Mobile Application Training Template
[patient-engaged, CR staff-administered]
This template can be used to create training materials to conduct task-based mobile app training.

[insert pictures and logos that are culturally tailored for your population, links to training videos]

Invite patient to use Application
As part of the Cardiac Rehab program, we are offering a mobile application. This is a mobile application that you can download onto your smartphone that can help you keep track of your exercise, vital signs, and medications. It also has education materials you can view and a way to send messages back and forth with the Cardiac Rehab Staff. It is your choice whether you want to use the mobile app or not. We can still do Cardiac Rehab without it, but some patients find it interesting or helpful to use the app. Would you like to use the app?
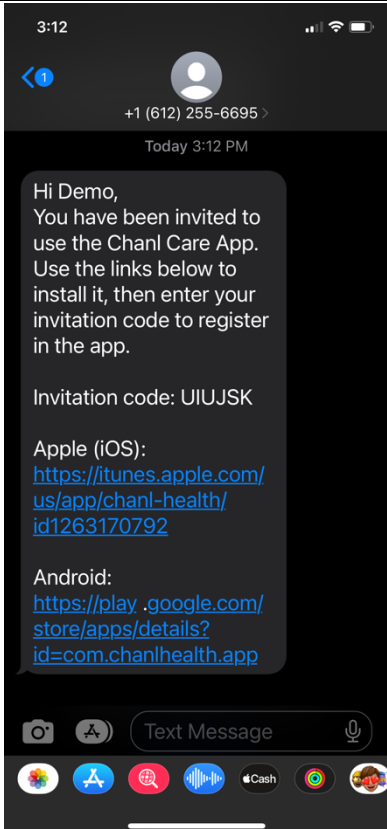
Note that exact screens will vary depending on patient settings.
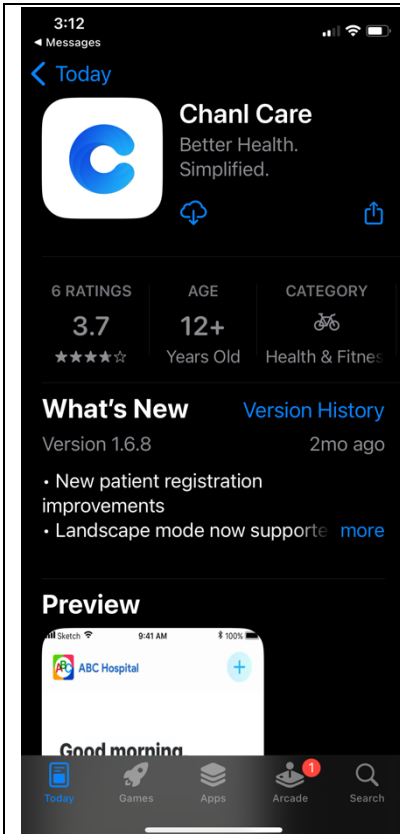
Install Application (Patient)

What is your mobile phone number?

[provider enters mobile phone number into provider dashboard and sends participant text message invitation]
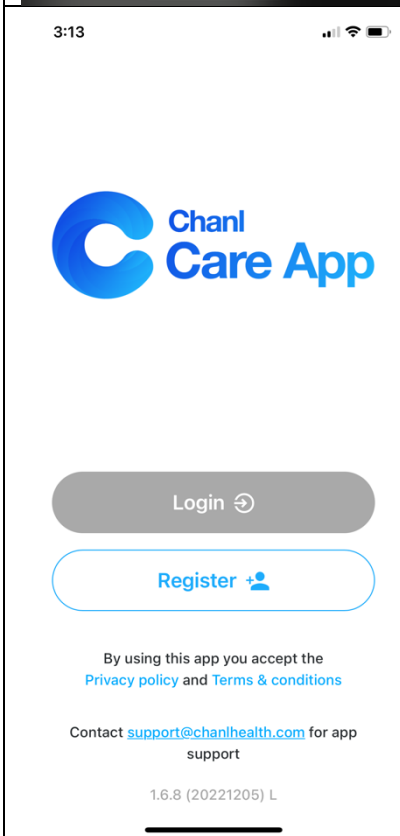
I just sent you a text message. Go to your phone messages.

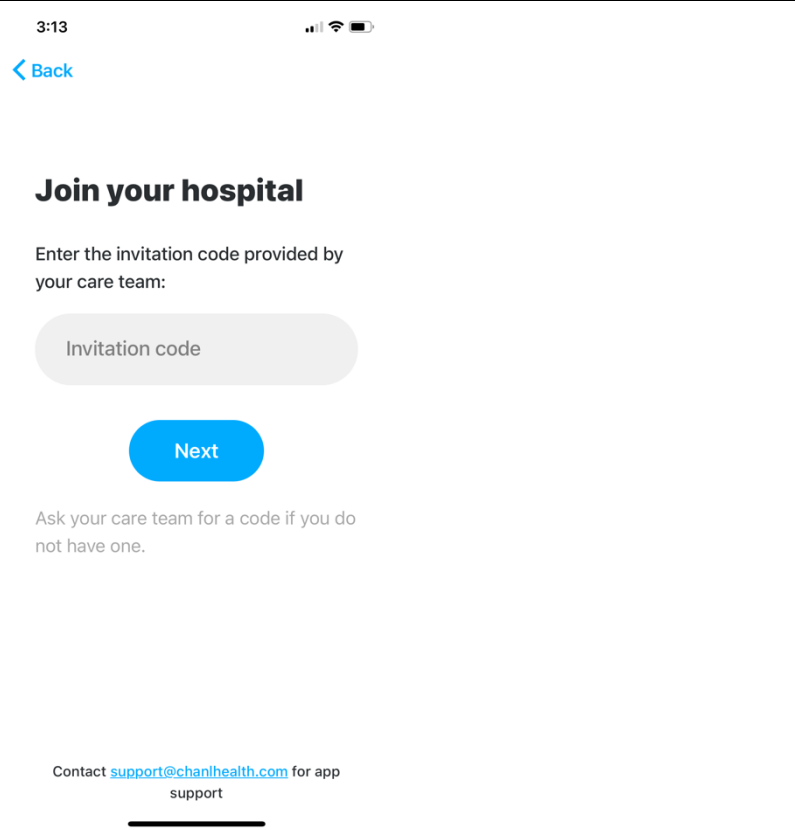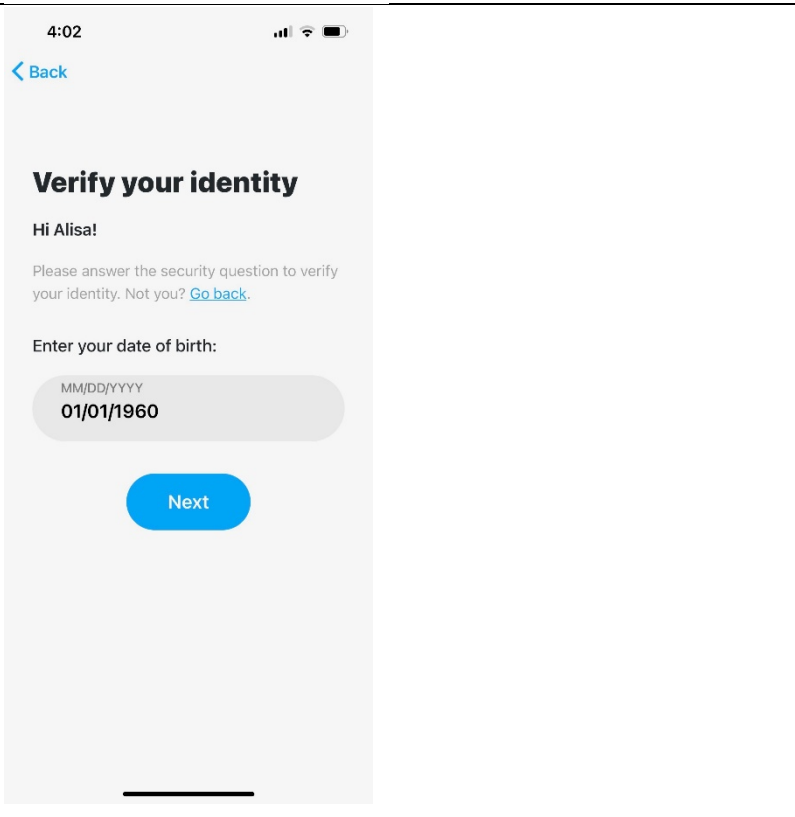| Screen	What to do on screen
3:12 <1 +1 (612) 255-6695 > Today 3:12 PM Hi Demo, You have been invited to use the Chanl Care App. Use the links below to install it, then enter your invitation code to register in the app. Invitation code: UIUJSK Apple (iOS): https://itunes.apple.com/us/app/chanl-health/id1263170792 Android: https://play.google.com/store/apps/details?id=com.chanlhealth.app Text Message	If you have an iPhone, click on the link under Apple. If you have an Android phone, click on the link at the bottom. Other issues that may come up: 1) If the person isn't sure what type of phone, have them show you their phone. 2) If they receive a second text – this is part of the program – they can do that part later. 3) The person may want to copy or write down the invitation code – they will need it later.

