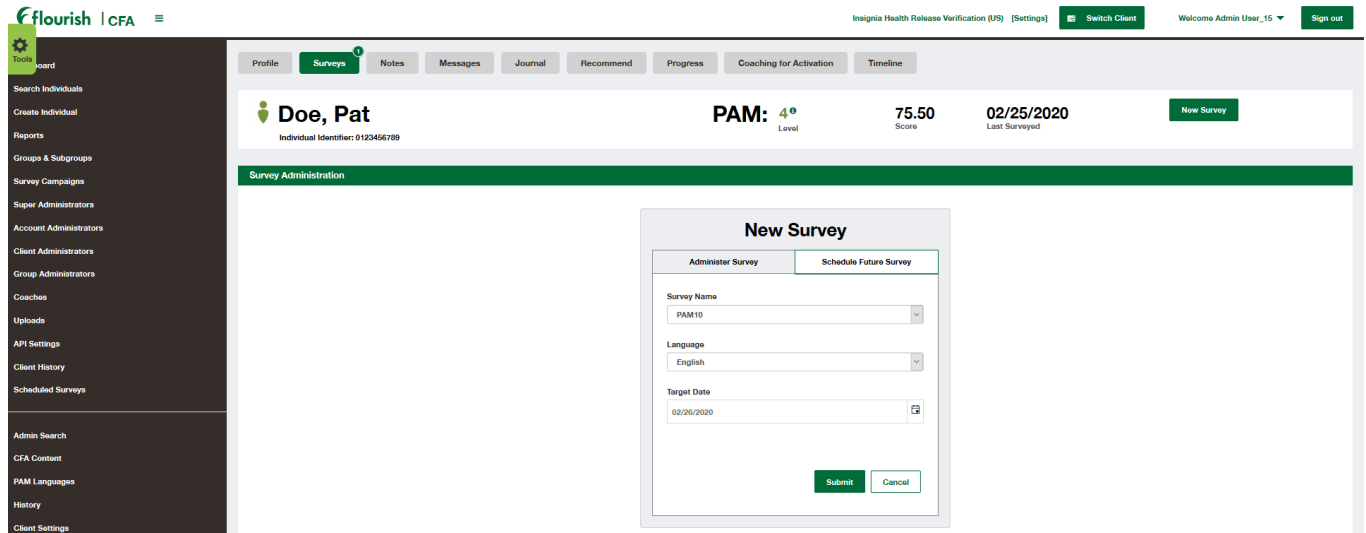
Figure 62. Schedule Future Survey Form

You can add a reminder for yourself to re-administer a survey for an individual by using the "Schedule Future Survey" tab on the Administer Survey form. This feature will also schedule a survey for an individual on their next login if they have access to the consumer site. The System will present a form where you will select the type of survey to be delivered, survey language, and target date.

The individual's profile will also show that there is a pending survey for the individual on the "Surveys" tab

Figure 63. Pending Survey Section on the Surveys Tab

Please note that you will not be able to schedule more than one survey of the same type to an individual. For example, if an individual has a pending survey PAM 13, you will get an error message when trying to schedule another PAM 13 for that individual.

