

Annie App for Clinicians Quick Start Guide



U.S. Department of Veterans Affairs

Veterans Health Administration Office of Connected Care

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Overview

The Department of Veterans Affairs' (VA) Annie mobile application (app) is a Short Message Service (SMS) text messaging capability that promotes self-care for Veterans enrolled in VA health care. Patients using Annie receive automated prompts to track and monitor their own health and motivational/ educational messages. Annie also sends messages from the patient's local VA medical center.

NOTE: Annie is for patient self-care and not for direct texting between Veterans and staff.

The Annie App for Clinicians allows clinicians to use and create care protocols that allow patients to easily submit their health readings back to Annie. Messages and patients' data is stored in the Annie system where clinicians can view the texts and readings as needed.

Annie is named after Lieutenant Annie G. Fox, the first woman to receive the Purple Heart for combat. She was Chief Nurse in the Army Nurse Corps at Hickman Field, Pearl Harbor.

General Info



Prerequisites

To use the Annie App for Clinicians, you must have Veterans Health Information Systems and Technology Architecture (VistA) credentials.



Log in

Access the Annie App for Clinicians through the Single Sign-On Internal (SSOi) Login Screen. Tap **Sign in with VA PIV Card** and follow the normal process for logging in with a VA PIV Card.



Admin View, Staff View, Broadcast Admin, System Admin and Facility Team Admin

The Annie App for Clinicians offers:

- Staff View Find and register a patient, view and assign a protocol, edit active protocols, review messages to and from a patient, see charts and tables of patient data.
- Admin View Create and edit protocols assigned to patients in Staff View.
- Broadcast Admin Send messages on behalf of your VA medical facility to all Veterans who are registered in Annie and
 opt in to receive messages from your VA medical facility.
- System Admin (only available to a limited number of users) Manage permissions for staff users, edit the response
 messages for Annie's text commands (Help, Pause, Resume, Start, Stop), set default values for measurements and create
 new measurement readings.
- Facility Team Admin (only available to a limited number of users) Create and edit facility teams.

The Staff View is available to all users. You may also have Admin View, Broadcast Admin, System Admin and/or Facility Team Admin privileges.

NOTE: Not everyone will have access to Admin View, Broadcast Admin, System Admin and/or Facility Team Admin. While each clinician with appropriate scope of practice privileges will be able to assign and edit protocols for their patients, only some staff members will be able to create protocols and even fewer to send messages on behalf of the VA facility and/or manage permissions and set defaults.

If you are able to access Admin View, Broadcast Admin and/or System Admin, you can switch among them by tapping the greeting that says, "Welcome, [Your First Name]." A drop-down menu will appear, and tap one of the potential opposing views: **Switch To Admin View, Switch To Staff View, Broadcast Admin, System Admin** or **Facility Team Admin**.

Staff View

Find and register a patient, view and assign a protocol, edit protocols, review messages to and from a patient, see charts and tables of patient data.



Navigate the Staff View Screen

In Staff View, there are five tabs that allow you to navigate:

- Patient Search Search for a patient by last name, full social security number (SSN) or first letter of last name combined with last four digits of SSN.
- Patient Summary See information on the patients you consented.
- Protocols View and edit active protocols, audit changes made to inactive or active protocols, enable or disable protocols, assign protocols and adjust patient account settings.
- Message History See the conversation history between your patient and Annie.
- Reports See charts and tables of patients' health tracking data sent to Annie.

Tap on a tab to go to the corresponding screen.



Search for a Patient

There are two ways to search for a patient: use the Patient Search bar at the top of the screen, or the Patient Search tab. Enter patient last name, full social security number in the format of XXX-XX-XXXX or first initial of last name and last four digits of social security number in search bar. Tap **Search**, and a list of patients who match your search will appear. Tap the patient you would like to view, and you will go to the patient's Protocols screen. The patient's name and additional identifying information will always display at the top of screen in Staff View as you switch among the five tabs.





