INSIGHTS USER GUIDE

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Introduction

Thank you for choosing Holon! We are excited to welcome you to the Holon Community. We've put together the Insights User Guide to help you get started in the Holon app.

While this User Guide may be used as a general reference for features and functionalities available in the application, the Holon app is designed to offer admins and users a level of personalization. Admins may create custom workflows to meet the different needs of their organization and personalize them based on user roles and/or business rules. With that said, visuals and labels may differ, depending on which features are enabled and how configurations are set up for your organization.

We've included helpful icons throughout this User Guide to call out special features and configurations.

This icon indicates a feature, category, or label that may differ depending on how your administrator has configured the system.

This icon calls out helpful hints and may note timing on upcoming feature releases.

If you see features in the User Guide that are not available in your app and would like to request them, please contact your administrator. For all other support (outages, feature issues, etc.), please contact Holon directly.

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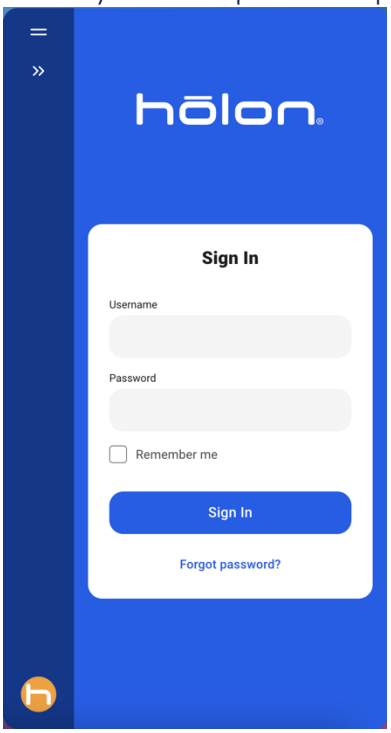
Install the Holon App

1. Download the latest Holon app from Holonsolutions.com/downloads/release.
2. Follow the instructions on the download wizard to install the application on your computer.
3. Once the installation process is complete, the Holon icon will appear on your desktop.

4. Launch the Holon app by clicking on the Holon icon located on your desktop or Start Menu.

Login

1. When you first open the application, the **Sign In** screen appears.



2. Enter the username and temporary password provided by your administrator to log in to the Holon app for the first time.

Note: You must change your password once you've logged in.

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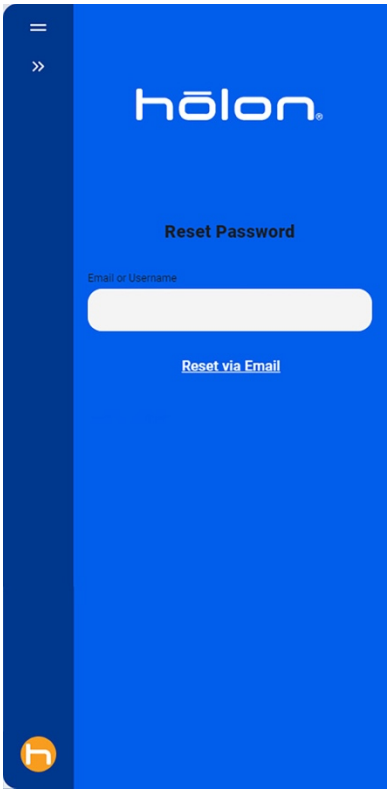
3. Select the **Remember me** checkbox if you would like the system to remember your username the next time you open the app.
4. Click the **Sign In** button to continue.

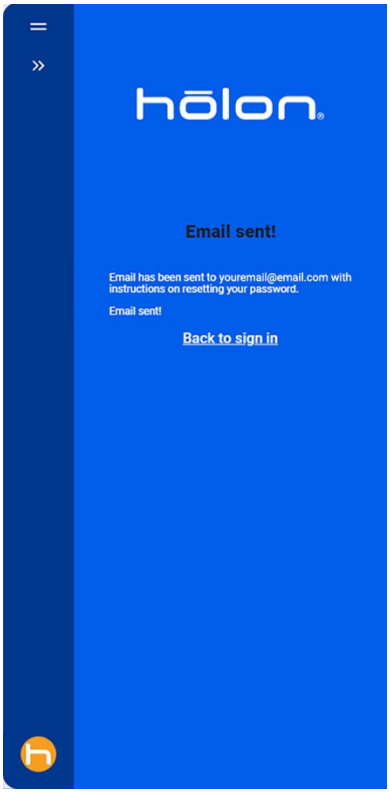
   If you do not remember your password, you can click on the **Forgot password?** link. This will bring up the **Reset Password** screen.

   Enter your email address, then click on the **Reset via Email** link. A password reset link will be sent to your email.

   Reset your password, then click on the **Back to sign in** link to return to the sign in page.

   If you still have issues logging in, please contact your administrator.





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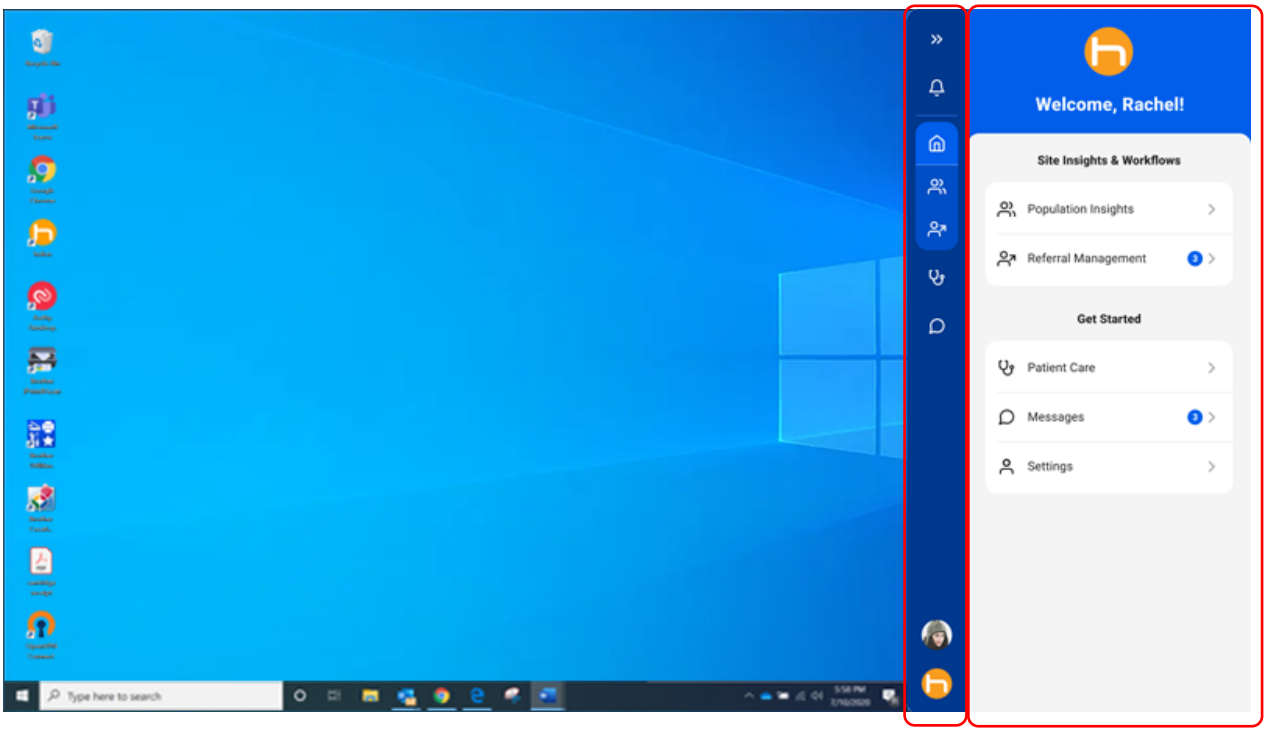
Overview

The Holon App

The navigation is the slim window, outlined in red, where the application displays on the screen.

