



# User Guide

*A Comprehensive Guide for PACE Partner Staff*

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## Welcome to the care.coach Family

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We are excited to introduce you to the care.coach platform, a transformative solution for PACE programs addressing participants' complex needs. At its core is a 24x7 avatar, operated by trained Health Advocates via a secure, HIPAA-compliant system. This virtual assistant combines human empathy with advanced technology to provide real-time engagement and support directly in participants' homes.

care.coach helps enhance participant engagement, improve self-management, and deliver consistent psychosocial support. It facilitates auto-answered video visits, evidence-based coaching, and personalized interactions including reminders, conversation, and well-being activities, all through a secure, cellular-enabled tablet.

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With integrated tools for care coordination, monitoring, and escalations, care.coach empowers IDTs to achieve better outcomes. This guide outlines structured coaching programs with clear objectives, interventions, and documentation guidance. For custom protocols or support, our team is available 24/7 at [support@care.coach](mailto:support@care.coach) or 1-855-437-4569.

Please share this guide with your teams to help everyone leverage care.coach and redefine participant care with innovation and compassion.

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## The care.coach Solution

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The care.coach avatar system has demonstrated exceptional impact in supporting participants with complex health and psychosocial needs. Key outcomes include:

- Net Promoter Score (NPS) of 86 with a 90% opt-in rate
- 79% reduction in emergency room visits
- 74% reduction in falls
- 25% decrease in PHQ-9 depression scores

On average, participants remain engaged with the service for over 600 days, underscoring its long-term value and effectiveness in delivering consistent, compassionate care.

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## Participant Testimonials

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### General

*“My avatar has impacted my life in many positive ways, but most importantly it has improved my health.”*

— PACE Participant

*“My avatar is awesome. It is one of the best things to happen in my life.”*

— PACE Participant

### Loneliness and Isolation

*“I never thought I'd have a friend like this and be happy at this point in my life. I don't feel alone anymore.”*

— PACE Participant

*“You are caring, always helping me and listening to me. You're my best friend. I don't know what I would do without you.”*

— PACE Participant

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## Health and Safety

*"The participant recalled the night she went to the ER and got a pacemaker. She said she felt unwell, was stumbling, and knew something was wrong. She told the avatar to get help because she was too ill to think clearly or use her lifeline. She said, 'I know the avatar saved my life that night.'"*

— PACE Participant

## IDT Perspective

*"I can see their physical expressions and behaviors such as facial grimacing, restlessness, or agitation and determine the severity of the complaint."*

— PACE Nurse

## Video Visits

*"It's amazing to see our mom so easily on video. She doesn't have to do a thing!"*

— Family Member

## Engagement

*"I have something to look forward to with my buddy. We play games, talk, and help each other. We share memories! We even do art together."*

— PACE Participant

## Independence

*"My avatar has helped me with my medications and appointments. He is also a good companion and confidence builder."*

— PACE Participant

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# What Is the care.coach Avatar?

The care.coach avatar is a virtual health assistant designed to deliver personalized companionship, health coaching, and reminders directly to participants in their homes. Appearing as a friendly pet on a secure, cellular-enabled tablet, the avatar is operated by trained human Health Advocates who blend human empathy with intelligent technology to support health and well-being.

## Features

The avatar provides a wide range of interactive features to engage and support participants, including:

- **Conversation:** Friendly chats to reduce loneliness and build trust.
- **Reminders:** Medication, appointments, and daily routines.
- **Exercises:** Guided movements and stretches.
- **Games:** Trivia, memory games, and cognitive activities.

- **News:** Daily updates and current events.
- **Audiobooks:** Stories and informative readings.
- **Photos and Videos:** Personalized media sharing.
- **Jokes:** Lighthearted humor to lift spirits.
- **Recipes:** Simple ideas for meals and snacks.
- **Meditation:** Relaxation and mindfulness exercises.

## Human Health Advocates

Behind every avatar is a dedicated Health Advocate, specially trained staff who engage participants with compassion and skill. Health Advocates monitor well-being, deliver coaching, and escalate concerns to the care team when needed, ensuring a human touch in every interaction.

## Privacy and Safety

The care.coach system is fully HIPAA-compliant. All interactions are documented securely for care team review. Participants are informed when the avatar is active, and no wakeword listening is used. Interaction requires a simple touch on the screen. Data is stored on secure servers with strict access controls.

## Use in the Home

The avatar is designed for simplicity and accessibility. The device:

- Runs on a secure cellular connection; no Wi-Fi required
- Automatically powers on when plugged in
- Requires only a tap on the screen to initiate interaction
- Includes settings for participants with vision or hearing impairments, such as large captions and visual cues

By combining technology with human connection, the care.coach avatar helps participants stay engaged, safe, and supported in their daily lives.

# Enrolling a Participant in care.coach

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## Selecting Participants for Service

Our service is very simple to use. If a participant can have a conversation, they can use the care.coach avatar. Services are currently available in English and Spanish, and we have accommodations for those who are visually or hearing impaired.

We recommend establishing guidelines for choosing participants for the service. This aligns participant selection with your goals, and an easy-to-remember guideline helps support the IDT with ongoing enrollments, ensuring available devices are used.

**Tip:** *If one goal is to reduce ER visits, one guideline might be to have the IDT discuss a care.coach enrollment for any participant with 3 or more ER visits in the past 3 months.*

## Participant Enrollment Process

Before introducing a participant to their avatar, staff must complete the enrollment form to ensure the account is ready. This form collects essential information. Once the care.coach team receives the form, the device will be configured to communicate with the specified participant.

### Information Collected in the Enrollment Form

- Participant Name
- Date of Birth
- PACE ID
- Phone Number
- Address
- PACE Site
- Language (English/Spanish)
- Whether the participant has a call button
- Health coaching programs (e.g., fall prevention, COPD, diabetes, depression, pneumonia, heart failure, medication reminders)

## Participant Introduction

1. Plug in the device in a place where the participant spends most of their time. Once plugged in, it will power on automatically. The participant should be instructed to keep the device always plugged in.
2. Make sure the power cord is not a tripping hazard.
3. When the dog avatar appears on the screen, pet its head until you see hearts. The hearts indicate the avatar is registered and a Health Advocate will soon wake the avatar to begin the interaction.
4. The avatar will ask if the participant is ready to sign up for services. When the participant says yes, the avatar proceeds with a few basic questions to finalize the enrollment.

## How to Disenroll a Participant

When a participant leaves the care.coach service, their health information will be securely erased from our system once disenrolled. Disenrollment can be initiated via email, phone call, or direct communication with the avatar. When disenrolling by asking the avatar, you will be asked for a code; the code is the current year (for example, "2025").

