USER REFERENCE GUIDE

ADMINISTRATORS

VERSION 7.5

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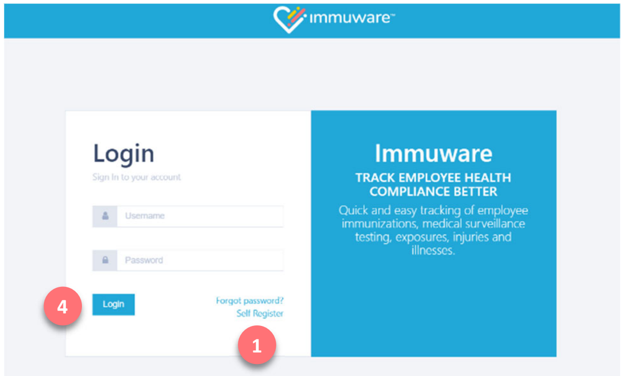

Figure 1

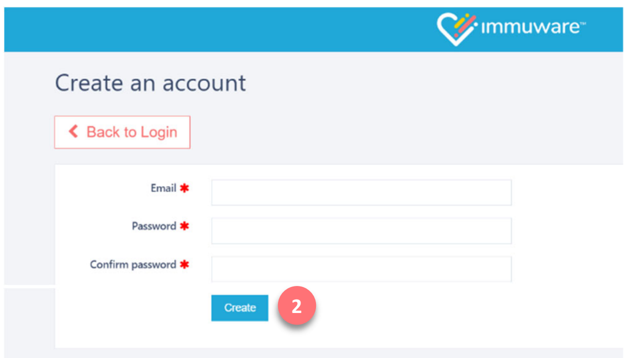

Figure 2

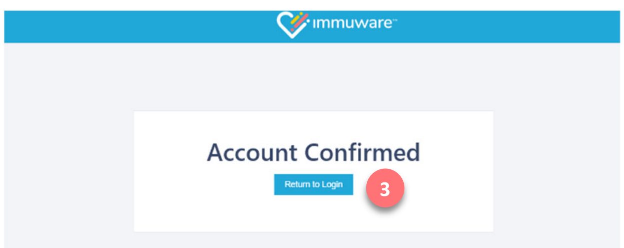

Figure 3

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 5 for more information.

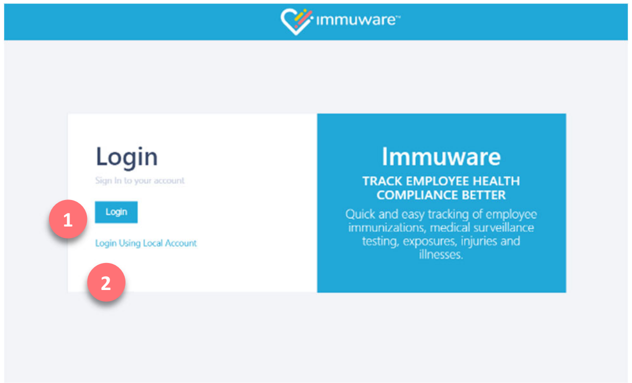

Figure 4

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™.

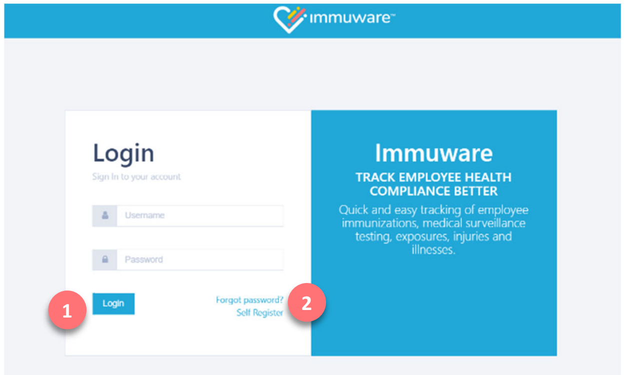

Figure 5

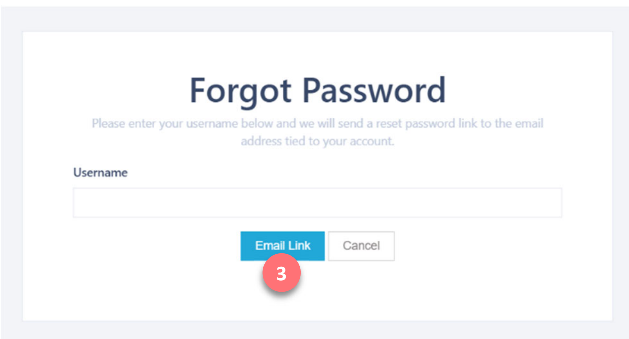

Figure 6

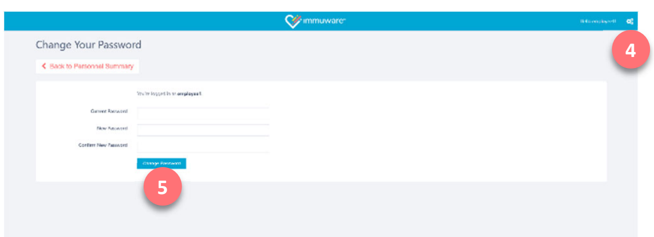

Figure 7

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.

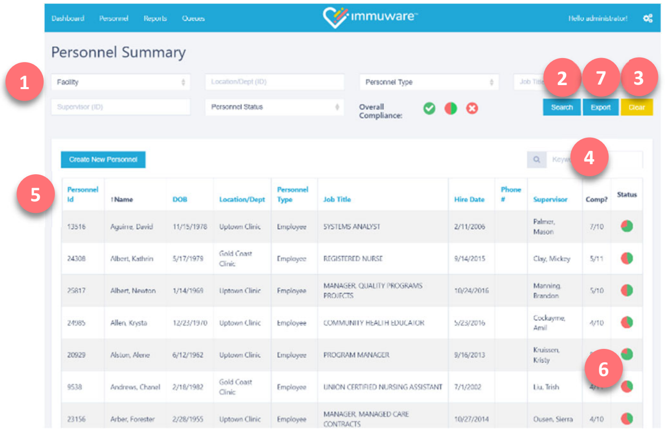

Figure 8

Personnel

Personnel Summary Page

After logging in with your administrator 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.

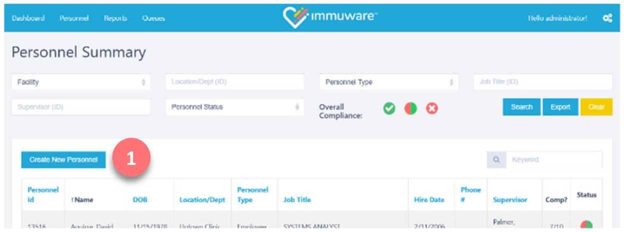

Figure 9

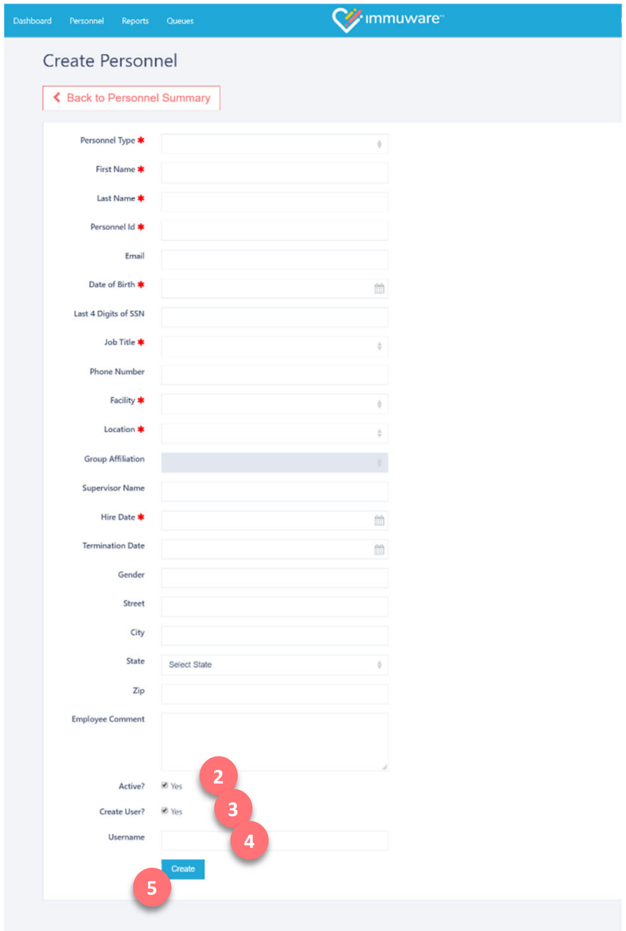

Figure 10

Personnel (continued)

Creating New Personnel

On the Personnel Summary page [Figure 9], click on the **Create New Personnel** button (1) to manually add personnel to your organization's Immuware™ software.

- The Create Personnel page [Figure 10] shows a variety of fields needed to enter personnel. Required fields are indicated by a large red asterisk.
- Check the **Active?** checkbox (2).
- Check the **Create User?** checkbox (3) if you would also like to create a user account for this employee.
- If creating a user account for this employee, enter the username (4) that the employee will use to access Immuware™.
- Click the **Create** button (5) to add the person to your organization.

After you have created the person, verify that their name appears on the Personnel Summary page. If you opted to create a user account for them, they will receive an email message with instructions for activating their account.

NOTE: If your organization uses the optional personnel system integration or imports personnel information using the Immuware™ template shown on the following pages, please be sure that the person you just entered manually is also included in your organization's personnel system and that the Personnel ID matches in each system. The Personnel ID is a unique identifier used to map each person with your organization's data and to update their information in Immuware™ as changes occur (ex. An employee begins a leave of absence or receives a new job title).

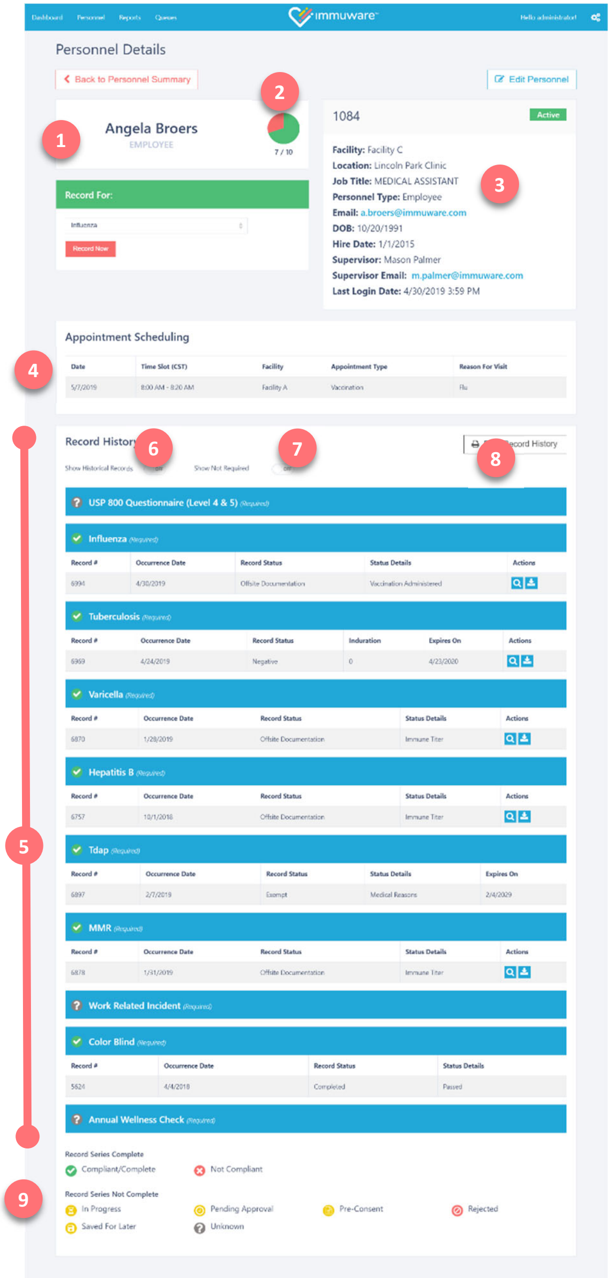

Figure 11

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 11].

