

PERSONAL WELLNESS PROFILE™

# ADMINISTRATOR'S MANUAL



PWP Advantage™  
*for the WellSuite™ Portal*

 **Wellsource®**  
THE WIN-WIN WELLNESS SOLUTION

**PWP ADVANTAGE  
FOR THE  
WELLSUITE™ PORTAL**

**ADMINISTRATOR'S MANUAL**

<b>Edition</b>	<b>Publication Date</b>
First	Sept 17, 2010
Second	Nov 5, 2010

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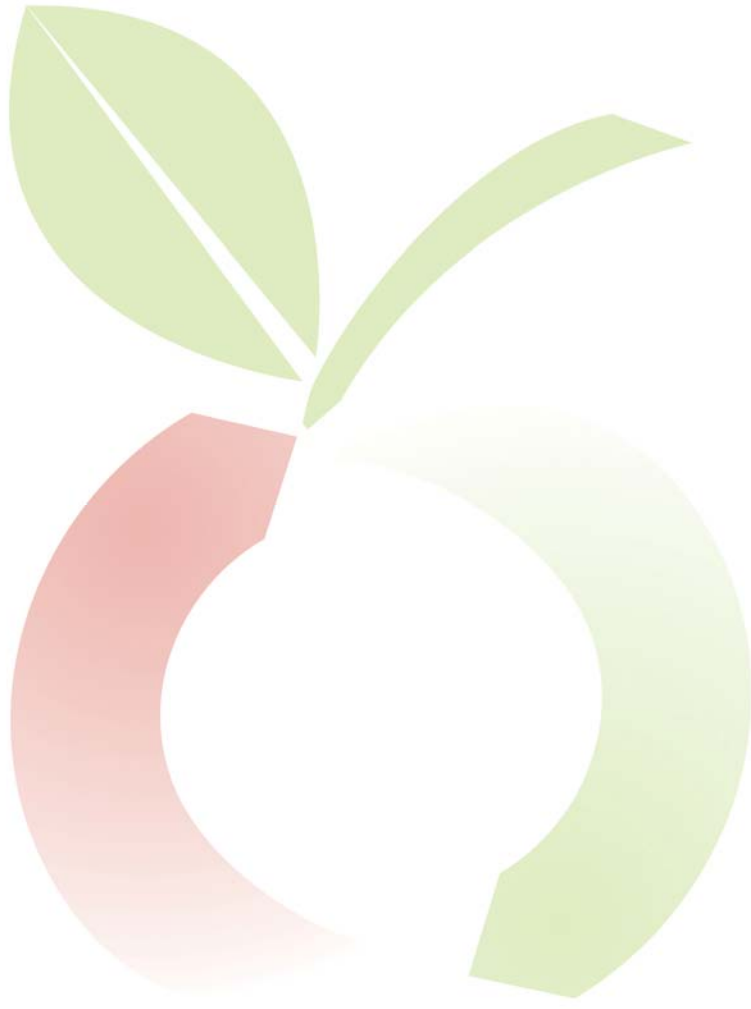
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# INTRODUCTION

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Thank you for purchasing a license to use the Personal Wellness Profile™ Advantage on the Wellsource® WellSuite® Portal. This manual will provide you with step-by-step instructions on how to configure, utilize, and report on activity within the program. If you purchased additional products to reside on the Portal, you will receive separate instructions for their use.

## **Deployment**

Wellsource created a URL for your WellSuite Portal and sent it to you along with login, setup, and deployment instructions. This URL provides access to all products you have added to your Portal. Once you accept the Terms and Conditions of each product's license on your Portal, your programs will be ready to configure.

## **Getting Started**

Take time to decide how you would like to configure PWP Advantage. Think about the following items, and how they fit in with your main goal in utilizing the Portal for your health and wellness program.

## **Participant Configuration**

- Do you want your participants to self-register in the program, or do you want to pre-register all participants prior to deployment?
- How are you going to categorize participants? By Department? Cost Center? Region?
- Do you want to require your participants to enter personal information?
- If so, what personal information will you require?

## **Login**

Enter the Administrator User ID and Password that was supplied to you. You will immediately be prompted to change the User ID and Password. Once you change these you will be directed to the Admin login page.

## **Admin Login Page**

The Admin login page is broken down into three sections: *Your Product List*, *How to Use the Program*, and *What's New*.

**Your Product List:** This area shows the products you have purchased for your Portal.

You may notice that some of the options are light grey and are not underlined. This simply means that no Administration is needed on these sections.

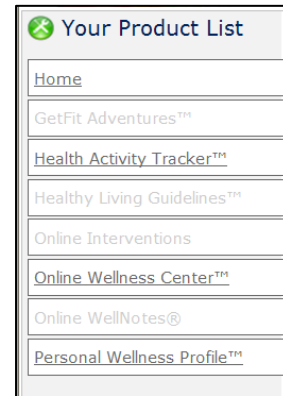


Figure 1: Product List

### Welcome / How to Use the Program:

This section has tips and pointers which will help you navigate through the program.

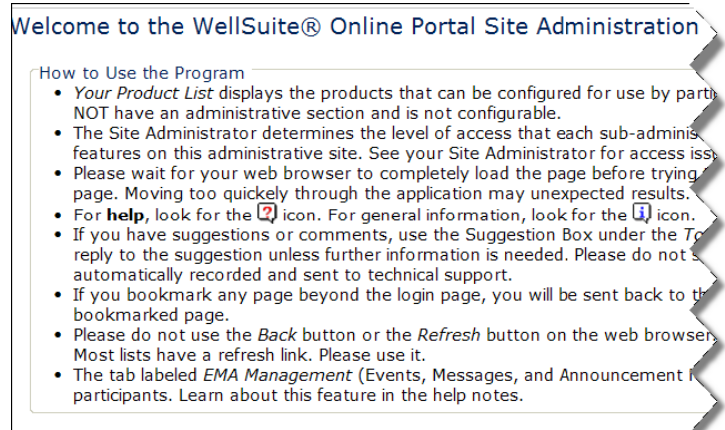


Figure 2: Welcome / How to Use

**What's New:** This section shows updated news on enhancements added to the Portal.

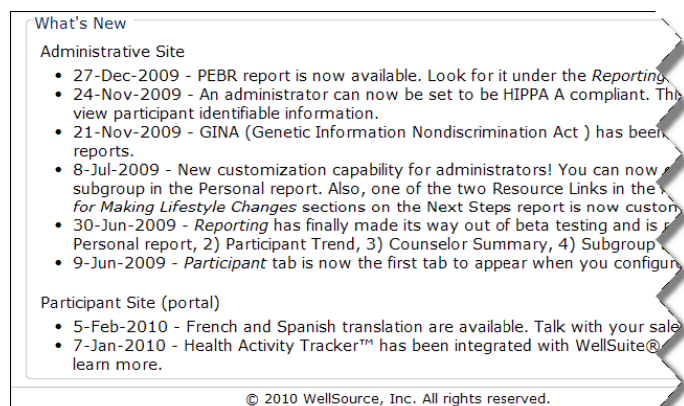


Figure 3: What's New




## Personal Wellness Profile™ (PWP)


To manage your subgroups or configure your PWP Advantage program, click the Personal Wellness Profile™ hyperlink in your “Your Product List.” You will be taken to the Subgroup Management page.

**Your Product List:** This area shows what products you have purchased that are available on your Portal. See Figure 1.

## Understanding the Icon Key

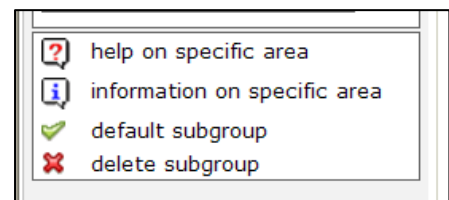
Within each page of the PWP Advantage Admin Portal, you will see an explanation key under your product list. This will define what the different icons on the page mean. The items in this section will change to reflect the different functions available on each page.

**Help Button:** Click the  icon to find online help for a specific area.

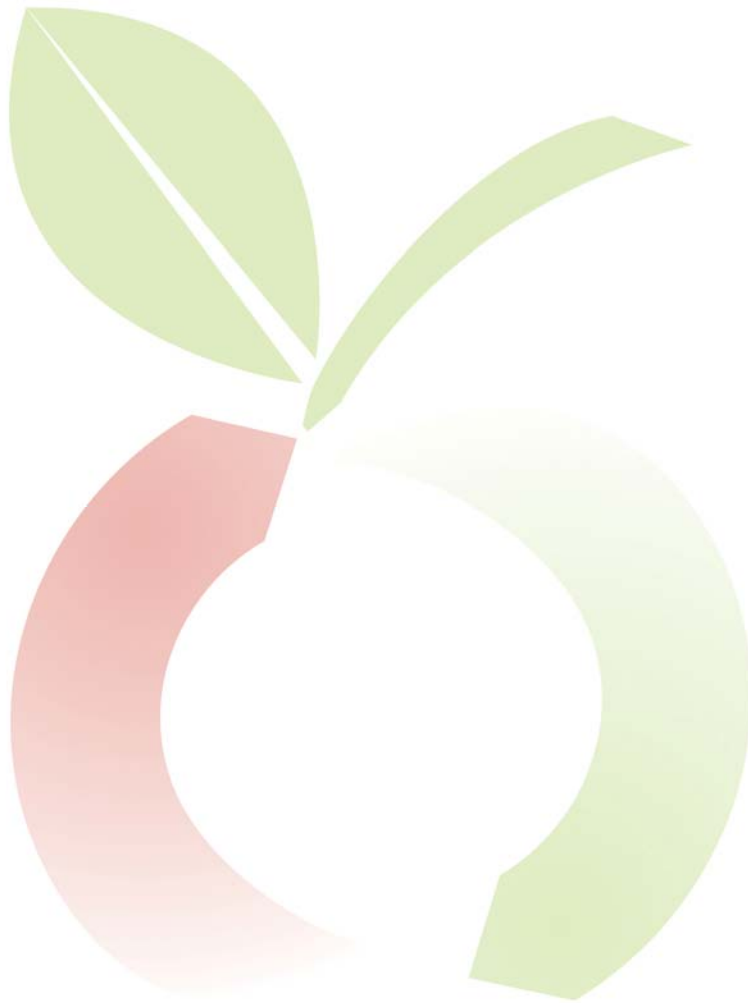
**Information Button:** Click the  icon to see more information on how to utilize the section you are in.

**Green Checkmark:** This icon indicates the default subgroup.

**Red X:** Click this icon to delete the subgroup.



**Figure 4: The Icon Key**



# SUBGROUP MANAGEMENT

## Groups

This area is for clients who have purchased extra Vertical Enterprise Units (VEUs) for their Portal. A VEU will allow you to have more than one customer on your Portal, and will allow you to brand and configure each “parent” group differently. For more information on VEUs, please contact your Sales Representative.



Figure 5: Group Selector

## Subgroups

In this section, you may change your default subgroup, create a new subgroup, or configure a subgroup. This section also allows you to break your participants up by category. You may categorize them however you choose: by city, state, department, or region. If you allow your participants to self-register on your site, you **MUST** give them the full “grid” URL as the site address, or they will not see the self-registration section. “Grid” stands for “Group ID.”

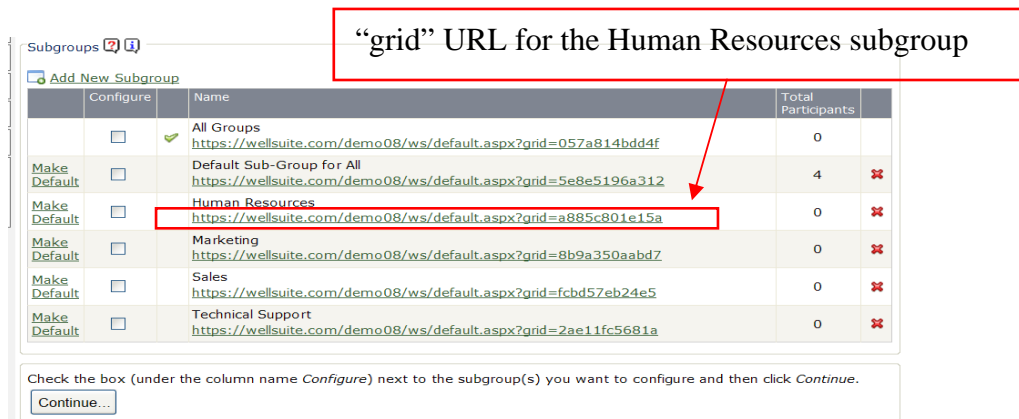


Figure 6: Subgroup Selector

## Adding a New Subgroup

When you first get your PWP Advantage, you will have one default subgroup for your Portal.

1. Click **Add New Subgroup**.
2. Type in the name of your new subgroup, according to instructions.
3. Click **Add Subgroup**.
4. You will be taken back to the Subgroups screen. You now have a new subgroup, with a distinct URL for that particular subgroup.

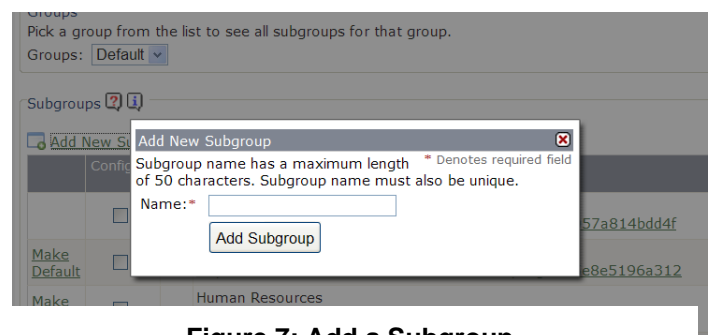


Figure 7: Add a Subgroup

Your new subgroup will contain all settings that are within your default subgroup, with the exception of:

- Banner File
- Assessment Frequency
- Bio Updates
- Announcements
- Events/Tasks

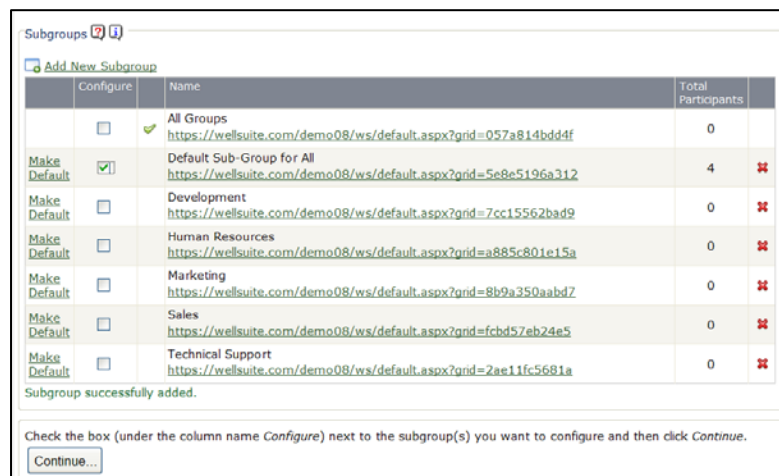
**NOTE:** If you configure a subgroup for a group of participants and you want them to be able to self-register, you *must* give them the “grid” URL specific to their subgroup.

## Configuring a Subgroup

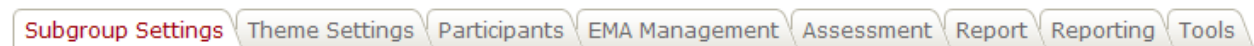
To configure a subgroup or add a participant to a subgroup, select (check) the box next to the subgroup you would like to change. To configure multiple subgroups, click the box next to the subgroups you want to change. Keep in mind, any configuration changes you make will be made to all subgroups selected.

**NOTE:** Events, Tasks, and Announcements will NOT be configured for all subgroups at the same time. You must enter these items in each individual subgroup.

1. Select the box next to the subgroup(s) name
2. Click **Continue**
3. You will see eight different tabs across the top of the page:



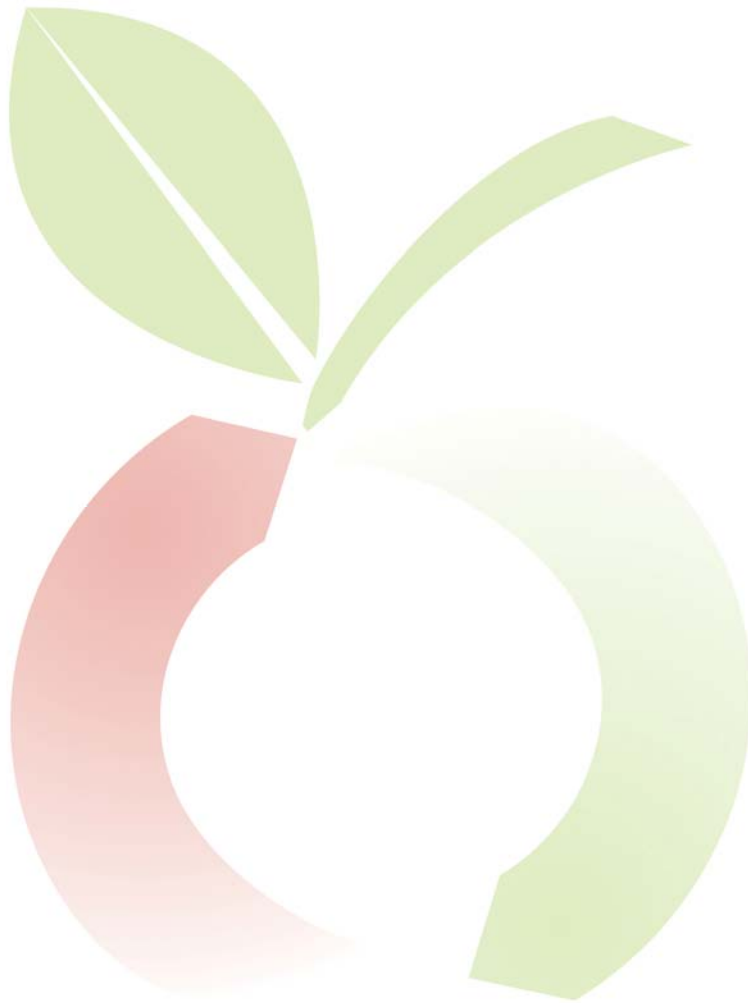
**Figure 8: Select a Subgroup**



**Figure 9: The main program tabs**

In the remaining sections of this manual, we will describe each of the eight main program tabs, their sub-tabs, and how each function is used.

<b>Subgroup Settings</b> .....	Page 9
<b>Theme Settings</b> .....	Page 15
<b>Participants</b> .....	Page 21
<b>EMA Management</b> .....	Page 42
<b>Assessment</b> .....	Page 49
<b>Report</b> .....	Page 56
<b>Reporting</b> .....	Page 63
<b>Tools</b> .....	Page 84



## SUBGROUP SETTINGS TAB

This tab has seven different sections:

1. Startup and Login Control
2. Demographic Control
3. Product Control
4. Password Control
5. Site Control
6. Permission Control
7. Portal Area Control

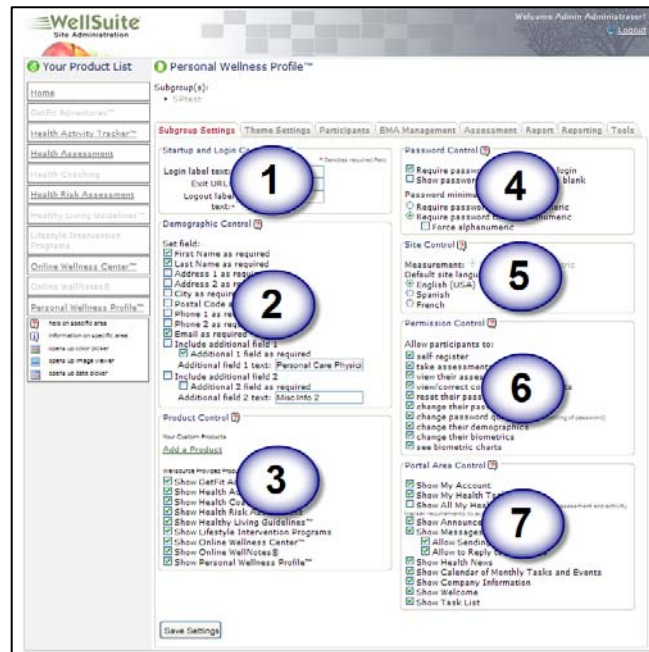


Figure 10: The Subgroup Settings tab

### Startup and Login Control

**Login Label Text:** This box allows you to choose what the participants in this subgroup see when logging in to the Portal. For example, you might choose to label this “User Name,” “Employee ID,” or something else that works for you.

Figure 11: Startup & Login Control

**Exit URL:** This allows you to direct your participants for this subgroup to an outside website when they log out of the program. In this instance, we have chosen to use [www.wellsource.com](http://www.wellsource.com). You may wish to use your company’s Home page in this section.

**Logout Label Text:** This box enables you to change the wording of the logout hyperlink to something else, such as “Sign Out” or “Exit.”

Once you have made your appropriate changes, click **Save Settings** at the bottom of the screen.

### Demographic Control

At the start of this manual, we asked you to think about what information you would like to require for a participant to gain access to the Portal. This section is where you determine what information a participant must provide in order to register.

Simply select which items you wish to require:

- First Name
- Last Name
- Address 1
- Address 2
- City
- Postal Code
- Phone 1
- Phone 2
- Email required
- Include additional field 1 – If you select this box, you will be able to add an additional field. If additional field required is checked, that field will be required. Additional field text assigns a title for the additional field. Perhaps you would like to require participants to enter their employee ID number or SSN.
  - Click to select both the **Include** and **Required** check boxes, and then rename the field in the additional field text box.
- Include additional field 2 – Same as additional field 1.

Figure 12: Demographic Control

Once you have made your appropriate change(s), click **Save Settings** at the bottom of the screen.

## Product Control

This section allows you to determine which products your current group will be allowed to access. Only products licensed to you will appear on this list.

You may also add a custom product to this section.

Figure 13: Product Control



## Adding a Custom Product

1. Click [Add a Product](#).
2. Create a name for the product.
3. Add the URL to direct participants to the product.
4. Click **Submit**.

Figure 14: Add/Edit a Custom Product

## Password Control

### **Require password change at next login:**

You may want to require a participant to create a new password upon next login, if an administrator assigned them a password.

### **Show password reset if question is blank:**

When a participant registers in the program, he is asked a security question such as, “What is your mother’s maiden name?” If the participant didn’t answer it upon registration, you may require it at next login.

Figure 15: Password Control Options

**Password minimum length:** You may require anywhere from 4 character passwords, up to 12 character passwords. Longer passwords are inherently stronger, but may be harder for your participants to remember.

**Require password to be only numeric:** Select this if you want your participants’ passwords to contain *only* numbers.

Not Acceptable: **Abc123**

Not Acceptable: **Abcdef**

Acceptable: **123456**

**Require password to be alphanumeric:** Select this if you will allow your participants to use both letters and numbers in their password. This is the most flexible setting.

