



**User Manual \* Version 2 \* Updated April 2016**

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# DASHBOARD

# Dashboard

The *Pencil Me In Now* Dashboard allows you to set appointments for patients as well as provide an overview of the schedule. On this Dashboard Screen, you will notice the options available to you.

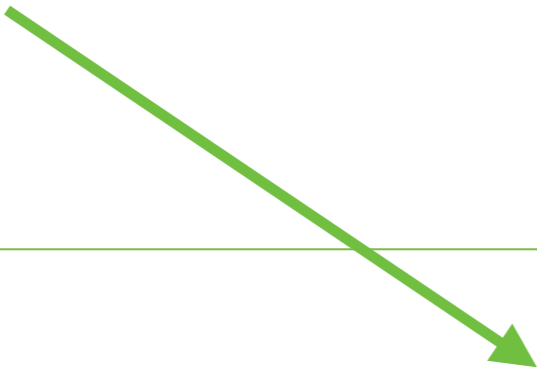
## Overview of *Pencil Me In Now*:

The screenshot shows the Pencil Me In Now dashboard interface. At the top left is the logo and website URL. Navigation buttons include Dashboard, Patient List, Reports, Settings, and Logout. A 'Work Queue (1)' section contains a 'Patient Search' input field with 'Submit' and 'Clear' buttons. Below this is a 'My Default' section with dropdown menus for 'Test Site' (set to 'Ashlyn Tyson (tester)') and 'Enter Zipcode', each with 'Submit' and 'Clear' buttons. A 'Navigator' bar shows 'Site : Test Site' and 'Navigator : Ashlyn Tyson (tester)'. A legend identifies appointment statuses: Cancelled by client (purple), Kept - Assisted (green), Kept - Enrolled (dark green), Kept - Submitted (light green), Missed (red), and Pending (blue). The main calendar is for November 2015, with tabs for 'month', 'week', and 'day'. The calendar grid shows dates from 2 to 5. On Monday, Nov 2, there is a red 'Missed' appointment for '9a Ashlyn Tyson 912-544-045'. On Wednesday, Nov 4, there is a yellow 'Kept - Enrolled' appointment for the same patient. On Thursday, Nov 11, there is a blue 'Pending' appointment for the same patient.

# Work Queue

If a patient sends a request via the healthcare center’s website, that inquiry is sent to a *Pencil Me In Now* administrator who will then assign the inquiry to a navigator. That inquiry will be displayed here (in the Work Queue) with the patient contact information so you can reach out to schedule an appointment. The Work Queue may not be displayed if there are no inquiries pending for you.

Location of the Work Queue:



Pencil Me In Now  
www.pencilmeinow.com

Dashboard Patient List Reports Settings Logout

Work Queue (1) Patient Search Submit Clear

Test Site My Default Ashlyn Tyson (tester) Submit Clear Enter Zipcode Submit Clear

Site : Test Site Navigator : Ashlyn Tyson (tester)

*You will be able to search other sites and navigator’s calendars to view availability. If you need to schedule a patient for another navigator, you can select their site to view when they have time available for an appointment.*

## Making Appointments

The calendar is color-coded so you will know the status of every appointment that is booked. Each color represents a different status. All appointments made in the future will be dark blue. Any missed appointments will be red. The appointments canceled by the client will be purple. Kept appointments can have three different status: Kept - Assisted, Kept - Submitted, and Kept - Enrolled. Each Kept status will be represented in a different shade of green.

### Overview of the Color Code Key:

**Pencil Me In Now**  
www.pencilmeinow.com

Dashboard Patient List Reports Settings Logout

Work Queue (1) Patient Search Submit Clear

Test Site Ashlyn Tyson (tester) Submit Clear Enter Zipcode Submit Clear

My Default

Site : Test Site Navigator : Ashlyn Tyson (tester)

Cancelled by client Kept - Assisted Kept - Enrolled Kept - Submitted Missed Pending

< > today November 2015 month week day

Mon	Tue	Wed	Thu	Fri	Sat
2 9a Ashlyn Tyson 912-544-0450	3	4	5	6	7
9	10	11 9a Ashlyn Tyson 912-544-0450	12	13	14

- **Dark Blue:** future appointments
- **Red:** missed appointments
- **Purple:** appointments canceled by the client
- **Greens:** kept appointments (three versions: assisted, submitted, and enrolled)

## Making Appointments

- Double-click on the day you wish to make an appointment.
- Enter Appointment Details in the pop-up window.
- Select appointment notifications (sent via text or email).

