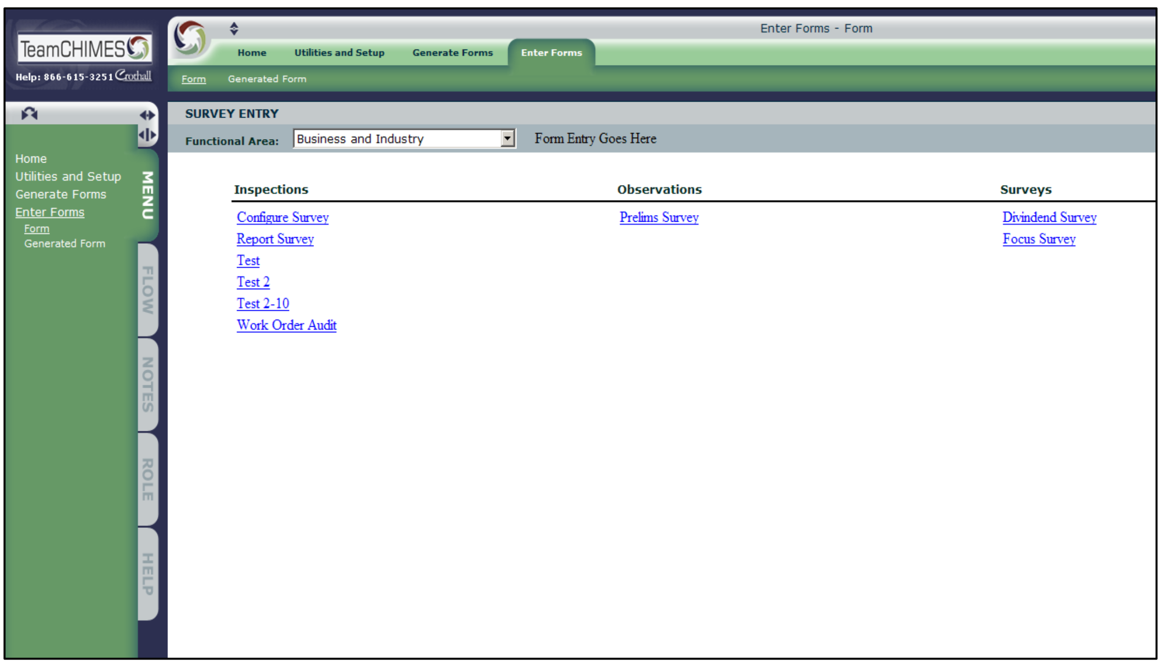
TeamCoach 2.0 User's Guide

Section 1: TeamCoach Introduction

What is TeamCoach?

TeamCoach is a web-based survey tool that is used to gauge Crothall's performance at the hospitals and other facilities that we serve. Because the tool is web-based, scores from each site can be viewed by Crothall's upper level management and the company's performance can be benchmarked.

The system can generate QAs which are Quality Assessments of task performance, surveys which are interviews in which clients, customers, and patients are asked about service provided by Crothall and Observations which allow supervisors to rate employee performance.



New Features in Team Coach 2.0

Some of the new features and enhancements of TeamCoach V2.0 include:

- **Purely web-based** – No local installation or special firewall rules will be needed to access the application.

- **Solid Geography** – Users will select locations from dropdowns rather than free typing to allow for more consistent reporting
  - Geographies will be exported from TeamOps and imported to TeamCoach after verification from unit management.
- **Assignment of Forms to Locations** – This will enable users to generate specified and scheduled forms
  - Example: you will be able to schedule Department Evaluations to be sent periodically to department heads.)
- **Email URL Links for Online Form Entry** – Rather than collecting data on paper and manually entering responses, you can now email URL links so that the recipient can enter the data directly in TeamCoach through an online form.
- **TeamCoach Mobile** – Forms can be assigned to supervisors so that when they login to their PDA, they will be able to view their list of inspections, observations and surveys that need to be completed. Form entry can be done directly on the mobile device and uploaded to TeamCoach.
- **Updated Look and Feel** – Both the user interface and reports have been updated to improve appearance and user experience.

System Requirements

TeamCoach is a web-based application and can be accessed from any computer. Internet Explorer 7.0 or higher is recommended for optimum use the application.

Accessing TeamCoach

A valid User Name and password is required to access TeamCoach. TeamCoach can be accessed by entering the following web address into the computer's Internet Explorer Browser window:

https://coach.crothall.com

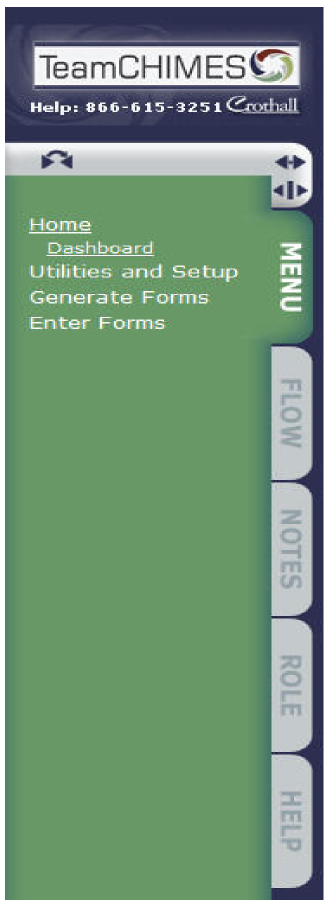
You may add this address to your Internet Explorer favorites or place a shortcut on your computers desktop to enable easy access.

TeamCoach will prompt you to login using the domain, **compass-usa**\ and your assigned Extranet ID and password. **(i.e. compass-usa\SmithJ)**

Important Note: For Crothall employees, your TeamCoach logon is your network or extranet logon. This is the same user ID and password combination that you use to log onto your e-mail or the first login for TeamFin. To request access to TeamCoach or any other Crothall application, download the IS Request Form from the My Crothall website (https://mycrothall.crothall.com).

Navigating in TeamCoach

On your first visit to the TeamCoach website, you will notice the menu bar at the on the left side of the screen. The menu bar will enable you to navigate between screens within TeamCoach. The main menu items are **Home, Utilities and Setup, Generate Forms,** and **Enter Forms.** If you want to access a specific menu area, select one of the main menu options. The menu items will expand or collapse when selected. The menu on the left can also be collapsed and expanded by the **double arrow** to add about an inch more viewable area.



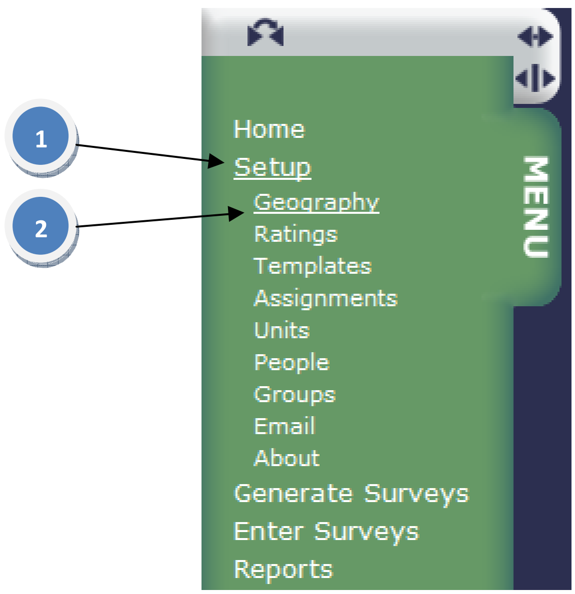
Important Note: TeamCoach was designed to be viewed at a computer monitor resolution of 1024x768. If a lower resolution (i.e. 800x600) is all that is available, TeamCoach can be used, but scroll bars will appear to allow you to view the majority of the screen. The lower portion of the screen may not be visible.

Section 2: Utilities and Setup

Before you can begin using TeamCoach there are some configuration steps that must be performed. This entails adding the geography, ratings, survey templates, survey assignments, units, and employees that are specific to your facility.

Geography – Configuring Your Facility

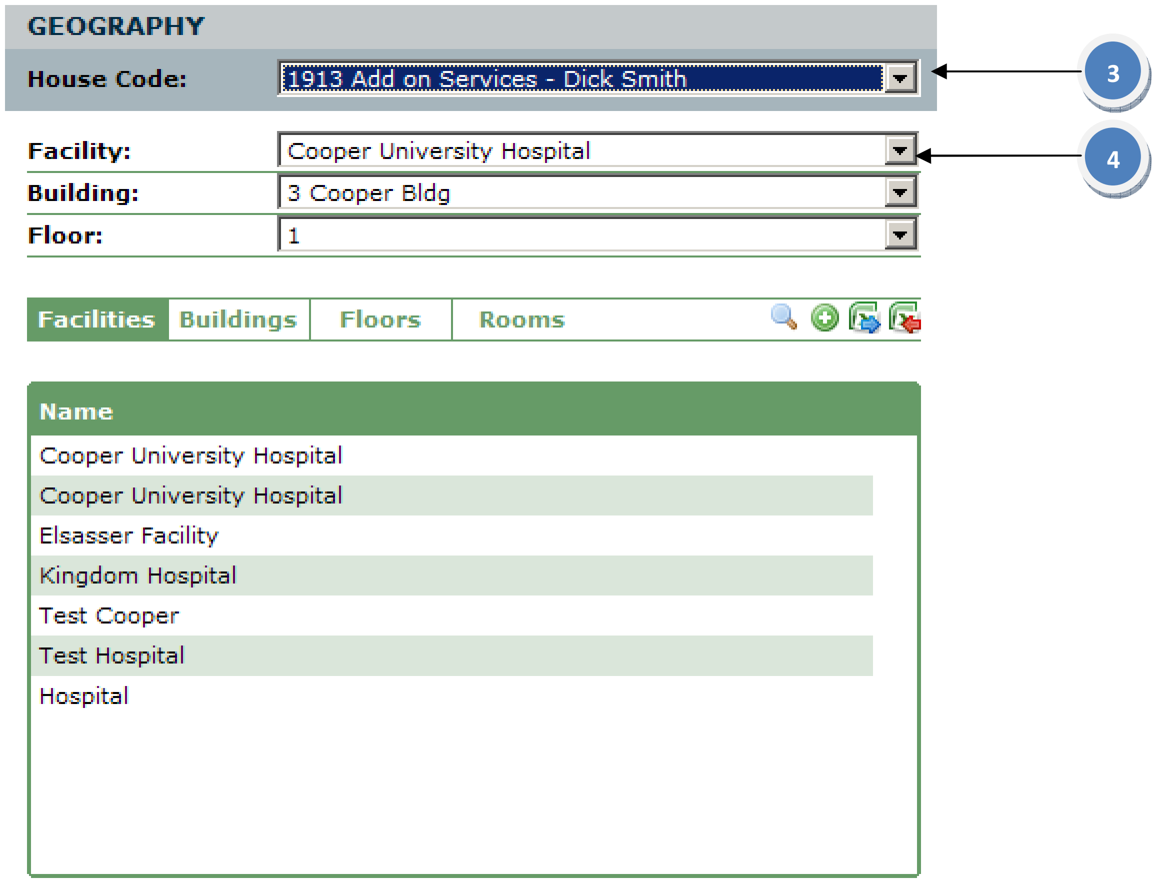
The Geography section of the system allows you to detail the buildings, floors and rooms in your facility. The highest level, the facility, will be created for you at the same time that your application logon is setup by the Crothall IS Department.



Important Note: When your site is initially setup, we can import your geography information from an Excel spreadsheet. If you are currently using another Crothall application that also utilizes geography, we can use that data to populate TeamCoach. Contact your IS business analyst for further details.

To begin recording your facility's geography complete the following steps:

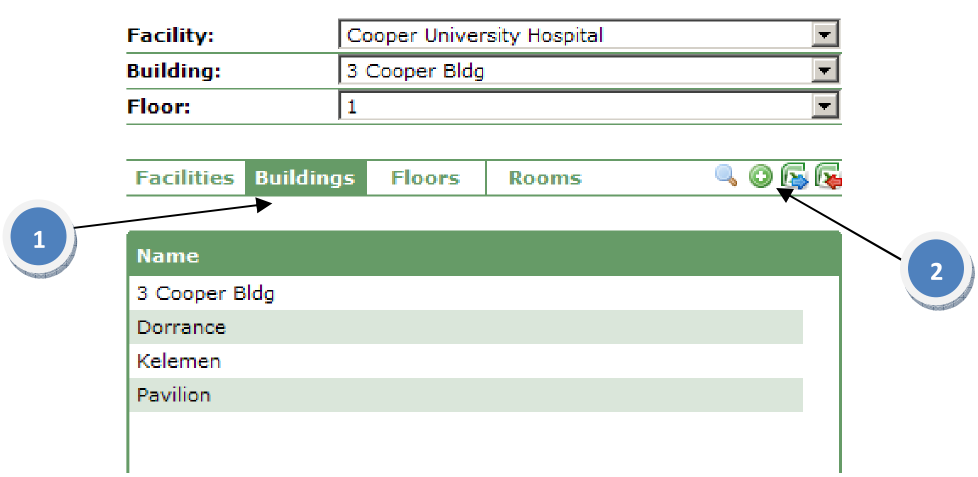
1. Select **Setup** from the menu bar on the left or at the top of your screen.
2. Select **Geography** from the menu bar on the left or at the top of your screen.



3. **House Code** - Select your House Code from the list of values.
4. **Facility** - Select your facility name from the list of values. This step will only be necessary if you have access to more than one facility.

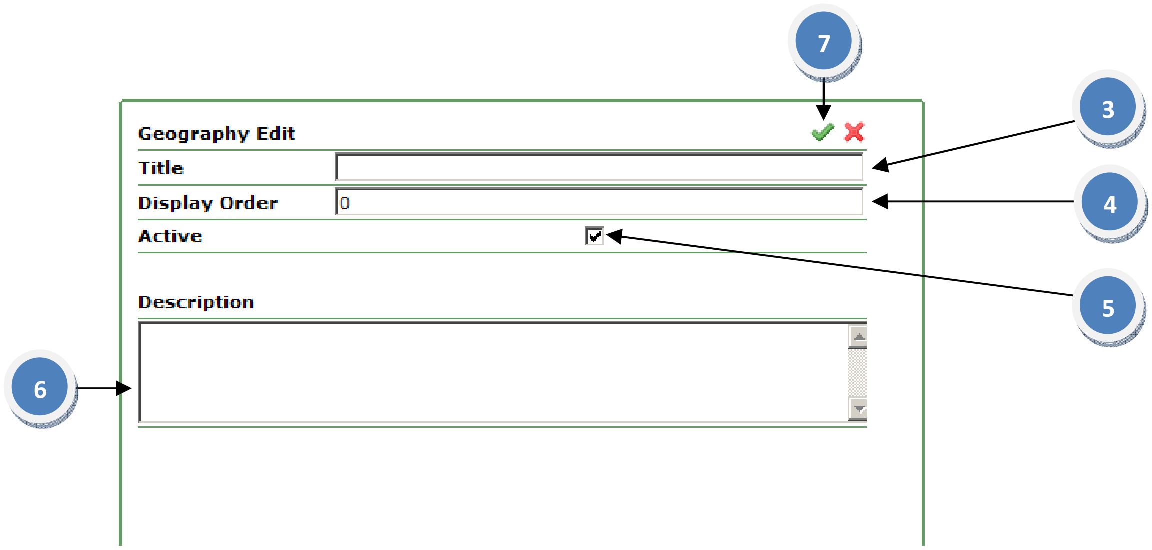
Adding a Building

Each facility can have multiple buildings.



