Welcome to the PX Connect Community!

PX Connect is an online community designed to improve communication among peers, offer a forum for exchanging ideas and allow members to benefit from the experience, knowledge and wisdom of others. PX Connect is open to all members of The Beryl Institute and is intended for discussion of issues related to the patient experience, service excellence, patient and family engagement, patient advocacy and questions for patient experience leaders.

PX Connect offers enhanced discussion capabilities, improved member directory search, granular privacy controls, centralized subscription management and resource sharing.

As a member, you will have the opportunity to post questions, share knowledge and have the option to get posts in real-time, daily digest or not at all. You will have the flexibility to collaborate when you need or want to and on whatever device. The site features responsive design so it automatically formats for the device you are on, whether it be a desktop, phone or tablet. All resources, discussions and documents are archived and easily searchable.

We look forward to your engagement with the PX Connect Community. If you have questions or would like additional information, please reach out to Michelle Garrison, Director, Member Experience at michelle.garrison@theberylinstitute.org or at 866.488.2379 x 700.

pxconnect.theberylinstitute.org
# TABLE OF CONTENTS

## TOPICS

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logging into PX Connect</td>
<td>3</td>
</tr>
<tr>
<td>Updating your Profile</td>
<td>4</td>
</tr>
<tr>
<td>Managing Your Notification Settings</td>
<td>5</td>
</tr>
<tr>
<td>Posting a Discussion</td>
<td>6</td>
</tr>
<tr>
<td>Replying to a Discussion</td>
<td>7</td>
</tr>
<tr>
<td>Making Connections</td>
<td>8</td>
</tr>
<tr>
<td>Accessing Library Entries</td>
<td>10</td>
</tr>
<tr>
<td>Uploading Library Entries</td>
<td>11</td>
</tr>
<tr>
<td>Frequently Asked Questions</td>
<td>13</td>
</tr>
</tbody>
</table>
LOGGING INTO PX CONNECT

Navigate your browser to http://pxconnect.theberylinstitute.org.

Enter the username and password you use for your membership with The Beryl Institute and click Sign In.

Once you have signed in, you will be automatically redirected back to the PX Connect site. The first time you log in, you will be asked to accept the Community Rules and Guidelines. Once you accept the guidelines, you will be able to begin engaging in the community.

Can’t remember your password? Click on Click here to reset your password or contact the Institute at info@theberylinstitute.org for additional assistance.
UPDATING YOUR PROFILE

Once you are logged into PX Connect, we encourage you to update your profile so that the community can learn more about you. You can share information such as:

• Your Photo
• Contact Information - this information has been added from your profile with The Beryl Institute. If you have updates, click on the pencil icon to make the change.
• Social Links (i.e. LinkedIn, Facebook, Google+)

UPLOADING YOUR PHOTO

Start by selecting ACTIONS under the picture on the profile.

Click on Change Picture and browse your device to the correct file to add a photo of yourself.

Once your picture is loaded using the screen prompts, select SAVE.

REVIEW YOUR CONTACT DETAILS

This information was automatically entered when the Community was established. If you want to make any additions, click on the “pencil” icon to edit.

SOCIAL LINKS

Next, you can choose to ADD links to your social media accounts. Upon the selection of each social media account, you will need to enter the link.

Try to fill out your profile to receive 100% completion.
MANAGING YOUR NOTIFICATION SETTINGS

CONFIGURE YOUR NOTIFICATION SETTINGS

While you are still in your profile, navigate to your MY ACCOUNT menu options > select COMMUNITY NOTIFICATIONS

Under NOTIFICATION SETTINGS, setup your email preferences should you wish to override the default settings.

Here you will only see the communities you belong to.

You will have the option to select from the following notification settings:

- **Real Time** – One email for each message as it is posted to the community
- **Daily Digest** – One email containing all posted messages from the previous day
- **No Email** – Opt-out of receiving email messages from this community

The default setting for all communities is set for Daily Digest. This will arrive in your inbox at the beginning of each day.
POSTING A DISCUSSION

Now that your profile is complete, you are ready to start your first discussion post. There are a variety of options to get started.

1. On the menu bar, click on **PARTICIPATE** and select **POST A MESSAGE**.

2. Navigate to the community you would like to start the discussion post in. You will see the **LATEST DISCUSSION POSTS**. Click on **ADD** to begin a new discussion.

3. Select the Community group you would like to post TO (can only post to communities you belong to)

4. Select another Community group using the **Cross Post To** options to post to more than one Community. (You will only be able to cross post to other communities you are a member of.)

5. Type an appropriate and concise **Subject line**.

You will have the option to attach files to your posting if you have a document or resource you would like to share.
When replying to a discussion post, you have two options:

- **REPLY TO DISCUSSION** (all Community members will receive your response)
- **REPLY TO SENDER** (only the sender will receive your response)

While reading the discussion, you can simply select the **REPLY TO DISCUSSION** option, or access additional menu options under the down arrow (see below) to choose to **REPLY TO SENDER**. Also under this menu you have the option to **PRINT MESSAGE** or **EDIT**. You will only have the option to **EDIT** if you are the author of the post.

