

3/16/23



# Q1 User Group

## Spring into Success

Info you should know for 2023

# Housekeeping



## Mute

All participants are muted upon entry



## Recording

Today's webinar is being recorded



## QR Codes

Scan the QR codes in our Product section for more information!



## Survey

Please complete the survey at the end of today's webinar.



## Q & A

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### Zoom feature



Use the Q & A feature to post your questions to the Exym team.

### Question content



Questions should be general (not specific to your organization or an open ticket)

### Answers



We'll do our best to answer as many questions as we can today. If we don't get to yours, we'll follow up post-user group with an answer



## TODAY'S AGENDA

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- Welcome & opening remarks
- KCare staffing updates
- 2023 training opportunities
- Help Center updates
- Product spotlight
- CalAIM town hall
- Customer success





# Welcome

CEO, Katie Cortes





# Staffing Updates

2023



# X Staff Updates



**SALIM  
MOHAMMED**

VP, PRODUCT



**JASMINE  
HASLER**

ACCOUNT  
EXECUTIVE



**AL  
ORLANDO**

ACCOUNT  
EXECUTIVE



**DANINE  
LIVINGOOD**

TECHNICAL  
SERVICES  
MANAGER



**TAWANNA  
CHAPMAN**

IMPLEMENTATION  
SPECIALIST



**KRISTEN  
TAYLOR**

CONTENT &  
TRAINING  
SPECIALIST

**X**Coming Soon



**CUSTOMER SUCCESS MANAGER**

(AKA ANOTHER JOSE VALLE!)





Training & Events Plan



# TRAINING OPPORTUNITIES

2023

Monthly Webinar



Monthly webinar. Varying topics presented by our Exym team members.

Quarterly User Group



Quarterly virtual webinars. Panel comprised of KCare team members to provide updates and keep Exym SAs in the know.

Regionals (\$)



Bi-annual in-person events hosted by our Content & Training and Customer Success teams.

KCare Academy



On demand, self-guided basic & SA trainings. Additional course content planned!



# HIGHLIGHTS

MAY



## Monthly Training

First monthly virtual training opportunity!

AUGUST



## Regional (\$)

First Exym Regional in LA!

2024



## Conference (\$)

First KCare national conference with product specific tracks!





Help Center Updates



Please provide a detailed explanation of your question or the problem you are experiencing.

WARNING: If this refers to a specific activity, note, claim, or group, click the [?] icon that appears on the Activities page to create a ticket.

If you need data modified, such as a note returned, activity deleted, or diagnosis changed, please contact your agency's system administrator.

Subject:

Cc:

Can Cc: up to  
10 users

Attach screenshots, documents, or other supporting information: (maximum number of attachments is 5)

No file chosen

Description:

Can attach up to 5 files  
(no more than 5 GB total)

## Support Ticket Form: New Features

- CC people within the organization
- Attach supporting files



## Help Desk Knowledge Base Redesign

- Better organized content
- More self-help solutions





## Product Spotlight



# PRODUCT OVERVIEW

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## *Building iteratively*

- New VP of Product intro
- Feature releases → **What** we are going to deliver  
→ We have made some mistakes been trying to do too much
- Predicting timelines → **When** things are coming  
→ We haven't been great at predicting but we will get better
- Building iteratively → Focus on **smaller and faster** releases  
→ Focus on getting things in your hands and getting feedback





# SSO (SINGLE SIGN-ON)

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***SSO is live! Start using SSO today***

- We have introduced SSO (Single Sign-On)
  - Simplifies the login process
  - Improves security
  - Will be required for future product enhancements
- We are encouraging all agencies to use it
  - Currently support Microsoft, Google, and Email
  - Looking to have all agencies on SSO by end of Q2



# FORMS

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***KCare Forms is the new form-builder experience we are building***

## Admins

- Build true to source forms by uploading an existing PDF form
- Create custom, ad-hoc web forms

## Clinicians

- Complete documentation that looks more familiar to them
- Have built-in guidance that removes the guesswork

## Supervisors

- Improved workflow for commenting and returning forms



# FORMS

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## Currently in Beta

- Approval workflows
- Commenting between Clinicians and Supervisors
- Automatic population of Clinician/Supervisor signature once form is approved
- Early access to some core forms (built by Exym)

## Currently Being Worked On

- Data integration (pre-populate data from Exym into the form)
- Form approval based on individual roles
- Integrating the new form builder with a better user experience

## Coming Later

- Reporting
- Electronic Signatures

Use this QR code to join our Forms beta program:



# DEMO: CLINICIAN WORKFLOW

Exym HOME

Log Out oliver.piscione | Help | New Design Preview

Home > Clients > Activities > Group Activities > Documents > Support > Reports > NEW My Forms

