



USER REFERENCE GUIDE

APPROVERS

VERSION 7.5

Table of Contents

Signing into Immuware™

Self-Registration	3
Single Sign On (SSO).....	4
Standard Authentication.....	5
Forgot Password	5
Changing Your Password	5

Approval Queue

Approval Queue Page	6
Quick Review of Records	7
Detailed Review of Records	8

Additional Support.....	9
-------------------------	---

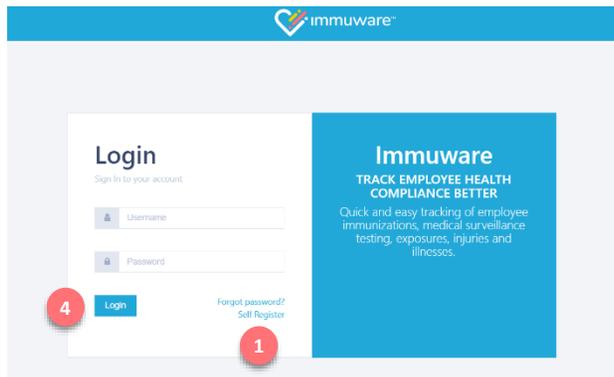


Figure 1

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.

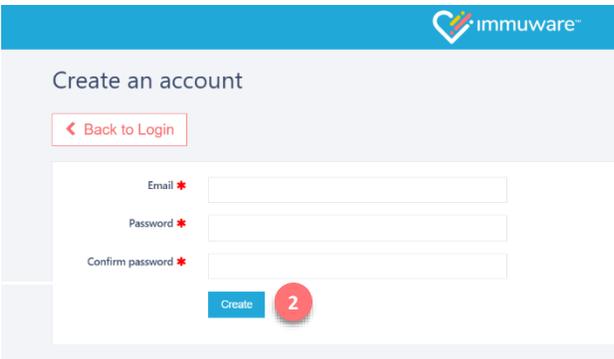


Figure 2

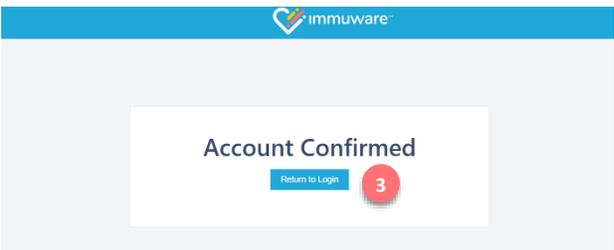


Figure 3

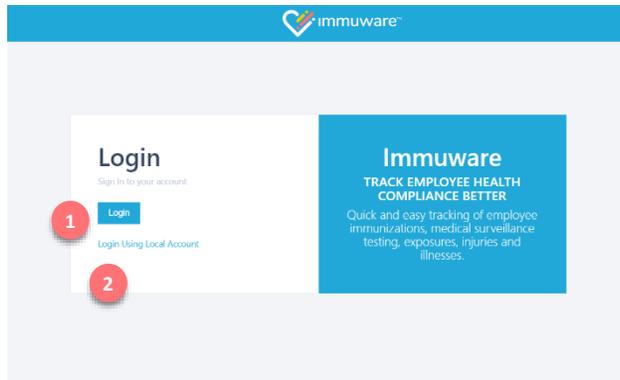


Figure 4

Signing into Immuware™ (continued)

Single Sign-On (SSO)

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

Entering Your Username and Password

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

Login Using Local Account

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

Forgotten Password

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

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].

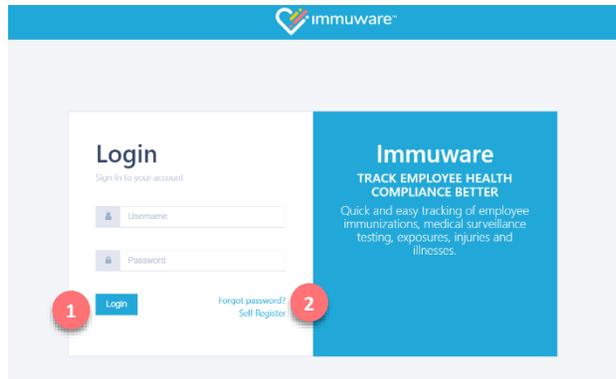


Figure 5

- 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.

