

## COVID Navigator Administrator Quick Start Guide

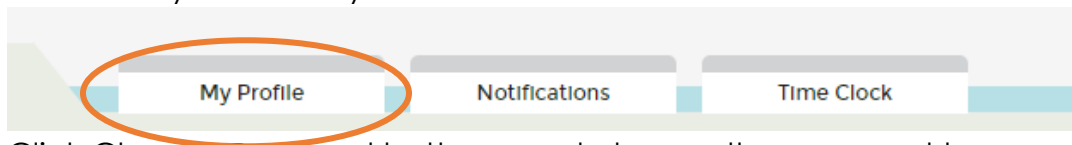
### Getting Started:

To login to the Administrative Portal for Covid Navigator – use Google Chrome or Microsoft Edge as your browser and go to <https://covid.ihealthhome.net/>

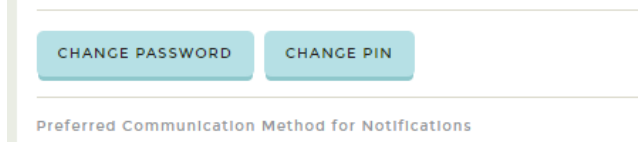
1. Enter the User Name and Password that was emailed to you
2. Note: your admin user name and password will **NOT** be the same as your mobile app username and password as your mobile app identifies you as an individual employee and your personal information vs. the Administrator role allows you access multiple employees and your organization's data
3. You can change your password as below:

### Change your Password:

1. Click on My Profile on your Dashboard

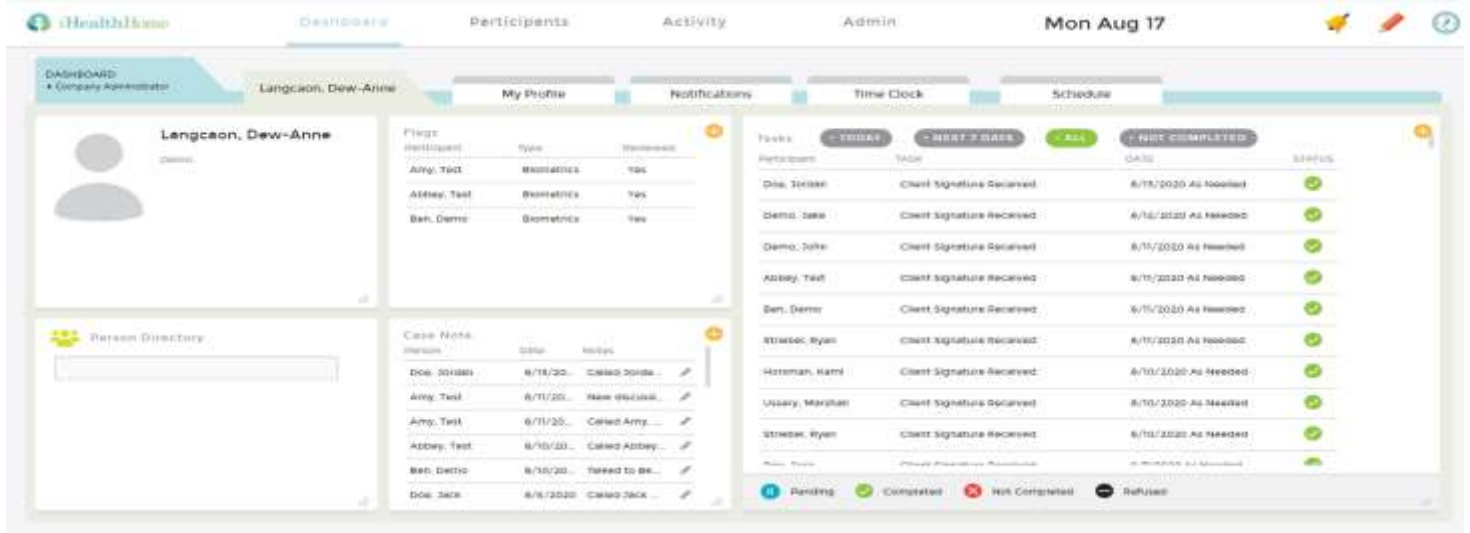


2. Click Change Password button – and change the password to your own personal password.



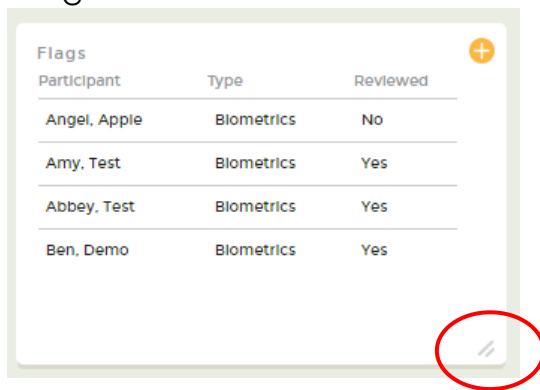
### Admin Dashboard:

Once you log in, you will be brought to your Admin Dashboard with 3 key areas: Flags, Case Notes and Tasks to focus your attention to the exceptions where individuals are “Not Cleared.”



You Admin Dashboard has 3 key sections:

1. **Flags** – these are all the exceptions for your attention
  - a. High Temperature – if a Participant logs a temperature above the threshold you have established. See how to set High Temperature thresholds below.
  - b. Not Cleared status –you will see all employees who have triggered “Not Cleared” as a Flag
  - c. To attend to Flags, click the double slashes in the right corner of the Flags widget.



- d. This will open up your dashboard for all Flags. You can also get to this dashboard by clicking the Activity at the top of the page and selecting the Flabs tab. See Acknowledging Flags section below to attend to a Not Cleared exception.

2. **Case Notes** – the case notes widget will display all case notes about employees with Covid exceptions. This is where all actions taken should be documented. An Administrator can hover over each line to see the documentation written about each case. See Entering a Case Note section below.

