Help Guide

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:

ii. On the Menu, Select Company > All Users:
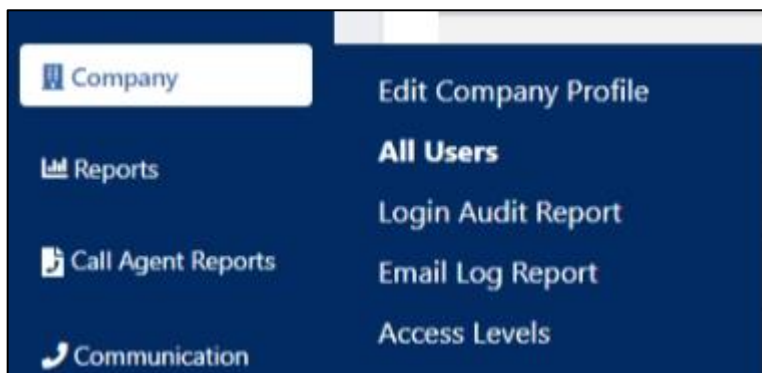
iii. Click on "Add User" on the top left
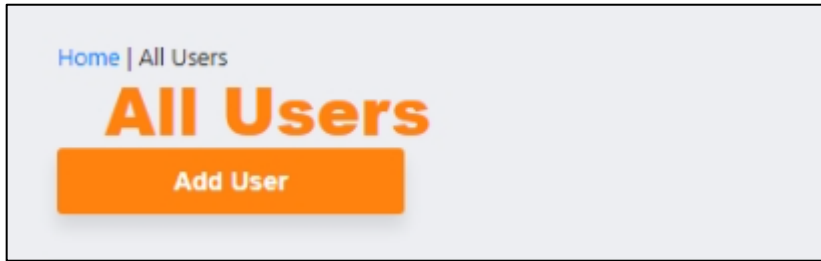
iv. The New Contact screen will appear. The unique Username and associated Password need to be assigned to each New Contact.

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

  i. On the menu, select Participants > All Participants. "Participant List" will appear.

  ii. Click on "Add Participant".

  iii. The "Participant Onboarding" Screen will appear.

  iv. 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.

  v. After all required fields are completed, click on the "Create" Button (orange).

vi. Click "Save and Close" (blue button).

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

b. Details Section
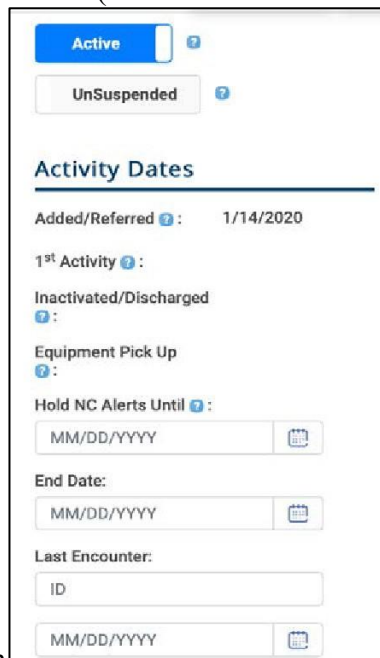
- Contact Information sub-section:
  i. Click on the plus (+) sign next to the "Contact Information" header

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

  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.
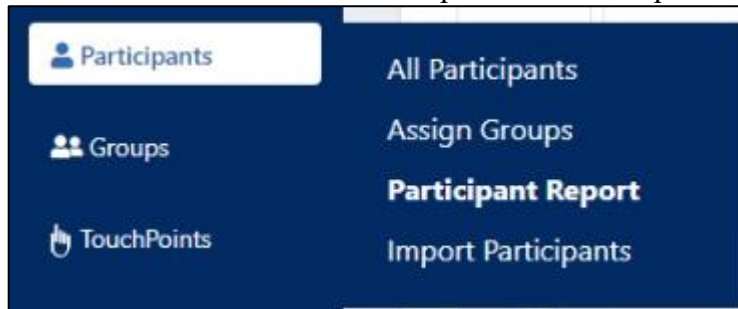
- Provider Unique ID
    - In addition to the system generated Alert ID, you can also enter a unique ID for each patient.
    - The Unique ID can be any combination of numbers and letters.
    - The provider's Unique ID, if any, will be displayed on all email alerts.
    - List of participants can be 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 and 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.
- o TouchPoint Care will poll the SFTP server periodically and when an XML file is detected, it is processed.
- o The Participant Interface has the ability to add Participants to a group.
- o The Interface also allows you to Inactivate and Activate participants are required.
- Editing Participant Data
  - o 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"

- 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.

iii.   You'll be taken to a page with the patients past vitals. In the top right, click on "New Vital Reading"

iv.   Then, select "Vial Type", and enter in a date for the reading.

