DateSpanner — Comprehensive Assessment Storyboard (Articulate Rise)

Version: DRAFT

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1) Assessment Overview

Purpose: Validate that learners can perform the high-level workflow presented in the demo: access latest DateSpanner, use the INDEX to find the right tab, verify core ERP fields, apply eligibility concepts, and make correct documentation choices.

Placement: Immediately after the demo video (Part 1) in the Rise course.

Assessment Model: Question banks with random draw; item-level feedback; remediation links back to demo timestamps (to be added when video is finalized).

2) Scoring & Attempts

• Passing score: 80%

• Attempts: 2 total

• Show feedback: On, question-level (Correct/Incorrect with "why")

• Show correct answers after submit: Off (recommended)

3) Question Bank Structure & Draw Logic

Total items authored: 24; items drawn per attempt: 16 (randomized order).

Bank A — Access & Version Control (3 items) → Draw 2

Bank B — INDEX Navigation (5 items) → Draw 3

Bank C — ERP Fundamentals (6 items) → Draw 4

Bank D — Eligibility Concepts (4 items) → Draw 3

Bank E — A-vs-K & Documentation Concepts (6 items) → Draw 4

4) Authoring Notes for Rise

• Create 5 question banks (A–E). Add items below to each bank; then create a Quiz lesson that draws items per the logic above.

• Hotspot and matching items reference redacted ERP screenshots; replace placeholders with scrubbed images before publishing.

• For each item, include targeted feedback plus a "Learn more" link to the relevant demo timestamp.

A1. Access_Location — MCQ
Where do you download the latest DateSpanner?

Choices:

- Email link from a teammate

- Toolbox → Product Knowledge → Therapy List → Diabetes View → Resources

- Directly from ERP

- From an old local copy

Correct Answer: Toolbox → Product Knowledge → Therapy List → Diabetes View → Resources

Feedback — Correct: Correct — always pull the newest file from the Diabetes View > Resources area.

Feedback — Incorrect: Remember: DateSpanner is a living document. Avoid local or outdated copies.

Asset/Media: No image required.

A2. Open_Index_First — MCQ
After opening the workbook, which tab should you use first?

Choices:

- CGM Supplies

- INDEX

- Status Codes

- HCPCS Codes

Correct Answer: INDEX

Feedback — Correct: Yes — the INDEX is your table of contents and entry point.

Feedback — Incorrect: Start at the INDEX to pick the correct tab for the caller's need.

Asset/Media: Screenshot of INDEX tab (optional).

A3. Version_Control — Process Order
Arrange the steps for version control in the correct order.

Choices:

- Open Toolbox path

- Download the newest workbook

- Open INDEX tab

- Verify workbook date/version in file header

Correct Answer: 1) Open Toolbox path → 2) Download newest workbook → 3) Verify date/version → 4) Open INDEX tab

Feedback — Correct: Good — this ensures you always work from the current source of truth.

Feedback — Incorrect: Check the file header and INDEX banner for last-updated date before use.

Asset/Media: Use "Sorting" or "Process" question type in Rise.

B1. Index_Pump — Scenario
A caller needs pump supplies. From the INDEX, which tab should you open?

Choices:

- CGM Supplies

- Pump Supplies

- Contacts/Transfers

- Warranty

Correct Answer: Pump Supplies

Feedback — Correct: Correct — INDEX → Pump Supplies is the fastest route.

Feedback — Incorrect: Use the INDEX to route to the correct tab. Avoid guessing.

Asset/Media: Screenshot of INDEX with Pump Supplies highlighted.

B2. Index_Contacts — MCQ
You need a manufacturer's phone number. Which INDEX category will you choose?

Choices:

- Status Codes

- Contacts/Transfers

- Shipping

- Templates

Correct Answer: Contacts/Transfers

Feedback — Correct: Exactly — the directory is centralized under Contacts/Transfers.

Feedback — Incorrect: The INDEX is designed to avoid hunting across multiple sources.

Asset/Media: Screenshot of INDEX with Contacts highlighted.

B3. Index_Status — MCQ

Which INDEX category helps you determine the correct status concept to document a date correction?

Choices:

- CGM Supplies

- Status/Shipping Codes

- Warranty

- HCPCS

Correct Answer: Status/Shipping Codes

Feedback — Correct: Yes — status guidance is consolidated there at a conceptual level.