3. **Tasks** – the tasks widget will display in chronological order all the “tasks,” namely all the Participants who have “Signed and Submitted” their screening questions and tasks. Clicking the double slash in the right bottom corner of the widget will open to the Tasking Review dashboard. Click “Show all Notes” to see more details.
  - a. To identify which Participants did not take their survey that day – go to Reports and run the “Sign and Submit Not Done Report”

**Review Entire Participant List:** All registered users on the app will appear in the Participant List

1. Click Participants on the top navigation bar



2. A list of all registered users for the sponsor appears
3. Top line is a filter bar to help you search or sort to search for Participants



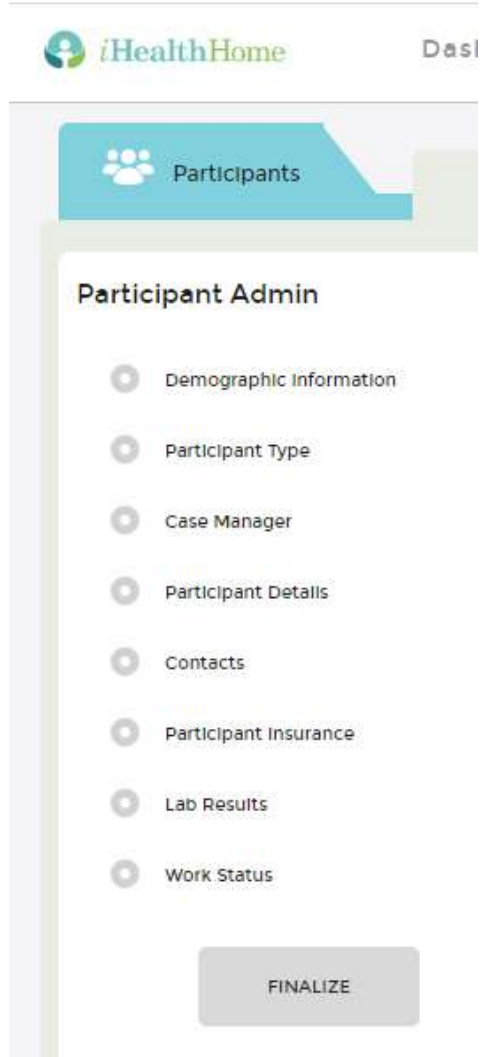
NAME	CLIENT #	TYPE	GENDER	MRN	PREFERRED #	DOB (AGE)	ADDRESS
Dema Simple1	20-06-00000479	Registered	Male			06/06/2000 (20)	Delete
Test Simple2	20-06-00000505	Registered	Male			08/10/2000 (20)	Delete
Test Simple3	20-06-00000506	Registered	Male			08/10/1990 (30)	Delete

**Select a Participant:** Click on a Participant's name to open the Participant's dashboard.

NOTE: Gender will be Male when first Registered for all participants. Go into the Participant Admin Widget below and change to Female as needed.

**Participant Admin Widget:** Participant demographics such as name, address, phone number, email address, status will be populated from the App to iHealthHome and be displayed in the Participant Admin Widget. Open the Participant Admin widget in the top left corner of the dashboard with the picture by double clicking the double slashes on the bottom right corner of the widget.

**Participant Admin Subforms:** Subforms are sub-sections of information about each Participant.



Demographic Information – Name, address, email, etc. is transferred from the App

Participant Type – represents the current Risk Type of the participant and changes as symptoms are retaken or test results updated

Case Managers – assignment of a case manager to manage any Not Cleared for Work statuses – could be a supervisor, Covid coordinator, or HR personnel.

Participant Details – other information about the Participant

Contacts – allows logging of recent contacts of the Participant

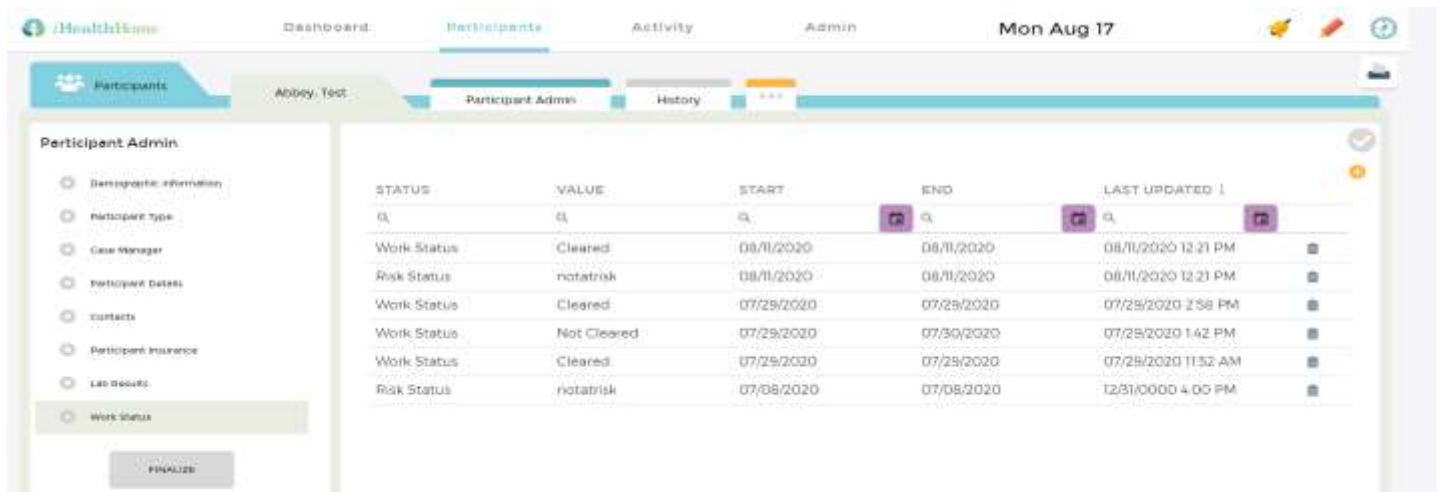
Participant Insurance – tracks insurance information

Lab Results – track lab results entered on the mobile app or can be added from the Admin portal

Work Status – View the current Work Status of a Participant as well as the chronological history of all prior Work Statuses. In this section, a Work Status can also be overridden by an Administrator if appropriate.