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.

3. Create Question

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

To Create a Question:
   i.   Go to the Questions Tab
   ii.   Select All Questions
   iii. From the All Questions menu, you can add, change, and delete Categories and questions.
   iv. The + sign next to a Category or questions indicates that there are questions or follow-up questions associated with it.
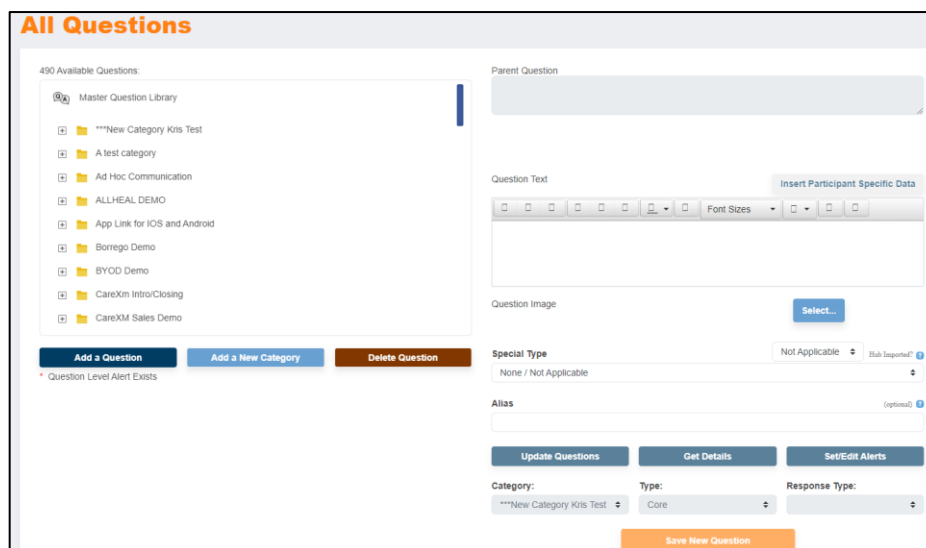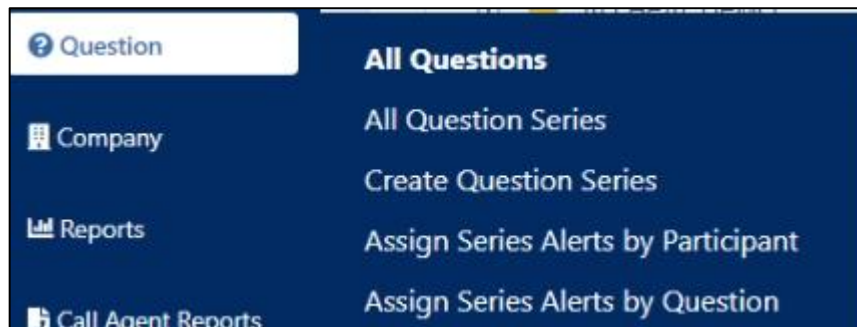
There are a few things you must know and understand when creating a Question and Series.

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.

Add a New Category

Manage Categories

Manage Categories For Provider: TPC- acme testing [change]			
New Category Name:	New Category Name		Add
ID	Category Name		
185	A Test Category	✎	✖
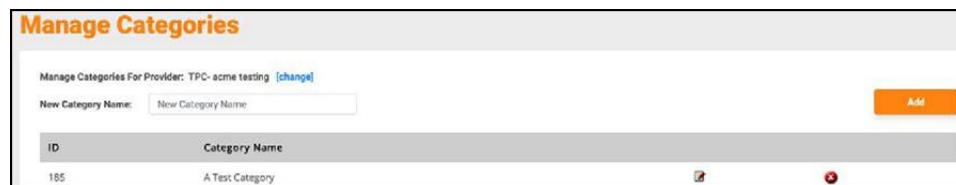
c. Creating Questions