There are two parts of the app:

1. The Navigation Tab
2. The Content Window



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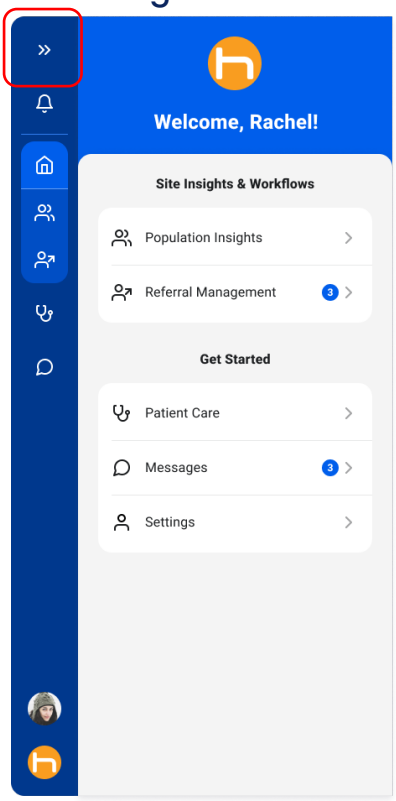
The Navigation Tab



The content window may be collapsed when not in use. Click on the **Minimize** icon » in the navigation tab to minimize the window.

Moving & Resizing the Navigation Tab

The navigation tab can be resized and moved around on your desktop.

In the minimized view, you will only be able to see the Move, Expand, Mute, Home, Patient Care, Messaging, Profile, and Menu icons.

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Click and drag the **Move** icon = to reposition the tab to the preferred location on your desktop.

You can also mute notifications by selecting the **Mute** icon in the navigation tab.

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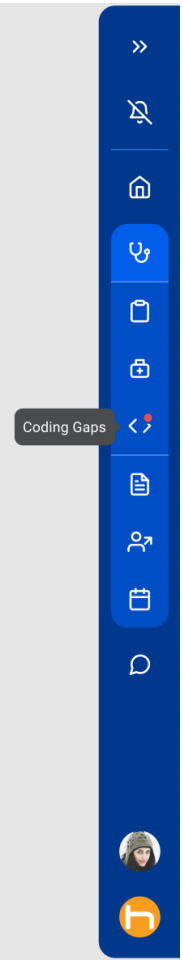
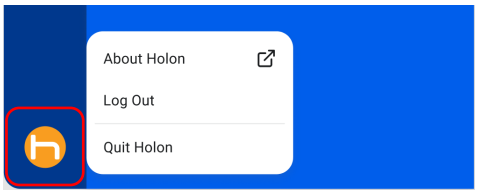
In the expanded view, you will be able to see notifications that need your attention.

Note: If you hover your mouse over an icon, you will see a tool tip showing you the name of that button.



Quit Application

To quit the application, click on the **Menu** icon at the bottom of the navigation tab, then select Quit.



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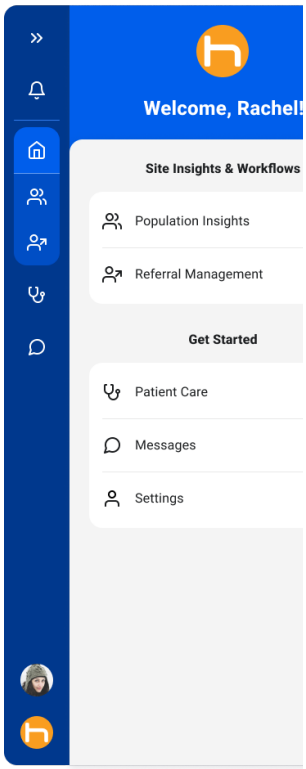
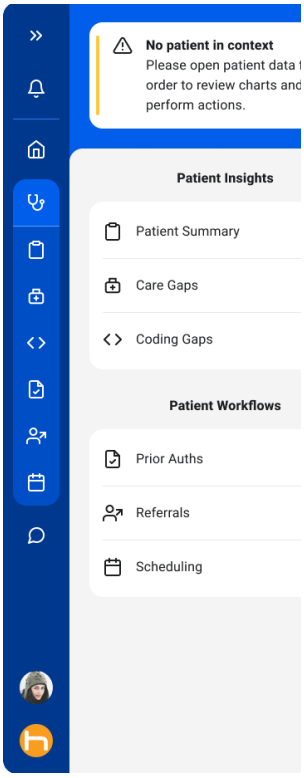
The Content Window

The content window is the area of the screen where the homepage and application information are displayed when the window is not minimized. The following are examples of content that can be displayed in the content window:

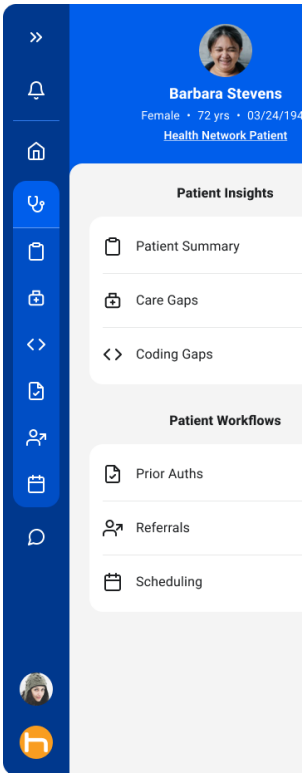
Home Screen



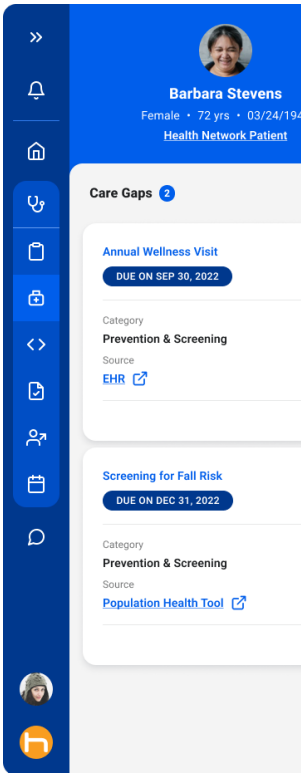
No patient in context



Patient Care Screen



Care Gaps with Patient-in-Context



Note: The option to pull patient images from your EHR into the header will be available in late 2022.

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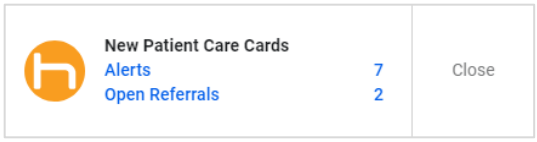
Notifications

While working in your EHR, you may receive desktop notifications with patient care information.

You can click on the category page or number to open up details in the content window. You can also click the “Close” button to dismiss it.

