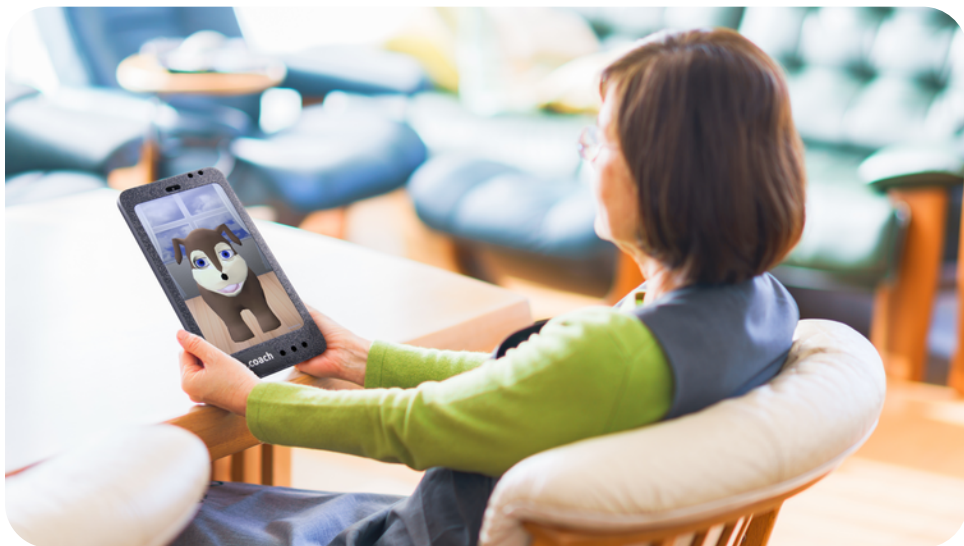




PACE IDT User Guide



Easy virtual support and companionship

care.coach Support Team

support@care.coach
1.855.437.4569 ext. 1

Customer Success Executive: Eric Warden

ericw@care.coach
1.856.448.3537

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Welcome to the care.coach family!

We are excited to have you as a customer! We have created this user guide as an **overview** of our services, to assist you with the process of launching an avatar and answer frequently asked questions. We recommend you keep this guide as a reference for any information you might need in the future and share with other colleagues that would benefit from this information.

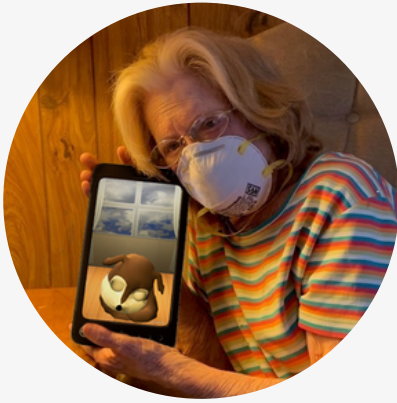
Services Overview

care.coach has developed a **customizable** platform with capabilities ranging from telemedicine to a **24x7** engaging avatar companion; all of which can be bundled or unbundled to meet the needs of your participants. The care.coach avatar is a real-time fusion of human and software intelligence, powered by live, 24x7 staff of care.coach-employed **health advocates**. They can see, hear, and speak with each participant through the avatar, and are guided by software algorithms to implement **evidence-based clinical protocols**.



The care.coach **Video Visit solution** is an easy to use, provider or caregiver-led telemedicine app, with an auto-answer option, that requires no intervention from the participant to have access to a call from their provider, caregiver or even a group of loved ones.

care.coach Solution



Human-supported avatar
24x7 relationship builds trust through individualized experiences



70% automated
Advanced machine learning models for conversation & relationship automation



Self-care coaching
1000's of evidence-based protocols to improve outcomes & cost of care

*"I'm so glad you're here.
You're not just a friend, you're
more like a brother to me."
- Avatar participant*

COVID-19 has accelerated a shift from the PACE center to the participant's home.

