

Behavior Change Protocol Guide

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1 Preface

This guide explains how to perform the different tasks necessary to define, test and launch a Behavior Change Protocol (BCP) for transmission to patients.

1.1 Audience

This guide is intended for Healthways International personnel who will be defining and testing the different messaging protocols that will be used in Embrace 6.5. While this guide does not assume any knowledge of Behavior Change Protocols, it does assume that the reader is **familiar with Microsoft Excel** and with the following Embrace administrative modules:

- **Email Template Editor**
- **Fulfillment Maintenance**
- **Population Manager**

To learn more about the Email Template Editor or the Fulfillment Maintenance module, see the *Healthways Embrace Fulfillment Guide*. To learn more about the Population Manager module, see the *Healthways Embrace Administration Guide*.

2 Introduction to Behavior Change Protocol Concepts

Before defining a Behavior Change Protocol (BCP), there are a few concepts that you should understand.

First, a BCP is really a kind of message protocol. In Embrace, a *message protocol* is a sequence of related messages that are sent to a patient. While in 6.5, the only kind of message protocol that is supported is the Behavior Change Protocol, other kinds of message protocols may be added in the future.

Second, a message protocol has a particular *message pattern*. A message pattern consists of the different messages to be sent on different days, beginning on the day that a BCP is activated for a patient. The different messages in a message pattern typically correspond to different moments in a patient's struggle to change his or her behavior. The message sent on day 1 - the day after the patient has agreed to receive BCP messages – might be an introductory message of some sort. Subsequent messages are sent to offer encouragement to the patient. Each of these messages is sent at a specific number of days following the activation of the BCP for the patient and is intended to provide a timely psychological boost. (This is the reason why BCPs are also known as *boosters*.)

3 Creating a Behavior Change Protocol

Defining a BCP requires performing several tasks that on the surface may seem unrelated. These tasks might be broken down into the following groups:

- Preliminary Tasks
 - Creating BCP Document Types

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- Creating BCP Email Templates
 - Specifying the BCP
 - Creating a Message Pattern
 - Creating a CSV File With Messages
 - Defining a Message Pattern in Embrace
 - Defining the BCP Itself
 - Defining a Care Object With Send Protocol Message as an Effect

This section describes how to perform these different tasks. **Perform the tasks in the order in which they are presented.**

NOTE: If necessary, you can create a CSV file that contains the messages for a BCP prior to creating document types and email templates. You will, however, need to finish work on the CSV file prior to defining a message pattern in Embrace. The document types, email templates and message pattern **must all be created BEFORE** you define the BCP itself.

3.1 Creating the BCP Document Types

Open the **Fulfillment Maintenance** module and create two distinct document types – a BCP welcome document type and a BCP message document type. **You need to create two different document types to support the two different email templates for the messages to be sent.** Since the welcome BCP message differs substantially from all subsequent BCP messages, two different email templates and two different document types are necessary.

As described in Chapter 1 of the *Healthways Embrace Fulfillment Guide*, a document type defines certain properties for a document that is sent to a patient.

3.1.1 Creating the BCP Welcome Document Type

To create a document type for a BCP welcome message, use the following procedure:

1. Open the **Fulfillment Maintenance** module.
2. Click the **Document Type** tab.
3. Click the **New** button at the bottom of the tab. (You may need to maximize the size of your screen to display the **New** button.) Embrace displays the **Add New Document Type** dialog box.

Figure 1 Add New Document Type Dialog Box

4. Enter a name in the **Name** field.
5. Enter a description in the **Description** field.
6. In the **Communication Content Type** field, select **Well-Being Boosters**. (This item may be called **Protocol Communication** on your system.)
7. In the field **Requires Email Template**, select True.
8. In the field **Parent Document Type Name**, enter **GenericEmail**.
9. If you want, you can enter a value in **Encounters Localized Name** field. The text entered here appears as mouse over text in the Encounter Timeline of the patient worksheet when a document of this type is sent to the patient. This string appears when the mouse hovers over the envelope icon.
10. You can accept the default values for the other fields.

