MemorySparx Connect

Administrator Guide

This guide helps system and care circle administrators to plan their rollout, create circles, add members, manage staff lists, and set user permissions. For help with creating and managing content inside of circles, see the User Guide at memorysparx.com/support.

CONTENTS

WELCOME TO MEMORYSPARX CONNECT

MemorySparx Connect (app.memorysparx.com) is a secure online tool that gives care providers, family members, and care recipients access to a shared circle of information about a care recipient's day, life, and health. The tool also provides in-the-moment chat and a list of content updates to keep everyone in-the-loop.

MemorySparx Connect is fun to use and works on your smartphone, tablet, or computer so it's easy for your care team to collaborate and update content on the go.

Informed teams provide exceptional care. With MemorySparx Connect, your care team can:

- **Know the plan** – Collaborate on a shared daily agenda for the care recipient.
- **Build trust** – Know what matters to the care recipient with photos and videos that reflect their life story.
- **Stay organized** – Keep track of health information and wellness notes in one central place.
- **Communicate with ease** – Consult the people who know the care recipient best using secure chat messaging.
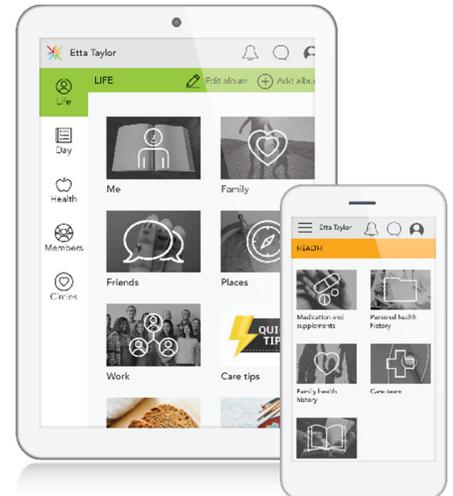
HOW MEMORYSPARX CONNECT HELPS

Care recipients

- Participate according to your own unique abilities.
- Stay connected to family and friends.
- Get to know care practitioners.
- Reminisce and share meaningful insights with your care team.

Family members

- Streamline communications by inviting the people who need to stay informed.
- Brighten the day for a loved one by sharing personalized content.
- Communicate easily with care practitioners.
- Feel confident about the quality of care.

Care practitioners

- Know what matters to the care recipient.
- Start interactions off on the right foot.
- Build rapport with the care recipient and their loved ones.
- Exchange tips with other care team members.
- Use meaningful content to enrich care and redirect or prevent behaviors.

Organizations

- Give staff on-the-go access to information that makes a difference.
- Maintain open, easy, and secure communication within your care teams.
- Show your commitment to person-centered care.

ABOUT CARE CIRCLES

Care circles provide a secure place for members to collaborate and share information about a care recipient's day, life, and health. Inside the circle, members can add and update content, see changes made by other members, and chat with one another.

Circles are created by an administrator after receiving consent from the care recipient or their substitute decision maker. Members of the circle can include staff members of the care organization or personal and professional connections of the care recipient including family members, friends, or external health practitioners. The care recipient can be invited to join their own circle, or not, depending on their unique needs. Permissions can be applied to restrict access to some features for some circle members.

SUPPORTED DEVICES AND WEB BROWSERS

MemorySparx Connect works on any internet-connected smartphone, tablet, or computer that can run a recent version of one of the following supported web browsers:

- Google Chrome
- Apple Safari

To record audio in MemorySparx Connect, your device must have a microphone. To capture original photos and videos in MemorySparx Connect, your phone or tablet must have a camera. MemorySparx Connect does not support capturing original photos or videos with a computer.

For easier access to MemorySparx connect on your iOS or Android mobile device, install the MemorySparx Connect app.

SUPPORTED VIDEO FILE SIZE AND FORMAT

MemorySparx Connect supports video files up to 500MB in size.   That's about 1 to 2 minutes. The following video file formats are supported: .mp4, .mov.

PLAN YOUR ROLLOUT

If your organization is new to MemorySparx Connect, our experienced customer success team can help you to define your desired outcomes and create a customized rollout plan. Contact us to get started at support@memorysparx.com.