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. If your organization is using the optional scheduling module, the Appointment Scheduling section shows any upcoming appointments that this employee has created.
5. 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.
6. 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.
7. Use the **Show Not Required** toggle to show or hide records that this person is not required to complete.
8. 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.
9. 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 12

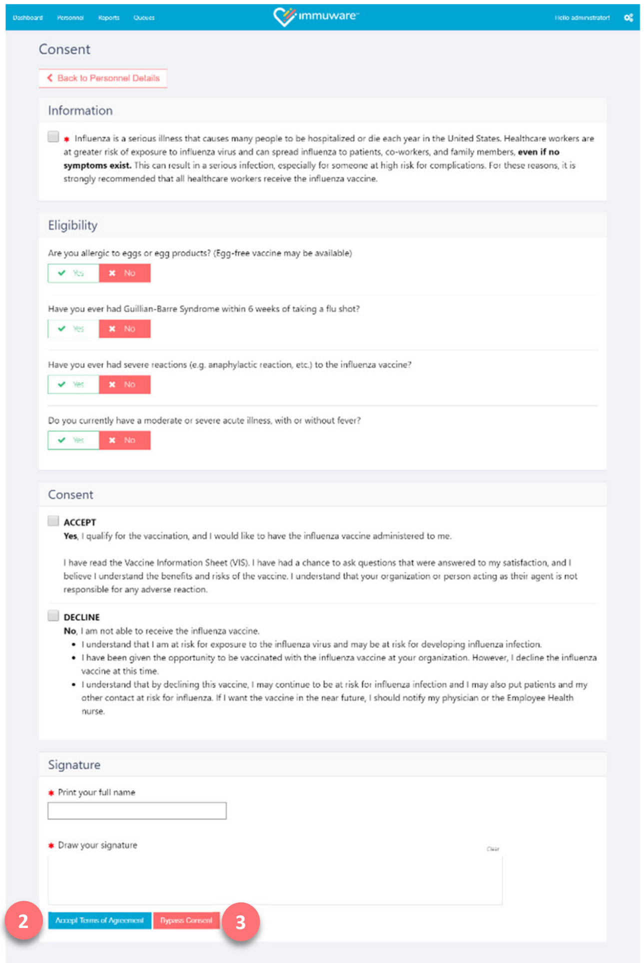

Figure 13

Record Submission

Initiate Record Submission

To document activity for a record type, go to the Personnel Details page [Figure 12].

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

Capture Consent

The Consent page [Figure 13] 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.

NOTE: Administrators may use the Bypass Consent button (3) if they are entering a vaccination or certification that was previously administered. Click the **Bypass Consent** button to skip the Consent page and continue to the Record page.

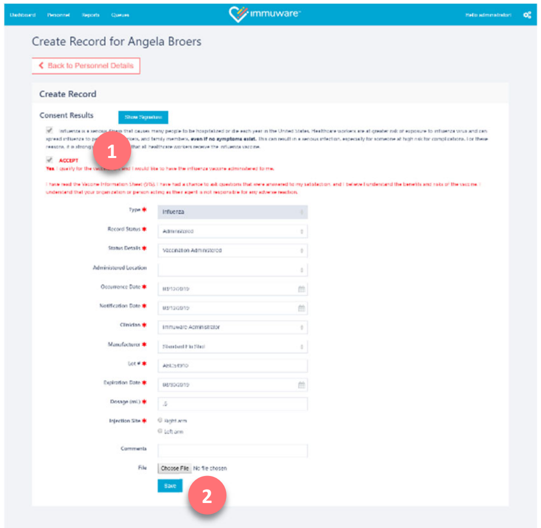

Figure 14

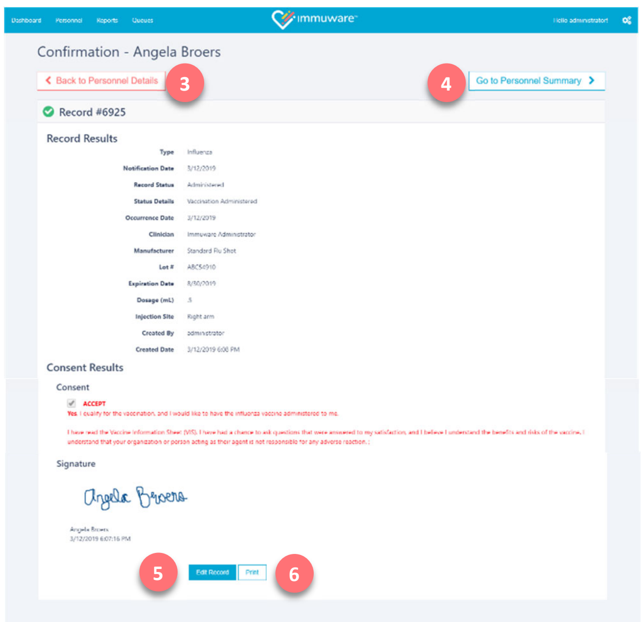

Figure 15

Record Submission (continued)

Enter Record Details

Use the Record page to capture information about the vaccination, test, or certification being administered [Figure 14].

1. The results of the personnel's consent form are shown at the top of the page.
- Enter values in all 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. Please contact your **Immuware™ Account Manager** if you wish to add, remove, or edit any of the fields that are shown on any form.

Confirming a Record

The Confirmation page [Figure 15] 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 16

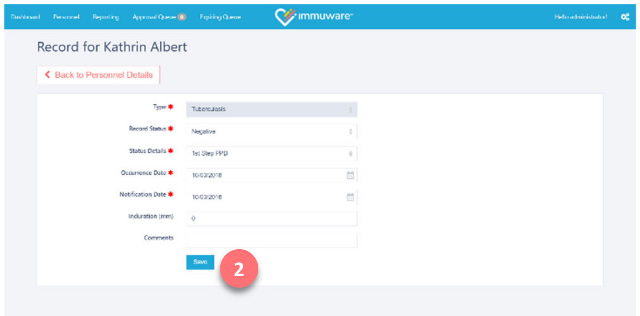

Figure 17

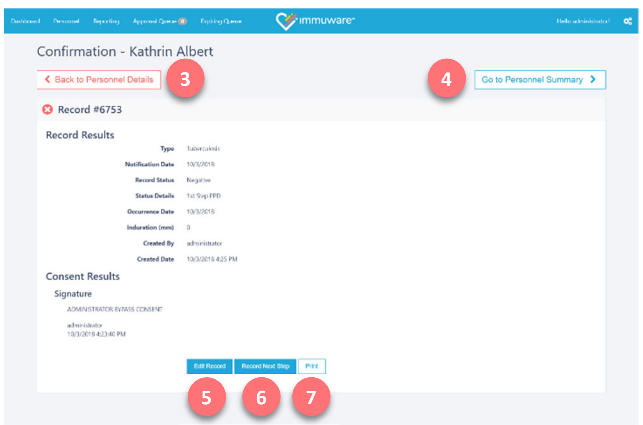

Figure 18

Record Submission (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 16].
- Click the **Record Next Step** button (also available on the Confirmation page).

On the Record page [Figure 17]:

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. Please contact your **Immuware™ Account Manager** if you wish to add, remove, or edit any of the fields that are shown on any form.

Confirming a Record

The Confirmation page [Figure 18] 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 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.

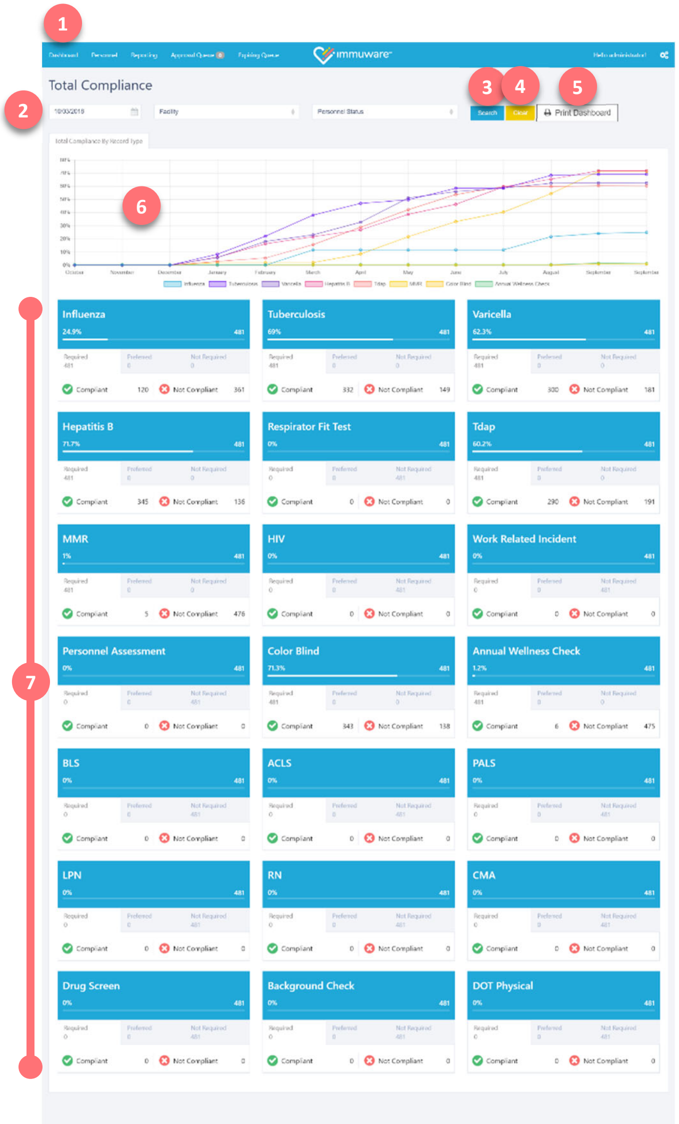

Figure 19

Dashboards

Administrator Dashboards

As an administrator, your dashboards provide a high-level overview of the 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 19] 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 the personnel 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 line graph shows the overall compliance for your organization based on the criteria specified in the filters at the top of the page. Move your cursor over any point in the chart to learn more about the record type and compliance.
- 7 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 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 **Immuware™ Account Manager**.

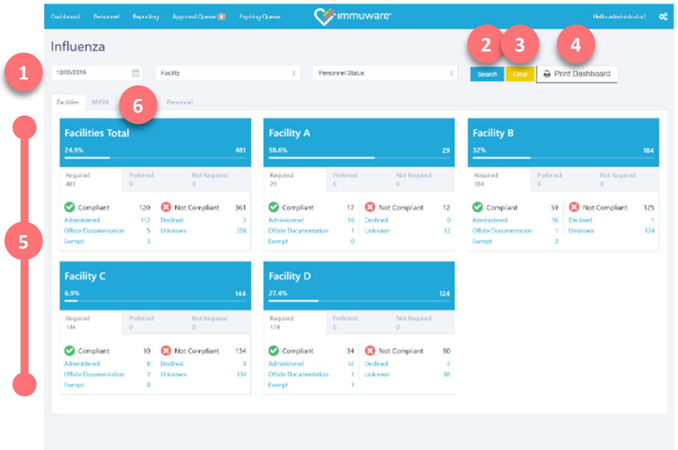

Figure 20

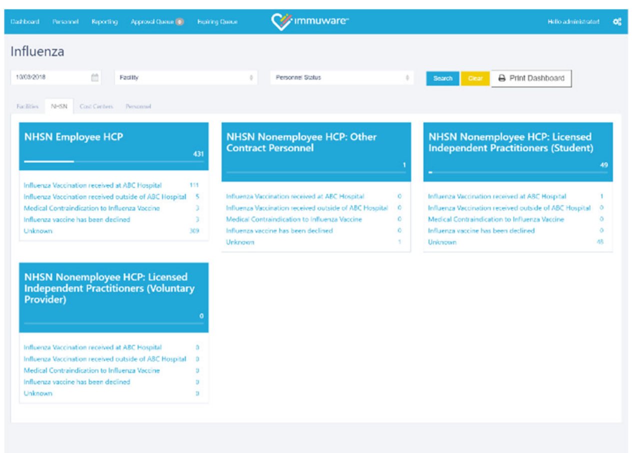

Figure 21

Dashboards (continued)

Individual Record Dashboards

Individual dashboards [Figure 20] are available for each record type and show overall compliance for the specific record type.

