Onduo Care Team Console

User Guide

The Onduo Care Team Console is a component of the Onduo Software Platform which aims to help people with one or more of the following health conditions: Type 1 diabetes, Type 2 diabetes, hypertension, obstructive sleep apnea, and mental and behavioral health concerns. The software platform includes an app for the member's smartphone with access to a Care Team that can help the member track behaviors that matter to their diabetes, hypertension, obstructive sleep apnea, and mental and behavioral health.

The Onduo Care Team Console (console) is a web-based tool designed to help the Onduo and other Care Teams improve the health of individuals living with one or more of the following health conditions: Type 1 diabetes, Type 2 diabetes, hypertension, obstructive sleep apnea, and mental and behavioral health concerns. The console includes the capability for the Care Team to communicate, track, and assist individuals within a cohort of members.

Contact support

If you're having problems with the console, you can email: support@onduo.com, or call 833-446-6386. If you're participating in a clinical study, please follow the escalation process outlined for the study.

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1 Get started

Our mission is to:

- Support members living with Type 1 and Type 2 diabetes on their journey to their ideal glucose range.
- Help members with hypertension better manage their blood pressure.
- Support members looking to improve their mental and behavioral health.
- Help members interested in being evaluated for obstructive sleep apnea on their journey to understanding and managing their condition.

The console is designed to help a Care Team interact with members and each other (members of Care Team described in Roles and definitions). Each of these roles has a different set of features enabled in the console. This guide describes the full set of features available.

As a Care Team member, the console may allow you to:

- Have members assigned to you
- Track member health data (e.g. blood glucose, blood pressure, PAP usage, AHI, mask leak) and review trends
- Track member meals, exercise, and medications
- Track and reassess member conditions through A1C readings or PHQ-9 assessment or related
- Message and speak with members
- Send member content about how food, exercise, medications, and other lifestyle activities impact member conditions
- Collaborate on member care with others on the Care Team via notes
- Track tasks and their priority
- Manage member care plan and Support Tier
- View member profile information and devices
- Reference information from other services that are integrated according to the Enterprise User's system

WARNING/PRECAUTIONS

The Onduo Software Platform is not intended to provide automated treatment decisions or be used as a substitute for professional judgment. It does not measure, interpret, or make decisions on the data it displays. All medical diagnoses and treatments are to be performed under the supervision and oversight of a licensed healthcare provider.

The Onduo Software Platform is not intended as a substitute for a primary care physician's or mental health provider's guidance. You should advise members to discuss with their primary care provider or mental health provider before making major lifestyle changes.

Member messaging and notes are not meant to serve as the official health record for patient diagnosis and treatment. Communications for diagnosis and treatment should be documented in the Electronic Health Record.

1.1 Requirements

The console is designed to work with:

- A computer connected to 2 monitors. One should be at least 24 inches with a minimum resolution of 1920 pixels x 1200 pixels.
- Google Chrome browser version 96.0.4664.55 or higher
- Internet access (the console cannot be used if you are offline)

If you attempt to use the console outside these requirements, the experience may not work as intended or documented in this instructional guide.

1.2 Access the console

To access to the console:

1. Use your username and password to log in at https://myaccount.google.com.
2. Access the console at https://diabetes.sandbox.google.com/admin.

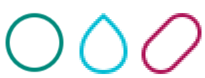
1.3 Introduction to the console

The console has 2 primary pages for everyday use:

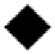
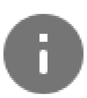
1. **My Members:** See a list of your members and understand who you should focus on next.
2. **Member Detail:** See the details for each member to better understand what to do next as they progress through the Onduo and Primasun programs.

1.4 Symbols in the console

See the table below to understand what the symbols in the console mean.

Symbol	What it means
	**Challenge task completed:** These symbols show that a member completed the challenge for that day.
	**Challenge task partially completed:** These symbols show that a member finished part of the challenge for that day.
	**Challenge task not completed:** These symbols show that a member did not complete the challenge for that day.
	**Challenge task not started:** These symbols show that a member has not yet started the challenge for that day.
	**Verified device or completed strategy:** In the "SUPPLIES" section, this symbol shows a member verifies which devices and should transmit data to the console and app. In the "STRATEGIES" section, this symbol also shows which strategy was used in the past.
	**Canceled strategy:** This symbol shows in the "STRATEGIES" section which strategy was canceled in the past.
	Target glucose range: This blue bar shows a member's target glucose range. If a reading overlaps with this blue bar, that means a reading is in range. If it is below or above the blue bar, that means that a reading is out

	of range. This product is not intended to collect insulin or glucose data for members in the T1D program. Therefore, users should not use this feature to support members enrolled in the T1D program.
●	**Glucose reading:** This symbol shows when a member logged a glucose reading. This symbol will be displayed with color, which gives additional information about the reading and is defined by the graph in which it is shown. For example, the color may represent which day the reading was taken or whether it was within the target range or outside of the target range. This product is not intended to collect insulin or glucose data for members in the T1D program. Therefore, users should not use this feature to support members enrolled in the T1D program.
◯	**Fasting glucose reading:** This symbol shows when a member logged a glucose reading and has tagged the reading as "fasting." This symbol may be displayed with color, which gives additional information about the reading and is defined by the graph in which it is shown. For example, the color may represent which day the reading was taken or whether it was within the target range or outside of the target range. This product is not intended to collect insulin or glucose data for members in the T1D program. Therefore, users should not use this feature to support members enrolled in the T1D program.
■	**Meal or medication:** This symbol shows when a member logged a meal or logged a medication. This symbol may be displayed with color; the color gives additional information about the reading and is defined by the graph in which it is shown.
▲	**Exercise:** This symbol shows when a member logged exercise. This symbol may be displayed with color; the color gives additional information about the reading and is defined by the graph in which it is shown.

	**Mood:** This symbol shows when a member logged their mood. This symbol may be displayed with color; the color gives additional information about the reading and is defined by the graph in which it is shown.
	**Challenge:**When the member logs a 'reflection' with a challenge event, 'R' is displayed.
	**Challenge:** When the member does not log a reflection with a challenge event, 'NR' is displayed.
	**Duplicate Member Name:** When there are multiple members with identical names, then this symbol is displayed.
	**Out of range:** This gray bar demonstrates when a member has not achieved their target range for AHI (apnea-hypopnea index) or Mask Leak.
	**In range:** This blue bar demonstrates when a member has achieved their target range for AHI (apnea-hypopnea index) or Mask Leak.
	Goal unmet: This lighter blue bar demonstrates when a member has not reached their PAP usage goal.
	**Goal met:** This darker blue bar demonstrates when a member has reached their PAP usage goal.
	**More information:** Hover over this icon to view additional information about a metric.

1.5 Roles and definitions

Learn about the different roles, responsibilities, and permissions for users of the Care Team Console. The table below outlines permissions associated with each role.

Role title	Responsibility	Overview of console permissions
Coach	Works directly with assigned members, sometimes called a coach	• Can view and message any assigned member • Can change editable data for any assigned member • Can view other Care Team members • Can reassign members to a Care Lead Manager (but not another Care Lead) • Can change members' Support Tier • Cannot create, view, or change data for members not assigned to them
Customer support representative	Reacts to requests and complaints, and may refer members elsewhere	• Can view any member or Care Team member • Can add notes to any member • Can add and assign tasks • Can have tasks assigned to them • Can edit member PCP info and demographics data • Cannot have members assigned to them
Coach Manager	Oversees Care Leads, reviews their members, and may be assigned members	• Can view or change any editable data for any member • Can create, view or change Care Team members • Can enroll new members • Can have members assigned to them • Can change any member's assignment to a Care Lead • Can only send messages to members for whom they are the Point of Contact
Partition Manager	Manages a Care Org configuration and associated content.	• Can view or change any educational content in the current partition • Can view or change any editable data for any member • Can create, view or change Care Team members • Can enroll new members • Can change any member's assignment to a Care Lead • Can edit settings related to CGM workflows and MD Referral workflows • Cannot send messages to any member

		• Can edit roles of admins in their partition with equivalent or lesser access (i.e. not system admins)
Content Manager	Manages education content cards.	• Can create, view, or change any educational content • Can view other Care Team members • Cannot send messages to any member
View Only	View member data for product research	• Can view member data within a single partition
System Admin	View and manage for product debugging	• Can view member data across all partitions • Can enroll new members • Can edit member data • Can edit roles/access for Care Team members
View Only System Admin	View member data for product research	• Can view member data across all partitions
Implementation Admin	Manages a Care Org system configuration and practitioners	• Can configure a Care Org and provision new practitioners
Report Admin	Uploads and manages reports	• Can upload and manage report scope in the Care Hub
IT Admin	Manages a Care Org system configuration and users	• Can configure a Care Org and provision new practitioners
User Admin	Manages users	• Can manage and provision new practitioners
Care Lead Manager Platform	Oversees Care Leads, reviews their members, and may be assigned members	• Can view or change any editable data for any member • Can create, view or change Care Team members

		• Can enroll new members • Can have members assigned to them • Can change any member's assignment to a Care Lead • Can only send messages to members for whom they are the Point of Contact
Report Viewer	View reports	• Can view reports in the Care Hub

1.6 Data freshness

To view the most up-to-date member data on the console, refresh or reload the page using your web browser. This will ensure that any data changes that may have occurred while viewing the screen are included on the page.

2 Intended Use

2.1 Intended use

The Onduo Software Platform is intended to provide individuals with health conditions, their healthcare professionals, wellness and care team a review, analysis, and evaluation of health data using the platform tools and modules. Users are able to view the results for any analysis done by the software.

The Onduo Software Platform is not intended for real-time monitoring of health data, nor is it meant as a primary display of data. The Onduo Software Platform is not intended to provide treatment decisions nor is it to be used as a substitute for professional healthcare advice. The platform is meant to be used adjunct to a member's standard of care.

2.2 Indications for use

The Onduo Care Team Console is intended to be used by healthcare professionals and care team users.

The Onduo Mobile App is intended to be used by individuals aged 18 or older on iOS and Android mobile operating systems with one or more of the following conditions: Type 1 or 2 diabetes, hypertension, mental behavioral health concerns and/or obstructive sleep apnea.

2.3 Contraindications

2.3.1 Onduo contraindications

The Onduo Software Mobile App is not intended for use by individuals who:

1. have had an inpatient admission to the hospital for a mental health reason OR a suicide attempt, in the last 3 months.
2. are currently pregnant.
3. have ever been diagnosed with any of the following conditions: Severe or end-stage kidney disease, Cystic fibrosis, Cirrhosis or liver failure.
4. have had an organ transplant or bone marrow transplant.
5. use supplemental oxygen (OSA only).
6. have a history of stroke (OSA only).
7. use opioid medications (OSA only).
8. have severe insomnia (OSA only).
9. have central apnea (OSA only).
10. have congestive heart failure (OSA only).
11. have neuromuscular disease (OSA only).
12. have moderate to severe pulmonary disease (OSA only).

2.3.2 Primasun contraindications

The Primasun OSA Program is not intended for use by individuals with :

1. Congestive heart failure
2. Neuromuscular disease
3. Moderate-to-severe pulmonary disease
4. Supplemental oxygen use
5. History of stroke
6. Opioid use
7. Severe insomnia
8. Central Sleep Apnea

3 Mental Behavioral Health (MBH)

3.1 Overview/Device Description

The Onduo app will provide a variety of tracking, goal-setting, and behavior change capabilities aimed at helping members enrolled in the MBH program manage their mental health and well-being. In addition to supporting messaging with their Care Lead, members may have access to telehealth through the app's appointment scheduling and video appointment capabilities.

Onduo MBH members will be provided an initial PHQ-2 Questionnaire. Members who score 3 or greater on the PHQ-2 indicate elevated risk for depression, and their questionnaire will expand to the full PHQ-9 questionnaire. Members are stratified into 3 care level groups: Low, Moderate, High based on the results of the questionnaire (and their risk level for other comorbid Onduo conditions, if relevant). Care team members using the new console (see Section 21, New console) can also send the PHQ-2/PHQ-9 manually by going to "Manage Program" (see Section 21.3.1 View Care Plan) and selecting "Depression Check-In (Reassessment) Survey" from the Library (Section 21.3.2 Manage Care Plan to find the Library).

The PHQ-2/PHQ-9 Questionnaire is a screening tool to identify Onduo MBH depression symptom severity and assist Onduo P.C. clinicians in making a diagnosis of depression. The data is stored in the Onduo Software Platform and used by the Clinician. The group assignment and results of the Questionnaire will be provided to the Care Lead for review and confirmation of appropriate level of care. Members whose responses trigger the full PHQ-9 at any point will always see the full questionnaire going forward. PHQ-9 results also prompt the generation of specific tasks. For more detail, see Section 4.2, "Understand task prioritization across assigned members," below.

The Care Team Console is used by health-care professionals and their Care Team to send and receive messages with patients enrolled in the MBH program and track their progress with respect to depression and mental health care. It also allows them to perform various activities such as creating and resolving tasks and creating and viewing strategies and notes. They can also review mood log entries and other lifestyle related information about each user, to deepen their understanding of that user and provide better coaching.

3.2 MBH Features

Key features of the Onduo Mental Behavioral Health program include:

1. Display and logging of mood, depression, anxiety, and other mental health measures using industry-standard patient-reported outcome measures such as the PHQ-2/PHQ-9 as well as new measures and trackers specific to Onduo
2. Self-help tools designed to encourage mental well-being through behavioral and cognitive changes that may ease common symptoms of depression, anxiety,or related symptoms.
3. Access to coaching, therapy, or psychiatric care
4. Assistance in engaging a suitable mental health professional outside of the Onduo and Primasun app and care team, such as identifying the right provider, checking insurance coverage, scheduling an appointment, and preparing for appointments
5. Ability to exit members from the program when they are identified as not eligible

3.3 Intended Use

The Onduo Mental Behavioral Health program is intended to screen members for mental health conditions and facilitate appropriate interventions to manage their symptoms. Enrolled members will be provided with tools to manage their anxiety, depression or related symptoms through self guided digital activities and lifestyle management skills via in app education as recommended by their care leads. As needed, members will be connected with recommended qualified healthcare professionals most appropriate to their needs to engage in mental health clinical consultation via telehealth visits.

3.4 Indications for Use/Target Population

The Onduo Mental Health Management program is targeted toward individuals facing a mental health need, with or without an existing diagnosis. Targeted individuals also include Onduo members currently working on improving other outcomes in another condition, such as Diabetes or Hypertension. New Onduo members may join with the primary purpose of improving mental health outcomes. The Onduo Mobile App is not intended for use by people who have had an inpatient admission to the hospital for a mental health reason OR a suicide attempt in the last 3 months.

4 Obstructive Sleep Apnea (OSA)

4.1 Overview/Device Description

The Onduo and Primasun apps will provide a variety of tracking, goal-setting, and behavior capabilities aimed at helping members enrolled in the OSA program manage their obstructive sleep apnea. In addition to supporting messaging with their Care Lead, members may have access to telehealth through the app's appointment scheduling and video appointment capabilities.

Each OSA member will be provided with a Sleep Questionnaire. A sleep physician will review questionnaire results and conduct an evaluation video visit with the member. If appropriate, the physician will prescribe a Home Sleep Test. After the member completes the HST and attends a follow-up diagnosis video visit with a sleep physician, the OSA member may be diagnosed with OSA and prescribed PAP therapy.

The Care Team Console is used by health-care professionals and their Care Teams to send and receive messages with patients enrolled in the OSA program and track their progress with respect to PAP therapy. Healthcare professionals and Care Team members can perform various activities in the Care Console, including:

- Creating and resolving tasks
- Creating and viewing strategies and notes
- Review a member's Positive Airway Pressure (PAP) usage, AHI, and mask leak data
- Review responses to member questionnaires (Sleep History)

These tasks and capabilities deepen Care Team members' understanding of their members and help them provide better coaching.

4.2 OSA Features

Key features of the Obstructive Sleep Apnea Platform include:

1. Display of sleep questionnaire responses and PAP therapy data
2. Guided activities designed to to support onboarding and adaptation to PAP therapy for OSA, and encourage good sleep habits and healthy sleeping routines
3. Access to coaching and guidance on using PAP therapy
4. Ability to exit members from the program when they are identified as not eligible

4.3 Intended Use

The Onduo Sleep Apnea Program and Primasun Sleep Apnea Program are intended to facilitate an Obstructive Sleep Apnea (OSA) management program. Members enrolled in the OSA Program will be assessed for sleep apnea through home sleep testing and professional evaluations.

The OSA program will facilitate appropriate interventions to manage diagnosed members' symptoms through self guided digital activities and lifestyle management skills via in-app education around their OSA therapy, as recommended by their care leads. As needed, members will be able to message Health coaches and get connected with qualified healthcare professionals to engage in clinical consultation via telehealth visits.

4.4 Indications for Use/Target Population

The Onduo and Primasun Mobile Apps are intended to be used by adults aged 18 or older on iOS and Android mobile operating systems with Obstructive Sleep Apnea.

Intended User Groups:

Health Coach/Care Lead	Care Leads are responsible for administering Motivational Enhancement Therapy to improve adherence among Patients.
Client Service Representative	Client service representatives triage patient issues escalated by care leads and reassign the issues to the appropriate respiratory therapist or sleep physician.
Respiratory Therapist	A licensed respiratory therapist will serve as an escalation point for a care lead or client service

	representative to provide services related to respiratory care.
MD	Licensed physicians are responsible for: -Evaluating a Patient's suitability for a Home Sleep Test -Ordering HST Interpreting the results of an HST and generating a signed sleep report -Managing the patient's sleep care and typically ordering PAP therapy for patients who are diagnosed with sleep apnea

4.5 Contraindications for OSA/Primasun

The Onduo OSA Program and Primasun OSA Program are not intended for use by individuals with:

1. Congestive heart failure
2. Neuromuscular disease
3. Moderate-to-severe pulmonary disease
4. Supplemental oxygen use
5. History of stroke
6. Opioid use
7. Severe insomnia
8. Central Sleep Apnea

5 My Members page

The My Members page provides an overview of members that may require your attention.

Based on what tasks are open for each member, the console assigns a priority number to the member ranging from 1 (very high priority) to 10 (very low priority).

5.1 Manage your members

Click **My Members** in the page heading to see a list of all members that are assigned to you, organized in the following tables:

- **Highest priority:** Members with a pending task related to hypoglycemia, hyperglycemia, hypertension crisis, hypotension crisis, high pulse rate, low pulse rate, MBH telemedicine task, and/or members automatically referred to MBH direct care.

- **Comanaging POC:** Members for whom you are the Point of Contact, but are not the assigned Care Lead.
- **Members escalated to me:** Members assigned to another Care Team member that has escalated a task to you. This section only appears for Care Team Managers, Partition Managers, and Customer Support Representatives.
- **New Messages:** Members that have a "Respond to message" pending task but do not appear in the above tables.
- **New Tasks:** Members that have not messaged a coach within 30 days with any pending tasks that do not appear in any of the above tables.
- **Comanaging**: Members to whom you are assigned as Care Lead, but are not the point of contact
- **Inactive Members:** Members that have not messaged a coach in 30 days without any pending tasks that do not appear in any of the above tables.
- **No Pending Tasks:** Members with no pending tasks assigned to you that do not appear in any of the above tables.
- **Never Logged In:** Members that have signed up for Onduo or Primasun but have not logged into the app.

You can use the find functionality built into your browser to find specific information on this page.

5.1.1 Sort members

By default, members in each table are sorted by priority. For more information see "Understand Member Prioritization."

To sort members, under "My members," click one of the column headers (for example, **Member Name** or **Time Zone**).

5.1.2 Open a Member Detail page

To open a Member Detail page:

1. Open the console.
2. In the page heading, click **My Members**.

3. Sort, search, or navigate to a member in your list.
4. Click the member's ID number in blue.
5. The Member Detail page will open in a new Chrome tab.

5.2 Understand task prioritization across assigned members

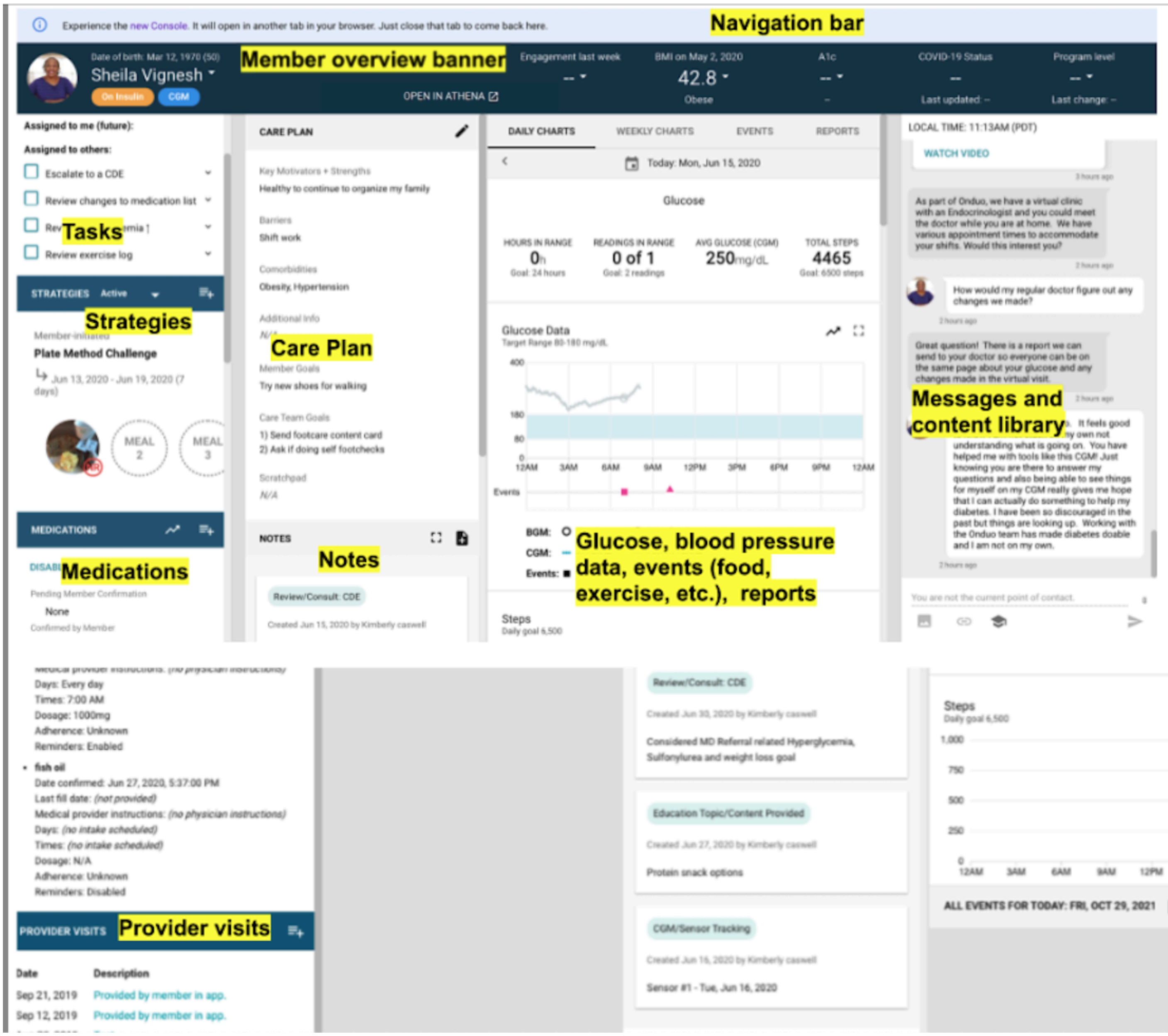
Learn more about how and why members receive a prioritization in the table below:

Priority	What this means
1	A member designated as Priority 1 will automatically appear at the top of your list on the My Members page until the associated task has been resolved. A member moves to Priority 1 when they present with: ● Severe hypoglycemia (very low blood glucose, 54 mg/dL or less according to the ADA 2018 Standards of Care). ● Member Automatically Referred to MBH Direct Care. This indicates that a patient case was automatically created for this member in Athena for urgent review by a clinician, due to the member's PHQ-9 score being greater than or equal to 20 or indicating suicidal ideation/thoughts of self harm (score >0 on question #9).
2	A member designated as Priority 2 will automatically appear below Priority 1 members in your list on the My Members page until the associated tasks have been resolved. A member moves to Priority 2 when they present with: ● Hypoglycemia (low blood glucose, 70 mg/dL or less) or hypertensive crisis (systolic blood pressure greater than or equal to 180 mmHg or diastolic blood pressure greater than or equal to 120 mmHg). ● "MBH Telemedicine Task" (Member requires an MBH Telehealth visit). This task is triggered when a member completes the PHQ-9 with a score greater than or equal to 10 and has not generated this task before.
3+	Members will be assigned to Priority 3+ when they are associated with other,

	less critical tasks. Depending on the priority of tasks assigned to other members, members will automatically display in order of descending priority. A member is designated Level 3+ for: ● Review of hypotensive blood pressure readings ● Review of low or high pulse rate ● “Member has elevated PHQ-9 score” (PHQ-9 score of 10 or greater) ● Low PAP Usage ● High AHI ● High Mask Leak ● Other tasks requiring proactive coaching

6 Member Detail page overview

The Member Detail page provides current information about an individual member in a single screen.



Detailed member information is visible in five main sections:

1. Navigation bar
2. Member overview banner
3. Tasks, Strategies and Medications
4. Care Plan and Notes
5. Glucose, blood pressure, reports (including PHQ-9), and event data
6. Messages and content library

7 Member Overview Banner

At the top of the Member Detail page, see key clinical information about the member you're viewing.

7.1 Photo (or avatar), member name, date of birth, age, and language

The member controls these elements or are entered at the time of registration. After registration, Care Leads may edit member names. Communicate with your Onduo System Administrator if you believe there are errors in these fields. Clicking on the member name shows more account details and an interface for controlling member supplies and devices.

“Espanol” appears if the system preferences of the member’s mobile device are set to Spanish. The member will see content in the app in Spanish, and all communication with the member should be in Spanish.

7.2 “On Insulin” warning

An orange warning is visible when an Insulin Warning has been enabled in the medications section, described below.

7.2.1 Manage member insulin warning

If a member has Diabetes, you can enable or disable the insulin warning:

1. Open the Member Detail page.
2. Navigate to "MEDICATIONS."
3. Click **ENABLE INSULIN WARNING** or **DISABLE INSULIN WARNING.**

(Note: if the member does not have Diabetes this control will not be available on the member's page)

If enabled, an item reading "On Insulin" will appear at the top of this member's detail page, below their name and date of birth.

This insulin warning must be enabled manually. It is not automatically enabled if a member adds or confirms insulin as part of their medication list.

7.3 Primary device

Learn whether the member is using a blood glucose meter (BGM) or a continuous glucose monitor (CGM). The program experience is different depending on which device the member is using.

7.4 Enrolled condition

A BP chip will appear on the Member overview banner for members that have enrolled in the hypertension program. An MBH chip ("DEP") will appear on the banner for members that have enrolled in the Mental and Behavioral Health program. An OSA chip will appear on the Member overview banner for members that have enrolled in the obstructive sleep apnea.

7.5 "Open in Athena" link

Clicking this link will open the patient's record in Athena.

7.5 BP checkpoint

See the systolic and diastolic blood pressure averages for members that have enrolled in the hypertension program and completed at least one blood pressure checkpoint. Clicking the drop-down arrow ▼ will show a history of completed blood pressure checkpoints, with averages for each, which can be used to determine the trend of the member's blood pressure.

7.6 Engagement last week

See the member's most recent engagement score, week-over-week trend and spark chart showing weekly engagement over the last 12 weeks. Clicking the drop-down arrow ▼ will show the member's engagement details that contribute to the calculation, including:

1. Days member sent at least one message

2. BGM readings
3. Days with CGM readings
4. Number of food Logs
5. Number of exercise Logs
6. Number of medication Logs
7. Number of mood Logs
8. BP readings
9. Completed member activities

7.7 BMI

See the member's most recent Body Mass Index calculation, date and grading. This will be displayed when the member's height and weight are known. Clicking the drop-down arrow will show the member's BMI values over time.

Below the graph, you can see a table of the BMI values and associated detail. If a member enters a height and weight during onboarding, a BMI is automatically calculated and reported.

7.7.1 Manually adding a BMI measurement

1. Open the Member Detail page.
2. In the top, below the BMI header, click the drop-down arrow .
3. In the window that appears, click the Add Weight button .
4. Add the member's weight, including date measured, source of the result, and any notes that might be helpful in the future.
5. When done, click **ADD**.
6. If the displayed Height needs to be updated, click **Update**.
7. In the window that appears, enter the member's height.
8. When done, click **UPDATE**. Note that updating the member's height will recalculate the current and all previous BMI calculations.

The new BMI value will appear in the graph and table.

7.7.2 Remove or invalidate a BMI value

1. Open the Member Detail page.
2. In the top, below the BMI header, click the drop-down arrow ▼ .
3. In the window that appears, find the value in the table that you want to invalidate.
4. To the right of the value and notes, click the delete button 🗑 .
5. In the pop-up window, click OK to confirm.

The BMI value will be removed from the chart and the table.

7.8 A1c

If the member has type 2 diabetes, see the member's most recent hemoglobin A1c (HbA1c) information (including when it was taken). This product is not intended to collect insulin or glucose data for members in the T1D program. Therefore, users should not use this feature to support members enrolled in the T1D program.

Clicking on the A1c value shows you all A1c values saved in the console for a specific member, as well as the source (i.e. where the data came from) of each A1c value:

- “Self-report” - A1c value was reported by the member (often via messages) and has not been verified by the Care Team.
- “Basic Health Survey” - A1c value was reported by the member in the onboarding or follow-up survey and has not been verified by the Care Team.
- “Care Team Verified” - A1c value was verified by the Care Team; this is often accomplished by the Care Team asking the member to send a picture of the A1c result via messages.
- “Health Plan” - A1c value was received directly in lab data from the member’s plan.
- “HbA1c home test kit” - A1c value was received from an Onduo-supplied at-home A1c test.

The red line is drawn at 6.5%, the A1c level that the American Diabetes Association uses as the most strict target for people living with Type 2 diabetes. The line is not intended to be a goal, just a visual reference. The vertical axis can accommodate A1c values from 3–20%.

Below the graph, you can see a table of the A1c values, including date, source of the data, and notes.

7.8.1 Manually add an A1c reading

1. Open the Member Detail page.
2. In the top, below the A1c header, click the drop-down arrow .
3. In the window that appears, click the Add A1c button .
4. Add the result, including test date, source of the result, and any notes that might be helpful in the future.
5. When done, click **ADD**.

The new A1c value will appear in the graph and table.

7.8.2 Remove or invalidate an A1c result

1. Open the Member Detail page.
2. In the top, below the A1c header, click the drop-down arrow .
3. In the window that appears, find the value in the table that you want to invalidate.
4. To the right of the value and notes, click the delete button .
5. In the pop-up window, click **OK** to confirm.

The A1c value will be removed from the chart and will be grayed out in the table. You cannot edit or delete A1c readings automatically uploaded by the console system.

7.9 Support Tier

Support Tier, formerly known as Overall Program Level, determines the amount of support and resources provided to a member. Support Tier is assigned after onboarding and applies to all programs the member is enrolled in. Support Tier is determined by a stratification model, is influenced by the member's payer, and can be changed manually by the care team as needed.

See the member's Support Tier based on system level data about the member. Click on the Support Tier to see additional details. For more on changing a member's Support Tier, see Manage Support Tier.

7.10 Condition Severity

Condition severity, formerly known as Condition-Specific Program Level, is a high-level (High, Moderate, Low) automatic clinical stratification that is assigned for each condition a member is associated with. Each condition has unique criteria for determining condition severity (primarily lab values and recent hospitalization). Condition severity is a primary factor in auto-initiating certain interventions, such as the CGM workflow and BP monitor shipments. Condition severity cannot be manually changed, but can be viewed in the Support Tier dropdown.

7.11 Manage member supplies and devices

You can send supplies to members through the console, which may include blood glucose monitoring strips, lancets, control solution, and electronic devices used to monitor blood glucose, like a continuous glucose monitor (CGM). Please note that you cannot send OSA supplies through the console.

Members can also connect their own blood pressure monitors, including:

- A&D UA-651BLE Blood Pressure Monitor

- CVS Health Series 800 Blood Pressure Monitor
- Omron 7 Series (BP7350) Wireless Upper Arm Blood Pressure Monitor
- Omron 5 Series (BP7250) Upper Arm Blood Pressure Monitor
- Omron HEM-9200T Blood Pressure Monitor
- Omron HEM-9210T Blood Pressure Monitor
- Omron BP9300T Blood Pressure Monitor
- Omron BP9310T Blood Pressure Monitor
- Pyle Health PHBPB20 Blood Pressure Monitor
- Welch Allyn H-BP100SBP (Series 1700) Blood Pressure Monitor
- Welch Allyn RPM-BP100 (Series 1500) Blood Pressure Monitor
- Zewa UAM-820BT Blood Pressure Monitor

Type 2 diabetes members will have either a BGM or a CGM as their primary device. Their experience will be different depending on which devices they are using.

7.11.1 View device supply

You can see the supply and monitoring of devices that are associated with a member. This product is not intended to collect insulin or glucose data for members in the T1D program. Therefore, users should not use this feature to support members enrolled in the T1D program. To see all the monitoring devices assigned to a member:

1. Open the Member Detail page.
2. In the Member Overview Banner click on the member name and scroll down to "SUPPLIES." For devices:
    - A checkmark means that the member has verified the device and the device should transmit data to the console and app.
    - Click on the device to see more information.

7.11.2 Add a new device

Most devices will be automatically added to the console. However, you can also add a device manually. Please note that OSA devices cannot be added manually. To add a device manually:

1. Open the Member Detail page.
2. In the Member Overview Banner, click on the member name and scroll down to "SUPPLIES."
3. To the right of "SUPPLIES," click the add device button ≡+ .
4. Select the device type.
5. Enter the Device ID. See your Onduo System Administrator for how to obtain the correct Device ID.
6. Select the estimated arrival date.
7. Click **SAVE**.

On the estimated arrival date for a given device, the member will see a banner in their app asking them to connect and verify their new device. This banner can be dismissed but will reappear the next day for 7 days following the expected arrival date. Members can also connect their device in the Setting section of the app.

Once set up and verified by the member, the console will add a green checkmark next to the device. The member app will update automatically to the mode of the new device.

7.11.3 Edit an existing device

This product is not intended to collect insulin or glucose data for members in the T1D program. Therefore, users should not use this feature to support members enrolled in the T1D program. This feature is also not supported for OSA members.

To edit an existing device for a member:

1. Open the Member Detail page.
2. In the Member Overview Banner, click on the member name and scroll down to "SUPPLIES."
3. Click on the device you want to edit.
4. You can then do the following:

- **Set the device as the primary device.** If a device has been verified and is active, you can manually change the device to be the primary device. This will change the app and console mode.
- **Disable or enable the device.** A device can be disabled or enabled at any time. Disabling a BGM will prevent any data from that device from being stored in the console. Devices can be enabled again after they have been disabled. The console is capable of receiving data from multiple devices (there is no need to disable the BGM device just because the member is in CGM mode).
- **Set the estimated arrival date.** This date can be adjusted to control when the member sees the banner asking them to set up the new device.

7.11.4 Ship a new supply or device

Please note that this process is not relevant for OSA devices. To ship a new supply or device:

1. Open the Member Detail page.
2. In the Member Overview Banner, click on the member name and scroll down to "SUPPLIES."
3. To initiate a new supply or device shipment, click the ship supplies button .
4. Fill in the information in the window that appears.

The shipment will appear in the "SUPPLIES" section under "Pending Shipments." Once the supply has shipped, the shipment will be moved to "Completed Shipments" and a tracking link will be displayed.

8 Manage tasks

Use tasks to track the actions you may decide to take for each member, and tasks that have been triggered by the console based on member data as defined by clinical triggers in place.

8.1 View all pending tasks

1. Open the Member Detail page.
2. Next to "TASKS," click the drop-down arrow and select **Pending**.

3. To see more detail about each task, click the drop-down arrow next to the task list item. Details may include:
    - Instructions for how to complete the task
    - Any further description that has been added for this specific task
    - Task priority
    - Task creation date
    - Assignee
    - History of the task

Tasks are listed in order of priority, from most important (1) to least important (10). Tasks are organized in different sections depending on whether it's a current or future task. Each task that is assigned to you can be resolved, reassigned, or scheduled.

You can also see tasks that are assigned to others.

8.2 Resolve a task

1. Open the Member Detail page.
2. Under "TASKS," find the task list item you want to resolve.
3. Check the checkbox ☐ next to the task list item.
4. Scroll up to the action row above the gray line.
5. Click **RESOLVE**.

The task will be removed from the pending task list and will appear in the completed tasks list.

8.3 Reassign a task

Tasks are most commonly assigned to the member's Care Lead. Tasks can be reassigned to any member of the Care Team that has permission to view the member.

1. Open the Member Detail page.
2. Under "TASKS," find the task list item you want to reassign.

3. Check the checkbox ☐ next to the task list item.
4. Scroll up to the action row above the gray line.
5. Click **REASSIGN** in the top of the TASKS section.
6. Under "Assign to," click the drop-down arrow ▼ to select which Care Lead you want to re-assign the task to.
7. Add a note to provide more context.
8. Click **Save**.

Reassigned tasks will remain in the task list under "Assigned to others," but will appear grayed out.

8.4 Schedule or snooze a task

Tasks can be scheduled (or snoozed) for a day and time in the future.

1. Open the Member Detail page.
2. Under "TASKS," find the task list item you want to schedule.
3. Check the checkbox ☐ next to the task list item.
4. Scroll up to the action row above the gray line.
5. Click **SCHEDULE** in the top of the TASKS section.
6. Select when you want to schedule this task.
7. Click **Save**.

8.5 Take a bulk action on tasks

1. Open a Member Detail page.
2. Below the title "TASKS," click the checkbox ☐ in the action row above the gray line.
3. Choose the action to take:
    - **REASSIGN:** Click to choose a different Care Lead to which to assign all the tasks.
    - **RESOLVE:** This resolves all tasks in the task list.

- **SCHEDULE**: This schedules the task for a day and time in the future.

8.6 Add a new task

Depending on how the enterprise owner of the Onduo Disease Management Software Platform and the Onduo or Primasun program chooses to define, customize, and deploy strategies, tasks may be created or added to your task list automatically for you based on a set of business rules.

Tasks will appear automatically in the My Members and Member Detail pages without any action on your part.

You can also manually add a new task:

1. Open the Member Detail page.
2. Next to "TASKS," click the new task button .
3. Under "Task Type," choose the appropriate description from the list available using the drop-down arrow .
4. Under "Priority," select the importance of this task using the drop-down arrow (where 1 is very high priority and 10 is very low priority).
5. Add a title and description.
6. Select the admin to assign to the Task. By default the Task is assigned to the member's assigned Care Lead.
7. Select when you would like to schedule the new task, either "Now" or for a time in the future.
8. Click **SAVE**.

8.7 View completed tasks

You can see the history of which tasks have been completed for the selected member.

1. Open the Member Detail page.
2. Next to "TASKS," click the drop-down arrow and select **Completed** to view the previous 2 weeks of completed tasks

3. To see more detail about each completed task, click the drop-down arrow next to the task list item.
4. To see completed tasks beyond the previous two weeks select **VIEW ALL COMPLETED**, which will display all completed tasks in a new page.

9 Strategies

Workflows are strategies built into the console that include several tasks that are the steps in the workflow. Each step in the workflow will appear under the Tasks section in the console, showing only one task at a time. Resolving one task in the workflow triggers the next task in the workflow.

9.1 Learn about strategy types

Coaching strategies may help you keep track of the ways in which you are actively working with a member to improve his/her health. These strategies then inform the tasks that you may deploy with a member (refer to **Section 6.0**).

The console provides four general types of strategies:

- Member-initiated strategies: A member will initiate these strategies in the app. The strategy details and a member's progress in the strategy is shared with the Care Lead; these details are visible in the console.
- Care Lead-initiated strategies (Shared): These strategies are initiated by the Care Lead in the console and (where appropriate) strategy details are shared with the member. In addition, the strategy may have reminders that a member can turn on in the app.
- Care Lead-initiated strategies (Not Shared): These strategies are initiated by the Care Lead but are not visible to the member in their app. These strategies track Care Lead workflows.
- System triggered strategies (Not Shared): These strategies are triggered by the console.
    - **Medications**
        - This strategy is triggered by the console when a member meets certain criteria, driven by guidelines from International Diabetes Center (IDC) and/or Onduo PC. The triggering criteria are captured in the table below.

        - Once a strategy is triggered, the user will be shown textual indicators as specified by the table below
    - **CGM**
        - This strategy is triggered when all of the following criteria are met
            - Member's T2D condition severity is set as "High"
            - Member is verified to have a supported phone type
            - Member is verified to have a supported state of residence

The substance of these strategies (and the related protocols that each Care Lead takes) is defined, customized, and deployed by the enterprise user of the Onduo Disease Management Software Platform and the Onduo or Primasun program.

