

Workforce Safety v12 PDF

A new version of Appian is available! Update now to take advantage of the [latest features in Appian 22.3](#).

This version of Workforce Safety is not supported and this content is no longer being maintained. See [What's New with Workforce Safety?](#) for information on the latest release.



This content applies solely to Workforce Safety, which must be purchased separately from the Appian base platform. This content was written for Appian 21.2 and may not reflect the interfaces or functionality of other Appian versions.

Workforce Safety Overview

Helping organizations safely return to onsite work

As many workplaces transition back to onsite work in the wake of the COVID-19 pandemic, human resource and crisis management teams are working hard to return their workforce safely to the workplace.

To ensure people are productive and safe in the workplace, organizations are considering:

- [Enabling employees and visitors to self report symptoms and status before being allowed onsite.](#)
- [Making sure employees and visitors who are on site are authorized to be there through a daily mobile access pass.](#)
- [Collecting and reporting on vaccination data to assess community health and make critical decisions.](#)
- [Planning ahead by having employees create on-site reservations for workspaces.](#)
- [COVID-19 testing.](#)
- [Intelligent contact tracing for people and areas in the workplace that have been exposed to COVID-19 using CDC-recommended case management.](#)
- [Isolating individuals who have been diagnosed with, are symptomatic of, or exposed to COVID-19.](#)

Appian Workforce Safety provides all of these benefits and more to help organizations get back to a new normal.



Good evening, Charles

Office Deep Cleaning Next Monday

The office is undergoing a deep cleaning to ensure a safe working environment. Please work from home next Monday.

8 days ago

2 more announcements >

Please stay home for now

You are advised to stay home and will not be permitted to request a pass based on the latest information provided to us.

Log your contacts

Anyone that was within 6 feet of you for at least 15 minutes

Any area that you visited or used while at a facility

LOG CONTACTS

Update your vaccination status

To better understand our community's health, we are asking everyone to provide their current COVID-19 health information.

UPDATE PROFILE

What does the Workforce Safety solution provide?

Workforce Safety offers a wide-range of capabilities to give organizations the ability to respond to crisis situations and manage the return-to-workplace process.

A unified response hub

The solution includes a response hub that allows response management teams to see and manage the health and work status of employees in one central location that's updated in real-time.

appian INCIDENTS ACTIVITY PEOPLE REPORTS CONFIGURE Response Hub

You have 3 employee vaccinations to verify **VERIFY PROOF OF VACCINATION**

Search incidents SEARCH STATUS Any TYPE Any ASSIGNED Any IMPACTED PERSON Any USER PMS Any FACILITY Any DEPARTMENT Any

+ REPORT INCIDENT

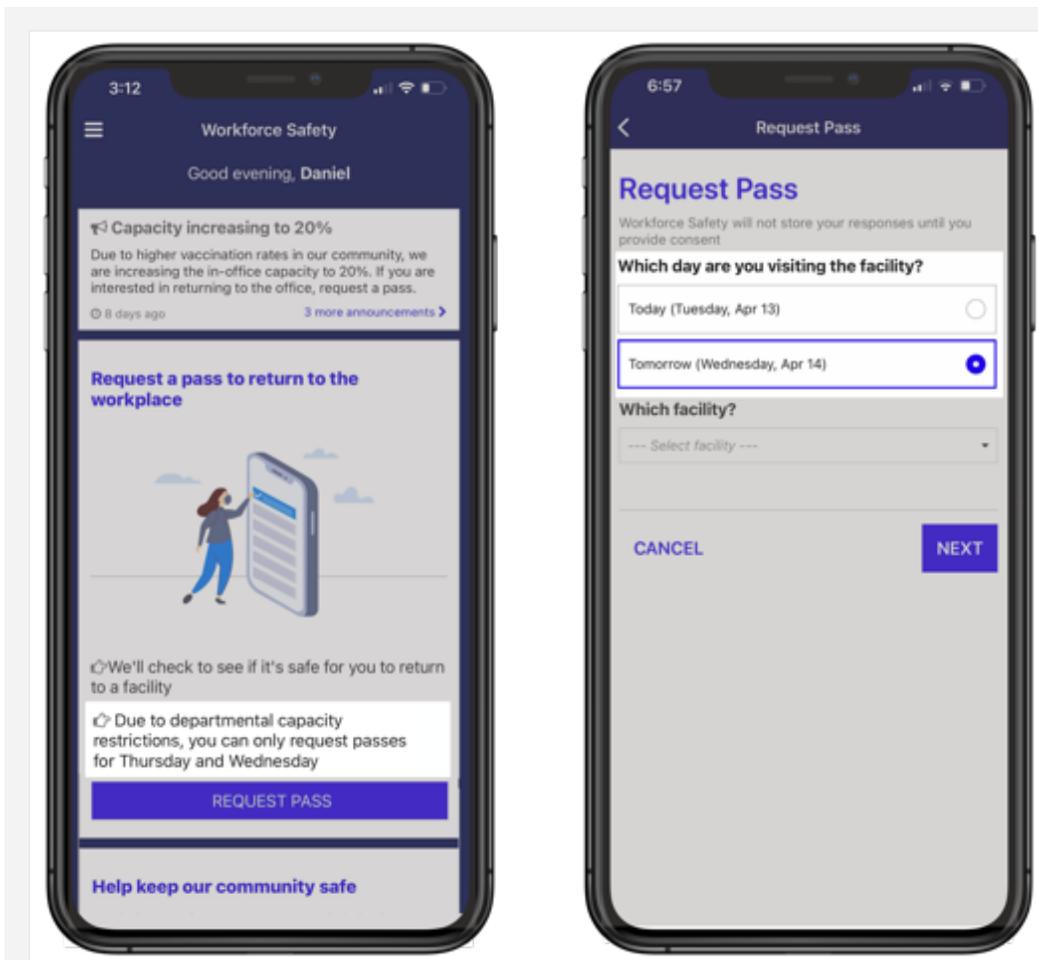
STATUS	Incident ID	Type	Assignee	Impacted Person	Facility	Department	Last Updated
	55	Pass Request Response	Unassigned	Daniel Nelson	Boston Office	Information Technology	Apr 15 2:37PM
	3	Pass Request Response	Maria Lopez	Everleigh Bennett	Denver Office	Operations	Apr 8 3:24PM
	6	Pass Request Response	Maria Lopez	Rose Vincent	Denver Office	Operations	Apr 8 3:24PM
	7	Pass Request Response	Maria Lopez	Patricia Johnson	New York Office	Human Resources	Apr 8 3:24PM
	10	Pass Request Response	Maria Lopez	Omar Barnes	Denver Office	Information Technology	Apr 8 3:24PM
	19	Pass Request Response	Maria Lopez	Oscar Cristian	New York Office	Finance	Apr 8 3:24PM
	21	Pass Request Response	Maria Lopez	Raelynn Wayton	Denver Office	Human Resources	Apr 8 3:24PM

An automated, phased approach to returning to the workplace

Appian Workforce Safety supports a safe, phased approach to returning your workforce to the workplace using area capacity management and cohorting.

Do you want to limit the amount of people that are allowed in one floor or office area? Workforce Safety allows you to set capacity limits for each area. When users request a pass, they can see all of the areas that have capacity remaining, and they won't be able to request a pass for areas that are at capacity.

One of the latest CDC-recommended mitigation practices is called cohorting. Cohorting is basically assigning people to groups and keeping those groups together to limit contact with other groups. With Workforce Safety, you can assign departments to cohorts and determine which days of the week users can request a pass for. This not only helps limit the spread of COVID-19, but it also reduces the amount of passes that will be issued each day.

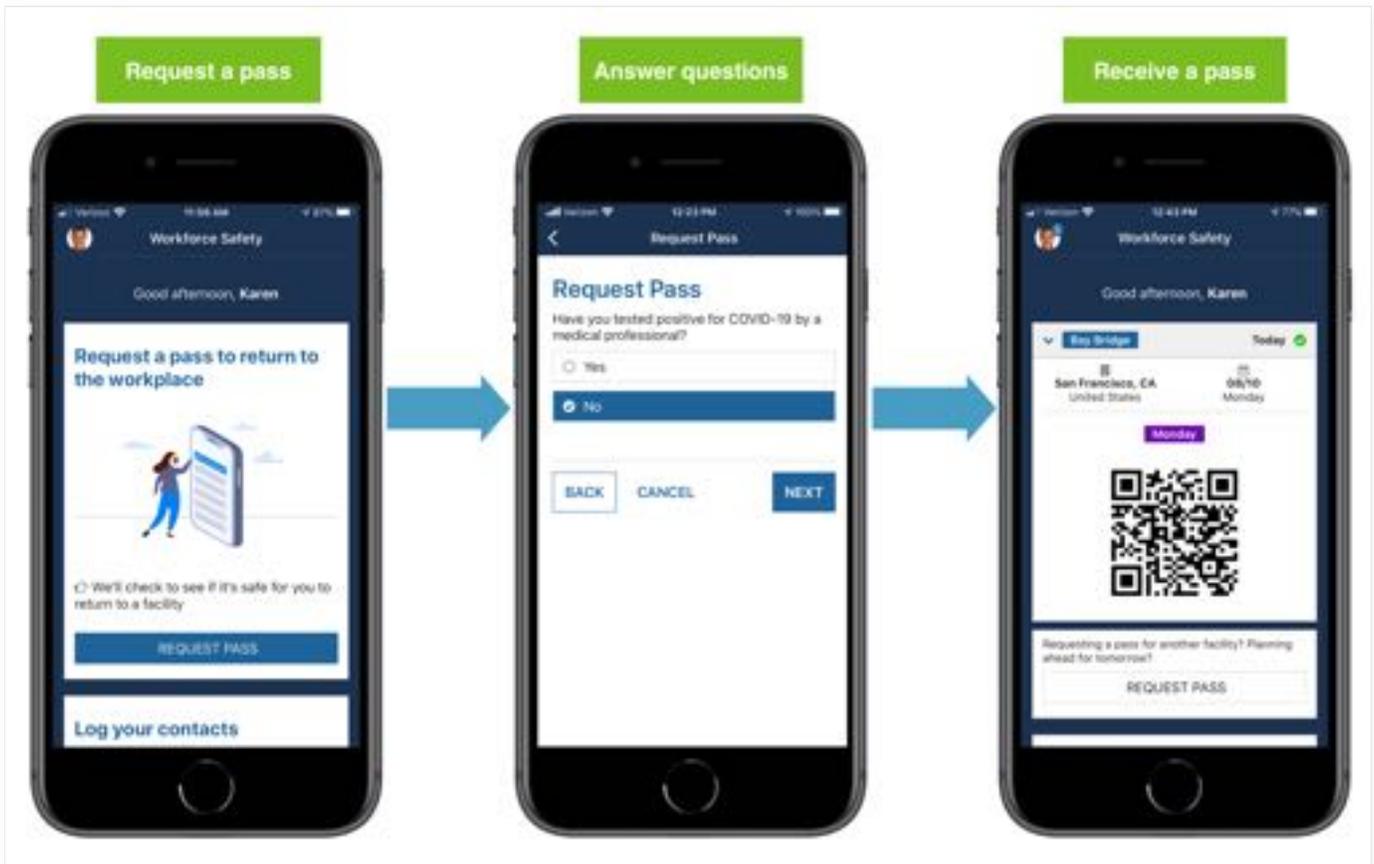


Fast, easy workforce screening and mobile passes

Whenever an employee or visitor intends to come onsite, they use a simple web or mobile interface to request a pass to be allowed to come in to a certain facility.

During this process, they will be asked about their health and risk status to determine if it is safe for them to return.

If none of their answers disqualify them, they are automatically granted a mobile pass for that day and facility.

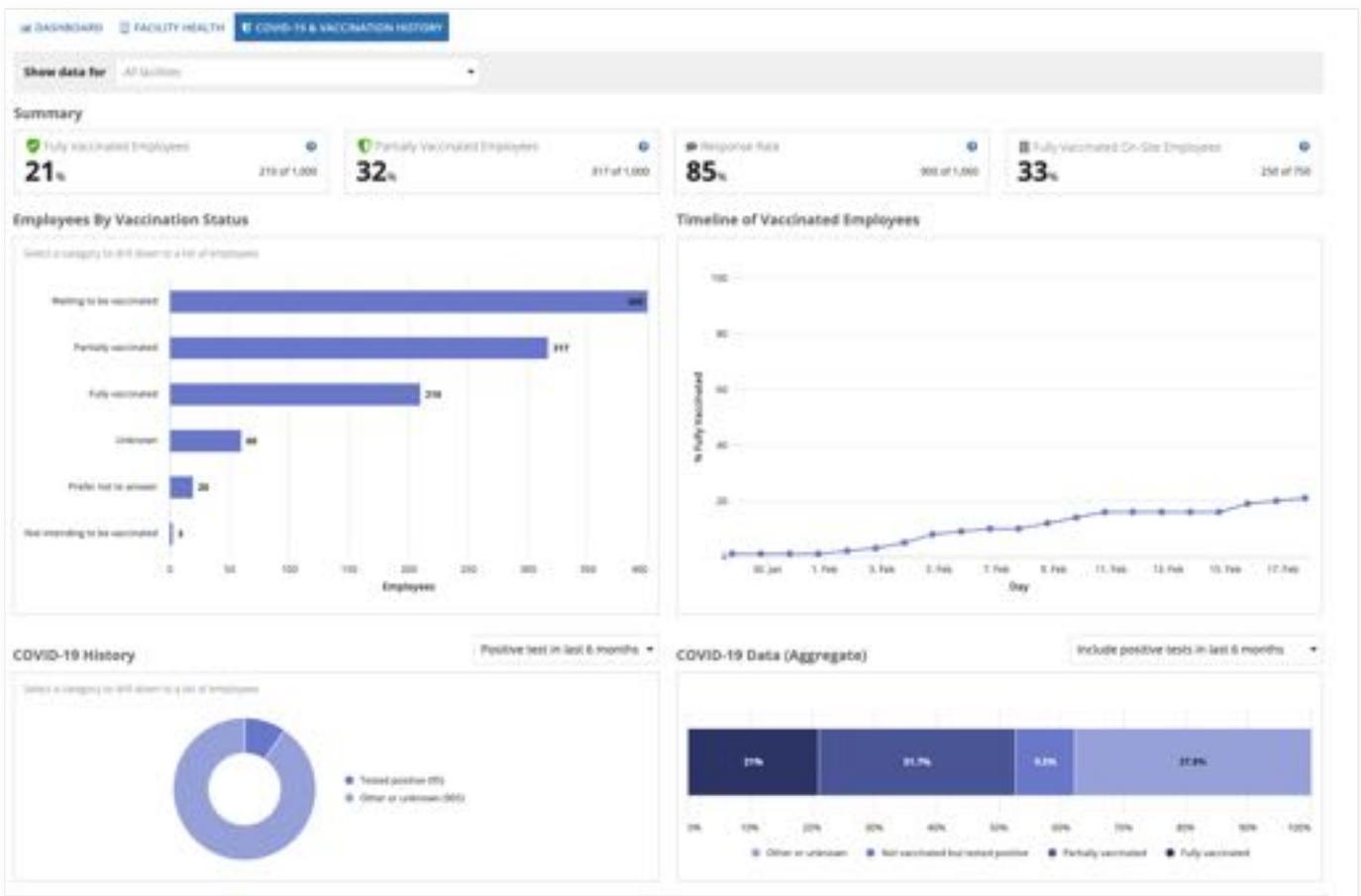


Flexible, user-friendly, and compliant vaccination data reporting

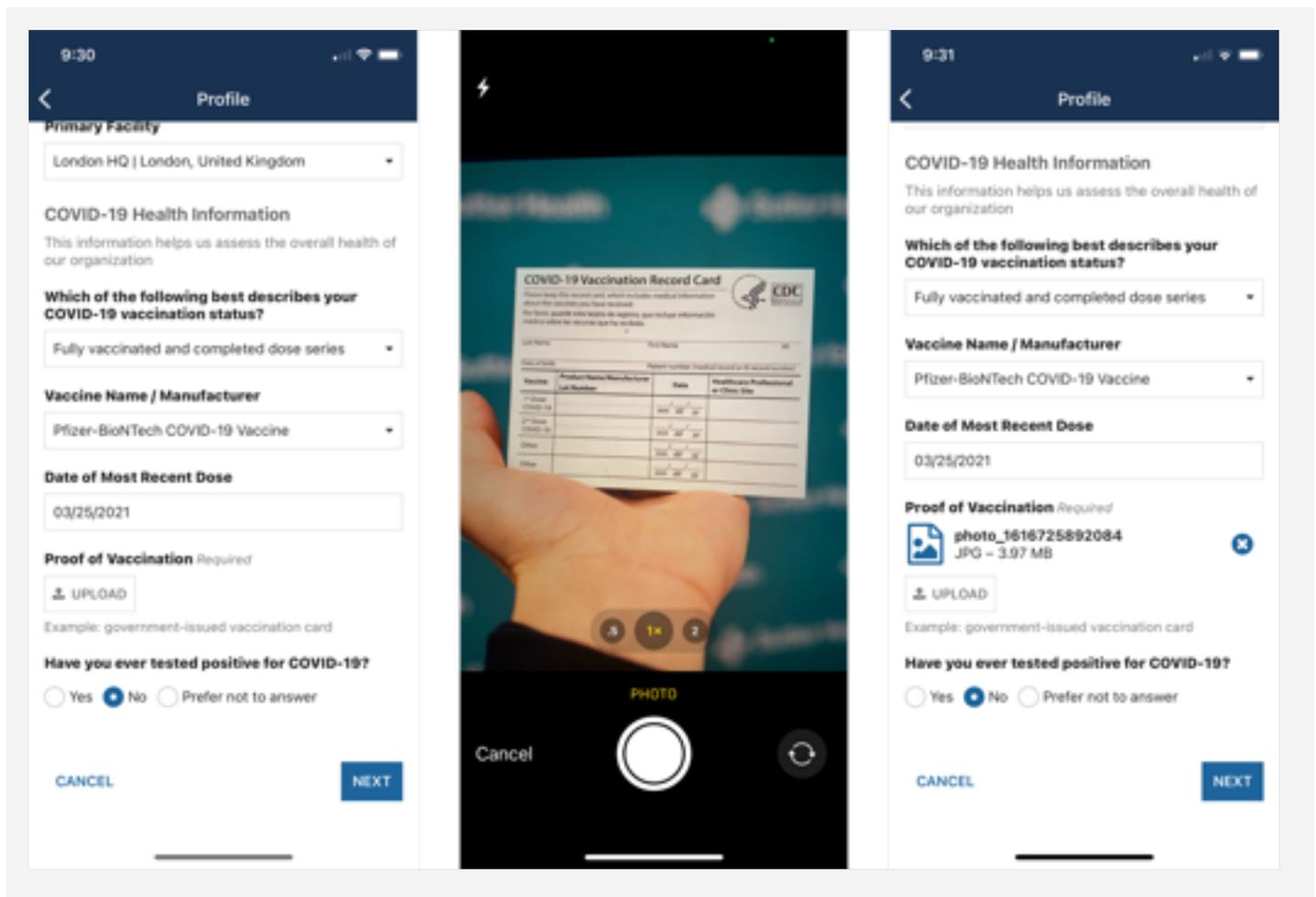
As COVID-19 vaccines become more widely available, understanding the vaccination levels of your organization will be critical in making future operations decisions.

Appian Workforce Safety offers a flexible, user-friendly, and compliant way to collect, manage, and report on vaccine data.

You can ask users to report their vaccination status and collect proof of vaccination. Users who are verified as fully vaccinated can also be granted special permissions, such as skipping pass request questions. You have control over which vaccination questions are asked, how messaging is phrased, and what information is required.

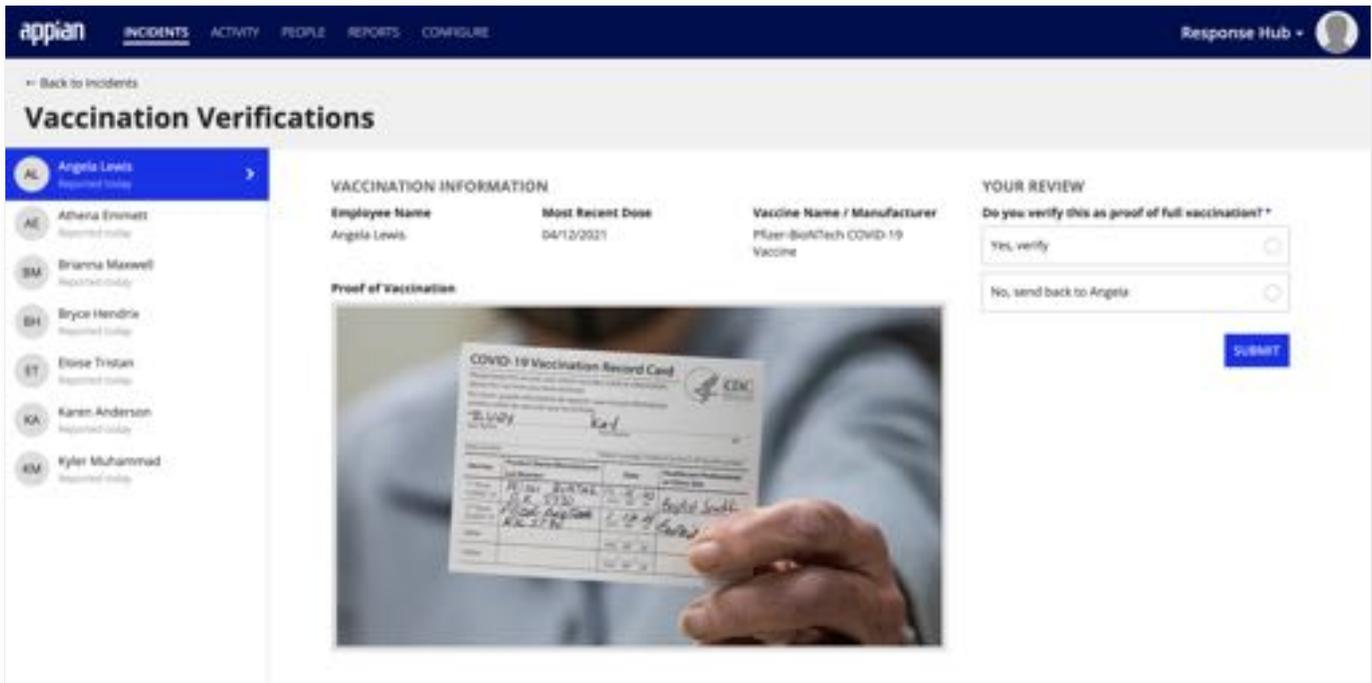


When a user is ready to provide their proof of vaccination, they can simply tap **Upload** in their Profile form and use their mobile device's camera to capture a photo of their vaccination proof or upload a file.



Once a user has provided their proof of vaccination, response managers can quickly review the queue. If there are users in the review queue, a banner will appear in the INCIDENTS page indicating how many employees require verification.

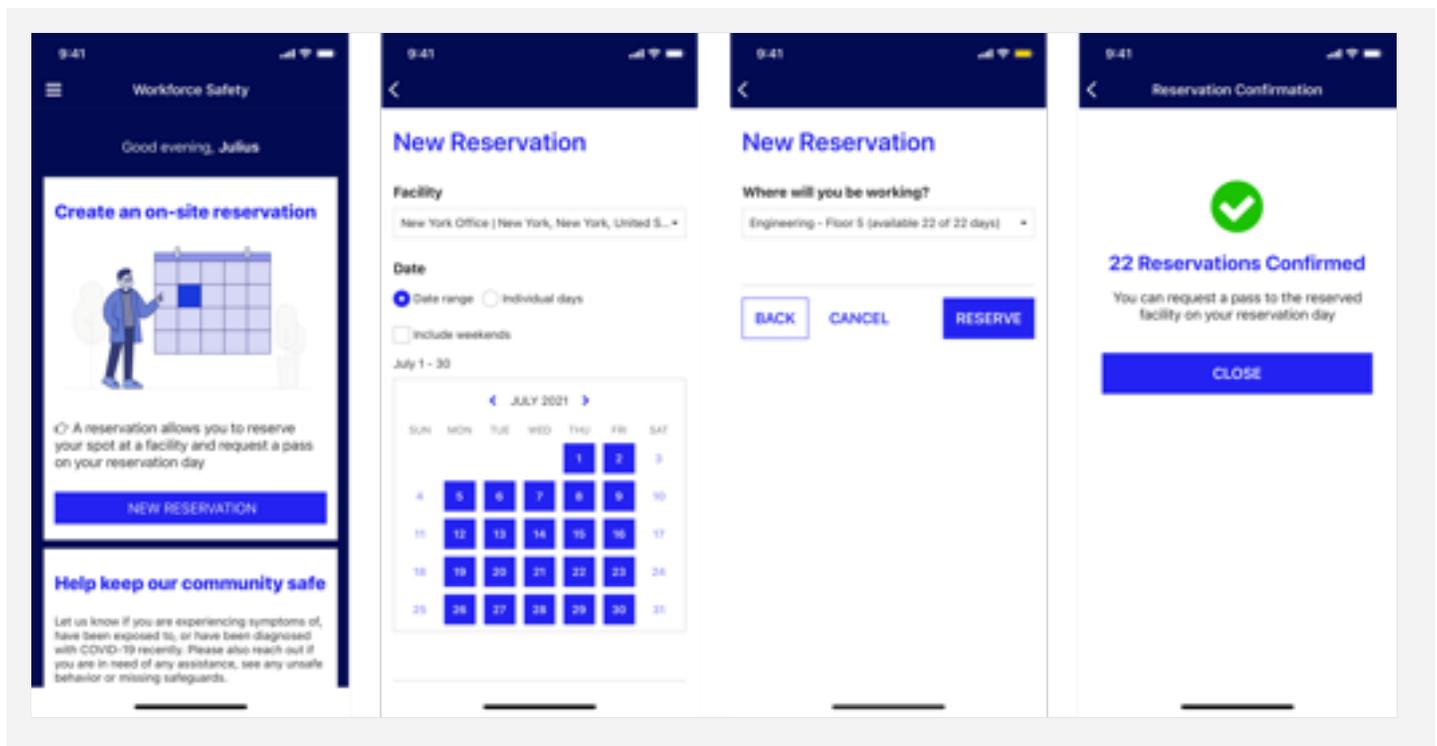
When a response manager clicks **Verify Proof of Vaccination**, they are taken to a review portal. From this view, a reviewer can quickly go through the employee que and see all employees that submitted proof of vaccination, including any relevant information provided by the employee such as the their most recent dose date, name, and vaccine name/manufacturer.



Intuitive capacity and facility management with on-site reservations

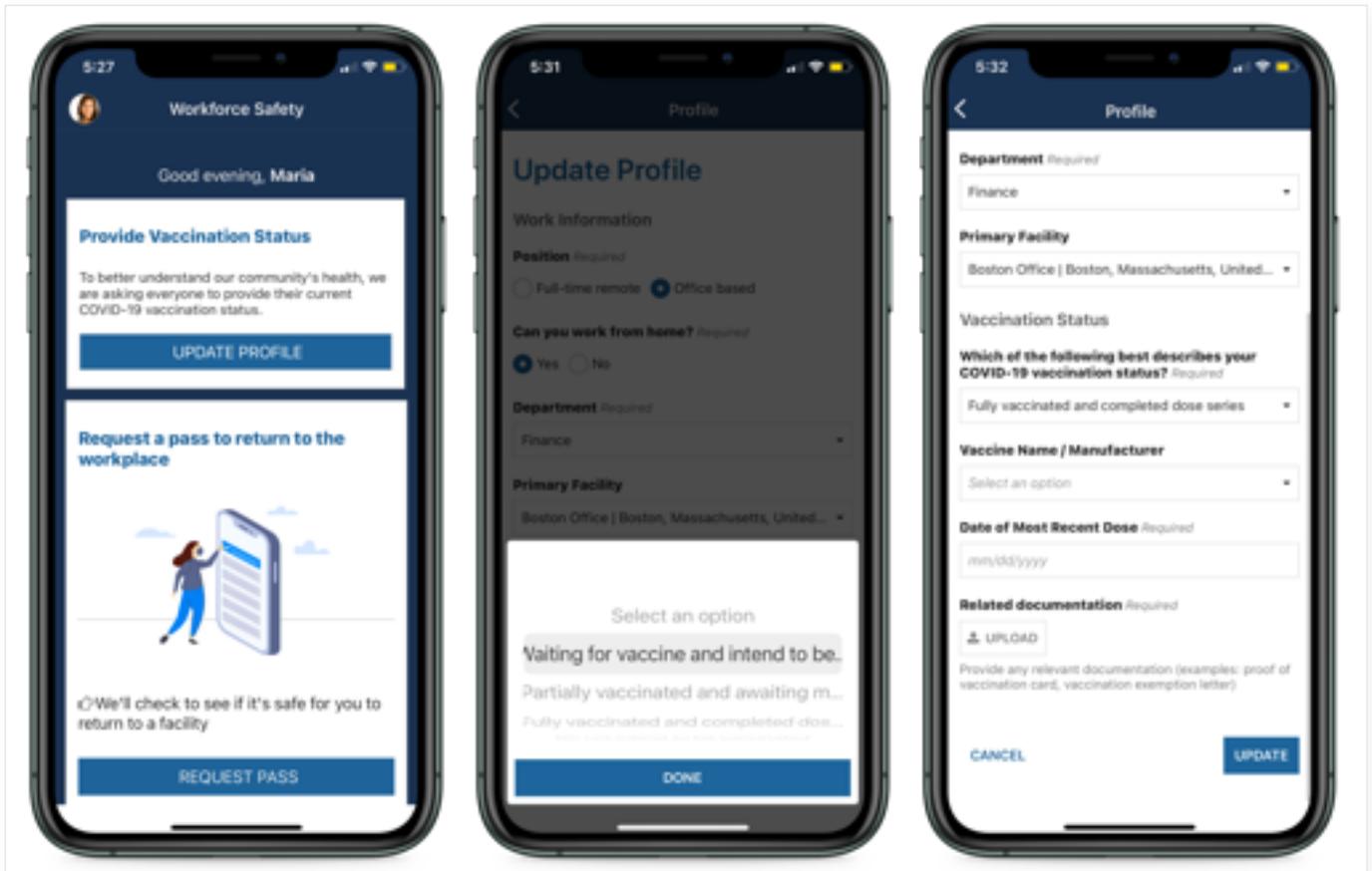
On-site reservations allow organizations and employees to plan ahead by allowing employees to create a reservation for a facility ahead of time. Using Area Capacity Limits, organizations can configure capacity limits to encourage social distancing and employees can reserve specific workspaces when creating a on-site reservation.

To streamline the experience for your fully-vaccinated employees, you can enable auto-issuing passes, which provides fully-vaccinated employees their pass on the reservation date.



Easy, secure forms for employees

Employees can easily update their vaccination status and use their mobile phone to upload related documents or take a picture of their CDC-issued vaccination card. When it's time for an additional vaccine dose, users are reminded to update their vaccination status. All information is captured and stored safely in the Appian HIPPA-compliant Cloud.



Configure data collection to only capture what you need

Organizations have full control of how vaccine information is captured, including what questions are asked and what data is required. Workforce Safety allows you to collect employee intent to get vaccinated, whether someone is partially or fully vaccinated, proof of vaccination, and dose dates.

INCIDENTS ACTIVITY PEOPLE REPORTS **CONFIGURE** Response Hub - Appian

Vaccination Insights

Use Vaccination Insights to collect COVID-19 vaccination history information from users.

Active Vaccination information is being collected from users. DEACTIVATE QUESTIONS

Questions

Configure the questions that you need to ask users to determine their vaccination status. These questions will appear in a user's Profile form.

Active	Required	Question	Question Shown	Response / Response Type	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Which of the following best describes your COVID-19 vaccination status?	Always	<ul style="list-style-type: none"> Waiting for vaccine and intend to be vaccinated Partially vaccinated and awaiting more doses Fully vaccinated and completed dose series Do not intend to be vaccinated Prefer not to answer 	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vaccine Name / Manufacturer	When selected vaccination status is <ul style="list-style-type: none"> Partially vaccinated and awaiting more doses Fully vaccinated and completed dose series 	<ul style="list-style-type: none"> Other COVID-19 Vaccine Do not know / Prefer not to answer Pfizer-BioNTech COVID-19 Vaccine Moderna COVID-19 Vaccine 	Edit Vaccine Options
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date of Most Recent Dose	When selected vaccination status is <ul style="list-style-type: none"> Partially vaccinated and awaiting more doses Fully vaccinated and completed dose series 	Date	
<input type="checkbox"/>	<input type="checkbox"/>	Provide further explanation as to why you do not intend to be vaccinated	When selected vaccination status is <ul style="list-style-type: none"> Do not intend to be vaccinated 	Text	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Related documentation	When selected vaccination status is <ul style="list-style-type: none"> Partially vaccinated and awaiting more doses Fully vaccinated and completed dose series Do not intend to be vaccinated 	File Upload	

5 items

End User Prompt

The following prompt is shown to users to collect their vaccination status. Users are also reminded to update their vaccination status after 28 days if they are awaiting a vaccine. Edit the message to tailor it to your policies.

Provide Vaccination Status

To better understand our community's health, we are asking everyone to provide their current COVID-19 vaccination status.

[UPDATE PROFILE](#)

[EDIT MESSAGE](#)

Trace exposed contacts

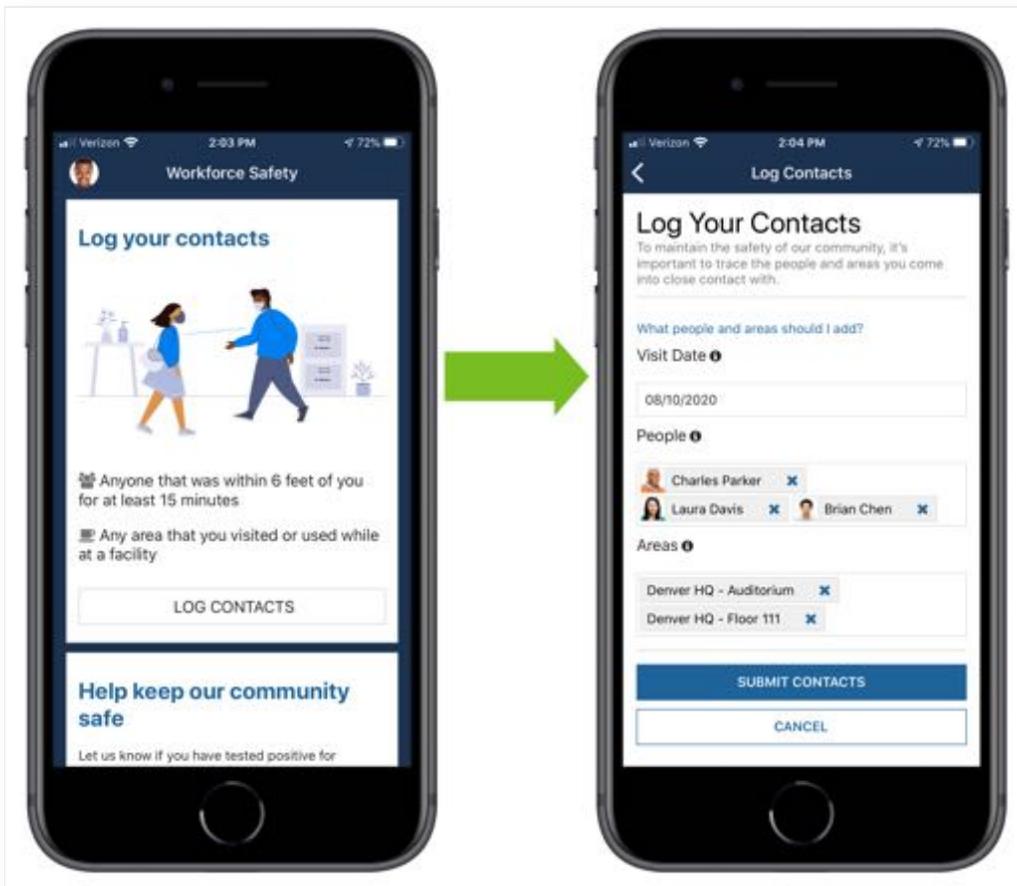
No matter the due diligence of an organization, exposures will inevitably happen. Responding quickly to positive cases is key to preventing and controlling an outbreak.

That's why Workforce Safety makes it easy to determine which people and areas have been exposed, as well as to notify exposed individuals.

Proactively log contacts with people and areas

Each day, users can log the people and areas that they had contact with that day. This means that as soon as a positive case is identified, there is already reliable contact tracing data that can be used to notify and isolate exposed individuals.

Contact tracing can even be enforced by requiring users to log this information before they are allowed to request another pass.



Actionable data to trace exposed contacts

Any user who has been diagnosed with, is symptomatic of, or exposed to COVID-19 can report so in the app. This allows response managers to easily view key information such as:

- Who was directly exposed to the virus through close contact.
- Which areas were exposed to the virus, and which people were exposed to those areas.

Response managers can then take key actions on exposed contacts, such as notifying them via email, [isolating](#) them so that they quarantine, or requesting that they [get tested](#).

The screenshot displays the 'Exposed People' and 'Exposed Areas' sections of the Appian Response Hub. The 'Exposed People' section lists individuals who were exposed to the incident, including Daniel Nelson, Joe Aarons, Sally Bell, and Tim Gibson. The 'Exposed Areas' section lists locations where exposure occurred, including Main Lobby - Floor 1, Main Reception - Floor 11, and Sales - Floor 10. Each entry includes a status indicator (e.g., 'Exposed', 'Confirmed') and a 'Request Tests' button.

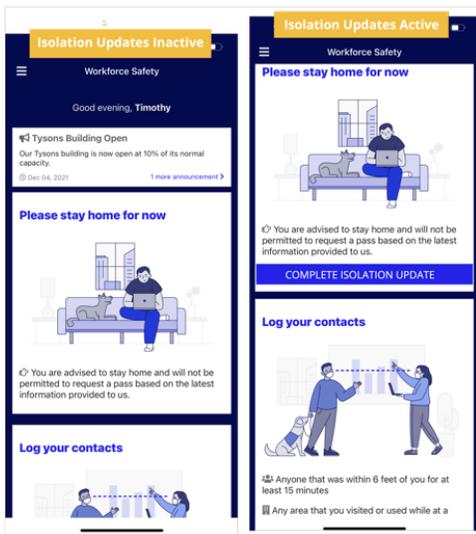
Isolating workers based on COVID-19 diagnosis, symptoms, or exposure

When individuals have been diagnosed with, are symptomatic of, or exposed to COVID-19, they will automatically be placed in isolation with the creation of the COVID-19 isolation incident.

From this incident, response managers can track recovery progress, follow-up with the individual, request tests, and view their exposed contacts.

The screenshot displays the 'Incident Details' and 'Recovery Criteria' sections of the Appian Response Hub. The 'Incident Details' section includes information about the incident, such as the incident type (COVID-19 Isolation), the facility (New York Office), and the assigned user (Laura Davis). The 'Recovery Criteria' section shows the current status of the incident, including the recovery criteria (Waiting for negative COVID-19 test result or 7-day recovery period) and the response manager notes (Incident is closed as the user has been placed in isolation). The 'Impacted User Details' section shows the user's status (2 days in isolated status) and the testing status (View Request).

Isolated users will no longer be allowed to request a pass until they are taken out of isolation. Instead, they will be asked to complete an isolation update to let your organization know how they are doing.



Overseeing and managing COVID-19 testing

Testing is one of the cornerstones of limiting the spread of COVID-19. Workforce Safety provides a centralized tool to request tests and follow up on those requests.

Response managers can request test results from individuals or groups. Additionally, they can select a random sample from a group of individuals, or group together individuals to be tested in a pool.

What is pool testing? It is a testing method that combines samples from several people and conducts one test on the combined sample to detect COVID-19. If the results are negative, no further testing is needed. If it is positive, the individuals in the pool can be tested individually.

Why is pool testing used? This method can save time, testing materials, and money.

Request COVID-19 Tests

Select Users
Enter Request Details
Review

Indicate the type of testing to perform for this batch:

Batch Name *

Batch Description

Randomly Sample From Selected Users? *

Yes No

Random Sampling Percentage *

Enter a number greater than 0 and less than 100. Sample size based on selected users and percentage above: 8 Users

Pool Samples for Test Result? *

Yes No

Require Response Manager Verification of Test Result Evidence? *

Yes No

Testing Guidance *

Due to a recent COVID-19 diagnosis in the organization, we are requesting a random sample of tests from certain individuals. Please stop by the onsite clinic for your free test by the end of the day tomorrow.

BACK
CANCEL
NEXT

What do I do next?

See the [Setup Guide](#) for instructions on how to get up and running with the Workforce Safety solution.

To understand more about the solution's features and group security, see the [User Guide](#).

Workforce Safety 12.0 Release Notes

Plan ahead with on-site reservations

As more employees return to the workplace this fall, organizations will need help managing their facilities and capacity as part of their return-to-office plans. Whether you're implementing a hybrid work model or returning to pre-pandemic seating, the Workforce Safety **On-Site Reservations** feature will help you establish a "new normal" and ensure your workforce's transition back to the office is smooth.

Allow employees to create on-site reservations

Planning ahead not only reduces uncertainty for your facility managers, it improves the workplace experience for your employees during times of uncertainty. The **On-Site Reservations** feature allows users to create reservations ahead of time, giving your organization a heads up that they're coming to a facility. By combining the On-Site Reservations with **Area Capacity Limits**, the Workforce Safety solution makes employees feel safer, knowing there's a seat at the facility reserved just for them.

Reservations also allow you to plan ahead and know exactly which employees to expect at a facility on any given day. Quickly determine how many resources you'll need on the ground and if you'll need to conduct pre-visit protocols. Use this feature to build employee trust and reduce issues around capacity utilization.

To enable and configure On-Site Reservations, simply navigate to the **On-Site Reservations** card on the **CONFIGURE** page and turn the **Enable On-Site Reservations** toggle on. Control how far in advance employees or response managers can create a reservation by configuring the Reservation Window.

The screenshot displays the Appian Workforce Safety 12.0 configuration interface. At the top, the navigation bar includes 'INCIDENTS', 'ACTIVITY', 'PEOPLE', 'REPORTS', and 'CONFIGURE'. The 'CONFIGURE' section is active, showing 'GENERAL SETTINGS', 'FACILITIES', and 'DEPARTMENTS'. The 'Questionnaire Settings' section allows users to tailor questions for Pass Request, Intake Survey, and Isolation Update. It features two toggle switches: 'Prepopulate Questionnaire Answers' (checked) and 'Reduce Questionnaire Scrolling' (checked). Below this, there are three feature cards: 'Pass Request' (ACTIVE), 'Intake Survey' (INACTIVE), and 'Isolation Update' (INACTIVE). The 'Manage Features' section is the primary focus, displaying a grid of feature cards. The 'On-Site Reservations' card is highlighted in white, indicating it is the selected feature. Other cards include 'Incident Management', 'Capacity Management', 'Vaccination Insights', 'COVID-19 Testing', 'Safety Guidelines', 'Cohort Management', and 'Community Volunteering'.



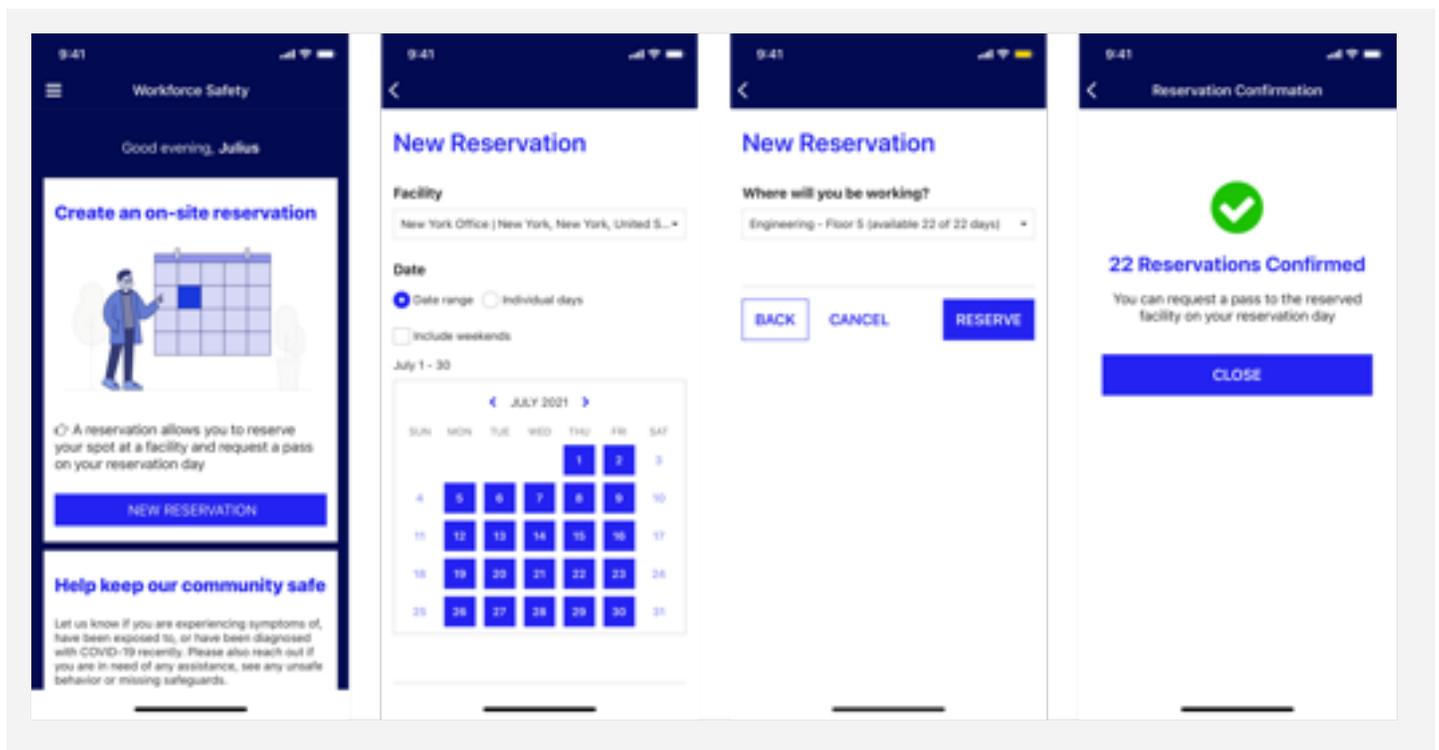
When you turn this feature on, users are impacted in the following ways:

- If a user has an active pass, the pass remains active.
- Users must create a reservation before requesting a pass.
- Users who are fully vaccinated will be auto-issued their pass on the reservation date when the **Skip Pass Request Questions for Fully Vaccinated Employees** toggle is turned on.
- Users can create on-site reservations for any given date or multiple dates, a facility, and an area (if area capacity limits are enabled).
 - **Note:** Existing permissions that apply when requesting a pass also apply to creating a reservation. For example, a user in isolation cannot create a pass request or a reservation.
- Users and response managers can create multiple reservations at one time.
- Users and response managers can cancel an on-site reservation any time before the reservation date.
 - **Note:** Users can only cancel their reservations, not the reservation of another user.

Note that turning the Enable On-Site Reservations toggle off will cancel all upcoming reservations.

Creating an on-site reservation

When On-Site Reservations are enabled, **New Reservation** is the primary action on an employee's landing page. Now the **Request a Pass** action becomes available only after an employee creates a reservation.



When users create a reservation, Workforce Safety pre-populates the reservation with the user's primary facility. Users can easily:

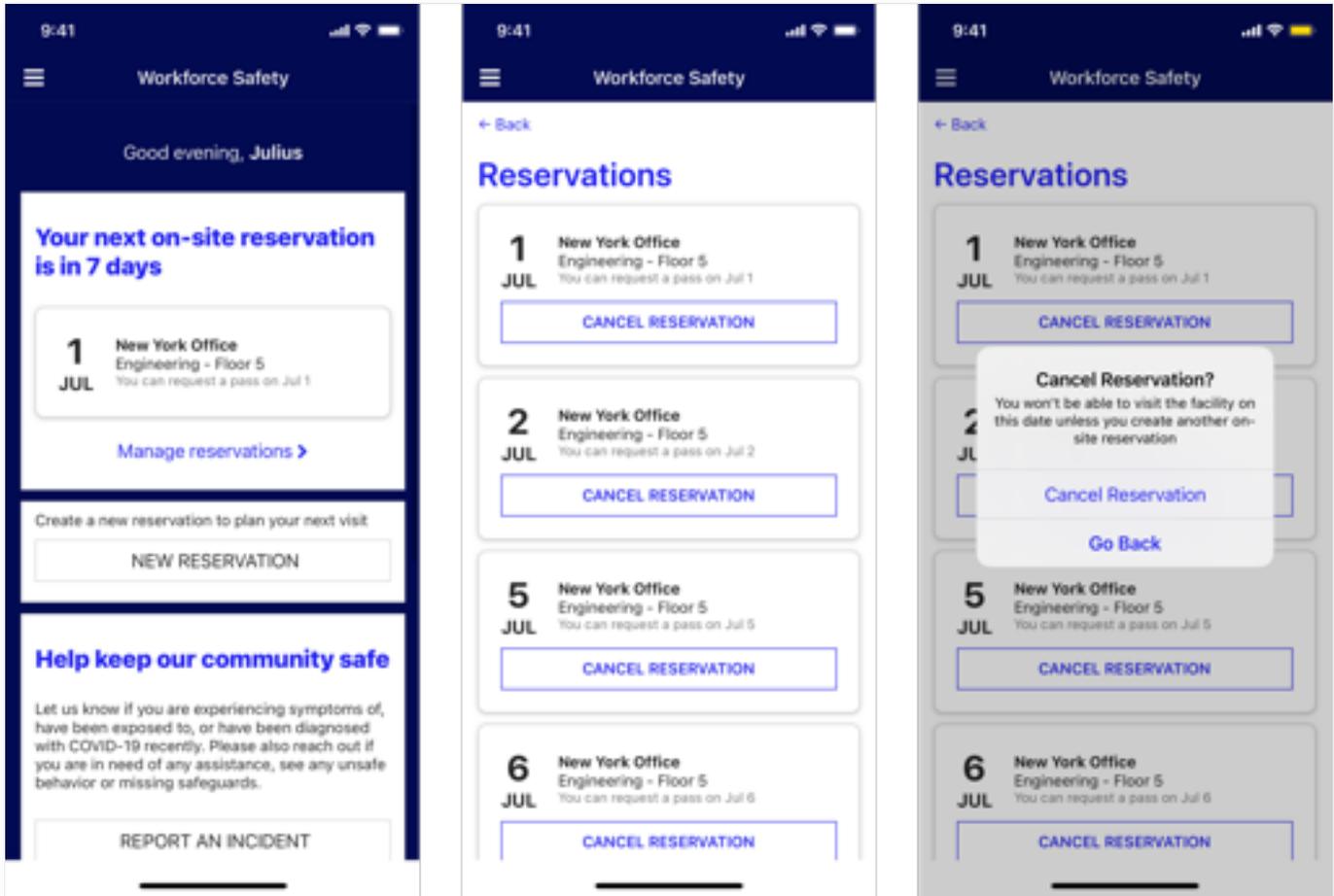
- Select a different facility for their reservation using the **Facility** drop-down menu.
- Select a range of dates with two easy taps from the **Date Range** view.
- Select dates ad-hoc from the **Individual Dates** view.
- Create same-day reservations when needed.

If an employee already has a reservation for the selected facility on a given date, the date picker is disabled. The date picker is also disabled when the user's cohort cannot have on-site visits.

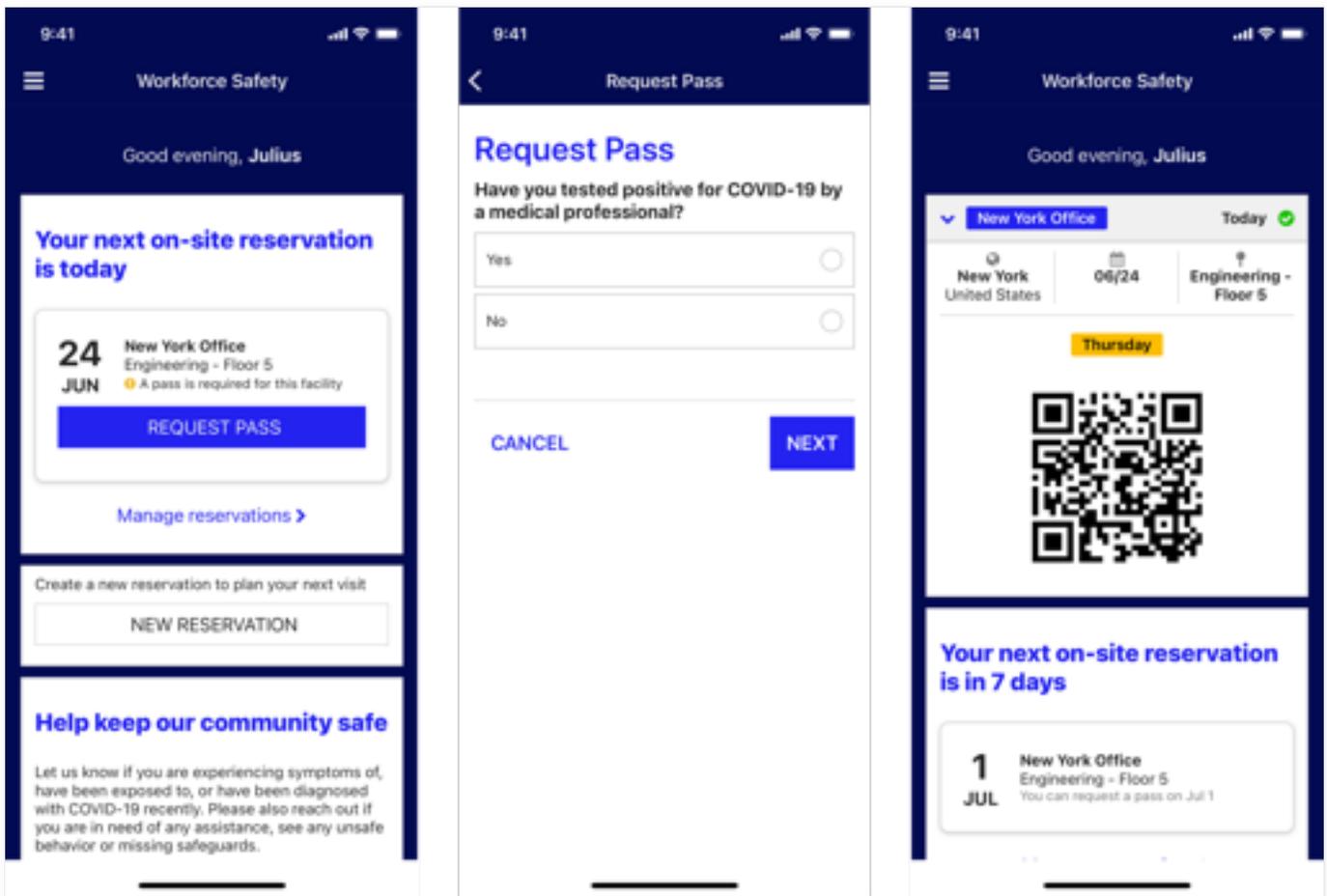
If an employee chooses an area that is not available for all their reservation dates, they must select a different area for those dates. For example, if the area is at capacity on one of the reservation dates, the user must select a different area for that day.

After submitting the reservation form, users are redirected to their landing page. They'll receive an email confirming their reservation.

Before an employee's reservation date, they can always view their upcoming reservation on their landing page. If necessary, they can also cancel any upcoming reservations they've created via the **Manage Reservations** link on their landing page.



The pass request workflow walks users through the configured pass request questions and, if qualified, the employee receives a pass to come on-site.



If an employee is placed in isolation either manually or due to a questionnaire answer, their upcoming reservations are canceled. If an isolation timeframe is configured, only reservations in that timeframe are canceled.

Auto-issue passes to fully vaccinated employees

As guidelines for fully-vaccinated employees continue to change, you may want to simplify the user experience. If you enable On-Site Reservations, you can also enable the **Auto-Issue Passes to Fully Vaccinated Employees** toggle via the **Vaccination Insights** card on the **CONFIGURE** page. When the Auto-Issue Passes to Fully Vaccinated Employees toggle is enabled, fully-vaccinated employees are auto-issued their pass at midnight on their reservation day.

appian INCIDENTS ACTIVITY PEOPLE REPORTS CONFIGURE Response Hub - 

← Back to General Settings

Collect Vaccination Information

Use this form to collect information about your users' COVID-19 health, including vaccination and COVID-19 positivity history. Questions configured below are shown to users in their Profile form. Insights on this data are available in the Reports tab.

COVID-19 Vaccination Information Options

Manage the health information request workflow.

- Collect Vaccination Information**
When toggled on, users are asked questions about their COVID-19 vaccination status in their profile form. These questions can be configured below.
- Require Proof of Vaccination Verification**
When toggled on, users who report they are fully vaccinated must provide proof of vaccination. This documentation can then be reviewed by Response Managers via the Incidents tab. Once verified, users are classified as "Fully Vaccinated / Verified".
- Auto-Issue Passes to Fully Vaccinated Employees**
When toggled on, fully vaccinated employees are auto-issued a pass on the day of their reservation. When toggled off, fully vaccinated employees must answer pass request questions in a qualifying manner to receive a pass. If the "Require Proof of Vaccination Verification" option is enabled, only employees who have been verified as fully vaccinated can be auto-issued passes.
- Enforce 14-day Waiting Period Before Auto-Issuing Pass**
When toggled on along with "Auto-Issue Passes to Fully Vaccinated Employees", fully vaccinated users can only skip pass request questions 14 days after their last dose.
- Ask for user consent**
When toggled on, users will be asked to acknowledge the configured consent statement prior to submitting their information.

Provide the user consent message

The Facility Record

To accompany on-site reservations, we've introduced a new facility record. This record is a hub for all things related to your facilities and is available to all customers, even if they have the On-Site Reservation feature disabled.

The updated facility grid is simpler and easier to read. To visit a facility's record, click its name in the facility grid.

appian INCIDENTS ACTIVITY PEOPLE REPORTS CONFIGURE Response Hub - 

GENERAL SETTINGS **FACILITIES** DEPARTMENTS

Enforce Area Capacity Restrictions
When toggled on, internal users will be asked to select an area when creating a reservation. Reservations can only be created for areas that haven't reached capacity for the selected day. Areas and their capacities can be configured via the capacity management page or on each facility's page.

Facilities

Facilities are physical locations in your organization that your workforce needs to enter on a day-to-day basis.

Search Facilities SEARCH CONFIGURATION Active STATUS: Any

CITY: Any STATE/PROVINCE: Any COUNTRY: Any

Facility Name	Street Address	Unit/Suite/Building	City	State/Province	Country	Zip Code	Configuration
Appian HQ	7950 Jones Branch Dr, McLean, VA	Building 101	Tysons Corner	Virginia	United States	22102	Active
Appian UK (EMEA HQ)	24 Martin Lane, London, EC4R 0DR	-	London	-	United Kingdom	90839	Active
Boston Office	77 Sleeper St, Boston, MA 02210	-	Boston	Massachusetts	United States	02210	Active
Denver Office	1550 Wewatta Street, Denver, CO	Denver Building	Denver	Colorado	United States	80202	Active
New York Office	135 Madison Avenue, 4th Floor, New York,...	Building West	New York	New York	United States	10016	Active

5 items

In the **Summary** view, you'll find all facility-related configured information. This view includes facility-specific charts related to incidents and pass requests. The record also includes facility-specific views for existing grids such as incidents, pass requests, and surveys. Easily edit or close a facility using the **Edit Facility** action.

appian INCIDENTS ACTIVITY PEOPLE REPORTS CONFIGURE Response Hub 

New York Office

EXIT FACILITY INACTIVATE

Summary Areas Incidents Pass Requests On-Site Reservations Related Actions

COVID-19 Isolation Inc: 0 Last 14 days

Open Incidents

Start of Timeframe: 2 Now: 0 Change: -2



Date	Open Incidents
11 Jun	2
12 Jun	0
13 Jun	1
14 Jun	0
15 Jun	0
16 Jun	0
17 Jun	0
18 Jun	0
19 Jun	0
20 Jun	0
21 Jun	0
22 Jun	0
23 Jun	0
24 Jun	0

Pass Requests

Total: 106 Denied: 13 Approved: 93 Last 30 days



Date	Approved	Denied
1 Jun	1	1
2 Jun	1	1
3 Jun	1	1
4 Jun	1	1
5 Jun	1	1
6 Jun	1	1
7 Jun	1	1
8 Jun	1	1
9 Jun	1	1
10 Jun	1	1
11 Jun	1	1
12 Jun	1	1
13 Jun	1	1
14 Jun	1	1
15 Jun	1	1
16 Jun	1	1
17 Jun	1	1
18 Jun	1	1
19 Jun	1	1
20 Jun	1	1
21 Jun	1	1
22 Jun	1	1
23 Jun	1	1
24 Jun	1	1
25 Jun	1	1
26 Jun	1	1
27 Jun	1	1
28 Jun	1	1
29 Jun	1	1
30 Jun	1	1
31 Jun	1	1

Facility Details

Status: **OPEN**

Description: NY Branch Office

Sweet Address: 135 Madison Avenue, 4th Floor, New York, NY

Time/Date/Building: Building West

City: New York

State/Province: New York

Country: United States

Zip Code: 10016

Info: Open 7am - 5pm

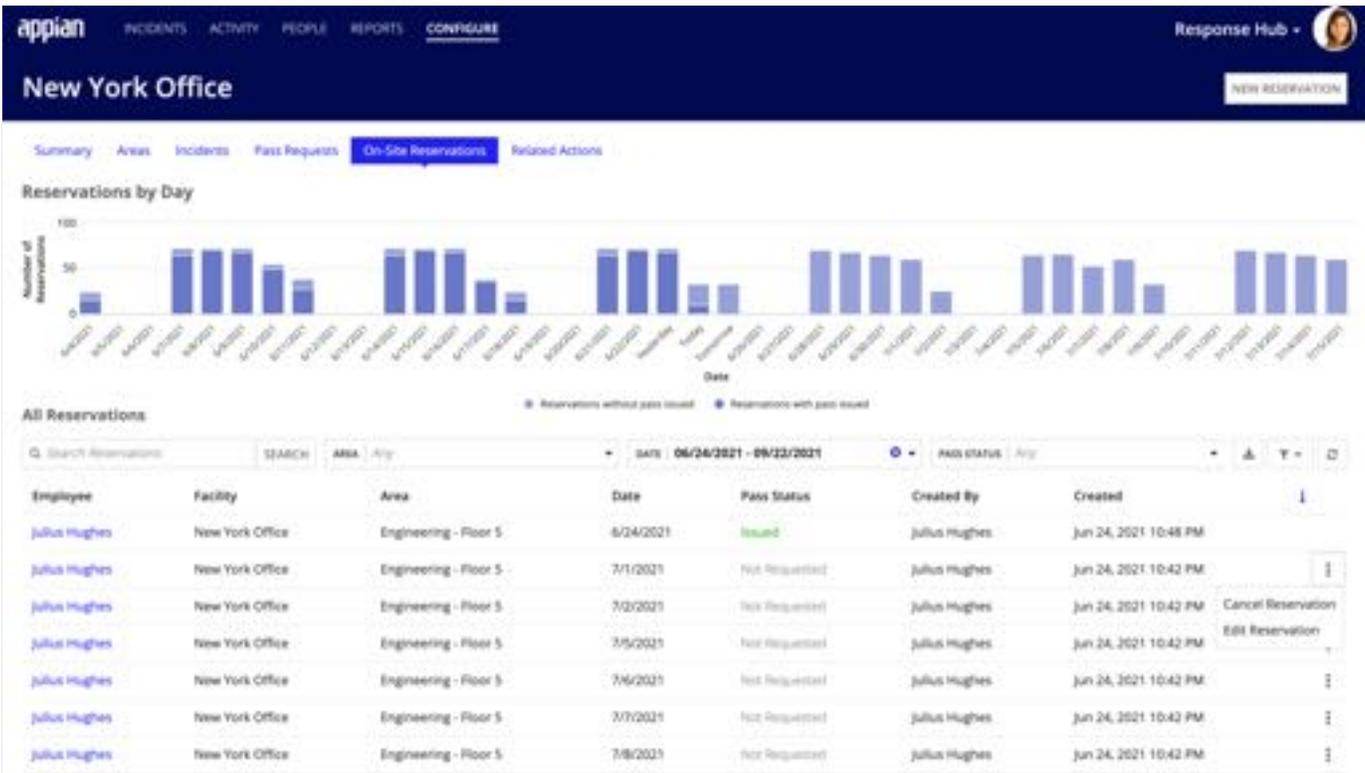
Annual Instructions For Visitors: After arriving at the facility please present your pass to the front desk receptionist

View and manage on-site reservations

Response managers can view and manage all upcoming on-site reservations from the Facility record or ACTIVITY tab. The Facility record provides an **On-Site Reservations** view that allows response managers to understand who is planning future on-site visits.

The **Reservations by Day** graph shows reservations over time for the last 3 weeks and the next 3 weeks. This graph allows response managers to quickly determine which reservations have a pass issued and which reservations do not to help them understand what proportion of employees who create reservations actually keep their reservations and come on-site.

The on-site reservations grid provides more information on each reservation, including the employee, facility, date, area, and pass status. A response manager can create, edit, or cancel a reservation if needed. Use the **New Reservation** button to create a reservation on behalf of an employee.



To edit a reservation's area, a response manager can use the **Edit** action via the menu button. They can then select a new area for the user, including those which are at capacity for special circumstances. The employee then receives an email notifying them of this change. Reservations cannot be edited on the day of the reservation.

appian Response Hub

Edit On-Site Reservation

Employee
Julius Hughes

Date
Jul 1, 2021

Facility
New York Office

Current Area
Engineering - Floor 5

New Area *

--- Select an area ---

--- Select an area ---

Customer Success - Floor 8 (100 spots available)

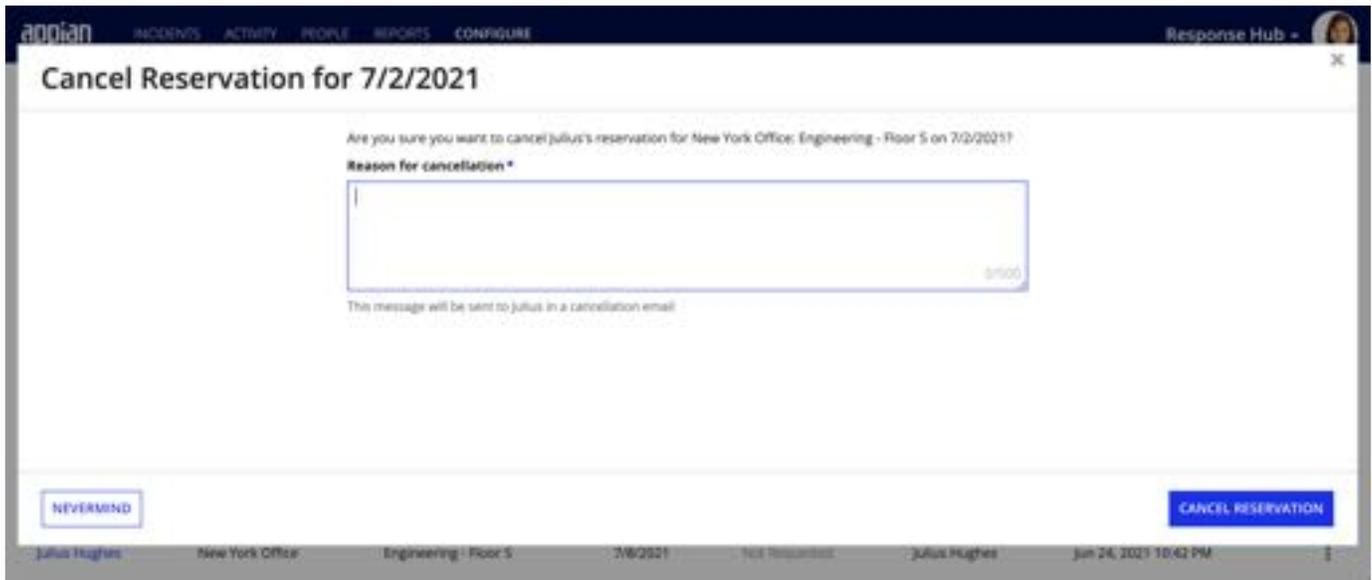
HR & Support - Floor 9 (10 spots available)

CANCEL SAVE CHANGES

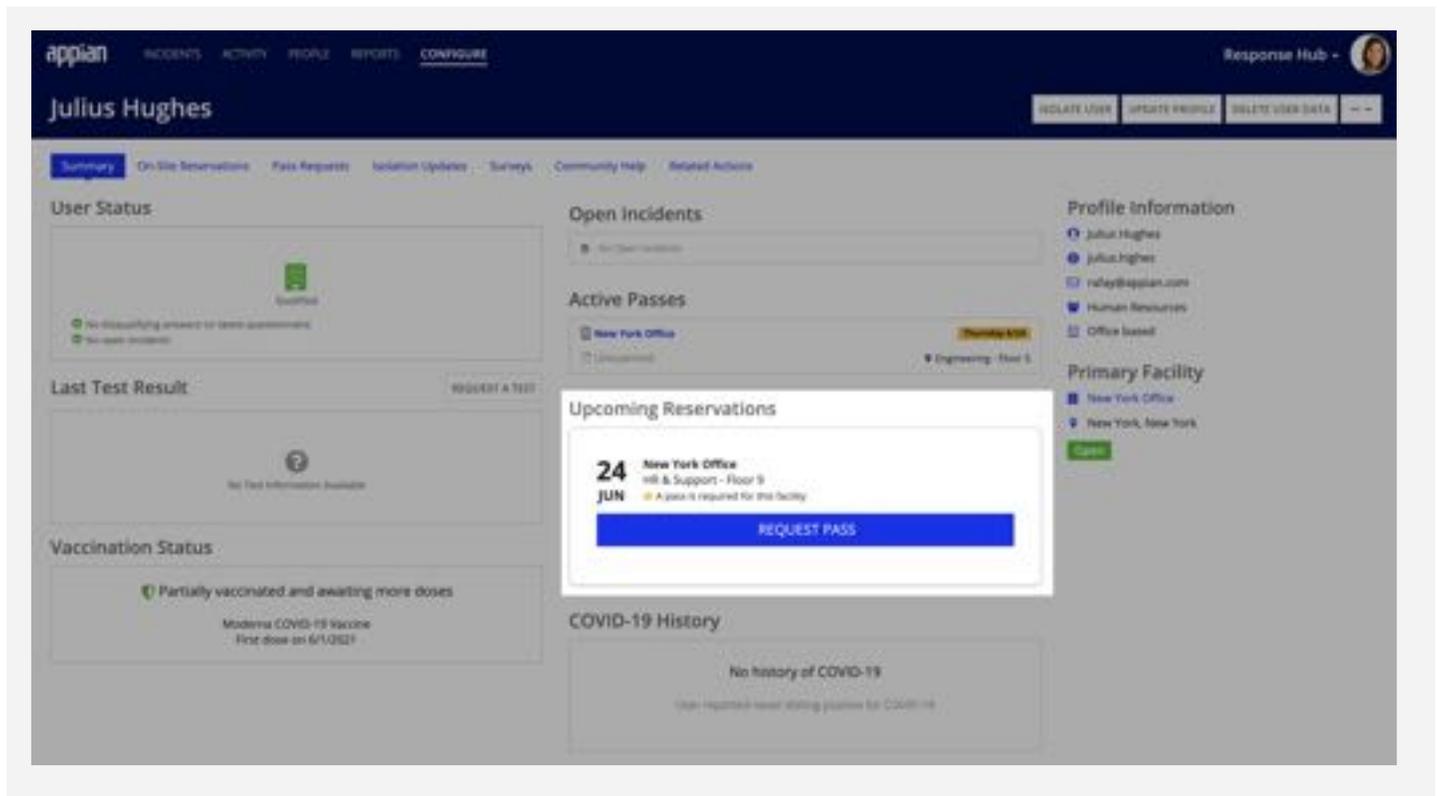
DATE | 06/24/2021 - 09/22/2021 PASS STATUS | Any

A Response Manager can cancel a reservation by selecting the Cancel Reservation action under the ellipsis icon at the end of the reservation row. When canceling a reservation, the response manager must provide a reason for cancellation to include in the email the employee receives notifying them of the change.

