# Workforce Safety v8 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 20.4 and may not reflect the interfaces or functionality of other Appian versions.

# Workforce Safety Overview

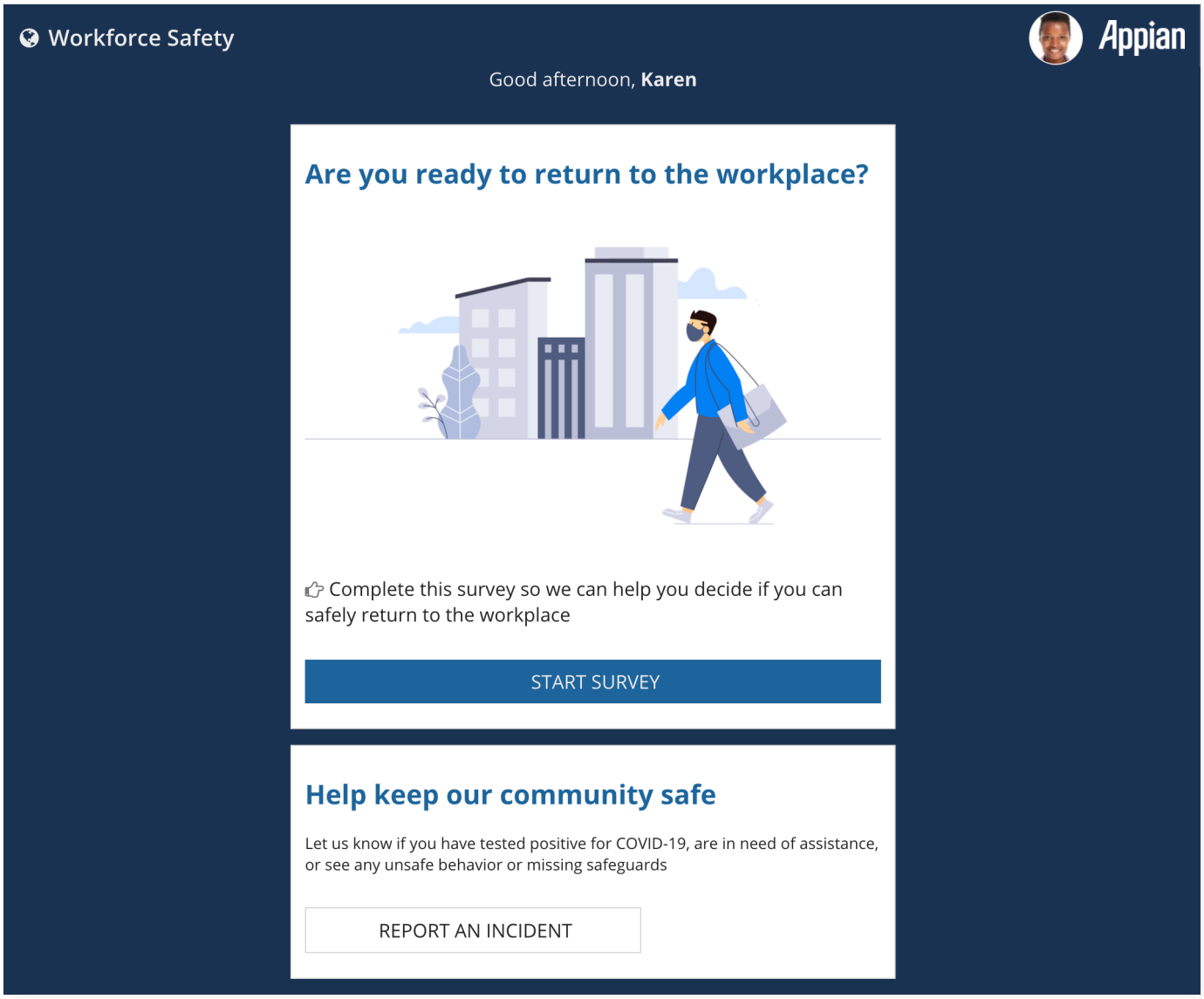
## Helping organizations safely return to onsite work

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, are symptomatic of, or exposed to COVID-19.

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

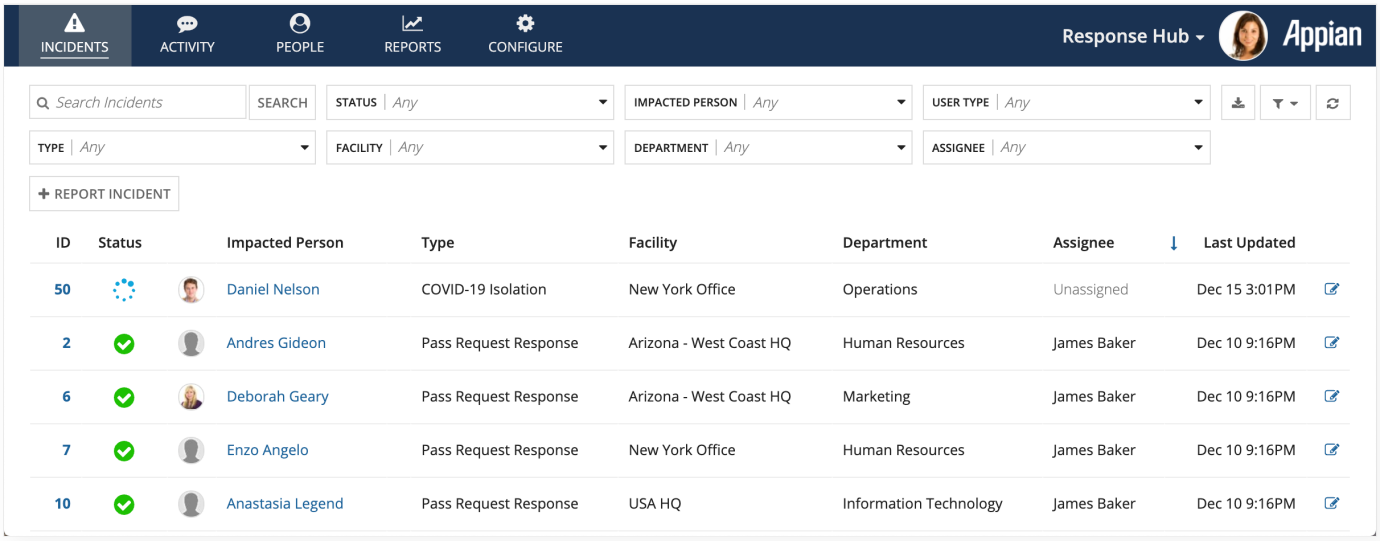



## What does the Workforce Safety solution provide?

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.

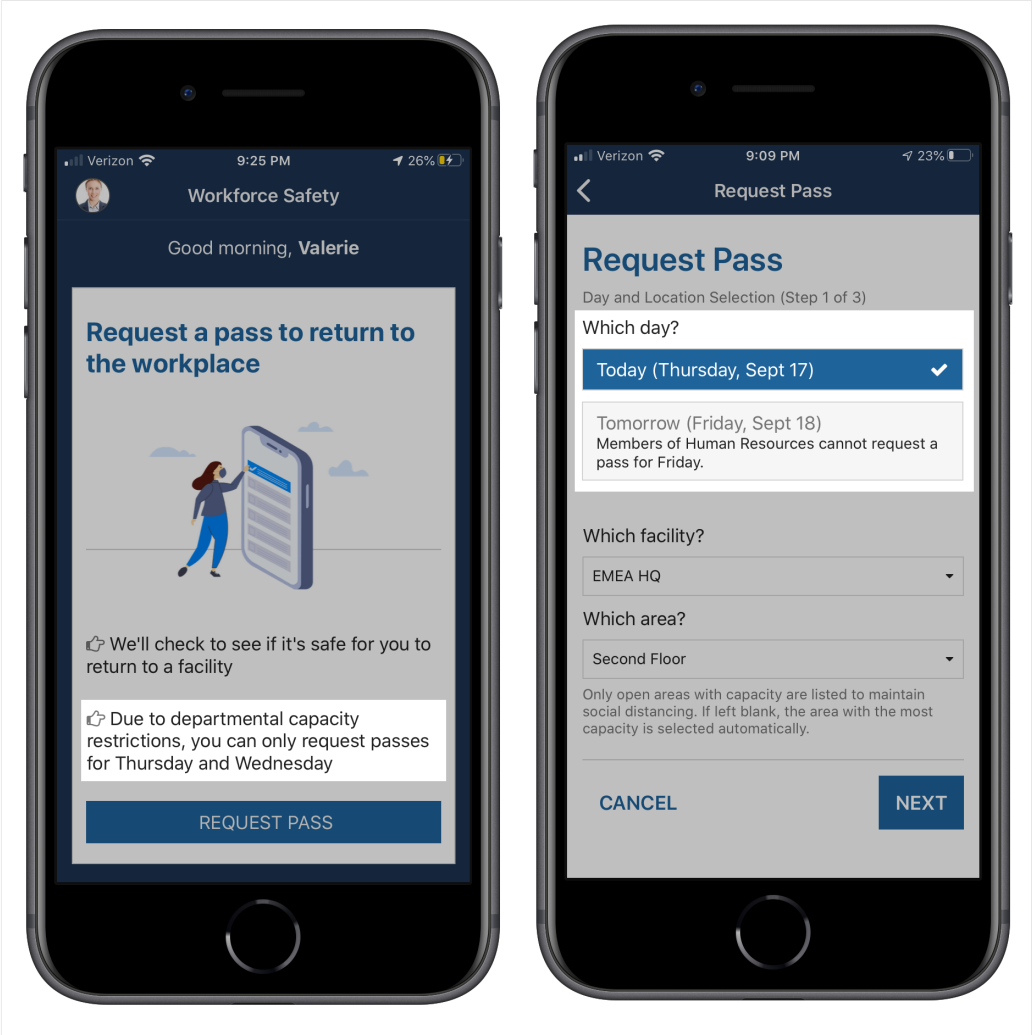



## An automated, phased approach to returning to the workplace

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.

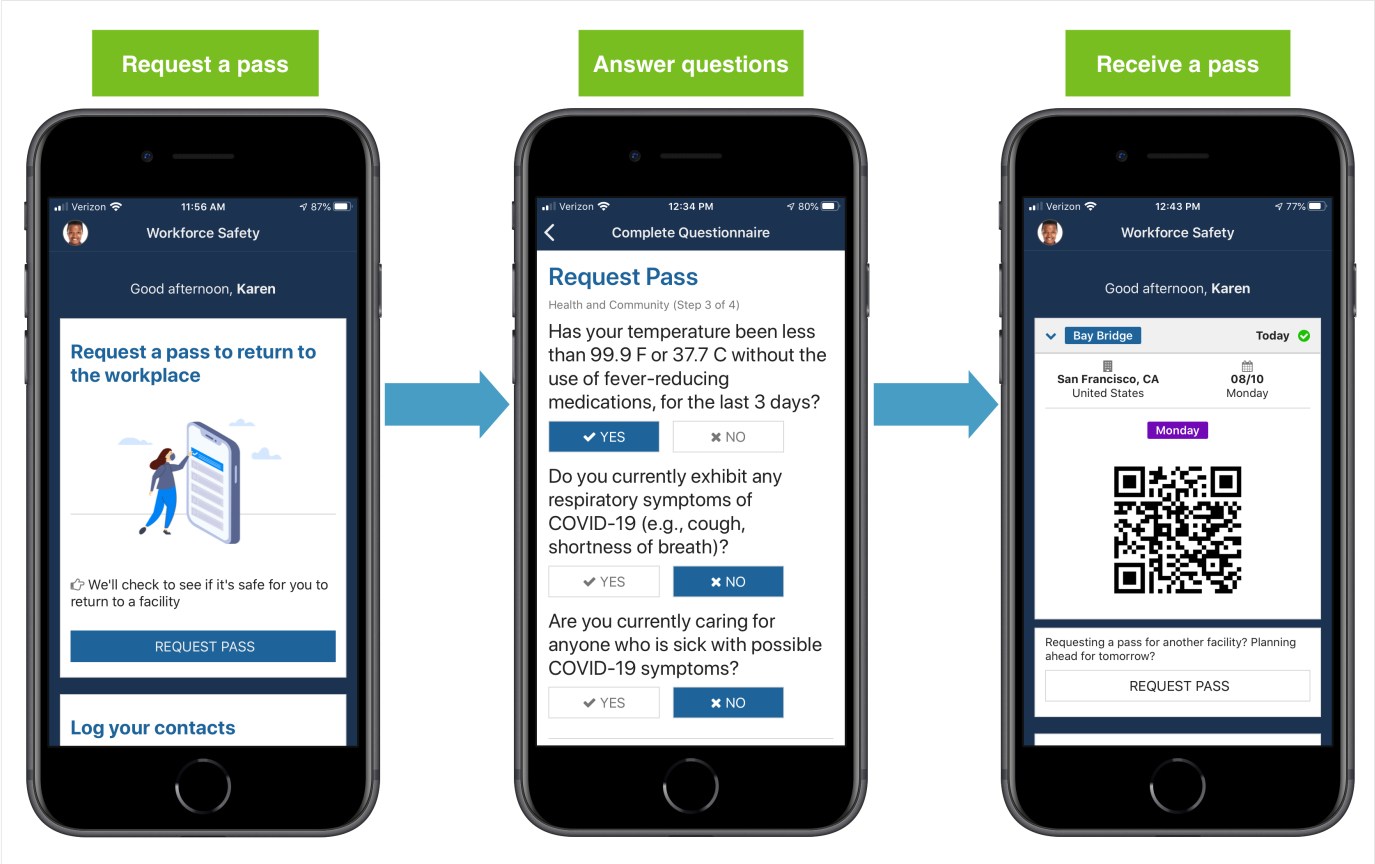



## Fast, easy workforce screening and mobile passes

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

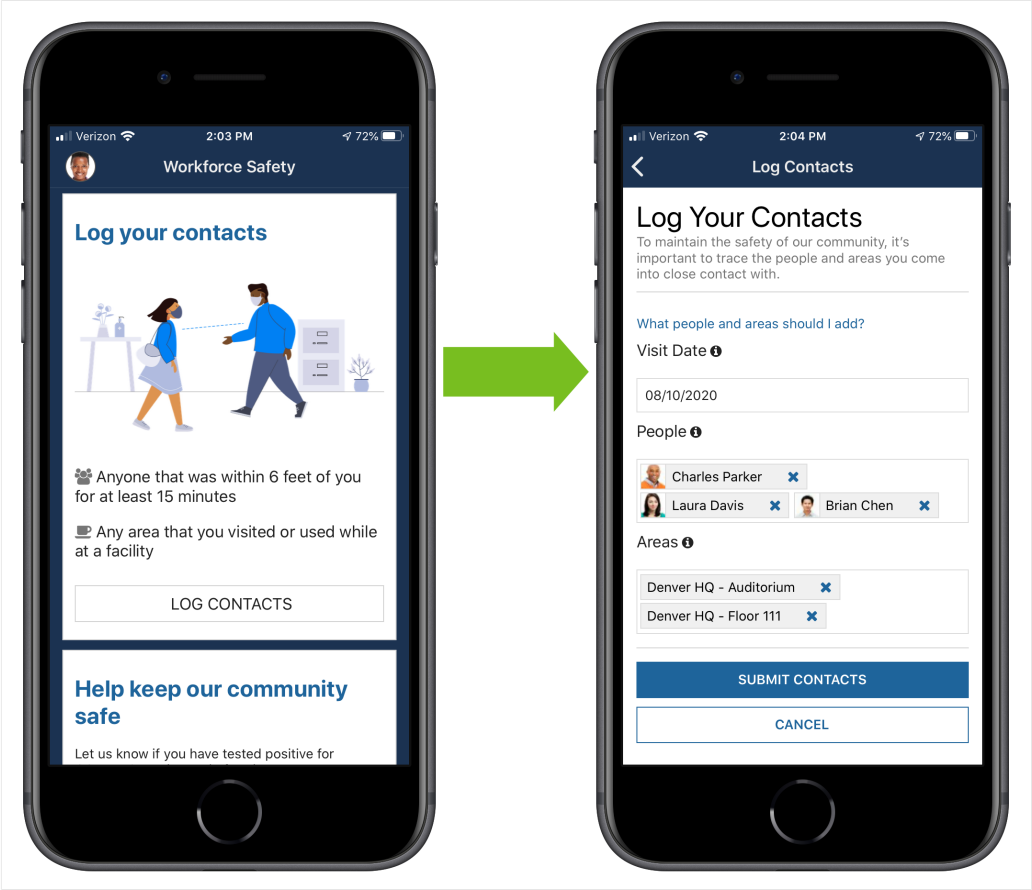
No matter the due diligence of an organization, exposures will inevitably happen. Responding quickly to positive cases is key to preventing and controlling an outbreak.

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.

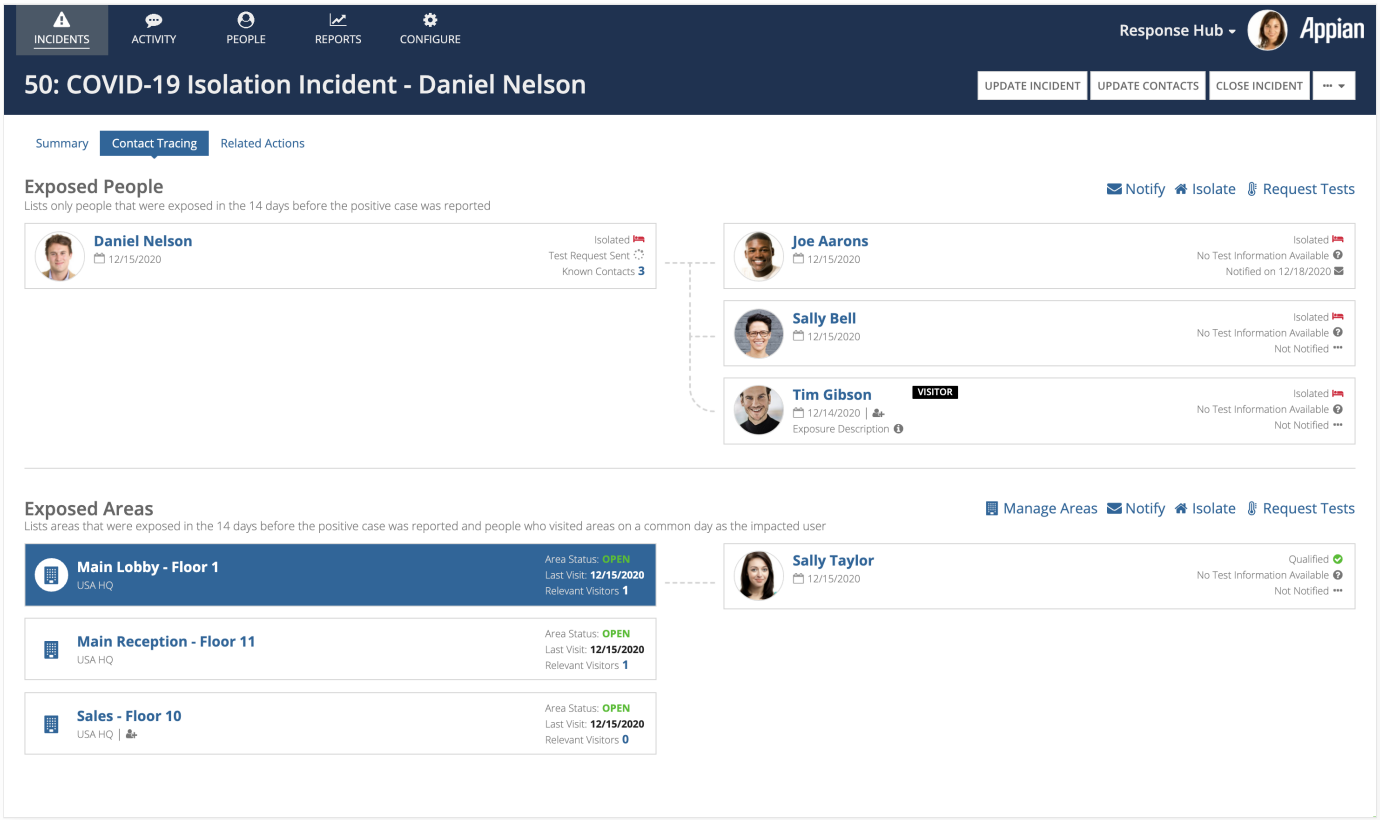



### Actionable data to trace exposed contacts

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

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

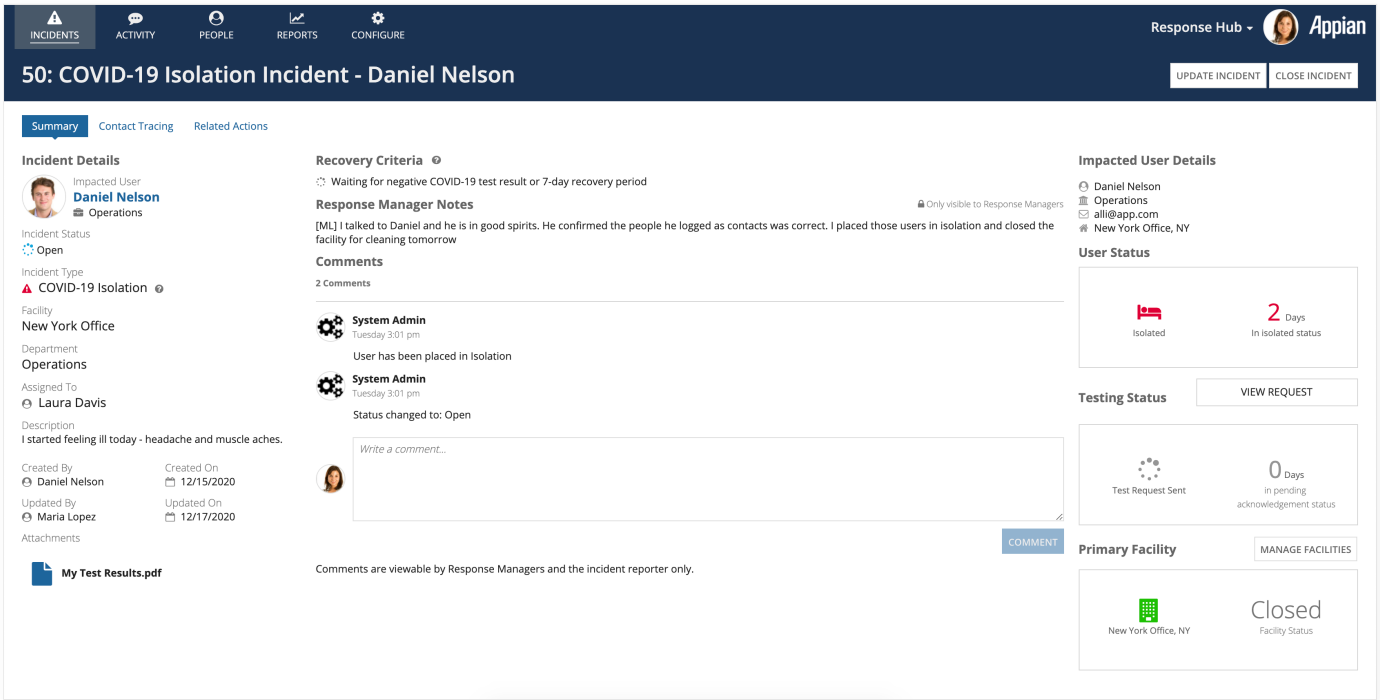
Response managers can then take key actions on exposed contacts, such as notifying them via email, isolating them so that they quarantine, or requesting that they get tested.



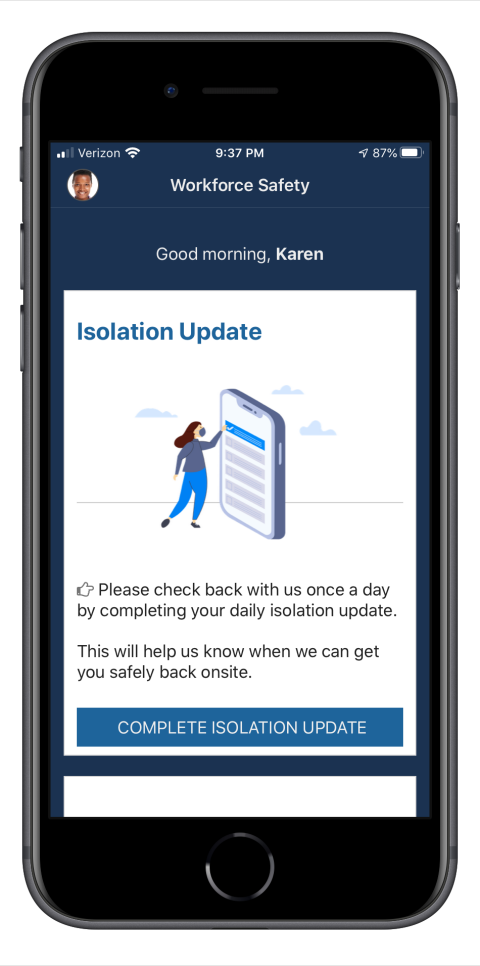

## Isolating workers based on COVID-19 diagnosis, symptoms, or exposure

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

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




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.

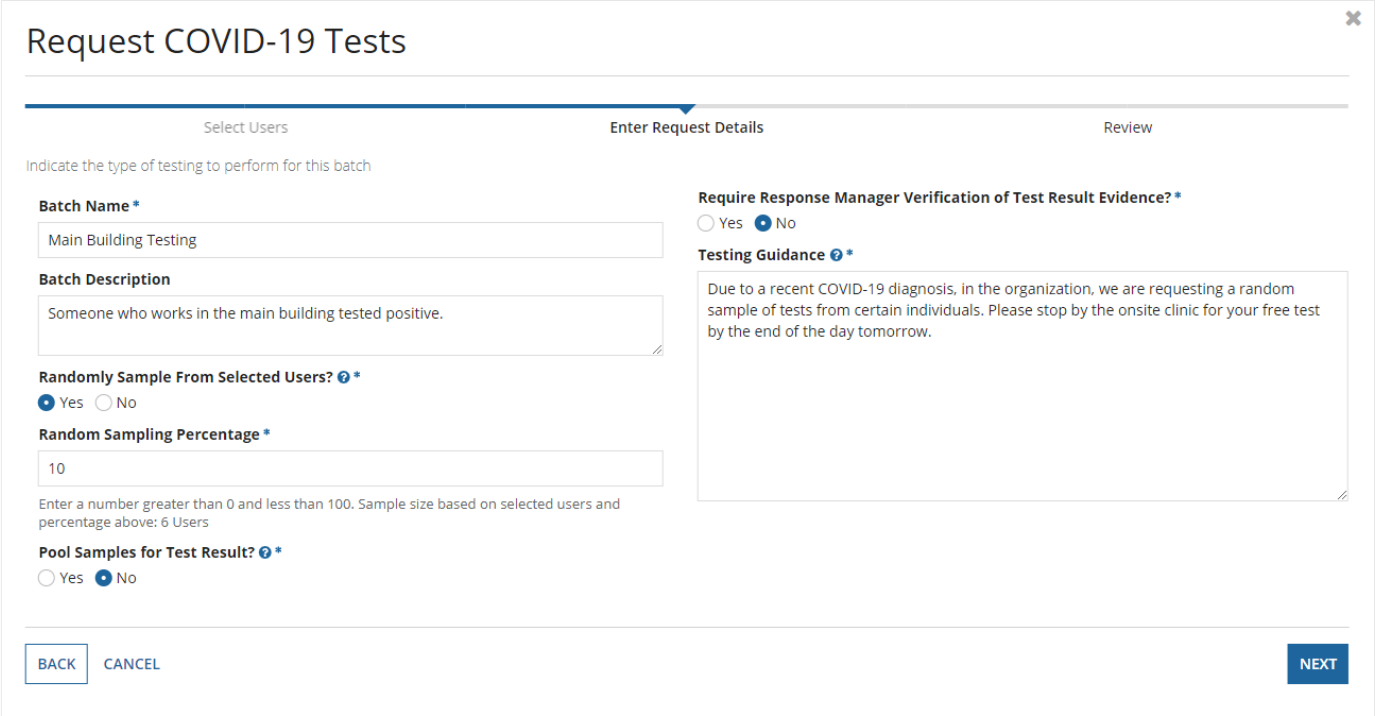



## Overseeing and managing COVID-19 testing

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 8.0 Release Notes

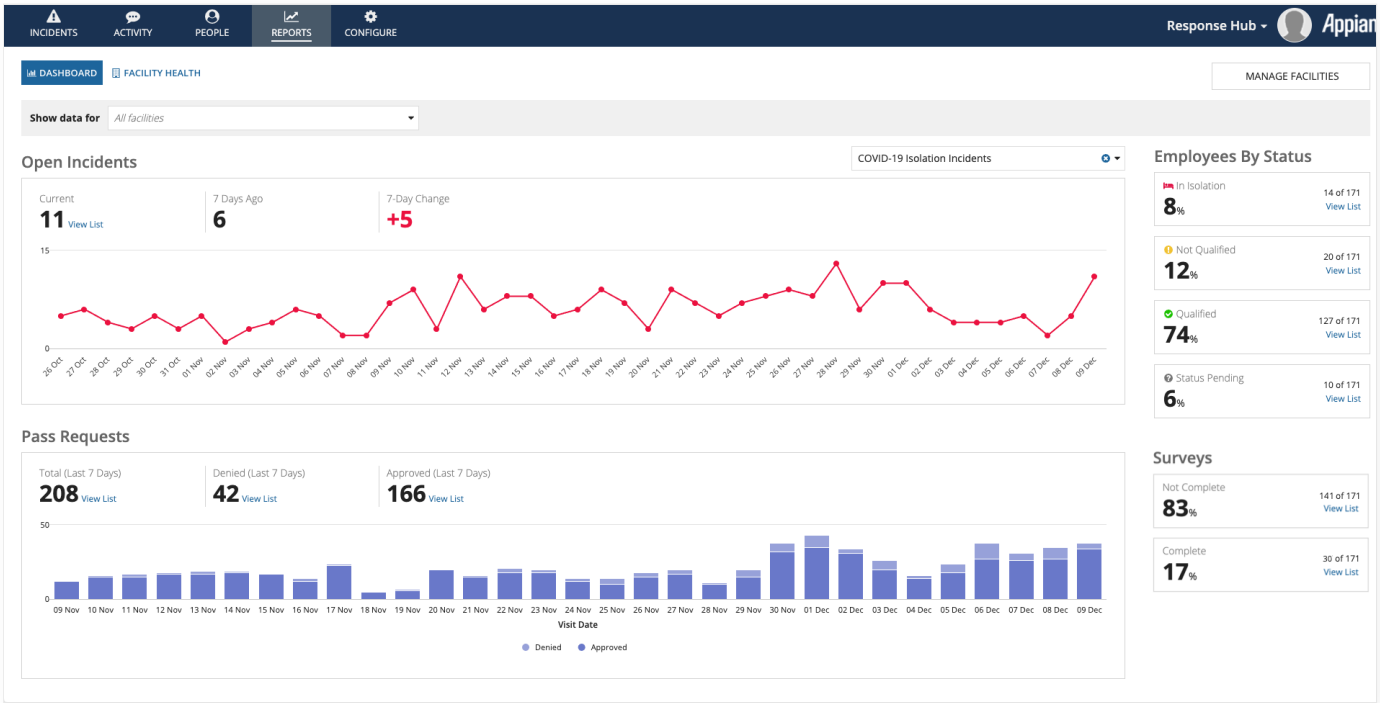
## Insights & Reporting

### New **Reports** Tab

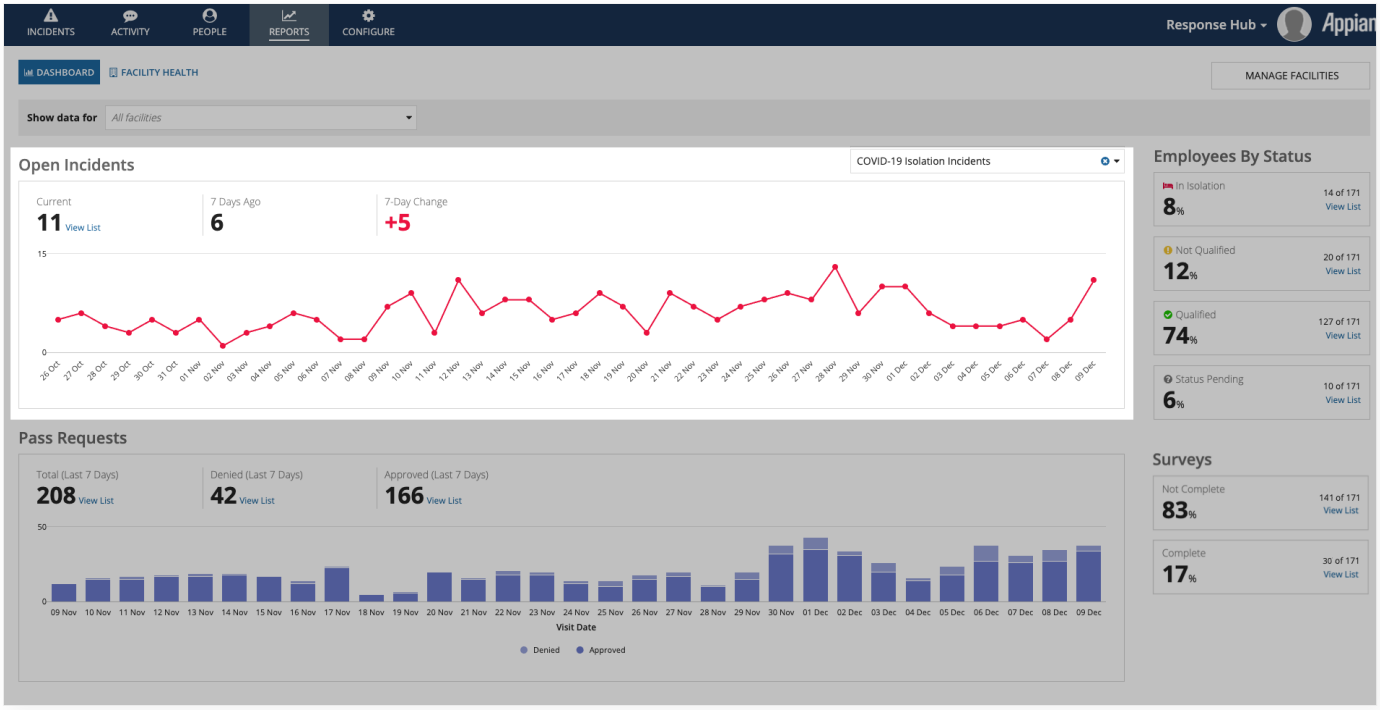
Understanding the health of your organization is vital to establishing an effective and timely COVID-19 response that's based on accurate data. The **Response Hub** now has a new **Reports** tab that allows you to leverage the powerful and robust data in Workforce Safety to quickly analyze the health of your organization. From the **Reports** tab, your Response Managers can quickly access and view incidents, pass requests, surveys, and people data to understand trends in your organization. They can filter the reports to analyze the data for one facility or compare data across multiple facilities to gain a broader understanding of your company's health. Report insights can help you make decisions about closures, re-openings, and operation adjustments so get started using the **Reports** tab today!

### Dashboard Insights: Incidents, People, and Activities

The **Dashboard** page in the **Reports** tab provides important insights on three cornerstones of the Workforce Safety solution: Incidents, People, and Activities. You can filter the data to display metrics for one or more facilities.



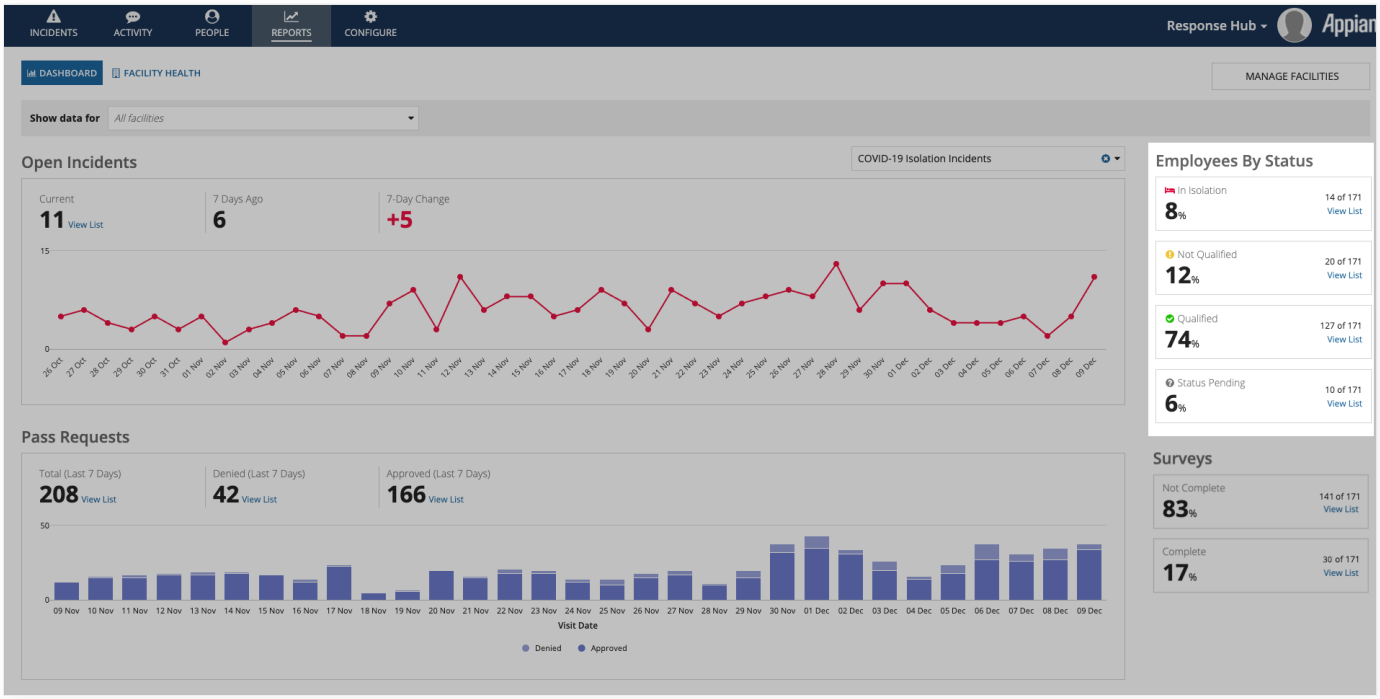

The **Open Incidents** section provides insights on incident trends. The chart below and accompanying KPIs reflect the number of open incidents at a given point in time.



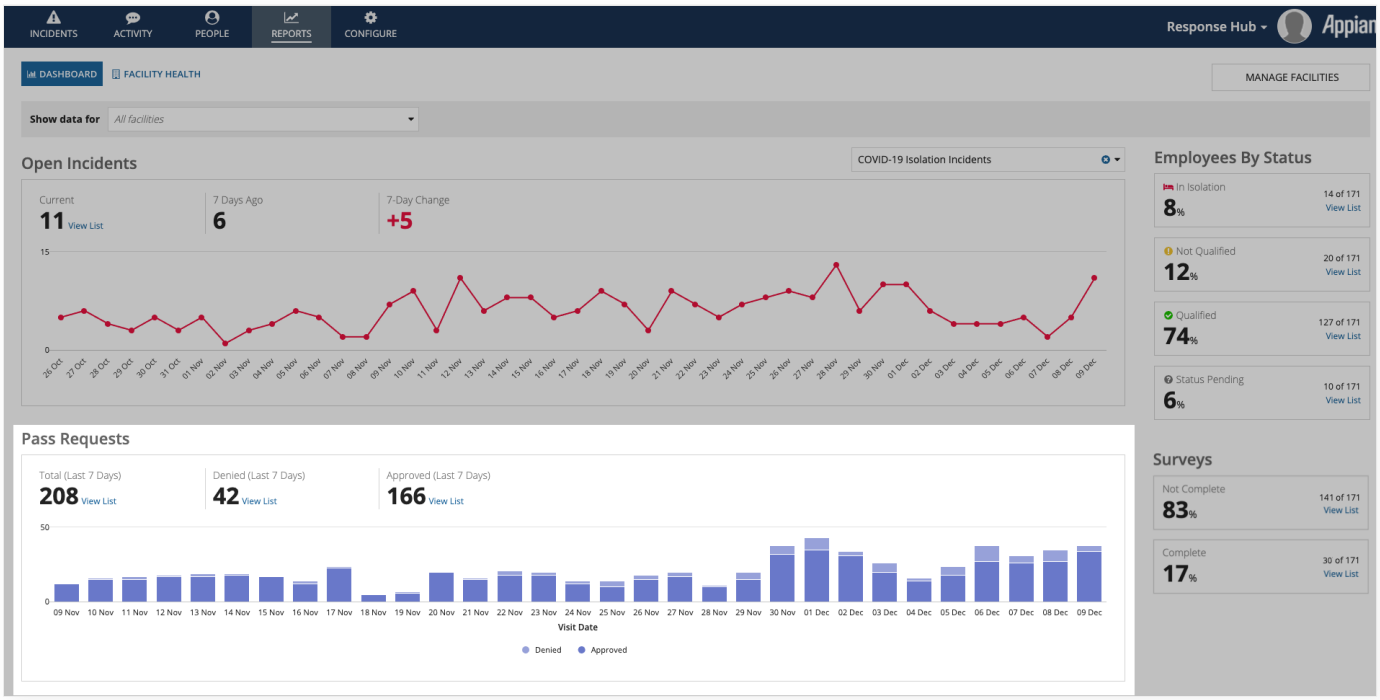

For example, if you close a COVID-19 Isolation incident only after a user has recovered, you can use the **Open Incidents** metric as an indicator for the number of **active** COVID-19 cases.

Want to see the list of incidents behind the incident count? Click **View List** to see a grid of currently open incidents. Use the incident type dropdown to filter the data and track a different incident type. Note that this data will only begin to populate after your upgrade to version 8.0.

The **Employees by Status** section allows you to quickly understand the breakdown of users by their eligibility status. You can identify how many users are in isolation and cannot request a pass or how many users have yet to interact with the solution and are **Status Pending**. To see an exportable list of users behind each number, simply click **View List**. As with all data on this page, you can filter this section using the **Show data for** filter at the top of the page.




The **Pass Requests** section gives you insight into how pass requests are trending over time. From this section, you can identify if pass requests are increasing or decreasing and adjust operations on the ground accordingly. You can also see the breakdown of pass requests by result, denied or approved, to identify how often users are receiving requested passes. To see an exportable list of pass requests, simply click **View List**. You can also filter the data in this section using the **Show data for** filter at the top of the page.



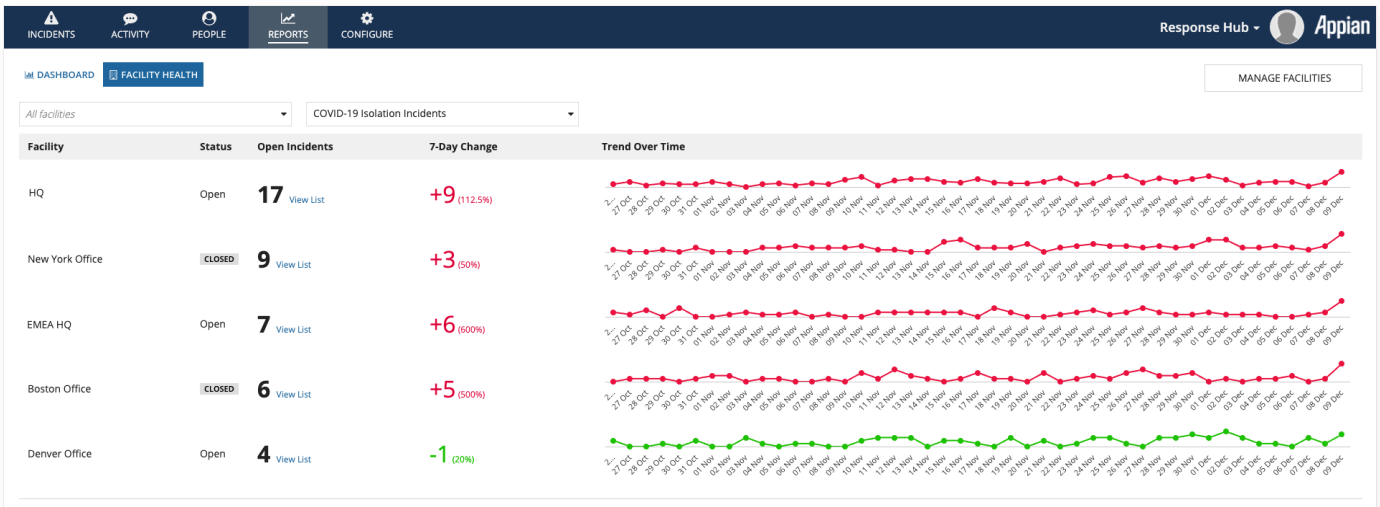

The **Surveys** section helps answer the question **Who has completed the survey?**. You can see how many users in the solution have completed the active survey and how many have not. To see an exportable list of users who have completed or not completed the survey, simply click **View List**. Note that this section will only be visible if there is an *active* survey. Use the **Show data for** filter at the top of the page to filter the data.

## Facility Health: Monitor Incident Trends

The **Reports** tab also has a **Facility Health** page that allows you to monitor the incident trends across facilities. This data will help you identify hotspots and compare data across your facilities. Ranked by number of open incidents, each facility is listed with their status, open incident count, 7-day change rate, and a trend chart to help you understand incident trends. You can use this page to identify facilities that need your attention or need to adjust operations.

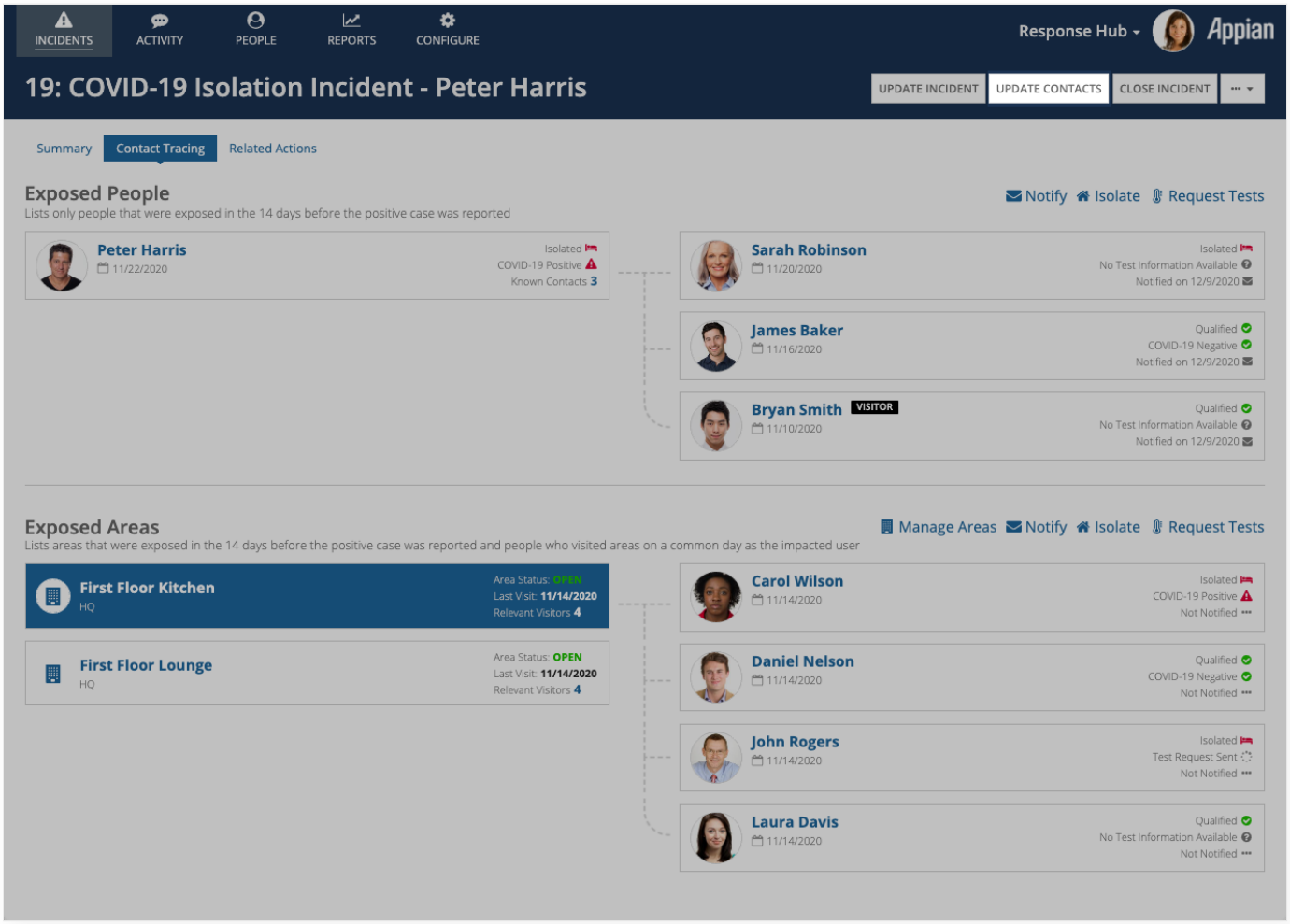
If you are a Response Manager for a specific region, you can use the **Facility** filter to compare trends for the facilities in your region. If you'd like to follow trends of specific incident types, use the incident type filter.

To view an exportable list of incidents behind the open incident count, simply click **View List**. Note that this page will only start populating data after you upgrade to version 8.0.

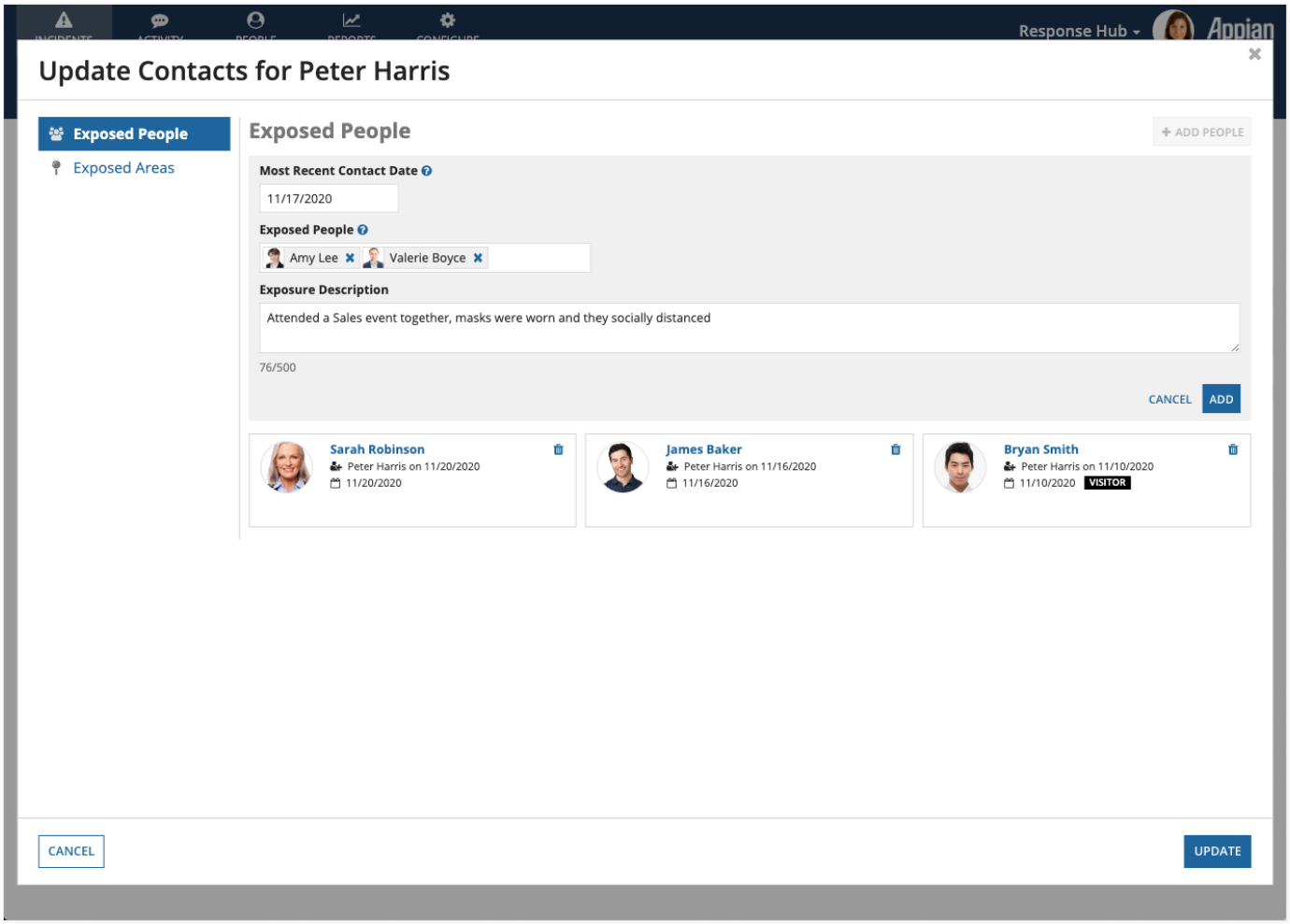



# Add or Edit Contacts for Contact Tracing

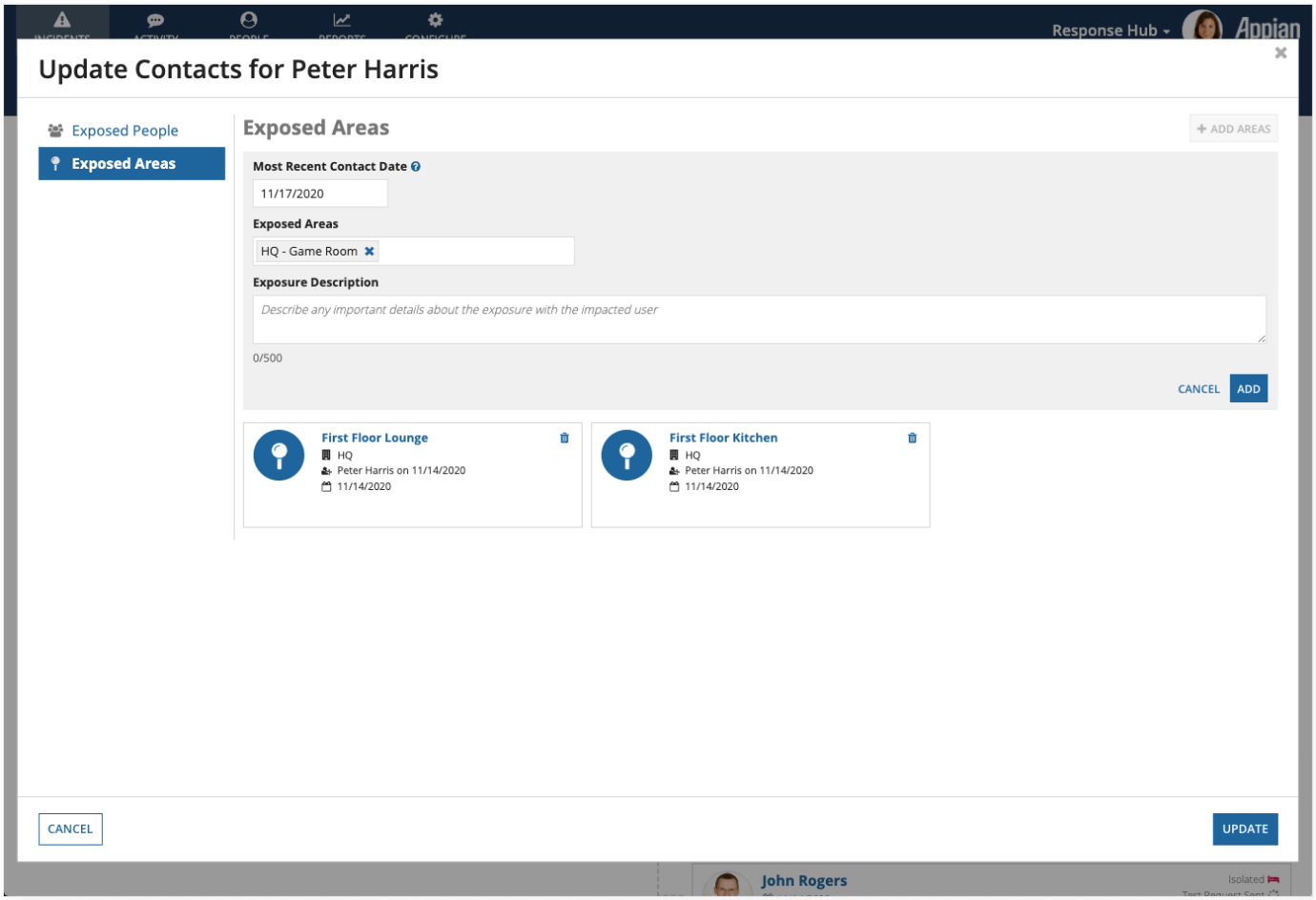
Sometimes you need to add or edit contacts to the **Contact Tracing** view in a COVID-19 Isolation incident. With the new **Update Contacts** action, you can add, remove, or edit people or area contacts for a user.



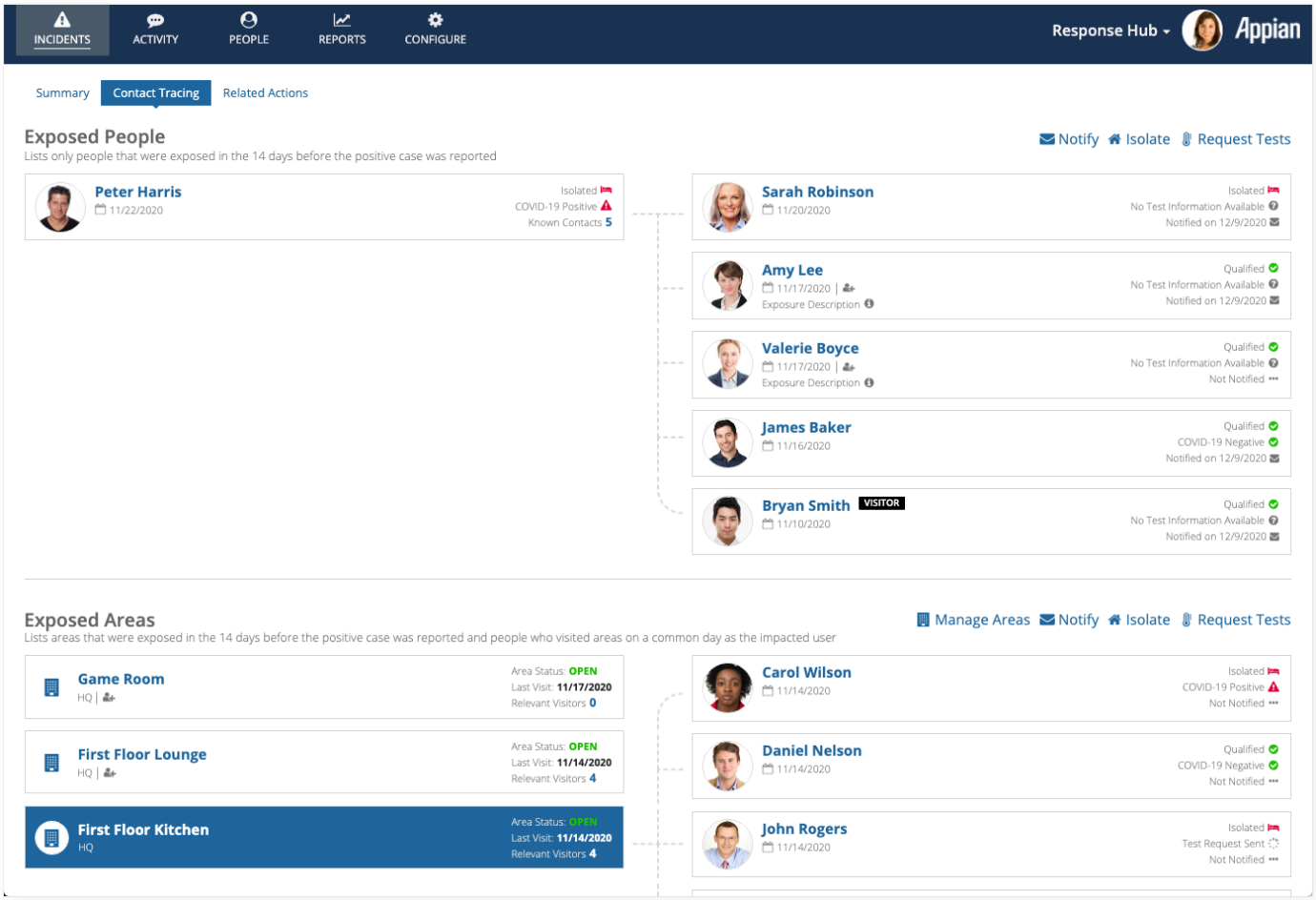

To add a contact, click **Add People** and indicate the date of contact and any exposed people on that date.

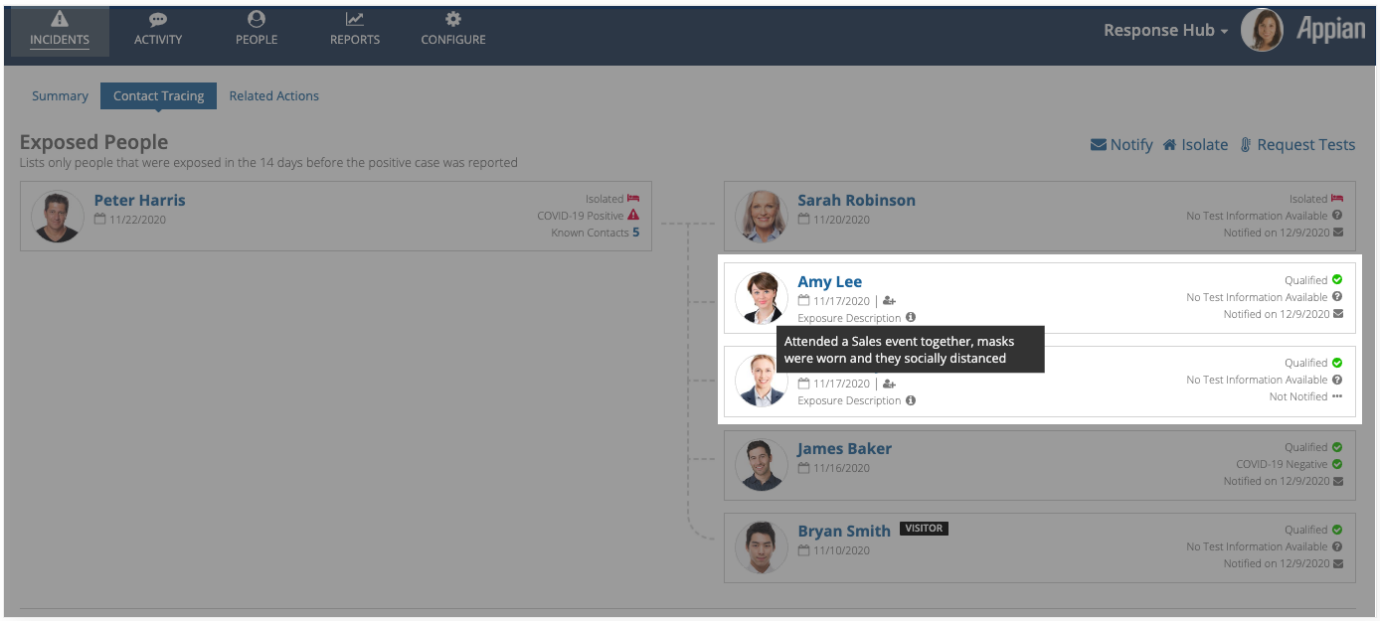



You can also include an **Exposure Description** for each contact to provide more context. This description appears as an icon caption in the **Contact Tracing** view.




