

## Help Guide

1. [Sign In](#)
  - a. [Systems Log in](#)
  - b. [User Access Control](#)
2. [Managing Participants](#)
  - a. [Add New Participant](#)
  - b. [Details Section](#)
  - c. [Care Management Section](#)
  - d. [Filtering](#)
  - e. [Participant Report](#)
  - f. [Manually Added Vitals](#)
3. [Create Question](#)
  - a. [Library vs. Question Series](#)
  - b. [Adding Categories](#)
  - c. [Creating Questions](#)
  - d. [Add a Parent Question to a Category](#)
  - e. [Create a Multiple-Choice Response Type](#)
  - f. [Follow-up Questions](#)
  - g. [Editing Existing Questions](#)
4. [Alerts](#)
  - a. [Setting and Editing Alerts](#)
  - b. [Global vs. Participant level Alerts](#)
  - c. [Dynamic Question & Custom Fields](#)
5. [Manage Question](#)
  - a. [Series Creation](#)
  - b. [Setting and Editing Alerts](#)
  - c. [All Question Series – Editing Series](#)
6. [Manage Groups](#)
  - a. [Reporting](#)
  - b. [Creating Groups](#)
  - c. [To Delete a Group Name](#)
  - d. [Assigning Groups](#)

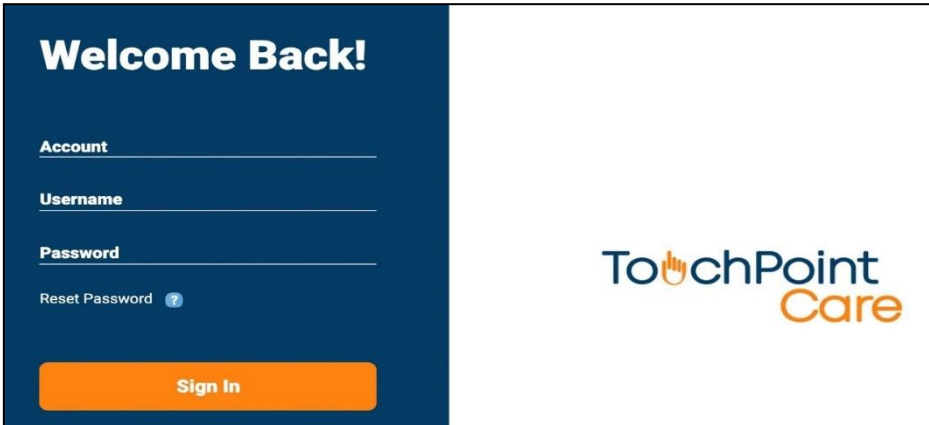
- e. [To Delete a Participant from the Group](#)
    - f. [Assigning Groups from a Participant data file](#)
  - 7. [Manage TouchPoints – Create TouchPoints](#)
    - a. [Create TouchPoint](#)
    - b. [Task](#)
    - c. [Creating the Contact Schedule](#)
    - d. [Call Agent Greeting](#)
    - e. [Comments](#)
  - 8. [Manage TouchPoints – Review TouchPoints](#)
    - a. [Filters](#)
    - b. [TouchPoint Values](#)
  - 9. [Manage Company](#)
    - a. [Details Section](#)
    - b. [Logo Section](#)
    - c. [Custom Section](#)
    - d. [IVR \(Interactive Voice Response\) Section](#)
    - e. [Security Section](#)
    - f. [Interfaces Section](#)
    - g. [Dashboard Section](#)
    - h. [Care Mgt Section](#)
    - i. [TouchPoint Rules](#)
    - j. [Call Agent Screen](#)
  - 10. [Communication Center](#)
    - a. [Agent Screen](#)
      - i. [Outbound Agent Actions](#)
      - ii. [Question Call Results](#)
      - iii. [Recording responses](#)
      - iv. [Submit Questions](#)
      - v. [Inbound Agent Actions](#)
      - vi. [Managing IVR Calls](#)
      - vii. [Record Level Locking](#)
  - 11. [TouchPoint Care Security Overview](#)
  - 12. [Frequently Asked Questions](#)
-

## 1. System Security / Log In

### a. Systems Log in

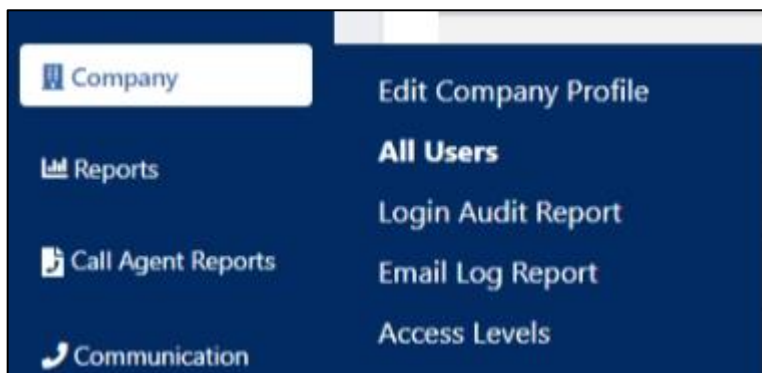
- System security is first maintained at the log-in level which requires a unique Account Name, followed by a unique Username and an associated unique Password.
- TouchPoint Care provides the unique Account Name and the initial Username and Password upon Account sign-up.
  - The Provider then establishes each unique Username and Passwords for each authorized user.
  - Upon the first log-in and use of their assigned Password, each User will be requested to enter and create (update) a new Password. For instance, Provider #1 would sign in. Provider #2 would have to sign in and will be prompted to reset the password by creating a new one.
- Follow the Steps below

#### i. Login Screen:

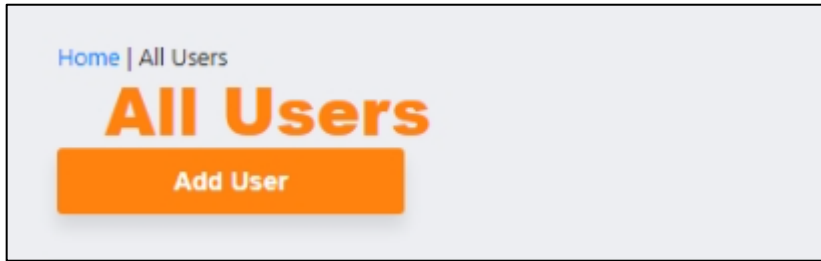


The login screen is divided into two main sections. The left section has a dark blue background and contains the text 'Welcome Back!' at the top. Below this, there are three input fields labeled 'Account', 'Username', and 'Password'. Under the 'Password' field, there is a link that says 'Reset Password' with a question mark icon. At the bottom of this section is an orange button labeled 'Sign In'. The right section has a white background and features the TouchPoint Care logo.

#### ii. On the Menu, Select Company > All Users:



iii. Click on “Add User” on the top left



iv. The New Contact screen will appear. The unique Username and associated Password need to be assigned to each New Contact.

## b. User Access Control

- Further, System Security is controlled with customization with predetermined access levels. On the New Contract Screen there is a drop-down selection box labeled “Access Level”. Other access levels can be created/ added if needed.
- Each choice has permission to access predefined areas of the system. The Security Overview table defines the access levels of each choice (listed below)

## 2. Managing Participants

### The Concept:

- The TPC System was designed to minimize data entry to the bare minimum.
- Each participant can have a unique Question Series and schedule.
- A participant can also be assigned to a Group, which can have its own unique Question Series and Schedule.

### a. Add New Participant

- On the menu, select Participants > All Participants. “Participant List” will appear.
- Click on “Add Participant”.

- The “Participant Onboarding” Screen will appear.
- Add the new participant
  - Fields with the red “(required)” must be filled in
  - “Send Alerts to” – Click on the up/down arrow to choose who the alerts should be sent to.
- After all required fields are completed, click on the “Create” Button (orange).

vi. Click “Save and Close” (blue button).

Participant Onboarding

Prev.

Step 1 of 7 - Participant Details

Next

First Name (required) :

Mary

Middle Name :

Mid Name

Last Name (required) :

Allen

Send Email Alert to (required):

Cameron Avery Hodgkinson

Primary Phone (required):

(345) 888-6321

Participant ID :

3579975

Birth Date :

09/12/1967

Gender :

Female

Save and Close

CareXM

Dashboard

TouchPoints

Participants

Groups

Question

Company

Reports

Vital Signs

Call Agent Reports

Communication Center

Home | Add/Edit Participant | Participant Information

Mary Allen

Alert ID: 720444

Details

Care Mgmt

Appointments

Login

Custom

Groups

Vitals

Files

Devices

PERS

First Name (required) :

Mary

Middle Name :

Last Name (required) :

Allen

Send Email Alerts to (required):

Cameron Avery Hodgkinson

Primary Phone (required):

(345) 888-6321

Email :

Participant ID :

3579975

Secondary ID :

Birth Date :

09/12/1967

Age: 54

Primary Diagnosis :

Risk Score :

Division :

Select...

Outreach :

Diagnoses

Primary Diagnosis :

Begin typing to select the primary diagnosis...

Contact Information

Emergency & Medical Contacts

Personal Information

Comments :

Active

UnSuspended

Activity Dates

Added/Referred : 1/28/2022

1<sup>st</sup> Activity :

Inactivated/Discharged :

Equipment Pick Up :

Hold NC Alerts Until :

MM/DD/YYYY

End Date:

MM/DD/YYYY

Last Encounter:

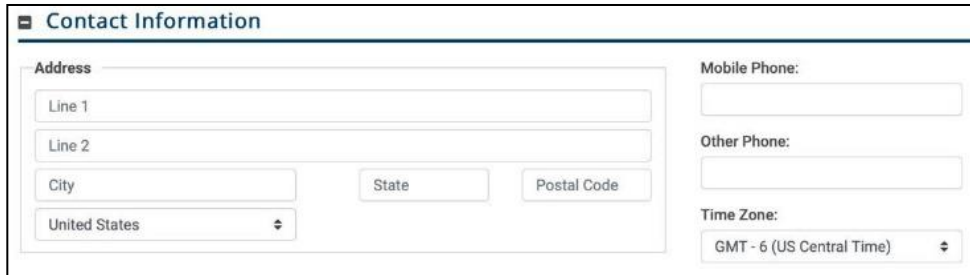
ID

MM/DD/YYYY

vii. The new participant’s name will appear. Additional information can be added as needed

## b. Details Section

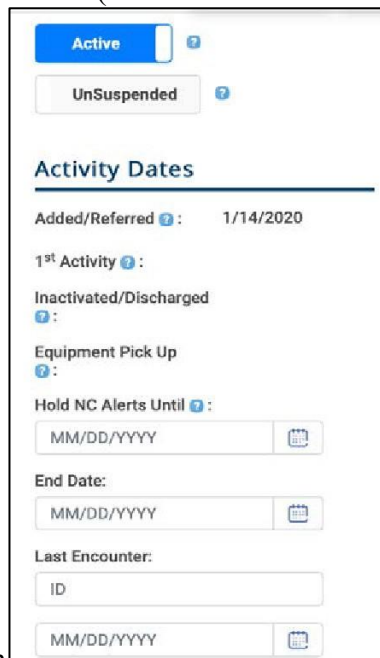
- Contact Information sub-section:
  - i. Click on the plus (+) sign next to the “Contact Information” header



The form is titled "Contact Information" and contains the following fields:

- Address:** Line 1, Line 2, City, State, Postal Code, and a dropdown for United States.
- Mobile Phone:** A text input field.
- Other Phone:** A text input field.
- Time Zone:** A dropdown menu showing GMT - 6 (US Central Time).

- ii. Complete:
  - Address
  - Phone Number(s)
  - Time Zone (Provider’s default)
    - The system will automatically adjust the Call Schedule based upon the participant’s time zone
  - Emergency & Medical Contacts
    - Click on the “(+)” to open this section
  - Personal Information
    - Click on the “(+)” to open this section
    - Complete information as needed
- iii. Right side of Details section (Click on “?” to see explanation)



This form contains the following sections and fields:

- Active/UnSuspended:** Two buttons, "Active" (highlighted in blue) and "UnSuspended", each with a question mark icon.
- Activity Dates:** A section header with a question mark icon.
- Added/Referred:** A date field showing 1/14/2020 with a question mark icon.
- 1st Activity:** A section header with a question mark icon.
- Inactivated/Discharged:** A date field with a question mark icon.
- Equipment Pick Up:** A date field with a question mark icon.
- Hold NC Alerts Until:** A date field with a question mark icon and a calendar icon.
- End Date:** A date field with a question mark icon and a calendar icon.
- Last Encounter:** A section header with a question mark icon.
- ID:** A text input field.
- MM/DD/YYYY:** A date field with a question mark icon and a calendar icon.

- iv. Click the “Save” button

### c. Care Management

- The Care Management Section is the best for charting notes with specific patient information
  - You can find it under the “Communication Center” tab on the menu from the left
    - Care Plan Sub Section
    - Medication Sub Section
    - TouchPoint Sub Section
    - Assign to Group(s) Sub section
    - Care Management Activity Sub Section
    - Appointments Section
    - Login Section
    - Custom Section
    - Groups Section
    - Files Section
    - Devices Section
    - PERS Section

### d. Filtering

- i. Go back to the menu and select “Participants” > “All Participants” to get to the Participant List
  - ii. Press the “Filter” button (orange) to sort and only display those within your filter criteria.
  - iii. When text is entered into the “Participant Name” or “Provider” field, and you click “Filter”, only those participants that match the text will be returned.
- Active vs. Inactive (Active/Suspended)
    - All participants are active when created.
    - When “Inactive”, all scheduled calls for that participant are suspended.
    - A provider can make a participant “inactive” by clicking on their name and selecting the Active box to remove the check mark.
    - “Uncooperative” and “Bad Data” automatically inactivates a participant. (See Manage Call Center > Call Results section for more details)
  - Alert ID
    - When a participant response triggers an alert, the system automatically generates an email to an address defined by the provider.
    - To comply with HIPAA guidelines, the email does not contain the participant's name.
    - Email notifies the provider that a participant with an Alert ID # of \_\_\_\_ has triggered an alert. (See Alert section for more details).
    - To identify a participant by Alert #, type the Alert # in the “Alert ID” field and click on “Filter”. The system will display that specific person.

