GET COVERED CONNECTOR

OE7 Connector User Guide

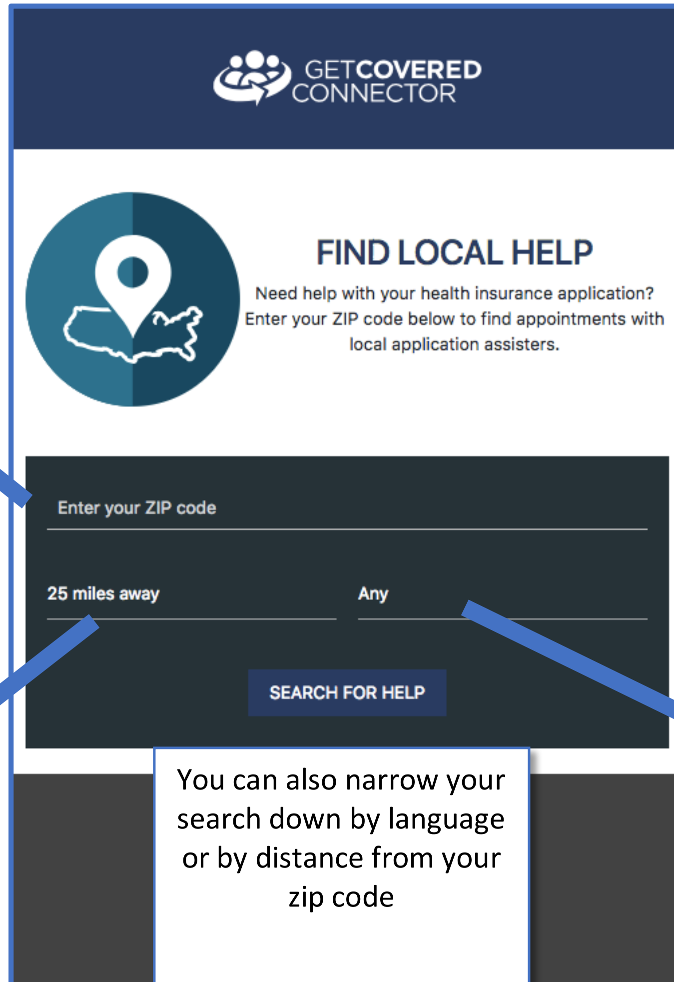
Get Covered Connector – User Manual (1/2)

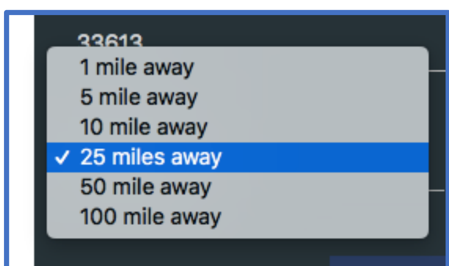
Get Covered Connector – User Manual (2/2)

Widget – Overview

The widget, consumer-facing side, or front end of the Connector is a great feature that allows consumers, outreach partners and other interested people to promote assisters' schedules on the Connector. Anyone can go to widget.getcoveredamerica.org and seamlessly book an appointment!

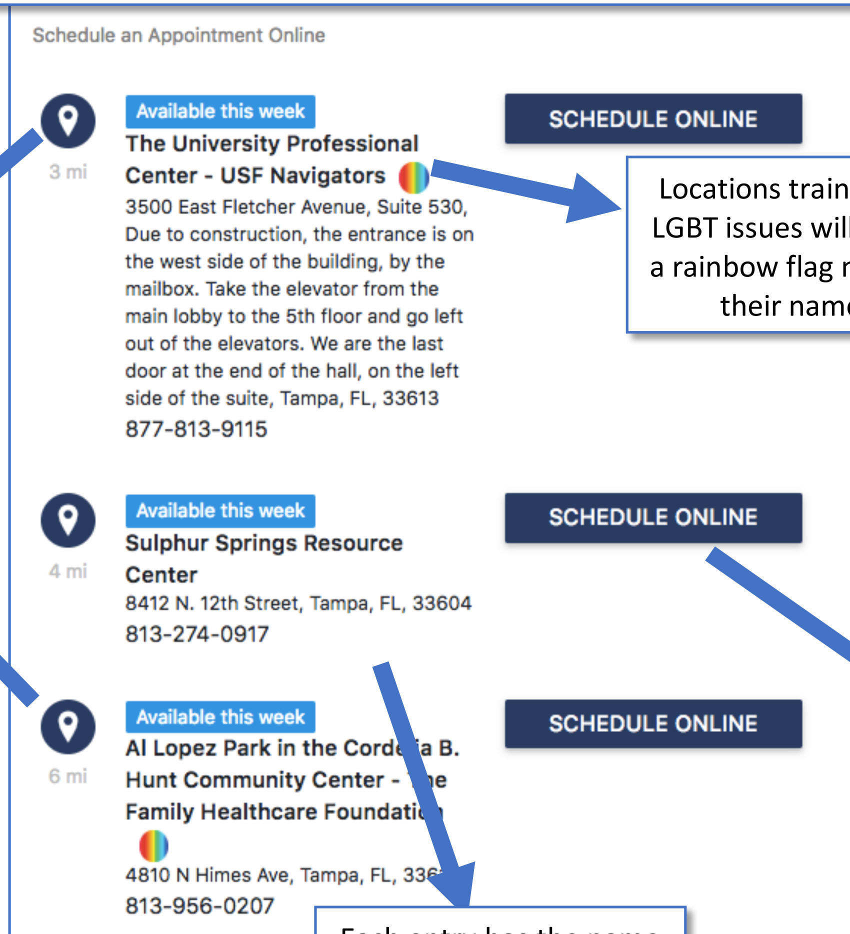
When using the widget, enter your zip code to find appointments available in your area.





You can also narrow your search down by language or by distance from your zip code

Each search will return a list of locations that have open appointment times that can be booked, as well as a host of information about the location



Locations trained on LGBT issues will show a rainbow flag next to their name

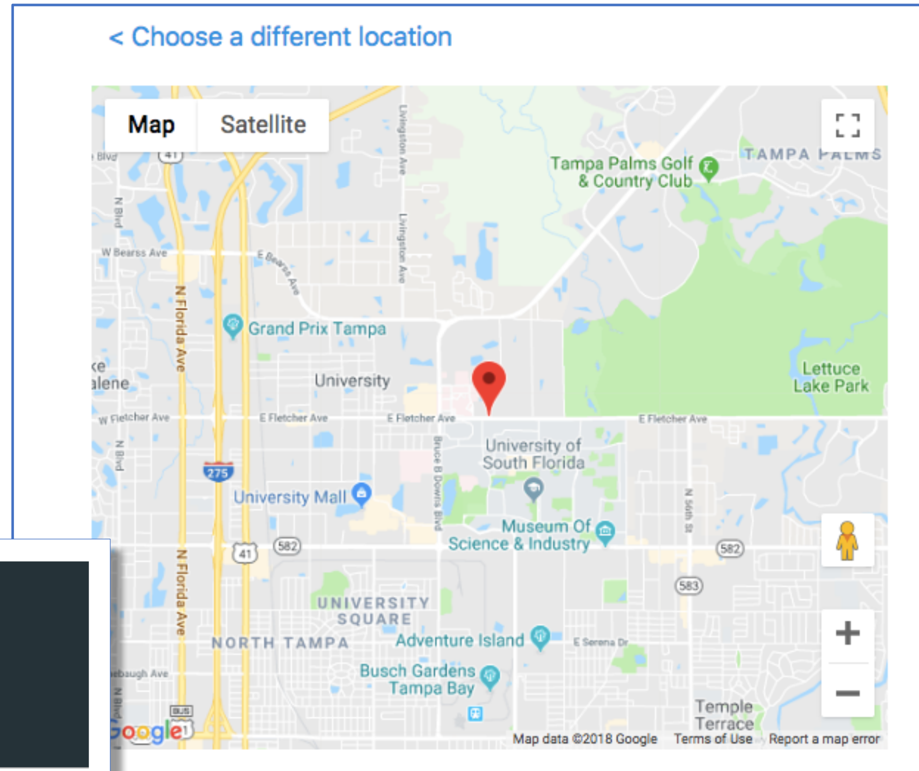
Locations are sorted by distance and availability.

Users can see whether appointments are available at that location in the next week, two weeks, month or two months based on the banner above each location

To schedule an appointment at that location, click the dark blue “Schedule Online” button

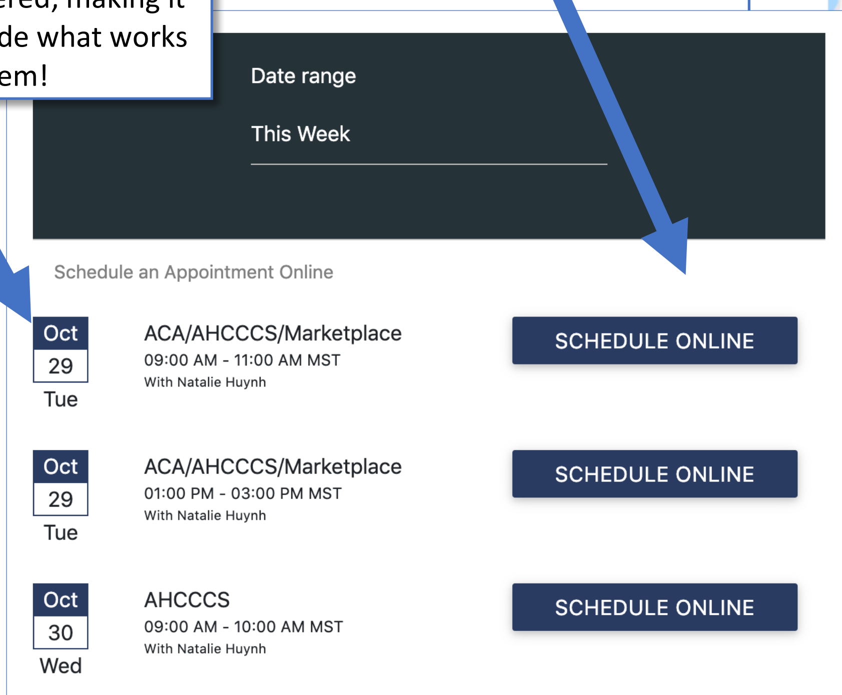
Each entry has the name of the location, it’s address (including city, state and zip) as well as a phone number

Once you've selected a location, you'll be able to select a date and time to book an appointment. The top half of the page will show a map with a pin for the location



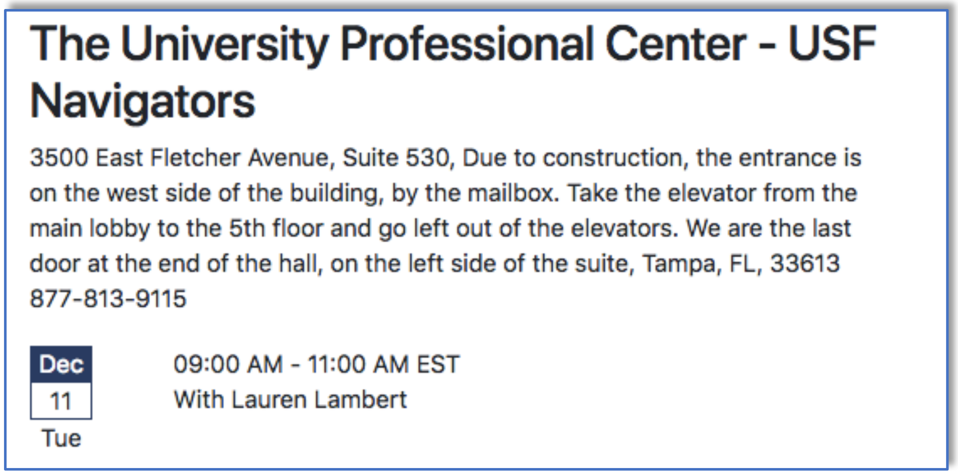
To schedule an appointment at that time, click the dark blue "Schedule Online" button

In addition to displaying the date and day of the week, each slot will have the time of the appointment, the name of the assister and any accommodations offered, making it easy for users to decide what works best for them!



The bottom half will show you a list of upcoming appointments available at this location

You'll then see both the information on the location and appointment time as well as a form for the consumer's information that will be stored in the connector:

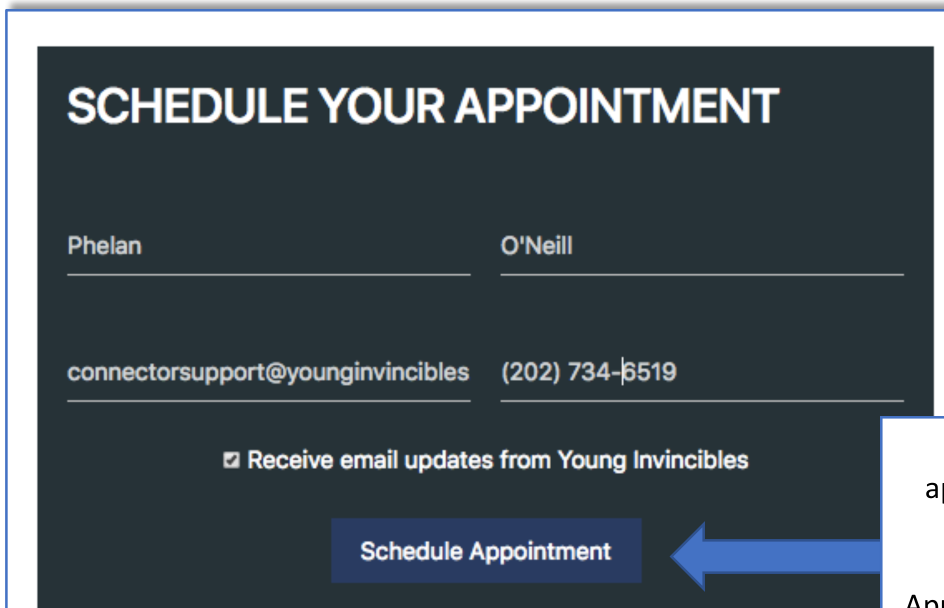


The University Professional Center - USF Navigators

3500 East Fletcher Avenue, Suite 530, Due to construction, the entrance is on the west side of the building, by the mailbox. Take the elevator from the main lobby to the 5th floor and go left out of the elevators. We are the last door at the end of the hall, on the left side of the suite, Tampa, FL, 33613
877-813-9115

Dec
11
Tue

09:00 AM - 11:00 AM EST
With Lauren Lambert



SCHEDULE YOUR APPOINTMENT

Phelan
O'Neill
connectorsupport@younginvincibles
(202) 734-6519

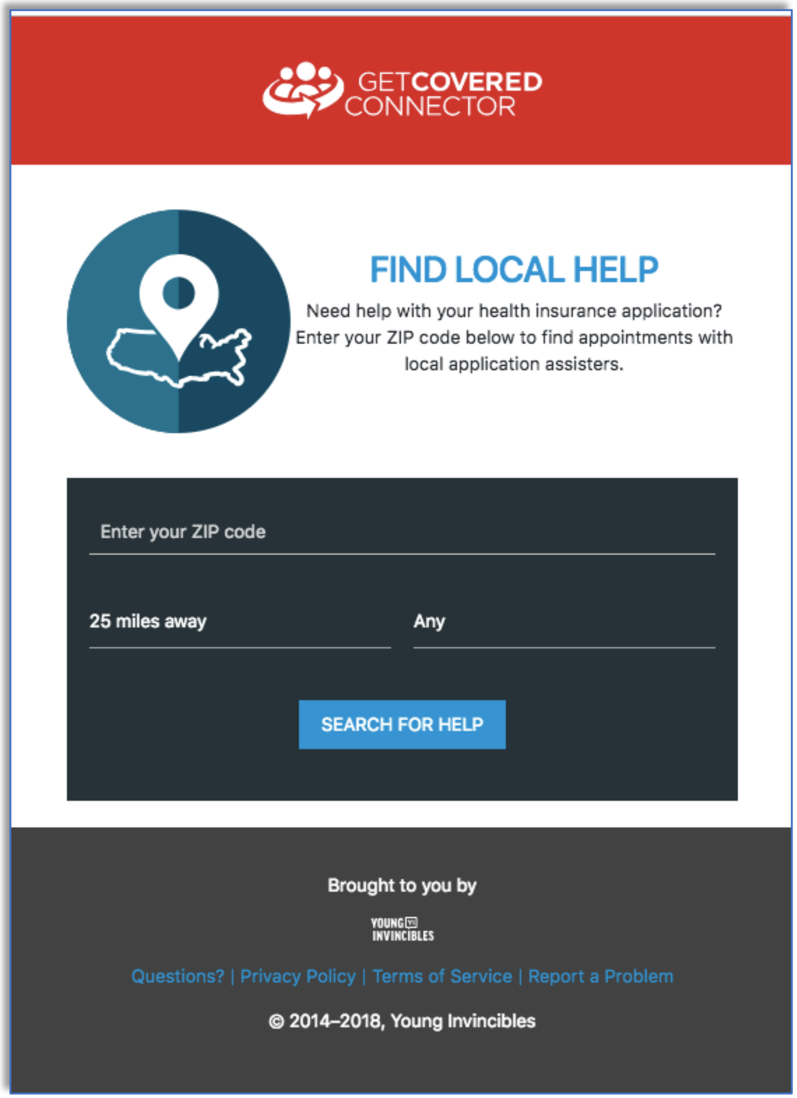
☑ Receive email updates from Young Invincibles

