



ConXus Platform

Solution Description

Version 1.9
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ConXus Wellness Platform

For Population Health Management & Wellness Programs

Wellness providers, health plans, accountable-care organizations, hospital systems, and large employers license the ConXus Wellness Platform to deliver comprehensive, private-labeled workplace wellness and population health-management programs. ConXus is delivered using a software-as-a-service (SaaS) model that allows rapid deployment and unlimited scalability.

Integrated Solution

ConXus provides a fully integrated enterprise solution for program participants, health coaches, wellness screeners, and administrators. Modules can be licensed individually or in combination.

Flexible Delivery Options

Clients can configure modules to match program design for each end client or workplace, using the Administrator Portal to onboard and support each group.

ConXus Portal Solutions



- Optimizes the interface for any device—PC, tablet, or smartphone
- Personalizes the user experience based on health risks and readiness to change
- Provides access to modules such as health assessments, self-management tools, challenges, and events
- Autologs data from personal fitness devices and apps
- Connects your benefits resources and applications for a unified user experience
- Supports client branding and program design

ConXus Direct—Health Coaching & Documentation System



- Automates the stratification of participants into coaching groups and manages the enrollment process
- Enhances the coaching encounter by providing the coach real-time access to program data
- Supports scheduling, secure messaging, and goal setting
- Provides the flexibility and control to use multiple coaching vendors

ConXus Rewards—Incentive Management



- Supports incentive programs based on participation, results, and qualifying activities
- Provides real-time incentive status to participants and administrators
- Manages reasonable alternatives and medical exemptions
- Consolidates incentive awards from multiple sources

ConXus Biometrics—Biometrics Management



- Manages data collection at health fairs, from central labs, and from physician forms
- Consolidates data from multiple screening vendors
- Provides real-time access to results
- Prepopulates the health risk assessment

ConXus Administrator—Self-Service Program Administration



- Provides online tools to on-board and support each end client
- Offers extensive self-service reports for program management and outcome measurement
- Manages data exchange with third parties
- Controls access to data and functions based on class of administrator

HITRUST CSF Certification

The ConXus Platform has earned HITRUST Common Security Framework (CSF) certification from the HITRUST Alliance's CSF Assurance Program for data security and protection of protected health information (PHI). The CSF includes federal and state regulations, standards, and frameworks such as HIPAA, NIST, ISO, and COBIT.

The ConXus Platform is hosted on Microsoft Azure, a comprehensive set of cloud services. Azure provides highly scalable, reliable, and secure hosting from multiple data centers across the United States.

Azure is certified to the Health Information Trust Alliance Common Security Framework (HITRUST CSF). Azure also complies with Service Organization Controls standards for operational security (SOC 2 and SOC 3).

ConXus Portal Solutions

Drive engagement in wellness and health management programs.

Localized

White-label ConXus Portal Solutions:

- Reinforce your brand with themes, logos, colors, and images.
- Are accessible from any device – smartphone, tablet, or PC – at any time.
- Simplify navigation with an integrated, one-stop destination for program components.
- Help every participant succeed by promoting the right tools and content at the right time.

Portals are available as standalone solutions or integrated with ConXus Direct health coaching system, ConXus Biometrics health screening system, and ConXus Rewards incentive management system.

Personalized

The dynamic, personal dashboard highlights key information and next steps based on the participant's health risks, goals, and progress throughout the program. Our data-driven approach targets interests and unmet needs to inspire action and close gaps in care.

Participants enrolled in coaching can engage with their coach, set, and review their appointments, and review and record progress with coaching goals.

Configured

Support multiple business lines or programs from one platform by selecting modules, completion rules, dates, incentives, and branding for each group.

Combine ConXus Platform modules for health assessments, self-management tools, challenges, and wellness events with your data, resources, and third-party applications.

Connected

We support inbound and outbound single sign-on to integrate with:

- Your portal or intranet
- Benefits providers (health plan, health savings account)
- Health management services (disease management, EAP, telehealth)
- Program management applications (event scheduling, surveys)
- EMR systems

Integrated

We consolidate data from:

- Health screenings and laboratory tests
- A wide range of fitness devices and wellness apps
- Medical claims

ConXus Profile

Health Risk Assessment, Health Assessment, or Health Appraisal

ConXus Profile is a health risk assessment for all adults including commercial populations (aged 18 to 65), seniors (Medicare), and low-income groups (Medicaid). ConXus Profile Pediatric is a version of the health assessment for 6- to 17-year-olds, that supports commercial and Medicaid populations.