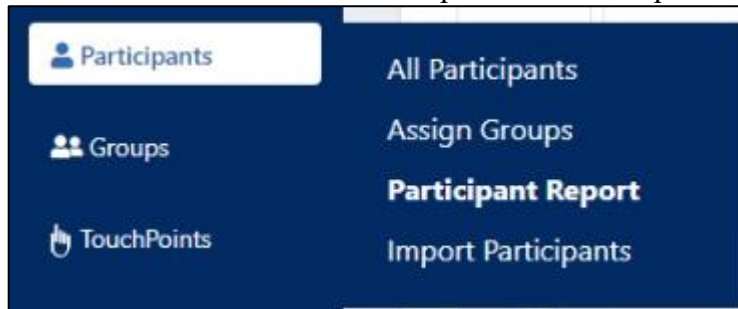


- **Provider Unique ID**
  - In addition to the system generated Alert ID, you can also enter a unique ID for each patient.
  - The Unique ID can be any combination of numbers and letters.
  - The provider's Unique ID, if any, will be displayed on all email alerts.
  - List of participants can be sorted and filtered by the "Provider Unique ID"
- **Editing Participant Data**
  - To edit data, click on the participant's name and then add, change, or delete information
  - Click "Update" to ensure change is saved.
- **Comments Field**
  - The "Add Participant" screen has a comments field in which you can enter any information relative to that participant.
  - The information is displayed on every question that is asked of that participant.
    - An example of a "Comment" that might be helpful to the Call Agent would be, "Ted is hard of hearing, please speak loudly".
- **Internet access for participants**
  - The TouchPoint Care system was designed to enable a participant to answer a question series on the internet without any inbound or outbound phone call.
  - If a provider chooses to interact with a participant via the internet, the provider must share login information with the participant.
  - The system automatically assigns each new participant an internet login ID and password.
  - The ID is the participant's phone number, and the password is the participant's last name.
  - The first time a participant logs into the system, they are prompted to create a new password.
  - Once logged in, the participant will see a menu on the left side of their screen allowing them to answer the question series, view or print out their schedule, and view reports of responses they have made.
- **Answering Questions**
  - When a participant chooses "Answer My Questions", they will see a schedule of available question sessions.
  - They can modify the filter options, and when ready, they can again select "Answer My Questions" and the first question will appear.
  - The participant will answer each question and then select either the "next" button to proceed to the next question or "back" to return to the previous question.
  - When all questions are completed, the participant will see a summary of all responses and will have the option of reviewing and editing any of these response, and when finished, will click on the "Submit Questions and return to Schedule" button.
  - Security is set so that a participant can only answer questions specifically targeted for them, as well as only see their own data via the report options.
- **Adding Participants from a data file**
  - TouchPoint Care has developed an interface to electronically load Participant

- data into the system from an XML file created by our customers and “pushed” to the touchpointcare.net application via Secure FTP.
  - TouchPoint Care will poll the SFTP server periodically and when an XML file is detected, it is processed.
  - The Participant Interface has the ability to add Participants to a group.
  - The Interface also allows you to Inactivate and Activate participants are required.
- Editing Participant Data
  - To edit data, click on the participant’s name and then add, change, or delete information

## e. Participant Report

- i. Go back to the menu and select “Participants” > “Participant Report”



 A screenshot of the 'Participant Report' search form. The form has a title 'Participant Report' in orange. Below the title, there are several search fields arranged in a grid:
 

- Provider: A dropdown menu with 'TPC- some testing' selected.
- Date Added Between: A date range selector.
- And: A dropdown menu.
- First Name: A text input field.
- Address: A text input field.
- Case Manager: A dropdown menu.
- Physician Appointment: A text input field.
- Last Name: A text input field.
- City: A text input field.
- Physician: A dropdown menu.
- Zip: A text input field.
- Phone: A text input field.
- State: A dropdown menu.
- Active: A dropdown menu with 'Active' selected.
- Suspended: A dropdown menu with 'All' selected.

 At the bottom center of the form is an orange button labeled 'View Report'.

- Each of the fields on this screen are “Searchable”.
- The report will display any participants that match all the criteria entered in any of the fields.
- Fill in the fields to search and click on the “View Report” button.

## f. Manually Added Vitals

- i. Click on the “Participants” tab, then select desired participant.
- ii. After selecting the participant, click on the “Vitals” tab.

Home | Add/Edit Participant | Participant Information

## Bruce Wayne

[Details](#)
[Care Mgmt](#)
[Appointments](#)
[Login](#)
[Custom](#)
[Groups](#)
[Vitals](#)
[Files](#)
[Devices](#)
[PERS](#)

- iii. You’ll be taken to a page with the patients past vitals. In the top right, click on “New Vital Reading”

00:08:08
[History](#)
[Onboard...](#)

Default Type: CCM

[Save & Assign](#)
[Save](#)

New Vital Reading

Vital Type	Reading
bp	120/80

- iv. Then, select “Vial Type”, and enter in a date for the reading.

New Vital Reading

Vital Type:  

Select

Select  
A1C  
Blood Glucose  
Blood Glucose Qualifier  
Blood Pressure  
Heart Rate

[Add Vital Reading](#)

[Close](#)

- v. When finished entering vitals, hit “Close”.
- vi. You can enter another vital reading by clicking on “Add Vital Reading”.
- vii. Once done entering all vitals necessary, make sure to click the “Save” button.

00:08:08
[History](#)
[Onboard...](#)

Default Type: CCM

[Save & Assign](#)
[Save](#)

New Vital Reading

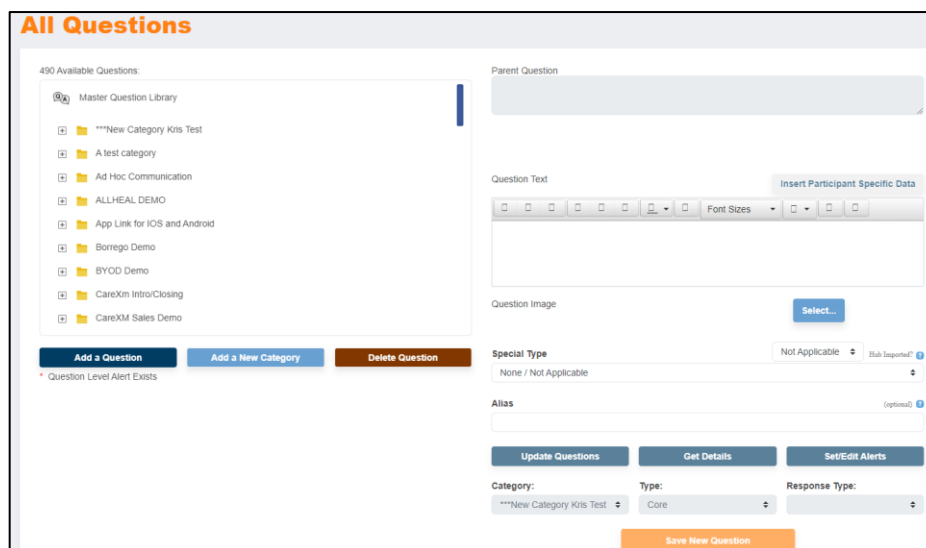
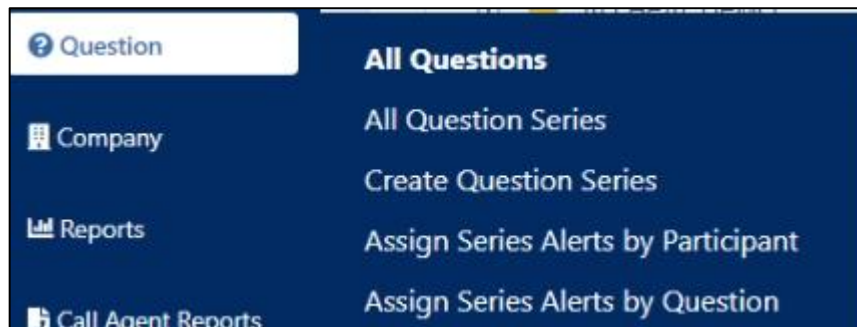
### 3. Create Question

The Concept:

- The TPC system provides a library of questions organized into a variety of categories.

To Create a Question:

- Go to the Questions Tab
- Select All Questions
- From the All Questions menu, you can add, change, and delete Categories and questions.
- The + sign next to a Category or questions indicates that there are questions or follow-up questions associated with it.



There are a few things you must know and understand when creating a Question and Series.

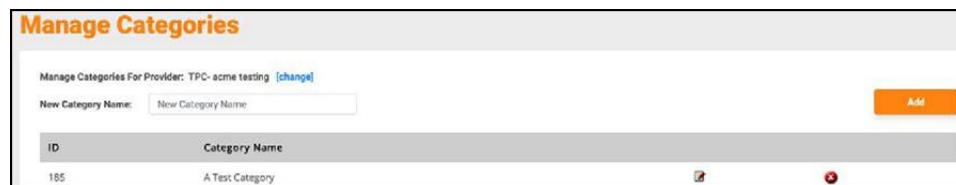
#### a. Library vs. Question Series

- The library is an inventory of available questions. A Question Series is a group of questions selected from this inventory. (Question Series are discussed in the next section.)

- Categories are displayed in alphabetical order.
- The Parent Questions in a Category are also displayed in alphabetical order.

## b. Adding Categories

- To add a Category name, just click on Add a New Category, type the desired Category name in the New Category Name; dialog box and click the Add button.

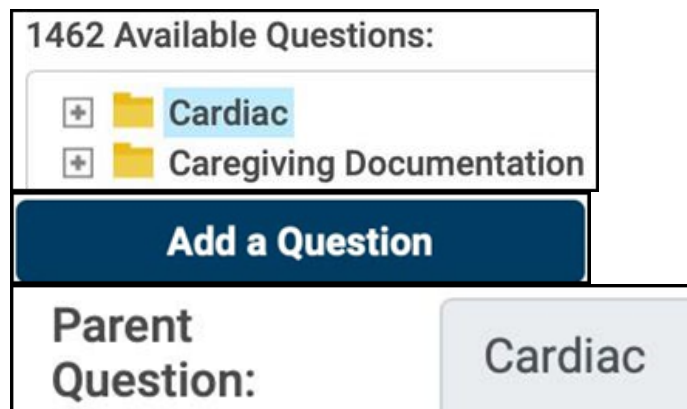


## c. Creating Questions

- New questions can be added to a Category. These are called Parent Questions.
- Questions can also be added to a Parent Question, and these are called Follow up Questions.

## d. Add a Parent Question to a Category

- Click on the Category under “Available Questions.” and then click on “Add a Question.” The category will appear in the “Parent Question” area.



- Type in or copy & paste the question in the “Question Text.” area.

Question Text: Insert Participant Specific Data

**B** *I* U **A** Font Sizes

Type or copy & paste question here.

- iii. Select the Response Type from the drop-down menu by using the (up & down arrows)

**Response Type:**

- 10 Points
- Multiple Choice (Multi-Select)
- Multiple Choice (Single Select)
- Numeric
- Statement
- Text
- Time
- Yes/No

### Response Types:

- 10 Points – on a scale of 1 to 10.
- Multiple Choice (Multi-Select) – allows you to create and order the responses. More than one choice can be selected.
- Multiple Choice (Single-Select) – allows you to create and order the responses. Only one choice can be selected.
- Numeric – allows a number to be entered.
- Statement – creates a statement instead of a question, no response is required from the participant. Used for educational purposes, training, and encouragement.
- Text – allows 1000 characters of free form text.
- Time – creates a drop-down list to select a time from.
- Yes/No - creates a question that will require a yes or no answer.

- iv. Click on “Save New Question” (Orange button)

### e. Create a Multiple-Choice Response Type

- i. Select Multiple Choice and click on “Save New Question”. The “Question Detail” screen will appear

Question Text: Insert Participant Specific Data

Multiple choice question

Question Image Select...

Special Type: Not Applicable Hub imported? Alias (optional)

None / Not Applicable

Update Questions Get Details Set/Edit Alerts

Category: \*Jill2 Type: Core Response Type: Multiple Choice (Multi-Select)

Save New Question

**Question Detail**

Parent Question:

Question Text: Question text here

Alias:

Category: Cardiac

Type: Core

Response Type: Multiple Choice (Multi-Select)

If Participant Answers:

Since this is a multiple choice question, please provide the possible answer choices below.

ID	Answer	Order	Survey Value**	Answer ID		
1469	first answer	0				Delete
1470	second answer	0				Delete
<span>Add</span>						

Multiple Choice Answers

- ii. Under the Answer column, type an answer and then click on Add. An ID # will be created for that answer.
- iii. Repeat step ii as many times as needed.
- iv. When done, click on “Return” to “Question List”

Return to Question List

- v. Question ID:
  - The system generates a unique number for each question added to the library, including follow-up questions.
  - When questions are added to a Series, discussed in the next section, the unique Question ID # is one of the identifiers the system uses to generate reports.

- Editing the text of an existing question does not change the ID #.

## f. Follow-up Questions

- Follow-up Questions can be added to Parent Questions with a Response type of Yes/No, Numeric, 1-10 Scale and Multiple Choice.
  - The Parent Questions are under the Categories in the Available Questions list.