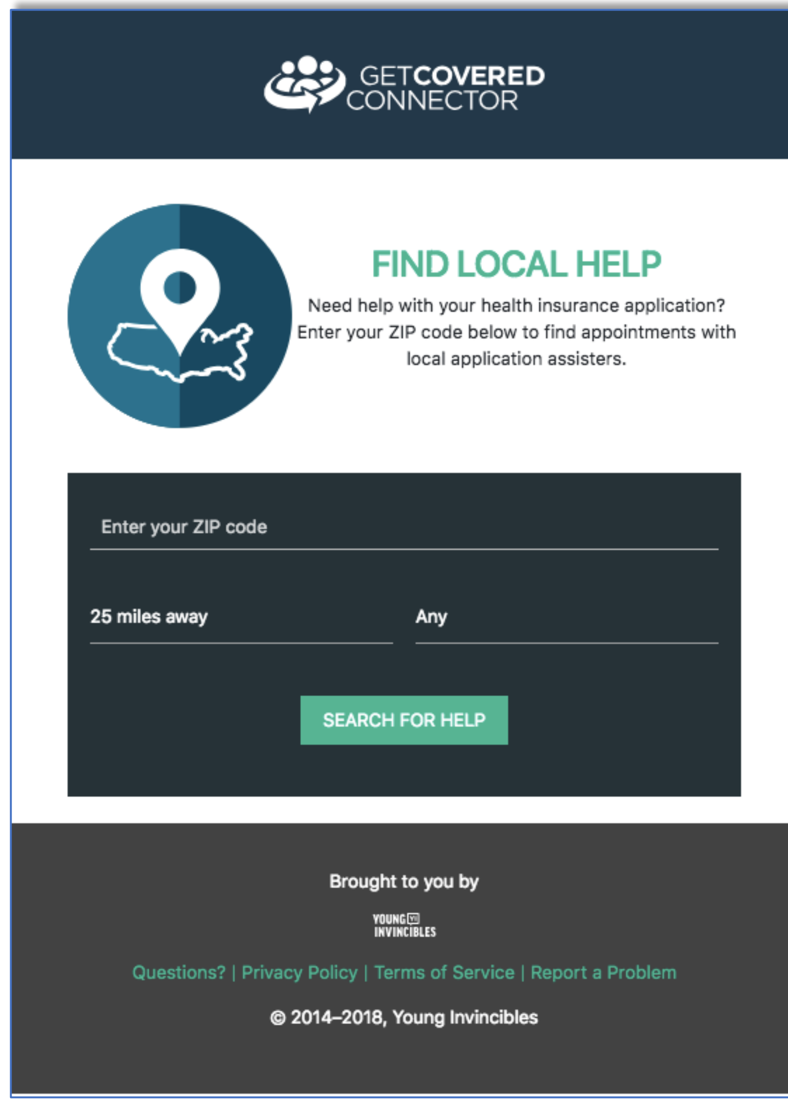
Schedule Appointment

To book the appointment, click the dark blue "Schedule Appointment" button

Widget - Embedding the Widget

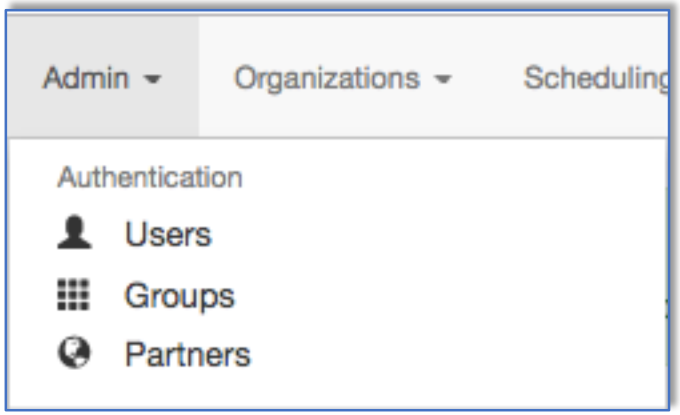
In addition to being hosted on widget.getcoveredamerica.org, you can embed the widget on your own website to include your logo and color scheme. Interested in learning more? Contact ConnectorSupport@younginvincibles.org



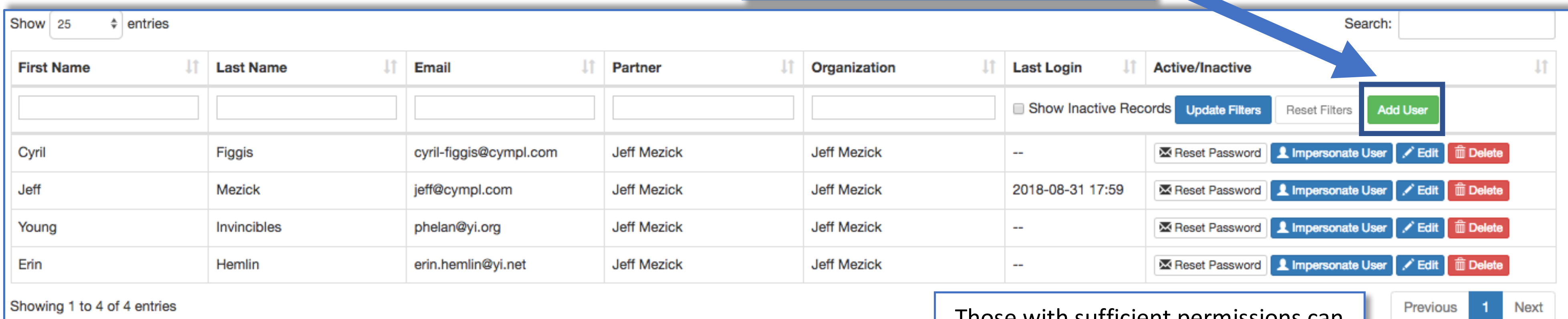


Users – Add a User

Users (and Assisters) are the lifeblood of the Connector, and are managed from the "Users" page found under the admin tab.



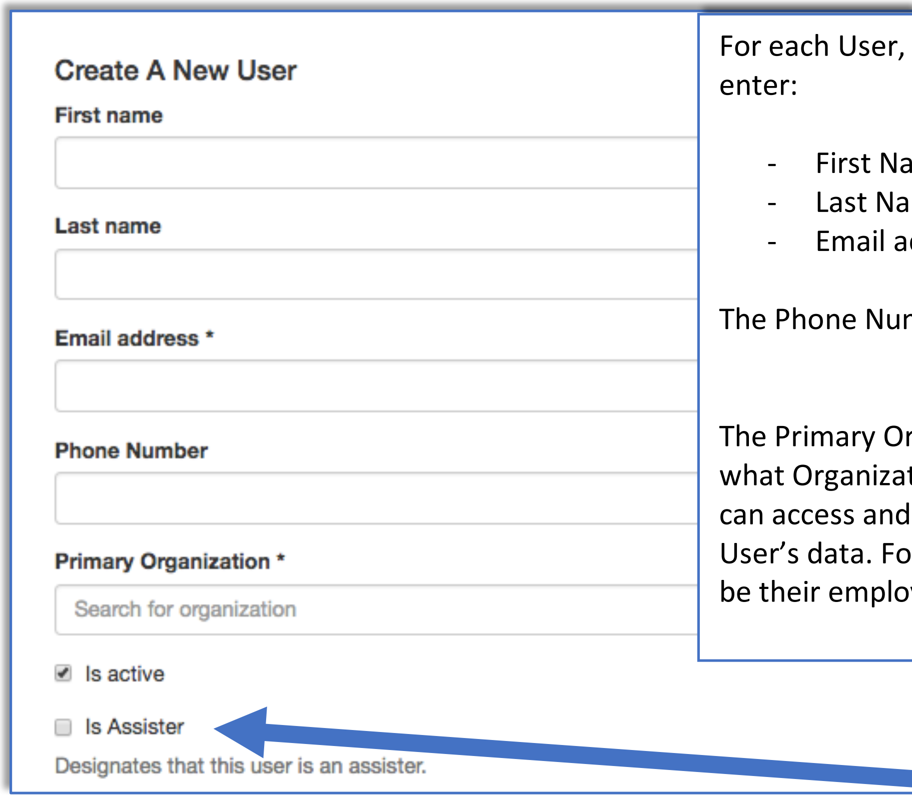
To add a new User/Assister, click the green "Add User" button


Show 25 entries   Search:

First Name	Last Name	Email	Partner	Organization	Last Login	Active/Inactive
					Show Inactive Records	Update Filters / Reset Filters / Add User
Cyril	Figgis	cyril-figgis@cympl.com	Jeff Mezick	Jeff Mezick	--	Reset Password / Impersonate User / Edit / Delete
Jeff	Mezick	jeff@cympl.com	Jeff Mezick	Jeff Mezick	2018-08-31 17:59	Reset Password / Impersonate User / Edit / Delete
Young	Invincibles	phelan@yi.org	Jeff Mezick	Jeff Mezick	--	Reset Password / Impersonate User / Edit / Delete
Erin	Hemlin	erin.hemlin@yi.net	Jeff Mezick	Jeff Mezick	--	Reset Password / Impersonate User / Edit / Delete

Showing 1 to 4 of 4 entries   Previous 1 Next

Those with sufficient permissions can Reset Passwords, Impersonate Users, Edit Users and Deactivate (Delete) Users from the main Users page



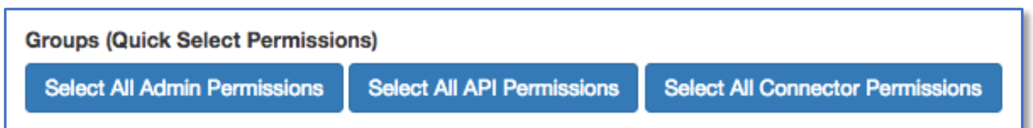
For each User, it's required that you enter:

- First Name
- Last Name
- Email address

The Phone Number field is optional

The Primary Organization determines what Organization's data the User can access and who can see this User's data. For most Users, this will be their employer

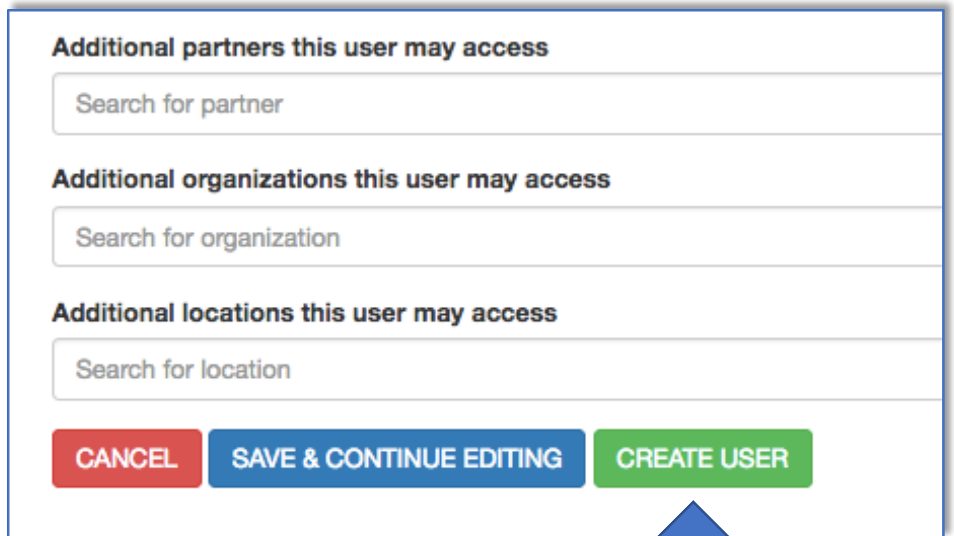
If a User is also an Assister, check the "Is Assister" box. This will allow them to be assigned to Schedules and Appointments



In addition to providing access to Connector Data, you can also determine the permissions for the User. You can use the Group buttons to select a default range of permissions (Connector for basic users, Admin for managers and other administrators) and/or use the individual checkboxes below to set your preferred permission settings.

In select cases, users may work for more than one Organization, or may need access to more than one Organization for reporting, collaboration or other reasons. Simply add one of the other Organizations you have access to the "Additional organizations this user may access" field.

You can also share locations for enrollment events or purposes by adding it under the "Additional locations this user may access" field.



When you're done creating or updating a User, click the green "Create User" or "Update User" button to save your work.

Users – Permissions Guide (Easy)

The simpler way to set permissions in the Connector is to use the default permission groups provided for you. Here's a short guide to which group best fits each user

Admin User

- Designed for "Admins" – Program Managers, Directors, Supervisors, anyone providing technical support
- Allows more advanced users to use additional features in helping set up their Organization for success
- Includes all permissions in the Connector user default plus the ability to change Users and Organizations

Connector User

- Designed for basic users – Navigators, CACs, anyone who needs to access the Connector for data/reporting purposes
- Selected by default for all users with the "Is Assister" box checked
- Includes access to core features like Appointments, Locations, Schedules and Reports
- Limited permissions to keep Connector access/control secure

NOTE: You can always customize these further to fit your unique program's needs. These selections provide a *default* value and you are by no means obligated to stick to them!

The Connector allows for a lot of customization of User Permissions. For users seeking further customization than the standard permission groups described above, this should serve as a useful guide

Users:

Permission	What it does	Who should have it
Add Users	Allows Users to create new accounts on the Connector	Program Directors, Managers, anyone who is responsible for "onboarding" new users
Edit Users	Allows Users to edit existing accounts on the Connector (e.g. updating an email address)	Program Directors, Managers, anyone who is responsible for "onboarding" new users
Delete Users	Allows Users to delete (make inactive) accounts on the Connector	Program Directors, Managers, anyone who is responsible for "onboarding" new users
View Users	Allows Users to view the "Users" and "Assisters" page. Also provides access to the "view calendar by Assister" feature	Everyone
Impersonate Other Users	Allows Users to view the Connector as if they were a different User. Can be useful in checking permission errors	Program Directors, Managers, anyone who provides basic Connector support

Appointments:

Permission	What it does	Who should have it
Add Appointments	Allows Users to add new appointments	Everyone
Edit Appointments	Allows Users to edit and update existing appointments, including filling out reporting fields, closing out appointments	Assisters, Everyone
View Appointments	Allows Users to view the “Users” and “Assisters” page. Also provides access to the “Ciew Calendar by Assister” feature	Everyone

Locations:

Permission	What it does	Who should have it
Add Locations	Allows Users to add new Locations on the Connector	Everyone
Edit Locations	Allows Users to edit existing accounts on the Connector (e.g. updating an email address)	Everyone
Delete Locations	Allows Users to delete (make inactive) Locations on the Connector	Everyone
View Locations	Allows Users to view the “Locations” page. Also provides access to the “View Calendar by Location” feature	Everyone

Organizations:

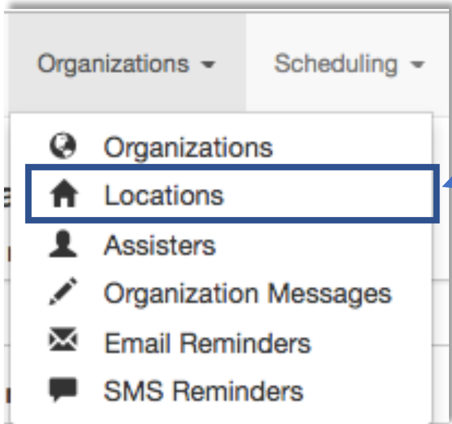
Permission	What it does	Who should have it
Add Organization	Allows Users to add Organizations on the Connector	Program Directors, Subscriber staff
Edit Organizations	Allows Users to edit existing Organizations on the Connector	Program Directors, Subscriber staff
Delete Organizations	Allows Users to delete (make inactive) Organizations on the Connector	Program Directors, subscriber staff
View Organizations	Allows Users to view the “Organizations” page.	Program Directors, subscriber staff

Schedules:

Permission	What it does	Who should have it
Add Schedules	Allows Users to create new Schedules on the Connector	Everyone
Edit Schedules	Allows Users to edit existing Schedules on the Connector (e.g. updating an email address)	Everyone
Delete Schedules	Allows Users to delete (make inactive) Schedules on the Connector	Everyone
View Schedules	Allows Users to view the “Schedules” page.	Everyone

Locations

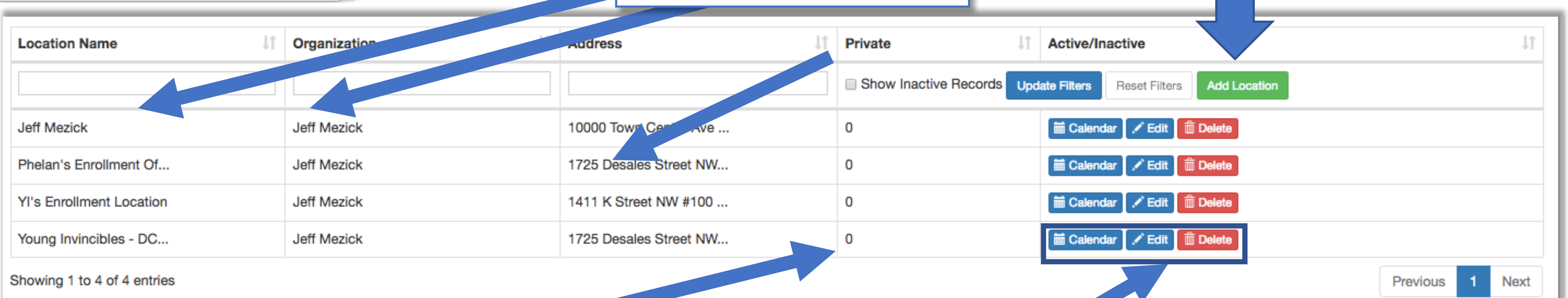
Locations are the lifeblood of the Connector. Locations include both physical enrollment places (offices, coffee shops, schools, rec centers, medical clinics, etc) as well serving as a placeholder for remote or virtual appointments.



