

**PRO Insight
Smart Measurement[®] System
User Guide**

January 2023

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CHAPTER 1 ABOUT PRO INSIGHT

Amplifying the patient's voice in health care, QualityMetric's Smart Measurement[®] System *Patient-Reported Outcomes – Insight* (PRO Insight) provides a standardized and scientifically valid way to measure the health status and health outcomes of individuals and populations. Designed specifically for our SF Health Surveys (SF-12v2[®] and SF-36v2[®] Health Surveys), this robust data system is designed to capture data and deliver critical analytics quickly and efficiently.

PRO Insight is a convenient, all-in-one, web-based health survey data collection service available for all health care markets. Using the latest technologies to capture, benchmark, and interpret survey data, PRO Insight captures vital patient-centered information about functioning and well-being to facilitate dialog between physicians and patients and document the effectiveness of intervention programs.

MEASURING HEALTH ACROSS INDIVIDUALS OR GROUPS

PRO Insight helps individual clinicians or organizations better understand how patients view their own health, and how they feel and function in their daily lives. Risk stratification algorithms paired with flexible reporting capability identify members with unmet needs, helping providers prioritize their intervention plans.

PRO Insight features:

- Flexible data collection planning tools
- Automatic scoring of surveys with real-time reports at the individual and group level
- Standard surveys can be customized with additional questions
- Reporting that tracks trends in scores over time and compares programs, patients and populations
- Alert system to notify providers when a patient's scores reach a known critical range
- Automated patient reminder system to maximize compliance
- Administration management tools for sponsors, groups, sites, and individuals
- Multi-user capability that allows multiple patients/clinicians to be logged into the system and completing tasks simultaneously
- System is secure to FDA 21 CFR part 11 and HIPAA

Because PRO Insight is used by both Healthcare Professionals and Members, this user guide has specific Chapters focused on how each group will use it.

Chapter 2 Data Collection information.

Chapter 3 Details the functions used by Healthcare Professionals such as: Providers, Administrators and other Health Care Professionals.

Chapter 4 Details the functions used by Member such as: Individuals, Members, Patients and Subjects.

Chapter 5 Implementation Suggestions for Health Care Professionals.

Index Index for quick search on topics.

CHAPTER 2 DATA COLLECTION

PRO Insight is part of QualityMetric's comprehensive data management solution utilizing cloud-based technology to help reduce cost and to allow for greater flexibility. Whether you want a turn key solution using an SF survey that members access directly from the amihealthy.com website or set up customized surveys to capture your data, PRO Insight can help.

PRO Insight offers various modes of survey administration:

- **Web Forms** Discussed in this user guide, web form delivery is survey administration through data entry into the amihealthy.com website.
- **Web Services** Companies can set up web service calls from their systems to PRO Insight to scores the surveys, stores the member and survey data in PRO Insight and return the scores and benchmark interpretations back to their systems.
- **Trusted Partner** Transparent user authentication and survey administration into PRO Insight.

The PRO Insight Professional Trusted Partner Logon connection allows professionals to login to PRO Insight from their own system. The company sets up a connection to PRO Insight that is managed remotely from a calling website. This connection is authorized by the use of a security token that is generated outside of the professional's web browser session. The token is to be passed back to the calling website and then put in the response to a request made to the PRO Insight system.

Discuss your company's needs with your QualityMetric Account Executive to determine which mode of delivery is best for you.

The QualityMetric SF™ Health Surveys capture practical, reliable and valid information about functional health and well-being from the patient's point of view. They can be used across age, disease and treatment group, and are appropriate for a wide variety of applications.

SURVEY NAMES (AS DISPLAYED IN PRO INSIGHT)

Survey Names (as displayed in PRO Insight)
SF-6Dv2
SF-6Dv2 Health Survey
SF-6Dv2 Health Survey Acute Version
SF-6Dv2 Single Item Forms
SF-6Dv2 Health Survey
SF-6Dv2 Health Survey Acute Version
SF-8
SF-8™ Health Survey
SF-10
SF-10™ Health Survey for Children
SF-10™ Health Survey for Children (Spanish)
SF-12v2
SF-12v2® Health Survey
SF-12v2® Health Survey Acute Version
SF-12v2® Health Survey (HTML report)
SF-12v2® Health Survey (Spanish)
SF-12v2® Health Survey (Advanced Reporting)
SF-12v2® Health Survey (Basic Reporting)
SF-12v2® Health Survey MH Enhanced with ME (Standard Reporting)
SF-12v2® Health Survey MH Enhanced with ME (Advanced Reporting)
SF-12v2® Health Survey MH Enhanced
SF-12v2® Health Survey MH and SET Enhanced
SF-12v2® Health Survey MH Enhanced (Spanish)

Survey Names (as displayed in PRO Insight)
SF-12v2® Health Survey with PIQ-6
SF-12v2® Health Survey MH Enhanced with PHQ-9
SF-12v2® Health Survey with PHQ-9
SF-12v2 Single Item Forms
SF-12v2® Health Survey
SF-12v2® Health Survey - SET
SF-12v2® Health Survey - MH Enhanced
SF-12v2® Health Survey - MH and SET
SF-12v2® Health Survey w/ PIQ-6
VR-12
SF-12v2® Cross Calibrated Scores
SF-36v2
SF-36v2® Health Survey Standard Version
SF-36v2® Health Survey Acute
SF-36v2® (Provider report only - No Member report)
SF-36v2® Acute (Provider report only - No Member report)
SF-36v2® Health Survey: United States (Spanish)
SF-36v2® Health Survey Standard Version (German)
SF-36v2® Health Survey Standard Version (Advanced Reporting)
SF-36v2® Health Survey Standard Version (Basic Reporting)
SF-36v2® Health Survey MH Enhanced with ME (Basic Reporting)
SF-36v2® Health Survey MH Enhanced with ME (Advanced Reporting)
SF-36v2® Health Survey with PIQ-6™ (English)
SF-36v2® Health Survey: United Kingdom (English)

Survey Names (as displayed in PRO Insight)
SF-36v2® Australia (English)
SF-36v2® Health Survey: Denmark (Danish)
SF-36v2 Single Item Forms
SF-36v2® Health Survey Standard Version
SF-36v2® Health Survey Standard Version: Canada (English)
SF-36v2® Health Survey Standard Version: United Kingdom (English)
SF-36v2® Health Survey Standard Version: United States (Spanish)
SF-36v2® Health Survey with PIQ-6™
VR-36
SF-36v2® Cross Calibrated Scores
Asthma Control Test
Asthma Control Test
ACT™ (Spanish)
Asthma Impact Survey
Asthma Impact Survey (AIS6) (English)
Brief Fatigue Inventory
Brief Fatigue Inventory (BFI)
CHAI
Consumer Health Activation Index™ (CHAI™)
CHI
Consumer Health Inventory™ (CHI™)
Headache Impact Survey
HIT-6
MOS Sleep

Survey Names (as displayed in PRO Insight)
MOS 6-Item Sleep-Revised 2010: United States (English) ¹
MOS 12-Item Sleep-Revised 2010: United States (English) ²
Patient Health Questionnaire
PHQ-9 ³
Pain Impact Questionnaire
PIQ-6™ Pain Impact Questionnaire
Rhinitis Impact Survey
RIS-6™

MOBILE FRIENDLY SURVEYS

The Standard Recall SF-12v2® and SF-36v2® surveys are available in mobile friendly a single-item layout. These Single Item Form (SIF) handheld versions of our SF surveys were developed by our Science team.

CONFIGURING ADDITIONAL QUESTIONS ON SURVEYS

A feature available for purchase on most PRO Surveys is the ability to supplement the surveys with additional questions. Configuring additional questions is discussed in the Tools section of this user guide. To purchase Configuring Additional Questions, please contact your QualityMetric Account Executive.

¹ Copyright, 1986, RAND. MOS 6-Item Sleep Scale – Revised 2010

² Copyright, 1986, RAND. MOS 12-Item Sleep Scale – Revised 2010

³ PHQ-9 Copyright © Pfizer Inc. All rights reserved. Reproduced with permission.

CUSTOM SURVEYS

PRO Insight can also be used for data capture on custom surveys. The QualityMetric team can work with you to build surveys to your specification and preference.

To learn more about our surveys, technology solutions and science support services, please contact us at <https://www.qualitymetric.com>.

LICENSING PRO INSIGHT

To license PRO Insight for an upcoming study/program, please contact your QualityMetric Account Executive. If you don't have an Account Executive, please contact us at <https://www.qualitymetric.com>

BENCHMARKS

A feature available for purchase on the standard recall SF-12v2® Health Survey, standard recall SF-36v2® Health Survey and is benchmark interpretations. In addition to scoring surveys and comparing the results to the General Population, PRO Insight allows you to compare scores against condition specific and regional insurance populations. This feature is also available for the SF-12v2 Cross Calibrated Scores and SF-36v2 Cross Calibrated Scores. To purchase Benchmarks, please contact your QualityMetric Account Executive (or use the links above).

PURCHASING SURVEYS AND SURVEY CREDITS

To purchase additional surveys or survey credits, please contact your QualityMetric Account Executive (or use the links above).

GETTING STARTED

Upon licensing PRO Insight for collection of QualityMetric's survey tools, an email will automatically be sent to the primary licensing contact with his or her login and initial password. This user is then responsible for creating other professional user accounts (including users of the same access level), establishing sites, and assigning surveys to sites. Such actions and more are discussed later on in this document.

CHAPTER 3 PRO INSIGHT FOR HEALTHCARE PROFESSIONALS

PROFESSIONAL ACCOUNTS

Professional accounts are created during a registration process, whereby a login name and password are established for the professional. Each professional account has an assigned Level of Access that determines which tasks he/she has authorization to perform.

PROFESSIONAL LEVELS OF ACCESS

PRO Insight includes secure access for all healthcare professionals assigned to the group account. When the initial survey purchase is made, the group account and a group administrator(s) is established.

Other professional accounts with differing levels of access can be established as desired and administered by the group administrator.

Optional data management features are available to the professional to ensure greater data control and security.

PROFESSIONAL LEVEL OF ACCESS DESCRIPTIONS

Group Administrator

The highest level of access is the Group Administrator. Group Administrators are responsible for managing all Members, Sites, and other Professional users.

Site Administrator

The Site Administrator has a level of access allowing management of sites, Members accounts, professional accounts, and data. The Group Administrator assigns the Site Administrator level of access to a professional account.

Full Access Professional

The Full Access Professional has a level of access allowing management of Member accounts and data. The Full Access Professional also has access to various reports.

Data Entry Professional

The Data Entry Professional has a level of access allowing management of Member accounts and data.

PROFESSIONAL LEVEL OF ACCESS PRIVILEGES

	Group Administrator	Site Administrator	Full Access Professional	Data Entry Professional
Log-in to the PRO Insight at www.amihealthy.com	✓	✓	✓	✓
Advanced Reporting: PRO Analytics	✓	✓	✓	
Register new members	✓	✓	✓	✓
Assign Members to Sites	✓	✓	✓	✓
Modify members' information (name, phone, email, address, etc.)	✓	✓	✓	✓
Configure additional survey questions	✓			
Enter survey data	✓	✓	✓	✓
Edit survey data	✓	✓	✓	
View Member and Provider reports	✓	✓	✓	✓
Modify survey data	✓	✓	✓	
View Tabled Reports of survey data	✓	✓	✓	
Modify status (active/inactive) for members	✓	✓	✓	
Register new professionals	✓	✓		
Modify status (active/inactive) for professionals and sites	✓	✓		
Modify other professionals' records	✓	✓		
Assign Professionals to Sites	✓	✓		
Delete surveys	✓	✓		
Delete members	✓	✓		

	Group Administrator	Site Administrator	Full Access Professional	Data Entry Professional
Manage <i>all</i> sites and professionals within a Group	✓			
View data at <i>all</i> sites within a Group	✓			
Create new sites within a Group	✓			

PROFESSIONALS LOGIN

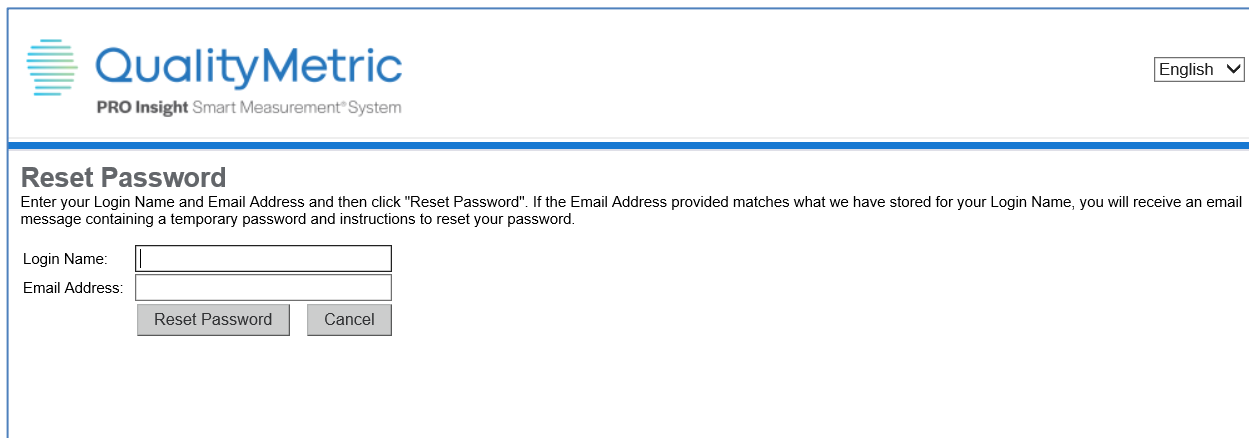
The first step in accessing the PRO Insight is logging in.

1. Go to www.amlhealthy.com
2. Under the “Providers, Administrators and other Health Care Professionals” portal, login using the professional login name and password established during account registration and click on the Login button.

FORGOT PASSWORD?

Forgot Password: If you have forgotten your password, click on the “[Forgot Password?](#)” link. The Reset Password screen appears.

You will be required to enter your Login Name and Email. If the Email Address provided matches what is stored for your Login Name, you will receive an email message containing a temporary password and instructions to reset your password.

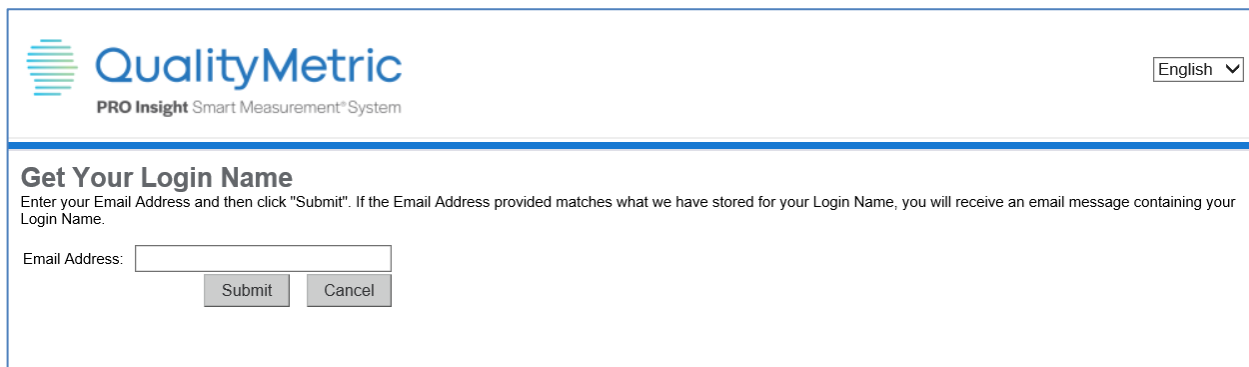


The screenshot shows the 'Reset Password' form in the QualityMetric PRO Insight system. At the top left is the QualityMetric logo with the tagline 'PRO Insight Smart Measurement System'. At the top right is a language dropdown menu set to 'English'. The main heading is 'Reset Password'. Below the heading is a paragraph of instructions: 'Enter your Login Name and Email Address and then click "Reset Password". If the Email Address provided matches what we have stored for your Login Name, you will receive an email message containing a temporary password and instructions to reset your password.' The form contains two input fields: 'Login Name:' and 'Email Address:'. Below these fields are two buttons: 'Reset Password' and 'Cancel'.

FORGOT LOGIN NAME?

Forgot Login Name: If you have forgotten your Login Name, click on the “[Forgot Login Name?](#)” link. The Get Your Login Name appears.

You will be required to enter your email. If the Email Address provided matches what we have stored for your Login Name, you will receive an email message containing your Login Name.

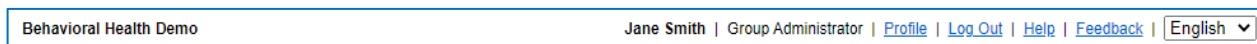


The screenshot shows the 'Get Your Login Name' form in the QualityMetric PRO Insight system. At the top left is the QualityMetric logo with the tagline 'PRO Insight Smart Measurement System'. At the top right is a language dropdown menu set to 'English'. The main heading is 'Get Your Login Name'. Below the heading is a paragraph of instructions: 'Enter your Email Address and then click "Submit". If the Email Address provided matches what we have stored for your Login Name, you will receive an email message containing your Login Name.' The form contains one input field: 'Email Address:'. Below this field are two buttons: 'Submit' and 'Cancel'.

After logging in the Home tab will display on the screen.

TOP OF THE SCREEN

At the very top of the screen there are a few items displayed. Top left will show the name of your project. The next two items are your name and your role in PRO Insight. The next three items are links to your [Profile](#) page for updating your profile information, [Log Out](#) to exit the application, [Help](#) which will open this User Guide and [Feedback](#) which will allow you to provide comments to QualityMetric. Lastly, you can use the dropdown to select English or Spanish as the language for the screens. Note: Some features are only available on English screens.



NAVIGATION TABS FOR HEALTHCARE PROFESSIONALS

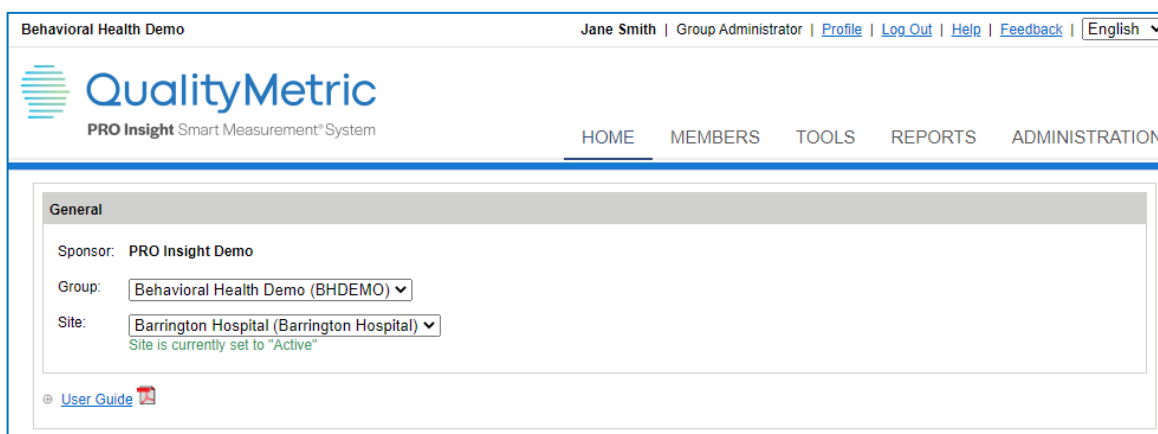
The navigation tabs are located at the top right section of the screens. For healthcare professionals, the tabs are: Home, Members, Tools, Reports, and Administration. If you click on the Home tab, from any other screen, PRO Insight will take you back to the Home screen.

Here is a quick overview of the tabs followed by further drill into their associated key functions.

HOME

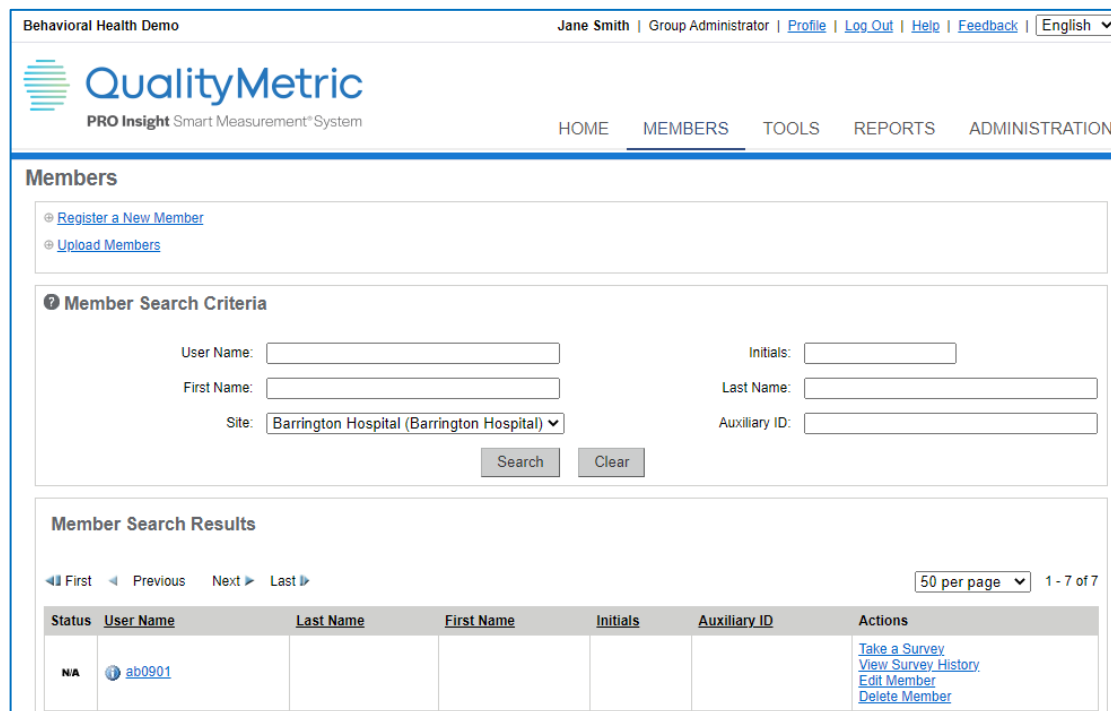
The professional's Home screen will appear upon successful login. This screen provides general information about your professional account and enables the user to see various groups or sites (dependent upon their access levels).

