



INSIGNIA HEALTH

IPAD MANUAL

FLOURISH PATIENT ACTIVATION MEASURE APP (V2.2)

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INTRODUCTION

Insignia Health's Patient Activation Measure® (PAM®) iPad App provides clients with an easy way to administer PAM surveys beyond paper-based surveys or a fully web-based solution. By administering PAM through a portable device instead of paper, clients can avoid the administrative burden of manually transferring paper responses onto the computer.



FLOW OVERVIEW

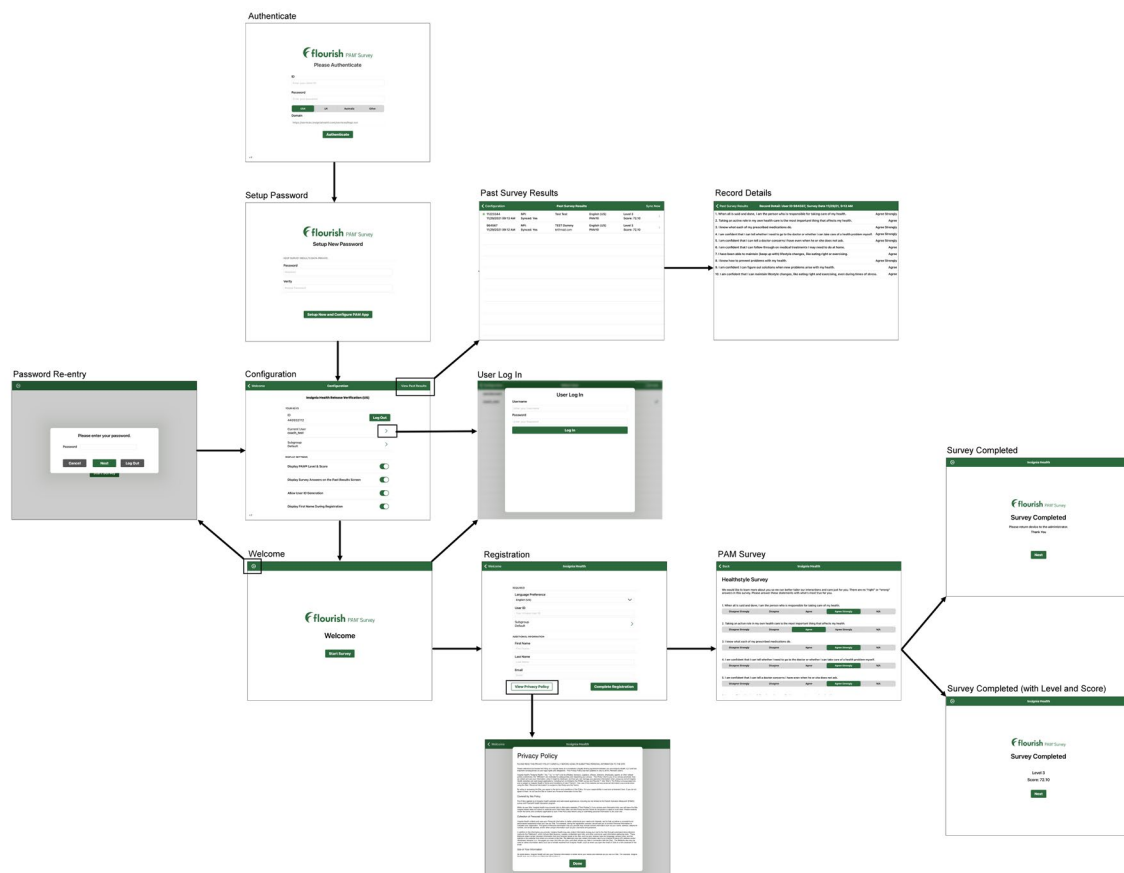


Figure 1. iPad App Screen Flow

GETTING STARTED

Figure 2. Configuration Settings

The PAM® App may be downloaded from the Apple iTunes Store. It can be found by searching for “Patient Activation Measure” or “Insignia Health” in the iTunes store when using an iPad. The app will not show up when searching the iTunes store when using an iPhone.