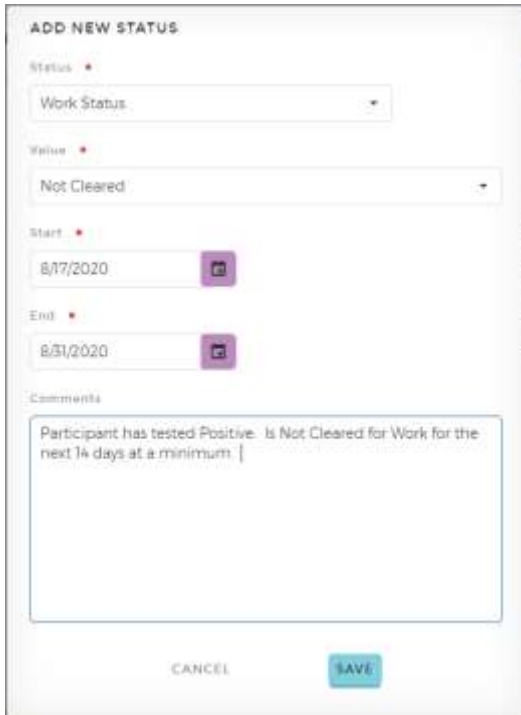
### Work Status – “Cleared” or “Not Cleared” status

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



**Overriding a Work Status:**

1. An Administrator can override the “Work Status” badge that is displayed on the Participant’s mobile phone in certain circumstances. For example, if a Participant is “Cleared” in the morning, but later in the day reports feeling ill, or has test results that no make the Participant “Not Cleared.”
2. Click the orange plus sign in the right corner.



**Select Work Status**

Select – either Cleared or Not Cleared – this will change the badge on the Participant’s mobile phone

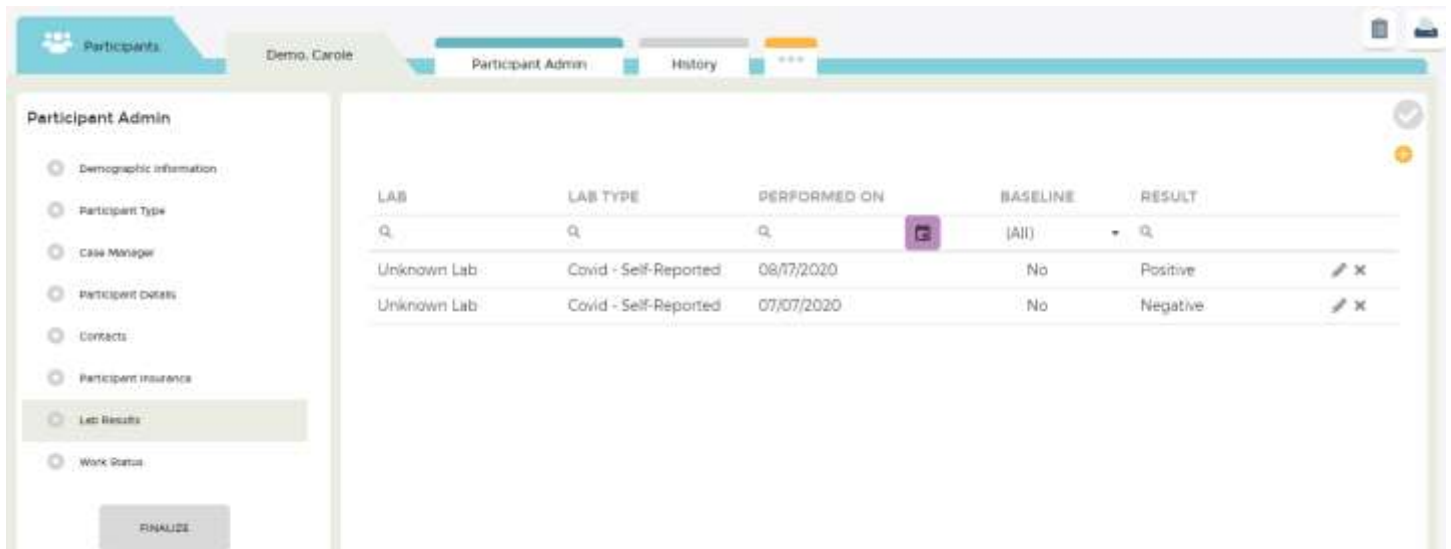
Date – you can enter any range of dates for the override to be applicable – just one day or a range of dates. For example: for 14 days following a positive Covid test.

Enter Comments as to why the override was authorized. Comments will appear in all reports.

Helpful Tip: Add a Case Note as well about the justification for override. After 9/8/2020 you will have the option to copy the override comment into a Case Note automatically

