Aerial™ InCircle

Mobile App User Guide

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Table of Contents

GETTING STARTED WITH INCIRCLE **2**

What is Aerial InCircle? 2
Types of InCircle Accounts 3
Supported Mobile Devices 3
Registering for InCircle 3

USING INCIRCLE **5**

Signing In to InCircle 5
Accessing the Menu 6
Navigating Member Profiles 6
Updating Your InCircle Profile 6
Signing Out of InCircle 7

ACCESSING HEALTH RECORDS **8**

About Health Records 8
Viewing Health Records 8

WORKING WITH CIRCLES **10**

Viewing a Circle 10
Creating a New Circle 10
Setting Permissions for a Circle 11
Editing the Name of a Circle 12
Inviting a Contact to a Circle 12
Resending a Circle Invitation 13
Removing a Contact from a Circle 13
Archiving a Circle 14
Viewing Circle History 14

SENDING AND RECEIVING MESSAGES **15**

Viewing Unread and Recent Messages 15
Viewing Group Messages in a Circle 16
Sending Messages 16
Starting a Video Chat 17

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Chapter 1

Getting Started with InCircle

In This Chapter

What is Aerial InCircle?.....2
Types of InCircle Accounts.....3
Supported Mobile Devices.....3
Registering for InCircle.....3

What is Aerial InCircle?

Aerial InCircle™ is a mobile app that connects everyone in your trusted health Circle with secure messaging.

Share secure messages with your healthcare professionals, care teams, and people you trust, and remain up to date on important care activity, directly from your mobile device.

InCircle is HIPAA compliant—any information and images you share with your health professional are stored and transmitted in a way that meets federal guidelines set for your safety and privacy.

You gain access to register and use the app from your sponsoring health organization, such as your health system or health insurance plan.

Together, these InCircle features empower your care communities to support your health and care:

- My Circles personalizes your care experience to connect your care relationships in Circles. You can invite anyone involved in providing care to you or someone close to you. Include your doctors, extended care team, social workers, services in your community, and more.
- Group Messages enables family, friends, and all contacts in your Circles to communicate directly with you and others about your health situation, so they are better informed to help in more meaningful ways.

Intuitive and easy to use by people of all ages, InCircle enables quick, timely, and actionable communication for everyone who needs to connect to your care.

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Types of InCircle Accounts

InCircle users are classified by four types of accounts, each with varying levels of access. The options you see in InCircle vary depending on your level of access.

Care Manager

A care manager is a registered Aerial user in the sponsor organization who is assigned to a member as the member's primary care coordinator. Each member is connected to a a care manager automatically when the member's account is created.

Member

A member is registered as an account owner by a care manager. Members are primary users of InCircle who can create circles and invite contacts to join circles. Members can also be added as contacts to circles for other members.

Contact

A contact is a user who is invited to a member's circle. Contacts may include healthcare professionals or other caregivers, family members, and friends. A contact may be associated with multiple members.

Delegate

A delegate is a user who operates the member’s account on the member's behalf. Delegates are verified by the sponsor organization.

Supported Mobile Devices

InCircle is fully tested and supported on mobile devices running the following operating systems:

- iOS: 13.6 and above
- Android: 10 and above

Registering for InCircle

You must register with InCircle before logging in for the first time.

To register with InCircle:

1. Open the email or text message invitation to join InCircle.
2. Download the InCircle app using the instructions provided in the invitation.
3. Register with InCircle:

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a) Tap the registration link in the email or text message invitation to display the Registration page.

b) Enter your phone number, a username, and a password.

Passwords must be between 8 and 16 characters and contain at least one upper case letter, one lower case letter, one special character, and one number.

c) Tap the check box to accept the Terms of Use and Privacy Policy.

d) Tap the **Submit** button to complete your registration.

4. Depending on the features set up by your sponsoring organization, the app may prompt you for additional information to access health records. Follow the prompts to finish setting up the app.

