Online Portal Guide
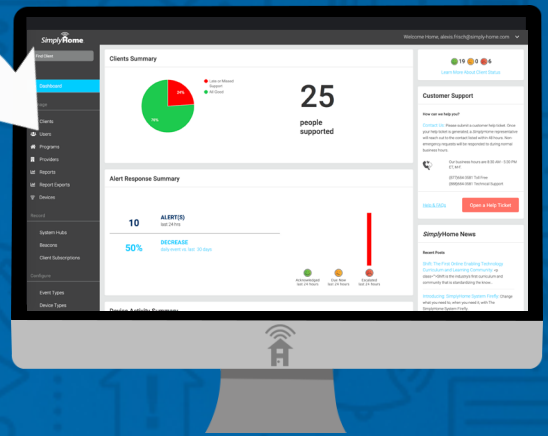## *Simply*Home System - Firefly

a guide by: **Simply*H*ome**

CONTENTS

Getting Started

Logging into the Portal

- If you haven't already confirmed your email, follow those instructions first
- Go to https://www.portal.simplyhomeapp.com in any web browser
- The portal is optimized for desktop/laptop viewing, not mobile devices
- You should see a Sign in screen
- Enter your email address, and your password
- Then select 'Log In'

Confirming your Email Address

- You should have received 'Confirmation Instructions' in your email
  - If you have not received them, check your promotions or spam folder
  - If you still cannot find them, you can request that they be resent
    - Go to https://www.portal.simplyhomeapp.com in any web browser
    - Select "Didn't receive confirmation instructions?"
    - Enter your email address
    - Select 'Resend Confirmation Instructions'
- Open the email
- Read the Confirmation Instructions
- Click on "Confirm my account" in this email.
- You will be directed to the login page, and you should get a confirmation message at the top of the page noting that your account has been confirmed.
- At this point, please reset your password (see separate instructions)
- Following resetting your password, please verify your mobile number

Resetting your Password

There are three ways to reset your password:
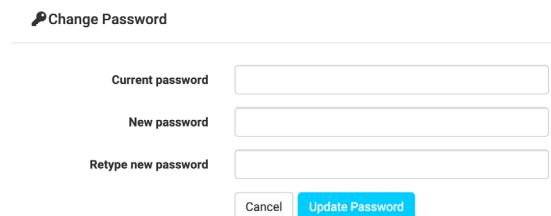
From the login screen

- Go to https://www.portal.simplyhomeapp.com in any web browser
- Select "Forgot your password?" link on the login page.
- On the following page, enter your email address and then click "Submit."
- You will receive an email with a reset password link.
- Click on this link and type a password of your choosing.
- After successfully entering your new password, you will be taken to the *Simply*Home Dashboard to log in.

From the Portal

This step requires you to know your current password

- When logged in to the portal, you can change your password from the Profile page
- In the portal, select the dropdown option ( ) at the top right of the page, just to the right of 'Welcome Home, <your email address>'
- Select 👤 Profile
- Enter your current password
- Enter the new password you'd like
- Enter the new password again
- Select 'Update Password'
- You will be taken to the SimplyHome Dashboard, and will see a message 'Successfully updated your password'

🔑 Change Password

Current password

New password

Retype new password

Cancel Update Password

From the Update User section

- ***Only ProviderAdmins can access this section***
- ProviderAdmins can change the password for any user associated with the same provider
- See the section titled 'Edit a User'

Verifying your Phone Number

- You should have received a text message from *Simply*Home Automated Alerts with a token code (something such as "e0a832") when your user is created
- Log into the portal with your assigned email address and password
- In the portal, select the dropdown option (∨) at the top right of the page, just to the right of 'Welcome Home, <your email address>'
- Select 👤 Profile
  - ○ *If you have your verification token, and you received it in the last 24 hours*
    - ▪ Enter your Verification Token
    - ▪ Select 'Verify Mobile Number'
    - ▪ A green message at the top of the screen should indicate 'Your mobile-number is successfully verified.
  - ○ *If you have not received your verification token, or it has been more than 24 hours since you received it*
    - ▪ Select Re-Generate Verification Token
    - ▪ Check your text messages again, and get your new verification token
  - ○ *If you do not see an option to verify your phone number*
    - ▪ Your number has already been verified

Locating Client Information

- When logged into the Portal, select the Client section on the left menu
- You will see a list of accessible clients
  - ○ If you do not have access to a client you expect to have access to, please [open a help ticket](#)
- Find the client you'd like to see information about
  - ○ You can use the *search bar* at the top right to search for the client by name
  - ○ You can also sort the clients by name, provider, program, city, etc using the gray *sort arrows* next to each column header ⇕
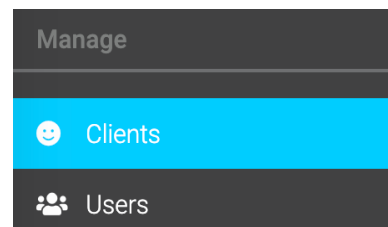
- Once you see the name of the client on the screen, select the client's name to be directed to the client summary page
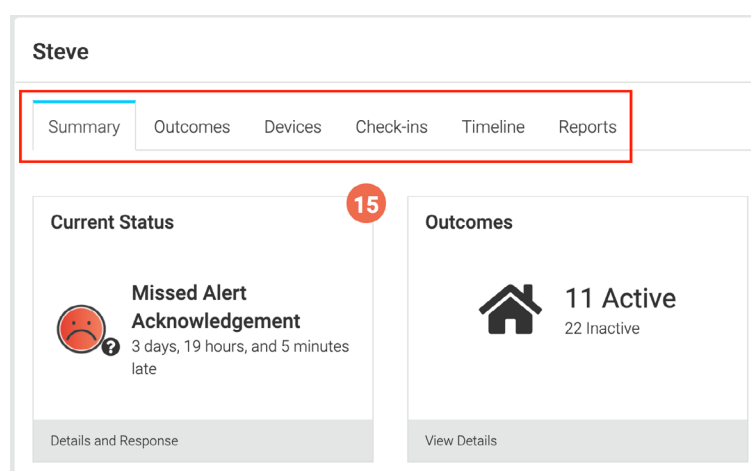
  - The client summary page gives information about:
    - The client's current status (see Identifying Client Support Needs / Resolving Client Status for more information)
    - The number of outcomes set up and active for the client
    - The client's basic information (program, address, subscription type)
    - The client's support team and their roles and contact information
    - The System Health (see Understanding Client Systems - System Health for more information)
- In addition to the client summary page, using the horizontal tabs at the top of the screen, just below the client's name, you can access details about:
  - Outcomes
  - Devices
  - Check-ins (if the client is subscribed to the check-in feature)
  - Timeline
  - Reports
- *There are individual help sections on understanding and using each section. Please see the appropriate section for details.*

Accessing Help

Opening a Help Ticket from the Portal

- When logged into the Portal,
  look at the right side of of the screen
- You should see a 'Customer Support' section
- At the bottom right of that section,
  there is a button 'Open a Help Ticket'
- Select that button
- It will open a new page with a form to fill out
- Fill out the form to the best of your knowledge
- Select 'Submit Support Request'

Customer Support

How can we help you?

Contact Us: Please submit a customer help ticket. Once your help ticket is generated, a *Simply*Home representative will reach out to the contact listed within 48 hours. Non-emergency requests will be responded to during normal business hours.

Our business hours are 8:30 AM - 5:30 PM ET, M-F.

(877)684-3581 Toll Free
(888)684-3581 Technical Support

Help & FAQs   Open a Help Ticket

Users

Viewing User Information

Your ability to do this depends on which level user you are:
- Provider Administrators, Client Managers, and Client Staff can view any user for the same provider.
- ClientOwnAdmin users cannot view any users, other than their own.

