THE BERYL INSTITUTE

PX Connect
Engage with the Patient Experience Community

LEARN. SHARE. COLLABORATE.

Join discussion groups related to patient experience, service excellence, patient and family engagement, patient advocacy and more.

JOIN THE DISCUSSION

LATEST DISCUSSIONS	LATEST NEWS	RECENT SHARED FILES

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. This platform 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, 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 Kayleigh Bentley, Manager, Community Experience, **kayleigh.bentley@theberylinstitute.org**, 866.488.2379 ext 715.

THE BERYL INSTITUTE

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TOPICS

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**.
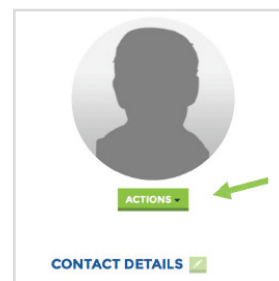
REVIEW YOUR CONTACT DETAILS

This information was automatically entered when the Community was established. If you want to make any additions, click on the "**pencil**" icon to edit.
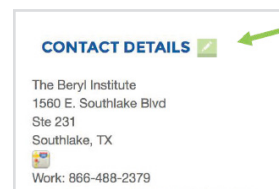
SOCIAL LINKS

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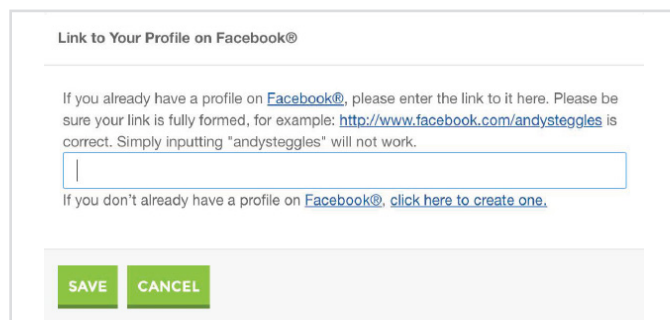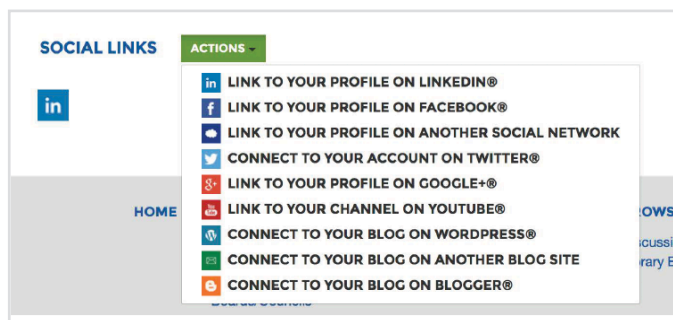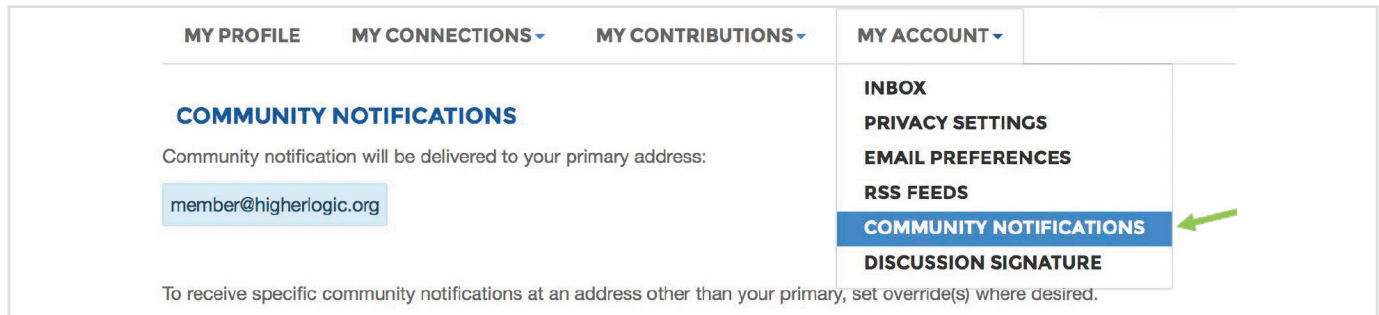
Try to fill out your profile to receive 100% completion.
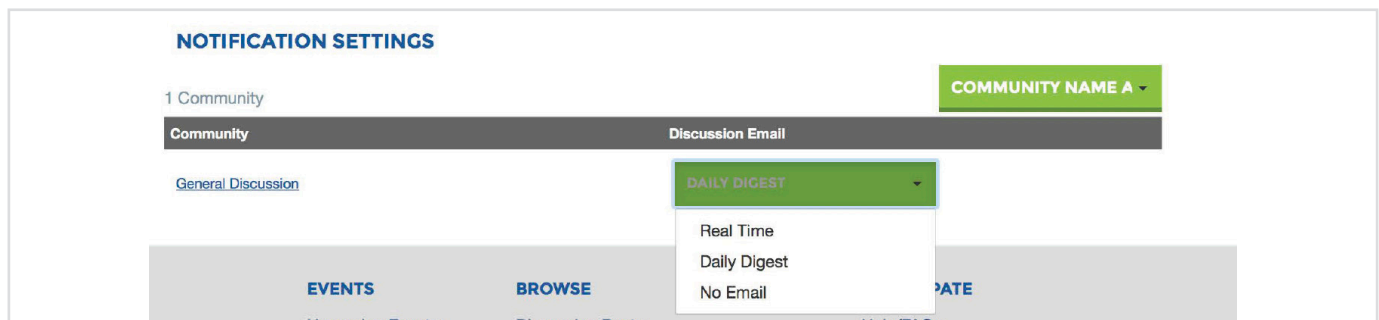
MANAGING YOUR NOTIFICATION SETTINGS