For auditing purposes, you can view who added a contact and when. After you submit the form, the **Contact Tracing** view is automatically updated to reflect the user's newly updated contacts.

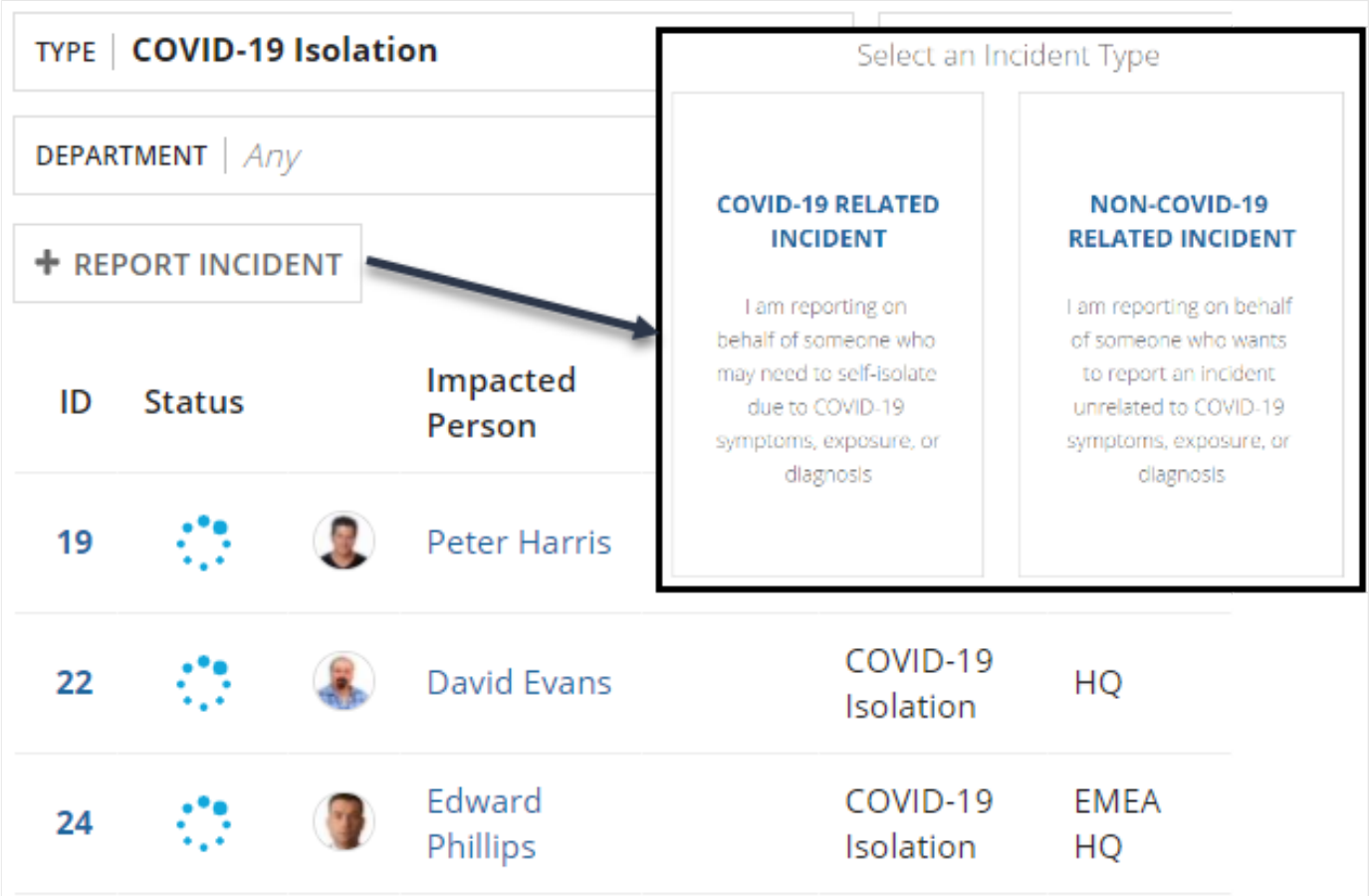



## Expanded reach with COVID-19 Isolation incidents

During this time of global pandemic, we recognize the critical need to identify, isolate, and contact trace individuals who are symptomatic or exposed to COVID-19, in addition to those confirmed COVID-19 positive. To address this need, this release expands the breadth of COVID-19 Positive incidents, the most used incident type, by renaming them COVID-19 Isolation incidents.

Now you can be confident that symptomatic, exposed, or COVID-19 positive individuals are isolated right away and avoid reporting to the workplace.

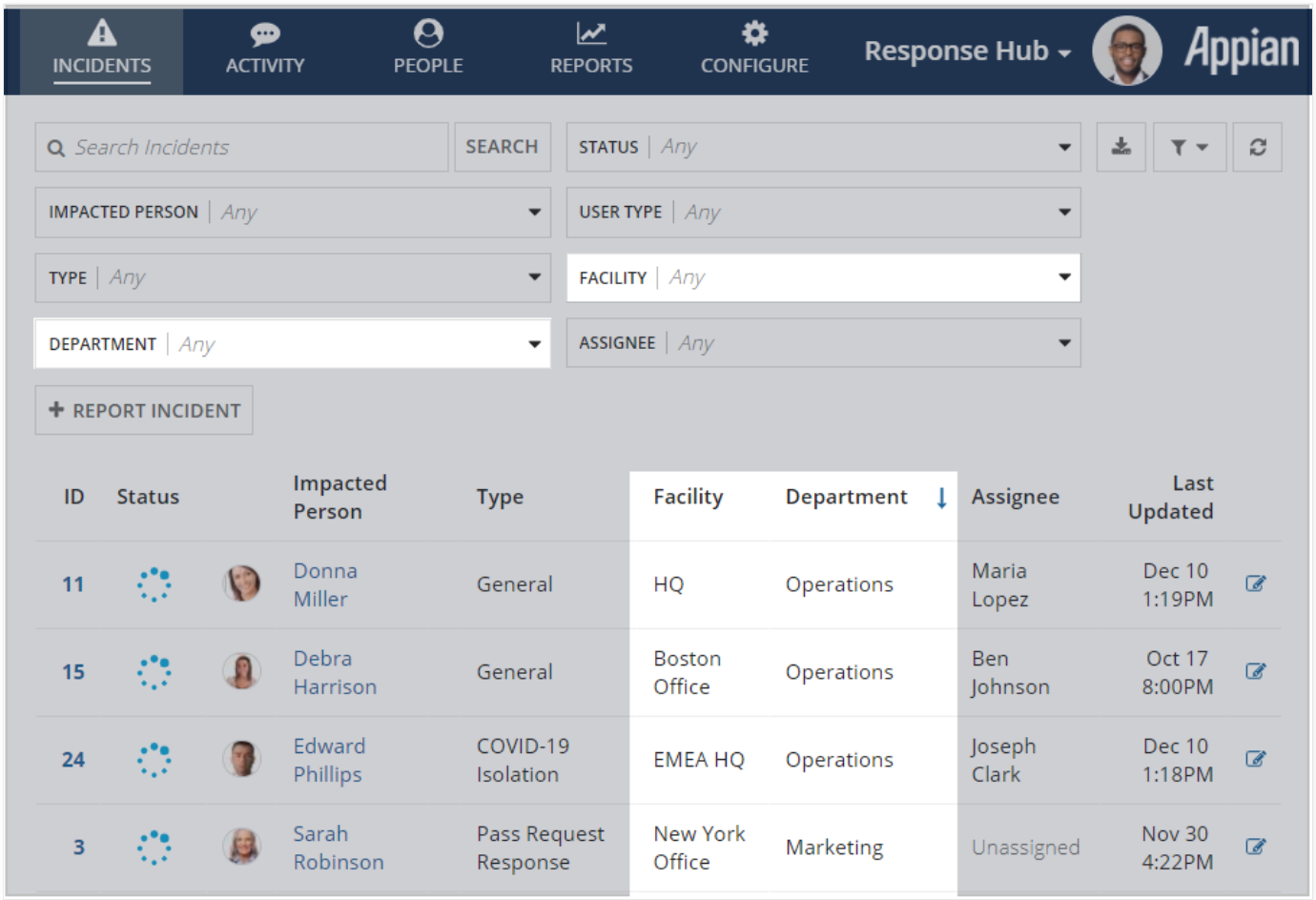



## Tag incidents for a facility and department

Do you have regionalized case management, where each geographic site has its own response management team? This release allows you to attribute incidents to a department and facility so that your Response Managers can easily triage and assign incidents to the right people.

Now your regional or departmental Response Managers can set default filters, which allows them to drilldown to the incidents for their department or facility.

The newly added department and facility data points also boost reporting insights into potential COVID hot spots within your organization.




## Insight into every user

This release adds a people record for each user in the Workforce Safety Users group, regardless of whether the user has a transaction within the system or not. This gives your response management team greater visibility into users that have requested passes for a given site and the current on-site eligibility for all users.

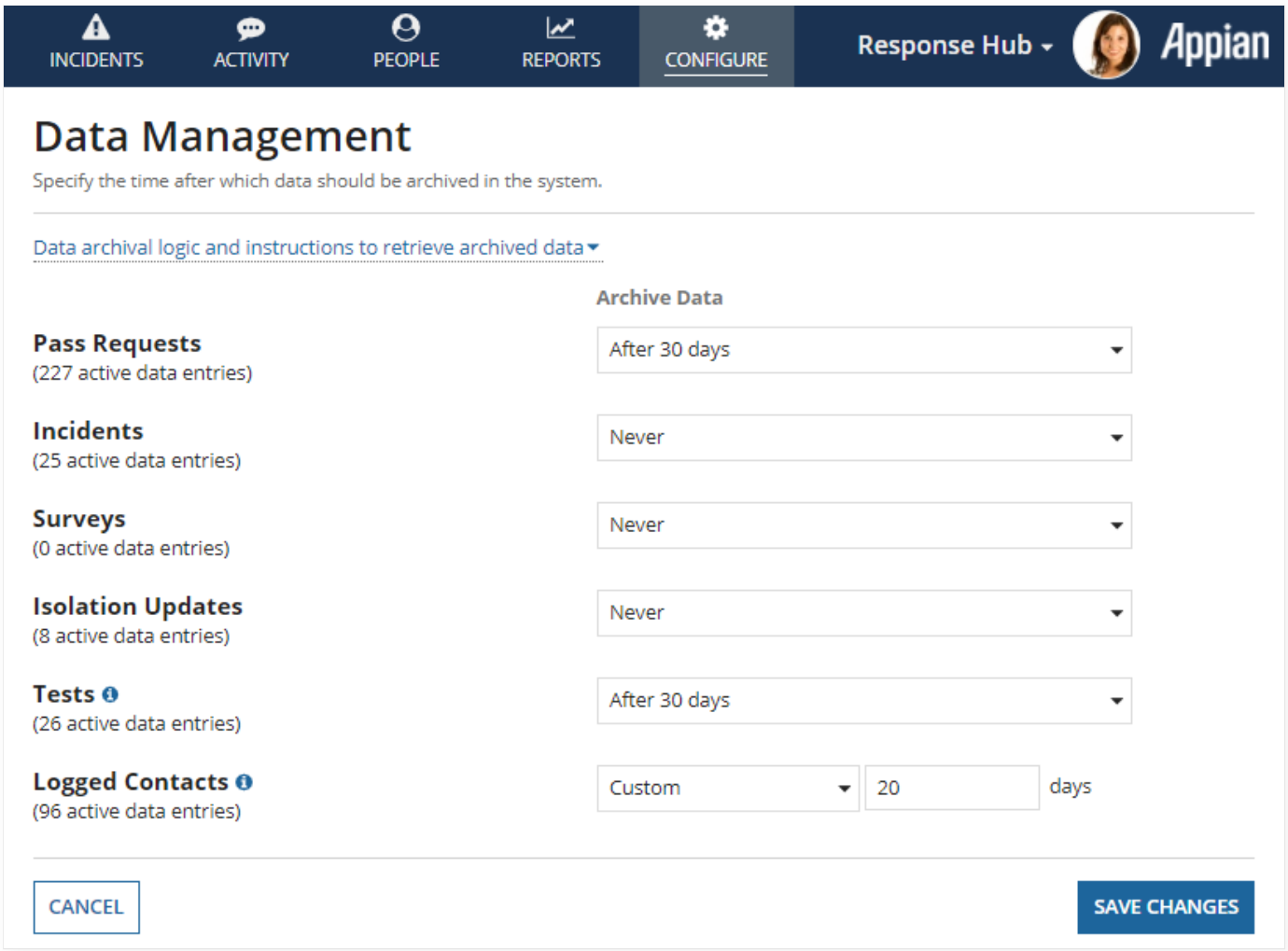
Now you can send COVID-19 test requests to anyone within the organization! This not only furthers testing randomizing, it extends the reach of your testing efforts.

## Control over data archival

For large organizations, daily pass requests and contact tracing logs submitted by employees can cause employee data to quickly pile up. Typically, this type of need-to-know data needs to be readily accessible for incidents that have occurred during the past few weeks.

To keep your pandemic response relevant and speedy, we now allow system administrators to set a cadence for archiving data after a period of time. Pass requests, incidents, surveys, isolation updates, COVID-19 test requests, and logged contacts can all be configured for archival.

This allows your response management team to access and view non-archived data much faster! When you need to view archived data for audit or compliance purposes, you can access it from your back-end databases.




## Removals

Replaced by our new and robust **Reports** tab, the **Incident Report** page has been removed. All the information in this page is now reflected in the **Reports** tab. In addition, the KPI cards at the top of the **Pass Requests** and **Surveys** pages have also been removed and the same information can be found on the **Reports** tab.

The incident locations configuration has been removed. This configuration was standalone and frequently populated with the same facility list that was already configured under the facilities configuration.

To avoid duplicate work and to provide more granularity for regionalized response efforts, the incident location has been replaced with the incident facility field. Now, any incident can be attributed to one of your facilities.

The incident location still persists for past incidents with this attribute but response managers are prompted to update the incident with a facility.

## Behavior changes

The **Facilities** tab's contents has been moved to the **Configure** tab. Click on **Facilities** in the **Configure** tab to see a list of your facilities and use the **Manage Facilities** action.

To prevent confusing users, if no areas have been created, the **Areas** field in **contact logging** is hidden from users.

The incidents grid now uses the incident ID field in lieu of a title to uniquely distinguish incidents. This means that the incident title won't show up when searching on, or exporting, incidents to Excel. To view an incident, simply click the ID.

To improve efficient load distribution and predictability, nightly processes, including the user sync and data archival, are now centralized to launch at a set system time (after hours).

## Release History

The following support information applies to Workforce Safety. To upgrade to Workforce Safety version 8.0, see the version 8.0 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 v8.0 of Workforce Safety, see the version 8.0 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 20.4 or later. Appian HIPAA Cloud is recommended to ensure potential sensitive employee health data is protected.
- A supported version of a MariaDB database as a business data source.
  - **Note**: Instructions below are tailored for MariaDB databases. For use with other databases, the SQL scripts used in Step 3 will need to be modified.
- A supported web browser.

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

## Step 1: Download software package

This package contains the following files:

- Application Zips:
  - `Workforce Safety Solution v8.0.zip`
- SQL Files
  - `Workforce-Safety-v8.0-Solution-Master-SQL-Script.sql`

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

1. Go to the **SUPPORT** tab on My Appian.
2. Click the **DOWNLOADS** tab.
3. Click **SOLUTIONS**.
4. Find and open "Workforce Safety Solution v8.0".
5. Download the software package.

## Step 2: Deploy Plug-ins

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

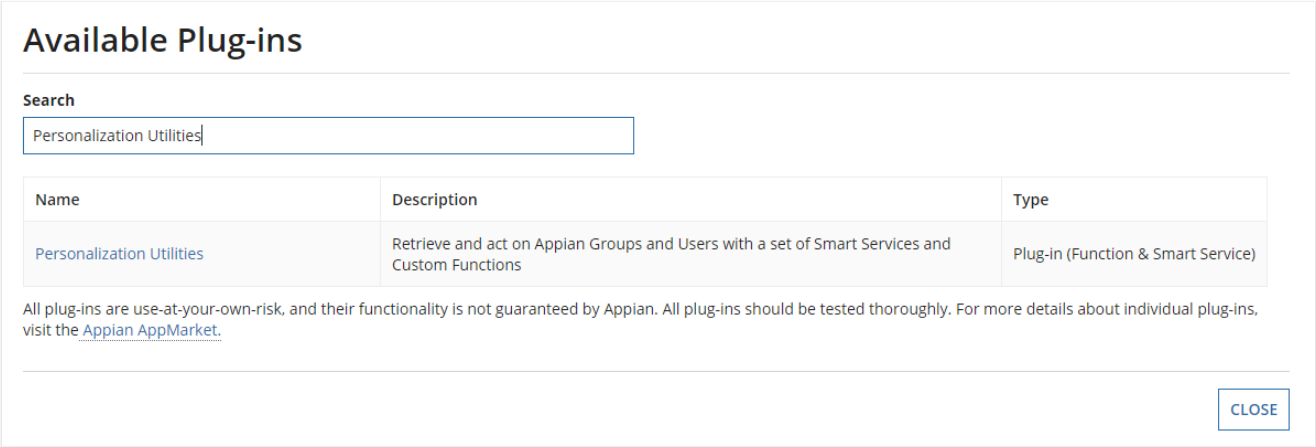
- Personalization Utilities (v3.7.0)
- Regular Expression Functions (v2.1.1)
- Load Resource Bundle (v1.2.0)
- Barcode and QR Code Utilities (v1.0.0)
- Execute Stored Procedure (v1.5.2)

### Appian Cloud Environments

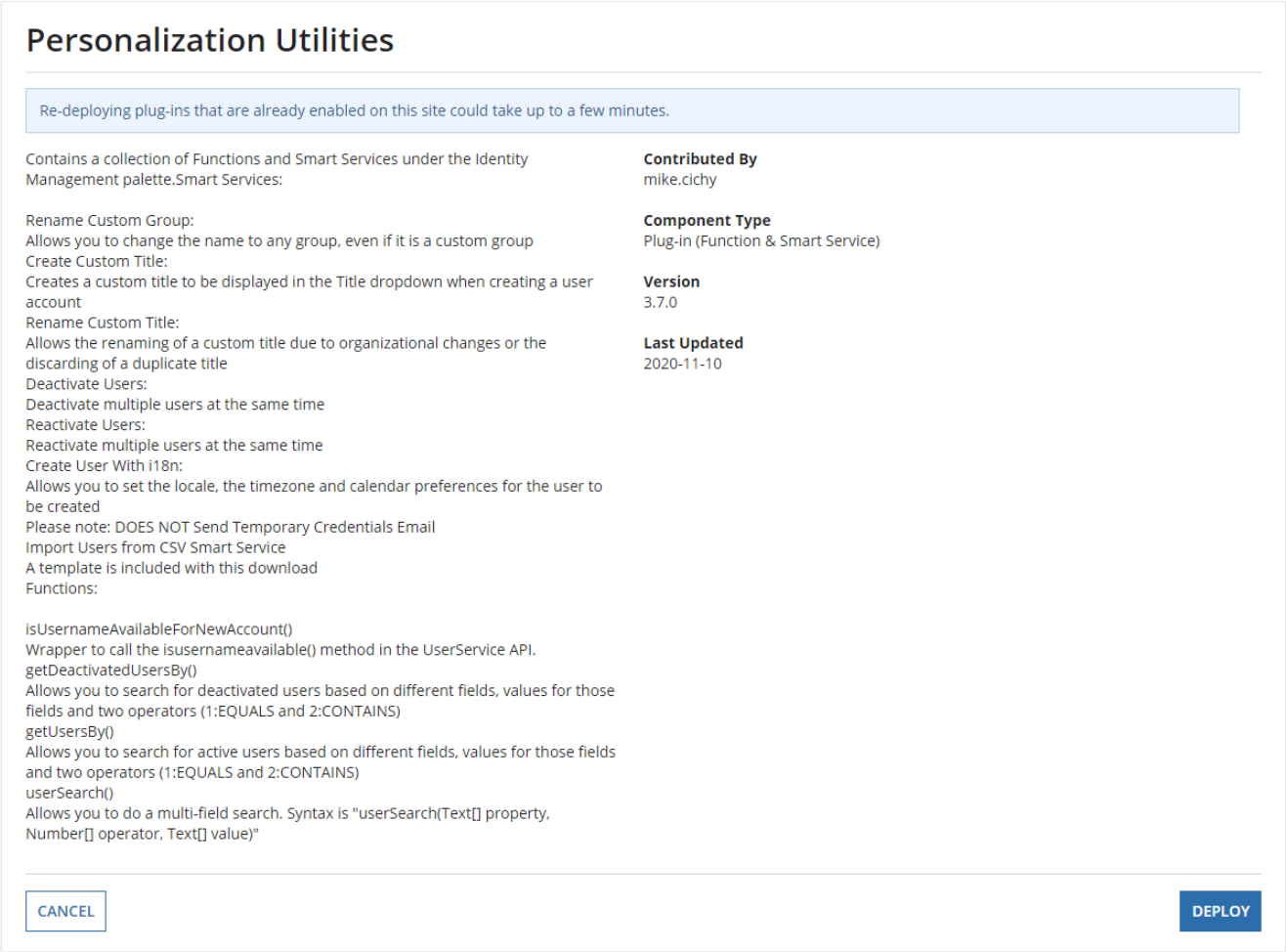
To deploy the plug-in for an Appian Cloud environment:

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 plug-ins listed above.

### Self-Managed Environments

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

## Step 3: Create database objects

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

1. In your Appian-provisioned cloud database, select the Appian (or desired target) database.
2. Import the `Workforce-Safety-v8.0-Solution-Master-SQL-Script.sql`, which was downloaded in Step 1.

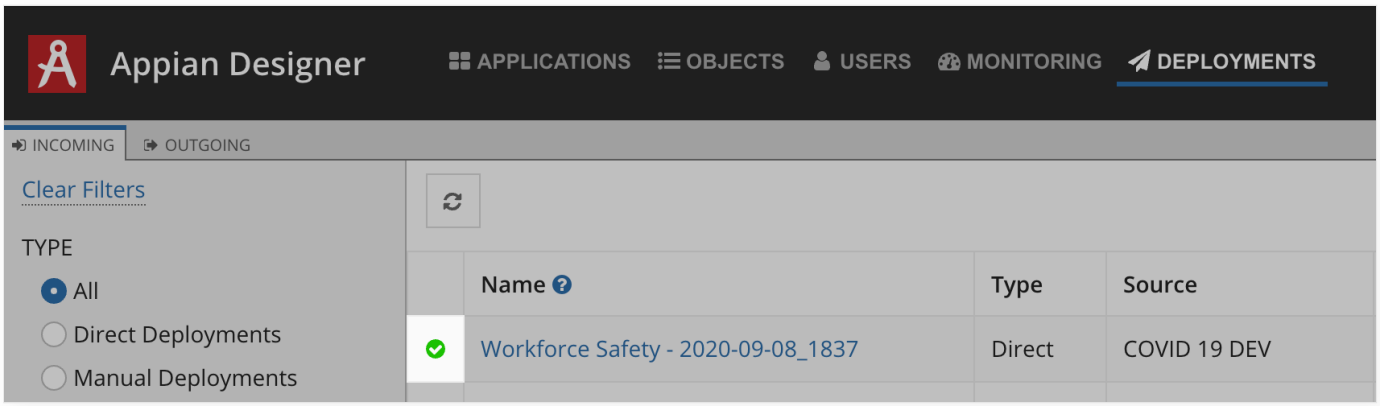
## Step 4: Import the application files

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 v8.0.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.




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

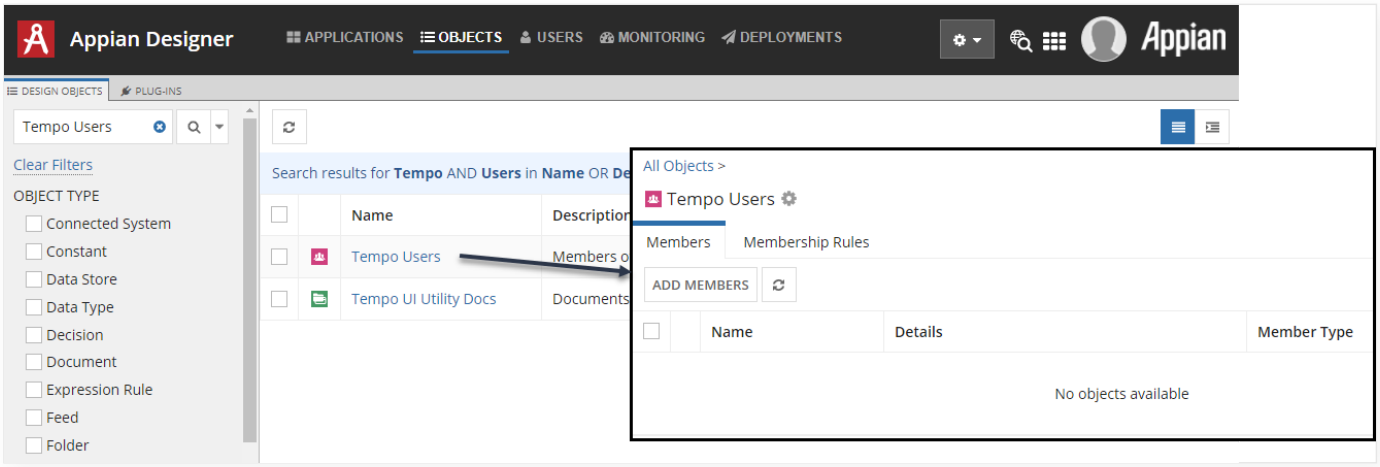
If Workforce Safety is the only application in your environment, or Tempo is not used by your organization, this step can be skipped.

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

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

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

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




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

## Next steps

After you are finishing installing the application, follow the Setup Guide to complete the solution set up.

> If your database name is not `Appian`, be sure to follow the instructions in the Setup Guide to update the database constant.

# Setup Guide

## Introduction

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

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

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

Reach us by phone:

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

Reach us by email: support@appian.com

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

## Step 1: Set up admin users

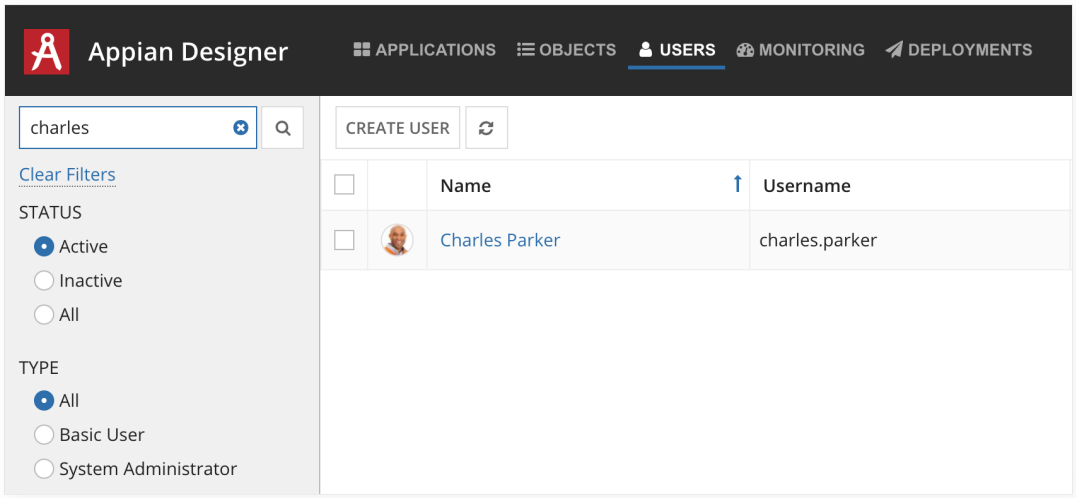
Users that you want to act as administrators should be added to the administrators group. This group receives emails when there are errors in the solution processes so that they can monitor and respond to these errors.

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

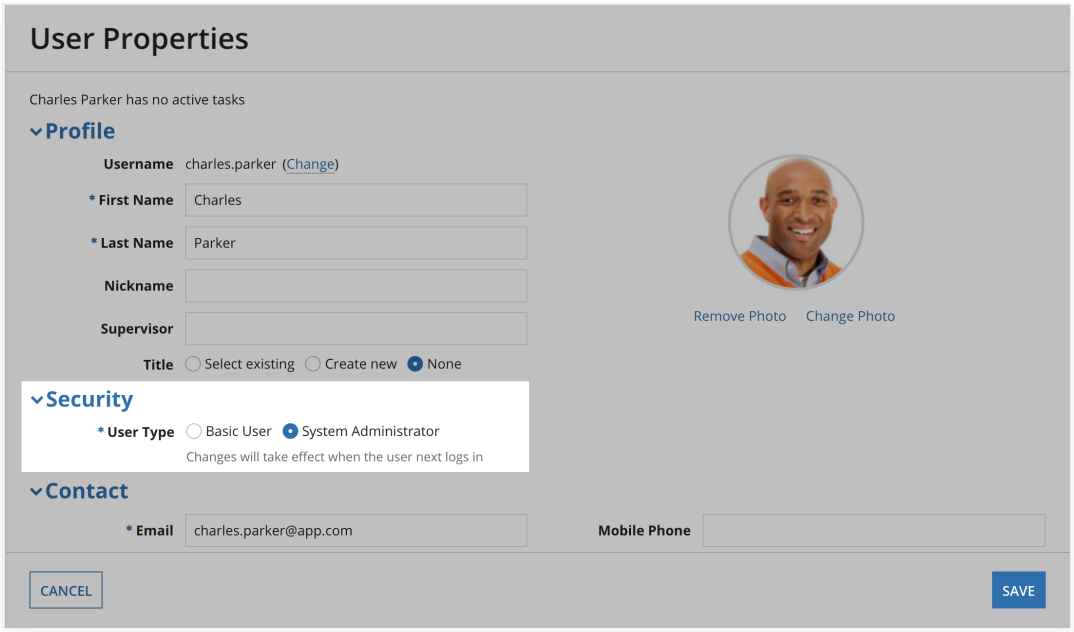
> To restrict access to sensitive information, members of the administrators group do not have access to the content on the **Response Hub**, even though they can see it. See the Groups Reference Page for more information about the access that members of each group have.

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

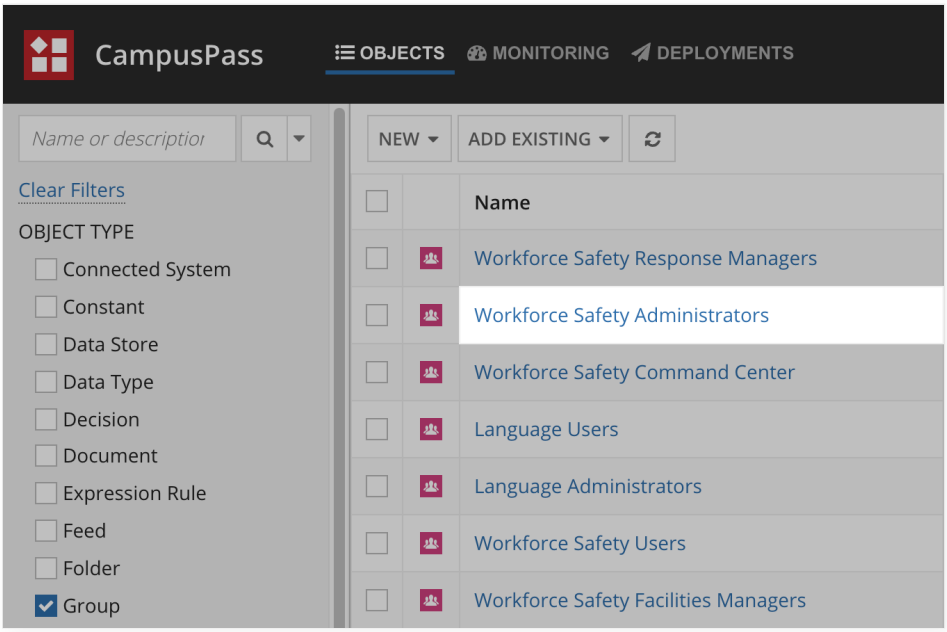
1. In your Appian environment, log in as a system administrator.
2. In the top-right corner of the page, go to the navigation menu and select **Appian Designer**.
3. Make sure that the **User Type** for the admin user is **System Administrator**.
   - Go to the **Users** tab.
   - Find and open the user.



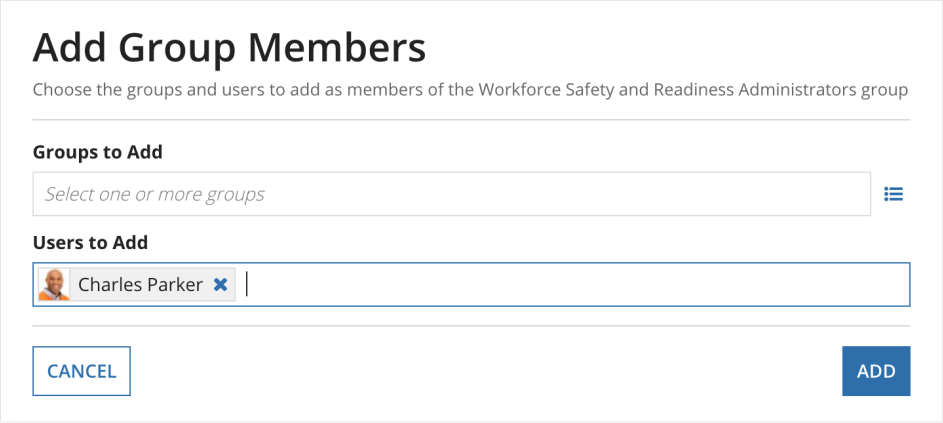

   - Verify that the **User Type** is **System Administrator**. If not, select **System Administrator** and click **Save**.




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

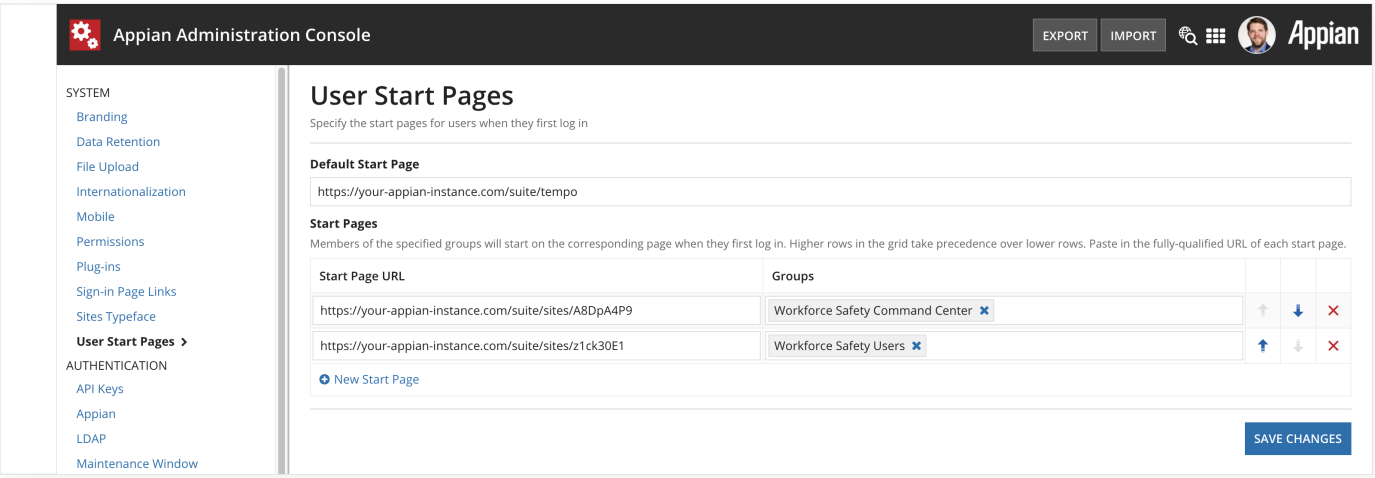
A user start page is the default page that displays for users when they first log in to Appian. If your users will use Workforce Safety as their primary Appian site, we highly recommend setting the user start page for all of your users to either the **COVID-19 Workforce Safety** site or the **Response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

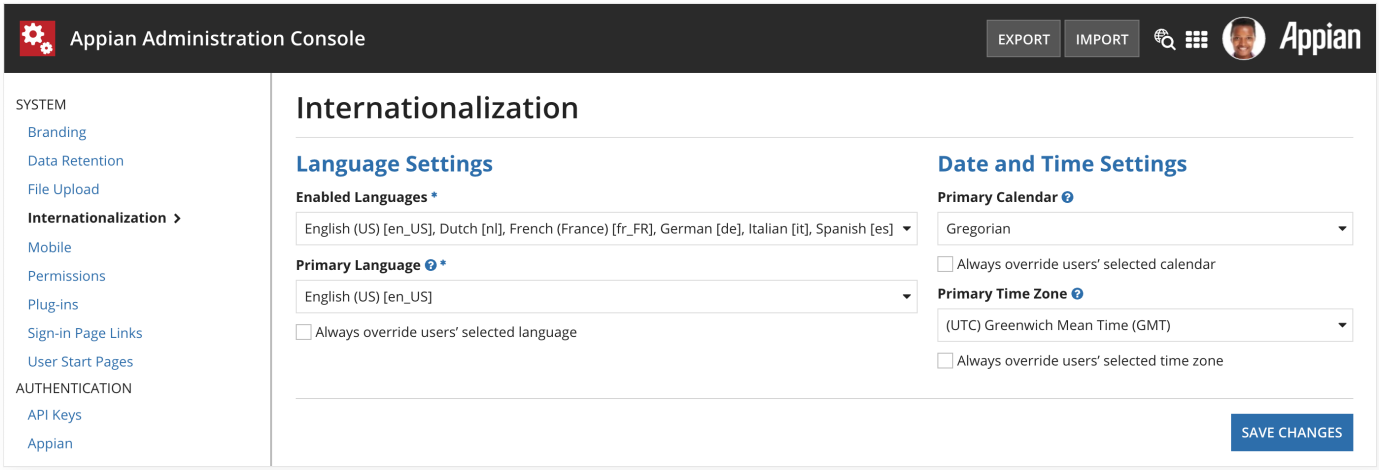
## Setting the default language

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

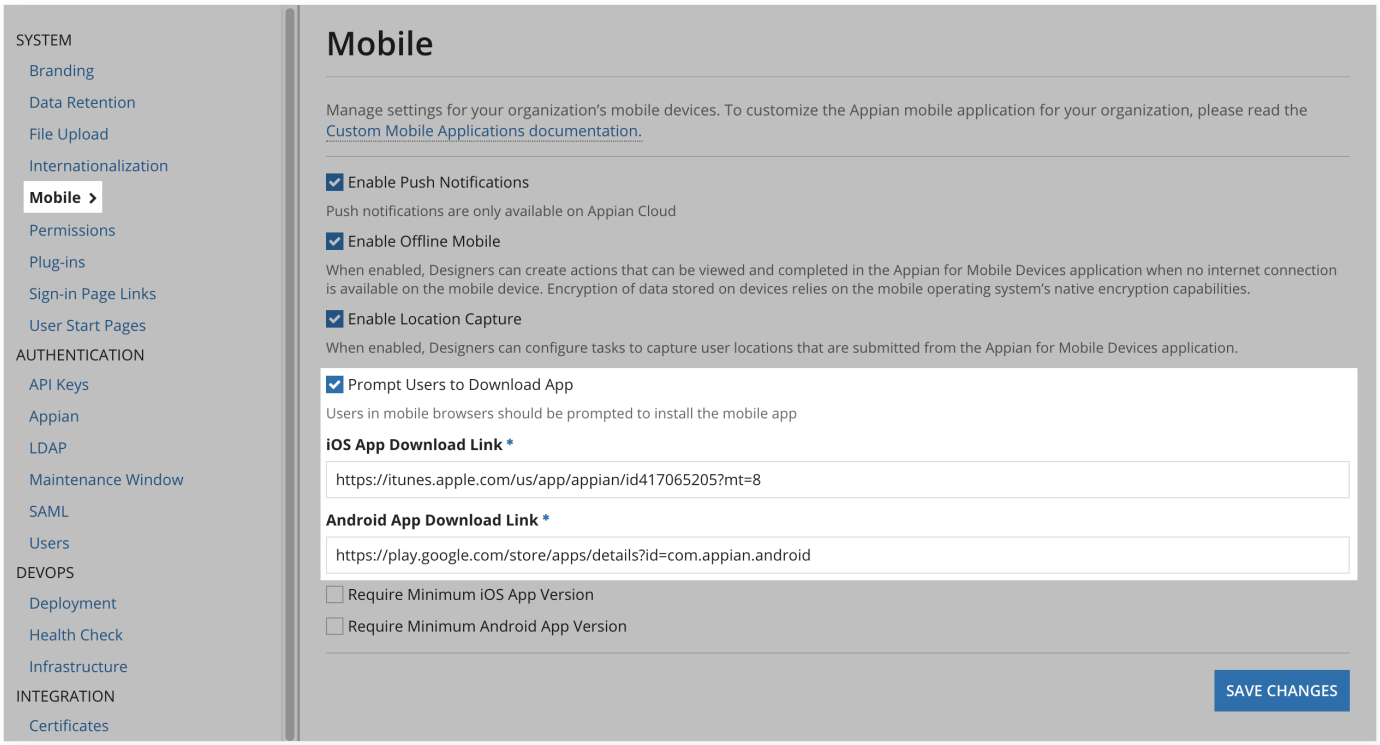
On mobile devices, Workforce Safety works best in the Appian mobile app, instead of a mobile browser. Some organizations may even decide to create their own custom version of the Appian application with their own branding.

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**.



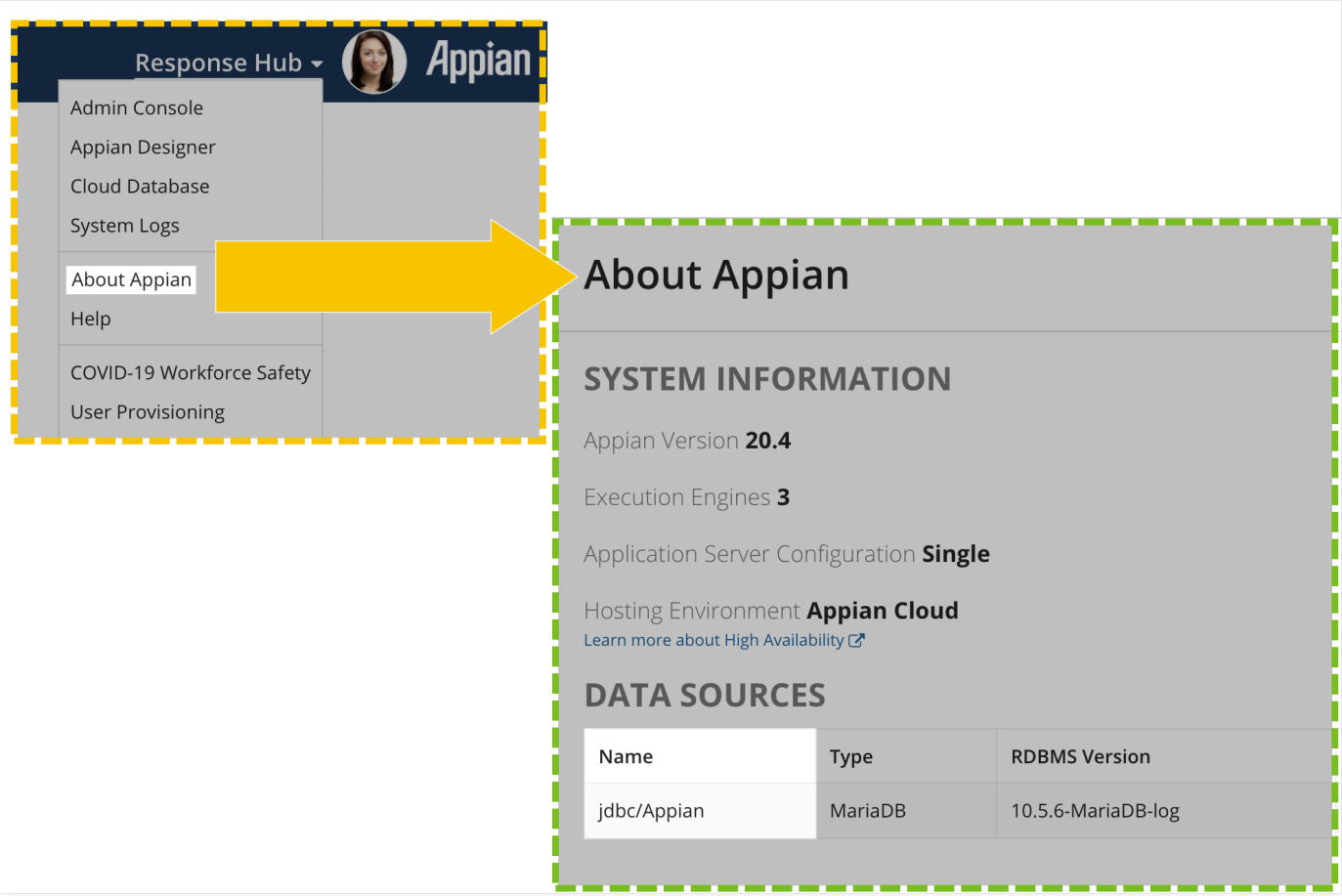

## Step 3: If the database name is not Appian, update the database constant

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

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

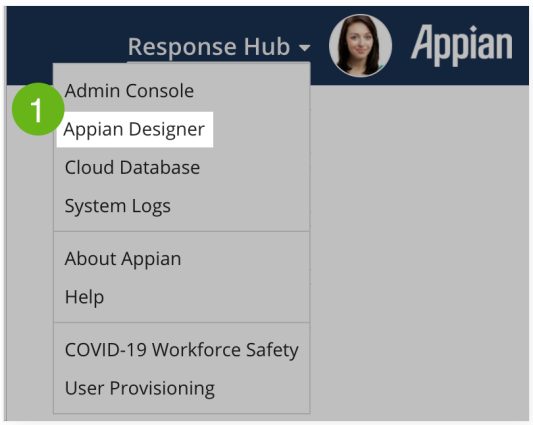
To determine the name of your database:

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

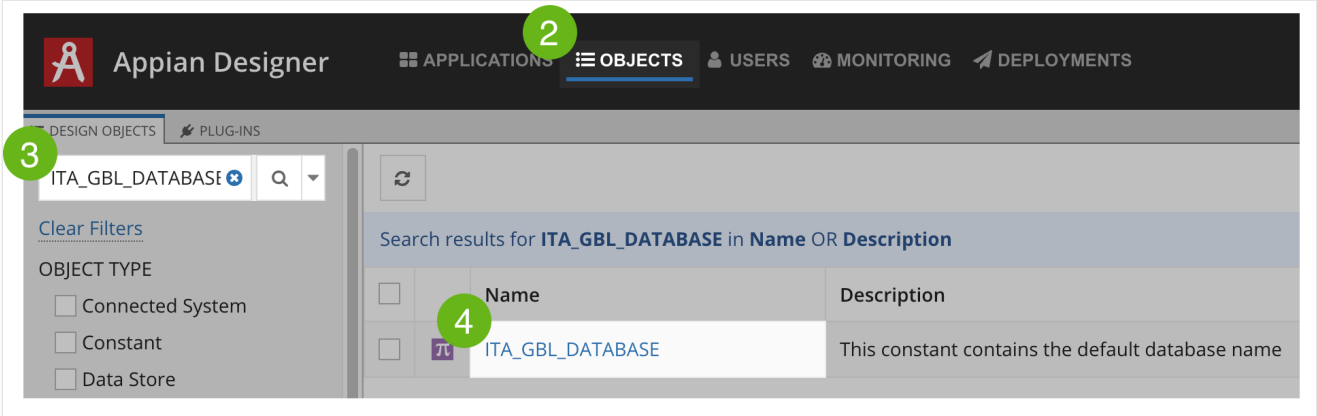



To update the name of the database in the constant:

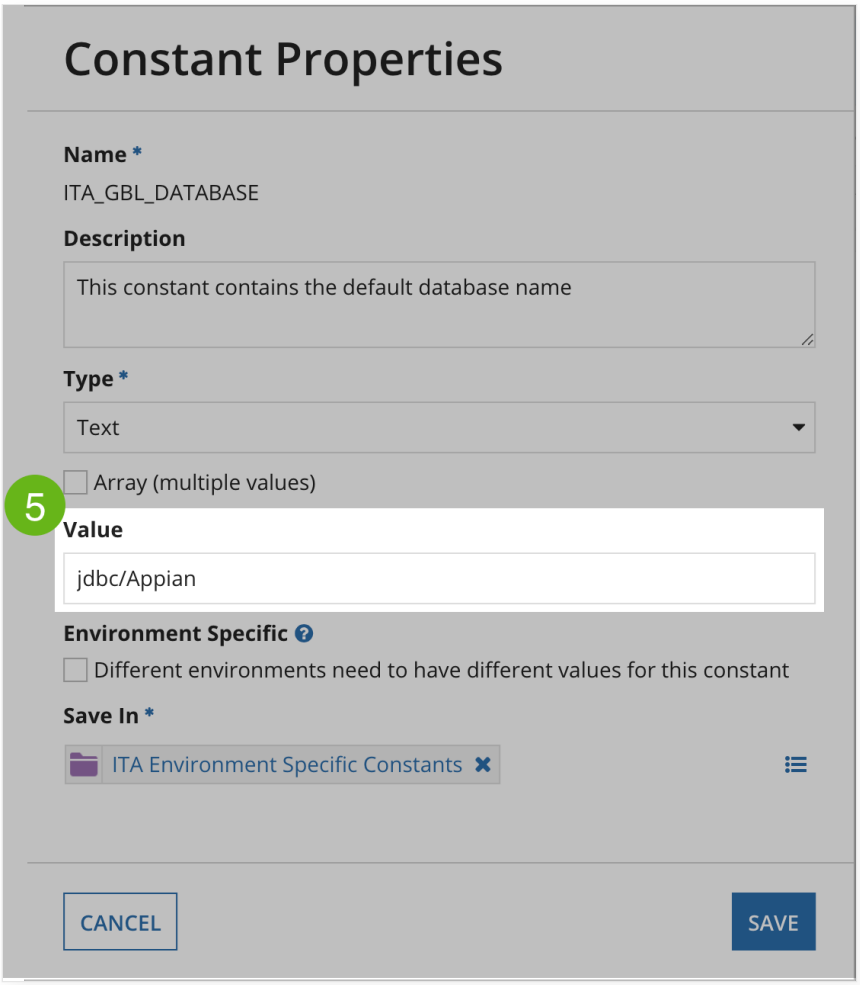
1. Go to the navigation menu and select **Appian Designer**.




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




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

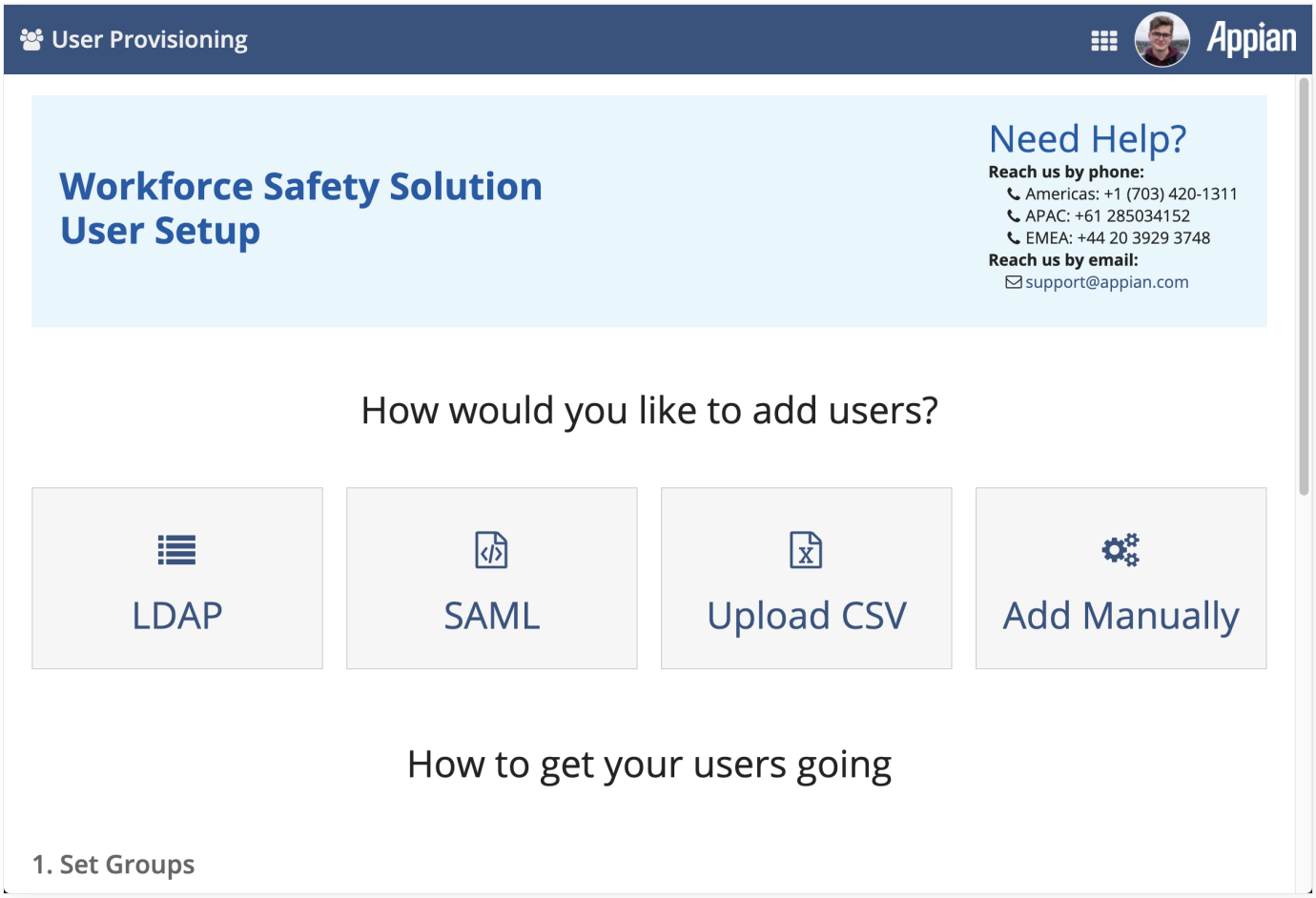



## Step 4: Add users and assign to groups

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

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

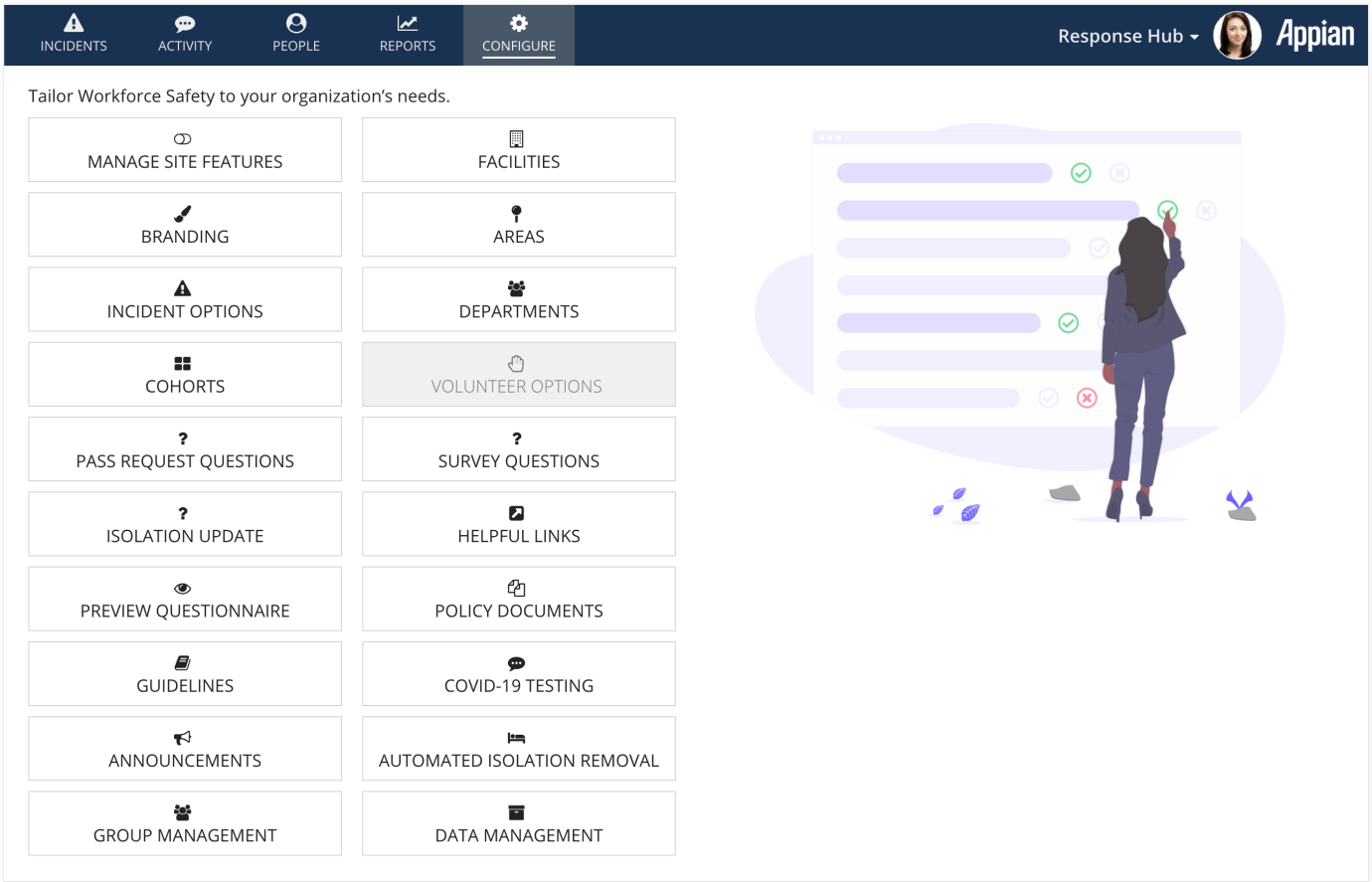
After you are done adding users, follow the instructions on the site to add users to groups to grant them access to the parts of the solution they will need.




## Step 5: Configure the site for your organization

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

Follow the instructions on the Configure the Site page to configure Workforce Safety.




## Step 6: Launch solution

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

# Mobile Device Setup

## Introduction

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

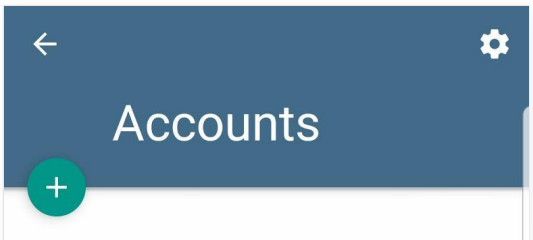
This page provides instructions for how to download and set up the mobile Appian application to use Workforce Safety.

## Accessing Workforce Safety on a mobile device

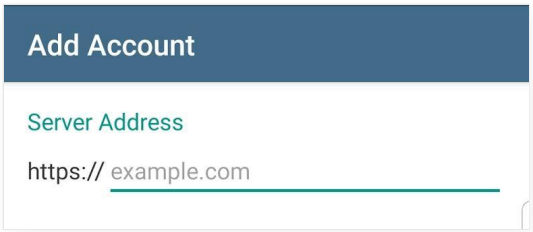
In order to use Workforce Safety on your mobile device, download the Appian application on your phone.

To download and set up the Appian mobile application:

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




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




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

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

# Best Practices for Optimal User Experience

## Introduction

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

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

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

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

## Optimal usage for Workforce Safety

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

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

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

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

### What causes peak periods?

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

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.

## Data archival strategy

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

For instructions on how administrators can configure what data is archived and when, see the Configuration Guide.

### Recommendations

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

- ***Pass Requests***: It is recommended that this volume does not exceed 500,000 data entries. Since pass requests are generated daily by users, it is recommended to set archival here based on how many pass requests are being generated per week. For example, if users are completing ~125,000 pass requests per week, we suggest archiving at 30 days.
- ***Surveys***: It is recommended that this volume does not exceed 100,000 data entries. Since surveys are generally only created one time per user, it is recommended that you archive surveys if you approach the recommended limit, as well if the data is no longer needed for business purposes.
- ***Isolation Updates***: It is recommended that this volume does not exceed 100,000 data entries.
- ***Incidents***: It is recommended that this volume does not exceed 100,000 data entries.
- ***Tests***: It is recommended that this volume does not exceed 100,000 data entries.
- ***Log Contacts***: It is recommended that this volume does not exceed 1,000,000 data entries.