To add a new building to the facility, complete the following steps:

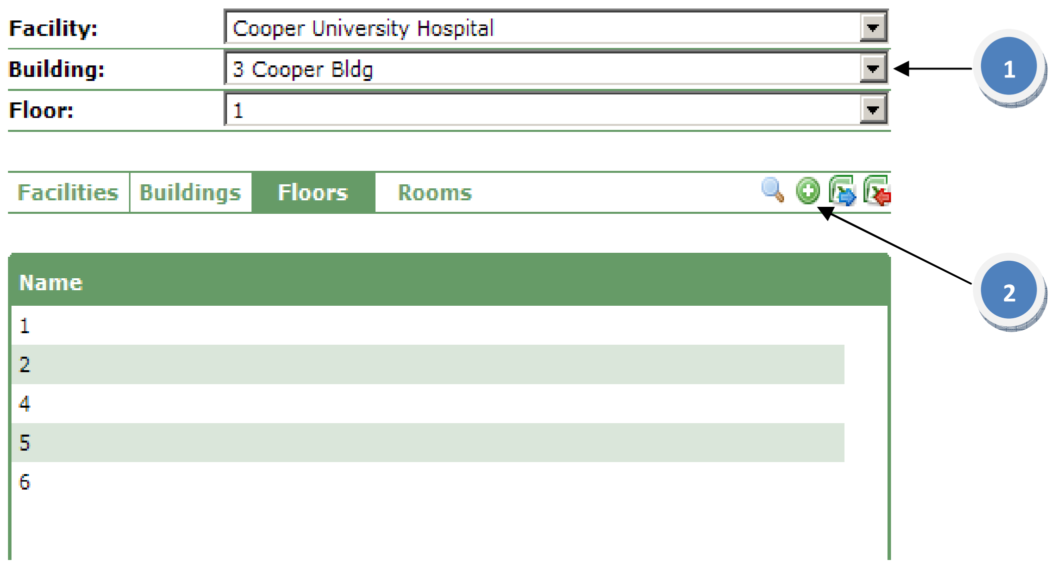
1. Click the **Buildings** button in the Geography Selection toolbar.
2. Click the **Add Geography** button next to the Building field.



3. **Title** – Enter the name of the building.
4. **Display Order (Optional)** – Enter a value for the Display Order. This value will determine in what order the floor will appear in the Geography section.
5. **Active Location** – When creating a new building this checkbox will be selected. To deactivate a building you can uncheck the Active box, by doing so the building and any geography associated to it such as floors and rooms will no longer be active.
6. **Building Description (Optional)** – Enter a description of the building.
7. Click on the **Update** button once you have completed the entry to save your work.

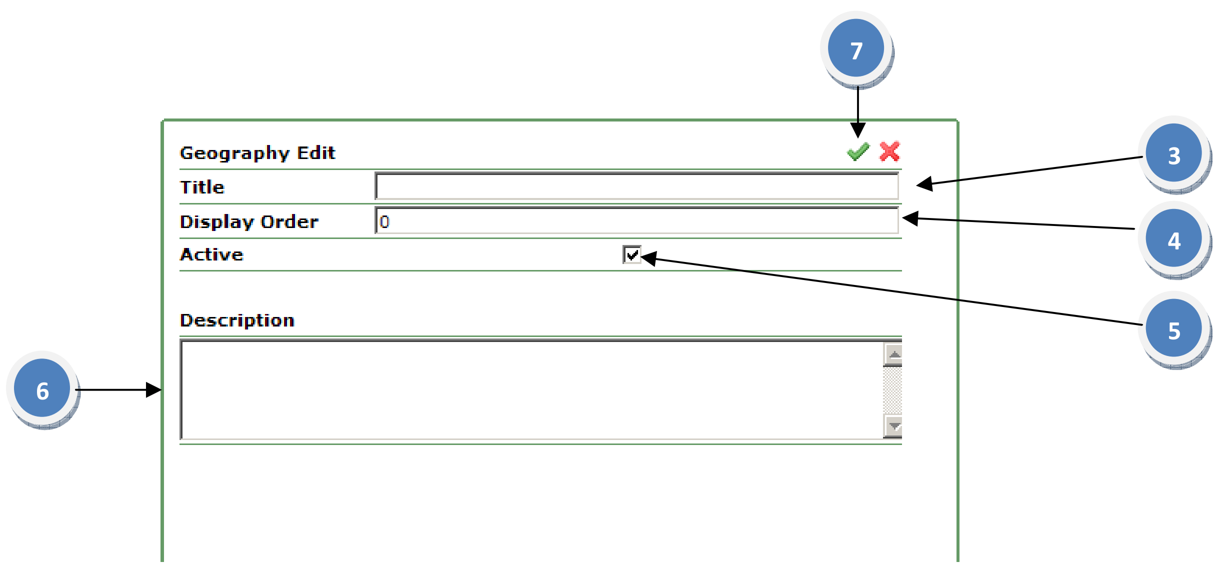
Adding a Floor

Each Building should have at least one floor associated with it.



To add a floor to a building, complete the following steps:

1. In the Building drop-down list, select the building where you want to add the floor.
2. Click on the **Add Floor icon** next to the floor field.

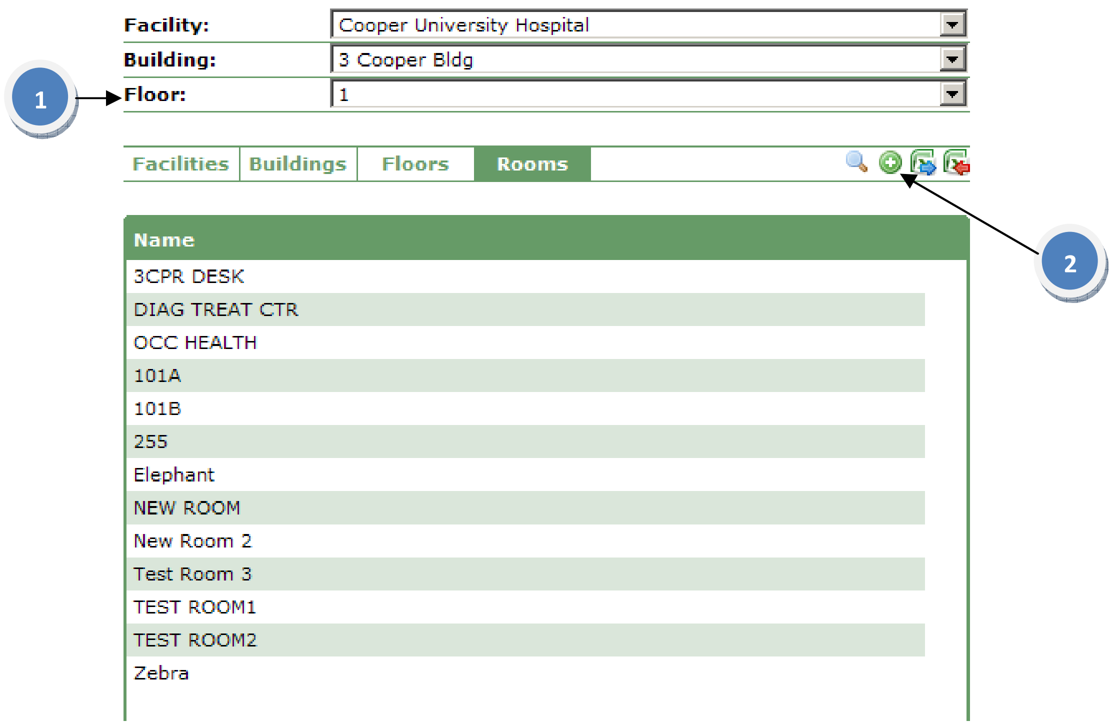


3. **Title** - Enter the name of the floor.
4. **Display Order (Optional)** - Enter a value for the Display Order. This value will determine in what order the floor will appear in the Geography section.
5. **Active Location** – When creating a new floor this checkbox will be selected. To deactivate a floor you can uncheck the Active box, by doing so the floor and any geography associated to it such as rooms will no longer be active
6. **Description (Optional)** - Enter a description of the floor.

7. Click on the **Update** button once you have completed the entry to save your work.

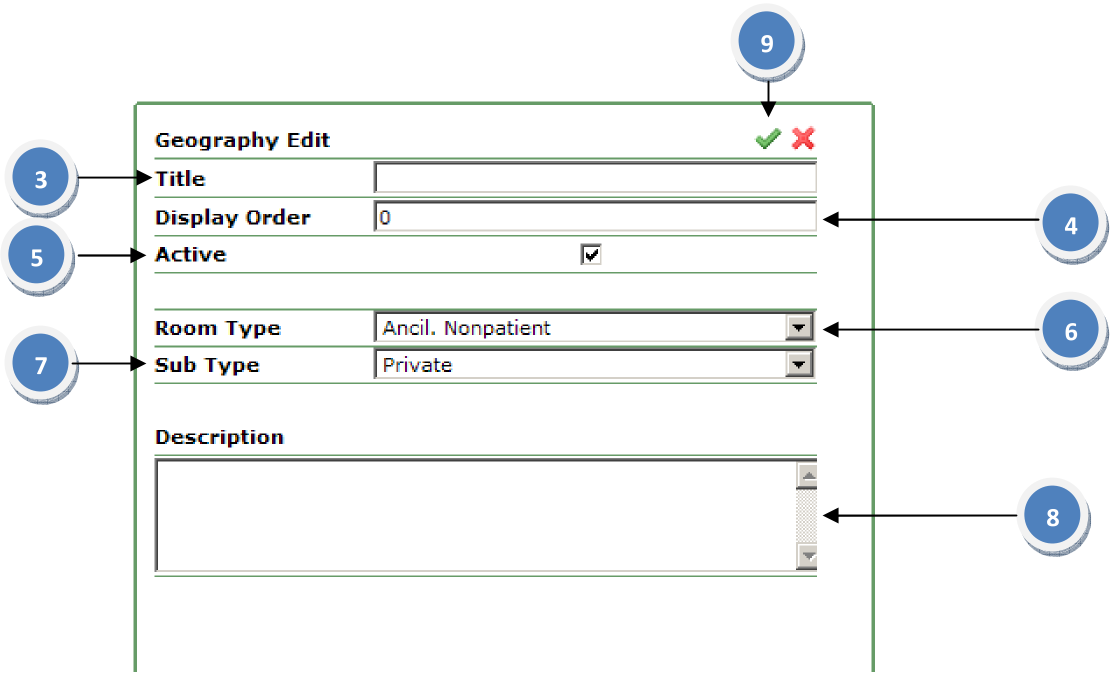
Adding a Room

Each floor should have at least one room associated with it.

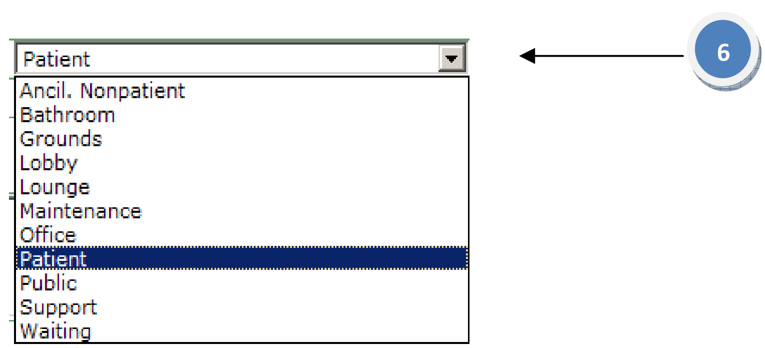


To add a room, complete the following steps:

1. In the **Floor** drop-down list, select the building where you want to add the room.
2. Click on the **Add Floor icon** next to the Room field.



3. **Title -** Enter the name of the floor.
4. **Display Order (Optional)** - Enter a value for the Display Order. This value will determine in what order the floor will appear in the Geography section.
5. **Active Location** – When creating a new room this checkbox will be selected. To deactivate a room you can uncheck the Active box, by doing so the room will no longer be active.
6. **RoomType** – The room type will default to Patient. Edit the room type as appropriate by selecting from the list of values, choices included: **Patient**, **Ancil. Nonpatient**, **Lobby**, **Lounge**, **Maintenance**, **Office**, **Public**, **Support**, **Waiting**, **Grounds**, **and Bathroom.**



7. **Room Sub Type** - If you chose a room type of patient, you will be given additional options to further classify the room. Select a sub-room type of **private** or **semi-private.** Any other room type will not yield a room sub type.
8. **Description (Optional)** - Enter a description of the room.
9. Click on the **Update** button once your have completed the entry to save your work.

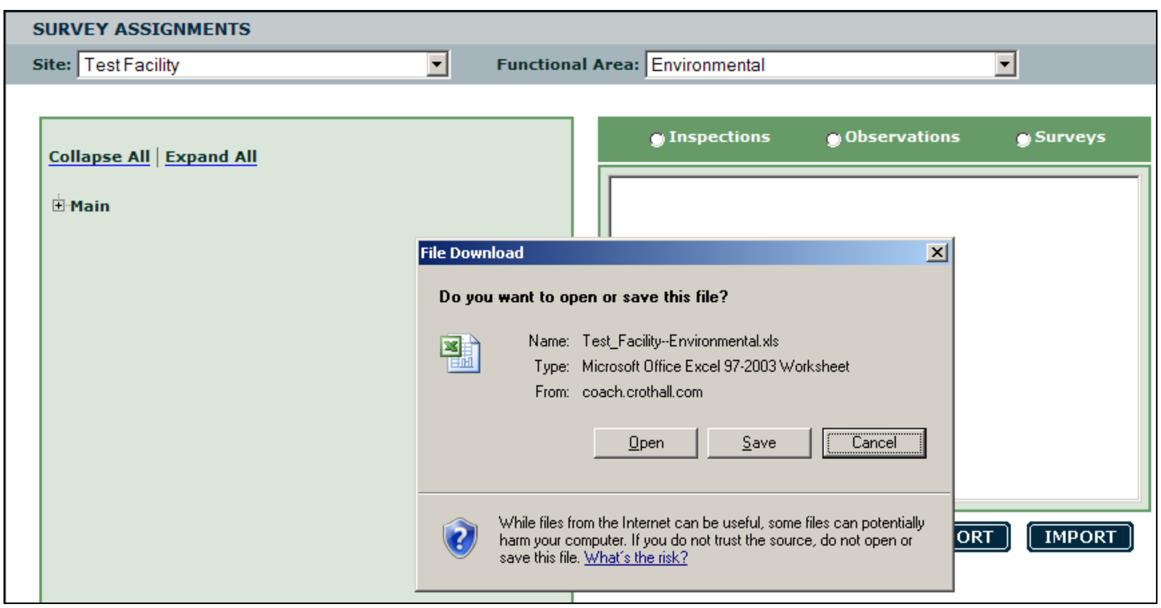
Important Note: TeamCoach will not allow you to change room names or delete rooms once they are created. If you do add a room that is incorrect, you can make the room inactive by un-checking the **active location** box in the room setup screen.

Assignment

In order to generate random forms, you must assign surveys to locations in the geography. You have the ability to assign one form of each type (inspection, observation and survey) to each location in the geography. Survey assignment can be done manually through the user interface or by importing assignments that are setup in Excel. Both methods are described below.

Assignment Export/Import

The assignment export/import feature can be used to do mass assignments or edits to existing assignments with less effort than manual assignments. The process consists of exporting the current assignment configuration to an Excel file, adding or editing assignments in the Excel spreadsheet, then importing the updated assignment file back into TeamCoach.



To Export the existing assignment configuration to Excel, complete the following steps:

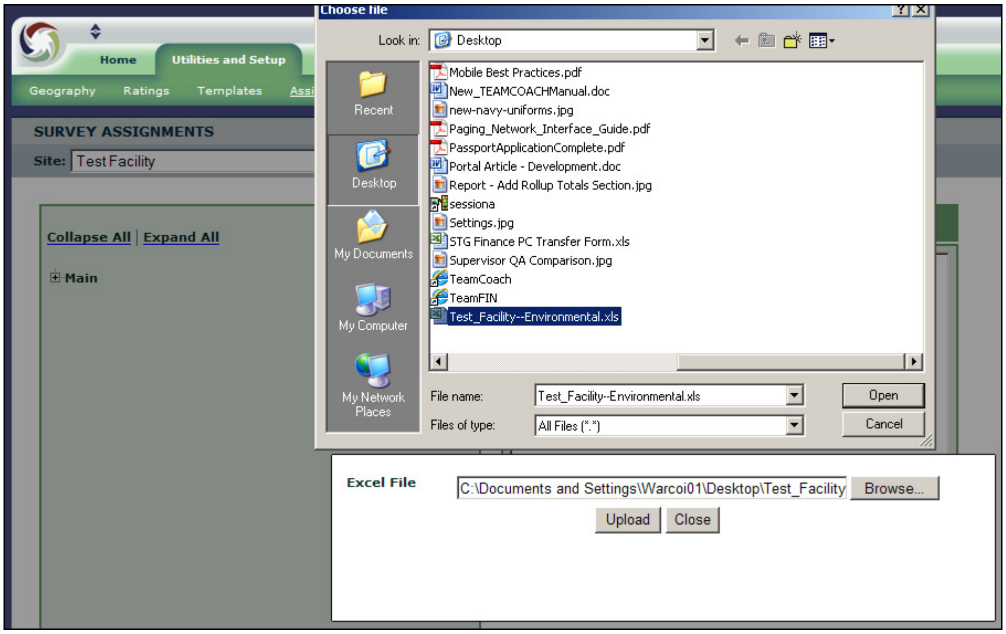
Site – Select your site from the drop list if it isn't already populated.
Functional Area – Select your functional area from the drop list if it isn't already selected.