ConXus Profile has received Wellness and Health Promotion (WHP) 5 Certification from the National Committee for Quality Assurance (NCQA). The health assessment also complies with the Genetic Information Nondiscrimination Act (GINA).

The health assessment uses evidence-based guidelines and aims for a sixth-grade reading level. We follow the National Standards for Culturally and Linguistically Appropriate Services (CLAS) in Health Care in selecting texts and images.

To ensure currency with clinical guidelines, PDHI reviews and updates ConXus Profile annually, or more frequently when a guideline changes.

Online Questionnaire

The online questionnaire uses conditional branching logic to present the question set relevant to each user based on age, gender, and program options. Clients may configure the questionnaire to add or remove questions.

Data is saved automatically, and the participant may stop and return to complete the questionnaire at a later date. When the questionnaire is complete, responses are locked before the personalized report is displayed, preventing data manipulation. The online questionnaire can be switched between over 100 languages at any time using the Google Translate feature.

Scannable Bubble Forms

The questionnaire is also available for paper-and-pencil completion using bubble forms that support standard scanning technologies. Scanned data from paper forms is merged with data collected through the online questionnaire, providing a single database for reporting.

Administrator tools allow clients who wish to process forms internally to load scanned data and batch print participant and provider reports. Alternatively, PDHI offers a form processing service, see section *Health Assessment Completion Services*.

Biometric Data

Clients may configure the ConXus Profile so that laboratory results and vital signs are entered by:

- Participant using ranges or numerical values
- Screeners at health fairs or from provider results forms
- Health coaches
- Administrators as a batch file load

Biometric data can be entered before or after the questionnaire is started.

Controlled Availability & Incentives

Program settings determine when the health assessment can be completed and the (optional) incentive points that may be awarded for one or more of the following:

- Completion of the questionnaire
- Batch load of biometric screening results
- Biometric results that meet client-defined targets

Participant Reports

When the questionnaire is locked, participants receive a personalized report, available online in over 100 languages using the Google Translate feature. The report provides a wellness score, domain scores, and an assessment of health risks and lifestyle behaviors, together with recommended actions for health improvement. Summary results from the previous two health assessments are displayed for comparison with current risks. A printable provider summary report is also available, in English only.

Management Reporting

Refer to the section ConXus Administrator for information regarding reports.

Management reports track health assessment participation rates. Health risk reports provide an analysis of health risks, readiness to change, and compliance with recommended screenings for a program. Trend reports compare results across programs, with options to review the total population (all participants in each program) or the cohort (participants in both programs only).

Batch Printing & Export

Batch-printing functions support fulfillment of member and provider reports. Batch-export functions allow access to all questionnaire and assessment data for custom reporting and data sharing with partners. Batch processes can be requested online and run overnight, with data delivered to the Administrator Portal. For repeat processes, automated batch jobs may be scheduled for delivery to a secure FTP server.

Third-Party Health Assessments

Organizations currently using a health assessment may be reluctant to switch to a new vendor because of the valuable data pool they have accumulated. The third-party health assessment data-load process allows an organization to take advantage of the advanced data management facilities provided by the ConXus Platform, while retaining the value of historical health assessment data.

Third-party data loaded into the ConXus Platform is merged with current health assessment data collected using the ConXus Profile to provide:

- Coaches access to longitudinal health assessment data for individual participants
- Administrators access to consolidated data for outcome trend reporting

- Participants comparisons between previous and current results within the member report summary table

Completion and Processing Services

PDHI offers a range of tools and configurable services to facilitate health risk assessment completion. Our flexible delivery model allows you to use internal resources, to outsource to PDHI, or to use a combination of internal and external resources to meet your needs.

We offer services for:

- Member outreach by phone, email, SMS-text, and mail
- Assessment completion by telephone
- Processing paper questionnaires, including secure storage or disposal
- Mailing reports to participants and providers

Provider Biometric Results Form Services

PDHI offers a data entry service for provider results forms returned by secure fax, mail, or submitted electronically at the Wellness Portal. Once processed the verified data is uploaded into the health assessment.

