

# Flourish:

## New user introduction



Are you new to Flourish? Don't worry—we've got you covered! Use this guide to understand the basics of Flourish, including how to register new users and navigate the dashboard.

## What is Flourish?

Flourish is a digital platform anchored by the Patient Activation Measure® (PAM®). It was developed by Insignia Health, a Phreesia company. Healthcare organizations use Flourish to:

1

### **Schedule and organize PAM surveys**

Schedule and administer the PAM, Caregiver PAM and Parent PAM in multiple versions and languages, either immediately or on a specified date.

2

### **Manage patient workflows**

Assign PAM surveys, view the history of a patient's PAM scores and levels, and log call notes and patient interactions.

3

### **Tailor health education and support**

Use the Coaching for Activation (CFA) tool to view goals, action steps and resources based on patients' PAM activation level and health condition to help them build their self-management capabilities.

4

### **Analyze patient population and subgroup data**

Access real-time activation analytics and view PAM results through pre-configured reports. Then, easily download the data for additional analysis.



## Roles and responsibilities

Flourish was built on a role-based infrastructure that enables specific functions to be turned on or off depending on the access level of each user.

There are three types of users: **Coach**, **Group Administrator** and **Client Administrator**.

<b>COACH:</b> Lowest level of access	<b>GROUP ADMINISTRATOR:</b> Moderate level of access	<b>CLIENT ADMINISTRATOR*:</b> Highest level of access
Coaches can: <ol style="list-style-type: none"><li>1. Access the Knowledge Center and CFA tool</li><li>2. Schedule and administer PAM surveys</li><li>3. View individuals within accessible subgroups</li><li>4. Unassign/reassign individuals to other users (subject to settings)</li><li>5. View and download reports (subject to settings)</li></ol>	Group Administrators can do everything a Coach can do, as well as: <ol style="list-style-type: none"><li>1. Manage Coach access</li><li>2. View individuals across the whole group and create/add/edit subgroups</li></ol>	Client Administrators can do everything a Group Administrator can do, as well as: <ol style="list-style-type: none"><li>1. Manage Group Administrator access</li><li>2. Deny access to individual users</li><li>3. Create, add and edit subgroups</li></ol>

**\*Note:** For select accounts, there may also be a Limited Client Administrator role option. It resembles the Client Administrator role but does not grant access to individual data. That means Limited Client Administrators cannot add individuals, search for individuals or run individual data reports.

## Registration process

Registration is required to access the **Flourish Administrative Portal**.

- An Insignia/Phreesia Health Administrator will create an account for the first Client Administrator in your organization and send an automated “welcome” email to their inbox.
  - After receiving the email, the first Client Administrator can create additional Client or Group Administrators.
- Each new Flourish user will receive a welcome email with a link to complete the registration process and choose a username and password.
  - The password must be between 8-16 characters long and include at least one uppercase letter, one lowercase letter and one number.
- After registration is complete, each user will receive an email confirmation with their username, the URL of the Flourish site and a link to reset a lost password. **Do not delete this email.**





Dear Demo2,

Thank you for registering with the Flourish Administrative Portal.

Please keep this email for future reference.

Your Username is Demo2Coach

Forgot your password? Request it [here](#).

The URL for the Flourish Administrative Portal is: <https://admin.insigniahealth.com>

Sincerely,  
Insignia Health



**Tip:** When you log into Flourish for the first time, bookmark the URL in your browser for future reference!

- **What happens if I forget my username?** Click the “Forgot Your Username?” link on the Flourish login page and enter the email address you used to register your account. This should trigger an email to be sent to your inbox with your username.
- **What happens if I forget my password?** Click the “Forgot Your Password?” link in the Flourish login page and enter your username on the form. You will receive an email with a link to reset your password.

**Note:** Three unsuccessful login attempts will launch additional security checks and allow for two more attempts. After that, you will be locked out of Flourish and will need to email your Phreesia account representative to regain access.