Export – Click the Export button. You will receive a message asking to be patient while the assignment file is created.
Save – When the file is generated, you will see the pop-up message displayed in the screenshot above. Click Save and save the file in a convenient location such as your Desktop.

	A	B	C	D	E	F	G
1		**Building**	**Floor**	**Room**	**Inspection**	**Survey**	**Observation**
2		3 Cooper Building	1	3CPR DESK	2 - Bathroom QA	1 - Customer Survey	UNASSIGN
3		3 Cooper Building	1	DIAG TREAT CTR	2 - Bathroom QA	1 - Customer Survey	UNASSIGN
4		3 Cooper Building	1	OCC HEALTH	2 - Bathroom QA	1 - Customer Survey	UNASSIGN
5		3 Cooper Building	2	DOM	2 - Bathroom QA	1 - Customer Survey	UNASSIGN
6		3 Cooper Building	2	OB GYN 211	2 - Bathroom QA	1 - Customer Survey	UNASSIGN
7		3 Cooper Building	2	PED CTR	2 - Bathroom QA UNASSIGN 2 - Bathroom QA 3 - Classroom QA 4 - Conference Room QA 5 - Critical Area QA 6 - Office Area QA 7 - Public Area QA 8 - Resident QA	Customer Survey	UNASSIGN
8		3 Cooper Building	4	ORTHO CTR		Customer Survey	UNASSIGN
9		3 Cooper Building	5	EYE INST		Customer Survey	UNASSIGN
10		3 Cooper Building	5	TAP CLINIC		Customer Survey	UNASSIGN
11		Dorrance	1	MAIL RM		Customer Survey	UNASSIGN
12		Dorrance	1	MED LBR		Customer Survey	UNASSIGN
13		Dorrance	2	INFECT CTRL	2 - Bathroom QA	9 - Commercial Survey	UNASSIGN
14		Dorrance	2	LIFE SPRT	2 - Bathroom QA	9 - Commercial Survey	UNASSIGN
15		Dorrance	2	NURSE 222	2 - Bathroom QA	9 - Commercial Survey	UNASSIGN
16		Dorrance	2	NURSING ED PT CA	2 - Bathroom QA	9 - Commercial Survey	UNASSIGN
17		Dorrance	3	3 DORR	2 - Bathroom QA	9 - Commercial Survey	UNASSIGN
18		Dorrance	3	CARD OFF 3	2 - Bathroom QA	9 - Commercial Survey	UNASSIGN
19		Dorrance	3	CARDIOLOGY OFFICE	2 - Bathroom QA	9 - Commercial Survey	UNASSIGN
20		Dorrance	3	D333-DR	8 - Resident QA	9 - Commercial Survey	UNASSIGN
21		Dorrance	3	D333-WN	2 - Bathroom QA	9 - Commercial Survey	

To edit assignments or add new assignments to your site, complete the following steps:

1. **Open the file** – Find the file that you saved in the previous step and open it by double-clicking (you will need Microsoft Excel to open the file).
2. **Assign** – Each room at your site will appear in a separate row in the downloaded file. You have the ability to add a new assignment, unassign, or change existing assignments using the drop list under the survey type headings next to each location. Each room can be assigned 1 Inspection, 1 Survey and 1 Observation.
3. **Save** – Once all necessary changes have been made in the Excel file, save the file and remember where you save it as you will need to import the file back to TeamCoach.

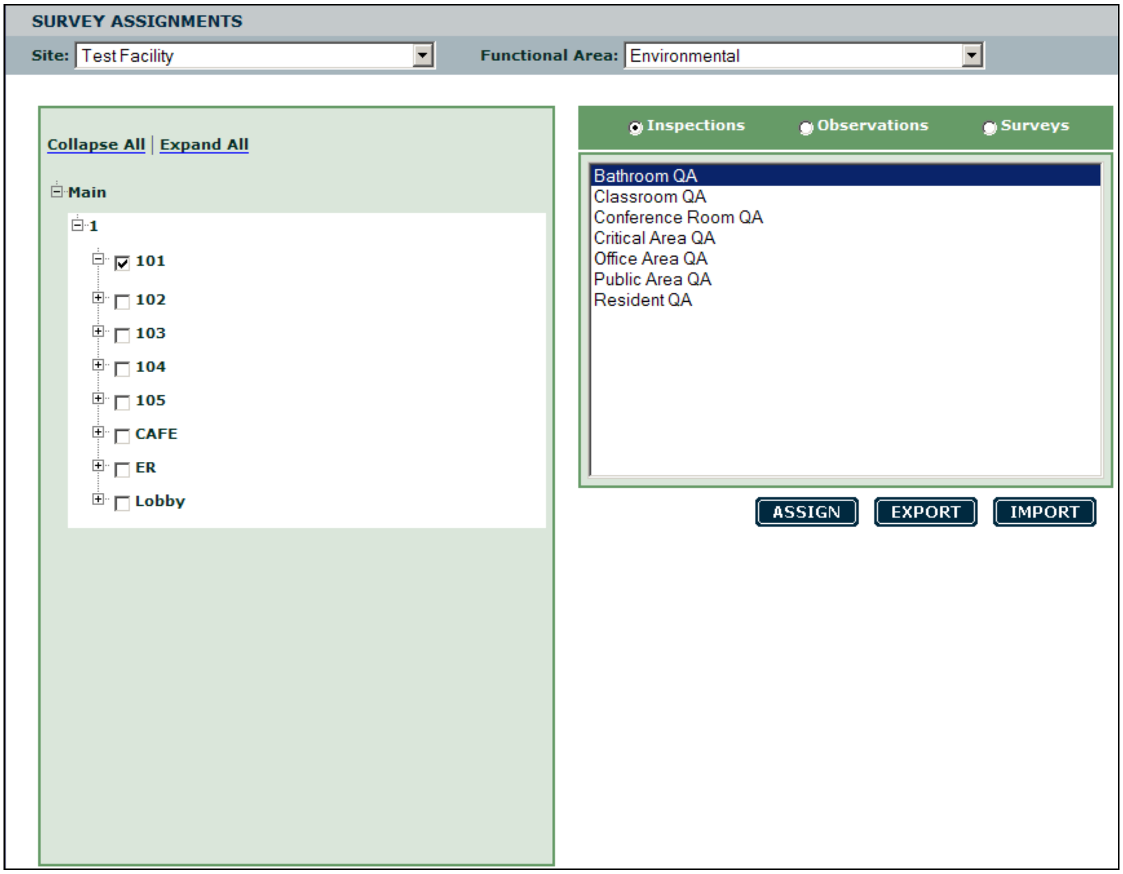


To import the updated assignment file, complete the following steps:

1. **Import** – Click on the Import button in the Survey Assignments screen.
2. **Browse** – Click on the Browse button to find the updated file that you saved. Double-click on the file or single-click and click Open to add the file location to the Upload window.
3. **Upload** – Click the Upload button to update TeamCoach with the new assignment file.
4. **Verify** – Expand all geography to verify that the changes you made were uploaded properly.

Manual Assignment

Manual survey assignments will be used mostly when making adjustments to existing assignments or adding small numbers of new assignments. Initial setup of survey assignments will typically be done using the Import/Export feature which will be described following this section.

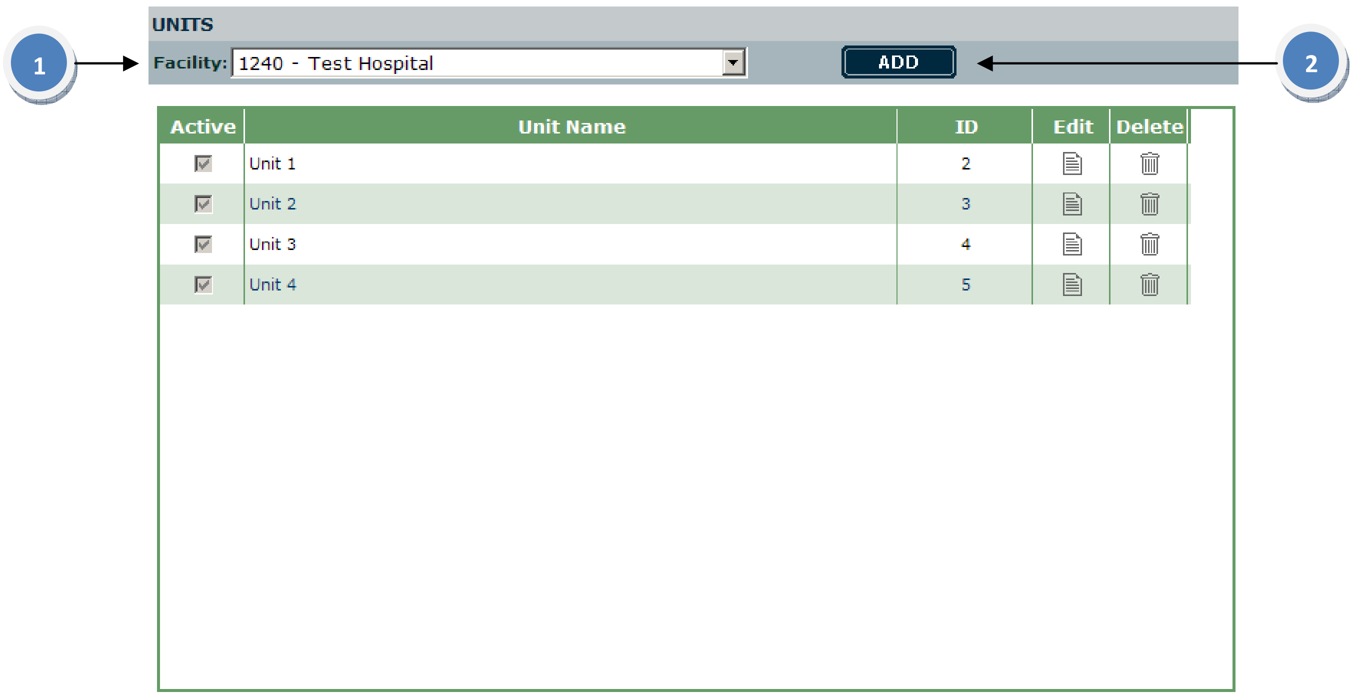


To add a new survey assignment, complete the following steps:

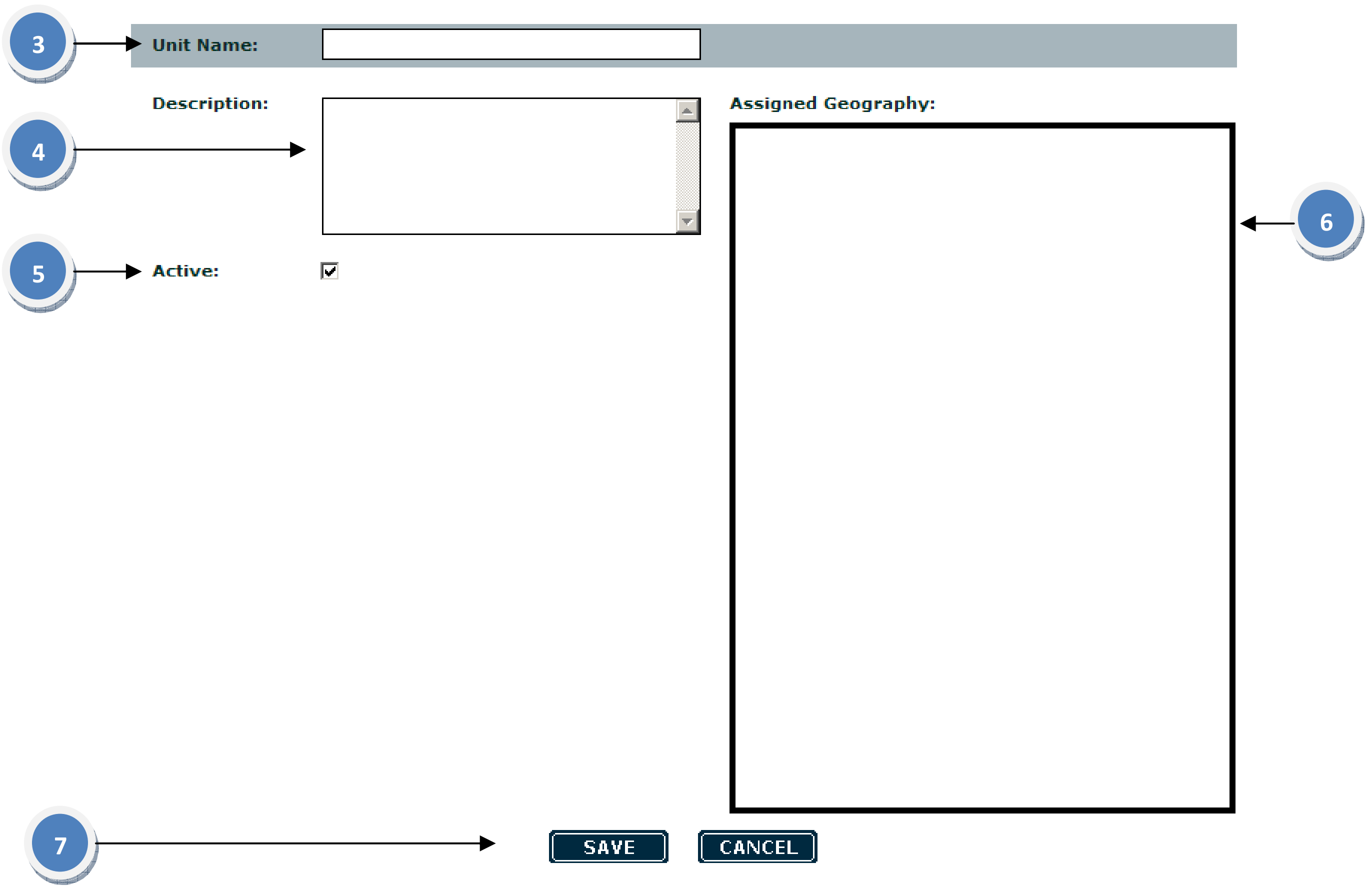
Site – Select your site from the drop list if it isn't already populated.
Functional Area – Select your functional area from the drop list if it isn't already selected.
Geography Navigation – Use the Expand All control to expand and view the entire geography or use the + button to navigate to a specific location to which you want to assign a survey.
Room Selection – Once you expand the geography so that you can view the appropriate room, click the checkbox next to the room or rooms to which you want to assign the survey.
Survey Type – Select the survey type (Inspections, Observations, or Surveys) radio button that you wish to assign.
Survey Selection – Highlight the survey title that you wish to assign by clicking on it.
Assign – Click the Assign button to assign the selected survey to the selected room(s). When the survey is successfully assigned, the survey title will appear under the room in the geography window.

Units

The Units section of Team Coach gives the administrator the ability to define the specific units for any given facility. Units are used for reporting purposes and are not required to use the application.



1. **Facility** - Select your facility name from the list of values. This step will only be necessary if you have access to more than one facility.
2. Click the **Add** button to create a new unit.



3. **Unit Name** – Enter the name of the unit.
4. **Description (Optional)** - Enter a description of the unit.
5. **Active Location** – When creating a new room this checkbox will be selected. To deactivate a room you can uncheck the Active box, by doing so the room will no longer be active.
6. **Assigned Geography** -
7. Click on the **Save** button once your have completed the entry to save your work.

Important Note: Units are simply a way to group rooms for reporting purposes. If you don't need to run reports by unit, there is no need to add units to the system.

