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Chapter 1 About PRO Insight

Amplifying the patient’s voice in health care, Optum’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.

Chapter 6  Index for quick search on topics.
Chapter 2 Data Collection

PRO Insight is part of Optum’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 score 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.

- **Scoring API**
  The PRO Insight Scoring Libraries are installed on the companies server and the company writes applications to score their data in house.

Discuss your company’s needs with your Optum Account Executive to determine which mode of delivery is best for you.
The Optum 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)

<table>
<thead>
<tr>
<th>Survey Names (as displayed in PRO Insight)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SF-8</td>
</tr>
<tr>
<td>SF-8™ Health Survey</td>
</tr>
<tr>
<td>SF-10</td>
</tr>
<tr>
<td>SF-10™ Health Survey for Children</td>
</tr>
<tr>
<td>SF-10™ Health Survey for Children (Spanish)</td>
</tr>
<tr>
<td>SF-12v2</td>
</tr>
<tr>
<td>SF-12v2® Health Survey</td>
</tr>
<tr>
<td>SF-12v2® Health Survey Acute Version</td>
</tr>
<tr>
<td>SF-12v2® Health Survey (HTML report)</td>
</tr>
<tr>
<td>SF-12v2® Health Survey (Spanish)</td>
</tr>
<tr>
<td>SF-12v2® Health Survey (Advanced Reporting)</td>
</tr>
<tr>
<td>SF-12v2® Health Survey (Basic Reporting)</td>
</tr>
<tr>
<td>SF-12v2® Health Survey MH Enhanced with ME (Standard Reporting)</td>
</tr>
<tr>
<td>SF-12v2® Health Survey MH Enhanced with ME (Advanced Reporting)</td>
</tr>
<tr>
<td>SF-12v2® Health Survey MH Enhanced</td>
</tr>
<tr>
<td>SF-12v2® Health Survey MH and SET Enhanced</td>
</tr>
<tr>
<td>SF-12v2® Health Survey MH Enhanced (Spanish)</td>
</tr>
<tr>
<td>SF-12v2® Health Survey with PIQ-6</td>
</tr>
<tr>
<td>SF-12v2® Health Survey MH Enhanced with PHQ-9</td>
</tr>
<tr>
<td>SF-12v2® Health Survey with PHQ-9</td>
</tr>
<tr>
<td>SF-12v2 Single Item Forms</td>
</tr>
<tr>
<td>SF-12v2® Health Survey</td>
</tr>
<tr>
<td>Survey Names (as displayed in PRO Insight)</td>
</tr>
<tr>
<td>------------------------------------------</td>
</tr>
<tr>
<td>SF-12v2® Health Survey - SET</td>
</tr>
<tr>
<td>SF-12v2® Health Survey - MH Enhanced</td>
</tr>
<tr>
<td>SF-12v2® Health Survey - MH and SET</td>
</tr>
<tr>
<td>SF-12v2® Health Survey w/ PIQ-6</td>
</tr>
<tr>
<td>VR-12</td>
</tr>
<tr>
<td>SF-12v2® Cross Calibrated Scores</td>
</tr>
<tr>
<td>SF-36v2</td>
</tr>
<tr>
<td>SF-36v2® Health Survey Standard Version</td>
</tr>
<tr>
<td>SF-36v2® Health Survey Acute</td>
</tr>
<tr>
<td>SF-36v2® (Provider report only - No Member report)</td>
</tr>
<tr>
<td>SF-36v2® Acute (Provider report only - No Member report)</td>
</tr>
<tr>
<td>SF-36v2® Health Survey Standard Version (Advanced Reporting)</td>
</tr>
<tr>
<td>SF-36v2® Health Survey Standard Version (Basic Reporting)</td>
</tr>
<tr>
<td>SF-36v2® Health Survey MH Enhanced with ME (Basic Reporting)</td>
</tr>
<tr>
<td>SF-36v2® Health Survey MH Enhanced with ME (Advanced Reporting)</td>
</tr>
<tr>
<td>SF-36v2® Health Survey with PIQ-6™</td>
</tr>
<tr>
<td>SF-36v2 Single Item Forms</td>
</tr>
<tr>
<td>SF-36v2® Health Survey Standard Version</td>
</tr>
<tr>
<td>SF-36v2® Health Survey with PIQ-6™</td>
</tr>
<tr>
<td>VR-36</td>
</tr>
<tr>
<td>SF-36v2® Cross Calibrated Scores</td>
</tr>
<tr>
<td>Asthma Control Test</td>
</tr>
<tr>
<td>Asthma Control Test</td>
</tr>
<tr>
<td>ACT™</td>
</tr>
<tr>
<td>Asthma Impact Survey</td>
</tr>
<tr>
<td>Asthma Impact Survey (AIS6)</td>
</tr>
<tr>
<td>Brief Fatigue Inventory</td>
</tr>
</tbody>
</table>
### Survey Names (as displayed in PRO Insight)

