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 archieve

- 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

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
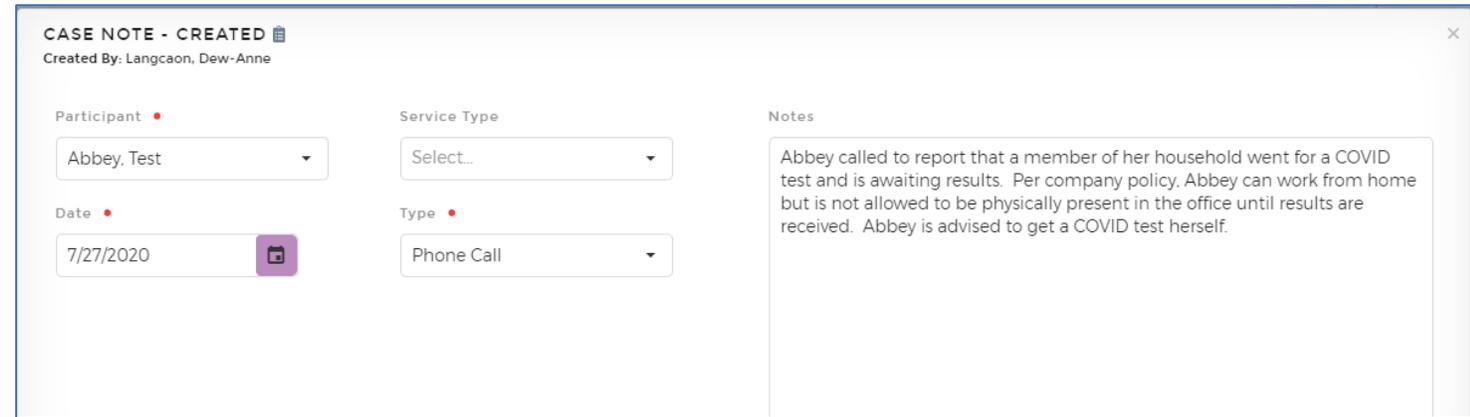

CASE NOTE - CREATED 📋
Created By: Langcaon, Dew-Anne

| Participant ●	Service Type	Notes
Abbey, Test ▾	Select... ▾	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.