1. Filters at the top of the page allow you change the reporting date, the facility that is being reported on, and the status of the personnel that are shown in the figures. 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 **Print Dashboard** button (4) to prepare a printer-friendly version of the dashboard presented on your screen.

5. 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 preferred to complete each record type.
   - The number of personnel who are Compliant for each record type based on your selection for required, not required, or preferred.
   - 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.

6. Tabs near the top of the page allow you to view results by cost center or personnel type.
- On the Influenza dashboard, you can click the tab for **NHSN** to view your organization's NHSN data [Figure 21].

NOTE: If you would like to edit or remove a dashboard or you would like to create a new dashboard, please contact your **Immuware™ Account Manager**.

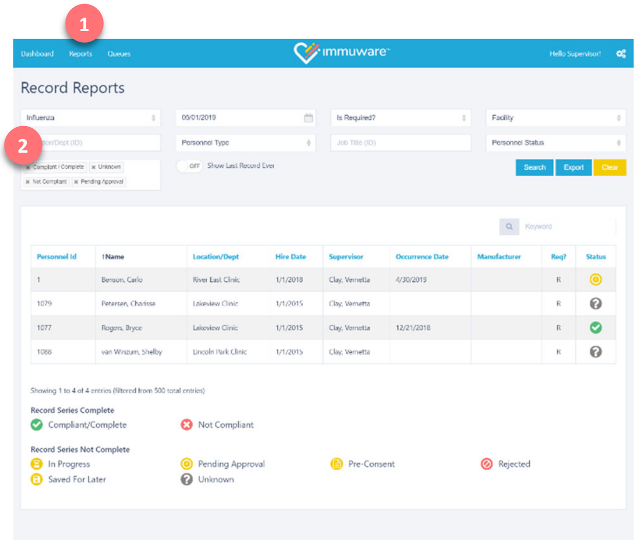

Figure 22

Reporting

Types of Reports

There are three types of reports available to administrators: Single-select Reports, Multi-select Reports, and Appointment Reports (if using the optional scheduling module). These reports can be accessed by clicking on **Reports** (1) in the top menu from any page.

Single-select Reports

To access the Single-select Report page [Figure 22], click on **Reports** (1) in the top menu from any page and select **Records (Single-select)**. 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 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 active employees.
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.

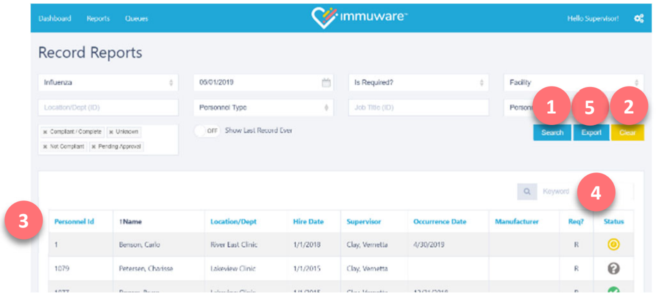

Figure 23

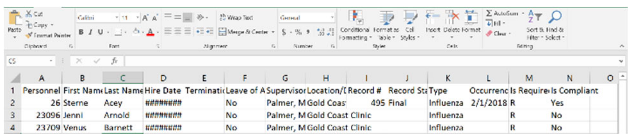

Figure 24

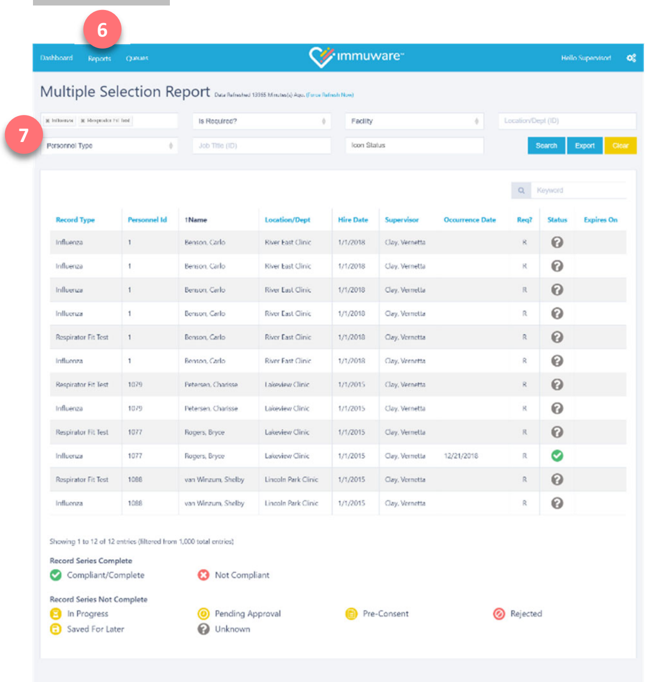

Figure 25

Reporting (continued)

Types of Reports (continued)

Single-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.

The table [Figure 23] 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.

On the Single-select report results page [Figure 23], you can export the report you have generated by clicking the **Export** button (5). This will download a .XLSX file of your report that you can open in Microsoft Excel [Figure 24].

Multi-select Reports

To access the Multi-select Report page [Figure 25], click on **Reports** (6) 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 (7) 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.

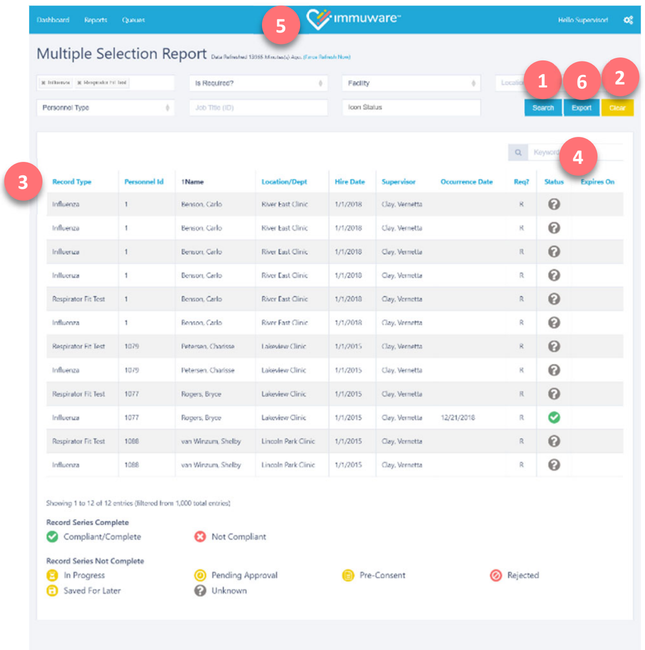

Figure 26

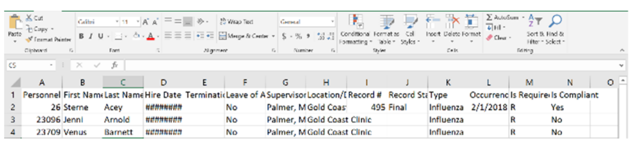

Figure 27

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 26].

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 26], 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 27].

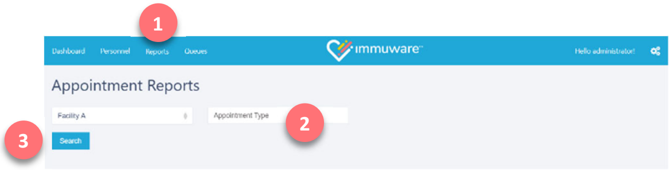

Figure 28

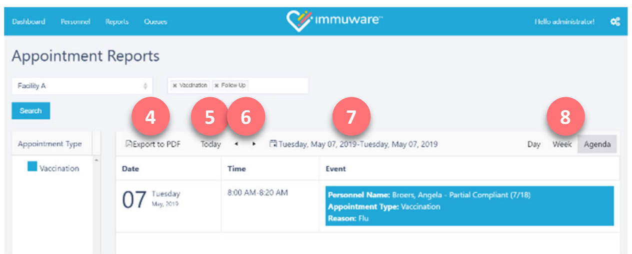

Figure 29

Reporting (continued)

Types of Reports (continued)

Appointment Reports

If your organization is using the optional scheduling module, click on **Reports** (1) in the top menu from any page and select **Appointments** to access the Appointment Reports page [Figure 28]. This page allows you to view and export appointments that have been scheduled by employees. Use the following filters (2) to create your report:

Filter	Description
Facility	Select one facility for your report.
Appointment Type	Select one or many appointment types for your report.

Once the filters have been selected, click the **Search** button (3) to generate results for the criteria you've defined [Figure 29].

- Use the **Export to PDF** button (4) to save the current view as a PDF.
- Use the **Today** button (5) to jump to today's date.
- Use the **arrow buttons** (6) to navigate to different dates.
- Click on the **date range** (7) to change the date that is displayed.
- Use the **Day, Week, and Agenda** buttons (8) to change the view of your report.

You have the capability to view and export Appointments scheduled by personnel based on the Facility location. The personnel also have their scheduled appointments on their "My Profile" page.

You are able to search Appointments by Day, Week, or Agenda in order to keep different appointments organized.

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.

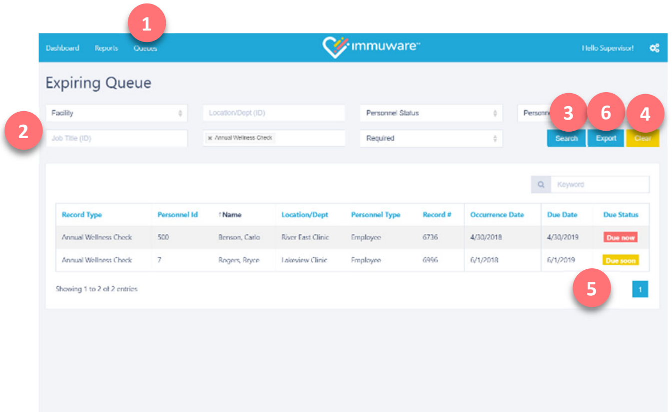

Figure 30

Queues

Expiring Queue

Administrators have access to the Expiring Queue [Figure 30], 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. The “Due Soon” period is set to 30 days by default, but can be configured differently. Please contact your **Immuware™ Account Manager** to make changes.
Due now	Due Now	This record has expired and the employee may not be compliant for this record type any longer.

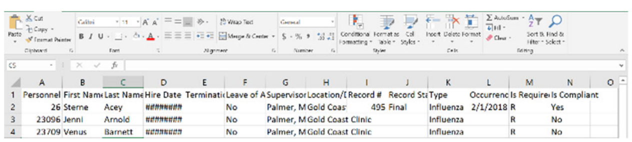

Figure 31

Exporting the Expiring Queue

On the Expiring Queue page [Figure 30], 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 31].

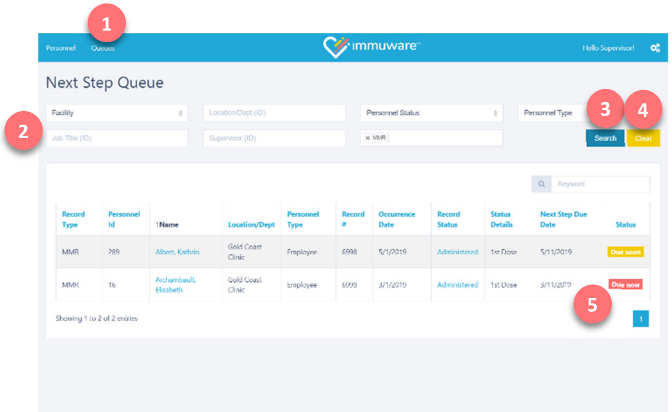

Figure 32

Queues (continued)

Next Step Queue

Administrators have access to the Next Step Queue [Figure 32], where they can check for personnel with multi-step records that 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 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. The “Due Soon” period is configured differently for each step in each record type. Please contact your **Immuware™ Account Manager** to learn more about your default configurations or if you would like to make changes.
Due now	Due Now	This multi-step record is ready for the next step now.