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.

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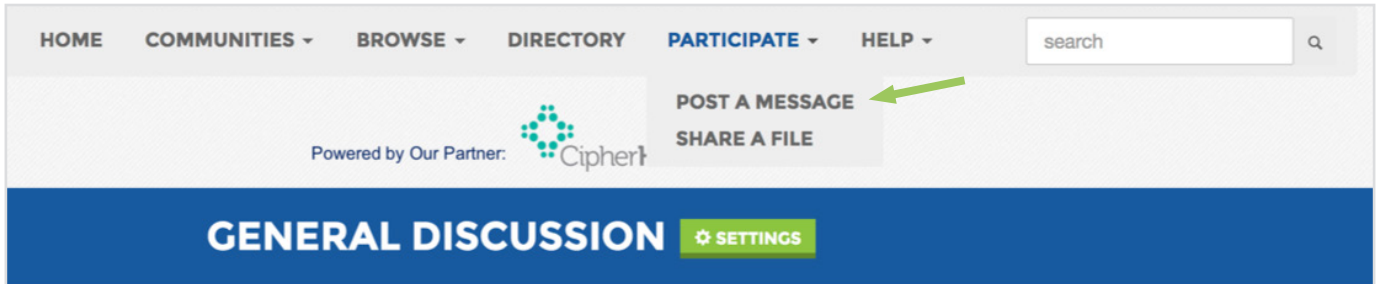
2. Navigate to the community you would like to start the discussion post in. You will see the **LATEST DISCUSSION POSTS**. Click on **ADD** to begin a new discussion.

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.

