

## FLOURISH SURVEY SITE: QUICK START GUIDE

### UAT TESTING ENVIRONMENT

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

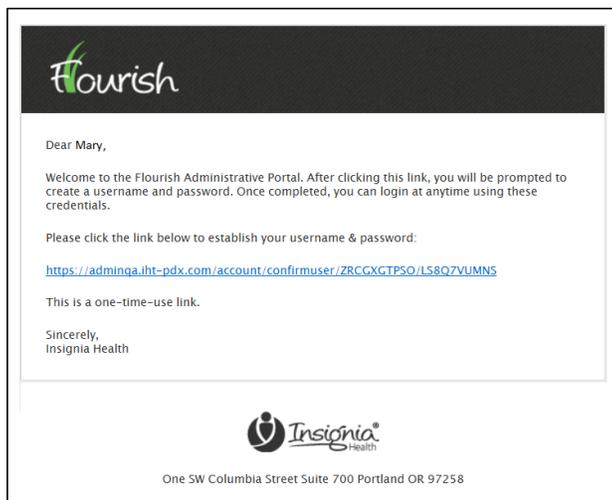
password: Password1

**Starting March 3 2014**

**\*\*IMPORTANT** - UAT will be deactivated on March 3<sup>rd</sup>. On March 3<sup>rd</sup> 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.

The screenshot shows a registration form titled "Account Confirmation" on a dark blue background. The form is white and contains the following fields and instructions:

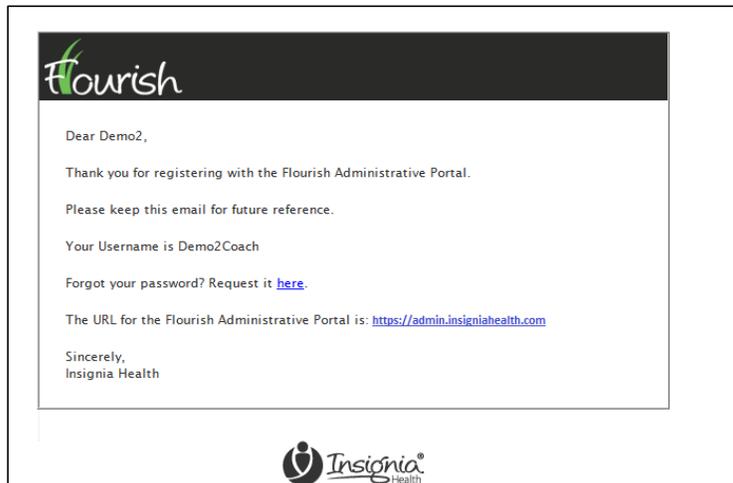
- Account Confirmation** (Section Header)
- Use the form below to choose your new username and password.
- Username**: A text input field with a person icon and the placeholder text "Username".
- Password**: A text input field with a lock icon and the placeholder text "Password".
- Confirm password**: A text input field with a lock icon and the placeholder text "Confirm Password".
- Complete Registration**: A blue button at the bottom of the form.

