



Insignia Health

COACH MANUAL

FLOURISH ADMIN TOOL – NOVEMBER 2018 RELEASE



CONTENTS

Purpose..... 4

Your Organization Settings 4

Coach Scenarios 4

 Scenario #1: Get Started 4

 Scenario #2: Input a PAM Survey for a New Individual 5

 Scenario #3: Administer Survey for an Existing Individual 5

Function Descriptions 6

 Registration..... 6

 Access the System 6

 Login 6

 Passwords 7

 Forgot Username 7

 Log Off 8

 General Functionality 8

 Dashboard 8

 Navigation within the Tool 9

 Edit Account..... 9

 Change Password..... 9

 Privacy Policy & Terms and Conditions 10

 Individuals..... 10

 Create Individual..... 10

 "Actively Coaching" Relationship 12

 Search for an Individual 13

 Search Box 13

 Search Results..... 14

 Individual Profile..... 14

 Edit Individual Information 17

Insignia ID	18
Survey History.....	19
View Survey Responses	19
Surveys.....	20
Administer Survey	20
Survey Results.....	27
Schedule a Survey.....	29
Cancel Pending Survey	31
Remove Survey	31
Pending Surveys.....	32
Reports	32
General Report Functionality	32
PAM Level Distribution Report.....	35
PAM Responses Report	36
PAM Trend Report.....	36
PAM Individual Data Report.....	37
PAM Change Within Levels Report.....	38
CFA Content Usage Report	39
CFA Goals Usage Report	40
CFA Steps Usage Report	40
CFA Resource Usage Report.....	40
Population Data	40
HA Individual Data Report	40
Challenge Data.....	41
Glossary	42
Index	43
History of Updates.....	43

PURPOSE

Coaches and other Flourish Admin users can use this manual to learn how to administer PAM surveys to users. This manual also covers general functionality, site registration, and site access.

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 system. Your organization's structure can consist of up to two levels of hierarchy: group(s) and subgroup(s).

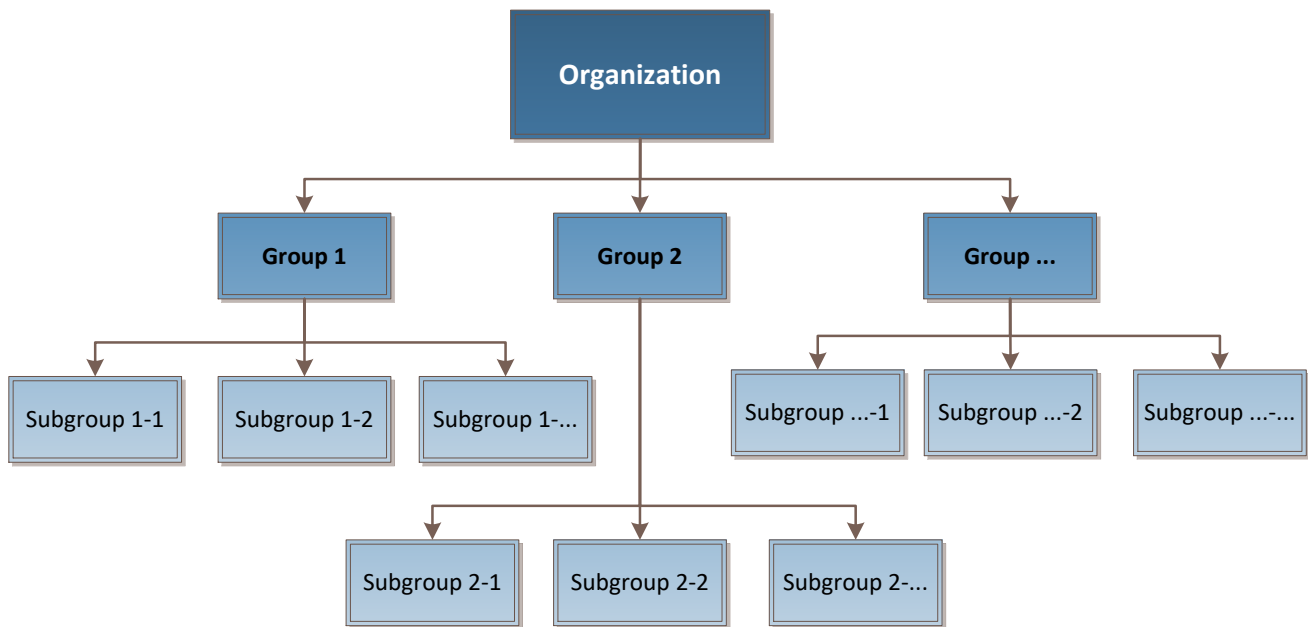


Figure 1. Organizational Structure

Your organization will have designated Client Administrators who will manage your organization's structure. Client Administrators will also create accounts for other users in your organization and manage their access to groups and subgroups. As a Coach, you will be assigned to at least one of the groups and subgroups. You will have access to view data of individuals assigned to your groups and subgroups.

Your organization can also have Group Administrators. They will also be able to create Coaches.

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 for all users.

COACH SCENARIOS

SCENARIO #1: GET STARTED

To start using the Flourish Admin tool, you need to be registered.

1. Your Administrator creates an account for you.

2. You will receive a Welcome Email.
3. Click a link within the email and complete your Registration.
4. View your Dashboard.
5. Log Off and close your browser.

SCENARIO #2: INPUT A PAM SURVEY FOR A NEW INDIVIDUAL

TIP: Complete the first three steps prior to calling your patient if completing the PAM Survey via phone.

1. **Login** to the system.
2. Click "**Create Individual**" on the left side menu. Fill out as much individual information as necessary for your organization.
3. Choose "Create Individual and Administer Survey" after completing the form.
4. Administer survey to the patient, selecting either the "Phone", "Paper", "Email," or "In person" option, and then input the PAM answers.
5. A PAM score and PAM level will be generated on the next screen, **Survey Results**.

Continue your workflow as needed. You can choose your next step by selecting from the presented options on the **Survey Results** screen or by choosing a menu item from the left side.

SCENARIO #3: ADMINISTER SURVEY FOR AN EXISTING INDIVIDUAL

This scenario describes how you can use the system to administer PAM to an existing patient during a real-time session.

TIP: Complete the first four steps prior to calling your patient if completing the PAM Survey via phone.

1. **Login** to the system.
2. Select a patient from your dashboard or use the **Search for an Individual** option to look up your patient.
3. If you cannot find the patient, create a new individual by clicking the "Create Individual" button (**Scenario #2**).
4. Start a new survey by clicking the "Survey" button on the search results grid.
5. **Administer Survey** to the patient, selecting the delivery mode option, and the input PAM answers.
6. A PAM score and PAM level will be generated on the next screen, **Survey Results**.

Continue your workflow as needed. You can also choose your next step by selecting presented options on the **Survey Results** screen or by choosing a menu item from the left side.

FUNCTION DESCRIPTIONS

REGISTRATION

Registration is required to access the Flourish Admin Tool. To complete registration, the Client Admin will first create an account for you, triggering a Welcome email to your inbox.

- 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.

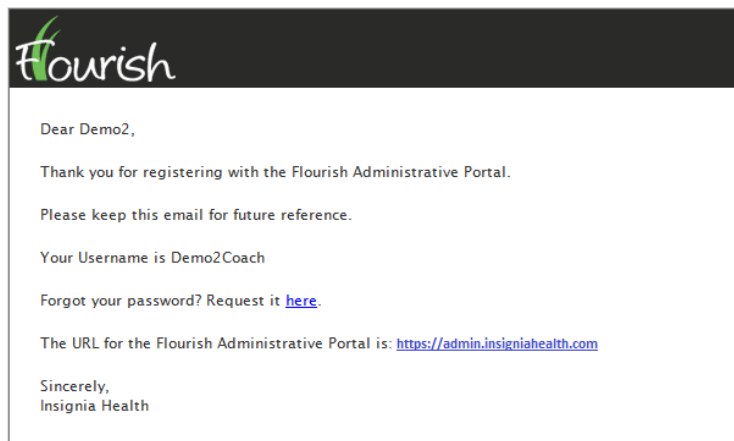
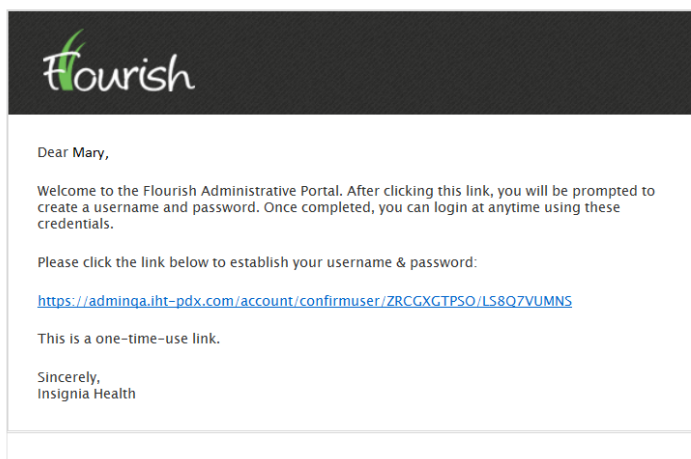


Figure 4. Confirmation Email



One SW Columbia Street Suite 700 Portland OR 97258

Figure 2. Welcome Email

Figure 3. Complete Registration form

ACCESS THE SYSTEM

LOGIN

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

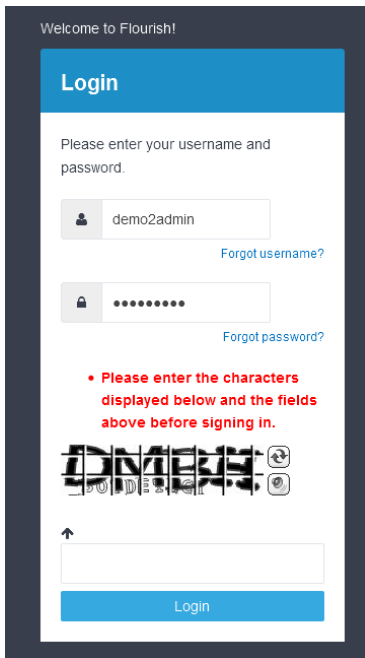


Figure 6. Additional Security

Note: If you are located in a different country than US, you may need to contact your account manager at Insignia Health to get another 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 “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 will 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.

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. However, most organizations do not use this feature.

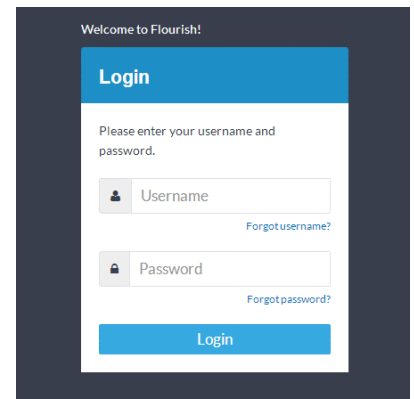


Figure 5. Login page

use this feature.

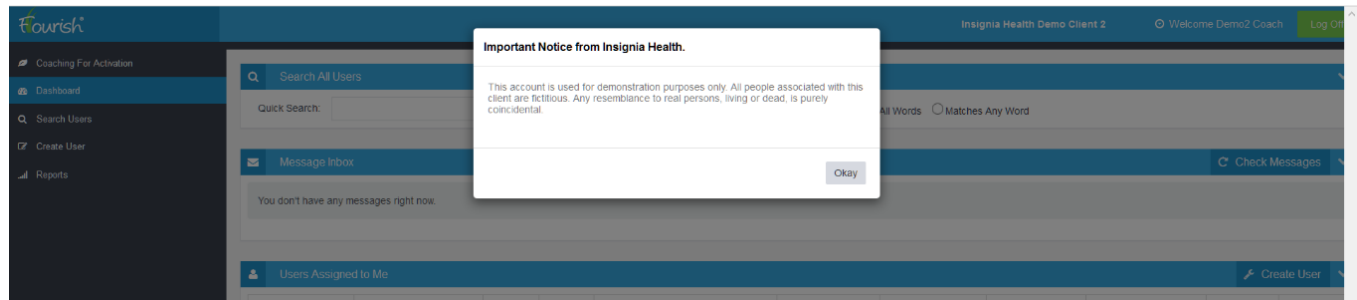


Figure 7. User Alert

PASSWORDS

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.

FORGOT USERNAME

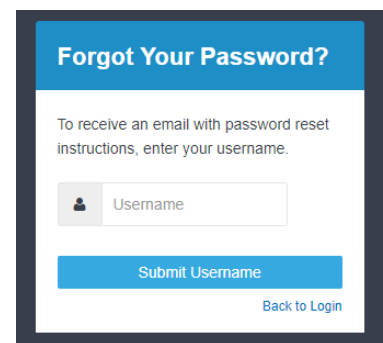


Figure 8. Retrieve Password form

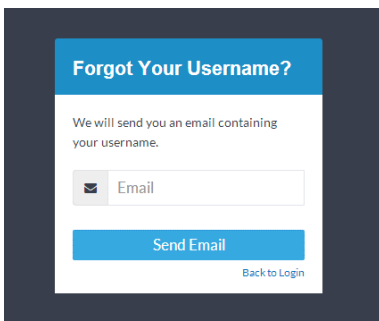


Figure 9. Retrieve Username form

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

LOG OFF

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.