Forms that do not match eligibility cannot be entered. PDHI can attempt to process these exceptions manually or can deliver a PDF version of the form to the client for remediation.

ConXus Steps

Self-Management Tools, Behavior-Change Action Plans, or Digital Coaching Programs

ConXus Steps self-management tools promote health improvement through gradual behavior change and better lifestyle choices. ConXus Steps has received Wellness and Health Promotion (WHP) 7 Certification from the National Committee for Quality Assurance (NCQA).

Components

ConXus Steps self-management tools are based on reliable research that shows that people can change bad habits to good ones. These tools help participants to:

- Set realistic goals toward better health that can fit into their lifestyle
- Overcome barriers to reaching these goals
- Track progress toward each goal, transforming small changes into healthy habits
- Locate people, organizations, and information that can provide consistent support
- Feel motivated, by awarding incentive points for completing each activity within an action plan

ConXus Steps incorporates videos from the Healthwise® Video Library. These brief (1 to 2 minute) animated and expert-hosted videos use plain language with action-focused, decision-based content.

Topics

Self-management tools are available for the following topics:

- **Back Care**—easing current discomfort and preventing future injury while strengthening the back
- **Depression**—managing moods, recognizing signs of depression, and learning where to find support
- **Diabetes Management**—controlling blood sugar with better lifestyle choices and stronger support networks.
- **Diabetes Prevention**—recognizing diabetes risk factors and learning how to lower them through healthy lifestyle choices
- **Financial Wellness**—promotes financial well-being by developing sound strategies for spending, saving, and protecting assets from loss.
- **Healthy Eating**—shopping for healthy options, preparing healthier meals, and making wise selections when eating out
- **Heart Disease Management**—reducing risks for complications through healthy behaviors and care providers' support
- **Heart Disease Prevention**—recognizing heart disease risks and learning how to lower them through heart-healthy choices
- **Physical Activity**—learning the benefits of different types of activity and how to fit activity into a busy day
- **Quitting Smoking**—preparing to quit, surviving quit day, and staying smoke-free
- **Risky Drinking**—developing the skills to avoid risky drinking behaviors and to moderate drinking patterns
- **Stress Management**—identifying stressors and taking control of stressful situations and feelings
- **Weight Management**—making healthier choices in eating habits and increasing the amount and intensity of physical activity

Management Reporting

Refer to the section ConXus Administrator for information regarding reports.

ConXus Connection

Challenges & Events—Friendly Competition & Opportunities for Health Improvement

Localized for your workplace, ConXus Connection helps participants motivate, encourage, and challenge each other to meet health goals and earn rewards. ConXus Connection uses social networking to drive healthy choices.

Challenges

Challenges are available for the following topics by category:

- **Physical activity**—Great River Walk, Big Island Trek, Strong to the Core, Make a Move, Hoops for Health, and Step Up
- **Weight loss**—Lose for Health, Maintain Don't Gain
- **Hydration**—Hydrate for Life!
- **Healthy eating**—Better Bites, Eat Well
- **Stress**—Relax and Revive!
- **Sleep**—Sleep Smart
- **Mind**—Page Turner

Challenges can be deployed to a wellness program as one of the following types. Personal and individual challenges support peer groups, allowing participants to share progress with friends.

Personal challenges allow participants to enroll in at any time, based on their personal goals.

Corporate challenges have a fixed start date and duration, and can be deployed as:

- **Individual challenges** have a fixed start date and duration, allowing participants to work independently to reach milestones.
- **Team challenges** also have a fixed start date and duration, allowing participants to form teams and work together to reach milestones.

Challenges can be tracked manually within the Wellness Portal or autologged from a wide range of popular fitness devices.

Events

Employer-defined health events or activities may occur throughout the year. They can include employer-sponsored activities like a wellness seminar and community programs like a walk/run or flu shot clinic.

Clients can maintain the list of available activities and configure events to:

- Take place on a specific date or during a defined period
- Allow completion by administrators or self-reported by participants
- Deliver event information and communication materials
- Define incentives awarded for completion of each event

Management Reporting:

Refer to the section ConXus Administrator for information regarding reports.

ConXus Health

Personal Health Record Module

ConXus Health is an integrated health record that provides a longitudinal repository of participant health data from multiple sources.

Data Integration

Selected data elements, such as biometric results, collected using other ConXus modules are stored in the health record. They can be supplemented by data entered directly by the participant or health coach.