*When you are adding the appointment time, please add the Start Time in a format such as, 09:00 AM. The End Time will automatically populate to 15 minutes. You can override this populated time if extra time is needed.*

### Overview of the Enter Appointment Details Window:

Enter Appointment Details

First Name\* :

Last Name\* :

Email\* :

Phone No\* :

Site : Select Site ▼

Navigator\* : Select Navigator ▼

Start Time\* : HH:MM AM ▼

End Time\* : HH:MM AM ▼

Notification :  Text  Email

Submit

*All fields for this appointment must be completed in order to successfully submit the appointment. If you do not know the patient's phone number and email address, please enter your own to satisfy these requirements.*

*You can change this information later if needed.*

# Making Appointments

After the appointment has been entered, navigate to the calendar where you will see the appointment displayed. You can enter an appointment for any time in the future, but you only will be allowed to enter an appointment up to seven days in the past.

In addition to the default month view, you can view the calendar in a week or day view as well.

To view information about a currently scheduled appointment, roll the mouse over the appointment or for additional details double-click the appointment.

## Overview of the Week View:

The screenshot shows the Pencil Me In Now interface in week view for the dates Nov 2 - 7, 2015. The top navigation bar includes 'Dashboard', 'Patient List', 'Reports', 'Settings', and 'Logout'. Below this is a 'Work Queue (1)' section with a 'Patient Search' field and 'Submit' and 'Clear' buttons. The main interface shows a calendar grid with columns for 'Mon 11/2', 'Tue 11/3', 'Wed 11/4', 'Thu 11/5', 'Fri 11/6', and 'Sat 11/7'. A legend indicates appointment statuses: 'Cancelled by client' (purple), 'Kept - Assisted' (green), 'Kept - Enrolled' (dark green), 'Kept - Submitted' (light green), 'Missed' (red), and 'Pending' (blue). A red appointment for 'Ashlyn Tyson' is shown on Monday at 9:00 AM - 9:15 AM. A grey block on Wednesday from 7:00 AM to 10:00 PM is labeled 'Not Available'. Navigation buttons for 'today', 'month', 'week', and 'day' are visible.

## Overview of the Day View:

The screenshot shows the Pencil Me In Now interface in day view for Monday, November 2, 2015. The top navigation bar and 'Work Queue (1)' section are identical to the week view. The main interface shows a vertical timeline for the day. A red appointment for 'Ashlyn Tyson' is shown from 9:00 AM to 9:15 AM. Navigation buttons for 'today', 'month', 'week', and 'day' are visible.



# PATIENT LIST

## Patient List

The Patient List shows the patients that you have entered into the system. Here you have the option to search a patient by name, add a new patient, edit patient details, delete a patient, add an appointment for an existing patient, or export the patient details to Excel if needed.

### Overview of the Patient List:

The screenshot shows the 'Patient List' page of the Pencil Me In Now system. At the top left is the logo for 'Pencil Me In Now' with the website URL 'www.pencilmeinow.com'. To the right of the logo are navigation buttons: 'Dashboard', 'Patient List' (highlighted in blue), 'Reports', 'Settings', and 'Logout'. Below the navigation is a search bar labeled 'Patient Search' with 'Filter' and 'Clear' buttons. To the right of the search bar are 'Add New Patient' and an Excel export icon. The main content is a table with the following data:

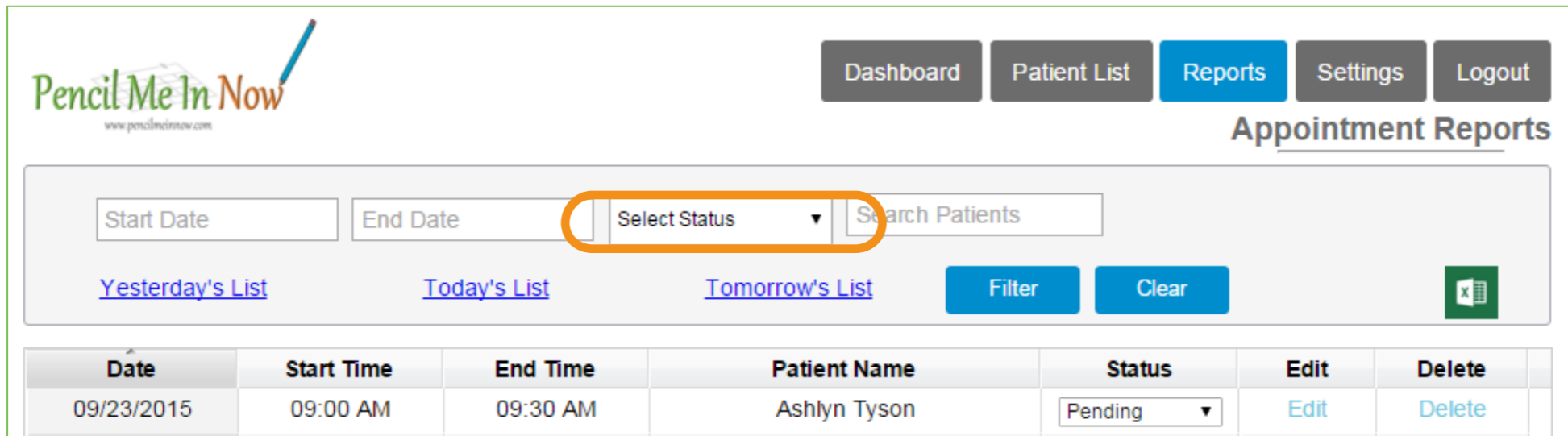
Patient Name	Email	Phone No	Edit	Delete	Add New
Steve Smith	ssmith@email.com	912-544-0450	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Add Appointment</a>
Laurel Sapp	lsapp@pmin.com	912-544-0450	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Add Appointment</a>
Ashlyn Tyson	ayson@ctgconnect.com	912-544-0450	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Add Appointment</a>

# REPORTS

## Appointment Reports

The Report tab is very beneficial for data review. You can set the status of the appointments for the patients as needed. Also, you can sort or view the appointments for yesterday, today, or tomorrow. An Excel export is available here as well.

### Overview of the Appointment Reports:




**Pencil Me In Now**  
www.pencilmeginow.com

Dashboard Patient List **Reports** Settings Logout

**Appointment Reports**

Start Date End Date **Select Status** Search Patients

[Yesterday's List](#) [Today's List](#) [Tomorrow's List](#) Filter Clear 

Date	Start Time	End Time	Patient Name	Status	Edit	Delete
09/23/2015	09:00 AM	09:30 AM	Ashlyn Tyson	Pending	<a href="#">Edit</a>	<a href="#">Delete</a>

## Changing a Status

To update the status of a patient, simply select the drop-down field that is seen in the status column. Any status that is set to Kept-Assisted, Kept-Submitted, and Kept-Enrolled will prompt you to complete the Client Enrollment Data form.

(See circled above in orange)

# Client Enrollment Data Form

The Client Enrollment Data form allows you to capture some demographic details about the patient’s lifestyle and insurance plan. The fields are not required but please complete as many as possible. This information will be used in future reports. To report from this data, refer to the Client Enrollment Data Report on Page 17 of this manual.

## Overview of the Client Enrollment Data Form:

**Client Enrollment Data** ✕

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**General Information**

Date : <input type="text"/>	Zip code: <input type="text"/>	County: <input type="text" value="Select County"/>	Age: <input type="text" value="Select Age"/>	Race: <input type="text" value="Select Race"/>	Smoke: <input type="radio"/> Yes <input type="radio"/> No	Type of Appt: <input type="text"/>
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**Application Status**

Assist: <input type="radio"/> Yes <input type="radio"/> No	Education only (No enrollment) <input type="radio"/> Yes <input type="radio"/> No	Enroll: <input type="radio"/> Yes <input type="radio"/> No	Enrolled in SHOP: <input type="radio"/> Yes <input type="radio"/> No	Assisted with general inquiries about health coverage?: <input type="radio"/> Yes <input type="radio"/> No
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**Household**