After a reservation is canceled, the reserved spot is opened back up for others to reserve. Reservations cannot be canceled on the day of the reservation.



On the day of a reservation, a response manager can request a pass on behalf of an employee from the People record. Workforce Safety allows response managers to answer the pass request questions on behalf of the employee so the employee can receive a pass.



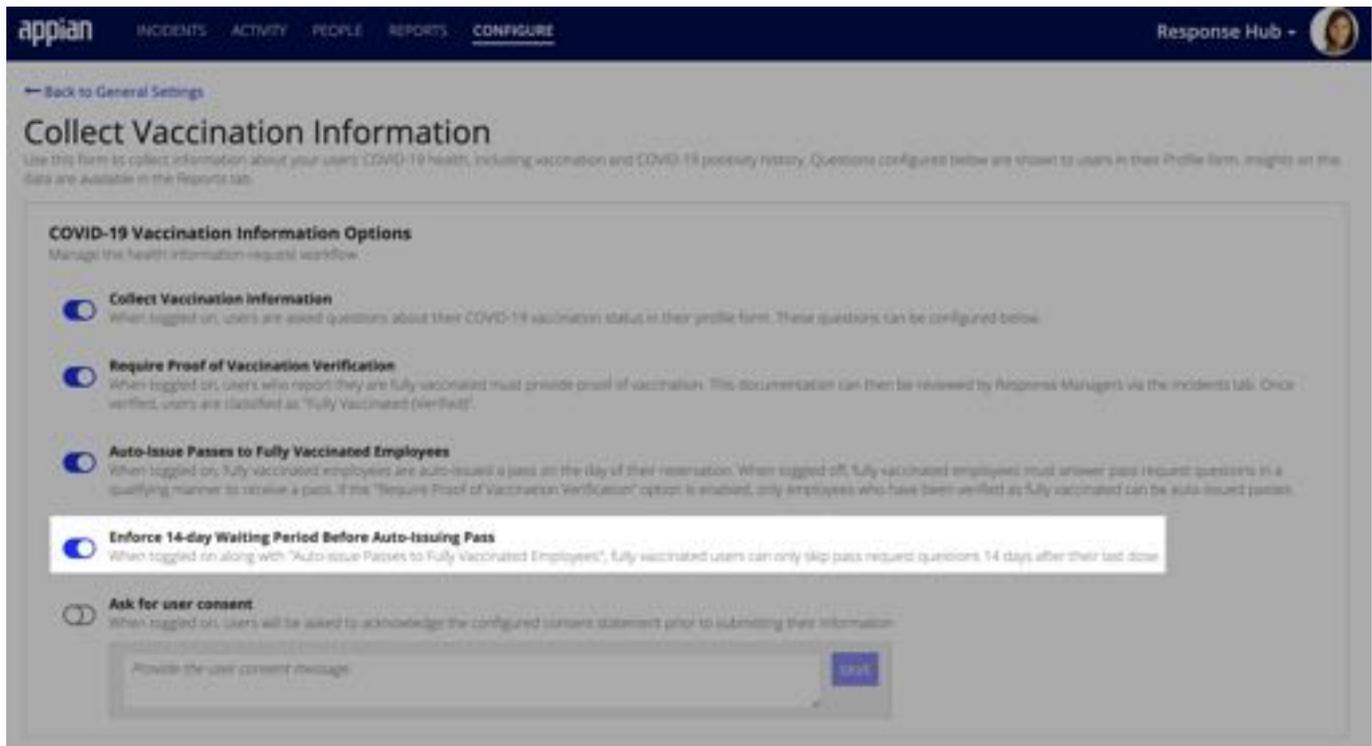
To manage data, you can configure an archival period for on-site reservations from the existing **Data Management** view on the **CONFIGURE** page. Note that when you delete a user's data via the Delete User Data action, on-site reservations are also deleted.

Accessibility Improvements

Accessibility improvements have been made for the mobile app user experience. Visually-impaired users can now more easily use screen readers to complete actions in the mobile app.

2-Week waiting period for vaccinated employees

We've added a toggle to enforce a 2-week waiting period before special permissions, such as skipping pass request questions or being auto-issued passes, go into effect. You can only enable this toggle if you're asking your employees the Dose Date question. After the toggle is enabled, employees will only be given special permissions once 14 days have elapsed from their last dose date.



The screenshot shows the Appian interface for configuring vaccination information collection. The page title is "Collect Vaccination Information" and it includes a "Back to General Settings" link. The main content area is titled "COVID-19 Vaccination Information Options" and contains the following settings:

- Collect Vaccination information**: When toggled on, users are asked questions about their COVID-19 vaccination status in their profile form. These questions can be configured below.
- Require Proof of Vaccination Verification**: When toggled on, users who report they are fully vaccinated must provide proof of vaccination. This documentation can then be reviewed by Response Managers via the incidents tab. Once verified, users are classified as "Fully Vaccinated (Verified)".
- Auto-Issue Passes to Fully Vaccinated Employees**: When toggled on, fully vaccinated employees are auto-issued a pass on the day of their reservation. When toggled off, fully vaccinated employees must answer pass request questions in a qualifying manner to receive a pass. If the "Require Proof of Vaccination Verification" option is enabled, only employees who have been verified as fully vaccinated can be auto-issued passes.
- Enforce 14-day Waiting Period Before Auto-Issuing Pass**: When toggled on along with "Auto-issue Passes to Fully Vaccinated Employees", fully vaccinated users can only skip pass request questions 14 days after their last dose. This option is currently highlighted with a white background.
- Ask for user consent**: When toggled on, users will be asked to acknowledge the configured consent statement prior to submitting their information.

At the bottom of the configuration area, there is a text input field labeled "Provide the user consent message" and a blue "SAVE" button.

Show guidelines to visitors

We've also added a toggle to display guidelines to external visitors. When enabled, both internal employees as well as external visitors will see your configured guidelines.

appian INCIDENTS ACTIVITY PEOPLE REPORTS CONFIGURE Response Hub 

[← Back to General Settings](#)

Manage Guidelines

Add new guidelines that can be displayed to internal users after requesting a pass, or make existing guidelines active or inactive. When you configure the pass request questions, these are the guidelines that you can choose to display for each question response.

Display guidelines to visitors
When toggled on, guidelines are displayed to both internal users and visitors.

These are the guidelines available for selection when offering advice after a user finishes their pass request.

Guidelines	Active
Wash your hands often with soap and water for at least 20 seconds	<input type="checkbox"/>
Avoid touching your eyes, nose, and mouth	<input type="checkbox"/>
Avoid close contact with people who are sick	<input type="checkbox"/>
Keep 6 feet between yourself and others	<input type="checkbox"/>
Wear a mask covering your nose and mouth when out in public	<input type="checkbox"/>
Clean and disinfect frequently touched surfaces daily	<input type="checkbox"/>
Discuss with your healthcare provider on whether it is suitable for you to return to work at this time	<input type="checkbox"/>

[+ Add a Guideline](#)

Other Changes

- All fields that refer to a facility now link to the respective facility record.
- New, updated UI and mobile app illustrations. SVG and PNG versions of these illustrations are available.
- The section of end-user profile form for reporting vaccination information now has usability enhancements.
- The "Can you work from home?" question has been removed from the Profile form to reduce user confusion. Now, all users will see the "Stay Home" message in their landing page when isolated, instead of the "Work from Home" message. The data related to this question is still preserved in the database.

Release History

The following support information applies to Workforce Safety. To upgrade to Workforce Safety version 12.0, see the [version 12.0 upgrade guide](#).

Release	Release Date	Supported Platform	Expiration Date
14	28 Feb 22	21.4 +	28 Feb 23
13	22 Dec 21	21.3 +	22 Dec 22
12	2 Jul 21	21.2 +	2 Jul 22
11	23 Apr 21	21.1 +	25 Oct 21
10	12 Mar 21	20.4 +	12 Sep 21
9	12 Feb 21	20.4 +	12 Aug 21
8.1	15 Jan 21	20.4 +	15 Jul 21
8	18 Dec 20	20.4 +	18 Jun 21

7	13 Nov 20	20.3 + (Hotfix B)	13 May 21
6	16 Oct 20	20.3 + (Hotfix B)	16 Apr 21
5	11 Sep 20	20.3 +	11 Mar 21
4	14 Aug 20	20.1 +	16 Oct 20
3.1	9 Jul 20	20.1 +	14 Sep 20
3	19 Jun 20	20.1 +	14 Sep 20
2	15 May 20	20.1 +	14 Aug 20
1	1 May 20	20.1 +	15 May 20

Solution Support

In addition to the Workforce Safety release notes and product documentation, Appian's Solutions Support team provides a number of services to ensure the success of your Workforce Safety solution. See the [Solution Support Guide](#) for more information.

See [Workforce Safety 11.0 Release Notes](#) for **What's New** features in the previous release.

Installation Guide

Introduction

Workforce Safety helps organizations manage crises, such as the COVID-19 pandemic. This page provides instructions for installing Workforce Safety in an Appian environment.

To update to v12.0 of Workforce Safety, see the [version 12.0 upgrade guide](#). Note that you must be registered on Appian Community to access this link.

This solution may involve collection and dissemination of Personal Health Information. Please follow your organization's guidelines for handling of Personal Health Information under HIPAA. Appian recommends installing this app on Appian's HIPAA Cloud sites.

Technical support

Please call our dedicated Workforce Safety solution help line at the numbers below if at any point you need assistance or have questions:

- US: +1 (703) 420-1311
- AUS: +61 285034152
- UK: +44 20 3929 3748

Current customers can also log into Appian Community and open support cases. All users of Workforce Safety can also email Appian Support at support@appian.com.

System requirements

- Appian 21.2 or later. Appian HIPAA Cloud is recommended to ensure potential sensitive user health data is protected.
- A supported version of a [MariaDB database](#) as a business data source.
 - **Note:** Instructions below are tailored for MariaDB databases. For use with other databases, the SQL scripts used in Step 3 will need to be modified.
- A supported [web browser](#).

If you intend to run both Appian's Workforce Safety and CampusPass solutions, you will need to install them on separate environments. We also strongly recommend using a standalone environment for the solution, separate from your other Appian

Step 1: Download software package

This package contains the following files:

- Application Zips:
 - Workforce Safety v12.0.zip
- SQL Files
 - Workforce-Safety-v12.0-Solution-Master-SQL-Script.sql

To download the software package (as an existing Customer or Partner):

1. Go to the **SUPPORT** tab on [My Appian](#).
2. Click the **DOWNLOADS** tab.
3. Click **SOLUTIONS**.
4. Find and open "Workforce Safety Solution v12.0".
5. Download the software package.

Step 2: Deploy Plug-ins

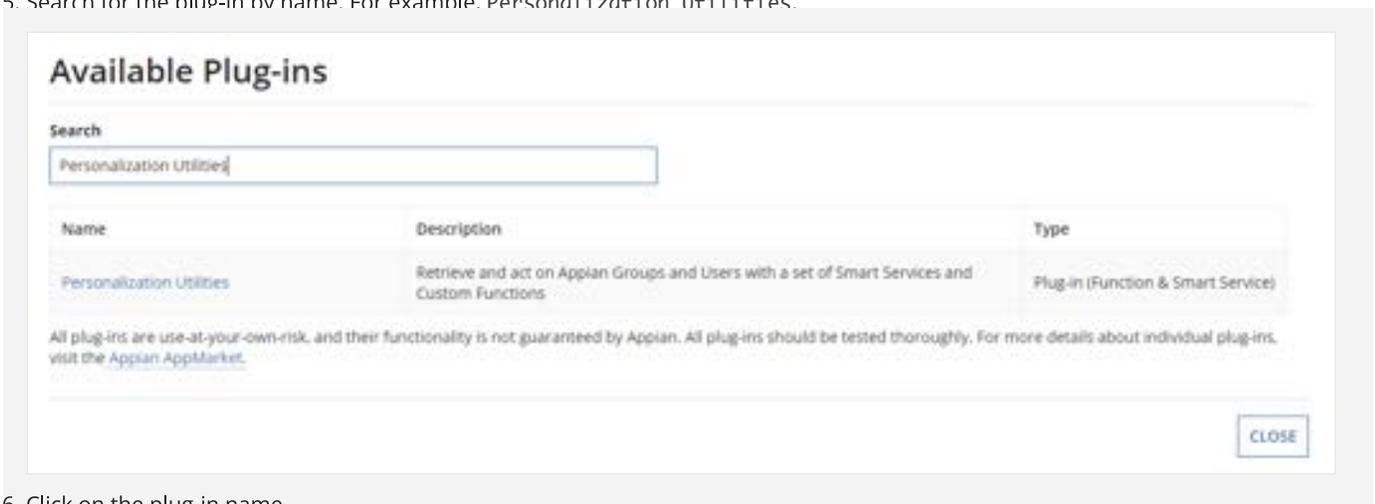
Workforce Safety relies on the following plug-ins to be deployed and configured in the target system before the application files can be imported:

- [Personalization Utilities](#) (v3.7.1)
- [Regular Expression Functions](#) (v2.1.2)
- [Barcode and QR Code Utilities](#) (v1.0.0)
- [Execute Stored Procedure](#) (v1.5.3)
- [Appian Solutions Plug-in](#) (v1.10.1)
- [Content Tools](#) (v1.3.0)

Appian Cloud Environments

To deploy the plug-in for an Appian Cloud environment:

1. In the target environment, log in as the deployment user.
2. Navigate to the **Admin Console**.
3. On the left side of the console, click **Plug-ins**.
4. Click **ADD PLUG-INS**.
5. Search for the plug-in by name. For example, [Personalization Utilities](#).



6. Click on the plug-in name.

7. Click **DEPLOY**.

The screenshot shows a dialog box titled "Personalization Utilities". At the top, a light blue banner contains the text: "Re-deploying plug-ins that are already enabled on this site could take up to a few minutes." Below this, the dialog is split into two columns. The left column lists various utilities and their descriptions, including "Rename Custom Group", "Create Custom Title", "Deactivate Users", and "Import Users from CSV Smart Service". The right column displays metadata: "Contributed By" (mike.cichy), "Component Type" (Plug-in (Function & Smart Service)), "Version" (3.7.0), and "Last Updated" (2020-11-10). At the bottom, there are two buttons: "CANCEL" on the left and "DEPLOY" on the right.

8. Repeat steps 4-7 for the remaining plug-ins listed above.

Self-Managed Environments

To deploy the plug-ins for a self-managed environment, follow the [Deploying Plug-ins](#) instructions. The plug-in files can be retrieved from the AppMarket links above.

Step 3: Create database objects

In order to create the structure for the database tables, views, and other objects that are a part of Workforce Safety, you will need to run DDL scripts in your database.

1. In your Appian-provisioned cloud database, select the Appian (or desired target) database.
2. Import the `Workforce-Safety-v12.0-Solution-Master-SQL-Script.sql`, which was downloaded in [Step 1](#).

Step 4: Import the application files

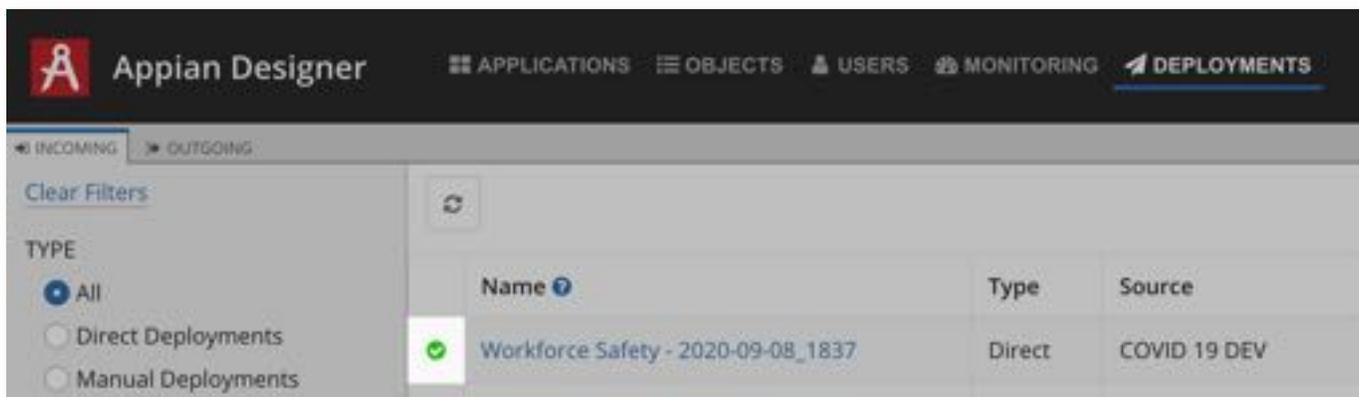
Import the application files into the target environment.

1. In the target environment, log in as the deployment user.
2. Navigate to the Appian Designer.
3. Click **IMPORT**.
4. Click **UPLOAD** and choose the `Workforce Safety Solution v12.0.zip` file that was downloaded in [Step 1](#).
5. Click **IMPORT PACKAGE**.
 - o **Note:** The import may time out due to file size, but import will continue in the background.
 - o **Note:** If the business database is not called Appian, a warning will occur when importing the data stores. To fix this, after the import is complete, open each data store object and update the Data Source dropdown list to point to the Appian business database. Then simply save and publish the Data store.

To check the status of the import:

1. In Appian Designer, go to the **Deployments** tab.

- When the deployment has been completed and is successful, a green circle will display. If there is an error, a red circle will display. Click the deployment link for further information.



Step 5: If your environment uses Tempo, add necessary users to the Tempo Users group

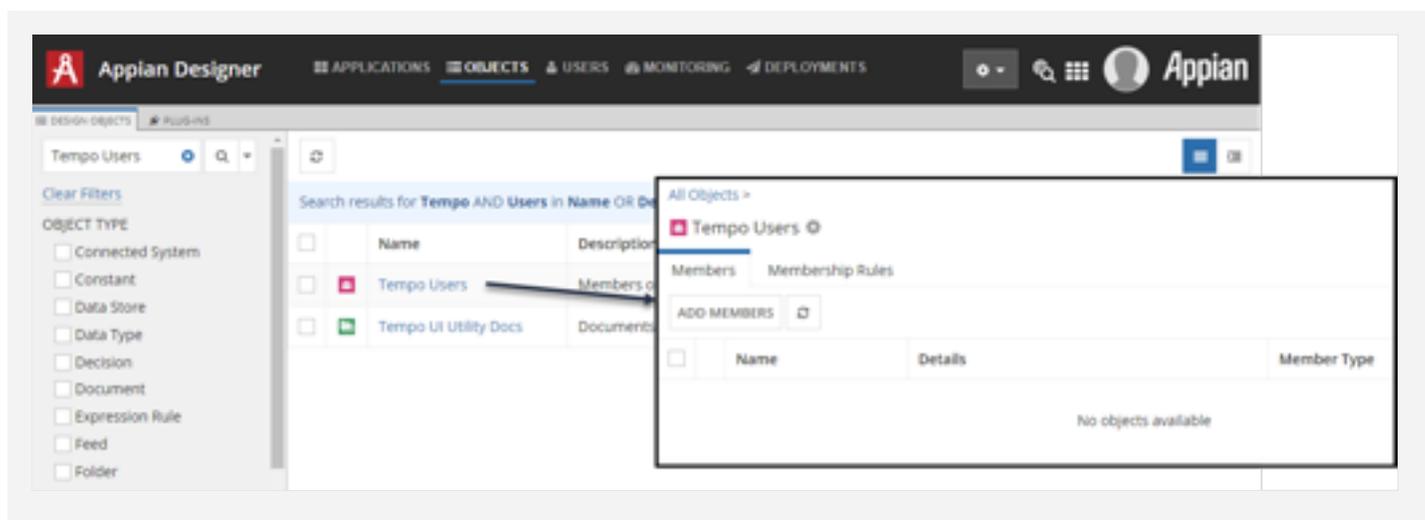
If Workforce Safety is the only application in your environment, or Tempo is not used by your organization, this step can be skipped.

Tempo access is restricted across the environment. By default, users are not members of the Tempo Users group.

This prevents external visitors and those within your organization from achieving broader access to the environment than they need. Additionally, Workforce Safety does not require Tempo for any of its functionality.

If you require particular users or groups to have Tempo access, you can add select members or groups to the Tempo Users group:

- In your Appian environment, log in as a designer.
- In the top-right corner of the page, go to the navigation menu and select **Appian Designer**.
- Click **Objects**.
- In the search box, search for Tempo Users group.
- Select the Tempo Users group and add members as needed.



We encourage you to only add members who need access to Tempo. Refrain from using a membership rule that adds all users in the environment.

Next steps

After you are finishing installing the application, follow the [Setup Guide](#) to complete the solution set up.

If your database name is not `Appian`, be sure to follow the instructions in the Setup Guide to [update the database constant](#).

Setup Guide

Introduction

After you have [installed](#) or received your Workforce Safety site, there are a few steps to take to quickly get up and running with it.

This page walks you through the remaining steps to set up Workforce Safety.

If you face any issues along the way, please contact our Workforce Safety solution support team.

Reach us by phone:

- Americas: +1 (703) 420-1311
- APAC: +61 285034152
- EMEA: +44 20 3929 3748

Reach us by email: support@appian.com

If you make any changes to Workforce Safety that are not outlined in the Workforce Safety documentation on this site, you may not be able to upgrade or hotfix the solution without losing the changes. This includes any changes to the database. Please contact our Workforce Safety support team with any questions about this.

Step 1: Set up admin users

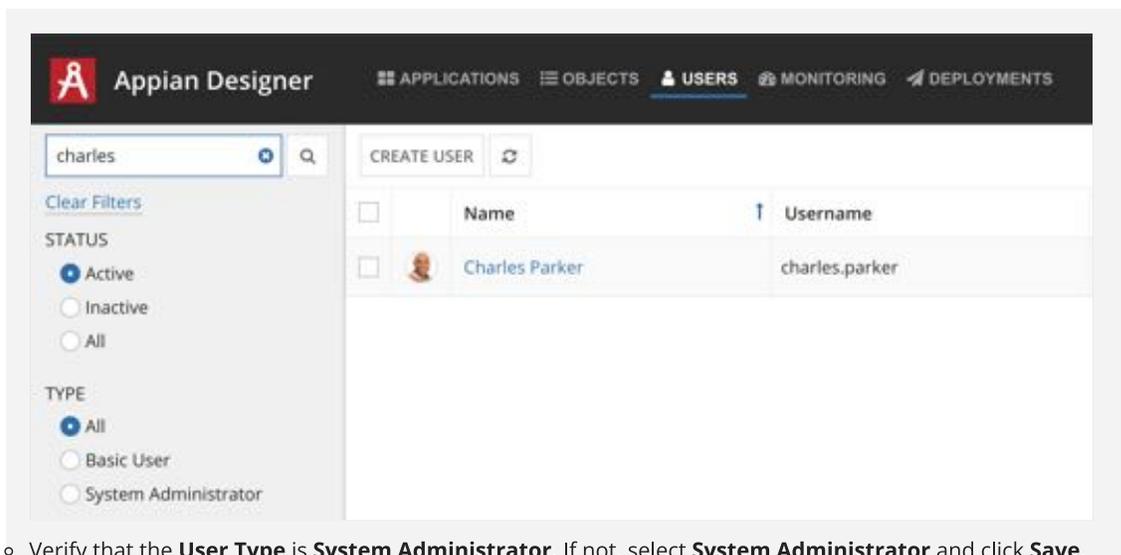
Users that you want to act as administrators should be added to the administrators group. This group receives emails when there are errors in the solution processes so that they can monitor and respond to these errors.

In order to manage users and groups that control access to Workforce Safety, these users should also be System Administrators. System Administrators are users that can manage users and have access to the [Admin Console](#) and [Appian Designer](#).

To restrict access to sensitive information, members of the administrators group do not have access to the content on the [Response Hub](#), even though they can see it. See the [Groups Reference Page](#) for more information about the access that members of each group have.

To set up admin users as System Administrators and add them to the administrators group:

1. In your Appian environment, log in as a system administrator.
2. In the top-right corner of the page, go to the navigation menu and select **Appian Designer**.
3. Make sure that the **User Type** for the admin user is **System Administrator**.
 - Go to the **Users** tab.
 - Find and open the user.



- Verify that the **User Type** is **System Administrator**. If not, select **System Administrator** and click **Save**.

User Properties

Charles Parker has no active tasks

Profile

Username charles.parker (Change)

* First Name Charles

* Last Name Parker

Nickname

Supervisor

Title Select existing Create new None

Security

* User Type Basic User System Administrator
Changes will take effect when the user next logs in

Contact

* Email charles.parker@app.com Mobile Phone

CANCEL SAVE

4. Add admin users to the administrators group.
 - Go to the **Applications** tab and open the **Workforce Safety** application.
 - Find and open the Workforce Safety Administrators group.

CampusPass OBJECTS MONITORING DEPLOYMENTS

Name or descriptor Q

NEW ADD EXISTING

Clear Filters

OBJECT TYPE

- Connected System
- Constant
- Data Store
- Data Type
- Decision
- Document
- Expression Rule
- Feed
- Folder
- Group

<input type="checkbox"/>	Name
<input type="checkbox"/>	Workforce Safety Response Managers
<input checked="" type="checkbox"/>	Workforce Safety Administrators
<input type="checkbox"/>	Workforce Safety Command Center
<input type="checkbox"/>	Language Users
<input type="checkbox"/>	Language Administrators
<input type="checkbox"/>	Workforce Safety Users
<input type="checkbox"/>	Workforce Safety Facilities Managers

- Click **ADD MEMBER**.
- Use the **Users to Add** picker to select the user or users, and click **ADD**.

Add Group Members

Choose the groups and users to add as members of the Workforce Safety and Readiness Administrators group

Groups to Add

Select one or more groups

Users to Add

Charles Parker X

CANCEL ADD

Step 2: Update Admin Console settings

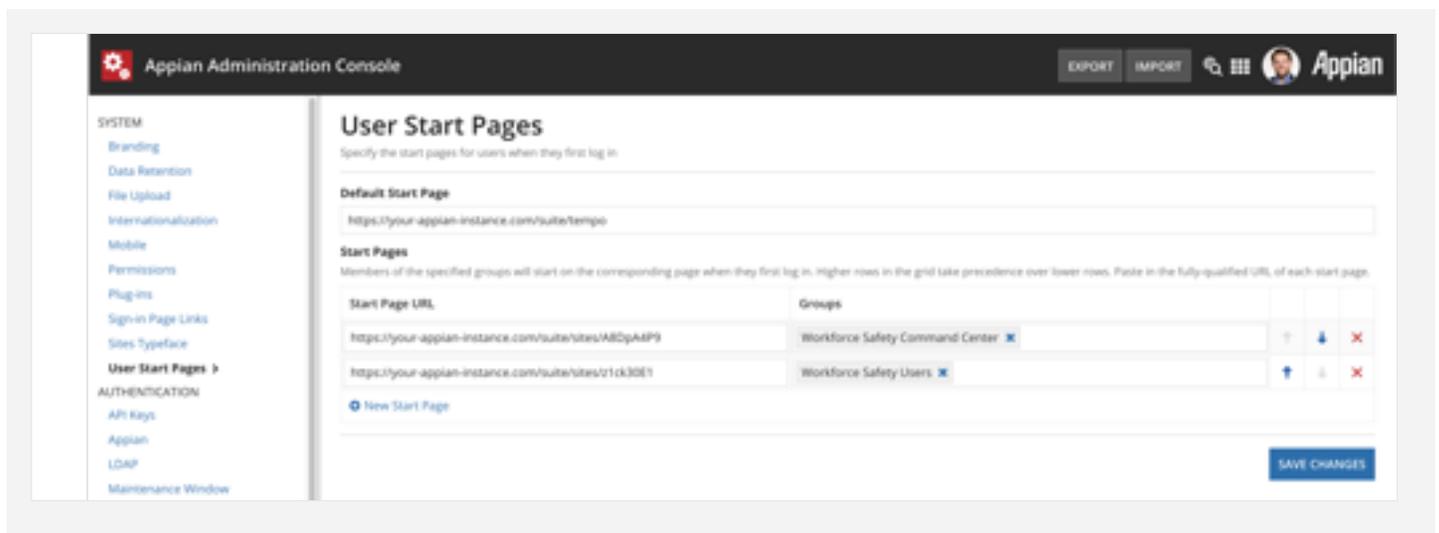
You will need to update several settings in the [Admin Console](#), including setting the user start pages and default language. We also recommend turning on the **Prompt Users to Download App** setting in order to provide a quick way for users to download the mobile app.

Setting the user start page

A [user start page](#) is the default page that displays for users when they first log in to Appian. If your users will use Workforce Safety as their primary Appian site, we highly recommend setting the user start page for all of your users to either the **COVID-19 Workforce Safety** site or the **Response Hub** site.

To set the user start page:

1. In your Appian environment, log in as a system administrator.
2. In the top-right corner of the solution, go to the navigation menu and select **Admin Console**.
3. Under **SYSTEM**, select **User Start Pages**.
4. Set the user start page for **Response Hub** users.
 - Click **New Start Page**.
 - For **Start Page URL**, enter the URL for the Response Hub: `https://your-appian-instance.com/suite/sites/A8DpA4P9`. Replace `your-appian-instance.com` with your site URL.
 - For **Groups**, use the picker to select the Workforce Safety Command Center.
5. Set the user start page for employees.
 - Click **New Start Page**.
 - For **Start Page URL**, enter the URL for the Workforce Safety site: `https://your-appian-instance.com/suite/sites/z1ck30E1`. Replace `your-appian-instance.com` with your site URL.
 - For **Groups**, use the picker to select the Workforce Safety Users.
6. Click **SAVE CHANGES**.



If the `https://your-appian-instance.com/suite/tempo/news` site displays when a user logs in, they can go to the Workforce Safety site by clicking > **COVID-19 Workforce Safety** or **Response Hub**.

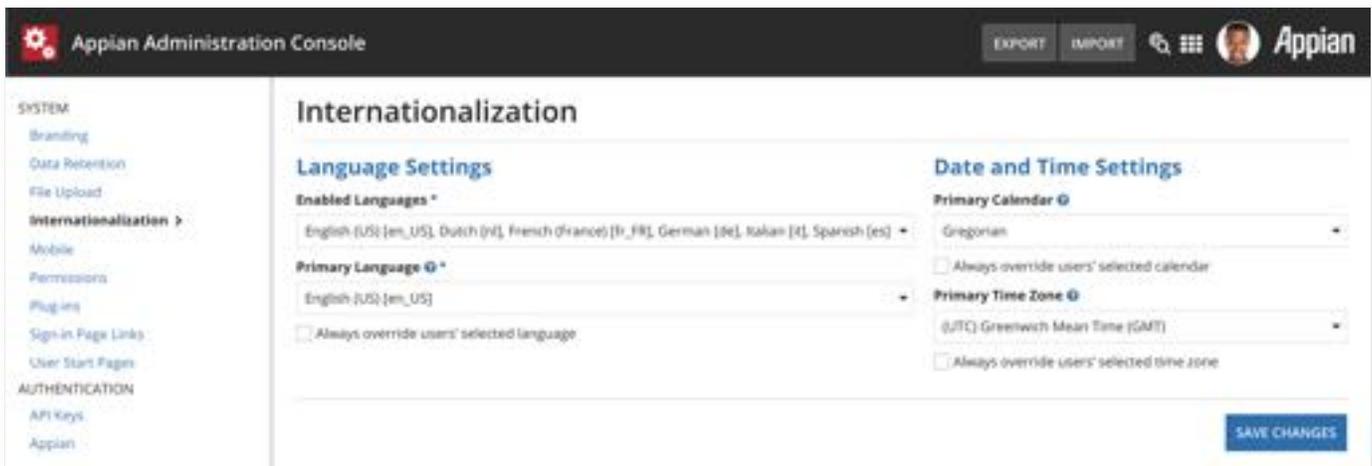
Setting the default language

If you want users set their default language to one of the multiple languages supported by Workforce Safety, you will need to set the language settings in the Admin Console. See [Internationalization](#) for more information on language settings.

If you only need to display the solution in English, you can skip this step.

To set the language settings:

1. In the **Admin Console**, under **SYSTEM**, select **Internationalization**.
2. For **Enabled Languages**, select one or more of the following supported languages.
 - English (US) [en_US]
 - Dutch [nl]
 - French (France) [fr_FR]
 - German [de]
 - Italian [it]
 - Spanish [es]
3. Click **SAVE CHANGES**.



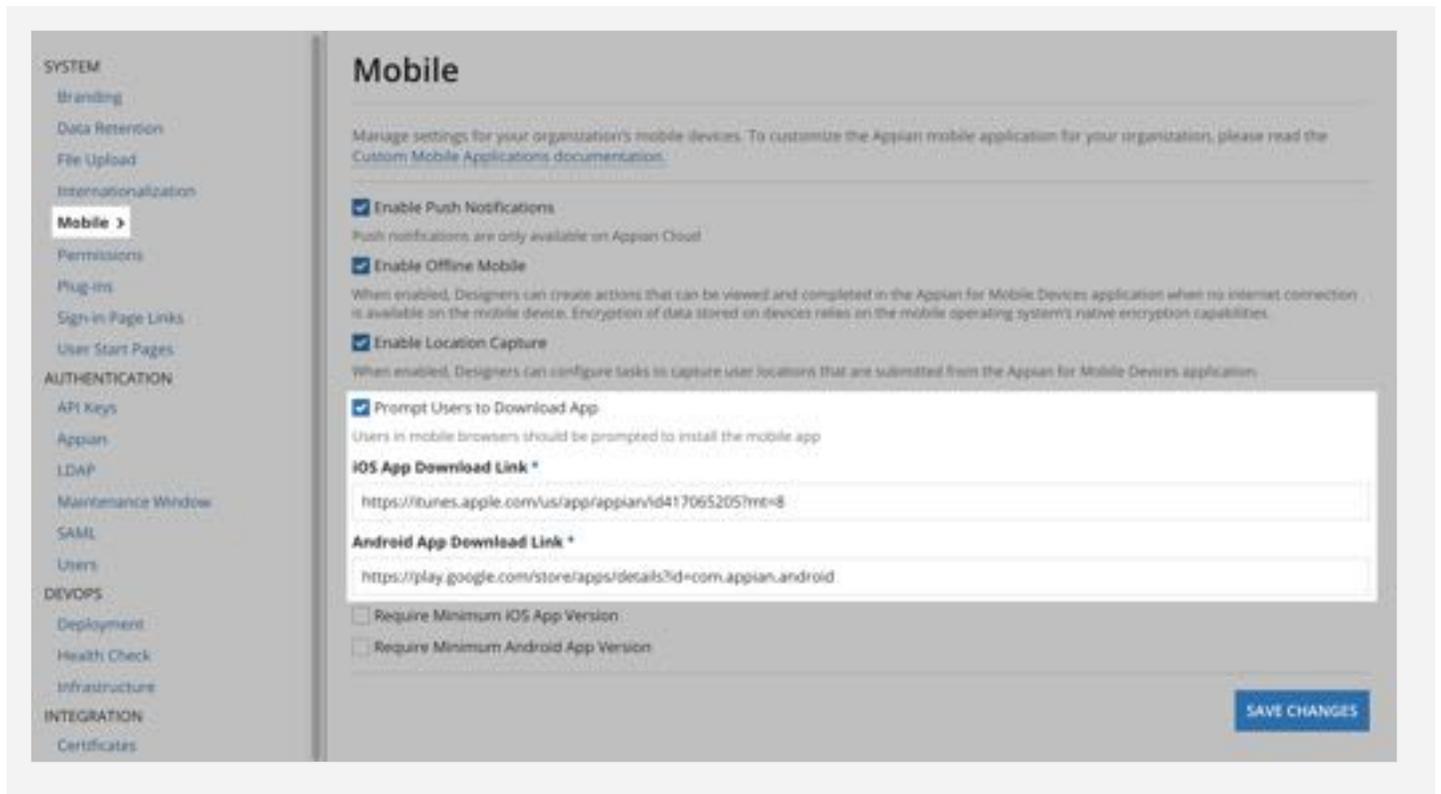
Turn on the Prompt Users to Download App setting

On mobile devices, Workforce Safety works best in the Appian mobile app, instead of a mobile browser. Some organizations may even decide to create their own [custom version of the Appian application](#) with their own branding.

Whatever your case is, to help drive mobile app adoption, and create a better mobile experience for users, we recommend turning on the **Prompt Users to Download App** setting in the Admin Console mobile settings. Enabling this setting will prompt users to download the mobile app when they access Workforce Safety from a mobile browser.

To turn on the Prompt Users to Download App setting:

1. In the **Admin Console**, under **SYSTEM**, select **Mobile**.
2. Select **Prompt Users to Download App**. The default links to download the Appian app for iOS and Android are entered automatically.
3. If you are using a custom mobile app that you would like your users to download, enter the link to these apps in the **iOS App Download Link** and the **Android App Download Link** fields.
4. Click **SAVE CHANGES**.



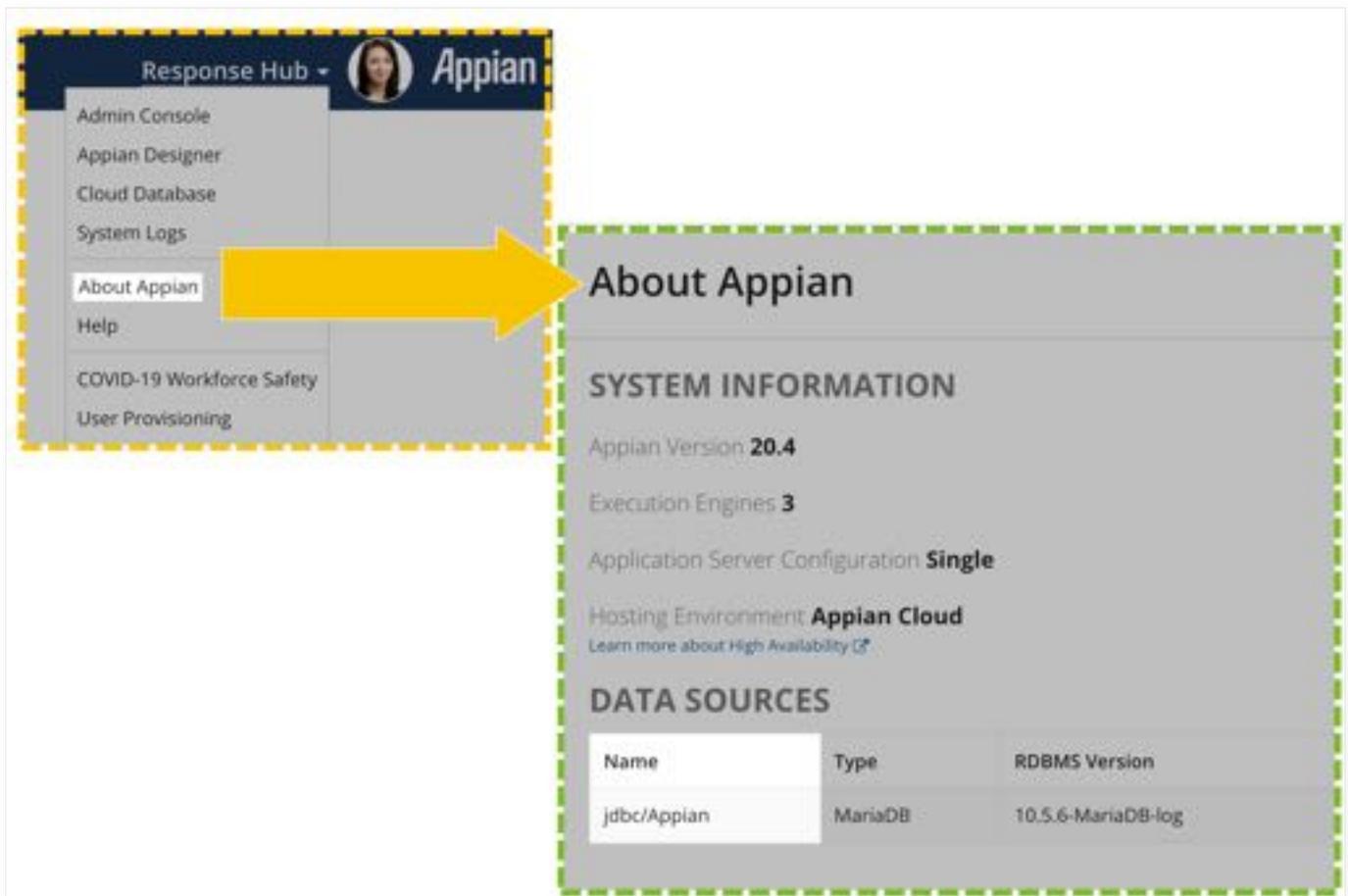
Step 3: If the database name is not Appian, update the database constant

The Workforce Safety application contains an object called a constant that tells the application what the name of your database is.

First, you need to determine what the name of your database is. If it isn't jdbc/Appian, you will need to update the constant so that it uses your database's name.

To determine the name of your database:

1. In your Appian environment, log in as a system administrator.
2. In the top-right corner of the solution, go to the navigation menu and select **About Appian**.
3. In the **Data Sources** section, find the **Name** of the database.
4. If the name is `jdbc/Appian`, you can skip to [Step 4](#). If it isn't, write down the database name and continue with this section.



The screenshot shows the Appian Response Hub navigation menu on the left, with a yellow arrow pointing to the 'About Appian' page on the right. The 'About Appian' page displays system information and data sources.

SYSTEM INFORMATION

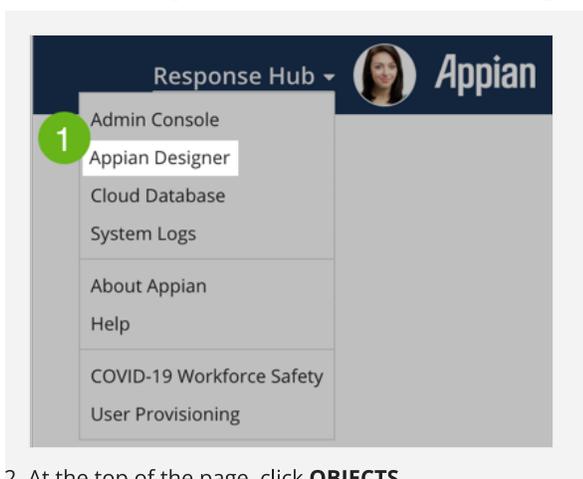
Appian Version **20.4**
Execution Engines **3**
Application Server Configuration **Single**
Hosting Environment **Appian Cloud**
Learn more about High Availability 

DATA SOURCES

Name	Type	RDBMS Version
jdbc/Appian	MariaDB	10.5.6-MariaDB-log

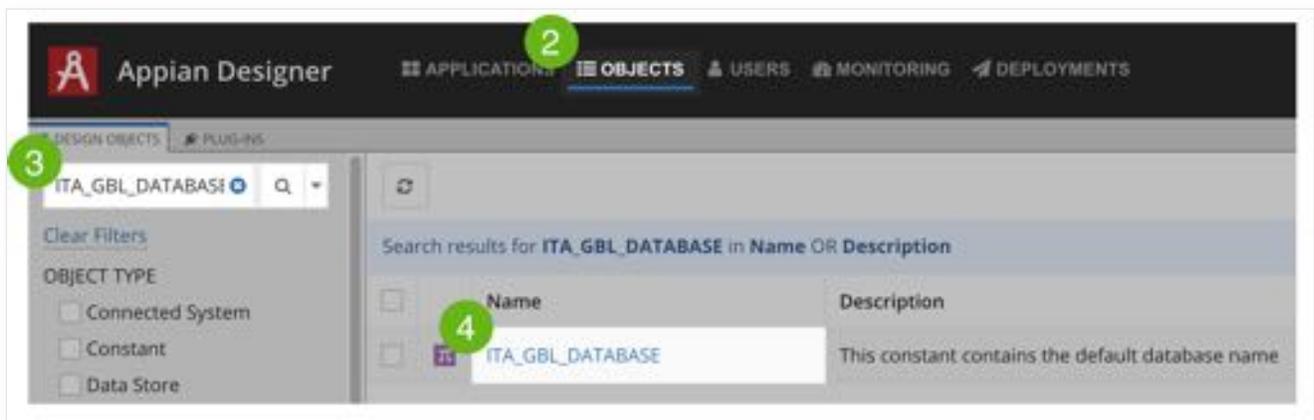
To update the name of the database in the constant:

1. Go to the navigation menu and select **Appian Designer**.

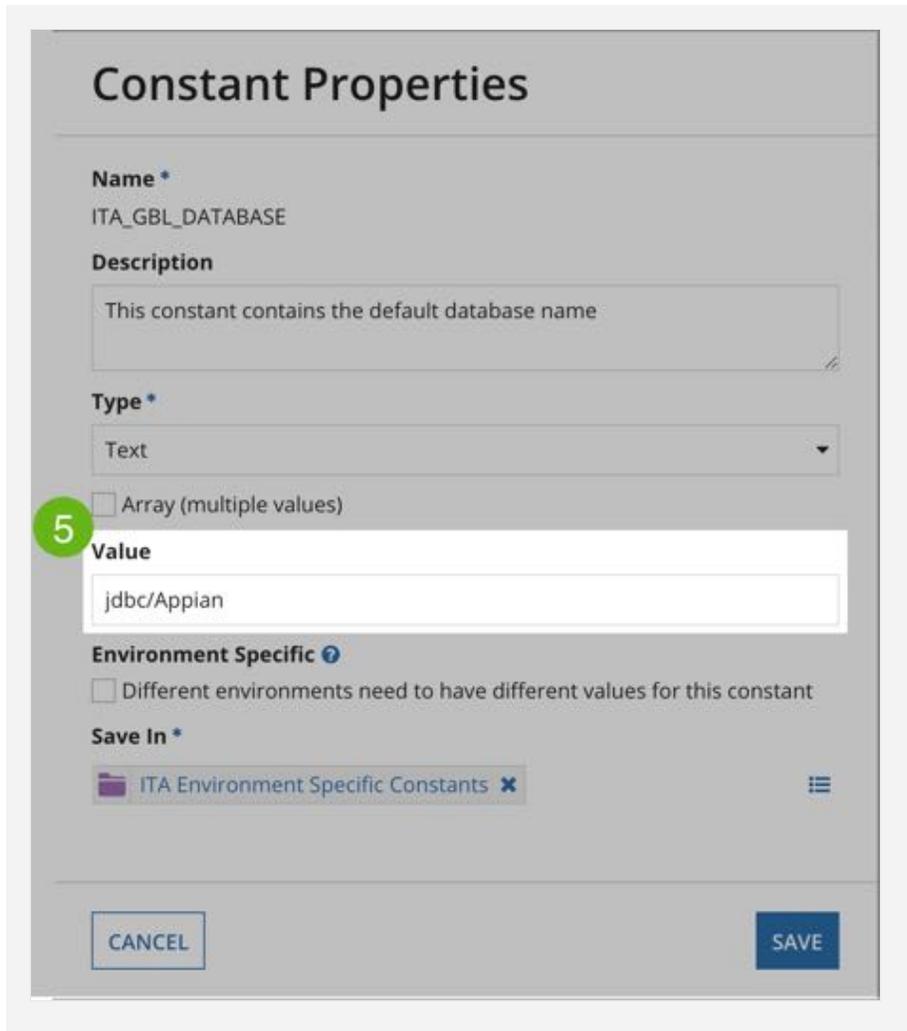


The screenshot shows the Appian Response Hub navigation menu with 'Appian Designer' highlighted. A green circle with the number '1' is placed next to the 'Appian Designer' menu item.

2. At the top of the page, click **OBJECTS**.
3. Search for `ITA_GBL_DATABASE`.
4. Click `ITA_GBL_DATABASE` to edit the constant.



5. In the **Value** field, update the name to match the data source name from the About Appian dialog box and click **SAVE**.

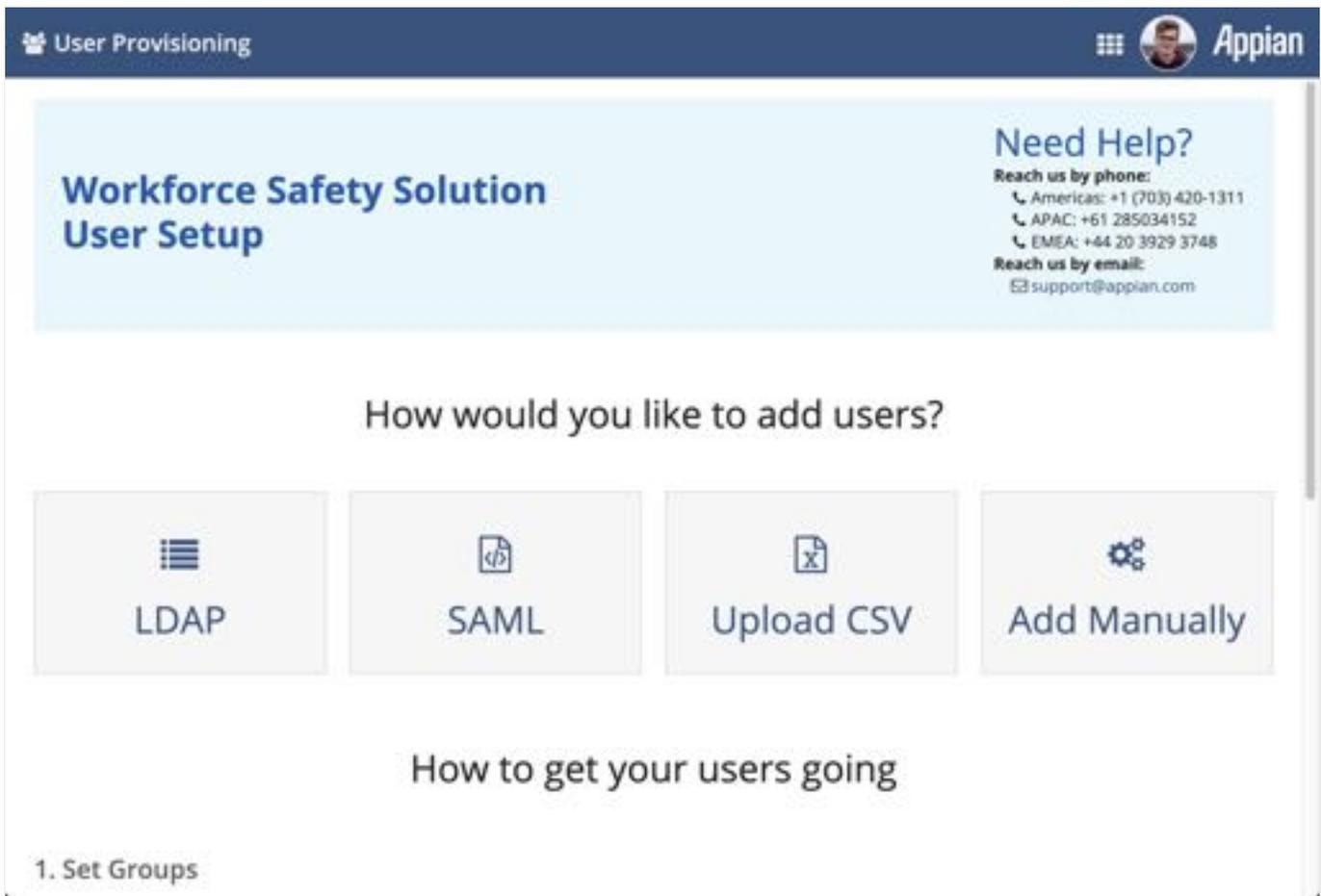


Step 4: Add users and assign to groups

You likely have a lot of users to add to the Workforce Safety solution, so we give you several methods of adding your users: LDAP, SAML, CSV, or manual entry.

To get started adding users, in the top-right corner of the solution, go to the navigation menu and select **User Provisioning**. This site guides you through adding users using which ever way works best for your organization.

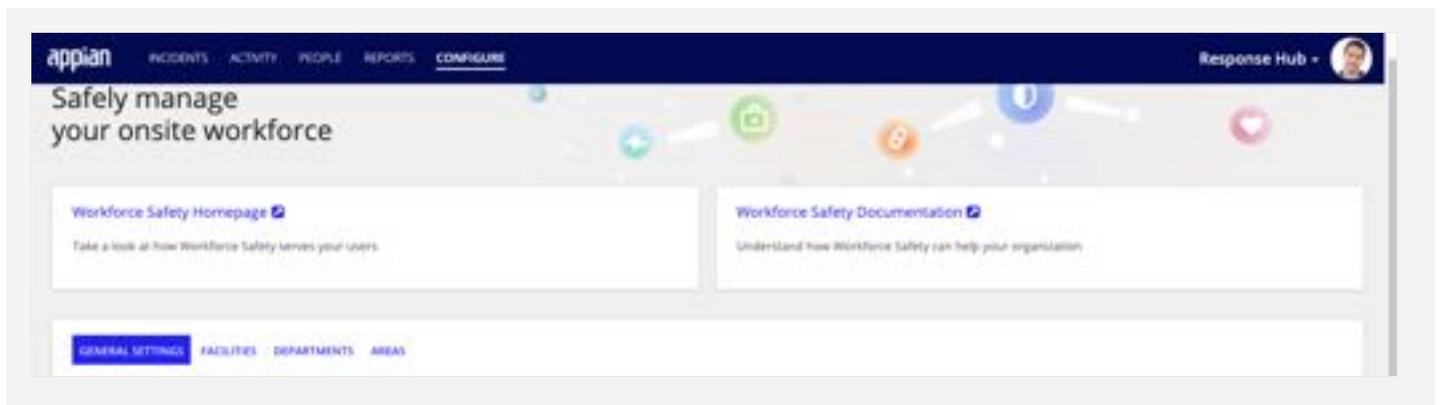
After you are done adding users, follow the instructions on the site to add users to groups to grant them access to the parts of the solution they will need.



Step 5: Configure the site for your organization

After you've added members to the response managers group, they can log in and customize with information relevant to your organization.

Follow the instructions on the [Configure the Site](#) page to configure Workforce Safety.



Step 6: Launch solution

Once all of the above steps are complete, you can notify your users to start using Workforce Safety. Reach out to Appian Support at any time if you have any questions.

Mobile Device Setup

Introduction

The Workforce Safety home page is optimized for mobile use. This provides the flexibility for end users to request a pass, report an incident, view announcements and much more, directly from their mobile device.

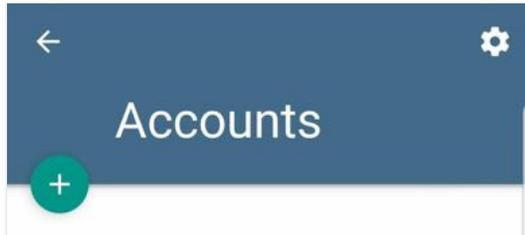
This page provides instructions for how to download and set up the mobile Appian application to use Workforce Safety.

Accessing Workforce Safety on a mobile device

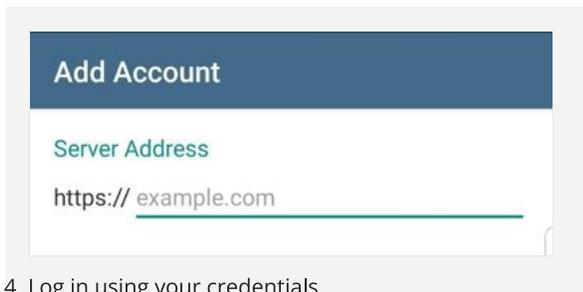
In order to use Workforce Safety on your mobile device, download the Appian application on your phone.

To download and set up the Appian mobile application:

1. From the Apple App Store or Google Play store, download and open the **Appian** application.
2. Click the + icon to add a new account.



3. Enter site name in the **Server Address** field.



4. Log in using your credentials.
5. In order to receive important updates from your organization, be sure to enable notifications for the Appian application.

The Response Hub is available on the mobile application, but it is best used on a desktop.

Best Practices for Optimal User Experience

Introduction

Appian Workforce Safety is deployed by large multinational organizations, and Appian is fully scalable to meet the needs of even the largest customer. The Appian Cloud infrastructure that is provided for each customer is sized to support the user population at the time of purchase, assuming [optimal usage](#).

This page defines the best practices for optimizing the user experience through:

- Ensuring that the number of users using Workforce Safety doesn't exceed the optimal number of users that the default infrastructure can handle.
- Implementing a data archival strategy.

If your needs are likely to exceed the optimal usage, contact your account executive to help determine if you will need to upgrade your infrastructure, even if only temporarily.

Optimal usage for Workforce Safety

The upper limit for optimal usage is 1% of your user population requesting a pass during your peak one-minute period. For example, if you have 12,000 users, the infrastructure set up for you can handle 120 users requesting a pass during your busiest one-minute period.

We do not artificially throttle or create waiting rooms for users beyond this recommended limit. This means that if you are using the default infrastructure and you have more users request a pass at one time than the system was designed for, users may see slower response times during these [peak periods](#).

This limit is based on metrics from customers who are using our solution daily across large populations, and it assumes the following:

- The solution has not been customized beyond the configurations documented on this site.
- Pass requests are limited to 10 or fewer questions.

What causes peak periods?

There are likely natural variations for when your user population will be most likely to request a pass. For example, the time that users start work, their commute time, or differences in their time zones could affect the number of users using the site at once. Times when the application is experiencing high user demand are considered peak periods.

There are some actions that could artificially increase the number of users logging in to Workforce Safety at the same time. For example, sending an initial launch message or daily reminder to all users would likely cause an increase of users activity on the site at the same time.

Best practices

Most customers have usage well below 1% during their peak periods without applying additional constraints. However, there are some best practices we recommend that can reduce the chances of exceeding the optimal usage.

Space out notifications

If you decide to send out a regular reminder or initial launch message, consider spacing it out by sending it to different groups at different times. This will decrease the likelihood that many users will try to log in at the same time, possibly resulting in slower response times.

For example, when you initially release Workforce Safety to your users, you can encourage users to request passes just before they leave for work rather than when they get to work. You can also time notifications so that different groups or facilities receive them at different times to reduce the likelihood of a usage surge.

Stagger arrival times to your workplaces

Having your employees arrive to the workplace at different times can reduce peak demand on the system while also preventing large gatherings of people at your site entrances.

Use a phased approach for returning users to the workplace

Allowing employees back to the workplace in stages spreads out user activity. Additionally, a phased approach like this will provide you with a chance to learn from feedback and adjust your approach.

Don't exceed ten questions on your pass request questionnaires

The more questions that you add to your pass request questionnaire, the more time each user spends in the system and the more system resources are needed per user. This impacts both the user experience and how many users the hardware can handle.

By default, pass requests have eight questions. We have found that user experience and system load are better when staying under ten questions for a pass request. If your use case requires more than ten questions, please reach out to your Account Executive to help determine if you need upgraded hardware.

Data archival strategy

To ensure that Workforce Safety continues working with optimal performance and does not encounter slowness due to growing data entries, a data archival strategy is recommended for all customers, especially those with a high load of data entries. Data archival is also recommended once the data is no longer needed for business purposes since the raw data is maintained and can always be accessed from the back-end, after it is archived.

For instructions on how administrators can configure what data is archived and when, see the [Configuration Guide](#).

Recommendations

The following guidance was designed based on load testing analysis completed on standard cloud installations in order to help guide decision-making around when and what to archive if needed.

- **Pass Requests:** It is recommended that this volume does not exceed 500,000 data entries. Since pass requests are generated daily by users, it is recommended to set archival here based on how many pass requests are being generated per week. For example, if users are completing ~125,000 pass requests per week, we suggest archiving at 30 days.
- **Surveys:** It is recommended that this volume does not exceed 100,000 data entries. Since surveys are generally only created one time per user, it is recommended that you archive surveys if you approach the recommended limit, as well if the data is no longer needed for business purposes.
- **Isolation Updates:** It is recommended that this volume does not exceed 100,000 data entries.
- **Incidents:** It is recommended that this volume does not exceed 100,000 data entries.

- **Tests:** It is recommended that this volume does not exceed 100,000 data entries.
- **Log Contacts:** It is recommended that this volume does not exceed 1,000,000 data entries.
- **On-Site Reservations:** It is recommended that this volume does not exceed 1,000,000 data entries.

When evaluating data volume for archival, consider the following:

- The number of data entries currently in the system. This information can be found in the Data Management configuration page.
- The expected future usage that will cause data entries to exceed the recommended amount.

This guidance is designed with the intention of minimizing potential performance degradation. It does not necessarily need to be strictly followed, but should be considered along with your business needs. If you are not experiencing any performance issues with your current data volumes, you may not need to configure archiving for every data category at this time.

For customers who have heavy usage and require maintaining data volumes that are larger than the figures provided in the guidance, we recommend adjusting the archival periods based on the performance of the environment. For example, if you are experiencing slow load times of certain pages, such as the Pass Request report, consider archiving that functional data at a shorter interval. Contact technical support if further assistance is needed.

Overview

How do I tailor a solution for my needs?

There are several activities that can be performed to tailor a solution to meet the specific needs of your organization. The table below describes the difference between a configuration and customization activity, and where to perform each type of activity within the solution.

Activity	Description	Where is it Performed?
Configuration	Adapting a solution for a range of scenarios by modifying the solution's out-of-the-box, front-end settings. Configurations do not involve code changes.	In Solution
Supported Customization	Customizing a solution for a range of scenarios by adding code via the Solutions Hub. Supported customizations do not modify the solution's source code but are performed in accordance with the customization steps and are upgrade friendly.	Solutions Hub
Customization	Changing a solution for a range of scenarios by modifying or extending the solution's code. Customizations are first implemented in a development environment and typically not supported by available configurations.	Appian Designer

Wherever possible, you should always explore configuration changes first, followed by Supported Customization via the Solutions Hub. If needed, and as a last resort, customize your solution via Appian Designer.

What is the Solutions Hub?

The Solutions Hub is an Appian site that enables Low-Code Developers to perform Supported Customizations on a compatible solution built on the Appian platform. These types of customizations enable the solution to meet the needs of their organization while preserving a clean upgrade path.

The Solutions Hub focuses solely on Supported Customizations and is intended for use in a development environment only, where these types of customizations should be performed and tested before being promoted to a higher environment. Configuration changes are performed within the solution itself.

Just as Amazon allows small business owners to set up and customize their own online storefront, the Solutions Hub allows you to truly make an Appian solution your own so that it meets the needs of your specific use case.

Supported Customizations made using the Solutions Hub are preserved when you upgrade to a new solution version. This means that when you upgrade your Appian Solution to get the new features, your previous customizations remain intact. This allows your organization to take on a newly released solution version as soon as it is available.

When should I use the Solutions Hub?

It is important to understand when you should utilize the Solutions Hub over customizing directly in Appian Designer.

Appian recommends using the Solutions Hub when:

- You want to modify your solution's branding.
- You want to modify text in the languages that ship with your solution.
- You want to add new text to support a customization.
- You want to modify images that ship with the solution.
- You want to add new user interface components, pages, or elements to the solution, and there's an applicable user interface customization template that fits your use case.
- You want to extend a process that ships with the solution, and there's an applicable workflow customization template that fits your use case.
- You want to adjust business logic that ships with the solution, and there's an applicable business logic customization template that fits your use case.
- **You want to preserve customizations and not have to reapply them each time you upgrade your solution!**

Each solution supports a varying degree of these use cases. You can find all of the available supported customizations for your solution by opening up the Solutions Hub on a development instance of your solution. If you need to install the latest version of the Solutions Hub, you can follow the steps in the [installation guide](#).

Solutions Hub Installation Guide

Introduction

The Solutions Hub comes pre-installed on your development environment with any new solution offering or upgrade of an existing solution via Appian Cloud.

This page provides instructions for installing the Solutions Hub. Manual install is necessary if you:

- Are an on-premise customer.
- Want to receive the latest version and features of the Solutions Hub, but you haven't recently upgraded, or do not plan on upgrading, your Appian solution.
- Want to install the Solutions Hub on another development or customization environment outside of your Cloud provisioned development environment.

Technical support

Please call the dedicated solution help line for your region if at any point you need assistance or have questions:

- US: +1 (703) 420-1311
- AUS: +61 2850 34152
- UK: +44 20 3929 3748

All Appian Solution customers can also email Appian Support at support@appian.com or log in to [Appian Community](#) and open a support case to request assistance. Information on Solutions Support Services can be found [here](#).

System requirements

- Appian 22.1 or later.
- A supported [web browser](#).

Step 1: Download software package

To download the software package (as an existing Customer or Partner):

1. Go to the **SUPPORT** tab on [My Appian](#).
2. Click **DOWNLOADS**.
3. Click **SOLUTIONS**.
4. Find and open "Solutions Hub v22.1.1.1.0"

5. In **Downloads**, click the **Solutions Hub** installer link.
6. Click **PROCEED** to agree to the license agreement.
7. Click **Solutions Hub v22.1.1.1.0** to download the ZIP file.
8. Unzip `SolutionsHubv1.1.0.zip` to access the software installation files.

Locate the following installation files, some of which will be used in later steps.

- `appian-solutions-1.26.1.jar`
- `01.SolutionsHubv1.1.0.sql`
- `SolutionsHubv1.1.0.zip`
- `SolutionsHubv1.1.0-AdminConsole.zip`

Step 2: Deploy Plug-ins

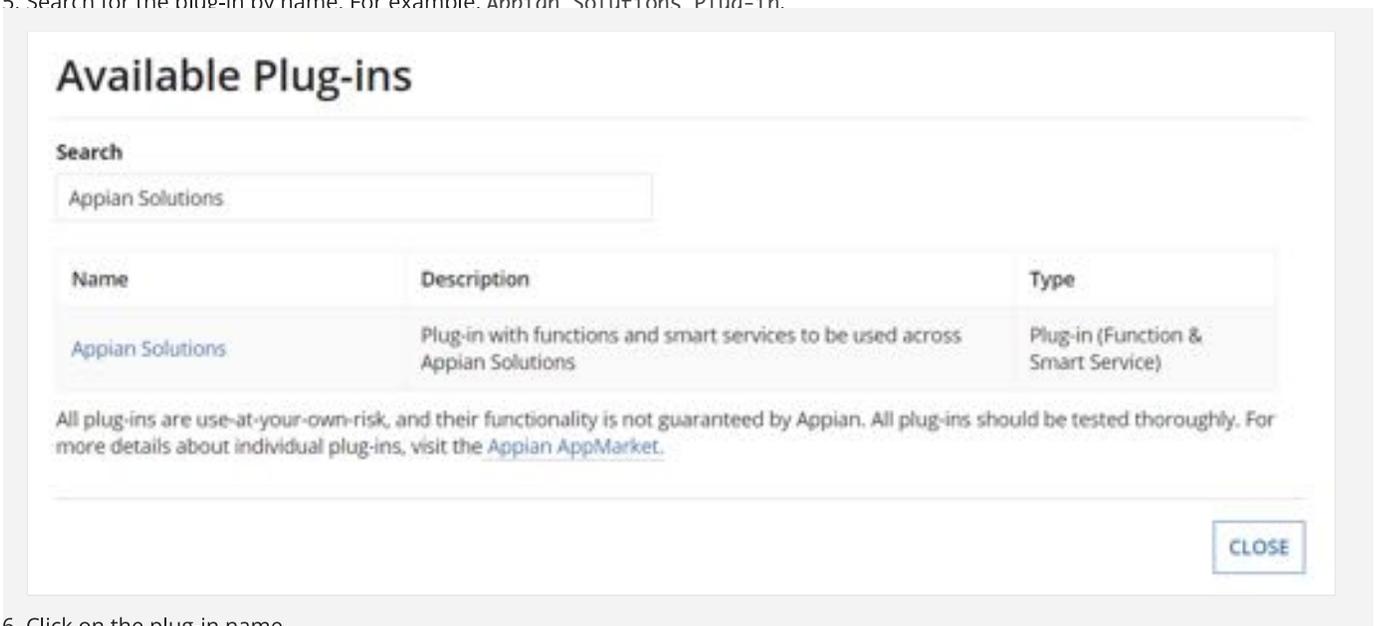
The Solutions Hub relies on the *latest* version of the Appian Solutions Plug-in to be deployed in the target environment before the application can be imported. This plug-in is also a prerequisite for most Appian solutions, so it may already be installed on the target environment.

- [Appian Solutions Plug-in \(v1.26.1+\)](#)

Appian Cloud Environments

To deploy the plug-in for an Appian Cloud environment:

1. In the target environment, log in as the deployment user.
2. Navigate to the **Admin Console**.
3. On the left side of the console, click **Plug-ins**.
4. Click **ADD PLUG-INS**.
5. Search for the plug-in by name. For example, `Appian Solutions Plug-in`.



Available Plug-ins

Search

Appian Solutions

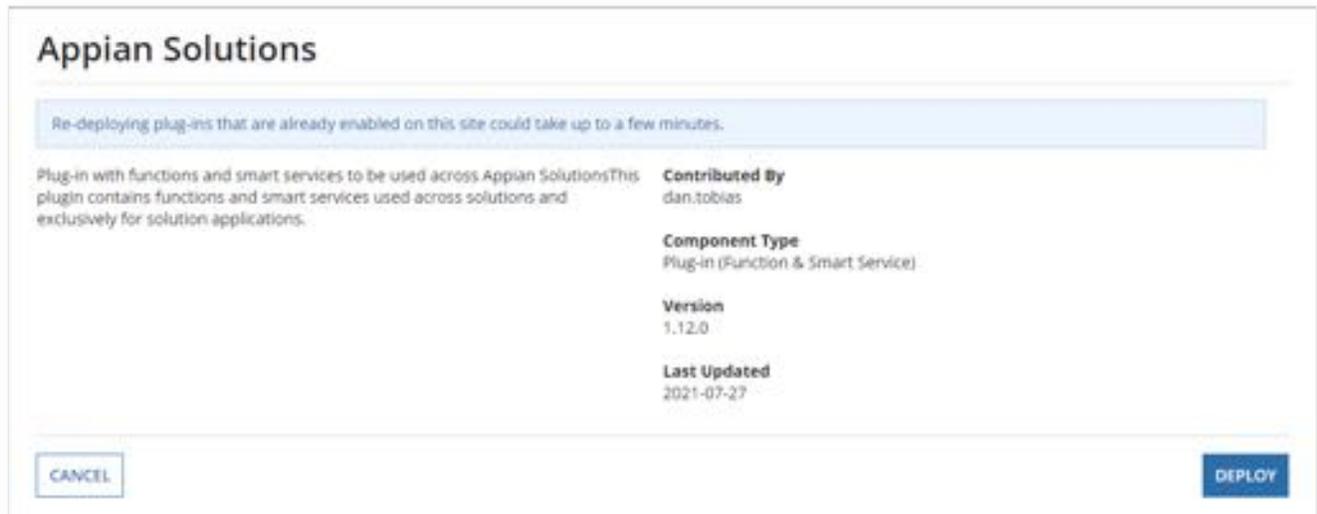
Name	Description	Type
Appian Solutions	Plug-in with functions and smart services to be used across Appian Solutions	Plug-in (Function & Smart Service)

All plug-ins are use-at-your-own-risk, and their functionality is not guaranteed by Appian. All plug-ins should be tested thoroughly. For more details about individual plug-ins, visit the [Appian AppMarket](#).

CLOSE

6. Click on the plug-in name.

7. Click **DEPLOY**.



Self-Managed Environments

To deploy the plug-in for a self-managed environment:

1. Retrieve the latest version of the Appian Solutions Plug-in from the [AppMarket](#). Alternatively, you can also use the `appian-solutions-1.26.1.jar` file downloaded in [Step 1](#).
2. Follow the [Deploying Plug-ins](#) instructions to deploy the plug-in file.

Step 3: Import the application

Import the application into your target environment.

1. In the target environment, log in as the deployment user.
2. Navigate to the **Appian Designer**.
3. Click **IMPORT**.
4. Click **UPLOAD** and choose the `SolutionsHub1.1.0.zip` file that was downloaded in [Step 1](#).
5. Click **IMPORT PACKAGE**.

Next steps

After you finish installing the application, see the [User Guide](#) to learn how to use it.

Solutions Hub User Guide

The Solutions Hub is a standalone site that offers a number of features that allow you to customize your solutions from a centralized dashboard. You can easily access the site from your solution's development environment. If the Solutions Hub is not installed on your development environment, you can follow the [installation guide](#) to install the suite.

The Solutions Hub User Guide is your quick reference guide to understanding of all of the features the Solutions Hub has to offer and how to use them to customize different components of your solutions.

Landing page

When you open the Solutions Hub, you'll see all of the solutions installed on the environment that support customization through the Solutions Hub.

Welcome, Bryan.
Go-Live with your Solutions.



