Workforce Safety v7 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 20.3 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.
- 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 or exposed to COVID-19.

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

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.

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.

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 received a positive COVID-19 diagnosis can report their diagnosis 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.

Isolating workers based on COVID-19 diagnosis or exposure

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

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

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.

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 features of the solution and group security, see the User Guide.

Workforce Safety 7.0 Release Notes

Host visitors with confidence

Are your employees concerned that visitors outside the organization aren't being held to the same safety standards when reporting to and sharing the same facilities as them?

With the external visitors feature, your organization can schedule and host visitors on-site.

Proactively capture visitor contact information for later contact tracing efforts, screen visitors prior to them arriving on-site, and restrict who can host visitors within your organization.

You can even screen visitors on-site the day of their visit if they forgot to complete their screening or show up spontaneously.

No need to sacrifice safety for business continuity. Hold your visitors to the same standards as your employees with added support for visitors!

Richer contact tracing with visitors

Visitors are now selectable when employees are filling in their close contacts. This ensures that anyone, employee or visitor, entering your workplace bubble is available for contact tracing. Visitors are distinguished throughout the solution with a visitor tag.

Control whether questionnaires are prepopulated with a user's previous answers

Do you want a user to start with an empty questionnaire every time they request a pass? Now, you can control whether a questionnaire is prepopulated with a user's most recent answers.

Simply navigate to the Configure tab in the Response Hub and select **Manage Site Features**. Using the **Prepopulate Questionnaire Answers** toggle, you can configure whether questionnaires are prepopulated. This applies to all questionnaires including Pass Requests, Surveys, and Isolation Updates.

Note that the pass request experience may be slower if prepopulation is toggled off.

Provide helpful information next to questions

Sometimes users need more context for a questionnaire question. Now, you can provide helpful information next to any question. This text appears in the form of a tooltip which users can tap to see more information to clarify context, terms, or get guidance in how to answer a question.

In addition, the character limit of questions has been extended to 1000 characters to help you phrase a question just right.

User statuses, simplified

We've simplified the various user statuses to clearly indicate a user's eligibility. Each user will have one of the following statuses: Status Pending, Qualified, Not Qualified, or Isolated.

If a user is in a Status Pending state, they have not yet completed a survey or pass request questionnaire.

After a user has completed a survey or pass request, depending on how they responded, they may be in a Qualified or Not Qualified state. Qualified users are eligible to request a pass. Not Qualified users are asked to stay home and are not able to request a pass.

If a user has an open COVID-19 Positive incident, their status is automatically updated to Isolated. Response managers can also manually update a user's status to Isolated. Isolated users cannot request a pass until their COVID-19 Positive incident is closed or they are manually removed from isolation.

Current statuses will be automatically mapped to the new statuses. The below diagram shows how the these statuses are mapped.

Note that in the diagram above, a user who was previously Survey Qualified with Incident may be Qualified or Not Qualified. If at the time of upgrading the Pass Requests Disabled by Active Survey Incidents toggle is on, a user will be Not Qualified. Otherwise, they will be Qualified.

You may want to know exactly why a user is Qualified or Not Qualified. Now, a person's record will provide details about the reasons a user is in a particular status.

Additionally, if you have the **Pass Requests Disabled by Active Survey Incidents** toggle enabled, once a survey incident is closed, the impacted user's status will automatically be updated to reflect their new qualifications. Previously, a user had to complete a pass request for their status to update.

Quickly identify users who haven't completed the survey

Thanks to the simplification of user statuses, it's now easier than ever to determine who has not yet completed an active survey. If a survey is currently active, simply filter **Eligibility Status** in the people grid to **Status Pending**. The resulting list will show all users who have not yet completed the active survey. This list can also be exported to Excel.

Updated User Status Actions

Along with the update to user statuses, we've also split the "Update User Status" action into three distinct actions.

Using the new **Isolate User** and **Remove User from Isolation** actions, you can manually manage a user's isolation.

The **Isolate User** action places a user in isolation, preventing them from requesting a pass and emailing them an isolation guidance message.

The **Remove User from Isolation** action takes a user out of isolation, notifies the user, and updates the user's status to their pre-isolation status. They will then be able to request a pass, unless their new status is "Not Qualified".