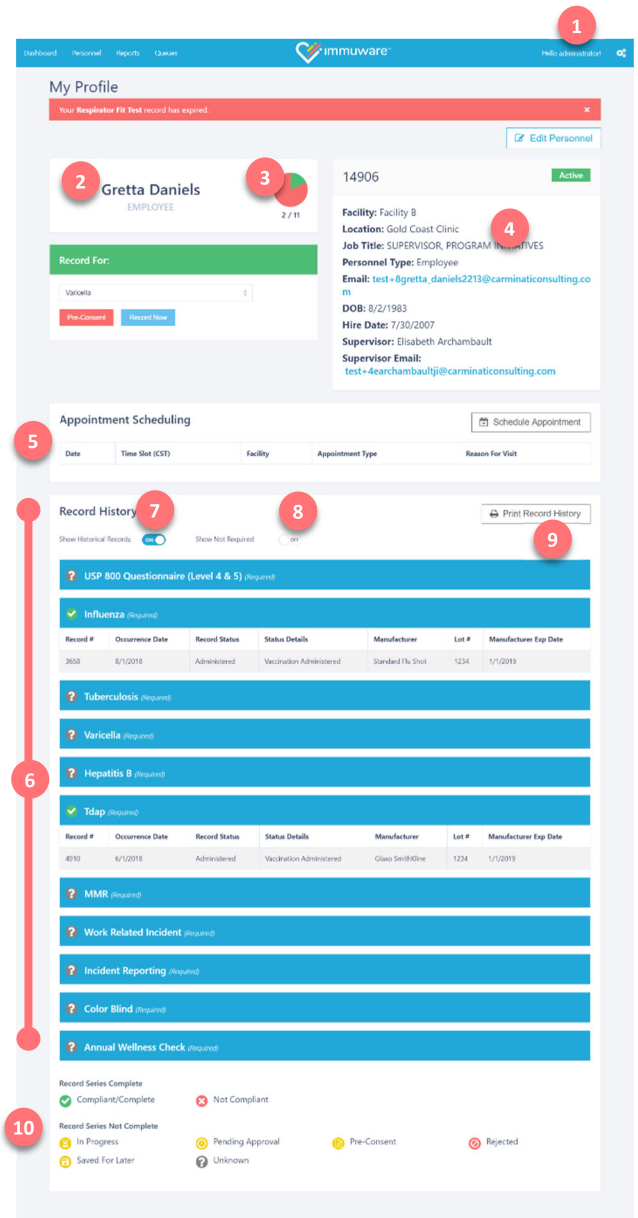

Figure 33

Your Profile

My Profile Page

Click on your username (1) in the upper right corner to access your My Profile page [Figure 33]. Your profile page shows a variety of information including:

2. Your name and personnel type.
3. Your ratio of Compliant records to Not Compliant records that you are 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.
4. Basic information about you as maintained by your organization.
5. If your organization is using the optional scheduling module, the Appointment Scheduling section shows any upcoming appointments that you have scheduled.
6. 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.
7. 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.
8. Use the **Show Not Required** toggle to show or hide records that you are not required to complete.
9. The **Print Record History** button prepares a printer-friendly version of the personnel details page including your record history. The printout will reflect the selections for the Show Historical Records and Show Not Required toggles.
10. The record status icon key explains the icons shown beside each record type. See page 10 for more information about these icons.

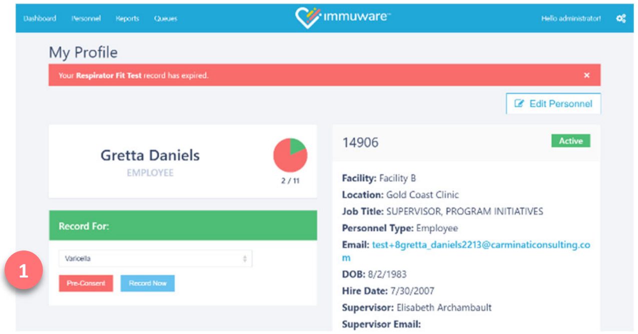

Figure 34

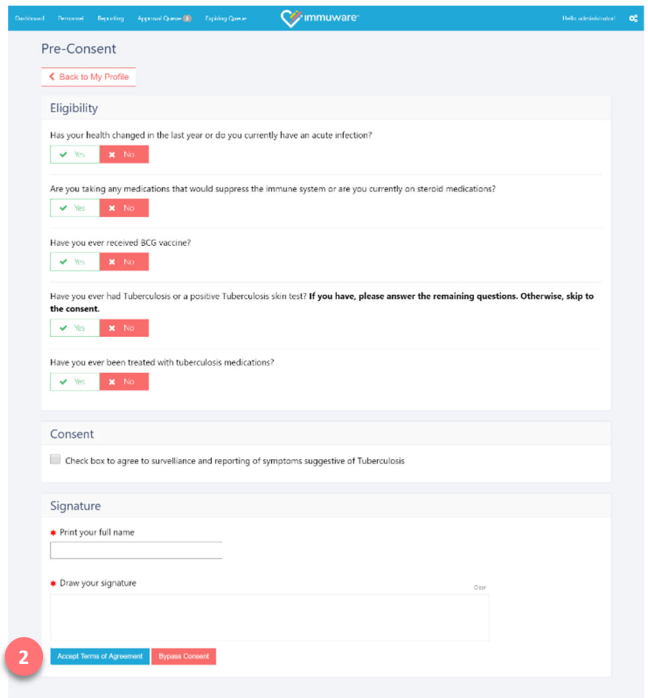

Figure 35

Your Profile (continued)

Completing Pre-Consent Forms

You can save time by completing your consent forms for vaccinations or certifications from your Personnel Details page [Figure 34].

1 Select the record type from the dropdown menu and click the **Pre-Consent** button.

A consent form will appear based on the specific record type that you selected [Figure 35].

- Complete all required fields, indicated by a large red asterisk.
- Review the eligibility questions and mark your responses.
- Select the Consent checkbox.
- Type your full name in the Signature box.
- Sign your 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, use your finger or a stylus to draw your signature on the screen.
- Click on the **Accept Terms of Agreement** button (2) once you have completed the consent form.

Once you complete the pre-consent form, you will return to your My Profile page and you will see a yellow icon next to the record type indicating you have completed your pre-consent form.

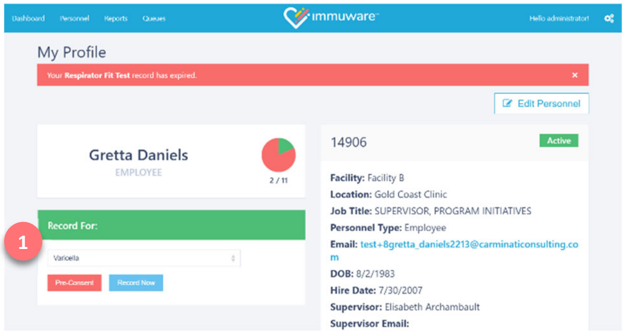

Figure 36

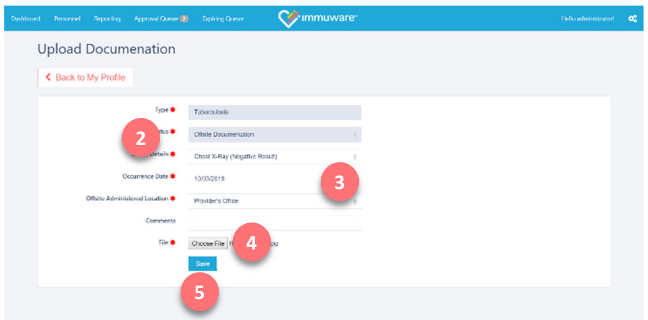

Figure 37

Your Profile (continued)

Uploading Documentation

If you received a vaccination or certification outside of your organization, you can upload documentation from your My Profile page [Figure 36] for administrative review.

1. Select the record type from the dropdown and click the **Upload Documentation** button.

The Upload Documentation form will appear based on the specific record type that you selected [Figure 37].

2. Complete all required fields, indicated by a large red asterisk.
3. Enter the Occurrence Date that you received the vaccination or certification.
4. Click the **Choose File** button to upload your offsite documentation.
5. Click on the **Save** button to submit your offsite documentation for review.

Once you complete the Upload Documentation form, you will return to your My Profile page and you will see a yellow icon next to the record type indicating your record has been submitted for review and approval.

USER REFERENCE GUIDE

APPLICATION CONFIGURATION

VERSION 7.2

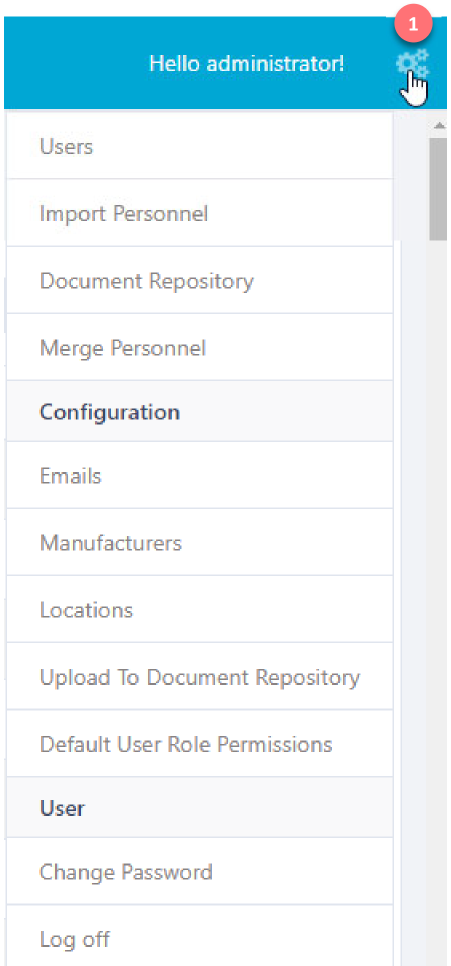

Figure 38

Application Configuration

Introduction to Administrator Tools

There are a number of administrator tools [Figure 38] that you can use to configure your Immuware™ software. To access these administrator tools, click the gears icon (1) in the upper right corner of any screen.

Depending on your organization's Immuware™ configuration and the optional modules your organization is using, you may see some or all of the following options in the dropdown menu:

- **Users** provides an overview of all users in your Immuware™ system and gives administrators the ability to manually create new users.
- **Import Personnel** allows administrators to batch create, modify, or delete peronnel or to check the results of automated imports from the optional personnel system integration.
- **Document Repository** allows administrators to store vaccine information statements, organization policies, and other documents for quick reference by employees.
- **Merge Personnel** allows administrators to combine two personnel records into one record.

Additionally, there are a number of Configuration options to select from, including:

- **Emails** allows administrators to configure automated email notifications to supervisors or employees based on record type, compliance status, or by record status details.
- **Manufacturers** allows administrators to add information about vaccinations and tests that will appear in the dropdown menus on the record pages.
- **Locations** allows administrators to configure the onsite and offsite locations where personnel can receive vaccinations and/or complete compliance requirements.
- **Upload to Document Repository** allows administrators to upload files to the document repository mentioned above.
- **Default User Role Permissions** allows administrators to specify the permissions that new users should receive based on their role.

Review the following pages to learn more about each of these administrator tools. If there are additoinal configuration changes that you would like to make beyond the tools available to you, please contact your **Immuware™ Account Manager** for more information.

On page 6 of this guide we discussed the **Change Password** function. You can also choose the **Log Off** option to log out of your Immuware™ account.