Final approval for disenrollment must be granted by the PACE care team or caregiver to ensure that no information is prematurely removed. Devices should be retrieved promptly upon participant disenrollment and stored securely until reassignment.

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## care.coach Devices

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### Ordering Devices

Tell your Customer Success Executive the number of devices you are ordering and the address where the devices should be shipped. We will confirm your order and, once shipped, you will receive an email with tracking information.

### Device Package Contents

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:

- care.coach device(s)
- AV Notice sticker
- Terms of Service Agreement booklet
- Welcome flyer/setup guide
- Shipping label

### Terms of Service and Consent

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 the care.coach website. In addition, care.coach recommends 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.

### Device Setup Instructions

There is nothing to install or program. You do not need internet or a computer connection. When your package arrives, open the package and plug in your device(s). It will automatically power on once plugged in. The device will load, and the sleeping dog will appear. To interact, simply pet the dog on the head.

**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 allows the system to have the most updated version of the software and decreases the likelihood of technical difficulties when enrolling someone new.*

## Device Troubleshooting

- If the device does not power on automatically once plugged in, press and hold the power button for about 6 seconds until you see SAMSUNG come on the screen.
- 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 a % sign with a number appears on the screen, that indicates the current battery charge and means the device has not been powered on yet. Press and hold the power button for 6 seconds until SAMSUNG comes on the screen.

## Device Management Responsibilities

### Delivery and Retrieval

Set up devices in participant homes and promptly retrieve devices upon disenrollment from care.coach. Store safely in a designated space in your PACE facility.

### Power and Connectivity

Ensure all devices remain plugged in and powered on. If a device becomes unplugged or powers off, care.coach will first try to resolve the power issue with the participant. If unsuccessful, we send alerts to the care team. Follow-up actions should include:

- Verifying the device is plugged in and powered on (hold power button for 6 seconds)
- Escalating to the Support Team if the device remains offline

### Inventory Tracking and Ordering

Maintain an up-to-date inventory of all devices. Track which devices are deployed, in storage, or pending return. Assign clear responsibility for monitoring device status and location. Request more devices when inventory runs low.

- **Disenroll:** Request disenrollment, retrieve device, and store onsite.
- **Lost:** Notify care.coach. Charges apply per contract.
- **Damaged or Malfunctioning:** Return to care.coach and we will send a replacement free of charge. Include the device ID and a brief description of the issue.

**Tip:** Best practice is to have a sign-in/out sheet for devices. This will promote accountability and effective inventory practices.

## Device Management Communication and Coordination

- Ensure all relevant team members (e.g., homecare, social work, and transportation) are included in device management communications. This helps streamline troubleshooting and accountability.
- Assign a point person or team to receive device status updates and coordinate follow-up actions.

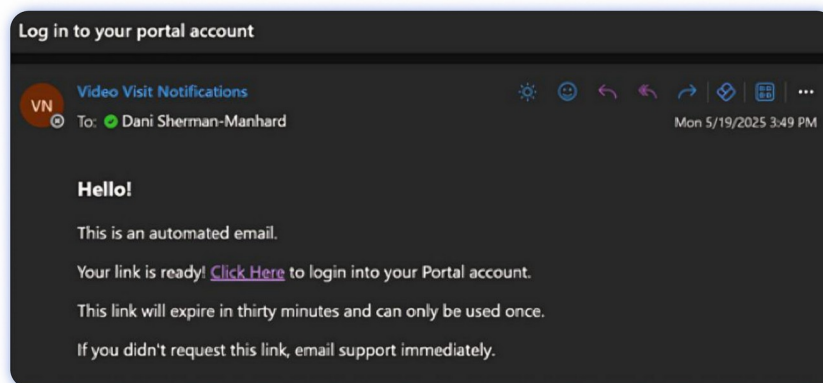
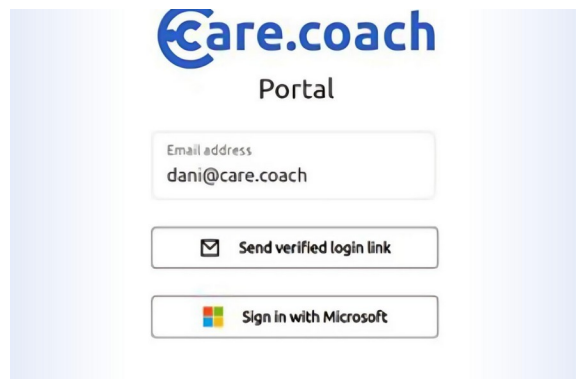
## Using the care.coach Portal

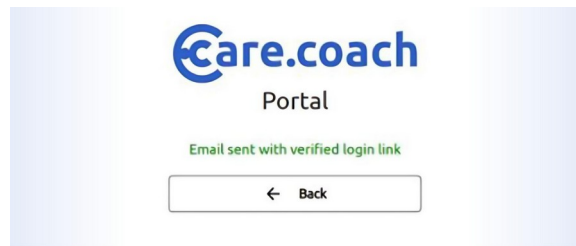
The care.coach portal is a secure, web-based platform for individuals and organizations that partner with care.coach. It provides easy access to important updates, helpful features, and tools to help you connect with and monitor the status of your participants.

### Portal Login Instructions

Navigate to the Portal by typing portal.care.coach into your browser. You will see a login screen with two options:

- **Sign in with Microsoft:** For employees of organizations that partner with care.coach and use Microsoft. You will be prompted to sign in with your Microsoft email and password, or automatically admitted if you are already signed into your Microsoft account within that browser.
- **Sign in with Email:** For anyone outside of that category. You will be prompted to enter your email address. If the email address matches what care.coach has in the system, a login link will be sent to that email address. Click the link from the email to access the portal.