Date ●	Type ●
7/27/2020 📅	Phone Call ▾

Contacts
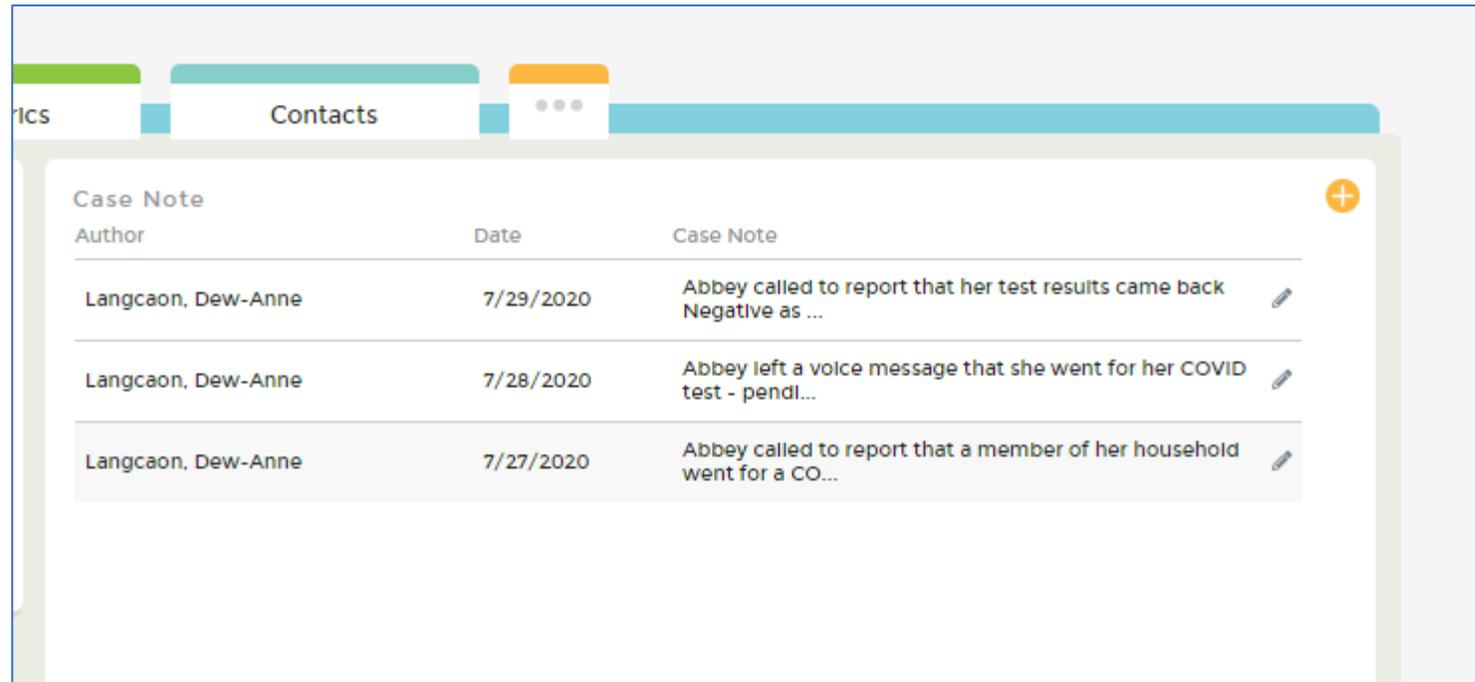
Case Note

| Author	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 - pendi... ✎
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
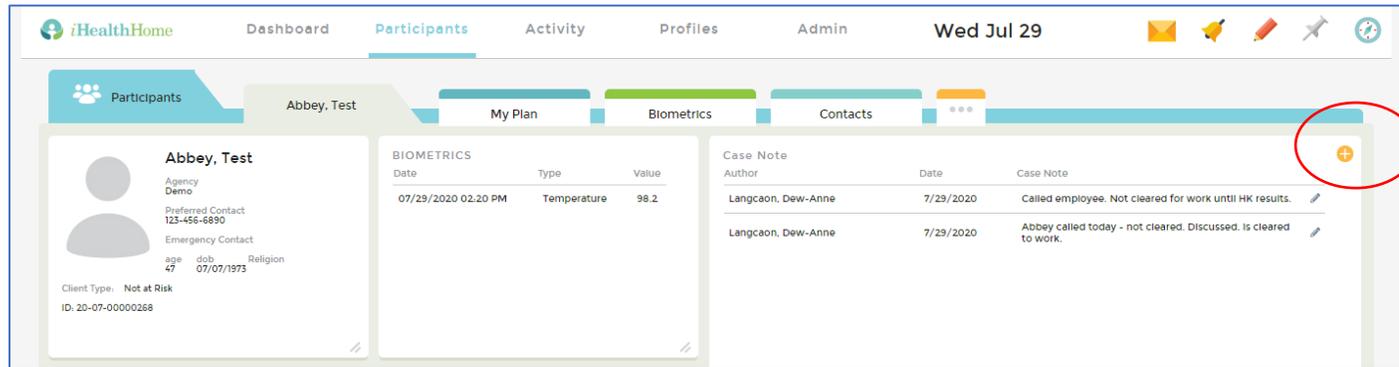
From the Orange Plus sign on a Participants Dashboard
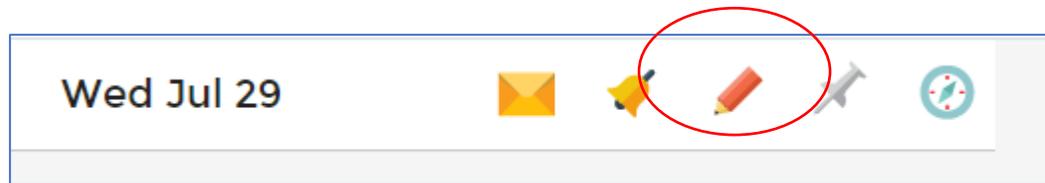
From the Red Pencil in the right corner of any screen
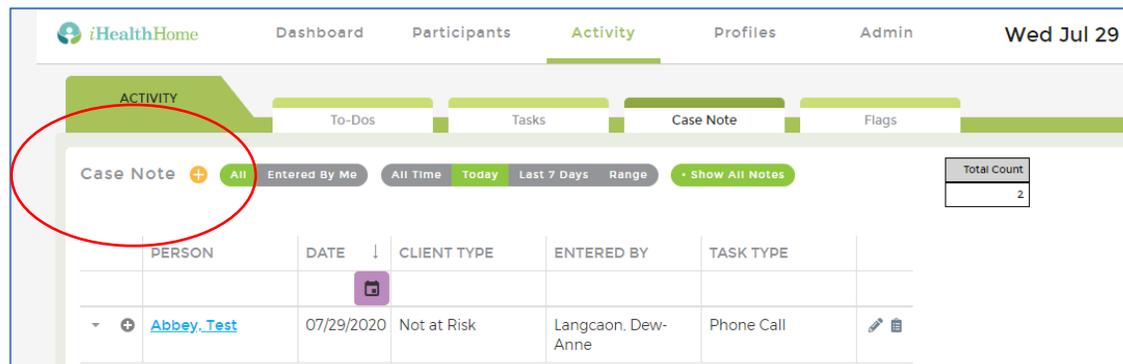
From the Orange Plus sign in the Activity Tab

