

This guide helps account managers and care managers through each step of setting up MemorySparx Connect for an organization. For information about adding content to MemorySparx Connect see the Welcome Guide for Users at memorysparx.com/support. Contact us with questions or feedback at support@memorysparx.com.

CONTENTS

Welcome to MemorySparx Connect	2
How MemorySparx Connect helps	2
About care circles.....	3
Role and permissions overview	3
Supported devices and web browsers.....	4
Supported video file size and format.....	4
Rollout checklist for your organization.....	5
Create a rollout plan	5
Accept an account manager invitation	6
Add a care manager (optional)	6
Accept a care manager invitation	6
Sign in to MemorySparx Connect.....	7
Sign out of MemorySparx Connect.....	7
Install the MemorySparx Connect app on your phone or tablet	7
View the left navigation menu and switch between care circles	7
Create a care circle and invite members	8
Manage changes to a care circle	9
Manage circle members and member permissions.....	9
Add a care partner to a care circle	9
Invite a care recipient to a care circle later.....	9
Resend an invitation to a care partner or care recipient	9
Edit permissions for a care partner.....	10
Remove a care partner from a care circle.....	10
Edit account details and permissions for a care recipient.....	10
Manage circles	11
Change the care manager for a circle	11
Delete a care circle	11
Resend an invitation to a care manager	11
Remove a care manager.....	11
Change the account manager for your organization.....	12
Change your own account information	12

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 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.



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.



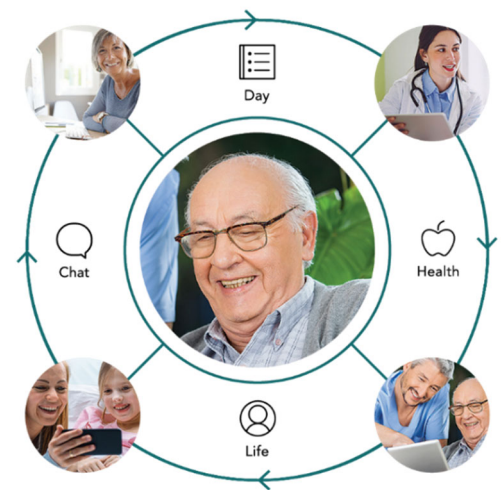
Organizations

- 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 any invited member to collaborate and share information about a care recipient's day, life, or health. Circle members can see changes made by other members and chat with one another. A care circle manager creates the circle and invites trusted family members, friends, care providers, or other health practitioners to join. Permissions are used to control what each member can see and do inside the circle. Care recipients can be invited to their own circle, or not, depending on their unique needs.

After accepting an invitation, care circle members can sign in to access the circle from their smartphone, tablet, or computer.



ROLE AND PERMISSIONS OVERVIEW

Roles determine which care circles a user can see as well as whether a user can create new circles for an organization. MemorySparx Connect supports four roles, some users may have more than one role:

- **Account managers** can access all circles they create and all circles created by care managers in their organization.
- **Care managers** can access all circles they create; they cannot see circles created by other care managers.
- **Care partners** can access circles they have been invited to participate in.
- **Care recipients** can access their own care circle if they have been invited to do so.

Within a circle, permissions can be set to determine what each care partner and care recipient can do. By default, care recipients have read-only access to content, but they can be granted permission to add, edit, and delete content. Permissions can be set when a user is invited to the circle, or later in the Members list.

	Account Manager	Care Manager	Care Partner	Care Recipient
Add care manager	Yes	No	No	No
Create care circle and (optional) invite recipient	Yes	Yes	No	No
Add / remove / edit permissions for care partner	Yes	Yes	Yes – with permission	No
Add / edit / delete content	Yes	Yes	Yes	Yes – with permission
Access health content	Yes	Yes	Yes – with permission	Yes – with permission
Edit care recipient permissions	Yes	Yes	Yes – with permission	No
Edit care recipient profile details	Yes	Yes	Yes – with permission	Yes
Chat with other circle members	No	Yes	Yes – with permission	Yes – with permission

SUPPORTED DEVICES AND WEB BROWSERS

MemorySparx Connect works on any internet-connected smartphone, tablet, or computer that can run one of the two latest versions of a supported web browser. Supported web browsers include:

- Google Chrome
- Apple Safari
- Mozilla Firefox

The following minimum screen resolution is recommended to display all web elements correctly:

- Desktop / laptop – 1280 x 720 pixel or higher
- Tablet – 1024 x 748 pixel or higher
- Phone – 1334 x 750 pixel or higher

To see the browser version and screen resolution for your device, visit this website using your device:

www.whatismybrowser.com.

