USER REFERENCE GUIDE

CLINICIANS & DATA ENTRY

VERSION 7.5

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Signing into Immuware™

Navigate to your organization's Immuware™ home page on your computer, tablet, or mobile device to sign in [Figure 1].

Self-Registration

If you do not have an Immuware™ account and your organization allows you to self-register, click on the **Self Register** (1) link to visit the Create an Account page [Figure 2].

Create an Account

Complete all of the required fields (denoted by a red asterisk) with your information. When you have completed the required fields, click the **Create** button (2) at the bottom of the page.

Confirming Your Account

After you click the "Create" button, an email will be sent to the email address that you entered. Click the link in the email to confirm your Immuware™ account [Figure 3] and click the blue **Return to Login** button (3) to return to the login page.

Logging In

When you return to the login page [Figure 1], enter your username (your email address) and the password that you created and then click the blue **Login** button (4).

Forgotten Password

If you forget your password, you can reset it from the Immuware™ login page [Figure 1]. See "Changing Your Password" on page 5 for more information.

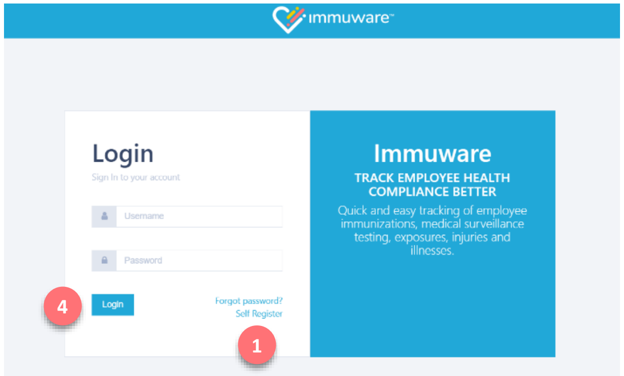

Figure 1

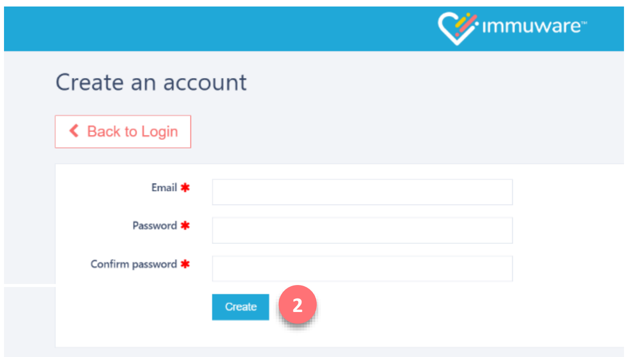

Figure 2

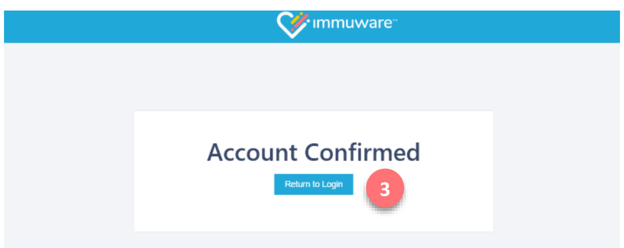

Figure 3

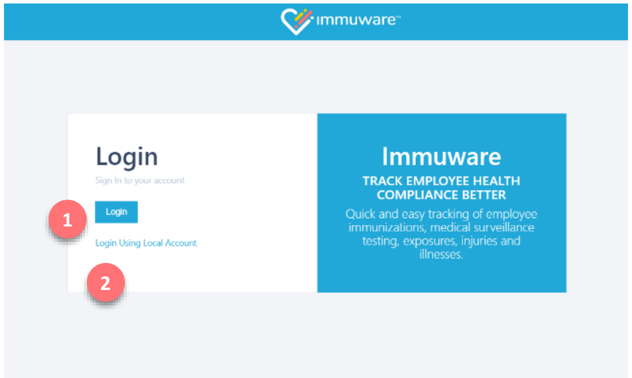

Figure 4

Signing into Immuware™ (continued)

Single Sign-On (SSO)

If your organization is using single sign-on (SSO) authentication to access Immuware™ your login page will look slightly different [Figure 4].

