

care.coach

PACE Staff Training Guide

Quick Reference for All Roles

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1. What is care.coach?

care.coach is a tablet-based digital health service that places an animated avatar companion in the homes of older adults. The avatar is powered by trained **Health Advocates** who provide real human connection through two-way voice communication.

Health Advocates	Trained professionals behind every avatar providing companionship, coaching, and clinical support
Proactive Check-Ins	Advocates wake the avatar on schedule to engage participants throughout the day
Audio and Visual	Two-way voice communication with an animated on-screen companion
Protocol-Driven Care	Advocates follow clinically validated protocols and escalate concerns to your care team
Builds Trust Over Time	The relationship deepens, leading to more effective coaching and engagement
Available in EN and ES	Full service available in English and Spanish

2. Video Visits

Seamless virtual connections through the participant's tablet. Connect with participants or conduct group sessions directly through the care.coach platform.

Feature	Details
Same-Day Appointments	Connect with a single click
Auto Answer	Device answers automatically, no participant action needed
Group Calls	Up to 19 participants per session
Family and Friends	Add caregivers and loved ones to calls

Common Use Cases: Triage, Care Plans, PT/OT, Training, Book Club, Bingo, Family Calls, Town Halls

3. Participant Engagement Features

Category	What's Included
Games	Bingo, Jeopardy, Scrabble, choose your own adventure
Photos	Family photos, friends, or online image browsing
Meditation	Guided meditation, daily prayer, psalms
News and Weather	Daily news, weather updates, local events
Conversation	Talk about the day, jokes, fun facts
Reminders	Medication, appointments, daily routines
Health and Wellness	Workout routines, diet support, health coaching
Audiobooks	Poetry, nonfiction, fantasy, and more genres

Music	Folk, pop, country, rock, jazz, and more
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4. Privacy and Security

Who's Behind the Avatar?

Trained Health Advocates provide companionship, coaching, and support. Each interaction is tailored to the participant's care plan. Advocates do not see or hear the participant unless the avatar is awake.

When is the Avatar Active?

The avatar only wakes during scheduled check-ins, reminders, or when 'pet' by the participant. There is no wake phrase. Between check-ins, the avatar remains asleep.

Customizing Privacy Settings

During privacy periods, the avatar will not wake or interact. Participants and staff can request frequency changes or set privacy periods. Set privacy by telling the avatar, using the privacy clock, or contacting support.

5. Clinical Value and Outcomes

Evidence-based outcomes across three levels of integration:

Level	Metric	Result	Source
1: Engagement	Loneliness	3x less loneliness	Controlled study; UCLA Loneliness Scale (p<0.01)
1: Engagement	Daily Conversation	23 min average daily	Observed average across active participants
2: Chronic Condition	Falls	50% reduction	Controlled study of 90 participants
2: Chronic Condition	Depression	25% reduction	Measured by PHQ-9 across active participants
3: Integrated IDT	ER Visits	79% reduction	Controlled study of 90 participants
3: Integrated IDT	Home Visits	3.2 fewer pmpm	Observed reduction via self-care and monitoring

6. How Reminders Work

Reminders follow a three-step process from setup to verification:

Step	What Happens	Example
1. Set-Up	Staff requests a reminder via email to support@care.coach with participant ID and details.	Tuesday 8:00 AM Transportation and Medication Reminder
2. Delivered	The avatar delivers the reminder at the scheduled time and asks for confirmation.	"Will you be ready for your 8:00 AM transportation?" / "Did you remember to take your medications?"
3. Verified	The avatar confirms the response and logs the result.	"Good job staying on top of your medication!"

7. Clinical Protocols and Coaching Programs

care.coach uses clinically validated CORE protocols. During check-ins, the avatar asks protocol-specific health questions. Responses are evaluated against clinical thresholds, and urgent issues are escalated by phone while non-urgent ones go by email.

Available Coaching Programs: Heart Failure, Diabetes, Falls Risk, Depression, Hypertension, COPD, Sobriety Support, Hydration, Pneumonia

Example: COPD Health Coaching Conversation

Avatar: Hey Steve, would now be a good time for me to ask you a few questions?

Steve: Sure, Bud. I am all ears.

Avatar: How did you sleep last night? Did symptoms related to your breathing condition keep you up?

Steve: Nothing more than usual, it's always a little difficult.

Avatar: Pursed lip breathing can help get the air you need without working so hard. Would you like to do a breathing exercise now?

Steve: That sounds good! Let's do it.

Avatar: Ok, great! I'll bring that exercise up for you right now.