Here's what you can expect on the journey:

		What you do	How we help
Onboarding	Plan	Identify your project stakeholders. Participate in requirements gathering interviews. Confirm your desired outcomes and rollout plan. Accept your system administrator invitation. Create a test circle. Create circle administrator accounts (if applicable). Share your feedback.	Provide a product demo for your project team. Interview your project stakeholders. Facilitate a care circle planning workshop. Invite your system administrator to sign in. Provide administrator documentation and support. Consult with your team on rollout planning. Collect feedback on the planning phase.
Onboarding	Rollout	Inform staff and create their accounts. Obtain consent from care recipient (or substitute decision maker). Create circles. Inform and invite external connections. Celebrate your success. Remind users what you need them to do.	Provide staff orientation and support resources. Provide introductory resources and consent form template. Coach your circle administrators during rollout. Provide user orientation and support resources. Report on progress and opportunities. Collect early use feedback from your users.
Adoption	Encourage	Encourage circle members to add content. Keep staff permissions updated. Keep circle membership updated. Inform new staff and clients about the tool. Share and celebrate your success. Renew your contract.	Provide tips and inspirations. Answer support inquiries and updated resources. Provide refresher training. Create case studies to promote your success. Collect late use feedback from your users. Report on your progress and opportunities.
Expansion	Grow	Act on opportunities to expand use within your organization.	Provide ongoing reports on user behavior and opportunities for expansion. Provide support for your expansion efforts.

ABOUT ROLES AND PERMISSIONS

ADMINISTRATOR PERMISSIONS

MemorySparx Connect supports one system administrator and multiple circle administrators for each organization. Administrators can see and manage all circles and staff in the organization. Permissions for the system administrator can not be modified. Permissions for circle administrators are set when the user is added, or later in the staff list.

	System administrator	Circle administrator
Accept the terms of service for your organization	Yes	No
Change the system administrator for your organization	Yes	No
Add and manage staff members	Yes	Yes
Add and manage circle administrators	Yes	Yes (with permission)
Access content and manage connections in all circles	Yes	Yes (with permission)
Access chat in all circles	No (must be member)	No (must be member)

CARE CIRCLE MEMBER PERMISSIONS

MemorySparx Connect supports three types of circle members:

- **Circle administrator (owner):** When an administrator creates a circle, they assign a circle administrator to own the circle. The assigned circle administrator can access all content and members in the circle.
- **Staff members:** An administrator can add anyone in the staff list as a circle member. Permissions set in the staff list for each staff member determine what they can do in all circles they're added to.
- **Connections:** An administrator or other circle member with permission can add the care recipient's personal or professional connections to the circle. Connections can include family members, friends or external care practitioners. Permissions set for connections are unique to each circle they're added to.

	Circle admin (owner)	Staff member	Connection
Access day and life content	Yes	Yes	Yes
Access health content	Yes	Yes (with permission)	Yes (with permission)
Send and receive chat messages	Yes	Yes (with permission)	Yes (with permission)
Edit care recipient account details and permissions	Yes	Yes (with permission)	Yes (with permission)
Add and manage connections in the circle	Yes	Yes (with permission)	Yes (with permission)
Invite a care recipient to their own circle	Yes	Yes (with permission)	Yes (with permission)

CARE RECIPIENT PERMISSIONS

If the care recipient wants to sign in and use their own circle, an administrator or circle member with permission can add the care recipient to the circle. Permissions for care recipients are set when the user is added, or later in the circle Members page. Care recipients can always view content in their own care circle. The following additional permissions can also be granted:

- Add, edit, and delete circle content
- Access health content

Additionally, the default sign out after 60 minutes of inactivity can be turned on or off for care recipients. It can not be turned off for other roles.

ACCEPT A SYSTEM ADMINISTRATOR INVITATION

Each organization has one system administrator who accepts the Terms of Service for Customers (memorysparx.com/legal) on behalf of the organization and has access to all circles and staff in the organization. The system administrator invitation will be sent by the MemorySparx support team during rollout planning. If you have questions about the Terms of Service for Customers or the system administrator invitation, contact us at support@emmetros.com.

To accept the system administrator invitation:

1. In the "Welcome to MemorySparx Connect…" email, click Accept. The MemorySparx Connect website opens in a browser.
2. On the Account details page, click Continue.
3. Review the Terms of Service for Customers and Privacy Policy on behalf of your organization. If you agree to proceed, click the "I agree…" check box. Click Continue.
4. Type a new password. Click Continue. The introduction pages appear.
5. Click Continue. The Circles screen appears.