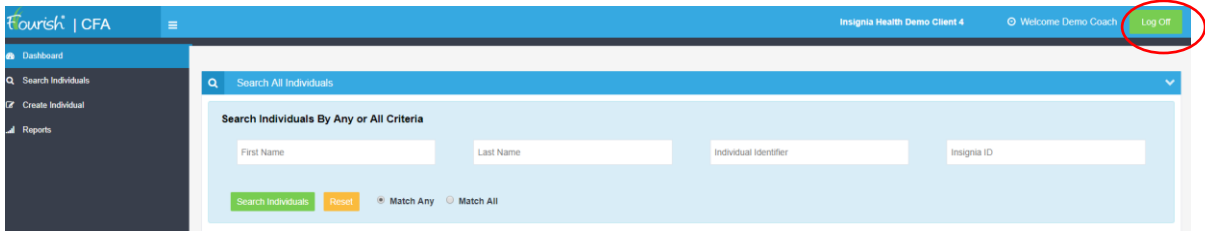


Figure 10. Log Out from the System

GENERAL FUNCTIONALITY

DASHBOARD

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

- A. Search box;
- B. Message Inbox – if your organization is configured to have a consumer site with message capability;
- C. Individuals recently added to the system that you are assigned to you, which include the following data:
 - o Date and Time of registration (in Coordinated Universal Time, or 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 (⚠️), signifying an unusual PAM survey answer pattern.
- D. Left side navigation bar that is accessible on all pages.

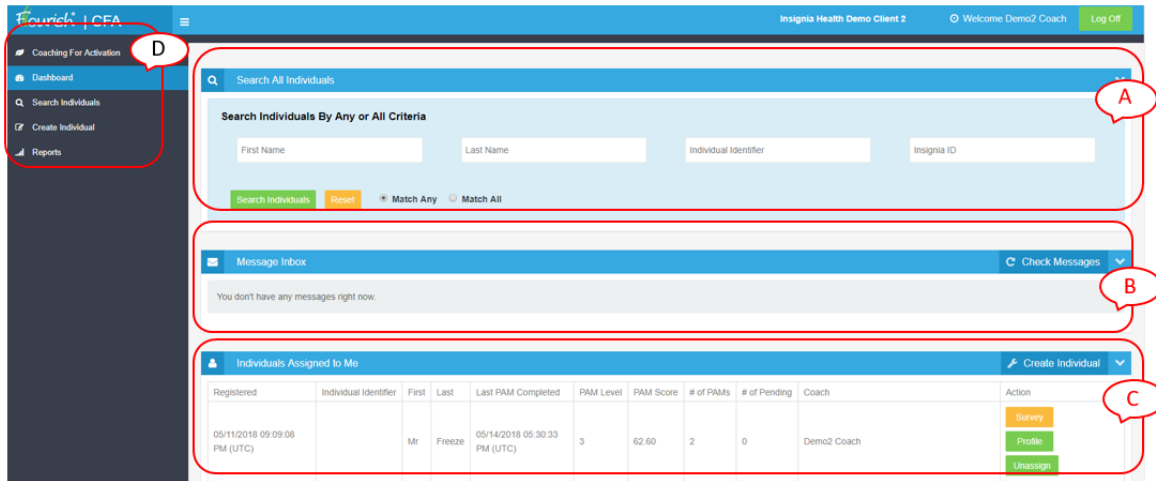


Figure 11. Coach Dashboard

NAVIGATION WITHIN THE TOOL

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

Registered	Individual Identifier	First	Last	Last PAM Completed	PAM Level	PAM Score	# of PAMs	# of Pending	Coach	Action
07/06/2018 05:36:19 PM (UTC)	71618	Stephany	Prude	11/29/2018 11:22:31 PM (UTC)	3	72.10	2	0	Demo4 Coach	Survey, Profile, Unassign
09/21/2017 07:57:16 PM (UTC)	45455563721	Jane	Doe	11/20/2018 10:30:11 PM (UTC)	1	31.90	3	0	AdminUser First AdminUser Last, Demo4 Coach	Survey, Profile, Unassign

Figure 12. 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 and assigned groups and subgroups. You will be able to modify only your personal information.

Use the form below to update the user account information.

Account Information

Username: DemoCoach

Name: Demo, Coach

Contact Information: testadmin@insigniahealth.com

Enable PAM App for User:

Role: Coach

Other Settings: Allow this account to manage users from the following groups and subgroups.

- ☑ CFA Demo Group 1
- ☑ CFA Demo Group 2
- ☐ Clinic two
- ☑ Consumer Group
- ☑ Demo4
- ☑ Use Demo Group
- ☑ Memorial Care Test
- ☑ New Group
- ☑ Test/Demo

Submit

Figure 13. Edit My Account form

CHANGE PASSWORD

If you want to change your password, choose Change Password from the drop-down menu options that appear after clicking on your name at the top right.

Figure 14. Change Password form

The system requires you to enter your current password. Then, enter your new password twice. Ensure 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.

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 stores and utilizes individual information.

INDIVIDUALS

CREATE INDIVIDUAL

Flourish Admin tool refers to your patients or members as "Individuals". These are people who may be granted access to the Flourish consumer-facing site if your organization has licensed this product from Insignia Health.

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.

Registered	Individual Identifier	First	Last	Last PAM Completed	PAM Level	PAM Score	# of PAMs	# of Pending	Coach	Action
07/06/2018 05:36:19 PM (UTC)	71618	Stephany	Prude	11/29/2018 11:22:31 PM (UTC)	3	72.10	2	0	Demo4 Coach	Survey Profile Unassign
09/21/2017 07:57:16 PM (UTC)	454555563721	Jane	Doe	11/20/2018 10:30:11 PM (UTC)	1	31.90	3	0	AdminUser First AdminUser Last_Demo4 Coach	Survey Profile Unassign

Figure 15. Create Individual options

To create a new individual, the Coach will need to fill out the form. If you are assigned to more than one group or subgroup, indicate the group and subgroup for the new individual. Otherwise, the new individual will be assigned to your only group and subgroup automatically.

Your organization will be able to configure what fields should be collected for your individuals. This can be as little as a single field “Individual ID,” or 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.

If your organization collects Preferred Language, the list of available languages is extended to 46 languages with an “Other” option available at the bottom of the list.

Upon completion of the individual profile, you can choose to start administering a survey immediately. You can click the “Create Individual” button to see the individual’s profile, or you can click “Create Individual and Administer Survey” to start a new survey for that individual. The individual’s profile can be modified later.

Create New Individual

To create an individual, please enter the following information. Collect as much information as you need.

Select a Group and Subgroup
Choose a Grouping

Individual Identifier
Individual Identifier is a unique number that is assigned to the individual by your organization so that you can match the individual up to other systems. An example might be an employee ID, Insurance ID or some other unique ID.

First Name

Middle Name or Initial

Last Name

Birthdate
Select Month | Select Date | Year

Gender
Select a Gender

Ethnicity
Select an Ethnicity

Preferred Language
Select a Preferred Language

Postal Code

Telephone

Email Address

Create Individual | Create Individual and Administer Survey

Figure 16. Create New Individual form

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.

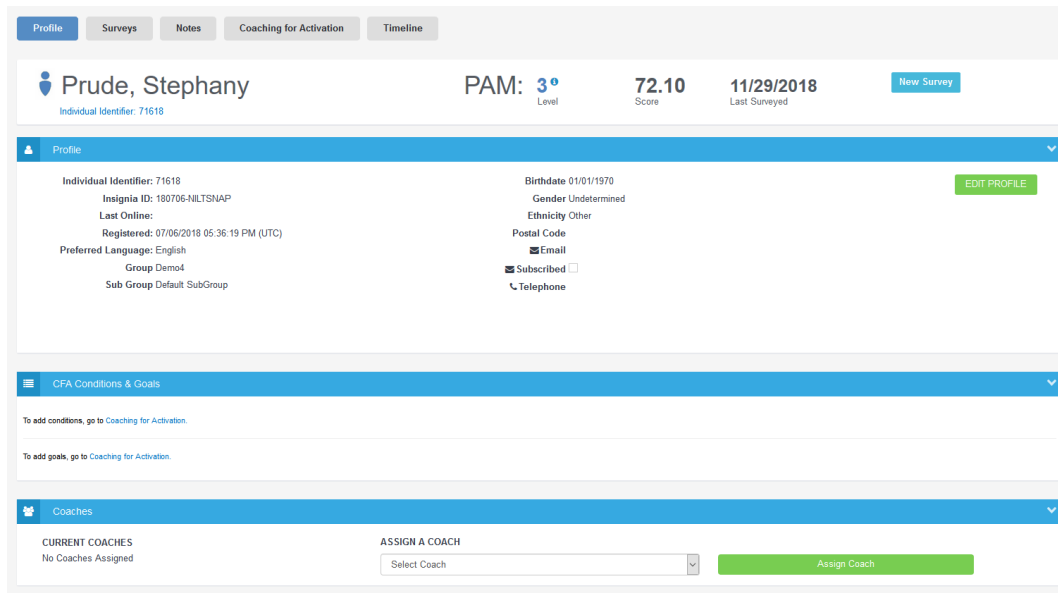


Figure 17. Individual Profile

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

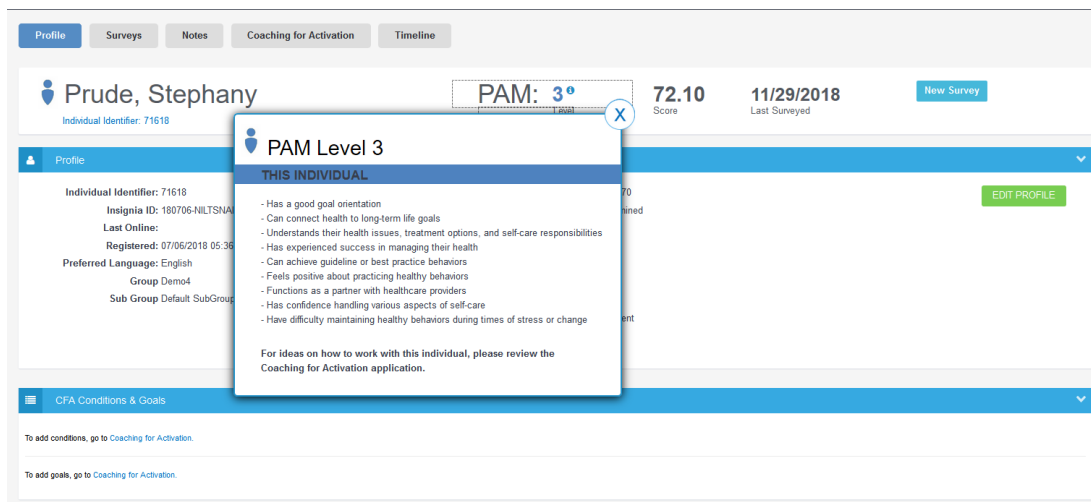


Figure 18. PAM Recommendation for Level 3.

"ACTIVELY COACHING" RELATIONSHIP

An Individual created by the Coach will automatically be assigned to this Coach. That means that an “actively coaching” relationship is created between the Coach and Individual. Individuals that are assigned to the Coach will appear on the Coach’s Dashboard. The Coach can unassign individuals by clicking the “Unassign” button on the Dashboard or via the Search Results page after searching for the individual. The Coach can assign individuals that are within the coach’s group/subgroup to themselves.

An Individual may have an "actively coaching" relationship with zero, one or multiple Coaches.

Assigning an Individual to a Coach places the Individual on the Coach's Dashboard list.

Some coaches can be given permission to assign other coaches to their individuals. This role is called Lead Coach.

Profile Surveys Notes Coaching for Activation Timeline

Prude, Stephany
Individual Identifier: 71618

PAM: 3^o Level
Score: 72.10
Last Surveyed: 11/29/2018

Profile

Individual Identifier: 71618
Insignia ID: 180706-NILTSNAP
Last Online: Registered: 07/06/2018 05:36:19 PM (UTC)
Preferred Language: English
Group: Demo4
Sub Group: Default: SubGroup

Birthdate: 01/01/1970
Gender: Undetermined
Ethnicity: Other
Postal Code:
Email:
Subscribed:
Telephone:
3rd Party Consent: No Consent

CFA Conditions & Goals

To add conditions, go to Coaching for Activation.
To add goals, go to Coaching for Activation.

Coaches

CURRENT COACHES
Demo4 Coach (testadmin@insigniahealth.com)

ASSIGN A COACH
Select Coach

Figure 19. Assign and Un-assign a Coach on Individual Profile

SEARCH FOR AN INDIVIDUAL

Coaches will have several tools to look up an Individual previously entered into the system:

- View the list of Individuals assigned to a Coach on the Dashboard;
- Search box on the Dashboard;
- Search accessible from the left side navigation bar.

A Coach cannot access individuals that are not in a group/subgroup that he/she is assigned to.

SEARCH BOX

Search box allows you to search for 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 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.