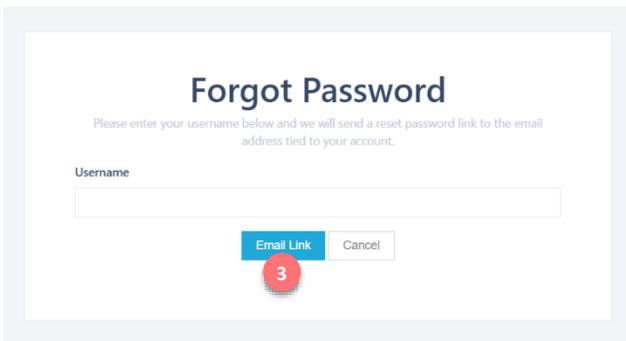


Figure 6

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.

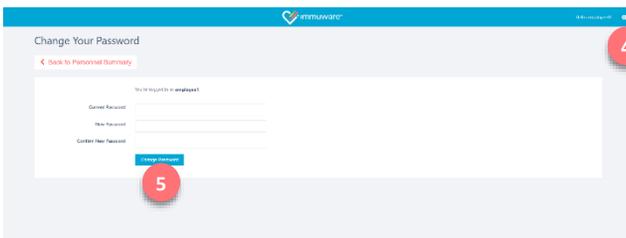


Figure 7

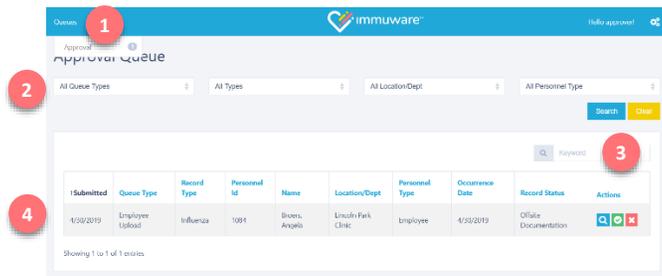


Figure 8

Approval Queue

Approval Queue Page

As an approver, you have access to the Approval Queue [Figure 8]. To access this feature, click on **Queues** from the top left menu (1) and select **Approval**.

When personnel upload documentation through the employee portal or complete questionnaires that require approval, Approvers will receive an email notification that there are records that require review.

The Approval Queue offers a number of filters (2) that allow you to sort the results in the table below. The Keyword search box (3) can also be used to filter the results.

Click any of the blue column headers (4) to sort the results by that column. Clicking anywhere in the row will show you additional information about the record that was submitted for review.

Personnel Type	Occurrence Date	Record Status	Actions
Employee	4/30/2019	Offsite Documentation	

Figure 9

Approval Queue (continued)

Quick Review of Records

When an employee uploads a document for review, you can use the Quick Review feature to quickly review the document and accept or reject the document.

Reviewing the Record

- 1 In the Approval Queue [Figure 9], click on the magnifying glass icon to open the preview window [Figure 10].
- 2 Use the zoom tool to change the magnification on the preview window.
- 3 Click the **Close** button once you are finished reviewing the document.

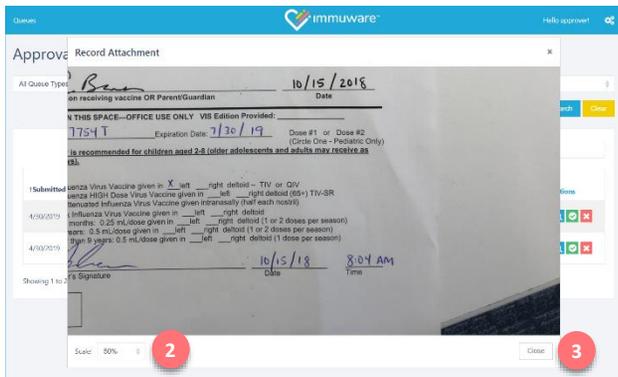


Figure 10

Approving the Record

If the record meets your organization's requirements, click the green checkmark icon (4) on the Approval Queue [Figure 9] to begin approving the record.