After the system administrator accepts the invitation, they can sign into MemorySparx Connect and begin to add and manage staff members and circles.

CHANGE THE SYSTEM ADMINISTRATOR FOR YOUR ORGANIZATION

The current system administrator can choose a circle administrator to become the new system administrator for the organization.

1. On the staff page, click a circle administrator ⓐ.
2. Click Edit ✎.
3. Select System administrator in the Role drop-down list.
4. Click Done ✓.

After this change, the previous system administrator becomes a circle administrator.

SIGN IN TO MEMORYSPARX CONNECT

Turn on your smartphone, tablet, or computer and verify that it is connected to a wi-fi or cellular network.

To sign in to MemorySparx Connect for the first time, click Accept in your email invitation or open MemorySparx Connect and type the login credentials provided by an administrator at your organization. The first time you sign in you must agree to the Terms of Service (www.memorysparx.com/legal).

To open MemorySparx Connect, click the MemorySparx Connect App icon on your mobile device home screen, or open the latest version of a Chrome, Safari, or Firefox web browser on your smartphone, tablet, or computer and visit app.memorysparx.com.

On the sign-in page, type your email address and password. Click Sign in. If you don't know or have forgotten your password, click Forgot Password. A password recovery link will be sent to your email address, or you can request a password reset from an administrator at your organization.

SIGN OUT OF MEMORYSPARX CONNECT

To sign out, click the My account icon ⬤ in the top right corner of the page. Click Sign out ⏻.

For security purposes, accounts sign out after 60 minutes of inactivity. Auto sign out can be turned off for care recipient accounts if required.

INSTALL THE MEMORYSPARX CONNECT APP ON YOUR PHONE OR TABLET

To quickly access MemorySparx Connect from an icon on your iOS or Android smartphone or tablet home screen, install the MemorySparx Connect app. The app gives you one click access to the same features available on the app.memorysparx.com web site.

1. Sign in to MemorySparx Connect.
2. Click the My account icon ![account icon] in the top right corner of the screen.
3. Click Install app. Follow the on-screen instructions.

    If you use an iOS device, in the Safari browser menu bar, click the Share icon ![share icon]. Click Add to Home Screen.
4. Close the browser.

![MemorySparx icon] The MemorySparx Connect App icon appears on your device home screen. Click the icon to open the app.

USE THE LEFT NAVIGATION MENU

Use the left navigation menu to move between pages in MemorySparx Connect.


If you use MemorySparx Connect on a smartphone, click the Menu icon to in the top left corner to expand the left navigation menu.

If you have access to more than one circle, click Circles to view a list of the circles that you can access. Click the name of a care recipient to open the circle.

If you are an administrator, click Staff to view a list of the staff members and circle administrators in your organization. Click a staff member name to view their account details and circle assignments.
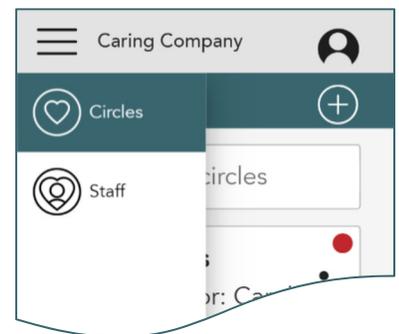
Inside a circle, additional options appear in the left navigation menu:

Click Day to view and add events, photos, or videos each day.

Click Life to access photos, video, and information about the care recipient's life story.

Click Health to see medication lists, health history, care provider contact information, and the care journal.