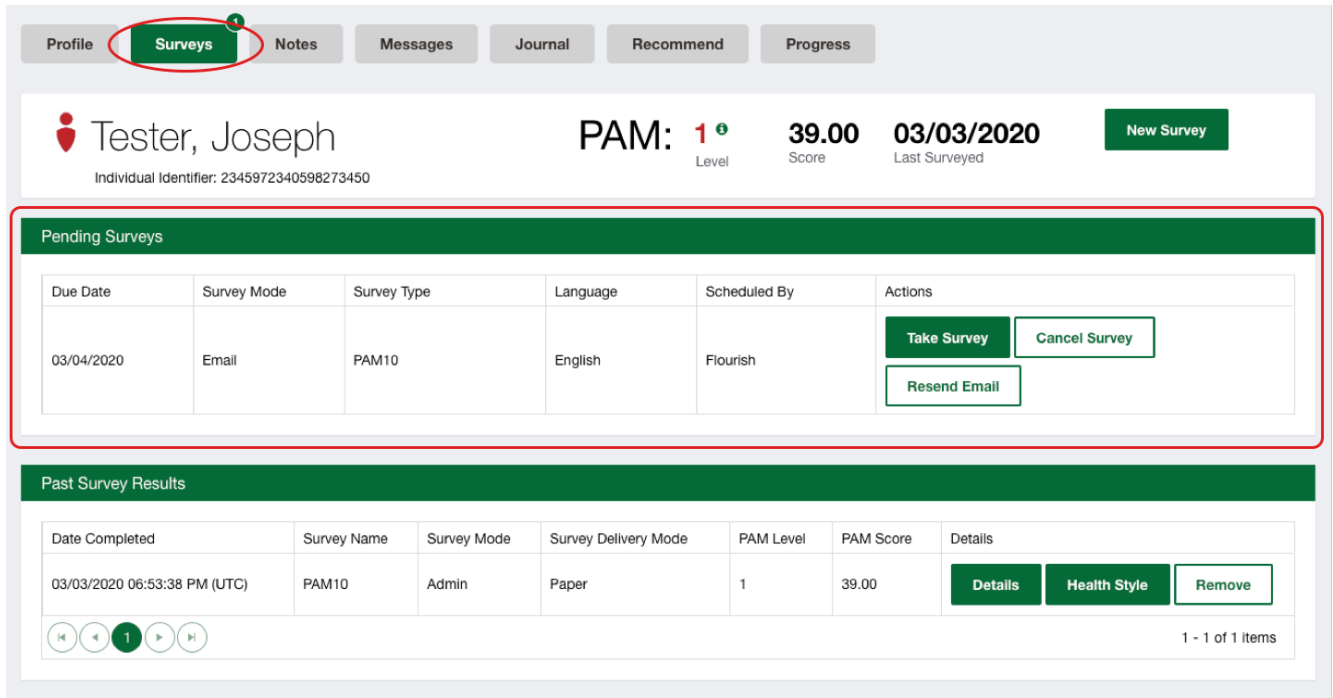To view all Scheduled Surveys, select the "Scheduled Surveys" option located on the left navigation menu. From here, you will be able to sort by all columns, Take Survey, and view the individual profile.

Figure 64. Pending/Scheduled Surveys List

Immediately after completing a PAM survey for an individual, the option to "Schedule next survey" is available at the bottom of the Survey Results page. Select the default of 90 days from todays' date, or choose a specific number up to 720 days (2 years) to create a reminder to re-administer a future PAM survey. All surveys scheduled through this feature will appear on the Timeline as a Scheduled Survey. Please Note: This option is only available after the completion of the survey and is absent from the page in most cases.
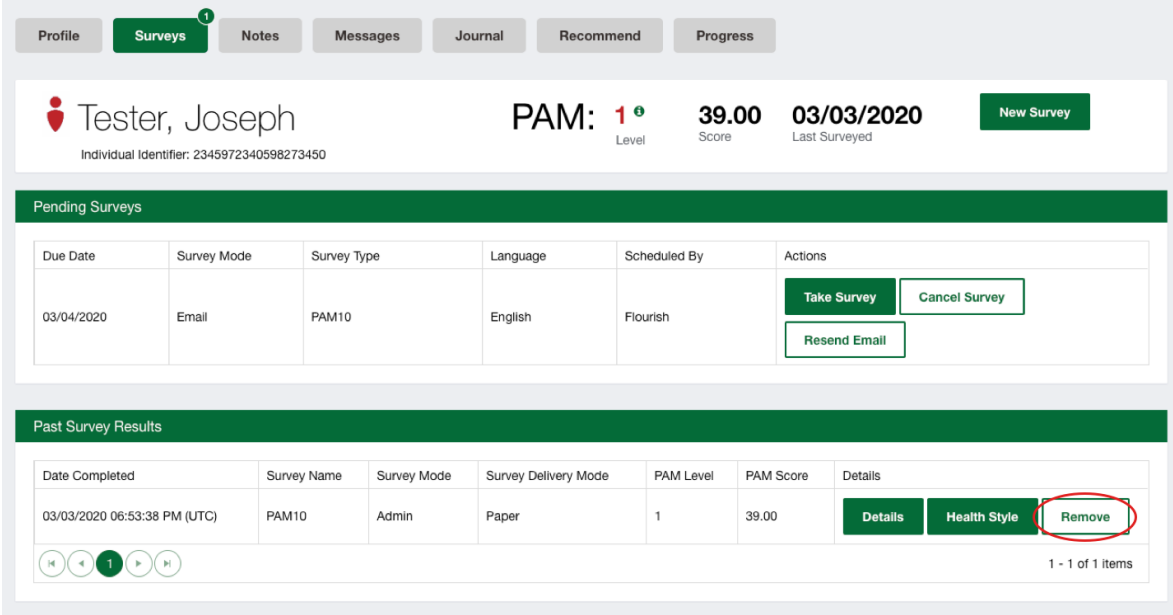
Figure 65. Schedule Next Survey Button on the Survey Results Screen