Data from third-party sources, such as laboratory results and prescription refills, can be loaded into the health record using standard batch processes. Self-reported and coach-entered data uses SNOMED and NDC codes to provide data portability; loaded data retains the coding used at the source.

Components

Components of the health record include:

- Personal information—demographics, lifestyle, family history, advance directives
- Comprehensive medication record—Rx and OTC therapies. Prescription refills can be loaded from PBM data, if available.
- Medical history—conditions, treatments, allergies, immunizations, screenings, office visits
- Biometric results batch loaded directly from source data, if available, and used to populate the ConXus Profile health risk assessment
- Contact information for a provider, pharmacy, hospital, insurance, and an emergency
- Printer-friendly health record reports in PDF and XML for easy portability and data sharing

Healthwise Knowledgebase

Health Information

Healthwise Knowledgebase can be integrated into the Wellness Portal to provide encyclopedic content and videos for participants to make informed decisions about their health—from chronic disease management to wellness. Using plain language Knowledgebase guides participants as they work independently or with health coaches and physicians toward better health. The knowledgebase keeps pace with changes in the field of medicine by following a topic-development process.

Components include:

- **Health Topics**—an A-to-Z searchable list of health information
- **Interactive Tools**—easy-to-use calculators for making smart health decisions

- **Medications**—plain-language explanations of prescription medications, herbal remedies, and nutrition supplements
- **Symptom Checker**—symptom topics and interactive tools for making quick treatment decisions
- **Health Decisions Tools**—guidance in deciding on treatments that align with participants' personal values
- **Medical Tests**—explanations for why and how medical tests are done, including how the procedure will feel and what the results may mean

ConXus Rewards

Incentive Management & Fulfillment

ConXus Rewards is an incentive management system for wellness and population health programs that provides real-time feedback to employees, coaches, and administrators. Easy-to-use tools simplify program setup, administration, and compliance reporting.

ConXus Rewards provides great flexibility in program design, supporting incentives assigned at the group level for:

1. **Participation-based programs**—where participants earn incentives for completing an activity such as attending a wellness event or reaching a challenge milestone
2. **Results-based programs**—where participants earn incentives for achieving client-specified biometric targets or improvement results from the prior year. Incentives may be assigned to each target or to more complex designs such as three out of five results on target.
3. **Qualifying activity programs**—where participants must complete client-specified wellness activities (such as attend a health screening) to gain certain plan benefits

Program Definition

Programs can be defined by tiers or by time periods. Time periods drive program engagement throughout the year while tiers encourage healthy lifestyle changes and gamification through level achievement. Participation points, wellness targets, and qualifying activities can be assigned for each employer program and participant group, providing the flexibility to match plan design.

Incentive Program Status

The Wellness Portal is updated with participation, progress, and compliance information as data is loaded and activities are completed, providing participants with immediate access to status information on their personal dashboard.

Manage Exemptions, Reasonable Alternatives & Reporting

Tools are available for coaches and administrators to review participant status, assign and update activities, manage exemptions and reasonable alternatives, and generate compliance reports.

Self-service management reports are available to provide qualification status, points awarded, and redemptions.

Sample Plan Design Supported

Employees must complete a health assessment, attend a wellness screening, and meet the wellness targets to qualify for paying lower medical insurance premiums. If wellness targets are not met, the employee may complete an approved lifestyle coaching program to avoid paying the higher premium.

Wellness targets:

- BMI < 30, or 5% weight loss from the prior year
- Blood pressure < 140/90 mmHg
- Fasting glucose < 110 mg/dL

In addition, employees can earn incentive points for completing an action plan, attending a wellness seminar, and participating in a team challenge.

Integrated Fulfillment Option

A fully integrated reward-fulfillment service is offered in partnership with Online Rewards. Online Rewards offers a configurable catalog including digital and physical gift cards and debit cards in addition to popular merchandise and travel vouchers. Participants may redeem points online at any time up to the available balance, in \$5 increments. Fulfillment services can be offered by employer group.

Management Reporting

Refer to the section ConXus Administrator for information regarding reports.

ConXus Biometrics

Wellness Screenings Data Management

ConXus Biometrics centralizes management of your health screening programs. It consolidates results from multiple vendors and venues, including screenings completed on-site at health fairs, at central labs, in the physicians office, or at home using a kit.