When evaluating data volume for archival, consider the following:

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

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

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

# 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

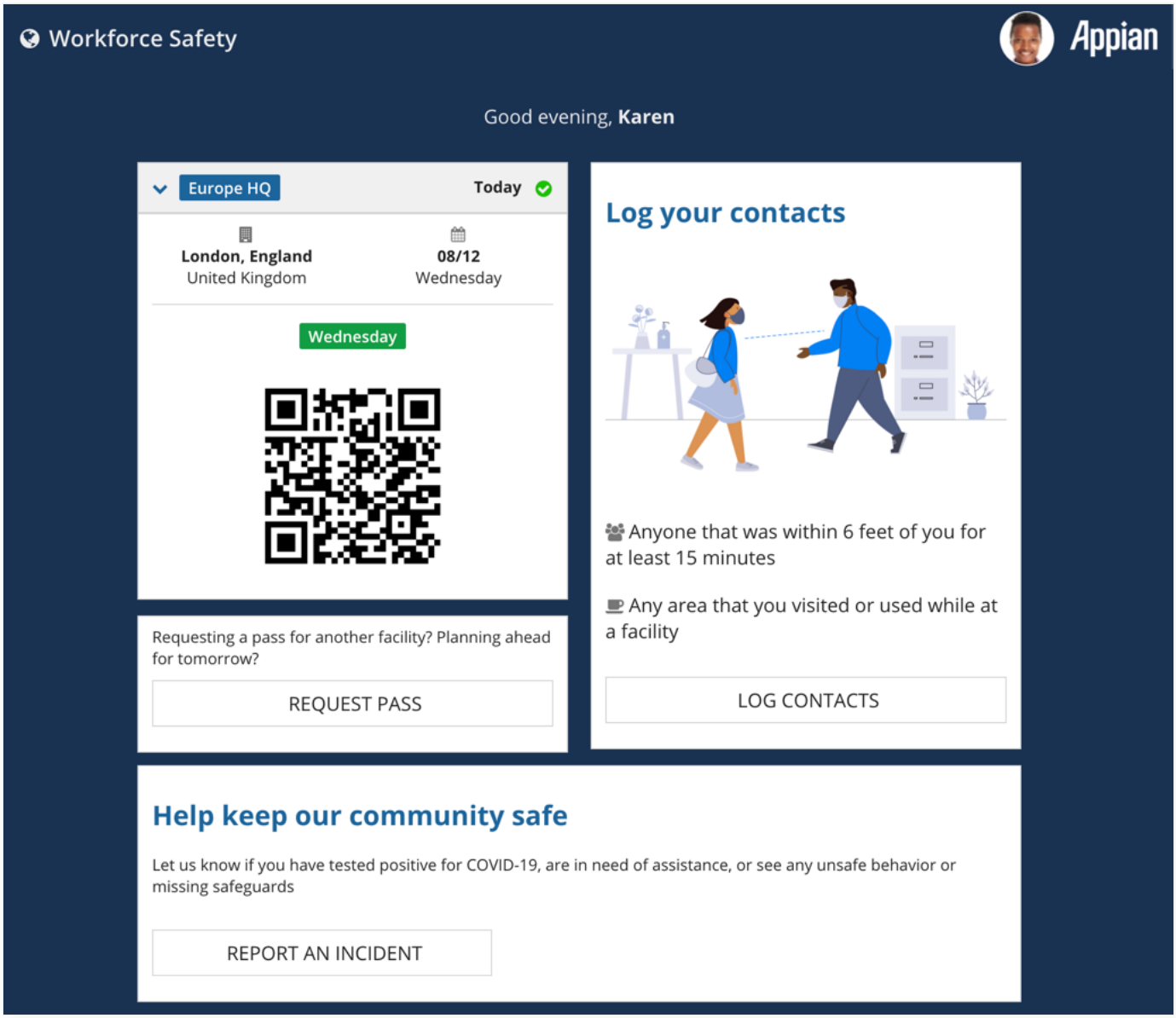
- For instructions on how to access Workforce Safety on a mobile device, see Mobile Device Setup.
- For instructions on how to use the response hub, see the Response Hub User Guide.

## Workforce Safety home page

Workforce Safety contains a home page where users can:

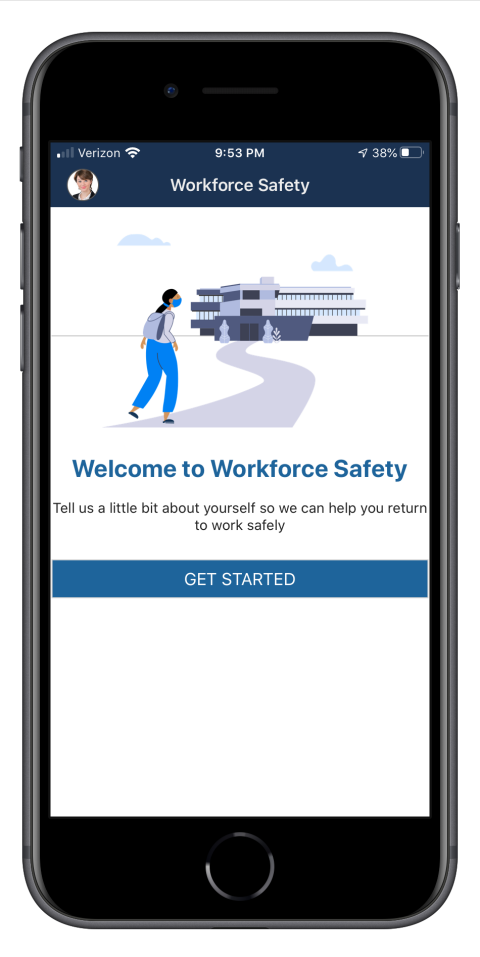
- Update user profile.
- Complete surveys (if enabled).
- Request passes.
- Log contacts.
- Report incidents (if enabled).
- Complete isolation updates
- Submit COVID-19 test results.
- Use community help features (if enabled).
- View valuable resources such as safety guidelines, helpful links, policy 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.



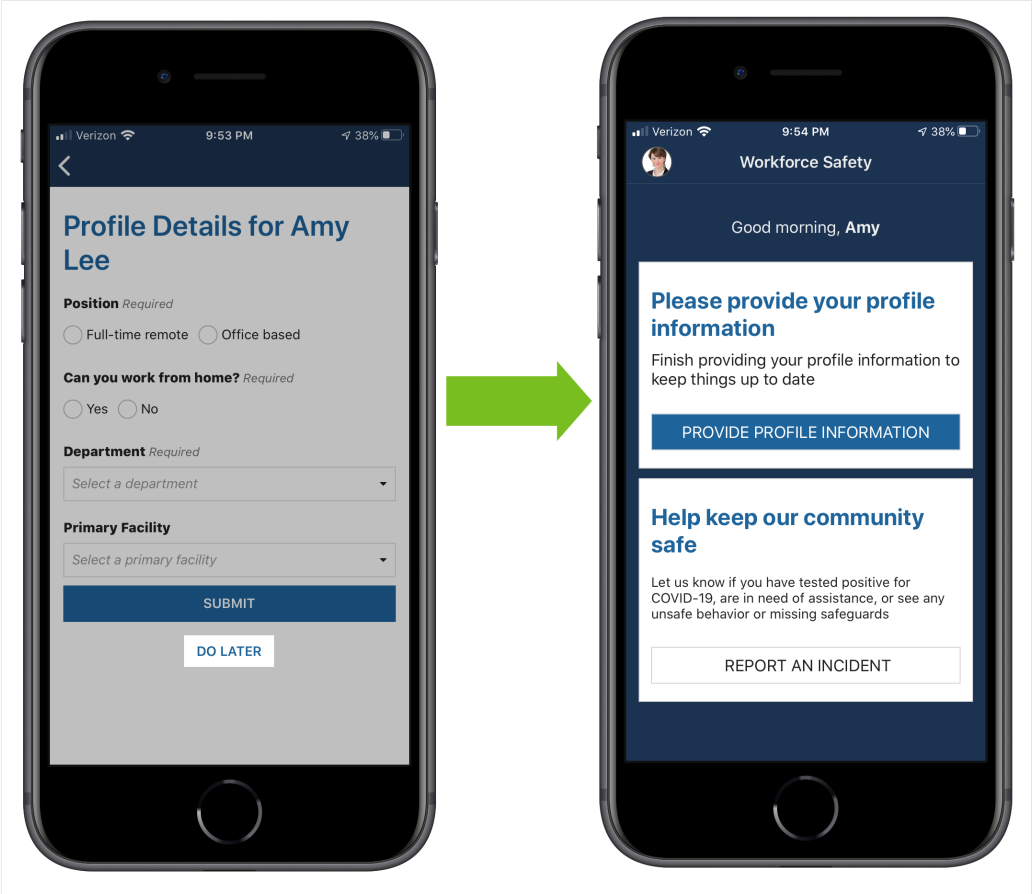

Users can click **DO LATER** to skip this step and go straight to the Workforce Safety home page.

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.

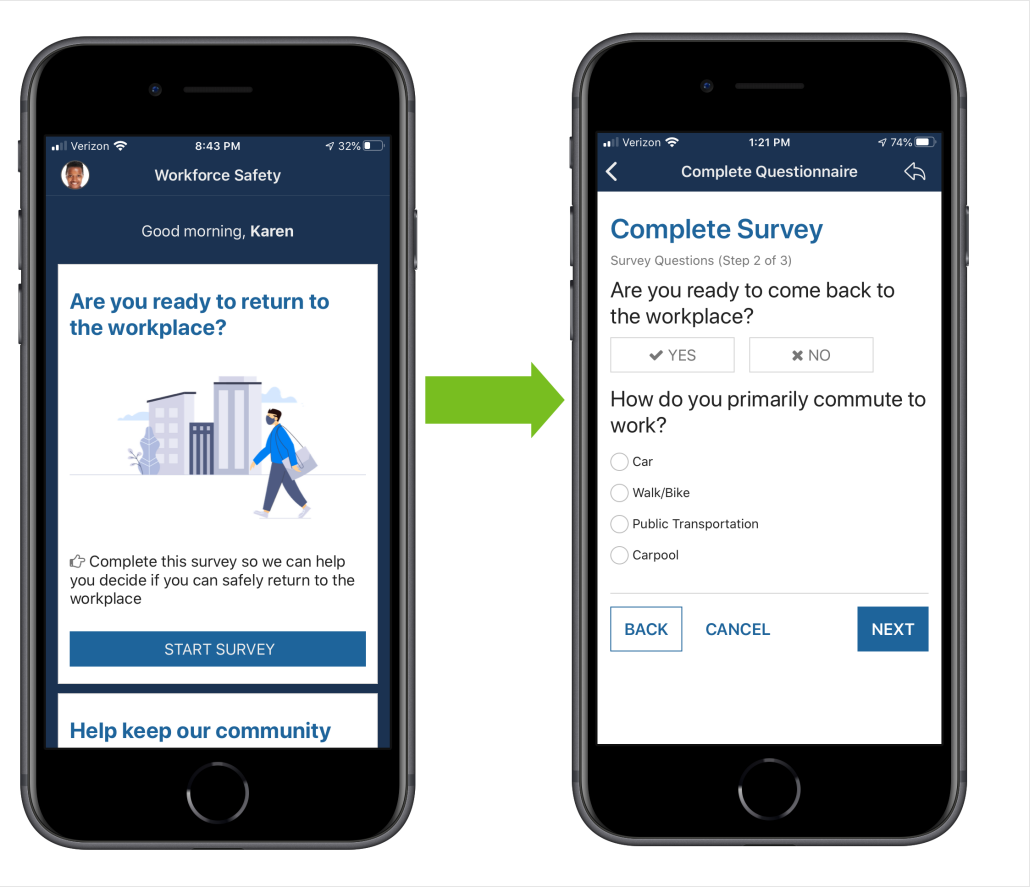



Users can update their profile information at any time by clicking the **Profile** icon at the bottom of the home page.

## 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.

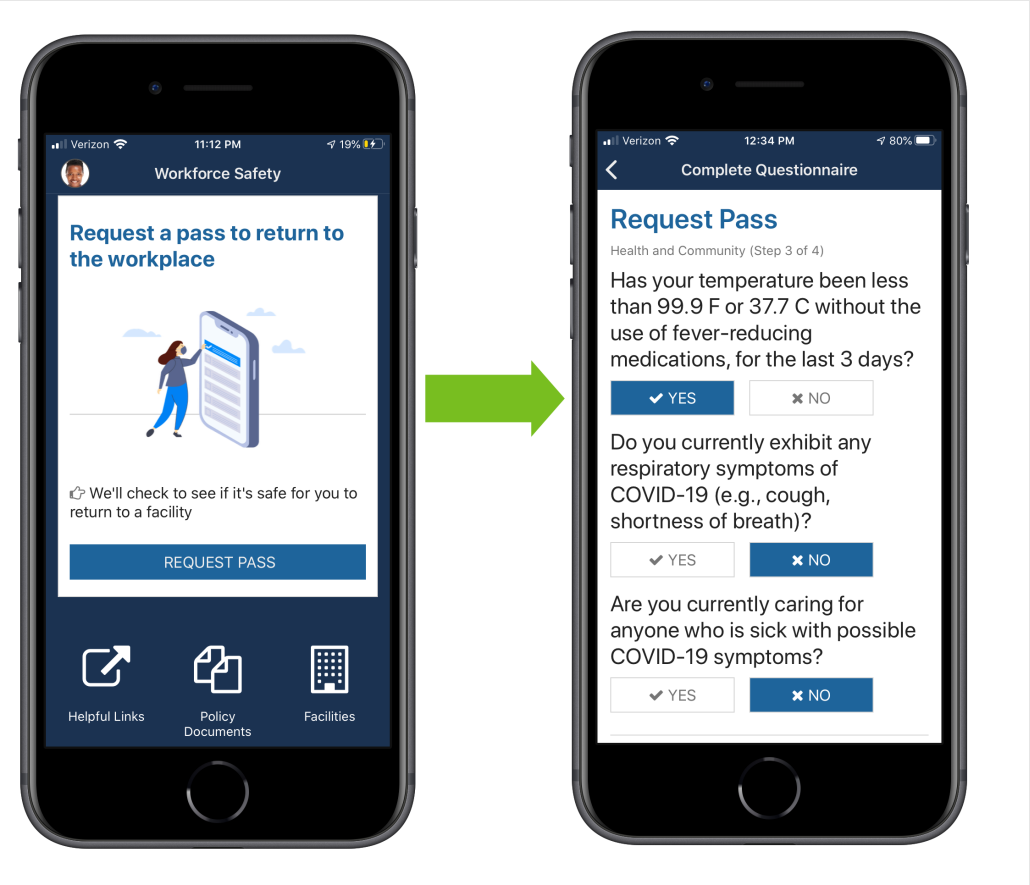



If the **Pass Requests Disabled by Active Survey Incidents** feature toggle is turned on and an incident is created based on a user's response to a survey question, they will not be able to request a pass until a response manager closes the incident. If they update their survey, a comment will be added 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.

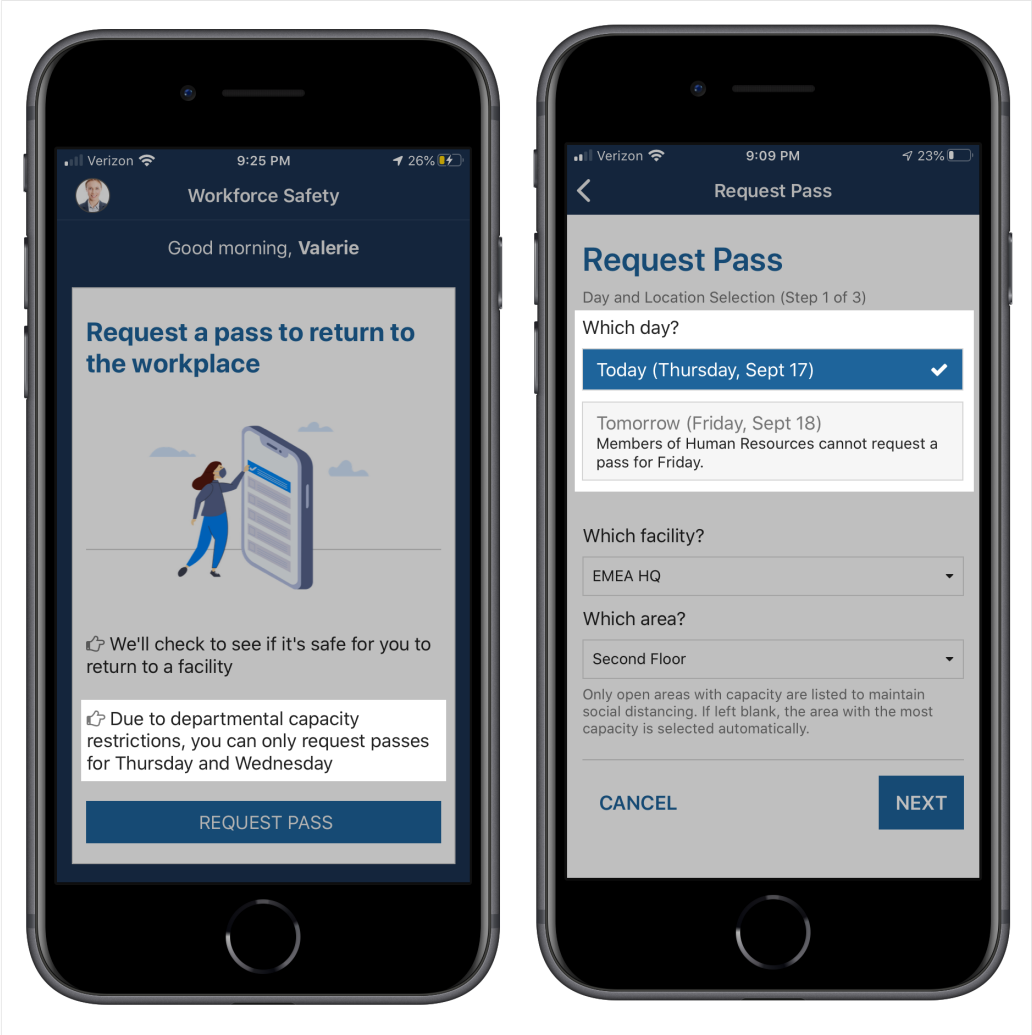
Requesting a pass helps users determine their fitness to return to the workplace. All questions are required and the information will go to the response managers reporting dashboard.




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.

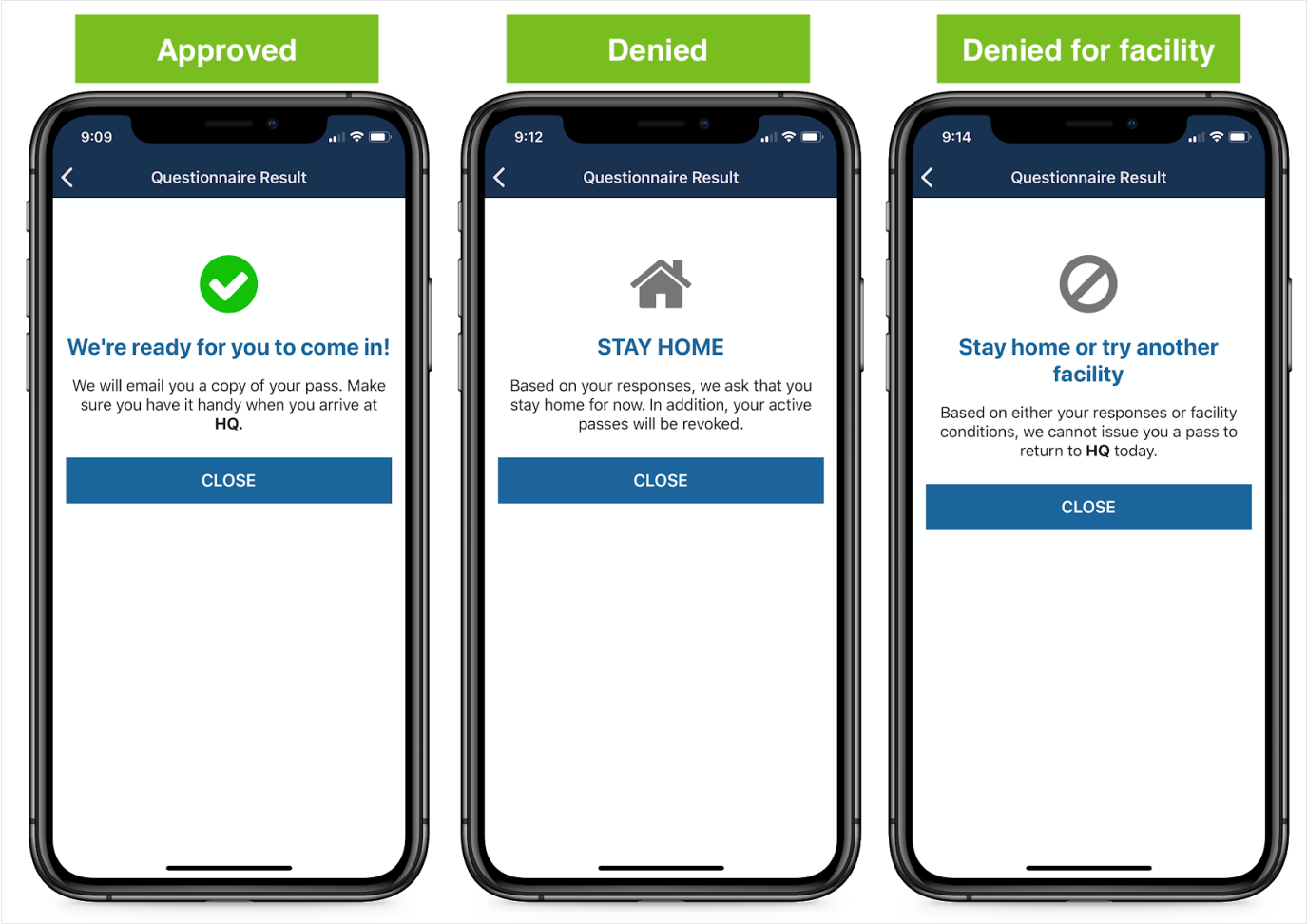
If Cohort Management is toggled on, users will see which days their department can request a pass for. They can also only request a pass for days that are assigned to their cohort.




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

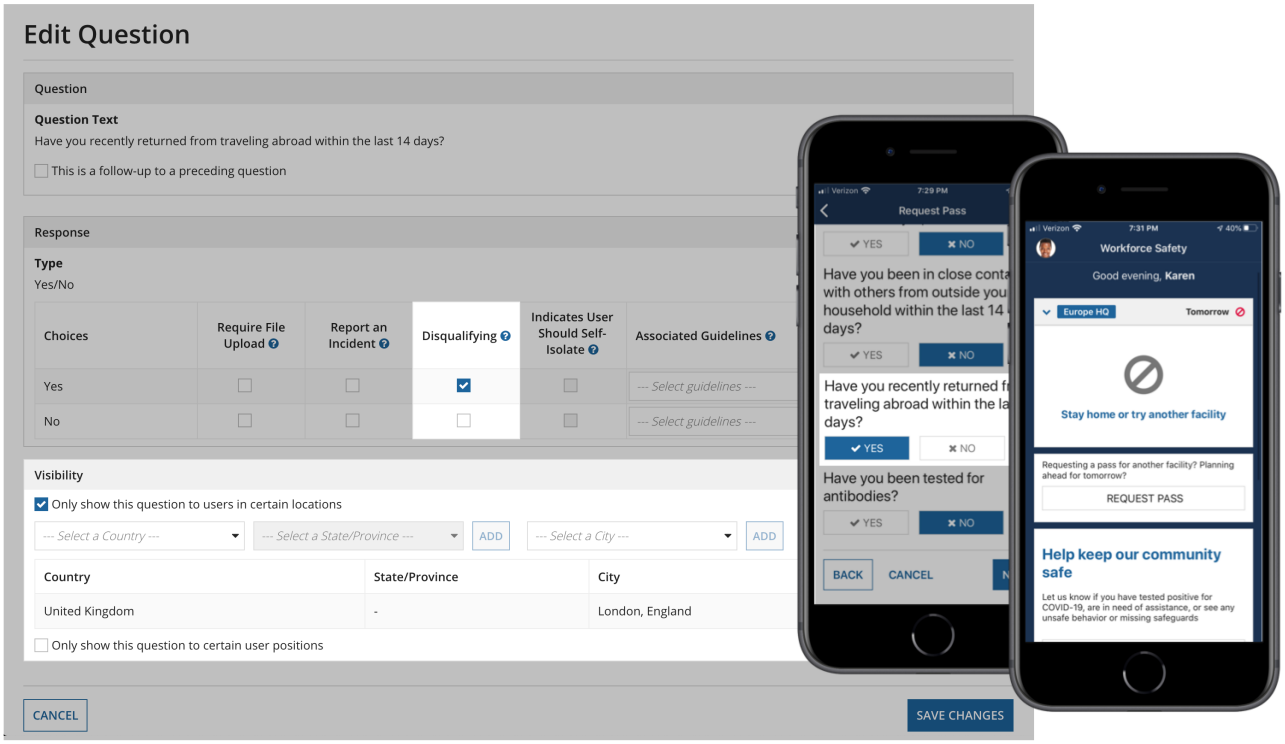
## Pass eligibility

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

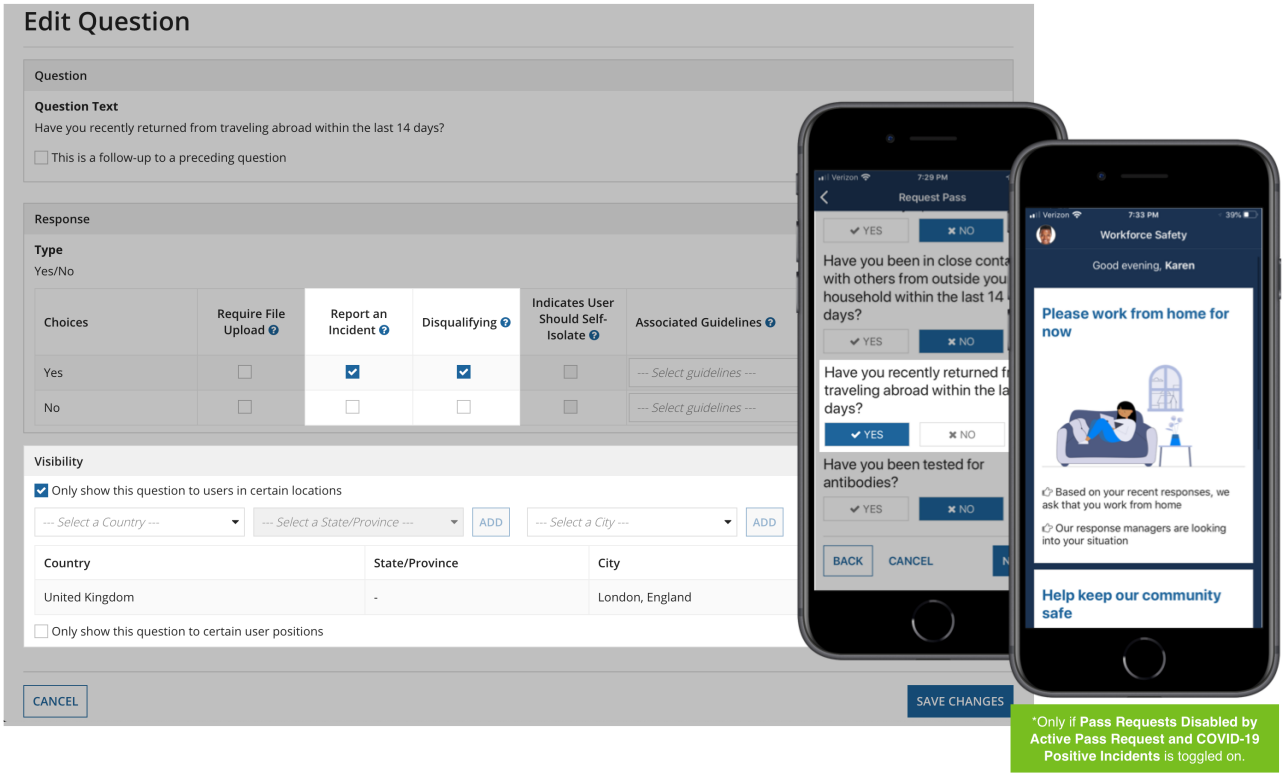



### Denied for facility explanation

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 Isolation 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:

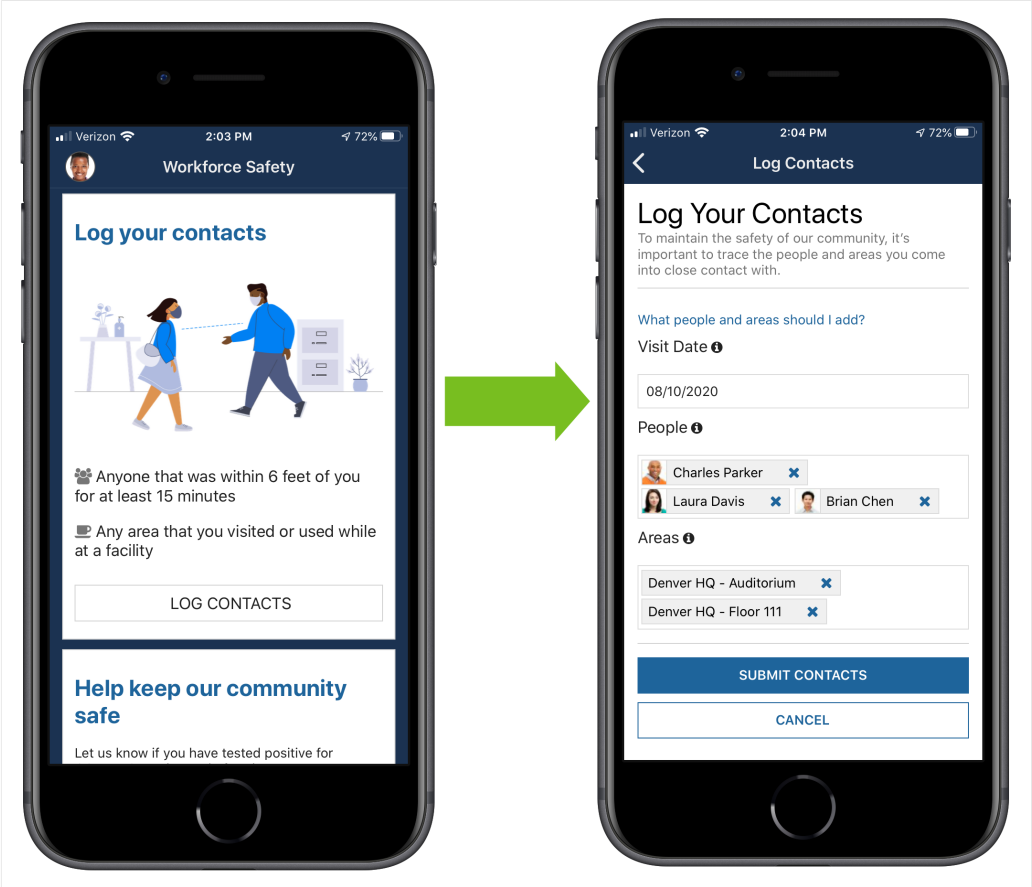
- The facility that the pass is for.
- The area that the pass is for (if Enforce Area Capacity Restrictions is toggled on).
- The color-coded day of the week that the pass is for.
- A QR code that can be scanned at the facility.

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.

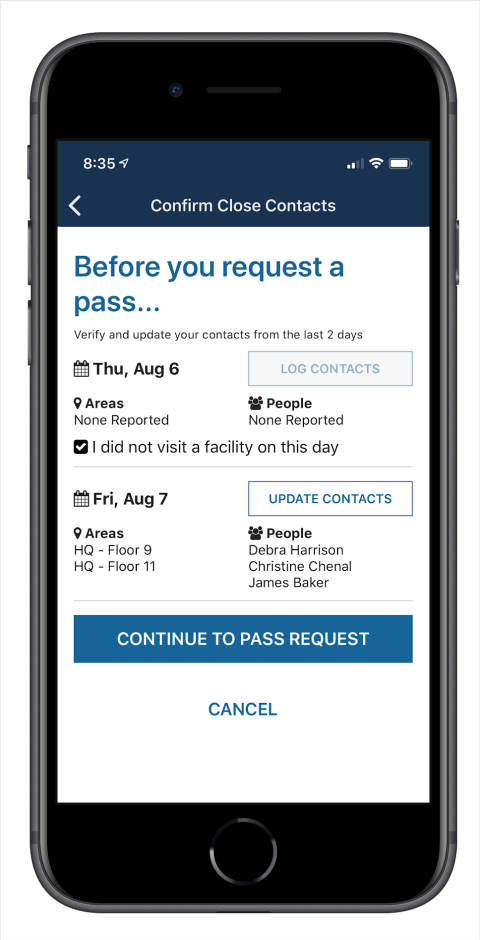
## Logging contacts

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 isolation incident, the information they input here will display to response managers on the related incident.

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

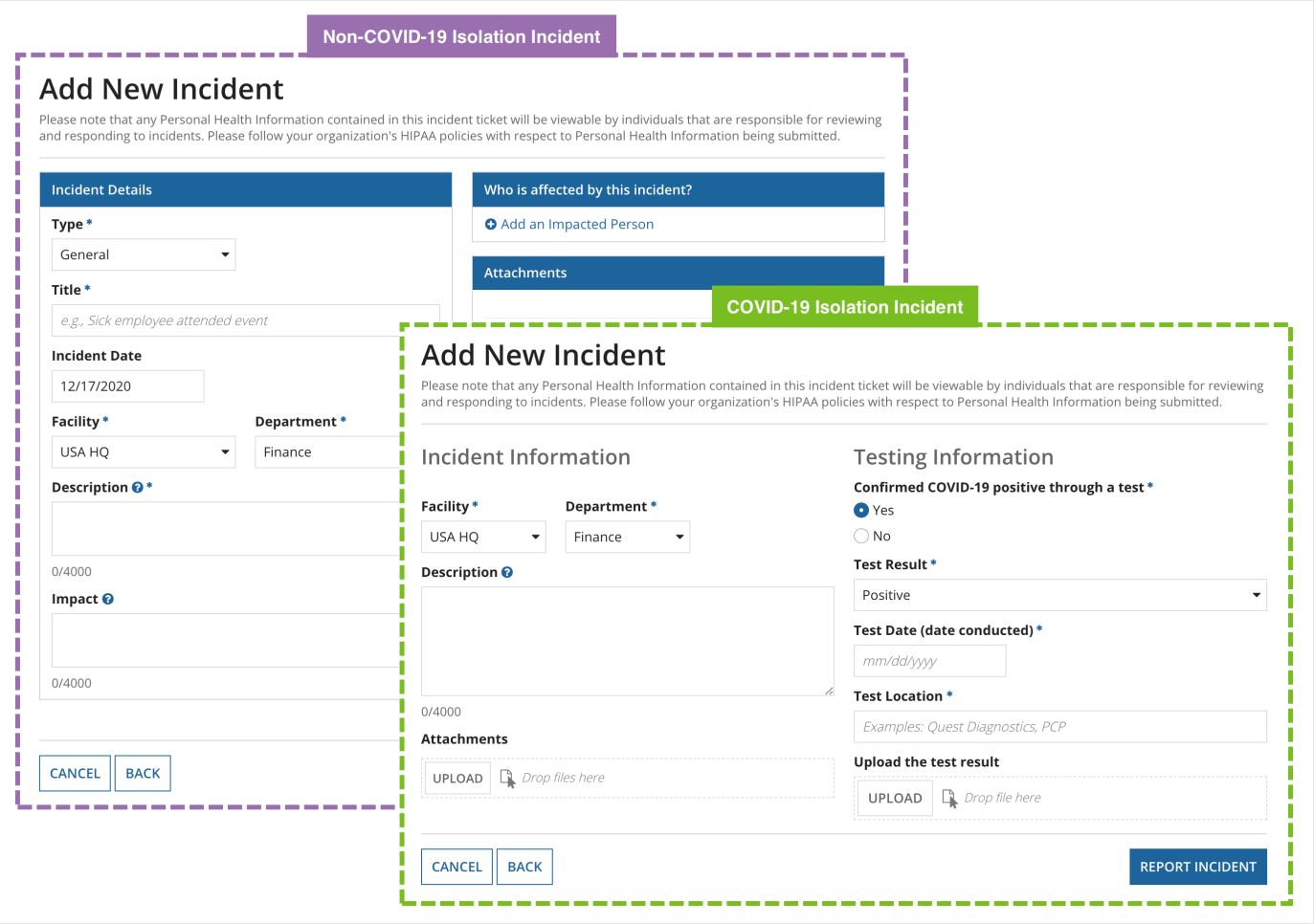



## Reporting an incident

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

To report an incident:

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




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

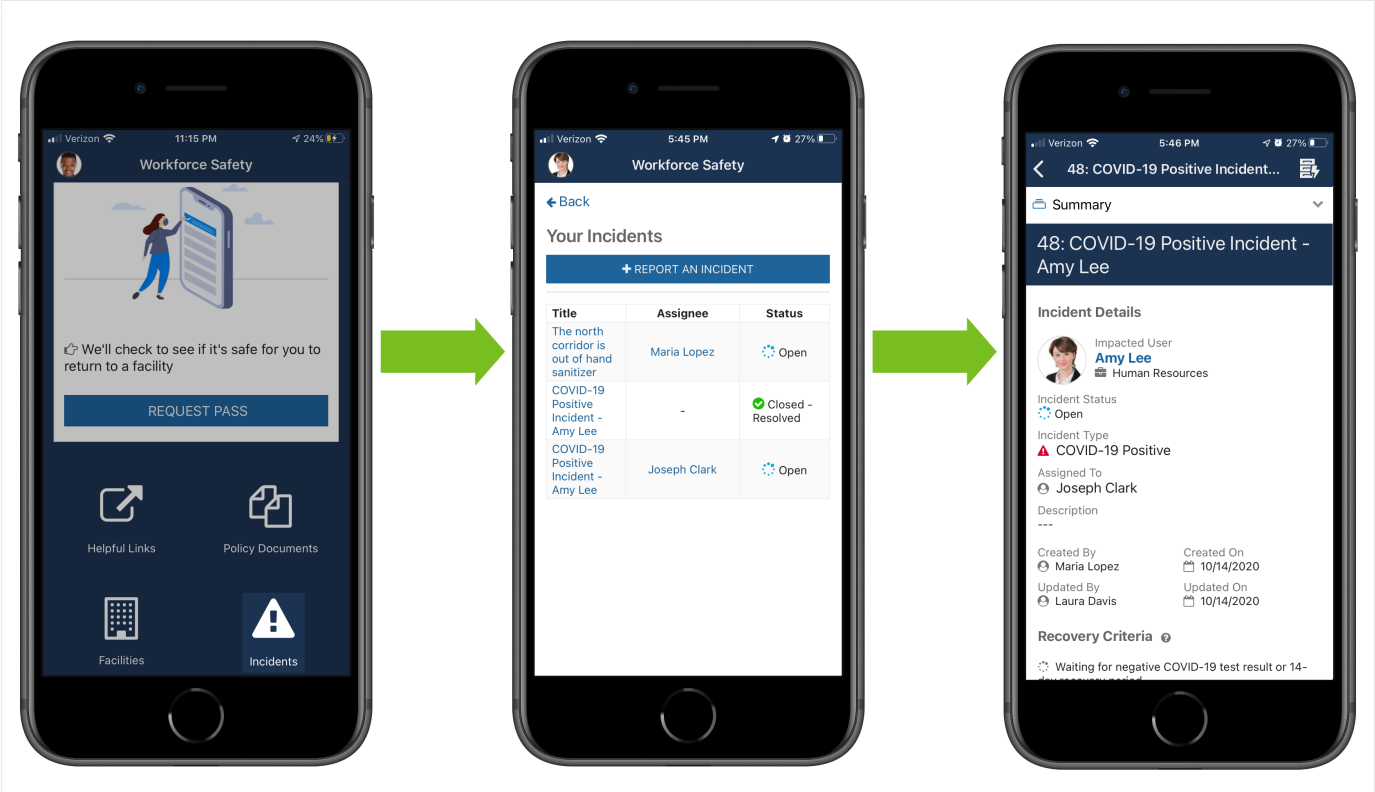
## Viewing incidents

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

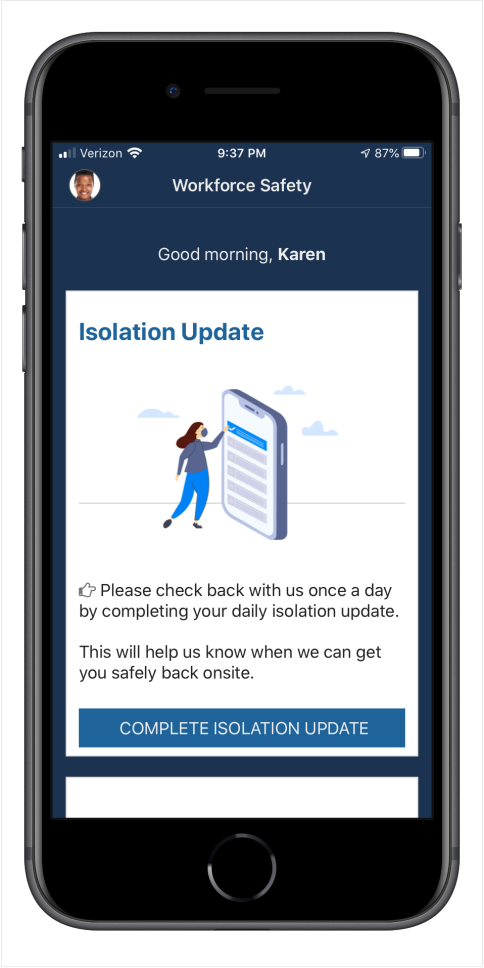
Only the following incidents display:

- COVID-19 isolation incidents for the user.
- Incidents created by the user.
- Incidents created by a response manager on behalf of the user.

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




## 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, are showing symptoms, or came in contact with someone who tested positive for COVID-19. While users are isolated, they cannot complete a survey or request a pass, but they can perform all other actions on the site. As soon as a user is placed into isolation any active passes they have will be revoked.

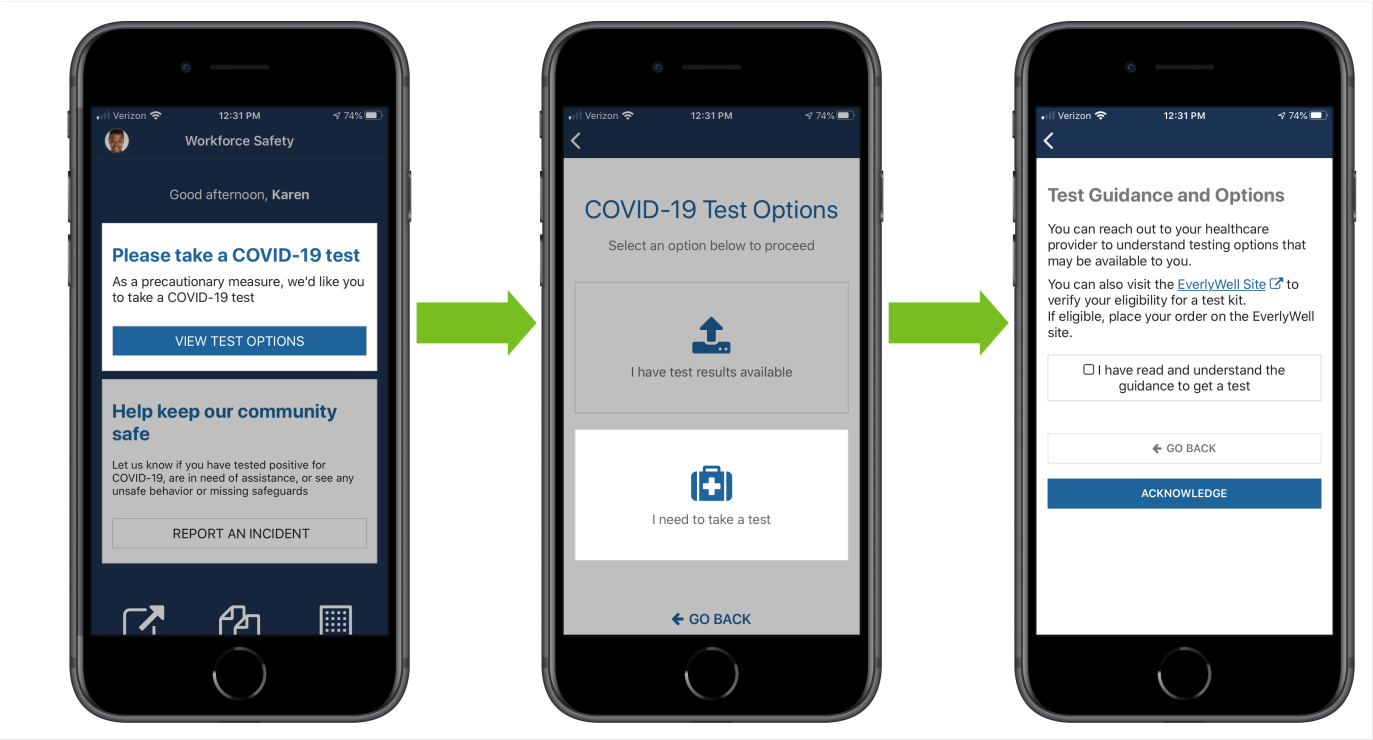
When users are in isolation, instead of a pass request section, they will see a **COMPLETE ISOLATION UPDATE** section on their home page.

# 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.

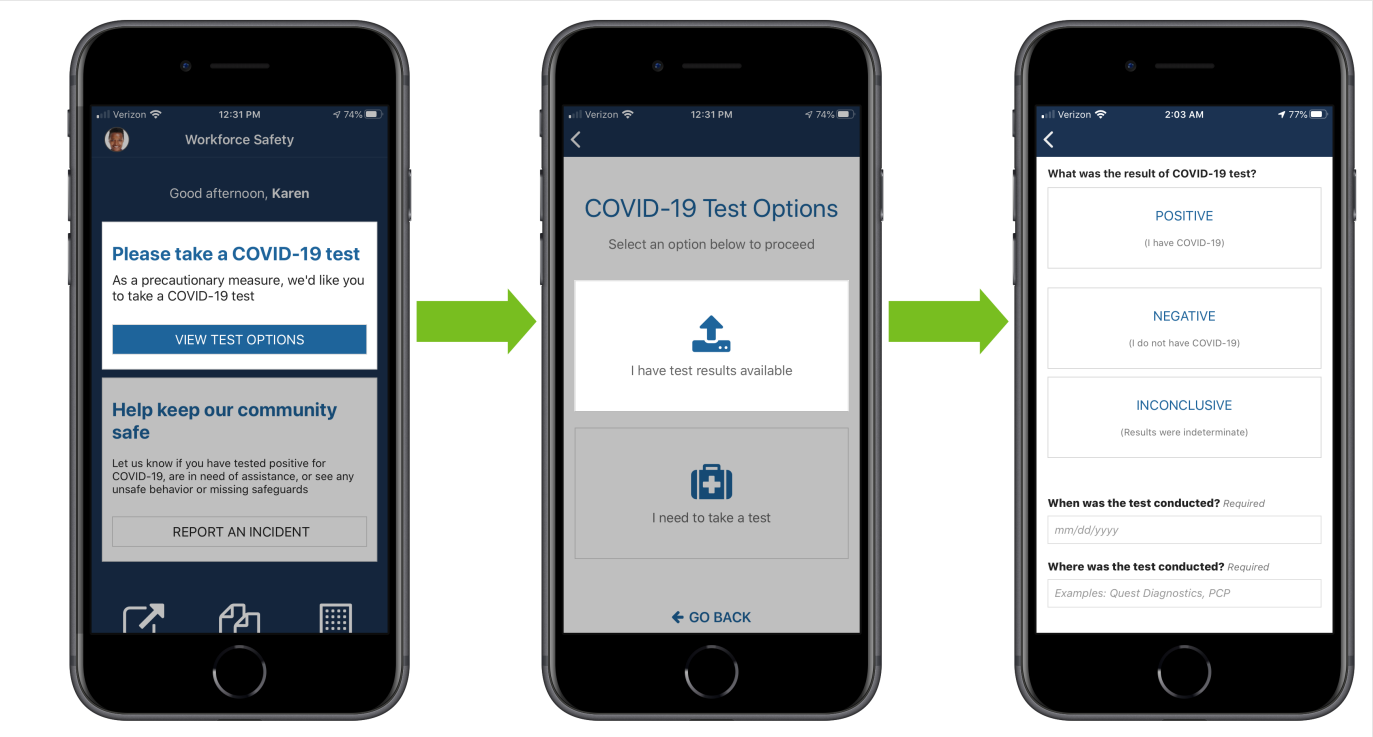
To acknowledge the test request:

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**.

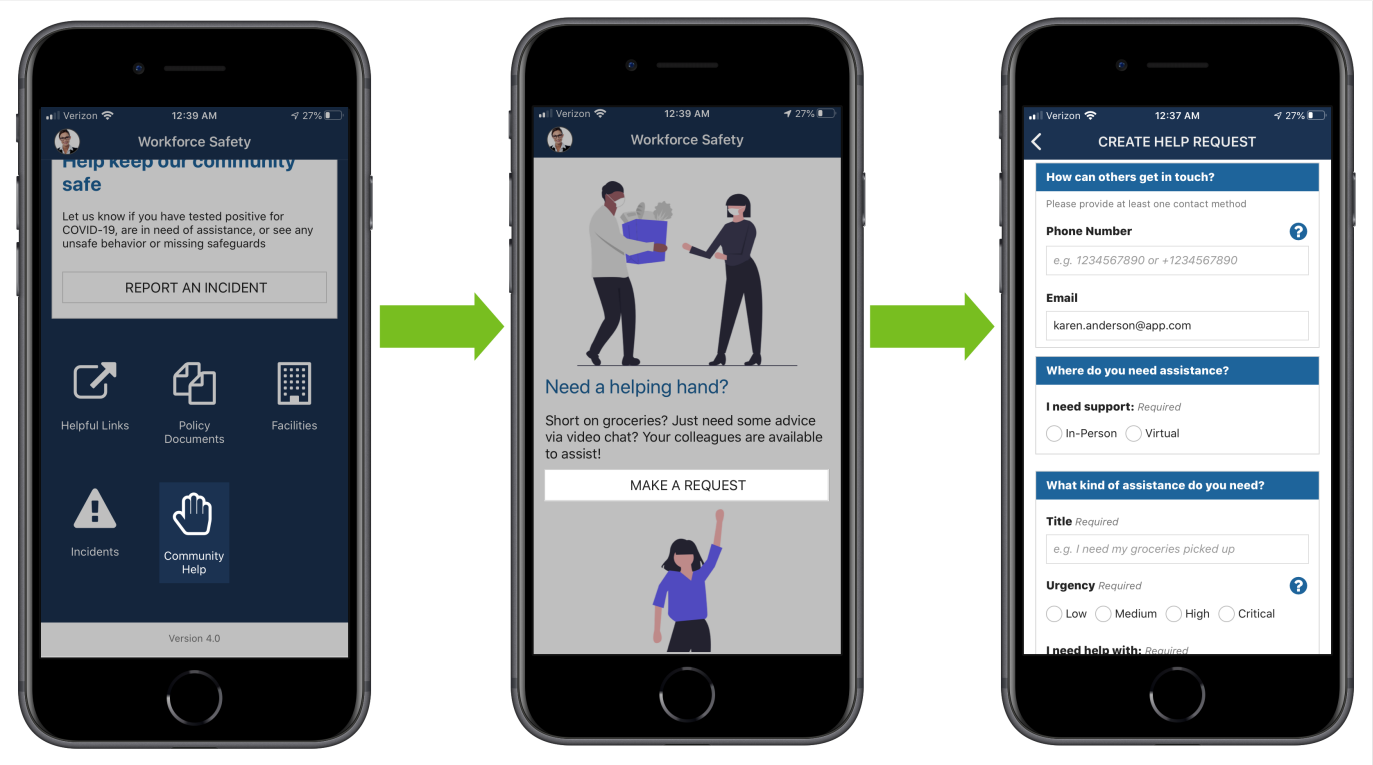



# Using community help

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.

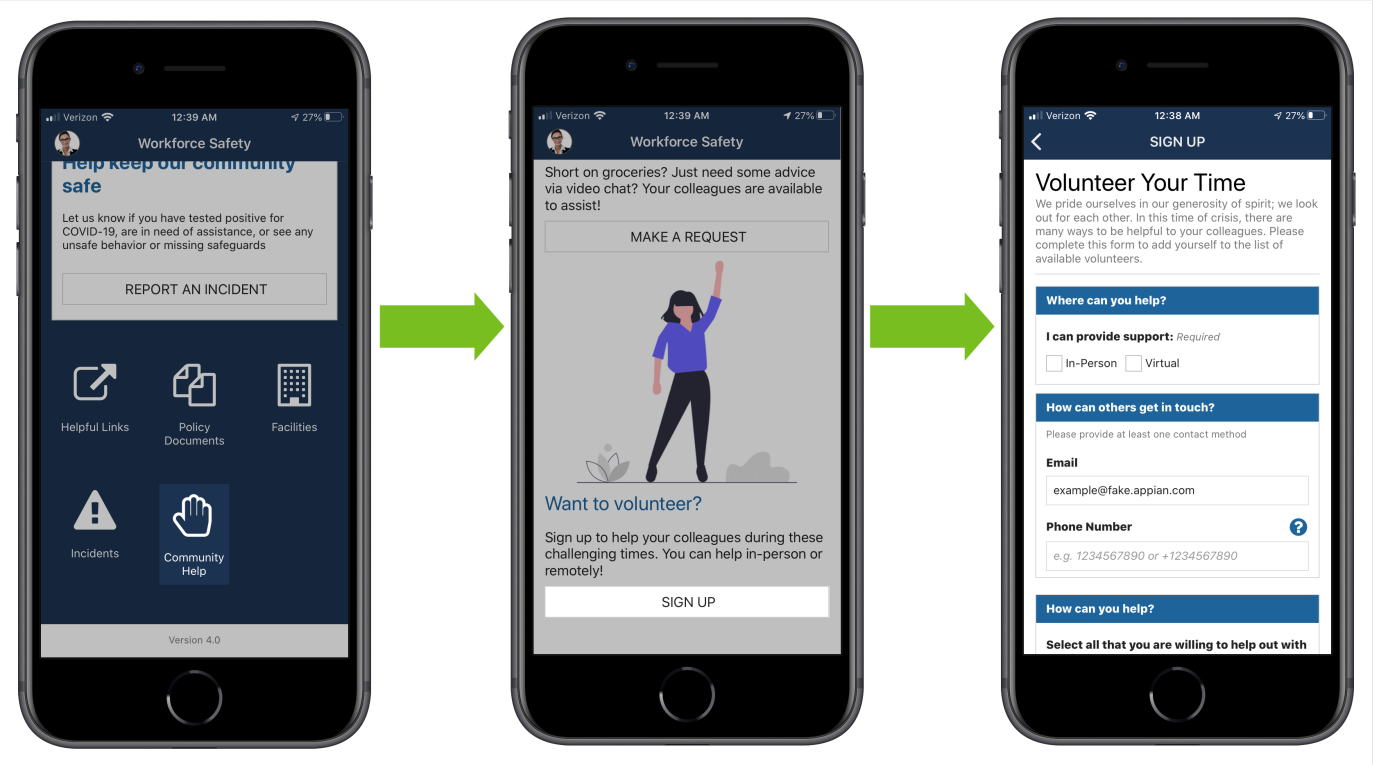
## Requesting help

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.

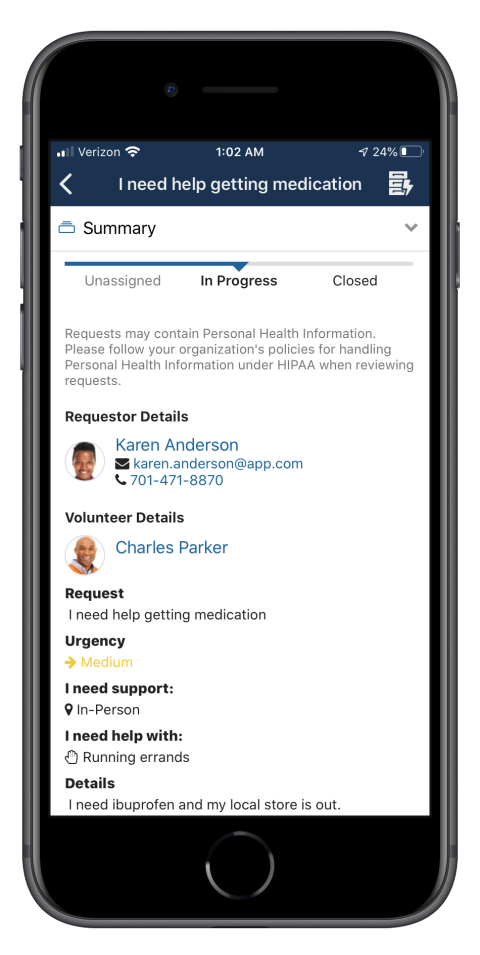



## Signing up to volunteer

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

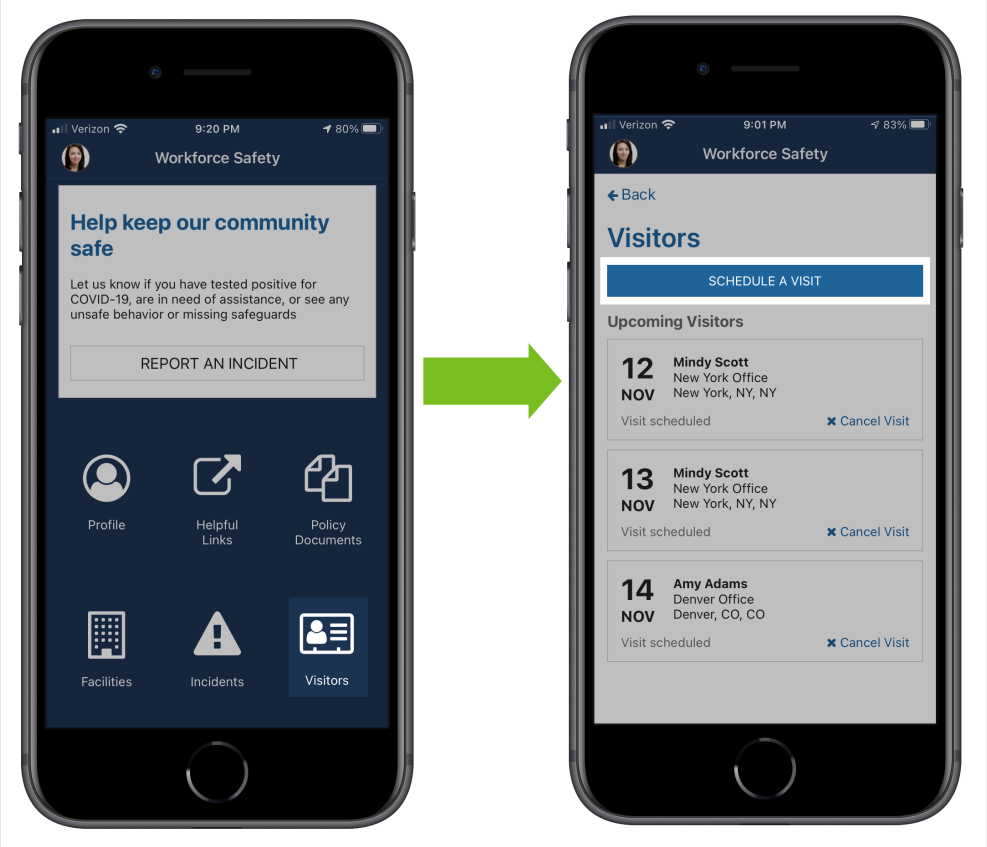
Users can be given access to host visitors. Hosting consists of scheduling visits for visitors and adding new visitors. Hosts can also cancel visits that they have scheduled.

## Scheduling visits

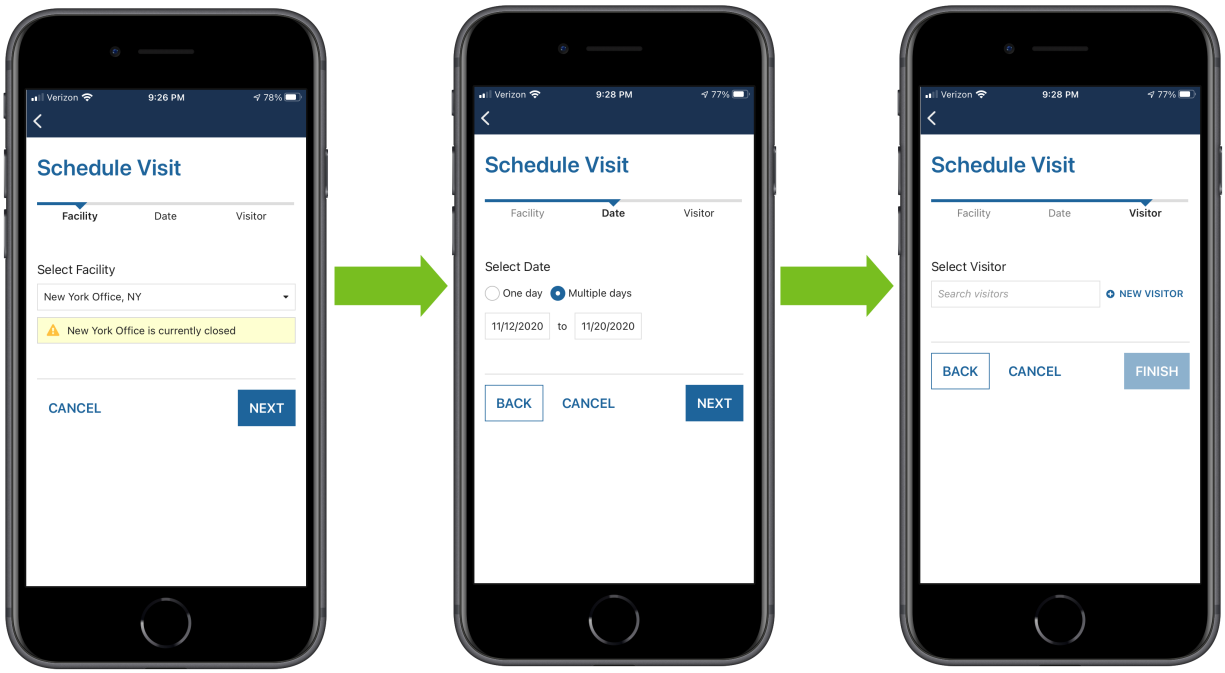
Before a visitor can come on site, they must have a visit scheduled by someone who has been given access to host visitors. All hosts can access this action from the Workforce Safety home page, but screeners and response managers can schedule visits from the Response Hub as well.

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, Reports, and Configure pages.

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

### See also

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

## Response hub personas

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

| Persona | Description | Group |
| --- | --- | --- |
| Response Managers | Response managers respond to incidents and manage COVID-19 testing and contact tracing for their organization. They can also view reports for their people, facilities, and incidents to provide real-time insight into the situation. Additionally, they can tailor the application to suit the organization's needs. | `Workforce Safety Response Managers` |
| Coordinators | If the Community Volunteering and Help Requests feature is toggled on, members of this group can see all incoming help requests and match them to volunteers. They can also view reports to see how they can best distribute resources to those in need. | `Workforce Safety Coordinators` |
| Screeners | Members of this group can scan user passes and request passes on behalf of users. | `Workforce Safety Screeners` |
| Facility Managers | Facility managers can help take on the responsibility of maintaining the facilities, departments, and areas for an organization. | `Workforce Safety Facility Managers` |
| Configuration Managers | Configuration managers can tailor the application to suit the organization's needs without seeing user data. | `Workforce Safety Configuration Managers` |
| Administrators | Administrators can configure Data Management to archive data and can add and remove users from groups. Although they have access to the Response Hub to perform these functions, they can't see any of the data in the Response Hub. | `Workforce Safety Administrators` |

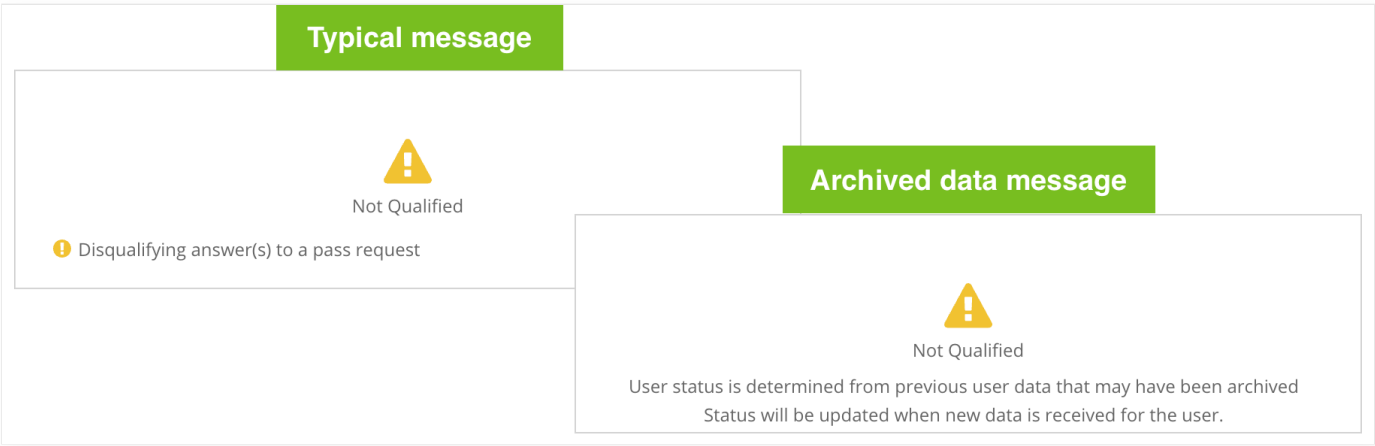
See the Groups Reference Page for more information on which groups have access what content in Workforce Safety.

