



## Quick Guide to Reports

July 2020

# Reports and Activity Tab

- Reports and the Activity Tab are a great way to keep track of all the COVID related activities need to document and archive
- Log all screening activities for every participant – tracks the majority of employees that are “Cleared for Work” with little effort
- Oversee, manage and document all activities related to following up on any COVID related exposures, tests results, etc. that may result in employees being At Risk or Not Cleared for Work
- Supervisors can be given access to only their employees to monitor daily and document COVID activities in one place
- Executives and HR to access At a Glance reports and views of all COVID related activities in their organization

# Activity Tab

One of the quickest way to see At a Glance - all Covid-related activity in the organization is the Activity Tab.

Case Notes are used to document any Covid-Related activity for each participant (see next slide for how to enter Case Notes)

- Click on “Case Note” tab
- Select a timeframe
- Click “Show all Notes” – to see all Covid related notes made in your organization

The screenshot shows the iHealthHome interface. The top navigation bar includes 'Dashboard', 'Participants', 'Activity' (circled in red with a '1'), 'Profiles', and 'Admin'. The date 'Wed Jul 29' is displayed on the right. Below the navigation bar, there are tabs for 'ACTIVITY', 'To-Dos', 'Tasks', 'Case Note' (circled in red with a '2'), and 'Flags'. Under the 'Case Note' tab, there are filters: 'All Time' (circled in red with a '3'), 'Today', and 'Last 7 Days'. A 'Show All Notes' button (circled in red with a '4') is also present. A 'Total Count' box shows '13'. The main content area displays a table of case notes with columns: PERSON, DATE, CLIENT TYPE, ENTERED BY, and TASK TYPE. The table contains four rows of data, each with a 'Notes' section below it.

PERSON	DATE	CLIENT TYPE	ENTERED BY	TASK TYPE
<a href="#">Abbey_Test</a>	07/29/2020	Not at Risk	Langcaon, Dew-Anne	Phone Call
<b>Notes</b> Called employee. Not cleared for work until HK results.				
<a href="#">Abbey_Test</a>	07/29/2020	Not at Risk	Langcaon, Dew-Anne	Phone Call
<b>Notes</b> Abbey called today - not cleared. Discussed. Is cleared to work.				
<a href="#">Ben_Demo</a>	07/21/2020	Positive	Langcaon, Dew-Anne	Phone Call
<b>Notes</b> Not coming to work.				
<a href="#">Amy_Test</a>	07/21/2020	Positive	Langcaon, Dew-Anne	Email
<b>Notes</b> checked in with Amy. Still doing well				
<a href="#">Amy_Test</a>	07/21/2020	Positive	Langcaon, Dew-Anne	Phone Call

**A Case Note is used to document a running log of Covid related activities for a Participant.**

**Example:**

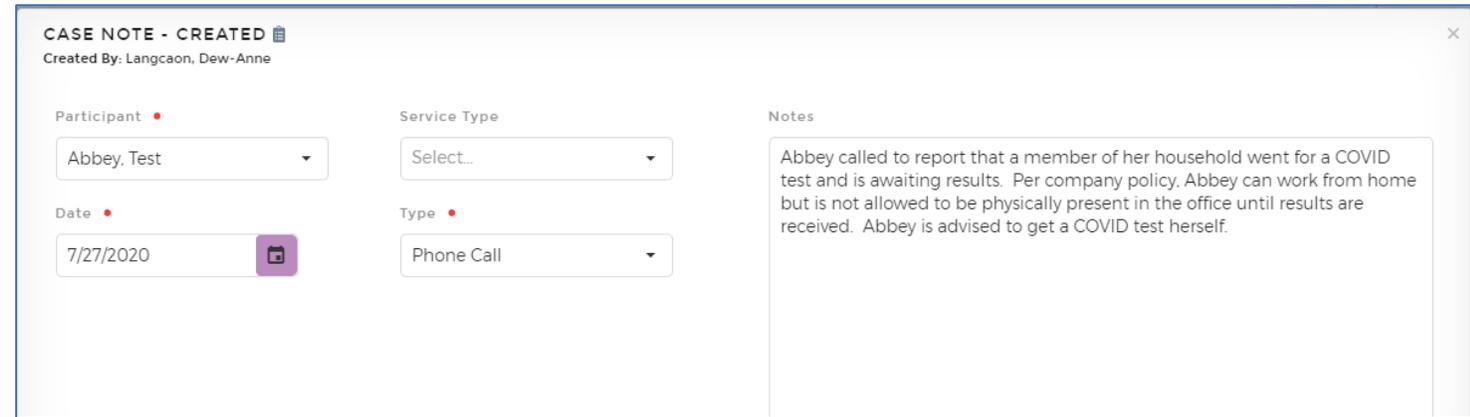
***Day 1 - “Not Cleared for Work” due to a household member being tested and pending results. By Company policy, employee may work from home but not come in to the office.***