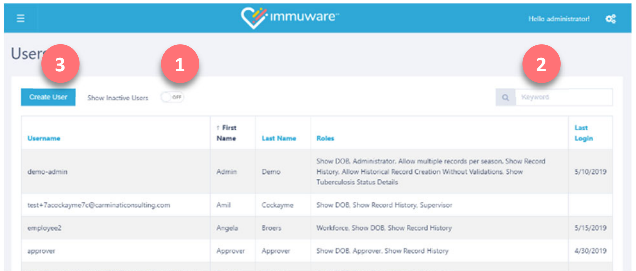

Figure 39

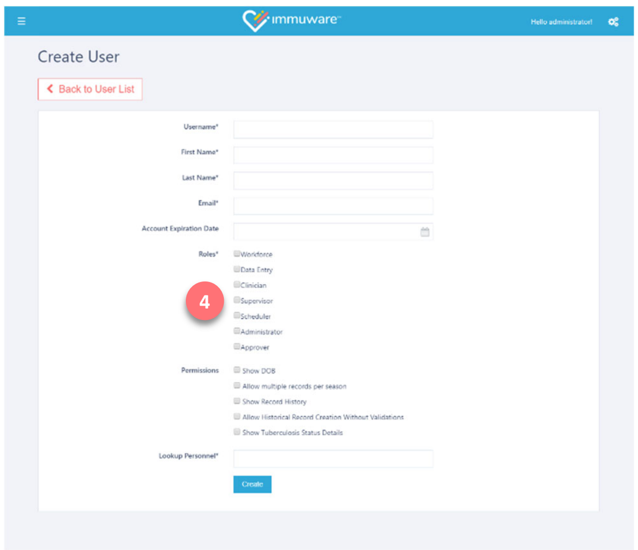

Figure 40

Application Configuration (continued)

Users

Select the **Users** menu option from the Immuware™ administrator tools dropdown to see a list of all individuals who can access Immuware™ and the role(s) assigned to each user [Figure 39].

Use the **Show Inactive Users** toggle switch (1) to show or hide user accounts that have been deactivated and use the Keyword Search box (2) to search for a particular user.

To create a new user, click the **Create User** button (3) to open the Create User page [Figure 32].

- Complete the required fields on the page.
- Assign the applicable role(s) and permission(s) by clicking the applicable check boxes (4):

Role	Description
Workforce	Workforce users can view their Personnel Details page and record history, upload documentation, complete pre-consent forms and questionnaires, and schedule appointments (if using the optional scheduling module).
Data Entry	Data entry users can view all personnel and can view, edit, and submit new records.
Clinician	Clinician users can view all personnel and can view and submit new records.
Supervisor	Supervisor users can view dashboards, reports, and compliance for their direct reports. Accurate reports are dependent on the accuracy of your personnel file and supervisor records.
Scheduler	Scheduler users can configure appointment availability, review calendars, and view scheduled appointments (if using the optional scheduling module).
Administrator	Administrator users can view all personnel and can configure Immuware™ including viewing, editing, and submitting new records.
Approver	Approver users can access the approval queue where they can review, approve and reject records uploaded by employees.

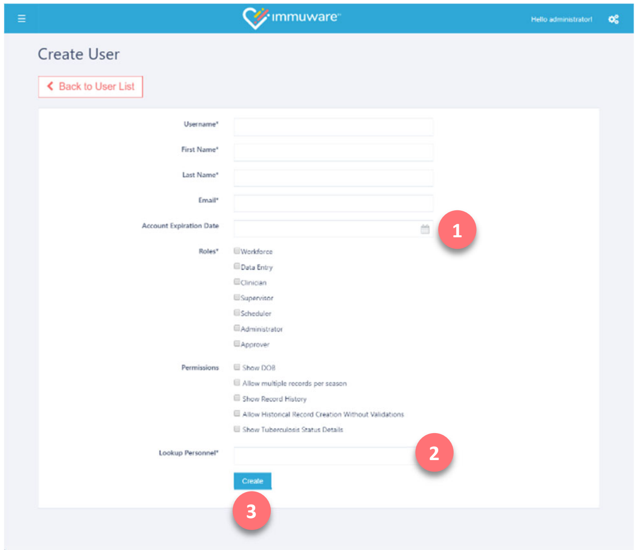

Figure 41

Application Configuration (continued)

Permission	Description
Show DOB	When checked, this user will be able to view personnel's date of birth. When unchecked, the date of birth will be hidden.
Allow multiple records per season	When checked, this user will be able to create multiple records during one season. When unchecked, an error message will prevent them from creating multiple records during one season. *Example: If an employee declines a flu shot and then returns at a later date to receive a flu shot, these would be multiple records during the same season.*
Show Record History	When checked, this user will be able to view the record history for personnel on their personnel detail page. When unchecked, they will be able to access the personnel details page and create records (depending on their assigned role) but will be unable to view the personnel's record history.
Allow Historical Record Creation Without Validations	When checked, this user will be able to activate a toggle switch on the record creation page that overrides the requirements for certain fields to be completed. When unchecked, this user will be required to enter all required information as they create a record. *Example: If a user needs to enter historical records that do not contain all the information that is now required.*
Show Tuberculosis Status Details	When checked, this user will be able to view personnel's Tuberculosis status details. When unchecked, the user will be able to view the personnel's compliance for Tuberculosis but will not see the specific status details.

To create a user account, you must specify an account expiration date (1) or choose a personnel record (2) to associate the user account with. If you associate the user account with a personnel record and that person's personnel record is terminated, the user account will be inactivated as well.

3 Click the **Create** button to create the new user account.

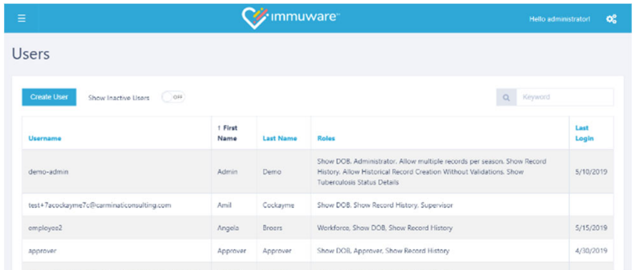

Figure 42

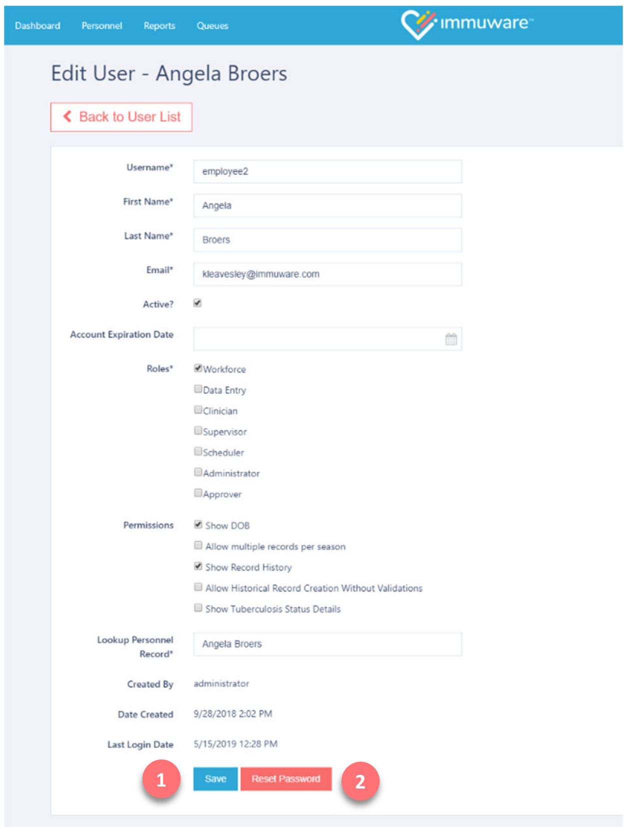

Figure 43

Application Configuration (continued)

Editing Users

To edit an existing user, click on the desired row from the Users page [Figure 42] to open the Edit User page [Figure 43].

- Complete any changes.
- 1 Click the **Save** button to save the user account.

If your organization does not use single sign-on (SSO) authentication to access Immuware™ you can reset a user's password from the Edit User page. Click the Reset Password button (2) to send an email to the user with instructions for resetting their password.

If your organization is using single sign-on (SSO) authentication to access Immuware™ they will need to use your organization's forgot password process to reset their password.

Figure 44

Application Configuration (continued)

Import Personnel

Select the **Import Personnel** menu option from the Immuware™ administrator tools dropdown to batch create, modify, or delete personnel [Figure 44]. This functionality mimics what the optional integration with your personnel system accomplishes automatically.

You can download a template for importing personnel using the **Download Import Template** button (1). This template lists all of the headings needed for Immuware™ to recognize your personnel and the definitions for each heading can be found in the appendix at the back of this guide.

To import the personnel data file, save the template as a .txt file or a comma delimited .csv file and click on the **Choose File** button (2). Select the appropriate yes/no radio button for Skip First Row? depending on whether or not your file includes headers and choose the appropriate delimiter (bar or comma) from the dropdown menu. Click the **Upload** button (3) once you are ready to import the data.

The table at the bottom of the page provides a summary of manual personnel imports as well as those brought in from the integration with your personnel system (if applicable). If any imports were completed with errors or warnings, click on the row to review additional details. Columns with blue headers can be clicked to sort by ascending or descending order.

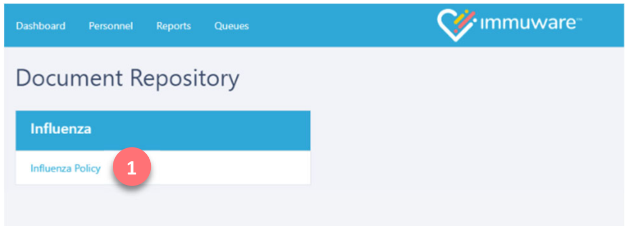

Figure 44

Application Configuration (continued)

Document Repository

Select the **Document Repository** menu option from the Immuware™ administrator tools dropdown to view all of the documents that have been added to the document repository. These files may include vaccination information statements, organization policies, and othe documents for quick reference by employees.

Click on the name of the document (1) to open it. Depending on the document type, it may download directly to your computer or it may open in a new browser window.

To upload additional documents to the document repository, refer to the **Upload to Document Repository** section on page 40.

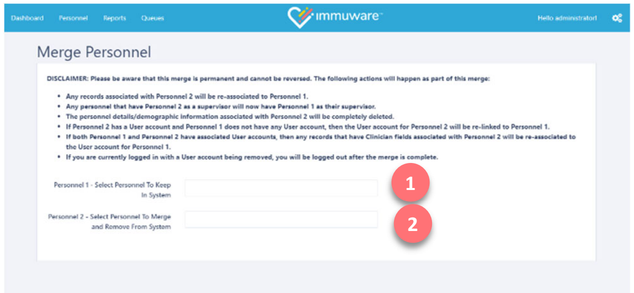

Figure 45

Application Configuration (continued)

Merge Personnel

Occassionally you may encounter a situation where you have entered two personnel records for the same person and you wish to merge those personnel records. Select the **Merge Personnel** menu option from the Immuware™ administrator tools dropdown to open the Merge Personnel page [Figure 45].

To merge two personnel records:

1. Enter the name of the personnel record to keep in the system (Personnel 1).
2. Enter the name of the personnel record to merge/remove from the system (Personnel 2).

Once you have entered two valid personnel record names, a blue **Merge** button will appear. Click the Merge button to fully merge these personnel records.

Important Information about Merging Personnel Records:
Merging personnel is permanent and cannot be reversed. The following will occur during the merge:

1. Any records associated with Personnel 2 will be re-associated to Personnel 1.
2. Any personnel that have Personnel 2 as a supervisor will now have Personnel 1 as their supervisor.
3. The personnel details/demographic information associated with Personnel 2 will be completely deleted.
4. If Personnel 2 has a User account and Personnel 1 does not have any User account, then the User account for Personnel 2 will be re-linked to Personnel 1.
5. If both Personnel 1 and Personnel 2 have associated User accounts, then any records that have Clinician fields associated with Personnel 2 will be re-associated to the User account for Personnel 1.
6. If you are currently logged in with a User account being removed, you will be logged out after the merge is complete.