REPLYING TO A DISCUSSION

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)
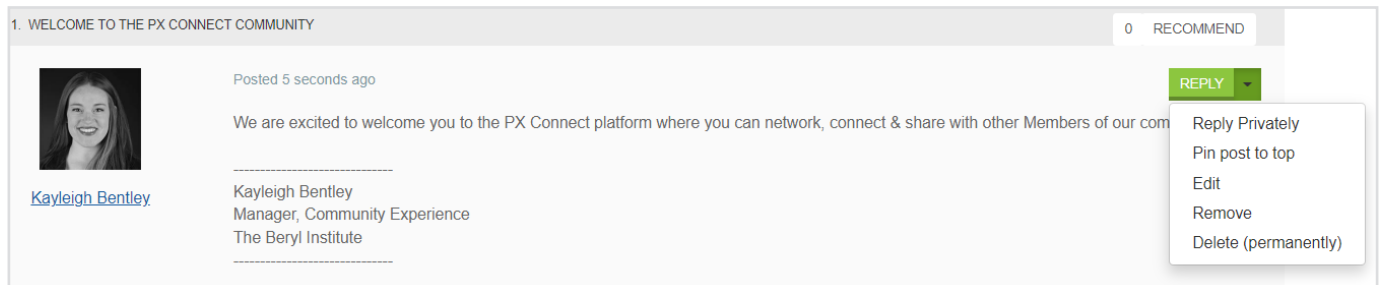
While reading the discussion, you can simply select the **REPLY** option, or access additional menu options under the down arrow (see above) to choose. Also, under this menu you have the option to **REPLY PRIVATELY**, **PIN POST TO TOP**, **EDIT**, **REMOVE** or **DELETE PERMANENTLY**. You will only have the option to **EDIT** if you are the author of the post.

After selecting the option to reply to a post, a response box appears with some text formatting options (bold, italic, underline, etc.) as well as options to attach photo or video files and hyperlinks. (See screenshot on next page).

You also have the option to **EDIT YOUR DEFAULT SIGNATURE** here, if you would like to change it based on the discussion post.

When you're ready to post your reply, you have multiple options. You can **CANCEL** the posting, **SAVE AS DRAFT, SCHEDULE** to post at a later time, or **POST** immediately.
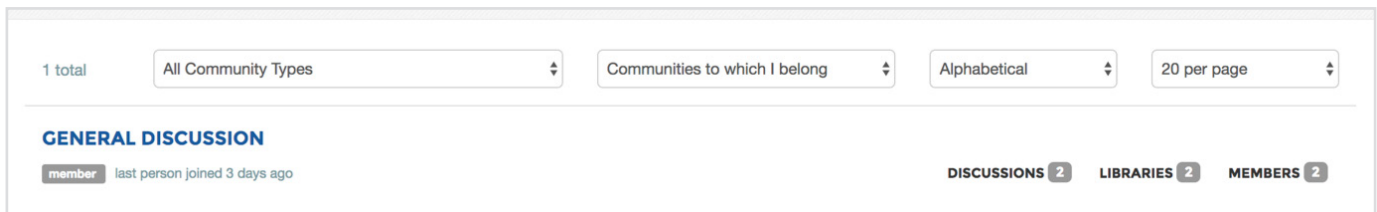
MAKING CONNECTIONS - OPTION 1

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

1 total	All Community Types ⬍	Communities to which I belong ⬍	Alphabetical ⬍	20 per page ⬍

GENERAL DISCUSSION

member   last person joined 3 days ago   DISCUSSIONS **2**   LIBRARIES **2**   MEMBERS **2**
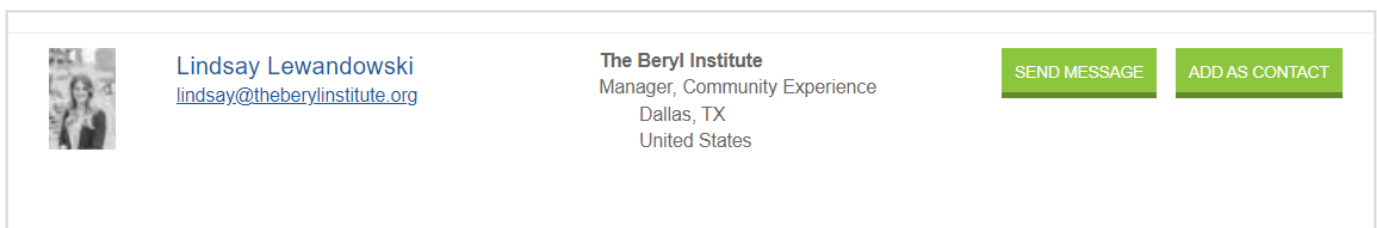
You can access a complete **MEMBER** list once you have selected your Community (see above) and by selecting the **MEMBERS** tab (shown below). Scroll down on the page to browse all community members within your community. You will also have the option to search by name and company name.