Entering Your Username and Password

Click on the blue **Login** button (1) to visit your organization's login page. Enter your organization username and password and you will be signed into Immuware™.

Login Using Local Account

If you do not have an organization username and password (ex. Contractor) and have been provided with a local account, click on **Login Using Local Account** (2) to display the username and password fields.

Forgotten Password

If your organization uses single sign-on (SSO) and you forget your password or need to change it, you must use your organization's forgot password or change password process. You cannot change your organization SSO password within Immuware™.

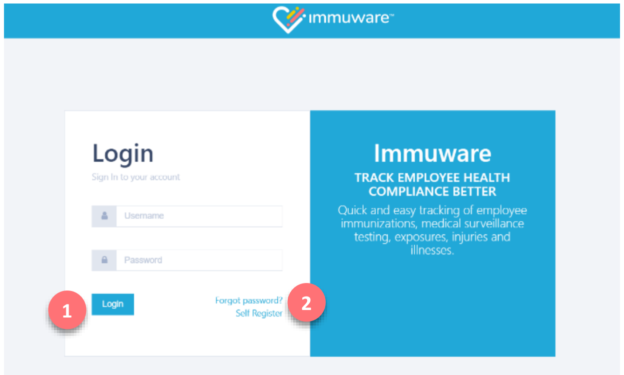

Figure 5

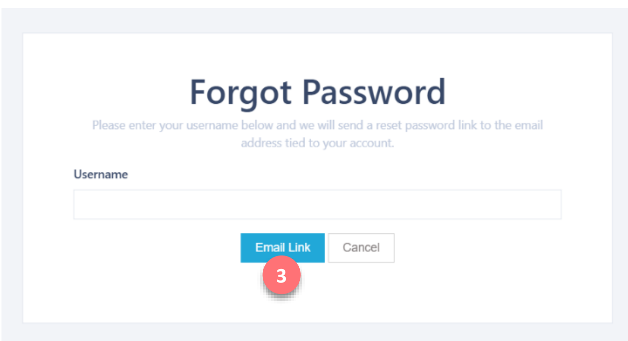

Figure 6

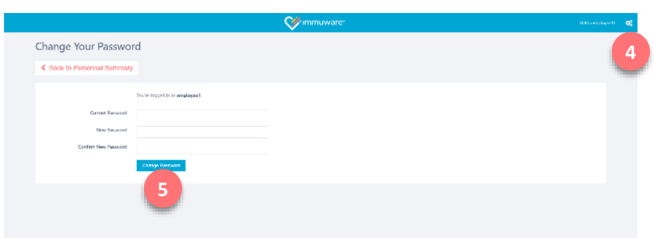

Figure 7

Signing into Immuware™ (continued)

Standard Authentication

If your organization is not using single sign-on (SSO) and you have already created a password for Immuware™, you will input your Immuware™ username and password on the login page [Figure 5].

- Enter your username and password.
1. Click the **Login** button.

Forgot Password

If you forget your password, you can reset it from the Immuware™ login page [Figure 1].

2. Click the **Forgot Password** link.
- On the Forgot Password page [Figure 6], enter your Immuware™ username.
3. Click the **Email Link** button.
- You will receive an email with instructions for resetting your password.
- If you continue to experience login issues, contact your organization's point of contact.

Changing Your Password

If you know your current password and would like to change it, you can change it from your Immuware™ user tools [Figure 7].

- Log into your Immuware™ account using the steps shown above.
4. Click on the **Gears icon** in the upper right corner of your screen to access your user tools.
- Select **Change Your Password** near the bottom of the dropdown menu.
- Enter your current password and your new password.
5. Click the **Change Password** button to complete the password change.

