FLOURISH SURVEY SITE: QUICK START GUIDE

UAT TESTING ENIVRONMENT

Use the below link to access the Flourish test (UAT) site. Use this site and the following credentials to practice setting up users (patients).

UNTIL end of day March 2, 2014

https://adminuat.insigniahealth.com/Account/logon

username: USCCoach

password: Password1

Starting March 3, 2014

**IMPORTANT - UAT will be deactivated on March 3rd. On March 3rd and beyond, you will use the LIVE production site. See registration details below. (https://admin.insigniahealth.com)

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 you.
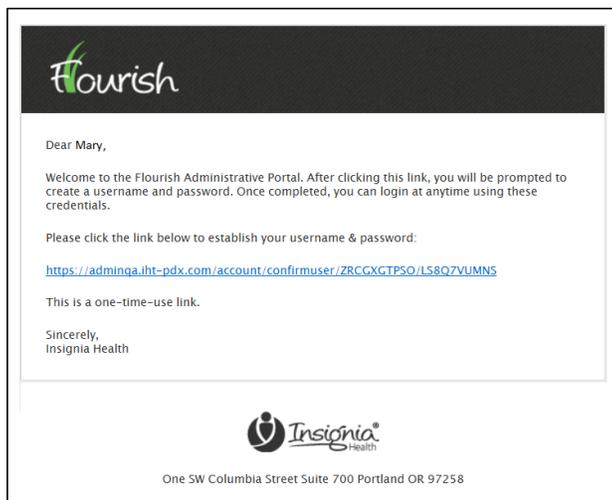
Welcome Email

- Click the link in welcome email.
- Choose a username and password.
- Make note of your credentials for all future logins.

Registration Form

When entering 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. Please, keep it for your future reference.
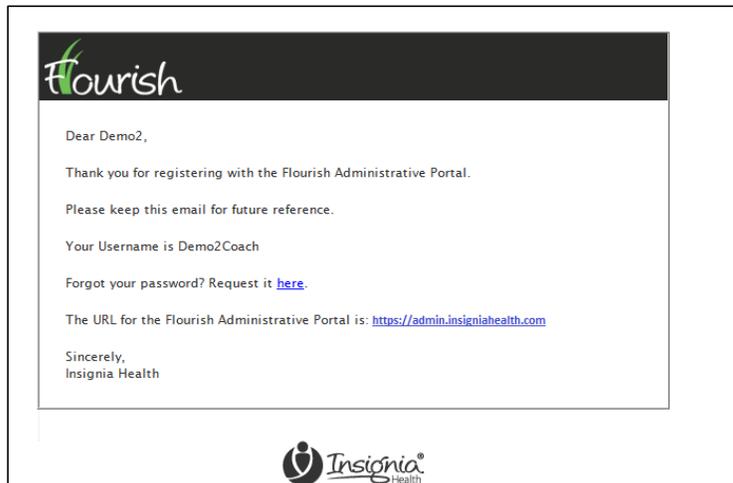
Confirmation Email

ACCESSING THE SYSTEM

Navigate to www.admin.insigniahealth.com. Please, bookmark this site in your browser for future reference.

CREATE USER

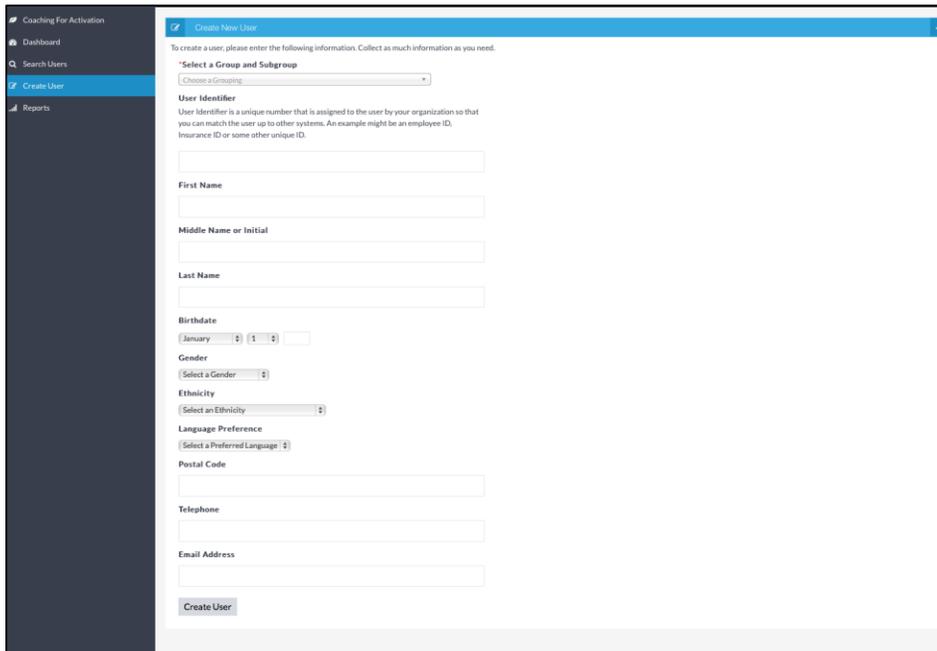Flourish Admin tool refers your patients or members as "Users".

Coaches will be able to create new users by simply clicking on the "Create User" menu item on the left side navigation bar. The "Create User" function is also available on the Dashboard as well as on the Search Users page on right side of the title bar for the list of users.