9.2 View all strategies and review strategy history

1. Open the Member Detail page.
2. Next to "STRATEGIES," click the drop-down arrow .
    - Select **Active** to see current strategies.
    - Select **Completed** to see the three most recently completed strategies. This includes completed strategies (shown with a green checkmark) and canceled strategies (shown with a gray X icon). To see more detail about each completed strategy, click the drop-down arrow next to the task list item.
    - In order to see older strategies, select **VIEW ALL COMPLETED**, which will display all past strategies in a new page.

9.3 Start a new strategy

1. Open the Member Detail page.
2. Next to "STRATEGIES," click the new strategy button .
3. Choose the strategy category.
4. Choose a strategy type.

5. Choose the start date. If prompted, pick the expected duration of the strategy.
6. Type in the name of the strategy that you want displayed.
7. If prompted, choose whether to show notifications in the member app, and at what frequency.
8. Click **ADD**.

The new strategy will appear in the strategies listed under "Active."

9.4 Monitor active strategies

1. Open the Member Detail page.
2. Next to "STRATEGIES," click the drop-down arrow and select **Active**.

Logging strategies show symbols to track the member's progress. See **Section 1.4** to understand what the symbols mean.

9.5 Cancel an active strategy

1. Open the Member Detail page.
2. Navigate to "STRATEGIES."
3. Click the menu button and select "Cancel strategy".
4. Enter a note or reason for canceling the strategy.
5. Click **OK**.

The strategy will no longer appear as an active strategy and will appear in the completed strategies list with next to the title.

10 Provider and Visit Tracking

You can add, edit or delete a member's providers, including primary care providers, specialists, mental health providers, etc. You can also add, edit or delete provider visits. If a member requests a Spanish interpreter for a video visit, "Interpreter requested" will be displayed below the visit time.

10.1 Adding a new visit

1. Open the Member Detail page.
2. Next to "PROVIDER VISITS," click the add button .
3. Select date and write description.
4. Click **ADD.**
5. All visits appear in chronological order.

10.2 Editing or deleting a visit

1. Open the Member Detail page.
2. Below "PROVIDER VISITS," click on the description
3. Make the desired edits.
4. Click on **DELETE VISIT** to delete the visit.

11 Medications and insulin warnings

All medications and medical supplies stored in the console must be either:

1. Added by the member, or
2. Proposed by a Care Lead and confirmed by the member, or
3. Imported from an external system and confirmed by the member.

11.1 View medications and medical supplies

1. Open the Member Detail page.
2. Navigate to "MEDICATIONS."
3. The "Pending" list shows the medications and medical supplies that have been added by the Care Team or by an external system but not yet confirmed by the member. The "Confirmed" list shows medications and medical supplies that have been confirmed or added by the member.
4. There is a warning at the top of the list reminding you that the list may be outdated and must be reconfirmed ahead of treatment decisions.

11.2 Medications and medical supplies added by the member

Member-confirmed medications and medical supplies will appear under "Confirmed by Member."

Each time a member makes any changes to their medications, you will automatically receive a task to check the member's medications list.

11.3 Propose a new medication

1. Open the Member Detail page.
2. In the header of the "MEDICATIONS" section, click the additional medication button ≡+ .
3. Fill in the medication name/strength, medical provider instructions, and reason for medication list change.
4. Click **ADD**.
5. The medications will appear under "Pending Member Approval." The member will see a notification in the Settings tab of their app to confirm the medication and add medication details.
6. Once a member confirms the medication, the medication will appear under "Confirmed by Member."

11.4 Manage member insulin warning

Some members may take insulin to help them manage their diabetes. To help remind you that a member is taking insulin, you can turn on an insulin warning in the Member Overview Banner. This product is not intended to collect insulin or glucose data for members in the T1D program. Therefore, users should not use this feature to support members enrolled in the T1D program.

If a member has Type 2 diabetes, you can enable or disable the insulin warning:

1. Open the Member Detail page.
2. Navigate to "MEDICATIONS."
3. Click **ENABLE INSULIN WARNING** or **DISABLE INSULIN WARNING.**

(Note: if the member does not have Diabetes this control will not be available on the member's page)

If enabled, an item reading "On Insulin" will appear at the top of this member's detail page, below the member's name and date of birth.

This insulin warning must be enabled manually. It is not automatically enabled if a member adds or confirms insulin as part of their medication list.

11.5 View medication adherence information

You can view medication adherence data under the "MEDICATIONS" header of the Member Detail page.

1. Open the Member Detail page.
2. Navigate to "MEDICATIONS."
3. In the header of the "MEDICATIONS" section, click the adherence button This shows adherence based on the member's medication logs.
4. Additionally, there is a “Merck Nonadherence Likelihood” section under the “MEDICATIONS” header, which indicates the member's likelihood of nonadherence to their prescription medications. This is calculated from the Onboarding and Follow Up Surveys responses.

12 Care Plan and Notes

The care plan section provides fields that you may fill out to give a more complete picture of the member's life. From the care plan, you can choose the coaching strategies that work best for your member. Please note that any treatment or diagnosis information must be documented in the member's Electronic Health Record. Notes are not intended to serve as the official medical record for diagnosis and treatment.

12.1 Create and edit a care plan

All fields in the "CARE PLAN" section are blank at the beginning of the Onduo or Primasun program. To edit:

1. Open the Member Detail page.
2. In the member program detail section, next to "CARE PLAN," click the edit button .

3. Add or change content in any of the fields.
4. When done, next to "CARE PLAN," click **SAVE**.

12.2 View notes

1. Open the Member Detail page.
2. Look for the "NOTES" header.
3. All notes are shown here.
4. Click the expand button to see all notes and their content that have been saved in the console in chronological order.

12.3 Add a new note

1. Open the Member Detail page.
2. Look for the "NOTES" header.
3. Next to "NOTES," click the new note button .
4. Select a label for the note and write the note content.
5. When done, click **SAVE**.
6. Saved notes appear in your notes list starting with the newest notes.

12.4 Edit a note

1. Open the Member Detail page.
2. Look for the "NOTES" header.
3. FInd the note you would like to edit.
4. Click the menu button
5. Select **Edit**. You can only edit notes that you added.
6. When done, click **SAVE.**
7. The note will appear at the top of the notes list, pinned to the time it was edited.
8. Clicking **DISCARD** will discard the edits you are making but keep the original note.

12.5 Pin a Note

Care Leads assigned to members can pin notes to the top of their notes list for easy future reference.

1. Open the Member Detail page.
2. Look for the "NOTES" header.
3. FInd the note you would like to edit.
4. Click the menu button ⋮
5. Select **Pin**.
6. The selected note should be pinned to the top of the notes section.

13 Glucose, blood pressure, pulse, PAP, and event data

You can view, interpret and act on a member's glucose, blood pressure and pulse, PAP data, and life logging event data. This product is not intended to collect insulin or glucose data for members in the T1D program. Therefore, users should not use these features to support members enrolled in the T1D program.

13.1 View member glucose and blood pressure history, PAP data, and event data

To view member glucose, blood pressure, and PAP history:

1. Open the Member Detail page.
2. Click **DAILY CHARTS, WEEKLY CHARTS,** or **EVENTS** to view one day, one week, or all events at a time.
3. In **DAILY CHARTS** or **WEEKLY CHARTS,** use the arrows < > to scroll between different days and weeks. Or, click the date and a calendar view will appear and allow you to choose a specific date.
4. In **DAILY CHARTS** or **WEEKLY CHARTS,** the top of the member history provides a data summary which can include:
    - PAP usage, AHI, and mask leak data - please see 21.4.5 PAP Therapy Trends

    - Readings in range showing the total number of readings taken that day (in day view) or average readings taken per day (in week view).
    - The goal for the number of readings in range per day (usually 2).
    - The goal for the number of hours in range per day (which is set by default to 24 hours but can be changed by the member).
    - The total time spent in range that day (in day view) or average time spent in range per day (in week view). This metric is shown only when continuous glucose data is present.
    - The average glucose reading for the selected duration (day / week). This metric is shown only when continuous glucose data is present.
    - The number of steps taken that day (in day view) or average number of steps taken per day (in week view).
    - The goal for the number of steps taken per day.
    - Blood pressure and pulse readings taken by the member during that day (in day view) or week (in week view). (This will only be displayed for members who have enrolled in the hypertension program.)
    - When continuous glucose data is present in the week view, you can click to toggle between data from **BGM**, **CGM,** or **BOTH**. The metrics shown will adjust to the selection.

5. When continuous glucose data is present in the week view, you can click to toggle between data from **BGM**, **CGM,** or **BOTH**. The metrics shown will adjust to the selection.
6. A star ✪ will appear next to any history item where the goal has been met.
7. If the member is enrolled for management of hypertension, a blood pressure reading section will appear, listing blood pressure and pulse readings taken during the time period.
8. Scroll down below the graphs to "ALL EVENTS FOR TODAY" or "ALL EVENTS FOR THIS WEEK."
9. Here you can see events that took place within the specified daytime period, such as:
    - Blood glucose readings (not Continuous Glucose Readings)

    - Logged exercise, medication, food, mood, blood pressure readings, and any other supported logging categories
    - Messages
    - Notes
    - Changes to the target glucose range, time in range glucose goal and step goal
10. You can toggle whether messages are shown and change the sort order.

The details include:

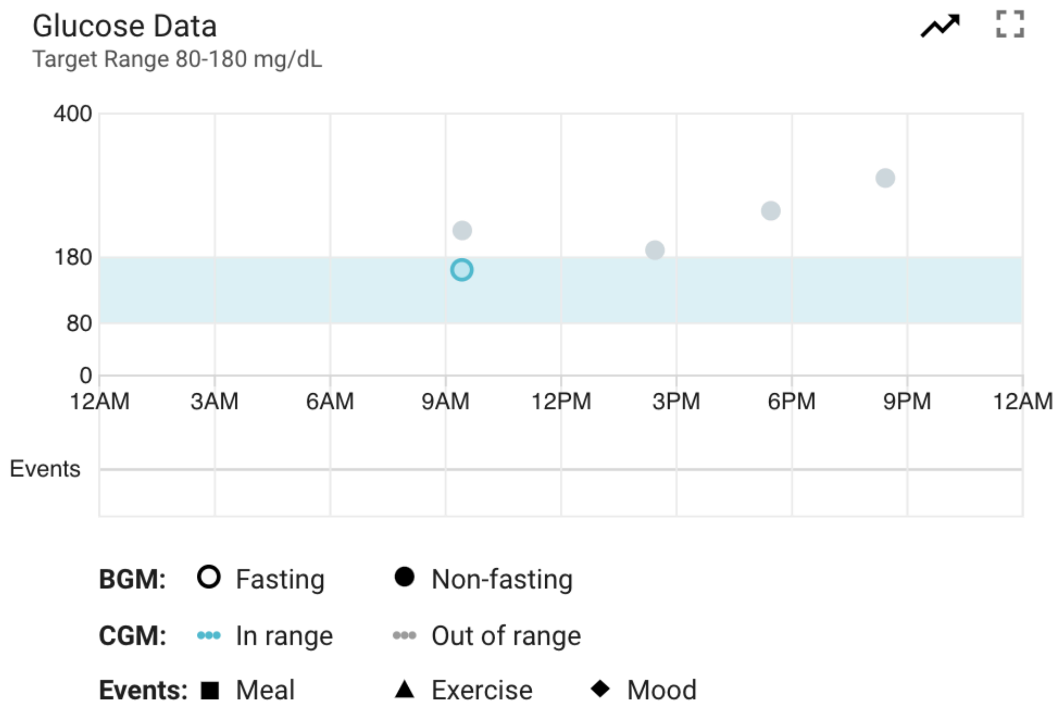
- Time that the meal was logged
- The location that the meal was logged
- The blood glucose reading logged before the meal
- The blood glucose reading logged after the meal
- The change in blood glucose reading before the meal and after
- A photo of the meal, if the member took a photo

To open a large version of the photo in a new tab, click the magnify button .

To send the photo to the member with a comment, click on the menu and select "Send a message."

13.1.1 Day view of BGM

The daily graph for a member with logged events and blood glucose looks similar to this:

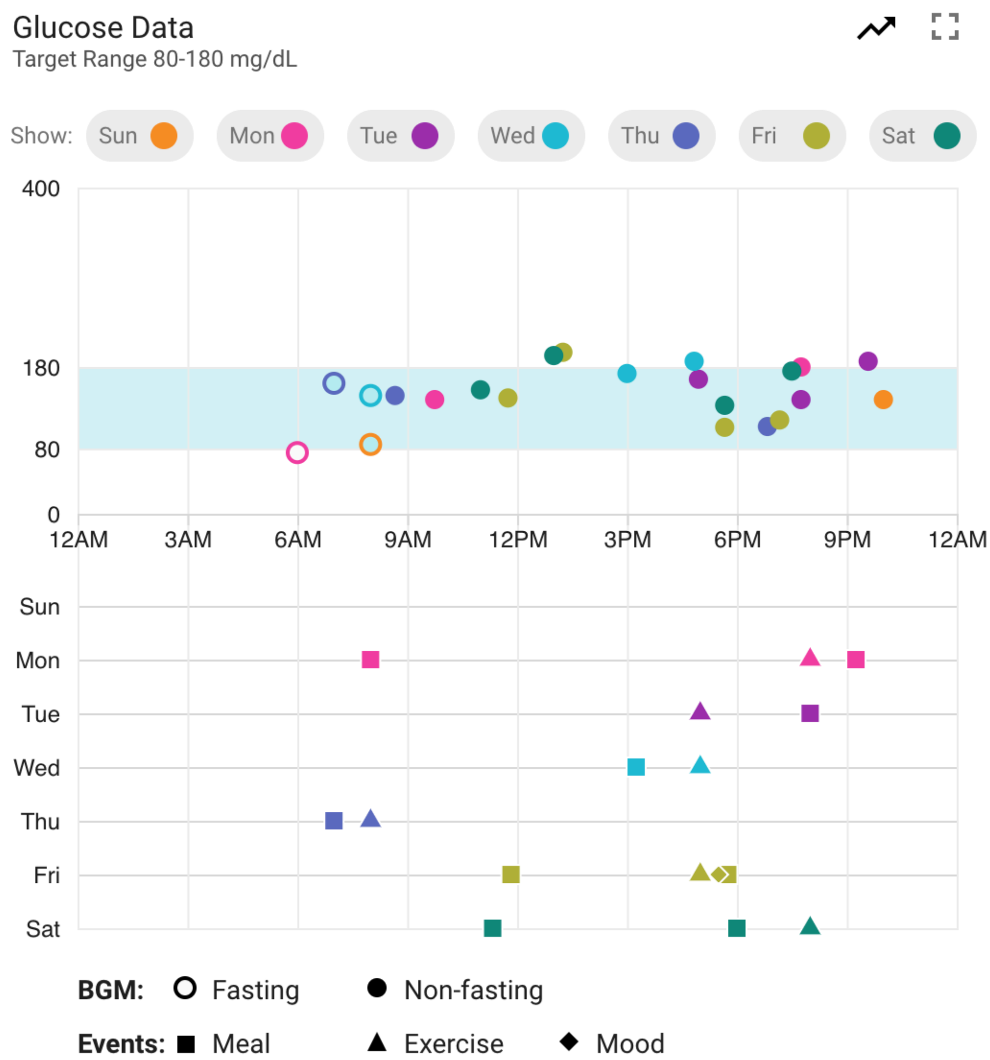


Hover over the symbols to see more information, or click the expand button to make the graph bigger. This product is not intended to collect insulin or glucose data for members in the T1D program. Therefore, users should not use this feature to support members enrolled in the T1D program.

Learn more about the symbols used in **Section 1.4**.

13.1.2 Week view of BGM

The weekly graph for a member with logged events and blood glucose looks similar to this:



See the legend above the graph to match the color of logged events and glucose readings to the appropriate day. Clicking on a day in the legend will toggle that day's data on and off in the graph.

Hover over a single point for more information, or click the expand button  to make the graph bigger

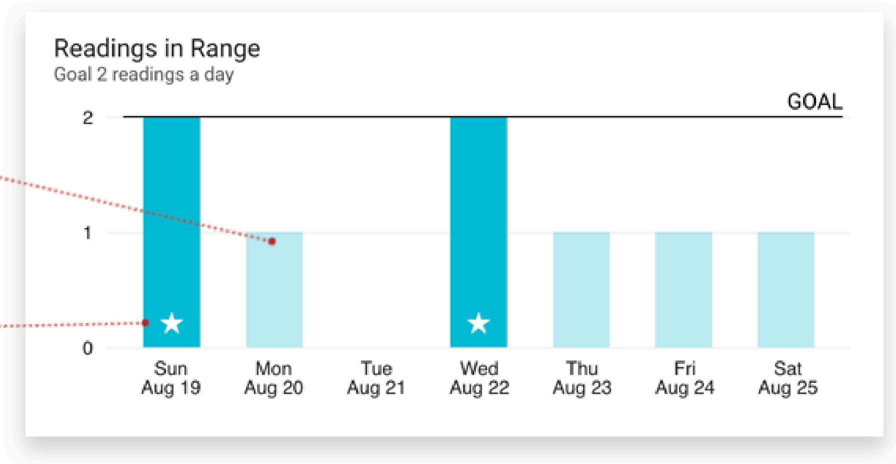
Learn more about the symbols used in **Section 1.4**.

Below the weekly graph, you can also see how a member did against their target range goal (based on the number of blood glucose readings in their target range) and step goal.

Readings in range chart

The light blue bar shows that daily readings in range goal was not met

The darker blue bar with a star indicates that the daily goal was achieved.

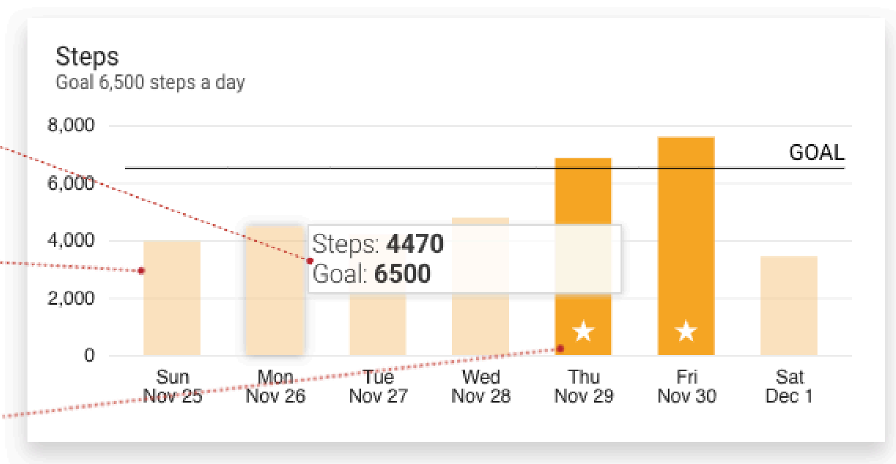


Steps graph

Hover over the graph to see the exact number of steps compared to the steps goal

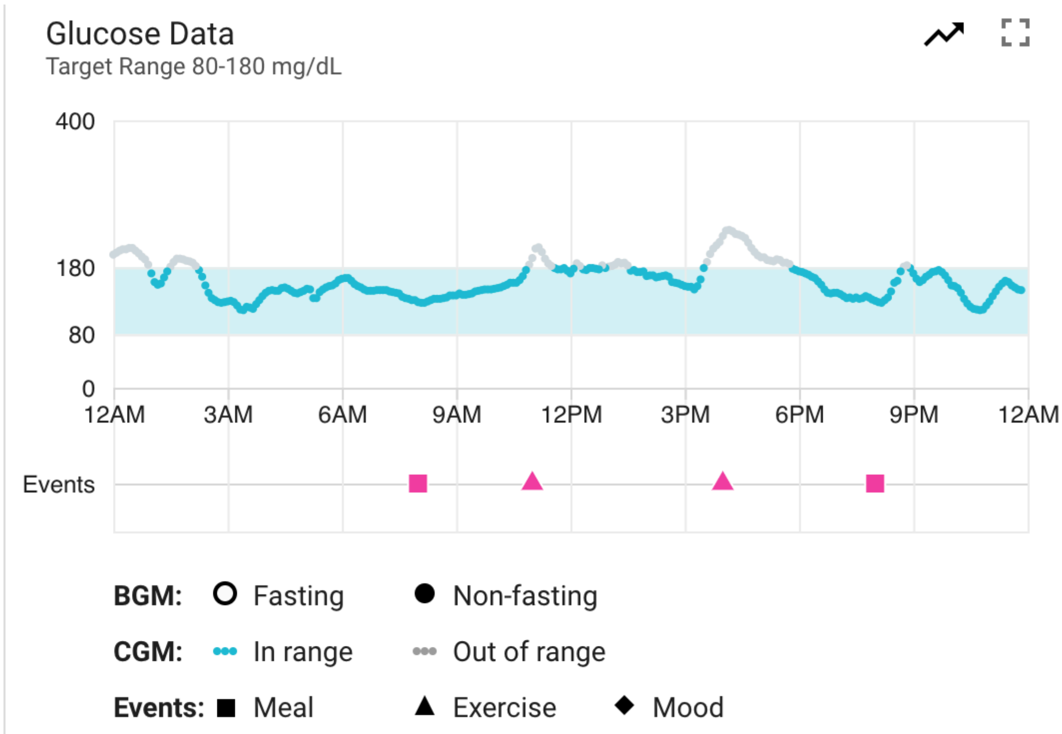
The bar shows the number of steps completed by the member. Light orange bars mean they did not reach the goal.

A dark orange bar with a star means the step goal was attained



13.1.3 Day view of CGM

The daily graph for a member shows glucose readings and other events logged by the member.



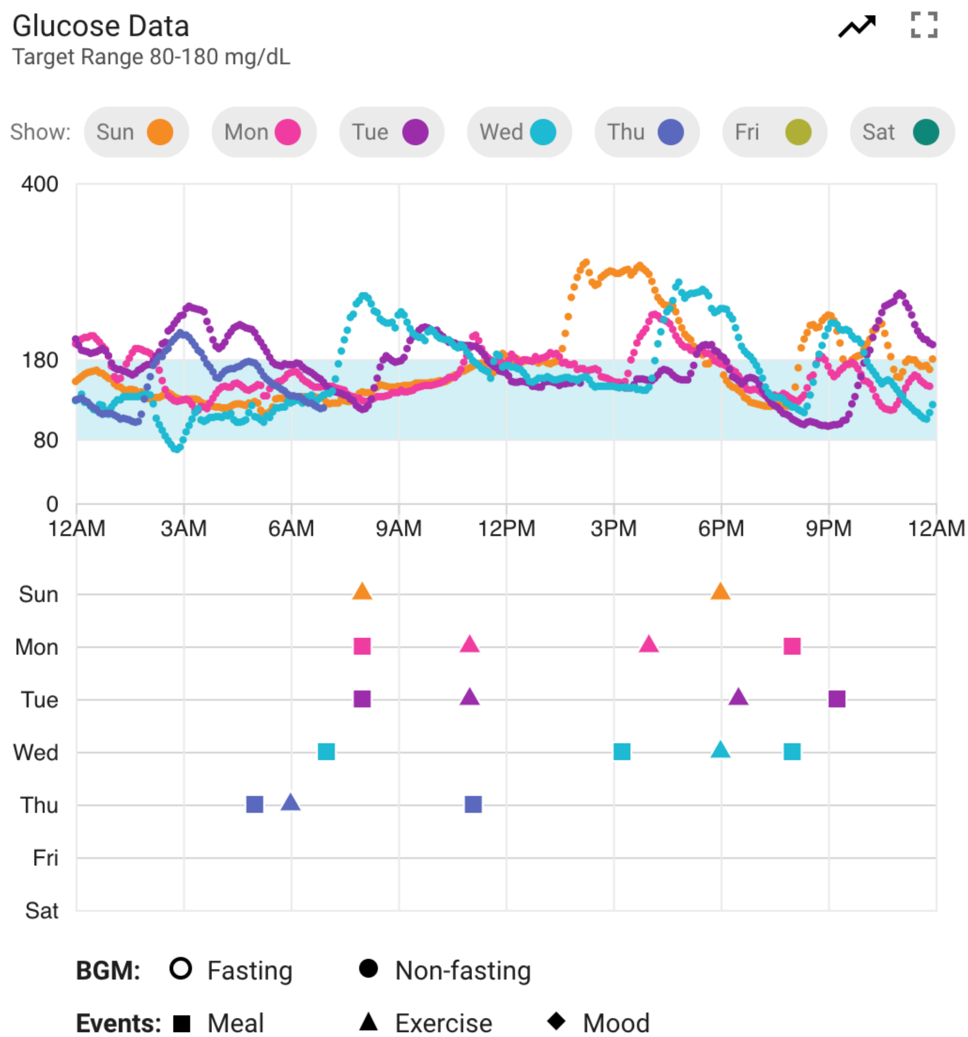
Each dot represents a glucose reading taken by the CGM. Hover over the dots to see more information, including the glucose reading when the reading was taken. Click the expand button ⛶ to make the graph bigger.

Learn more about the symbols used in **Section 1.4**.

The chart below the daily glucose readings displays the number of steps taken throughout the day. Hover over the bars on the chart to see when and how many steps were taken at a given point in time.

13.1.4 Week view of CGM

The weekly graph for a member with logged events and glucose readings looks similar to this:



See the legend above the graph to match the color of logged events and glucose readings to the appropriate day. Clicking on a day in the legend will toggle that day's data on and off in the graph.

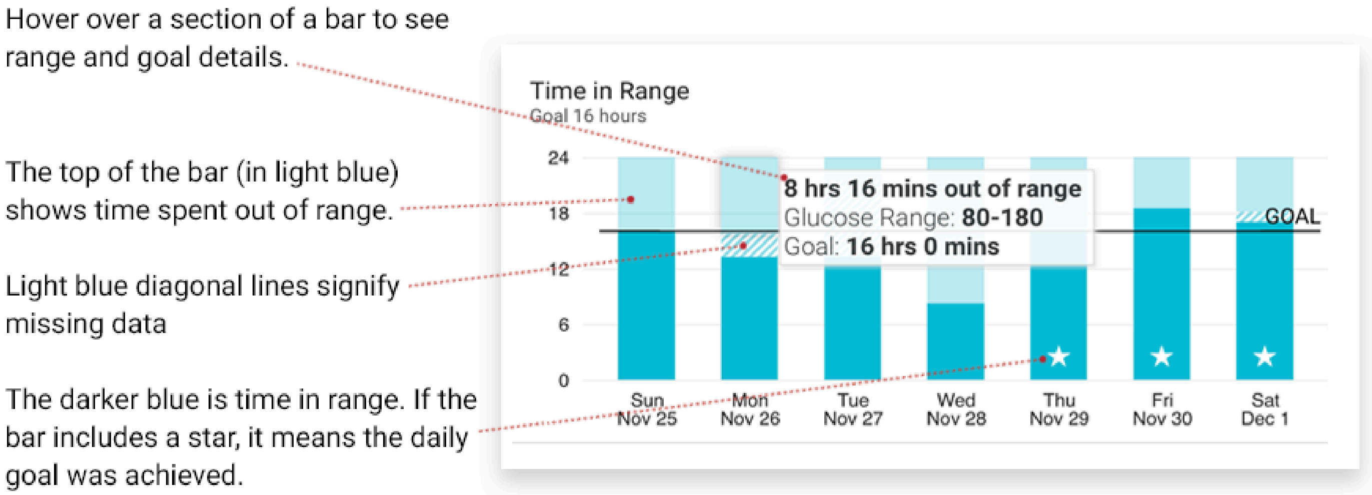
You can toggle between BGM data, CGM data or Both.

Hover over a single point for more information, or click the expand button ⛶ to make the graph bigger.

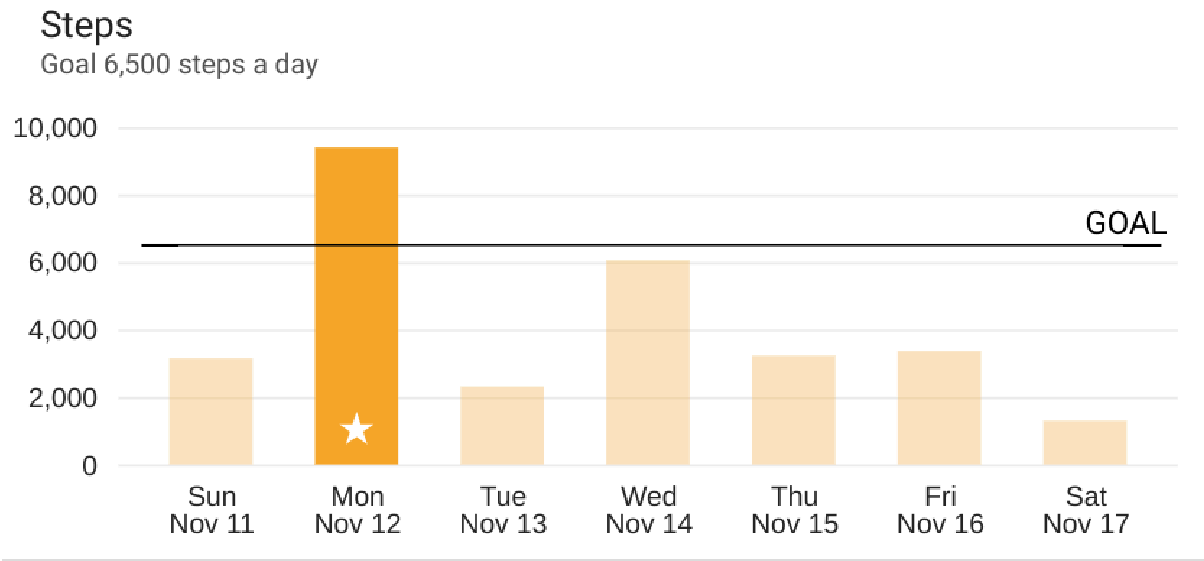
Learn more about the symbols used in **Section 1.4**.

In the weekly view, you can also see how a member did against their target range goal and step goals.

Time in range chart



Steps graph



Note: If a member starts using a CGM without setting up their CGM in the app, the console will show CGM data in addition to all of the BGM and CGM summaries and charts.

Care Lead managers can click on the analysis button  to access an analysis page that shows charts of glucose, steps, and meal logging data over time.

13.1.5 Day view of blood pressure and pulse

If the member has enrolled in Onduo’s hypertension program, a section will appear in the day view showing a list of all blood pressure readings taken that day:

< Thu, Mar 26, 2020 >

Blood Pressure

Time	SYS/DIA (mmHg)	Pulse (BPM)
8:54 PM EDT	128/76 Elevated	74 Normal
7:01 AM EDT	180/100 Crisis	115 High

Each row contains the time of the measurement, the systolic and diastolic blood pressure values, a blood pressure category, and if recorded, a pulse reading and pulse category.

Readings in the “low” and “crisis” categories for blood pressure will trigger review tasks. Readings in the “low” and “high” categories for pulse may trigger review tasks as well, though the thresholds for review tasks are slightly different -- only pulse readings under 55 or over 110 will trigger a review task.

Tapping the icon next to the SYS/DIA column header will display a table of blood pressure categories:

What do blood pressure numbers mean?

The American Heart Association recommends a blood pressure target of **less than 130/80 mmHg** for people with Type 2 Diabetes.

Category	SYS (mmHg)		DIA (mmHg)
Low	Below 90	or	Below 60
Normal	Below 120	and	Below 80
Elevated	120-129	and	Below 80
Stage 1	130-139	or	80-89
Stage 2	Above 140	or	Above 90
Crisis	Above 180	and/or	Above 120

CLOSE

Tapping the icon next to the Pulse column header will display a table of pulse categories:

What do pulse numbers mean?

The American Heart Association recommends a normal resting heart rate between **60-100 BPM** for most people.

Category	Pulse (BPM)
Low	Below 60
Normal	60-100
High	Above 100

CLOSE

13.1.6 Weekly view of blood pressure and pulse

If the member has enrolled for Onduo's hypertension program, a section will appear in the Weekly view listing any blood pressure readings taken that week, as well as an average blood pressure for the week (if there have been at least 2 readings taken):

Sun, Mar 22, 2020 - Sat, Mar 28, 2020

Blood Pressure

AVG BLOOD PRESSURE

139/82 mmHg

Stage 1

Blood Pressure data

Time	SYS/DIA (mmHg)	Pulse (BPM)
Fri, Mar 27, 2020 9:32 PM EDT	126/70 Elevated	68 Normal
Fri, Mar 27, 2020 6:30 AM EDT	88/60 Low	76 Normal
Thu, Mar 26, 2020 8:54 PM EDT	128/76 Elevated	74 Normal
Thu, Mar 26, 2020 7:01 AM EDT	180/100 Crisis	115 High
Wed, Mar 25, 2020	91/54 Low	65 Normal

The data shown for each reading is the same as what's shown in the Day view for blood pressure readings.

13.1.7 Weekly view of PAP, AHI, and mask leak data

If the member has enrolled in the Onduo or Primasun obstructive sleep apnea program, PAP data is viewable in the new console - please see 21.4.4 PAP Therapy Trends.

13.2 Review Reports

The Reports section of the Member Detail page is for generating glucose reports and blood pressure reports, and for viewing surveys, encounter summaries, blood pressure checkpoint reports, PHQ-9 results, and system-generated reports about the member. Reports are listed in chronological order showing Title and Date. Reports can be expanded to show the report contents, and can be opened to show the details of the report.

13.3 Review historical events

To view a member's history of all recorded events:

1. Open the Member Detail page.
2. In the third column at the top, click EVENTS
3. Here you can see events that took place grouped by week, such as:
    a. Blood glucose readings (not Continuous Glucose Readings)
    b. Blood pressure readings
    c. Logged exercise
    d. Logged medication
    e. Logged food
    f. Logged mood
    g. PHQ-9 scores
    h. Messages
    i. Notes
    j. Changes to the target glucose range
    k. Changes to the time in range glucose goal
    l. Changes to the step goal
    m. Other updates (device, timezone, settings)

n. System triggered insights

4. You can choose the type of events that are displayed in the list by using the **FILTER RESULTS** drop down and check the ones you want included.
5. You can choose to sort the list in event date ascending order by un-checking **SORT BY RECENT** checkbox

14 View and edit the member profile

Clicking on the member name in the Banner brings up more data about the member, including their account information, their contact information, their primary care physician, diabetes supplies, and devices.

14.1 View member summary information

1. Open the Member Detail page.
2. In the Member Overview Banner click on the member name.
3. The Account Info summary includes the following:
   - **Onduo ID.** This is the member's unique program identifying code.
   - **Salesforce ID.** This is the member's unique ID in Salesforce.
   - **Enrollment method.** This is the method of enrollment.
   - **Authentication method.** This is the method the member used to sign in at enrollment.
   - **Payor.** This is the organization paying for this member's participation.
   - **Insurance plan.** This is the member's insurance plan.
   - **Insurance group ID.** This is the member's insurance group ID.
   - **Athena ID.** This is the member's ID associated with their Electronic Health Record. There is also an "Open in Athena" link next to the ID, which will open the member's chart in the Athena EHR.
   - **Account status.** This shows whether the member is active.
     - There are instances where Care Leads need to offboard members from Onduo or Primasun; for example, the member is no longer eligible, or they are no

longer interested in the program. To disable an active member account, click **Disable**. To re-enable a disabled member account, click **Enable**.

- **Gender.**
- **User since.** This is when the members started using the program.
- **Last update.** This shows the last time the member's record was edited.
- **Last viewed messages.** This shows the date and time the member last viewed the Messages tab of their app.
- **Phone type.** This is the mobile operating system the member is using to access the program (for example, Android).
- **Phone model.** This is the specific type of phone the member is using (for example, Pixel).
- **Onduo and Primasun App Version**. This is the version of the Onduo or Primasun App the user has installed on their phone.

To open a full history of all changes to the member record, click next to Account Info.

14.2 View or edit the member's care team

1. In the Member Overview Banner click on the member name.
2. The Care Team section includes names and titles of all care providers on a member's Care Team.
3. The POC indicator specifies the care provider who is currently the member's point of contact.
4. To change the current Care Lead, click the **UPDATE CL** button.
5. To join a patient's care team, click the **JOIN CARE TEAM** button.
6. To become the patient's current point of contact, click the **TAKE POC** button. Only the Point of Contact may send messages to the member.
7. To return the point of contact to the patient's Care Lead, click **RETURN POC TO CL**.
8. To leave a patient's care team, click the **LEAVE CARE TEAM** button.

14.3 View or edit the member's contact information

1. These sections include the member's name, email, phone number, and shipping address. Open the Member Detail page.
2. In the Member Overview Banner click on the member name
3. The Member Info includes the member name, email, phone and shipping address.
4. To change the member's contact information click the edit button .
5. Change the fields as needed. When done, click **OK**.

14.4 View or edit the member's health care professional information

In- app forms collect health care provider contact information. Dates and descriptions can be added for tracking a member's visits to their health care providers. Once created, the member's health care professional's contact information (name, address, phone number, provider type) can be viewed, recorded, edited and verified.

1. Open the Member Detail page.
2. In the Member Overview Banner click on the member name
3. Scroll down to "Healthcare Professionals"
4. Healthcare Professional info includes the health care professional name and contact information.
5. This information can be viewed, edited and verified. To edit or verify, click the edit button .
6. Change the fields as needed. When done, click **OK**.

14.5 View and edit key member flags

1. Open the Member Detail page.
2. In the Member Overview Banner, click on the member name.
3. Scroll down to the "Flags" section. Here you can view key clinical information. This information is automatically populated from the member app during onboarding.

4. To edit this information, click the edit button .

14.6 View and edit member health conditions and program focus

1. Open the Member Detail page.
2. In the Member Overview Banner, click on the member name.
3. Scroll down to the “Health Conditions” section. Here you can see the conditions that the member has enrolled in, and which condition is currently their primary focus for management.
4. To edit this information, click the edit button .

Members may have more than one condition in “Primary Focus” status at once. When a member is enrolled in the MBH program, MBH will be set as a “Primary Focus” upon onboarding, alongside the existing starting condition if applicable.

Care team members can manually change the status of a member’s program to “On Hold.” For MBH, this changes behavior so that “On Hold” members will receive the PHQ-9 every 90 days, rather than every two or four weeks based on their last PHQ-9 score. (The care team can always send the PHQ manually if needed regardless of whether the member is in Primary Focus or On Hold status. Please see Section 3.1 Overview/Device Description for details on manually sending the PHQ.

For other programs, updating the program status does not change the behavior of the Console or member app, though it may impact billing for clients whose billing logic depends on program status (the *initial* Primary Focus condition is used to determine which devices are shipped for non-MBH conditions).

15 Messages

You can send text, image, video and education card messages to members through the console. Please note that Onduo PC direct care providers should not send messages for MBH members.

At the top of the messages section, you can see the local time and timezone for the member. The member's phone sets this and can change when the member changes the time or timezone on their phone.

For your own reference, you can use notes to record an interaction with a member. For example, use a note to record what happens during a phone call with a member. Please note that member messaging and notes are not intended to be used as the official medical record for diagnosis and treatment, and that communications for diagnosis and treatment must be communicated in the electronic medical record.

15.1 Send a message

To send a message to a member:

1. Open the Member Detail page.
2. Check if you are the point of contact (POC) by navigating to the Care Team section in the profile dropdown menu. If not you are not the POC, then click TAKE POC.
3. Click **"Send a message"** in the bottom right to begin composing a message.
4. Type the message you want to send. Tip: Because the member will see this on their phone, it's best to keep messages short.
5. If you want to attach an image, click the image button .. You can choose an image from your computer or copy one from your clipboard.
6. If you want to send a link, click the link button . You can choose a predefined link or copy your own from your clipboard.
7. If you want to send an education card click the education card button .

8. You can search, browse or filter to find the right education card. You can also send a card pack instead
9. When you're ready, click Send .

The message might take a few seconds to appear in your message history.

15.2 Message a member about an event in their daily details

Most events in a member's history can be sent to the member with a message. To send a timeline event as a message:

1. Open the Member Detail page.
2. In the third column at the top, click **DAILY CHARTS** and use the arrows to scroll to the day you want to view.
3. Scroll down the page to the event you want to message the member about and click the menu button ⋮.
4. Select **Send a message**.
5. In the window that appears, type a message.
6. Click **SEND**.

The event will appear in the messages section of the console with your message appended. This will also appear as a message in the member app.

15.3 View message history

Scroll up in the message section to see older messages in your message history.

To search for something in your message history, you can use the find functionality built into your browser.