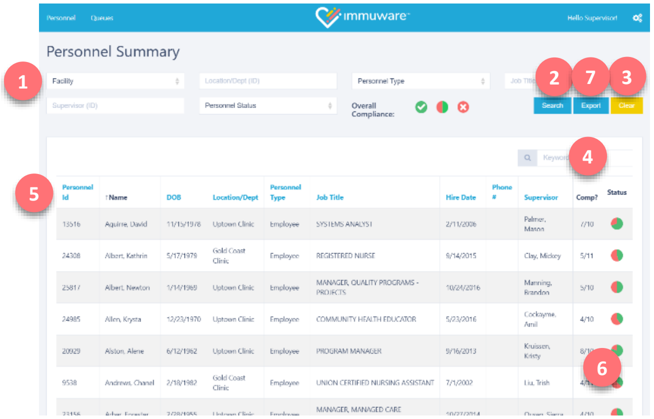

Figure 8

Personnel

Personnel Summary Page

After logging in with your clinician or data entry credentials, you will see the Personnel Summary page [Figure 8]. The Personnel Summary page lists all personnel (employee, students, volunteers, etc.) for whom your organization is tracking record compliance.

The Personnel Summary page offers a number of filters (1) that you can use to filter the results in the personnel table below. Enter partial search terms or select an option from the autocomplete list, when available.

By default, personnel on leave of absence (LOA) and terminated personnel are hidden from the Personnel Summary page. When you use the personnel status filter to include those personnel, LOA personnel will be highlighted in gold and terminated personnel will be highlighted in red.

Once a filter has been selected, click the **Search** button (2) to filter the results by the criteria you've defined or click the **Clear** button (3) to reset the filters to their default settings.

Use the **Keyword** box (4) to search for personnel by name or by their employee ID.

In the personnel table, you can see information about each person including their name, employee ID, and date of birth. Click any of the blue column headers (5) to sort the personnel table by that column.

The far right columns (6) indicate the ratio of Compliant records to Not Compliant records that each person is required to submit. This information is represented numerically and graphically as a pie chart, where green wedges represent Compliant records and red wedges represent Not Compliant records. Any preferred or not required records are not shown in either of these numerical or graphical summaries (ex. Influenza vaccination is required for some staff and preferred or not required for others, depending on their specific role in the organization).

Use the **Export** button (7) to export the data in the personnel table at the bottom of the page as an .XLSX document that you can open in Microsoft Excel. This report is dependent on the selections you have made in the filters.