The Home screen is the first navigation tab for PRO Insight.



MEMBERS

Clicking on the Members tab will allow the professional to perform data entry for an existing Member, add a new Member(s), or review all Members in a group, depending on the Professional's level of access.



Behavioral Health Demo Jane Smith | Group Administrator | [Profile](#) | [Log Out](#) | [Help](#) | [Feedback](#) | English

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HOME MEMBERS TOOLS REPORTS ADMINISTRATION

Members

[Register a New Member](#)
[Upload Members](#)

Member Search Criteria

User Name: Initials:
 First Name: Last Name:
 Site: Auxiliary ID:

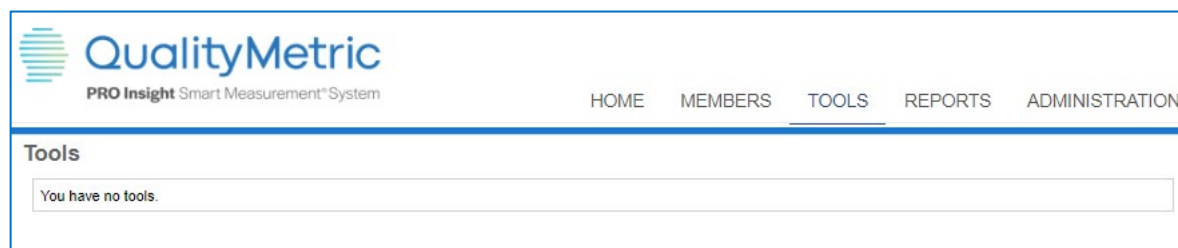
Member Search Results

◀ First ◀ Previous Next ▶ Last ▶ 1 - 7 of 7

Status	User Name	Last Name	First Name	Initials	Auxiliary ID	Actions
NA	ab0901					Take a Survey View Survey History Edit Member Delete Member

TOOLS

The Tools tab will display for certain levels of access. The typical group set up shows “You have no tools.”



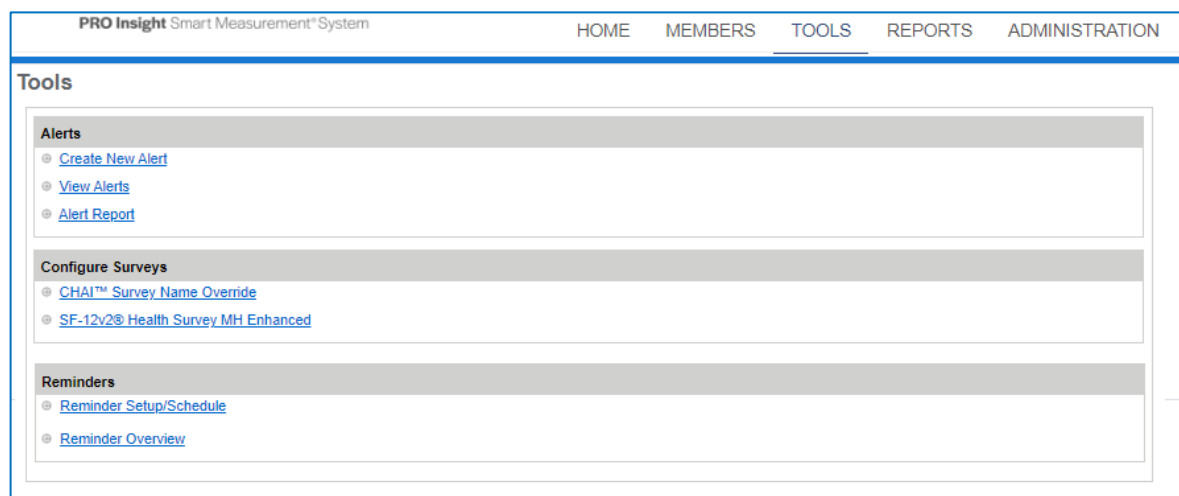
QualityMetric
PRO Insight Smart Measurement® System

HOME MEMBERS TOOLS REPORTS ADMINISTRATION

Tools

You have no tools.

Some groups choose to purchase additional features such as Schedules and Reminders, Alerts or Configure survey. For those groups, the additional features display on the Tools tab. Step by step instructions for use of these features are embedded in the links to those features.

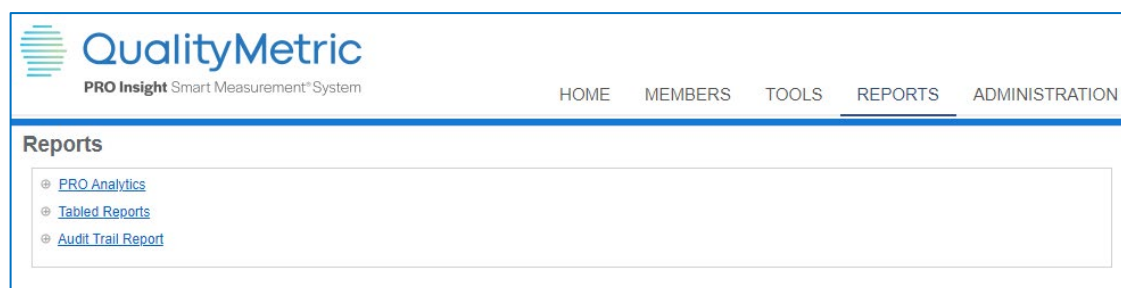


The screenshot shows the 'Tools' section of the PRO Insight Smart Measurement System. The navigation bar includes 'HOME', 'MEMBERS', 'TOOLS' (which is underlined), 'REPORTS', and 'ADMINISTRATION'. The 'Tools' section is divided into three categories:

- Alerts:**
 - [Create New Alert](#)
 - [View Alerts](#)
 - [Alert Report](#)
- Configure Surveys:**
 - [CHAI™ Survey Name Override](#)
 - [SF-12v2® Health Survey MH Enhanced](#)
- Reminders:**
 - [Reminder Setup/Schedule](#)
 - [Reminder Overview](#)

REPORTS

The Reports tab allows you to analyze data and run Group and Site level reports. Further discussion on Reports later in the guide.

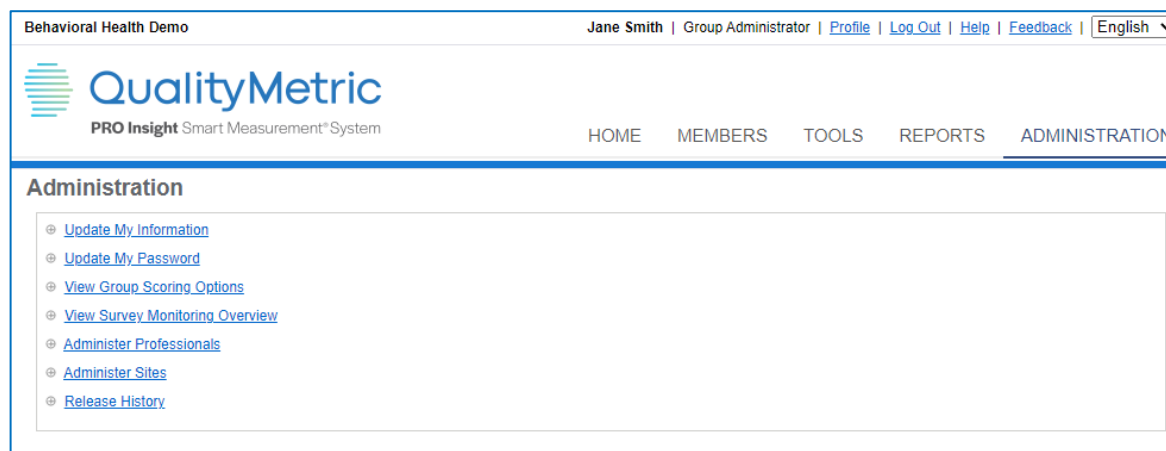


The screenshot shows the 'Reports' section of the PRO Insight Smart Measurement System. The navigation bar includes 'HOME', 'MEMBERS', 'TOOLS', 'REPORTS' (which is underlined), and 'ADMINISTRATION'. The 'Reports' section contains the following links:

- [PRO Analytics](#)
- [Tabled Reports](#)
- [Audit Trail Report](#)

ADMINISTRATION

The Administration tab shows the Administration Management functions. The features available are dependent on your level of access. In the screenshot here, the user is a Group Administrator.



The screenshot shows the 'Administration' section of the PRO Insight Smart Measurement System. The navigation bar includes 'HOME', 'MEMBERS', 'TOOLS', 'REPORTS', and 'ADMINISTRATION' (which is underlined). The user is identified as 'Jane Smith | Group Administrator'. The 'Administration' section contains the following links:

- [Update My Information](#)
- [Update My Password](#)
- [View Group Scoring Options](#)
- [View Survey Monitoring Overview](#)
- [Administer Professionals](#)
- [Administer Sites](#)
- [Release History](#)

ADMINISTRATION MANAGEMENT FUNCTIONS

Administrative functions are available by clicking the Administration tab at the top of the screen. The screens are easy to use.

UPDATE MY INFORMATION

Professionals can click on this link to update their PRO Insight Information. Only a few fields are required and noted with a red *. You cannot change your Level of Access, Sponsor, Group, or Active State fields. These fields can only be changed by someone with higher level access.

PRO Insight Smart Measurement System

HOME MEMBERS TOOLS REPORTS ADMINISTRATION

Update My Information

*User Name:

First Name:

Middle Name:

*Last Name:

*Email:

Phone:

Address 1:

Address 2:

City:

State:

Zip/Postal Code:

Country:

Level of Access:

Sponsor:

Group:

Active State:

PRO Analytics Access Only:

*Field is required.

UPDATE MY PASSWORD

You can update your password from the update my password screen. (next page).

PRO Insight Smart Measurement™ System HOME MEMBERS TOOLS REPORTS ADMINISTRATION

Update Professional Password

In order to keep each account secure and also due to health care related regulations, we have strengthened our password requirements. The minimum requirements for a strong password are as follows:

- Passwords are case-sensitive
- Password must be a minimum of 8 characters and a maximum of 15 characters
- Password must contain at least one lower-case letter (a-z)
- Password must contain at least one upper-case letter (A-Z)
- Password must contain at least one numeric character (0-9)
- Password must not contain any blank spaces
- Password cannot contain your username
- Password cannot be one of the last 10 passwords used

User Name: jsmithug

*Current Password:

*New Password:

*Confirm New Password:

VIEW SURVEY MONITORING OVERVIEW

Certain levels of access can view the Survey Monitoring Overview screen which shows the information about the surveys in the Group.

- The View Purchase History link will show all the the Survey, delivery Mode, Survey Credits purchased, the Date of Purchase and Additional Notes from the set up.

Survey Monitoring Overview

[View Purchase History](#)

Group: Behavioral Health Demo (BHDEMO)

Survey Licensed	Mode of Administration	Total Surveys Purchased	Surveys Remaining	Date of Most Recent Survey	Date of Last Purchase	Actions
Consumer Health Activation Index™ (CHAI™)	Web	10000	9990	09/14/2018	09/25/2017	Purchase History
SF-12v2® Health Survey MH Enhanced	Web	20000	19436	05/14/2019	09/19/2017	Purchase History
SF-12v2® Health Survey: United States (Spanish)	Web	10000	9994	08/11/2020	08/05/2020	Purchase History

VIEW GROUP SCORING OPTIONS

Certain levels of access can view the Group Scoring Options screen. It shows the set up options available for the SF- surveys. For information regarding additional scoring options or available upgrades, please contact your Account Executive.

View Scoring Options

Group: Behavioral Health Demo (BHDEMO)
 * The options apply to ALL sites under the group.

Missing Scale Estimation (MSE):

SF-8	None
SF-12v2	Maximum Data Recovery
SF-36v2	None
MOS 6-Item Sleep Scale – Revised 2010	None
MOS 12-Item Sleep Scale – Revised 2010	None
SF-12v2 Cross Calibrated Scores - VR	None
SF-36v2 Cross Calibrated Scores - VR	None

Scoring:

Utility Index	Not Purchased
Allow Skipped Responses (for Surveys that do not have MSE)	Yes
SF-8 Norms	QualityMetric 2000 General Population Sample for the SF-8
SF-12 Norms	QualityMetric 2009 General Population Sample
SF-36 Norms	QualityMetric 2009 General Population Sample

Features:

Alerts	No
Survey Response Editing	Yes
Configure Survey Questions	Yes
PRO Analytics	No
Allscripts	No
Detect Survey Edits (Webservice / Imports)	Yes
Reminders	No
SDTM	No
0 to 100 Scores	No

Timepoints:

Survey	Timepoints	Used By
SF-6Dv2 Health Survey Acute Version	Baseline 3 Months 6 Months 12 Months	All Sites

ADMINISTER PROFESSIONALS

Register a New Professional

Group Administrators and Site Administrators can register new professionals. Required fields are noted with a * in red.

1. Select the Administer Professional link.
2. Enter the Professional’s registration information and click Register.

Register a New Professional

*User Name:

*Password:

*Confirm Password:

First Name:

Middle Name:

*Last Name:

*Email:

Phone:

Address 1:

Address 2:

City:

State:

Zip/Postal Code:

Country:

Level of Access:

Sponsor:

Group:

Active State:

*Field is required.

3. Once the Register button is clicked, the Professional Site Associates screen will display showing all Sites available. This screen will show for all professionals except those with Group Administration Level of Access.
4. Highlight the Site(s) and click the Add button in the center. When finished, click Done.

Professional Site Associations

Professional: Lori Plant (LPlant)

<p>Associated With: Behavioral Health Site (BHSITE)</p>	<p>Not Associated With: Lincoln Clinic (Lincoln)</p>
--	---

Edit Professional

Once a Professional is created, Group Administrators and Site Administrators can edit the professional's record.

Administer Professionals

[Register New Professional](#)

Status	User Name	First Name	Last Name	Level of Access	Actions
Active	JConley	Janet	Conley	Group Administrator	Edit Professional Update Password Site Associations
Active	LPlant	Lori	Plant	Data Entry	Edit Professional Update Password Site Associations

The three Actions available to change are Edit Professional, Update Password, and Site Associations.

Actions

[Edit Professional](#)
[Update Password](#)
[Site Associations](#)

ADMINISTERING SITES

Register New Site

1. From the Administration tab, click Administer Sites.
2. Click the link for "Register New Site".

Administer Sites

[Register New Site](#)

Group: Behavioral Health Demo (BHDEMO) ▼

Status	Site Login	Site Description	Actions
Active	Barrington Hospital	Barrington Hospital	Edit Site Site Surveys Professional Associations

3. Enter the data regarding the new Site, when complete, click "Register".

Register a New Site

*Site Name:

*Description:

Phone:

Fax:

Address 1:

Address 2:

City:

State/Province:

Zip/Postal Code:

Country:

Active State:

Sponsor:

Group:

*Field is required.

Update Existing Site

Once a Site is created, Group Administrators can edit the Site.

Status	Site Login	Site Description	Actions
Active	Barrington Hospital	Barrington Hospital	Edit Site Site Surveys Professional Associations
Active	BHSITE	Behavioral Health Site	Edit Site Site Surveys Professional Associations
Active	Lincoln	Lincoln Clinic	Edit Site Site Surveys Professional Associations

The three Actions available to change are Edit Site information, select specific Surveys (from the surveys available for the Group) for a Site, select specific Professionals to associate with a Site.

Actions

[Edit Site](#)

[Site Surveys](#)

[Professional Associations](#)

RELEASE HISTORY

Release History

To view the latest updates to PRO Insight, click Release History.



PRO Insight Release History

PRO Insight 3.3

Date Released: 01-DEC-2021

Updates included in this release:

- SF-6Dv2 Health Survey (Standard and Acute Recall)
- SF-6Dv2 Health Survey Single Item Form (Standard and Acute Recall)
- Integrate SF-6Dv2 Scoring for the SF-36v2 Health Survey (Standard and Acute Recall)
- Scoring completed with country specific weights (United Kingdom, Australia, and China)

PRO Insight 3.2

Date Released: 14-SEP-2021

Updates included in this release:

- SDTM (Study Data Tabulation Model) Setting/Data Mapping Utility
- Import/Export formatted files

MEMBER ADMINISTRATION

REGISTERING A NEW MEMBER

1. Click the “Members” tab at the top of the Home page.
2. Click on the “Register a New Member” link

Members

[Register a New Member](#)
[Upload Members](#)

Member Search Criteria

User Name: Initials:
 First Name: Last Name:
 Site: Auxiliary ID:

Member Search Results

First Previous Next Last
50 per page
1 - 1 of 1

Status	User Name	Last Name	First Name	Initials	Auxiliary ID	Actions
NA	AB1230	Barry	Annie			Take a Survey View Survey History Edit Member Delete Member

3. Complete the registration form.

Register a New Member X

* Field is required.

* User Name

* Password

* Reenter Password

First Name

Last Name

Initials

Gender

Male Female

Date of Birth

--Month--

--Day--

--Year--

† If E-mail address is not specified, you will not be able to reset your password if lost or forgotten.

† Email

† Confirm Email

Home Phone

Work/Alternate Phone

Call Phone

Address 1

Address 2

City

State

Zip/Postal Code

Country

- SELECT COUNTRY -

Keyword

Assign to Site

Behavioral Health Site (BHSITE)

Active State

Active

Auxiliary ID

Submit Cancel

- Note:** If there is more than one Site for the Group, make sure you select the correct Site for the new member. Screenshot on next page.
- Once the registration is complete, click Submit.

If there is more than one Site for the Group, use the dropdown to select the correct Site for the new member.

Assign to Site

Behavioral Health Site (BHSITE) ▼

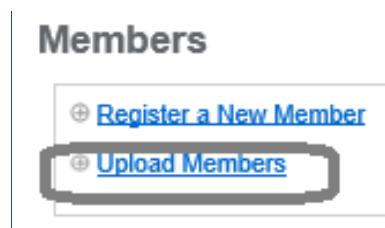
Active State


Active ▼

Auxiliary ID

MEMBER UPLOAD/IMPORT


Some professionals may have access to upload Members into PRO Insight. This feature is helpful when a Group Administrator would like to register many Members at one time. This will appear as an “Upload Members” link in the Members tab.



For detailed instructions on importing members, click on the  icon on the Member Upload screen.

Member Upload

[Return to Member Search](#)


 Member Upload

Site: ▼

File (.csv):

Max Size (2,000 KB)
Max Members (500)

FINDING AND ADMINISTERING MEMBERS

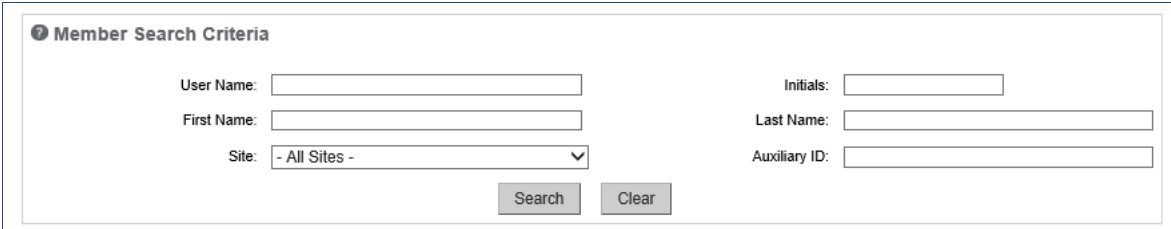
After you have successfully logged into PRO Insight amlhealthy.com you can access the member information from the Members Tab. Click the “Members” tab at the top of the page and designate your search criteria. The help key  can assist in defining your search fields as indicated below.

Member Search Criteria

Use this Search Engine to search for amlhealthy.com members associated with your site(s). Narrow your search criteria by filtering your search results. Optional filters define the following fields:

- **User Name:** the user name entered during member registration
- **Initials:** the initials entered during member registration
- **Last Name:** the last name entered during member registration
- **First Name:** the first name entered during member registration
- **Site:** a drop-down list of the sites associated with the professional account defining the search criteria
- **Auxiliary ID:** an auxiliary identifier that may be entered during member registration. This is an optional field.

Please note: If you do not specify any search criteria, your search results will return **all** members associated with the selected site(s).



Member Search Criteria

User Name:

Initials:

First Name:

Last Name:

Site:

Auxiliary ID:

Member Search Results Pane

- **Page navigation:** Use the First, Previous, Next and Last buttons above the pages to navigate through the results
- **Sorting:** Click on the Column Heading to Sort the Data in the Grid. The data will be sorted by a single column only. Clicking on the same column heading in successive times toggles the sort order between ascending and descending.
- **Records per page:** Select the number of records per page to display: 25, 50 or 100.
- **Page display:** Display the current page and total number of pages
- **Member summary:** Displays a screen with more details about the member

Member Search Results
Page navigation

Records per page: 50 per page | Records displayed: 1 - 50 of 423

Click to sort by column

Status	User Name	Last Name	First Name	Initials	Auxiliary ID	Actions
NA	07182017_JAB	Biron	Janet	JAB		Take a Survey View Survey History Edit Member Delete Member
<i>Member summary</i>						
NA	AdamGreene	Greene	Adam			Take a Survey View Survey History Edit Member Delete Member

Member Summary

Clicking on the Information Icon (i) next to each User Name will display a window with more detailed Member Information.

Member Summary [X]

User Name: AdamGreene
 First Name: Adam
 Last Name: Greene
 Initials:
 Date of Birth: 06/10/1959
 Email Address: agreene@qualitymetric.com
 Active State: Active
 Auxiliary ID:

Site Information

Associated with the following sites:

- Behavioral Health Site (BHSITE)

UPDATING MEMBER INFORMATION

First locate the member by using the Member Lookup.

1. From the Member Search Results Pane, click on the “Edit Member” link.

Member Search Results

Records per page: 50 per page | Records displayed: 1 - 50 of 423

Status	User Name	Last Name	First Name	Initials	Auxiliary ID	Actions
NA	07182017_JAB	Biron	Janet	JAB		Take a Survey View Survey History Edit Member Delete Member
NA	AdamGreene	Greene	Adam			Take a Survey View Survey History Edit Member Delete Member

2. The Edit Member Information Screen will appear

3. Click on “Update Member’s Information” to update General Information, “Update Member’s Password” to update the Member’s Password or “Add/Remove Sites” to modify a Members’ Site assignments.

