USER REFERENCE GUIDE

SUPERVISORS

VERSION 7.5

Table of Contents

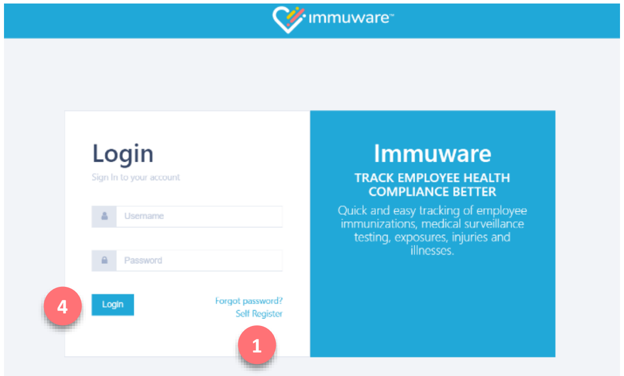

Figure 1

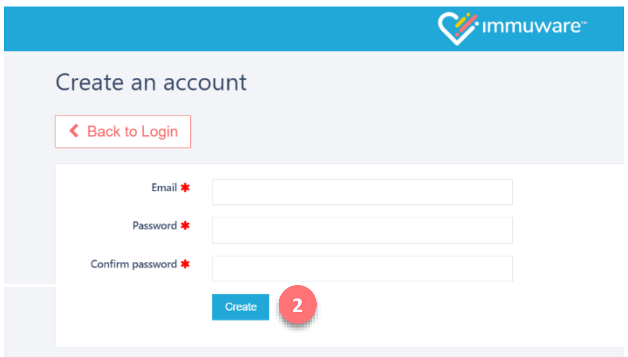

Figure 2

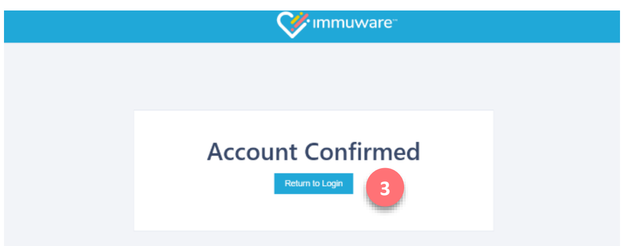

Figure 3

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 ## for more information.

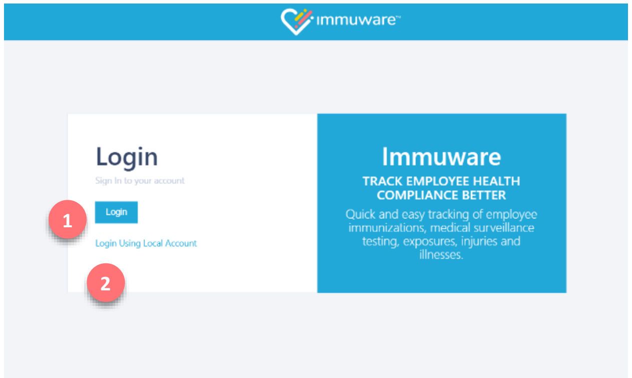

Figure 4

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™.