People

The People section of the system allows you to manage the people, skills, and access levels of all facility users in Team Coach. Employees and Supervisors added to the People section will appear in the Employee and Supervisor list of values in the survey entry screen. The mobile application will also filter the viewable forms by supervisor so that each supervisor will only see his or her inspections when logged in to the mobile application

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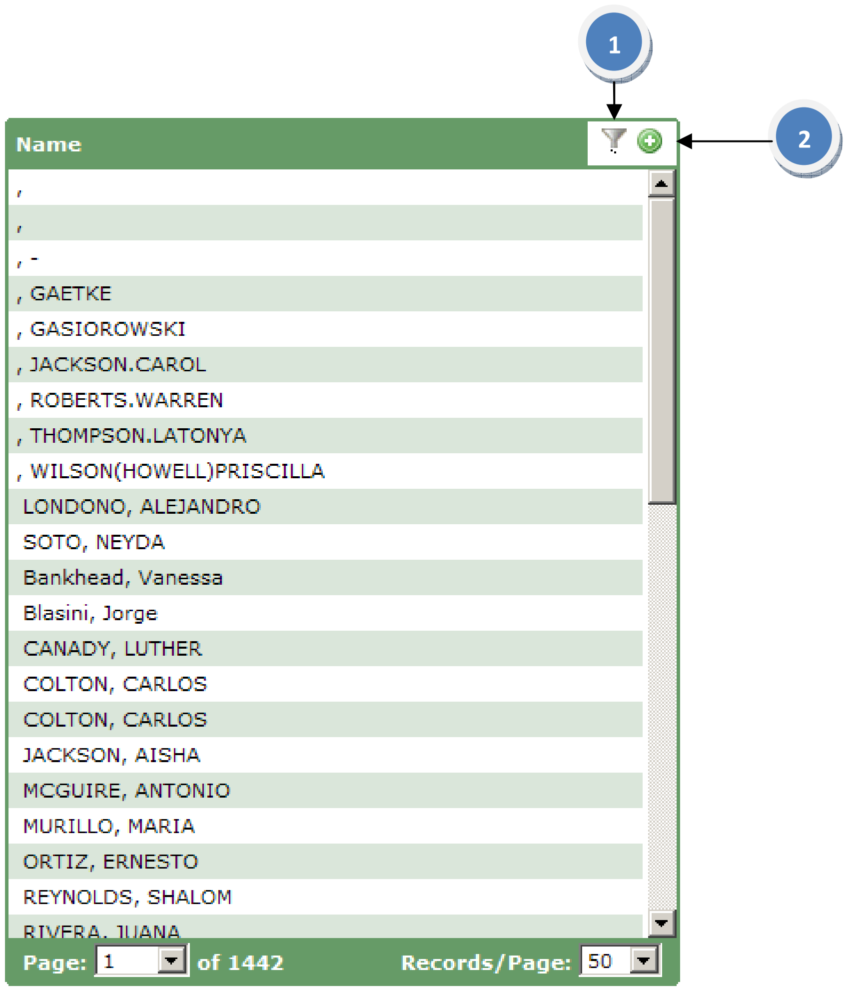
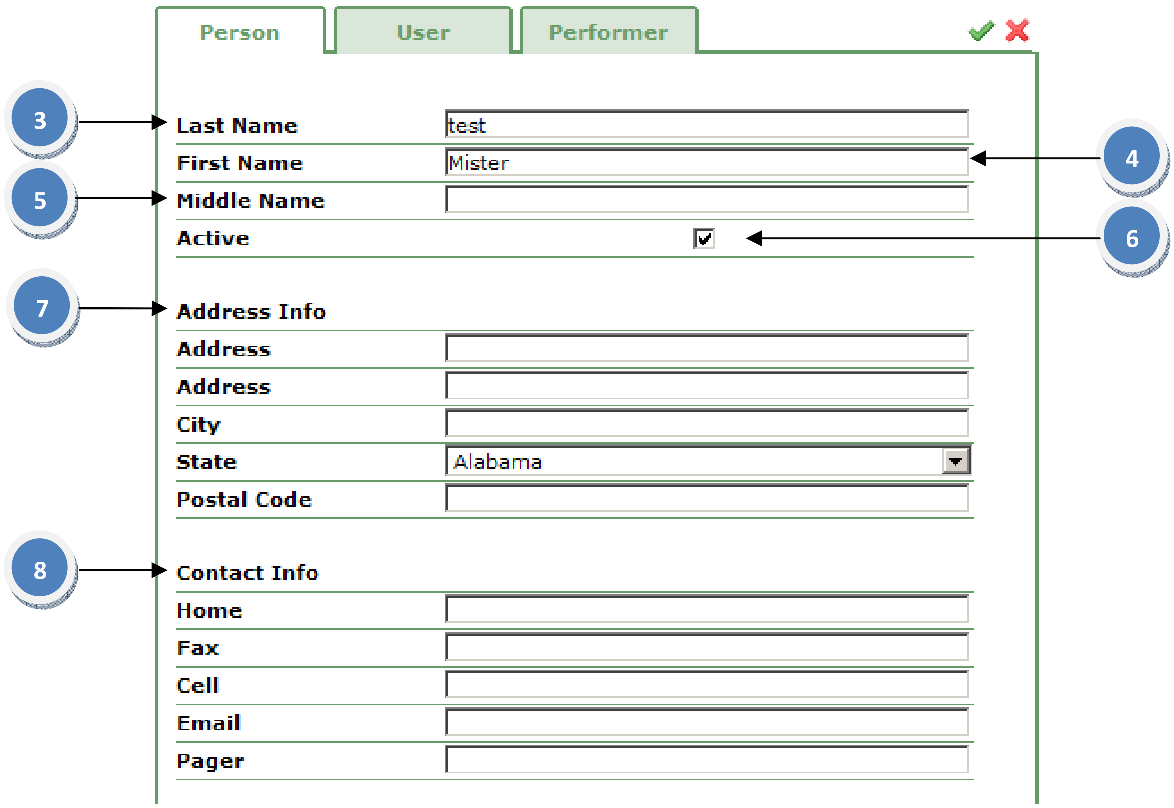


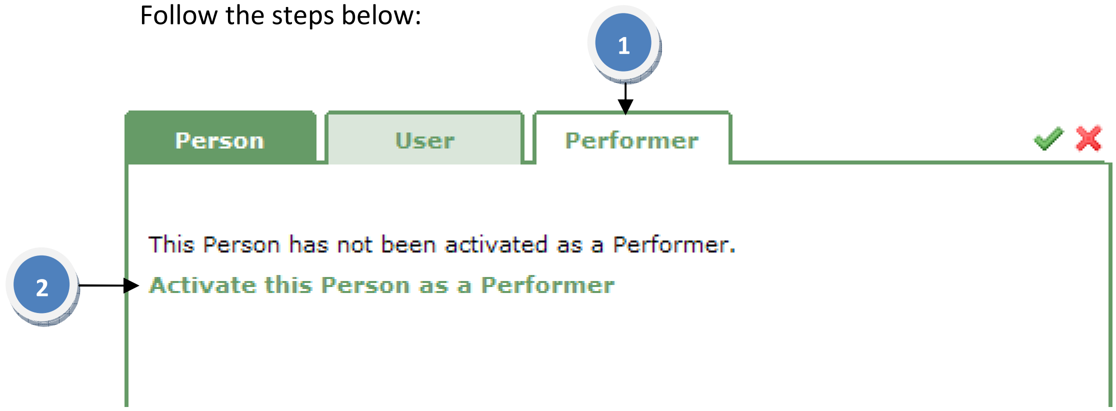
1. **Filter** – The filter screen allows you to search for people based on certain criteria. Click on the filter icon, enter filter criteria and click the Save button to filter the list of People.
2. **Add** – To add a new Person, click the Add icon at the top of the People list, then complete the following steps:



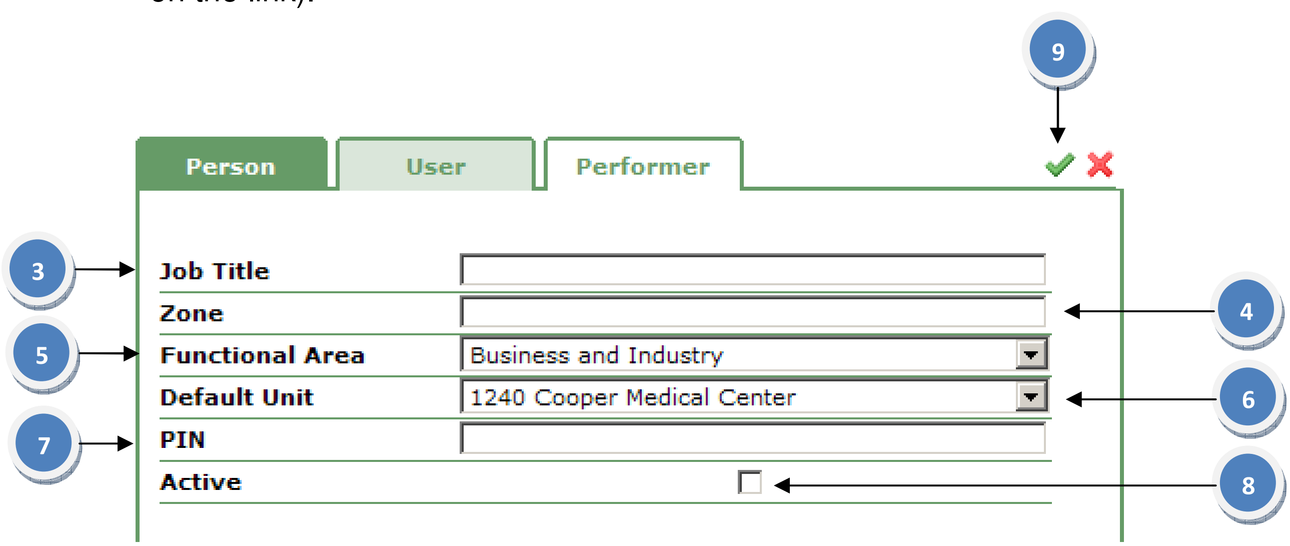
3. **Last Name** – Enter the last name of the person
4. **First Name** – Enter the first name of the person
5. **Middle Name (Optional)** – Enter the middle name of the person
6. **Active** – A person must be active if they are a User or Performer. Inactive people cannot log in to the application and do not appear in the supervisor or employee list of values in the survey entry screen.
7. **Address info (Optional)** – Address information is not required for TeamCoach, but can be used for a contact list.
8. **Contact Info (Optional)**

Activate as a Performer and Add Skills

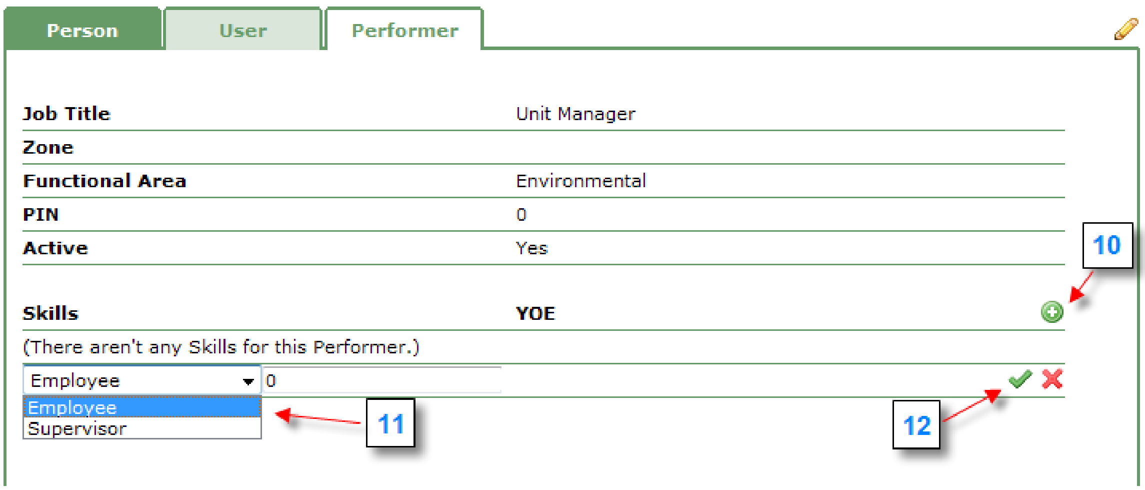
In order for a person to appear in the Employee or Supervisor dropdown in the survey entry page, they must be activated as a performer and have skills associated to them. Follow the steps below:



1. Performer
2. Click the **Activate this Person as a Performer** link to enter the Performer details (you may need to first click the pencil icon (edit) to be able to click on the link).



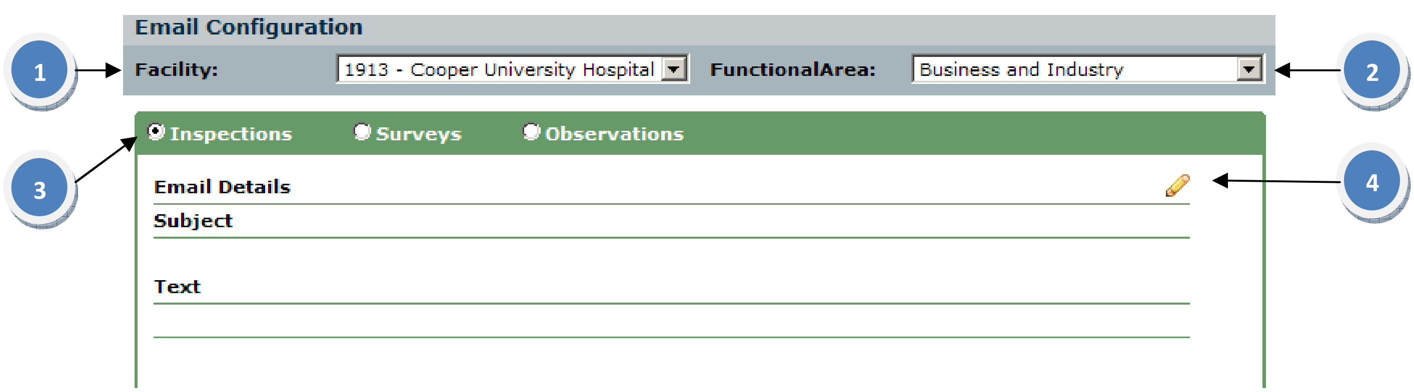
3. **Job Title** – Enter a job title of the performer
4. **Zone** – Enter the name of the zone in which the performer works.
5. **Functional Area** – Select your functional area from the drop list if it isn't already selected.
6. **Default Unit** – Select the default unit from the drop-down list if it isn't already selected.
7. PIN – Enter a PIN number for the performer.
8. **Active Performer** - When creating a new Performer, this checkbox will be selected. To deactivate a Performer, you can uncheck the Active box, by doing so the Performer will no longer be active.
9. Click on the **Update** button once your have completed the entry to save your work.



10. Click the add icon to add skills to a performer. This determines whether the person appears in the Supervisor and/or Employee dropdowns in the survey entry page.
11. Select Employee or Supervisor from the list.
12. Click the green check to save the skill.
13. Repeat the process to add a second skill (you can do this if you want the person to appear in both the Employee and Supervisor dropdowns in the survey entry screen).