Feedback — Incorrect: We do not teach specific codes here, only the concept and location.

Asset/Media: Screenshot of INDEX with Status/Shipping highlighted.

B4. Index_CGM — Scenario

A customer asks about CGM sensor replacement timing. Where should you navigate from INDEX?

Choices:

- CGM Supplies

- Pump Supplies

- Eligibility Rules

- Contacts

Correct Answer: CGM Supplies

Feedback — Correct: Correct — the CGM Supplies area links to the brand tabs you need.

Feedback — Incorrect: The INDEX points to the CGM section; details come later modules.

Asset/Media: INDEX screenshot; optional brand sublinks mocked.

Which INDEX section points you to where eligibility rules are summarized?

Choices:

- Eligibility / Date Spans
- Contacts
- Warranty
- Templates

Correct Answer: Eligibility / Date Spans

Feedback — Correct: Right — use this to orient to inputs that drive eligibility.

Feedback — Incorrect: Remember: this assessment stays at concept level; specifics come later.

Asset/Media: INDEX screenshot with Eligibility highlighted.

Click the insurance field that must be verified before using DateSpanner.

Correct Answer: Insurance field (hotspot region)

Feedback — Correct: Good — insurance selection determines the path you take from the INDEX.

Feedback — Incorrect: Confirm payer type before you navigate to content.

Asset/Media: Redacted ERP screenshot with hotspot area.

Match the ERP field to what you must confirm.

Choices:

- Customer Type → (appropriate value)
- Bill To → (correct billing entity)

Correct Answer: Customer Type → appropriate value; Bill To → correct entity

Feedback — Correct: Correct — these drive how you interpret content you'll open from INDEX.

Feedback — Incorrect: Eligibility lookup depends on confirming these fields first.

Asset/Media: Redacted ERP screenshot for context (optional).

C3. ERP_Product_Category — MCQ
Based on the prior order snippet, which category fits this reorder?

Choices:

- CGM Supplies

- Pump Supplies

- Testing Supplies

- Other

Correct Answer: CGM Supplies (or Pump/Testing — set per asset)

Feedback — Correct: Nice — identify the category before jumping into the INDEX.

Feedback — Incorrect: Scan order history cues to choose the right route.

Asset/Media: Crop of ERP prior order list (redacted).

C4. ERP_MD — MCQ
Which MD is associated with the account?

Choices:

- Dr. A

- Dr. B

- Dr. C

- Not listed

Correct Answer: Correct MD per asset

Feedback — Correct: Correct — MD info should be verified early.

Feedback — Incorrect: MD ties into documentation and escalation paths.

Asset/Media: Redacted ERP header with MD field.

C5. ERP_Balance — True/False
There is an outstanding balance that would prevent shipment.

Choices:

- True

- False

Correct Answer: True (or False — set per asset)

Feedback — Correct: Right — balance affects fulfillment decisions.

Feedback — Incorrect: Always check balance before proceeding.

Asset/Media: ERP balance pane crop (redacted).

C6. ERP_Mobile — Yes/No
Is there a mobile phone on file?

Choices:

- Yes

- No

Correct Answer: Yes (or No — set per asset)

Feedback — Correct: Correct — this supports notifications and follow-up.

Feedback — Incorrect: Collect updated contact info if missing.

Asset/Media: ERP contact section (redacted).

D1. Elig_Inputs — MCQ
Which inputs primarily drive eligibility at a concept level?

Choices:

- Today's date & call length

- Last ship date & days' supply

- Warehouse inventory & agent shift

- Customer preference & time zone

Correct Answer: Last ship date & days' supply

Feedback — Correct: Exactly — those inputs drive the next eligible date.

Feedback — Incorrect: Use the INDEX to get to the eligibility area; do not rely on guesswork.

Asset/Media: No image required.

D2. Elig_TodayVsEligible — MCQ
If today is before the eligible date, what should the agent do conceptually?

Choices:

- Use today's date to generate the order

- Use the eligible date for the order

- Cancel the order permanently

- Ship now and fix later

Correct Answer: Use the eligible date for the order

Feedback — Correct: Yes — future-date to the correct eligible date.

Feedback — Incorrect: Using today's date can cause denials or status issues.