To view those users you have access to, once logged into the portal
- Go to the left sidebar, 'Users' section
- A list of users will be displayed
  with some basic information about each user
- Select a user's name to view additional details, such as sign-in dates and times, and the clients they support
- If you are having trouble finding the user whose details you'd like to view, you can use the *search bar* at the top right, or the *sort arrows* to the right of each column header

☺ Clients
👥 Users
🏠 Programs
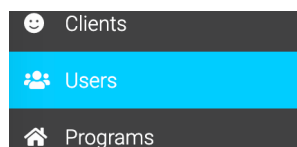
Creating a New User

- *Important!*
  - Provider Admin users can only create Client Manager and Client Staff users
- Go to the User section on the sidebar
- Select the red + at the bottom right
- Enter the email address **Important!** *The email address cannot be changed.*
- Choose a password. We recommend suggesting the new user change their password upon first log-in, to keep their account secure.
- Enter the user's first name and last name
- Enter their cell phone number **Important!** Pay close attention to the formatting instructions accepted format: <plus_sign><country_code><hyphen_sign> <10-digit-mobile-number>. For e.g +1-8989898989
- Select a role (see vocabulary page)
  - **Client Manager**
  - **Client Own Admin**
  - **Client Staff**
- For some roles, you will then be able to select a Provider. (If a relevant provider is not in the dropdown, you may need to Add a provider separately).
- For some roles, you will be able to add clients. Find each client this user will support in the alphabetical list, and select each name. Then press the ⟩ to add them to the user's supported clients. (If you add someone by mistake, do the reverse; select the client's name in the Supported Clients list, and then press ⟨ to remove it from the Supported Clients list).
- You can optionally 'Mark User as Confirmed' and 'Skip Cell Number Verification'. *These are handy when setting up internal or test users, but should not be used otherwise without good cause.*
  - Mark User as Confirmed if you do not want them to receive emailed confirmation instructions
  - Skip Cell Number Verification if you are sure their cell phone number is correct, and you do not want them to receive a text requesting verification
- Select 'Save'
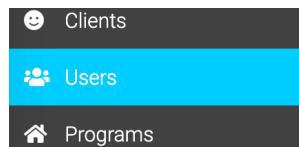
Editing a User

- *Important!*
  - Provider Admin users can only edit Client Manager and Client Staff users associated with the same provider
- Go to the User section on the sidebar
- Find the User you'd like to edit (you can use search)
- Update the fields you'd like to edit:
  - You can change the role assigned
  - You can change the clients assigned (for ProviderAdmins, ClientManagers, and ClientStaff users)
    - To add clients, find each client this user will support in the alphabetical list, and select each name. Then press the `>` to add them to the user's supported clients.
    - To remove clients, select the client's name in the Supported Clients list, and then press `<` to remove it from the Supported Clients list.
- Leave fields you do not want to change as-is
- **Important!** If you do not want to change the password, please *make sure that field is empty.* If it is not empty, you will receive a confirmation message asking if you are sure you want to change the user's password, to avoid passwords being inadvertently changed.
- Select 'Save Changes'
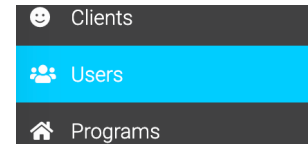
Programs

Adding a New Program

Only Provider Admins add programs for their provider agency

Add Program

* Name	Demo Program 1
* Provider	SimplyHome Internal

Client(s)

Available Clients

Emily Hudgins
Engineering Client
Hannah Client
Jason Ray
Lando Calrissian
Marketing Client
Princess Leia
Steve
Test Two
Tommy Boy

Supported Clients

Cancel   Save

- If a new Program and clients for that program need created, ***add the clients first.***
  - This will reduce your steps, but you can add clients later as needed
- To create a new Program, you will need to know the Program name and the names of supported clients in the program
- Go to the Program section on the sidebar
- Select the red + at the bottom right
- Enter the Program name
- The provider selection dropdown should automatically be assigned, based on the provider assigned to the logged in Provider Admin user
- Select all clients that belong to this program in the list
- Select the ⟩ icon to add the selected clients to the program
- Select 'Save'
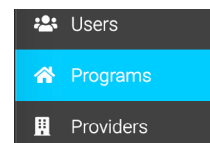
Adding Clients to an Existing Program

Only accessible Provider Admin users
- Go to the Program section on the sidebar
- Find the relevant program in the list
- Select the edit icon at the far right
- Find the client(s) you'd like to add in the Available Clients list
- Select them by clicking on their name - They will highlight blue when selected
- Select the ⟩ icon to add them to the 'Supported Clients' list
- Select 'Save'
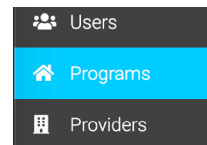
Removing Clients from a Program

Only accessible to Provider Admin users
- Go to the Program section on the sidebar
- Find the relevant program in the list
- Select the edit icon at the far right
- Find the client(s) you'd like to remove in the Supported Clients list
- Select them by clicking on their name - They will highlight blue when selected
- Select the ⟨ icon to remove them from Supported Clients
- Select 'Save'
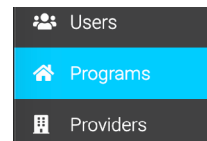
Clients

Editing Client Information

Only accessible to Provider Admin users
- Go to the Client section on the sidebar
- Find your client (you can use the Search bar to search by client name)
- Select the edit icon on the far right (you may need to scroll to see all columns if viewing from a smaller screen)
- Any information, *except the Time Zone*, can be changed.
- To change a client's support team, edit each User instead.
- To change a client's Program, edit the Program pages instead
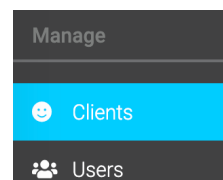
Client Subscriptions

Understanding Client Subscriptions

- SimplyHome offers three types of client subscription services.
- An understanding of each can be viewed on the vocabulary page.

Identifying Client Support Needs

- The smiley face color system is designed to help with client support needs

Client Status Color

Smiley faces statuses appear several places in the portal:
- On the dashboard, there is a section at the top right
  - It shows the number of clients you support who have 'green', 'yellow', or 'red' status, respectively
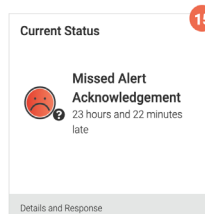
Learn More About Client Status

- On the client list page, to the left of each client's name is a green, yellow, or red face.
  - By default, those clients with a 'red' face are shown at the top of the list, followed by those clients with a 'yellow' face, and then those with a 'green' face

- On each client summary page, the current status shows a green, yellow, or red face with a short explanation.
  - See the current status section for details.

Whether a client's face is green, yellow, or red is determined by whether they currently need attention, and, if so, how urgently.

Client Status from Alert Activity and Acknowledgements

- 🙂 *Green Status - No Attention Needed* - All outstanding acknowledgements have been addressed, an outcome requiring acknowledgement has been edited or deactivated to no longer require action be taken, or no alerts are programmed to require acknowledgement.

- 😕 *Yellow Status - Attention Pending* - An alert currently requires acknowledgement. The timeframe given to acknowledge an alert (before escalating to red) has not yet passed.

- 🙁 *Red Status - Attention Missed* - An alert requiring Acknowledgement has been forwarded to backup responders. This can be automatic (due to a missed acknowledgemment) or intentional (forwarded by staff).

- 🙁 😕 🙂 *See Details* - Multiple factors can affect a client's status.
- To review the specific factor contributing to a status change, click "Learn More" under the status section of your client summary page.

Client Status from Check-in Subscription Activity

- 🙂 *Green Status - No Attention Needed* - All required check-ins and check-outs have been made, skipped, deactivated, or acknowledged as having been missed.