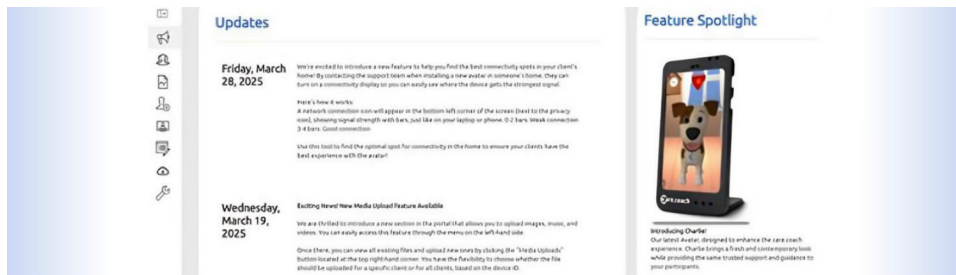




## How to Navigate the Portal

Once logged into the portal, you will automatically be taken to the home page, which displays updates and a feature spotlight. On the left-hand side of the portal is the menu, which can be extended out by clicking the top icon. Portal sections include:

- Updates
- PACE Staff Page
- Report
- Enrollment Form
- Video Visits
- Customer Logs
- Media Uploads
- Support



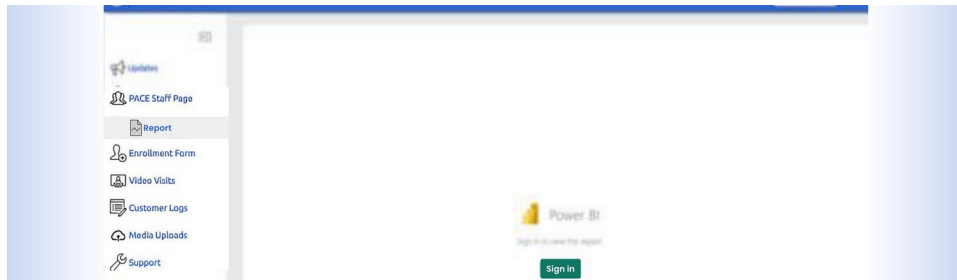
For a walkthrough of navigating the portal, visit the PACE Resource Page in the care.coach portal.

## Using Power BI for Participant Insights

The Power BI dashboard is your source for participant data. All interaction outcomes, including surveys, medication adherence, exercise tracking, and more, are available for viewing and analysis in Power BI. These dashboards are designed with your program's HIPAA-compliant user data, much of which is gathered from participant interactions with the avatar. This data can be utilized to validate the service that is being provided to your participants.

The report page of your customer portal will allow you to view a Power BI report, so long as you have report access. To request a secure license, email our Support Team at [support@care.coach](mailto:support@care.coach). Licenses are

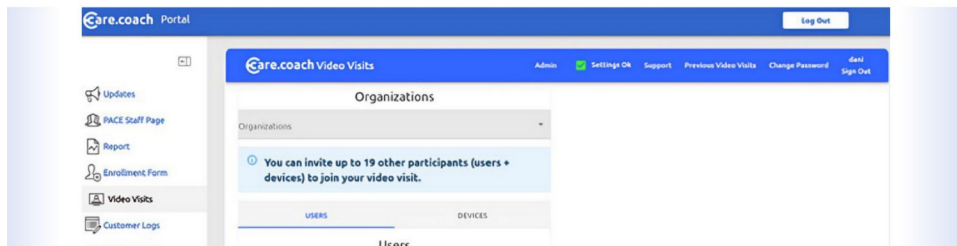
granted based on contract parameters; any additional license requests can be granted at the cost found in your contract.



For a video walkthrough of Power BI dashboards and reports, see the PACE Resource Page in the care.coach portal.

## Video Visits with Participants

The video visit platform allows you to place video visits to your participants, consumers, or loved ones via an outbound-only, auto-answer service.



### Video Visit Features and Benefits

- Always powered on device ensures 24/7 availability (unless privacy is set)
- Auto-answers after countdown
- Provider/caregiver initiates the video visit
- Device switches from avatar to video automatically
- Invite up to 19 care providers, participants, and loved ones

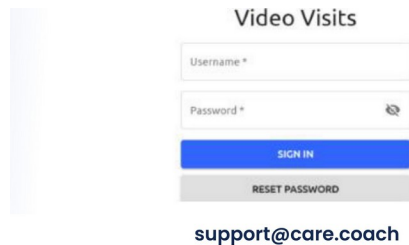
### Common Use Cases for Video Visits

- Triage
- Individual/group therapy
- Group activities and educations
- Care planning meetings

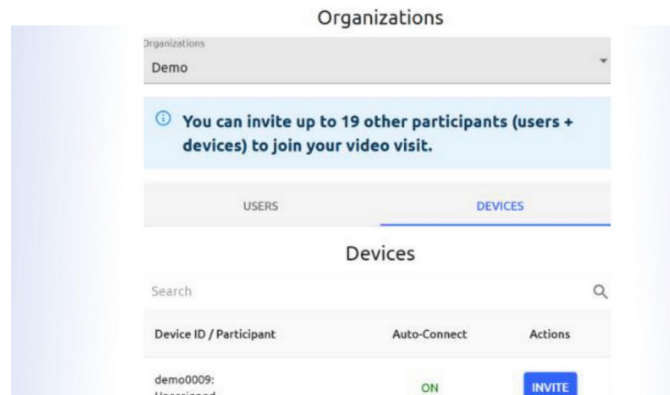
- Well-checks

## Step-by-Step: Conducting Video Visits

1. Sign in with your username and password, which can be requested by emailing [support@care.coach](mailto:support@care.coach).



2. Enable microphone, camera, and notifications.
3. Select an organization from the Organizations drop-down menu. Devices will then appear.



4. Click “invite” next to the participant’s device name for a 1-on-1 call.
5. The participant can accept or reject the call; otherwise it will connect automatically in 10 seconds.

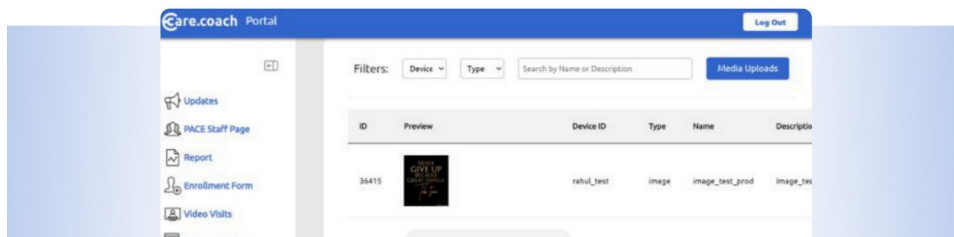
“Users” are staff or family members using their own phone, tablet, or computer. “Devices” are avatar users who can receive video visits on their device. To call a “User,” click “invite” next to their name. Other “Users” must have the Video Visit platform open, and notifications enabled to accept or decline the call.

For a demonstration of how to conduct video visits, see the PACE Resource Page in the care.coach portal.