The Locations page can be found under the "Organizations" tab

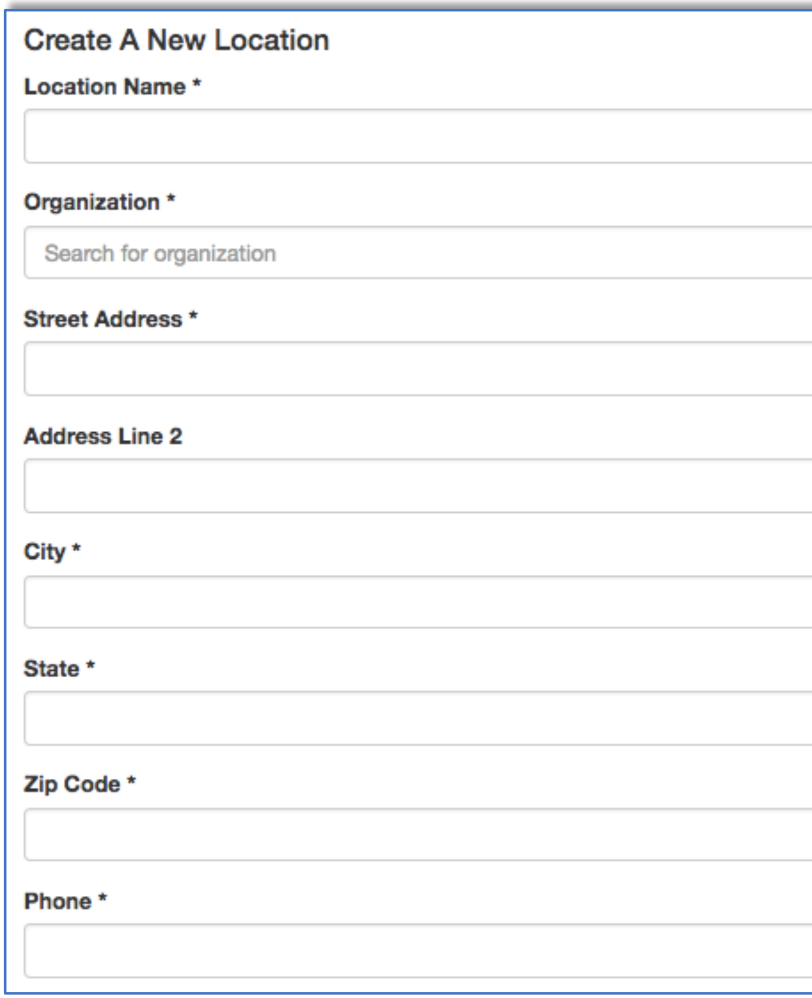
The Locations table displays the top-level information about each location the User can see including name, Organization and address

Click the green "Add Location" button to add a new Location



If a location is marked "private" and not viewable on the widget, it will display a "1" in this column

You can also deactivate, edit, or view a calendar for each location from this page



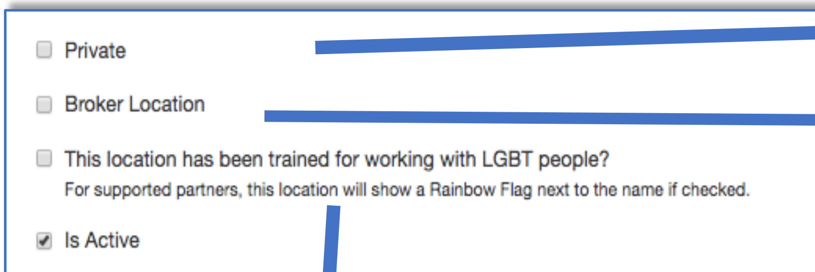
The following fields are required for a new location:

- Location Name
- Organization
- Address
- City
- State
- Zip Code
- Phone Number

Make sure when adding a location that:

- You select an Organization from the dropdown list that populates when you begin typing
- The Phone number goes to someone who can answer questions and reschedule appointments – it will show up in confirmations and on the widget

Beneath the details of the location are a few settings that are optional:

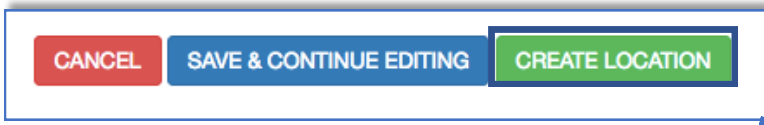


If a location is private, it won't show up on the widget – recommended for walk-ins and other locations where appointments should be limited. *Note: 1 out of 3 appointments come through the Widget, so use this sparingly!*

Locations trained on LGBT Cultural Competency can check the box and display a rainbow flag next to the name on the widget

Locations managed by Agents and Brokers should check this box to display a disclaimer on the widget

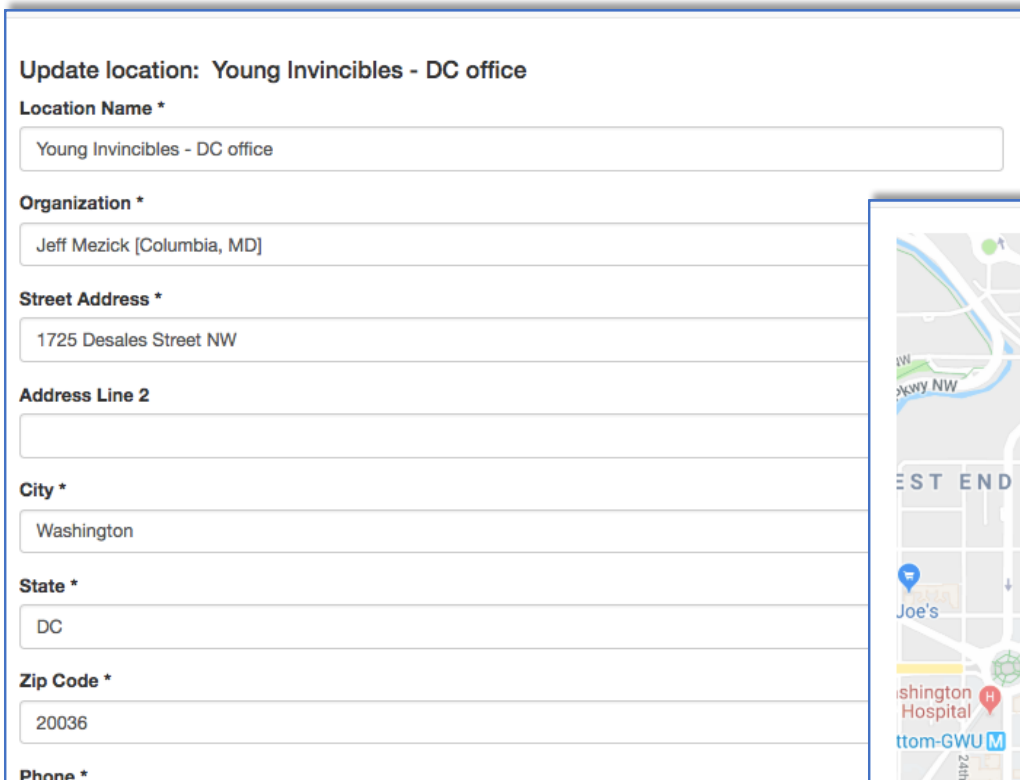
Lastly, you can select languages supported at <u>ALL</u> times by that location. You'll be able to set up additional languages for each individual schedule.

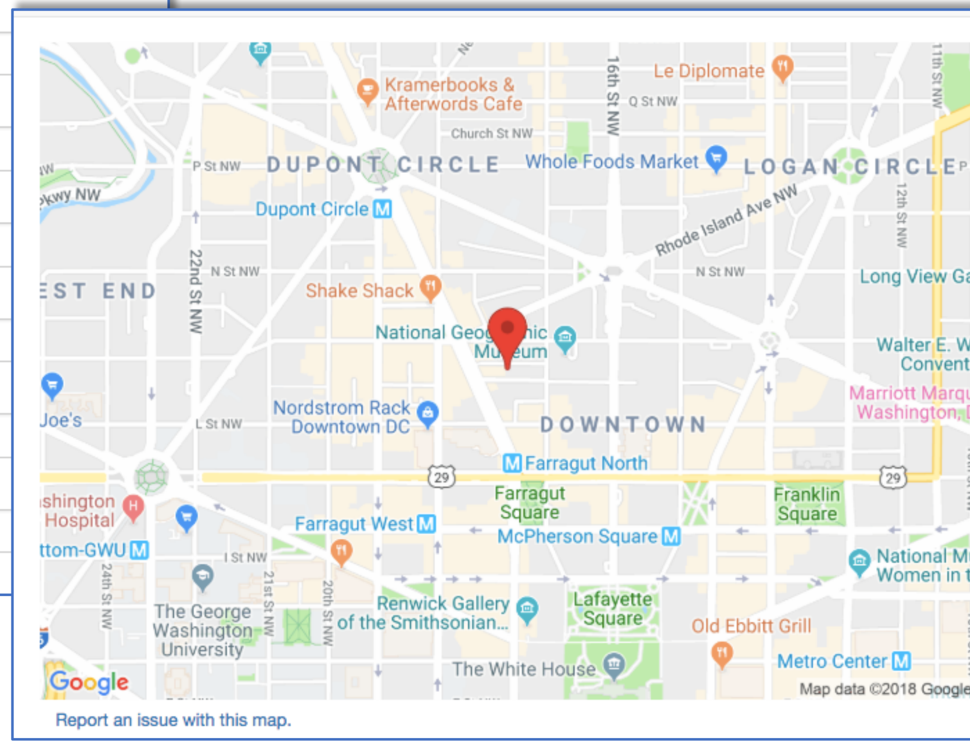


Click the green "Create Location" button to add a new Location and go back to the main Location page or click the blue Save & Continue Editing" button to save your work and continue editing this location

Locations – Updating a Location

When editing a location, you can update any information about the location and view a map of the location. Please contact connectorsupport@younginvincibles.org if there is an issue with the map as it is included in email reminders to consumers.

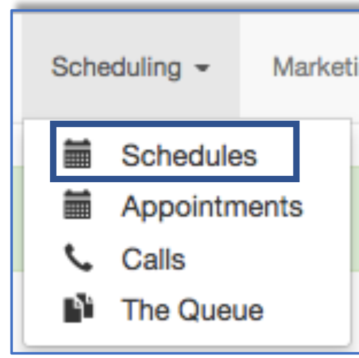


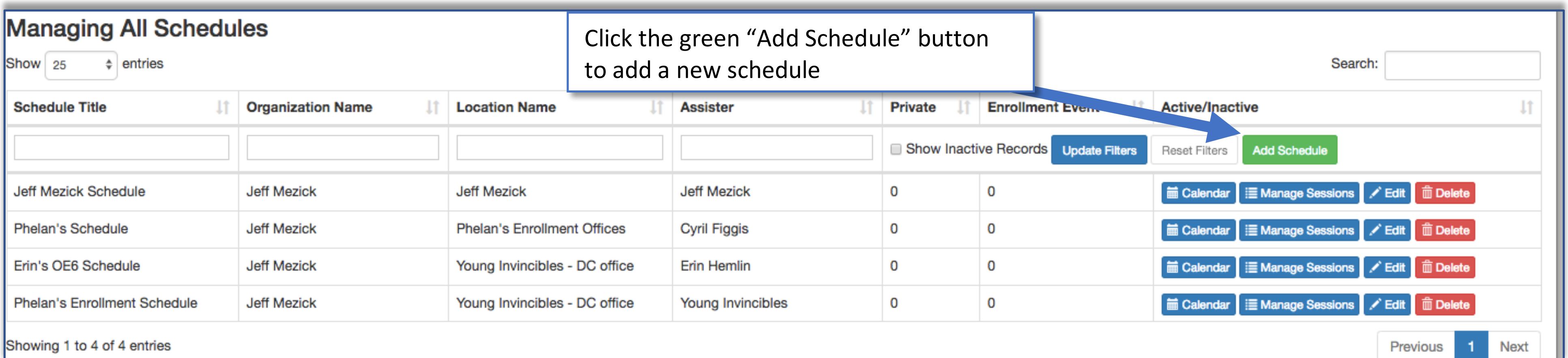


Schedules – Overview

Schedules are where you'll add and manage your availability. While each organization varies in their standards, we recommend each assister have one schedule per location that they'll be doing enrollment at.

You can access the Schedules page by clicking on "Schedules" under the Scheduling tab.



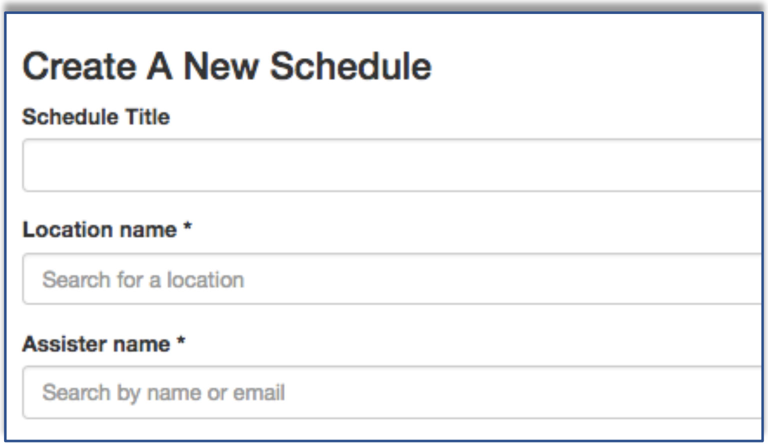


Click the green "Add Schedule" button to add a new schedule

Each Schedule is listed in the table by its name, Organization, Location and Assister

Each Schedule has it's own calendar page, sessions page, and can be edited or deactivated from the main page

Schedules – Create a New Schedule

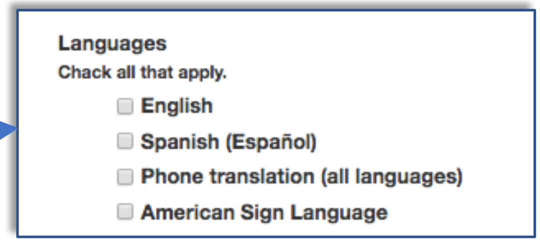


When adding a Schedule, there are three key settings:

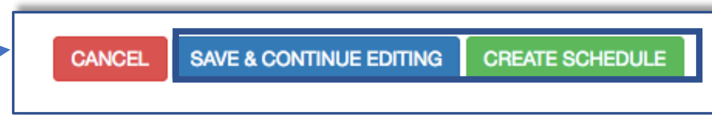
- A descriptive title (optional) that makes it easier to identify
- The Location where the schedule is at
- The assister assigned to this schedule

Hides available appointments from the widget a set interval before the appointment – you'll still be able to book each occurrence from the admin side – can be set to any length between 0 minutes and a week, with 90 minutes as the default

Before saving your work, you can also add addition languages to <u>additional</u> languages that are being offered as part of this schedule