3.1.2 Creating the BCP Message Document Type

To create a document type for all other BCP messages, use a procedure identical to that described in section 3.1.1, taking care to give the document type a different name.

3.2 Creating the BCP Email Templates

After creating the document types, you can create the two email templates. This section describes how to use the **Email Template Editor** module to do this. One of the email templates will define the BCP welcome message. This template will be defined for the BCP welcome document type created above in section 3.1.1.

The other email template will be a wrapper for the protocol message and will consist only of the {Protocol Message} token. This template will be defined for the BCP message document type created above in section 3.1.2.

3.2.1 Creating an Email Template for the Welcome Message

To create an email template for the welcome message, use the following procedure:

1. Open the **Email Template Editor** module.
2. Click the **New** button at the bottom of the tab. Embrace displays the **Add Email Template** dialog box.
3. Select **Email** in the **Template Type** field.
4. Enter a name in the **Name** field.
5. Enter a description in the **Description** field.
6. In the **Format** field, select **HTML**.
7. In the **Contract** field, use the drop down list to select the contract for which this email template is defined.
8. In the **Document Type** field, select the document type that you created in section 3.1.1.
9. On the **Template** tab, enter a subject for the welcome email in the **Subject** field.
10. On the **Template** tab, enter the text of the welcome message in the area reserved for this purpose. Figure 2 displays how the **Add Email Template** dialog box might appear at this point.