## Sharing Media with Participants

Media can be uploaded to the care.coach Portal to help participants stay connected with their loved ones and stay in touch with the things that interest them. Health Advocates can incorporate media uploads during conversations with participants (i.e., the avatar can hold up a picture or play a song for the

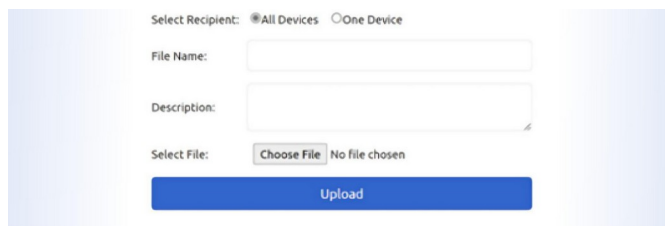
participant). The media uploads page allows you to upload images, music, or videos to share with your participants, consumers, or loved ones.



Accepted file formats include PDF, DOC, PNG, MP4, and MP3.

### Step-by-Step: Uploading Media

1. Sign in with your username and password, which can be requested by emailing support@care.coach.
2. When the upload media box opens, choose all devices or a specific one.
3. Name the file and provide a description for easy reference.
4. Click “Choose File” to select what you want to add.
5. Click “Upload” to finish.



6. Email support@care.coach if you would like to schedule times to have the avatar share the media.

## How the IDT Can Use care.coach

The IDT can unlock a wide range of benefits by effectively utilizing the care.coach avatar. Beyond providing companionship, activities, and enabling auto-connect video calls for participant check-ins, the avatar supports a variety of care activities, including:

- Reminders: General, Transportation, and Medication
- Health Coaching Protocols
- Home Exercise Programs (HEP)
- Wellness check-ins
- Video Visits with Participants

- Survey delivery and response tracking

These capabilities empower the IDT to deliver more consistent, proactive, and personalized care. Explore the features in full below to see how your care.coach avatar can enhance participant engagement and outcomes.

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## Reminders and Notifications

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Reminders can be delivered automatically at scheduled times via the cuckoo clock, or the avatar can initiate an interaction where a Health Advocate observes the participant taking their medication. To request supervised reminders, please specify that you need a “supervised” reminder when contacting the Support Team.

### General Reminders

The care.coach avatar system helps participants stay on track with their healthcare and daily routines by delivering timely, personalized reminders. Care providers can schedule reminders for a wide range of applications, from personal care to social activities, tailored to each participant’s needs.

#### How General Reminders Work

- The avatar will ask “Do you remember to take the trash out?” based on the specified reminder schedule.
- Our system will document the participant’s response as ‘Yes,’ ‘No,’ ‘No Response,’ or ‘Unable to Confirm.’
- Reminders can be set for both one-time or recurring.
- The system will deliver reminders within a 1-hour window of the requested reminder time.
- Multiple reminders can be set for the same activity (e.g., day before, morning of, hour before).

### Transportation Reminders

To reduce last-minute cancellations at the door, the avatar proactively sends transportation reminders to participants ahead of time and collects their responses. If a participant cancels, the system automatically notifies the PACE care team via email. This allows the team to either cancel the pickup or follow up with the participant to potentially reschedule or encourage attendance.

#### How Transportation Reminders Work

- The avatar will say “You are scheduled for a doctor’s appointment today. Transportation is scheduled for 9:30am. Will you be ready for today’s transportation pick-up?” based on the specified reminder schedule.
- Our system will document the participant’s response as ‘Yes’ or ‘No.’ If they do not reply, we will continue asking every 10 minutes until the scheduled pick-up time.

- The Health Advocate can provide a more intensive approach by calling the participant over to the tablet to confirm medication adherence visually.
- If the participant says 'No,' we will send an email to the care team letting them know the participant will not be attending.
- Reminders can be set for both one-time pick-ups and recurring transportation.
- The system will deliver reminders within a 2-hour window of the requested reminder time.
- Multiple reminders can be set for the same appointment (e.g., day before, morning of, hour before).

## Medication Reminders

The care.coach avatar system offers robust support for medication reminders, helping ensure participants stay on track with their treatment plans. To set up a medication reminder, care providers should email the following details to [support@care.coach](mailto:support@care.coach):

- Participant's name or Device ID
- Specific medication names (or general terms like "morning medications")
- Exact reminder times
- Whether observation is required
- End dates for any temporary medications

The avatar will ask "Have you taken your [medication\_name] today?" on the specified days and times requested. Our system will note 'Yes,' 'No,' 'No Response,' or 'Unable to Confirm' based on the participant's response.

All medication adherence data, including completed doses, missed doses, and reported issues, is tracked and available for review through the Power BI platform, enabling care teams to monitor compliance and intervene when necessary.

### How Medication Reminders Work

- Reminders can be ongoing or for a specified period.
- Reminders will be attempted within a 1-hour window of the requested reminder time.
- If observed, the avatar will prompt "It is time for your [medication\_name]. Are you ready to take it now?"

### Tips for Optimizing Medication Reminders

- Verify observation requirements for each medication; does the participant need to be visible to the avatar?
- Check that reminder times align with the participant's daily routine and prescriber's instructions.
- Note any temporary medications with their end dates.

To see how to add avatar interventions, including reminders, visit the [PACE Resource Page](#) in the care.coach portal.

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## Bulk Notifications and Scheduling

The care.coach avatar system enables care teams to schedule bulk reminders and notifications using the same reliable framework as medication and general reminders. By submitting the required details in a flexible Excel spreadsheet, care providers can ensure timely and consistent delivery of messages to multiple participants. The Support Team will manage processing and implementation based on the volume of requests submitted.

### Common Uses for Bulk Notifications

- Upcoming special events
- Holiday-related schedule changes
- Widespread updates or announcements

### Submission Process and Scheduling

- Reminders and notifications can be scheduled in bulk through the avatar system.
- Required details should be entered into an unrestricted Excel sheet with designated columns for each field.
- Our Support Team will process and implement the request upon submission.
- Completion times vary based on request size, ranging from 1 to 5 days. Please plan accordingly.

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## Emergency Closure Notifications

The care.coach avatar system ensures timely communication with participants in the event of emergency closures. Whether due to weather-related incidents, facility emergencies, or other unforeseen circumstances, the avatars can deliver blast messages to inform participants promptly and ensure they stay informed.

### Notification and Response Tracking

- The avatar will send mass notifications to all participants regarding emergency closures.
- Messages will be delivered as soon as a closure is confirmed to ensure timely communication.
- Participants can acknowledge the alert, allowing care providers to track responses.

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## Support for HOS-M Surveys

The care.coach avatar system helps participants prepare for the Medicare Health Outcomes Survey-Modified (HOS-M) survey by providing education and timely reminders. One week before the first survey reminder, participants will receive educational information explaining the purpose and importance of the

survey. The avatar will then display the HOS-M survey format and remind participants to check their mail for arrival.