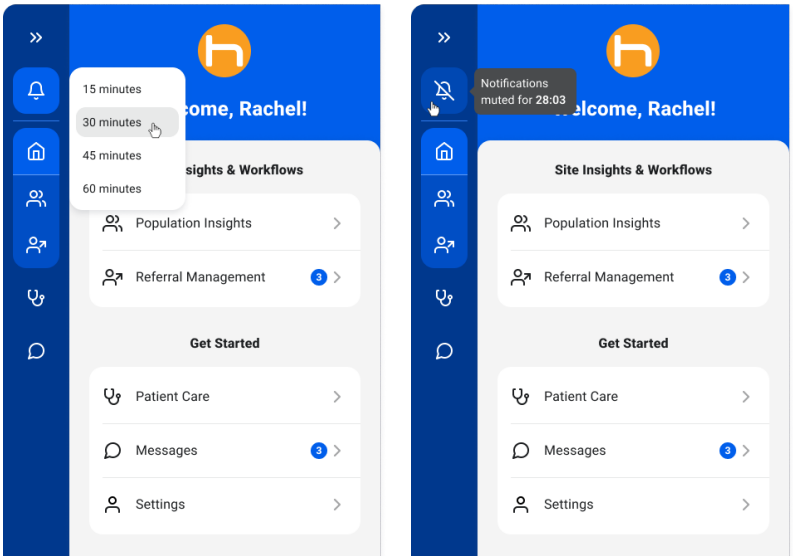


Note: This is an example of categories available. Your administrator may configure different categories for your organization.

Muting Notifications

When the application is expanded, you can select from the available options to mute your notifications.

Click on the Mute icon in the Navigation Tab, then select one of the Mute durations.



This icon indicates that notifications have been muted.

Note: If you hover your mouse over the Muted icon, it will show you the remaining time notifications will be muted.

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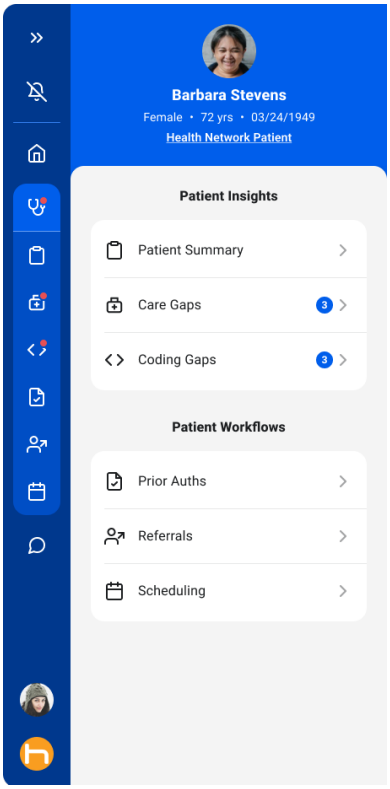
While desktop notifications are muted, you may see a red dot appear next to the icons in the navigation tab. This lets you know that there are care opportunities that need your attention.



When a patient is in context, the number in the circle (Ex: 2) indicates how many of each of those care opportunities are available for that specific patient.

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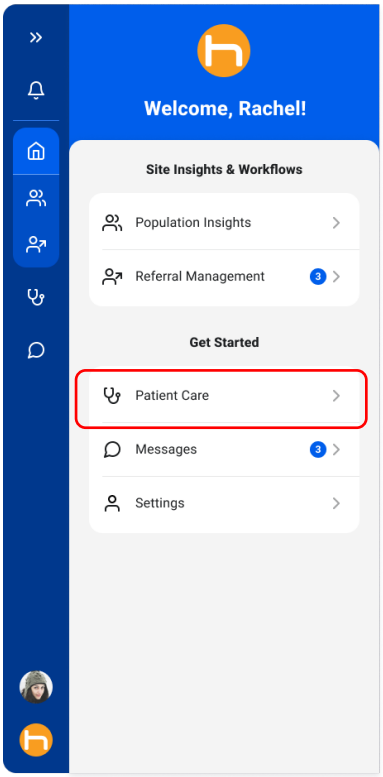
Features

Home Screen

The Home Screen is where you will land once you sign in. The following is an example of the Home Page.

Note: The options here will depend on what your sponsor has configured and enabled for your organization.

Note: Referrals and Messaging will be available late 2022.



From the Home Screen, you will be able to access Patient Care information.

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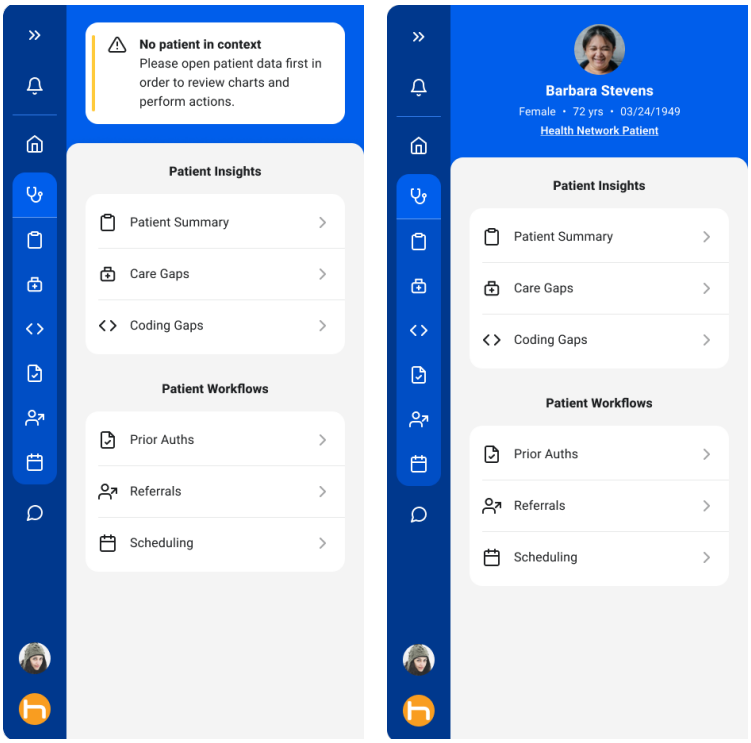
The Content Header

When a patient is in context, the content header will show patient information.



Content

When you click on **Patient Care** from the Home Screen, you'll be able to see and select from the available categories, such as Care Gaps, Coding Gaps, Prior Authorizations, Referrals, Scheduling, etc.

Note: The options here will depend on what your sponsor has enabled for your organization.

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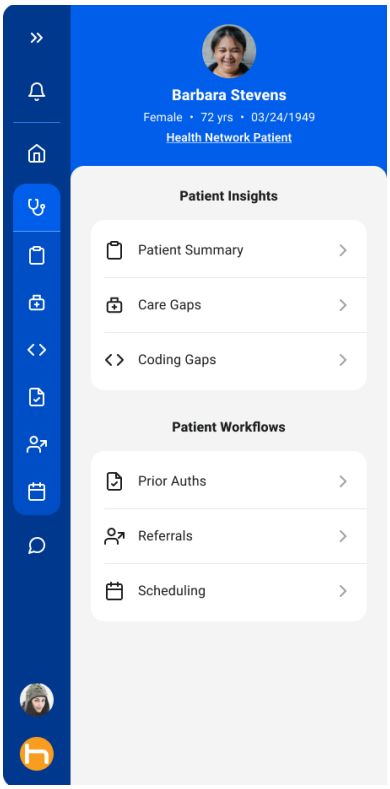
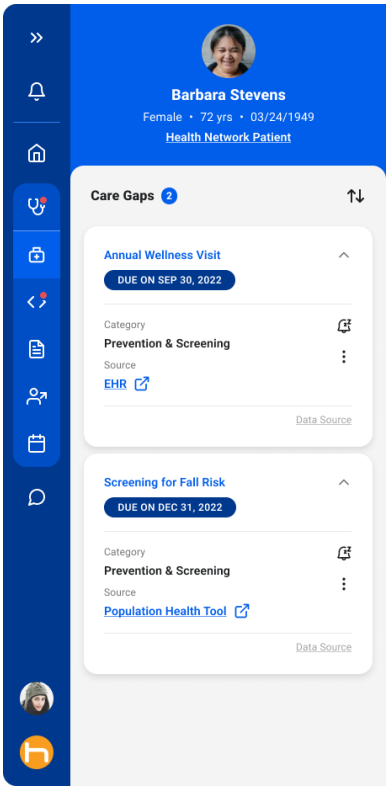


You can then view the care opportunities for the selected patient.