CANCEL 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.

REMOVE 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.

Figure 66. Remove Survey Button

RE-ADMINISTERING SURVEYS

Individual campaigns based on Insignia Health rules **(This feature will be available only if your organization is set up to have a Flourish consumer site)**

Your organization can request that Insignia Health set rules to automatically re-administer the PAM survey to all your individuals through the consumer site. The set of rules contains time (in days) since the last PAM completion, and the number of completed challenges or the number of articles read. Insignia Health has set default values; however, clients can modify these three values or request that the feature be solely time-based. For example, if an individual has completed their most recent PAM over 180 days ago and has completed 0 challenges or read 0 articles from the Health Library, default values are:

- 180 days;
- 5 challenges;
- 15 articles.

Your organization can request to IH that this feature be disabled altogether.

Survey Campaigns

You can schedule new PAM and HA surveys for your population by creating Survey Campaigns. This feature allows you to administer surveys (PAM, HA, etc.) on an annual or more frequent basis, such as for an open enrollment period.

When scheduling a new campaign, you will be able to select one or more of your groups and define a time frame for the campaign. When the campaign starts, all affected individuals will receive new surveys upon their next login based on their group settings. For example, if group XYZ has PAM 10 and HA surveys set up for administration through the Flourish consumer site during campaigns, all individuals from that group will be presented with PAM 10 and HA surveys upon their first login after the campaign start date. Individuals will not be able to proceed to the Flourish site unless they complete both surveys.

To create a new Survey Campaign, you will need to select "Survey Campaign" from the left side navigation bar. It will display a page with all existing survey campaigns for your organization. To create a new one, click on the "Create New" link in the section header near the top right-hand side of the main content frame.
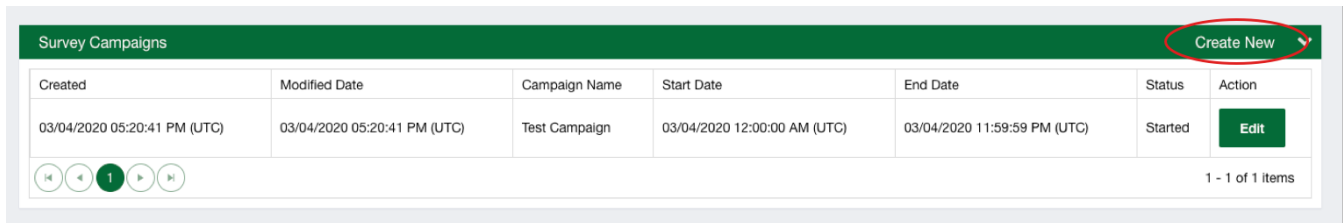