***Day 2 - Employee also goes for a test***

***Day 3 – Employee and household member get results of Negative – Cleared for Work***

**Each phone call with the employee can be documented easily in a Case Note.**

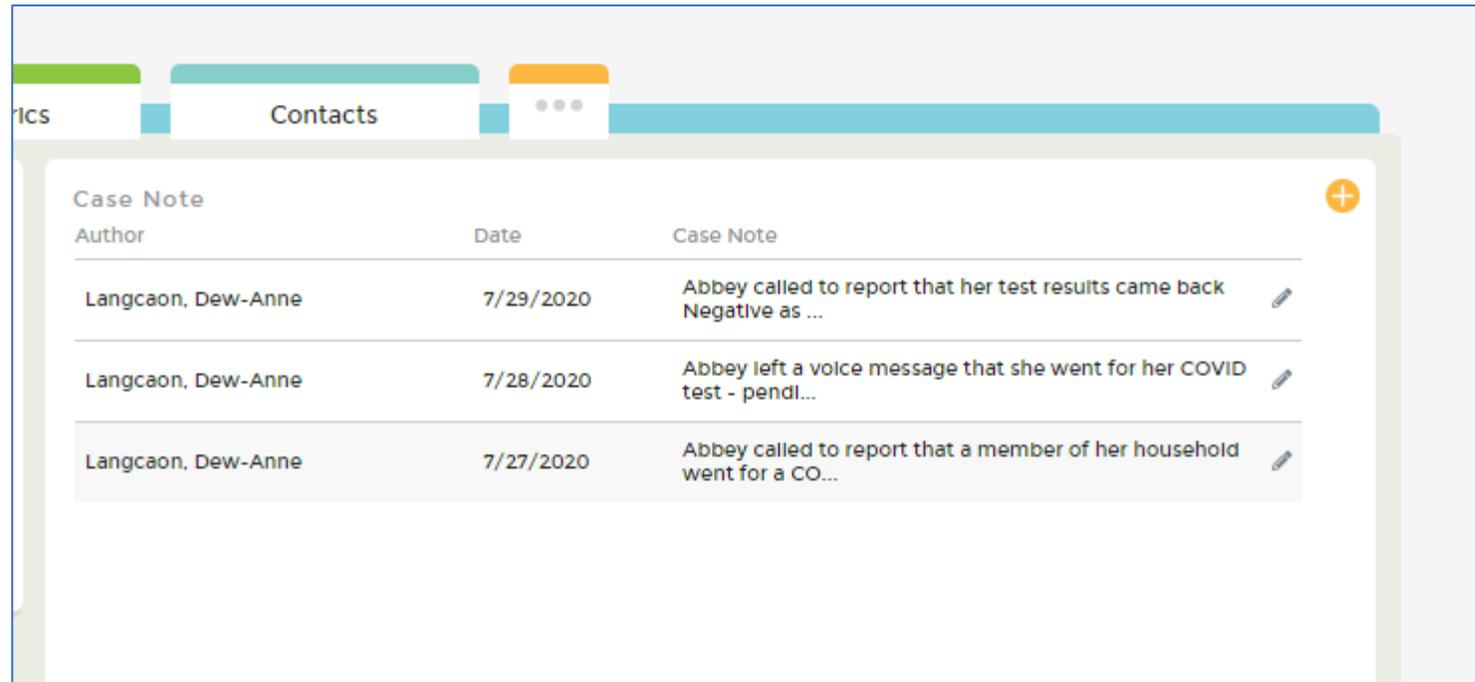
**Supervisors could be entering the notes and Executives and HR can view all notes via Activity or by running reports**