Our Results:

+90
NPS



-3.2
home visits
per month / avatar

22 mins
daily conversation



-25%
depression

-40%
rate of falls



5 yr
relationships



-9%
ED visits



135
days
median retention



3x
less loneliness



81%
opt-in rate

What is a care.coach avatar?

All-in-one software for health and social needs.

- **An avatar is a virtual health assistant platform** for complex individuals delivered through an engaging relationship with a pet avatar.
- The pet avatar is operated by highly trained human remote health advocates aided by software algorithms.
- **It is best for patients with multiple chronic conditions** who could benefit from condition management.
- It **improves self-management** by first addressing the explicit need for companionship & psychosocial support.
- When issues arise, health advocates alert the care team &/or caregivers, through predetermined escalation pathways, to intervene.
- **It works because it builds a trusting relationship &** enables surfacing of care needs through dialogue.
- The locked down tablet with built-in camera, can see & hear in real-time. Interactions are documented for monitoring & review.
- **No WiFi is required** for our devices! The device runs off cellular networks – All data is on a **HIPAA-secured** platform.

user guide 04

Participant Engagement Features

care.coach provides easy **customizable** virtual companionship, use as much or as little as you'd like. Here are some of the other features that the avatar can do.



jokes



reminders



audiobooks



music



games

meditation

news

photos

poetry

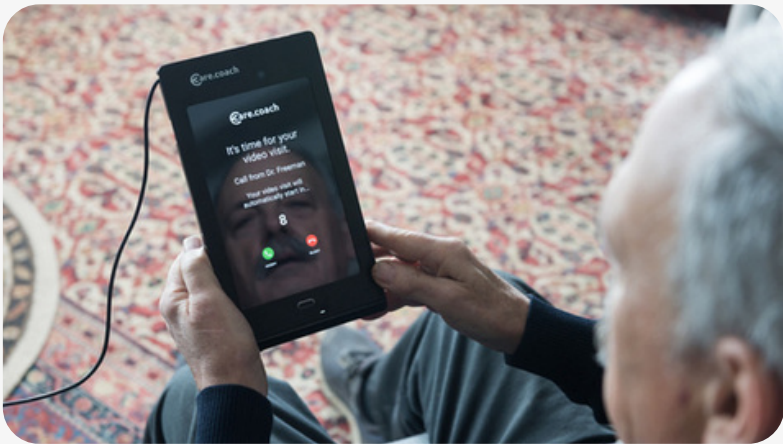
workouts



Video Visit Portal

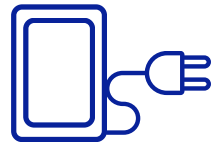
COVID-19 changed the way we care for vulnerable individuals. care.coach's **Video Visit** App enables providers and family members to **connect** with self-isolating individuals who may not be able to reliably maintain their own technology/device.