16 Video visits

1. If you are a physician, psychiatrist, therapist (PhD., LICSW), pharmacist, Licensed Mental Health Clinician, or sleep physician, your messaging section on the member detail page will always have an additional tab labeled "Video." For other console user types, the tab will be shown only if you have an upcoming video visit scheduled with that member.
2. Appointments scheduled for today with that member will be listed there. 10 minutes before the appointment until 5 minutes after the appointment end time, a "Start visit" button will be displayed.
3. Click this to join the visit with the member.
4. If the member requested a Spanish interpreter, a modal will pop-up with a button to “Call interpreter”. Clicking this button will auto-dial a Spanish interpreter.
5. A red dot indicator will be visible during active video sessions.

17 Member Search page

The Member Search page allows you to filter, search and take actions on the members visible to you.

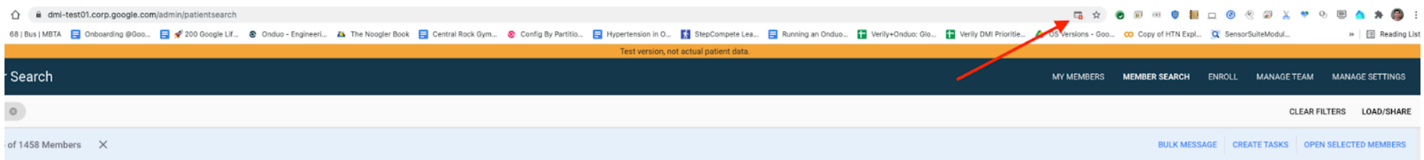
17. 1 Use the filter and search functions

1. Open the console.
2. In the top right, click **Member Search**.
3. By default you are shown all members that you have permission to view (according to your role) that are not disabled. You are shown 20 members per page by default.
4. You can change the rows per page by clicking on that field at the bottom of the table.
5. The table can be sorted by any column by clicking on the column header.
6. You can adjust the columns and the column order by selecting the gear representing “Manage Columns” 
7. You can add filters to view a subset of members by clicking in the search bar. A drop down appears showing you your filter options. Some filters ask for text to search on. All filters appear as chips in the search bar.

8. Filters can be individually cleared by clicking on the “x” or cleared all at once by clicking “CLEAR FILTERS” on the right side of the search bar
9. A shareable query string can be obtained using the “LOAD/SHARE” button above the search results. Copying that string from one Member Search page to another will show the user a table of members that they have permission to view using the same filtering criteria.
10. To open the member detail page, click the member ID.
11. To open the Care Lead detail page, click the Care Lead name.

17.2 Take action on a member

1. Open the console.
2. In the top right, click **Member Search**.
3. Filter and search to create the desired table of members.
4. Select one or more members by clicking in the checkboxes on the left side of each row.
    - Note: you can also select all members on a page by selecting the checkbox in the title row.
5. The number of members selected is shown above the table.
6. Options to CREATE TASKS or OPEN SELECTED PATIENTS appear above the table. Care Leads and Care Lead Managers also have options to SEND BULK MESSAGE.
7. To create a task for the assigned Care Lead for all selected members, select **CREATE TASKS in the option that appears above the table**. A dialogue opens where you can input the details of the task.
8. To open multiple member details pages, select **OPEN SELECTED PATIENTS** in the option that appears above the table. Each member detail page will open in its own tab. You will be prevented from opening more than 10 new tabs at a time.
    - Note: your browser may block multiple pop-ups from being opened, and you will need to allow them



18 Manage Team page

If you are a Care Lead Manager or Partition Manager, the "Manage Team" page shows all the Program Administrators (shortened to admins) and includes all Coaches, Coach Managers, Customer Support Representatives, Content Managers, and Partition Managers, and View-Only Admins that have access to the system. This page also shows all Disabled admins.

From here, there are a few options:

- Group admins by role
- Show additional details about the admins
- Re-assign members to a new admin
- Access the admin detail pages.

18.1 View active and disabled admins

1. Open the console.
2. In the top right, click **MANAGE TEAM**.
3. See the following tables of Program Administrators:
    - Coaches
    - Coach Managers
    - Customer Support Representatives
    - Partition Managers
    - Content Managers
    - View-only Admins
    - Disabled Admins
4. Under each header, you can click the column title to sort by admin ID, name, email, job, number of assigned members, and whether or not the admin is accepting new members.

18.2 Edit an admin's profile

Care Lead Managers and Partition Managers can change information about the admins to customize admin profiles for use in the Onduo program.

Care Lead Managers should review the admin profiles to make sure information, specifically Title and name are correct.

From the "Manage Team" page, click the admin ID in the first column to open their profile. From here, you can view admin information, including:

- Name
- Profile photo
- Email address
- Phone number
- Role
- Care Pod Lead
- An option for Care Leads and Care Lead Managers to accept or not accept members
- Away/Out of Office Message
- Care Lead Bio containing information that is presented to the member
- A table of assigned members

From this page you can view the admin **HISTORY** or **EDIT** the admin profile.

Note: The admin ID is automatically assigned and can't be changed.

18.3 Reassign members

If you are a Care Lead Manager or Partition Manager, you can reassign one or more members from any table of assigned members.

1. Open the console.

2. In the top right, click **MANAGE TEAM**.
3. Click the admin ID of the admin's member list that you want to view.
4. Select one or more members from the list (Note: you can also select all by choosing the top check box).
5. Choose **REASSIGN.**
6. Fill out the details of the reassignment.
    - If you choose "Never," the reassignment will be permanent.
    - If you choose an end date, the reassignment will be temporary.
    - Reassignment can be scheduled in the future.
7. Labels will show temporary and scheduled reassignment.
8. Temporary and scheduled reassignments can be canceled from this page as well.

18.4.0 Set up an out of office auto-reply

If you plan to be unavailable for a given amount of time, you can set an away / out of office message to be displayed in the Onduo and Primasun apps on the Messages tab for all your assigned members.

18.4.1 Set up an out of office message

If you are a Care Lead or Customer Support Representative:

1. Open the console.
2. In the top right, click **ADMINS.**
3. Select "Edit My Profile."
4. Compose your message.
5. Check the "Out of Office" box.
6. Click **UPDATE**.

If you are a Care Lead Manager or Partition Manager:

1. Open the console.
2. In the top right, click **MANAGE TEAM.**
3. Click the admin ID of the admin's profile that you want to edit the out of office message.

4. Choose "Edit."
5. Compose the desired message.
6. Check the "Out of Office" box.
7. Click **SAVE**.

The message will automatically appear at the top of the message screen in the member's Care Lead tab until the out of office message is disabled. A banner is also shown at the top of the assigned Care Lead’s My Members Page.

18.4.2 Turn the out of office message off

To turn an out of office message off for either yourself or another admin's profile, deselect the "Out of Office" box in the admin's profile.

18.5 View an admin's profile history

If you are a Care Lead Manager, you can see the changes that were made to any admin's profile.

To view an admin's profile history:

1. Open the console.
2. In the top right, click **MANAGE TEAM**.
3. Click the admin ID of the admin's profile that you want to view.
4. In the top right of the admin profile page, click **HISTORY**.
5. Scroll down to see a list of changes made to the admin's profile over time.

19 Admin page

If you are a Care Lead, Customer Support Representative, or Content Manager, the "Admin" page allows you to view the other admins in the system. You can only make changes associated with your own profile. If you need to make changes to other admin profiles, please contact your manager.

19.1 View and edit your profile

1. Open the console.
2. In the top right, click **ADMIN**.
3. Your information appears, such as:
    - Admin ID
    - Name

      Please enter your title, one of :

        Care Lead

        Care specialist

        Licensed Mental Health Provider

        Therapist

        Psychiatrist

        Endocrinologist

        CDCES (Certified Diabetes Education Specialist)

        RN (Registered Nurse)

        Pharmacist

        Doctor

        Respiratory Therapist

      Followed by First name and last name
    - Profile photo
    - Email address
    - Phone number
    - Role
    - Care Pod Lead
    - Options for Care Leads and Care Lead Managers to accept or not accept particular groups of members
    - A table of assigned members
    - Out of Office Message
    - Care Lead Bio containing information that is presented to the member
4. To open a full history of all changes to your profile, click **HISTORY** in the top right.

5. To change any of your profile information, click **EDIT** in the top right.

19.2 View assigned members

Your members are shown below your profile information.

To sort members, under "Assigned Members," click one of the column headers (for example, Name).

20 Manage Settings page

If you are a Partition Manager or Content Manager, the "Manage Settings" page allows you to view, edit, export, and create educational content associated with the partition. Partition managers can also view CGM and MD Referral whitelists.

20.1 View, create and edit education content

1. Open the console.
2. In the top right, click **MANAGE SETTINGS**
3. Click on SHOW CONTENT LIBRARY
4. All education cards associated with the partition are displayed
5. To modify the contents or attributes of an education card, click **EDIT** on that card
6. To create a new education card, click **CREATE NEW CARD**

21 New console

The Member Details page in the new console UI is split into the following sections

1) Member Overview Banner
2) Trends
3) Care Plan
4) Meds
5) Profile
6) Devices

7) Console V1

21.1 Care Console v2 Training, Documentation Resources

You can access IFU Guide from any page within the new console by clicking on the Help icon located in the lower left of the screen (see image image#1).

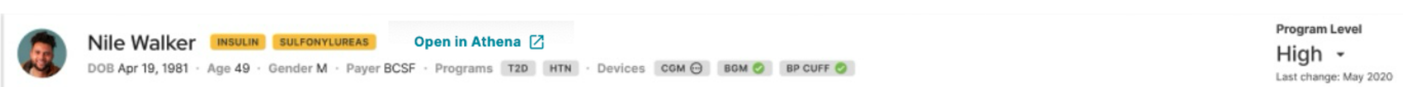
Clicking the help icon will display the IFU (see image #2)

1. Scroll to list the full Table of Content.
2. Select a Tile Topic in the Table of Contents.
3. Click the Maximize icon for full screen mode.
4. Use the breadcrumb navigation icon to go back and forth between pages.
5. Enter key words in the search fields to get answers to your specific questions.

21.2 Accessing the New Console UI

When accessing the original Console, Care Leads will be automatically redirected from Console v1 to the Member List/Member Search page in the new Console.

21.2 Member Overview Banner



The member overview banner shows important information about the member at a quick glance. If the member is on critical medications, the meds are displayed next to the member name. It also shows payer information, the programs they are enrolled in, and the devices they use.

21.2.1 Photo (or avatar), member name, date of birth, age, and gender

The member controls these elements or are entered at the time of registration. After registration, Care Leads may edit the member name. Communicate with your Onduo System Administrator if you believe there are errors in these fields.

21.2.2 “Open in Athena” link

Clicking this link will open the patient’s record in Athena.

21.2.3 Manage Support Tier

You can change a member’s Support Tier to low, moderate, or high by clicking “edit” on the Support Tier dropdown or by clicking “edit” next to Support Tier on the Profile page.

21.3 Member List page

The Member List page provides an overview of members that may require your attention. This page also allows you to search for specific members.

Based on what tasks are open for each member, the console assigns a priority number to the member ranging from 1 (very high priority) to 10 (very low priority).

21.3.1 Manage your members

Once you open the Member List page, the default view is “My members panel” with “assigned to me” filtered on. This is showing members assigned and escalated to you in the following buckets:

- **Highest priority:** Members with a pending task related to hypoglycemia, hyperglycemia, hypertension crisis, hypotension crisis, high pulse rate, low pulse rate, MBH telemedicine task, and/or members automatically referred to MBH direct care.
- **Members escalated to me:** Members assigned to another Care Team member that has escalated a task to you. This section only appears for Care Team Managers, Partition Managers, and Customer Support Representatives.
- **Comanaging POC:** Members for whom you are the Point of Contact, but are not the assigned Care Lead.

- **New Messages:** Members that have a "Respond to message" pending task but do not appear in the above tables.
- **Comanaging**: Members to whom you are assigned as Care Lead, but are not the point of contact
- **Pending Tasks:** Members that have not messaged a coach within 30 days with any pending tasks that do not appear in any of the above tables.
- **Inactive Members:** Members that have not messaged a coach in 30 days without any pending tasks that do not appear in any of the above tables.

You can use the find functionality built into your browser to find specific information on this page.

21.3.2 Sort members

By default, members in each table are sorted by priority. For more information see "Understand Member Prioritization."

To sort members, under "My members," click one of the column headers (for example, **Member Name** or **Time Zone**).

21.3.3 Open a Member Detail page

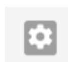
To open a Member Detail page:

6. Open the console.
7. In the page heading, click **My Members**.
8. Sort, search, or navigate to a member in your list.
9. Click the member's ID number in blue.
10. The Member Detail page will open in a new Chrome tab.

21.3.4 Search for members

The Member List allows you to filter, search and take actions on the members visible to you.

21.3.4.1 Use the filter and search functions in Member List page:

1. Select the “All members” view.
2. Start to type in the key search term.
3. By default you are shown all members that you have permission to view (according to your role) that are not disabled. You are shown 50 members per page by default.
4. You can change the rows per page by clicking on that field at the bottom of the table.
5. The table can be sorted by any column by clicking on the column header.
6. You can adjust the columns and the column order by selecting the gear representing “Manage Columns” 
7. You can add filters to view a subset of members by clicking in the search bar. A drop down appears showing you your filter options. Some filters ask for text to search on. All filters appear as chips in the search bar.
8. Filters can be individually cleared by clicking on the “x” or cleared all at once by clicking “CLEAR FILTERS” on the right side of the search bar
9. A shareable query string can be obtained using the “LOAD/SHARE” button above the search results. Copying that string from one Member Search page to another will show the user a table of members that they have permission to view using the same filtering criteria.
10. To open the member detail page, click the member ID.
11. To open the Care Lead detail page, click the Care Lead name.

21.3.4.2 Take action on a member

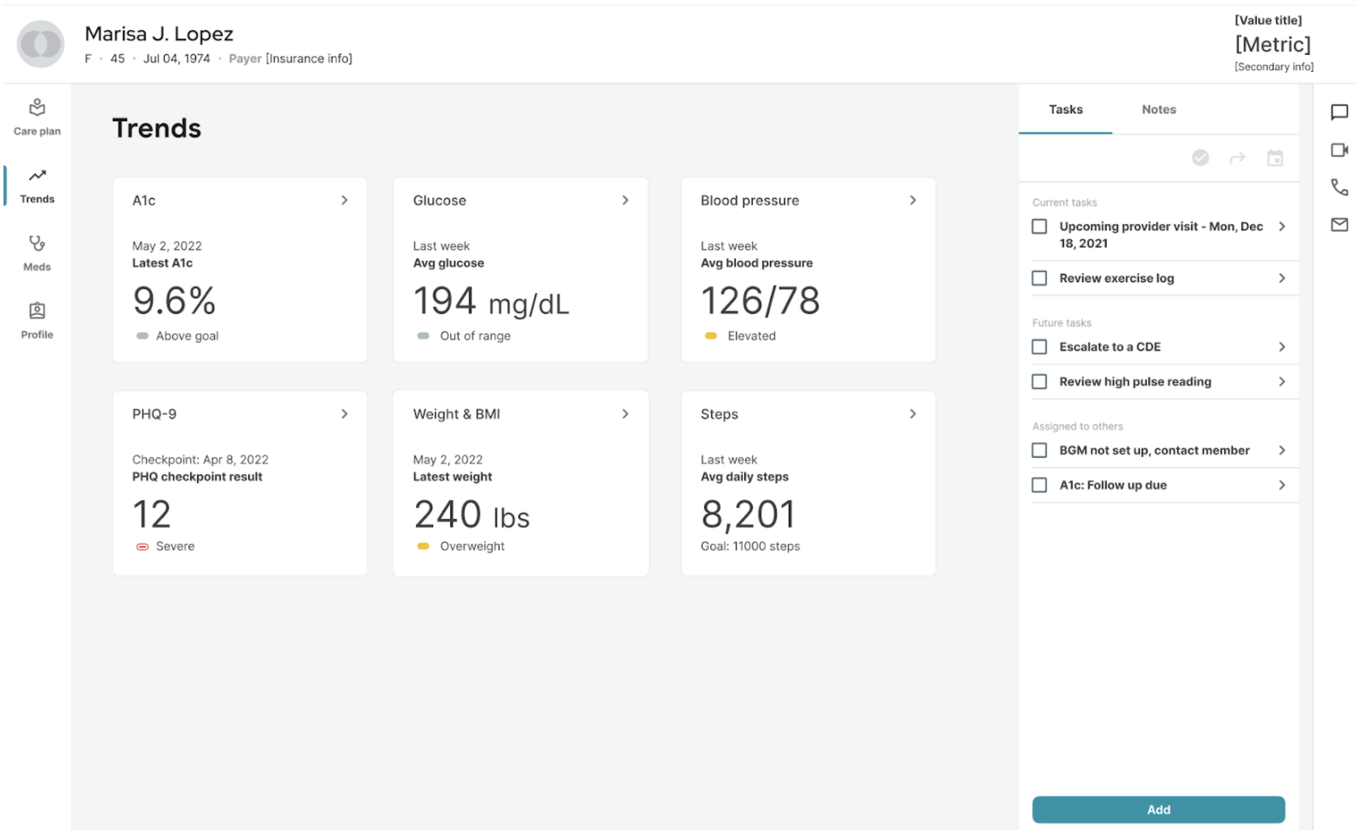
1. Filter and search to create the desired table of members in the Member List page.
    - Note: After your filters are applied, you will see a banner that indicates you’re currently in a filtered view with a link to go back to the members panel.
2. Select one or more members by clicking in the checkboxes on the left side of each row.
    - Note: You can also select all members on a page by selecting the checkbox in the title row.
3. The number of members selected is shown above the table.

4. Options to CREATE TASKS or OPEN SELECTED PATIENTS appear above the table. Care Leads and Care Lead Managers also have options to SEND BULK MESSAGE. Onduo Partition Managers have options to BULK REASSIGN CARE LEAD, CANCEL CARE LEAD REASSIGNMENT, and to DISABLE ACCOUNTS.
    - Note: An error message will display if you're not allowed to take certain bulk actions.
5. To create a task for the assigned Care Lead for all selected members, select **Action types** from the options that appear above the table, and choose **CREATE TASKS.** A dialogue opens where you can input the details of the task.
6. To open multiple member details pages, select **OPEN SELECTED PATIENTS** in the option that appears above the table. Each member detail page will open in its own tab. You will be prevented from opening more than 10 new tabs at a time.
    - Note: your browser may block multiple pop-ups from being opened, and you will need to allow them
7. To reassign selected members to a different care lead, select **Action types** from the options that appear above the table, and choose **REASSIGN CARE LEAD.** A dialogue opens where you can choose the new care lead for the member to be assigned to.
    - You can choose between reassigning permanently or temporarily.
    - The member's current point of contact will not change because of a care lead reassignment.

21.4 Trends

21.4.1 Trends Summary

This tab is now the first tab in the Member Details page. Clicking on the Trends tab opens the Trends Summary page, which includes high-level metrics for key health metrics (e.g. blood glucose, blood pressure, A1C, steps, PAP therapy). You can click on any of these cards to view more detailed data.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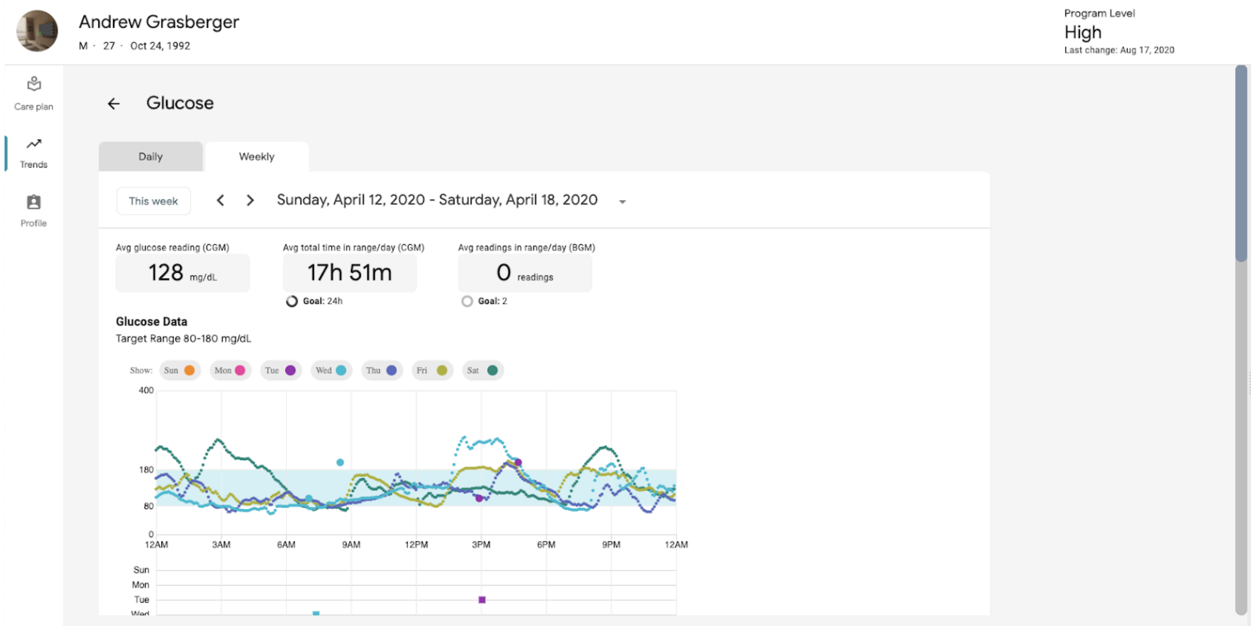
F · 45 · Jul 04, 1974 · Payer [Insurance info]
[Value title]
[Metric]
[Secondary info]
Care plan
Trends
Meds
Profile
Trends
A1c
May 2, 2022
Latest A1c
9.6%
Above goal
Glucose
Last week
Avg glucose
194 mg/dL
Out of range
Blood pressure
Last week
Avg blood pressure
126/78
Elevated
PHQ-9
Checkpoint: Apr 8, 2022
PHQ checkpoint result
12
Severe
Weight & BMI
May 2, 2022
Latest weight
240 lbs
Overweight
Steps
Last week
Avg daily steps
8,201
Goal: 11000 steps
Tasks
Notes
Current tasks
Upcoming provider visit - Mon, Dec 18, 2021
Review exercise log
Future tasks
Escalate to a CDE
Review high pulse reading
Assigned to others
BGM not set up, contact member
A1c: Follow up due
Add

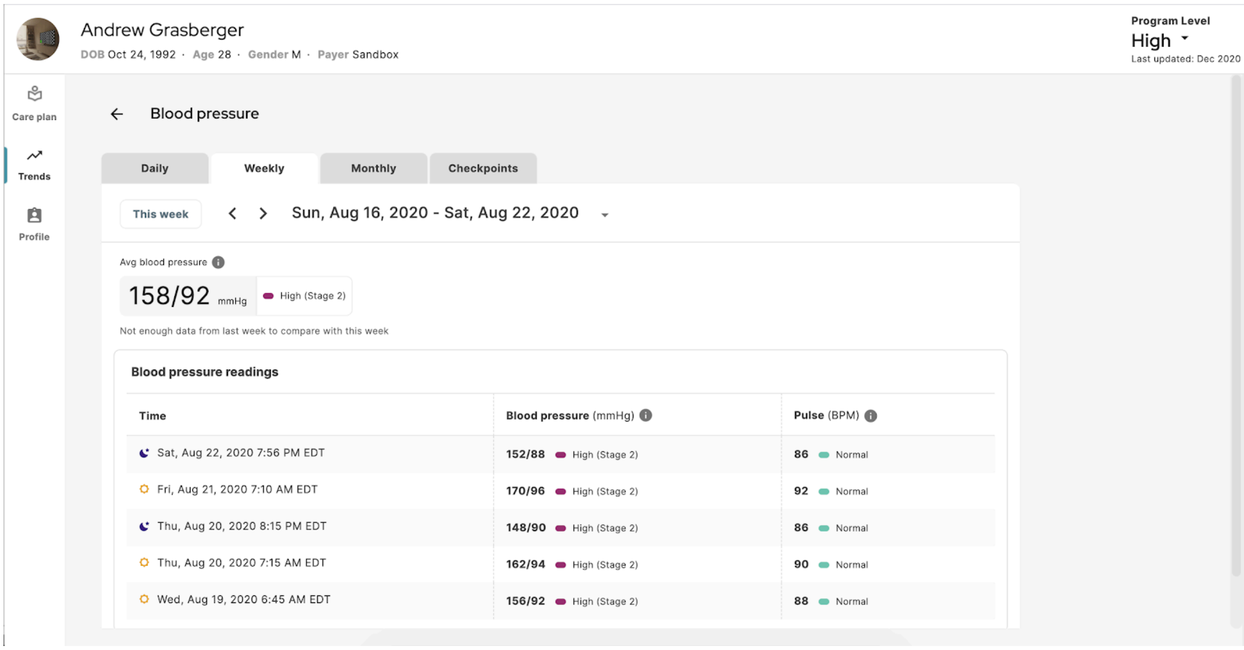
21.4.2 Blood Glucose Trends



The Blood Glucose Trends page displays detailed blood glucose data, either for a specified day or week (Daily and Weekly tab, respectively). This product is not intended to collect insulin or glucose data for members in the T1D program. Therefore, users should not use this feature to support members enrolled in the T1D program. You can use the arrows to scroll to the previous or next day/week, or you can click the day/week to select a new day/week to view. The blood glucose data includes:

- Blood glucose summary metrics - Includes metrics such as average glucose reading, time in range, and readings in range.
- Glucose data - Displays BGM and CGM data, along with logged member events. In the weekly view, you can toggle on/off data by day.
- Readings in range graph - In the Weekly tab, you can view the number of readings in range per day compared to the goal.
- Time in range graph - In the Weekly tab, you can view the time in range per day compared to the goal.

21.4.3 Blood Pressure Trends



The Blood Pressure Trends page displays detailed blood pressure data.

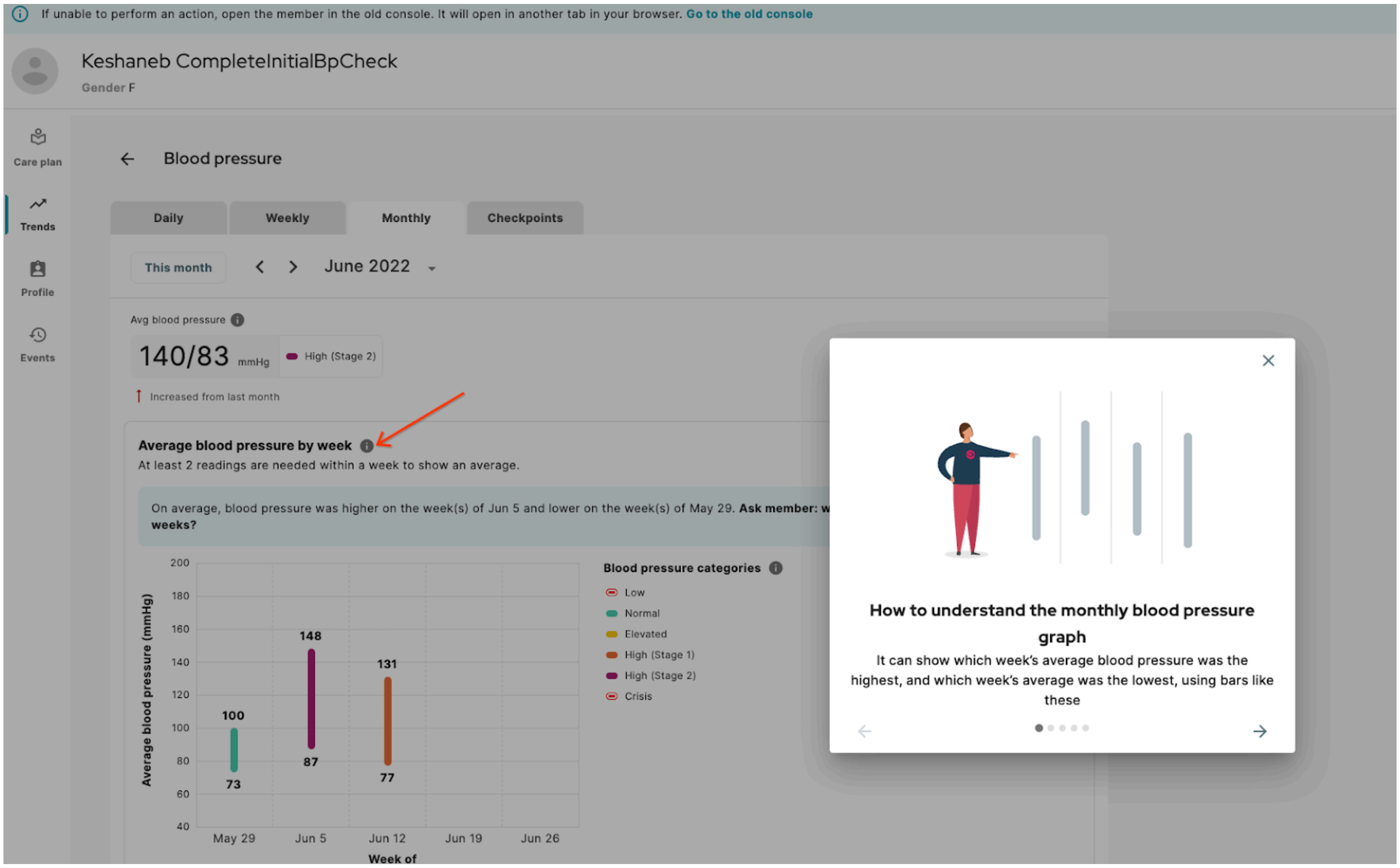
The Daily, Weekly, and Monthly tabs display details of the member's historical blood pressure readings. You can use the arrows to scroll to the previous or next day/week/month, or you can select a specific day/week/month from the dropdown. The BP data includes:

- Blood pressure readings - Displays a table of BP readings, including BP value, BP category, pulse, and pulse category, in reverse chronological order.
- Blood pressure averages - Displays the member's average BP and associated BP category over the given time.
- Blood pressure trends - Displays a graph of BP averages over time.

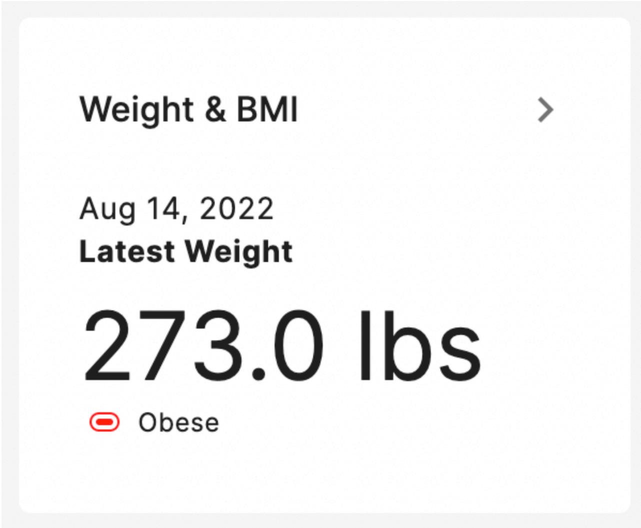
The Checkpoint tab displays details of the member's historical blood pressure checkpoints.

- Blood pressure checkpoints - Displays a table of BP checkpoints, including BP checkpoint average, BP category, BP checkpoint status, and link to the BP checkpoint report.
- Blood pressure checkpoint trends - Displays a graph of BP checkpoint averages over time.

Click the informational icon next to the Average blood pressure by month/checkpoint header (see screenshot below) to view a tutorial on how to understand the monthly and checkpoints blood pressure graphs.



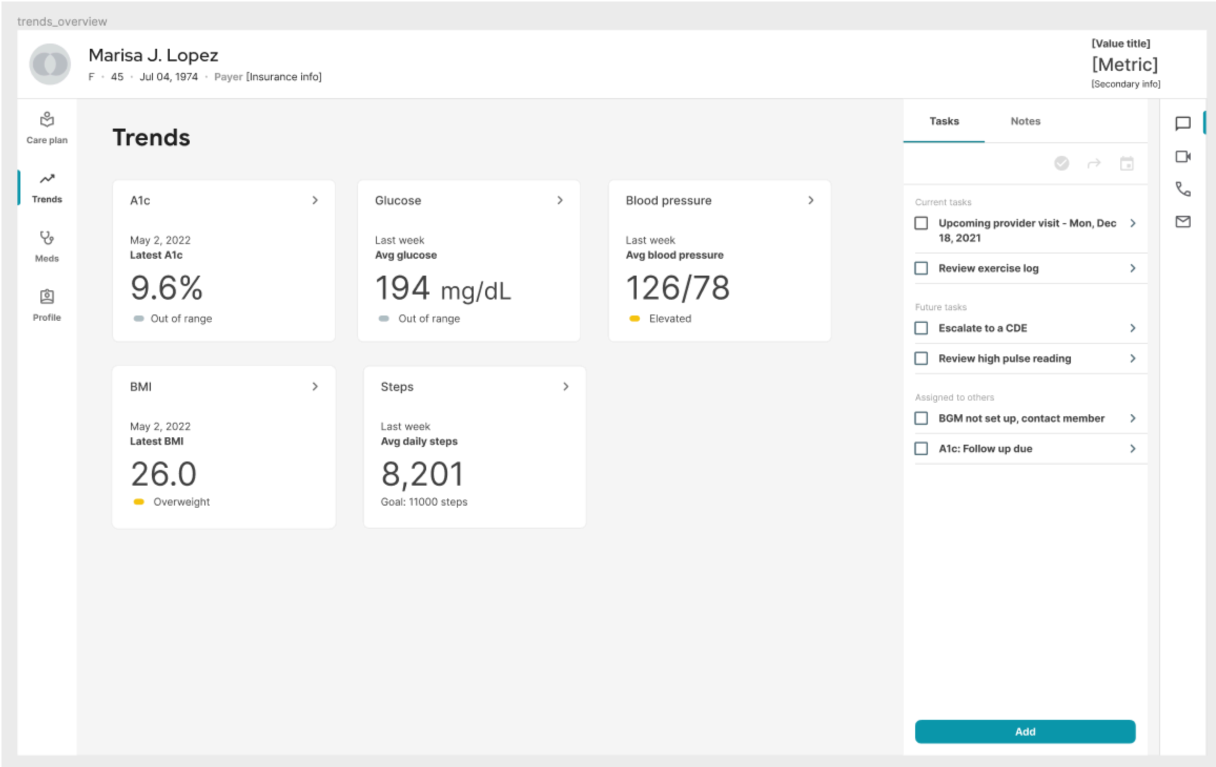
21.4.4 Weight & BMI Trends



Weight & BMI summary card

The Weight & BMI summary page displays the member's most recent weight and BMI data, along with the date it was collected. This page includes a color-coded flag that indicates the member's BMI status:

- **Obese** - red color flag if BMI value is 30 or higher
- **Overweight** - yellow color flag if BMI value is between 25 and 29.9
- **Normal** - green color flag if BMI value is between 18.5 and 24.9
- **Underweight** - red color flag if BMI value is lower than 18.5

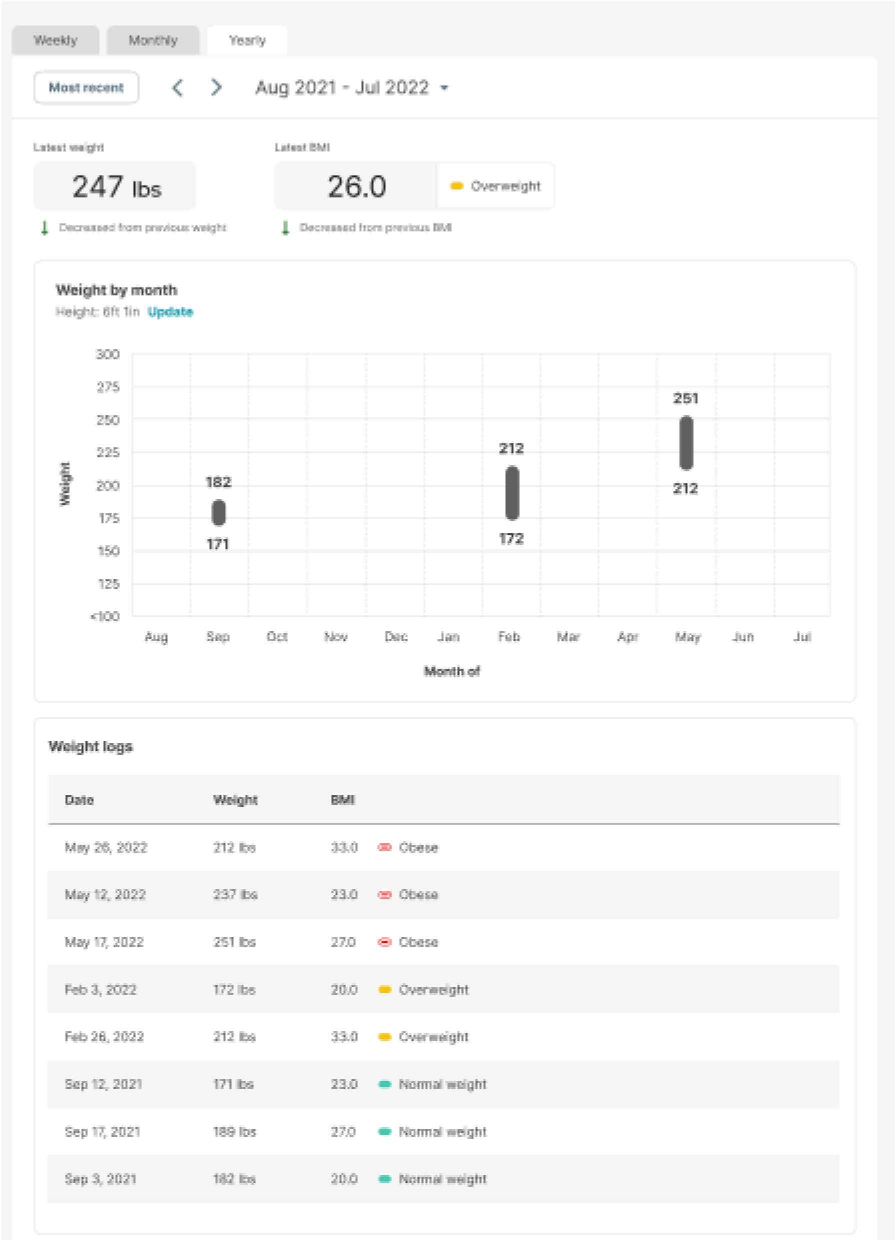


Trends overview card

Click the back button to access the Trends Overview page, where the Weight & BMI trends header is displayed. “Weekly”, “Monthly”, and “Yearly” tabs contain all relevant Weight & BMI data for each time horizon.

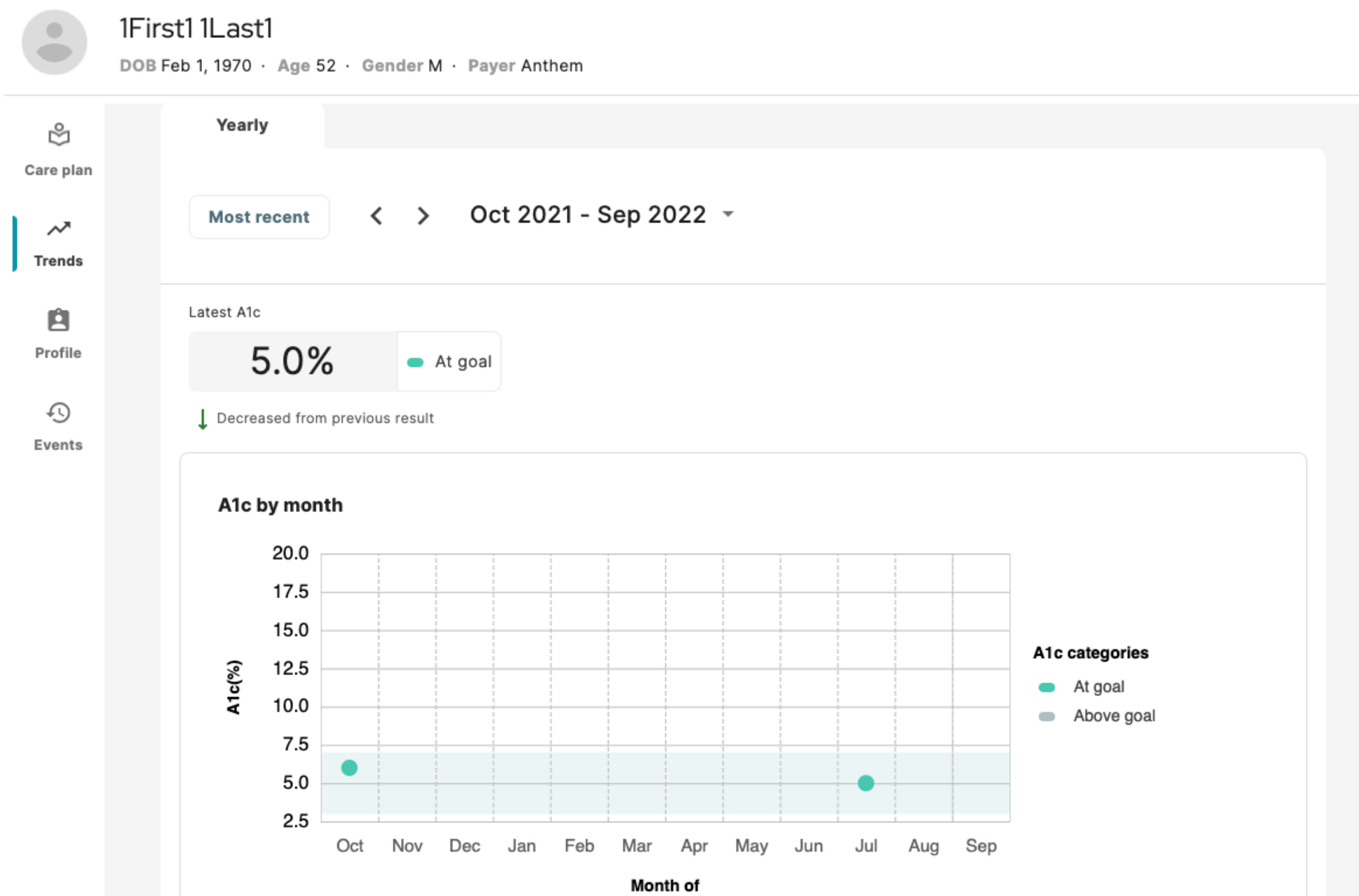
To invalidate a weight logged for a member, click the trashcan icon next to the weight in the weight log table. Click “confirm” in the pop-up to invalidate the weight, or “cancel” to keep the weight entry. The Weight trend graphs will be updated accordingly.