**CASE NOTE - CREATED**  
Created By: Langcaon, Dew-Anne

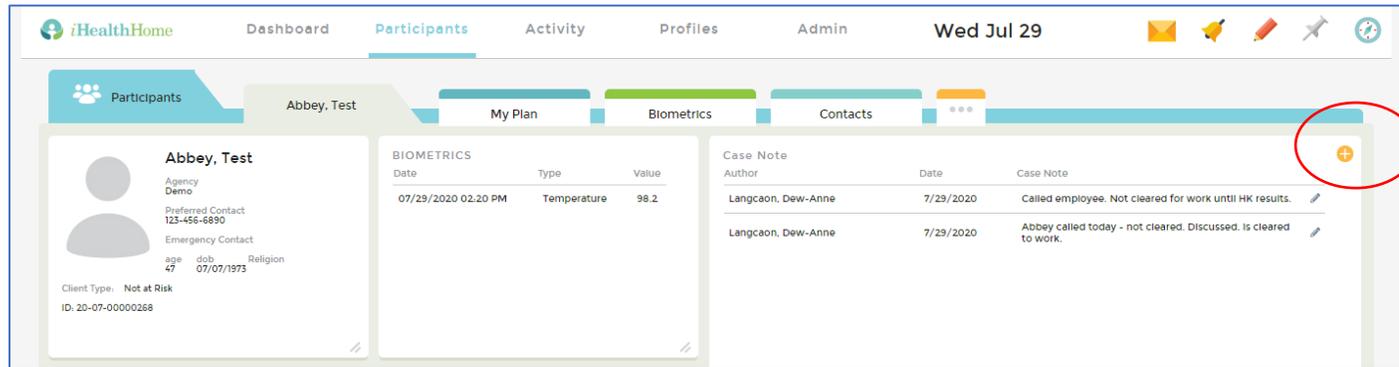
Participant: Abbey, Test  
Service Type: Select...  
Date: 7/27/2020  
Type: Phone Call

Notes: Abbey called to report that a member of her household went for a COVID test and is awaiting results. Per company policy, Abbey can work from home but is not allowed to be physically present in the office until results are received. Abbey is advised to get a COVID test herself.

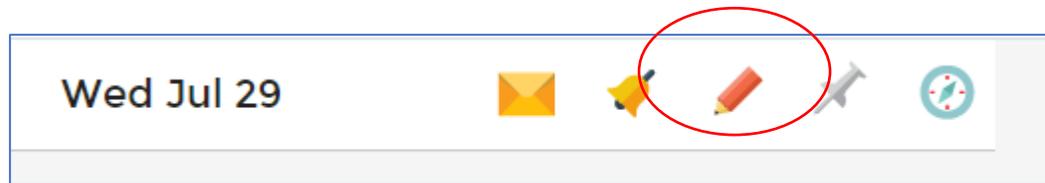


Case Note	Date	Case Note
Langcaon, Dew-Anne	7/29/2020	Abbey called to report that her test results came back Negative as ...
Langcaon, Dew-Anne	7/28/2020	Abbey left a voice message that she went for her COVID test - pendl...
Langcaon, Dew-Anne	7/27/2020	Abbey called to report that a member of her household went for a CO...