### To Add a Follow-up Question to a Parent Question:

- i. Select the Parent Question to which you want to add a follow-up question.
- ii. When a follow-up question is to be added to a Parent Question with a Response Type of Yes/No, the user will be prompted to select for which response a follow up question is to be added. The system allows the user to create follow-up questions to both Yes and No responses to the same Parent Question.

### Numeric or 10-Point Scale Response Type:

When a follow-up question is to be added to a Parent Question with a response type of numeric or 10-point scale question the user is prompted with the following text:

**If the participant's answer is:**

1. Equal to or above \_\_\_\_\_ or
2. Equal to or below \_\_\_\_\_

**ask the following:**

**Note: You may enter a value in line 1 OR line 2 OR both line 1 and line 2.**

The user is able to enter any numeric value into the text boxes. In the case of 10-point scale questions, the number must be between 0 and 10.

### Multiple-Choice Response Type:

When a multiple-choice question is highlighted in the "Available Questions" tree and the "Add a New Question" button is clicked, the user is prompted with the following text:

**If the participant's answer is:**

**<list of possible multiple-choice answers goes here with checkboxes>**

**ask the following:**

The user is able to select one or many answers that would trigger the follow-up question.

3. Add the question text and select the response type for the follow-up question



## 4. Click on Save Question

A Parent Question can have unlimited follow-up questions.

The system logic for follow-up questions is as follows:

If the response to the Parent Question = “Yes” then ask this follow-up question.

If the response to the Parent Question = “No” then ask this follow-up question.

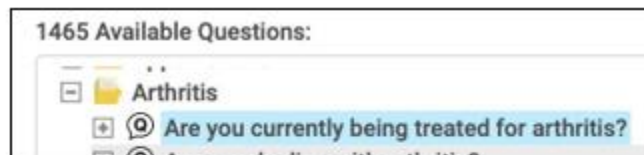
Follow-up questions can also be added to follow-up questions. To add a follow up to a follow up question use the same steps as in creating a follow-up question, above. There is no system limit to the number of levels of follow-up questions.

The system stores follow-up questions in alphabetical order or numerical order. For you to control the sequential order of more than one follow-up question to one Parent Question you will have to ensure that follow-up questions are in alphabetical order or number them in the desired order as you create them.

When follow-up questions are added to a Parent Question the system treats that Parent Question and all follow-up questions as a single entity. When a Parent Question is added to a Series, all associated follow-up questions are automatically part of that Parent Question in the Series.

## g. Editing Existing Questions

- Once a Parent Question or Follow-up Question is saved, only the text of the question can be edited.
- The Response Type cannot be changed.
  - To change the Response Type, you must either create a new question with the appropriate response type or delete and reenter the question.
  - To edit the text, click on the question, make the necessary text edits and then click on Update Questions.



**Update Questions**

## 4. Alerts

The concept:

- The TouchPoint Care system was designed to facilitate the concept of “management by exception”.
- Alerts are the mechanism you use to identify the exceptions. Exceptions, or Alerts, can be defined as those responses to a question that fall outside of a tolerance or threshold that the user establishes, e.g. CHF patient weight fluctuation is very important, so the question, “How much do you weigh today?” can have an Alert associated with a response that is above or below a specific tolerance that is set, say below 140 lbs. or above 146 lbs. Or, exceptions can be defined as one specific response among several, e.g. an Alert may be set for any response of “No” to the question, “Would you recommend our services to a friend or relative?”
- Alerts can be set and edited for Core or Follow-up questions with response types of Yes/No, Numeric, 1-10 Scale, Multiple choice and Text.
- Every time a response triggers an Alert, the system generates an e-mail to the Provider detailing the date, time, Participant Alert ID #, the question and the response that triggered the Alert.

Email example:

\*\*\*\*\*

This is an automated message for ACME from TouchPointCare.net.

The following participant has answered a question with a response that has triggered an alert:

Participant Alert ID 76  
Series Name: CHF Series Group Demo  
Date: 12/1/2006 05:08 PM

Alerts Triggered:

Question: On a scale of 1 to 10, with 10 being excellent, how are you feeling today?  
Participant Response: 3  
Alert Setting: 7 - 10

Question: Do you have any immediate health issues you need addressed that can't wait until your next visit?  
Participant Response: Yes  
Alert Setting: Yes

To retrieve details for the participant with alert ID 76:

- i. Go to <http://www.touchpointcare.net> and login.
- ii. Go to Manage Participants -> Add/Edit Participants.

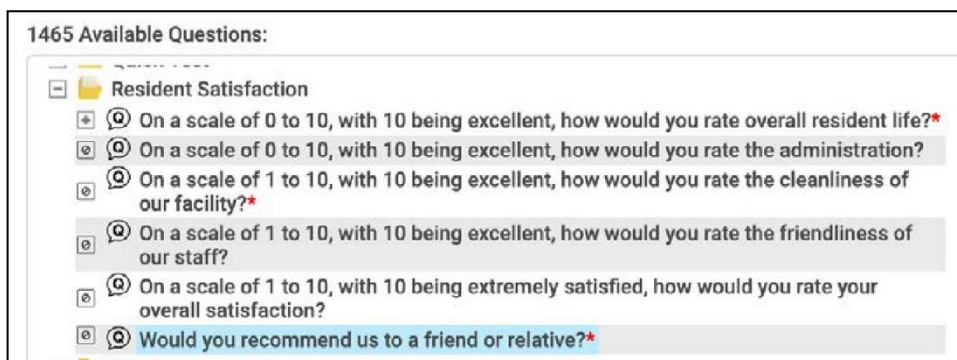
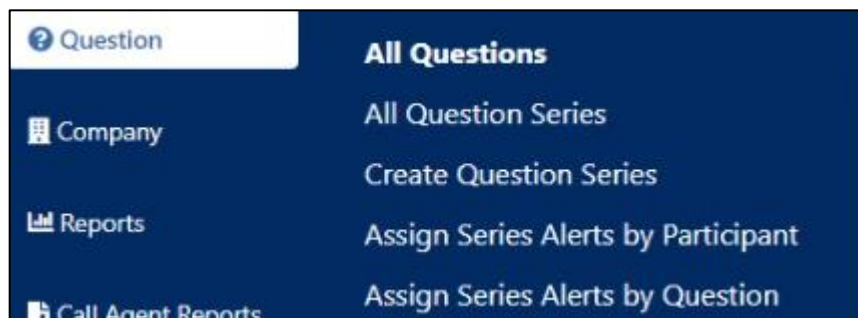
- iii. Enter the Alert ID (76) into the Alert ID textbox.
- iv. Click Filter.
- v. Click on the participant name to view the details.

\*\*\*\*\*

- Also, all responses that trigger an Alert are displayed in red in all the TouchPointCare reports.

## a. Setting and Editing Alerts

- Alerts can be set and edited on the Available Questions or on questions in a Series.
- They can be set on the Available Questions when the question is first created or any time thereafter.
- They can be set on questions in a Series when the Series is created (see next section) or any time thereafter.
- When a question is set with an Alert on the Available Questions and then is added to a Series, that question will retain the Alert values in the Series.
  - Similarly, if an Alert is set on a question in a Series, then that Alert will also be associated with that question on the Available Questions.
- To set an Alert on a question on the Available Questions:
  - i. Click on Questions > All Questions and then select a question.



- ii. Click on Set/ Edit Alerts



- iii. Then select the response that will trigger an Alert. The “An alert message will be sent after \_\_\_ triggered response(s)” field lets you set how many times a Participant can respond to a question with an “Out of threshold” response before an Alert email is sent.

### Manage Alerts/Assign to Group by Question

**Alert Information:**

Question: Would you recommend us to a friend or relative?

Alert Type: Question

Question Type: Yes/No

Set as Alert?: ☒

Use Second Group For Tablet?: ☐

**Alert/Assign to Group Settings:**

Select Answer that will trigger Alert and/or Assign to Group:

☒ Send Email Alert?

☐ Assign Participant to Group?

Group:

Second Group:

Start Time Delay (in minutes):

**Send Email Alerts to:**  
(Entering one or more e-mail addresses will override the default setting in the field "Send e-mail Alerts to:" for this question for all Participants)

An alert message will be sent after  triggered response(s).

**Alert/Assign to Group Settings:**

Select Answer that will trigger Alert and/or Assign to Group:

☒ Yes ☒ No

An alert message will be sent after  triggered response(s).

- For questions that have a Response Type of Numeric or 1-10 Scale, you will be prompted to enter a “Decrease by” value where responses below that number will trigger an Alert and an “Increase by” value where responses above that number will trigger an Alert.

**1465 Available Questions:**

☒ ☒ Here are some local walking and biking trails in you

☒ ☒ How are you feeling today on a scale of 1 to 10

## Manage Alerts/Assign to Group by Question

**Alert Information:**

Question: How are you feeling today on a scale of 1 to 10

Alert Type: Question

Question Type: 10 Point Scale

Set as Alert?: ☒

Use Second Group For Tablet?: ☐

**Alert/Assign to Group Settings:**

**Compare to Last Response**

Responses that decrease or increase by the specified amount below trigger these alerts.

	Decrease by:	Increase by:	Send Email Alert	Assign to Group
	2	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			<input checked="" type="checkbox"/>	<input type="checkbox"/>

### Send Email Alerts to:

(Entering one or more e-mail addresses will override the default setting in the field "Send e-mail Alerts to:" for this question for all Participants)

An alert message will be sent after  triggered response(s).

Create Alert and/or Assign to Group

- To Set/Edit Alerts for questions in a Series, from the main menu select Question > Assign Series Alerts by Question and then select the Series for which you want to set question Alerts. Then follow the same procedure above for setting the Alerts.

**Question**

All Questions

All Question Series

Create Question Series

Assign Series Alerts by Participant

**Assign Series Alerts by Question**


## Assign Series Alerts by Question



Select a Series : [\[Review Series\]](#)


Select...


Select a Series : Companion Care [\[Change\]](#) [\[Review Series\]](#)


Series Questions:


 **Series Questions**


  **Personal Care Visits**

☒  What is the date of service?

☒  When did your shift end?

☒  **Did your client require more care than usual?**

☒  Did client need any reminders regarding personal hygiene?

☒  **Have there been any other changes in the client's condition?**

## b. Global vs. Participant level Alerts

- When Alerts are set on questions in either the Available Questions or a Series, they are considered Global or Question level Alerts. This means that all Participants whose response exceeds the threshold for that question will trigger an Alert.
- The TouchPoint Care system also gives you the ability to set Alerts specific to a Participant. These Participant level Alerts allow you to further customize the system for your business and your Participants. Participant level Alerts act the same as Global Alerts. A question can have a Global Alert and be overridden by a Participant level Alert for maximum flexibility.
- Participant level Alerts can only be set after a TouchPoint has been created. (see Manage TouchPoints section). Participant level Alerts can be set from the main menu Question > Assign Series Alerts by Participant, where you select which Participant and which Series and then select the question on which you want to set the Alert.
- Participant level Alerts *always* override the Question or Global level Alerts.



Question



Company



Reports

All Questions

All Question Series

Create Question Series

**Assign Series Alerts by Participant**

Assign Series Alerts by Question

### Manage Alerts/Assign to Group by Question

Select a Provider: TPC- acme testing [\[Change\]](#)

Select a Participant:

Please Choose Participant...

Select a Series :

Select...



Select a Participant: Banks, Ernie [\[Change\]](#)

Select a Series : CHF - Diabetes [\[Change\]](#) [\[Review Series\]](#)

Series Questions:

☒ Series Questions
 

- ☐ Cardiac
  - ☒ On a scale of 1 to 10, with 10 being wonderful, how are you feeling today?
  - ☒ Have you experienced any swelling in your feet, ankles or abdomen?
  - ☒ Are you having any chest pain?
- ☐ Vitals-Measures
  - ☒ Have you checked your weight today?
  - ☒ Have you taken your blood glucose reading today?
  - ☒ Have you taken your Blood Pressure today?
- ☐ diabetes
  - ☒ Do you have adequate supplies to monitor your blood sugar?
  - ☒ Do you have any immediate health issues you need addressed that can't wait?

### c. Dynamic Question & Custom Fields

- “Dynamic Questions” are questions that can be worded with data specific to a Participant.
  - For example, you can create a question asking the Participant to confirm their address while specifying the Participant’s address in the question. This question could be written as “Is your home address still: 55 N. Elm St., Chicago, IL 60060?” The system will pull the Participant specific data from the Participant record and insert it into the body of the question.
- The system also allows you to create four (4) Custom Fields in the Participant record that can be used in Dynamic Questions as well.

***To learn more about Dynamic Questions and Custom Fields contact your TouchPoint Care representative.***

## 5. Manage Question

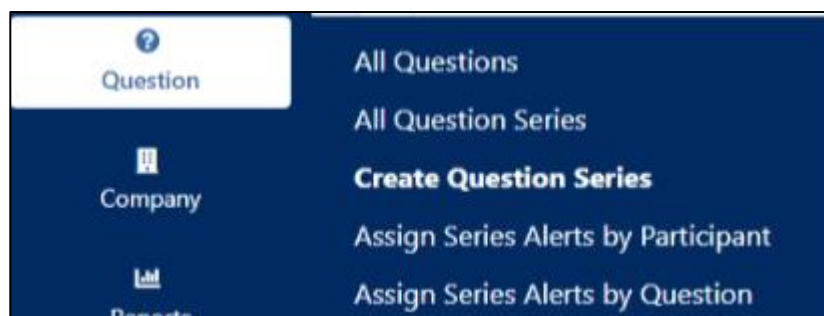
### The Concept:

- The TouchPoint Care system is designed to let a user create an unlimited number of unique Question Series to collect Participant self-reported data.
- Each Question Series is a collection of questions selected from one or more categories in the Available Questions.
- Reporting: The TouchPoint Care reporting uses the Question Series name as a major filtering and sorting criteria. Be sure to use Question Series names that are descriptive enough to facilitate your reporting needs

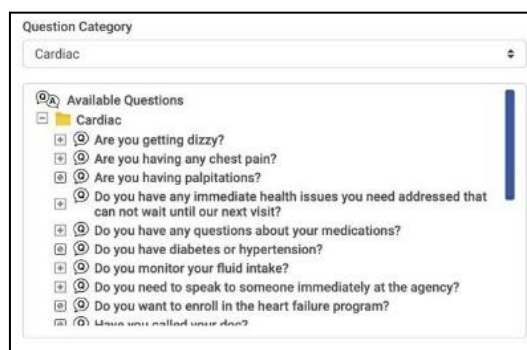
### a. Series Creation

To create a Question Series:

- From the Main Menu, select “Question” > “Create Question Series”



- Then select a Question Category which has the first question you want to add to a Series. The system will display all the questions in that Category.