		Download the application, then open the application.
		Tap Register.

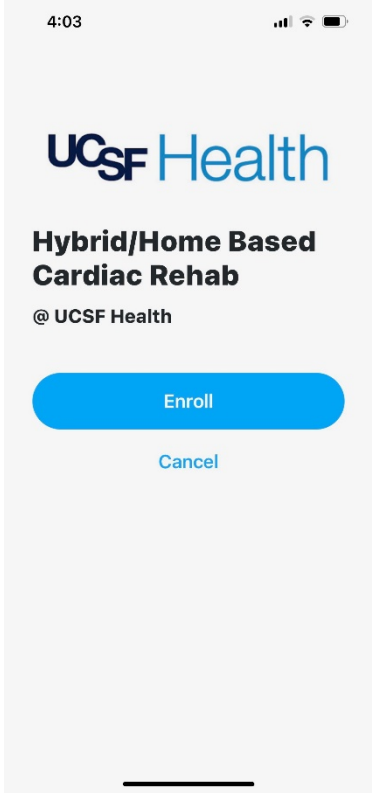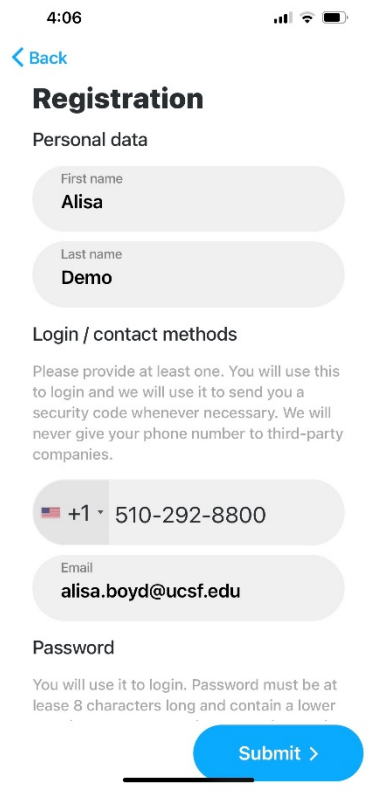|	
3:13 .ıl 🔆 🔋 ‹ Back **Join your hospital** Enter the invitation code provided by your care team: Invitation code Next Ask your care team for a code if you do not have one. Contact support@chanlhealth.com for app support	Enter the invitation code from the text message.
4:02 .ıl 🔆 🔋 ‹ Back **Verify your identity** **Hi Alisa!** Please answer the security question to verify your identity. Not you? Go back. Enter your date of birth: MM/DD/YYYY 01/01/1960 Next	You will be asked to verify your identity – type in your date of birth.

4:03	Tap Enroll.
UCSF Health	
Hybrid/Home Based Cardiac Rehab	
@ UCSF Health	
Enroll	
Cancel	
4:06	Update your registration info. Tap Submit.
❮ Back	
Registration	
Personal data	
First name **Alisa**	
Last name **Demo**	
Login / contact methods	
Please provide at least one. You will use this to login and we will use it to send you a security code whenever necessary. We will never give your phone number to third-party companies.	
🇺🇸 +1 ▾ 510-292-8800	
Email **alisa.boyd@ucsf.edu**	
Password	
You will use it to login. Password must be at lease 8 characters long and contain a lower	
Submit ❯	
	You will get a box asking you to choose whether you want Chanl

Screen	What to do on screen
	to send you notifications. We recommend that you turn notification on. After that, you should see the Today screen.

Orientation to Application

Now I am going to show some of the main features of the application.

Screen	What to do on screen
3:26 **UCSF** Health + **Hi Alexis** Be sure to take some time to breathe and relax this afternoon. **Today** FEB, 28 - 2 TASKS LEFT ✓ **Exercise** > Log your session ✓ **Log vitals** > 0 of 2 completed 📅 Today Progress Messages Resources Settings	This is the main screen for the app – the "Today" screen. In the main part of the screen you will see your tasks, like exercise and logging vitals. At the bottom you will see buttons to help navigate – Today takes you back to this screen, progress shows what you have done, messages lets you chat with the cardiac rehab team, resources includes some education materials, and settings lets you change the app settings.

Task 1 – Enter blood pressure

Now I want YOU to practice using some of the main features of the app. First, I want you to enter a blood pressure. [patient should be interacting with app]

Screen	What to do on screen
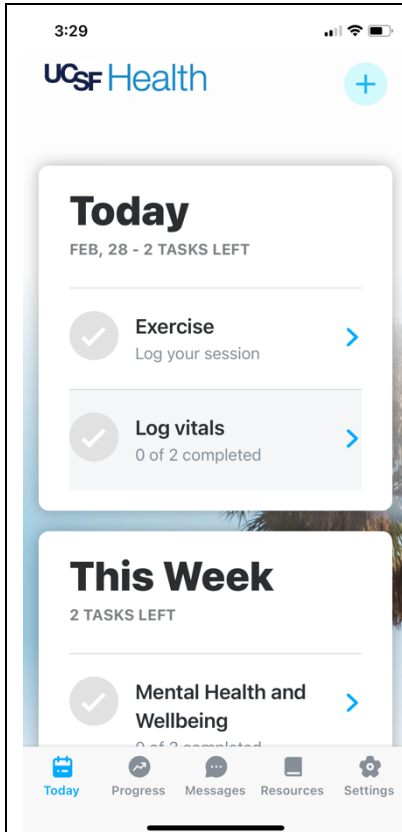
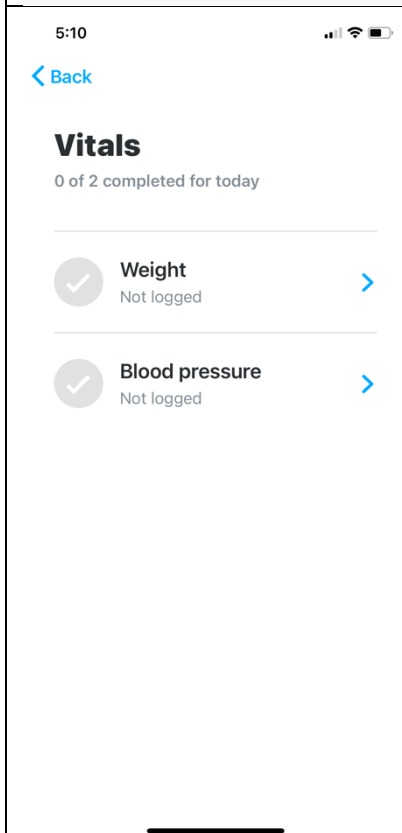|		
		Tap on "Log vitals" in the Today part of the screen.
		Tap on "Blood pressure". You can also log your weight here if you are following your weight.
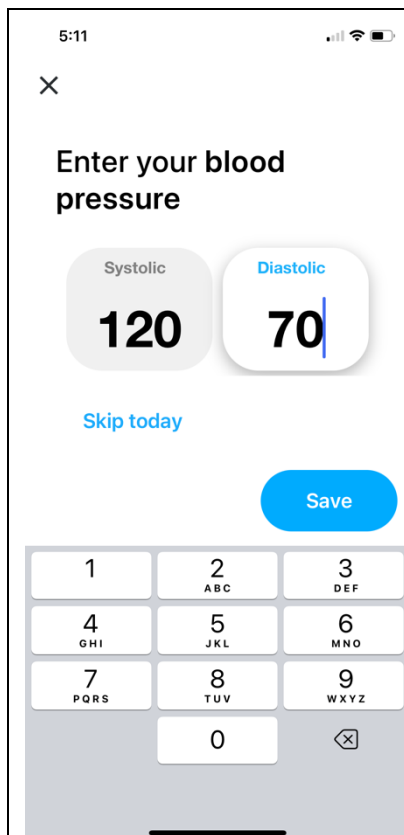
5:11	Enter your systolic and diastolic blood pressure using the keypad. Then tap the blue "Save" button. You may also be asked to enter your heart rate and whether you are sitting or standing.
✕ Enter your **blood pressure** Systolic **120** Diastolic **70** **Skip today** **Save** 1 2 ABC 3 DEF 4 GHI 5 JKL 6 MNO 7 PQRS 8 TUV 9 WXYZ 0 ⌫	
5:11 **‹ Back** **Vitals** 1 of 2 completed for today ✓ **Weight** Not logged › ✓ **Blood pressure** 120 / 70 at 5:11pm ›	Now you see that your blood pressure has been logged. You can use the "Back" button at the top left to go back to the Today screen.
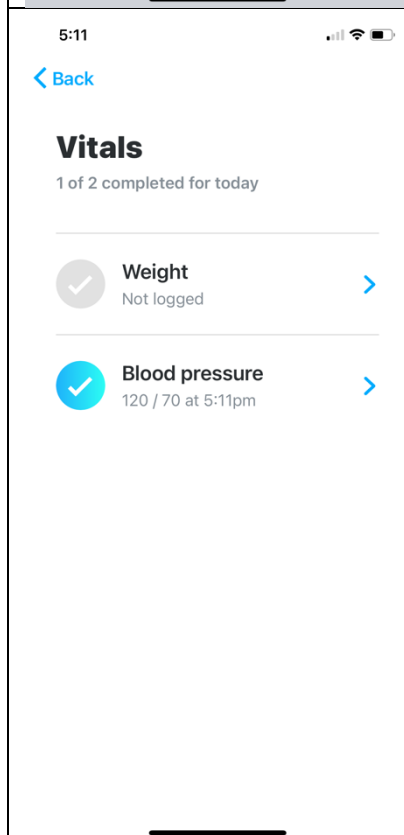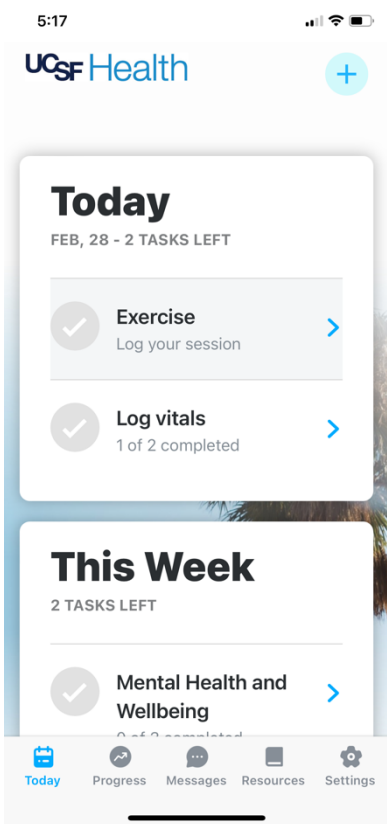
Task 2 – Enter a physical activity session
Next, I want you to enter a physical activity session.
[include step-by-step instructions and screenshots for how the patient enters a physical activity session]