Acceptable: **Abc123**

Acceptable: **Abcdef**

Acceptable: **123456**

**Force alphanumeric:** Select this box if you want to make it mandatory for your participants’ passwords to contain both letters and numbers. This is the most secure setting.

Acceptable: **Abc123**

Not Acceptable: **Abcdef**

Not Acceptable: **123456**

## Site Control

**Measurement:** Choose the type of measurement (Standard or Metric) that is used for calculations and for when the participant is picking values. This value can only be set once and only during the initial setup. After that, it is grayed out.

**Figure 16: Site Control initial view**

**Default site language:** Choose the default language for the site, should the participant not select a different language. (This only applies to sites that have purchased additional language options.)

## Permission Control

In this section, you will choose what you will allow your participants to view or complete within the program.

**Self-register:** If you wish to allow your participants the ability to register themselves in the program, select this box.

**Take assessments:** Select this box if you want your participants to be able to take an assessment. For example, if you have a wellness program that requires your participants to take a Health Risk Assessment (HRA) every 6 months, you may want to uncheck this box until it is time for your next wellness fair.

**View their assessment reports:** If you want a health coach to go over your participants' assessment results with them, you may want to uncheck this box. It will allow your participants to take the assessment; however there will be no report for them to view when it is complete. Only your administrator or designated coach may print the report for the participant.

**View/Correct completed assessments:** If you select this box, you will allow your participants to view their previous assessments, and make changes to their completed assessments.

**Reset their password:** This will allow participants to request a password to be reset if they have forgotten their password upon login by answering their change password question successfully.

**Change their password:** This will allow participants to change their own passwords once they have logged in.

**Change password question:** This will allow participants to change the question that is asked of them upon password reset.

**Figure 17: Permission Control**

**Change their demographics:** This will allow participants to change their demographic information, such as their name or address.

**Change their biometrics:** This will allow participants to change their biometric information in the system.

**See biometric charts:** This will allow participants to see a line graph of selected biometric information based on all completed assessments.

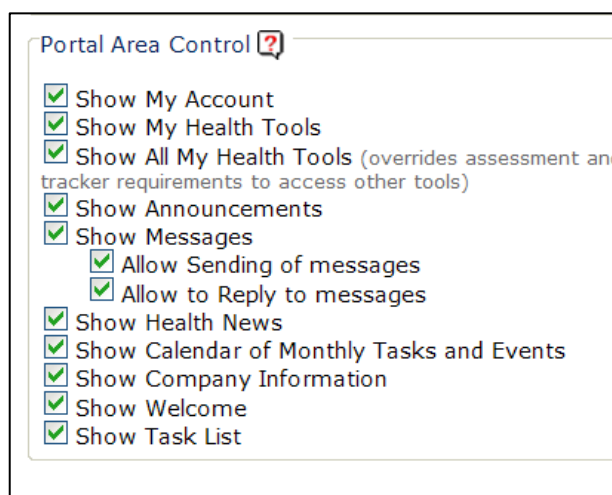
## Portal Area Control

This section controls which items your group will see on their Portal. Some areas are product-specific and only appear if the product is available.

**Show My Account:** This allows participants to access the following information on their Home page:

- Contact Information
- My Health Stats
- My Health Stats Chart
- Change Password
- Change Password Question

**Show My Health Tools:** This will allow your participant to see all of the products you checked for their subgroup, under the Product Control section.



**Figure 18: Portal Area Control options**

**Show All My Health Tools:** Within the WellSuite® Portal, participants are required to complete an assessment or enter information into the Health Activity Tracker™ (if purchased) before they are able to access other products, such as WellNotes®, Online Wellness Center™, or the Healthy Living Guidelines™ videos. However, if you select this box, you are allowing your participants to view these other products before they complete the required information.

**Show Announcements:** You have the ability to create announcements for your participants. For more information on announcements, please see *EMA Management: Add New Announcement* on page 43.

**Show Messages:** The Portal has the ability to send email messages from the administrator to participants. This box will control that ability. For more information on messages, please see *EMA Management: Messages* on page 47.

**Allow Sending of Messages:** If you chose to utilize the mail messaging portion of the Portal, selecting this box allows your participants to send the administrator an email within the Portal.

**Allow to Reply to Messages:** If you chose to utilize the mail messaging portion of the Portal, selecting this box allows your participants to reply to a mail message sent to them by the administrator.

**Show Health News:** Health News is uploaded to client Portals weekly by Wellsource staff. It contains one useful news item each week. This section allows you as the administrator to hide the Health News from your group.

**Show Calendar of Monthly Tasks and Events:** This will allow your participants to see any upcoming events you may have on their Home page calendar. For more information on tasks and events, please see *EMA Management: Events and Tasks* on page 44.

**Show Company Information:** This allows your participants to view information regarding your company. For more information on tasks and events, please see *Theme Settings: Company Information* on page 18.

**Show Welcome:** On your participants' Home page, you have the ability to display a welcome message. This box allows you to hide the welcome message from your group. For more information on the welcome message, please see *Tools: Translate Headers and Welcome* on page 87.


**Show Task List:** The Task List is a list of items that participants can complete to assure that they are continuing toward their goal to stay healthy.



## THEME SETTINGS TAB

This section allows you to configure the background color, banners, and links for your Portal for this subgroup. On the left hand side of the screen, you will see your Product List, as well as the icon key for the Theme Settings tab.

Along with the  **Help** and  **Information** icons, you'll notice two additional icons which are particularly useful in this tab:

 **The Color Picker:** In the Colors section, you have the option to select the colors for several sections of the Portal web page. The Color Picker makes this easy and intuitive. Click this icon, located next to each of the color options boxes, then click the color you want for that section of the web page.

Use the Image Viewer icon (see below) to see which sections of the web page will be affected by your color selections.

Use the **Preview** button at the bottom of the page to see what your color selections will look like to your participants in this subgroup.

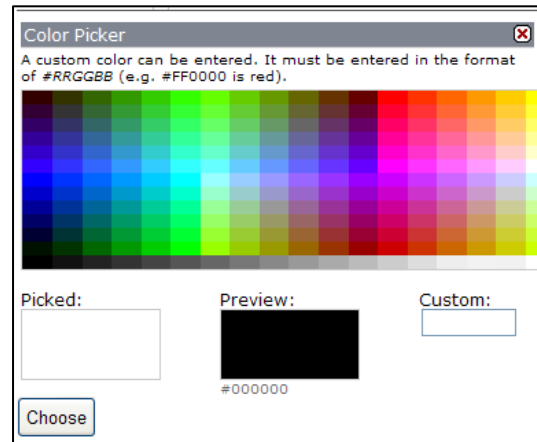


Figure 19: The Color Picker tool


 **The Image Viewer:** Several areas of this tab are very visually-oriented. In these areas, you can click the Image Viewer icon to open a graphical “map” that will help explain the area you are working in. For example, clicking the Image Viewer icon in the Colors section opens a map of the web page sections.



Figure 20: Image Viewer for the Colors section

## Colors

This section allows you to select colors for the Portal. This can be helpful in integrating the web page with your existing online pages. If you know the hexadecimal RGB code for the colors you want, you can enter them directly, preceded by the # character. Alternatively, you can click the color picker icon next to each section to select from a palette of available colors.

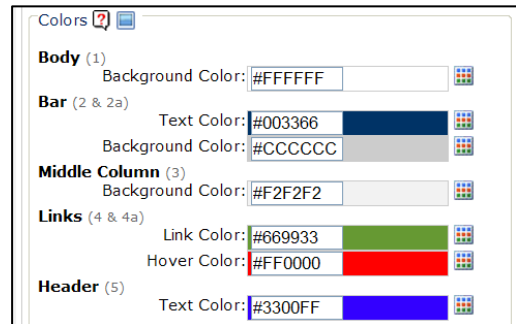


Figure 21: Theme Colors

Custom colors can be applied to most sections of the Portal. Here's an expanded version of the map available with the Image Viewer to help you visualize which sections are affected by your settings:

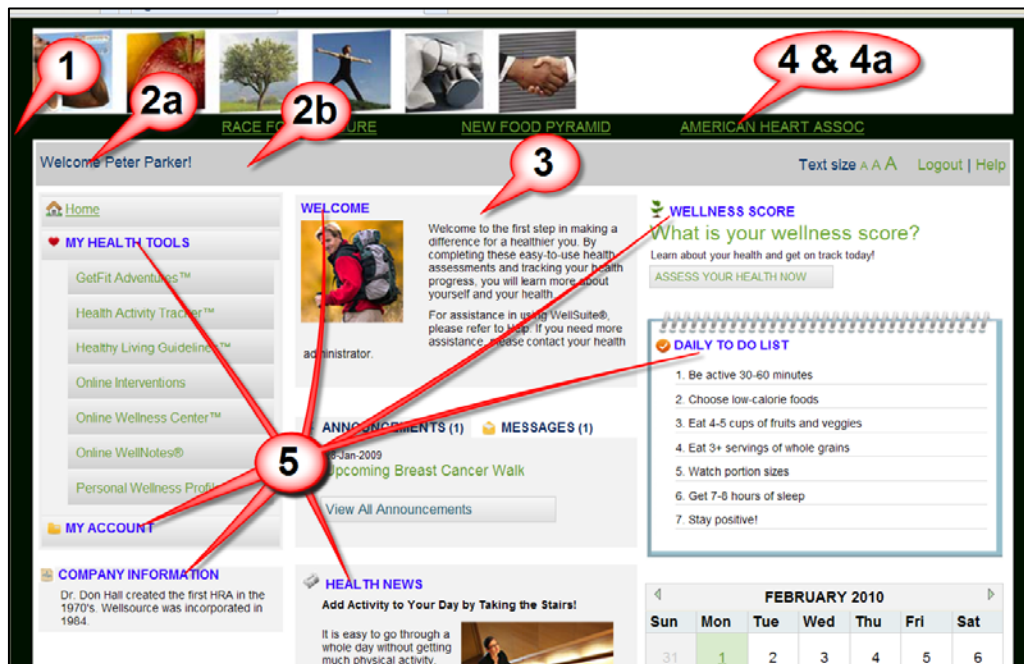


Figure 22: Theme custom color mapping

- **(1) Body Background Color:** This color will be the “frame” of your participants’ site. This is *black* in our example.
- **(2a) Bar Text Color:** This is the color for the text that appears across the top of your participants’ site. In our example, the text is “Welcome Peter Parker!” and the color we have chosen for the text is *dark blue*.

- **(2b) Bar Background Color:** This is the color for the background of the bar that appears across the top of your participants' site. In our example, this is *medium gray*.
- **(3) Middle Column Background Color:** In the example, you can see that the Welcome, Announcements, and Health News boxes in the central column all have a *light gray* background.
- **(4) Link Color:** This is the color that any clickable hyperlink on the page will be. On our page we have created three links (Race for the Cure, New Food Pyramid, American Heart Association), and we've chosen a *medium green* color, to make it stand out against the black background we selected.
- **(4a) Link Hover:** As well as selecting the color of your hyperlinks, you can select the color they will change to when a participant hovers his mouse cursor over them. We've selected *red* for this feature.
- **(5) Header Text Color:** Headers appear in a number of locations on the participant's web page. As you can see in our example, we've chosen to make the headers (My Health Tools, My Account, Company Information, Welcome, Health News, Wellness Score, Daily To Do List) *bright blue*.

Preview your changes by clicking **Preview** (located at the bottom of the page). If you are satisfied with the results, click **Save Changes**.

## Company Information, Banner Control, and Banner Links

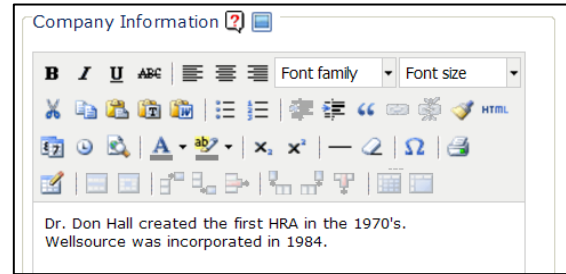
Several areas of content on your participants' web page can be set in the Theme Settings tab. Here is a map showing where they are located:



Figure 23: Theme content map

## Company Information

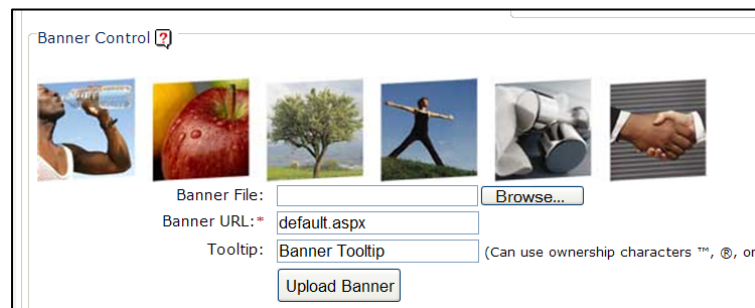
This section (number 1 on our Theme Content Map) allows you to enter a paragraph about your company. You may wish to use this section to describe the history of the company, or to communicate any company news you wish to share with your participants. You have the ability to enter up to 2,000 characters. You can apply formatting as desired with the control buttons, or by entering HTML code directly using the [HTML](#) button. For more information, see *The Rich Text Editor Toolbar* on page 61.



**Figure 24: Company Information editor**

## Banner Control

Each subgroup may be branded with a different banner, and you have the ability to make your banner “clickable.” If your participants click the banner, they can be directed to a site determined by your administrator. The banner is labeled (2) on our Theme Content Map.



**Figure 25: Banner Control**

**Banner Specifications:** The banner must be an image of type **GIF**,

**JPEG**, **JPG**, or **PNG**. The banner must be no wider than 960 pixels and no taller than 100 pixels.

**Banner File:** Click **Browse** to locate your banner file on your computer or network.



**Banner URL:** This section is where you will determine which site your participants will go to when they click the banner. If you don't change it, clicking on the banner will always take your participants to the Home page.

**Tooltip:** The banner tooltip box allows you to create a “hover tag” for your banner section. In this example, when the participant holds their mouse over the banner, the words “Banner Tooltip” will show.

**Upload Banner:** Click this button to upload your banner file and save any changes you have made to the banner area.



## Banner Links

Banner Links  

Note: Can use ownership characters ™, ®, or ©, not HTML equivalent.

<b>Link 1:</b>	Name: <input type="text" value="Race for the Cure"/>	URL: <input type="text" value="http://ww5.komen.org"/>	<a href="http://ww5.komen.org">Race for the Cure</a>
<b>Link 2:</b>	Name: <input type="text" value="New Food Pyramid"/>	URL: <input type="text" value="http://mypyramid.gov"/>	<a href="http://mypyramid.gov">New Food Pyramid</a>
<b>Link 3:</b>	Name: <input type="text" value="American Heart Association"/>	URL: <input type="text" value="http://americanheart.org"/>	<a href="http://americanheart.org">American Heart Association</a>
<b>Link 4:</b>	Name: <input type="text"/>	URL: <input type="text"/>	

To preview how your current theme settings will look with the WellSuite® portal, click the Preview button.

Settings for subgroup(s) were successfully set.

**Figure 26: Banner Links**

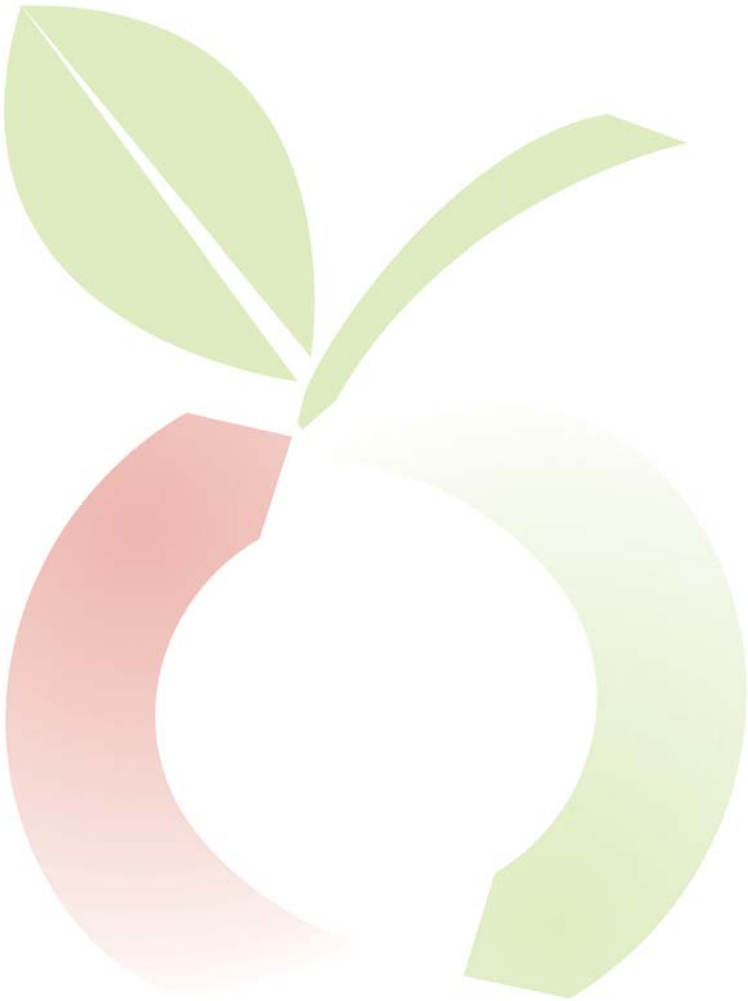
You are allowed to create up to four links within the program, which will be shown at the top of your participants' Portal (number 3 on the Theme Content Map). You may insert any URLs you wish in this section. For example, if you are encouraging your participants to participate in a community event, you could put a link to the event at the top of the page. In our example, we've defined three of the possible four links:

**Name:** This will be the name of the link located on your participants' site. On the far right of the banner links box, you will see an example of what your links will look like to your participants.

**URL:** This is the URL the participants will be taken to when they click the hyperlink. The URL must start with **http://** or **https://** or the link will not work.

**Save Changes:** This button will save all changes on the page.

**Preview:** This button allows you to preview the changes you have just made by opening the proposed changes in another Internet browser window.




## PARTICIPANTS TAB

---

The Participants tab is where you can perform most of the actions needed to administer your participants' accounts. You can add or delete participants, administer passwords, change a participant's subgroup or status, see who has completed assessments, and merge participants.

When in the Participants tab, you will have a key in the bottom left hand corner that shows you the definitions of different icons on the page.

**Help Button:** Click  to get help for a specific area.

**Information Button:** Click  to see more information on how to utilize the section you are in.

**Opens Color Picker:** This icon is located next to color options boxes.

**Opens Image Viewer:** Click this icon to open a diagram of the control box, with definitions of what each button does.

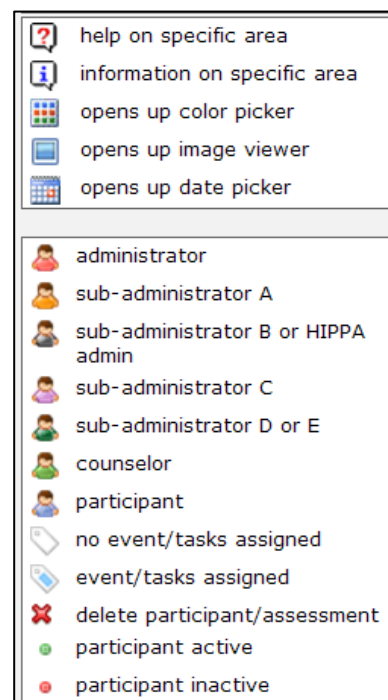
**Opens Date Picker:** You will see this icon located next to a date field. It will open up a calendar to allow a date selection.

**Participant Symbol:** The participant symbol is color coded, indicating which type of permission your participant is granted.

**Events/Tasks:** If your participant has any active tasks assigned to them, you will see a blue tag.

**Delete Participant/Assessment:** Click this icon to delete either an assessment or participant record.

**Account Status:** This shows you if your participant's account is active or inactive. Green indicates enabled (active) and red designates disabled (inactive).



**Figure 27: Icon Key for Participants**

## Participants: Participants Sub-tab

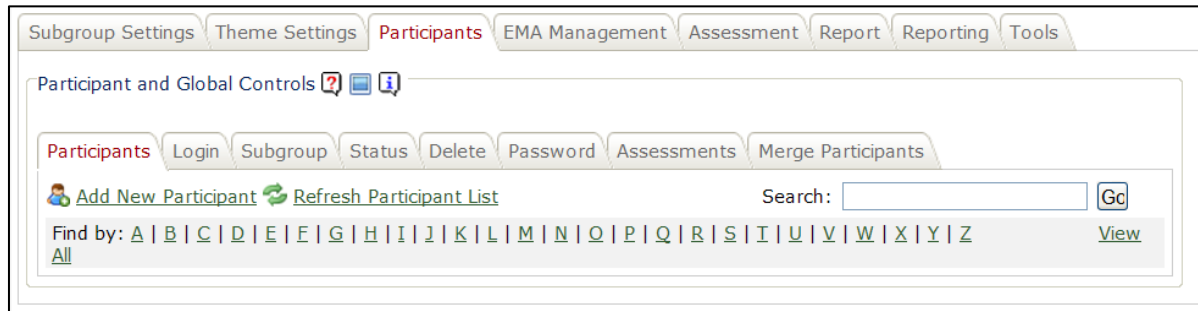


Figure 28: The Participants sub-tab of the Participants tab

### Add New Participant

#### Step 1 – Demographic Information

1. Click [Add New Participant](#).
2. Enter the demographic information for this new participant, based upon which personal information you required while configuring the Subgroup Settings tab. Options include:
  - a. Country
  - b. First Name
  - c. Middle Initial
  - d. Last Name
  - e. Address 1
  - f. Address 2
  - g. City
  - h. State/Province
  - i. Postal Code
  - j. Email
  - k. Home/Cell Phone Number
  - l. Work Phone Number
3. Click **Next**.

#### Step 2 – Biometric Information

You can enter the following biometric information for a new participant:

1. Birth Date
2. Gender (NOTE: Once you enter gender, it cannot be changed. Please verify your information is correct prior to data entry.)
3. Height
4. Weight

Figure 29: Add Participant - Step 1

Figure 30: Add Participant - Step 2 (U.S. measurements shown)

5. Waist Girth
6. BMI (Body Mass Index)
7. Click **Next**.

### Step 3 – Login Credentials & Status

1. Add a unique User Name/ ID for the participant.
2. Enter Password.
3. Confirm Password.
4. The security question should be chosen by the participant. Leave blank.
5. Choose the participant's status. Default is "Active."
6. Click **Next**.