- 😕 *Yellow Status - Check-In Pending* - A check-in is due now (and the previous check-in was not missed), or a check-in requiring check-out has been checked in for, and the expected window to check out has not yet passed.

- 🙁 *Red Status - Check-In Missed* - The most recent check-in was missed, a check-in is due now, but the previous was missed, or a check-in has been completed and the expected window to check out has passed.

- 🙁 😕 🙂 *See Details* - Multiple factors can affect a client's status. To review the specific factor contributing to a status change, click "Learn More" under the status section of your client summary page.

Resolving Client Status

When viewing a client summary page (see 'Identifying Client Support Needs'), at the top left is a box detailing the client's 'Current Status'

- The box will contain a colored face (see 'Client Status' sections on the previous page or click the "Learn More" or help button links on the portal for more information)
- It will also contain a brief description of what is causing the status
- If multiple factors are affecting the client's status, there will be a number indicating how many factors are involved at the top right corner of the Current Status box.

Current Status   **15**

Missed Alert Acknowledgement
23 hours and 22 minutes late
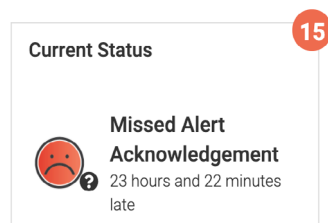
- Unless the client's status is green (No Special Attention Needed), there will be an option for 'Details and Response'
- Once that is selected, you will see details of what happened to cause the client's status to be red or yellow, when it happened, and what outcome or check-in was affected.

To turn Steve's' frown upside down, Steve has 15 items that need your attention.

Learn More About Client Status

Complete these tasks:
No response after 15 mins

< >

Missed Alert Acknowledgement
1 day, 22 hours, and 34 minutes late

At 4:51 PM EDT
Active on: 4:51 PM Monday
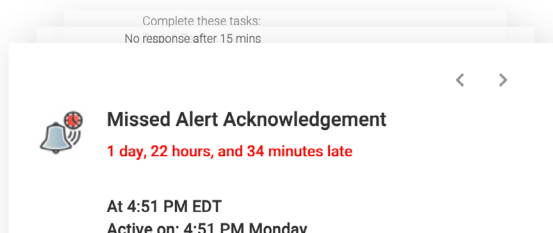
- If there are multiple factors affecting the client's status, you can page through the cards using the < > arrows at the top right of the card

- For pending alert acknowledgements, you can acknowledge or forward the alert (see 'Acknowledging Alerts' and 'Forwarding Alerts' for details)
- Once all items affecting the client's status have been handled, you will see a new message indicating "All activities requiring immediate attention have been resolved."
  - *Important! - If an alert is forwarded, rather than acknowledged, the client's status will shortly return to 'red' as the alert is sent out to the backup responder(s), since the primary responder was unable to address the issue.*

Understanding Client Systems

Viewing All Client Devices

Your ability to do this depends on which level user you are:
- Provider Administrators, Client Managers, and Client Staff can view any device for a client associated with the same provider
- ClientOwnAdmin users cannot view any devices.

To view those devices you have access to, once logged into the portal
- Go to the left sidebar, 'Devices' section

📊	Reports
📊	Report Exports
📶	Devices
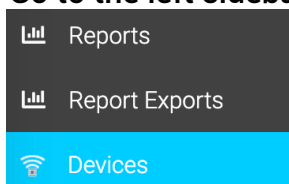
- A list of devices will be displayed, with some basic information about them.

Name	Client	Device Type	System Hub	Last Activity	Actions
Fake - Lexie's Front Door	Steve	Door	Lexie's Test System	04/09/20 4:13:00 pm	✏️ | 🟢

- To view additional details about any device, select that device's name
- If you are looking for a specific device, you may use the search bar at the top right, to search by any of the fields
- You can also use the sort arrows ⬍ at the top of each column to re-order the list

Viewing Device/Sensor Details

- When viewing a client's details (see 'Locating Client Information'), on the horizontal menu at the top of the client section, select 'Devices'
- The total number of devices that support the client are listed in the top left

Summary	Outcomes	Devices

5 Total Devices
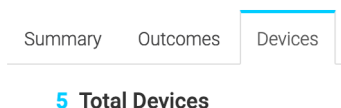
- By default, we show only active devices; if you would like to see 'former' or 'deactivated' devices as well, use the toggle at the top right

Show Deactivated Devices ⬭   -> **Hide Deactivated Devices** ⬮

- There is a card with a blue top, indicating the base unit (System Hub). Selecting this card will provide information about the system hub, rather than an individual device/sensor. (See 'Viewing System Hub/Base Unit Details')

Full Battery ▭

Hub-16-Device
System Hub

Last Activity: Hub-16-Device ⬤
offline 07/06/20   Offline
9:47:46 pm
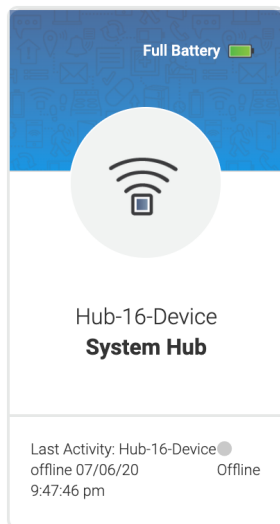
Each device supporting the client has its own card.

- Each card shows:
  - A battery level display at the top right
  - An icon, showing an image representing the device in the center
  - The name of the device, such as 'Front door' just below the icon
  - The most recent activity that occurred for that device, and when it occurred, at the bottom left
  - An indicator for whether the device is online or offline at the bottom right

- Each card can be selected, to view additional details about the device

Steve

Summary   Outcomes   Devices   Timeline   Reports

Back to Client Device List

Lamp Show Details

Device Activity

Export

Hub	Name	Status	Device Type	Activity
Lexie's Test System	Lamp	On	Light	Jul 06, 2020 8:29:54 PM
Lexie's Test System	Lamp	Off	Light	Jul 06, 2020 8:26:46 PM
Lexie's Test System	Lamp	On	Light	Jul 06, 2020 8:13:43 PM
Lexie's Test System	Lamp	On	Light	Jul 02, 2020 12:47:00 PM
Lexie's Test System	Lamp	On	Light	Jul 02, 2020 12:38:00 PM
Lexie's Test System	Lamp	On	Light	Jul 02, 2020 12:33:00 PM

- o The Device Activity section shows details of the history of events recorded for the device.
  - ▪ Each row lists the event details, including what occurred (Status) and when (Activity)

Lamp Hide Details

Created At	February 19, 2020 17:36:30
Hardware Type	Leviton Plug-In Dimmer
Client	Steve
Hub	Lexie's Test System
Z-wave Node ID	6
Device Type	Light

Edit

- By default, some standard information about the device is hidden
  - o Select 'Show details', and you can see
    - ▪ When the device was added
    - ▪ What type of hardware supports it
    - ▪ The name of the client it supports
    - ▪ The system hub it reports to
    - ▪ Some additional technical information

Viewing System Hub/Base Unit Details

- When viewing a client's details (see 'Locating Client Information'), on the horizontal menu at the top of the client section, select 'Devices'
- One of the cards available should have a blue top - This is the system Hub card - Click the card to open details

- Some basic information about the system hub will be available, including:
  - When it was added to our system
  - What client(s) it supports
  - When we most recently received information from the system hub
  - Whether it is connected to power
  - Whether the battery level is low or full
  - Whether the system hub is tampered or untampered
  - Whether the system hub is online or offline

- Additionally, there is a list of system alerts that have been sent to responders. System alerts are sent out when we detect a problem with the hub or a sensor (such as going offline, or having a low battery), or when we detect that a problem is resolved.