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. See Install the MemorySparx Connect app on your phone or tablet on page 7 for more information.

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.

ROLLOUT CHECKLIST FOR YOUR ORGANIZATION

To start using MemorySparx Connect at your organization, you will need to do the following:

- Create a rollout plan
- Accept an account manager invitation
- Add a care manager (optional)
- Create care circles and invite members
- Manage changes to care circles

CREATE A ROLLOUT PLAN

If your organization is new to MemorySparx Connect create a rollout plan to organize your efforts. Our experienced customer success team provides coaching, planning templates, user training, and more to assist with your planning, preparation, and rollout activities. Contact us to get started at support@memorysparx.com.

To prepare for your rollout, consider:

- Who will lead the MemorySparx Connect rollout within your organization?
- Which care recipients will be supported by the tool?
- Which staff members, family members, or friends of the care recipient will be added to each circle?
- What resources or permissions will each user need to help them succeed?
- What benefits do you want your organization to realize by using MemorySparx Connect?
- Who needs to take action to realize these benefits? What resources or training will support these actions?
- How will you generate excitement and educate users within your organization?
- Who will be responsible for adding and managing care circles in your organization?

ACCEPT AN ACCOUNT MANAGER INVITATION

The account manager champions the implementation of MemorySparx at your organization. There is typically only one account manager for an organization. They will accept the terms of service (memorysparx.com/legal) on behalf of the organization, add care managers, and see all care circles created by themselves or the care managers they add.

To request an account manager invitation, send the name, email address, and company name for your desired account manager to support@emmetros.com.

To accept their invitation, the account manager must do the following:

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. Type a password.
4. Click Sign up. The introduction pages appear.
5. Click Continue.

After the account manager accepts the invitation, they can add a care circle or add a care manager to add and manage circles.

ADD A CARE MANAGER (OPTIONAL)



The account manager can invite one or more care managers to help with adding and managing care circles for the organization. Care managers can access all of the circles they create; they cannot see circles created by other care managers unless they are invited join to those circles as a care partner.

1. Sign in to MemorySparx Connect as the account manager.
2. Click Care managers.
3. Click Add care manager.
4. Type the email address of the care manager. Click Continue.
5. Type first and last name of the care manager. Click Continue.
6. Type a secret question and answer. Click Send invitation.

Note: If needed, send the answer to the secret question to the care manager in a separate email.

7. Click OK.

The invited care manager will receive an email invitation.

ACCEPT A CARE MANAGER INVITATION


Invited care managers receive an email invitation.

1. In the "You're invited to MemorySparx..." email click Accept. The web browser opens.
2. Type the answer to the secret question. Click Continue. The account details appear.
3. Click Continue.
4. Type a password.
5. Click Sign up. The introduction pages appear.
6. Click Continue.

SIGN IN TO MEMORYSPARX CONNECT



After you accept an invitation, you can 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.

 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.


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  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 . Click Add to Home Screen.

4. Close the browser.

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

VIEW THE LEFT NAVIGATION MENU AND SWITCH BETWEEN CARE CIRCLES

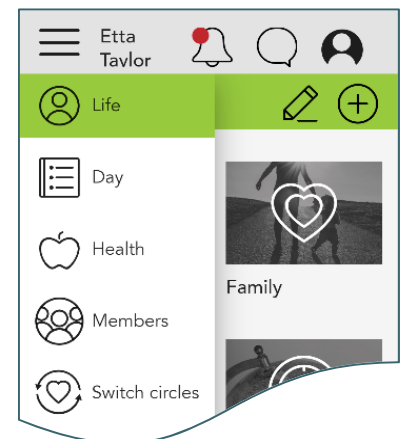
Use the left navigation menu to move between pages in MemorySparx Connect.