To update a member’s height and ensure accurate BMI calculations, go to the Monthly or Yearly chart view. An “Update height” pop-up will appear. Select the correct height, then click “Update” to save the new height or “Cancel” to close the pop-up without saving. BMI calculations will automatically update after height is updated.



Weight history details - Yearly view

21.4.5 A1C Trends



The A1C Trends page displays detailed A1C data. The Yearly tab displays details on the member's historical A1C readings. You can use the arrows to scroll to prior years, or you can select a specific year from the dropdown. The A1C data includes:

- Month-by-month A1C readings for each available year
- In target range or Out of target range
- A1C logs, including date and data source

21.4.6 Manually add an A1c reading

1. On the A1C Trends page, find the A1C value table.
2. Click the Add A1c button ( ).

3. Add the result, including test date, source of the result, and any notes that might be helpful in the future.
4. When done, click **ADD**.

The new A1c value will appear in the graph and table.

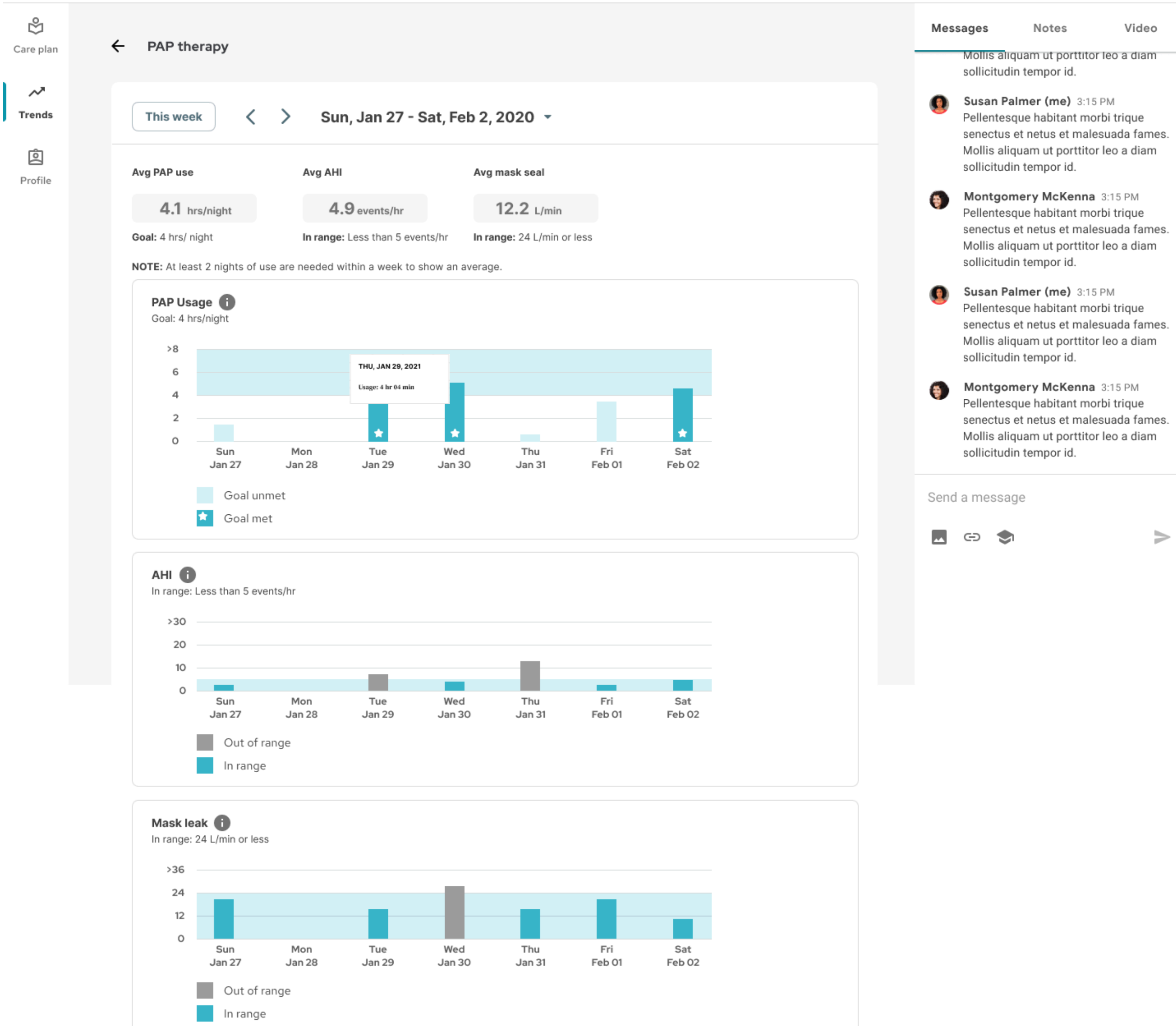
21.4.7 Remove or invalidate an A1c result

6. On the A1C Trends page, find the A1C value table.
7. Find the value in the table that you want to invalidate.
8. To the right of the value and notes, click the delete button ( ).
9. In the pop-up window, click **OK** to confirm.

The A1c value will be removed from the chart and will be grayed out in the table. You cannot edit or delete A1c readings automatically uploaded by the console system.

21.4.8 PAP Therapy Trends

If the member has enrolled in the Onduo or Primasun Obstructive Sleep Apnea program, a PAP Therapy card will appear in the Trends view showing the average PAP usage per night for the past week. Selecting the PAP Therapy card will display a patient's PAP usage, AHI, and mask leak data from the current week:



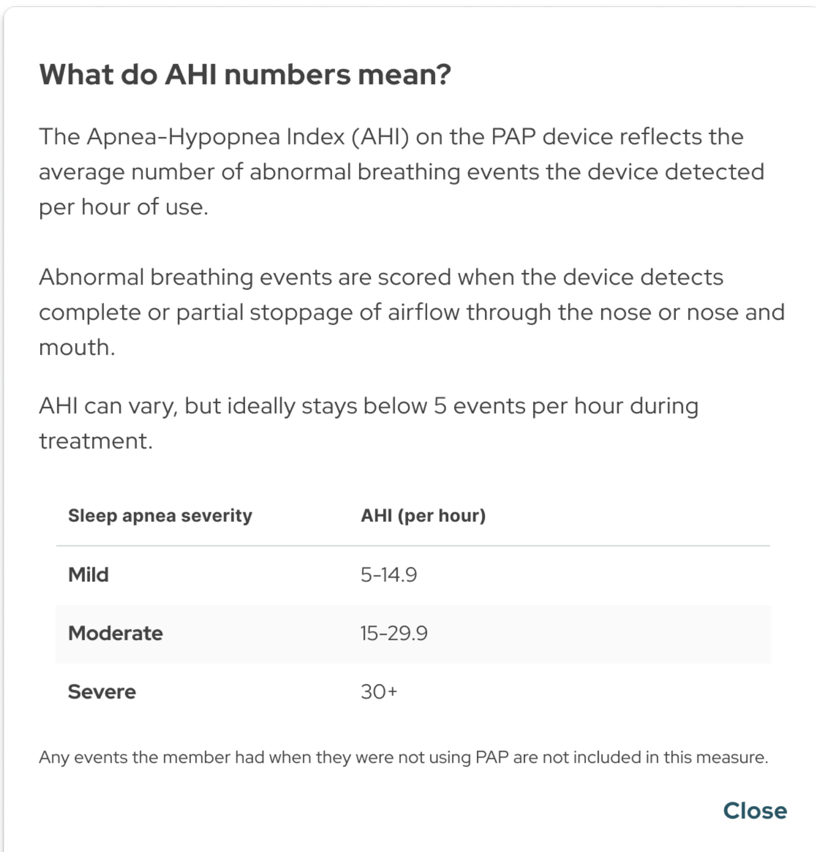
The PAP therapy Trends page displays detailed Positive Airway Pressure (PAP) usage, Apnea-Hypopnea Index (AHI), and Mask Leak data.

The week-over-week views display details of the member's historical PAP data. You can use the arrows to scroll to the previous or next week, or you can select a specific week from the dropdown. The PAP data includes:

- **Positive Airway Pressure (PAP) usage:** Displays a graph of PAP usage, including number of hours used per night. Displays whether the goal was met or unmet.

- **Apnea-Hypopnea Index (AHI):** Displays a graph of average AHI per night. Displays whether the patient was in range or out of range.
- **Mask leak:** Displays a graph of average mask leak per night. Displays whether the patient was in range per day.

Tapping the icon next to any of the PAP data categories will display detailed information about the category and what it means:



What do AHI numbers mean?

The Apnea-Hypopnea Index (AHI) on the PAP device reflects the average number of abnormal breathing events the device detected per hour of use.

Abnormal breathing events are scored when the device detects complete or partial stoppage of airflow through the nose or nose and mouth.

AHI can vary, but ideally stays below 5 events per hour during treatment.

Sleep apnea severity	AHI (per hour)
Mild	5-14.9
Moderate	15-29.9
Severe	30+

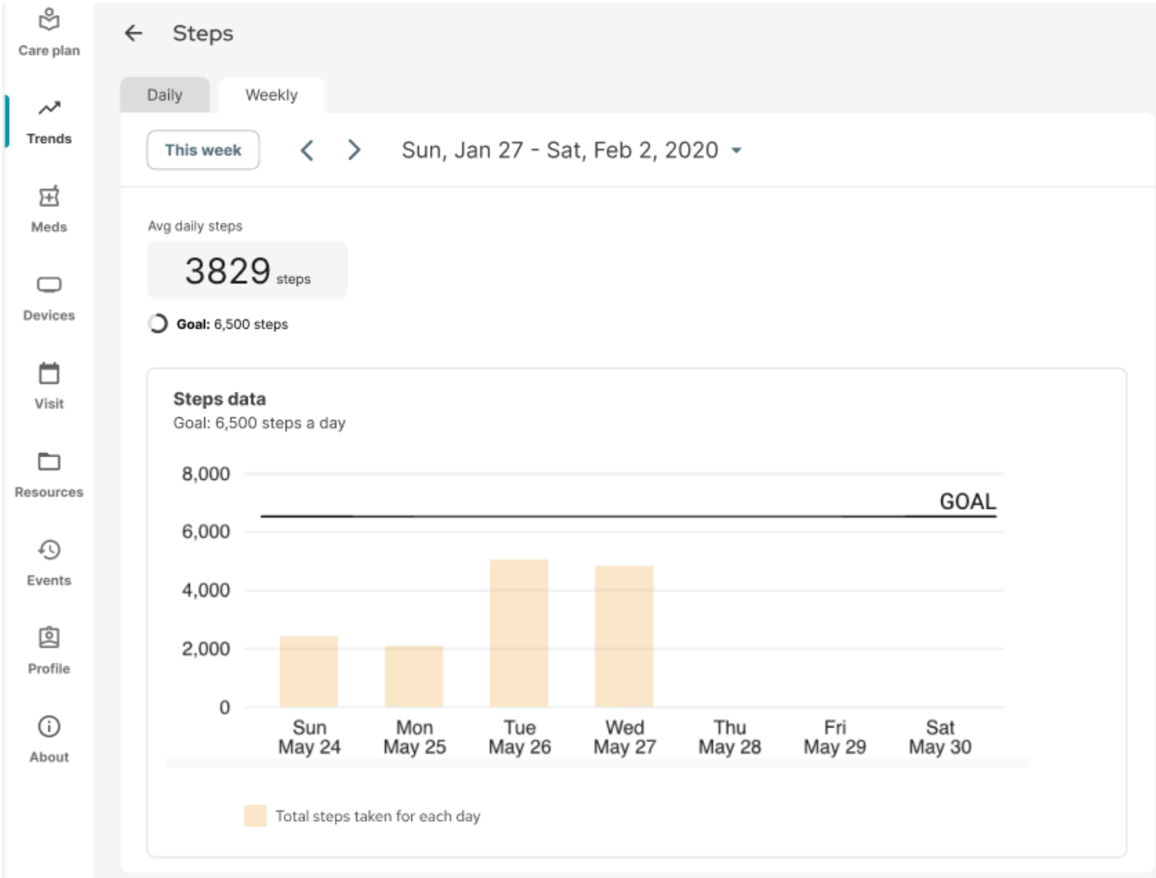
Any events the member had when they were not using PAP are not included in this measure.

Close

The Program section displays details of the member's current OSA checkpoint.

- **First Night & First Week Checkpoints**: Displays information on the member's activity and completion for the current checkpoint.

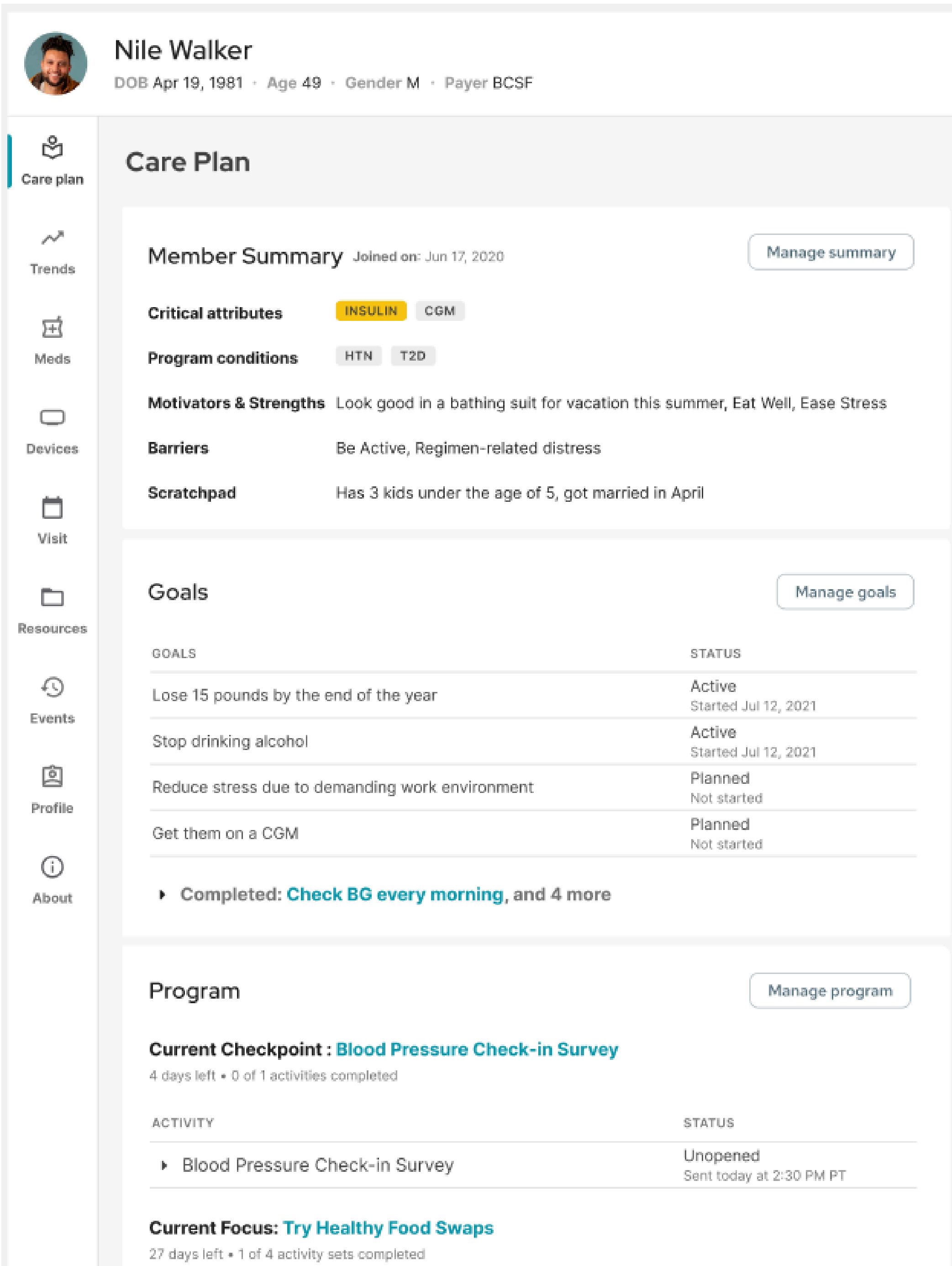
21.4.9 Steps Trends



The Steps Trends page shows detailed steps data. You can view the number of steps taken that day (in day view) or the average number of steps taken per day (in week view). Both Daily and Weekly views show the goal for the number of steps taken per day.

21.5 Care Plan

21.5.1 View Care Plan



Member Summary

At the top of the Care Plan page, the Member Summary section displays important member information to inform the care plan and your approach with your member. This includes:

- Critical attributes - Whether the member is currently using a BGM or CGM, or whether the member is currently using critical medications such as insulin.
- Programs - Of the programs that Onduo offers, which programs the member is currently enrolled in. This also includes which program is the current focus.
- Program conditions - Full list of the member's health conditions.
- Motivators and strengths - Member's self-reported sources of support, motivation, and drive.
- Barriers - Challenges the member is experiencing with respect to their health goals.
- Care team plan - Important notes about how the care team is approaching the care plan for the member.
- Scratchpad - Other important, miscellaneous notes about the member.

Goals

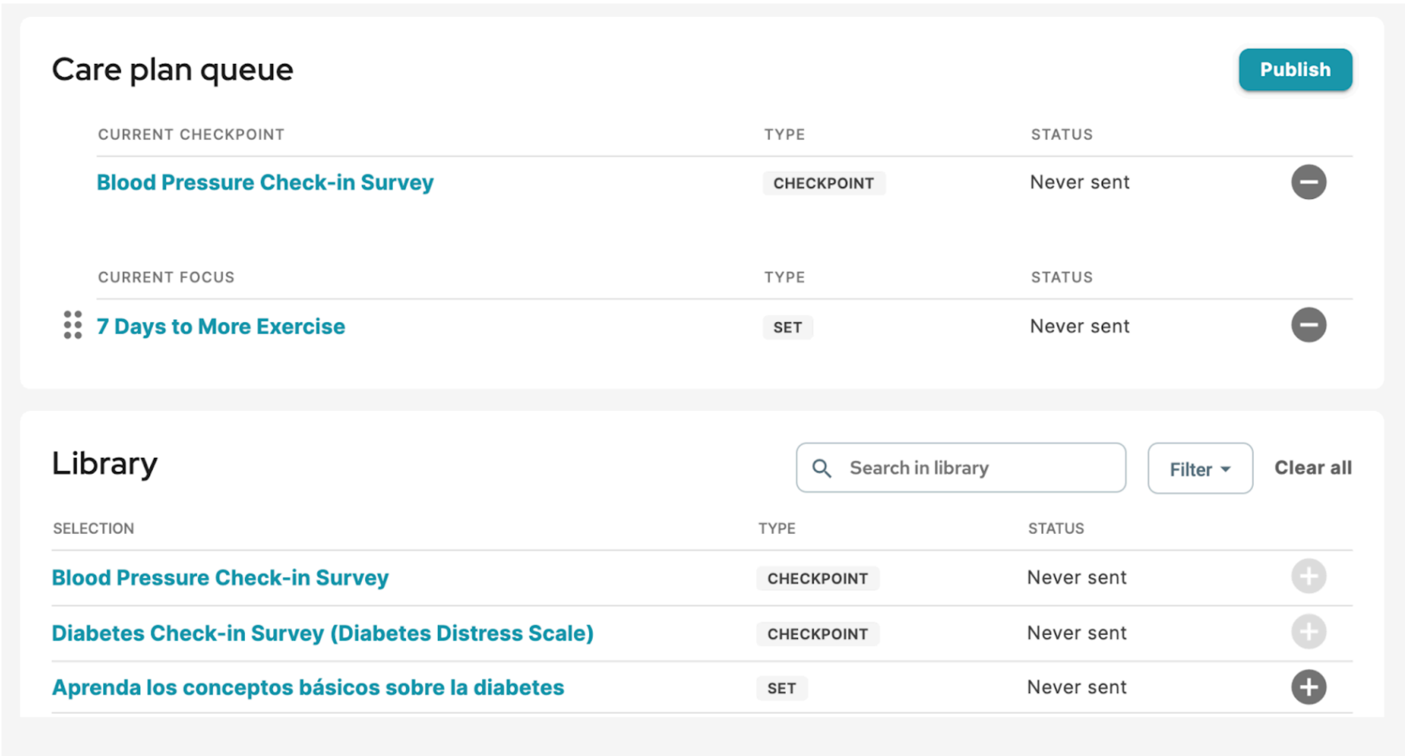
The Care Plan page includes a list of the member's Goals, including the name, date started, and status (e.g. active, planned).

Care team will have the ability to view the details of a care plan component that are deployed for a member, such as:

- Number of activities in the set, checkpoint, or journey
- Duration of the activity
- Titles of activities within the set, checkpoint, or journey
- Activity Assignee
- Activity Status
- Activity quiz responses
- Activity logged event
- Upcoming care plan component

Upon expiry or completion of an activity set or checkpoint (but not journey), the care team will be prompted to review the content with the member. If the activity set or checkpoint is not completed, the care team will be presented with an option to either resend it, send the next care plan component in the queue, or manage the member’s care plan.

21.5.2 Manage Care Plan



The care plan view can be accessed in the Care Plan tab. The care plan has three components: member summary, goals, and program. Each of these components can be managed by clicking the associated “Manage” button.

The purpose of this page is to provide context for a care team member to deploy the next care plan component to a member, such as

- Available activity sets, and checkpoints
- Upcoming activity sets, and checkpoints
  - Locked: Member needs to complete component activities in chronological order
  - Unlocked: Member can complete component activities in any order
- Care plan component status
  - Never Sent: has never been sent to member
  - Opted Out: was sent but the member opted out

- Not attempted: was previously sent but no activities within the care plan component were completed
- Partially completed: was previously sent and at least one activity but not all activities within the care plan component were completed
- Completed: was previously sent and all activities within the care plan component were complete

To add a care plan component:

Note: Only one activity set or journey can be deployed at a time to a member, and only one checkpoint can be deployed at a time to a member. The current activity set is displayed in the “Current focus” section. The current checkpoint is displayed in the “Current Checkpoint” section. The content can be sorted and filtered by clicking on the “Filter” button on the right hand side. Note that content which does not apply to the member will be filtered out and won't appear.

1) Click + button to the associated care plan component that needs to be added in the library section
2) Click Save Plan
3) Confirm sending the component

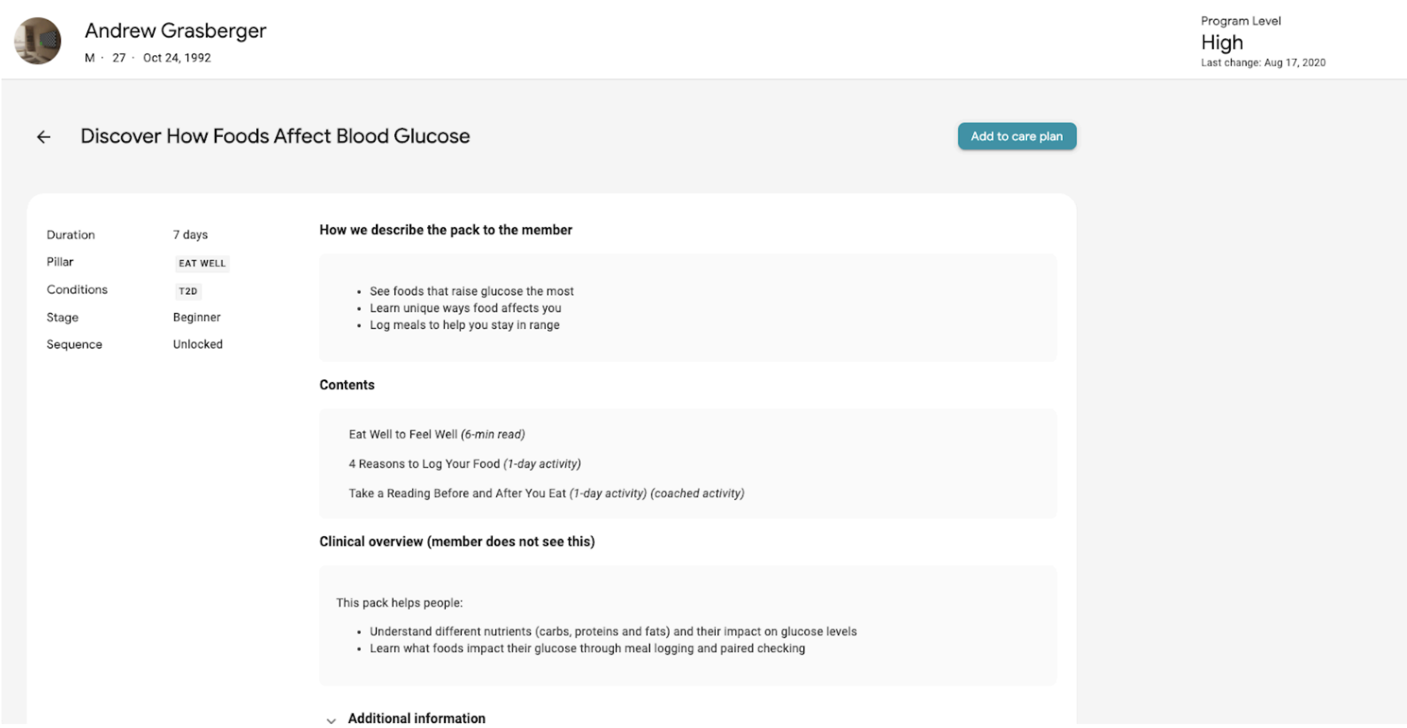
To queue a care plan component:

1) Add a component to “Current Focus” or “Current Checkpoint” section
2) Click + button for any component from the library that should be added to the queue These components should be displayed in the “Up Next” section
    a) Click - button as needed to remove any components that were accidentally added to the queue
3) Click Save Plan
4) Confirm sending a component

System-initiated care plan components:

Some care plan components - e.g. activity sets in a journey, condition specific checkpoints (PHQ-9 survey) - are systematically initiated based on business rules instead of being manually initiated by the care team. These system-initiated care plan components are displayed in the care plan queue in the same way as standard, manually initiated care plan components.

21.5.3 View Care Plan Component Details



The view care plan component details page can be reached by either:

- Clicking the component title in the view care plan tab
- Clicking the component title in the library section in the managed care plan section.

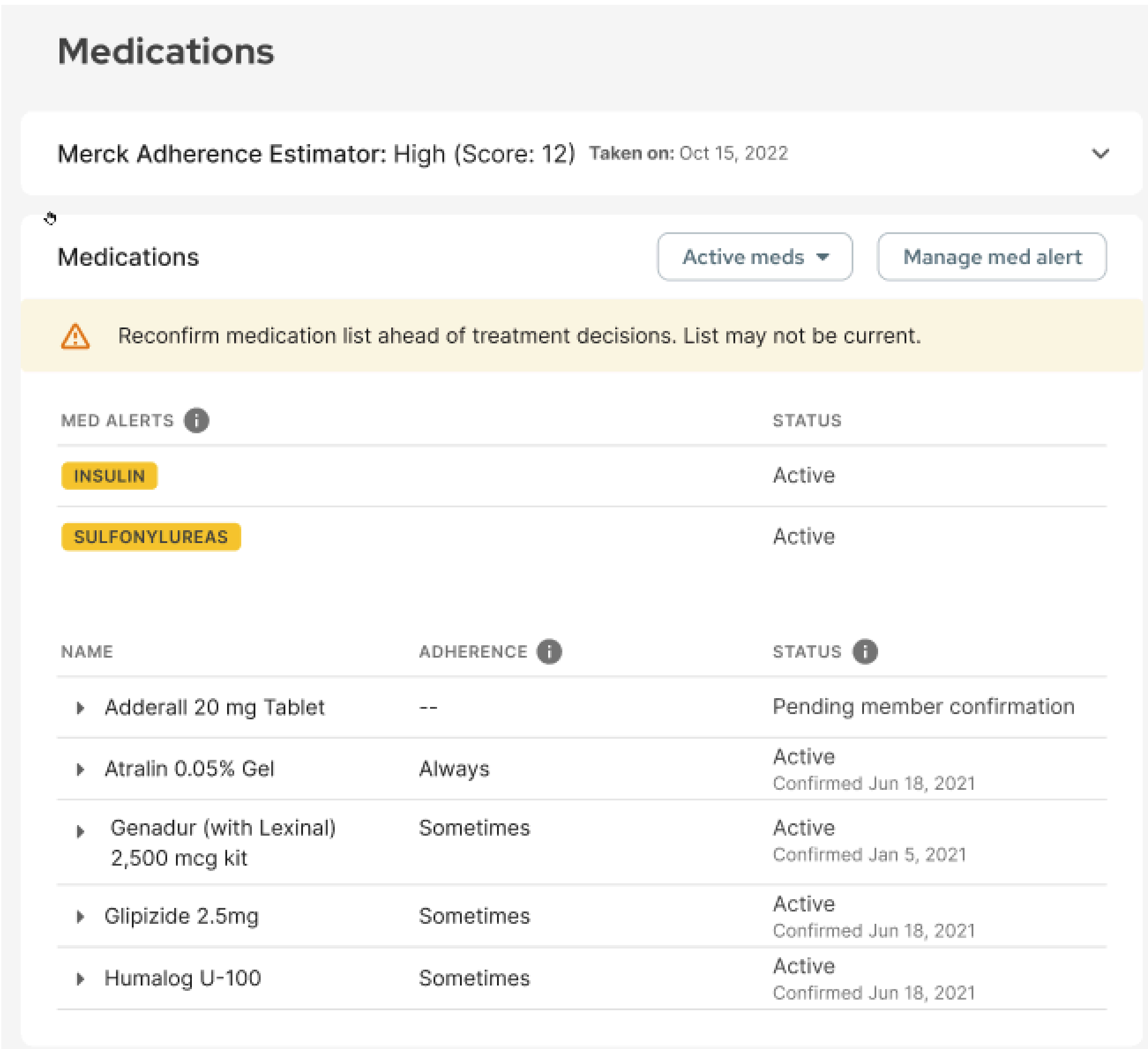
The view component details section displays:

- Duration
- Pillar
- Condition
- Stage
- Sequence
- Member facing component description
- Component activities
- Component clinical overview
- Additional information

Note that content is filtered according to member conditions and contraindications. You will only see available content that applies to the member. Note that content which does not apply to the member will be filtered out and won't appear.

21.6 Meds

Clicking the “Meds” tab shows information about the member’s medications organized into three sections; Merck Adherence Estimator, Med Alerts, and Medications.



21.6.1 Merck Adherence Estimator

This shows the member's adherence score to the Merck Adherence survey and the date the survey was submitted.

- Click the dropdown arrow to open the expanded view. The expanded view also shows the member's responses to each question in the Merck survey.

If the member has never taken the Merck survey, the system shows an "X".

21.6.2 Med Alerts

You can turn on med alerts for critical medications a member is taking so you can take appropriate actions and provide education to the member. If a member has med alerts enabled, you will see the active med alerts in alphabetical order.

1. Click "Manage med alerts" to enable/disable med alerts. A list of active and inactive med alerts displays.
2. Drag the slider left/right to activate/deactivate med alerts.
3. In the top right, click "Save".

View medication and med alerts by status

The system displays all active medications as the default view. You can filter the medication list by status.

- In the top right, click the "Active meds" dropdown button and select a filter; All meds, Active meds, and Inactive meds.

21.6.3 Medications List

The Medications section shows a list of medications for the member, their adherence to the medication, and the medication status. The system shows tooltips for Adherence and Status so the care team member knows what each Status and Adherence indicates.

- **Status**: Medications show with one of the following statuses:
    - **Active medications**: These are the medications that the member has confirmed and is currently taking. You can also see the confirmation date.
    - **Inactive medications**: These are the medications that the member has stopped taking. You can also see the confirmation date.

    - **Medications pending member confirmation**: These are the medications that have been added by an external system but not yet confirmed by the member. You can also see the date they were added in the system.
- **Adherence:** This is the member's response to "How regularly do you take this medication?":
    - **Never**
    - **Sometimes**
    - **Always**

At the top, you see a warning message that says, "Medication list may be incomplete or contain duplicate info; reconfirm list ahead of treatment decisions"

View medication details

You can view additional details for each medication on the list.

1. Click the expand arrow next to the medication name to view the following details:
    a. Directions
    b. Days
    c. Times
    d. Dosage
    e. Last fill date
    f. NDC
    g. Reminders
2. Click the arrow again to close the expanded view.

21.7 Profile

Clicking on the member name in the Banner brings up more data about the member, including their account information regarding Onduo, their contact information, their primary care physician, diabetes supplies, and devices.

To view the member's full account information history, click **History** from the left nav bar. See section 21.12 History for more details.

21.7.1 View account info

- **Enrollment**
  - **Onduo ID.** This is the member's unique program identifying code.
  - **Salesforce ID.** This is the member's unique ID in Salesforce.
  - **Enrollment method.** This is the method of enrollment.
  - **Authentication method.** This is the method the member used to sign in at enrollment.
  - **User since.** This is when the member started using Onduo.
  - **Last update.** This shows the last time the member's record was edited.
  - **Last viewed messages.** This shows the date and time the member last viewed the Messages tab of their app.
  - **Last heard from.** This shows the last time when a member reached out to a care team
  - **Last contacted.** This shows the last time when a care team reached out to the member
- **Insurance**
  - **Payer.** This is the organization paying for this member's participation.
  - **Insurance plan.** This is the member's insurance plan.
  - **Insurance group ID.** This is the member's insurance group ID.
  - **Athena ID.** This is the member's ID associated with their Electronic Health Record. There is also an "Open in Athena" link next to the ID, which will open the member's chart in the Athena EHR.
- **Device**
  - **Phone type.** This is the mobile operating system the member is using to access Onduo (for example, Android).
  - **Phone model.** This is the specific type of phone the member is using (for example, Pixel).
  - **Phone OS version.** This is the specific type of phone OS the member is using
  - **Onduo and Primasun app version**. This is the version of the Onduo or Primasun App the user has installed on their phone.

21.7.2 View member info

- **Full patient name.** This is the member's full name.
- **Email address.** This is the member's contact email address.
- **Phone number.** This is the member's phone number.
- **Shipping address.** This is the member's address that shipments are sent to.

21.7.3 Edit member info

Care Lead Managers are able to edit the following about a member:

- Account status to disable or enable the member
- External Healthcare Professionals
- Health condition programs
- Member contact info
- Emergency contact info
- Notification Settings

21.7.4 Edit Internal Care Team

Coach managers can join a member's care team by taking the point of contact. Select **Join Care Team**, then select **Take Point of Contact**. Your name will now be labeled as POC. When you no longer wish to be the POC, select **Return Point of Contact**, and select the new POC.

As a coach manager, you can also reassign the care lead for the member. Select **Reassign Care Lead**. In the pop-up, select the new care lead, start date, and when the reassignment ends, then **Save.** The currently assigned care lead will see an Assigned CL button.

Existing care team members can choose to leave a member's care team. Under Internal Care Team, click **Leave Care Team**.

21.8 Devices

Devices and supplies can be viewed and managed in the Devices tab. A list of devices is displayed, along with name, ID, and status. From this tab, you can create shipments, create devices, and modify devices.

21.8.1 View devices

- **Device type.** This is the device type associated with a member's account. (for example, Dexcom G6)
- **Device id.** This is the device id associated with a member's account. Note: member-provided devices will not have associated ids.
- **Device status.** This is the device status associated with a member's account. Two types of statuses are shown: the pairing status and the enabled/disabled status. Clicking on the filter menu allows you to see all devices, only enabled devices, or only disabled devices.

21.8.2 View shipments

A list of shipments appears below the list of devices. The name of each shipment is displayed, along with tracking number (if available), the creator of the shipment, and shipment status.

- **Pending shipments.** These are shipments that have been scheduled for the members.
- **Completed shipments.** These are shipments that have been completed for the members.
- **Create a new shipment.** To create a new shipment, click the "create new shipment" button. A pop-up order form will prompt you to choose a shipment method and the supplies and/or devices you wish to order. Once the order has been placed, a confirmation message will display, and the shipment list will be updated with the new shipment and tracking number.

21.9 Tasks and Workflows

Tasks are a vital way to keep track of your members and their needs and activities. Tasks can be systematically generated based on member events (e.g. review an out-of-range blood pressure reading, check in with member weekly) or manually created by the care team (e.g. escalate

member to clinician). Each task is assigned to a specific person on the care team, so that it's clear who is responsible for addressing it. In the Tasks section, you can view pending and completed tasks, create new tasks, and reschedule, reassign, and resolve pending tasks.
To view tasks and workflows history, click on History from the left nav bar. See section 21.12 History for more details.

21.9.1 View pending tasks

Pending tasks are tasks that are open and have not yet been resolved. To view pending tasks:

- Open the Member Detail page.
- Click the "Tasks" tab in the right-hand panel.
- All pending tasks are displayed in reverse chronological order. Tasks are grouped into "Current tasks," "Future tasks," and "Assigned to others."
    - "Current tasks" are tasks that currently pending and assigned to you
    - "Future tasks" are tasks that are scheduled for a future date and assigned to you
    - "Assigned to others" are tasks that are assigned to other care team members
- Click on the task to see details, including Assignee, Priority, Created on, Scheduled for, and Note.

21.9.2 View completed tasks

Completed tasks are tasks that the care team has already addressed and resolved. To view previously completed tasks:

- Open the Member Detail page.
- Click the "Tasks" tab in the right-hand panel.
- Scroll to the bottom of the Tasks screen and click on the "View completed tasks" link. All completed tasks are displayed in reverse chronological order.
- Click on "Load more completed tasks" to see the full list.

21.9.3 Create a new task

The care team can manually create many tasks. To create a new task:

- Open the Member Detail page.
- Click the “Tasks” tab in the right-hand panel.
- Scroll to the bottom of the Tasks screen and click on the “Add” button.
- The “Add New Task” screen will prompt you to enter details, including task type, assign to, title, description, priority, and schedule.
- Choose the care team member to whom you want to assign the task. Care team members who are out of office will have an out of office indicator next to their names. You may also enter a note.
- Click the “Submit” button to add the task.
- The new task will appear at the top of the “Current tasks” section.

21.9.4 Reassign a pending task

If a care team member wants a different person to review and address a task, they can reassign the task to that person. To reassign a pending task:

- Open the Member Detail page.
- Click the “Tasks” tab in the right-hand panel.
- Click the checkbox next to the task you want to reassign.
- Click on the Reassign (arrow) icon at the top of the Tasks screen.
- The “Reassign selected tasks” panel will appear. Choose the care team member to whom you want to reassign the task. Care team members who are out of office will have an out of office indicator next to their names. You may also enter a note.
- Click “Save” to complete reassignment of the task. The task will now appear in the “Assigned to others” section of the task list.
- You may also reassign a task from the task details panel by clicking on the task you want to reassign. The task details panel will open. Click on the Reassign (arrow) icon at the top of the Tasks screen and follow the steps above to reassign the task.