COMMUNITY HOME	DISCUSSION **0**	LIBRARY **9**	EVENTS **0**	MEMBERS **1.2K**

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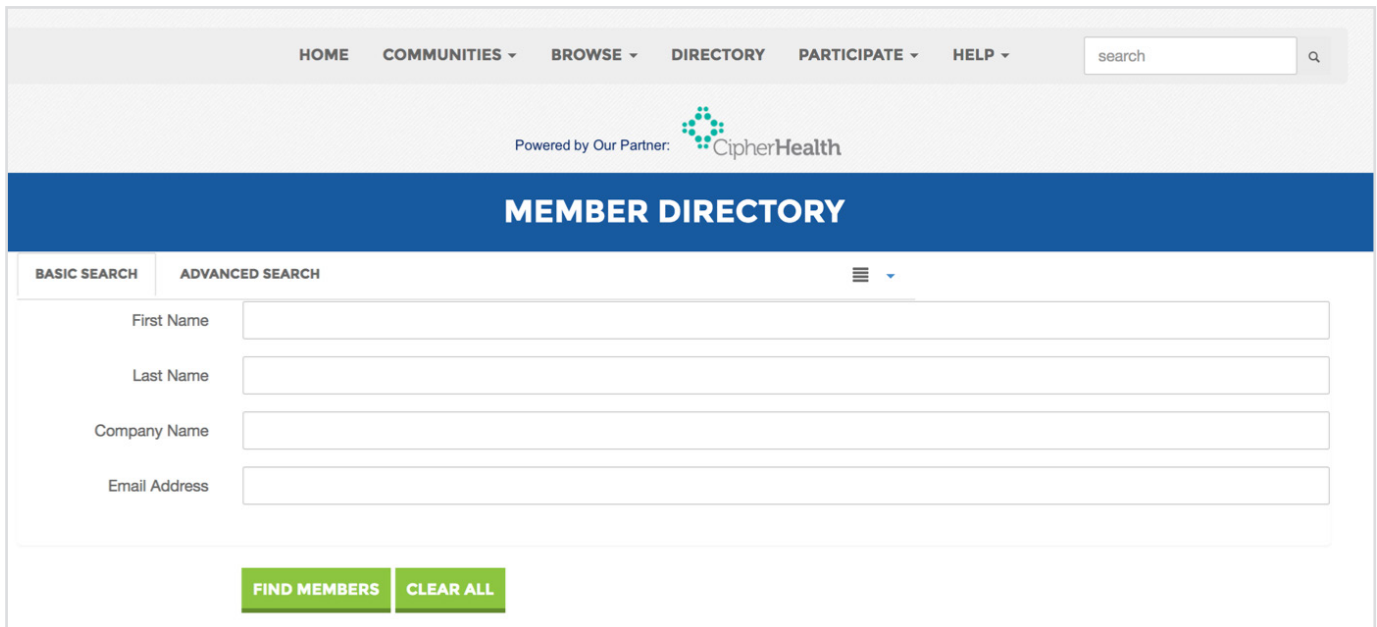
Once you select **ADD AS CONTACT**, the member will receive a message and will have the opportunity to approve the connection request.

Lindsay Lewandowski
lindsay@theberylinstitute.org

The Beryl Institute
Manager, Community Experience
Dallas, TX
United States

SEND MESSAGE   ADD AS CONTACT

MAKING CONNECTIONS - OPTION 2

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**.