Click Members to see who else has access to the circle and to add or manage connections if you have permission to do so.
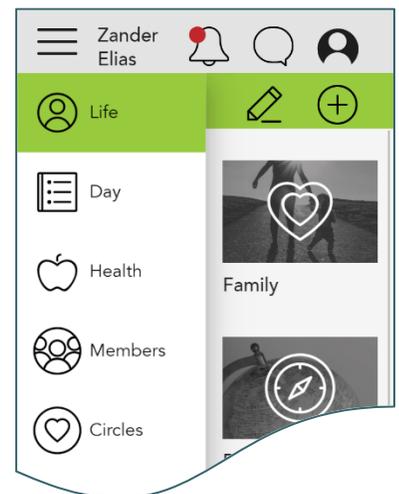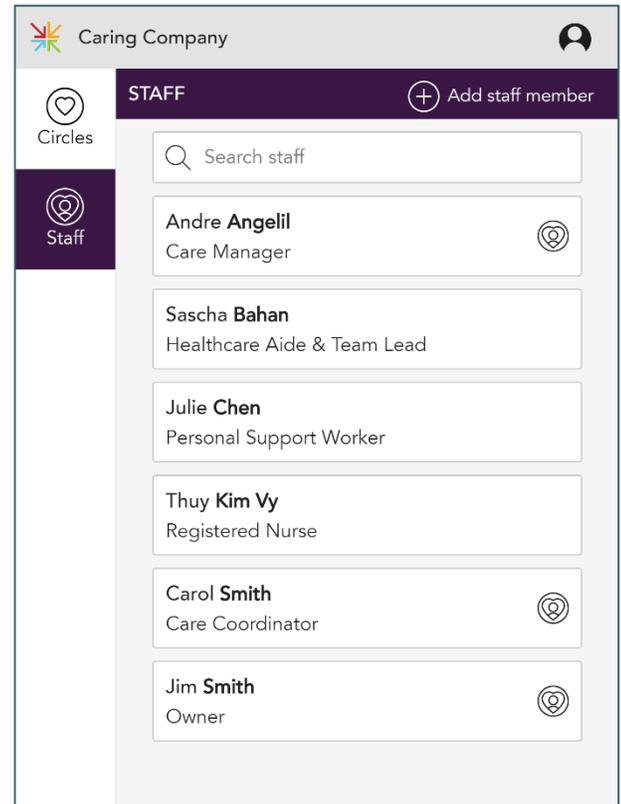
MANAGE STAFF MEMBERS AND ADMINISTRATORS

To open the Staff page, click Staff in the left navigation menu. If you do not see the option in the left navigation, click Circles and then click Staff.

Administrators are indicated by an icon in the staff list.

ADD A STAFF MEMBER OR CARE CIRCLE ADMINISTRATOR TO THE STAFF LIST

When an administrator adds a user to the staff list, they set permissions and login details for the user. Permissions apply to all circles the user is added to. The user will be required to change their password the first time they sign in. See Provide login details to new staff members on page 10 for more information.

1. On the Staff page, click Add staff member ⊕.
2. Type the user details. Click Next →.
3. Select one of the following options:

   - To give this user the circle administrator role, click Yes.
   - To give this user the staff member role, click No.

4. Check the desired permissions for this user. Click Next →.
5. If the user is a staff member, optionally select the circles that you want to add them to. Click Next →.
6. Type a username and temporary password for this user. Click Next →.
7. Make note of the username and temporary password. You will need to provide these login details to the user. Click OK.

PROVIDE LOGIN DETAILS TO NEW STAFF MEMBERS

When an administrator adds a new user to the staff list, they set a username and temporary password for that user. These login details must be provided to the user so that they can sign in to MemorySparx Connect for the first time. Be mindful of security and distribute user login details verbally in-person, or over the phone.

Along with login details, it is helpful to give new staff members information about why your organization is using MemorySparx Connect and what you expect the staff member to do with the tool after they sign in. Remind users that they can email support@memorysparx.com if they have feedback or questions about how to use MemorySparx Connect.

EDIT ACCOUNT DETAILS AND PERMISSIONS FOR A STAFF MEMBER

1. On the Staff page, click a staff member name.
2. Click Edit ✐.
3. Type corrected account details or adjust the selected permissions.
4. Click Done ✔ .

RESET THE PASSWORD FOR A STAFF MEMBER

If a staff member loses their password, or if their temporary password expires before they sign in, an administrator can reset the password.

1. On the Staff page, click a staff member name.
2. Click Reset password.
3. Type a new password. Click Next →.
4. Make note of the username and temporary password. You will need to provide this information to the user so that they can log and pick a new password. Click OK.

ADD A STAFF MEMBER TO A CARE CIRCLE

Before you can add a staff member to a circle, they must be added to the staff list. See Add a staff member or care circle administrator to the staff list on page 10 for more information.

1. On the Staff page, click a staff member name.
2. In the Assigned circles list, click Add ⊕.
3. Select the circles that you want this staff member to access.
4. Click Next →.