## Archived data

Administrators can use the Data Management configuration to automatically archive data after a defined period of time. This can optimize Workforce Safety performance and improve the user experience.

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

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

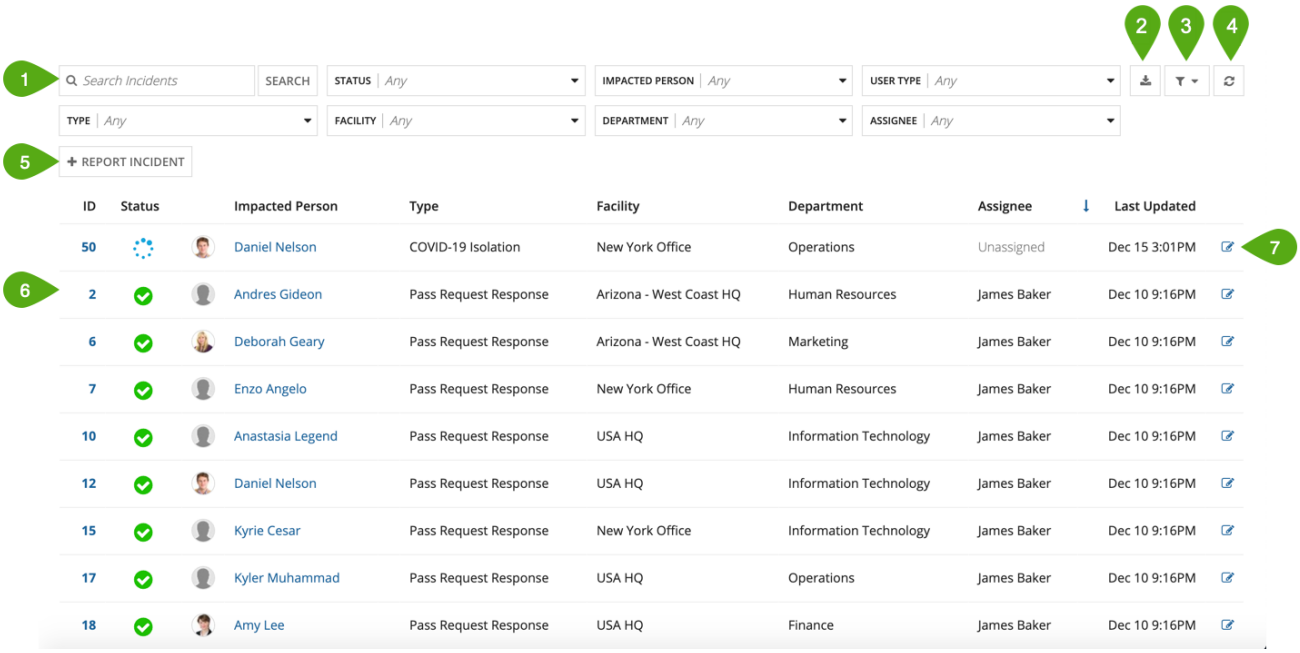



## Manage your incidents

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

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

The **INCIDENTS** page displays when you log in to the Response Hub. From here, you can view all incidents that have been reported for your organization.



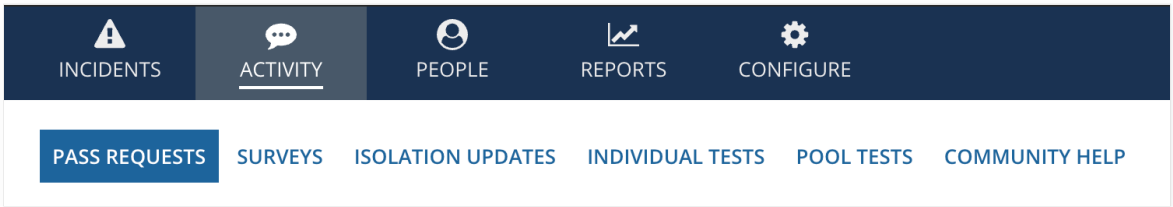

On this page you can:

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

## Keep track of Workforce Safety activities

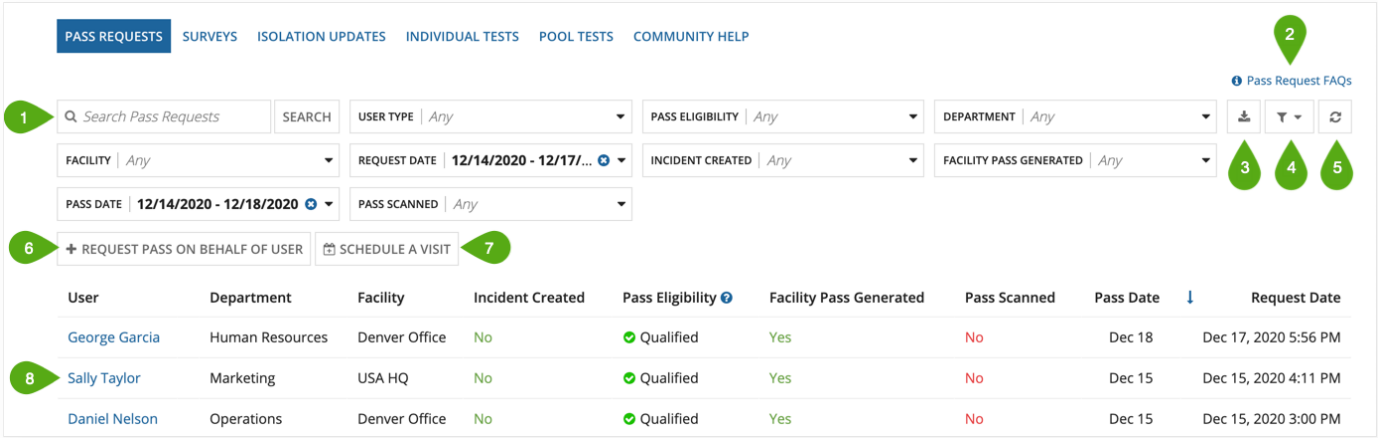
The **ACTIVITY** page houses tabs that contain:

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



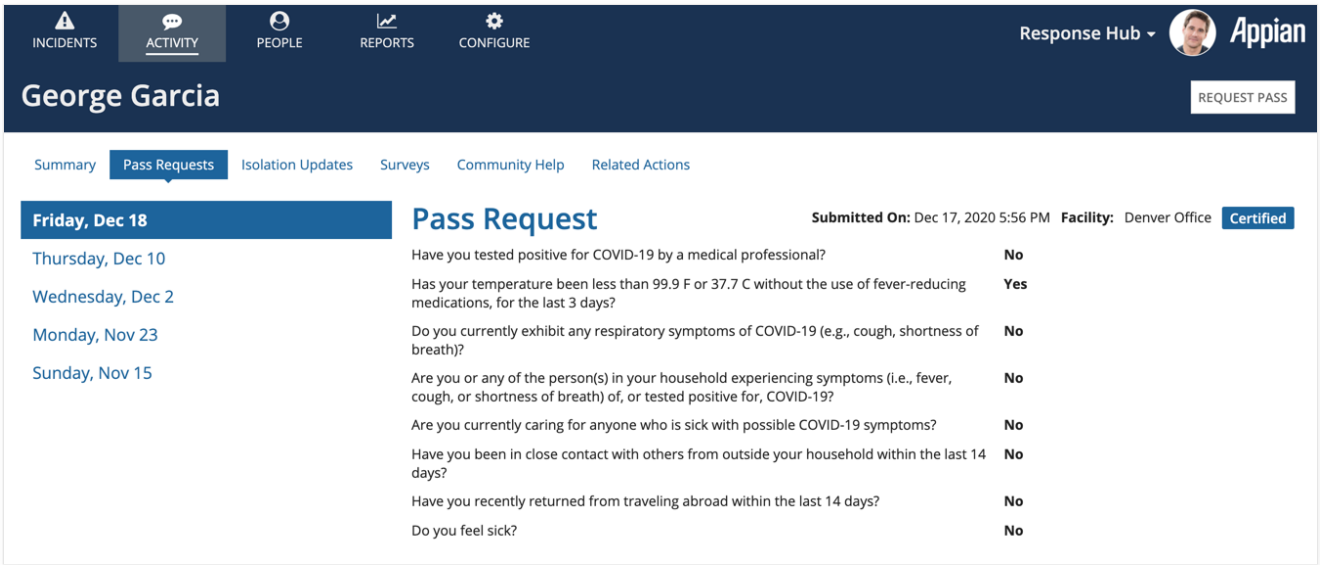

## Pass Requests

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



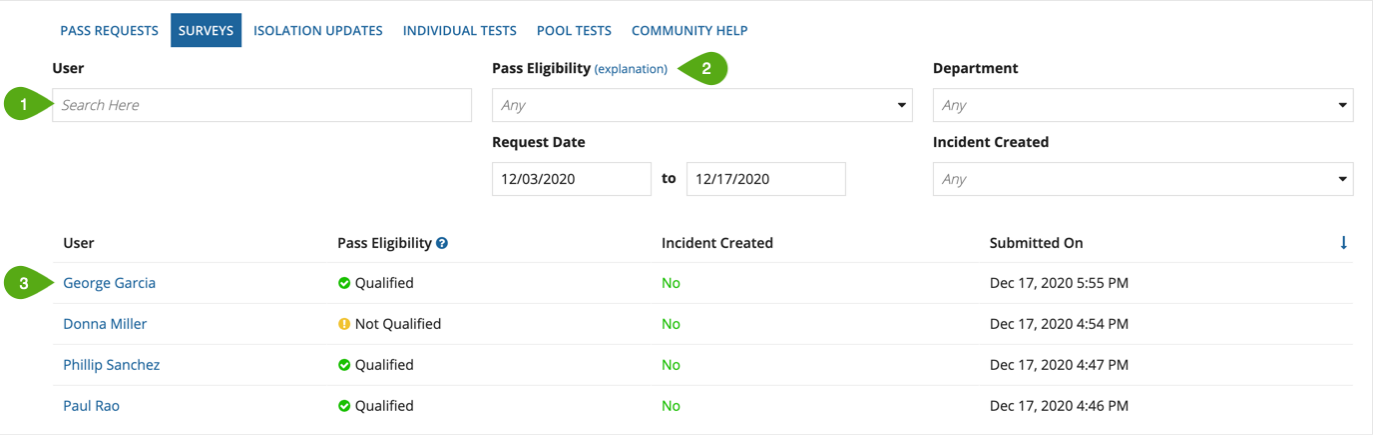

From this tab, you can:

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




## Surveys

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

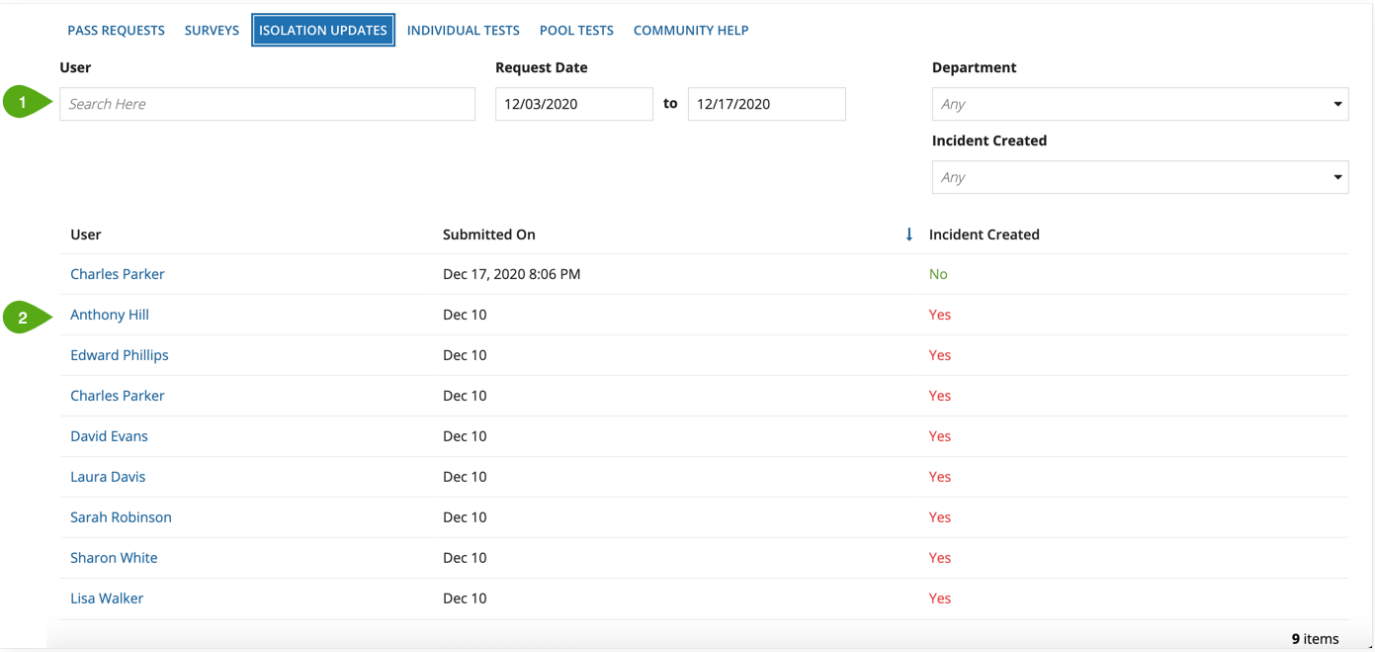



From this tab, you can:

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

## Isolation updates

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

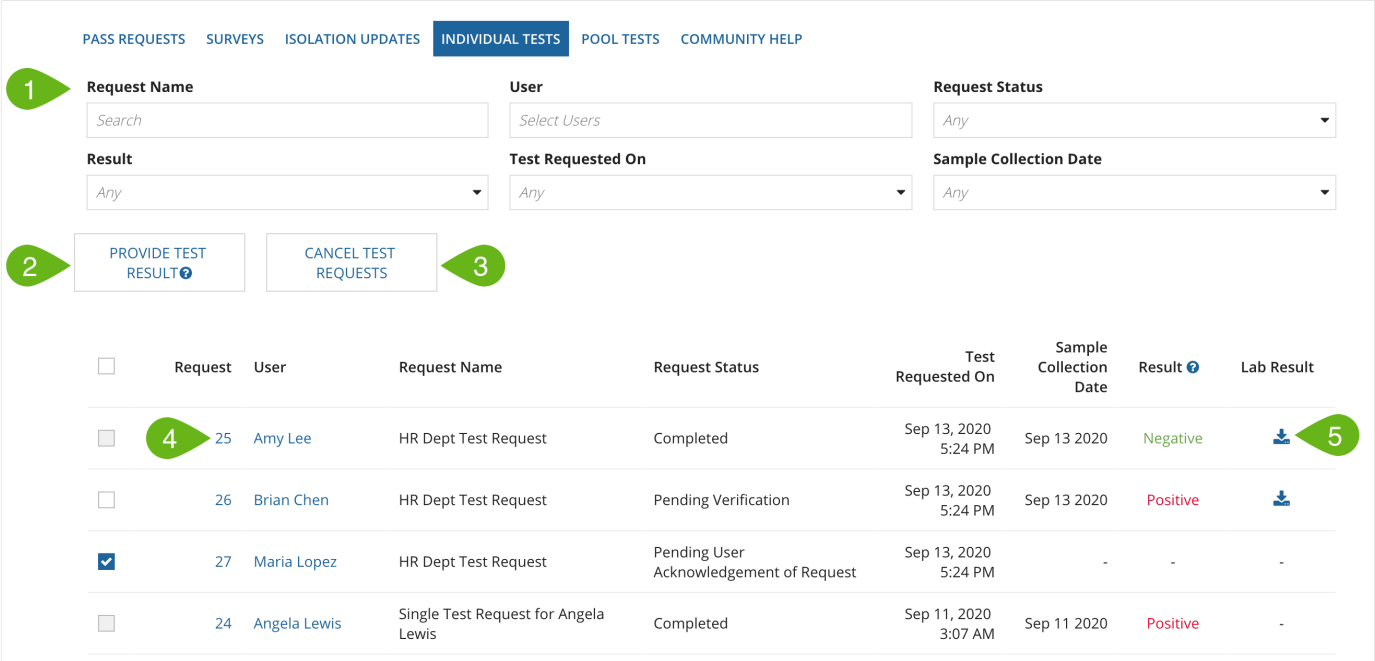



From this tab, you can:

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

## Individual Tests and Pooled Tests reports

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




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.

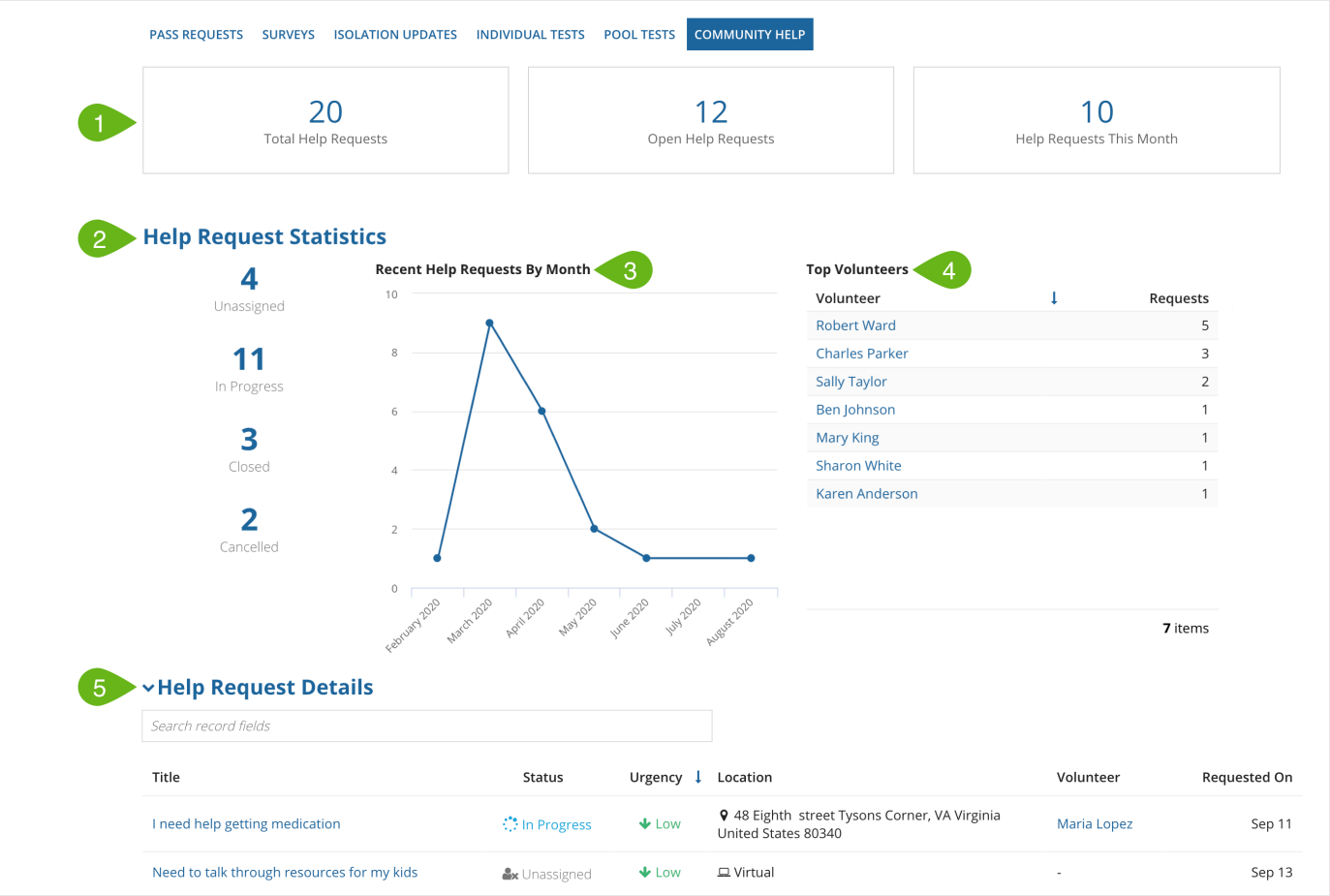
### Testing statuses

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.

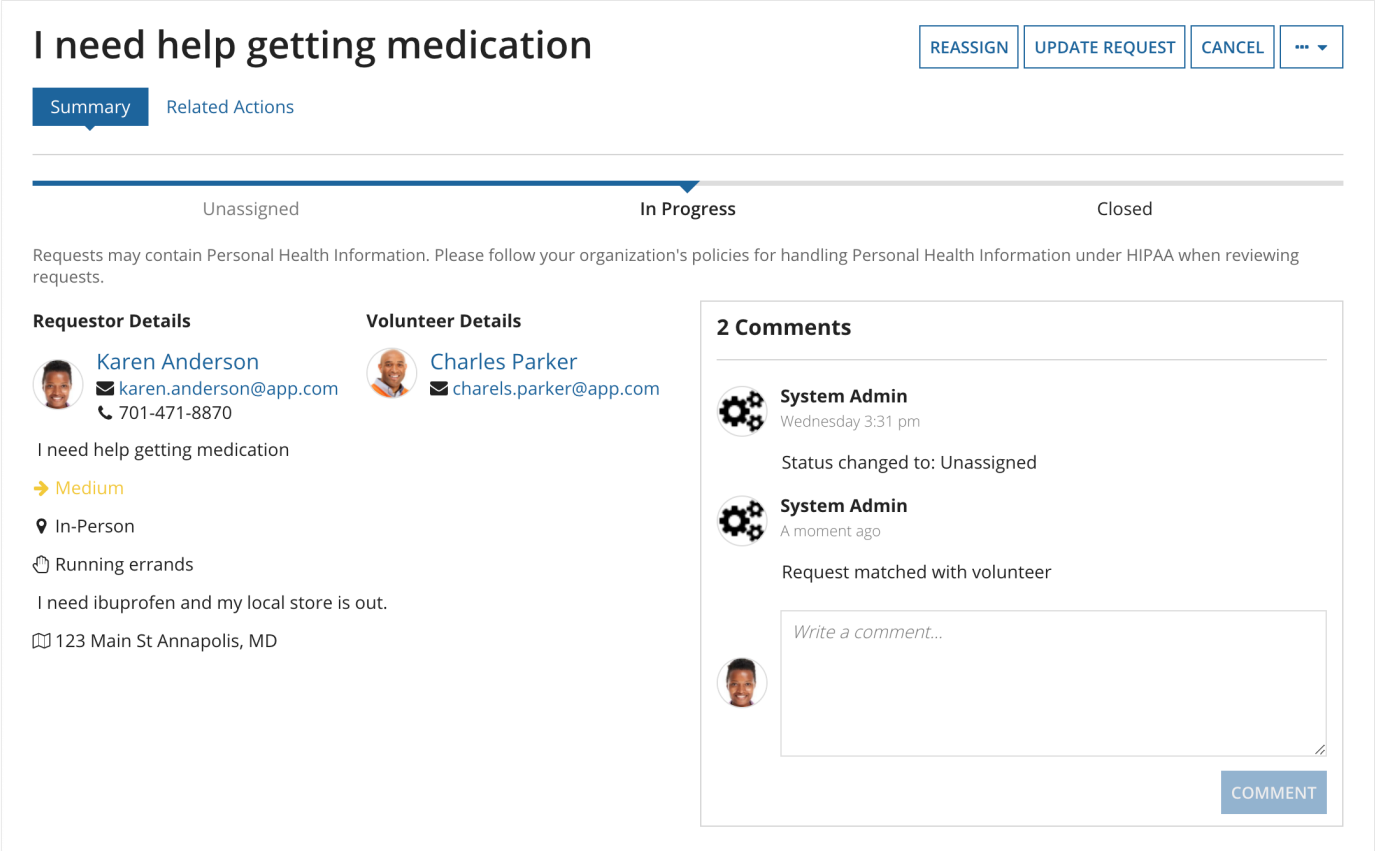



This report shows:

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

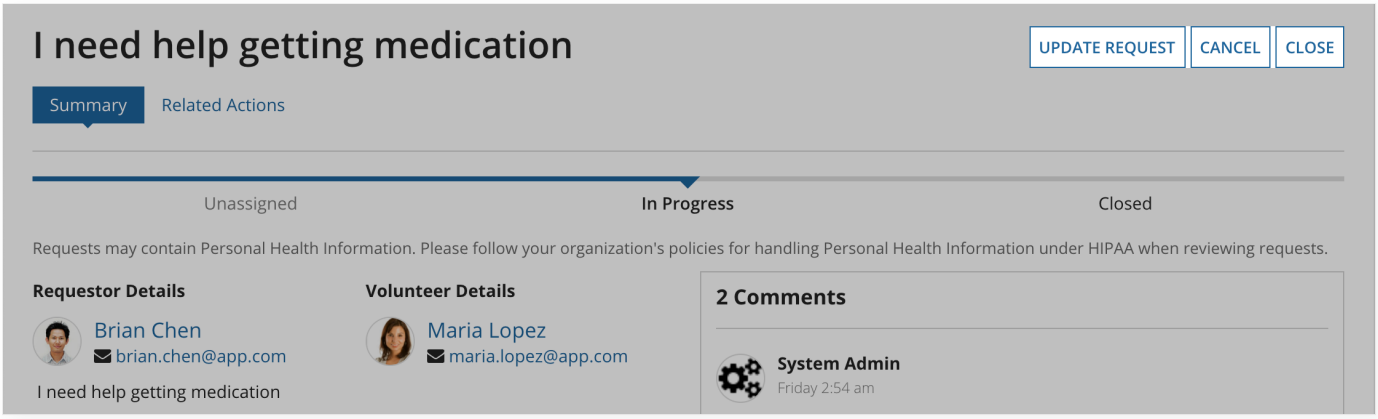
Clicking a help request title displays details of the help request.




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

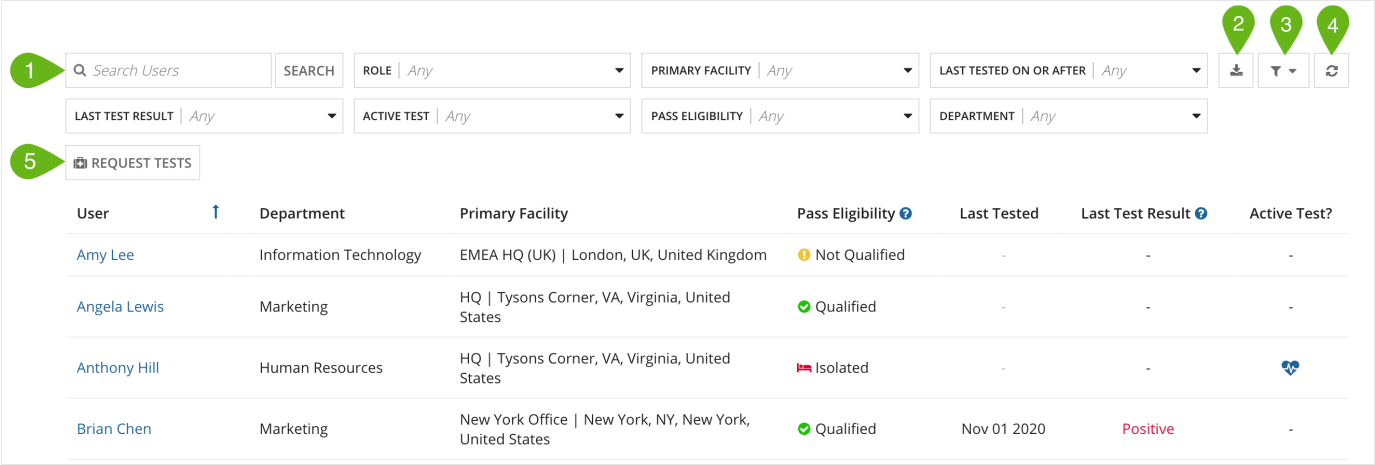
- For *unassigned* requests, you can **MATCH WITH VOLUNTEER** to assign the request to a volunteer.
- For *assigned* requests, you can **REASSIGN** the request to a different volunteer or **CLOSE** the request when it has been completed.

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 in Workforce Safety.




On this page you can:

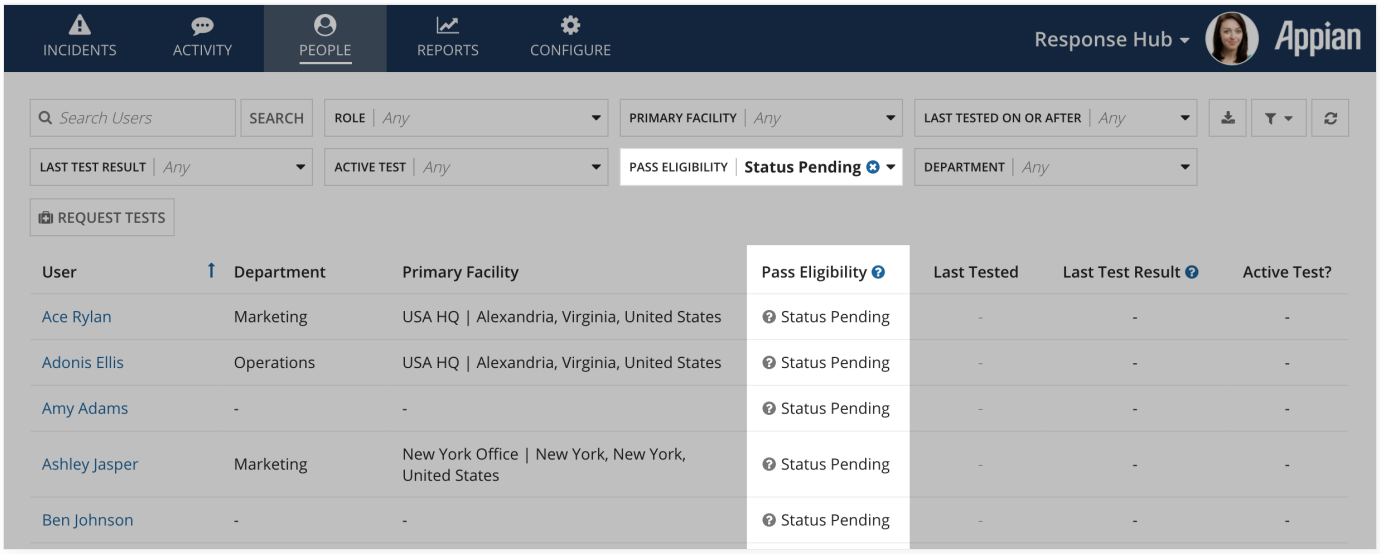
1. Filter the list of users.
2. Export the list to Excel.
3. Save and manage your filters.
4. Refresh the list.
5. Request tests.

## User pass eligibility statuses

Users can have the following pass eligibility statuses:

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

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




## User summary

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

### Summary tab

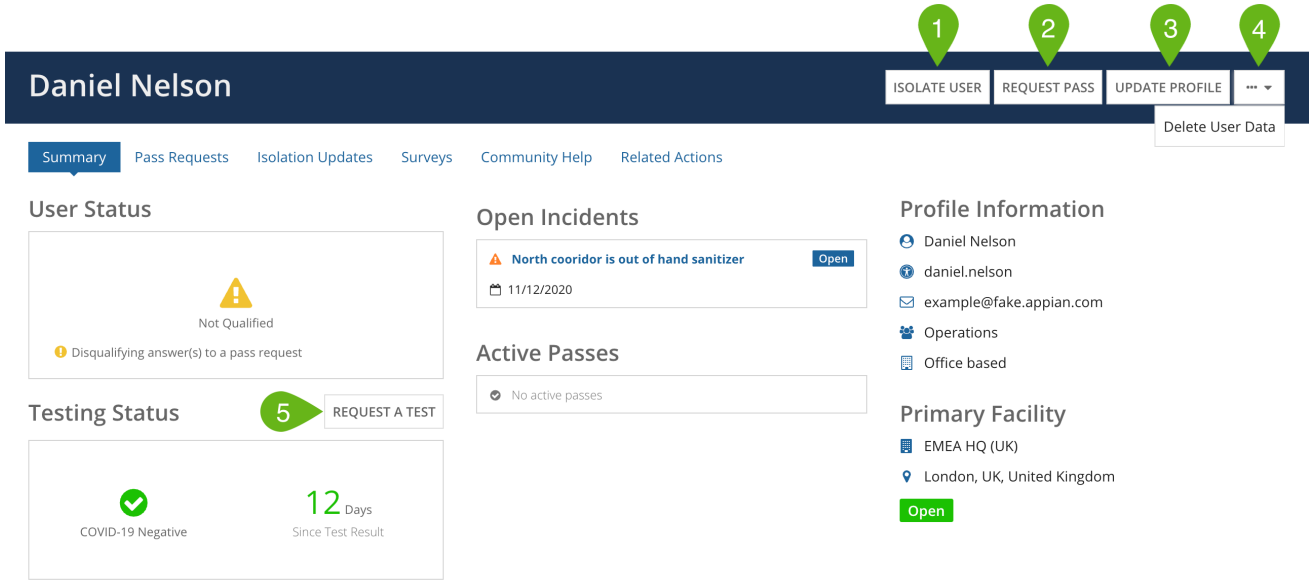
The **Summary** tab contains various information about the user.

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

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

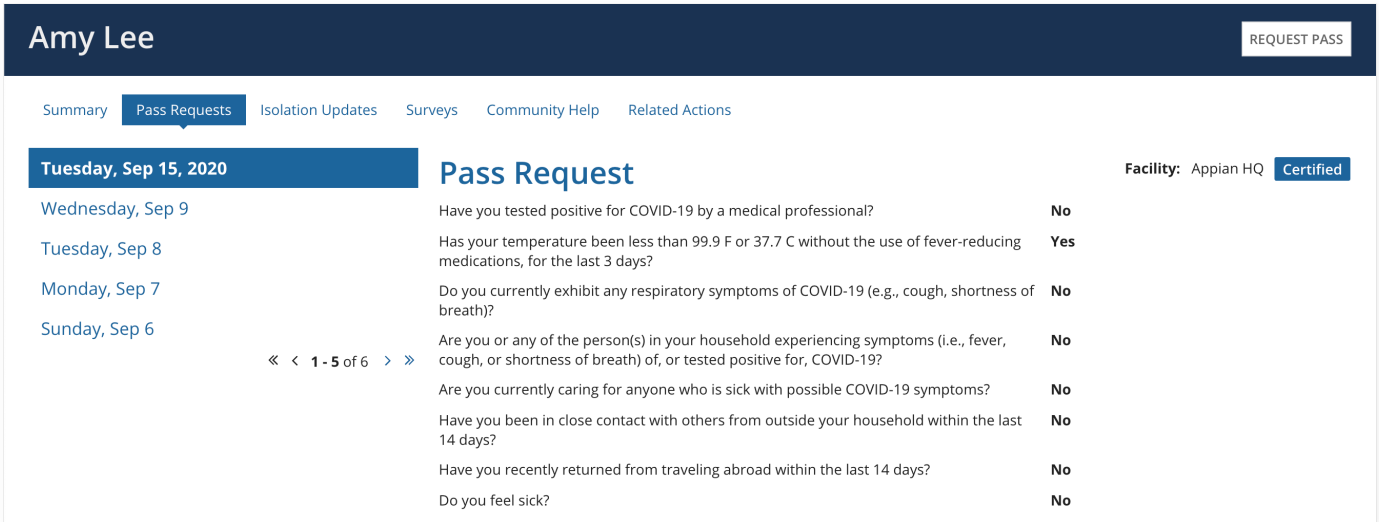
1. **ISOLATE USER**, **REMOVE USER FROM ISOLATION**, or **SKIP SURVEY**, depending on the status of the user.
2. **REQUEST PASS** on behalf of the user.
3. Update the user's profile, which includes the following fields:
    - Position: Full-time remote or Office based.
    - Can you work from home?
    - 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.

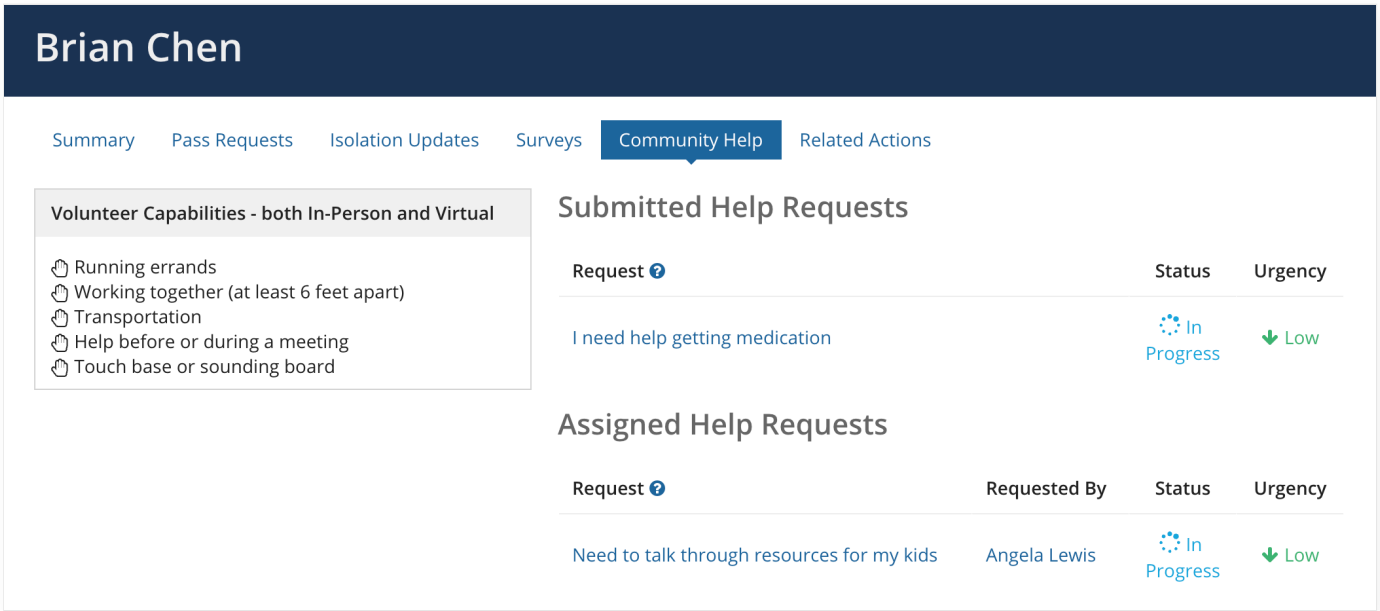



### Community Help tab

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

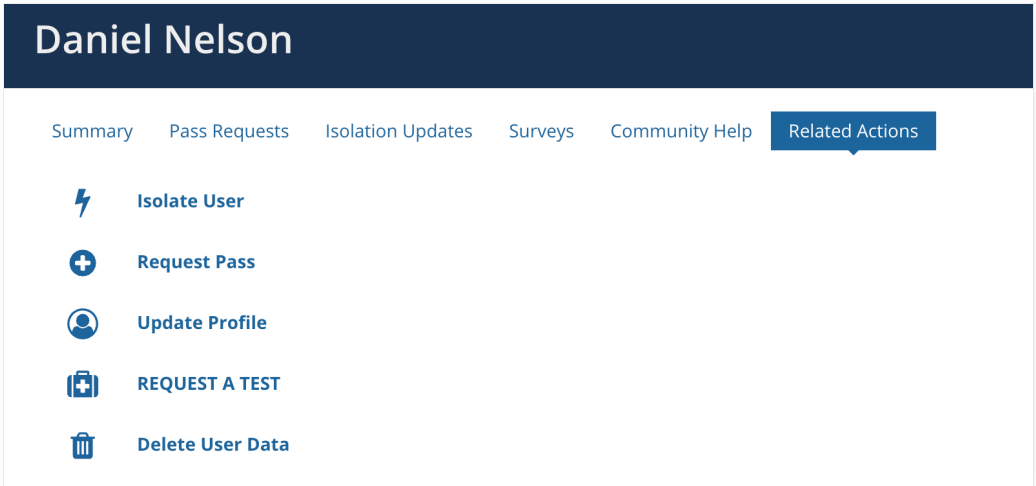
If a user has signed up to volunteer, this tab displays the volunteer categories that they said they could help with along with any help requests that are assigned to them.

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




### Related Actions tab

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




## View your reports

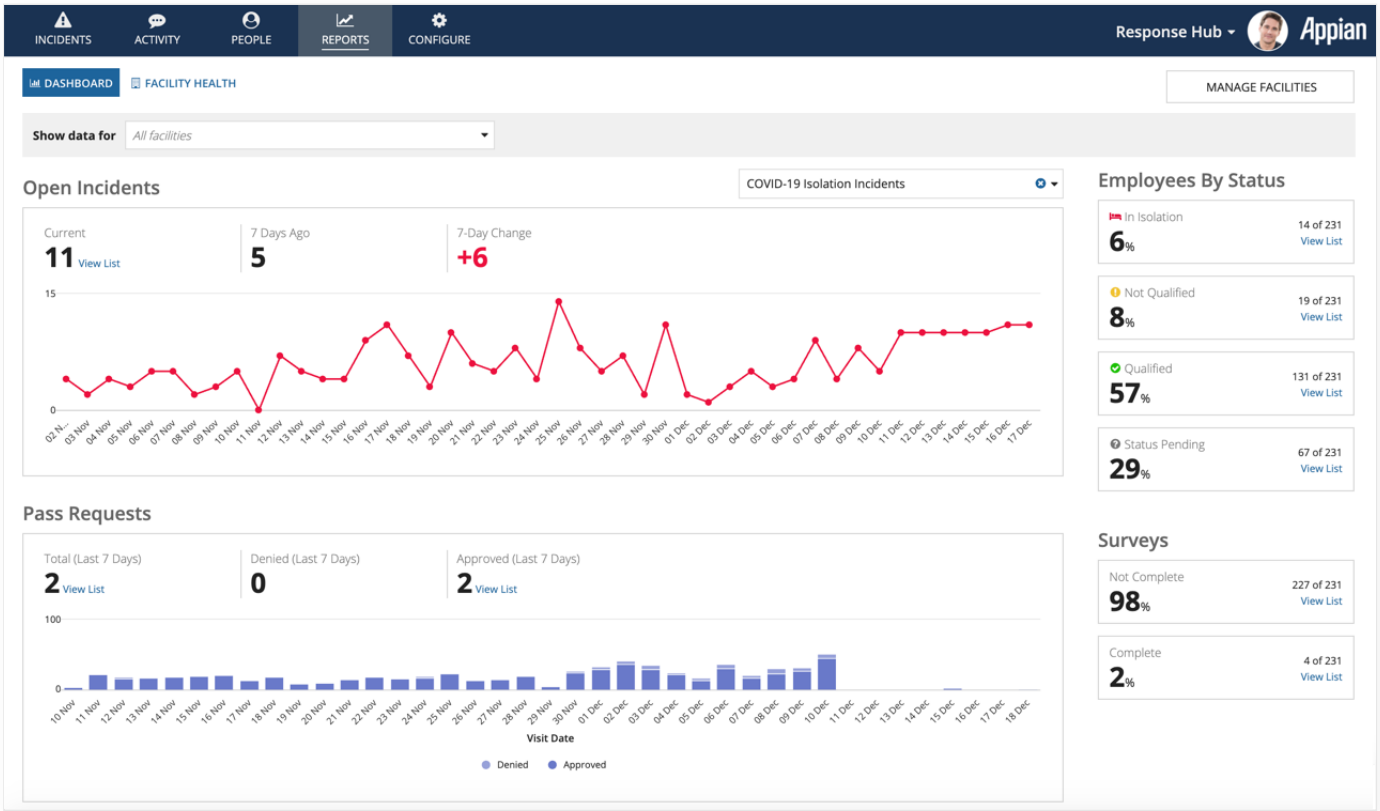
The **Reports** page displays important insights and data about how COVID-19 incidents are impacting the health of your people and your facilities. The data on this page is divided into two tabs:

- **Dashboard Tab**: Displays incidents, people, and activity data for a single facility or multiple facilities in your organization.
- **Facility Health Tab**: Displays status and trend data for a single facility or multiple facilities in your organization.

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

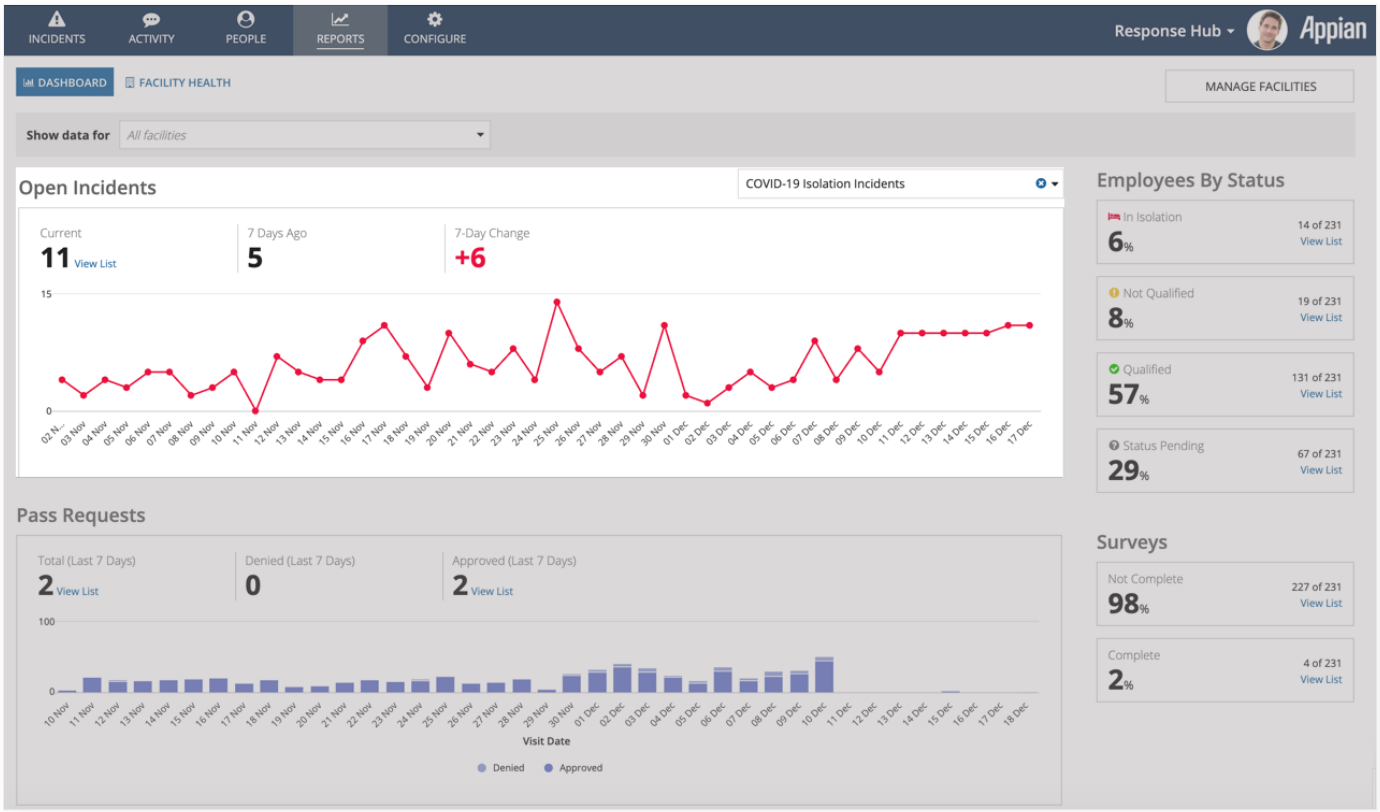
### View the dashboard data

Reports on the Dashboard tab displays provide real-time people and activity data across four critical areas in your organization: **Open Incidents**, **Employees By Status**, **Pass Requests**, and **Surveys**.




## Open Incidents report

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




Use this report to quickly analyze and understand:

- The number of current open incidents across all of your facilities
- Hotspots for COVID-19 isolation incidents across your organization
- Changes in open incidents across a 7-day period

- The number of open incidents at a given point in time
- Open incident trends for a given period of time

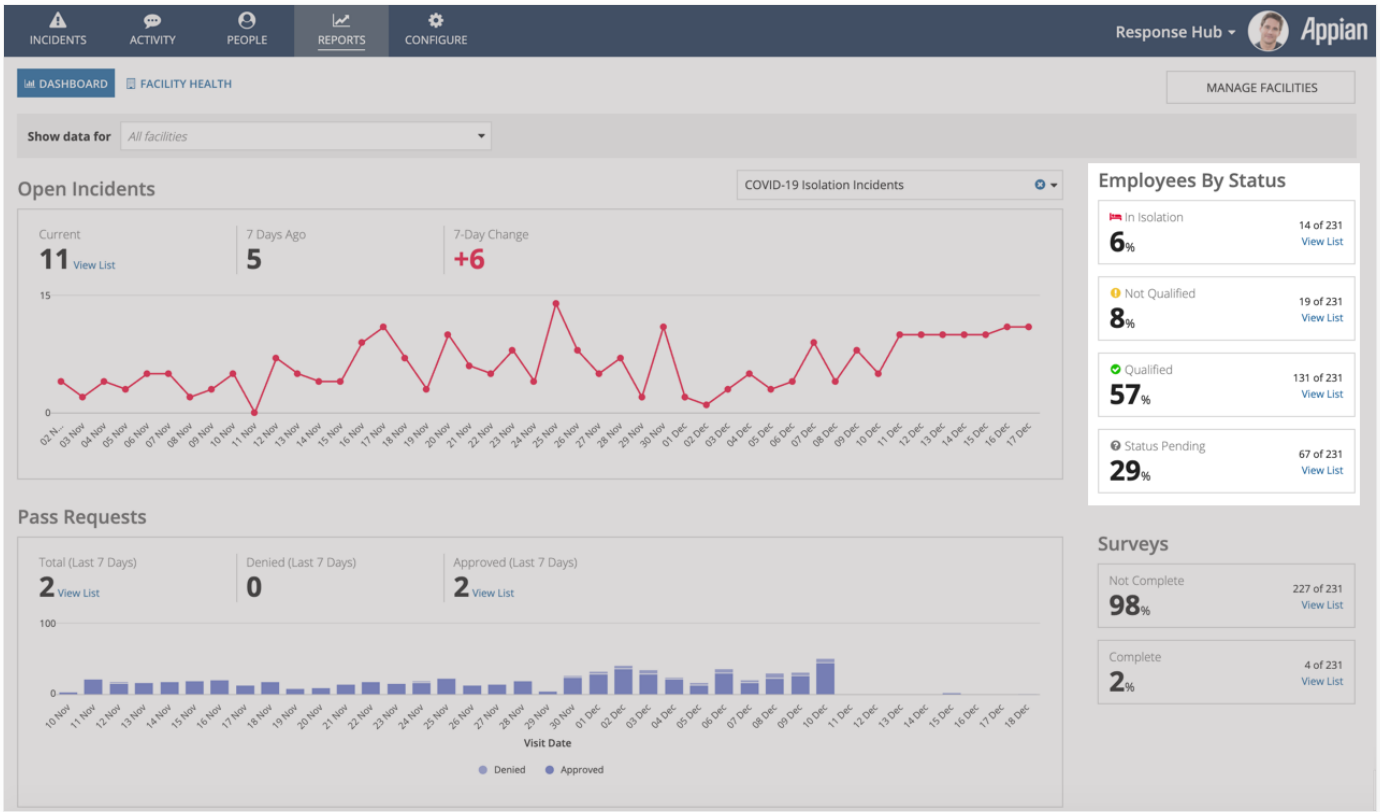
View only the data for the facilities you want to see by selecting one or more facilities in the **Show data for** dropdown. Use the **Incident Types** dropdown to filter the **Open Incidents** report and track different incident types.

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

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

### Employees By Status report

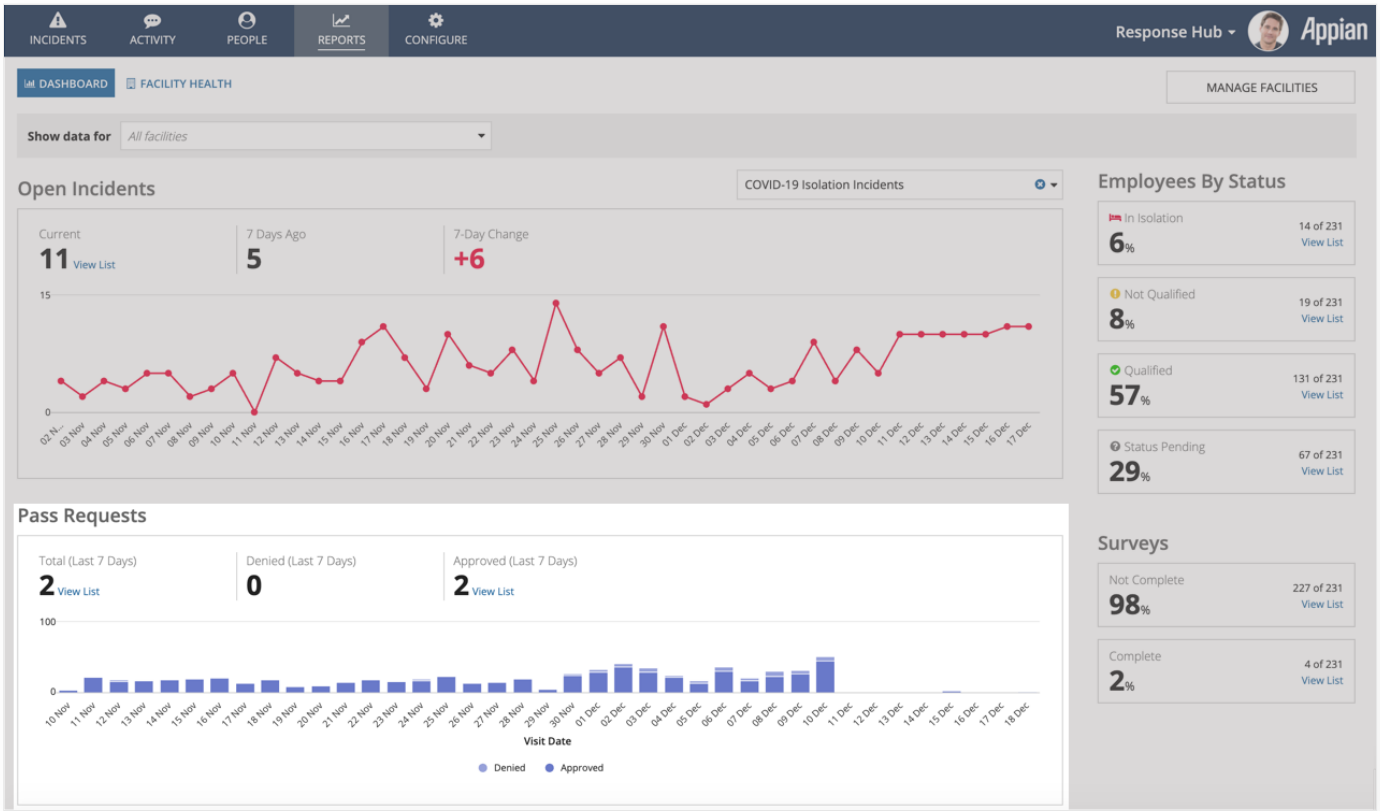
The **Employees By Status** report allows you to see a breakdown of all of your users by their pass eligibility status, excluding visitors.




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

### Pass Requests data

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



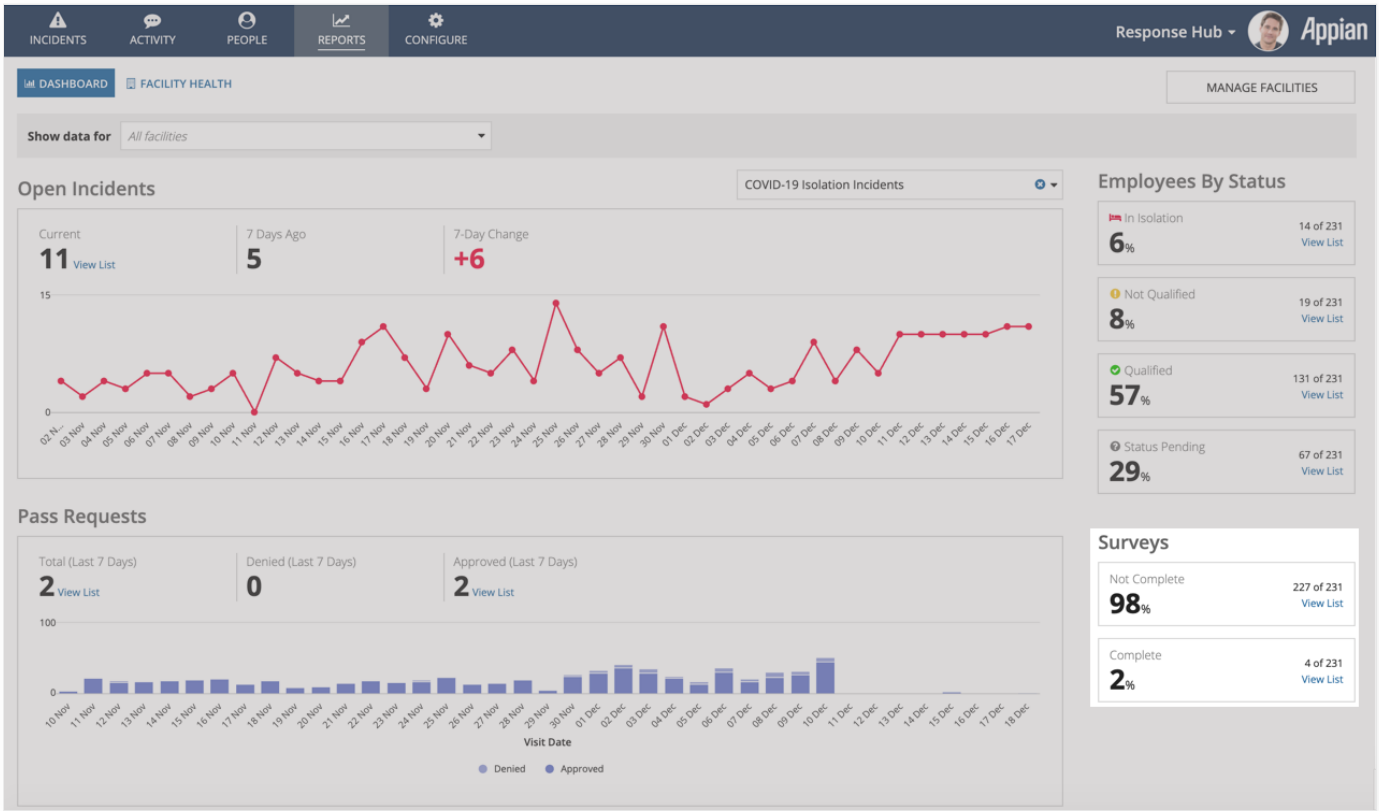

From this section, you can:

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

The **Show data for** filter at the top of the page allows you to filter this data to see only the pass request data for the facilities you want to see.

## Survey data

Take a look at the **Surveys** section when you want to identify the percentage of users in your organization that have completed the active survey.

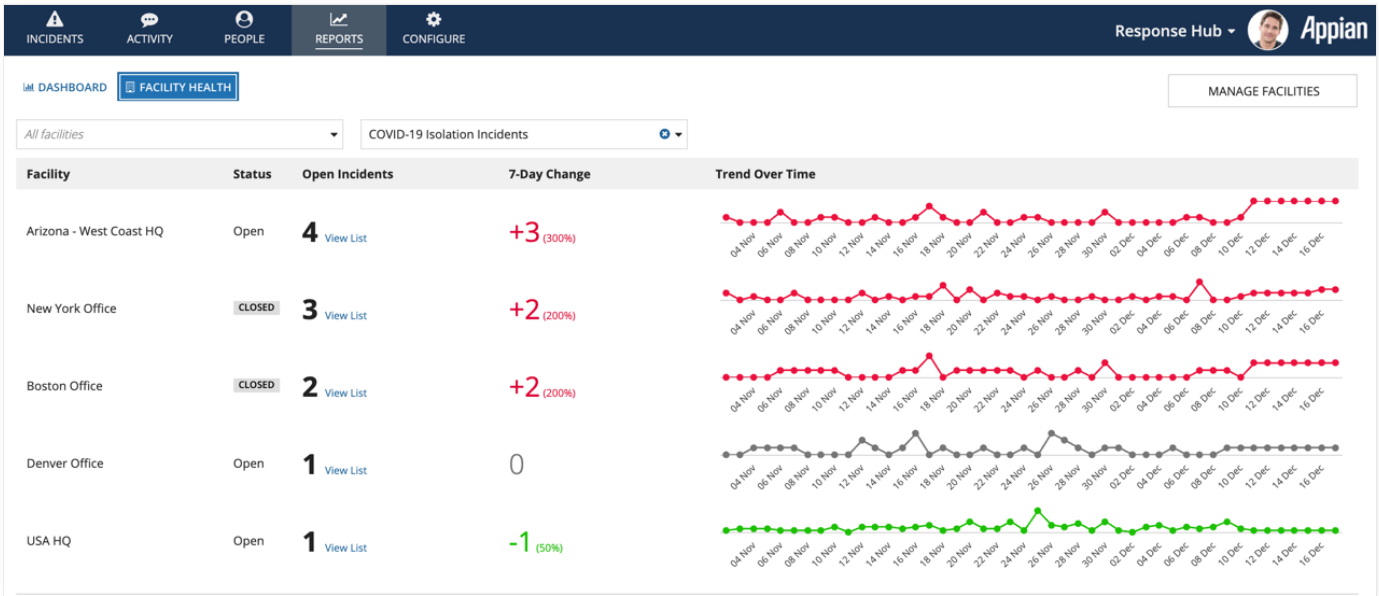



Use the **Show data for** filter at the top of the page to filter the data in this section by facility and click **View List** to access an exportable list of survey data.

