

## **Glossary of Terms: Participant Tracking Tools and Platforms for Produce Prescription Programs**

*This glossary defines the key terms used in the Participant Tracking Tools and Platforms comparison guide. The purpose of this guide is to help produce prescription (PPR) implementers select the right platform for participant tracking, enrollment and reporting.*

### **Platform Type**

**Case management platform:** A software system designed to track individual participants and the services they receive over time. These platforms typically support enrollment, service delivery, and surveys.

**Cloud-Based Work Management Platform:** A collaborative, browser-based tool designed for project and task management. These platforms can support lightweight tracking and reporting but are generally not built for participant-level data management.

**Customer Relationship Management Platform:** Software originally built to manage relationships with customers or clients, which can be adapted for managing program participants, partner organizations, and donors. CRMs often require significant customization to meet PPR program needs.

**Survey Platform:** A tool designed primarily for collecting structured data through questionnaires. Survey platforms can be used for intake and enrollment but are not purpose-built for ongoing case management or longitudinal tracking without additional configuration.

**Spreadsheet:** A tool used to organize, store, and analyze data manually. Spreadsheets like Excel or Google Sheets offer flexibility but require significant manual effort and provide limited automation or participant tracking functionality.

### **Solution Tech Level**

*An assessment of the technical complexity involved in setting up and maintaining the tool. Levels are categorized as follows:*

- **Low:** Minimal technical knowledge required; easy to configure without IT support.
- **Low-Medium:** Some familiarity with software and data management is helpful.
- **Medium:** Moderate technical skills needed; may require staff training or vendor support.
- **High:** Significant technical expertise or dedicated IT/consultant support typically required.

### **Other Categories:**

**Participant Enrollment Tracking:** The ability of a platform to record and manage the process of enrolling individuals into a program, including capturing intake/enrollment information, eligibility criteria, and consent.

**Participant Engagement Tracking:** The ability to record and monitor a participant's ongoing engagement in a program, including session attendance, benefit redemption and use of services.

**Reporting / Dashboards:** Built-in tools that allow users to generate summaries, visual charts, and performance metrics from program data.

**Partner Interface:** A feature or module that allows external partner organizations (e.g., referral agencies, healthcare or other partners) to access the platform, input data, or view relevant records, typically with role-based permissions controlling what each partner can see or edit.

**Ability to Track Participation Over Time:** The capacity to link a single participant's records across multiple sessions, visits, or time periods. This can enable analysis over time and long-term trend monitoring rather than only point-in-time snapshots.

**Ease of Set-Up:** A measure of how quickly and easily a program can get the platform operational. Factors include whether implementation requires vendor support, custom configuration, or specialized technical skills.

**HIPAA Compliance:** Adherence to the Health Insurance Portability and Accountability Act (HIPAA), which sets standards for protecting sensitive participant health information. Programs handling health data must ensure their platform is HIPAA-compliant. Note: many platforms require a Business Associate Agreement (BAA).

**Cost Structure:** How a platform charges for its use. Common models include:

- **Per-user fee:** Charged based on the number of staff accounts.
- **Per member per month (PMPM):** Charged based on the number of enrolled and/or active participants.
- **Licensed software:** A flat fee for access, often tied to an organization or enterprise.
- **One-time implementation fee:** An upfront cost for initial setup and configuration.
- **Custom development fees:** Additional charges for building custom features or integrations.

### **Technical Terms**

**BAA (Business Associate Agreement):** A legally required contract between a healthcare-covered entity (such as a health system or insurer) and a vendor that handles protected health information (PHI) on their behalf.

**API Integration:** A technical connection between two software systems that allows them to automatically share or sync data. API integrations reduce manual data entry and enable platforms to communicate with electronic health records (EHRs), billing systems, or other tools.

**Role-Based Access:** A security feature that controls what data or functions each user can view or edit based on their role (e.g., program staff vs. partner organization vs. administrator). Helps protect participant privacy while enabling collaboration.

**Longitudinal Tracking:** The ability to follow a single participant over an extended period of time, linking their records across multiple interactions, visits, or data collection points to understand trends and outcomes.

**Data Migration:** The process of transferring existing participant or program data from one system into a new platform, typically performed during implementation. May incur additional fees depending on the vendor.

**Kiosk Mode:** A software setting that allows participants to self-enter their information directly into a device (such as a tablet) at a program site, reducing staff data entry burden and enabling real-time intake.

**Barcode Scanning:** The use of unique barcodes assigned to individual participants to enable fast, accurate check-in or attendance tracking at program visits or food distributions.

**Omnichannel Communication:** The ability to reach participants through multiple communication channels, such as email, SMS/text, phone, and in-app messaging, from within a single platform.

**Version Control:** The practice of tracking and managing changes to data or documents over time. Lack of version control (common in spreadsheets) can result in conflicting copies or lost data when multiple users are editing simultaneously.