- iii. Click on the first question you want to add to a new series and then click on “Add” and that question will then be added into the Question Series box.

The screenshot shows two panels. The left panel, titled 'Available Questions', contains a folder icon and the text 'Cardiac', and below it, a question icon followed by 'Are you getting dizzy?'. A blue 'Add >>' button is to the right. The right panel, titled 'Series Name', has a text input field. Below it, under 'Series Questions', is a folder icon and 'Cardiac', and below that, a question icon followed by 'Are you getting dizzy?'.

- iv. To select a question from another Category just select another Category from the drop-down menu and then click on the question and then click on Add. Repeat this process for each question in the order in which you want the Question Series.

- Advanced Settings – This is only needed for IVR Outbound Calls. This will be entered by TPC administration. The “OIVR Series ID” is used by the IVR system to know which question series to use.

- v. When you have added all the questions you want, give the series a descriptive name for reporting purposes and then click on Save Series.

The screenshot shows a text input field labeled 'Series Name' with the placeholder text 'Enter Series Name Here'. To the right of the input field is an orange button with the text 'Save Series'.

- Follow up Questions:
  - Keep in mind that if a question in the Question Category/Available Questions has follow-up questions associated with it, when you add that question to a Series, all of the follow-up questions automatically are added to the Series as well. (see Create Questions section above)

The screenshot shows a section titled 'Series Questions'. It contains a folder icon and the text 'Cardiac', and below it, a question icon followed by 'Are you getting dizzy?'. Below that is a plus icon followed by a question icon and 'How bad is it on a scale of 1-10 with 10 being the worst?'. Below that is a folder icon and the text 'Dementia', and below it, a question icon followed by 'Are you experiencing nausea?'. Below that is a plus icon followed by a question icon and 'Great!'. Below that is a plus icon followed by a question icon and 'Sorry, what seems to be the issue?'.

## b. Setting and Editing Alerts

- Upon saving a New Question Series the system automatically goes to the Assign Series Alerts by Question review screen where you can see which questions in the new Series are set with Alerts. Keep in mind that if you edit the Global Alert setting on a question that has already been used to collect responses in other Series the historic response data will only reflect the most recent Alert setting.

### Assign Series Alerts by Question

- To Manage the Alerts, complete all the fields below:

Alert Information:

Question: Did you have a fall incident in the last 24 hours?

Alert Type: Question

Question Type: Yes/No

Set as Alert?: ☐

Use Second Group For Tablet?: ☐

Alert/Assign to Group Settings:

Select Answer that will trigger Alert and/or Assign to Group: Yes

☐ Send Email Alert?

☐ Assign Participant to Group?

Group:

Second Group:

Start Time Delay (in minutes):

Send Email Alerts to:

(Entering one or more e-mail addresses will override the default setting in the field "Send e-mail Alerts to:" for this question for all Participants)

An alert message will be sent after 3 triggered response(s).

## c. All Question Series – Editing Series

- Upon saving a New Question Series, there is an All Question Series selection button that will display Question Series with several edit icons next to each question.
  - Click on "All Question Series"

- ii. Enter the Series name and click on the “Filter” button.

Home | All Question Series

## All Question Series

Active      Series Name:

Active            **Filter**

- iii. Click on the name of the series.
- iv. Edits Icon appear after each question under the “Action” column and “Edit” buttons are at the bottom of the screen.

**Enter Series Name Here. Detail**

ID	Category	Question	Alert Set	Action
1547	Cardiac	Are you getting dizzy?	No	
1548	Cardiac	How bad is it on a scale of 1-10 with 10 being the worst?	No	
3616	Cardiac	Is your doctor or nurse aware of this?	No	
3406	Dementia	Are you experiencing nausea?	No	
3407	Dementia	Great!	No	
3408	Dementia	Sorry, what seems to be the issue?	No	
3409	Dementia	How many times does this occur?	No	
3410	Dementia	WOW...that is a lot of times	No	

**Set/Edit Alerts**

[Edit Series](#)
[Deactivate Series](#)
[Add New Series](#)
[Reorder Questions](#)
[Print Series](#)

- Edit Icons - These icons let you make the following edits:

- Change the question text but not the response
- Set or edit a Global Alert
- Remove the question from the series
- Change the order of a question in a Series by selecting the up or down arrow

- Edit Buttons – The “Set/Edit Alerts” button takes you to the screen where you can set and edit the alerts.
- The Edit Series button takes you back to the Create Series screen where you can add new

questions. All new questions added will automatically be placed at the end of the series.

- To change the order of the question in the series, go to the Review Series menu and select the up or down arrow to control the order of the questions.
- The Deactivate Series button will delete a series and all the associated data.
- The Add New Series button takes you back to the Create Series screen.
- The Reorder Questions button allows you to change the order of the questions. To change the order of the question in the series, go to the Review Series menu, click on the question, and select the Move Up or Move Down button to control the order of the question.
- The Print Series allows you to print it out.

Deactivate Series

Add New Series

Reorder Questions

Print Series

## 6. Manage Groups

The Concept:

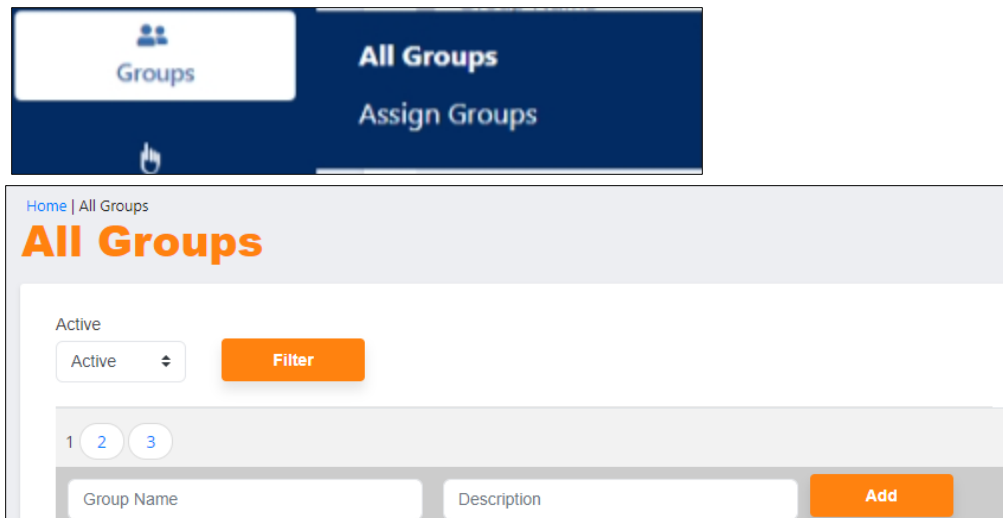
- Groups are designed to enable a Provider to create Question Series and Schedules that are common to a Group of Participants.
- Groups include one or more Participants.
- A Participant may be assigned to more than one Group.

### a. Reporting

- The TPC system was designed to provide reports based upon Groups, among other things. Since the Provider can generate reports for any Group, the naming conventions used to create Groups should be considered.

### b. Creating Groups

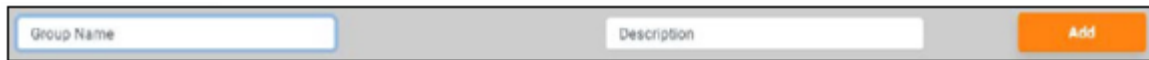
- To Create a Group:
  - Go to the Main Menu and select Groups > All Groups. The “All Groups” section will appear.



- Before adding/creating a New Group, check the list under “Group Name” to make sure it doesn’t already exist.

Group Name
***Jill Group
**CHF Coaching & Enrollment
**Heart Failure High Tech
**Heart Failure High Touch

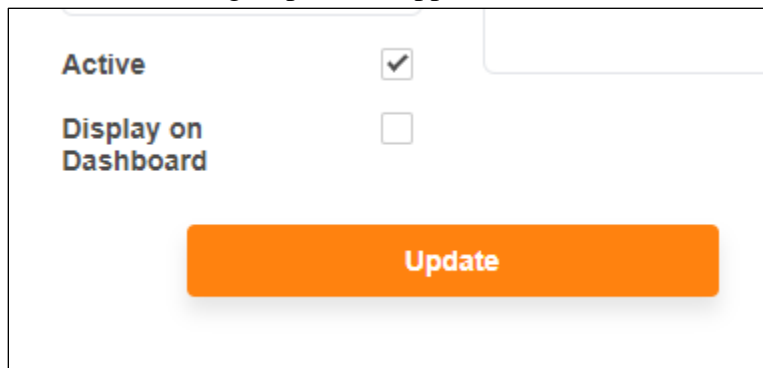
- iii. In the Group Name space, type in a group name and then click on “Add”.



- iv. The screen will automatically refresh with the new Group added to the list

### c. To Delete a Group Name


- i. On the Group Name list, click on the group name you want to delete.
- ii. When that group screen appears, remove the checkmark next to “Active”.



- iii. Click “Update”.
- The system will not delete the group, but it will make it inactive.

### d. Assigning Groups

- To Assign a participant to a group,



- i. Go to the Menu and select Groups > Assign Groups
- ii. The Assign Groups screen will appear. Under “Select Group” use the up/down arrows to select the desired group.



- iii. Upon selection of a Group (example: \*\*Heart Failure High Tech), the system displays a list of participants.

<b>Active?</b> <div>Active</div>	<b>Select Group</b> <div>**Heart Failure High Tech</div>
<b>Select Participants to Add to Group</b> <div>             *Jill, Patient              Add, Test              Anderson, App              Appleseed, Stephen              Astaire, Fred              Bailey, George              Baker, David              Banks, Ernie              Baum, Kevin M              Baum, Kevin Group           </div>	<b>Participants Assigned to this Group</b> <div></div>
<div> <div>Add &gt;&gt;</div> <div>&lt;&lt; Remove</div> </div>	

- iv. Select a Participant from the “Select Participants to Add to Group” list and click on the Add button. Their name will appear in the list on the right.

<b>Active?</b> <div>Active</div>	<b>Select Group</b> <div>**Heart Failure High Tech</div>
<b>Select Participants to Add to Group</b> <div>             *Jill, Patient              Add, Test              Anderson, App              Appleseed, Stephen              Baker, David              Baum, Kevin M              Baum, Kevin Group              Baum, Maceo Dog              Baum, Maya MackenzieD              Baum, Tyler Jackson           </div>	<b>Participants Assigned to this Group</b> <div>             Astaire, Fred              Bailey, George              Banks, Ernie              Bond, James           </div>
<div> <div>Add &gt;&gt;</div> <div>&lt;&lt; Remove</div> </div>	

### e. To Delete a Participant from the Group

- Select the name from the “Participants Assigned to this Group” list and click on the Remove button. The name will appear back in the list on the left.

### f. Assigning Groups from a Participant Data File

- See the description regarding adding Participants from a data file. This same file can contain Group Assignment information for each Participant.

**Contact TouchPoint Care to provide you with the “Participant Interface Specifications” document and the SFTP server I.P. address, login, and password.**

## 7. Manage TouchPoints - Create TouchPoints

The Concept:

- In the TouchPoint Care system, the TouchPoint is where the user associates Participants or Groups with a specific Question Series and establishes the type of contact and the schedule of contact with each Participant.
- Where a TouchPoint has multiple scheduled contacts, each specific scheduled contact is called an instance of that TouchPoint.

### a. Create TouchPoint

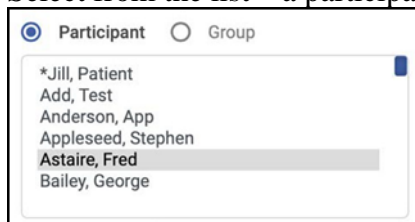
- To create a TouchPoint:
  - Go to the Main Menu, select TouchPoints > Create TouchPoints



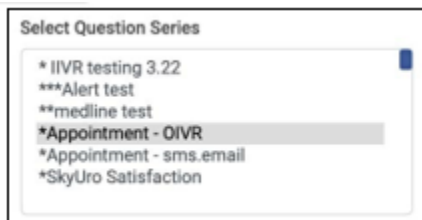
- Give TouchPoint a name



- Select from the list – a participant or group



- Select from the list – The Question series for that participant or group





- Upon clicking on “Create TouchPoint”, the user is immediately presented with a TouchPoint Rules screen to review the settings that were selected.

[Create Touchpoint](#)

### TouchPoint Rule: Enter TP Name Here

TouchPoint Name:	Enter TP Name Here	Question Series:	*Appointment - OIVR
Group:	**Heart Failure IIVR	Recurs:	Yes
Start Date	4/1/2020 12:00:00 AM	Occurrence:	Monthly
Duration:	180	Monthly Rule:	Every First Monday of every 1 Month(s)
Start Time:	10:00 AM		
Expiration:	No Expiration		
Task:	IIVR Outbound Call		
Phone To Use:	Primary		

Add New Participants to TouchPoint Immediately?: ☐ No

Call Agent Greeting [Insert Dynamic Data](#)

Provider Welcome Message

Comments:

[Update](#)

[TP Rules](#)
[TP Exception Rules](#)
[Alerts by Participant](#)
[Alerts & Assign to Groups](#)

- The user may also set and edit rules and alerts using TP Rules, TP Exception Rules, Alerts by Participant, and Alerts & Assign to Groups tabs.