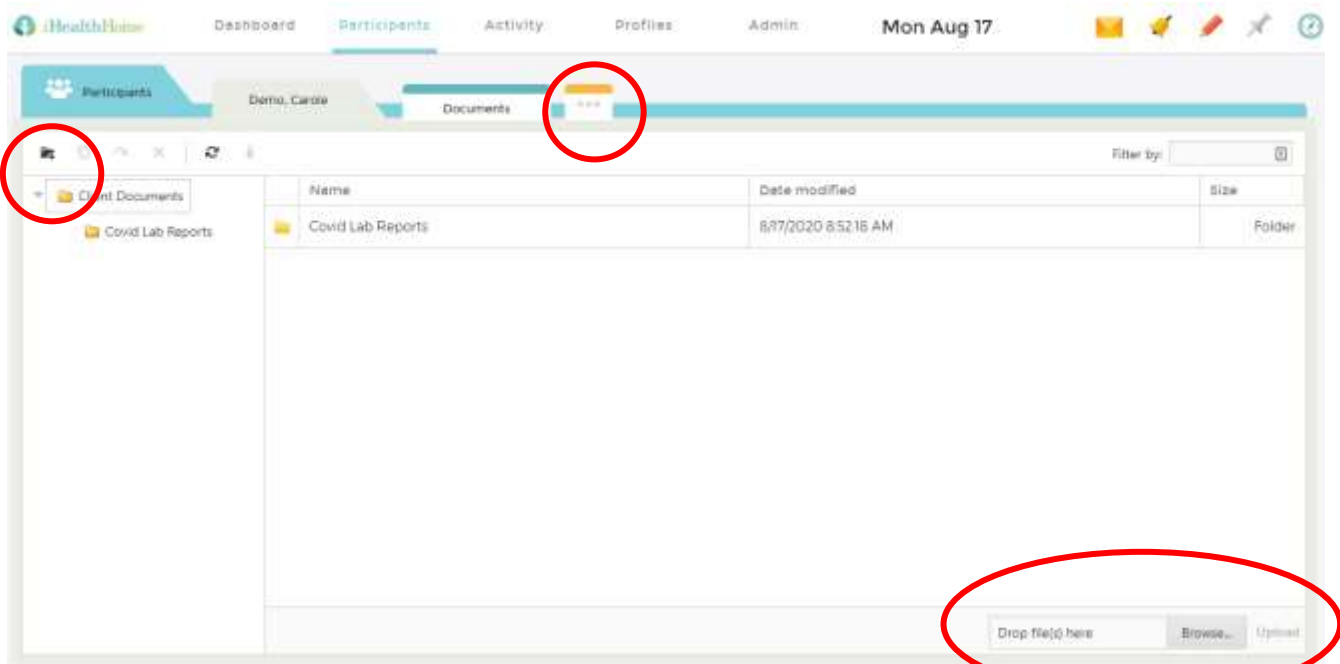
**Lab Results**

When a participant enters a lab result from the mobile app – the results will automatically be entered into the Lab Results Subform for viewing and a Positive result will automatically result in a Not Cleared Status. Click the orange plus to enter a lab result called in by a Participant.




LAB	LAB TYPE	PERFORMED ON	BASLINE	RESULT
Unknown Lab	Covid - Self-Reported	08/17/2020	No	Positive
Unknown Lab	Covid - Self-Reported	07/07/2020	No	Negative

If you would like to store lab reports sent to you by the employee as proof of positive or negative results – click the 3 dots ... tab and open “Documents”. Create folders as desired in the upper left corner; click “Browse” to view files on your computer and “Upload” to upload them to the Participant’s chart.



Note: documents are for view only storage – edit documents on your desktop and then reupload a new version for changes

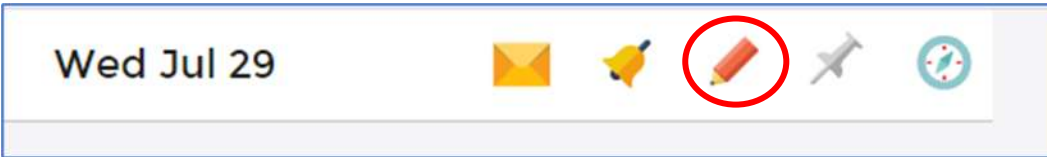
**Enter a Case Note:** The most commonly used function of the system is the note taking function or “Case Note”. Use it to document every action taken regarding Covid for each Participant as it arises. Whether it be a phone call, email or other action with the Participant about a Covid related interaction.

1. Go to the Case Note widget, click 
2. Select the Participant the note is about – if you were in the Participant's dashboard it will be pre-populated for you
3. Enter the Date
4. Enter the Note in the big box in as much detail as you like (this is generally a private note for your agency, not shared with the Participant or family)
5. Enter an abbreviated note in the “Invoice Note” box – this note is a published note shared with Participant and family and inserted on invoices
6. Click “Save”

There are 3 ways to create a Case Note:



From the Orange Plus sign on a Participant's Dashboard



From the Red Pencil on the right of every screen



From the Orange Plus sign in the Activity Tab


**View Temperature Log:**

1. Go to Participant dashboard
2. Click on right corner of Biometrics widget to expand
3. View log of temperature readings reported

**Global Alerts**

Global Alerts make it easy for an Administrator to receive a text message or email when a Participant triggers a Flag such as a high temperature reading or a "Not Cleared" status. All flag triggers are then displayed on a single dashboard to focus follow up and document actions taken.

**How to set up a Global Alert:**

An Administrator can navigate to the "Admin" section and under the Set Up tab, select "Global Flag Definition." Select  and follow the flag definition wizard below.



Name: enter the name of the flag

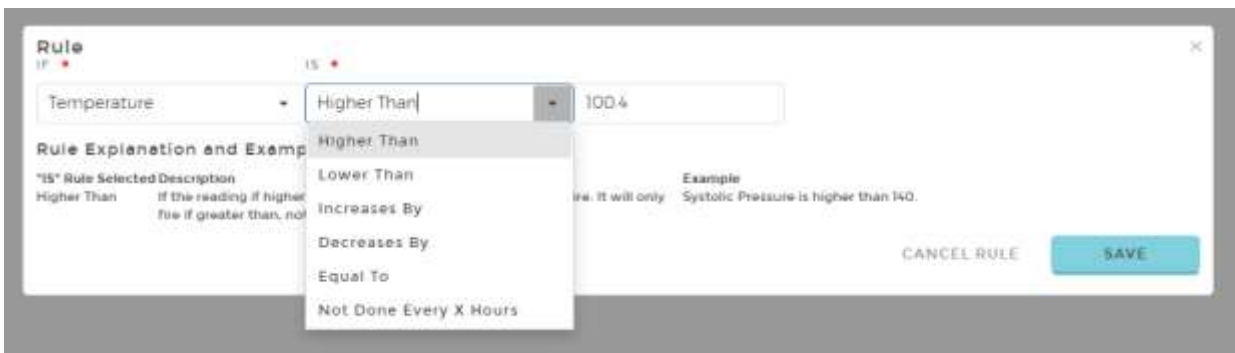
Send to: click in the box and a list of eligible recipients of the alert will pop up. Select one or more authorized users to receive the flag notification.