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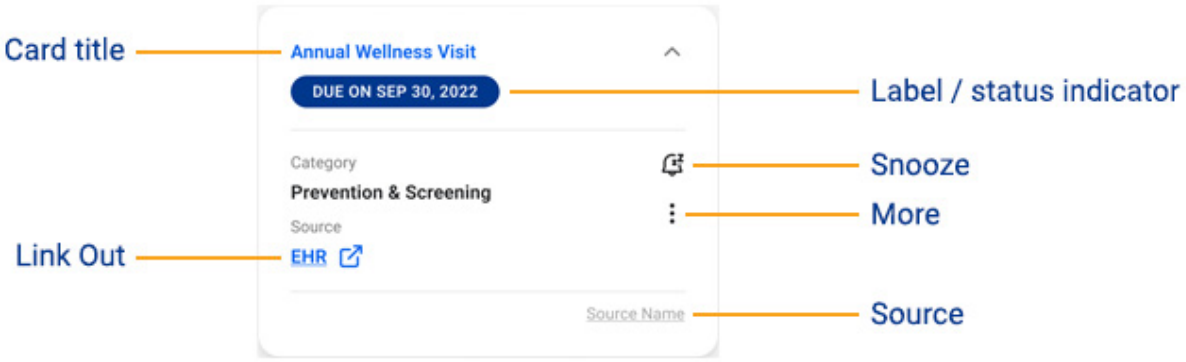
Content Cards

At the card level, you can interact with the specific content cards. You also have the ability to sort the cards.

Card Level Icons



Note: This is an example of a content card. Your administrator may configure content cards differently for your organization.

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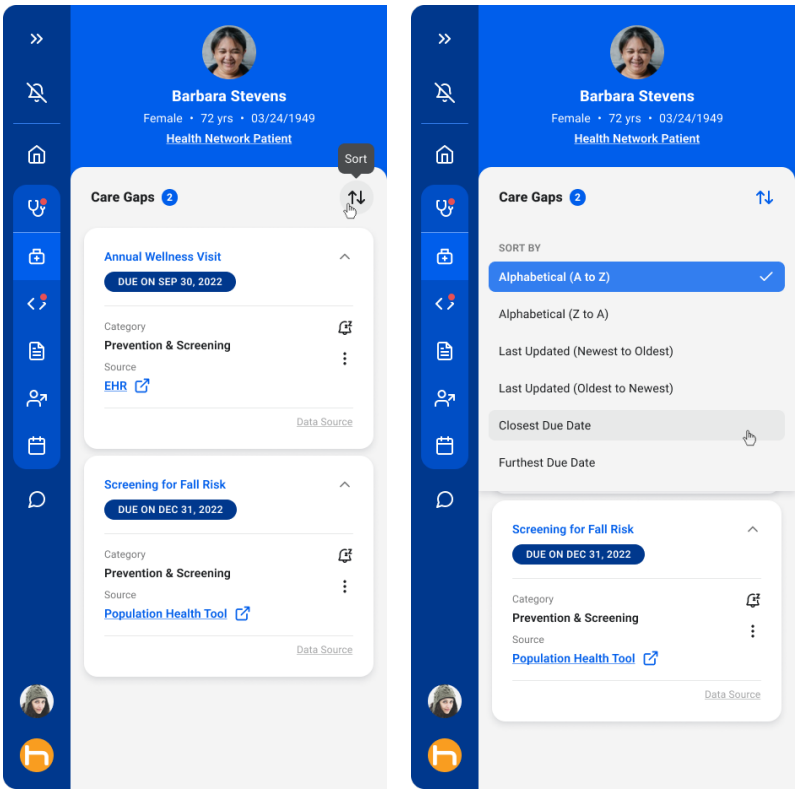
Sort

You can also sort the cards to help you more easily find the information/gap card you're looking for.

Click on the **Sort** icon ↑↓, then select from one of the sort options.

Note: This is customizable feature. Your administrator may configure content sorting differently for your organization.

Most commonly, cards may be sorted alphabetically, last updated, or by due date.



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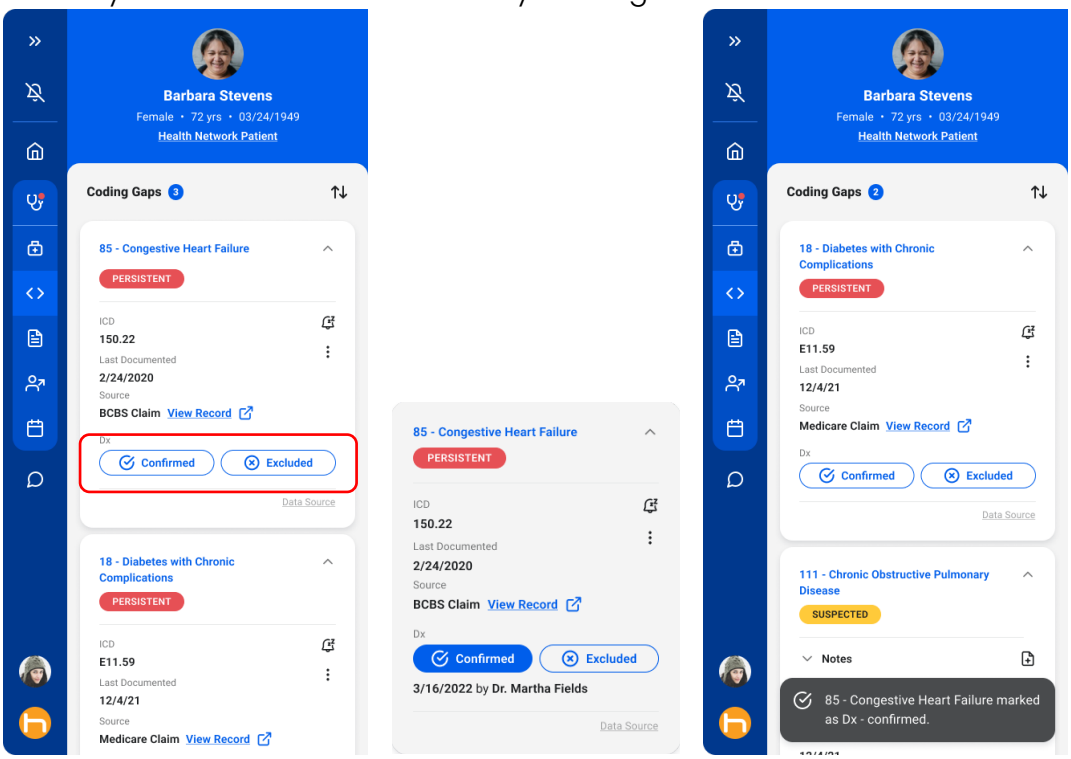
Interactions

Note: If your sponsor has made it available, you may also be able to interact with it to update the data source.