Once the app has been downloaded, a user must log in with the ID and Password that Insignia Health has provided. This information allows Insignia to sync data to a specific client & their group(s) in the survey system database. This is the same database that connects to the online survey system.

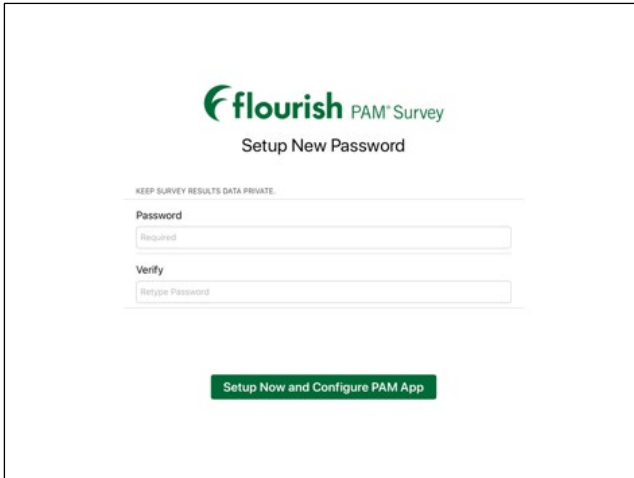
These credentials will only need to be entered once unless the user specifically logs out of the application via the application’s configuration settings.

Survey ID	Survey Name
1	PAM6
2	PAM10
3	PAM13
9	PAM6
10	PAM10
11	PAM13
1027	PAM6

Figure 3. API Settings

The initial login and password information can be found within the Flourish Administration screens. Navigate to API settings and hover your mouse over the Client Passkey masked data.

- Enter the Client External ID into the ID field on the Authentication screen of the PAM® App.
- Enter the value that pops up when you hover over the Client Passkey masked data into the Password field on the Authentication screen of the PAM® App.

WELCOME SCREEN

flourish PAM[®] Survey
Setup New Password

KEEP SURVEY RESULTS DATA PRIVATE.

Password
Required

Verify
Retype Password

Setup Now and Configure PAM App

Figure 4. Setup New Password

In accordance with HIPAA* and PHI** rules, a second 'device' password must be created for the device immediately after logging in.

The 'device' password is used to gate access to configuration settings and survey results after initial authentication into the app. You will need to enter this password to change any of the configuration settings moving forward.