Screen	What to do on screen
	From the Today screen, tap on "Exercise".

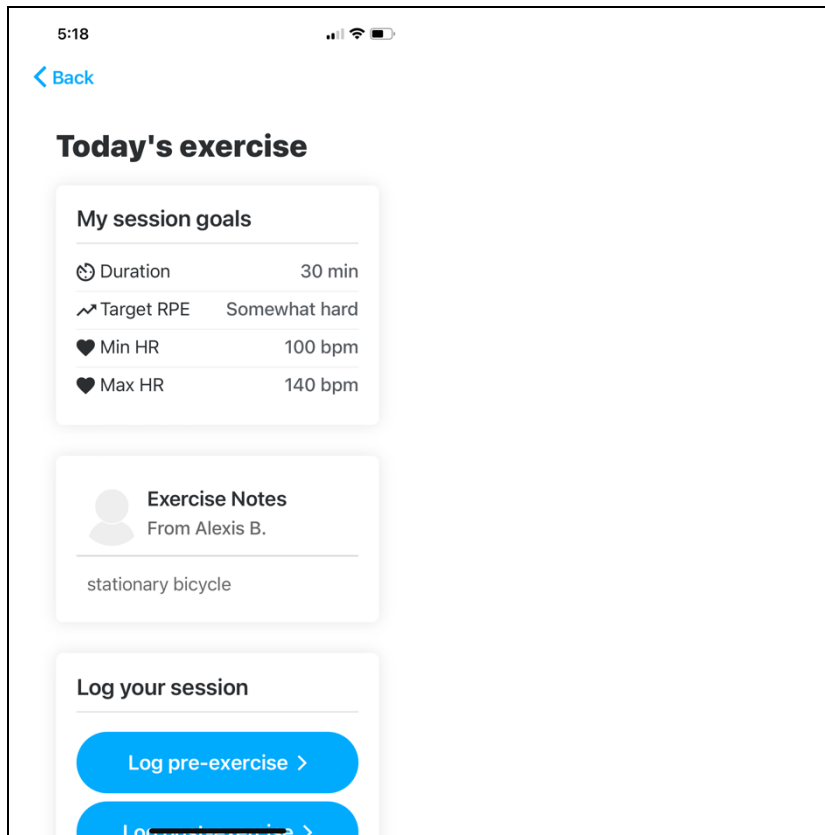|	
5:18	At the top you will see your exercise prescription from your cardiac rehab team.
‹ Back	
Today's exercise	Tap "Log pre-exercise"
My session goals	
⏱ Duration — 30 min	
📈 Target RPE — Somewhat hard	
♥ Min HR — 100 bpm	
♥ Max HR — 140 bpm	
Exercise Notes From Alexis B.	
stationary bicycle	
Log your session	
Log pre-exercise ›	
Log post-exercise ›	
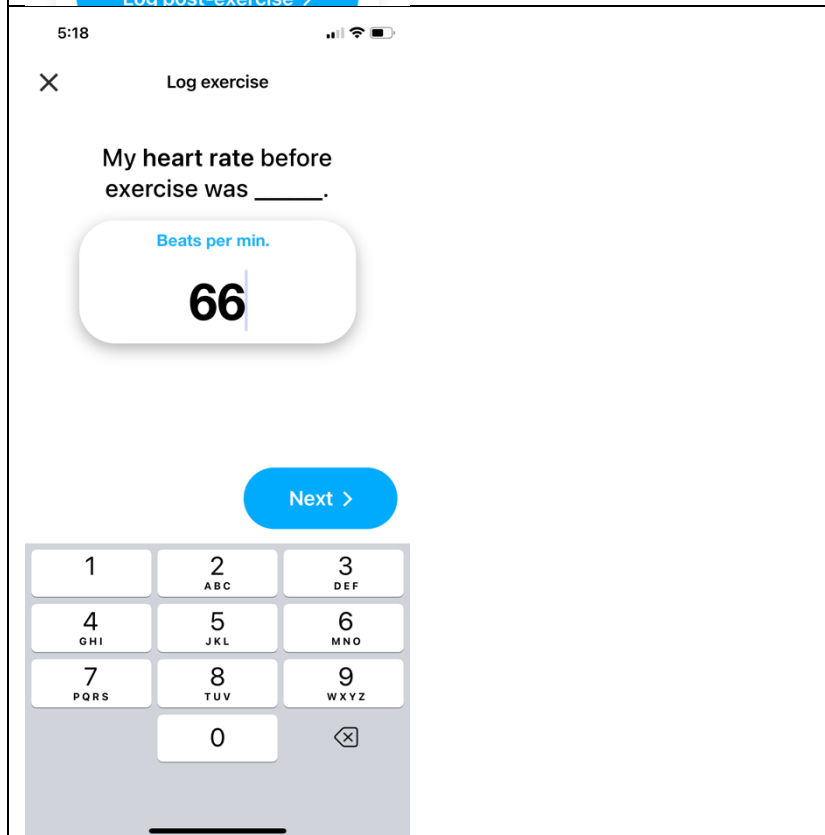
5:18	Enter your pre-exercise heart rate and tap "Next"
✕ Log exercise	
My **heart rate** before exercise was _____.	
Beats per min. **66**	
Next ›	
1	
2 ABC	
3 DEF	
4 GHI	
5 JKL	
6 MNO	
7 PQRS	
8 TUV	
9 WXYZ	
0	