Understanding Protocols

Protocols use templates that send and collect information from your patient. Many protocols can be accessed by any Annie App for Clinicians' user, so you can use protocols other users have created. There are five types of protocol templates:

- Vitals Request and receive readings from patients, such as blood pressure. You will have the option for designating the lowest and highest valid readings for patients, as well as low level, critical low level, high level and critical high level readings that fall within the thresholds you set but are still of concern in the Reading/Alerts section of the Vitals template. Patients will receive alerts if their readings fall into these categories, if their readings are rising or falling rapidly or the repeat alert type and occurrence is reached. Because readings do NOT trigger alerts to a VA clinician or health care team, make sure all patient-facing alerts are clinically relevant and that the alert messages you create are easily understandable to your patient. Please ensure your patient understands that alerts will not trigger care team action and knows what to do if a reading invokes an alerts. The basic alerts are as follows:
 - Critical Low Level Alert: A Reading at this level triggers a Critical Low Level Alert Message to the patient. Valid readings at or below this level are considered very low.
 - Low Level Alert: A Reading at this level triggers a Low Level Alert Message to the patient. Valid readings at or below this level are considered to be low.
 - High Level Alert: A Reading at this level triggers a High Level Alert Message to the patient. Valid readings at or above this level are considered to be high.
 - Critical High Level Alert: A Reading at this level triggers a Critical High Level Alert Message to the patient. Valid readings at or above this level are considered to be very high.
- For additional information on alerts, see the Annie App for Clinicians User Manual and Readings and Alerts documents found on the Annie App for Clinicians/VA App Store page (mobile.va.gov/app/annie-app-clinicians).
- Motivational/Educational Send messages to patients that do not request a response, but help motivate or educate
 patients. NOTE: Pre-drafted Motivational/Educational messages are not built into Annie; you will need to write
 messages or edit a protocol that has already created motivational/educational messages.
- Categorical Request and receive measurements and information from patients that may be more qualitative than vital readings, such as mood over time. You can designate accepted responses, and whichever response a Veteran chooses will invoke a specific response from Annie (e.g., acknowledging that a Veteran is "happy" or "sad"). NOTE: Additional messages to the patient may be triggered depending on the patient response.
- Yes/No Request and receive a response to yes/no questions, such as "Did you exercise today?" NOTE: Additional
 messages to the patient may be triggered depending on the patient response.
- Scaled Response Request and receive a numeric response to a question, such as asking the patient to rank their pain
 on a scale of one to ten. You can designate a value for the lowest and highest valid reading. NOTE: Additional messages
 to the patient may be triggered depending on the patient response.

NOTE: Different protocol templates can be linked together so that a specific response to a message triggers a chained template to send a message to the patient (e.g., a critically low caloric intake response can trigger a chained blood glucose template to send a message to the Veteran).

Chaining can be done between:

- Vital Templates
- Categorical Templates
- Yes/No Templates
- Scaled Response Templates

IMPORTANT: Messages sent to patients should NEVER reference Section 7332 information, which includes information pertaining to drug abuse, alcoholism or alcohol abuse, infection with the human immunodeficiency virus (HIV) or sickle cell anemia. VA's approval to use the system is conditional on the exclusion of this information.



Write an Ideal Message

Each protocol has a message area, which you can draft in the Admin View and customize in the Staff View, and will be the exact message the patient receives. **REMEMBER:** Messages are designed to motivate and help patients improve their self-care, so write all messages in ways that are inspiring and friendly.

If you request a reading that requires the patient to respond, please include the format and key word they should use in their response within the Service and Reminder Messages, which are explained below. When a patient responds to a request from Annie to send in a reading (e.g., blood pressure measurement), the response MUST START with a keyword or abbreviation so that Annie understands the message. Annie uses these keywords to know what kind of information the patient is sending. The letters can be upper or lower case. Spelling has to be EXACT. Depending on the information the patient is sending, the message must begin with one of the following keywords or abbreviations (see terms in bold):

When Annie requests this information	The patient must start the message response with (not case sensitive)
Blood Pressure	BP or BLOOD
Pulse Oximetry (SpO2) or Oxygen level	OX or OXYGEN
Blood Glucose or Sugar	BG or GLUCOSE or SUGAR
Glucose Before Eating	BGB or BEFORE
Glucose After Eating	BGA or AFTER
Weight Loss	WE or WEIGHT
Caloric Intake	CAL or CALORIES
Amount of Exercise	EXE or EXERCISE
Temperature	ТЕМР
Pulse	PULSE

For example, if the request is to send in a temperature reading, then write the Service and Reminder messages to include the appropriate keyword or abbreviation. "Please send me your temperature in the following format: TEMP 98." If the patient responds without the using the correct format, Annie will not understand the message.