INITIAL LOGGING IN TO SEE/EDIT CONFIGURATION SETTINGS

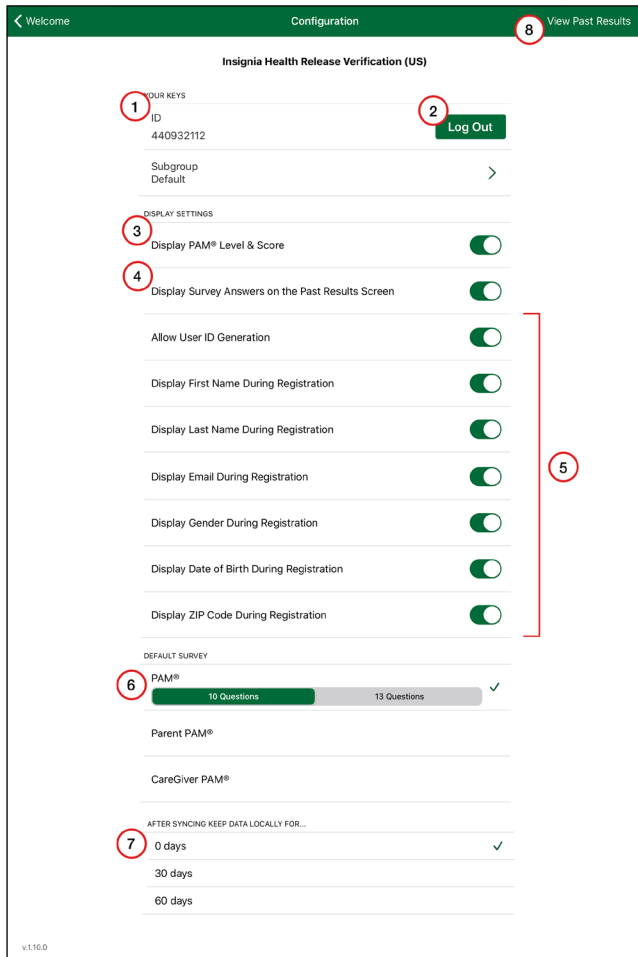


Figure 5. Configuration Settings

Upon initial login, the iPad administrator can determine what to display on the registration screens as well as set other configuration options. **ID:** Displays client ID based on the authentication credentials

1. **Log Out Button:** Logs user out of the application. In order to access the application the user must re-enter their authentication credentials and create a new password

2. **Display PAM Level & Score:** This setting determines whether or not the PAM level and score are displayed on the last page of the survey. If patients are filling out the PAM survey themselves on the iPad, this should be set to the 'off' mode.

3. **Display Survey Answers on the Past Results Screen:** This setting determines whether or not survey answers can be viewed on the "Past Results" screen that can be accessed by selecting the "View Past Results" button

4. **Miscellaneous Display Settings:** These settings determine which registration fields are displayed/collected on the registration page of the survey. Note that even if all registration fields are displayed, they are not required to be filled out

5. **Default Survey:** Select PAM survey version (10 or 13) and type (PAM, Parent, Caregiver) to be administered to patients. You will ONLY be able to select surveys for which your client has been provisioned.

6. **After Syncing Keep Data Locally For:** If the data has not synced to the server, the data will be kept on the device indefinitely. After the device has successfully synced the data, the records will be removed from the device after the time period selected.

7. **View Past Results Button:** View all past survey results and survey responses (if you have enabled this setting)

Configuration settings can also be accessed via the 'gear' icon found in the upper left-hand corner of the app.

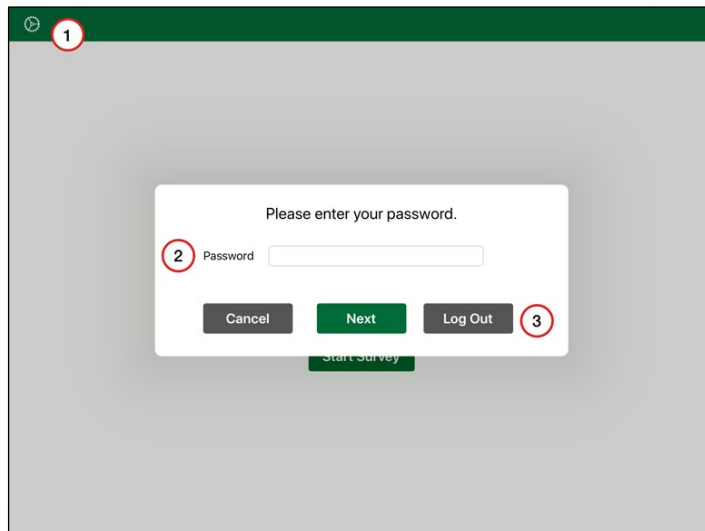


Figure 6. Password Protection

1. **Configuration Settings:** A user must enter their 'device' password before seeing the configuration settings page
2. **Password:** This is the device-specific passcode that was set up during device configuration
3. **Log Out Button:** Logs user out of the application. In order to access the application the user must re-enter their authentication credentials and create a new password. This button should be selected if the client has forgotten the device-specific password