[TP Rules](#)
[TP Exception Rules](#)
[Alerts by Participant](#)
[Alerts & Assign to Groups](#)

- TP Rules – The user can elect to override the system level Contact Rules, established in the Company Profile, and define Contact Rules specific to this TouchPoint.

### TouchPoint Rule: Enter TP Name Here

TouchPoint Name:	Enter TP Name Here	Question Series:	*Appointment - OIVR
Group:	**Heart Failure IIVR	Recurs:	Yes
Start Date	4/1/2020 12:00:00 AM	Occurrence:	Monthly
Duration:	180	Monthly Rule:	Every First Monday of every 1 Month(s)
Start Time:	10:00 AM		
Expiration:	No Expiration		
Task:	IIVR Outbound Call		
Phone To Use:	Primary		

Add New Participants to TouchPoint Immediately?: ☐ No

Call Agent Greeting [Insert Dynamic Data](#)

Provider Welcome Message

Comments:

[Update](#)

[TP Rules](#)
[TP Exception Rules](#)
[Alerts by Participant](#)
[Alerts & Assign to Groups](#)

- TP Exception Rules

### TouchPoint Exception Call Result Rules

Call Result	Participant Inactivated:	Participant Removed From Group:	Email Alert:	Alert Address*:
Bad Data	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="dave@touchpointcare.com"/>
Uncooperative	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="dave@touchpointcare.com"/>
Deceased	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="dave@touchpointcare.com"/>
Does Not Speak English	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="dave@touchpointcare.com"/>
Participant in Hospital	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="dave@touchpointcare.com"/>
Cancel Instance	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="dave@touchpointcare.com; danderson@"/>

\* Leave blank and alert emails are sent to provider administrator (kbaum@touchpointcare.com)

[Save](#)

- Alerts by Participant – The user can elect to set participant Specific alerts that will override previously set Global alerts.

### Manage Alerts by Participant

Select a Provider: TPC- acme testing [\[Change\]](#)

Select a Participant:

Select a Series :

- Alerts & Assign to Groups – The user can elect to Set/Edit Global Question Alerts at this time. Any changes to existing Global Alerts will cause historic data, if any, to be lost.

### Manage Alerts/Assign to Group by Question

Select a Provider: TPC- acme testing [\[Change\]](#)

Select a Series :

Select a Series :

Select a Series : COPD [\[Change\]](#) [\[Review Series\]](#)

Series Questions:

- ☐ Cardiac
  - ☒ On a scale of 1 to 10, with 10 being wonderful, how are you feeling today?
- ☐ COPD
  - ☒ On a scale of 1-10, with 10 being worst, how would you rate your Shortness of Breath?
  - ☒ On a scale of 1-10 with 10 being worst how would you rate your cough?
  - ☒ How would you rate your Sputum amount with 10 being worst?
  - ☒ How would you describe your sputum color?
  - ☒ How would you describe your sputum consistency?
  - ☒ How many seconds can you hold your breath?
- ☐ Cardiac
  - ☒ Are you having any chest pain?

## b. Task

- Select the TouchPoint task of Live Outbound Call, Live Inbound Call, Internet, IVR Inbound Call or IVR Outbound Call.

- **A Live Outbound Call** task designates that a live person will call each Participant on the phone to ask them the Question Series and record the responses.
- **A Live Inbound Call** task designates that each Participant will call a user defined phone number where a live person will ask them the Question Series and will record their responses.
- **An Internet** task designates that the Participant will log onto the TouchPoint Care secure web site and answer the Question Series online.
- **The IVR Inbound Call** task designates that each Participant will call a user defined phone number where an Interactive Voice Response system will ask them the Question Series and will record their responses.
- **The IVR Outbound** task designates that the Interactive Voice Response system will call the Participant and will ask them the Question Series and will record their responses.

## c. Creating the Contact Schedule

- The TouchPoint Care system has developed a sophisticated, yet simple to use, scheduling process that allows the user to create any possible contact schedule.
  - Recurring – The first step is to decide if the contact schedule is “Recurring” or more than one instance. If there is only one instance, select “No Recurrence”. Otherwise, select Daily, Weekly, or Monthly to create the desired “recurring” contact pattern. The Random Choice allows the user to select specific dates for the contact schedule.

Recurring?

☐ No Recurrence

☐ Daily

☐ Weekly

☐ Monthly

☐ Random (Select Dates)

- Start Date – The next step is to select the Start Date for when the first scheduled contact should take place.


Start Date



- End Date– By selecting and entering an End Date, the system will ensure that no TouchPoint instances will occur after that date.

Select an End Date or Duration

☐ End Date




☒ Duration

Day(s)

- End Date Example: On any date, say June 1, a TouchPoint creation begins with the Group associated with the Series. The intended contact schedule is daily contact for 5 days and an end date of June 6, or 5 days from the Start Date of the TouchPoint.


Start Date



Start Time

Select an End Date or Duration

☒ End Date



☐ Duration

Recurring?

☐ No Recurrence

☒ Daily

☐ Weekly

☐ Monthly

☐ Random (Select Dates)

☒ Every 1 days

☐ Every Week Day

Advanced

- Duration - On the other hand, the Duration option enables the user to repeat a non-random contact schedule for each Participant added to the Group that is part of the TouchPoint.

The screenshot shows the 'Recurring?' section of the TouchPoint Care interface. The 'Duration' option is selected, and the duration is set to 10 days. The 'Start Date' is 06/01/2020, and the 'Start Time' is 10:00 AM. The 'Phone Number' is set to Primary. The 'Expiration' is set to 10 days, 0 hours, and 0 minutes. The 'Add New Participants' checkbox is checked. The 'Call Agent Greeting' section shows a 'Provider Welcome Message'.

- By selecting Duration and entering 10 days, the system has been programmed to do the following automatically:
  - All participants in the Group on Start Date of June 1 will have a daily contact schedule with 10 instances, beginning June 1 and ending in 10 days on June 11.
  - For any new Participant added to the Group after June 1, the system will repeat the entire schedule. A Participant added to the Group on June 2 will have a start date of June 2 with a scheduled contact every day for 10 days. A Participant added on June 3 will have a start date of June 3 with a scheduled contact every day for 10 days, etc, etc.
- Duration Example: A TouchPoint is created with a start date of January 1 and a contact schedule of weekly on Monday, Wednesday, and Friday for a period of three months. By selecting Duration of 90 days the system formula will schedule contacts two days after a Participant is added to a Group for every Monday, Wednesday, and Friday for 90 days.

The screenshot shows the 'Recurring?' section of the TouchPoint Care interface. The 'Duration' option is selected, and the duration is set to 90 days. The 'Start Date' is 01/01/2020, and the 'Start Time' is 10:00 AM. The 'Phone Number' is set to Primary. The 'Expiration' is set to 90 days, 0 hours, and 0 minutes. The 'Add New Participants' checkbox is checked. The 'Call Agent Greeting' section shows a 'Provider Welcome Message'.

- Duration is a very powerful TouchPoint Care scheduling tool. By creating a TouchPoint and selecting Duration, a user can ensure that any time a Participant is added to the Group in that TouchPoint, that Participant will automatically receive that contact schedule.

- Start Time – Is the time of day when outbound, inbound and IVR calls will begin.

Start Time

10 00 AM

- Advanced Settings:

Advanced

- The Expiration: after “n” days means the user can decide to cancel or expire a TouchPoint instance scheduled after “n” days. This feature is generally used for Inbound calls.

Expiration After

0

Day(s)

0

Hour(s)

0

Minute(s)

- The option to “Add New Participants (Added to Group) to TouchPoint Schedule Immediately?” changes the default setting of the Duration “Start Date” formula explained above. When this option is selected it means that whenever a Participant is added to the Group in this TouchPoint, they will be included in the next scheduled contact and all subsequent scheduled contacts.

☐ Add New Participants (Added to Group) to TouchPoint Schedule Immediately?

- Example: The intended contact schedule has a Start Date of April 1 and is monthly for 6 months of contact. The Duration would be set for as many days as necessary to create six scheduled contacts, once a month, or 180 days.

Start Date

04/01/2020

Start Time

10 00 AM

Select an End Date or Duration

☐ End Date

☒ Duration

180

Recurring?

☐ No Recurrence

☐ Daily

☐ Weekly

☒ Monthly

☐ Random (Select Dates)

Day 0 of every 0 month(s)

☒ The first Monday of every 1 month(s)

Advanced

- Example: By Selecting “Add New Participants (Added to Group) to TouchPoint Schedule Immediately?”, the system is now programmed to do the following automatically:

☐ Add New Participants (Added to Group) to TouchPoint Schedule Immediately?

- All participants in the Group on April 1, will have a monthly contact schedule with 6 instances, beginning April 1 and ending in 6 months on September 1.
- For any new Participants added to the Group, the system will give them a Start date of April 2 with 6 schedule instances through September 1. Participants added to the Group through April 30 will have a start date of the next scheduled contact – May 1, with 6 scheduled instances through October 1, etc.

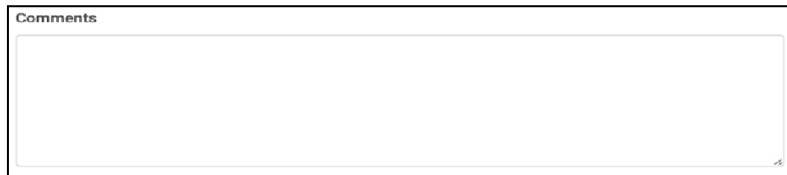
#### d. Call Agent Greeting

- The Call Agent Greeting default that is established at the Provider Profile may be overridden for each specific TouchPoint by typing in the desired greeting of up to 1000 characters.



#### e. Comments

- The information entered into the Comments field will be displayed on every Question Series screen associated with this TouchPoint, e.g. you may enter “In case of an emergency with any of these patients call 911”.





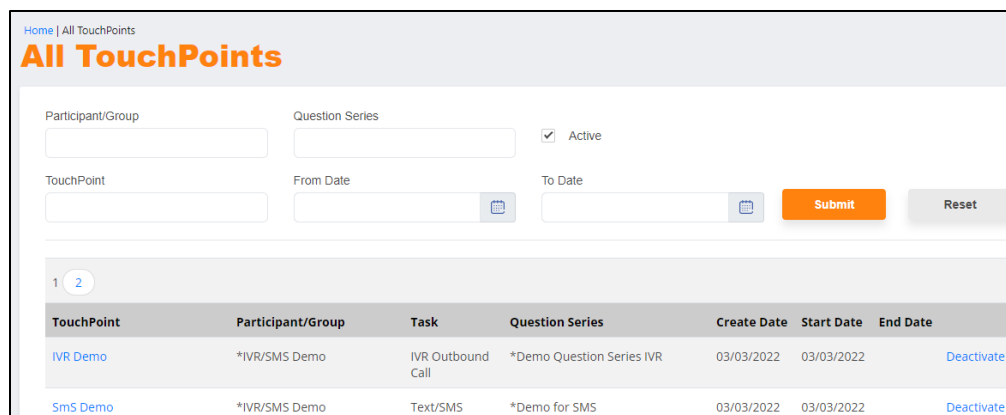
## 8. Manage TouchPoints – Review TouchPoints

- From the Main Menu, select TouchPoints > All TouchPoints and you are presented with a listing of all Active TouchPoints.



### a. Filters

- The All TouchPoints screen allows the user to search for any Active or Inactive TouchPoint by typing in any search criteria into the filter fields; TouchPoint name, Participant/Group name, Question Series name, From Date or To Date and selecting or deselecting Active.



Home | All TouchPoints

### All TouchPoints

Participant/Group:  Question Series:  ☒ Active

TouchPoint:  From Date:  To Date:

TouchPoint	Participant/Group	Task	Question Series	Create Date	Start Date	End Date
<a href="#">IVR Demo</a>	*IVR/SMS Demo	IVR Outbound Call	*Demo Question Series IVR	03/03/2022	03/03/2022	<a href="#">Deactivate</a>
<a href="#">SmS Demo</a>	*IVR/SMS Demo	Text/SMS	*Demo for SMS	03/03/2022	03/03/2022	<a href="#">Deactivate</a>

### b. TouchPoint Values

- Upon clicking on the TouchPoint name in the list, the system presents a screen with the TouchPoint values that were selected to initially create the Touchpoint. From this screen the user may also elect to Set/Edit Rules and Participant and question level Alerts. You can also edit the Agent Greeting and the TouchPoint Comments from this screen.
  - Use the tabs at the bottom of the TouchPoint Rule screen to make your edits.



TP Rules TP Exception Rules Alerts by Participant Alerts & Assign to Groups

- Click on the Update button to save the changes.

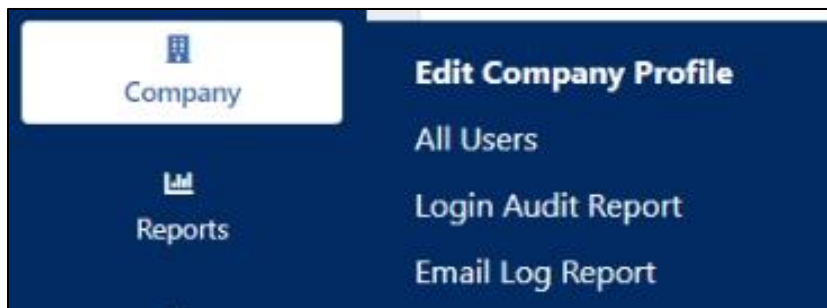


Update



## 9. Manage Company

- On the menu, select Company > Edit Company Profile. Select Provider Name and the “Details” section will appear.