Alternately, use the Circles page to add staff members to circles.

1. On the Circles page, locate the circle you want to change and click More ⋮.
2. Click View circle members.
3. In the Staff members section click Add ⊕.
4. Select staff members that you want to associate with this circle. Click Next →.

REMOVE A STAFF MEMBER FROM A CARE CIRCLE

When a staff member is removed from a circle, the circle will no longer appear on their Circles page and they will not be able to access the circle.

1. On the Staff page, click a staff member name.
2. In the Assigned circles list, click Remove ⊗.
3. Click Remove member.

Alternately, use the Circles page to remove a staff member from a circle.

1. On the Circles page, locate the circle you want to change and click More ⋮.
2. Click View circle members.
3. In the Staff members section, beside the staff member that you want to remove, click Remove ⊗.
4. Click Remove member.
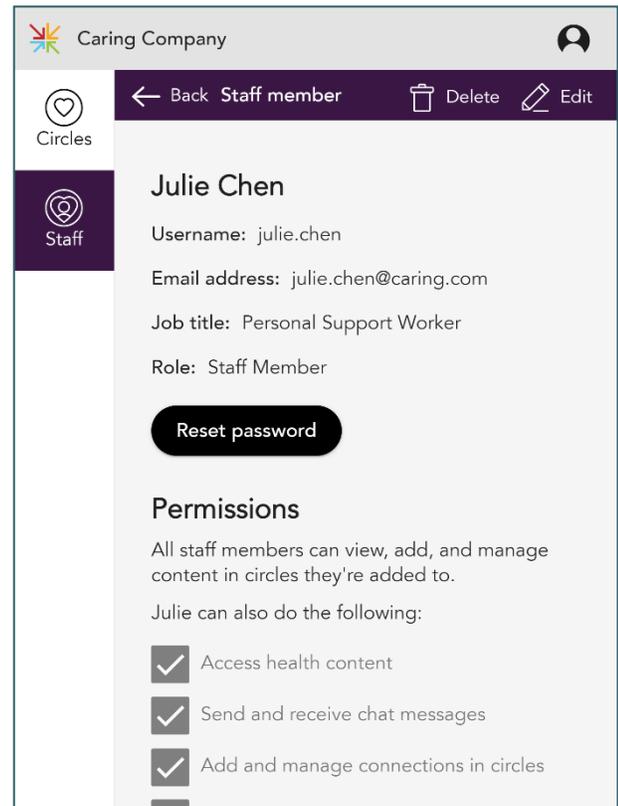
CHANGE THE ADMINISTRATOR (OWNER) FOR A CARE CIRCLE

1. On the Circles page, locate the circle you want to change and click More ⋮.
2. Click Change administrator.
3. Select a new administrator from the Circle administrator drop down list.
4. Click Done ✔.

DELETE A STAFF MEMBER FROM THE STAFF LIST

Administrators can delete staff members from the staff list. Deleted staff members can no longer sign in to MemorySparx Connect.

1. On the Staff page, click a staff member name.
2. Click Delete 🗑.
3. Click Delete staff member.

MANAGE CARE CIRCLES

To open the Circles page, click Circles in the left navigation. To open a circle, click the care recipient name on the Circles page.

CREATE A CARE CIRCLE

Before you create a circle, you must obtain written consent from the care recipient or their substitute decision maker.

1. On the Circles page, click Add circle ⊕.
2. Type the care recipient name. Click Next →.
3. Select a circle administrator from the drop-down list. Click Next →.
4. Select which staff members you want to add to this circle. Click Done ✔.

After the circle is created, you can use the circle Members screen to invite their personal or professional connections to the circle. See Invite a personal or professional connection on page 13 for more information.
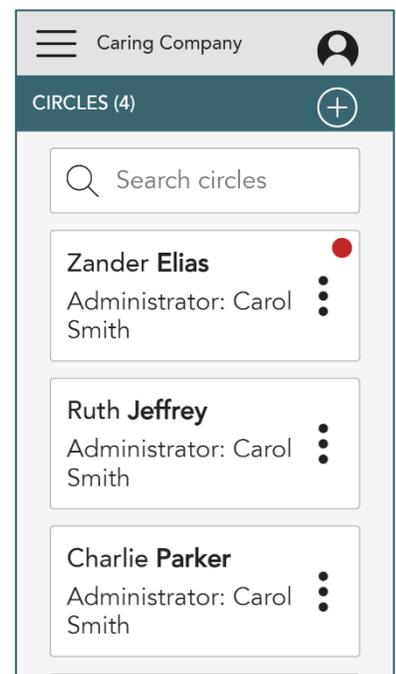
INVITE A PERSONAL OR PROFESSIONAL CONNECTION TO A CARE CIRCLE