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Chapter 2

Using InCircle

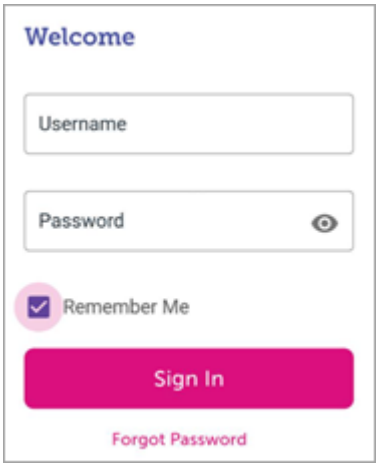
In This Chapter

Signing In to InCircle.....5
Accessing the Menu 6
Navigating Member Profiles 6
Updating Your InCircle Profile 6
Signing Out of InCircle 7

Signing In to InCircle

1. Open the InCircle mobile app, and then use the Welcome page to sign in.

> **Note:** If your mobile device supports Face ID, you can use Face ID instead of your username and password to sign in. To use Face ID, tap .



2. Tap the first field, and then enter your username.
3. Tap the next field, and then enter your password.

> **Note:** If you forgot your password, tap **Forgot Password**, enter your email address, and then tap **Submit**. InCircle sends you a password reset email.

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4. To save your username next time you log in, tap the **Remember Me** box.
5. Tap **Sign In**.

Accessing the Menu

To open the Menu, tap ☰.

Use the Menu to access these features:

- Health Records (on page 8): View your health records and health records for other members.
- My Circles (on page 10): View circles that you have access to as a member, contact, or delegate.
- Messages (on page 15): View and respond to messages.

You can also use the Menu to sign out of InCircle.

Navigating Member Profiles

You may be connected to multiple member profiles. For example, you can use InCircle as a member and also use InCircle as a contact or delegate in another member's circle.

If you are connected with multiple member profiles, tap the ‹ and › buttons at the top of the page to navigate to other profiles.

Updating Your InCircle Profile

You can update your phone numbers and password on your profile page.

1. Tap ☰. The menu displays.
2. Tap your profile picture. The My Profile page displays.
3. Update any of the following fields as needed:
    - Enter your main phone number in the **Phone** field, if available.
    - Enter your cell phone number in the **Cell Phone** field.
    - Update your password in the **Password** field.

      Passwords must be between 8 and 16 characters and contain at least one upper case letter, one lower case letter, one special character, and one number.
4. To save your updates, tap **Save**.

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Signing Out of InCircle

1. Tap ☰.
2. Tap **Sign Out**.

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Chapter 3

Accessing Health Records

In This Chapter

About Health Records 8
Viewing Health Records 8

About Health Records

The Health Records feature lets you view medications, lab tests, and procedures. This is an optional feature that is set up by your sponsor organization, so it may not be available to all users.

Access to health records depends on availability from the sponsor organization and the following circle permissions settings:

- If you are a member, you can view all of your health records.

  You can also set circle permissions for viewing health records. See **Setting Permissions for a Circle** (on page 11) for more information.
- If you are a delegate, you can view all of the health records for your member.
- If you are a contact, your permissions are set by the circle member, so you may not have access to the member's health records.

Viewing Health Records

To view health records, complete these steps:

1. Tap ☰. The menu displays.
2. Tap **Health Records**. The Health Records page displays with the following options:
   - To view medications, tap **Medications**. The Medications list displays.
   - To view lab tests, tap **Tests**. The Tests list displays.
   - To view procedures, tap **Procedures**. The Procedures list displays.

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3. To view more information about a specific medication, test, or procedure, tap ⌄ next to the item to expand it.
4. To go back to the Health Records page, tap <.

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Chapter 4

Working with Circles

In This Chapter

Viewing a Circle 10
Creating a New Circle 10
Setting Permissions for a Circle 11
Editing the Name of a Circle 12
Inviting a Contact to a Circle 12
Resending a Circle Invitation 13
Removing a Contact from a Circle 13
Archiving a Circle 14
Viewing Circle History 14

Viewing a Circle

You can view a circle to see a list of participants and access group messaging.

1. On the My Circles page, tap ⌄ next to the circle you want to view. The circle displays.
2. To close the circle, tap ⌃.

Creating a New Circle

Each Circle identifies a group of people who share the same messages and healthcare information pertaining to the Member.

As a Member, you have one circle set up by your care manager. You can add additional circles with different permissions and groups of contacts. For example, you may want to contact friends and neighbors with updates but set permissions (on page 11) to exclude them from seeing medications.

1. From the My Circles page, tap **+ CREATE NEW** to display the Create Circle page.
2. Tap the **Circle Name** field, and then enter the name of the circle.