Figure 67. Create New Survey Campaign Link

You will be presented with a screen to enter a name for your new campaign, select the start and end date, and determine which groups should be part of it. You can also select a check box that says, "Send a new survey reminder email," a feature that is only available if your Flourish consumer site is configured to send emails to your individuals. If your Flourish site is indeed configured for this, individuals in your selected groups will receive a reminder email on the date you determined to start the campaign. You can use Insignia Health text or you can request to customize it during implementation.
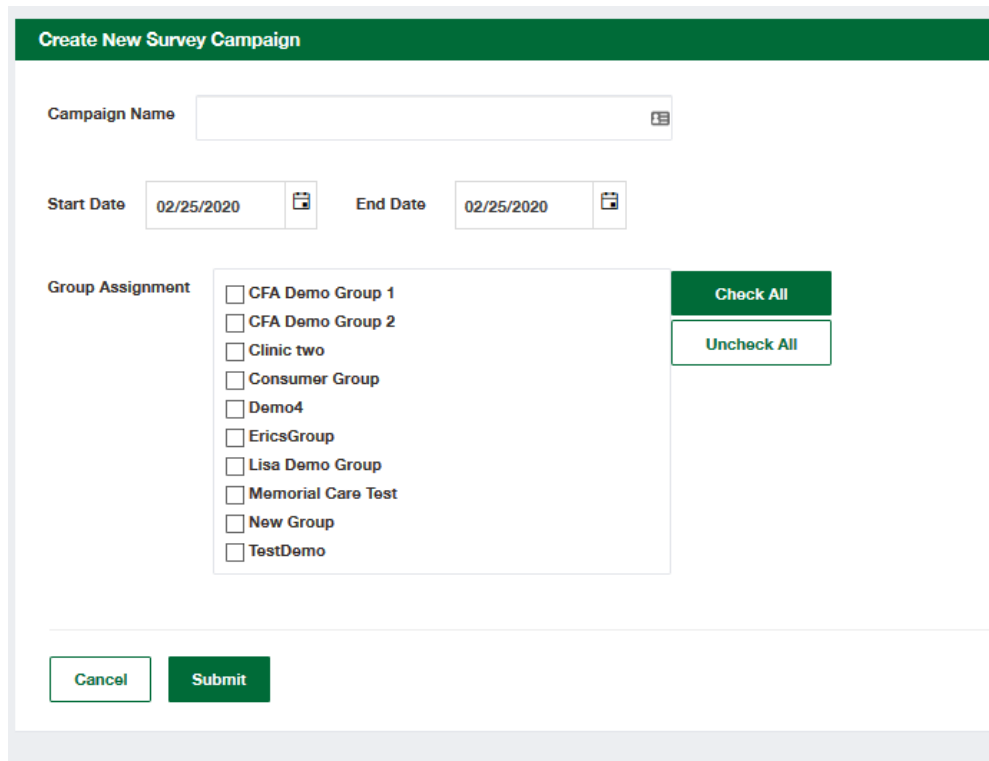

Figure 68. Create New Survey Campaign

You can also edit and delete survey campaigns that have not started yet (status *Scheduled*) by clicking the Edit or Delete button for the selected campaign on the list of Survey Campaigns.
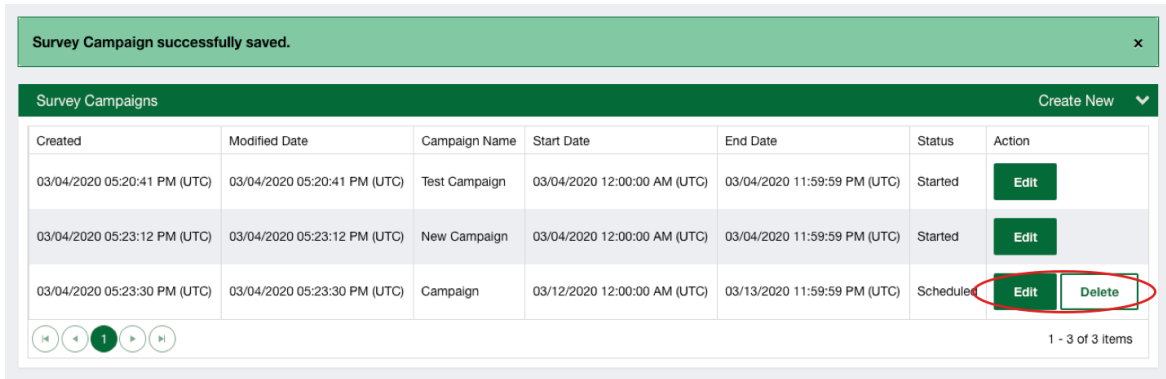
Figure 69. Edit/Delete Scheduled Campaign