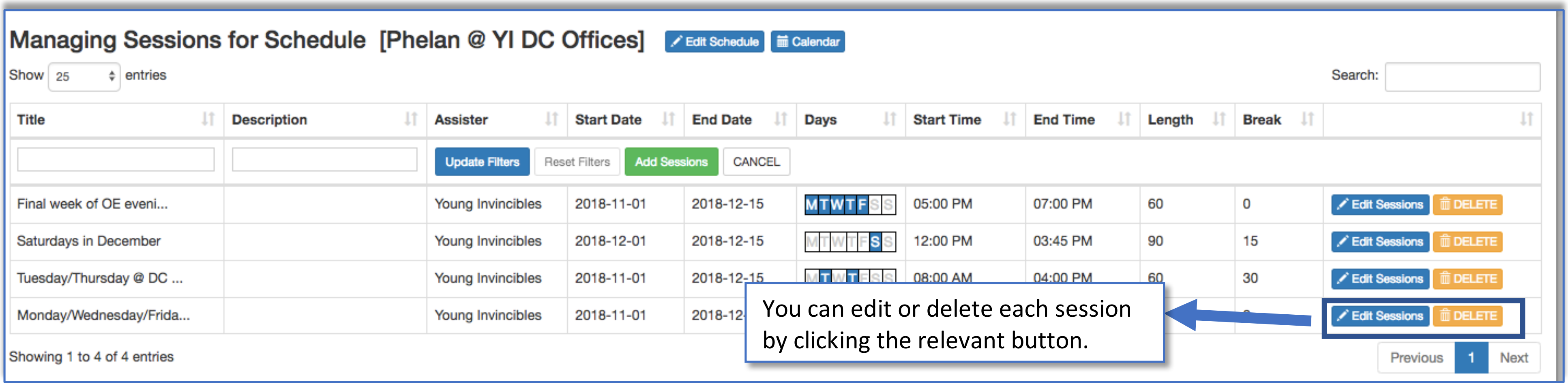


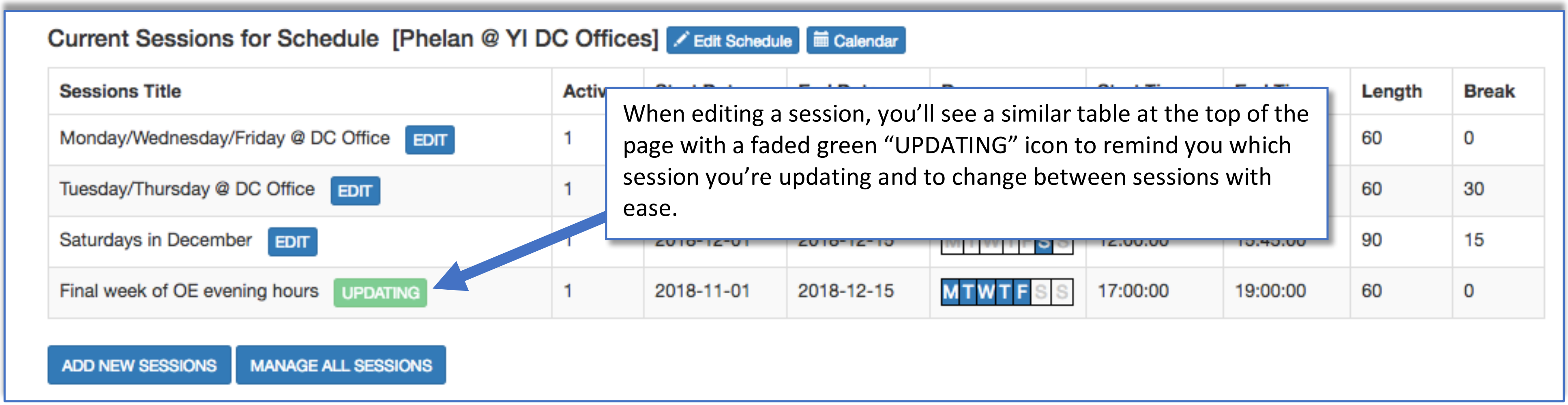
Click the green "Create Schedule" button to save your work and begin adding sessions, or click the blue "Save & Continue Editing" button to continue modifying your schedule



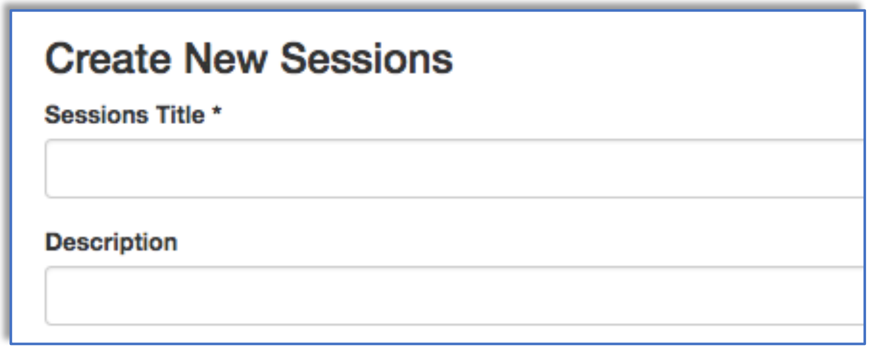
Schedules – Managing Sessions

From each Schedule's page, you have the option to manage all the sessions that have been added. The sessions are displayed in a table with the days of the weeks highlighted for each session, as well as information about the start date, end date, start time, end time, length of appointments and the break between appointments:



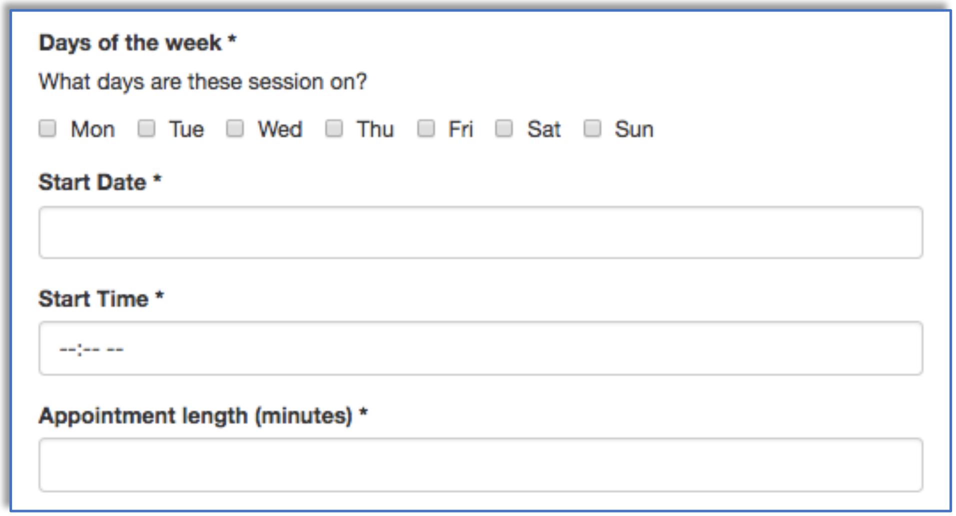


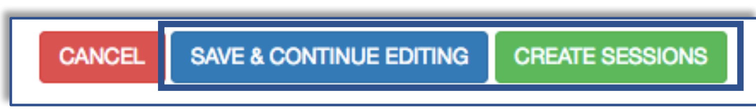
Schedules – Adding Sessions



Sessions are the rules that tell the Connector when the assister will be available. Sessions should be as broad as possible, but you can create as many as possible to refine your schedule to match your availability.

- A title
- An optional description
- The days that the session is active
- A Start Date
- A Start Time
- The length of each appointment (in minutes)
- An End Date (optional)
- An End Time
- Break between appointments (in minutes)

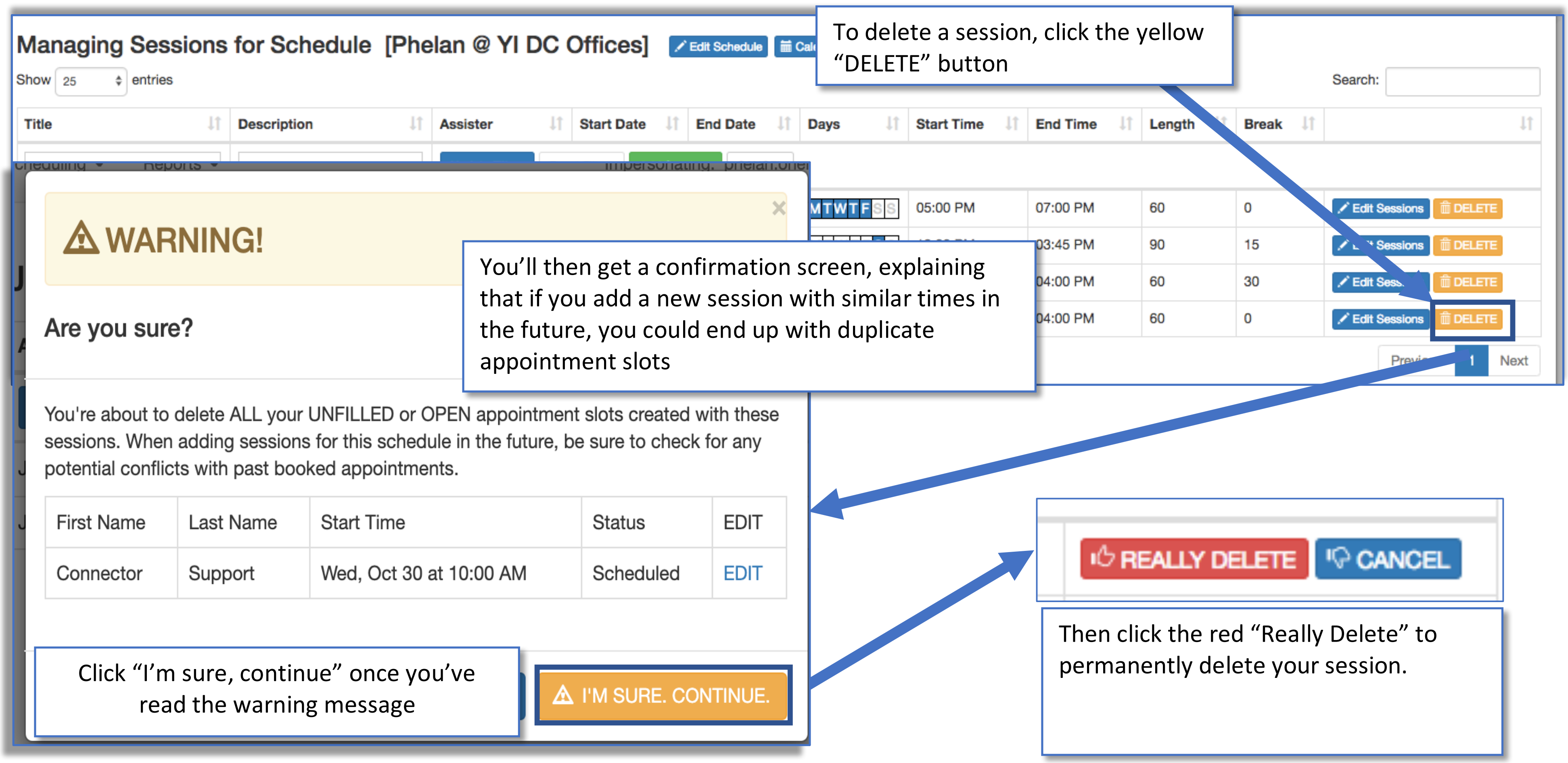




Click the green "Create Schedule" button to save your work, or click the blue "Save & Continue Editing" button to continue modifying your sessions

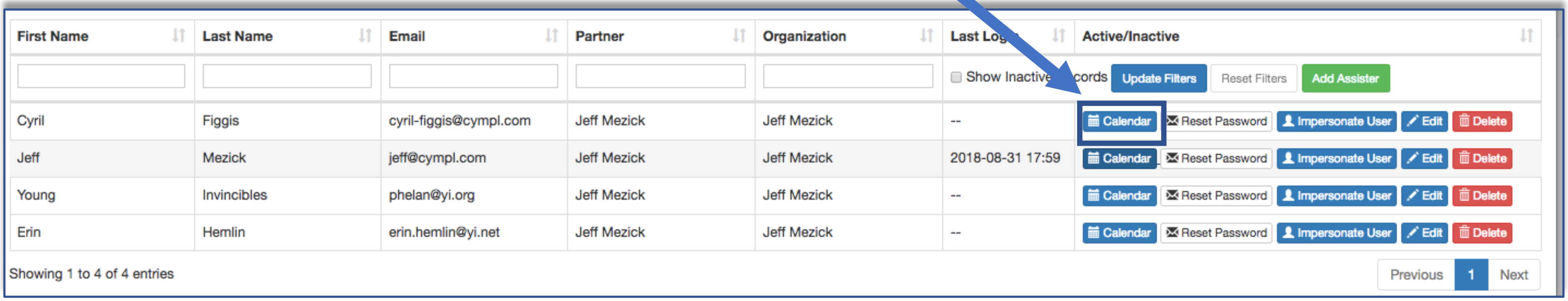
Schedules – Deleting Sessions

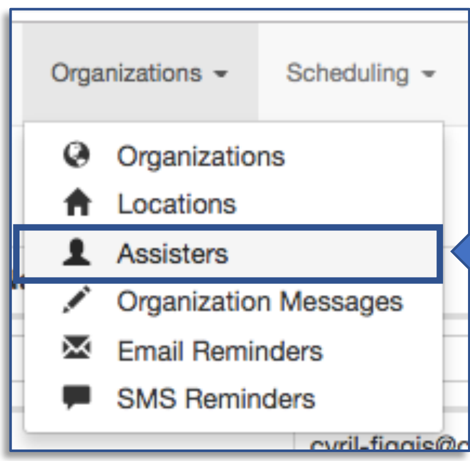
You can easily edit any session without an appointment booked for it. However, once an appointment is booked, if you need to change a session you'll need to delete it. Deleting sessions can also be useful when your schedule changes or when your priority shifts to other locations.



Calendar View

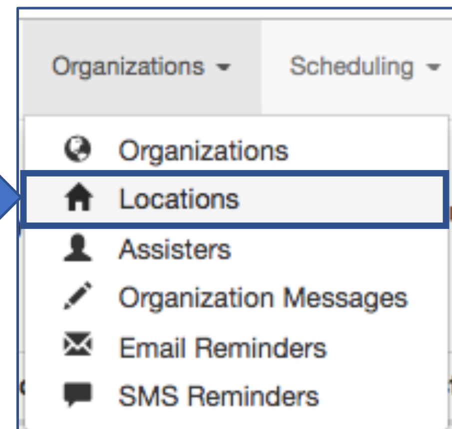
You can view the calendar for each Assister, Location, and Schedule on the Connector. Click on the “Calendar” button on the relevant page to see the Calendar





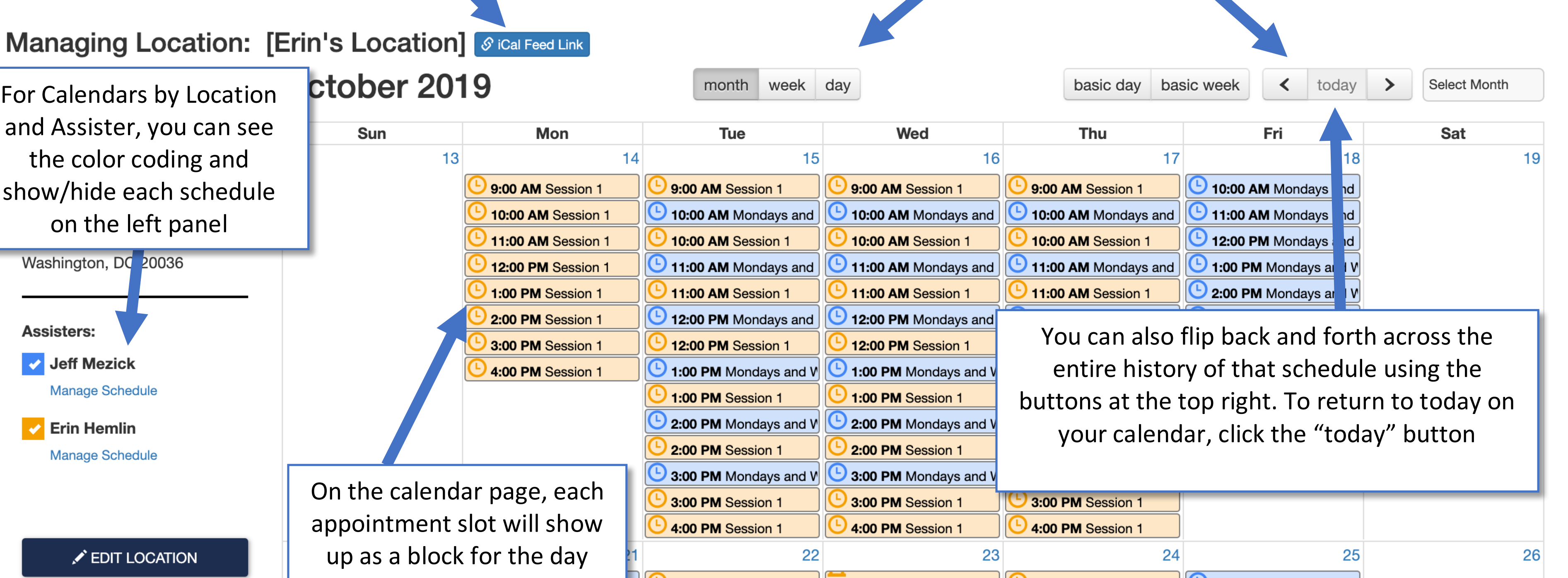
The Calendar by Assister can be found on the Assisters page, which is found under the “Organizations” tab.