Sometimes you may want to skip the active survey on behalf of a user, allowing them to request a pass. Now, you can use the **Skip Survey** action to skip the active survey on behalf of a user who has not yet qualified through the survey. Once completed, the user's status is updated to **Qualified** and they are able to request a pass. The user will no longer be able to complete the survey.

Release History

The following support information applies to Workforce Safety. To upgrade to Workforce Safety version 7.0, see the version 7.0 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 7.0 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 v7.0 of Workforce Safety, see the version 7.0 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 20.3 Hotfix B (20.3.176.0) or later. Appian HIPAA Cloud is recommended to ensure potential sensitive employee health data is protected.
- A supported version of a MySQL or MariaDB database as a business data source.
  - **Note**: Instructions below are tailored for MySQL 5.7 and 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.

Step 1: Download software package

This package contains the following files:

- Application Zips:
  - `Workforce Safety Solution v7.0.zip`
- SQL Files
  - `Workforce-Safety-v7.0-Solution-Master-SQL-Script.sql`
  - `Workforce-Safety-v7.0-Delta-Script.sql`
    - **Note**: The delta script file will not be used during installation and can be deleted.

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

1. Go to the Software Downloads site.
2. Go to the **DOWNLOADS** tab.
3. Click **SOLUTIONS**.

4. Find and open "Workforce Safety Solution v7.0".
5. Download the download package.
6. To reduce confusion in the following steps, delete the `Workforce-Safety-v7.0-Delta-Script.sql` file.

Step 2: Deploy Plugins

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

- Personalization Utilities (v3.6.7)
- Regular Expression Functions (v2.1.1)
- Load Resource Bundle (v1.2.0)
- Barcode and QR Code Utilities(v1.0.0)

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**.

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

Self-Managed Environments

To deploy the plug-in 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-v7.0-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 v7.0.zip` file that was downloaded in Step 1.
5. Click **IMPORT PACKAGE**.
   - **Note**: The import may time out due to file size, but import will continue in the background.
   - **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. The tables will be created for you.

To check the status of the import:

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

2. 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.

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**.

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.

- Click **ADD MEMBER**.
- Use the **Users to Add** picker to select the user or users, and click **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: 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 4: 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 5: 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 by ensuring that the number of users using Workforce Safety doesn't exceed the optimal number of users that the default infrastructure can handle. 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.

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

Home Page User Guide

Introduction

In order to keep employees safe and healthy, you need information from them: Are they at increased risk if they come back to the workplace? Are they experiencing symptoms of COVID-19 or have a higher risk of becoming infected? Have they noticed any unsafe conditions? How are they feeling and do they need any assistance?

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 response hub, see the Response Hub User Guide.

Workforce Safety home page

Workforce Safety contains a home page where users can:

- Update user profile.
- Complete surveys (if enabled).
- Request passes.
- Log contacts.
- Report incidents (if enabled).
- Complete isolation updates
- Submit COVID-19 test results.
- 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 the 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.

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:

- 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 test results.

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

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 or COVID-19 Positive Incident feature is active, they will not be able to request a pass for any facility, and their active passes will be revoked.

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.

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 positive 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.

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 or COVID-19 positive diagnoses.

To report an incident:

1. From the Workforce Safety home page, click **REPORT AN INCIDENT**.
2. Select whether it is a **COVID-19 POSITIVE INCIDENT** or a **NON-COVID-19 POSITIVE INCIDENT**.
    - **Note**: If **COVID-19 POSITIVE 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**.

If a COVID-19 positive incident was created, the user will be automatically placed into isolation. Users can only have one open COVID-19 positive 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 positive incidents for the user.
- Incidents created by the user.
- Incidents created by a response manager on behalf of the user.

Non-COVID-19 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.

Completing isolation updates

Users can be placed into isolation manually by response managers, or automatically if they report that they have been diagnosed as COVID-19 positive. 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 a **COMPLETE ISOLATION UPDATE** section on their home 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**.

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.
    - **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 cancelled, 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 cancelled.