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

## View your facilities health data

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



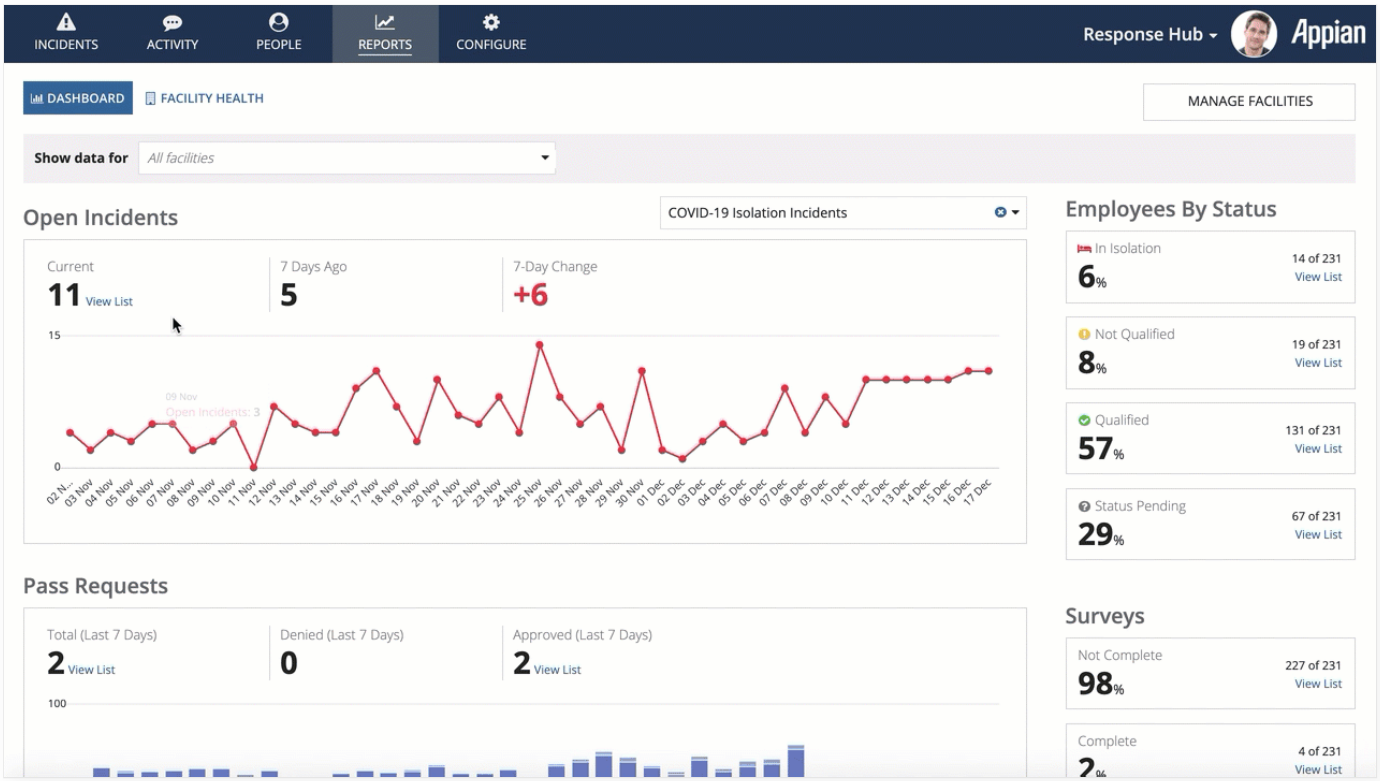

This report ranks your facilities by the number of open incidents, and lists each facility with the following information:

- Status
- Open incident count
- 7-day change rate
- Incident trend line chart

Use the **Facility** filter to analyze and compare incident trends across specific facilities in a region. Use the **Incident Type** filter to see the trends for a specific incident type. Click **View List** to view an exportable list of incidents behind the open incident count.

### Manage your facilities

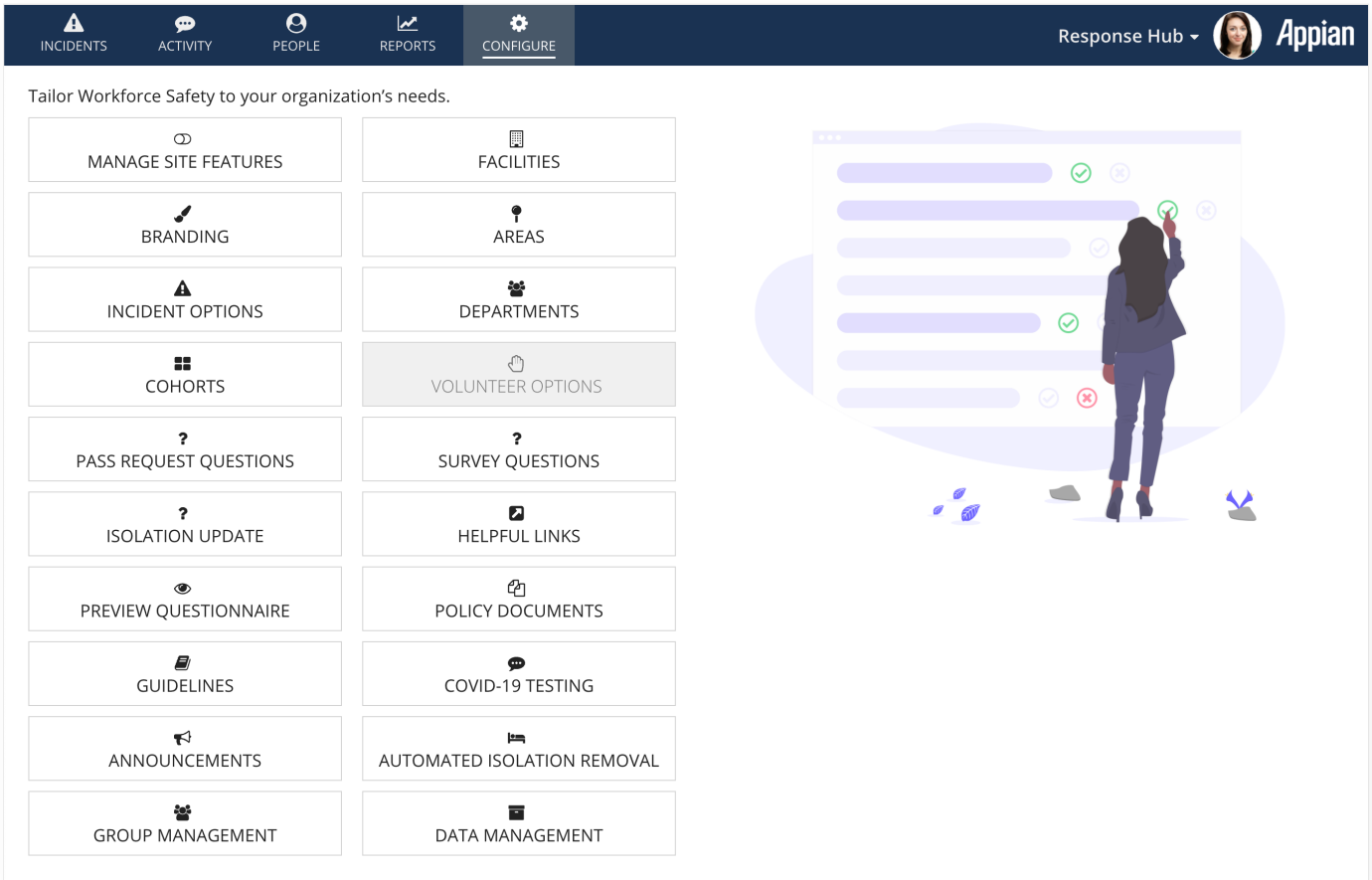
From the **Reports** page, you can also manage your facilities by adjusting the operating hours for a specific facility, updating visitor arrival instructions, and adding a location from your organization's facility list.




## 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.

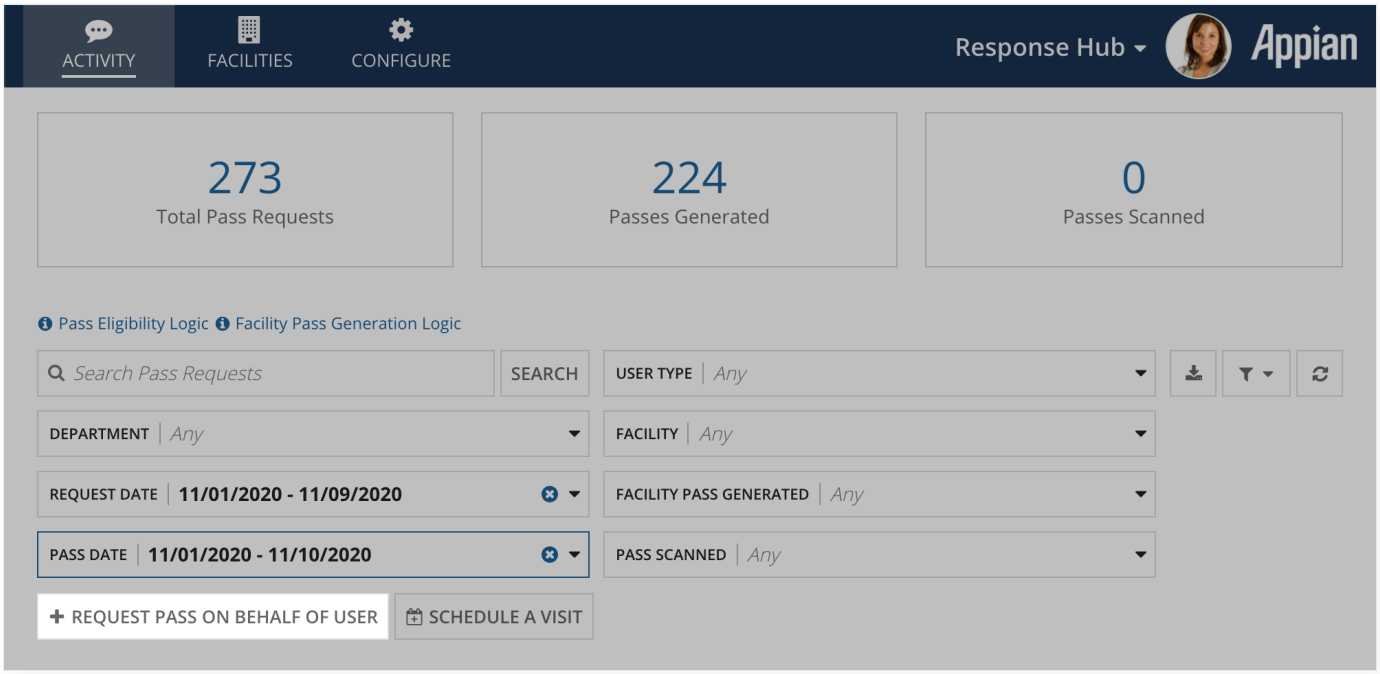
This page outlines how response managers, screeners, and coordinators use the Response Hub to manage crises.

### See also

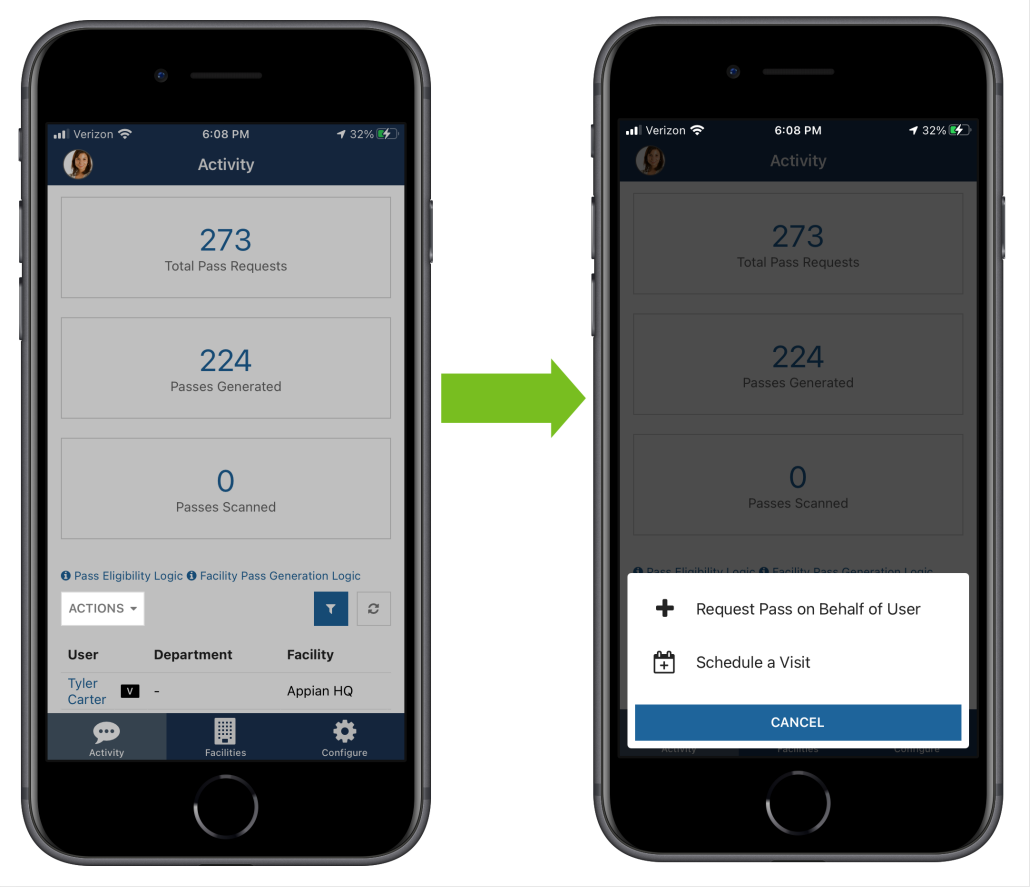
- For an overview of the Response Hub, see the Response Hub Overview.
- For instructions on how Response Hub users can configure Workforce Safety, see the Configuration Guide.
- For a list of what actions and information users have access to in the Response Hub, see the Groups Reference Page.
- For instructions 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**.

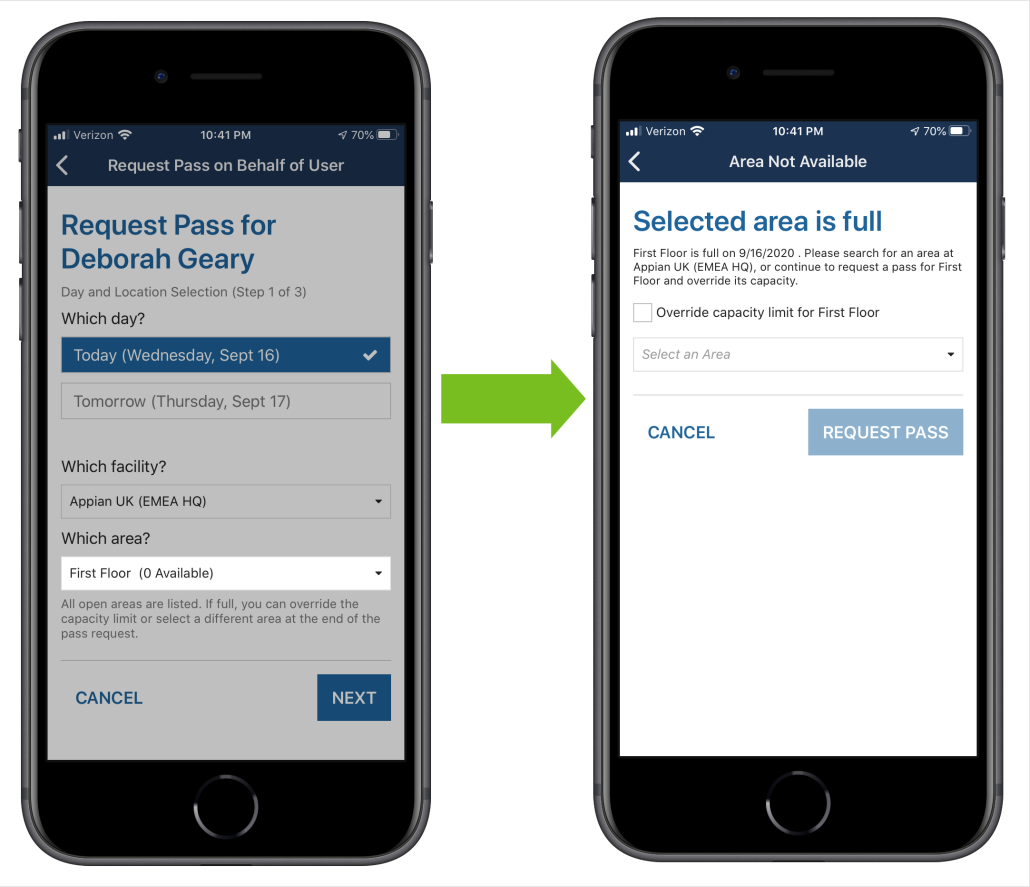



Screeners can also request passes for visitors, but the visitor must have a visit scheduled first. See On-site registration process for more details on this process.

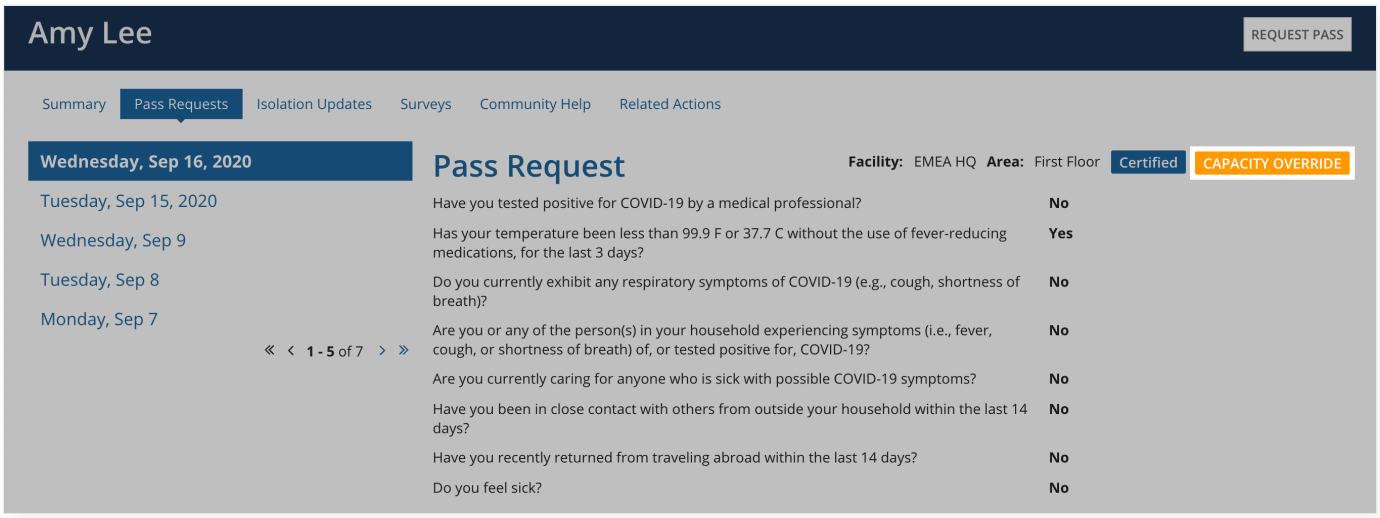
Note that capacity restrictions and cohorts do not apply to visitors.

If Enforce Area Capacity Restrictions is toggled on, an area selection will display on the pass request.

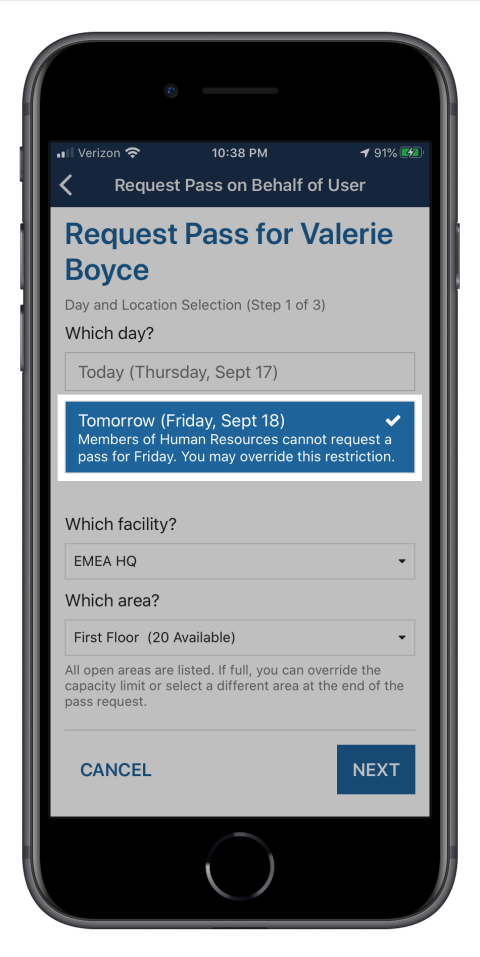
Response managers and screeners will see the remaining capacity for each area. If an area is full, they can still select the area. At the end of the pass request, they will be asked to override the capacity restriction, or select another area.



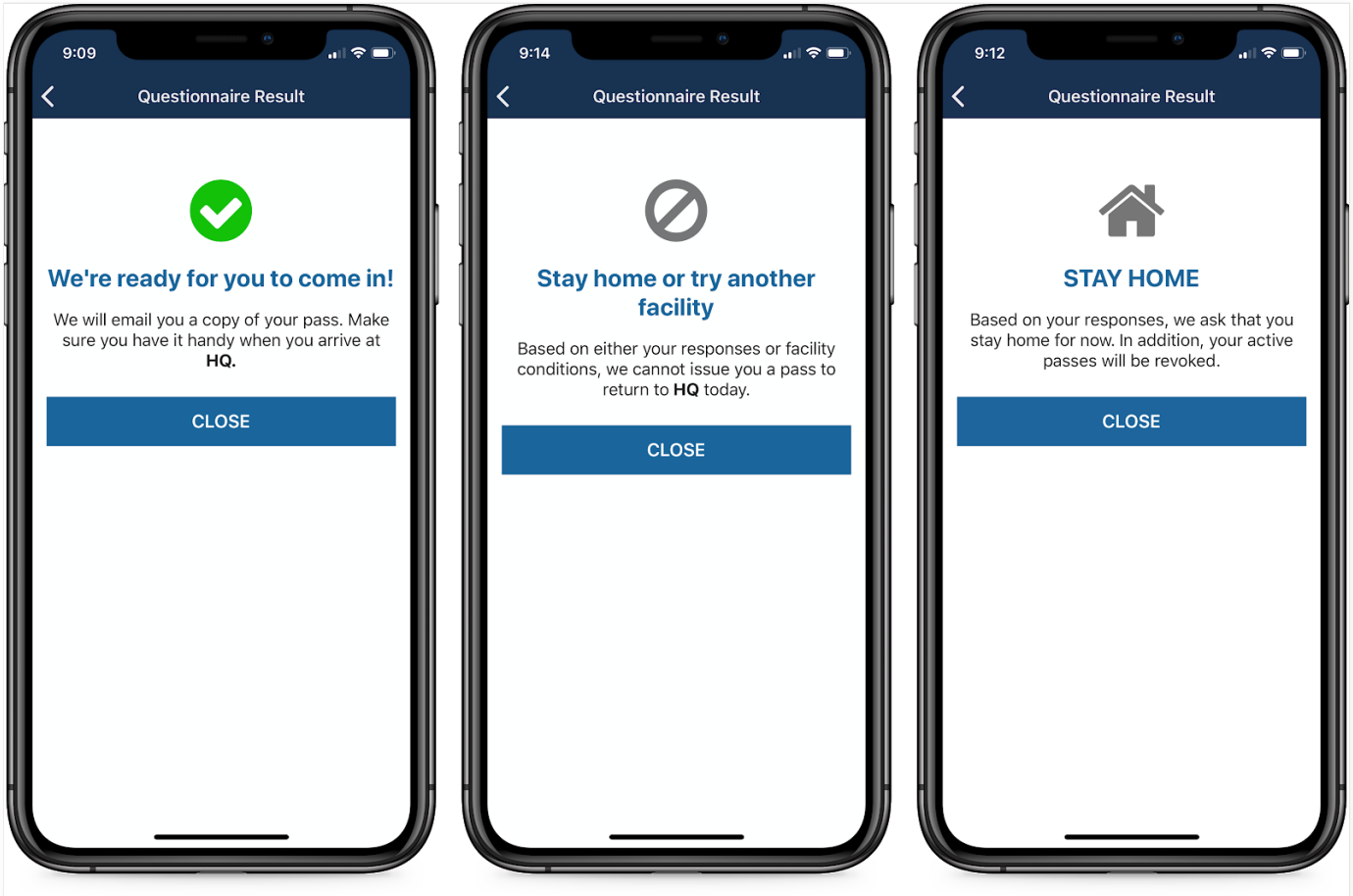

If capacity restriction is overridden, it will display on the user's Pass Request tab for that pass request.




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.

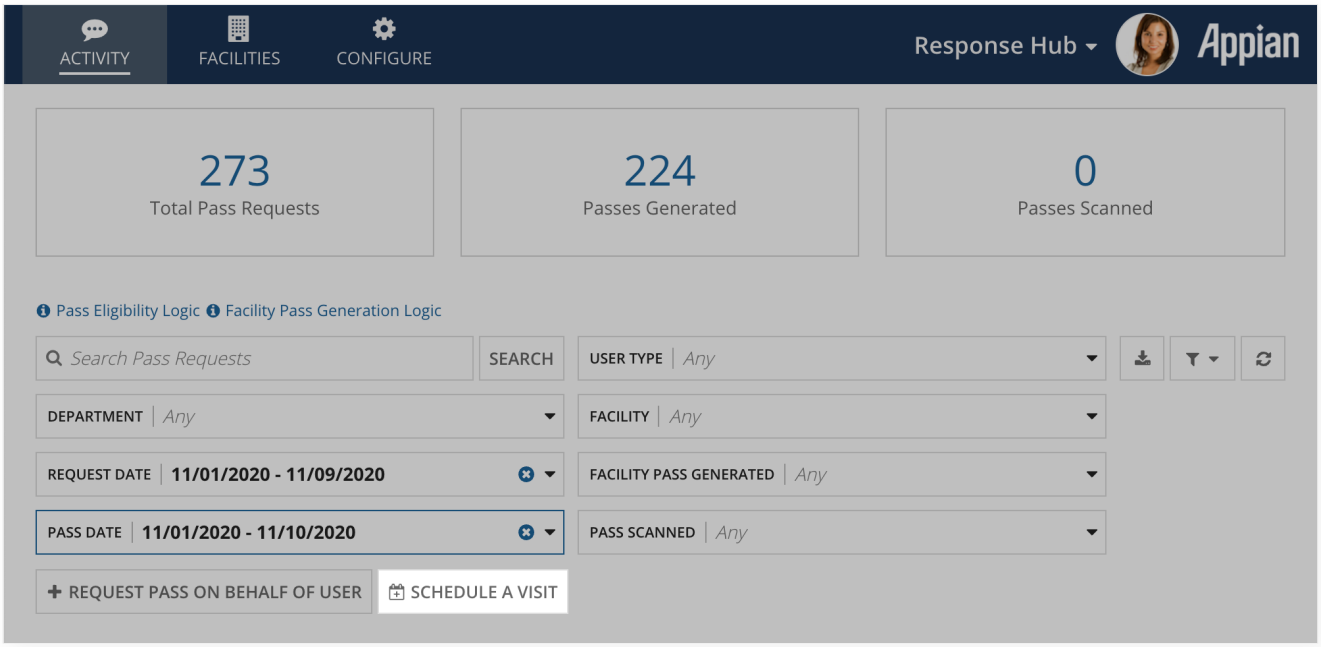



## Scheduling a visit for visitors

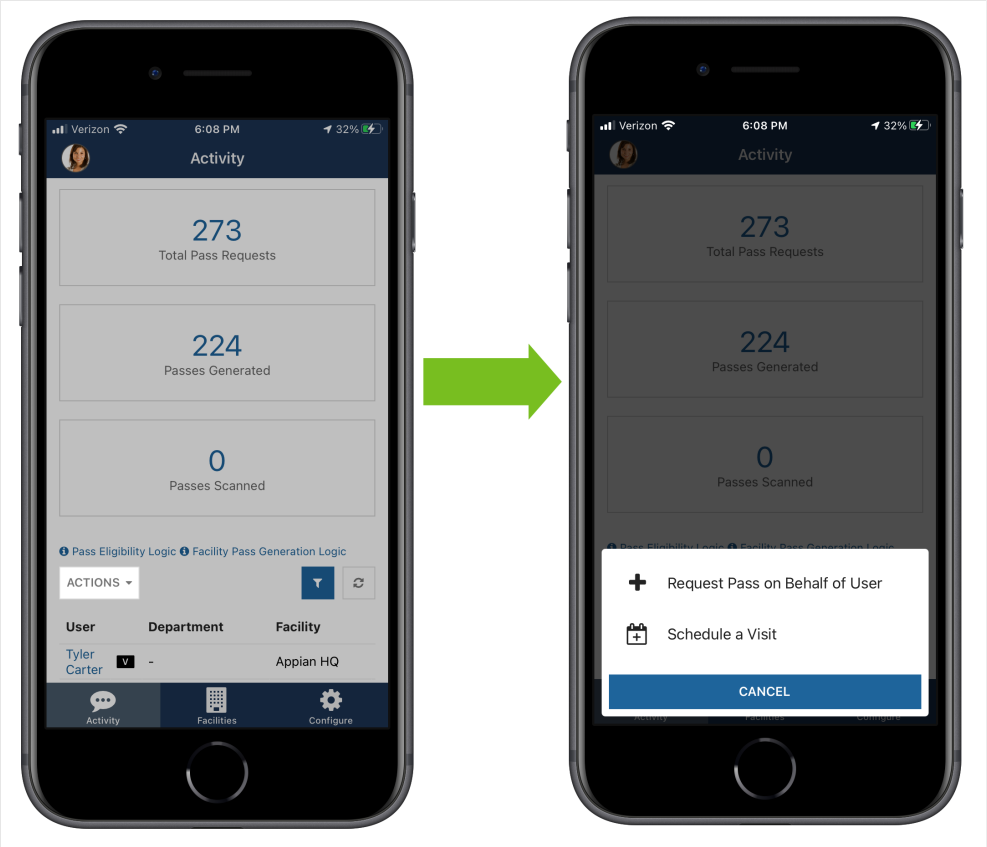
Screeners and response managers can schedule a visit for visitors in the Response Hub. Visitors must have a visit scheduled before a screener can request a pass for them. See Managing Visitors for more information on visitors.

To schedule a visit from the Response Hub:

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




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



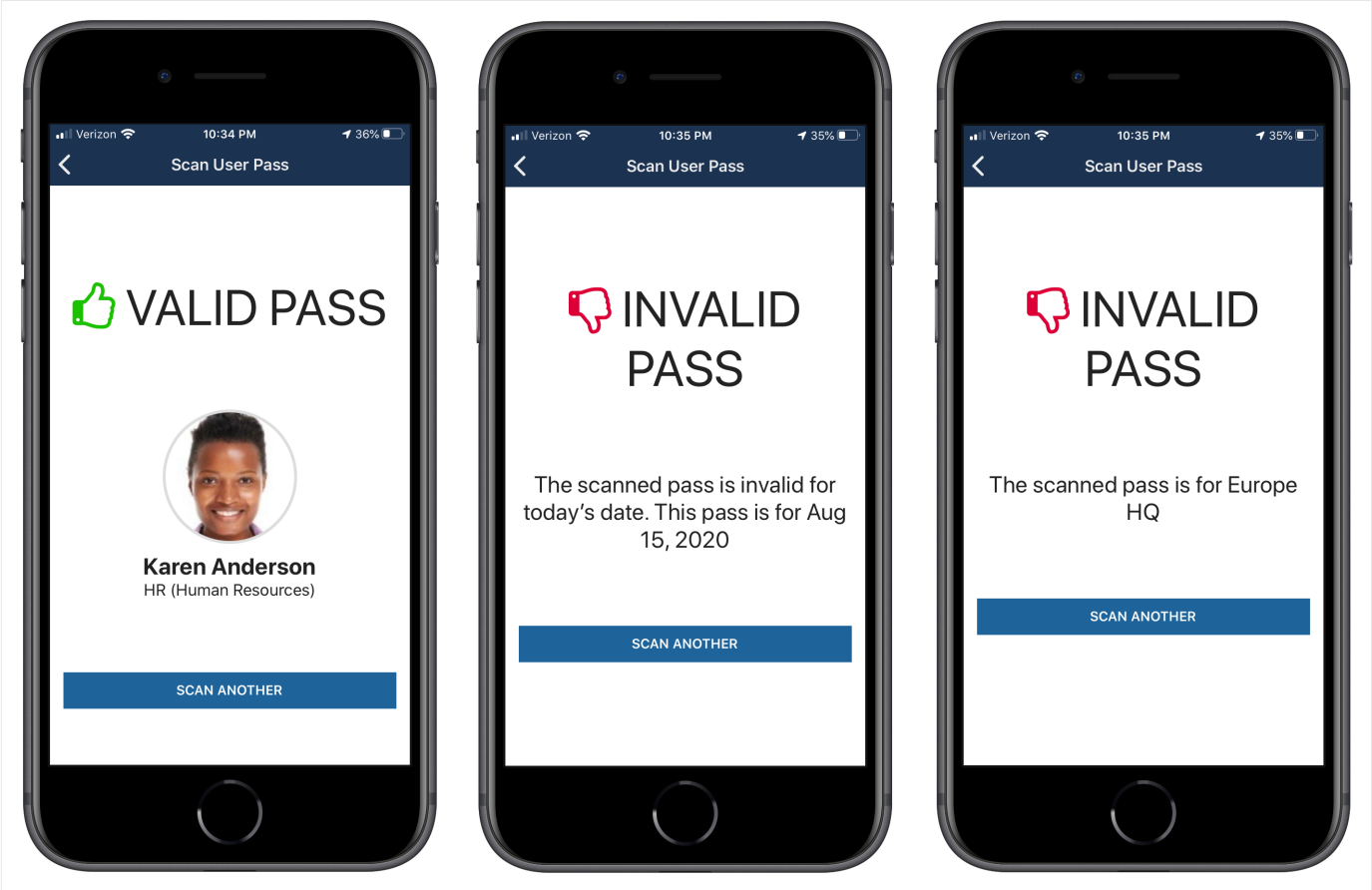

3. Select a facility and click **NEXT**.
    - **Tip**: You can select closed facilities since some visitors, such as cleaning and maintenance crews, may still need access to facilities that are closed.
4. Select the day or day range that the visitor should be able to visit and click **NEXT**.
5. Select 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

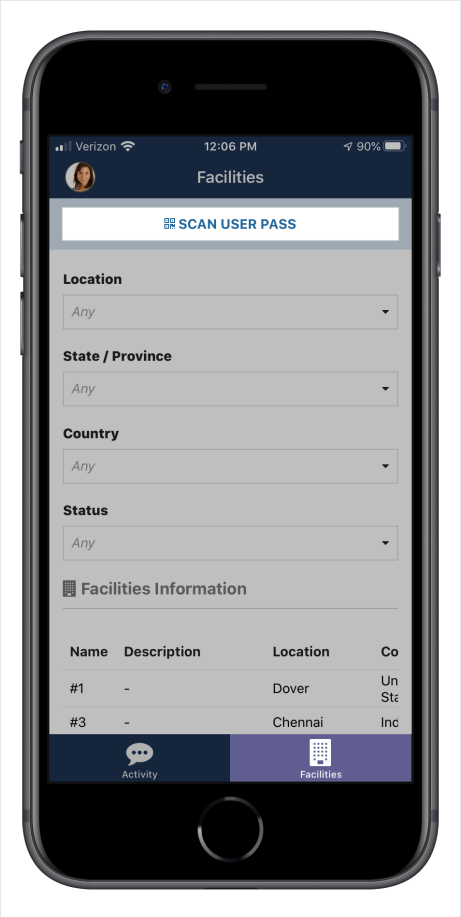
Screeners and response managers can scan mobile passes using the Appian mobile application.

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.

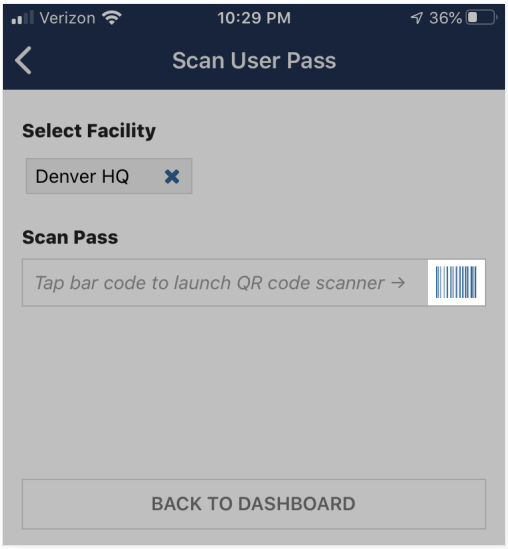



To scan a pass:

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 **Configure** tab and click **FACILITIES**.
3. Click **SCAN USER PASS**.




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




6. Scan the pass using the mobile device's camera. Either **VALID PASS** or **INVALID PASS** displays.
7. 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.

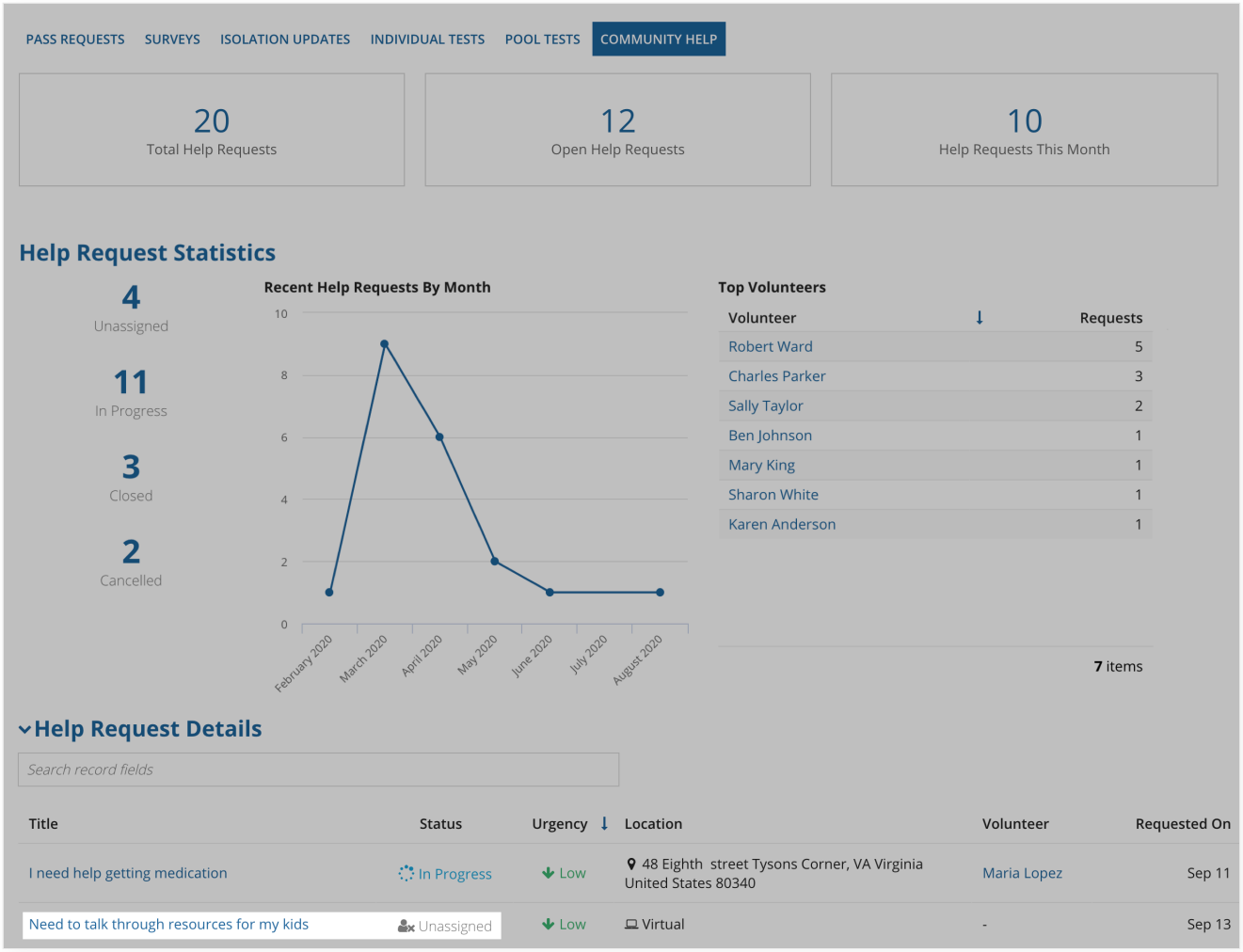
Valid passes can be scanned multiple times and will be valid until they have expired or been revoked due to a disqualifying response on a questionnaire.

## Matching help requests with volunteers

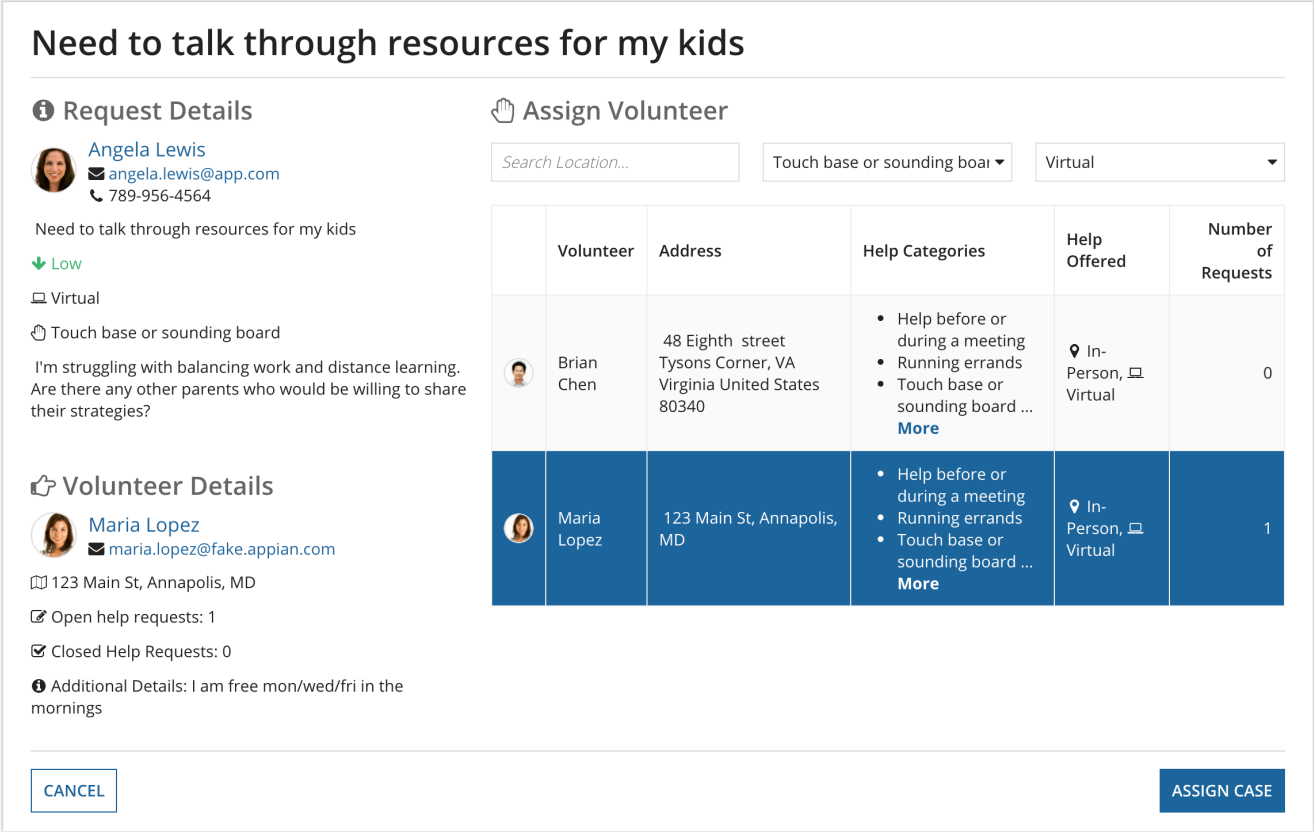
If the Community Volunteering and Help Requests feature option is toggled on, response managers and coordinators can match help requests with volunteers.

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.



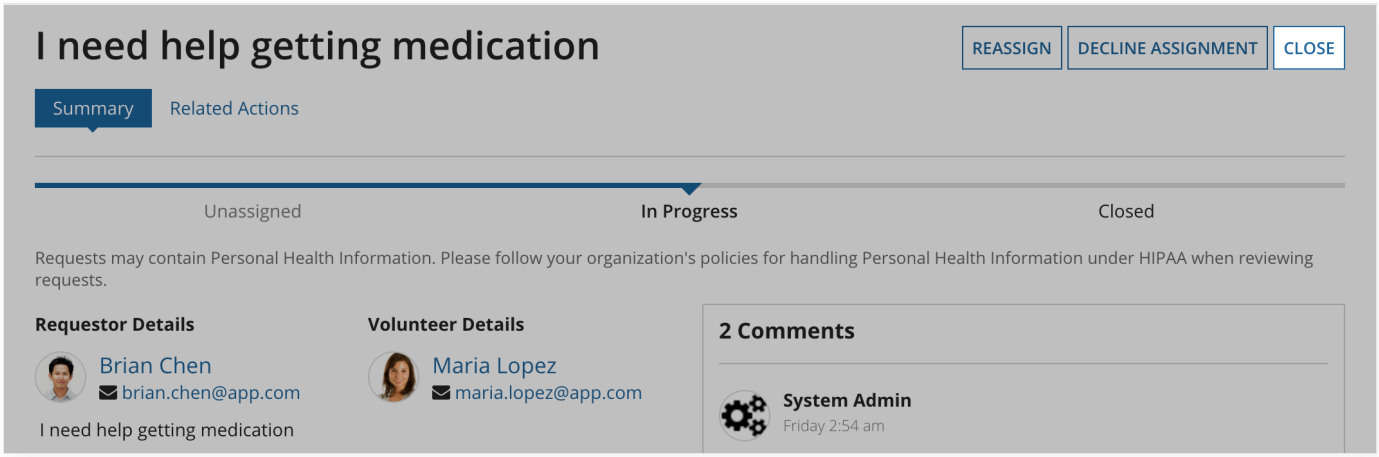

3. Click **MATCH WITH VOLUNTEER**.
4. Select a volunteer from the list and click **ASSIGN CASE**.




> 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.

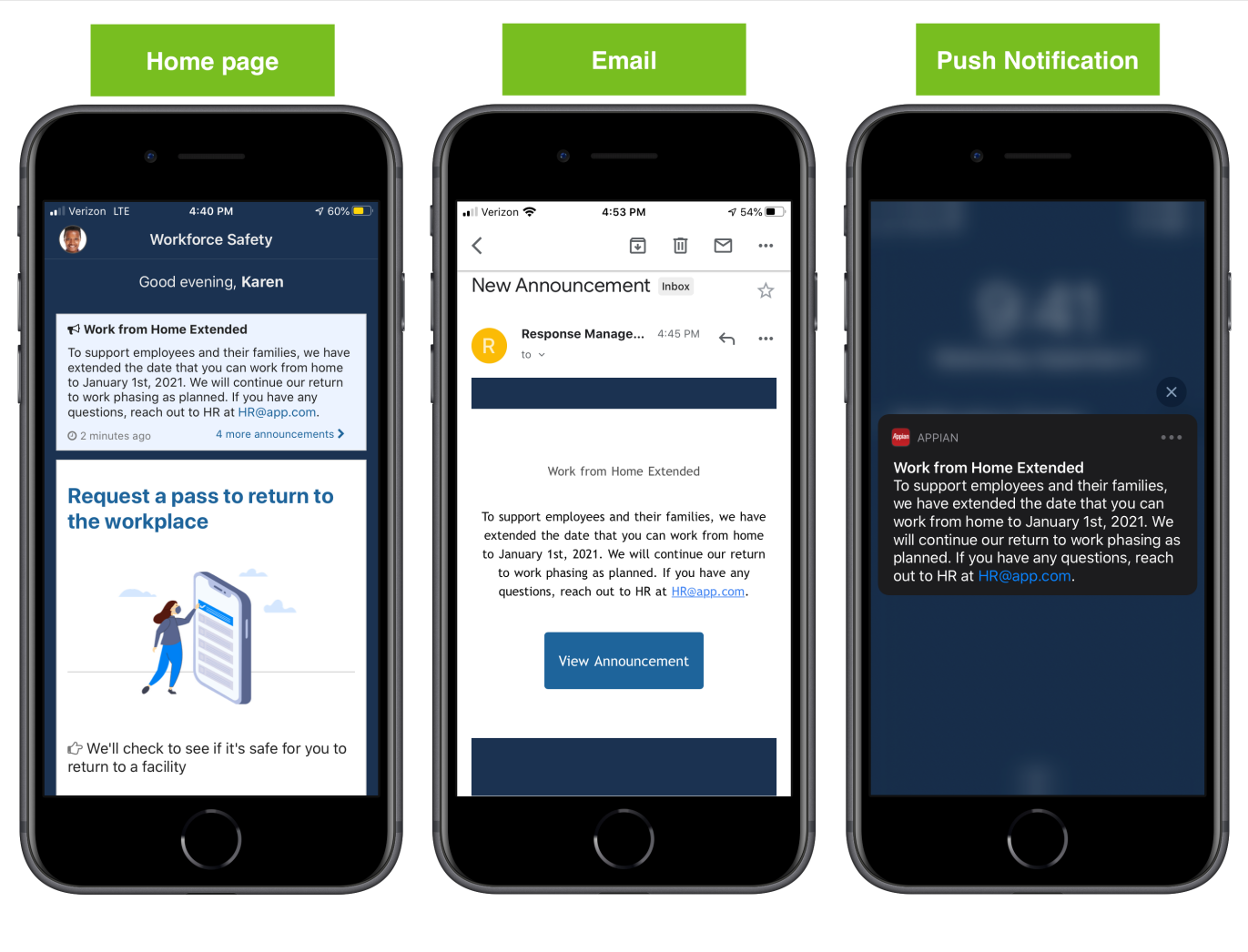
You can also match an assigned help request to a different volunteer by opening the help request and clicking **REASSIGN**.

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




## Managing announcements

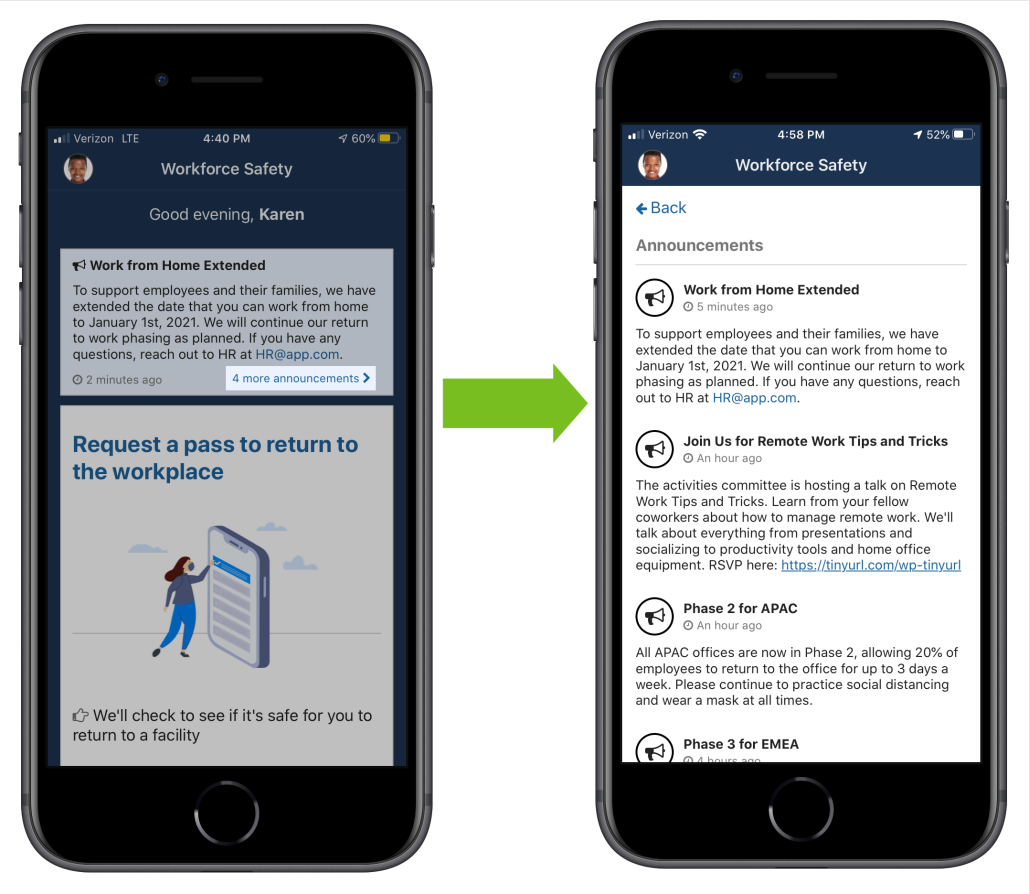
To keep your users up to date with the latest news, response and configuration managers can post announcements on their Workforce Safety homepage. You can also choose to send an email or push notification to mobile devices when you post the announcement.




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.

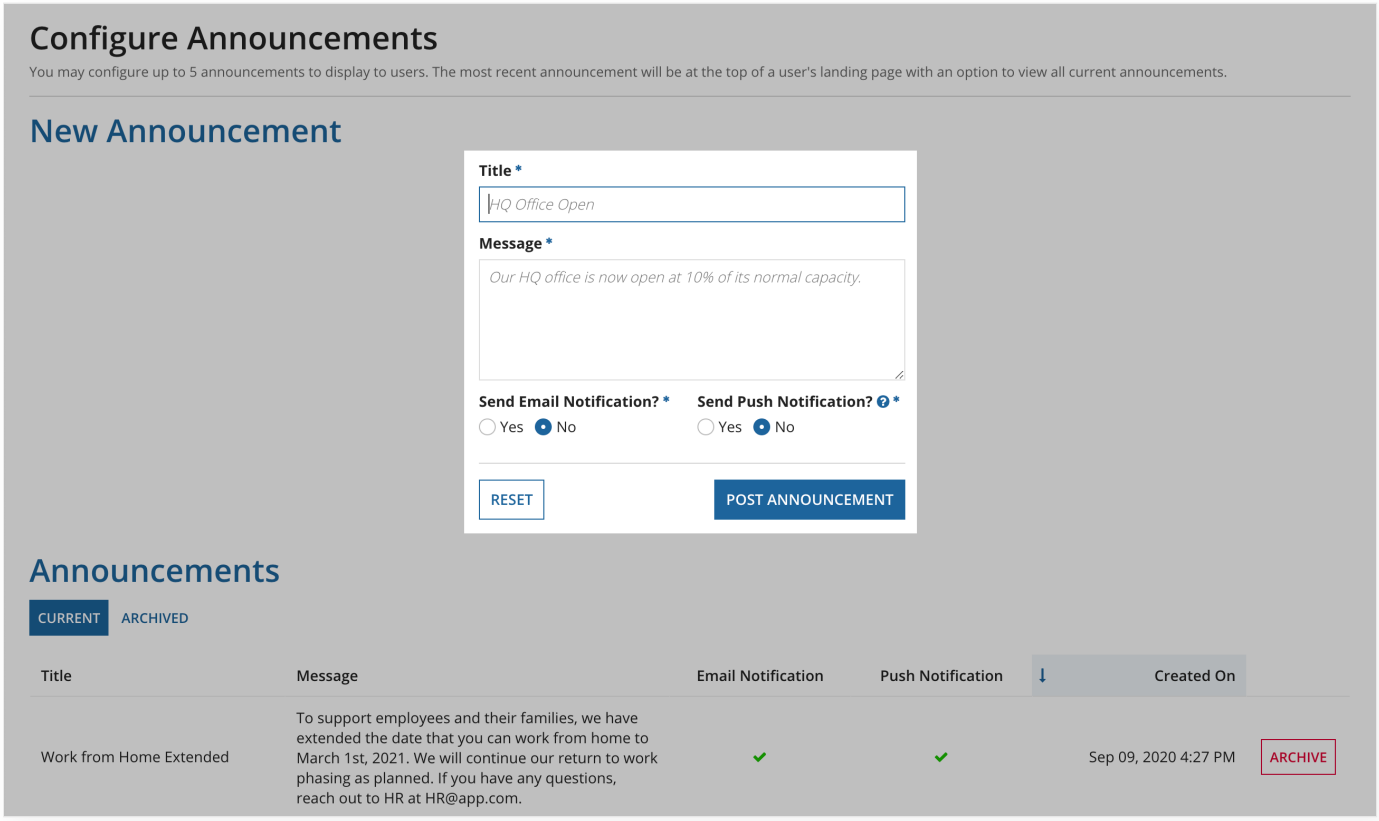



## Posting announcements

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**.



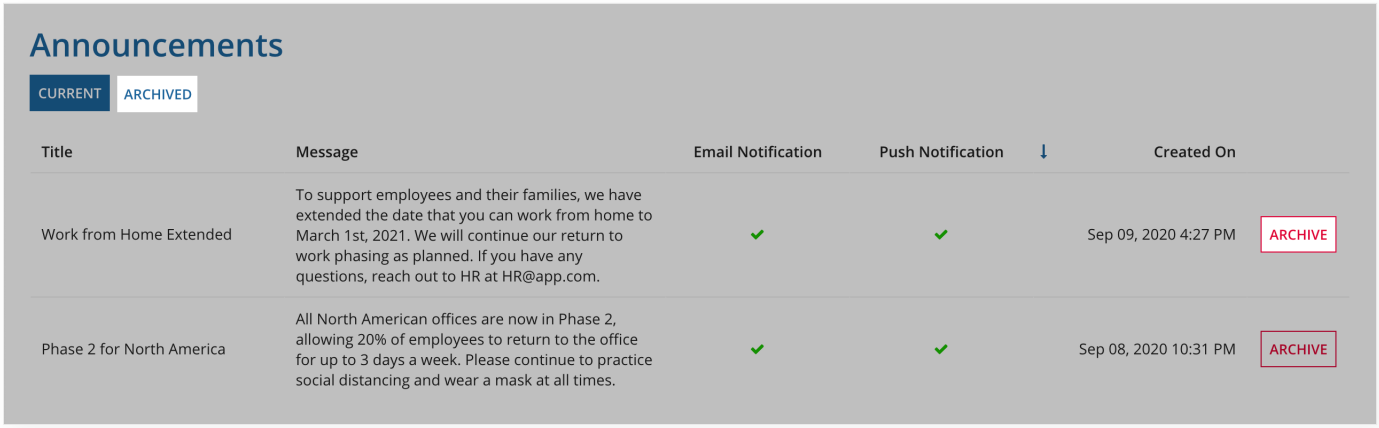

### Archiving announcements

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 isolation incidents

COVID-19 isolation incidents are essential to managing your COVID-19 response. Response managers must be made aware of people diagnosed with or exposed to someone with COVID-19, or people that show symptoms of COVID-19 in order to protect the workplace community.

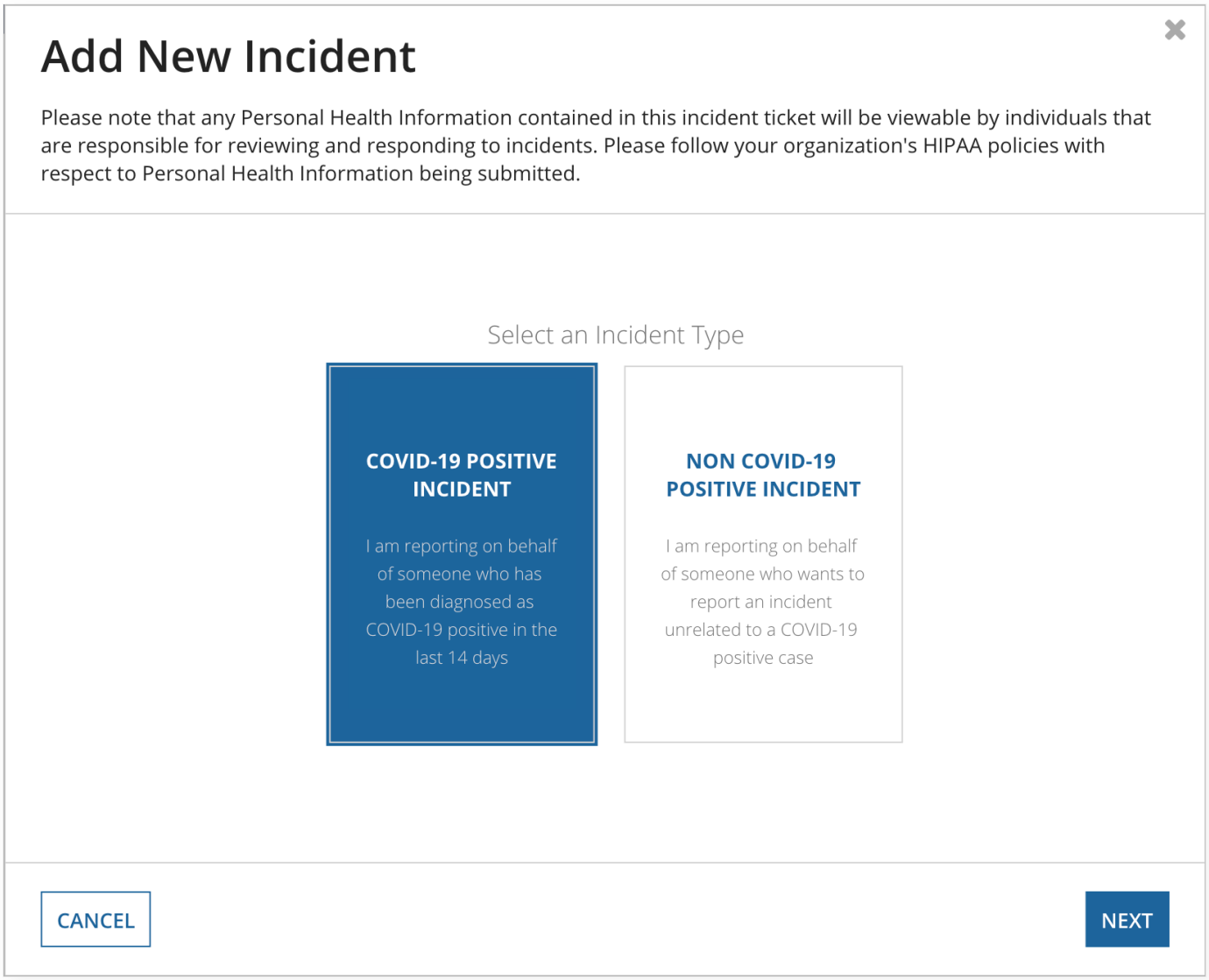
Workforce Safety helps response managers with the enormous task of keeping their communities safe by:

- Automating 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.