**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](https://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".

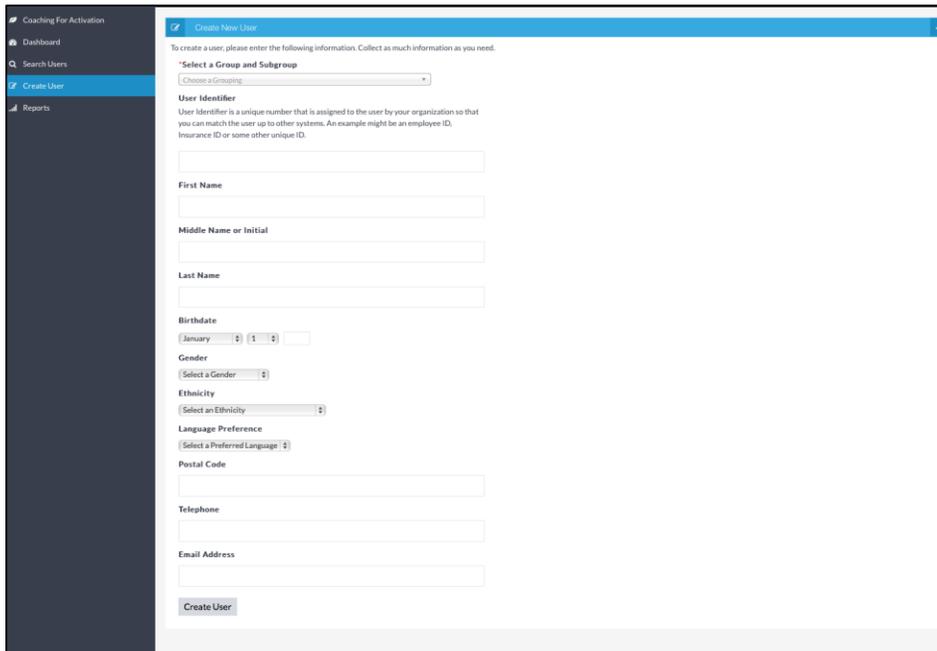
Coaches will be able to create new users by simply clicking on the "Create User" menu item on the left side navigation bar. The "Create User" function is also available on the Dashboard as well as on the Search Users page on right side of the title bar for the list of users.

The screenshot shows the 'User Dashboard' interface. On the left, a navigation menu includes 'Coaching For Activation', 'Dashboard', 'Search Users', 'Create User', and 'Reports'. The 'Create User' item is highlighted with a red arrow. The main dashboard area features several summary cards: 'Weekly enrollment' (3), 'Weekly Login' (0), 'Total Users' (5), 'Surveys Taken' (3), and 'Surveys Pending' (1). Below these is a search bar for 'Search All Users' with a 'Quick Search' field and a 'Submit' button. The 'Users Assigned to Me' section contains a table with columns: Registered, Last Login, User ID, First, Last, Last PAM, PAM Level, PAM Score, # of PAMs, Coach Status, and Action. The table currently shows 'No items to display'. A 'Create User' button is located in the top right corner of this section, also indicated by a red arrow. The footer includes 'Privacy Policy', 'Terms and Conditions', and '2014 © INSIGNIA HEALTH. ALL RIGHTS RESERVED.' along with the Insignia Health logo.

User Dashboard

## COMPLETE USER FORM

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



The screenshot shows a web application interface for creating a new user. On the left is a dark sidebar with navigation links: Coaching For Activation, Dashboard, Search Users, Create User (highlighted), and Reports. The main content area is titled 'Create New User' and contains the following fields and instructions:

- To create a user, please enter the following information. Collect as much information as you need.**
- Select a Group and Subgroup:** A dropdown menu with 'Choose a Grouping' selected.
- User Identifier:** A text input field. Below it, a note states: 'User Identifier is a unique number that is assigned to the user by your organization so that you can match the user up to other systems. An example might be an employee ID, Insurance ID or some other unique ID.'
- First Name:** A text input field.
- Middle Name or Initial:** A text input field.
- Last Name:** A text input field.
- Birthdate:** A date picker with 'January' selected for the month and '1' for the day.
- Gender:** A dropdown menu with 'Select a Gender' selected.
- Ethnicity:** A dropdown menu with 'Select an Ethnicity' selected.
- Language Preference:** A dropdown menu with 'Select a Preferred Language' selected.
- Postal Code:** A text input field.
- Telephone:** A text input field.
- Email Address:** A text input field.
- Create User:** A button at the bottom of the form.