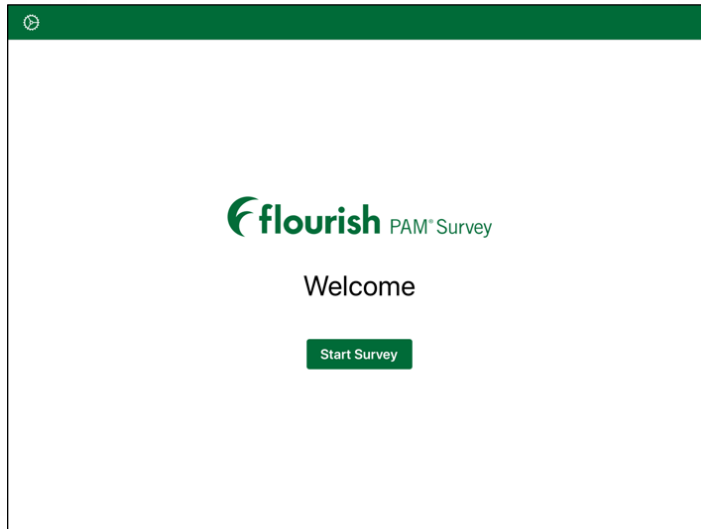
START SURVEY

Figure 7. Welcome Screen

On the “Welcome” screen, the user may either start a survey which directs the user to the registration page or they may click the ‘gear’ in the upper left corner to change configuration settings. If the user clicks on the ‘gear’ icon and wants to change the configuration settings, they must re-enter their password before the configuration settings can be altered.

USER LOGIN

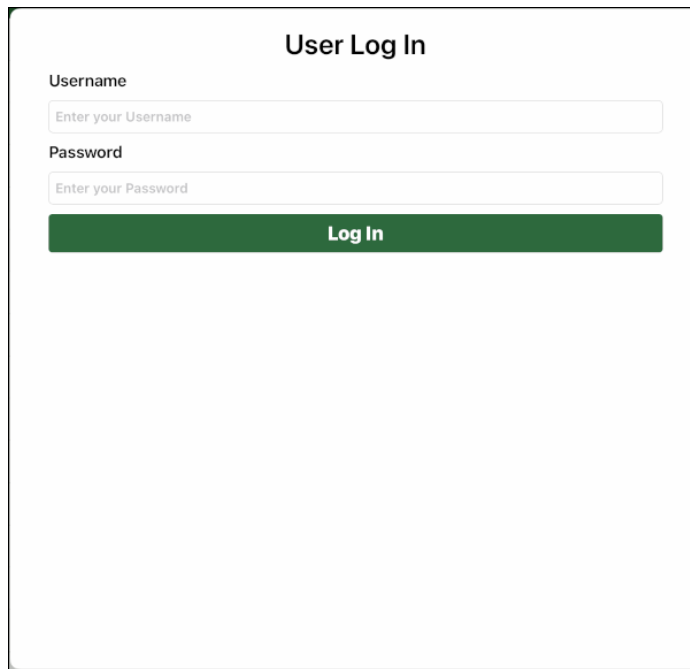
A screenshot of a 'User Log In' form. The form is titled 'User Log In' in bold. It contains two input fields: 'Username' with a placeholder 'Enter your Username' and 'Password' with a placeholder 'Enter your Password'. Below these fields is a green button labeled 'Log In'.

Figure 8. User Log In

If the user that will be administering the survey has not logged in yet, they will be asked to do so now. A list of active users can be found through the Configuration Settings page.

This login ensures that the surveys are submitted under the appropriate user for later analysis.