An administrator or circle member with permission can invite personal or professional connections of the care recipient to join the circle. Connections can include family members, friends, or external health practitioners. Connections must accept an email invitation before they can sign in to MemorySparx Connect and access circles.

1. On the Circles page, click a care recipient name to open the circle.
2. Click Members in the left navigation menu.
3. On the circle Members page, in the Connections section, click Add ⊕ .
4. Select whether this is a personal or professional connection.
5. Type an email address for the connection. This address will receive the invitation. Click Next → .
6. Type account details for the connection. Click Next → .
7. Set permissions for this connection. Permissions apply only to the selected circle. Click Next → .
8. If prompted, set a security question and answer. You will need to share this information with the connection so that they can log in for the first time. Click Next → .
9. Click OK.
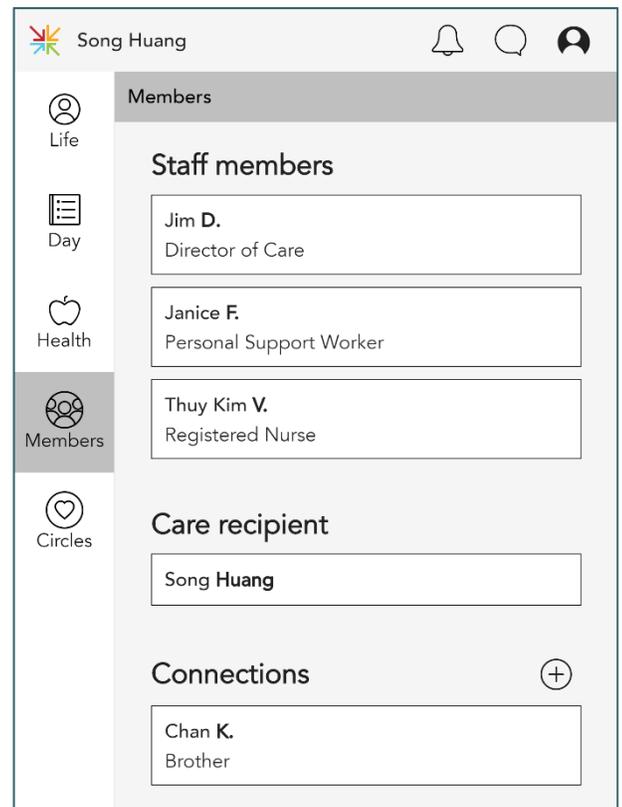
To see invitation status for the connection, click their name on the circle Members page.

Make note of the username and temporary password. You will need to provide this information to the care recipient so that they can log in for the first time and pick a new password. Click OK.

RESEND AN INVITATION

If a connection loses their invitation, or if it expires, and administrator or connection with permission can resend it.

1. On the Circles page, click a care recipient name to open the circle.
2. Click Members in the left navigation menu.
3. On the circle Members page, click the connection name.
4. Click Resend invitation.
5. Click Ok.

EDIT PERMISSIONS FOR A CONNECTION

Administrators and circle members with permission can edit permissions for a connection. Permission changes made to a connection only apply to the selected circle.