ConXus Biometrics is available as a standalone application or as part of the integrated ConXus Platform.

Health Fairs

Tools are provided for scheduling events, allocating screening personnel, and configuring data collection requirements. Screeners can verify participant eligibility, enter results, make follow-up recommendations, and print a participant report. The secure online application transfers results in real time.

Provider Forms

Deliver a branded physician results available form the Wellness Portal which is, prepopulated with the participant's identifying information. Participants may download and print the form for sharing with the physician, upload the completed form at the Wellness Portal, or return by mail or fax for processing by your staff or by PDHI's data management services.

Vendors & Labs

Load data from central labs and screening vendors on a scheduled or as-needed basis. In addition to our standard file format, we support the native formats delivered by Quest Diagnostics, Impact Health, LabCorp, Hooper Holmes, and CRL Labs.

Data managers are given full visibility into the data exchange process including status, logs, and error files. The load process verifies participant eligibility, supports full or partial data loads, and manages corrections to previously loaded data.

Using Results

Screening results from all sources are consolidated into a central database. Results populate ConXus Health (personal health record), ConXus Profile (health assessment), and ConXus Direct (health coaching) and can trigger incentive awards for completion and on-target results.

Batch-export tools allow results to be transferred to your data warehouse or to your partners on a scheduled or as-needed basis. Multiple formats and file types are supported.

Program managers may run reports self-service at the Administrator Portal or schedule to run periodically. Management reports track participation rates in real time. Biometric risk reports provide an analysis of results for a program. Trend reports compare results across programs.

ConXus Direct

Health Coaching Enrollment, Documentation, & Information System

ConXus Direct streamlines the administration of your health coaching programs, standardizes care delivery, and optimizes the productivity of health coaches.

The system is available as a stand-alone application or may be integrated with our portal solutions to connect coach and participant.

Configurable Coaching Processes

ConXus Direct can be configured to support your business rules, including stratification, coach assignment, recruitment, participant status, workflow processes, and scheduling.

Participants can be stratified into coaching and assigned to coaches or coaching groups based on screening results, health assessments, and medical claims data.

Multiple service models and use of one or more coaching vendors can be supported using the same system.

For the Coach

Coaches set their availability for coaching by appointment type (telephonic and onsite) and may schedule coaching sessions using the integrated calendar.

Participant data can be reviewed in real time to enhance the quality and efficiency of the coaching encounter. This includes all components of the program, such as the health assessment, screening results, and gaps in care.

The coaching session is guided by a checklist to review status, set goals, and document progress. The secure messaging system allows the delivery of educational material and engagement with the participant between appointments.

For complex incentive programs, coaches may review wellness targets, assign and update qualifying activities, and manage exemptions and reasonable alternatives.

For the Participant

As an integral part of the Wellness Portal, participants can engage in coaching from their PC, smartphone, or tablet to:

- Meet their coach
- Message with their coach
- Set and review their appointments
- Review and record progress with goals set by the health coach

For Coach Administrators

For efficient program management, coach administrators can create coach accounts, assign coaches to coaching groups, and manage message template and attachment libraries.

Comprehensive internal and client compliance reports are available for self-service and can be scheduled to run periodically (e.g., weekly, monthly). Reports include coach assignments, scheduled/unscheduled appointments, completed/missed encounters, and participant status, selected by the client, coaching group, or coach.

Healthwise Care Support Pages

The ConXus Direct attachment library can be prepopulated with Healthwise® Care Support Pages for delivery of follow-up materials to complement health coaching. Care Support Pages cover more than 450 health and lifestyle issues, including chronic conditions, prevention, and wellness.

Care Support Pages give your participants engaging, action-oriented information that focuses on key health issues. Available in English and Spanish, they are written in plain language and include supporting images and illustrations, so participants understand the information the first time they see it.

ConXus Administrator

Administrator Portal

ConXus Administrator provides powerful self-service tools for site administration and program management. Multiple administrator roles may be defined to provide controlled access for internal personnel, partners, and customers.

Typical administrator roles include:

- Site administrator
- Program manager
- Data manager
- Customer

User Administration

Tools are provided for the creation and management of user accounts for administrators, health coaches, and screeners. Access rights can be restricted by data and function for compliance with the HIPAA Minimum Necessary Rule in limiting access to PHI. User account compliance reports facilitate HIPAA auditing requirements.