Individual Search

Search Individuals By Any or All Criteria

First Name Last Name Individual Identifier Insignia ID

Match Any Match All

By PAM Level PAM Score First Name Last Name Insignia ID Group Subgroup Individual ID

< 1 > No items to display

Figure 20. Search Parameters

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

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

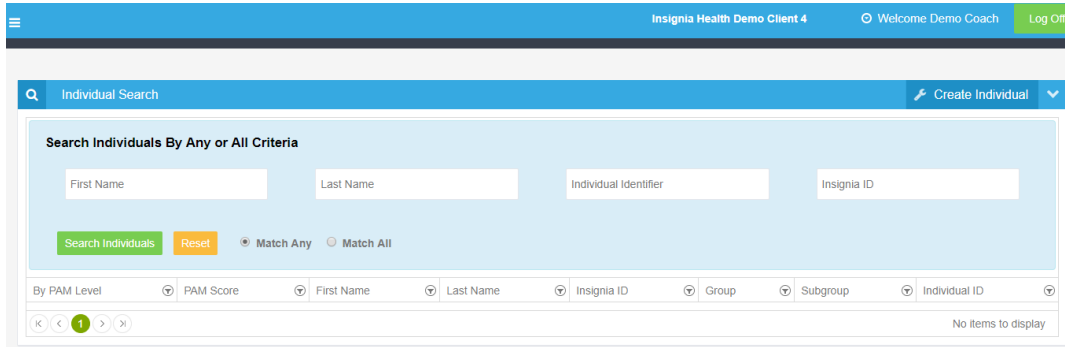


Figure 21. Search page

In addition to 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 results will be shown in a grid with detailed individual information. From there, you can also go to an individual's profile, start a new survey for the selected individual or change the individual's connection to you. If an individual is assigned to you, the system will show an "Unassign" button on the individual's record. If the individual is *not* assigned to you, the system will show the "Assign" button for that individual.

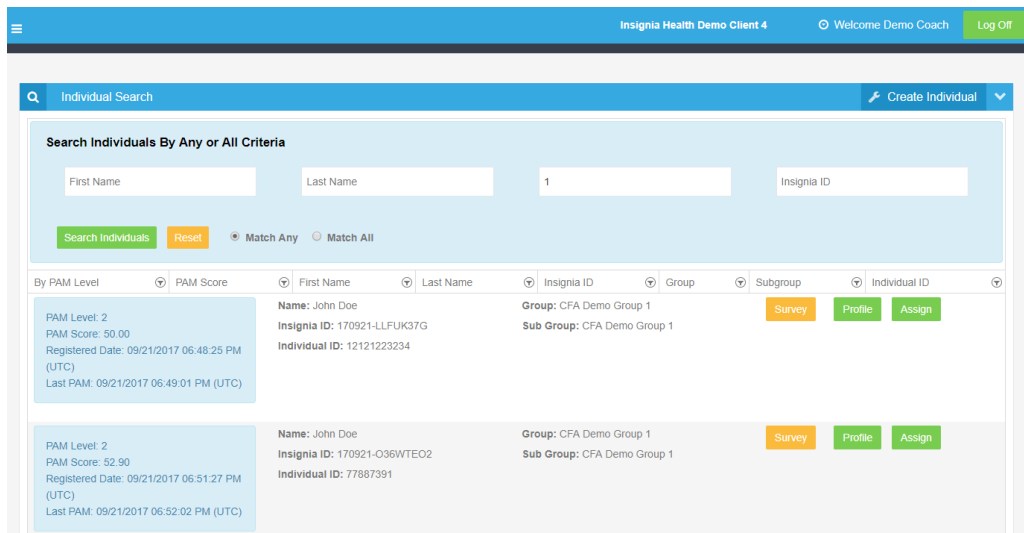


Figure 22. Individual Search Result

INDIVIDUAL PROFILE

To view Individual Profile, click the "Profile" button for the selected Individual on your Dashboard or on 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 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 consumer-facing Flourish site:

- Messages: This tab displays all messages sent to the participant. Additionally, this is where Coaches can send messages to the individual.
- Journal: This tab displays an individual’s journal entries to the Coach.
- Flourish: 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.

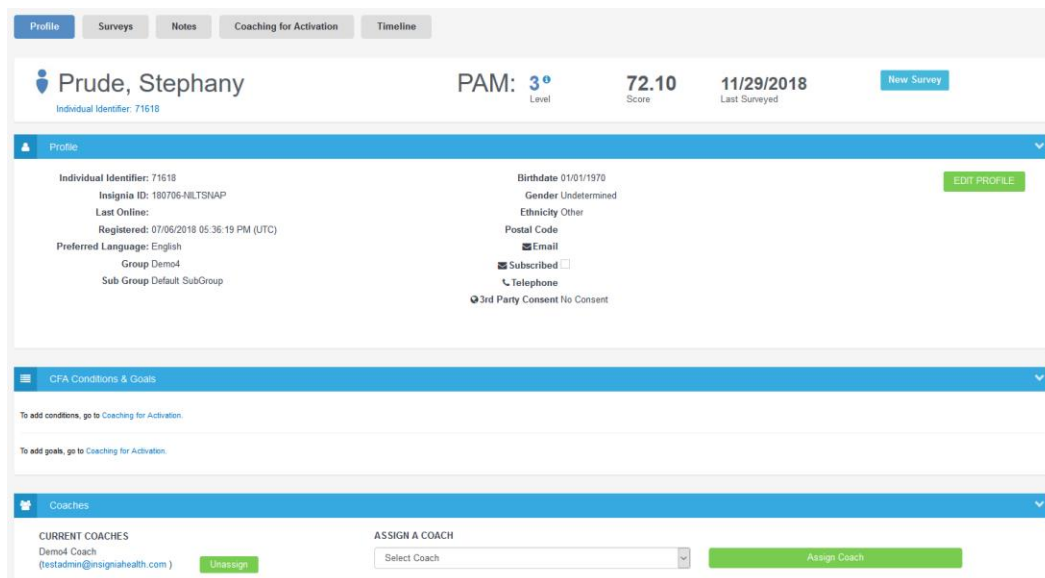


Figure 23. Individual Profile

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 to the system (Survey Mode), and the responses. From the survey tab, client and group admins can also schedule a future survey for the individual or take a new survey.

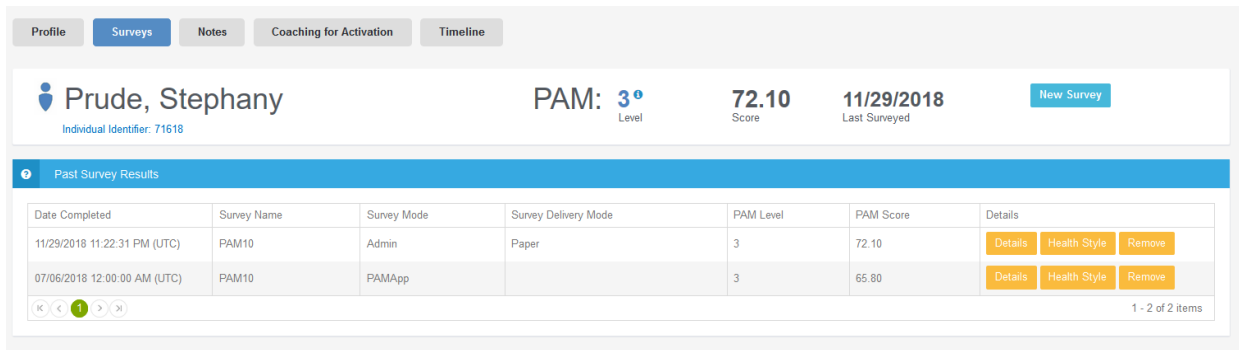


Figure 24. Individual Surveys

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.

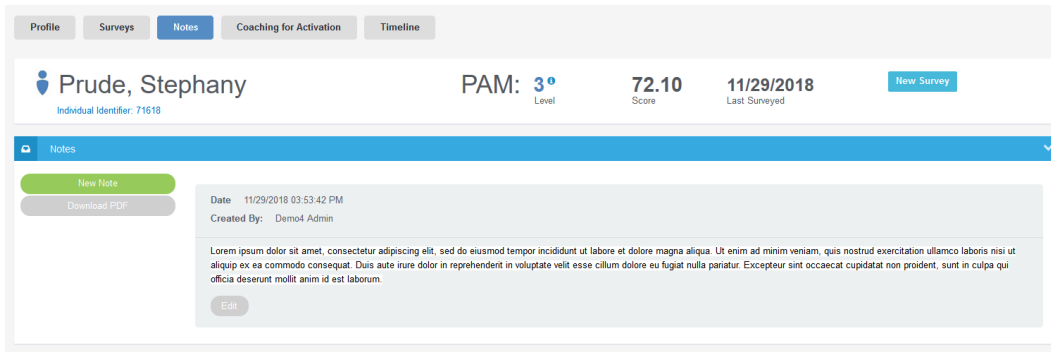


Figure 25. Notes

The site allows you to review and send 1:1 messages to individuals. The Individual can in turn reply to messages that the Coach sent him or her, but cannot initiate 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 if needed.

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

You can review an individual's journal entries that were entered on the Flourish consumer site. Journals 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.

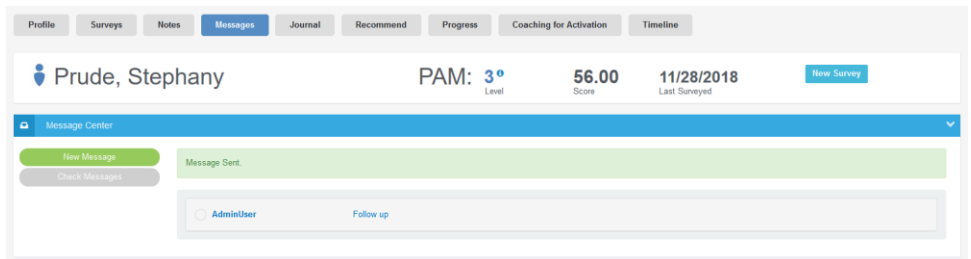


Figure 26. Individual Messages

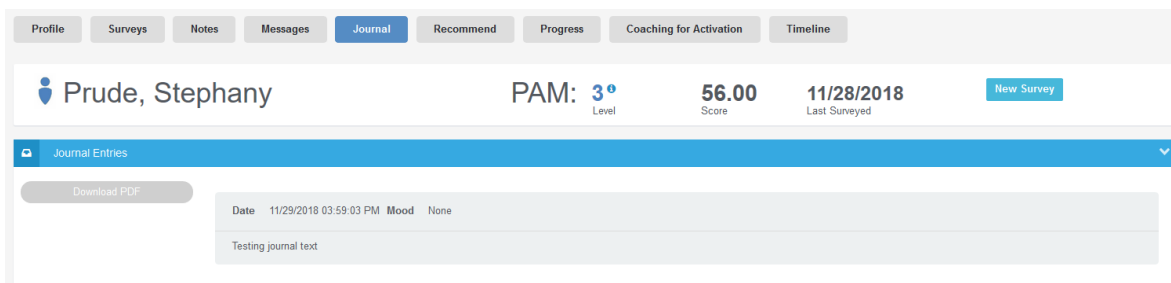


Figure 27. Individual Journal Entries

A Coach can recommend Flourish content, articles and videos to individuals. The Coach can preview the content and then recommend it. Once the individual has reviewed it, the content is marked as "viewed". On the consumer site, recommended

content is designated with a star badge. The Individual will also receive a notification message in their Message Center Inbox informing him or her of the recommendation and providing a link directly to the content.

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

Type	Status	PAM Level	Name
Video	Recommend	1	Asthma Action Plan
Article	Recommend	1	Asthma Medication Side Effects
Article	Recommend	2	Asthma Medications: Tricks of the Trade
Video	Recommend	1	Asthma: Myths About Inhaled Steroids
Video	Recommend	1	Asthma: The Importance of Controller Medicines
Video	Recommend	1	Asthma: Using an Inhaler and Spacer
Video	Recommend	1	Asthma: What Happens In Your Lungs
Article	Recommend	1	Benefits and Risks: It's a Balancing Act
Video	Recommend	1	Checking Peak Flow
Article	Recommend	2	Conquering Medication Side Effects
Video	Recommend	1	Dealing With Asthma Triggers
Article	Recommend	1	Go With the Flow: Peak Flow Meters
Article	Recommend	2	Help Remembering Your Asthma Medication

Figure 28. Recommend Content

You can review an Individual’s progress within Flourish. You can see challenges that are in progress, completed challenges, tracker data entries and individual article and video completions.