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, Facilities, 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`
Configuration Managers	Configuration managers can tailor the application to suit the organization's needs without seeing user data.	`Workforce Safety Configuration Managers`

See the Groups Reference Page for more information on which groups have access what content in Workforce Safety.

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.

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

All Incidents tab

The first page that displays when you log in to the Response Hub is the **ALL INCIDENTS** tab. This tab lists all incidents that have been reported.

On this page you can:

1. Search and filter the incidents list.
2. Export the list to Excel.
3. Save and manage your filters.
4. Refresh the list.
5. Report an incident.
6. View an incident.
7. Update an incident.

Incidents Report tab

Go to the **INCIDENTS REPORT** tab to monitor the health of your incident processes.

This report shows:

1. Incident metrics.
2. Incident statistics.
3. Incidents by location bar graph.
4. Recent incidents by month line graph.
5. A searchable list of incidents.

Clicking an incident location in the bar chart displays the incidents for that location in the **Incident Details** list.

Note that since COVID-19 positive incidents created after v6.0 of Workforce Safety don't have an urgency, they aren't included in the bar chart.

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 report

The **PASS REQUESTS** report shows all of the pass requests that have been submitted.

You can do the following on this report:

1. View pass request statistics.
2. View the logic that is used to determine how the **Status Pending**, **Isolated**, **Qualified**, and **Not Qualified** statuses are determined by clicking **Pass Eligibility Logic**.
3. View the logic that is used to determine whether or not someone is granted a pass to return to the workplace by clicking **Facility Pass Generation Logic**.
4. Export the list to Excel.

5. Save and manage your filters.
6. Refresh the list.
7. Search and filter the list of pass requests.
8. Request a pass on behalf of a user.
9. Schedule a visit for a visitor.

Surveys report

The **SURVEYS** report displays all of the surveys that have been submitted.

You can do the following on this report:

1. View survey statistics.
2. Filter the list of surveys.
3. 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**.

Isolation report

The isolation report shows all of the isolation updates that have been submitted.

You can do the following on this report:

1. View how many users are in isolation.
2. Filter the list of isolation updates.

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.

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 Acknowledgement 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 option 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.

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.

View and manage your people

The **PEOPLE** page displays all users that have interacted with 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.

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:
    - Position: Full-time remote or Office based.
    - Can you work from home?
    - Department.
    - 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, if the user 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.

Amy Lee

REQUEST PASS

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

Tuesday, Sep 15, 2020
Wednesday, Sep 9
Tuesday, Sep 8
Monday, Sep 7
Sunday, Sep 6

« ‹ **1 - 5** of 6 › »

Pass Request

Facility: Appian HQ 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) of, 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**

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 catagories 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.

View your facilities

The **FACILITIES** page displays a filterable list of all of your facilities. Depending on the access of your group, you can also **MANAGE FACILITIES** from this page.

Name	Description	Location	Country	State / Province	Status	Info
Appian HQ	7950 Jones Branch Dr, McLean, VA 22102	Tysons Corner, VA	United States	Virginia	Open	8am - 5pm
Appian UK (EMEA HQ)	24 Martin Lane, London, EC4R 0DR	London, UK	United Kingdom	-	Open	9am - 5pm
Boston Office	77 Sleeper St, Boston, MA 02210	Boston, MA	United States	Massachusetts	Closed	Boston office closed due to local regulations
Denver Office	1550 Wewatta Street, Denver, CO 80202	Denver, CO	United States	Colorado	Open	8am - 5pm
New York Office	135 Madison Avenue, 4th Floor, New York, NY 10016	New York, NY	United States	New York	Closed	NYC location closed due to local regulations

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.

Follow the instructions in the Configuration Guide to configure the site.

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.

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.
    - **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. Got to the Facilities 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.
    - **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**.

> 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.

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**.

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.

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

COVID-19 positive incidents

COVID-19 positive incidents are essential to managing your COVID-19 response. Response managers must be made aware of people diagnosed with or exposed to 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 placing people into and out of isolation.
- Providing an easy way to notify, isolate, and request tests from exposed people.

- Providing an easy way to update affected facilities and areas.