System Health
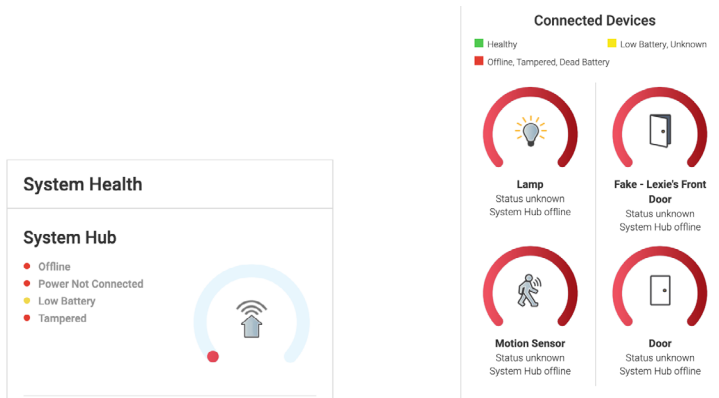
- When viewing a client summary page (see 'Locating Client Information'), at the the bottom right is a section on System Health
- That section is divided into two parts, *System Hub* and *Connected Devices*
- *System Hub* provides information about the status of the base unit
  - A semi-circular bar indicates how healthy the unit is; a full bar indicates full health, while a partial bar indicates a problem with your base unit
  - To the left of the semi-circular bar, there are four status indicators:
    - Online/offline
    - Power connected/not connected
    - Full battery/low battery
    - Untampered/tampered
  - *Note that, if the unit is offline or tampered, it will not function properly*
- *Connected Devices* provides information about the status of each sensor or device
  - A semi-circular bar indicates how healthy the unit is, a full bar indicates full health, while a partial bar indicates a problem with that particular sensor.
  - The status options affecting each device are the same as those affecting the base unit
  - Underneath each device's name, the last activity for each device and when it occurred is also listed

Understanding Client Timelines

- When viewing a client's details (see 'Locating Client Information'), on the horizontal menu at the top of the client section, select 'Timeline'
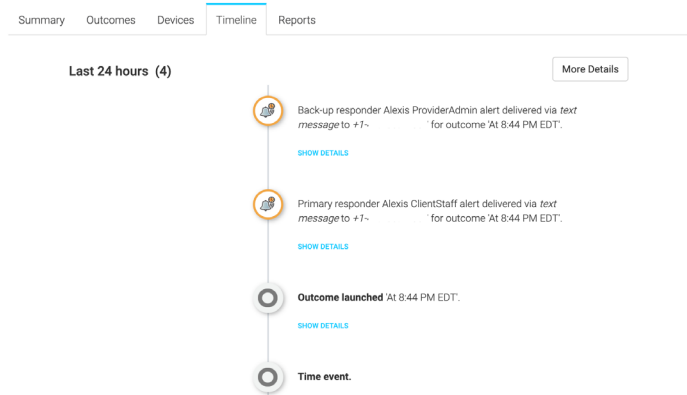
- The timeline will show the last 24 hours of activity for the client
- When you scroll to the bottom of the page, if there was earlier activity that day, 'Loading' will appear at the bottom of the screen, while we load more activity
- Once all activity that day has been displayed, 'No more activity available' will appear at the bottom of the screen.
- The timeline has an item for each activity that occurs, whether it is a door opening, a responder being notified, an alert being acknowledged, or an outcome being edited.
- To see when a specific activity occurred, hover over that activity, and the date and time will be shown to the left
- Some activities have additional information that is available; these have 'Show Details' in blue below
  - o A miniature timeline will appear, showing each related activity that occurred prior to the activity you are viewing (e.g. if a door opening caused an outcome to launch, and you view more details for the Outcome launched activity, you will see that the door opened, and the time and date it opened)
  - o For alert activities, you will also see the full outcome description
  - o For outcome edit activities, both the previous outcome description and the new outcome description will be displayed, with the changes in red.

Outcomes

Viewing Client Outcomes

- When viewing a client's details (see 'Locating Client Information'), on the horizontal menu at the top of the client section, select 'Outcomes'
- The Outcomes are sorted by the Alert Concern they are intended to address (e.g. Completing Daily Routines or Wandering and Elopement).
- You can also filter the Outcomes that are shown
  - o The filtering options are at the top right corner of the Outcome section
  - o We automatically show only those Outcomes which are active.

Active	All Concerns

  - o Use the dropdown menus to adjust the filters:
    - ▪ Show only inactive outcomes, show both active and inactive outcomes
    - ▪ Show only outcomes for any one alert concern

Turn the Lamp On
HIDE DETAILS

TRIGGER DETAILS   *Device: When Door is closed between 12:05 AM and 11:35 PM EDT*
Active on: Sunday, Monday, Tuesday, Wednesday, Thursday & Friday
created by: Alexis Frisch
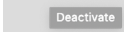
ACTION DETAILS   *Control Something*
💡 On Lamp

Edit

- Each Outcome has a brief description of what situations it covers
- Below each outcome is an option to 'Show Details'
  - o When selected, it will provide additional information about the Outcom-such as which days it is valid, who created it, and who is contacted when it occurs.
- From this view, there is an included blue button if an outcome needs to be edited

Deactivating an Existing Outcome

ClientStaff and ClientOwnAdmin users do not have access to this ability

- You may choose to deactivate an existing outcome when a client no longer needs supported by that outcome.
- Find the Outcome you'd like to deactivate (see 'Viewing Client Outcomes')
- To the right of that outcome, is a green toggle
- Clicking this toggle will deactivate the outcome
- You will be asked "Are you sure you want to deactivate this alert?"
- If you are sure, then select 'confirm'

- You should now be able to see the outcome in the inactive list (use the filter at the top right to see inactive Outcomes), with a white (rather than green) toggle.

Activating an Inactive Outcome

ClientStaff and ClientOwnAdmin users do not have access to this ability

- Find the inactive Outcome you'd like to activate (see 'Viewing Client Outcomes', and be sure to chose the filter to make 'inactive' outcomes visible.
- To the right of that outcome, is a white toggle
- Clicking this toggle will activate the outcome
- You will be asked "Are you sure you want to activate this alert?"
- If you are sure, then select 'confirm'
- You should now be able to see the alert in the active list (use the filter at the top right to see active Outcomes), with a green (rather than white) toggle.

Editing an Existing Outcome

ClientStaff and ClientOwnAdmin users do not have access to this ability

- *Important Notes:*
    - If you've attempted to create an outcome and are met with an 'identical trigger' error, you will be directed to edit an existing outcome, rather than creating a new one. The existing outcome in need of editing may be either currently active or inactive, so be sure to check both locations.
    - The triggers initially set for an outcome cannot be changed. If an outcome occurs "When the front door is open" and you'd like to change it to "When the back door is open" or "When the front door is closed", please instead deactivate the existing outcome, and create a new outcome.
- Find the Outcome you'd like to edit (see 'Viewing Client Outcomes')
- To the right of that outcome is a black 'edit' button
- Click this button to begin the editing process
- See 'Creating an Outcome' for further instruction

Creating an Outcome

ClientStaff and ClientOwnAdmin users cannot create Outcomes
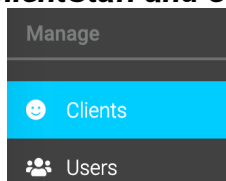
- Go to the Client section on the sidebar
- Find your client (using the Search bar as needed), and select them to open the Client Dashboard
- Select the Outcomes tab
- Select the red + at the bottom right
- Select an appropriate concern
    - Calling for Help
    - Completing Daily Routines
    - Cooking Safety
    - Falls and Inactivity

- o Limited Mobility
- o Medication Safety and Compliance
- o Sleep Patterns
- o Wandering and Elopement

① Trigger Select a trigger that will kick off the action(s).