Type	Status	Program	Name
Article	Viewed	HealthcareTeam	Find the Right Doctor for You

Figure 29. Individual’s Progress

EDIT INDIVIDUAL INFORMATION

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

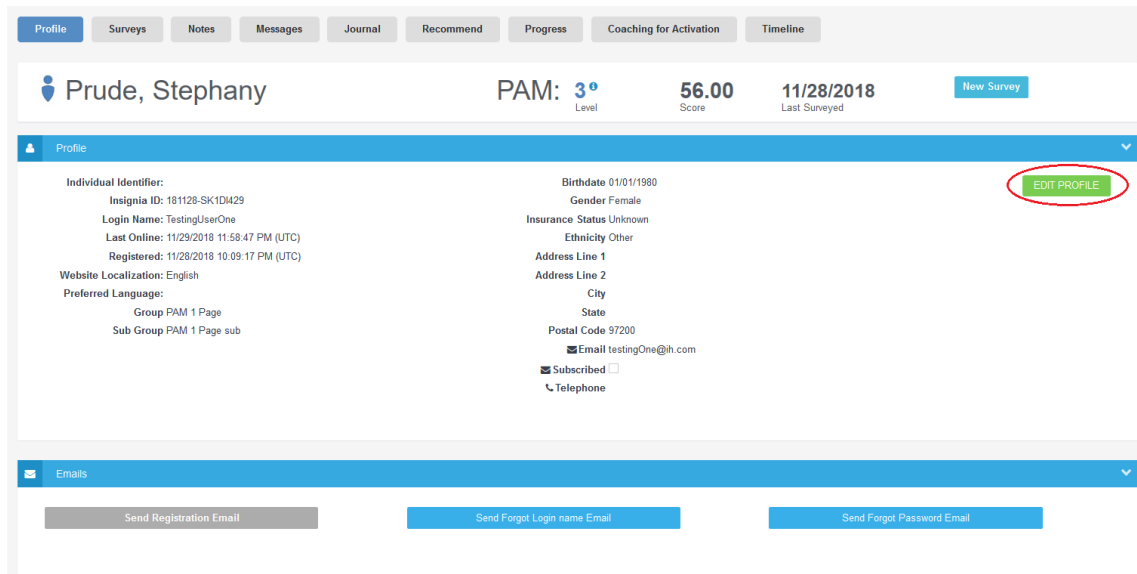


Figure 30. Edit Individual's information

The 'User Details' form is used for editing individual information. It features a blue header with a pencil icon and the text 'User Details'. The form contains several sections: 'Insignia Identifier : 180514-HGM5T3UZ', 'Select a Group and Sub Group' with a dropdown menu showing 'Default SubGroup', and 'Individual Identifier' with a search icon and the value '5689'. Below these are input fields for 'First Name' (John), 'Middle Name or Initial', and 'Last Name' (Doe). The 'Birthdate' section includes dropdowns for 'Select Month', 'Select Date', and 'Year'. The 'Gender' section has a 'Select a Gender' dropdown. The 'Ethnicity' section has an 'Other/Unknown' dropdown. The 'Preferred Language' section has an 'English' dropdown. There are also input fields for 'Postal Code', 'Telephone', and 'Email Address'. At the bottom of the form is a green 'Update User' button.

Figure 31. Edit Individual Information form

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.

SURVEY HISTORY

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

- Date completed;
- Survey type;
- Survey results;
- How survey was administered (Survey Delivery Mode column);
- How survey was entered into the system (Survey Mode column);
- Individual responses for each survey.

Date Completed	Survey Name	Survey Mode	Survey Delivery Mode	PAM Level	PAM Score	Details
3/17/2016 6:14:29 PM (UTC)	PAM10	Consumer	Online	2	52.90	Details Remove
6/17/2015 5:35:28 PM (UTC)	PAM10	Admin	Phone	4	90.20	Details Remove
6/8/2015 4:22:53 PM (UTC)	PAM10	Consumer	Online	2	52.90	Details Remove
3/20/2015 10:46:07 PM (UTC)	PAM10	Consumer	Online	4	79.20	Details Remove
3/20/2015 10:35:06 PM (UTC)	PAM10	Consumer	Online	4	90.20	Details Remove
3/19/2015 11:31:44 PM (UTC)	PAM10	Admin	Phone	1	40.90	Details Remove
3/19/2015 5:39:31 PM (UTC)	PAM10	Consumer	Online	1	42.90	Details Remove
3/18/2015 12:00:00 AM (UTC)	PAM10	API	iPad	3	59.30	Details Remove
3/13/2015 11:07:45 PM (UTC)	PAM10	Consumer	Online	2	50.00	Details Remove
3/5/2015 12:00:00 AM (UTC)	PAM10	Batch	Online	1	33.60	Details Remove

Figure 32. Survey History

To view individual responses for the previously taken survey, click the Details button for the 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 the 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 bulk upload process.

Profile | **Surveys** | Notes | Messages | Journal | Recommend | Progress | Coaching for Activation | Timeline

Prude, Stephany | PAM: **3** Level | **56.00** Score | **11/28/2018** Last Surveyed | [New Survey](#)

Survey Results

PAM:	3 Level	56.00 Score	11/28/2018 10:09:27 PM (UTC) Started Date	11/28/2018 10:09:43 PM (UTC) Entered Date	11/28/2018 10:09:43 PM (UTC) Completion Date
Survey:	PAM10_S Survey Name	English Language	System Entered By	Consumer Survey Mode	Online Survey Delivery Mode

Survey Response

Statement	Answer
When all is said and done, I am the person who is responsible for taking care of my health.	Disagree Strongly
Taking an active role in my own health care is the most important thing that affects my health.	Disagree
I know what each of my prescribed medications do.	Agree
I am confident that I can tell whether I need to go to the doctor or whether I can take care of a health problem myself.	Disagree
I am confident that I can tell a doctor concerns I have even when he or she does not ask.	Agree
I am confident that I can follow through on medical treatments I may need to do at home.	Agree
I have been able to maintain (keep up with) lifestyle changes, like eating right or exercising.	Agree Strongly
I know how to prevent problems with my health.	Agree Strongly
I am confident I can figure out solutions when new problems arise with my health.	Agree Strongly
I am confident that I can maintain lifestyle changes, like eating right and exercising, even during times of stress.	Agree Strongly

Figure 33. 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 list of recently created individuals on the dashboard;
- from the Individual Profile header displayed on all profile tabs;
- from the list of individuals displayed in a search result.

Figure 34. Administer Survey from Create Individual screen

Registered	Individual Identifier	First	Last	Last PAM Completed	PAM Level	PAM Score	# of PAMs	# of Pending	Coach	Action
05/11/2018 09:09:08 PM (UTC)		Mr	Freeze	05/14/2018 05:30:33 PM (UTC)	3	62.60	2	0	Demo2 Coach	Survey Profile Unassign
05/03/2018 05:27:18 PM (UTC)	CSLewis1234	Pat	Doe	05/01/2018 11:59:59 PM (UTC)	2	47.40	1	1	Admin User - Test First Name Admin User - Test Last Name, Demo2 Coach	Survey Profile Unassign

Figure 35. Administer a Survey from the Individual List on the Dashboard

Figure 36. Administer a Survey from Individual Profile

By PAM Level	PAM Score	First Name	Last Name	Insignia ID	Group	Subgroup	Individual ID
PAM Level: 4 PAM Score: 79.20 Registered Date: 09/21/2017 05:20:01 AM (UTC) Last PAM: 09/21/2017 07:50:05 PM (UTC)		Name: John Doe		Insignia ID: 170921-JB4XEJG	Group: CFA Demo Group 1	Sub Group: CFA Demo Group 1	Individual ID: 777700008766
PAM Level: 1 PAM Score: 45.10 Registered Date: 09/21/2017 05:21:31 AM (UTC) Last PAM: 09/22/2017 08:46:19 PM (UTC)		Name: John Doe		Insignia ID: 170921-3GEZWOT3	Group: CFA Demo Group 1	Sub Group: CFA Demo Group 1	Individual ID: 7765432

Figure 37. Administer a Survey from Search Result

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 38. Survey Administration

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

- Ensure the Survey Mode is set to "Paper";
- Select a survey type 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 Survey Mode to "Phone";
- Select a survey type 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 Survey Mode to "In Person";
- Select a survey type 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 Survey Mode 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 is stored in the profile, otherwise the field will be blank;
- Select a survey type from the drop-down menu;
- Select a language for the survey;
- Click the "Take a Survey Now" button.

The screenshot shows a user profile for Prude, Stephany (Individual Identifier: 71618) with PAM Level 3, a score of 65.80, and a last survey date of 07/06/2018. A 'New Survey' button is visible. Below this is a 'Survey Administration' section containing a 'New Survey' form. The form has two tabs: 'Administer Survey' (selected) and 'Schedule Future Survey'. It includes the following fields: 'Survey Mode' (set to 'Email'), 'Email' (testuser@insigniahealth.com), 'Select Survey' (set to 'PAM10'), and 'Survey Taken In' (set to 'English'). 'Submit' and 'Cancel' buttons are at the bottom.

Figure 39. Sending 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.

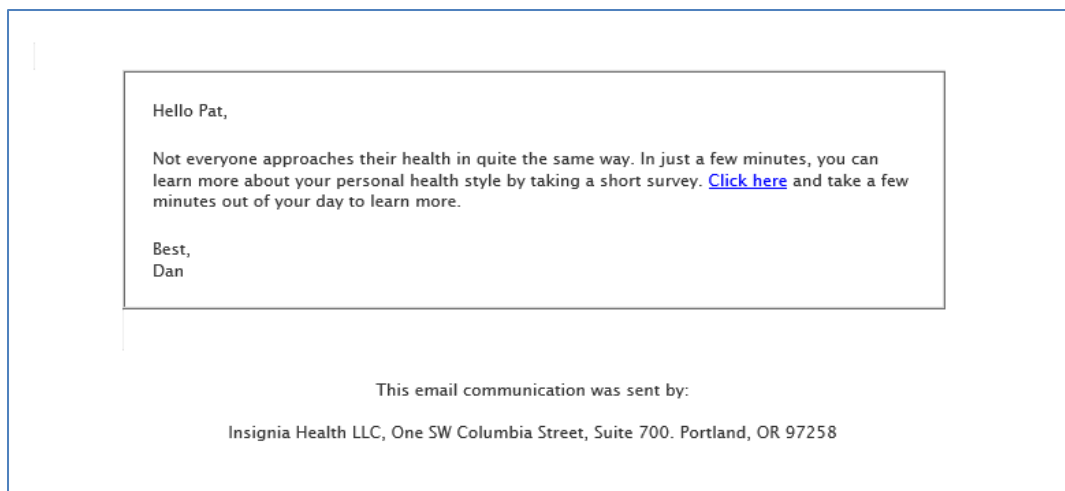


Figure 40. Email with a link to take PAM survey

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 web-page is designed to work on smart-phones, tablets and computers.

Figure 41. PAM survey displayed to individual

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

Figure 42. Example of the Health Style Report

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

The screenshot shows the profile of Prude, Stephany with a PAM Level of 3 and a score of 65.80. The 'Past Survey Results' table is as follows:

Date Completed	Survey Name	Survey Mode	Survey Delivery Mode	PAM Level	PAM Score	Details
07/06/2018 12:00:00 AM (UTC)	PAM10	PAMApp		3	65.80	Details Health Style Remove

Figure 43. Health Style Report via Surveys Tab

Until the individual takes the survey, it will remain in a pending state in their profile. More information about pending surveys is provided below in the **Cancel Pending Survey** section. If the individual cannot locate the initial email, there is an option for the user to resend the email to the individual.

The screenshot shows the profile of Prude, Stephany with a PAM Level of 3 and a score of 65.80. The 'Pending Surveys' section contains the following text:

This individual has a pending PAM10 English survey due by 11/29/2018, scheduled by Demo4 Admin.

Below this text are three buttons: 'Take this Survey', 'Cancel this Survey', and 'Resend survey email'. The 'Resend survey email' button is circled in red.

The 'Past Survey Results' table is as follows:

Date Completed	Survey Name	Survey Mode	Survey Delivery Mode	PAM Level	PAM Score	Details
07/06/2018 12:00:00 AM (UTC)	PAM10	PAMApp		3	65.80	Details Health Style Remove

Figure 44. Pending email survey with Resend option

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. PAM 10 currently has English - US, English - UK, Spanish – Mexico, Polish, Arabic and Urdu versions available. PAM 13 has English - US, English - UK, Spanish - Mexico, Polish, Arabic, Hindi, Tagalog and Urdu versions. 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.

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.

The screenshot shows the 'Survey Administration' interface for a user named Prude, Stephany. The user's profile information includes PAM Level 3, a score of 65.80, and a last surveyed date of 07/06/2018. The 'New Survey' form is active, with the 'Administer Survey' tab selected. The form fields are: Survey Mode (Paper), Select Survey (PAM10), Survey Taken In (English), and Completion Date (English). A dropdown menu is open for the 'Completion Date' field, showing a list of languages including English, Arabic, English - UK, Polish, Spanish - Mexico, Urdu, Bengali, Bulgarian, Chinese (Cantonese), Chinese (Mandarin), Chuukese, Creole (Haitian), Czech, Danish, Dutch, Filipino, Finnish, French, French Canadian, and German. The Insignia Health logo is visible at the bottom left, and a copyright notice '2018 © INSIGNIA HEALTH. ALL RIGHTS RESERVED.' is at the bottom right.

Figure 45. Survey Administration screen with Languages Selection

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 selected on individual profile, the system will look at the default language defined for your organization and it will be displayed as a default survey language.

If you are administering a survey by phone:

- Set switch control to "By Phone;"
- Completion date will automatically be set to the current day;
- Select a survey type from the drop-down menu;
- Select the language the survey is taken in;
- Click "Take a Survey Now" button.

