

QUICK START GUIDE FOR EMPLOYER ADMINISTRATORS







S iHealthHome medikeeper

Welcome to the COVID Navigator Admin Portal!

The Admin Portal empowers you and your company to improve workplace safety, reduce risk for employees, eliminate paperwork and stay compliant with health laws. As the designated 'employer administrator,' you play an essential role in ensuring the safety of your workplace. Before you learn how to use the Admin Portal, be sure your employees are clear on *when* and *how* to use the Navigator app. Likewise, make sure you are knowledgeable about your company's policy for responding to employees who are not cleared for work.

Learning a new system is a process, and ProService is here to support you along the way. For more resources, visit our <u>Navigator Resources & Training</u> site. If you would like consultative guidance on using the Navigator, please contact your ProService representative. If you need technical support with the admin portal, contact the iHealth Support Team at <u>support@ihealthhome.com</u>.

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Section 1: How to Get Started

Login to the admin portal.

- 1. Go to <u>https://covid.ihealthhome.net/</u>. (We recommend you use Google Chrome or Microsoft Edge.)
- 2. Enter the User Name and Temporary Password that was emailed to you' by iHomeHealth.
- Remember, your username and password for the admin portal will **not** be the same as your mobile app username and password. The login for your mobile app identifies you as an individual employee while the admin login lets you access the admin portal to oversee your organization's data.
- 3. Click on 'My Profile' on your Dashboard.

	My Profile	Notifications	Time Clock	
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4. Click 'Change Password' and change the password to one of your choice. Don't forget to write this down for future use.

CHANGE P	ASSWORD	CHANGE PIN
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Explore the admin dashboard.

Once you log in, you will see the Admin Dashboard. The dashboard has 3 key sections: Flags, Case Notes and Tasks.

iHealthHome	Deshboard	Participants	Activity	Admin	Mon Aug 17	🧳 🥖 🙆
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Flags	Case Notes	Tasks
Flags are notifications about an employee's 'not cleared' status that need your attention (ie high temperature, not cleared for work).	This section displays case notes about employees with COVID-related issues. Here you document all actions taken to check-in with your exposed and/or symptomatic employees.	Tasks shows a chronological list of all Participants (employees) who have "Signed and Submitted" their screening questions and related tasks.

Review all your employees (called 'Participants').

1. Click Participants on the top navigation bar to see employees who have registered in the Navigator app.



2. You can search for specific employees by typing a name into the top 'search' field.

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- 3. Click on a Participant's name to view details.
- 4. To make changes, open 'Participant Admin' in the top left corner of the dashboard by double-clicking the double slashes on the bottom right corner.

Note: The system automatically registers employees as male. Go into 'Participant Admin' to change gender.



Set up global alerts and email/text notifications.

Employees trigger a 'Flag' when they record a high temperature or receive a 'Not Cleared' status. To help you manage these, you can set up a Global Alert so that you receive notifications anytime this happens. All flag triggers are then displayed in one place to help you focus on follow-up and document any actions taken.

- 1. Go to the "Admin" section. Under the 'Set Up' tab, select "Global Flag Definition."
- 2. Select 🥯 and complete the 'Flag Definition Section' below.



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3. If you would like to receive a text message or email notification when a Flag is triggered, select 'My Profile' from your dashboard.

DASHBOARD						
 Company Administrator 		angcaon, Dew-Anne	My Profile	Notifications	Time Clock	Schedule

4. Enter the mobile phone number and/or email address to be alerted when a Flag is triggered.

 Company Administrator 		Langcaon, Dew-Anne		My Profile	Notifications
	First Name Dew-Anne		Last Name Langcaon		Address
Phone (Cell)		Phone (Home)		Emall	
555-123-4567				dewanne@il	healthhome.com
Username		Primary Security Ro	le	User Security Re	oles
coadmin.covid		Company Administrator	t	Company Administ	trator
CHANGE PASSWOR	CHA	NCE PIN			
Preferred Communic	ation Method	for Notifications			
Message		Email Text			
Scheduling		Email Text			

5. Under the 'Preferred Communications' section, click the box for text and/or email to indicate how you would like to receive notifications.

Section 2: Top Administrative Actions

Enter case notes.

Use case notes to document every action taken regarding COVID for each Participant. Be sure to document phone calls, emails or any other actions as they occur. Case notes are usually internal messages for your organization that are not shared with the employee or his/her family.