User Dashboard

COMPLETE USER FORM

1. Select the Group and Subgroup
2. Enter ID Number
3. Click "Create User"

After completing the form, you will be presented with the User's Profile page.

Users you create will automatically be assigned to you as a coach and show on your Dashboard. You can un-assign and assign users to yourself.
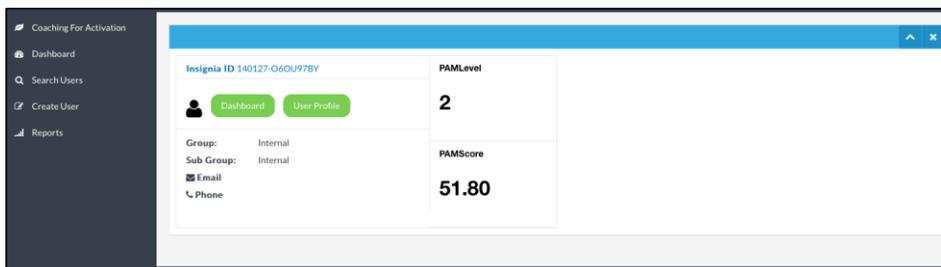
INPUT A PAM SURVEY FROM PROFILE PAGE

1. Select "Take a New Survey" on the User Profile Page
2. Select either "By Phone" or "By Paper"
3. Input the survey Completion Date
4. Select the appropriate Survey type (Caregiver10 or PAM6)
5. Click "Take Survey Now"
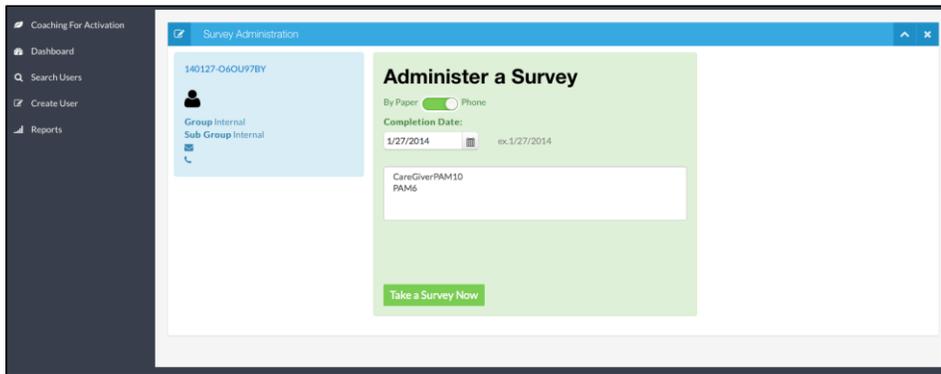
6. Enter Survey responses
7. A user's PAM score and PAM level will be generated after responses have been submitted

SEARCH FOR A USER

To look up a user previously entered to the system Coaches will have several tools:

- View the list of most recently created Users on your Dashboard
- Quick search box on the Dashboard that searches entered value in all user profile fields

Most recently created Users

- The most recent Users that were created in the system will be displayed on your Dashboard
- You can change the order of the list by clicking on any column

Quick search box

Quick search box on your Dashboard allows you to search by any set of alpha-numeric characters to look across all of your consumers' records.
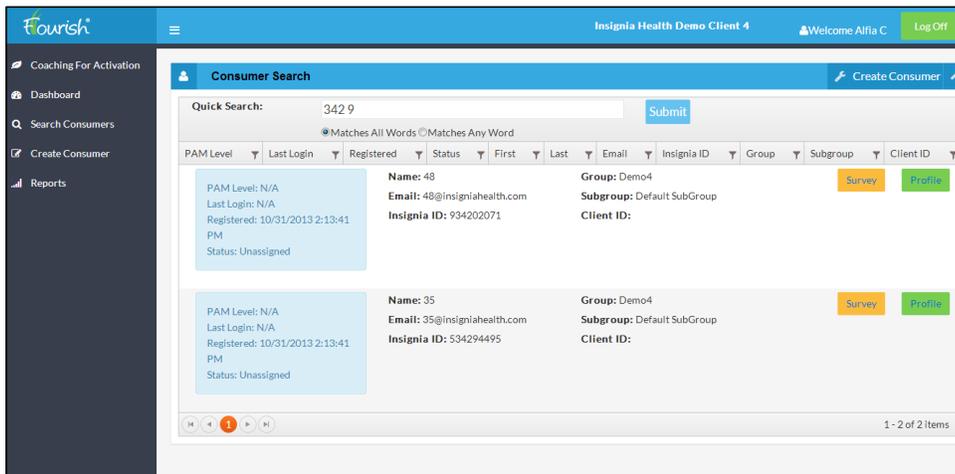
👤 Search All Users	⌃
Quick Search: [ ] Submit ⦿ Matches All Words ○ Matches Any Word	
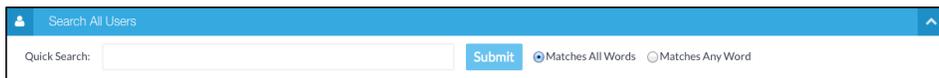
Quick Search options

SEARCH RESULTS

Your search result will be shown in a grid with detailed user information. You can access a users profile from your search results page.

You can filter your results by any column, by clicking on the filter icon next to the appropriate column.

User Search Result