Total: <input type="text"/>	Medicaid: <input type="radio"/> Yes <input type="radio"/> No	PeachCare: <input type="radio"/> Yes <input type="radio"/> No	Assisted with Taxes: <input type="radio"/> Yes <input type="radio"/> No	Medicare : <input type="radio"/> Yes <input type="radio"/> No	Not Apply : <input type="radio"/> Yes <input type="radio"/> No	Assisted with Filing Exemptions: <input type="radio"/> Yes <input type="radio"/> No
Referrals to : <input type="radio"/> Medicaid/CHIP <input type="radio"/> Agents/brokers for SHOP assistance		Other : <input type="text"/>	Post enrollment services : <input type="radio"/> Yes <input type="radio"/> No	Does this consumer fall in the coverage gap?: <input type="radio"/> Yes <input type="radio"/> No		

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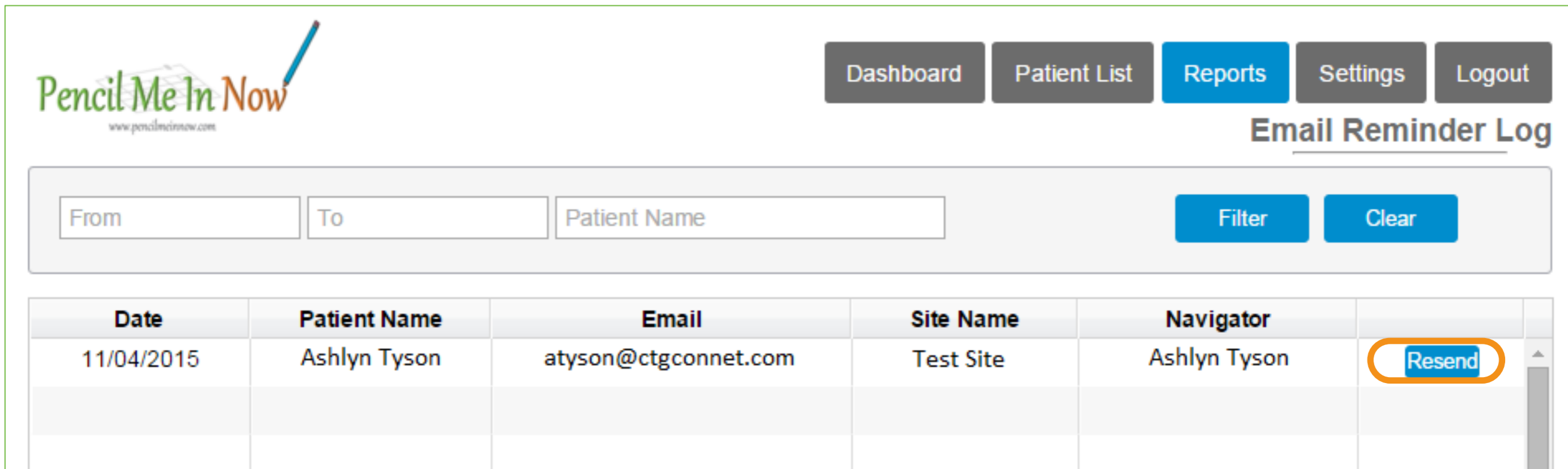
**Health Insurance Plan**

Metal Level : <input type="text"/>	Company : <input type="text" value="Select Company"/>	Plan Cost : <input type="text"/>	APTC : <input type="text"/>	Premium : <input type="text"/>	Notes : <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>
How did you hear about us? : <input type="text" value="Select Referral"/>					

## Email Reminder Log

The Email Reminder Log is a history of the email notifications that were sent to the patients/navigators. If you need to resend a notification, that can be done here (see below circled in orange).

### Overview of the Email Reminder Log:



The screenshot shows the 'Email Reminder Log' interface. At the top left is the 'Pencil Me In Now' logo with the website URL 'www.pencilmeinnow.com'. To the right are navigation buttons: 'Dashboard', 'Patient List', 'Reports' (highlighted in blue), 'Settings', and 'Logout'. Below these is the title 'Email Reminder Log'. A search bar contains three input fields: 'From', 'To', and 'Patient Name', followed by 'Filter' and 'Clear' buttons. Below the search bar is a table with the following data:

Date	Patient Name	Email	Site Name	Navigator	
11/04/2015	Ashlyn Tyson	atyson@ctgconnet.com	Test Site	Ashlyn Tyson	<a href="#">Resend</a>

# Outreach Education

This report allows you to download the template and add information about the event(s) in which you will be participating. To download the template, choose the “Download Template” button on the right of the screen.