To streamline user management for large groups, access rights may be defined for user groups, with user accounts assigned to the group.

Program Management

Program management tools provide access to program configuration, including modules, dates, business rules, and incentives. Program managers may also set up health screening events and assign health coaches and screeners to the program.

While the program is running, program managers may also:

- Update program information and news
- Add program resources – images, files, or links to a website
- Rearrange the participant program dashboard to highlight key activities

Reporting

Over 55 types of reports are available, including program and coaching participation, incentives, and individual and aggregate results. Reports may be run self-service at the Administrator Portal or can be scheduled to run periodically (e.g. daily, weekly, and monthly).

Reports include multiple selection and data output options and are delivered in PDF or Excel formats.

Data Exchange

Data managers are given full visibility into the data exchange process including status, logs, and error files.

Batch-import tools allow loading of data on a scheduled or as-needed basis. The load process supports full or partial data loads and corrections to previously loaded data. Where appropriate, the load process also verifies participant eligibility at the time of data load.

Multiple formats and file types are supported, including eligibility, incentive awards, and screening results. We support the native formats delivered by Quest Diagnostics, LabCorp, Hooper Holmes, and CRL Labs.

Batch-export tools allow results to be transferred to the client data warehouse or to third-party vendors. Multiple formats and file types are supported, including incentives, coaching data, health assessments, and screening results. Data exports may be run on a scheduled or as needed basis.

Contracting

PDHI delivers its services to its clients on the basis of three documents consisting of:

1. **License and Services Agreement (LSA)** – The binding contract describing responsibilities of each party, term and termination, proprietary rights, limitation, disclaimer, indemnification, confidentiality, and general terms with exhibits describing the ConXus Platform, prices, software and service support, and hosting performance standards and responsibility for NCQA and HITRUST CSF standards. The initial contract term is 2 years.
2. **Business Associate Agreement (BAA)** – A HIPAA requirement when handling protected health information as a provider to a covered entity.
3. **Service Solution-Statement of Work (SS-SOW)** – A description of the service solution being delivered to the client which indicates what modules that will be used along with the means of access, the anticipated participant experience, and one-time implementation fees.

Clients can brand and or co-brand solutions. Each employer group or population may deploy a different combination of ConXus modules that can be added at any time during the contract term. This offers clients great flexibility to support multiple business lines with appropriate service levels. For example, an employer program may be offered at two levels, one with and one without wellness coaching.

Implementation

Implementation of the initial solution starts with a project kick-off meeting to formally transfer your main point of contact from your sales representative to your client services consultant (CSC). The kick-off call will cover the following topics:

1. Identify project team
2. Establish roles and responsibilities
3. Review statement of work
4. Finalize project plan
5. Establish implementation meeting schedule
6. Define communication processes

Client Resource Expectations

Client resources for the initial solution implementation can include the following functions; in some cases, an individual may serve multiple functions:

1. Project manager – responsible for coordination and overall implementation
2. Marketing – responsible for branding and communication materials
3. IT Specialist/Business Analyst – responsible for file and data exchanges and general technical support
4. Developer – responsible for implementing SAML 2.0 single sign-on (if applicable)

5. Program administrator – responsible for program set up and administration
6. Health coach manager – responsible for health coaching requirements (if applicable)
7. Trainer – responsible for ongoing training for client staff including program administration, health coach tools, and admin tools

Implementation Steps & Milestones

Each implementation is unique and a project plan will be developed as part of the SS-SOW process. Steps and milestones will likely include:

1. **Online Solution Components** – Definition and configuration of the ConXus modules, third-party applications, and services to be delivered for the initial solution. For example:
 - a. Will the health assessment require the addition or removal of questions for some groups?
 - b. Will labs and vitals be auto-loaded into the health assessment?
 - c. When will participants be able to access the challenges and events?
 - d. What incentive models will be supported?
 - e. What is the desired layout of the wellness dashboard?
2. **Participant Access** – Definition and configuration of participant access methods. To access the ConXus Platform, participants can use single sign-on for synchronized logon from one or more client portals, or direct logon from the ConXus Managed Portal. The ConXus Managed Portal provides registration, authentication, and eligibility file management services. Multiple end clients may use the same managed portal as long as branding, usage instructions, and any terms and conditions are common to all groups.
3. **Eligibility Data** – Eligibility data (member rosters) is required for all groups. The ConXus Platform will accept three types of eligibility file feeds to give clients flexibility in managing eligibility across multiple groups.
 - a. A full refresh file replaces all eligibility data for all groups.
 - b. A partial refresh file replaces all eligibility data for a specified group or groups.
 - c. An incremental file adds/updates eligibility data (changes since last partial or full refresh).