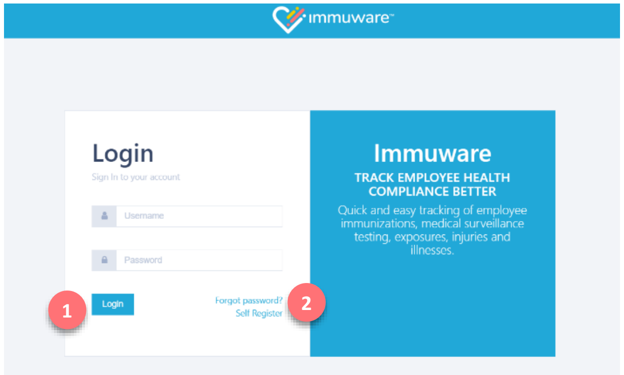

Figure 5

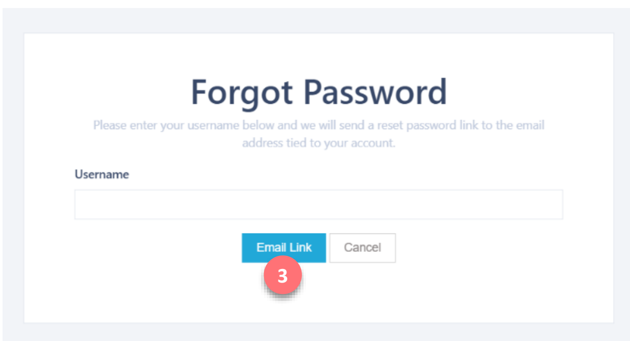

Figure 6

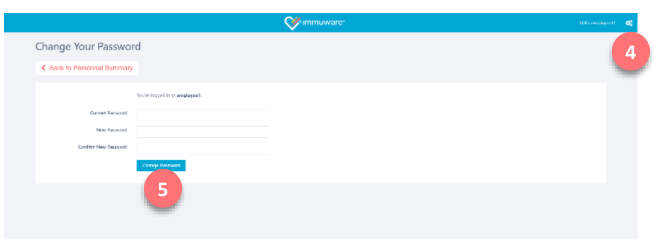

Figure 7

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.

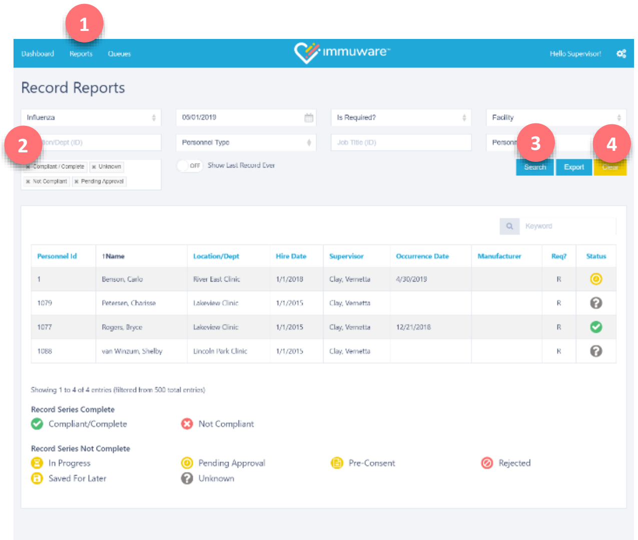

Figure 8

Reporting

Types of Reports

There are two types of reports available to supervisors: Single-select Reports and Multi-select Reports. These reports can be accessed by clicking on **Reports** (1) in the top menu from any page.

Single-select Reports

As a supervisor, when you first log into Immuware™ you will be presented with the Single-select Reporting page [Figure 8]. This page allows you to select one record type and run a report on your direct reports' compliance. Use any or all of the following filters (2) to create your report:

Filter	Description
Type	Select one record type for your report.
As of Date	Select the date for which you would like to generate a report. This field will default to today's date. *For example, to check all of your direct reports' compliance as of May 1, 2019 you would enter that date in the As of Date filter.*
Is Required?	Select whether this report should be generated for employees that are required, preferred, or not required to complete the selected record type. If left blank, your search results will include all direct reports.
Facility	Select a particular facility to generate a report for.
Location/Dept (ID)	Enter a particular location/department ID. As you start to type, options will appear below the field based on data in your system.
Personnel Type	Select a particular personnel type to generate a report for.
Job Title (ID)	Enter a particular job title/ID. As you start to type, options will appear below the field based on data in your system.
Personnel Status	Select whether you would like to include employees on a leave of absence (LOA), employees who are terminated, or both. If left blank, the report will only include active employees.
Icon Status	Select one or multiple statuses that you would like to search for. See "Understanding the Icons in Immuware™" on the following pages for more information on each of the icon statuses.

Once the filters have been selected, click the **Search** button (3) to generate results for the criteria you've defined or click the **Clear** button (4) to reset the filters to their default settings. Your search results will appear in the table below.