Select the Type of Flag:

Biometric = use for temperature

Person Status = use for Not Cleared status

Rules: select  to create the rule

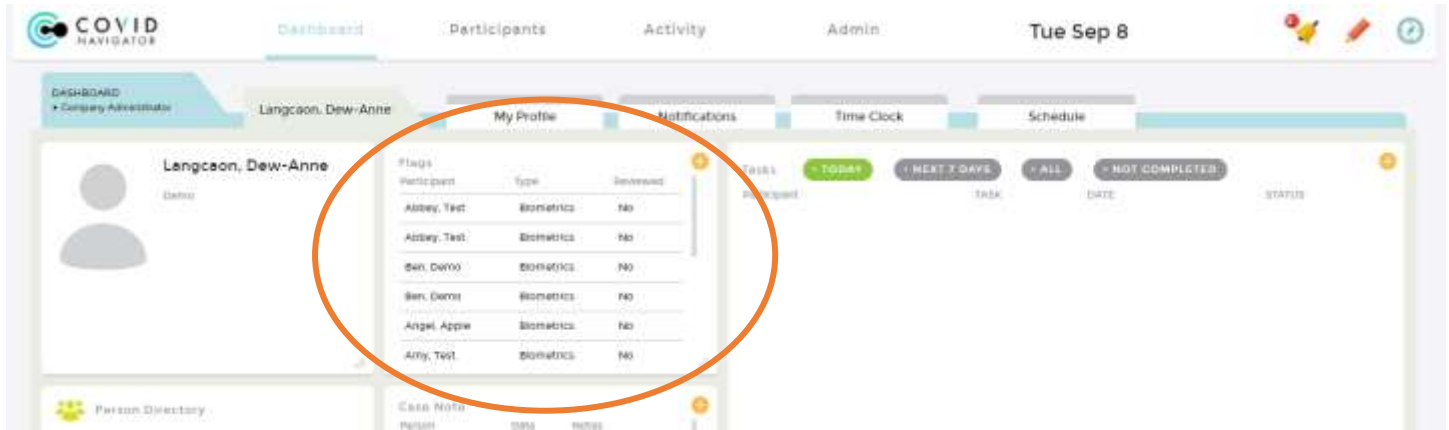



### Receiving a Global Alert:

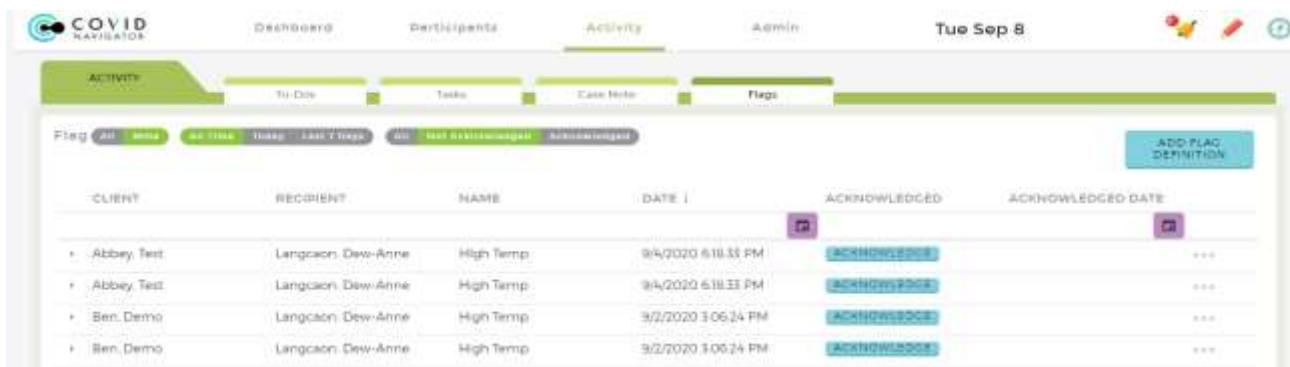
The designated Company Administrator will receive Flags for any Participant that triggers the rule in their Flags widget and via the red circle indicator on the Notifications icon.



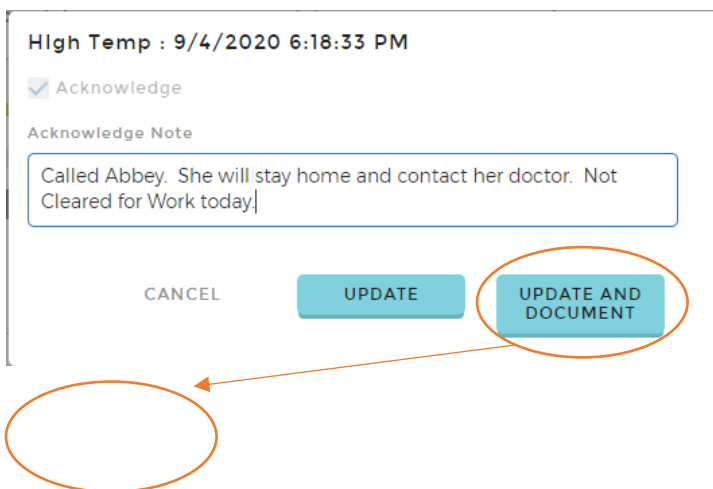




Click the right corner of the Flags widget to enlarge the window and view all triggered Flags.



Click the "Acknowledge" button to clear the Flag from the list and write a note about follow up done. Hit "Update and Document" to automatically log a Case Note in the Participant's file.



**CASE NOTE - NEW**

Participant: Abbey, Test

Date: 9/4/2020

Service Type: Select...

Type: Phone Call

Notes: Called Abbey. She will stay home and contact her doctor. Not Cleared for Work today.