You may interact with the content by clicking on the Action Buttons.



Once you take an action, you will receive a confirmation for the action taken.

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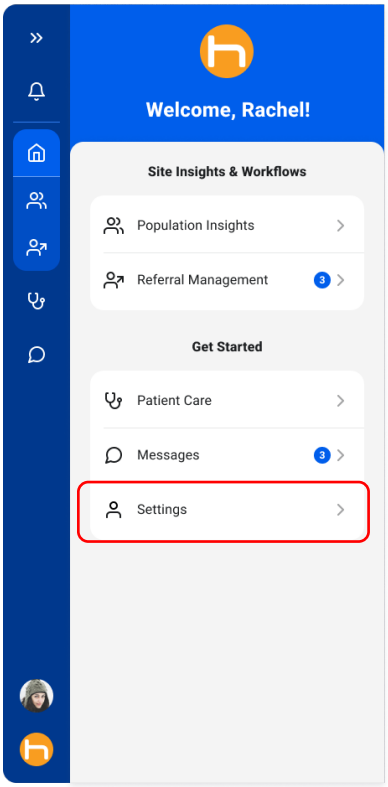
Settings

Once you're signed in, you will see the **Welcome Screen**.

You can manage your user account and settings by clicking on the **Settings** option.



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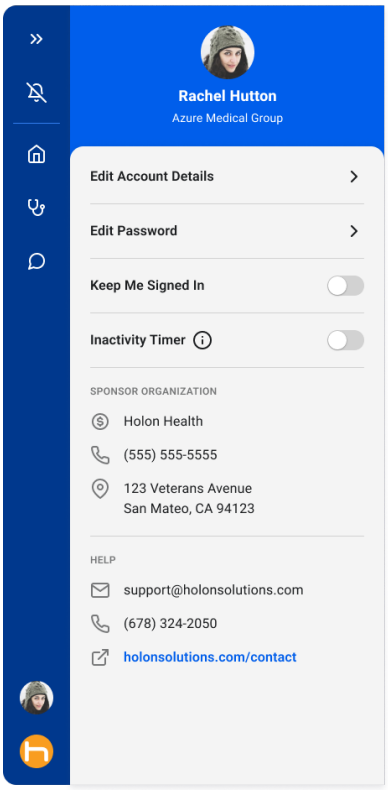
Account Settings & Security

From **Settings**, you'll be able to update your user profile, change your password, turn on/off the Keep Me Sign In option and Inactivity Timer. You'll also be able to access Help and contact information for your sponsor organization.



Edit User Profile and Account Details

If this is your first time using the application or have incomplete profile details, it is recommended that you update your profile.

Click on the **Edit Account Details** option.

Enter your account details.

Note: The required fields are First Name, Last Name, and Email. All other fields and information are optional.

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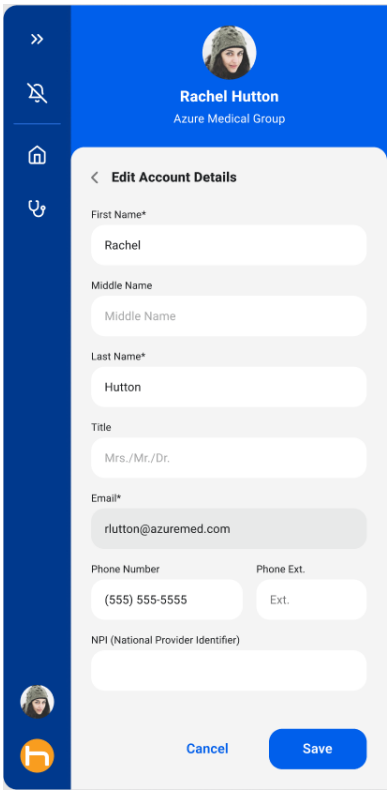
Click **Save** to save your edits.



You can revisit and access your user profile and other settings at any time by clicking on the **Settings**, then **Edit Account Details** option from the Welcome Screen.

Changing Your Password

To change your password, click on the **Edit Password** option in the Settings screen.

This will bring you to the **Edit Password** page, where you'll be able to input a new password. Click **Submit** to confirm the changes.

Note: Please contact your administrator for help changing your password if you're using your organization's Active Directory for login.

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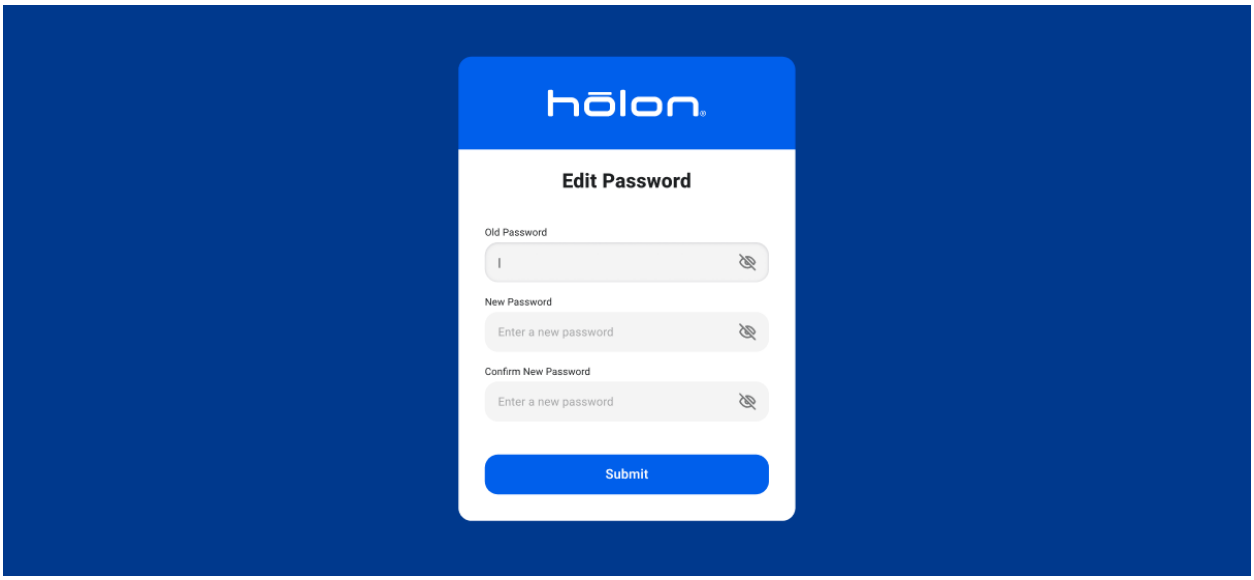

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Introduction to Workflows

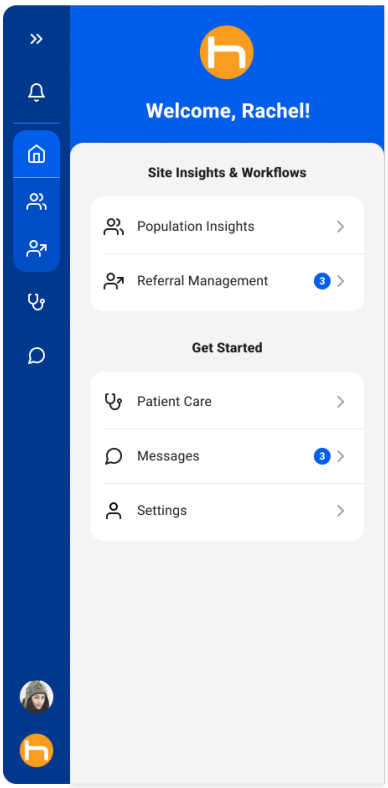
Our workflow senses when a patient's chart is opened and where the user is within the medical record, allowing the application to surface relevant, actionable information.