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**.
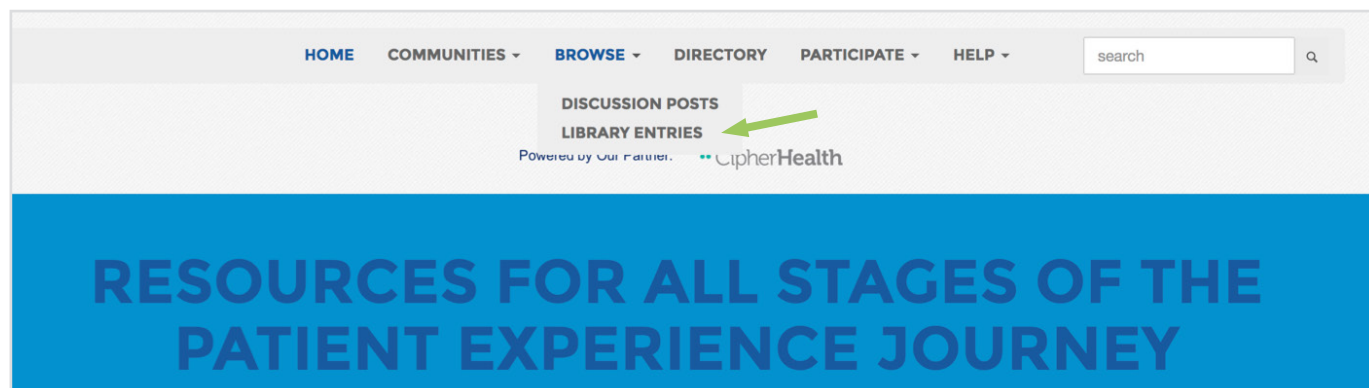
Libraries can also be accessed through specific communities. Navigate to the selected community and then click on the **LIBRARY** button.
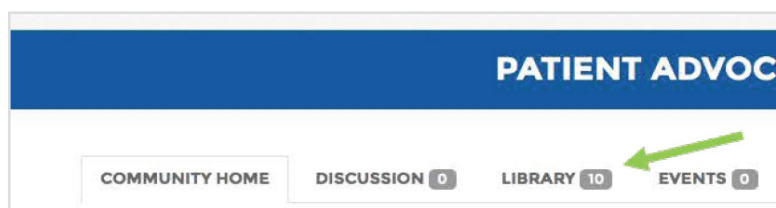
Once you have navigated to the **LIBRARY ENTRIES**, you can browse through the files, download files and create new library entries to upload files. To download a file, click on the **DOWNLOAD** button, and your file will download to your computer's download folder.
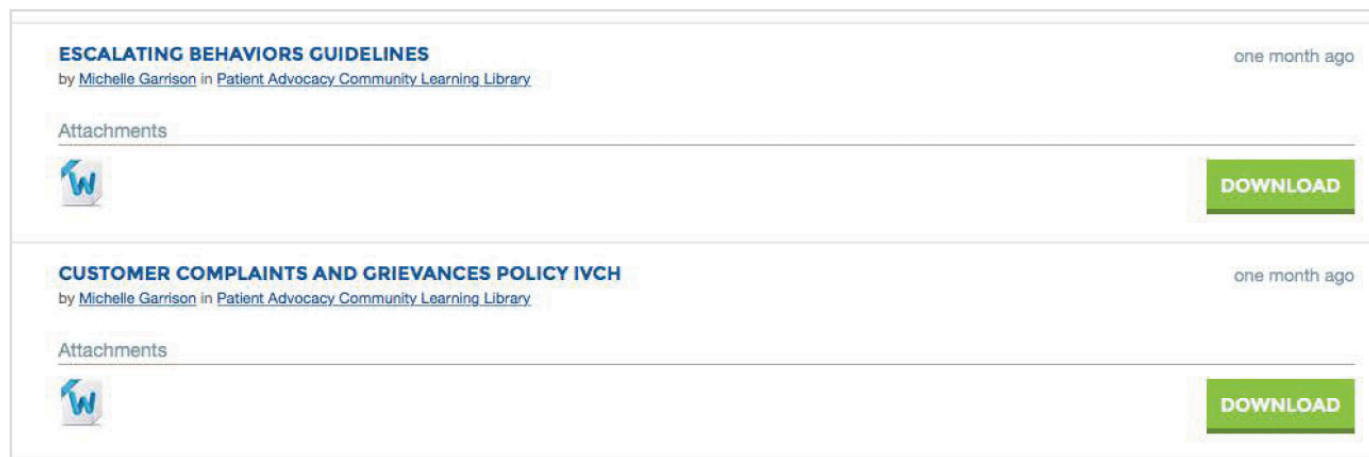
UPLOADING LIBRARY ENTRIES

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**

PX CONNECT GUIDE

a minute ago
Be the first person to recommend this.

In Moderation by Kayleigh Bentley

Please see attached.

Attachments

DOWNLOAD

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: 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.