⌫	
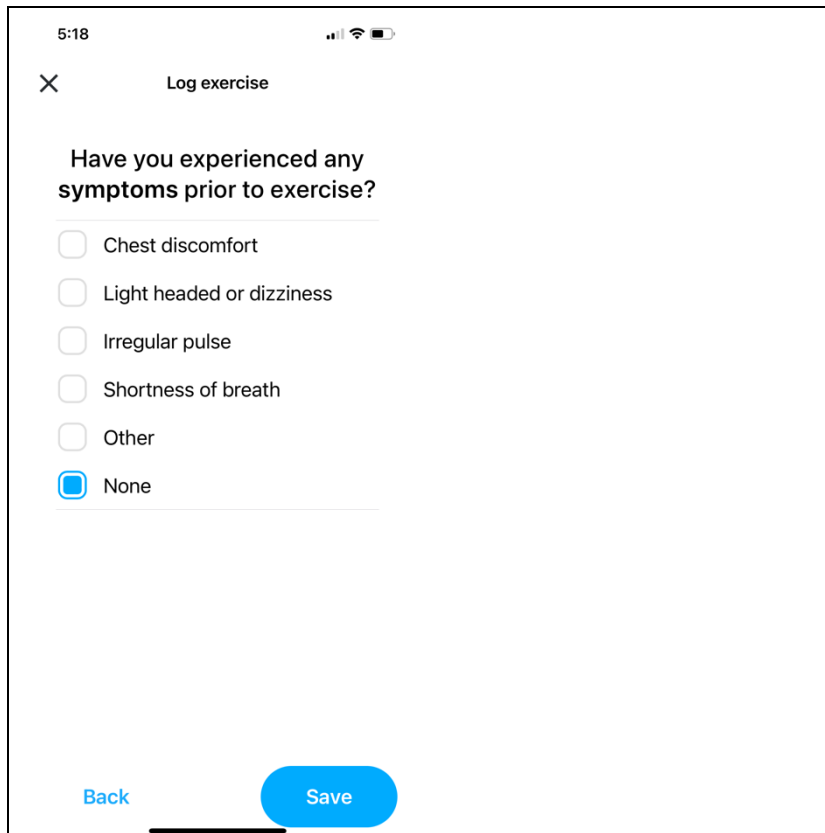
5:18	Enter any symptoms you had before exercise and tap "Save"
✕ Log exercise	
Have you experienced any symptoms prior to exercise?	
☐ Chest discomfort	
☐ Light headed or dizziness	
☐ Irregular pulse	
☐ Shortness of breath	
☐ Other	
☑ None	
Back **Save**	
5:18	Now tap "Log post-exercise"
‹ Back	
Today's exercise	
My session goals	
⏱ Duration 30 min	
📈 Target RPE Somewhat hard	
♥ Min HR 100 bpm	
♥ Max HR 140 bpm	
Exercise Notes From Alexis B.	
stationary bicycle	
Log your session	
Log pre-exercise ›	
Log post-exercise ›	
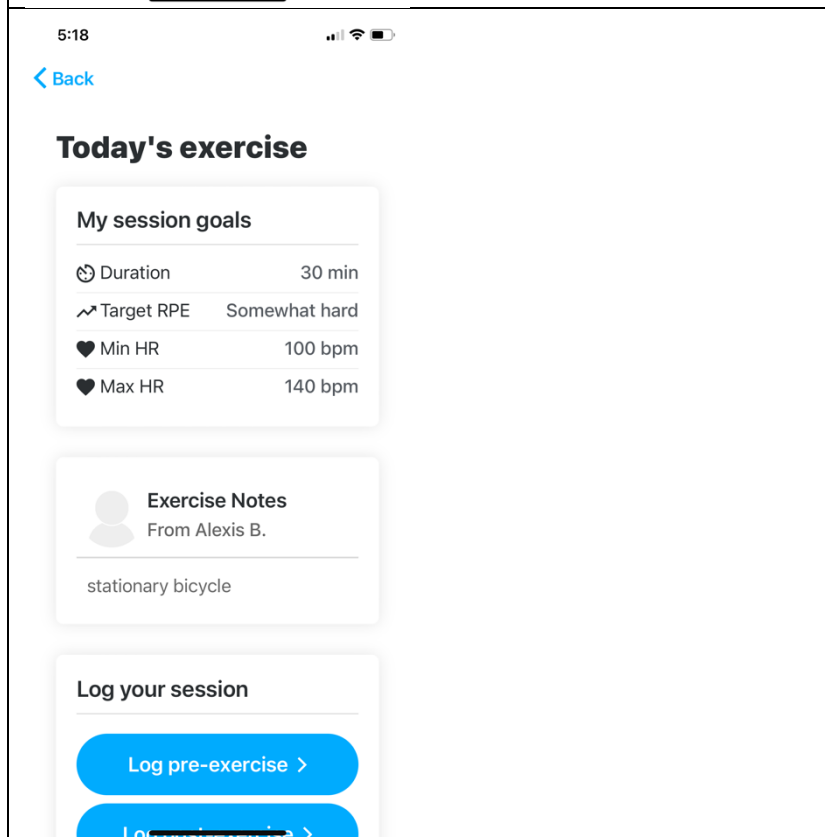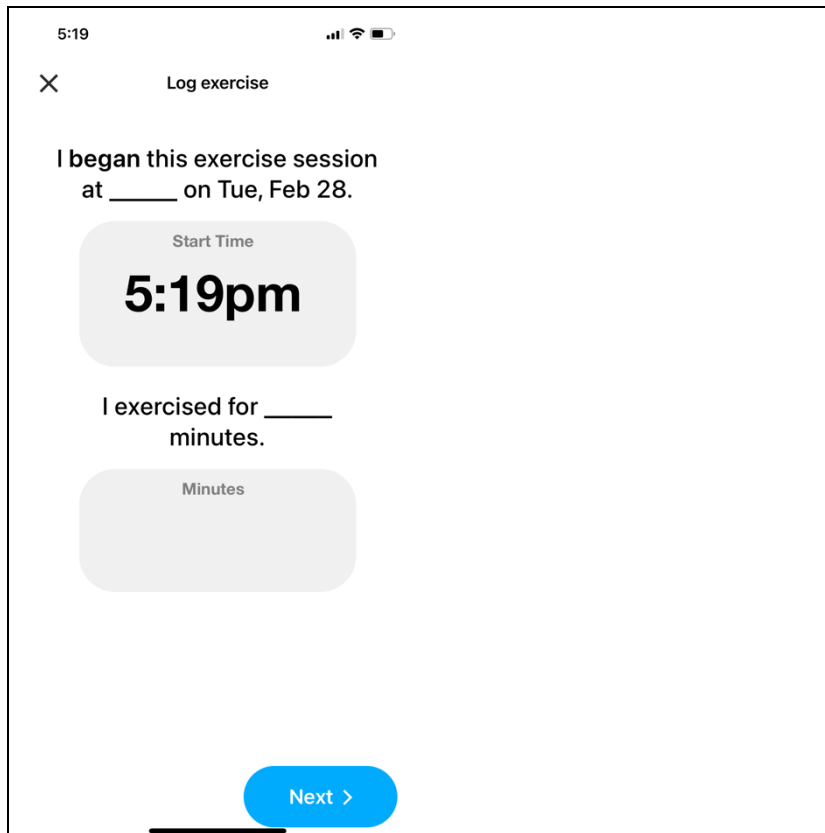