How COVID-19 positive incidents are created

Users and response managers can create COVID-19 positive incidents manually by selecting **COVID-19 POSITIVE INCIDENT** when they create an incident.

A COVID-19 positive 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 positive incident.

- By submitting a positive COVID-19 test result.
  - **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 positive incidents affect users

Contact tracing

When a COVID-19 positive incident is created, all of the people that the user reported having contact with during the past 14 days is displayed to response managers 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.

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

Automatic isolation

Whether the COVID-19 positive 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 be asked to complete isolation updates.

Only one COVID-19 positive incident at a time

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

When a COVID-19 positive 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 positive 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 positive incident open at a time because their older incidents will remain open.

Responding to COVID-19 positive incidents

Generally, the flow that response managers will take when responding to COVID-19 positive 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 positive 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 positive incident:

1. Find and open the incident on the Incident page.
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**.

Managing the impacted user

When you manage a COVID-19 positive case, you may want to remove the user from isolation manually, manage test requests, or close the user's primary facility. COVID-19 positive 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 positive incident, go to the **Summary** tab.
2. To manage test requests for the user, click **REQUEST A TEST**, **VERIFY RESULTS**, or **VIEW REQUEST** depending on the test request status of the user. You can also click the Testing Status card to go directly to the user's test record, if it exists.
3. 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 positive 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.

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 that there is a COVID-19 positive 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 positive 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.

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

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:

1. In the COVID-19 positive 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**.

Reopening closed incidents

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

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 positive 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 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.
    - **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**.
   - **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 positive 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.

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 *

Sample of users

Batch Description

Example: Someone who works in the main building tested positive

Randomly Sample From Selected Users? *

(•) Yes ( ) No

Random Sampling Percentage *

30

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 *

You can reach out to your healthcare provider to understand testing options that may be available to you.

BACK CANCEL NEXT

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 **ACIVITY** 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.

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

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.

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

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

Request	User	Request Name	Request Status	Test Requested On	Sample Collection Date	Result	Lab Result
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**.

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

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**.

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

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.

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 positive 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.

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 positive 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 positive 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.

Configuration Guide

Introduction

With Workforce Safety, business users are empowered to configure the site options from the Configure page, which allows them to make the following changes:

- Manage site features.
  - This includes toggling certain site features, such as the ability to request passes for the next day and the option to require users to log their contacts before requesting a pass.
- Set up the Workforce Safety homepage.
  - This includes changing the branding of the site and updating the helpful links and policy documents.
- Configure user options.
  - This allows you to manage some of the options that users will see when they use Workforce Safety, such as the list of facilities, areas, departments, cohorts, and volunteer and incident options.
- Set up the questionnaires.
  - This includes configuring questions for surveys, pass requests, and isolation updates, as well as managing the guidelines that can be displayed to users when they select certain question responses. You can also preview the pass request structure.
- Update standard messaging.
  - You can update the default messages that are displayed when a user is in isolation and when sending a request for a COVID-19 test.
  - Configure options to automatically remove users from isolation.
  - Manage group membership, which determines what users can see and do in the Response Hub.

This page describes how response managers can configure Workforce Safety from the **CONFIGURE** page on the **Response Hub**.

> Users who are only in the **Workforce Safety Users** group do not have access to the Response Hub. Access for users who can see the Response Hub will be restricted to only the actions that they need to perform. 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.

Manage site features

Some features of Workforce Safety can be turned on or off. Response and configuration managers can toggle them off and on using the Manage Site Features option.

This section describes the features that can be toggled, as well as how to turn them on or off.

Toggling features

To turn features on or off:

1. Click **MANAGE SITE FEATURES**.
2. Click the toggle icon to make the feature active or inactive.
3. Click **SAVE CHANGES** and confirm that you want to make the change.

Manage Feature Options

Use this form to manage the features of the site according to your organization's requirements.