The screenshot shows a web form titled "Add Participant" with the sub-header "Step 3: Login Credentials & Status". A warning message at the top states: "User name/id cannot be identical to an existing user name/id. Also, p". The form is divided into several sections:

- User Name/ID:** A text input field containing "Elvis".
- Password:** Two text input fields, one for "Password: \*" and one for "Confirm Password: \*".
- Question and Answer:** A dropdown menu for "Question:" with "What is your favorite color?" selected, and an empty text input field for "Answer:".
- Status:** Two radio buttons, "Active" (which is selected) and "Inactive".

At the bottom of the form are two buttons: "<< Previous" and "Next >>".

Figure 31: Add Participant - Step 3

### Step 4 - Permission

There are thirteen different levels of permission on the Portal. The first twelve are Administrative levels, and the thirteenth level—the default—is for participants.

1. **Administrator:** An *Administrator* has full control over the entire site: all groups and subgroups, participant management, settings, and reporting. The Administrator may also create any type of participant within the system.
2. **Sub-Administrator A:** A *Sub-Administrator A* has full control of the entire site, with one exception: she cannot make participant changes.
3. **Sub-Administrator B:** A *Sub-Administrator B* has full control of one specific group (company) within the site. [If you have not opted to use our Value-Added-Reseller (VAR) option, and have not purchased additional Vertical Enterprise Units (VEU) this section does not apply to you.]
4. **Sub-Administrator C:** A *Sub-Administrator C* has full control of one specific group (company) within the URL, with one exception: she cannot make participant changes. [If you have not opted to use our Value-Added-Reseller (VAR) option, and have not purchased additional Vertical Enterprise Units (VEU) this section does not apply to you.]
5. **Sub-Administrator D:** A *Sub-Administrator D* has full control of the specific subgroup to which she belongs.

6. **Sub-Administrator E:** A *Sub-Administrator E* only has full access to reporting. She has no other control.
7. **HIPAA A Administrator:** A *HIPAA A Administrator* has access to the entire site; however she cannot see participant-identifiable information, nor does she have any subgroup settings control.
8. **HIPAA A Administrator Group:** A *HIPAA A Administrator Group* has access to her specific group (company) only and cannot see participant-identifiable information, nor does she have any subgroup settings control.
9. **HIPAA A Administrator Subgroup:** A *HIPAA A Administrator Subgroup* has access to her specific subgroup only and cannot see participant-identifiable information, nor does she have any subgroup settings control.
10. **Counselor:** A *Counselor* can't make changes. She can only view and generate reports for the entire site.
11. **Counselor Group:** A *Counselor Group* administrator can't make changes, and can only view and generate reports for her specific group (company).
12. **Counselor Subgroup:** A *Counselor Subgroup* administrator can't make changes. She can only view and generate reports for their specific subgroup.
13. **Participant:** A *participant* only has access to the participant side; no administrative permission. This is the default permission level.

User	Capabilities	Can Create
<input type="radio"/> 1: Administrator	Administrator - full control.	1-13
<input type="radio"/> 2: Sub-Administrator A	Sub-Administrator A - full control except no participant management.	
<input type="radio"/> 3: Sub-Administrator B	Sub-Administrator B - full control of specific company(group).	5,9,12,13
<input type="radio"/> 4: Sub-Administrator C	Sub-Administrator C - full control of specific company(group) except no participant management.	
<input type="radio"/> 5: Sub-Administrator D	Sub-Administrator D - full control of specific subgroup they belong to.	
<input type="radio"/> 6: Sub-Administrator E	Sub-Administrator E - full control of participants and reporting only.	
<input type="radio"/> 7: HIPAA A Administrator	HIPAA A Administrator - cannot see participant identifiable information. No subgroup settings control.	
<input type="radio"/> 8: HIPAA A Administrator Group	HIPAA A Administrator Group - cannot see participant identifiable information, specific Group only. No subgroup settings control.	
<input type="radio"/> 9: HIPAA A Administrator Subgroup	HIPAA A Administrator Subgroup - cannot see participant identifiable information, specific Subgroup only. No subgroup settings control.	
<input type="radio"/> 10: Counselor	Counselor - can't change anything, can only view and generate reports.	
<input type="radio"/> 11: Counselor Group	Counselor Group - can't change anything, can only view and generate reports, specific Group only.	
<input type="radio"/> 12: Counselor Subgroup	Counselor Subgroup - can't change anything, can only view and generate reports, specific Subgroup only.	
<input checked="" type="radio"/> 13: Participant		

Figure 32: Add Participant - Step 4

To proceed with adding a participant:

1. Choose the level of permission you want to give your participant. In most cases, this will be the default, “13: Participant.”
2. Click **Finish**.
3. Click **Close**.

### Refresh Participant List

By clicking [Refresh Participant List](#), you will see an updated list of all of your participants. Once your list is refreshed, you will see all of your participants listed below.

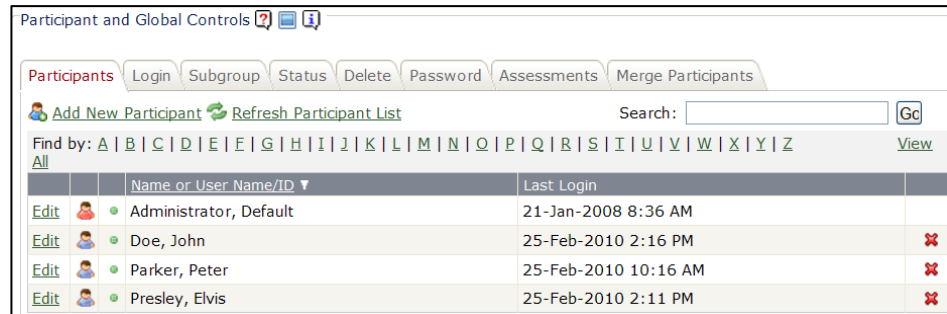


Figure 33: A refreshed participant list

**Participant Symbol:** The participant symbol is color coded, depending on which type of permission your participant is granted.

**Events/Tasks:** If your participant has any active tasks assigned to him, you will see a blue tag.

**Delete Participant/Assessment:** Click this icon to delete either an assessment or a participant record.

**Account Status:** This shows you if your participant's account is active or inactive.

- Green dot – Active
- Red dot – Inactive

**Resend RTDF:** If you have the Real-Time Data Feed option, clicking this icon where it appears will send a new copy of the XML data for a participant to your system.

**Recalculate Assessment:** Clicking this icon will re-calculate any changed items in a participant's assessment, which may result in changes to his report.

**Edit:** If you wish to make any changes to a participant, click [Edit](#) next to this icon.

### Search

If you are looking for a specific participant, you may search by using the "Search Box." Simply type the user name or participant name in the box, and click **Go**.

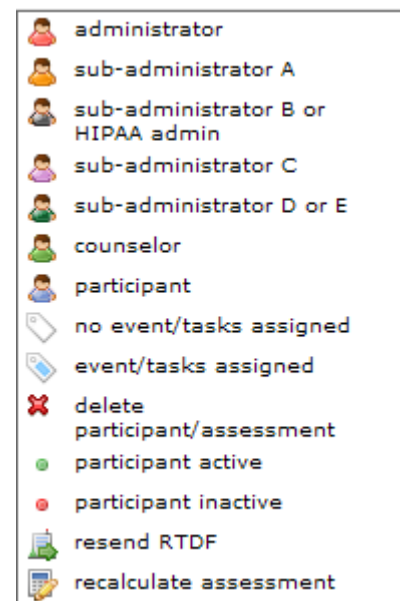


Figure 34: Icon key for Participants sub-tab

## Find By

You may use this section if you are looking for users whose last names start with a particular letter. Simply click the letter that the participant's last name starts with to conduct your search.

## Edit a Participant

You will use this section to edit the following information for a participant.

- Demographics
- Biometrics & Clinicals
- Username/ID & Password
- Permissions
- Subgroup & Status

### Edit a Participant's Demographics

The screenshot shows a web browser window titled "Edit Participant" for a user named "Baker, Chesney". The "Demographics" tab is active. The form contains the following fields and values:

- Country: United States (dropdown)
- First Name: Chesney (text input, marked with an asterisk)
- Middle Initial: (empty text input)
- Last Name: Baker (text input, marked with an asterisk)
- Address 1: (empty text input)
- Address 2: (empty text input)
- City: Yale (text input)
- State/Province: Oklahoma (dropdown)
- Postal Code: (empty text input)
- Email: chet@horn.com (text input, marked with an asterisk)
- Home/Cell: (empty text input)
- Work: (empty text input)

On the right side, there is a photo of a man. Below the photo is a "Browse..." button and an "Upload Photo" button. A note below the photo states: "When a new photo for the participant is uploaded it may not show until the next visit to the participant." At the bottom left of the form is a "Save Changes" button. A legend in the top right corner indicates that an asterisk denotes a required field.

Figure 35: Edit Participant demographics

- **Country:** Participant's country of residence.
- **First Name:** Participant's first name.
- **Middle Initial:** Participant's middle initial.
- **Last Name:** Participant's last name.
- **Address 1:** Participant's street number.
- **Address 2:** Participant's building, apartment, or suite number.



- **City:** Participant's city of residence.
- **State/Province:** Participant's state or province of residence.
- **Postal Code:** Participant's postal code.
- **Email:** Participant's email address.
- **Home/Cell:** Participant's personal phone number.
- **Work:** Participant's work phone number.
- **Upload Photo:** You have the ability to upload a photo for your participant. The photo must be no larger than 195 pixels high by 195 pixels wide.
  - Click **Browse** to find a picture of the participant on your computer.
  - Once you have found the picture, click **OK**.
  - Click **Upload Photo**.
  - Save your changes.

### Edit a Participant's Biometrics & Clinicals

During your Subgroup Settings Configuration, you decided whether your participants would be allowed to enter or edit their own biometrics. In this section, you would enter their biometrics if they were unable to do so.

**Edit Participant** ✕

Baker, Chesney \* Denotes required field

Demographics **Biometrics & Clinicals** User Name/ID & Password Permissions Subgroup & Status

General & Clinicals ?

---

**Generals**

Age:

Birth Date:

Year:

Month:

Day:

Gender:  Male  Female

Height:  ft.

Weight:  lbs. (min: 50; max: 999)

Waist Girth:  in. (min: 15; max: 99)

BMI:  ?

**Cholesterol**

Cholesterol:

HDL:

LDL:  (min: 1; max: 300)

**Blood Pressure**

Systolic:

Diastolic:

**Clinicals**

Race:

Resting Pulse:

Clinical Height:  ft.

Clinical Weight:  lbs. (min: 50; max: 999)

Blood Test:  Fasting  Non-Fasting

Glucose Fasting Test:

Hemoglobin A1c:  (min: 1; max: 20)

PSA Test:  (min: 0.01; max: 30)

Triglycerides:  (min: 1; max: 5000)

Blood Glucose:  (min: 1; max: 700)

Flexibility:

Situps:  /min.

Pushups:  /min.

Grip Strength:

% Body Fat:  (min: 1; max: 60)

GXT Heart Rate:

GXT Exercise Time:  min.  sec.

METS:  (min: 0.01; max: 99)

Copy General and Clinical to Latest Assessment  
(Only valid if latest assessment is within the "Bio Updates" date range)

Figure 36: Edit Participant Biometrics and Clinicals

## Generals

- **Age:** Participant's age at the time of entry.
- **Birth Date (Year, Month, Day):** Participant's date of birth.
- **Gender:** *Male* or *Female*.
- **Height:** Participant's height.
- **Weight:** Participant's weight. Must be a minimum of 66 pounds, and a maximum of 999 pounds.
- **Waist Girth:** Size of participant's waist. Must be a minimum of 15 inches, and a maximum of 99 inches.
- **BMI:** Body Mass Index (BMI) – a measurement of the relative percentages of fat and muscle mass in the human body which is used as an index of obesity. This number self-calculates within the program, based upon a calculation of the participant's height and weight.

BMI Chart:	
Underweight	< 18.5
Normal weight	18.5 - 24.9
Overweight	25 - 29.9
Obese	30+

## Cholesterol

- **Cholesterol:** Total Cholesterol.
- **HDL:** "Good" Cholesterol. Healthy levels are:
  - Men: Should be 40+
  - Women: Should be 50+
- **LDL:** "Bad" Cholesterol. A healthy level is less than 200.

## Blood Pressure

- **Systolic:** Normal level is under 120.
- **Diastolic:** Normal level is under 80.

## Clinicals

Please refer to the Personal Wellness Profile™ Fitness Testing Guidelines Manual for more information regarding clinical test administration and testing norms.

- **Race:** Participant's race.
- **Resting Pulse:** The heart rate while at rest. The most accurate resting pulse is one taken just after waking up from a good night's rest and prior to getting out of bed.

- **Clinical Height:** Height based upon measurement utilizing a scale with a height measuring system, or a measuring device taped flat to a wall.
- **Clinical Weight:** Weight calculated by using a balance scale.
- **Blood Test:** Select *Fasting* or *Non-Fasting*
- **Glucose Fasting Test:** Select *Normal*, *Moderately Elevated*, *High*, or *Don't Know*.
- **Hemoglobin A1c:** Measures the amount of glycosylated hemoglobin in the blood.
- **PSA Test:** Prostate-Specific Antigen (PSA) blood test.
- **Triglycerides:** Blood test. Should be 100 or less.
- **Blood Glucose:** Blood test. Should be less than 90.
- **Flexibility:** Measured sit and reach test.
- **Situps:** How many sit-ups a participant can complete continuously within a two-minute time period.
- **Pushups:** How many push-ups a participant can complete without resting. No time limit.
- **Grip Strength:** Measure by using a Handgrip Dynamometer.
- **% Body Fat:** Measure by using a Body Fat monitor.
- **GXT Heart Rate:** Heart rate during the GXT Test.
- **GXT Exercise Time:** Length of the GXT Test in minutes (min.) and seconds (sec.)
- **METs:** Metabolic Equivalents. Measures the rate of oxygen consumed based on exercise activity. Can be tested by using a one-mile walk.
- **Copy General and Clinical to Latest Assessment** (Only valid if latest assessment is within the “Bio Updates” date range.)

Be certain you click **Save Changes** when you are done.

## Edit a Participant's User Name/ID or Password

The screenshot shows a web application window titled "Edit Participant" for a user named "Baker, Chesney". The "User Name/ID & Password" tab is selected. At the top, there are checkboxes for "Change: User Name/ID", "Password", and "Question & Answer" with the instruction "(Check all that apply)". The "User Name/ID" section has a text input field containing "chetb". The "Password" section has two text input fields labeled "Password:\*" and "Confirm Password:\*". The "Question and Answer" section shows the "Current Question" as "What is your favorite color?" and the "New Question" as a dropdown menu also containing "What is your favorite color?". Below the dropdown is an "Answer:" text input field. A "Save Changes" button is located at the bottom of the form.

**Figure 37: Edit Participant's User Name, ID, or Password**

In this screen, you can change any or all of the following for a participant:

- **User Name/ID**
- **Password**
- **Question and Answer** for password reset

In addition to filling in the new values, you must select the checkbox(es) to tell the system which values you are changing. Be certain you click **Save Changes** when you are done.

**Edit a Participant's Permissions**

**Edit Participant** \* Denotes required field

Baker, Chesney

Demographics | Biometrics & Clinicals | User Name/ID & Password | **Permissions** | Subgroup & Status

User	Capabilities	Can Create
<input type="radio"/> 1: Administrator	Administrator - full control.	1-13
<input type="radio"/> 2: Sub-Administrator A	Sub-Administrator A - full control except no participant management.	
<input type="radio"/> 3: Sub-Administrator B	Sub-Administrator B - full control of specific company(group).	5,9,12,13
<input type="radio"/> 4: Sub-Administrator C	Sub-Administrator C - full control of specific company(group) except no participant management.	
<input type="radio"/> 5: Sub-Administrator D	Sub-Administrator D - full control of specific subgroup they belong to.	
<input type="radio"/> 6: Sub-Administrator E	Sub-Administrator E - full control of participants and reporting only.	
<input type="radio"/> 7: HIPAA A Administrator	HIPAA A Administrator - cannot see participant identifiable information. No subgroup settings control.	
<input type="radio"/> 8: HIPAA A Administrator Group	HIPAA A Administrator Group - cannot see participant identifiable information, specific Group only. No subgroup settings control.	
<input type="radio"/> 9: HIPAA A Administrator Subgroup	HIPAA A Administrator Subgroup - cannot see participant identifiable information, specific Subgroup only. No subgroup settings control.	
<input type="radio"/> 10: Counselor	Counselor - can't change anything, can only view and generate reports	
<input type="radio"/> 11: Counselor Group	Counselor Group - can't change anything, can only view and generate reports, specific Group only	
<input type="radio"/> 12: Counselor Subgroup	Counselor Subgroup - can't change anything, can only view and generate reports, specific Subgroup only	
<input checked="" type="radio"/> 13: Participant		

**Figure 38: Edit Participant's Permissions**

When you created the participant, you assigned him a permissions level, most likely level 13: “Participant,” unless you were creating an Administrator or Counselor. If you now need to change a participant’s permission level, simply select the new level in this screen, and click **Save Changes**.

## Edit a Participant's Subgroup or Status

The screenshot shows a web application window titled "Edit Participant" for a user named "Baker, Chesney". The window has several tabs: "Demographics", "Biometrics & Clinicals", "User Name/ID & Password", "Permissions", and "Subgroup & Status". The "Subgroup & Status" tab is active. At the top right, there is a note: "\* Denotes required field". Below the tabs, there are two checkboxes: "Change:  Status  Subgroup (Check all that apply)". Under the "Status" section, there are two radio buttons: "Active" (which is selected) and "Inactive". Under the "Subgroup" section, it shows "Current Subgroup: SPtest" and "New Subgroup: AA Test" in a dropdown menu. At the bottom of the window, there is a "Save Changes" button.

**Figure 39: Edit a Participant's Status or move to a different Subgroup**

In this window, you can change a participant's status or move him to a different subgroup.

- **Status:** Select *Active* or *Inactive*.
- **Subgroup:** Select the participant's new subgroup from the drop-down menu.

In addition to filling in the new values, you must select the checkbox(es) to tell the system which values you are changing. Be certain you click **Save Changes** when you are done.

## Participants: Subgroup Sub-tab

**NOTE:** The **Subgroup**, **Status**, and **Delete** sub-tabs all work in a very similar fashion. Two list boxes are shown on the screen. A list of participants is generated in the left-hand column, and action buttons between the list boxes allow you to perform specific actions on one or more (or all) participants you select. Select a single participant by clicking a name, or select multiple participants by holding down the **Ctrl** key while clicking multiple names.

The **Subgroup** sub-tab allows you to move one or more participants from their current subgroup to a different subgroup.

**Figure 40: Move participants to another subgroup**

- **Subgroups:** Choose the subgroup you wish to move participants *into* from the drop-down list.
- **Add:** Highlight the participant(s) on the left you wish to add to your chosen subgroup. Click a single name or hold down the **Ctrl** key while clicking multiple names. Click **Add** to move the names to the right-hand list box.
- **Remove:** Highlight the name(s) on the right you wish to remove from the list of participants to be moved to the new subgroup. Click **Remove** to move the names back to the left-hand box.

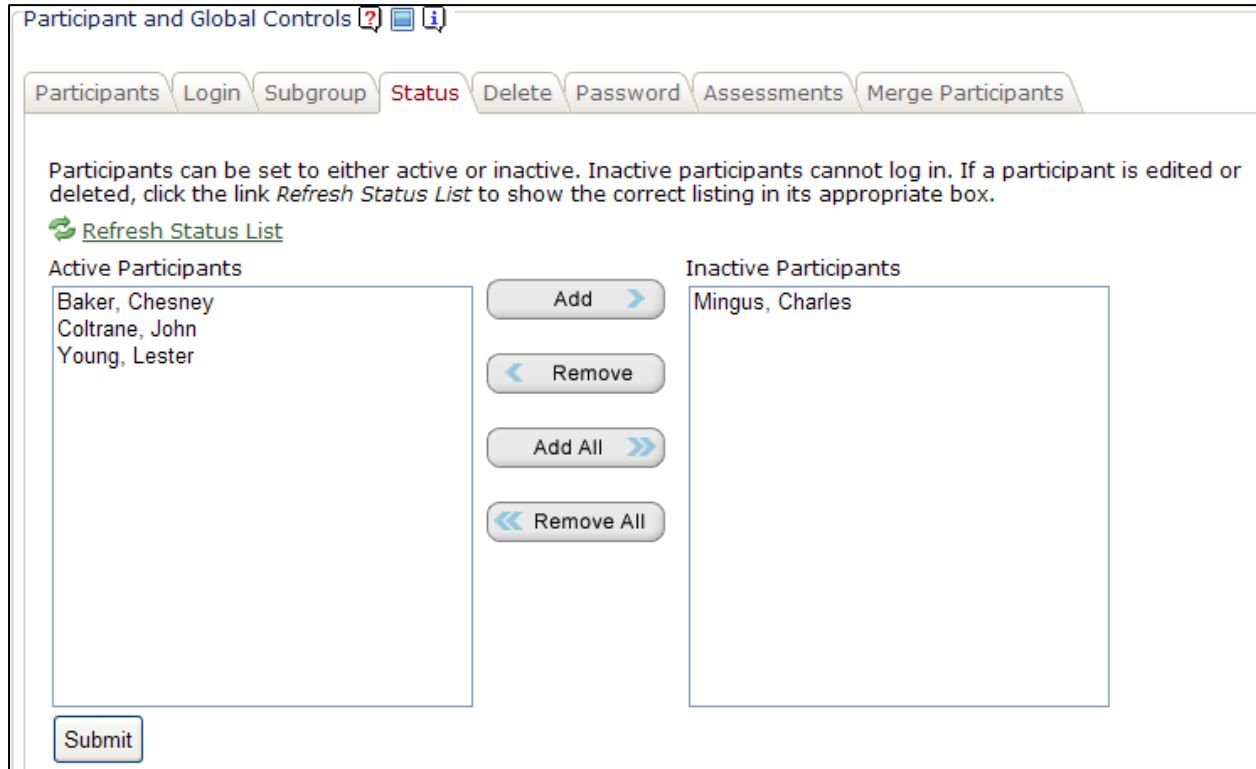
- **Add All:** This button will allow you to add all of the participants within the subgroup you are configuring into your chosen subgroup.
- **Remove All:** This button will allow you to remove all of the participants within your chosen subgroup, and move them into the subgroup you are configuring.

Once you have made your choice, click **Submit**. All the participants listed in the right-hand box are new members of the new subgroup.



## Participants: Status Sub-tab

Within this sub-tab, you may activate or deactivate participants within your subgroup. Inactive participants are not allowed to log in to the system.