- 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

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

1462 Available Questions:

⊞ 📁 Cardiac
⊞ 📁 Caregiving Documentation

Add a Question

Parent Question: Cardiac
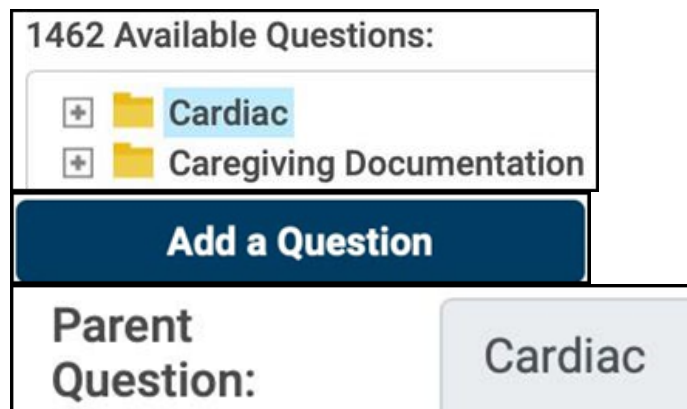
ii. Type in or copy & paste the question in the "Question Text." area.

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

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

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"

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.
  - o 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.
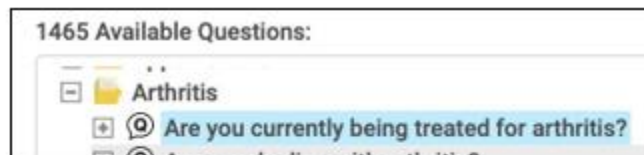> If the response to the Parent Question = "No" then ask this follow-up question.

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.
    - o To change the Response Type, you must either create a new question with the appropriate response type or delete and reenter the question.
    - o To edit the text, click on the question, make the necessary text edits and then click on Update Questions.

4. <u>Alerts</u>

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 Alertmay 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.

  o 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.
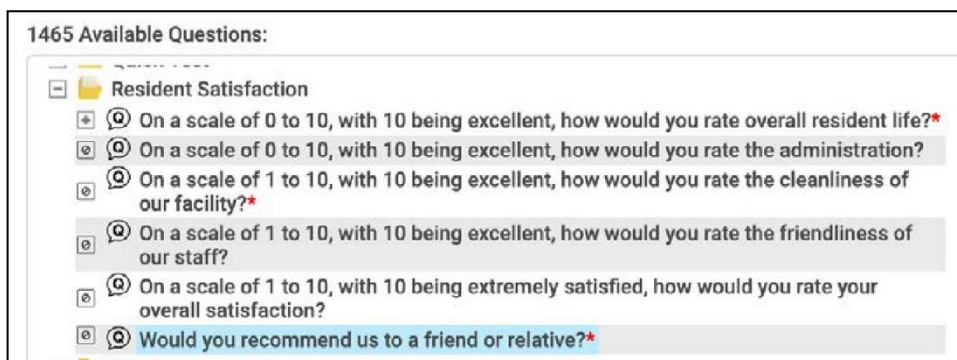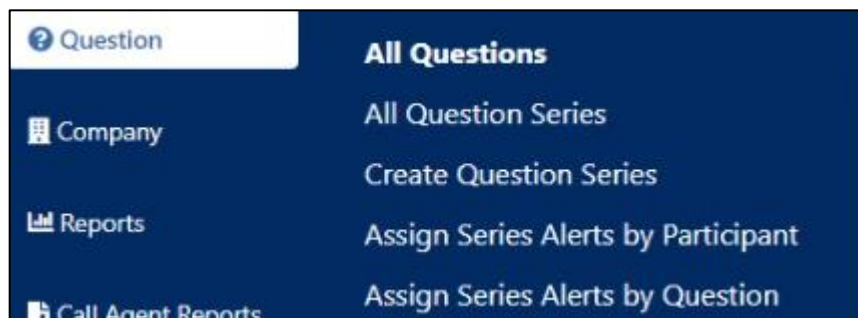
  ii. Click on Set/ Edit Alerts

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.

- 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.

- 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.

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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.