System Messages

test global message  
Posted by Exym Support on Friday, December 3, 2021 at 7:58:12 AM  
test global message aaaa

My Month-To-Date Productivity & Favorite Reports

Productivity Report for March 1-14, 2023

Staff Member	This Month's Target	Units Completed Month-To-Date			Notes Due
	Total Due	Total Due MTD	Actual MTD	Difference	
Oliver Piscione	1000	450	0	-450	0

My Schedule

Show: ☐ Scheduled Only ☐ Completed Only ☒ Both

View monthly calendar

March 2023								
<<	Sun	Mon	Tue	Wed	Thu	Fri	Sat	>>
12		13	14	15	16	17	18	

[NS] = No Show [C] = Completed activity, still in progress [S] = completed activity, Submitted for approval [QA] = completed activity, in QA [A] = completed, Approved activity

My Memos

Show: 

all

 memos From the Last 30 Days that are Not Archived to Anyone from Anyone

There are no memos matching the filter criteria.

NEW My Forms

Client	Document	Status	Created By	Effective Date	
<a href="#">Open</a>	Davis, Anthony	Immediate / Same Day Services Assessment	In Progress	Piscione, Juan	3/6/2023

# DEMO: SUPERVISOR WORKFLOW

Exym HOME

[Log Out Exym.Admin11](#) | [Help](#) | [New Design Preview](#) ☐

[Home](#) > [Clients](#) > [IBHIS](#) > [Activities](#) > [Group Activities](#) > [Documents](#) > [Support](#) > [Payers](#) > [Reports](#) > [Accounting](#) > **NEW** [My Forms](#) > [Admin](#) >

## System Messages

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## My Month-To-Date Productivity & Favorite Reports

### Productivity Report for March 1-14, 2023

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Oliver Piscione	1000	450	0	-450	0
Q-EXYM-Juan Piscione	600	270	0	-270	1

Report	Description	Fav
<a href="#">All Activities By Clinician</a>	Lists scheduled and completed activities by clinician and date range; displays Session Time and Other Time for each activity with overall totals. Can be filtered by type of note.	<input checked="" type="checkbox"/>

## My Schedule

Show: ☐ Scheduled Only ☒ Completed Only ☐ Both

[View monthly calendar](#)

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## My Memos

Show: ☐ Deleted Memos  memos From the Last 30 Days that are  to  from

There are no memos matching the filter criteria.

**NEW** [My Forms](#)



## **Los Angeles Network for Enhanced Services**

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- **Prioritizing whole person care** via Health Information Exchange (HIE) Health Information Organization (HIO)
  - With Hospitals, Clinics, Medical Groups, Behavioral Health Providers, Health Plans, Primary Care Specialists, and more
- California's Health and Human Services' [Data Exchange Framework](#) (DxF or AB133) is the state's first state-wide data sharing agreement
  - Policies to abide by are in the [Data Sharing Agreement](#) (DSA)
  - Jan 2024 is the implementation date
- Admit Discharge Transfer (ADTs)
  - Ready during Q2
  - Continuum of Care Document (CCDs) will follow next