Participants: Abbey, Test

My Plan | Biometrics | Contacts

**Abbey, Test**  
Agency: Genco  
Additional Contact: 613-466-8292  
Emergency Contact: 47 07/07/1973  
Client Type: Negative  
ID: 20-07-0000268

BIOMETRICS:			
Date	Type	Value	
09/04/2020 06:18 PM	Temperature	102	
09/01/2020 09:09 AM	Temperature	98	
09/11/2020 12:20 PM	Temperature	98	
08/10/2020 09:17 AM	Temperature	101	
07/29/2020 02:20 PM	Temperature	99.2	

Case Note Author	Date	Case Note
Langcaon, Dew-Anne	9/4/2020	Called Abbey. She will stay home and contact her doctor. Not Clea...
Langcaon, Dew-Anne	8/20/2020	Called Abbey. She will stay home today and ask her doctor to send...
Langcaon, Dew-Anne	7/23/2020	Abbey called to report that her test results came back Negative as...
Langcaon, Dew-Anne	7/28/2020	Abbey left a voice message that she want for her covid test - pendt...
Langcaon, Dew-Anne	7/23/2020	Abbey called to report that a member of her household went for a CO...

**Setting up a Text Message or Email Notification:**

The Company Administrator who would like to receive the text message or email can select "My Profile" from their dashboard.



Enter the mobile phone number and/or email address to be alerted when a Flag is triggered. Under the Preferred Communications Section, click the box for text or email or both to indicate how you would like to receive the Notification.

Click the Notifications tab as another way to view all Flags received.

DASHBOARD  
Company Administrator

Langcaon, Dew-Anne

My Profile

Notifications

First Name: Dew-Anne

Last Name: Langcaon

Address:

Phone (Cell): 555-123-4567

Phone (Home):

Email: dewanne@ihealthhome.com

Username: coadmin.covid

Primary Security Role: Company Administrator

User Security Roles: Company Administrator


CHANGE PASSWORD

CHANGE PIN

Preferred Communication Method for Notifications

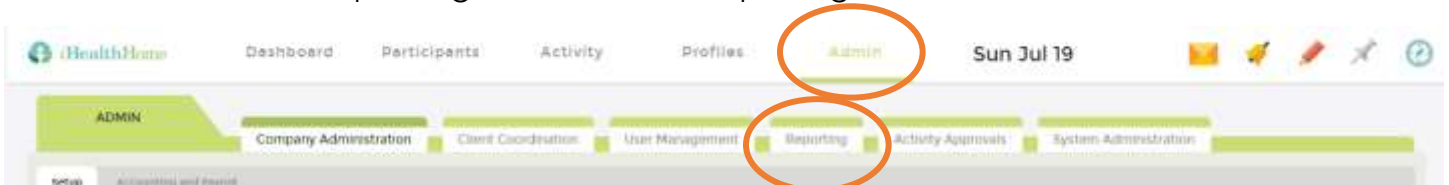
To-Do	<input type="checkbox"/> Email	<input type="checkbox"/> Text
Message	<input type="checkbox"/> Email	<input type="checkbox"/> Text
Scheduling	<input type="checkbox"/> Email	<input type="checkbox"/> Text
Flag	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Text

### **Customize Dashboards:**

To remove unused widgets from your dash board, on the right side of the top navigation bar, click on the Settings icon ; choose “select widgets” and turn “off” any of the widgets you would like to eliminate from view on your dashboard. You can do this on your Case Manager dashboard as well as on Participant dashboards. The settings will be unique to your login and remain the next time you log in. The settings can be changed at any time.

### **REPORTS:**

Go to Admin on the top navigation then the Reporting tab.



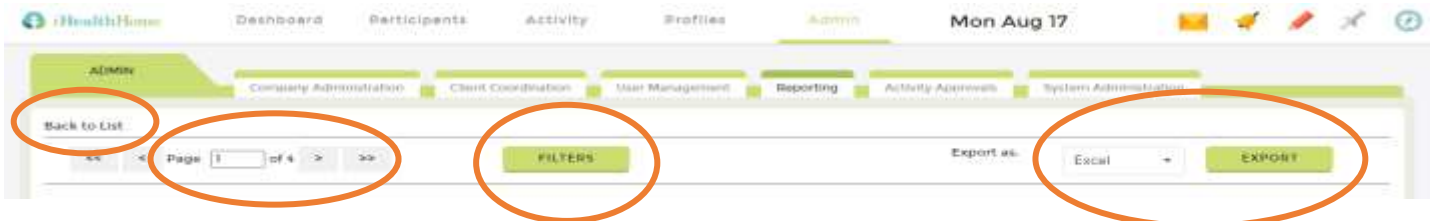
Select the desired report.

Click the report name to run it. For any report:

1. “Back to List” takes you back to the list of reports
2. View reports that have multiple pages by clicking the arrows for pages
3. Filter the report by date, names, status, etc.

- a. Select a specific range by calendar date and time – note 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
- b. DAY = today; DAY-1 = yesterday; DAY-2 = 2 days ago, etc.

4. Export any report to Excel, PDF, Word or CSV formats



**Sign and Submit Not Done Report** – generates a list of all Registered Users who did NOT complete the app for the day.



The screenshot shows a table titled 'Sign-Submit Not Done Report'. The table has three columns: 'Name', 'Cell Phone', and 'Email'. Below the table, there are fields for 'Start Date' (1/22/20) and 'Time Zone' (Pacific Standard Time).