DELETING A MEMBER

Professionals with the pre-requisite level of access will have the option to Delete Members. The member record will be permanently deleted. Deleting a member requires a reason and comment to be entered. This will be saved in the Audit Trail.

1. From the Member Search Results Pane, click on the “Delete Member” link.

Status	User Name	Last Name	First Name	Initials	Auxiliary ID	Actions
N/A	07182017_JAB	Biron	Janet	JAB		Take a Survey View Survey History Edit Member Delete Member
N/A	AdamGreene	Greene	Adam			Take a Survey View Survey History Edit Member Delete Member

2. The Delete Member screen will appear. When deleting a member, the professional is required to enter a Reason and Comment as to why the member is being deleted.

ADMINISTERING SURVEYS

Professionals can take surveys by proxy once Members have been established.

TO ADMINISTER A SURVEY

1. From the Member Search Results Pane, click on the “Take a Survey” link.

Status	User Name	Last Name	First Name	Initials	Auxiliary ID	Actions
N/A	07182017_JAB	Biron	Janet	JAB		Take a Survey View Survey History Edit Member Delete Member
N/A	AdamGreene	Greene	Adam			Take a Survey View Survey History Edit Member Delete Member

2. The Member Surveys screen will appear. Locate the survey you wish to administer and click on the Survey Name to start the survey.

Member Surveys X

User Name: AdamGreene Name: Adam Greene

For Site: Behavioral Health Site (BHSITE)

[SF-12v2@ Health Survey MH Enhanced](#)
 Last Taken - 5/17/2018 (961 Days)
 ⊕ [Most Recent Member Report](#)
 ⊕ [Most Recent Provider Report](#)

[SF-12v2@ Health Survey: United States \(Spanish\)](#)
 Never Taken For Site Behavioral Health Site

Note: For the SF-12v2 Cross Calibrated Score and the SF-36v2 Cross Calibrated Score, “Take a Survey” will show the Most recent Member Report and Most Recent Provider Report.

3. The Member Surveys screen will appear. Locate the survey you wish to administer and click on the Survey Name to start the survey.



SF-12v2® Health Survey MH Enhanced

This survey asks for your views about your health. This information will help you keep track of how you feel and how well you are able to do your usual activities. *Thank you for completing this survey!*

For each of the following questions, please click the circle that best describes your answer.

Survey Date:

Timepoint

1) In general, would you say your health is:

Excellent	Very good	Good	Fair	Poor
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2) The following questions are about activities you might do during a typical day. Does your health now limit you in these activities? If so, how much?

	Yes, limited a lot	Yes, limited a little	No, not limited at all
a. <u>Moderate activities</u> , such as moving a table, pushing a vacuum cleaner, bowling, or playing golf	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Climbing <u>several</u> flights of stairs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3) During the past 4 weeks, how much of the time have you had any of the following problems with your work or other regular daily activities as a result of your physical health?

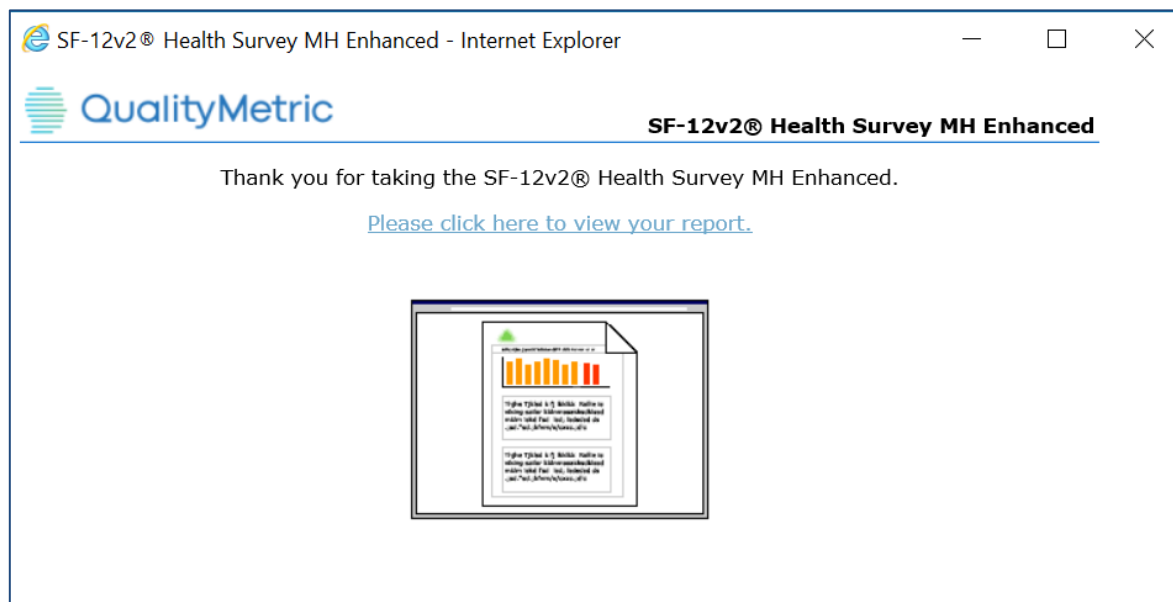
	All of the time	Most of the time	Some of the time	A little of the time	None of the time
a. <u>Accomplished less</u> than you would like	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Were limited in the <u>kind</u> of work or other activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Clear

Next

SF-12v2® Health Survey – MH Enhanced © 1994, 2002, 2008 QualityMetric Incorporated. All rights reserved.
SF-12® is a registered trademark of Medical Outcomes Trust.
United States (English) Standard

4. Upon survey completion, the data will enter the database. Then, you will be prompted with the link to [Please click here to view your report.](#)



VIEW SURVEY HISTORY FOR A MEMBER

Professionals can review all completed surveys for a member.

1. To access the Survey History, select “View Survey History” from the Member Search Results Pane.

Member Search Results

◀ First ◀ Previous [Next](#) ▶ [Last](#) ▶

50 per page ▾ 1 - 50 of 423

Status	User Name	Last Name	First Name	Initials	Auxiliary ID	Actions
N/A	07182017_JAB	Biron	Janet	JAB		Take a Survey View Survey History Edit Member Delete Member
N/A	AdamGreene	Greene	Adam			Take a Survey View Survey History Edit Member Delete Member

Member Survey Search Criteria Pane

Use this Search Engine to search for completed surveys for a member. Narrow your search criteria by filtering your search results. Optional filters define the following fields:

- **Start Date:** the Survey Administration starting date to search on
- **End Date:** the Survey Administration ending date to search on
- **Site:** a drop-down list of Sites that the Member belongs to AND the professional has access to
- **Survey:** a drop-down list of Surveys for the Sites that the Member belongs to

Member Survey History

[Return to Member Search](#)

Member Information

User Name: AdamGreene	Name: Adam Greene	Initials:
Gender: Male	Date of Birth: 06/10/1959	

Survey Search Criteria

Start Date: <input type="text" value="01/01/2001"/>	End Date: <input type="text" value="01/02/2021"/>
Site: <input type="text" value="Behavioral Health Site (BHSITE)"/>	
Survey: <input type="text" value="- All Available Surveys -"/>	
<input type="button" value="Submit"/>	

Survey Results Pane

The following data is contained in the survey results columns.

- **Alert** (if purchased) This column provides a visual indication if the survey session generated an alert. Clicking the icon will display the Alert Summary.

- **Info Icon** The Info Icon will open the Survey Summary Pop-up.

- **Survey** Name of Survey. The survey name will be a link and clicking on the Link will open the Survey Summary pop-up.

- **Survey Date** The date that the survey was administered.

- **Timepoint** Timepoint or Visit indicator, if used

- **Actions** Links to:
 - View Member Report
 - View Provider Report
 - Edit Survey
 - Delete Survey

Survey Results				
Alert	Survey	Survey Date	Timepoint	Actions
	SF-12v2 Health Survey MH Enhanced	01/02/2021		View Member Report View Provider Report Edit Survey Delete Survey
	SF-12v2 Health Survey MH Enhanced	05/17/2018		View Member Report View Provider Report Edit Survey Delete Survey
	SF-12v2 Health Survey MH Enhanced	11/26/2015		View Member Report View Provider Report Edit Survey Delete Survey

3 Records

VIEW MEMBER AND PROVIDER REPORTS

Select the View Member Report or View Provider Report links to see a specific Member's Reports.

Survey Results				
Alert	Survey	Survey Date	Timepoint	Actions
	SF-12v2 Health Survey MH Enhanced	01/02/2021		View Member Report View Provider Report Edit Survey Delete Survey
				View Member Report

3 Records

MEMBER SURVEY REPORTS

Member reports are presented to the user upon completion of most surveys. Member reports for most surveys (including the SF Health Surveys) include the following sections:

- **Your Scores:** Provides the score(s) for the newly completed survey.
- **What Your Scores Mean:** Provides an interpretation of the score(s), usually relative to the general member population. The application can be configured to include additional benchmarks for comparison such as condition specific and regional insurance status.

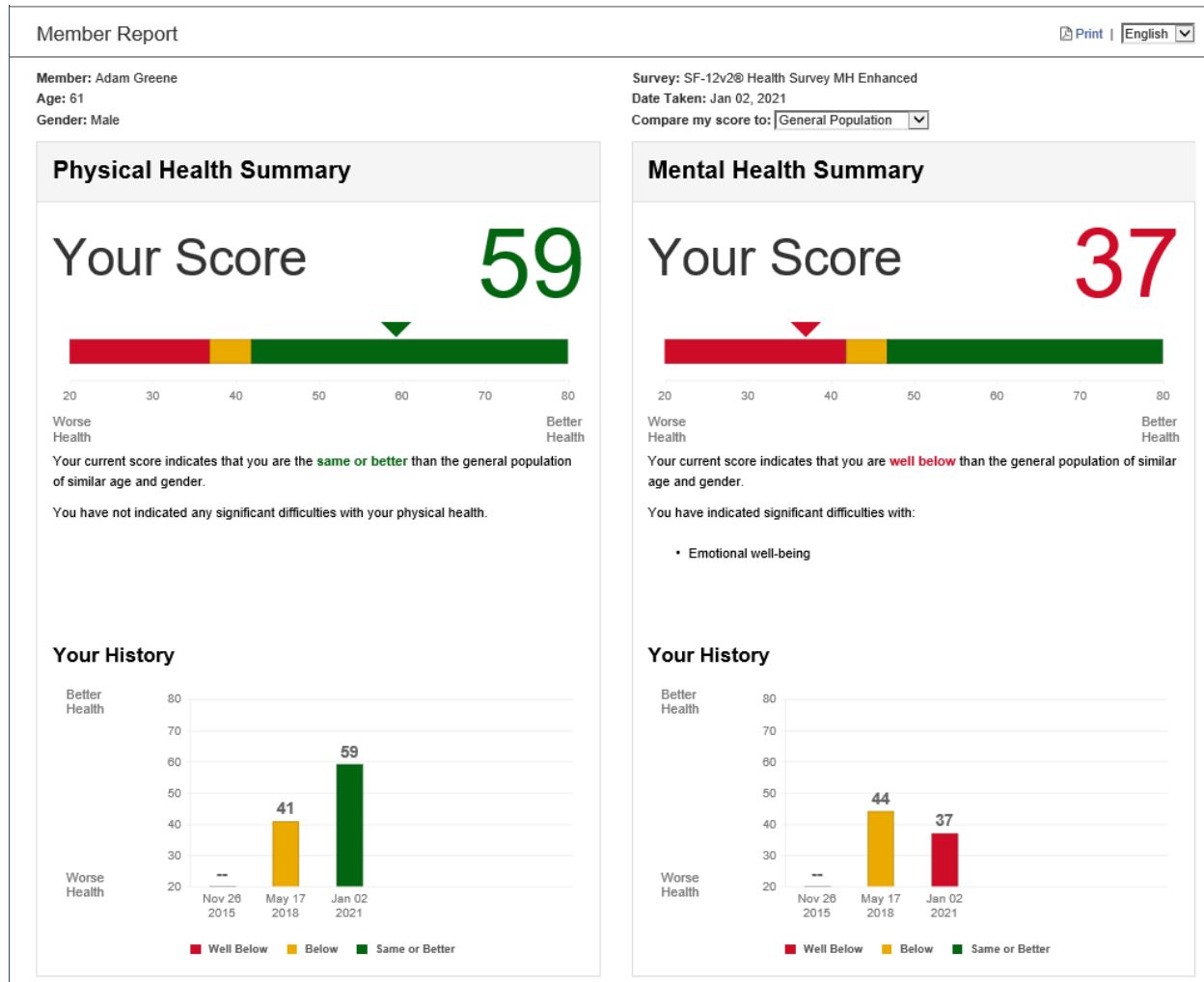
For the complete list of benchmarks available to purchase, contact your QualityMetric Account Executive.

- **Your History:** Provides the score and interpretation for the last six surveys to visually represent the member's progress over time.

- **Your Progress:** Provides a comparison for current vs previous and /or current vs baseline scores with a progress interpretation.

Other report formats are utilized for some surveys. An example of a Member Report is shown here and on the following pages.

SF-12v2 Health Survey MH Enhanced Member Report (sample)
Physical Health Summary and Mental Health Summary compared to the General Population



Continue on next page for Progress and Mental Health Impact.

Progress

Physical Health Progress				Mental Health Progress			
	Date	Score			Date	Score	
Current:	Jan 02, 2021	59	Your score is better than your previous survey	Current:	Jan 02, 2021	37	Your score is worse than your previous survey
Previous:	May 17, 2018	41		Previous:	May 17, 2018	44	
Current:	Jan 02, 2021	59	You are missing score(s) for comparison	Current:	Jan 02, 2021	37	You are missing score(s) for comparison
Baseline:	Nov 26, 2015	--		Baseline:	Nov 26, 2015	--	

Mental Health Impact

Your Score

17

0 10 20 30 40 50 60

Minimal Severe

Your score shows your mental health impact to be **mild**.

History

Date	Score
Nov 26 2015	10
May 17 2018	15
Jan 02 2021	17

Minimal Mild Moderate Severe

This survey is not a diagnostic tool. It is intended to supplement clinical decision making. If you have any questions or concerns, it is advised to seek professional medical consultation. Copyright © 1998-2021 QualityMetric, Inc.

PRO Insight allows you the ability to compare the member to the General Population or a benchmark. If you have purchased any benchmarks for the project, you can select to view the Member Report comparing the member’s score to the benchmark by selecting from the **Compare my score to:** dropdown.

Member Report Print | English

Member: Adam Greene
Age: 61
Gender: Male

Survey: SF-12v2® Health Survey MH Enhanced
Date Taken: Jan 02 2021
Compare my score to: General Population

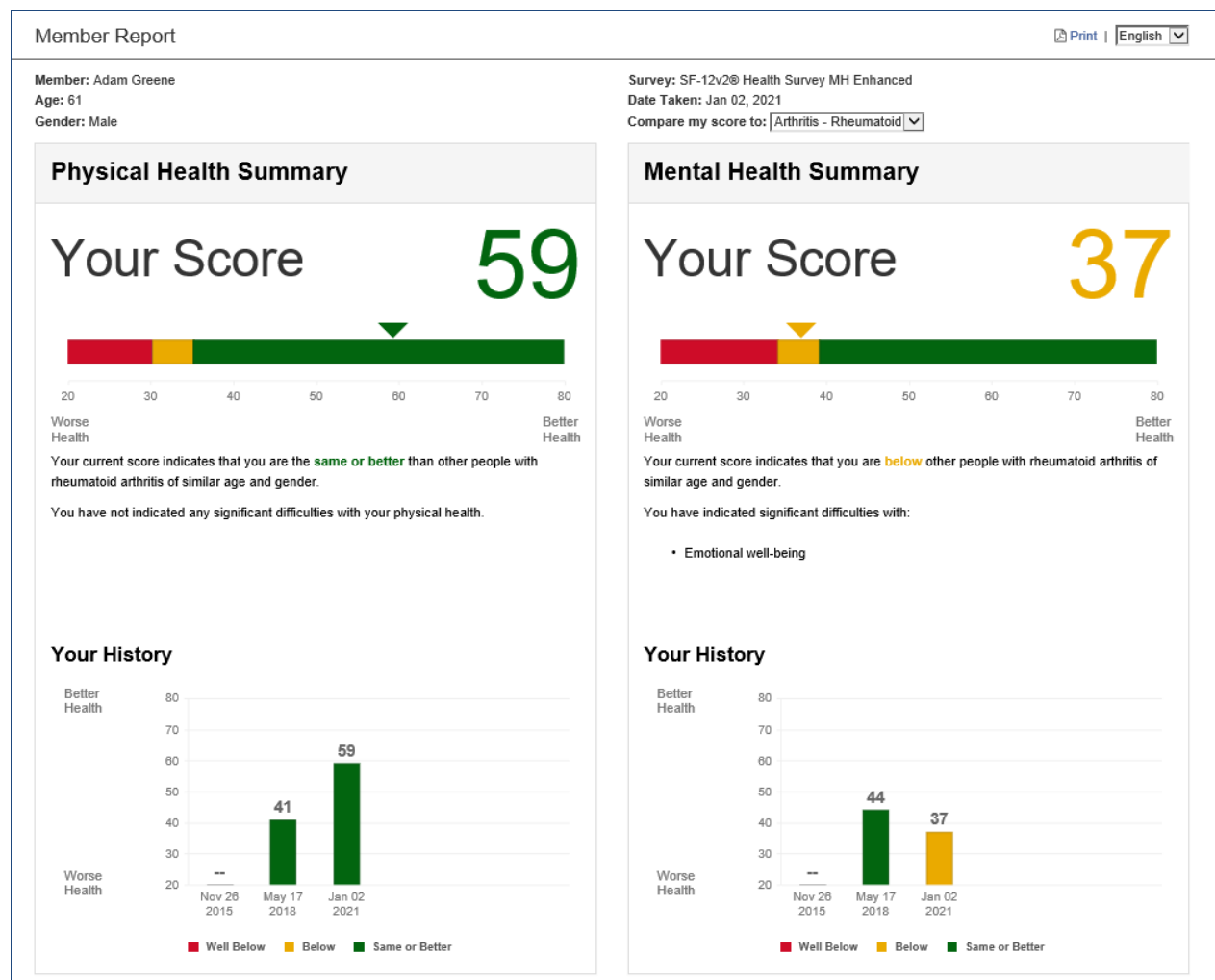
Physical Health Summary

Mental Health Summary

In the example on the next page, by comparing the member’s score to others in the Rheumatoid Arthritis population, the member’s **Physical Health Summary Health Summary** shows “Your current score indicates that you are the **same or better** than other people with rheumatoid arthritis of similar age and gender. You have not indicated any significant difficulties with your physical health.”

The members **Mental Health Summary Health Summary** shows “Your current score indicates that you are **below** other people with rheumatoid arthritis of similar age and gender. You have indicated significant difficulties with: Emotional well-being”.

Physical Health Summary and **Mental Health Summary** compared to the Arthritis – Rheumatoid Population.



The **Progress** and **Mental Health Impact** sections of the report are not linked to the benchmark and remain the same.

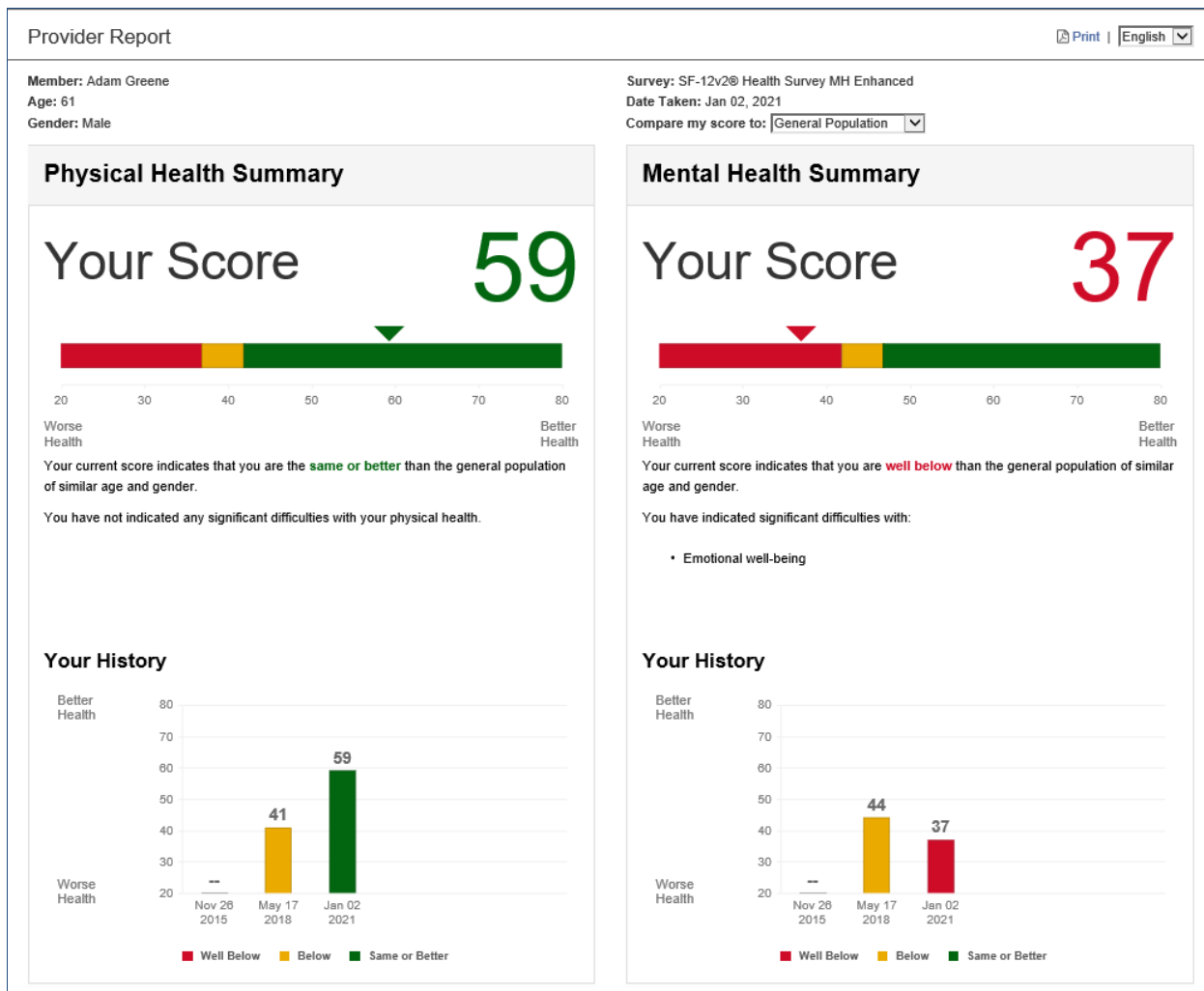
For the complete list of benchmarks available to purchase, contact your QualityMetric Account Executive.