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



If you are a member of more than one care circle, click Switch circles in the left navigation menu to see a list of care circles. Click the name of a care recipient to open the care circle.



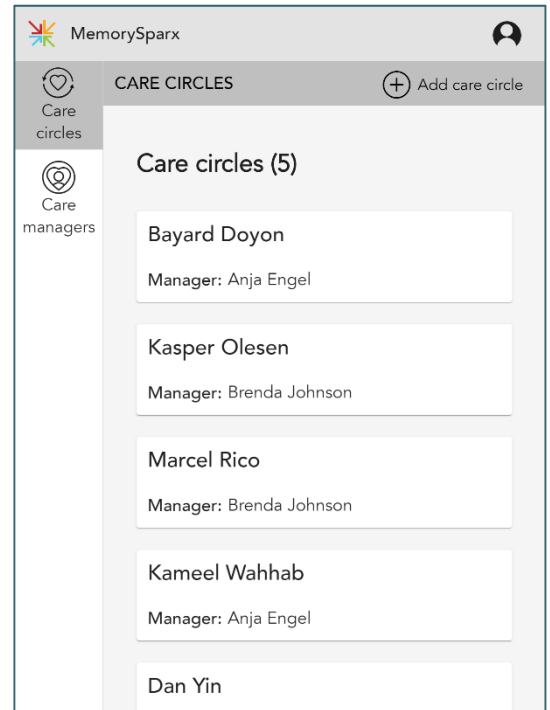
CREATE A CARE CIRCLE AND INVITE MEMBERS

The account manager or care manager can create a care circle. Before you create a care circle, obtain consent from the care recipient or their legal delegate.

You can invite circle members when you create the circle, or if you want to add some content before you invite members, you can create the circle and invite members later.

1. Sign in to MemorySparx Connect as an account or care manager.
2. On the Care circles page, click Add care circle.
3. Type the first and last name of the care recipient. Click Continue.
4. On the Invite care recipient page, choose one of the following options:
 - To send an invitation to the care recipient now, click Invite now.
 - a. Type the email address for the care recipient. Click Continue.
 - b. Set permissions for the care recipient. Click Continue
 - c. Type a security question for the care recipient to answer when accepting the invitation. Click Send invitation.
 - d. Optionally, edit the email message text that the care recipient will receive. Click Continue.
 - e. Click Ok.
 - To send an invitation to the care recipient later, or if you do not want to invite the care recipient at all, click Invite later.
5. On the Invite care partner page, choose one of the following options:
 - To send an invitation to the care partner now, click Invite now.
 - a. Type the email address for the care partner. Choose their relationship to the care recipient. Click Continue.
 - b. Type the first and last name of the care partner. Click Continue.
 - c. Set permissions for the care partner. Click Continue.
 - d. Type a security question for the care partner to answer when accepting the invitation. Click Send invitation. The Invitation sent page appears.
 - e. If you are finished adding care partners, click Ok. If you would like to add another care partner, click Invite another care partner.
 - To send an invitation to the care partner later, click Invite later.

The new care circle appears in the Care circles list. Click a care recipient name to open the circle.



MANAGE CHANGES TO A CARE CIRCLE

Account managers can make changes to all care circles. Care managers can make changes to the care circles that they create. Care partners can add and manage other partners in a circle, and edit care recipient permissions if they have permission to do so. See [Role and permissions overview](#) on page 3 for more information.

MANAGE CIRCLE MEMBERS AND MEMBER PERMISSIONS

In a care circle, click Members to see who has access to the circle.