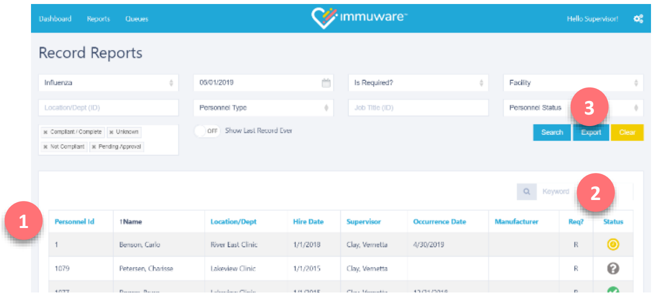

Figure 9

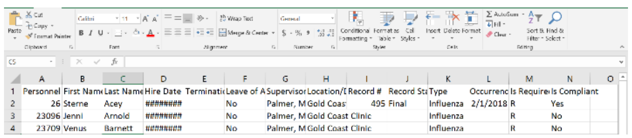

Figure 10

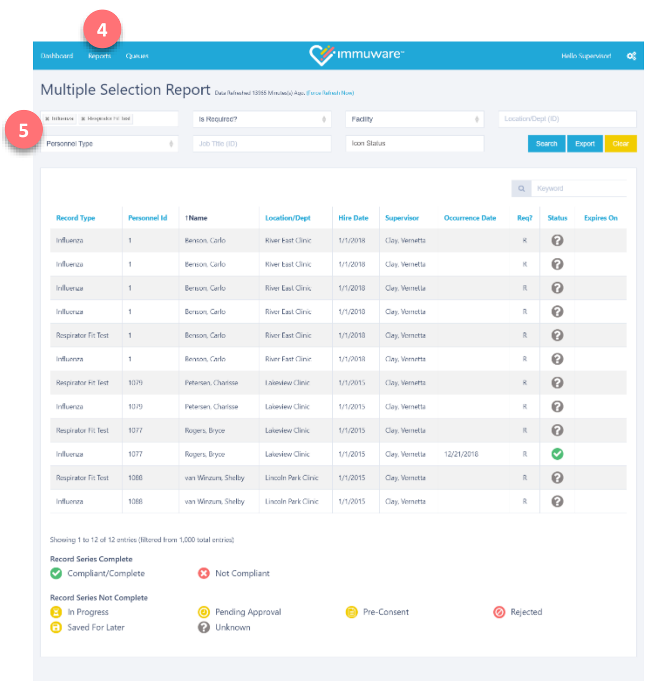

Figure 11

Reporting (continued)

Types of Reports (continued)

Single-select Reports (continued)

The table [Figure 9] will show information about each of your direct reports including their name, employee ID, and hired date. Click any of the blue column headers (1) to sort the personnel table by that column or use the Keyword search box (2) to search for a particular employee.

On the single-select report results page [Figure 9], you can export the report you have generated by clicking the **Export** button (3). This will download a .XLSX file of your report that you can open in Microsoft Excel [Figure 10].

Multi-select Reports

To access the Multi-select Report page [Figure 11], click on **Reports** (4) in the top menu from any page and select **Records (Multi-select)**. This page allows you to select multiple record types and run a report on your direct reports' compliance. Use any or all of the following filters (5) to create your report:

Filter	Description
Type	Select one or multiple record type(s) for your report. By default, all record types will be selected. Remove the record types you want to exclude from your multi-select report by clicking the respective "X."
Is Required?	Select whether this report should be generated for employees that are required, preferred, or not required to complete the selected record type. If left blank, your search results will include all direct reports.
Facility	Select a particular facility to generate a report for.
Location/Dept (ID)	Enter a particular location/department ID. As you start to type, options will appear below the field based on data in your system.
Personnel Type	Select a particular personnel type to generate a report for.
Job Title (ID)	Enter a particular job title/ID. As you start to type, options will appear below the field based on data in your system.
Icon Status	Select one or multiple statuses that you would like to search for. See "Understanding the Icons in Immuware™" on the following pages for more information on each of the icon statuses.

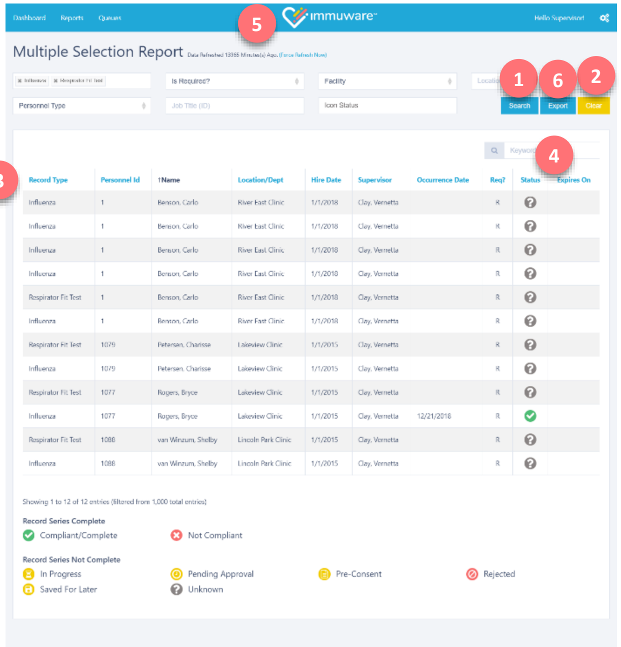

Figure 12

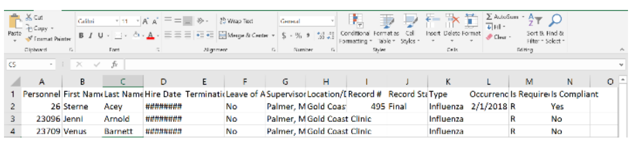

Figure 13

Reporting (continued)

Types of Reports (continued)

Multi-select Reports (continued)

Once the filters have been selected, click the **Search** button (1) to generate results for the criteria you've defined or click the **Clear** button (2) to reset the filters to their default settings. Your search results will appear in the table below [Figure 12].