PROVIDER SURVEY REPORTS

Provider reports are similar to Member reports in that they display the scores for the current survey administration and score trending over time. Provider reports also include the member survey responses with a red flag to indicate if a response requires action. In addition, Provider reports may also be configured to include more advanced member predicted medical expenditure calculations that are based upon a member/disease population. Provider Reports are available for Professional Accounts only.

SF-12v2 Health Survey MH Enhanced Provider Report (sample)

Physical Health Summary and Mental Health Summary compared to the General Population



Continue on next page for Progress and Survey Responses.

Progress

Physical Health Progress				Mental Health Progress			
	Date	Score			Date	Score	
Current:	Jan 02, 2021	59	Your score is better than your previous survey	Current:	Jan 02, 2021	37	Your score is worse than your previous survey
Previous:	May 17, 2018	41		Previous:	May 17, 2018	44	
Current:	Jan 02, 2021	59	You are missing score(s) for comparison	Current:	Jan 02, 2021	37	You are missing score(s) for comparison
Baseline:	Nov 26, 2015	--		Baseline:	Nov 26, 2015	--	

Survey Responses 🚩 Needs Attention

Physical Health	Previous	Current
Limited in activities, such as moving a table, pushing a vacuum cleaner, bowling, or playing golf	Yes, limited a little	No, not limited at all
Limited in climbing several flights of stairs	Yes, limited a little	No, not limited at all
Accomplished less than you would like	Some of the time	None of the time
Limited in the kind of work or other activities	Some of the time	None of the time
Extent pain interfered with normal work	🚩 Moderately	🚩 Moderately
Overall health: excellent, very good, good, fair, or poor	Good	Very good
Mental Health	Previous	Current
High level of energy	Some of the time	Most of the time
Health problems interfered with social activities	🚩 Most of the time	Some of the time
Accomplished less than you would like	Some of the time	Some of the time
Performed work or other activities less carefully than usual	Some of the time	Some of the time
Felt calm and peaceful	Most of the time	🚩 A little of the time
Felt downhearted and depressed	A little of the time	A little of the time

Followed by **Mental Health Impact** and **Survey Responses**.

Mental Health Impact

Your Score 17

Your score shows your mental health impact to be **mild**.

History

Date	Score
Nov 26 2015	10
May 17 2018	15
Jan 02 2021	17

Survey Responses 🚩 Needs Attention

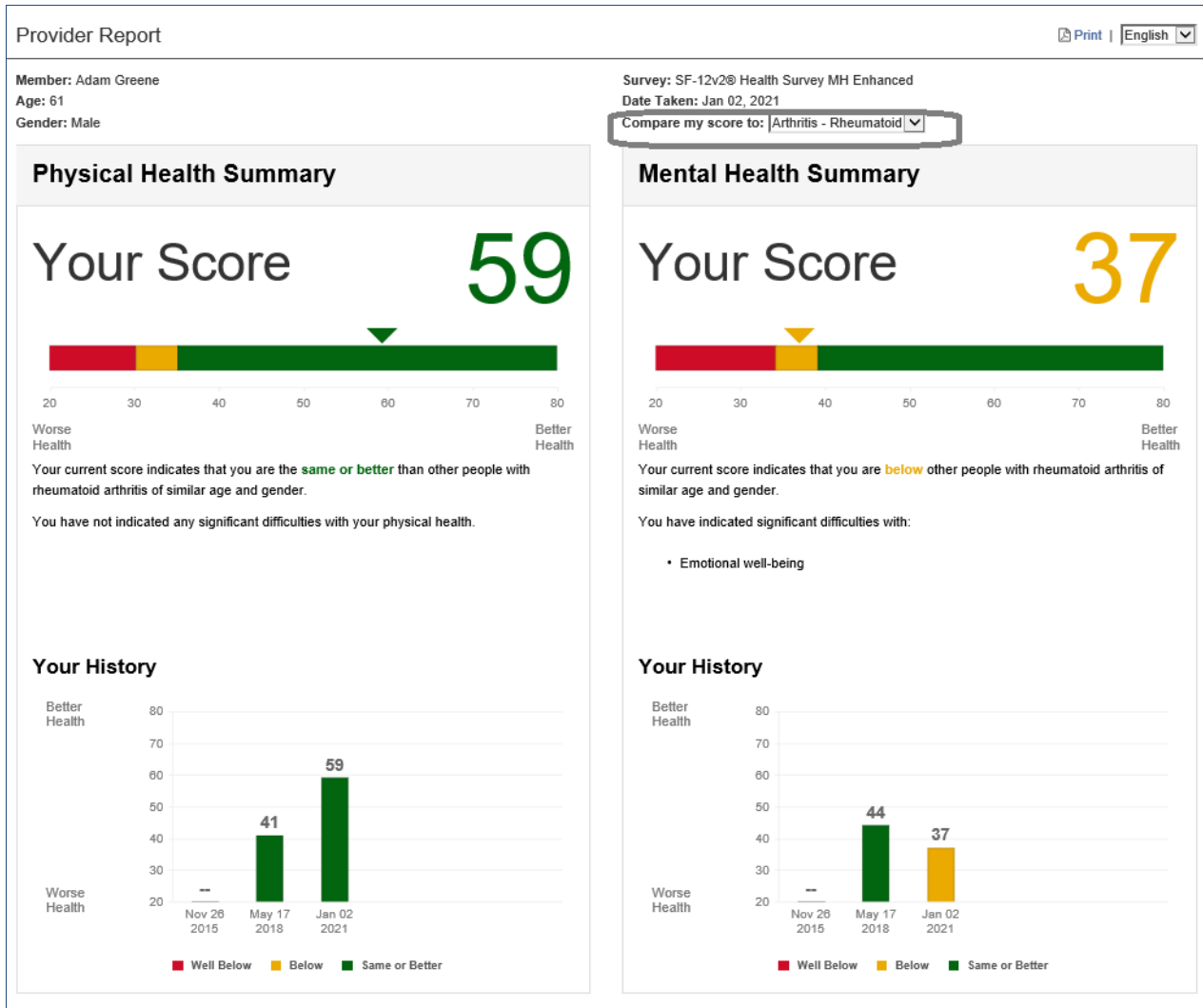
Mental Health Impact	Previous	Current
Felt very nervous	🚩 Most of the time	Some of the time
Felt down in the dumps	Some of the time	🚩 Most of the time
Felt calm and peaceful	Most of the time	🚩 A little of the time
Felt downhearted and depressed	A little of the time	A little of the time
Felt happy	🚩 A little of the time	Some of the time

This survey is not a diagnostic tool. It is intended to supplement clinical decision making. If you have any questions or concerns, it is advised to seek professional medical consultation. Copyright © 1998-2021 QualityMetric, Inc.

As with the Member Report, PRO Insight allows you the ability to compare the member to the general population or a benchmark. If you have purchased any benchmarks for

the project, you can select to view the Provider Report comparing the member's score to the benchmark by selecting from the **Compare my score to:** dropdown.


In this example, by comparing the member's score to others in the Rheumatoid Arthritis population, the member's **Physical Health Summary** and **Mental Health Summary** show

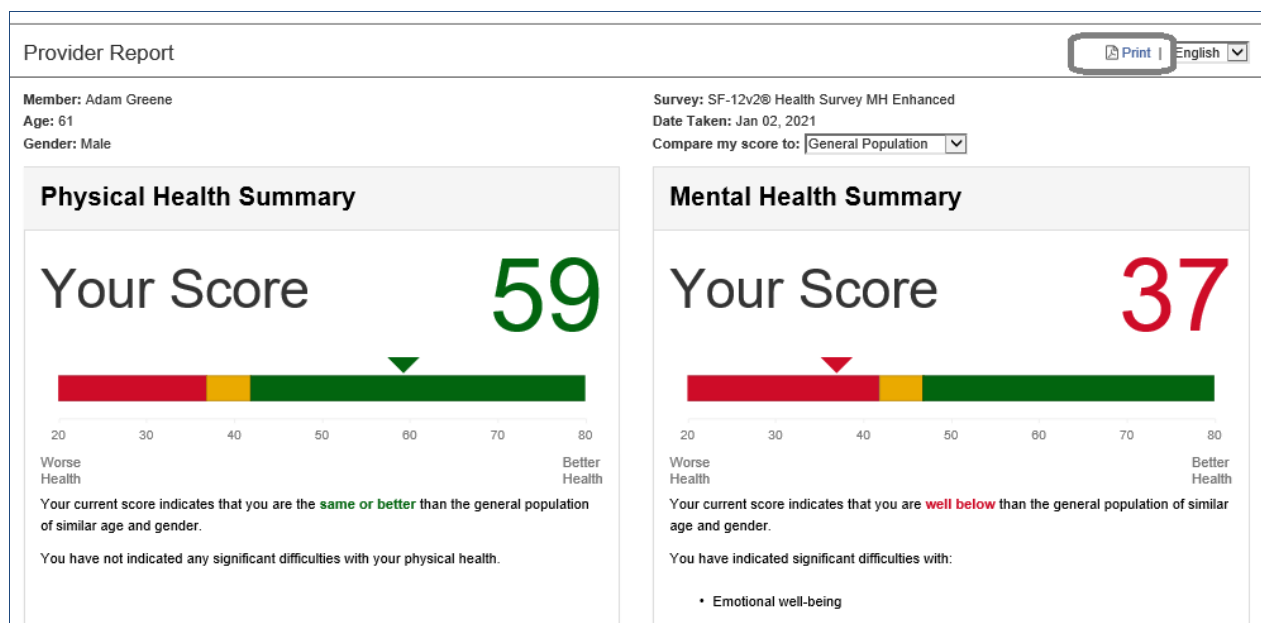


The **Progress** and **Mental Health Impact** sections of the report are not linked to the benchmark and remain the same.

For the complete list of benchmarks available to purchase, contact your QualityMetric Account Executive.

PRINTING A REPORT

1. When the report appears, click on the Print icon ( Print) in the upper right corner.



2. A window will open for you to save the .pdf report to your computer. **Note:** browsers display this .pdf window typically at the bottom of your screen.
 3. Open the report in Adobe Reader to print.
- * **Note:** Do not use the browser print option. The format of the report will not be readable.

EDITING A SURVEY

Professionals with the pre-requisite level of access will have the option to Edit Surveys.

Editing surveys requires a reason and comment to be entered. This will be saved in the Audit Trail.

- This feature must be configured in PRO Insight for use by your group. If you would like use of this feature, please contact your QualityMetric Account Executive
- Survey Date, Timepoint and Site can be edited for all surveys.
- Editing of Survey Responses is available on the SF-6Dv2 SF-8, SF-12v2, SF-36v2, CHAI and PHQ-9 surveys.

To Edit Survey Administration Details.

1. From the Member pane, select [View Survey History](#).
2. The Survey Results pane is displayed, locate the survey by Survey, Survey Date and Timepoint.
3. Click on the “Edit Survey” Link.

Survey Results				
Alert	Survey	Survey Date	Timepoint	Actions
	SF-12v2 Health Survey MH Enhanced	01/02/2021		View Member Report View Provider Report Edit Survey Delete Survey
	SF-12v2 Health Survey MH Enhanced	05/17/2018		View Member Report View Provider Report Edit Survey Delete Survey
	SF-12v2 Health Survey MH Enhanced	11/26/2015		View Member Report View Provider Report Edit Survey Delete Survey

3 Records

[Return to Member Search](#)

4. The Edit Survey Administration screen will appear. From this screen, you can edit the Survey Administration Details such as Timepoint, Survey Administration Date and Site. Enter the Reason and the comment for the Edit.

Edit Survey Administration X

User Name: AdamGreene
Name: Adam Greene

Survey Administration Details

Survey: SF-12v2 Health Survey MH Enhanced

Survey Date:

Timepoint:

Site:

Enter a reason and comment below

Reason:

Comment: (Max 500 characters)

5. Click on “Save and Close” to save the Survey Administration Details
6. Click on “Save and Edit Responses, to edit survey responses*. The survey will display for you to make an edit an answer(s). When finished, select Submit.
*This feature is available on the SF-6Dv2, SF-8, SF-12v2, SF-36v2, CHAI and PHQ-9 surveys.
7. Click on “Cancel” to leave the edit feature without any changes.

DELETING A SURVEY

Professionals with the pre-requisite level of access will have the option to delete surveys. The survey record will be permanently deleted. Deleting a survey requires a reason and comment to be entered. This information will be saved in the audit trail.

1. Select “Delete Survey” from the Actions Column in the Survey Results.

Survey Results				
Alert	Survey	Survey Date	Timepoint	Actions
	SF-12v2 Health Survey MH Enhanced	01/02/2021		View Member Report View Provider Report Edit Survey Delete Survey

3 Records

2. The Delete Survey screen will appear. When deleting a survey, the professional is required to enter a Reason and Comment as to why the survey is being deleted.

Delete Survey X

User Name: AdamGreene
 Name: Adam Greene
 Survey: SF-12v2® Health Survey MH Enhanced
 Survey Date: 1/2/2021

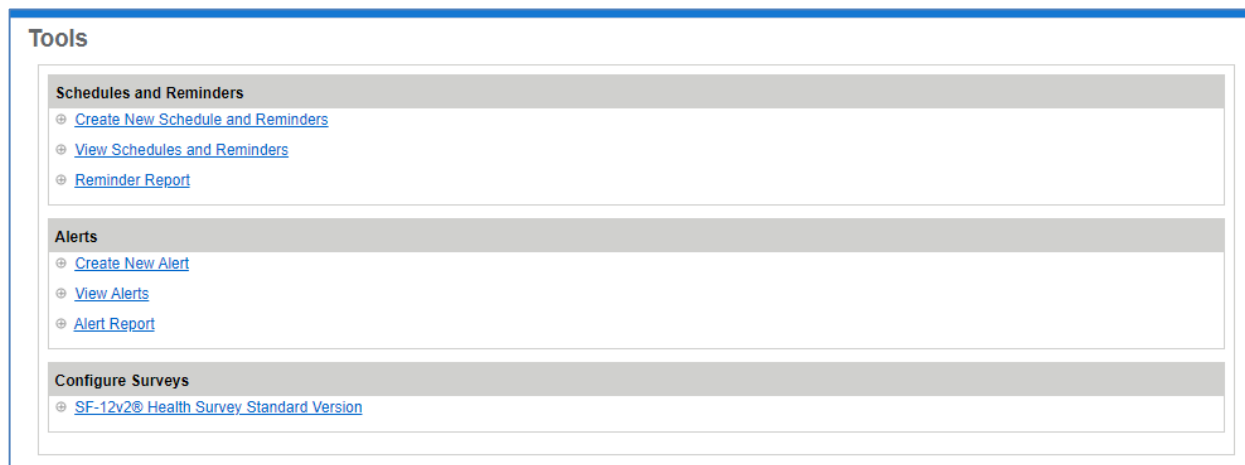
Enter a reason and comment below

Reason: --- Please Select ---

Comment: (Max 500 characters)

TOOLS

To access tools, click the “TOOLS” tab. Some groups choose to purchase additional features such as Configure Surveys, Schedules and Reminders or Alerts. For those groups, the additional features display on the Tools tab. Professionals with the pre-requisite level of access will be able to set up these features using Tools.



CONFIGURE SURVEYS

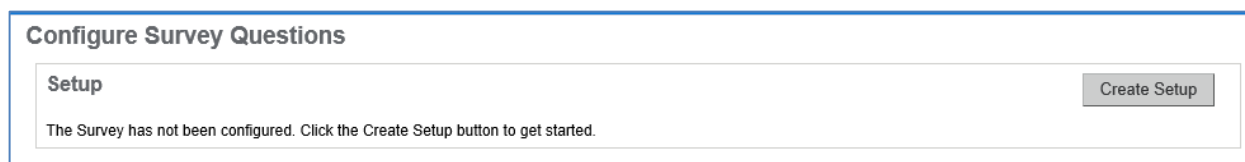
This feature allows a qualified user to add questions to surveys by augmenting most of our standard PRO instruments, using pre-defined question formats. If purchased, the Tools menu will display your purchased PRO surveys.



Surveys available for configuring questions include: SF-6Dv2™ Health Survey variations, SF-8™ Health Survey, SF-12v2 Health Survey variations, SF-36v2 Health Survey variations, Consumer Health Activation Index™ (CHAI™), and Patient Health Questionnaire (PHQ-9).

Configure Survey Questions

To configure questions on a PRO Survey, select the survey. The Configure Survey Questions screen appears. Select the “Create Setup” button.

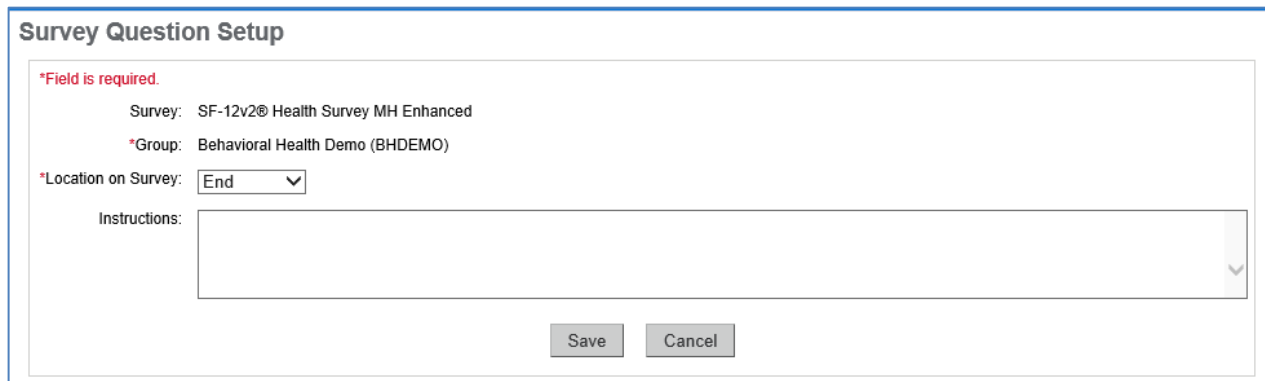


Survey Question Setup

Next, the Survey Question Setup screen shows:

- **Survey:** the Survey selected to add the questions.
- **Group:** the Group(s) associated with the survey. Select the Group to which you want to add the questions.
 - If there is more than one Group under the Sponsor, the checkbox “Include all Groups” will put the additional question(s) on the selected survey for all Groups when checked.
 - If there is more than one Group under the Sponsor and you want some of the Groups to have the additional questions, highlight those Groups using the Control key.
- **Location of Survey:** the dropdown defaults to “End” for the questions to be placed on a new screen located at the end of the survey. You may also select “Beginning” from the dropdown for the questions to be listed on a screen prior to the PRO Survey questions.
- **Instructions:** This is a free form text area for instructions. These instructions will display at the top of the additional questions screen.

Select the “Save” button when ready to configure the questions or “Cancel” button to leave the screen.



Survey Question Setup

*Field is required.

Survey: SF-12v2® Health Survey MH Enhanced

*Group: Behavioral Health Demo (BHDEMO)

*Location on Survey: End ▼

Instructions:

Save Cancel

The next screen shows what you selected on the Setup screen.

Configure Survey Questions

Setup Edit Setup

Survey: SF-12v2® Health Survey MH Enhanced

Location on Survey: End

Group: Behavioral Health Demo (BHDEMO)

Instructions:

Questions Preview Add Question

No Questions Found

To edit the setup, select the “Edit Setup” button. Select the “Add Question” button to begin configuring your question(s).

Add Question

*Field is required.

*Question Variable: ?

*Question Type: Textbox (Single Line) ▼

*Question Text:

Answer Required?:

*Question Status: Active ▼

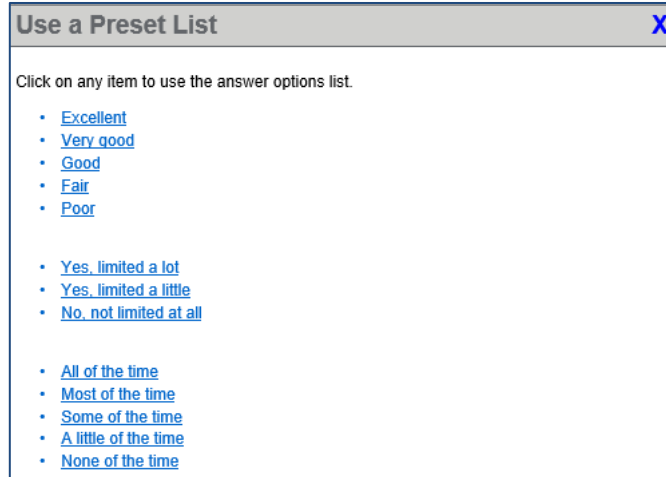
Save Cancel

Add Questions

The Add Question screen shows:

- **Question Variable:** this field is used to identify the question on tabled reports and data exports. The “?” displays the restrictions on the field:
 - Can only contain lower-case letters (a-z), upper-case letters (A-Z), numbers (0-9), and underscore(_)
 - Cannot contain spaces
 - Must be unique, not previously used in the configure surveys set up
 - Maximum of 100 characters
 - Cannot be a reserved name used as part of SMS code. See Appendix A for listing of reserved names.
- **Question Type:** the format of the question can be selected from the dropdown choices:
 - Textbox (Single) : one line response.

- Textbox (Multiple lines): responses that can be longer than one line.
- Multiple Choice (Dropdown): when configuring the dropdown, separate the answer options with a carriage return. Also available with this question type are preset options, select [Use Preset List](#) and click on any item to use the answer option list.