21.9.5 Reschedule a pending task

Tasks can be created for a future date. For example, if a care lead is coaching a member and wants to check in with that member next week, they can schedule that task for a specific date. The care team can also reschedule a pending task for a different date. To reschedule a pending task:

- Open the Member Detail page.
- Click the “Tasks” tab in the right-hand panel.
- Click the checkbox next to the task you want to reschedule.
- Click on the Reschedule (calendar) icon at the top of the Tasks screen.
- The “Reschedule selected tasks” panel will appear. You’ll be prompted to select “Now,” or “Choose a date and time.”
- If you select “Choose a date and time,” enter the date and time you would like to reschedule the task for.
- Click “Save” to complete rescheduling the task.
- You may also reschedule a task from the task details panel by clicking on the task you want to reschedule. The task details panel will open. Click on the Reschedule (calendar) icon at the top of the Tasks screen and follow the steps above to reschedule the task.

21.9.6 Resolve a pending task

Once a care team member addresses a given task, they can resolve it and move it to the Completed Tasks section. To resolve a pending task:

- Open the Member Detail page.
- Click the “Tasks” tab in the right-hand panel.
- Click the checkbox next to the task you want to resolve.
- Click on the Resolve (checkmark) icon at the top of the Tasks screen to resolve the task. The task will now appear in the Completed tasks section.

- You may also resolve a task from the task details panel by clicking on the task you want to resolve. The task details panel will open. Click on the Resolve (checkmark) icon at the top of the Tasks screen to resolve the task.
- Some tasks have follow-up questions that you will need to answer after resolving the task. You will see these follow-up questions after you click on the Resolve (checkmark) icon .

21.9.7 Workflows

Workflows are built into the console that include several tasks that are part of a workflow. Each step in the workflow will appear under the Tasks section in the console, showing only one task at a time. Resolving one task in the workflow triggers the next task in the workflow.
Click on a workflow to view the workflow description, created date, and progress. A workflow can be resolved (if manual resolution), rescheduled, reassigned, or canceled..

21.10 Notes

In the Notes section, you can view, create, edit, and pin a note related to a member's care. You can also notify other members of the member's care team about a note. Notes are a valuable way to document important events or information about a member, as well as a way to communicate with other care team members.

21.10.1 View notes

- Open the Member Detail page.
- Click the "Notes" tab in the right-hand panel.
- All notes are displayed in reverse chronological order.
- Click the Show More link to see the full text of a given note.

To view a summary history of notes with the member, click on **History** from the left nav bar. See section 21.12 History for more details.

21.10.2 Add a new note

- Open the Member Detail page.

- Click the “Notes” tab in the right-hand panel.
- At the bottom of the Notes section, click the Add button.
- Select a label for the note and write the note content.
- When done, click Submit.
- The saved note will be displayed at the top of the Notes section.

21.10.3 Edit a note

- Open the Member Detail page.
- Click the “Notes” tab in the right-hand panel.
- Find the note you would like to edit.
- Click the triple-dot menu button and select Edit. You can only edit notes that you added.
- When done, click Submit. Clicking Cancel will discard the edits that you are making and keep the original note.
- The saved note will be displayed at the top of the Notes section with the time that it was edited.

21.10.4 Pin a Note

Care team members can pin notes to the top of the Notes section for easy future reference.

- Open the Member Detail page.
- Click the “Notes” tab in the right-hand panel.
- FInd the note you would like to edit.
- Click the triple-dot menu button and select Pin.
- The pinned note will be displayed at the top of the Notes section, above the most recently created non-pinned notes. If there are multiple pinned notes, those pinned notes are displayed in reverse chronological order.

21.10.5 Notify other care team members about a note

Care Leads can tag one or more care team members in a note. Only coaches and coach managers can be tagged.

- In the body of the note, click the ‘@’ button and type the first few letters of the care team member’s name. You will see search results with first or last name matches.
- Choose a care team member from the search results.
- You will see the tagged care team member’s name in the note.
- If you wish to tag multiple care team members, repeat these steps.
- In order to delete a tagged member, simply delete the member’s tagged name.
- If you save a note with a tagged care team member, the console will generate a task assigned to the tagged care team members to review the note.
    - If the note label is “Review/Consult: MD,” “Review/Consult: Care Specialist”, or “Review/Consult: Pharmacist,” the console will generate the Review clinical note task.
    - If the note label is any other label, the console will generate the “Review note” task.

21.11 Goals

In the Goals section, you can create individual goals for a member, view and edit goals, track the goal status, and view a history of completed goals. You can use goals to identify specific behaviors and areas of focus that your members want to work on in order to live healthier with chronic conditions. Setting goals can also help build your members’ motivation to make healthy changes.

21.11.1 View goals

Keep tabs on your member’s list of current and planned goals.

- Open the Member Detail page.
- Scroll down to the “Goals” section.
- Select and click on the goal you would like to view.

To view the member’s goal history, click on **History** from the left nav bar. See section 21.12 History for more details.

21.11.2 Create goals

Create new active and planned goals for your member, and assign start dates.

- Open the Member Detail page.
- Click the “Manage goals” button in the right-hand panel.
- Click on “Add new goal” at the bottom of the goal list.
- Type the goal description.
- Select whether the goal is Active (currently working on) or Planned (for the future).
- If the goal is set as Planned, you may enter an optional start date.
- Click “Save” to complete the goal entry. To delete the goal entry, click “Cancel,” then “Discard.”

21.11.3 Edit goals

Update your member’s goals, including goal description, status, and start date. You can also reorder and delete goals.

- Open the Member Detail page.
- Click the “Manage goals” button in the right-hand panel.
- Select the goal you would like to edit. You can edit the goal description, change goal status, and edit or remove the goal start date.
- To reorder the list of goals, click on the dots to the left of the goal. Drag and drop the goal in the desired order.
- To delete a goal, click on the trash can icon to the right of the goal.
- Click “Save” to save changes. Click “Cancel” to discard changes.

21.11.4 Edit goal status

Update goals to reflect their current status, and mark goals as completed or canceled.

- Open the Member Detail page.
- Click the “Manage goals” button in the right-hand panel.
- Select the goal you would like to edit.
- Click the “Status” drop-down to change the status to:

    - Active: member is currently working on the goal
    - Planned: member plans to work on the goal in the future
    - Completed: member has completed the goal
    - Canceled: member canceled the goal before completing it
- Changing the status to Completed or Canceled will move the goal to the "Goals History" list.

21.12 Messages

Messages are the most meaningful and important way to support your members. Messages allow you to reach out directly to members to check in and send tasks, information, reminders, encouragement, and more. You can also review past communications between a member and other care team members. Please note that member messaging and notes are not intended to be used as the official medical record for diagnosis and treatment, and that communications for diagnosis and treatment must be communicated in the electronic medical record.

21.12.1 View messages

You can view all past messages between a member and care team, and search for specific terms.

- Open the Member Detail page.
- Scroll to the Messages section on the right-hand side of the page. You'll see messages displayed in chronological order, in the member's local time.

21.12.2 Send messages

You can send messages to members containing text, images, or hyperlinks.

- Open the Member Detail page.
- Scroll to the Messages panel on the right-hand side of the page.
- To send a text-only message:
    - Scroll to the bottom of the Messages panel and select "Send a message."
    - Type your message in the text field, then press the Send button.
- To send an image in a message:

    - Scroll to the bottom of the Messages panel and click the image button to add an image to a new message.
    - Select an image to attach. You can choose a png, jpg, or jpeg file from your local file directory.
    - Enter the message you wish to send in the text field. You may also send an image-only message.
    - Click the Send button to send, or Cancel to cancel.
- To send a hyperlink in a message:
    - Scroll to the bottom of the Messages panel and click the hyperlink button.
    - Enter the message you wish to send in the text field. Enter the display text, and a well-formed URL. A well-formed URL is any URL meeting the WHATWG URL Standard,
    - Click the Send button to send, or Cancel to cancel.

21.12.3 Message a member about an event in their daily details

Most log events in a member's history can be sent to the member with a message. To send a timeline event as a message:

7. Open the Events page from the left nav bar.
8. In the fourth column at the top, click the “Attach to a message” button. A message panel will appear.
9. In the window that appears, select **Send a message** and type a message.
10. Click **Send**.

The event will appear in the messages section of the console with your message appended. This will also appear as a message in the member app.

21.13 History

The History section from the left nav bar contains a summary of important member and administrative activity organized into tabs. The history tabs include: Events history, Admin history, Notes history, Workflow history, and Goals history.

21.13.1 Events History

The data on Events History tab can help you understand historical context and possible cause-and-effect relationships among different event types.

Open the Events History page by clicking the History tab in the left nav bar. You'll see a table of events displayed in reverse chronological order by default, labeled by event type. You can filter a member's events in order to view a subset - see section 21.10.1 below for more details.

Types of events include:

Report events

A report event type is displayed as "Report" when a new report is available. Report events include:

- Onboarding survey: "Survey completed: Onboarding"
- Follow-up survey: "Survey completed: Follow-up"
- Blood pressure check-in survey: "Survey completed: Blood pressure check-in"
- In-app video visit survey: "Survey completed: In-app video visit"
- CGM eligibility survey: "Survey completed: CGM eligibility"

Care plan events

A care plan event is displayed for activity related to goals and activity sets. These event types are displayed as "Care Plan."

- Goals: Goal events include goal title and status (i.e. started, completed, canceled)
- Activity sets: Activity set events are displayed when activity sets are completed or opted out. Activity set events include activity set title, description, and status (i.e. completed, opted out).

Program events

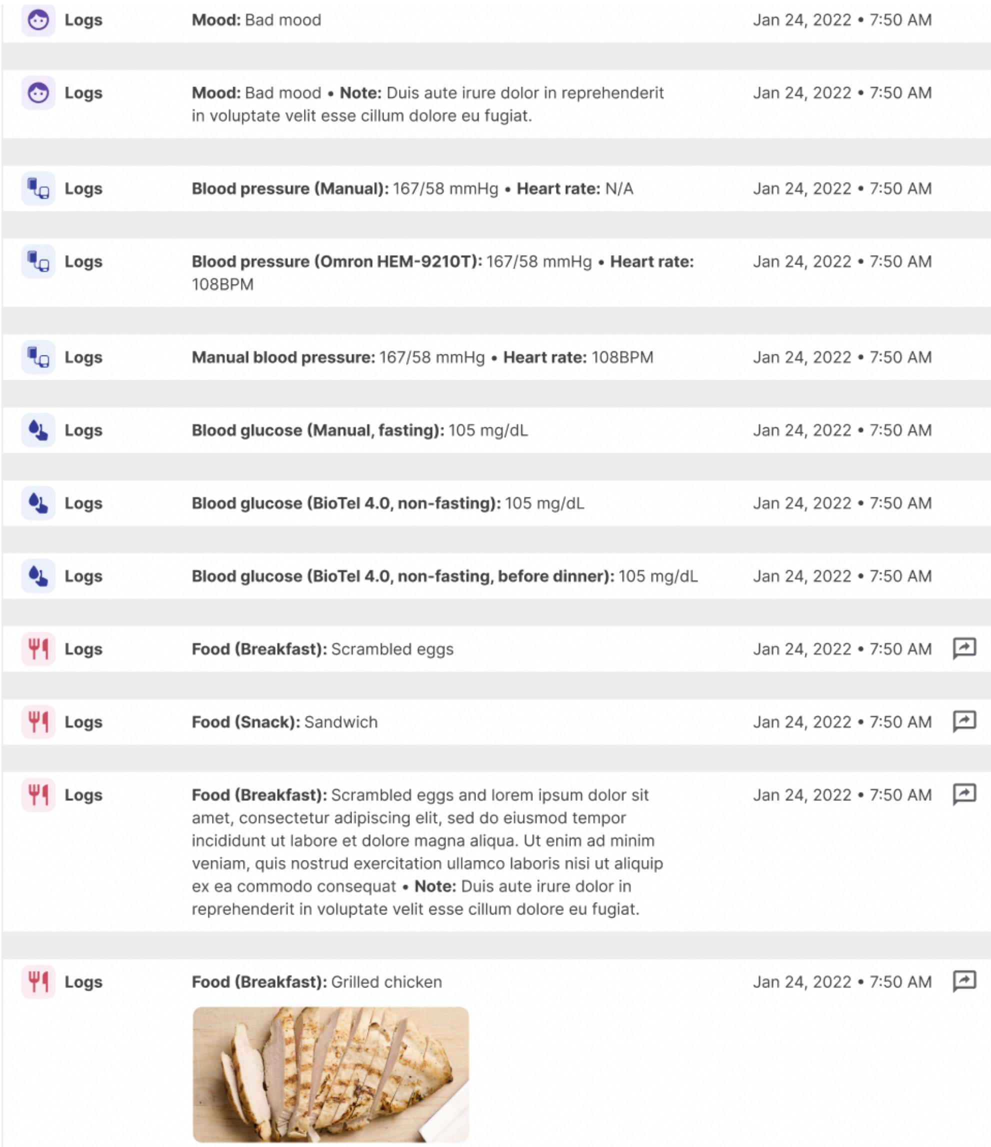
Program events allow care team members to view program-related events in the context of historical activity. Care team members can view trends and understand potential cause and effect between different event types. There are four types of program event types displayed as "Updates": Support Tier updated, Program added, Program status updated, and medication events.

- **Support Tier updated:** This event is displayed when a member's Support Tier is updated. The event description displays "Support Tier updated," the new Support Tier, and the previous Support Tier.
- **Program added:** This event is displayed when a member is enrolled in a new program. The event description displays "Program added," along with the program name.
- **Program status updated:** This event is displayed when the program status for the member's enrolled programs is updated. The event description displays "Program status updated," along with the program name, new program status, and previous program status.
- **Medication events:** Medication events allow care team members to see when a medication is added to, modified within, or removed from a member's profile. Medication events are displayed with the event type "meds." These events display the medication name, as well as the medication action (i.e. added, modified, removed). Care team members can also view the member's historical medication events.

Member-logged events

You can view the insights from a member's meal and exercise log to support and help the member understand how their food intake or exercises are related to their glucose level. You'll see all activity logged by the member in chronological order, including:

- Glucose
- Blood pressure
- Exercise
- Medications
- Meals
- Weight
- Mood



Medication updates

When a member’s medication is added or modified, it appears as a “Medication” event.

Device updates

When a member’s connected device is updated, it appears as a “Devices” event.

21.13.2 Admin history

You can see a member's full account information history in the Admin history tab to troubleshoot any administrative issues and to have an audit trail. Admin history is organized by date, author, notes, audit details, and also includes changes to support tier.

21.13.3 Notes history

You can search through a member's notes history to check for certain medical assessments. Notes history is organized by date created, date updated, author, label, and a notes column that contains that text of the note. All notes are shown on a single page by default.

21.13.4 Tasks and Workflows history

The Workflow history tab displays a member's completed workflow and task history. This data can help you better address a task or workflow for a member. By default, workflow history is sorted by scheduled datetime and future tasks are on top.

You can click on a workflow to see additional details about the task, including assignee, priority, completed date (if completed), and task history.

21.13.5 Goals history

The Goals history tab displays a member's comprehensive goal history. You can view this history to assess how their care is going and work on their goals, which is a critical part of their care. Goal details are organized by goal, status (completed, canceled, active, or planned), and appropriate dates, depending on the goal status.

21.13.6 Filtering events

You can filter a member's events to view specific subsets and focus on how those events have changed over time. Click the "Filters" button in the upper right-hand corner of the Events page. You'll see a drop-down containing the following filters:

- Logs
    - Food/drink
    - Exercise

- Weight
- Medication intake
- Mood
- Blood pressure
- Glucose
- Care Plan
    - Goals
    - Activity set
- Reports
    - Onboarding survey
    - Follow-up survey
    - Blood pressure check-in survey
    - PWN encounter summary
    - Encounter summary
    - In-app video visit survey
    - CGM eligibility survey
- Program
    - Support tier
    - Program status
    - Medication update

Select the filters that you would like to apply, then click the “Filters” button again to view the results. Click the “Load more” button at the bottom to see more events, if available.

21.14 Resources

The Resources section contains a library of education content cards that you can send to members in a message. Open the Resources page by clicking the Resources tab in the left nav bar. You can preview, search, and filter content cards so you can choose the right content to send to members. Types of content cards include videos, external articles, Onduo content, and packs of cards.

21.14.1 Search content cards

1. Open the Resources page
2. By default, content cards are sorted by “Most commonly sent.”
3. You can search for content cards by typing in the Search bar.
4. To do an advanced search, you can select categories, filters, and tags from the drop-down menus. You can clear your search by clicking Clear All.
5. You can add cards to your favorites by clicking the heart icon.

21.14.2 Preview content cards

- Open the Resources page
- To preview a content card, click Preview. In a preview, you can see how popular it is, including:
  - The number of times the content card was sent to members overall
  - The number of times the content card was sent to members in the last 30 days
  - The number of members who marked the content card as useful
  - The number of members who marked the content card as not useful.

21.14.3 Send content cards

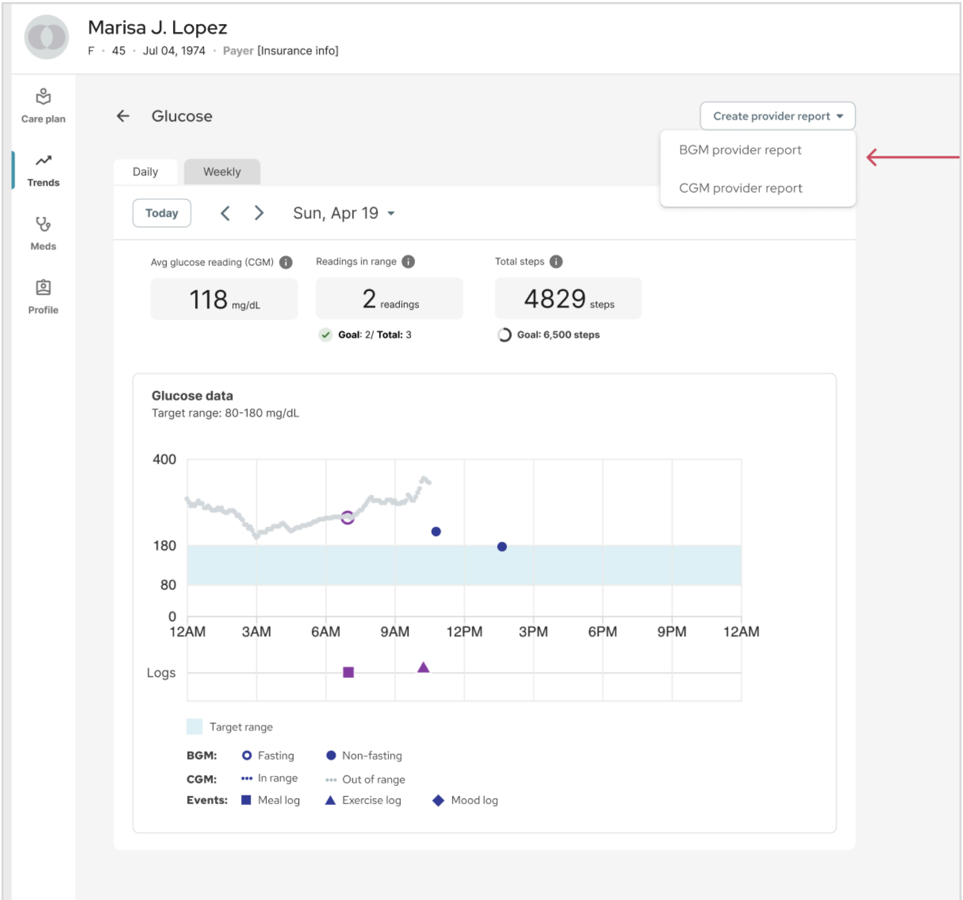
- Open the Resources page
- To send a content card, click Attach. A message panel will appear.
- Click Send to send the card, or click Cancel to cancel the message.

21.15 Reports

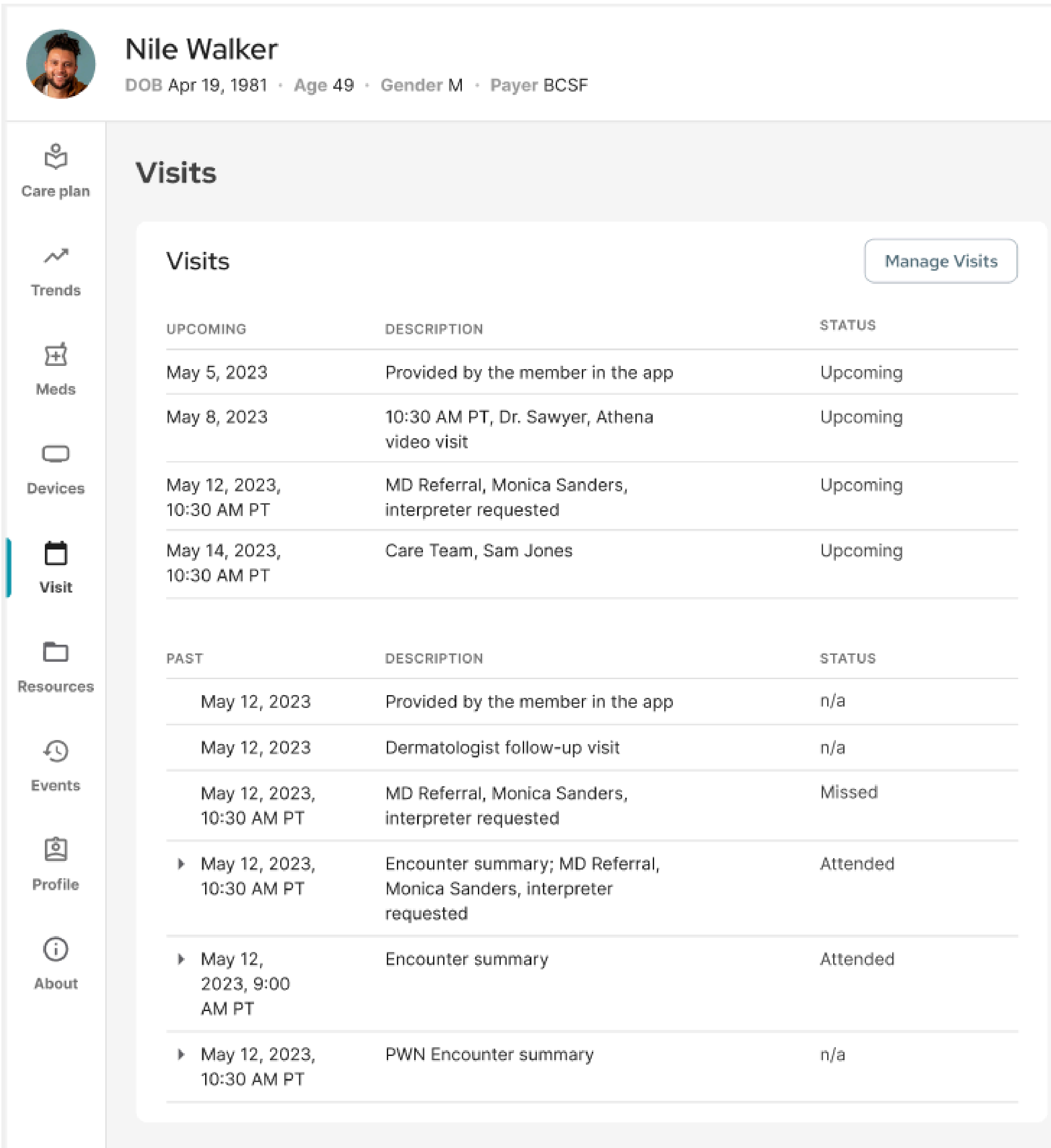
Care Leads can review select reports in the new Console within the “Trends” tab. You can select a member to view their relevant reports, such as:

- Onboarding survey
- Follow up survey
- CGM Eligibility survey
- BP Check-in survey
- OSA-related reports

- Provider reports (see image below)



21.16 Visits



You can view a member's provider visits with Onduo or external providers in the Visits tab, including upcoming and past visits, and visit reports. Each visit and visit report shows the date, description, and status.

21.16.1 Add Upcoming Visits

You can add new upcoming visits for a member.

- Open the Visits tab, and click **Manage Visits.**
- Select **Add new provider visit**, and a new visit line appears.
- Today's date will auto-populate. Fill in the Description, and **Save.**

21.16.2 Edit Upcoming Visits

You can make some changes to upcoming visits.

- **Onduo provider visits:** System generated or workflow-related visits can only be canceled or rescheduled via a workflow.
- **External provider visits:** Visits added by a member or coach can be edited by changing the date, time, or description. You can also delete external visits.

21.16.3 View Visit Reports

You can view Encounter Summary and PWN Encounter Summary visits reports in the Visits tab. Reviewing the report enables you to better support the member in understanding their encounter and if you need to escalate the member. From the Visits tab, click the report to expand and view the report details.

An **Encounter Summary** can be related to a past visit or not.

May 12, 2023, 10:30 AM PT	Encounter summary; MD Referral, Monica Sanders, interpreter requested	Attended

Name	Nile Walker (35 yo, M), ID# 63237	**Appt. Date/ Time**	01/22/2022 04:00 AM
DOB	03/01/1987	**Service Dept.**	MAIN OFFICE -- Onduo LLC
Provider	NEELI SINGH, MD		
Insurance	Med Primary: *SELF PAY*		

Chief Complaint
Asynchronous CGM (Primary), Synchronous CGM (Primary)

Vitals
None recorded

Allergies
Non recorded

Medications
None recorded

Vaccines
None recorded

Problems
Reviewed Problems

Social History
Gender Identity andLGBTQ Identity

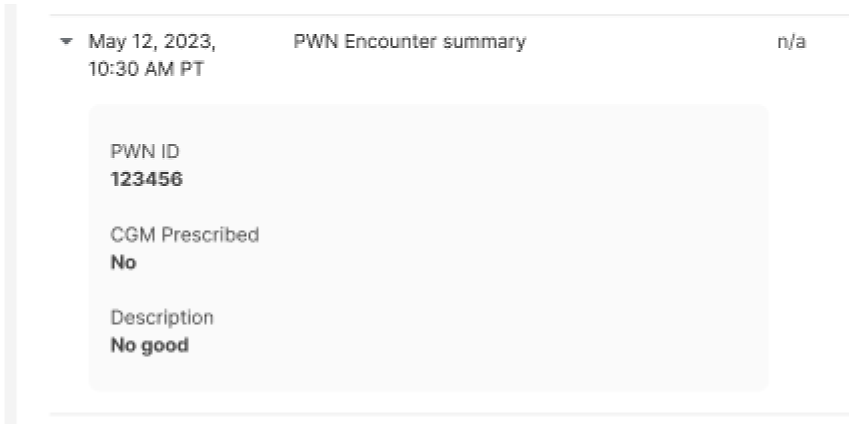
HPI
Patient is a 35 year old male with type 2 diabetes being evaluated for medical appropriateness of intermittent continuous glucose monitoring.

Duration of diabetes: 2 months
Last known A1C: 7.2% on Jan 18, 2023
Medical problems: None recorded
Diabetes medications: Sulfonylureas
Has previously used CGM: No
Self-monitoring of blood glucose: ___
Allergies to medications NKDA: ___

Exclusion criteria
Current pregnancy: No
Adhesive allergy: None recorded
Current use of anti-coagulants: None

Prior to initiating visit, patient confirmed, name, DOB, and location in ___ Patient confirmed can ___ the Provide can ___ the patient.

PWN Encounter Summary displays asynchronous CGM prescriptions for the member based on the member's results from the in-app CGM eligibility survey.



21.17 Video Visits

If you are a physician, psychiatrist, therapist (PhD., LICSW), pharmacist, Licensed Mental Health Clinician, or sleep physician, your messaging section on the member detail page will always have an additional tab labeled "Video visits." For other console user types, the tab will be shown only if you have an upcoming video visit scheduled with that member.

- Appointments scheduled for today with that member will be listed there. 10 minutes before the appointment until 5 minutes after the appointment end time, a "Start visit" button will be displayed.
- Click "Start visit" to join the visit with the member.
- If the member requested a Spanish interpreter, a modal will pop-up with a button to "Call interpreter". Clicking this button will auto-dial a Spanish interpreter.
- A red dot indicator will be visible during active video sessions.
- You need to be on the member's care team in order to join a video visit.
- During a visit session, you can experience the following features:
    - More than 1 care team member can join the video session with a member
    - External camera usage is recognized and can be used for the session
    - Navigate other sections of the member details page, create a task, notes, and/or send a message to the member while video visit is in a session
    - Rejoin the video visit before scheduled end time

22 Appendix: Care Console Coach Tasks

22.1 A1c Process Tasks

22.1.1 A1c: Baseline due

Task Description	Member is due for their baseline A1c
Task Priority	6
How Task is Generated	Triggered 25 days after the completion of on-boarding survey when no verified A1c has been recorded in Onduo.
How Task is Regenerated	Task will regenerate every 15 days if the member is engaged and no verified A1c data has been recorded.
How Task is Resolved	Manual
Recommended Steps	Remind the member to complete at home A1c kit OR send the recent results (for example: photo of recent A1c test).

22.1.2 A1c Follow-up: Discuss A1c result with member

Task Description	The A1c take-home kit has been processed. Review the new result in the A1c header graph and share it with the patient.
Task Priority	6
How Task is Generated	Valid A1C value written to DMI server from integration server
How Task is Resolved	Manual
Recommended Steps	Review the new result in the A1c graph in the console and share it with the member.

22.1.3 A1c Follow-up: Investigate invalid A1c value

Task Description	The A1c take-home kit has been processed. Review the new result in the A1c header graph and share it with the patient.
Task Priority	6
How Task is Generated	Invalid A1C value written to DMI server from integration server

How Task is Resolved	Manual
Recommended Steps	Ask the member to send a photo of recent labs OR to have their PCP office either fax or mail labs.

22.1.4 A1c: Check on collection

Task Description	Encourage member to submit A1c results via lab picture or a fax from their doctor
Task Priority	6
How Task is Generated	Manually generate this task to follow up with a member if a member does not want to complete the home A1c kit but agrees to take a photo of a recent A1c result or have their PCP fax their recent results.
How Task is Resolved	Manual
Recommended Steps	Ask the member to send a photo of recent labs OR to have their PCP office either fax or mail labs.

22.1.5 A1c: Check on HbA1c home test kit

Task Description	Ask member to complete HbA1c home test kit
Task Priority	6
How Task is Generated	Triggered 5 days after the HbA1c home test kit shipment date
How Task is Resolved	Manual
Recommended Steps	Check if member has received HbA1c home test kit and ask them to complete and send back

22.1.6 A1c: Follow-up due

Task Description	Member is due for their follow up A1c
Task Priority	6
How Task is Generated	Triggered 90 days after the previous A1c
How Task is Regenerated	Task will regenerate every 15 days if the member is engaged and no follow up A1c data has been recorded in the past 90 days.

How Task is Resolved	Manual
Recommended Steps	Send home kit or obtain a care team verified result from the member.

22.2 CGM Tasks

22.2.1 CGM Wear: Check on data

Task Description	No CGM data observed for 24 hours. If appropriate, check in with member.
Task Priority	6
How Task is Generated	Member is in CGM mode, no CGM readings for more than 24 hours.
How Task is Resolved	Manual
Recommended Steps	Check in with the member. No CGM data can be due to the member not having the Onduo app open. Once the member opens the app again, the data will flow back through.

22.2.2 CGM Wear: Remove sensor

Task Description	Remind member to remove CGM sensor, and send “Time To Remove Your Sensor” video.
Task Priority	6
How Task is Generated	This task can be manually generated.
How Task is Resolved	Manual
Recommended Steps	Remind member to remove CGM sensor

22.3 CGM Screening Workflow

22.3.1 CGM Screening Workflow: CGM screening: check plan (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **CGM Screening Workflow: CGM screening: check plan (auto)**
2. CGM Screening Workflow: CGM screening: check phone type (auto)
3. CGM Screening Workflow: CGM screening: check state of residence (auto)
4. CGM Screening Workflow: CGM screening: message member to update the app (auto/manual)
5. CGM Screening Workflow: CGM screening: confirm app version (auto)

6. CGM Screening Workflow: CGM screening: confirm medications
7. CGM Screening Workflow: CGM screening: user willingness (auto)
8. CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)
9. CGM Screening Workflow: CGM screening: review survey (auto)

1) CGM Screening Workflow: CGM screening: check plan (auto)

Task Priority	7
How Task is Generated	Part of CGM Screening Workflow: This task will automatically trigger for eligible high-risk T2D patients via the TaskGenerator. Patients are eligible if their care org configuration is set to automatically start the CGM Screening workflow, their eligibility ID is not blacklisted, and their phone is whitelisted.
How Task is Regenerated	Regenerated for patients every 90 days who remain high-risk and have <= 2 reoffers for CGM screening.
How Task is Resolved	Automatic: The system will check the member's plan and resolve this task automatically if eligible to continue.

22.3.2 CGM Screening Workflow: CGM screening: check phone type (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM Screening Workflow: CGM screening: check plan (auto)
2. **CGM Screening Workflow: CGM screening: check phone type (auto)**
3. CGM Screening Workflow: CGM screening: check state of residence (auto)
4. CGM Screening Workflow: CGM screening: message member to update the app (auto/ manual)
5. CGM Screening Workflow: CGM screening: confirm app version (auto)
6. CGM Screening Workflow: CGM screening: confirm medications
7. CGM Screening Workflow: CGM screening: user willingness (auto)
8. CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)
9. CGM Screening Workflow: CGM screening: review survey (auto)

2) CGM Screening Workflow: CGM screening: check phone type (auto)

Task Priority	7
How Task is Generated	Part of CGM Screening Workflow

How Task is Resolved	Automatic; The system will check the member's phone type and resolve this task automatically if the phone type is compatible according to our system.
Recommended Steps	If this task does not auto-resolve: Double check the member's phone compatibility via the Dexcom website or have the member try to download the Dexcom G6 app. If you determine the phone is not compatible, offer the member receiver use. If you determine the phone is compatible, you can manually resolve this task.

22.3.3 CGM Screening Workflow: CGM screening: check state of residence (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM Screening Workflow: CGM screening: check plan (auto)
2. CGM Screening Workflow: CGM screening: check phone type (auto)
3. **CGM Screening Workflow: CGM screening: check state of residence (auto)**
4. CGM Screening Workflow: CGM screening: message member to update the app (auto/ manual)
5. CGM Screening Workflow: CGM screening: confirm app version (auto)
6. CGM Screening Workflow: CGM screening: confirm medications
7. CGM Screening Workflow: CGM screening: user willingness (auto)
8. CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)
9. CGM Screening Workflow: CGM screening: review survey (auto)

3) CGM Screening Workflow: CGM screening: check state of residence (auto)

Task Priority	7
How Task is Generated	Part of CGM Screening Workflow
How Task is Resolved	Automatic: The system will check the member's state and resolve this task automatically if eligible to continue.

22.3.4 CGM Screening Workflow: CGM screening: message member to update the app (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM Screening Workflow: CGM screening: check plan (auto)
2. CGM Screening Workflow: CGM screening: check phone type (auto)

3. CGM Screening Workflow: CGM screening: check state of residence (auto)
4. **CGM Screening Workflow: CGM screening: message member to update the app (auto/ manual)**
5. CGM Screening Workflow: CGM screening: confirm app version (auto)
6. CGM Screening Workflow: CGM screening: confirm medications
7. CGM Screening Workflow: CGM screening: user willingness (auto)
8. CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)
9. CGM Screening Workflow: CGM screening: review survey (auto)

4) CGM Screening Workflow: CGM screening: message member to update the app (auto/ manual)

Task Priority	5
How Task is Generated	Part of CGM Screening Workflow
How Task is Resolved	Automatic: The system will automatically resolve this task if the member's app is up to date.
Recommended Steps	If this task is not automatically resolved, check app version (under Member Profile.) Message member to update the app.

22.3.5 CGM Screening Workflow: CGM screening: confirm app version (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM Screening Workflow: CGM screening: check plan (auto)
2. CGM Screening Workflow: CGM screening: check phone type (auto)
3. CGM Screening Workflow: CGM screening: check state of residence (auto)
4. CGM Screening Workflow: CGM screening: message member to update the app (auto/ manual)
5. **CGM Screening Workflow: CGM screening: confirm app version (auto)**
6. CGM Screening Workflow: CGM screening: confirm medications
7. CGM Screening Workflow: CGM screening: user willingness (auto)
8. CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)
9. CGM Screening Workflow: CGM screening: review survey (auto)

5) CGM Screening Workflow: CGM screening: confirm app version (auto)

Task Priority	8
How Task is Generated	Part of CGM Screening Workflow

How Task is Resolved	Automatic: The system will resolve this task automatically if the member has the most up to date version of the app.

22.3.6 CGM Screening Workflow: CGM screening: confirm medications

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM Screening Workflow: CGM screening: check plan (auto)
2. CGM Screening Workflow: CGM screening: check phone type (auto)
3. CGM Screening Workflow: CGM screening: check state of residence (auto)
4. CGM Screening Workflow: CGM screening: message member to update the app (auto/ manual)
5. CGM Screening Workflow: CGM screening: confirm app version (auto)
6. **CGM Screening Workflow: CGM screening: confirm medications**
7. CGM Screening Workflow: CGM screening: user willingness (auto)
8. CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)
9. CGM Screening Workflow: CGM screening: review survey (auto)

6) CGM Screening Workflow: CGM screening: confirm medications

Task Priority	8
How Task is Generated	Part of CGM Screening Workflow
How Task is Resolved	Manual: the system will present a question asking, “Is the member using disqualifying medications, such as hydroxyurea?” If the coach answers “No,” the task resolves and workflow proceeds to next step. If the coach answers “Yes,” the workflow is canceled.

22.3.7 CGM Screening Workflow: CGM screening: user willingness (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

10. CGM Screening Workflow: CGM screening: check plan (auto)
11. CGM Screening Workflow: CGM screening: check phone type (auto)
12. CGM Screening Workflow: CGM screening: check state of residence (auto)
13. CGM Screening Workflow: CGM screening: message member to update the app (auto/ manual)
14. CGM Screening Workflow: CGM screening: confirm app version (auto)
15. CGM Screening Workflow: CGM screening: confirm medications
16. **CGM Screening Workflow: CGM screening: user willingness (auto)**
17. CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)
18. CGM Screening Workflow: CGM screening: review survey (auto)

7) CGM Screening Workflow: CGM screening: user willingness (auto)

Task Priority	9
How Task is Generated	Once the system validates payor, phone type, state and app version, the CGM willingness flow in the app is triggered for the member. Task triggers to coach if after 3 days of offer being active, member has still taken no action (you will see it as a future task before then).
How Task is Resolved	Automatic: Auto-resolves if member opts in in the app or manual.
Recommended Steps	If this task is triggered, refer the member to their app to review steps and information about the CGM. If a member is willing to try CGM and completes the flow in the app, this task will auto-resolve. This will trigger the CGM survey to appear in the app and the member will be prompted to complete. If a member does not express willingness, via the app flow, this will trigger "CGM Eligibility: Review Member opt-out" task. If member takes no action, 14 days after the offer is initiated, it will expire and this task will disappear.

22.3.8 CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM Screening Workflow: CGM screening: check plan (auto)
2. CGM Screening Workflow: CGM screening: check phone type (auto)
3. CGM Screening Workflow: CGM screening: check state of residence (auto)
4. CGM Screening Workflow: CGM screening: message member to update the app (auto/ manual)
5. CGM Screening Workflow: CGM screening: confirm app version (auto)
6. CGM Screening Workflow: CGM screening: confirm medications
7. CGM Screening Workflow: CGM screening: user willingness (auto)
8. **CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)**
9. CGM Screening Workflow: CGM screening: review survey (auto)

8) CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)

Task Priority	7
How Task is Generated	When a member does not express willingness, via the app flow, this will trigger “CGM Eligibility: Review Member opt-out” task.
How Task is Resolved	Automatic: Auto-resolved if not opted out, manual if member opted out
Recommended Steps	When the ‘review CGM opt-out’ task is triggered, provide benefits to overcome any objections and lead to opt-in. Resolve task with YES (if member decided to opt in) or NO.

22.3.9 CGM Screening Workflow: CGM screening: review survey (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM Screening Workflow: CGM screening: check plan (auto)
2. CGM Screening Workflow: CGM screening: check phone type (auto)
3. CGM Screening Workflow: CGM screening: check state of residence (auto)
4. CGM Screening Workflow: CGM screening: message member to update the app (auto/ manual)
5. CGM Screening Workflow: CGM screening: confirm app version (auto)
6. CGM Screening Workflow: CGM screening: confirm medications
7. CGM Screening Workflow: CGM screening: user willingness (auto)
8. CGM Screening Workflow: CGM screening: review CGM opt-out (auto/ manual)
9. **CGM Screening Workflow: CGM screening: review survey (auto)**

9) CGM Screening Workflow: CGM screening: review survey (auto)

Task Priority	7
How Task is Generated	Part of CGM Screening Workflow
How Task is Resolved	Automatic: This task will auto resolve as soon as the member completes the CGM Survey.
Recommended Steps	Survey results will appear under Reports.

