

Insignia Health

PATIENT ACTIVATION MEASURE® (PAM®) SURVEY APPLICATION MANUAL

SMART ON FHIR APPLICATION - MARCH 2020 RELEASE



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PURPOSE

Flourish Administrators can use this manual to learn how to administer the Patient Activation Measure[®] (PAM[®]) Survey on the Flourish[®] Platform (SMART on FHIR application). This manual also covers general functionality, typical workflow scenarios, and setup instructions.

INITIAL SETUP

To use the PAM Survey on the Flourish Platform you will need to have an active organization configured in Flourish Admin. Please contact Insignia Health if you do not currently have an active organization configured.

The PAM Survey on the Flourish Platform is available on the Epic App Orchard for download into your native Epic system.

EPIC APPLICATION DOWNLOAD AND SETUP

To set up the PAM Survey Application in your native Epic system:

- 1. Visit the Epic App Orchard <u>https://apporchard.epic.com/</u>
- 2. Log into your Epic App Orchard account
- 3. Select the "Explore Apps" link in the top navigation bar
- 4. Search for "Insignia Health" or "Patient Activation Measure® (PAM®) Survey" in the "Search" bar
- 5. Select the "Patient Activation Measure® (PAM®) Survey" application
- 6. Select the "Contact author" button
- 7. Insignia Health will provide you with access to download the PAM Survey application
- 8. The PAM Survey Application icon will appear in your Epic environment. Select the icon to access the application.

FUNCTION DESCRIPTIONS

ACCESSING THE APPLICATION

SIGN IN

You will automatically be signed into the application upon signing into your computer and selecting the PAM Survey application icon within your Epic system

SIGN OUT

If you leave the application open, your session will time out in 15 minutes and you will be signed out of the application automatically. Otherwise, you will be signed out of the application upon closing the application.

GENERAL FUNCTIONALITY

PAM OVERVIEW & ACTIVATION LEVELS

After clicking on the PAM Survey icon within your Epic system, the PAM Survey application will open and you will be directed to the PAM Survey Overview screen that includes:

- 1. Patient ID number;
- 2. Brief overview of the PAM survey;
- 3. "Take Survey" button;
- 4. PAM Activation Level descriptions;
- 5. "Terms and Conditions" link; and
- 6. "Privacy Policy" link.

	flourish PAM"Su	rvey			
	PAM® OVERVIEW				
_	The Patient Activation Measure skills and confidence for effecti four activation levels along a 10	P (PAM®) survey assesses an indiv ve health self-management. PAM 0-point empirical scale.	ridual's underlying knowledge, segments individuals into one of	TAKE SURVEY	
	Each point and level provides in motivators, and behaviors. Lowe confidence in managing health skills and resilience in times of s	sight into health-related character er activation indicates a lack of un issues, while higher activation sug stress or change.	ristics, including attitudes, derstanding and low self- gests stronger self-management	t	
	PAM® ACTIVATION LEVELS				
	Level 1	Level 2	Level 3	Level 4	
	DISENGAGED AND OVERWHELMED	BECOMING AWARE BUT STILL STRUGGLING	TAKING ACTION AND GAINING CONTROL	MAINTAINING BEHAVIORS AND PUSHING FURTHER	
	"My doctor is in charge of my health."	"I could be doing more for my health."	"I'm part of my health care team."	"I'm my own health advocate."	
	Individuals are passive and lack confidence. Knowledge is low, goal-orientation is weak, and adherence is poor.	Individuals have some knowledge, but large gaps remain. They believe health is largely out of their control, but can set simple goals.	Individuals have the key facts and are building self-management skills. They strive for best practice behaviors, and are goal-oriented.	Individuals have adopted new behaviors, but may struggle in times of stress or change. Maintaining a healthy lifestyle is a key focus.	
	Healthcare utilization: Very high ED/ER use, very high risk of Ambulatory Care Sensitive (ACS) utilization, very high risk of readmission, very low use of	Healthcare utilization: High ED/ER use, high risk of ACS utilization, high risk of readmission, low use of preventive care and screens.	Healthcare utilization: Low ED/ER use, low risk of ACS utilization, low risk of readmission, good use of preventive care and screens.	Healthcare utilization: Very low ED/ER use, very low risk of ACS utilization, very low risk of readmission, very good use of preventive care and screens.	