The Calendar by Location can be found on the Location page, which is found under the “Organizations” tab.



You can also export any calendar to be synced with your own personal calendar via the "iCal Feed Link". See the "Sync the Connector with your Personal Calendar" section below for more information

You can also change the layout of the Calendar by using the top buttons. "month", "week", and "day" all show a calendar grid, and "basic day" and "basic week" show a grid-less table for those views as well.



For Calendars by Location and Assister, you can see the color coding and show/hide each schedule on the left panel

On the calendar page, each appointment slot will show up as a block for the day and time that it's scheduled for

You can also flip back and forth across the entire history of that schedule using the buttons at the top right. To return to today on your calendar, click the "today" button

Booked Appointment ✖

Assister:
Erin Hemlin (A)

Consumer:
Connector Support 952-210-6863

Location:
Erin's Location
1725 Desales St NW
Washington, DC 20036

Available Languages:
English
Spanish (Español) (B)

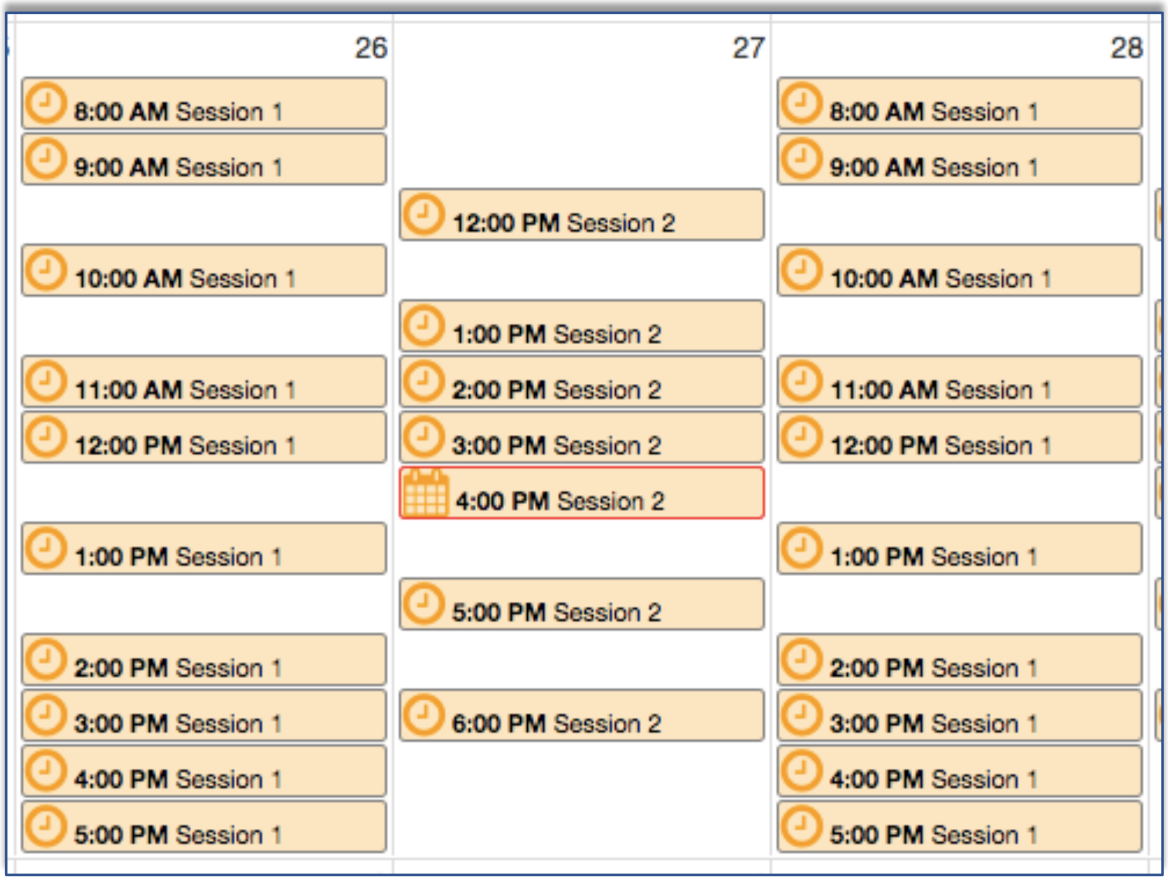
Accommodations:
WheelChair Accessible

Wednesday Oct 23, 2019 (C)
9:00 AM to 10:00 AM

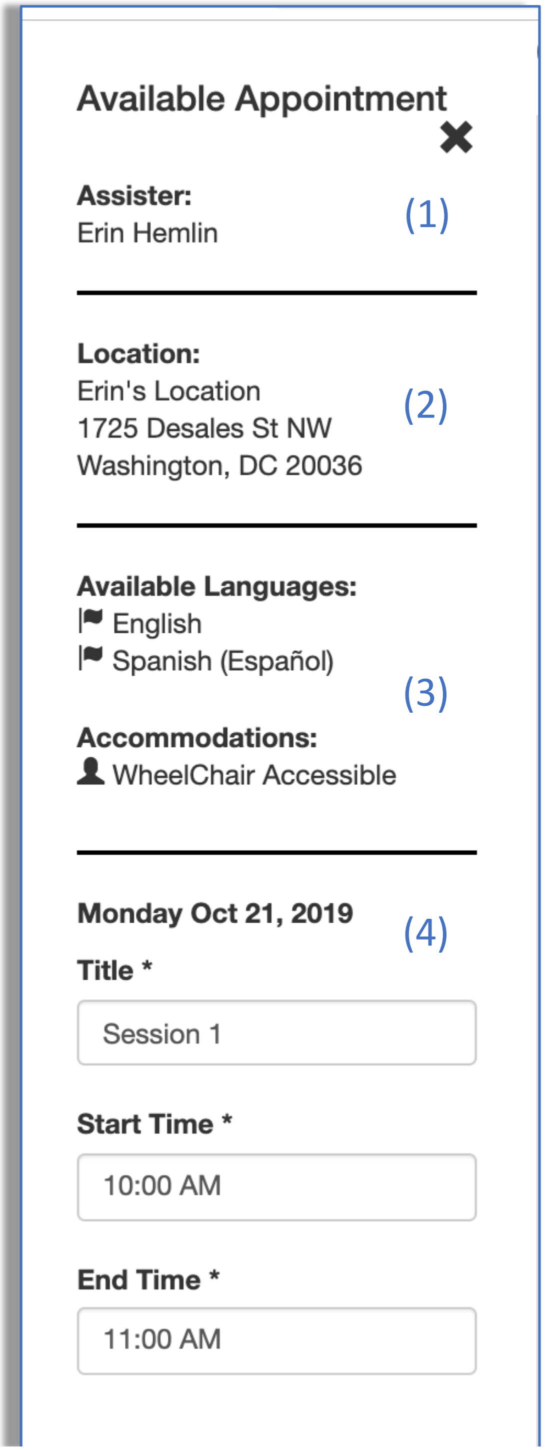
Status:
Scheduled

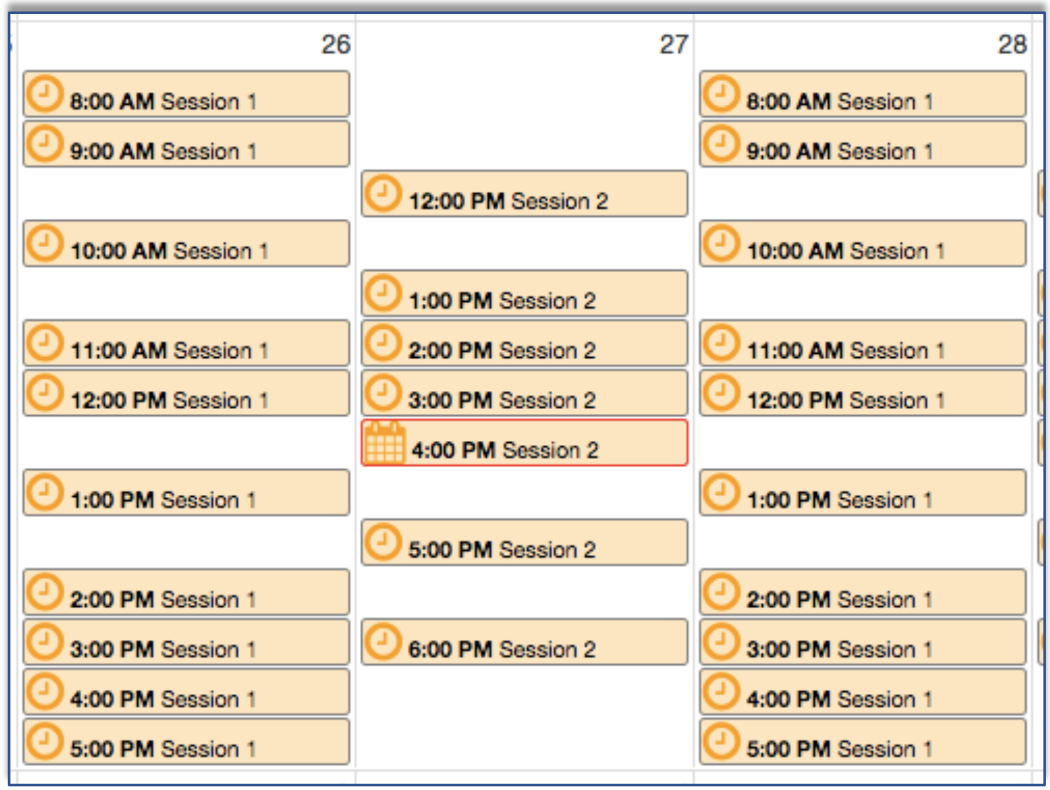
(D)

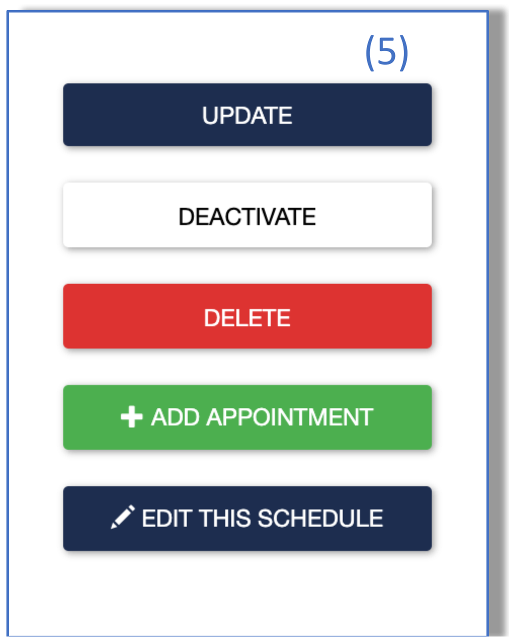
EDIT APPOINTMENT



If an appointment has been booked, you'll see the consumer and assister's information (A), the same information about languages, accommodations (B), date/time (C), and a link to the appointment (D)

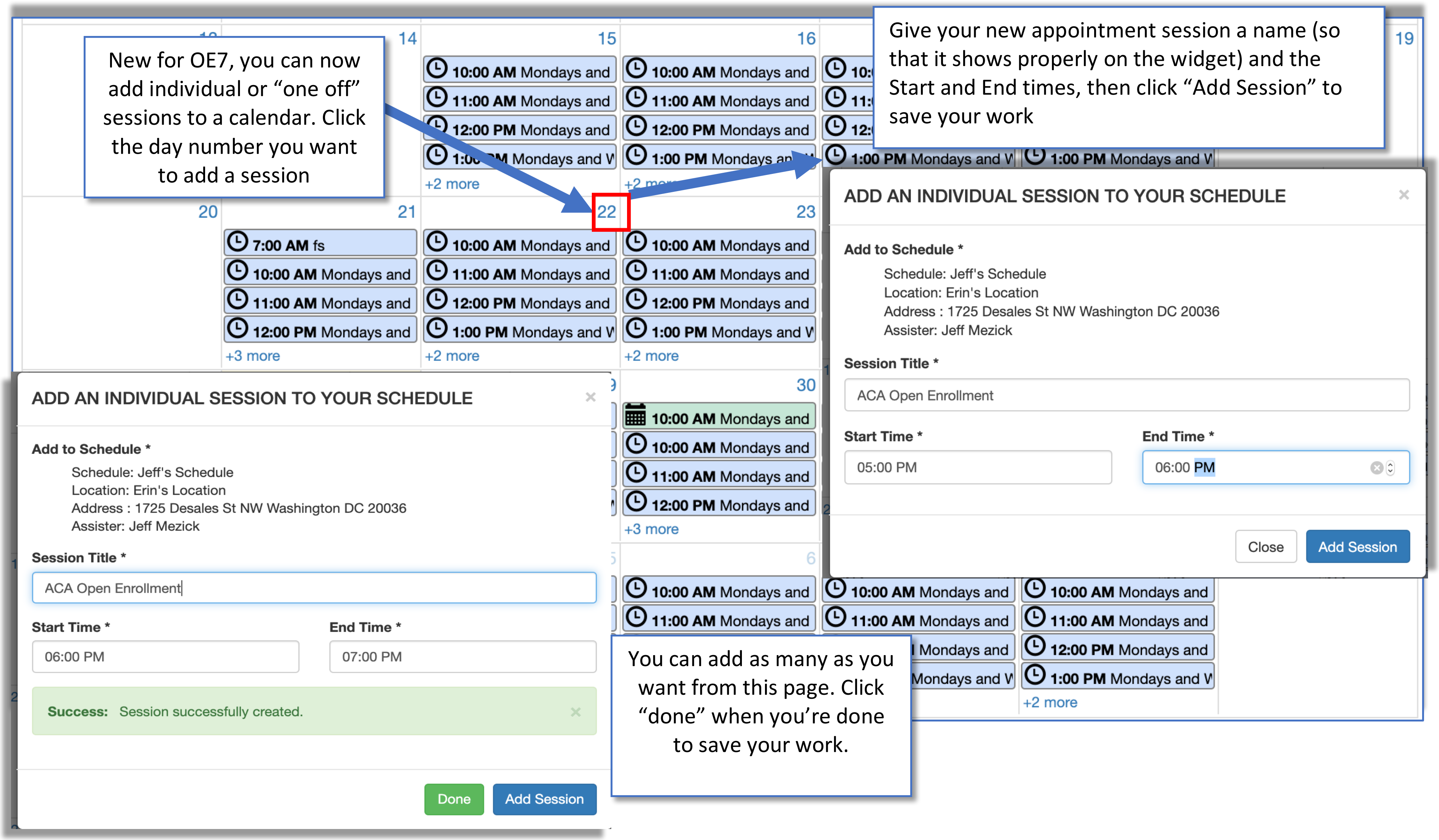






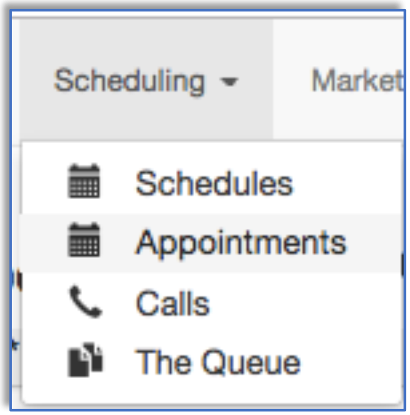
If an appointment time isn't filled with a consumer, the left-hand sidebar will populate with information on the Available Appointment (1), the languages/accommodations offered (3), the day and time of the appointment (as well as the ability to edit those times (4), and the ability to delete, deactivate or book an appointment for that timeslot (5)

Note: "Deactivate" merely makes an individual session unable to be booked unless someone else reactivates it later. "Delete" permanently deletes that individual session.


New for OE7, you can now add individual or "one off" sessions to a calendar. Click the day number you want to add a session
Give your new appointment session a name (so that it shows properly on the widget) and the Start and End times, then click "Add Session" to save your work
ADD AN INDIVIDUAL SESSION TO YOUR SCHEDULE
Add to Schedule *
Schedule: Jeff's Schedule
Location: Erin's Location
Address : 1725 Desales St NW Washington DC 20036
Assister: Jeff Mezick
Session Title *
ACA Open Enrollment
Start Time *
05:00 PM
End Time *
06:00 PM
Close
Add Session
ADD AN INDIVIDUAL SESSION TO YOUR SCHEDULE
Add to Schedule *
Schedule: Jeff's Schedule
Location: Erin's Location
Address : 1725 Desales St NW Washington DC 20036
Assister: Jeff Mezick
Session Title *
ACA Open Enrollment
Start Time *
06:00 PM
End Time *
07:00 PM
Success: Session successfully created.
Done
Add Session
You can add as many as you want from this page. Click "done" when you're done to save your work.

