

Script for Demo-ing ACM

- Let's start on the login screen.
- You'll notice the option to sign in with your PCC credentials. I'm highlighting this because it means one less username to create and password to remember. You simply log in with the credentials you already know and have.

LOG IN

Templates and Categories

- The first thing you'll see is a list of templates and categories. We understand that taking the time to write messages and create content and wordsmithing in general can be difficult to do and time-consuming, so we've gone ahead and saved that time by creating a list of templates for you to choose from.
- We've also categorized them to make it easier to navigate and find them and help you organize them in a way that's going to work for your facility.
- This might look a little bit overwhelming at first so I'm going to show you how to pull in the templates that you want.
- Click the TEMPLATE LIBRARY button on the bottom right-hand corner and you'll see the list of templates we provided for you.
- To see the content of a template simply click the information icon on the right-hand side and you'll get a preview of what is in each message.
- To import templates simply click on the box next to it.
- To import an entire category simply click on the button next to the category name, click import and all the templates you selected will automatically in be imported into ACM for you.
- To create new template categories, it is much the same. Click on the CREATE CATEGORY button.
- This is great for multiple facilities, allowing each facility to bundle specific templates just for them.
- You'll notice numbers next to the category names. These are dynamic and provide an overview of how many templates are within each category.
- Now if you want to create your own messages and templates from scratch you can absolutely do that.
- Click the PLUS button in the bottom right-hand corner to open a new template.
- Write and save your messages. You can see at the very bottom that if you want to add it to an existing category you can go ahead and do that right from the template.

Filtering and sending a message - basic

- We like to say that everything in ACM is as simple as 1, 2, 3. So to start off I'm going to show you how to send a message in these simple three steps: 1) choose and modify a template, 2) filter your audience and 3) press send.

OPEN TEMPLATE FLU SHOT CLINIC ANNOUNCEMENT IN FACILITY EVENTS CATEGORY

- As you can see step one is already done, and we have chosen our template.
- In this template I'm going to highlight a few things the first: you'll notice this green tag, called a variable tag that will pull things like resident name and facility name from your EHR so you can create templates that will be dynamic and personalized.
- There is also text in the templates that is indicated with upper case text and between square brackets. These are pieces of information you'll need to manually change with each message.
- Now for Step 2, we will start to filter your audience by clicking on the To: option, and because ACM is mapped to your HER, you can access all your resident contact information.
- Choose your facility and recipient type – we are choosing All Resident Contacts for this example.
- Next is Resident Status. Note here you can communicate with any resident in your EHR, whether they have yet to move-in, are current, or have been discharged.
- Finally, we have Resident Contacts. We're going to choose all Residents, but this filter allows you to choose a unit with an outbreak, a floor that is getting painted, or even individual rooms.
- When you are happy with your filters, hit Apply.
- We're back at your message. A best practice we encourage is to test your message before you send it. This will let you hear or see if there are any errors or omissions in your message and allows you to adjust before sending to a wider audience.
- Choose the communication channel you want to receive the test, voice, email or text.
- When you are happy with your message, hit SEND, and that's it! 1,2,3 you're done!

Creating a new message with AI Message Assistant

- Before I move to the more advanced features and filters, I want to show you a NEW feature we are really excited about.
- Message Assistant uses Generative AI to help improve messages or write them from scratch.
- Let's open a new message to show you how it works (OPEN NEW MESSAGE)
- Let's start with the same message theme we just used – a flu shot clinic – and write a message from scratch
- PASTE THIS MESSAGE IN – WITH INTENTIONAL ERRORS:
" Helo,
We are having a flu shot clinck. Please let us know if you are coming by returning the atached consent form by the 24th. Thank you."
- Now we filter our audience – we'll choose Resident Contacts
- From here there are 3 prompts to help you refine your message
- First, we'll click on CORRECT MESSAGE, to correct any spelling or grammar mistakes.
- Next, we'll click IMPROVE MESSAGE, this will enhance and add to your message while keeping essential information. You can use this as many times as you like until you get the message you want.

- If you decide you like a previous message, just click UNDO
- Message too long? Hit SHORTEN MESSAGE
- Now, you can also skip the first step of writing and get Message Assistant to write you content from scratch. You just need to provide the basic information you want.
- PASTE INTO FREE TEXT FIELD: “we are going to have a flu vaccine clinic. Invite residents and get them to fill out a consent form” PRESS GENERATE
- Once your message is generated, you can either use the 3 given prompts, or keep adding instructions to the free text field, you can give instructions like, add a greeting, or make tone more friendly.
- Keep iterating, and remember, you can always use the undo button to go back

Filtering and sending a message – advanced

OPEN TEMPLATE RESIDENT CARE PLAN | QUARTERLY CARE CONFERENCE IN RESIDENT UPDATES CATEGORY

- Now, let’s take a deeper dive and show you the various ways to make your messaging more robust and filtering more specific.
- At first glance, this message is like the one we just looked at. But when we scroll down, you’ll notice we have added a poll.