1. On the Circles page, click a care recipient name to open the circle.
2. Click Members in the left navigation menu.
3. On the circle Members page, click a connection.
4. Click Edit ✎ .
5. Change the selected permissions.
6. Click Done.
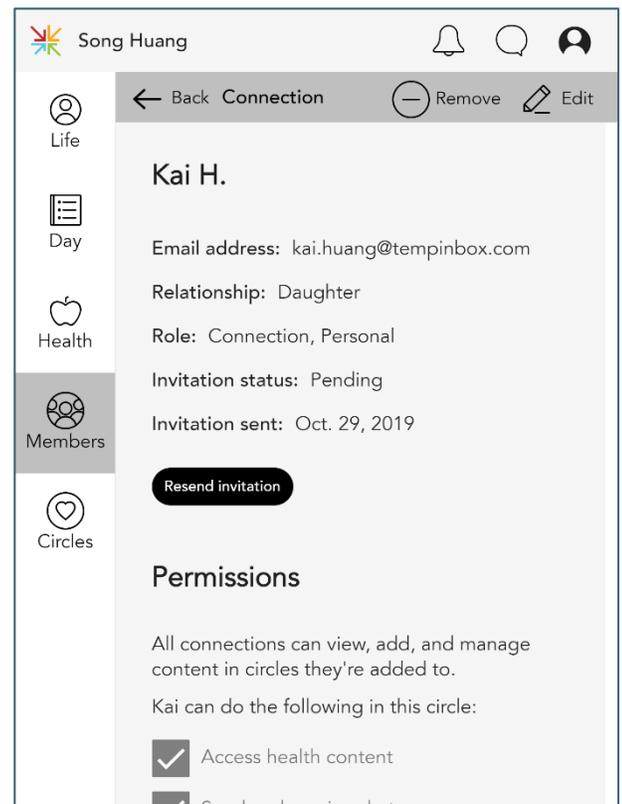
REMOVE A CONNECTION FROM A CARE CIRCLE

Administrators and circle members with permission can remove a connection from a circle. When a connection is removed from a circle, the circle will no longer appear on their Circles page, and they will not be able to access the circle.

1. On the Circles page, click a care recipient name to open the circle.
2. Click Members in the left navigation menu.
3. On the Members page, click a connection.
4. Click Remove ⊖.
5. Click Remove member.

INVITE THE CARE RECIPIENT TO THEIR OWN CARE CIRCLE (OPTIONAL)

If a care recipient wants to sign in to their own circle, an administrator or circle member with permission can create login details for the care recipient. Be mindful of security and distribute login credentials to the care recipient verbally in-person, or over the phone. The care recipient will be required to change their password the first time they sign in.

1. On the Circles page, click a care recipient name to open the circle.
1. Click Members in the left navigation menu.
2. On the circle Members page, click the care recipient name.
3. Click Invite care recipient.
4. Select permissions for the care recipient. Click Next →.
5. Type a username and password for the care recipient. Click Next →.

## EDIT ACCOUNT DETAILS AND PERMISSIONS FOR THE CARE RECIPIENT

Administrators and circle members with permission can edit account details and permissions for the care recipient. The care recipient can also edit their own account details and permissions if they have been invited to their own circle.

1. On the Circles page, click a care recipient name to open the circle.
2. Click Members in the left navigation menu.
3. On the circle Members page, click the care recipient name.
4. Click Edit ✎.
5. Type updated account details or select new permissions for the care recipient.
6. Click Done ✔.

DELETE A CIRCLE

Deleted circles are no longer visible to any users on the Circles page.

1. On the Circles page, locate the circle you want to delete and click More ⋮.
2. Click Delete circle.
3. Click Delete circle.
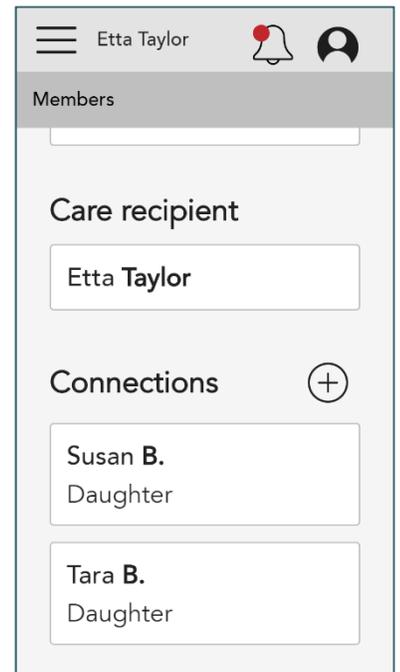
CHANGE YOUR OWN ACCOUNT INFORMATION

All users can edit their own profile information including name, email address, password, and communication preferences.

1. Click the My account icon ⬤ in the top right corner of the page.
2. Click My account.
3. Select one of the following options:

   - To edit your name or email address, click Edit profile. Type changes. Click Done ✔.
   - To change your password, click Change password. Type the current password and new password. Click Done ✔.
   - To change your communication preferences, check the boxes.