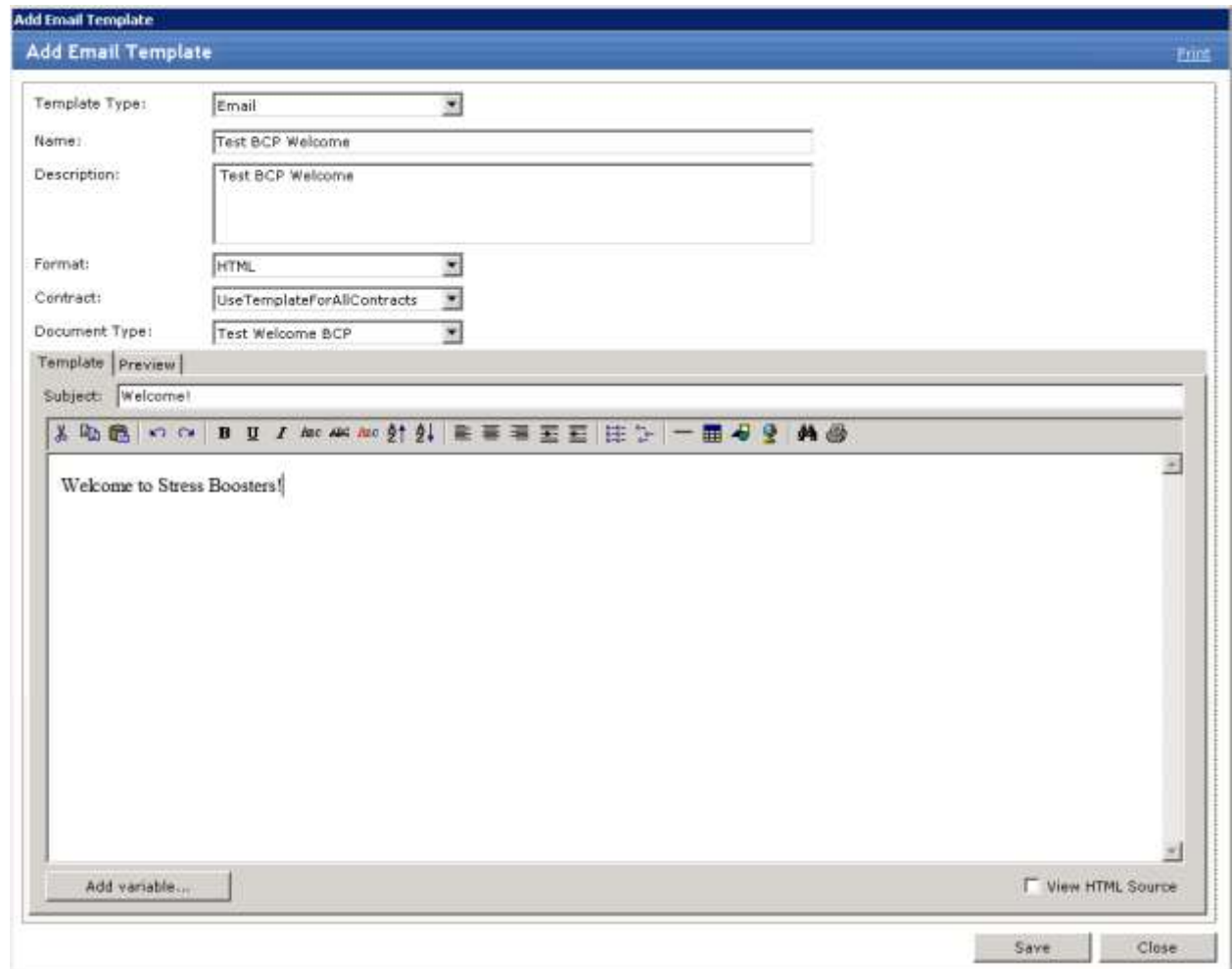


Figure 2 Add Email Template Dialog Box

11. Click **Save**.

3.2.2 Creating an Email Template for Daily BCP Messages

To create an email template for daily messages, use the following procedure:

1. Open the **Email Template Editor** module.
2. Click the **New** button at the bottom of the tab. Embrace displays the **Add Email Template** dialog box.
3. Select **Email** in the **Template Type** field.
4. Enter a name in the **Name** field.
5. Enter a description in the **Description** field.
6. In the **Format** field, select **HTML**.
7. In the **Contract** field, use the drop down list to select the contract for which this email template is defined.
8. In the **Document Type** field, select the document type that you created in section 3.1.2.
9. On the **Template** tab, enter a subject for the daily message in the **Subject** field.