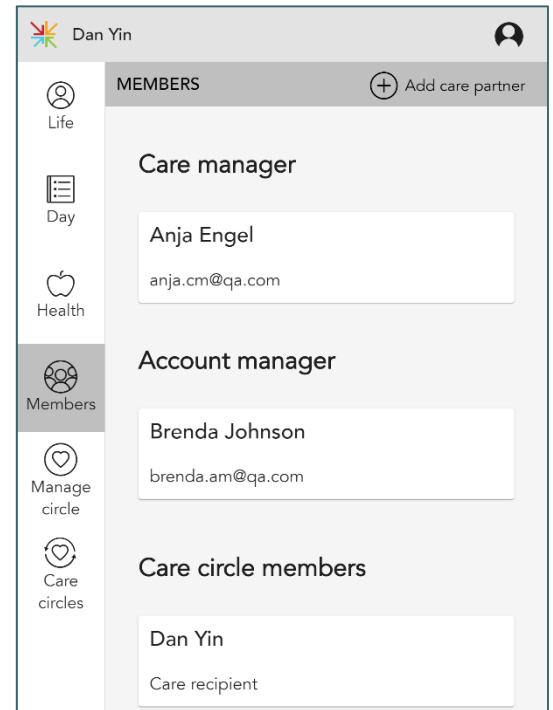
On the Members page, account managers, care managers, and care partners with permission can manage circle members or click a member name to manage member permissions.

Changes made to a care circle member only apply to the current circle.

ADD A CARE PARTNER TO A CARE CIRCLE

Account managers, care managers, and care partners with permission can add a care partner to a care circle.

1. On the Members page, click Add care partner.
2. Type the email address for the care partner. Select their relationship to the care recipient. Click Continue.
3. Check the boxes to set permissions for this care partner.
4. Type a security question for the care partner to answer when accepting the invitation. Click Send invitation.
5. Click OK.



INVITE A CARE RECIPIENT TO A CARE CIRCLE LATER

If the care recipient was not invited to a care circle when the circle was created, the account manager or care manager can invite the care recipient later.

1. On the Members page, click the care recipient name.
2. Click Invite.
3. Type an email address for the care recipient.
4. Set permissions for the care recipient. Click Continue
5. Type a security question for the care recipient to answer when accepting the invitation. Click Send invitation.
6. Optionally, edit the message that the care recipient will receive. Click Continue.
7. Click Ok.

RESEND AN INVITATION TO A CARE PARTNER OR CARE RECIPIENT



If a care partner loses their email invitation, or if it expires after 30 days, the account manager care manager, or care partner with permission, can resend it.

If a care recipient loses their email invitation, or if it expires after 30 days, the account manager or care manager can resend it.

1. On the Members page, click the name of a care recipient or care partner.
2. Click Resend Invitation.


EDIT PERMISSIONS FOR A CARE PARTNER

Account managers, care managers, and care partners with permission, can edit permissions for a care partner.

1. On the Members page, click a care circle member.
2. Click Edit .
3. Select a relationship to the care recipient (ex. family member)
4. Check the boxes to block health content or chat.
5. Check the boxes to choose whether this care partner can do the following:
 - Add and manage care partners
 - Edit care recipient permissions
6. Click Done .