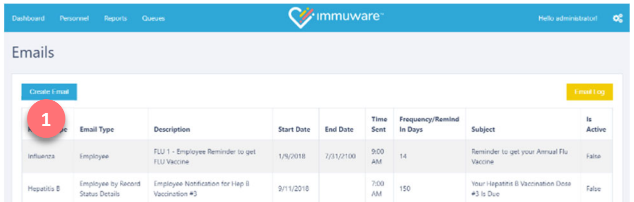

Figure 46

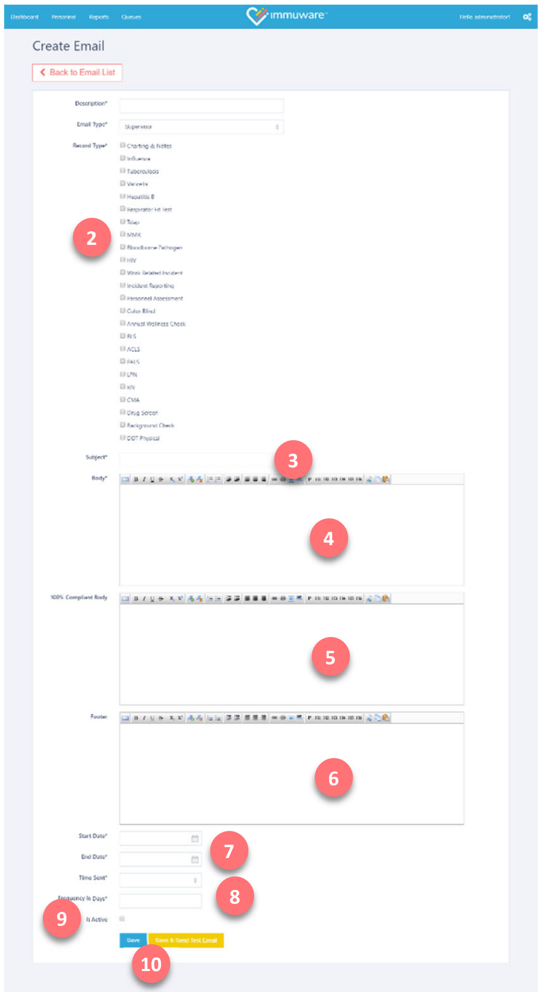

Figure 47

Application Configuration (continued)

Emails

Select the **Emails** menu option from the Immuware™ administrator tools to configure automated email notifications to supervisors or employees [Figure 46]. There are four types of email messages that you can configure and send using Immuware™:

- Supervisor (by Record Type) – See appendix for an example email message
- Employee (by Record Type) – See appendix for an example email message
- Employee (by Record Status) – See appendix for an example email message
- Employee (by Record Status Details) – See appendix for an example email message

To create a new email, click the **Create Email** button (1) to open the Create Email page [Figure 47]. Enter a description for the email that clearly defines its purpose and select the email type from the dropdown menu.

Emails to Supervisors (see appendix for an example email message)

You can send emails to supervisors with a summary of their direct report's compliance.

2. Select the **record type(s)** you would like to report on using the checkboxes.
3. Enter a **Subject** for the email message.
4. The **Body** field is the text that is shown before the automated vaccination/test/certification results generated by Immuware™.
5. Use the **100% Compliant Body** field to include a message to supervisors once their staff achieve total compliance for the record types you have selected.

- Between the Body and Footer fields, Immuware™ will insert text that informs the supervisor of their total number of staff and the number who are Compliant and Not Compliant for each record type.

6. Use the **Footer** field to include text after the automated vaccination/test/certification results generated by Immuware™.
7. Select a **Start Date** and **End Date** to define the period when your email will be sent to supervisors and the **Time Sent** to specify the time when the email should be sent out.
8. Use the **Frequency in Days** to specify how regularly the email should be sent out during the time period specified above.
9. The **Is Active** checkbox determines whether Immuware™ should send this specific email to supervisors or if it should be dormant.
10. Use the **Save** button to save the email or use the **Save & Send Test Email** button to save the email and send a test copy to the email address associated with your user account.

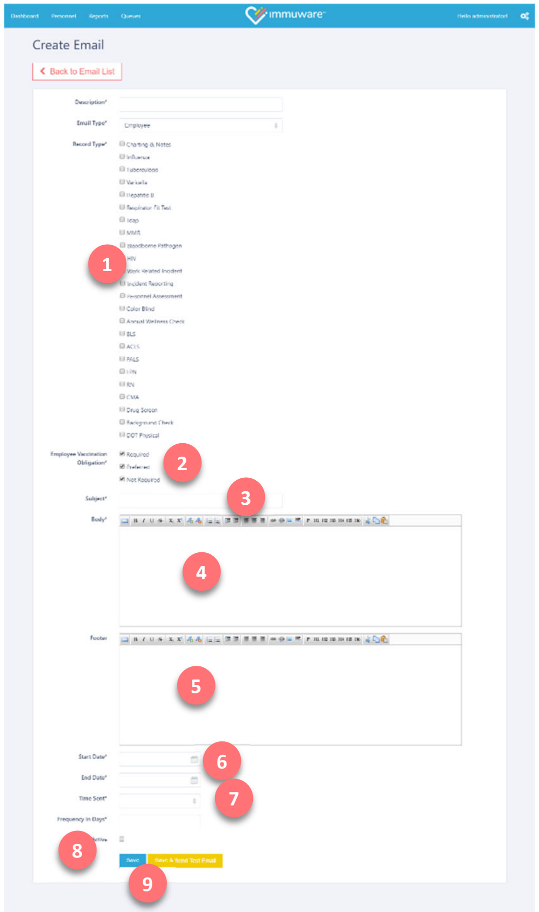

Figure 48

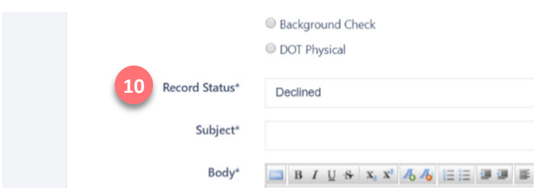

Figure 49

Emails to Employees (see appendix for an example email message)

Similar to the emails you can send to supervisors, you can send messages directly to employees regarding their compliance [Figure 48]. Once a person achieves compliance for the record(s) you selected, they will stop receiving the reminder emails.

1. Select the **record type(s)** you would like to report on using the checkboxes.
2. Choose from **Required, Preferred, and Not Required** to determine if everyone will receive this email or just the personnel who are required, preferred, and/or not required to be compliant for the particular record(s).
3. Enter a **Subject** for the email message.
4. The **Body** field is the text that is shown before the automated vaccination/test/certification results generated by Immuware™.
   - Between the Body and Footer fields, Immuware™ will insert text that informs the employee of their compliance status.
5. Use the **Footer** field to include text after the automated vaccination/test/certification results generated by Immuware™. If your organization uses the optional employee portal, include a note in the footer of your email reminding them to login and check their Personnel Details page to see their employee health record.
6. Select a **Start Date** and **End Date** to define the period when your email will be sent to employees and the **Time Sent** to specify the time when the email should be sent out during the time period specified above.
7. Use the **Frequency in Days** to specify how regularly the email should be sent out.
8. The **Is Active** checkbox determines whether Immuware™ should send this specific email to supervisors or if it should be dormant.
9. Use the **Save** button to save the email or use the **Save & Send Test Email** button to save the email and send a test copy to the email address associated with your user account.

Emails to Employees by Record Status (see appendix for an example email message)

You can also target employees based on their current record status value [Figure 49]. For example, you may want Immuware™ to send an email to everyone whose Influenza record status is "Declined" to ask them to reconsider getting the flu shot this season. You would choose "Influenza" from the Record Type options and select "Declined" from the dropdown menu (10) before completing your message.

At the bottom of the page, use the Remind In Days field to tell Immuware™ how many days the system should wait before sending the email notification. In the flu shot example above, you might enter "7" in the Remind in Days field to tell Immuware™ to wait one week from the day the employee declines the flu shot before sending them an email to reconsider their decision.

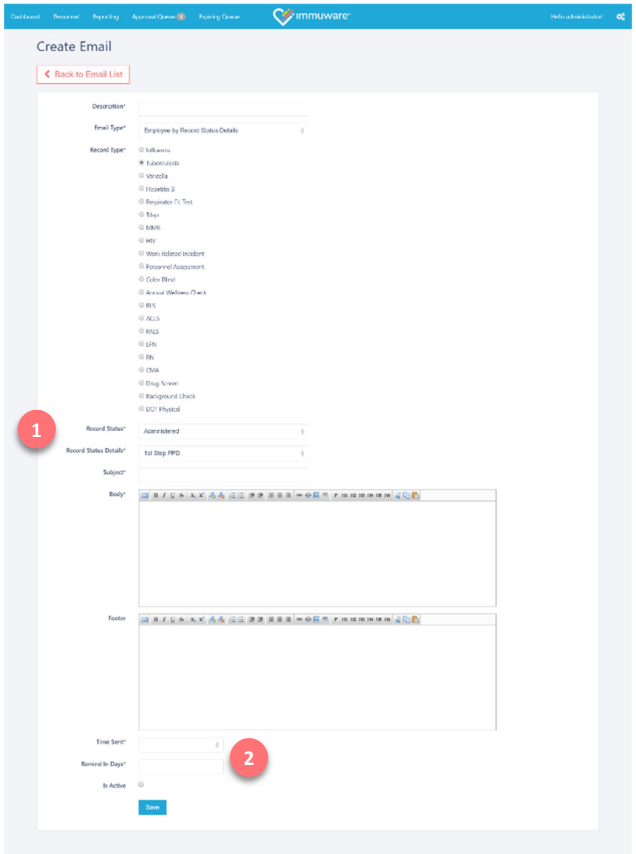

Figure 50

Emails to Employees by Record Status Details (see appendix for an example email message)

Much like the emails you can send to employees based on their record status, you can also send targeted email communication to employees based on their current record status details value [Figure 50]. This feature is especially useful for reminding employees to come back for follow-up visits. For example, you may want Immuware™ to remind employees to return to the Employee Health office to have their TB PPD Skin Test read.

You would select “Tuberculosis” from the Record Type options, “Administered” from the Record Status options, and “1st Step PPD” from the Record Status Details (1) before completing your message.

At the bottom of the page, use the Time Sent field to specify the time when the email should be sent out and use the Remind In Days field (2) to tell Immuware™ how many days the system should wait before sending the email notification. In the example above, you might enter “2” in the Remind in Days field to tell Immuware™ to wait two days from the day the employee receives the TB PPD Skin Test until sending them an email reminding them to come back to have their test results read.

TIP: Emails to Employees by Record Status and Emails to Employees by Record Status Details do not have Start Date and End Date fields. Any time a person’s record history meets the criteria you’ve specified, they will receive this email reminder.

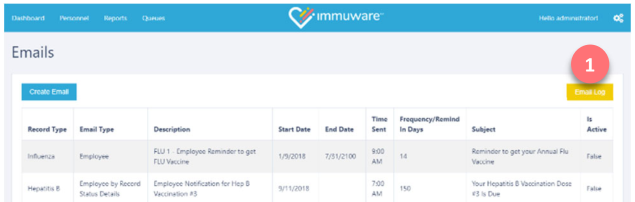

Figure 51

Figure 52

Editing an Existing Email

To edit an existing email or to set an active email to inactive, select the **Emails** menu option from the Immuware™ administrator tools [Figure 51] and click on the row of the email you'd like to change to open the Edit Email page. Complete any changes needed and click the **Save** button at the bottom of the page.

Reviewing the Email Log

To view the Email Log [Figure 52], click on the yellow **Email Log** button on the Emails page [Figure 51]. The Email Log will display a list of emails that Immuware™ has sent to your personnel as well as the success count and error count for those emails.

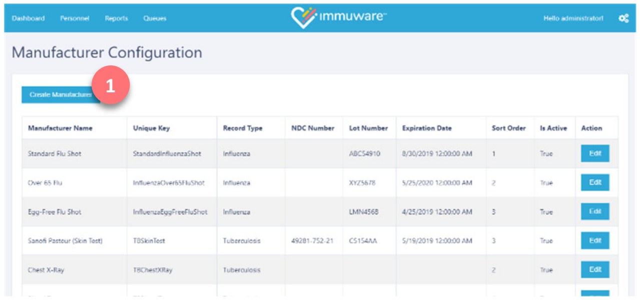

Figure 53

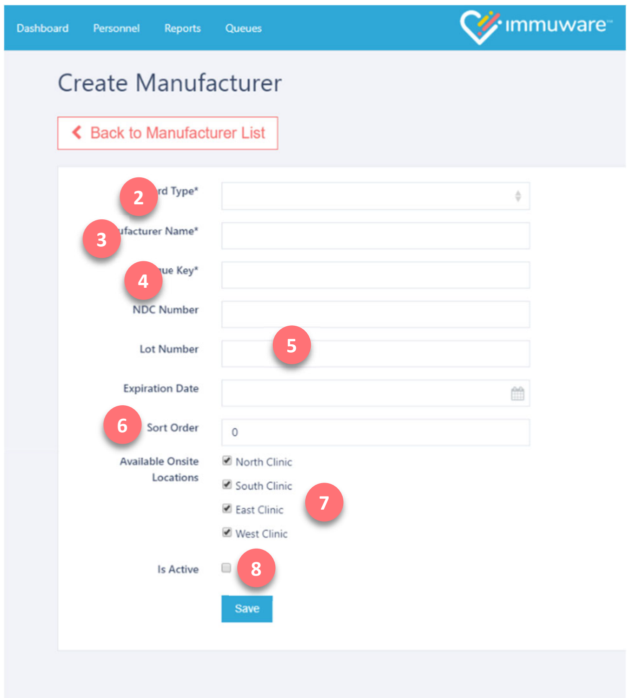

Figure 54

Application Configuration (continued)

Manufacturers

Select the **Manufacturers** menu option from the Immuware™ administrator tools dropdown to access the Manufacturer Configuration page [Figure 53]. The Manufacturer Configuration page shows a list of all of the vaccine manufacturers that have been entered into Immuware™ to facilitate quick input when administrators and clinicians are entering records.