The table will show information about each of your direct reports including their name, employee ID, and hired date. Click any of the blue column headers (3) to sort the personnel table by that column or use the Keyword search box (4) to search for a particular employee.

NOTE: Due to the amount of data processed to create multi-select reports, data is refreshed periodically rather than constantly. A message at the top of the page (5) indicates how recently the data was refreshed. Click **Force Refresh Now** to begin a data refresh and then click the **Search** button again in a few moments (1) to refresh your search results.

On the multi-select report results page [Figure 12], 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 13].

Reporting (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.

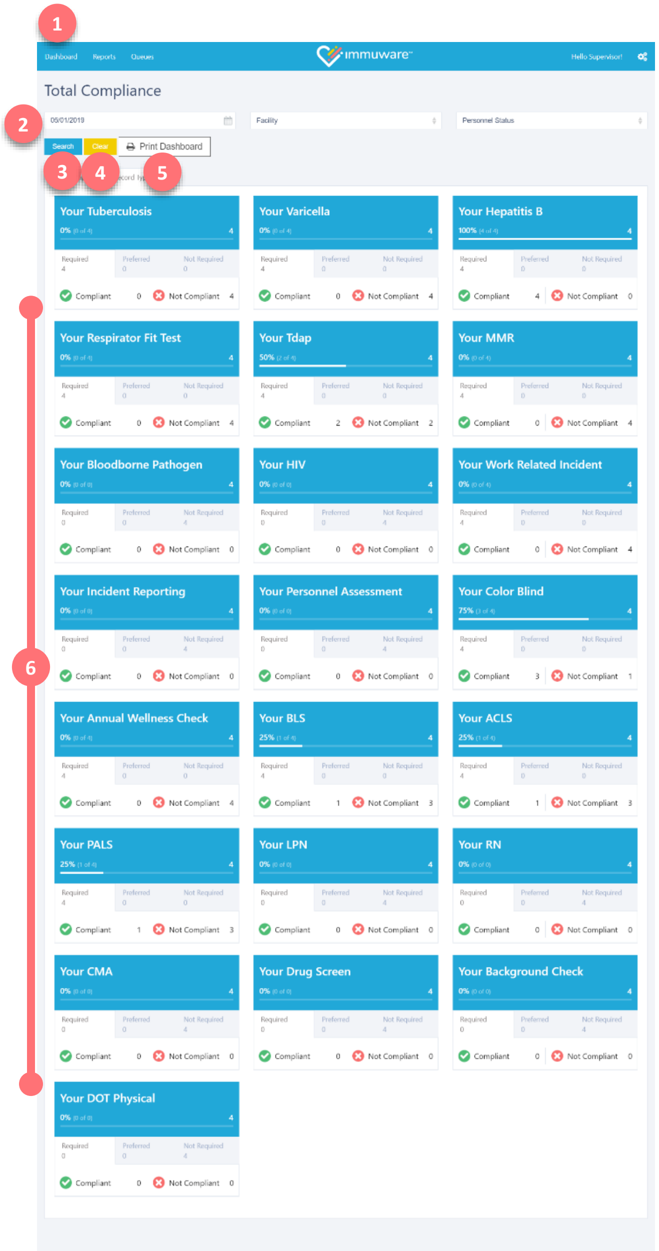

Figure 14

Dashboards

Supervisor Dashboards

Dashboards provide a high-level overview of your direct reports' compliance, for all record types or for a given record type. Compliance can also be shown by facility, location/department, etc.

To view your dashboard options, click the **Dashboard** option from the top left menu (1).

Total Compliance Dashboard

The Total Compliance Dashboard [Figure 14] shows overall compliance for all record types.