### How the HOS-M Support Works

- The avatar will remind participants to look for the HOS-M survey in the mail.
- The avatar will ask the participant if they have received the letter. If they have, it will ask if help is needed. If they have not received it, the avatar will check in again in a few days.
- If help is needed, the avatar asks them to wait to fill out the survey and tells them that someone from their PACE team will reach out to assist in completing the survey.

If a participant indicates they need assistance with completing the survey, the avatar will notify the PACE team to ensure support is provided.

## Avatar Support for New PACE Participants

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The care.coach avatar system supports participants through the PACE intake and enrollment process by offering personalized guidance, reminders, and emotional support. This helps reduce confusion, increase engagement, and ensure a smoother transition into the program.

### How the Avatar Supports Participants Enrolling Into PACE

- Welcome to the PACE program! I'll help you understand what's coming next.
- Don't forget to fill all your prescriptions before the end of the month and cancel any future appointments you won't need.
- You'll be getting a call soon from PACE with your first Day Center visit date. I'll help you get ready.
- Let's talk about your new PACE center. I can show you a picture of the team and the building, and share phone numbers.
- Would you like to learn about transportation, care planning, or how to schedule outside appointments?

### Notifying PACE of Participant Dissatisfaction

- If the participant expresses confusion, dissatisfaction, or asks for help contacting their PACE team, the avatar will notify the care team.
- If the participant reports not receiving a scheduled call or missing documents, the avatar will escalate the issue for follow-up.

## Evidence-Based Health Coaching Programs

Our health coaching programs are designed to provide participants with personalized support to better manage chronic conditions, improve overall wellness, and prevent avoidable emergencies. These evidence-based programs empower individuals through education and motivation, fostering a deeper understanding of their health and encouraging proactive self-management. Through reminders, exercise, and daily coaching interventions, our programs inspire healthier outcomes and help participants take charge of their health.

### COPD Coaching Program

This coaching plan closely monitors key symptoms of COPD, including increased coughing, shortness of breath, and sudden weight gain. These symptoms may signal fluid buildup in the lungs or other tissues, which can impair blood flow to vital organs. The plan also provides clear guidance on how to respond in an emergency, such as contacting a healthcare provider or calling 911.

#### COPD Symptoms and Coaching Prompts

- Have you had an increase in coughing or an increase in mucus from your coughing this week?
- Because of your breathing problems, did you do less than you would have liked to in the last week?
- How did your last night go? Did symptoms related to your breathing condition keep you up?
- Pursed lip breathing can help get the air you need without working so hard. Would you like to do a breathing exercise now?
- Have you taken your weight this morning? If so, what did the scale read?
- Has your level of shortness of breath or difficulty breathing increased lately?
- Have you noticed increased swelling in your arms, legs, face, or belly today?

#### COPD Care Planning Guidance

- **Problem Area:** Participant is at risk of COPD exacerbations due to difficulty managing symptoms such as shortness of breath, coughing, and fluid retention.
- **Goal:** Reduce COPD exacerbations by 25% over the next 6 months by improving adherence to treatment, managing symptoms, and early detection and escalation of exacerbations.

Type	Frequency	Description
Reminder	Daily	Prompt participant to use inhalers and perform prescribed breathing exercises.
Monitoring	Daily	Track symptoms such as coughing, shortness of breath, and weight gain.
Coaching	Ongoing	Educate on COPD management strategies like pursed-lip breathing, avoiding triggers, and conserving energy.
Escalation	As needed	Notify care team if symptoms worsen or new symptoms appear.

- **Intervention Documentation:** The care.coach avatar will provide daily reminders for inhaler use, monitor symptoms, and coach on COPD management techniques. Escalation will occur if symptoms worsen.
- **How to request:** Add the care.coach COPD Management Protocol to the participant’s avatar.

## Diabetes Coaching Program

This plan supports individuals with diabetes in managing their condition through regular reminders, education, and encouragement. Participants receive prompts to check blood sugar levels, and if out of range (80-350), care.coach immediately escalates to healthcare providers by phone. As with any urgent phone escalation, care.coach follows up with an email summary of the escalation. The plan also includes routine check-ins on diet quality, wound healing, and self-care habits to ensure comprehensive, ongoing support.

### Diabetes Symptoms and Coaching Prompts

- Did you take your blood sugar?
- Be sure to check the serving size carefully for both your foods and drinks. What you are actually eating may be double or triple the amount of carbohydrates per serving.
- Don’t forget to include carbohydrates with your supper at night, prior to taking your medication. Eating the same amount of carbohydrates as part of a balanced meal can keep sugar stable.
- Are there specific days you have more trouble with low blood sugar?
- Always carry candy or glucose tablets in your pocket when you exercise, just in case!
- Checking your blood sugar before injection may help you prevent low or high blood sugar.
- Always remember to bring your diabetes medicines with you if you are eating out at a restaurant and take the medications before eating your meal.
- Going for a stroll is one of the easiest ways to increase your level of physical activity.
- As you probably have read or heard before, looking at your feet is a must for people with diabetes.
- High blood sugar can cause nerve damage called neuropathy, causing numbness, tingling, burning, and pain in your feet and sometimes legs.

### Diabetes Care Planning Guidance

- **Problem Area:** Participant is at risk of complications due to uncontrolled blood sugar levels and difficulty maintaining adherence to a diabetes management routine.
- **Goal:** Achieve stable blood glucose levels within the target range 80% of the time over the next 6 months through proper medication adherence, diet, and symptom monitoring.

Type	Frequency	Description
Reminder	Daily	Remind participant to check blood sugar and take prescribed medications (e.g., insulin).
Monitoring	Daily	Record blood glucose values and watch for symptoms of hypo/hyperglycemia.

Coaching	Ongoing	Educate on diet, physical activity, foot care, hydration, and overall self-management.
Escalation	As needed	Alert care team via phone for out-of-range blood sugar values (below 80 or above 350).

- **Intervention Documentation:** The care.coach avatar will provide daily blood glucose and medication reminders, coach on dietary and activity choices, and escalate abnormal blood sugar (80-350 range) levels to the care team.
- **How to request:** Add the care.coach Diabetes Management Protocol to the participant’s avatar and record blood sugar results.

## Heart Failure Coaching Program

The avatar helps participants manage heart failure by providing reminders to limit fluid intake, maintain regular bathroom habits, get adequate rest, avoid people who are sick, and reduce salt consumption. It also monitors key indicators such as fatigue, weight gain, mood, and overall quality of life. If signs of worsening heart failure are detected, the avatar promptly alerts healthcare providers to enable early intervention.