To add a manufacturer to Immuware™, click on the **Create Manufacturer** button (1) to open the Create Manufacturer page [Figure 54].

2. Use the **Record Type** dropdown to choose which record this manufacturer should be associated with.
3. Fill in the **Manufacturer Name** field with your manufacturer or brand name.
4. The **Unique Key** is used for internal record purposes and is not visible outside of the Manufacturer pages. It must be different for each manufacturer entry. We recommend using a combination of the manufacturer or brand name and the lot number to avoid duplication.
5. If known, complete the **NDC Number**, **Lot Number**, and **Expiration Date** so that it is automatically populated when a clinician or administrator chooses this manufacturer from the dropdown menu on the Record page.
6. Use the **Sort Order** field to determine the order that your manufacturers appear in that record dropdown. The manufacturer with the value of "1" in the Sort Order field will appear first, "2" will appear second, etc.
7. Use the **Available Onsite Locations** checkboxes to indicate which locations should be able to choose this manufacturer lot number on the Record page. (If a location is missing from these options, see the Locations guide on the following page to add a location to Immuware™).
8. Use the **Is Active** checkbox to indicate whether or not this manufacturer should appear on the dropdown menu on the Record page or if you would like this manufacturer to be dormant at this time.

TIP: If you have multiple lot numbers from the same manufacturer or brand name, you should create a new manufacturer record for each lot number. Alternatively, you could leave the Lot Number field blank and administrators or clinicians would be required to type the lot number in manually each time they administer a vaccine.

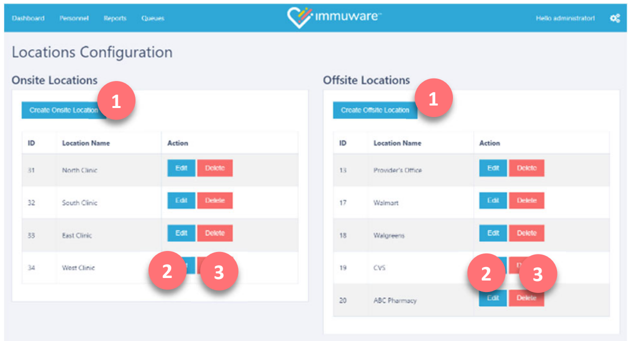

Figure 55

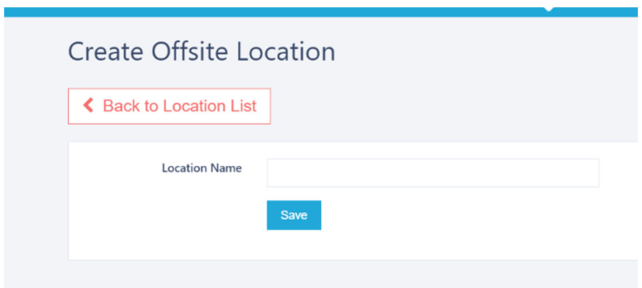

Figure 56

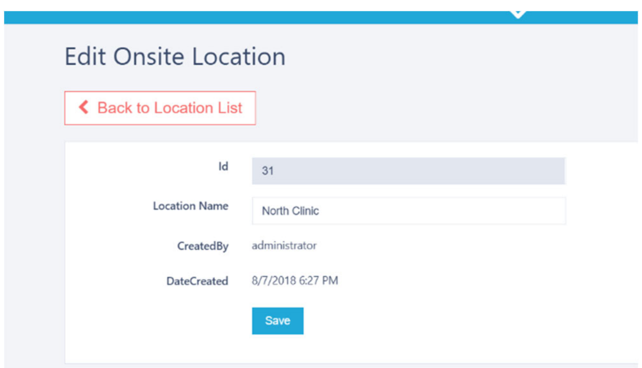

Figure 57

Application Configuration (continued)

Locations

Select the **Locations** menu option from the Immuware™ administrator tools dropdown to access the Locations Configuration page [Figure 55]. The Location Configuration page shows a list of all of the onsite and offsite locations that have been entered into Immuware™ to facilitate quick input when administrators and clinicians are entering records.

Onsite locations are facilities or departments within your organization where personnel can receive vaccinations or can complete compliance requirements (ex. Employee Health Office). Offsite locations are facilities in your community where employees can receive vaccinations or can complete compliance requirements *and* they will provide documentation to satisfy your organization's compliance requirements (ex. Walmart or CVS).

To add a new location to either list, use the **Create Onsite Location** or **Create Offsite Location** button at the top of the page (1). The Create Location page will appear [Figure 56]. Enter the name of the department or facility in the Location Name box and click the **Save** button to add the location.

To edit an existing location, click on the **Edit** button (2) on the Locations Configuration page [Figure 55]. The Edit Location page will appear [Figure 57]. Compete any necessary changes and then click the **Save** button to update the location.

To delete an existing location, click on the Delete button (3) on the Locations Configuration page [Figure 57]. A page will appear asking you to confirm that you want to delete this location. Click the **Delete** button to delete the location or click the **Back to List** link to return to the locations list.

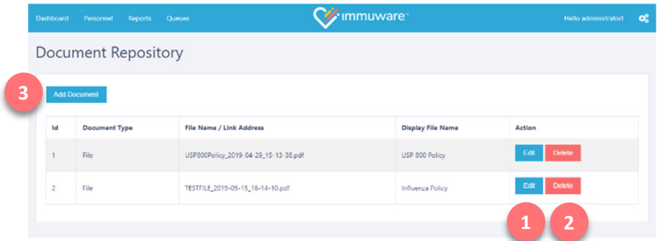

Figure 58

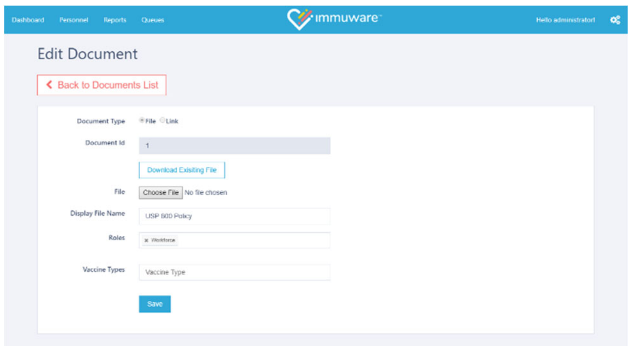

Figure 59

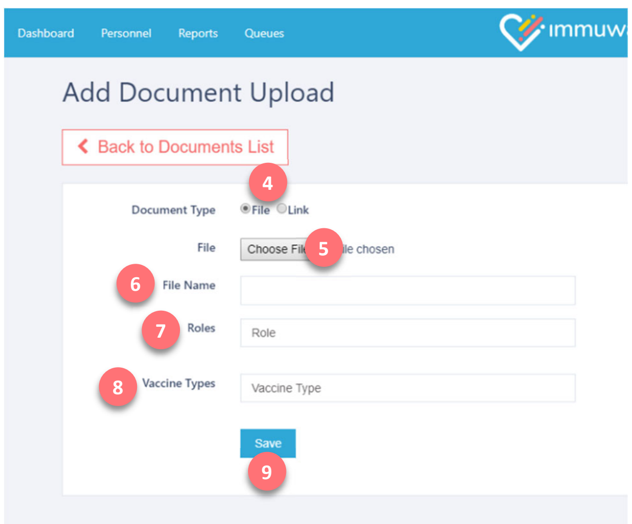

Figure 60

Application Configuration (continued)

Upload to Document Repository

Select the **Upload to Document Repository** menu option from the Immuware™ administrator tools dropdown to access the Document Repository upload page [Figure 58].

Viewing and Editing Documents

To view and edit existing documents, click the **Edit** button (1) to open the Edit Document page [Figure 59]. From this page you can download the existing file, upload a new file, change the display file name, specify the roles that are able to view the file, and specify the vaccine type(s) that this file should be associated with. Click the **Save** button once your changes are complete.

Deleting Documents

To delete existing documents, click the **Delete** button (2) and a Delete Document pop-up window will appear. Deleted documents are permanently deleted and cannot be restored.

Adding Documents

To add a new document, click the **Add Document** button (3) to open the Add Document Upload page [Figure 60].

4 Specify whether this is a **File** that will download to the user's computer or this is a **Link** that should open in a new browser window.
5 If this is a file, use the **Choose File** button to browse your computer and locate the file. If this is a link, copy and paste the URL into the Link Address box.
6 Specify the file name that should appear in the document repository.
7 Select the role(s) that will be able to access this document.
8 Select the vaccine type(s) that this document should be associated with.
9 Click the **Save** button to add this document.

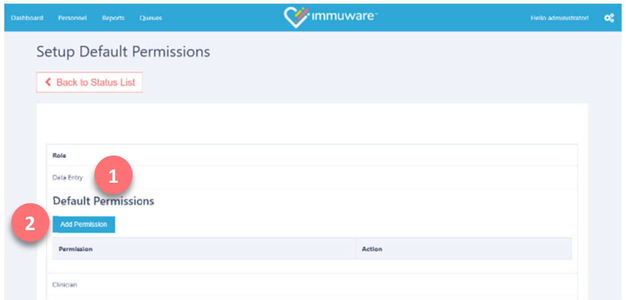

Figure 61

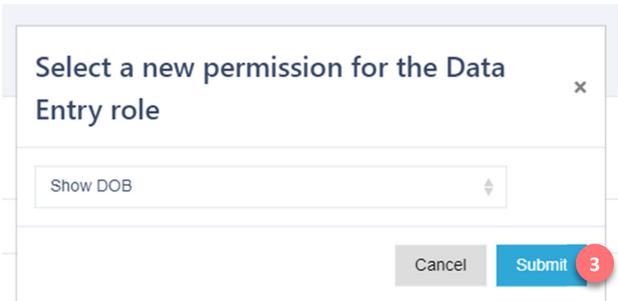

Figure 62

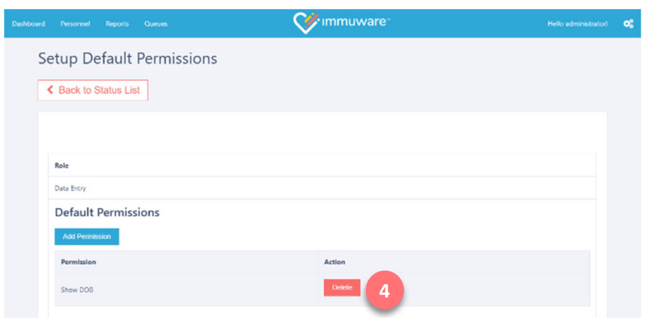

Figure 63

Application Configuration (continued)

Default User Role Permissions

Select the **Default User Role Permissions** menu option from the Immuware™ administrator tools dropdown to access the Setup Default Permissions page [Figure 61]. This tool allows you to specify the permissions that new users will receive by default. For example, if you want all of your new Clinician users to be able to see personnel's date of birth, you can configure this using the Default User Role Permissions tool. Refer to the table on page 29 for explanations of each permission.

Viewing Default Permissions

To view the default permissions that have been assigned to a role, click on the role (1) and the default permissions will appear below it.