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

- Ensure the switch control is set to "Paper;"
- Choose the completion date to indicate when this survey was administered;
- Select a survey type from the drop down list;
- Select the language the survey is taken in;
- Click "Take a Survey Now" button.

You will be presented with the Take a Survey page where you will need to enter all survey answers. Read the presented statements and response options to the patient and enter his or her responses.

Doe, Jane 170516-NPREE5BN | lestuser@insigniahealth.com | This survey is being taken in: English

Take a Survey > PAM10_S

Not everyone approaches their health in quite the same way. In just a few minutes, you can learn more about your personal health style by taking this short survey. It's that simple!

Questions 1-10

1. When all is said and done, I am the person who is responsible for taking care of my health.

Disagree Strongly	Disagree	Agree	Agree Strongly	NA
-------------------	----------	-------	----------------	----
2. Taking an active role in my own health care is the most important thing that affects my health.

Disagree Strongly	Disagree	Agree	Agree Strongly	NA
-------------------	----------	-------	----------------	----
3. I know what each of my prescribed medications do.

Disagree Strongly	Disagree	Agree	Agree Strongly	NA
-------------------	----------	-------	----------------	----
4. I am confident that I can tell whether I need to go to the doctor or whether I can take care of a health problem myself.

Disagree Strongly	Disagree	Agree	Agree Strongly	NA
-------------------	----------	-------	----------------	----
5. I am confident that I can tell a doctor concerns I have even when he or she does not ask.

Disagree Strongly	Disagree	Agree	Agree Strongly	NA
-------------------	----------	-------	----------------	----
6. I am confident that I can follow through on medical treatments I may need to do at home.

Disagree Strongly	Disagree	Agree	Agree Strongly	NA
-------------------	----------	-------	----------------	----
7. I have been able to maintain (keep up with) lifestyle changes, like eating right or exercising.

Disagree Strongly	Disagree	Agree	Agree Strongly	NA
-------------------	----------	-------	----------------	----
8. I know how to prevent problems with my health.

Disagree Strongly	Disagree	Agree	Agree Strongly	NA
-------------------	----------	-------	----------------	----
9. I am confident I can figure out solutions when new problems arise with my health.

Disagree Strongly	Disagree	Agree	Agree Strongly	NA
-------------------	----------	-------	----------------	----
10. I am confident that I can maintain lifestyle changes, like eating right and exercising, even during times of stress.

Disagree Strongly	Disagree	Agree	Agree Strongly	NA
-------------------	----------	-------	----------------	----

Submit

Cancel this Survey

Figure 46. Survey Example

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 by clicking “Submit,” the system will show you an error message for missing answers. You can also cancel the survey by clicking the “Cancel this Survey” button.

SURVEY RESULTS

After completing a survey, a screen with individual responses appears, showing details about the survey and a list of questions/statements along with responses. The Survey Details screen also 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 Flourish Admin. The enterer will say “System” if the survey was submitted from the API or survey batch upload process.

The screenshot displays the 'Survey Results' section for Prude, Stephany. At the top, the PAM score is 72.10 and the level is 3. The survey was completed on 11/29/2018. Below this, a table shows the survey details: PAM10, English, Demo4 Admin, Admin, and Paper. The main part of the screenshot is a table of survey responses with columns for Statement and Answer.

Statement	Answer
When all is said and done, I am the person who is responsible for taking care of my health.	Agree
Taking an active role in my own health care is the most important thing that affects my health.	Agree
I know what each of my prescribed medications do.	Agree
I am confident that I can tell whether I need to go to the doctor or whether I can take care of a health problem myself.	Agree Strongly
I am confident that I can tell a doctor concerns I have even when he or she does not ask.	Agree Strongly
I am confident that I can follow through on medical treatments I may need to do at home.	Agree
I have been able to maintain (keep up with) lifestyle changes, like eating right or exercising.	Agree
I know how to prevent problems with my health.	Agree Strongly
I am confident I can figure out solutions when new problems arise with my health.	Agree Strongly
I am confident that I can maintain lifestyle changes, like eating right and exercising, even during times of stress.	Agree Strongly

Figure 47. Survey Responses

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.

The screenshot shows the 'Survey Results' section for Prude, Stephany. A pop-up window titled 'PAM Level 3' is displayed, providing recommendations for this individual. The recommendations include:

- Has a good goal orientation
- Can connect health to long-term life goals
- Understands their health issues, treatment options, and self-care responsibilities
- Has experienced success in managing their health
- Can achieve guideline or best practice behaviors
- Feels positive about practicing healthy behaviors
- Functions as a partner with healthcare providers
- Has confidence handling various aspects of self-care
- Have difficulty maintaining healthy behaviors during times of stress or change

Below the list, it states: "For ideas on how to work with this individual, please review the Coaching for Activation application."

Figure 48. PAM Recommendations on the Survey Results page

SCHEDULE A SURVEY

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 he/she has access to the consumer site. The System will present a form where you will select a type of survey to be delivered, language and target date and then submitting the form.

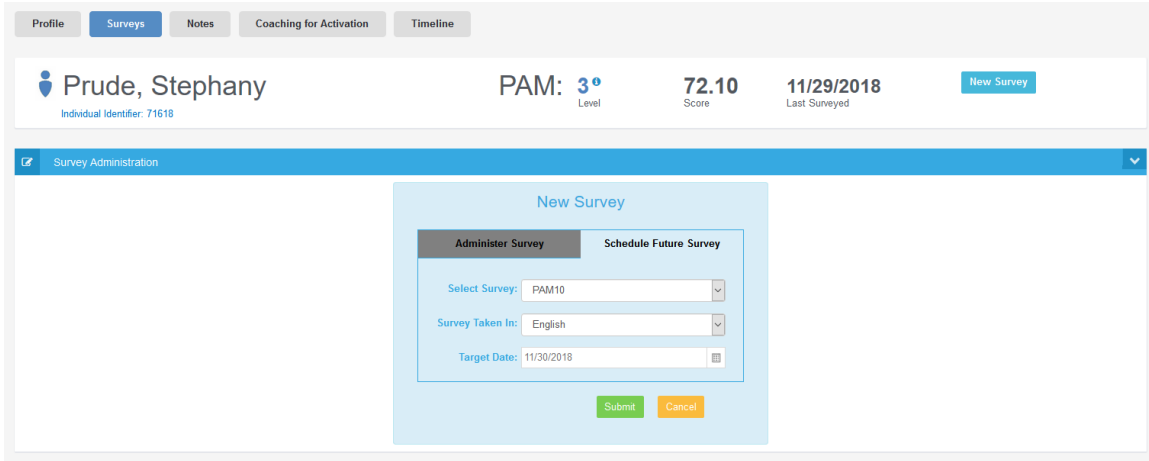


Figure 49. Schedule a Survey page

Individual Profile will show that there is a pending survey for the individual.

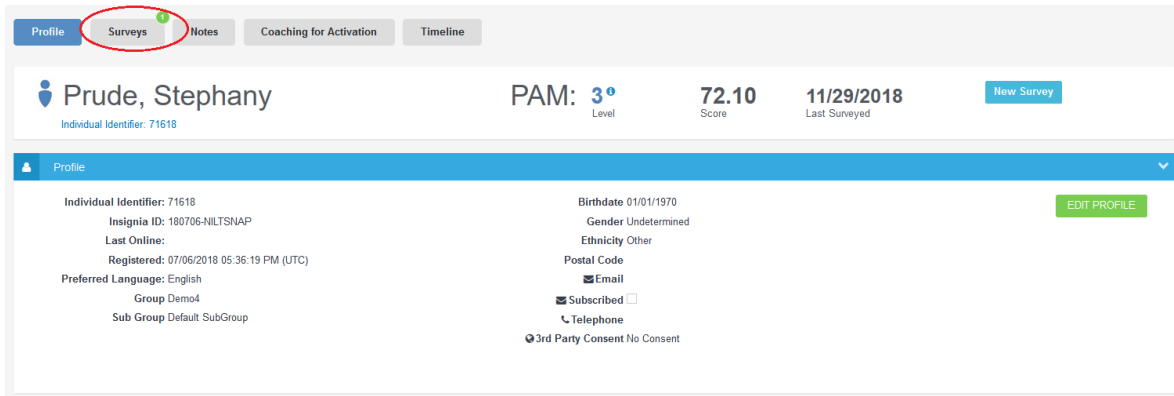


Figure 50. Individual Profile with Pending Survey

In addition to that, you will see a pending survey on the Surveys page.

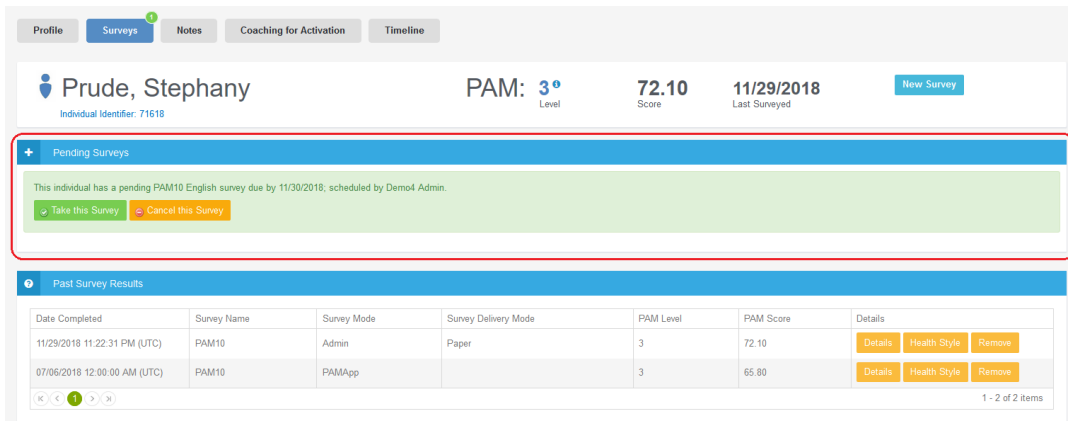


Figure 51. Pending Survey on the Surveys page

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 “Pending 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.

Scheduled By	Survey Type	Target Date	Individual Identifier	First Name	Last Name	PAM Date	PAM Level	PAM Score	Action
Test Hayley	PAM10	02/25/2019	DemoID1				N/A	N/A	Take Survey Profile
Unknown	PAM10	12/01/2018	Test112818			11/28/2018 07:39:54 AM (UTC)	2	50.00	Take Survey Profile
Unknown	PAM10	04/10/2018		Test	Testt	03/29/2018 12:54:40 PM (UTC)	3	65.80	Take Survey Profile
Unknown	PAM10	04/04/2018		Happy	Day	03/21/2018 09:29:15 PM (UTC)	3	72.10	Take Survey Profile
Unknown	PAM10	03/28/2018		Jane	Doe		N/A	N/A	Take Survey Profile
Unknown	PAM10	03/28/2018		Jamie	Meyerson		N/A	N/A	Take Survey Profile

Figure 52. Pending Surveys

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 today’s 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.

Profile Surveys Notes Coaching for Activation Timeline

Individual Identifier: DemoID1 PAM: 3^o Level 59.30 Score 02/21/2019 Last Surveyed [New Survey](#)

Survey Results

PAM:	3 ^o Level	59.30 Score	02/21/2019 10:19:05 PM (UTC) Started Date	02/21/2019 10:19:18 PM (UTC) Entered Date	02/21/2019 10:19:18 PM (UTC) Completion Date
Survey:	PAM10 Survey Name	English Language	Demo4 Admin Entered By	Admin Survey Mode	Online Survey Delivery Mode

Survey Response

Statement	Answer
When all is said and done, I am the person who is responsible for taking care of my health.	Agree
Taking an active role in my own health care is the most important thing that affects my health.	Agree
I know what each of my prescribed medications do.	Agree
I am confident that I can tell whether I need to go to the doctor or whether I can take care of a health problem myself.	Disagree
I am confident that I can tell a doctor concerns I have even when he or she does not ask.	Disagree
I am confident that I can follow through on medical treatments I may need to do at home.	Agree
I have been able to maintain (keep up with) lifestyle changes, like eating right or exercising.	Agree
I know how to prevent problems with my health.	Agree Strongly
I am confident I can figure out solutions when new problems arise with my health.	Agree Strongly
I am confident that I can maintain lifestyle changes, like eating right and exercising, even during times of stress.	Agree Strongly

Schedule next survey in 90 days

Figure 53. Schedule Survey from Survey Results Page

CANCEL PENDING SURVEY

Pending surveys that were scheduled manually through the Flourish Admin site can be canceled. To do so, you need to click “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 the “Cancel” button available.

REMOVE SURVEY

The Client Admins and Coaches can remove surveys that were entered through the Flourish Admin site. You will need to open an Individual Profile for the individual, 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.