user guide 05



No-button, plug & play 4G device

Tablet-based health tool requiring no technology aptitude to operate



Multi-party video visits

Connect multiple care providers, members, and even family members

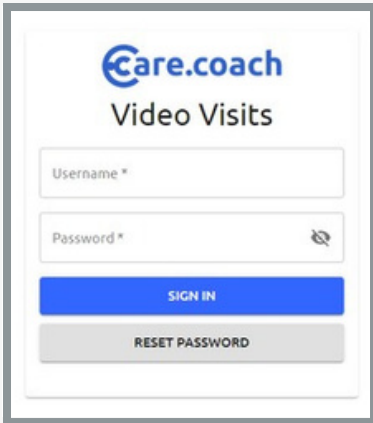


Avatar integration & loop closure

Live handoff from avatar clinical escalation, direct to video visit

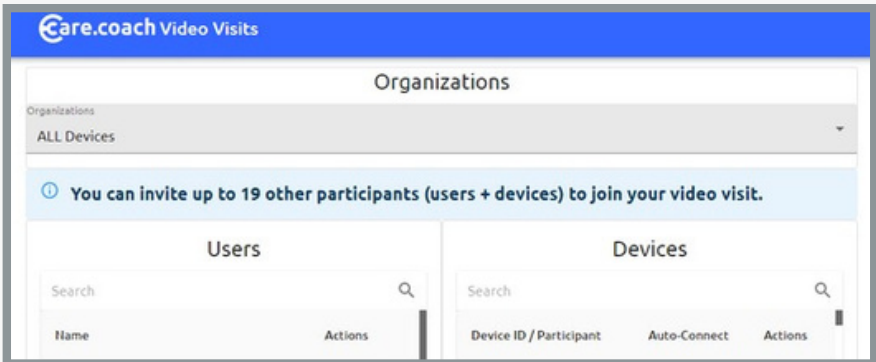


How to invite participants on Video Visit

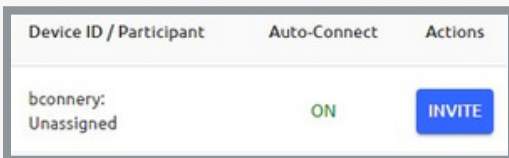


The screenshot shows the Care.coach Video Visits login interface. It features the Care.coach logo at the top, followed by the text "Video Visits". Below this are two input fields: "Username *" and "Password *". The password field has an eye icon for toggling visibility. At the bottom, there are two buttons: a blue "SIGN IN" button and a grey "RESET PASSWORD" button.

1. Open video.care.coach
2. Sign in with your username and password from care.coach via email.
3. Be sure your microphone, camera and notifications are allowed for this website.
4. Click on the "**Organizations**" drop down and select the one that you want to be in for this call. Once you select an Organization the "**Devices**" will appear.



The screenshot shows the Care.coach Video Visits interface after logging in. The header is "Care.coach Video Visits". Below it is a section titled "Organizations" with a dropdown menu currently set to "ALL Devices". A blue notification banner states: "You can invite up to 19 other participants (users + devices) to join your video visit." Below the notification are two side-by-side panels: "Users" and "Devices". Each panel has a search bar and a table with columns for "Name" (under Users) and "Device ID / Participant", "Auto-Connect", and "Actions" (under Devices).



Device ID / Participant	Auto-Connect	Actions
bconnery: Unassigned	ON	INVITE

5. Find the name of the participant's device and click "invite" to initiate a 1-on-1 call.

6. The participant has the option to accept or reject the call. If they do neither, the call and video will **automatically** connect in 10 seconds.
7. You can invite up to 19 participants for **group** video visit calls.
8. "**Users**" are staff members or family member that are utilizing their own computer or phone to call the device. If you would like to **call another user**, select "invite" next to their name under "Users". They will have to have the webpage open and notifications enabled on their browser to receive the message of an incoming call. Then they will have the option to accept or decline the call.

Uses for Video Visits

Bring the **PACE center** into the participant's home.



The features and benefits:

- Always on device to ensure **24x7** availability for **Telehealth**
- Hardware configurations for tech-averse adults: Provider/caregiver **initiates** & ends each video visit
- **Auto** app switching & auto full screen answer
- **Group calling** for care planning, family meetings or group activities
- Get **quick updates** and check-ins done for patients
- Help manage their **health from home**.



Contact support to:

- Learn more about care.coach Video Visits.
- Obtain your unique username login and password to log into the Video Visit portal.



855.437.4569
support@care.coach

Device Process

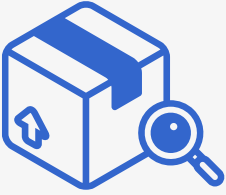
The following information is how the device process works, from ordering to shipment to disenrolling.

How to Order a Device:

1. Contact your customer success executive by email or phone.
2. Tell us the number of devices you are ordering and your shipping address.
3. We will confirm your order and send the order request to our device fulfillment operations.
4. They will ship the device and we will email you a tracking number upon its shipment.



If you would like a specific **shipping provider**, please request it when you are ordering a device. We can send devices via USPS, UPS, and FedEx.



What's in the Box?

When you order a device, it will arrive in a **white box** taped with our blue color and logo.