**Figure 41: Activate or Inactivate Participants**

- **Active Participants:** This box will show you all of the active participants within your current subgroup.
- **Inactive Participants:** This box shows you the inactive participants within your current subgroup.
- **Add:** To move one or more participants to the “Inactive Participants” list, click the participant name(s) and then click **Add**.
- **Remove:** To remove one or more participants from the “Inactive Participants” list, click the participant name(s) and then click **Remove**. The participants will be added to the “Active Participants” list.
- **Add All:** To move all participants to the “Inactive Participants” list—in other words, to inactivate all members of the subgroup—click **Add All**.
- **Remove All:** To remove all participants from the “Inactive Participants” list—in other words, to activate all members of the subgroup—click **Remove All**.

Once you have made changes, click [Refresh Status List](#) to see your updated list. When you are finished, click **Submit**.

## Participants: Delete Sub-tab

This sub-tab allows you to delete specific participants, or an entire group of participants from the subgroup. It is recommended you delete fewer than 200 individuals at one time.

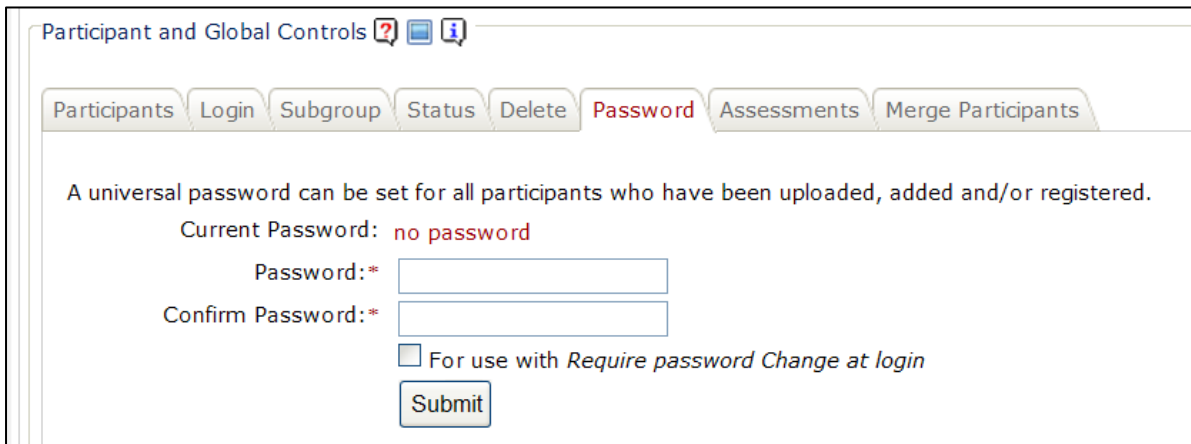
**Figure 42: Delete Participants**

- **Participants:** This box shows a list of all participants within your current subgroup.
- **Participant(s) to Delete:** This box shows a list of participants who will be deleted.
- **Add:** To add participants to the “Participant(s) to Delete” list, select one or more participants in the left-hand list box, and then click **Add**.
- **Remove:** To remove participants from the “Participant(s) to Delete” list, click the participant names and then click **Remove**.
- **Add All:** To add all participants to the “Participant(s) to Delete” list—in other words, to delete all participants from the current subgroup—click **Add All**.
- **Remove All:** To remove all participants from the “Participant(s) to Delete” list, click **Remove All**.

Once you have made changes, click [Refresh Delete List](#) to see your updated list. When finished, click **Submit**.

## Participants: Password Sub-tab

This sub-tab allows you to create a universal password for each participant in the current subgroup.



Participant and Global Controls ? [ ] [ i ]

Participants Login Subgroup Status Delete Password Assessments Merge Participants

A universal password can be set for all participants who have been uploaded, added and/or registered.

Current Password: no password

Password: \* [ ]

Confirm Password: \* [ ]

For use with *Require password Change at login*

Submit

**Figure 43: Create a Universal password**

- **Current Password:** Your current universal password, if it exists.
- **Password:** Enter the new universal password.
- **Confirm Password:** Re-enter the new universal password.
- **For use with *Require Password Change at Login*:** Check this box if you want to force a password change at your participants' next login. Since all of your participants will initially have the same password, it's a good idea to select this option. For this option to be effective, you must have also selected the *Require Password Change at Login* option in **Subgroup Settings**. See page 11 for more information about this option.

Click **Submit** to save your changes.

## Participants: Assessments Sub-tab

Within the Assessments sub-tab, an administrator is able to see who has completed an assessment and who has not completed an assessment, and send that information to an Excel spreadsheet. You can also browse the list of participants by the first letter of the last name.

- Assessments Taken:** To receive a list of participants who have taken at least one assessment, click [Assessments Taken](#). In this example, participant Lester Young has taken and completed one assessment; Chesney Baker has taken five assessments but has only *completed* two of them.

Name	Assessments																		
Baker, Chesney	<table border="1"> <thead> <tr> <th>Completed</th> <th>Assessment Name</th> <th>Date (most recent first)</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>2010 July 30</td> <td>30-Jul-2010 3:09 PM</td> </tr> <tr> <td>Yes</td> <td>2010 July 15</td> <td>15-Jul-2010 9:16 AM</td> </tr> <tr> <td>Yes</td> <td>2010 July 14</td> <td>14-Jul-2010 4:47 PM</td> </tr> <tr> <td>No</td> <td>2010 July 14</td> <td>14-Jul-2010 4:44 PM</td> </tr> <tr> <td>No</td> <td>2010 July 14</td> <td>14-Jul-2010 12:25 PM</td> </tr> </tbody> </table>	Completed	Assessment Name	Date (most recent first)	No	2010 July 30	30-Jul-2010 3:09 PM	Yes	2010 July 15	15-Jul-2010 9:16 AM	Yes	2010 July 14	14-Jul-2010 4:47 PM	No	2010 July 14	14-Jul-2010 4:44 PM	No	2010 July 14	14-Jul-2010 12:25 PM
	Completed	Assessment Name	Date (most recent first)																
	No	2010 July 30	30-Jul-2010 3:09 PM																
	Yes	2010 July 15	15-Jul-2010 9:16 AM																
	Yes	2010 July 14	14-Jul-2010 4:47 PM																
No	2010 July 14	14-Jul-2010 4:44 PM																	
No	2010 July 14	14-Jul-2010 12:25 PM																	
Mingus, Charles	<table border="1"> <thead> <tr> <th>Completed</th> <th>Assessment Name</th> <th>Date (most recent first)</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>2010 July 13</td> <td>13-Jul-2010 1:46 PM</td> </tr> <tr> <td>No</td> <td>2010 July 13</td> <td>13-Jul-2010 1:22 PM</td> </tr> </tbody> </table>	Completed	Assessment Name	Date (most recent first)	No	2010 July 13	13-Jul-2010 1:46 PM	No	2010 July 13	13-Jul-2010 1:22 PM									
	Completed	Assessment Name	Date (most recent first)																
No	2010 July 13	13-Jul-2010 1:46 PM																	
No	2010 July 13	13-Jul-2010 1:22 PM																	
Young, Lester	<table border="1"> <thead> <tr> <th>Completed</th> <th>Assessment Name</th> <th>Date (most recent first)</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>SUMMER 2010 CAMPAIGN</td> <td>15-Jul-2010 2:31 PM</td> </tr> </tbody> </table>	Completed	Assessment Name	Date (most recent first)	Yes	SUMMER 2010 CAMPAIGN	15-Jul-2010 2:31 PM												
Completed	Assessment Name	Date (most recent first)																	
Yes	SUMMER 2010 CAMPAIGN	15-Jul-2010 2:31 PM																	

Figure 44: View list of assessments taken

- Assessments Not Taken:** To receive a list of participants who have not taken an assessment, click [Assessments Not Taken](#). In this example, participant John Coltrane has not completed an assessment.

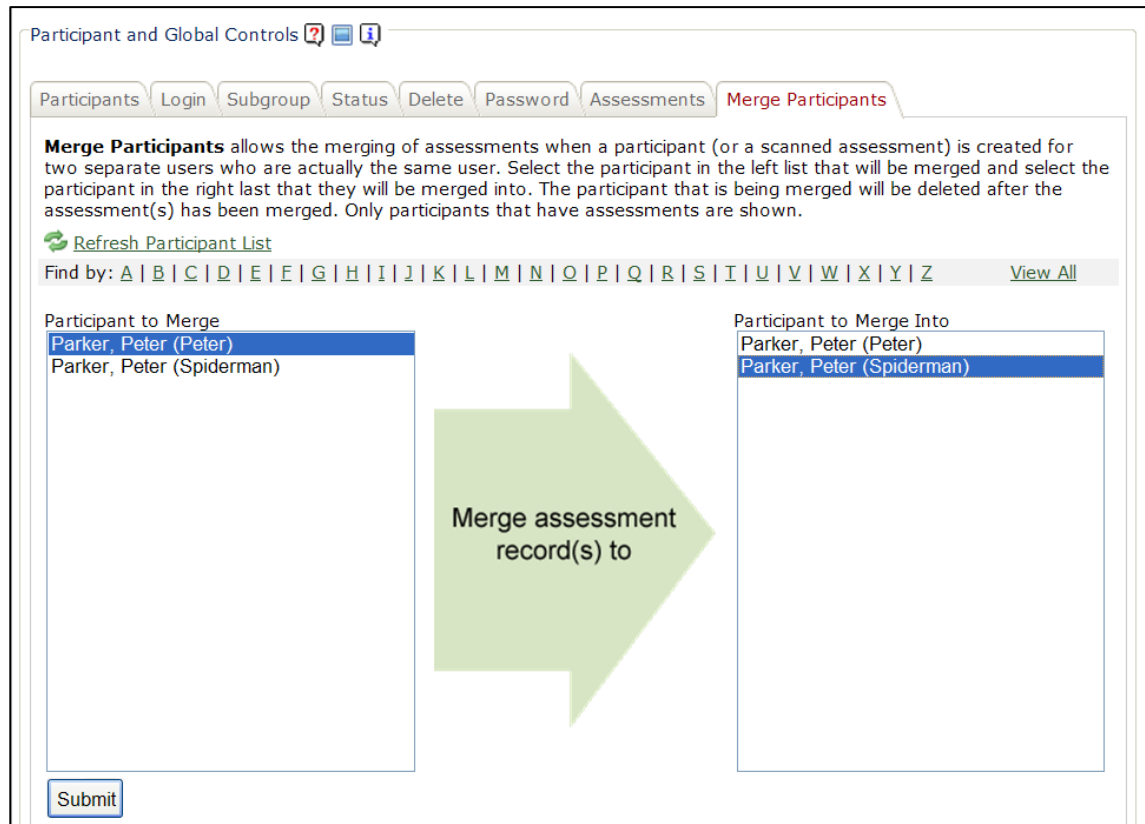
Name
Coltrane, John

Figure 45: List of assessments NOT taken

- **Refresh Assessment List:** To refresh either your “Assessments Taken” or “Assessments Not Taken” list, click [Refresh Assessment List](#).
- **Export to Excel:** To export either list (“Assessments Taken” or “Assessments Not Taken”) into Excel, click [Export to Excel](#).
- **Find By:** Click a letter to find all participants by the first letter of their last name.
- **View All:** By clicking **View All** while browsing participants by first letter of their last name you will receive a list of all participants within either criterion (“Assessments Taken” or “Assessments Not Taken”).
- **Delete an Assessment:** To delete any assessment, simply click the red **X** to the right of any assessment listed.

## Participants: Merge Participants Sub-tab

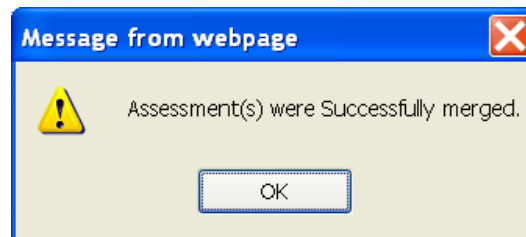
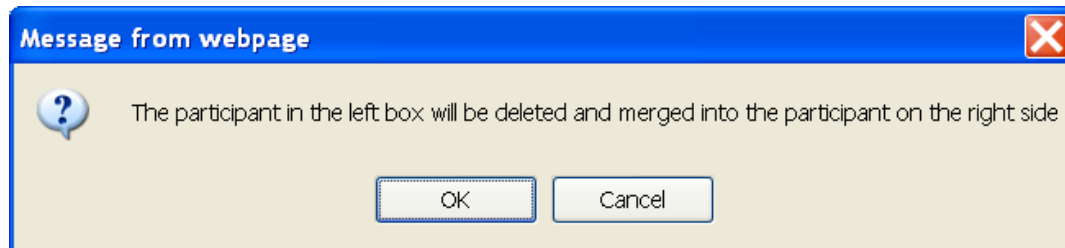
The Merge Participants sub-tab allows the merging of assessments when a participant (or a scanned assessment) is created for two separate users who are actually the same user. Select the participant in the “Participant to Merge” list (on the left) and select the participant in the “Participant to Merge Into” list (on the right) that he will be merged into. The participant who is being merged will be deleted after the assessments have been merged. Only participants who have assessments are shown.



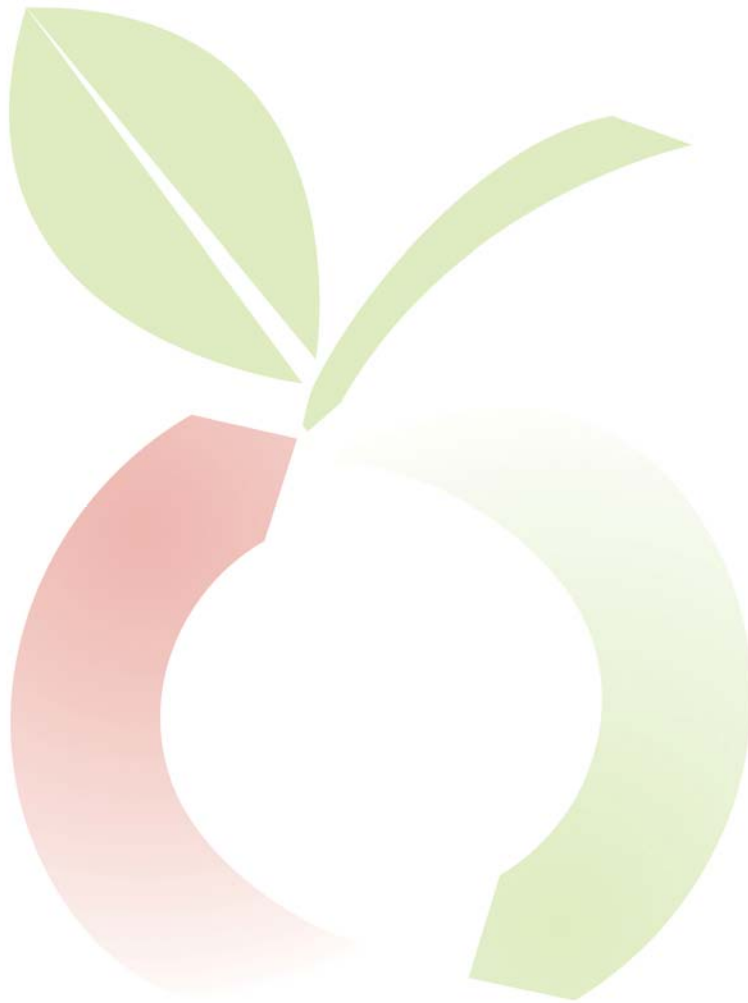
**Figure 46: Merge Participants**

1. Click **Refresh Participant List**. If you have a very long list, you can use the "Find By" letters to locate your participant by last name, or you can just scroll down the list. All participants appear in *both* columns.
2. Click the name of the participant you want to merge *from* in the left-hand column..
3. Click the name of the participant you want to merge *into* in the right column.
4. Click **Submit** to continue.

5. You will receive a message to verify you intend to merge the participants together. Click **OK**.
6. Once you have clicked OK, you should receive another message that the assessments were successfully merged. All assessments from the participant on the left are now transferred to the participant on the right, and the account of the participant on the left is permanently deleted.



**Figure 47: Merge messages**





## EMA MANAGEMENT TAB

The tab labeled **EMA Management** (**E**vents, **M**essages, and **A**nnouncements Management) is used to communicate with your participants.

The screenshot shows the EMA Management Tab interface with the following sections:

- Announcements:** Includes links for "Add New Announcement" and "Refresh Announcement List". A table lists an announcement: "Art for Arthritis, Sept. 4-5" with an expiration date of "06-Sep-2010".
- Events and Tasks:** Includes links for "Add New Event/Task", "Refresh Event/Task List", and "View Calendar". A table lists an event: "Weekly Weigh-In" with an expiration date of "11-Jan-2012".
- Messages:** Includes links for "Send New Message", "Refresh Participant List", and "Refresh Messages". A table lists messages from "Admin Administrator" with subjects "Assessment", "Hey", and "jo".

Figure 48: The EMA Management Tab

### Announcements


In the Announcements section, you are able to create announcements to show your participants on their Home page. You could announce an upcoming health fair, wellness program, or make any other announcements you like. The Announcement section has three options: [Add New Announcement](#), [Refresh Announcement List](#), and [Edit](#).



This close-up screenshot shows the "Announcements" section with the following elements:

- Links for "Add New Announcement" and "Refresh Announcement List".
- A table with one row: "Art for Arthritis, Sept. 4-5" with an expiration date of "06-Sep-2010".

Figure 49: Announcements

## Add or Edit an Announcement

To add a new announcement, click  [Add New Announcement](#).

1. Add a title.
2. Give the announcement an expiration date (when you would like the announcement to drop off your participants' Home page). For example, if the announcement is for an event on a specific day, you'll probably want the announcement to drop off on the following day.
3. Enter details regarding your announcement using the Rich Text Editor. You may add up to 2,000 characters. See page 61 for information about the Rich Text Editor toolbar.
4. Click **Submit**.
5. You will see a screen with a summary of the announcement you just created.
6. Click the  on this screen (upper right corner), and you will be returned to the EMA Management tab.
7. To see your recently updated announcement, click  [Refresh Announcement List](#).
8. To edit an existing announcement, click [Edit](#) next to its listing, and follow the same steps as above.

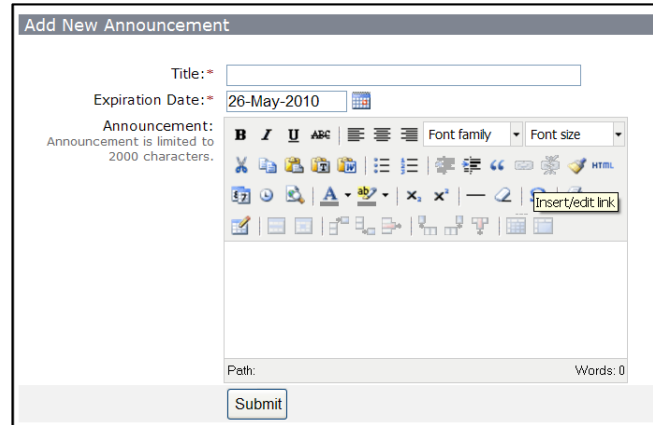
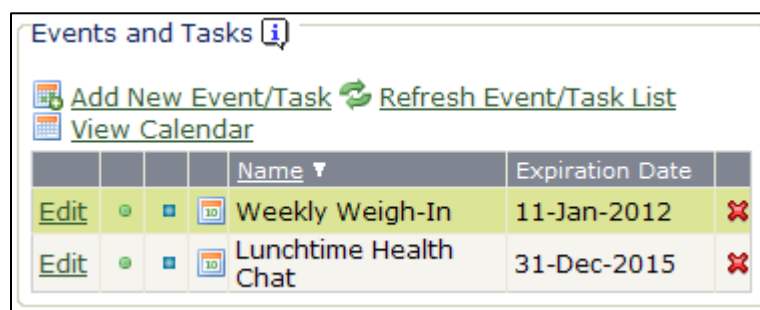


Figure 50: Add a new announcement

## Events and Tasks

Within the Portal, you may create Tasks or Events for your entire subgroup, or specific participants. The Event/Task section has four options: [Add New Event/Task](#), [Refresh Event/Task List](#), [View Calendar](#), and [Edit](#).










			Name ▼	Expiration Date	
<a href="#">Edit</a>			Weekly Weigh-In	11-Jan-2012	
<a href="#">Edit</a>			Lunchtime Health Chat	31-Dec-2015	

Figure 51: Events and Tasks

## Add or edit an Event or Task

To add a new event or task, click  [Add New Event/Task](#).

1. Add a title.
2. Indicate how often you would like this event/task to reoccur.

**Date Range:** Create a date range for your event/task to show on your participants' calendar.

**Monthly:** Create a date range for your monthly event/task to display on your participants' calendar.

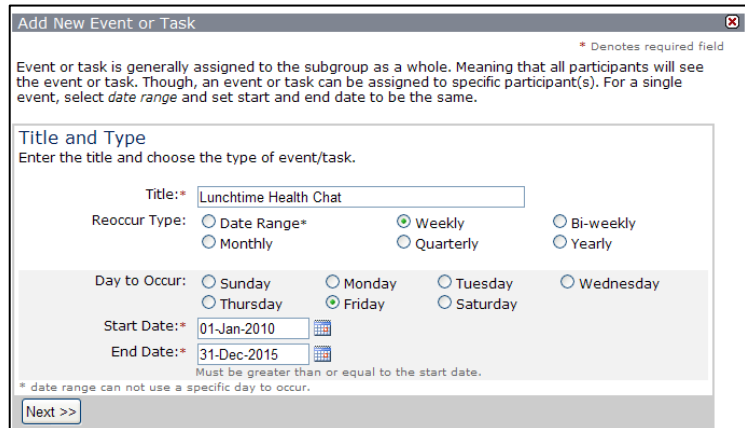
**Weekly:** Choose a day of the week the event/task will occur, and then choose a date range for the event/task to show on your participants' calendar.

**Quarterly:** Create a date range for your quarterly event/task.

**Bi-weekly:** Choose a day of the week for the event/task, and then choose a date range for the event/task to show on your participants' calendar.

**Yearly:** Create a year-long date range for your event/task to appear on the calendar.

3. Click **Next**.
4. **Trackable:** You can choose whether you will track participation in the event/task that you created. If you want to require confirmation from the participant that the event/task was completed, select Yes; otherwise, select No.
5. **Assign to All:** If you want to assign this event/task to everyone in your subgroup, select Yes. If you want to assign the event/task to only a few



**Add New Event or Task**

\* Denotes required field

Event or task is generally assigned to the subgroup as a whole. Meaning that all participants will see the event or task. Though, an event or task can be assigned to specific participant(s). For a single event, select *date range* and set start and end date to be the same.