Create New User Form

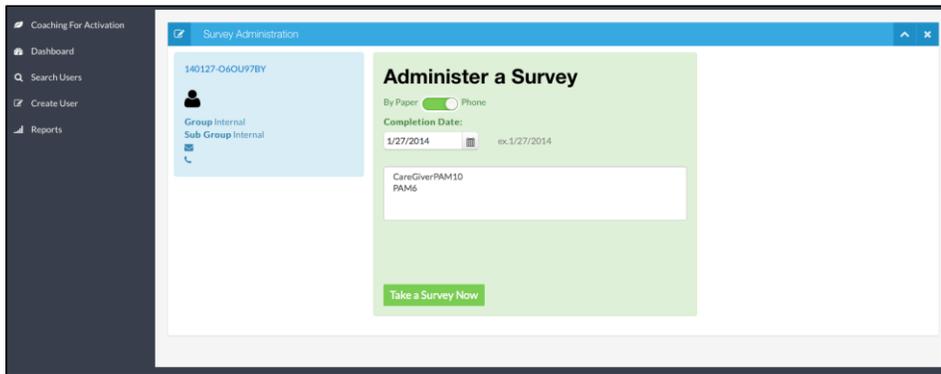
After completing the form, you will be presented with the User's Profile page.

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.

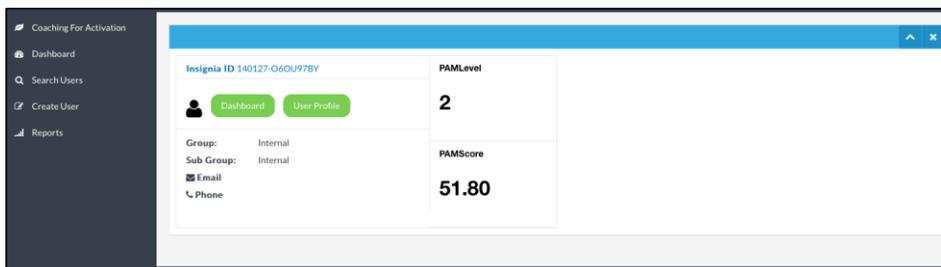
## INPUT A PAM SURVEY FROM PROFILE PAGE

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"

Commented [TB1]: I think the title of "Scenario #2" makes this clear already



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:

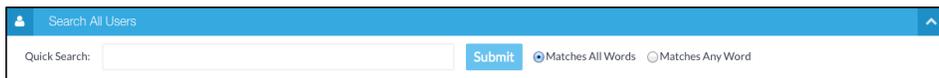
- View the list of most recently created Users on your Dashboard
- Quick search box on the Dashboard that searches entered value in all user profile fields

### 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.

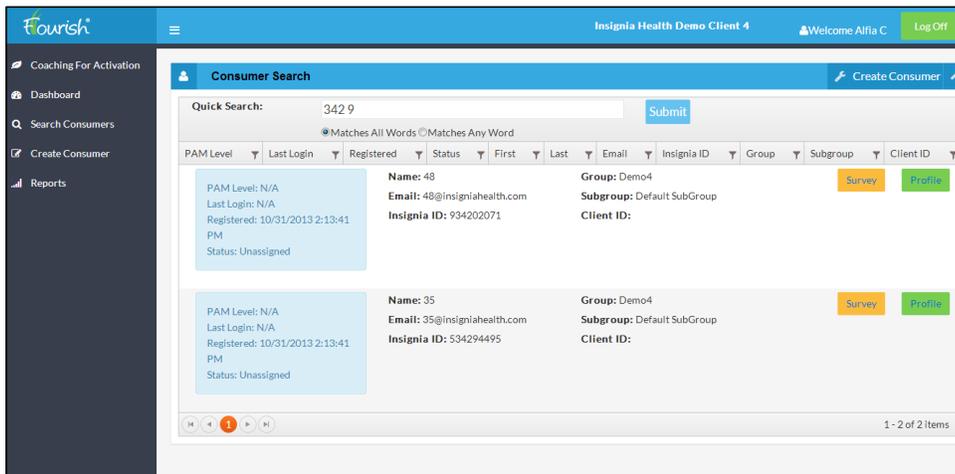


### Quick Search options

## 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.



PAM Level	Last Login	Registered	Status	First	Last	Email	Insignia ID	Group	Subgroup	Client ID
PAM Level: N/A Last Login: N/A Registered: 10/31/2013 2:13:41 PM Status: Unassigned										

### User Search Result