☐ Device/Sensor Sensor activity throughout the home E.g. when a door opens
☐ Time of Day E.g. at 9 AM...

- Set up your Outcome Trigger
  - o Choose whether you would like a Device/Sensor or a Time of Day to trigger the Outcome, based on the needs/goals of the client
  - o See 'Setting up a Device/Sensor Outcome Trigger' or 'Setting up a Time of Day Outcome Trigger' for more details; whichever is relevant

② Action The trigger you have selected will result in one or more actions. Select the action(s) you would like to happen

+ Prompt Steve
Prompt daily living activities via voice announcement, email, or text message.

+

+ Alert Responder(s)
Send a real-time alert via email or text message

+

+ Control Something
ex: Turn light on or turn light off

- Set up your Outcome Actions
  - o You may include 1, 2, or 3 types of Outcome actions
    - ▪ See '**Set up Outcome Client Prompt Action**' for instructions on setting up a prompt directly to a client
    - ▪ See '**Set up Outcome Responder Alert Action**' for instructions on setting up responder alerts
    - ▪ See '**Set up Outcome Control Something Action**' for instructions on setting up control of certain devices based on the chosen trigger
  - o You may add multiple Outcome actions, as needed
  - o When all your Outcome Actions are set up, select 'Continue'

- Name your Outcome
  - **Important!** The name must be brief (25 characters or less).
- Review the Outcome details
- Save

Setting up Triggers

Device/Sensor Outcome Triggers

- When creating an outcome, you have an option for the Trigger for an alert to be a Device or Sensor - For this option, select 'Device/Sensor' in the Trigger section of creating an outcome

1 **Trigger** Select a trigger that will kick off the action(s).

☐ Device/Sensor Sensor activity throughout the home E.g. when a door opens
☐ Time of Day E.g. at 9 AM...

- Then, choose the device/sensor and appropriate action from the list that will cause the outcome to be launched if all conditions are met (e.g. when the door is opened)

Which device/sensor will trigger this event?

When the door is closed	When the fake - lexie's front door is closed	When the lamp is turned off
When the door is opened	When the fake - lexie's front door is opened	When the lamp is turned on
When the door is explode	When the fake - lexie's front door is explode	

- Once one is selected, use the dropdown menu to choose if that must remain true for a given amount of time
  - If you do not want the criteria to need to remain true for a certain amount of time, leave the default option 'immediately' selected

- o Selecting 'for more than 5 minutes' would, for example, mean that 'When the door is open' it must remain open (not be closed) for the next 5 minutes in order to trigger the outcome

Would you like to add an additional trigger condition?
E.g. 'When the front door is open AND the stove is on...

☑ Not at this time

- Choose whether you'd like an additional device/event pair to need to be true to trigger the outcome
  - o Note: You may only choose one additional device/event pair at this time
  - o This is not evaluated reciprocally: An outcome "When the door opens and the porch light is off' is **not** the same as "When the porch light is turned off and the door is open".
    - ▪ The first triggers when the door opens, and at that point checks to see if the porch light is off.
    - ▪ The second triggers when the porch light is turned off and checks to see if the door is open.
  - o If you do not want to select an additional device/event pair, you need to check the box beside 'Not at this time'.

START TIME:	9:00 AM	Add 5 minutes
END TIME:	6:00 PM	Add 5 minutes

☐ Select All

S	M	T	W	T	F	S

☐ Select All

- Choose what times you want the outcome to be valid on.
  - Select Start Time first.
    - Every hour and half hour is available.
    - If you'd like a smaller increment, select the time just prior to when you'd like the outcome to start, and use the 'Add 5 minutes' button until it is at the 5 minute mark you'd like to start on.
    - Increments smaller than 5 minutes are not currently available.
  - After selecting Start Time, select the End time
    - Every hour and half hour following the Start Time selected is available.
    - Times on the following day are available, to allow outcomes 'between 10pm and 5am on the following day' to be scheduled.
    - For smaller increments than 30 minutes, please select the time just prior to the time you'd like, and use the 'Add 5 minutes' button until the End time is at the 5 minute mark you'd like to end on.
    - Increments smaller than 5 minutes are not currently available.
  - Select which days of the week you want the Outcome to be valid on
    - Selected days are highlighted in blue
    - You may select a single day multiple days, or all days
    - If your time range spans days (e.g. 10pm to 5am the following day), the days selected are for the start time (e.g. 10pm to 5am the following day on Tuesdays would be valid from Tuesday at 10pm to Wednesday at 5am)
  - Select Continue to choose the Action and save the Outcome

Time of Day Outcome Triggers

- When creating an outcome, you have an option for the Trigger for an alert to be a Device or Sensor - For this option, select 'Device/Sensor' in the Trigger section of creating an outcome
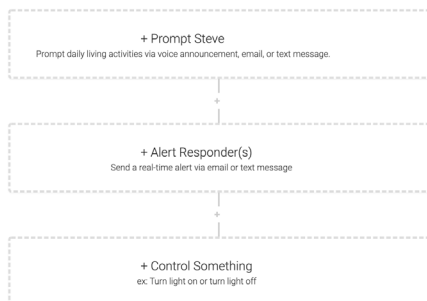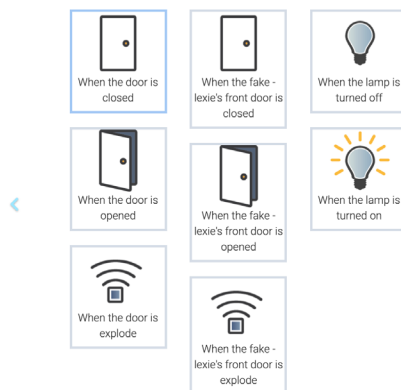
> **1** **Trigger**   Select a trigger that will kick off the action(s).
>
> ☐ **Device/Sensor** Sensor activity throughout the home E.g. when a door opens
> ☐ **Time of Day** E.g. at 9 AM...

- Click inside the box next to 'Start Time'
- Choose what time of day you would like the outcome to occur at, to the nearest minute, by using the ^ and v arrows to adjust the displayed time. Be sure to also adjust the AM/PM selection.
- Once the displayed time is correct, click outside the time selection box.
- Select what days of the week you would like the outcome to be valid on
  - Selected days are highlighted in blue
  - You may select a single day multiple days, or all days
- Select Continue

Setting up Actions

Prompt a Client

- Under 'Action' section of creating an outcome, Select + Prompt [Client name]
- Select either email, text, or both
- Enter a custom message to be sent (required)
- Decide whether the client needs to acknowledge the reminder
  - If acknowledgement is required, select how long the client has to acknowledge the reminder
  - Then select the backup responder you'd like to receive a message if the client does not acknowledge the message
  - One of the available backup options can include the client him/herself
  - Select either email, text, or both for the backup responder's message
- Save Reminder Responders and add additional actions or click 'Continue'

Alert a Responder

- Under 'Action' section of creating an outcome, Select + Alert Responder(s)
- Select which member of the client's support team should receive the alert; more than one may be selected
- Select email, text, or both
- Optionally, enter a custom message to be sent with the normal alert
  - This might be a reminder to the staff or responder which action needs to take place (ex. "Give Steve a call")
- Decide whether a primary responder needs to acknowledge the alert
  - If acknowledgement is required, select how long the client has to acknowledge the alert before escalating the alert to a backup responder
  - Then, select who you would like to receive a message if a primary responder does not acknowledge the message within the specified time-frame. More than one backup responder may be selected.
  - One of the available backup options can include the client him/herself
  - Select email, text or both for the backup responder's message
- Save Alert Responder(s) and add additional actions or click 'Continue'

Control Something

- Outcomes can be designed to control another device, as needed
  - (ex. "Turn the bedroom light off when no motion is detected for more than 10 minutes" or "At 10pm, turn the bedroom light off.")
- Under 'Action' section of creating an outcome, Select + Control Something
- Select the device you would like to control
- Select what you would like that device to do
- Select 'Save'
- Select Save Device State and add additional actions or click 'Continue'
- *Note:* When an outcome is set up to control something, the user who created the outcome will be sent an email notification when the outcome has been successfully saved or has failed saving to the system hub.