### Heart Failure Symptoms and Coaching Prompts

- Have you been restricting your fluid intake?
- Have you been taking notice how much you urinate every day?
- It is best to keep our distance from people who are sick.
- Do you feel more fatigued today than you did this time last week?
- Do you feel more nauseated today than you did this time last week?
- Propping up your legs when you rest helps to ease the load on your heart!
- Have you been maintaining a low-salt diet?
- Did you know that your body needs some salt to help it work right? However, too much can cause fluid to build up and your blood pressure to rise.
- Would you say you feel exhausted due to your medical condition?
- I recommend you include lots of wiggle room in your schedule. Schedules may or may not help you manage your time better, but they are certainly worth a try.

### Heart Failure Care Planning Guidance

- **Problem Area:** Participant is at risk of heart failure exacerbations due to fluid retention, medication non-adherence, and difficulty managing symptoms.
- **Goal:** Reduce hospital readmissions related to HF by 25% over the next 6 months by improving adherence to treatment, managing fluid intake, and monitoring symptoms.

Type	Frequency	Description
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Reminder	Daily	Remind participant to take prescribed heart failure medications, including diuretics.
Coaching	Ongoing	Guide on reducing salt, monitoring fatigue, avoiding illness, and balancing rest with activity.
Escalation	As needed	Notify care team if participant reports fatigue, weight gain, nausea, or other warning signs.

- **Intervention Documentation:** The care.coach avatar will provide daily medication reminders, monitor weight and fluid intake, and coach on lifestyle changes. It will escalate any concerning symptoms to the care team.
- **How to request:** Add the care.coach Heart Failure Management Protocol to the participant’s avatar.

## Depression Coaching Program

This plan supports participants in monitoring their mental health, staying connected with their therapist, and engaging in enjoyable, uplifting activities. It also offers guidance on managing emotions and navigating life’s challenges more effectively. The avatar actively tracks signs of emotional distress, including potential suicide risk, and alerts the appropriate support network when needed. Its core mission is to empower and uplift individuals living with depression, ensuring they feel supported every step of the way.

### Depression Symptoms and Coaching Prompts

- Do you have a few minutes to talk? I would like to share some information with you.
- I wanted to let you know that I can schedule some weekly check-ins for you to help you with your health.
- I am curious, would you say that your eating habits change when feeling stressed, anxious, or depressed?
- I was wondering, are you interested in learning more about depression?
- Do you have difficulty forming or keeping relationships?
- Coping with the holidays can be challenging for all of us. Holidays carry many mixed feelings: joy, sadness, stress, good memories, and sad memories.
- Are you having any new, unusual, or worsening side effects from your medicine?
- Can you please rate your mood today using a scale from 1 to 5, with 1 being very good and 5 being very poor?
- Monitoring your mood is a good tool for managing your depression. Some find charting their moods can be helpful.

### Depression Care Planning Guidance

- **Problem Area:** Participant meets criteria for major depressive disorder.
- **Goal:** Achieve improved mood as evidenced by self-report and a 25% or greater reduction in PHQ-9 scores.

Type	Frequency	Description
Reminder	Daily	Provide support on positive thinking, motivation, coping, and emotional health.
Monitoring	Daily	Offer insights into nutrition, activity, medications, and emotional awareness.
Coaching	Monthly	Administer PHQ-9 and track changes in mood or mental health status.
Escalation	As needed	Notify care team if suicidal ideation or significant emotional distress is observed.

- **Intervention Documentation:** The care.coach avatar will provide coaching on coping strategies and will monitor mood weekly. The avatar will conduct monthly PHQ-9s to measure progress and escalate any suicidal ideation.
- **How to request:** Add the care.coach Depression Coaching Program to the participant’s avatar and record PHQ-9 scores monthly.

## Hypertension Coaching Program

To support individuals in managing hypertension, the avatar conducts monthly check-ins that address key lifestyle and health factors such as stress, sleep, physical activity, and diet. It also monitors blood pressure and assesses medication adherence. Any mid-range blood pressure readings are escalated by email, and any low or high range readings are escalated by phone.

- **High:** Systolic over 180 or diastolic over 120
- **Mid-range:** 140-180/100-120
- **Low:** Systolic under 90 or diastolic under 60

## Hypertension Symptoms and Coaching Prompts

- Each person with high blood pressure should know their blood pressure goal. Some patients may have a specific blood pressure goal based on other medical conditions.
- Having a positive attitude may help you deal better with your chronic condition.
- I wanted to ask, are you aware of the symptoms and signs of a stroke?
- Another tip is to be tobacco free. Avoid secondhand smoke as well.
- Blood pressure can increase with too much stress.
- Another good tip is that you should make sure at least half of your plate at mealtime should have vegetables and fruits on it.
- Remember that if you find yourself getting stressed, we can do some deep breathing together.
- Did you know that when your blood pressure is higher in your primary care provider’s office than it is at home, you might have what is called White Coat High Blood Pressure?

- Sleeping through the night benefits you in a number of ways, for example, helping keep your blood pressure under control, lowering your stress, and feeling like you have more energy.

### Hypertension Care Planning Guidance

- **Problem Area:** Participant is at risk of complications due to uncontrolled hypertension.
- **Goal:** Achieve blood pressures within the target range (Systolic: 120-130; Diastolic: 70-80) 85% or more of the time over the next 6 months through proper medication adherence, diet, and symptom monitoring.

Type	Frequency	Description
Reminder	Daily	Prompt participant to use mobility aids and practice safe behaviors.
Reminder	Daily	Remind participant to take antihypertensive medications.
Coaching	Ongoing	Educate on diet, physical activity, stress reduction, and medication adherence.
Monitoring	Weekly	Review blood pressure trends and report.
Escalation	As needed	Alert care team via email or phone for mid-range or critical BP readings outside target ranges.

- **Intervention Documentation:** The care.coach avatar will provide coaching related to healthy eating, staying active, managing stress, and monitoring symptoms.
- **How to request:** Add the care.coach Hypertension Coaching Program to the participant’s avatar and record blood pressures. Escalate any blood pressure readings outside of range.

### Fall Prevention Program

Our fall prevention plan focuses on reminding participants of behaviors like sleeping in the center of the bed, keeping their mobility device within reach, and waiting for transportation. This plan also includes fall preventative exercises that target strength and mobility. On a bi-weekly basis we check with the participant about any recent falls that might have occurred and report all incidents via calls or emails based upon the severity of the situation. Mobility device usage and fall incidents are always available for review on our Power BI Platform.