**Outreach Education**

Choose File No file chosen Upload Clear Download Template

From To Filter Clear ?

Navigator	Document	Created On	Download	Delete
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*For any additional information on this report, select the question mark icon for a detailed description of the data that is to be entered on the Outreach Education Report.*

## Overview of the Outreach Education Report details:

Clear Download Template

Filter Clear ?

**Outreach Education**

- Assisters will enter event name, sponsor/partner, event description, and location in the spreadsheet.
- The number of consumers targeted refers to the number of consumers expected to be reached during a given event. The Assister organization should consider how to reach the population and estimate realistically how many consumers they might be able to reach through their outreach/enrollment, education, and/or marketing/promotion events.
- For the number of Marketplace applications started, the Assister should account for any applications started during any one of the events. If there are not any Marketplace applications started, then the Assister should enter "0."
- In addition to the defined categories, the type of population-based event is prepopulated and Assisters may choose from the following categories: faith, women, youth, African American, American Indian/Alaska Native, Latino, Asian American/Pacific Islander, and lesbian/gay/bisexual/transgender.

# Outreach Education

## Overview of the Outreach Education Report:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	
1													Population-Based Activity										
2	Date	Type (Outreach, Education, or Marketing)	Event Name	Sponsor/Partner	Event Description	Location Name	Street Address	City	State	Zip Code	Number of Consumers Targeted	Number of Marketplace Applications Started	Faith based	Women	Youth	AFR AM	AI/AN	Latino/ Hispanic	AA/PI	LGBT	POC Name	POC Phone	
3																							
4																							
5																							
6																							
7																							

Upon completion of the report, you have the ability to securely upload a copy of the report into **Pencil Me In Now** for safekeeping.

**Note:** Only the author of the report has access to this information.



# Client Enrollment Data

The Client Enrollment Data that was previously recorded on the Appointment Report will populate on this report without any patient specific details to include: name, phone number, and email address. Only the demographic information that was collected will display here to allow for easy reporting.

The screenshot shows the Pencil Me In Now web application interface. At the top left is the logo with the text "Pencil Me In Now" and the URL "www.pencilmeinow.com". To the right of the logo is a navigation menu with buttons for "Dashboard", "Patient List", "Reports" (which is highlighted in blue), "Settings", and "Logout". Below the navigation menu, the page title "Client Enrollment Data" is displayed. Underneath the title is a filter bar containing four input fields: "Start Date", "End Date", "Select a Site" (a dropdown menu), and "Select a Navigator" (a dropdown menu). To the right of these fields are two buttons: "Filter" and "Clear". Below the filter bar is a table with the following headers: "Enrollment Date", "Zip Code", "Counties", "Age", "Race", "Smoke", "Type of App", and "Edit". The table body is currently empty.

# SETTINGS

## Edit Profile

The Edit Profile option allows the contact details to be edited as needed. Fields with an asterisk are required.

### Overview of the Edit Profile Details:

Field	Value
First Name*	Ashlyn
Last Name*	Tyson (tester)
Email*	atyson@ctgconnect.com
Phone*	912-544-0450

## Adding Events

The Add Events Calendar is where all the events for all navigators can be seen. This is helpful for a patient who may like to have a face-to-face appointment with a navigator.