Enable or Disable a Protocol

Once inside the Patient Record in Staff View, tap **On/Off** next to Status. A pop-up box will appear asking if you are certain you want to enable or disable the protocol. Type in the reason for the change, and tap **OK**. **NOTE:** Once a protocol is disabled in Admin View, it cannot be assigned in Staff View.



Assign Protocols

You can assign protocols to patients who are registered with Annie and who have not paused or stopped protocol messaging. First search for and select the patient to whom you would like to assign a protocol. Tap **Assign New Protocol**, and you will go to a list of protocols that have already been created. Tap **Assign New Protocol** for the protocol you would like to set up for your patient, and follow the prompts to customize the protocol as desired.

IMPORTANT: Please ensure that your patient understands the basics of the protocol, such as benefits, content of the messages (PHI, PII, condition) and consents to its use with understanding of the bullets noted in the **CONSENT NOTE**. As part of receiving a patient's consent, please adhere to the scope of practice considerations noted in the **SCOPE OF PRACTICE NOTE**. Both the CONSENT NOTE and SCOPE OF PRACTICE NOTE may be found in the (11) Register a Patient section below.

NOTE: Before you assign a protocol, make sure the health readings information (e.g., blood pressure) requested is not already requested by another protocol.

Audit Trail

Edit or View a Protocol

Once inside the Patient Record in Staff View, if a protocol is enabled or a draft, you will be able to edit or view its details. Tap **Edit/View** under the active protocol you would like to edit or view. You will go to the protocol's screen, which shows its name, description, and template(s) you set up. Tap the template associated with the protocol that you would like to edit. A drop-down list of the protocol's settings will appear, which will depend on what type of protocol you are editing. Tap the settings heading you would like to edit. Adjust the areas like you would when setting up the protocol. Tap **Save**, or to exit without saving, tap **Cancel**.



Register a Patient

To register a patient, you must be in Staff View and have searched for and selected the patient you would like to register. Tap **Edit Account Settings** under the patient name at the top of the screen, and you will go to an Account Screen. On the Account screen, tap the **Consent to Participate** tab, and tap **Annie Information and Disclosure Factsheet**. A popup box with background information about Annie, patient responsibilities and risks will appear. Read over the information, and provide an overview to your patient to make sure he/she understands and consents to the Annie messaging service (see **CONSENT NOTE** below). Tap **Dismiss** to close the box. Tap the checkbox next to "Patient-Provider Informed Consent Discussion Occurred" to confirm the patient understands and agrees to participate in Annie.

CONSENT NOTE: As part of receiving your patient's Consent to Participate, please ensure that your patient understands and agrees to the following:

- Using Annie is voluntary and is designed to support patient self-care.
- Annie messages are automated and not regularly monitored by the health care team.
- Annie is not the right place to ask for help. Patients should call their health care teams directly with health concerns.
- SMS text messages are not secure and there could be costs for sending and receiving texts.
- Collection of a patient's information by Annie is subject to federal law.
- Sending Start and Stop begins and ends participation in the program.

When complete, please note the patient's participation in the medical record.

You may notice that some of the information in these sections is already filled out if the patient has self-registered to use Annie. However, you will still need to discuss consent with your patients in order for them to use the Protocols features of Annie, otherwise they are limited to only receiving VA medical facility broadcast messages.

IMPORTANT: While the checkbox is only selected once, the patient's informed consent to use Annie should be obtained each time a new protocol is assigned to the patient and the consent/assignment noted in the medical record.