Multiple Choice (Radio Buttons): when configuring the multiple choice radio buttons, separate the answer options with a carriage return. Also available with this question type are preset options, select [Use Preset List](#) and click on any item to use the answer option list. Date: a calendar displays for selecting a date.

- **Question Text:** displays the question to be answered.
- **Answer Required?:** check the box if the respondents must answer the question.
- **Question Status:** defaults to Active. Use the dropdown to select Inactive if the question no longer needs to be asked.

Select the “Save” button to save the question or “Cancel” button to leave the screen. The Configure Survey Questions screen will now display your question. In the Actions column, you can select [Edit Question](#), [Delete Question](#) or [Inactivate Question](#). Note: Once there are responses to the survey, questions can no longer be deleted. Inactivate question will stop the question from being displayed.

Configure Survey Questions

Setup Edit Setup

Survey: SF-12v2® Health Survey MH Enhanced

Location on Survey: End

Group: Behavioral Health Demo (BHDEMO)

Instructions:

Questions Preview Add Question

	Display Order	Question Variable	Question Text	Type	Answer Options	Required	Status	Actions
	1	Breakfast1	Did you eat breakfast this morning?	Multiple Choice (Dropdown)	<ul style="list-style-type: none"> • Yes • No • Required to fast • I don't remember 	Yes	Active	Edit Question Delete Question Inactivate Question

Select the Add Question button to add another question to the Additional Questions screen.

Questions

Preview Add Question

	Display Order	Question Variable	Question Text	Type	Answer Options	Required	Status	Actions
▼	1	Breakfast1	Did you eat breakfast this morning?	Multiple Choice (Dropdown)	<ul style="list-style-type: none"> • Yes • No • Required to fast • I don't remember 	Yes	Active	Edit Question Delete Question Inactivate Question
▲ ▼	2	Breakfast2	If you ate breakfast, what beverage did you drink for breakfast?	Multiple Choice (Radio Buttons)	<ul style="list-style-type: none"> • Orange Juice • Coffee • Tea • Milk • Water • None of the above 	No	Active	Edit Question Delete Question Inactivate Question
▲ ▼	3	Breakfast3	If you ate breakfast, what did you eat?	Textbox (Single Line)		No	Active	Edit Question Delete Question Inactivate Question
▲ ▼	4	Breakfast4	If you see a nutritionist, when was your last visit?	Date		No	Active	Edit Question Delete Question Inactivate Question
▲	5	Breakfast5	Describe the reason you decided you should see the nutritionist.	Textbox (Multiple Lines)		No	Active	Edit Question Delete Question Inactivate Question

Reorder Questions

Use the blue up and down arrows on the far left to reorder questions. The Display Order column will sequentially readjust as you change the order of the questions.

Preview Additional Questions

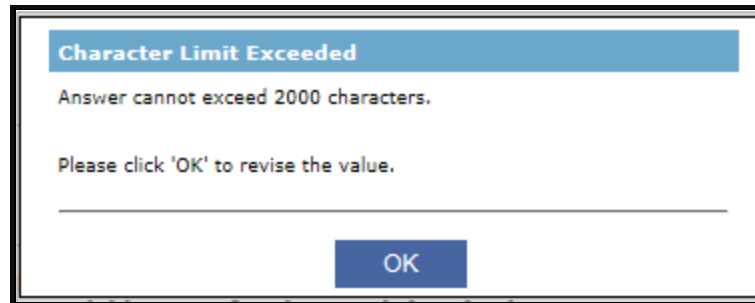
Select the Preview button to see what the additional questions screen will look like.

Survey Responses

The additional questions are displayed at the bottom of the Survey Responses section of the PRO Survey Provider Reports. If a question has been changed to “Inactive” or a new question has been added, the report will note the change with an asterisk “*” and note at the bottom “*Question did not appear on survey at the time of administration.”

	A little of the time	Some of the time																		
<table border="1"> <thead> <tr> <th>Additional Questions</th> <th>Previous</th> <th>Current</th> </tr> </thead> <tbody> <tr> <td>Did you eat breakfast this morning?</td> <td>*</td> <td>Yes</td> </tr> <tr> <td>If you ate breakfast, what beverage did you drink for breakfast?</td> <td>*</td> <td>Coffee</td> </tr> <tr> <td>If you ate breakfast, what did you eat?</td> <td>*</td> <td>2 eggs and toast</td> </tr> <tr> <td>If you see a nutritionist, when was your last visit?</td> <td>*</td> <td>12/17/2020</td> </tr> <tr> <td>Describe the reason you decided you should see the nutritionist.</td> <td>*</td> <td>I want to live a healthier life. It is a good New Year's Resolution.</td> </tr> </tbody> </table>	Additional Questions	Previous	Current	Did you eat breakfast this morning?	*	Yes	If you ate breakfast, what beverage did you drink for breakfast?	*	Coffee	If you ate breakfast, what did you eat?	*	2 eggs and toast	If you see a nutritionist, when was your last visit?	*	12/17/2020	Describe the reason you decided you should see the nutritionist.	*	I want to live a healthier life. It is a good New Year's Resolution.		
Additional Questions	Previous	Current																		
Did you eat breakfast this morning?	*	Yes																		
If you ate breakfast, what beverage did you drink for breakfast?	*	Coffee																		
If you ate breakfast, what did you eat?	*	2 eggs and toast																		
If you see a nutritionist, when was your last visit?	*	12/17/2020																		
Describe the reason you decided you should see the nutritionist.	*	I want to live a healthier life. It is a good New Year's Resolution.																		
* Question did not appear on survey at the time of administration.																				


There is no character limit to how long a question can be; however, there is a 2000 character limit for responses. A pop-up message will appear if the response is longer than 2000 characters.

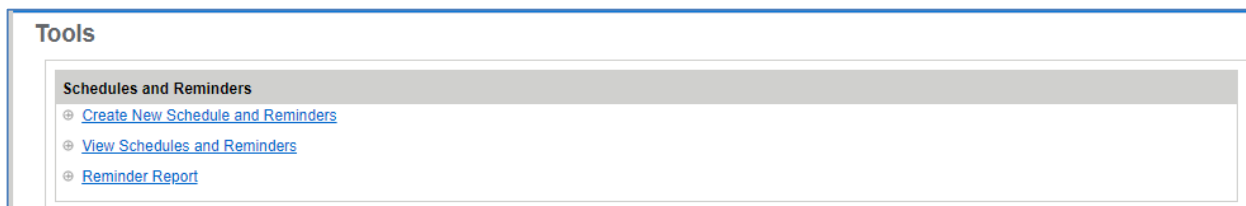


Note that both the question and the response are displayed on the Provider report. The response section is narrow as both Previous and Current columns are on the right side of the report.

Additional Questions	Previous	Current
Did you eat breakfast this morning?	Yes	No
If you ate breakfast, what beverage did you drink for breakfast?	Coffee	None of the above
If you ate breakfast, what did you eat?	cereal	Grabbed a granola bar and grapefruit juice
If you see a nutritionist, when was your last visit?	12/14/2020	12/16/2020
Describe the reason you decided you should see the nutritionist.	I thought it would be a good idea for me to improve my health. I also wanted to know what is the best breakfast to eat.	I wanted to ensure that my health improved. I have struggled with my weight all my life.

SCHEDULES AND REMINDERS

Schedules and Reminders are a series of surveys to be administered at pre-determined intervals (i.e. 30 day, 90 day, 1 year). Step by step instructions and Help  will guide on how to create schedules and reminders.



Create New Schedule and Reminders

To create a new schedule and reminder, select [Create New Schedule and Reminders.](#)

🔍 Create New Schedule and Reminders

*Field is required.

Schedule Details

*Site:

* Schedule Name:

* Schedule Status:

* Schedule Type: Fixed Time Interval - Baseline survey and then follow-up survey(s).
 Floating Time Interval – Take the same survey every days.

* Schedule Start Date: Member Specific – Each Member has a unique start date
 Schedule Launch Date - All Members have the same start date: (mm/dd/yyyy)

Baseline

* Timepoint:

* Survey to administer:

* Schedule Baseline survey to be taken: Days after Schedule Start Date

Reminders

[+ Add a Reminder](#)

Schedule Details

Enter the **Site** and **Schedule Name** in the Schedule Detail window. The **Schedule Status** will default to **Active**. When you want to inactivate the Schedule Reminder select **Inactive** from the **Schedule Status** dropdown list.

🔍 Create New Schedule and Reminders

*Field is required.

Schedule Details

*Site:

* Schedule Name:

* Schedule Status:

* Schedule Type: Fixed Time Interval - Baseline survey and then follow-up survey(s).
 Floating Time Interval – Take the same survey every days.

* Schedule Start Date: Member Specific – Each Member has a unique start date
 Schedule Launch Date - All Members have the same start date: (mm/dd/yyyy)

Select one of the two time interval **Schedule Type**: options.

- Fixed Time Interval:** These schedules consist of a baseline survey and then follow-up survey(s). An example of this would be a Pre-Operative Survey (for the baseline) and then follow-up Post-Operative Surveys (i.e. 1 year follow-up, 2 year follow-up . . .). Each survey (baseline & follow-ups) can be different surveys.
- Floating Time Interval:** These schedules allow Members to repeatedly take the same survey every <<#>> days. An example of this would be to have a Member take the same survey every 28 days (4 weeks). Once a survey is taken, the Member would have to wait another 28 days to take the survey again. Reminders for that survey also recur on the same interval.

Select the date at which Members will start receiving reminders using the Schedule Start Date: options.

- Member Specific:** Member Specific – Each Member has a unique start date. Survey dates are based on each Member's personalized start date. An example would be to set a Member survey date based on a surgery date or an examination date.
- Schedule Launch Date:** Survey dates for all Members are based on a common schedule launch date. An example would be to launch the survey 7 days after Thanksgiving.

Reminders

Reminders are an optional email or text* that may be sent to the Members for each survey. Reminders include a link to take the surveys. In the Baseline window, enter the name of the Timepoint, select the Survey to administer from the dropdown selection, and enter the Schedule Baseline survey to be taken by selecting the number and interval (Days, Weeks, Months, Years) after the Schedule Start Date.

*Currently, SMS text messaging is available for phone numbers in the USA and Canada.

Note: The Member's phone carriers standard text messaging charges apply to all messages received or sent.

Baseline

* Timepoint:

* Survey to administer:

* Schedule Baseline survey to be taken: Days after Schedule Start Date

Reminders

Click on [Add a Reminder](#) to set up your reminder. To include additional reminders at that timepoint, select [Add a Reminder](#) again. Enter the Reminder Name, the number interval to send after scheduled survey date, Text Template and/or Email Template from the dropdown. If using Email Reminders, select the Email Subject (default is Reminder to take your survey).

Baseline

* Timepoint:

* Survey to administer:

* Schedule Baseline survey to be taken: Days after Schedule Start Date

Reminders

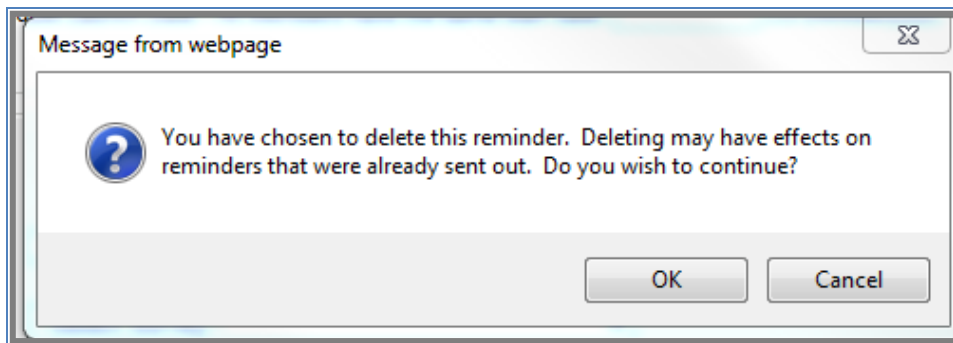
✘ Reminder Name: * Send: Days after scheduled survey date

Text Template:

Email Template:

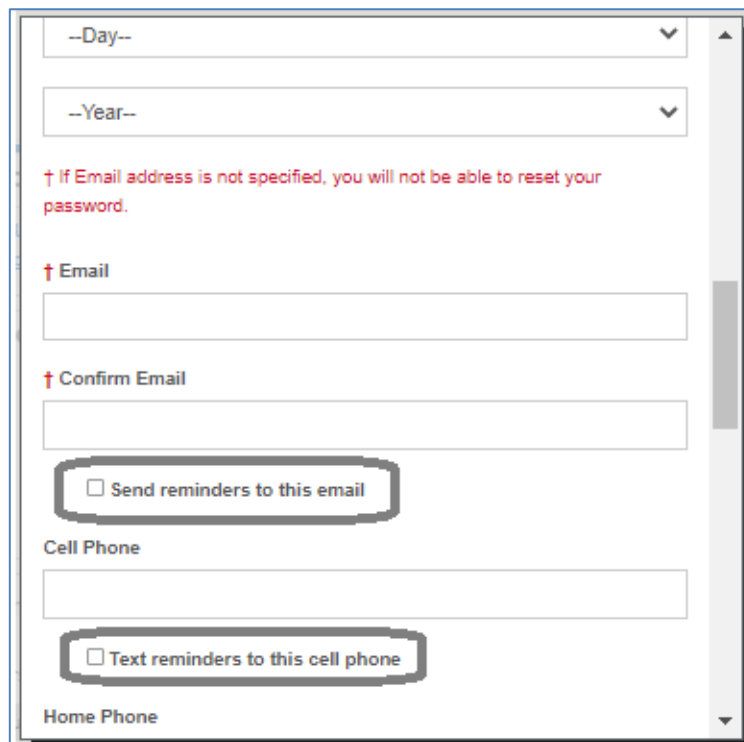
Email Subject:

To delete the reminder, select the **X**. A delete message will appear. “You have chosen to delete this reminder. Deleting may have effects on reminders that were already sent out. Do you wish to continue?” Select the Ok button or Cancel button to continue.



Member email and cell phone number

When you [Register a New Member](#), check the Email Reminder box 'Send reminders to this email' found below the Email and Confirm Email and/or the Text Reminder box 'Text reminders to this cell phone' under Cell Phone.



If the member is already set up in the site, the member's email and/or cell phone checkboxes can be found by selecting [Edit Member](#) under the **Actions** column of the Member Search Results, then under [Edit Member Information](#) select [Update Information](#).

Status	User Name	Last Name	First Name	Initials	Auxiliary ID	Actions
✖	ABastian					Take a Survey View Survey History Edit Member Delete Member
✖	JClark1					Take a Survey View Survey History Edit Member Delete Member

Edit Member Information X

User Name: ABastian Name:

[Update Information](#)

[Update Password](#)

[Add/Remove Sites](#)

[Update Member's Reminder Settings](#)

Multiple Reminders can be sent per survey (i.e. 1 month, 3 months, 6 months). Reminders are only sent if the survey(s) has not been taken in the expected survey(s) time period. The Members email or cell phone checkbox must be checked. The Reminder Settings are found under [Edit Member](#), then [Update Member's Reminder Settings](#).

Status	User Name	Last Name	First Name	Initials	Auxiliary ID	Actions
✖	ABastian					Take a Survey View Survey History Edit Member Delete Member
✖	JClark1					Take a Survey View Survey History Edit Member Delete Member

Edit Member Information X

User Name: ABastian Name:

[Update Information](#)

[Update Password](#)

[Add/Remove Sites](#)

[Update Member's Reminder Settings](#)

Update Reminder Settings

The information below is from your Member's Profile. Changing the information will also change your Member's Profile.

Please indicate if you would like to receive reminders.

Email Address:


Send reminders to this email


Cell Phone:

Text reminders to this cell phone


The Member is part of the following Schedules:


0 Days

Schedule Date: 

Status: 

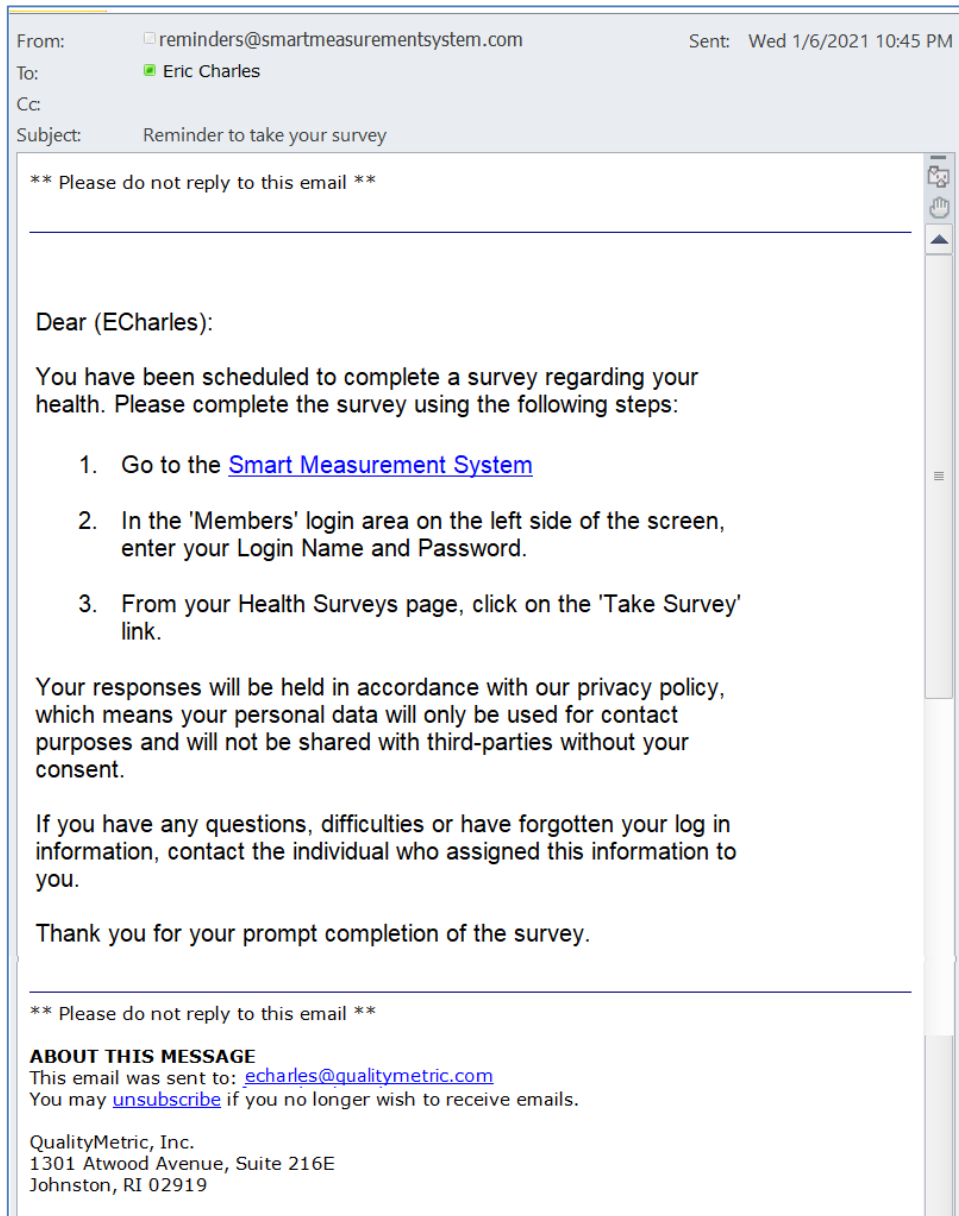
3 Months

Schedule Date: 

Status: 

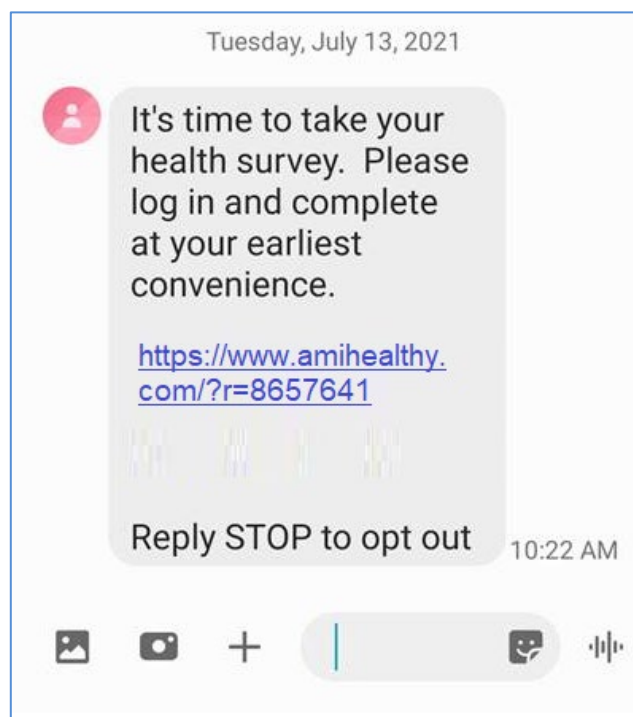
Reminder Emails to Member

Reminder emails are sent to a member once in a day. The Reminder engine sends emails at 11 AM, 2 PM, 5 PM, 8 PM, 11:45 PM Eastern time. When a reminder is sent, it will be marked and will not be resent to the member later in the day. The Reminder email template walks the Member through the steps they should follow to login and take their survey. Email reminders are 'From: reminders@smartmeasurementsystem.com.'



Reminder Text Messages to Member

Reminder text messages are sent to a member once in a day. The Reminder engine sends text messages at 11 AM, 2 PM, 5 PM, 8 PM, 11:45 PM Eastern time. When a text reminder is sent, it will be marked and will not be resent to the member later in the day. The Reminder text provides a link to login to the system and take their survey.



Opting Out Email

In accordance with the CAN SPAM Act of 2003, we have two methods for Members to unsubscribe/opt-out of receiving email reminders.

- amihealthy.com:** After logging into [amihealthy.com](https://www.amihealthy.com), any Member who receives email reminders will have an option to Opt-Out from receiving email reminders by de-selecting the Email Reminder box in their information profile. The Member would see the Email Reminder checkbox from the MY PROFILE tab and selecting [Update My Information](#).