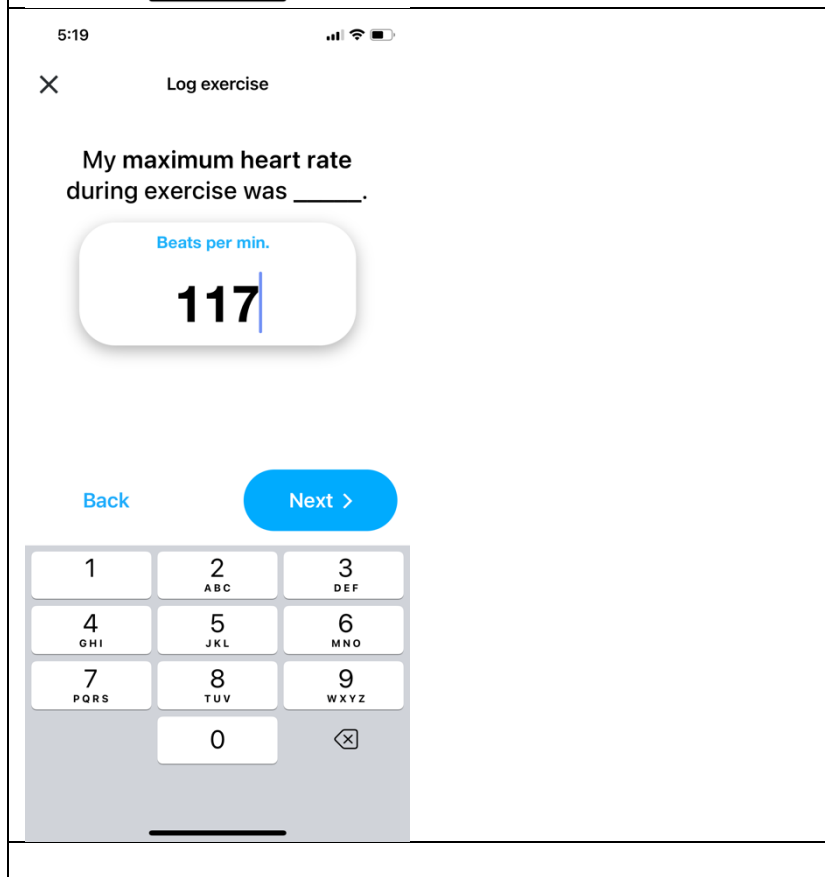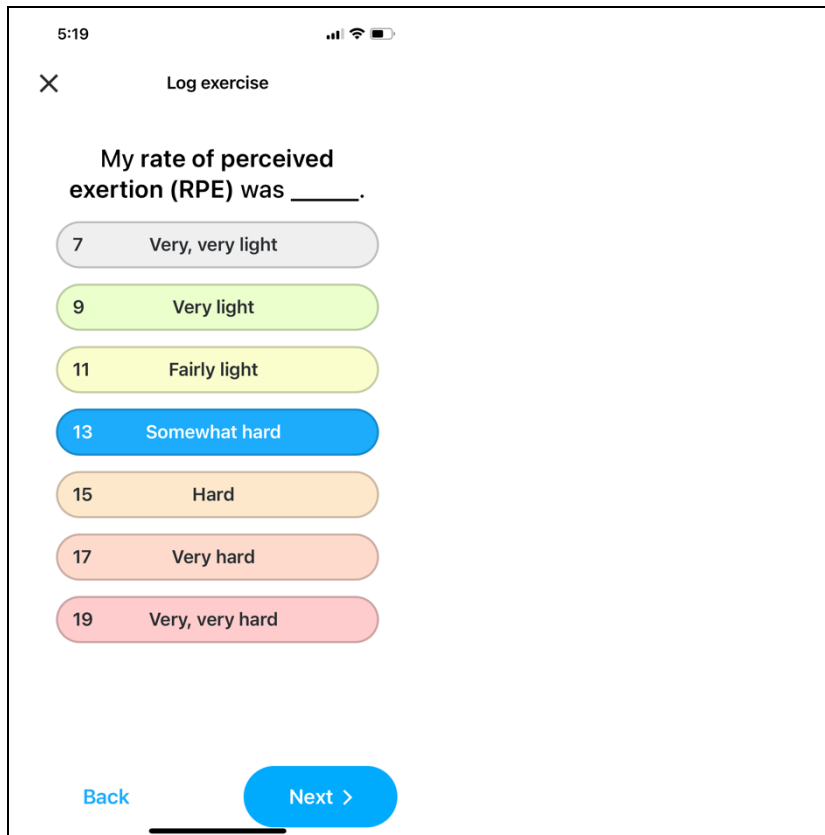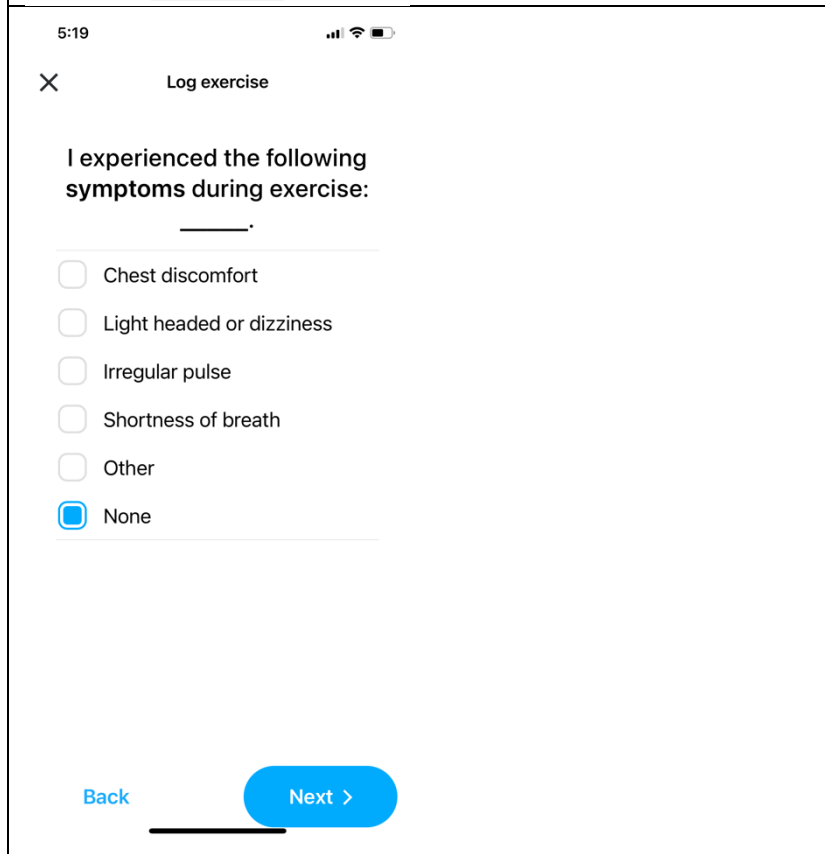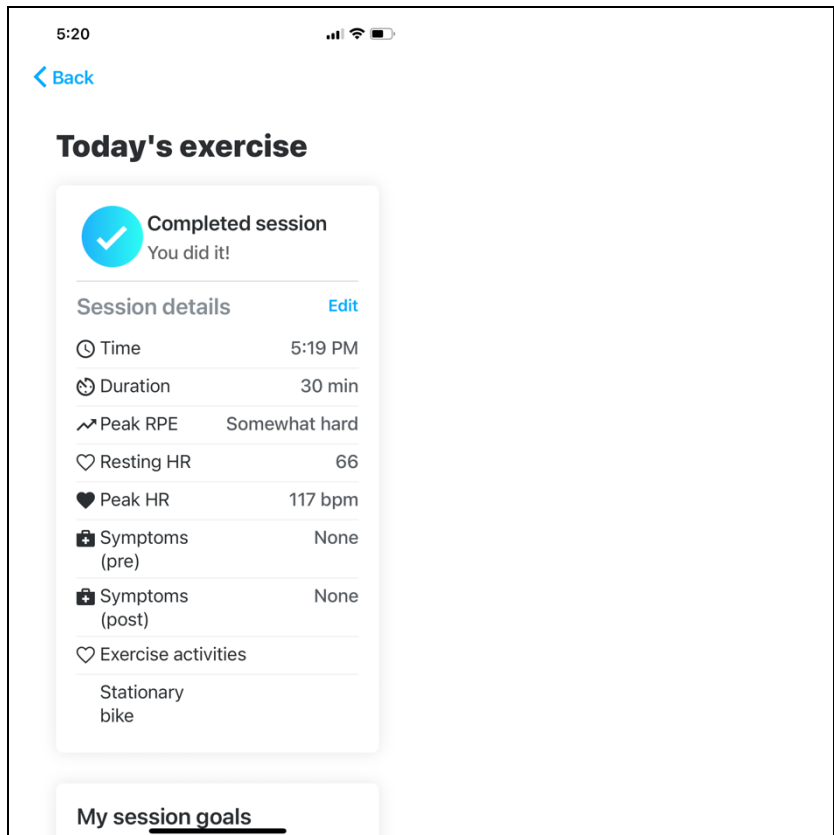|	
5:19 .ıl 🛜 🔋 ✕ Log exercise I **began** this exercise session at _____ on Tue, Feb 28. Start Time **5:19pm** I exercised for _____ minutes. Minutes [Next >]	Enter your number of exercise minutes by tapping in the grey box with minutes in it. If you want to keep track of the time you start exercise, you can. Tap "Next"
5:19 .ıl 🛜 🔋 ✕ Log exercise My **maximum heart rate** during exercise was _____. Beats per min. **117** Back [Next >] 1 2 ABC 3 DEF 4 GHI 5 JKL 6 MNO 7 PQRS 8 TUV 9 WXYZ 0 ⌫	There will be a series of screens to keep entering information and tapping "Next" Enter your exercise heart rate, then tap "Next"