8. Understanding Escalations

Health Advocates route participant concerns to your care team across three tiers:

URGENT - Phone Escalation	MEDIUM - Email Escalation	LOW - Power BI Dashboard
Immediate safety concerns Shortness of breath + swelling Fall with injury or pain Followed by email summary	Non-urgent condition changes Wants to discuss symptoms Increasing fatigue or nausea	Positive interactions + trends Consistent med adherence Completing daily check-ins

9. Portal Login

URL: portal.care.coach

Step 1: Go to **portal.care.coach** in your browser

Step 2: Select 'Sign in with Microsoft' (automatic) or 'Sign in with Email' (enter your address)

Step 3: If using email, select 'Send Verified login link' and check your inbox for an email from Video Visit Notifications

Step 4: Open the email and click 'Click Here' to access the portal. Each link is single-use.

Tip: Check your Spam folder if you don't see the email. Login links can only be used once.

Portal Features: Updates and Resources, Video Visits, Enrollment Form, Power BI Dashboard

10. Video Visits: Getting Connected

URL: video.care.coach

Step 1: Go to **video.care.coach**

Step 2: Use credentials from the email sent by Support with subject 'care.coach Video Visit Login'

Step 3: Choose your organization from the dropdown menu

Step 4: Select 'Devices' to see participants or 'Users' to see staff. Click INVITE to start a call.

Tip: Check your Spam folder if you don't see the credentials email from Support.

11. Enrollment and Device Setup

Identifying Participants

Participants are ranked by risk score in IntusCare, then cross-referenced with the frequent readmissions list. Participants on both lists are the highest priority. The Tech Team (or care.coach Customer Success with care.coach+) runs this process and shares the prioritized list with Center Operations. Center Operations validates device availability before enrollment proceeds.

Setting Up a Participant (3 Steps)

Step	Action	Details
1. Confirm	Confirm Enrollment	Review candidate list, confirm device availability, assign device, notify care.coach and Tech Team
2. Power On	Power On Device	Plug in the device. It should automatically power on after a few moments. If it does not, press and hold the power button (check navigation sticker on the back). Ensure cord is not a tripping hazard.

3. Activate	Place and Activate	Once the avatar appears, tap the screen. The avatar will ask the participant a few questions to finalize setup.
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12. Adding Interventions and Disenrollment

Adding Interventions

Option 1 - Email: Send an email to **support@care.coach** including the device number, participant initials, and your request (coaching, reminders, media, etc.).

Option 2 - Phone (Urgent): Call **1.855.437.4569 ext 1** (available 24/7 for urgent requests).

Tip: The 24/7 Support Team or the avatar itself can make personalization adjustments on request.

Disenrollment

Option 1 - Email: Email **support@care.coach** and specify which device to disenroll.

Option 2 - Via the Avatar: Tap the avatar, say you'd like to disenroll, and provide the disenrollment code. **Your code is the current year.**

13. Troubleshooting and Device Support

Issue	What to Do
General Troubleshooting	Call Support at 1.855.437.4569 ext 1 . Provide device number and describe the issue. Support will walk you through steps.
Low Signal	care.coach can connect the device to Wi-Fi if available, or swap for a device with a different carrier.
Damaged Device	Replace with an on-hand device if available. Notify support of the swap so they can transfer the profile.
Swapping Devices	Contact support. Provide: device ID being replaced, new device ID, scheduled swap date. Support transfers the profile.
Returning Devices	Request a shipping label and/or materials from support. Return the device using provided materials.

Reminder: A real person responds through the avatar. Responses take longer than a typical digital conversation. This is normal!

You can also request charging cables and adapters through the support team.

Role-Specific Quick Reference

The following pages contain instructions tailored to each discipline.
Find your role and use it as your go-to reference.

14. Center Operations

CENTER DIRECTORS | OPERATIONS STAFF | SITE LEADS

Responsibility	What You Do
Device Lifecycle	Track every device as Available, Pending, or Unusable. Devices never sit idle without a status.
Enrollment Coordination	Review candidate lists from Tech Team, match to available devices, confirm enrollment each cycle.
Participant Introductions	You conduct all standard introductions. Present the device, explain the service, ensure comfort.
Disenrollment	Staff-initiated only. Email support@care.coach or enter code (current year) via the avatar. Retrieve and sanitize.
Device Offline Response	Power devices back on when notified by care.coach. Monitor status anytime via the portal.
Appointment Reminders	Manage reminders by emailing support@care.coach with participant ID and the change.