QualityMetric
PRO Insight Smart Measurement® System

HOME MY PROFILE

Update My Information Update My Information / Update My Password

User Name jc0722B

First Name Jeffrey

Middle Name

Last Name Clark

Initials

Gender Male Female

Date of Birth --Month-- --Day-- --Year--

† If Email address is not specified, you will not be able to reset your password.

† Email jclark@qualitymetric.com

Send reminders to this email

Cell Phone

Text reminders to this cell phone

Home Phone

Reminder Emails: Every email sent will have a one click opt-out link at the bottom where you can also unsubscribe.

** Please do not reply to this email **

ABOUT THIS MESSAGE
This email was sent to: echarles@qualitymetric.com
You may [unsubscribe](#) if you no longer wish to receive emails.

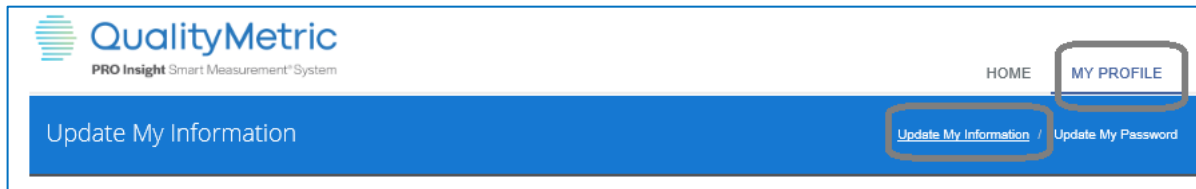
QualityMetric, Inc.
1301 Atwood Avenue, Suite 216E
Johnston, RI 02919

Opting Out Text Message

To opt out of text messaging, there are two options.

1. After logging into amihealthy.com, any Member who receives Text message reminders will have an option to Opt-Out from receiving text reminders by de-selecting the Text Reminder box in their information profile. The Member would

see the Text Reminder checkbox from the MY PROFILE tab and selecting [Update My Information](#).



Date of Birth

† If Email address is not specified, you will not be able to reset your password.

† Email

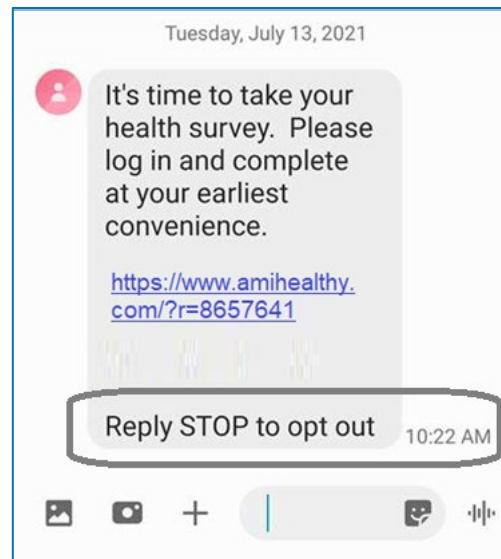
Send reminders to this email

Cell Phone

Text reminders to this cell phone

Home Phone

- Every text message sent will allow you to not receive future reminders. Displayed at the bottom of the text message is: "Reply STOP to opt out". Simply type "STOP" in reply and you have opted out.



View Schedules and Reminders

To view the schedules and reminders, select [View Schedules and Reminders](#) from the TOOLS tab.

Tools

Schedules and Reminders

- [Create New Schedule and Reminders](#)
- [View Schedules and Reminders](#)
- [Reminder Report](#)

The list of Schedules for the Site will display. If there is more than one site, select the site from the dropdown menu.

View Schedules

[Create New Schedule and Reminders](#)

Site: Asthma, rhinitis (Respiratory) ▼

Site	Schedule Name	Schedule Type	Schedule Start Date	Status	Options	Action
Asthma, rhinitis (Respiratory)	2021 Study	Fixed Time Interval	Member Specific	Active	Email Disclaimer: On Email Opt-out: On Text Opt-out: On	View Edit
Asthma, rhinitis (Respiratory)	Monthly	Floating Time Interval(30 days)	Member Specific	Active	Email Disclaimer: On Email Opt-out: On Text Opt-out: On	View Edit

Under the Action column, you can view the schedule by selecting [View](#).

The Schedule screen will display with the Timepoint, Survey Name, Survey Scheduled to be taken date and when Reminders will be sent columns.

Schedule: 2021 Study
Site: Asthma, rhinitis

[Return to Schedule List](#)

Timepoint	Survey Name	Survey Scheduled to be taken	Reminders
Baseline	SF-12v2® Health Survey (Advanced Reporting)	On Member's Start Date	0 Days
6 months	SF-12v2® Health Survey (Advanced Reporting)	180 days after Member's Start Date	180 Days
1 year	SF-12v2® Health Survey (Advanced Reporting)	365 days after Member's Start Date	365 Days

You can change the Schedule reminder by selecting [Edit](#).

The Edit Schedule and Reminders page appears displaying the details.

① Edit Schedule and Reminders

*Field is required.

Schedule Details

*Site:

* Schedule Name:

* Schedule Status:

* Schedule Type: Fixed Time Interval - Baseline survey and then follow-up survey(s).
 Floating Time Interval - Take the same survey every days.

* Schedule Start Date: Member Specific - Each Member has a unique start date
 Schedule Launch Date - All Members have the same start date: (mm/dd/yyyy)

Baseline

* Timepoint:

* Survey to administer:

* Schedule Baseline survey to be taken: Days after Schedule Start Date

Reminders

✘ Reminder Name: * Send: Days after scheduled survey date

Text Template:

Email Template:

Email Subject:

[Add a Reminder](#)

Follow-up Survey #1

* Timepoint:

* Survey to administer:

* Schedule Follow-up survey to be taken: Days after Schedule Start Date

Reminders

✘ Reminder Name: * Send: Days after scheduled survey date

Text Template:

Email Template:

Email Subject:

[Add a Reminder](#)

Follow-up Survey #2

Reminder Report

To view the Reminder Report, select [Reminder Report](#).

Reminder Report

Sites:

Timepoint:

Reminder Name:

Delivery Date Start:

Delivery Date End:

Delivery Method:

Member User Name:

Member First Name:

Member Last Name:

Member Email:

Member Cell Phone:

Member Auxiliary ID:

Report Format:

Similar to other Reports, use the Reminder Report feature to generate a report of Reminders that have occurred within your site(s). Narrow the search parameters for the report by making changes to the Reminder Report Criteria.


- **Sites:** Dropdown list that shows the name of your Site(s). The option to select – All Sites – is available at the top of the dropdown list.
- **Timepoint:** Select the Timepoint from the dropdown showing all configured Timepoint. The option to select – All Timepoints – is available at the top of the dropdown list.
- **Reminder Name:** Allows you to narrow your search to a specific Reminder. The option to select – All Reminders – is available at the top of the dropdown list.
- **Delivery Date Start:** Allows you to narrow your search to a specific start date.
- **Delivery Date End:** Allows you to narrow your search to a specific end date.
- **Delivery Method** Allows you to narrow your search to a specific delivery method.

- **Member User Name:** Allows you to narrow your search to a specific Member user name.
- **Member First Name:** Allows you to narrow your search to a specific Member first name.
- **Member Last Name:** Allows you to narrow your search to a specific Member last name.
- **Member Email:** Allows you to narrow your search to a specific Member email address.
- **Member Cell Phone:** Allows you to narrow your search to a specific Member cell phone number.
- **Member Auxiliary ID:** Allows you to narrow your search to a specific Member auxiliary ID.
- **Report Format:** The Report Format: the output format of the report (Web Page (*.htm), Excel (*.xls), CSV (Comma delimited) (*.csv)).

Select the Generate Report button and the Member records whose received reminders under the selected criteria are displayed.

Reminder Report

Sites:	<input type="text" value="Asthma, rhinitis (Respiratory)"/>
Timepoint:	<input type="text" value="Baseline"/>
Reminder Name:	<input type="text" value="- All Reminders -"/>
Delivery Date Start:	<input type="text" value="07/23/2021"/>
Delivery Date End:	<input type="text" value="07/23/2021"/>
Delivery Method:	<input type="text" value="- All Delivery Methods -"/>
Member User Name:	<input type="text"/>
Member First Name:	<input type="text"/>
Member Last Name:	<input type="text"/>
Member Email:	<input type="text"/>
Member Cell Phone:	<input type="text"/>
Member Auxiliary ID:	<input type="text"/>
Report Format:	<input type="text" value="Web Page (*.htm)"/>

										
Group Description	Group Login Name	Site Description	Site Login Name	Member User Name	Timepoint	Reminder Name	Delivery Date	Delivery Method	Delivered To	Status
Peak Healthcare	peakhealth	Asthma, rhinitis	Respiratory	jc0723	Baseline	Baseline	07/23/2021	Email	jclark@qualitymetric.com	Completed
Peak Healthcare	peakhealth	Asthma, rhinitis	Respiratory	jc0723	Baseline	Baseline	07/23/2021	Text	904-526-4888	Completed

ALERTS

Alerts provide a notification to designated professional users when a Member's health survey assessment scores or responses meet one or more alert conditions. These alert conditions are configurable based on declines, improvements or comparisons to values/cut-points. Selected email recipients will receive an email when alert conditions are triggered. The recipient can then log into SMS to access the Alerts report.

Tools

Alerts

- [Create New Alert](#)
- [View Alerts](#)
- [Alert Report](#)

Create New Alert

To create a new alert, select [Create New Alert](#).

? Create New Alert

*Alert Name:

Alert Status: Active

Group: Behavioral Health Demo (BHDEMO)

Sites to Include: Include all Sites

Barrington Hospital (Barrington Hospital)

Behavioral Health Site (BHSITE)

Lincoln Clinic (Lincoln)

Email List (Enter email addresses separated by commas, semi-colons or returns)

Alert Set-up

The following are set-up properties for an alert.

- **Alert Name:** Name associated with the alert. This will help easily identify the alert when multiple alerts exist. This will be included in the Alert Email.
- **Alert Status:** Select from the dropdown menu.

Active = Alert is actively being monitored. This is the default status.

Inactive = Alert is no longer being monitored.

- **Group:** Group associated with the Alert. If you have more than one Group, select the Group from the dropdown.
- **Sites to Include:** List of sites included with the alert. Use the 'checkbox' to include all sites in the alert. Sites added after the alert is set-up are automatically included in the alert if "Include all Sites" are selected.
- **Email List:** Email address recipient list of who will get an email when the alert is triggered. Emails can be entered separated by commas, semi-colons or line breaks/returns. Each email recipient will receive an email instructing them that an alert has been triggered and that they need to login to SMS and access the Alert report.

Condition Set up

There are three types of conditions that can be monitored.

- **Compare Single Assessment:** Monitor scores & responses for current survey results.
- **Compare Current to Baseline Assessment:** Monitors changes in Member Scores over time. Current survey assessment results are compared to the first survey assessment results.
- **Compare Current to Previous Assessment:** Monitors changes in Member Scores over time. Current survey assessment results are compared to the previous survey assessment results.

Alert Conditions

The situation that triggers the alert. More than one alert condition can be set up.

Item: The score or survey response you would like to monitor. Available scores and surveys are in the dropdown menu

Condition: This selection will determine when an alert is triggered.

When creating an alert that will monitor a single survey assessment:

The item being monitored

The operator (<, >, >=, <=, =, <>) you want to use

The raw value the score/response is being compared to

Example: MCS Score is < 42

When creating an alert that will compare to the baseline or the previous survey assessment:

The item being monitored

- Whether an increase or decrease is being tracked
- The raw value the score/response is being compared to
- Percentage change in value OR Number of points change in value

Example: PCS scores decreases by more than 5 points compared to the Baseline Survey

Alert conditions are inclusive (all conditions must be satisfied for the alert to be triggered). Missing responses or scores will not satisfy alert conditions.

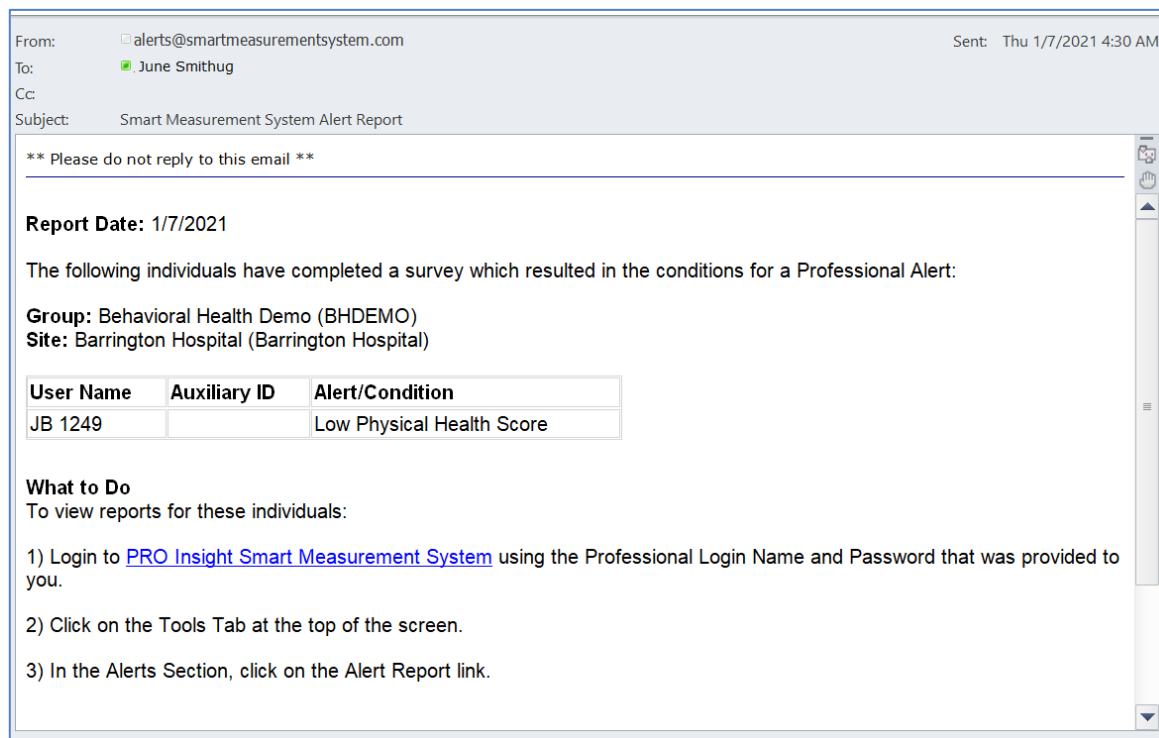
Alert Email

When alerts have been triggered, is the designated professional user will receive and email alerting them to log into SMS and access the Alerts report. Information included in the email:

- **User Name:** the member's user name in the system
- **Auxiliary ID:** a secondary identifier, if used
- **Alert/Condition:** Name of the Alert that was triggered

In order to be HIPAA compliant, protected health information related to the member such as Date of Birth, Gender and Scores will not be included in the email.

Alert emails are sent overnight From: Alerts@smartmeasurementsystem.com



View Alert

To view Alerts that have been previously set up, select [View Alert](#).

Action	Alert Name	Alert Type	Status	Alert Report
Edit	Low Physical Health Score	Single Assessment	Active	View
Edit	MCS Well Below	Single Assessment	Active	View
Edit	MH05 less than 6	Single Assessment	Active	View

A list of Alerts are shown in a table format.

- **Action:** Selecting [Edit](#) will allow edits to the current alert.
- **Alert Name:** Shows the Alert Name.
- **Alert Type:** Shows if the Alert is on a single survey or if it is on comparable surveys.
- **Status:** Shows if the Alert is Active or no longer used and set to Inactive.
- **Alert Report:** Selecting [View](#) will display the alert information for the Member records.

Alert Report

To view the Alert report(s) select [View Alert](#).

The screenshot shows the 'Alert Report' form with the following fields and options:

- Group:** Behavioral Health Demo (BHDEMO) (dropdown menu)
- Sites to Include:**
 - Include all Sites
 - Barrington Hospital (Barrington Hospital)
 - Behavioral Health Site (BHSITE)
 - Lincoln Clinic (Lincoln)
- Alert:** Low Physical Health Score (dropdown menu)
- Alert Start Date:** (calendar icon)
- Alert End Date:** (calendar icon)
- Member User Name:** (text input)
- Member Auxiliary ID:** (text input)
- Member Last Name:** (text input)
- Member First Name:** (text input)

A 'Generate Report' button is located at the bottom center of the form.

Similar to other Reports, use the Alert Report feature to generate a report of Alerts that have occurred within your site(s). Narrow the search parameters for the report by making changes to the Alert Report Criteria.

- **Group:** Shows the name of your group.
- **Sites to include:** Use the checkbox to “Include all Sites” or select a specific site.
- **Alert:** Select the Alert from dropdown showing all configured Alerts.
- **Alert Start Date:** Allows you to narrow your search to a specific start date.
- **Alert End Date:** Allows you to narrow your search to a specific end date.
- **Member User Name:** Allows you to narrow your search to a specific Member user name.
- **Member Auxiliary ID:** Allows you to narrow your search to a specific Member auxiliary ID.
- **Member Last Name:** Allows you to narrow your search to a specific Member last name.
- **Member First Name:** Allows you to narrow your search to a specific Member first name.

Select the Generate Report button and the Member records whose answers trigger an alert are displayed. For each Member record, you can the reports by selecting the [View Report](#).

Alert Report

Group: Behavioral Health Demo (BHDEMO) ▼

Sites to Include: Include all Sites
 Barrington Hospital (Barrington Hospital)
 Behavioral Health Site (BHSITE)
 Lincoln Clinic (Lincoln)

Alert: MCS Well Below ▼

Alert Start Date:

Alert End Date:

Member User Name:

Member Auxiliary ID:

Member Last Name:

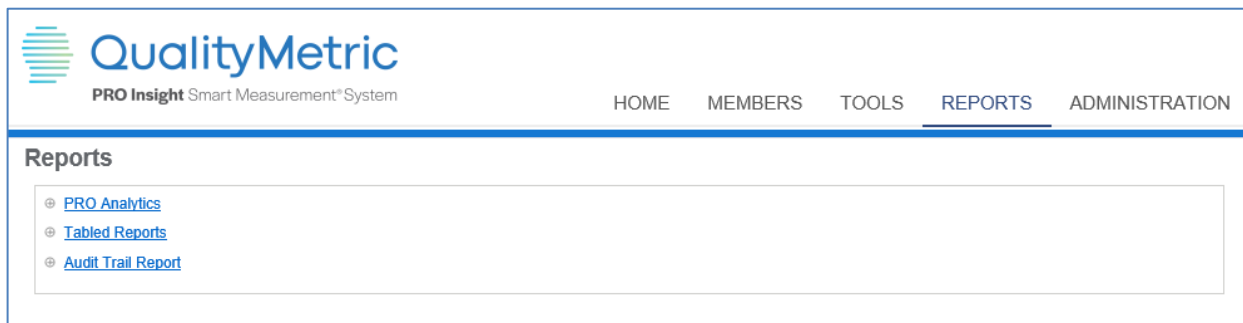
Member First Name:

Your query returned 3 records. Currently displaying records 1 through 3.
 ◀ Previous 100 Records | ◀ First 100 Records | Next 100 Records ▶

Member	Alert	Survey
Name: User Name: ajbiron Auxiliary ID: DOB: Gender:	Alert: MCS Well Below Alert Date: 05/15/2019	Survey: SF-12v2® Health Survey MH Enhanced Survey Date: 05/14/2019 Patient Report: View Report Physician Report: View Report
Name: User Name: JB 1249 Auxiliary ID: DOB: Gender:	Alert: MCS Well Below Alert Date: 01/06/2021	Survey: SF-12v2® Health Survey MH Enhanced Survey Date: 01/06/2021 Patient Report: View Report Physician Report: View Report
Name: Biron, Janet User Name: JAB0718 Auxiliary ID: DOB: 07/18/1968 Gender: F	Alert: MCS Well Below Alert Date: 01/17/2019	Survey: SF-12v2® Health Survey MH Enhanced Survey Date: 01/17/2019 Patient Report: View Report Physician Report: View Report

REPORTS

To access reports, click the “Reports” tab. Professionals with the pre-requisite level of access will be able to view Group or Site level reports. These reports include PRO Analytics, Tabled Reports and Audit Trail Report.



PRO ANALYTICS

PRO Analytics is a data visualization tool that enables professionals to track

changes in health over time and to compare treatments, programs, Members/Patients, and populations. It is a comprehensive, interactive, and user-friendly interface with a modern dashboard design and customized visualizations.

PRO Analytics may be available for your Group. PRO Analytics is a purchased feature and set up at that time. If you have access to this tool, click the link to launch it. PRO Analytics has its own user guide, found at the top of the PRO Analytics page.

For further information, contact your Account Executive.

TABLED REPORTS


Use the Tabled Reports feature to generate a report of survey administrations within your site(s). Narrow the search parameters for the report by making changes to the Report Criteria. Choose to have the results returned to you in, web-based (.html), Microsoft Excel (.xls), Comma-separated values (.csv), or comma-delineated text file (.txt), Text tab delimited (.txt) and Pipe delimited (.txt) formats.


Tabled Reports

? Enter Criteria & Report Format below:

Site:

Survey:

Start Date: 

End Date: 

Members:

Report Format:

Listed below are the various search criteria and a brief explanation of each.


- **Site:** the Site to be included in the search. Only Group Administrators and above have the pre-requisite level of access to alter this field.
- **Survey:** the Survey to be reported on.
- **Start Date:** the Survey Administration starting date to search on.
- **End Date:** the Survey Administration ending date to search on.
- **Members:** the Active State (Both Active and Inactive Members, Active Members Only, Inactive Members Only) for Members to be searched on.
- **Report Format:** the output format of the report (web-based (.html), Microsoft Excel (.xls), Comma-separated values (.csv), or comma-delineated text file (.txt), Text tab delimited (.txt) and Pipe delimited (.txt) formats)

Note: Depending on the number of Survey Administrations your members have taken, the Tabled Reports may take an extended period of time to generate. Please give the reports ample time to generate (up to a full minute) before attempting to run the report again. If it does not succeed, or takes too long to return results, you can try limiting the search criteria.