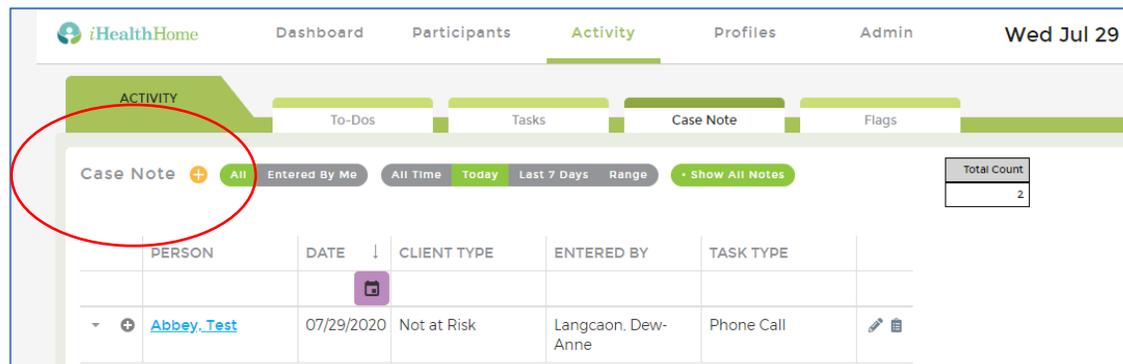
# How to Create a Case Note – 3 Ways



From the Orange Plus sign on a Participants Dashboard



From the Red Pencil in the right corner of any screen



From the Orange Plus sign in the Activity Tab

# Work Status Override

Occasionally you may need to “override” a Risk or Work status generated from the app’s algorithm. For example, an employee has been exposed to someone who has travelled in the last 14 days, but has no symptoms, and has gone for a test which is Negative.

The app will result in a “Not Cleared for Work” but by your company policy, the employee may be “Cleared for Work”.

- Go to the Participant’s Admin form by clicking the bottom right corner
- Select “Work Status” subform
- Click Orange Plus
- Override the status and make a note as to why

# Work Status Override

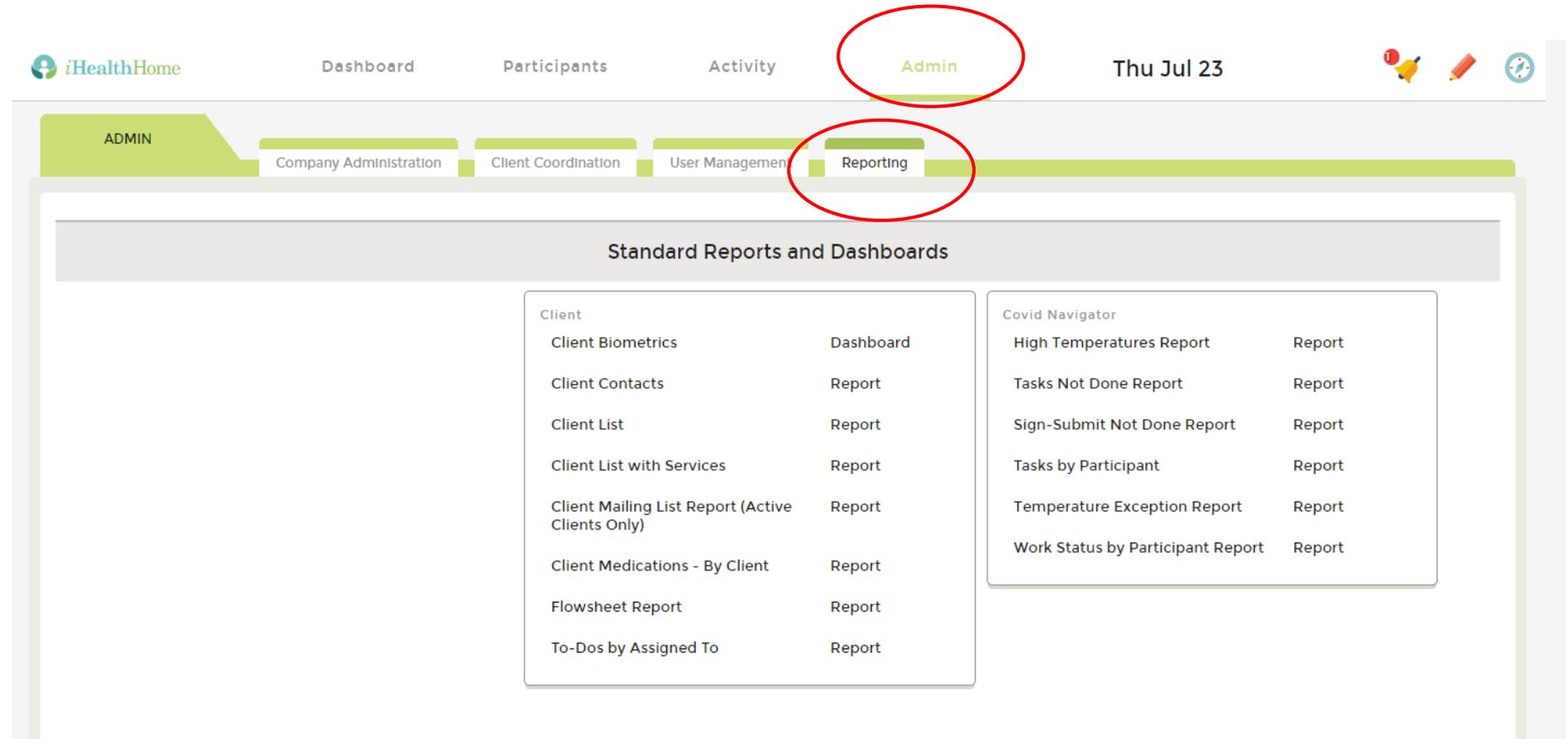
The image displays the iHealthHome interface for managing participant information. The main navigation bar includes 'Dashboard' and 'Participants'. The 'Participants' section is active, showing a list of participants with 'Abbey, Test' selected. The 'Participant Admin' sidebar lists various management options, with 'Work Status' highlighted by a red circle. A modal window titled 'ADD NEW STATUS' is open, allowing for the creation of a new work status. The modal contains the following fields:

- Status:** A dropdown menu with 'Work Status' selected.
- Value:** A dropdown menu with 'Cleared' selected.
- Start:** A date picker set to 7/29/2020.
- End:** A date picker set to 7/29/2020.
- Comments:** A text area containing the text: 'Cleared for work now with a negative test result even if exposed to someone who has recently traveled based on company policy.'

At the bottom of the modal, there are 'CANCEL' and 'SAVE' buttons. A red arrow points from the 'Work Status' option in the sidebar to the modal window.

# Reports Can Be Found in Admin

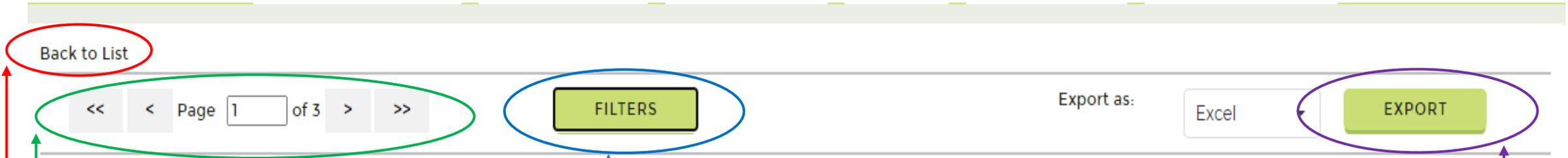
- Go to Admin
- Click the Reporting Tab
- See the various reports available in the Covid Navigator box



The screenshot shows the iHealthHome Admin interface. The top navigation bar includes 'Dashboard', 'Participants', 'Activity', 'Admin', and 'Thu Jul 23'. The 'Admin' tab is highlighted with a red circle. Below the navigation bar, the 'Reporting' sub-tab is also highlighted with a red circle. The main content area is titled 'Standard Reports and Dashboards' and contains two columns of reports:

Client	
Client Biometrics	Dashboard
Client Contacts	Report
Client List	Report
Client List with Services	Report
Client Mailing List Report (Active Clients Only)	Report
Client Medications - By Client	Report
Flowsheet Report	Report
To-Dos by Assigned To	Report

Covid Navigator	
High Temperatures Report	Report
Tasks Not Done Report	Report
Sign-Submit Not Done Report	Report
Tasks by Participant	Report
Temperature Exception Report	Report
Work Status by Participant Report	Report



For any report you can:

Go Back to the list of reports by clicking “Back to List”

View Multiple Pages by clicking the arrow buttons on either side of the page numbers.

Filter – apply filters by date, names, work status, etc.