   By default, the circle includes you, your care manager, and your delegate.

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3. To save the circle, tap **Save**. The form for inviting a new contact displays.

> **Note:** A new contact cannot access your Circle until the contact is invited and registered.

4. Enter information about the new circle contact into each field:

5. Tap **Invite To My Circle** to send an invitation to the new circle contact. A success message displays.
6. Choose an option:
   - To invite another new circle contact, tap **Invite Someone Else**.
   - To return to the My Circles page, tap **Maybe Later**.

Setting Permissions for a Circle

Use circle permissions to control the type of information that participants in each circle can see. This is an optional feature that is set up by your sponsor organization, so it may not be available to all users.

You can also include the same contact in multiple Circles, so that contact can communicate with the people in both Circles. If a contact is in multiple circles for the same member, the contact has access to the least restrictive permissions. For example, if a contact is part of one circle that has Medications disabled and another circle for the same member that has Medications enabled, that contact is able to view the member's Medications.

1. From the My Circles page, tap ⌄ to display the circle.

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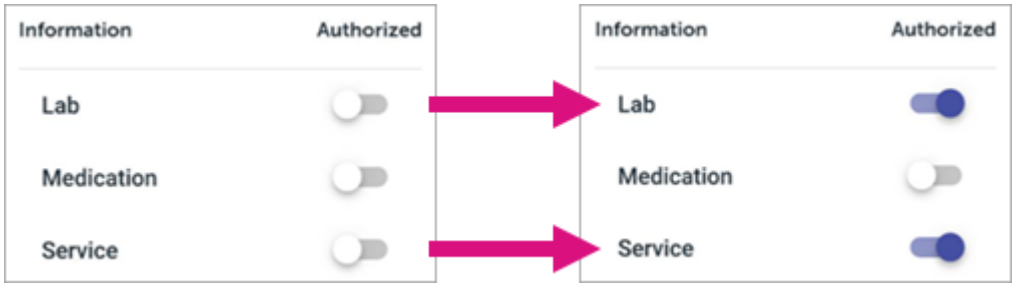
2. Tap **Edit Circle**.
3. Go to the bottom section, and then tap each switch to enable information circle participants can see.

   In the following example, Lab and Service permissions are enabled for circle participants, but not Medication permissions.



4. To save the updated circle permissions, tap **Save**.

Editing the Name of a Circle

You can edit the name of any circle. If you are a contact in a circle, renaming a circle only displays for you, not the other circle participants.

1. From the My Circles page, tap ⌄ to display the circle.
2. Tap **Edit Circle**.
3. Tap **RENAME CIRCLE**.
4. Enter the new name of the circle in the field.
5. To save the circle name, tap outside the field.

Inviting a Contact to a Circle

Members can add as many contacts as you want to a circle. New contacts cannot access your Circle until they are invited and registered.

1. From the My Circles page, tap ⌄ to display the circle.
2. Tap **Invite A New Member** to display the form for inviting a new contact.

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3. Enter information about the new circle contact into each field:

4. Tap **Invite To My Circle** to send an invitation to the new circle contact. A success message displays.
5. Choose an option:
   - To invite another new circle contact, tap **Invite Someone Else**.
   - To return to the My Circles page, tap **Maybe Later**.

Resending a Circle Invitation

Members can resend an invitation to a circle contact who has not yet joined or had the invitation time out.

1. From the My Circles page, tap ⌄ to display the circle.
2. Tap ↻ next to the contact to resend the invitation.

Removing a Contact from a Circle

Members and delegates can edit a circle to remove a contact.

1. From the My Circles page, tap ⌄ to display the circle.
2. Tap **Edit Circle**.
3. Tap 🗑 next to the participant to remove them from the circle.

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Archiving a Circle

Members and delegates can archive a circle you create if it is no longer needed.

> **Note:** This action cannot be undone.

1. From the My Circles page, tap ⌄ to display the circle.
2. Tap **Edit Circle**.
3. Tap **ARCHIVE CIRCLE**. The circle displays in the My Archived Circles section.

Viewing Circle History

You can display an archived circle to view its participants and historical group messages.

1. On the My Circles page, go to the My Archived Circles section, and tap ⌄ to display the archived circle.
2. Tap **View Circle History** to display historical group messages.
3. Tap ‹ to go back to the My Circles page.