Name	Cell Phone	Email
Abbey, Test	123-456-0390	Abbey@me.com
Aina, Diana	876-123-4567	Aina@me.com
Amy, Test	555-123-4567	Amy@me.com
Anger, Apple	555-789-4561	anger@me.com
Another, Test	856-123-4567	Another@me.com
Bart, Diana	876-123-5678	Bart@me.com
Bird, Amanda	567-456-3356	Amanda@demo.com
Bloom, Das	2345789105	oimkeepertest-dao@gmail.com
Boos, Betty	425-789-0089	Betty@demo.com
Brown, Alex	8769000000	Alexis@gmail.com
Brown, Diana	134-678-9990	Diana@tania.com
D, D	5555566666	Demo@demo.com
Demo, Alan	555-123-3456	Alan@me.com
Demo, Carisa	555-123-3456	Carisa@me.com
Demo, Dams	9495552164	Demo@demo.com
Demo, Jordan	9495552164	Jordan@demo.com
Demo, Jordan	555555555	Demo@medkeeper.com
Demo, Kay	555-123-4567	Kay@me.com
Demo, Kevin	2223334444	fnh@ovidnas.com
Demo, Your Name	2222222	demodemo@fnh.com

Start Date: 1/22/20      Time Zone: Pacific Standard Time

**Tasks by Participant Report** – lists by employee all the tasks completed and date, time and signature.

ADMIN

Company Administration Client Coordination User Management

Back to List

<< < Page 1 of 6 > >> FILTERS

[Redacted]					Not at Risk
Tasks					
Date	Title	Status	Completed On	Signature	
7/7/20	Client Signature Received	Complete	7/7/20 9:00 AM	[Signature]	
7/8/20	Client Signature Received	Complete	7/8/20 9:30 AM	[Signature]	
7/9/20	Client Signature Received	Complete	7/9/20 7:28 AM	[Signature]	
7/9/20	Client Signature Received	Complete	7/9/20 7:55 AM	[Signature]	
7/10/20	Client Signature Received	Complete	7/10/20 7:21 AM	[Signature]	
7/13/20	Client Signature Received	Complete	7/13/20 9:54 AM	[Signature]	
7/14/20	Client Signature Received	Complete	7/14/20 3:56 AM	[Signature]	
7/15/20	Client Signature Received	Complete	7/15/20 1:02 PM	[Signature]	
7/16/20	Client Signature Received	Complete	7/16/20 7:58 AM	[Signature]	
7/17/20	Client Signature Received	Complete	7/17/20 10:43 AM	[Signature]	
7/20/20	Client Signature Received	Complete	7/20/20 11:15 AM	[Signature]	
7/21/20	Client Signature Received	Complete	7/21/20 2:47 PM	[Signature]	

[Redacted]					Not at Risk
Tasks					
Date	Title	Status	Completed On	Signature	
7/8/20	Client Signature Received	Complete	7/8/20 10:06 AM	[Signature]	
7/7/20	Client Signature Received	Complete	7/7/20 9:05 AM	[Signature]	
7/7/20	Client Signature Received	Complete	7/7/20 9:17 PM	[Signature]	
7/8/20	Client Signature Received	Complete	7/8/20 9:40 AM	[Signature]	
7/9/20	Client Signature Received	Complete	7/9/20 9:22 AM	[Signature]	
7/13/20	Client Signature Received	Complete	7/13/20 9:48 AM	[Signature]	
7/14/20	Client Signature Received	Complete	7/14/20 9:26 AM	[Signature]	
7/15/20	Client Signature Received	Complete	7/15/20 11:41 AM	[Signature]	
7/15/20	Client Signature Received	Complete	7/15/20 9:38 AM	[Signature]	
7/17/20	Client Signature Received	Complete	7/17/20 9:07 AM	[Signature]	
7/18/20	Client Signature Received	Complete	7/18/20 5:46 PM	[Signature]	



Work Status by Participant Report – displays by participant the chronological list of their work and risk statuses.

Work Status by Participant

Status Name	Status Value	Start Date	End Date	Is Manual	Comments	Created On
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 9:04:51 AM
Risk Status	notatrk	7/22/20	7/22/20	No		Jul 22, 2020 9:04:20 AM
Risk Status	notatrk	7/22/20	7/22/20	No		Jul 22, 2020 9:02:44 AM
Work Status	Cleared	7/21/20	7/21/20	No		Jul 21, 2020 12:43:14 PM
Risk Status	notatrk	7/21/20	7/21/20	No		Jul 21, 2020 12:42:59 PM
Work Status	Cleared	7/20/20	7/20/20	No		Jul 20, 2020 9:58:28 AM
Risk Status	notatrk	7/20/20	7/20/20	No		Jul 20, 2020 9:56:11 AM
Risk Status	notatrk	7/17/20	7/17/20	No		Jul 17, 2020 9:17:11 AM
Risk Status	notatrk	7/16/20	7/16/20	No		Jul 16, 2020 9:51:38 AM
Risk Status	notatrk	7/15/20	7/15/20	No		Jul 15, 2020 2:06:24 PM
Risk Status	notatrk	7/14/20	7/14/20	No		Jul 14, 2020 9:42:45 AM
Risk Status	notatrk	7/13/20	7/13/20	No		Jul 13, 2020 12:51:04 PM
Risk Status	notatrk	7/10/20	7/10/20	No		Jul 10, 2020 9:48:09 AM
Risk Status	notatrk	7/9/20	7/9/20	No		Jul 9, 2020 12:34:17 PM
Risk Status	notatrk	7/8/20	7/8/20	No		Jul 8, 2020 10:29:05 AM
Risk Status	notatrk	7/7/20	7/7/20	No		Jul 7, 2020 9:35:32 AM
Risk Status	notatrk	7/6/20	7/6/20	No		Jul 6, 2020 12:00:13 PM
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 3:04:48 PM
Risk Status	notatrk	7/22/20	7/22/20	No		Jul 22, 2020 3:04:39 PM
Work Status	Cleared	7/21/20	7/21/20	No		Jul 21, 2020 7:32:08 AM
Risk Status	notatrk	7/21/20	7/21/20	No		Jul 21, 2020 7:31:46 AM
Work Status	Cleared	7/20/20	7/20/20	No		Jul 20, 2020 9:38:43 AM
Risk Status	notatrk	7/20/20	7/20/20	No		Jul 20, 2020 9:38:36 AM

Cleared Status by Participant Report – displays the cleared/not cleared status by Participant by date. Any notes entered to override a status will be displayed.