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
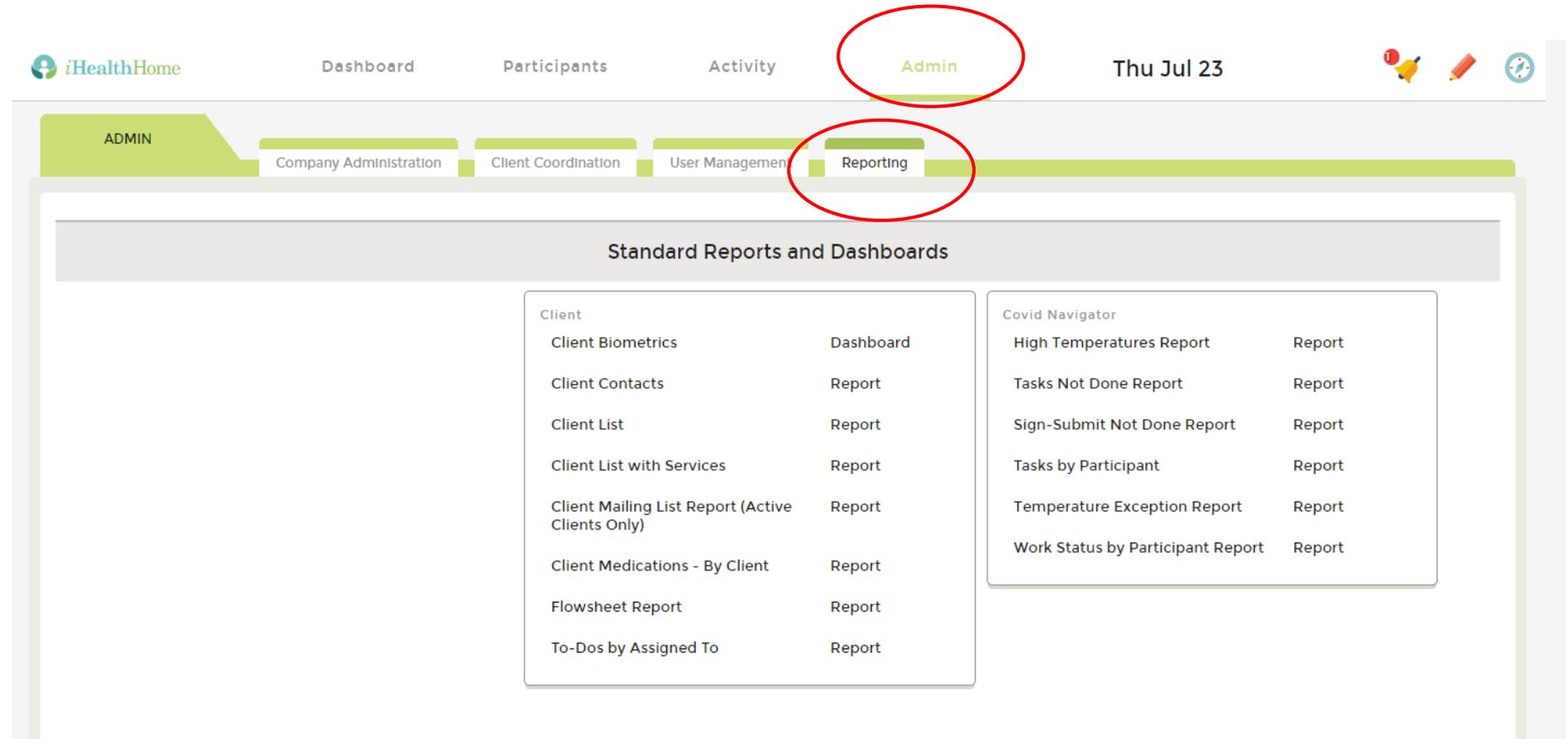
Work Status Override

Reports Can Be Found in Admin

- Go to Admin

- Click the Reporting Tab

- See the various reports available in the Covid Navigator box

Back to List

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FILTERS

Export as: Excel EXPORT

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

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	lhh@covidnav.com
Demo, Your Name	2222222	demodemo@ihh.com

Start Date:	7/22/20	**Time Zone:**	Pacific Standard Time

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

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

- 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.

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
Employee Name						
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
Employee Name						
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
Employee Name						
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
Employee Name a						
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
Employee Name						
Work Status	Cleared	7/22/20	7/22/20	No		Jul 22, 2020 4:04:49 PM
Employee Name						
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