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 acollection 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:

    i.   From the Main Menu, select "Question" > "Create Question Series"
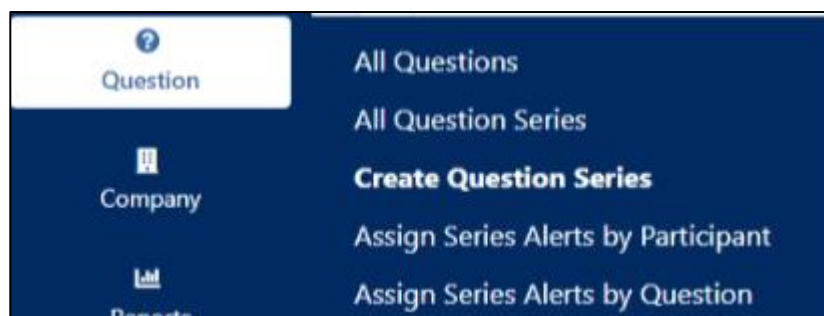
    ii.   Then select a Question Category which has the first question you want to add to a Series.The system will display all the questions in that Category.
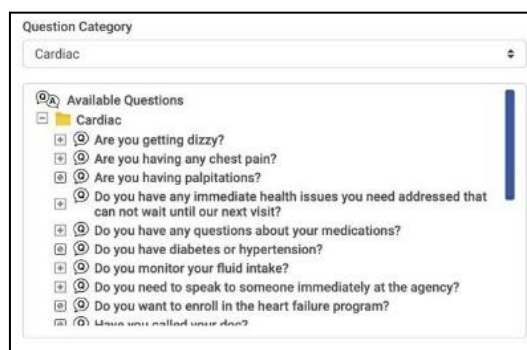
iii.   Click on the first question you want to add to a new series and then click on "Add" and that question will then be added into the Question Series box.

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 byTPC 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.

•   Follow up Questions:
   o   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)

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 aquestion that has already been used to collect responses in other Series the historic response data will only reflect the most recent Alert setting.

<div align="center">

Assign Series Alerts by Question

</div>

- 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: [Select... ⬍]

[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).

Update Alert and/or Assign to Group   Delete Alert

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.
  i. Click on "All Question Series"

ii.   Enter the Series name and click on the "Filter" button.

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.

- 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.   **Set/Edit 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.

- o 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 is 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.

6. <u>Manage Groups</u>
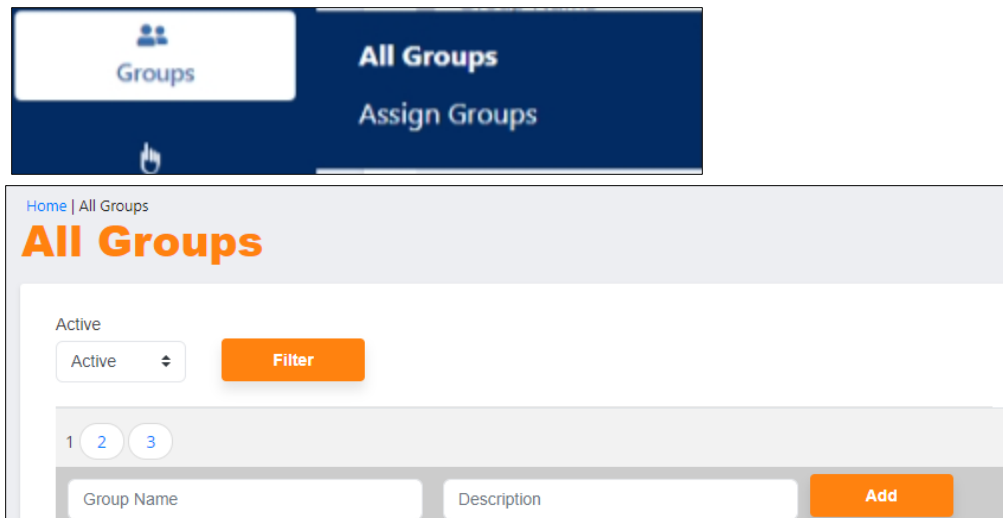
The Concept:
- Groups are designed to enable a Provider to create Question Series and Schedules that are common to a Group of Participants.
- Groups include one or more Participants.
- A Participant may be assigned to more than one Group.

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.
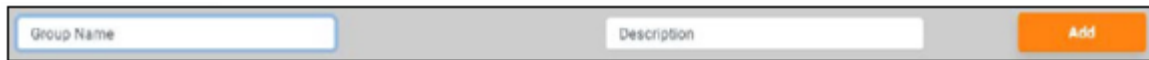
b. Creating Groups
- To Create a Group:
  i. Go to the Main Menu and select Groups > All Groups. The "All Groups" section will appear.

  ii. Before adding/creating a New Group, check the list under "Group Name" to make sure it doesn't already exist.

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.

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.