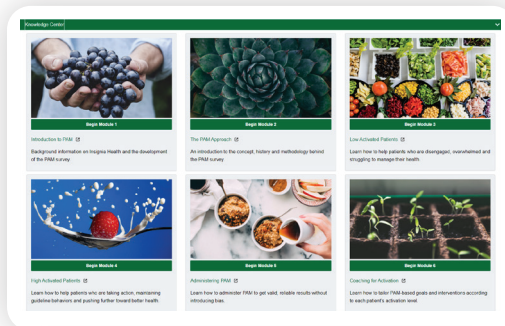
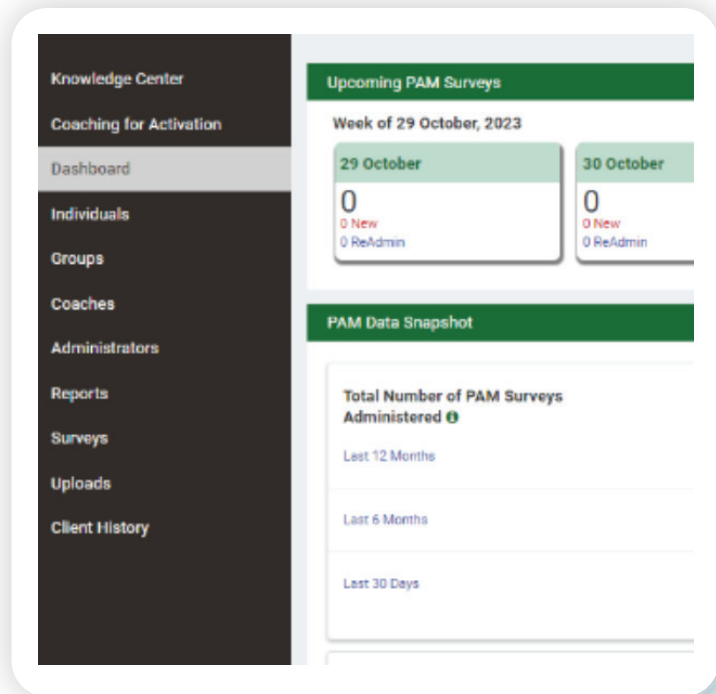
## Navigating the dashboard

The Flourish Administrative Portal dashboard is updated in real time and contains a variety of reports based on PAM survey results, including:

- ✓ Total number of surveys administered in the past year, the past six months and the past 30 days
- ✓ Number of coaches or other staff actively administering PAM
- ✓ Survey re-administration rate among total individuals
- ✓ Aggregated PAM level distribution and average PAM score change

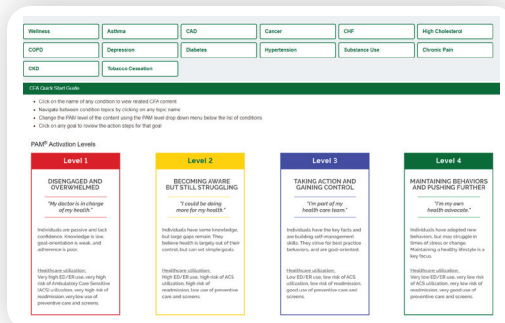
To the left of the dashboard, you'll see a menu bar.

**Note:** Some features are only accessible to Client Administrators. The dashboard will look different to Coaches and Group Administrators.



## Knowledge Center

The Knowledge Center houses six e-Learning modules. Users can access the modules to understand the background and basics of PAM, learn how to administer PAM and get reliable results, view coaching tips for supporting lower- and higher-activated patients and learn how to use the CFA tool.



## Coaching for Activation (CFA)

CFA is an online tool that helps clinical and non-clinical staff deliver tailored care plans and condition support based on a patient's activation level. It features PAM-based health goals that are broken down into actionable steps. Each step contains educational, PAM-tailored resources that can be distributed to patients.

## Dashboard

Users may click on this option to return to the Flourish Administrative Portal dashboard homepage.

**Note:** The “Extended Search” feature allows a Coach or Group Administrator to search for an individual who isn’t in their assigned groups by searching for the exact identifier value. This feature is disabled by default. Reach out to your Phreesia representative if you have questions or if your organization needs access to this feature.

## Individuals

This feature allows you to search for either an existing patient or create a new one.

If you select “Create Individual,” it will prompt you to create a uniquely assigned individual identifier (e.g., patient ID or insurance ID). The search function can be customized to a client’s preferences, but typically, users search by first and last name, individual identifier, Insignia ID or email.

## Groups

This is an organizational settings feature that includes up to two levels of hierarchy: groups and subgroups.

Client Administrators can modify and assign groups and subgroups of patient caseloads to Coaches. Group Administrators have limited access and can create Coaches only within their groups and subgroups. Coaches cannot access the Groups feature.

## Coaches

This feature routes to a screen with a search function at the top and a list of Coaches registered with the organization at the bottom. The search function lets you search for Coaches by first name, last name and/or email.

Client Administrators can edit Coach information, assign/unassign groups and subgroups to Coaches and deactivate Coach accounts. To create a new Coach, look for the “Create New” tab on the right side of the green bar.

## Administrators

This feature gives you the option to select Client Administrators or Group Administrators. Similar to the “Coaches” feature, there is a search function at the top and a list of Administrators registered with the organization at the bottom.

Client Administrators can use this feature to search for and create new Client Administrators and Group Administrators. To create a new Administrator, look for the “Create New” tab on the right side of the green bar.