SCOPE OF PRACTICE NOTE: With regard to Scope of Practice considerations, only licensed clinicians, such as the following, practicing within the licensure that they hold may solicit verbal consent from a patient to assign a protocol:

Licensed Clinicians				
Licensed Practical Nurses (limited)*	Registered Dieticians			
Nurse Practitioners	Registered Nurses			
Pharmacists	Social Workers			
Physicians	Therapists			
Physician Assistants				

- Licensed clinicians are responsible for abiding by their relevant State Practice Act and any laws governing their profession and applicable to their location.
- *An LPN can obtain informed consent, if the protocol is ordered by a physician, registered nurse, or other appropriate clinician, and if the state in which the LPN is practicing allows it.
- A clinician need not be in the Annie system when obtaining a patient's consent. If another team member will complete enrollment and assignment of a protocol, then the licensed clinician should create an order in CPRS (the medical record) to initiate.
- All clinical team members can review responses sent to Annie from VA patients.



View Message History

First search for and select a patient whose message history you would like to view, and then tap the **Message History** tab. You will see the details of the messages exchanged between Annie and your patient, including the name of the protocol, the date and time the messages were sent, the contents of the message, whether the message was sent by Annie or the patient and any alerts that were triggered by the patient's responses.

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02/0	1/2016				08/22/2018	Reset
		≣			P	
		Show All	-		Protocol Broadcast	
		1	2 3 4	5 6	7 8 9 10 11 12 13 14 15 16 17	18 19 20
	Protocol	Date 🗸	Time	Alert	Message	Status
ø	testing 9/8/2016	02/28/2017	20:50:00	-	Reminder Please enter your oxygen in the format OX95 Thank you	Annie Sent
0	testing 9/8/2016	02/28/2017	20:45:00	-	Please enter your oxygen in the format OX95 Thank you Annie	Sent
۲	testing 9/8/2016	02/28/2017	19:50:00	-	Reminder Please enter your oxygen in the format OX95 Thank you	Annie Sent
۲	testing 9/8/2016	02/28/2017	19:45:00	-	Please enter your oxygen in the format OX95 Thank you Annie	Sent
ø	testing 9/8/2016	02/28/2017	18:50:00	-	Reminder Please enter your oxygen in the format OX95 Thank you	Annie Sent



View Patient Reports

Based on the readings a patient has sent to Annie, the Annie App for Clinicians will be able to display a report. The report consists of a chart and a table of a patient's readings information. First search for and select a patient whose reports you would like to view. Then tap the Reports tab. Under Filters, tap the measurements under the Readings heading you would like to view. Tap either **1w** (one week), **1m** (one month), **3m** (three months), **6m** (six months), **1y** (one year) or **All** to adjust the data covered in the report. **NOTE:** If your patient has not submitted adequate data, some buttons will not be available. A summary of the selected readings will be on the right including the lowest reading, the highest reading, the average and current readings and the number of days data was sent over the time period selected.

To see the data in graphical or table format, tap **Combined Report** (to view all measurements selected) or **Reports** next to a specific measurement. You will go to a graph of the selected data. Tap **Table** to view the data as a table and **Chart** to return to the graph from the table.

Patient Summary	Patient Search		Protocols	Mee	sage History		<u>Reports</u>
Reports	6 Month	Summa	ary				Combined Report
Filters	Weig	ght					Report
Readings	W	eight	Lowest	Highest 300	Average 214	Current	Days Reporting
 Blood Pressure Caloric Intake 			100		214	200	-
Glucose Before Eating	Puls	e Oxi	metry (SpC	02)			Report
Pulse Oximetry (SpO2) Temperature Weight	si %	Sat	Lowest 87	Highest 99	Average 94	Current 95	Days Reporting 3
Date Range 1W 1M 3M 6M 1Y All	Calo	ric Int	ake				l Report
Reset	Cal	ories	Lowest	Highest	Average	Current	Days Reporting

Adjust Patient Reports

You can change the information shown through the filter. To access the filter, tap **Filter** then use the following options to adjust the data shown:

- Readings Tap the checkbox(es) next to the measurements you would like to view.
- Date Range Tap 1w, 1m, 3m, 6m, 1y, All or Custom, and enter the From and To dates for which you wish to view the data.
- Navigator Use the Navigator to adjust the readings shown in the Graph. The Navigator is a means to zoom in and
 out, as well as select certain portions of the data within the specified Date Range. The Date/Time Line (blue arrow) will
 change accordingly, as you adjust the Navigator (red arrows). If you tap a handle on the Navigator, you can shorten or
 lengthen the data displayed. If you move the horizontal scroll bar, you can slide to see the dates and data that fall within
 the segment. For example, if you set the vertical bars so that the window of time is for approximately two months, you
 can then use the scroll bar to move the two-month time frame from April-June to September-November.