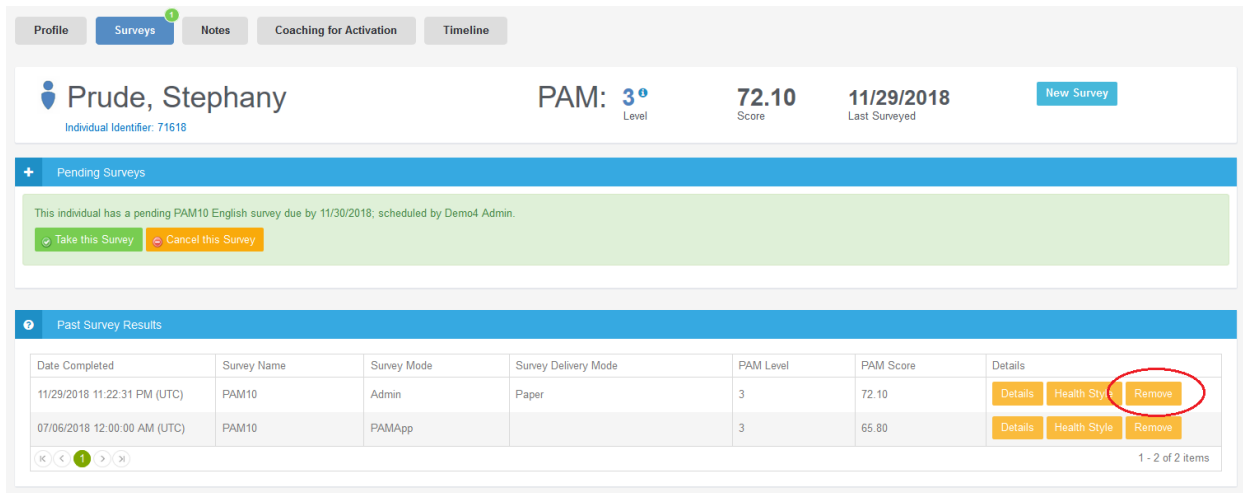


Figure 54. Remove Survey

PENDING SURVEYS

You can view all scheduled surveys for people that are in your groups and subgroups by clicking a menu item “Pending Surveys” on the left side menu.

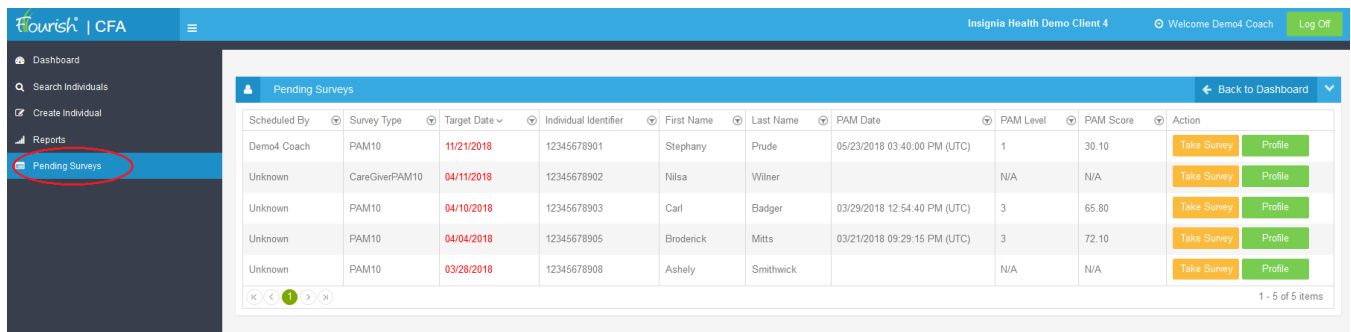


Figure 55. Pending surveys

Surveys past their target date that have not been initiated appear in red. To begin administering a survey that is pending, click “Take Survey” on the selected record from this list or click “Profile” and select the pending survey.

REPORTS

GENERAL REPORT FUNCTIONALITY

The Flourish Admin tool will provide the following reports to Coaches. Note that some Coaches may not have permission to see reports.

Report Category/ Report Title	Description	Availability
PAM Reports		
1. PAM Level Distribution	This report shows PAM level breakout of your population by numbers and percentage.	This report is available for all clients.
2. PAM Responses	This report presents an aggregate summary of survey responses of your population by question and answer, providing a count and percentage of each answer by question.	This report is available for all clients.

Report Category/ Report Title	Description	Availability
3. PAM Individual Data	This report provides PAM score and responses for individuals.	This report is available for all clients.
4. PAM Trend	This report shows changes in PAM levels over time.	This report is available for all clients.
5. Change within Levels	This report displays how a PAM score changes over time	This report is available for all clients
CFA Reports		
6. CFA Content Usage	This report shows CFA content usage by CFA programs.	This report is available to all Flourish Admin tool users of clients that have licensed CFA.
7. CFA Goals Usage	This report lists CFA goals that are "In Progress" or "Completed" for a given group/subgroup during a specified time period.	This report is available to all Flourish Admin tool users of clients that have licensed CFA.
8. CFA Steps Usage	This report shows a list of CFA steps that are "In Progress" or "Completed" for a given group/subgroup during a specified time period.	This report is available to all Flourish Admin tool users of clients that have licensed CFA.
9. CFA Resource Usage	This report shows a list of CFA resources that have been shared or viewed with the given population during a specific time.	This report is available to all Flourish Admin tool users of clients that have licensed CFA.
Health Assessment Reports		
10. HA Individual Data	This report provides HA responses for individuals.	This report is available only if your organization has Health Assessment survey or any other custom surveys besides PAM.
Population data Reports		
11. Population data	This Report shows the total number of individuals for the given population added to the system during a specified time.	This report is available to all clients.
Challenge Reports		
12. Challenge Data	This report shows the number of started and completed challenges by a given population and by their PAM level.	This report is available only if your organization is licensed for the consumer-facing Flourish site.

To view reports, select "Reports" from the left side menu. Reports are presented by categories: PAM Reports, Health Assessment Reports and Challenge Reports. Insignia will add more report categories over the next several months, such as Health Assessment survey reports, system utilization reports and others.

The screenshot displays the Flourish CFA dashboard interface. On the left is a dark sidebar with navigation options: Coaching For Activation, Dashboard, Search Individuals, Create Individual, Reports (highlighted), Groups & Subgroups, Survey Campaigns, Client Administrators, Group Administrators, Coaches, Uploads, and Client History. The main content area is titled 'Insignia Health Demo Client 2' and 'Welcome Admin User, 511'. It features three main report sections: PAM Reports, CFA Reports, and Population Data Reports. Each section contains several report cards with titles, descriptions, and 'Create Report' buttons. The PAM Reports section includes: PAM Level Distribution, PAM Responses, PAM Individual Data, PAM Trend, Change Within Levels, Outliers Report, and PAM Level Distribution by Coach. The CFA Reports section includes: CFA Usage, CFA Content Usage, CFA Goals Usage, CFA Steps Usage, and CFA Resource Usage. The Population Data Reports section includes: Population Data. Each report card shows a small preview of the report's content, such as charts or tables.

Figure 56. Flourish Reports

When you select a report, you will be presented with a screen to select report options. Report options can vary for different types of reports. Some reports can allow multiple selection of survey types using a different type of control than a drop down list. You can select more than one survey type by selecting the first one with a mouse and then pressing CTRL to select the next one.

This screen will also contain instructions and help text on how to generate the selected report.

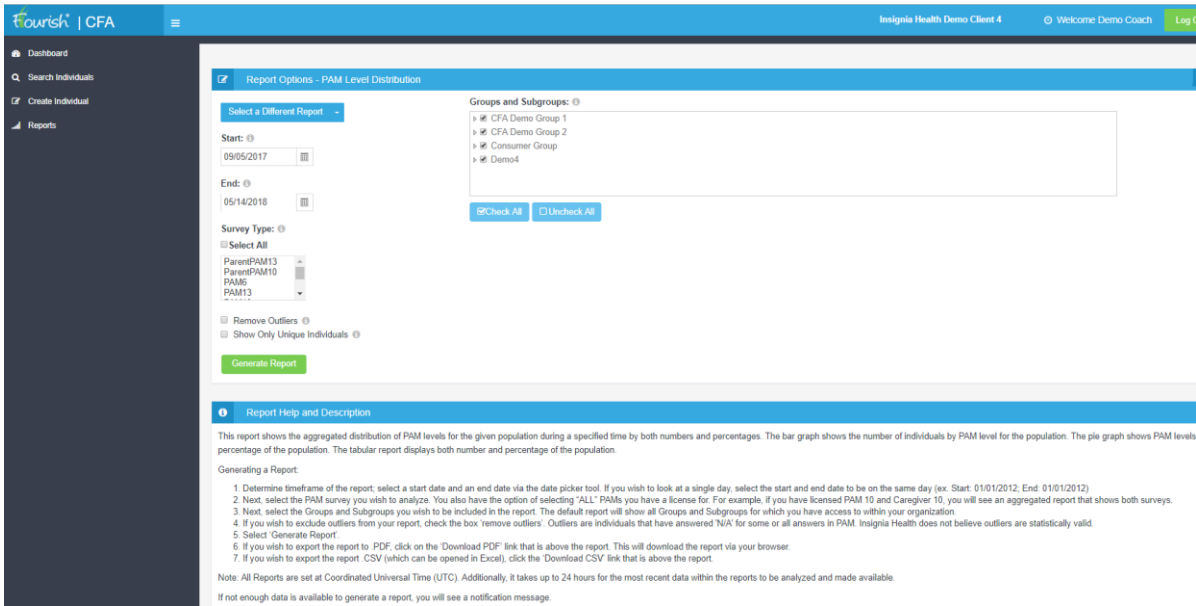


Figure 57. Report Options

When a report is generated, you will have an option to download it as a CSV file. Reports with charts will also have an option to download them as a PDF file. Selected report options will be displayed on the top, and the form for changing them is collapsed. To view the area where you can modify report options, click on the little arrow on the right side of the bar with the report title.



Figure 44. Expand to View Report Options

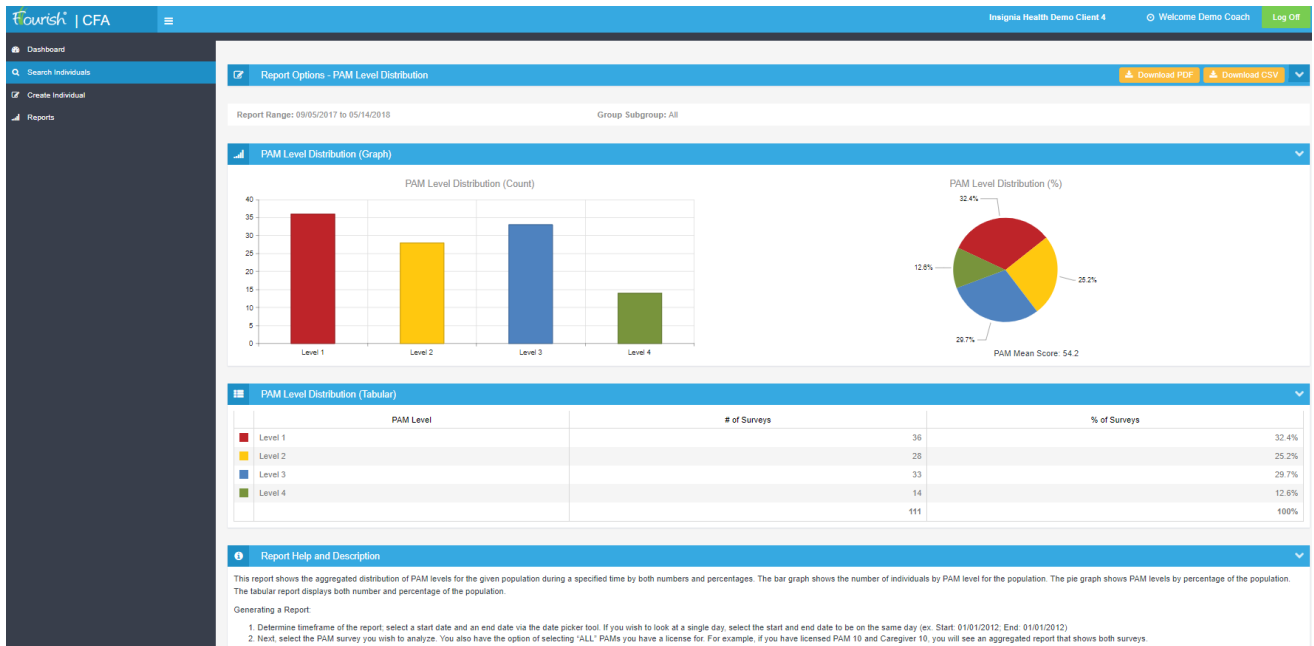


Figure 58. Report Example

PAM LEVEL DISTRIBUTION REPORT

The PAM Level Distribution report shows the aggregated distribution of PAM levels for the given population during a specified time. It also shows an average score for the selected population. This report can be exported to PDF and CSV files.