|	Enter your RPE (rate of perceived exertion), then tap "Next"
5:19 .ıl 🛜 ▪️ ✕ **Log exercise** **My rate of perceived exertion (RPE) was _____.** 7 Very, very light 9 Very light 11 Fairly light 13 Somewhat hard 15 Hard 17 Very hard 19 Very, very hard Back Next ›	
5:19 .ıl 🛜 ▪️ ✕ **Log exercise** **I experienced the following symptoms during exercise: _____.** ☐ Chest discomfort ☐ Light headed or dizziness ☐ Irregular pulse ☐ Shortness of breath ☐ Other ☑ None Back Next ›	Enter any symptoms you had during exercise, then tap "Next" You may see other screens asking you for additional information – enter information on those sceens and on the last screen tap "Save."

|	

5:20   ·|| � 🔋
 	
‹ Back
 	
Today's exercise
 	
✓ **Completed session**
    You did it!
 	
Session details   Edit
 	
🕐 Time   5:19 PM
⏱ Duration   30 min
〽 Peak RPE   Somewhat hard
♡ Resting HR   66
♥ Peak HR   117 bpm
🧰 Symptoms   None
    (pre)
🧰 Symptoms   None
    (post)
♡ Exercise activities
 	
    Stationary
    bike
 	
My session goals
	Then it will show you a summary of your session. If anything is missing or doesn't look right, you can tap "Edit" next to Session details.
	
	You can get back to the Today screen from the "Back" button in the upper left hand corner.

Task 3 – View an education module
Next, I want you to view an education module.

Screen	What to do on screen
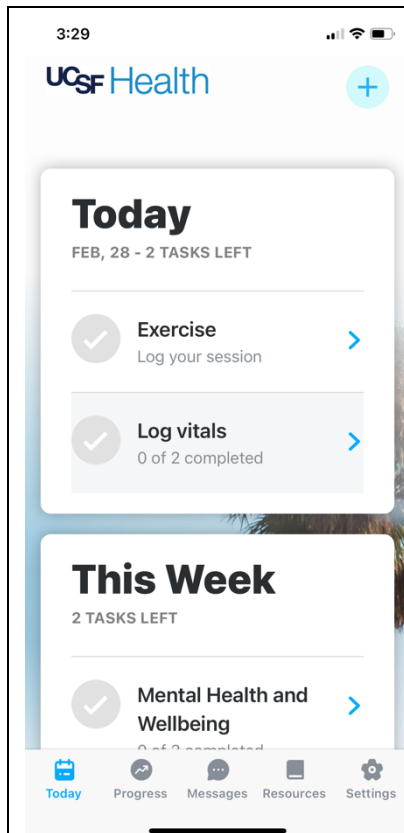
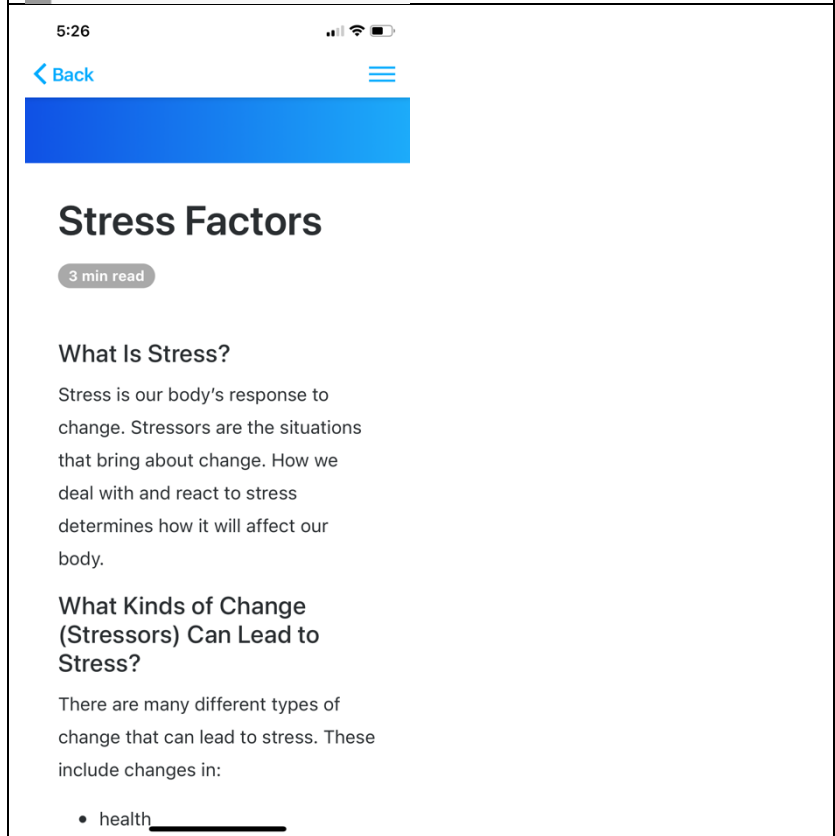|		From the Today screen, tap on one of the tasks in the "This Week" section.