Asset/Media: No image.

D3. Elig_Sorting — Sorting
Drag each item into the correct list: Affects Eligibility vs Does Not Affect Eligibility.

Choices:

- Last ship date

- Days' supply

- Payer line from INDEX

- Agent lunch break

- Customer mood

Correct Answer: Affects: Last ship date; Days' supply; Payer line. Does Not Affect: Lunch break; Mood

Feedback — Correct: Right — keep the focus on factual inputs.

Feedback — Incorrect: If unsure, return to the INDEX to find the correct tab.

Asset/Media: Use Rise Sorting interaction.

D4. Elig_Concept_Scenario — Scenario
You shipped a 90-day supply on Oct 30. What is the next step conceptually?

Choices:

- Check last ship date + days' supply in eligibility area and use the correct eligible date

- Use today's date since the patient is calling now

- Ask the warehouse to override

- Transfer to another team immediately

Correct Answer: Check last ship date + days' supply... and use the correct eligible date

Feedback — Correct: Correct — concept first. Exact dates are covered in advanced training.

Feedback — Incorrect: Avoid using today's date unless it matches the eligible date.

Asset/Media: No image.

E1. AK_Concept — Either/Or

At a high level, which HCPCS code family is commonly associated with Medicare CGM contexts?

Choices:

- A-codes

- K-codes

Correct Answer: K-codes

Feedback — Correct: Right — conceptually correct at this level; details come later with SME.

Feedback — Incorrect: Use INDEX → HCPCS tab for specifics in the advanced module.

Asset/Media: No image.

E2. AK_Commercial — Either/Or

At a concept level for many commercial CGM contexts, which HCPCS family is commonly referenced?

Choices:

- A-codes

- K-codes

Correct Answer: A-codes

Feedback — Correct: Correct — high-level guidance only; confirm specifics later.

Feedback — Incorrect: When in doubt, route via INDEX → HCPCS.

Asset/Media: No image.

E3. Doc_Status_Date — MCQ
Your order is flagged because the date is more than 10 days in the future. Which status concept fits best?

Choices:

- Quantity issue

- Future-dated / date correction

- Shipping exception

- Customer preference

Correct Answer: Future-dated / date correction

Feedback — Correct: Yes — this reflects a date correction scenario.

Feedback — Incorrect: Quantity issues are addressed separately.

Asset/Media: No image.

E4. Doc_Status_Qty — MCQ
The order exceeds the permitted quantity for the supply cycle. Which status concept is most appropriate?

Choices:

- Quantity issue

- Future-dated / date correction

- Shipping exception

- Customer preference

Correct Answer: Quantity issue

Feedback — Correct: Correct — quantity exceeds the allowed threshold.

Feedback — Incorrect: Future-dated scenarios involve dates, not quantities.

Asset/Media: No image.

E5. Doc_WhenToEscalate — MCQ
When should you escalate or seek SME guidance?

Choices:

- When INDEX clearly shows the path

- When the tool contradicts itself or the ERP

- When you already know the answer from memory

- When the caller is impatient

Correct Answer: When the tool contradicts itself or the ERP

Feedback — Correct: Correct — contradictions or gaps merit escalation.

Feedback — Incorrect: Impatience is not a reason to bypass documented process.

Asset/Media: No image.

E6. Doc_Pathway — Scenario
Which is the best documentation pathway for this training level?

Choices:

- Memorize specific codes and paste them

- Use INDEX to navigate to the correct tab, then document based on the concept shown in demo

- Skip documentation in favor of speed

- Ask a peer for whatever code they used last time

Correct Answer: Use INDEX → correct tab → document based on demo concepts

Feedback — Correct: Exactly — follow the path taught in the video; details come with SMEs later.

Feedback — Incorrect: Peer memory is not a controlled source of truth.

Asset/Media: No image.

5) Publishing & Reporting
- Publish as SCORM 2004 (recommended) or xAPI to capture item-level data.

- In the LMS, enable completion on quiz pass (80%). Consider remediation assignment for non-pass attempts.

6) Open Items / Placeholders
- Replace placeholder screenshots with scrubbed ERP images (insurance, customer type, bill-to, order history, MD, balance, phone).

• Add deep-dive items once SMEs confirm payer nuances, catalogue codes, kit rules, and status specifics.