<table>
<thead>
<tr>
<th>Survey Name</th>
<th>Copyright Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brief Fatigue Inventory (BFI)</td>
<td></td>
</tr>
<tr>
<td>CHAI</td>
<td></td>
</tr>
<tr>
<td>Consumer Health Activation Index™ (CHAI™)</td>
<td></td>
</tr>
<tr>
<td>CHI</td>
<td></td>
</tr>
<tr>
<td>Consumer Health Inventory™ (CHI™)</td>
<td></td>
</tr>
<tr>
<td>Headache Impact Survey</td>
<td></td>
</tr>
<tr>
<td>HIT-6</td>
<td></td>
</tr>
<tr>
<td>MOS Sleep</td>
<td></td>
</tr>
<tr>
<td>MOS 6-Item Sleep-Revised 2010: United States (English)¹</td>
<td></td>
</tr>
<tr>
<td>MOS 12-Item Sleep-Revised 2010: United States (English)²</td>
<td></td>
</tr>
<tr>
<td>Patient Health Questionnaire</td>
<td></td>
</tr>
<tr>
<td>PHQ-9³</td>
<td></td>
</tr>
<tr>
<td>Pain Impact Questionnaire</td>
<td></td>
</tr>
<tr>
<td>PIQ-6™ Pain Impact Questionnaire</td>
<td></td>
</tr>
<tr>
<td>Rhinitis Impact Survey</td>
<td></td>
</tr>
<tr>
<td>RIS-6™</td>
<td></td>
</tr>
</tbody>
</table>

### 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.

---

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.
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 Optum Account Executive.

Custom Surveys

PRO Insight can also be used for data capture on custom surveys. The Optum 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://campaign.optum.com/optum-outcomes/contact-us.html or complete Optum’s Survey Request Form at https://campaign.optum.com/optum-outcomes/survey-request-form.html.

Licensing PRO Insight

To license PRO Insight for an upcoming study/program, please contact your Optum Account Executive.

If you don’t have an Account Executive:
    Refer to the Optum website:
    https://campaign.optum.com/optum-outcomes/contact-us.html

    Or, submit an online license request form:

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 additional 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 Optum Account Executive (or use the links above).

Purchasing Surveys and Survey Credits

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

Getting Started

Upon licensing PRO Insight for collection of Optum’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.

Aggregate Report Viewer Professional

The Aggregate Report Viewer Professional has a level of access allowing generation of Aggregate Reports. No member level data is accessible.

Professional Level of Access Privileges

<table>
<thead>
<tr>
<th>Action</th>
<th>Group Administrator</th>
<th>Site Administrator</th>
<th>Full Access Professional</th>
<th>Data Entry Professional</th>
<th>Aggregate Report Professional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Log-in to the PRO Insight at <a href="http://www.amihealthy.com">www.amihealthy.com</a></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>View aggregate reports (Overall, Gender and Age)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Advanced Reporting: PRO Analytics</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Register new members</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Assign Members to Sites</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Modify members’ information (name, email, address, etc.)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Configure additional survey questions</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter survey data</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Edit survey data</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Member and Provider reports</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Modify survey data</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Tabled Reports of survey data</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Modify status (active/inactive) for members</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Professionals Login

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

1. Go to [www.amIhealthy.com](http://www.amIhealthy.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.
About PRO Insight

**About PRO Insight:** Directs you to Optum’s website which details the Smart Measurement® System suite of products: PRO Insight, PRO Analytics, and PRO CoRE. [https://campaign.optum.com/optum-outcomes/what-we-do/smart-measurement-system.html](https://campaign.optum.com/optum-outcomes/what-we-do/smart-measurement-system.html)

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.
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.