- In the Approve Record window [Figure 11], review all of the details for accuracy.
- At the bottom of the window, click the **Approve** button (5) to approve the record.

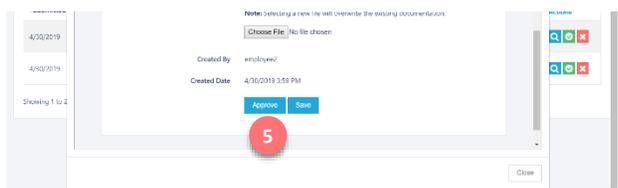


Figure 11

Rejecting the Record

If the record does not meet your organization's requirements, click the red X icon (6) on the Approval Queue [Figure 9] to begin rejecting the record.

- When you reject a record, a pop-up box will appear prompting you for a reason for rejecting the record [Figure 12].
- Enter a reason and then click the **Reject** button (7).
- The record will be rejected and the employee will be notified with the reason that you rejected the record.

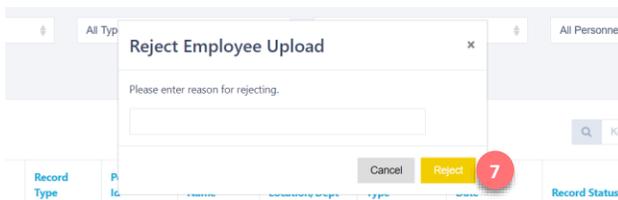


Figure 12

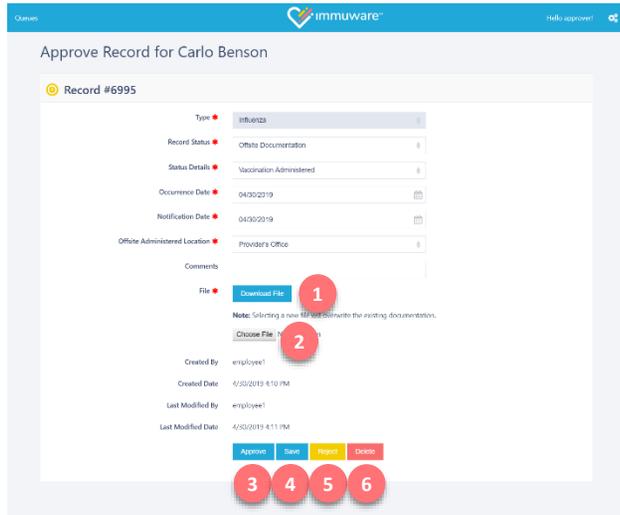


Figure 13

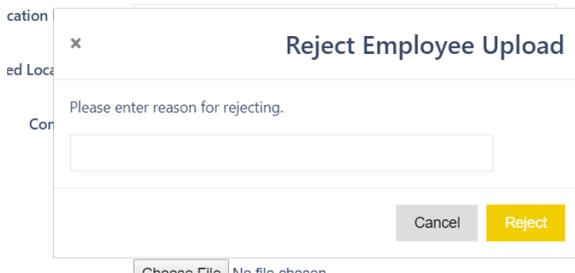


Figure 14

Approval Queue (continued)

Detailed Review of Records

Clicking any item listed in the Approval Queue [Figure 8] will open the Approve Record [Figure 13] page where you can review the information submitted.

- Review the information submitted by the employee.
- 1 Use the **Download File** button to download and view a copy of the file that was submitted, if applicable.
- 2 Use the **Choose File** button to overwrite the file that the personnel uploaded.

At the bottom of the page, there are several options to choose from, depending on your user permissions as an Approver:

- 3 Click on the **Approve** button to accept the record.
- 4 Click on the **Save** button if you have made any changes to the record and wish to save them without approving or rejecting the record.
- 5 Click on the **Reject** button if it does not meet your organization's compliance standards. A pop-up box [Figure 14] will appear where you can communicate the reason that it has been denied. An email will be sent to the employee that their record has been rejected and they can read the reason on their My Profile page.
- 6 Click on the **Delete** button to permanently delete this record. Deleted records cannot be restored.

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.