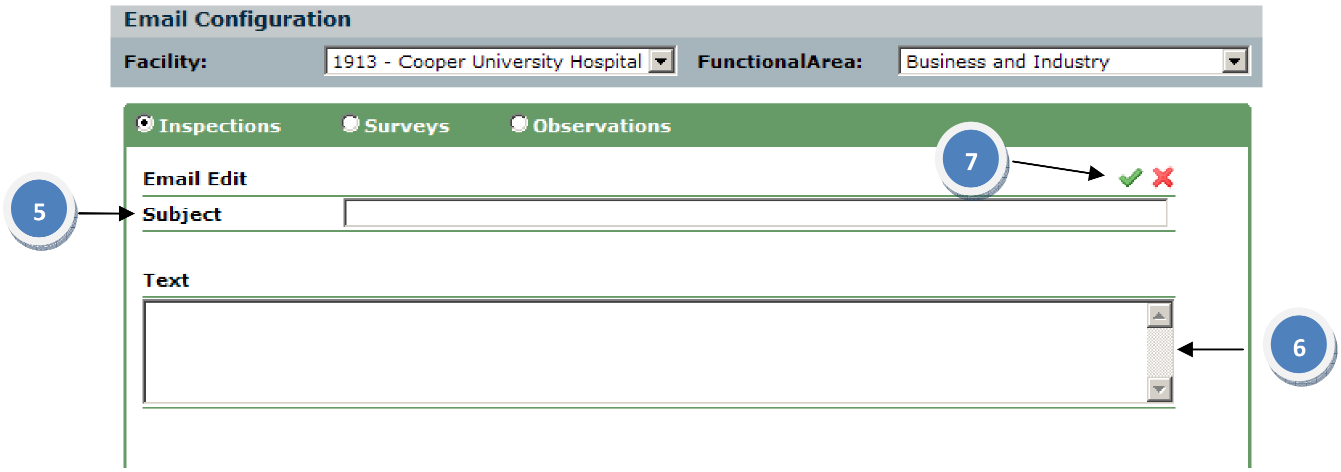
Email

The Email section of the system allows you to create and define the subject line and body of the emails sent from TeamCoach. This allows you to customize the emails for your site. Follow the steps below to update the email subject and text for each form type.



1. **Facility** - Select your facility name from the list of values. This step will only be necessary if you have access to more than one facility.

2. **Functional Area** – Select your functional area from the drop list if it isn't already selected.
3. **Survey Type** – Select the survey type (Inspections, Observations, or Surveys) that you wish to assign.
4. Click the **Edit** icon to enter the email details.



5. **Subject** – Enter the standard subject line for the email.
6. **Text** – Enter the text that will be displayed in the body of the email.
7. Click on the **Update** button once your have completed the entry to save your work.

Important Note: Be sure to select the correct functional area when updating the email configuration page to prevent changing someone else's configuration by mistake.

Section 3: Generate Forms

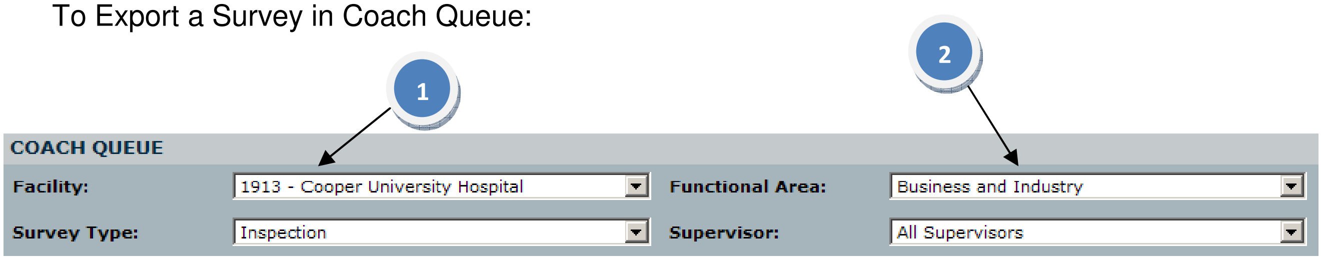
Functional Areas and Surveys

TeamCoach is designed to be used to complete surveys and QAs for several different departments including Environmental Services (HSK), Facility (POM), Clinical Engineering (CES), Linen Services (Laundry), Eurest Services, and Transportation (Patient Transport). Each functional area has different templates for surveys and QAs.

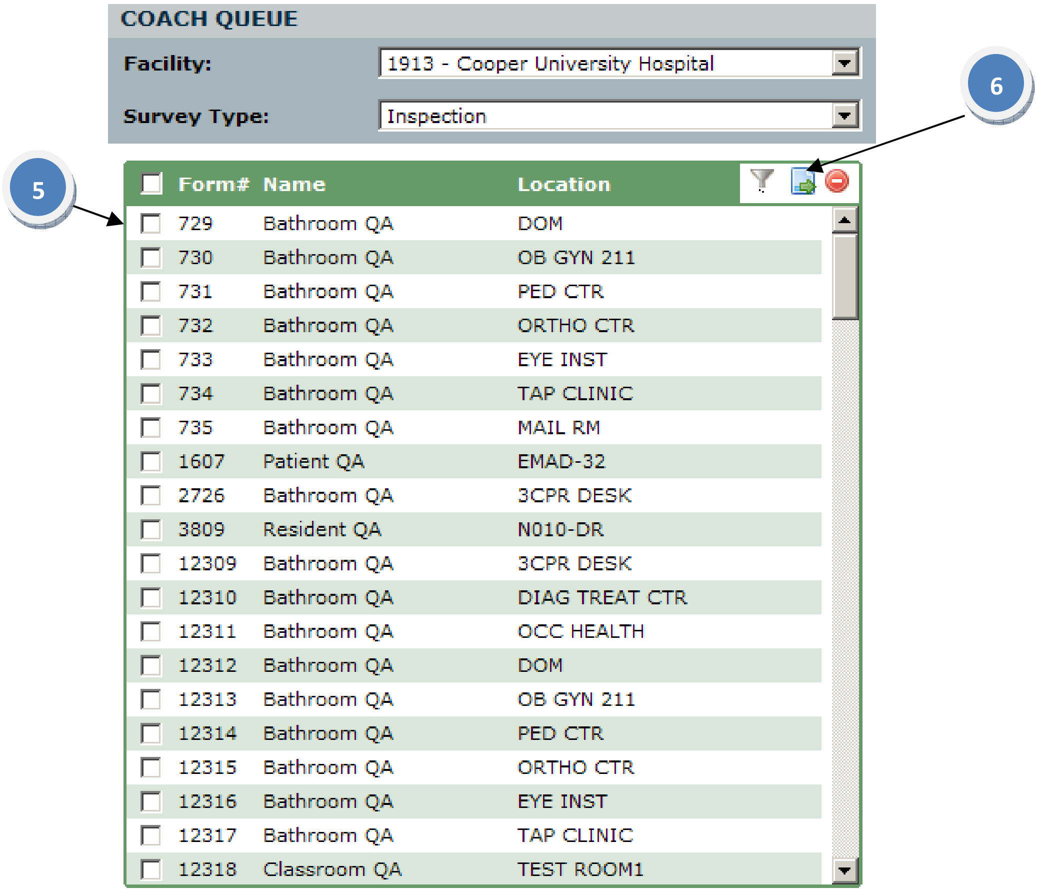
Coach Queue

The Coach Queue contains a listing of all generated surveys that have not been completed for a given facility. You can regenerat surveys or link to the entry screen to complete forms using the Coach Queue. The dropdowns at the top of the screen allow you to filter the list by Facility, Functional Area, Survey Type and Supervisor.

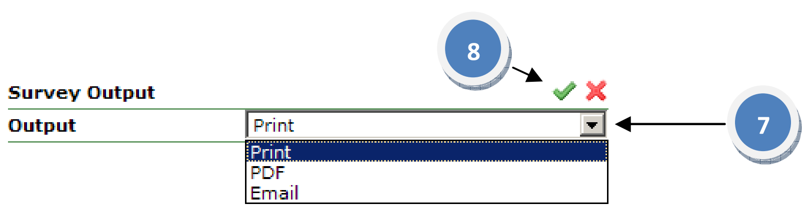
To Export a Survey in Coach Queue:



1. **Facility** – Select your facility name from the list of values. This step will only be necessary if you have access to more than one facility.
2. **Functional Area** – Select your functional area from the drop list if it isn't already selected.
3. **Survey Type** – Select the survey type (Inspections, Observations, or Surveys) that you wish to assign.
4. **Supervisor** – Select the appropriate Supervisor from the drop-down list.

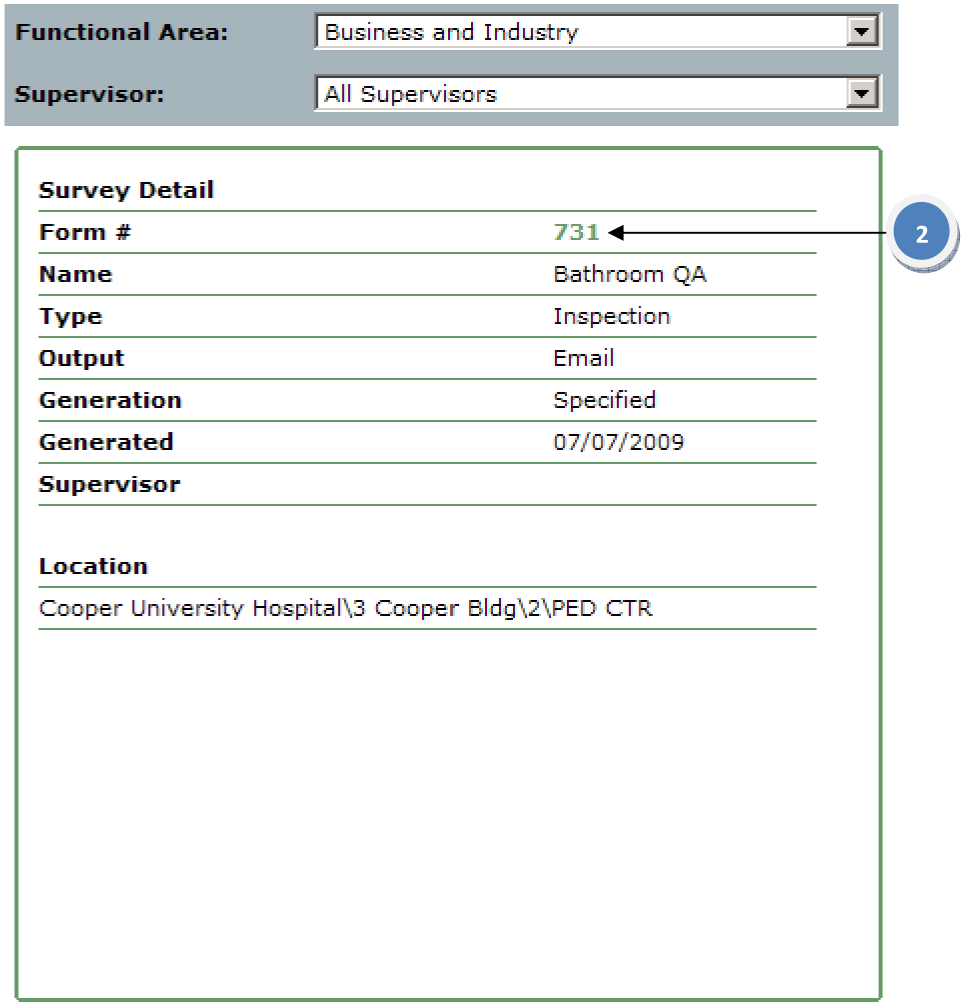


5. Select a survey in the Coach Queue (Checkbox)
6. Click the **Output Survey** icon.

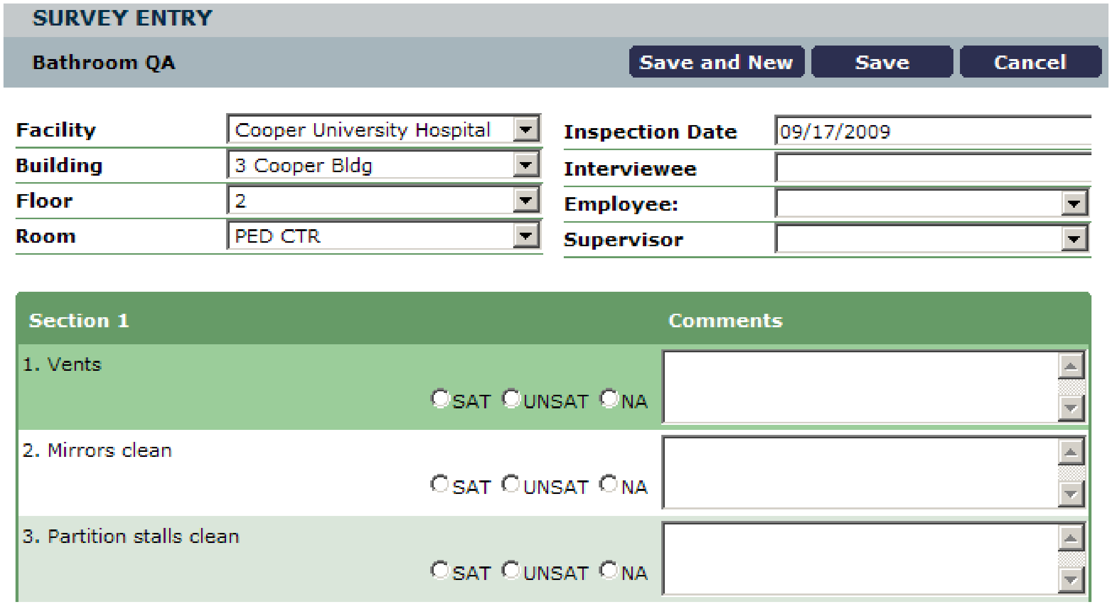


7. Select a survey output type from the drop-down list.
8. Click on the **Update** button once your have completed the entry to save your work.

To complete a Survey listed in the in Coach Queue:



1. Select a survey in the Coach Queue (checkbox)
2. In the Survey Detail section, click the **Form #** link to access the survey.

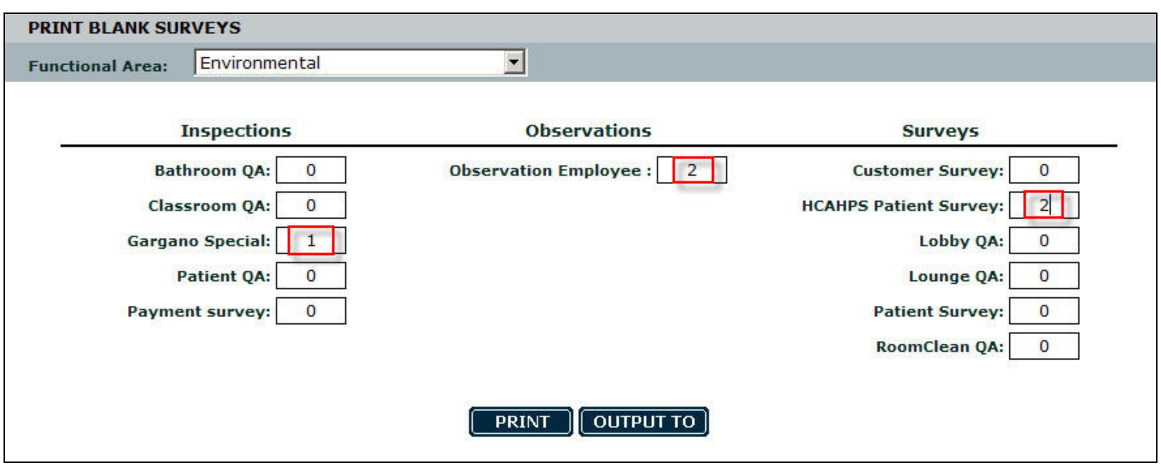


Important Note: Once a survey is completed, it will no longer appear in the Coach Queue.

Blank Forms

Blank forms are just that – QA or survey forms that have location data. You can print as many of these as you need and hand them out to the inspectors. The inspectors will be responsible for filling in all appropriate information, including the room information.

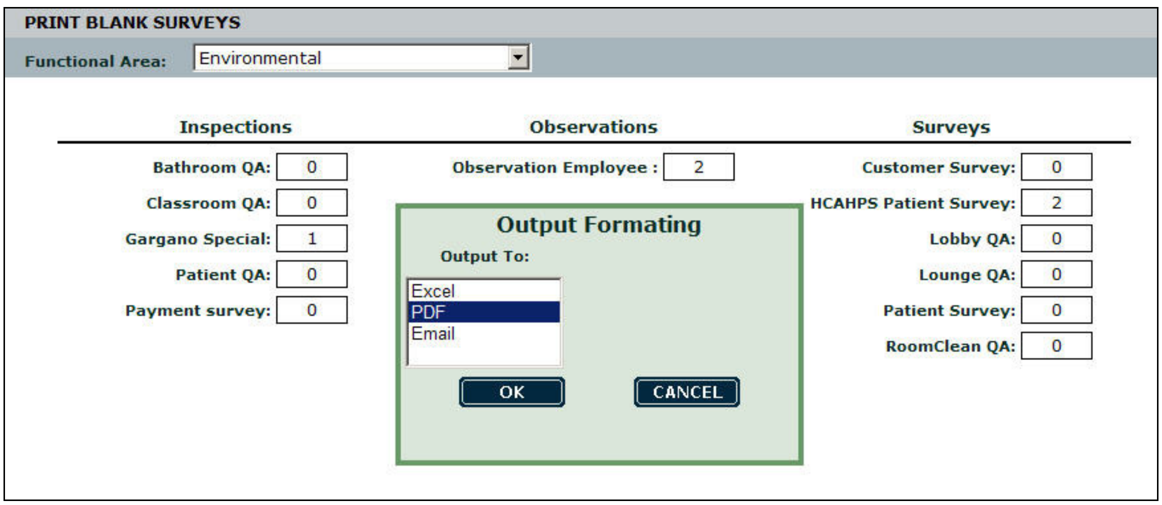
To print blank forms, click on **Blank Forms** link under the **Generate Forms** menu.