Adding Default Permissions

To add a default permission, click on the **Add Permission** button (2) and a pop-up window will appear [Figure 62] where you can select a permission. Click the **Submit** button (3) to add the new permission and verify that it appears in the list of default permissions.

Deleting Default Permissions

To remove a default permission, click on the **Delete** button (4) and a pop-up window will appear that will allow you to delete the default permission.

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 would like to request additional features for your Immuware™ software, please contact your **Immuware™ Account Manager** for more information.

Appendix

Import Personnel Data Fields

Your personnel information can be uploaded manually using the **Import Personnel** menu option from the Immuware™ administrator tools dropdown or it can be automatically imported daily using an integration with your organization's payroll system. For more information on this process, see page 31.

In either case, the data must be supplied in a pipe delimited .txt file (preferred) or a comma delimited .csv file. The first row of each file should be a header row with the field names defined in the order outlined below. Values are required for field names shown in the highlighted cells below.

Field Name	Example	Description
PersonnelTypeId	1	Database key ID of the personnel type (as specified by Immuware™).
PersonnelType Description	Employee	Personnel type name associated with the PersonnelTypeId (as specified by your organization).
PersonnelId	1234	Unique identifier for each employee (as specified by your organization).
FirstName	Jane	Employee first name.
LastName	Doe	Employee last name.
Email	jane.doe@noreply.com	Employee email address. **Required** if you want an Immuware™ workforce user account created for the employee of if you want the employee to receive system generated email notifications.
DoB	01/01/1900	Employee date of birth (MM/DD/YYYY).
Last4SSN	5678	Last four digits of the employee's social security number.
JobTitleId	1	Database key ID of the job title (as specified by your organization).
JobTitleDescription	Registered Nurse	Job title name associated with the JobTitleId (as specified by your organization).
PhoneNumber	1112223333	Employee phone number (10 digits).
FacilityId	1	Database key ID of the facility (as specified by your organization).
Facility	Northwest Emergency Department	Facility name associated with the FacilityId (as specified by your organization).
FacilityShort	NED	Facility acronym associated with the Facility (as specified by your organization).
LocationId	1	Database key ID of the location or department (as specified by your organization). Value may be synonymous with your payroll cost center ID.

Field Name (cont'd)	Example (cont'd)	Description (cont'd)
Location	Nursing Department	Location or department name associated with the LocationId. Value may be synonymous with payroll cost center name.
GroupAffiliationId	1	Database key ID of the group affiliation (as specified by your organization).
GroupAffiliation Description	Nurses Union	Group name associated with the GroupAffiliationId.
LoaStartDate	01/01/1900	Leave of absence start date (MM/DD/YYYY).
LoaEndDate	02/01/1900	Leave of absence end date (MM/DD/YYYY).
SupervisorPersonnelId	1	Creates the organizational relationship between the employee and their supervisor. Value should match the PersonnelId defined for the supervisor employee instance and will trigger the addition of the supervisor user role to the employee's Immuware user account.
HireDate	01/01/1900	Employee hire date (MM/DD/YYYY).
TerminationDate	01/01/1900	Employee termination date (MM/DD/YYYY).
IsActive	1 (Yes) or 0 (No)	Indicates whether or not the employee instance is active.
CreateImmuwareUser	1 (Yes) or 0 (No)	Indicates whether or not the employee receives workforce user access to Immuware.
ImmuwareUsername	janedoe	Employee user name. If left blank, then the value will default to the employee's email.

Sample Email Messages

Emailing Supervisors

With Immuware™, you can send emails to supervisors with a summary of their direct reports' health compliance. You can configure this email summary to include as few or as many record types as you would like and can choose how frequently the emails are sent to supervisors.

To set up an email to supervisors, refer to page 24 of this user reference guide. You can also refer to the sample email message shown in Figure A1 and the steps below show how each component on the Create Email page will appear in the supervisor email message.

- Enter a **Description** that will help you identify this email.
- Choose **Supervisor** from the Email Type dropdown menu.
- Select any **Record Types** that you would like to include in this email report.
- Enter the **Subject** (1) for the email that supervisors will see when they receive the message in their inbox.
- Type the **Body** (2) of the email with a note to supervisors about the employee compliance summary they are receiving.
- Immuware™ will automatically generate a **compliance summary** (3) for each of the record types you selected. This compliance summary will include the number of direct reports, the number that are Compliant for each record type, and the number that are Not Compliant for each record type.
- Below the compliance summary, you can type a **Footer** (4) with instructions for how your supervisors should log into Immuware and who they should contact if they have any issues or questions.
- At the bottom of the screen, you can specify the **Start Date** and **End Date** that this email should be sent as well as the **Time Sent**.
- Use the **Frequency in Days** to specify how often this email should be sent to supervisors during the time frame you have defined.
- The **Is Active** checkbox tells Immuware™ whether this email should be sent to supervisors, if it is just a draft, or if it is no longer relevant or necessary.
- Finally, the **Save** checkbox saves the email that you have created.

1 REMINDER: FLU & TB POLICIES

Dear Supervisor,

2 Our mandatory Influenza vaccination and Tuberculosis surveillance policies are now in effect. As a condition of employment, these policies require all caregivers to receive an annual Influenza vaccination and to complete their Tuberculosis surveillance before December 31.

You have been identified as someone that caregivers report to. A summary of your direct reports' overall compliance is shown below.

3 Influenza Compliance Summary:
Total: 177
Compliant: 120
Not Compliant: 57

Tuberculosis Compliance Summary:
Total: 177
Compliant: 118
Not Compliant: 59

These figures do not include personnel who are on leave of absence.

4 You should have already received an email with instructions for accessing your Immuware supervisor portal at http://immuware-yourdomain.com/, where you can view additional details about your direct reports' compliance. Please refer to the *Immuware User Guide for Supervisors* on our organization's employee intranet to learn more about your Immuware supervisor portal and the important role that you have in employee health compliance.

If you have any questions or have trouble accessing your supervisor portal, please contact the Employee Health Office at ext. 6-7870 or ehs@yourdomain.com.

Thank you for your support.

Figure A1

You can use the **100% Compliant Body** field to inform supervisors when their direct reports have achieved 100% compliance for all record types on this email summary. This email will only be sent after the supervisor's team is 100% Compliant. Once supervisors receive the 100% Compliant message, they will not receive this email again until one of their direct reports is no longer Compliant for one of the record types (Example: a new employee joins their team and is Not Compliant for a selected record type or a current employee's record expires and they are no longer Compliant).

For more information about creating supervisor emails, see page 34 of this user reference guide.

Sample Email Messages

Emailing Employees by Record Type

With Immuware™, you can send emails to employees when they are Not Compliant for certain record types. You can configure this email to include as few or as many record types as you would like and can choose how frequently the emails are sent to employees.

To set up an email to employees, refer to page 25 of this user reference guide. You can also refer to the sample email message shown in Figure A2 and the steps below show how each component on the Create Email page will appear in the employee email message.

- Enter a **Description** that will help you identify this email.
- Choose **Employee** from the Email Type dropdown menu.
- Select any **Record Types** that you would like to include in this email report.
- Enter the **Subject** (1) for the email that employees will see when they receive the message in their inbox.
- Type the **Body** (2) of the email with a note to employees about the compliance report they are receiving.
- Immuware™ will automatically generate a **compliance status report** (3) for each of the record types you selected, showing only the records where an employee is Not Compliant.

1 REMINDER: FLU & TB POLICIES

Dear Employee,

Our mandatory Influenza vaccination and Tuberculosis surveillance policies are now in effect.

2 You have been identified as someone who may interact with patients and as a condition of employment, you are required to receive an annual Influenza vaccination and complete your annual Tuberculosis surveillance before December 31.

3 You are not compliant for the following:
- Influenza
- Tuberculosis

Staff who fail to complete these compliance requirements will be subject to suspension.

If you will receive your Influenza vaccination or Tuberculosis surveillance on-site, please log into your employee portal at http://immuware-yourdomain.com/ and complete your pre-consent form. You should have already received an email with instructions for accessing your Immuware employee portal.

4 If you have already received your Influenza vaccination or completed your Tuberculosis surveillance, you can upload your offsite documentation on your employee portal and it will be reviewed by a member of the Employee Health team.

If you have any questions, please refer to the *Immuware User Guide for Workforce* on our organization's employee intranet or contact the Employee Health Office at ext. 6-7870 or ehs@yourdomain.com.

Thank you for your support.

Figure A2

- Below the compliance status report, you can type a **Footer** (4) with the next steps that the employee should take, including instructions for how your employees should log into Immuware to complete pre-consent forms or to upload offsite documentation.
- At the bottom of the screen, you can specify the **Start Date** and **End Date** that this email should be sent as well as the **Time Sent**.
- Use the **Frequency in Days** to specify how often this email should be sent to employees during the time frame you have defined.
- The **Is Active** checkbox tells Immuware™ whether this email should be sent to employees, if it is just a draft, or if it is no longer relevant or necessary.
- Finally, the **Save** checkbox saves the email that you have created.

This type of email can be very useful for seasonal record types, such as Influenza, where employees have a specific time period to achieve compliance. Early in this time period, you might set the Frequency in Days to 14 to send bi-weekly reminders. As you approach the deadline, you can easily change the Frequency in Days to 7 to send weekly reminders or 1 to send daily reminders.

For more information about creating employee emails by record type, see page 35 of this user reference guide.

Sample Email Messages

Emailing Employees by Record Status Details

With Immuware™, you can send emails to employees when they achieve a certain record status. For example, you might want to send an email reminder to employees who have completed their first MMR vaccination that they need to come receive a second dose.

To set up an Email to Employees by Record Status Details, refer to page 26 of this user reference guide. You can also refer to the sample email message shown in Figure A4 and the steps below show how each component on the Create Email page will appear in the employee email message.

- Enter a **Description** that will help you identify this email.
- Choose **Employee by Record Status Details** from the Email Type dropdown menu.
- Choose the **Record Type** that this email message will be based on.
- Use the **Record Status** and **Record Status Details** dropdown to select the specific record status details that would trigger this email message. In our MMR vaccination example, we would choose "Administered" from the Record Status dropdown and "1st Dose" from the Record Status Details dropdown.
- Enter the **Subject** (1) for the email that employees will see when they receive the message in their inbox.

REMINDER: YOU ARE DUE FOR YOUR 2ND MMR VACCINATION

Dear Employee,

In accordance with (CDC) recommendations, our organization's policy requires all healthcare personnel to have documented evidence of immunity to Measles, Mumps & Rubella (MMR).

As an employee without documented evidence of immunity to MMR, you have begun the vaccination process and have already received your first dose of the MMR vaccine.

You are receiving this email message because it has been 28 days since you received your first dose and you are now eligible to receive your second dose of the MMR vaccine.

Please call ext. 6-7870 to schedule an appointment with the Employee Health Office for the second dose of this vaccine.

If you will receive the second dose of your MMR vaccine from another provider, please log into your employee portal at http://immuware-yourdomain.com/ to provide offsite documentation of your vaccination. You should have already received an email with instructions for accessing your Immuware employee portal.

If you have any questions, please refer to the *Immuware User Guide for Workforce* on our organization's employee intranet or contact the Employee Health Office at ext. 6-7870 or ehs@yourdomain.com.

Thank you for your support.

Figure A3

- Type the **Body** (2) of the email with a message to employees about their record status and the reason they are receiving this email.
- Below body, you can type a **Footer** (3) that tells the employee what to do next. In our MMR vaccination example, we might tell them to call the Employee Health Office to set up an appointment or we could have them log into their employee portal to provide offsite documentation of a vaccination they received from another provider.
- At the bottom of the screen, you can specify the **Time Sent** to determine the specific time that this email should be sent.
- Use the **Remind in Days** to specify how many days the system should wait before sending the email. In our MMR vaccination example, we would enter 28 in this field to tell Immuware™ to wait 28 days from the date an employee completed their first dose.
- The **Is Active** checkbox tells Immuware™ whether this email should be sent to employees, if it is just a draft, or if it is no longer relevant or necessary.
- Finally, the **Save** checkbox saves the email that you have created.

Similarly, you could use the Email to Employee by Record Status Details to communicate upcoming expiration dates.

For more information about creating an Email to Employees by Record Status Details, see page 36 of this user reference guide.

Optional Work Related Incidents Module

INSERT