Work Status by Participant

Status Name	Status Value	Start Date	End Date	Is Manual	Comments	Created On
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 9:04:51 AM
Work Status	Cleared	7/21/20	7/21/20	No		Jul 21, 2020 12:43:14 PM
Work Status	Cleared	7/20/20	7/20/20	No		Jul 20, 2020 9:58:28 AM
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 3:04:48 PM
Work Status	Cleared	7/21/20	7/21/20	No		Jul 21, 2020 7:32:08 AM
Work Status	Cleared	7/20/20	7/20/20	No		Jul 20, 2020 9:38:43 AM
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 4:12:50 PM
Work Status	Cleared	7/21/20	7/21/20	No		Jul 21, 2020 7:07:04 AM
Work Status	Cleared	7/20/20	7/20/20	No		Jul 20, 2020 7:11:09 AM
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 2:48:59 PM
Work Status	Cleared	7/21/20	7/21/20	No		Jul 21, 2020 12:00:40 PM
Work Status	Cleared	7/20/20	7/20/20	No		Jul 20, 2020 9:52:17 AM
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 4:04:49 PM
Work Status	Not Cleared	7/22/20	7/29/20	Yes	Not Cleared to work in the office only work from home per company policy.	Jul 22, 2020 3:50:01 PM
Work Status	Cleared	7/22/20	7/22/20	Yes	Member of household is under quarantine due to recent travel to the mainland. Quarantine ends on Saturday 7/25/20.	Jul 22, 2020 3:03:03 PM
Work Status	Not Cleared	7/21/20	7/21/20	No		Jul 21, 2020 10:57:43 AM
Work Status	Not Cleared	7/20/20	7/20/20	No		Jul 20, 2020 10:07:03 AM





### **ADDITIONAL OPTIONAL FEATURES:**

The following are additional features available to Administrators of Covid Navigator if applicable.

#### **Assigning a Case Manager (optional):**




1. A Case Manager could be a Supervisor or a Covid Coordinator
  - a. Whomever is assigned to follow up on any “Not Cleared for Work Status”
  - b. When assigning a supervisor as a Case Manager, that Supervisor can be given admin access to Covid Navigator and they will only see the employees they have been assigned
2. Double click on the Case Manager subform in the Participant Admin form
3. Click the Add button 
4. Select the Case Manager from the pull-down list
5. This will assign the Case Manager and allow the Case Manager access to this Participant's information
6. To add Case Manager's to the pull-down list, please contact Customer Support at iHealthHome via email at [support@ihealthhome.com](mailto:support@ihealthhome.com)

#### **Create a Personal Plan:**

1. From the Participant's dashboard – click “My Plan” tab
2. Click on edit icon  next to “General Plan Notes” label
  - a. Type the Participant's overview story in the big text box and overall goals
  - b. In the Problems and Interventions section, click on the add button  to add Problems
  - c. Then in each problem section click the add button  to add Interventions
  - d. Then in each intervention section click the add button  to add Tasks
    - i. NOTE: we will not be using “ToDos” at this time
3. Any misc Tasks created from the dashboard will show up as Miscellaneous not attached to an Intervention
4. View a preview of the Plan every so often – click “Print”
  - a. In the top left select the “Print Template” you desire to preview
    - i. Main – shows more details than Summary
    - ii. Click the boxes for the content you want to display – this helps filter what information will be displayed in the print out
  - b. Print preview is a good way to visualize the plan as it is “in Progress”
  - c. Once you are satisfied with your Plan, then
5. Click “Finalize” to memorialize the Plan on a particular date and get signatures
  - a. Click None button – as no signatures will be obtained





**Enter Key Medical Information:** Enter Medications, Allergies, Medical Conditions and Vital Signs

1. Enter a Medical Condition



- a. Click the  in the Medical Condition widget
- b. Since this is a new Participant, nothing is displayed – click on the  to enter a condition
- c. Click into the text box and start typing a condition and click “Search”
  - i. If a condition is in the database (eg. Diabetes) , choices will be displayed
  - ii. Select the condition
  - iii. Fill in any pertinent information you have and hit “Create” button
  - iv. Condition will be displayed in the list and on the dashboard
  - v. Click the tab with the Participant's name to get back to the dashboard
- d. If a medical condition is NOT yet in the database, click  to add it manually

2. Enter an Allergy – same process as above

3. Enter a Medication:

- a. When you want to open a widget to be bigger, click on the hash marks on the right corner of the widget 
- b. Since this is a new Participant, nothing is displayed – click on the  to Assign a Medication
  - i. Click in the text box, wait a second, and a list of the medications in the database will appear – select the appropriate med
  - ii. Enter all required fields with the red dot 
  - iii. Enter dosage (ie. 1 tablet, 1 inhalation, etc)
    1. If dose is to be given at a particular time – check the Dosage Times box
    2. If time doesn't matter, uncheck the box and select the daily frequency
  - iv. Scroll down completing as many boxes as you have information for
  - v. Hit “Save” button to add to the Participant's med list
- c. If the medication is not in the company database, then click  to create a medication to be added to the database

4. Manually enter vital signs using the Biometrics widget



- a. Enlarge the biometrics widget by clicking on the right lower corner 
- b. Click 
- c. Select the reading type
- d. Enter the date, reading and hit “Save”





- e. When Bluetooth devices are placed in the home, readings are automatically taken and transmitted to the system via the cloud (call your sales rep for more information)

**Enter a Contact:**

1. Double Click on the Contacts Subform
2. Click the Add Button 
3. Select the Contact from the pull down list
4. If Contact is not yet on the list, click  and fill in the form
5. For Access Level – select “no access”
6. Hit Save

**Confirmation of Geolocation (if used and consented by the Participant):**

1. Go to Admin
2. Go to Accounting and Payroll Tab
3. Go to Clock in List
4. View list of Confirmation of Geolocation actions and comparison to quarantine address