On the screen that appears, select the desired number of each type of form you wish to print by typing the number into the field. Once you have made your selections, you can click the **Print** button at the bottom of the screen. The next screen will show a list of the selections you made along with the printer dialogue box. You will then be able to print out your selections.

TeamCoach also gives you the option to output the forms to other formats such as: Excel, PDF, and Email. When you select the **Output To** button and select either Excel or PDF, the system shows the form in that format. When selecting Email, the system will ask you for the email attachment format you would prefer (Excel or PDF) and require you to enter an email address.

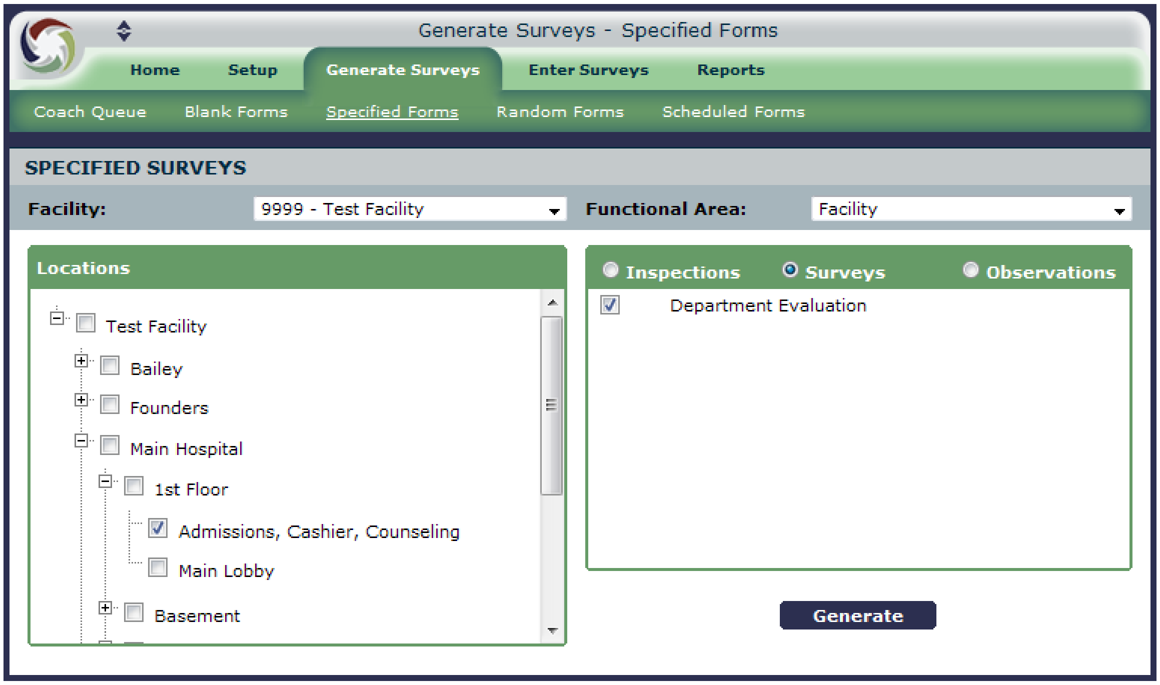
Once the form is sent to you via email, the PDF attachment can be printed and will generate a form ID. There will be a link in the email to allow you to enter the data into TeamCoach directly through the URL provided. Another option would be to log back into the application and enter the form in the **Enter Form** section.



Note: Because blank forms are just that, you can print a master set of inspection forms and simply make photocopies when you need more. We suggest this approach as it is typically more economical to make photocopies than it is to print using a laser or ink jet printer. This approach will not work for random or specified forms

Specified Forms

Specified forms can be useful if you want to have inspectors focus on problem areas, or if your client wants to inspect a particular room or space. To print specified forms, click on the **Specified Forms** link under the **Generate Forms** menu.



From the selection screen that appears, select the facility, functional area for which you want to generate forms. Then, check off the Locations and Forms that you want to generate. If you click multiple locations, but one form, a form that you selected will be generated for each selected location.

When finished, select the **Generate** button. The output options in this section are printer, PDF, or email. If you select email you will need to input an email address.

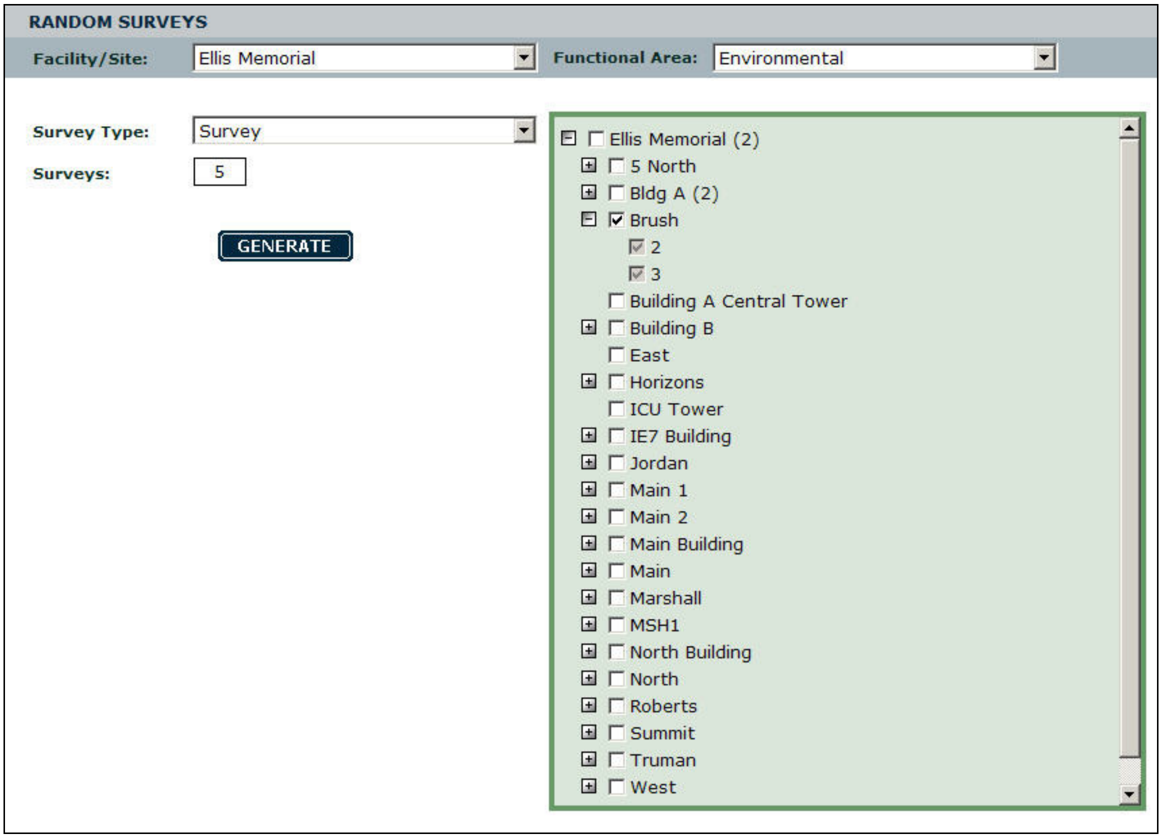
Random Forms

The advantage to using random forms is that they do not allow the inspectors to visit “favorite” areas. To print random forms, click on the **Random Forms** link under the **Generate Forms** menu.

Select the facility, functional area, and survey type from the drop down menus. Enter the desired number of forms in each category you want in the **surveys** box. The box on the right will show the geography of the hospital down to the floor level. By selecting the facility, building, and floors, the system then randomly generates surveys for those areas.

When selecting the facility level, the system will automatically check off all buildings and floors for you. When selecting the building level the floors in that building will get checked off.

When finished entering all of the appropriate information, select the **Generate** button. The output options in this section are printer, PDF, or email. If you select email you will need to input an email address.

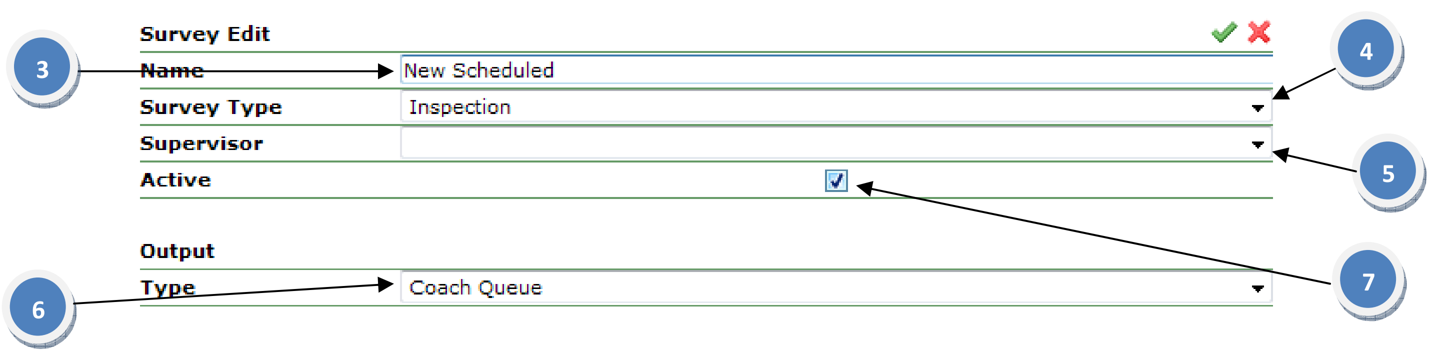


Scheduled Forms

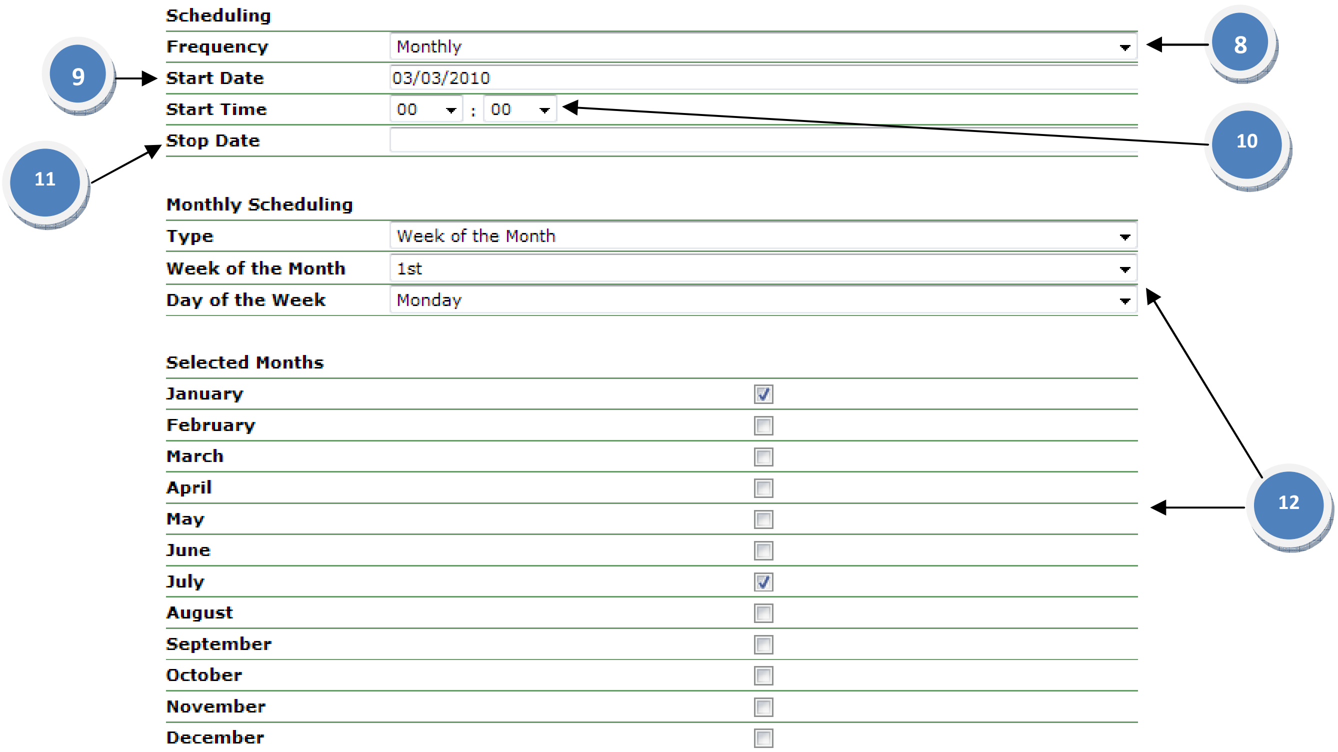
Scheduled Forms allow you to configure the system to automatically generate forms on a periodic basis. For example, you could create a schedule that emails the a customer survey to a department head each month.

To create a scheduled survey in Team Coach:

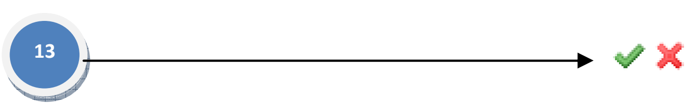
1. **Facility** - Select your facility name from the list of values. This step will only be necessary if you have access to more than one facility.
2. Click the **Add** button to create a new unit.



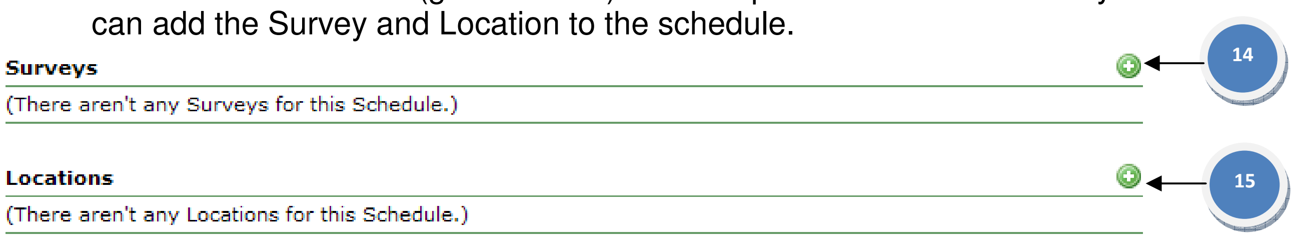
3. **Schedule Name** – Enter a name for the scheduled survey
4. **Survey Type** – Select the survey type (Inspections, Observations, or Surveys) that you wish to assign.
5. **Supervisor** – Select the supervisor.
6. **Output Type** – Select the delivery method type for the scheduled survey
7. **Active** – Determines whether the scheduled survey will be generated. If you no longer want the schedule to generate a survey, uncheck the Active box and Save the changes.



8. **Frequency** – Select how often you would like the survey to generate
9. **Start Date** – Select the first date that you would like the survey to generate.
10. **Start Time** – Select the time of day that you would like the survey to be generated (Note: this time is based on the Eastern Time Zone).
11. **Stop Date** – This is optional. You can enter the last date that you want the survey to generate. Leave this field blank if you want the schedule to continue indefinitely.
12. **Scheduling Details** – Depending on the Frequency selected, you will be able to add details of the schedule. In this case, we've created a schedule that will generate a form on the 1st Monday of January and July. If we wanted it to generate every month, we would simply check the box next to every month.