Welcome Screen

On the Welcome Screen, you will be able to choose from a menu of options for what you want to do.

Note: The options here will depend on what your sponsor has enabled for your practice.

Note: Referrals and Messaging will be available late 2022.



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Patient Insights

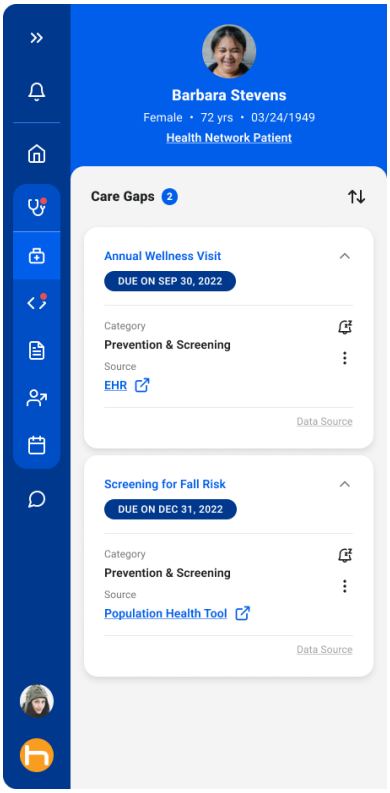
Note: Care Gaps, Coding Gaps, and Patient Summary are examples of categories available. The Patient Insights categories may differ depending on what your sponsor has enabled or customized for your practice.

Care Gaps

Introduction

Actionable information ranging from quality measures through utilization, care management insights, and other care needs specific to the patient are organized to help the user focus on the highest priority opportunities.

While patient is in context, you can view Care Gaps pertaining to that specific patient.



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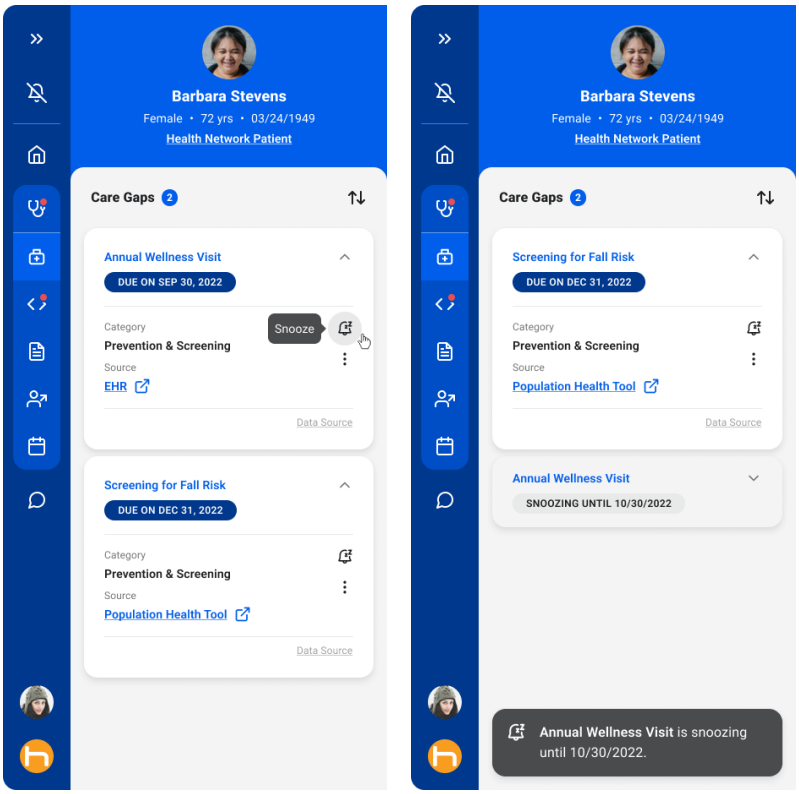
Snoozing Care Gaps

You may want to snooze a care gap if it is not appropriate to address at this time or if the gap has been closed but the data source has not yet updated.

Note: You will see the snooze icon if this feature is enabled for your organization.

To snooze a care gap with the default duration, click on the **Snooze** icon in the gap card.



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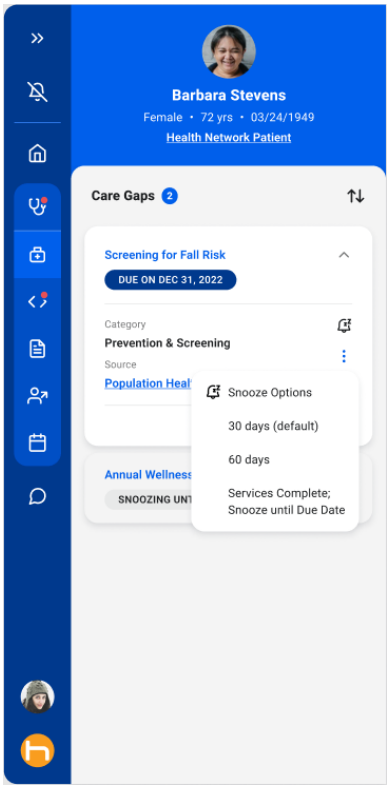
Alternatively, you may choose from other Snooze options in the More menu. The snooze durations provided here are determined by your admin.



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Coding Gaps

Introduction

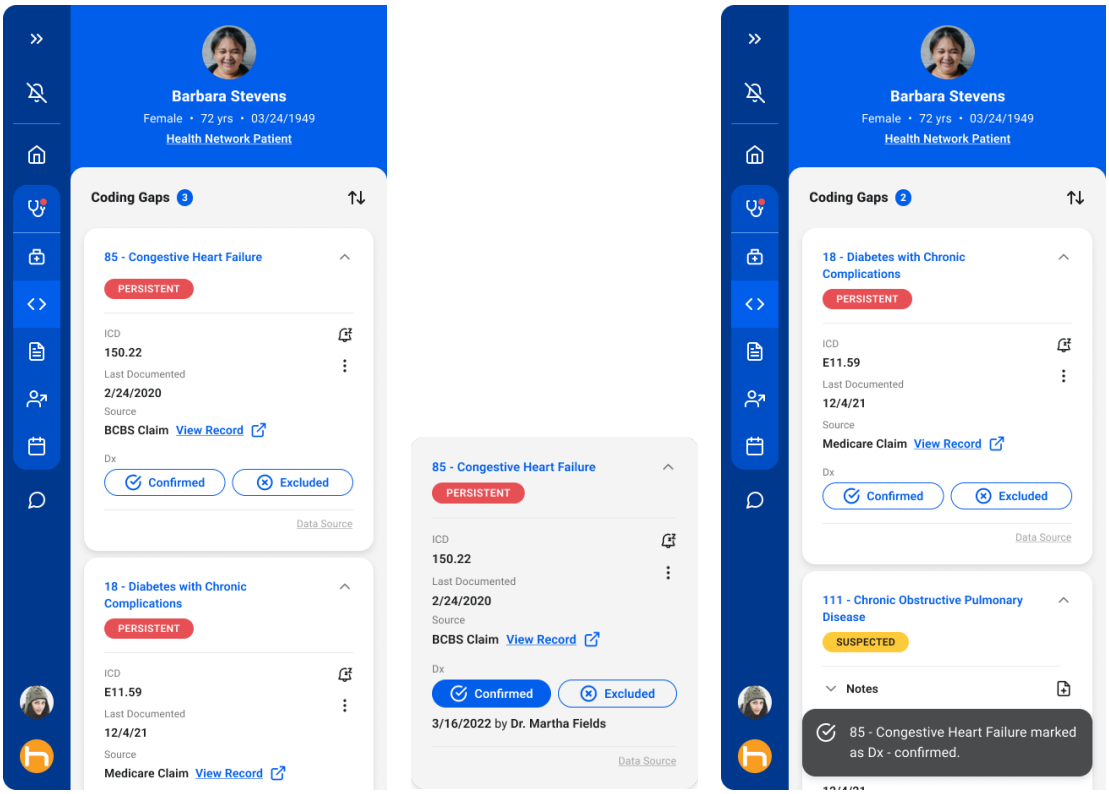
Opportunities to address medical conditions that support complete burden of illness documentation and risk adjustment coding are displayed with relevant details for the provider to consider at the point of care.