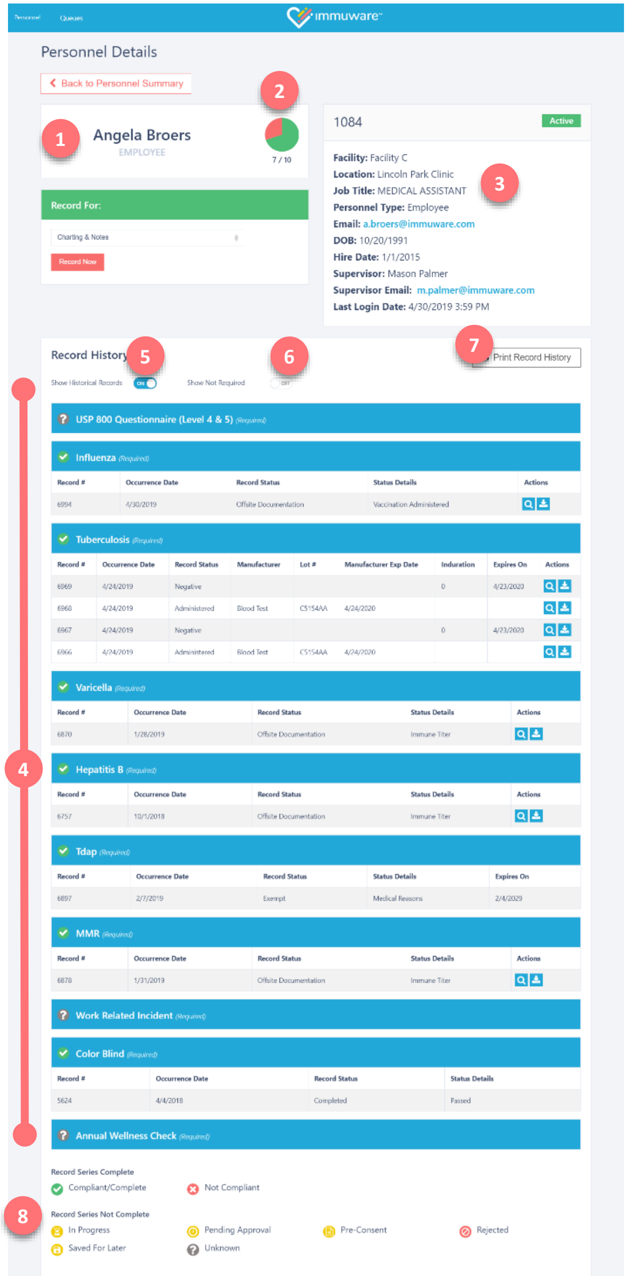

Figure 9

Personnel (continued)

Personnel Details Page

On the Personnel Summary page [Figure 8], click a name in the personnel table to open their Personnel Details page [Figure 9].

The Personnel Details page shows a variety of information including:

1. The person's name and personnel type.
2. Their ratio of Compliant records to Not Compliant records that they are required to complete. This information is represented numerically and graphically as a pie chart, where green wedges represent Compliant records and red wedges represent Not Compliant records. Any preferred or not required records are not shown in either of these numerical or graphical summaries.
3. Basic information about the employee as provided by the optional personnel system integration or personnel import file.
4. The Record History section shows an overview of all records submitted and is grouped by record type. Click on any record to open the Record Details page to see more information.
5. Use the **Show Historical Records** toggle to show or hide expired records. Setting the toggle to the "on" position shows all records, including those that have expired.
6. Use the **Show Not Required** toggle to show or hide records that this person is not required to complete.
7. The **Print Record History** button prepares a printer-friendly version of the personnel details page including their record history. The printout will reflect the selections for the Show Historical Records and Show Not Required toggles.
8. The record status icon key explains the icons shown beside each record type. See the following page for more information about each icon.

Personnel (continued)

Understanding the Icons in Immuware™

The following icons are used to graphically represent record series statuses in Immuware™:

Icon	Status	Description
	Compliant/Complete	This record meets the organization’s compliance criteria for the current season.
	Not Compliant	This record has expired and/or does not meet the organization’s compliance criteria for the current season.
	In Progress	This record series is in progress and additional steps are required to achieve compliance.
	Pending Approval	This record is waiting for review and approval by an authorized Approver.
	Pre-Consent	The consent questionnaire has been completed but the vaccination/test/certification has not been completed.
	Rejected	An authorized Approver has reviewed this record and has rejected it. Open the record to see why the record was rejected.
	Saved for Later	This record is part of an incomplete record and has been saved for additional review.
	Unknown	You have not made any progress with this record for the current season.