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

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.
Tools

The Tools tab will display for certain levels of access. The typical group set up shows “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.
Reports

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

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.
Administration Management Functions

Administrative functions are available by clicking the Administration tab at the top of the screen. The screens are easy to use and there are instructions available through a help key as needed to complete the desired activity.

Update your 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.
Update your Password

You can update your password from this screen.

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:

- 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

Username:  JConley

*Current Password: 

*New Password: 

*Confirm New Password: 

Update Password  Cancel
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 Survey, delivery Mode, Survey Credits purchased, the Date of Purchase and Additional Notes from the set up.

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.
Administering Sites

Register New Site

1. From the Administration tab, click Administer Sites :

2. Click the link for “Register New Site”.

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

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

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.

Administer Professionals

Register a New Professional

Group Administers and Site Administers 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.

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.
Edit Professional

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

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

3. Complete the registration form.
4. 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.

5. 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.
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.
Finding and Administering Members

After you have successfully logged into PRO Insight amIhealthy.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 amIhealthy.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 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 Summary

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

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.

![Member Search Results](image)

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.

![Delete Member](image)
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.

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

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

**View Member and Provider Reports**

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

**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 Optum 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**.
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.

In the example on the next page, by comparing the member's score to others in the Arthritis population, the member's Physical Health Summary and Mental Health Summary show “Your current score indicates that you are same or better than an arthritis population of similar age and gender”.

Physical Health Summary and Mental Health Summary compared to the Arthritis 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 Optum 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

<table>
<thead>
<tr>
<th>Physical Health Progress</th>
<th>Mental Health Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
<td><strong>Score</strong></td>
</tr>
<tr>
<td>Current: Sep 22, 2017</td>
<td>46</td>
</tr>
<tr>
<td>Previous: Jan 18, 2017</td>
<td>47</td>
</tr>
</tbody>
</table>

Your score is about the same as your previous survey.

### Survey Responses

<table>
<thead>
<tr>
<th>Physical Health</th>
<th>Previous</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limited in activities, such as moving a table, pushing a vacuum cleaner, bowling, or playing golf</td>
<td>Yes, limited a little</td>
<td>Yes, limited a little</td>
</tr>
<tr>
<td>Limited in climbing several flights of stairs</td>
<td>Yes, limited a little</td>
<td>Yes, limited a little</td>
</tr>
<tr>
<td>Accomplished less than you would like</td>
<td>A little of the time</td>
<td>A little of the time</td>
</tr>
<tr>
<td>Limited in the kind of work or other activities</td>
<td>A little of the time</td>
<td>A little of the time</td>
</tr>
<tr>
<td>Extent pain interfered with normal work</td>
<td>A little bit</td>
<td>A little bit</td>
</tr>
<tr>
<td>Overall health: excellent, very good, good, fair, or poor</td>
<td>Good</td>
<td>Good</td>
</tr>
</tbody>
</table>

### Mental Health Impact

#### Your Score

Your score shows your mental health impact to be minimal.

### Survey Responses

<table>
<thead>
<tr>
<th>Mental Health Impact</th>
<th>Previous</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Felt very nervous</td>
<td>A little of the time</td>
<td>A little of the time</td>
</tr>
<tr>
<td>Felt down in the dumps</td>
<td>A little of the time</td>
<td>A little of the time</td>
</tr>
<tr>
<td>Felt calm and peaceful</td>
<td>A little of the time</td>
<td>A little of the time</td>
</tr>
<tr>
<td>Felt overwhelmed and depressed</td>
<td>Most of the time</td>
<td>Some of the time</td>
</tr>
<tr>
<td>Felt happy</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Followed by **Mental Health Impact** and **Survey Responses**.
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 the example on the next page, by comparing the member’s score to others in the Arthritis population, the member’s Physical Health Summary and Mental Health Summary show “Your current score indicates that you are same or better than an arthritis population 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.

For the complete list of benchmarks available to purchase, contact your Optum Account Executive.
Printing a Report

1. From the Survey Results pane, identify the survey by Survey, Survey Date and Timepoint columns. In the Actions column in the Survey Results grid, click on either “View Member Report” link to view a Member Print report or “View Provider Report” link.