Pencil Me In Now  
www.pencilmenow.com

Dashboard Patient List Reports Settings Logout

Add Events

Past Today Future

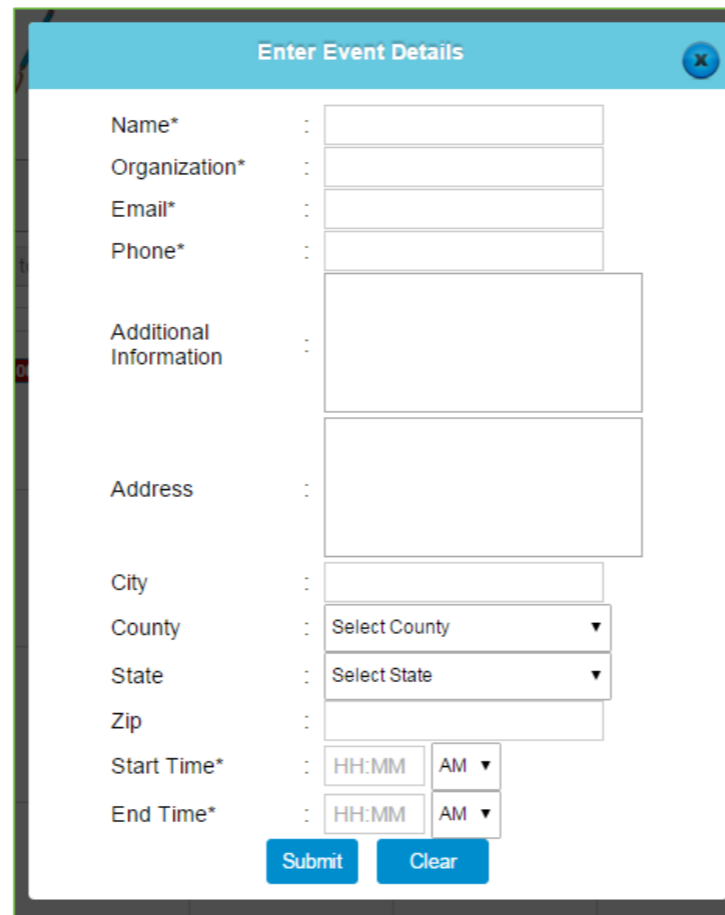
November 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 10:00 AM Test Test Corn	3 09:00 AM Open Enrollme	4 08:00 AM Tender Care C	5 09:00 AM info table Hall C	6	7 09:00 AM Info booth Pens
8 09:00 AM Info booth Pens	9	10 09:00 AM info table Forsy	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

## Adding Events

- Double-click on the day.
- Enter Event Details in the pop-up window.
- Asterisk indicates required fields.
- Note: to view information about a currently scheduled event, roll over the appointment or double-click for more details.

### Overview of the Events Details:



The screenshot shows a pop-up window titled "Enter Event Details" with a close button (X) in the top right corner. The form contains the following fields:

- Name\* :
- Organization\* :
- Email\* :
- Phone\* :
- Additional Information :
- Address :
- City :
- County :
- State :
- Zip :
- Start Time\* :
- End Time\* :

At the bottom of the form are two buttons: "Submit" and "Clear".

# Vehicle Mileage Log

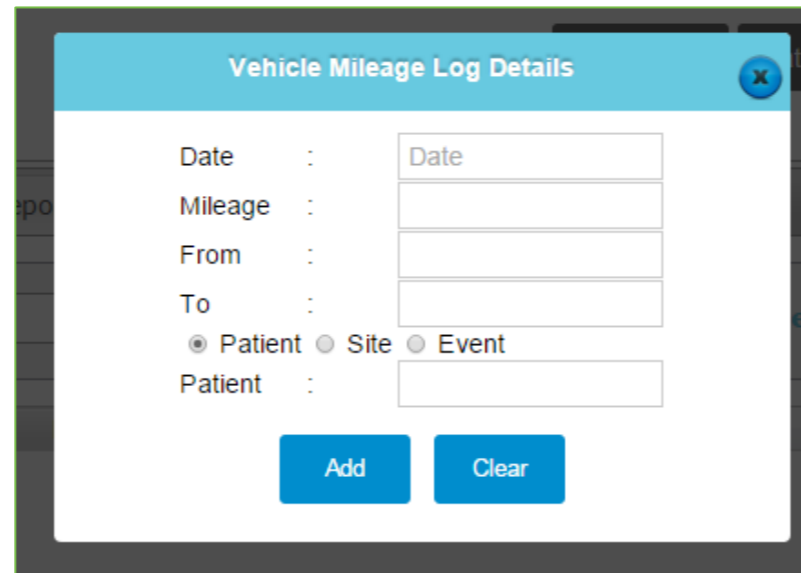
The Vehicle Mileage Log allows you to easily organize the mileage to and from any patient appointment, site visit, or event. With this Log, you can also export this information to Excel if needed.

## Overview of the Vehicle Mileage Log:

The screenshot shows the 'Vehicle Mileage Log' interface. At the top left is the 'Pencil Me In Now' logo with the website URL 'www.pencilmeinow.com'. To the right are navigation buttons: 'Dashboard', 'Patient List', 'Reports', 'Settings', and 'Logout'. Below these is a 'Vehicle Mileage Log' link. The main interface has two tabs: 'Milage list' (selected) and 'Milage reports'. Below the tabs is a search bar labeled 'Search all', 'Filter' and 'Clear' buttons, an 'Add Vehicle Mileage' button, and an Excel export icon. A table with the following headers is visible: 'Type', 'Name', 'Date', 'From', 'To', 'Mileage', and 'Edit'. The table body is currently empty.