Alerts and Acknowledgements

Updating System Alert Recipients and Acknowledgements

Go to a system hub's details (see 'Viewing System Hub/Base Unit Details')

> System Hubs
> Beacons
> Client Subscriptions
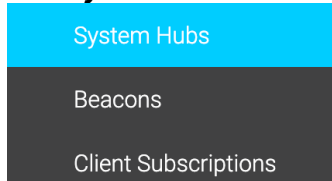
- Select "System Hubs" in the lefthand menu, and search for and select the system hub

> **Current Status = System Hub Offline**
> - If the System hub is offline, it could be unplugged or lack internet access. Someone will need to be onsite to reconnect the system. Open a help ticket to get started: help@simply-home.com
>
> ⬆ Edit System Trouble Alerts
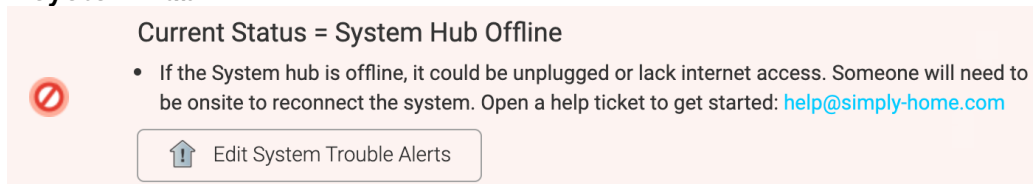
- There should be a banner at the top, indicating whether the system hub is online or offline
- Inside that banner is a button 'Edit System Trouble Alerts'
- Select that button
- This should take you to a page "Configure System Alerts", with seven gray sections, each for a different alert type
- Each of these sections has a black edit icon at its far right. ✏
- To edit any one system alert:
  - Select the edit button for the relevant alert
  - Remove any user you would like to remove by selecting the blue 'Remove' button next to their name. **✕ REMOVE**
  - If you want to change whether a user receives email or text messages, remove the user, then add them back
  - Add any user you would like to add by selecting the gray 'Add' button next to their name, and then selecting the type of message you'd like them to receive. **+ ADD**

Does a Primary Responder Need to Acknowledge the Alert? ❓

☑ Yes
☐ No

How Long Does The Primary Have to Respond?

[Select A Time ⌄]

- o **If you would like to add the requirement for the alert to be acknowledged, select 'Yes' to the question "Does a Primary Responder Need to Acknowledge the Alert?"**
  - ▪ **Then select a time frame from the dropdown menu for how long the primary responder has to acknowledge the alert.**
  - ▪ **Select which responder(s) will be the backup responders, who receive alerts when the primary responders haven't been able to acknowledge their alert**
- o **If you do not want to have the alerts acknowledged, select 'No' to the question "Does a Primary Responder Need to Acknowledge the Alert?"**
- o **Select 'Save' to confirm choices for that single alert**

☐ Apply primary responder selections to all system alerts

- **When editing a single alert, you have the option to apply the changes made to all of the system alerts.**
  - o **To do this, select the check box next to that option**
  - o **Select 'Yes' when asked to confirm**
- **When all alerts that you wish to edit have been adjusted, select the blue 'Continue' button at the bottom of the screen, below the seven gray sections.**
- **Another screen, with the details of what you have selected, will appear**
- **Review those details**
- **If accurate, select 'Save Changes' at the bottom**
- **Otherwise, you can 'Cancel' _all_ your changes at the bottom, or use the 'Edit' button next to Assign Responders toward the top to return to editing.**

Acknowledging Alerts

- Not all alerts require acknowledgement; if you receive an alert (whether by text or by email) that does not include a link, then that alert does not need to be (and cannot be) acknowledged.
- Any member of a client's support team can acknowledge an alert for that client.
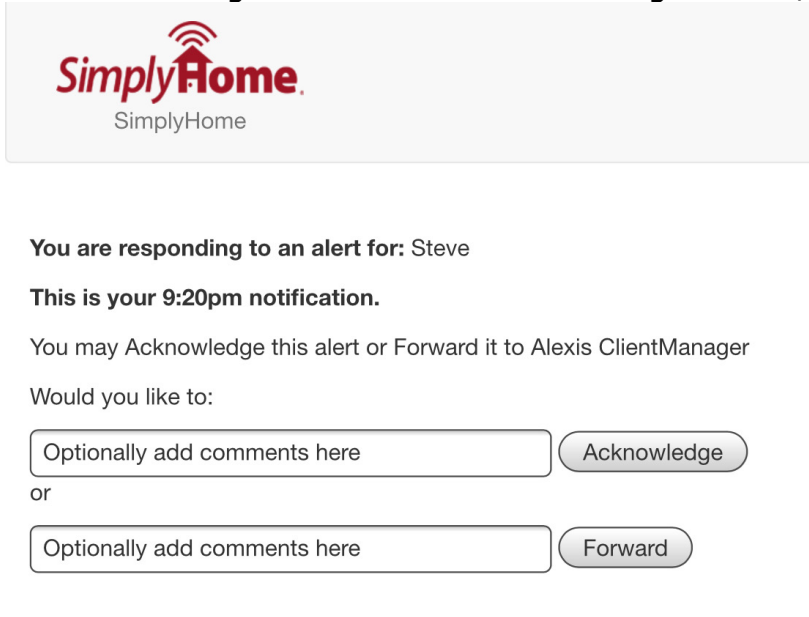
There are several ways to acknowledge an alert:

In the Mobile App

- Once you have installed the SimplyHome Responder app, open it on your mobile device
- Log in with the same email and password you use to log into the portal
- You should see a list of all clients you support
- Select the client whose alert you'd like to acknowledge
- Select 'All Pending Alerts'
- You should see a list of all alerts for this client which currently need to be acknowledged
  - You may view details for each alert by selecting it.
  - On the detail screen, there is a red 'Acknowledge' button
- Or, if you simply wish to go ahead and acknowledge it without viewing details, you may select the gray 'Acknowledge' item below the initial information about that alert
- Once you have selected either the gray 'Acknowledge' text on the alert listing, or the red acknowledge button on the alert details page, you should see an 'Acknowledge' popup
- Optionally enter any comments that may be needed
- Then, select 'Acknowledge Now'
- You should return to your client's page, and that client should have a green face, unless there are other items affecting his/her status
- Note, if you return to the general client listing, you will need to refresh the page (by dragging your finger downward from the top of the screen), before your client's status will change on that page.
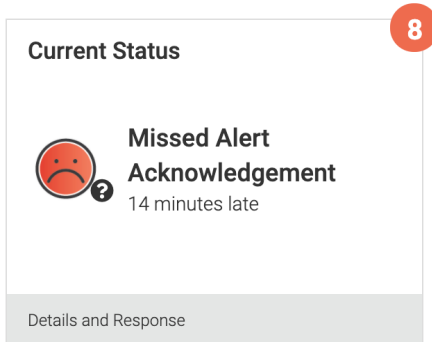
By Email or Text

- If you have received an alert by email or text, if that alert can be acknowledged, it will contain a link, which will direct you to a page allowing you to either acknowledge or forward the alert. There will also be instructions to reply with an acknowledgement code instead of through the link, if desired.