10. Click the **Add Variable...** button to display the popup variables menu shown below:

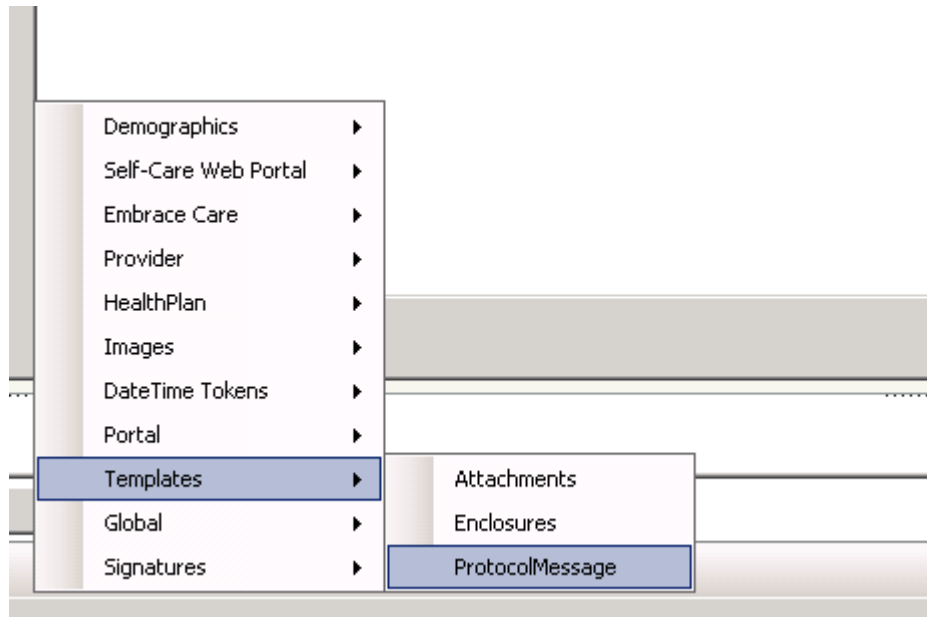


Figure 3 Variables Popup Menu

11. Select the item ProtocolMessage to insert the {ProtocolMessage} variable in the body of the template.
12. Click **Save**.

3.3 Defining the Message Pattern

This section describes how to use Excel and the **Message Pattern Admin** module to specify a message pattern that you can subsequently use in the definition of a BCP. Recall that a *message pattern* consists of the different messages to be sent on different days, beginning on the day **after** a patient is enrolled in a BCP.

3.3.1 Creating a CSV Excel File with BCP Messages

Creating the CSV file that contains the actual text of the different messages to be sent to the patient is the only task that is performed outside of Embrace. You can, in fact, create the CSV file before the document types and email templates are created. You must, however, finish work on the CSV file **BEFORE** you can define the message pattern in Embrace.

To create the CSV file with BCP messages, perform the following procedure:

1. Open Excel and create a new file.
2. In column A, enter the number of days following BCP activation when you want a message to be sent to the patient. You can enter any number from 1 to 366 (inclusive) but a number can be used only once.
3. In column B enter the message.
4. Repeat steps 2 and 3 as necessary to specify the different messages to be sent on different days

following BCP activation. Figure 4 shows how an Excel file might appear after several messages are entered.