Figure 10

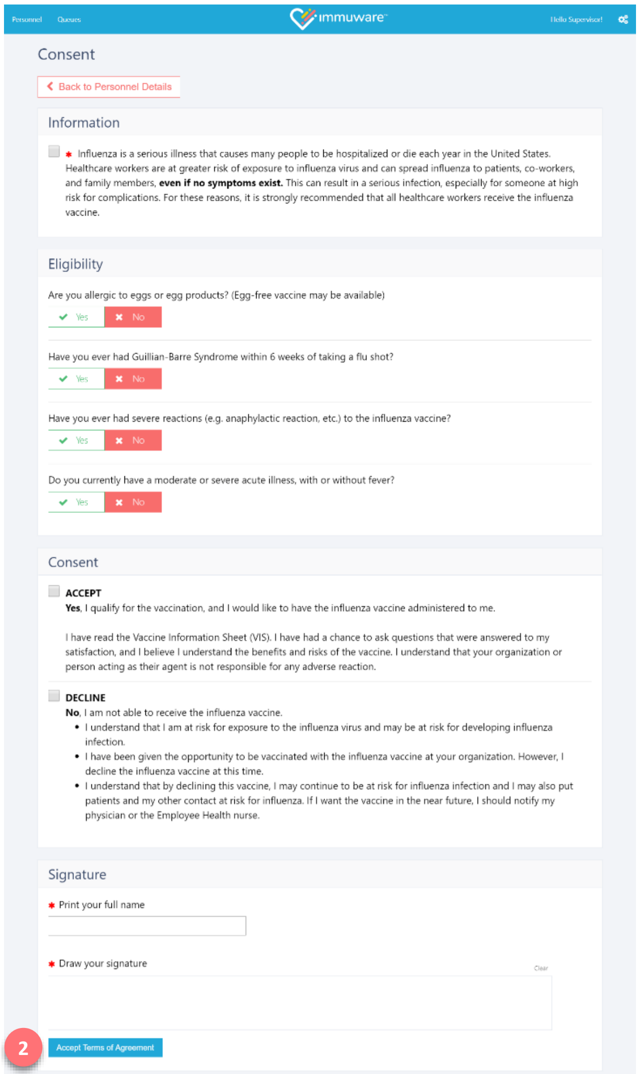

Figure 11

Record Creation

Initiate Record Creation

To document activity for a record type, go to the Personnel Details page [Figure 10].

- In the Record For section (1) choose the record from the dropdown list.
- Click the **Record Now** button.

Capture Consent

The Consent page [Figure 11] is the first page shown. Your Consent page has been customized to your organization's requirements and may vary from the image shown at left.

The person receiving the vaccination or test should:

- Complete all required fields, indicated by a large red asterisk.
- Review the eligibility questions and mark their responses.
- Select the Consent checkbox.
- Type their full name in the Signature box.
- Sign their name in the Signature box.
  - On a computer, use the mouse to click and drag the cursor to sign.
  - On a tablet or touchscreen device, the person can use their finger or a stylus to draw their signature on the screen.
- Click on the **Accept Terms of Agreement** button (2) once they have completed the consent form.

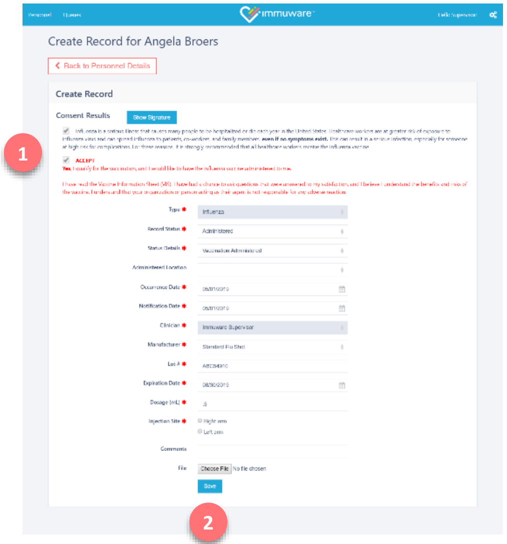

Figure 12

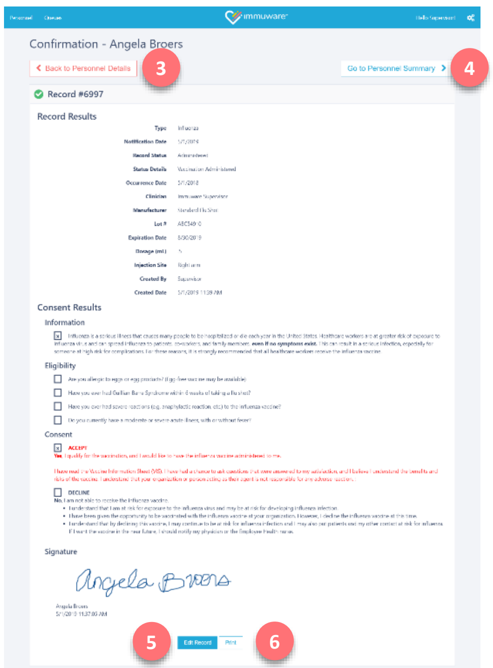

Figure 13

Record Creation (continued)

Enter Record Details

Use the Record page to capture information about the vaccination, test, or certification being administered [Figure 12].