You are responding to an alert for: Steve

This is your 9:20pm notification.

You may Acknowledge this alert or Forward it to Alexis ClientManager

Would you like to:

| Optionally add comments here | (Acknowledge) |

or

| Optionally add comments here | (Forward) |
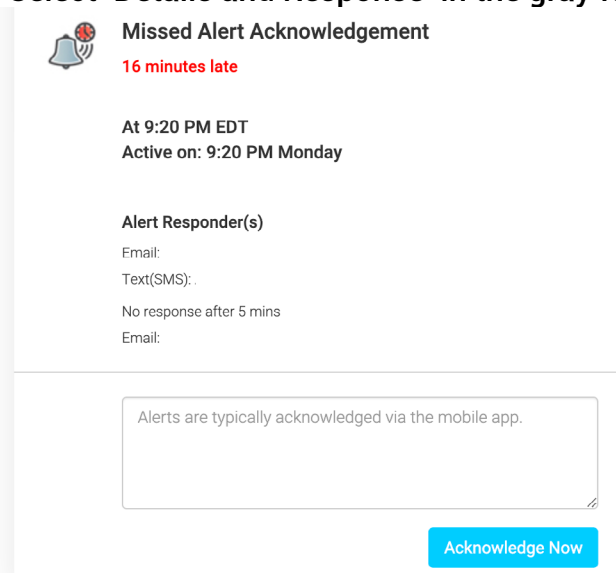
- Once you are on the Alert Response page, if you'd like to acknowledge the alert, optionally add your comments to the acknowledgement box, then click 'Acknowledge'.
- You should see a message saying 'You have successfully acknowledged the alert.'

On the Client Status Section of the Client Summary Page

- When you are viewing a client's status, and see that it is not 'green', if the client status activity card indicates that there is a pending or missed alert acknowledgement, you can resolve the matter there.
- Select 'Details and Response' in the gray footer for the Current Status card.

- You should see a popup with additional details of the pending or missed alert acknowledgement
- Review the information. If, given the information, you would like to acknowledge the alert, optionally enter any comments in the box.
- Select the blue 'Acknowledge Now' button
- If there are more items affecting the client's status, you will be taken to the next item. Otherwise, you will see a message indicating 'All activities requiring immediate attention have been resolved'.

On the Client's Timeline

- When you are viewing a client's timeline, there are a variety of activities that can be seen; one such activity is an alert. The item will indicate that either a Back-up responder or a primary responder has been alerted
- Click on 'Show Details' to see more information
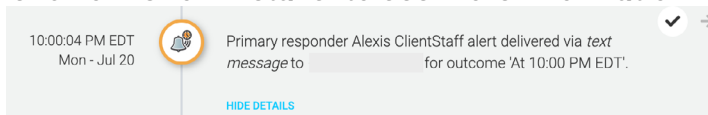
- If the alert can be acknowledged (some Outcomes do not require/allow acknowledgement), you will see a check-mark at the top right
- Select the check-mark to begin acknowledgement

- A popup should appear with either Pending Alert Acknowledgement or Missed Alert Acknowledgement as the title
- Enter a comment in the box (required)
- Select the blue Acknowledge Now button
- If the alert is acknowledged successfully, you should return to the timeline
- Once the page is refreshed, you should see a new item on the timeline indicating the alert was acknowledged.

Forwarding Alerts

- When an alert is forwarded, the alert is sent to the backup responders, just as it would be if the time frame for acknowledgement had passed. This means that the client's status as displayed in the portal will change from yellow to red, because the primary responder was not able to respond to the alert.
- Not all alerts can be forwarded; if you receive an alert, whether by text or by email, without a link, then that alert cannot be forwarded.

There are several ways to forward an alert:
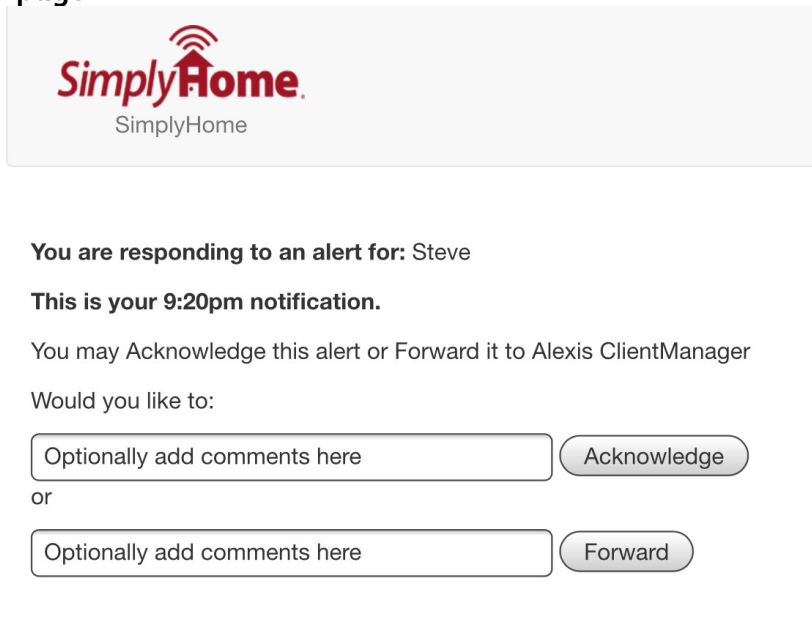
In the Mobile App

- Once you have installed the SimplyHome Responder app, open it on your mobile device
- Log in with the same email and password you use to log into the portal
- You should see a list of all clients you support
- Select the client whose alert you'd like to forward
- Select 'All Pending Alerts'
- You should see a list of all alerts for this client which currently need to be acknowledged.
- Only those alerts which have not already been sent to backup responders can be forwarded.
- You may view details for each alert by selecting it. On the detail screen, there is a red 'Acknowledge' button
- Or, if you simply wish to go ahead and acknowledge it without viewing details, you may select the gray 'Acknowledge' item below the initial information about that alert
- Once you have selected either the gray 'Acknowledge' text on the alert listing, or the red acknowledge button on the alert details page, you should see an 'Acknowledge' popup
- Optionally enter any comments.
- Then select 'Acknowledge Now'
- You should return to your client's page, and that client should have a green face, unless there are other items affecting his/her status

- Note that, if you return to the general client listing, you will need to refresh the page (by dragging your finger downward from the top of the screen), before your client's status will change on that page.

By Email or Text

- If you have received an alert by email or text, if that alert can be forwarded, it will contain a link, which will direct you to a page allowing you to either acknowledge or forward the alert. Click the link to open the alert response page.

Simply Home.
SimplyHome

You are responding to an alert for: Steve

This is your 9:20pm notification.

You may Acknowledge this alert or Forward it to Alexis ClientManager

Would you like to:

| Optionally add comments here | (Acknowledge) |

or

| Optionally add comments here | (Forward) |

- Once you are on the Alert Response page, if you'd like to forward the alert, optionally add your comments to the forwarding box, then click 'Forward'.
- You should see a message saying 'You have successfully forwarded the alert.'

On the Client Status section of the Client Summary page

Current Status ⑧

🙁❓ **Missed Alert Acknowledgement**
14 minutes late

Details and Response

- When you are viewing a client's status and see it is not 'green', if the client status activity card indicates that there is a pending alert acknowledgement, you can resolve the matter there.
  - Note that missed alert acknowledgements have already been sent to the backup responders, and so cannot be forwarded.
- Select 'Details and Response' in the gray footer for the Current Status card.