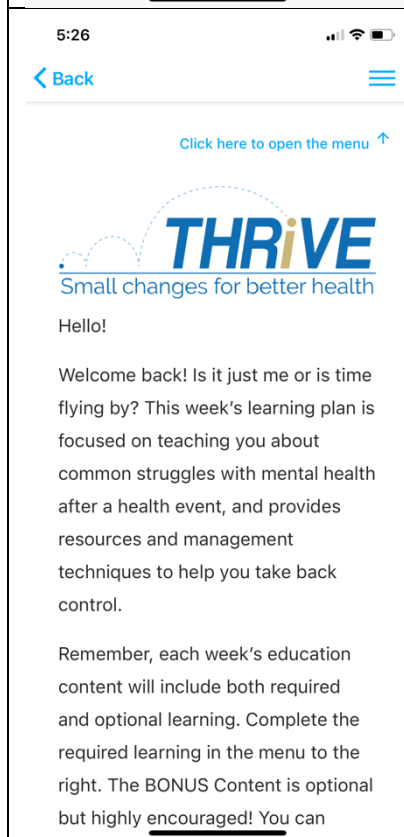
|		You will then see an introduction to an education module. You can get to more articles in the module, by tapping on the menu – the three lines in the upper right hand corner.
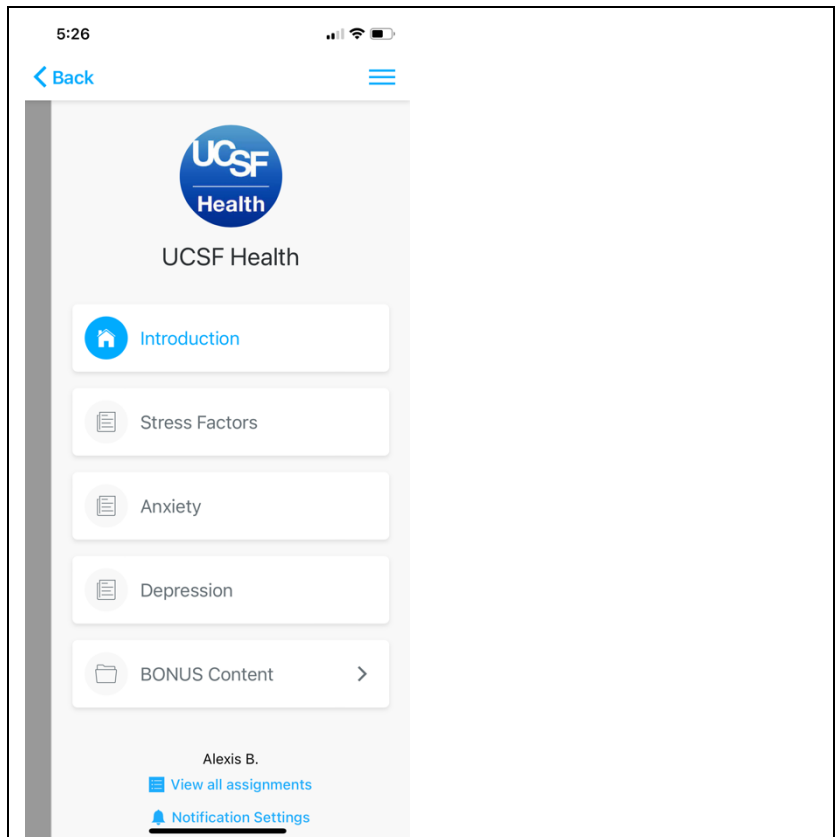
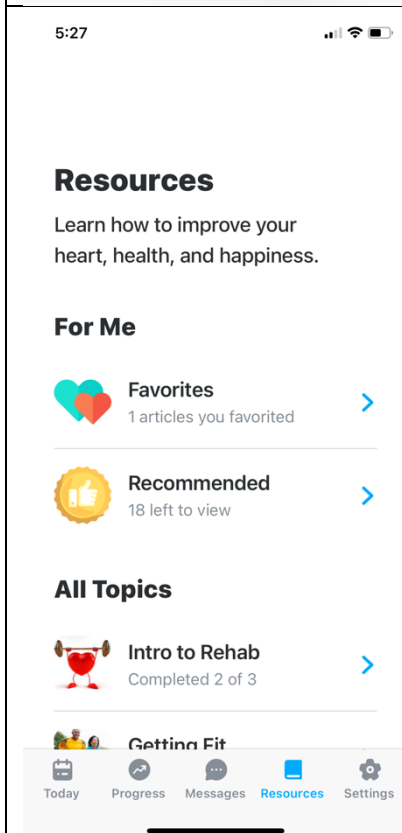|	Tap on one of the boxes to read more about a topic.
5:26 〈 Back ☰ UCSF Health 🏠 Introduction 📋 Stress Factors 📋 Anxiety 📋 Depression 📁 BONUS Content › Alexis B. 📋 View all assignments 🔔 Notification Settings	
5:26 〈 Back ☰ **Stress Factors** 3 min read **What Is Stress?** Stress is our body's response to change. Stressors are the situations that bring about change. How we deal with and react to stress determines how it will affect our body. **What Kinds of Change (Stressors) Can Lead to Stress?** There are many different types of change that can lead to stress. These include changes in: • health_____	The module will tell you more about the topic and about how long it will take. You can tap the "Back" button at the top left to go back to the Today screen or the Menu button at the top right to go to more education modules.
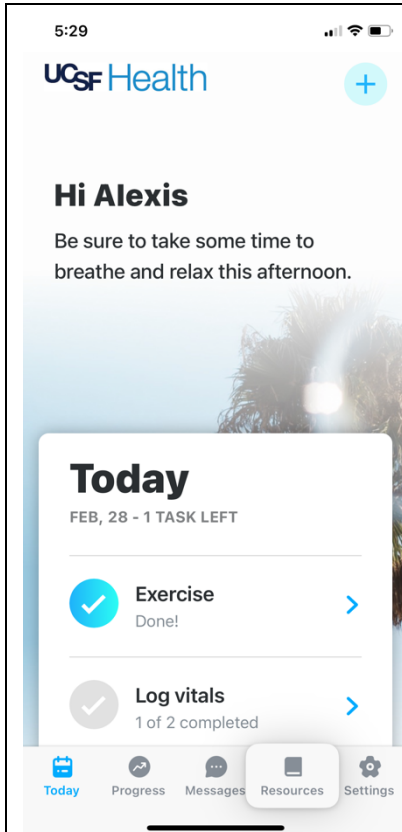
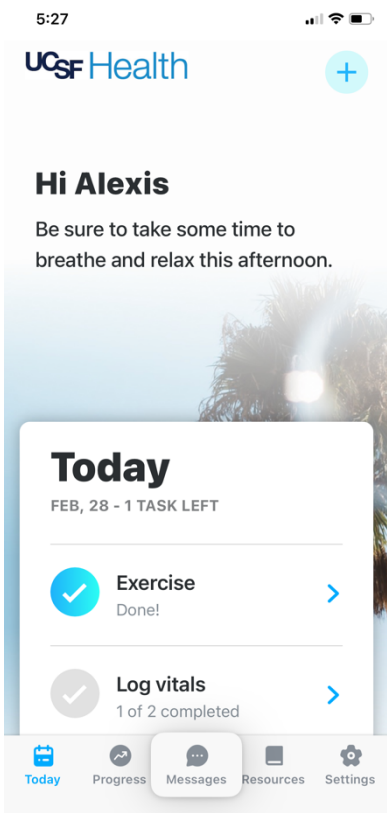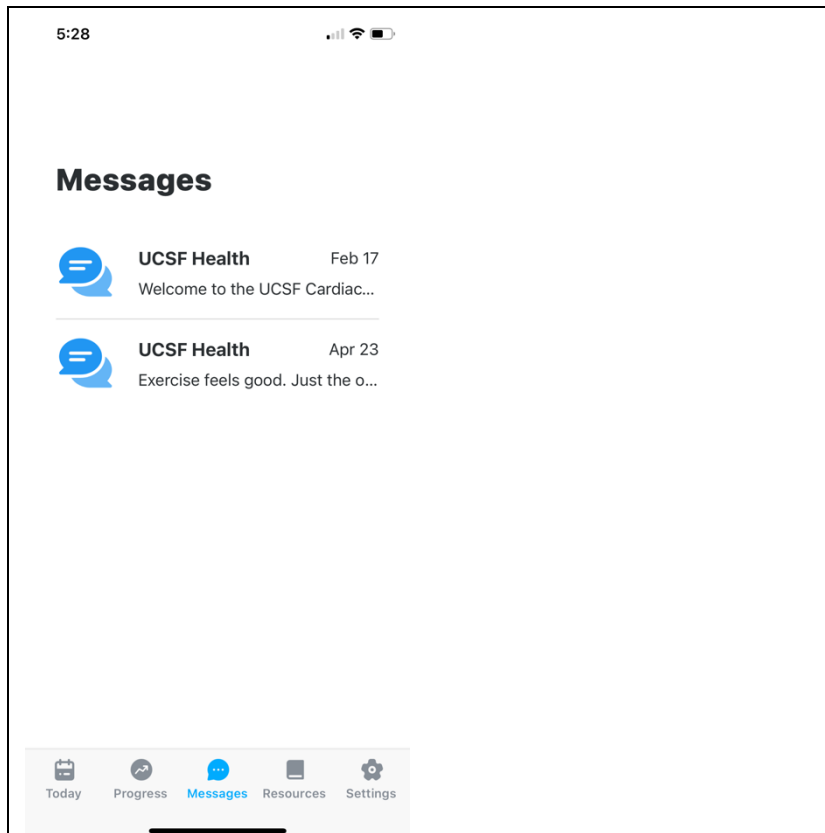|		Go back to the Today screen. From the Today screen, you can also tap on the "Resources" button at the bottom to access more education articles. Tap on Resources.
		Here you can see additional articles.