1. The results of the personnel's consent form are shown at the top of the page.
- Enter values in all of the required fields, indicated by a large red asterisk.
2. Click the **Save** button at the bottom of the page to continue to the Confirmation page.

NOTE: Your selection in the Record Status and Status Details dropdown fields is what determines the additional fields that will be shown on the Record page.

Confirming a Record

The Confirmation page [Figure 13] provides a recap of the information entered on the Consent and Record pages. From this page, you can:

3. Use the **Back to Personnel Details** button to return to the employee's Personnel Details page and enter another record for this person.
4. Use the **Go to Personnel Summary** button to return to the Personnel Summary page and view the list of all personnel at your organization.
5. Use the **Edit Record** button if you need to make changes to the information that you just entered on the Record page.
6. Use the **Print** button to generate a printer-friendly version of the Confirmation page.

Figure 14

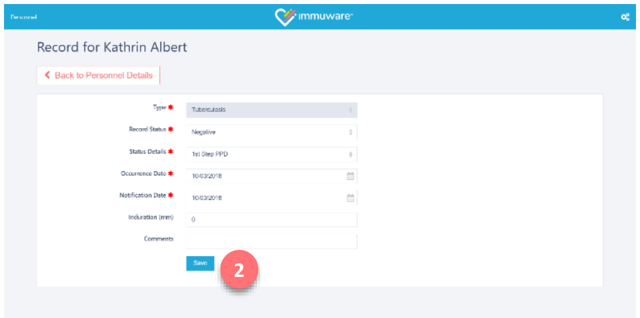

Figure 15

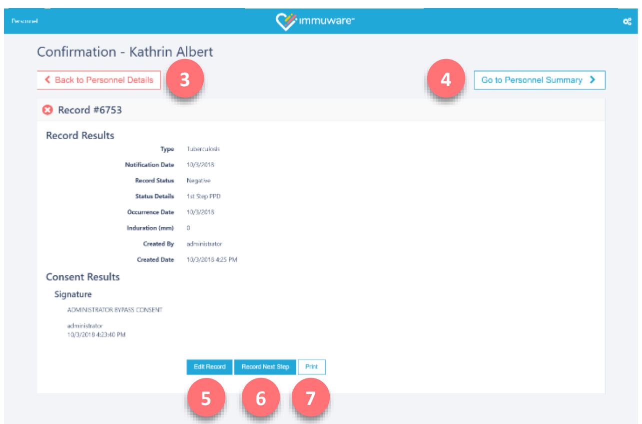

Figure 16

Record Creation (continued)

Multi-Step Record Types

Some records, such as Tuberculosis screenings, are multi-step records. To complete the next steps for these records:

1. Go to the Personnel Details page and select the record from the dropdown list [Figure 14].
- Click the **Record Next Step** button (also available on the Confirmation page).

On the Record page [Figure 15]:

2. Enter values in all of the required fields, indicated by a large red asterisk.
- Click the **Save** button at the bottom of the page to continue to the Confirmation page.

NOTE: Your selection in the Record Status and Status Details dropdown fields is what determines the additional fields that will be shown on the Record page.

Confirming a Record

The Confirmation page [Figure 16] provides a recap of the information entered on the Consent and Record pages. From this page, you can:

3. Use the **Back to Personnel Details** button to return to the Personnel Details page and enter another record for this person.
4. Use the **Go to Personnel Summary** button to return to your Personnel Summary page and view the list of all personnel at your organization.
5. Use the **Edit Record** button if you need to make changes to the information that you just entered on the Record page.
6. Use the **Record Next Step** button to record the next step for a multi-step record (also available on the Personnel Details page).
7. Use the **Print** button to generate a printer-friendly version of the Confirmation page.