Active	Site Feature	Description
○	Community Volunteering and Help Requests	When toggled on, allows internal users to create community help requests or sign up as volunteers for community help
●	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.
●	Pass Requests Disabled by Active Survey Incidents	When toggled on, requires response managers to close incidents that are created from a survey before the affected user can request a pass. If toggled off, incidents created from survey responses have no effect on requesting a pass.
●	Pass Requests Disabled by Active Pass Request and COVID-19 Positive Incidents	When toggled on, requires response managers to close pass request and COVID-19 positive incidents before the affected user can request a pass again. If toggled off, pass request and COVID-19 positive incidents have no effect on requesting passes.
●	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.
●	Next Day Pass Requests	When toggled on, users can request a pass for the following day
●	Contact Reporting When Requesting a Pass	When toggled on, when an internal user requests their first pass of the day, they will be asked to verify or update the people and areas that they had contact with recently.
○	Enforce Area Capacity Restrictions	When toggled on, internal users must select an area when requesting a pass, and they can only receive a pass for an area that has not yet reached capacity for the given day. All facilities must have areas configured in order for internal users to request passes to them.
○	Cohort Management	When toggled on, response managers and configuration managers can create cohorts to associate departments with specific days of the week, only allowing internal users to receive passes on the days associated with their department's cohort.
●	Contact Reporting on Landing Page	When toggled on, allows internal users to log the people and areas they had contact with recently from the landing page after they have received their first pass
●	Prepopulate Questionnaire Answers	When toggled on, questionnaires are prepopulated with a user's previous answers. If toggled off, performance may be impacted.

CANCEL SAVE CHANGES

Community Volunteering and Help Requests

What is it?

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.

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.

Additionally, in the **Response Hub**, past help requests and volunteer information will still be visible in the **COMMUNITY HELP** tab.

User Incident Creation

What is it?

This feature allows users to report an issue to response managers by creating an incident.

What does toggling it off do?

If you prefer to turn this feature off, the report an 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 has no effect on creating incidents based on responses to pass requests, surveys, or isolation updates or on the ability of response managers to create incidents.

Pass Requests Disabled by Active Survey Incidents

What is it?

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.

What does toggling it off do?

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

Pass Requests Disabled by Active Pass Request or COVID-19 Positive Incident

What is it?

When pass request questions are being configured, certain responses can be configured to automatically create an incident to alert response managers. Additionally users can create COVID-19 positive incidents to report a positive diagnosis.

When this feature is toggled on, response managers must close any pass request or COVID-19 positive incidents before the affected user can request a pass to return to the workplace.

What does toggling it off do?

If toggled off, users can request a pass even if they have an active pass request or COVID-19 positive incident.

Email Notifications for Incident Creation

What is it?

You can use this toggle to control whether or not to send an email to all members of the **Workforce Safety Response Managers** group whenever an incident is created.

What does toggling it off do?

If toggled off, response managers will not receive an email when a new incident is created.

Email Notifications for Incident Updates

What is it?

You can use this toggle to control whether or not to send an email to all members of the **Workforce Safety Response Managers** group whenever an incident is updated.

What does toggling it off do?

If toggled off, response managers will not receive an email when a new incident is updated. The assignee of the incident will still be notified.

Next Day Pass Requests

What is it?

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

What does toggling it off do?

If 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.

Contact Reporting When Requesting a Pass

What is it?

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, before completing the pass request questionnaire, users will be required to either review the contacts they have logged for the last two days they visited a facility, or log their contacts for those days if they haven't already done so.

What does toggling it off do?

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.

Enforce Area Capacity Restrictions

What is it?

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.

Area Name	Area Status	Facility	Facility Status	Daily Capacity
First Floor Lounge	Open Closed	New York Office	Open	5
First Floor	Open Closed	New York Office	Open	20
Second Floor	Open Closed	New York Office	Open	20
First Floor	Open Closed	Boston Office	Open	40
Second Floor	Open Closed	Boston Office	Open	60

Add Area

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.

What does toggling it on do?

> 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 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.

If areas are not configured for a facility, they will not be able to request a pass for that facility.

Cohort Management

What is it?

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.

What does toggling it on do?

After you toggle on **Cohort Management**, a new **COHORTS** option is available on the **CONFIGURE** page. A default cohort is created which contains all departments and allows pass requests for all days. You can modify this cohort and create new cohorts by managing cohorts.

> 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."

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.

Prepopulate Questionnaire Answers

What is it?