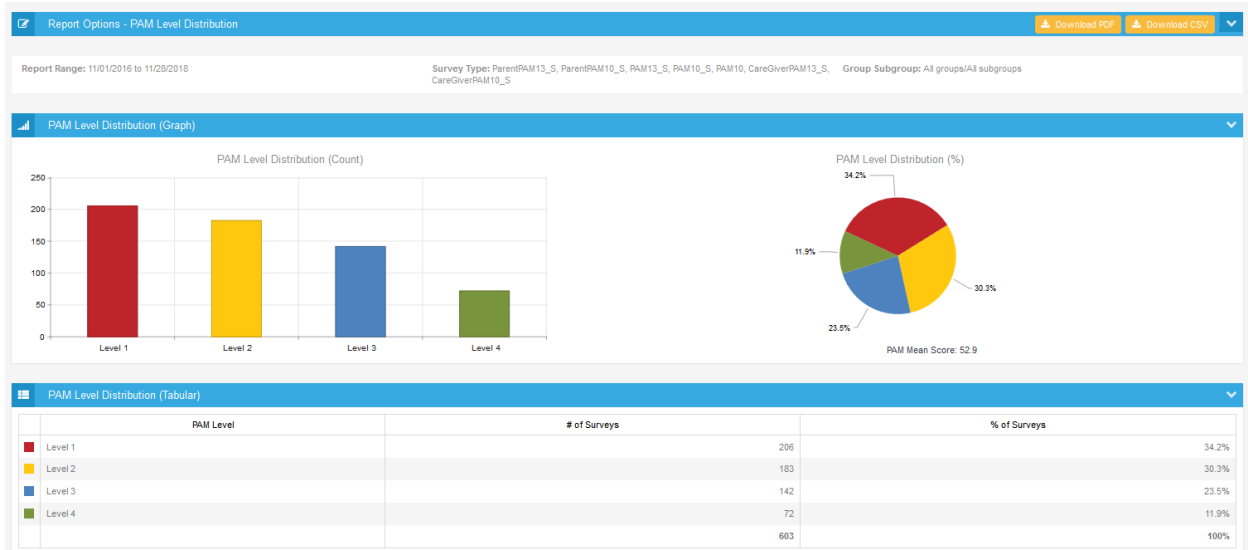


Figure 59. PAM Level Distribution report

PAM RESPONSES REPORT

The PAM Responses report shows the distribution of PAM survey answers for the given population. It shows the number and percentage of each answer by PAM statement. This report can be exported to PDF and CSV files.

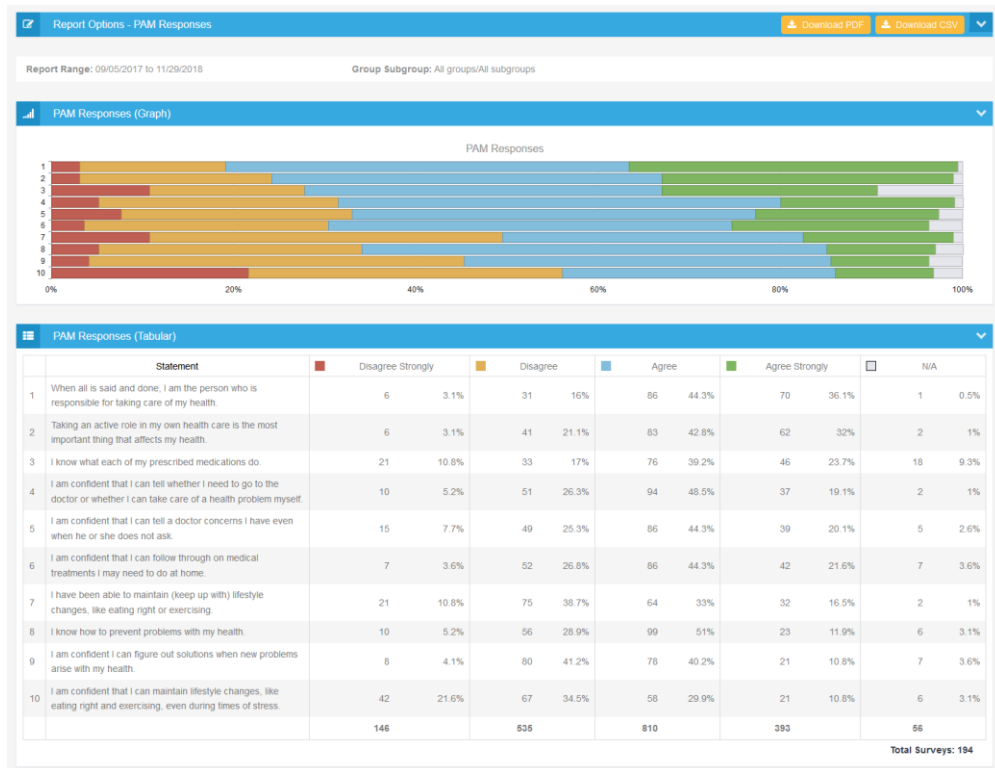


Figure 60. PAM Responses report

PAM TREND REPORT

The PAM Trend report shows PAM trending data over time. The goal of this report is to establish a baseline PAM level for your population and then show movement over time. The initial date that is selected in the report parameters establishes the

baseline PAM for the report. The number of PAMs selected and the end date of the report establishes the second level displayed on the report. This report can be exported to PDF and CSV-files.

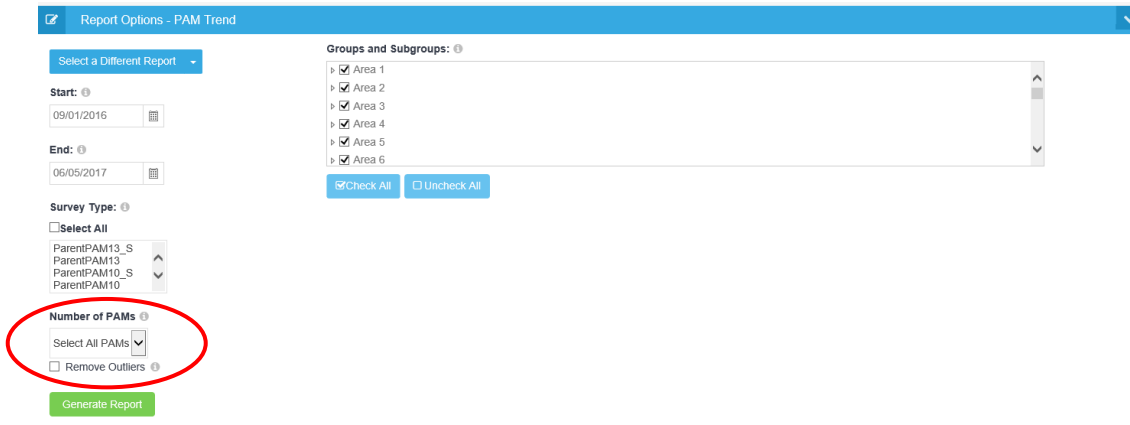


Figure 58. PAM Trend report - Options

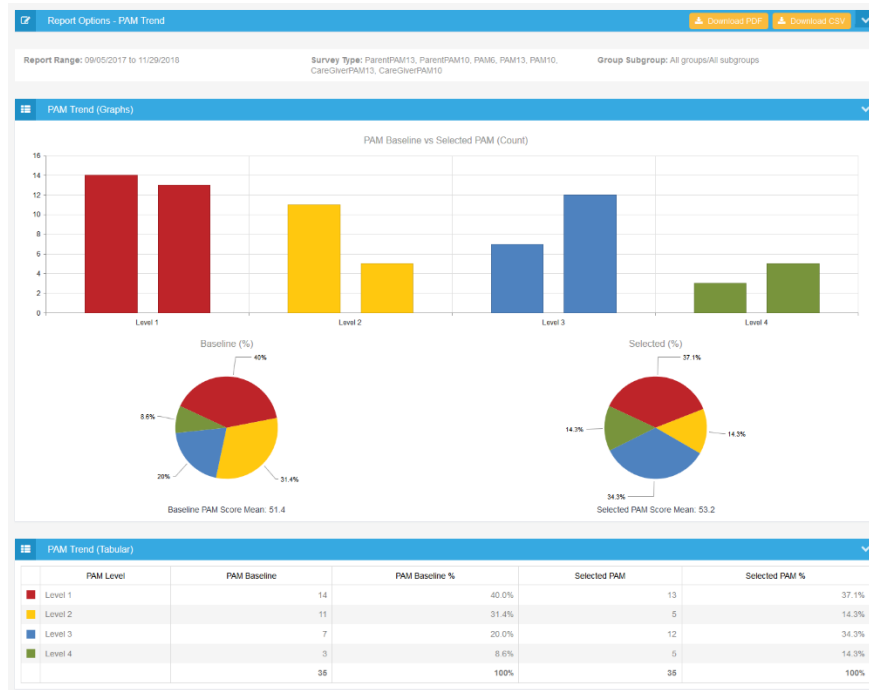


Figure 61. PAM Trend report

PAM INDIVIDUAL DATA REPORT

The PAM Individual Data report shows PAM data on an individual basis for the specified time period: score, level, survey type, completion date and PAM responses. This report allows you to look at an individual’s PAM levels and scores as well as when PAM was last completed. This report is available only for downloading as a CSV file and has a maximum output of 10,000 records. To see a full list of records beyond 10,000, you can adjust your date ranges.

You can choose to include coaches’ names by checking the box on the Report Options parameters page. You can also choose whether to include outliers by checking the box on the parameters page. If an individual has more than one PAM within the specified timeframe, you can choose to include only their most recent PAM by checking the “Show Only Unique Individuals” box on the parameters page.

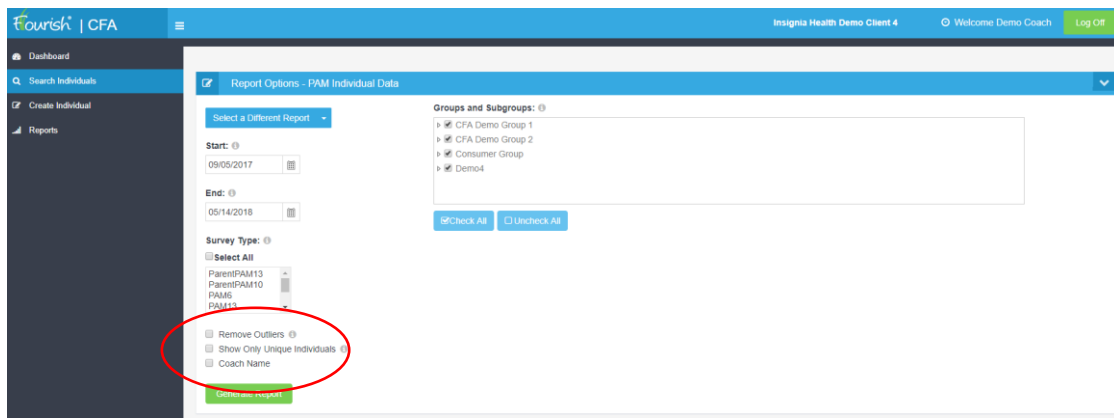


Figure 62. PAM Individual Data report - Settings

This report is available only for downloading as a CSV file.

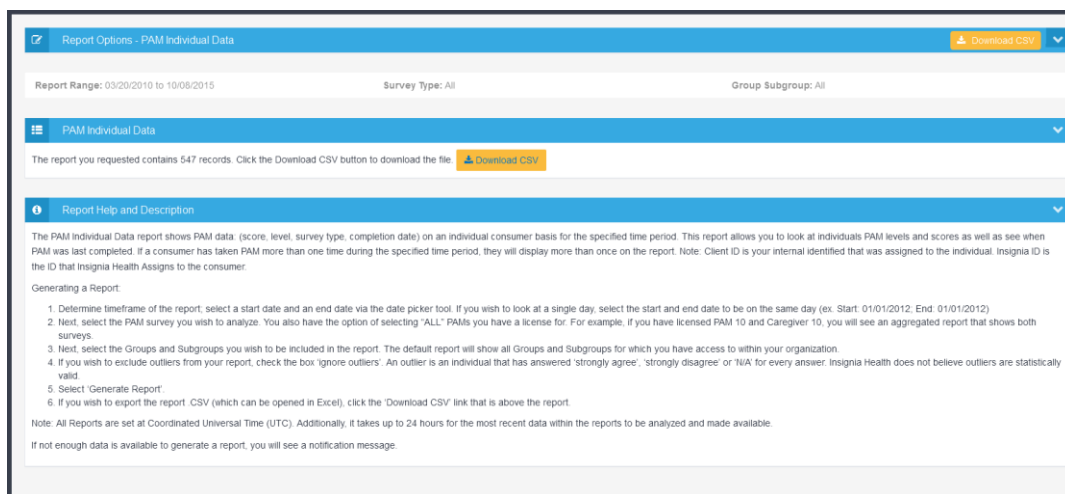


Figure 63. PAM Individual Data report

PAM CHANGE WITHIN LEVELS REPORT

The new "Change Within Levels" Report displays how a given Group's PAM score can change over time, and then measures what that change is. Often times individuals will have movement within their same level, and sometimes the score will move individuals within a Group out of their original PAM level into another level.

This report looks at the *mean* PAM score and *mean* point change for the group of individuals that were originally PAM 1, PAM 2, PAM 3 and PAM 4; even if some of these individuals moved into a different level at the next PAM administration in the timeframe.

Once you have selected criteria such as the timeframe (start and end date), groups and subgroups, and PAM versions, you will be presented with a report that shows initial level and mean score for the population. Subsequent PAM admissions show the change to the mean PAM score, the mean point change, and the percent declined, the percent unchanged and the percent improved from the same populations. For example, if there were 500 individuals that were PAM level 1 (with a mean score of 40.1) after initial PAM administration and then you re-administered PAM 6 months later, we would look at the changes to those 500 individuals even if all of them were no longer PAM 1 (some might have moved up to PAM 2).