Task 4 – Send a chat message to CR staff
Next, I want you to send a chat message to the CR staff.

Screen	What to do on screen
	From the Today screen, tap on "Messages" at the bottom.

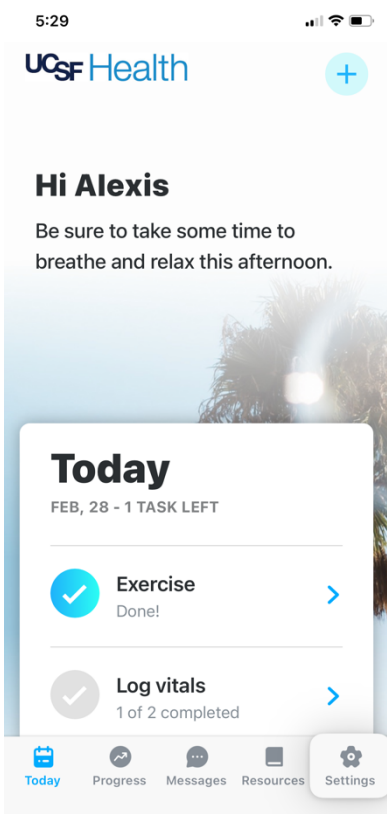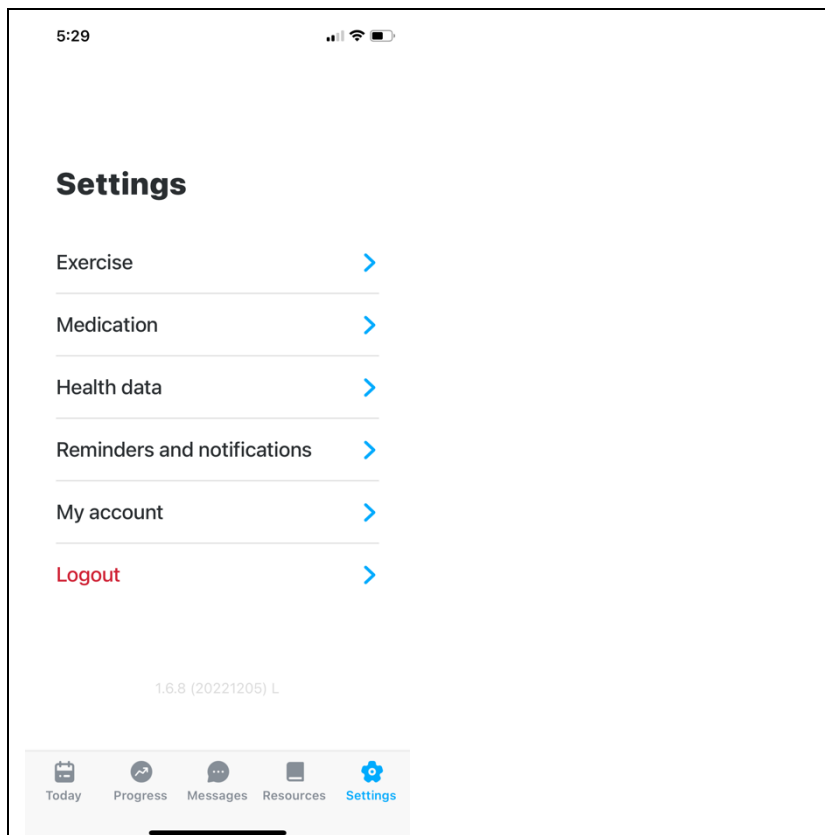|	
Messages 5:28 🔵 **UCSF Health** — Feb 17 Welcome to the UCSF Cardiac... 🔵 **UCSF Health** — Apr 23 Exercise feels good. Just the o... Today · Progress · **Messages** · Resources · Settings	Here, you will see messages from the cardiac rehab team. Tap on the "Welcome to..." message.
5:28 **< Back** — **UCSF Health** — ↻ Welcome to the UCSF Cardiac Rehab and Wellness Center! David J. - Fri, Feb 17, 7:54 AM At our next session, I would like to... ⬆ 1 2 3 4 5 6 7 8 9 0 - / : ; ( ) $ & @ " #+= . , ? ! ' ⌫ ABC · space · return ☺ · 🎤	Here, you can read the message from the cardiac rehab team and send a message to the cardiac rehab team by typing in the box. To send the message, tap the blue button with the arrow.
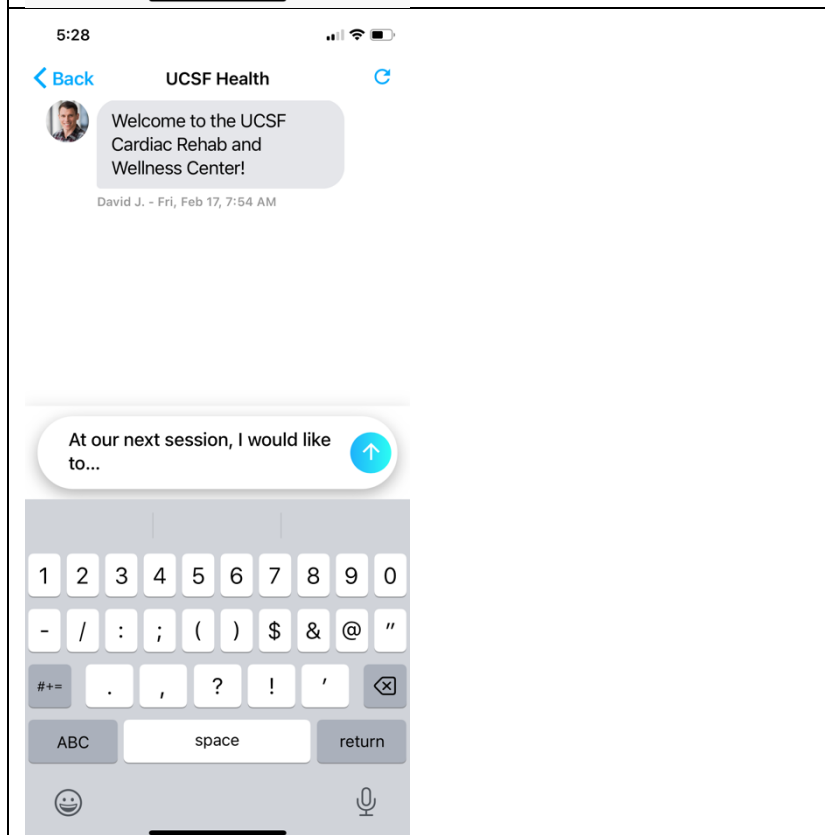
We look at these messages Monday to Friday 9-5. These messages are for non-urgent questions. For example – if would like to send a message about something you want to learn about or talk about at our next session. These messages are not for urgent symptoms like chest pain – remember – if you are having new symptoms or symptoms that you are concerned about, you should follow your safety plan.

Task 5 - Medication Reminders
Would you like to set up medication reminders with the app? The app can remind you to take your medications at certain times of the day.
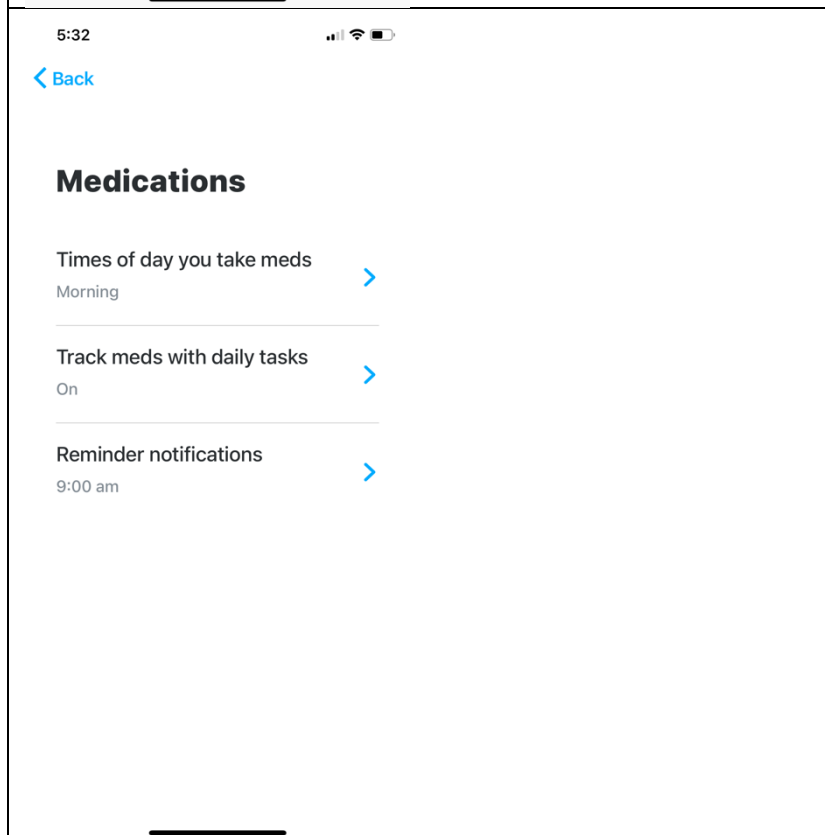
Screen	What to do on screen
	From the Today screen, tap on "Settings" at the bottom.

5:29 .ıl 🛜 🔋 **Settings** Exercise > Medication > Health data > Reminders and notifications > My account > Logout > 1.6.8 (20221205) L Today Progress Messages Resources **Settings**	Here, you can change a lot of settings for the app, like turning notifications and reminders on and off. Tap "Medication"
5:32 .ıl 🛜 🔋 ‹ Back **Medications** Times of day you take meds > Morning Track meds with daily tasks > On Reminder notifications > 9:00 am	Here, you can set the times of day you take meds, whether you want to track meds with your daily tasks on the "Today" screen, and if you want to get reminder notifications.

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5:29 .ıl 🛜 🔋 ‹ Back **Times of day you take meds** Morning ⬤〜 Afternoon ◯ Evening ◯ Night ◯	I set the time of day to Morning, but you can set afternoon, evening, or night, too.
5:30 .ıl 🛜 🔋 ‹ Back **Track meds with daily tasks** Enabled ⬤〜	I enabled tracking meds with my daily tasks.

	And I set a morning reminder for 9AM.
5:29 ◀ Back **Medication reminders** Evening Reminder ○ Hour of reminder 05:00PM Morning Reminder ● Hour of reminder 09:00AM Afternoon Reminder ○ Hour of reminder 12:00PM	

Conclusion
Do you have any other questions about using the app?