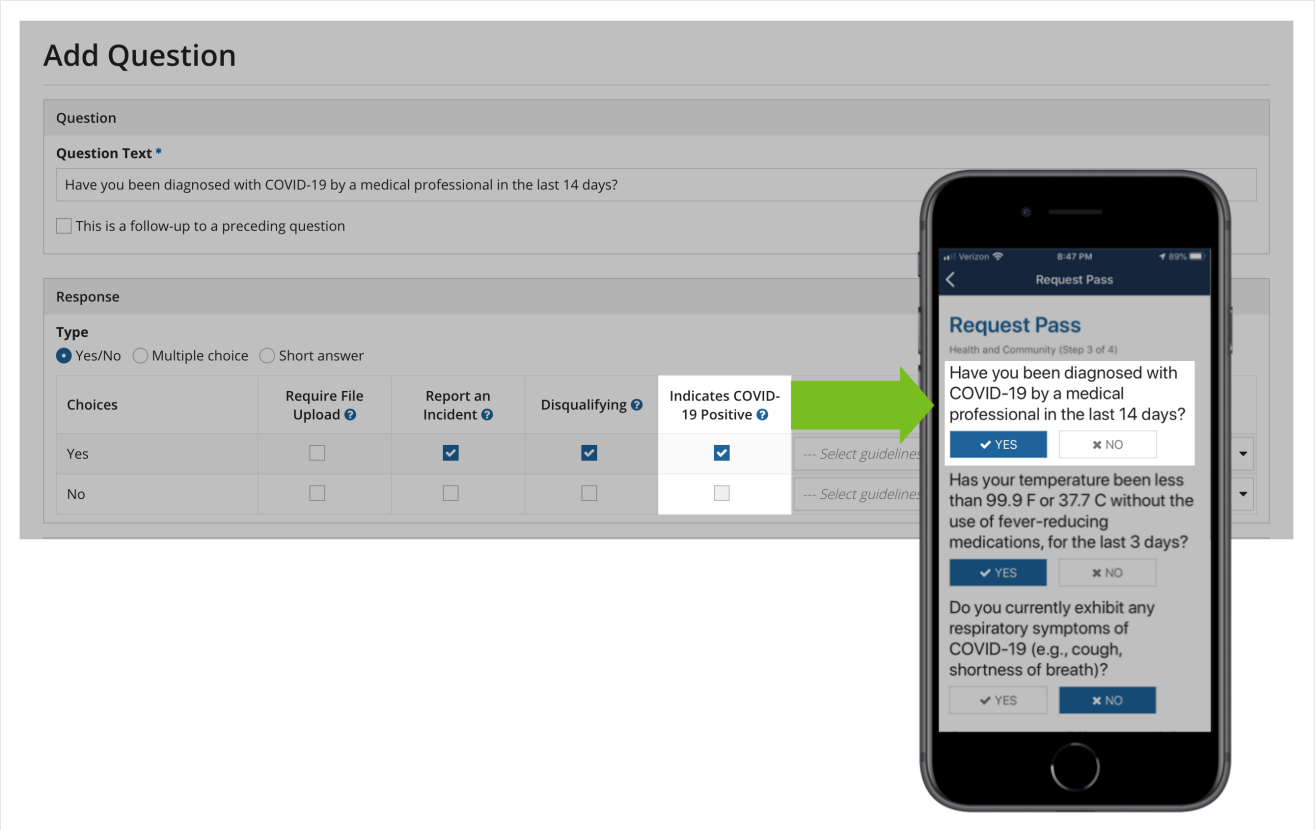
## How COVID-19 isolation incidents are created

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

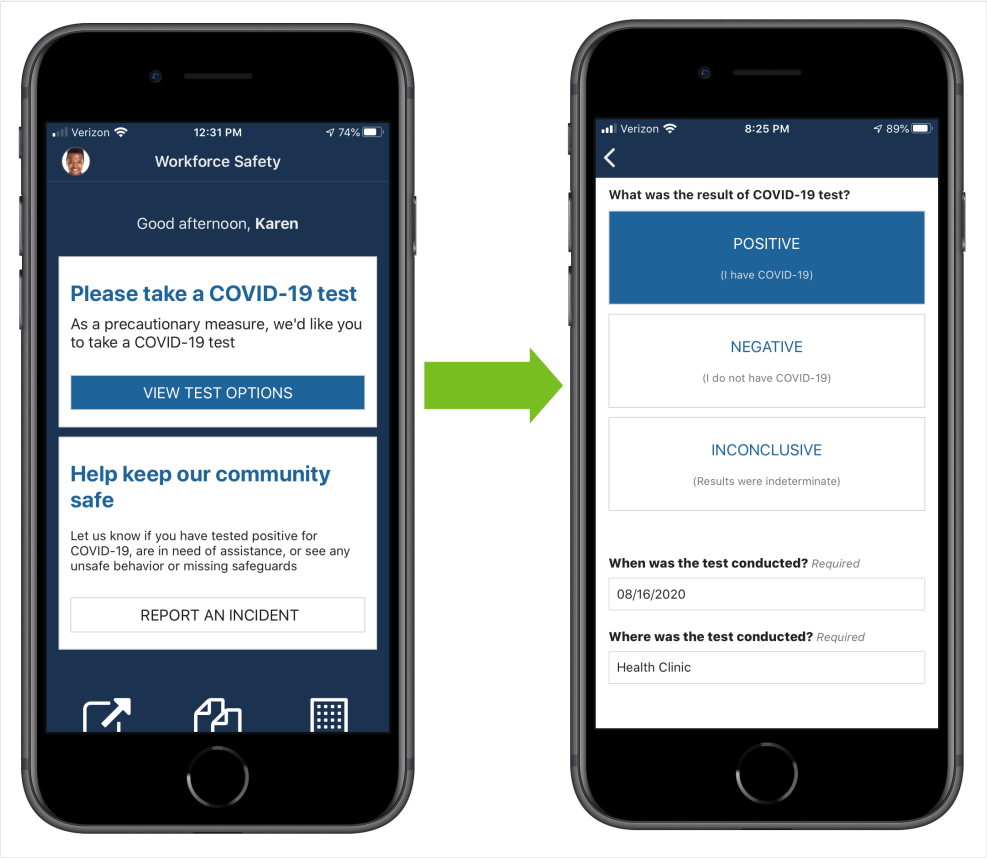



A COVID-19 isolation incident can also be created automatically in the following situations:

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




- By submitting a positive COVID-19 test result.
  - **Note**: If **Require Response Manager Verification of Test Result Evidence?** was selected when the test request was sent, the user won't be placed into isolation until after the test result is verified by a response manager.



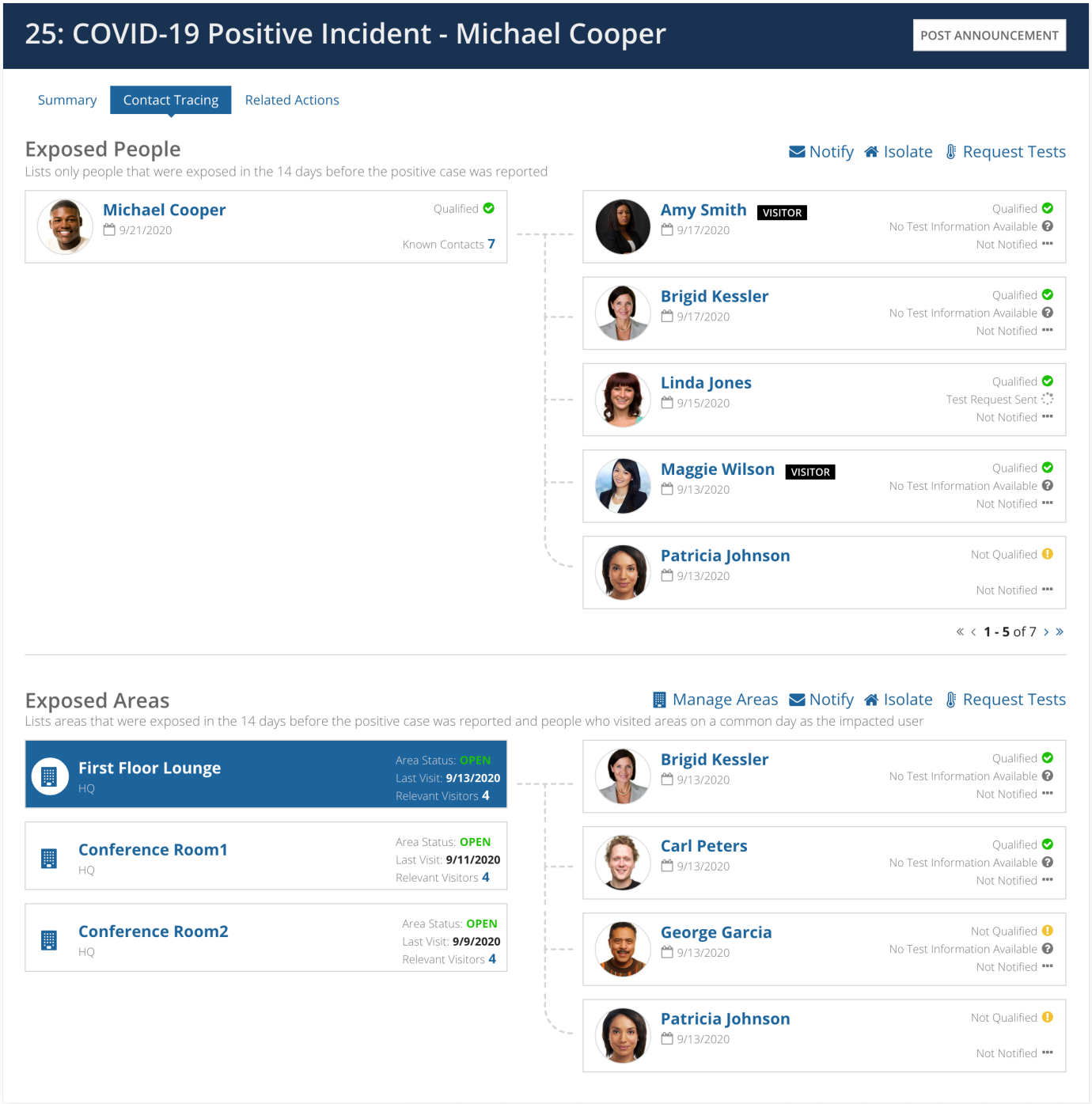

## How COVID-19 isolation incidents affect users

### Contact tracing

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

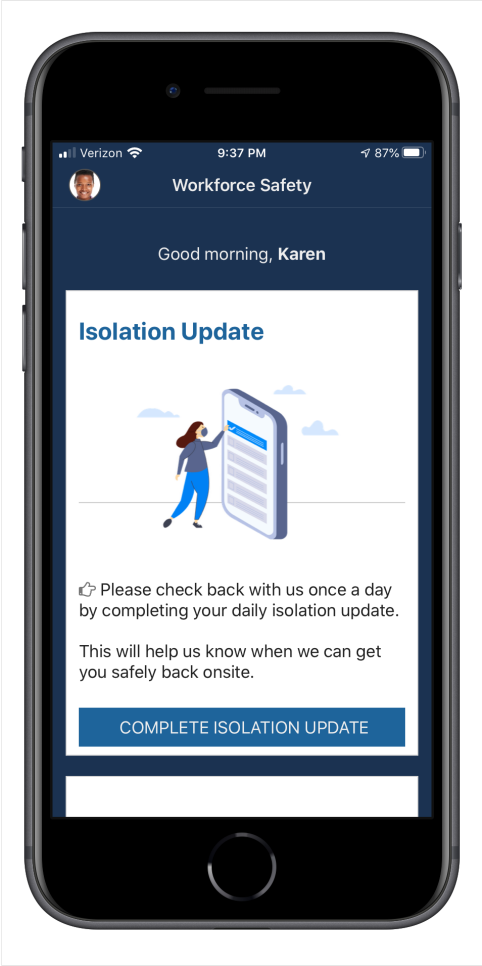
The Contact Tracing tab of the incident displays any individuals the user was reported to have come in contact with during the past 14 days.

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




### Automatic isolation

Whether the COVID-19 isolation incident is created manually or automatically, the affected person will be automatically placed into isolation and any active passes they have will be revoked. This means that they cannot take a survey or request a pass. Instead, they will be asked to complete isolation updates.




### Only one COVID-19 isolation incident at a time

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

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

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

## Responding to COVID-19 isolation incidents

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

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

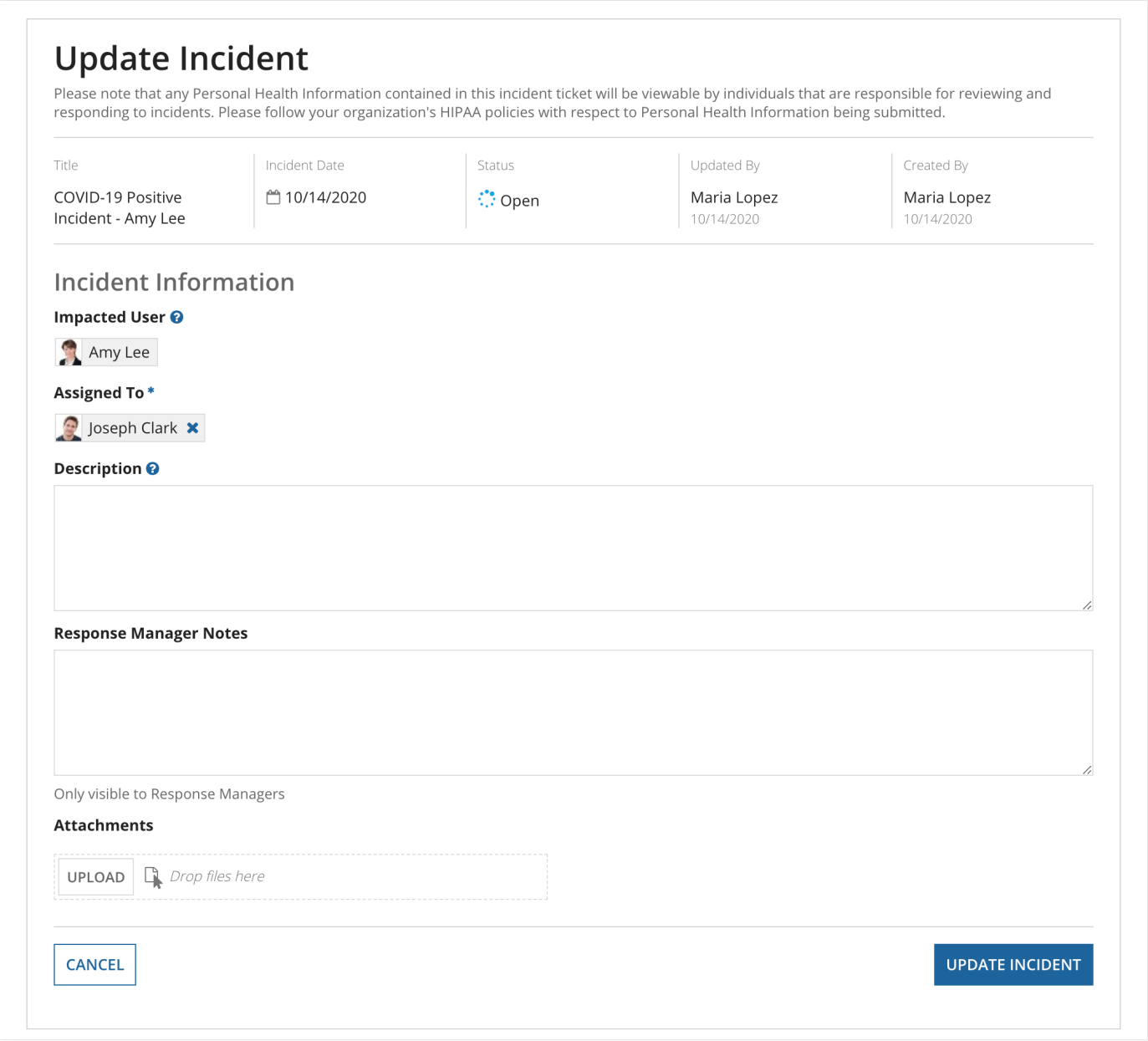
### Managing a COVID-19 isolation incident

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

To manage a COVID-19 isolation incident:

1. 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**.



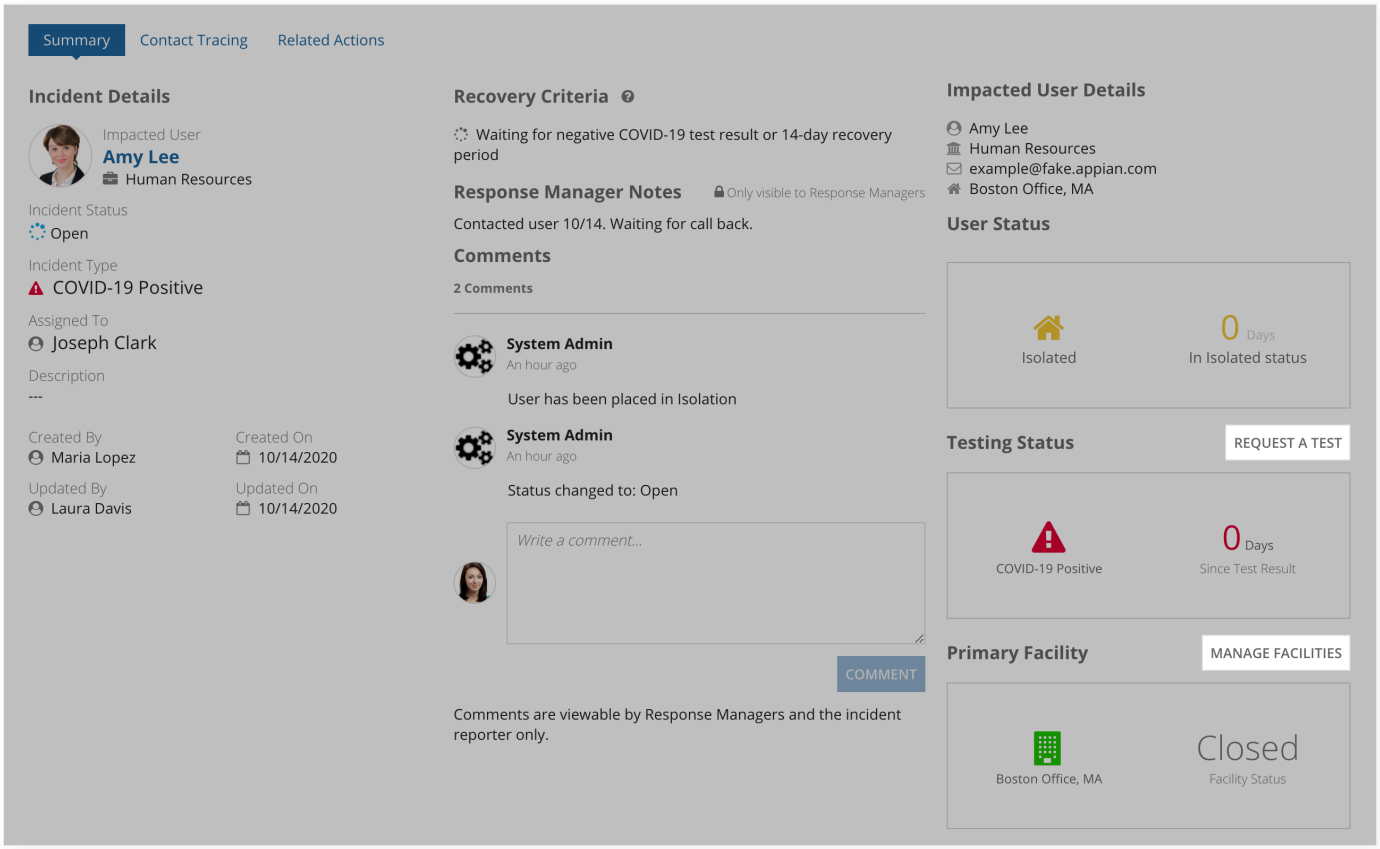

## Managing the impacted user

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

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

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

1. In the COVID-19 isolation incident, go to the **Summary** tab.
2. To manage test requests for the user, click **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

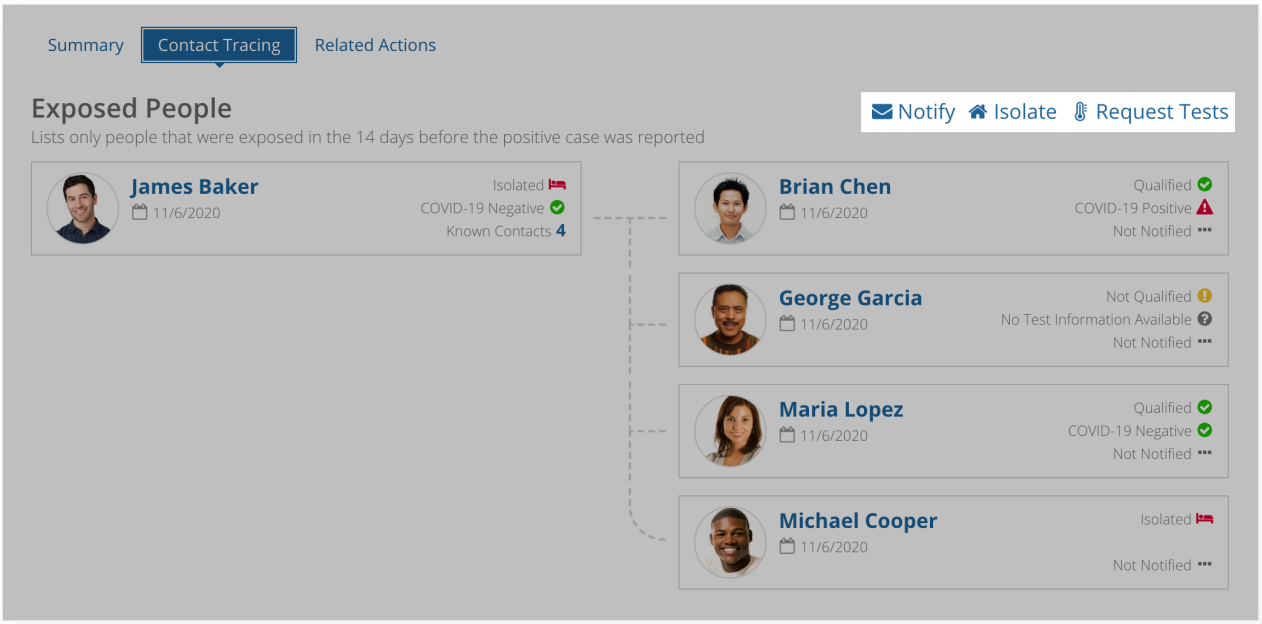
Determining who was exposed to a user before they were diagnosed as positive for COVID-19 is very important to limit the spread of COVID-19. COVID-19 isolation incidents list all of the people that the user reported having contact with, along with all of the people who reported having contact with the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

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 isolation incident via an announcement. You can perform all of these actions from the Contact Tracing tab in the COVID-19 incident.

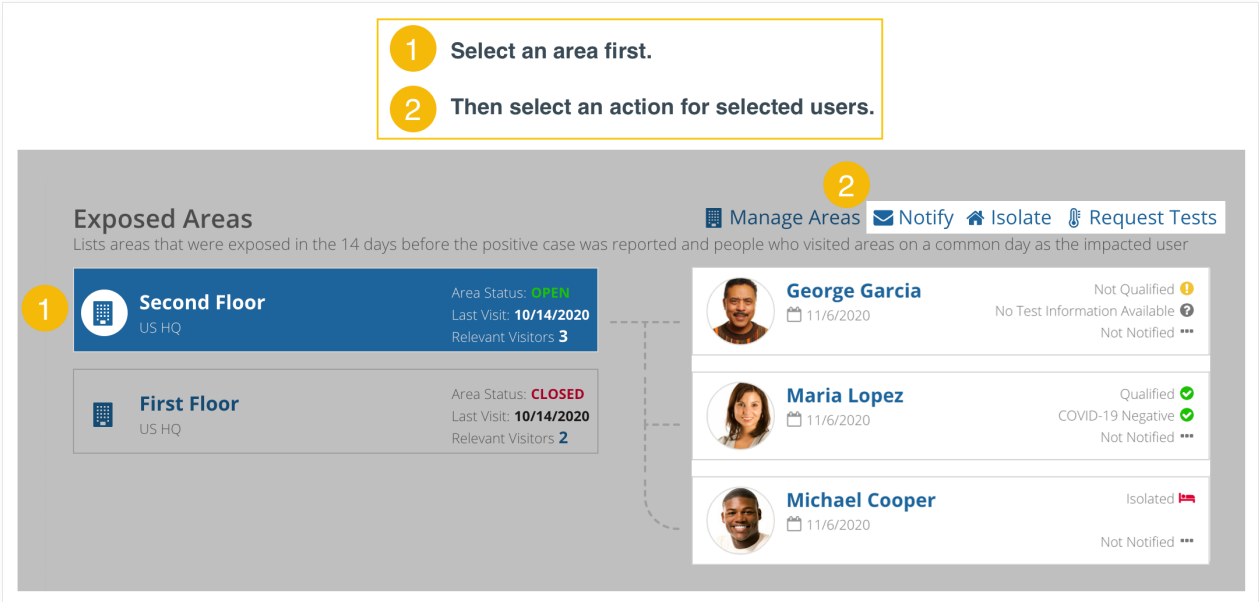
> Never send any personally identifying information of any affected individuals when notifying exposed people.

To perform contact tracing for exposed people and areas:

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




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




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

### Updating contacts

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

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

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

1. From the **INCIDENTS** page, find and open the incident.
2. Select the **Contact Tracing** tab and click **UPDATE CONTACTS**.
3. Click **ADD PEOPLE** and enter the following information in the **Exposed People** section:
    - **Most Recent Contact Date**
    - **Exposed People**
    - **Exposure Description**
4. Click **ADD**.

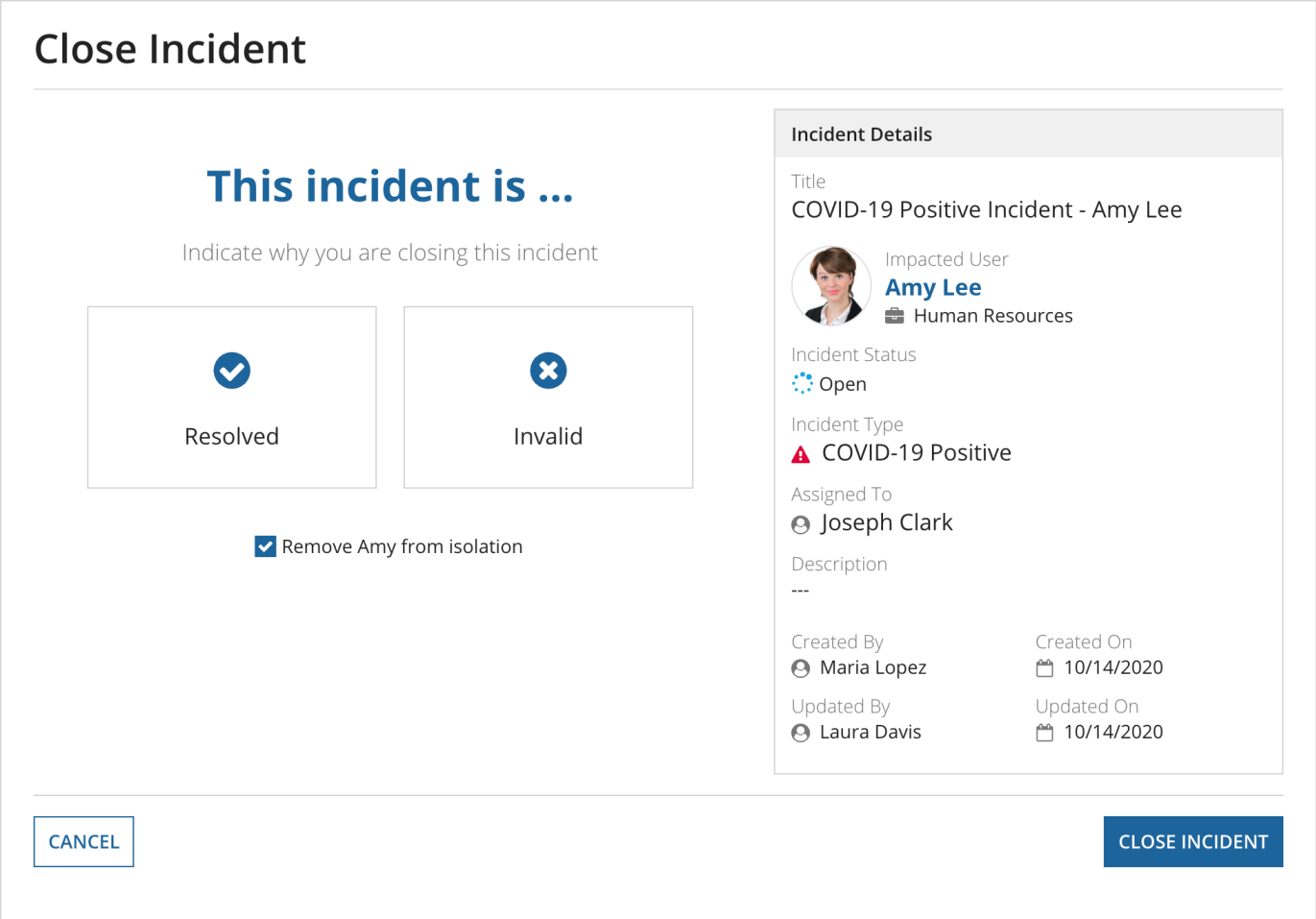
5. In the left pane, select **Exposed Areas**.
6. Click **ADD AREAS** and enter the following information in the **Exposed Areas** section:
    - **Most Recent Contact Date**
    - **Exposed Areas**
    - **Exposure Description**
7. Click **ADD**.
8. Click **UPDATE**.

### Close the incident

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

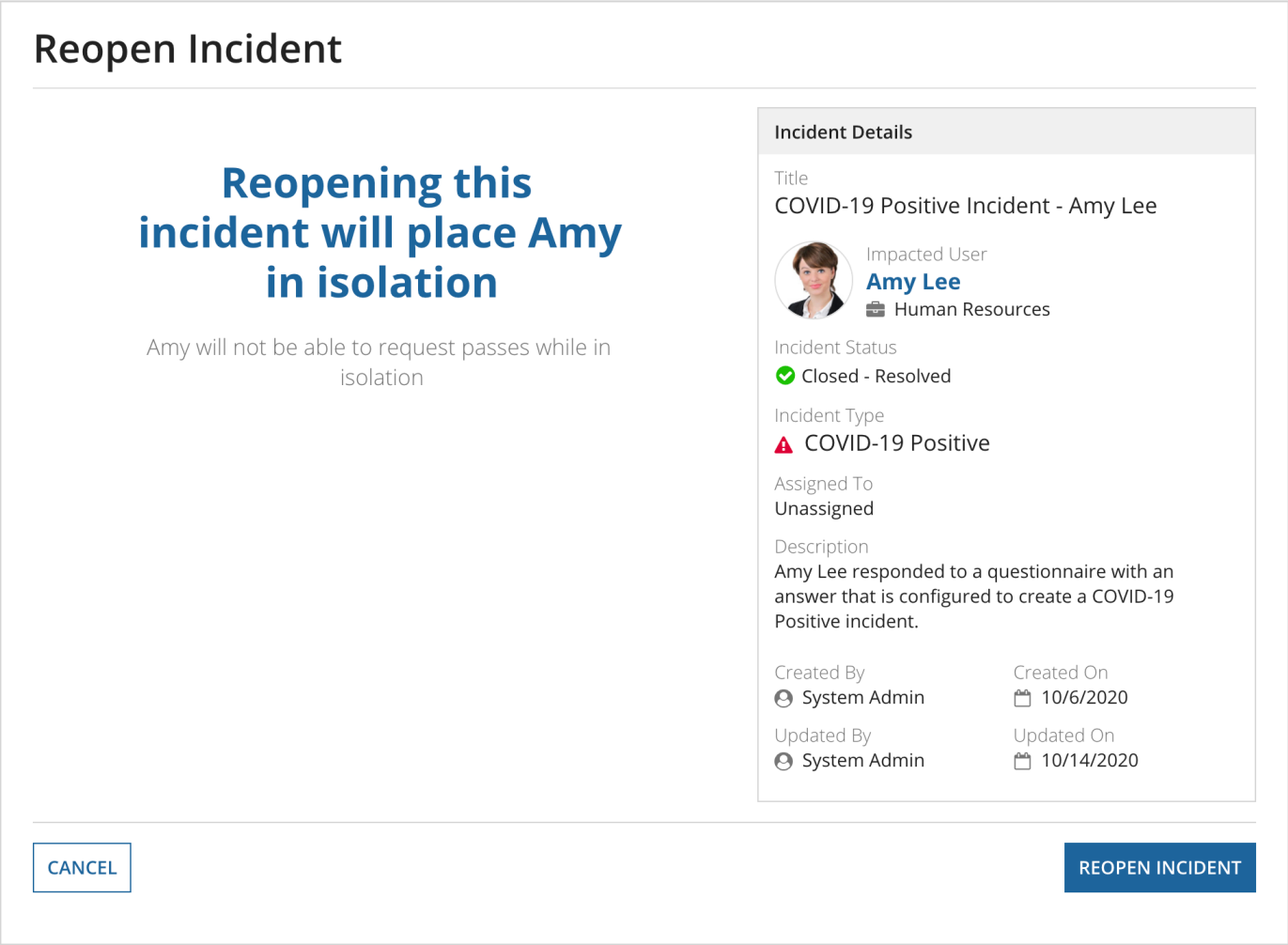
To close an incident manually:

1. In the COVID-19 isolation incident, click **Close Incident**.
2. Choose whether you are closing the incident because it is **Resolved** or it was an **Invalid** incident.
3. Choose whether to remove the impacted user from isolation by selecting or deselecting the **Remove [User] from isolation** checkbox. Click **CLOSE INCIDENT**.




### Reopening closed incidents

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



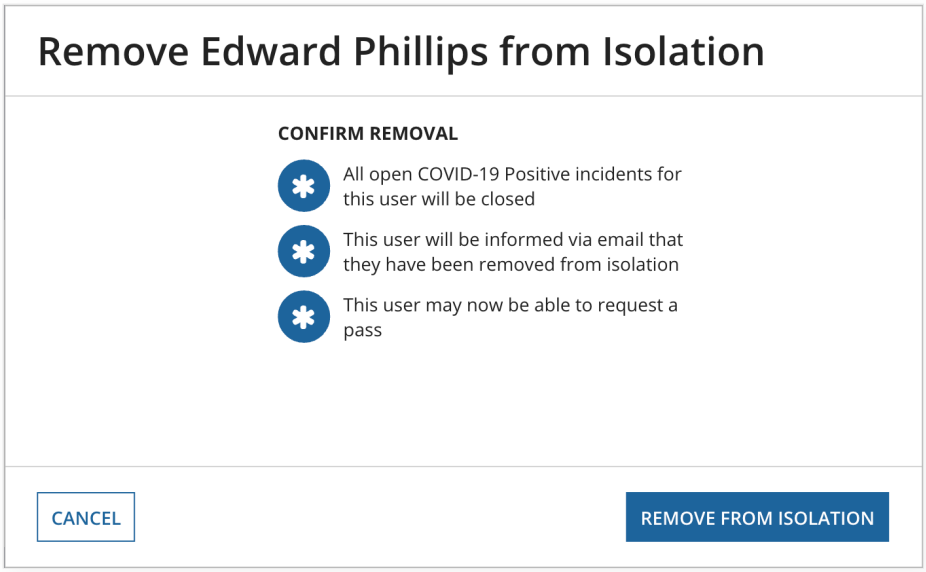

## Removing a user from isolation manually

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 isolation incident, the incident will be automatically closed.

To manually remove a user from isolation:

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




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

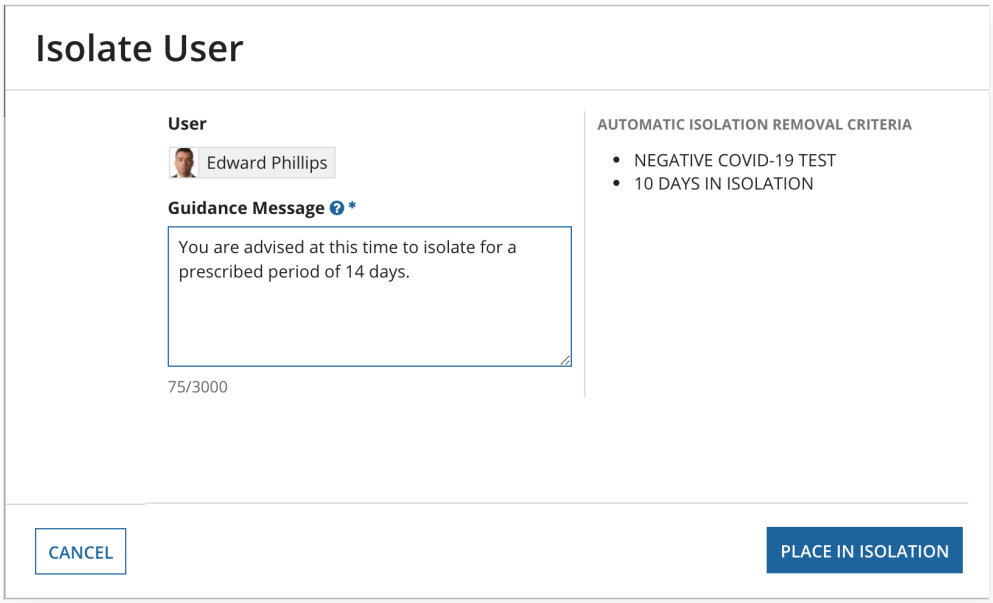
## Isolating a user manually

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

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

To manually put a user into isolation:

1. From anywhere in the Response Hub, click the user's name and go to the **Summary** tab.
2. Click **ISOLATE USER**.
3. Enter a **Guidance Message** that you would like to email to the user.
    - **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**.



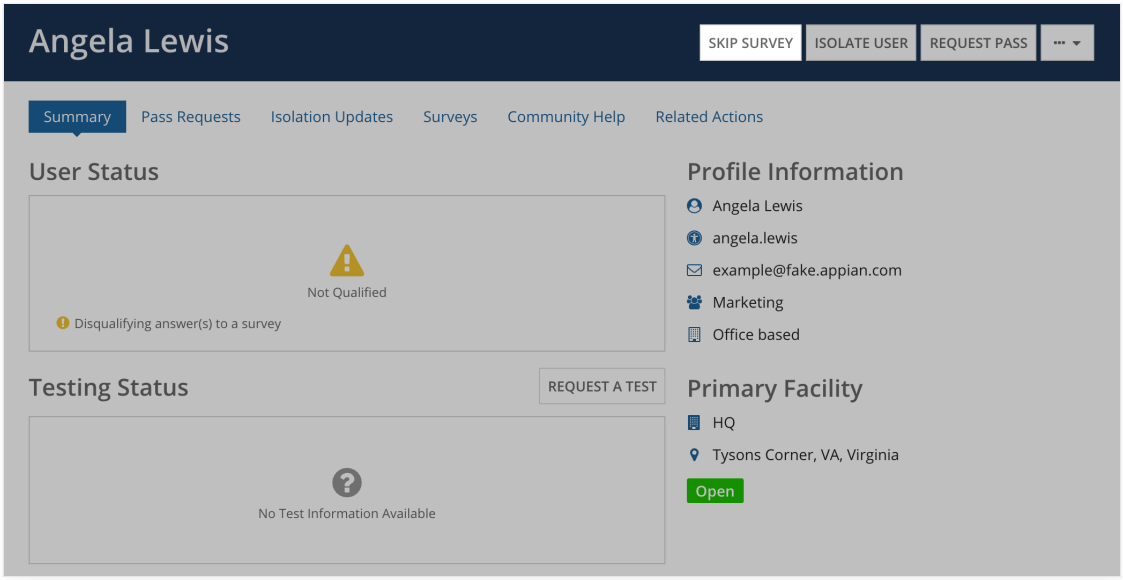

## Skip survey for a user

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.

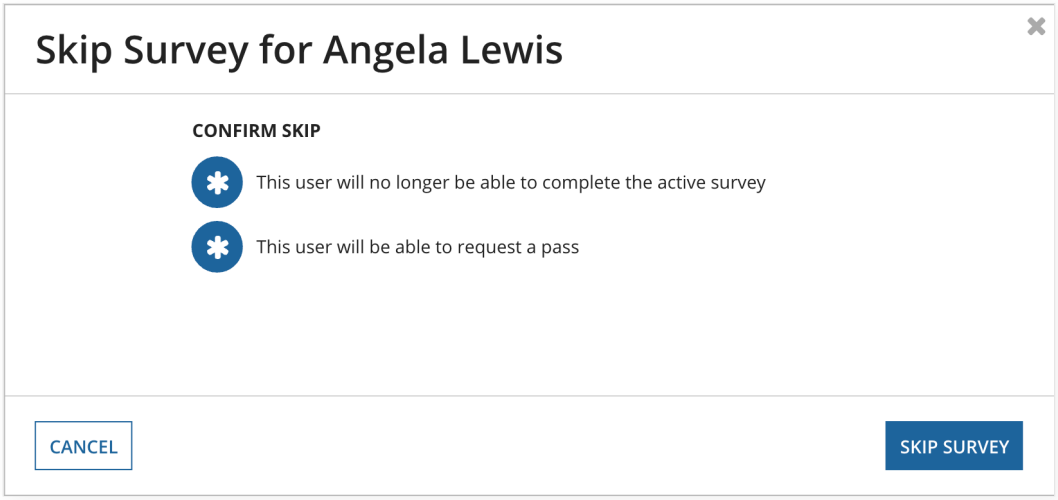
If you skip the survey for a user, they will no longer be able to complete the currently active survey.

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

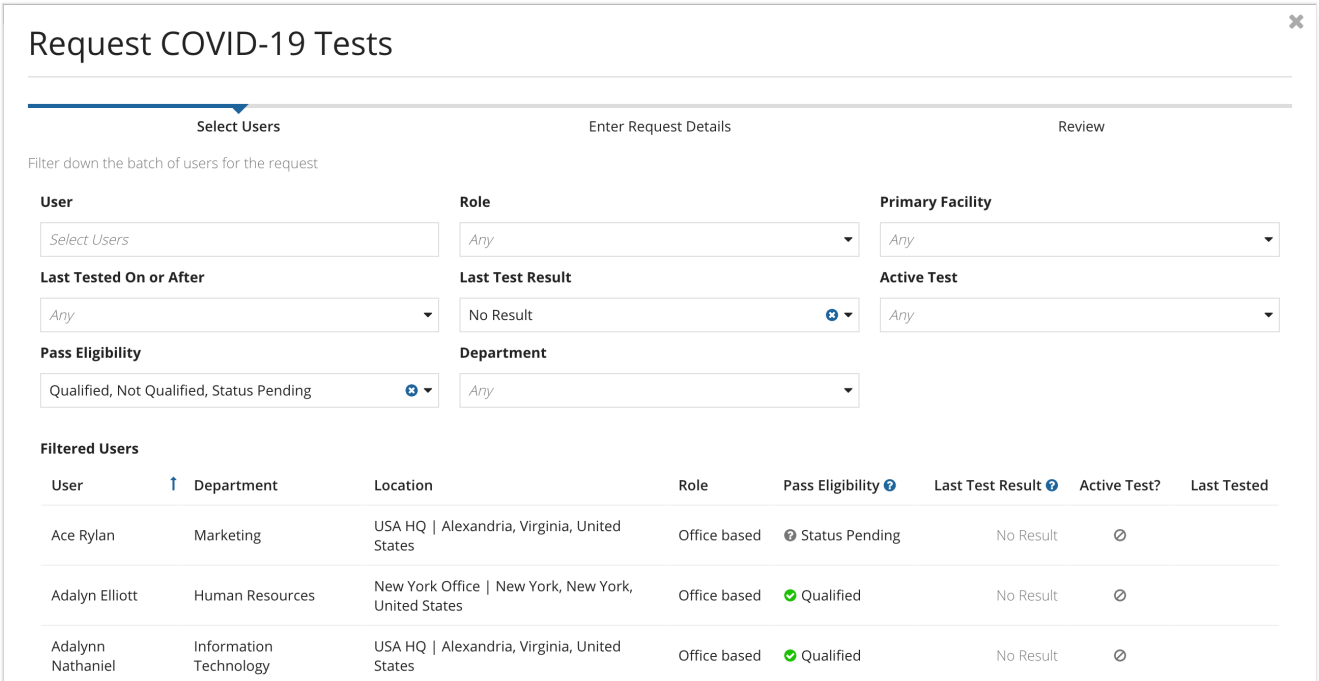
Response managers can request that users take COVID-19 tests either from the user's profile, the People page, or the Contact Tracing tab of a COVID-19 isolation incident. On the people page they can request test results from individuals or groups, including the ability to select a random sample from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

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

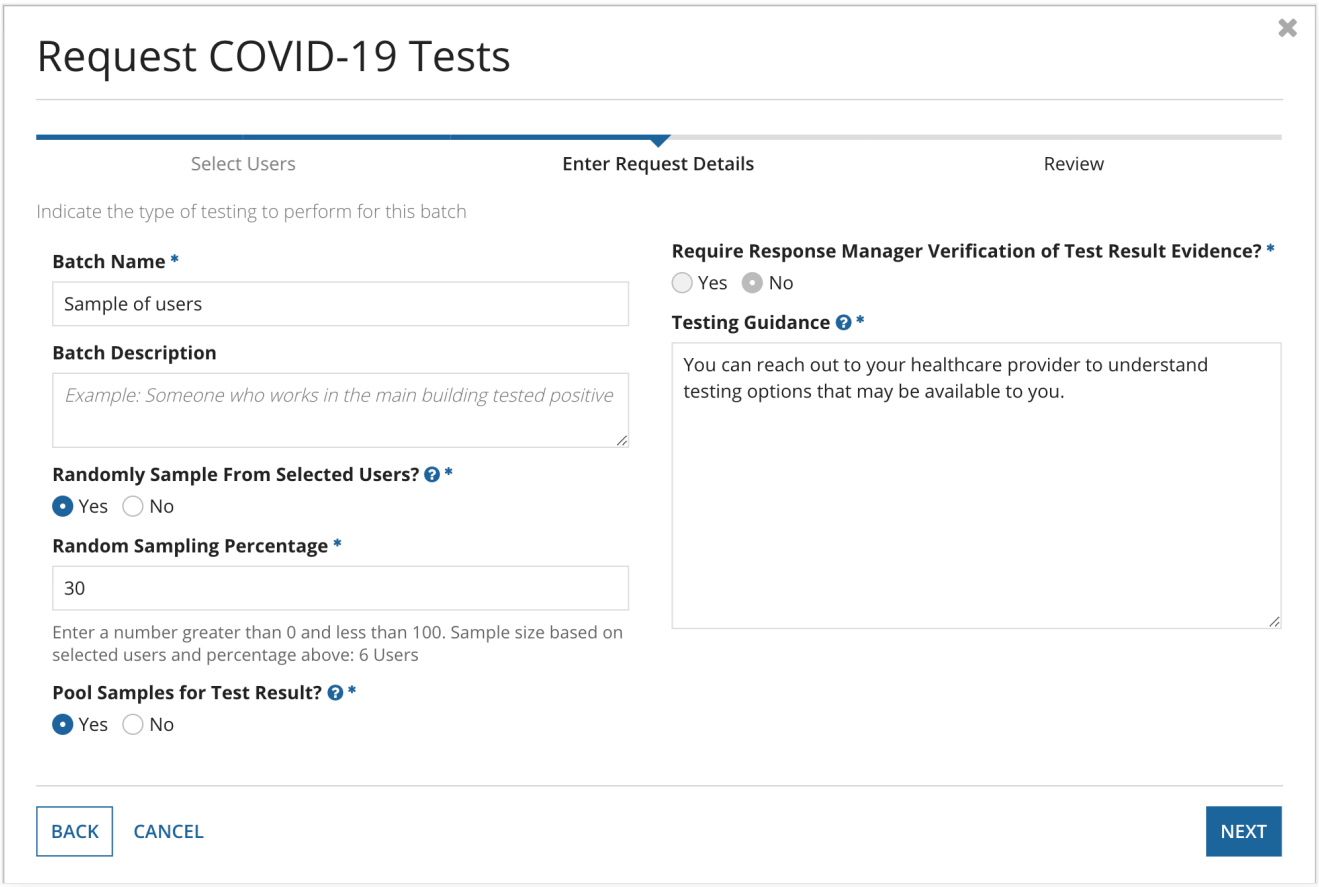
Response managers can determine their own process for testing and can notify individuals of that process when they request a test.

To request COVID-19 tests from the People page:

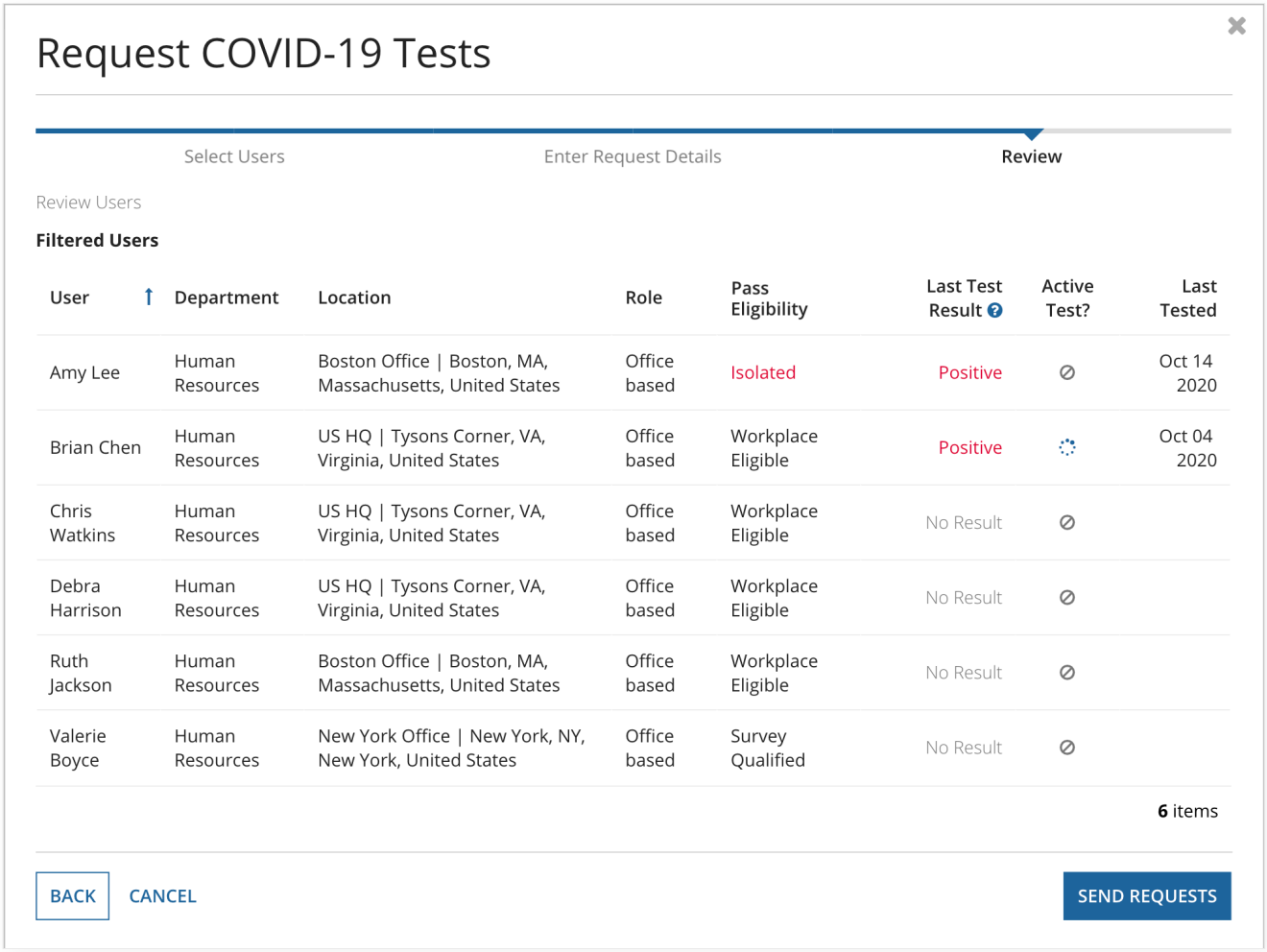
1. Go to the **PEOPLE** page.
2. Click **REQUEST TESTS**.
3. Filter the list to select the user or users that you would like to test and click **NEXT**.




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**.



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




After test result requests are sent, users can acknowledge and submit their test results.

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

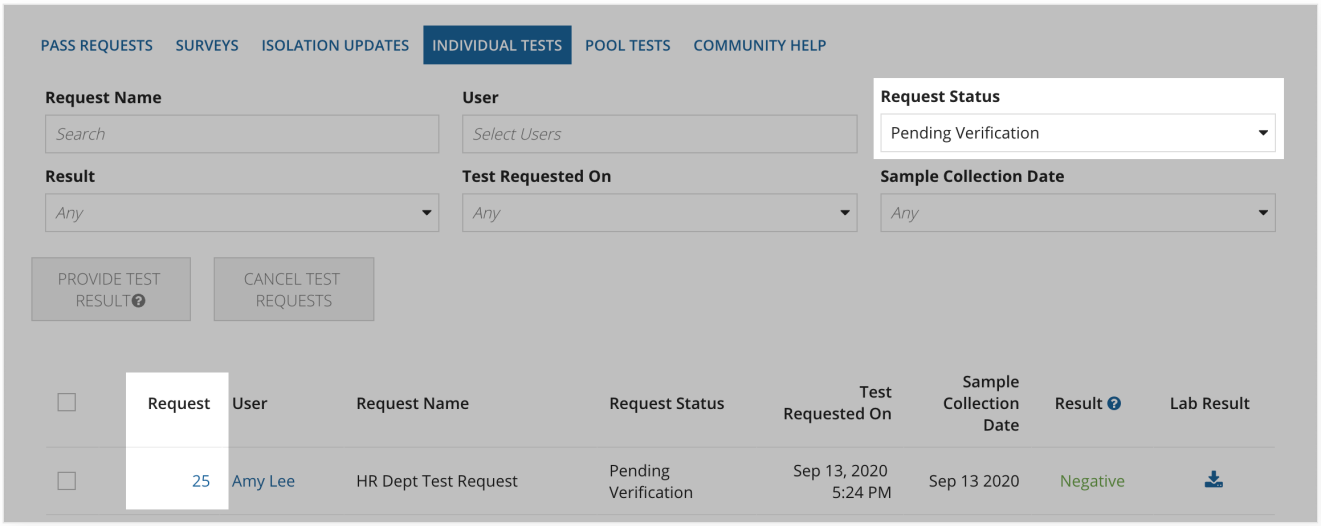
Response managers can also provide test results on behalf of users. For pooled testing, response managers must always provide the test results.

## Verifying test results

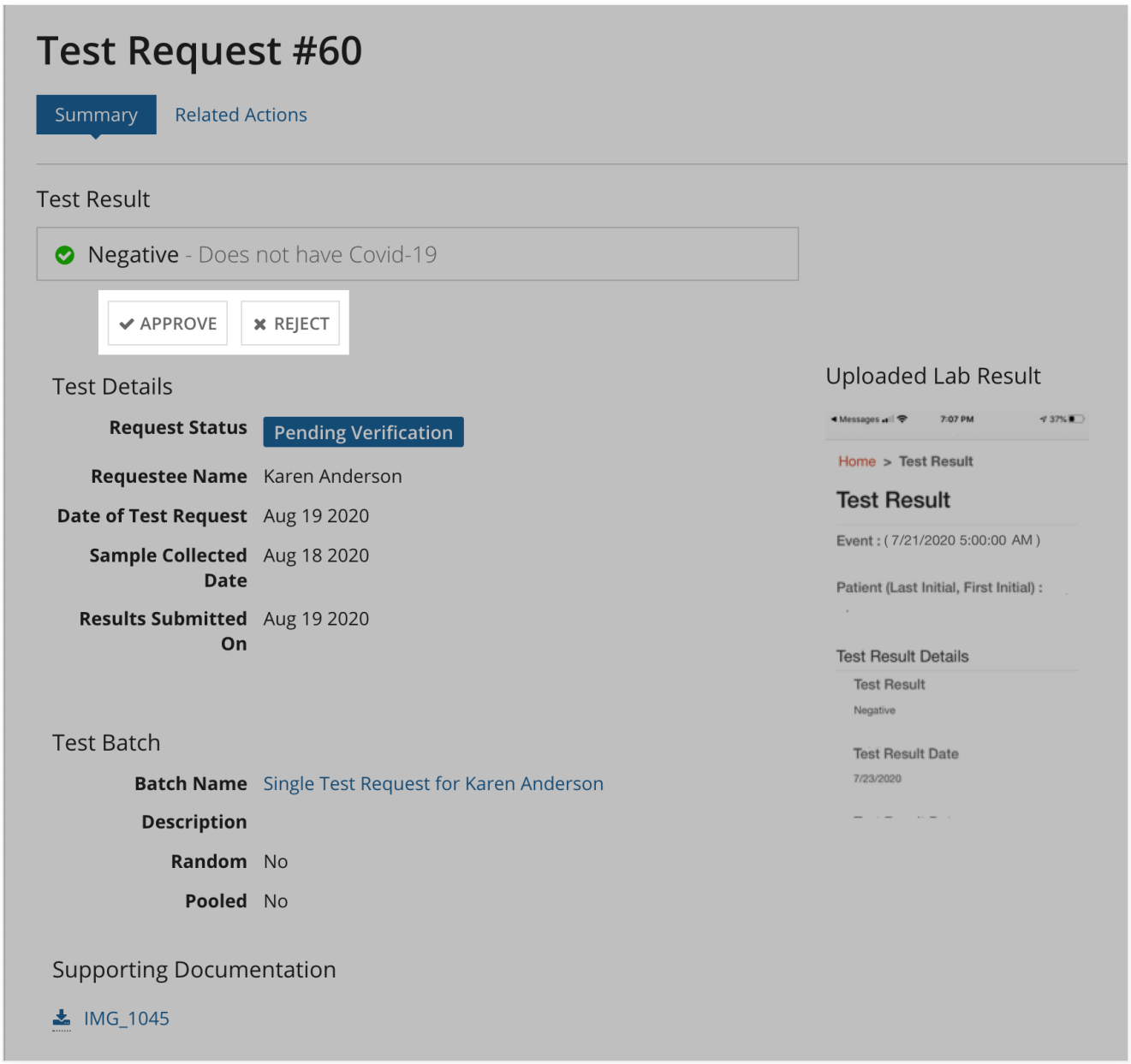
For any COVID-19 test request that has **Yes** selected for **Require Response Manager Verification of Test Result Evidence?**, response managers will have to approve the result in order for the test result request to be completed. If they reject the test result, the user will be sent an email with the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

To verify a test result:

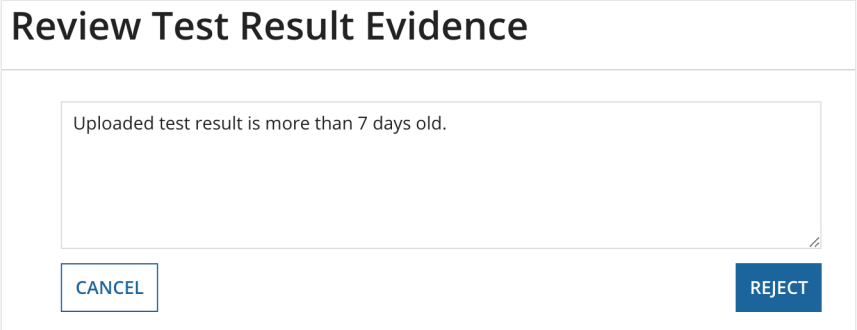
1. On the **ACTIVITY** page, go to the **INDIVIDUAL TESTS** tab.
2. To filter the results to only the ones that require verification, for the **Request Status** filter, select **Pending Verification**.
3. Click the **Request** number for the request that you would like to verify.



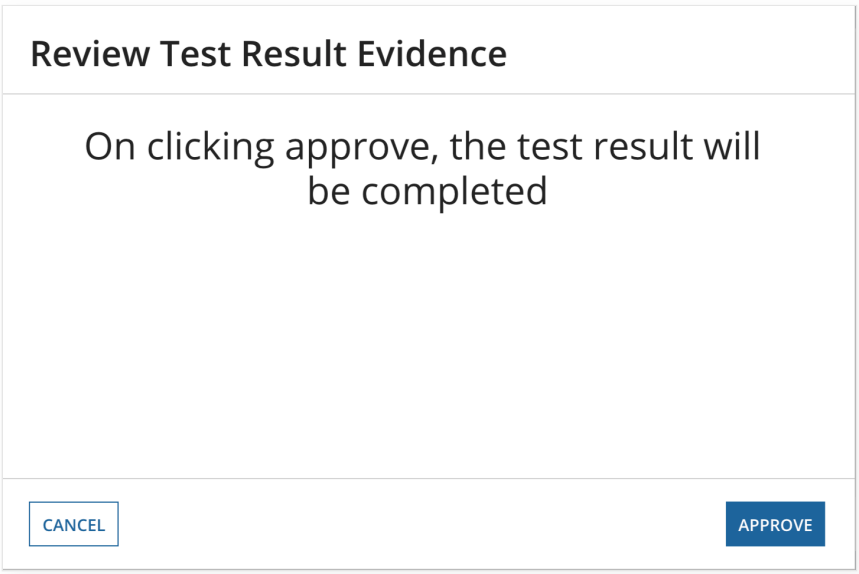

4. Click **APPROVE** or **REJECT**.




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**.

What was the result of COVID-19 test?

POSITIVE (I have COVID-19) | NEGATIVE (I do not have COVID-19) | INCONCLUSIVE (Results were indeterminate)

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

Where was the test conducted? *
Onsite clinic

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

Supporting documents
UPLOAD Drop files here

CANCEL 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**.

PROVIDE TEST RESULT | CANCEL TEST REQUESTS

| | Request | Pool Name | Pool Status |
|---|---|---|---|
| ☑ | 21 | Pooled testing for IT | Pending Result |

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

What was the result of COVID-19 test?