# Vehicle Mileage Log

## Overview of the Vehicle Mileage Log Details:

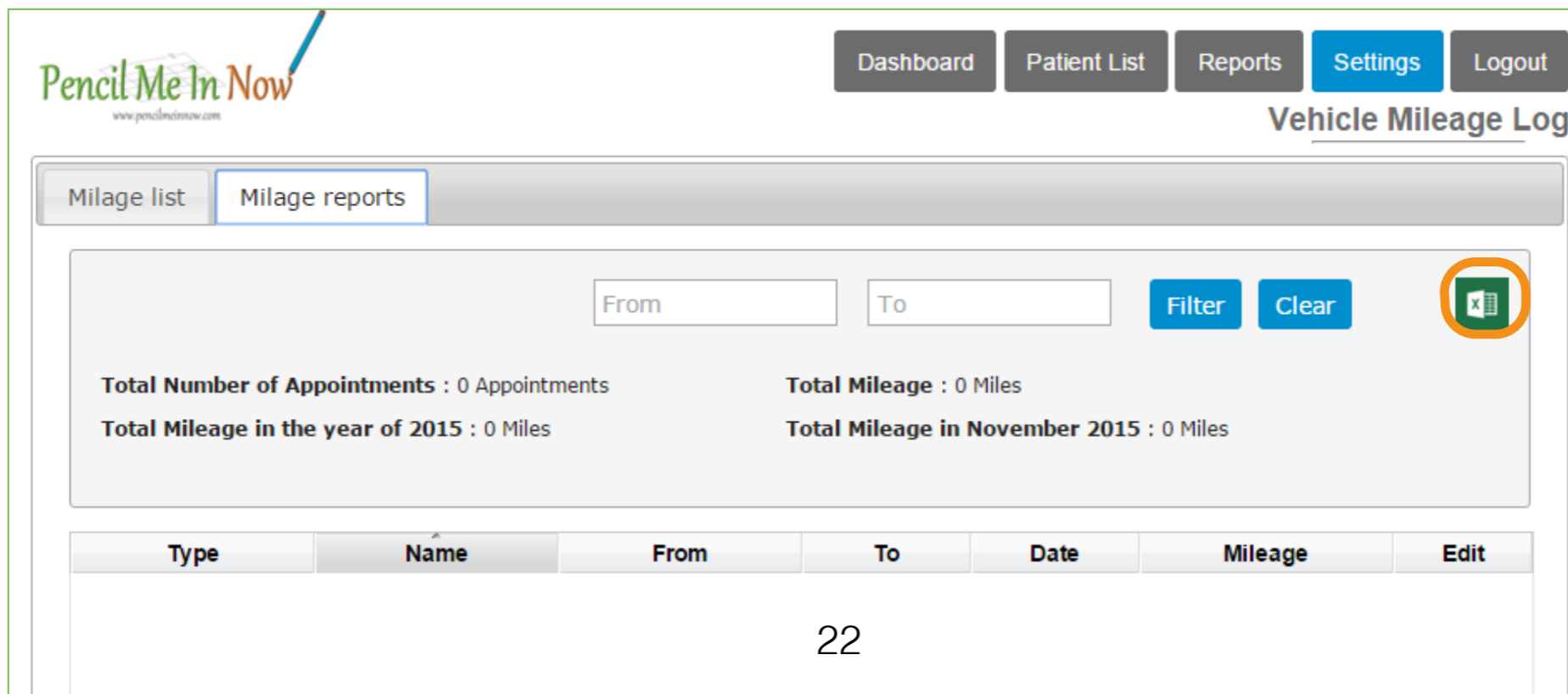


The screenshot shows a modal window titled "Vehicle Mileage Log Details". It contains the following fields and controls:

- Date :
- Mileage :
- From :
- To :
- Patient  Site  Event
- Patient :
- 

*After the mileage has been entered into the system, select the Mileage Reports tab. The report can be export to Excel by date range if needed.*