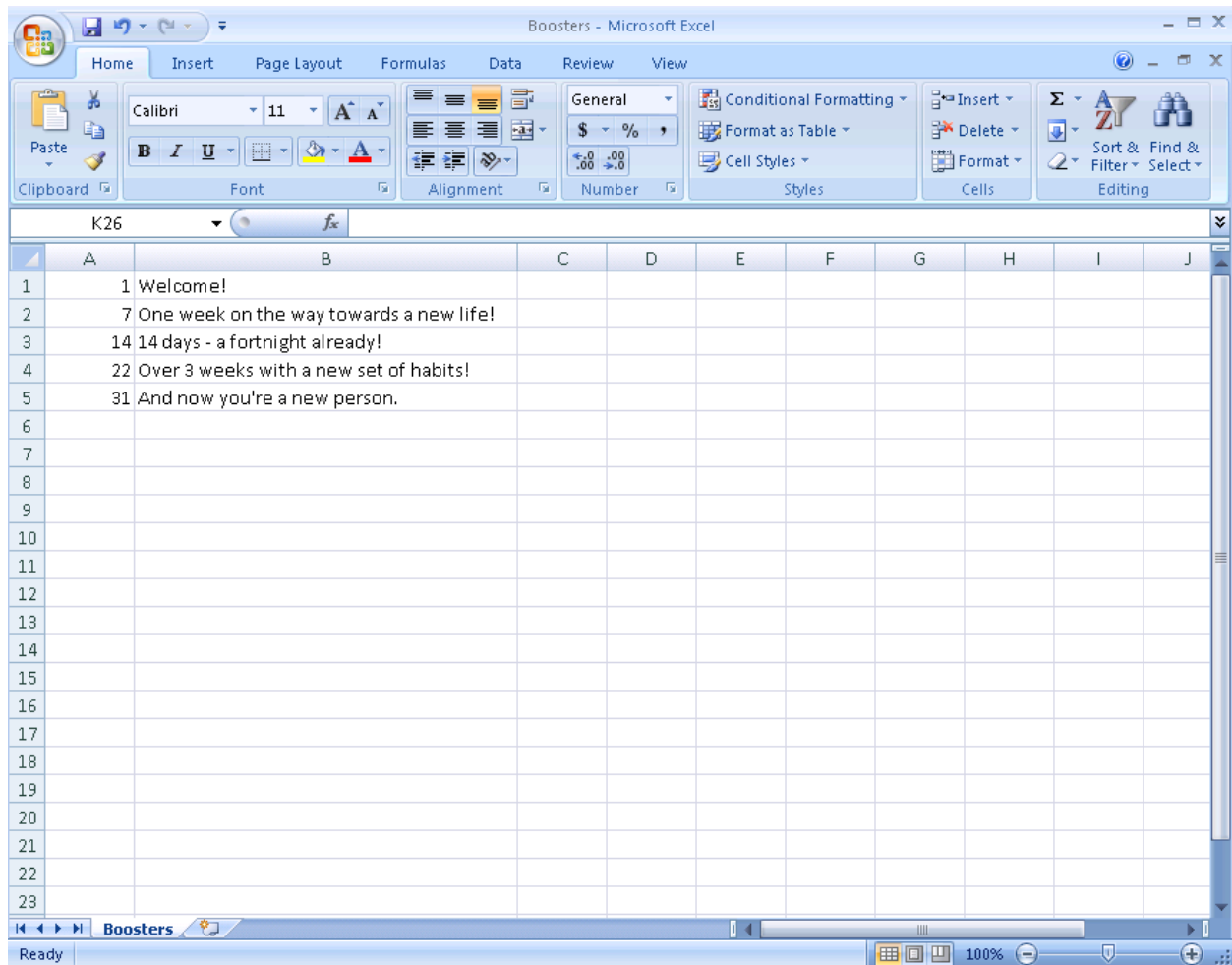


Figure 4 CSV Excel File Containing Messages


5. When you have finished, save the file as a CSV file.

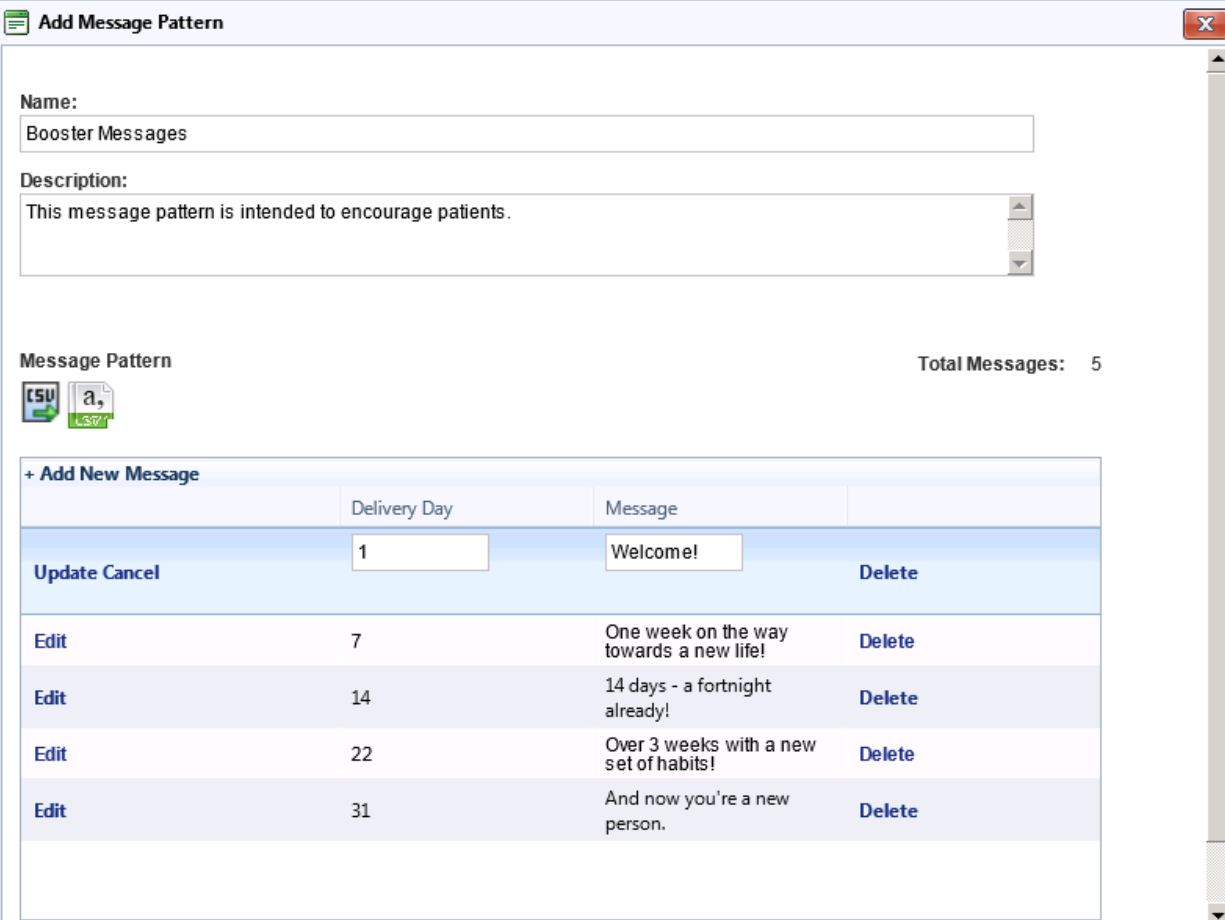
3.3.2 Adding a Message Pattern in Embrace