22.4 CGM Async Visit Workflow

22.4.1 CGM Async Visit Workflow: CGM async visit: verify provider information is up to date (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **CGM Async Visit Workflow: CGM async visit: verify provider information is up to date (auto/ manual)**
2. CGM Async Visit Workflow: CGM async visit: schedule appointment (auto)
3. CGM Async Visit Workflow: CGM async visit: import encounter summary (auto)

1) CGM Async Visit Workflow: CGM async visit: verify provider information is up to date (auto/ manual)

Task Description	Name: Provider, City: xyz, Phone: 11111111
Task Priority	8
How Task is Generated	Part of CGM: Async Visit Workflow
How Task is Resolved	Manual or Automatic. This task auto-resolves if member didn't enter PCP info in the CGM survey.
Recommended Steps	Add Endo/PCP info from CGM survey to console under Healthcare Professionals.

22.4.2 CGM Async Visit Workflow: CGM async visit: schedule appointment (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM Async Visit Workflow: CGM async visit: verify provider information is up to date (auto/ manual)
2. **CGM Async Visit Workflow: CGM async visit: schedule appointment (auto)**
3. CGM Async Visit Workflow: CGM async visit: import encounter summary (auto)

2) CGM Async Visit Workflow: CGM async visit: schedule appointment (auto)

Task Priority	5
How Task is Generated	Part of CGM: Async Visit Workflow
How Task is Resolved	Automatic: This task is auto-resolved and at this point the Doctor is notified to do an Async review to determine if the member is eligible.

22.4.3 CGM Async Visit Workflow: CGM async visit: import encounter summary (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM Async Visit Workflow: CGM async visit: verify provider information is up to date (auto/ manual)
2. CGM Async Visit Workflow: CGM async visit: schedule appointment (auto)
3. **CGM Async Visit Workflow: CGM async visit: import encounter summary (auto)**

3) CGM Async Visit Workflow: CGM async visit: import encounter summary (auto)

Task Priority	5
How Task is Generated	Part of CGM: Async Visit Workflow
How Task is Resolved	Automatic: Resolved once the doctor has completed the async review and encounter summary is sent to the Console.
Recommended Steps	Encounter Summary will appear under Reports.

22.5 CGM PWN Referral Workflow

22.5.1 CGM PWN Referral Workflow: CGM PWN referral: make PWN order (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **CGM PWN Referral Workflow: CGM PWN referral: make PWN order (auto)**
2. CGM PWN Referral Workflow: CGM PWN referral: import encounter summary (auto)

1) CGM PWN Referral Workflow: CGM PWN referral: make PWN order (auto)

Task Priority	5
How Task is Generated	Part of PWN Referral Workflow
How Task is Resolved	Automatic
Recommended Steps	The system will send a referral to a doctor outside of Onduo to review and approve the CGM prescription automatically.

22.5.2 CGM PWN Referral Workflow: CGM PWN referral: import encounter summary (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM PWN Referral Workflow: CGM PWN referral: make PWN order (auto)
2. **CGM PWN Referral Workflow: CGM PWN referral: import encounter summary (auto)**

2) CGM PWN Referral Workflow: CGM PWN referral: import encounter summary (auto)

Task Priority	5
How Task is Generated	Part of PWN Referral Workflow
How Task is Resolved	Automatic: This will be auto resolved once PWN doctor completes CGM review.
Recommended Steps	Encounter Summary will appear under Reports.

22.6 CGM In-App Visit Workflow

22.6.1 CGM In-App Visit Workflow: Sync visit: message member to update app (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **CGM In-App Visit Workflow: Sync visit: message member to update app (auto/ manual)**
2. CGM In-App Visit Workflow: Sync visit: confirm app version (auto)
3. CGM In-App Visit Workflow: Sync visit: confirm eligibility for Onduo PC (auto/ manual)
4. CGM In-App Visit Workflow: Sync visit: high deductible check (manual)
5. CGM In-App Visit Workflow: Sync visit: send Yosi scheduling link (auto)
6. CGM In-App Visit Workflow: Sync visit: import encounter summary (auto)

1) CGM In-App Visit Workflow: Sync visit: message member to update app (auto/ manual)

Task Priority	5
How Task is Generated	Part of CGM In-App Visit Workflow
How Task is Resolved	Automatic: System auto-resolves this step if the member is already on an up to date version.
Recommended Steps	If this task is not automatically resolved, check app version (under Member Profile). Message member to update the app.

22.6.2 CGM In-App Visit Workflow: Sync visit: confirm app version (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM In-App Visit Workflow: Sync visit: message member to update app (auto/ manual)
2. **CGM In-App Visit Workflow: Sync visit: confirm app version (auto)**
3. CGM In-App Visit Workflow: Sync visit: confirm eligibility for Onduo PC (auto/ manual)

4. CGM In-App Visit Workflow: Sync visit: high deductible check (manual)
5. CGM In-App Visit Workflow: Sync visit: send Yosi scheduling link (auto)
6. CGM In-App Visit Workflow: Sync visit: import encounter summary (auto)

2) CGM In-App Visit Workflow: Sync visit: confirm app version (auto)

Task Priority	7
How Task is Generated	Part of CGM In-App Visit Workflow
How Task is Resolved	Automatic: This task will be auto resolved by the system.

22.6.3 CGM In-App Visit Workflow: Sync visit: confirm eligibility for Onduo PC (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM In-App Visit Workflow: Sync visit: message member to update app (auto/ manual)
2. CGM In-App Visit Workflow: Sync visit: confirm app version (auto)
3. **CGM In-App Visit Workflow: Sync visit: confirm eligibility for Onduo PC (auto/ manual)**
4. CGM In-App Visit Workflow: Sync visit: high deductible check (manual)
5. CGM In-App Visit Workflow: Sync visit: send Yosi scheduling link (auto)
6. CGM In-App Visit Workflow: Sync visit: import encounter summary (auto)

3) CGM In-App Visit Workflow: Sync visit: confirm eligibility for Onduo PC (auto/ manual)

Task Priority	8
How Task is Generated	Part of CGM In-App Visit Workflow
How Task is Resolved	Automatic Auto-resolves for the CGM Sync visit workflow.

22.6.4 CGM In-App Visit Workflow: Sync visit: high-deductible check (manual)

1. CGM In-App Visit Workflow: Sync visit: message member to update app (auto/ manual)
2. CGM In-App Visit Workflow: Sync visit: confirm app version (auto)
3. CGM In-App Visit Workflow: Sync visit: confirm eligibility for Onduo PC (auto/ manual)
4. **CGM In-App Visit Workflow: Sync visit: high deductible check (manual)**
5. CGM In-App Visit Workflow: Sync visit: send Yosi scheduling link (auto)
6. CGM In-App Visit Workflow: Sync visit: import encounter summary (auto)

4) CGM In-App Visit Workflow: Sync visit: high-deductible check (manual)

Task Priority	7
How Task is Generated	Part of CGM In-App Visit Workflow

How Task is Resolved	Manual: the coach manually resolves this after checking whether the member is in a high-deductible health plan. If the coach selects “yes”, additional text will be sent via messaging informing the member of potential extra costs when the scheduling link is sent (see next task below)

22.6.5 CGM In-App Visit Workflow: Sync visit: send Yosi scheduling link (auto)

1. CGM In-App Visit Workflow: Sync visit: message member to update app (auto/ manual)
2. CGM In-App Visit Workflow: Sync visit: confirm app version (auto)
3. CGM In-App Visit Workflow: Sync visit: confirm eligibility for Onduo PC (auto/ manual)
4. CGM In-App Visit Workflow: Sync visit: high deductible check (manual)
5. **CGM In-App Visit Workflow: Sync visit: send Yosi scheduling link (auto)**
6. CGM In-App Visit Workflow: Sync visit: import encounter summary (auto)

5) CGM In-App Visit Workflow: Sync visit: send Yosi scheduling link (auto)

Task Priority	8
How Task is Generated	Part of CGM In-App Visit Workflow
How Task is Resolved	The system sends the Yosi scheduling link and an accompanying message in the messaging thread: *Automated message (on coach's behalf): To allow us to give you a prescription for the CGM, the doctor at Onduo will need to have a video appointment with you.* *For a video visit, you will chat with the doctor on your smartphone at a time you pick. You will be able to select a date and time that works best for you. A visit lasts about 20-30 minutes.* *Please schedule a visit at <yosi link>.* If the member is high deductible, more text will be included: *Note that Onduo is being covered by your Health Plan or Employer/Health System. However, just like any doctor's visit, if you are covered by a High Deductible Plan and/or have a Health Savings Account, you may have to pay out of pocket for some services with Onduo until you meet your*

	deductible. This could include co-pays, coinsurance, and deductibles. *If you have questions about your benefits and costs for you, please call the phone number on the back of your insurance card and ask about the member cost share for Onduo telemedicine services.*

22.6.6 CGM In-App Visit Workflow: Sync visit: import encounter summary (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM In-App Visit Workflow: Sync visit: message member to update app (auto/ manual)
2. CGM In-App Visit Workflow: Sync visit: confirm app version (auto)
3. CGM In-App Visit Workflow: Sync visit: confirm eligibility for Onduo PC (auto/ manual)
4. CGM In-App Visit Workflow: Sync visit: high deductible check (manual)
5. CGM In-App Visit Workflow: Sync visit: send Yosi scheduling link (auto)
6. **CGM In-App Visit Workflow: Sync visit: import encounter summary (auto)**

6) CGM In-App Visit Workflow: Sync visit: import encounter summary (auto)

Task Priority	5
How Task is Generated	Part of CGM In-App Visit Workflow
How Task is Resolved	Automatic
Recommended Steps	Once a visit is completed, the Encounter Summary will automatically populate under Reports in the Console.

22.7 CGM: Post Visit Workflow

22.7.1 CGM: Post Visit Workflow: CGM post-visit: initiate CGM shipment (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **CGM: Post Visit Workflow: CGM post-visit: initiate CGM shipment (manual)**
2. CGM: Post Visit Workflow: CGM post-visit: fax encounter summary to PCP (auto/ manual)
3. CGM: Post Visit Workflow: CGM post-visit: check in about new CGM (manual)

1) CGM: Post Visit Workflow: CGM post-visit: initiate CGM shipment (manual)

Task Priority	5
How Task is Generated	Part of CGM Post Visit Workflow
How Task is Resolved	Automatic: This task will resolve automatically once you ship the CGM.

Recommended Steps	This task will resolve automatically once you ship the CGM. Do not manually resolve this task.

22.7.2 CGM: Post Visit Workflow: CGM post-visit: fax encounter summary to PCP (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM: Post Visit Workflow: CGM post-visit: initiate CGM shipment (manual)
2. **CGM: Post Visit Workflow: CGM post-visit: fax encounter summary to PCP (auto/ manual)**
3. CGM: Post Visit Workflow: CGM post-visit: check in about new CGM (manual)

2) CGM: Post Visit Workflow: CGM post-visit: fax encounter summary to PCP (auto/ manual)

Task Priority	7
How Task is Generated	Part of CGM Post Visit Workflow
How Task is Resolved	Automatic or Manual: The Visit summary will automatically be sent to member's PCP post synch-CGM visit.
Recommended Steps	For all async CGM appointments, Care Leads may resolve this task.

22.7.3 CGM: Post Visit Workflow: CGM post-visit: check in about new CGM (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. CGM: Post Visit Workflow: CGM post-visit: initiate CGM shipment (manual)
2. CGM: Post Visit Workflow: CGM post-visit: fax encounter summary to PCP (auto/ manual)
3. **CGM: Post Visit Workflow: CGM post-visit: check in about new CGM (manual)**

3) CGM: Post Visit Workflow: CGM post-visit: check in about new CGM (manual)

Task Priority	7
How Task is Generated	Part of CGM Post Visit Workflow
How Task is Resolved	Manual
Recommended Steps	Inform the member that a new CGM is shipped.

22.8 MD Referral: Labs Workflow

22.8.1 MD Referral: Labs Workflow: MD ref: obtain any existing labs

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **MD Referral: Labs Workflow: MD ref: obtain any existing labs**
2. MD Referral: Labs Workflow: MD ref: MD orders missing labs
3. MD Referral: Labs Workflow: MD ref. : verify lab labs

1) MD Referral: Labs Workflow: MD ref: obtain any existing labs

Task Priority	8
How Task is Generated	Part of MD Referral: Labs Workflow
How Task is Resolved	Manual
Recommended Steps	Clinic

22.8.2 MD Referral: Labs Workflow: MD ref: MD orders missing labs

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: Labs Workflow: MD ref: obtain any existing labs
2. **MD Referral: Labs Workflow: MD ref: MD orders missing labs**
3. MD Referral: Labs Workflow: MD ref. : verify lab labs

2) MD Referral: Labs Workflow: MD ref: MD orders missing labs

Task Priority	8
How Task is Generated	Part of MD Referral: Labs Workflow
How Task is Resolved	Manual (Task is skipped if already have labs)
Recommended Steps	Clinic

22.8.3 MD Referral: Labs Workflow: MD ref. : verify lab labs

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: Labs Workflow: MD ref: obtain any existing labs
2. MD Referral: Labs Workflow: MD ref: MD orders missing labs
3. **MD Referral: Labs Workflow: MD ref. : verify lab labs**

3) MD Referral: Labs Workflow: MD ref. : verify lab labs

Task Priority	8

How Task is Generated	Part of MD Referral: Labs Workflow
How Task is Resolved	Manual (Task is skipped if already have labs)
Recommended Steps	Clinic

22.9 MD Referral: In-App Video Visit Workflow

22.9.1 MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app**
2. MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/manual)
4. MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment
9. MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

1) MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app

Task Description	Sync visit: message member to update app
Task Priority	5
How Task is Generated	Part of MD Ref: In-app Video Visit Workflow
How Task is Resolved	If the member's app is up to date - it will resolve automatically; if not - CL should remind the member to update the app and then resolve the task manually.
Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile). Message member to update the app.

22.9.2 MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app
2. **MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version**
3. MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment
9. MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

2) MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version

Task Description	Sync visit: confirm app version
Task Priority	8
How Task is Generated	Part of MD Ref: In-app Video Visit Workflow
How Task is Resolved	Automatic: If the app is up to date, this task will auto-resolve.

22.9.3 MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version
3. **MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)**
4. MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member

8. MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment
9. MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

3) MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)

Task Description	7
Task Priority	Sync visit: confirm member willingness (auto/ manual)
How Task is Generated	Part of MD Ref: In-App Visit Workflow. The system automatically sends the member the willingness card after ‘confirm app version’ is resolved.
How Task is Resolved	If member says YES to the visit in the app, ‘Confirm member willingness’ is auto-resolved. If member doesn’t complete the ‘confirm member willingness’ challenge in 7 days, the care lead is assigned ‘confirm member willingness’ task to follow up. Resolve manually with ‘YES’ if member agrees to telemedicine visit via messaging.
Recommended Steps	System automatically sends the member willingness card after ‘confirm app version’ is resolved. On the homepage of the app under the ‘For You’ section the member should see a section titled ‘Learn the benefits of a video visit- With a video visit, you can chat with a doctor about side effects, medication costs and more.’ If member Opts-out ‘follow-up with member concerning appointment unwillingness’ task is triggered (+in app opt-out survey is triggered for the member; results will show up under Events).

22.9.4 MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. **MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC**
5. MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment
9. MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

4) MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC

Task Description	Sync visit: confirm eligibility for Onduo PC
Task Priority	8
How Task is Generated	Part of MD Ref: In-App Visit Workflow
How Task is Regenerated	Automatic or Manual
How Task is Resolved	The eligibility task will auto-resolve and cancel strategy if no provider is in the member's state of residence. If resolved with NO, it will cancel the strategy.

22.9.5 MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC

5. **MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)**
6. MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment
9. MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

5) MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

Task Description	Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
Task Priority	5
How Task is Generated	Part of MD Ref: In-App Visit Workflow
How Task is Regenerated	Automatic: This task auto-resolves with availability of MD in Athena; searches 60 min block (but members will see appointments of 30 min).
How Task is Resolved	If this task is not automatically resolved, troubleshoot appointment availability in Athena.

22.9.6 MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/manual)
4. MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. **MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)**
7. MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment
9. MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)

10. MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

6) MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)

Task Description	Details for the task: Resolving this task will automatically message a video visit scheduling card to the Member. A similar card will also appear on the dashboard of their Onduo app.
Task Priority	5
How Task is Generated	Part of MD Ref: In-App Visit Workflow
How Task is Resolved	Manual: When resolved, the system displays a scheduling card on the member's home screen. (Members are unable to schedule sooner than 2 business days out.)
Recommended Steps	The card will remain active until the member schedules or the strategy is canceled.

22.9.7 MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/manual)
4. MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. **MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member**
8. MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment
9. MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

7) MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member

Task Priority	5
How Task is Generated	Triggered in 3 days if the member has not scheduled an appointment.
How Task is Resolved	Manual: Coach sends a message to the patient.
Recommended Steps	Encourage the member to schedule an MD appointment, and check if they are having any technical issues.

22.9.8 MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/manual)
4. MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member
8. **MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment**
9. MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

8) MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment

Task Description	Sync visit: Schedule appointment
Task Priority	8
How Task is Generated	Part of MD Ref: In-App Video Visit Workflow
How Task is Resolved	Automatic: Automatically resolved when an appointment is scheduled.

22.9.9 MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/manual)
4. MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment
9. **MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)**
10. MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

9) MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)

Task Description	Sync visit: send appointment reminder, confirm medication (manual)
Task Priority	8
How Task is Generated	Part of MD Ref: In-App Visit Workflow. This task indicates that the member has scheduled their appointment.
How Task is Resolved	Manual
Recommended Steps	Members who do not opt out of the reminder in the app will receive automatic reminders about their appointment. Note: The date/ time of the appointment will appear under PROVIDER VISITS.

22.9.10 MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version

3. MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment
9. MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. **MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)**
11. MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

10) MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)

Task Description	Sync visit: verify provider information is up to date (manual)
Task Priority	8
How Task is Generated	Part of MD Ref: In-App Video Visit Workflow
How Task is Resolved	Manual
Recommended Steps	If the info has not been added into the app already, ask who the member's PCP is and add the name, address and phone number into the console (unverified), and resolve this task.

22.9.11 MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)

7. MD Referral: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral: In-App Video Visit Workflow: Sync visit: Schedule appointment
9. MD Referral: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. **MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)**

11) MD Referral: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

Task Description	Sync visit: import encounter summary (auto)
Task Priority	5
How Task is Generated	Part of MD Ref: In-App Video Visit Workflow
How Task is Resolved	Automatic: This task auto-resolves once the Encounter summary is sent to the Console (under Reports).

22.10 MD Referral: Post Visit Workflow

22.10.1 MD Referral: Post Visit Workflow: MD ref: post-visit: Send Patient Instructions to Member (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **MD Referral: Post Visit Workflow: MD ref: post-visit: Send Patient Instructions to Member (manual)**
2. MD Referral: Post Visit Workflow: MD ref: post-visit: Confirm whether meds changed (manual)
3. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm Rx filled
4. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm member understanding of new regimen
5. MD Referral: Post Visit Workflow: MD ref. post-visit: start MD referral visit workflow for follow-up if needed
6. MD Referral: Post Visit Workflow: MD ref. post-visit: start strategies to confirm adherence
7. MD Referral: Post Visit Workflow: MD ref. post-visit: Clinic file review

1) MD Referral: Post Visit Workflow: MD ref: post-visit: Send Patient Instructions to Member (manual)

Task Description	MD ref: post-visit: Send Patient Instructions to Member (manual)

Task Priority	4
How Task is Generated	Part of MD Ref. Post-visit Workflow
How Task is Resolved	Manual
Recommended Steps	Clinic

22.10.2 MD Referral: Post Visit Workflow: MD ref: post-visit: Confirm whether meds changed (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: Post Visit Workflow: MD ref: post-visit: Send Patient Instructions to Member (manual)
2. **MD Referral: Post Visit Workflow: MD ref: post-visit: Confirm whether meds changed (manual)**
3. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm Rx filled
4. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm member understanding of new regimen
5. MD Referral: Post Visit Workflow: MD ref. post-visit: start MD referral visit workflow for follow-up if needed
6. MD Referral: Post Visit Workflow: MD ref. post-visit: start strategies to confirm adherence
7. MD Referral: Post Visit Workflow: MD ref. post-visit: Clinic file review

2) MD Referral: Post Visit Workflow: MD ref: post-visit: Confirm whether meds changed (manual)

Task Description	MD ref: post-visit: Confirm whether meds changed (manual)
Task Priority	8
How Task is Generated	Part of MD Ref. Post-visit Workflow
How Task is Resolved	Manual: Resolve the task with “YES” if there was a medication change and “NO” if there were no medication changes.
Recommended Steps	Clinic

22.10.3 MD Referral: Post Visit Workflow: MD ref. post-visit: confirm Rx filled

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: Post Visit Workflow: MD ref: post-visit: Send Patient Instructions to Member (manual)
2. MD Referral: Post Visit Workflow: MD ref: post-visit: Confirm whether meds changed (manual)
3. **MD Referral: Post Visit Workflow: MD ref. post-visit: confirm Rx filled**
4. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm member understanding of new regimen
5. MD Referral: Post Visit Workflow: MD ref. post-visit: start MD referral visit workflow for follow-up if needed
6. MD Referral: Post Visit Workflow: MD ref. post-visit: start strategies to confirm adherence
7. MD Referral: Post Visit Workflow: MD ref. post-visit: Clinic file review

3) MD Referral: Post Visit Workflow: MD ref. post-visit: confirm Rx filled

Task Description	MD ref. post-visit: confirm Rx filled
Task Priority	8
How Task is Generated	Part of MD Ref. Post-visit Workflow
How Task is Resolved	MD ref. post-visit: confirm Rx filled
Recommended Steps	Clinic

22.10.4 MD Referral: Post Visit Workflow: MD ref. post-visit: confirm member understanding of new regimen

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: Post Visit Workflow: MD ref: post-visit: Send Patient Instructions to Member (manual)
2. MD Referral: Post Visit Workflow: MD ref: post-visit: Confirm whether meds changed (manual)
3. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm Rx filled
4. **MD Referral: Post Visit Workflow: MD ref. post-visit: confirm member understanding of new regimen**
5. MD Referral: Post Visit Workflow: MD ref. post-visit: start MD referral visit workflow for follow-up if needed
6. MD Referral: Post Visit Workflow: MD ref. post-visit: start strategies to confirm adherence
7. MD Referral: Post Visit Workflow: MD ref. post-visit: Clinic file review

4) MD Referral: Post Visit Workflow: MD ref. post-visit: confirm member understanding of new regimen

Task Description	MD ref. post-visit: confirm member understanding of new regimen
Task Priority	8
How Task is Generated	Part of MD Ref. Post-visit Workflow
How Task is Resolved	Manual
Recommended Steps	Review the Encounter summary for any lifestyle changes recommended by the MD, and add to the Care Plan to follow up with the member.

22.10.5 MD Referral: Post Visit Workflow: MD ref. post-visit: start MD referral visit workflow for follow-up if needed

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: Post Visit Workflow: MD ref: post-visit: Send Patient Instructions to Member (manual)
2. MD Referral: Post Visit Workflow: MD ref: post-visit: Confirm whether meds changed (manual)
3. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm Rx filled
4. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm member understanding of new regimen
5. **MD Referral: Post Visit Workflow: MD ref. post-visit: start MD referral visit workflow for follow-up if needed**
6. MD Referral: Post Visit Workflow: MD ref. post-visit: start strategies to confirm adherence
7. MD Referral: Post Visit Workflow: MD ref. post-visit: Clinic file review

5) MD Referral: Post Visit Workflow: MD ref. post-visit: start MD referral visit workflow for follow-up if needed

Task Description	MD ref. post-visit: start MD referral visit workflow for follow-up if needed
Task Priority	8
How Task is Generated	Part of MD Ref. Post-visit Workflow
How Task is Resolved	Manual

22.10.6 MD Referral: Post Visit Workflow: MD ref. post-visit: start strategies to confirm adherence

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: Post Visit Workflow: MD ref: post-visit: Send Patient Instructions to Member (manual)
2. MD Referral: Post Visit Workflow: MD ref: post-visit: Confirm whether meds changed (manual)
3. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm Rx filled
4. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm member understanding of new regimen
5. MD Referral: Post Visit Workflow: MD ref. post-visit: start MD referral visit workflow for follow-up if needed
6. **MD Referral: Post Visit Workflow: MD ref. post-visit: start strategies to confirm adherence**
7. MD Referral: Post Visit Workflow: MD ref. post-visit: Clinic file review

6) MD Referral: Post Visit Workflow: MD ref. post-visit: start strategies to confirm adherence

Task Description	MD ref. post-visit: start strategies to confirm adherence
Task Priority	8
How Task is Generated	Part of MD Ref. Post-visit Workflow
How Task is Resolved	Manual

22.10.7 MD Referral: Post Visit Workflow: MD ref. post-visit: Clinic file review

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral: Post Visit Workflow: MD ref: post-visit: Send Patient Instructions to Member (manual)
2. MD Referral: Post Visit Workflow: MD ref: post-visit: Confirm whether meds changed (manual)
3. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm Rx filled
4. MD Referral: Post Visit Workflow: MD ref. post-visit: confirm member understanding of new regimen
5. MD Referral: Post Visit Workflow: MD ref. post-visit: start MD referral visit workflow for follow-up if needed
6. MD Referral: Post Visit Workflow: MD ref. post-visit: start strategies to confirm adherence
7. **MD Referral: Post Visit Workflow: MD ref. post-visit: Clinic file review**

7) MD Referral: Post Visit Workflow: MD ref. post-visit: Clinic file review

Task Description	MD ref. post-visit: Clinic file review
Task Priority	4
How Task is Generated	Part of MD Ref. Post-visit Workflow
How Task is Resolved	Manual

22.11 MD Referral Follow-up: In-App Video Visit Workflow

22.11.1 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app**
2. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointment
9. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

1) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app

Task Description	Sync visit: message member to update app

Task Priority	5
How Task is Generated	Part of MD Ref: In-app Video Visit Workflow
How Task is Regenerated	Automatic or Manual
How Task is Resolved	When the member's app is up to date, it will resolve automatically. If not, the care lead should remind the member to update the app, and then resolve the task manually.
Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile). Message member to update the app.

22.11.2 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app
2. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version**
3. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member
7. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointmentMD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
8. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
9. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

2) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version

Task Description	Sync visit: confirm app version

Task Priority	8
How Task is Generated	Part of MD Ref: In-app Video Visit Workflow
How Task is Regenerated	Automatic
How Task is Resolved	Automatic: If the app is up to date, this task will auto-resolve.

22.11.3 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version
3. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)**
4. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointmentMD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
9. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
10. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

3) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)

Task Description	Sync visit: confirm member willingness (auto/ manual)
Task Priority	7

How Task is Generated	Part of MD Ref: In-App Visit Workflow The system automatically sends the member a willingness card after ‘confirm app version’ is resolved.
How Task is Regenerated	Automatic or Manual
How Task is Resolved	If the member says YES to the visit in the app, ‘Confirm member willingness’ is auto-resolved. If the member doesn’t complete the ‘confirm member willingness’ challenge in 7 days, the care lead is assigned ‘confirm member willingness’ task to follow up. Resolve manually with ‘YES’ if the member agrees to telemedicine visit via messaging.
Recommended Steps	System automatically sends the member willingness card after ‘confirm app version’ is resolved. On the homepage of the app under the ‘For You’ section, the member should see a section titled ‘Learn the benefits of a video visit- With a video visit, you can chat with a doctor about side effects, medication costs and more.’ If member Opts-out ‘follow-up with member concerning appointment unwillingness’ task is triggered (and an in-app opt-out survey is triggered for the member; results will show up under Events).

22.11.4 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC**

5. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member
7. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointmentMD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
8. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
9. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

4) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC

Task Description	Sync visit: confirm eligibility for Onduo PC
Task Priority	8
How Task is Generated	Part of MD Ref: In-App Visit Workflow
How Task is Regenerated	Automatic or Manual
How Task is Resolved	Automatic: The eligibility task will auto-resolve and cancel strategy if no provider is in the member's state of residence. If resolved with NO, it will cancel the strategy.

22.11.5 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC

5. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)**
6. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointment
9. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

5) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

Task Description	Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
Task Priority	5
How Task is Generated	Part of MD Ref: In-App Visit Workflow
How Task is Resolved	Automatic: This task auto-resolves with availability of MD in Athena; searches 60 min block (but members will see appointments of 30 min).
Recommended Steps	If this task is not automatically resolved, troubleshoot appointment availability in Athena.

22.11.6 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)

4. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)**
7. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointment
9. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

6) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)

Task Description	Sync visit: send scheduling card (manual)
Task Priority	5
How Task is Generated	Part of MD Ref: In-App Visit Workflow
How Task is Resolved	Manual: When resolved, the system displays a scheduling card on the member's home screen. (Members are unable to schedule sooner than 2 business days out.)
Recommended Steps	The card will remain active until the member schedules or the strategy is canceled.

22.11.7 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC

5. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member**
8. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointment
9. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

7) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member

Task Priority	5
How Task is Generated	Triggered in 3 days if the member has not scheduled an appointment.
How Task is Resolved	Manual: Coach sends a message to the patient.
Recommended Steps	Encourage the member to schedule an MD appointment, and check if they are having any technical issues.

22.11.8 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointment

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member

8. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointment**
9. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)
10. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

8) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointment

Task Description	Sync visit: schedule appointment
Task Priority	8
How Task is Generated	Part of MD Ref: In-App Video Visit Workflow
How Task is Resolved	Automatic: This task auto-resolves when an appointment is scheduled.

22.11.9 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointment
9. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)**
10. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

9) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)

Task Description	Sync visit: send appointment reminder, confirm medication (manual)
Task Priority	8
How Task is Generated	Part of MD Ref: In-App Visit Workflow This task indicates that the member has scheduled their appointment.
How Task is Resolved	Manual
Recommended Steps	Members who do not opt out of the reminder in the app will receive automatic reminders about their appointment. Note: The Date/ time of the appointment will appear under PROVIDER VISITS.

22.11.10 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointment
9. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)

10. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)**
11. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

10) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)

Task Description	Sync visit: verify provider information is up to date (manual)
Task Priority	8
How Task is Generated	Part of MD Ref: In-App Visit Workflow
How Task is Resolved	Manual
Recommended Steps	If the info has not been added into the app already, ask who the member's PCP is and add the name, address and phone number into the console (unverified), and resolve the task.

22.11.11 MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: message member to update app
2. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm app version
3. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm member willingness (auto/ manual)
4. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm eligibility for Onduo PC
5. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send scheduling card (manual)
7. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: Check in with member
8. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: schedule appointment
9. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: send appointment reminder, confirm medication (manual)

10. MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: verify provider information is up to date (manual)
11. **MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)**

11) MD Referral Follow-up: In-App Video Visit Workflow: Sync visit: import encounter summary (auto)

Task Description	Sync visit: import encounter summary (auto)
Task Priority	5
How Task is Generated	Part of MD Ref: In-App Visit Workflow
How Task is Resolved	Automatic: This task auto-resolves once the Encounter summary is sent to the Console (under Reports).

22.12 In-App Visit Workflow (other)

22.12.1 In-App Visit Workflow (other): Sync visit: Notify member of appointment cancellation

[Workflow description]
After one task is resolved in the workflow, the system will automatically generate the next task.

1. **In-App Visit Workflow (other): Sync visit: Notify member of appointment cancellation**
2. In-App Visit Workflow (other): Sync visit: appointment canceled, follow up with member
3. In-App Visit Workflow (other): Sync visit: no availability, follow up with member
4. In-App Visit Workflow (other): Review survey- In App Video Visit Survey (auto)
5. In-App Visit Workflow (other): Follow-up with member concerning appointment unwillingness

1) In-App Visit Workflow (other): Sync visit: Notify member of appointment cancellation

Task Priority	4
How Task is Generated	When Care Lead cancels a scheduled provider visit
How Task is Regenerated	n/a
How Task is Resolved	Manual
Recommended Steps	Message the member regarding the cancellation and restart the workflow to allow the member to reschedule their visit (if applicable)

22.12.2 In-App Visit Workflow (other): Sync visit: appointment canceled, follow up with member

[Workflow description]
After one task is resolved in the workflow, the system will automatically generate the next task.

1. In-App Visit Workflow (other): Sync visit: Notify member of appointment cancellation
2. **In-App Visit Workflow (other): Sync visit: appointment canceled, follow up with member**
3. In-App Visit Workflow (other): Sync visit: no availability, follow up with member
4. In-App Visit Workflow (other): Review survey- In App Video Visit Survey (auto)
5. In-App Visit Workflow (other): Follow-up with member concerning appointment unwillingness

2) In-App Visit Workflow (other): Sync visit: appointment canceled, follow up with member

Task Priority	4
How Task is Generated	Member canceled MD Referral visit appointment scheduled in-app
How Task is Regenerated	n/a
How Task is Resolved	Manual
Recommended Steps	Message the member to follow up about appointment cancellation and resolve this task. Note: The “Confirm member willingness” task will still be open at this point in addition to this task so that if you discuss rescheduling with the member and the member decides to reschedule: Resolve the “Confirm member willingness” task and send the scheduling card to the member.

22.12.3 In-App Visit Workflow (other): Sync visit: no availability, follow up with member

After one task is resolved in the workflow, the system will automatically generate the next task.

1. In-App Visit Workflow (other): Sync visit: Notify member of appointment cancellation
2. In-App Visit Workflow (other): Sync visit: appointment canceled, follow up with member
3. **In-App Visit Workflow (other): Sync visit: no availability, follow up with member**

4. In-App Visit Workflow (other): Review survey- In App Video Visit Survey (auto)
5. In-App Visit Workflow (other): Follow-up with member concerning appointment unwillingness

3) In-App Visit Workflow (other): Sync visit: no availability, follow up with member

Task Description	Sync visit: no availability, follow up with member
Task Priority	5
How Task is Generated	Member tried to schedule MD Referral visit appointment in-app, but no appointments available
How Task is Resolved	Manual
Recommended Steps	Clinic

22.12.4 In-App Visit Workflow (other): Review survey- In App Video Visit Survey (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. In-App Visit Workflow (other): Sync visit: Notify member of appointment cancellation
2. In-App Visit Workflow (other): Sync visit: appointment canceled, follow up with member
3. In-App Visit Workflow (other): Sync visit: no availability, follow up with member
4. **In-App Visit Workflow (other): Review survey- In App Video Visit Survey (auto)**
5. In-App Visit Workflow (other): Follow-up with member concerning appointment unwillingness

4) In-App Visit Workflow (other): Review survey- In App Video Visit Survey (auto)

Task Description	Review survey- In App Video Visit Survey (auto)
Task Priority	9
How Task is Generated	Triggered if the member completes the in app video visit survey after their visit with the doctor
How Task is Resolved	Manual
Recommended Steps	Go to the Reports section to review their responses and then resolve this task.

22.12.5 In-App Visit Workflow (other): Follow-up with member concerning appointment unwillingness

After one task is resolved in the workflow, the system will automatically generate the next task.

1. In-App Visit Workflow (other): Sync visit: Notify member of appointment cancellation
2. In-App Visit Workflow (other): Sync visit: appointment canceled, follow up with member
3. In-App Visit Workflow (other): Sync visit: no availability, follow up with member
4. In-App Visit Workflow (other): Review survey- In App Video Visit Survey (auto)
5. **In-App Visit Workflow (other): Follow-up with member concerning appointment unwillingness**

5) In-App Visit Workflow (other): Follow-up with member concerning appointment unwillingness

Task Description	Follow-up with member concerning appointment unwillingness
Task Priority	4
How Task is Generated	If member opts out of MD Referral in the app this task is triggered (+in app opt-out survey is triggered for the member; results will show up under Events)
How Task is Resolved	Manual
Recommended Steps	Follow up with member to learn more about opt out reason and clarify anything needed for member.

22.13 Merck Survey Tasks

22.13.1 Merck Survey: Review financial burden

Task Priority	5
How Task is Generated	This task is triggered when the total score is 2. This score will always be tied to financial burden.
How Task is Resolved	Manual
Recommended Steps	Clinic

22.13.2 Merck Survey: Review nonadherence likelihood

Task Priority	5
How Task is Generated	This task is triggered when the total score is >2. This task can be related to adherence alone or financial and adherence issues. Members that trigger the “Review nonadherence likelihood” could follow both Merck task workflows.
How Task is Resolved	Manual
Recommended Steps	Clinic

22.14 Surescripts Tasks

22.14.1 New medication needs confirmation

Task Description	The member received a new medication 7 days ago; ask the member to confirm it in the app.
Task Priority	5
How Task is Generated	This task is triggered when a member has an unconfirmed imported medication that's older than a week.
How Task is Resolved	Manual
Recommended Steps	This task means that the member has opted into Surescripts on the home page of the app but they have not done the second step which is to confirm their medications. Remind the member to go to the home page to confirm medications. If there is no data from Surescripts, the member can manually update medication in Settings > Medications.

22.14.2 Review changes to medication list

Task Description	If user is on insulin, set insulin warning. User has changed medication list.
Task Priority	7

How Task is Generated	This task will trigger when the member confirms their medication list or makes changes to their medication list, To view changes, go to the Events tab.
How Task is Resolved	Manual
Recommended Steps	If the medication list shows insulin, enable Insulin Warning. If the medication list shows sulfonylurea, make sure the sulfonylurea flag is enabled with ‘yes’ in the console.

22.15 Care Team In-App Video Workflow

22.15.1 Care Team In-App Video Workflow: Care team visit: message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **Care Team In-App Video Workflow: Care team visit: message member to update app**
2. Care Team In-App Video Workflow: Care team visit: confirm app version
3. Care Team In-App Video Workflow: Care team visit: schedule appointment
4. Care Team In-App Video Workflow: Care team visit: start video visit
5. Care Team In-App Video Workflow: Care team visit: end video visits
6. Care Team In-App Video Workflow: Care team visit: follow up with member concerning appointment cancellation

1) Care Team In-App Video Workflow: Care team visit: message member to update app

Task Priority	5
How Task is Generated	Part of Engagement: Care Team: In-App Video Visit Workflow
How Task is Resolved	If the member's app is up to date - it will resolve automatically; if not - CL should remind member to update the app and then resolve the task manually.
Recommended Steps	If this task is not automatically resolved, check app version (under Member Profile). Message member to update the app.

22.15.2 Care Team In-App Video Workflow: Care team visit: confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. Care Team In-App Video Workflow: Care team visit: message member to update app
2. **Care Team In-App Video Workflow: Care team visit: confirm app version**

3. Care Team In-App Video Workflow: Care team visit: schedule appointment
4. Care Team In-App Video Workflow: Care team visit: start video visit
5. Care Team In-App Video Workflow: Care team visit: end video visits
6. Care Team In-App Video Workflow: Care team visit: follow up with member concerning appointment cancellation

2) Care Team In-App Video Workflow: Care team visit: confirm app version

Task Priority	8
How Task is Generated	Part of Engagement: Care Team: In-App Video Visit Workflow
How Task is Resolved	Automatic

22.15.3 Care Team In-App Video Workflow: Care team visit: schedule appointment

After one task is resolved in the workflow, the system will automatically generate the next task.

1. Care Team In-App Video Workflow: Care team visit: message member to update app
2. Care Team In-App Video Workflow: Care team visit: confirm app version
3. **Care Team In-App Video Workflow: Care team visit: schedule appointment**
4. Care Team In-App Video Workflow: Care team visit: start video visit
5. Care Team In-App Video Workflow: Care team visit: end video visits
6. Care Team In-App Video Workflow: Care team visit: follow up with member concerning appointment cancellation

3) Care Team In-App Video Workflow: Care team visit: schedule appointment

Task Priority	8
How Task is Generated	Part of Engagement: Care Team: In-App Video Visit Workflow
How Task is Resolved	Manual
Recommended Steps	Click “resolve” on “Care team visit: schedule appointment” task to bring up a pop up window to schedule the visit. Enter the desired date/ time of the appointment. The system will send a sign in message to the member 10 minutes prior to the appointment time. It will then ask you to select the primary reason for the visit from this drop down menu.

	Saving the appointment time schedules the appointment in the member's app at the specified time under "Video Visits" and adds the appointment to the "Provider Visits" section of the console.

22.15.4 Care Team In-App Video Workflow: Care team visit: start video visit

After one task is resolved in the workflow, the system will automatically generate the next task.