Use this QR code to learn more about LANES



# ANALYTICS & REPORTING

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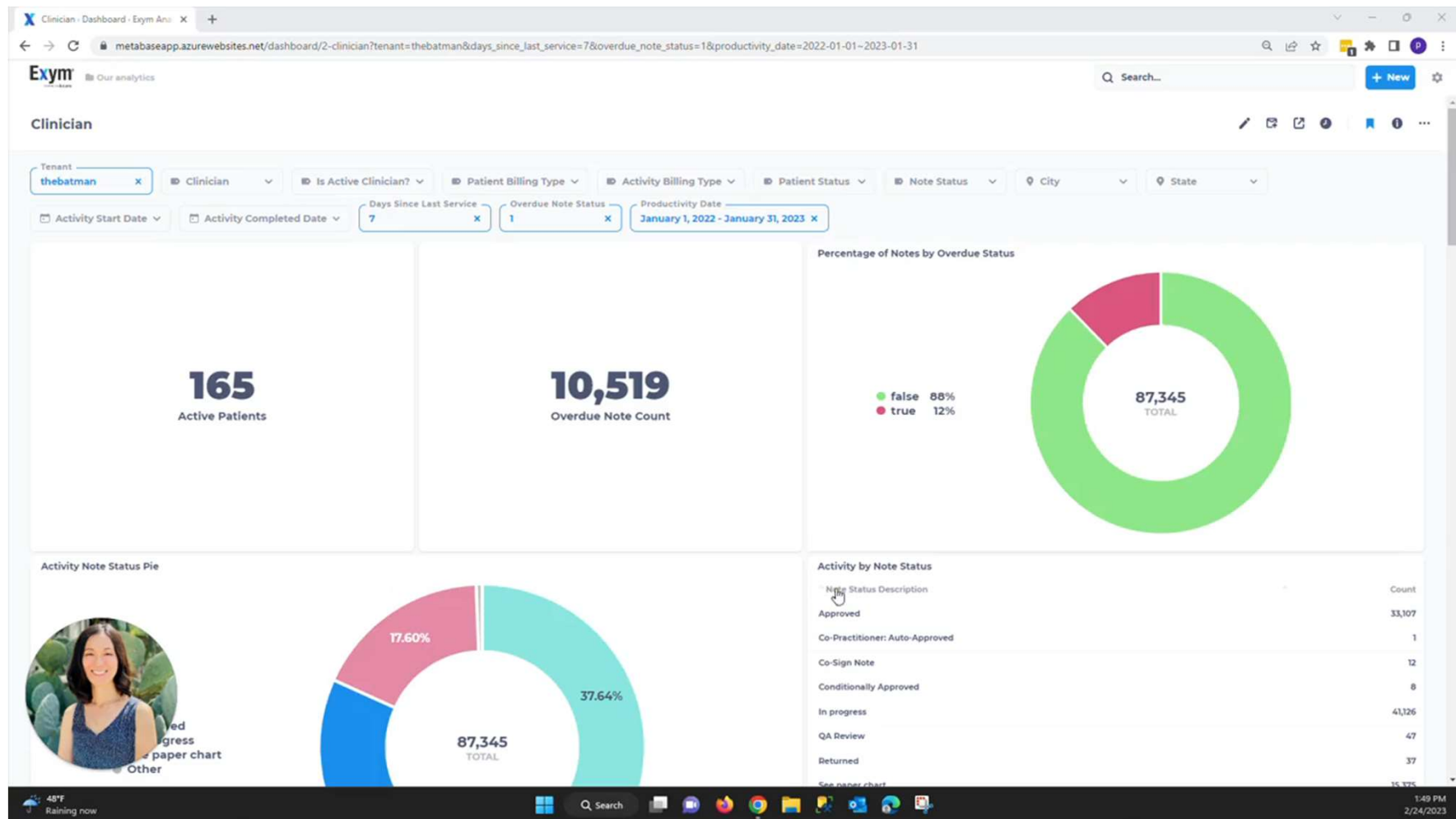
## ***Next generation Exym Analytics is being built***

- Upgraded module with built-in drag and drop dashboard capabilities (current version is known as Analytics/Periscope)
- We are working on a beta release now
  - Clinician Dashboard will be the first available
  - Supervisor, Admin, Accounting, QA and CANS/PSC dashboards will follow

Use this QR code to  
join the Analytics  
beta program



# DEMO: CLINICIAN DASHBOARD





# PRODUCT COUNCIL

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We're Building a Product Council

**What is a  
Product  
Council?**

- We want to create a group of users that will give us direction and feedback on our product and roadmap

**Who are we  
looking for?**

- A mix of different users (clinicians, supervisors, admins) from different types and sizes of organizations