After you have created a CSV file that contains the messages to be sent, you need to upload this file. This uploading is performed in the context of adding a message pattern to Embrace by means of the **Message Pattern Admin** module.

To add a message pattern to Embrace, use the following procedure:

1. Open the **Message Pattern Admin** module. The system lists the different message patterns that are available in Embrace.
2. Click the **New** button. The **Add Message Pattern** dialog box appears.
3. In the **Name** field, enter a name for the message pattern.
4. In the **Description** field, enter a description of the message pattern.

5. Under the heading **Message Pattern**, click the  icon. The system prompts you to browse to the CSV file containing the message pattern.
6. Select the CSV file created in section 3.3.1. The system prompts you for confirmation. Click **Yes** and the messages are loaded to the **Add Message Pattern** dialog box, as shown in Figure 5.





Add Message Pattern

Name:

Description:

Message Pattern Total Messages: 5

+ Add New Message

	Delivery Day	Message	
Update Cancel	1	Welcome!	Delete
Edit	7	One week on the way towards a new life!	Delete
Edit	14	14 days - a fortnight already!	Delete
Edit	22	Over 3 weeks with a new set of habits!	Delete
Edit	31	And now you're a new person.	Delete

Figure 5 Add Message Pattern Dialog Box

7. If necessary, you can edit or delete an individual message by clicking, respectively, the **Edit** or **Delete** buttons.
8. Click **Save** to save the message pattern.

3.4 Defining the BCP Itself

This section describes how to use **Protocol Admin** module to define the actual Behavior Change Protocol. The Behavior Change Protocol consists of the different elements that you will have already created – the email templates and message pattern. The Protocol Admin module also lets you specify other settings for the BCP.