Some organizations may want users to enter in their pass request answers manually each time they fill out a questionnaire. Other organizations may want the user's previous answers to be populated 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.

What does toggling it off do?

If 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.

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 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-cor	✕

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 .

Configure facilities

Response managers, facility managers, and configuration managers can specify each facility, including their description, city, whether they are open or closed, and other information.

If you made a mistake when entering a facility and would like to remove it from the list of facilities, you can deactivate it. This is different than updating the facility status to closed, which indicates that the facility is closed temporarily.

When you deactivate a facility, the following happens:

- Deactivated facilities will not show up as an option to select in any pass requests moving forward.
- Existing passes will continue to have the deactivated facility.
- Deactivated facilities still show up in pass request reporting.

To update facility information:

1. Click **FACILITIES**.
2. Add the city, country, and state or province for each of your facilities and click **NEXT**.
3. To deactivate a city, toggle the active icon to inactive . Before you can save your changes, you must update any facilities that have a deactivated city selected.

4. Configure each facility by adding the **Name**, **Description** (optional), **City**, **Status**, **Info** (optional), and **Arrival Instructions for Visitors** (optional).
   - **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.

5. To deactivate a facility, toggle the active icon to inactive..
   - Any areas that were configured to use the facility will be deactivated.

- For any departments that were associated with the deactivated facility, the facility will be removed from the **Where should this department report to?** list.

6. Click **SAVE FACILITIES**.

When you update a facility's open or closed status, be sure to update the status for the corresponding 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.

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**.

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**.

Manage cohorts

Cohort explanation

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.

If Cohort Management is toggled on, you can manage cohorts by assigning departments to cohorts and assigning days of the week to each cohort. Users can only request a pass for days that are assigned to their cohort.

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.

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."

Managing cohorts

To manage cohorts:

1. Make sure all of your departments are configured.
2. On the **CONFIGURE** page, click **COHORTS**.
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.

The configured cohorts display on the Manage Cohorts screen.

Configure incident options

Response and configuration managers can configure incident options.

When users fill out the incident form, they can choose a **Type** of incident, as well as the **Incident Location**.

To configure incident locations and types:

1. Click **INCIDENT OPTIONS**.
2. If necessary, rename the existing **Locations** or **Types**.
3. To add a new location for incidents, click **Add Location** and enter a new location.
4. To deactivate a location, toggle the active icon to inactive.
5. To add a new type of incident, click **Add Type** and enter a name for the new type.

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 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.

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	
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	
Add a Guideline	

CANCEL

SAVE CHANGES

Configure questionnaire questions

Workforce Safety contains several types of questionnaires.

- A **pass request** is 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.
- 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.
- An **isolation update** is for someone who is diagnosed with or exposed to COVID-19 and put into the Isolation status by a response manager. Users who are isolated can no longer request passes. Instead, they will be asked to 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.

> **In order to reduce user confusion, make sure you have isolation update questions configured.** If you don't configure them, when users are put into isolation and click the **COMPLETE ISOLATION UPDATE** button, they will see a message that says there are no questions.

The solution comes with default pass request questions to get you started. These questions can't be deleted, but they can be modified or deactivated.

You can configure the following for each question:

- **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, multiple choice, 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 Positive Incident Creation**: For pass request and isolation update questions, whether a certain response to the question indicates that the user is COVID-19 positive and a COVID-19 positive 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 locations, 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.

Viewing and modifying questions

Response and configuration managers can manage questionnaire questions by clicking **PASS REQUEST QUESTIONS**, **SURVEY QUESTIONS**, or **ISOLATION UPDATE**.

Icons next to each question display a quick view of whether the question:

- 🏳: Includes a response that disqualifies the user from returning to the workplace.
- 🔔: Includes a response that creates an incident.
- 🗋: Includes response that requires a file attachment.

You can modify existing questions by clicking the edit icon ✎.

You can also reorder questions using the arrows ↑ ↓. To reorder follow-up questions, click the edit icon ✎ for the question to edit it.

To deactivate a question, toggle the active icon ◐ to inactive ○.

Follow up question limits

Initial questions can have as many follow-up questions as you need. Their follow-up questions can even have their own follow-up questions.