## Overview of the Vehicle Mileage Log Report:



The screenshot shows the "Vehicle Mileage Log" report interface. At the top, there is a navigation bar with buttons for "Dashboard", "Patient List", "Reports", "Settings", and "Logout". The "Settings" button is highlighted. Below the navigation bar, the "Vehicle Mileage Log" title is displayed. Underneath, there are two tabs: "Milage list" and "Milage reports", with "Milage reports" selected. The main content area includes a date range filter with "From" and "To" input fields, "Filter", and "Clear" buttons. To the right of the filter is an Excel export icon. Below the filter, the following summary statistics are displayed:

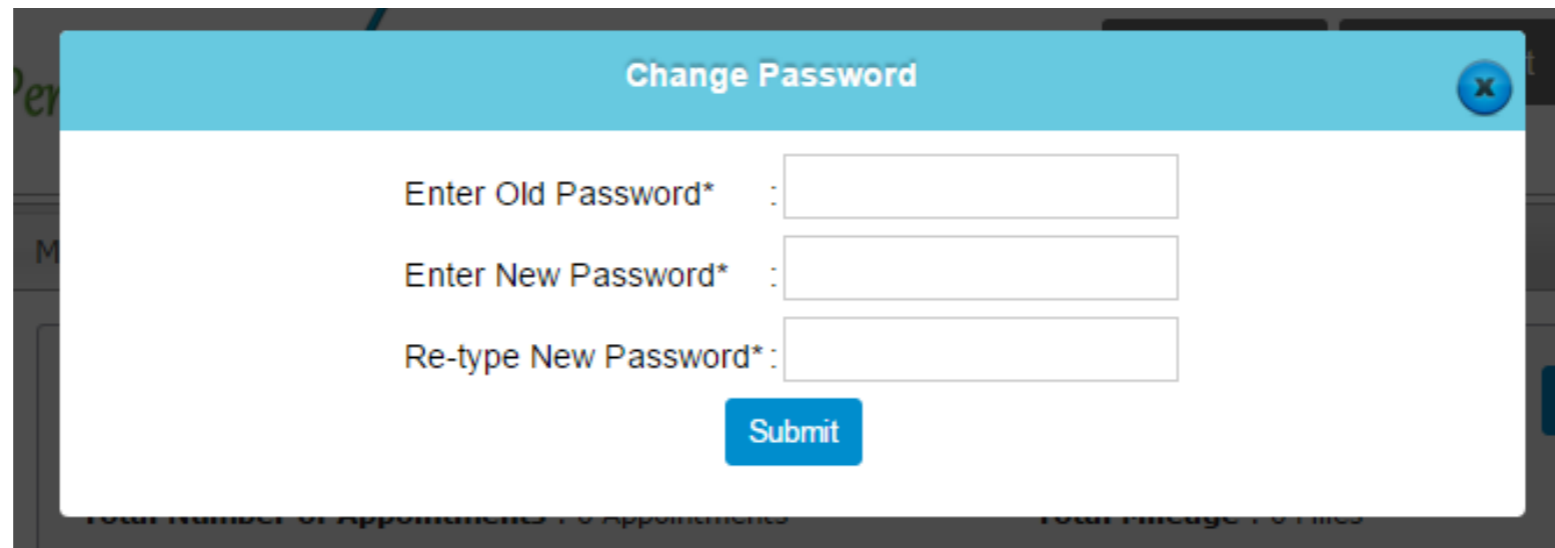
- Total Number of Appointments : 0 Appointments
- Total Mileage : 0 Miles
- Total Mileage in the year of 2015 : 0 Miles
- Total Mileage in November 2015 : 0 Miles

At the bottom, there is a table with the following columns: Type, Name, From, To, Date, Mileage, and Edit.

## Changing Password

Under the settings option, you to change your password.

Overview of the Change Password Window:



The screenshot shows a modal window titled "Change Password" with a close button (X) in the top right corner. The window contains three input fields with labels: "Enter Old Password\*", "Enter New Password\*", and "Re-type New Password\*". Below the input fields is a blue "Submit" button.

**\*\*Covenant Technology Group strongly recommends that you change your passwords regularly.\*\***

# TECHNICAL SUPPORT



## Database Technical Support

Covenant Technology Group  
Ashlyn Tyson  
Database Support Specialist  
912.544.0450  
[support@ctgconnect.com](mailto:support@ctgconnect.com)



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