Financial Services Suite

Use the links below to manage content for solutions in the suite

[MANAGE SUITE CONTENT](#)



Connected Onboarding

Manage content for Release v4.1.0



Connected Servicing

Manage content for Release v2.1.0



Know Your Customer

Manage content for Release v1.0.0

To access all of the available customizations for a given solution, click on the solution. If the solution is part of a solution "suite", then an additional **MANAGE SUITE CONTENT** button appears. For example, the Financial Services solution suite contains the Connected Onboarding, Connected Servicing, and Know Your Customer solutions. Any customizations common to all Financial Services solutions can be accessed by clicking the **MANAGE SUITE CONTENT** button.

Once in the context of a particular solution, you will be greeted with an overview of configuration & customization opportunities available for your solution. From here, you'll have the tools you need to configure & customize your Appian solution! There are links to the solution's configuration site(s), navigation tabs to each type of supported customization, and lastly a direct link to Appian Designer.

Financial Services Suite

- Overview**
- Brand
- Images
- Text
- Functionality

How do I tailor Financial Services Suite for my needs?

Whenever possible, you should always explore configuration changes first, followed by Supported Customization via this site. As a last resort, customize your solution via Appian Designer.

<p>1</p> <p>Configuration</p> <p>Adapting a solution for a range of scenarios by modifying the solution's out-of-the-box, front-end settings. Configurations do not involve code changes.</p> <p>Connected FS Settings</p> <p>System Administration Center</p>	<p>2</p> <p>Supported Customization</p> <p>Customizing a solution for a range of scenarios by adding code via this site. Supported customizations do not modify the solution's source code, are performed in accordance with the customization steps, and are upgrade friendly.</p> <p>THIS MODULE</p>	<p>3</p> <p>Appian Designer</p> <p>Changing a solution for a range of scenarios by modifying or extending the solution's code. Customizations are first implemented in a development environment and typically not supported by available configurations or supported customizations.</p> <p>Appian Designer</p>
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You can easily navigate context between solutions within the solution suite by selecting the desired solution from the dropdown.



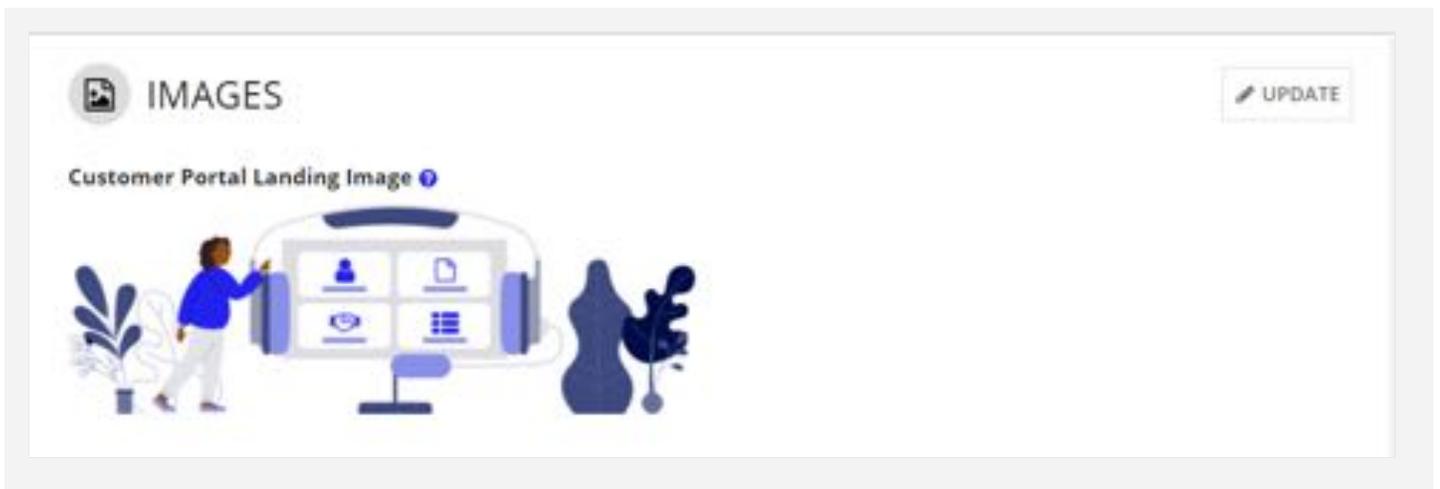
Types of customizations available

Workforce Safety 12 supports the following customization categories. Each solution offers a varying degree of supported customization templates within each category.

Images

You may want to modify the images that ship with your solution to fit your corporate brand. Image customization involves uploading new images via the Solutions Hub. Image customizations replace the default images that shipped with your solution. These changes persist even on solution upgrades.

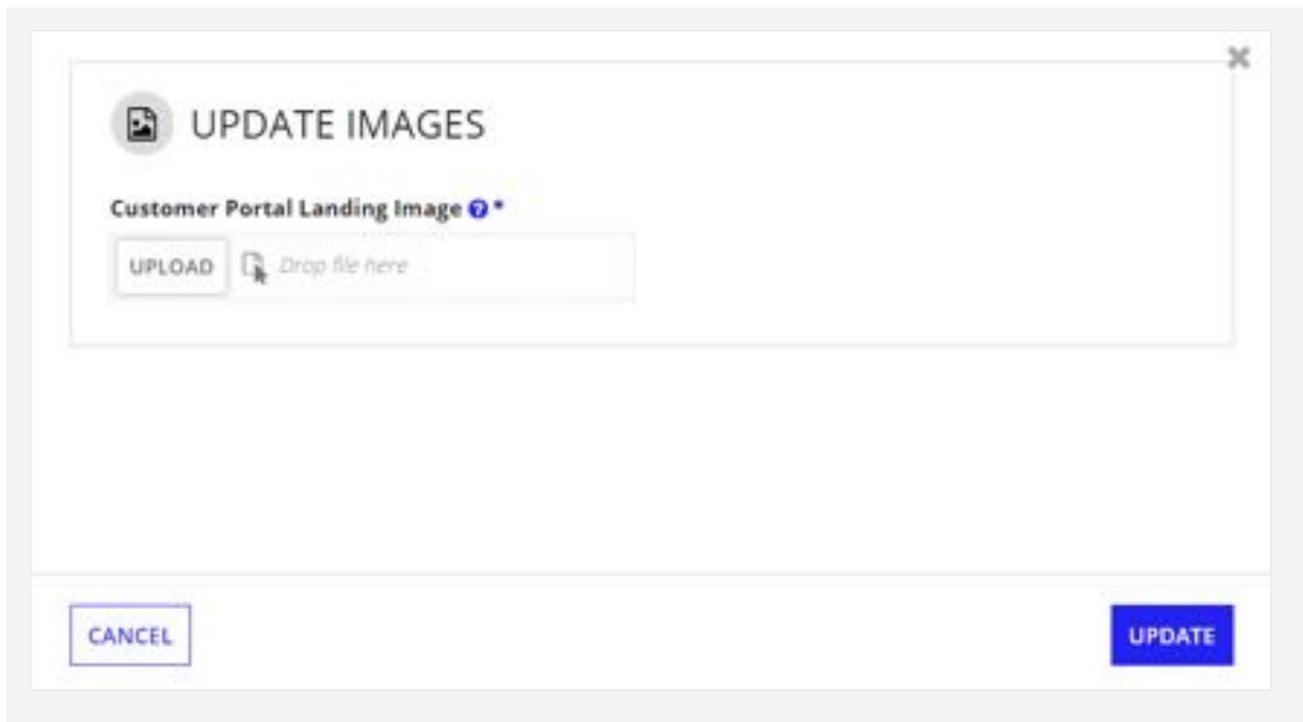
To perform an image customization, navigate to **CONFIGURE & CUSTOMIZE** → **IMAGES**. The Images section displays all of the default images that shipped with the solution and are available for customization.



When you click **UPDATE**, the UPDATE IMAGES dialog appears with the current file for each image. Hover over the image you want to replace, and click **X** to remove the current file.



Then, simply upload a new image. Newly uploaded images must be the same file type as the original image.



Once you are finished making changes, click **UPDATE**. Any modifications to images you made will persist, even if upgrading to a new version of the solution.

User Interface

User Interface is a functional customization that includes any customization templates that have been exposed by the solution's product engineers to allow you to:

- Slot in an open concept interface
- Replicate a component
- Modify an existing interface

See [Functional Customizations](#) for guidance on how to perform, edit, or revert a user interface customization.

Workflow

Workflow is a functional customization that includes any customization templates that have been exposed by the solution's product engineers to allow you to extend an existing process.

Process extension is useful in situations where you may want to take action upon completion of out of the box processing. Examples include:

- Writing to an external database
- Storing generated documents in a document repository
- Calling an integration

See [Functional Customizations](#) for guidance on how to perform, edit, or revert a workflow customization.

Functional customizations

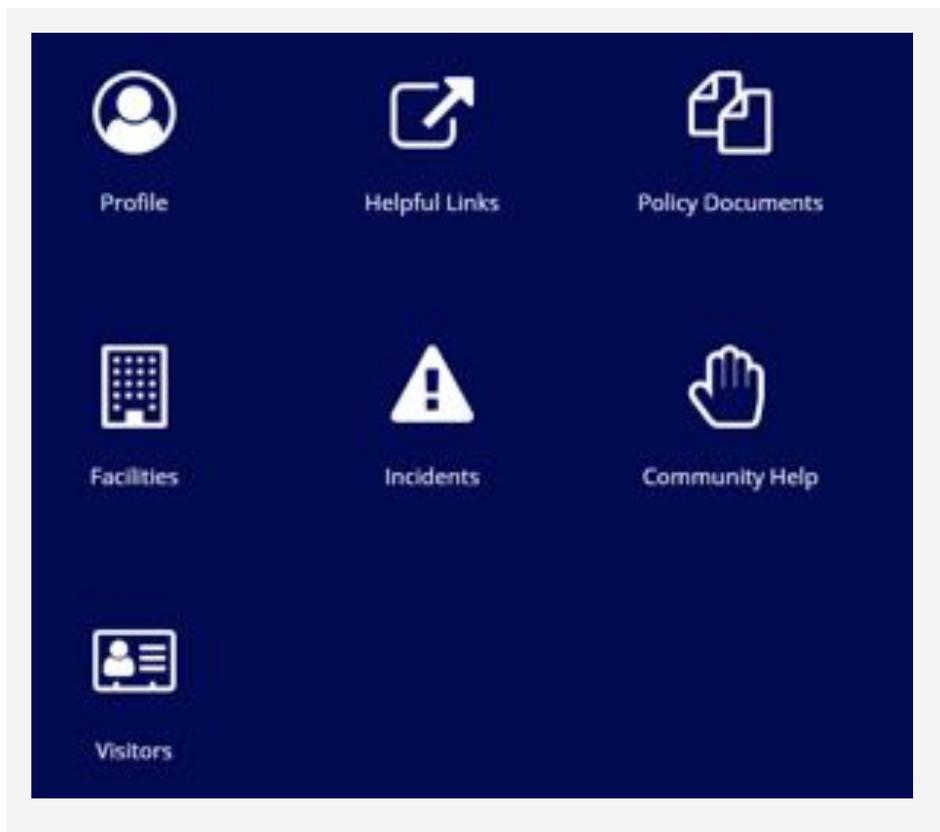
This section outlines the methodology for performing, editing, and reverting functional customizations.

Performing a customization

To perform a customization, find the supported customization template that best matches your customization use case. Navigate to **CONFIGURE & CUSTOMIZE -> FUNCTIONALITY** within the context of the solution you want to customize.

The title and description of the supported customization template provide contextual clues as to where in the solution the customization occurs.

For example, let's say you want to customize your solution's landing page so that it includes a link to custom content. On the existing landing page, shown below, you want to add a new "Training" link.



After searching the available customization templates, and finding the template you want to customize, click **CUSTOMIZE**.

Home Page Quick Links
Renders quick link cards at the bottom of the Home Page, one quick link card for each configuration. Custom quick link cards are rendered after the quick link cards that are standard with the application.

 Default version



A confirmation dialog appears, indicating that a new object will be created on the backend. Click **YES**.

Are you sure?

A new rule will be created with the suffix "_custom". This rule will execute in lieu of the "_default" rule.

When the customization template state refreshes, as shown below, click **EDIT** to begin customizing.

Home Page Quick Links
Renders quick link cards at the bottom of the Home Page, one quick link card for each configuration. Custom quick link cards are rendered after the quick link cards that are standard with the application.

 Custom version

A new tab opens in Appian Designer that allows you to begin customizing the code. You'll see detailed how-to instructions on performing the customization within the commented code.


```

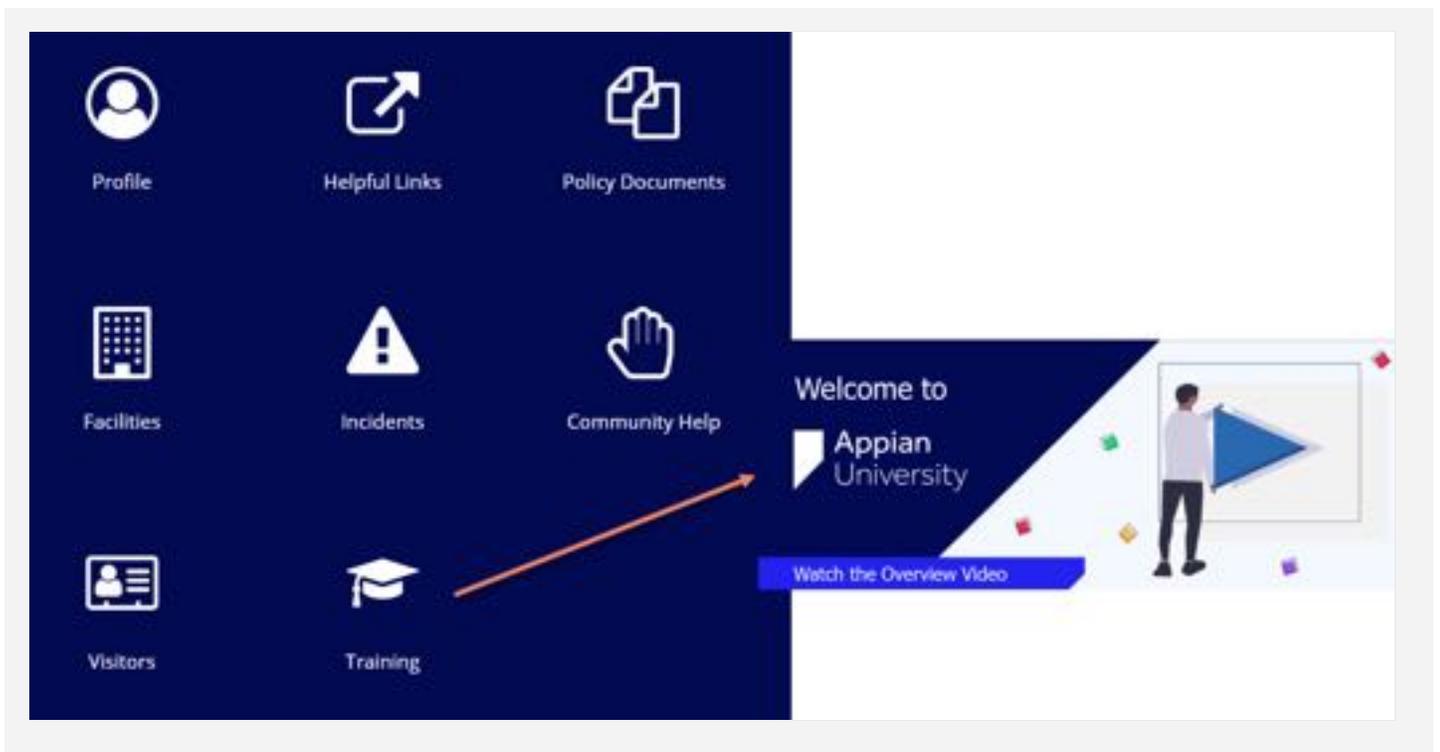
cast{
  "type!{http://www.appian.com/ae/types/2009}Map?list",
  {
    a!map{
      label: "Training",
      icon: "graduation-cap",
      showWhen: true,
      link: a!safelink(uri: "https://www.appian.com/university")
    }

    /*Quick Link Template - sample configuration:*/

    /*a!map(*/
      /*label: "My Link Label",*/
      /*icon: "icon",*/
      /*showWhen: true,*/
      /*link: a!safelink(uri: "https://www.google.com")*/
    /*),*/
  }
}

```

Finally, navigate to the area in your solution where you expect the customization to appear and verify the results. In our example, we can see that the new "Training" link was successfully added to the landing page. When the user clicks the link, they are redirected to the URL we specified in the customization.



Congratulations, you have successfully customized your solution. Your changes will persist when you upgrade to a new solution version!

Editing a customization

Maybe your business requirements have changed and you need to tweak the functionality of your supported customization. To edit a customization, simply navigate to the customization template, and click **EDIT**.

Home Page Quick Links

Renders quick link cards at the bottom of the Home Page, one quick link card for each configuration. Custom quick link cards are rendered after the quick link cards that are standard with the application.

 Custom version

 EDIT

 REVERT TO DEFAULT

The template will open in a new tab in Appian Designer where you can view the latest saved version of your customization.

Make the required changes and save the modified objects. Verify the intended results are displayed in the frontend of your solution.

Don't forget to [deploy](#) your customizations when finished!

Reverting a customization

If you find that the latest version of an out-of-the-box feature in the latest solution release addresses your customization use case, you may want to adopt the new feature and revert your customization back to the default behavior.

Navigate to the appropriate customization template and click **REVERT TO DEFAULT**.

Home Page Quick Links

Renders quick link cards at the bottom of the Home Page, one quick link card for each configuration. Custom quick link cards are rendered after the quick link cards that are standard with the application.

 Custom version

 EDIT

 REVERT TO DEFAULT

After understanding the impacts of this type of customization change, click **YES** on the confirmation dialog. The default out-of-the-box solution behavior will overwrite your customization so that it is no longer present in the solution.

Are you sure?

The "_default" rule will now execute in lieu of the "_custom" rule. The previous "_custom" rule will be appended with a suffix of "_reverted" and available in the application package for easy deployment.

Deploying customizations

To deploy your customizations to a higher environment, click the **DEPLOYMENT** tab under the solution you want to deploy.

Answer the series of questions to dynamically generate the required deployment steps on-screen. Follow the steps shown to deploy your solution to a higher environment.

Below is an example of answering these questions and the rendered deployment steps:



Home Page User Guide

Introduction

In order to keep employees safe and healthy, you need to collect information from them, like:

- Are they at increased risk if they come back to the workplace?
- Are they experiencing symptoms of COVID-19 or do they have a higher risk of becoming infected?
- Have they noticed any unsafe conditions?
- How are they feeling and do they need any assistance?
- Are they fully vaccinated and do they have related documentation?

But there's a problem—communicating with a large number of people is incredibly difficult. Workforce Safety makes it easier for individuals to communicate with their organization.

This guide instructs users on how to use the Workforce Safety HOME page to stay informed and communicate with their organization.

See also

- For instructions on how to access Workforce Safety on a mobile device, see [Mobile Device Setup](#).
- For instructions on how to use the Workforce Safety Response Hub, see the [Response Hub User Guide](#).

Workforce Safety home page

Workforce Safety contains a Home page where users can:

- [Update user profile](#)
- [View target announcements](#)
- [Submit COVID-19 test results](#)
- [Update COVID-19 health information and vaccination history](#) (if enabled)
- [Report incidents](#) (if enabled)
- [Complete isolation updates](#)
- [Complete surveys](#) (if enabled)
- [Request passes](#)
- [Log contacts](#)
- [Use community help features](#) (if enabled)
- [View valuable resources](#) such as safety guidelines, helpful links, policy documents, and facilities
- [Host visitors](#), if they can see the Visitors icon

Only the information that a user can act on will display on their Home page. For example, if a response manager has not requested test results from a user, the **Please take a COVID-19 test section** will not display.

Good evening, Karen

Europe HQ Today

London, England
United Kingdom 08/12
Wednesday

Wednesday



Log your contacts



- Anyone that was within 6 feet of you for at least 15 minutes
- Any area that you visited or used while at a facility

LOG CONTACTS

Requesting a pass for another facility? Planning ahead for tomorrow?

REQUEST PASS

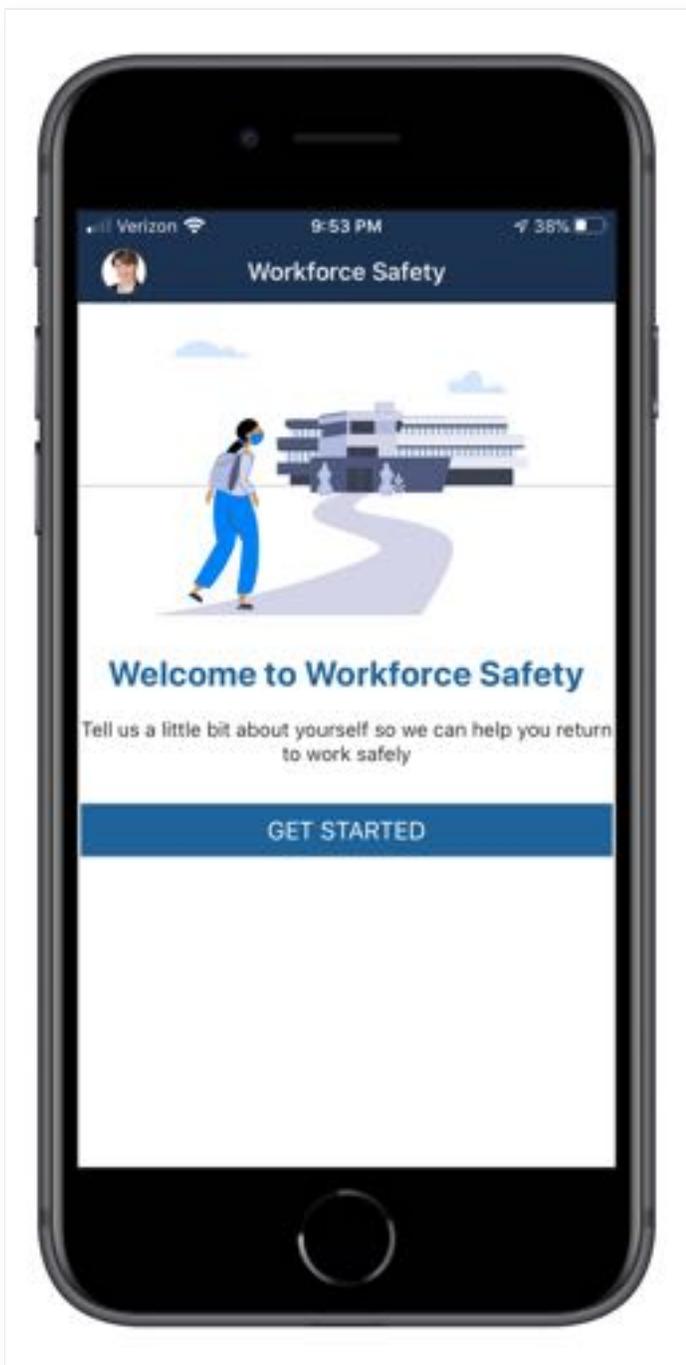
Help keep our community safe

Let us know if you have tested positive for COVID-19, are in need of assistance, or see any unsafe behavior or missing safeguards

REPORT AN INCIDENT

Updating user profile

The first time users log in to the Workforce Safety solution, they see a Welcome screen. Clicking the **GET STARTED** button will allow users to provide their profile information.



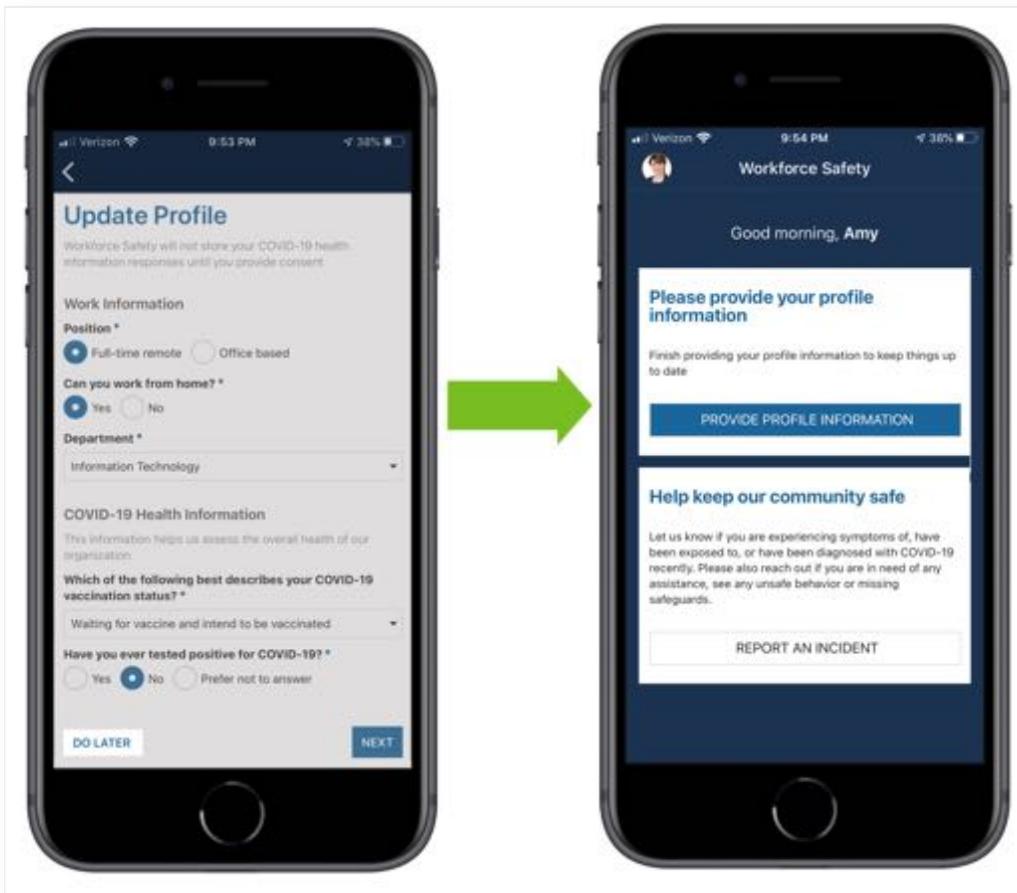
Users can click **DO LATER** to skip this step and go straight to the Workforce Safety Home page.

If they skip this step, they can still:

- Report incidents (if enabled)
- View resources
- View announcements

Until they provide their profile information, they cannot:

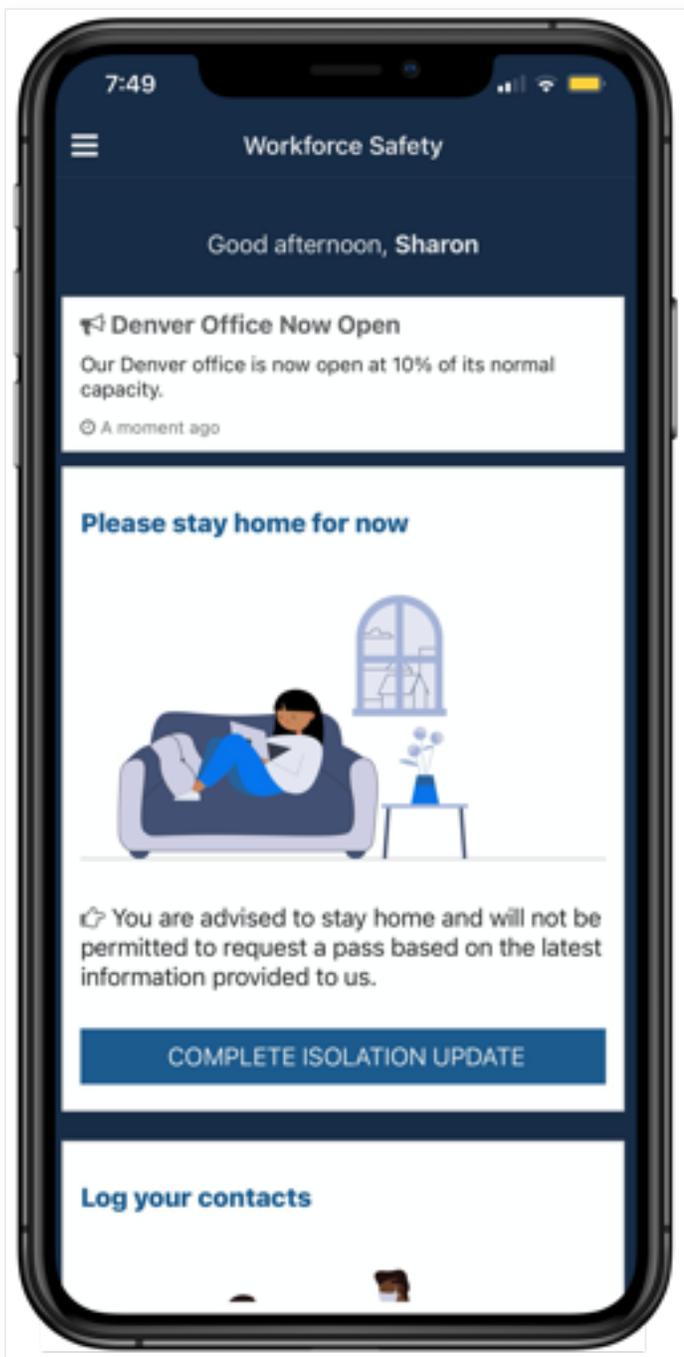
- Complete a survey
- Request a pass
- Log contacts
- Provide COVID-19 test results
- Provide proof of vaccination



Users can update their profile information at any time by clicking the **Profile** icon at the bottom of the home page.

Viewing target announcements

Users can also view target announcements from the Home page. For example, a response manager can send an announcement to let users know when a facility is closed or reopened.



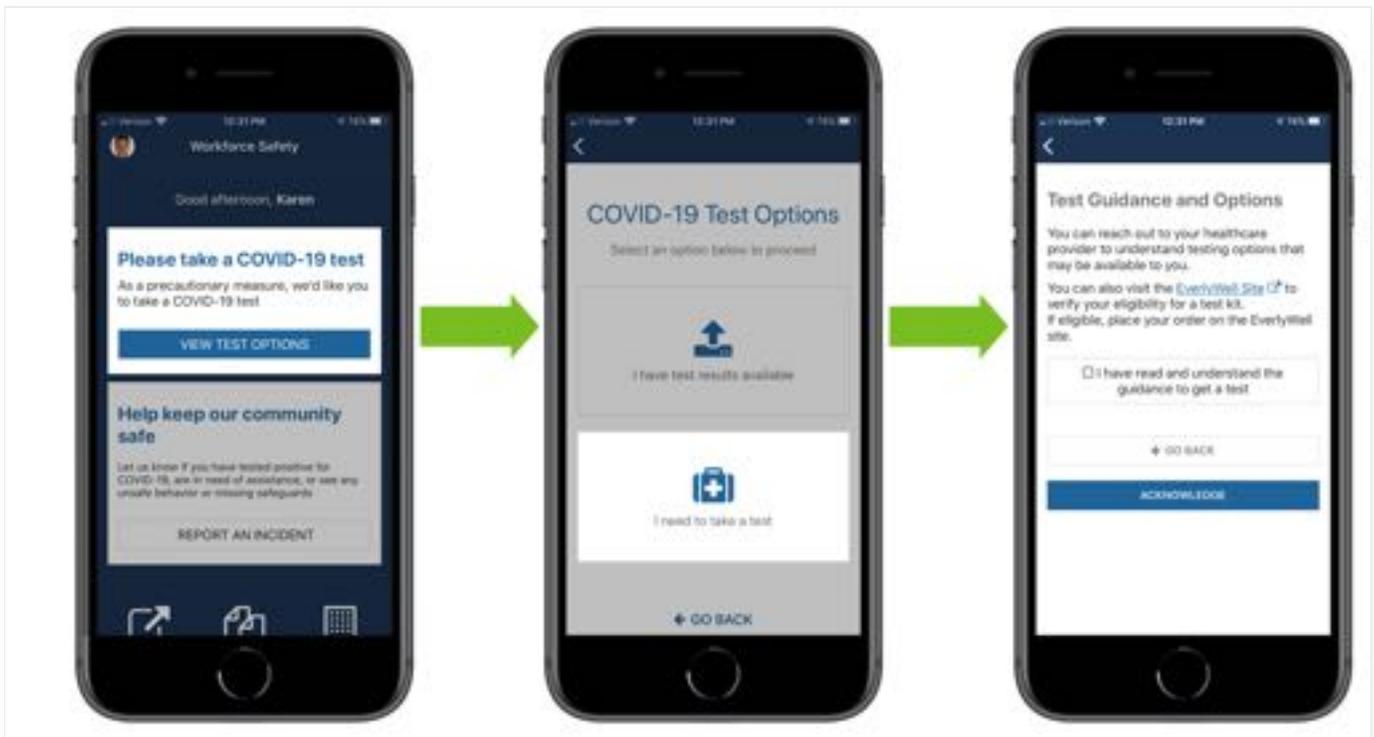
Workforce Safety allows response managers to create a new announcement to send to all users or users in specific departments and facilities only. Users in the selected groups are the only ones who will receive an email and push notification on their mobile device when the announcement is sent. They are also the only ones who can view the announcement on their landing page.

Acknowledging and submitting test results

If a response manager has requested a test from a user, the user will not be able to request a pass or update the survey until they have acknowledged the test request.

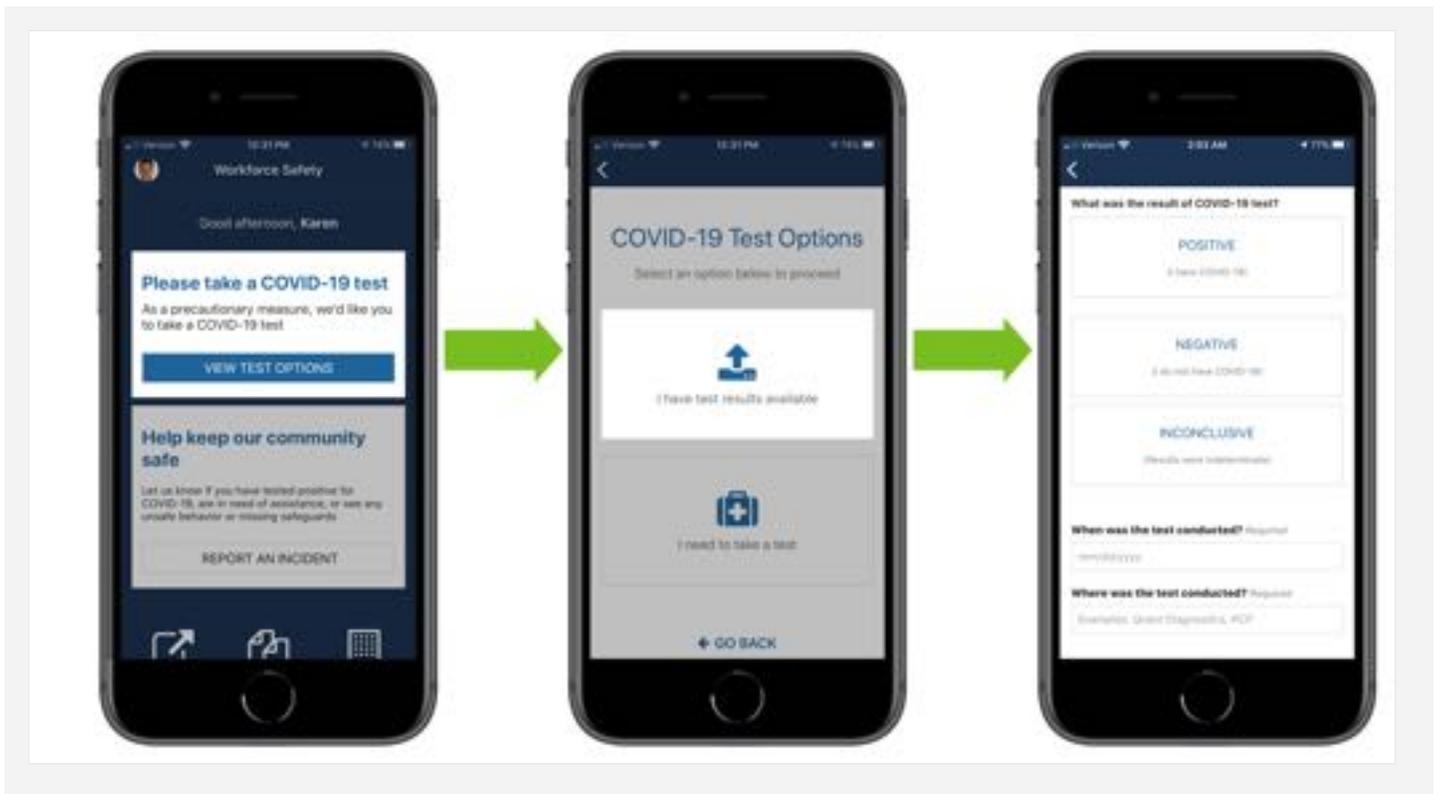
To acknowledge the test request:

1. On the home page, click **VIEW TEST OPTIONS**.
2. Click **I need to take a test**.
3. Select **I have read and understand the guidance to get a test** and click **ACKNOWLEDGE**.



To submit test results:

1. On the home page, click **VIEW TEST OPTIONS** or **SUBMIT TEST RESULTS**.
2. If you didn't already acknowledge your test request, click **I have test results available**.
3. Enter the information for your test and click **SUBMIT**.



Updating health information and vaccination history

If Workforce Safety is configured to collect **Vaccination Insights**, users can update their profile with COVID-19 health information via their Profile form. This includes data about their vaccination status and COVID-19 positivity history. From their Profile form, users can update their:

- COVID-19 vaccination status (if enabled)
 - COVID-19 positivity test history

- Date of last positive test
- Vaccine name and manufacturer (if enabled, and user is partially or fully vaccinated)
- Date of most recent dose (if enabled, and user is partially or fully vaccinated)
- Proof of vaccination (if enabled, and user is partially or fully vaccinated)

Note that if the **Ask for user consent** setting in the **Vaccination Insights** configuration section is toggled on, users are required to provide consent before they submit any vaccination information, including photos or files showing proof of vaccination.

Updating COVID-19 health data

When completing or updating this section, if a user indicates that they are waiting to receive the COVID-19 vaccine or that they are partially vaccinated, Workforce Safety reminds them to update their vaccination status after 28 days. If the vaccination status question is configured to require further explanation when a user indicates they do not intend to be vaccinated, they will need to provide a reason why.

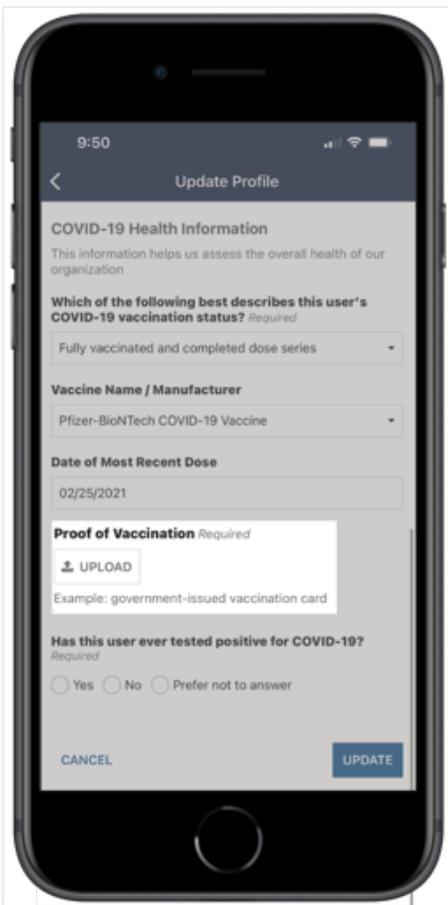
In addition, Workforce Safety makes it easy for users that have a positive COVID-19 test result already saved in the system. The solution auto-populates the user's previously recorded information in the **COVID-19 Health Information** section of their profile form.

When completing or updating their COVID-19 health data, any user that reports a COVID-19 positive test result is also required to provide the date of their last positive test.

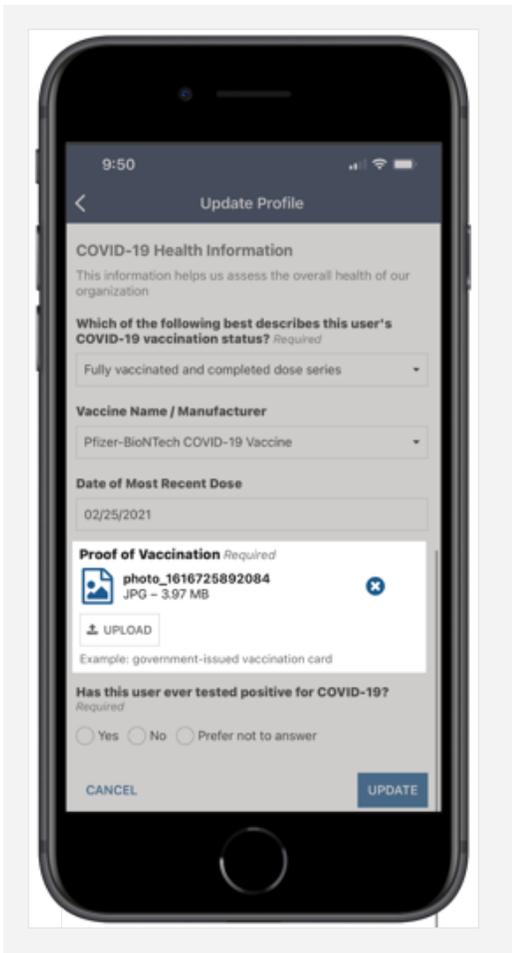
Providing proof of vaccination

When the **Require Proof of Vaccination Verification** setting is toggled on, users who report they are partially or fully vaccinated must provide proof of vaccination. They can do this by uploading related documentation to their Profile form. Note that no action is required by the user until they indicate they're fully or partially vaccinated.

In the **Proof of Vaccination** field, users that indicate they are fully or partially vaccinated can upload documentation that confirms they've received one or more doses of a specific vaccine.



When a user is ready to provide their proof of vaccination, they can simply tap **Upload** in their Profile form. This allows them to use their mobile device to capture one or more photos or videos of their vaccination proof, upload one or more files confirming vaccination, or upload a combination of visual media and files.



To upload proof of vaccination:

1. From the Workforce Safety Home page, click **UPDATE PROFILE** in the **Update your vaccination status** section.
2. Go to the **Proof of Vaccination** field and click **UPLOAD**.
3. Select a document upload option to attach your visual media or file.
 - o Options include:
 - Take a photo
 - Take a video
 - Choose from library
 - Choose file
4. Click **NEXT**.

Before they are verified, these users are classified as **Fully Vaccinated (Unverified)**. Users who report being fully vaccinated before this setting is toggled on are also classified as **Fully Vaccinated (Unverified)**. After a Response Manager verifies a user's vaccination documentation, the user's vaccination status will change to **Fully Vaccinated (Verified)**.

For all users that are designated as fully or partially vaccinated prior to upgrading to the latest version of Workforce Safety and have uploaded documents to the **Related documentation** field, nothing is required. The solution will automatically migrate their files to the **Proof of Vaccination** field.

Reporting an incident

If the [User Incident Creation](#) feature toggle is active, users can report an incident to response managers. Incidents can be used to report things such as unsafe conditions, COVID-19 positive diagnoses, or exposure to or symptoms of COVID-19.

To report an incident:

1. From the Workforce Safety home page, click **REPORT AN INCIDENT**.
2. Select whether it is a **COVID-19 RELATED INCIDENT** or a **NON-COVID-19 RELATED INCIDENT**.
 - o **Note:** If **COVID-19 ISOLATION INCIDENT** is selected, the user's contact tracing data will be automatically collected and displayed to response managers in the incident.
3. Fill out the incident details and click **REPORT INCIDENT**.

The image shows two overlapping screenshots of the 'Add New Incident' form. The top-left screenshot is for a 'NON-COVID-19 RELATED INCIDENT' and includes sections for 'Reporter Contact Details', 'Incident Details' (with fields for Type, Title, Incident Date, Facility, Department, and Description), and 'Attachments'. The bottom-right screenshot is for a 'COVID-19 RELATED INCIDENT' and includes sections for 'Incident Information' (with fields for Impacted Person, Facility, Department, and Assigned To), 'Testing Information' (with a 'Confirmed COVID-19 positive through a test?' checkbox, 'Test Date', 'Test Location', and 'Upload the test result' field), and a 'Response Manager Notes' section. Both forms have 'CANCEL' and 'BACK' buttons at the bottom left and a 'REPORT INCIDENT' button at the bottom right.

If a COVID-19 isolation incident was created, the user will be automatically placed into [isolation](#). Users can only have one open COVID-19 isolation incident at a time.

Viewing incidents

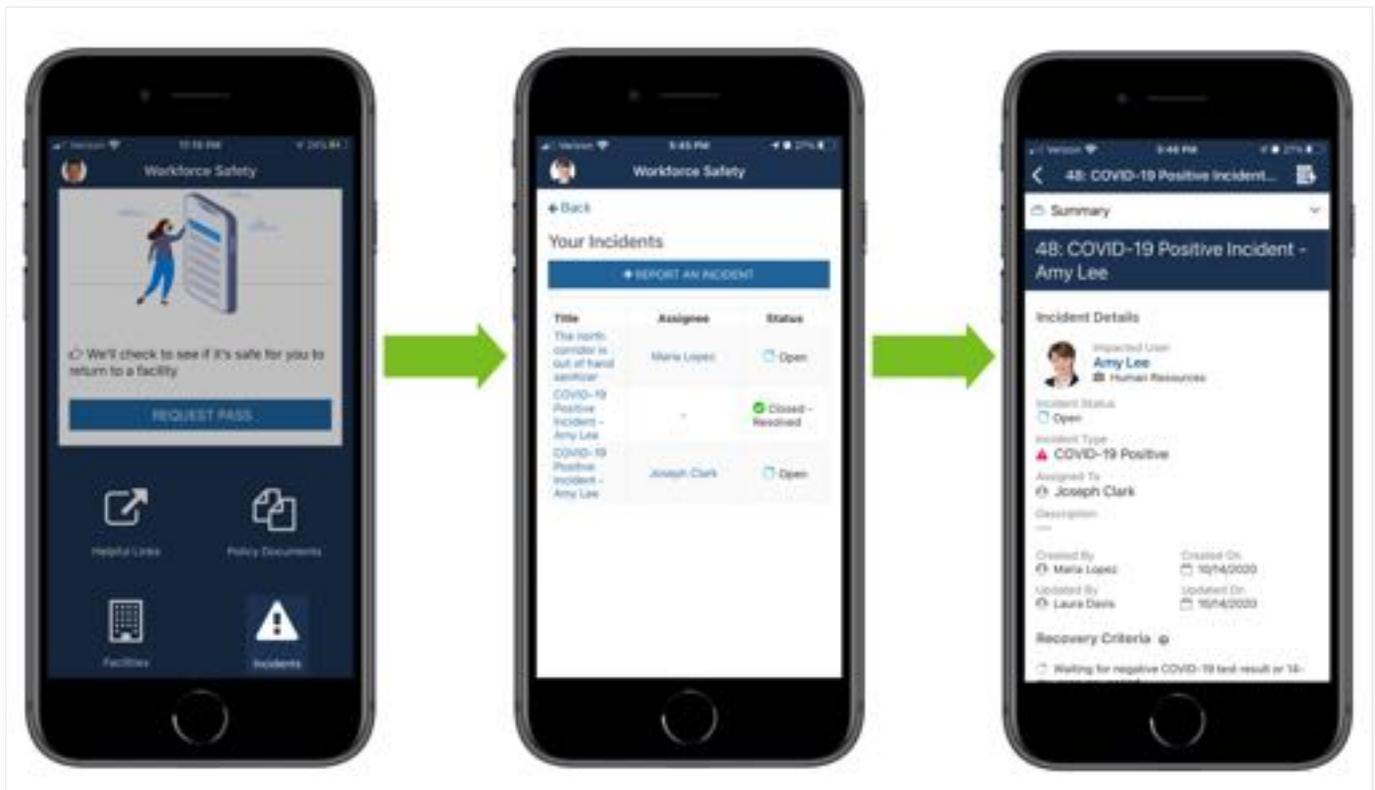
To view incidents, scroll to the bottom of the home page and click **Incidents**.

Only the following incidents display:

- COVID-19 isolation incidents for the user.

- Incidents created by the user.
- Incidents created by a response manager on behalf of the user.

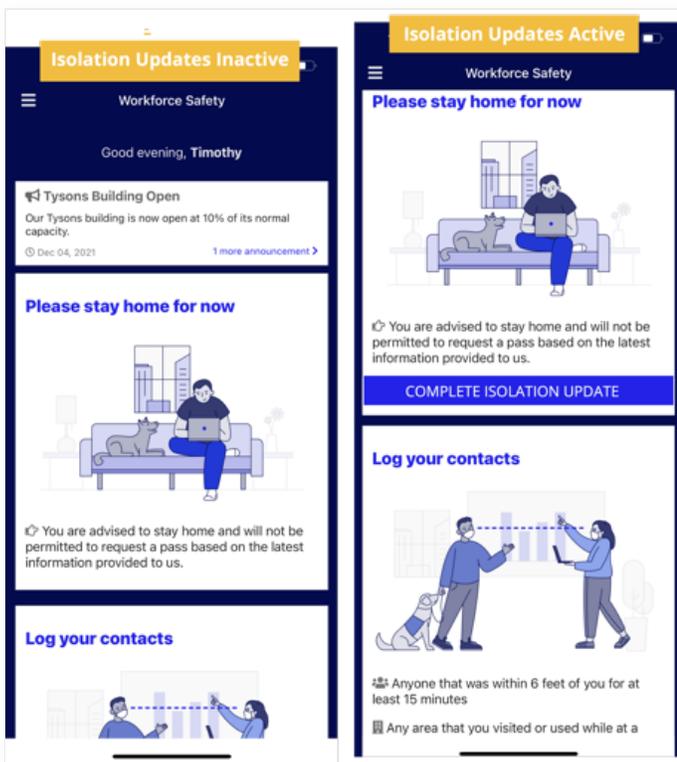
Non-COVID-19 isolation incidents that were automatically created based on a positive test or questionnaire response don't typically display to end users. However, if a response manager comments on an automatically-created incident, that incident will display to the user so that they can comment back.



Being in isolation

Users can be [placed into isolation manually](#) by response managers, or [automatically](#) if they report that they have been diagnosed as COVID-19 positive, are showing symptoms, or came in contact with someone who tested positive for COVID-19. While users are isolated, they cannot complete a survey or request a pass, but they can perform all other actions on the site. As soon as a user is placed into isolation any active passes they have will be revoked.

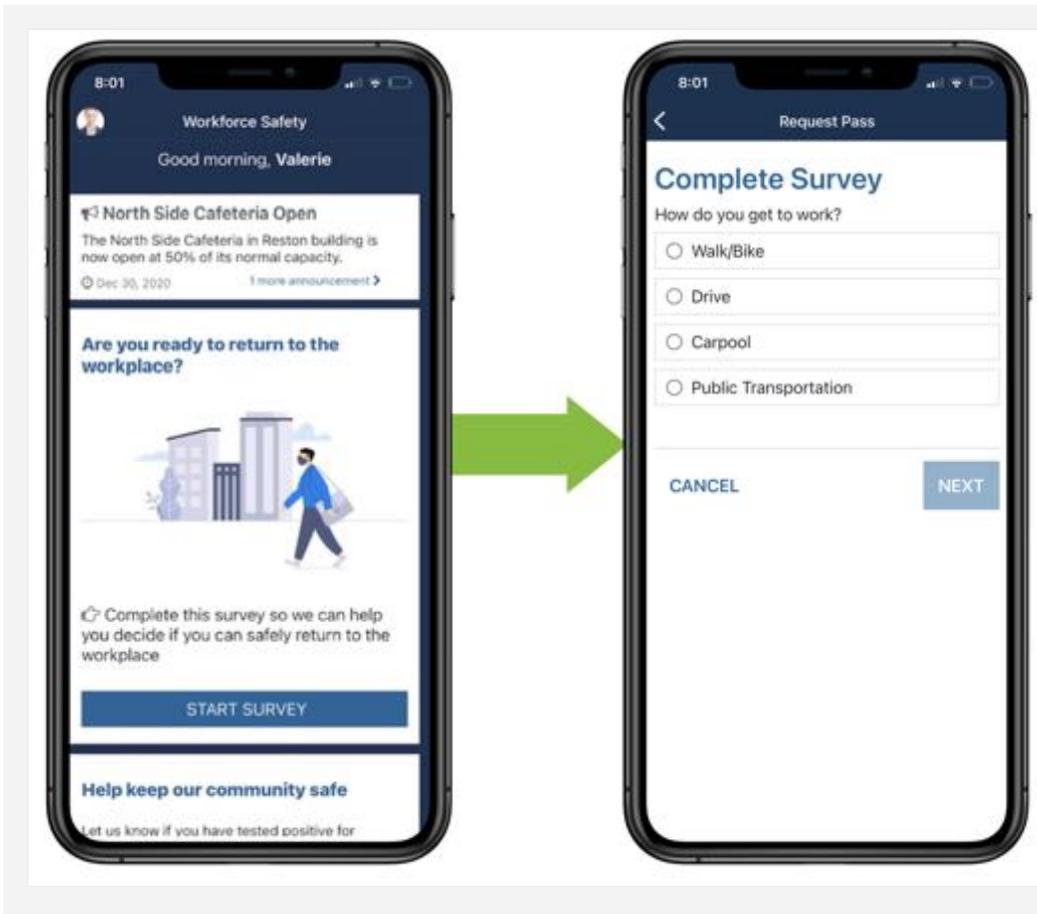
When users are in isolation, instead of a pass request section, they will see an isolation section on their home page. If [Isolation Updates](#) are active, and the visibility for at least one isolation questions is applicable to a user, that user will be asked to complete an isolation update.



Completing a survey

A survey is a set of questions that can be sent to users before they start requesting passes. You can use this to gauge interest and ability to return to the workplace.

When the [survey is active](#), on the Workforce Safety home page users will see an option to complete the survey. If they complete the survey with no disqualifying answers, they will be able to start requesting passes to determine their ability to return to the workplace.

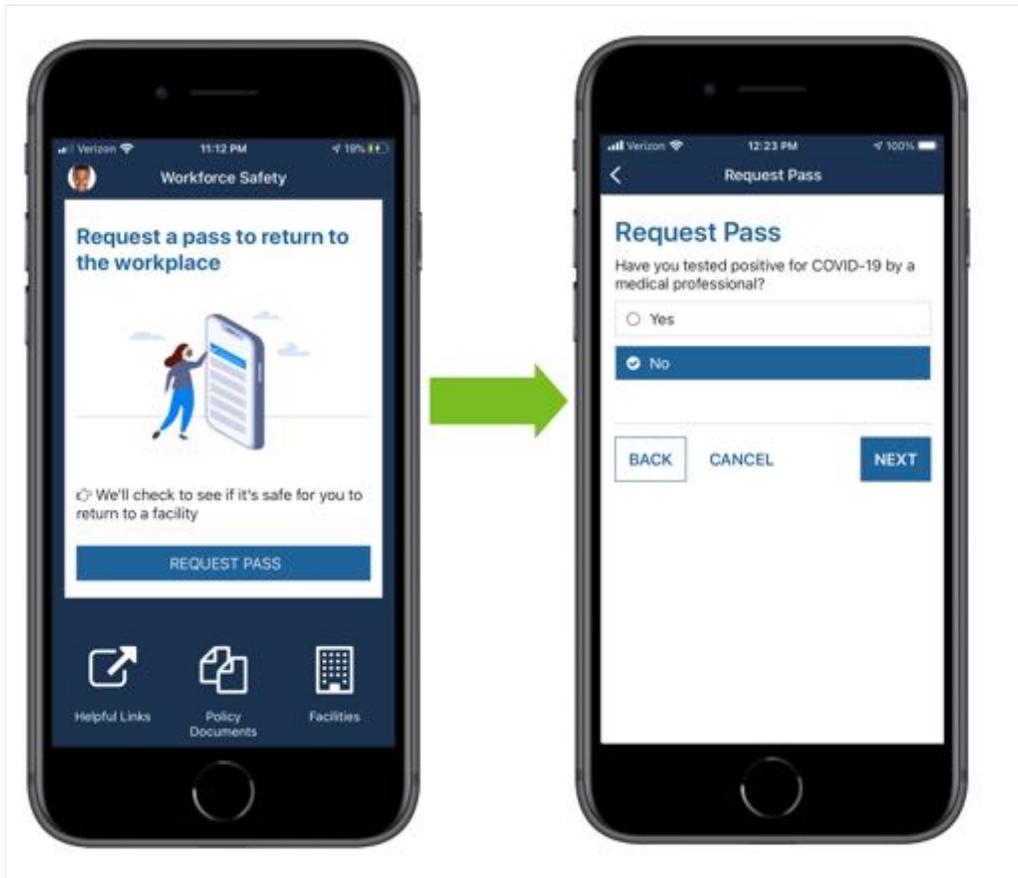


If the **Pass Requests Disabled by Active Survey Incidents** feature toggle is turned on and an incident is created based on a user's response to a survey question, they will not be able to request a pass until a response manager closes the incident. If they update their survey, a comment will be added to the incident, but it will not automatically allow them to request passes, even if they respond with answers that are not disqualifying.

Requesting a pass

If users are eligible to request a pass, they will see the request pass section on their Workforce Safety home page.

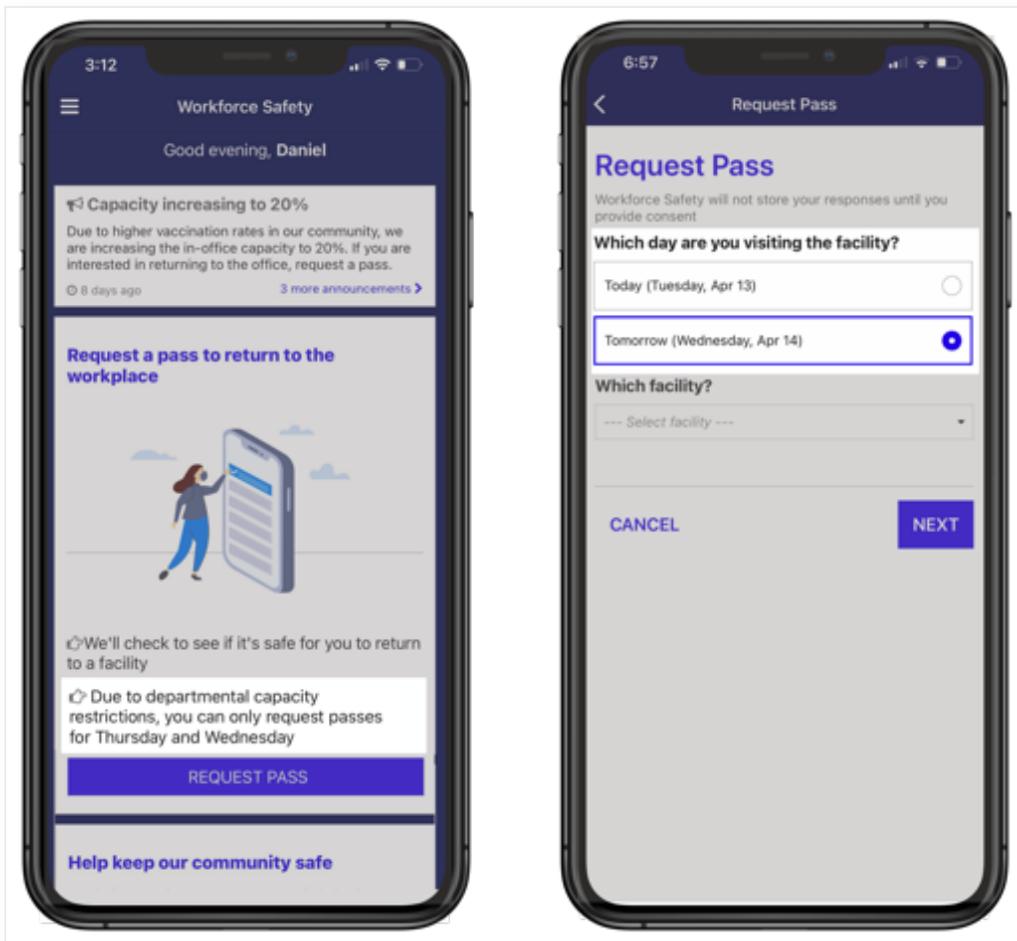
Requesting a pass helps users determine their fitness to return to the workplace. All questions are required and the information will go to the response managers reporting dashboard.



Users can request passes for multiple facilities. If the **Next Day Pass Requests** feature is toggled on, they can also plan ahead by requesting a pass for the next day.

If **Enforce Area Capacity Restrictions** is toggled on, users can select an area when requesting a pass. These areas are limited to a certain capacity. Areas that have reached their capacity limit cannot be selected. If the user doesn't select an area, they will be assigned to the area with the most available capacity.

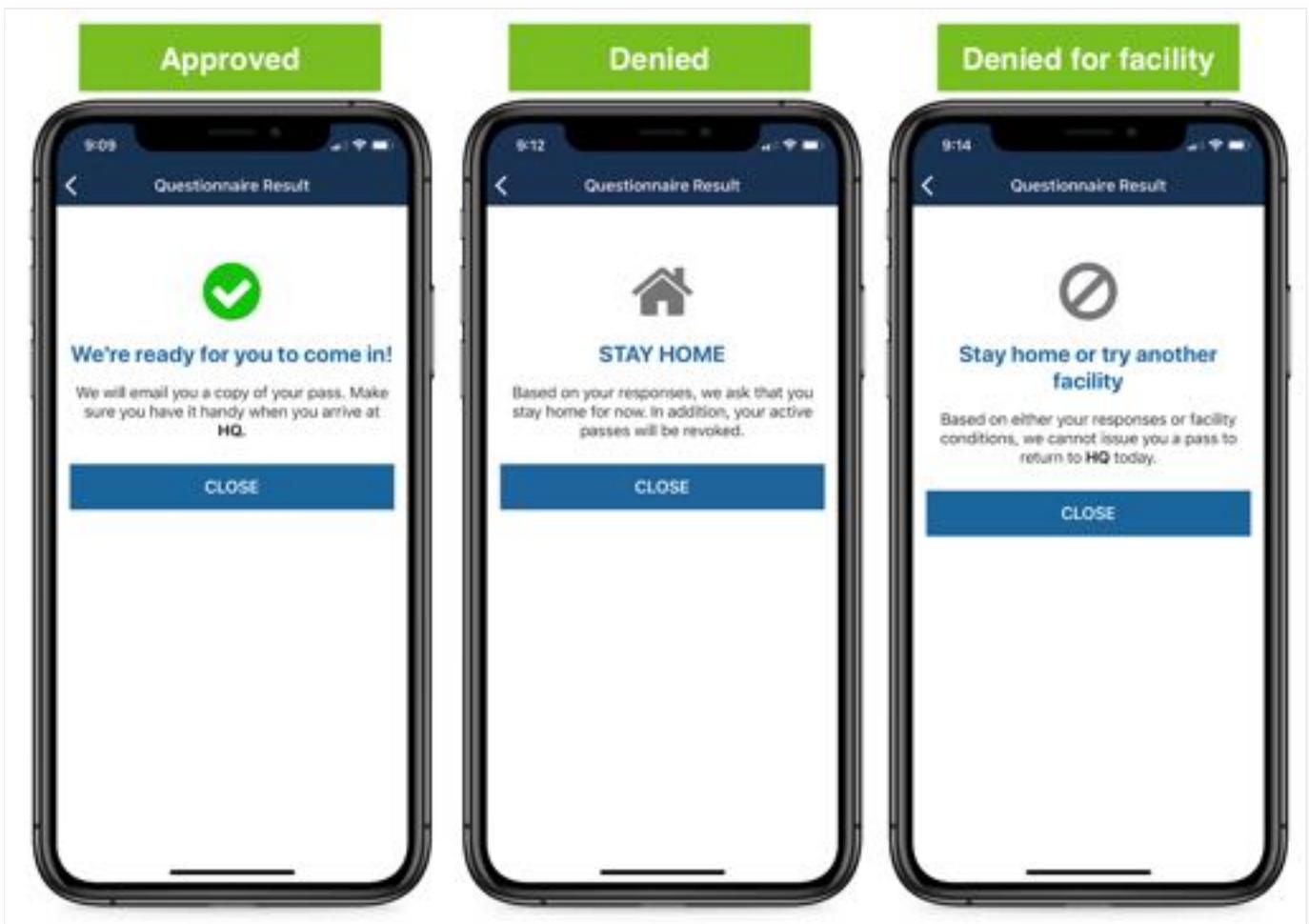
If **Cohort Management** is toggled on, users will see which days their department can request a pass for. They can also only request a pass for days that are assigned to their cohort.



The pass is valid for one day. After the pass expires, the user will need to request a pass again to receive another one.

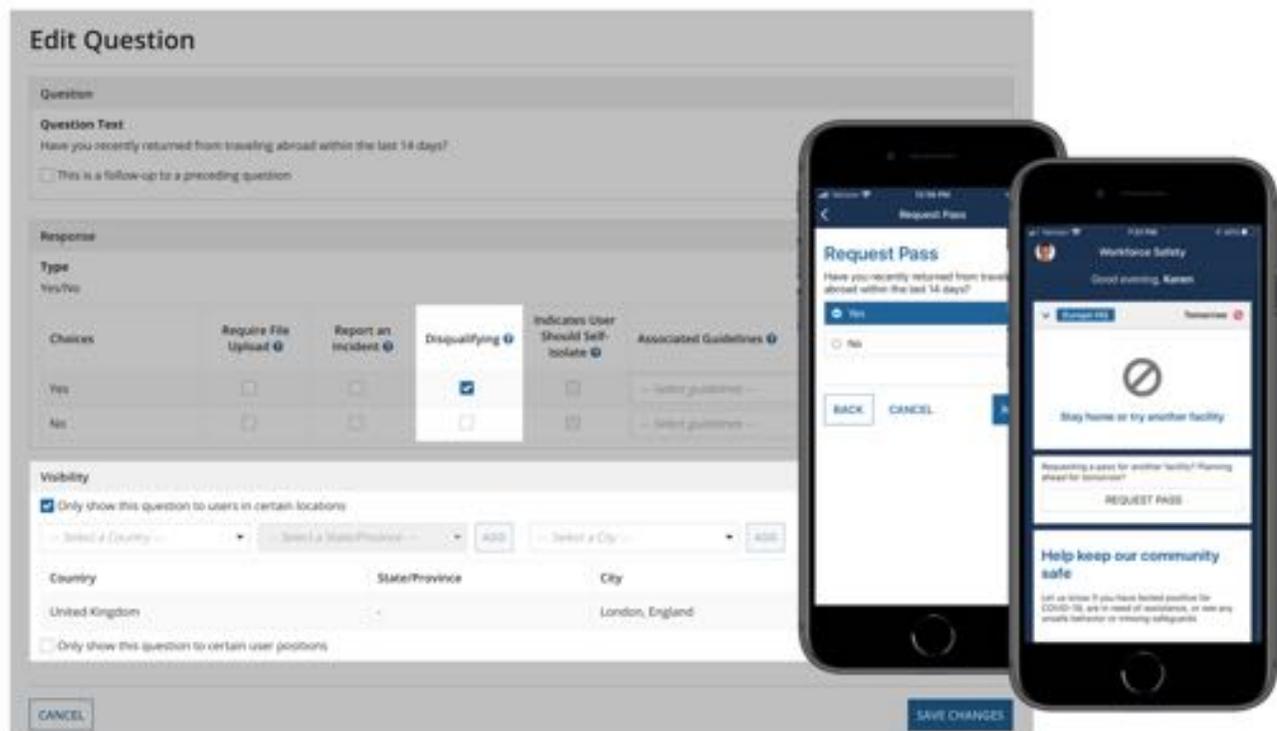
Pass eligibility

After a user submits their request, the result of their request displays. The possible results are: Approved, denied, or denied for facility.



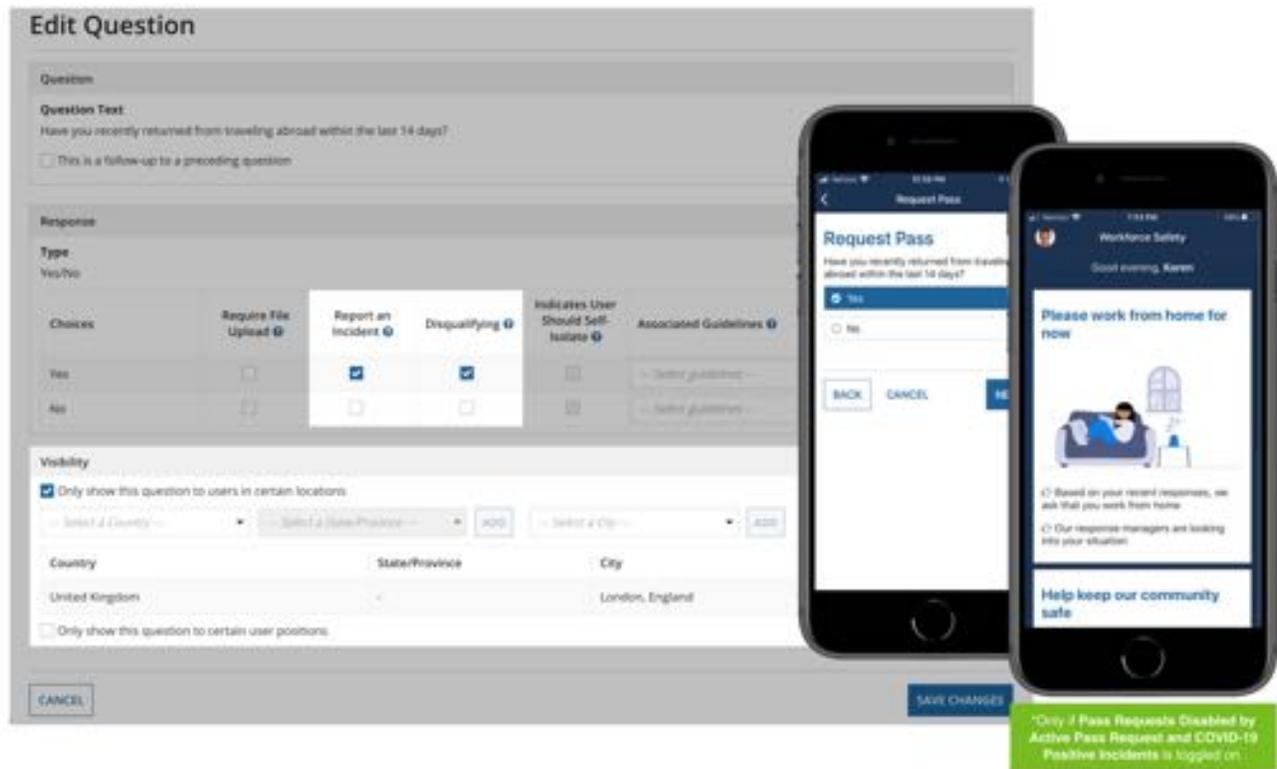
Denied for facility explanation

Some pass request questions are only for specific locations. When the questions are being configured, these questions have **Only show this question to users in certain locations** selected for visibility. If a user chooses a response that disqualifies them on a location-specific question, they will not be given a pass for that facility. Additionally, if they already have a valid pass for that facility, it will be revoked. They can still request a pass for other facilities.



Note that if the question is also configured to report an incident and the [Pass Requests Disabled by Active Pass Request Response Incidents](#) feature is active, they will not be able to request a pass for any facility, and their active passes will be revoked.

Pass Requests Disabled by Active Pass Request Response Incidents



For questions that aren't specific to a certain location, if a user responds with an answer that disqualifies them, any passes that they have been issued will be revoked and a message will display asking them to stay home.

Displaying passes

If a user is eligible for a pass for the day and facility that they are requesting, the pass displays on their home page.

The pass contains the following:

- The facility that the pass is for.
- The area that the pass is for (if [Enforce Area Capacity Restrictions](#) is toggled on).
- The color-coded day of the week that the pass is for.
- A QR code that can be scanned at the facility.