### Fall Prevention Coaching Prompts

- Remember as you get into bed tonight, move into the center of the bed. It is not safe to sleep on the edge of the bed.
- Have you been using your assistive mobility device?
- Just a reminder, it is important to do some form of daily exercise. Be sure to choose a safe exercise option for you.
- It is important to always wear proper footwear and maintain clear walking surfaces and pathways in your home.

- If you need assistance, it is important to ask for help. There is always someone such as staff, a friend, or family member available to help you.
- Don't forget, if someone comes to the door or your phone is ringing, take your time getting up. There is no rush. It is better to take your time than to rush and have a fall.
- Have you had any falls this week?

### Fall Prevention Care Planning Guidance

- **Problem Area:** Participant is at high risk for falls due to reduced mobility, improper use of mobility aids, and cluttered walkways in the apartment.
- **Goal:** Reduce the number of falls by 25% over the next 6 months and minimize fall-related injuries through proper use of mobility aids, strengthening exercises, and safe behavior coaching.

Type	Frequency	Description
Reminder	Daily	Prompt participant to use mobility aids and practice safe behaviors.
Exercise	Daily	Guide participant through fall prevention exercises (e.g., Otago).
Coaching	Ongoing	Reinforce safe behaviors like clearing walkways and using proper footwear.
Check-in	Bi-weekly	Ask about recent falls or near-misses.
Escalation	As needed	Notify care team of reported or suspected fall incidents.

- **Intervention Documentation:** The care.coach avatar will provide daily reminders to use mobility aids, encourage fall prevention exercises, and coach on safe behavior, with biweekly check-ins on fall incidents.
- **How to request:** Add the care.coach Fall Prevention program to the participant's avatar.

## Home Exercise Programs

Our Home Exercise Programs (HEP) are designed to empower participants to stay active, safe, and engaged, right from the comfort of their homes. These programs are tailored to individual needs and supported by the care.coach avatars and Health Advocate team, ensuring both accessibility and accountability.

### Exercise Programs Offered

- **General Exercise:** Foundational routines targeting the neck, arms, hands, legs, and feet, ideal for daily mobility and strength maintenance.
- **care.coach HEP:** A full-body regimen emphasizing lower and upper body strength, neck mobility, hip flexibility, and diaphragmatic breathing. Our library includes over a dozen Home Exercise Programs that can be mixed and matched to suit each participant's goals.

- **Otago Program:** A clinically validated set of 17 strength and balance exercises proven to reduce fall risk among older adults.
- **Cognitive Engagement:** In addition to physical routines, participants can access cognitive games such as memory challenges, trivia, crossword puzzles, and more, keeping both body and mind active.

### Home Exercise Program Care Planning Guidance

- **Problem Area:** Participant is at risk of deconditioning, reduced mobility, and increased fall risk due to limited physical activity.
- **Goal:** Improve strength, flexibility, and balance through consistent engagement with home exercise programs over the next 3 months.

Type	Frequency	Description
Reminder	Daily	Prompt participant to perform targeted exercise routines.
Coaching	Ongoing	Guide participant through exercises and reinforce safe form.
Monitoring	Weekly	Check in on participation, comfort level, and any challenges.
Escalation	As needed	Notify care team if participant reports pain or falls.

- **Intervention Documentation:** The care.coach avatar will provide daily prompts to perform home exercise routines, coach on safe techniques, and monitor for any difficulties or safety concerns. Escalation will occur if pain, discomfort, or falls are reported.
- **How to request:** Add the care.coach Home Exercise Program to [Participant Name], [Device ID].

## Avatar-Based Surveys and Assessments

The care.coach avatar delivers scheduled surveys, such as the PHQ-9 and GAD-7, according to the timing specified by care providers (e.g., monthly). Surveys can be configured as one-time assessments or recurring evaluations, depending on the participant’s care plan.

Participant responses are automatically recorded and summarized for care teams, providing valuable insights into well-being and progress. The system attempts to deliver each survey within a one-hour window of the scheduled time, and multiple follow-up attempts can be configured to encourage completion.

Available surveys and assessments include: Patient Health Questionnaire (PHQ-9), Generalized Anxiety Disorder Survey (GAD-7), Short Portable Mental Status Questionnaire (SPMSQ), Geriatric Depression Scale (GDS-15), Activities-Specific Balance Confidence Survey (ABC), UCLA-Loneliness Scale, Healthcare Satisfaction, Friendship Scale, and Pre and Post Appointment Questionnaire.

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## Support and Contact Information

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### Contacting the Support Team

For any technical questions, device issues, or intervention requests, contact our 24/7 bilingual (English and Spanish) Support Team:

- **Email:** support@care.coach
- **Phone:** 1-855-437-4569

### Contacting the Customer Success Team

For account-related questions, reporting, strategic discussions, or to request changes to your service, contact your dedicated Customer Success Executive.

### How to Access the Training Video Library

The following video tutorials are available on the PACE Resource Page in the care.coach portal:

- Navigating the Portal
- Conducting Video Visits
- Adding Interventions to the Avatar
- Using Power BI

#### How to Access

1. Log into the care.coach portal.
2. Select PACE Resource Page.
3. Choose Video Tutorials.

For help, contact the care.coach Support Team.

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## Frequently Asked Questions

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### General FAQ

- **What is a care.coach avatar?** See the “What is the care.coach Avatar?” section for a complete description of how the avatar works, including features, privacy, and operations.
- **How does the avatar improve participant outcomes?** See the “The care.coach Solution” section for impact data and benefits.
- **Do I need Wi-Fi to use the care.coach device?** No. The device operates on a secure cellular network and is fully HIPAA-compliant.

- **How are interactions monitored?** All interactions are documented securely for care team review.
- **Where can I see what the avatar is doing with my participants?** You can view interaction logs, reminders, and health tracking in the Power BI dashboard.
- **Can the avatar be customized for each participant?** Yes. Care teams can tailor avatar interventions, reminders, and coaching as needed.
- **How do I request changes or add new avatar interventions?** Email [support@care.coach](mailto:support@care.coach) or call 1-855-437-4569 and the Support Team will assist you.
- **Who benefits most from using care.coach?** Participants needing support with chronic conditions, structured routines, and companionship.