**Title and Type**  
Enter the title and choose the type of event/task.

Title:\* Lunchtime Health Chat

Reoccur Type:  Date Range\*  Weekly  Bi-weekly  
 Monthly  Quarterly  Yearly

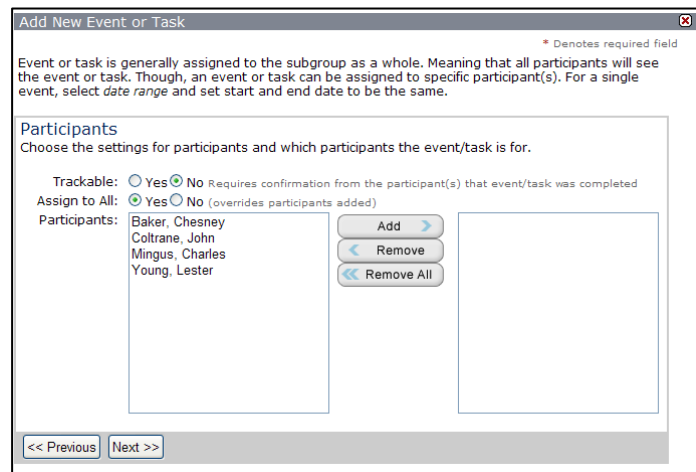
Day to Occur:  Sunday  Monday  Tuesday  Wednesday  
 Thursday  Friday  Saturday

Start Date:\* 01-Jan-2010

End Date:\* 31-Dec-2015  
 Must be greater than or equal to the start date.  
 \* date range can not use a specific day to occur.

Next >>

Figure 52: Add a New Event or Task – Steps 1 - 3



**Add New Event or Task**

\* Denotes required field

Event or task is generally assigned to the subgroup as a whole. Meaning that all participants will see the event or task. Though, an event or task can be assigned to specific participant(s). For a single event, select *date range* and set start and end date to be the same.

**Participants**  
Choose the settings for participants and which participants the event/task is for.

Trackable:  Yes  No Requires confirmation from the participant(s) that event/task was completed

Assign to All:  Yes  No (overrides participants added)

Participants: Baker, Chesney  
Coltrane, John  
Mingus, Charles  
Young, Lester

Add >

< Remove

<< Remove All

<< Previous Next >>

Figure 53: Add a new event or task - Steps 4 - 7

individuals within the subgroup, select No.

6. **Participants:** If you want to assign the event/task to certain participant(s), click the participant's name. Once it is highlighted, click **Add**.

7. Click **Next**.

8. Add a description of the event/task, using the Rich Text Editor. See page 61 for information about the Rich Text Editor toolbar.

9. Click **Finish**.

10. You will see a Summary of your Event/Task.

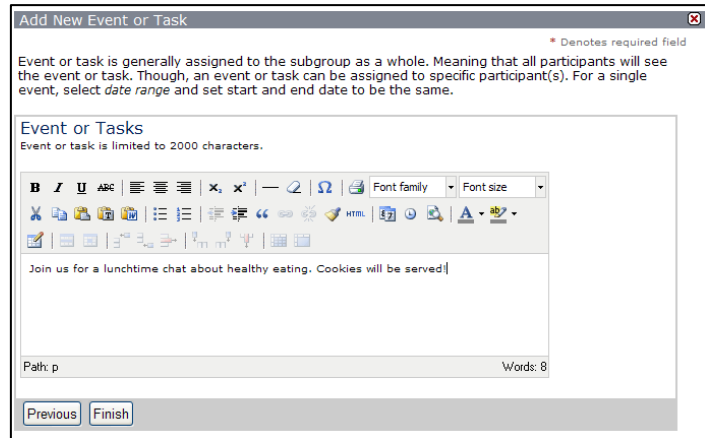



Figure 54: Add a new event of task - Steps 8 - 9

11. Click the  on the upper right corner of the screen and you will be returned to the EMA Management tab.

12. Click  [Refresh Event/Task List](#) to see your recently updated event/task.

13. To edit an existing event/task, click [Edit](#) beside the event/task you wish to edit, and follow the steps above.

### View Calendar

To view your calendar of Events/Tasks, click  [View Calendar](#).

This will bring up a screen that shows the events/tasks you have scheduled for this subgroup.

You can click the previous or next month links at the top to view events and tasks scheduled for those months.

All events scheduled for the currently displayed month are listed at the bottom of the calendar.

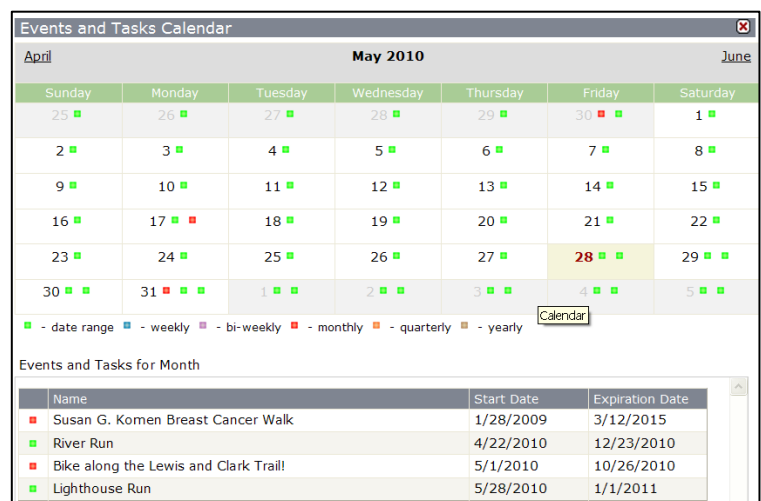
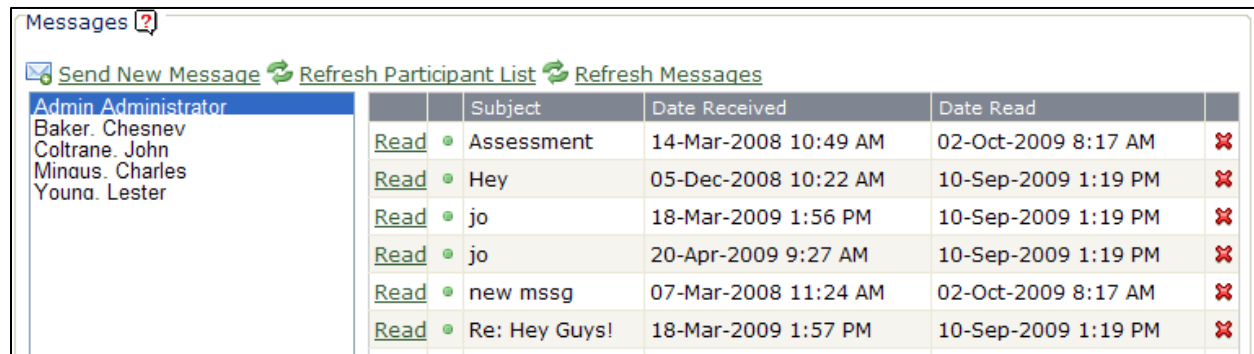


Figure 55: The Events and Tasks Calendar

## Messages




	Subject	Date Received	Date Read	
<a href="#">Read</a>	Assessment	14-Mar-2008 10:49 AM	02-Oct-2009 8:17 AM	✘
<a href="#">Read</a>	Hey	05-Dec-2008 10:22 AM	10-Sep-2009 1:19 PM	✘
<a href="#">Read</a>	jo	18-Mar-2009 1:56 PM	10-Sep-2009 1:19 PM	✘
<a href="#">Read</a>	jo	20-Apr-2009 9:27 AM	10-Sep-2009 1:19 PM	✘
<a href="#">Read</a>	new mssg	07-Mar-2008 11:24 AM	02-Oct-2009 8:17 AM	✘
<a href="#">Read</a>	Re: Hey Guys!	18-Mar-2009 1:57 PM	10-Sep-2009 1:19 PM	✘

Figure 56: Messages

The WellSuite Portal allows you to send messages to your participants and receive replies to your messages, and/or allows participants to message your administrator(s) in the system. NOTE: This messaging system does not send the message to a participant's email address; the message shows up on the participant's Home page in the Portal.

### Send a Message to Participants

Any messages sent from you to participants as well as any messages that a participant sent you will be located here.

- To send a message to one or more participants, click  [Send New Message](#).
- Subject:** Give the message a subject line.
- Send to All:** Decide who you would like this message to go to. You may choose to send an email to specific participants (e.g., those who did not attend a lunch and learn), or to all participants within this subgroup.

If you want to send the message to everyone in the subgroup, select Yes.

If you want to pick and choose who receives this message, select No.

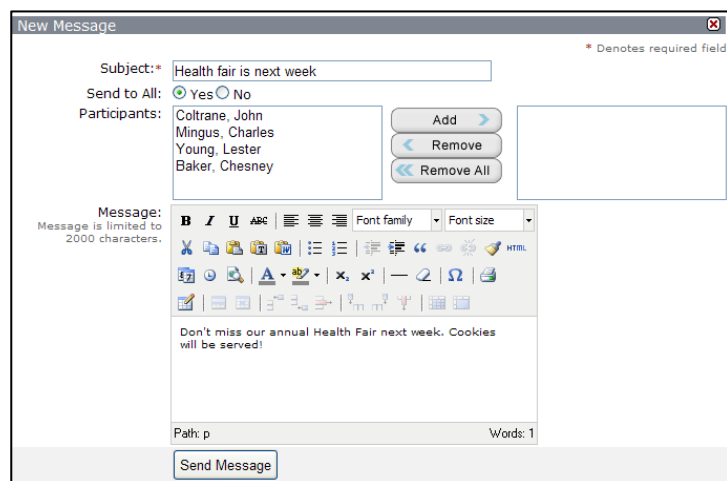



Figure 57: Send a message to participants

4. **NOTE:** If you choose multiple participants, the message will be sent to each individual participant, NOT as a group message. Therefore, the system is covered by HIPAA.
5. **Participants:** To choose an individual participant, click the name and then click **Add**.
6. Type your message using the Rich Text Editor. See page 61 for information about the Rich Text Editor toolbar.
7. Click **Send Message**.
8. You will receive a summary screen showing you that your message was sent successfully.
9. Click the  on the upper right side of the screen and you will be returned to the EMA Management tab.
10. Click the name of any participant in the Messages section, and you'll see a list of all messages you've sent that participant.



## ASSESSMENT TAB

The Assessment tab is where you will configure a number of options that will be applied to assessments for a subgroup, such as:

- How often a participant may take an assessment
- The scoring methodology to be used for this subgroup
- Which questions are required, which are optional, and which are hidden from view.

### Assessment: Frequency Sub-tab

You may allow your participants to take as many assessments as often as you wish, within the limits of your Online License. Under the Frequency sub-tab, you can choose how often assessments may be taken within a certain time period *or* the period between assessments, and how many days after an assessment is completed a participant may make corrections to the assessment.

#### 1. **When can participants take an assessment?**

##### **Only once between a start and end date:**

If you choose this option, a participant may go into the system to take an assessment *once* between your start and end date. After the time period is over, or the participant completes the assessment, he will no longer be able to access the online questionnaire.

**Figure 58: Set the frequency of assessments**

**A specific number of days after the last time they took an assessment:** You may allow your participants to take the assessment as often as you like by selecting this option: A participant may take another assessment once the specified number of days has elapsed since his last assessment.

- #### 2. **How many days after a participant has taken an assessment can it be corrected?** If you allow your participants to access their completed assessments to make changes, you may determine the number of days after the assessment is completed that the participants may go in to change information that may be incorrect. If you do not allow your participants to go in to change incorrect information, you will still have access as the administrator to go into their record and change it for them.

## Assessment: Bio Updates Sub-tab

If you are uploading biometric information for your participants, you will need to determine which assessments will be affected by the update. In general, you do not want your participant's prior assessments to be updated with their most recent biometric information.

1. Choose the start date and end date of assessments that would be affected by the most recent biometric information.

For example, if your open enrollment period was May 1, 2010 – May 31, 2010 and you conducted a blood draw on May 10<sup>th</sup>, you would choose your start date of May 1, 2010 – May 31, 2010. If a participant had an assessment from December 2009, the information in the assessment would not be current, and if you did not specify which dates the upload would go to, it may update the December 2009 assessment.

The screenshot shows the 'Bio Updates' sub-tab within the 'Assessment' section. It features a form titled 'Select date range for assessments affected by biometric updates.' The form includes two rows of date pickers: 'Start Date:\*' and 'End Date:\*'. Both rows have dropdown menus for Year (set to 2010), Month (set to May), and Day (set to 1 for start and 31 for end). A 'Save Settings' button is located below the date pickers.

**Figure 59: Biometric Update date range**

2. Click **Save Settings**.

## Assessment: Scoring Sub-tab

The scoring section determines what methodology will be used to determine a participant's risk for the different sections in the assessment. Wellsource releases the Advantage product with the most current national norms set as the default. The settings listed here are what we utilize as our default scoring methodology. We find that these settings yield the most accurate, understandable risk evaluation for Participant Reports.

1. **No correction of completed assessments:** Check this box if you do not want your participants to be able to edit their completed assessment.  
*Default:* Not selected
2. **Always import the latest participant biometrics into assessment data:** By checking this box, you will tell the system to always put the latest participant biometrics into the participants existing assessments.  
*Default:* Selected
3. **Use the Friedewald formula for calculating LDL cholesterol if no LDL cholesterol is present:** You can enter the LDL value or our application will calculate the LDL value using the Friedewald formula as long as you provide the following values: total cholesterol, HDL and a triglyceride value which is less than 400.  
*Default:* Selected



4. **Treat diabetes medication the same as having a personal history of diabetes:** In order to assess a participant's diabetes risk level, we take many items into consideration: personal history of diabetes, current use of diabetes medication, and triglyceride level. Based upon these answers, we create a risk level. By checking this box, you will tell the system to score this individual as high risk because he is taking diabetes medication.

*Default:* Selected

5. **Use ACSM Standard for Percent Fat, otherwise use basic standard:** By checking this box, you will tell the system to use The American College of Sports Medicine (ACSM) Standard for % Fat, as opposed to the national basic standard. The ACSM Standard tables are age and gender specific while the basic standard is only gender specific.

*Default:* Selected

The screenshot shows the 'Assessment' tab in the WellSuite portal administrator interface. The 'Scoring' sub-tab is active, displaying various configuration options. Key settings include:
 

- No corrections of completed assessments
- Always import the latest participant biometrics into assessment data
- Use the Friedewald formula for calculating LDL cholesterol if no LDL cholesterol is present
- Treat diabetes medication same as having a personal history of diabetes
- Use ACSM Standard for Percent Fat, otherwise use basic standard
- Force high risk if personal history of DM or CHD present, and include the following:
  - Stroke or restricted blood flow to head or legs
- If Family History of CHD then multiply Framingham score by
- If there are three or more risk factors for Metabolic Syndrome then multiply Coronary Risk:
  - Male:
  - Female:
- Disable Coronary Risk one point reduction for HDL level of  or greater.
- Replace grams with cups for recommended grains, veg, fruit, and protein (Metric only)

 Under 'GXT Test Selection', '1 Mile Walk (Default)' is selected. Under 'Priority Options', 'Body Mass Index (default if unable to compute other selection)' is selected. A 'Save Settings' button is located at the bottom left of the configuration area.

Figure 60: Assessment scoring options

**For items 6a through 9, you should use the Wellsource defaults unless your medical or nursing director desires to change them.**

6. **Force High Risk if personal history of DM (diabetes mellitus) or CHD (coronary heart disease) is present, and include the following:** By checking this box, you are telling the system that if a participant indicates that he is taking diabetes medication, or has a personal history of coronary heart disease, then the system MUST force them to be high risk, no matter what the scoring indicates for their heart disease risk.

*Default:* Selected

- a. **Stroke or restricted blood flow for legs:**

*Default:* Selected

7. **If family history of CHD then multiply Framingham Score by**  :

*Default:* Not selected

8. **If there are three or more risk factors for Metabolic Syndrome, then multiply Coronary Risk by:**

*Default:* Not selected

- a. Male:
- b. Female:

9. **Disable Coronary Risk one point reduction for HDL level of  or greater:**

*Default:* Not Selected

10. **Replace grams with cups for recommended grains, veg, fruit, and protein (Metric only.)**

*Default:* Not selected

11. **GXT Test Selection:**

- a. **1 Mile Walk:** Our application will default to using the 1 mile walk for the exercise test. The participants' test heart rate and completion time values must be entered in their assessments.
- b. **Step Fit:** If you choose to use the StepFit step test then you must also require the following questions to be answered: Physical Activity Status and Time Spent Exercising Each Week. See *Assessment: Questions* on page 54 for information on how to require that questions be answered.
- c. **1.5 Mile Run:** If you choose to use the 1.5 mile run, you will need to check this box and enter the completion time.

Please refer to the *Fitness Testing Manual* for these test protocols.

12. **Priority Options:**

- a. **Body Mass Index:** The BMI calculation will be used in our scoring algorithms. When BMI is checked it will be displayed first on the Weight page of the individual report. You can choose to display waist girth or Percent Fat if you desire.
- b. **Waist Girth**
- c. **Percent Fat**

When you have completed your Scoring configuration, click **Save Settings**.

## Assessment: Metabolic Risk Sub-tab

The default metabolic risk factor cut-points are based on governmental and other reputable agencies.

Reference: [http://www.nhlbi.nih.gov/health/dci/Diseases/ms/ms\\_diagnosis.html](http://www.nhlbi.nih.gov/health/dci/Diseases/ms/ms_diagnosis.html)

While you can edit these values, you should accept our defaults unless your medical or nursing director advises you to change them. If you choose, you can change these defaults in this sub-tab.

**NOTE:** The screen displays Standard (U.S.) measurements and will automatically adjust for metric. Changes made will only be reflected in new assessments or recalculation of existing assessments.

### Default Values:

#### Waist Girth:

Male: 40  
Female: 35

**Triglyceride:** 150

#### HDL Cholesterol:

Male: 40  
Female: 50

**Fasting Glucose:** 100

#### Blood Pressure:

Systolic: 130  
Diastolic: 85

#### Don't include the following:

Personal History of High Blood Pressure	<i>Not selected</i>
Blood Pressure Medication	<i>Not selected</i>
Personal History of Diabetes	<i>Not selected</i>
Diabetes Medication	<i>Not selected</i>

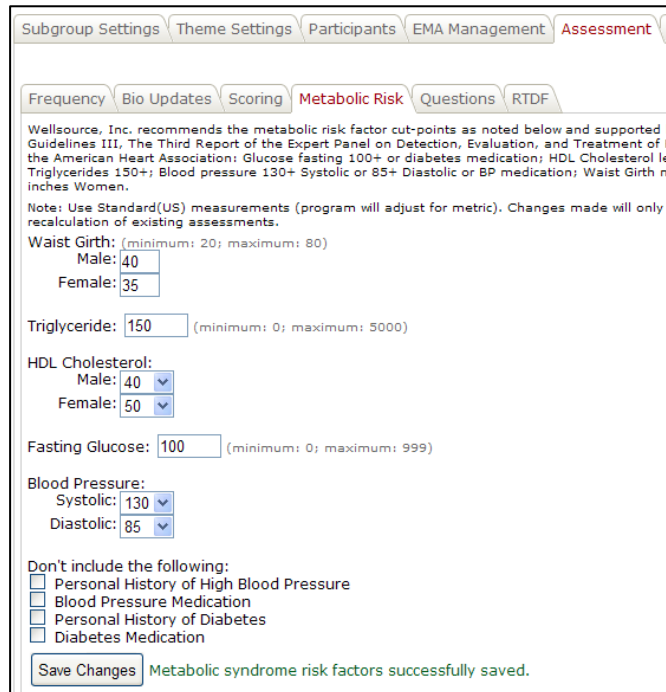


Figure 61: Metabolic Risk Factor cut-points

## Assessment: Questions Sub-tab

This sub-tab controls which questions your participants will see on the assessment questionnaire, and whether they are required to answer them or not. The questions are abbreviated in this list for readability and simplicity.

**Always Required:** The PWP Advantage program requires that certain questions must be answered in order to complete an assessment. These questions are labeled “Always Required.” and cannot be reconfigured.

Most questions on the assessment questionnaire have one or two options:

**Displayed but not required:** The question is shown in the questionnaire, but the participant is not required to answer it.

**Required:** The participant must answer the question or the assessment will not be considered complete.

**Hidden:** The question will not be shown on the assessment questionnaire.

## Assessment: RTDF Sub-tab

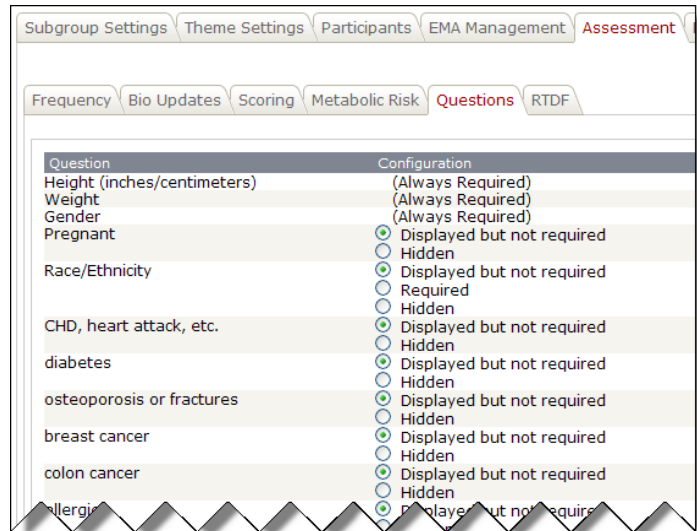


Figure 62: Assessment questions configuration

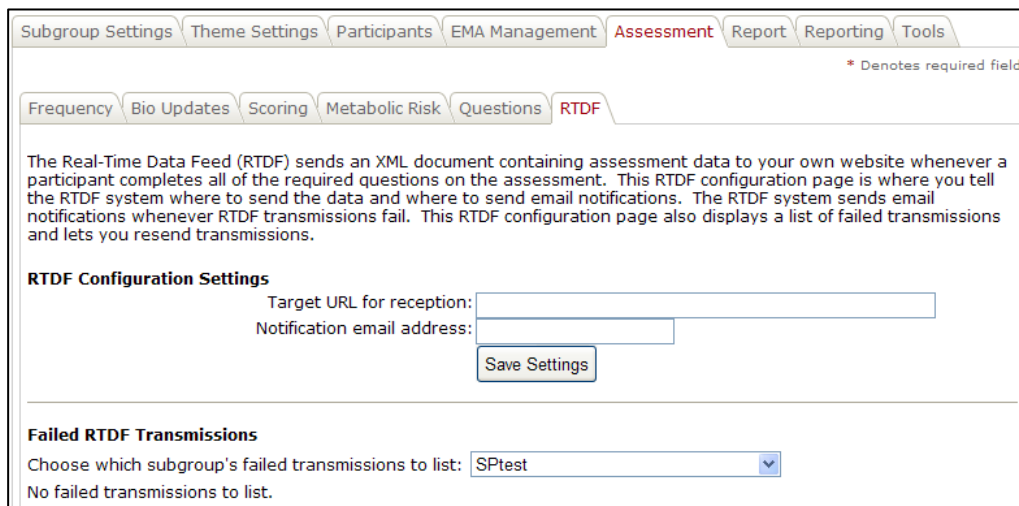
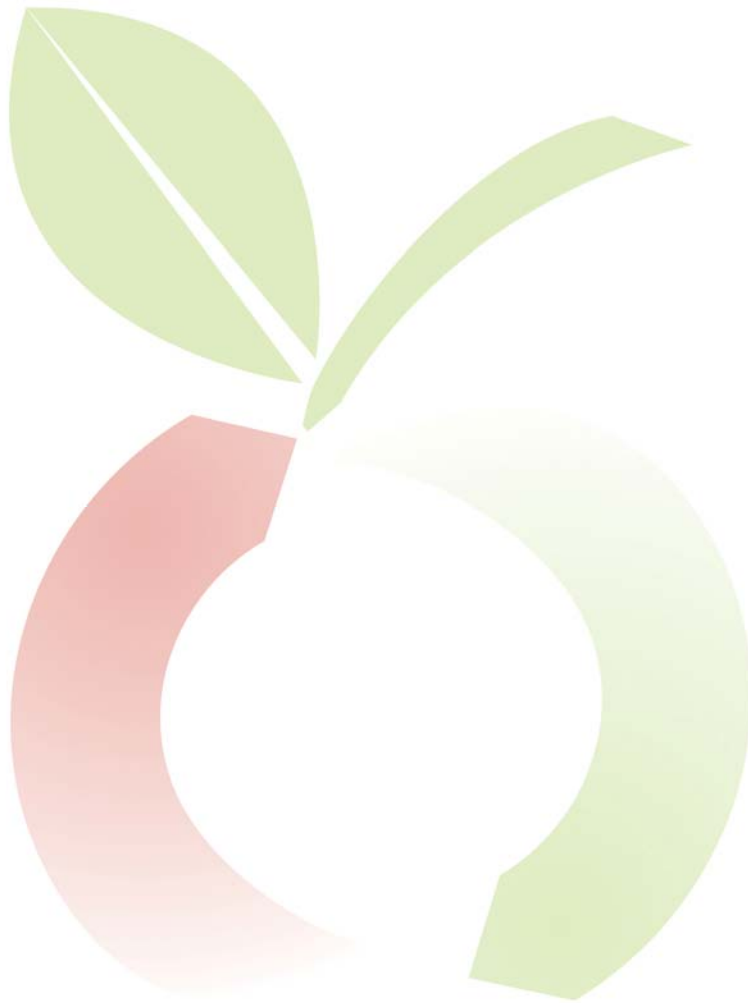


Figure 63: Real-Time Data Feed configuration

The Real-Time Data Feed (RTDF) is an add-on feature to your online Advantage program. If you are interested in learning more about this feature, please contact your sales representative.