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Chapter 5

Sending and Receiving Messages

In This Chapter

Viewing Unread and Recent Messages 15
Viewing Group Messages in a Circle 16
Sending Messages 16
Starting a Video Chat 17

Viewing Unread and Recent Messages

The Messages page lets you keep up-to-date on group messages in all your circles.

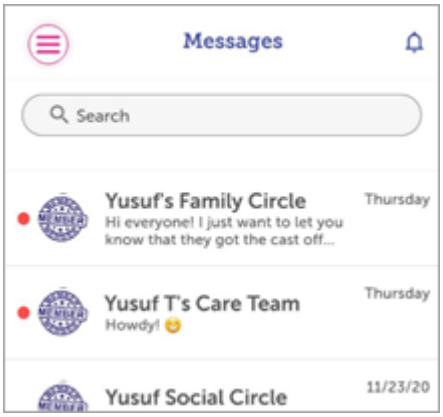
To view recent messages, complete the following steps:

1. Tap ☰. The menu displays, and the number of unread messages displays next to the Messages option.

   In the following example, there are four unread messages.

2. Tap **Messages**. The Messages page displays.

   Colored dots indicate circles with unread messages. You can also use the Search bar to search for a circle.



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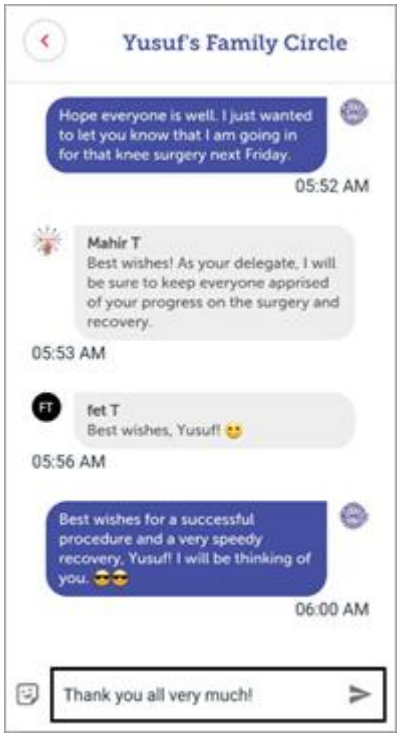
3. To view messages, tap on the circle name. The group messages for that circle display.

Viewing Group Messages in a Circle

The Group Messages feature lets you contact everyone in a circle.

1. From the My Circles page, tap ⌄ to display the circle.
2. Tap the **Group Message** button to display group messages.

Example: Group Messages



Sending Messages

The Group Messages feature lets you send and receive messages to everyone in a circle.

> **Note:** You cannot send messages in an archived circle.

To send a message, complete the following steps:

1. Enter your message in the box.

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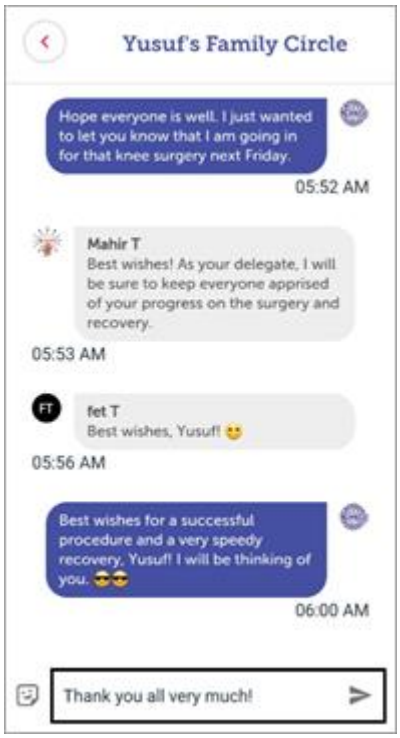
2. To include an emoji in your message, tap , and then tap the emoji you want to send.
3. Tap to send the message.

Example: Sending a Group Message



Starting a Video Chat

The Video Chat feature lets you host a video chat with everyone in a circle.

1. From the My Circles page, tap to display the circle.
2. Tap **Video Chat** to begin the video chat.
3. When you are finished with the video chat, tap **Hang Up**, and then tap **Disconnect Call**.

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