‹ ›

🔔🏀 **Pending Alert Acknowledgement**
11 minutes remaining before escalated

At 10:00 PM EDT
Active on: 10:00 PM Monday

Alert Responder(s)
Email: alexis.frisch+clientstaff@simply-home.com
Text(SMS): Alexis ClientStaff +1-4193091531

No response after 15 mins ← Forward Now
Email: alexis.frisch+clientmanager@simply-home.com

Alerts are typically acknowledged via the mobile app.

Acknowledge Now

- You should see a popup with additional details of the pending or missed alert acknowledgement
- Review the information. If, given the information, you would like to forward the alert, select the red Forward Now text.

Forwarding alert to:

✉ Backup responder via Email

    A comment is required in order to forward this alert to
    back-up responders

    Forward

- The card should flip, showing a new card with details of who the alert will be forwarded to.
- Enter the reason for forwarding the alert in the box (a comment is required here)
- Select the blue 'Forward' button
- If there are more items affecting the client's status, you will be taken to the next item. Otherwise, you will see a message indicating that 'All activities requiring immediate attention have been resolved.'
- Note that, shortly after forwarding the alert, you can expect to see a red card with the message 'Forwarded Alert Acknowledgement'

On the Client's Timeline

- When you are viewing a client's timeline, there are a variety of activities that can be seen; one such activity is an alert. The item will indicate that either a Back-up responder or a primary responder has been alerted. If a back-up responder has been alerted, the alert can no longer be forwarded, so the ability to forward alerts is only relevant for items on the timeline indicating that a Primary responder has been alerted
- Click on 'Show Details' to see more information

| 10:00:04 PM EDT
Mon - Jul 20 | 🔔 | Primary responder Alexis ClientStaff alert delivered via *text message* to   for outcome 'At 10:00 PM EDT'. | ✓ → |

- If the alert can be forwarded (some Outcomes do not require/allow forwarding), you will see an arrow pointing right at the top right

- Select the arrow to begin the forwarding process

✕

🔔 **Forwarding alert to:**

✉ Backup responder via Email

A comment is required in order to forward this alert to back-up responders

Forward

- A popup should appear with "Forwarding alert to" as the title
- Enter a comment in the box (required)
- Select the blue Forward button
- If the alert is forwarded successfully, you should return to the timeline
- Once the page is refreshed, you should see a new item on the timeline indicating that backup responders have been alerted.

Reports

- There are two different Reports sections, but they are very similar. One shows the report information for a single client, the other for all of the clients the logged-in user supports.
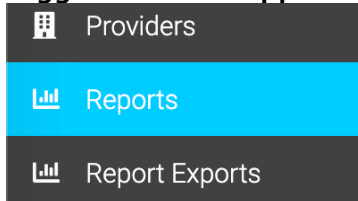
- To reach the general reports section, go to the 'Reports' section found on the left side-bar

- To reach the client-specific reports section, from your client's detail page, on the horizontal menu at the top of the client section, select 'Reports'
- There are four sections of the reports page: Outcome Activity, Alert Activity, Device Activity, and Check-in Activity.
- Please see the individual help sections on understanding each type of report

Outcome Activity Report

- There is a line item for each type of activity pertaining to an outcome.
  This includes the following:
  - An outcome being created
  - An outcome being edited
  - An outcome being activated
  - An outcome being deactivated
  - An outcome being launched
  - A responder being alerted
  - An alert being acknowledged
- The rows for each item include the date, the time, and the activity summary.
- For all items except outcomes being launched and alerts being acknowledged, the column 'Actor', with the name of the user who created, edited, activated, or deactivated an outcome, or acknowledged an alert
- For the general Report, an additional column 'client' is present
- Each activity summary has a 'show details' link in blue; this will show the full description of the outcome

Alert Activity Report

- There is a line item for each type of activity pertaining to an alert. This includes the following:
  - A responder being alerted
  - An alert being acknowledged
- The rows for each item include the date, the time, and the activity summary.
- For the general Report, an additional column 'client' is present
- Each activity summary has a 'show details' link in blue; this will show the full description of the outcome.

Device Activity Report

- There is a line item for each type of activity pertaining to a device. This includes the following:
  - A device reporting an event
  - An outcome being launched
- The rows for each item include the date, the time, and the activity summary.
- For the general Report, an additional column 'client' is present

Checkin-Activity Report

- There is a line item for each type of activity pertaining to a checkin. This includes the following:
  - A check-in preference being created
  - A check-in preference being edited (includes activation/deactivation)
  - An upcoming check-in alert being sent
  - A late check-in alert being sent
- The rows for each item include the date, the time, the activity type, the activity details, the check-in time, any comments.
- For the general Report, an additional column 'client' is present
- Each item in the Activity column has an option to 'show details', which shows the full description of the check-in preference and its current status

Firefly Portal Dictionary

Alert
A scheduled email or text prompt based on identified routines of daily living

Beacon
Small, wireless devices that communicate with smartphones/tablets as part of the Check-in Service to ensure the user checking on a client is present at the set location

Check-in Service / Responder App
A *Simply*Home service to streamline client supports from any mobile device, optimize schedules, assign tasks to staff, and document visits with time and location-stamped check-ins

Client
An individual empowered through the use of a *Simply*Home system

Client Reminders
Notifications sent to a client him/herself via text or email

Concern
An area of interest technology may support to greater enable a client's independence

Device
A sensor or automation product) used to empower a client

Device Connected
A device is communicating as intended to the hub

Device Event
Action reported by a device connected to the hub (a door sensor opening or closing)

Device Inactive
A device has been manually selected to no longer report activity to the hub (due to removal from location or otherwise)

Outcome
The rules and goals set to support a client (ex: send a text to Caregiver A when the front door opens between 6pm-8am)

Outcome Action
A real-time text or email prompt to a client, alert to a caregiver and/or control of a smart home device based on a scheduled trigger

Outcome Event
A record of activity based on scheduled outcome triggers and resulting actions

Outcome Trigger
Device/sensor activity, voice command, or a specific time of day that will kick off an action

Program
An individual location or program supported by technology; subsets of provider clients

Provider
An organization that manages/provides care for programs or clients supported by technology

Report
Organized information based on outcomes, alerts, devices and/or check-in activity

System Hub
The 'brains' of the SimplyHome system. This box communicates with the internet, connected sensors/devices and secure servers to store and send information as needed

System Hub Status -
The current health of the SimplyHome system hub box; (ex: internet connectivity, battery backup life, etc.)

Tampered Status
An offline sensor reporting tamper activity (removal of lid, etc.)

Timeline
A detailed time-based representation of all device/system activity, regardless of its connection to triggering an outcome

User
Any individual with portal access. This can include SimplyHome staff, a client's support team, and sometimes the client him/herself if he/she is receiving prompts.

User Roles

Provider Administrator
Provider Administrators have access to all clients assigned to their own provider detail with ability to edit information and outcomes as needed. This role can create and edit Client Manager and Client Staff users.

This role is typically assigned to high-level management or supervising managers of direct supports.

Client Manager
Client Managers have access to client data where they are listed as a part of the support team. This role can edit and create outcomes and acknowledge or forward alerts as necessary for clients they are assigned.

This role is typically assigned to a program manager or other similar role.

Client Staff
Client Staff have access to client data where they are listed as part of the support team. This role can acknowledge or forward alerts as necessary for clients they are assigned.

This role is typically assigned to direct support professionals without a management role.

Client Own Admin
Client Own Admin roles have access to view their own data and the ability to acknowledge and forward alerts for reminders.

This role is typically assigned to clients set to receive reminders, such as text alerts.

Package Types

Outcomes Package The connected client is only set up to schedule outcomes and receive alerts based on those outcomes

All Features Package The connected client is set up to schedule outcomes/alerts as well as check-in information

Check-In Package
The connected client is only scheduled to receive supported check-in information

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