![Survey Results Table]

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

![Provider Report]

3. 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.

4. 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 Optum Account Executive
- Survey Date, Timepoint and Site can be edited for all surveys.
- Editing of Survey Responses is available on the SF-8, SF-12v2, SF-36v2, BFI, 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.
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.
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-8, SF-12v2, SF-36v2, BFI, 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 Table]

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 Screen]
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 prerequisite 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-8™ Health Survey, SF-12v2 Health Survey variations, SF-36v2 Health Survey variations, Brief Fatigue Inventory (BFI), 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.
  
  o 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.

  o 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. The next screen shows what you selected on the Setup screen. To edit the setup, select the “Edit Setup” button. Select the “Add Question” button to begin configuring your question(s).
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.

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

Preview Additional Questions

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

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.
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.
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.

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 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.

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, Email Template from the dropdown, and Email Subject (default is Reminder to take your survey).
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

When you Register a New Member, check the Email Reminder box found below "Keyword".
If the member is already set up in the site, the member's email checkbox can be found under Edit Member and then Update Member's Information.

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 checkbox must be checked. The Reminder Settings are found under Edit Member, then Update Member's Reminder Settings.
Opting Out

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, 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.**
Reminder Emails:  
Every email sent will have a one click opt-out link at the bottom.

View Schedules and Reminders

To view the schedules and reminders, select View Schedules and Reminders from the TOOLS tab.
The list of Schedules for the Site will display. If there is more than one site, select the site from the dropdown menu.

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.

You can change the Schedule reminder by selecting Edit. The Edit Schedule and Reminders page appears displaying the details.
Reminder Report

To view the Reminder Report, select [Reminder Report].
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.

**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 Auxiliary ID: Allows you to narrow your search to a specific Member auxiliary ID.


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

Create New Alert

To create a new alert, select Create New Alert.

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.

**View Alert**

To view Alerts that have been previously set up, select **View Alert**.
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.

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
- Behavioral Health Site (BHSITE)
- Lincoln Clinic (Lincoln)

### Alert
- PCS and RP

### Member Information
- Member User Name:
- Member Auxiliary ID:
- Member Last Name:
- Member First Name:

### Generate Report

---

<table>
<thead>
<tr>
<th>Member</th>
<th>Alert</th>
<th>Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Caudwell, Brian</td>
<td>Alert: PCS and RP</td>
<td>Survey: SF-12v28 Health Survey (Advanced Reporting)</td>
</tr>
<tr>
<td>User Name: BCD710</td>
<td>Alert Date: 07/10/2018</td>
<td>Survey Date: 07/10/2018</td>
</tr>
<tr>
<td>User Name: E0706a</td>
<td>Alert: PCS and RP</td>
<td>Survey: SF-12v28 Health Survey (Advanced Reporting)</td>
</tr>
<tr>
<td>Auxiliary ID: 02/03/1991</td>
<td>Gender: F</td>
<td>Survey Date: 07/06/2018</td>
</tr>
<tr>
<td>User Name:</td>
<td>Alert Date: 07/06/2018</td>
<td>Patient Report: View Report</td>
</tr>
<tr>
<td>Auxiliary ID:</td>
<td>Gender: F</td>
<td>Physician Report: View Report</td>
</tr>
</tbody>
</table>
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, Aggregate Reports, 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 HL7, CDISC, web-based (.html), Microsoft Excel (.xls), Comma-separated values (.csv), or comma-delineated text file (.txt) formats.
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 (HL7 2.1 - 6, CDISC 1.1 - 1.3, HTML, Excel, Plain Text).

**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.

The following is an example of a Tabled Report output Format.
Aggregate Reports

Use the Aggregate Reports feature to generate a roll-up report of SF- survey administrations within your group or site(s). Narrow the search parameters for the report by making changes to the Report Criteria.

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

- **Report Type:** Select from the dropdown one of the following reports: SF Comparison of Total Sample, Scores by Age Group Report, Scores by Gender Report, Tabular Data Report, and Tabular Report by Timetable.

- **Report Title:** the report title defaults to the same name as the report type above. You can type your own report name and the report will show with that report name when the report is generated.
• **Survey:**  the Survey to be reported on. The SF-survey(s) available for your site. If more than one survey is part of your Group, choose the survey from the dropdown.