Figure 1. PAM Survey Overview

PAM SURVEY ADMINISTRATION

To administer a survey within the PAM Survey Application on the Flourish Platform, select the "Take Survey" button in the top right-hand corner of the PAM Overview page. You will be redirected to the PAM Survey administration page where you will need to select the PAM survey name, survey language, and survey completion date.

PATIENT# 62acbbe9-7bae-	ld33-b53f-a389c1a0e281	CANCEL
Flourish	PAM [®] Survey	
PAM® SURVEY		
	 Please select the survey you wish to administer. Please select the survey language in which you would like the survey displayed. Please select the survey completion date for when the survey was administered. Note: If at any time during survey administration, you wish to change the survey or language, you will be required to restart the survey from the beginning 	
	Survey Name: PAM10 Survey Language: English (English) Survey Completion Date: Feburary 19 2020 BEGIN SURVEY	

Figure 2. PAM Survey Administration

The PAM survey is translated in multiple languages, including English, English (UK), Arabic, Polish, Spanish (Mexico), and Urdu. The number of translated surveys will continue to 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.

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

PAM SURVEY

Once you set your survey name, survey language, and survey completion date, select the "Begin Survey" button. Question 1 will appear and you will be prompted to select one of the five responses. After you select a response, the second question will appear. Continue to answer the questions until all 10 (or 13) questions are answered.

PATIENT# 62acbbe9-7bae-4d33-b53f-a389c1a0e281	CANCEL
Flourish PAM* Survey	
PAM® SURVEY	
 Please select the survey you wish to administer. Please select the survey language in which you would like the survey displayed. Please select the survey completion date for when the survey was administered. Note: If at any time during survey administration, you wish to change the survey or language, you will be required to restart the survey from the beginning 	
Survey Name: PAM10	
Survey Completion Date: Feburary 19 2020	
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!	
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	
Progress	1/10
Figure 3. PAM Survey	

After answering all of the questions, select the "Submit" button to complete the survey. You can cancel the survey at any time by clicking on the "Cancel" link in the upper right-hand corner of the screen. The "Submit" button will not be displayed until all questions have been answered.

PAM SURVEY RESULTS

After selecting the "Submit" button on the previous page, the PAM Survey Results screen will appear. On the PAM Survey Results screen you will see:

- 1. PAM Level and description;
- 2. PAM Score;
- 3. Survey Details;
- 4. "Copy Score" and "Copy Level" links; and
- 5. All survey questions and responses.



Figure 2. PAM Survey Results

You will automatically see the PAM level, score, and level details associated with the PAM survey that was just completed. You can select any of the other multi-colored PAM Level tabs at any time to view descriptions of the other levels. Once you select the "Done" link in the top right-hand corner of the page you will be redirected to the PAM Overview page.

PAM OVERVIEW WITH ONE SURVEY COMPLETED

Once an individual has completed a PAM survey, the PAM level and score will be displayed on the PAM Overview screen.



Figure 5. PAM Survey Overview

PAM OVERVIEW WITH MULTIPLE SURVEYS COMPLETED

Once an individual has completed two or more PAM surveys, the Score History Graph will be displayed. On this graph, you will be able to view all aggregate scores and levels for the individual's combined responses over time.