AUDIT TRAIL REPORT

The Audit Trail report is a comprehensive report outlining the various changes that have been made. Like the reports above, the Audit Trail Report allows you to filter on specific criteria.

Filtered categories include: Group, Sites to Include, Changes Made By, Audit Event, Start Date, End Date, Member User Name, Member Auxiliary ID, Member Last Name, and Member First Name. The Report can be presented in three formats - Web Page, Excel, or .csv (comma delimited).

		
Audit Event	Who made the change	What was changed
Audit Trail ID: 3657734 Date: 1/6/2021 6:35:55 PM Description: Change Member Password Full Description: Professional updated Member password	Type: Professional Id: 77257 Description: jsmithug	Type: Member Id: 13313973 Description: JB 1249 Old Value: New Value: Reason for Edit: Comment:
Audit Trail ID: 3657733 Date: 1/6/2021 6:35:07 PM Description: Update Member Full Description: MiddleName	Type: Professional Id: 77257 Description: jsmithug	Type: Member Id: 13312266 Description: AB1230 Old Value: New Value: K Reason for Edit: Comment:

CHAPTER 4 PRO INSIGHT FOR MEMBERS

PRO Insight offers Individuals, Members, Patients, and Subjects the following features:

- Secure and confidential login and registration process.
- Immediate feedback of scores and interpretations for member and clinician use.
- Ability to track changes in personal health over time.
- Opportunity for improved member-clinician communication regarding the impact of illness and treatment on the member.
- Make the data meaningful and link the outcomes to the improvement process.

Members can self-register and/or access an established membership to complete surveys and view results online using the Member portal.

The screenshot shows the QualityMetric PRO Insight login interface. At the top left is the QualityMetric logo and the text 'PRO Insight Smart Measurement System'. At the top right is a language dropdown menu set to 'English'. The main content area is divided into two columns. The left column is titled 'Members' and includes a sub-header 'Individuals, Members, Patients and Subjects logging in to take a survey'. It contains a 'Login Name' input field, a 'Password' input field, and a blue 'Login' button. Below these are links for 'Forgot Password?', 'Forgot Login Name?', and 'Register Now'. The right column is titled 'Professionals' and includes a sub-header 'Providers, Administrators and other Health Care Professionals'. It also contains a 'Login Name' input field, a 'Password' input field, and a blue 'Login' button. Below these are links for 'Forgot Password?' and 'Forgot Login Name?'. At the bottom of the page is a dark footer with the text '© 2021 QualityMetric Inc. All Rights Reserved.' and links for 'PRIVACY' and 'CONTACT US'.

MEMBER REGISTRATION STEPS

Each group practice sets up procedures for registering new members on the [amlhealthy.com](https://www.amlhealthy.com) website, whether handled by a healthcare professional or the member.

Member registration can occur:

1. During the scheduling of the intake appointment,

2. After the appointment has been made, as part of the office routine,
 3. At a central administrative office,
 4. By the member at home, if they have access to the internet
- Note:** Site Name is required when a member self-registers

Below are the steps to register on www.amlhealthy.com using the Member portal:

1. Go to www.amlhealthy.com
2. Beneath “Members”, click on the “Register Now” link to register
3. Complete the member registration form. and click submit.

Register and Become a Member

Please enter your registration information in the form below.

* Field is required.

* User Name

* Password

* Confirm Password

First Name

Middle Name

Last Name

Initials

Gender Male Female

Date of Birth --Month-- --Day-- --Year--

† If Email address is not specified, you will not be able to reset your password.

† Email

† Confirm Email

Home Phone

Work/Alternate Phone

Cell Phone

Address 1

Address 2

City

State

Zip/Postal Code

Country

Email Reminder

Please enter the Site Name provided to you by your clinic or health care provider.

* Site Name

If your clinic or Health Care Provider provided you with a unique identifier, please enter that information below.

Auxiliary ID

4. Make sure the Site Name is correct before you click submit.

* Site Name

If your clinic or Health Care Provider provided you with a unique identifier, please enter that information below.

Auxiliary ID

PRO Insight will then open to HOME screen and display the surveys available to be taken by the member.

Member should be instructed on how and when to complete the survey online based on the defined protocol.

PRO Insight Smart Measurement System HOME MY PROFILE

Health Surveys

Barrington Hospital

CHAI™ Survey Name Override	Take Survey History
SF-12v2® Health Survey MH Enhanced	Take Survey History
SF-12v2® Health Survey: United States (Spanish)	Take Survey History

MEMBER LOGIN STEPS

Below are the steps for taking a survey on www.amlhealthy.com:

1. Go to www.amlhealthy.com
2. Under the “Members” section, log in using the *Login Name* and *Password* entered during member registration and click on the “Login” button.

QualityMetric
PRO Insight Smart Measurement System English

Members
Individuals, Members, Patients and Subjects logging in to take a survey

[Forgot Password?](#)
[Forgot Login Name?](#)
[Register Now](#)

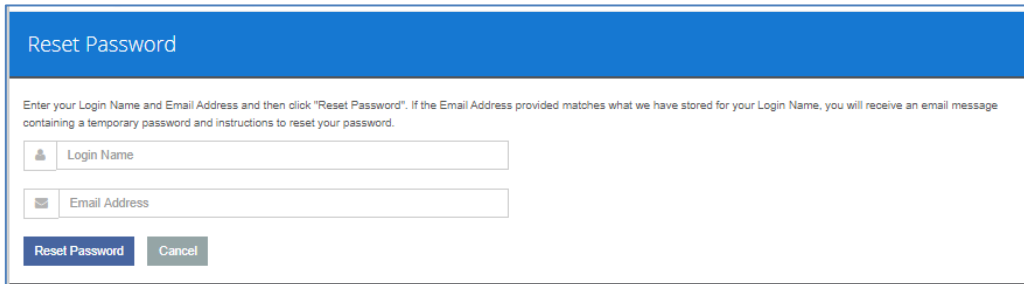
Professionals
Providers, Administrators and other Health Care Professionals

[Forgot Password?](#)
[Forgot Login Name?](#)

© 2021 QualityMetric Inc. All Rights Reserved. [PRIVACY](#) [CONTACT US](#)

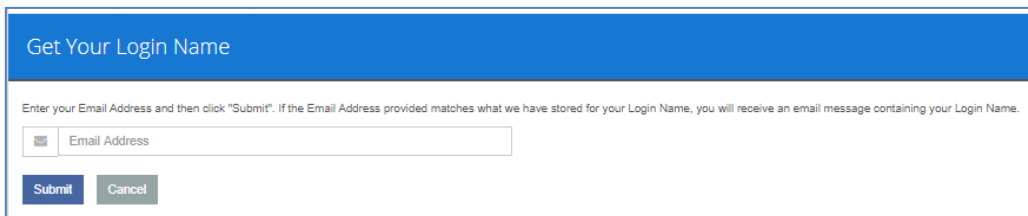
Forgot Password: If you have forgotten your password, click on the “[Forgot Password?](#)” link. The Reset Password screen appears.

You will be required to enter your Login Name and Email. If the Email Address provided matches what is stored for your Login Name, you will receive an email message containing a temporary password and instructions to reset your password.

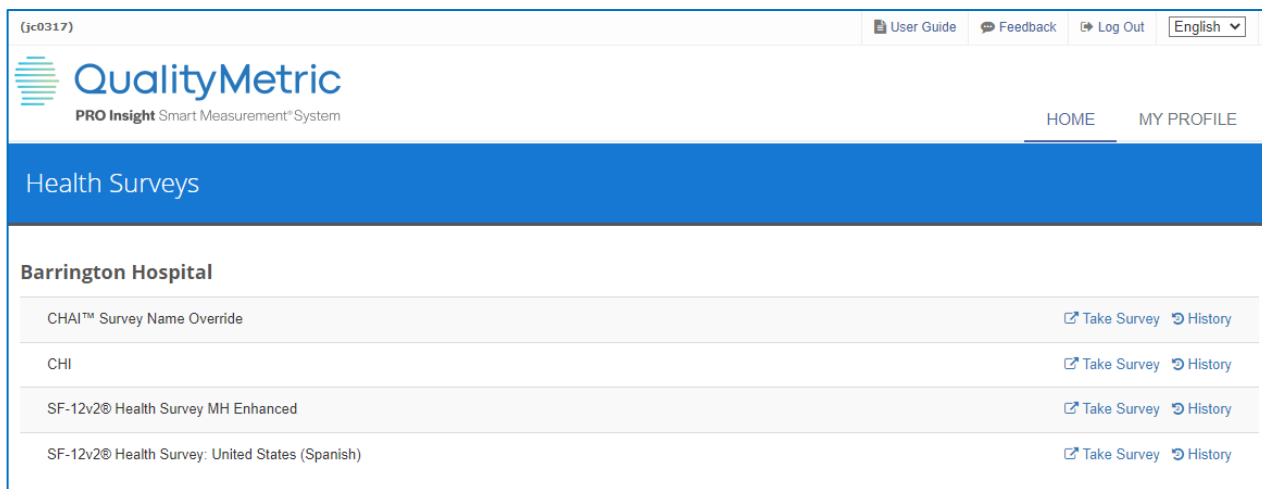


Forgot Login Name: If you have forgotten your Login Name, click on the “[Forgot Login Name?](#)” link. The Get Your Login Name appears.

You will be required to enter your Email. If the Email Address provided matches what is stored for your Login Name, you will receive an email message containing your Login Name.



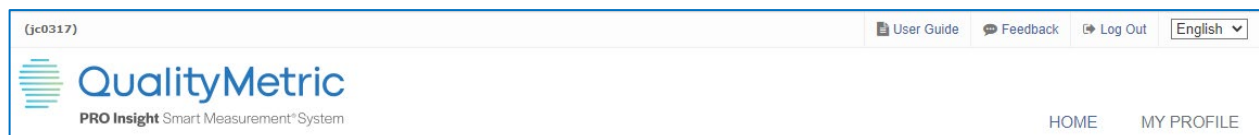
After logging in your Home tab will display on the screen.



Barrington Hospital	
CHAI™ Survey Name Override	Take Survey History
CHI	Take Survey History
SF-12v2® Health Survey MH Enhanced	Take Survey History
SF-12v2® Health Survey: United States (Spanish)	Take Survey History

TOP OF THE SCREEN

At the very top of the screen there are a few items displayed. Top left will show your Login Name in parenthesis. The top right shows the User Guide icon to click, Feedback icon which will allow you to provide comments to QualityMetric, and the Log Out icon you can click to exit of the application. Lastly, you can use the dropdown to select English or Spanish as the language for the screens. Note: The Feedback Icon is only available as an English screens.



NAVIGATION TABS FOR MEMBERS

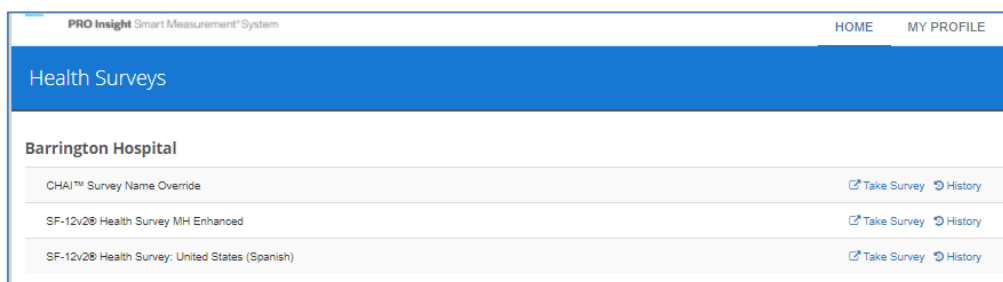
The navigation tabs are located at the top right section of the screens. There are two tabs for Members: Home and My Profile.

Screens show the following items:

- **Login Name:** On the top left side, your login name is displayed.
- **User Guide:** On the top right side, click the link to access the User Guide for assistance.
- **Feedback:** On the top right side click the link to access the Feedback page to provide comment on the application. (only available in English)
- **Logout:** On the top right side, click the Logout link to exit PRO Insight
- **Language Dropdown:** On the right side, select English or Spanish language for your screens. (Feedback is only available in English)
- **HOME:** On the right side, the Home tab shows your surveys.
- **MY PROFILE:** On the right side, the MY PROFILE tab shows your information.

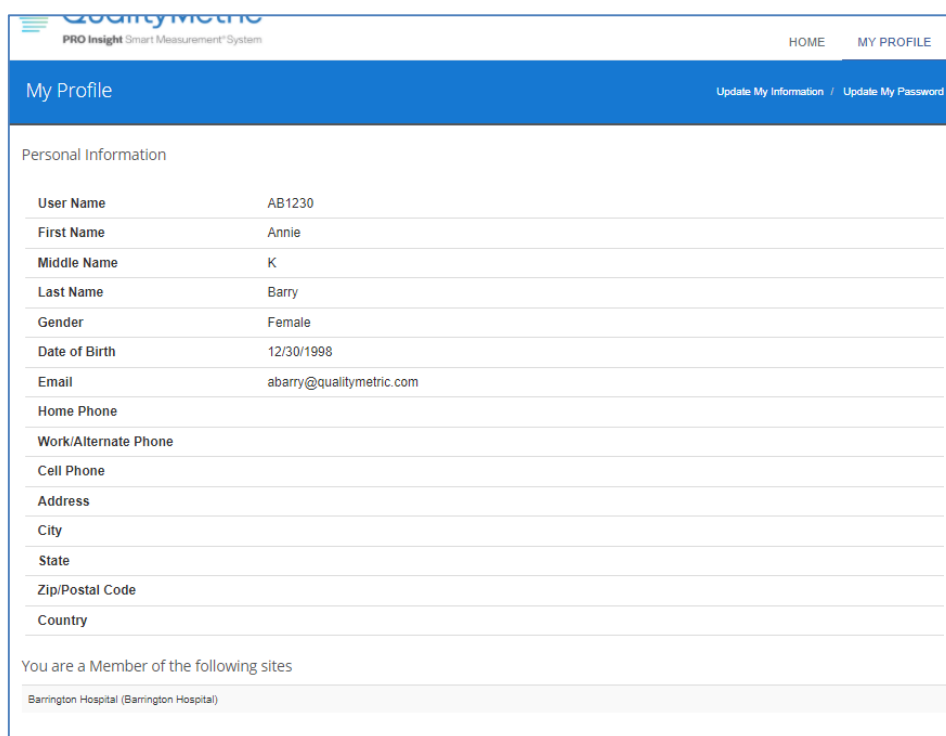
HOME

The Home screen will appear upon successful login. It is where you take surveys that are associated with your Group. Your Group name is the header over your available Surveys. Across from your surveys are two links: Take Survey and History.



MY PROFILE

The My Profile tab shows the same information at the top of the screen. Then, within the orange banner there are two links: Update My Information and Update My Password. The rest of the screen shows your personal information and the site(s) in which you are associated.



Update My Information

When you Click the Update My Information link, the Update Your Information screen appears. Use this feature when you want to change information in your profile.

Update My Password

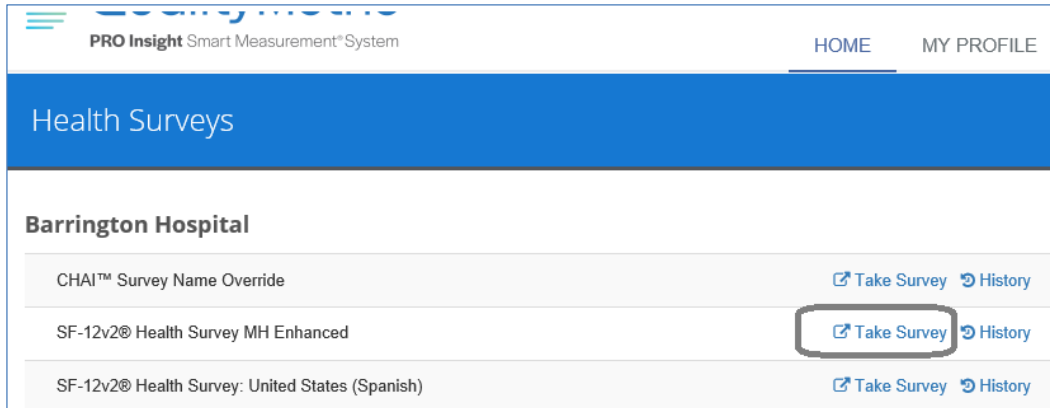
When you Click the Update My Password link, the Update Your Password screen appears. Use this feature when you want to change your password.

COMPLETING A SURVEY ONLINE


The Member’s Home screen will only display the surveys associated with the member’s site account.

TAKE SURVEY

1. Find the Survey Name (e.g.; SF-12v2® Health Survey MH Enhanced, etc.) to be administered.
2. Select the Take Survey link and the Survey will appear.



3. Complete the survey by:
 - a. Entering the Survey Date
 - b. Answering the questions on the screen
 - c. Clicking the Next Button to move to the next screen
 - d. At the end of the survey, clicking Submit.


SF-12v2® Health Survey MH Enhanced

This survey asks for your views about your health. This information will help you keep track of how you feel and how well you are able to do your usual activities. *Thank you for completing this survey!*

For each of the following questions, please click the circle that best describes your answer.

Survey Date:
Timepoint:

1) In general, would you say your health is:

Excellent	Very good	Good	Fair	Poor
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2) The following questions are about activities you might do during a typical day. Does your health now limit you in these activities? If so, how much?

	Yes, limited a lot	Yes, limited a little	No, not limited at all
a. <u>Moderate activities</u> , such as moving a table, pushing a vacuum cleaner, bowling, or playing golf	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Climbing <u>several</u> flights of stairs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

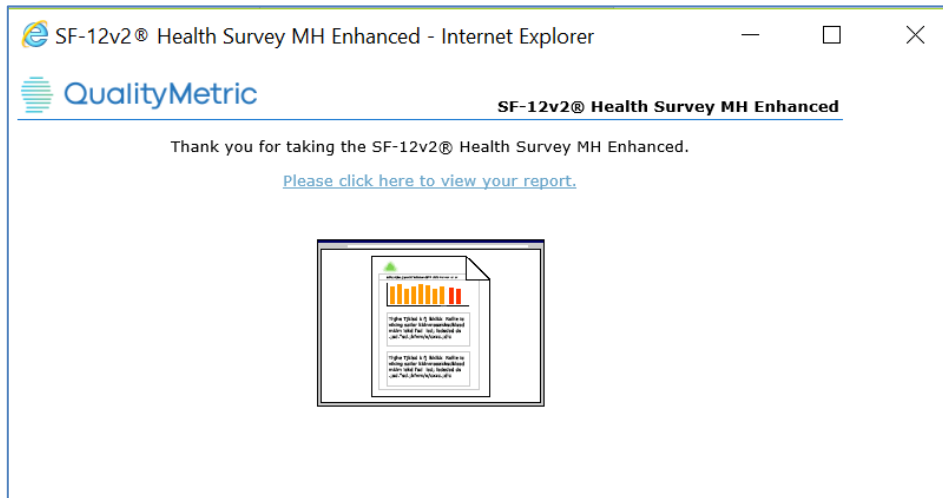
3) During the past 4 weeks, how much of the time have you had any of the following problems with your work or other regular daily activities as a result of your physical health?

	All of the time	Most of the time	Some of the time	A little of the time	None of the time
a. <u>Accomplished less</u> than you would like	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Were limited in the <u>kind</u> of work or other activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Clear
Next

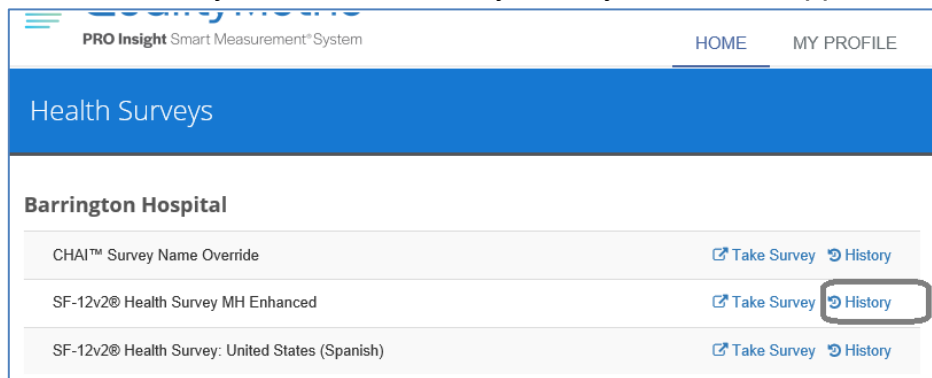
SF-12v2® Health Survey – MH Enhanced © 1994, 2002, 2008 QualityMetric Incorporated. All rights reserved. SF-12® is a registered trademark of Medical Outcomes Trust. United States (English) Standard

4. After completing a survey online, the member will have access to a Member Report. Click the link: [Please click here to view your report.](#)

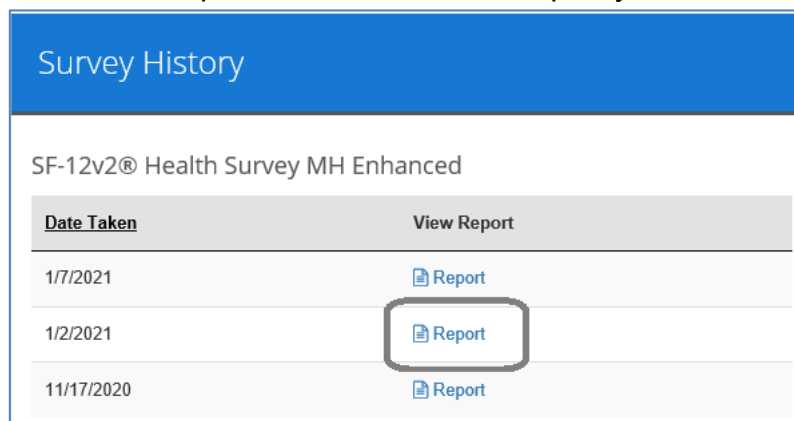


HISTORY

1. Find the Survey Name (e.g.; SF-12v2® Health Survey MH Enhanced, etc.) in which you want to view the history.
2. Click the History link and the Survey History screen will appear.