13. Click the **Save** button (green check) at the top of the screen so that you can add the Survey and Location to the schedule.



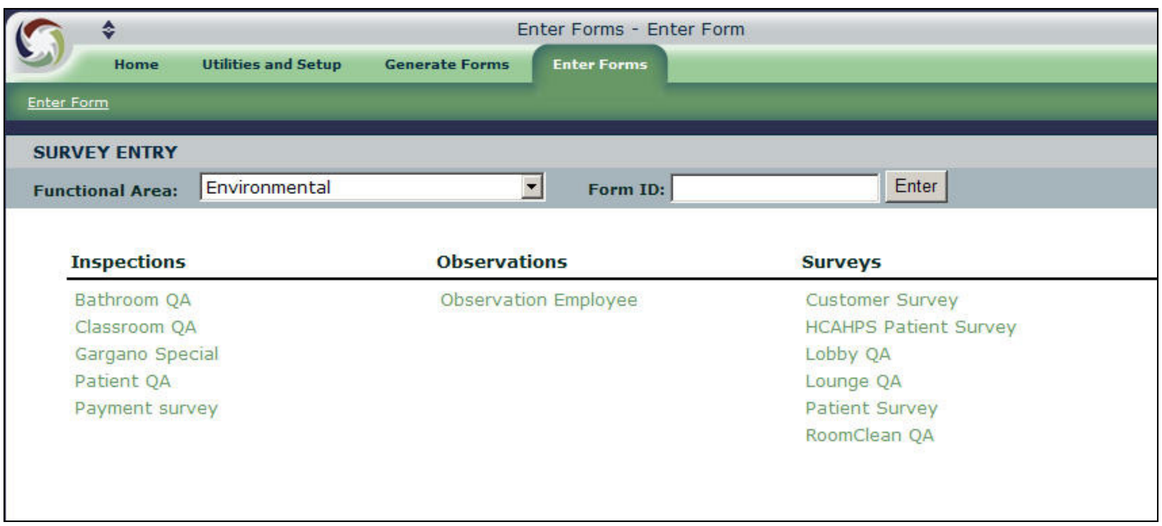
14. Click the **Add** button in the Surveys area to add surveys to the schedule.

15. Click the **Add** button in the Locations area to add the location (or department) that the survey is for

Section 4: Enter Forms

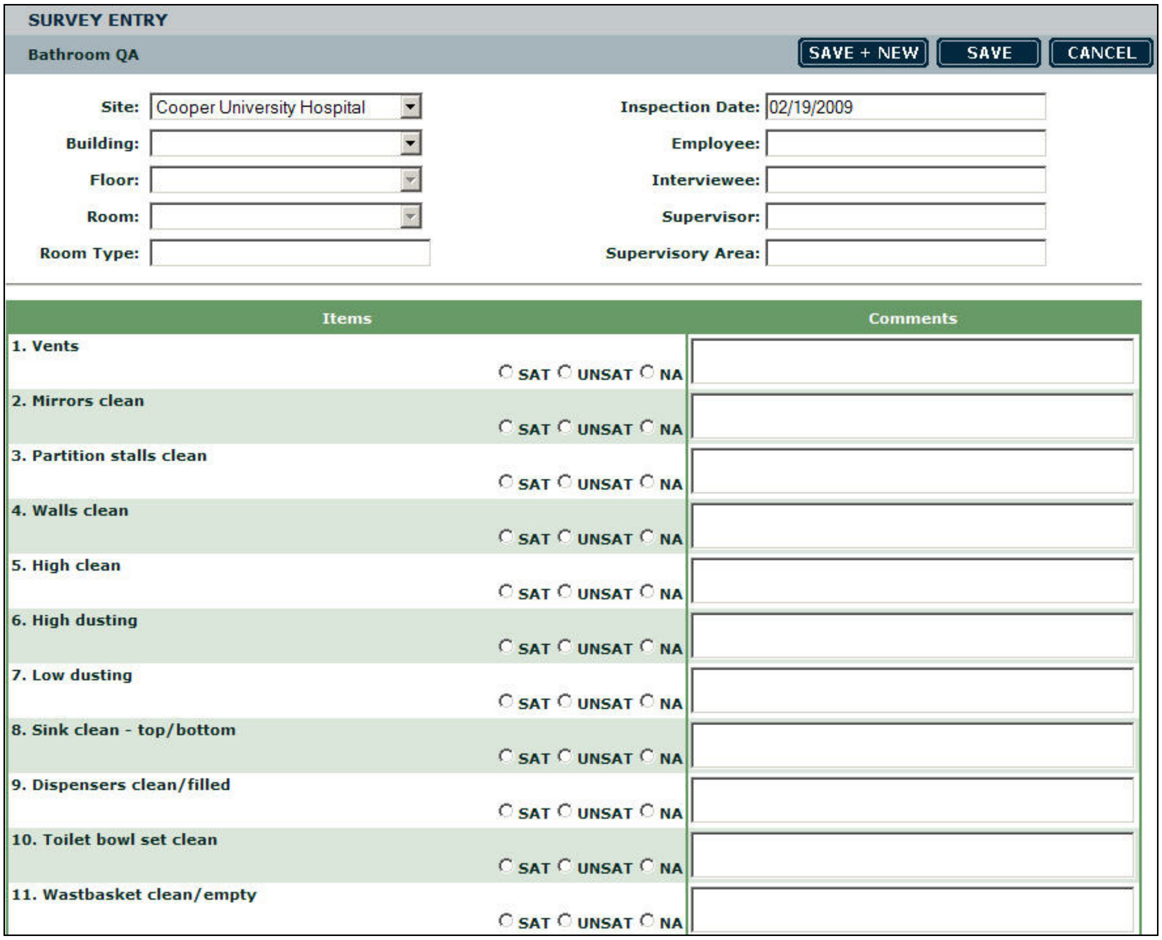
Enter Form

Once QAs and surveys have been completed, the results must be entered back into the system. To begin entering forms, first select the **Enter Forms** menu option and then **Enter Form** from the submenu.



When surveys and inspections are printed they have a form ID. When you are ready to input the form into the system you need to enter that form ID into the **Form ID** field next to the functional area drop down.

From the selection screen that appears select the type of form that you wish to enter data for. The data entry screen will appear.



Fill in the known information in the header then fill in the QA or survey results in the bottom part of the screen. You will need to scroll down on some of the surveys to fill in all of the information. When you have entered all the information, click on the **Save** button. If you have another form to enter you can select the **Save + New** button and the fields on the screen will clear and you can enter your next QA or survey. To return to the Enter Forms selection screen, click the **Cancel** button at the bottom of the screen.

Entering Forms – Hints and Tips

You will find it easier to enter QAs and surveys if you organize them by form type. For example, stack all of the patient QAs together, then the bathroom QAs, then the patient surveys. This will eliminate the need to switch between different form types.

If there are no Supervisors or Employees in the dropdown lists on the enter forms page, you must add them in the People area in TeamCoach. Please refer to the People section under Setup for further instructions.

There are some keyboard shortcuts that will speed up the entering process. Use the numeric keypad to quickly enter survey responses. The shortcut numbering will be based on the total number of possible responses. The highest number will be the keyboard shortcut for the best possible response.

For example:

- Satisfactory 2
- Unsatisfactory 1
- N/A 0

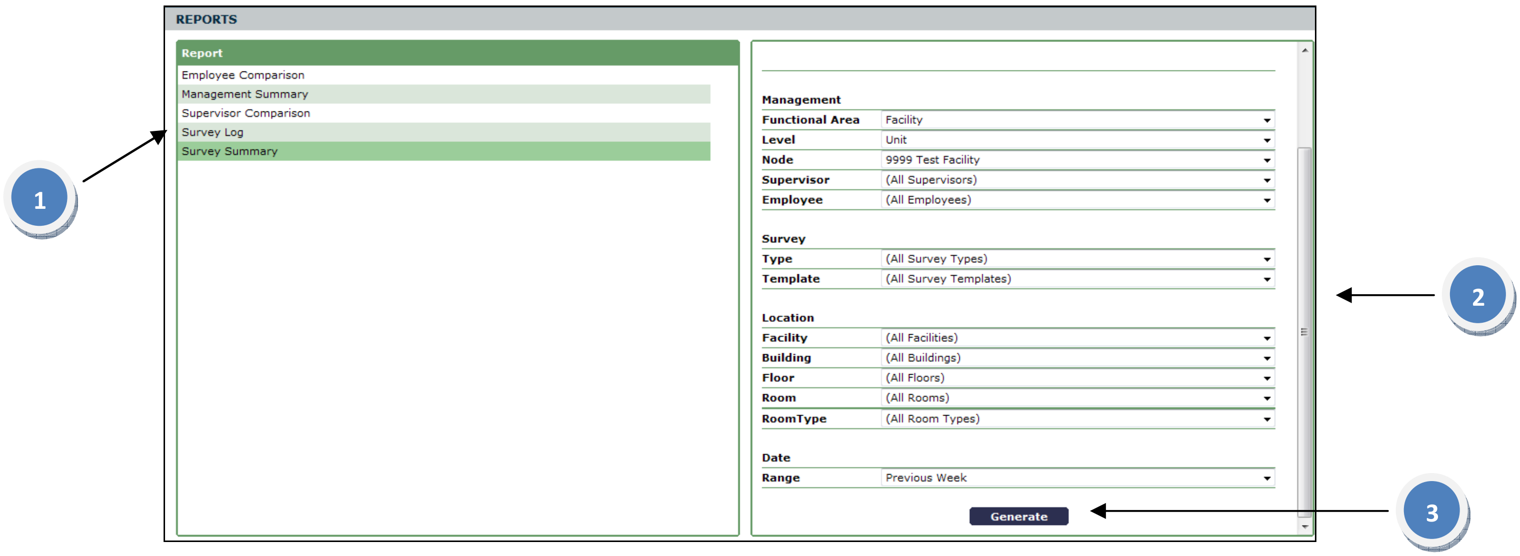
Or

- Excellent 5
- Good 4
- Fair 3
- Poor 2
- Bad 1
- N/A 0

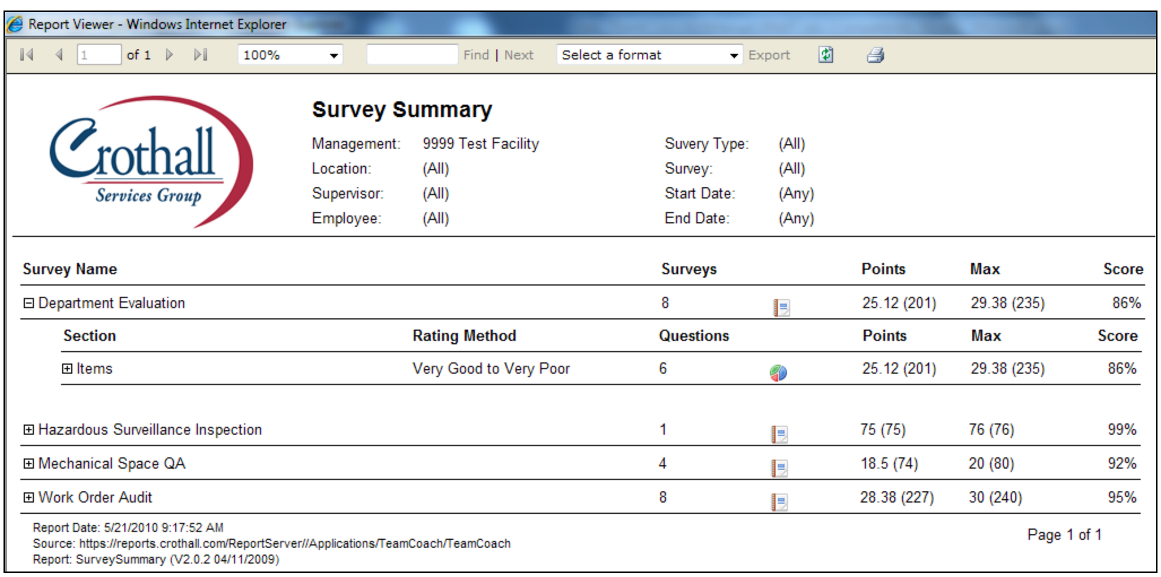
When N/A (not applicable) is chosen on a survey or QA, that question will be removed from the total for the form. For example, if a survey has 10 questions, and the respondent chose N/A for one of the questions, the survey will be scored out of a total of 9 questions instead of 10.

Section 5: Reporting

The Report page is split into two areas. The reports list is on the left side of the screen while the filter options are on the right. Depending on the report that you select on the left side, the available filters on the right may change. Simply select the report that you want to generate on the left side, narrow down the data that is returned using the filters on the right and click generate.



1. Select the report that you want to run.
2. Choose the desired filter options.
3. Click Generate button.
4. The report will open in a new window will open and you will have to enter your username and password the first time you run a report.



Many of the reports are interactive allowing you to drill down to additional information or click icons (like the log book or pie chart) to open other reports. If you click on one of the drilldowns or icons, you can return to the previous page by clicking the Backspace key on your keyboard.

You can export reports to other formats to save them or create other charts in Excel by clicking the “Select a format” dropdown at the top of the reports page. Once you have chosen your format, click the Export link to create the report in another format. Click the printer icon to print the report as it appears on screen.

Section 6: TeamCoach 2.0 Mobile

Introduction

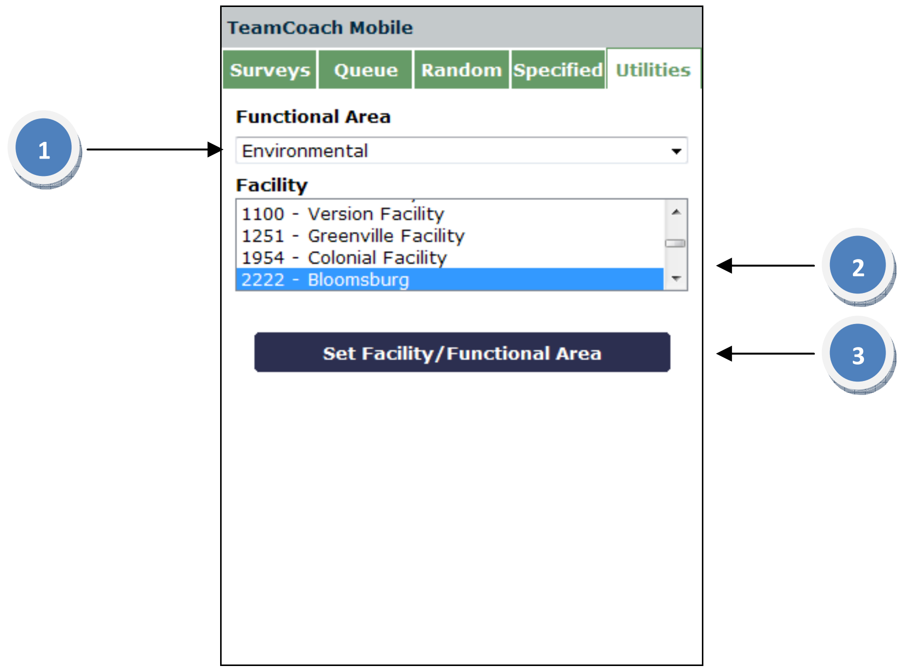
TeamCoach Mobile is a web-based version of TeamCoach formatted to fit on a mobile device so that forms can be generated and completed on-the-fly at facilities with an accessible wireless network. The forms can be downloaded when a wireless connection is available, and completed while the device is on or offline to allow for continued use in areas without wireless coverage. No local application installation is required; simply go to https://coach.crothall.com./mobile on an approved mobile device's browser and login with your TeamCoach username and password to use TeamCoach Mobile. Improve efficiencies by eliminating the need for paper forms and re-entry of survey responses.