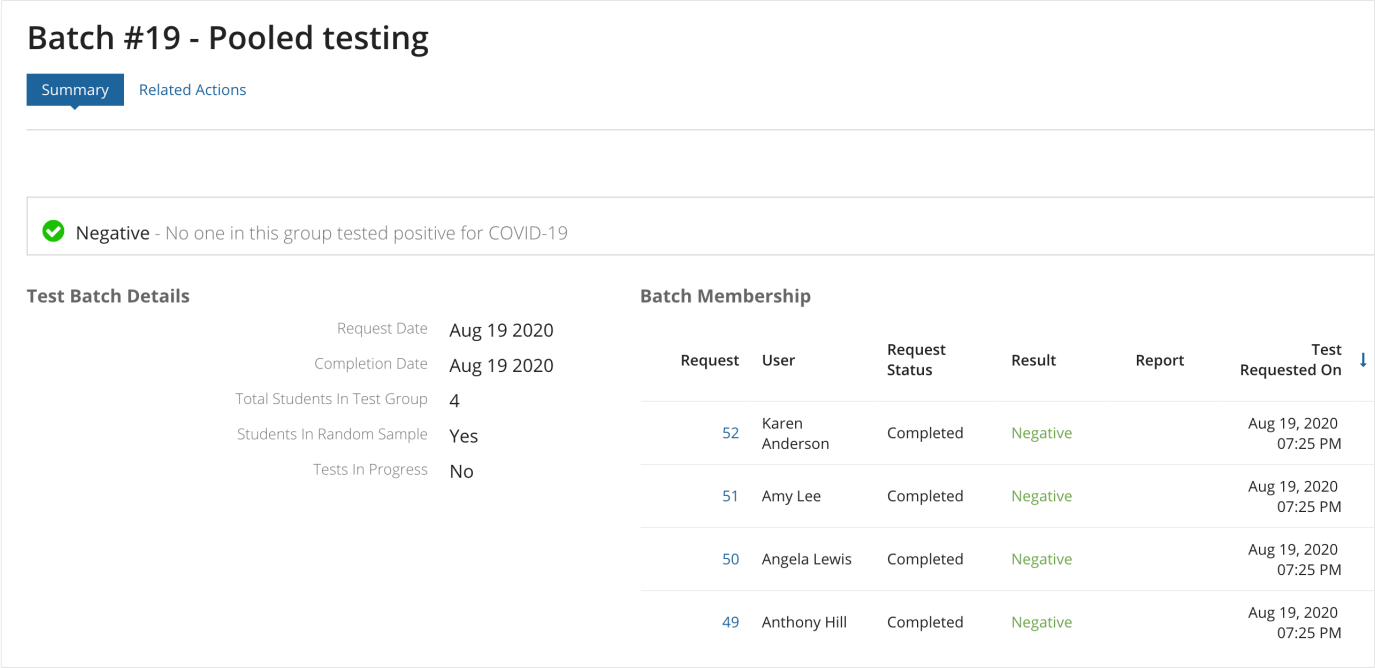
POSITIVE | NEGATIVE | INCONCLUSIVE

Upload the test result
UPLOAD Drop file here

Supporting documents
UPLOAD Drop files here

CANCEL 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.

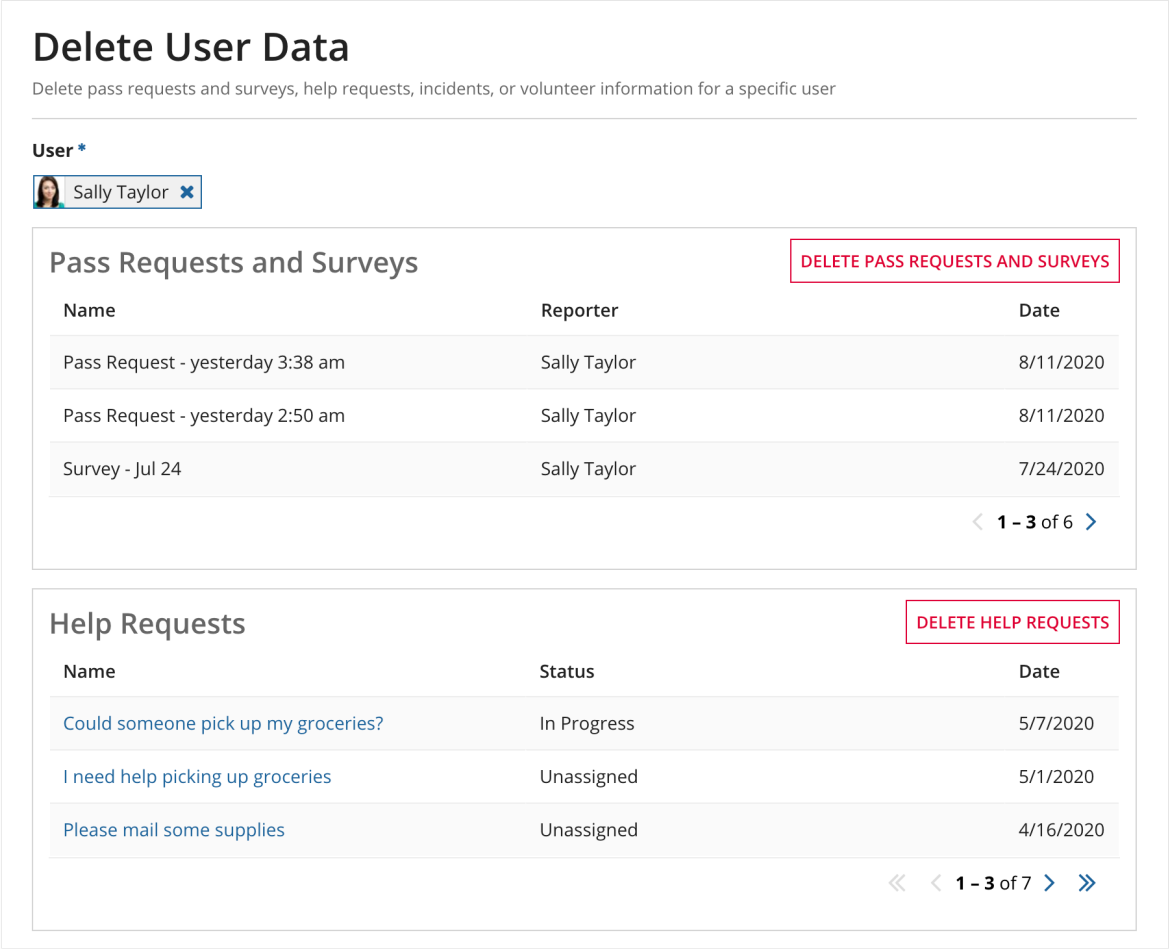
Deleting data affects assignments for existing incidents and help requests. For example, if a volunteer is assigned to a help request and their data is deleted, the help request will become unassigned.

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

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

To delete user data:

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




# Managing Visitors

## Introduction

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

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

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

### See also

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

## Visitor workflows

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

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

### Remote registration process

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

To register remotely:

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

### On-site registration process

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

To register a visitor after they arrive at the facility:

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

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

## What can response managers do and see for visitors?

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

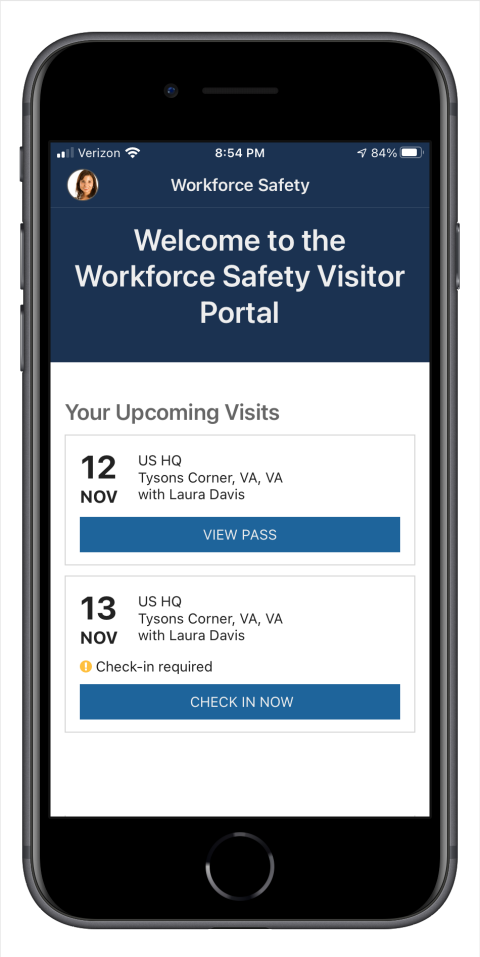
- Isolate them and remove them from isolation.
- Create incidents for them, including COVID-19 isolation incidents.
- Request passes for them.
- Schedule visits for them.
- Delete their user data.

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

## What can visitors do and see in Workforce Safety?

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

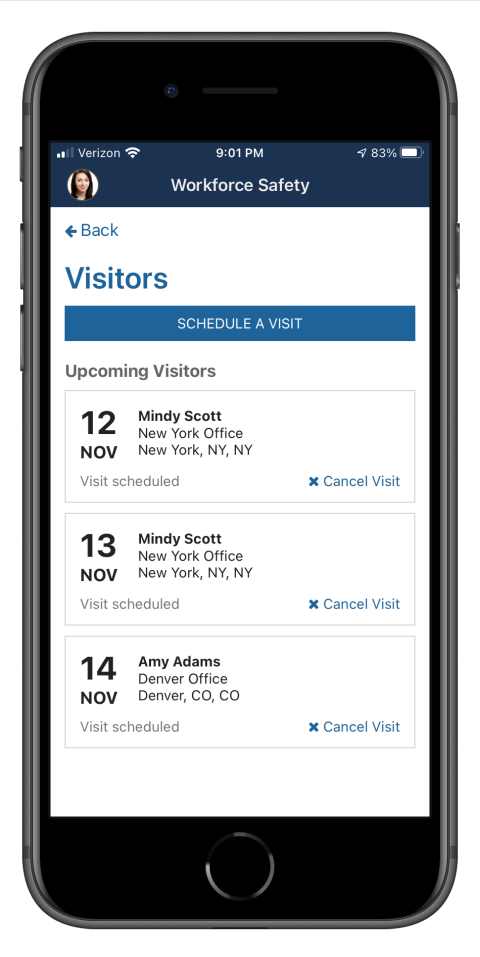
- Request a pass for days they are scheduled to visit.
- View and display their passes.
- View upcoming visits.




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

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

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




To make someone a host, all you have to do is add them to the `Workforce Safety Hosts` group.

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

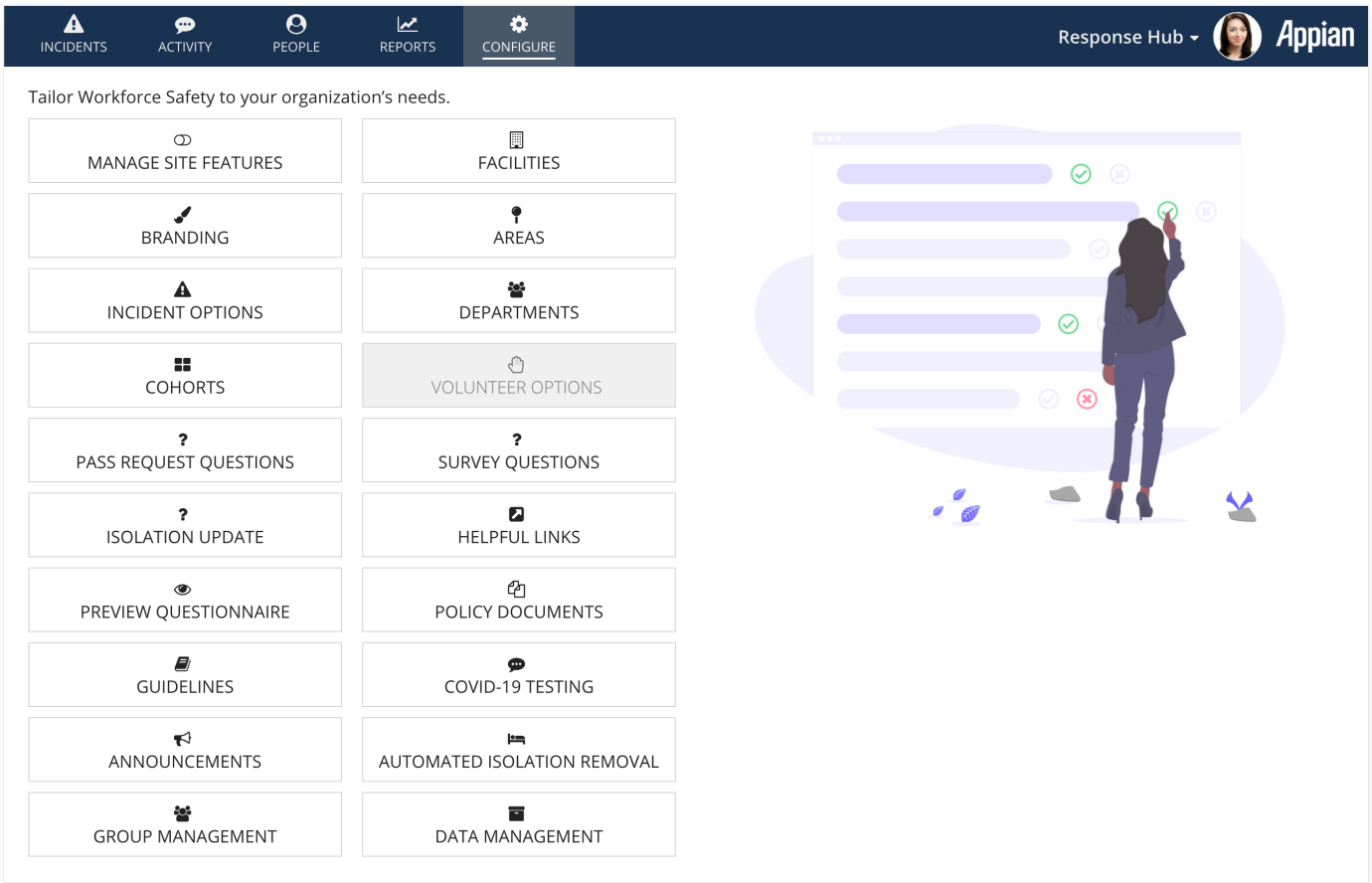
# Configuration Guide

## 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.
  - Group membership determines what users can see and do in the Response Hub.
- Determine when to archive data.

- Administrators can configure what data to archive and when to archive it, which may help Workforce Safety run faster.




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

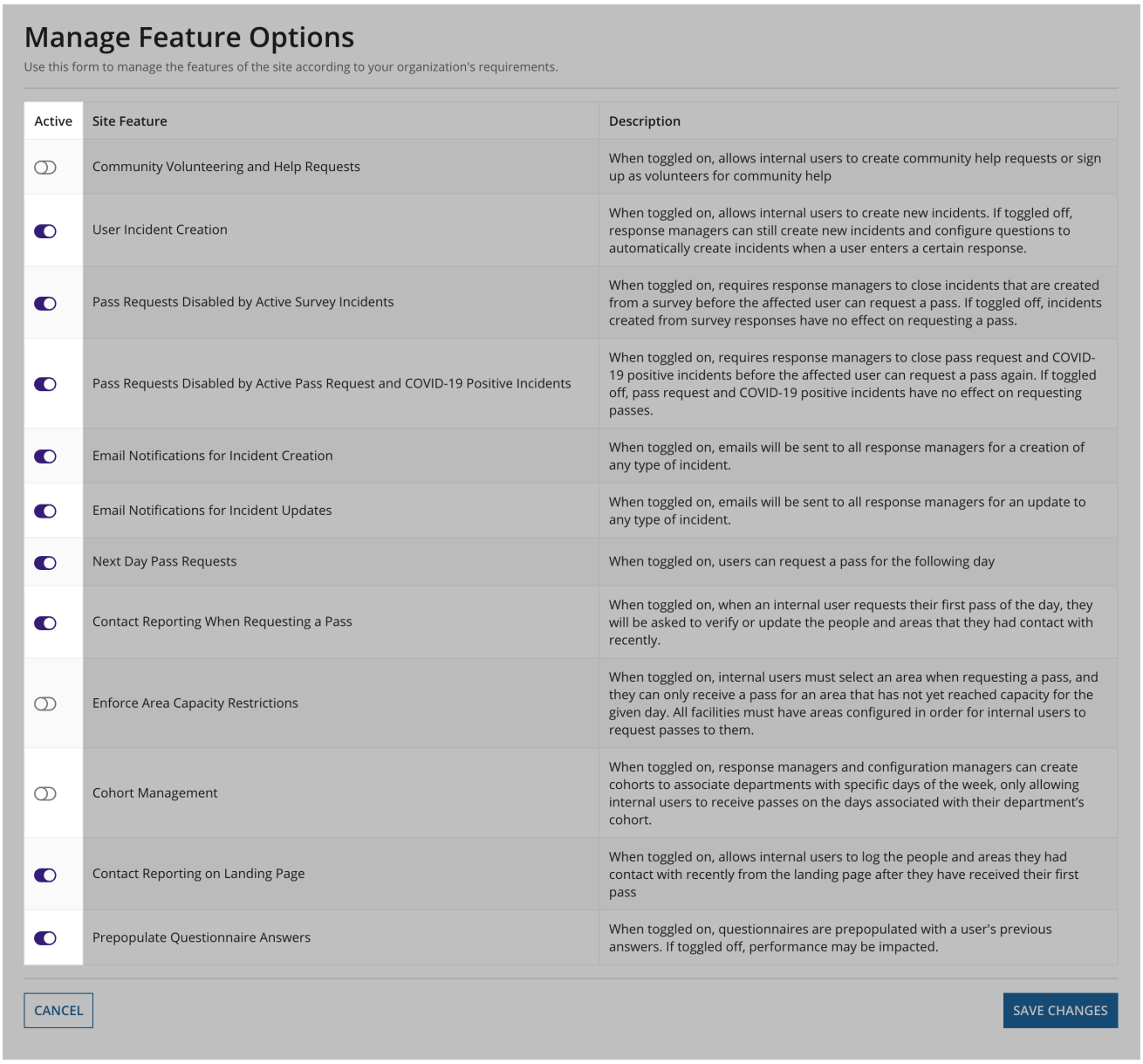
Some features of Workforce Safety can be turned on or off. Response and configuration managers can toggle them off and on using the Manage Site Features option.

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 |
|---|---|---|
| off | Community Volunteering and Help Requests | When toggled on, allows internal users to create community help requests or sign up as volunteers for community help |
| on | 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. |
| on | 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. |
| on | 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. |
| on | Email Notifications for Incident Creation | When toggled on, emails will be sent to all response managers for a creation of any type of incident. |
| on | Email Notifications for Incident Updates | When toggled on, emails will be sent to all response managers for an update to any type of incident. |
| on | Next Day Pass Requests | When toggled on, users can request a pass for the following day |
| on | 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. |
| off | 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. |
| off | 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. |
| on | 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 |
| on | Prepopulate Questionnaire Answers | When toggled on, questionnaires are prepopulated with a user's previous answers. If toggled off, performance may be impacted. |

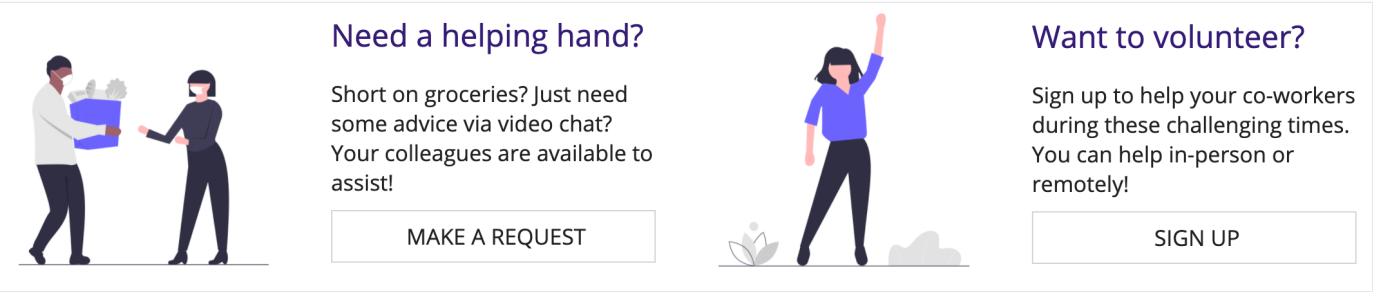
CANCEL SAVE CHANGES

## 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.

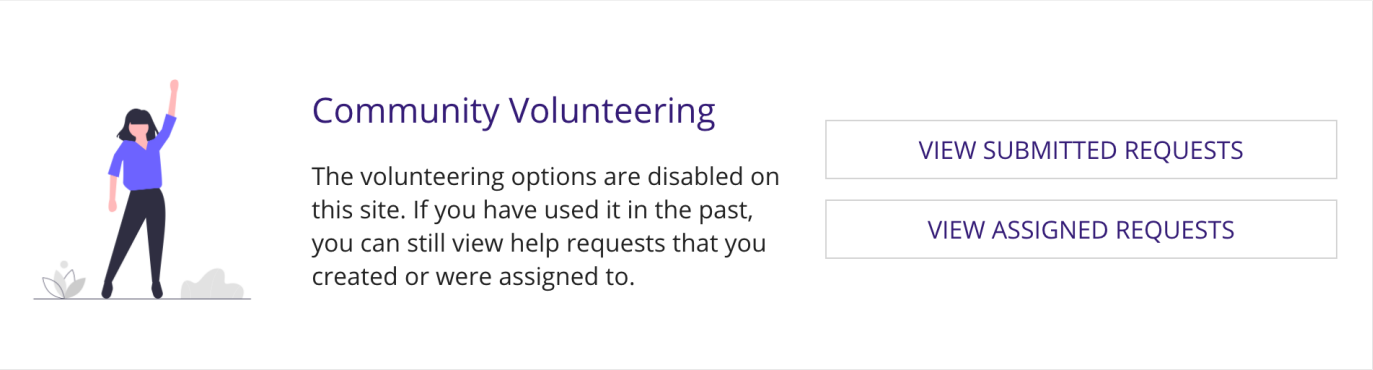
This feature allows users to make a request for help or sign up to volunteer to fulfill these help requests.



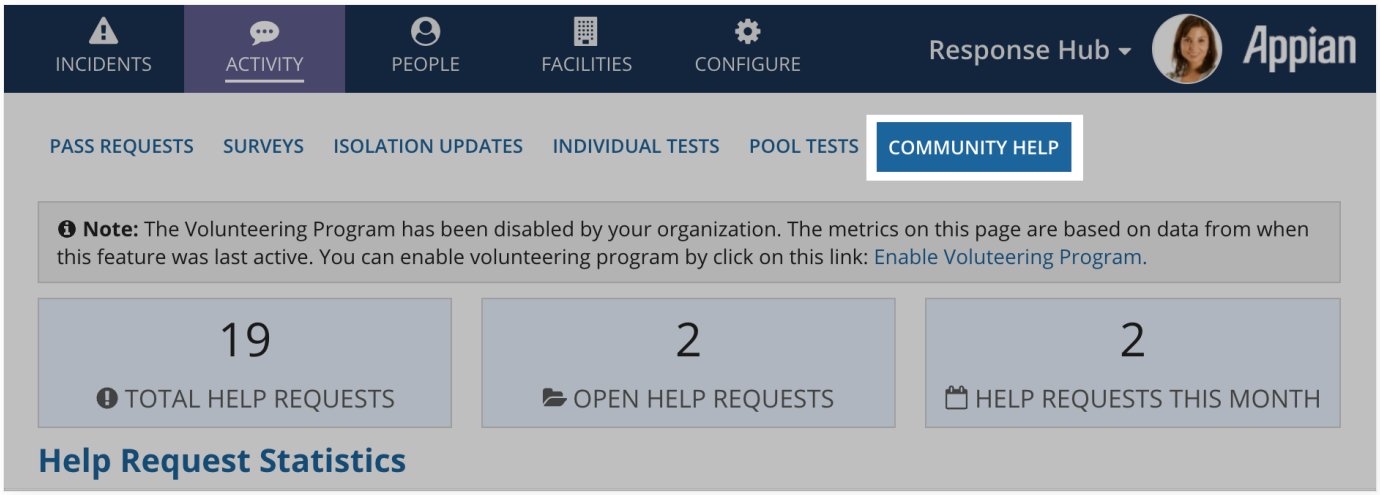

### What does toggling it on do?

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.



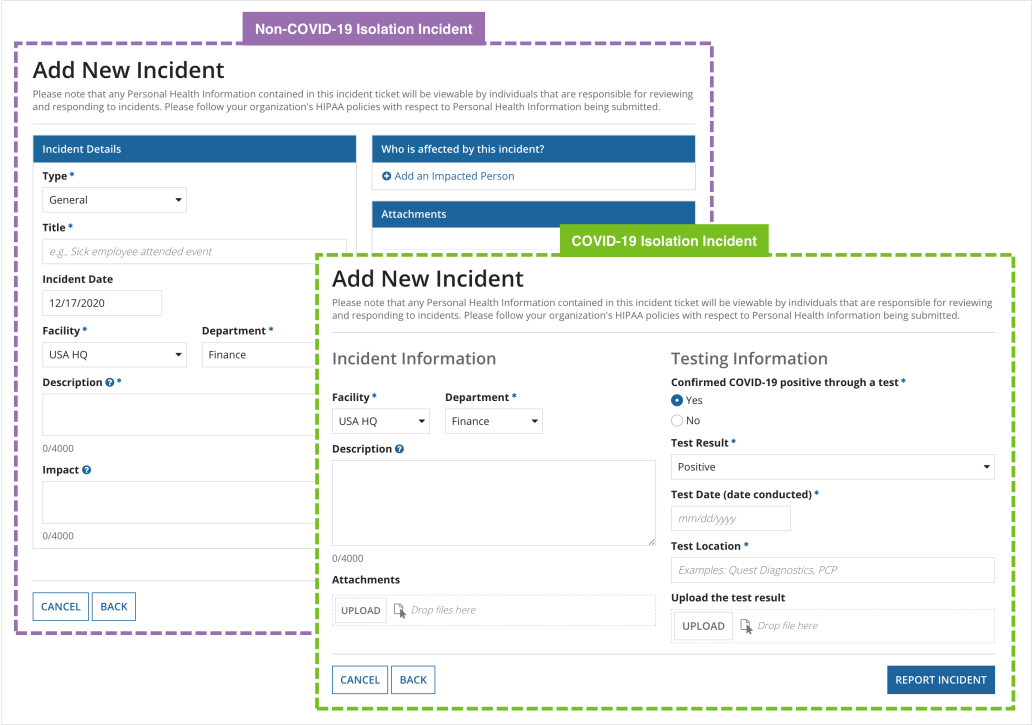

Additionally, in the **Response Hub**, past help requests and volunteer information will still be visible in the **COMMUNITY HELP** tab.




## User Incident Creation

### What is it?

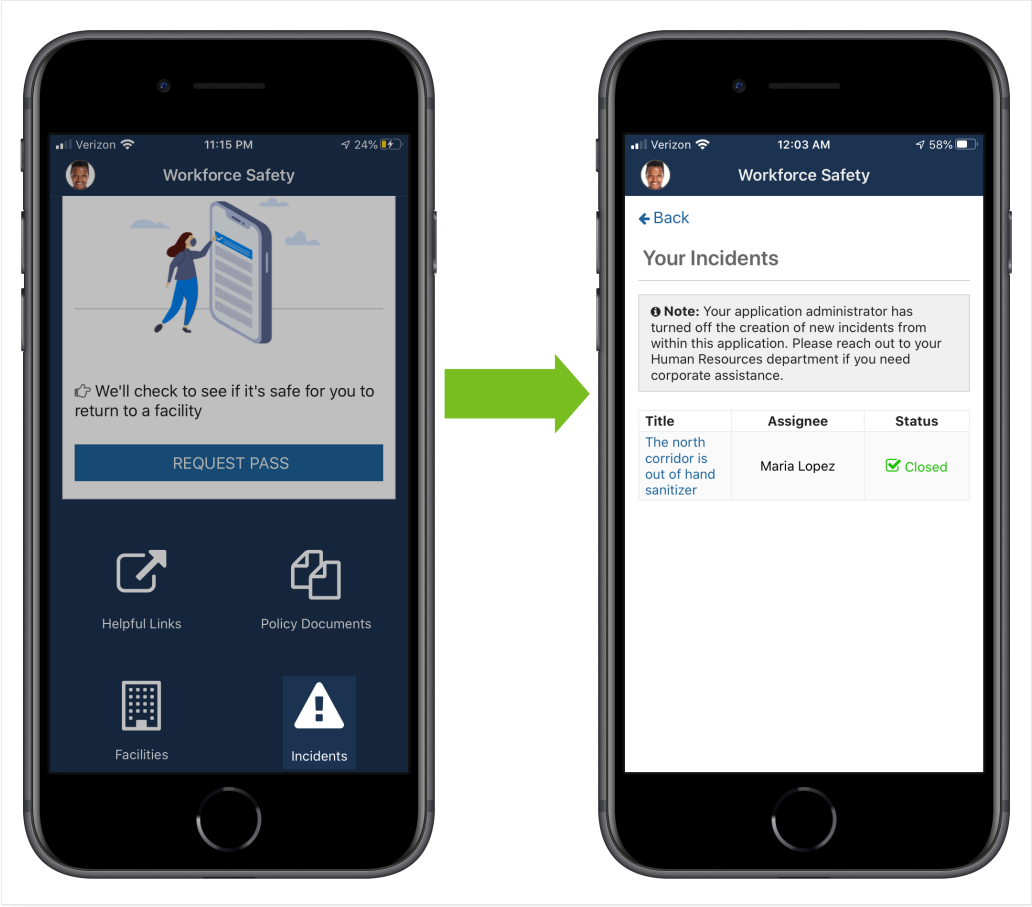
This feature allows users to report an issue to response managers by creating an incident.




## 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 Isolation Incidents

### 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 isolation incidents to report a positive diagnosis or symptoms of COVID-19, or to report contact with someone who tested positive for COVID-19.

When this feature is toggled on, response managers must close any pass request or COVID-19 isolation 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 isolation 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.

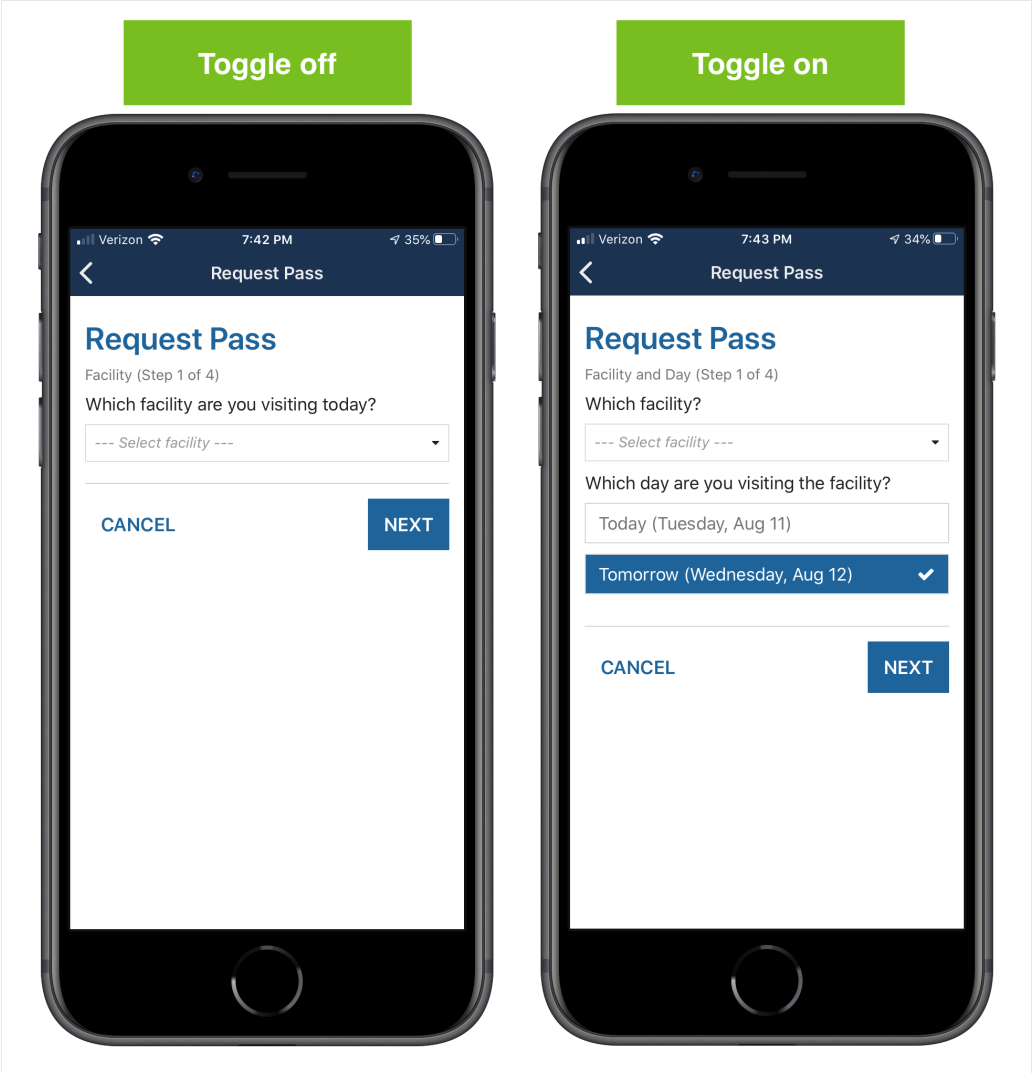
## Next Day Pass Requests

### 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?

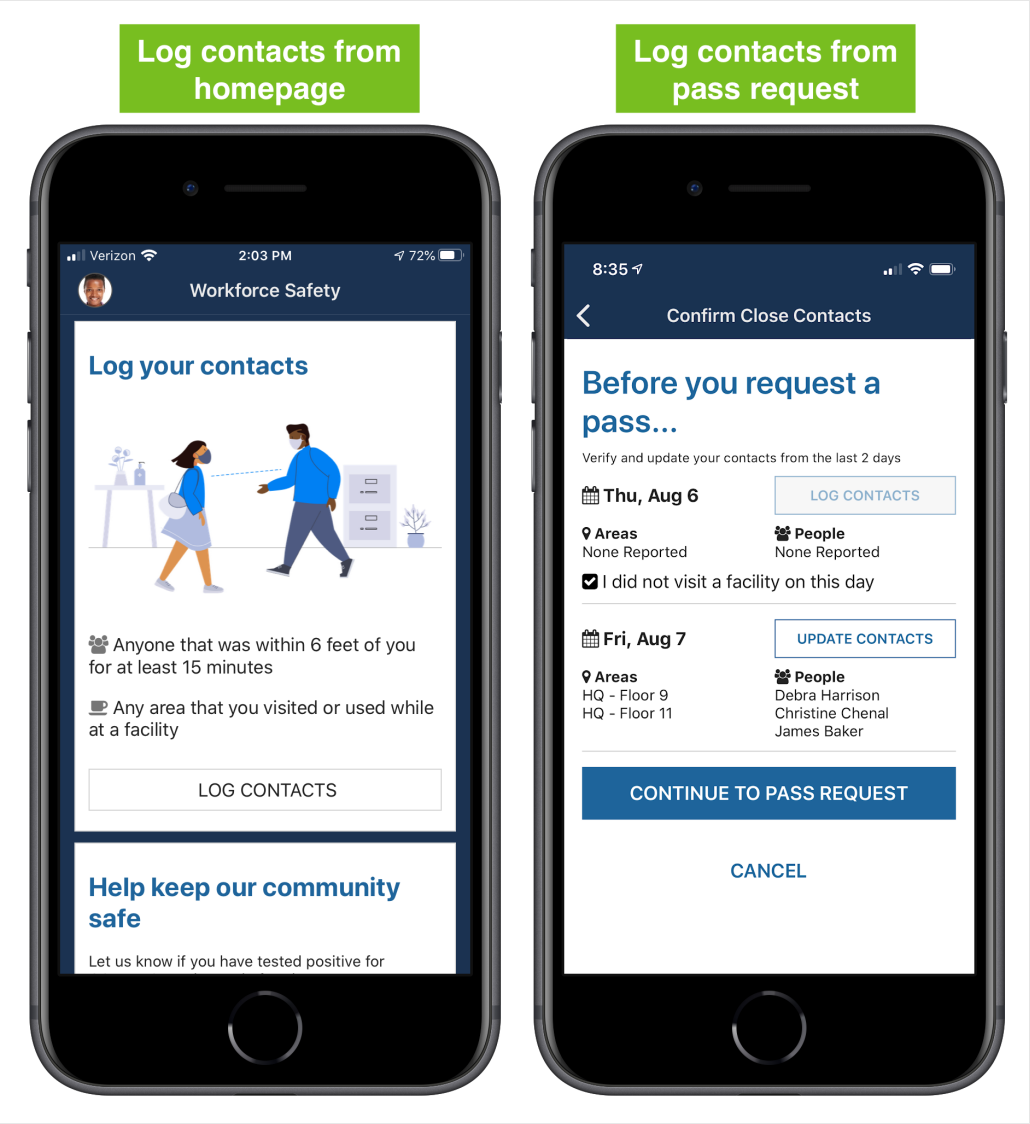
If toggled off, users will only be able to request a pass for the current day. Users will only be asked what facility they are requesting a pass for and the pass will automatically be granted for the same day.




## 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

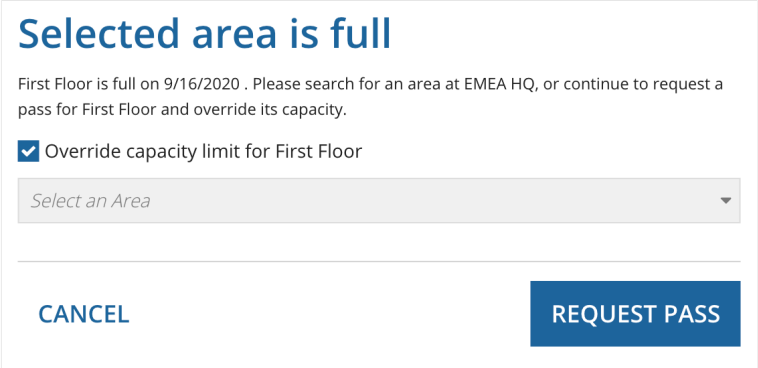
### What is it?

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.

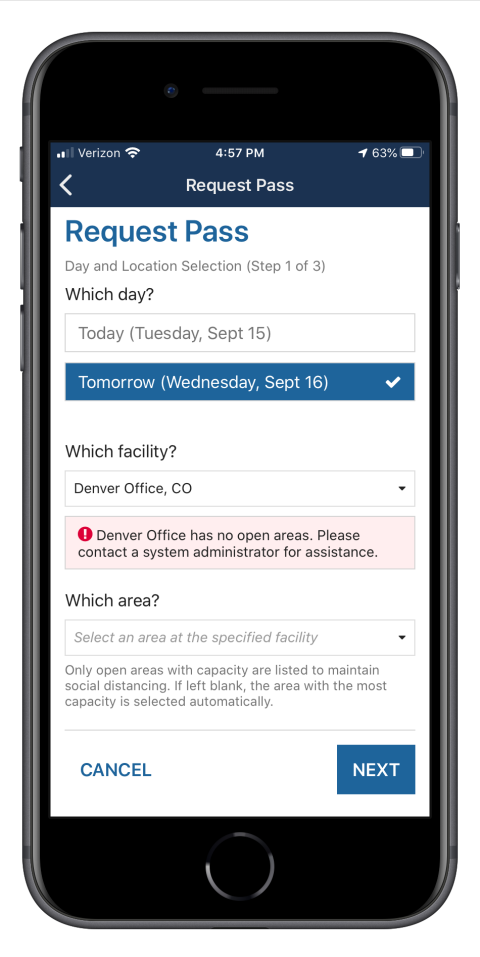



### What does toggling it on do?

> 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?

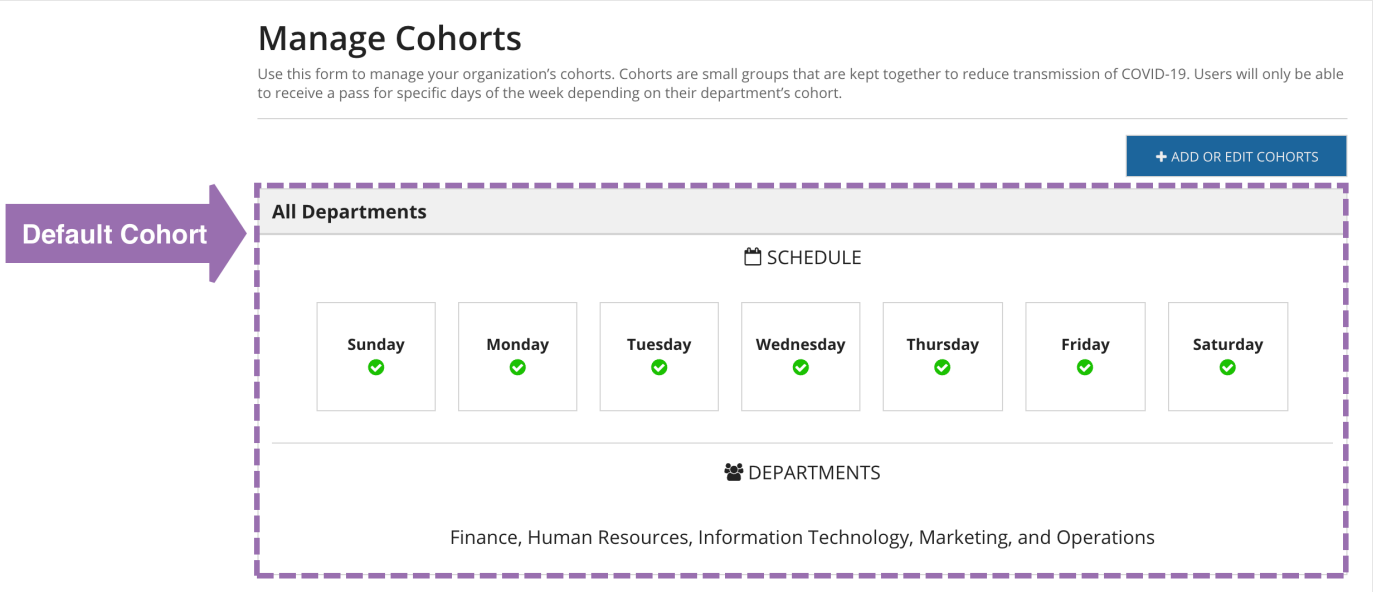
Cohorting is identifying groups (cohorts) and keeping them together to limit contact between members of each group. This can help limit the spread of COVID-19 to people outside of a cohort.

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?

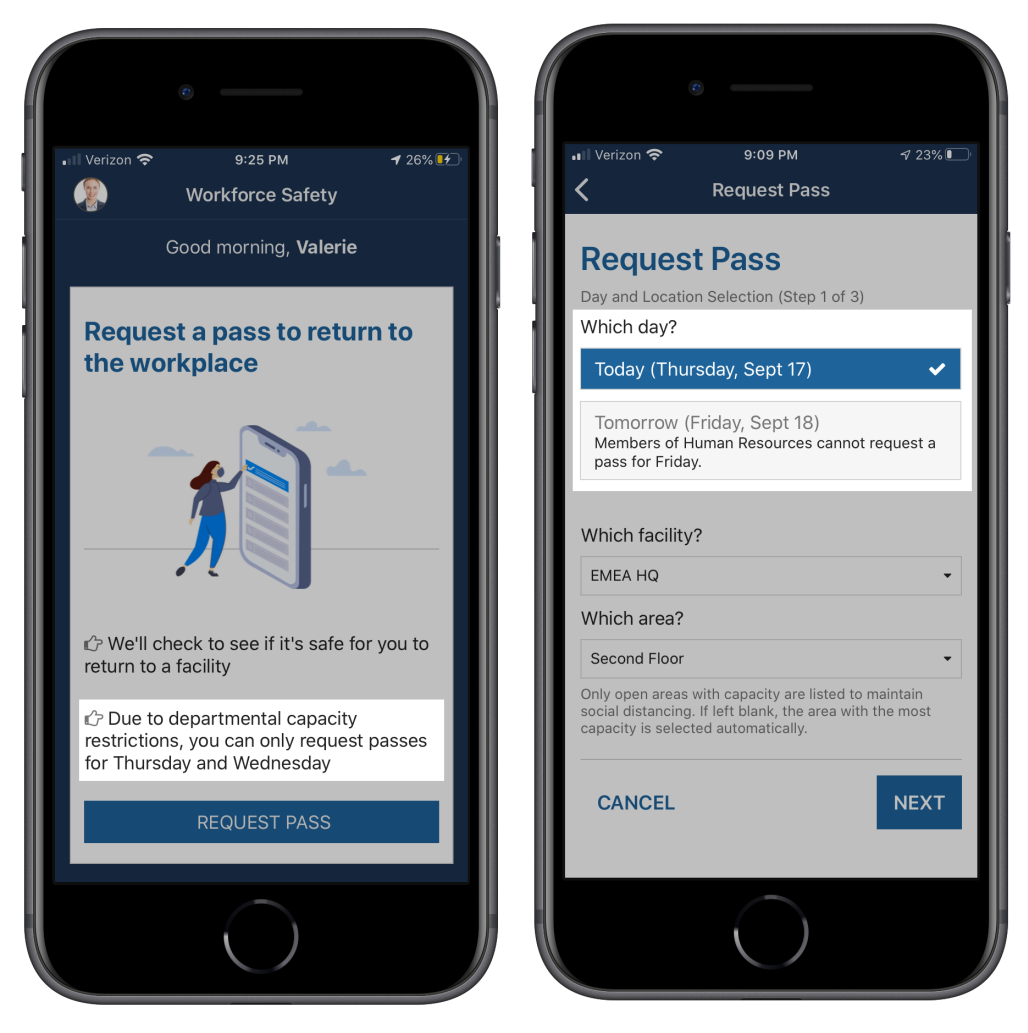
After you toggle on **Cohort Management**, a new **COHORTS** option is available on the **CONFIGURE** page. A default cohort is created which contains all departments and allows pass requests for all days. You can modify this cohort and create new cohorts by managing cohorts.

> 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

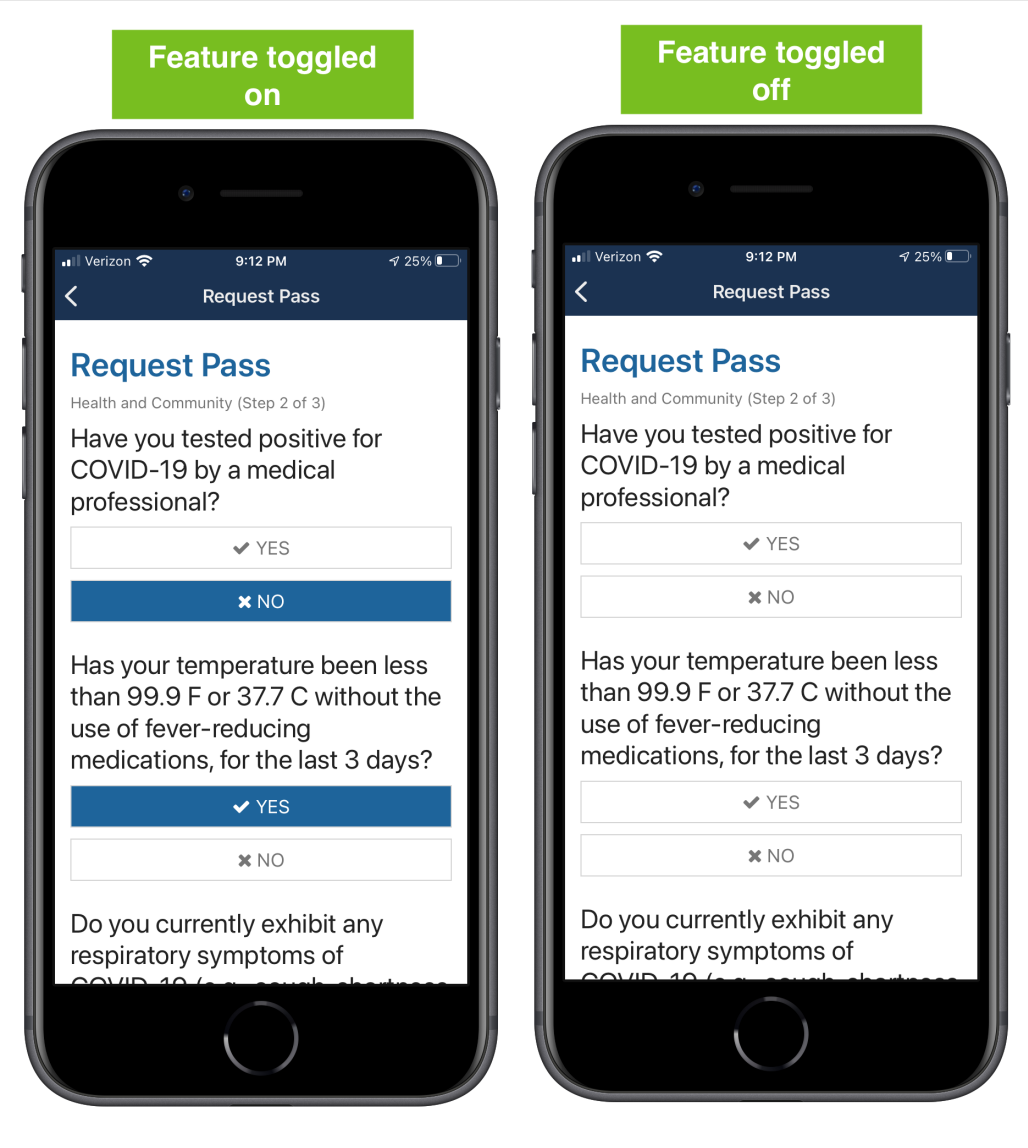
#### What is it?

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.



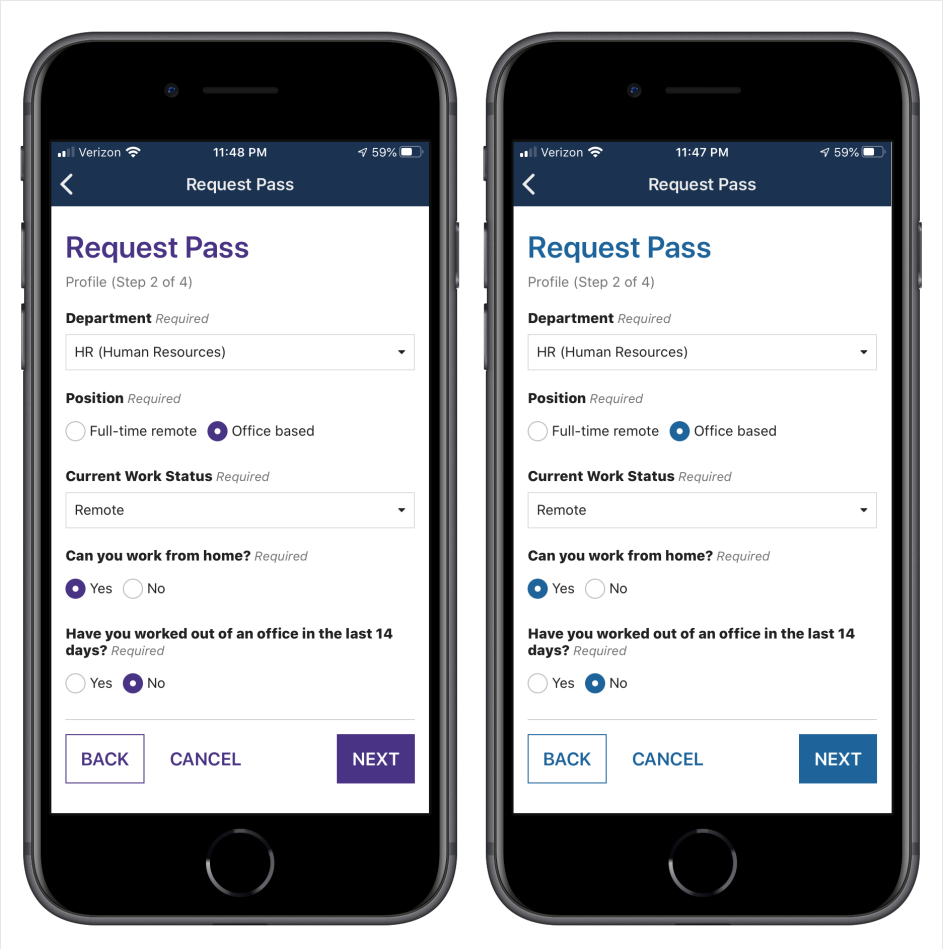

Keep in mind that this can affect the performance of Workforce Safety. If users are experiencing lag times, you may want to consider toggling this feature on.

## Configure site branding

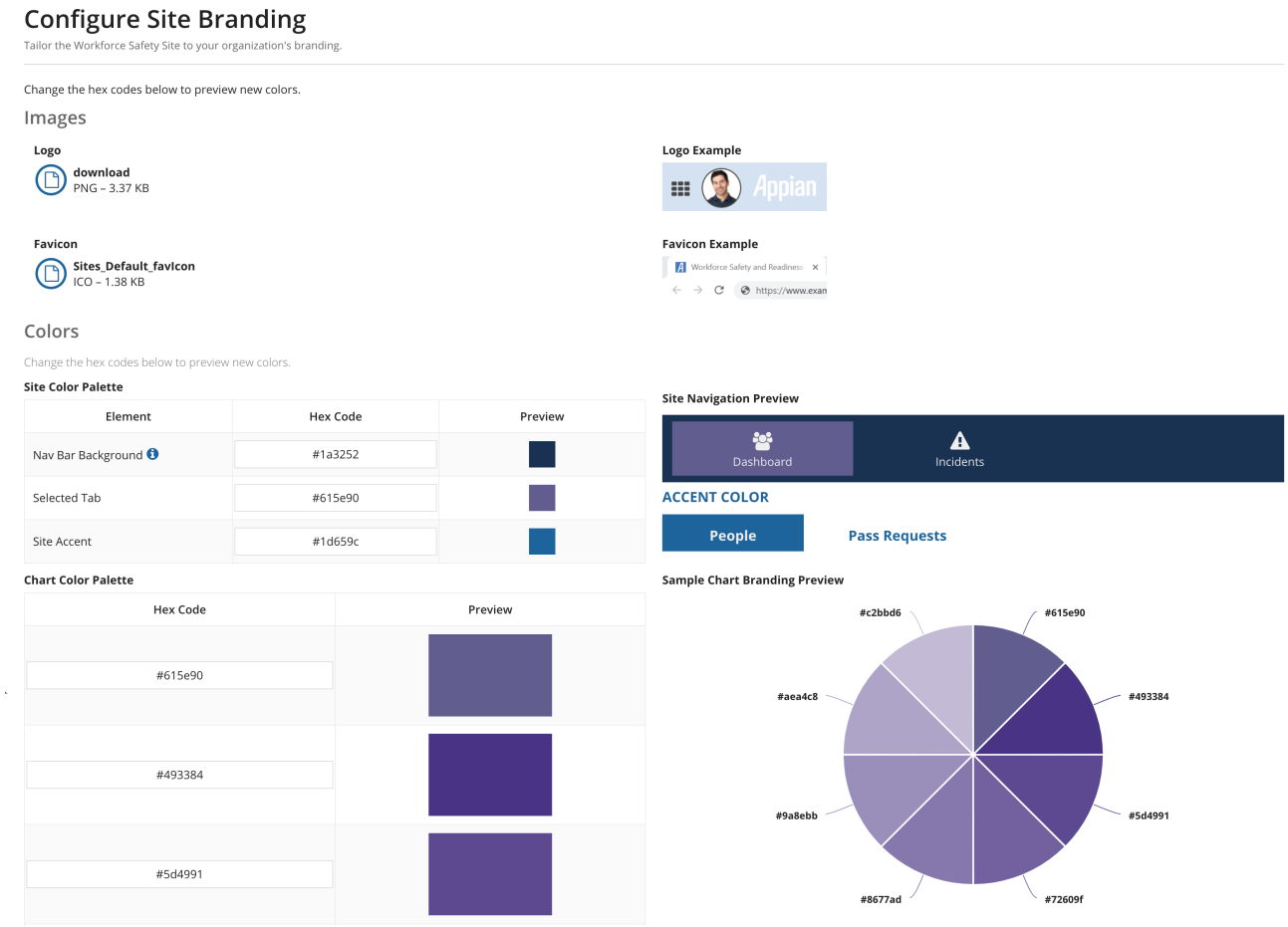
Response and configuration managers can tailor the look of Workforce Safety for your organization by changing the colors and logos.

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.

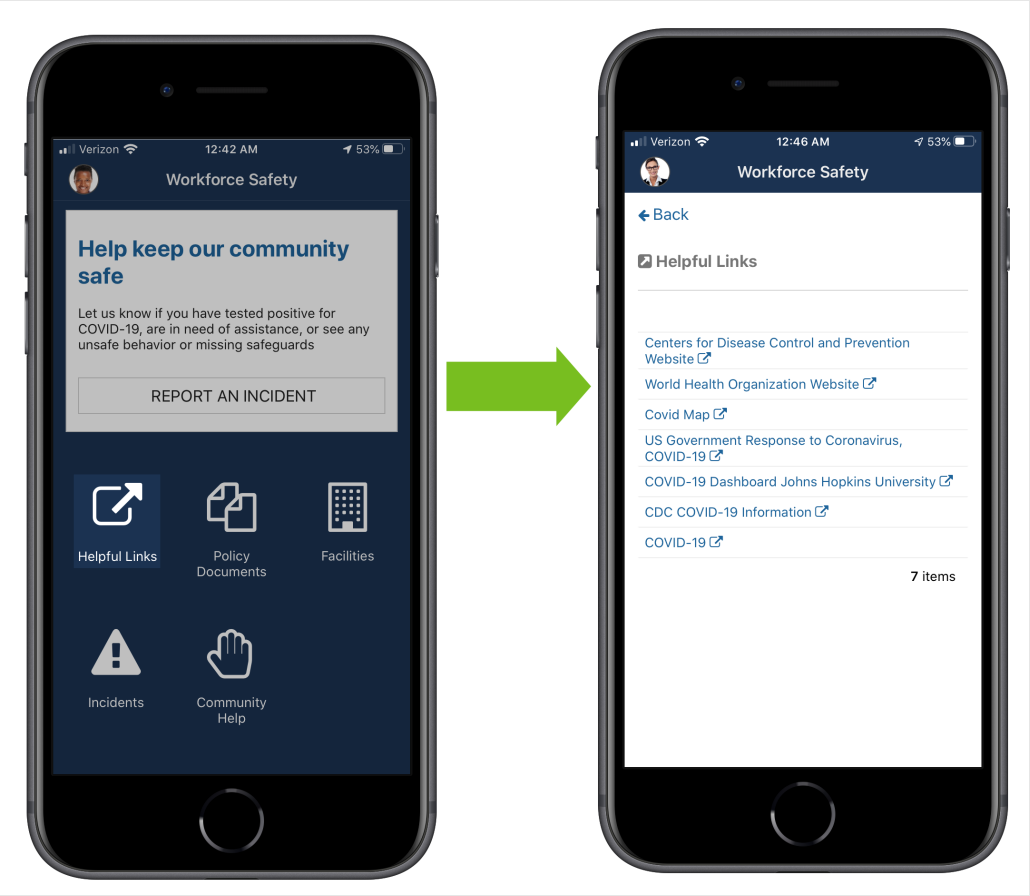



3. To change the colors used in charts on the **Dashboard** page in the **Response Hub**, update the hex codes for the **Chart Color Palette**.
    - **Tip**: Preview your chart color selections on the pie chart to the right.
4. Hover over the page icon until the **x** appears to remove the default **Logo** 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

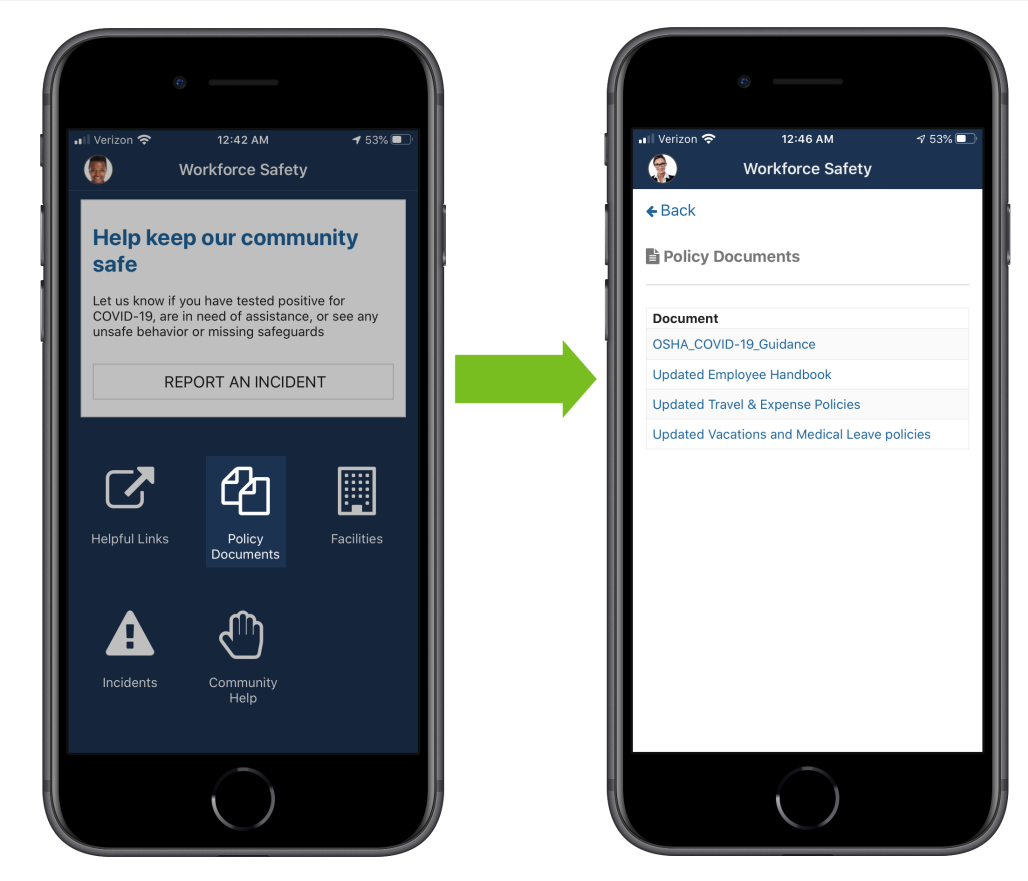
CANCEL

PREVIEW LINKS

SAVE LINKS

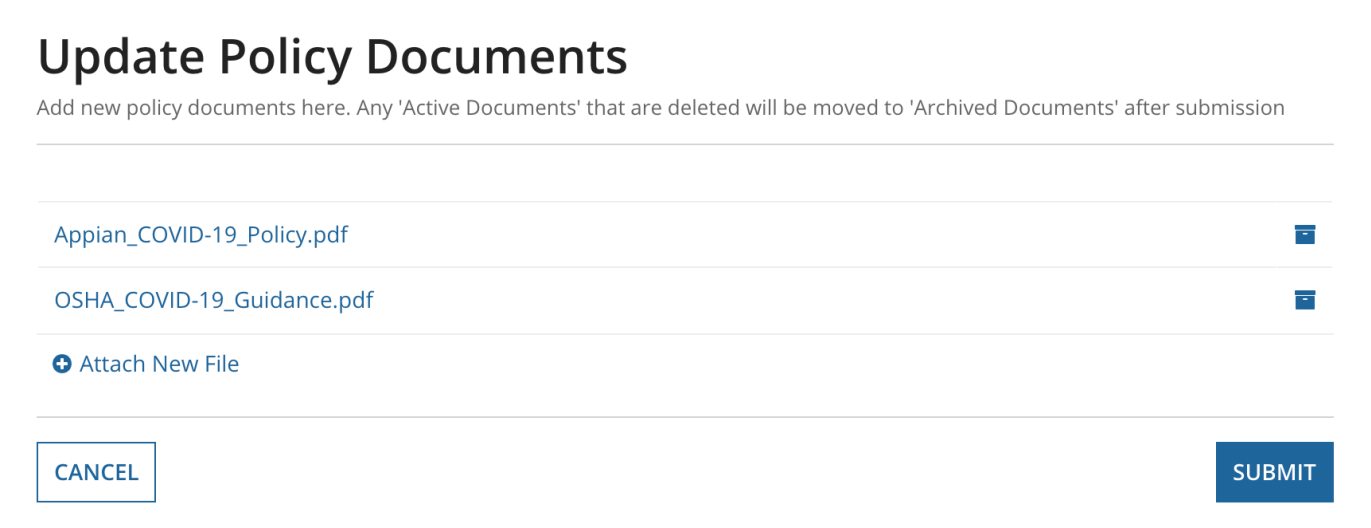
## Configure policy documents

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.