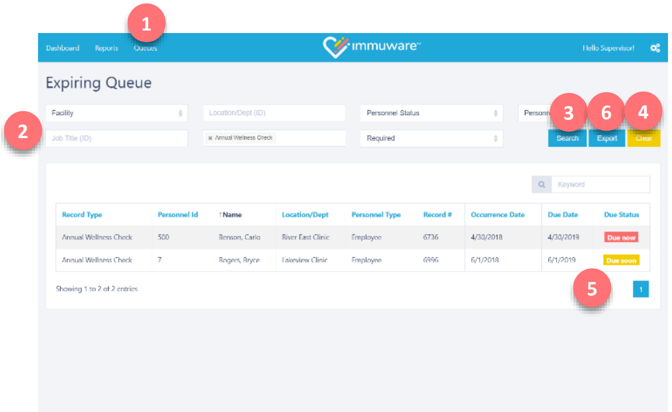

Figure 17

Queues

Expiring Queue

Clinicians and data entry have access to the Expiring Queue [Figure 17], where they can check for records that are at risk of expiring as well as records that have already expired.

To access the Expiring Queue, click on **Queues** (1) from the top left menu and select **Expiring**.

The Expiring Queue page offers a number of filters (2) that you can use to filter the results in the personnel table below. Enter partial search terms or select an option from the autocomplete list, when available. Click the **Search** button (3) to generate a report in the Expiring Queue or click the **Clear** button (4) to reset the filters to their default settings.

Your report will appear in the table below the filters. The far-right columns (5) indicate the expiration date of each record and icons indicate which records have already expired and which records are at risk of expiring:

Icon	Status	Description
Due soon	Due Soon	This record will expire soon. If the record expires, the employee may not be compliant for this record type.
Due now	Due Now	This record has expired and the employee may not be compliant for this record type any longer.

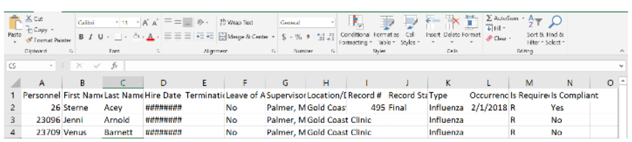

Figure 18

Exporting the Expiring Queue

On the Expiring Queue page [Figure 17], you can export the report you have generated by clicking the **Export** button (6). This will download a .XLSX file of your report that you can open in Microsoft Excel [Figure 18].

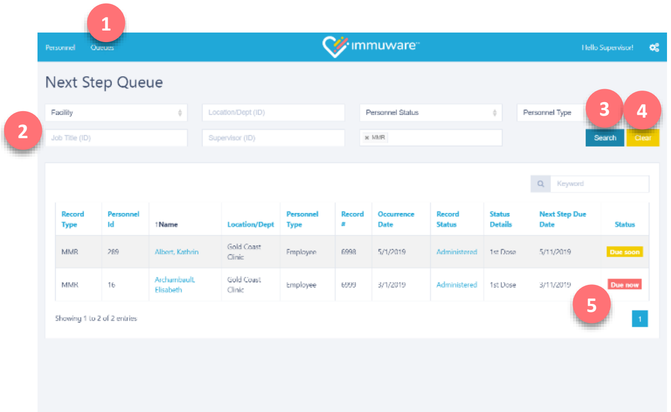

Figure 19

Queues (continued)

Next Step Queue

Clinicians and data entry have access to the Next Step Queue [Figure 19], where they can check for personnel with multi-step records that are ready for the next step or are nearly ready for the next step.

To access the Next Step Queue, click on **Queues** (1) from the top left menu and select **Next Step**.

The Next Step Queue page offers a number of filters (2) that you can use to filter the results in the personnel table below. Enter partial search terms or select an option from the autocomplete list, when available. Click the **Search** button (3) to generate a report in the Next Step Queue or click the **Clear** button (4) to reset the filters to their default settings.

Your report will appear in the table below the filters. The far-right columns (5) indicate the next step due date of each record and icons indicate which personnel are ready for the next step and which are nearly ready for the next step:

Icon	Status	Description
Due soon	Due Soon	This multi-step record will be ready for the next step soon.
Due now	Due Now	This multi-step record is ready for the next step now.

Additional Support

We are proud to partner with organizations like yours and we thank you for choosing Immuware™ to record and track your employee health compliance.

If you have additional questions that were not covered in this guide or if you experience difficulty, please contact your organization's point of contact for support.