However, a question that is already nested under another question cannot have any follow-up questions.

The image below shows the limit to the number of nested follow-up questions that a question set can have.

Response types

When you create a new question, you can select which response type you want the question to be: **Yes/No**, **Multiple choice**, or **Short answer**.

Yes/no questions will display a simple yes or no option to end users.

For multiple choice questions, you can add and edit numerous choices that a user can choose from. If there are less than five choices, users will select from a radio button list. If there are more than five, they will select from a dropdown list. Only one response can be selected by users.

For short answer questions, users can respond with free text or numbers. Their responses are limited to 255 characters.

Adding a question

> After you save the question you cannot edit the **Question Text** or the **Response Type**. For **Multiple choice** questions, you cannot edit or delete the choices, but you can add choices, reorder them, and inactivate them.

To add a question to the pass request or survey:

1. From the **CONFIGURE** page, click **PASS REQUEST QUESTIONS**, **SURVEY QUESTIONS**, or **ISOLATION UPDATE**.
2. Click **ADD QUESTION**.
3. Enter the **Question**.
    - **Note**: You cannot add a duplicate question.
4. 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.
5. If you would like to include a tooltip for the question, enter the information you would like to display in the **Helpful Information** field.
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

☑ This is a follow-up to a preceding question

Preceding Question *

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

Display when this response is selected *

Yes

Helpful Information

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

148/500

Question Placement

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

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

Response

Type

○ Yes/No ● Multiple choice ○ Short answer

Choices	Require File Upload	Create Incident
Walk	☐	☐
Drive	☐	☐
Bus	☐	☐
Bike	☐	☐

⊕ Add Choice

9. For yes/no and multiple choice 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 the user has been diagnosed with COVID-19 and a COVID-19 positive 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.

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 user positions**, then select the positions.
12. If you want the question to display only for users in a certain location, select **Only show this question to users in certain locations**.
    - To show the question to users in a certain country or state/province, enter the country and, if applicable, the state or province, then click **ADD**.
    - To show the question to users in a certain city that you have a facility located in, select a city, then click **ADD**.
    - Enter as many locations as you require.

13. Click **SAVE CHANGES**.

Activating and deactivating surveys

When you want users to be able to take the survey before they start requesting a pass, activate the survey. When you have collected all of the responses you need and want to disable the survey, deactivate it.

If you deactivate all survey questions, the survey will be automatically deactivated. You must have at least one active question to activate the survey.

To activate or deactivate the survey:

1. From the **CONFIGURE** page, click **SURVEY QUESTIONS**.
2. If you are activating the survey, make sure you have at least one active question. To add questions, see Adding a question.
3. Click **ACTIVATE SURVEY** or **DEACTIVATE SURVEY**.

After the survey is activated the Pass Requests Disabled by Active Survey Incidents toggle displays in the Manage Site Features configuration.

Preview pass request questionnaire structure

Response and configuration managers can preview the pass request structure by clicking **PREVIEW QUESTIONNAIRE**.

In order to see the structure of the pass request by region, you can view the pass request by facilities or by country and state/province. Click the cards to follow the order of questions in the pass request.

The preview shows you the questions in the pass request and their possible responses. A red icon indicates the response disqualifies a user from returning to the workplace.

If a question has follow up questions, those display as well.

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 screen on the homepage, they are asked to complete an isolation update. 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 **ISOLATION UPDATE**.
2. Click **EDIT MESSAGE** and enter your message.
3. 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**.

Modifying 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.

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**.

Configure automated isolation removal

Users are put into isolation automatically when a COVID-19 positive incident is created. Response managers can also put exposed people into isolation manually.

Workforce Safety makes it easy to remove these users from isolation automatically, freeing up response managers to focus their attention on other important matters.

You can set up Workforce Safety to remove users from isolation automatically based on one or both of the following criteria:

- The user has been isolated for a certain number of days.
- The user submits a negative COVID-19 test.

If both criteria are selected, the user will be removed from isolation whenever the first criteria is met.