1. Care Team In-App Video Workflow: Care team visit: message member to update app
2. Care Team In-App Video Workflow: Care team visit: confirm app version
3. Care Team In-App Video Workflow: Care team visit: schedule appointment
4. **Care Team In-App Video Workflow: Care team visit: start video visit**
5. Care Team In-App Video Workflow: Care team visit: end video visits
6. Care Team In-App Video Workflow: Care team visit: follow up with member concerning appointment cancellation

4) Care Team In-App Video Workflow: Care team visit: start video visit

Task Description	Member has a scheduled care team visit on Day, Month 2, 2022. Work with them to prepare them for a successful visit.
Task Priority	5
How Task is Generated	Part of Engagement: Care Team: In-App Video Visit Workflow
How Task is Resolved	Manual: Clicking the "Start Visit" button automatically resolves the task.
Recommended Steps	For Care Team to start visit: Once the member signs in for the visit, a START VISIT button will appear on the upper right hand corner of the console screen under video visit. When the care team member clicks on the START VISIT button the video will turn on and they will be automatically connected with the member. The description of the task includes the time of the video visit.

22.15.5 Care Team In-App Video Workflow: Care team visit: end video visits

After one task is resolved in the workflow, the system will automatically generate the next task.

1. Care Team In-App Video Workflow: Care team visit: message member to update app
2. Care Team In-App Video Workflow: Care team visit: confirm app version
3. Care Team In-App Video Workflow: Care team visit: schedule appointment
4. Care Team In-App Video Workflow: Care team visit: start video visit
5. **Care Team In-App Video Workflow: Care team visit: end video visits**
6. Care Team In-App Video Workflow: Care team visit: follow up with member concerning appointment cancellation

5) Care Team In-App Video Workflow: Care team visit: end video visits

Task Priority	5
How Task is Generated	Part of Engagement: Care Team: In-App Video Visit Workflow
How Task is Resolved	Manual

22.15.6 Care Team In-App Video Workflow: Care team visit: follow up with member concerning appointment cancellation

After one task is resolved in the workflow, the system will automatically generate the next task.

1. Care Team In-App Video Workflow: Care team visit: message member to update app
2. Care Team In-App Video Workflow: Care team visit: confirm app version
3. Care Team In-App Video Workflow: Care team visit: schedule appointment
4. Care Team In-App Video Workflow: Care team visit: start video visit
5. Care Team In-App Video Workflow: Care team visit: end video visits
6. **Care Team In-App Video Workflow: Care team visit: follow up with member concerning appointment cancellation**

6) Care Team In-App Video Workflow: Care team visit: follow up with member concerning appointment cancellation

Task Priority	5
How Task is Generated	Task is triggered if the member cancels the appointment and the workflow get automatically canceled
How Task is Resolved	Manual
Recommended Steps	Message member to follow up on reason for canceling.

22.16 Other Tasks

22.16.1 BGM not set up, contact member

Task Description	3 days since the member should have received the Telcare meter.
Task Priority	5
How Task is Generated	This indicates that it has been three days since the member should have received the Telcare meter and they have not paired it to the app yet.
How Task is Resolved	Manual: Telcare is verified.
Recommended Steps	Confirm with the member that they have received their device and document in DMI.

22.16.2 Care gap identified

Task Priority	6
How Task is Generated	Care Lead Manager will add it manually based on the specific care gap, with instructions about the associated strategy/activity pack.
How Task is Resolved	Manual

22.16.3 Check in with member

Task Description	You have not messaged this user in 7 days. Check in with them if appropriate.
Task Priority	9
How Task is Generated	This task is automatically triggered when you haven't checked in with a member in 7 days.
How Task is Resolved	Once you message the member, this task will auto resolve.

22.16.4 Check in with member: trending disengagement

Task Description	Member has not engaged with the app in the last 3 weeks, despite a history of engagement over the last 2 months. Consider checking in with member to re-engage them.
Task Priority	5

How Task is Generated	Low Program Only: This task is triggered when when a member has not engaged with the app in the last 3 weeks, but has a history of engagement over the last 2 months.
How Task is Resolved	Manual

22.16.5 Coach defined

Task Priority	3-10
How Task is Generated	Manual
How Task is Resolved	Manual

22.16.6 Escalation: Glycemia

Task Priority	3
How Task is Generated	This task is manually triggered when the care team manually creates a coach-defined task to manage glycemic escalations for a user.
How Task is Resolved	Manual
Recommended Steps	This task is available to use for any manual glycemia escalations.

22.16.7 Greet reassigned member

Task Description	Greet and follow up with member that has been reassigned to you.
Task Priority	9
How Task is Generated	This task is triggered when a member is individually reassigned.
How Task is Resolved	Manual, or when Care Lead messages the member.

22.16.8 Greet new member

Task Description	A welcome message has already been sent, if you have one configured. Follow up with the member to begin onboarding tasks.
Task Priority	3
How Task is Generated	Member logs in to the app for the first time. A welcome message has already been sent automatically.
How Task is Resolved	Manual, or when Care Lead messages the member.

22.16.9 Greet member as new point of contact

Task Description	Greet member for whom you recently became the point of contact.
Task Priority	9
How Task is Generated	This task is triggered when a member is individually reassigned.
How Task is Resolved	Manual, or when POC messages the member.

22.16.10 Happy birthday

Task Description	Wish member Happy Birthday!
Task Priority	9
How Task is Generated	It is the member's birthday.
How Task is Resolved	Manual
Recommended Steps	Send a Happy Birthday message to your member.

22.16.11 Member anniversary

Task Description	Member is approaching Onduo anniversary
Task Priority	9
How Task is Generated	Manual
How Task is Resolved	Manual

22.16.12 Member has an upcoming provider visit

Task Description	Member has a scheduled provider visit on Day, Month #, 20XY. Work with them to prepare them for a successful visit.
Task Priority	8
How Task is Generated	Triggered 14 days before a Provider Visit
How Task is Resolved	Manual
Recommended Steps	Provide the member instructions for how to generate a provider report in the Onduo app.

22.16.13 No provider appointment, follow up

Task Description	Member reports no scheduled Provider visit. Follow up to help them get connected with their Provider.
Task Priority	8
How Task is Generated	The member responded to the PCP Visit Card in-app, no PCP visit scheduled.
How Task is Resolved	Manual
Recommended Steps	Follow up with the member and encourage regular visits with PCP.

22.16.14 Respond to message

Task Description	Task will resolve when you send a message.
Task Priority	3
How Task is Generated	A member sends a message (photo or text) to a coach. Only one new message task will exist at a time for each member.
How Task is Resolved	Manual: Respond to message.

22.16.15 Review Clinical Note

Task Description	Someone on the Care Team added or edited a clinical note to the console. Please review.
Task Priority	5
How Task is Generated	This task is generated when someone on the Care Team added or edited a clinical note (Review/ Consult: MD/ CDE label) OR the Care Lead tagged in a clinical note.
How Task is Resolved	Manual
Recommended Steps	This task is to notify you that someone from the clinical team has left a note for that member. Once you review the note, you can manually resolve this task.

22.16.16 Review exercise log

Task Description	Task will resolve when you've commented on the log.
Task Priority	7

How Task is Generated	Member logs exercise.
How Task is Resolved	Manual or log comment sent
Recommended Steps	Click the drop down on the task to see the date the member logged it or review by hovering over the triangle symbol where the member logged it. Follow up with the member if appropriate.

22.16.17 Review food log

Task Description	Task will resolve when you've commented on the log.
Task Priority	10
How Task is Generated	Member uploaded a new meal log. Only one task will exist at a time for each member.
How Task is Resolved	Manual or Automatically resolved when you send a comment on a food log back to the member
Recommended Steps	Comment on a food log, if appropriate

22.16.18 Review member's Support Tier stratification: member flagged for high program level

Task Description	Review member's Support Tier stratification: member flagged for low Support Tier
Task Priority	7
How Task is Generated	If the patient's new computed Support Tier differs from the existing one. This can be triggered by new information coming into the system such as a new A1c value, followup survey or care lead updates in the console. The update to Support Tier used to happen automatically, but as of adding low Support Tier, a task is generated instead.
How Task is Resolved	Manual
Recommended Steps	Change the member’s support tier to High. New Console → Support Tier → Edit → Support Tier: High → Reason: Clinical need determines proactive coach is required and clinical intervention are required → Save

22.16.19 Review member's Support Tier stratification: moderate program level

Task Description	Review member's Support Tier stratification: member flagged for moderate Support Tier

Task Priority	7
How Task is Generated	Triggered if the member’s new computed program level differs than the existing one. This can be triggered by new information coming into the system, such as a new A1c value, follow up survey, or care lead updates in the console.
How Task is Resolved	Manual
Recommended Steps	Change the member’s support tier to Moderate. New Console ➝ Support Tier ➝ Edit ➝ Support Tier: Moderate/High ➝ Reason: Clinical need determines proactive coach is required and clinical intervention are required ➝ Save

22.16.20 Review member's Support Tier stratification: low program level

Task Description	Review member's Support Tier stratification: member flagged for high Support Tier
Task Priority	7
How Task is Generated	Triggered if the member’s new computed program level differs than the existing one. This can be triggered by new information coming into the system such as a new A1c value, follow up survey or care lead updates in the console.
How Task is Resolved	Manual
Recommended Steps	Change the member’s support tier to Low. New Console ➝ Support Tier ➝ Edit ➝ Support Tier: low➝ Reason: Member at clinical target for all conditions ➝ Save

22.16.21 Review member language change

Task Description	Discuss with the member whether to assign a new care lead.
Task Priority	3
How Task is Generated	Triggered when the member changes the language settings in their device.
How Task is Resolved	Manual
Recommended Steps	Consider transferring the member to a multilingual Care Lead.

22.16.22 Review mood log

Task Description	Member has logged a mood. Follow up with the member to better understand why they are feeling that way.
Task Priority	10
How Task is Generated	Member logs mood
How Task is Resolved	Manual
Recommended Steps	Click the drop down on the task to see the date the member logged it or review by hovering over the symbol where the member logged it. Follow up with the member on how they are feeling if you feel appropriate.

22.16.23 Review new encounter summary

Task Description	Review new encounter summary
Task Priority	4
How Task is Generated	Encounter summary is not associated with an active CGM or Med Opt workflow was received.
How Task is Resolved	Manual
Recommended Steps	Go to the Reports tab to view the encounter summary.

22.16.24 Review changes to enrolled conditions

Task Description	Member's enrolled conditions changed; consider adjusting the care plan
Task Priority	5
How Task is Generated	Triggered when the member's enrolled conditions change.
How Task is Resolved	Manual
Recommended Steps	Member's enrolled conditions changed; consider adjusting the care plan. New mode (BGM, BP or Depression) mode will be enabled and set as on hold under health conditions.

22.16.25 Review note

Task Description	Someone on the Care Team added note to the console. Please review.

Task Priority	9
How Task is Generated	Note input from anyone except assigned coach OR care lead tagged in the note.
How Task is Resolved	Manual
Recommended Steps	If a Care team member leaves a note for a member of the team that is not the POC, reassign to the team member that needs to take action.

22.16.26 Review relaxed target range

Task Description	Member relaxed Time in Range Goal. Check timeline for details.
Task Priority	6
How Task is Generated	Member relaxes target range.
How Task is Resolved	Manual
Recommended Steps	Members are able to adjust their target ranges in the app under Settings. This task is to notify you that a member adjusted it. Follow up with the member on this.

22.16.27 Review tightened target range

Task Description	Member tightened Time in Range Goal. Check timeline for details.
Task Priority	6
How Task is Generated	Member tightens target range.
How Task is Resolved	Manual
Recommended Steps	Members are able to adjust their target ranges in the app under Settings. This task is to notify you that a member adjusted it. Follow up with the member on this.

22.16.28 Review step goal

Task Description	Member changed Step Goal. Check timeline for details.
Task Priority	8
How Task is Generated	Any time patient changes step goal

How Task is Resolved	Manual
Recommended Steps	Members are able to adjust their target ranges in the app under Settings. This task is to notify you that a member adjusted it. Follow up with the member on this.

22.16.29 Review survey — Follow-up

Task Description	Review survey completed on: Day, Month DD, YYYY
Task Priority	9
How Task is Generated	Member has completed a survey
How Task is Resolved	Manual
Recommended Steps	Navigate to Reports section. You will see new Follow-up survey available. Review survey and make updates to Care Plan accordingly. Discuss progress with member.

22.16.30 Schedule phone call

Task Description	n/a
Task Priority	10
How Task is Generated	Flagged as high risk in-app Onboarding
How Task is Resolved	Manual
Recommended Steps	Care Lead decides whether or not scheduling an initial phone call is necessary.

22.17 T2D Clinical Triggers

22.17.1 Review hyperglycemia: BG > 400

Task Description	Glucose level greater than 400 mg/dL observed. Follow the coaching protocol.
Task Priority	3

How Task is Generated	CGM or BG log of blood glucose greater than 400 mg/dl. Only one of these at a time for each member.
How Task is Resolved	Manual
Recommended Steps	Check-in about high readings

22.17.2 Review glycemic trend: Average BGM > 170

Task Description	The member's current A1C is < 7%, but their 14-day average BG is trending high (BGM > 170). Follow the coaching protocol.
Task Priority	5
How Task is Generated	Triggered when the patient has a last A1C < 7% in the past 90 calendar days) AND ((average BGM >170 in past 14 calendar days with a minimum of 3 readings on 3 distinct calendar days within a period of 12 AM-11:59 PM) AND there is not already a 'Review glycemic trend: Average BGM > 170' triggered or resolved in the past 7 calendar days
How Task is Resolved	Manual
Recommended Steps	Follow up with the member about numbers trending up

22.17.3 Review glycemic trend: Average BGM > 190

Task Description	The member's current A1C is 7%-8%, but their 14-day average BG is trending higher (BGM > 190). Follow the coaching protocol.
Task Priority	4
How Task is Generated	Triggered when the patient has a last A1C >= 7.0% AND < 8.0% in the past 90 calendar days, AND ((average BGM >190 in past 14 calendar days with a minimum of 3 readings on 3 distinct calendar days within a period of 12 AM-11:59 PM) AND there is not already a 'Review glycemic trend: Average BGM > 190' triggered or resolved in the past 7 calendar days
How Task is Resolved	Manual
Recommended Steps	Follow up with the member about numbers trending up

22.17.4 Review glycemic trend: Average BGM > 220

Task Description	The member's current A1C is 8%-9%, but their 14-day average BGM is trending higher (BGM > 220). Follow the coaching protocol.

Task Priority	4
How Task is Generated	Triggered when the patient has a last A1C is >= 8.0% AND < 9.0% in past 90 calendar days AND ((average BGM >220 in past 14 calendar days with a minimum of 3 readings on 3 distinct calendar days within a period of 12 AM-11:59 PM) AND there is not already a ‘Review glycemic trend: Average BGM > 220’ triggered or resolved in the past 7 calendar days
How Task is Resolved	Manual
Recommended Steps	Follow up with the member about numbers trending up

22.17.5 Review glycemic trend: Average BGM > 170 and no A1C

Task Description	The member’s current A1C is unknown and their 14-day average BGM is trending high (BGM > 170). Follow the coaching protocol.
Task Priority	4
How Task is Generated	Triggered when the patient has no A1C in the past 90 calendar days AND ((average BGM >170 in past 14 calendar days with a minimum of 3 readings on 3 distinct calendar days within a period of 12 AM-11:59 PM) AND there is not already a ‘Review glycemic trend: average BGM > 170 and no A1C’, ‘Review glycemic trend: Average BGM > 220', ‘Review glycemic trend: Average BGM > 190', or ‘Review glycemic trend: Average BGM > 170' triggered or resolved in the past 7 calendar days
How Task is Resolved	Manual
Recommended Steps	First trigger: Follow up with the member and resolve task when complete. Obtain a new A1C. Encourage BG checking. Check in on goals. Second trigger or more: continue to follow up to obtain A1C and check in on goals then resolve the task.

22.17.6 Review glycemic trend: CGM > 180

Task Description	The member has CGM readings > 180 for > 25% of the 24-hour day over the last 3 days, which falls outside the ADA standards of care. Follow the coaching protocol.

Task Priority	3
How Task is Generated	Triggered when member has CGM readings > 180 for > 25% of the day (> 6 hour in 24 hour period) over the last 72 hours with active overall CGM data AND there is not already a 'Review glycemic trend: CGM > 180' or 'Review glycemic trend: CGM > 250' triggered or resolved in the past 7 calendar days
How Task is Resolved	Manual
Recommended Steps	First trigger: Follow up with the member and resolve task when complete. Obtain a new A1C. Encourage BG checking. Check in on goals. Second trigger or more: continue to follow up to obtain A1C and check in on goals then resolve the task.

22.17.7 Review glycemic trend: CGM > 250

Task Description	The member has CGM readings > 250 for >5% of the 24-hour day over the last 3 days, which falls outside the ADA standards of care. Follow the coaching protocol.
Task Priority	3
How Task is Generated	Triggered when member has CGM readings > 250 for > 5% of the day (>1 hour 12 mins in 24 hour period) over the last 72 hours with active overall CGM data AND there is not already a 'Review glycemic trend: CGM > 250 triggered or resolved in the past 7 calendar days
How Task is Resolved	Manual
Recommended Steps	The member has CGM readings > 250 for >5% of the 24-hour day over the last 3 days, which falls outside the ADA standards of care. Follow the coaching protocol.

22.17.8 A1C ≥ 9%

Task Description	The member has an A1C ≥ 9%. Follow the coaching protocol.
Task Priority	3

How Task is Generated	Triggered when a member has an A1C of ≥ 9% that is verified through a HbA1c home test kit, verified by the Care Team or verified by a health plan, AND this specific instance / reported value has not triggered yet AND it is a one-time only task that should trigger for each instance of a member's reported A1C value AND there is not already a 'A1C ≥ 9%' triggered or resolved in the past 7 calendar days
How Task is Resolved	Manual
Recommended Steps	Message member to check in about high A1C

22.17.9 Hypo BGM < 70

Task Description	This member has 2 BGM readings < 70 mg/dL in the last 7 days and the member is on sulfonylurea, insulin or meglitinides. The member is part of the T1D and/or T2D program. Follow the coaching protocol.
Task Priority	1
How Task is Generated	Triggered when a member has 2 BGM readings < 70 mg/dL in the last 7 days and is on sulfonylurea, insulin or meglitinides.
How Task is Resolved	Manual
Recommended Steps	Check in with the member; the member can learn what might have caused hypos to avoid in the future. Share Rule of 15/ hypoglycemia education.

22.17.10 Hypo CGM < 70 for > 4% of day

Task Description	This member had a CGM < 70 mg/dL for > 4% of the last 24 hours, and is on sulfonylurea, insulin or meglitinides. Follow the coaching protocol.
Task Priority	1
How Task is Generated	Triggered when a member has CGM < 70 mg/dL for > 4% of the last 24 hours of overall active CGM data, AND the member is on sulfonylurea or insulin or meglitinides (verified by Surescripts data)
How Task is Resolved	Manual
Recommended Steps	Safety check in (provide education on hypo treatment,etc).

	Share Rule of 15/ hypoglycemia education.

22.17.11 Hypo BGM/CGM < 54

Task Description	This member had a BGM/CGM < 54 mg/dL in the past 24 hour period, and is on sulfonylurea, insulin or meglitinides. Follow the coaching protocol.
Task Priority	1
How Task is Generated	Triggered when a member has had 1 or more [BGM < 54 mg/dL in the last 24 hours] OR [CGM < 54 mg/dL of overall active CGM data in the last 24 hours] , AND is on sulfonylurea, insulin or meglitinides
How Task is Resolved	Manual
Recommended Steps	Safety check in (provide education on hypo treatment,etc). Share Rule of 15/ hypoglycemia education.

22.17.12 Hypo CGM < 54 for 1% of day

Task Description	This member had a CGM < 54 mg/dL for > 1% of the day (>14 minutes in the last 24 hours) and is on sulfonylurea, insulin or meglitinides. Follow the coaching protocol.
Task Priority	1
How Task is Generated	Triggered when a member has [CGM < 54 mg/dL for > 1% of the day (>14 minutes in 24 hour period of active overall CGM data)], AND is on sulfonylurea, insulin or meglitinides
How Task is Resolved	Manual
Recommended Steps	Safety check in (provide education on hypo treatment,etc). Share Rule of 15/ hypoglycemia education.

22.18 Checkpoint Tasks

22.18.1 BP Checkpoint: Follow up with member on results of checkpoint

Task Priority	6

How Task is Generated	This task is triggered when the member completes a BP checkpoint or it expires. Note: These are ‘checkpoints’ in the new console such as a BP check in survey, Diabetes check in survey, or PHQ-9 checkpoint
How Task is Resolved	Manual (has to be completed in V2)
Recommended Steps	If the member did not complete the check-in survey/ checkpoint, follow up with the member about trying the survey again and resend once.

22.18.2 BP Checkpoint: Ask member about canceled BP checkpoint

Task Priority	6
How Task is Generated	This task is triggered when a member opts out of the BP checkpoint. Note: These are ‘checkpoints’ in the new console such as a BP check in survey or a Diabetes check in survey.
How Task is Resolved	Manual (has to be completed in V2)
Recommended Steps	Follow up with the member regarding the canceled checkpoint.

22.19 Hypertension Tasks & Strategies

22.19.1 Strategy: What is high blood pressure (7 days)

How Strategy is Generated	System initiated in app video: What is Blood Pressure
How Task is Resolved	Manual
Recommended Steps	Encourage Member to watch in-app video

22.19.2 Strategy: BP Blood Pressure Program (30 days)

How Strategy is Generated	Coach initiated (optional)
How Task is Resolved	Manual

Recommended Steps	Optional: Add this strategy when you switch BP Health Status to Primary focus under Health Status.

22.19.3 BP monitor pairing: Remind member to set up BP monitor

Task Description	7 days since the BP monitor was shipped. Consider checking in with member.
Task Priority	5
How Task is Generated	Task is triggered if the member has not paired BP monitor w/in 7 days.
How Task is Regenerated	Task will re-trigger if the coach resolves this task and the user still doesn't pair their BP monitor within 5 days.
How Task is Resolved	Manual
Recommended Steps	Message member reminding them to pair monitor.

22.19.4 Strategy: Home BP Monitoring Technique

How Task is Generated	System initiated: The system automatically adds the BP: Home BP Monitoring Technique strategy when: The member pairs their BP monitor AND the member has not previously completed the BP technique strategy
Recommended Steps	Encourage member to watch 'How to take accurate blood pressure readings at home' video (should be visible on the Home Screen in the app)

22.19.5 BP monitor pairing: Remind member to take initial BP reading

Task Description	No initial blood pressure data received within 3 days after setting up blood pressure monitor. Encourage member to take their first BP reading.
Task Priority	5
How Task is Generated	Triggered if the member pairs their BP monitor AND the member has not taken a BP reading within 3 days of pairing their BP monitor

How Task is Resolved	Manual
Recommended Steps	Message the member to encourage them to start checking their BP

22.19.6 Strategy: Offer to Start BP Checkpoint

How Task is Generated	The system automatically adds the BP: Offer to start BP checkpoint strategy when: The member pairs their BP monitor AND the member has not previously started a BP checkpoint AND the member does not currently have the BP: Offer to start BP checkpoint The system allows a BP checkpoint to be manually added when the member has HTN as an enrolled condition

22.19.7 BP Checkpoint: Remind member to schedule BP checkpoint

Task Description	Member has not responded to the BP Checkpoint dashboard card in 3 days. Consider checking in with member.
Task Priority	7
How Task is Generated	Triggered if member has not responded to the BP Checkpoint scheduling card in 3 days AND and the BP: Offer to start BP checkpoint strategy is still active.
How Task is Regenerated	Task will re-trigger after 3 days if the user doesn't respond (the prompt expires).
How Task is Resolved	Manual
Recommended Steps	Message member to remind them to schedule a BP checkpoint

22.19.8 BP Checkpoint: Follow up with member and re-send BP Checkpoint

Task Priority	8
How Task is Generated	Strategy: Offer to Start BP Checkpoint expired

How Task is Resolved	Manual
Recommended Steps	Follow up with member and re-send BP checkpoint:

22.19.9 Strategy: BP checkpoint: In progress

How Task is Generated	Strategy/ Auto-initiated (only) Checkpoint has been scheduled, still within 7 day window, has not been completed
Recommended Steps	A ‘Report’ is auto-generated when a user hits “schedule” and has successfully started the checkpoint

22.19.10 Coach Defined: BP Checkpoint in Progress

Task Priority	8
How Task is Generated	Optional task that can be manually added by CL once Strategy: BP Checkpoint in Progress is initiated to keep track of members in the middle of a checkpoint
How Task is Resolved	Manual
Recommended Steps	Reschedule for every 2 days to help ensure checkpoint is successfully completed

22.19.11 BP checkpoint: Remind member to take BP for checkpoint

Task Description	Member has not taken a BP reading in 3 days during the checkpoint. Consider checking in with member.
Task Priority	8
How Task is Generated	Member has not taken a BP reading in 3 days during the checkpoint AND the BP Checkpoint in Progress Strategy is still active
How Task is Resolved	Manual
Recommended Steps	Remind member to take BP for Checkpoint

22.19.12 BP checkpoint: Follow up with member on incomplete BP checkpoint

Task Priority	7
How Task is Generated	BP checkpoint is finished and incomplete
How Task is Resolved	Manual
Recommended Steps	Review incomplete report and follow up with member:

22.19.13 Ask member about canceled BP checkpoint

Task Priority	6
How Task is Generated	Triggered when member opts out of the checkpoint
How Task is Resolved	Manual
Recommended Steps	Check in with the member following the checkpoint.

22.19.14 BP checkpoint: Follow up with member on completed BP checkpoint

Task Priority	6
How Task is Generated	Triggered when member completes BP checkpoint
How Task is Resolved	Manual
Recommended Steps	Review report in the console. Schedule future checkpoints reminders (coach define task)

22.19.15 Consider moving member to HTN high condition severity

Task Description	Member took 3+ BP readings in the last 30 days, and the BP average is >= 130/80. Consider updating the blood pressure flag and moving member to high blood pressure condition severity
Task Priority	7
How Task is Generated	Triggered If a member has HTN condition severity = moderate or unknown (regardless of focus condition), has 2+ BP readings in the last 30 days where the 30-day BP

	average is >= 130/80, and the task is not currently open and has not been resolved within the last 7 days
How Task is Resolved	Manual
Recommended Steps	[and indicate if there is a pop-up notification]

22.19.16 Send Blood Pressure Check-in Survey

Task Description	It's been 6 months since the last Blood Pressure check-in survey: consider sending the Blood Pressure check-in survey.
Task Priority	5
How Task is Generated	If (Member has been HTN low Support Tier continuously for 6 months) AND (Member has not completed BP check-in survey within the last 6 months) AND (The last "Send BP check-in survey" coach task has not been resolved within the last 3 months), trigger the coach task.
How Task is Resolved	Manual
Recommended Steps	Under Manage Program' → select the '+' sign next to the Blood Pressure Check-in survey → select 'publish' to send to the member

22.20 Hypertension Clinical Triggers

22.20.1 Review BP readings: BP over 130/80

Task Description	The member's BP is trending high and they have had 4 or more BP readings ≥130/80 in the past 14 days. Follow the coaching protocol.
Task Priority	5
How Task is Generated	"Triggered when any reading from today is >= 130/80 and the patient has 4 or more BP readings ≥130/80 in the past 14 days and there is not an existing triggered 'BP over 160/100', 'BP over 150/90', 'BP Over 140/90' or 'BP Over 130/80' task in the past 7 days "

How Task is Regenerated	This task may trigger if criteria is met after 7 days
How Task is Resolved	Manual
Recommended Steps	Review BP check Technique with member. Revisit lifestyle goals and continue to follow up on BP technique if readings are inconsistent MD Ref, if needed.

22.20.2 Review BP readings: BP over 140/90

Task Description	The member's BP is trending high and they have had 3 or more BP readings ≥140/90 in the past 14 days. Follow the coaching protocol.
Task Priority	5
How Task is Generated	Triggered when any reading from today is >= 140/90 and the patient has 3 or more BP readings ≥140/90 in the past 14 days and there is not an existing triggered 'BP over 160/100' or 'BP over 150/90' or 'BP Over 140/90' task in the past 7 days
How Task is Regenerated	This task may trigger if criteria is met after 7 days
How Task is Resolved	Manual
Recommended Steps	Review BP check Technique with member Revisit lifestyle goals and continue to follow up on BP technique if readings are inconsistent MD Ref, if needed

22.20.3 Review BP readings: BP over 150/90

Task Description	The member's BP is trending high and they have had 3 or more BP readings ≥150/90 in the past 14 days. Follow the coaching protocol.

Task Priority	4
How Task is Generated	Triggered when any reading from today is >= 150/90 and the patient has 3 or more BP readings ≥150/90 in the past 14 days and there is not an existing triggered 'BP over 160/100' or 'BP over 150/90' task in the past 7 days
How Task is Regenerated	This task may trigger if criteria is met after 7 days
How Task is Resolved	Manual
Recommended Steps	Review BP check Technique with member Revisit lifestyle goals and continue to follow up on BP technique if readings are inconsistent MD Ref, if needed

22.20.4 Review urgent BP readings high: BP over 160/100

Task Description	The member's BP is trending high and they have had 2 or more BP readings ≥160/100 in the past 7 days. Follow the coaching protocol.
Task Priority	3
How Task is Generated	Triggered when the patient's most recent BP reading is ≥ 160/100 and the patient has 2 or more BP readings ≥ 160/100 in the past 7 days, and there's not already a BP Over 160/100 task triggered in the past 3 days
How Task is Regenerated	This task may trigger if criteria is met after 3 days
How Task is Resolved	Manual
Recommended Steps	Review BP check Technique with member Revisit lifestyle goals and continue to follow up on BP technique if readings are inconsistent MD Ref, if needed

22.21 Hypertension Other Escalations

22.21.1 Review Urgent: BP Reading High

Task Description	Blood pressure greater than or equal to 180/120 mmHg: follow coaching protocol. Related blood pressure readings: <patient-specific data>
Task Priority	2
How Task is Generated	Blood pressure >= 180/120 mmHg
How Task is Resolved	Manual
Recommended Steps	Notification in the APP

22.21.2 Review Urgent: BP Reading Low

Task Priority	4
How Task is Generated	Triggered when hypotension crisis reading is met
How Task is Resolved	Manual
Recommended Steps	Notification in the APP

22.21.3 Review high pulse reading

Task Priority	4
How Task is Generated	High Pulse reading ≥110
How Task is Resolved	Manual
Recommended Steps	Notification in the APP

22.21.4 Review low pulse reading

Task Priority	3
How Task is Generated	Low Pulse Reading <55

How Task is Resolved	Manual
Recommended Steps	Notification in the APP

22.21.5 Escalation: Hypertension

Task Priority	3
How Task is Generated	This task is available to use for any manual hypertension escalations
How Task is Resolved	Manual
Recommended Steps	This task is available to use for any manual hypertension escalations

22.22 Mental and Behavioral Health Tasks

22.22.1 MBH Checkpoint: PHQ-9 Assessment

How Task is Generated	PHQ-9 survey/ checkpoint will be automatically sent to member at the appropriate cadence: If their last PHQ score was less than 20 and score on question #9 = 0, send every 4 weeks from the last date if their last PHQ score was greater than or equal to 20, or score on question #9 > 0, send every 2 weeks from the last date
How Task is Resolved	Automatic

22.22.2 Recurring MBH Member Review

Task Description	Review member's depression score and progress in the program with your licensed mental health clinician.
Task Priority	3
How Task is Generated	For every member that has depression at least in maintenance and an initial phq score less than the threshold, send a case review task alert every 4 weeks for 16 weeks (4x task alerts). If a member with a high initial score no longer has a high score or suicidal ideation we

	follow the pattern for low phq patients(a task alert very 4 weeks for 16 weeks). If the patient has had 3 case reviews at a 4 week cadence the 4th task should ask the care lead to transition the member to the post active phase. There is a separate task(elevated phq 9 task) to handle a member who was initially below the threshold but then scores above the threshold.
How Task is Resolved	Automatic

22.22.3 Recurring MBH Member Review (High Frequency)

Task Description	Review member's depression score and progress in the program with your licensed mental health clinician.
Task Priority	3
How Task is Generated	If a member's initial phq score is greater than or equal to 20 or indicates suicidal ideation we want to send a case review task every 2 weeks until their latest phq score is lower than the threshold.
How Task is Resolved	Automatic

22.23 MBH: In-App Clinical Consult Video Visit with LCSW Workflow

22.23.1 MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)**
2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)

3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)
7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)
8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)
9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)

Task Priority	5
How Task is Generated	Manually triggered for any member that scores PHQ-9 >/10 for the first time will be proactively referred to a Licensed Mental Health Provider for a clinical consultation. The Licensed Mental Health Provider will conduct an MBH Intake, review PHQ-9 score and discuss treatment options for a member to work with an Onduo psychiatrist and/or therapist.
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve
Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile). Message member to update the app

22.23.1.2 MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)
2. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)**
3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)

4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)
7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)
8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)
9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)

Task Priority	8
How Task is Generated	Part of MBH: In-App Clinical Consult Video Visit with LCSW Workflow
How Task is Resolved	Automatic

22.23.1.3 MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)
2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)
3. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)**
4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)
7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)
8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)
9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)

11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)

Task Priority	7
How Task is Generated	Part of MBH: In-App Clinical Consult Video Visit with LCSW Workflow
How Task is Resolved	Manual Has to be resolved manually; willingness challenge does not trigger for MBH In App visit workflows
Recommended Steps	Confirm member willingness for video Clinical Consultation

22.23.4 MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)
2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)
3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)
4. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)**
5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)
7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)
8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)
9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm Eligibility for Onduo PC (auto/ manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Clinical Consult Video Visit with LCSW Workflow
How Task is Resolved	Automatic/ Manual
Recommended Steps	Eligibility task will auto resolve and cancel strategy if no provider is in the member's state of residence If resolved with NO - it will cancel the strategy

22.23.5 MBH: In-App Clinical Consult Video Visit with LCSW Workflow Tasks

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)
2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)
3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)**
6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)
7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)
8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)
9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

Task Priority	5
How Task is Generated	Part of MBH: In-App Clinical Consult Video Visit with LCSW Workflow

How Task is Resolved	Manual/ Automatic Autoresolves with availability of MD in Athena; searches 60 min block (but members will see appointments of 30 min)
Recommended Steps	Clinic

22.23.6 MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)
2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)
3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)**
7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)
8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)
9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)

Task Priority	5
How Task is Generated	Part of MBH: In-App Clinical Consult Video Visit with LCSW Workflow
How Task is Resolved	Manual
Recommended Steps	Resolving this task sends scheduling card The scheduling card will remain active in app until the member schedules or the strategy is canceled

22.23.7 MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)
2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)
3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)
7. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)**
8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)
9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)

Task Priority	5
How Task is Generated	Part of MBH: In-App Clinical Consult Video Visit with LCSW Workflow. Triggered in 3 days if the member has not scheduled an appointment
How Task is Resolved	Manual
Recommended Steps	Encourage member to schedule appointment

22.23.8 MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)
2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)

3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)
7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)
8. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)**
9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)

Task Priority	8
How Task is Generated	Part of MBH: In-App Clinical Consult Video Visit with LCSW Workflow
How Task is Resolved	Automatic (if appointment is scheduled)

22.23.9 MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)
2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)
3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)
7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)
8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)

9. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)**
10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Clinical Consult Video Visit with LCSW Workflow
How Task is Resolved	Manual
Recommended Steps	Members who do not opt out of the reminder in the app will receive automatic reminders about their appointment. Note: Date/ time of the appointment will appear under PROVIDER VISITS Remind member about the appointment

22.23.10 MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)
2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)
3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)
7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)
8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)
9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)
10. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)**
11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Clinical Consult Video Visit with LCSW Workflow
How Task is Resolved	Manual
Recommended Steps	If the info has not been added into the app already: ask who the member's PCP is and add name, address and phone number into the console

22.23.11 MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Message member to update app (auto/manual)
2. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm app version (auto)
3. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send scheduling card (manual)
7. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Check in with member (auto/ manual)
8. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Schedule appointment (auto)
9. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Verify provider information is up to date (manual)
11. **MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)**

11. MBH: In-App Clinical Consult Video Visit with LCSW Workflow: Import encounter summary (auto)

Task Priority	5
How Task is Generated	Part of MBH: In-App Clinical Consult Video Visit with LCSW Workflow

How Task is Resolved	Automatic Resolved automatically once encounter summary is sent to the Console (Reports)
Recommended Steps	Review encounter summary Follow up with member on any specific provider instructions and offer to answer questions

22.24 MBH: In-App Therapy Video Visit Workflow

22.24.1 MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)**
2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)
3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)
7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)
8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)
9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)

Task Priority	5
How Task is Generated	Manually triggered. Members who have been identified to work with a therapist following their clinical consultation will be referred to an Onduo licensed mental health provider for therapy sessions
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve

Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile). Message member to update the app

22.24.2 MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)
2. **MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)**
3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)
7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)
8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)
9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)

Task Priority	8
How Task is Generated	Part of MBH: In-App Therapy Video Visit Workflow
How Task is Resolved	Automatic

22.24.3 MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)
2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)
3. **MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)**
4. MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)
7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)
8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)

9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)

Task Priority	7
How Task is Generated	Part of MBH: In-App Therapy Video Visit Workflow
How Task is Resolved	Manual Has to be resolved manually; willingness challenge does not trigger for MBH In App visit workflows
Recommended Steps	Confirm member willingness for video Clinical Consultation

22.24.4 MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)
2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)
3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)
4. **MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)**
5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)
7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)
8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)
9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

4. MBH: In-App Therapy Video Visit Workflow: Confirm Eligibility for Onduo PC (auto/ manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Therapy Video Visit Workflow
How Task is Resolved	Automatic/ Manual

Recommended Steps	Eligibility task will auto resolve and cancel strategy if no provider is in the member's state of residence If resolved with NO - it will cancel the strategy

22.24.5 MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)
2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)
3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. **MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)**
6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)
7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)
8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)
9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

Task Priority	5
How Task is Generated	Part of MBH: In-App Therapy Video Visit Workflow
How Task is Resolved	Manual/ Automatic Autoresolves with availability of MD in Athena; searches 60 min block (but members will see appointments of 30 min)
Recommended Steps	Clinic

22.24.6 MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)
2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)
3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)

5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. **MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)**
7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)
8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)
9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)

Task Priority	5
How Task is Generated	Part of MBH: In-App Therapy Video Visit Workflow
How Task is Resolved	Manual
Recommended Steps	Resolving this task sends scheduling card The scheduling card will remain active in app until the member schedules or the strategy is canceled

22.24.7 MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)
2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)
3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)
7. **MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)**
8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)
9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)

Task Priority	5
How Task is Generated	Part of MBH: In-App Therapy Video Visit Workflow

	Triggered in 3 days if the member has not scheduled an appointment
How Task is Resolved	Manual
Recommended Steps	Encourage member to schedule appointment

22.24.8 MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)
2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)
3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)
7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)
8. **MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)**
9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)

Task Priority	8
How Task is Generated	Part of MBH: In-App Therapy Video Visit Workflow
How Task is Resolved	Automatic (if appointment is scheduled)

22.24.9 MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)
2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)
3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)

7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)
8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)
9. **MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)**
10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)
11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Therapy Video Visit Workflow
How Task is Resolved	Manual
Recommended Steps	Members who do not opt out of the reminder in the app will receive automatic reminders about their appointment. Note: Date/ time of the appointment will appear under PROVIDER VISITS Remind member about the appointment

22.24.10 MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)
2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)
3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)
7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)
8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)
9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)
10. **MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)**
11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Therapy Video Visit Workflow
How Task is Resolved	Manual
Recommended Steps	If the info has not been added into the app already: ask who the member's PCP is and add name, address and phone number into the console

22.24.11 MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Therapy Video Visit Workflow: Message member to update app (auto/manual)
2. MBH: In-App Therapy Video Visit Workflow: Confirm app version (auto)
3. MBH: In-App Therapy Video Visit Workflow: Confirm member willingness (auto/ manual)
4. MBH: In-App Therapy Video Visit Workflow: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Therapy Video Visit Workflow: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Therapy Video Visit Workflow: Send scheduling card (manual)
7. MBH: In-App Therapy Video Visit Workflow: Check in with member (auto/ manual)
8. MBH: In-App Therapy Video Visit Workflow: Schedule appointment (auto)
9. MBH: In-App Therapy Video Visit Workflow: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Therapy Video Visit Workflow: Verify provider information is up to date (manual)
11. **MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)**

11. MBH: In-App Therapy Video Visit Workflow: Import encounter summary (auto)

Task Priority	5
How Task is Generated	Part of MBH: In-App Therapy Video Visit Workflow
How Task is Resolved	Automatic Resolved automatically once encounter summary is sent to the Console (Reports)
Recommended Steps	Review encounter summary Follow up with member on any specific provider instructions and offer to answer questions

22.25 MBH: In-App Psychiatrist Video Visit Workflow: Initial

22.25.1 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)**
2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)

Task Priority	5
How Task is Generated	Manually triggered Members who have been identified to work with a psychiatrist following their clinical consultation will be referred to the Onduo psychiatrist for further evaluation, assessment, diagnosis and medication management if indicated
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve
Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile). Message member to update the app

22.25.2 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)
2. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)**
3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)

Task Priority	8
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Initial
How Task is Resolved	Automatic

22.25.3 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)
3. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)**
4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)

7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)

Task Priority	7
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Initial
How Task is Resolved	Manual Has to be resolved manually; willingness challenge does not trigger for MBH In App visit workflows
Recommended Steps	Confirm member willingness for video Clinical Consultation

22.25.4 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)
4. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)**
5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm Eligibility for Onduo PC (auto/ manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Initial
How Task is Resolved	Automatic/ Manual
Recommended Steps	Eligibility task will auto resolve and cancel strategy if no provider is in the member's state of residence If resolved with NO - it will cancel the strategy

22.25.5 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)
5. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)**
6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

Task Priority	5
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Initial
How Task is Resolved	Manual/ Automatic Autoresolves with availability of MD in Athena; searches 60 min block (but members will see appointments of 30 min)

Recommended Steps	Clinic

22.25.6 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)**
7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)

Task Priority	5
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Initial
How Task is Resolved	Manual
Recommended Steps	Resolving this task sends scheduling card The scheduling card will remain active in app until the member schedules or the strategy is canceled

22.25.7 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)

2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)
7. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)**
8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)

Task Priority	5
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Initial. Triggered in 3 days if the member has not scheduled an appointment
How Task is Resolved	Manual
Recommended Steps	Encourage member to schedule appointment

22.25.8 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)
8. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)**
9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)

10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)

Task Priority	8
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Initial
How Task is Resolved	Automatic If appointment is scheduled

22.25.9 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)
9. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)**
10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Initial
How Task is Resolved	Manual

Recommended Steps	Members who do not opt out of the reminder in the app will receive automatic reminders about their appointment. Note: Date/ time of the appointment will appear under PROVIDER VISITS Remind member about the appointment

22.25.10 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)
10. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)**
11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Initial
How Task is Resolved	Manual
Recommended Steps	If the info has not been added into the app already: ask who the member's PCP is and add name, address and phone number into the console

22.25.11 MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send scheduling card (manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Verify provider information is up to date (manual)
11. **MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)**

11. MBH: In-App Psychiatrist Video Visit Workflow: Initial: Import encounter summary (auto)

Task Priority	5
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Initial
How Task is Resolved	Automatic Resolves automatically once encounter summary is sent to the Console (Reports)
Recommended Steps	Review encounter summary Follow up with member on any specific provider instructions and offer to answer questions

22.26 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up

22.26.1 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)**
2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)

Task Priority	5
How Task is Generated	Manually triggered Members who have been identified to work with a psychiatrist following their clinical consultation will be referred to the Onduo psychiatrist for further evaluation, assessment, diagnosis and medication management if indicated
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve

Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile). Message member to update the app

22.26.2 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
2. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)**
3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)
4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)
6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)
9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)
12. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)

Task Priority	8
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Follow-up
How Task is Resolved	Automatic

22.26.3 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)

2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
3. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)**
4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)
6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)
9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)
12. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)

Task Priority	7
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Follow-up
How Task is Resolved	Manual Has to be resolved manually; willingness challenge does not trigger for MBH In App visit workflows
Recommended Steps	Confirm member willingness for video Clinical Consultation

22.26.4 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)
4. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)**

5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)
6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)
9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)
12. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm Eligibility for Onduo PC (auto/ manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Follow-up
How Task is Resolved	Automatic/ Manual
Recommended Steps	Eligibility task will auto resolve and cancel strategy if no provider is in the member's state of residence If resolved with NO - it will cancel the strategy

22.26.5 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)
4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)
5. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)**
6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)

9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)
12. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

Task Priority	5
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Follow-up
How Task is Resolved	Manual/ Automatic Autoresolves with availability of MD in Athena; searches 60 min block (but members will see appointments of 30 min)
Recommended Steps	Clinic

22.26.6 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)
4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)
6. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)**
7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)
9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)

12. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)

Task Priority	5
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Follow-up
How Task is Resolved	Manual
Recommended Steps	Resolving this task sends scheduling card The scheduling card will remain active in app until the member schedules or the strategy is canceled

22.26.7 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)
4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)
6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
7. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)**
8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)
9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)
12. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)

Task Priority	5

How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Follow-up Triggered in 3 days if the member has not scheduled an appointment
How Task is Resolved	Manual
Recommended Steps	Encourage member to schedule appointment

22.26.8 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)
4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)
6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)
8. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)**
9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)
11. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)
12. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)

Task Priority	8
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Follow-up
How Task is Resolved	Automatic If appointment is scheduled

22.26.9 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

12. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
13. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)
2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)
3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)
6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)
9. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)**
10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Follow-up
How Task is Resolved	Manual
Recommended Steps	Members who do not opt out of the reminder in the app will receive automatic reminders about their appointment. Note: Date/ time of the appointment will appear under PROVIDER VISITS Remind member about the appointment

22.26.10 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)
4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)
5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)
6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)
9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
10. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)**
11. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)
12. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)

Task Priority	8
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Follow-up
How Task is Resolved	Manual
Recommended Steps	If the info has not been added into the app already: ask who the member's PCP is and add name, address and phone number into the console

22.26.11 MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

After one task is resolved in the workflow, the system will automatically generate the next task.

1. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Message member to update app (auto/manual)
2. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm app version (auto)
3. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm member willingness (auto/ manual)
4. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm eligibility for Onduo PC (auto/ manual)

5. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Confirm or create appointment availability (No available appointments could be found for in-app scheduling) (auto)
6. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send scheduling card (manual)
7. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Check in with member (auto/ manual)
8. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Schedule appointment (auto)
9. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Send appointment reminder, confirm medication (manual)
10. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Verify provider information is up to date (manual)
11. **MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)**

11. MBH: In-App Psychiatrist Video Visit Workflow: Follow-up: Import encounter summary (auto)

Task Priority	5
How Task is Generated	Part of MBH: In-App Psychiatrist Video Visit Workflow: Follow-up
How Task is Resolved	Automatic Resolves automatically once encounter summary is sent to the Console (Reports)
Recommended Steps	Review encounter summary Follow up with member on any specific provider instructions and offer to answer questions

22.27 Mental and Behavioral Health Escalations

22.27.1 MBH Telemedicine Task

Task Description	Member has a PHQ-9 >= 10. Send telemedicine flow for clinical consultation to user. Schedule a video visit for the member by manually starting the strategy from the console..
Task Priority	2
How Task is Generated	Triggered when a member completes the PHQ-9(either in onboarding, reassessment or the opt in flow) with a score greater than or equal to 10 and doesn't have an active care visit and has not received this task before for this member.
How Task is Resolved	Manual

Recommended Steps	Initiate Telemed workflow (+MBH Strategy) and select: - LCSW clinical consult - Initial psychiatrist - Follow up psychiatrist - Therapist visits

22.27.2 Member Automatically Referred to MBH Direct Care

Task Description	PHQ-9 requires review and outreach to member by LICSW for clinical consultation.
Task Priority	1
How Task is Generated	Triggered when a member completes the PHQ-9(either in onboarding, reassesment or the opt in flow) with a score greater than or equal to 20 or suicidal ideation. This task has a priority of 1.
How Task is Resolved	Manual
Recommended Steps	Clinic

22.27.3 Member has elevated PHQ-9 score

Task Description	Member has a PHQ-9 >= 10. Follow coaching protocol.
Task Priority	3
How Task is Generated	Triggered when a member completes the PHQ-9(either in onboarding, reassessment or the opt in flow) with a score greater than or equal to 10 and no suicidal ideation.
How Task is Resolved	Manual
Recommended Steps	If MBH in-app visit workflow hasn't been started yet or member hasn't previously declined a visit (see Notes and/or Completed Strategies) - initiate Telemed workflow (+MBH Strategy) and select: - Licensed Mental Health Provider Clinical consult: This will always be the first visit for all members. The Licensed Mental Health Clinician will complete the MBH intake questionnaire, review PHQ-9 scores and recommend a care pathway based on clinical guidelines. The Licensed Mental Health Provider will need to outline the post visit

	instructions, including a referral for therapy and/or psychiatry - Initial psychiatrist - Follow up psychiatrist - Therapist visits

22.27.4 MBH Post active task

Task Description	Transition member to post-active phase and re-evaluate Support Tier care lead assignment.
Task Priority	5
How Task is Generated	If the patient has had 3 case reviews at a 4 week cadence the 4th task should ask the care lead to transition the member to the post active phase. There is a separate task(elevated phq 9 task) to handle a member who was initially below the threshold but then scores above the threshold.
How Task is Resolved	Manual
Recommended Steps	Update health condition status to: On-hold

22.28 OSA Tasks

22.28.1 OSA: Exit Member From the Program

Task Priority	5
How Task is Generated	Triggered if a member is going through the OSA risk assessment workflow and is not opted in.
How Task is Resolved	Manual
Recommended Steps	Member’s condition program status automatically set to ‘disabled’ if member opts-out of the OSA Diagnosis flow OR Member meets exclusion criteria (see survey response under Reports)

22.28.2 OSA: Start Strategy: OSA In-APP Eval/ Diagnostic Video Visit

Task Description	Reschedule the task for after the current visit is complete

	Manually initiate In-App Visit Workflow
Task Priority	5
How Task is Generated	Triggered if a member has an existing telemed visit workflow (for any telemed type) which will prevent OSA in-app Evaluation/ Diagnostic Video Visit from starting automatically (after member completes Sleep Questionnaire)
How Task is Resolved	Manual
Recommended Steps	Reschedule the task for after the current visit is complete Manually Initiate In-App Visit Workflow

22.29 OSA: Intro to OSA Workflow

22.29.1 OSA: Intro to OSA: Message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **OSA: Intro to OSA: Message member to update app**
2. OSA: Intro to OSA: Confirm app version
3. OSA: Intro to OSA: Intro to OSA Survey

1. OSA: Intro to OSA: Message member to update app

Task Priority	5
How Task is Generated	Manually triggered to send intro to the OSA offer
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve
Recommended Steps	If this task is not automatically resolved, check the app version (under Member profile). Message member to update the app

22.29.2 OSA: Intro to OSA: Confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Intro to OSA: Message member to update app
2. **OSA: Intro to OSA: Confirm app version**

3. OSA: Intro to OSA: Intro to OSA Survey

2. OSA: Intro to OSA: Confirm app version

Task Priority	8
How Task is Generated	Part of Intro to OSA workflow
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve

22.29.3 OSA: Intro to OSA: Intro to OSA Survey

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Intro to OSA: Message member to update app
2. OSA: Intro to OSA: Confirm app version
3. **OSA: Intro to OSA: Intro to OSA Survey**

3. OSA: Intro to OSA: Intro to OSA Survey

Task Priority	5
How Task is Generated	Part of Intro to OSA workflow
How Task is Resolved	Automatic Task will auto-resolve once member completes in-app activities
Recommended Steps	IN APP -> For You: 'Ready to learn about OSA?'

22.30 OSA: Sleep Questionnaire Workflow

22.30.1 OSA: Sleep Questionnaire Workflow: Message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **OSA: Sleep Questionnaire Workflow: Message member to update app**
2. OSA: Sleep Questionnaire Workflow: Confirm app version
3. OSA: Sleep Questionnaire Workflow: Validate member is set up with Brightree
4. OSA: Sleep Questionnaire Workflow: Sleep Questionnaire
5. OSA: Sleep Questionnaire Workflow: Ensure member has a Brightree ID

1. OSA: Sleep Questionnaire: Message member to update app

Task Priority	5

How Task is Generated	Automatically triggered when a member completes Intro to OSA workflow
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve
Recommended Steps	If this task is not automatically resolved, check the app version (under Member profile). Message member to update the app

22.30.2 OSA: Sleep Questionnaire Workflow: Confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Sleep Questionnaire Workflow: Message member to update app
2. **OSA: Sleep Questionnaire Workflow: Confirm app version**
3. OSA: Sleep Questionnaire Workflow: Validate member is set up with Brightree
4. OSA: Sleep Questionnaire Workflow: Sleep Questionnaire
5. OSA: Sleep Questionnaire Workflow: Ensure member has a Brightree ID

2. OSA: Sleep Questionnaire: Confirm app version

Task Priority	8
How Task is Generated	Part of Sleep Questionnaire Workflow
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve

22.30.3 OSA: Sleep Questionnaire Workflow: Validate member is set up with Brightree

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Sleep Questionnaire Workflow: Message member to update app
2. OSA: Sleep Questionnaire Workflow: Confirm app version
3. **OSA: Sleep Questionnaire Workflow: Validate member is set up with Brightree**
4. OSA: Sleep Questionnaire Workflow: Sleep Questionnaire
5. OSA: Sleep Questionnaire Workflow: Ensure member has a Brightree ID

3. OSA: Sleep Questionnaire: Validate member is set up with Brightree

Task Description	This task will be automatically resolved once the member has a Brightree id or has started the creation process
Task Priority	5
How Task is Generated	Part of Sleep Questionnaire Workflow

How Task is Resolved	Automatic
Recommended Steps	Contact/ task BetterNight CSR if task doesn't auto-resolve

22.30.4 OSA: Sleep Questionnaire Workflow: Sleep Questionnaire

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Sleep Questionnaire Workflow: Message member to update app
2. OSA: Sleep Questionnaire Workflow: Confirm app version
3. OSA: Sleep Questionnaire Workflow: Validate member is set up with Brightree
4. **OSA: Sleep Questionnaire Workflow: Sleep Questionnaire**
5. OSA: Sleep Questionnaire Workflow: Ensure member has a Brightree ID

4. OSA: Sleep Questionnaire: Sleep Questionnaire

Task Priority	5
How Task is Generated	Part of Sleep Questionnaire Workflow
How Task is Resolved	Automatic Task will auto-resolve once a member completes in-app activities.
Recommended Steps	IN APP→ For You: 'Ready to take a questionnaire?' (task will auto-resolve once member completes in APP activities - task BetterNight CSR if it doesn't auto-resolve)

22.30.5 OSA: Sleep Questionnaire Workflow: Ensure member has a Brightree ID

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Sleep Questionnaire Workflow: Message member to update app
2. OSA: Sleep Questionnaire Workflow: Confirm app version
3. OSA: Sleep Questionnaire Workflow: Validate member is set up with Brightree
4. OSA: Sleep Questionnaire Workflow: Sleep Questionnaire
5. **OSA: Sleep Questionnaire Workflow: Ensure member has a Brightree ID**

5. OSA: Sleep Questionnaire: Ensure member has a Brightree ID

Task Description	This task should be assigned to the BetterNight customer service representative administrator. If you are the admin, please ensure that the Brightree referral to create the patient is complete. This task will automatically resolve.
Task Priority	5

How Task is Generated	Part of Sleep Questionnaire Workflow
How Task is Resolved	Automatic
Recommended Steps	Contact/ task BetterNight CSR if task doesn't auto-resolve

22.31 Home Sleep Test Workflow

22.31.1 OSA: Home Sleep Test Workflow: Message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **OSA: Home Sleep Test Workflow: Message member to update app**
2. OSA: Home Sleep Test Workflow: Confirm app version
3. OSA: Home Sleep Test Workflow: Home Sleep Test Survey
4. OSA: Home Sleep Test Workflow: Place Home Sleep Test Order
5. OSA: Home Sleep Test Workflow: Home Sleep Test Order Shipment
6. OSA: Home Sleep Test Workflow: Hold for Home Sleep Test Results

1. OSA: Home Sleep Test Workflow: Message member to update app

Task Priority	5
How Task is Generated	Automatically triggered when a member completes OSA Evaluation Visit
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve
Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile). Message member to update the app

22.31.2 OSA: Home Sleep Test Workflow: Confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Home Sleep Test Workflow: Message member to update app
2. **OSA: Home Sleep Test Workflow: Confirm app version**
3. OSA: Home Sleep Test Workflow: Home Sleep Test Survey
4. OSA: Home Sleep Test Workflow: Place Home Sleep Test Order
5. OSA: Home Sleep Test Workflow: Home Sleep Test Order Shipment
6. OSA: Home Sleep Test Workflow: Hold for Home Sleep Test Results

2. OSA: Home Sleep Test Workflow: Confirm app version

Task Priority	8
How Task is Generated	Part of Home Sleep Test Workflow
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve

22.31.3 OSA: Home Sleep Test Workflow: Home Sleep Test Survey

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Home Sleep Test Workflow: Message member to update app
2. OSA: Home Sleep Test Workflow: Confirm app version
3. **OSA: Home Sleep Test Workflow: Home Sleep Test Survey**
4. OSA: Home Sleep Test Workflow: Place Home Sleep Test Order
5. OSA: Home Sleep Test Workflow: Home Sleep Test Order Shipment
6. OSA: Home Sleep Test Workflow: Hold for Home Sleep Test Results

3. OSA: Home Sleep Test Workflow: Home Sleep Test Survey

Task Priority	5
How Task is Generated	Part of Home Sleep Test Workflow
How Task is Resolved	Automatically Task will auto-resolve once member completes in APP activities: confirming shipping address for HST order This task is automatically assigned to BetterNight: CSR BN CSR to resolve this task once HST results are available
Recommended Steps	IN APP → Spotlight: Complete your home sleep test order

22.31.4 OSA: Home Sleep Test Workflow: Place Home Sleep Test Order

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Home Sleep Test Workflow: Message member to update app
2. OSA: Home Sleep Test Workflow: Confirm app version
3. OSA: Home Sleep Test Workflow: Home Sleep Test Survey
4. **OSA: Home Sleep Test Workflow: Place Home Sleep Test Order**
5. OSA: Home Sleep Test Workflow: Home Sleep Test Order Shipment
6. OSA: Home Sleep Test Workflow: Hold for Home Sleep Test Results

4. OSA: Home Sleep Test Workflow: Place Home Sleep Test Order

Task Description	This task will place a home sleep test order in Brightree and subsequently resolve itself automatically. No action is needed.
Task Priority	5
How Task is Generated	Part of Home Sleep Test Workflow
How Task is Resolved	Automatically
Recommended Steps	IN APP

22.31.5 OSA: Home Sleep Test Workflow: Home Sleep Test Order Shipment

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Home Sleep Test Workflow: Message member to update app
2. OSA: Home Sleep Test Workflow: Confirm app version
3. OSA: Home Sleep Test Workflow: Home Sleep Test Survey
4. OSA: Home Sleep Test Workflow: Place Home Sleep Test Order
5. **OSA: Home Sleep Test Workflow: Home Sleep Test Order Shipment**
6. OSA: Home Sleep Test Workflow: Hold for Home Sleep Test Results

5. OSA: Home Sleep Test Workflow: Home Sleep Test Order Shipment

Task Description	This task signals that the home sleep test has been shipped. No action is needed.
Task Priority	5
How Task is Generated	Part of Home Sleep Test Workflow
How Task is Resolved	Automatically
Recommended Steps	IN APP

22.31.6 OSA: Home Sleep Test Workflow: Hold for Home Sleep Test Results

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Home Sleep Test Workflow: Message member to update app
2. OSA: Home Sleep Test Workflow: Confirm app version
3. OSA: Home Sleep Test Workflow: Home Sleep Test Survey
4. OSA: Home Sleep Test Workflow: Place Home Sleep Test Order
5. OSA: Home Sleep Test Workflow: Home Sleep Test Order Shipment
6. **OSA: Home Sleep Test Workflow: Hold for Home Sleep Test Results**

6. OSA: Home Sleep Test Workflow: Hold for Home Sleep Test Results

Task Description	This task should be assigned to the BetterNight customer service representative administrator. If you are the admin, please resolve this task once the home sleep test results are available in the system.
Task Priority	5
How Task is Generated	Part of Home Sleep Test Workflow
How Task is Resolved	This task is automatically assigned to BetterNight: CSR BN CSR to resolve this task once HST results are available

22.32 OSA: PAP Shipment Workflow

22.32.1 OSA: PAP Shipment Workflow: Message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **OSA: PAP Shipment Workflow: Message member to update app**
2. OSA: PAP Shipment Workflow: Confirm app version
3. OSA: PAP Shipment Workflow: PAP Shipment Survey
4. OSA: PAP Shipment Workflow: Place PAP Order
5. OSA: PAP Shipment Workflow: PAP Order Shipment
6. OSA: PAP Shipment Workflow: PAP Order Delivered
7. OSA: PAP Shipment Workflow: The patient's PAP machine was not properly set up

1. OSA: PAP Shipment Workflow: Message member to update app

Task Priority	5
How Task is Generated	Triggered automatically when a member completes OSA Diagnostic Visit
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve
Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile). Message member to update the app

22.32.2 OSA: PAP Shipment Workflow: Confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: PAP Shipment Workflow: Message member to update app
2. **OSA: PAP Shipment Workflow: Confirm app version**
3. OSA: PAP Shipment Workflow: PAP Shipment Survey
4. OSA: PAP Shipment Workflow: Place PAP Order
5. OSA: PAP Shipment Workflow: PAP Order Shipment
6. OSA: PAP Shipment Workflow: PAP Order Delivered
7. OSA: PAP Shipment Workflow: The patient's PAP machine was not properly set up

2. OSA: PAP Shipment Workflow: Confirm app version

Task Priority	8
How Task is Generated	Part of OSA: PAP Shipment Workflow
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve

22.32.3 OSA: PAP Shipment Workflow: PAP Shipment Survey

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: PAP Shipment Workflow: Message member to update app
2. OSA: PAP Shipment Workflow: Confirm app version
3. **OSA: PAP Shipment Workflow: PAP Shipment Survey**
4. OSA: PAP Shipment Workflow: Place PAP Order
5. OSA: PAP Shipment Workflow: PAP Order Shipment
6. OSA: PAP Shipment Workflow: PAP Order Delivered
7. OSA: PAP Shipment Workflow: The patient's PAP machine was not properly set up

3. OSA: PAP Shipment Workflow: PAP Shipment Survey

Task Priority	5
How Task is Generated	Part of OSA: PAP Shipment Workflow
How Task is Resolved	Automatic Task will auto-resolve once member completes in-app activities
Recommended Steps	IN APP→ 'Begin APP Therapy' Set goals for treatment: consider how OSA impacts your life Build your PAP welcome kit: choose a mask that works for you - full face mask or nasal mask Order your PAP Welcome Kit

22.32.4 OSA: PAP Shipment Workflow: Place PAP Order

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: PAP Shipment Workflow: Message member to update app
2. OSA: PAP Shipment Workflow: Confirm app version
3. OSA: PAP Shipment Workflow: PAP Shipment Survey
4. **OSA: PAP Shipment Workflow: Place PAP Order**
5. OSA: PAP Shipment Workflow: PAP Order Shipment
6. OSA: PAP Shipment Workflow: PAP Order Delivered
7. OSA: PAP Shipment Workflow: The patient's PAP machine was not properly set up

4. OSA: PAP Shipment Workflow: Place PAP Order

Task Description	This task will place an order for PAP equipment in Brightree and subsequently resolve itself automatically. No action is needed.
Task Priority	5
How Task is Generated	Part of OSA: PAP Shipment Workflow
How Task is Resolved	Automatic
Recommended Steps	In APP

22.32.5 OSA: PAP Shipment Workflow: PAP Order Shipment

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: PAP Shipment Workflow: Message member to update app
2. OSA: PAP Shipment Workflow: Confirm app version
3. OSA: PAP Shipment Workflow: PAP Shipment Survey
4. OSA: PAP Shipment Workflow: Place PAP Order
5. **OSA: PAP Shipment Workflow: PAP Order Shipment**
6. OSA: PAP Shipment Workflow: PAP Order Delivered
7. OSA: PAP Shipment Workflow: The patient's PAP machine was not properly set up

5. OSA: PAP Shipment Workflow: PAP Order Shipment

Task Description	This task signals that the PAP equipment has been shipped. No action is needed.
Task Priority	5
How Task is Generated	Part of OSA: PAP Shipment Workflow
How Task is Resolved	Automatic
Recommended Steps	In APP

22.32.6 OSA: PAP Shipment Workflow: PAP Order Delivered

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: PAP Shipment Workflow: Message member to update app
2. OSA: PAP Shipment Workflow: Confirm app version
3. OSA: PAP Shipment Workflow: PAP Shipment Survey
4. OSA: PAP Shipment Workflow: Place PAP Order
5. OSA: PAP Shipment Workflow: PAP Order Shipment
6. **OSA: PAP Shipment Workflow: PAP Order Delivered**
7. OSA: PAP Shipment Workflow: The patient's PAP machine was not properly set up

6. OSA: PAP Shipment Workflow: PAP Order Delivered

Task Priority	?
How Task is Generated	Part of OSA: PAP Shipment Workflow
How Task is Resolved	Automatic
Recommended Steps	In APP

22.32.7 OSA: PAP Shipment Workflow: The patient's PAP machine was not properly set up

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: PAP Shipment Workflow: Message member to update app
2. OSA: PAP Shipment Workflow: Confirm app version
3. OSA: PAP Shipment Workflow: PAP Shipment Survey
4. OSA: PAP Shipment Workflow: Place PAP Order
5. OSA: PAP Shipment Workflow: PAP Order Shipment
6. OSA: PAP Shipment Workflow: PAP Order Delivered
7. **OSA: PAP Shipment Workflow: The patient's PAP machine was not properly set up**

7. OSA: PAP Shipment Workflow: The patient's PAP machine was not properly set up

Task Priority	5
How Task is Generated	Triggered if a member's PAP is not properly set up by BetterNight or by the Verily system (we won't see member data if it is not set up correctly).
How Task is Resolved	Automatic Task will auto-resolve if member has an airview ID
Recommended Steps	Task BN CSR to contact On-call eng to see if member is properly registered in the system

22.33 OSA: PAP Setup Workflow

22.33.1 OSA: PAP Setup Workflow: Confirm prerequisite workflow

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **OSA: PAP Setup Workflow: Confirm prerequisite workflow**
2. OSA: PAP Setup Workflow: Message member to update app
3. OSA: PAP Setup Workflow: Confirm app version
4. OSA: PAP Setup Workflow: PAP setup

1. OSA: PAP Setup Workflow: Confirm prerequisite workflow

Task Description	Note set if failed prerequisite: "Member hasn't done prerequisite PAP Shipment Workflow"
Task Priority	8
How Task is Generated	Triggered automatically when a member confirms PAP was delivered
How Task is Resolved	Automatic If the prerequisite workflow has been completed, this task will auto resolve.
Recommended Steps	Make sure the PAP shipment workflow has been completed by member IN APP.

22.33.2 OSA: PAP Setup Workflow: Message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: PAP Setup Workflow: Confirm prerequisite workflow
2. **OSA: PAP Setup Workflow: Message member to update app**
3. OSA: PAP Setup Workflow: Confirm app version
4. OSA: PAP Setup Workflow: PAP setup

2. OSA: PAP Setup Workflow: Message member to update app

Task Priority	5
How Task is Generated	Part of OSA: PAP Setup Workflow
How Task is Resolved	Automatic

	If app is up to date this task will auto-resolve
Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile) Message member to update the app

22.33.3 OSA: PAP Setup Workflow: Confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: PAP Setup Workflow: Confirm prerequisite workflow
2. OSA: PAP Setup Workflow: Message member to update app
3. **OSA: PAP Setup Workflow: Confirm app version**
4. OSA: PAP Setup Workflow: PAP setup

3. OSA: PAP Setup Workflow: Confirm app version

Task Priority	8
How Task is Generated	Part of OSA: PAP Setup Workflow
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve

22.33.4 OSA: PAP Setup Workflow: PAP setup

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: PAP Setup Workflow: Confirm prerequisite workflow
2. OSA: PAP Setup Workflow: Message member to update app
3. OSA: PAP Setup Workflow: Confirm app version
4. **OSA: PAP Setup Workflow: PAP setup**

4. OSA: PAP Setup Workflow: PAP setup

Task Description	This task will send the OSA PAP setup activity to the member. It will resolve when the member completes the activity.
Task Priority	5
How Task is Generated	Part of OSA: PAP Setup Workflow
How Task is Resolved	Automatic
Recommended Steps	In-APP

22.34 OSA: Mask Trial Workflow

22.34.1 OSA: Mask Trial Workflow: Confirm prerequisite workflow

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **OSA: Mask Trial Workflow: Confirm prerequisite workflow**
2. OSA: Mask Trial Workflow: Message member to update app
3. OSA: Mask Trial Workflow: Confirm app version
4. OSA: Mask Trial Workflow: OSA: Mask trial

1. OSA: Mask Trial Workflow: Confirm prerequisite workflow

Task Description	Note set if failed prerequisite: "Member hasn't done prerequisite PAP Setup Workflow"
Task Priority	8
How Task is Generated	Triggered automatically when a PAP Set up workflow is completed
How Task is Resolved	Automatic If the prerequisite workflow has been completed, this task will auto-resolve
Recommended Steps	Make sure PAP setup workflow has been completed by member in APP

22.34.2 OSA: Mask Trial Workflow: Message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Mask Trial Workflow: Confirm prerequisite workflow
2. **OSA: Mask Trial Workflow: Message member to update app**
3. OSA: Mask Trial Workflow: Confirm app version
4. OSA: Mask Trial Workflow: OSA: Mask trial

2. OSA: Mask Trial Workflow: Message member to update app

Task Priority	5
How Task is Generated	Part of OSA: Mask Trial Workflow
How Task is Resolved	Automatic If app is up to date this task will auto-resolve

Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile) Message member to update the app

22.34.3 OSA: Mask Trial Workflow: Confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Mask Trial Workflow: Confirm prerequisite workflow
2. OSA: Mask Trial Workflow: Message member to update app
3. **OSA: Mask Trial Workflow: Confirm app version**
4. OSA: Mask Trial Workflow: OSA: Mask trial

3. OSA: Mask Trial Workflow: Confirm app version

Task Priority	8
How Task is Generated	Part of OSA: Mask Trial Workflow
How Task is Resolved	Automatic If app is up to date this task will auto-resolve

22.34.4 OSA: Mask Trial Workflow: OSA: Mask trial

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: Mask Trial Workflow: Confirm prerequisite workflow
2. OSA: Mask Trial Workflow: Message member to update app
3. OSA: Mask Trial Workflow: Confirm app version
4. **OSA: Mask Trial Workflow: OSA: Mask trial**

4. OSA: Mask Trial Workflow: OSA: Mask trial

Task Description	This task will send the OSA Mask trial activity to the member. It will resolve when the member completes the activity.
Task Priority	5
How Task is Generated	Part of OSA: Mask Trial Workflow
How Task is Resolved	Automatic
Recommended Steps	In-APP

22.35 OSA: First Night Workflow

22.35.1 OSA: First Night Workflow: Confirm prerequisite workflow

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **OSA: First Night Workflow: Confirm prerequisite workflow**
2. OSA: First Night Workflow: Patient’s PAP not properly set up
3. OSA: First Night Workflow: Message member to update app
4. OSA: First Night Workflow: Confirm app version
5. OSA: First Night Workflow: First Night - assign checkpoint
6. OSA: First Night Workflow: First Night - checkpoint completed

1. OSA: First Night Workflow: Confirm prerequisite workflow

Task Description	Note set if failed prerequisite: "Member hasn't done prerequisite Mask Trial Workflow"
Task Priority	8
How Task is Generated	Triggered when Mask Trial Workflow is complete
How Task is Resolved	Automatic If the prerequisite workflow has been completed, this task will auto-resolve
Recommended Steps	Make sure Mask Trial workflow has been completed by member in App

22.35.2 OSA: First Night Workflow: Patient’s PAP not properly set up

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: First Night Workflow: Confirm prerequisite workflow
2. **OSA: First Night Workflow: Patient’s PAP not properly set up**
3. OSA: First Night Workflow: Message member to update app
4. OSA: First Night Workflow: Confirm app version
5. OSA: First Night Workflow: First Night - assign checkpoint
6. OSA: First Night Workflow: First Night - checkpoint completed

2. OSA: First Night Workflow: Patient’s PAP not properly set up

Task Priority	5
How Task is Generated	Part of OSA: First Night Workflow
How Task is Resolved	Automatic

	Task will auto-resolve if member has an airview ID
Recommended Steps	Task Better Night CSR to contact On-call eng to see if member is properly registered in the system

22.35.3 OSA: First Night Workflow: Message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: First Night Workflow: Confirm prerequisite workflow
2. OSA: First Night Workflow: Patient's PAP not properly set up
3. **OSA: First Night Workflow: Message member to update app**
4. OSA: First Night Workflow: Confirm app version
5. OSA: First Night Workflow: First Night - assign checkpoint
6. OSA: First Night Workflow: First Night - checkpoint completed

3. OSA: First Night Workflow: Message member to update app

Task Priority	5
How Task is Generated	Part of OSA: First Night Workflow
How Task is Resolved	Automatic If app is up to date this task will auto-resolve
Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile) Message member to update the app

22.35.4 OSA: First Night Workflow: Confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: First Night Workflow: Confirm prerequisite workflow
2. OSA: First Night Workflow: Patient's PAP not properly set up
3. OSA: First Night Workflow: Message member to update app
4. **OSA: First Night Workflow: Confirm app version**
5. OSA: First Night Workflow: First Night - assign checkpoint
6. OSA: First Night Workflow: First Night - checkpoint completed

4. OSA: First Night Workflow: Confirm app version

Task Priority	8
How Task is Generated	Part of OSA: First Night Workflow
How Task is Resolved	Automatic

	If app is up to date, this task will auto-resolve

22.35.5 OSA: First Night Workflow: First Night - assign checkpoint

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: First Night Workflow: Confirm prerequisite workflow
2. OSA: First Night Workflow: Patient's PAP not properly set up
3. OSA: First Night Workflow: Message member to update app
4. OSA: First Night Workflow: Confirm app version
5. **OSA: First Night Workflow: First Night - assign checkpoint**
6. OSA: First Night Workflow: First Night - checkpoint completed

5. OSA: First Night Workflow: First Night - assign checkpoint

Task Description	This task signals that the member is ready for the First Night checkpoint. Follow the coaching protocol.
Task Priority	5
How Task is Generated	Part of OSA: First Night Workflow
How Task is Resolved	Automatic
Recommended Steps	Make sure First Night Checkpoint is assigned to member (Care Plan > Manage Program > Library > First Night Checkpoint)

22.35.6 OSA: First Night Workflow: First Night - checkpoint completed

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: First Night Workflow: Confirm prerequisite workflow
2. OSA: First Night Workflow: Patient's PAP not properly set up
3. OSA: First Night Workflow: Message member to update app
4. OSA: First Night Workflow: Confirm app version
5. OSA: First Night Workflow: First Night - assign checkpoint
6. **OSA: First Night Workflow: First Night - checkpoint completed**

6. OSA: First Night Workflow: First Night - checkpoint completed

Task Description	This task will resolve when the member completes the OSA First Night checkpoint.
Task Priority	5
How Task is Generated	Part of OSA: First Night Workflow

How Task is Resolved	Automatic This task will resolve when the member complete the OSA First Night checkpoint
Recommended Steps	Follow up with member

22.36 OSA: First Week Workflow

22.36.1 OSA: First Week Workflow: Confirm prerequisite workflow

After one task is resolved in the workflow, the system will automatically generate the next task.

1. **OSA: First Week Workflow: Confirm prerequisite workflow**
2. OSA: First Week Workflow: Message member to update app
3. OSA: First Week Workflow: Confirm app version
4. OSA: First Week Workflow: First Week - Assign Checkpoint
5. OSA: First Week Workflow: First Week - checkpoint completed

1. OSA: First Week Workflow: Confirm prerequisite workflow

Task Description	Note set if failed prerequisite: "Member hasn't done prerequisite Mask Trial Workflow"
Task Priority	8
How Task is Generated	Triggered when First Night workflow is complete
How Task is Resolved	Automatic If the prerequisite workflow has been completed, this task will auto-resolve
Recommended Steps	Make sure First Night workflow has been completed by member in App

22.36.2 OSA: First Week Workflow: Message member to update app

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: First Week Workflow: Confirm prerequisite workflow
2. **OSA: First Week Workflow: Message member to update app**
3. OSA: First Week Workflow: Confirm app version
4. OSA: First Week Workflow: First Week - Assign Checkpoint
5. OSA: First Week Workflow: First Week - checkpoint completed

2. OSA: First Week Workflow: Message member to update app

Task Priority	5
How Task is Generated	Part of OSA: First Week Workflow
How Task is Resolved	Automatic If app is up to date this task will auto-resolve
Recommended Steps	If this task is not automatically resolved, check the app version (under Member Profile) Message member to update the app

22.36.3 OSA: First Week Workflow: Confirm app version

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: First Week Workflow: Confirm prerequisite workflow
2. OSA: First Week Workflow: Message member to update app
3. **OSA: First Week Workflow: Confirm app version**
4. OSA: First Week Workflow: First Week - Assign Checkpoint
5. OSA: First Week Workflow: First Week - checkpoint completed

3. OSA: First Week Workflow: Confirm app version

Task Priority	8
How Task is Generated	Part of OSA: PAP Setup Workflow
How Task is Resolved	Automatic If app is up to date, this task will auto-resolve

22.36.4 OSA: First Week Workflow: First Week - Assign Checkpoint

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: First Week Workflow: Confirm prerequisite workflow
2. OSA: First Week Workflow: Message member to update app
3. OSA: First Week Workflow: Confirm app version
4. **OSA: First Week Workflow: First Week - Assign Checkpoint**
5. OSA: First Week Workflow: First Week - checkpoint completed

4. OSA: First Week Workflow: First Week - Assign Checkpoint

Task Description	This task signals that the member is ready for the First Week checkpoint. Follow the coaching protocol.
Task Priority	5

How Task is Generated	Part of OSA: PAP Setup Workflow
How Task is Resolved	Automatic
Recommended Steps	Make sure First Week Checkpoint is assigned to member (Care Plan > Manage Program > Library > First Night Checkpoint)

22.36.5 OSA: First Week Workflow: First Week - checkpoint completed

After one task is resolved in the workflow, the system will automatically generate the next task.

1. OSA: First Week Workflow: Confirm prerequisite workflow
2. OSA: First Week Workflow: Message member to update app
3. OSA: First Week Workflow: Confirm app version
4. OSA: First Week Workflow: First Week - Assign Checkpoint
5. **OSA: First Week Workflow: First Week - checkpoint completed**

5. OSA: First Week Workflow: First Week - checkpoint completed

Task Description	This task will resolve when the member completes the OSA First Week checkpoint.
Task Priority	5
How Task is Generated	Part of OSA: PAP Setup Workflow
How Task is Resolved	Automatic This task will auto-resolve when the member completes the OSA First Week Checkpoint
Recommended Steps	Follow up with member

22.37 OSA: In-APP Evaluation Video Visit Workflow

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22.38 OSA: In-APP Diagnostic Video Visit Workflow

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22.39 OSA: In-APP Ad Hoc MD Video Visit Workflow

[placeholder]

22.40 OSA: In-APP PAP Follow-Up Video Visit Workflow

[placeholder]

22.41 OSA: In-APP PAP Annual Video Visit Workflow

[placeholder]

22.42 OSA Escalations

22.42.1 Low PAP Usage

Task Priority	3
How Task is Generated	Triggered when: PAP usage is <4 hours for 3 calendar days in a 7 day window If the task is open, the system will not trigger a new task The system will begin a new 7 day window from the point at which the task is resolved
How Task is Resolved	Manual
Recommended Steps	Escalate

22.42.2 High AHI

Task Priority	3
How Task is Generated	Triggered when: If the user has 3 calendar days of AHI > 10 events/hr in a 7 day window If the task is open, the system will not trigger a new task The system will begin a new 7 day window from the point at which the task is resolved
How Task is Resolved	Manual
Recommended Steps	Escalate

22.42.3 High Mask Leak

Task Priority	3
How Task is Generated	Triggered when: If the user has 3 consecutive days of leaks over 24 L/min If the task is open, the system will not trigger a new task
How Task is Resolved	Manual
Recommended Steps	Escalate

22.42.4 Obstructive Sleep Apnea Brightree Patient Does Not Exist

Task Description	This task should be assigned to the BetterNight customer service representative administrator. If you are the admin, please ensure that the Brightree referral to create the patient is complete. This task will automatically resolve.
Task Priority	5
How Task is Generated	Triggered when: Patient does not have Patient ID set
How Task is Resolved	Manual
Recommended Steps	Escalate

22.42.5 OSA: Patient's PAP Not Properly Set Up

Task Description	The patient's PAP device is not set up properly. Please view the Task Handling document for more information on how to handle this situation.
Task Priority	5
How Task is Generated	Triggered when: Patient has no ECN Patient has completed Mask Trial workflow strategy survey
How Task is Resolved	Manual
Recommended Steps	Escalate

22.42.6 OSA: PAP Resupply Report

Task Description	Review Resupply Report
Task Priority	9
How Task is Generated	When the member completes the OSA Resupply Survey.
How Task is Resolved	Manual
Recommended Steps	Review the Resupply Report and contact the member about their inquiry.

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