There are 3 ways to create a Case Note:

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- Don't forget to click 'save.'
- You can create an abbreviated note to publish to the employee and his/her family by writing in the "Invoice Note" section.

Review an employee's work status: 'cleared' or 'not cleared.'

To view a Participant's chronological history of their 'Cleared' or 'Not Cleared' badges, click on the 'Work Status' section to view and the clipboard icon for details.

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_		Work Status	Not Cleared	07/29/2020	07/90/2020	07/29/2020 142 PM	
0	Participant muchrica	Work Status	Cleared	07/29/2020	07/29/2020	07/29/2020 11.52 AM	
0	Lob Results	Risk Status	notatrisk	07/06/2020	07/08/2020	12/51/0000 4:00 PM	
	WANK KEANAL						

Override a work status if needed.

You can override an employee's app "Work Status" when needed, such as when an employee is "Cleared" in the morning but later in the day reports feeling ill or when he/she receives new test results.

- 1. Go to 'Participants' and select an employee's name to pull up personal details.
- 2. Click the orange + icon in the right corner.
- 3. Type information into the 'Add New Status' section.

ADD NEW STATUS	
Status •	Work Status - Select this.
Work Status	
atuo • 🖌	Value- Select either Cleared or Not Cleared to change the badge on the Participant's app
Not Cleared *	
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17/2020	 the override to be applicable. (Ex: 14 days following a positive Covid test)
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ments	 for the override (this will appear in all reports)
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	Tip - Add a Case Note about the justification for the override.
CANCEL SAVE	
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View temperature log.

- 1. Go to the 'Participants' dashboard.
- 2. Click on the right corner of the 'Biometrics' section to view the log of temperature readings that employees reported.

View, add and store lab results.

Employee lab results are automatically transferred into the admin portal.

- 1. Go to the 'Participants' tab and select an employee's name to view personal details.
- 2. Select 'Lab Results' from 'Participant Admin' to view results.
- 3. Click the orange + icon to enter a lab result if an employee calls in results instead of using the app.

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Participant Admin						0
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- 4. To store a copy of an employee's lab results, click the 3 dots tab in the employee's dashboard.
- 5. Select the 'plus folder' icon in the upper left corner to create folders for lab result documents.
- 6. Click "Browse" in the bottom right corner to view files on your computer and "Upload" to add them to the folder.

0 ~ × 0	å.		Filter by:
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Note: Documents are for view only storage so use your computer desktop to edit files if needed.

Address flags.

As the Administrator, you will receive Flags for any Participant that triggers the rule in your 'Flags' section, such as when an employee reports a high temperature or receives a 'Not Cleared' status. Flags will also be indicated by the red indicator on the 'Notifications' icon. (See <u>Set Up Global Alerts and Email/Text Notifications</u>.)

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6. Click the right corner of the Flags section to enlarge the window and view all triggered Flags.

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7. Click the "Acknowledge" button to clear the Flag from the list and write a note about any follow-up items you completed. Click 'Update and Document' to automatically log a Case Note in the employee's file

Create reports.

You can use the data in the admin portal to generate a variety of reports:

- Sign and Submit Not Done* a list of employees who did not complete the app for the day
- Tasks By Participant tasks completed and details listed by employee
- Work Status By Participant chronological list of work and risk status by employee
- Cleared Status By Participant cleared status by participant
- 1. Go to 'Admin' on the top navigation and then select the 'Reporting' tab.



2. Select the desired report to create.

Helpful tips:

- To go back to the main list of reports, select "Back to List."
- You can view multiple page reports by clicking the arrows for pages.
- You can filter the report by date, name, status, etc.
 - Select a specific range by calendar date and time.
 - For the same day, you must select the date and set the Start time to 00:00:00 and on the End date, set the time to 23:59:59 or use DAY = today; DAY-1 = yesterday; DAY-2 = 2 days ago, etc.
 - *For the 'Sign and Submit Not Done' report, filter by the date & hour.
- Export any report to Excel, PDF, Word or CSV formats

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Section 3:

Key Policy Recommendations

Your employees will receive one of four risk status notices: not at risk; at risk; positive or pending COVID test result; and negative test result. As the Employer Administrator, you will receive a flag when an employee receives a 'Not cleared' notification. This happens when an employee logs a temperature above the threshold you have established or receives a 'Not Cleared' status. Please see the recommended responses for each status below.