To configure Workforce Safety to remove users from isolation automatically:

1. From the **CONFIGURE** page, click **AUTOMATED ISOLATION REMOVAL**.
2. Select **Automatically remove a user from isolation when certain criteria are met**.
3. To remove users from isolation after a certain number of days:
    - Select **Employee completes a period of recovery**.
    - Select the number of days that must pass before removing them from isolation.
4. To remove users from isolation based on a negative COVID-19 test:
    - Select **User receives a COVID-19 test request and provides a negative result**.
    - Select the number of days that must pass before sending the test request.
        - **Note**: If **Employee completes a period of recovery** is selected, the number of days entered here must be less than the number of days selected for **Recovery Period**.
    - Select whether or not you want to require a response manager to verify the test results.
        - **Note**: If you select **Required**, users will remain in isolation until a response manager verifies their test results.
5. Click **SAVE CHANGES**.

When a user is removed from isolation, either automatically or manually, if they have a COVID-19 positive incident, the incident will be closed automatically.

Isolation countdown

When a user is placed into isolation and automated isolation removal is configured, a countdown begins that determines when they are removed from isolation (recovery period) and/or when they will be sent a test request. This countdown starts over whenever there is an indication that the user has been diagnosed as positive for COVID-19. For example, if a close contact is placed in isolation on Monday and they submit a COVID-19 positive test on Friday, their isolation countdown starts over.

Keep in mind that even though a user can have only one open COVID-19 positive incident at a time, anytime Workforce Safety would automatically generate a COVID-19 positive incident, the isolation countdown resets. For example, if they answer a question on the isolation update that creates a COVID-19 positive incident, their isolation countdown will start over.

Add and remove users from Response Hub groups

There are seven different groups for the Response Hub:

- `Workforce Safety Response Managers`
- `Workforce Safety Configuration Managers`
- `Workforce Safety Facility Managers`
- `Workforce Safety Screeners`
- `Workforce Safety Coordinators`
- `Workforce Safety Administrators`
- `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.

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 **GROUP MANAGEMENT**.
2. Select a group from the drop-down list.

3. To add group members:
    - Click **ADD MEMBERS**.
    - Search for the users to add.
    - Click **ADD TO GROUP**, then click **YES, ADD**.
4. To remove group members:
    - Select the user or users to remove.
    - Click **REMOVE MEMBERS**, then click **YES, REMOVE**.

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.

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

Response Hub Information and Actions	Administrators	Screeners	Facilities Managers	Coordinators	Configuration Managers	Response Managers
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			
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

Response Hub Information and Actions	Administrators	Screeners	Facilities Managers	Coordinators	Configuration Managers	Response Managers
Verify test results.						X
Provide test results						X
Cancel test requests						X
View all data on the Community Help report.				X		X
Match with volunteer, reassign, and close help requests				X		X
People page						
View all data on the People page.						X
Request tests.						X
Facilities page						
View all data on the Facilities page.	X	X	X	X	X	X
Manage all facilities, including the open/close status.			X			X
Manage all facilities, except the open/close status.					X	

Response Hub Information and Actions	Administrators	Screeners	Facilities Managers	Coordinators	Configuration Managers	Response Managers
Scan passes in the mobile application.		X				X
Configuration page						
Configure facilities, departments, and areas.			X			X
Toggle the **Community Volunteering and Help Requests** feature option.				X		X
Configure volunteer options.				X		X
Manage all configurations, except facility open/close status.					X	
Manage all other configurations.						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.

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.

Coordinators
Screeners
Daniel Nelson
ISOLATE USER
REQUEST PASS
UPDATE PROFILE
Facility managers
Screeners
Coordinators
Summary
Pass Requests
Isolation Updates
Surveys
Community Help
Related Actions
User Status
Not Qualified
Disqualifying answer(s) to a pass request
Testing Status
REQUEST A TEST
COVID-19 Negative
12 Days
Since Test Result
Open Incidents
North cooridor is out of hand sanitizer
Open
11/12/2020
Active Passes
No active passes
Facility managers
Profile Information
Daniel Nelson
daniel.nelson
example@fake.appian.com
Operations
Office based
Primary Facility
EMEA HQ (UK)
London, UK, United Kingdom
Open
Facility managers
Screeners
Coordinators