AM® OVERVIE	w															
The Patient Ac management.	ctivation Mea PAM segmen	sure® (PAM nts individua	») survey ass ils into one of	esses an indi four activati	vidual's unde on levels alor	erlying knowle ng a 100-poin	edge, skills ar t empirical so	nd confidence cale.	e for effectiv	e health self		TAKE SURVE	Y			
Each point and a lack of unde resilience in ti SCORE HISTOR	d level provic rstanding an imes of stres IY GRAPH	les insight in d low self-co s or change.	nto health-rei onfidence in r	ated characte managing hea	eristics, inclu Ilth issues, w	uding attitude rhile higher ar	s, motivators ctivation sugg	, and behavio gests stronge	rs. Lower ac r self-manag	tivation indic jement skills	and					
This chart sho	ws the aggre	egate score i	and level from	n the individu	al's combine	ed responses	over time.									
2017				2018				2019				2020				Level 4 (
												$\overline{}$				Level 3
-																Level 2
31.9																
$\overline{}$																Level 1 (
State of Sta	h _o	ya,	Grand and a start of the start	DIA.	Ťo _l	y ₃₃	Grand Street	D10	ħ _p	y _{yy}	Contraction of the second	₹\$ _{\$}	They	yyh	Q. Ala	

Figure 6. PAM Survey Overview

You will also have the ability to view all Score History Data in a table format where you can find the PAM Survey completion date, PAM level and score, and the name of the person who administered the PAM survey to the individual across time.

At any time you can select one of the multi-colored level tabs to see the level description in a popup window.



Figure 7. PAM Level Description

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.

Terms and Conditions
The Terms and Conditions of Use ("Terms") were last updated on April 10, 2019 (the "Revision Date").
PLEASE READ THESE TERMS AND CONDITIONS CAREFULLY BEFORE USING THIS APPLICATION.
Please reference and review the Terms on a regular basis as they constitute a legally binding agreement between you and insignia Health and have important consequences on your legal rights and obligations. The terms apply to all insignia Health websites and web-based applications including, but not limited to, the PAM® assessment and Flourish®(the "Site").
By accessing or using this Site, you agree to the Terms that govern usage of the Site. It is your responsibility to read and understand them. If you do not agree with the Terms, do not use the Site.
Insignia Health ("Insignia Health" or "we", "us", or "our") may, without notice, revise and update the Terms at any time and such updated Terms will apply to your use of the Site effective as of the Revision Date. Such revisions and updates will be indicated by a change in the Revision Date listed above. Your continued use of the Site means that you accept the updated Terms.
The information on the Site, including any data, graphics, or other material transmitted through or residing on the Site regardless of its nature, form, or source (the "Content") is of a general nature and is intended for informational purposes only.
If you violate any of the Terms, your permission to access the Site and use the Content automatically terminates and you must immediately destroy any copies of the Content that you have made or possess.
Access to Site and Subscription
Insignia Health provides access to some information on the Site without the need to register. However, we condition your access and use of certain functionalities provided by the Site, Including but not limited to access to its FAAM* assessment and Flourish*, on your completion of the registration process. (Registration Process*). During the Registration Process, you will be provided with a usersame and password. Yow all be required to entry you usersame and password to access the Site.
Your username and password are personal to you. You are responsible for maintaining the confidentiality of the username and password and are fully responsible for all activities that occur under your username and password. You may not allow anyone elso to use your urearmame and password, nor use anyone else's username or password, at any time. You agree to immediately notify or of any wandhrinder use of your username, password, account, or any other hereach of security.
Insignia Health will not be liable for any loss that you may incur as a result of someone else using your username, password, or account, either with or without your knowledge. However, you could be held liable for losses incurred by Insignia Health, its Affiliates, or any other party due to someone else using your username, password, or account.
Insignia Health may, in its sole discretion, terminate your username, password, account, and/or access to the Site without prior notice to you. It is not liable to you or any third party for

Figure 8. Terms and Conditions

GLOSSARY	
Individuals	A person whose PAM level is measured by using the Flourish platform. Individuals can be patients, primary caregivers to patients, parents of a patient or employees of an organization.
РАМ	Patient Activation Measurement, an assessment that gauges the knowledge, skills and confidence essential to managing one's own health and healthcare.
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.