Appointments – Add an Appointment

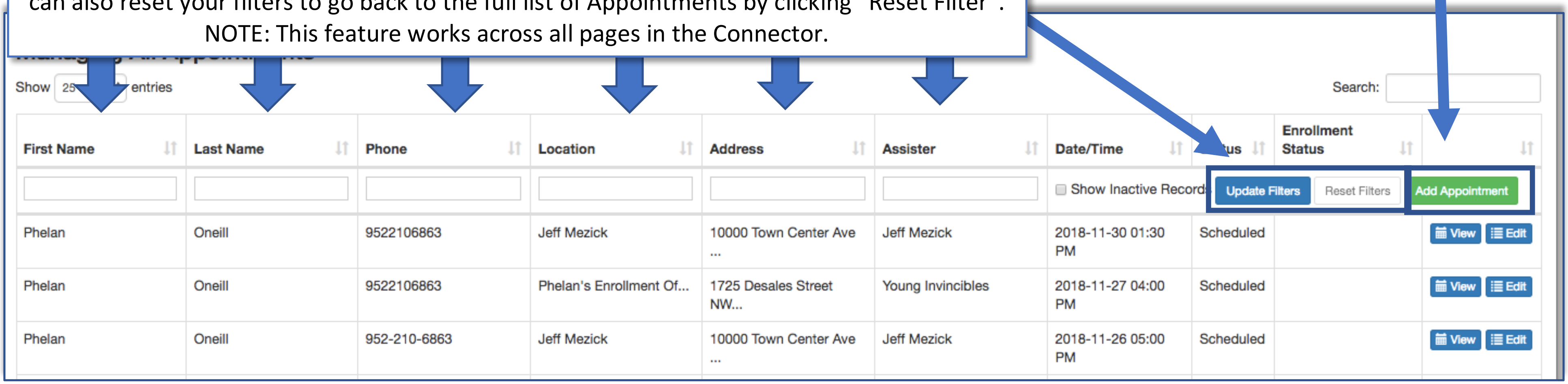
In addition to booking an appointment from a calendar view, you can also add an appointment directly from the Appointments Page



You can find the Appointments page under the "Scheduling" tab

To add a new appointment, click the green "Add Appointment" button

To find a consumer whose already been booked for an appointment, you can use the filters beneath each column header to search, then click "Update Filter" to begin your search. You can also reset your filters to go back to the full list of Appointments by clicking "Reset Filter". NOTE: This feature works across all pages in the Connector.



Show 25 entries

Search:

First Name	Last Name	Phone	Location	Address	Assister	Date/Time	Status	Enrollment Status	
						Show Inactive Records	Update Filters	Reset Filters	Add Appointment
Phelan	Oneill	9522106863	Jeff Mezick	10000 Town Center Ave ...	Jeff Mezick	2018-11-30 01:30 PM	Scheduled		View Edit
Phelan	Oneill	9522106863	Phelan's Enrollment Of...	1725 Desales Street NW...	Young Invincibles	2018-11-27 04:00 PM	Scheduled		View Edit
Phelan	Oneill	952-210-6863	Jeff Mezick	10000 Town Center Ave ...	Jeff Mezick	2018-11-26 05:00 PM	Scheduled		View Edit

When adding an appointment, you're required to enter the following fields:

- Consumer First Name
- Consumer Last Name
- Phone Number

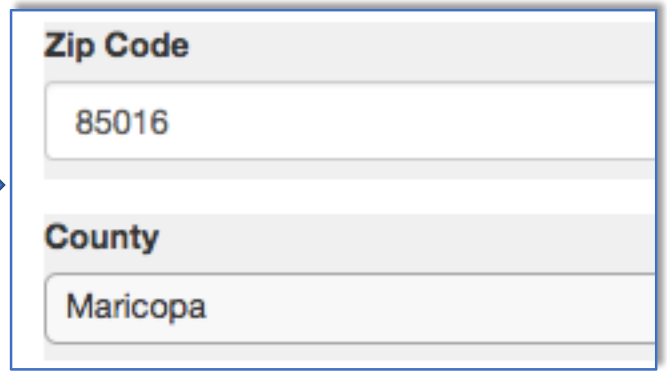
It is also strongly recommended that you enter the following fields:

- Zip code
- County
- Email address

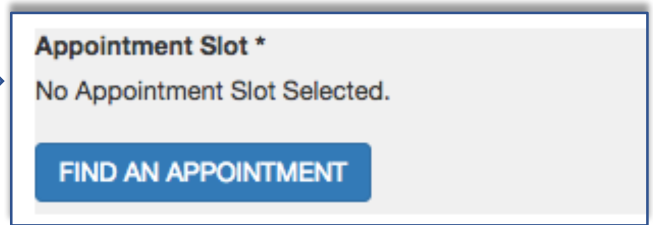
You can also track the following information about consumers:

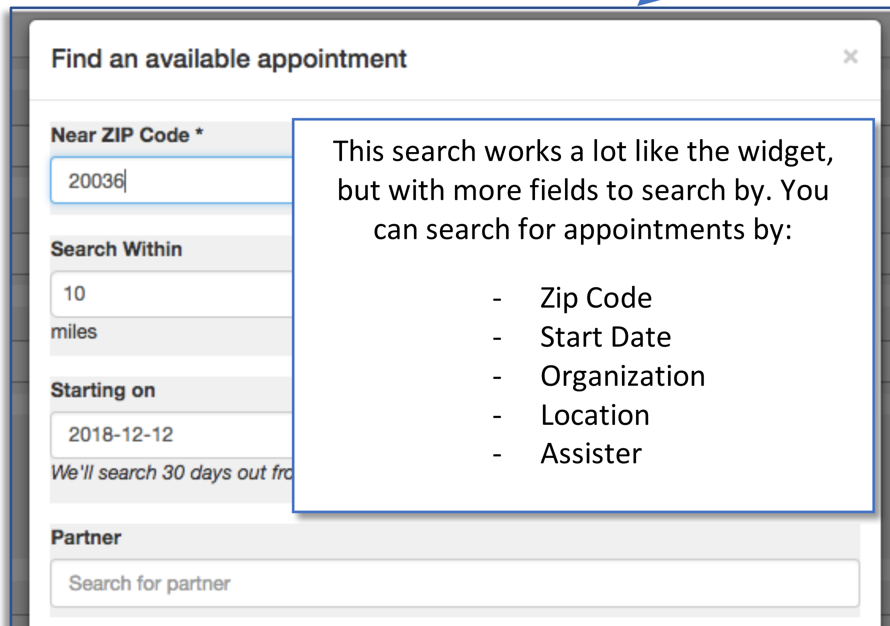
- Street Address
- City

TIP: If you put in the Zip Code, the County field will auto-populate. If the Zip Code spans multiple counties, the user will be able to select the correct one from a dropdown menu



Each appointment requires an Appointment Slot. If you went through the Appointments page, you'll need to click the "Find an Appointment" button to search for a slot. You can also use this to reschedule consumers who have already been booked.

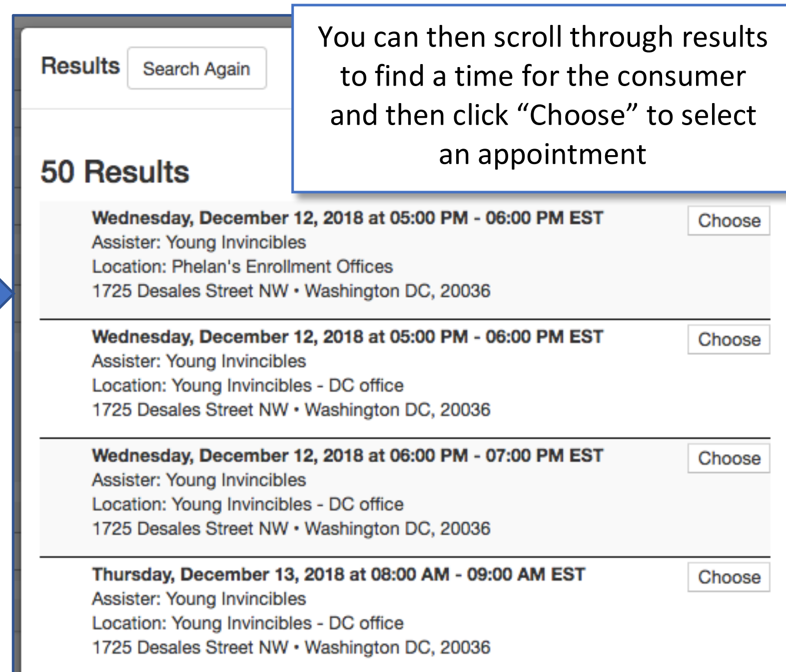




This search works a lot like the widget, but with more fields to search by. You can search for appointments by:

- Zip Code
- Start Date
- Organization
- Location
- Assister

You can then scroll through results to find a time for the consumer and then click "Choose" to select an appointment



Click the green "Create Appointment" button to save your work, or click the blue "Save & Continue Editing" button to continue modifying the appointment.

Appointments – Updating Appointments

One of the most important things you can do after an appointment is to "update" or "close out" appointments. Check with your manager or local Connector admin for more information on the exact reporting fields that you should enter.

Required Fields by Young Invincibles:

There are some basic fields that we at YI use to tell the story of the Connector's success. For an appointment to be "closed out", at a basic level you need to update two fields – **Appointment Status** and **Enrollment Status.**

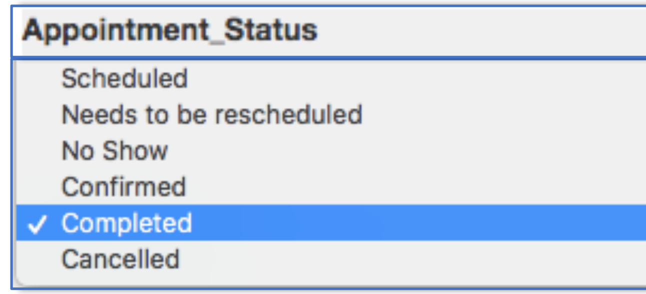
Appointment Status checks whether or not the appointment happened–did the consumer show up or not? **A successfully closed out Appointment has one of the following Appointment Statuses**:

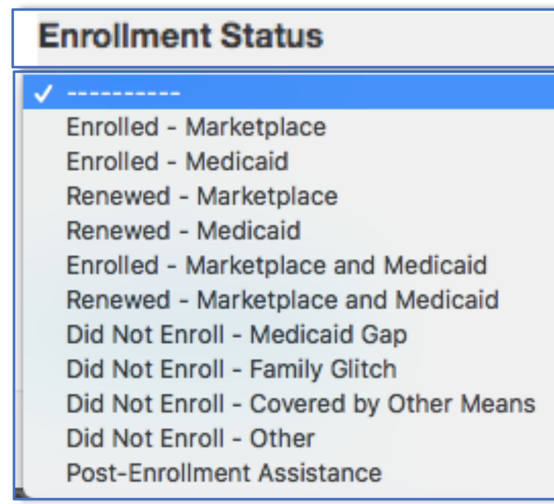
- Completed – the consumer attended the appointment
- Cancelled - the consumer or the assister cancelled the appointment ahead of time
- No Show – the consumer did not show up to the appointment

Enrollment Status tracks the basic outcome of the appointments. The basic options are whether the consumer enrolled, renewed, did not enroll, or if the appointment was post-enrollment assistance (also known as Health Insurance Literacy). **A successfully closed out Appointment has an appointment status if the appointment is completed.**

While not strictly required, the following fields are recommended:

- Email (if the consumer has an email address)
- Zip Code and County



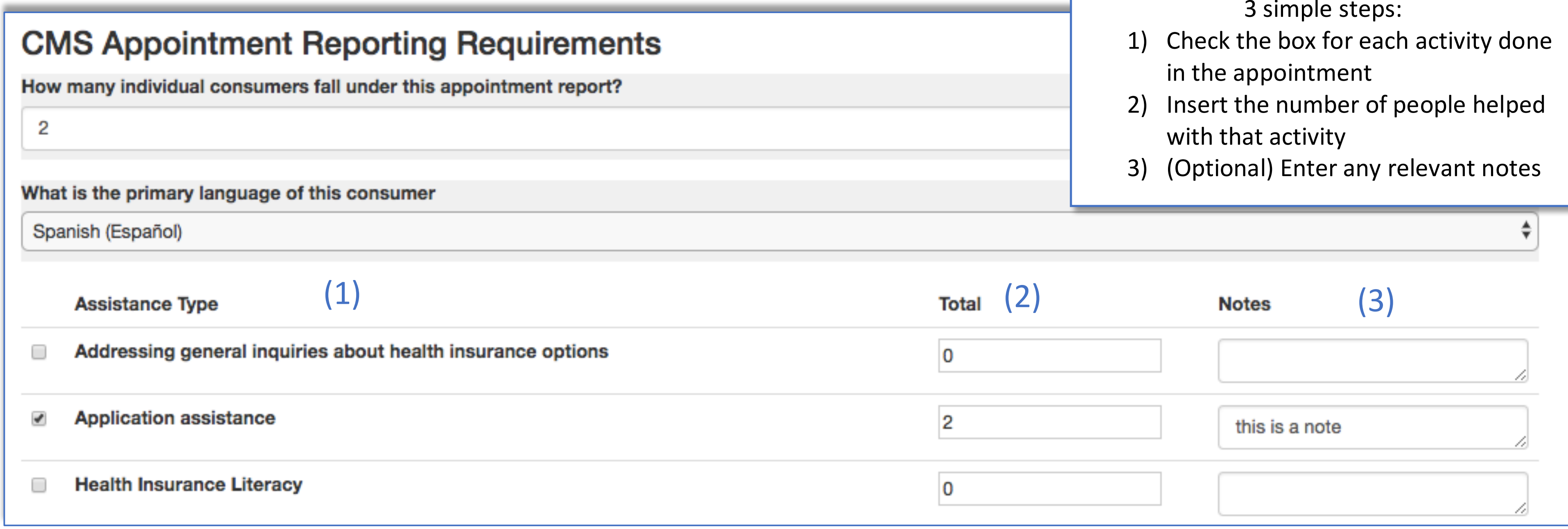


Appointments – Navigator Reporting

Most Navigator groups on the Connector require their assisters to use this section to track key outcomes for their regular reports to CMS. If you are unsure if this applies to you, contact your manager or local Connector admin

Completing the CMS Appointment Reporting Requirements section takes only 3 simple steps:

1) Check the box for each activity done in the appointment
2) Insert the number of people helped with that activity
3) (Optional) Enter any relevant notes



CMS Appointment Reporting Requirements

How many individual consumers fall under this appointment report?

2

What is the primary language of this consumer

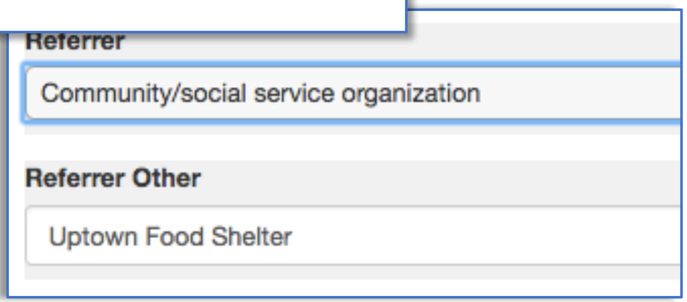
Spanish (Español)

	Assistance Type (1)	Total (2)	Notes (3)
☐	Addressing general inquiries about health insurance options	0	
☑	Application assistance	2	this is a note
☐	Health Insurance Literacy	0	

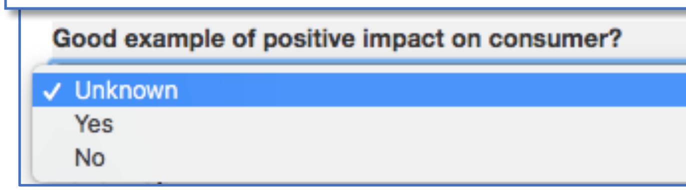
Appointments – Other Reporting Fields

In addition to the key outcomes mentioned above, you can track a lot of other useful information for each consumer appointment, including referral tracking, story collection, notification opt-out, and flagging consumers who need follow-ups.