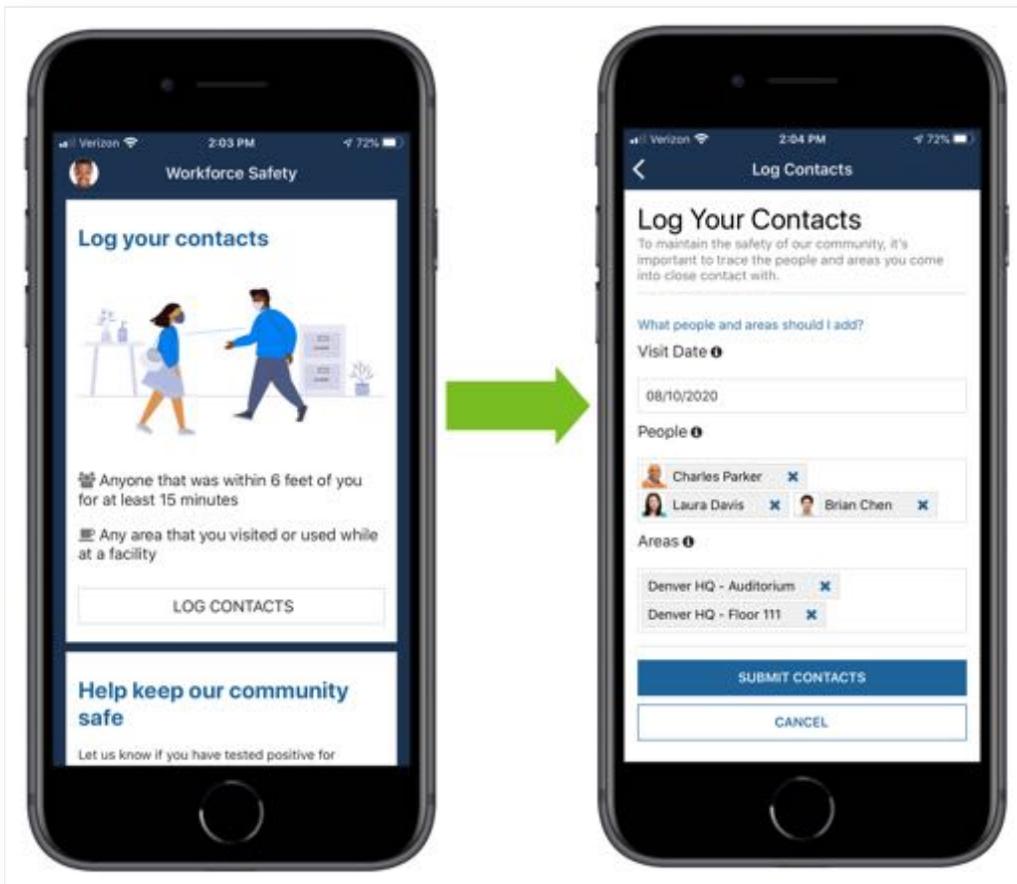
Users can display this pass in the Appian application or from an email that is automatically sent to the user.

Additionally, the active passes for each day, facility, and area that was requested displays.



Logging contacts

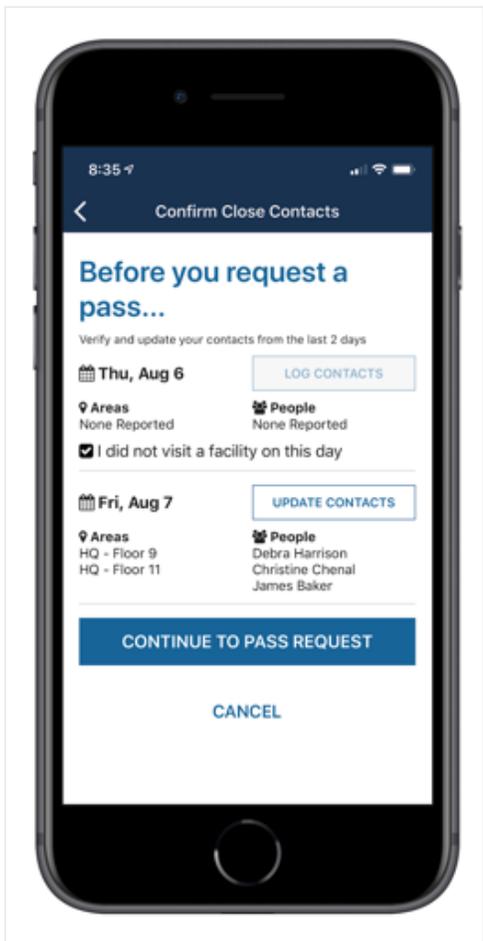
After a user receives a valid pass, a **Log your contacts** section will display on their home page. Clicking **LOG CONTACTS** will allow them to log the people and areas that they had contact with while they were onsite.



Workforce Safety makes it easy for users to log contacts by automatically logging area contacts the user received a pass for and suggesting up to 20 people contacts based on data the solution collects. Users can simply click on a suggested contact to add it to their contact log.

Users are encouraged to log their contacts after each onsite visit in order to keep an accurate account of their close contacts in case they are diagnosed with COVID-19. If the user submits a [COVID-19 isolation incident](#), the information they input here will display to response managers [on the related incident](#).

If the [Contact Reporting When Requesting a Pass](#) feature is toggled on, users will be asked to review any contacts they have logged for their last two visits, or log their contacts if they haven't already done so.

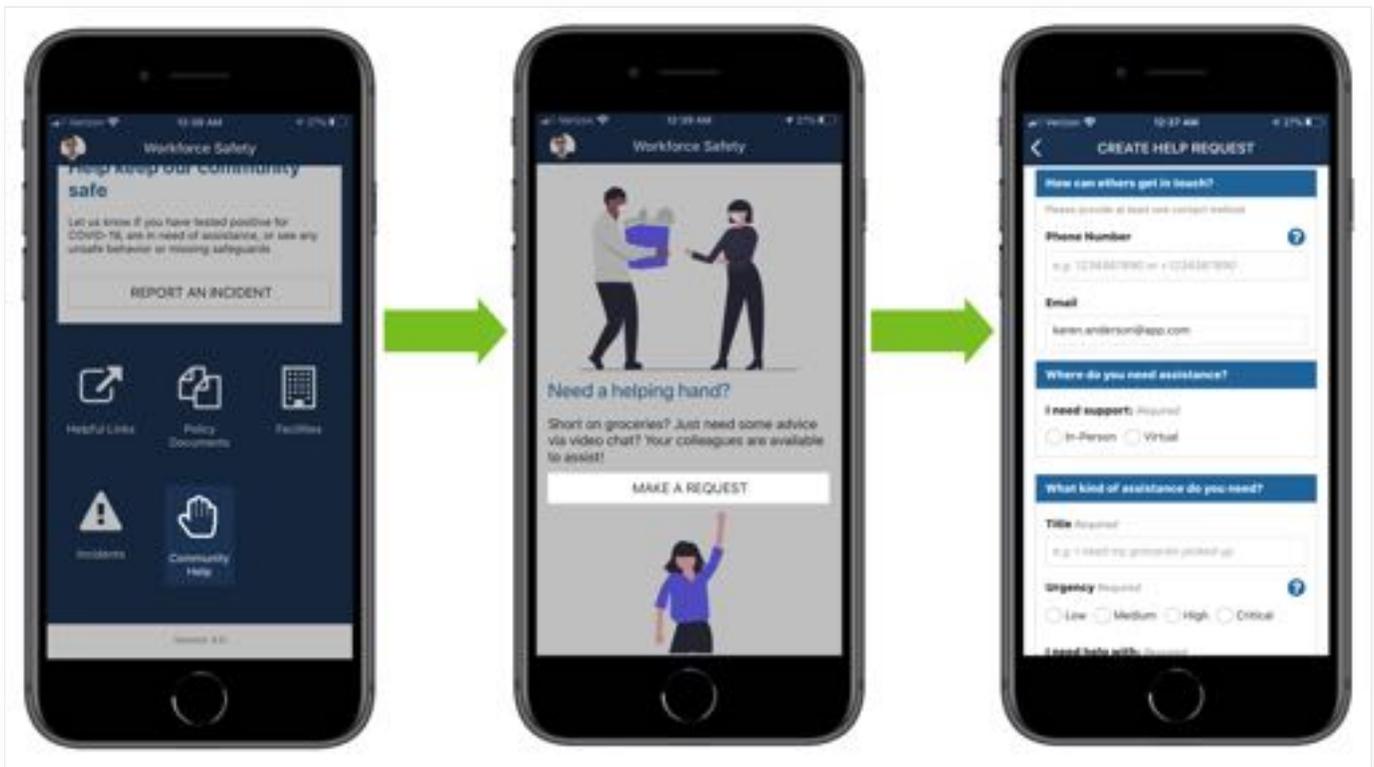


Using community help

If the [Community Volunteering and Help Requests](#) feature toggle is turned on, a Community Help icon will display on the home page. Clicking this will allow users to request help or sign up to volunteer.

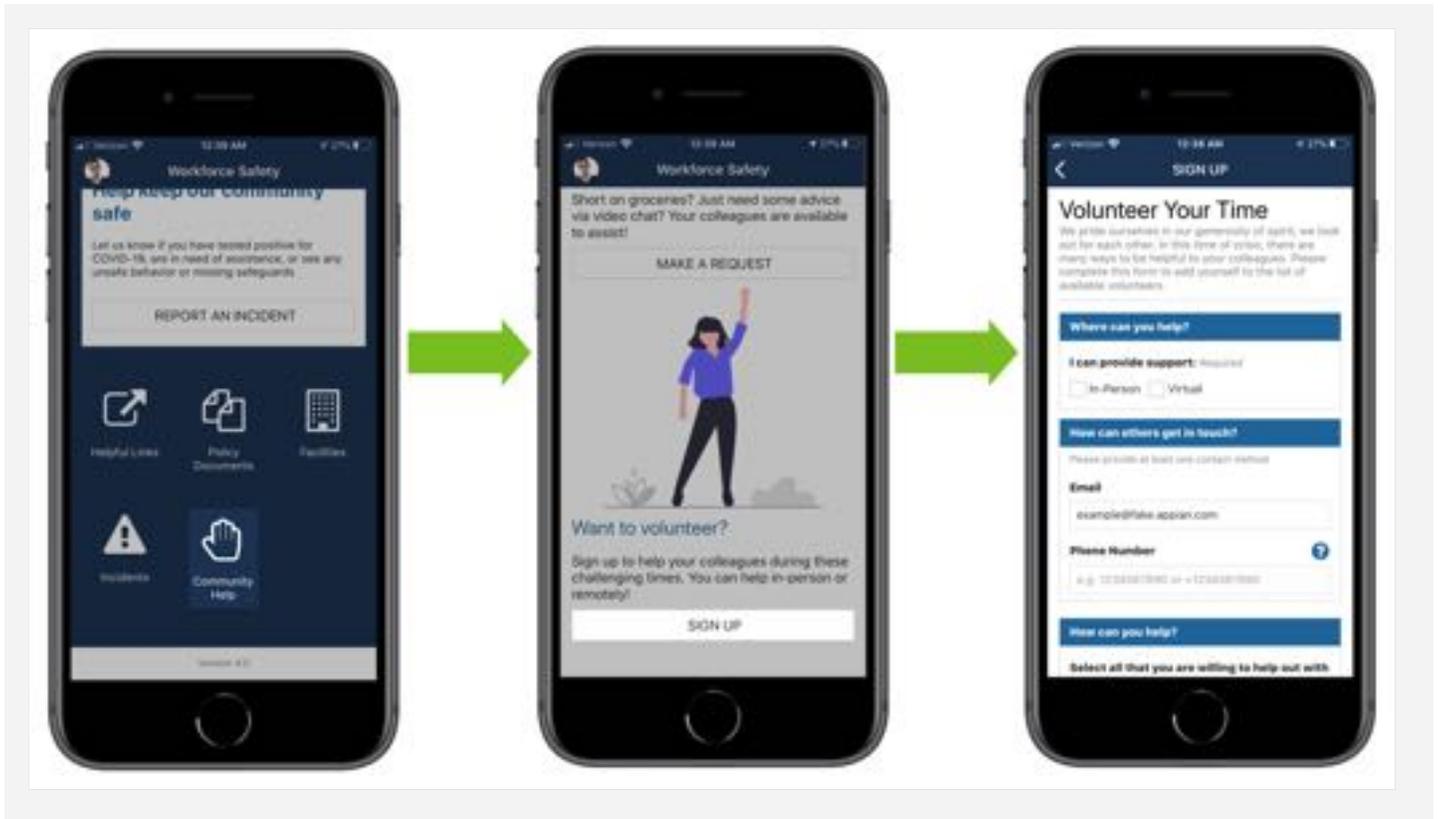
Requesting help

If a user needs assistance from a member of the workplace community, they can submit a help request which can be addressed by a volunteer.



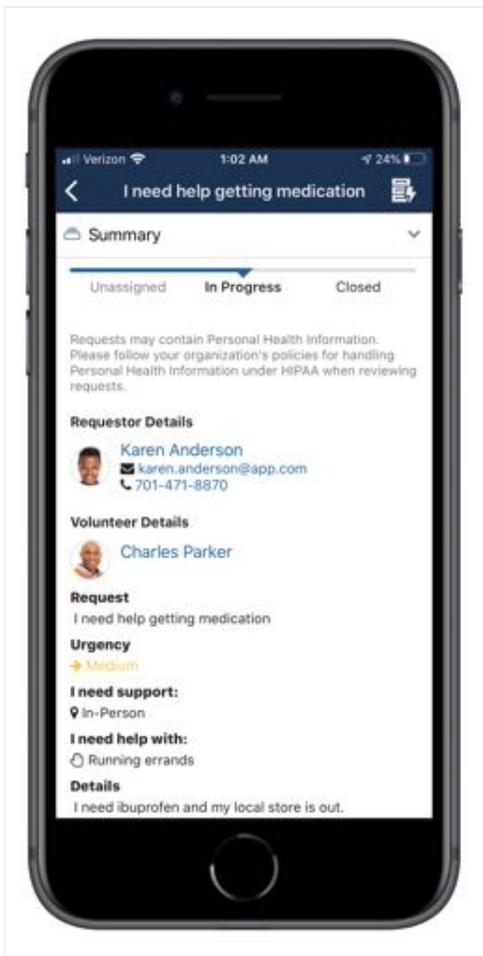
Signing up to volunteer

If the [Community Volunteering and Help Requests](#) feature toggle is active, for users wishing to volunteer, a simple form is provided for them to fill out. Based on their responses, they can be matched with incoming assistance requests to provide the help needed.



Viewing assigned requests

If the [Community Volunteering and Help Requests](#) feature toggle is active and users have signed up to be a volunteer, they can click **View Assigned Requests** to see a grid of help requests assigned to them. When they select a request from the grid, they are taken to the summary view. This view provides information on the status and details of the request, contact information of the requester, and the request location. Requesters may close and cancel requests and assigned volunteers can close requests and decline assignments.



Viewing resources

Resources are available under the **Helpful Links**, **Policy Documents**, and **Facilities** links. These sections contain links to external resources, documents uploaded by your organization and information on your organization's facilities.

Hosting visitors

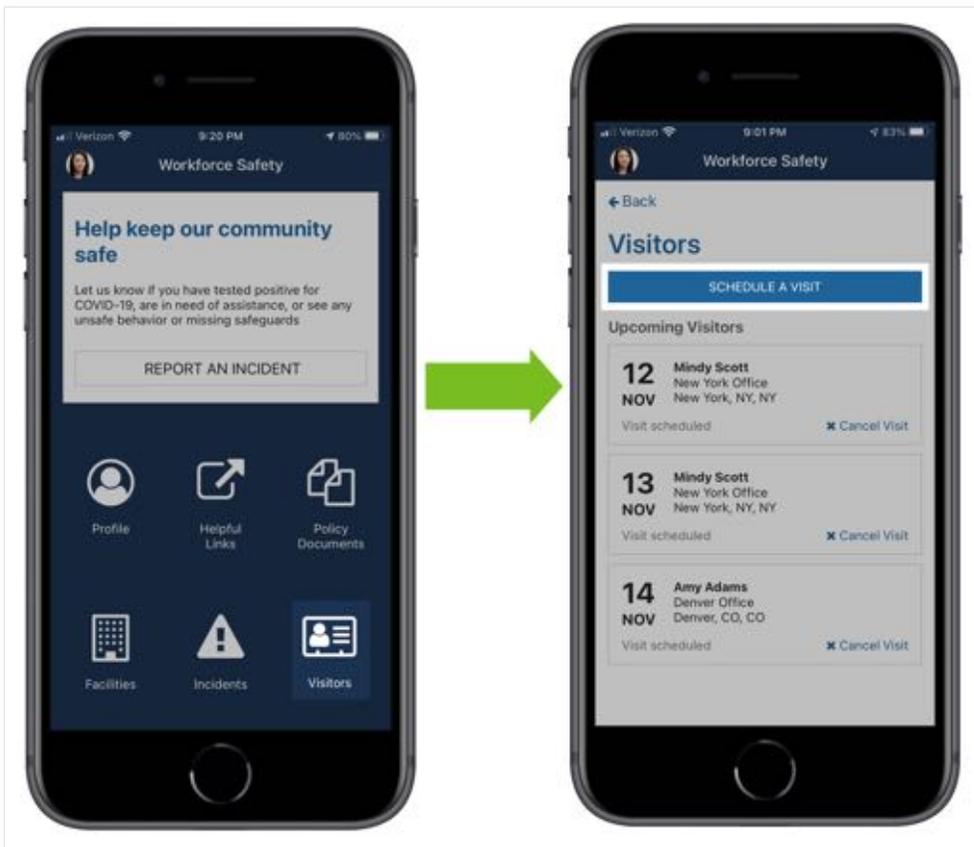
Users can be given access to host visitors. Hosting consists of scheduling visits for visitors and adding new visitors. Hosts can also cancel visits that they have scheduled.

Scheduling visits

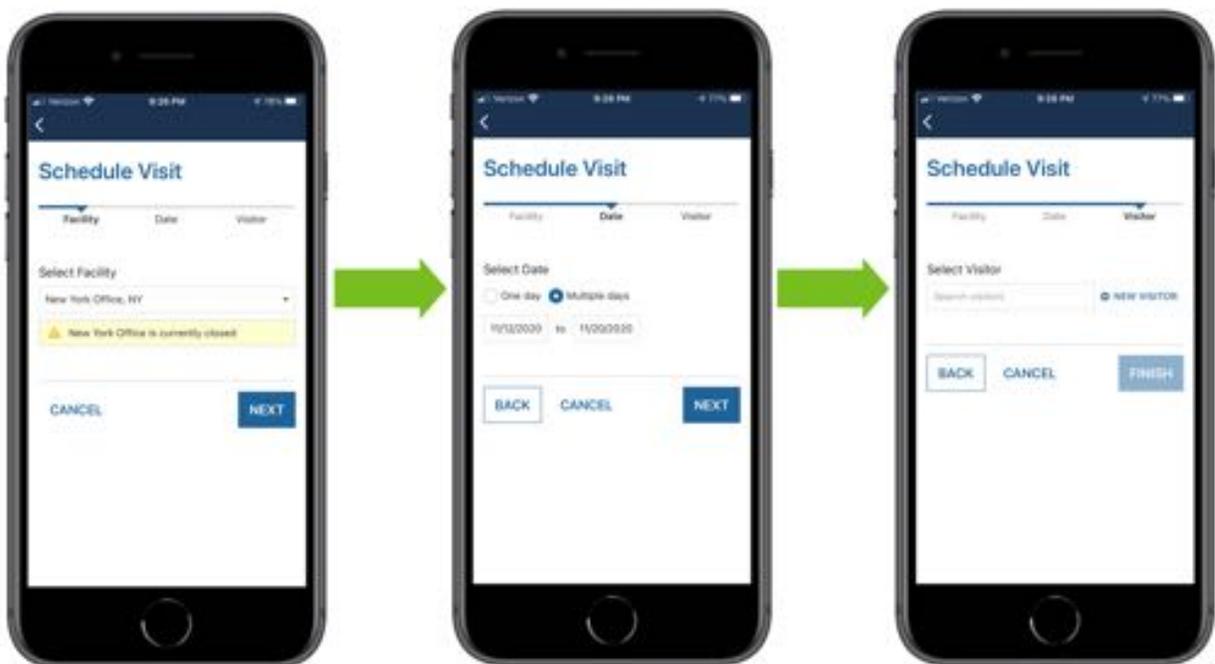
Before a visitor can come on site, they must have a visit scheduled by someone who has been given access to host visitors. All hosts can access this action from the Workforce Safety home page, but screeners and response managers can [schedule visits from the Response Hub](#) as well.

To schedule a visit:

1. On the bottom of the Workforce Safety home page, click the **Visitors** icon.
 - o **Tip:** Only users who have been given access to host will see this icon.
2. Click **SCHEDULE A VISIT**.



3. Select a facility and click **NEXT**.
 - **Tip:** You can select closed facilities since some visitors, such as cleaning and maintenance crews, may still need access to facilities that are closed.
4. Select the day or day range that the visitor should be able to visit and click **NEXT**.
5. Select the visitor.
 - If the visitor is already in the system, find and select them in the **Select Visitor** field.
 - **Tip:** If a message displays that says the visitor is not eligible to visit, it is likely because they are in isolation or have an open incident.
 - If the visitor is new, click + **NEW VISITOR**, then enter a first and last name and an email address and click **ADD**.
 - **Note:** The email address will be the visitor's username.
6. Click **Finish**.



The visitor will need to complete a pass request in order to visit the facility. If they are not eligible to visit based on their responses, the host will receive an email.

Canceling visits

After you schedule a visit for a visitor, it will display when you click the Visitors icon. Here, you can see the status of the visit, such as if the visitor has received a pass to visit the facility. You can also cancel an upcoming visit, if necessary.

To cancel a visit:

1. On the bottom of the Workforce Safety home page, click the **Visitors** icon.
 - **Tip:** Only users who have been given access to host will see this icon.
2. Identify the visit you want to cancel and click **Cancel Visit**.
3. On the next page, click **CANCEL VISIT**.

After a visit is canceled, any active passes that the visitor had will be revoked and the visitor will be sent an email letting them know that the visit was canceled.

Response Hub Overview

Introduction

The Response Hub in Workforce Safety allows certain users to see and manage the health and work status of employees and facilities in one central location that's updated in real-time.

The Response Hub is organized into [Incidents](#), [Activity](#), [People](#), [Reports](#), and [Configure](#) pages.

This page describes what information and actions are in the Response Hub.

See also

- For instructions on how to use the Response Hub, see the [Response Hub User Guide](#).
- For instructions on how Response Hub users can configure Workforce Safety, see the [Configuration Guide](#).
- For a list of what actions and information users have access to in the Response Hub, see the [Groups Reference Page](#).

Response hub personas

Every organization should have a response manager that oversees the day-to-day activities of the Response Hub. Your organization can also decide to use any or all of the following personas that have access to different information and actions in the Response Hub.

Persona	Description	Group
Response Managers	Response managers respond to incidents and manage COVID-19 testing and contact tracing for their organization. They can also view reports for their people, facilities, and incidents to provide real-time insight into the situation. Additionally, they can tailor the application to suit the organization's needs.	Workforce Safety Response Managers
Coordinators	If the Community Volunteering and Help Requests feature is toggled on, members of this group can see all incoming help requests and match them to volunteers. They can also view reports to see how they can best distribute resources to those in need.	Workforce Safety Coordinators
Screeners	Members of this group can scan user passes and request passes on behalf of users.	Workforce Safety Screeners
Facility Managers	Facility managers can help take on the responsibility of maintaining the facilities, departments, and areas for an organization.	Workforce Safety Facility Managers

Persona	Description	Group
Configuration Managers	Configuration managers can tailor the application to suit the organization's needs without seeing user data.	Workforce Safety Configuration Managers
Administrators	Administrators can configure Data Management to archive data and can add and remove users from groups. Although they have access to the Response Hub to perform these functions, they can't see any of the data in the Response Hub.	Workforce Safety Administrators

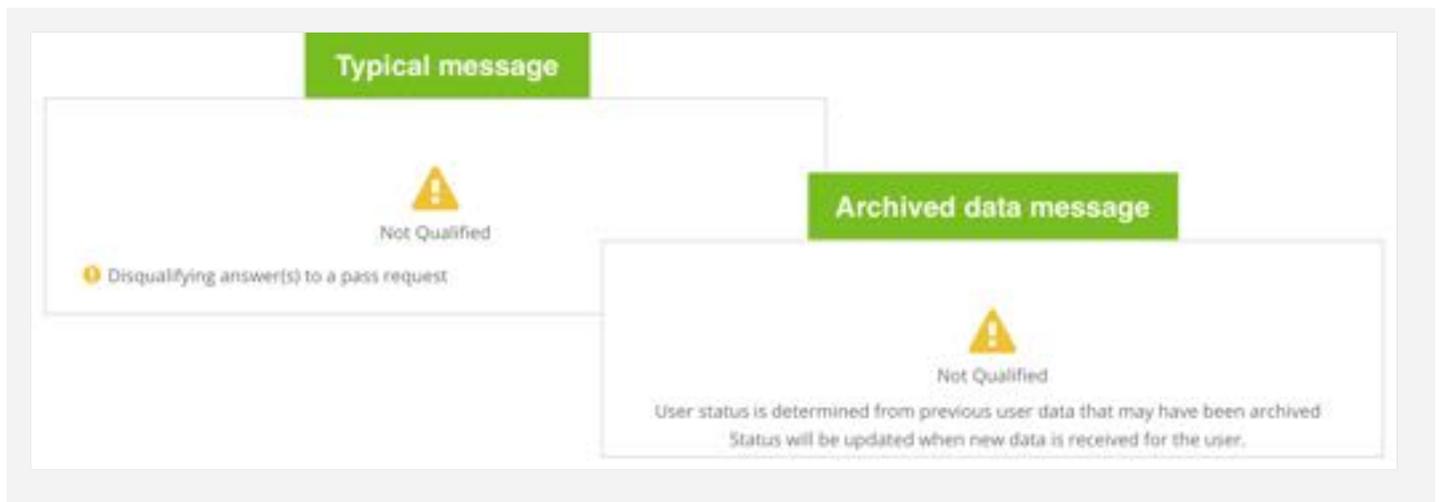
See the [Groups Reference Page](#) for more information on which groups have access to what content in Workforce Safety.

Archived data

Administrators can [configure data management](#) to automatically archive data after a defined period of time. This can optimize Workforce Safety performance and improve the user experience.

If you think you are missing data in a Response Hub report, contact an administrator. They have the ability to restore any archived data, as well as tell you which data is being archived.

Additionally, when data is archived that affects a user's status, their status will remain the same, but the reason for that status may not be available. For example, if a user is in a *Not Qualified* status, but their last pass request is archived, the reason for why they were in that state cannot be displayed.



Manage your incidents

Incidents are how you resolve issues for your employees. They can be created automatically, such as through questionnaire responses, or manually to report issues or COVID-19 positive diagnoses, isolations, and exposures.

Incidents are so important to how you manage crises, that we put it front and center in the Response Hub.

When you log in to the Response Hub, the **INCIDENTS** page displays. From here, you can view all incidents that have been reported for your organization and view review a queue of vaccination verifications from your employees.

Status	Incident ID	Type	Assignee	Impacted Person	Facility	Department	Last Updated
	48	Pass Request Response	Unassigned	Ben Johnson	Appian HQ	Human Resources	Aug 23 2:19PM
	1	Pass Request Response	Sharon White	Freddie Anderson	Denver Office	Human Resources	Jun 14 9:39PM
	4	Pass Request Response	Sharon White	Arturo Jaylan	New York Office	Marketing	Jun 14 9:39PM
	9	Pass Request Response	Sharon White	Griffin Lennix	Appian HQ	Operations	Jun 14 9:39PM
	10	Pass Request Response	Sharon White	Charlie Stephen	New York Office	Information Technology	Jun 14 9:39PM
	11	Pass Request Response	Sharon White	Paul Garrett	Appian HQ	Human Resources	Jun 14 9:39PM
	14	Pass Request Response	Sharon White	Karen Anderson	Appian HQ	Information Technology	Jun 14 9:39PM
	17	Pass Request Response	Sharon White	Lyla Luis	Appian HQ	Human Resources	Jun 14 9:39PM
	18	Pass Request Response	Sharon White	Angela Lewis	Appian HQ	Finance	Jun 14 9:39PM
	19	Pass Request Response	Sharon White	Khalid Max	Boston Office	Human Resources	Jun 14 9:39PM

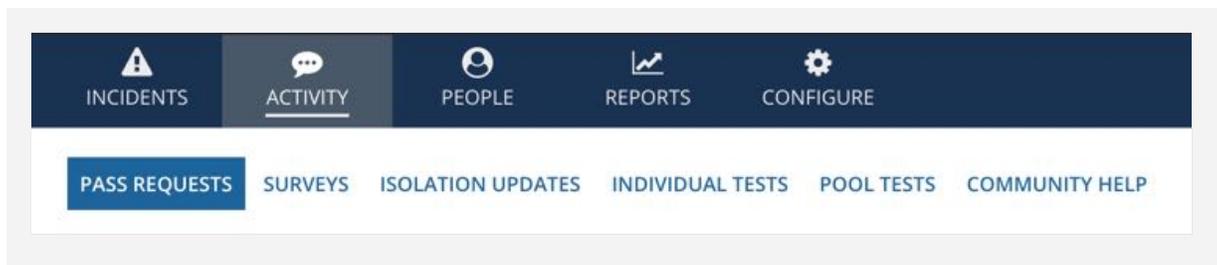
On this page you can:

1. Verify proof of employee vaccination.
2. Search and filter the incidents list.
3. Export the list to Excel.
4. Save and manage your filters.
5. Refresh the list.
6. Access and view more details about an incident.
7. Report an incident.
8. Update an incident.

Keep track of Workforce Safety activities

The **ACTIVITY** page houses tabs that contain:

- All questionnaire responses, including **PASS REQUESTS**, **SURVEYS**, and **ISOLATION UPDATES**.
- All test requests, including **INDIVIDUAL TESTS** and **POOLED TESTS**.
- If the [Community Volunteering and Help Requests](#) feature is toggled on, a **COMMUNITY HELP** report, including a list of all Help Requests.



Pass Requests

The **PASS REQUESTS** tab shows all of the pass requests that have been submitted for your organization.

The screenshot shows the 'PASS REQUESTS' dashboard with various navigation tabs and search filters. A table lists pass requests for three users: George Garcia, Sally Taylor, and Daniel Nelson. Each row includes details on department, facility, incident status, pass eligibility, and dates.

User	Department	Facility	Incident Created	Pass Eligibility	Facility Pass Generated	Pass Scanned	Pass Date	Request Date
George Garcia	Human Resources	Denver Office	No	Qualified	Yes	No	Dec 18	Dec 17, 2020 5:56 PM
Sally Taylor	Marketing	USA HQ	No	Qualified	Yes	No	Dec 15	Dec 15, 2020 4:11 PM
Daniel Nelson	Operations	Denver Office	No	Qualified	Yes	No	Dec 15	Dec 15, 2020 3:00 PM

From this tab, you can:

1. Search and filter the list of pass requests.
2. Access and view the **Pass Request FAQs**.
3. Export the list to Excel.
4. Save and manage your filters.
5. Refresh the list.
6. Request a pass on behalf of a user.
7. Schedule a visit for a visitor.
8. Access and view a user's pass requests details and history.

The screenshot shows the 'Pass Request' details for George Garcia. It includes a calendar view on the left and a list of health-related questions with 'Yes' or 'No' answers. The request is marked as 'Certified' and was submitted on Dec 17, 2020.

Pass Request Submitted On: Dec 17, 2020 5:56 PM Facility: Denver Office **Certified**

- Have you tested positive for COVID-19 by a medical professional? **No**
- Has your temperature been less than 99.9 F or 37.7 C without the use of fever-reducing medications, for the last 3 days? **Yes**
- Do you currently exhibit any respiratory symptoms of COVID-19 (e.g., cough, shortness of breath)? **No**
- Are you or any of the person(s) in your household experiencing symptoms (i.e., fever, cough, or shortness of breath) or, or tested positive for, COVID-19? **No**
- Are you currently caring for anyone who is sick with possible COVID-19 symptoms? **No**
- Have you been in close contact with others from outside your household within the last 14 days? **No**
- Have you recently returned from traveling abroad within the last 14 days? **No**
- Do you feel sick? **No**

Surveys

The **SURVEYS** tab displays all of the surveys that have been submitted for your organization.

The screenshot shows the 'SURVEYS' dashboard with search filters and a table of survey submissions. The table lists users, their pass eligibility, incident status, and submission dates.

User	Pass Eligibility	Incident Created	Submitted On
George Garcia	Qualified	No	Dec 17, 2020 5:55 PM
Donna Miller	Not Qualified	No	Dec 17, 2020 4:54 PM
Phillip Sanchez	Qualified	No	Dec 17, 2020 4:47 PM
Paul Rao	Qualified	No	Dec 17, 2020 4:46 PM

From this tab, you can:

1. Search and filter the list of surveys.
2. View the logic that is used to determine how the **Status Pending**, **Isolated**, **Qualified**, and **Not Qualified** statuses are determined by clicking **explanation** next to **Pass Eligibility**.
3. Access and view user's survey details.

Isolation updates

The **ISOLATION UPDATES** tab displays all of the isolation updates that have been submitted for your organization.

The screenshot shows the 'ISOLATION UPDATES' tab selected in a navigation menu. The interface includes search filters for 'User', 'Request Date' (12/03/2020 to 12/17/2020), 'Department', and 'Incident Created'. A table below lists users and their submission details.

User	Submitted On	Incident Created
Charles Parker	Dec 17, 2020 8:06 PM	No
Anthony Hill	Dec 10	Yes
Edward Phillips	Dec 10	Yes
Charles Parker	Dec 10	Yes
David Evans	Dec 10	Yes
Laura Davis	Dec 10	Yes
Sarah Robinson	Dec 10	Yes
Sharon White	Dec 10	Yes
Lisa Walker	Dec 10	Yes

From this tab, you can:

1. Search and filter the list of isolation updates.
2. Access and view a user's isolation history and details.

Individual Tests and Pooled Tests reports

There are two reports that contain all of the test requests in Workforce Safety: the **INDIVIDUAL TESTS** report and the **POOL TESTS** report.

The screenshot shows the 'INDIVIDUAL TESTS' report. It features search filters for 'Request Name', 'User', 'Request Status', 'Result', 'Test Requested On', and 'Sample Collection Date'. Below the filters are buttons for 'PROVIDE TEST RESULT' and 'CANCEL TEST REQUESTS'. A table displays a list of test requests with columns for Request, User, Request Name, Request Status, Test Requested On, Sample Collection Date, Result, and Lab Result.

Request	User	Request Name	Request Status	Test Requested On	Sample Collection Date	Result	Lab Result
25	Amy Lee	HR Dept Test Request	Completed	Sep 13, 2020 5:24 PM	Sep 13 2020	Negative	📄
26	Brian Chen	HR Dept Test Request	Pending Verification	Sep 13, 2020 5:24 PM	Sep 13 2020	Positive	📄
27	Maria Lopez	HR Dept Test Request	Pending User Acknowledgement of Request	Sep 13, 2020 5:24 PM	-	-	-
24	Angela Lewis	Single Test Request for Angela Lewis	Completed	Sep 11, 2020 3:07 AM	Sep 11 2020	Positive	-

You can do the following on these reports:

1. Filter the list of test requests.
2. If you select one test request, you can provide a test result for it.
3. If you select one or more test requests, you can cancel them.
4. View a summary of the test results by clicking the test request number.
5. Download lab results.

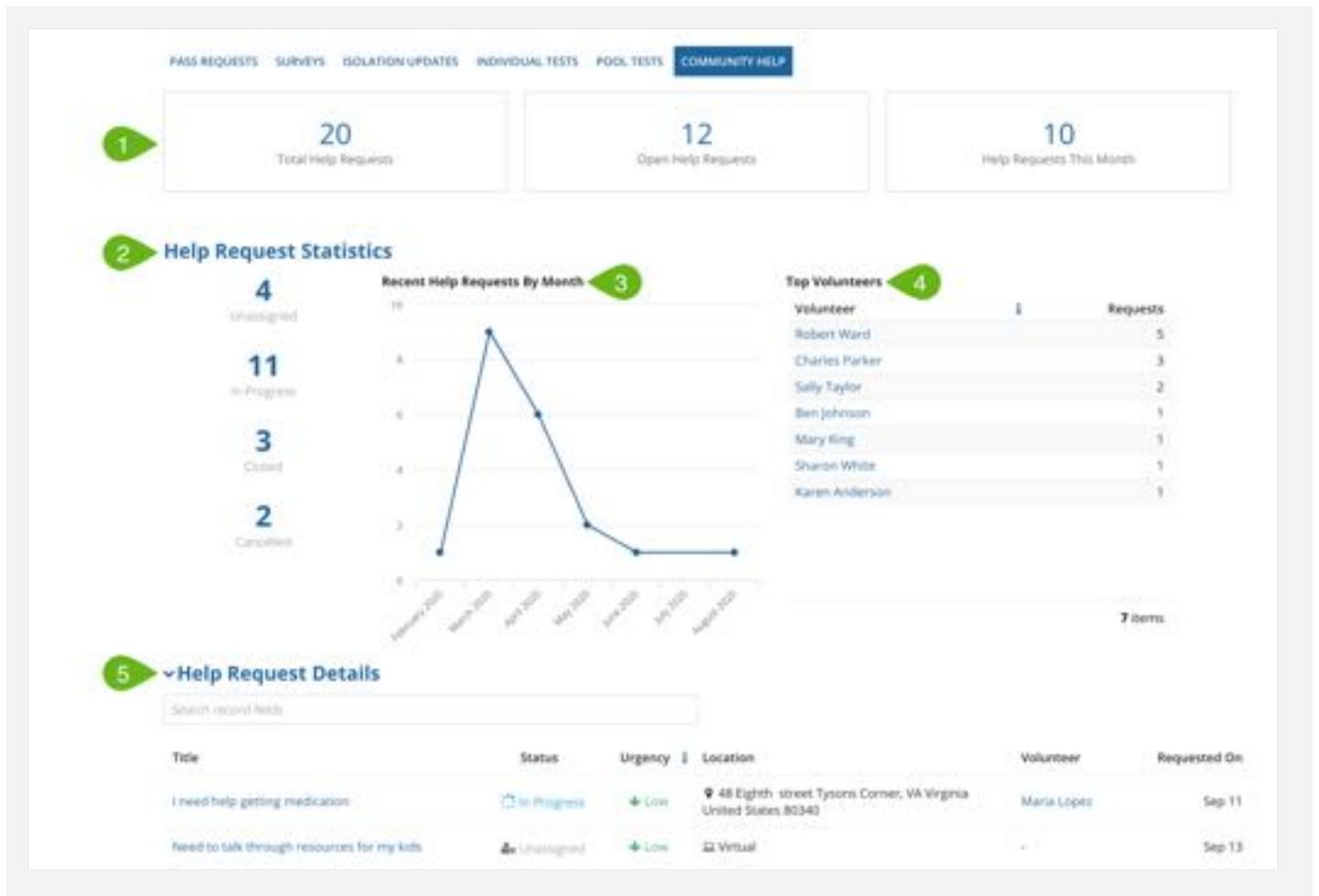
Testing statuses

COVID-19 test requests can be in the following statuses:

- **Pending User Acknowledgment of Request:** The test request has been sent to the user but they have not acknowledged the request yet.
- **Pending Result:** The user has acknowledged the test request, but they have not submitted their result yet.
- **Pending Verification:** The user has submitted their result, but a response manager needs to verify the result.
- **Completed:** The test request process is complete for this user.
- **Canceled:** The response manager canceled the test request.

Community Help report

If the [Community Volunteering and Help Requests](#) feature is toggled on, you can use the **COMMUNITY HELP** report to help manage user help requests and volunteers.



This report shows:

1. Help request metrics.
2. Help request statistics.
3. Help requests by month line graph.
4. Top volunteers list.
5. A searchable list of help requests.

Viewing help requests

Clicking a help request title displays details of the help request.

I need help getting medication

REASSIGN UPDATE REQUEST CANCEL -- >

Summary Related Actions

Unassigned In Progress Closed

Requests may contain Personal Health Information. Please follow your organization's policies for handling Personal Health Information under HIPAA when reviewing requests.

Requestor Details

 **Karen Anderson**
 karen.anderson@app.com
 701-471-8870

I need help getting medication

➔ Medium

📍 In-Person

📋 Running errands

I need ibuprofen and my local store is out.

📍 123 Main St Annapolis, MD

Volunteer Details

 **Charles Parker**
 charels.parker@app.com

2 Comments

 **System Admin**
 Wednesday 3:31 pm
 Status changed to: Unassigned

 **System Admin**
 A moment ago
 Request matched with volunteer

Write a comment...



COMMENT

For each help request, there are several actions you can take:

- For *unassigned* requests, you can **MATCH WITH VOLUNTEER** to assign the request to a volunteer.
- For *assigned* requests, you can **REASSIGN** the request to a different volunteer or **CLOSE** the request when it has been completed.

Submitters of help requests, can **UPDATE REQUEST**, **CANCEL**, or **CLOSE** their own requests. A help request can only be updated or cancelled by the original requestor.

I need help getting medication

UPDATE REQUEST CANCEL CLOSE

Summary Related Actions

Unassigned In Progress Closed

Requests may contain Personal Health Information. Please follow your organization's policies for handling Personal Health Information under HIPAA when reviewing requests.

Requestor Details

 **Brian Chen**
 brian.chen@app.com

I need help getting medication

Volunteer Details

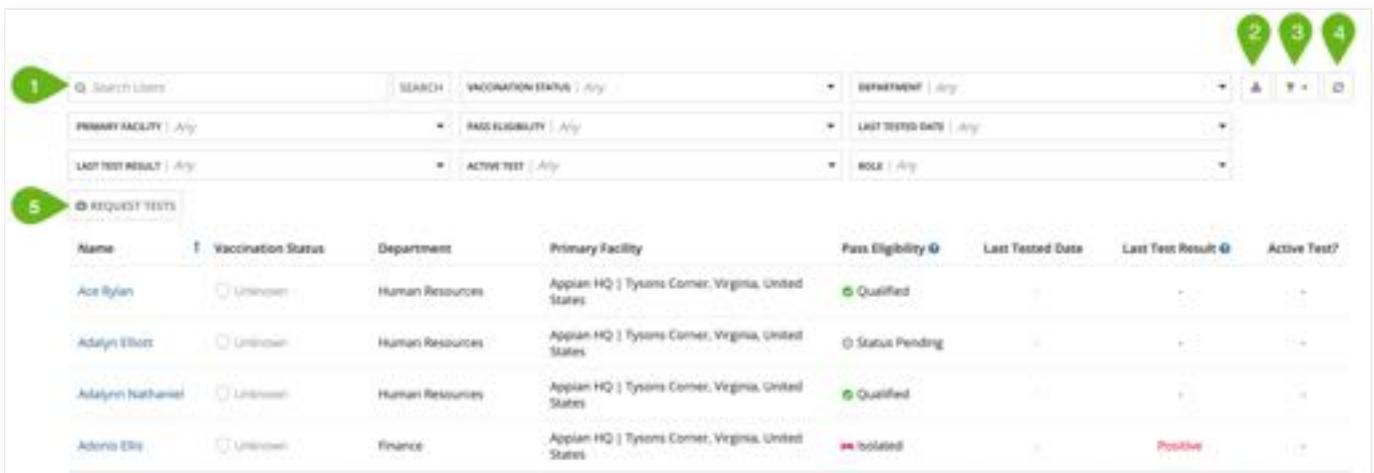
 **Maria Lopez**
 maria.lopez@app.com

2 Comments

 **System Admin**
 Friday 2:58 pm

View and manage your people

The **PEOPLE** page displays all users in Workforce Safety.



On this page you can:

1. Filter the list of users.
2. Export the list to Excel.
3. Save and manage your filters.
4. Refresh the list.
5. Request tests.

You can also view the vaccination status and pass eligibility status of every user in Workforce Safety.

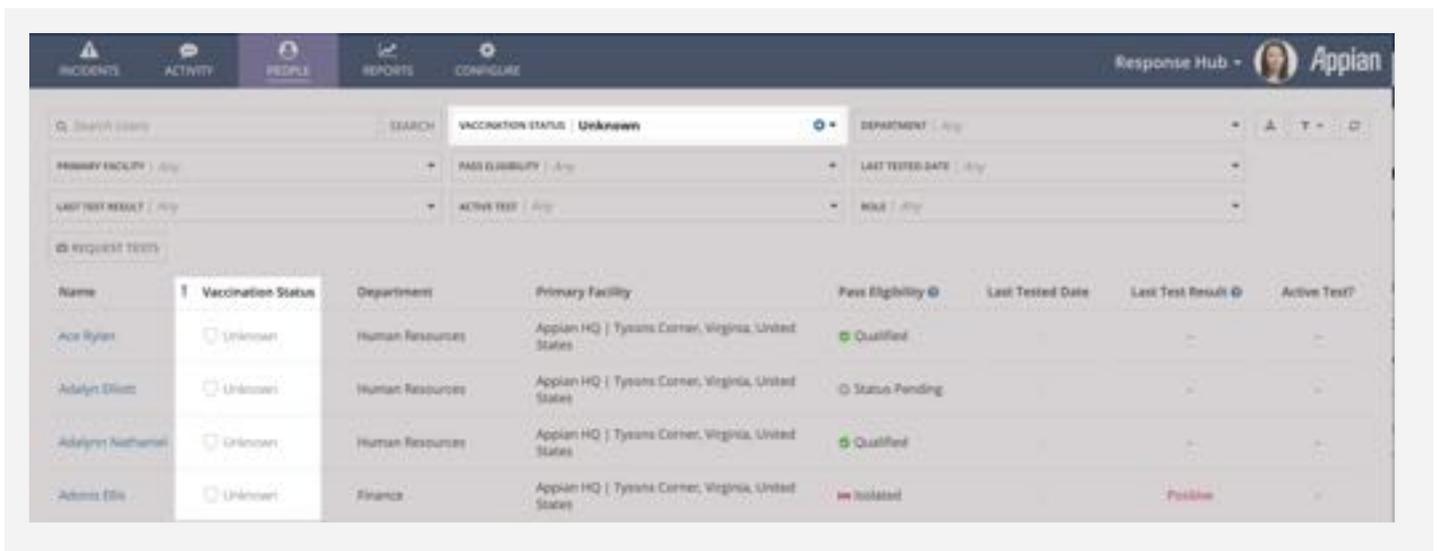
User vaccination statuses

If you have **VACCINATION INSIGHTS** enabled and configured, the **PEOPLE** page allows you to filter users by their vaccination status. You can use this data to determine which users have been partially or fully vaccinated, as well as which users have not received the COVID-19 vaccine or provided information about their vaccination status.

Users can have the following vaccination statuses:

- **Waiting for vaccine:** User intends to receive the COVID-19 vaccine and may be on a COVID-19 vaccination waitlist.
- **Partially vaccinated:** User has received a COVID-19 vaccine dose and is waiting to receive further doses.
- **Fully vaccinated:** User has completed a COVID-19 vaccine dose series.
- **Not intending to be vaccinated:** User has indicated they do not plan to get the COVID-19 vaccine.
- **Prefer not to answer:** User prefers not to provide any COVID-19 vaccine health information.
- **Unknown:** User has not filled out the COVID-19 vaccination questionnaire.

You can use the **VACCINATION STATUS** filter to filter the list of users in Workforce Safety to display only the users you want to see. For example, if you want to see a list of all users who have not completed the vaccination status survey, select **UNKNOWN** as the vaccination status.



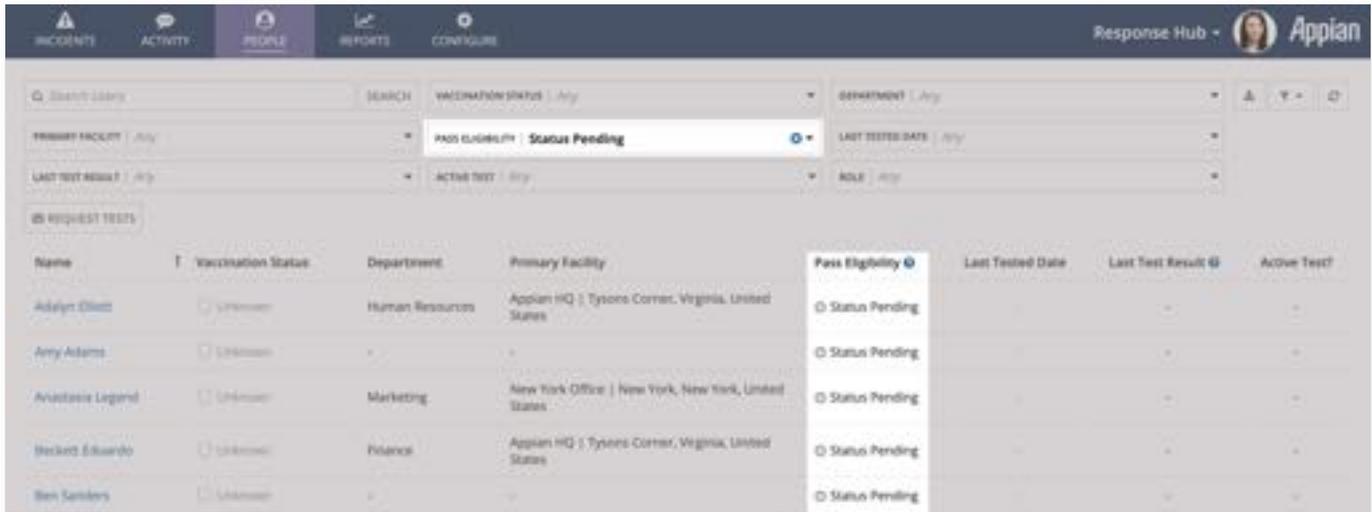
User pass eligibility statuses

Users can have the following pass eligibility statuses:

- **Qualified:** User can request a pass.

- **Not Qualified:** User cannot request a pass.
- **Isolated:** User is in isolation and cannot complete a survey or request a pass. Instead they are asked to complete an isolation update.
- **Status Pending:** User has not filled out a survey or pass request.

You can use these statuses to filter various lists in the Response Hub. For example, if you want to see a list of all users who have not requested a pass or filled out a survey, just filter the list of users on the People page by **PASS ELIGIBILITY: Status Pending**.



User summary

Clicking on a name from anywhere in the Response Hub opens their user summary.

Summary tab

The **Summary** tab contains various information about the user.

Note that while most groups that have access to the Response Hub can see this Summary tab for each user, the information that they see is different depending on which group they are in. Additionally, sections that aren't applicable to visitors do not display on user summaries for visitors.

From this tab, depending on the access that your group has, you can perform the following actions:

1. **ISOLATE USER, REMOVE USER FROM ISOLATION, or SKIP SURVEY**, depending on the status of the user.
2. **REQUEST PASS** on behalf of the user.
3. Update the user's profile, which includes the following fields:
 - o Position: Full-time remote or Office based.
 - o Can you work from home?
 - o Department.
 - o Primary Facility.
4. **DELETE USER DATA** to delete all of a user's pass request and survey responses, help requests, incidents, or volunteer information.
5. **REQUEST A TEST** for a user. You can also click the Testing Status card to go directly to the user's test record.

Additionally, the **Summary** tab displays the user's pass eligibility status and the user's vaccination status. If the user's pass eligibility status is in a **Disqualified** state, the reason for their state displays in the User Status card.

Questionnaire tabs

The user summary also has **Pass Requests**, **Isolation Updates**, and **Surveys** tabs that have records of each user's pass request, survey, and isolation update responses.

Community Help tab

If the [Community Volunteering and Help Requests](#) feature option is toggled on, you will have access to the **Community Help** tab for each user.

If a user has signed up to volunteer, this tab displays the volunteer categories that they said they could help with along with any help requests that are assigned to them.

All help requests that a user has submitted will also display.

Brian Chen

Summary | Pass Requests | Isolation Updates | Surveys | **Community Help** | Related Actions

Volunteer Capabilities - both In-Person and Virtual

- Running errands
- Working together (at least 6 feet apart)
- Transportation
- Help before or during a meeting
- Touch base or sounding board

Submitted Help Requests

Request	Status	Urgency
I need help getting medication	In Progress	Low

Assigned Help Requests

Request	Requested By	Status	Urgency
Need to talk through resources for my kids	Angela Lewis	In Progress	Low

Related Actions tab

The **Related Actions** tab displays all of the actions that you can perform for a user.

Ace Rylan

INCIDENTS | ACTIVITY | **PEOPLE** | REPORTS | CONFIGURE

Summary | Pass Requests | Isolation Updates | Surveys | Community Help | **Related Actions**

- Skip Survey
- Isolate User
- Request Pass
- Update Profile
- REQUEST A TEST
- Delete User Data

View your reports

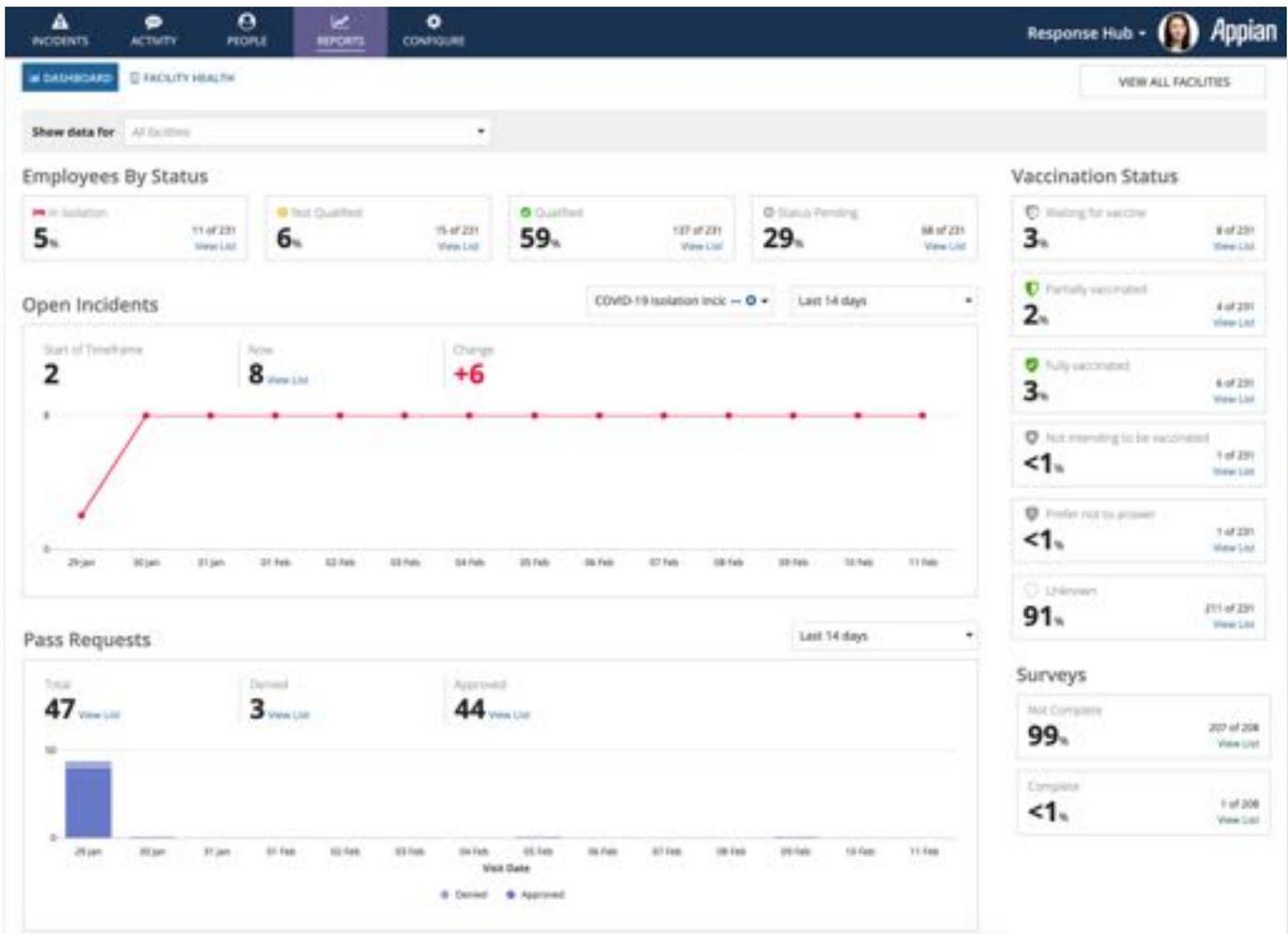
The **Reports** page displays important insights and data about how COVID-19 incidents are impacting the health of your people and your facilities. The data on this page is divided into three tabs:

- **DASHBOARD Tab:** Displays people, incidents, vaccination, and activity data for a single facility or multiple facilities in your organization.
- **FACILITY HEALTH Tab:** Displays status and trend data for a single facility or multiple facilities in your organization.
- **COVID-19 & VACCINATION HISTORY:** Displays your organization's COVID-19 and vaccination health data for one or more facilities.

Go to the **Reports** tab to analyze this data and use it to help you make important decisions about facility closures and reopenings. You can also use the report data to help you identify any operational adjustments you need to make to ensure your organization's COVID-19 response keeps your employees safe.

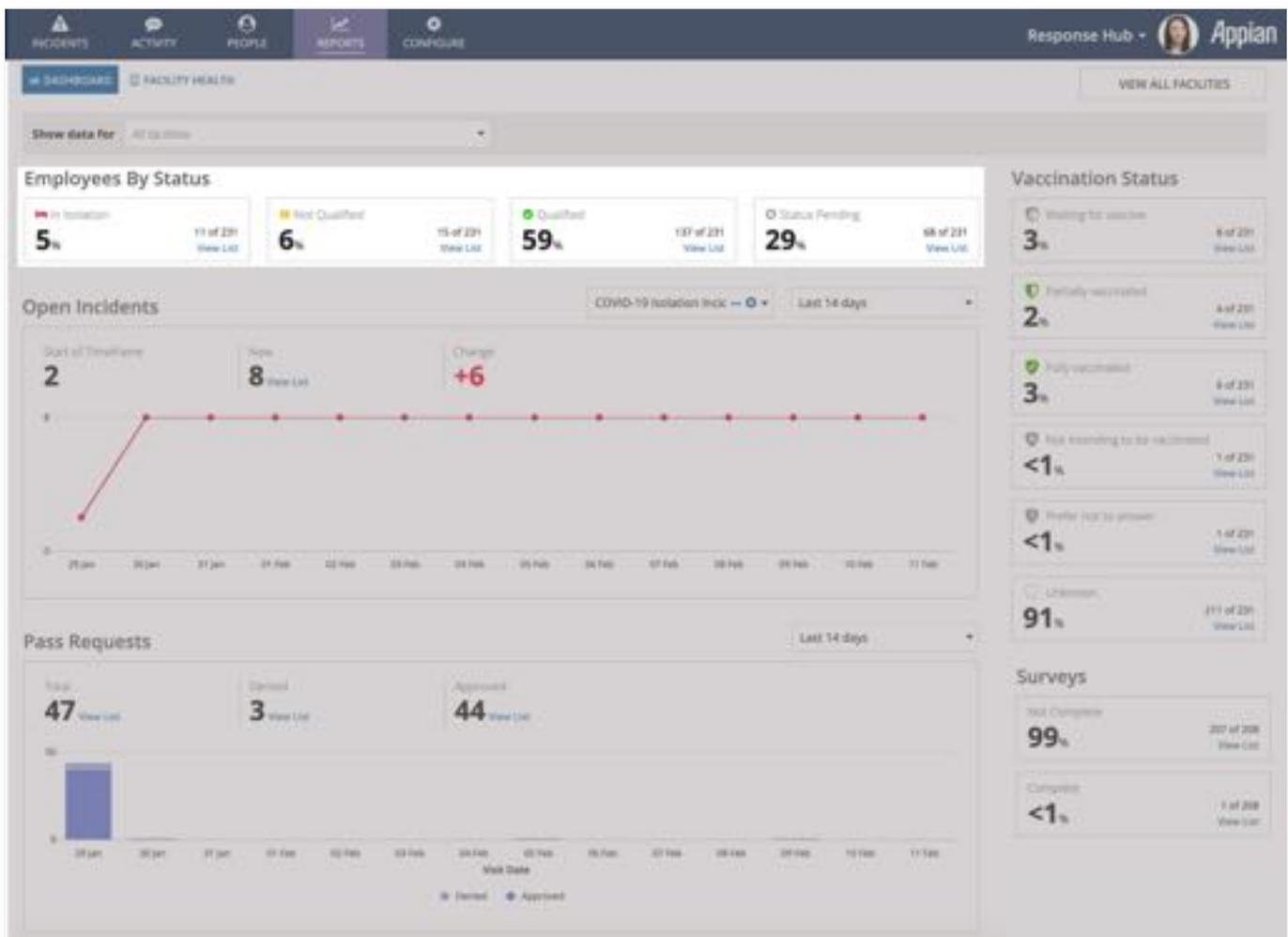
View the dashboard data

The Dashboard tab reports provide real-time people and activity data across five critical areas in your organization: **Employees By Status**, **Open Incidents**, **Vaccination Status**, **Pass Requests**, and **Surveys**.



Employees By Status report

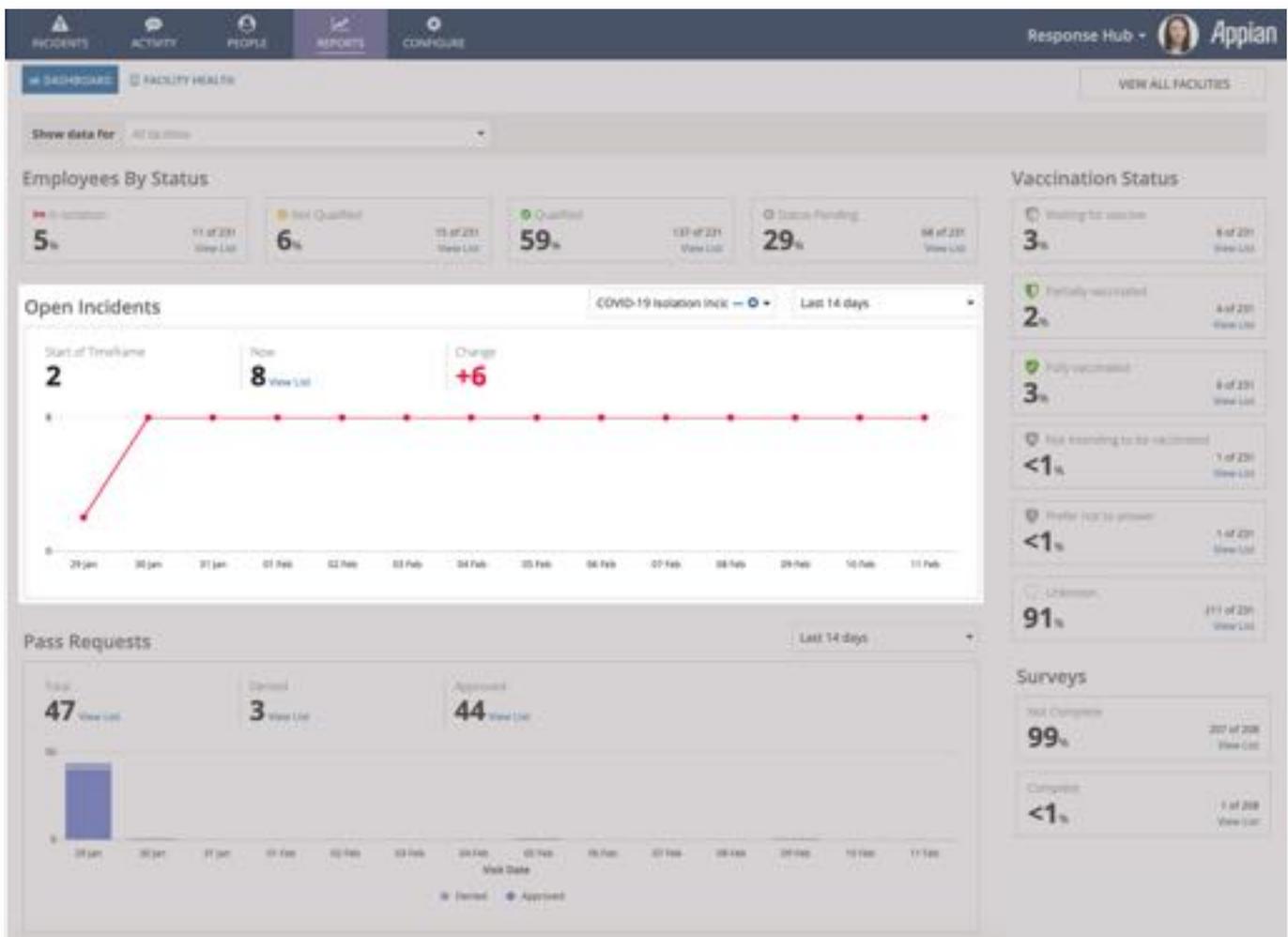
The **Employees By Status** report allows you to see a breakdown of all of your users by their pass eligibility status, excluding visitors.



Quickly assess the percentage of users by pass eligibility status: **In Isolation**, **Not Qualified**, **Qualified**, and **Status Pending**. To view more details about the eligibility status of your users, simply click **View List** to see an exportable list of users behind each number. You can filter the data in this section using the **Show data for** filter at the top of the page, which allows you to view the data for a single facility or multiple facilities in your organization.

Open Incidents report

The **Open Incidents** report displays key indicators that show how open incidents are trending across your organization over a specific period of time. In this section, you can view statistical data and changes in the number of open incidents for one or more facilities.



Use this report to quickly analyze and understand:

- The number of current open incidents across all of your facilities
- Hotspots for COVID-19 isolation incidents across your organization
- Changes in open incidents across a 7-day period
- The number of open incidents at a given point in time
- Open incident trends for a given period of time

View only the data for the facilities you want to see by selecting one or more facilities in the **Show data for** dropdown. Use the **Incident Types** dropdown to filter the **Open Incidents** report and track different incident types. Use the **Date Range** picker to filter the report and display only the open incident data you want to view for a specific period of time. Valid ranges include:

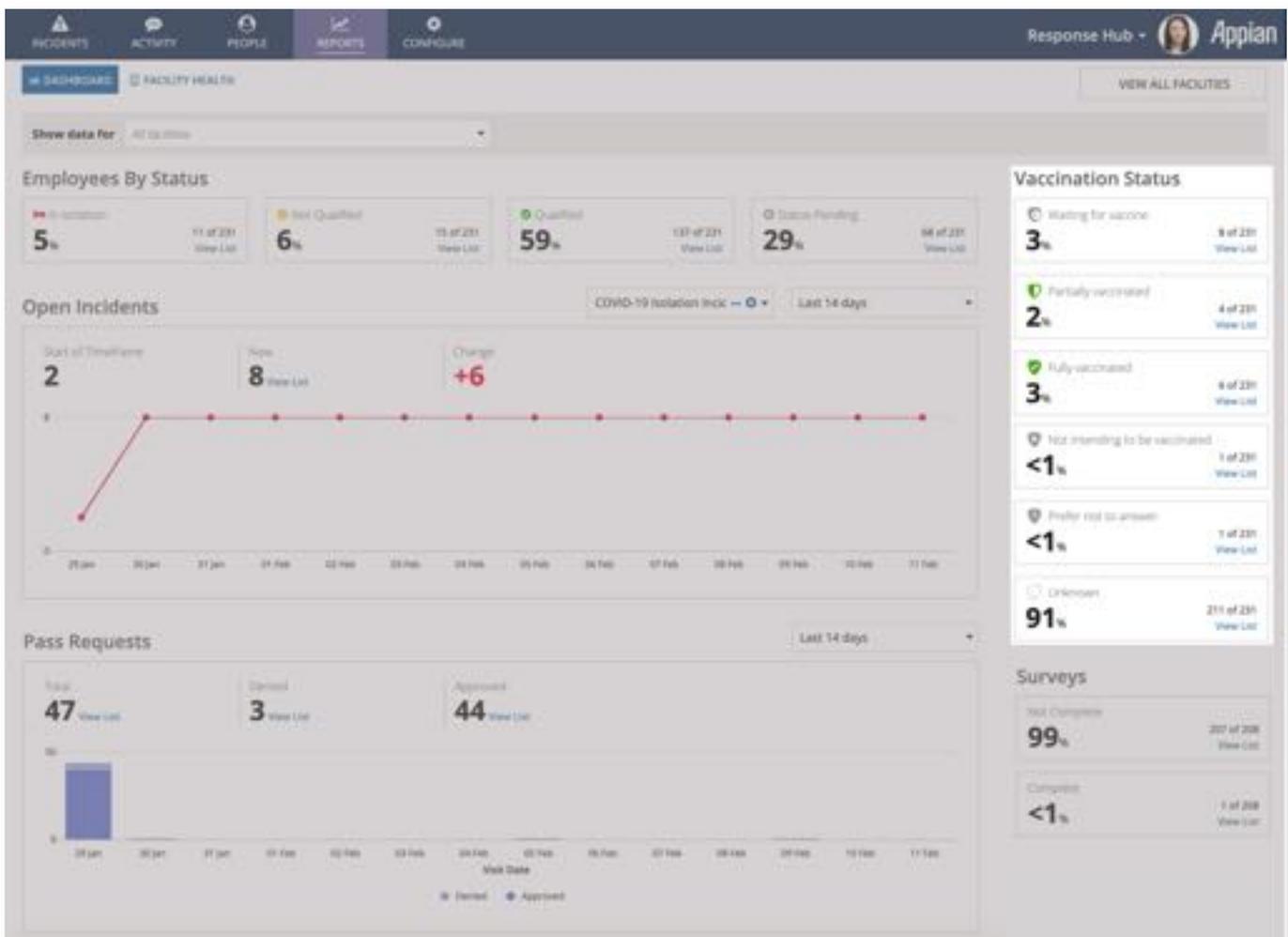
- Last 7 days
- Last 14 days
- Last 30 days
- Last 60 days
- Last 90 days

When you need to see more details about your organization's current incidents, simply click **View List** in the **Current** incident count section to access a list of incidents behind the open incident count.

This open incidents data will only begin to populate after you upgrade to Workforce Safety version 8.0.

Vaccination Status report

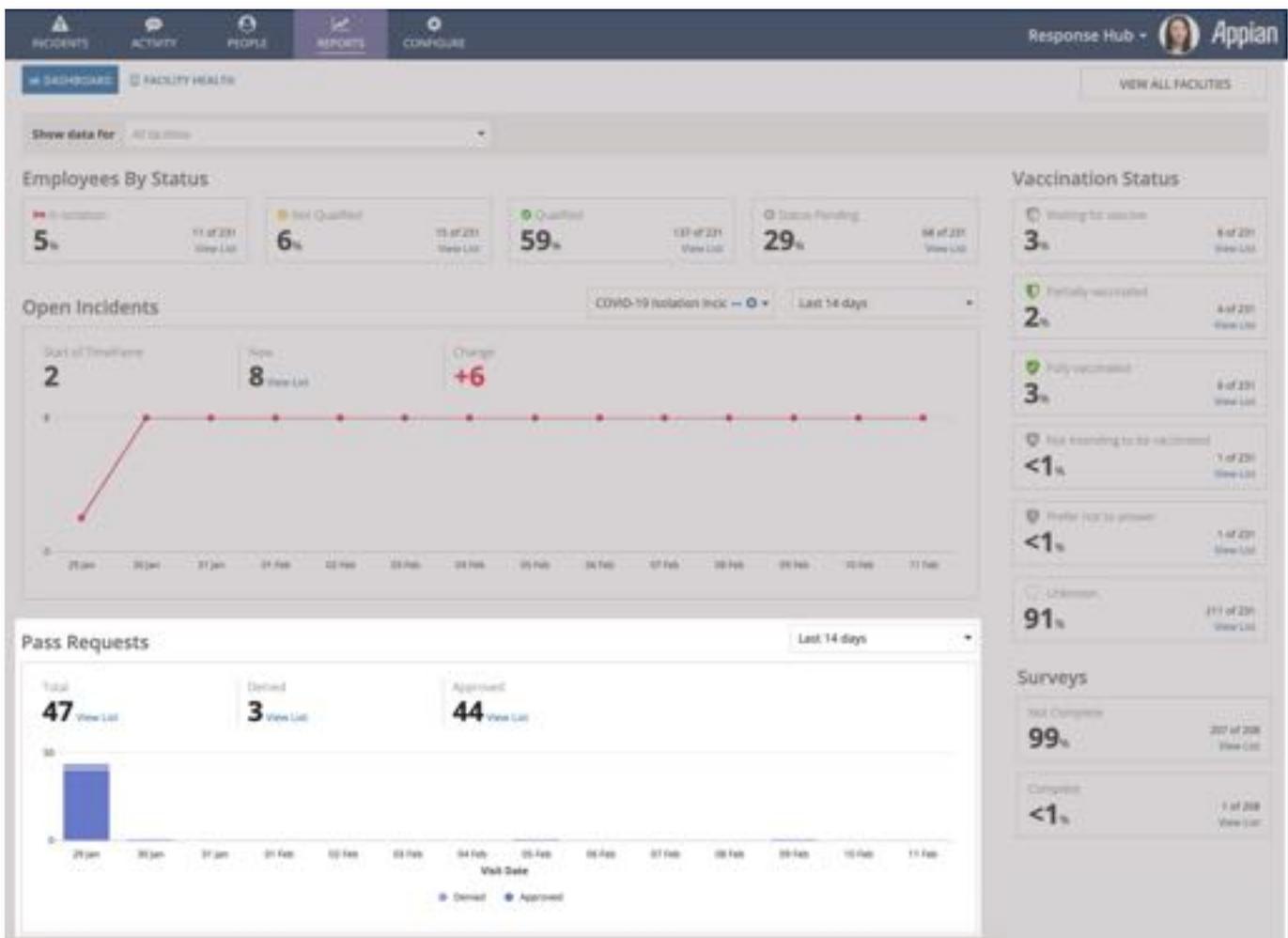
The **Vaccination Status** report only displays if you have **VACCINATION INSIGHTS** enabled and configured. This report allows you to see a breakdown of users by vaccination status. You'll use this report when you want to quickly assess the percentage of users: **Waiting for vaccine, Partially vaccinated, Fully vaccinated, Not intending to be vaccinated, Prefer not to answer, and Unknown.**



To view more details about the vaccination status of your users, simply click **View List** to see an exportable list of users behind each number. You can filter the data in this section using the **Show data for** filter at the top of the page, which allows you to view the data for a single facility or multiple facilities in your organization.