REMOVE A CARE PARTNER FROM A CARE CIRCLE

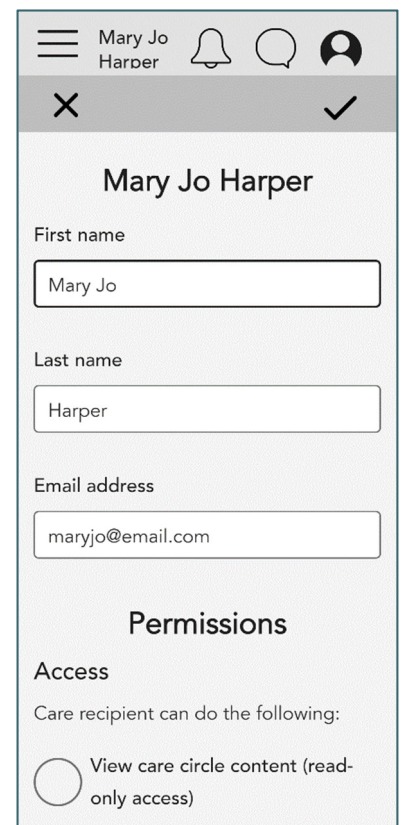
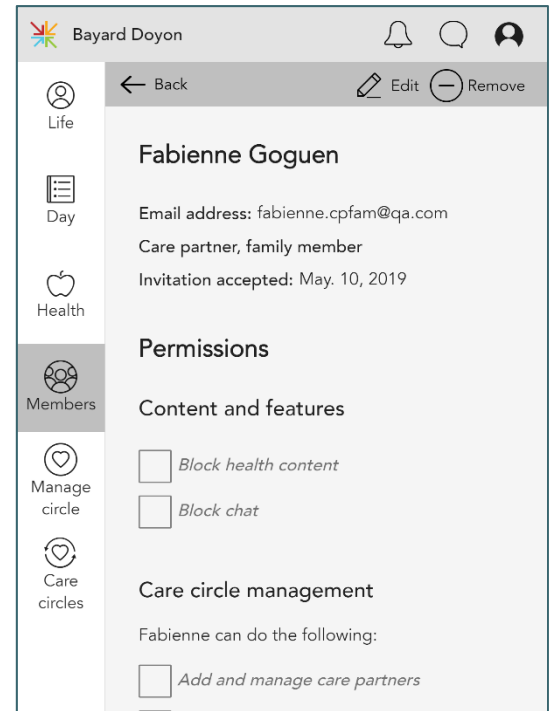
Account managers, care managers, and care partners with permission, can remove a care partner from a circle. Removed care partners will no longer have access to the care circle, but they will continue to have access to other circles they are a member of.

1. On the Members page, click a care circle member.
2. Click Remove .
3. Click Remove member.

EDIT ACCOUNT DETAILS AND PERMISSIONS FOR A CARE RECIPIENT

Account managers, care managers, and care partners with permission, can edit account details and permissions for a care recipient if that care recipient has been invited to their own circle.

1. On the Members page, click the care recipient name.
2. Click Edit .
3. Change the email address or name.
4. Check the boxes to choose whether this care recipient account can do the following:
 - View, add, edit, delete care circle content.
 - See their own health information.
 - Sign out after 60 minutes of inactivity.
5. Click Done .



MANAGE CIRCLES

CHANGE THE CARE MANAGER FOR A CIRCLE

Account managers can transfer the care manager role to another care partner in the circle. After the transfer, the previous care manager will still have access to the circle as a care partner. If the previous care manager was also the account manager, they can continue to access the circle as account manager.

1. In the Care circles list, click a care recipient name.
2. Click Manage circle.
3. Click Edit.
4. In the drop down, select a new care manager.
5. Click Done ✓.

DELETE A CARE CIRCLE

Account managers and care managers can delete a care circle so that members can no longer access the content. To permanently remove care circle data from MemorySparx Connect, contact support@memorysparx.com.

1. In the Care circles list, click a care recipient name.
2. Click Manage circle.
3. Click Delete.
4. Click Delete circle.

RESEND AN INVITATION TO A CARE MANAGER

If a care manager loses their email invitation, the account manager can resend it.