REGISTRATION

← Welcome Insignia Health

REQUIRED

1 Language Preference
English (US) ▼

2 User ID
Your Unique User ID ⓘ 3

4 Medicare Beneficiary ID (MBI)
Medicare Beneficiary ID (MBI) ⓘ

ADDITIONAL INFORMATION

5 First Name
First Name

Last Name
Last Name

Email
Email

Gender
Male Female Prefer Not to Answer

6 Date of Birth
Date of Birth ▼

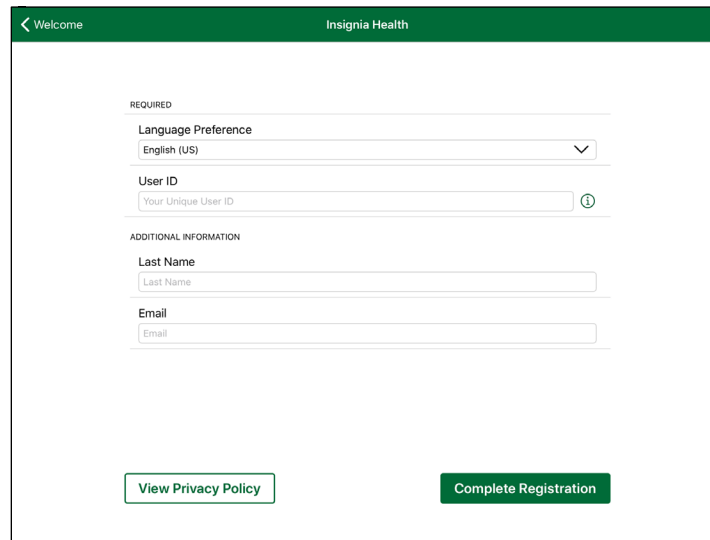
Zip Code
Zip Code

7 View Privacy Policy 8 Complete Registration

Figure 9. Registration

1. Language Preference: A user can select English, English (UK), Arabic, Czech, Danish, Dutch, French, German, Greek, Hungarian, Italian, Norwegian, Polish, Romanian, Russian, Slovak, Spanish (Mexico), Spanish (Spain), Swedish or Ukrainian as their preferred language. The registration form and PAM survey are then delivered in the language that has been selected.
2. User ID: This configurable setting allows the user to automatically generate a User ID if the client issuing PAM does not provide one. This is the only required registration field.
3. User ID Information Icon: If enabled, this provides the user with a brief description of the User ID and allows the user to randomly generate a unique User ID by selecting the “Generate ID” button.
4. National Patient Identifier: This configurable setting allows the user to input the National Patient Identifier for the Individual. National Patient Identifiers included in the system are: NHS Number, Medicare Beneficiary ID (MBI), and Australian Individual Healthcare Identifier (IHI).
5. Additional Information: The registration fields that are displayed are configurable and are not required to be completed
6. Date of Birth: If Date of Birth is entered, the user must be 18+ years old.
7. View Privacy Policy Button: By selecting this button the user will be taken to the “Privacy Policy” page
8. Complete Registration Button: By selecting this button the user will complete registration

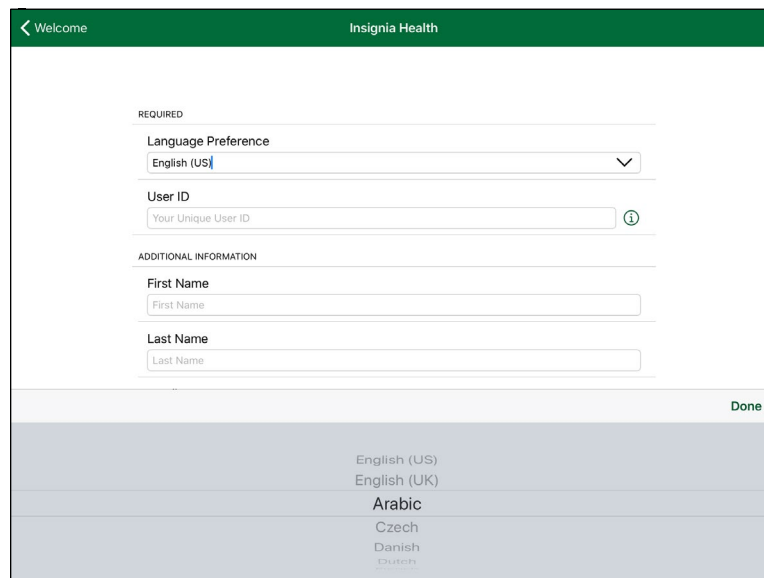
If certain registration fields are not enabled, they will not display on the registration screen.