You can delete a campaign that has not yet started (Status *Scheduled*) by clicking "Edit", then clicking the "Delete Campaign" button on the bottom of the Edit Survey Campaign screen.

Figure 70. Delete Campaign

If you select the Delete Button, the survey campaign will be deleted and you will be presented with a success message that reads: "Survey Campaign successfully deleted"
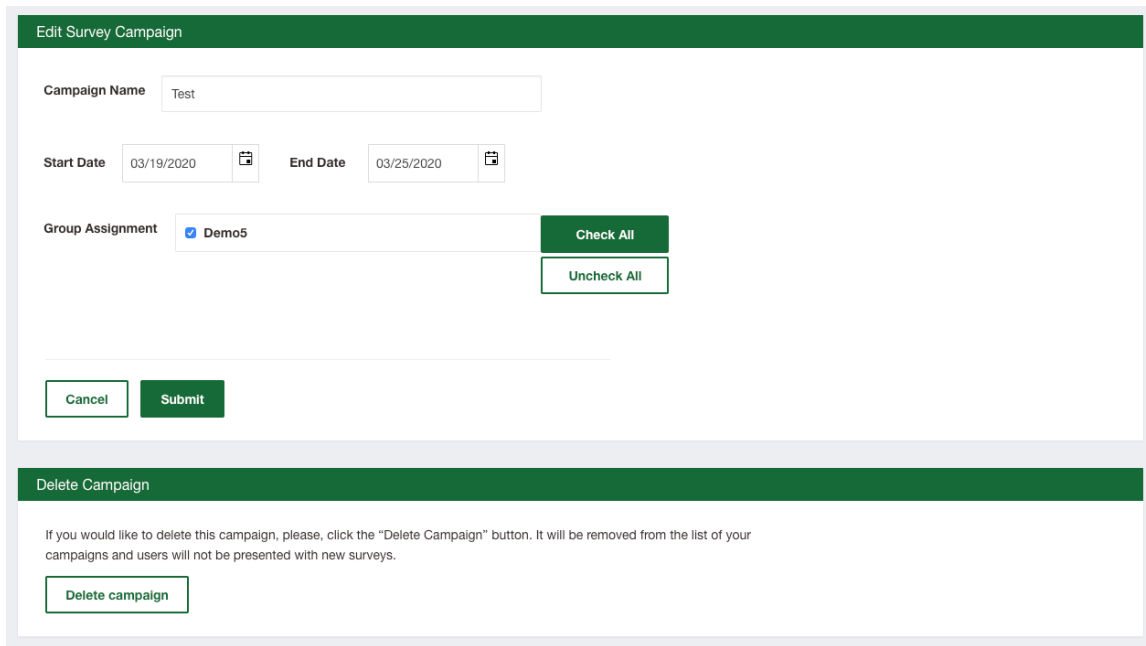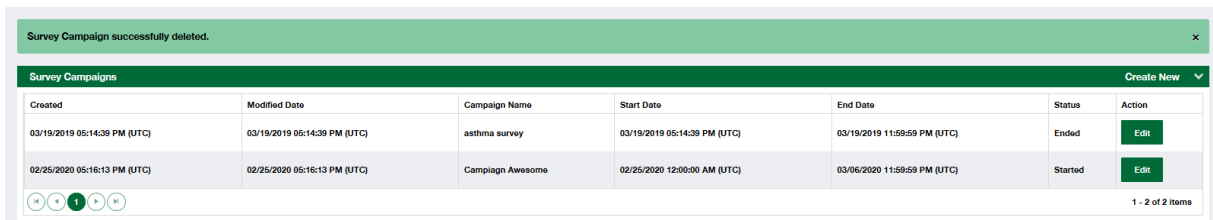

Figure 71. Successfully Deleted Campaign Message

You can end a campaign that has passed the start date (status *Started*) by clicking "Edit", then clicking the "End Campaign" button on the bottom of the Edit Survey Campaign screen.