RTDF sends an XML document containing assessment data to your own website whenever a participant completes all of the required questions on the assessment. This RTDF configuration page is where you tell the RTDF system where to send the data and where to send email notifications. The RTDF system sends email notifications whenever RTDF transmissions fail. This RTDF configuration page also displays a list of failed transmissions and lets you resend transmissions.

- **Target URL for reception:** Must be a valid Internet-accessible URL, where the RTDF assessment data will be sent.
- **Notification email address:** If transmission of the RTDF data fails, a notification will be sent to this email address.
- **Failed RTDF Transmissions:** You may view a log of all failed RTDF transmission for any subgroup, or for all subgroups. Select the subgroup from the drop-down list.



## REPORT TAB

---

Participants' reports are largely generated automatically, but there are some sections of the reports that can be configured by the administrator in this tab, including

- *Making Lifestyle Changes & Resources for Making Lifestyle Changes* on the Next Steps page
- *Report Sponsor Phrases* on the Cover page
- *Customer Links*
- *A Welcome Message*
- *An Exit Message*
- *Counselor Notes* on the first page of the personal report

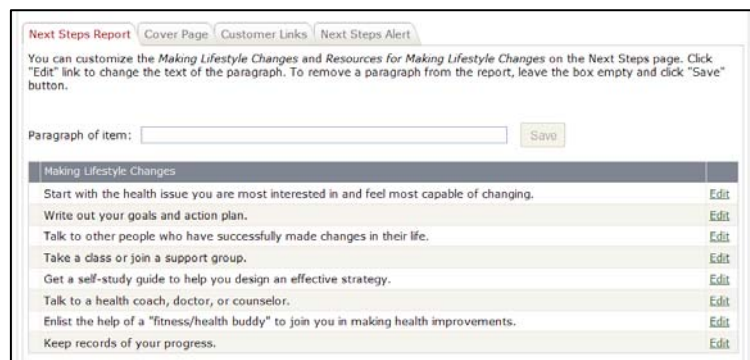
### **Report: Next Steps Report Sub-tab**

#### ***Making Lifestyle Changes***

Within the PWP Personal Report, the system will allow you to list some Lifestyle Changes for your participant (e.g., "Write out your goals and action plan.") This sub-tab allows you to provide your participant with some ideas of ways he can change their health slowly. These are simply brief text paragraphs that you can edit or delete.

#### **Edit or delete a Lifestyle Changes item**

1. Click [Edit](#) next to the item you would like to edit.
2. The current language will show in your "Paragraph of item" viewer. Edit as needed.
3. If you would like to delete the item completely, simply delete all of the text.
4. Click **Save**.



**Figure 64: Edit Lifestyle Changes items**

## **Report: Report Settings Sub-tab**

This section enables you to create up to three lines of custom information on the cover page of the PWP Personal Report, such as who is providing the report and contact information. This is often used to identify the sponsoring company or agency, but you may use it for any purpose

The screenshot shows the 'Report Settings' sub-tab. It includes a navigation bar with tabs: Subgroup Settings, Theme Settings, Participants, EMA Management, Assessment, and Report. Below this, there are sub-tabs: Next Steps Report, Report Settings (selected), Customer Links, Next Steps Alert, and Counselor Notes. The main content area contains the following text:

- You can change the *report sponsor phrases* on the cover page. Change the text of three sponsor phrase from the report, leave the box empty and click "Save" button.
- If the additional question responses need to be shown on the individual report, check the checkbox.

Sponsor Phrases for Report:

Phrase 1:	Wellsource, Inc.
Phrase 2:	15431 Southeast 82nd Drive
Phrase 3:	Clackamas, OR 97015

Additional Questions:

Add additional question response to individual report?

**Figure 65: The Report Settings sub-tab**

### ***Adding or editing Sponsor Phrases for the Personal Report***

- Simply add, edit or delete the text in the boxes for any or all of the three Sponsor Phrases – Phrase 1, Phrase 2, or Phrase 3.
- Click **Save**.

### ***Printing responses to additional questions on the Personal Report***

You may have had your system configured to ask the participant a number of additional questions beyond the standard Wellsource HRA questions on your Assessment Questionnaire. If so, you can print the participant's responses on his personal report.

- Select the checkbox labeled "Add additional question response to individual report?"
- Click **Save**.

## **Report: Customer Links Sub-tab**

PWP Advantage links to a rich online library of articles, the **LifeChange Library™**, within the program. The LifeChange Library contains various articles relating to health risks assessed by the PWP Advantage program, and provides information on what a participant may do to lower or overcome those risks. When a participant views their PWP Personal Report online, the report contains links to the LifeChange Library that the participant may click to be directed to an article.

As the administrator, you may change these links to direct the participant elsewhere. For example, if you wanted the participant to visit the American Heart Association (AHA) website for information on Coronary Risk, you would change the name of the link, and change the URL to direct them to the AHA website.



\* Denotes required field

Next Steps Report Report Settings **Customer Links** Next Steps Alert Counselor Notes

You can replace the LifeChange Library™ Resource Link on each report with a link of your choosing. To do this, click on the "Edit" link to the right of "LifeChange Library™" for the report link you would like to change. The current text will appear in the box below. Type the new text (a title or brief phrase) and click Save. You will receive a message indicating your change has been successful. Next, click on the "Edit" link beside the URL. The URL will appear in the box below. Type the new URL and click Save. You will receive a message indicating your change has been successful.

Text to edit:

Report Name	Customer Text or URL	
Cancer Risk	LifeChange Library™	<a href="#">Edit</a>
Cancer Risk	http://wellsorce.info/secure/	<a href="#">Edit</a>
Coronary Risk	American Heart Association Website	<a href="#">Edit</a>
Coronary Risk	http://www.heart.org/HEARTORG/	<a href="#">Edit</a>
Diabetes	LifeChange Library™	<a href="#">Edit</a>

Figure 66: The Customer Links sub-tab

### *Changing the Customer Links*

To change the text that will appear on the Personal Report:

1. Click [Edit](#) next to the name or web address (URL) you want to edit. Notice that there are *two* entries for each Report Name; the first entry is for the label that will appear on the report, and the second entry is for the URL.
2. The current language will show in your "Text to Edit" box. Edit as needed. If you are editing a URL, it must start with "http://" or "https://".
3. Click **Save**.

## **Report: Next Steps Alert Sub-tab**

You have the option to supply a nicely formatted **Welcome Message** that overlays the first page that the participant sees when he goes to view his individual report.


You also have the option to display an **Exit Message** if the participant does NOT choose to view the *Next Steps* page. This message will be displayed when the participant tries to leave the individual report.

You may enter up to 2,000 characters per message.

**Figure 67: The Welcome/Exit Message Editors**

### ***Adding a Welcome Message or Exit Message to the Personal Report***
































1. You can easily enter or edit your Welcome or Exit Message using the built-in Rich Text editor. You can edit font attributes, create tables, and do other formatting as needed using the built-in editing tools, which are similar to those in a word processing program. See *The Rich Text editor toolbar* on page 61 for a list of individual editing tools.

If you are familiar with HTML coding, you can click the  **Source** button to open a text editor where you may enter HTML code directly.

2. If you want the Welcome or Exit message to show when a participant views their report, check the “Display welcome/exit message” box for each message desired.
3. You may choose which page of the Personal Report a participant views first by choosing the page from the “First page to display” dropdown box.
4. Click **Save**.

### The Rich Text editor toolbar



	Make selected text <b>boldface</b>		Create a numbered list
	Make selected text <i>italic</i>		Create a bulleted list
	Make selected text <u>underlined</u>		Outdent (move left) selected text
	Make selected text <del>strikethrough</del>		Indent (move right) selected text
	Make selected text <sub>subscript</sub>		Left-justify selected text (ragged right)
	Make selected text <sup>superscript</sup>		Center selected text
	Make selected text into a <a href="#">hyperlink</a>		Right-justify selected text (ragged left)
	Remove hyperlink from selected text		Full-justify selected text
	Create a table		Create a horizontal line
	Insert special characters, like ® or ñ		Change the <b>color</b> of selected text
	Undo last action		Change the <b>background color</b> of text
	Re-do last undone action		Select all text
	Find text (search)		Remove formatting from selected text
	Replace text		Paste
	Paste as plain text		Paste from MS-Word
Format <input type="text"/>	Set HTML style of selected text, such as Heading 1, Heading 2, etc		
Font <input type="text" value="Arial"/>	Set font of selected text		
Size <input type="text"/>	Set the font size of selected text		
 Source	Edit HTML directly		

## Report: Counselor Notes Sub-tab

In this sub-tab, a Counselor may review a participant's assessment and enter notes that may be helpful to the participant, based on the assessment results. Counselor notes appear on the front page of the personal report.

Subgroup Settings Theme Settings Participants EMA Management Assessment **Report** Reporting Tools

\* Denotes required field

Next Steps Report Report Settings Customer Links Next Steps Alert **Counselor Notes**

Assessment Counselor Notes

- Counselor notes are assigned per assessment per individual giving the ability to identify and counsel the areas of highest concerns to a participant. To start find the participant and the assessment to set the counselor notes for. If any counselor notes pre-exist for an assessment you'll be able to make changes or add additional notes.
- Counselor notes appear on the front page of the personal report. You may also view the participant report after selecting the assessment and clicking on the link *View Personal Report*.

Find by: A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z [View All](#)

Assessment(s):\* Baker, Chesney (chetb) (14-Jul-2010) ▼

Counselor Notes:\*  
Max characters: 500

Good work keeping your cholesterol under control since the last assessment!

Save

**Figure 68: Counselor Notes**

1. To start, find the participant using the alphabetical buttons for the last name, or **View All**.
2. Select an assessment from the drop-down list. If any counselor notes pre-exist for this assessment you'll be able to make changes or add additional notes.
3. Click **Save** when you are done.



# REPORTING TAB

## Reporting: Participant Sub-tab

Four participant reports are available to administrators: **Personal**, **Personal with Trend\***, **Trend**, and **Counselor Summary**.

\*NOTE: **Personal with Trend** has not been released as of the date of publication of this manual.

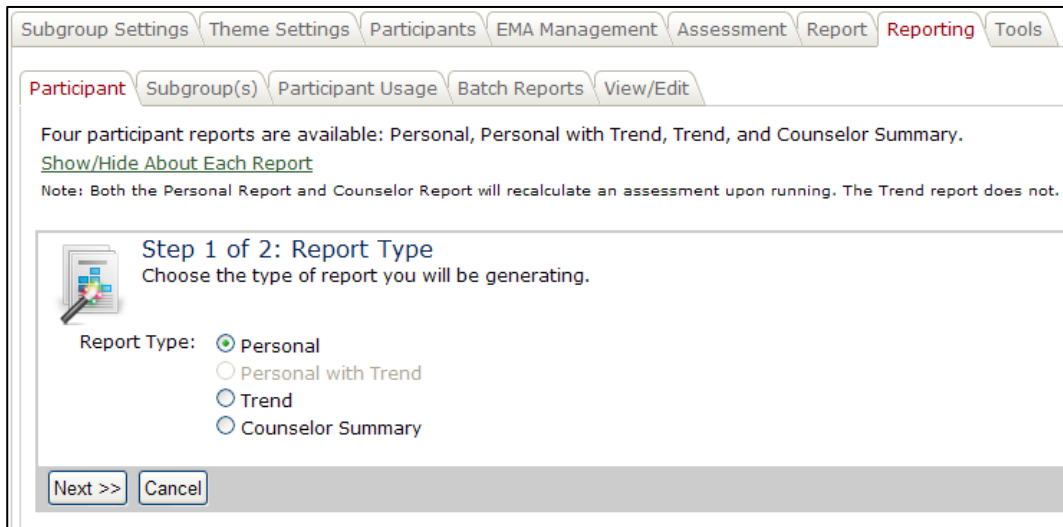


Figure 69: Participant Reports

### *Create an individual Personal Report*

1. Select Report Type:  
*Personal*
2. Click **Next**.
3. To start, find the participant using the alphabetical buttons for the last name, or **View All**.
4. Select the participant from the drop-down menu.
5. Click **Finish**.

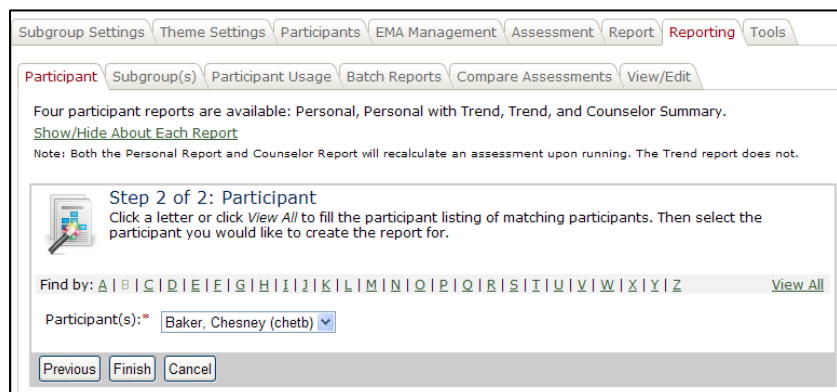
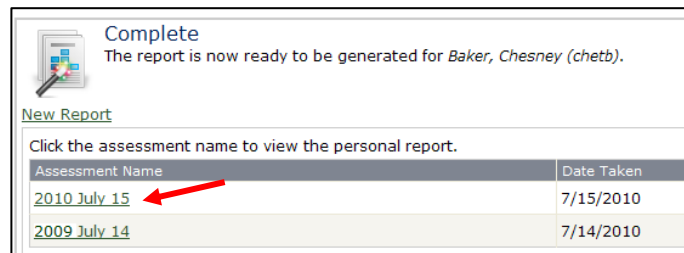
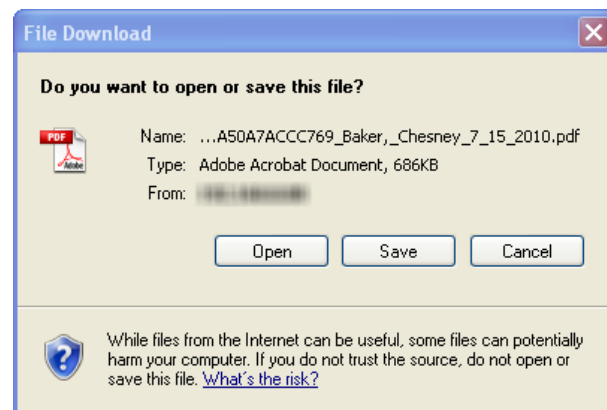


Figure 70: Find a Participant for an individual report

6. You'll see a list of completed assessments for this participant. Choose the assessment you would like to report on. In most cases, you'll want to select the most current.
7. Click the assessment link.
8. You will receive a "File Download" dialog.
9. Choose to **Open** or **Save** the report to your computer's hard drive or network drive.



**Figure 72: Select an Assessment for an individual report**



**Figure 72: File Download dialog**

## Create a Trend Report

1. Select Report Type: *Trend*
2. Click **Next**.
3. To start, find the participant using the alphabetical buttons for the last name, or **View All**.
4. Select the participant from the drop-down menu.
5. Choose which Wellness Indicators you would like included on the Participant's Trend Report. By default, *all* are selected; uncheck the indicators you want to exclude.

**Step 3 of 3: Wellness Indicators or Sections**  
 Uncheck the wellness indicators or sections you would like to *not* include on the report.

Wellness Indicators to Include:

<input checked="" type="checkbox"/> Overall Wellness Score	<input checked="" type="checkbox"/> Overall Health Perceptions	<input checked="" type="checkbox"/> Coronary Risks
<input checked="" type="checkbox"/> Cancer Risks	<input checked="" type="checkbox"/> Diabetes Risks	<input checked="" type="checkbox"/> Osteoporosis Risks
<input checked="" type="checkbox"/> Good Eating Indicators	<input checked="" type="checkbox"/> Aerobic Fitness	<input checked="" type="checkbox"/> Stress Indicators
<input checked="" type="checkbox"/> Good Safety Factors	<input checked="" type="checkbox"/> Smoking	<input checked="" type="checkbox"/> Alcohol Intake
<input checked="" type="checkbox"/> Weight (Self & Clinical)	<input checked="" type="checkbox"/> BMI	<input checked="" type="checkbox"/> Waist Girth
<input checked="" type="checkbox"/> Percent Body Fat	<input checked="" type="checkbox"/> Blood Pressure	<input checked="" type="checkbox"/> Total Cholesterol
<input checked="" type="checkbox"/> Non-HDL Cholesterol	<input checked="" type="checkbox"/> LDL Cholesterol	<input checked="" type="checkbox"/> HDL Cholesterol
<input checked="" type="checkbox"/> Triglycerides	<input checked="" type="checkbox"/> Glucose	<input checked="" type="checkbox"/> HbA1c
<input checked="" type="checkbox"/> Aerobic Capacity (METS)	<input checked="" type="checkbox"/> Grip Strength	<input checked="" type="checkbox"/> Flexibility
<input checked="" type="checkbox"/> Curl-ups	<input checked="" type="checkbox"/> Push-ups	<input checked="" type="checkbox"/> Sick Days
<input checked="" type="checkbox"/> High Risk Factors	<input checked="" type="checkbox"/> Chronic Health Problems	

Previous Finish Cancel

**Figure 73: Select Wellness Indicators for Trend Report**

6. Click **Finish**.
7. Your Participant's Trend Report will open in a new window. You may print the report or export it to a PDF file using the buttons at the top of the report.

## Create a Counselor Summary Report

1. Select Report Type: *Counselor Summary*
2. Click **Next**.
3. To start, find the participant using the alphabetical buttons for the last name, or **View All**.

- Select the participant from the drop-down menu.
- Choose which Wellness Indicators you would like included on the Participant's Counselor Summary Report. By default, *all* are selected; uncheck the indicators you want to exclude.

**Step 3 of 3: Wellness Indicators or Sections**  
Uncheck the wellness indicators or sections you would like to *not* include on the report.

Sections to Include:

<input checked="" type="checkbox"/> Clinical Test Results	<input checked="" type="checkbox"/> Self-Reported Results	<input checked="" type="checkbox"/> Health Age Summary
<input checked="" type="checkbox"/> Health Information	<input checked="" type="checkbox"/> Medical Care	<input checked="" type="checkbox"/> Coronary Risk Factors
<input checked="" type="checkbox"/> Cancer Risk Factors	<input checked="" type="checkbox"/> Diabetes Risk Factors	<input checked="" type="checkbox"/> Osteoporosis Risk Factors
<input checked="" type="checkbox"/> Nutrition & Eating Summary	<input checked="" type="checkbox"/> Substance Use	<input checked="" type="checkbox"/> Fitness
<input checked="" type="checkbox"/> Stress & Coping	<input checked="" type="checkbox"/> Safety	<input checked="" type="checkbox"/> Weight Management
<input checked="" type="checkbox"/> Medical Follow-up	<input checked="" type="checkbox"/> Readiness to Change	<input checked="" type="checkbox"/> Health Interests

Previous Finish Cancel

**Figure 74: Select Wellness Indicators for Counselor Summary Report**

- Click **Finish**.
- Your participant's Counselor Report will open in a new window. You may print the report or export it to a PDF file using the buttons at the top of the report.

## **Reporting: Subgroup(s) Sub-tab**

There are two different subgroup reports you may create; the **Detail Report**, and the **Summary Report**. The Detail Reports gives you the option to run a report by choosing Wellness Indicators as well as a date range. The Summary Report does not offer those options.

You may run reports on a single subgroup or on a combined aggregate of two or more subgroups.

**NOTE:** These reports are delivered to your PC as “pop-ups,” so you may have to temporarily disable any pop-up blockers in your web browser to view the reports.

### ***Create a Subgroup Detail Report***

- Select Report Type: *Detail*
- Click **Next**.

Subgroup Settings | Theme Settings | Participants | EMA Management | Assessment | Report | **Reporting** | Tools

Participant | Subgroup(s) | Participant Usage | Batch Reports | Compare Assessments

Two subgroup reports are available: Detail and Summary. Both subgroup reports give the number and percentage of responses to specific questions on the assessment. Each report can contain one or many subgroups. There is also an option to only use the latest assessment from each individual. The differences between the Detail and Summary are:

[Show/Hide About Each Report](#)

- The Detail report lists a great number of results, including demographics and health risks. The Detail report also offers a date range and an option to show specific wellness (quality-of-life) indicators and has 4 steps.
- The Summary report only lists items from the questionnaire and has 3 steps.