Data exchange usually runs as an automated batch process at night using PDHI or client secure FTP servers. Client administrators can monitor the file loads from the online administrator portal, where logs and error files are posted.

Each user in the eligibility file is required to have a unique and unchanging ID, which may be an internally generated ID. In addition, the eligibility file management system allows two alternate IDs, which may be used by the client for record linkage to other systems, such as an EMR or Master Patient Index.

PDHI publishes a standard eligibility file format. If the client is unable to map to PDHI's standard file format, a mapping to the standard format can be developed as a preprocessing step in the load process.

4. **Historical Data Load** – Where the client has historical data to be loaded into the ConXus Platform, such as screening or health assessment results, a file mapping for historical data load will be defined, developed, and tested. This service will incur additional fees, to be determined once requirements are known.
5. **Other Data Exchange** – Definition of other data files to be exchanged with the ConXus Platform, together with file formats, the exchange methodology, and the frequency of data transfer to be used. A range of standard import/export formats and processes are available. In addition, custom processes may be developed as required.
 - Examples of data imports include biometric screening results and incentive redemptions.
 - Examples of data exports include health assessment results and incentives earned.

Data exchange usually runs as an automated batch process at night using PDHI or client secure FTP servers.

6. **Marketing and Branding** – Clients may define the logos, images, colors, and general styling in addition to the branding of communication materials for each service line or group. A style guide is available to clients to assist with the design. Sub-branding is available for each end client if required.
7. **Integration of Third -party Applications** – Definition of integration via outbound single sign-on for the integration of third -party applications, such as benefits information, if required.
8. **Health Assessment Completion Options** – If the client wishes to use a paper health assessment forms or facilitated completion by phone, additional services, and process flows will be defined and implemented based on the outreach model and communication methodologies available. Additional fees apply to these services.
9. **Health Coaching System Setup** – Definition of the model and processes (if applicable), to include:
 - a. Stratification rules for coaching eligibility.
 - b. Integration with wellness and benefits hub.
 - Scheduling
 - Coach information
 - Goal setting
 - Participant – Coaching messaging
 - c. Coaching tasks and the checklists associated with each task.
 - d. Drop-down list definitions for:
 - Contact type
 - Contact method
 - Member status during the program

- 10. Messaging** – Definition of rules and message content to deploy system generated messages, if required.
- 11. Compliance and Security** – Definition of password policies, session management, and terms and conditions.
- 12. System Acceptance and End-User Testing** -- When the initial solution has been approved for production, your CSC will work with the client project manager to identify, document and troubleshoot any issues that arise to achieve system acceptance. During the system acceptance phase, the client should test each configuration defined during the implementation to ensure that the implementation meets the business requirements. A guide is available to assist with the testing process.
- 13. Training** – PDHI utilizes a train-the-trainer approach to training. Clients will identify key individuals who will be responsible for training additional staff as well as new staff after the initial training. Your CSC will conduct web-based training sessions. These trainings will be recorded and made available to clients for ongoing use.

Training covers the following categories (when applicable):

1. Client administrator portal – for program administrators and support staff
2. Reporting and data management – for program administrators and IT staff
3. Program administration and set up – for program administrators
4. Health coaching system – for health coaches and support staff
5. Sales staff training – for business development and sales staff

PDHI provides detailed user guides documenting step-by-step instructions for using the platform. These guides are regularly updated to capture new functionality and enhancements and to incorporate client feedback.

- 14. Billing** – Explanation of the billing process, exceptions, and expectations.

Implementation Time

The time to implement your solution will vary depending on:

- Availability of client resources
- Complexity of the service solution
- Client's timeliness to provide deliverables and make decisions

Typical implementations to deliver the client wellness portal and supporting components are completed in 3-4 weeks. If the health coaching system is included, initial solution implementations typically run 4-6 weeks.