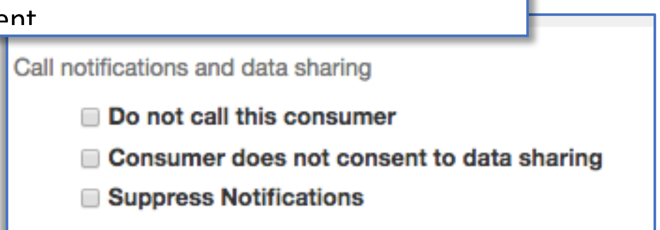
1) Referral tracking – How are consumers finding you? This data can be used to demonstrate the success of outreach to funders/staff. You can use the "Referral Other" line to track more specific sources over time



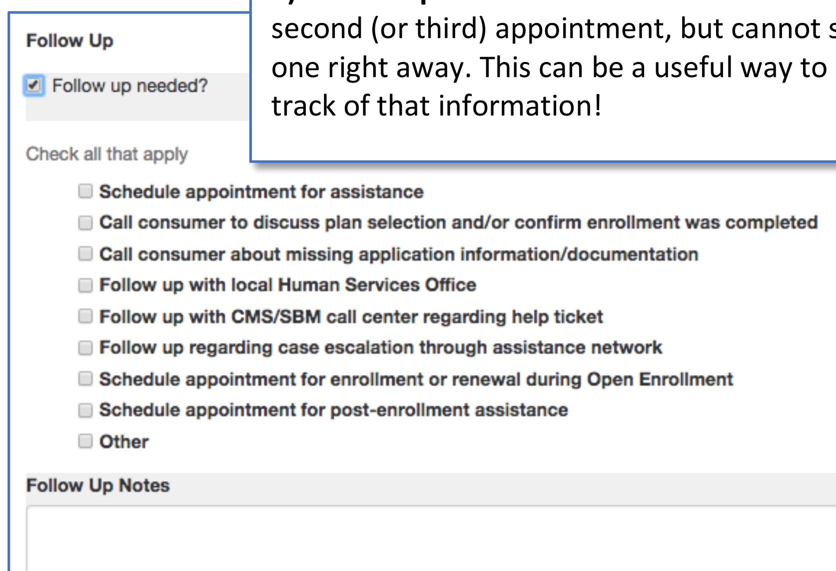
2) Story collection – a text box will appear if "yes" is selected, allowing you to record positive consumer stories to pitch to reporters and/or for other work your organization may be doing



3) notification opt-out – If the consumer does not want to receive updates from YI about health insurance, important deadline reminders and how to use insurance, they can opt-out of data sharing. You can also check "suppress notifications" so that the consumer doesn't get email or text reminders about their appointment



4) Follow-ups – Sometimes consumers need a second (or third) appointment, but cannot schedule one right away. This can be a useful way to keep track of that information!



Virtual or Remote Appointments

We are always looking for new or innovative ways to use the Connector. Have an idea worth sharing, or looking for advice on how to implement an idea? Contact ConnectorSupport@younginvincibles.org and we'll be happy to work with you.

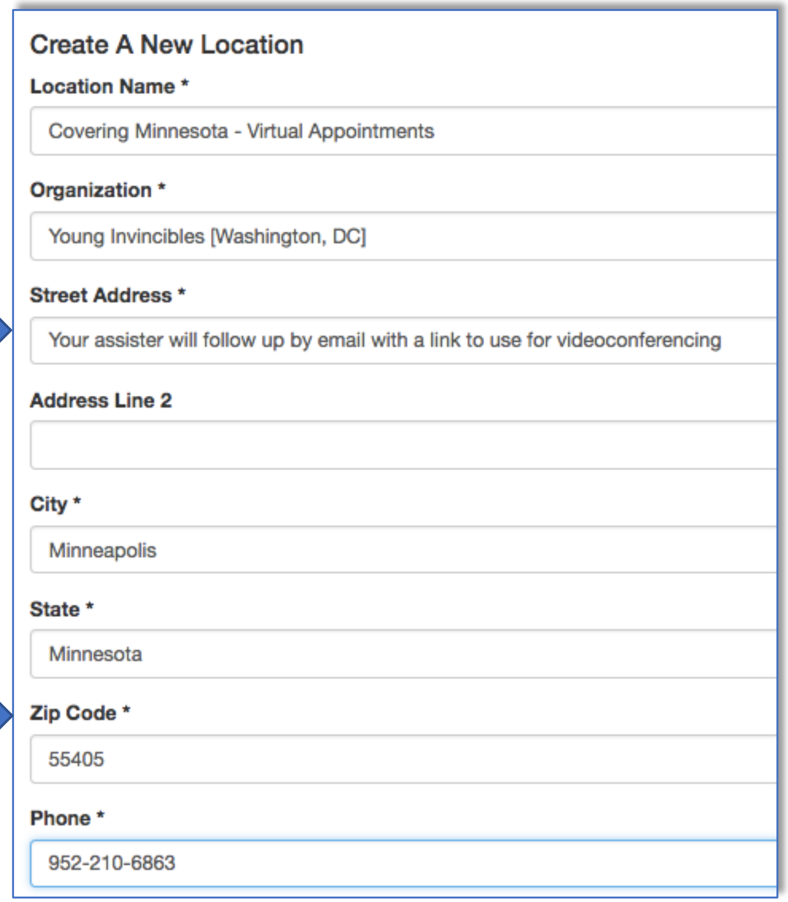
Did you know – you can use the Connector to promote phone or other remote/virtual appointments in the Connector? Several Connector organizations used this method to track, manage and promote such occurrences in the Connector. If you're trying to use this method to share one location across several organizations, contact ConnectorSupport@younginvincibles.org for more information.

From the Locations page, create a new Location and give it a name that includes the type of remote appointments you're doing (e.g. "Virtual Appointments" or "Phone Appointments")

Then, in the first line of the address, include instructions/details of how the appointment will occur. The "Street Address" line is required, but it does not need to be a real physical address.

To make the location searchable (either on the Widget or on the admin side), you'll still need to enter a Zip Code. We recommend picking a centrally located Zip Code to make it more easily findable, but it's up to you.

The Phone number should be either the assister's number or a main office line/hotline for your organization



Create A New Location

Location Name *
Covering Minnesota - Virtual Appointments

Organization *
Young Invincibles [Washington, DC]

Street Address *
Your assister will follow up by email with a link to use for videoconferencing

Address Line 2

City *
Minneapolis

State *
Minnesota

Zip Code *
55405

Phone *
952-210-6863

A key decision is whether or not to mark these locations as private

☐ Private

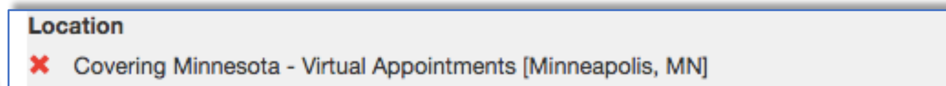
You should make the location **public** if:

- You want consumers to book these appointment slots on their own
- The assister(s) responsible for the schedule(s) at this Location do not have other schedule(s) with overlapping times that are already public
- Remote/Virtual Appointments are a major part of your enrollment strategy

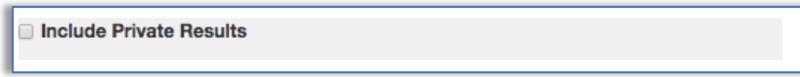
You should make the location **private** if:

- You are still experimenting with virtual/remote appointments and want to keep the volume lower
- The assister(s) responsible for the schedule(s) have other schedule(s) with overlapping times that are already public
- Remove/Virtual Appointments are a small part of your enrollment strategy and you want to push people to in-person appointments

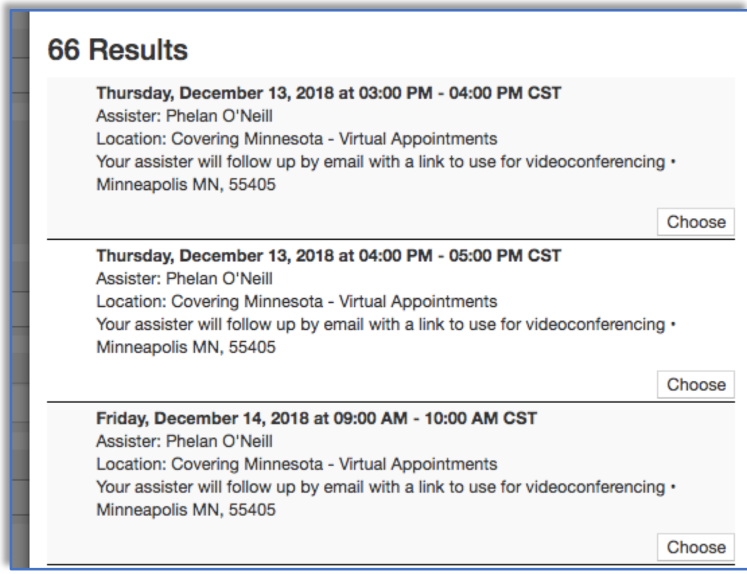
After creating your location, you'll need to set up your schedule(s) the same as you would a normal schedule. Then, to find appointments at this new location the admin, click the "Find an Appointment" button when creating an appointment. Note: You'll need to enter a zip code for your search to work properly



Then, enter the name of the Location in the "Location" field and select it from the dropdown list



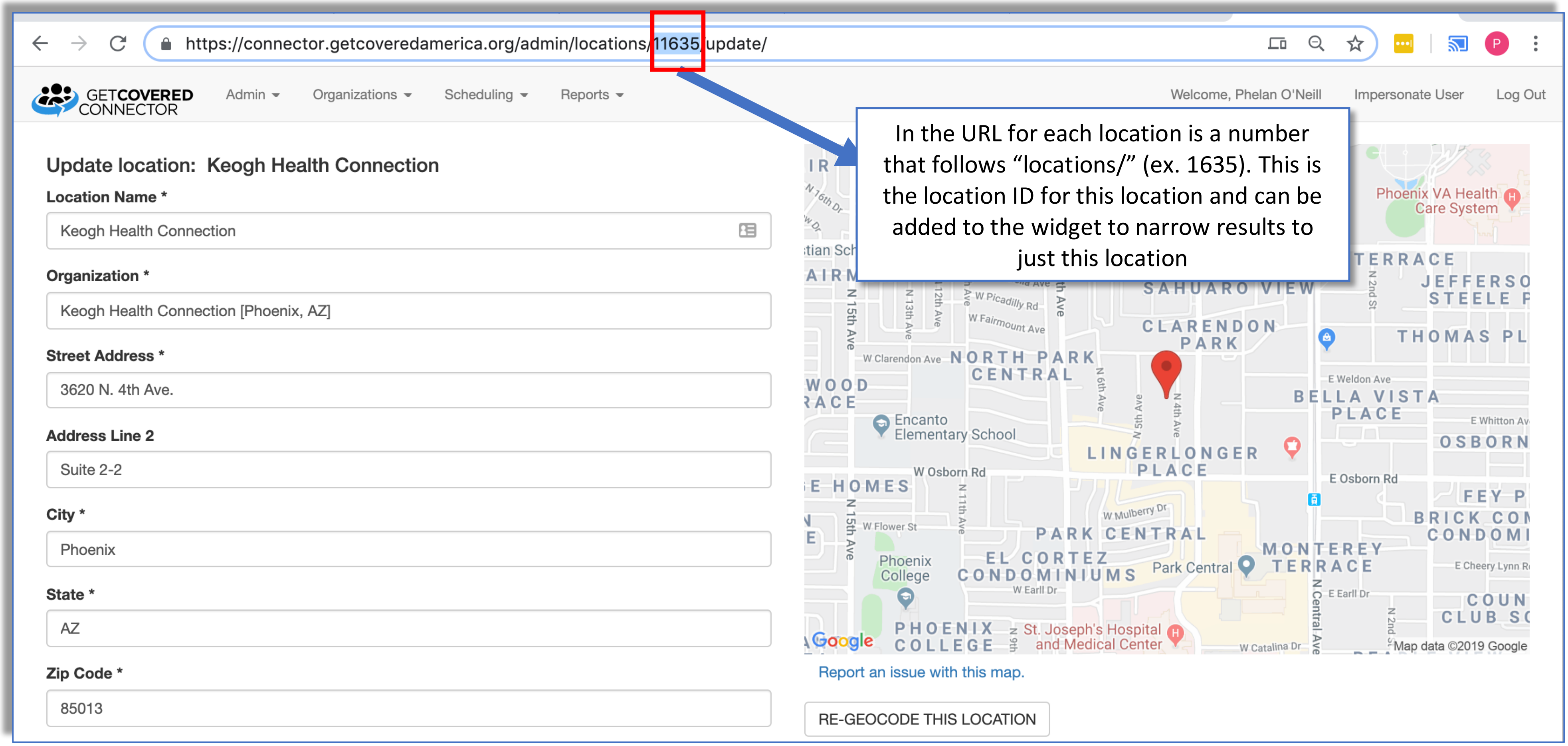
Note: if you made the Schedule or Location as private, you'll need to check the "include Private Results" box before searching



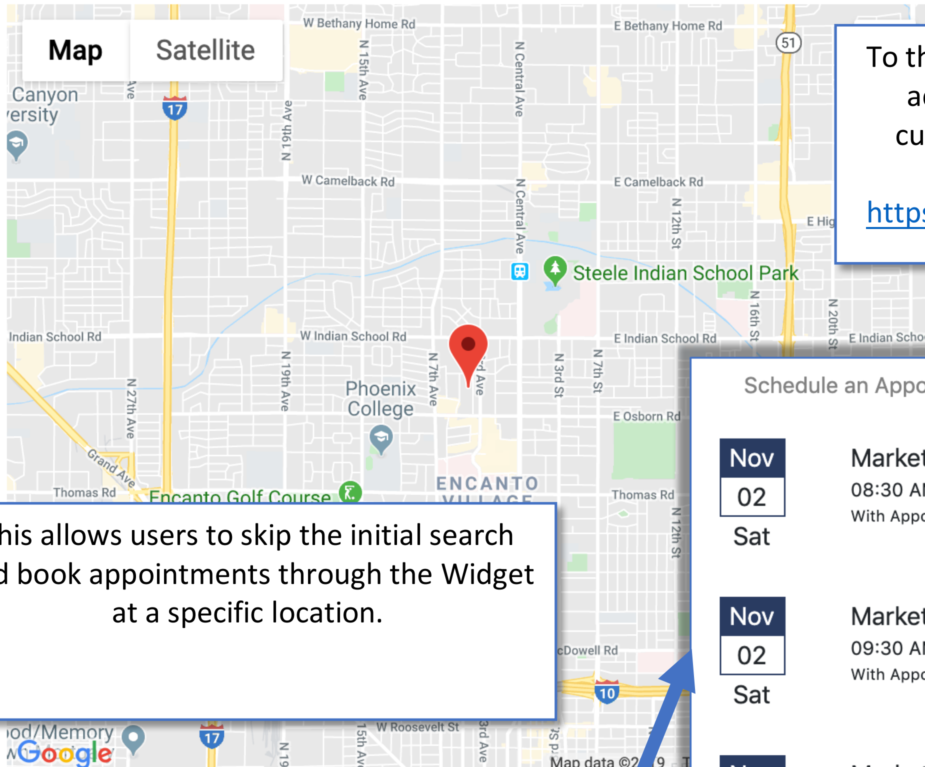
Once you click "search", you'll see your results with just the location you've selected. Choose the one that works and finish booking the appointment!

Widget RSVP Links

Returning for OE7 is the ability to have "RSVP" Links to specific locations in the Connector. This can be used to promote enrollment events, specific locations based on a consumer's geography or even when doing outreach at a Community Center or College Campus when you'll be holding enrollment sessions at a later date.



In the URL for each location is a number that follows "locations/" (ex. 1635). This is the location ID for this location and can be added to the widget to narrow results to just this location widget.getcoveredamerica.org/?LOCATION=11635



To the normal widget link (widget.getcoveredamerica.org/) add **?LOCATION={location_id}** to the URL to get your custom RSVP link. So for example, if your Location ID is "11635", the URL becomes https://widget.getcoveredamerica.org/?LOCATION=11635/

This allows users to skip the initial search and book appointments through the Widget at a specific location.