KEY TAKEWAYS: The entirety of data available for a reading for a specified Date Range is always shown in the Navigator. The graph data shown in the chart depends on how you use the Date Range and Navigator. These can be used to limit or expand the data shown. As an example, by dragging the leftmost handle on the Navigator to the right, less data is shown in the chart. If there is a lot of data displayed (e.g., cluster of points), you can use the navigator to zoom in and out to view the trend more clearly. The Date/Time Line is the horizontal line, or axis, for the chart and changes as the data being viewed is changed. The Date/Time Line is the horizontal reference for the data shown in the Graph section of the Chart.

Reports

Date Range: All

🔻 Filters 🗸



Table

* Patient data within the set filters is only available for 03/21/2015 to 05/08/2018. The charts have been adjusted for display of patient data.



Admin View

Create and edit protocols that can be assigned to patients in Staff View.

Add a Protocol

To create a protocol, make sure you are in the Admin View, and then tap **Add Protocol** to go to a Protocols screen. Type in the Protocol Name and Description. Tap the bar under Level of Designation, and tap **National**, **VISN**, **Facility** or **Team** to designate who will have access to the template. If you tapped VISN, Facility or Team, a blank Select one or more VISN/Facility/ Teams(s) bar will appear. Begin typing in the name of the VISN/Facility/Team, then tap your selection from the drop-down list that appears. Begin typing and tap the VISN/Facility/Team from the drop-down to add an additional selection. Type in the Focus Area (the Focus Area is like a tag that will help you categorize the protocol (e.g., blood pressure)). Add a Template, and tap the template you would like to use New Vitals, New Motivational Educational, New Categorical, New Yes/No or New Scaled Response).

Tap **Add**, or tap **Cancel**, to close the pop-up Add Template box without adding a template. After selecting the type of protocol, you will need to specify the name of the template. Please choose a meaningful name for the template as the patient will see this name in the Veteran facing side of the app. Next, complete the settings for the template. The format will depend on the type of template you selected. Tap the headings of the settings you may need to complete, which will expand the template details below. Set the details of the setting, usually by tapping to fill in a circle or to select an option from a drop-down menu. Tap **Save**, and a pop-up box will appear confirming that your changes have been saved. Tap **OK**, and you will be taken back to the Protocols screen.

IMPORTANT:

(1) If you are adding a Vitals template, please ensure that the alert thresholds and messages for your Vital template are appropriate to your patient population and your VA medical facility's clinical procedures for providing care.

(2) Creating a reminder message is not required, but is strongly recommended to help ensure your patient submits readings and receives the appropriate responses from Annie.

(3) Visit the Staff View section of the Quick Start Guide to learn more about protocols.

	Protocols		
Add Protocol			
		Save	Save as Draft Cancel
Please complete information about the new protocol.			* indicates a required field.
Protocol Name *			
Description *			
Level of Designation *			
			v
Focus Areas *			
Tags, e.g.: blood pressure, glucose before eating			
Add a tag			
Select inside the Focus Area text field and use the down arrow key on the k	eyboard to view all available focus a	rea tags.	
Templete(c)			
remplate(s)			
Select a template(s) to customize.		Insert Tempi	ate Copy 🔂 Add a Template
	linsert Template Copy	Add a Template Save	Save as Draft Cancel

Broadcast Admin

Send messages on behalf of your VA medical facility to all Veterans who are registered in Annie and have opted in to receive messages from your VA medical facility.



Add a Broadcast Message

To create a new broadcast message, tap **Add Message**. Tap the radio button next to Select Facilities or All Facilities to designate the group of subscribers you want to send the message to. If you tapped the radio button next to Select Facilities, your medical facility will appear below and you will have the ability to enter additional facilities. Type in the name of any additional facilities you would like to add, and tap the facility name from the drop-down menu that appears matching your search. Tap the radio buttons next to Yes or No to include a topic of interest for the message. If you tapped the radio button next to Yes, a drop-down menu will appear below. Tap the drop-down, and tap the topic of interest of the message. Type in the title up to 40 characters (the title will not be sent as part of the message). Type your message up to 160 characters, and specify how often your messages should be sent. Tap **Save**, and then tap **OK**.