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
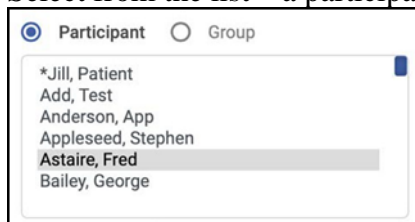
- To create a TouchPoint:
  - i. Go to the Main Menu, select TouchPoints > Create TouchPoints
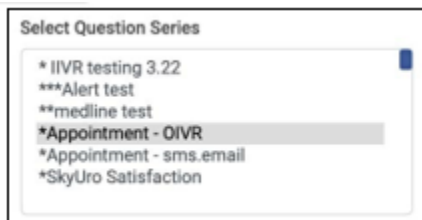
  - ii. Give TouchPoint a name

  - iii. Select from the list – a participant or group

  - iv. 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.

- 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.

  o 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.

  o TP Exception Rules

TouchPoint Exception Call Result Rules

Call Result	Participant Inactivated:	Participant Removed From Group:	Email Alert:	Alert Address*:
Bad Data	☐	☐	☑	dave@touchpointcare.com
Uncooperative	☐	☐	☑	dave@touchpointcare.com
Deceased	☐	☐	☑	dave@touchpointcare.com
Does Not Speak English	☐	☐	☑	dave@touchpointcare.com
Participant in Hospital	☐	☐	☑	dave@touchpointcare.com
Cancel Instance	☐	☐	☑	dave@touchpointcare.com; danderson@

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

Save

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

o   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.

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b. Task

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

- o **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.
- o **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.
- o **An Internet** task designates that the Participant will log onto the TouchPoint Care secure web site and answer the Question Series online.
- o **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.
- o **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.
  - o 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.

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

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

    - ▪ 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.

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o 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.

- 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.

- 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.

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

o 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.

  - 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.

  - 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.

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

- 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 though October 1, etc.
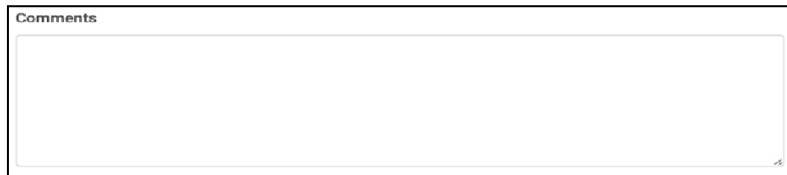
d. Call Agent Greeting

- 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".
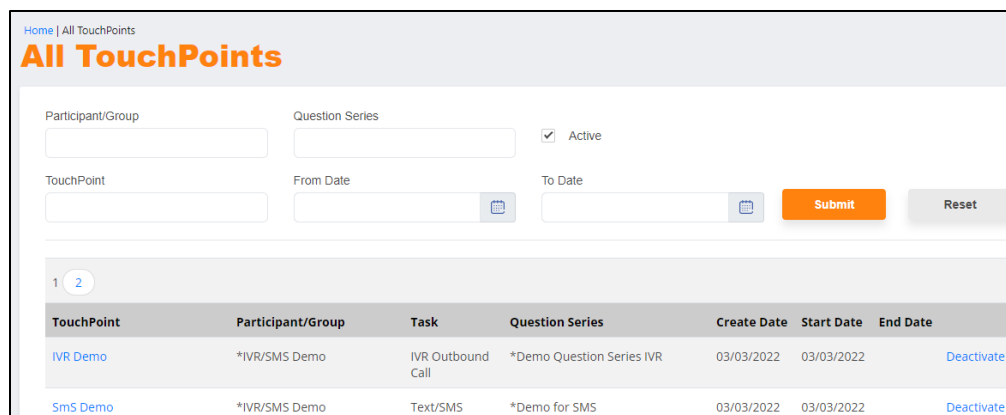
8. Manage TouchPoints – Review TouchPoints

- 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.

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.
  - o Use the tabs at the bottom of the TouchPoint Rule screen to make your edits.

  - o Click on the Update button to save the changes.

9. Manage Company

- On the menu, select Company > Edit Company Profile. Select Provider Name and the "Details" section will appear.
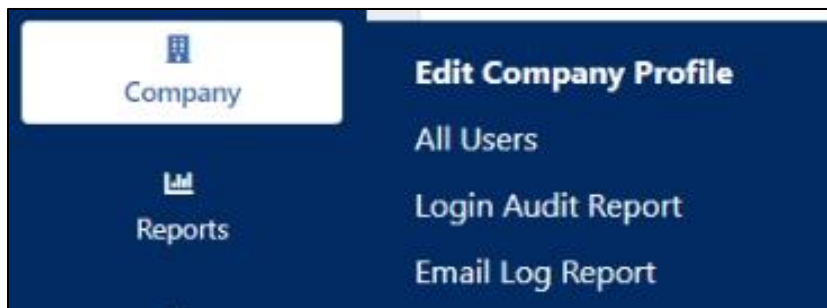
a. Details Section

- 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.