Keogh Health Connection

3620 N. 4th Ave., Suite 2-2, Phoenix, AZ, 85013
602-266-0397

Schedule an Appointment Online

Nov 02 Sat	Marketplace 08:30 AM - 09:30 AM MST With Appointments For Keogh	SCHEDULE ONLINE
Nov 02 Sat	Marketplace 09:30 AM - 10:30 AM MST With Appointments For Keogh	SCHEDULE ONLINE
Nov 02 Sat	Marketplace 09:30 AM - 10:30 AM MST With Appointments For Keogh	SCHEDULE ONLINE

Connector Reports Overview

Reports are a powerful part of the Connector. With the Reports page you can gain key insights on Connector Data to make key decisions about where to devote time/resources and tell the story of your success(es)

Reports
- Appointment Detail
- Upcoming (48H) Appointments
- Unclosed Appointments

<u>Appointment Detail:</u> Shows data on Appointment outcomes. Default is the past 7 days

<u>Upcoming (48H):</u> Shows upcoming appointments with links to edit them

<u>Unclosed Appointment:</u> Compiled report of all non-closed appointments with direct links to edit them

Users can narrow or modify reports by a number of key fields including Date, Organization, Location and Assister. Then click the blue "Update Filters" button to run the new report and fetch the new data. Users can clear or reset these filters by clicking the "Reset Filters" button.
Users can also download these reports to further analyze their data by clicking the green "DOWNLOAD" button

Appointment Detail Report

2019-10-21	2019-10-28	Search for organizatior	Search for location	Search for assister	Search for partner	Update Filters	Reset Filters	DOWNLOAD

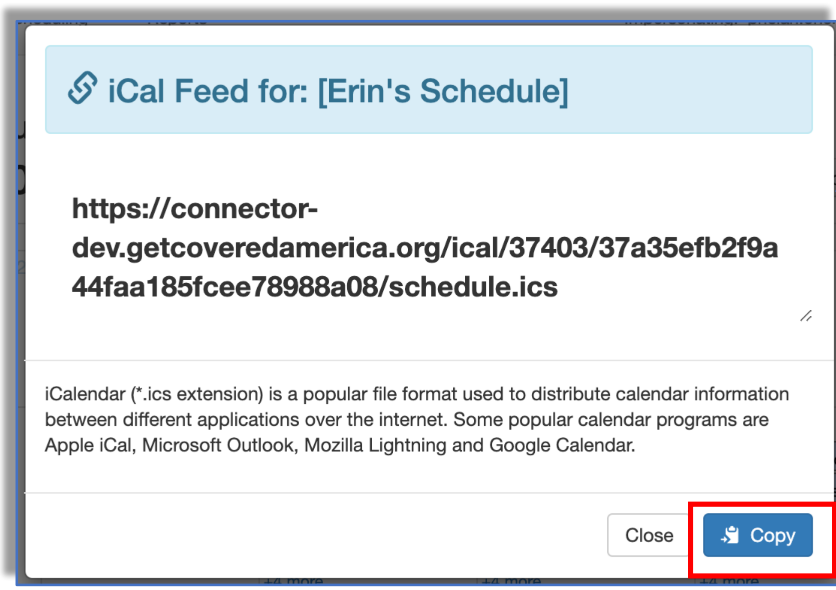
Start Date	End Date	Organization	Location	Assister	Partner	Appointment Status	Enrollment Status
2019-10-28 11:00 AM	2019-10-28 12:00 PM	Young Invincibles Trai...	Phelan's Location	Connector Support	z Young Invincibles	Scheduled	
2019-10-25 02:00 PM	2019-10-25 03:30 PM	Young Invincibles Trai...	Phelan's New Location	Connector Support	z Young Invincibles	Scheduled	
2019-10-23 09:00 AM	2019-10-23 10:00 AM	Young Invincibles Trai...	Phelan's Location	Connector Support	z Young Invincibles	Scheduled	
2019-10-23 09:00 AM	2019-10-23 10:00 AM	Young Invincibles Trai...	Erin's Location	Erin Hemlin	z Young Invincibles	Scheduled	

Sync the Connector with your Personal Calendar (Step One)

New for OE7 – Users are now allowed to sync any Connector Calendar (Schedule, by Assister, or by Location) they'd like with their personal calendar system. In your calendar, you will see the Consumer name, Assister name, Location as well as the consumer's phone number and a link to the appointment.

Step 1:

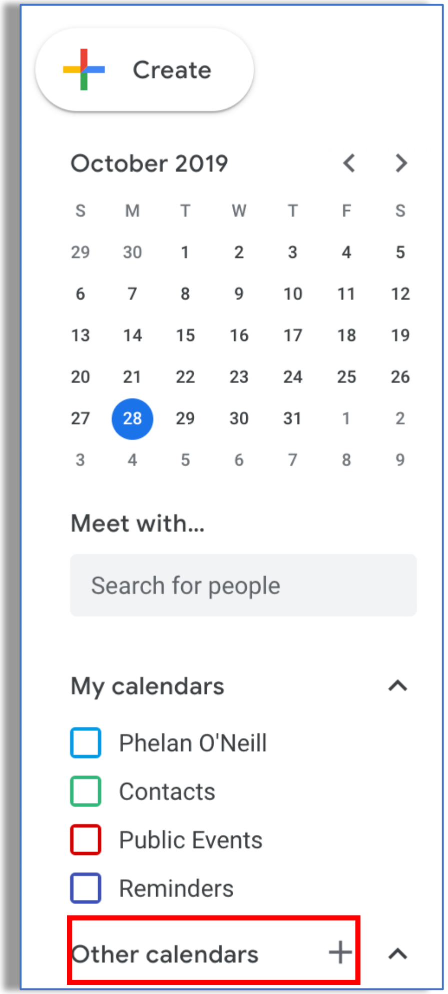
Regardless of what Calendar app you use, you'll first need to get the iCal "feed" or link for the Calendar. You can find this via the iCal button on the top of every Calendar view



Step 2:

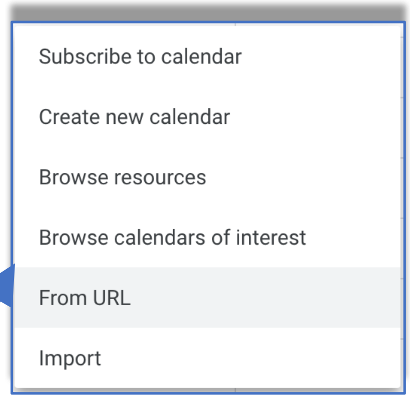
When the window opens with the URL, click the "copy" button to save it to your clipboard. You'll then want to open up your calendar app.

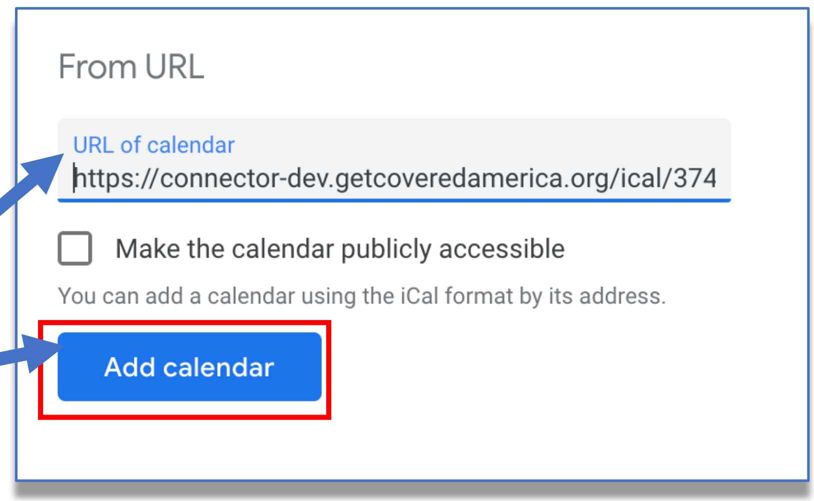
Sync the Connector with your Personal Calendar (Google Calendar)



Step 3&4:

From your Calendar, click the "+" next to "Other calendars." You'll then see a menu of methods to add a new calendar. Click "From URL" from those options.





Step 5:

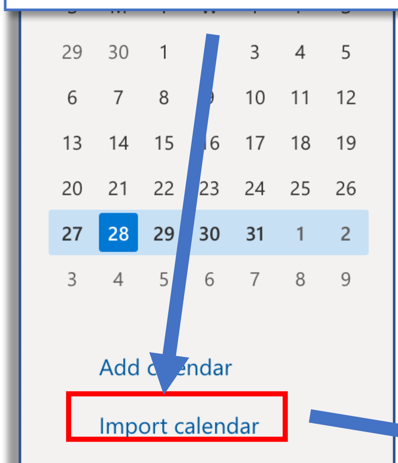
Lastly, paste the URL you got from the Connector into the "URL of calendar" box and click "Add calendar" to sync your calendar.

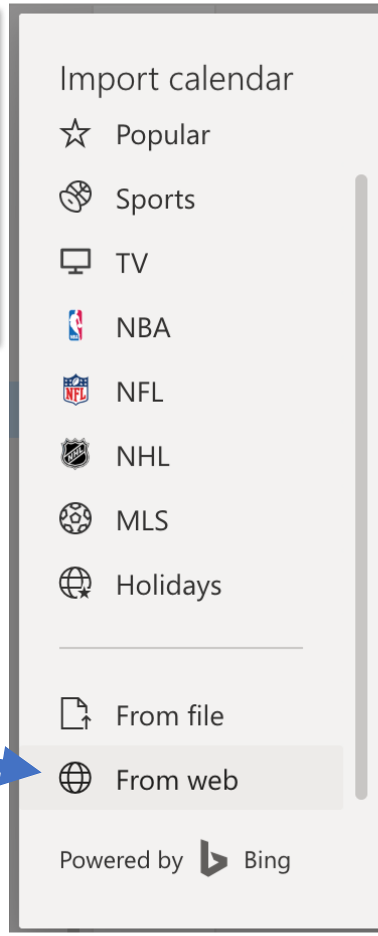
Sync the Connector with your Personal Calendar (Microsoft Outlook)

Step 3&4

Then, beneath the mini calendar, click the “Import calendar” button

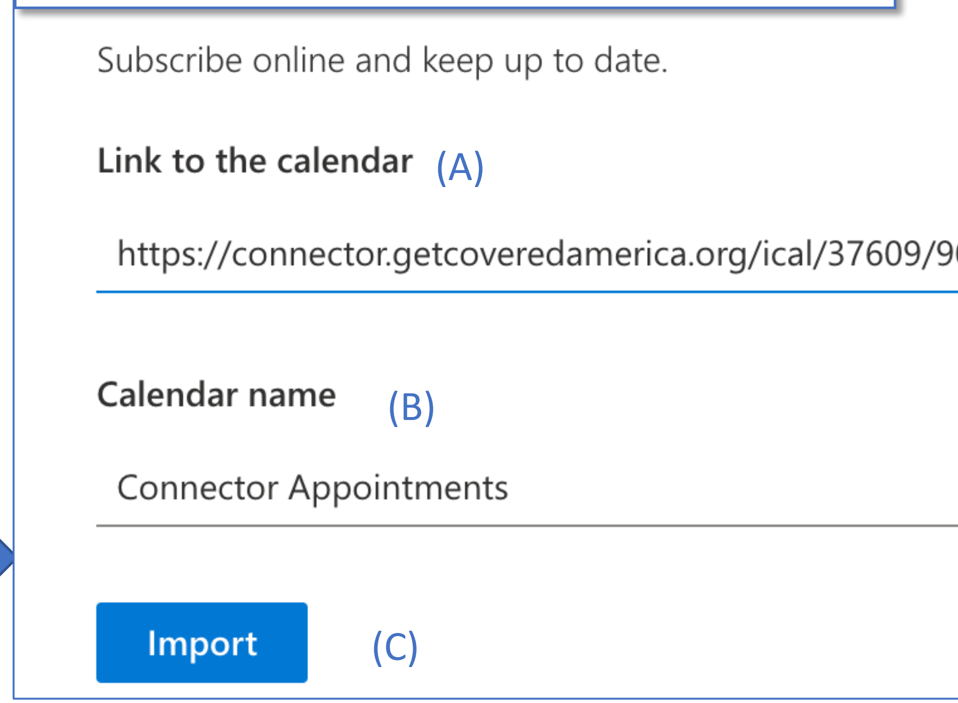
Then select “From web” to enter the URL



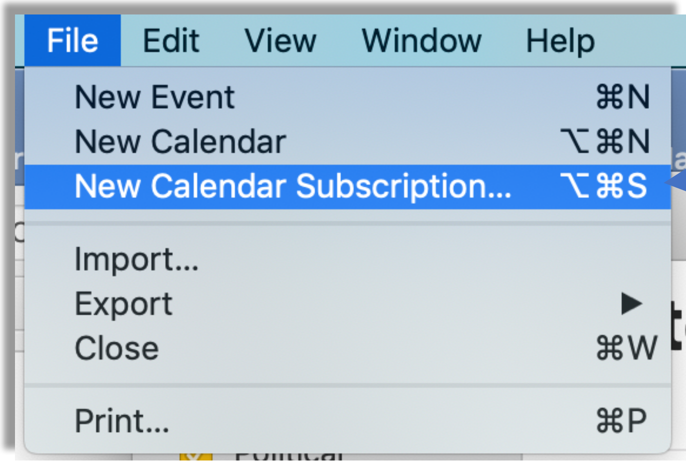


Step 5

Enter the Link from the Connector (A), the name of the schedule (B) and then click Import (C)



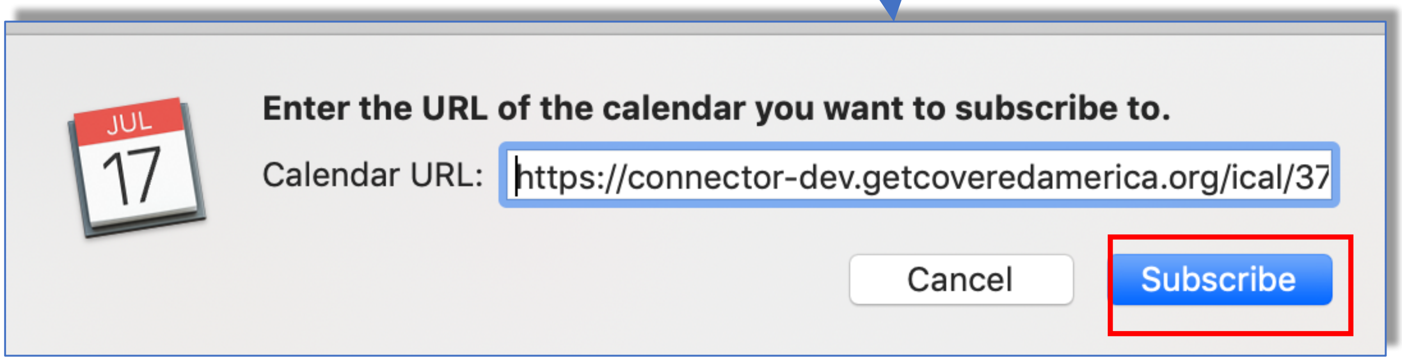
Sync the Connector with your Personal Calendar (Apple Calendar)



Step 3&4

From the “File” menu, click “New Calendar Subscription”.

Then past the URL you got from the Connector into the “Calendar URL” box and then click the blue “Subscriber” button.



Sync the Connector with your Personal Calendar FAQ

Question	Answer
1) I just added an appointment to the Connector but it won't show up in my Calendar	Different Calendar Apps behave different ways, but you should see appointments show up within about an hour on your personal calendar
2) I don't want my calendar cluttered, how can this help me?	We will only add booked appointments to your Calendar, allowing you to see what matters on one screen
3) It's been several hours and my Calendar won't sync.	New events should show up generally in the first hour or so, but may take anywhere from 8-12 hours for your Calendar app to sync. In some cases it can take up to 24 hours to see changes
4) I don't see <name of Calendar app> here or I am having issues with <name of Calendar app>	Please email ConnectorSupport@younginvincibles.org with the name of your Calendar app. We currently support Outlook, Google Calendar and Apple Calendar and may add new ones depending on interest and complexity.

Making the most of the Connector – Connector Support

We work tirelessly to make the Connector a great experience for everyone, and this user guide is a small part in helping to achieve that goal. But, from time to time, Users need help troubleshooting or have a question about how something works. This is designed to make getting help easier for everyone.

Step 1: Check the Manual

Even if you're a savvy Connector pro, sometimes this guide still has the answer! If this doesn't solve your problem, go to step 2

Step 2: Talk through your problem step-by-step with your manager, local Connector admin and/or a coworker

They are more likely to help you sooner and can provide real examples of how others have done the same thing in your area. Plus, walking through things step-by-step may uncover something you skipped or forgot!
If this doesn't solve your problem, go to step 3

Step 3: Contacting Connector Support

Send an email to ConnectorSupport@younginvincibles.org with your problem. The fastest way to get your problem solved when emailing Connector Support is to follow these best practices

Best Practices for Connector Support

1) **Be Descriptive** – both in your subject and email body. "X Location isn't showing up on the widget and isn't marked as private" helps narrow down potential solutions a lot better than "My Location isn't working properly".

2) **Screenshots are good, links are better** – Screenshots (or pictures) are really useful to see what's happening, but what makes things even easier is having a link to the exact place you're having issues with. Every record in the Connector (Users, Schedules, Locations, Appointments, etc) have a unique link that allows us to not only see your exact problem, but see what's happening behind the scenes more easily

3) **Be Patient** – We try to reply to support issues as quickly as possible. But sometimes we can't fix your problem right away or are busy helping other Users. We have a 24-hour turnaround policy, so we ask you wait a day before following up again if you haven't heard back from us.

Thank you!!!

On behalf of everyone at Young Invincibles, thank you for the tireless work you do in your communities. Assisters like you make a difference in countless peoples' lives, and we are all grateful for everything you do to help individuals and their families get quality, affordable health insurance.

-- Phelan O'Neill and the Connector Support Team