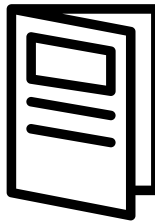
The items in the box are as follows:

- The care.coach device(s)
- Packaging foam
- Warning AV sticker
- A complimentary care.coach cleaning cloth
- Terms of Service Agreement booklet
- A welcome flyer/setup guide
- And packaging materials

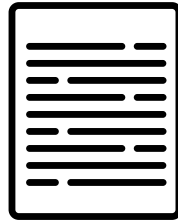
care.coach device



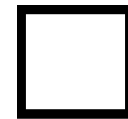
TOS Booklet



Welcome Flyer



cleaning cloth



AV Sticker

Device Setup



There's nothing to install. There's nothing to program. You don't need internet or a computer connection.

When your package arrives:

Open the package and **plug in** your device(s).

Press and hold the **power button** for about 10 seconds until you see SAMSUNG come on the screen. The device will load and the sleeping dog should appear. He will probably be snoring. If you would like this feature turned off, tap him on the head and when he wakes up, ask him to turn off his snoring.

- IF the dog does not appear on the screen after about 3 minutes, and the screen appears to be stuck on a black and white loading screen, please call our support team for assistance.
- IF the screen has a % with a number by it, that is the battery charge and it means the device has not fully been turned on yet. Press and hold the power button for 10 seconds until SAMSUNG comes on the screen.

Tip: We recommend you turn the device on and have it fully loaded at least **24 hours** before introducing it to a new participant. This will allow the system to have the most updated version of the software and decrease the likelihood of technical difficulties when you are trying to enroll someone new.

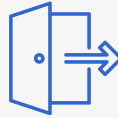
How to Enroll

After you receive your device, follow these steps to **enroll a device** with a participant.

1. **Identify** participant
2. **Contact** participant
3. Schedule appointment with participant for introduction to device
4. Complete the online **enrollment form**
5. **Give** the Avatar to the participant to answer questions and complete enrollment
6. Avatar customization may be requested by email.



How to Disenroll



Disenrollment Process:

If you have provided the avatar with **ANY personal information** for an individual and they decide they do not want the avatar in home then you need to disenroll the device. To do this, just tap the avatar on the head and tell it that you want to disenroll. The avatar will ask for the disenrollment code and you should provide them with the code below. Once the code is verified, they will archive the account and set the device back to out of box settings. The avatar will then be prepared to meet a new individual.

Disenrollment code: always the current year - For example "2023"

Customizing Reminders and Interventions



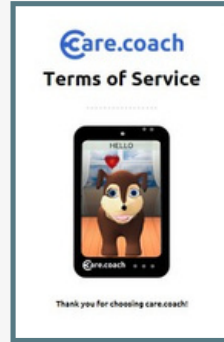
To make a change to an account, send an email with your request to support@care.coach including the **device number** and **participant initials**.



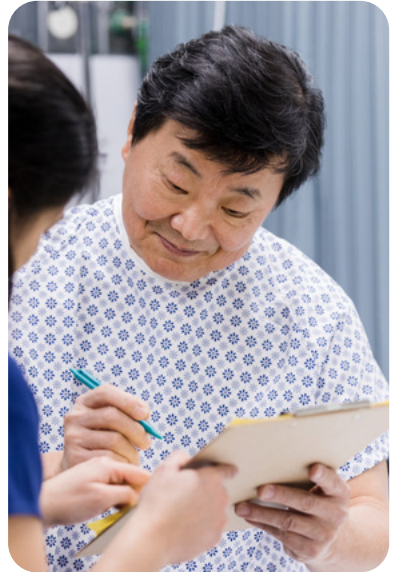
Our team will receive the information and make changes within 48 business hours. If you need a more urgent reminder, please contact our support team by phone or email

Terms of Services & Consent Forms

care.coach will mail a copy of the **terms of service** with each device. This should be provided to each participant. The terms can also be found online at: [care.coach Terms of Service](#)



In addition to the terms, care.coach would recommend your organization have an **internal consent form** for each participant to sign to agree to participating in the avatar program. care.coach does not require a copy of this document.