### a. Details Section

- The fields with the red (required) must be filled in. In the screen shot below, the required fields are Name, Phone, Admin, and Admin Email.

**Details** | Logo | Custom | IVR | Security | Interfaces | Dashboard | Care Mgt

**Name (required)** TPC- acme testing **Admin (required)** Dave **Admin Email (required)** kbaum@touchpointcare.com **Account Name** acme

**Address**  
 235 w cook Avenue  
 8478268209  
 Libertyville Illinois 60048  
 United States

**Phone (required)** 8478268209 **Alt Phone** 8478268209 **Fax** 312-220-9774

**Time Zone** GMT - 6 (US Central Time)

**Settings**

**Activations & Welcome Message**

**Child Providers**

- Name – This is the number for the Provider Name.
- Admin – This is the Provider’s personal contact.
- Admin Email – It is designed to notify the Company in the event that a scheduled outbound call resulted in either “Bad Data”, “Uncooperative”, “Deceased”, “Patient in Hospital” or “Does Not Speak English”.
- Phone – This is the Provider’s personal contact.
- Time Zone – Upon entering a Provider time zone, the system will automatically default all Provider Contacts and Participants to the Provider time zone. If a Provider Contact and/or Participant are located in a different time zone the system enables the user to adjust the time zone of each.
  - The system will automatically adjust the Call Schedule time based upon the Provider time zone, the Provider Contact/Call Agent time zone and the Participant time zone.

- Setting Sub-Section

- Click on the plus (+) sign next to the “Settings” header and that area will appear.



The screenshot shows the 'Settings' sub-section with the following fields and options:

- Alert Email Setting:** Includes a dropdown for 'Include Alert Details Without Participant Names'.
- URL:** A text input field.
- Default Dashboard:** A dropdown menu currently set to 'Dashboard - Clinical Management'.
- Questions per Page:** A text input field set to '20'.
- Maximum Call Attempts:** A text input field set to '8'.
- Default Task:** A dropdown menu set to 'All'.
- Use Series Name for Subject Line on Alert Emails?:** A checked checkbox.
- Show Custom Data on Alert Emails?:** A checked checkbox.

- Alert Email Setting – Setting for Display Preferences in email.
- URL – Custom URL setting.
- Default Dashboard – Select your preferred Dashboard view upon entering the Communication Center.
- Questions per Page – Allows the provider to specify how many questions they would like to appear at a time on the Call Agent screen for Outbound and Inbound calls, system default is one (1).
- Maximum Call Attempts
- Default Task – Select which task is to be performed.
- Use Series Name for Subject Line on Alert Emails? – This is explained when you hover the cursor over the blue question mark circle.
- Show Custom Data on Alert Emails?

- Activations & Welcome Message Sub-Section



The screenshot shows the 'Activations & Welcome Message' sub-section with the following fields and options:

- Activate CM:** A checked checkbox.
- Activate AllowVoiceRecord:** An unchecked checkbox.
- Allow Dash Customizations:** A checked checkbox.
- Activate PERS:** A checked checkbox.
- Welcome Message:** A text input field.
- Internet Welcome Message:** A text input field.

- Click on the plus (+) sign next to the “Activations & Welcome Message” header and that area will appear.
- Welcome Message – The Welcome message is a user defined script to be used by the Call Agent when making outbound calls or receiving inbound calls. This Welcome Message can be overridden at the individual TouchPoint level.
- Internet Welcome Message

- Child Providers Sub-Section

- Click on the plus (+) sign next to the “Child Providers” header and that area will appear.



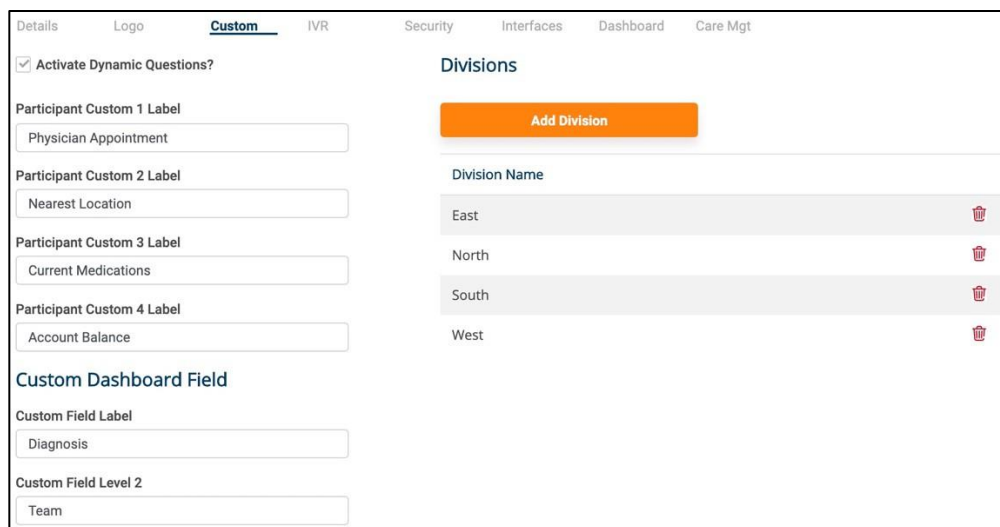
## b. Logo Section

- Under the Logo section, a specific logo in .jpeg or .gif format can be downloaded and displayed.



## c. Custom Section

- Divisions can be added by clicking on the “Add Division” button or deleted by clicking on the red trash can.
- Remember to click on the “Save” button.



## d. IVR (Interactive Voice Response) Section

- Hover the cursor over all the blue circle question marks for explanations.
  - Remember to click on the “Save” button.

## e. Security Section

- Check boxes for what is required in the password.
  - Remember to click on the “Save” button.

## f. Interfaces Section

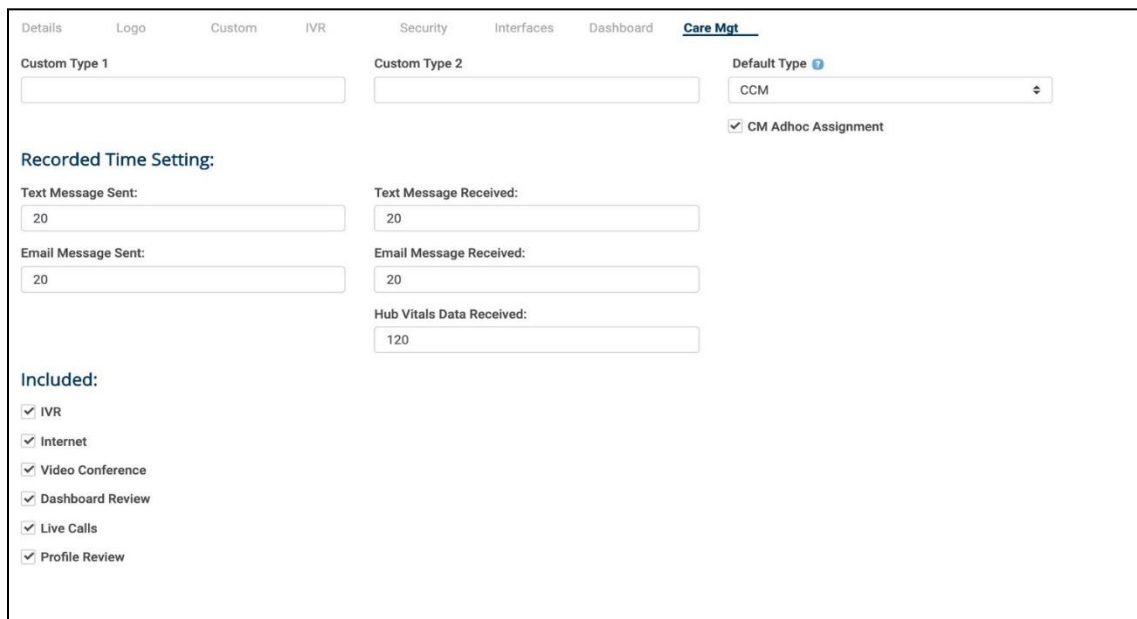
- Remember to click on the “Save” button.

## g. Dashboard Section

- The Dashboard section is for choosing what you see in the Clinical Management Dashboard – Communication Center.
  - Filter – Check boxes of what you want. Click on up/down arrows to see choices of each.
  - Data Columns
  - Medications – Click box if you want medications displayed.
    - Remember to click on the “Save” button.

## h. Care Mgt Section

- Remember to click on the “Save” button.



The screenshot shows the 'Care Mgt' section of the TouchPoint Care interface. It includes tabs for Details, Logo, Custom, IVR, Security, Interfaces, Dashboard, and Care Mgt. The 'Care Mgt' tab is active, showing fields for Custom Type 1, Custom Type 2, and Default Type (set to CCM). There is a checkbox for 'CM Adhoc Assignment'. Below these are 'Recorded Time Setting' fields for Text Message Sent, Email Message Sent, Text Message Received, Email Message Received, and Hub Vitals Data Received. At the bottom, there is an 'Included' section with checkboxes for IVR, Internet, Video Conference, Dashboard Review, Live Calls, and Profile Review.

## i. TouchPoint Rules

- Found under TouchPoints > Escalation Rules



- The TouchPoint Care system has been created to enable a non-clinician to act as the Call Agent to ask the questions and record the Participant responses. This Call Agent may be a Provider employee or a contracted third party. The Rules are designed to enable a Provider to automate the system behavior in the event that an outbound call results in no contact with the Participant.
- The Rules also let the provider determine how many Outbound Call attempts to reach the participant are to be made for each scheduled call. The Outbound IVR call attempts will use these same rules and follow the same procedures as the outbound attempts. However, since it is automated, the Unavailable rule will not apply. If the call is answered and the participant is not available to answer the questions the call will be marked as Interrupted and will have to be manually processed.
- Provider Defined Rules:
  - The Provider can control the system action based upon any of four Call Results that

indicate there was no contact with the Participant for up to four attempts.

- The four Call Results are: “Busy”, “No Answer”, “Unavailable” or “Voice Mail”. The system allows the Provider to control the action unique to each Call Result after each attempt. The Provider can have the system automatically “Reschedule” the call for some later point in time. The Provider can also change the “Task” after one or more attempts.
- Remember to click on the “Create Rule” button.

**Current Provider Rules for TouchPoints**

Attempt:	For Call Result:	Change Task To:	and/or	Reschedule For:	Email Alert?	Delete?
#1	Busy	No Change		5 Minutes		
#1	No Answer	No Change		5 Minutes		
#1	Unavailable	No Change		5 Minutes		
#1	Voice Mail	No Change		5 Minutes		
#2	Busy	No Change		Complete Call (Max Calls)	Yes	
#2	No Answer	No Change		Complete Call (Max Calls)	Yes	
#2	Voice Mail	No Change		Complete Call (Max Calls)	Yes	
<b>Message:</b>		We're sorry we missed you when we called, please call us back at 888-888-8888				

**Create Provider Rules for TouchPoints**

Attempt: #1 #2 #3 #4 #5

For Call Result: Busy No Answer Unavailable Voice Mail

Change Task To: No Change

and/or

Reschedule For: 0

Email Alert?: ☐

**Create Rule**

**Change Task To:**

and/or

**Reschedule For:**

**Email Alert?:**

**Create Rule**

- ✓ No Change
- Device Delivered
- Email
- Internal
- Internet
- IVR Inbound Call
- IVR Outbound Call
- Live Inbound Call
- Live Outbound Call
- Text/SMS
- Video Conference

**Change Task To:**

and/or

**Reschedule For:**

**Email Alert?:**

**Create Rule**

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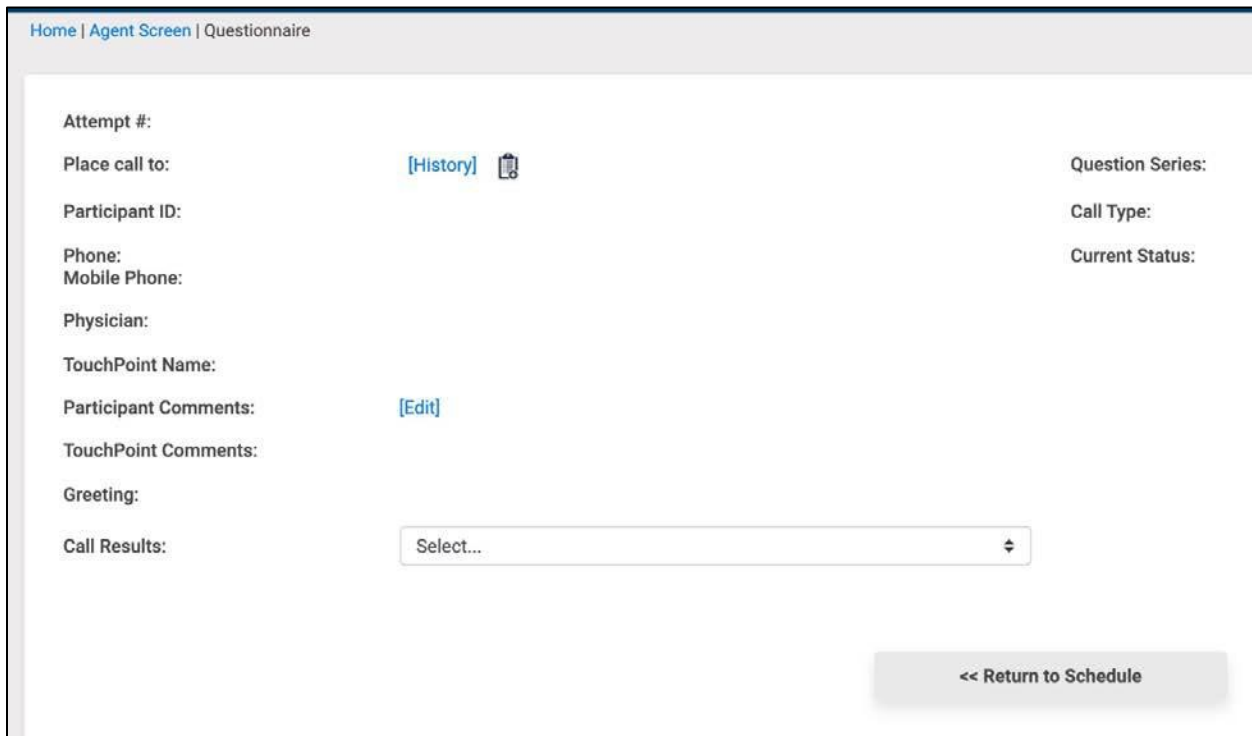
No Change

- ✓ 0
- 5 min
- 15 min
- 25 min
- 35 min
- 45 min
- 1 hour
- 4 hours
- 8 hours
- 24 hours
- Continue Calling
- Complete Call (Max Calls)
- Cancel Remaining TouchPoints

## j. Call Agent Screen

- When a Call Agent makes a selection from the Call Results menu on the Call Agent screen, the system will automatically follow the Rules established. Further, the Rules can be specific to a single TouchPoint. Thus, a Provider can establish Rules that are the default for all Call Schedules, yet, override them for one or more specific TouchPoints.