To define the Behavior Change Protocol, use the following procedure:

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1. Open the **Protocol Admin** module. The system lists the different protocols that are available in Embrace. Inactive protocols will be listed in *italics*.
 2. Click the **New** button. The **Add Behaviour Change Protocol** dialog box appears.
 3. In the **Name** field, enter a name for the Behavior Change Protocol.
 4. In the **Member-facing name** field, enter a name that will appear to patients who will receive these messages.
 5. In the **Description** field, enter a description of the Behavior Change Protocol. The text that you enter here appears in WBC.
 6. In the **Protocol Type** field, select Behavior Change. (**NOTE:** In 6.5, Behavior Change is the only possible item to select.)
 7. In the **OU Name** field, use the drop down list to select the organizational unit for which the BCP is defined.
 8. In the **Status** field, specify the status of the BCP by clicking the appropriate radio button. The status of **Fully Active** specifies that the BCP is active and that new patients can be enrolled. The status **Operational but no new enrollments** specifies that the BCP is active for current patients but that additional patients **cannot** be enrolled. The status **Inactive: Any enrollments terminated** specifies that the BCP is completely inactive.
 9. In the **Focus Area** field, use the drop down list to specify the focus area of the BCP.
 10. In the **Email Templates** block, use the drop down lists to select the email templates for the **Confirmation** and **Daily Message**.
 11. In the **Message Pattern** field, use the drop down list to select the message pattern of the BCP. The message patterns that appear in the drop down list are those that have been created in the **Message Pattern Admin** module. After you select a message pattern, the system lists the messages at the bottom of the **Add Behaviour Change Protocol** dialog box, as shown in Figure 6.

Figure 6 Add Behaviour Change Protocol Dialog Box

Beginning the day after the patient is enrolled, protocol messages may be sent.

This section describes how to use the **Population Manager** module to define a care object that will send the messages associated with a BCP to the appropriate patients. It discusses establishing selection criteria for the transmission of protocol messages.

To define a care object that will send BCP messages, use the following procedure:

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3. Enter a name in the **Name** field.
 4. Enter a description in the **Description** field.
 5. Click **Edit** on the **Criteria** tab and the system displays the **Edit Expression** dialog box.
 6. Specify the selection expression **1=1**.
 7. Click the **Effects** tab and click the **New...** button. In the popup menu that appears, select **Send Protocol Message**.
 8. Click the **Schedule** tab and set the dates and time when you want the care object to run.
 9. Click **Save**.

4 Enrolling a Patient in a BCP

This section describes how a patient can enroll in a BCP through WBC. It also describes how a nurse can enroll a patient in a BCP by means of the **Protocols** module.

4.1 How a Patient Enrolls in a BCP in WBC

A patient can enroll in a BCP by performing the following procedure:


1. Login to WBC.
2. Click **My Well-Being Plan** tab. If BCPs are enabled, a patient will see the **See All Well-Being Boosters** link. If there are BCPs enabled for the patient's focus areas, the string **Want a well-being boost?** will appear in these focus areas. Clicking either will display the **Well-Being Boosters** page.
3. Click on the **I'll try it!** link to enroll in a BCP. WBC prompts you to indicate your preferred way of receiving the booster.
4. To stop receiving boosters, click **Unregister** on the **Well-Being Boosters** page.

4.2 Enrolling a Patient in a BCP with Embrace

A nurse can enroll a patient in a BCP by opening the **Protocols** module. On the **Protocols** tab, the nurse can enroll a patient in a BCP or unregister the patient from a BCP.

4.3 Protocol Messages and the Patient Record

In the **Encounters** module, each protocol message that a patient receives will be listed and identified as such.

In addition, each protocol message that a patient receives will appear in the timeline at the bottom of the Worksheet as an icon . (Other kinds of messages may be indicated by this icon as well.) By mousing over the icon, you can display information that describes the message. In the case of a protocol message, text that identifies the message as a protocol message appears.

5 How Patients Receive Messages

By default, the patient will receive daily messages through SMS or email depending on the patient's communication preferences. **The initial Welcome/Confirmation message is sent only by email.** This

means that if a patient's communication preferences are set to SMS only, he or she will not receive the initial Welcome/Confirmation message.

Note that patients can set their communication preferences through WBC. On the Well-Being Boosters page, patients can access Communication Preferences. There they can select to receive **Protocol** messages through SMS or email or both.