QUESTION TYPES

- ACM has several ways you can ask for feedback, ratings and multiple-choice questions and free text responses.
- You can add them to a message by clicking the Message Type dropdown.
- Ratings are great for soliciting feedback on things like move-in and discharge experiences, or even events you’ve held. The default rating scale is from 1 to 5.
- Multiple-choice questions, like the one in this template, can be used to gather RSVPs, or food preferences as an example. Again, you can customize it to your needs and add as many response options as you like.
- Text response lets you ask for a response creating a short, topic-specific dialogue without allowing the recipient to start a whole new conversation.
- I’ll show how results can be found and used when we cover reporting in a moment.

ATTACHMENTS

- Moving on with our message, you’ll notice we mention an attachment.
- Much like email, you click on the paperclip icon, and attach any document or documents you like. There are no limits on the number of attachments you can add, if you stay under a 10MB limit.
- It should be noted that adding an attachment automatically means that the message will be sent as an email.

DIRECT SEND

- Sending a direct message will look familiar as we start the same way as for any message by choosing your facility.
- But this time we are going to search by resident name. As we are sending an invitation to a care conference, we want to include only the relevant resident contacts.
- You can input the full name, or search by the first letter of their first or last name.
- This feature allows you to send direct messages to an individual or a to a small, targeted group.
- Once you have your resident chosen, scroll down to Message Options.

MESSAGE OPTIONS

- This is the section for more advanced options on a message level.
- At the top you'll see Communication Method, this allows to you override communication defaults and force send a message as a text, email, or voice call.
- The next 2 options are mapped to your EHR and are specific to your organization.
- Blackout override is useful in an emergency. This also allows you to override system defaults and force send a message between 9 pm and 9 am.
- Extra attempts to get a response is exactly what you think it is. If you absolutely need a response, you can schedule the message to re-send to any non-responders, you can choose how many retries and the time interval between each retry.
- Now I'm going to show you a newer feature: Schedule A Job.
- This allows you to send a job for either a distinct timeframe, say 4 hours from now, or a specific date and time. This is great for things you've scheduled in advance (like care conferences) but don't need to inform a resident family member yet. This can also be used for holiday messages or newsletters you may have written well in advance.
- There isn't a limit on how far you can set the date and time in the future, so it's very flexible. Just set it and forget it.
- Now, we hit "schedule" Or SEND if you are not scheduling. You'll get this pop-up to confirm all the details.
- So those are the more advanced filters and methods of sending messages. Any questions before we move on?

REPORTING AND ANALYTICS

- First, I'm going to show you how to see the jobs you've scheduled. Simply navigate to Pending Jobs in the Main Menu.
- All upcoming scheduled jobs and their details can be found here. You can also Cancel the job if needed.
- And what about the messages you've sent?
- Navigate to Sent Jobs. Here you'll see a record of every message sent. You can see who sent it, when and how many recipients it went to as well as the content of the message.
- You can email a more in-depth report to yourself or anyone else, this is great for audits.
- Now, remember that multiple choice question we sent in the care conference email? Clicking on the Job Info button will provide a deep dive into the responses given and allows you to select any recipients who have not yet answered, or who require a follow-

up. Hit SEND MESSAGE in the top right corner and you can either send the same template again or create a new message that will go to just the selected recipients.

- Back on the Job Info screen, you'll see an ANALYTICS button in the top corner. I like this feature as it gives you a visual overview of responses.
- This is a great feature for ratings questions. Say you send a message for feedback on the move-in process at the end of every quarter. You can see how many people chose 5 or a 3 and then follow up with them directly if you want more in-depth detail on their answer.

USER MANAGEMENT

- One of the great things about ACM is the level of control it provides over what users can and cannot do.
- In the USERS tab you can select the level of access for each user. This is also where you can add new users and disable old ones.
- Now, what does each of the roles (Org Admin, Facility Admin and User) mean?
- Under PRIVILEGES, is where you can fine tune who has access to what by role. For example, you may want only Org Admins to be able to create new templates. You can make those decisions here. Or you may only want Org and Facility Admins to be able to send direct messages. This is where you can make those decisions and changes.
- A new feature also lets you moderate users. This allows them to write messages, but before it can be sent to recipients, Admins can review, approve and reject messages providing an additional level of oversight.

CONSENT

- ACM is HIPAA compliant; it also allows you to manage other types of consent.
- NAVIGATE TO SETTINGS>ORGANIZATIONAL
- I'm going to show you one last thing.
- We know that you may occasionally be sending a private message with sensitive information. Our consent settings enable you to send a "pre-message" to confirm consent prior to the delivery of any messages with confidential or sensitive information. Once confirmed, your intended message will be sent.
- You can change this to always or never require consent. The default is set to request consent for any direct messages.

WRAP UP

- Now, ACM may be easy to use, but we know sometimes you need a bit of help. This green button in the corner opens the in-app Help Center which is full of articles, videos, instructions, tips, and tricks on how to use ACM. For example – forget how big an attachment can be? Simply search in the "SEARCH FOR HELP" bar and you'll get the corresponding article.
- This is also where new features, updates and news is shared, and where send direct inquiries to the Cliniconex team.

- And those are all the big things I have to show you! Can I answer any questions or clarify anything for you?