Pass Requests data

The **Pass Requests** section displays relevant data for all pass requests that have been submitted across your organization for a specific period of time. This data allows you to quickly see increases and decreases in the number of pass requests, which allows you to adjust your operational response based on need.



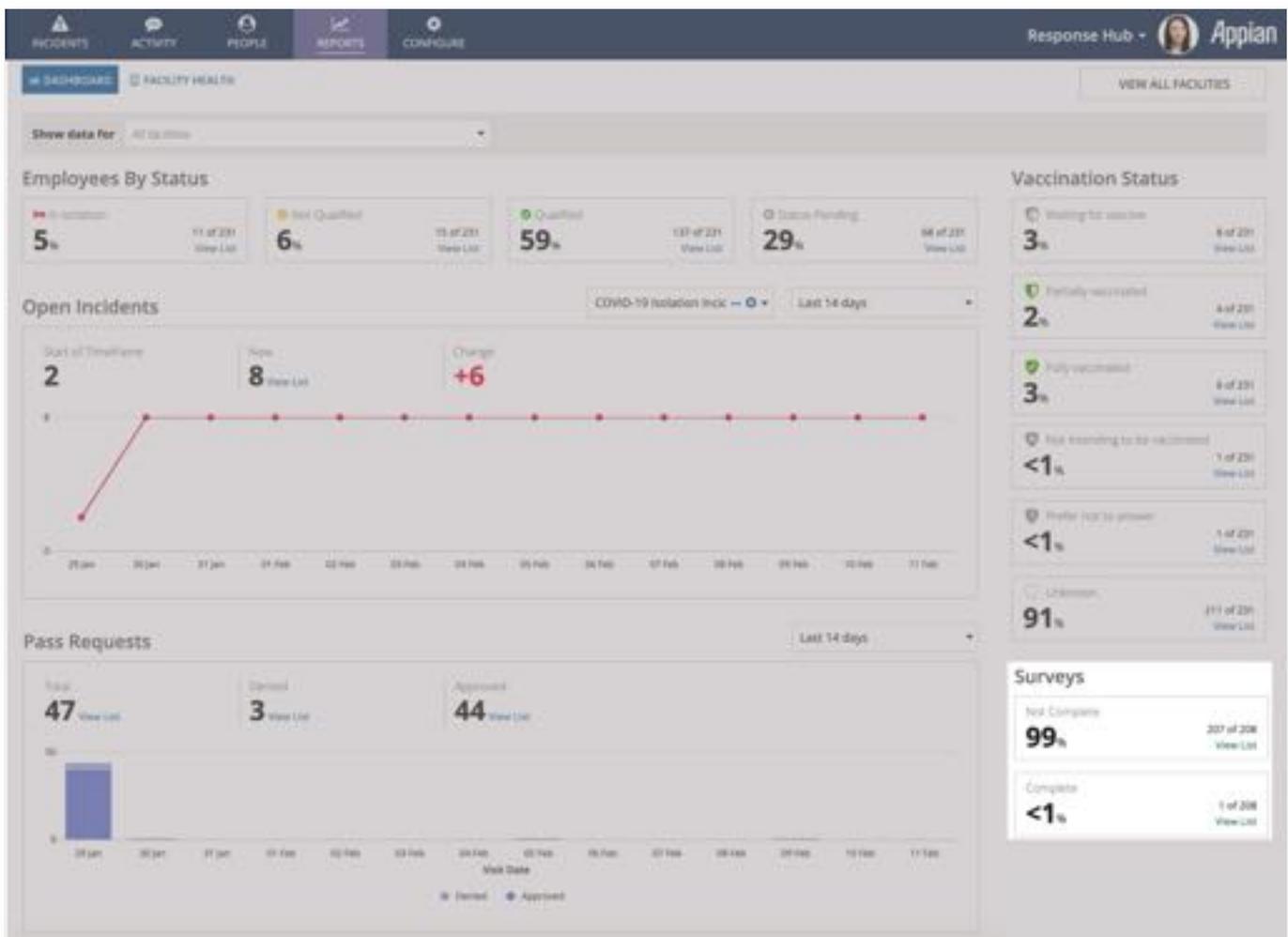
From this section, you can:

1. Analyze and understand your organization's pass request statistics, including the number of pass request approvals and denials, over a 7-day period.
2. View an exportable list of total pass requests for your organization.
3. Analyze pass request trends across your organization for a specific period of time.

The **Show data for** filter at the top of the page allows you to filter this data to see only the pass request data for the facilities you want to see. You can also use the **Date Range** picker to filter this report and display pass request data for a specific period of time.

Survey data

Take a look at the **Surveys** section when you want to identify the percentage of users in your organization that have completed the active survey. This report displays only when you have enabled and configured surveys for your organization.

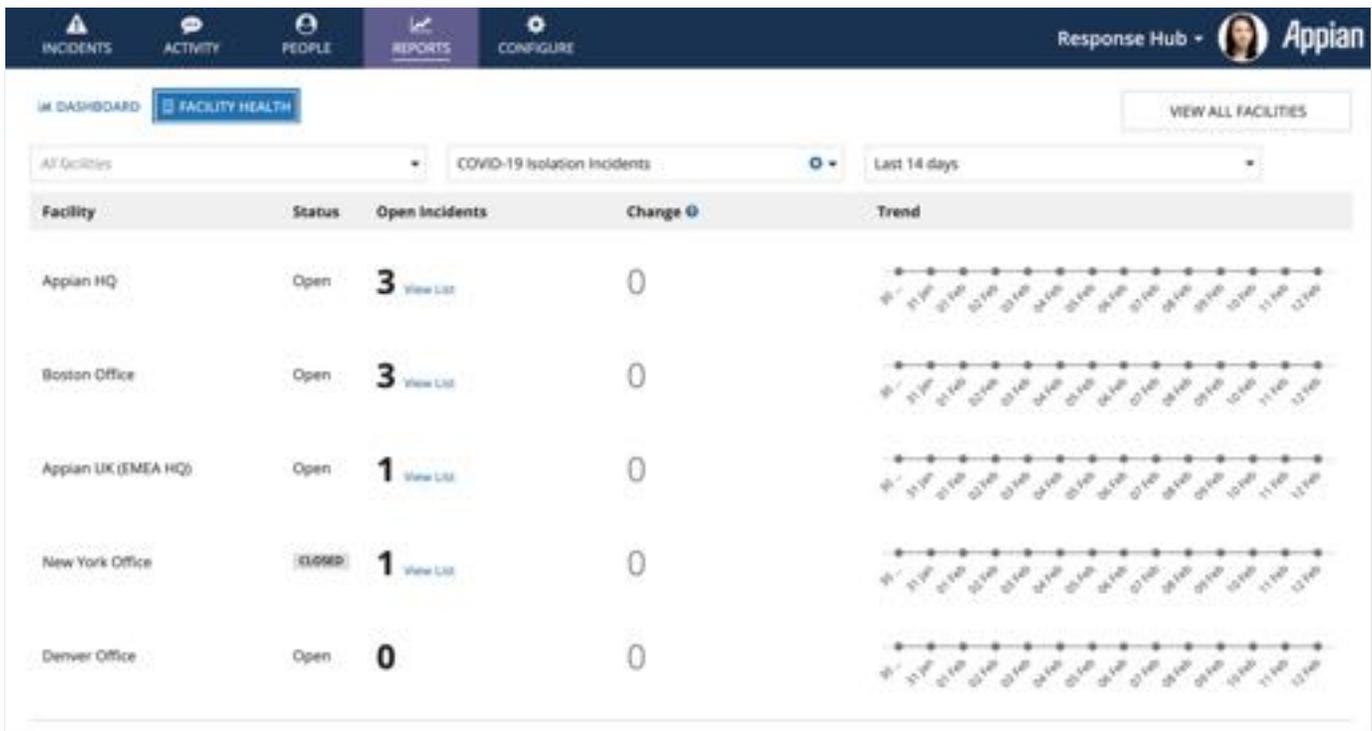


Use the **Show data for** filter at the top of the page to filter the data in this section by facility and click **View List** to access an exportable list of survey data.

This section is only visible if your organization has an *active* survey.

View your facilities health data

The **Reports** page has a **Facility Health** tab that allows you to monitor incident trends across facilities. This data helps you identify potential hotspots in your organization for COVID-19 isolation incidents as areas that may need your immediate attention.



This report ranks your facilities by the number of open incidents, and lists each facility with the following information:

- Status
- Open incident count
- Change in the number of open incidents from the start of the selected timeframe to today's date.
- Incident trend line chart

Use the **Facility** filter to analyze and compare incident trends across specific facilities in a region. Use the **Incident Type** filter to see the trends for a specific incident type. Use the **Date Range** filter picker to see trends for a specific period of time.

Additionally, you can click **View List** to view an exportable list of incidents behind the open incident count.

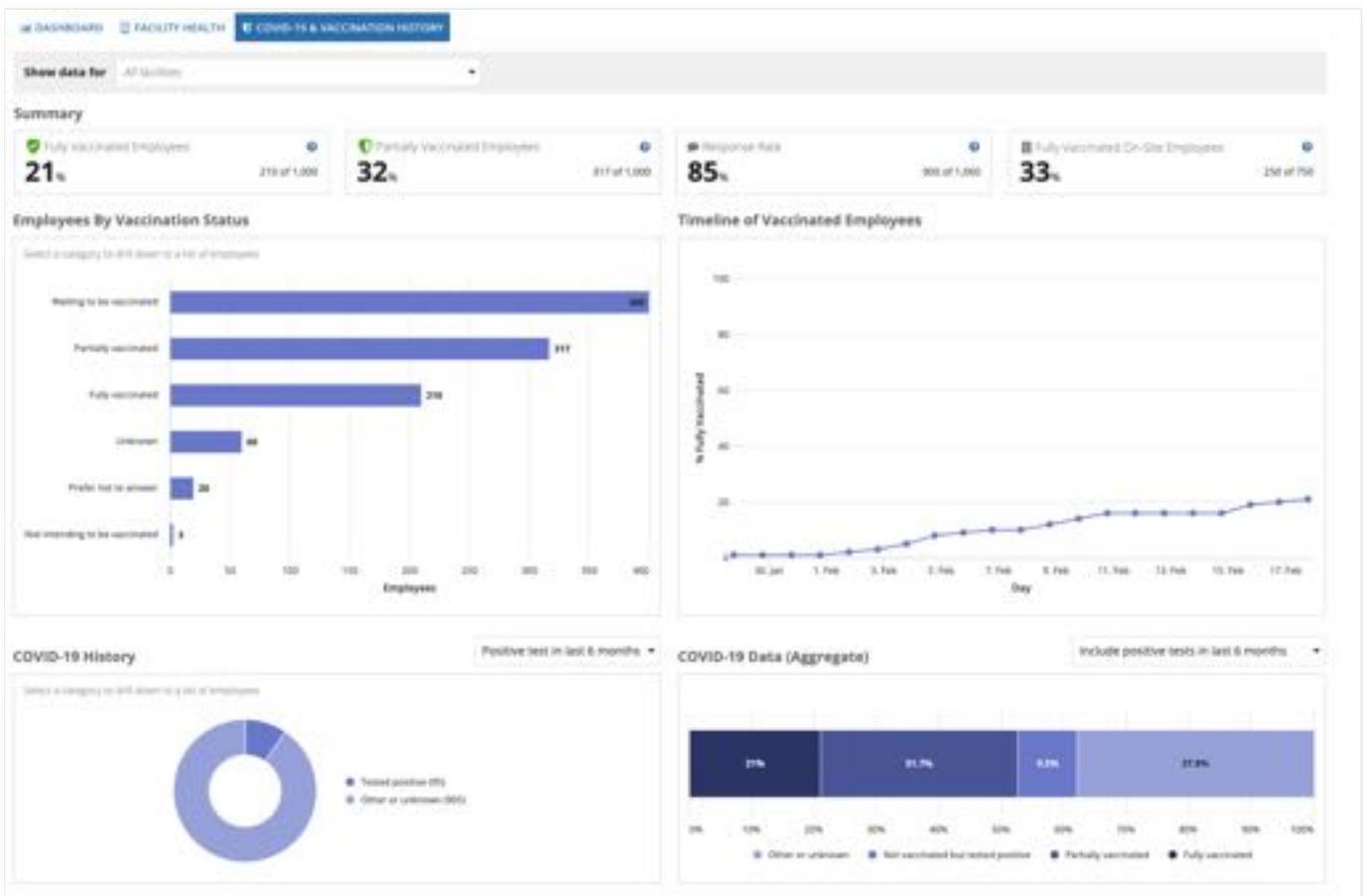
Manage your facilities

From the **Reports** page, you can also manage your facilities by adjusting the operating hours for a specific facility, updating visitor arrival instructions, and adding a location from your organization's facility list.

View your COVID-19 & vaccination health reports

The **COVID-19 & VACCINATION HISTORY** tab on the **Reports** page allows you to monitor the health of your organization as it relates to COVID-19 and vaccination data collected from your employees.

As your employees submit their COVID-19 history and their vaccination status, Workforce Safety compiles this data into various reports that display what percentage of your employees have been vaccinated and what percentage have a history of COVID-19 infection. The health data on this tab is displayed in the following reports: **Response Rate KPIs**, **Employees By Vaccination Status**, **Timeline of Vaccinated Employees**, **COVID-19 History**, and **COVID-19 Data (Aggregate)**.



Collectively this data provides you with a clearer understanding of your community's possible functional immunity levels as they relate to the COVID-19 infection. The reports, which are filterable by facility and timeframe, are only available when you enable the COVID-19 & Vaccination History feature([configure-features-wsr.md#](#)) in the Configure tab.

Summary data

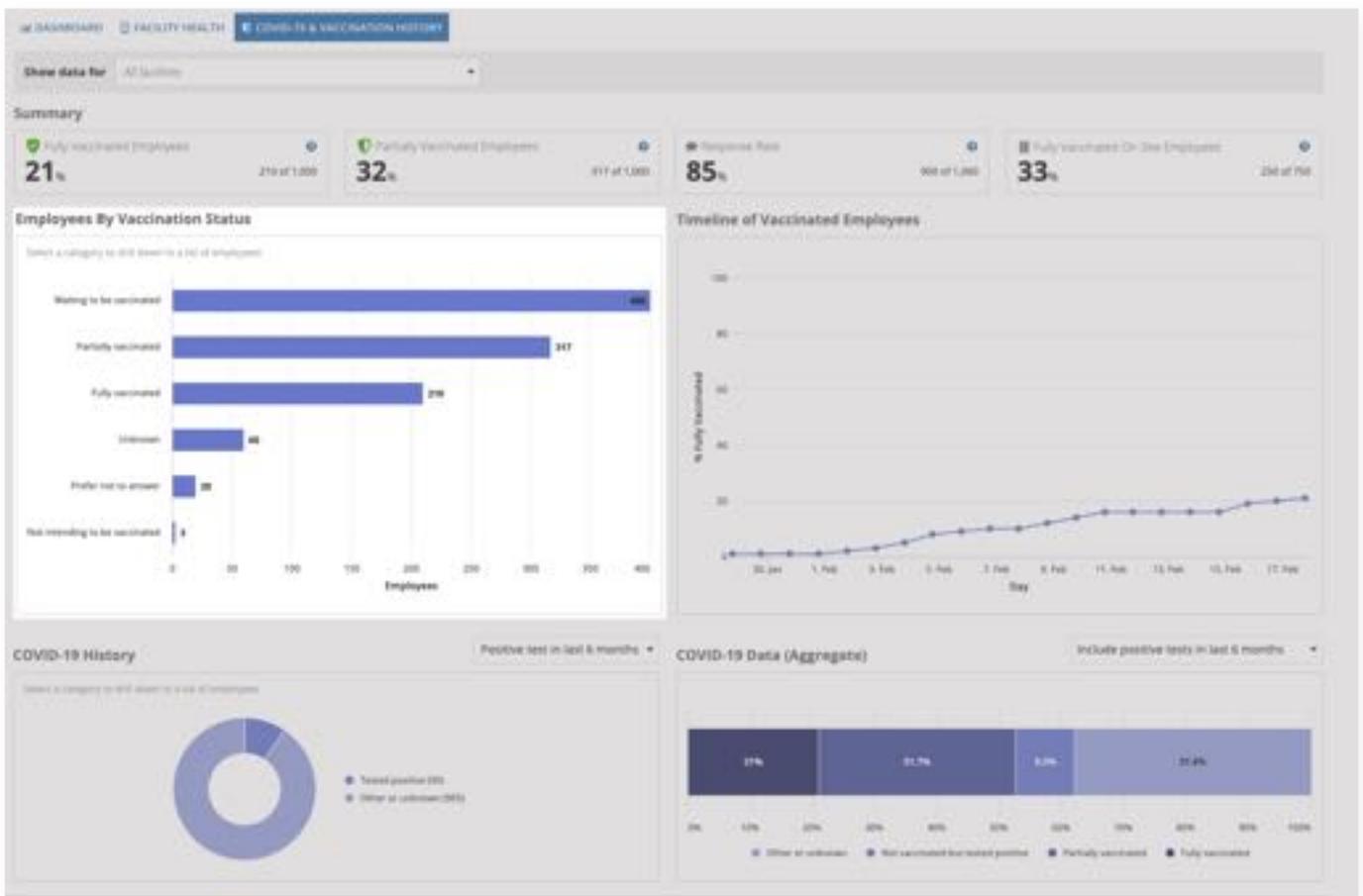
The health data displayed at the top of the page shows several KPIs that represent the percentage of employees who have reported their vaccination status in their profile form. Quickly see the percentage and the total number of employees who reported that they are *Fully Vaccinated*, *Partially Vaccinated*, and *Fully Vaccinated and On-site*. You can also see the **Response-Rate** KPI, which shows the percentage and number of employees from the selected facilities who have reported their vaccination status.



Fully Vaccinated On-Site Employees of the employees who have received a pass in the last seven days to one of the selected facilities in the facility filter, this is the percentage who have reported a fully vaccinated status.

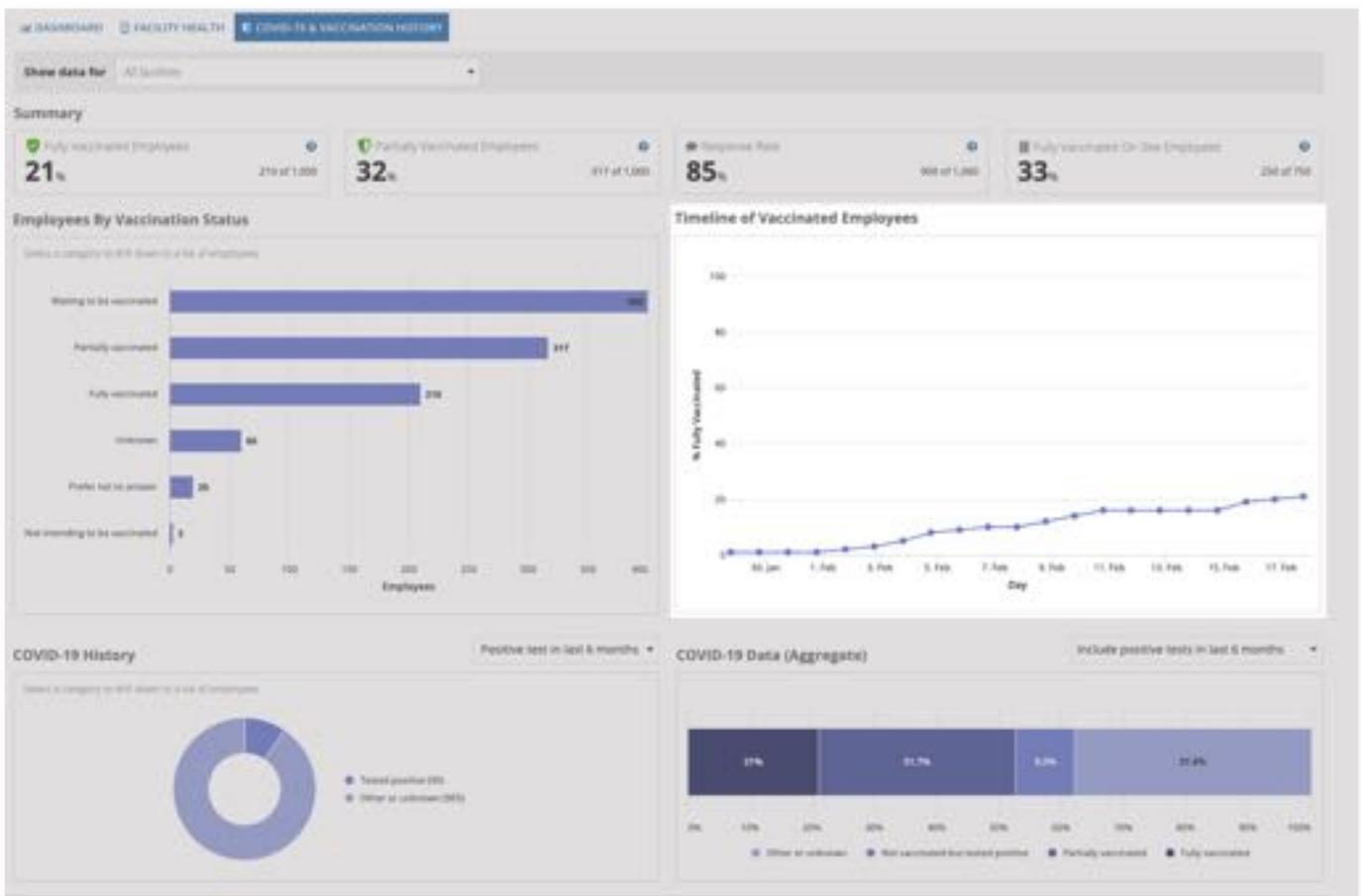
Employees by Vaccination Status report

This chart displays employees by vaccination status. You can view the data for all of your facilities or you can filter the data to show only selected facilities. Hover over a specific bar in the chart to see the number of employees with that status. When you click a specific bar in the chart, it shows an exportable list of employees with that status.



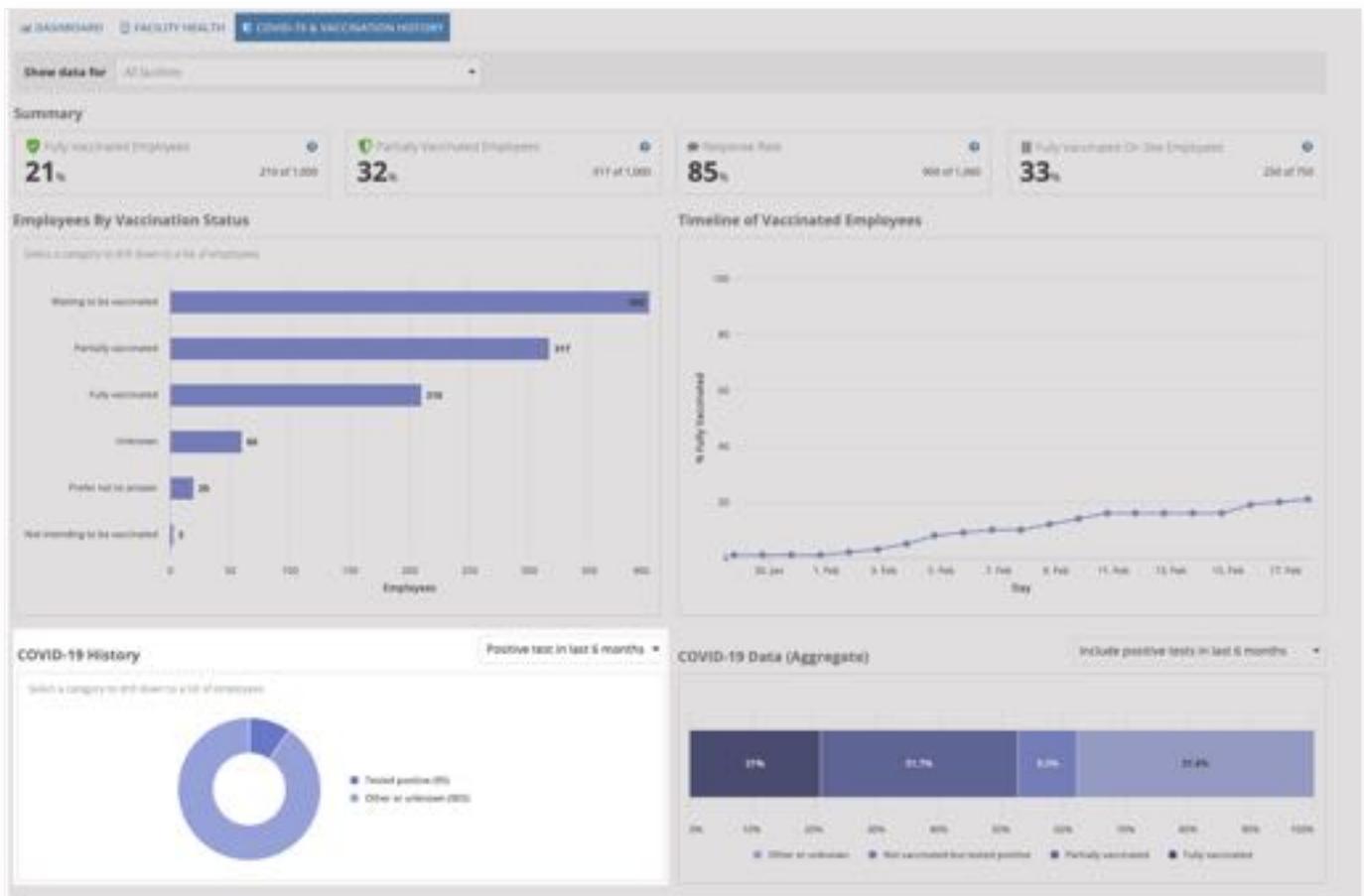
Timeline of Vaccinated Employees report

This line chart displays the total population growth of vaccinated employees for all of your facilities or for selected facilities over time. It is only shown if the Vaccination Dose Date question is active.



COVID-19 History report

This pie chart illustrates the percentage of employees who have reported a positive COVID-19 test result within the selected timeframe. A user can report these positive test results may be reported via their profile, a test request, or a COVID-19 isolation incident.



This chart is only available if the COVID-19 History question is active.

COVID-19 Data (Aggregate) report

This stacked chart combines the vaccination data and COVID-19 history data to illustrate your organization's broader COVID-19 health. With this chart you can see the percentage of employees who have been fully vaccinated, partially vaccinated, and employees who reported testing positive for COVID-19 in the selected time frame.

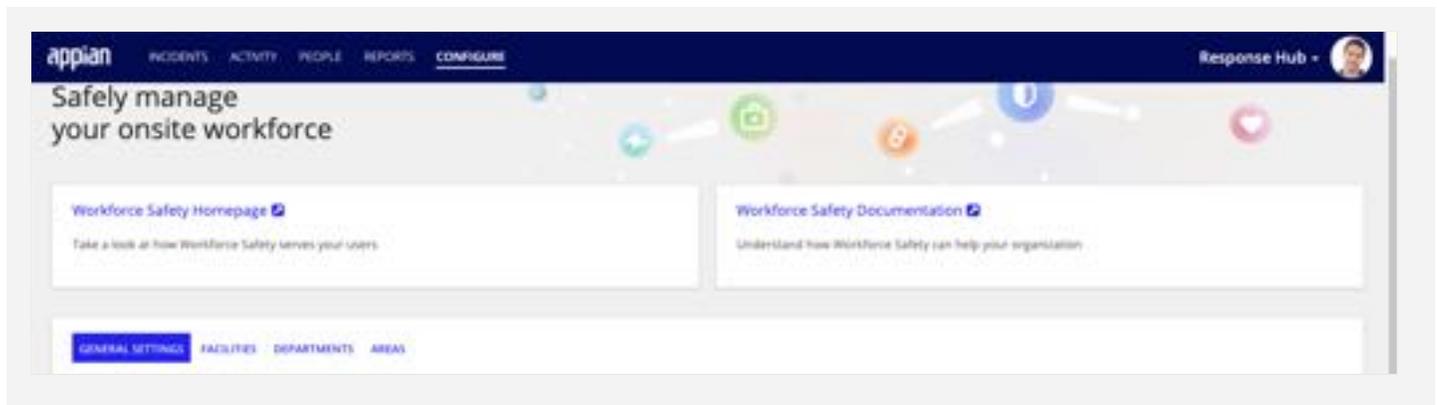


Like the other charts, this chart is only available if the COVID-19 History question is active.

Configure Workforce Safety

The **CONFIGURE** page provides the ability to customize various options including questionnaire questions, facilities, site features, and more. Users are also able to brand and tailor their site to better fit their organization.

To configure the Workforce Safety site, follow the instructions in the [configure site section](#).



Response Hub User Guide

Introduction

We created Workforce Safety to help large organizations with a unique problem—how can they keep their extensive number of employees safe during the COVID-19 pandemic?

Reacting quickly to possible exposures while maintaining employee anonymity is of paramount importance.

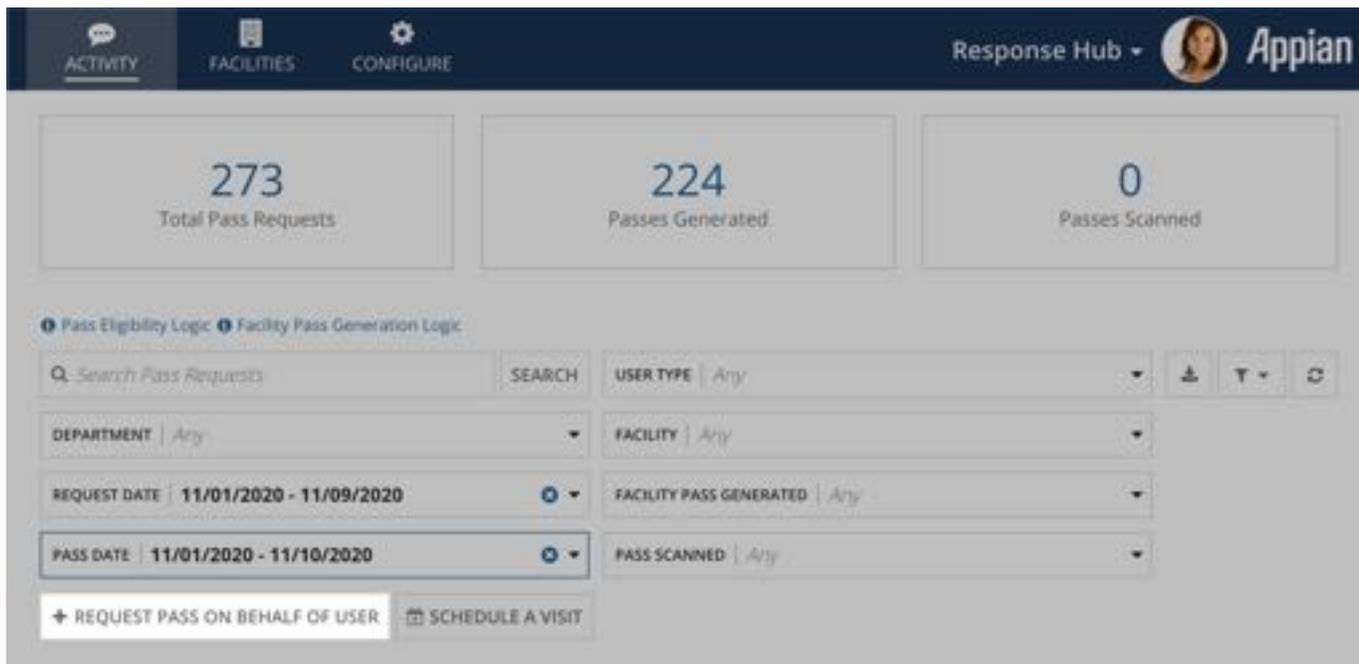
This page outlines how response managers, screeners, and coordinators use the Response Hub to manage crises.

See also

- For an overview of the Response Hub, see the [Response Hub Overview](#).
- For instructions on how Response Hub users can configure Workforce Safety, see the [Configuration Guide](#).
- For a list of what actions and information users have access to in the Response Hub, see the [Groups Reference Page](#).
- For instructions on how end users can use the Workforce Safety site, see the [Home Page User Guide](#).
- For information on how to manage visitors, see [Managing Visitors](#).

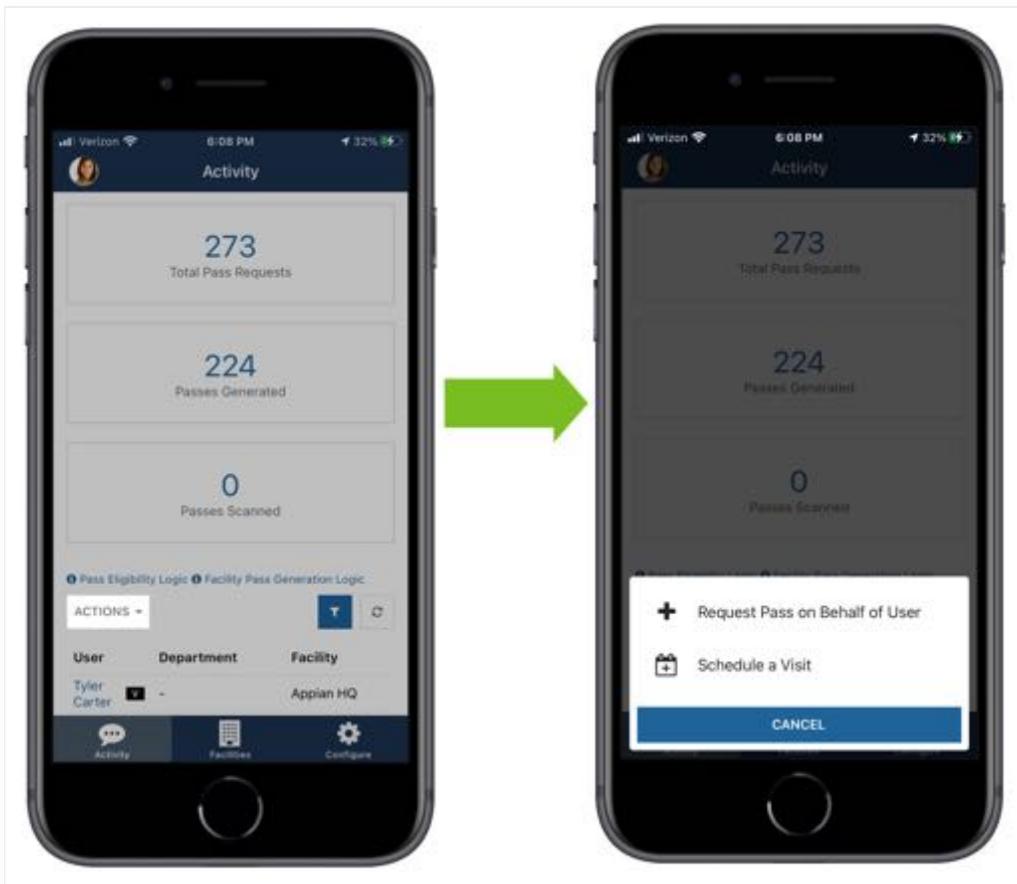
Requesting a pass on behalf of users

Screeners and response managers can [request a pass](#) for a user in the **Activity** tab in the Response Hub.



The screenshot displays the 'ACTIVITY' tab in the Appian Response Hub. The top navigation bar includes 'ACTIVITY', 'FACILITIES', and 'CONFIGURE', along with the 'Response Hub' label and the Appian logo. Three summary cards are visible: '273 Total Pass Requests', '224 Passes Generated', and '0 Passes Scanned'. Below these are two tabs: 'Pass Eligibility Logic' and 'Facility Pass Generation Logic'. A search bar is present with the text 'Search Pass Requests' and a 'SEARCH' button. To the right of the search bar are controls for 'USER TYPE' (set to 'Any'), a download icon, a refresh icon, and a filter icon. Below the search bar are several filter dropdowns: 'DEPARTMENT' (Any), 'FACILITY' (Any), 'REQUEST DATE' (11/01/2020 - 11/09/2020), 'FACILITY PASS GENERATED' (Any), 'PASS DATE' (11/01/2020 - 11/10/2020), and 'PASS SCANNED' (Any). At the bottom, there are two buttons: '+ REQUEST PASS ON BEHALF OF USER' and 'SCHEDULE A VISIT'.

To request a pass on mobile, click **ACTIONS**, then **Request a Pass on Behalf of User**.

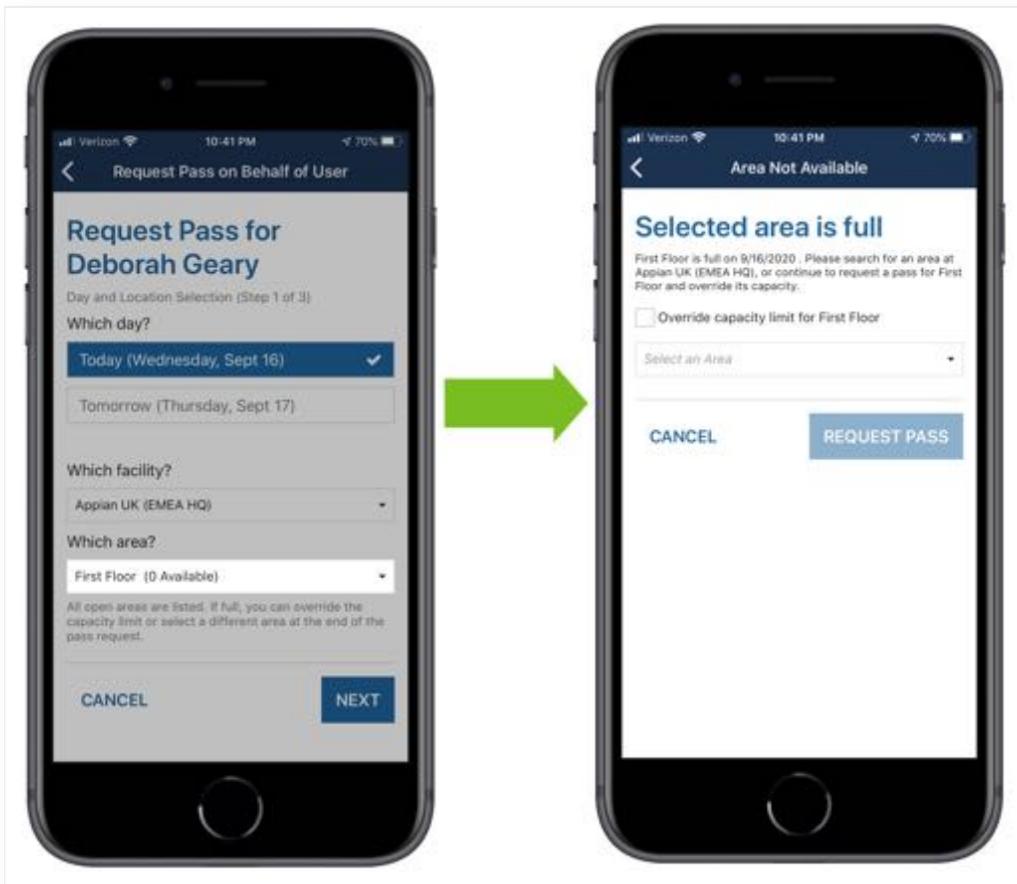


Screeners can also request passes for visitors, but the visitor must have a [visit scheduled](#) first. See [On-site registration process](#) for more details on this process.

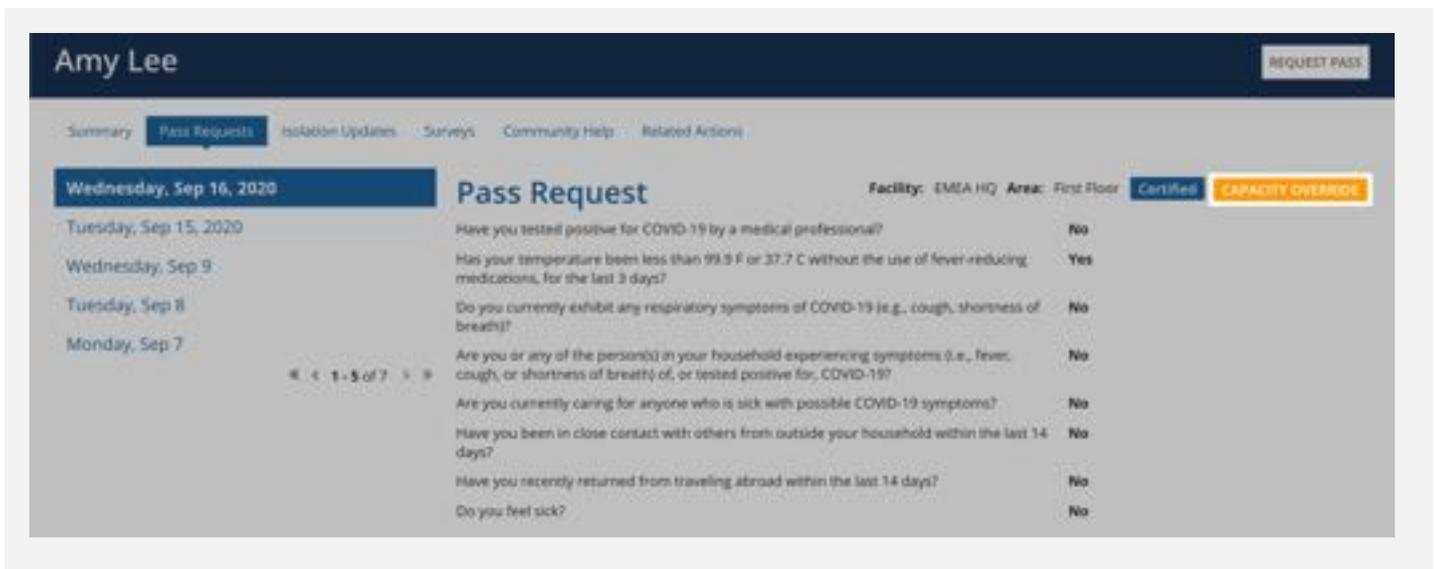
Note that capacity restrictions and cohorts do not apply to visitors.

If [Enforce Area Capacity Restrictions](#) is toggled on, an area selection will display on the pass request.

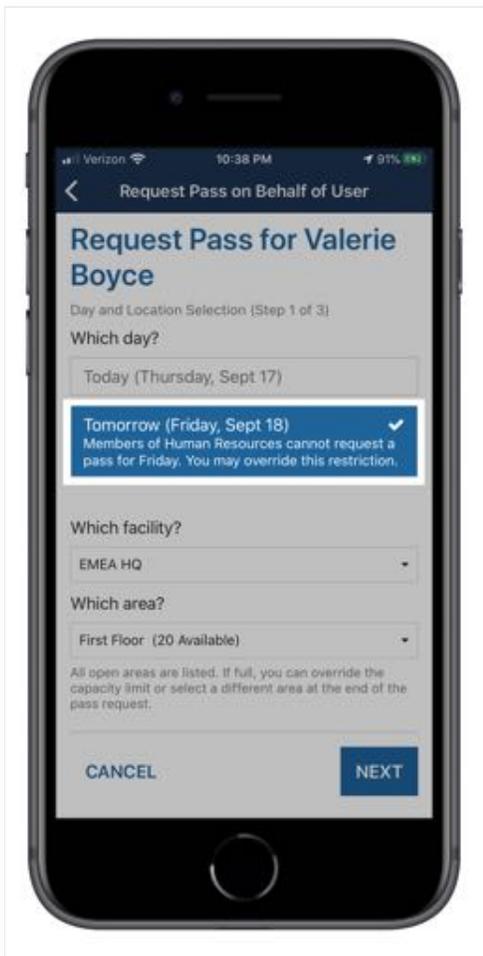
Response managers and screeners will see the remaining capacity for each area. If an area is full, they can still select the area. At the end of the pass request, they will be asked to override the capacity restriction, or select another area.



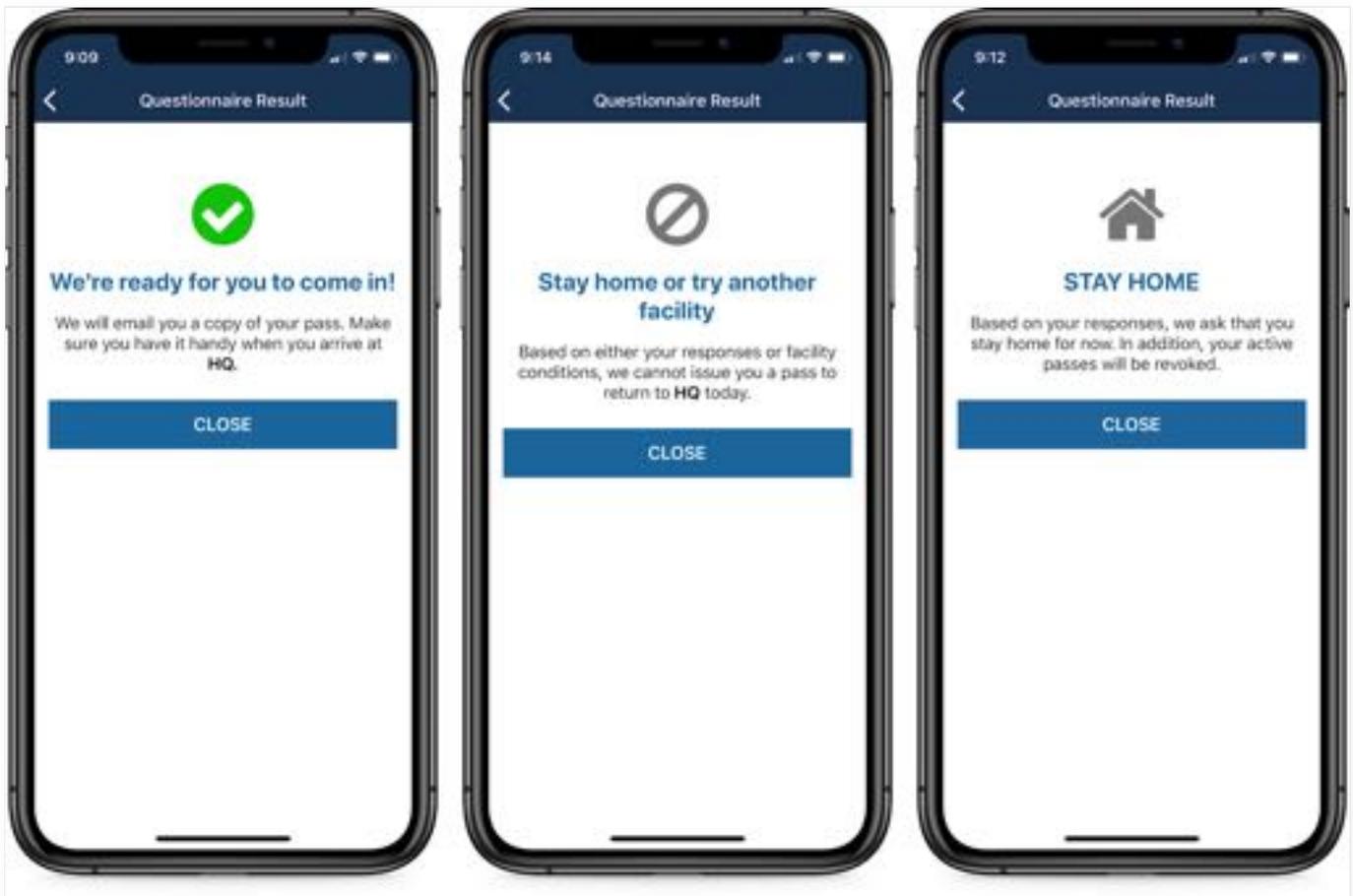
If capacity restriction is overridden, it will display on the user's Pass Request tab for that pass request.



If [Cohort Management](#) is toggled on, a message will display for any days that aren't associated with the user's cohort. Screeners and response managers can still select the day and override this restriction.



After they submit the request, the result of the request displays. See [Pass eligibility](#) for more information on how pass eligibility is determined.

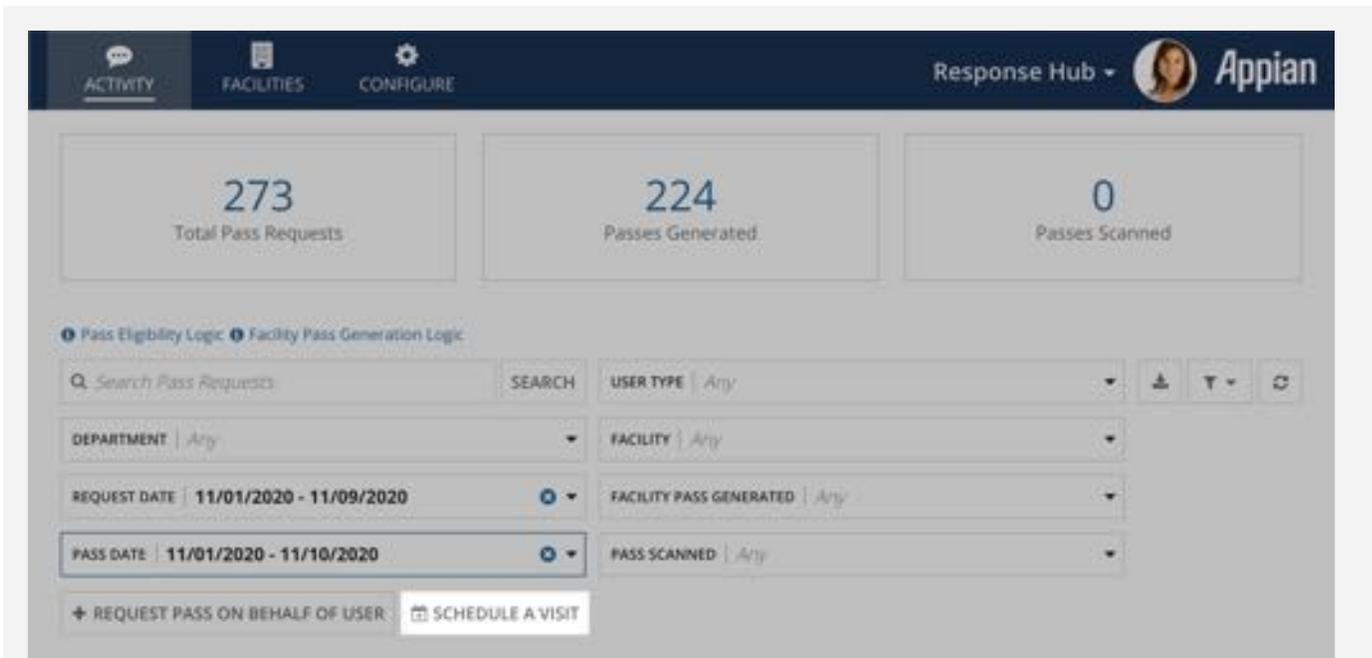


Scheduling a visit for visitors

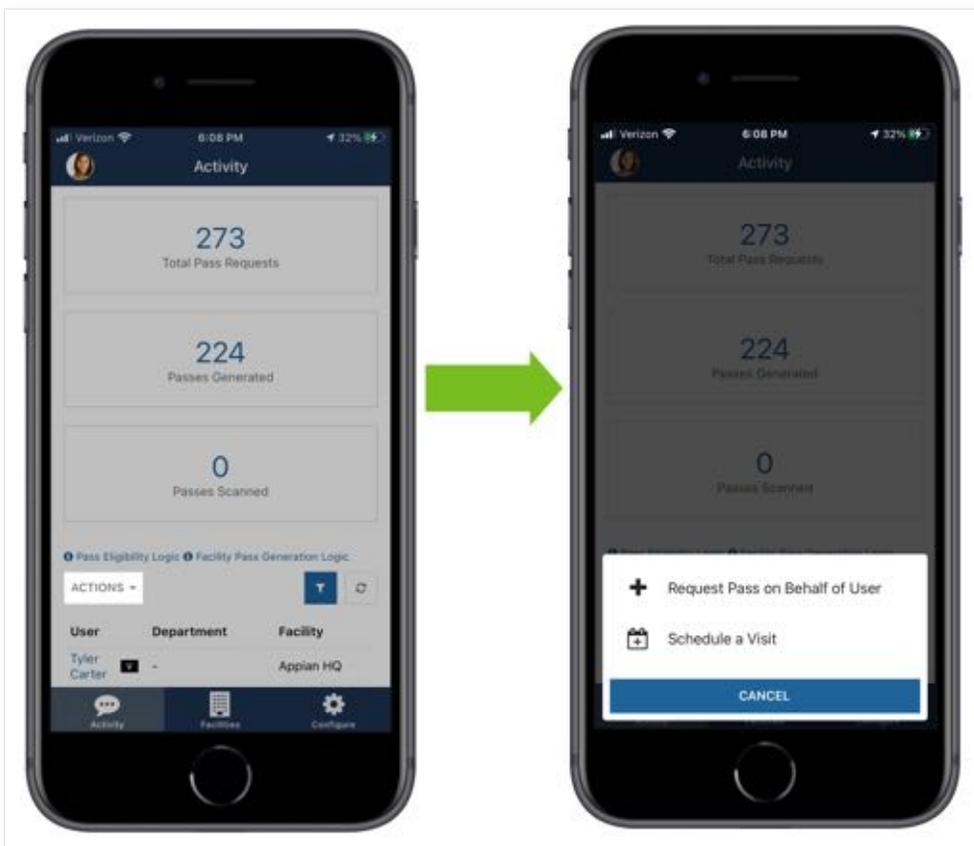
Screeners and response managers can schedule a visit for visitors in the Response Hub. Visitors must have a visit scheduled before a screener can request a pass for them. See [Managing Visitors](#) for more information on visitors.

To schedule a visit from the Response Hub:

1. (Desktop) Click **SCHEDULE A VISIT**.



2. (Mobile) Click **ACTIONS** > **Schedule a Visit**.



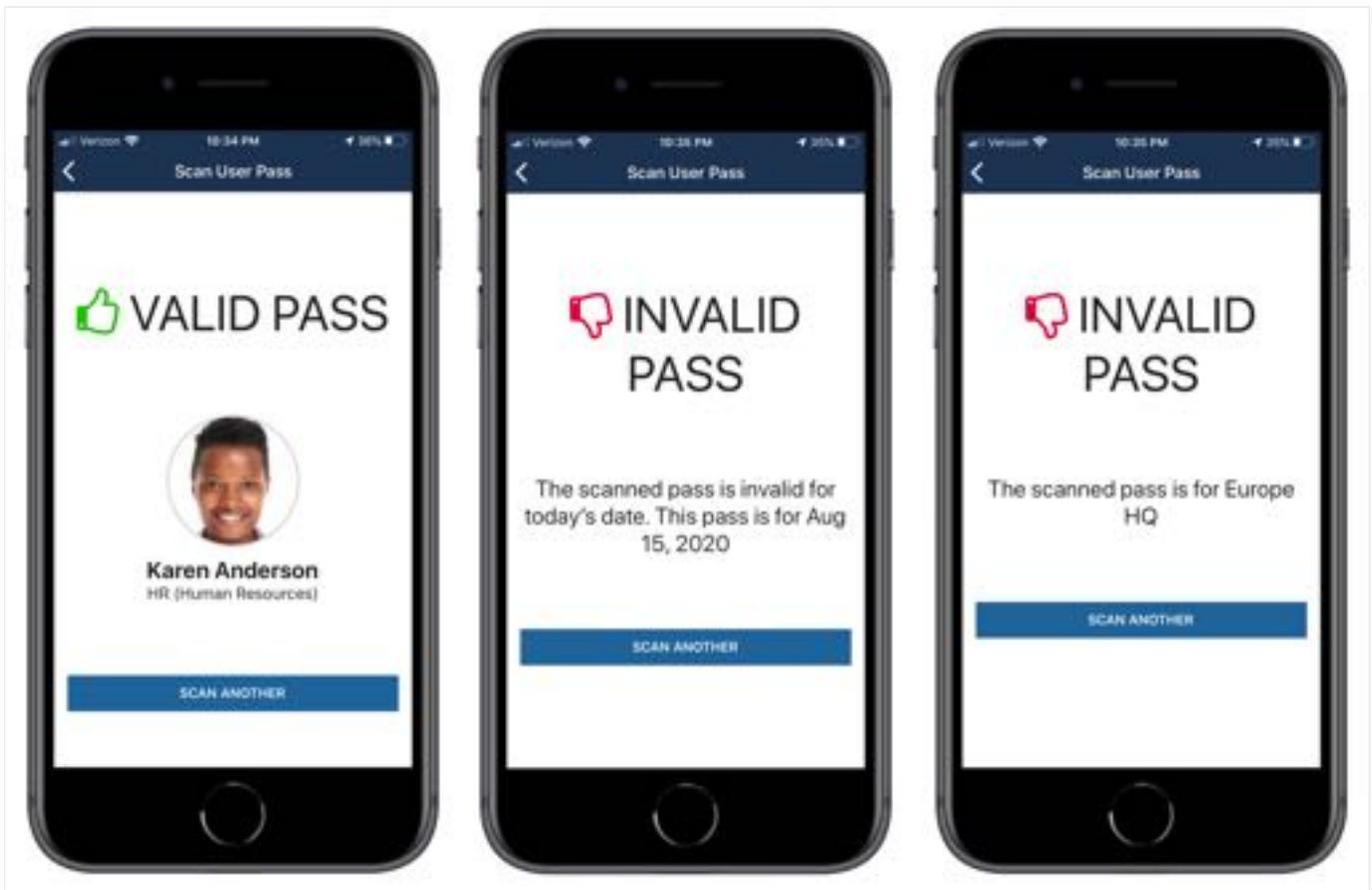
3. Select a facility and click **NEXT**.
 - **Tip:** You can select closed facilities since some visitors, such as cleaning and maintenance crews, may still need access to facilities that are closed.
4. Select the day or day range that the visitor should be able to visit and click **NEXT**.
5. Select the visitor.
 - If the visitor is already in the system, find and select them in the **Select Visitor** field.
 - **Tip:** If a message displays that says the visitor is not eligible to visit, it is likely because they are in isolation or have an open incident.
 - If the visitor is new, click **+ NEW VISITOR**, then enter a first and last name and an email address and click **ADD**.
 - **Note:** The email address will be the visitor's username.
6. Click **Finish**.

After the visit is scheduled, the visitor can [request a pass](#). If they are requesting a pass themselves, they will need to reset their temporary password using the instructions in the account creation email that is sent to them. Screeners and response managers can also [request a pass on behalf of the visitor](#).

Scanning passes

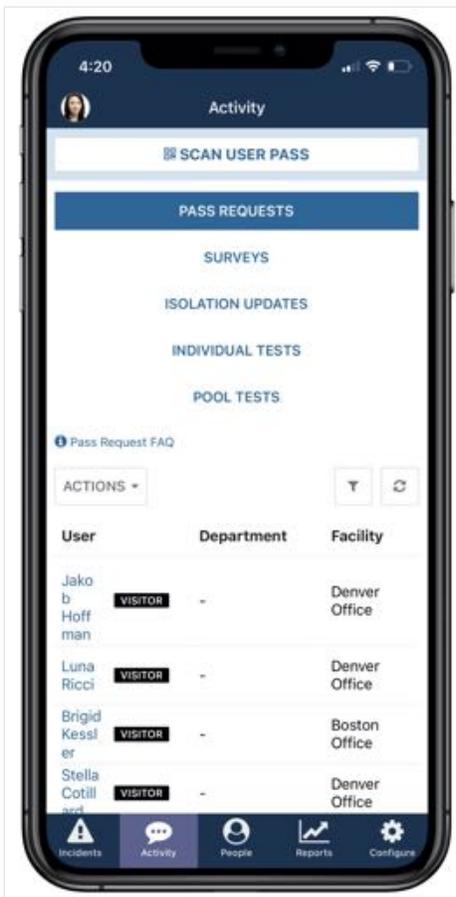
Screeners and response managers can scan mobile passes using the Appian mobile application.

If the user is eligible to return for that calendar day for the selected location, **VALID PASS** displays. Otherwise, **INVALID PASS** displays. If the pass is invalid either because it is for a different day or location, the reason displays.

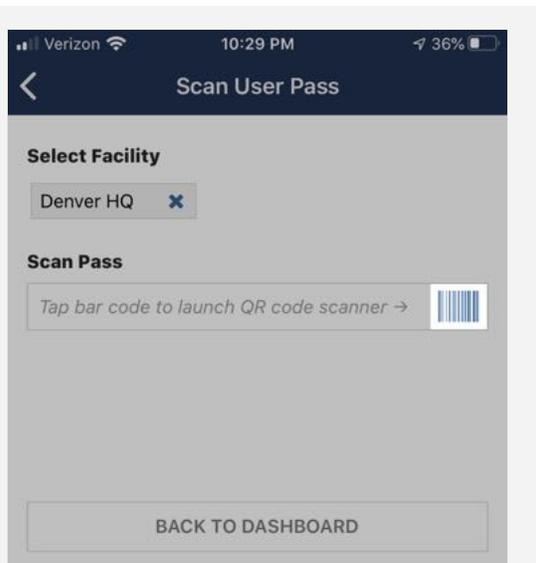


To scan a pass:

1. Log in to the [mobile Appian application](#).
 - o **Note:** The Scan User Pass option will not display if Workforce Safety is opened in a mobile browser. It only displays from the Appian mobile application.
2. Go to the **Activity** tab and click **SCAN USER PASS**.



3. For **Select Facility**, use the picker to find the facility that you are scanning passes for.
4. Tap the bar code icon to launch the QR code scanner.
 - o **Note:** You may need to grant access to the mobile device's camera.



5. Scan the pass using the mobile device's camera. Either **VALID PASS** or **INVALID PASS** displays.
6. Click **SCAN ANOTHER** to go back to the Scan User Pass screen. The facility defaults to the last facility selected.

When a valid pass is scanned, the timestamp is saved to record that the user visited the facility that day.

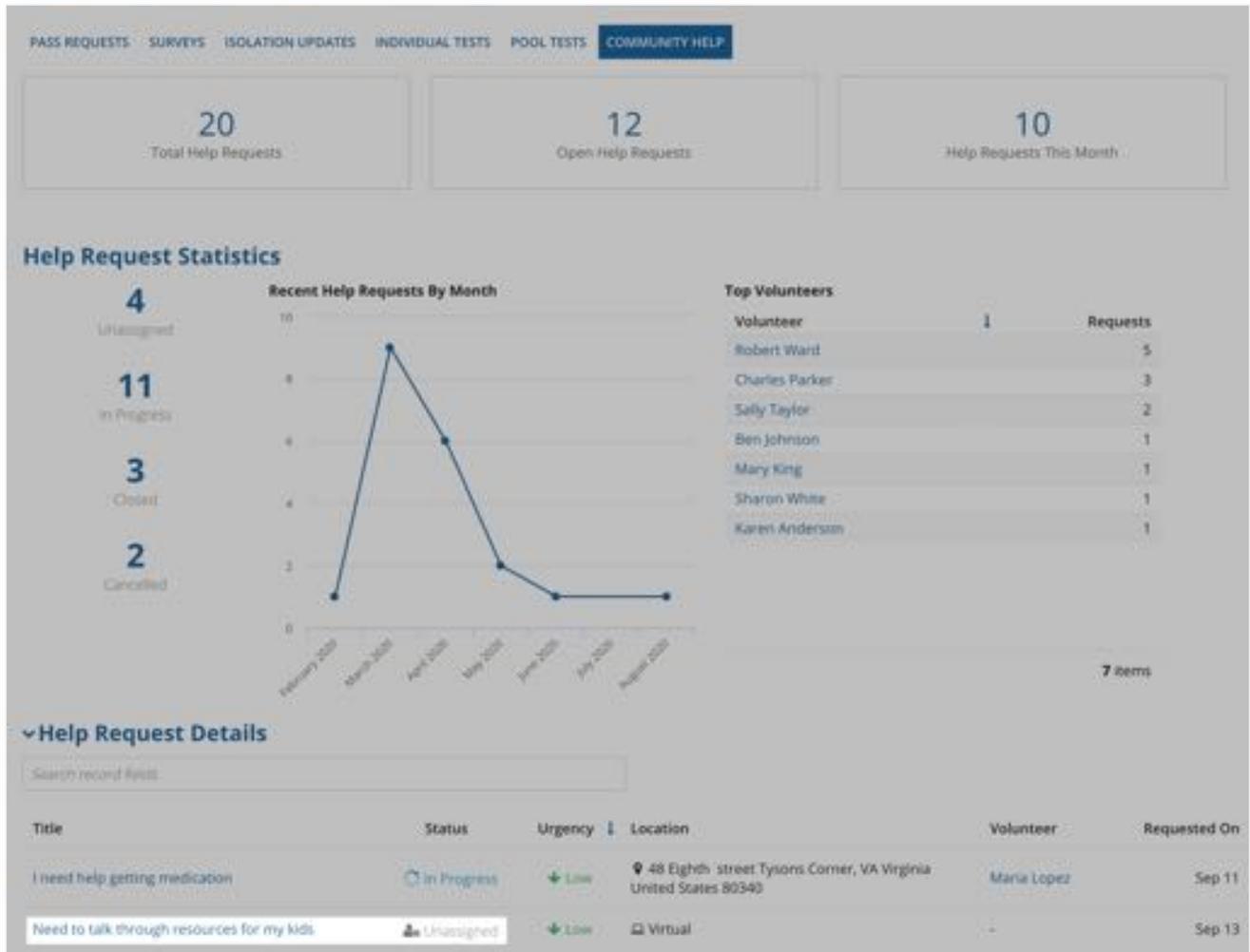
Valid passes can be scanned multiple times and will be valid until they have expired or been revoked due to a disqualifying response on a questionnaire.

Matching help requests with volunteers

If the [Community Volunteering and Help Requests](#) feature option is toggled on, response managers and coordinators can match help requests with volunteers.

To match a help request with a volunteer:

1. For response managers, from the **ACTIVITY** page go to the **Community Help** tab. The Community Help report on the **ACTIVITY** page displays automatically for coordinators when they sign in.
2. In the Help Request Details list, click an **Unassigned** help request.



3. Click **MATCH WITH VOLUNTEER**.
4. Select a volunteer from the list and click **ASSIGN CASE**.

Need to talk through resources for my kids

Request Details

Angela Lewis
 angela.lewis@app.com
 789-956-4564

Need to talk through resources for my kids

Low

Virtual

Touch base or sounding board

I'm struggling with balancing work and distance learning. Are there any other parents who would be willing to share their strategies?

Assign Volunteer

Search Location...

Touch base or sounding board

Virtual

Volunteer	Address	Help Categories	Help Offered	Number of Requests
Brian Chen	48 Eighth street Tysons Corner, VA Virginia United States 80340	<ul style="list-style-type: none"> Help before or during a meeting Running errands Touch base or sounding board ... More	In-Person, Virtual	0
Maria Lopez	123 Main St, Annapolis, MD	<ul style="list-style-type: none"> Help before or during a meeting Running errands Touch base or sounding board ... More	In-Person, Virtual	1

Volunteer Details

Maria Lopez
 maria.lopez@fake.appian.com

123 Main St, Annapolis, MD

Open help requests: 1

Closed Help Requests: 0

Additional Details: I am free mon/wed/fri in the mornings

CANCEL ASSIGN CASE

The filters are automatically set to only show volunteers that said they are willing to help with that type of request based on the category of request and whether it is in-person or virtual.

You can also match an assigned help request to a different volunteer by opening the help request and clicking **REASSIGN**.

When the help request is complete, the response manager, coordinator, volunteer, or requestor can **CLOSE** the help request.

I need help getting medication

REASSIGN DECLINE ASSIGNMENT CLOSE

Summary Related Actions

Unassigned In Progress Closed

Requests may contain Personal Health Information. Please follow your organization's policies for handling Personal Health Information under HIPAA when reviewing requests.