3. Under the View Report column, click the Report you want to view.



4. The Member Report for the selected Date Taken will open.

MEMBER REPORTS

Member reports are presented to the member upon completion of most surveys. Member reports for most surveys (including the SF Health Surveys) include the following sections:

- **Your Scores:** Provides the score(s) for the newly completed survey.
- **What Your Scores Mean:** Provides an interpretation of the score(s), usually relative to the general member population. The application can be configured to include additional benchmarks for comparison such as condition specific and regional insurance status.
- **Your History:** Provides the score and interpretation for the last six surveys to visually represent the member's progress over time.
- **Your Progress:** Provides a comparison for current vs previous and /or current vs baseline scores with a progress interpretation.

Other report formats are utilized for some surveys.

SF-12v2 HEALTH SURVEY MH ENHANCED MEMBER REPORT (SAMPLE)

An example of a Member Report is shown on the following pages.

Physical Health Summary and Mental Health Summary compared to the General Population

Member Report
Print | English

Member: Annie Barry
Age: 22
Gender: Female

Survey: SF-12v2® Health Survey MH Enhanced
Date Taken: Jan 07, 2021
Timepoint: 6 Months
Compare my score to: General Population

Physical Health Summary

Your Score 51

Worse Health Better Health

Your current score indicates that you are **same or better** than the general population of similar age and gender.

You have indicated significant difficulties with:

- Impact on activities due to bodily pain

Your History

■ Well Below ■ Below ■ Same or Better

Mental Health Summary

Your Score 31

Worse Health Better Health

Your current score indicates that you are **well below** than the general population of similar age and gender.

You have indicated significant difficulties with:

- Energy level
- Emotional well-being

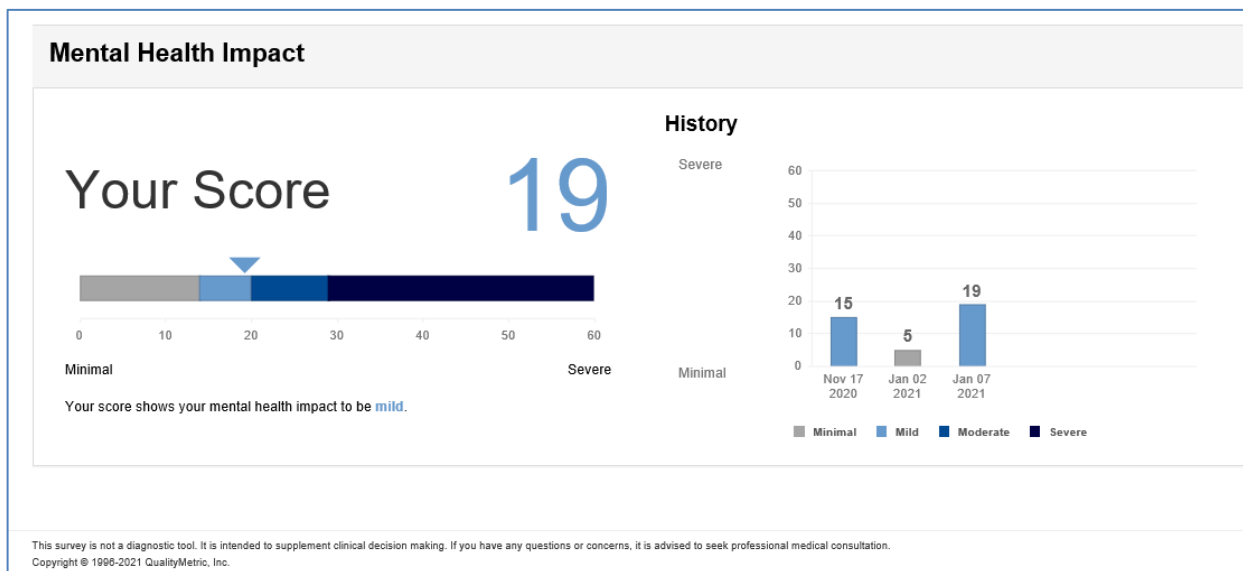
Your History

■ Well Below ■ Below ■ Same or Better

Progress

Physical Health Progress			
	Date	Score	
Current:	Jan 07, 2021	51	Your score is better than your previous survey
Previous:	Jan 02, 2021	45	
Current:	Jan 07, 2021	51	Your score is about the same as your baseline survey
Baseline:	Nov 17, 2020	53	

Mental Health Progress			
	Date	Score	
Current:	Jan 07, 2021	31	Your score is worse than your previous survey
Previous:	Jan 02, 2021	53	
Current:	Jan 07, 2021	31	Your score is worse than your baseline survey
Baseline:	Nov 17, 2020	40	



PRO Insight allows you the ability to compare your score to the general population or a benchmark population. If your project includes benchmarks, you can select to view your Member Report comparing your score to the benchmark by selecting from the **Compare my score to:** dropdown.

Member Report Print | English

Member: Annie Barry
 Age: 22
 Gender: Female

Survey: SF-12v2® Health Survey MH Enhanced
 Date Taken: Jan 07, 2021
 Timepoint: 0 Months

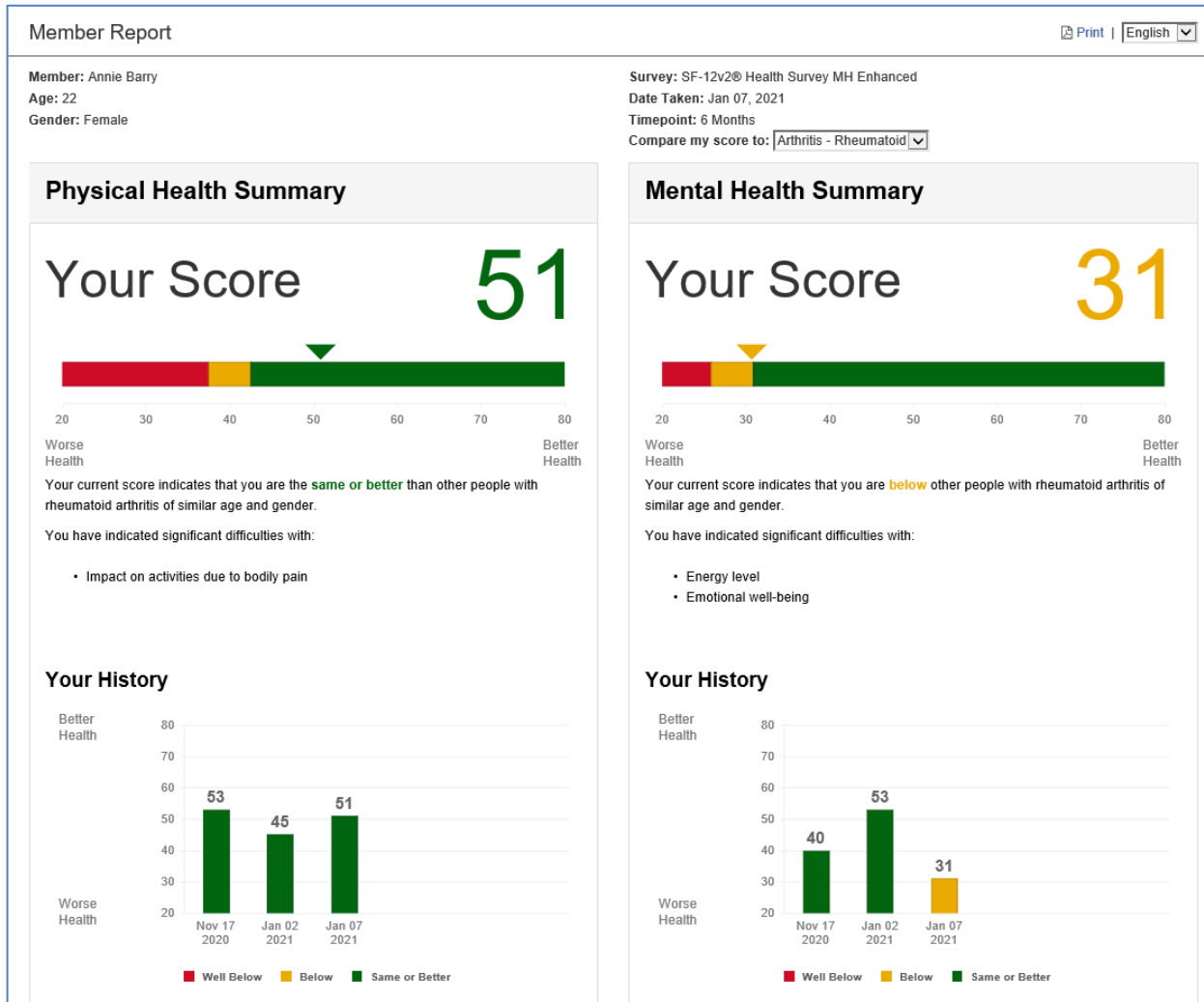
Compare my score to: General Population

Physical Health Summary **Mental Health Summary**

In the example on the next page, the benchmark is changed from General Population to Arthritis – Rheumatoid. Notice the Mental Health Summary was **red**/"well below" compared to the general population but changes to **yellow**/"below" when compared to member's with rhemautoid arthritis.


Physical Health Summary and Mental Health Summary compared to the Arthritis – Rheumatoid Population

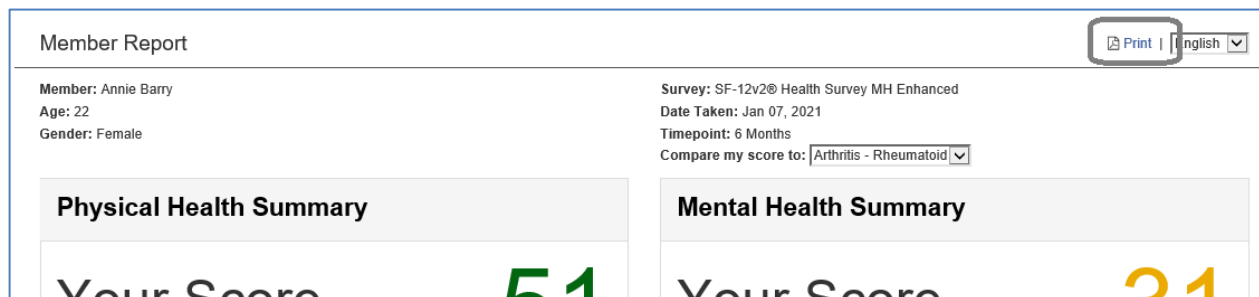
By comparing the member’s score to others in the Arthritis – Rheumatoid population, the member’s **Physical Health Summary** shows “Your current score indicates that you are **same or better** than an rheumatoid arthritis population of similar age and gender”. The member’s **Mental Health Summary** shows “Your current score indicates that you are **below** other people with rheumatoid arthritis of similar age and gender.”



The **Progress** and **Mental Health Impact** sections of the report are not linked to the benchmark and remain the same.

PRINTING A REPORT

1. To print your report, click on the Print icon ( Print) in the upper right corner.



Member Report

Member: Annie Barry
Age: 22
Gender: Female

Survey: SF-12v2® Health Survey MH Enhanced
Date Taken: Jan 07, 2021
Timepoint: 6 Months
Compare my score to: Arthritis - Rheumatoid

Physical Health Summary
Your Score **51**

Mental Health Summary
Your Score **21**

2. A window will open for you to save the .pdf report to your computer. **Note:** browsers display this .pdf window typically at the bottom of your screen.
3. Open the report in Adobe Reader to print.

* **Note:** Do not use the browser print option. The format of the report will not be readable.

CHAPTER 5 IMPLEMENTATION SUGGESTIONS

To assist you in implementing your health assessment data collection effort, we offer some practical advice. Make strategic decisions about the population you'd like to monitor. As much as possible, integrate the data collection into your day-to-day office routine. Aim for clinical "ownership" of the measurement process. Make the data meaningful and link the outcomes to the improvement process.

PROFESSIONAL LEVELS OF ACCESS

PRO Insight includes secure access for all healthcare professionals assigned to the group account. When the initial survey purchase is made, the group account and group administrator level of access is established. Optional data management features are available to the professional to ensure greater data control and security. Professional accounts with differing levels of access can be established as desired and administered by the group administrator. In addition, multiple sites can be established, with professionals designated as site administrators to manage site level data. Different surveys can be assigned to each site, for greater flexibility in measuring health outcomes for a given population or program. Professionals can perform varied data management functions as established by the level of access assigned to the professional account, within the designated site(s).

The screenshot displays the QualityMetric PRO Insight login interface. At the top left is the QualityMetric logo with the tagline "PRO Insight Smart Measurement System". A language dropdown menu is set to "English". The page is divided into two main login sections:

- Members:** Includes a link for "Individuals, Members, Patients and Subjects logging in to take a survey". It features a "Login Name" field, a "Password" field, and a "Login" button. Below the fields are links for "Register Now", "Forgot Password?", and "Forgot Login Name?".
- Professionals:** Includes a link for "Providers, Administrators and other Health Care Professionals". It features a "Login Name" field, a "Password" field, and a "Login" button. Below the fields are links for "About PRO Insight", "Forgot Password?", and "Forgot Login Name?".

At the bottom of the page, a footer contains the copyright notice "© 2021 QualityMetric Inc. All Rights Reserved." and links for "PRIVACY" and "CONTACT US".

MEMBER REGISTRATION

We recommend that you establish a member registration process. A staff person in your office can register members using the professional data management functions accessible through the www.amlhealthy.com **Professional** access (right side) portal or can direct members to register themselves online through the www.amlhealthy.com **Members** access portal.

The screenshot shows the QualityMetric PRO Insight login interface. At the top left is the QualityMetric logo and 'PRO Insight Smart Measurement System'. At the top right is a language dropdown set to 'English'. The main content area is split into two columns. The left column, titled 'Members', is highlighted with a red box and contains a 'Login Name' field, a 'Password' field, a 'Login' button, and links for 'Register Now', 'Forgot Password?', and 'Forgot Login Name?'. The right column, titled 'Professionals', contains a 'Login Name' field, a 'Password' field, a 'Login' button, and links for 'About PRO Insight', 'Forgot Password?', and 'Forgot Login Name?'. The footer is a dark bar with the text '© 2021 QualityMetric Inc. All Rights Reserved. PRIVACY CONTACT US'.

Note: If members complete the registration themselves, each member must enter the designated **Site Name** during member registration in order for the data to be linked appropriately to the site within your established group account.

COMPLETING A SURVEY ONLINE

After member registration, surveys may be taken online at www.amlhealthy.com. Each registered member has an individualized Survey page allowing access to the surveys purchased under the group account and assigned to the associated site. Members can Take a Survey and review their resulting member report. Members have access at anytime to their member report history by clicking History and can be encouraged to bring the reports to the office visit to discuss treatment progress.

REPORTS AVAILABLE

PRO Insight provides Member Reports and Provider Reports. Professionals have access to additional reports using PRO Analytics. They allow the professional to

monitoring a group or site. Tabled data reports allow the professional to download results for further analyses.

USING PRO INSIGHT

Once you have purchased PRO Insight, go to www.amlhealthy.com to access the service, establish additional sites, associate professionals and surveys, and manage data. The login name and password established during your purchase will serve as your professional login. This information was sent to you in e-mail after purchasing PRO Insight.

YOUR STAFF ROLE

You and your staff play an essential role in ensuring that the surveys convey an accurate picture of how a member perceives his or her health. Your beliefs and attitudes about the use of the survey convey important messages to the member that may affect his or her responses.

You or designated staff can access the www.amlhealthy.com Professionals portal and register a member online. If member registration is completed through the Professionals portal, the professional may need to assign the member to the appropriate site within the group if the professional has access to more than one site within the group.

Completing member registration in this manner may simplify member instructions otherwise needed for registration. You can instruct the member to use the “login name” and “password” determined by you as part of the registration. A unique identifier can also be assigned to each member account for an added level of confidentiality. The unique identifier can be your identifiable link between the member data and the group account, and should not be modified unless correcting an error in recording.

The member may be instructed to complete self-registration online through the www.amlhealthy.com Members portal. After a member has been registered, the member can login to Members portal and take the survey online.

MEMBER RECRUITMENT TIPS

- When scheduling an appointment, inform members that the survey must be completed as part of the initial assessment.
- Incorporate the use of the survey into the daily routine, clinical encounters and treatment protocols.
- Treat the survey as an integral part of everyday business, not as an extra task.

- Inform members that the survey is more than just a special project or study.
- Ask the member to complete the survey online if possible or send a paper copy to the member for completion in advance of the visit (if a fixed-length questionnaire). Paper surveys may be used to key in the responses to a web form.
- A consistent routine within a site will help ensure the success of your program.

We recommend that the office staff complete registration to ensure appropriate enrollment. However, if members are instructed to complete their own registration, your Site Name is a key piece of information needed for this process. If your member does not designate your Site Name during member registration, you will not be able to track your member results. After completing the member registration process, the member can take the survey online from their individualized Health Survey page.

APPENDIX A – RESERVED NAMES

The following reserved item names can not be used as a variable when using the Configure Survey feature. Following this lists are reserved names for specific surveys.

Reserved Item Names		
ActiveState	HeardID	ObjectTypeID
Address1	HomePhone	PaperReminderFlag
Address2	HT	Password
AdminModelID	ICFDate	PasswordHash
Age	Initials	PasswordLastUpdated
AuxiliaryID	IVRReminderFlag	ProfessionalID
CellPhone	Keyword	ProgramSurveyID
City	LanguageCode	RandomizationNumber
CountryID	LastName	ReferringURL
DateTimeStamp	LastUpdatedDateTime	Salt
DaytimePhone	Locked	ScoringNormingSampleID
DeliveryMethodID	LoginName	ScreeningDate
DOB	MDEMethod	ScreeningNumber
EDCStatusDate	MemberID	SessionID
EDCStatusID	MH01	SessionType
EDCStatusOther	MH02	SponsorID
Email	MH03	StartDateTime
EmailReminderFlag	MH04	State
EndDateTime	MH05	SurveyAdminDate
EnrollmentDate	MHEnhancedScore	SurveyID
FirstName	MiddleName	SurveyQuestionSetupID
Gender	MustChange	TextReminderFlag
GroupID	ObjectID	TimepointLabel
		Zip

RESERVED FOR SF-6Dv2

These are additional item names that are reserved for SF-6Dv2 survey.

Reserved Item Names for SF-6Dv2		
SurveyID	RFG	MHG
SessionID	BPG	SurveyCompleted
MemberID	VTG	ScoringCompleted
PFG	SFG	DateTimeStamp

RESERVED FOR SF-8

These are additional item names that are reserved for SF-8 survey.

Reserved Item Names for SF-8		
SurveyID	RE	MH8
SessionID	MH	PCS8
MemberID	PF8	MCS8
PF	RP8	SurveyCompleted
RP	BP8	ScoringCompleted
BP	GH8	DateTimeStamp
GH	VT8	MCS
VT	SF8	PCS
SF	RE8	

RESERVED FOR SF-10

These are additional item names that are reserved for SF-10 survey.

SurveyID	PFBEND	BEGLOBAL
SessionID	RPKIND	PHSScore
MemberID	REBKIND	PSSScore
Age	BPGLOBAL	SurveyCompleted
Gender	SEFRIEND	ScoringCompleted
GHGLOBAL	SEOVERAL	DateTimeStamp
PFSOME	MHUPSET	

RESERVED FOR SF-12V2

These are additional item names that are reserved for SF-12v2 survey.

Reserved Item Names for SF-12v2		
SurveyID	MH03	ScoringCompleted
SessionID	MH04	DateTimeStamp
MemberID	PFScore	GH
PF02	RPScore	PF
PF04	BPScore	RP
RP02	GHScore	BP
RP03	VTscore	VT
BP02	SFScore	SF
GH01	REScore	MH
VT02	MHScore	RE
SF02	PCSScore	MCS
RE02	MCSScore	PCS
RE03	SurveyCompleted	SF6D_R2

RESERVED FOR SF-36V2

These are additional item names that are reserved for SF-36v2 survey.

Reserved Item Names for SF-36v2		
SurveyID	RP04	GH03
SessionID	RE01	GH04
MemberID	RE02	GH05
GH01	RE03	PF
HT	SF01	RP
PF01	BP01	BP
PF02	BP02	GH
PF03	VT01	VT
PF04	MH01	SF
PF05	MH02	RE
PF06	MH03	MH
PF07	VT02	PCS
PF08	MH04	MCS
PF09	VT03	SurveyCompleted

Reserved Item Names for SF-36v2		
PF10	MH05	ScoringCompleted
RP01	VT04	DateTimeStamp
RP02	SF02	SF6D_R2
RP03	GH02	

RESERVED FOR CHAI

These are additional item names that are reserved for CHAI survey.

Reserved Item Names for CHAI		
SurveyID	CHAI4	CHAI10
SessionID	CHAI5	CHAI_SCORE
MemberID	CHAI6	CHAI_ACTIVATION_LEVEL
CHAI1	CHAI7	SurveyCompleted
CHAI2	CHAI8	ScoringCompleted
CHAI3	CHAI9	DateTimeStamp

RESERVED FOR PHQ-9

These are additional item names that are reserved for PHQ-9 survey.

Reserved Item Names for PHQ-9		
SurveyID	PHQ9_4	PHQ9_10
SessionID	PHQ9_5	PHQ9_Score
MemberID	PHQ9_6	PHQ9_DEPRESSION_SEVERITY
PHQ9_1	PHQ9_7	SurveyCompleted
PHQ9_2	PHQ9_8	ScoringCompleted
PHQ9_3	PHQ9_9	DateTimeStamp

RESERVED FOR PIQ-6 ADD-ON (PAIN ENHANCED)

These are additional item names that are reserved for surveys with PIQ-6 add-on (Pain Enhanced)..

Reserved Item Names for PIQ-6 Add-on		
SurveyID	FPain4	ScoringCompleted
SessionID	FPain5	DateTimeStamp
MemberID	FPain6	PI_SUM
FPain1	PainImpactSumScore	PI_WML
FPain2	PainImpactWMLScore	
FPain3	SurveyCompleted	

RESERVED FOR MEDICAL EXPENDITURE ADD-ONS

These are additional item names that are reserved for surveys with Medical Expenditure add-on.

Basic/Standard Reporting

Reserved Item Names for Medical Expenditure Basic Reporting		
MedicalExpenditure		

Advanced Reporting

Reserved Item Names for Medical Expenditure Advanced Reporting		
CCE	CCN	MedicalExpenditure

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