The screenshot shows a registration screen for 'Insignia Health'. At the top, there is a green header with a back arrow and the text 'Welcome' and 'Insignia Health'. Below the header, the screen is divided into two sections: 'REQUIRED' and 'ADDITIONAL INFORMATION'. In the 'REQUIRED' section, there is a 'Language Preference' dropdown menu with 'English (US)' selected, and a 'User ID' text field with a placeholder 'Your Unique User ID' and an information icon. In the 'ADDITIONAL INFORMATION' section, there is a 'Last Name' text field with a placeholder 'Last Name' and an 'Email' text field with a placeholder 'Email'. At the bottom of the screen, there are two buttons: 'View Privacy Policy' and 'Complete Registration'.

Figure 10. Registration with Fields Hidden

In this example, Last name and Email are the only fields that have been configured to be displayed on the registration screen.



The screenshot shows a language selection screen for 'Insignia Health'. At the top, there is a green header with a back arrow and the text 'Welcome' and 'Insignia Health'. Below the header, the screen is divided into two sections: 'REQUIRED' and 'ADDITIONAL INFORMATION'. In the 'REQUIRED' section, there is a 'Language Preference' dropdown menu with 'English (US)' selected, and a 'User ID' text field with a placeholder 'Your Unique User ID' and an information icon. In the 'ADDITIONAL INFORMATION' section, there is a 'First Name' text field with a placeholder 'First Name' and a 'Last Name' text field with a placeholder 'Last Name'. At the bottom of the screen, there is a 'Done' button. Below the 'Done' button, there is a list of languages: 'English (US)', 'English (UK)', 'Arabic', 'Czech', and 'Danish'. The 'English (US)' option is highlighted.

Figure 11. Language Selection

If you wish to change Language Preference (step 1 above), select a language from the Language selector list. The selector will appear at the bottom of the screen. Once a language has been selected, the survey registration and survey page will be translated into the chosen language.

PAM SURVEY

Healthstyle Survey

We would like to learn more about you so we can better tailor our interactions and care just for you. There are no "right" or "wrong" answers in this survey. Please answer these statements with what's most true for you.

- 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** | N/A
- Taking an active role in my own health care is the most important thing that affects my health.
 Disagree Strongly | Disagree | **Agree** | Agree Strongly | N/A
- I know what each of my prescribed medications do.
 Disagree Strongly | Disagree | Agree | **Agree Strongly** | N/A
- 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** | N/A
- 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** | N/A

Figure 12. PAM Survey

The app is provisioned with PAM 10 & 13, Caregiver PAM 10 & 13 and Parent PAM 10 & 13 in English, Spanish, English (UK) and Polish. Arabic, Czech, Danish, Dutch, French, German, Greek, Hungarian, Italian, Norwegian, Romanian, Russian, Slovak, Spanish (Spain), Swedish and Ukrainian are only available as PAM 10 & PAM 13.

SURVEY COMPLETED

flourish PAM Survey

Survey Completed

Level 4
Score: 83.70

Next

Figure 33. Survey Completed Screen (with PAM Level and Score)

Once a user has completed a survey they will be provided with one of the following screens (depending on how the application has been configured):

- Patient/Consumer View:** The user will see a simple "Thank You" message and be instructed to return the iPad to the administrator
- Administrator/Coach view (Fig. 11):** The user will see the PAM level and score

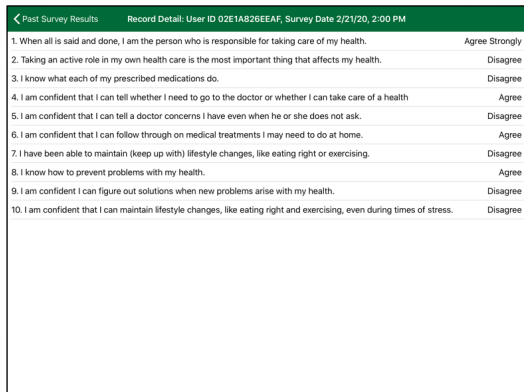
VIEWING PAM SURVEY RESULTS

< Configuration		Past Survey Results			Sync Now
● 02E1A826EEAF 02/21/2020 02:00 PM	Jane Doe	English (US)	Level 1	Sync'd: >	
	testing@email.com	PAM10	Score: 42.90	Yes	
6A017ECB21C6 02/21/2020 01:55 PM	Joe Smith	English (US)	Level 4	Sync'd: >	
	joe@email.com	PAM10	Score: 83.70	Yes	