- o Name – This is the number for the Provider Name.
- o Admin – This is the Provider's personal contact.
- o 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".
- o Phone – This is the Provider's personal contact.
- o 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.

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- Setting Sub-Section
  - o Click on the plus (+) sign next to the "Settings" header and that area will appear.

    - ▪ 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 curser over the blue question mark circle.
    - ▪ Show Custom Data on Alert Emails?
- Activations & Welcome Message Sub-Section

  - o 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

o 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.
  o Remember to click on the "Save" button.
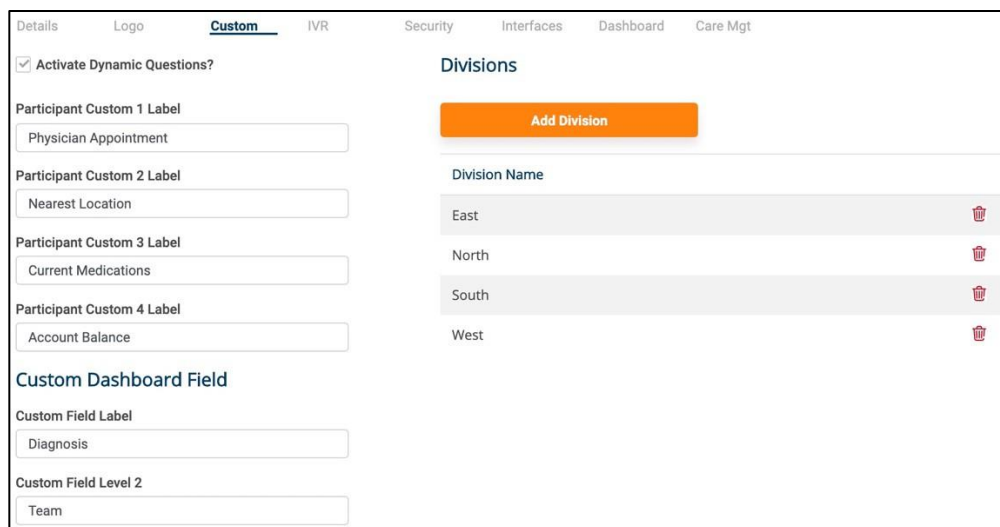
d. IVR (Interactive Voice Response) Section

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

e. Security Section

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

f. Interfaces Section
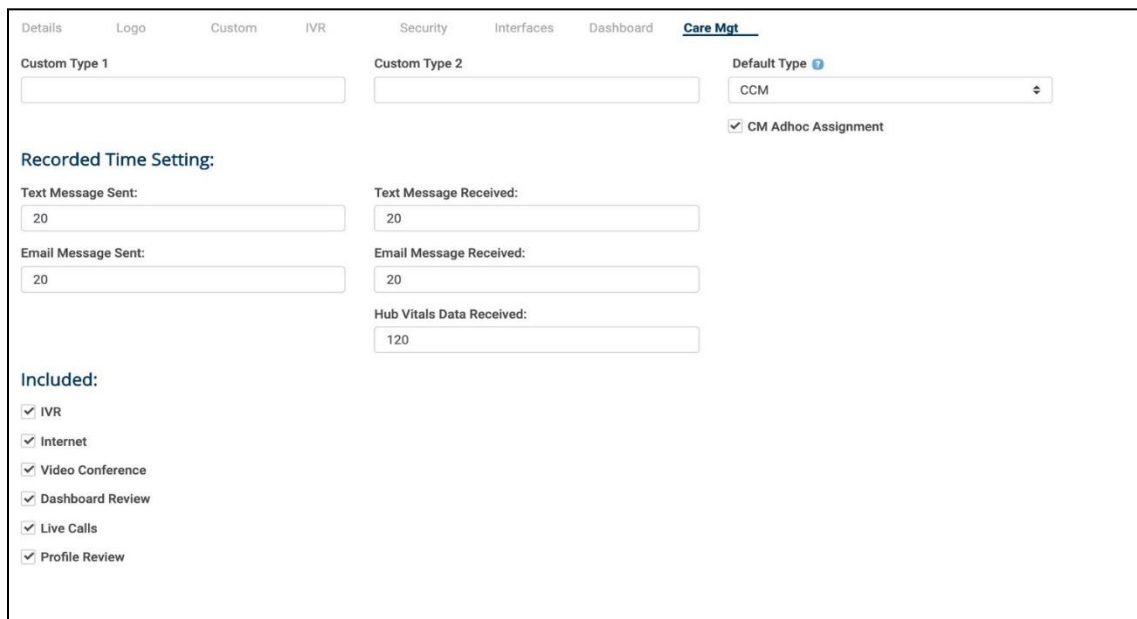
o Remember to click on the "Save" button.