Export – any report into 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
- Use the Filter button to designate the day or range of dates

<< < Page 1 of 3 > >> FILTERS

**Sign-Submit Not Done Report**

Name	Cell Phone	Email
Abbey, Test	123-456-6890	Abbey@me.com
Aiko, Demo	678-123-4567	Aiko@me.com
Amy, Test	555-123-4567	Amy@me.com
Angel, Apple	555-789-4561	angel@me.com
Another, Test	656-123-4567	Another@me.com
Ben, Demo	678-123-5678	Ben@me.com
Bird, Amanda	567-456-3356	Amanda@demo.com
Bloom, Dao	2345789765	okmkeepertest+dao@gmail.com
Boop, Betty	425-789-0099	Betty@demo.com
Brovko, Alex	8789009890	Abrovko@gmail.com
Brown, Dana	234-678-9900	Dana@dana.com
D, D	5555566666	Demo@demo.com
Demo, Alan	555-123-3456	Alan@me.com
Demo, Carole	555-123-3456	Carole@me.com
Demo, Demo	9495552164	Demo8@demo.com
Demo, Jordan	9495552164	Jomclaren8@555.com
Demo, Jordan	555555555	Demo@medikeeper.com
Demo, Kay	555-123-4567	Kay@me.com
Demo, Kevin	2223334444	ihh@covidnav.com
Demo, Your Name	2222222	demodemo@ihh.com

Start Date: 7/22/20 Time Zone: Pacific Standard Time  
Report Run: 7/22/20 10:57 PM

# Tasks by Participant Report

- Reports by employee the list of the tasks completed. In the standard product, the Sign and Submit is the only task
- The Sign and Submit task is only generated after confirming social distancing and recording a temperature
- To print the report with signatures, export as a PDF

ADMIN

Company Administration
Client Coordination
User Management

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Back to List

<< < Page  of 6 > >>

FILTERS

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Employee Name				Not at Risk
Tasks				
Date	Title	Status	Completed On	Signature
7/7/20	Client Signature Received	Complete	7/7/20 8:09 AM	
7/8/20	Client Signature Received	Complete	7/8/20 9:36 AM	
7/9/20	Client Signature Received	Complete	7/9/20 7:26 AM	
7/9/20	Client Signature Received	Complete	7/9/20 7:55 AM	
7/10/20	Client Signature Received	Complete	7/10/20 7:21 AM	
7/13/20	Client Signature Received	Complete	7/13/20 9:54 AM	
7/14/20	Client Signature Received	Complete	7/14/20 8:59 AM	
7/15/20	Client Signature Received	Complete	7/15/20 1:02 PM	
7/16/20	Client Signature Received	Complete	7/16/20 7:56 AM	
7/17/20	Client Signature Received	Complete	7/17/20 10:43 AM	
7/20/20	Client Signature Received	Complete	7/20/20 11:15 AM	
7/21/20	Client Signature Received	Complete	7/21/20 2:47 PM	

Employee Name				Not at Risk
Tasks				
Date	Title	Status	Completed On	Signature
7/6/20	Client Signature Received	Complete	7/6/20 10:06 AM	
7/7/20	Client Signature Received	Complete	7/7/20 9:05 AM	
7/7/20	Client Signature Received	Complete	7/7/20 9:17 PM	
7/8/20	Client Signature Received	Complete	7/8/20 9:40 AM	
7/9/20	Client Signature Received	Complete	7/9/20 9:22 AM	
7/13/20	Client Signature Received	Complete	7/13/20 9:49 AM	
7/14/20	Client Signature Received	Complete	7/14/20 9:26 AM	
7/15/20	Client Signature Received	Complete	7/15/20 11:41 AM	
7/16/20	Client Signature Received	Complete	7/16/20 9:36 AM	
7/17/20	Client Signature Received	Complete	7/17/20 9:07 AM	
7/18/20	Client Signature Received	Complete	7/18/20 5:46 PM	

# Work Status by Participant Report

- Displays by participant the chronological list of their work and risk statuses
- When a status is overridden by an Admin person, and a comment is written, the comment will display in the column
- To view only Work Status – Filter as on next page