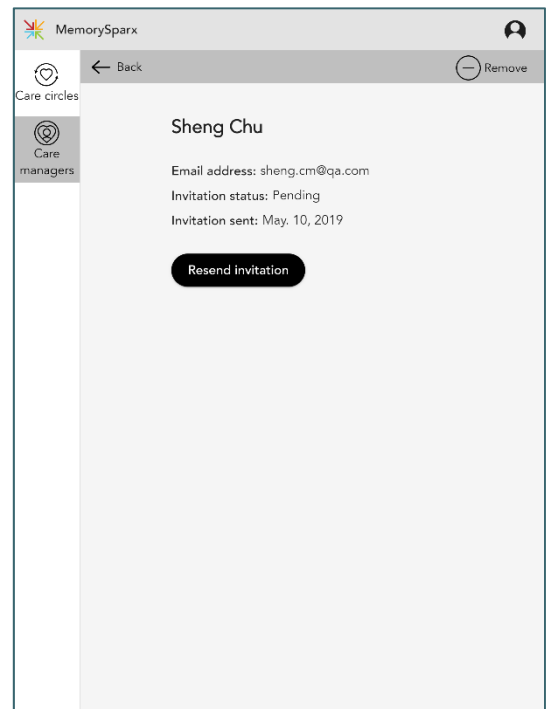
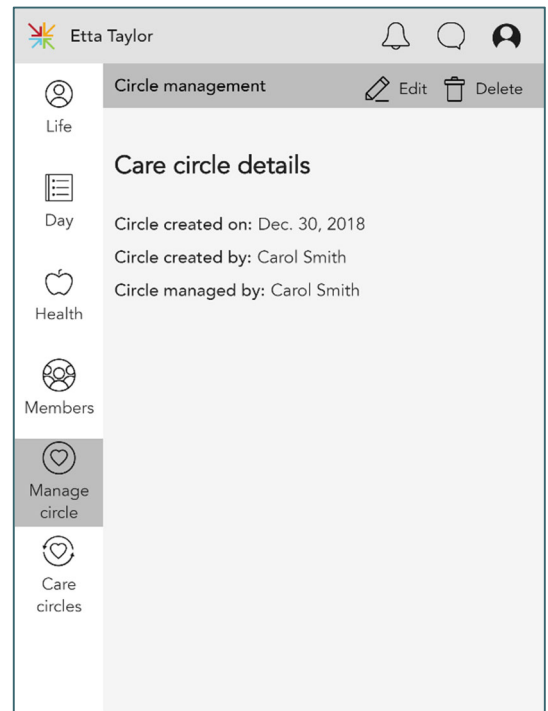
1. Sign in to MemorySparx Connect as an Account Manager.
2. Click Care managers.
3. Click a Care manager name.
4. Click Resend invitation.

REMOVE A CARE MANAGER

Account managers can remove care managers from the organization.

Before you remove a care manager verify that you have changed the care manager for each circle in your organization to someone else.

1. Sign in to MemorySparx Connect as an account manager.
2. Click Care Managers.
3. Click the Care Manager name.
4. Click Remove care manager.

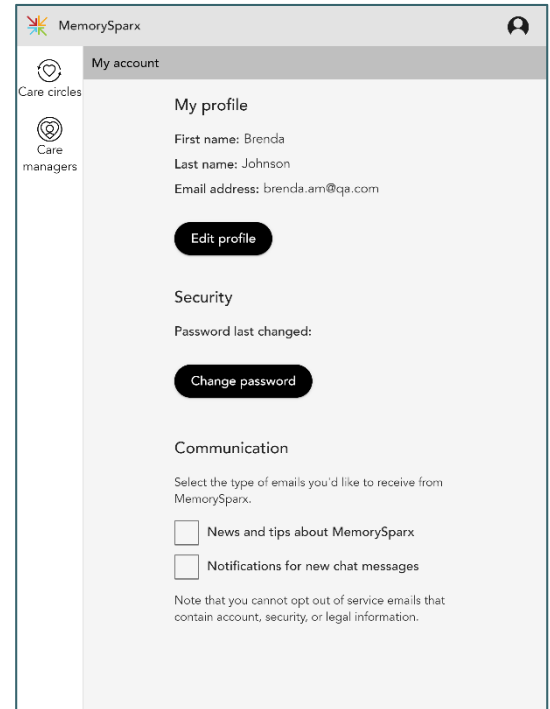


CHANGE THE ACCOUNT MANAGER FOR YOUR ORGANIZATION

If the current account manager is available to help with the transition, follow the steps below.


1. Sign in to MemorySparx Connect as the account manager.
2. Click the My account icon in the top right corner of the screen.
3. Click My account.
4. Click Edit profile.
5. Replace your name and email address with the name and email address of the new account manager. Click Done ✓.
6. Advise the new account manager to visit app.memorysparx.com/forgotpassword where they can request a password reset email be sent to their email address.

If the existing account manager is not available to help with the transition, contact support@memorysparx.com to request a change to the account manager for your organization.



CHANGE YOUR OWN ACCOUNT INFORMATION

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

7. Click the My account icon  in the top right corner of the page.
8. Click My account.
9. Choose 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.