Figure 72. End a Campaign That Has Already Started

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.

Figure 73. Download Client History to CSV

ACCESSIBILITY

The Flourish Admin application supports alternate navigation techniques and is compatible with most screen readers. Below you will find a list of accessible keyboard shortcuts and associated actions:

Keyboard Shortcut	Action
Tab	Navigate between tab-able page elements **OR** navigate between buttons within a grid cell
ALT + W	Enter into a grid/table **OR** enter a cell with buttons nested within a grid/table cell
ALT + X	Exit a grid/table
Enter or Spacebar	Select
Up, Down, Left, Right Arrows	Navigate within a grid/table/dropdown list
CTRL/CMD + SHIFT + Plus Sign (+)	Zoom In
CTRL/CMD + SHIFT + Minus Sign (-)	Zoom Out

GLOSSARY

Insignia Health, IH	The company that developed Flourish Admin
Flourish	A tool that measures a patient's activation level through a self-registration process.
Flourish Admin	A tool that measures a patient's activation level, stores patients' personal information and accumulates PAM measurements over time.
Flourish Admin User	A person who has an account with the Flourish 2.0 Admin Tool. It can be an Insignia Health employee, employees of Insignia clients or representatives of their partners.
Insignia Health Admin	An IH employee who has a full access to Flourish 2.0 Admin Tool functionality.
Coach	A role that can be assigned to an employee of an organization that has purchased a Flourish product. Coaches work directly with patients providing support in health management.
Lead Coach	A role similar to a Coach with one additional right: Lead Coach can assign individuals to other coaches.
Group Admin	A role that can be assigned to an employee of organization that has purchased a Flourish product. This role is similar to Client Administrator with access limited to specific groups and subgroups.
Client Admin	A role that can be assigned to an employee of organization that has purchased a Flourish product. This would be a person who is managing Coaches and their workload.
Individuals	A person whose PAM level is measured by using the Flourish platform. This person may have access to the Flourish consumer site, or his or her information is added to the Flourish Admin Tool by a Coach. Individuals can be patients, primary caregivers to patients, parents of a patient or employees of an organization.
Individual Profile	A summary of information about an Individual, including personal information, the most recent PAM level and score, and the full history of PAM surveys and Health Assessment surveys taken.
PAM	Patient Activation Measurement, an assessment that gauges the knowledge, skills and confidence essential to managing one's own health and healthcare.
Survey	A set of questions designed to collect information from a certain population.
PAM Survey	A set of questions designed to measure a patient's activation.
PAM Score	A number between 0 and 100 that is calculated based on answered PAM survey using the IH algorithm. A PAM score segments individuals into one of four progressively higher activation levels. The PAM score can also predict healthcare outcomes including medication adherence, ER utilization and hospitalization.
PAM Level	Defined by PAM score, PAM level gives a broad array of self-care behaviors and offers deep insight into the characteristics that drive health activation.

PAM Outlier Logic	An individual that completed Caregiver, Parent, or PAM surveys with any of the following will be flagged as an outlier: - If an individual answers all "Disagree Strongly" (PAM 6, 10, 13) - If an individual enters all "Agree Strongly" (PAM 6, 10, 13) - If an individual enters all "Agree" (PAM 6, 10, 13) - An individual answering 3 or more NA's with PAM 10, will be given a score of 51 and Level 2 - An individual answering 4 or more NA's with PAM 13, will be given a score of 51 and Level 2 - An individual answering more than 2 NA's with PAM 6, will be given a score of 51 and Level 2
Survey History	All surveys that an individual has taken and that have been stored in the system.
Eligibility File	An eligibility file contains information about individuals that will have access to the Flourish consumer site. It is used to enforce validation of individuals during the registration process.