Confirming and Excluding Coding Gaps

Note: If sponsor has made it available, you can interact with the Coding Gaps by clicking **Confirmed** or **Excluded** for a specific coding gap.

Depending on the Sponsor's integration with Holon, interactions may be ingested by the data source to update coding opportunities.

Once you have made a selection, you will get confirmation of the action you've taken.



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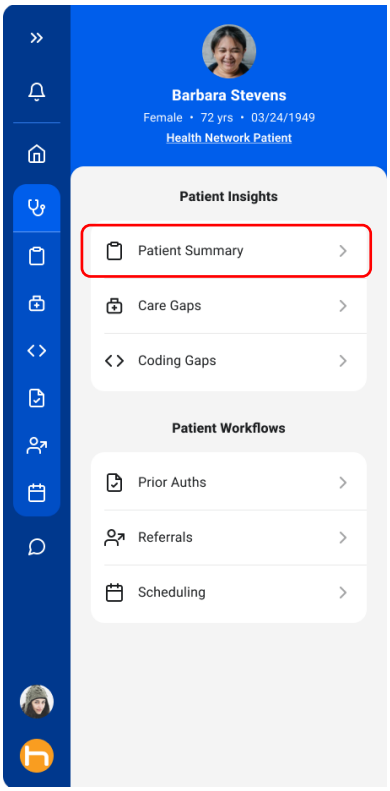
Patient Summary

Introduction

Detailed information summarizing the patient's needs, risks, utilization, cost, and other factors provide an efficient snapshot of the patient in one easy-to-access location.

Note: The category names you see may differ depending on what your sponsor has enabled or customized for your organization.



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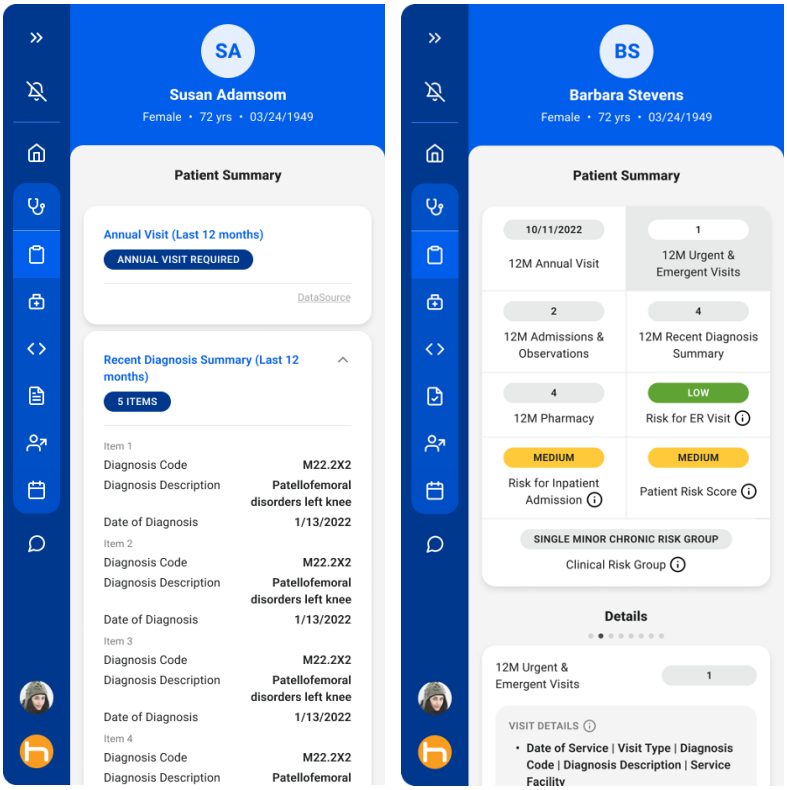
Depending on your organization, you may see different content in the Patient Summary view. Here are some examples of Patient Summary content you may see.



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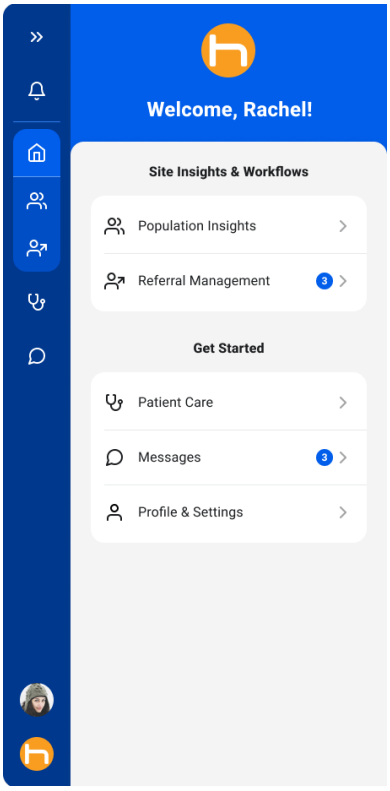
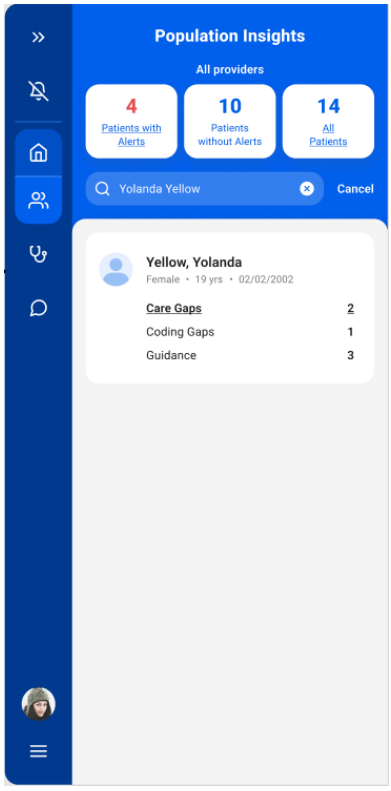
Population Insights

Introduction

Note: If the Population Insights module is enabled for you, you'll be able to access it from the Home Screen.





The top of the Population Insights screen shows a summary for all providers, including:

- Number of patients with alerts
- Number of patients without alerts, and
- Total number of patients

The **Search** feature helps you find patients in the system and displays alerts specific to that patient. (More on that later)

In the **Insights per Provider** section, you can drill down by clicking on a specific provider.