## Work Status by Participant

Status Name	Status Value	Start Date	End Date	Is Manual	Comments	Created On
<b>Employee Name</b>						
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 9:04:51 AM
Risk Status	notatrisk	7/22/20	7/22/20	No		Jul 22, 2020 9:04:39 AM
Risk Status	notatrisk	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	notatrisk	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 9:50:28 AM
Risk Status	notatrisk	7/20/20	7/20/20	No		Jul 20, 2020 9:50:11 AM
Risk Status	notatrisk	7/17/20	7/17/20	No		Jul 17, 2020 9:17:11 AM
Risk Status	notatrisk	7/16/20	7/16/20	No		Jul 16, 2020 9:51:39 AM
Risk Status	notatrisk	7/15/20	7/15/20	No		Jul 15, 2020 2:56:24 PM
Risk Status	notatrisk	7/14/20	7/14/20	No		Jul 14, 2020 9:42:45 AM
Risk Status	notatrisk	7/13/20	7/13/20	No		Jul 13, 2020 12:51:04 PM
Risk Status	notatrisk	7/10/20	7/10/20	No		Jul 10, 2020 9:48:09 AM
Risk Status	notatrisk	7/9/20	7/9/20	No		Jul 9, 2020 12:34:17 PM
Risk Status	notatrisk	7/8/20	7/8/20	No		Jul 8, 2020 10:29:05 AM
Risk Status	notatrisk	7/7/20	7/7/20	No		Jul 7, 2020 9:35:32 AM
Risk Status	notatrisk	7/6/20	7/6/20	No		Jul 6, 2020 12:08:13 PM
<b>Employee Name</b>						
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 3:04:48 PM
Risk Status	notatrisk	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 7:32:06 AM
Risk Status	notatrisk	7/21/20	7/21/20	No		Jul 21, 2020 7:31:45 AM
Work Status	Cleared	7/20/20	7/20/20	No		Jul 20, 2020 9:38:43 AM
Risk Status	notatrisk	7/20/20	7/20/20	No		Jul 20, 2020 9:38:38 AM

- Click on the Filter button
- Select only Work Status if you want to only see Cleared vs. Not Cleared
- Select the statuses you would like to view – Cleared only, or both Cleared and Not Cleared
- Select the start and end date of the range.
- Hit OK.

The screenshot shows a 'REPORT FILTERS' dialog box with the following sections:

- Status Name:** Available: 2, Selected: 0. Search list... (magnifying glass icon).

Work Status
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 Select All     Deselect All     Invert
- Status Value:** Available: 4, Selected: 0. Search list... (magnifying glass icon).

atrisk
Cleared
notatrisk
Not Cleared

 Select All     Deselect All     Invert
- Is Manual:** Available: 1, Selected: 0. Search list... (magnifying glass icon).

No
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 Select All     Deselect All     Invert
- Start Date between:** DAY-1 [calendar icon] and DAY [calendar icon]

CANCEL    OK

# Work Status by Participant

## Cleared vs. Not Cleared

- Filter to Work Status
- Select Cleared or Not Cleared or Both depending on what you want to view
- Select the Date Range
- Note: any notes entered into an Override will appear in the Comments section

### Work Status by Participant

Status Name	Status Value	Start Date	End Date	Is Manual	Comments	Created On
<b>Employee Name</b>						
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 9:50:28 AM
<b>Employee Name</b>						
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 7:32:06 AM
Work Status	Cleared	7/20/20	7/20/20	No		Jul 20, 2020 9:38:43 AM
<b>Employee Name</b>						
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 6:12:50 PM
Work Status	Cleared	7/21/20	7/21/20	No		Jul 21, 2020 7:07:54 AM
Work Status	Cleared	7/20/20	7/20/20	No		Jul 20, 2020 7:11:09 AM
<b>Employee Name</b>						
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 12:09:40 PM
Work Status	Cleared	7/20/20	7/20/20	No		Jul 20, 2020 9:52:17 AM
<b>Employee Name</b>						
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 4:04:49 PM
<b>Employee Name</b>						
Work Status	Not Cleared	7/22/20	7/25/20	Yes	Not Cleared for work in the office only work from home per company policy.	Jul 22, 2020 3:50:51 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