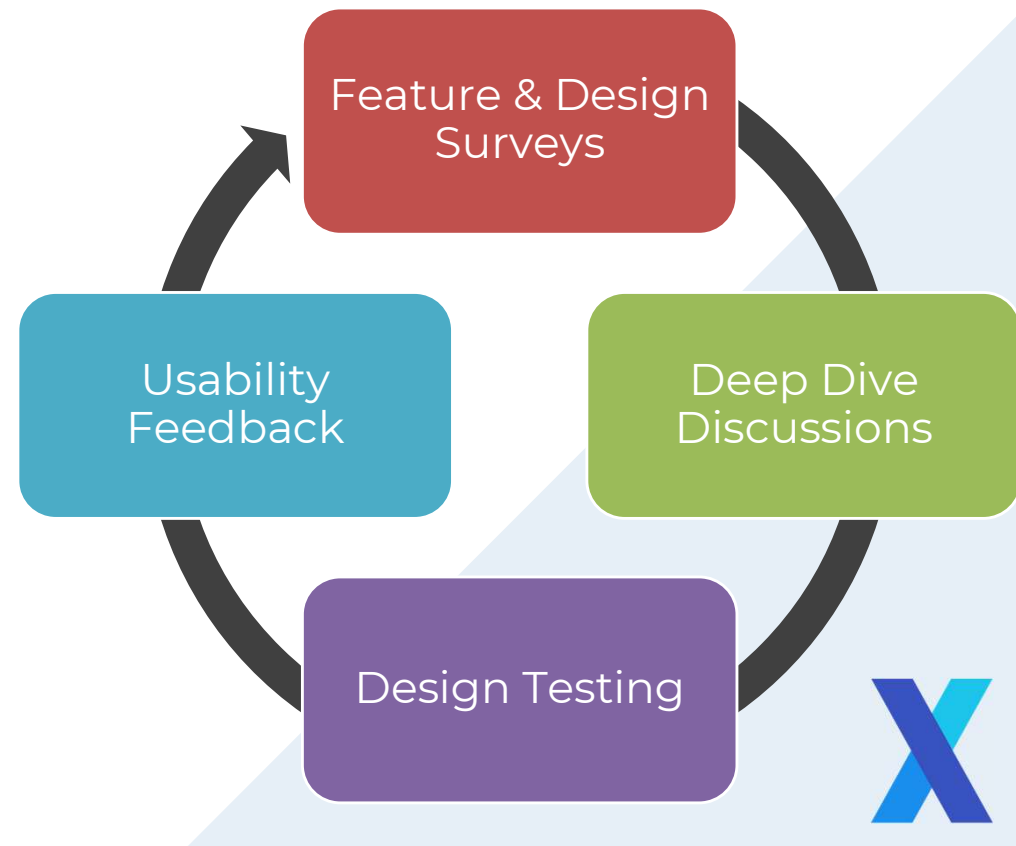


# PRODUCT COUNCIL

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## Your Input Matters

- Help guide product strategy
- Be the first to provide feedback
- Participate in beta group releases for new capabilities
- Provide initial feedback



# PRODUCT COUNCIL

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**Based on  
Your  
Capacity**

- Open-ended feedback: Ideas to understand what you are looking for
- Directional feedback: Identify specific pain points on upcoming priorities
- Validation: Usability testing and prioritization of functionality



# PRODUCT COUNCIL

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Join the Exym Product Council!

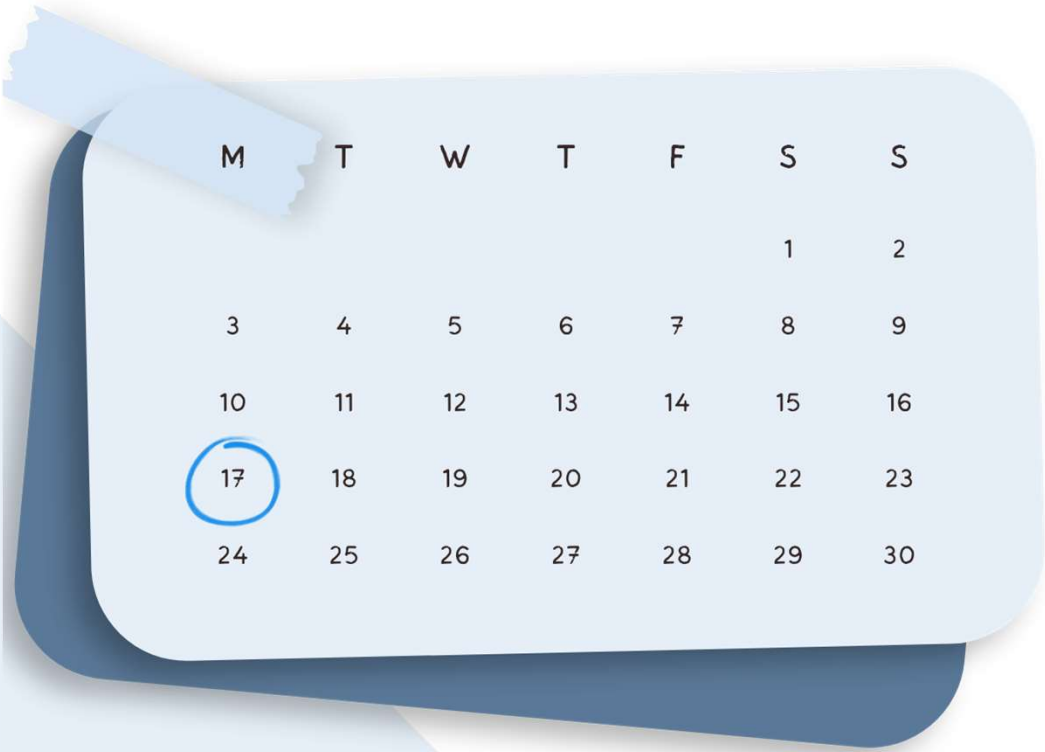




CalAIM Town Hall



# Save the Date



Registration Link with Survey





**Exym**<sup>®</sup>  
Customer Success





# Customer Success

- **MAXIMIZE  
EFFICIENCY**

- **IMPROVE USER  
EXPERIENCE**

- **DEDICATED CONTACT  
& ADVOCATE**

- **JOSE VALLE**  
**CUSTOMER SUCCESS MANAGER**  
[Jvalle@k-care.com](mailto:Jvalle@k-care.com)  
**737-285-3909**







**Thank you!**