**Step 1 of 4: Report Type**  
Choose the type of report you will be generating

Report Type:

Detail (includes date range and wellness indicators to include)

Summary

Next >> Cancel

**Figure 75: Subgroup Detail Report - Step 1**



3. Choose the subgroup(s) you wish to include on the report.

4. Click **Next**.

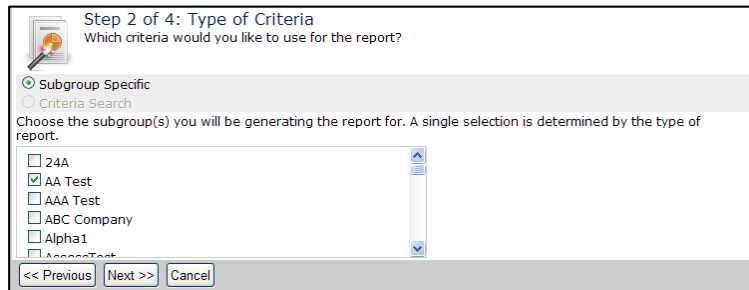


Figure 76: Subgroup Detail Report - Step 2

5. Choose which Wellness Indicators you would like included on the Subgroup Detail Report. By default, all are selected; uncheck the indicators you want to exclude.

6. Click **Next**.



Figure 77: Subgroup Detail Report - Step 3

7. Choose the date range for your report.

8. There is also an option to *only* use the latest assessment from each individual. Select the checkbox next to “Would you like to include the most current assessment for each person?” If you want to use only the most recent assessment data.

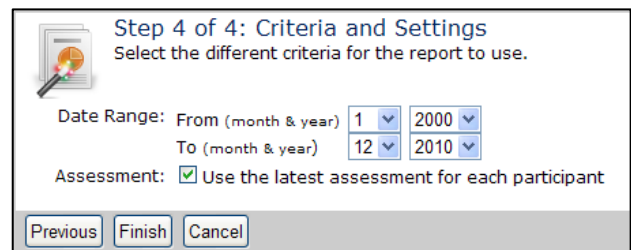


Figure 78: Subgroup Detail Report - Step 4

9. Click **Finish**.

10. Your Detail Report will show in a new “pop-up” window.

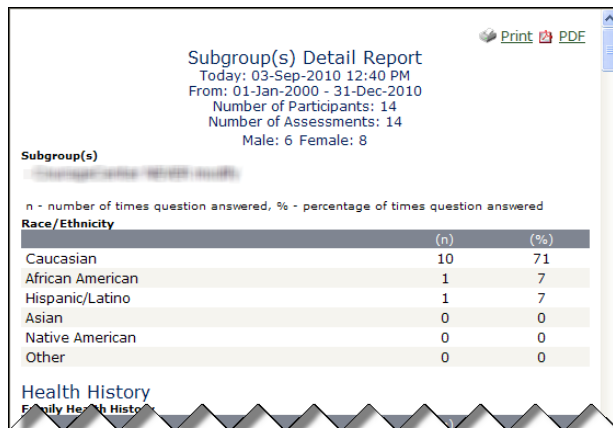


Figure 79: A Subgroup Detail Report

## Create a Subgroup Summary Report

Running a Subgroup Summary Report is nearly identical to the running a Subgroup Detail Report, as described on page 66, except that you cannot exclude any Wellness Indicators or set a date range.

1. Select Report Type: *Summary*
2. Click **Next**.
3. Choose the subgroup(s) you wish to include on the report.
4. Click **Next**.
5. Select the checkbox next to “Would you like to include the most current assessment for each person?” If you want to use only the most recent assessment data.
6. Click **Finish**.
7. Your Detail Report will show in a new “pop-up” window.

## Reporting: Participant Usage Sub-tab

This sub-tab gives you a quick snapshot of your portal usage, by subgroup.

### *View the Participant Usage Report*

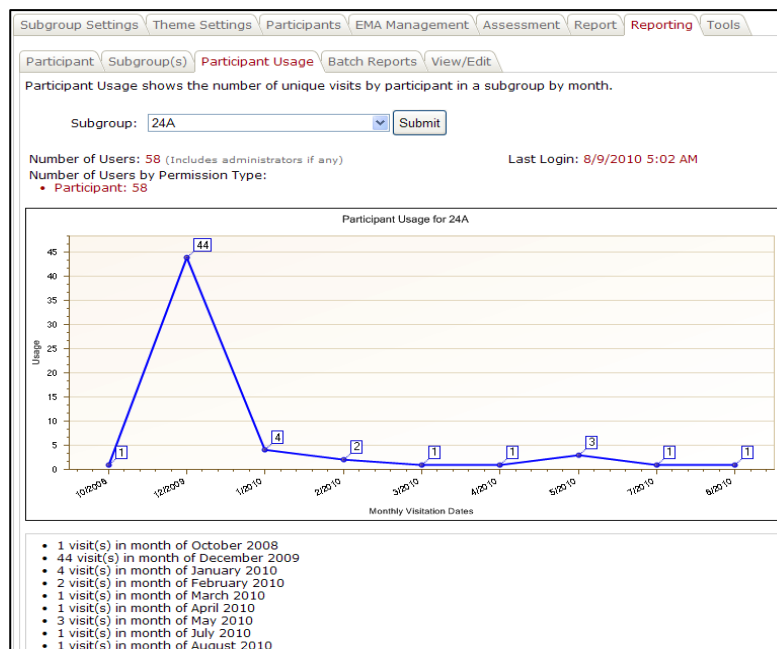


Figure 80: The Participant Usage Report

1. Choose the subgroup for which you want to view usage from the drop-down list.
2. Click **Submit**.
3. The report will show you the following information:
  - a. Number of users in subgroup.
  - b. Number of users by permission type.
  - c. Number of participants who logged in during each time period.

## **Reporting: Batch Reports Sub-tab**

A number of reports can be created in batches, for an entire subgroup—or in some cases multiple subgroups—at once. The reports are generated in the background, put into a compressed (.zip) file, and you'll receive an email notice when the batch report file is ready for you to download.

You may view a list of reports that are ready to download at any time, by clicking [View Reports Available for Download](#). A wizard assists you in creating each report.

**Step 1** of the wizard is identical for each of the five types of batch reports. You'll start by selecting the type of batch report you want. The subsequent steps differ according to which type of batch report you select. Your choices of batch report type are:

- a. Personal
- b. Counselor Summary
- c. Productivity and Economic Benefits Report (PEBR)
- d. Executive Summary Report
- e. Detail List Report

Subgroup Settings Theme Settings Participants EMA Management Assessment Report **Reporting** Tools

Participant Subgroup(s) Participant Usage **Batch Reports** View/Edit

- [Create a New Report](#) - [View Reports Available for Download](#)

**Create a New Report**

Batch Reports allows the choosing of a specific report type that generates a Zip file containing all the results. Follow the steps below to generate your report. Your permission level will determine which subgroups you will see.

Note: Batch reports are automatically removed after 7 days from the time they were created.

**Step 1 of 4: Report Type**  
Choose the report you will be doing a batch report for.

Personal  
 Counselor Summary  
 Productivity and Economic Benefits Report (PEBR)  
 Executive Summary Report  
 Detail List Report

[Next >>](#) [Cancel](#)

**Figure 81: Step 1 for All Batch Reports**

## Create a Batch of Personal Reports

1. In **Step 1** of the wizard, select *Personal* as the type of batch report you want to create.
2. In **Step 2** of the wizard, choose the subgroup for which you want to create Personal Reports.
3. Click **Next**.

**Figure 82: Batch Personal Reports - Step 2**

4. In **Step 3** of the wizard, create a name for your report. Note that the name cannot contain any special characters, as noted in the dialog.
5. Click **Next**.

**Figure 83: Batch Personal Reports - Step 3**

6. In **Step 4** of the wizard, select the report start and end date. This will consist of the month and year—no day is required.
7. If you would you like the report to use *only* the most recent assessment for each participant, select “Use the latest assessment for each participant.”
8. You may choose to print only selected pages from each personal report. Select *All*, or enter your specific page selections.

**Figure 84: Batch Personal Reports - Step 4**

9. Enter your email address. The system will email you at this address when the report is completed and ready for you to download.
10. Click **Finish**.

## Create a Batch of Counselor Summary Reports

1. In **Step 1** of the wizard, select *Counselor Summary* as the type of batch report you want to create.
2. In **Step 2** of the wizard, choose the subgroup for which you want to create Personal Reports.

3. In **Step 3** of the wizard, create a name for your report. Note that the name cannot contain any special characters, as noted in the dialog.

**Figure 85: Batch Counselor Summary Reports – Step 3**

4. In **Step 4** of the wizard, select the report start and end date. This will consist of the month and year—no day is required.

5. Select which sections of the Counselor Report to include. By default, all are included.

**Figure 86: Batch Counselor Summary Reports - Step 4**

6. Enter your email address. The system will email you when the report is completed.

7. Click **Finish**.

## Create a Productivity and Economic Benefits Reports (PEBR)

The Productivity and Economic Benefits Report (PEBR) is a forward-looking report which shows the projected economic benefit of reaching wellness goals. To use this report effectively, you will need to have two important figures available:

- The average hourly wage for employees in the subgroup(s) you will be reporting on.
- The amount of the average total medical claims per employee, for the most recent full year.

1. In **Step 1** of the wizard, select *Productivity and Economic Benefits Report (PEBR)* as the type of batch report you want to create.

- In **Step 2** of the wizard, choose the subgroups for which you want to create Personal Reports. You may select one subgroup or multiple subgroups.

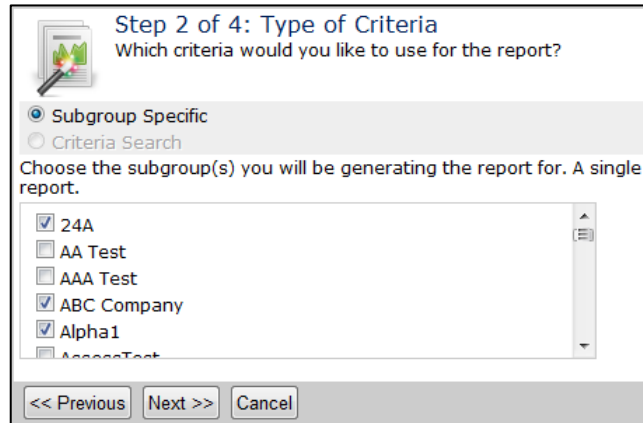


Figure 87: PEBR - Step 2

- In **Step 3** of the wizard, create a name for the report. Note that the name cannot contain any special characters, as noted in the dialog.
- Optionally, you may create a report footer; this can be any text of your choice. Many administrators use this area to identify the sponsoring organization. This area may contain special characters such as ® or ©.

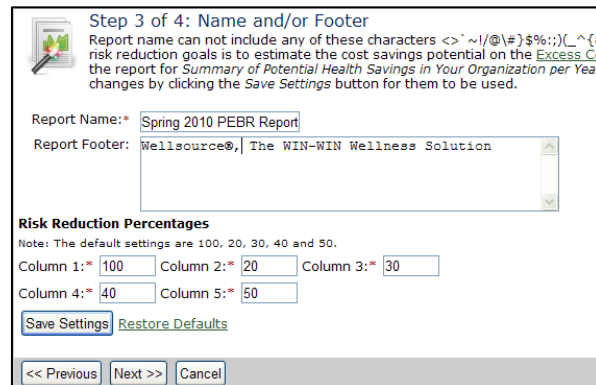


Figure 88: PEBR - Step 3

- Set your risk reduction percentages. These are percentages of risk reduction goals that are used to estimate cost savings over a year, if met. You can accept these percentage levels for your report or modify them. If, for example, you wanted to estimate the cost savings for a more modest goal of 10%, you could edit the value for **Column 2** to be 10.
- Click **Save Settings** to save any modifications you've made to the risk reduction percentages, and then click **Next**.

- In **Step 4** of the wizard, choose the date range for your report. The report will use *only* the most recent assessments within the date range.
- Enter the average hourly wage for employees within the subgroup(s).
- Enter the average medical claims per employee per year, for the most recent year.

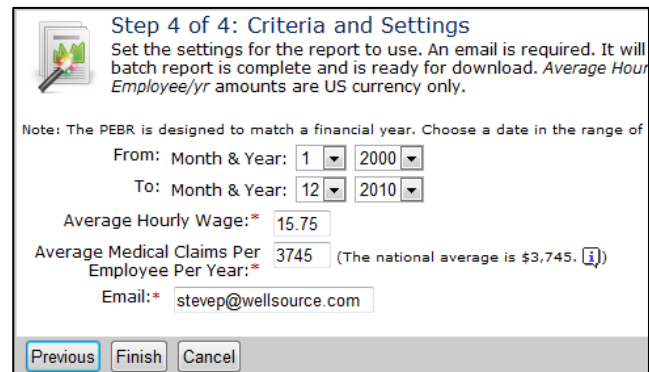


Figure 89: PEBR - Step 4

10. Enter your email address. The system will email you when the report is completed.
11. Click **Finish**.

### Create an Executive Summary Report

1. In **Step 1** of the wizard, select *Executive Summary Report* as the type of batch report you want to create.
2. In **Step 2** of the wizard, choose the subgroups for which you want to create Personal Reports. You may select one subgroup or multiple subgroups.

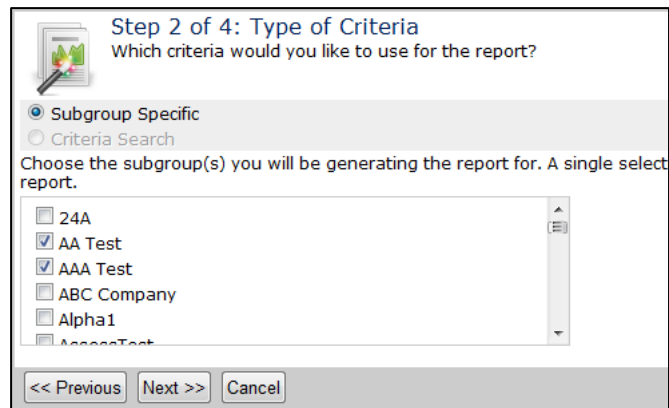


Figure 90: Executive Summary - Step 2

3. In **Step 3** of the wizard, create a name for the report. Note that the name cannot contain any special characters, as noted in the dialog.

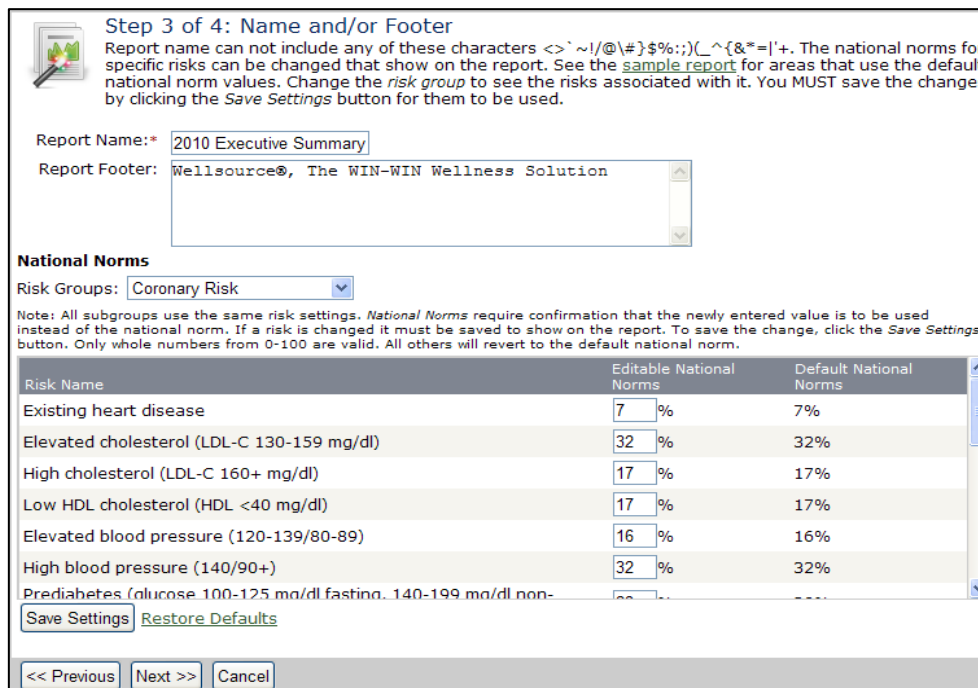


Figure 91: Executive Summary Report - Step 3

4. Optionally, you may create a report footer; this can be any text of your choice. Many administrators use this area to identify the sponsoring organization. This area may contain special characters such as ® or ©.
5. For this report, *National Norms* for various health risks are used. The default values are for the United States as a whole, and are drawn from a wide variety of authorities. These National Norms values are editable, so that you can use figures that are more accurate for your region or your population. The specific National Norms fall into ten *Risk Groups*:

- Cancer Risk
- Diabetes Risk
- Osteoporosis Risk
- Nutrition
- Fitness
- Stress and Coping
- Safety
- Weight
- Chronic Health Conditions
- Health Interest

If you wish to edit any of the National Norms, first select the appropriate Risk Group from the drop-down menu. Then fill in the percentage value to override the default National Norm value for the specific risk. When you are finished editing the National Norms, click **Save Settings**. Click [Restore Defaults](#) to return the Norms to their default values.

6. Click **Next**.
7. In **Step 4** of the wizard, choose the date range for your report.
8. If you would you like to use *only* the most current assessment for each participant, select “Use the latest assessment for each participant.”
9. Enter the total number of participants that could potentially participate in your HRM program.

**Step 4 of 4: Criteria and Settings**  
Set the settings for the report to use. An email is required. It will be used when the batch report is complete and is ready for download.

From: Month & Year: 1 2000  
To: Month & Year: 12 2010

Assessment:  Use the latest assessment for each participant

Number of participants that could participate:

Recommended goal:  85 % Recommended goal: 85%

Glossary:  Include glossary in report

Email:  stevep@wellsuite.com

Previous Finish Cancel

**Figure 92: Batch Executive Summary Report – Step 4**

10. Enter your goal for participation in the program. The default is 85%.
11. If you would like a glossary of terms included in the report, select the checkbox by “Include glossary in report.”
12. Enter your email address. The system will email you when the report is completed.
13. Click **Finish**.



## Create a Detail List Report

The Detail List Report allows you to export participant details and assessment results for the purpose of external processing. The output of this report is a Comma-Separated Values (CSV) file, which can be imported into many other programs, including Microsoft Excel™.

1. In **Step 1** of the wizard, select *Detail List Report* as the type of batch report you want to create. Optionally, you may use a saved Detail List for creating your report.

**Step 1 of 4: Report Type**  
Choose the report you will be doing a batch report for.

- Personal
- Counselor Summary
- Productivity and Economic Benefits Report (PEBR)
- Executive Summary Report
- Detail List Report
  - Use a Saved Detail List

Next >> Cancel

Figure 93: Detail List Report - Step 1

2. In **Step 2** of the wizard, choose the subgroups for which you want to create Personal Reports. You may select one subgroup or multiple subgroups.

**Step 2 of 4: Type of Criteria**  
Which criteria would you like to use for the report?

- Subgroup Specific
- Criteria Search

Choose the subgroup(s) you will be generating the report for. A single report.

- 24A
- AA Test
- AAA Test
- ABC Company
- Alpha1
- Alpha2Test

<< Previous Next >> Cancel

Figure 94: Detail List Report - Step 2

3. In **Step 3** of the wizard, create a name for the report. Note that the name cannot contain any special characters, as noted in the dialog.

**Step 3 of 4: Name and/or Footer**  
Report name can not include any of these characters <> ` ~ !

Report Name: \* Oregon Subgroups 2010

<< Previous Next >> Cancel

Figure 95: Detail List Report - Step 3

4. In **Step 4** of the wizard, there are two tabs for report criteria. In the first tab, called **General Criteria**, first select the report start and end date. This will consist of the month and year—no day is required.

5. To include *only* the most current assessment for each participant in the report, select “Use the latest assessment for each participant.”

6. To add the date and time of each participant's last login, select "Include last login"

7. To include only participants who are currently listed as active, select "Include only active participants."

8. To include a count of how many assessments each participant has taken within the date range, select "Include a count of the number of assessments present in the date range per individual."

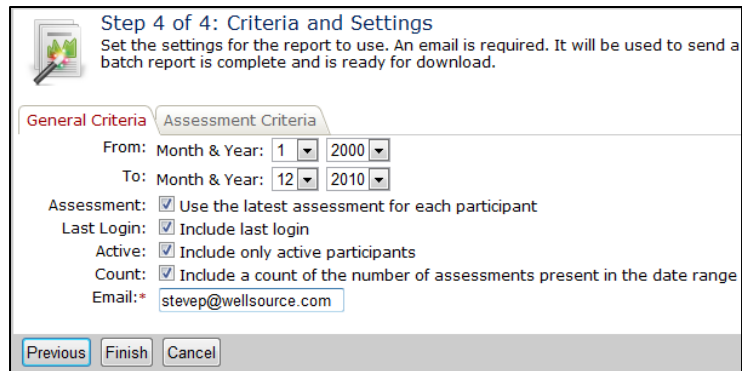


Figure 96: Detail List Report - Step 4, General Criteria

9. To continue setting the Detail List Report criteria in Step 4 of the wizard, click on the second tab, called **Assessment Criteria**.

10. In the Assessment Criteria tab, select the checkboxes next to the name of each field that you want to include in the report. Clear the checkboxes next to fields you want to exclude. This is a very long list; you will have to scroll to see all of the fields. When you have all of the desired fields selected, click the **Finish** button at the bottom of the page.