Requestor Details

Brian Chen
 brian.chen@app.com

I need help getting medication

Volunteer Details

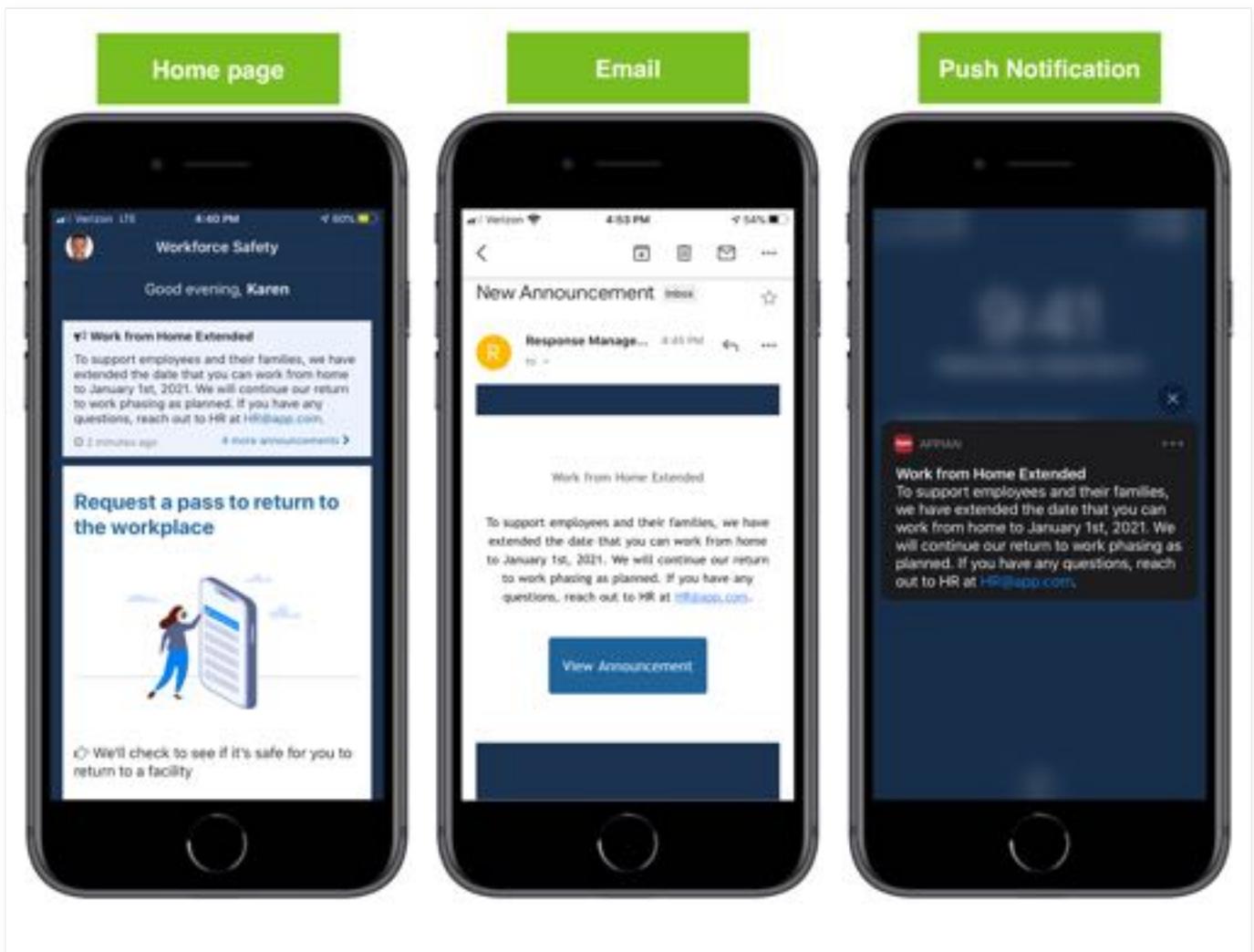
Maria Lopez
 maria.lopez@app.com

2 Comments

System Admin
 Friday 2:54 am

Managing announcements

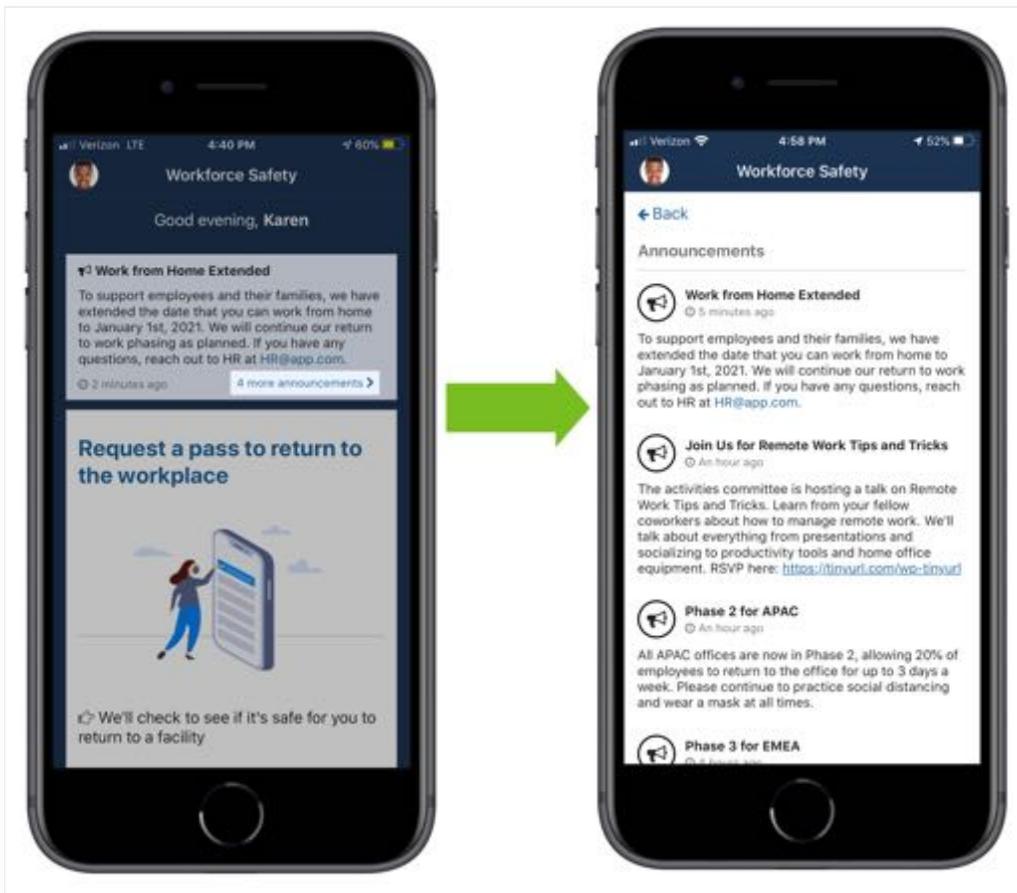
To keep your users up to date with the latest news, response and configuration managers can [post announcements](#) on their Workforce Safety homepage. You can also choose to send an email or push notification to mobile devices when you post the announcement.



In order to receive push notifications, users must have [downloaded and logged in to the Appian application on their mobile device](#). They also must have notifications turned on for the Appian application in their device settings.

Up to five announcements can display at a time. If you have reached the limit, you must [archive an announcement](#) to post a new one.

The newest announcement will display on every user's homepage until it is archived or a new announcement is posted. Users can click the link to view all posted announcements, which display in the order that they were created.



Posting announcements

To display an announcement on the Workforce Safety homepage for all users, post it. Optionally, you can send an email or push notification when you post the announcement.

To post an announcement:

1. From the **CONFIGURE** page, click **ANNOUNCEMENTS**.
2. If you see a **Maximum Number of Announcements Reached** message, [archive an announcement](#).
3. Enter a **Title** that is less than 100 characters.
4. Enter a **Message** that is less than 500 characters.
5. Select if you would like to send an email or push notification when you post the announcement.
6. Click **POST ANNOUNCEMENT**.

Configure Announcements

You may configure up to 5 announcements to display to users. The most recent announcement will be at the top of a user's landing page with an option to view all current announcements.

New Announcement

Title *

Message *

Send Email Notification? * Yes No

Send Push Notification? * Yes No

Announcements

CURRENT ARCHIVED

Title	Message	Email Notification	Push Notification	Created On	
Work from Home Extended	To support employees and their families, we have extended the date that you can work from home to March 1st, 2021. We will continue our return to work phasing as planned. If you have any questions, reach out to HR at HR@app.com.	✓	✓	Sep 08, 2020 4:27 PM	<input type="button" value="ARCHIVE"/>

Archiving announcements

To remove an announcement from the Workforce Safety homepage of all users, archive it.

To archive an announcement:

1. From the **CONFIGURE** page, click **ANNOUNCEMENTS**.
2. Next to the announcement you would like to archive, click **ARCHIVE**.

You can view archived announcements by clicking the **ARCHIVED** tab.

Announcements

CURRENT **ARCHIVED**

Title	Message	Email Notification	Push Notification	Created On	
Work from Home Extended	To support employees and their families, we have extended the date that you can work from home to March 1st, 2021. We will continue our return to work phasing as planned. If you have any questions, reach out to HR at HR@app.com.	✓	✓	Sep 08, 2020 4:27 PM	<input type="button" value="ARCHIVE"/>
Phase 2 for North America	All North American offices are now in Phase 2, allowing 20% of employees to return to the office for up to 3 days a week. Please continue to practice social distancing and wear a mask at all times.	✓	✓	Sep 08, 2020 10:31 PM	<input type="button" value="ARCHIVE"/>

The capabilities in the following sections are only available to response managers.

COVID-19 isolation incidents

COVID-19 isolation incidents are essential to managing your COVID-19 response. Response managers must be made aware of all employees who tested positive for COVID-19 or were exposed to someone who tested positive for COVID-19. They must also be aware of employees that show symptoms of COVID-19 in order to protect the workplace community.

Workforce Safety helps response managers with the enormous task of keeping their communities safe by:

- Automating the placement of employees in and out of isolation.

- Providing an easy way to notify, isolate, and request tests from exposed employees.
- Providing an easy way to update affected facilities and areas.

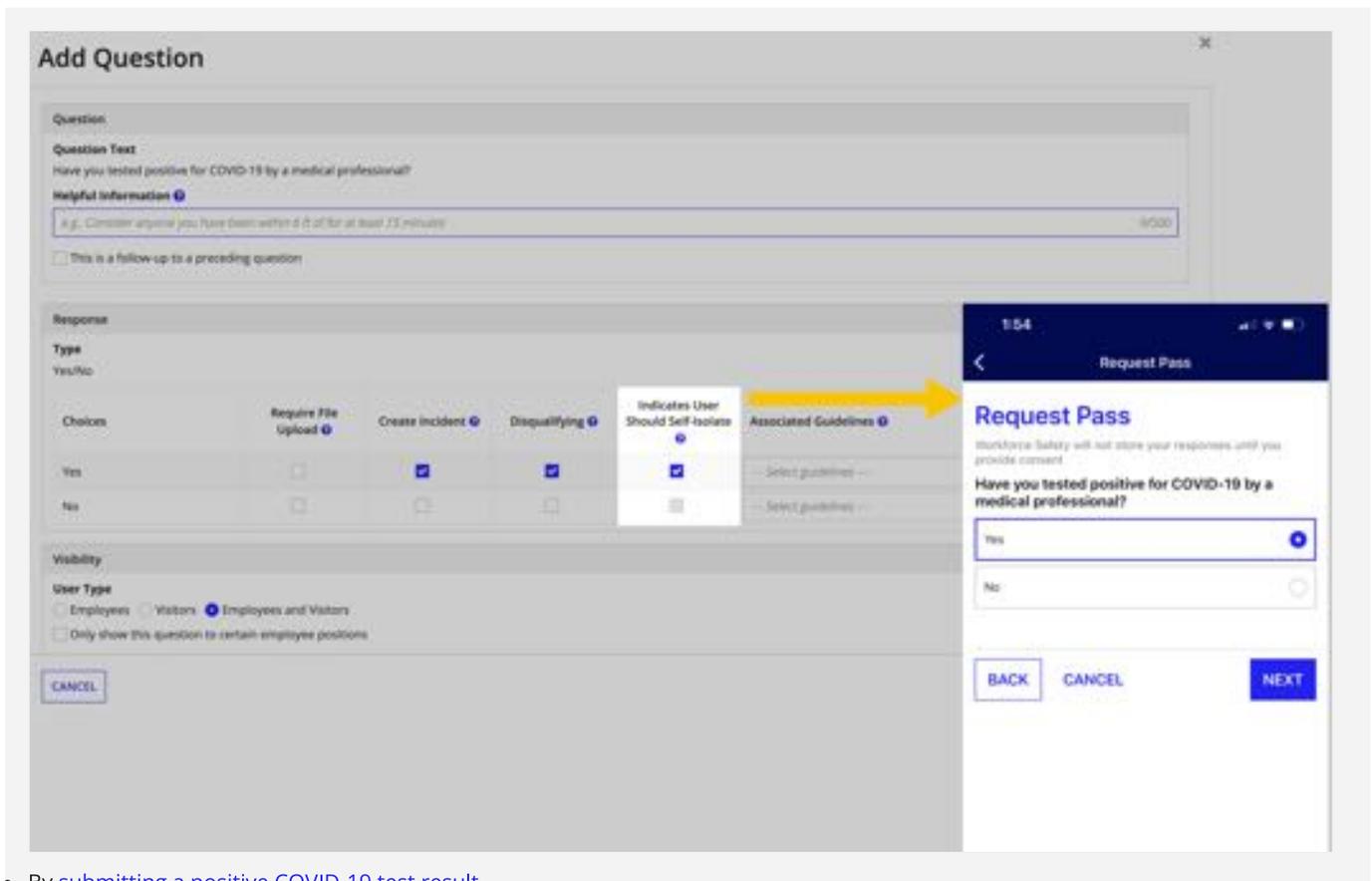
How COVID-19 isolation incidents are created

Users and response managers can manually [create COVID-19 isolation incidents](#) by selecting **COVID-19 RELATED INCIDENT** when they create an incident.



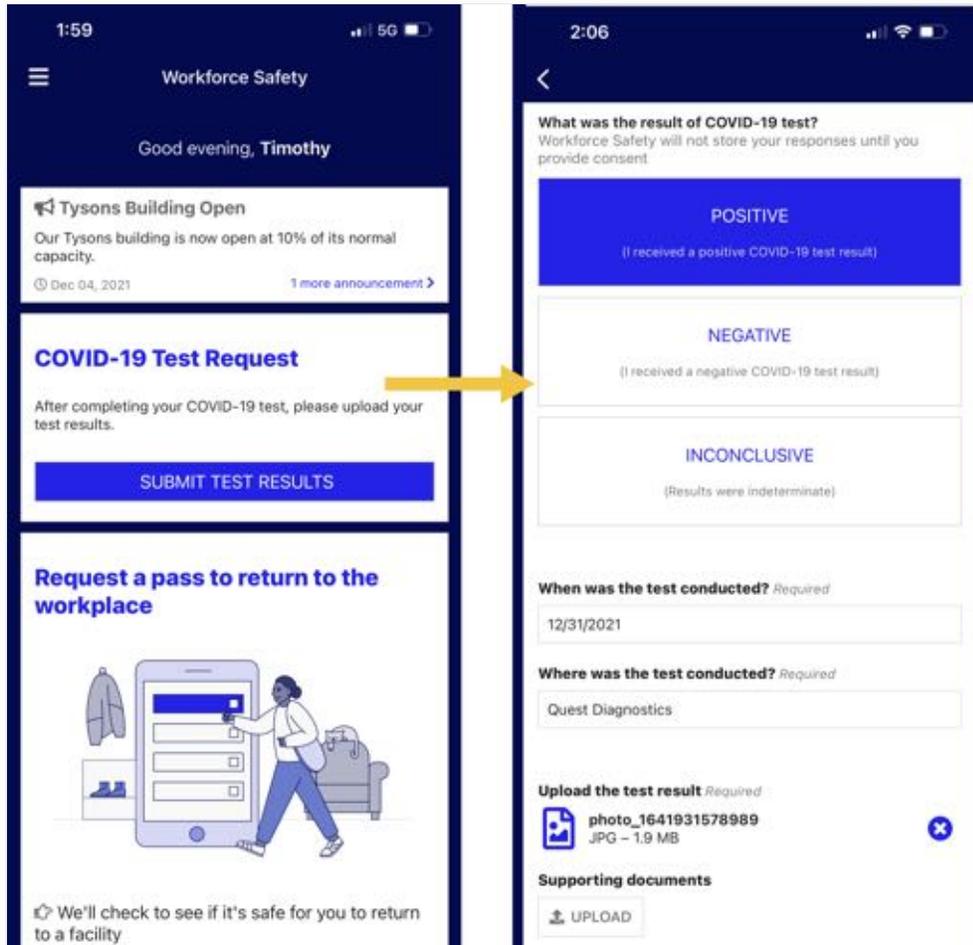
A COVID-19 related incident can also be created automatically in the following situations:

- Through a pass request or isolation update—if the user chooses a response that is [configured to create a COVID-19 isolation incident](#).



- By [submitting a positive COVID-19 test result](#).

- o **Note:** If **Require Response Manager Verification of Test Result Evidence?** was selected when the [test request was sent](#), the user won't be placed into isolation until after the test result is verified by a response manager.



How COVID-19 isolation incidents affect users

Contact tracing

When a COVID-19 isolation incident is created by a user or response manager, all of the people that the user reported having contact with during the past 14 days is displayed in the Contact Tracing tab of the incident. Since visitors do not log contacts, visitor contact tracing information is gathered by users who have reported having contact with the visitor. After a COVID-19 isolation incident is logged, a response manager can also gather contact tracing information for a user.

The Contact Tracing tab of the incident displays any individuals the user was reported to have come in contact with during the past 14 days.

Additionally, the Exposed Areas section will display all users that reported contact with an area on the same day that the affected individual did.

appian INCIDENTS ACTIVITY **PEOPLE** REPORTS CONFIGURE Response Hub

45: COVID-19 Isolation Incident - Angela Lewis

UPDATE INCIDENT UPDATE CONTACTS CLOSE INCIDENT

Summary **Contact Tracing** Related Actions

Exposed People

Use only people that were exposed in the 14 days before the positive case was reported

Notify **Isolate** **Request Tests**

 Angela Lewis <small>19/03/2021</small>	 Kaleb Malakai <small>19/03/2021</small>
	 Luka Spencer <small>19/03/2021</small>
	 Anastasia Legend <small>19/03/2021</small>
	 Elena Fondia <small>19/03/2021</small>
	 Ava Morillo <small>19/03/2021</small>

1-5 of 7

Exposed Areas

Use areas that were visited in the 14 days before the positive case was reported and people who visited areas on a common day as the impacted person

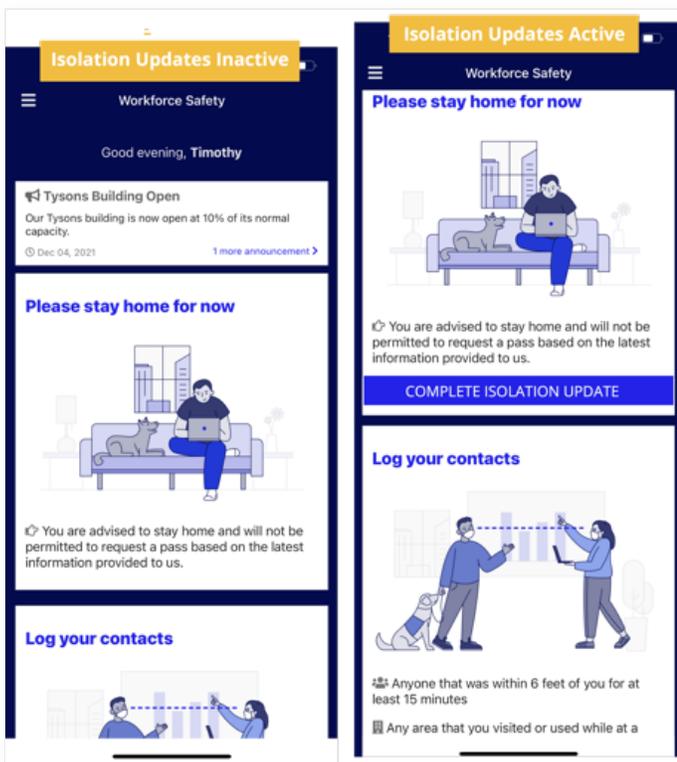
Manage Areas **Notify** **Isolate** **Request Tests**

 Main Reception - Floor 11 <small>Appian HQ</small>	 Andres Gideon <small>19/03/2021</small>
 Sales - Floor 10 <small>Appian HQ</small>	 Bailey King <small>19/03/2021</small>
 Marketing - Floor 11 <small>Appian HQ</small>	 Eden Cahin <small>19/03/2021</small>
	 Eliana Lorenzo <small>19/03/2021</small>
	 Khloe Max <small>19/03/2021</small>

1-5 of 6

Automatic isolation

Whether the COVID-19 isolation incident is created manually or automatically, the affected person will be automatically placed into isolation and any active passes they have will be revoked. This means that they cannot take a survey or request a pass. Instead, they will see an isolation section on their home page. If [Isolation Updates](#) are active, and the visibility for at least one isolation question is applicable to a user, that user will be asked to complete an [isolation update](#).



Only one COVID-19 isolation incident at a time

Users can only have one open COVID-19 isolation incident at a time. Both users and response managers cannot create a second COVID-19 isolation incident for the same user.

When a COVID-19 isolation incident would be created automatically by Workforce Safety, such as when a positive test result is submitted, but the user already has an open COVID-19 isolation case, a new incident will not be created. However, if Workforce Safety is [configured to automatically remove users from isolation](#), the countdown for removing the user and/or sending a test request is reset.

If you have upgraded Workforce Safety from v5.0 or older, users will be able to have more than one COVID-19 isolation incident open at a time because their older incidents will remain open.

Responding to COVID-19 isolation incidents

Generally, the flow that response managers will take when responding to COVID-19 isolation incidents consists of four steps:

1. Manage the incident.
2. Manage the impacted user.
3. Perform contact tracing to manage exposed users and areas.
4. Close the incident.

Managing a COVID-19 isolation incident

Managing an incident includes determining if the incident is valid and assigning it to a response manager for follow up. This is also how you can add response manager notes, which are only visible to other response managers.

To manage a COVID-19 isolation incident:

1. From the **INCIDENTS** page, find and open the incident.
2. If the incident was created in error, close the incident and choose **Invalid**.
3. If the incident is valid, update it to assign it to a response manager. Optionally, you can add a **Description**, **Response Manager Notes**, or **Attachments**.

Update Incident

Please note that any Personal Health Information contained in this incident ticket will be viewable by individuals that are responsible for reviewing and responding to incidents. Please follow your organization's HIPAA policies with respect to Personal Health Information being submitted.

Title	Incident Date	Status	Updated By	Created By
COVID-19 Isolation Incident - Timothy Kim	1/11/2022	Open	Laura Davis 1/11/2022	System Admin 1/11/2022

Incident Information

Facility *	Department *	Impacted Person	Assigned To *
Denver Office	Human Resources	Timothy Kim	Laura Davis X

Description

This incident was created as a result of a COVID-19+ test.

Response Manager Notes

Only visible to Response Managers

Attachments

UPLOAD Drop files here

CANCEL

UPDATE INCIDENT

Managing the impacted user

When you manage a COVID-19 isolation case, you may want to remove the user from isolation manually, manage test requests, or close the user's primary facility. COVID-19 isolation incidents include quick actions to perform these tasks.

Note that managing incidents for visitors is a bit different since you can't request tests for them and they don't have a primary facility.

To manage the impacted user, you can take the following actions, when necessary:

1. In the COVID-19 isolation incident, go to the **Summary** tab.
2. To manage test requests for the user, click **Upload Test Result** or **Request a Test** depending on the test request status of the user.

53: COVID-19 Isolation Incident - Timothy Kim UPDATE INCIDENT CLOSE INCIDENT

Summary Contact Tracing Related Actions

Incident Details

Impacted Person
Timothy Kim
 Vaccination Status: Waiting for Vaccine

Incident Status: Open

Incident Type: COVID-19 Isolation

Facility: **Denver Office**

Department: **Human Resources**

Assigned to: Laura Davis

Description: This incident was created as a result of a COVID-19+ test.

Created By: System Admin Created On: 1/11/2022

Updated By: Laura Davis Updated On: 1/11/2022

Response Manager Notes Only visible to Response Managers

Comments 2 Comments

Timothy Kim 9 minutes ago
User has been placed in isolation

Timothy Kim 6 minutes ago
Status changed to: Open

Write a comment... COMMENT

Comments are viewable by Response Managers and the incident reporter only.

Impacted Person Details

- Timothy Kim
- Human Resources
- example@fake.appian.com
- Appian HQ, VA

User Status

Isolated 0 Days in isolated status

Last Test Result

COVID-19 Positive 1 Day since Test Result

Upload Test Result
Request a Test
1 Day
since Test Result

Primary Facility VIEW ALL FACILITIES

Appian HQ, VA Open Facility Status

- You can also click the Testing Status card to go directly to the user's test record, if it exists.

appian INCIDENTS ACTIVITY PEOPLE REPORTS CONFIGURE Response Hub +

53: COVID-19 Isolation Incident - Timothy Kim UPDATE INCIDENT CLOSE INCIDENT

Summary Contact Tracing Related Actions

Incident Details

Impacted Person
Timothy Kim
 Vaccination Status: Waiting for Vaccine

Incident Status: Open

Incident Type: COVID-19 Isolation

Facility: **Denver Office**

Department: **Human Resources**

Assigned to: Laura Davis

Description: This incident was created as a result of a COVID-19+ test.

Created By: System Admin Created On: 1/11/2022

Updated By: Laura Davis Updated On: 1/11/2022

Response Manager Notes Only visible to Response Managers

Comments 2 Comments

Timothy Kim 13 minutes ago
User has been placed in isolation

Timothy Kim 10 minutes ago
Status changed to: Open

Write a comment... COMMENT

Comments are viewable by Response Managers and the incident reporter only.

Impacted Person Details

- Timothy Kim
- Human Resources
- example@fake.appian.com
- Appian HQ, VA

User Status

Isolated 0 Days in isolated status

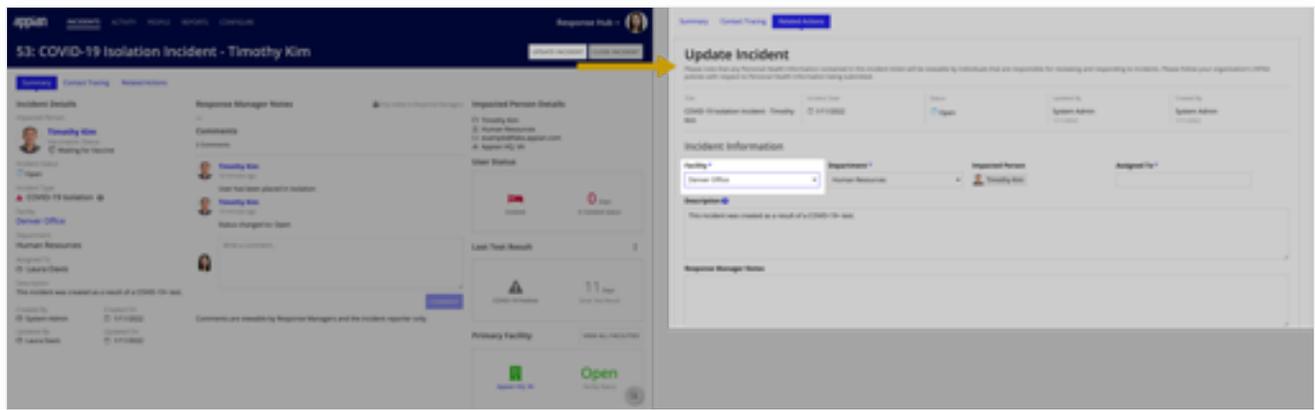
Last Test Result

COVID-19 Positive 11 Days since Test Result

Primary Facility VIEW ALL FACILITIES

Appian HQ, VA Open Facility Status

- To update the status of the user's primary facility, click **MANAGE FACILITIES**.



Performing contact tracing

Determining who was exposed to a user before they were diagnosed as positive for COVID-19 is very important to limit the spread of COVID-19. COVID-19 isolation incidents list all of the people that the user reported having contact with, along with all of the people who reported having contact with the user. Additionally, it also shows all users who reported contact with an area on the same day that the user reported being in the area.

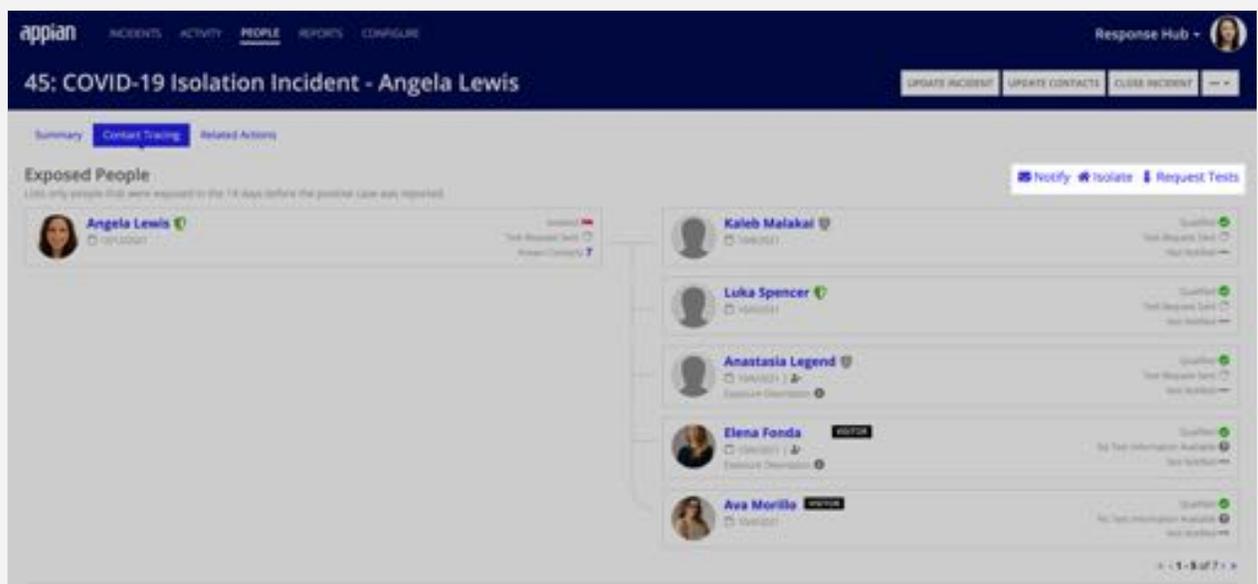
Workforce Safety uses smart suggestions to help you log contacts the Log Contacts form. These suggestions are based on a multitude of data points including a user's past logged contacts, the facilities and areas they received a pass for and visited on a given day, and department association data. This feature provides users with up to 20 contact suggestions, allowing them to quickly log a contact by simply tapping a suggestion card.

These users may have been exposed to the virus and may need to be isolated, notified, or tested. You may also need to alert all Workforce Safety users that there is a COVID-19 isolation incident via an announcement. You can perform all of these actions from the Contact Tracing tab in the COVID-19 incident.

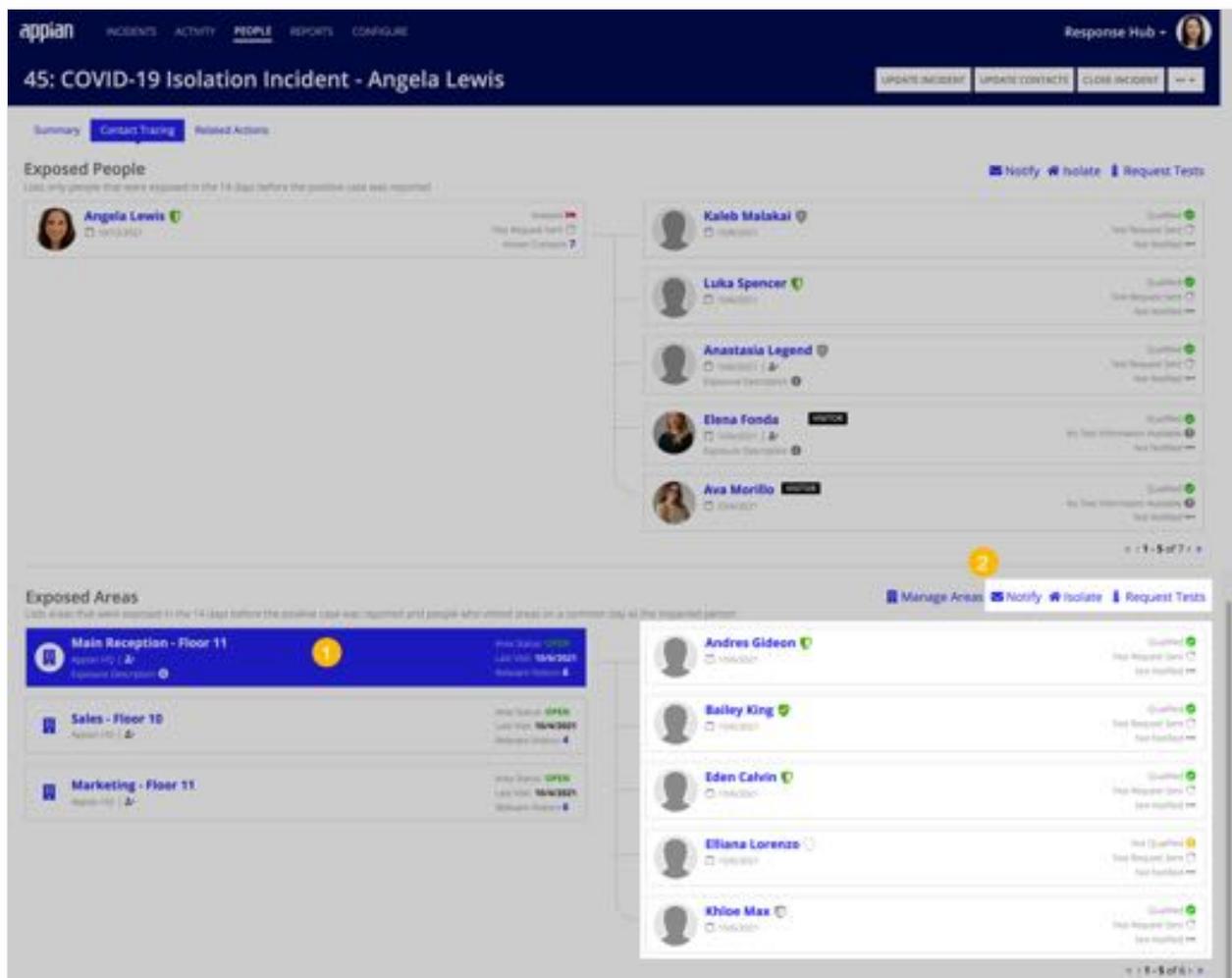
Never send any personally identifying information of any affected individuals when notifying exposed people.

To perform contact tracing for exposed people and areas:

1. In the COVID-19 isolation incident, go to the **Contact Tracing** tab.
2. Use the **Exposed People** section to manage the people that the user reported contact with.
 - Click **Notify** to send an email to the users listed in the Exposed People section.
 - Click **Isolate** to put the users listed in the Exposed People section into isolation and revoke any active passes.
 - Click **Request Tests** to request tests from the users listed in the Exposed People section.



3. In the **Exposed Areas** section, click **Manage Areas** to update the status of the areas that the user reported contact with.
4. Use the Exposed Areas section to manage the people that reported contact with an area on the same day that the affected individual did.
 - Click an area, then click **Notify**, **Isolate**, or **Request Tests** to perform the action for the users that were exposed to that area.



- At the top of the page, click **More actions** **...** > **POST ANNOUNCEMENT** to post an announcement to the entire organization about any exposures or closed locations.

Updating contacts

After a COVID-19 isolation incident is logged, you may need to update the incident's contact tracing information. This could include additional contactors or areas that were exposed to the user during the 14 days before the incident was reported.

The UPDATE CONTACTS action on the incident's Contact Tracing tab allows response managers to add, remove, or edit close contacts or areas for a user. Note that you can add one or more people or areas to a user's contact tracing information.

To update the contacts for a user's COVID-19 isolation incident:

- From the **INCIDENTS** page, find and open the incident.
- Select the **Contact Tracing** tab and click **UPDATE CONTACTS**.
- Click **ADD PEOPLE** and enter the following information in the **Exposed People** section:
 - Most Recent Contact Date**
 - Exposed People**
 - Exposure Description**
- Click **ADD**.
- In the left pane, select **Exposed Areas**.
- Click **ADD AREAS** and enter the following information in the **Exposed Areas** section:
 - Most Recent Contact Date**
 - Exposed Areas**
 - Exposure Description**
- Click **ADD**.
- Click **UPDATE**.

Close the incident

You may also need to close the incident, but this will happen automatically if you have Workforce Safety configured to remove users from isolation automatically.

To close an incident manually:

- In the COVID-19 isolation incident, click **Close Incident**.

2. Choose whether you are closing the incident because it is **Resolved** or it was an **Invalid** incident.
3. Choose whether to remove the impacted user from isolation by selecting or deselecting the **Remove [User] from isolation** checkbox. Click **CLOSE INCIDENT**.

53: COVID-19 Isolation Incident - Timothy Kim [UPDATE INCIDENT] [CLOSE INCIDENT]

Summary | Contact Tracing | Related Actions

Incident Details

Impacted Person: **Timothy Kim** (Vaccination Status: Waiting for Vaccine)

Incident Status: **Open**

Incident Type: **COVID-19 Isolation**

Facility: **Denver Office**

Department: **Human Resources**

Assigned To: **Laura Davis**

Description: This incident was created as a result of a COVID-19+ test.

Created By: System Admin | Created On: 1/11/2022

Updated By: Laura Davis | Updated On: 1/11/2022

Response Manager Notes (Only visible to Response Managers)

Comments (2 Comments)

- Timothy Kim (10 minutes ago): User has been placed in isolation.
- Timothy Kim (10 minutes ago): Status changed to: Open.

Write a comment... [COMMENT]

Comments are viewable by Response Managers and the incident reporter only.

Impacted Person Details

- Timothy Kim
- Human Resources
- example@fake.appian.com
- Appian HQ, VA

User Status

Isolated | 0 Days in Isolated Status

Last Test Result

COVID-19 Positive | 11 Days Since Test Result

Primary Facility [VIEW ALL FACILITIES]

Appian HQ, VA | Open (Facility Status)

Reopening closed incidents

You can reopen closed COVID-19 isolation incidents. If you do, the user will automatically be placed into isolation again.

53: COVID-19 Isolation Incident - Timothy Kim [UPDATE INCIDENT] [REOPEN INCIDENT]

Summary | Contact Tracing | Related Actions

Incident Details

Impacted Person: **Timothy Kim** (Vaccination Status: Waiting for Vaccine)

Incident Status: **Closed - Resolved**

Incident Type: **COVID-19 Isolation**

Facility: **Denver Office**

Department: **Human Resources**

Assigned To: **Laura Davis**

Description: This incident was created as a result of a COVID-19+ test.

Created By: System Admin | Created On: 1/11/2022

Updated By: Laura Davis | Updated On: 1/11/2022

Response Manager Notes (Only visible to Response Managers)

Comments (2 Comments)

- Timothy Kim (11 minutes ago): User has been placed in isolation.
- Timothy Kim (11 minutes ago): Status changed to: Open.
- Laura Davis (3 minutes ago): Status changed to: Closed - Resolved.

Comments are viewable by Response Managers and the incident reporter only.

Impacted Person Details

- Timothy Kim
- Human Resources
- example@fake.appian.com
- Appian HQ, VA

User Status

Quarantined

- No disqualifying answers to intake questionnaire
- No open incidents

Last Test Result

COVID-19 Positive | 11 Days Since Test Result

Primary Facility [VIEW ALL FACILITIES]

Appian HQ, VA | Open (Facility Status)

Removing a user from isolation manually

You can configure Workforce Safety to [remove users from isolation automatically](#). However, you can also remove a user from isolation manually from their user summary.

If you remove a user from isolation that has an open COVID-19 isolation incident, the incident will be automatically closed.

To manually remove a user from isolation:

1. From anywhere in the Response Hub, click the user's name and go to the **Summary** tab.
2. Click **REMOVE USER FROM ISOLATION**.
3. Confirm the action by clicking **REMOVE FROM ISOLATION**.



The user's status updates to the last status they were in before being placed into isolation, either Qualified, Not Qualified, or Status Pending.

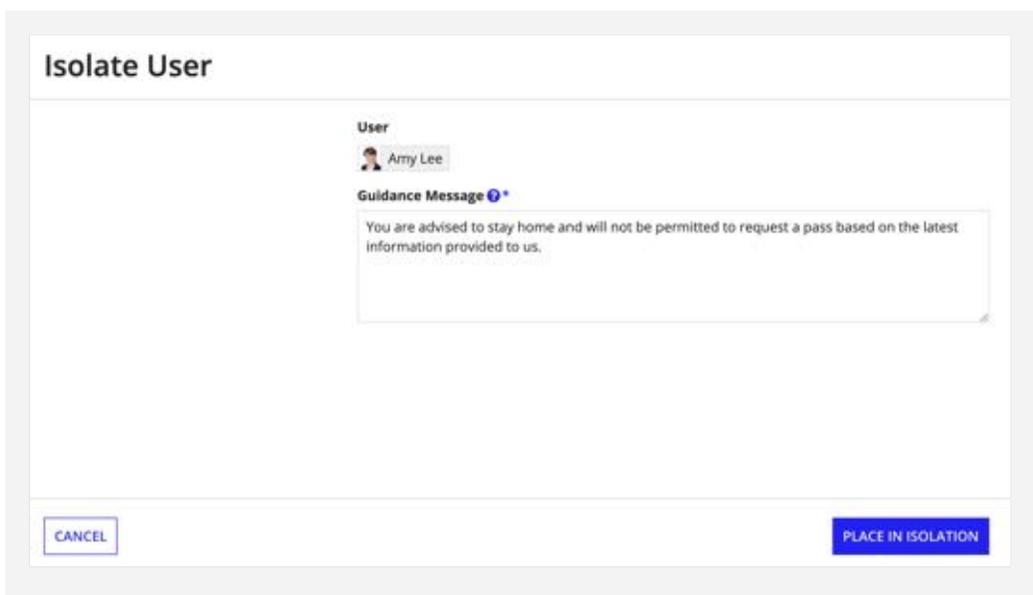
Isolating a user manually

More than likely, users will be put into isolation through a COVID-19 isolation incident, or through contact tracing. However, you can also manually put a user into isolation from their user summary.

After you isolate a user, any active passes they have will be revoked.

To manually put a user into isolation:

1. From anywhere in the Response Hub, click the user's name and go to the **Summary** tab.
2. Click **ISOLATE USER**.
3. Enter a **Guidance Message** that you would like to email to the user.
 - o **Note:** For example, you may want to explain how often they should complete the isolation update. This default message can be [updated from the Configure page](#).
4. Click **PLACE IN ISOLATION**.



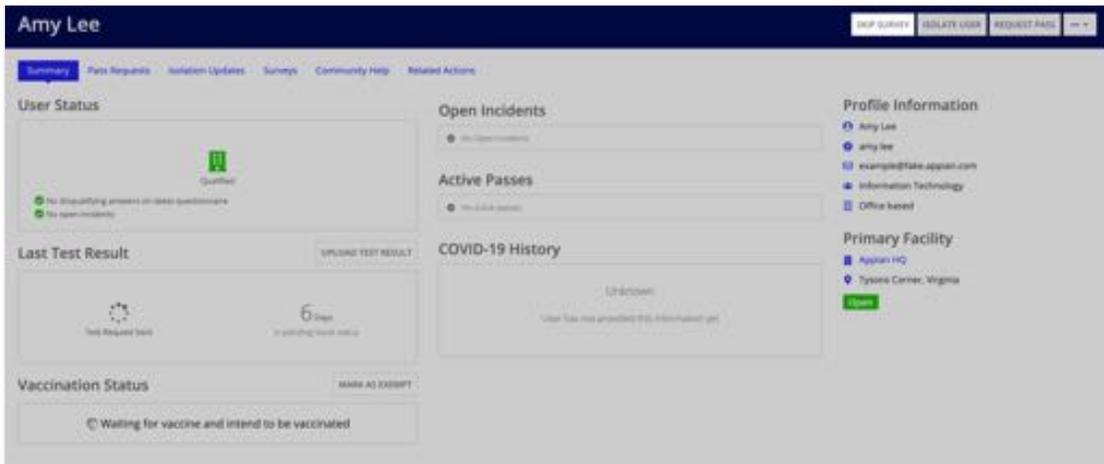
Skip survey for a user

If there is an active survey and a user receives a Not Eligible status after completing it, or they haven't taken it yet, response managers can choose to skip the survey for the user.

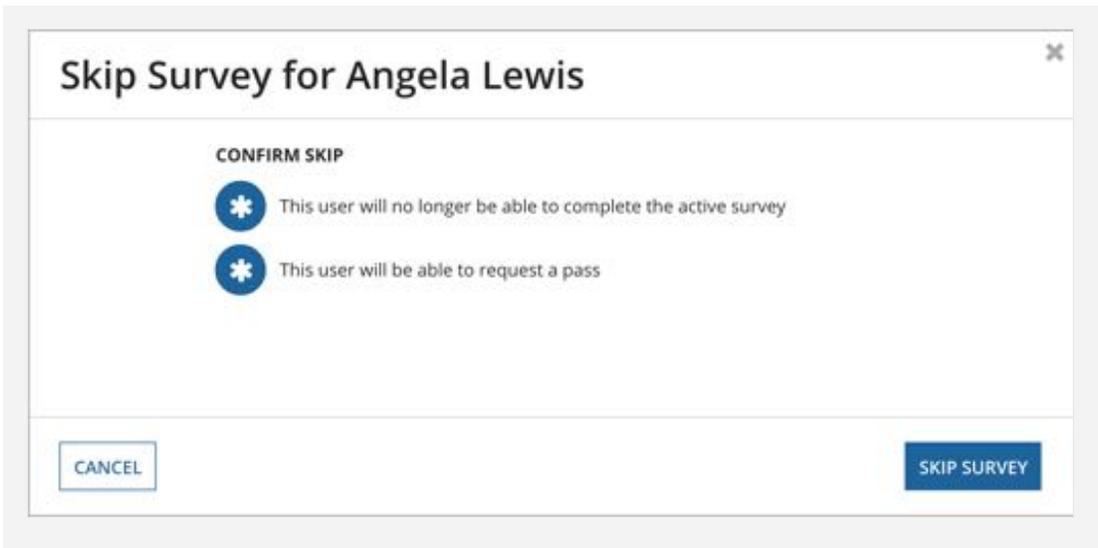
If you skip the survey for a user, they will no longer be able to complete the currently active survey.

To skip the survey for a user:

1. From anywhere in the Response Hub, click the user's name and go to the **Summary** tab.
2. Click **SKIP SURVEY**.
 - o **Tip:** If there is no active survey, this action does not display.



3. Confirm the action by clicking **SKIP SURVEY**.



The user will be placed in a Qualified state and will be able to request a pass immediately.

Requesting tests

Response managers can request that users take COVID-19 tests either from the user's profile, the People page, or the Contact Tracing tab of a COVID-19 isolation incident. On the people page they can request test results from individuals or groups, including the ability to select a random sample from a group. This can help response managers determine the spread of an outbreak, check the status of a population, and target individuals for testing.

Additionally, response managers can request pooled sampling, which means that samples from several people are combined and tested together. A negative result means that every individual is negative for COVID-19, while a positive result can lead to further testing to narrow down the positive cases.

Response managers can determine their own process for testing and can notify individuals of that process when they request a test.

To request COVID-19 tests from the People page:

1. Go to the **PEOPLE** page.
2. Click **REQUEST TESTS**.
3. Filter the list to select the user or users that you would like to test and click **NEXT**.

Request COVID-19 Tests

Select Users Enter Request Details Review

Filter down the batch of users for the request

User **Role** **Primary Facility**

Last Tested On or After **Last Test Result** **Active Test**

Pass Eligibility **Department**

Filtered Users

User	Department	Location	Role	Pass Eligibility	Last Test Result	Active Test?	Last Tested
Ace Rylan	Marketing	USA HQ Alexandria, Virginia, United States	Office based	Status Pending	No Result	<input type="radio"/>	
Adalyn Elliott	Human Resources	New York Office New York, New York, United States	Office based	Qualified	No Result	<input type="radio"/>	
Adalynn Nathaniel	Information Technology	USA HQ Alexandria, Virginia, United States	Office based	Qualified	No Result	<input type="radio"/>	

4. Enter a **Batch Name**.
5. (Optional) Enter a **Batch Description**.
6. If you selected at least ten users, select if you would like to request COVID-19 tests for a random sample of the selected users, then enter the random sampling percentage.
7. If you selected at least three users, select if you would like to request a pooled testing result. This will require the response manager to upload the test result.
8. If you did not select a pooled testing result, select if you would like to require response managers to verify the test results. See [Verifying test results](#) for more information.
9. Enter **Testing Guidance** that you would like to display for users.
 - **Example:** You may want to explain where they can get an onsite test. This default message can be [updated from the Configure page](#).
10. Click **NEXT**.

Request COVID-19 Tests

Select Users Enter Request Details Review

Indicate the type of testing to perform for this batch

Batch Name *

Batch Description

Randomly Sample From Selected Users? *
 Yes No

Random Sampling Percentage *

Enter a number greater than 0 and less than 100. Sample size based on selected users and percentage above: 6 Users

Pool Samples for Test Result? *
 Yes No

Require Response Manager Verification of Test Result Evidence? *
 Yes No

Testing Guidance *

11. A list of the users who will be sent a test displays. Click **SEND REQUESTS**.

Request COVID-19 Tests

Select Users | Enter Request Details | Review

Review Users

Filtered Users

User	Department	Location	Role	Pass Eligibility	Last Test Result	Active Test?	Last Tested
Amy Lee	Human Resources	Boston Office Boston, MA, Massachusetts, United States	Office based	Isolated	Positive	⊗	Oct 14 2020
Brian Chen	Human Resources	US HQ Tysons Corner, VA, Virginia, United States	Office based	Workplace Eligible	Positive	⊗	Oct 04 2020
Chris Watkins	Human Resources	US HQ Tysons Corner, VA, Virginia, United States	Office based	Workplace Eligible	No Result	⊗	
Debra Harrison	Human Resources	US HQ Tysons Corner, VA, Virginia, United States	Office based	Workplace Eligible	No Result	⊗	
Ruth Jackson	Human Resources	Boston Office Boston, MA, Massachusetts, United States	Office based	Workplace Eligible	No Result	⊗	
Valerie Boyce	Human Resources	New York Office New York, NY, New York, United States	Office based	Survey Qualified	No Result	⊗	

6 items

BACK CANCEL SEND REQUESTS

After test result requests are sent, users can [acknowledge and submit their test results](#).

For any test request that has **Yes** selected for **Require Response Manager Verification of Test Result Evidence?**, response managers will have to [approve or reject the test result](#).

Response managers can also [provide test results on behalf of users](#). For pooled testing, response managers must always provide the test results.

Verifying test results

For any COVID-19 test request that has **Yes** selected for **Require Response Manager Verification of Test Result Evidence?**, response managers will have to approve the result in order for the test result request to be completed. If they reject the test result, the user will be sent an email with the reason and will be requested to submit their results again.

To verify a test result:

1. On the **ACTIVITY** page, go to the **INDIVIDUAL TESTS** tab.
2. To filter the results to only the ones that require verification, for the **Request Status** filter, select **Pending Verification**.
3. Click the **Request** number for the request that you would like to verify.

PASS REQUESTS SURVEYS ISOLATION UPDATES **INDIVIDUAL TESTS** POOL TESTS COMMUNITY HELP

Request Name:

User:

Request Status:

Result:

Test Requested On:

Sample Collection Date:

PROVIDE TEST RESULT

CANCEL TEST REQUESTS

<input type="checkbox"/>	Request	User	Request Name	Request Status	Test Requested On	Sample Collection Date	Result	Lab Result
<input type="checkbox"/>	25	Amy Lee	HR Dept Test Request	Pending Verification	Sep 13, 2020 5:24 PM	Sep 13 2020	Negative	

4. Click **APPROVE** or **REJECT**.

Test Request #60

Summary **Related Actions**

Test Result

Negative - Does not have Covid-19

Test Details

Request Status Pending Verification

Requestee Name Karen Anderson

Date of Test Request Aug 19 2020

Sample Collected Date Aug 18 2020

Results Submitted On Aug 19 2020

Test Batch

Batch Name Single Test Request for Karen Anderson

Description

Random No

Pooled No

Supporting Documentation

IMG_1045

Uploaded Lab Result

Messages at 7:07 PM 100%

Home > Test Result

Test Result

Event : (7/21/2020 5:00:00 AM)

Patient (Last Initial, First Initial) :

Test Result Details

Test Result
Negative

Test Result Date
1/23/2020

5. If the result was rejected, enter the reason, then click **REJECT**. An email will be sent to the user with the reason and they will be asked to submit their test results again.

Review Test Result Evidence

Uploaded test result is more than 7 days old.

CANCEL

REJECT

6. If the result is approved, click **APPROVE** to complete the test result.

Review Test Result Evidence

On clicking approve, the test result will be completed

CANCEL

APPROVE

After the test result is approved, the **Request Status** updates to **Completed** and the **Result** displays for the user.

<input type="checkbox"/>	Request	User	Request Name	Request Status	Test Requested On	Sample Collection Date	Result	Lab Result
<input type="checkbox"/>	60	Karen Anderson	Single Test Request for Karen Anderson	Completed	Aug 19, 2020 11:02 PM	Aug 18 2020	Negative	

Providing test results

If the organization is coordinating their own COVID-19 testing, response managers may receive the test results and be able to submit them on behalf of users. Additionally, for pooled testing, response managers must be the ones to submit the test result since all of the samples for the individuals are combined into one sample. Because of this, response managers can submit test results from the Tests report.

To provide a test result for an individual test:

1. On the **ACTIVITY** page, go to the **INDIVIDUAL TESTS** tab.
2. Select the user that you would like to provide a test result for.
3. Click **PROVIDE TEST RESULT**.

<input type="checkbox"/>	Request	User	Request Name	Request Status
<input checked="" type="checkbox"/>	48	Karen Anderson	Single Test Request for Karen Anderson	Pending Result

4. Enter the information for the test and click **SUBMIT**.

What was the result of COVID-19 test?

(I have COVID-19)
 (I do not have COVID-19)
 (Results were indeterminate)

When was the test conducted? *
08/18/2020

Where was the test conducted? *
Onsite clinic

Upload the test result *
 Test Result 1075652
 JPG - 97.59 KB

Supporting documents
 Drop files here

The **Request Status** for the user is updated to **Completed** and the **Result** displays for the user. A review is not required.

Request	User	Request Name	Request Status	Test Requested On	Sample Collection Date	Result
48	Karen Anderson	Single Test Request for Karen Anderson	Completed	Aug 18, 2020 05:56 AM	Aug 18 2020	Negative

To provide a test result for a pooled test:

1. On the **ACTIVITY** page, go to the **POOLED TESTS** tab.
2. Select the pool request that you would like to provide a test result for.
3. Click **PROVIDE TEST RESULT**.

<input type="checkbox"/>	Request	Pool Name	Pool Status
<input checked="" type="checkbox"/>	21	Pooled testing for IT	Pending Result

4. Enter the information for the test and click **SUBMIT**.

What was the result of COVID-19 test?

Upload the test result
 Drop file here

Supporting documents
 Drop files here

If the pool test result is negative, the **Result** for all individuals in the pool will be updated to **Negative**. If the pool test result is positive, the **Result** for all individuals in the pool will be updated to **No Result** and response managers should request individual test results from the group.

Batch #19 - Pooled testing

Summary

Related Actions

 **Negative** - No one in this group tested positive for COVID-19

Test Batch Details

Request Date	Aug 19 2020
Completion Date	Aug 19 2020
Total Students in Test Group	4
Students in Random Sample	Yes
Tests in Progress	No

Batch Membership

Request	User	Request Status	Result	Report	Test Requested On
52	Karen Anderson	Completed	Negative		Aug 19, 2020 07:25 PM
51	Amy Lee	Completed	Negative		Aug 19, 2020 07:25 PM
50	Angela Lewis	Completed	Negative		Aug 19, 2020 07:25 PM
49	Anthony Hill	Completed	Negative		Aug 19, 2020 07:25 PM

Verifying proof of vaccination

If the **Require Proof of Vaccination Verification** toggle is turned on, Response managers can quickly verify proof of vaccination for all employees who have uploaded vaccination documentation to their profile form.

appian INCIDENTS ACTIVITY PEOPLE REPORTS CONFIGURE Response Hub

← Back to General Settings

COVID-19 & Vaccination History

Use this form to collect information about your users' COVID-19 health, including vaccination and COVID-19 positivity history. Questions configured below are shown to users in their Profile form. Insights on this data are available in the Reports tab.

Active. COVID-19 health information is being collected from users via their Profile form. DISABLE

COVID-19 & Vaccination History Options

Manage the health information request workflow

- Require Proof of Vaccination Verification**
When toggled on, users who report they are fully vaccinated must provide proof of vaccination. This documentation can then be reviewed by Response Managers via the Incidents tab. Once verified, users are classified as "Fully Vaccinated (Verified)".
- Skip Pass Request Questions for Fully Vaccinated Employees**
When toggled on, fully vaccinated employees can request and receive a pass without answering the configured pass request questions. When toggled off, fully vaccinated employees must answer pass request questions in a qualifying manner to receive a pass. If the "Require Proof of Vaccination Verification" option is enabled, only employees who have been verified as fully vaccinated can skip questions.
- Ask for user consent**
When toggled on, users will be asked to acknowledge the configured consent statement prior to submitting their information.

Provide the user consent message SAVE

COVID-19 & Vaccination History Configuration

Questions configured below are shown to users in their profile form. Insights on this data are available in the reports tab. To view and configure the prompts that users see to update their COVID-19 history, [click here](#).

Vaccination Questions

Active	Required	Question	Question Shown	Response / Response Type
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Which of the following best describes your COVID-19 vaccination status?	Always	<ul style="list-style-type: none"> Waiting for vaccine and intend to be vaccinated Partially vaccinated and awaiting more doses Fully vaccinated and completed dose series Do not intend to be vaccinated Prefer Not to Answer
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vaccine Name / Manufacturer	When selected vaccination status is <ul style="list-style-type: none"> Partially vaccinated and awaiting more doses Fully vaccinated and completed dose series 	<ul style="list-style-type: none"> Other COVID-19 Vaccine Do not know / Prefer not to answer Pfizer BioNTech COVID-19 Vaccine Moderna COVID-19 Vaccine Edit Vaccine Opt...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date of Most Recent Dose	When selected vaccination status is <ul style="list-style-type: none"> Partially vaccinated and awaiting more doses Fully vaccinated and completed dose series 	Date
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Provide further explanation as to why you do not intend to be vaccinated	When selected vaccination status is <ul style="list-style-type: none"> Do not intend to be vaccinated 	Text
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Related documentation	When selected vaccination status is <ul style="list-style-type: none"> Do not intend to be vaccinated 	File Upload
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Proof of Vaccination	When selected vaccination status is <ul style="list-style-type: none"> Partially vaccinated and awaiting more doses (Optional) Fully vaccinated and completed dose series (Required) 	File Upload

4 items

After a user provides proof of vaccination, they'll show up in the **Vaccination Verification** review portal. To quickly determine if you have employees that require a verification review, navigate to the **INCIDENTS** page and look for the alert banner at the top of the page. This banner displays how many employees have submitted their proof of vaccination and are in the review queue.

appian INCIDENTS ACTIVITY PEOPLE REPORTS CONFIGURE Response Hub

You have 8 employee vaccinations to verify VERIFY PROOF OF VACCINATION

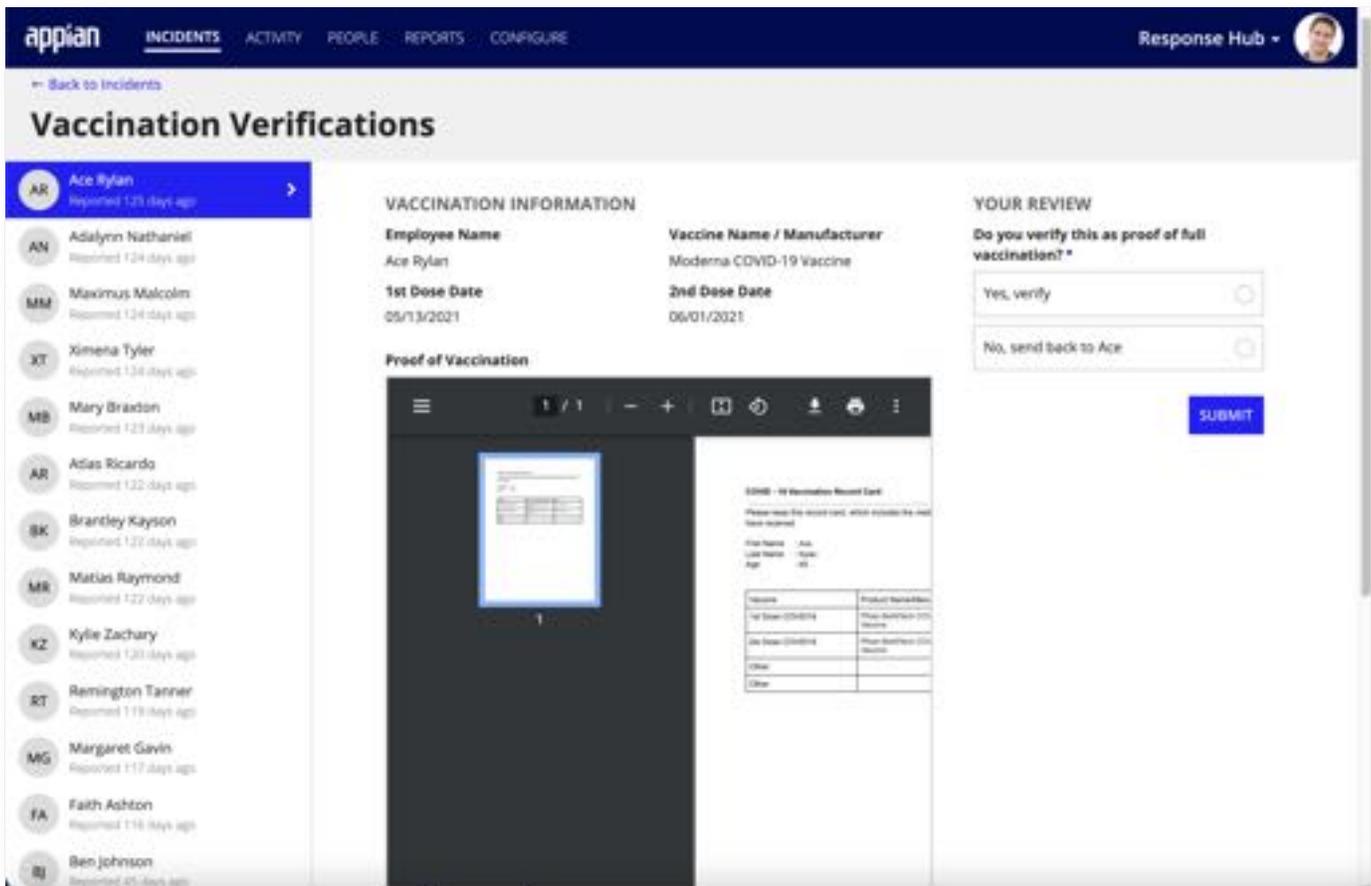
SEARCH INCIDENTS SEARCH STATUS: Any TYPE: Any ASSIGNED: Any

IMPACTED PERSON: Any USER TYPE: Any FACILITY: Any DEPARTMENT: Any

REPORT INCIDENT

Status	Incident ID	Type	Assignee	Impacted Person	Facility	Department	Last Updated
<input type="checkbox"/>	20	Pass Request Response	Unassigned	David Evans	Appian HQ	Marketing	Mar 1 12:49AM
<input type="checkbox"/>	23	Pass Request Response	Unassigned	Kaylee Ayden	Appian HQ	Marketing	Feb 28 12:50AM
<input type="checkbox"/>	24	Pass Request Response	Unassigned	Melanie Micah	Appian HQ	Marketing	Feb 28 12:50AM
<input type="checkbox"/>	26	Pass Request Response	Unassigned	Karen Anderson	Appian HQ	Information Technology	Feb 27 12:50AM

Click **VERIFY PROOF OF VACCINATION** to access the review portal. In the left panel, you'll see an ordered list of all employees who have submitted their proof of vaccination by submission date.



When you click on an employee in the queue, you'll also see relevant vaccination information they provided, including the vaccine name/manufacturer, the most recent date of their first and second vaccination dose, and their uploaded documentation.

To verify vaccination proof:

1. From the **INCIDENTS** page, click **VERIFY PROOF OF VACCINATION**.
2. In the left pane, locate the employees list in the review queue.
 - o **Note:** By default, the employees list is automatically sorted on the earliest vaccination submission date to the latest.
3. Review the uploaded documentation in the **Proof of Vaccination** document window.
4. Under **YOUR REVIEW**, select **Yes, verify** to confirm the employee's proof of vaccination or select **No, send back to employees name** to reject the employee's proof of vaccination.
 - o **Note:** If you select **No, send back to employees name**, you must provide a feedback comment in the provided field, which will be visible to the employees when they edit their vaccination information.
5. Click **SUBMIT**.
6. Repeat **steps 3-5** for each employee in the review queue.

Deleting user data

If a user requests to have their data removed from Workforce Safety, response managers can do this using the Delete User Data option. This option allows you to delete user pass request and survey responses, help requests, incidents, or volunteer information.

Deleting data affects assignments for existing incidents and help requests. For example, if a volunteer is assigned to a help request and their data is deleted, the help request will become unassigned.

COVID-19 isolation incidents cannot be deleted from this page.

You can't delete specific rows of information. You can only delete all of the information of a certain type.

To delete user data:

1. From anywhere in the Response Hub, click the user's name and go to the **Summary** tab.
2. Click **DELETE USER DATA**.
3. Click the delete button for the data that you would like to remove.

4. Confirm that you would like to delete the data.
5. Repeat for each information type.

Delete User Data

Delete pass requests and surveys, help requests, incidents, or volunteer information for a specific user

User *

 Sally Taylor ✕

Pass Requests and Surveys

[DELETE PASS REQUESTS AND SURVEYS](#)

Name	Reporter	Date
Pass Request - yesterday 3:38 am	Sally Taylor	8/11/2020
Pass Request - yesterday 2:50 am	Sally Taylor	8/11/2020
Survey - Jul 24	Sally Taylor	7/24/2020

< 1 - 3 of 6 >

Help Requests

[DELETE HELP REQUESTS](#)

Name	Status	Date
Could someone pick up my groceries?	In Progress	5/7/2020
I need help picking up groceries	Unassigned	5/1/2020
Please mail some supplies	Unassigned	4/16/2020

<< < 1 - 3 of 7 > >>

Managing Visitors

Introduction

Most organizations have numerous external visitors that need to access their facilities. Workforce Safety allows your organization to hold external visitors such as contractors, maintenance personnel, and vendors to the same standards as employees.

With Workforce Safety, hosts can add visitors by simply providing the visitor's name and email address. After the host schedules a visit, the visitor will be able to request a pass to a facility to verify they are safe to be there.

Adding visitors also allows them to be selected for contact tracing if they are exposed to any employees that have tested positive for COVID-19. If they are exposed or diagnosed with COVID-19, they can also be placed into isolation so that they can't request a pass until they are removed from isolation.

See also

- See the Response Hub User Guide for instructions on how screeners and response managers can [schedule visits](#) and [request passes](#) for visitors.
- For instructions on how end users can [host visitors](#), see the Home Page User Guide.

Visitor workflows

Depending on the organization, visitors may have two different options for registering to visit a facility.

Visitors can always register remotely. However, if your organization has screeners at your facility, they may also be able to complete the entire registration process on site.

Remote registration process

Visitors can register before they get to a facility if a host adds them to Workforce Safety and schedules a visit for them.

To register remotely:

1. The host adds the visitor to Workforce Safety using the visitor's email address and [schedules a visit](#) for the days they will be visiting.
 - **Note:** An account creation email is automatically sent, asking the visitor to reset their temporary password.
2. The visitor uses the account creation email to log in to Workforce Safety for the first time and resets their temporary password.
3. On the Workforce Safety site, the visitor clicks **CHECK IN NOW** for the day and facility they are visiting and performs the steps to check in.
4. If the visitor is eligible to visit the facility, they can click **VIEW PASS** to display the pass.

On-site registration process

If an organization has a process to screen visitors when they get to a facility, visitors can register on site to visit the facility.

To register a visitor after they arrive at the facility:

1. The screener [schedules a visit](#) for the visitor, registering them using the visitor's email address.
 - **Note:** The screener will be listed as the host for the visitor.
2. The screener [requests a pass](#) on behalf of the user, selecting their newly added account name from the picker.

After the screener registers the visitor, the visitor will receive an account creation email to reset their temporary password. However, they don't need to complete the password reset for the screener to request a pass.

What can response managers do and see for visitors?

Response Managers can do the following for visitors in the response hub:

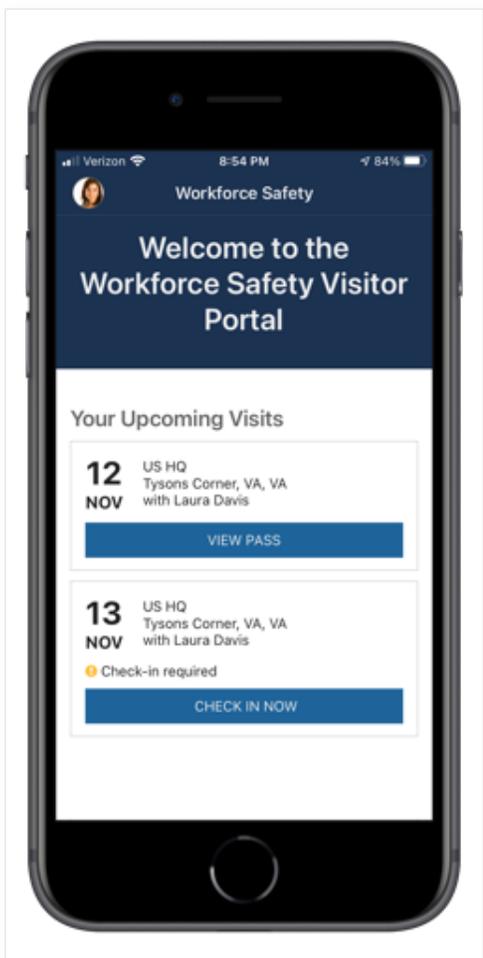
- [Isolate](#) them and [remove them from isolation](#).
- Create incidents for them, including [COVID-19 isolation incidents](#).
- [Request passes](#) for them.
- [Schedule visits](#) for them.
- [Delete their user data](#).

You cannot request tests for visitors and they do not appear in the People report.

What can visitors do and see in Workforce Safety?

Visitors do not see the Workforce Safety home page. Instead they see the visitor portal where they can:

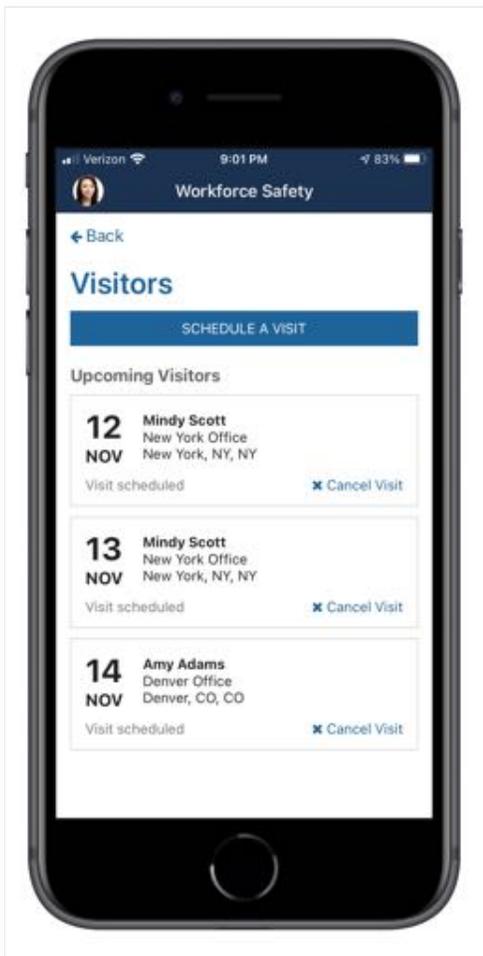
- Request a pass for days they are scheduled to visit.
- View and display their passes.
- View upcoming visits.



Visitors do not see announcements. They also cannot log contacts. However, when other users log contacts, they can select visitors. As a result, if a visitor has a COVID-19 isolation incident, the users that have reported contact with them display in the Contact Tracing tab of the incident.

What is a host and how do I make someone a host?

Hosts can access the visitor portal from the Workforce Safety home page where they can [schedule visits](#) and view and [cancel](#) upcoming visits. They can also add new visitors when they are scheduling a visit.



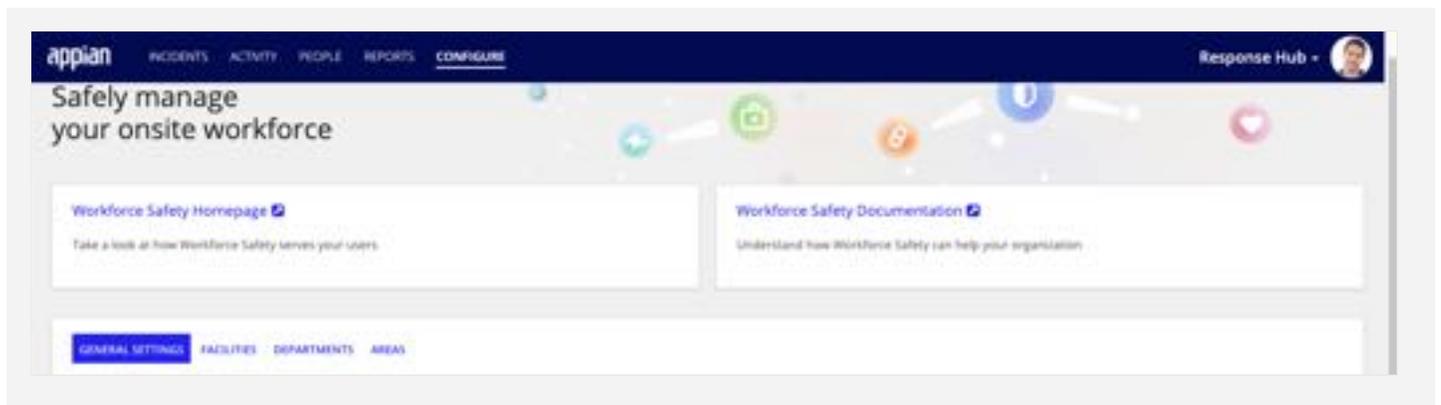
To make someone a host, all you have to do is [add them](#) to the Workforce Safety Hosts group.