After selecting **REPLY TO DISCUSSION** or **REPLY TO SENDER** the site will be directed to the **POST REPL Y** page (see below). The **POST REPL Y** page works just the same as the **POST A MESSAGE** page except the To, From, and Subject fields are pre-filled and cannot be modified. The Subject field however can be edited ONLY when you choose to **REPLY TO SENDER**.

If you choose to include a link with your response, select the **YES** under the Subject line to include a preview of the link.

At this time, you also have the option to add Attachments with your response (images, files, etc). After you have composed your response, select **SEND**.
MAKING CONNECTIONS - OPTION 1

There are two options to connect with other members:

OPTION 1:

Select **COMMUNITIES** on the main menu bar.

Select **MY COMMUNITIES** > select the community you would like to browse

You can access a complete **MEMBER** list once you have selected your Community (see above) and by selecting the **MEMBERS** tab (shown below). Scroll down on the page to browse all community members within your community. You will also have the option to search by name and company name.

You will want to connect with other members to learn from one another. This is a valuable aspect of using this resource. Select **ADD AS CONTACT** next to the member you would like to connect with.

Once you select **ADD AS CONTACT**, the member will receive a message and will have the opportunity to approve the connection request.
OPTION 2:

You can also search for members in the DIRECTORY. When selected, the site will direct you to the Member Directory. You will only be able to connect with members in the communities you belong to.

Here you will also have the option to search by name and company name as you did with Option 1. Once you are ready to connect with another member, select ADD AS CONTACT.
ACCESSING LIBRARY ENTRIES

Each Community has its own Learning Library. The Library is a place for community members to share important documents, templates and resources with other members. The Library Entries files can be accessed by selecting BROWSE on the menu bar, then selecting LIBRARY ENTRIES.

Libraries can also be accessed through specific communities. Navigate to the selected community and then click on the LIBRARY button.

Once you have navigated to the LIBRARY ENTRIES, you can browse through the files, download files and create new library entries to upload files. To download a file, click on the DOWNLOAD button, and your file will download to your computer’s download folder.
1. Select the **Create New Library Entry** action.

2. Type a **Title** and **Description** for your Library item.

3. Select the appropriate **Community Group** to post your Library item to.

4. Select **Entry Type** (i.e. Copyright Licensed Files, Hyperlink, Standard File Upload, Webinar, YouTube)

5. Select **NEXT**

6. **Choose And Upload** (browse your device)
7. Select **NEXT** to add an additional description to your file uploads (If more than one file was selected, you will be given the choice to arrange the order in which your uploads will be loaded and displayed.)

8. Select **FINISH** to upload your file(s)

After selecting **FINISH** to upload your file(s), you will be given several options to manage your file uploads:

a. Additional **ACTIONS** (i.e. Add to Favorite, Share, create a Permalink)

b. **Delete Uploads**

c. Add **Tags** and **Keywords** to improve the search functionality

d. Add any **Related Entries and Links**
FREQUENTLY ASKED QUESTIONS

Q: How many communities are there?
A: Currently there are 5 communities: 1 general discussion and 4 Special Interest Communities: Patient Advocacy, Pediatric, Patient and Family Advisors and Physician. Additional communities will be added as the community starts to grow.

Q: What community(s) do I belong to?
A. All members belong to the overall community and can post to the General Discussion community. Members have the option to join select Special Interest Communities.

Q: What can I do within the community(s) I belong to?
A: You can make connections, share documents, start discussions and post responses.

Q: When I post a message how do others know?
A: Members of each community by default are set up to get a daily digest of all postings.

Q: Can I change when I am notified of new discussion postings?
A: Certainly. You will do this in your profile>My Account>Community Notifications. You can select Daily Digest, Real Time emails or no emails.

Q: Can I reply to postings?
A: You can reply to the entire community (Reply to Discussion) or only to the person (Reply to Sender) that posted the message. See page 6 on the guide for more information on how to reply.

Q: Are these discussion and replies archived and searchable?
A: All discussion posts and replies are archived and easily searched. This search functionality means that you can search the PX Connect Community for information you need and find a solution without having to post anything.

Q: Can we add new communities?
A: At this time, we are not adding communities. If you have a new community you would like to add, please reach out to Michelle Garrison at michelle.garrison@theberylinstitute.org for more information.

Q: I used to be subscribed to the PX Listservs. Are they still available?
A: The PX Leaders listservs have been discontinued and have been transitioned to the PX Connect Community.

Q: I have additional questions. Where can I get more information?
A: You can visit the Frequently Asked Questions section of PX Connect or contact us at info@theberylinstitute.org for assistance.