Resources

Take a quick look at the resources and data that are available with our service.



Power BI

p. 16

- Customizable data pull
- Participant specific data
 - Interactions
 - Task plans
 - Falls data
 - ER escalation



IDT Integration

p. 17-23

- IDT focused uses
- Fall prevention
- ER utilization
- Center initiatives
- Customized protocols



24/7 Customer Support

p. 24

- Technology and software help
- Updating reminders
- After hours escalation

Power BI Data

Data is important to track utilization and validate the service that is being provided to your participants. With that in mind, care.coach utilizes **Microsoft Power BI** reports to provide an interactive dashboard with your program's data. Each customer receives complementary sure, **HIPAA** compliant Power Bi licenses.

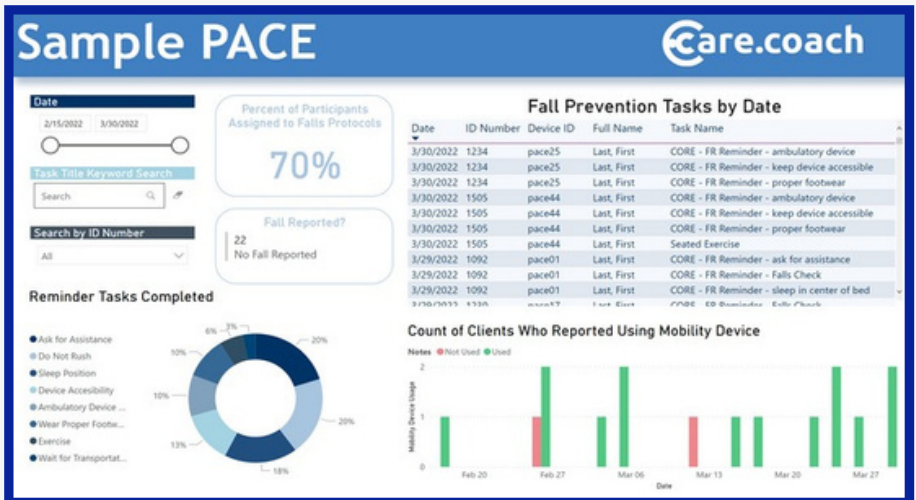


Data Includes:

- Utilization & device tracking
- Interactions & task plans
- Phone & email escalations
- QI project specific reporting
- Care summaries
- Video Visit logs

How to Access:

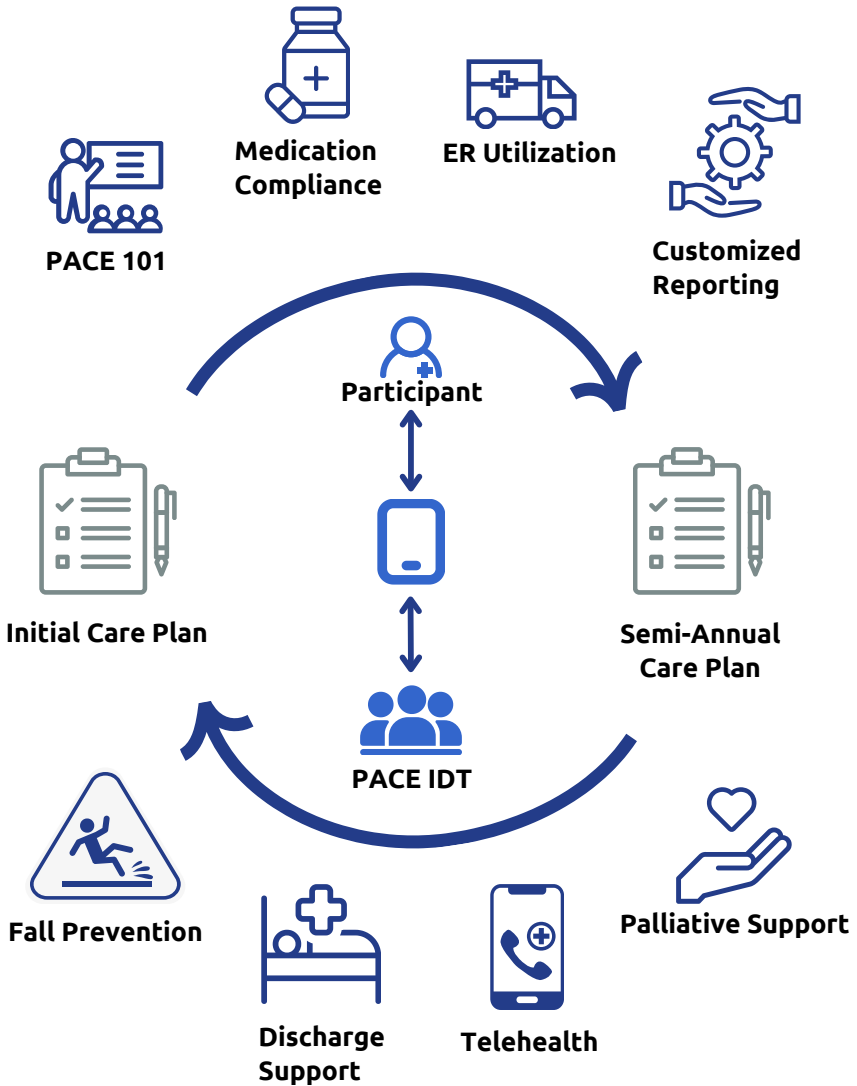
To request a secure license, speak with your **Customer Success Executive**. Once request has been granted, a secure link will be sent to your email to access the interactive reports.