- Call agent Screen:



The screenshot shows a web application interface for a call agent. At the top, there is a navigation bar with links: Home | Agent Screen | Questionnaire. The main content area contains several form fields and buttons:

- Attempt #:** A text input field.
- Place call to:** A text input field with a [\[History\]](#) link and a clipboard icon.
- Participant ID:** A text input field.
- Phone:** A text input field.
- Mobile Phone:** A text input field.
- Physician:** A text input field.
- TouchPoint Name:** A text input field.
- Participant Comments:** A text input field with an [\[Edit\]](#) link.
- TouchPoint Comments:** A text input field.
- Greeting:** A text input field.
- Call Results:** A dropdown menu with the text "Select..." and a downward arrow.
- Question Series:** A text input field.
- Call Type:** A text input field.
- Current Status:** A text input field.

At the bottom right, there is a button labeled "<< Return to Schedule".

- System Default Rules:

- These Five Call Results – “Bad Data”, “Uncooperative”, “Deceased”, “Does Not Speak English”, and “Participant in Hospital” – result in a system default whereby and email is sent to the provider Admin email address indicating that an attempt to contact a Participant had one of these five results.
- The system also inactivates the Participant and suspends any remaining scheduled calls.
- The Provider is responsible for correcting the Bad Data or resolving the language or cooperation issue and reselecting the Participant as “Active”. Upon reactivating a Participant, all remaining scheduled calls will be reinstated.

- Call Result Alerts:

- During the setting of Call Result Rules, the Provider can also elect to have email alerts sent to the Provider Admin email address if a Call Result of “Busy”, “No Answer”, “Uncooperative” or “Voice Mail” occurs.



- The user can determine after which call attempt and for which of the above Call Results an alert e-mail will be sent. In the below screen shot, an email Alert will be sent if the second call attempt results in a Call Result of “Busy”, “No Answer”, “Unavailable” and “Voice Mail”.

### Current Provider Rules for TouchPoints

Attempt:	For Call Result:	Change Task To:	and/or	Reschedule For:	Email Alert?	Delete?
#1	Busy	No Change		5 Minutes		
#1	No Answer	No Change		5 Minutes		
#1	Unavailable	No Change		5 Minutes		
#1	Voice Mail	No Change		5 Minutes		
#2	Busy	No Change		Complete Call (Max Calls)	Yes	
#2	No Answer	No Change		Complete Call (Max Calls)	Yes	
#2	Voice Mail	No Change		Complete Call (Max Calls)	Yes	
<b>Message:</b>		We're sorry we missed you when we called, please call us back at 888-888-8888				

### Create Provider Rules for TouchPoints

**Attempt:**  
 #1  
 #2  
 #3  
 #4  
 #5  
 ...

**For Call Result:**  
 Busy  
 No Answer  
 Unavailable  
 Voice Mail

**Change Task To:**  
 and/or  
**Reschedule For:**  
 Email Alert?

No Change  
 0  
☐

Create Rule

### Create Provider Rules for TouchPoints

**Attempt:**  

#1  
 #2  
 #3  
 #4  
 #5  
 ...

**For Call Result:**  

Busy  
 No Answer  
 Unavailable  
 Voice Mail

**Call Results:**  

☒ Select...  
☐ Call Answered  
☐ Busy  
☐ No Answer  
☐ Unavailable  
☐ Rescheduled  
☐ Voice Mail  
☐ Bad Data  
☐ Uncooperative  
☐ Deceased  
☐ Does Not Speak English  
☐ Participant in Hospital  
☐ Cancel Instance

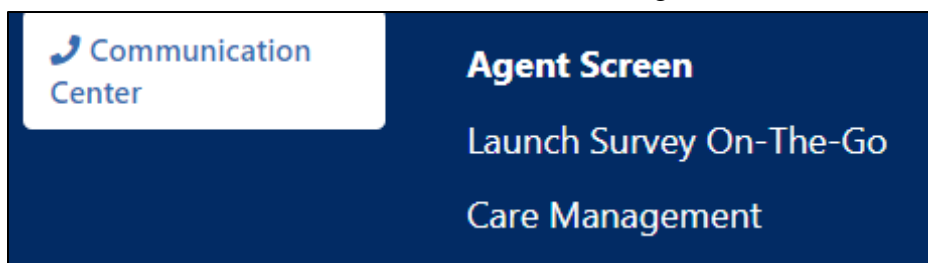
## 10. Communication Center

### The Concept:

- The TouchPoint Care system was designed to enable a Provider the option to separate the tasks of defining the information to be gathered from Participants and the actual task of making the phone calls, asking the questions and recording the responses.
- The Communication Center functionality was designed so that the Provider can use an employee (non-clinician) referred to as Agent, to make or receive the phone calls or a third-party call center.

### a. Agent Screen

- From the Main Menu, select Communication > Agent Screen

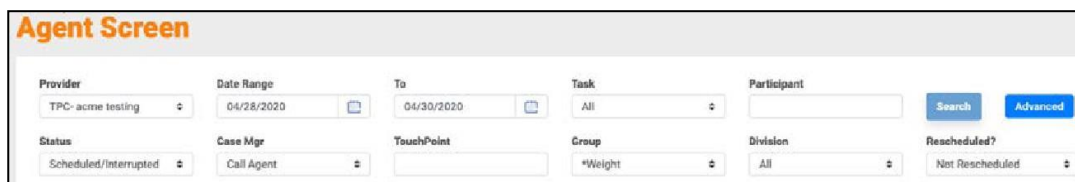


- When a TouchPoint is created and saved, the TouchPoint Care system creates a schedule for each contact and displays that schedule on the Agent screen. Each “Scheduled” call is designated with a green dot. The information is presented in chronological order, by date and then by the contact Start time established in the TouchPoint creation. In addition to scheduled calls, the default Agent screen also displays “Interrupted” calls marked with a yellow triangle.
- Click on the Advanced button to see more filters.

**Advanced**

- Filters - The Agent screen has numerous filters to enable the Provider and multiple Agents to manage and organize their work. The various fields that the system can filter and sort the schedule on are:
  - **Status** – All, Scheduled/Interrupted, or In Progress – the default Call Agent screen displays “Scheduled/Interrupted” calls.
  - **Date** – From (any) date – To (any) date
  - **Task** – Email, Live Inbound Call, Device Delivered, Internal, Internet, IVR Inbound Call, Live Outbound Call, Text Message, IVR Outbound Call

- **Participant** – Person’s name



The Agent Screen search form includes the following fields:

- Provider:** TPC- acme testing
- Date Range:** 04/28/2020
- To:** 04/30/2020
- Task:** All
- Participant:** (empty)
- Status:** Scheduled/Interrupted
- Case Mgr:** Call Agent
- TouchPoint:** (empty)
- Group:** \*Weight
- Division:** All
- Rescheduled?:** Not Rescheduled

Buttons: Search, Advanced

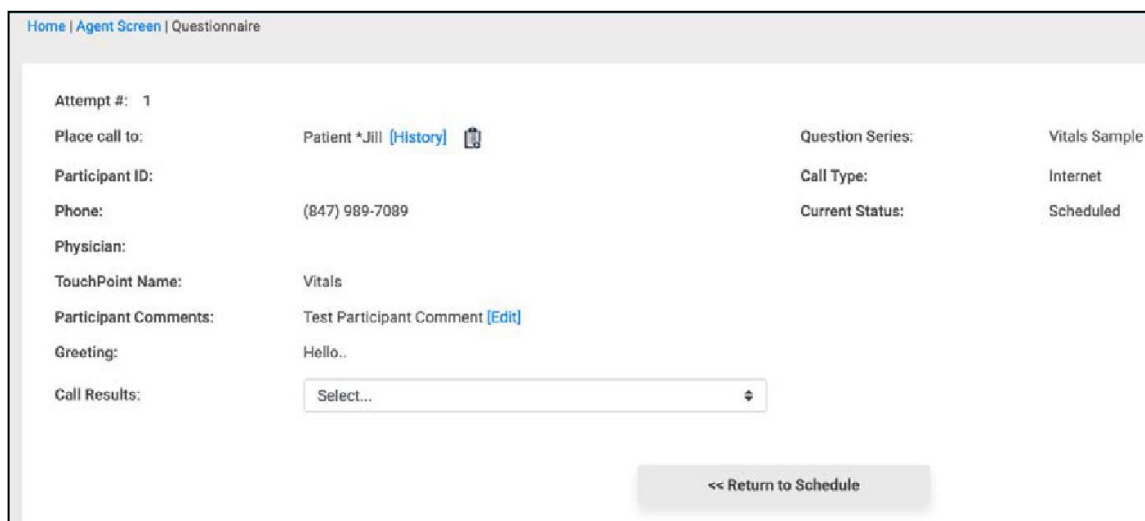
- Upon making the various filter choices and clicking on the Search button, the system will display all of the scheduled contact information that meets the filter requirements.

- When done, click on the “Search” button.

**Search**

### i. Outbound Agent Actions

- To begin the outbound call contact process, the Agent clicks on the Participant name and then is presented with that Participants phone number and prepared Greeting. The Agent dials the phone number and asks to speak with the Participant and then records the Call Result.



Home | Agent Screen | Questionnaire

Attempt #: 1

Place call to: Patient \*Jill [History] [Icon]

Participant ID:

Phone: (847) 989-7089

Physician:

TouchPoint Name: Vitals

Participant Comments: Test Participant Comment [Edit]

Greeting: Hello..

Call Results: Select...

Question Series: Vitals Sample

Call Type: Internet

Current Status: Scheduled

<< Return to Schedule

- Call Result – The Call Result drop down box lists the various results of this attempted phone call. The Agent simply selects one of the appropriate choices.

### ii. Question Call Results

- If the participant Answers and is available, the Agent selects, Call Answered and the system automatically presents each question to be asked of that Participant. Click on the Next button to move to the next question.

The screenshot displays the TouchPointCare interface. At the top, a message reads: "Hello, this is TouchPointCare calling to check on your health." Below this is a dropdown menu for selecting a call result. The options are: Select... (checked), Call Answered, Busy, No Answer, Unavailable, Rescheduled, Voice Mail, Bad Data, Uncooperative, Deceased, Does Not Speak English, Participant in Hospital, and Cancel Instance. Below the dropdown is a form with the following fields: Participant Name (Patient \*Jill ?), Physician, Dashboard Controls (Show/Hide | Open in New Window), Participant Comments (Test Participant Comment [Edit]), and a question "Have you checked your weight today?" with radio button answers "Yes" and "No". At the bottom of the form are three buttons: Back, Save & Return, and Next.

- The Call Result choices of Busy, No Answer, Unavailable or Voice Mail will follow the TouchPoint rules as described in the Provider Profile and Create TouchPoint sections.
- The Bad Data, Uncooperative, Deceased, Does Not Speak English, and Participant in Hospital choices follow the system default rules of:
  - Sending an e-mail to the system administrator notifying them of the call result for that Participant Alert ID.
  - Automatically marking the Participant “Inactive” and suspending all scheduled TouchPoint instances.
- The Provider is responsible for correcting the Bad Data or resolving the cooperation or language issue and reselecting the Participant as “Active”. Upon reactivating a Participant, all remaining scheduled calls will be reinstated.
- TouchPoint Rules:
  - The TouchPointCare system has been created to enable a non-clinician to act as the Agent to ask the questions and record the Participant responses. This Agent may be a Provider employee or a contracted third party. The Rules are designed to enable a Provider to automate the system behavior in the event that an outbound call results in no contact with the Participant. The Rules also let the provider determine how many Outbound Call attempts to reach the participant are to be made for each scheduled

call.

- Provider Defined Rules:
  - The Provider can control the system action based upon any of four Call Results that indicate there was no contact with the Participant for up to four attempts. The four Call Results are: Busy, No answer, Unavailable or Voice Mail. The system allows the Provider to control the action unique to each Call Result after each attempt. The Provider can have the system automatically “reschedule” the call for some later point in time. The Provider can also change the “Task” after one or more attempts.
  - When a Call Agent makes a selection from the Call Result menu on the Agent screen, the system will automatically follow the Rules established. Further, the Rules can be specific to a single TouchPoint (see Create TouchPoint section). Thus, a Provider can establish Rules that are the default for all Call Schedules, yet, override them for one or more specific TouchPoints.
- Rescheduled:
  - The “Rescheduled” call result choice gives the Agent the ability to override the TouchPoint Rules to reschedule a contact time from the dropdown list. The TouchPoint Rules will be effective for this new “Rescheduled” call.
  - If the Reschedule Call Result is selected on the final call attempt, as defined by the Rules, this scheduled call will remain on the schedule until it is completed by “Call Answered”.
  - **Call Agents are strongly recommended to NOT select rescheduled on the last scheduled call attempt!**

### iii. Recording responses

- When the Agent begins to ask the Participant the questions, the Agent clicks on the response given by the Participant to record their answer. Where the question requires a numerical response or a text response, the Agent will type the response into the dialog box.