Once generated, the report is available onscreen and as downloadable .pdf or .csv.

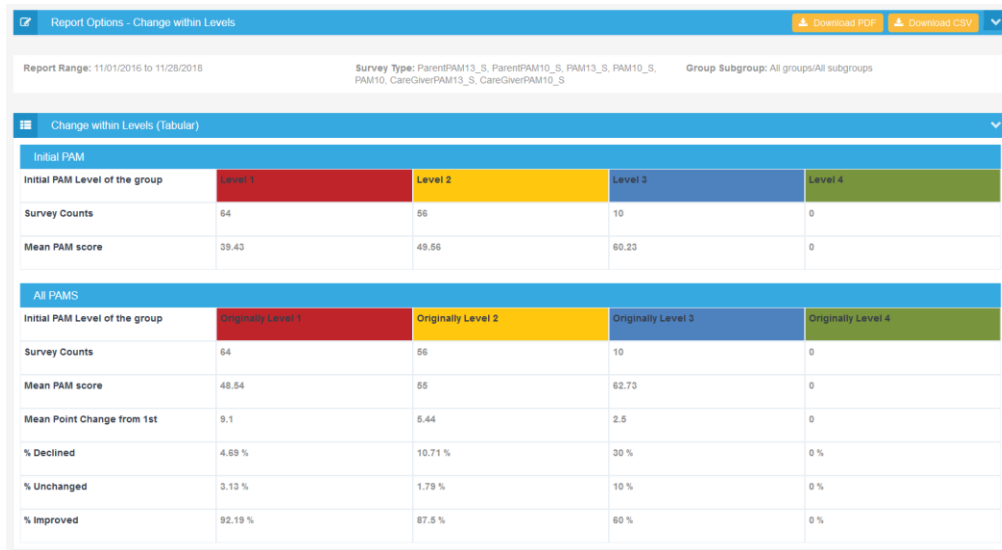


Figure 64. Change within Levels report

CFA CONTENT USAGE REPORT

The CFA Content Usage report shows the number of started (In Progress) and completed goals and steps for a given population for each CFA Condition Program. The bar graphs show the number of individuals in each CFA Condition Program that have started/completed a goal or step. The tabular report displays both the number of started and completed CFA goals and steps by the population. This report can be exported to PDF and CSV files.

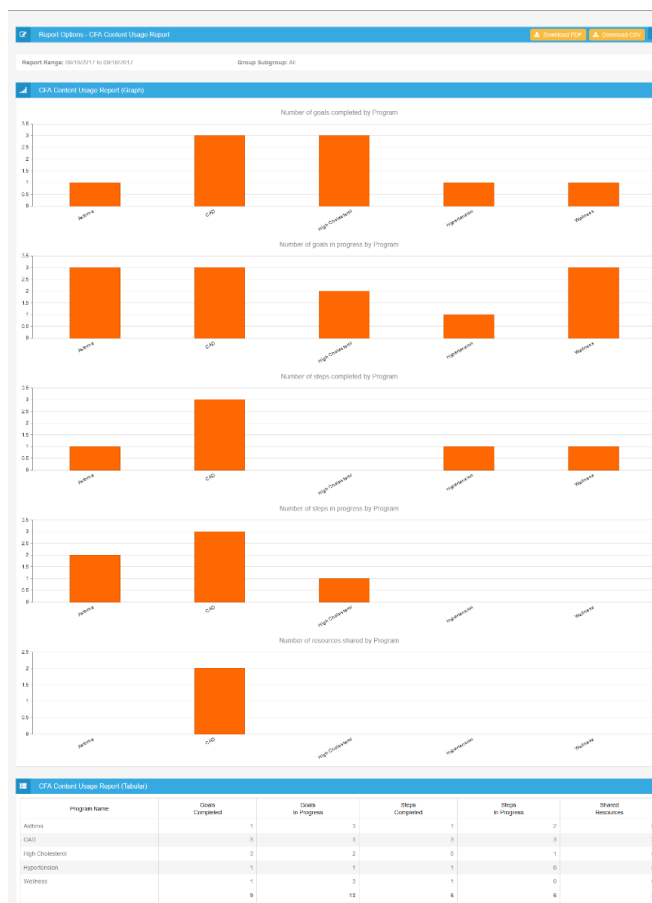


Figure 65. CFA Content Usage report

CFA GOALS USAGE REPORT

The CFA Goals Usage report lists CFA goals that are "In Progress" or "Completed" for a given group/subgroup during a specified time period. The list includes goal attributes including health program, PAM level and topic and goal name. The report displays the total number of times a goal was assigned and is sorted by the most popular goals.

This report is available only for downloading as a CSV file.

CFA STEPS USAGE REPORT

The CFA Steps Usage report shows a list of CFA steps that are "In Progress" or "Completed" for a given group/subgroup during a specified time period. The list includes step attributes, such as program, PAM level and topic, and also a parent goal. The report displays the number of patients that each step was assigned to and is sorted by the most popular steps.

This report is available only for downloading as a CSV file.

CFA RESOURCE USAGE REPORT

The CFA Resource Usage report shows a list of CFA resources that have been shared or viewed within the given population during a specified time. The list includes programs, PAM levels and topics in which a resource is used. The report displays the number of times each resources was shared and viewed, and is sorted by the most popular resources.

This report is available only for downloading as a CSV file.

POPULATION DATA

This report shows the total number of registered individuals for the given population during a specified time. Data that is shown in the report:

• Creation Date	• Group
• First Name	• Subgroup
• Last Name	• Last PAM Date
• Email Address	• Total # of PAM Surveys
• Individual ID	• Consumer Login Status
• Insignia ID	• Last Login Date

This report is available only for downloading as a CSV file.

HA INDIVIDUAL DATA REPORT

The HA Individual Data report shows health assessment (HA) data: survey type, completion date and all HA responses on an individual basis for the specified time period. This report allows you to look at individual's HA responses. This report can be exported to a CSV file.

CHALLENGE DATA

This report is available to clients that have licensed the consumer-facing Flourish platform from Insignia Health. The Challenge Completion report shows the number of started (Active) challenges and completed Challenges by a given population and by their PAM level. It also shows the most popular Challenge categories that have been completed.

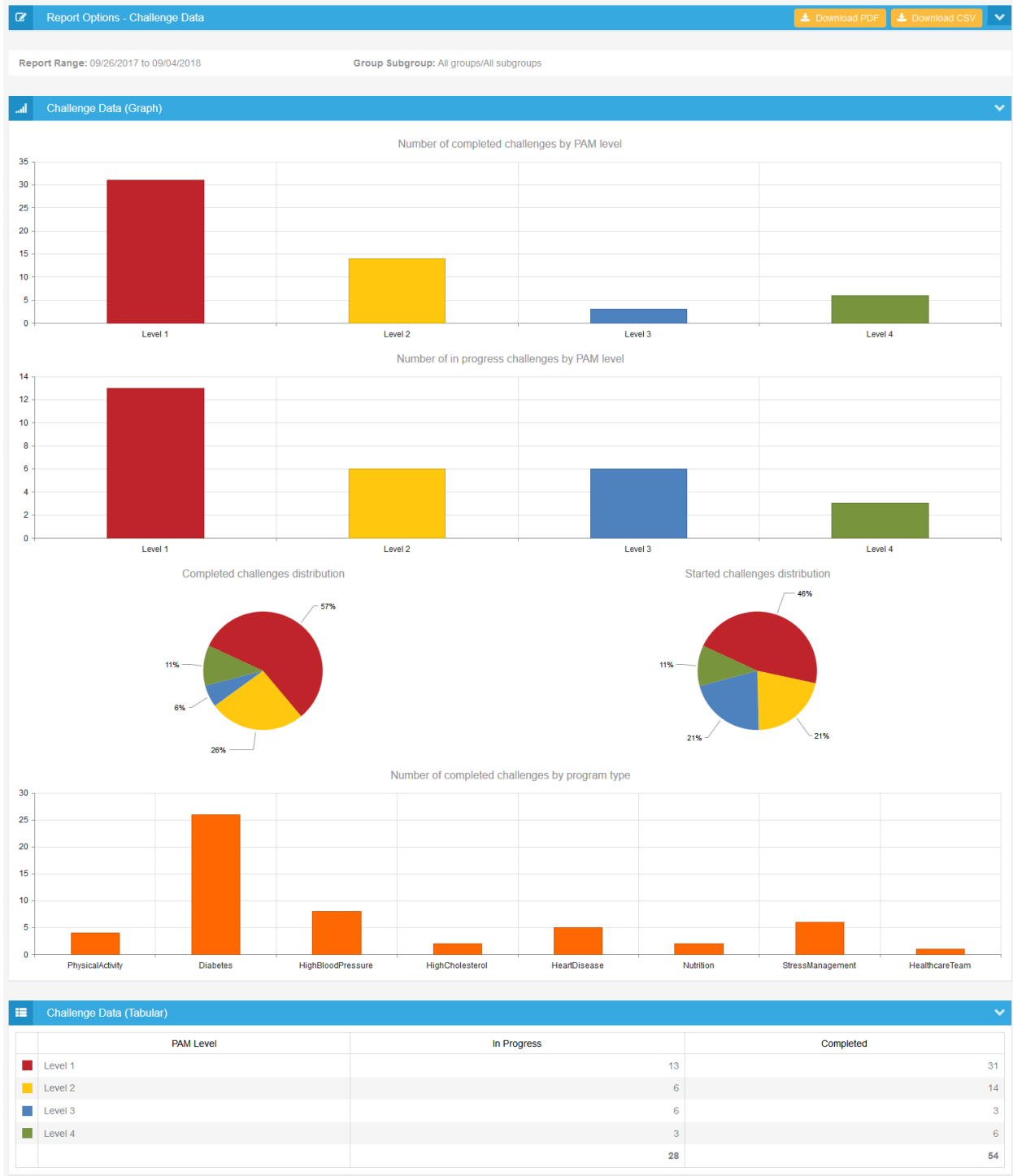


Figure 66. Challenge Data report

GLOSSARY

Insignia Health, IH	The company that developed the Flourish 2.0 platform.
Flourish 2.0	A tool that measures a patient's activation level through a self-registration process.
Flourish 2.0 Admin Tool	A tool that measures a patient's activation level, store patients' personal information and accumulates PAM measurements over time.
Admin Tool User	A person who has an account with Flourish 2.0 Admin Tool. It can be 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 2.0 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.
Client Admin	A role that can be assigned to an employee of an organization that has purchased a Flourish 2.0 product. This would be a person who is managing Coaches and their workload.
Individual	A person whose PAM level is measured by using Flourish 2.0 platform. This person may have access to the Flourish 2.0 user site, or his or her information is added to the Flourish 2.0 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 a 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 or statements designed to collect information from a certain population.
PAM Survey	A set of statements 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: <ul style="list-style-type: none"> - 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, they will be given a score of 51 and Level 2 - An individual answering 4 or more NA's with PAM 13, they will be given a score of 51 and Level 2 - An individual answering more than 2 NA's with PAM 6, they will be given a score of 51 and Level 2
Survey History	All surveys that individual has taken and that has been stored in the system.

INDEX

Access to tool, 7	Administer paper-based survey, 27, 31
Account, 10	Administer survey, 24
Dashboard, 8	Administer survey by phone, 27, 31
Naviagation, 9	Cancel Pending Survey, 35
Organization, 4	Remove Survey, 35
Password, 8, 10	Schedule Survey, 34
Rules, 6	Survey History, 23
Registration, 6	Unique Identifier
Reports	Insignia ID, 22
PAM reports, 36, 39, 43	Individual Identifier, 13
Search, 15	Individual, 11
Search Individual, 15	Individual Profile, 17
Survey, 24	Username, 8

HISTORY OF UPDATES

Date	What's new
January 19, 2018	<p>Added features for the January 2018 release:</p> <ul style="list-style-type: none"> - PAM recommendations for PAM level on User Profile and Survey Results; - updated screen shots with new User Profile header and Survey Results page; - new translations of PAM 13: Arabic, Hindi, Tagalog and Urdu; - new report "CFA Goals Usage"; - new client configuration for date format.
March 14, 2018	<p>Updated Survey Administration feature with added option to send PAM survey via email.</p>
May 22, 2018	<p>Added features for the May 2018 release:</p> <ul style="list-style-type: none"> - the term "User" has been changed to "Individual." Throughout the Admin site, all references to user (create user, search user, user ID, etc.) have been labeled "Individual"; - new report: "CFA Steps Usage"; - new report: "CFA Resource Usage"; - new "Resend Survey Email" function - Individual's 'Health Style' Report added to survey results screen.
July 12, 2018	<p>Added features for the May 2018 release:</p> <ul style="list-style-type: none"> - added new languages to PAM 10; - added a missing section for Population Data report.
November 29, 2018	<p>Changes for the November 2018 release:</p> <ul style="list-style-type: none"> - modifications to the Administer Survey form to add Schedule Future Survey; - changed "Take a Survey" button on the profile to "New Survey" to address that the form can also be used for scheduling survey, not just entering; - added a new menu item and Pending Surveys screen; - updated screen shots for reports to reflect correct PAM level colors.