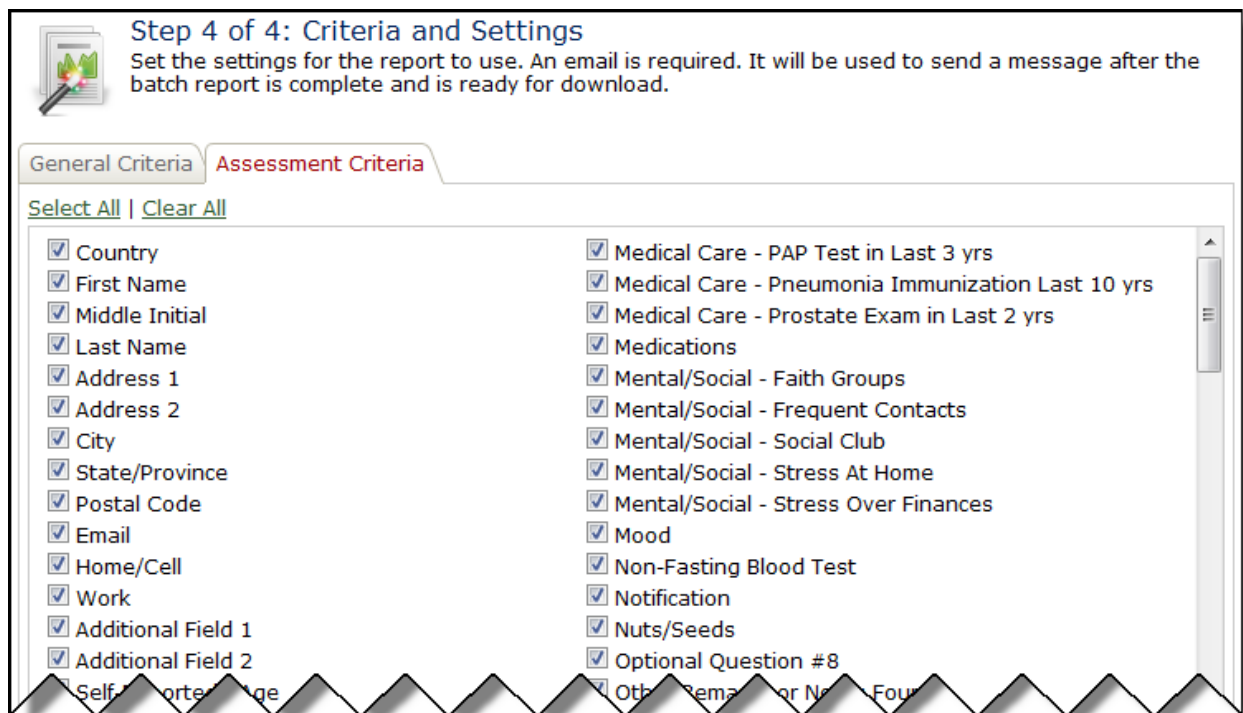


Figure 97: Detail List Report - Step 4, Assessment Criteria

- The output of the Detail List Report will be a CSV file, containing all of the data you specified in the wizard. You can open this file with Microsoft Excel™, OpenOffice CALC™ and many other programs.

	A	B	C	D	E	F	
1	SubGroupName	WellSuiteLoginID	AssessmentDate	AssessmentName	TotalAssmt	DateLastLogin	intSeq
2	SPtest	aarona	10/24/2010 17:13		1	10/28/2010 16:06	
3	SPtest	chetb	9/7/2010 9:44		1	9/13/2010 10:54	
4	SPtest	raymondb	10/27/2010 9:11		1	9/13/2010 14:56	
5	SPtest	charliec	10/27/2010 12:24		1	10/28/2010 12:02	
6	SPtest	maryjones2	10/27/2010 13:32		1	10/27/2010 10:42	
7	SPtest	maryjones	10/27/2010 13:30		1	10/27/2010 11:01	
8	SPtest	manny	10/28/2010 12:07		1	10/28/2010 12:07	
9	SPtest	henryw	10/28/2010 16:01		1	10/28/2010 16:01	

Figure 98: Output of Detail List Report, displayed in spreadsheet

### Final steps for ALL Batch Reports

- Once you receive the email that your report is complete (this should happen within 10 minutes in most cases) log into your Administrative URL and access the Reporting: Batch Reports sub-tab.
- Click the [View Reports Available for Download](#) link. You will see a list of your reports, in the order that they were processed.

The screenshot shows a web application interface with a navigation bar at the top containing tabs for Subgroup Settings, Theme Settings, Participants, EMA Management, Assessment, Report, Reporting (highlighted), and Tools. Below the navigation bar, there are sub-tabs for Participant, Subgroup(s), Participant Usage, Batch Reports (highlighted), and View/Edit. The main content area includes links for '- Create a New Report' and '- View Reports Available for Download'. Under the heading 'Reports Available for Download', it states 'Number of reports found: 16 Refresh Listing'. A table lists the following reports:

File, Date Range and Subgroup Generated From	Total Pages/Files	Number of Reports	Report Type	Date Created
<a href="#">release1104_04Nov201082600.zip</a> Date Range: 1/1/2010 - 12/31/2010 Subgroup: LynUpload10Person	32	10	Counselor	04-Nov-2010 8:31 PM
<a href="#">mycounselor_04Nov201082055.zip</a> Date Range: 1/1/2009 - 12/31/2010 Subgroup: CourageCenter NEVER modify	30	10	Counselor	04-Nov-2010 8:29 PM
<a href="#">release1104_04Nov201082046.zip</a> Date Range: 1/1/2010 - 12/31/2010 Subgroup: LynUpload10Person	1	10	Detail List	04-Nov-2010 8:27 PM
<a href="#">release1104_04Nov201081912.zip</a> Date Range: 1/1/2000 - 12/31/2010 Subgroup: LynUpload10Person	140	10	Personal	04-Nov-2010 8:26 PM
<a href="#">release1104_04Nov201082015.zip</a> Date Range: 1/1/2010 - 12/31/2010 Subgroup: LynUpload10Person	20	10	Executive	04-Nov-2010 8:25 PM

Figure 99: Batch Reports download list

3. Click the name of your report.
4. You will receive a dialog box asking you to **download** or **open** the report. Select either, as you wish.

## **Reporting: View/Edit Sub-tab**

The View/Edit sub-tab supports two functions. First, it allows you to view multiple assessments side-by-side. This can be helpful in tracking a participant's progress. Second, it provides an interface to manually edit data within an existing assessment or add a new assessment.

**Figure 100: The View/Edit Sub-Tab**

### ***Create a new assessment for a participant***

1. Click [Add New Assessment](#).
2. Enter a **Name** for the assessment. The default name is today's date, but you can edit this to be anything meaningful for you.
3. Search for the participant by entering a full or partial First Name, Last Name, User Name/ID, or Email; then click **Go** to retrieve all matches.
4. Locate the participant in the **Results** drop-down list. If you find that the participant has not yet been added to the system, you'll have to do that first. See *Participants: Add New Participant* on page 22 for more information.

**Figure 101: Add a new assessment**

5. Click **Create Assessment**.
6. Any existing biographical data for the participant is automatically filled in. Edit this as needed, and then continue down the form. Once all of the *required* questions are answered, the Assessment is considered "Completed" and is automatically saved. From that point on each additional answer is saved as soon as it is entered.

**NOTE:** If you exit this page before answering all of the required questions, the assessment will not be considered complete.

Figure 102: Filling out the new assessment

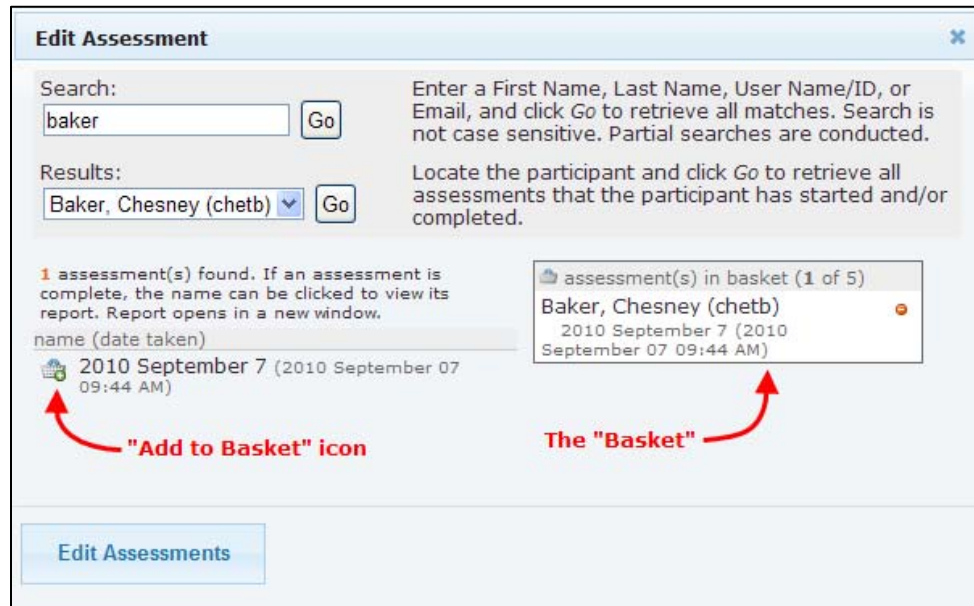
***Edit an existing assessment for a participant***

1. **OPTIONAL:** If you want to limit the date range for assessments that can be selected, select the checkbox by **Use assessment in date period**, then click the Calendar icon. Use the Calendar dialog to select the Start date and End date of the range of assessments you will select. Use the arrow buttons to select a Month and Year, then click the Day in the calendar. Do this for both Start date and End date.


Figure 103: Date Period dialog

2. **OPTIONAL:** If you'd like to see the participant's report after it has been recalculated, select the checkbox by **View report after recalculation?**


- Click [Edit Assessment](#).




**Figure 104: Selecting an Assessment to edit**

- Search for the participant by entering a full or partial First Name, Last Name, User Name/ID, or Email; then click **Go** to retrieve all matches.
- Locate the participant in the **Results** drop-down list, and click **Go**.
- You'll see a list of all assessments taken by this participant, both complete and incomplete.
- Click the  **Add to Basket** icon next to the assessment you want to edit. The assessment name will appear in the "Basket" area on the right.

**NOTE:** You can edit multiple assessments at one time if you like. Simply add additional assessments to the basket by clicking their **Add to Basket** icons.

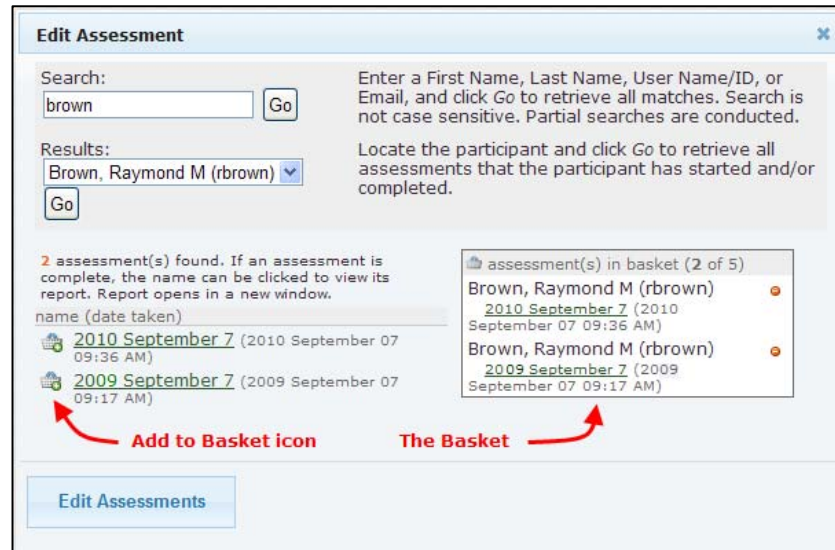
To remove an assessment from the Basket, click the  red dot to the right of the assessment's name in the Basket.

- Click **Edit Assessments**.
- You can now edit any existing biographical data or answers on this as needed. Once all of the required questions are answered, the assessment is considered "Completed" and is automatically saved. From that point on each additional answer is saved as soon as it is entered. It is a good practice to recalculate the data when you are finished editing, by clicking the  **Recalculate** icon.


## Viewing multiple assessments side-by-side


Viewing assessments side-by-side is identical to editing an assessment, with the difference that you will add multiple assessments to the “Basket.” Up to five assessments can be compared.


1. Click **Edit Assessment**.




**Figure 105: Select Assessments to compare**






2. Search for the participant by entering a full or partial First Name, Last Name, User Name/ID, or Email; then click **Go** to retrieve all matches.
3. Locate the participant in the **Results** drop-down list, and click **Go**.
4. You'll see a list of all assessments taken by this participant, both complete and incomplete.
5. Click the  **Add to Basket** icon next to each of the assessments you want to compare (up to five). The assessment names will appear in the “Basket” area on the right.

To remove an assessment from the Basket, click the  red dot to the right of the assessment's name in the Basket.

6. Click **Edit Assessments**.
7. You can now compare *or edit* any existing biographical data or answers on any of the displayed assessments. Once all of the required questions are answered, the assessment is considered “Completed” and is automatically saved. From that point on each additional answer is saved as soon as it is entered. It is a good practice to recalculate the data when you are finished editing, by clicking the  **Recalculate** icon.

## *Add / Edit / Compare Tools*

When you are editing data in an assessment, you'll see a  **Tools** icon at the top of each assessment's column. If you hover your cursor over this icon, you'll see several action icons:

-  **Expand / Collapse Column.** When comparing more than two assessments, you may find that you don't have enough room on your screen to view all of them simultaneously. Click this icon to collapse an assessment column to minimum screen width, so that you may focus on other columns. Click it again to expand a collapsed column to standard width.
-  **View Personal Report.** Click this icon to see the participant's personal report for this assessment.
-  **Copy Assessment.** Clicking this icon simply makes a new assessment that is an exact copy of the existing assessment. You can give it a new name, and even assign it to a different participant. Some Administrators find this function helpful for demonstrating the positive results of making some achievable lifestyle changes.
-  **Print Assessment to CSV.** Click this icon to export all questions and answers in the selected assessment to a standard Comma-Separated Values file, which can be opened and manipulated in other programs such as Microsoft Excel®.
-  **Remove Assessment.** Removes the assessment from the display, but does NOT delete it.

## *Numeric Keypad Data Entry*

If you have a large amount of data to enter manually, you may prefer to enter the data using your PC's numeric keypad, rather than mouse-clicking each item.

Other than the Biographical and Health Test fields such as Clinical Weight or Total Cholesterol (which require a specific value to be entered), most questions can be answered by entering a single digit on your numeric keypad, then pressing your Tab key to move to the next field.

For example, the question about **Stress at home** has four possible answers. The full question asked of the participant is: "How often do you have feelings of stress at home?"

The four possible answers are:

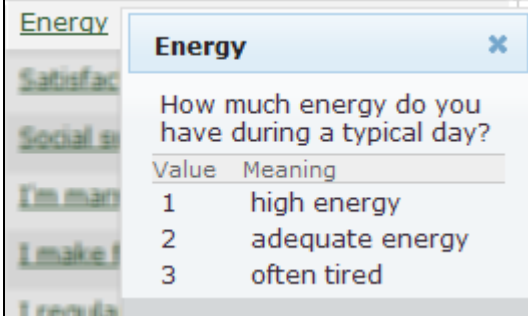
<b>Value</b>	<b>Meaning</b>
1	never
2	sometimes
3	often
4	permanent or continual stress



If the participant's response was 1, meaning "never," you can simply type **1** on your numeric keypad, and then press your **Tab** key to move to the next field.

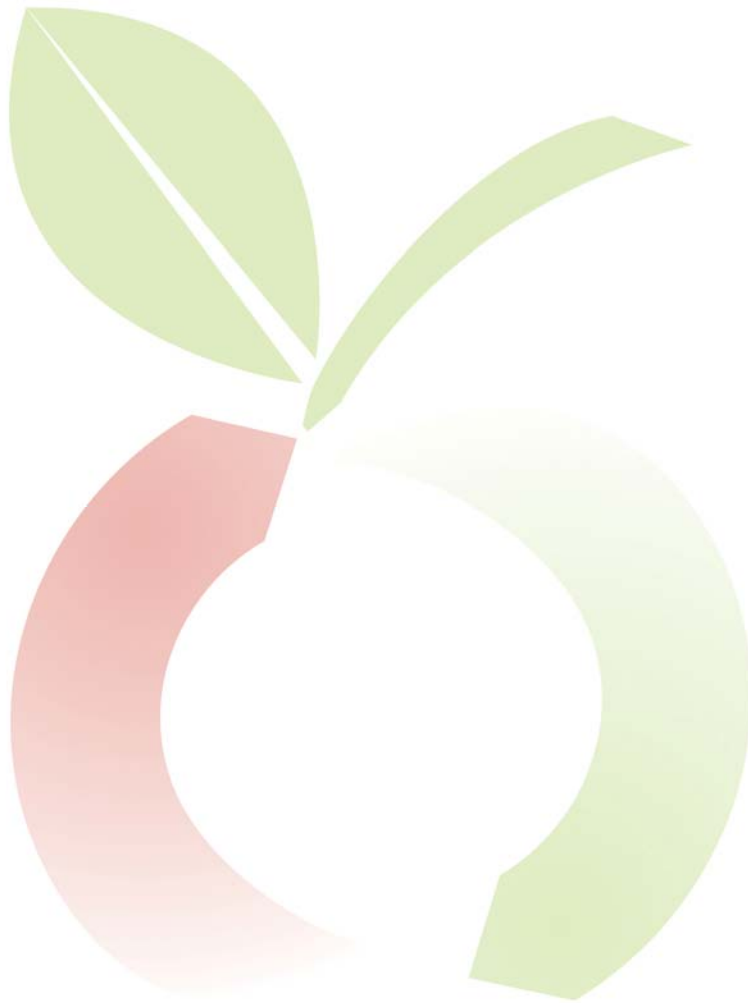
**NOTE:** This data entry technique is a bit different from "10-key" data entry techniques you may have used in the past. You cannot move to the next field by pressing the **Enter** key; you must use the **Tab** key. **Shift+Tab** moves you to the *previous* field.

If you need to see what the allowable numeric entries mean for a specific question, click the question itself. Example: Click [Energy](#).



Energy	
How much energy do you have during a typical day?	
Value	Meaning
1	high energy
2	adequate energy
3	often tired

Figure 106: Numeric keypad entry values



# TOOLS TAB

A number of administrative tools are grouped together in the Tools tab:

1. Forgotten Password Questions
2. Translate Headers and Welcome
3. License Information
4. Terms and Conditions
5. Contact Information
6. Suggestion Box
7. SAML SSO Certificate Upload



Figure 107: The Tools tab

## Forgotten Password Questions

When a participant registers in the system, he is asked to choose a “Password Reset Question.” Each participant chooses the question, and provides the answer, so he may answer the question any time he wants or needs to reset his password. This utility allows you to set the allowable questions for this subgroup.

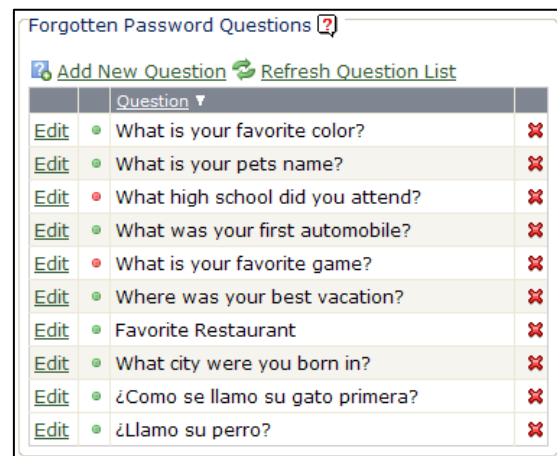


Figure 108: Forgotten Password questions

### Add a new Password Reset Question

1. Click [Add New Question](#).
2. Enter your new question.
3. Would you like to use this question on your site right now? If the answer is yes, select *Use*, otherwise, select *Don't Use*.

Figure 109: Add a new password reset question

4. Select the language for this question from the drop-down list (if you have purchased language options).
5. Click **Submit**.
6. You will be taken to a summary screen of your question. Click the to exit this screen and return to the Tools tab.
7. Click [Refresh Question List](#) and you will see your new question.

### Edit a Password Reset Question

1. Click [Edit](#) next to the question you would like to edit.
2. Edit the question as desired.
3. Would you like to use this question on your site right now? If the answer is yes, select *Use*, otherwise, select *Don't Use*.

Figure 110: Edit a password reset question

4. Click **Save Changes**.
5. You will be notified that your question was successfully updated.
6. Click the to exit this screen and return to the Tools tab.

## Translate Headers and Welcome

### *Headers*

You may change the names of different sections of your participant's Home page. For example, on your participant's Home page, there is a "Welcome" section. Depending on your region and other factors, you *might* choose change the heading of this section to: "Howdy" or "Bienvenue."

To change a section header:

1. Click in the box of the header you would like to change.
2. Delete the existing text.
3. Enter your desired text.
4. Click **Submit**.

**Figure 111: Translate headers / Edit welcome message**

### *Edit Welcome Message*

In the Welcome Section, you may type any information you choose about your wellness program, open enrollment, etc. This section uses the Rich Text Editor, so you can apply text effects like boldface and underlining. For more information, see *The Rich Text editor Toolbar* on page 61.

To change the Welcome Message:

1. Edit the text as desired. Your message may have up to 2,000 characters.
2. Click **Submit**.

## License Information

In the License Information section, you can see how many assessments you have remaining on your site, how many assessments you have purchased, and when your license expires.

**Figure 112: License Information**

## Terms and Conditions

If you click [Terms and Conditions](#), you will see the terms and conditions that are posted for your participants upon their initial login. This is *not* editable. If your organization needs different Terms and Conditions displayed, please contact Wellsource Technical Support.

## Contact Information

In the Contact Information Section, you will see the contact information that Wellsource has within the Software Registration System for your company. This is *not* editable. If this needs to change at any time, you must contact Wellsource to change the content.

## Suggestion Box

This box is here for clients to send suggestions to the Wellsource Development Team on how the system could be improved or work better for them.

The Development Team creates an enhancement list based on these customer suggestions and adds them to future updates.

The Suggestion Box uses the Rich Text Editor, so you can apply text effects like boldface and underlining. For more information, see *The Rich Text editor Toolbar* on page 61.

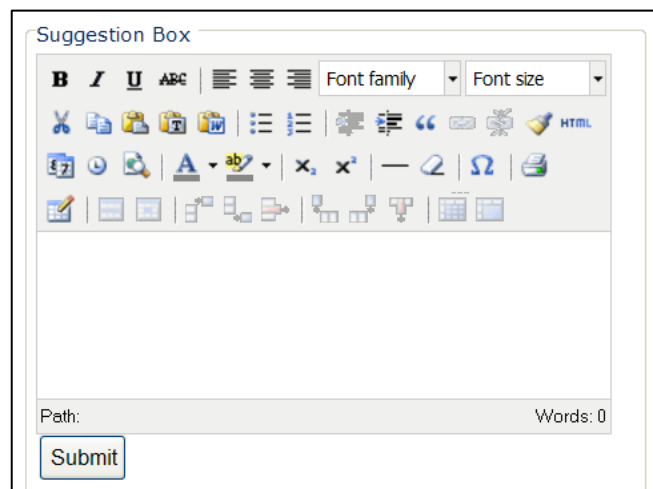


Figure 113: The Suggestion Box

## SAML SSO Certificate Upload

This section is for clients who have SAML SSO (Single Sign-On) as a part of their site. SSO is an add-on feature of the site, and there is an additional fee for this service. If you are interested in using SSO on your site, please contact your sales representative for more information.



Figure 114: SAML SSO certificate upload