Accessing TeamCoach 2.0 Mobile

TeamCoach Mobile 2.0 can be accessed by typing https://coach.crothall.com/mobile into your mobile device's browser. Once you login with your TeamCoach username and password, add the site to your bookmarks or favorites so that you don't have to type the address each time. You must be set up as a Supervisor in TeamCoach in order to output forms to the mobile application. Refer to the People section of this manual for instructions to add a person and performer skills. Once logged in, you will see the Utilities Tab

Utilities

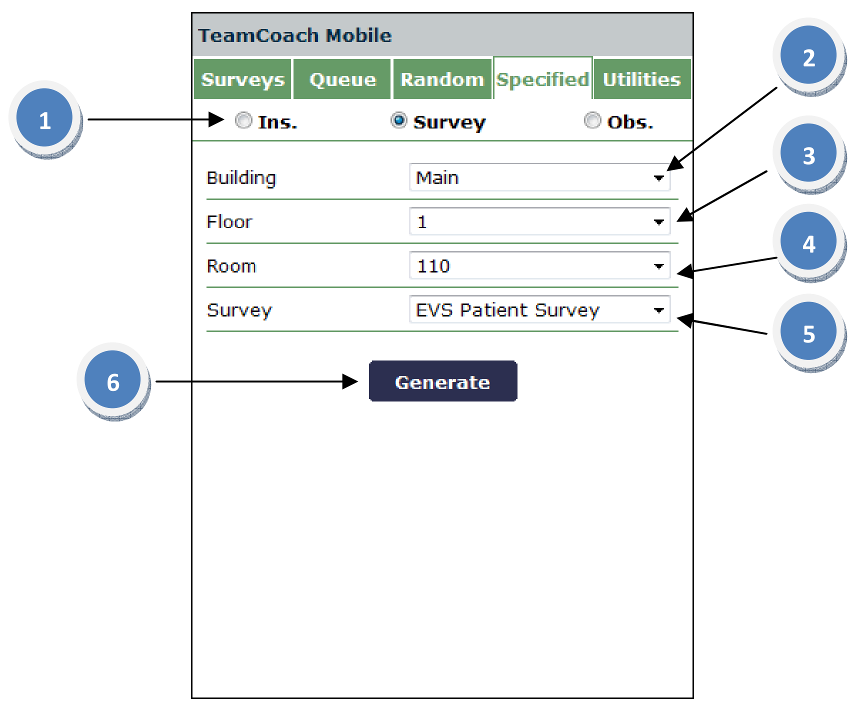
The Utilities tab allows you to set your Facility and Functional Area that you will use during your session in the mobile application. Follow the steps below to set your facility and functional area. Your device must be connected to the wireless network in order to set your Facility and Functional Area.



1. Select your functional area from the dropdown list.
2. Select your facility from the dropdown list.
3. Click the Set Facility/Functional Area button.
4. Click OK to continue.

Specified

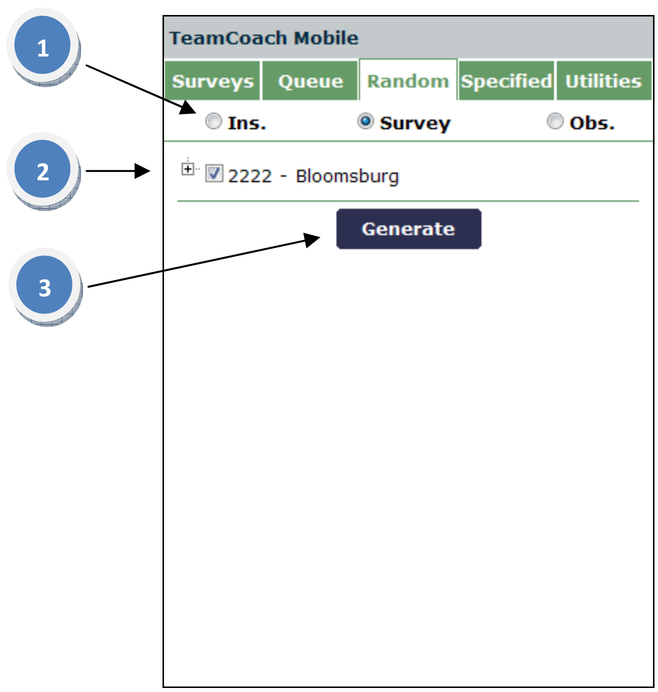
The Specified tab allows you to generate Specified forms from the mobile application. Follow the steps below to generate a specified form.



1. Select the radio button next to the form type that you want to generate (Inspection, Survey or Observation).
2. Select the Building for the specified form.
3. Select the Floor for the specified form.
4. Select the Room for the specified form.
5. Select the Survey that you want to generate.
6. Click Generate.
7. Click Ok to enter the form immediately. See the Entering Forms section for further details.

Random

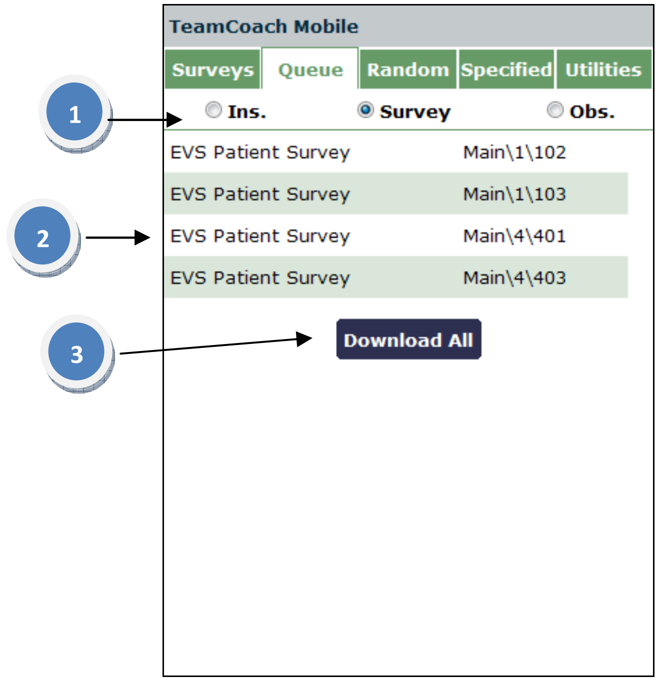
The Random tab allows you to generate Random forms from the mobile application. Follow the steps below to generate a random form.



1. Select the form type that you want to generate.
2. Select the geography that you want as a possible location for the random form.
3. Click Generate.

Queue

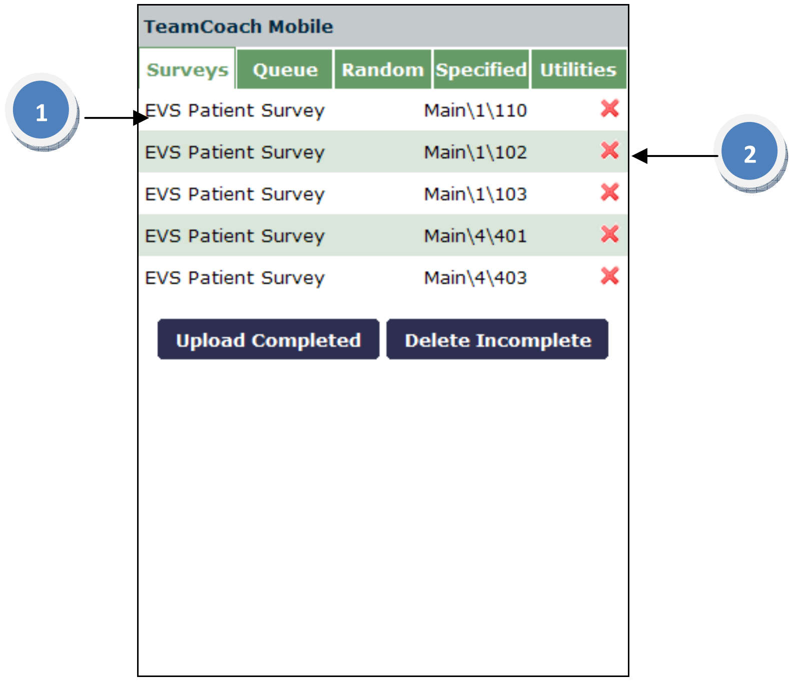
The Queue tab contains a list of forms that have been output to the mobile device for the supervisor who has logged in. From the Queue, you can download individual forms or download all forms by clicking the “Download All” button. Once you download a form you have the option to enter the form immediately or download additional forms. Downloaded forms will be removed from the queue and can be found and entered on the Surveys tab. Your device must be connected to a wireless network in order to download forms. Follow the directions below to download forms to your device.



1. Click on the form type radio buttons to view the list of forms that were output to your mobile device.
2. Click on individual forms to download them to the device so they can be entered, OR
3. Click Download All to download all forms of the select type.

Surveys

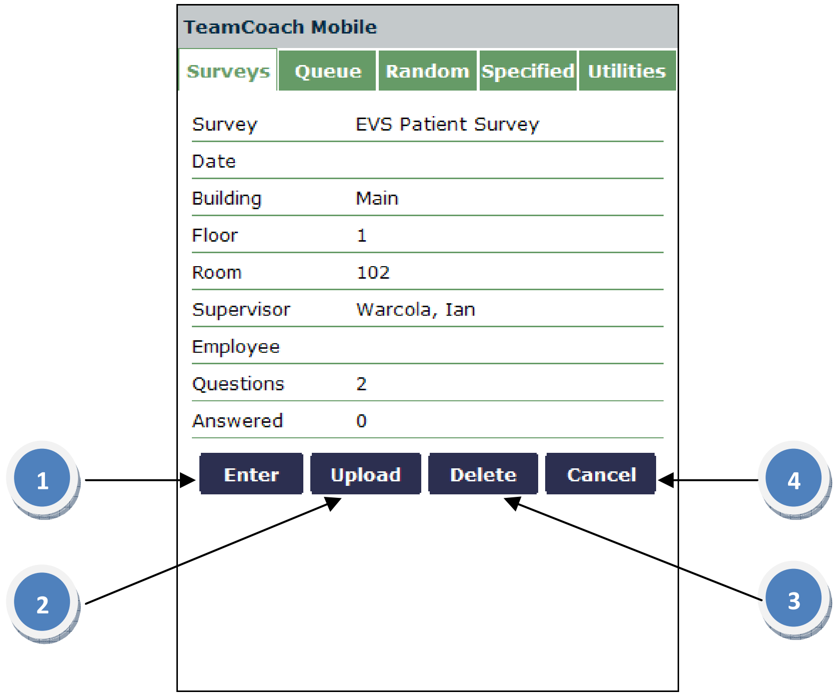
The Surveys tab contains a list of all forms that have been downloaded or generated on the mobile device. Follow the steps below to enter and upload forms. You do not need a wireless connection to enter forms, but you must be connected when uploading the forms.



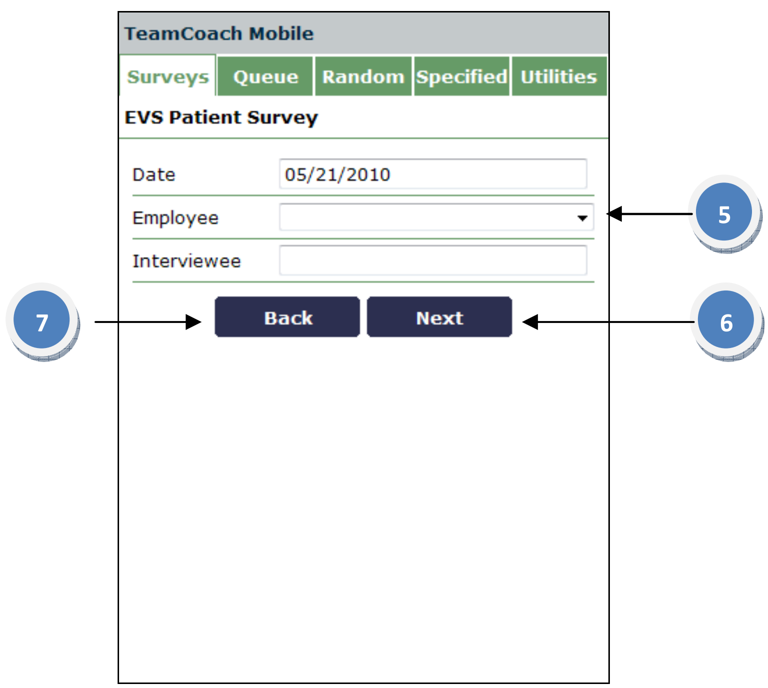
1. To enter a form, click on the row of the form that you want to enter.
2. You can click on the red x to remove a survey from the survey tab. This will return the form to the Queue if it was downloaded. Forms can only be removed from the Queue using the Coach Queue in the full version of TeamCoach.

Entering Forms in Coach Mobile

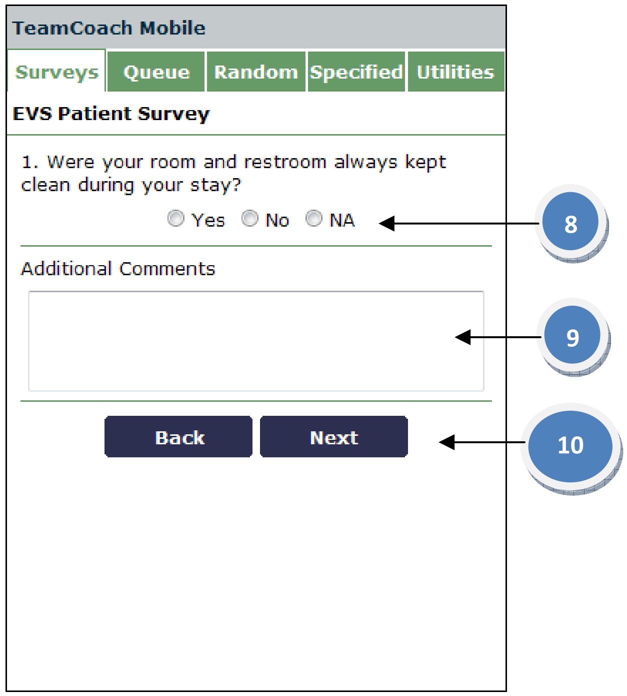
Once you click on a form to enter it, you will see a screen similar to the one below.



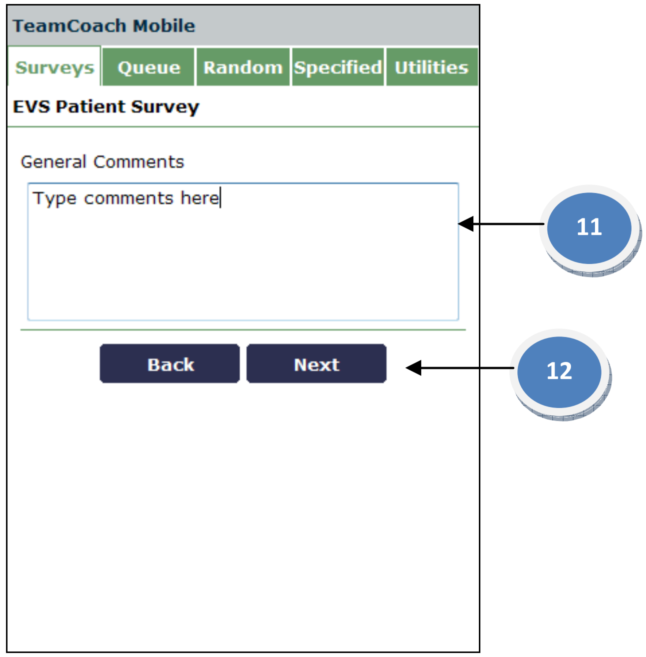
1. Click on the Enter button to continue to enter the form.
2. If the form had been completed earlier, you can click on the Upload button to upload the form (you must have a wireless connection).
3. Clicking Delete will remove the form from the Survey tab. If it was downloaded from the Queue, it will be returned to the Queue.
4. Click the Cancel button to return to the Survey list.



5. Enter the Date, Employee and Interviewee. The supervisor will default to the person who is logged into the mobile application. Depending on the form, some of these fields may be required.
6. Click Next to go to the first question or item on the form.
7. The Back button will take you back to the previous screen.



8. Tap the radio button next to the desired response.
9. Tap on the text box under additional comments to bring up the keyboard on the mobile device. Enter comments using the keyboard; depending on the form it may be required.
10. Click Next to go to the next question or item.



11. After the last question or item, you can enter General Comments by tapping the text box and using the devices keyboard.
12. Click Next to continue.

Uploading Forms

Once you have completed one or more form on the mobile device, they will have a green check mark next to them in the Survey list. You can upload the completed forms by tapping the "Upload Completed" button. You must be connected to the wireless network to perform this function.