IDT Integration:

Prioritization & Targeted Approaches

We support compliance through fully integrated service delivery.



Discipline Specific Uses

The Avatar and Video Visit applications allow you to **customize interventions** to assist in meeting **care plan goals**, facilitate "outside of the box" approaches for an individual participant's **needs** and/or support staff **efficiency**. Below are a few examples of how we are currently supporting PACE initiatives across the country.



Pharmacy:

Step by step medication reminders, delivery confirmation, escalations for non-compliance



Home Care:

Homecare tasks completion verification via avatar



Clinic:

Vaccination drive support and in-home triage



Rehab:

Remote groups and restorative programs



MSW:

Wellness calls, caregiver chats



Behavioral Health:

Support groups, crisis mitigation



Dietitian:

Acquiring grocery orders, dietary education videos, weight tracking



Transportation:

Center day and appointment cancellation notification



Recreation:

Virtual activity calendars and remote PAC attendance



Administration:

HOS-M survey support, center announcements and closure.



Quality:

Interventions supporting KPIs

Fall Prevention Programming



care.coach provides an effective solution to mitigate the number falls and the long-term impact falls have on your participants and your organization. This solution provides the flexibility to target a subset of your census or provide a **program wide** fall prevention initiative. Check out the following options to formulate your approach to improve this challenging KPI target.



Exercise Programming:

- Otago exercise program
- Standing exercises
- Seated exercise
- Custom-built exercise offerings



Ongoing Fall Prevention Support:

- Fall prevention protocols
- DME reminders
- DME tracking
- Falls checks
- Falls discovery with escalation



Data Collection:

- Falls discovery and checks
- Exercise data
- DME usage
- Task and reminder completion