g. Dashboard Section

- The Dashboard section is for choosing what you see in the Clinical Management Dashboard – Communication Center.

  o Filter – Check boxes of what you want. Click on up/down arrows to see choices of each.

  o Data Columns

  o Medications – Click box if you want medications displayed.

    ▪ Remember to click on the "Save" button.

h. Care Mgt Section

o Remember to click on the "Save" button.

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:
    o 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.

  o 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.

  o Remember to click on the "Create Rule" button.

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:

- System Default Rules:
  o 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.
  o The system also inactivates the Participant and suspends any remaining scheduled calls.
  o 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:
  o 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.

o 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".

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
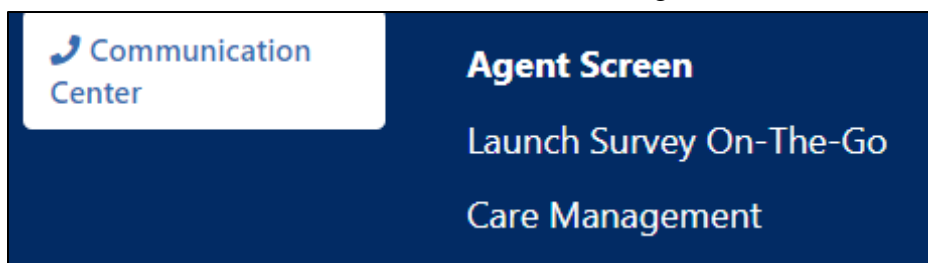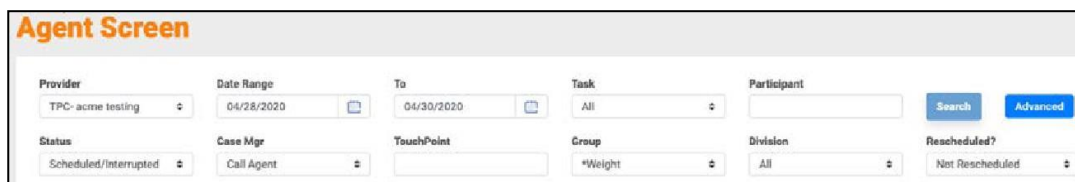
- When a TouchPoint is created and saved, the TouchPoint Care system creates a schedule for each contact and displays that schedule on the Agent screen. Each "Scheduled" call is designated with a green dot. The information is presented in chronological order, by date and then by the contact Start time 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.

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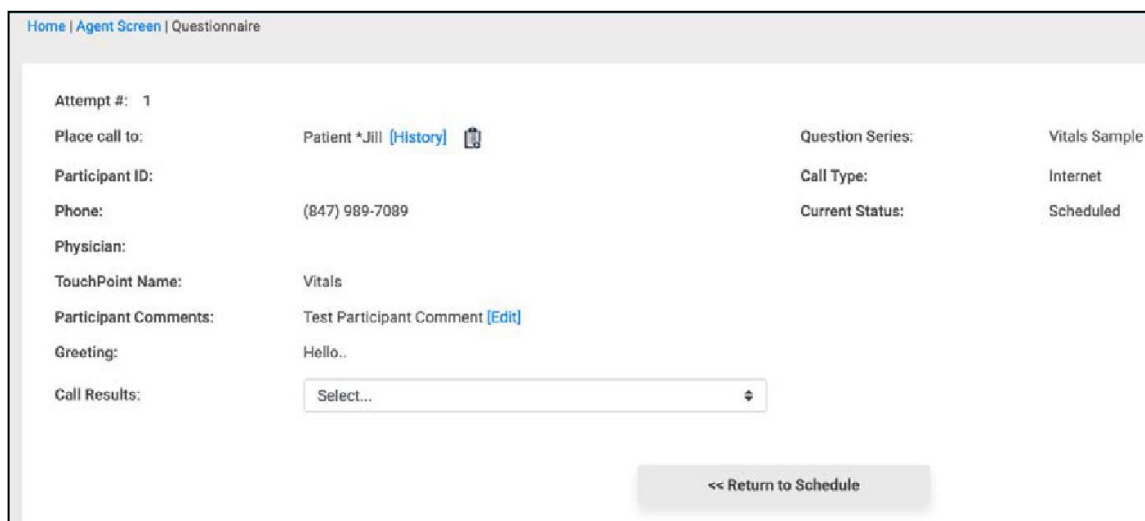
o Upon making the various filter choices and clicking on the Search button, the system will display all of the scheduled contact information that meets the filter requirements.
  - When done, click on the "Search" button.