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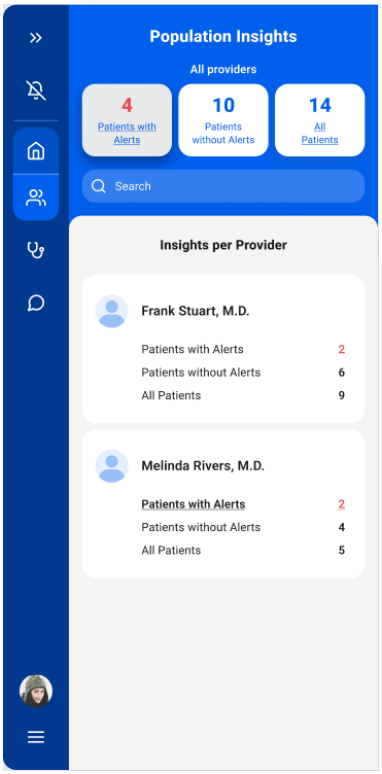
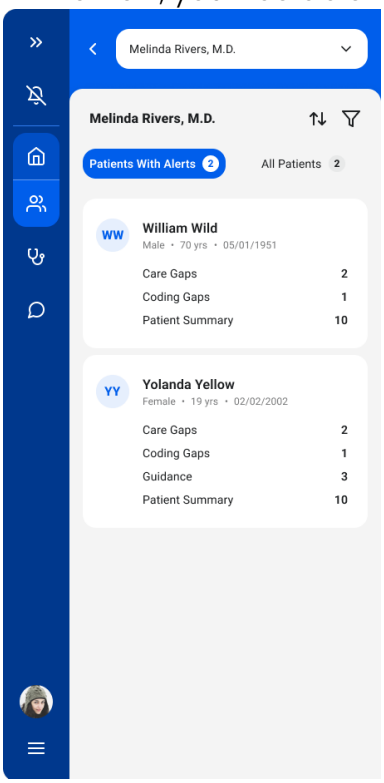
By clicking on the **Patients with Alerts** link, you can further drill down to see details / alerts for patients that are specific to that provider.



In this view, you'll be able to view alerts by patient.



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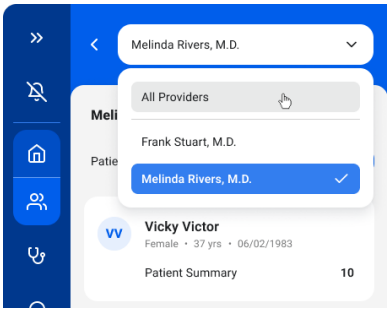
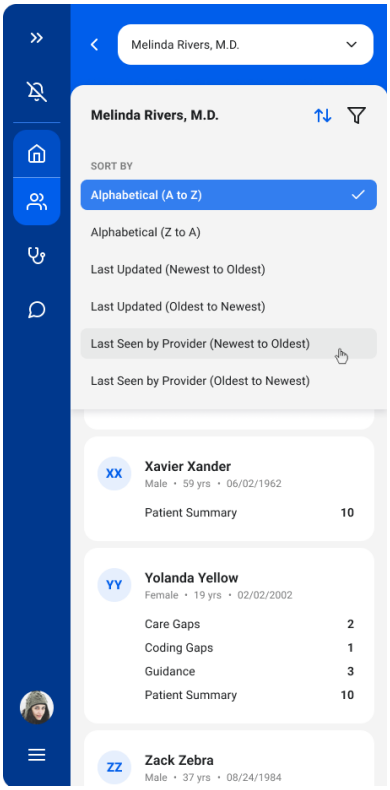
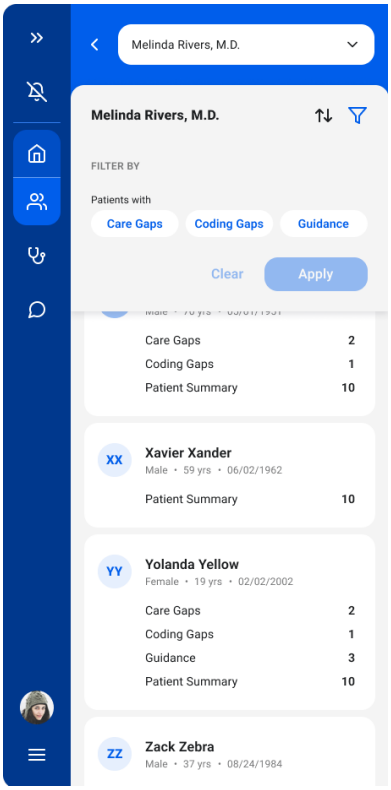
Using the drop-down menu, you can also display alerts for other providers or for all providers.



You can also use the **Sort** or **Filter** options to help you narrow down your results.





Search

The **Search** feature helps you find patients in the system and displays alerts specific to that patient.

Use the Smart Search feature by typing in the first few letters of the patient's name or date of birth. The search will start showing you results that match your criteria.

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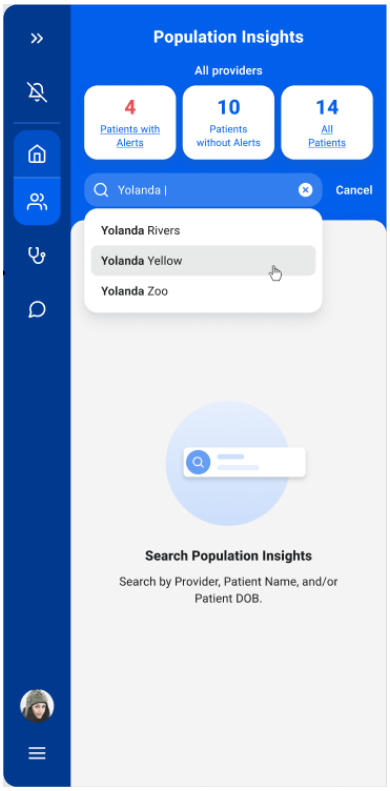
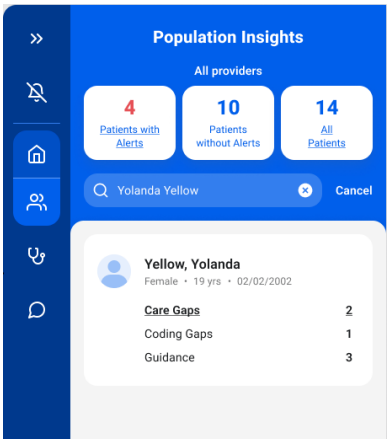
Select the patient from the list.



The system will show you the number of alerts/notifications available for that patient.

Click on the alerts/notifications to further drill down into the specific gap for that patient. This will open up details for the gap in context of the patient.



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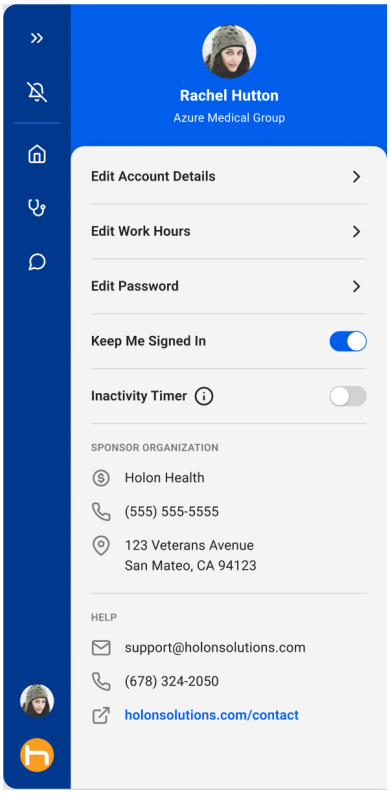
Help & Support

Contact your organization's administrator for basic user support (password reset, account creation, etc.)



For all other support (ex: outages, feature issues, etc.), please contact support@holonsolutions.com.

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