Risk Status	Status Description	Recommended Response
NOT AT RISK	The majority of your employees will receive a status of 'not at risk' meaning that they are likely not at risk for having COVID-19.	No action needed.
AT RISK Not Cleared for Work	This means the employee may be at risk for COVID-19, such as if he/she logs a high temperature, reports other known symptoms or acknowledges that he/she is not practicing social distancing.	Call the employee to ask for more information about his/her symptoms. If you are concerned the employee is sick with COVID symptoms, instruct him/her to stay home and consult his/her health care provider to see if he/she should get a COVID test, or self-monitor at home until symptom-free. Log your call in the Case Notes section and identify follow-up items as needed.
POSITIVE OR PENDING COVID TEST RESULT Not Cleared for Work	The employee either received a positive test result for COVID-19 or is awaiting a test result.	Do not clear your employee for work until he/she has completed the required isolation/quarantine period or has a negative test result. Log your call in the Case Notes section and identify follow-up items as needed.
NEGATIVE COVID TEST RESULT	The employee received a negative COVID test result.	Clear the employee for work if he/she received a negative result and does not not have COVID symptoms or other risk factors.

Section 4: Additional Features

Customize your dashboard.

You can remove unused sections from your dashboard.

- 1. Click on the 'Settings' 🕜 icon.
- 2. Choose "Select Widgets" and turn "Off" any of the sections you would like to remove from your dashboard. You can do this on your 'Participants' dashboard as well as your 'Case Manager' dashboard.
- The settings will be unique to your login and remain the next time you log in. You can change the settings at any time.

Assign a Case Manager.

You can set up administrators to have access to *only* a certain group of employees. This is a more complex setup so please contact your Client Success Partner at ProService for guidance.

Create a Personal Plan for an Employee.

Create a personalized program for employees to document issues, interventions and monitor progress.

- 1. Go to a specific employee's 'Participant' dashboard and click on the "My Plan" tab.
- Click the edit icon *next* to "General Plan Notes."
- 3. In the large text box, type the overview of the employee's situation and overall goals for success.
- 4. In the 'Problems and Interventions' section, click on the + icon to add issues or problems.
- 5. In each 'Problem' section, click + to add Interventions.
- 6. In each 'Intervention' section, click on + to add 'Tasks.'
- 7. To view a preview of the employee's Plan as it is in progress, click "Print."
- 8. In the top left, select the 'Print Template' you want to preview. Choose 'Main' to see more details than the Summary. Click the boxes to filter the content you want to display.
- 9. Once you are satisfied with the Personal Plan, select "Finalize" to acknowledge the Plan on a specific date and get signatures. Click 'None' if no signatures will be obtained.

Add Key Medical Information.

You can add medical information, such as medications, allergies, medical conditions and vital signs to an employee's file.

- 1. To enter a medical condition, select the employee from the 'Participant' dashboard to view his/her details.
- 2. Click the 😌 'Add' icon in the Medical Condition section then click + to enter a condition.
- Click into the text box and start typing a condition. Then click "Search." If a condition is in the database (ie Diabetes), choices will be displayed for you to select the appropriate condition. If a medical condition is not yet in the database, click + to add it manually
- 4. Add any additional information needed and click 'Create.' The condition will be displayed in the list and on the dashboard.
- 5. Click the tab with the Participant's name to return to the dashboard

Note: Follow the above process for allergies and medications.

- 6. To enter vital signs, click on the 'Biometrics' section and enlarge it by clicking on the right lower corner slashes.
- 7. Click + and select the 'Reading Type' for the vital sign you want to record.
- 8. Enter the date and vital sign reading. Click "Save."

Add a new employee contact.

- 1. Double-click on the contacts for the employee in 'Participants'.
- 2. Click the 'Add' icon 😳 and select 'Contact' from the pull down list.
- 3. If the contact is not yet on the list, click + and fill in the form.
- 4. For 'Access Level,' select "no access" and then click 'Save.

Confirm geolocation if used and agreed upon by the employee.

- 1. Go to the 'Admin' section.
- 2. Select the 'Accounting and Payroll' Tab.
- 3. Click 'Clock in List' and view the list of 'Confirmation of Geolocation' actions to compare with the quarantine address.

TAKE CARE & BE SAFE

We hope this guide was helpful! If you would like additional support for you and your team, please visit our COVID Navigator Resources & Training:

proservice.com/navigator-training