Participant Name: Patient \*Jill ?

Physician:

Dashboard Controls: [Show/Hide](#) | [Open in New Window](#)

Participant Comments: Test Participant Comment [\[Edit\]](#)

Using your key pad, or stating one digit at a time, what was your weight today?

Number:

(decimals will be rounded to the closest hundredth)

- Editing Responses:

- By clicking on the Back button on the question screen the Agent can edit the response to the previous question.



#### ○ Interruptions to the Call:

- If a question session is interrupted by the Participant and the call is ended before all the questions have been asked and answered, the Agent can click on the Save & Return button to save the responses to the questions that were asked up to that point. The system will automatically mark the call as “Interrupted” and return it to the Agent default screen and mark it with a yellow triangle to indicate “Interrupted”. When the Agent reconnects with the Participant and selects “Call Answered” the system automatically restarts the Question Series at the first unanswered question in the Series.



Agent Screen							
Provider	Date Range	To	Task	Participant			
TPC- acme testing	04/30/2020	05/02/2020	All		Search	Advanced	
Daily Participant Schedule							
Participant	Scheduled Time:	TouchPoint Name:	Series Name:	Provider:	Task:	Care Mgt ↔	Risk score
▲ Baum, Kevin M	5/1/2020 12:29:48 PM	Physician Satisfaction Survey TouchPoint	Physician Satisfaction	TPC- acme testing	Internet	00:00:00	23.23
▲ Baum, Kevin M	5/1/2020 12:29:51 PM	Physician Satisfaction Survey TouchPoint	Physician Satisfaction	TPC- acme testing	Internet	00:00:00	23.23

#### iv. Submit Questions

- Upon completion of the Question Series, the system will display all of the questions and all of the responses. Any of the question responses can be edited at this time if necessary. If no changes are required, the Agent selects the “Submit Questions and Return to Schedule” button and the system automatically stores all of the responses in the database and issues the e-mails based upon the Alerts

Participant Name:

Patient \*Jill ?

Physician:

Dashboard Controls:

Show/Hide | Open in New Window

Participant Comments:

Test Participant Comment [Edit]

Thanks!

Submit your responses by clicking the button below.

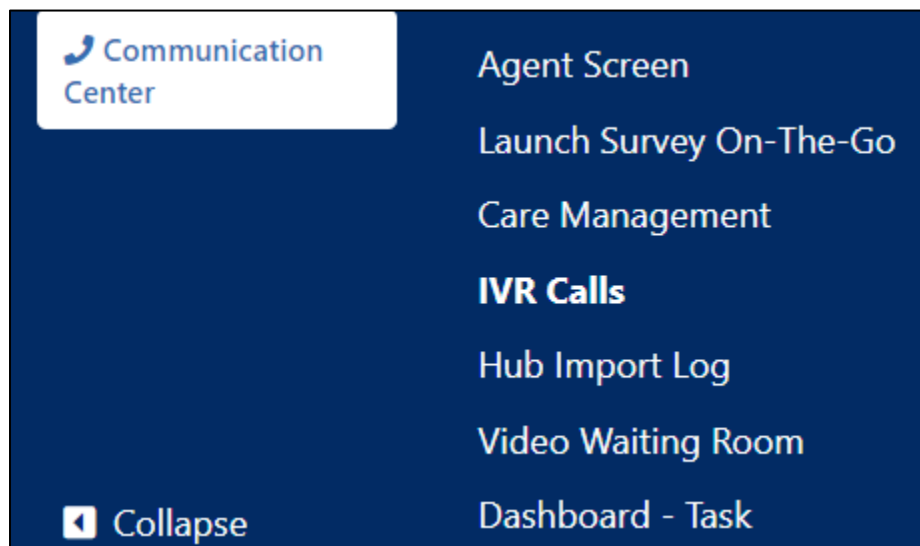
Submit Questions and Return to Schedule

## v. Inbound Agent Actions

- With a call from a Participant to the Provider, the Agent will select the Task of Inbound Call from the Agent Screen and click Submit. The system will display a list of scheduled Inbound calls for that day.
  - Upon identifying the Caller/Participant, the Agent clicks on their name from the list and the questions are immediately displayed. Recording the Participant responses behaves exactly the same as Outbound calls described above.

## vi. Managing IVR Calls

- IVR Calls are designed to be processed without any call agent involvement. However, the system provides you the ability to verify that scheduled calls were, in fact, processed.
  - If the IVR Status has: “Processed” then the IVR portion has finished.
  - If the Call Status has: “Completed” then all the questions have been answered and the call is complete.
  - If the Call Status is: “Interrupted” or blank, then the call has to manually completed. On the main menu select Communication Center > IVR Calls. You can select from various menu options to identify and resolve outstanding issues



## vii. Record Level Locking

- TouchPoint Care has implemented SQL Server record level locking on the Agent Screen.
  - Upon clicking on a Participant Name on the Agent grid:
    - Participant name is “locked” to the Agent’s user ID for 5 minutes

- If Agent returns to main screen without selecting a “Call Result” the call status remains as “Scheduled” (green dot) and the lock remains in effect
  - Upon selecting “Call Answered”
    - Status changed to “In Progress” (red square) and removed from main grid
  - Upon selecting any other “Call Result”
    - The TP rules control the system action, typically automatically rescheduled for a later point in time
    - The call remains in the “Scheduled” status (green dot) and remains locked to that Agent’s user ID for 5 minutes
  - If during recording responses to questions, the Agent is forced to end the call before completion of all the questions, the Agent should click on “Save & Return” and the system will:
    - Change call status to “Interrupted” (yellow triangle)
    - Lock the record to that Agent’s ID for 5 minutes
  - Agent records answers to all questions and clicks on “Submit & Return”
    - Status changed to “Completed” – taken off “In progress” call list
  - Agent mistakenly clicks on “Save and Return” before all questions are asked
    - Status changed to “Interrupted”
    - With Participant still on the phone the Agent should simply click on name and select “Call Answered”. System will resume at next question in series.
    - Complete questions, click on “Submit and Return”
  - Any attempt by an Agent to access a record that is “locked” will result in a default message indicating that the Participant record selected has been locked and the user must select another Participant record.
-



## 11. TouchPoint Care Security Overview

	Provider							Participant	
	Admin	Superv.	Cas e Mgr	Clerical	Physician	Call Agent	Report Viewer	User with Reports	User
Manage TouchPoints									
Create Touchpoints	Y	Y	Y-2	N	N	N	N	N	N
Review Touchpoints	Y	Y	Y-2	N	N	N	N	N	N
Manage Participants									
Add/Edit Participants	Y	Y	Y-2	Y	N	N	N	N	N
List Participant Groups	Y	Y	Y-2	Y	N	N	N	N	N
Manage Groups									
Create Groups	Y	Y	Y	Y	N	N	N	N	N
Assign Groups	Y	Y	Y-2	Y	N	N	N	N	N
List Groups	Y	Y	Y	Y	N	N	N	N	N
Manage Questions									
Create Questions	Y	Y	Y	N	N	N	N	N	N
Create Series/ Alerts	Y	Y	Y	N	N	N	N	N	N
Review Series/ Alerts	Y	Y	Y	N	N	N	N	N	N
Manage Alerts by Part.	Y	Y	Y	N	N	N	N	N	N
Manage Alerts by Ques.	Y	Y	Y	N	N	N	N	N	N
Manage Categories	Y	Y	Y	N	N	N	N	N	N
Manage Company									

Edit Profile	Y	Y-1	N	N	N	N	N	N	N
TouchPointRules	Y	Y	N	N	N	N	N	N	N
Manage Reports									
Report by Questions	Y	Y	Y-2	N	Y-2	N	Y	Y-3	N
Report by Part./ Groups	Y	Y	Y-2	N	Y-2	N	Y	Y-3	N
Report by Series	Y	Y	Y-2	N	Y-2	N	Y	Y-3	N
Daily Summary Report	Y	Y	N	N	N	N	Y	N	N
Line Graph	Y	Y	Y-2	N	Y-2	N	Y	Y-3	N
Bar Graph	Y	Y	Y-2	N	Y-2	N	Y	Y-3	N
Call Results Report	Y	Y	Y-2	N	Y-2	N	N	Y-3	N
Survey Report	Y	Y	Y-2	N	Y-2	N	N	N	N
Activity Log Report	Y	Y	Y-2	N	Y-2	N	N	N	N
Call Analysis Report	Y	Y	Y-2	N	N	N	N	N	N
Survey Report	Y	Y	Y-2	N	N	N	N	N	N
Interface Log	Y	N	N	N	N	N	N	N	N
Call Export	Y	N	N	N	N	N	N	N	N
Alert Analysis	Y	Y	Y	N	Y	N	Y	N	N
Call Agent Log	Y	N	N	N	N	N	N	N	N
Manage Call Center									
Agent Screen	Y	Y	N	Y	N	Y	N	N	N
Participant menu									
Edit Profile	N	N	N	N	N	N	N	Y-3	Y-3
View/Print Schedule	N	N	N	N	N	N	N	Y-3	Y-3
Answer My Questions	N	N	N	N	N	N	N	Y-3	Y-3
Logout	Y	Y	Y	Y	Y	Y	Y	Y	Y

Note 1 - Supervisor cannot Add/Edit/Delete other Supervisors

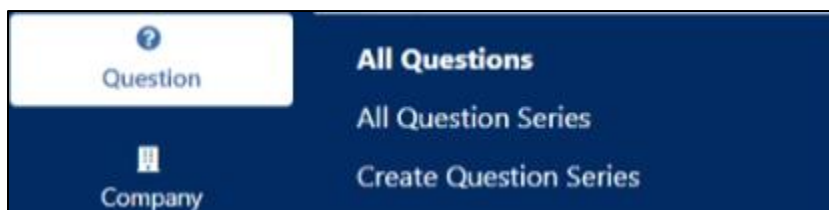
Note 2 - User can only do these functions for Participants assigned to them

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## 12. Frequently Asked Questions

- **How can I send a participant a LINK of a Survey?**
  - Go to > Communication Center > Survey On the Go > Then, Choose survey you want to send > Copy and Paste as Question in Question Library (Create a Folder for Links, or paste link in folder with related content)
  - Then Create Series using the “Link” question. This series is now ready to be sent out as a link, this works best with SMS or EMAIL Touchpoints. Will not work with IVR.
- **How can I connect Bluetooth Devices to the app?**
  - Go to BYOD App and then Settings > Choose the device type and then Make and Model. If you are still having trouble connecting your device, go to your phone settings and make sure your BYOD app is allowing new Bluetooth Connections.
- **How do I see my CPT Code report for billing?**
  - Go to Communication Center> Care Management > Select Date Range > Export > CM CPT Report
  - On Care Management Page, click names of Participants to view individual time instances.
- **The difference between the Question library and series?**
  - The question library stores all questions for surveys and care plans, all library questions can be used in multiple series. A series is the “questionnaire” that gets attached to a group when creating a TouchPoint. When creating a series, you choose the questions, question order, assign alerts/ send to new group settings. You can complete all question/ series creation under the Questions tab.
- **What is the purpose of a Group?**
  - A group acts as a Care plan for participants. Groups have preexisting TouchPoints attached to them, so as soon as someone is added to a group, they are automatically enrolled in receiving the contents intended for that group.

- **How can I start a video chat?**
  - The Video Chat Icon is located on the top right of the platform. Participants or Providers can be invited via Email, Phone Number, or BYOD on this page.
  - To schedule a Video Conference, go to a participant's profile >> Appointments >> Schedule and add them to Video Conference Group (Make sure there is a TouchPoint attached to the Group with the task set as Video Conference)
  
- **How can I customize my dashboard?**
  - Go to Company> Edit Profile> Dashboard. These settings allow you to select what fields are shown on the Dashboard. For Custom Dashboard fields, go to "Custom" Tab on the same page.
  
- **Where can I review how a participant responds to a survey?**
  - Go to Dashboard, Click the plus button next to a participant's name, this will create a dropdown of all recent TouchPoints the participant has received. Clicking on any one of them will open up the Report Viewer.
  
- **Where can I set Alerts?**
  - After selecting any Series under Question tab > All Questions, click Set/Edit Alerts.
  - On this page, you can manage questions
  - that send Participants to a new Group and
  - choose multiple emails for receiving alerts.



- **How do I create a working Reminder for an event or video chat?**
  - Reminders can be set to notify a participant of an upcoming event via any Task method, most often SMS, Email, or BYOD. Under TouchPoints > Create Reminder, choose the Participant or Group, and then a Reminder Series. Choose the amount of time to send Reminder before event.

- Example: Create a group for Video Chat Participants, then attach a Reminder to this group, now this group will be ready to send a reminder to anyone who has a Video Chat conference on their schedule.
- **How to make sure your Vitals Questions get reflected onto the Dashboard.**
  - First, go to your Question Library, then find the questions you use for collecting vitals, click any question and make sure there is a corresponding vital in the “special type” field.

- **How to Manage Access Levels**
  - In Company >> Access Levels, you can view all pre-existing roles and tasks they are permitted to, as well as create Custom Access Levels. Access Levels are then assigned on the Company >> Add/ Edit Provider Contacts page.
- **How to I change CM type for an instance, from CCM to RPM?**
  - In Participant Profile > Care Management > Care Management Activity,
  - you can view all instances of time collected with a patient. Edit any instances
  - by switching the CM type or create a manual entry.