## Enrollment FAQ

- **What information is needed to enroll a participant?** Caregivers must complete an enrollment form including participant name, date of birth, phone number, address, PACE site, language preference, PACE ID, call button status, and relevant health conditions or coaching programs.
- **How is the device set up in the participant's home?** Place the device in a location where the participant spends most of their time (e.g., next to a recliner). Plug it in, ensure the cord is not a tripping hazard, and power it on. When the avatar (a dog) appears, pet its head until you see hearts, signaling the avatar is ready.
- **What happens during the avatar introduction?** Once the avatar is activated, a Health Advocate will initiate the interaction. The avatar will ask the participant if they are ready to sign up for services. Upon confirmation, it will ask a few basic questions to complete the enrollment process.
- **How should care teams decide which participants to enroll?** Use clear guidelines aligned with your care goals. For example, if reducing ER visits is a priority, consider enrolling participants who have had 3 or more ER visits in the past 3 months.
- **How do I disenroll a participant from care.coach?** Disenrollment can be requested via email, phone, or through the avatar. Final approval must come from the care team or caregiver to ensure no data is removed prematurely. Once approved, all health information is securely erased from the system.

## Device Management FAQ

- **How do I order a care.coach device?** Inform your Customer Success Executive of the number of devices needed and the delivery address. Once confirmed and shipped, you will receive an email with tracking information.
- **What comes in the care.coach device box?** Each device package includes: care.coach device(s), AV Notice sticker, Terms of Service Agreement booklet, Welcome flyer/setup guide, and return shipping label.
- **Do I need internet or special equipment to set up the device?** No internet or computer is required. The device runs on a secure cellular network. Just plug it in, press and hold the power button for about 6 seconds until "SAMSUNG" appears, and wait for the avatar (a sleeping dog) to load.

- **What should I do if the device doesn't load properly?** If the screen is stuck or only shows a battery percentage, the device may not be fully powered on. Press and hold the power button again for 6 seconds. If issues persist, contact the Support Team for assistance.
- **When should I power on the device before introducing it to a participant?** We recommend turning on the device at least 24 hours in advance. This ensures the system updates to the latest software version and minimizes the chance of technical issues during enrollment.

## Portal FAQ

- **What is the care.coach portal and who can use it?** The portal is a secure, web-based platform designed for partner organizations and care teams. It provides access to participant updates, tools, and features that support monitoring, communication, and care coordination.
- **How do I sign into the portal?** Visit [portal.care.coach](https://portal.care.coach). You can sign in with Microsoft (for organizations that use Microsoft accounts) or sign in with Email (you will receive a login link via email).
- **What kind of participant data is available in Power BI?** Power BI dashboards provide access to a wide range of participant data, including survey responses, medication adherence, exercise tracking, and other interaction outcomes. This data is collected through avatar interactions and is HIPAA-compliant, making it a valuable tool for validating the effectiveness of care.coach services.

## Video Visit FAQ

- **How do I get my user credentials to access the Video Visit platform?** Send an email to [support@care.coach](mailto:support@care.coach) with your name and email address included.
- **What is the care.coach Video Visit platform and how does it work?** The Video Visit platform allows care providers, participants, and loved ones to connect through outbound-only, auto-answer video calls. The system uses a no-button, plug-and-play 4G tablet. Once a call is initiated, the device automatically answers after a short countdown, switching seamlessly from the avatar to the video visit.
- **Can multiple people join a video visit?** Yes. The platform supports multi-party video visits, allowing up to 19 participants, staff, or family to join in a single call.

## IDT Integration FAQ

### Medication FAQ

- **What information do I need to set up medication reminders?** Participant's name and/or Device ID, medication names (or general terms like "morning medications"), specific days and times for reminders, whether observation is required, and end date for reminders (if applicable).
- **How do I submit new medication reminders?** Send an email to [support@care.coach](mailto:support@care.coach) or call 1-855-437-4569 ext. 1 with all required information.
- **How do I update or remove medication reminders?** Submit an update request noting the participant's name/Device ID, specify which medication reminder needs modification, include all new information, and indicate whether the change is temporary or permanent.

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## Appointment Reminder FAQ

- **What information do I need to set up appointment reminders?** Participant's name and/or Device ID, type of appointment (broad or specific), specific days and times, end time for reminders (if applicable), and any special instructions.
- **How do I submit, update, or remove appointment reminders?** Complete the appointment reminder request form, include all required information, and submit the request by emailing support@care.coach or calling 1-855-437-4569 ext. 1.

## Survey and Assessment FAQ

- **What information do I need to set up survey administration?** Participant's name and/or Device ID, type of survey (e.g., "PHQ-9 Depression Screening" or "Healthcare Satisfaction Survey"), specific days and times for survey delivery, end time for recurring surveys (if applicable), and any special instructions.
- **Where can I view survey results and assessments?** All survey results and assessment information are displayed on the Power BI platform. Care providers can use this tool to monitor trends, track participant responses, and gain valuable insights into participant health status.

## Bulk Notification FAQ

- **What details should be included in the bulk reminder request?** The Excel sheet should contain: participant's name and/or Device ID, type of reminder (e.g., "Medication Reminder" or "General Notification"), specific date and time for delivery, and any additional instructions for the message.
- **How do I submit a bulk reminder request?** Fill out an unrestricted Excel sheet with all necessary details and send the request via email to support@care.coach or call support at 1-855-437-4569 ext. 1.

## HOS-M FAQ

- **What is the HOS-M survey?** The Health Outcomes Survey Modified (HOS-M) helps measure participant health status and experiences. It is designed to track changes over time and provide valuable insights for care teams.
- **How does the care.coach avatar assist with the HOS-M survey?** The avatar provides reminders to check their mail and helps ensure timely completion.
- **When will participants receive reminders about the HOS-M survey?** One week before the first reminder, participants will receive a message to look out for a letter in the mail. Then, the avatar will provide additional reminders about checking their mail for the survey until they receive the letter.

## Emergency FAQ

- **What types of closures will participants be notified about?** Notifications will be sent for closures due to emergencies, severe weather, facility issues, or other unexpected disruptions that affect scheduled activities.
- **How will participants receive emergency notifications?** care.coach avatars will display a blast message informing participants of the closure, ensuring timely awareness.

- **Will participants need to respond to the notification?** While responses are not required, participants may acknowledge the alert, which helps care teams track who has received the message.
- **Where can I view participant responses and notification tracking?** All response and tracking data related to emergency closures will be provided in a summary email from a member of our Support Team.

### Fall Prevention FAQ

- **How often are participants checked for recent falls?** Participants are checked on a bi-weekly basis for any recent falls, and all incidents are reported via calls or emails based on the severity of the situation.
- **How often are participants encouraged to exercise?** Participants are encouraged to do some form of daily exercise.
- **What kind of exercise do they do?** The exercises included in the plan target strength and mobility, which are essential for fall prevention.