Figure 44. PAM Results

1. "Sync Now" syncs data to the Insignia Health database if the device is connected to Wi-Fi. If the device is not on Wi-Fi the records are stored locally until they are sync'd.
2. "Yes" indicates that the record has been sync'd to admin.
3. "No" indicates that the record has not yet been sync'd to the admin site.
4. Green dot indicates the last survey taken on the device
5. Data will remain on device for time period selected on previous screen (0, 30, 60 days)
6. The '>' next to each record opens a screen that displays all PAM answer data for the Individual. Note that if the "Display survey answers on the past results screen" is toggled off, you will not be able to see the '>' and open each record

INDIVIDUAL PAM SURVEY RESPONSES



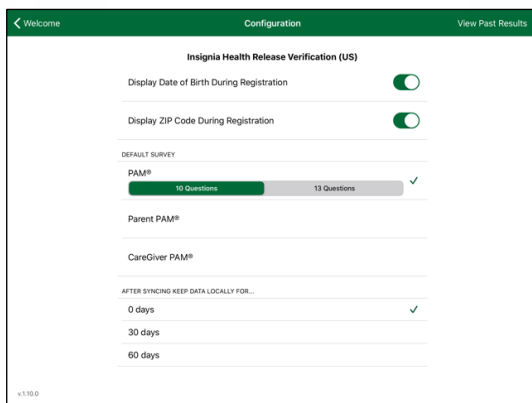
Past Survey Results	
Record Detail: User ID 02E1A826EEAF, Survey Date 2/21/20, 2:00 PM	
1. When all is said and done, I am the person who is responsible for taking care of my health.	Agree Strongly
2. Taking an active role in my own health care is the most important thing that affects my health.	Disagree
3. I know what each of my prescribed medications do.	Disagree
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	Agree
5. I am confident that I can tell a doctor concerns I have even when he or she does not ask.	Disagree
6. I am confident that I can follow through on medical treatments I may need to do at home.	Agree
7. I have been able to maintain (keep up with) lifestyle changes, like eating right or exercising.	Disagree
8. I know how to prevent problems with my health.	Agree
9. I am confident I can figure out solutions when new problems arise with my health.	Disagree
10. I am confident that I can maintain lifestyle changes, like eating right and exercising, even during times of stress.	Disagree

Figure 55. PAM Survey Responses

1. Clicking on the arrow next to each record (previous screen) takes the user to Individual Survey Results

2. Data will remain on device for time period selected on previous screen (0, 30, 60 days)

If you do not want to store this data on the device, set your device storage to '0' days.



Welcome Configuration View Past Results

Insignia Health Release Verification (US)

Display Date of Birth During Registration ☒

Display ZIP Code During Registration ☒

DEFAULT SURVEY

PAM® ☒ 10 Questions 13 Questions ✓

Parent PAM® ☐

CareGiver PAM® ☐

AFTER SYNCING KEEP DATA LOCALLY FOR...

0 days ☒

30 days ☐

60 days ☐

v1.10.0

Figure 16. Local Device Storage Setting

If you do not want to store this data on the device, set your device storage to '0' days.

ACCESSIBILITY

The app is compatible with iOS Accessibility tools such as VoiceOver and Zoom. A full list of VoiceOver gestures can be found at <https://support.apple.com/guide/iphone/learn-voiceover-gestures-iph3e2e2281/ios>. To view all accessibility tools you can visit <https://support.apple.com/accessibility/iphone-ipad>.