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.

o 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 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:

  o Sending an e-mail to the system administrator notifying them of the call result for that Participant Alert ID.

  o 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:

  o 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:
  - o 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.
  - o 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:
  - o 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.
  - o 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".
  - o **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.

  - o Editing Responses:

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

o 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.

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

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.
  - o   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.
  - o   If the IVR Status has: "Processed" then the IVR portion has finished.
  - o   If the Call Status has: "Completed" then all the questions have been answered and the call is complete.
  - o   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
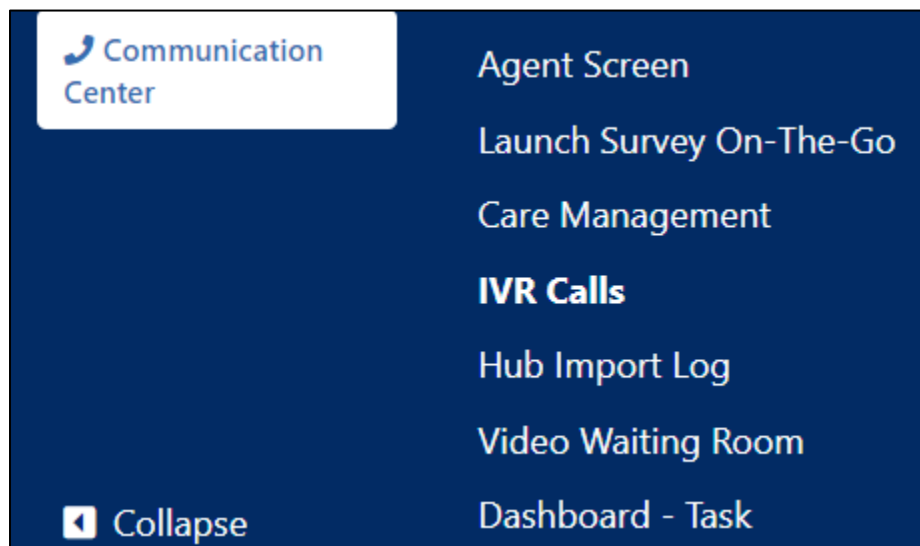
vii.   Record Level Locking

- TouchPoint Care has implemented SQL Server record level locking on the Agent Screen.
  - o   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.	Case 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

12. Frequently Asked Questions

- **How can I send a participant a LINK of a Survey?**

  o 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)

  o 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?**

  o 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?**

  o Go to Communication Center> Care Management > Select Date Range > Export > CM CPT Report

  o On Care Management Page, click names of Participants to view individual time instances.

- **The difference between the Question library and series?**

  o 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?**

  o 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?**

  o 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.

  o 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?**

  o 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?**

  o 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?**

  o After selecting any Series under Question tab > All Questions, click Set/Edit Alerts.
  o On this page, you can manage questions
  o that send Participants to a new Group and
  o choose multiple emails for receiving alerts.
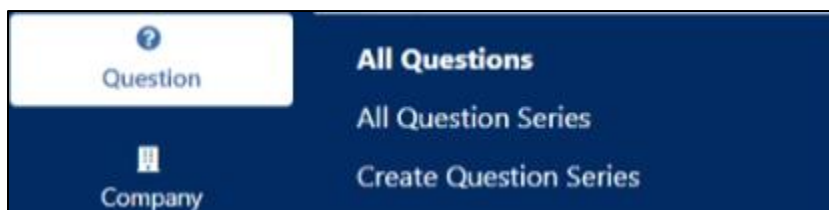
- **How do I create a working Reminder for an event or video chat?**

  o 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.

o 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.**

  o 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**

  o 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?**

  o 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.