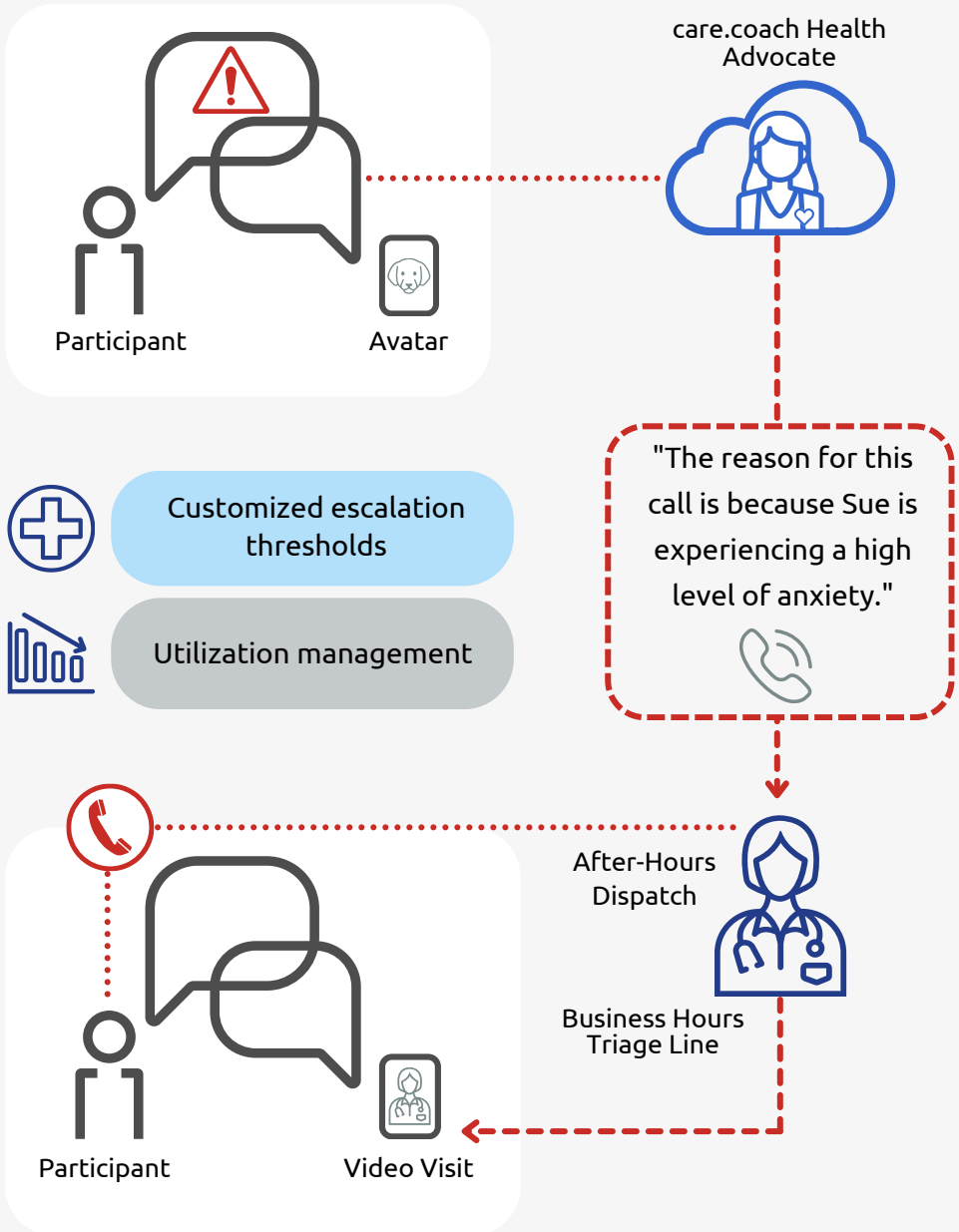
Method of Delivery:

- Avatar initiated and led
- Therapist led video visit groups

ER Utilization

We help the IDT shift from reactive to **proactive**.

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Customized escalation thresholds



Utilization management

Center Initiatives

The care.coach Avatar and Video Visit applications mitigate communication barriers and can be used to relay pertinent information to your participants, while capturing confirmation of receipt. This customizable capability is able to supply information to **all participants** with a device or **selected individuals**. Below are a few examples of how we are supporting center initiatives and communication.



PACE 101 Education

Center Closure Announcements



Emergency Response Information

HOS-M Survey Support

Vaccination Drives



Utilization Management Efforts

Increasing Participant Satisfaction



Hospital Readmission - Discharge Support



Palliative Care Support

Caregiver Chats and Education





Encouraging Self-Management

Our platform utilizes predictive analytics and AI/ML to leverage clinical guidelines and provide health coaching based on **personalized** conversations and protocols that aim to support individuals to live independently, better **self-manage** and mitigate healthcare risks.