If you would like to give all users access to host, simply add the Workforce Safety Users group to the Workforce Safety Hosts group.

Configure Site

Introduction

Workforce Safety empowers business users to get the most out of the solution by providing feature-centric configuration options from the **CONFIGURE** page. This workflow allows users to configure site options to match the needs of their organization and users.



If this is your organization's first-time using Workforce Safety, the solution walks you through a guided experience when configuring questionnaires, departments, and facilities needed for user profile setup and the pass request flow.

From the **CONFIGURE** page, users can quickly access the Workforce Safety Homepage and solution documentation, including the [Response Hub User Guide](#) and other publicly available Workforce Safety documentation. In addition, response managers can access specific settings in each tab and configure specific site options to match the needs of their organization.

Page navigation

Workforce Safety makes it easy to navigate between the configuration options by dividing them into four tabs: **GENERAL SETTINGS**, **FACILITIES**, **DEPARTMENTS**, and **AREAS**.

GENERAL SETTINGS allow business users to:

- Manage questionnaire settings:
 - [Configure questionnaires](#) for Pass Requests, Intake Surveys, and Isolation Updates.
 - Manage the [guidelines](#) that can be displayed to users when they select certain question responses.
- Manage site features:
 - This includes COVID-19 & Vaccination History, Incident Management, COVID-19 Testing, Capacity Management, Cohort Management, Safety Guidelines, and Community Volunteering.
 - Users can enable and disable certain features and toggle the functionality of certain site features on or off. For example, when you activate COVID-19 & Vaccination History, you can toggle User Consent, vaccination questions, or both on or off.
- Manage User Communication and Resources:
 - Target announcements to all users or users in specific departments, facilities, or both.
 - Update the [helpful links](#) and [policy documents](#).
- Manage system settings:
 - [Brand the site](#) to match your organization's colors and logo.
 - Configure [Group membership](#), which determines what users can see and do in the Response Hub.
 - Determine when to [archive data](#). Administrators can configure what data to archive and when to archive it, which may help Workforce Safety run faster.

The FACILITY tab allows response managers, facility managers, and configuration managers to [configure and manage all of their facilities](#).

The DEPARTMENTS tab allows response managers to specify the structure of their organization by defining specific departments and mapping them to a cohort. This allows users to select departments they belong to in their user profile.

Finally, the AREAS tab allows response managers to configure areas for all facilities and to break their facilities into smaller components like floors and cafeterias. This ensures users will be able to request passes from them.

Users who are only in the **Workforce Safety Users** group do not have access to the Response Hub. Users who can see the Response Hub will be restricted to the actions that they need to perform only. For more information on what actions and information is accessible to members of the Workforce Safety security groups, see the [Groups Reference Page](#).

See also

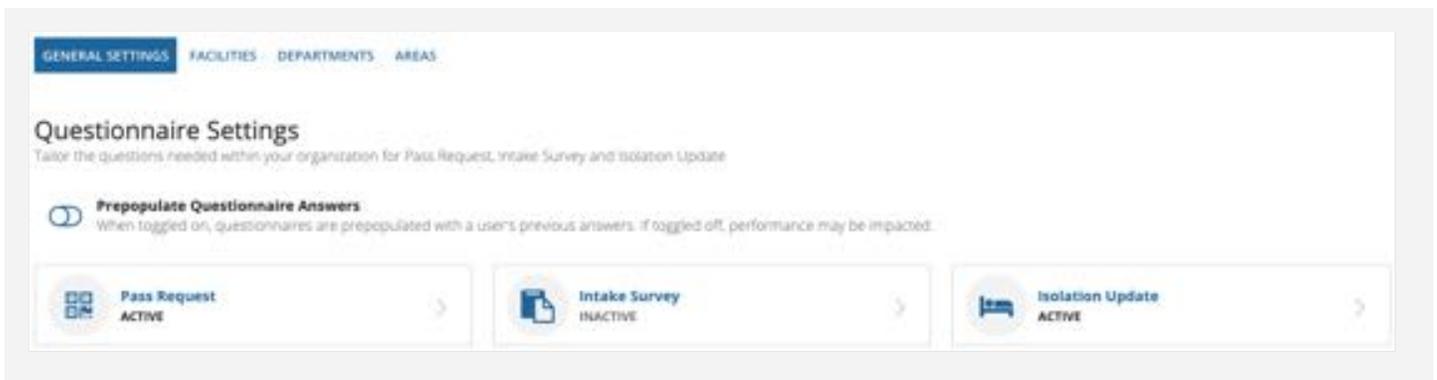
- For an overview of the Response Hub, see the [Response Hub Overview](#).
- For instructions on how to use the rest of the Response Hub, see the [Response Hub User Guide](#).

Configure Questionnaires

From the **GENERAL SETTINGS** tab, you can configure and manage the settings for questionnaires you want users in your organization to complete.

Questionnaire types

From the **CONFIGURE** page, there are three types of questionnaires you can configure for users in your organization: **Pass Requests**, **Surveys**, and **Isolation Updates**.



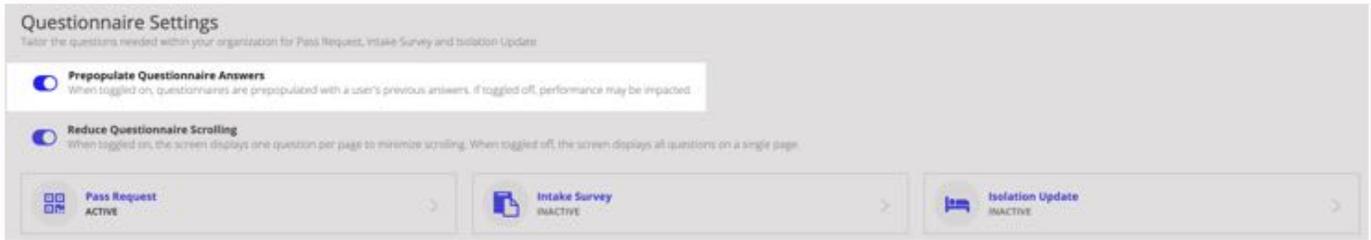
In the **Questionnaire Settings** section, simply click the type of questionnaire you want to configure to get started. You can select from the following:

- **Pass Request:** a set of questions that users can respond to each day before they come to a workplace. You can use this to determine if a user should be able to come to the workplace based on their responses.
- **Survey:** a set of questions that can be sent to users before they start requesting passes. You can use this to gauge interest and ability to return to the workplace.
- **Isolation Update:** a set of questions that you want users to answer when in [isolation](#). If you choose to have users complete an **Isolation Update**, you can use this to check if exposed individuals are developing symptoms, determine how sick individuals are doing, or anything else you think is helpful.

Populate questionnaire answers

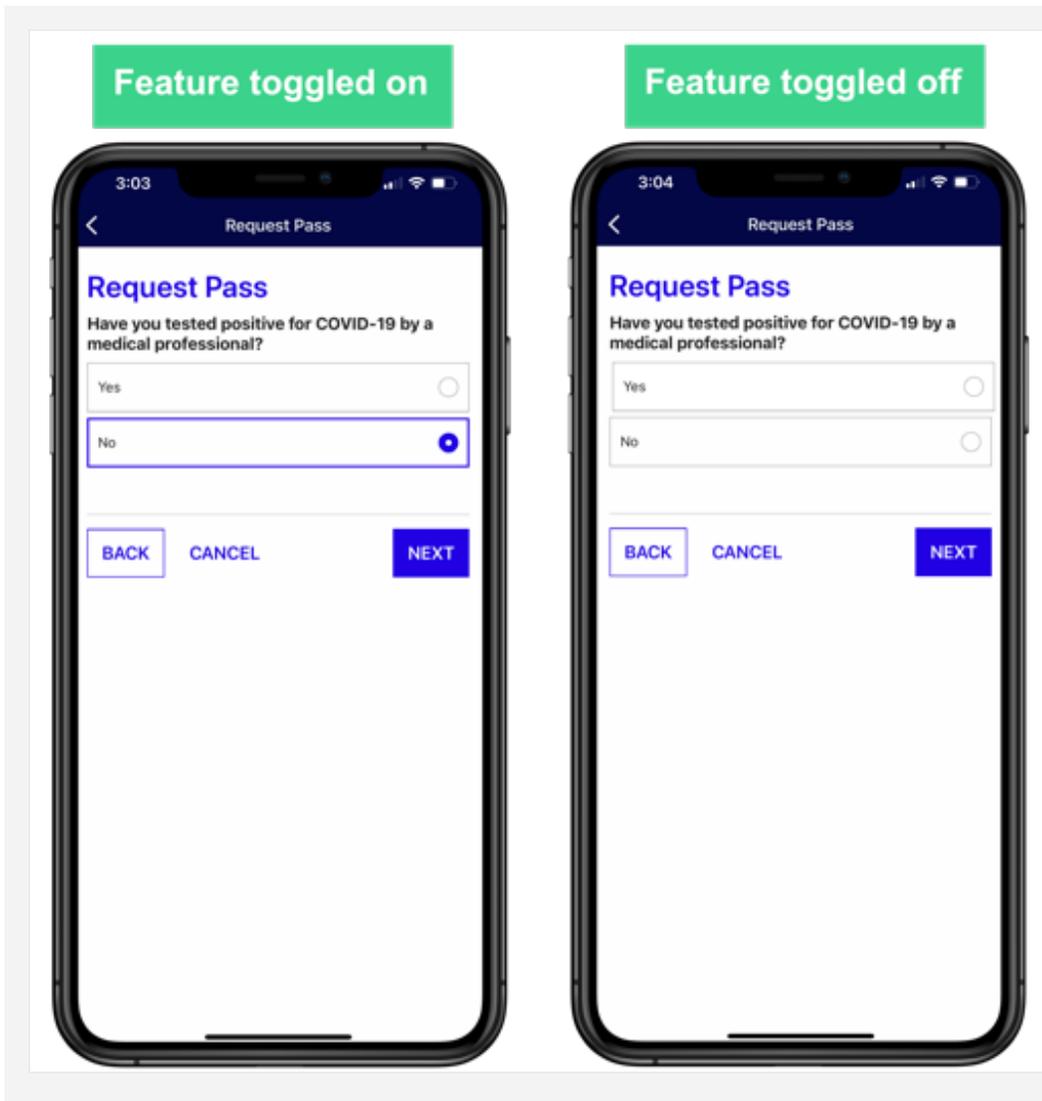
Each time users fill out a questionnaire, you may want them to enter in their pass request answers manually. Another option is to have the user's previous answers populate so that they don't have to select each response again.

Whichever your organizations prefers, you can control this ability with the **Prepopulate Questionnaire Answers** toggle.



When this setting is toggled on, the most recent answers the user submitted for a questionnaire are prepopulated. Users can still update their answer to each question but this workflow saves the user time.

When this setting is toggled off, users will have to submit each of their responses manually whenever they fill out a survey, pass request, or isolation update.

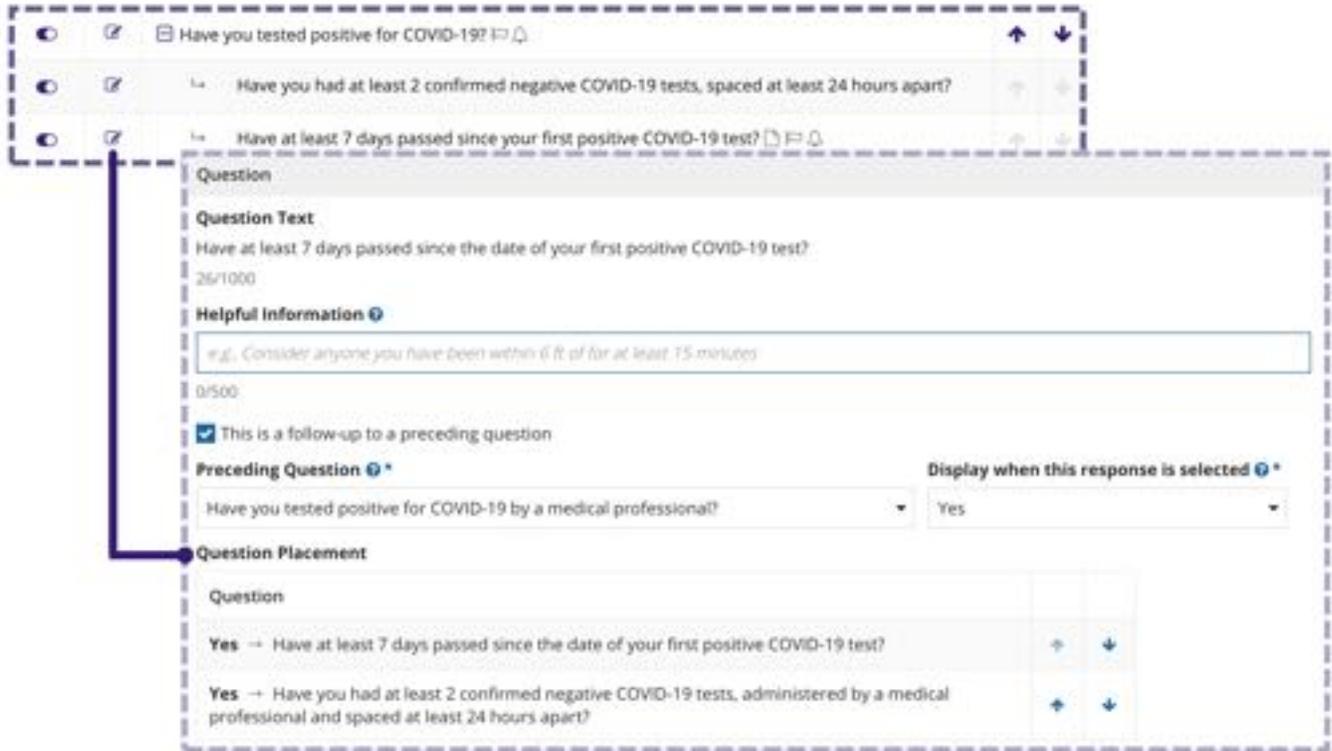


Keep in mind that this can affect the performance of Workforce Safety. If users are experiencing lag times, you may want to consider toggling this feature on.

Question settings

Each question in a configured questionnaire has specific settings that you can configure.

For example, you can reorder questions using the arrows \uparrow \downarrow . To reorder follow-up questions, click the edit icon $\text{\textcircled{e}}$ for the question to edit it.



To access settings for a specific question from the question list, simply select the questionnaire type to open the setting options.

To deactivate a question, simply toggle the active icon \bullet to inactive \circ .

To modify the text for an existing question, simply click the edit icon $\text{\textcircled{e}}$. The Edit Question dialog also allows you to configure the following settings for each question in a pass request, survey, and isolation update:

- **Follow-Up Questions:** Whether the question will appear based on the response to a previous question.
 - **Example:** If a user answers *yes* to *Have you been tested for antibodies?*, you can ask the follow-up question, *Did your antibodies test return positive for COVID-19?*
- **Helpful Information:** Add a tooltip that displays next to questions to clarify a question, define terms, or provide guidance in how to answer a question.
- **Response Type:** Whether the response type is yes/no, single selection, multiple selection, or short answer.
- **Disqualifying Answers:** For pass request and survey questions, whether a certain response to the question will disqualify a user from returning to the workplace.
- **Incident Creation:** Whether a certain response to the question will automatically create an incident.
- **Require a Supporting Document:** Whether a certain response to the question will require the user to upload a supporting document.
 - **Example:** A test result or note from a doctor.
- **COVID-19 Isolation Incident Creation:** For pass request and isolation update questions, whether a certain response to the question indicates that a COVID-19 isolation incident should be created.
- **Guidelines:** Which guidelines to display to the user for each response choice. See [Configure guidelines](#) for more information on adding and deactivating guidelines.
 - **Example:** If the user answers yes to a question about a health issue, you could display a guideline that says *Discuss with your healthcare provider on whether it is suitable for you to return to the workplace at this time.*
- **Visibility:** Whether the question should display only for users at certain facilities, users who have certain positions, or visitors.

If an incident is created when a user fills out a pass request or survey, that incident will be updated each time a user fills out the pass request or survey again.

4. If you would like to include a tooltip for the question, enter the information you would like to display in the **Helpful Information** field.
5. To configure the question to appear based on the response to a previous question:
 - Select **This is a follow-up to a preceding question**.
 - Choose the **Preceding Question**.
 - **Note:** Questions with short answer response types cannot be selected as a preceding question.
 - For **Display when this response is selected**, select the response that will trigger the follow-up question.
6. If there are multiple follow-up questions, you can reorder them using the arrows **↑ ↓**.

Question

Question Text *

Have at least 10 days passed since your onset of symptoms, or if asymptomatic, 14 days since your first positive test?

118/1000

Helpful information ⓘ

If you are asymptomatic, the date that your symptoms started is the date you should start counting from, not the date that you first tested positive.

148/500

This is a follow-up to a preceding question

Preceding Question ⓘ * **Display when this response is selected** ⓘ *

Have you tested positive for COVID-19 by a medical professional? Yes

Question Placement

Question		
Yes → Have at least 10 days passed since your onset of symptoms, or if asymptomatic, 14 days since your first positive test?	↑	↓
Yes → Have you been hospitalized for COVID-19?	↑	↓

7. Choose whether the response type should be **Yes/No**, **Single selection**, **Multiple selection**, or **Short answer**.
8. If you choose single or multiple selection, enter the **Choices**. To add more choices, click **Add Choice**.

Response

Type

Yes/No Single selection Multiple selection Short answer

Choices	Require File Upload	Create Incident
Walk	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input type="checkbox"/>	<input type="checkbox"/>
Bus	<input type="checkbox"/>	<input type="checkbox"/>
Bike	<input type="checkbox"/>	<input type="checkbox"/>

[+ Add Choice](#)

9. For yes/no, single selection, and multiple selection question types, configure the response choices.
 - Choose whether a response choice should require a file upload.
 - Choose whether a response choice should create an incident.
 - For pass request and survey questions, choose whether a response choice should be **Disqualifying**, meaning the user is ineligible to return to their workplace if they select that response.
 - For pass request and isolation update questions, choose whether a response choice should indicate that a COVID-19 isolation incident needs to be created.
 - **Note:** **Create Incident** and **Disqualifying** must be selected for the choice to enable **Indicates COVID-19 Positive**.
 - Choose the **Associated Guidelines** for each response choice.

Pass Request

Response					
Type					
Yes/No					
Choices	Require File Upload <small>?</small>	Create Incident <small>?</small>	Disqualifying <small>?</small>	Indicates User Should Self-isolate <small>?</small>	Associated Guidelines <small>?</small>
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	— Select guidelines —
No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	— Select guidelines —

Survey

Response				
Type				
Yes/No				
Choices	Require File Upload <small>?</small>	Create Incident <small>?</small>	Disqualifying <small>?</small>	Associated Guidelines <small>?</small>
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	— Select guidelines —
No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	— Select guidelines —

Isolation Update

Response				
Type				
Yes/No				
Choices	Require File Upload <small>?</small>	Create Incident <small>?</small>	Indicates User Should Self-isolate <small>?</small>	Associated Guidelines <small>?</small>
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	— Select guidelines —
No	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	— Select guidelines —

10. Under **Visibility**, select if you want the question to only display for **Employees**, **Visitors**, or **Employees and Visitors**. Default is **Employees and Visitors**.
11. If you want the question to display only for users in certain positions, select **Only show this question to certain employee positions**, then select the positions.
12. If you want the question to display only for users in a certain facility, select **Only show this question to users in certain facilities**.
 - Click **ADD COUNTRY**, **ADD STATE/PROVINCE**, **ADD CITY**, or **ADD FACILITY**, then enter the corresponding location. Enter as many locations as you require.

Visibility

User Type

Employees
 Visitors
 Employees and Visitors

Only show this question to certain employee positions

— Select positions —

Facilities

Only show this question for certain facilities

+ ADD COUNTRY

+ ADD STATE/PROVINCE

+ ADD CITY

+ ADD FACILITY

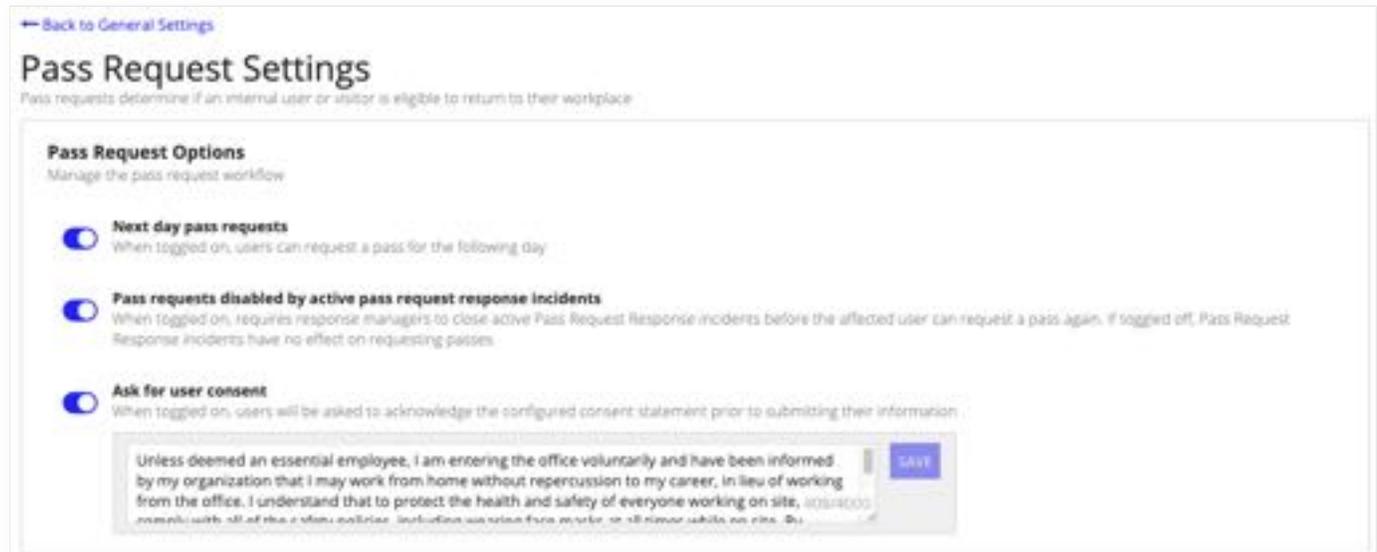
Facility Configurations

Show question to all facilities in	United States	Massachusetts (1 facility)	✕
Show question to all facilities in	New York (1 facility)		✕
Show question to	Denver Office		✕
Show question to all facilities in	United Kingdom (1 facility)		✕

13. Click **SAVE CHANGES**.

Configuring pass request settings

The pass request questionnaire allows you to determine if an internal user or visitor is eligible to return to their workplace. You can manage the pass request workflow from the **Pass Request** box.



Determine which parts of the pass request workflow you want your users to complete by:

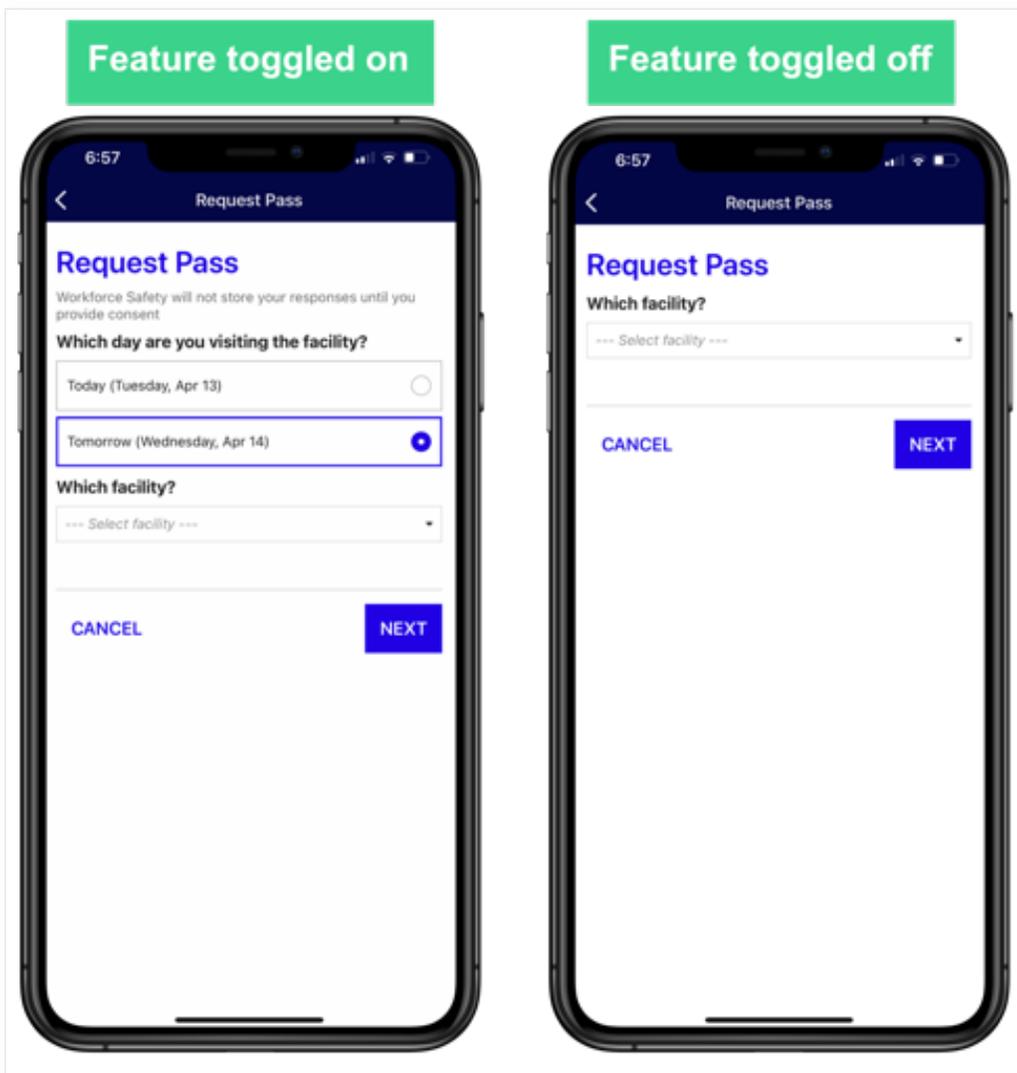
- Toggling pass request options on or off
- Requiring user consent
- Adding new questions
- Editing existing questions
- Activating and deactivating questions

The solution comes with default pass request questions to get you started.

Configuring next day pass requests

This toggle controls whether or not users can request a pass the day before they plan to visit a facility.

When toggled off, users will only be able to request a pass for the current day. Users will only be asked what facility they are requesting a pass for and the pass will automatically be granted for the same day.



Configuring pass requests disabled by active survey response incidents

When survey questions are being configured, certain responses can be configured to automatically create an incident to alert response managers.

When this feature is toggled on, response managers must close incidents that are created from a survey before the affected user can request a pass.

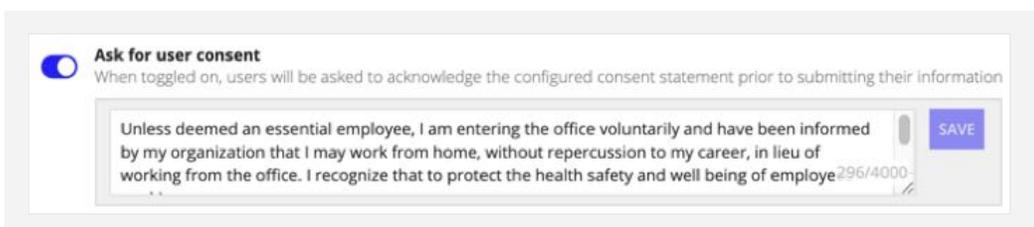
If the survey is [not active](#), this feature toggle does not display.

If toggled off, incidents created from survey responses have no effect on users being able to request a pass.

Requiring user consent

Your organization may have data privacy policies in place to protect your employees. Workforce Safety is now California Consumer Privacy Act (CCPA) compliant. Before collecting any information from your employees to determine if they are eligible to return to a facility, you can require user consent.

From **Pass Request Settings**, you can configure your pass request questionnaire to ask for user consent before users answer any questions. Use the **Ask for user consent** toggle and consent form to easily enable the user consent notice and populate the consent form with text that adheres to your organization's legal and compliance requirements.



To enable user consent:

1. From the **CONFIGURE** page, click **Pass Request** in the **Questionnaire Settings** section.
2. Toggle the **Ask for user consent** on.
3. In the consent form, enter your organization's legal and compliance statement.
4. Click **SAVE**.

When toggled off, user consent is not required and users do not receive a consent notice before answering pass request questions.

Configuring intake surveys

You can configure an intake survey, which is a set of initial questions that are sent to internal users before they are able to start requesting passes, from the **Questionnaire Settings** section. Simply click **Intake Survey** to get started.



Activating and deactivating intake surveys

When you want to gauge employee interest or their ability to return to the workplace, you can activate the intake survey. When you have finished collecting this information, you can deactivate it.

After you activate a survey, users will be required to fill out the survey before they can request a pass.

To activate or deactivate the survey:

1. From the **CONFIGURE** page, click **Intake Survey** in the **Questionnaire Settings** section.
2. At the top of the page, click **ACTIVATE** or **DEACTIVATE**.
 - Make sure you have at least one survey question [added](#).

Configuring isolation updates

If you would like to ask users how they are doing during isolation, you can configure questions for them to answer when in isolation from the **Questionnaire Settings** section.

Activating and deactivating isolation updates

Control when you want to gauge how users are doing in isolation by activating and deactivating the isolation update. After the isolation update is activated, users will be asked to fill out the isolation update from their home page.

To activate or deactivate the isolation update:

1. From the **CONFIGURE** page, click **Isolation Update** in the **Questionnaire Settings** section.
2. At the top of the page, click **ACTIVATE** or **DEACTIVATE**.
 - Make sure you have at least one isolation update question [added](#).

Automatically remove users from isolation

You can also configure isolation updates to automatically remove users from isolation when they meet specific criteria you set. Note that you must select and define at least one criterion to enable this feature.

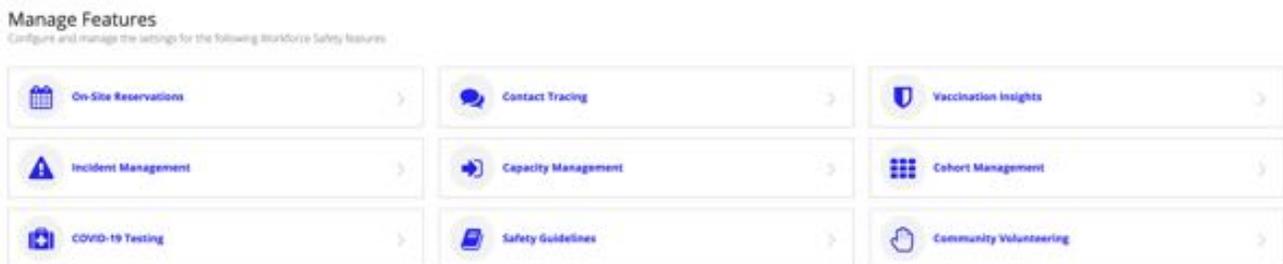
To automate isolation removal:

1. From the **CONFIGURE** page, click **Isolation Update** in the **Questionnaire Settings** section.
2. Select the **Automatically remove a user from isolation when certain criteria are met** check box.
3. Select and define one or both of the criteria listed below that users must meet to in order to be automatically removed from isolation:
 - o Employee must complete a the defined recovery period
 - o Employee must take a COVID-19 test and receive a negative result
4. Click **SAVE SETTINGS**.

Configure Features

Manage site features

From the Manage Features section, you can easily configure and manage the workflows and settings for specific Workforce Safety features to create and report incidents, request specific COVID-19 health information you want your employees to submit, identify who employees came in contact with while on site, and much more.



Response and configuration managers can quickly and easily toggle some features of Workforce Safety on or off.

This section describes the site features that you can configure from the Manage Features section, including:

- [On-Site Reservations](#)
- [Contact Tracing](#)
- [COVID-19 & Vaccination History](#)
- [Incident Management](#)
- [Capacity Management](#)
- [Cohort Management](#)
- [COVID-19 Testing](#)
- [Safety Guidelines](#)
- [Community Volunteering](#)

On-Site Reservations

On-site reservations allow your employees to create reservations to ensure they have a seat in advance of their on-site visit. When this feature is enabled, you'll know which employees to expect at a given facility on any given day, providing you with the information you need to effectively manage your site capacity. This allows you to quickly determine how many resources you'll need at each of your facilities and if you'll need to conduct pre-visit protocols at a specific site.



Response managers also have the ability to create on-site reservations for other users.

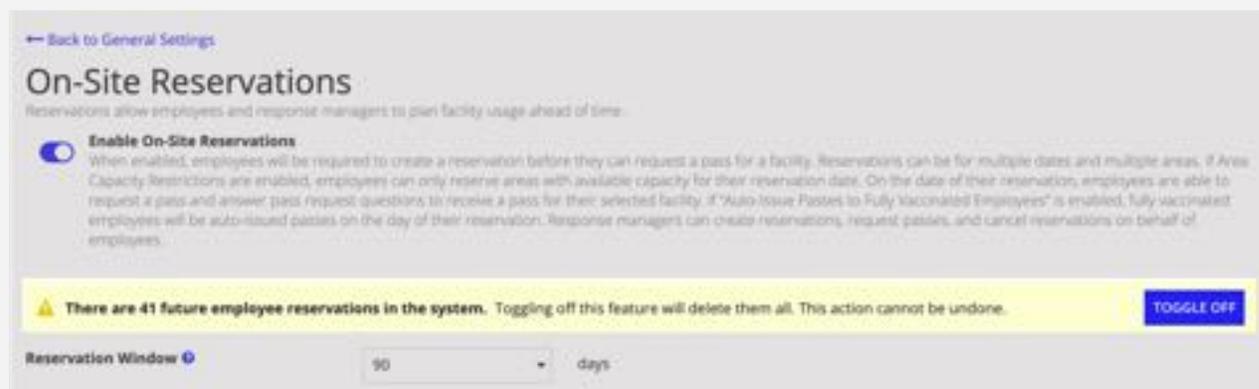
Enable on-site reservations

By default, the **Enable On-Site Reservations** feature is toggled off. When toggled on, users are impacted in the following ways:

- If a user has an active pass, the pass remains active.
- Users must create a reservation before requesting a pass.
- Fully-vaccinated users are auto-issued their pass on the reservation date when the **Skip Pass Request Questions for Fully Vaccinated Employees** toggle is turned on.
- Users can create on-site reservations for any given date or multiple dates, a facility, and an area (if area capacity limits are enabled).
 - **Note:** Existing permissions that apply when requesting a pass also apply when creating a reservation. For example, a user in isolation cannot create a pass request or a reservation.
- Users and response managers can create multiple reservations at one time.
- Users and response managers can cancel an on-site reservation any time before the reservation date.
 - **Note:** Users can only cancel their reservations. They cannot cancel the reservation for another user.

To enable on-site reservations:

1. From the **CONFIGURE** page, click **On-Site Reservations** in the **Manage Features** section.
2. Toggle the **Enable On-Site Reservations** option on.
 - **Note:** When this feature is toggled on, a warning message displays to inform you how many current employees reservations you have in the system and the impact of turning this feature off



Turning the Enable On-Site Reservations toggle off deletes and cancels all active reservations. After a reservation is deleted or canceled, it cannot be retrieve but must be recreated by the user or a response manager.

Configure the reservation window

Control how far in advance your employees or response managers can create a reservation by configuring the **Reservation Window** setting. This setting allows you to quickly and easily define the number of days in advance of an on-site visit you want to allow an employee or response manager to create a reservation.

appian INCIDENTS ACTIVITY PEOPLE REPORTS **CONFIGURE** Response Hub

[← Back to General Settings](#)

On-Site Reservations

Reservations allow employees and response managers to plan facility usage ahead of time.

Enable On-Site Reservations

When enabled, employees will be required to create a reservation before they can request a pass for a facility. Reservations can be for multiple dates and multiple areas. If Area Capacity Restrictions are enabled, employees can only reserve areas with available capacity for their reservation date. On the date of their reservation, employees are able to request a pass and answer pass request questions to receive a pass for their selected facility. If "Auto-Issue Passes to Fully Vaccinated Employees" is enabled, fully vaccinated employees will be auto-issued passes on the day of their reservation. Response managers can create reservations, request passes, and cancel reservations on behalf of employees.

Reservation Window days

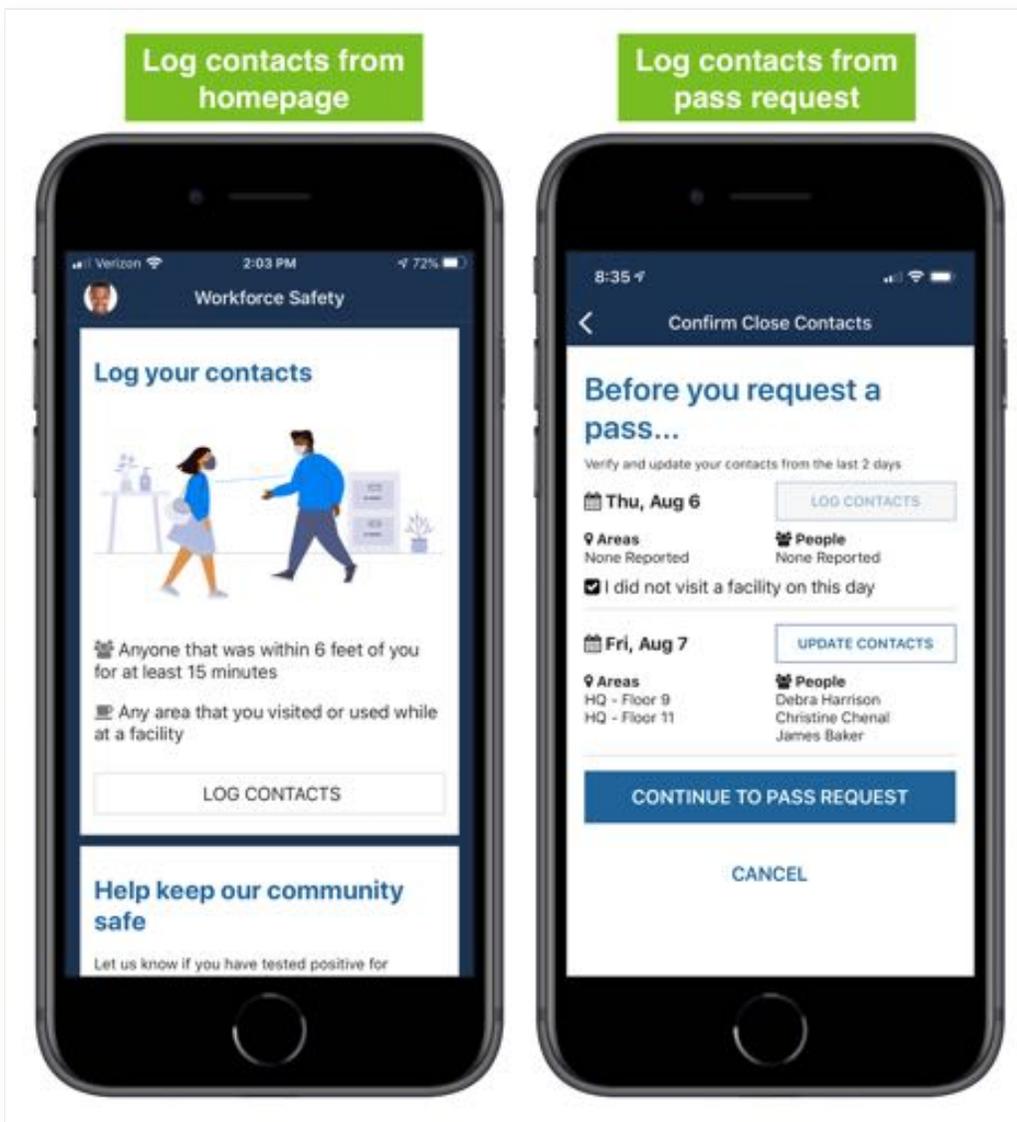
Simply use the Reservation Window drop-down menu to choose a timeframe, between 3-90 days, that defines the number of days your users can create an on-site reservation before their selected reservation date.

Contact tracing

Contact tracing allows your users to log the people and areas that they had contact with on a specific day. From the Manage Features section, you can configure when you want the contact tracing workflow to display for your users.

Contact Reporting When Requesting a Pass

After users have requested a pass at least once, they can log the people and areas they were in contact with during a given day. While users can always log their contacts through the Log your contacts section of the homepage, this feature adds a contact logging step before users can request a pass.



When toggled on, users will be required to review the contacts they have logged for the last two days they visited a facility before completing the pass request questionnaire or log their contacts for those days. Users will log or update logged contacts before completing the pass request questionnaire.

If toggled off, users will not be asked to log their contacts before each pass request. They will still be asked to log their contacts from the homepage.

Contact Reporting on Landing Page

After receiving their first pass, internal users can log the people and areas that they recently had contact with while they were onsite from the solution's landing page.

If toggled off, internal users will not be able to log the people and areas they had contact from the landing page.

COVID-19 & Vaccination History

Understanding how many of your employees have been vaccinated or tested positive for COVID-19 can help you make critical decisions about your pandemic response. The COVID-19 and Vaccination History feature allows you to configure and manage the health information workflow.

← Back to General Settings

COVID-19 & Vaccination History

Use this feature to collect information about your users' COVID-19 health, including vaccination and COVID-19 history. Questions configured below are shown to users in their Profile form. Insights on this data are available in the Reports tab.

Active COVID-19 health information is being collected from users via their Profile form. DISABLE

COVID-19 & Vaccination History Options

Manage the health information request workflow.

- Require Proof of Vaccination Verification**
When toggled on, users who report they are fully vaccinated must provide proof of vaccination. This documentation can then be reviewed by Resource Managers via the Profiles tab. Once verified, users are classified as "Fully Vaccinated (verified)".
- Skip Pass Request Questions for Fully Vaccinated Employees**
When toggled on, fully vaccinated employees can request and receive a pass without answering the configured pass request questions. When toggled off, fully vaccinated employees must answer pass request questions in a qualifying manner to receive a pass. If the "Require Proof of Vaccination Verification" option is enabled, only employees who have been verified as fully vaccinated can skip questions.
- Ask for user consent**
When toggled on, users will be asked to acknowledge the configured consent statement prior to submitting their information.

Unless deemed an essential employee, I am entering the office voluntarily and have been informed by my organization that I may work from home, without repercussion to my career, in lieu of working from the office. I recognize that to protect the health safety and well-being of employees...

COVID-19 & Vaccination History Configuration

Questions configured below are shown to users in their profile form. Insights on this data are available in the Reports tab. To view and configure the prompts that users see to update their COVID-19 history, [click here](#).

Vaccination Questions

Active	Required	Question	Question Shown	Response / Response Type
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Which of the following best describes your COVID-19 vaccination status?	Always	<ul style="list-style-type: none"> Waiting for vaccine and intend to be vaccinated Partially vaccinated and awaiting more doses Fully vaccinated and completed dose series Do not intend to be vaccinated Prefer Not to Answer
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vaccine Name / Manufacturer	When selected vaccination status is: <ul style="list-style-type: none"> Partially vaccinated and awaiting more doses Fully vaccinated and completed dose series 	<ul style="list-style-type: none"> Other COVID-19 Vaccine Do not know / Prefer not to answer Pfizer/BioNTech COVID-19 Vaccine Moderna COVID-19 Vaccine Edit Vaccine Options
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date of Most Recent Dose	When selected vaccination status is: <ul style="list-style-type: none"> Partially vaccinated and awaiting more doses Fully vaccinated and completed dose series 	Date

Activate COVID-19 & Vaccination History

When you enable this feature, COVID-19 health information is collected from the users via their Profile form. You can easily configure, activate, and require health questions, including how many doses a user has received, whether they are partially or fully vaccinated, as well as the date when they received their last dose.

Require vaccination proof

Allow users to upload documentation or take a photo from their mobile device to provide proof of vaccination by toggling on **Require Proof of Vaccination Verification**.

When this feature is toggled on, users who report they are fully vaccinated must provide proof of vaccination. When toggled off, proof of vaccination is not required.

Skipping pass request questions

When toggled on, fully vaccinated employees can request and receive a pass without answering the configured pass request questions. When toggled off, fully vaccinated employees must answer pass request questions in a qualifying manner to receive a pass. If the "Require Proof of Vaccination Verification" option is enabled, only employees who have been verified as fully vaccinated can skip questions.

Configure user consent

The **Ask for user consent** feature allows you to configure whether or not you want to require users to provide consent before they submit their vaccination status or other COVID-19 health information.

Use the form in this section to populate the consent form with a text notice that adheres to your organization's legal and compliance requirements.

When toggled on, users will be asked to acknowledge the configured consent statement prior to submitting their information.

Ask for user consent
When toggled on, users will be asked to acknowledge the configured consent statement prior to submitting their information.

Unless deemed an essential employee, I am entering the office voluntarily and have been informed by my organization that I may work from home without repercussion to my career, in lieu of working from the office. I understand that to protect the health and safety of everyone working on site, 408/4000 comply with all of the safety policies, including wearing face masks at all times while on site. SAVE

When toggled off, users are not required to provide consent.

Configure vaccination and COVID-19 history questions

Configure health-related questions to collect information about your users' vaccination status and COVID-19 health information. Determine which question you want to activate and which questions users are required to answer. Configured and active questions are shown to users in their profile form.

COVID-19 & Vaccination History Configuration					
Questions configured below are shown to users at their profile form. Insights on this data are available in the reports tab. To view and configure the prompts that users see to update their COVID-19 history, click here .					
Vaccination Questions					
Active	Required	Question	Question Shown	Response / Response Type	
<input type="checkbox"/>	<input type="checkbox"/>	Which of the following best describes your COVID-19 vaccination status?	Always	<ul style="list-style-type: none">Waiting for vaccine and intend to be vaccinatedPartially vaccinated and awaiting more dosesFully vaccinated and completed dose seriesDo not intend to be vaccinatedPrefer Not to Answer	
<input type="checkbox"/>	<input type="checkbox"/>	Vaccine Name / Manufacturer	When selected vaccination status is: <ul style="list-style-type: none">Partially vaccinated and awaiting more dosesFully vaccinated and completed dose series	<ul style="list-style-type: none">Other COVID-19 VaccineDo not know / Prefer not to answerPfizer-BioNTech COVID-19 vaccineModerna COVID-19 vaccine	Edit Vaccine Options
<input type="checkbox"/>	<input type="checkbox"/>	Date of Most Recent Dose	When selected vaccination status is: <ul style="list-style-type: none">Partially vaccinated and awaiting more dosesFully vaccinated and completed dose series	Date	
<input type="checkbox"/>	<input type="checkbox"/>	Provide further explanation as to why you do not intend to be vaccinated	When selected vaccination status is: <ul style="list-style-type: none">Do not intend to be vaccinated	Text	
<input type="checkbox"/>	<input type="checkbox"/>	Related documentation	When selected vaccination status is: <ul style="list-style-type: none">Do not intend to be vaccinated	File Upload	
<input type="checkbox"/>	<input type="checkbox"/>	Proof of vaccination	When selected vaccination status is: <ul style="list-style-type: none">Partially vaccinated and awaiting more doses (Optional)Fully vaccinated and completed dose series (Required)	File Upload	
Items					
COVID-19 History Questions					
Active	Required	Question	Question Shown	Response / Response Type	
<input type="checkbox"/>	<input type="checkbox"/>	Have you ever tested positive for COVID-19?	Always	<ul style="list-style-type: none">YesNoPrefer not to answer	
<input type="checkbox"/>	<input type="checkbox"/>	Date of Last Positive Test	When selected COVID-19 history is: <ul style="list-style-type: none">Yes	Date	

Manage incidents

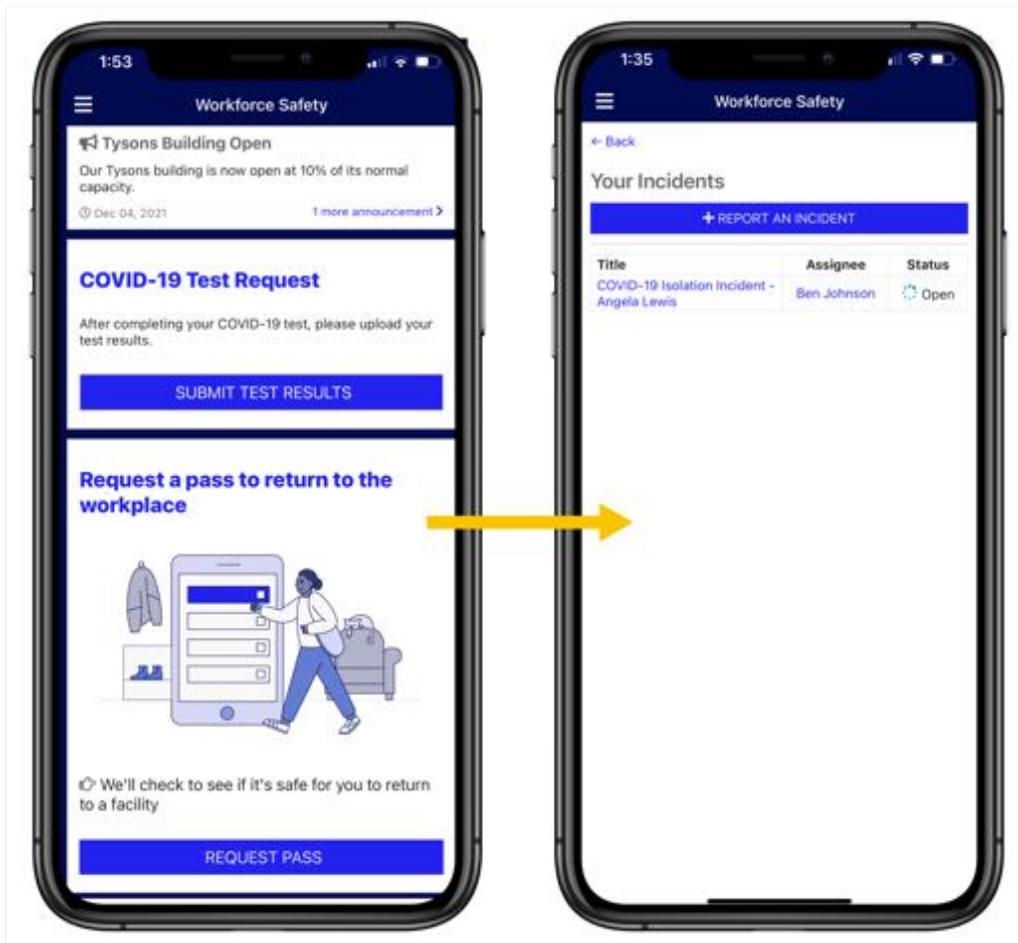
Effectively managing incidents is an important aspect of your COVID-19 response and helping your employees feel safe. Response managers can configure incident settings to help keep track of user activity within your organization.

User Incident Creation

This feature allows users to report an issue to response managers by creating an incident.

The image displays two overlapping forms for creating an incident. The top form is titled "NON-COVID-19 RELATED INCIDENT" and the bottom form is titled "COVID-19 RELATED INCIDENT". Both forms include sections for "Reporter Contact Details", "Incident Details", "Response Manager Details", "Incident Information", and "Attachments". The "COVID-19 RELATED INCIDENT" form also includes a "Testing Information" section with fields for "Confirmed COVID-19 positive through a test?", "Test Date (date conducted)", "Test Location", and "Upload the test result". A "Review" section at the bottom of the COVID-19 form contains a statement and a "Report Incident" button.

If you prefer to turn this feature off, the report incident section will no longer display on the homepage. If the user has reported an incident in the past, they will still see the Incidents icon so they can view their past incidents.



toggling this feature off has no effect on creating incidents based on responses to pass requests, surveys, or isolation updates. Response managers still have the ability to create incidents.

Configure incident options

Response managers can configure the incident management settings needed for their organization, including:

- Giving users the ability to create new incidents
- Requiring consent when a user creates a new incident
- Receiving email notifications when new incidents are created or existing incidents are updated.

[← Back to General Settings](#)

Incident Management Settings

Response managers can create and close incidents to keep track of the user activity in the organization

Incident Management Options

Configure the incident settings needed within your organization

- User incident creation**
When toggled on, allows internal users to create new incidents. If toggled off, response managers can still create new incidents and configure questions to automatically create incidents when a user enters a certain response.
- Email notifications for incident creation**
When toggled on, emails will be sent to all response managers for a creation of any type of incident.
- Email notifications for incident updates**
When toggled on, emails will be sent to all response managers for an update to any type of incident.
- Ask for user consent**
When toggled on, users will be asked to acknowledge the configured consent statement prior to submitting their information

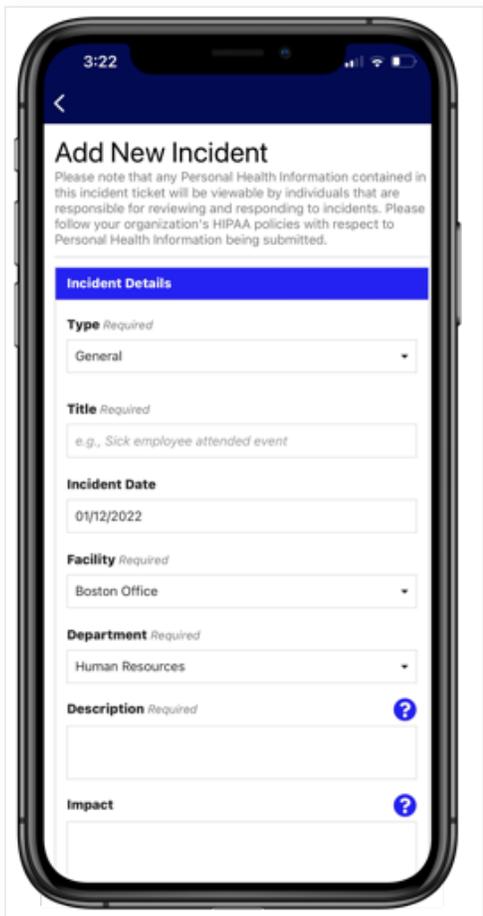
Provide the user consent message

SAVE

Quickly and easily toggle these settings on and off to management how incidents are handled. For example, when the **User incident creation** setting is toggled off, only response managers can create new incidents or trigger the automatic creation of a new incident when a user enters a certain response to a configured questionnaire.

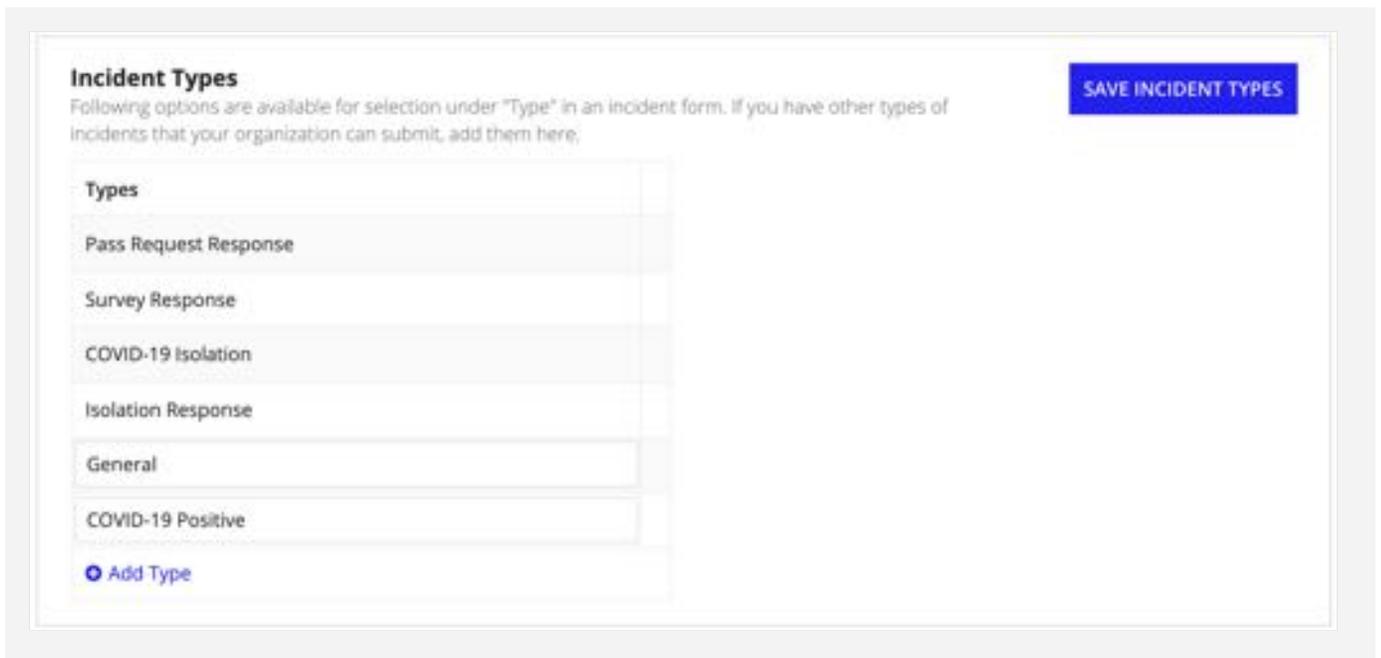
Configure incident types

From the CONFIGURE page, response and configuration managers can add new incident types and rename any incident type they created. This allows users to select a incident type from the configured list when they fill out the incident form, if the **User incident creation** setting is toggled on.



To add a new incident types:

1. From the **CONFIGURE** page, click **Incident Management** in the **Manage Features** section.
2. In the **Incident Types** section, click **Add Type** and enter a name for the new type.
3. Click **SAVE INCIDENT TYPES**.



Note that from the Incident Management Settings page you are able to rename incident types that you created only. To rename an incident type that shipped with the solution, see the [Solution Customization User Guide](#) for Workforce Safety version 13 and later and [Workforce Safety v8.1-v12.x Custom Bundle File Configuration](#) for Workforce Safety version 12x and earlier.

Manage capacity

In order to more easily maintain social distancing in your facilities, you can limit the capacity of each [area that you have configured](#) in Workforce Safety.

Every time a user receives a pass, Workforce Safety keeps track of how many passes have been generated for that area. Once the maximum capacity is reached, users can no longer request a pass for that area.

Capacity Management Settings

Use capacity management to enforce capacity limits on areas within the facilities such as floors or cafeterias.

Enforce Area Capacity Restrictions
When toggled on, internal users will be asked to select an area when requesting a pass. Passes can only be requested for areas that haven't reached capacity for the given day.

On

For all areas in a closed facility, please update the status to closed.

Areas
Use areas to break your facilities into smaller components like floors and cafeterias. Configure areas for all facilities to ensure users will be able to request passes from them. Passes cannot be requested for closed areas.

[SAVE AREAS](#)

Show only active areas

Active	Area Name	Area Status:	Facility	Facility Status	Daily Capacity
<input checked="" type="checkbox"/>	Main Lobby - Floor 1	20/100 <input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Applan HQ	<input checked="" type="checkbox"/> Open	100
<input checked="" type="checkbox"/>	Main Reception - Floor 11	25/100 <input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Applan HQ	<input checked="" type="checkbox"/> Open	100
<input checked="" type="checkbox"/>	Sales - Floor 10	16/100 <input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Applan HQ	<input checked="" type="checkbox"/> Open	50
<input checked="" type="checkbox"/>	Marketing - Floor 11	22/100 <input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Applan HQ	<input checked="" type="checkbox"/> Open	40
<input checked="" type="checkbox"/>	HR & Support - Floor 9	22/100 <input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	New York Office	<input checked="" type="checkbox"/> Closed	10
<input checked="" type="checkbox"/>	Customer Success - Floor 8	25/100 <input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	New York Office	<input checked="" type="checkbox"/> Closed	100
<input checked="" type="checkbox"/>	Customer Success - Floor 7	25/100 <input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Boston Office	<input checked="" type="checkbox"/> Closed	100
<input checked="" type="checkbox"/>	Engineering - Floor 6	21/100 <input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Boston Office	<input checked="" type="checkbox"/> Closed	100

If it is necessary to override the capacity limit, response managers and screeners can request a pass on behalf of a user and choose to override the limit.

Selected area is full

First Floor is full on 9/16/2020 . Please search for an area at EMEA HQ, or continue to request a pass for First Floor and override its capacity.

Override capacity limit for First Floor

Select an Area

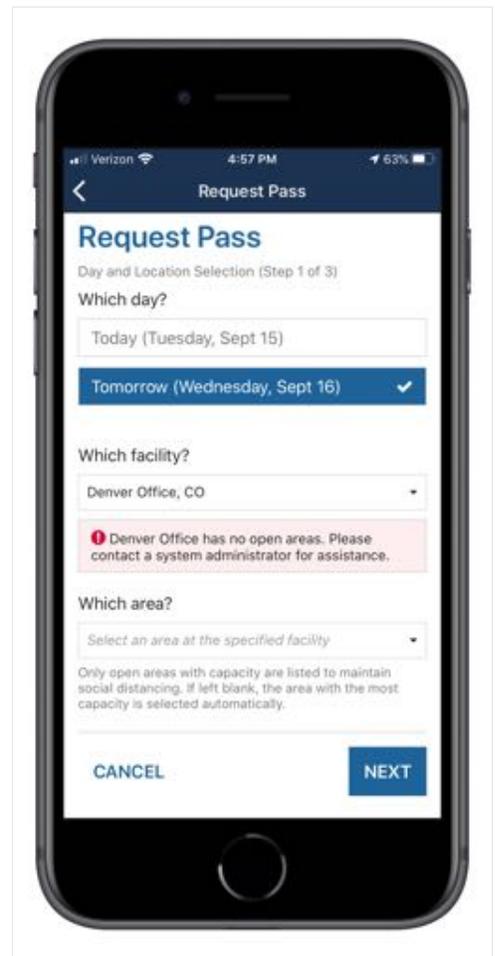
[CANCEL](#) [REQUEST PASS](#)

Enforce Area Capacity Restrictions

When this feature is toggled on, users will be asked to select an open area when they request a pass. If they don't choose an area, the area with the most capacity will be selected for them.

It is very important to configure at least one area for each facility before toggling on this feature. Users can't request a pass for facilities that don't have any areas configured.

If areas are not configured for a facility, they will not be able to request a pass for that facility.



Manage cohorts

Cohorting is identifying groups (cohorts) and keeping them together to limit contact between members of each group. This can help limit the spread of COVID-19 to people outside of a cohort.

In Workforce Safety, you assign departments to cohorts, then assign days of the week to each cohort. Users can only request a pass for days that are assigned to their cohort.

When **Cohort Management** is toggled on, you can manage cohorts by assigning departments to cohorts and assigning days of the week to each cohort.

If you don't modify the default cohort, all users will see a message on their homepage that says "Due to departmental capacity restrictions, you can only request passes for Sunday, Monday, Tuesday, Wednesday, Thursday, Friday and Saturday."

Manage Cohorts

Use this form to manage your organisation's cohorts. Cohorts are small groups that are kept together to reduce transmission of COVID-19. Users will only be able to receive a pass for specific days of the week depending on their department's cohort.

+ ADD OR EDIT COHORTS

Default Cohort

All Departments

SCHEDULE

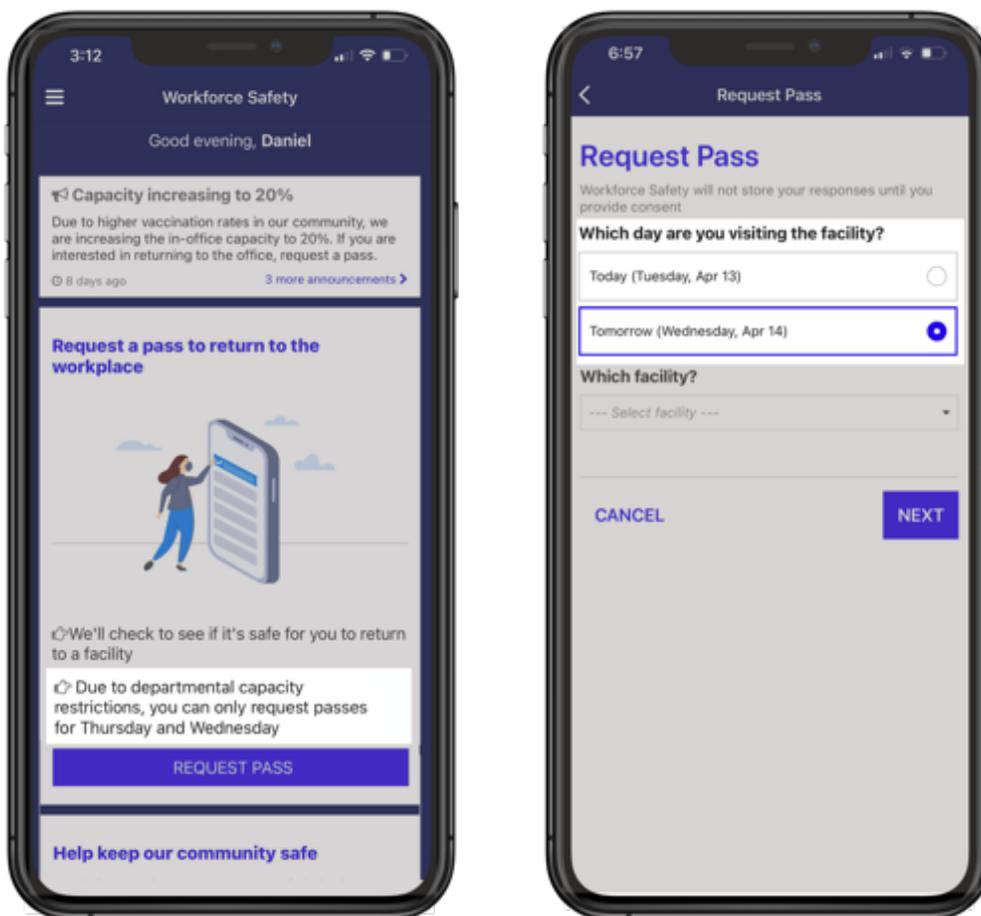
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
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DEPARTMENTS

Finance, Human Resources, Information Technology, Marketing, and Operations

When a user requests a pass, Workforce Safety checks which cohort the user is in, based on the department in their [profile](#).

The Request Pass section on their homepage will let them know which days of the week their department can request a pass for. When they request a pass, they will only be able to select days that are assigned to their cohort.



If you toggle off **Cohort Management** after modifying cohorts, you will lose all modifications.

Restrictions when creating cohorts

The following are some restrictions to keep in mind when you are adding or editing cohorts:

- Each cohort can have zero or many departments.

- Each cohort must have at least one day selected.
- Each department must be associated to a cohort.
- Each department can only be associated to one cohort.

Default cohort

After Cohort Management is toggled on, a default "All Department" cohort is created. All departments are added to this cohort and all days of the week are selected for it. You can modify this cohort and create new cohorts by [managing cohorts](#).

Add or Edit Cohorts

Cohorts limit who can request a pass for each day by allowing users in certain departments to only request passes for certain days. To create a cohort: 1) Name the cohort. 2) Choose the departments that will make up the cohort. 3) Choose the days that users in the cohort can request a pass for. Each department must be assigned to one and only one cohort.

Default Cohort

Cohort Name	Departments	Schedule
All Departments	Human Resources, Finance, Marketing, Oper	Sunday, Monday, Tuesday, Wednesday, Thurs

Because each department can only be in one cohort, before you add any new cohorts you have to remove departments from this cohort. We also suggest renaming it from "All Departments."

Enabling cohort management

To enable cohorts:

1. Make sure all of your [departments are configured](#).
2. From the **CONFIGURE** page, click **Cohort Management** in the **Manage Features** section.
3. Click **ADD OR EDIT COHORTS**.
4. If the cohorts have not been changed since Cohort Management was toggled on, modify the default All Department cohort.
 - Remove **Departments** that you would like to put into different cohorts.
 - Edit the **Cohort Name** to match the selected departments. Adding (Default) to the name can help you identify this as the default cohort later. This is important if you [add any new departments](#).
 - For **Schedule**, choose the days of the week that users in this cohort can request a pass.
5. To add a new cohort, click **Add Cohort**.
 - Edit the **Cohort Name**. The name must be unique.
 - Select the **Departments** to add to the cohort.
 - For **Schedule**, choose the days of the week that users in this cohort can request a pass.
6. After you have added each department to a cohort, click **SAVE CHANGES**.
 - **Note:** After you click **Save Changes**, you cannot delete the cohorts you added.

Add or Edit Cohorts

Cohorts limit who can request a pass for each day by allowing users in certain departments to only request passes for certain days. To create a cohort: 1) Name the cohort. 2) Choose the departments that will make up the cohort. 3) Choose the days that users in the cohort can request a pass for. Each department must be assigned to one and only one cohort.

Cohort Name	Departments	Schedule
HR/Finance (Default)	Human Resources, Finance	Monday, Tuesday

Cohort Name	Departments	Schedule
Marketing/Ops	Marketing, Operations	Wednesday, Thursday, Friday

Cohort Name	Departments	Schedule
IT	Information Technology	Monday, Tuesday, Wednesday, Thursday

[Add Cohort](#)

CANCEL

SAVE CHANGES

The configured cohorts display on the Manage Cohorts screen.

HR/Finance

 SCHEDULE

Sunday ✕	Monday ✔	Tuesday ✔	Wednesday ✕	Thursday ✕	Friday ✕	Saturday ✕
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 DEPARTMENTS

Finance, and Human Resources

IT

 SCHEDULE

Sunday ✕	Monday ✔	Tuesday ✔	Wednesday ✔	Thursday ✔	Friday ✔	Saturday ✕
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 DEPARTMENTS

Information Technology

Marketing/Ops

 SCHEDULE

Sunday ✕	Monday ✕	Tuesday ✕	Wednesday ✔	Thursday ✔	Friday ✔	Saturday ✕
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 DEPARTMENTS

Marketing, and Operations

COVID-19 Testing

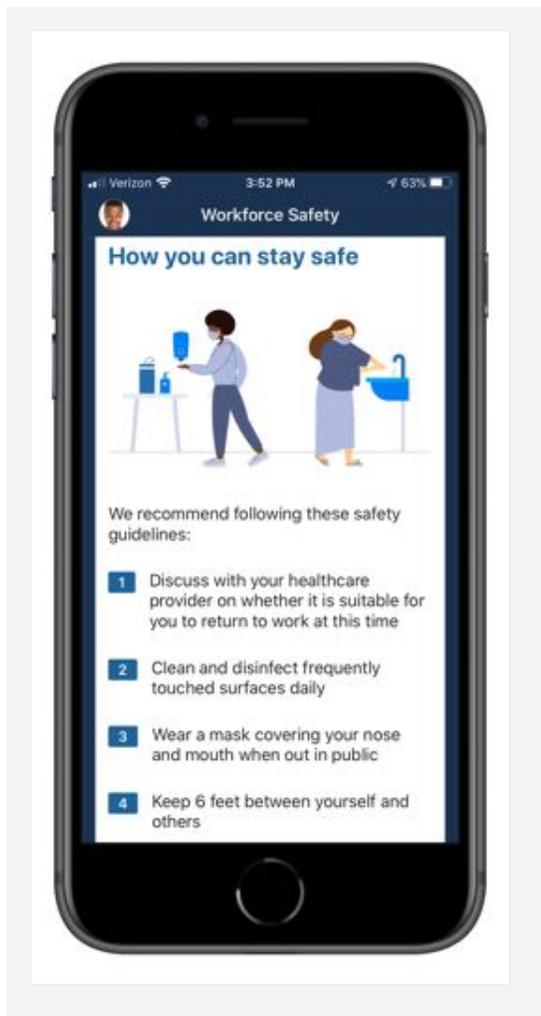
The COVID-19 testing workflow allows you to manage the user messages displayed during the COVID-19 test results collection process for your employees. Easily require users to provide consent by toggling on the **Ask for user consent** option and tailor the consent message users see so that it fits your organization's policies and procedures. You can also manually edit the default message users see when a new test result is requested.

Configure safety guidelines

When you are configuring the questionnaire questions, for each question response you can select guidelines to display to the end user based on their response.