Device Lifecycle Statuses

Status	Definition	Next Action
Available	Sanitized, reset, ready for deployment	Match to enrollment candidate
Pending	Awaiting sanitization, reset, or accessories	Prepare and move to Available
Unusable	Damaged, lost, or needs replacement	Contact support for swap/return

The Cycle: Intake (receive, assign status) > Prepare (sanitize, reset, confirm) > Track (available list = enrollment capacity) > Deploy (match + introduce) > Recover (retrieve, sanitize, return to Available)

Devices and supplies can be ordered directly through the care.coach portal.

15. Tech Team

PACE TECH TEAM | WITH CARE.COACH+: CARE.COACH CS

Your role: Use IntusCare to identify and prioritize enrollment candidates.

Step	Action	Details
1	Check Capacity	Center Ops tells you how many devices are available.
2	Open IntusCare	Log in and confirm list is sorted by risk score (highest first).
3	Filter by Site	Apply site filters to match center-level enrollment capacity.
4	Prioritize	Review in descending risk order. Cross-reference with frequent admissions.
5	Submit List	Share with Center Ops and support@care.coach. Include: name, phone, address, DOB, site, language.

IntusCare is the source of truth for risk prioritization. Device availability is always validated by Center Ops.

16. Provider Team

MEDICAL DIRECTOR | RN | MEDICAL ASSISTANT

Your role: Respond to urgent escalations and manage coaching programs. First available responds.

When You Receive a Phone Escalation

Step	Action	Details
1	Receive Call	care.coach provides context at time of call.
2	Acknowledge and Triage	Determine urgency: phone or video visit.
3	Set Expectation	Give a time window and channel. care.coach relays to participant.
4	Follow Up	Join video visit or phone follow-up. Address the concern.
5	Close Loop	Communicate follow-up items to care.coach. Document.

Care Planning: care.coach recommends coaching programs based on IntusCare data. You approve, modify, or decline before activation. To adjust programs anytime, email support@care.coach.

17. Nursing

NURSING LEADERSHIP | DESIGNATED NURSING STAFF

Your role: Respond to email escalations and manage medication reminders.

When You Receive an Email Escalation

Step	Action	Details
1	Receive Email	Escalation details sent to nursing inbox.
2	Review and Assess	Determine action. If urgent, escalate to Provider Team.
3	Take Action	Contact participant. Coordinate with Providers. Update EMR.
4	Communicate Back	Tell care.coach: closed or ongoing monitoring.
5	Document	Record per nursing documentation standards.

Medication Reminders: You own medication reminders in care.coach, coordinated with EMR updates. To add or remove, email support@care.coach with participant ID and the change. Urgent escalations go to the Provider Team by phone.

18. Care Planning: How It All Connects

At Enrollment (care.coach Initiated)

care.coach reviews IntusCare data, recommends a coaching program, and submits to the Provider Team for approval. Nothing is activated until approved. If no response in 2 weeks, care.coach escalates to the PACE CMO.

Ongoing (PACE Team Owned)

Discipline	Owns	Cadence
Nursing	Medication reminders	Coordinate with EMR
Center Ops	Appointment reminders	At care planning meetings or as needed
Provider Team	Coaching programs	Clinically indicated changes
All Disciplines	Video Visits	PHQ-9, fall prevention, nutrition, therapy, etc.

All changes: email support@care.coach with participant ID and your request. Primary cadence: routine PACE care planning meetings.

19. What care.coach Handles

So your team knows what we own and when to expect outreach from us:

Service	Details
Device Fulfillment	Ships devices and supplies when ordered through the portal
Onsite Launch Events	On request; includes introductions, staff training, inventory review
Enrollment Care Planning	Reviews IntusCare data, recommends coaching programs, submits to Provider Team
1-Week Follow-Up	Calls participant 7 days post-enrollment to assess adjustment
Device Offline Response	Sound alert, phone, text (up to 3 attempts), then notifies Center Ops
Low Engagement Outreach	3+ days no interaction: phone/video up to 3 attempts, then contacts PACE
Clinical Escalations	Urgent: phone to Provider Team Non-urgent: email to Nursing
NPS Surveys	Every 6 months; results on Power BI dashboard
Disenrollment Processing	Removes participant from portal and PBI upon staff request
Reporting and Meetings	Power BI, monthly ops meetings, QBRs. Scheduled by care.coach.

care.coach does not make clinical decisions. We serve as the coordination and communication bridge between participants and your clinical team.

20. Contact and Support

Support Team (24/7)

Technical difficulties

Changes to an account

Video Visit access

Power BI troubleshooting

Immediate participant assistance

Email: support@care.coach

Phone: 1.855.437.4569 ext 1

Eric Warden, VP of Operations and Customer Success

Staff training

Monthly meetings

Customer satisfaction

Business Reviews

Project discussions

Email: ericw@care.coach

Phone: 1.856.448.3537