• **Group:**  This dropdown defaults to your Group.

• **Site to Include:**  the Site to be included in the search. The default is a checkbox for all Sites. If you have more than one Site and only want to report on one site, highlight that Site.

• **Start Date:**  the Survey Administration starting date to search on.

• **End Date:**  the Survey Administration ending date to search on.

• **Timepoint:**  If Timepoints are set up for your surveys, you can select specific timepoints from the dropdown menu.

• **Report sample to include:**  the dropdown allows you to choose: All Surveys Taken, Only the Most Recent Survey Taken, and Only the First/Baseline Survey Taken

• **Members’ Active State:**  Use the dropdown to select to search Active and Inactive, Active Only, and Inactive Only members.

• **Comments:**  This a a freeform text area for up to a maximum of 500 characters. The Text appears at the top of the report.

The following is an example of an SF-Comparison for Total Sample Report output Format.
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).
<table>
<thead>
<tr>
<th>Audit Event</th>
<th>Who made the change</th>
<th>What was changed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit Trail ID: 3466147</td>
<td>Type: Professional</td>
<td>Type: Member</td>
</tr>
<tr>
<td>Date: 8/16/2017 5:32:04 PM</td>
<td>Id: 74010</td>
<td>Id: 7015021</td>
</tr>
<tr>
<td>Description: Update Member</td>
<td>Description: JConley</td>
<td>Description: emp01232017</td>
</tr>
<tr>
<td>Full Description: Gender</td>
<td></td>
<td>Old Value: M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>New Value: F</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reason for Edit:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Comment:</td>
</tr>
<tr>
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<td>Type: Professional</td>
<td>Type: Professional</td>
</tr>
<tr>
<td>Date: 8/16/2017 5:20:44 PM</td>
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<td>Id: 74010</td>
</tr>
<tr>
<td>Description: Professional Log-in</td>
<td>Description: JConley</td>
<td>Description: JConley</td>
</tr>
<tr>
<td>Full Description: Professional Log-in Successful for Username: 'jconley'</td>
<td></td>
<td>Old Value:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>New Value:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reason for Edit:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Comment:</td>
</tr>
</tbody>
</table>
Chapter 4  PRO Insight for the 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.

Member Registration Steps

Each group practice sets up procedures for registering new members on the 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.amIhealthy.com using the Member portal:

1. Go to www.amIhealthy.com

2. Beneath “Members”, click on the “Register Now” link to register

3. Complete the member registration form. and click submit.
4. Make sure the Site Name is correct before you click submit.

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.
Member Login Steps

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

1. Go to [www.amIhealthy.com](http://www.amIhealthy.com)

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

**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.
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.

All 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.
- **Logout:** On the top right side, click the Logout link to exit PRO Insight.
- **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.
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.

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. An example of a Member Report is shown 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**.
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.

In the example on the next page, by comparing the member’s score to others in the Arthritis population, the member’s **Physical Health Summary** and **Mental Health Summary** show “Your current score indicates that you are **same or better** than an arthritis population of similar age and gender”. 

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

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.

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).

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.amIhealthy.com Professional access (right side) portal or can direct members to register themselves online through the www.amIhealthy.com Members access portal.
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.amIhealthy.com](http://www.amIhealthy.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. There is an aggregate report available for use in 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.amIhealthy.com](http://www.amIhealthy.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.amIhealthy.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.amIhealthy.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.

<table>
<thead>
<tr>
<th>Reserved Item Names</th>
<th>Reserved Item Names</th>
<th>Reserved Item Names</th>
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Reserved for SF-8

These are additional item names that are reserved for SF-8 survey.
### Reserved Item Names for SF-8

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### Reserved for SF-10

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<td>RP</td>
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<td>RP02</td>
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<td>RP03</td>
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### Reserved Item Names for SF-12v2

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

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Reserved for BFI

These are additional item names that are reserved for Brief Fatigue Inventory (BFI) survey.

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<td>BFI_NOW_FATIGUE</td>
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Reserved for CHAI

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

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Reserved for PHQ-9

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

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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).

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Reserved for Medical Expenditure Add-ons

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

**Basic/Standard Reporting**

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**Advanced Reporting**

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