Response					
Type					
<input checked="" type="radio"/> Yes/No <input type="radio"/> Multiple choice <input type="radio"/> Short answer					
Choices	Require File Upload	Create Incident	Disqualifying	Indicates COVID-19 Positive	Associated Guidelines
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="border: 1px solid #ccc; padding: 2px;"> -- Select guideline -- <ul style="list-style-type: none"> ✓ Avoid touching your eyes, nose, and mouth ✓ Avoid close contact with people who are sick ✓ Keep 6 feet between yourself and others ✓ Wear a mask covering your nose and mouth when out in public ✓ Clean and disinfect frequently touched surfaces daily ✓ Discuss with your healthcare provider on whether it is suitable for you to return to work at this time ✓ Seek medical attention after 4 days of the same symptoms </div>
No	<input type="checkbox"/>	<input type="checkbox"/>			

After a user requests a pass, a **How you can stay safe** section displays on the homepage that shows them guidelines they should follow during the crisis. Workforce Safety comes with some guidelines out of the box, but response and configuration managers can update these guidelines by adding new ones and deactivating old ones.



To manage guidelines:

1. Click **GUIDELINES**.
2. Click **Add a Guideline** and enter a guideline.
3. To deactivate a guideline, toggle the active icon to inactive .

Manage Guidelines

Use this form to manage the guidelines that your organization uses in its questionnaire.

These are the guidelines available for selection when offering advice after a user finishes their questionnaire.

Guidelines	Active
Wash your hands often with soap and water for at least 20 seconds	<input type="checkbox"/>
Avoid touching your eyes, nose, and mouth	<input type="checkbox"/>
Avoid close contact with people who are sick	<input type="checkbox"/>
Keep 6 feet between yourself and others	<input type="checkbox"/>
Wear a mask covering your nose and mouth when out in public	<input type="checkbox"/>
Clean and disinfect frequently touched surfaces daily	<input type="checkbox"/>
Discuss with your healthcare provider on whether it is suitable for you to return to work at this time	<input type="checkbox"/>
+ Add a Guideline	

CANCEL

SAVE CHANGES

Community Volunteering and Help Requests

The community volunteering and help requests feature helps strengthen workplace communities in a time of need with peer-to-peer support. Easily match volunteers with workplace community members in need of assistance.

This feature allows users to make a request for help or sign up to volunteer to fulfill these help requests.



Need a helping hand?

Short on groceries? Just need some advice via video chat? Your colleagues are available to assist!

MAKE A REQUEST



Want to volunteer?

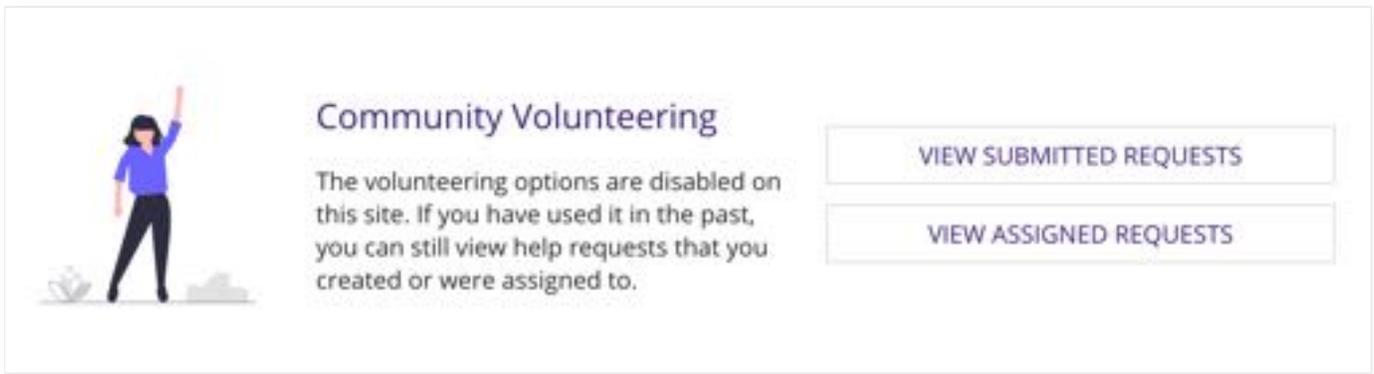
Sign up to help your co-workers during these challenging times. You can help in-person or remotely!

SIGN UP

What does toggling it on do?

This feature is turned off by default. If you prefer to turn it on, users will see a **Community Help** icon on the bottom of their homepage. When they click it, they will be able to submit a help request or sign up to volunteer.

If you have used this feature in the past and decide to turn it off, users who have created help requests or signed up to volunteer will still see the **Community Help** icon. When they click it, they will be able to view their submitted or assigned requests.



Community Volunteering

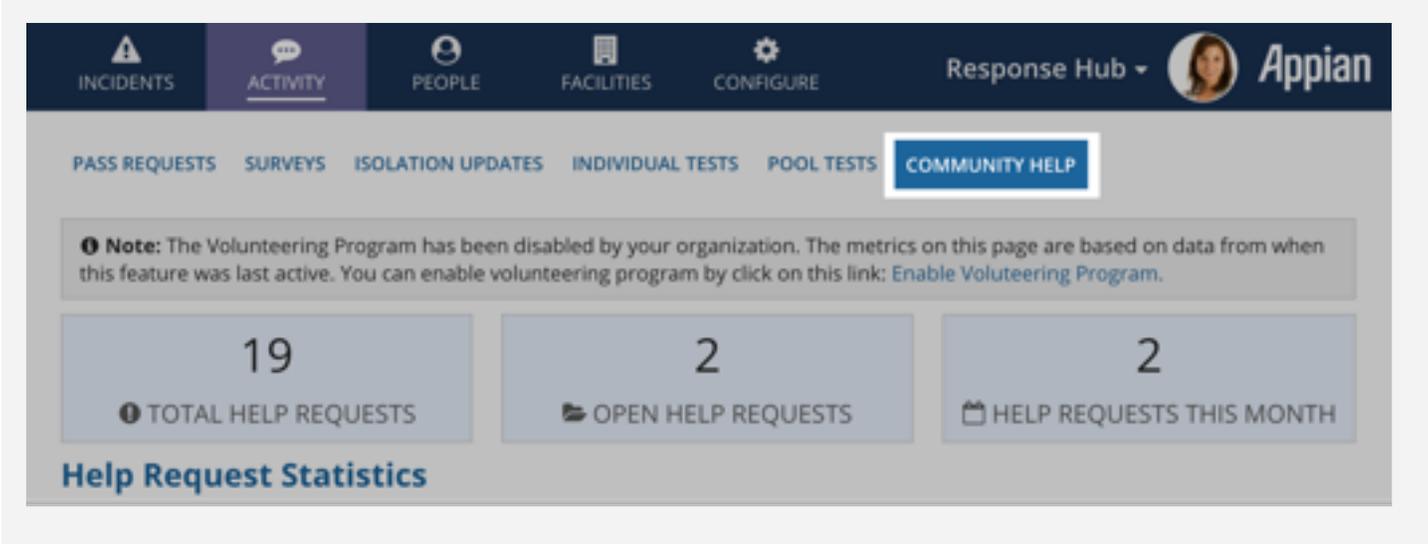
The volunteering options are disabled on this site. If you have used it in the past, you can still view help requests that you created or were assigned to.

[VIEW SUBMITTED REQUESTS](#)

[VIEW ASSIGNED REQUESTS](#)

The banner features an illustration of a woman in a blue shirt and black pants, standing with one arm raised. The text is in a clean, sans-serif font. Two buttons are positioned to the right of the text.

Additionally, in the **Response Hub**, past help requests and volunteer information will still be visible in the **COMMUNITY HELP** tab.



INCIDENTS ACTIVITY PEOPLE FACILITIES CONFIGURE Response Hub Appian

PASS REQUESTS SURVEYS ISOLATION UPDATES INDIVIDUAL TESTS POOL TESTS **COMMUNITY HELP**

Note: The Volunteering Program has been disabled by your organization. The metrics on this page are based on data from when this feature was last active. You can enable volunteering program by click on this link: [Enable Volunteering Program](#).

19 TOTAL HELP REQUESTS

2 OPEN HELP REQUESTS

2 HELP REQUESTS THIS MONTH

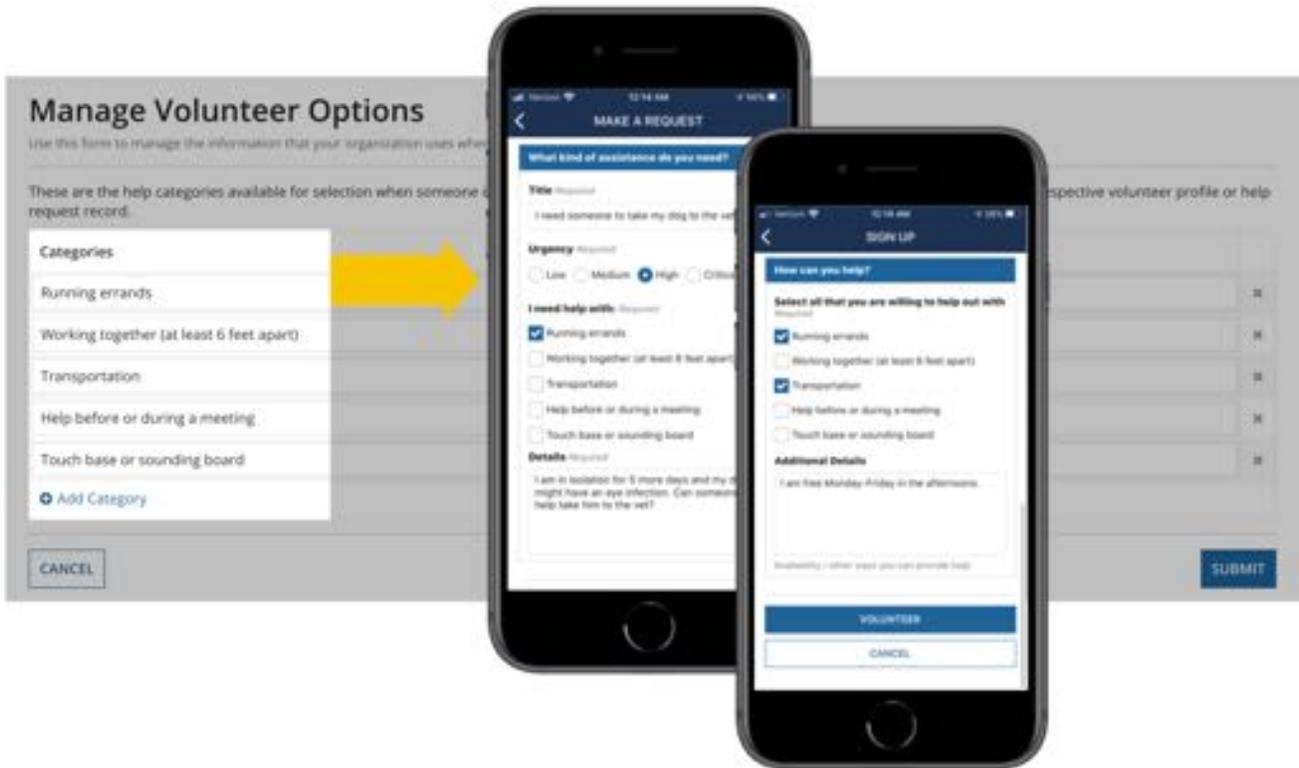
Help Request Statistics

The screenshot shows a navigation bar with icons for Incidents, Activity, People, Facilities, and Configure. The 'Response Hub' section includes a user profile and the Appian logo. Below the navigation, a menu contains 'PASS REQUESTS', 'SURVEYS', 'ISOLATION UPDATES', 'INDIVIDUAL TESTS', 'POOL TESTS', and 'COMMUNITY HELP' (highlighted). A note explains that the volunteering program is disabled. Three statistics cards show 19 total help requests, 2 open help requests, and 2 help requests this month. The section is titled 'Help Request Statistics'.

Configure volunteer options

Response managers, coordinators, and configuration managers can manage the volunteer categories.

Volunteer categories are used in help requests and volunteer forms. When users request help, they can select from these categories to indicate what they need help with. Volunteers can select from these categories to indicate how they can help. The solution automatically includes some default volunteer categories to get you started.



After a volunteer category is added, it can't be deleted, but it can be renamed. This is also true for the default volunteer categories.

To update or add volunteer categories:

1. Click **VOLUNTEER OPTIONS**.
2. If necessary, rename the existing **Categories**.
3. To add a new category, click **Add Category** and enter a new category.

Configure User Communication and Resources

Configure announcements

You may want to create target announcements and send them to specific users? Or schedule an announcement that you want to post at a future date and time? Workforce Safety allows you to send an announcement to all users or send an announcement to specific departments and facilities only using the Announcements feature in the Employee Communication and Resources section. The solution also allows you to configure scheduled announcements and view a list of all of your current, scheduled, and archived announcements.

appian INCIDENTS ACTIVITY PEOPLE REPORTS CONFIGURE Response Hub

← Back to General Settings

Configure Announcements

You may configure announcements to display to internal users. The most recent announcement will be at the top of a user's landing page with an option to view all current announcements.

New Announcement

Title *
 HQ Capacity Issues

Message *
 The capacity limit for HQ has been increased to 20%. Those who are interested in returning to the office can request a pass for their assigned floor. Contact facilities@hq.com for more information.

Send Email Notification? * Yes No **Send Push Notification? *** Yes No

Send To *
 All users Selected departments and facilities only
 Schedule for a future time

RESET **POST ANNOUNCEMENT**

Announcements

CURRENT SCHEDULED ARCHIVED

Title	Message	Department Visibility	Facility Visibility	Email Notification	Push Notification	Posted On	Created On	
Capacity increasing to 20%	Due to higher vaccination rates in our community, we are increasing the in-office capacity to 20%. If you are interested in returning to the office, request a pass.	Finance, Information Technology	All Facilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Apr 08, 2021 2:31 PM	Apr 08, 2021 2:31 PM	ARCHIVE
Office Deep Cleaning Next Monday	The office is undergoing a deep cleaning to ensure a safe working environment. Please work from home next Monday.	All Departments	Denver Office	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Apr 08, 2021 2:31 PM	Apr 08, 2021 2:31 PM	ARCHIVE
North Side Cafeteria Open	The North Side Cafeteria in Reslin building is now open at 50% of its normal capacity.	All Departments	All Facilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Apr 08, 2021 2:31 PM	Apr 08, 2021 2:31 PM	ARCHIVE

There's no limit, you can create as many announcements as you need.

Create an announcement for specific users

If you choose to send an announcement to users in a specific department or facility, you can select one or multiple departments, facilities, or both for the target the announcement. Users in the selected groups are the only ones who will receive email and push notifications for the announcement. They are also the only ones who can view the announcement on their landing page.

← Back to General Settings

Configure Announcements

You may configure announcements to display to internal users. The most recent announcement will be at the top of a user's landing page with an option to view all current announcements.

New Announcement

Title *
 HQ Capacity Issues

Message *
 The capacity limit for HQ has been increased to 20%. Those who are interested in returning to the office can request a pass for their assigned floor. Contact facilities@hq.com for more information.

Send Email Notification? * Yes No **Send Push Notification? *** Yes No

Send To *
 All users Selected departments and facilities only

Department Visibility
 Finance, Marketing, Operations

Facility Visibility
 HQ

Schedule for a future time

RESET **POST ANNOUNCEMENT**

To configure an announcement for specific users:

1. From the **CONFIGURE** page, click **GENERAL SETTINGS** and scroll down to the **Employee Communication and Resources** section.
2. Click **Announcements**.
3. In **Title**, enter a title for your announcement.
4. In **Message**, enter the announcement you want to send to your internal users. Note that the maximum character count is 500.
5. Configure the announcement to send an email notification, push notification, or both.
6. Select **Selected departments and facilities only** to send the announcement to a specific group of users.
7. Click **POST ANNOUNCEMENT**.

Create a scheduled announcement

To schedule an announcement for a date and time in the future, simply check the **Schedule for a future time** checkbox when configuring your announcement. Select the date and time for your scheduled announcement using the **Scheduled Date & Time** picker.

The screenshot shows the 'Configure Announcements' page with a 'New Announcement' form. The form includes the following fields and options:

- Title ***: HQ Capacity Issues (18/100)
- Message ***: The capacity limit for HQ has been increased to 20%. Those who are interested in returning to the office can request a pass for their assigned floor. Contact facilities@hq.com for more information. (137/500)
- Send Email Notification? ***: Yes No
- Send Push Notification? ***: Yes No
- Send To ***: All users Selected departments and facilities only
- Department Visibility**: Finance, Marketing, Operations
- Facility Visibility**: Applan HQ
- Schedule for a future time**:
- Scheduled Date & Time ***: 05/31/2021 8:00 AM

Buttons: RESET, POST ANNOUNCEMENT

Note that all announcements are sent at the same time to your selected audience. For example, if a response manager in Chicago scheduled an announcement for 9 AM (CST), an employee in New York would see the announcement displayed on their landing page at 10 AM (EST).

If you configured your announcement with email or push notifications, they will also be sent at the scheduled time.

View announcements

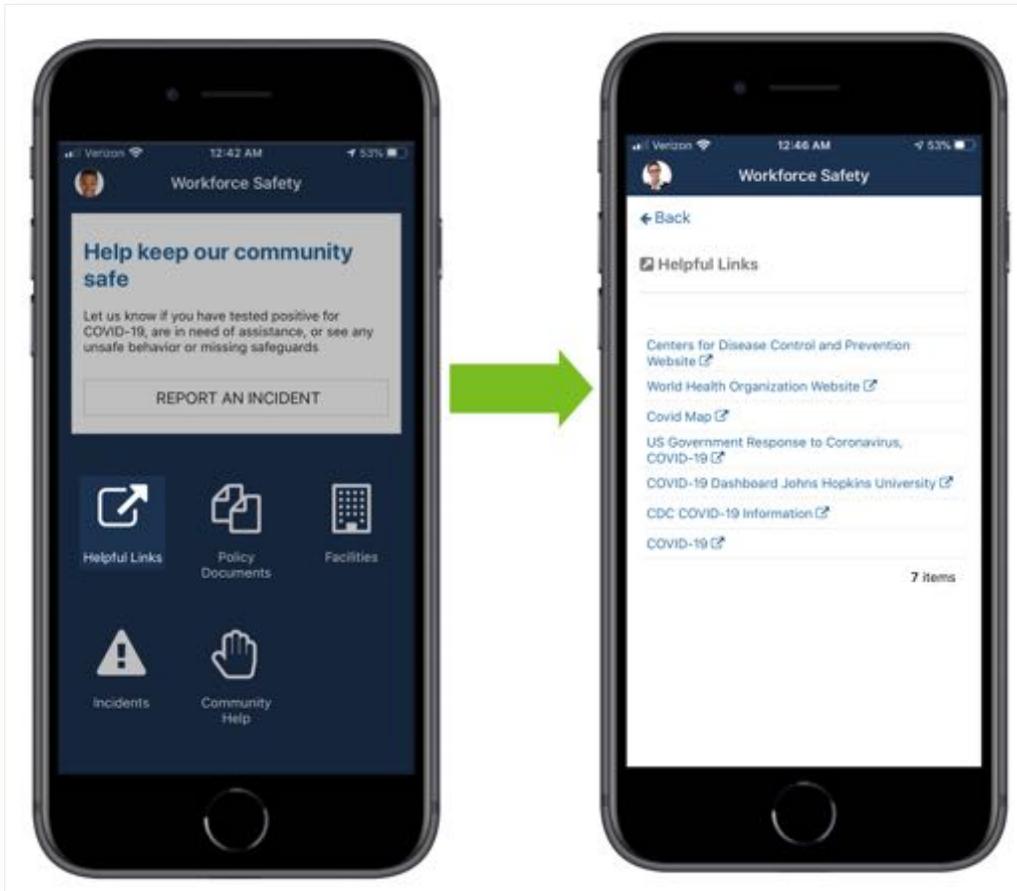
Need to review your current or archive announcements, or review or cancel a scheduled announcement? You can view all announcements in the Announcements grid.

From the Announcement grid, you can select the **CURRENT** tab to view all of your announcements that have already posted. Need to archive an announcement? Locate the announcement you want to archive and simply click **ARCHIVE** at the end of the row. Click the **ARCHIVED** tab to view all of your archived announcements.

If you made a mistake when creating a scheduled announcement or no longer want to post an upcoming announcement, select **SCHEDULED** to view a list of your upcoming announcements and click **CANCEL** to delete the scheduled announcement.

Configure helpful links

During a crisis, information is constantly changing. That is why Workforce Safety allows response and configuration managers to share helpful links with users. These links are accessed on the Workforce Safety site by clicking **Helpful Links**.



To update helpful links:

1. Click **HELPFUL LINKS**.
2. To add a link, click **Add Link** and add a **Description** and **Link**.
 - **Note:** The description will be used as the display text for the link.
3. If necessary, update the **Description** or **Link** for existing links.
4. To delete a link, click the red **x**.
5. Click **SAVE LINKS**.
6. To preview how the links will display, click **Preview Links**.

Update Helpful Links

Update and add any new helpful links here. Please verify that all links begin with https:// or http://

Description ?	Link	
Centers for Disease Control and Prevention Website	https://www.cdc.gov/coronavirus/2019-nCoV/index.ht	✗
World Health Organization Website	https://www.who.int/emergencies/diseases/novel-con	✗
+ Add Link		

Preview of Helpful Links:

Centers for Disease Control and Prevention Website [↗](#)

World Health Organization Website [↗](#)

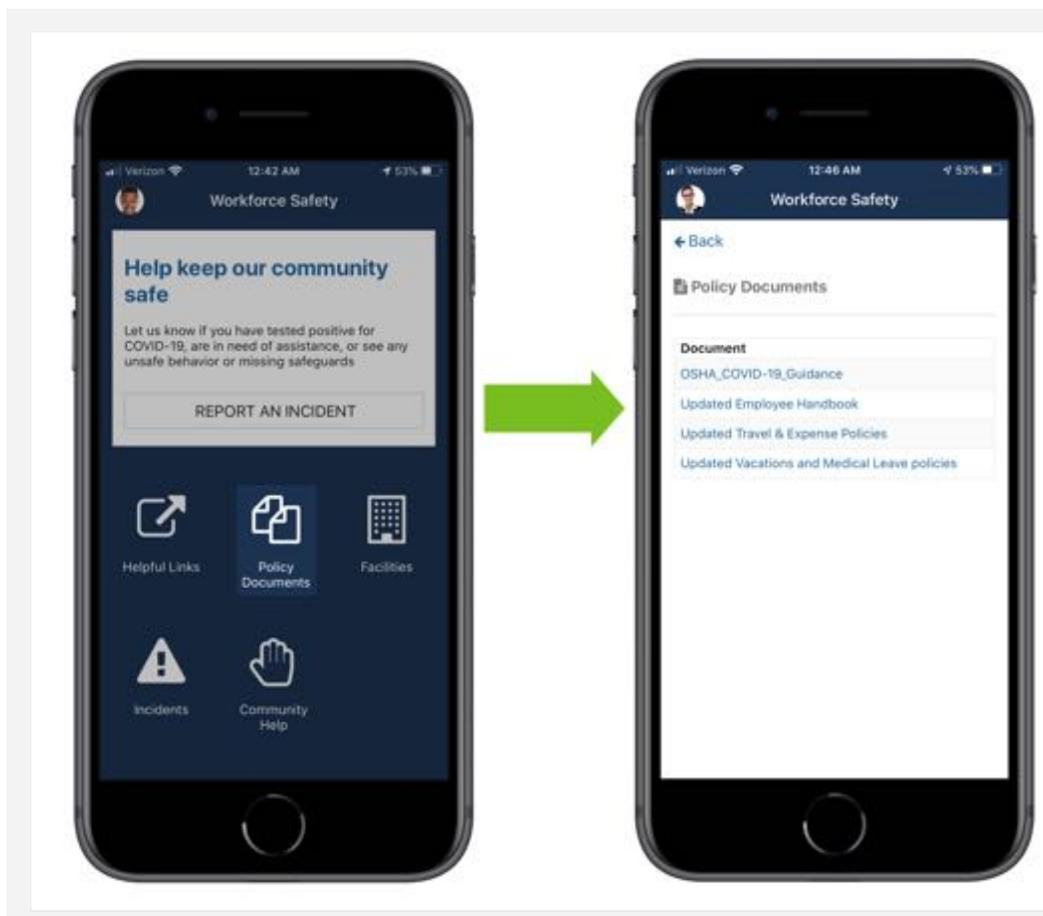
CANCEL

PREVIEW LINKS

SAVE LINKS

Configure policy documents

A crisis situation may lead to rapid changes in policies. Response and configuration managers can ensure that their users have access to the latest policies in one place using the **Policy Documents** link on the Workforce Safety site.



To update policy documents:

1. Click **POLICY DOCUMENTS**.
2. To add a new document, click **Attach New File**.
3. Click **UPLOAD** and choose a document.
4. To archive a document so that it no longer displays to users, click the archive icon .

Update Policy Documents

Add new policy documents here. Any 'Active Documents' that are deleted will be moved to 'Archived Documents' after submission

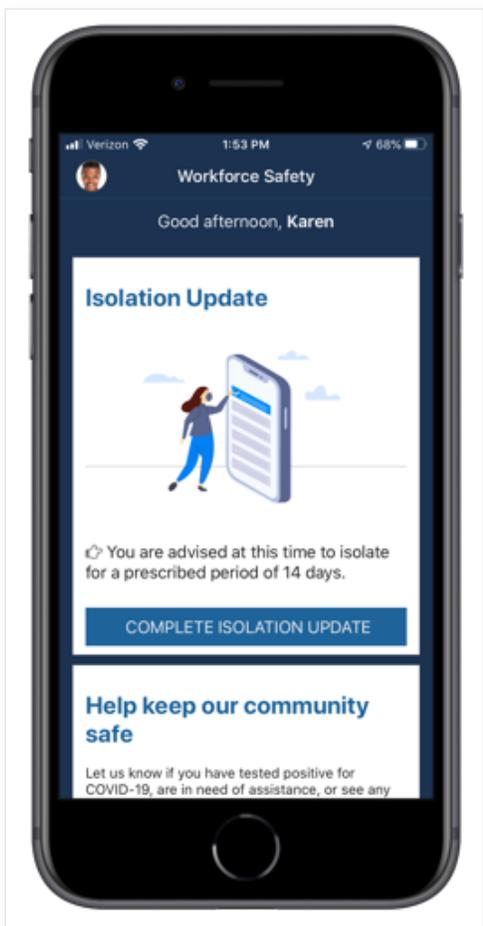
Appian_COVID-19_Policy.pdf	
OSHA_COVID-19_Guidance.pdf	
Attach New File	

Modifying default messages

Workforce Safety gives you the ability to modify several messages users will see. These include the message that displays to users after they are put into the Isolation status and the default message that is sent to users when response managers request a new test.

Modifying the default isolation update prompt

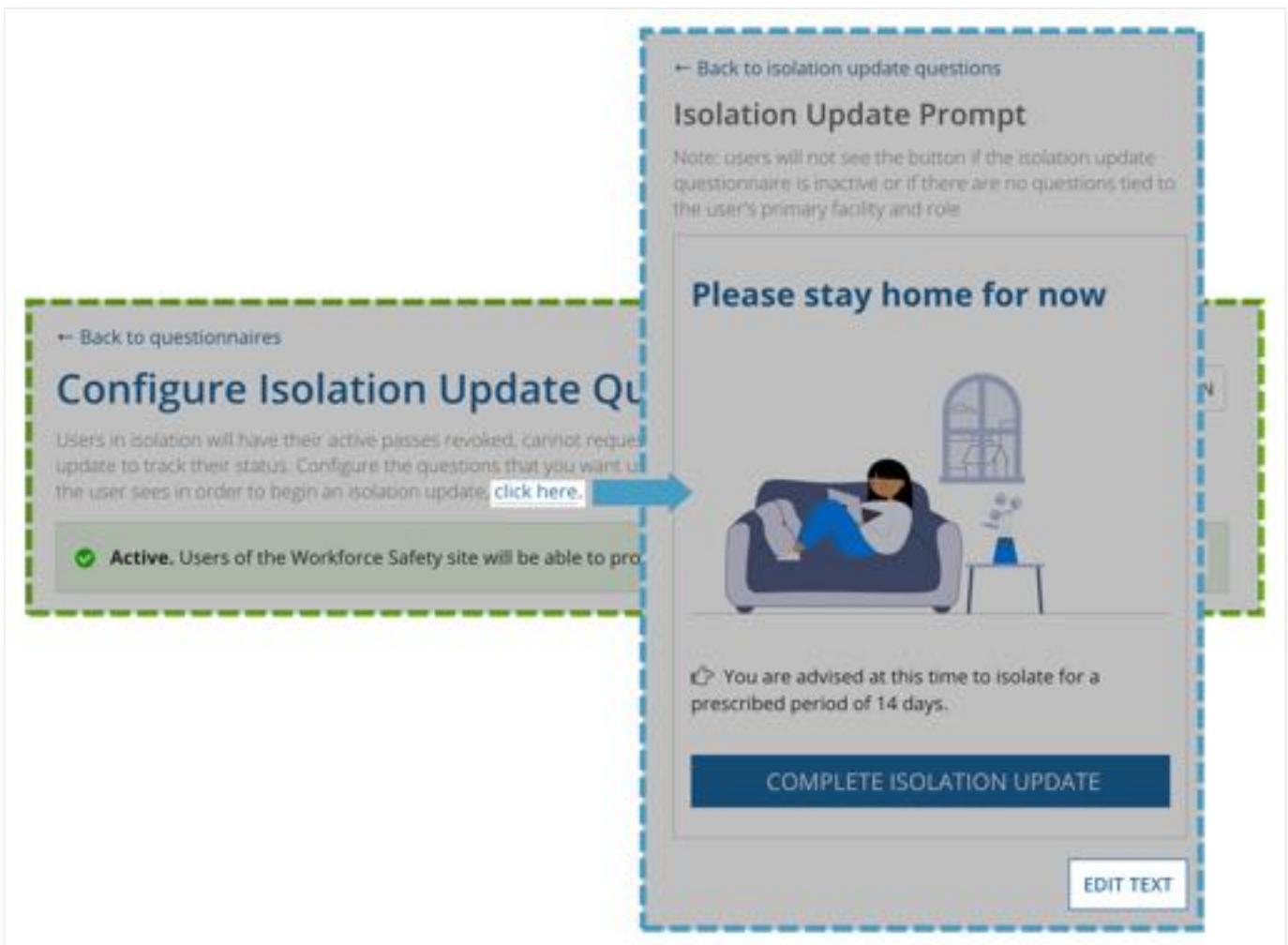
When users are placed into isolation, instead of a pass request section on the homepage, they see an isolation update section. The default message that displays on the homepage for isolation updates is "You are advised at this time to isolate for a prescribed period of 14 days."



You can update this message to whatever you want. For example, you may want to include guidance on how often you want users to complete the isolation update.

To modify the isolation update prompt:

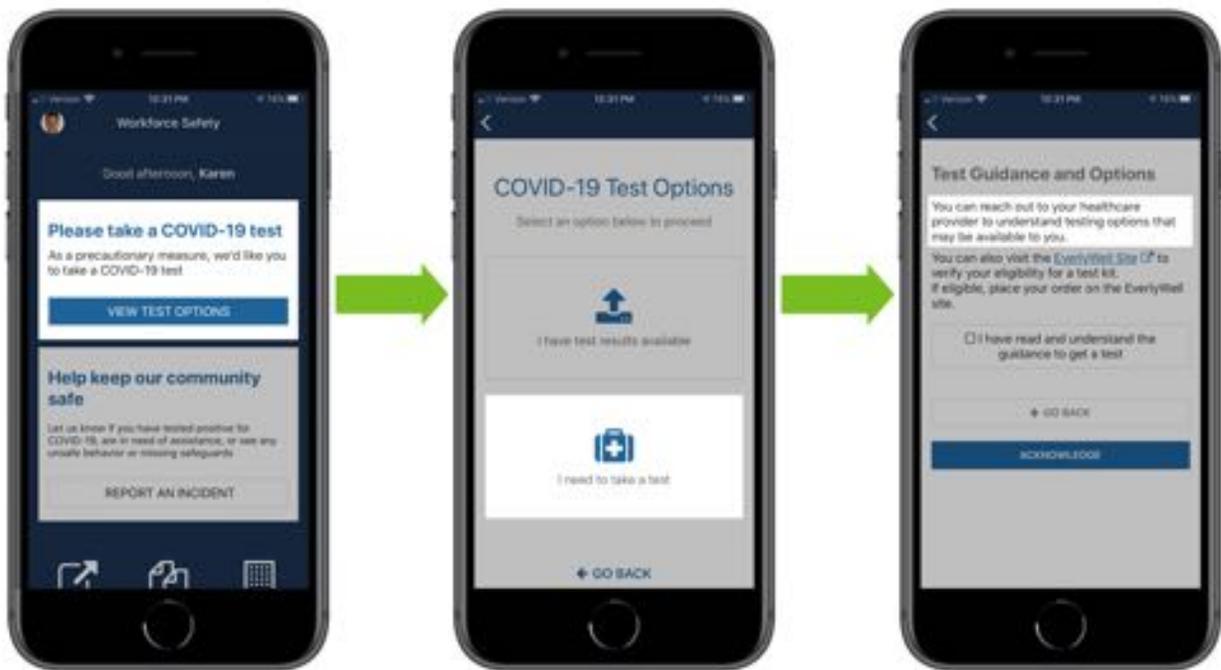
1. From the **CONFIGURE** page, click **QUESTIONNAIRES**.
2. Under **Isolation Update**, click **CONFIGURE**.
3. In the instruction text at the top of the page, click **click here**.
4. Click **EDIT TEXT** and enter your message.
5. Click **SAVE**.



Modifying the default message for COVID-19 testing requests

When response managers request a test from users, they can update the **Testing Guidance** to tell users how to get tested. By default, this message says "You can reach out to your healthcare provider to understand testing options that may be available to you."

This displays on the message that users see after they have been sent a test request and they click **VIEW TEST OPTIONS > I need to take a test.**



Note that this message also displays if a test request is sent automatically when Workforce Safety is configured to [automatically remove users from isolation](#) based on a negative test result.

The message "You can also visit the EverlyWell Site to verify your eligibility for a test kit. If eligible, place your order on the EverlyWell site" will always display for non-pooled test requests.

This allows organizations to take advantage of the partnership that Appian has with Everlywell to offer easy access to FDA-authorized COVID-19 at-home testing from within Workforce Safety.

If you have more specific guidelines, you can modify this default message so that response managers don't have to update it every time.

To modify the default message for COVID-19 testing requests:

1. From the **CONFIGURE** page, click **COVID-19 TESTING**.
2. Click **EDIT MESSAGE** and enter your message.
3. Click **SAVE**.

COVID-19 Testing



1. Select the type of testing to perform for this batch



2. Test requests will be sent out to users in this batch



3. Test participants will upload their test results or in the instance of a pooled test, response managers will upload the pooled test result



4. You can see the results for this group in the **Response Hub > Tests** tab

This is the default message that will be sent by Response Managers when requesting a new test. Response Managers can edit this response manually when sending test requests.

✉ You can reach out to your healthcare provider to understand testing options that may be available to you.

[EDIT MESSAGE](#)

This is the default message that will be sent by Response Managers when requesting a new test. Response Managers can edit this response manually when sending test requests.

Default Message

You can reach out to your healthcare provider to understand testing options that may be available to you.

[CANCEL](#) [SAVE](#)

Modifying the arrival instructions for visitors

Arrival instructions display on visitor's mobile and email passes. Each facility can have different arrival instructions. You can configure this in the Facilities configuration.

Visitor pass email

Maria Lopez

VISITOR

WED
NOVEMBER 11TH

US HQ
TYSONS CORNER, VA

Host
Maria Lopez

Arrival Instructions
Proceed to the front desk to display your pass for security.

Mobile visitor pass

Workforce Safety

US HQ Today

Tysons Corner, VA
United States

11/11
Wednesday

Wednesday

VISITOR

QR Code

Details

Host
Maria Lopez

Arrival Instructions
Proceed to the front desk to display your pass for security.

To update the arrival instructions for a facility:

1. Click **FACILITIES**.
2. Click **NEXT**.
3. Update the **Arrival Instructions for Visitors** field for the facility.
4. Click **SAVE FACILITIES**.

Active	Name	Description	City	Status	Info	Arrival Instructions for Visitors
<input checked="" type="checkbox"/>	HQ	7950 Jones Branch Dr	Tysons Corner, VA	<input checked="" type="radio"/> Open <input type="radio"/> Closed	8am - 5pm	Proceed to the front desk to display your pass for security.
<input checked="" type="checkbox"/>	New York Office	135 Madison Avenue	New York, NY	<input type="radio"/> Open <input checked="" type="radio"/> Closed	NYC location closed	
<input checked="" type="checkbox"/>	Boston Office	77 Sleeper St, Boston	Boston, MA	<input type="radio"/> Open <input checked="" type="radio"/> Closed	Boston office closed	
<input checked="" type="checkbox"/>	Denver Office	1550 Wewatta Street	Denver, CO	<input checked="" type="radio"/> Open <input type="radio"/> Closed	8am - 5pm	There is no on-site check-in desk. Contact your host when you get to the site.
<input checked="" type="checkbox"/>	EMEA HQ (UK)	24 Martin Lane, Lond	London, UK	<input checked="" type="radio"/> Open <input type="radio"/> Closed	9am - 5pm	Enter through the north entrance and check-in with the front desk. Masks are required at all times.

Configure System Settings

Configure Workforce Safety system settings

Response and configuration managers can configure and manage specific system settings from the GENERAL SETTINGS tab, including site branding, user groups, and data management for the Workforce Safety solution.

Want to change the look and feel of your site? See what site branding options are available to modify in [configure site branding](#).

Easily manage user access to site information by [configuring group membership](#).

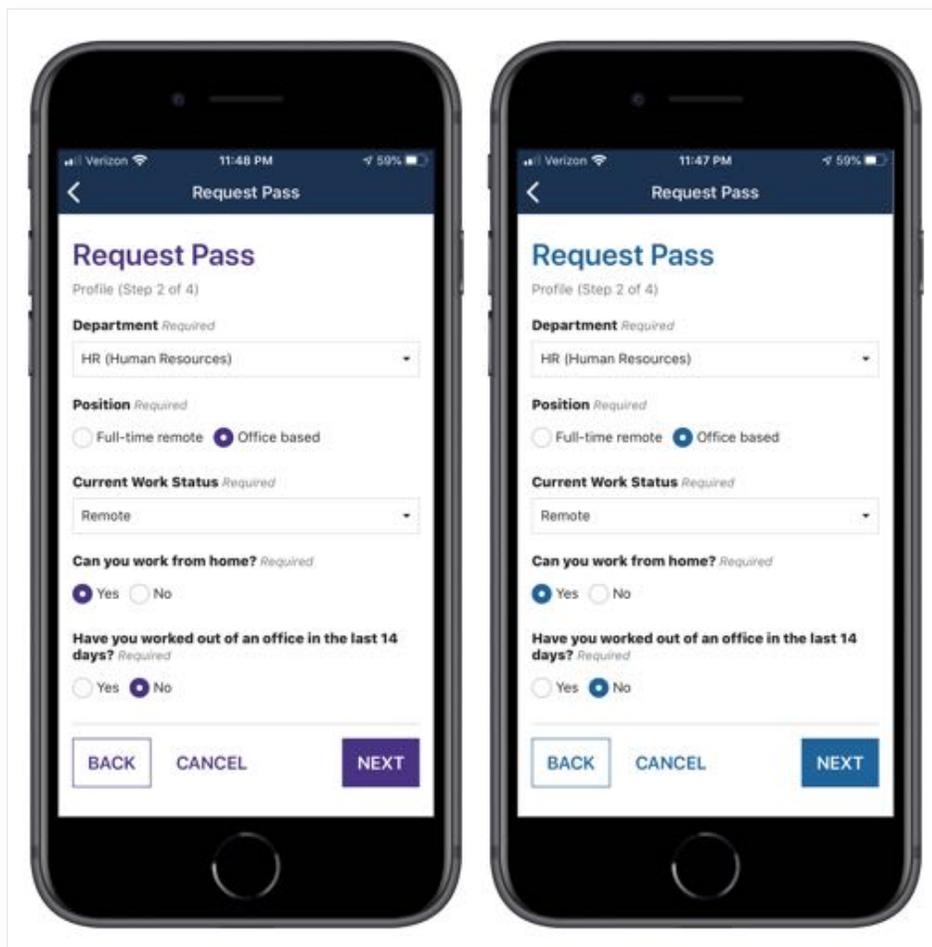
Finally, [manage your data archival process](#) by configuring what data you want the system to archive and when.

Configure site branding

Response and configuration managers can tailor the look of Workforce Safety for your organization by changing the colors and logos.

To configure the branding:

1. Click **BRANDING**.
2. To change the main colors used in the Workforce Safety sites, update the hex codes for the colors in the **Site Color Palette**.
 - **Tip:** The Site Accent color controls elements such as font, button, and tooltip elements.



3. To change the colors used in charts on the **Dashboard** page in the **Response Hub**, update the hex codes for the **Chart Color Palette**.
 - **Tip:** Preview your chart color selections on the pie chart to the right.
4. Hover over the page icon until the **x** appears to remove the default **Logo** and **Favicon**. Click **UPLOAD** to upload your own logo and favicon.
5. Click **SAVE CHANGES**.

Configure Site Branding

Tailor the Workforce Safety Site to your organization's branding.

Change the hex codes below to preview new colors.

Images

Logo

download
PNG - 3.37 KB

Favicon

Sites_Default_favicon
ICO - 1.38 KB

Logo Example



Favicon Example



Colors

Change the hex codes below to preview new colors.

Site Color Palette

Element	Hex Code	Preview
Nav Bar Background	#1a3252	
Selected Tab	#613e90	
Site Accent	#10659c	

Chart Color Palette

Hex Code	Preview
#613e90	
#403364	
#504991	

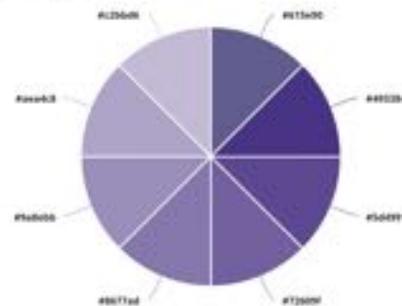
Site Navigation Preview



ACCENT COLOR



Sample Chart Branding Preview



Configure user groups

There are seven different groups for the Response Hub:

- Workforce Safety Administrators
- Workforce Safety Configuration Managers
- Workforce Safety Coordinators
- Workforce Safety Facility Managers
- Workforce Safety Response Managers
- Workforce Safety Screeners
- Workforce Safety Hosts

Each of these groups has a different level of access in the Response Hub. Because Workforce Safety contains personal health information (PHI), it is important to make sure that users are placed into the appropriate groups so that PHI isn't inadvertently revealed.

See the [Groups Reference Page](#) for more information on the information and actions that each group has access to.

Add and remove users from Response Hub groups

Response managers and administrators can add or remove people from these groups directly from the Response Hub.

To modify group membership:

1. From the **CONFIGURE** page, click **GENERAL SETTINGS**.
2. In the **System Settings** section, click **User Groups**.
3. Select a group from the drop-down list.
4. To add group members:
 - Click **ADD MEMBERS**.
 - Search for the users to add.
 - Click **ADD TO GROUP**, then click **YES, ADD**.
5. To remove group members:
 - Select the user or users to remove.
 - Click **REMOVE MEMBERS**, then click **YES, REMOVE**.

Groups

Workforce Safety Administrators

Workforce Safety Administrators

Members of this group receive emails when there are errors in the solution processes so that they can monitor and respond to these errors. They can also manage users and groups that control access to Workforce Safety and configure data management.

ADD MEMBERS REMOVE MEMBERS

Search for users to add

ADD TO GROUP CANCEL

<input type="checkbox"/>	Name	Member Type
<input type="checkbox"/>	James Baker <small>james.baker</small>	Direct
<input type="checkbox"/>	Joseph Clark <small>joseph.clark</small>	Direct
<input type="checkbox"/>	Laura Davis <small>laura.davis</small>	Direct
<input type="checkbox"/>	Maria Lopez <small>maria.lopez</small>	Direct
<input type="checkbox"/>	Maria Lopez <small>maria.gomez</small>	Direct
<input type="checkbox"/>	Mary Lawson <small>mary.lawson</small>	Direct

GO BACK

6 items

You may notice that the Workforce Safety Screeners group has some indirect members. That is because members of the Response Managers group are automatically members of this group. In order to remove indirect members from the screeners group, you would have to remove them from the Response Managers group.

Manage data archival

The longer you use Workforce Safety, the more data your organization creates. Too much data may cause end users to experience slow app performance. If certain data is no longer needed for business purposes, it is a good idea to archive it so that it doesn't affect the performance of Workforce Safety.

Archived data is no longer visible from the Workforce Safety site, but it can be retrieved in the future. This is because it isn't deleted, but moved to a different table in the database.

The Data Management configuration allows administrators to determine what data to archive and when to archive it.

See also:

- See [Data archival strategy](#) for recommendations on when to archive data.
- See [Archived data](#) for an explanation of how archived data can affect information in the Response Hub.

Permissions to manage data archival

Only members of the Workforce Safety Administrators group have access to the Data Management configuration. Response Managers do not have access to this configuration unless they are a member of the administrator group.

Setting data archival time frames

You can archive the following data:

- Pass requests
- Incidents
- Surveys
- Isolation updates
- Individual and pooled tests
- People and areas that users have logged for contact tracing

To specify which data to archive and when to archive it:

1. From the **CONFIGURE** page, click **DATA MANAGEMENT**.
2. For the data you would like to archive, select when to archive it. You can enter a custom number of days by selecting **Custom** and entering the number of days.
3. Click **SAVE CHANGES**.

Data Management

Specify the time after which data should be archived in the system.

Data archival logic and instructions to retrieve archived data ▾

	Archive Data
Pass Requests (673 active data entries)	After 90 days ▾
Incidents (49 active data entries)	Custom ▾ 180 days
Surveys (2 active data entries)	After 60 days ▾
Isolation Updates (8 active data entries)	Never ▾
Tests ⓘ (26 active data entries)	Never ▾
Logged Contacts ⓘ (274 active data entries)	Never ▾

CANCEL

SAVE CHANGES

Configure Facilities

Configure facilities

From the Facilities tab, response managers, facility managers, and configuration managers can add, edit, open and close facilities, and inactivate and reactivate facilities.

Add a new facility

You can quickly add one or more facilities by specifying the following information for each location:

- Facility name
- Description
- Country (the state or province field only displays for Canada and the United States)
- Street address, city, and zip code
- Open or closed status
- Arrival instructions
- Additional information

When you add a new facility, by default, it's set to active. If you need to add a number of facilities at one time, you can [import multiple facilities](#) using an Excel spreadsheet.

To add a facility:

1. From the **CONFIGURE** page, click **FACILITIES**.
2. Click **ADD FACILITY**.

The screenshot shows the 'Facilities' management page in the Applan Workforce Safety system. The page has a navigation bar at the top with 'applan' and menu items: 'INCIDENTS', 'ACTIVITY', 'PEOPLE', 'REPORTS', and 'CONFIGURE'. A 'Response Hub' is visible in the top right. The main heading is 'Safely manage your onsite workforce'. Below this are two introductory cards: 'Workforce Safety Homepage' and 'Workforce Safety Documentation'. The 'Facilities' section is active, showing a table of facilities with columns for Facility Name, Status, Description, Street Address, Unit/Suite/Building, City, State/Province, Country, Zip Code, Info, Arrival Instruction for Visitors, and Configuration. The table lists four facilities: HQ, UK (EMEA HQ), Boston Office, and Denver Office.

Facility Name	Status	Description	Street Address	Unit/Suite/Building	City	State/Province	Country	Zip Code	Info	Arrival Instruction for Visitors	Configuration
HQ	Open	Headquarters	135 Madison Avenue, 4th Floor, New York,...	Building 101	Tysons Corner	Virginia	United States	22102	Sam - 5pm	Please Present your pass to the front d...	Active
UK (EMEA HQ)	Open	London HQ	24 Martin Lane, London, EC4R 0DP	London High	London		United Kingdom	W68 3P	Sam - 5pm	After arriving at the facility please pr...	Active
Boston Office	Closed	Boston state building	77 Sleeper St, Boston, MA 02210	Boston Unit	Boston	Massachusetts	United States	02210	Boston office closed due to local regula...	After arriving at the facility please pr...	Active
Denver Office	Open	Denver HQ	1550 Birnville Street, Denver, CO	Denver Building	Denver	Colorado	United States	80202	Sam - 5pm	Facility opens at 9am and closes at 6pm,...	Active

3. In **Name**, add a unique facility name.
 - Workforce Safety displays a validation error, if you attempt to add a facility name that already exists.
4. (Optional) In **Description**, enter a facility description.
5. Enter the **Country** for your facility, and the **State/Province** only if applicable for your region.
6. Enter the **Street Address**, **City**, and **Zip** for your facility in the corresponding fields.
 - **Note:** The street address you enter for the facility is included in visitor notifications so they know exactly where to report for an on-site visit.
7. Set the facility status to **Open** or **Closed**.
 - Users and visitors can request a pass for an *open* facility.
 - Users cannot request a pass for a *closed* facility but visitors can.
8. (Optional) In **Info**, enter any additional information you want to communicate to users and visitors about the status of the facility, like operational hours.
9. (Optional) In **Arrival Instructions for Visitors**, enter any instructions or additional guidance that you want to communicate to visitors that are visiting the facility.
 - **Note:** The instructions in the **Arrival Instructions for Visitors** field displays on a visitor's mobile and email passes. See [Modifying arrival instructions for visitors](#) for more information.
10. Click **SAVE** to add the single facility. Alternatively, you can click **SAVE AND ADD ANOTHER** to save the facility and add another facility.

Import facilities

From the **FACILITY** page, you can also perform a bulk import when you want to add multiple facilities at one time. Workforce Safety allows you to import an Excel spreadsheet or CSV file that contains all of your facilities to the solution so that you can easily upload them all at one time.

The screenshot displays the 'Facilities' management interface in Appian. At the top, there's a navigation bar with 'appian' logo and menu items: 'INCIDENTS', 'ACTIVITY', 'PEOPLE', 'REPORTS', 'CONFIGURE', and 'Response Hub'. Below the navigation, the main heading is 'Safely manage your onsite workforce'. There are two introductory cards: 'Workforce Safety Homepage' and 'Workforce Safety Documentation'. The main content area is titled 'Facilities' and includes a sub-heading: 'Facilities are physical locations in your organization that your workforce needs to enter on a day-to-day basis.' There are buttons for 'IMPORT FACILITIES' and '+ ADD FACILITY'. A search bar is present with filters for 'City', 'State/Province', and 'Country'. The main table lists facilities with columns: Facility Name, Status, Description, Street Address, Unit/Suite/Building, City, State/Province, Country, Zip Code, Info, Arrival Instruction for Visitors, and Configuration. The table contains four rows of facility data.

Facility Name	Status	Description	Street Address	Unit/Suite/Building	City	State/Province	Country	Zip Code	Info	Arrival Instruction for Visitors	Configuration
HQ	Open	Headquarters	135 Madison Avenue, 4th Floor, New York,...	Building 101	Tysons Corner	Virginia	United States	22102	Sam - 5pm	Please Present your pass to the front d...	Active
UK (EMEA HQ)	Open	London HQ	24 Marsh Lane, London, EC4R 0DR	London High	London		United Kingdom	W69 9J	Sam - 5pm	After arriving at the facility please p...	Active
Boston Office	Closed	Boston state building	77 Sleeper St, Boston, MA 02210	Boston Unit	Boston	Massachusetts	United States	02210	Boston office closed due to local regula...	After arriving at the facility please p...	Active
Denver Office	Open	Denver HQ	1550 Wewatta Street, Denver, CO	Denver Building	Denver	Colorado	United States	80202	Sam - 5pm	Facility opens at 8am and closes at 6pm...	Active

To import your facilities, you can download and use the **Facility_Import** Excel template that Appian provides. Use this template to copy your facilities and create your own CSV file. If you already have your own CSV file or spreadsheet of your facilities, be sure to use the same column headers and format provided in the sample template file before performing a bulk upload.

To import your facilities:

1. From the **CONFIGURE** page, click **FACILITIES**.
2. Click **IMPORT FACILITIES**.
3. Click **UPLOAD**.
4. Locate and select the facilities spreadsheet you want to upload.
5. Click **NEXT** to preview a list of your facilities before importing.
 - o In this preview, Workforce Safety allows you to perform inline editing to correct any errors in your facilities information.
6. Click **IMPORT**.

Edit an existing facility

Operational adjustments may require you to quickly make site changes, including changing a facility's status to indicate whether it is *open* or *closed*. You can easily edit an existing facility from the Facilities list.

Designating a facility as *open* or *closed* determines whether users and visitors have access to request a pass for the facility. When a facility is closed visitors can still receive passes but internal users cannot.

To edit a facility:

1. From the Facilities list, locate the facility you want to update.
2. Click the ellipsis icon **⋮** at the end of the row and select **Edit**.
3. In the **Edit Facility** dialog, modify the information you want to change.
4. Click **SAVE**. Note that when you update a facility's open or closed status, be sure to update the status for the corresponding [areas](#).

Deactivating and reactivating facilities

If you would like to completely remove a facility from the facilities list because it is a duplicate, you made an error when entering the facility, or the facility is permanently closed, you can inactivate the facility.

Inactivating a facility is different than updating the site status to closed, which indicates that the facility is temporarily unavailable to users and visitors. Inactivating a facility causes the following actions to occur:

- Triggers a facility closure and deactivates all associated areas.
- Prevents all users, including response managers, from submitting a pass request for the facility.

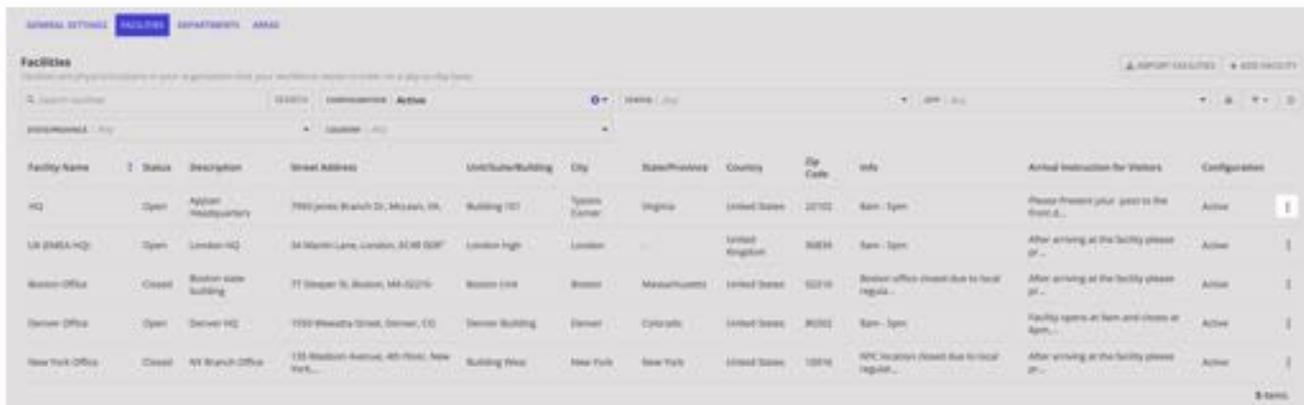
- Revokes all active user passes to the facility. Visitor passes are not revoked.
- Sends a facility closure notification to all affected users.
- Removes the inactive facility from the facilities list that users have access to view. **Note:** Inactive facilities still show up in the Pass Request report.

If you no longer want to use a facility, inactive it. If you still plan to use the facility in the future but want to prevent users from requesting a pass for the facility, close it instead.

Response Managers can still view inactive facilities from the facilities list.

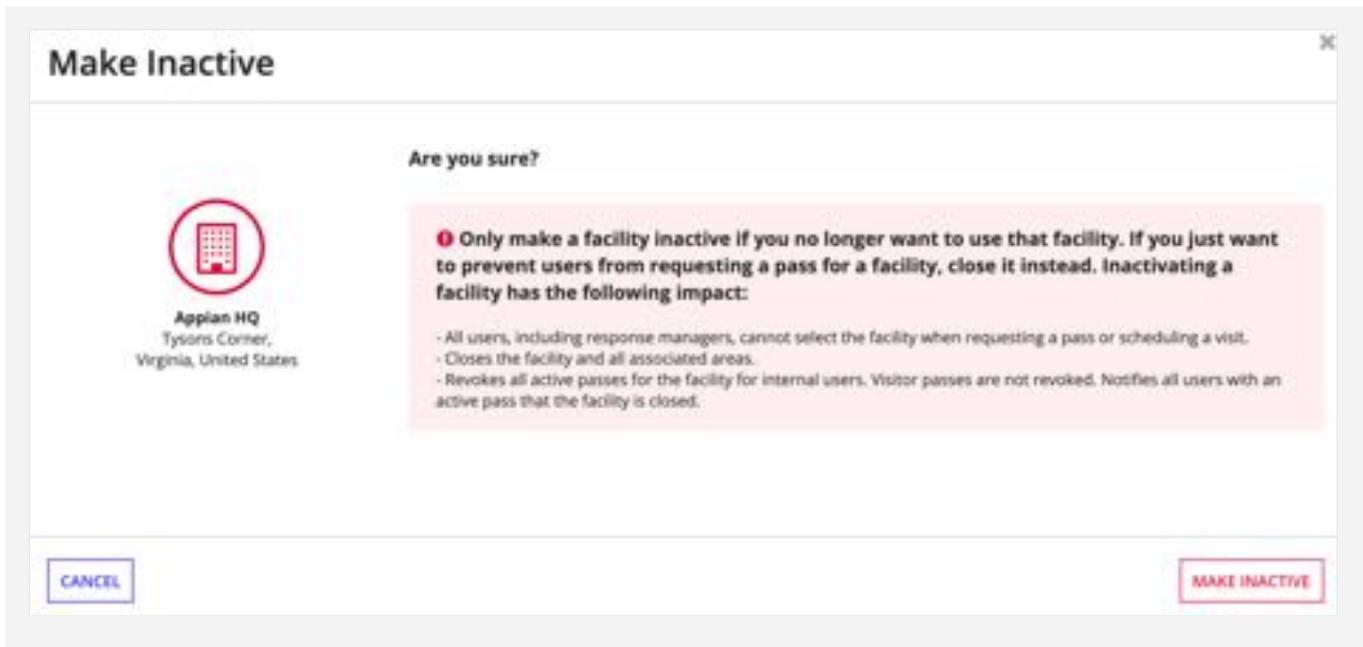
To inactivate an active facility:

1. From the Facilities list, locate the facility you want to update.
2. Click the ellipsis icon  at the end of the row and select **Set to Inactive**.



Facility Name	Status	Description	Street Address	Unit/Sub/Bldg	City	State/Province	Country	Zip Code	Info	Arrival Instruction for Visitors	Configuration
HQ	Open	Applian Headquarters	7700 Jones Branch Dr, Manassas, VA	Building 107	Tysons Corner	Virginia	United States	20102	Open - Open	Please Present your pass to the front desk.	Active 
UK DATA HQ	Open	London HQ	24 Market Lane, London, EC4M 3DF	London High	London		United Kingdom	EC4M 3DF	Open - Open	After arriving at the facility please p...	Active 
Boston Office	Closed	Boston Main Building	77 Stoughton St, Boston, MA 02210	Boston Core	Boston	Massachusetts	United States	02210	Boston office closed due to local regula...	After arriving at the facility please p...	Active 
Denver Office	Open	Denver HQ	1550 Wewatta Street, Denver, CO	Denver Building	Denver	Colorado	United States	80202	Open - Open	Facility opens at 9am and closes at 4pm...	Active 
New York Office	Closed	NY Branch Office	133 Madison Avenue, 4th Floor, New York, NY	Building Floor	New York	New York	United States	10017	NYC location closed due to local regula...	After arriving at the facility please p...	Active 

3. From the **Make Inactive** dialog, click **MAKE INACTIVE**.



To reactivate an inactive facility:

1. From the Facilities list, locate the facility you want to activate.
2. Click the ellipsis icon  at the end of the facility row and select **Set to Active**.
3. To allow users to request a pass to the facility, [edit the facility](#) to update the status to **Open**.

Reactivating areas

When a facility is deactivated, any areas that were configured to use the facility will also be deactivated. Note also that any departments that were associated with the deactivated facility, will be removed from the **Where should this department report to?** list.

To reactivate an inactive area:

1. From the **CONFIGURE** page, click **AREAS**.

2. Clear **Show only active areas** checkbox.
3. Toggle the **Inactive** icon to **Active** for each area of the facility that needs to be reactivated.
4. Select **OPEN** for each area that you want to open.
5. Click **SUBMIT**.

Configure Departments

Configure departments

Workforce Safety allows response managers, facility managers, and configuration managers to specify the departments that are unique to your organization. They can also link departments to the facilities and areas where employees of those departments typically work. Linking facilities, areas, and departments helps ensure your employees can maintain safe social distancing.

If you made a mistake when entering a department and would like to remove it from the list of departments, you can deactivate it.

When you deactivate a department, the following happens:

- A user's dept will remain in their profile (even if deactivated) until the user reselects and saves their department.
- Any current cohorts with that department will remain, even if the department is deactivated.

Make sure you configure at least one department. This is a required field on the profile update which is the first step users must take when they log in to Workforce Safety. If you don't configure departments, users won't be able to update their profile, which means they cannot request a pass or complete a survey.

To manage departments for your organization:

1. Click **DEPARTMENTS**.
2. To deactivate a department, toggle the active icon to inactive .
3. To add a new department, click **ADD DEPARTMENT**.
 - Enter the department **Name**.
 - If **Cohort Management** is toggled on, select a **Cohort**.
 - Select a **Facility** and one or more **Areas** that the department normally reports to. If employees of the department can report to any areas in that facility, select **All Facility Areas**.
 - If employees of the department can report to multiple facilities, click **Associate with an Additional Facility**.
 - Click **SUBMIT**.
4. To edit a department, click the edit icon .
 - To edit the **Name**, click the edit icon  and enter a new name.
 - Edit the **Cohort**, **Facility**, **Areas**, or **Associate with an Additional Facility**, then click **SAVE CHANGES**.

Edit Department

Set up department information, map the department to the cohort and link the department to all facility areas where those department employees mainly work.

Name

Information Technology 

DEACTIVATE

Cohort

M/W/F

M/W/F users are eligible to request a pass for the following days only: Sunday, Monday, Wednesday, Friday and Saturday.

Where should this department report to?

Facility *	Areas *	
US HQ	First Floor	<input type="checkbox"/> All Facility Areas 
New York Office	All Facility Areas	<input checked="" type="checkbox"/> All Facility Areas 

 Associate with an Additional Facility

CANCEL

SAVE CHANGES

Configure Areas

Configure areas

After facilities are configured, response managers, facility managers, and configuration managers can specify areas for each of their facilities, such as floors and conference rooms. They can also set the daily capacity for each area.

If [Enforce Area Capacity Restrictions](#) is toggled on, the number of passes that can be generated for an area will be limited to the daily capacity of the area. This can help maintain social distancing in your facilities. Note that if this feature is toggled on, each facility must have at least one open area configured. If not, users won't be able to request passes for that facility.

GENERAL SETTINGS FACILITIES DEPARTMENTS **AREAS**

Enforce Area Capacity Restrictions
When toggled on, internal users will be asked to select an area when requesting a pass. Passes can only be requested for areas that haven't reached capacity for the given day.

For all areas in a closed facility, please update the status to closed.

Areas
Use areas to break your facilities into smaller components like floors and subareas. Configure areas for all facilities to ensure users will be able to request passes from them. Passes cannot be requested for closed areas. SAVE AREAS

Show only active areas

Active	Area Name	Area Status	Facility	Facility Status	Daily Capacity
<input checked="" type="checkbox"/>	Main Lobby - Floor 1	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	HQ	<input checked="" type="checkbox"/> Open	100
<input checked="" type="checkbox"/>	Main Reception - Floor 11	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	HQ	<input checked="" type="checkbox"/> Open	100
<input checked="" type="checkbox"/>	Sales - Floor 10	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	HQ	<input checked="" type="checkbox"/> Open	50
<input checked="" type="checkbox"/>	Marketing - Floor 11	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	HQ	<input checked="" type="checkbox"/> Open	40
<input checked="" type="checkbox"/>	HR & Support - Floor 9	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	New York Office	<input checked="" type="checkbox"/> Closed	50
<input checked="" type="checkbox"/>	Customer Success - Floor 8	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	New York Office	<input checked="" type="checkbox"/> Closed	100
<input checked="" type="checkbox"/>	Customer Success - Floor 7	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Boston Office	<input checked="" type="checkbox"/> Closed	100
<input checked="" type="checkbox"/>	Engineering - Floor 6	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Boston Office	<input checked="" type="checkbox"/> Closed	100
<input checked="" type="checkbox"/>	Engineering - Floor 5	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	New York Office	<input checked="" type="checkbox"/> Closed	50
<input checked="" type="checkbox"/>	Large Kitchen - Floor 10	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Denver Office	<input checked="" type="checkbox"/> Open	20
<input checked="" type="checkbox"/>	Large Kitchen - Floor 9	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Denver Office	<input checked="" type="checkbox"/> Open	20
<input checked="" type="checkbox"/>	Large Kitchen - Floor 8	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Denver Office	<input checked="" type="checkbox"/> Open	20
<input checked="" type="checkbox"/>	Large Kitchen - Floor 7	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	Boston Office	<input checked="" type="checkbox"/> Closed	20
<input checked="" type="checkbox"/>	Main Conference Room - Floor 9	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	UK (EMEA HQ)	<input checked="" type="checkbox"/> Open	20

Note that when you close a facility, all areas associated with the closed facility are also closed. You must update the Area Status of all associated areas to *closed*.

If you made a mistake when entering an area and would like to remove it from the list of areas, you can deactivate it. This is different than updating the area status to closed, which indicates that the area is closed temporarily.

When you deactivate an area, the following happens:

- Deactivated areas will not show up as an option to select in any pass requests moving forward.
- Existing passes will continue to have the deactivated area.
- Deactivated areas still show up in pass request reporting.
- Any deactivated areas will no longer go towards capacity restrictions.

To manage areas for your facilities:

1. Click **AREAS**.
2. To add a new area, click **Add Area**.
3. Add or update the following for each area:
 - **Area Name**.
 - Whether the area is **Open** or **Closed**.
 - **Facility** that the area is in.
 - **Daily Capacity** for the area.
4. To deactivate an area, toggle the active icon to inactive .
5. For any facility that is closed, make sure the **Area Status** for each area in that facility is also closed.
6. Click **SUBMIT**.

Manage Areas

Use this form to set up areas and link them to specific facilities. When deactivating an area, users will only be able to select the active areas in their Pass Request.

Use areas to break your facilities into smaller components. For example, an office building could have floors, breakrooms, and cafeterias and a production facility could have pre-production, assembly, and test areas.

Users can only request passes for facilities which have areas associated with them. Daily capacity determines the number of passes issued for a day. If an area reaches capacity, passes are no longer issued until the following day.

Refer to your local guidelines to determine the recommended physical distance between each workspace. Use the recommended physical distance to come up with an estimated daily capacity limit per area.

Show only active areas

Active	Area Name	Area Status:	Facility	Facility Status	Daily Capacity
<input checked="" type="checkbox"/>	First Floor Lounge	<input type="radio"/> OPEN <input checked="" type="radio"/> CLOSED	US HQ	<input checked="" type="checkbox"/> Closed	4
<input checked="" type="checkbox"/>	First Floor	<input type="radio"/> OPEN <input checked="" type="radio"/> CLOSED	US HQ	<input checked="" type="checkbox"/> Closed	20
<input checked="" type="checkbox"/>	Second Floor	<input type="radio"/> OPEN <input checked="" type="radio"/> CLOSED	US HQ	<input checked="" type="checkbox"/> Closed	20
<input checked="" type="checkbox"/>	First Floor	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	EMEA HQ	<input checked="" type="checkbox"/> Open	10
<input checked="" type="checkbox"/>	Second Floor	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED	EMEA HQ	<input checked="" type="checkbox"/> Open	15

Closed areas for closed facility

Daily capacity limits

[Add Area](#)

CANCEL

SUBMIT

Groups Reference Page

Introduction

Workforce Safety uses [groups](#) to give users access to different parts of the solution.

All users are automatically added to the Workforce Safety Users group. This group has access to all actions and information on the Workforce Safety home page.

By adding users to the screeners, facilities manager, coordinators, configuration manager, and response managers groups, you are giving them access to the Response Hub. The information they can see and the actions they can perform on this site depends on the groups they are in.

This page lists the default groups provided with Workforce Safety and what access is granted to members of those groups in the Response Hub.

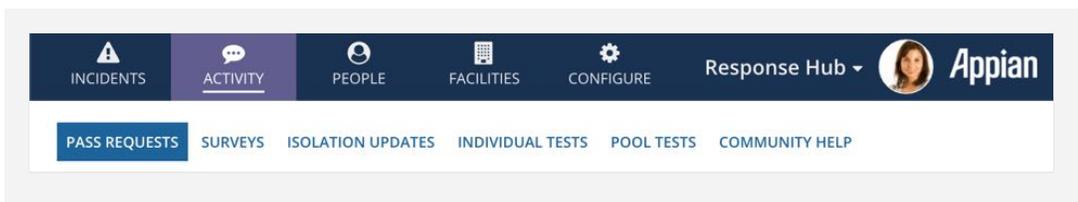
See also

- For instructions on how to add and remove members from these groups, see the [Configuration Guide](#).

Information and actions available to users in the Response Hub

This table lists the information and actions that are available in the Response Hub and the groups that control access to them.

Response Managers have access to all information and actions in the Response Hub, including all of the pages and tabs.



Response Hub Information and Actions	Administrators	Screeners	Facilities Managers	Coordinators	Configuration Managers	Response Managers
Receive process errors.	X					
Manage users and groups in Appian Designer.	X					
Manage users and groups in Response Hub.	X					X
View the Response Hub.	X	X	X	X	X	X
Incidents page						
View all data on the Incidents page.						X
Manage and create incidents.						X
Notify exposed people.						X
Activity page						
View the Activity page.		X	X	X		X
View Pass Requests report, except Eligibility Status and Incident Created filters and columns.		X	X			

Response Hub Information and Actions	Administrators	Screeners	Facilities Managers	Coordinators	Configuration Managers	Response Managers
Request a pass on behalf of a user.		X				X
Schedule visits for visitors.*		X				X
Add new visitors.*		X				X
View all data on the Pass Requests report.						X
View all data on the Survey report.						X
View all data on the Isolation report.						X
View all data on the Individual Tests and Pooled Tests reports.						X
Request tests.						X
Verify test results.						X
Provide test results						X
Cancel test requests						X
View all data on the Community Help report.				X		X

Response Hub Information and Actions	Administrators	Screeners	Facilities Managers	Coordinators	Configuration Managers	Response Managers
Match with volunteer, reassign, and close help requests				X		X
People page						
View all data on the People page.						X
Request tests.						X
Reports page						
View reports.						X
Configuration page						
Configure data management to automatically archive data.	X					
View facilities from the facilities configuration page.		X	X	X	X	X
Configure facilities, departments, and areas.			X		X	X
Scan passes in the mobile application.		X				X
Toggle the Community Volunteering and Help Requests feature option.				X		X

Response Hub Information and Actions	Administrators	Screeners	Facilities Managers	Coordinators	Configuration Managers	Response Managers
Configure volunteer options.				X		X
Manage all other configurations.					X	X

*All members of the Workforce Safety Hosts group can also schedule and add visitors from the Workforce Safety home page. This group automatically includes the Workforce Safety Response Managers and Workforce Safety Screeners groups.

Syncing users to the database

Every night a process runs that updates the table in the database that stores user information to match the Workforce Safety Users group.

When users are deactivated or added to the Workforce Safety Users group, the changes might not show up in Workforce Safety right away. Instead, reports like the People page will be updated each night when this sync occurs.

Information and actions available to users in the user summary

Any user that has access to the Response Hub, except configuration managers, can see certain information for each user in the user's summary page. This information is displayed whenever you click on a user's name in the Response Hub.

The following image outlines which information each group has access to.

Response Managers have access to all information and actions in this view. These actions include:

- Updating user status.
- Requesting a pass on behalf of a user.
- Updating the user's profile.
- Deleting data for a user.
- Requesting a test for a user.