Filter		
Search Broadcast Messages		Q
Created From	Created To	
11/18/2016	03/16/2018	
Progress	View	
All		v
Single Facility I	Broadcast Message test	1
Single Facility I	Broadcast Message test	
Single Facility I Created By: Created On: 03/16/2018 Progress: Pending Delivery	Broadcast Message test	1
Created By: Created On: 03/16/2018 Progress: Peruling Delivery Message	Broadcast Message test	

Filter your Broadcast Messages

After you have created messages, you can easily find them by using the filters on the Broadcast Admin main screen. As you change the filters, the messages below will adjust accordingly. To go back to viewing all of your messages, tap **Reset**.

System Admin

System Admin (only available to a limited number of users) allows you to manage permissions for staff users, edit the response messages for Annie's text commands (Help, Pause, Resume, Start, Stop), set default values for measurements and create new measurement readings.



Manage Staff

Tap **Manage Staff**, and tap the radio button next to where you would like to search for staff, within Annie or Other VA Databases. Enter the last name of the staff member you wish to find. Tap **Search** and a list of staff members who match your search will appear. Tap on the staff member you would like to view. Under Select Permissions, check the box next to Give Access or uncheck the box to remove access to Broadcast Admin, Clinical Administration (Admin View) or Facility Team Administration. If Clinical Administration is selected, a Protocol Creation Level drop-down will appear. Tap the bar under Protocol Creation Level, and tap the **National**, **VISN** or **Facility**. Tap **Save** to confirm you would like to cancel), and a pop-up Success box appears that confirms the changes. Tap **OK** to return to the Manage Staff screen.

Manage Staff	Text Commands	Measurement Settings
Manage Permissions f	or Staff Users	
← Back to Search Results		
Manage Permissions for:		
MobileAppProvider, One		
IEN ID:		
Facility: HAMPTON VA MEDICAL CENTER (dfn-590)		
Select Permissions:		* indicates a required field
Broadcast Administration		
Clinical Administration		
Protocol Creation Level: *		
	\$	
Facility Team Administration		Save Cancel

Measurement Settings

Tap **Measurement Settings**, and tap **Settings** of the measurement you would like to set default values for. Type in the Lowest Valid Reading, Highest Valid Reading, Critical Low Level Alert, Critical High Level Alert, Low Level Alert and High Level Alert, and tap **Save**. A pop-up Success box appears that confirms the changes, and tap **OK**.

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Facility Team Admin

Creating a Facility Team

Facility Team Admin allows you to add and edit teams at facilities: **NOTE:** Only certain staff members designated by the facility will have Facility Team Admin rights. To add a team, tap **Add Team**. Type in the team name and a brief description for the purpose of the team. You will be prompted to add team members and clinicians. Follow the steps to add team members, then tap **Save** to add the team or **Cancel** to return to the Add Teams screen without adding a team. To edit a team, tap the team you would like to view or edit. You can edit the team name, description and add or remove team members. Tap **Save** to save your changes.

Add Team	
Facility	* indicates a required field
Team Name *	
Enter a name for this team	
Description *	
Provide a brief description for the purpose of this learn	
Team Membership *	
Open	
	Add Team Members
Team Members Not Found	
There are no team members to show in this team	
	Save Cancel

Help and Additional Information

Additional training materials for the Annie App for Clinicians

More resources, such as a User Manual, Slideshow and FAQs, can be found on *mobile.va.gov/appstore*, and search for the app to access the resources. To go to the site from the app, tap the **Help** tab at the top of the screen, and tap the **Training Materials** hyperlink.

Help Desk Information

If you need technical assistance with the Annie App for Clinicians, dial **1-844-482-6624** to speak with a VA representative. The Help Desk is open weekdays from 7 a.m. to 7 p.m. CT. For TTY assistance, dial 711.

Emergencies

If you feel that you or your patient's information may have been compromised, contact your local VA medical facility to obtain the contact information for your Privacy Officer. To locate your local VA medical facility, visit VA's Facility Locator: at *http://www.va.gov/directory/guide/home. asp?isflash=1*. NOTE: You should never use this app in an emergency situation.