- 2 Filters at the top of the page allow you change the reporting date, the facility that is being reported on, and the status of your direct reports that are shown in the figures. Click the **Search** button (3) to filter the results by the criteria you've defined or click the **Clear** button (4) to reset the filters to their default settings.
- Use the **Print Dashboard** button (5) to prepare a printer-friendly version of the dashboard presented on your screen.
- 6 The dashboard tiles provide an overview of compliance for each record type that your organization is monitoring. The horizontal white line shows overall compliance and figures below the line denote:
    - The number of personnel who are required to complete each record type.
    - The number of personnel who are not required or are preferred to complete each record type.
    - Clicking on the tabs for "Required," "Preferred," and "Not Required" will present the number of personnel who are Compliant and Not Compliant for each record type based on your selection. By default, the compliance figures are shown for "Required" personnel.
- On each dashboard tile, you can click on the compliance requirement or the compliance status to generate a report of those direct reports.

NOTE: If you would like to edit or remove a dashboard or you would like to create a new dashboard, please contact your organization's point of contact.

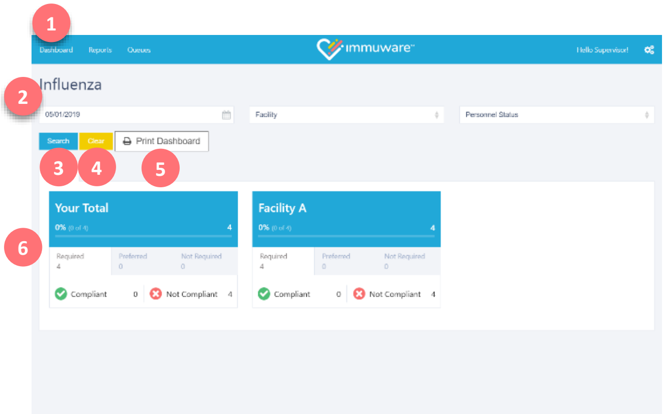

Figure 15

Dashboards (continued)

Individual Record Dashboards

Individual dashboards [Figure 15] are available for each record type and show overall compliance for the specified record type. To view your dashboard options, click the **Dashboard** option from the top left menu (1).

2 Filters at the top of the page allow you change the reporting date, the facility that is being reported on, and the status of your direct reports that are shown in the figures. Click the **Search** button (3) to filter the results by the criteria you've defined or click the **Clear** button (4) to reset the filters to their default settings.

- Use the **Print Dashboard** button (5) to prepare a printer-friendly version of the dashboard presented on your screen.

6 The dashboard tiles provide an overview of compliance for the specific record type as well as the breakdown by each facility. The horizontal white line shows overall compliance and figures below the line report:

  - The number of personnel who are required to complete each record type.
  - The number of personnel who are not required or are preferred to complete each record type.
  - Clicking on the tabs for "Required," "Preferred," and "Not Required" will present the number of personnel who are Compliant and Not Compliant for each record type based on your selection. By default, the compliance figures are shown for "Required" personnel.

- On each dashboard tile, you can click on the compliance requirement or the compliance status to generate a report of those personnel.

NOTE: If you would like to edit or remove a dashboard or you would like to create a new dashboard, please contact your organization's point of contact.

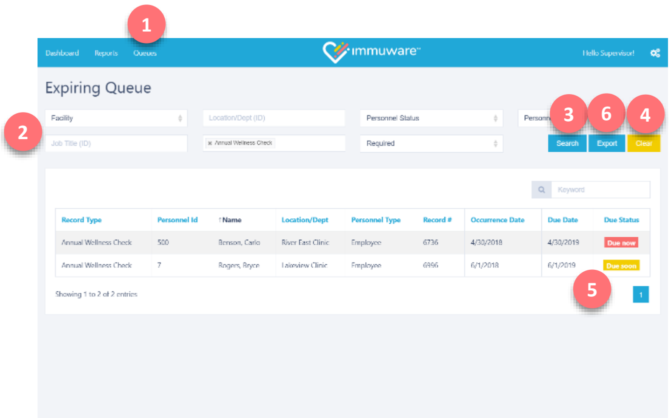

Figure 16

Queues

Expiring Queue

Supervisors have access to the Expiring Queue [Figure 16], 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.

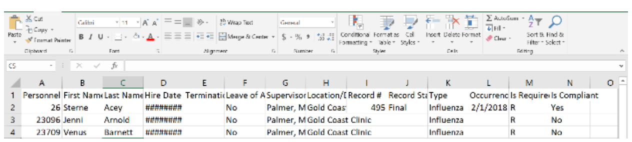

Figure 17

Exporting the Expiring Queue

On the Expiring Queue page [Figure 16], 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 17].

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.