The avatar enrollment process includes asking questions to help determine which **CORE protocols** will be assigned to each member. These protocols help personalize each member's experience to best help them. We can also include **additional** protocols according to each member's needs.



care.coach CORE protocols

Heart Failure
Hypertension

Pneumonia

Depression

Diabetes

Hydration

Fall Risk

COPD

Substance Abuse

Comprehensive Care Plan Support

Diabetes Core Protocol:
Diabetes specific health coach and inquires guiding healthy decision making.



Sue, female, 78 y/o
Struggling to manage her Type II Diabetes



PACE 101:

Getting her started off on the right foot with care planning and PACE guidelines

Exercise programming to assist in controlling her blood sugar levels and promote a healthy lifestyles.

Participant **personal reminders** to cue her activities associated with her husbands health.

Audiobooks for her continued love of romance novels.

Telehealth assessment when she is unable to attend her clinic appointment due to her husband's needs.



Medication Compliance:

- Reminder to check BS levels before breakfast and dinner.
- Reminder and guidance to appropriately administer her Novolog based on her BS value and recommendation of her doctor provided sliding scale chart.

Escalations to triage or after-hours dispatch when needing education, med refills, or BS values outside of normal limits.

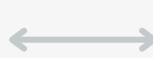


Appointment reminder for upcoming endocrinology appointment.

24x7 Customer Support

Customized comprehensive support, for any situation.

- Dx specific protocols
- Medication reminders
- Appointment reminders
- Health coaching
- Alerts and escalation
- Fall prevention protocols
- Exercise programming
- Transportation reminders
- Engagement
- Companionship and fun



Enrollment Form



24/7 care.coach support team



24/7 In Home Support



We are here to help!

care.coach Support Team

support@care.coach

1.855.437.4569 ext. 1

When to contact:

If you are experiencing any technical difficulties, need changes to an account, need video visit access, Power BI troubleshooting, or immediate participant assistance.

care.coach Customer Success Executive: Eric Warden

ericw@care.coach

856.448.3537

When to contact:

If you are experiencing issues with our support team, billing concerns, or discussions on new projects.

Frequently asked questions



Is the device always on and listening?

No, only when the avatar is partially or fully awake. Privacy matters to us so when the avatar is asleep, it cannot hear or see anything. You can always ask the avatar for privacy by telling it to go to sleep.



Does the device need WiFi connection?

No WiFi is required. The device comes with embedded AT&T or Verizon internet connections. If you are experiencing a delay in your service, please contact our technical support team for assistance.



Where is all the information going?

All data is on a **HIPAA-secured platform**. Interactions are documented for monitoring & review.



Is the avatar available 24/7?

Yes! Clients can pet the avatar any time of day and the human-powered avatar will wake up to interact.



What happens if the device breaks or I have technical issues?

If the equipment breaks or you have any issues, technical support can help. Technical Support can be reached 24x7 at **1-855-437-4569 ext 1** or **support@care.coach** .



How do I get access to the Video Visits platform?

Send an email to the Support Team at **support@care.coach** with your name and email and we will help you get set up for Video Visits.



How much does it cost?

Our pricing ranges based on the **type** of account, installed care.coach **services**, and program design. Please contact care.coach support for additional information.



Can I take with me when I leave the house?

Avatars are meant to stay at home near your favorite spot in the house, like a recliner or in the kitchen. They do not work walking around like a mobile phone.



How do I order more devices?

For corporate customers, please contact your **Customer Success Executive** to request additional devices.



What happens at the end of the program?

As the program ends, you will receive contact from care.coach with instructions on how to **return your avatar**. We'll also ask you to share some quick **feedback** on your experience with care.coach to ensure ongoing satisfaction with other members. The avatar will then go to help another member. The goal is to help as many members stay in control of their health after a hospitalization as we can.



care.coach technical support

855.437.4569



care.coach technical support

855.437.4569

Monday – Friday

9 a.m. – 5 p.m.

Central time