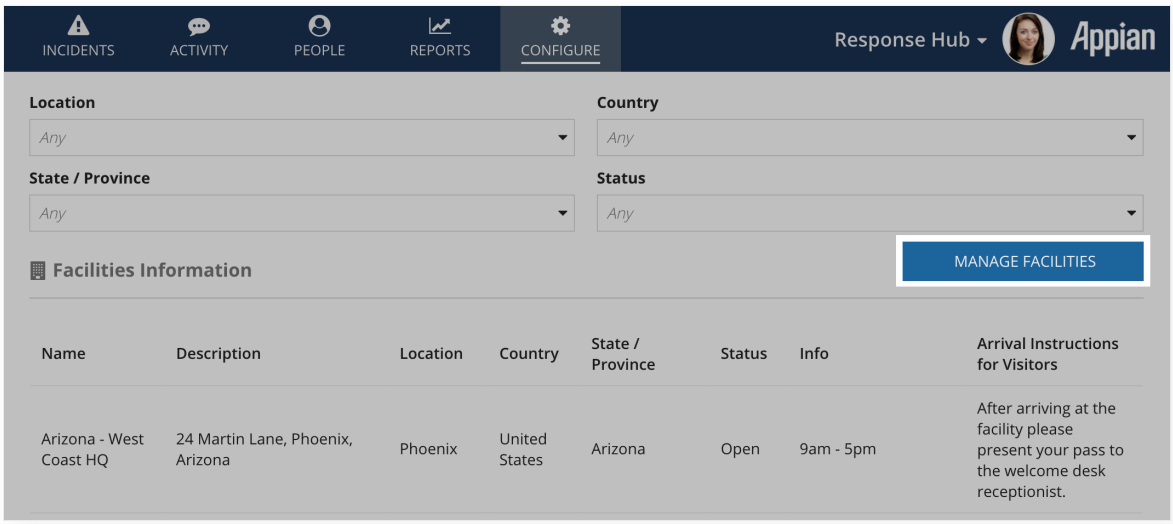
If you made a mistake when entering a facility and would like to remove it from the list of facilities, you can deactivate it. This is different than updating the facility status to closed, which indicates that the facility is closed temporarily.

When you deactivate a facility, the following happens:

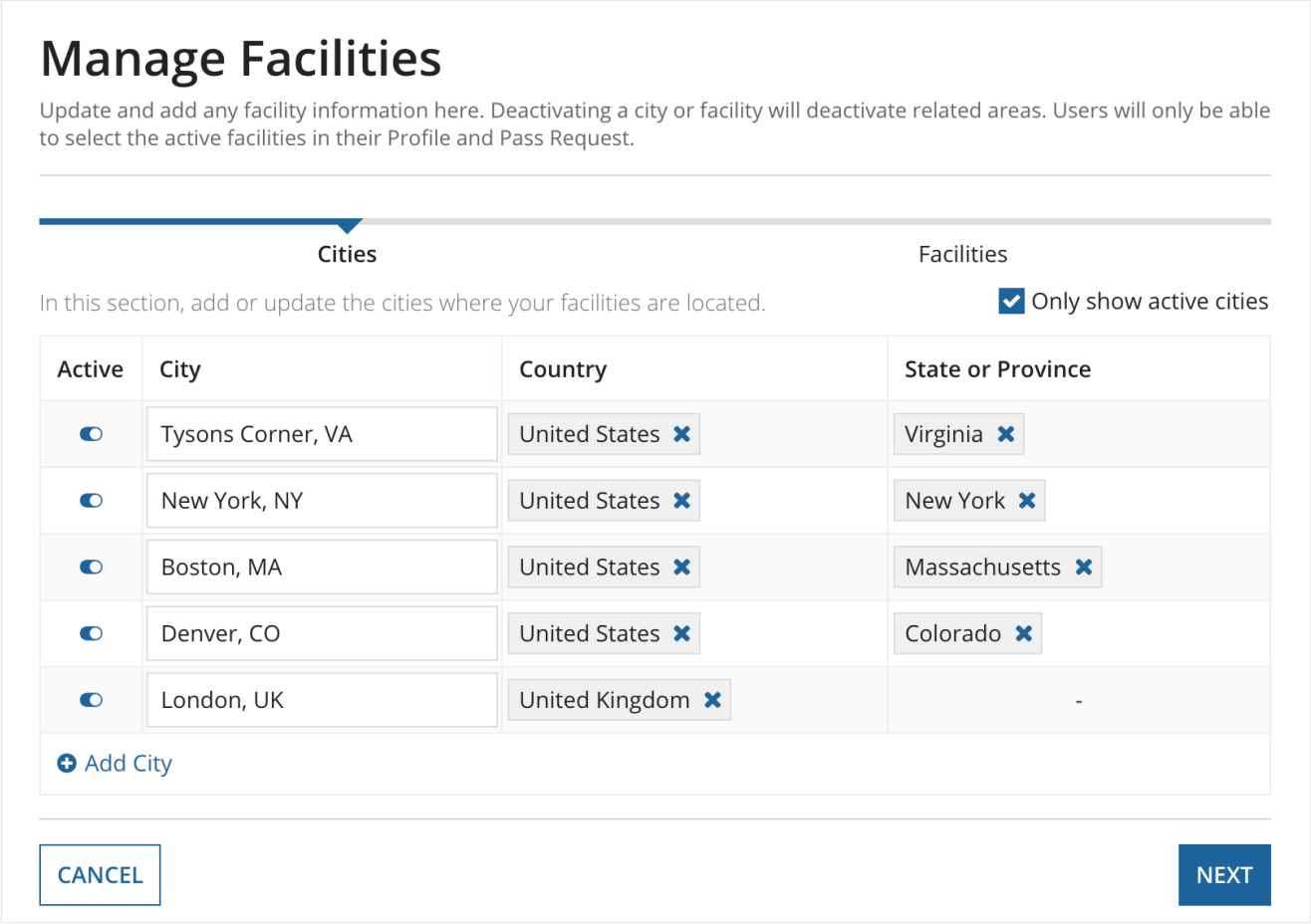
- Deactivated facilities will not show up as an option to select in any pass requests moving forward.
- Existing passes will continue to have the deactivated facility.
- Deactivated facilities still show up in pass request reporting.

To update facility information:

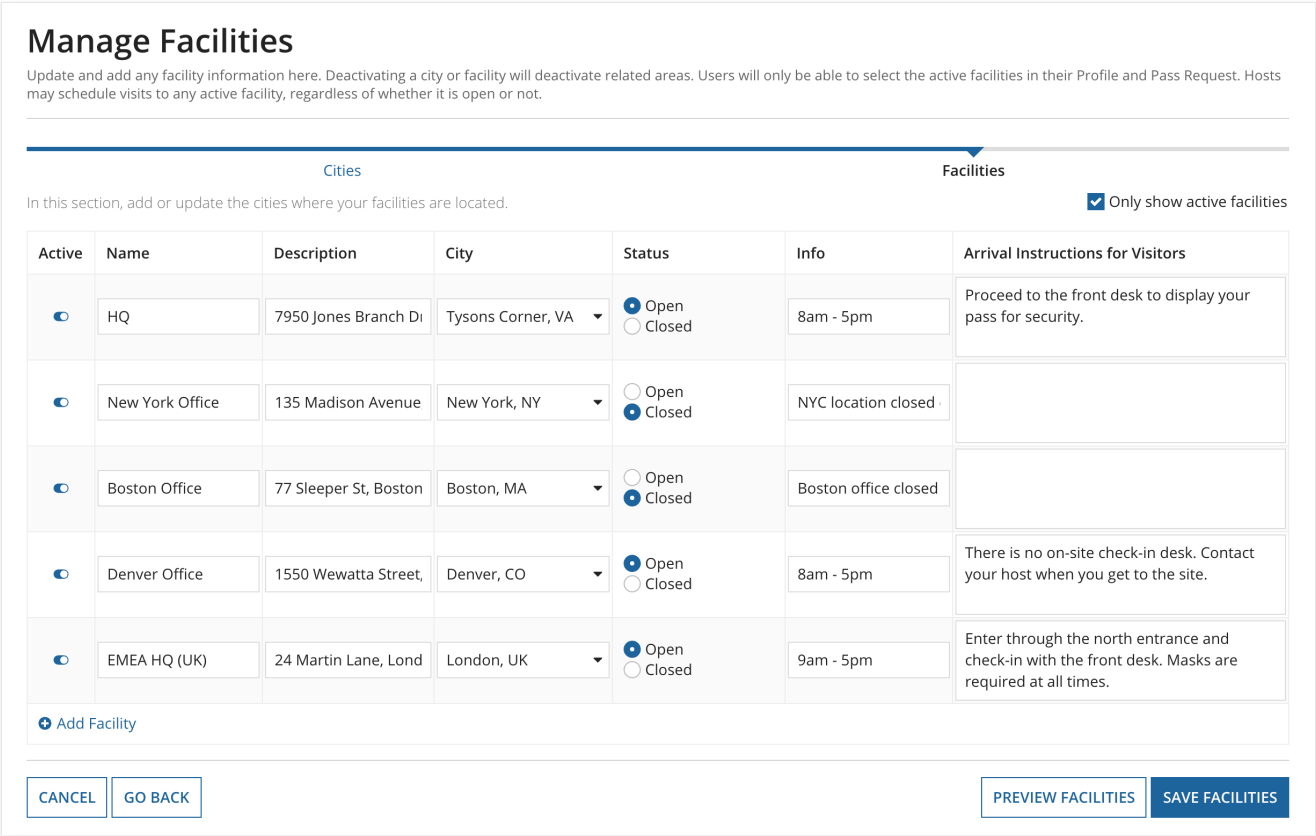
1. From the **CONFIGURE** page, click **FACILITIES**.
2. Click **MANAGE FACILITIES**.



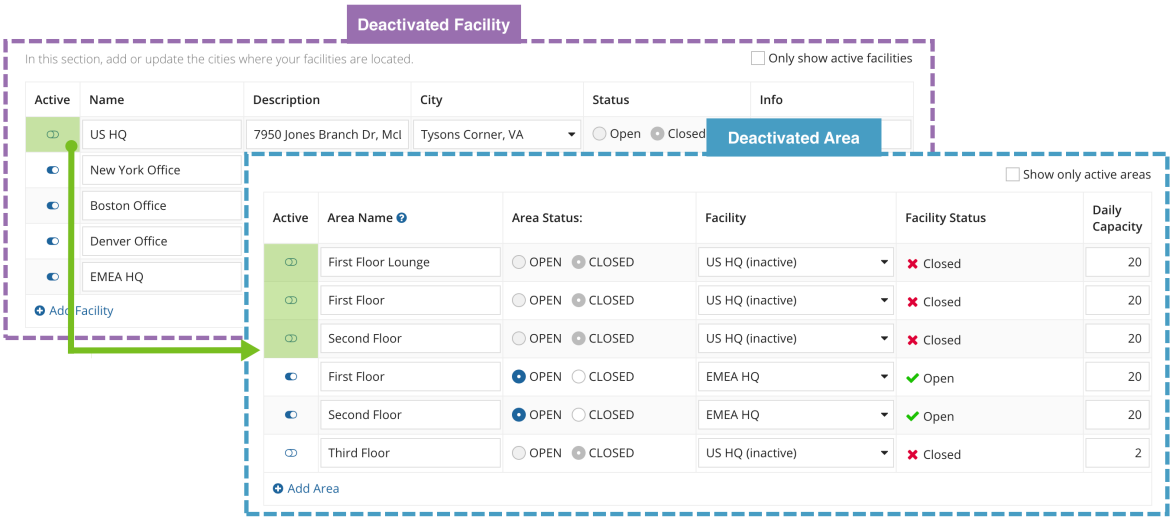

1. Add the city, country, and state or province for each of your facilities and click **NEXT**.
2. To deactivate a city, toggle the active icon to inactive . Before you can save your changes, you must update any facilities that have a deactivated city selected.




3. 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.




4. 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.

5. 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.

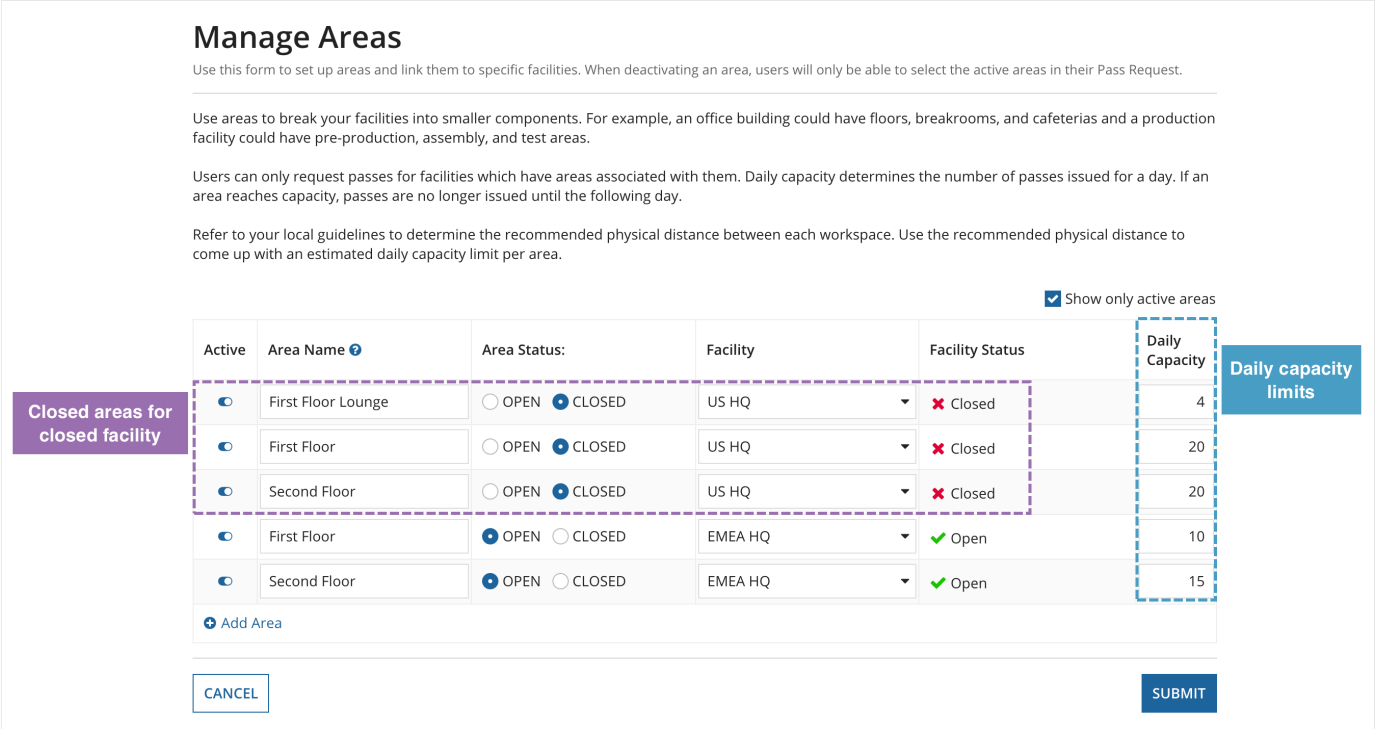
If you made a mistake when entering an area and would like to remove it from the list of areas, you can deactivate it. This is different than updating the area status to closed, which indicates that the area is closed temporarily.

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.

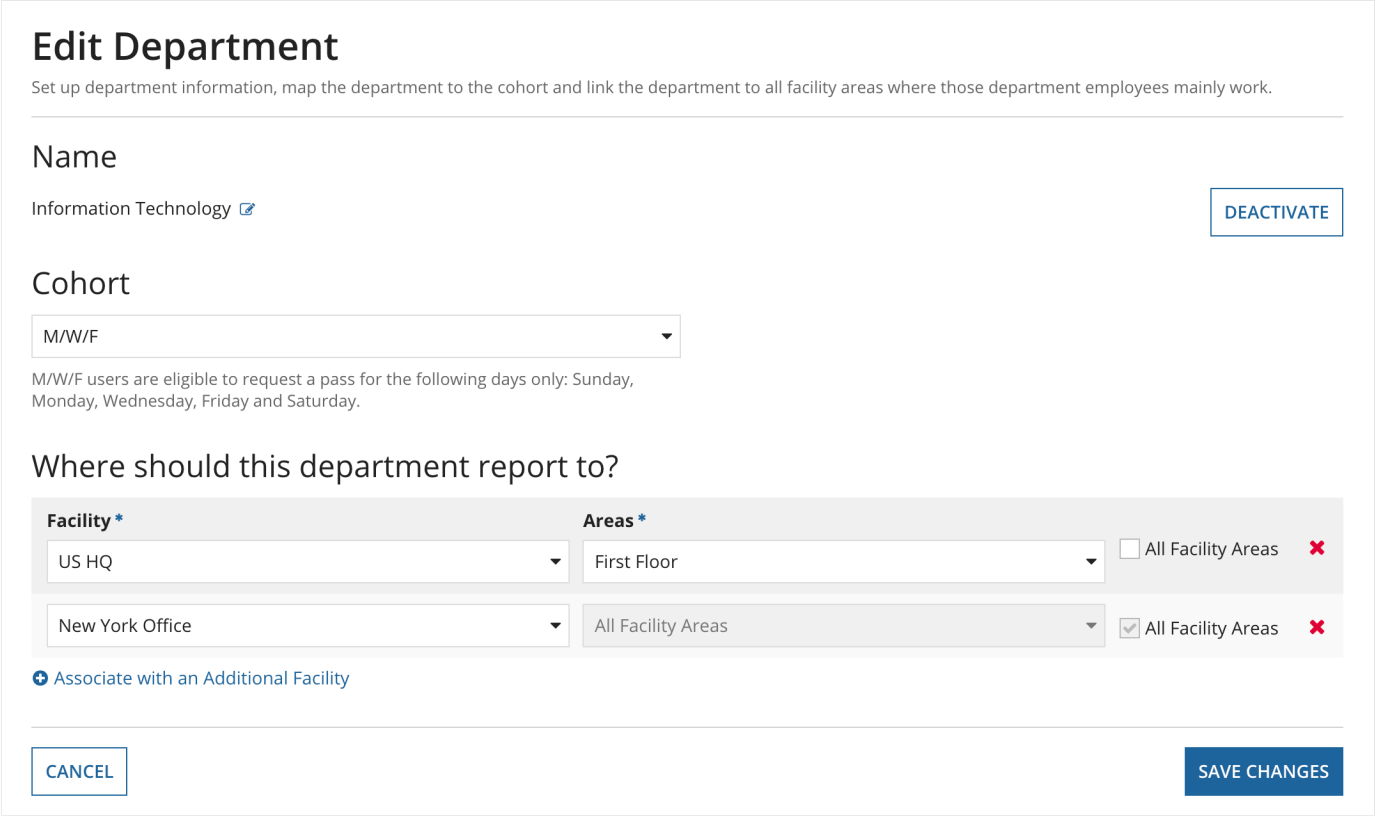
When you deactivate a department, the following happens:

- 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.

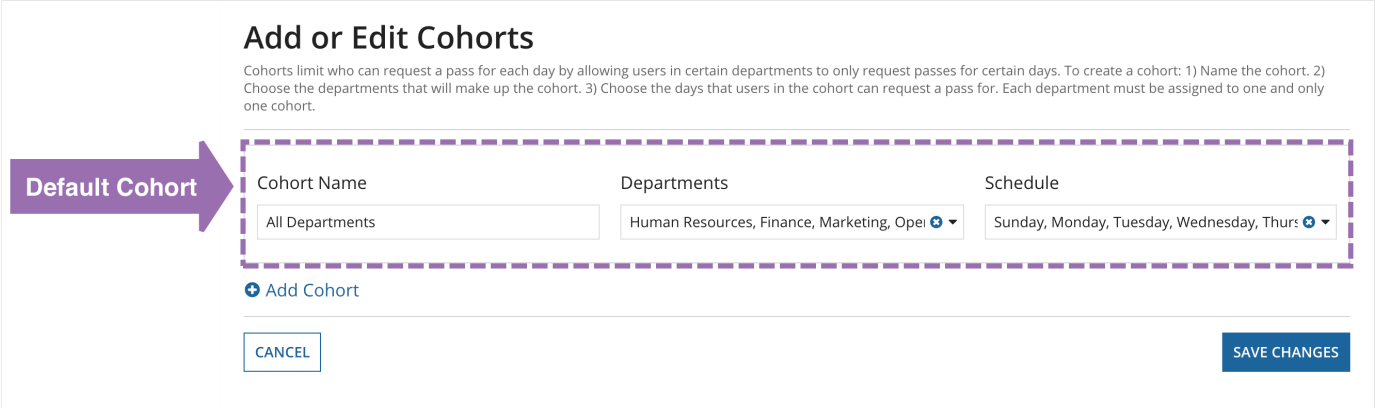
## Restrictions when creating cohorts

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.

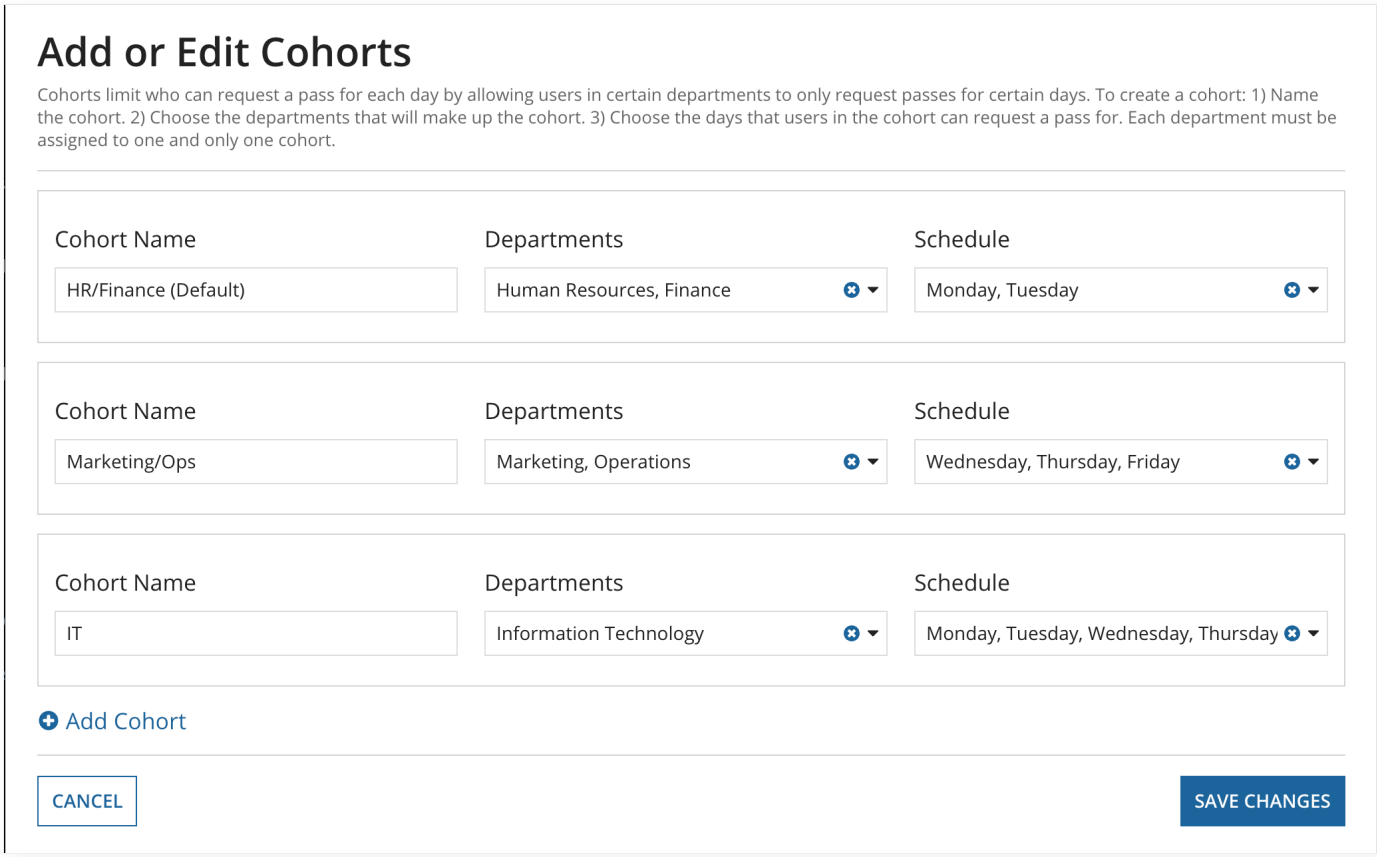



Because each department can only be in one cohort, before you add any new cohorts you have to remove departments from this cohort. We also suggest renaming it from "All Departments."

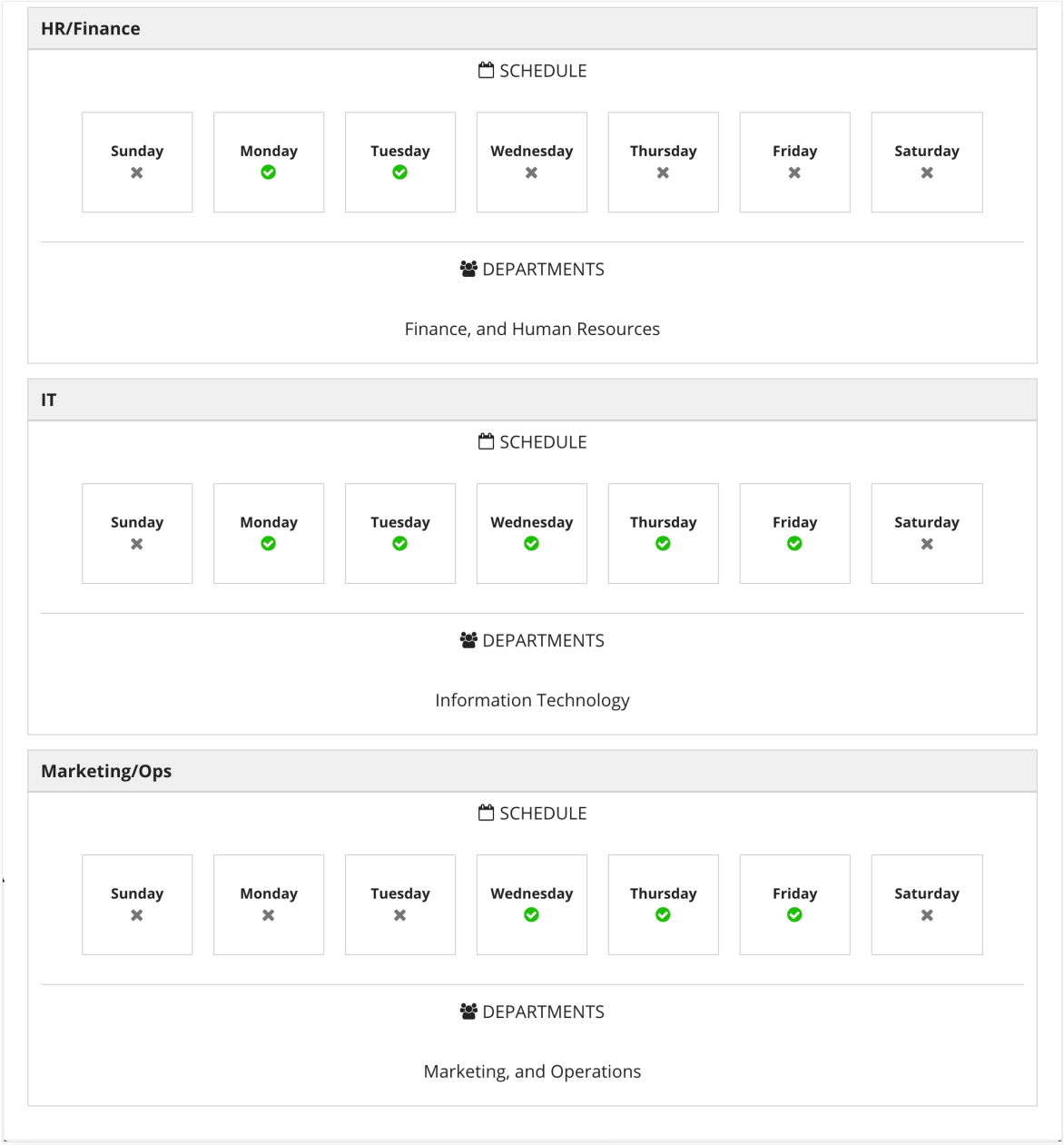
## Managing cohorts

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.

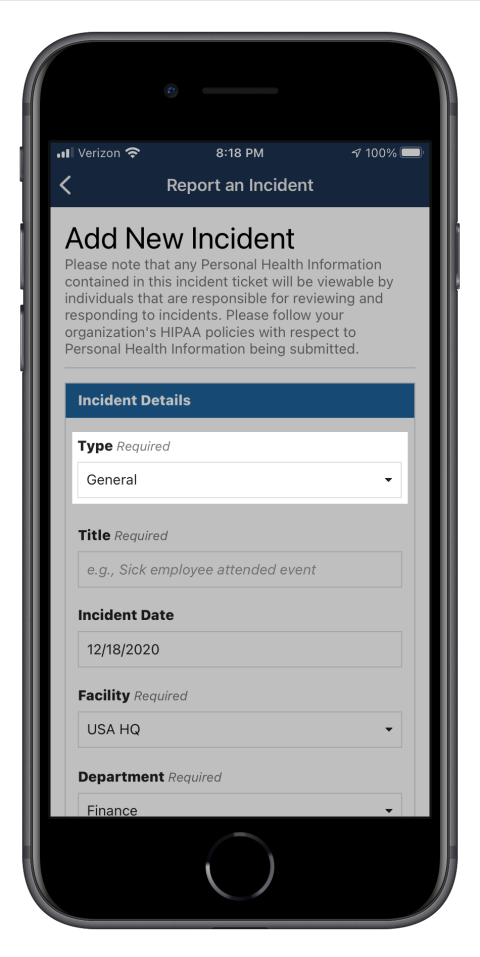


The configured cohorts display on the Manage Cohorts screen.



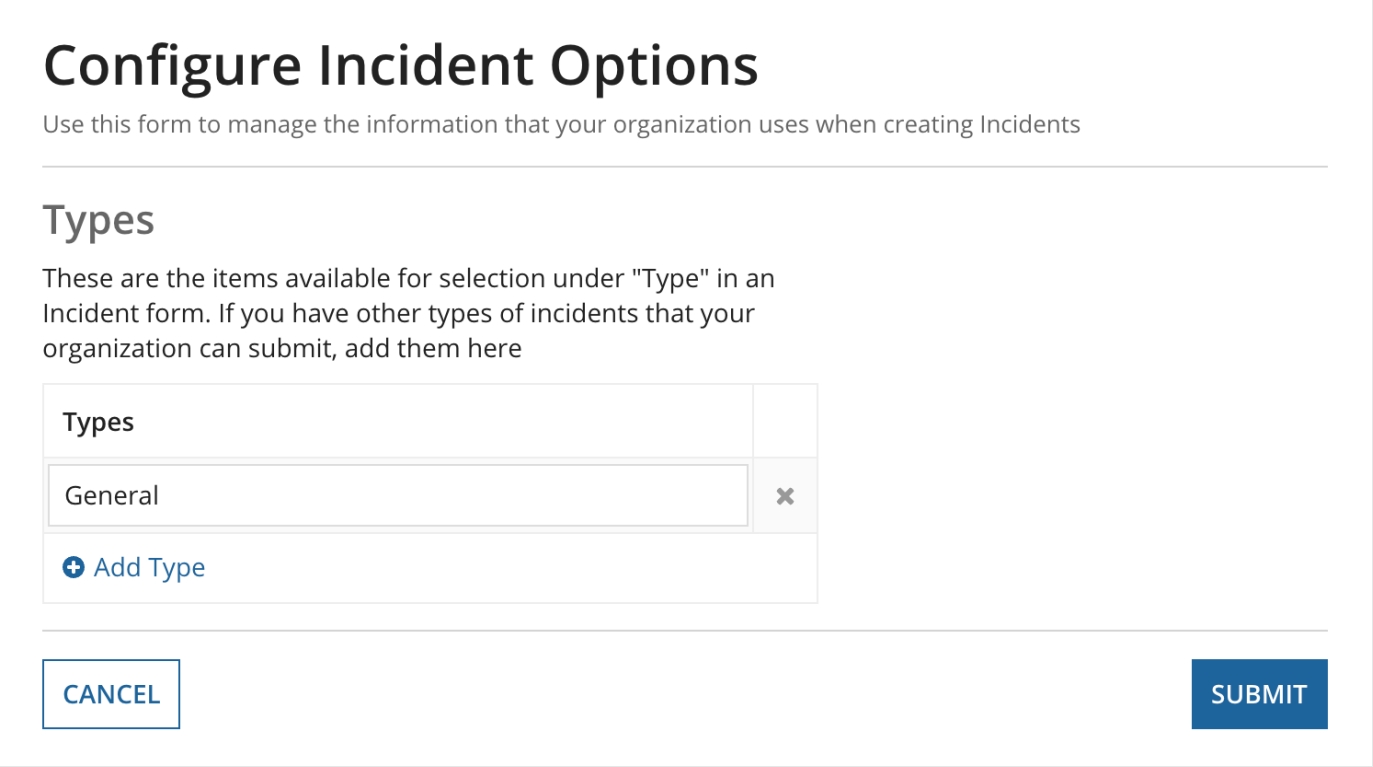

## Configure incident options

When users fill out the incident form, they can choose an incident **Type**. Response and configuration managers can add and rename these incident types.




To configure incidents types:

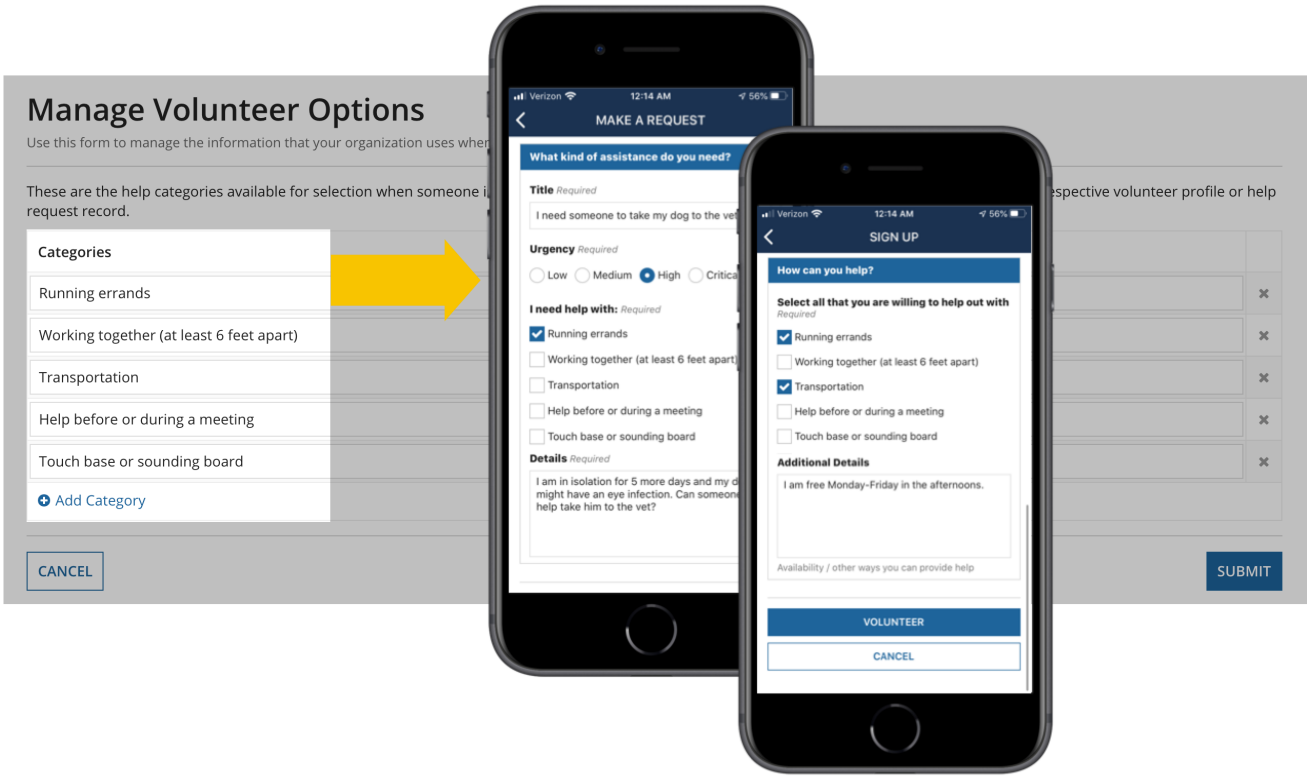
1. Click **INCIDENT OPTIONS**.
2. If necessary, rename the existing **Types**.
3. To add a new type of incident, click **Add Type** and enter a name for the new type and click **SUBMIT**.



# 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.



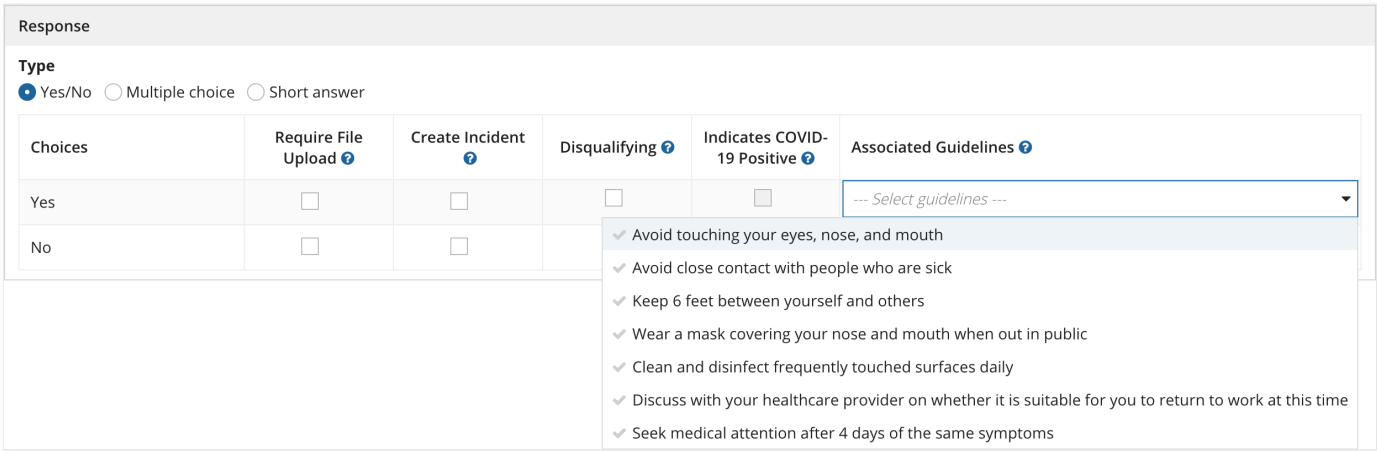

After a volunteer category is added, it can't be deleted, but it can be renamed. This is also true for the default volunteer categories.

To update or add volunteer categories:

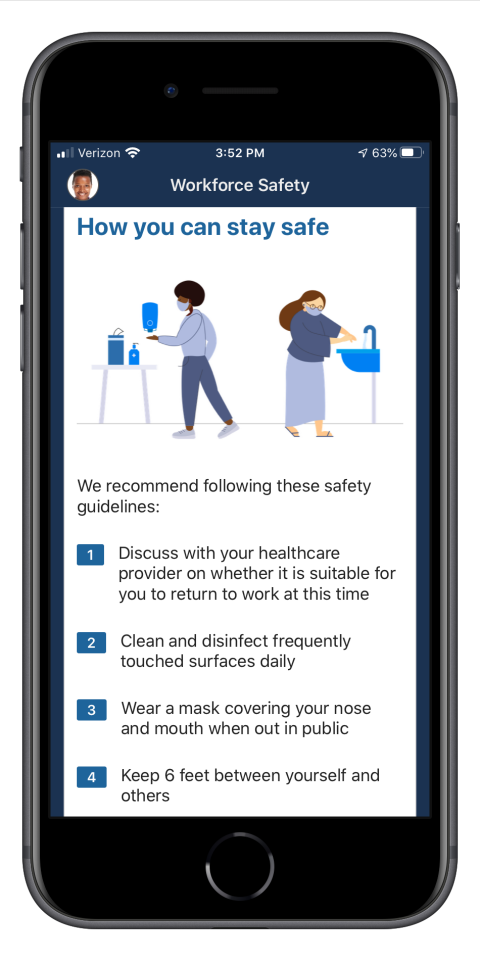
1. Click **VOLUNTEER OPTIONS**.
2. If necessary, rename the existing **Categories**.
3. To add a new category, click **Add Category** and enter a new category.

# 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 Isolation Incident Creation**: For pass request and isolation update questions, whether a certain response to the question indicates that a COVID-19 isolation incident should be created.
- **Guidelines**: Which guidelines to display to the user for each response choice. See Configure guidelines for more information on adding and deactivating guidelines.
  - **Example**: If the user answers yes to a question about a health issue, you could display a guideline that says *Discuss with your healthcare provider on whether it is suitable for you to return to the workplace at this time*.
- **Visibility**: Whether the question should display only for users at certain locations, users who have certain positions, or visitors.

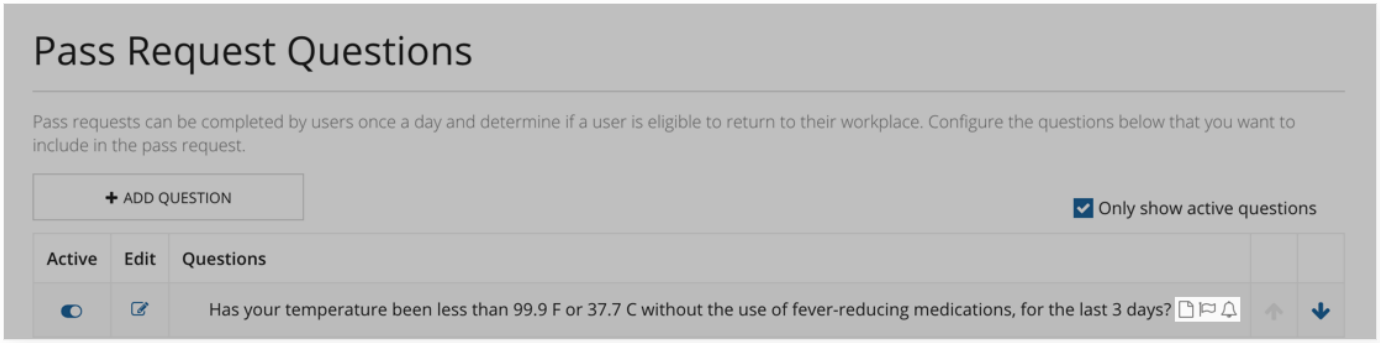
> If an incident is created when a user fills out a pass request or survey, that incident will be updated each time a user fills out the pass request or survey again.

## Viewing and modifying questions

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

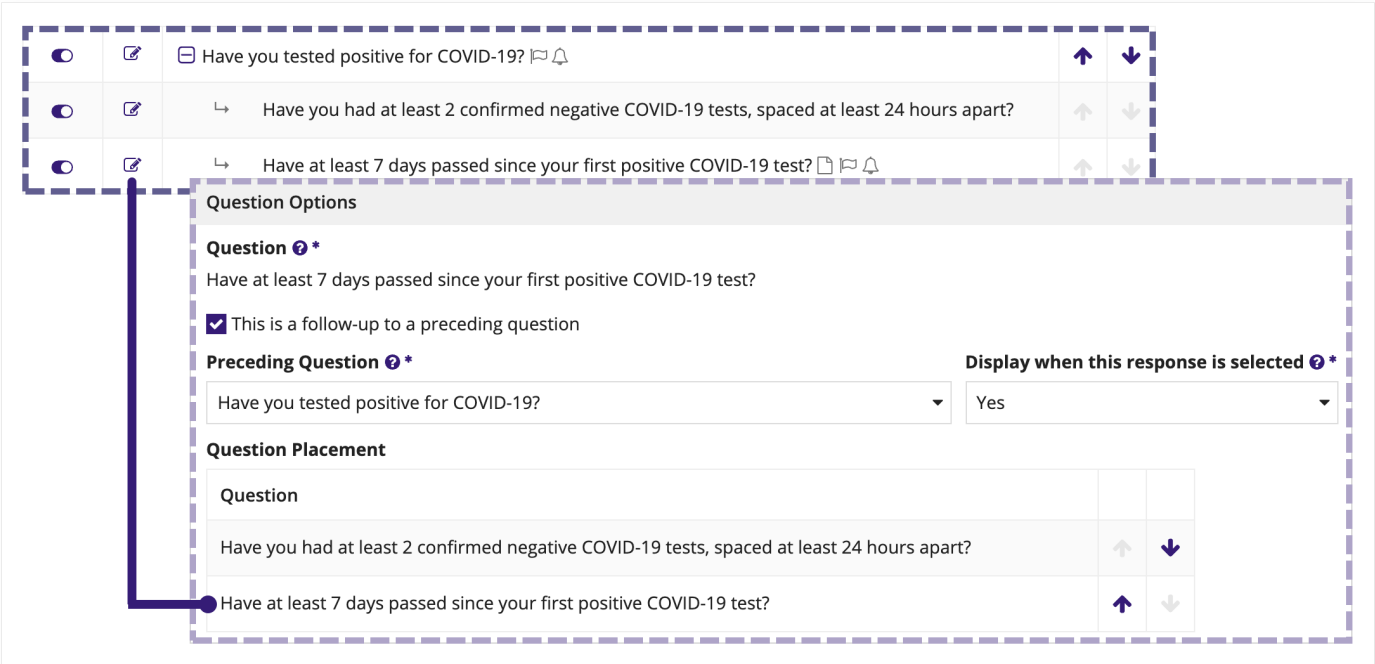
Icons next to each question display a quick view of whether the question:

- 🏳: 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.



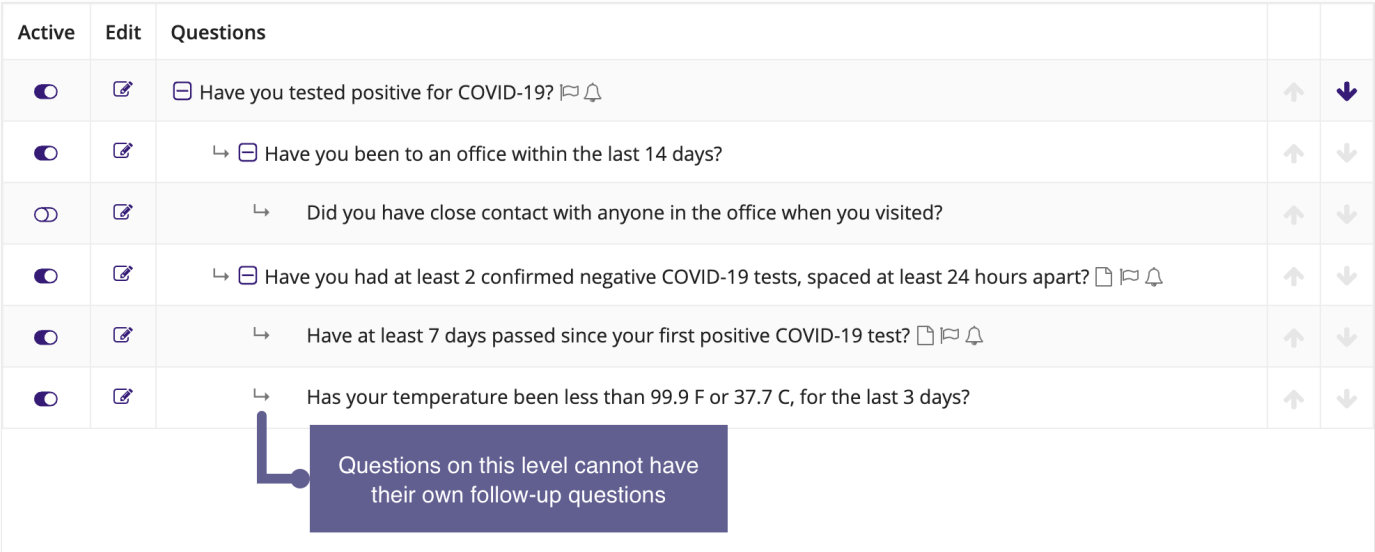

To deactivate a question, toggle the active icon ◐ to inactive ○.

## 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.

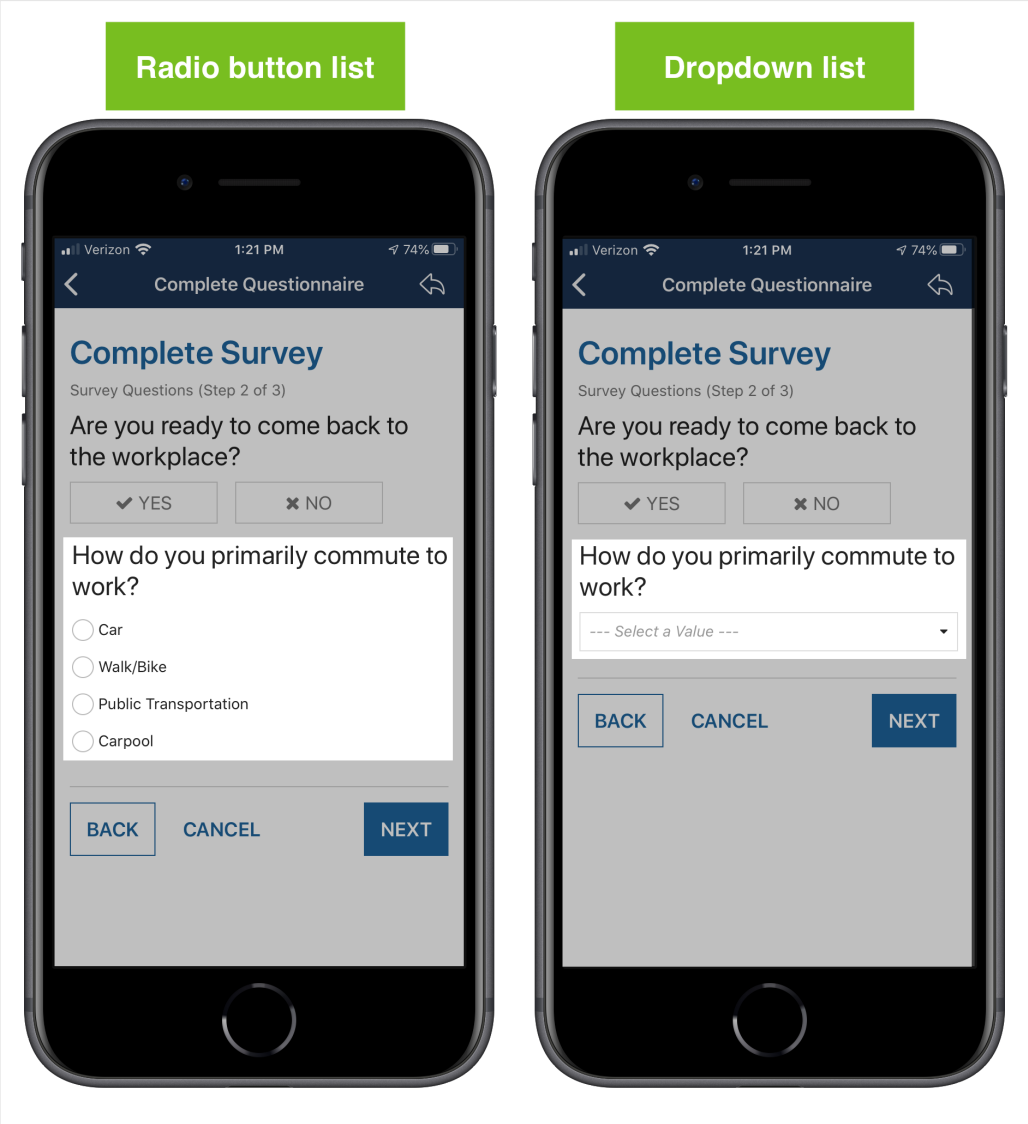



## Response types

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

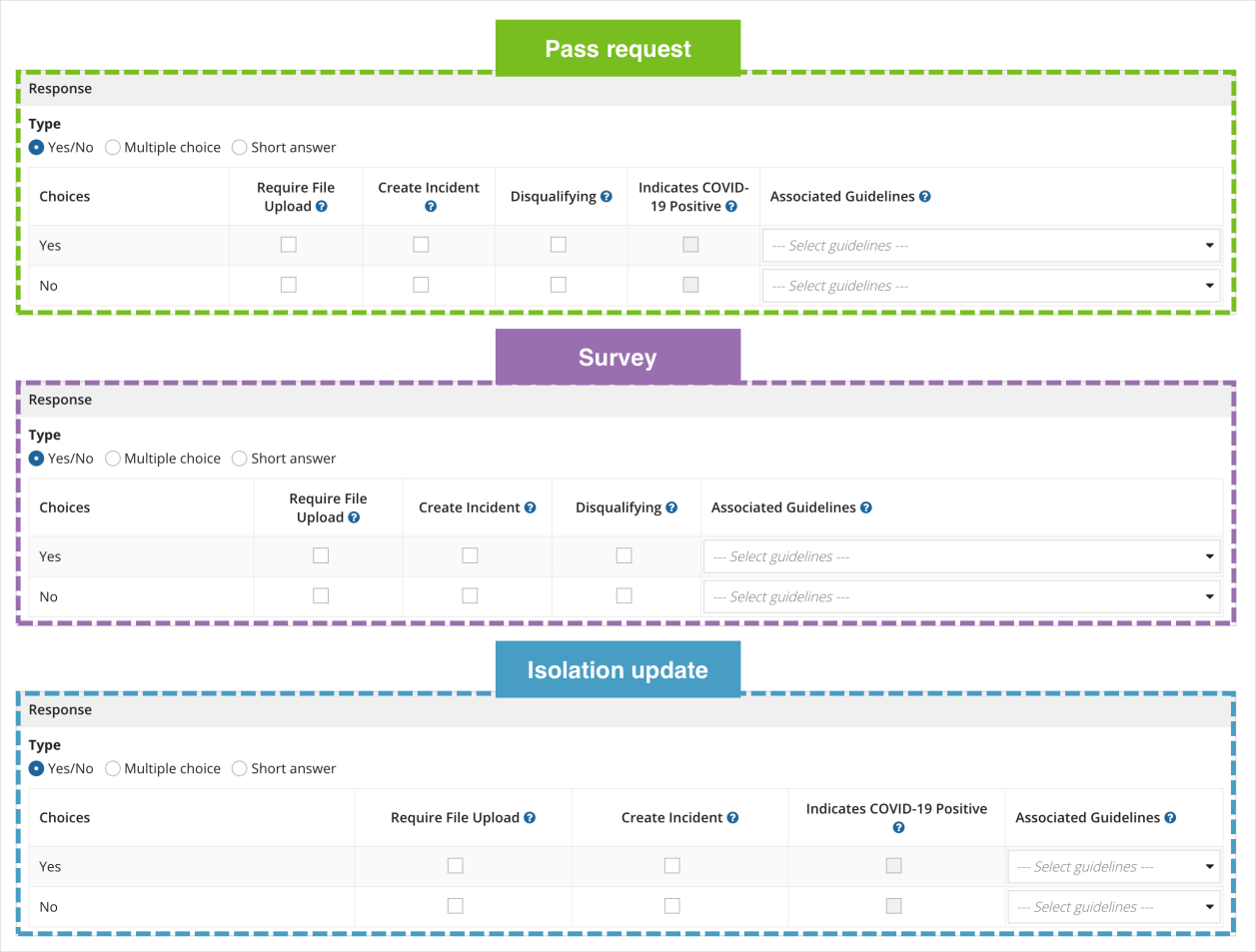
**Type**

○ Yes/No ● Multiple choice ○ Short answer

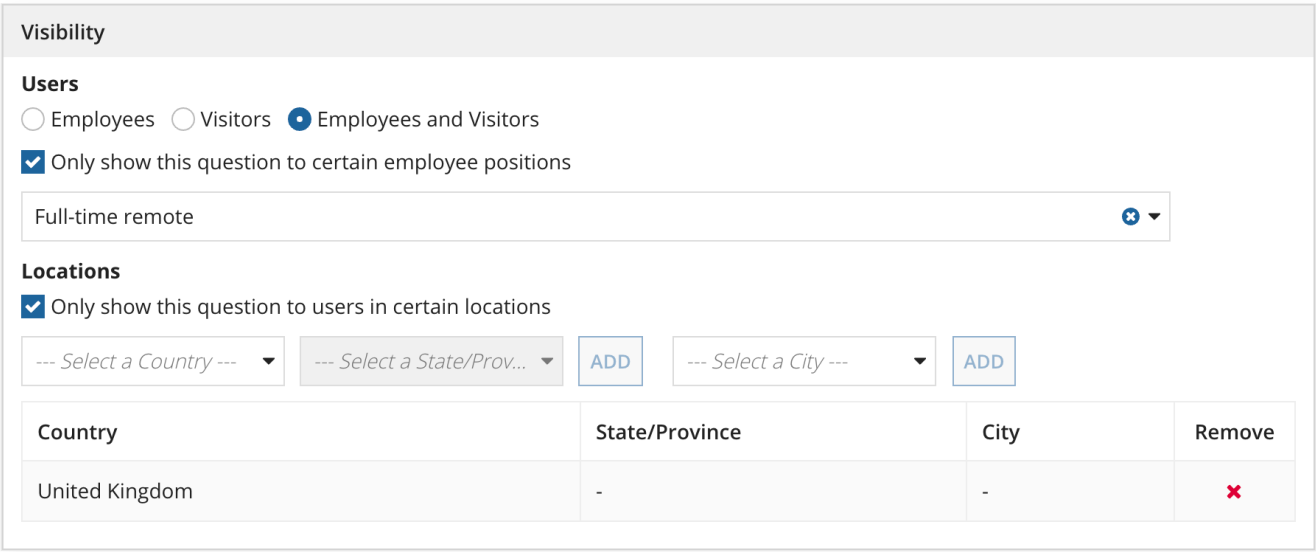
| Choices | Require File Upload | Create Incident |
|---|---|---|
| Walk | ☐ | ☐ |
| Drive | ☐ | ☐ |
| Bus | ☐ | ☐ |
| Bike | ☐ | ☐ |

⊕ 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 a COVID-19 isolation incident needs to be created.
        - **Note**: **Create Incident** and **Disqualifying** must be selected for the choice to enable **Indicates COVID-19 Positive**.
    - Choose the **Associated Guidelines** for each response choice.




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**.

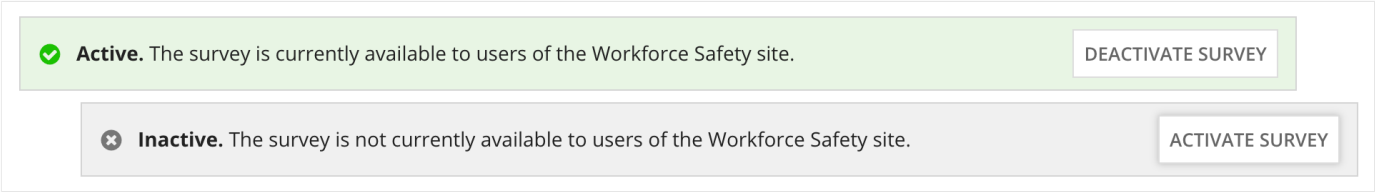
## Activating and deactivating surveys

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**.



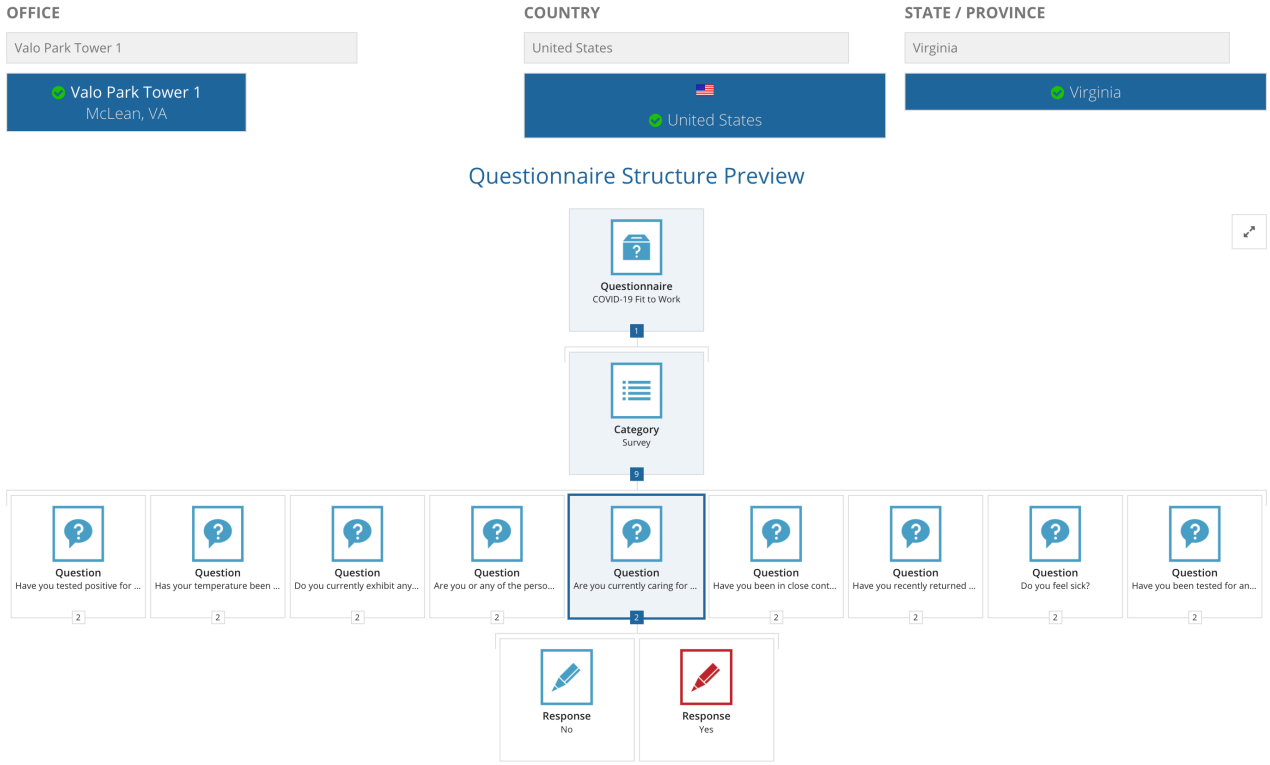

After the survey is activated the Pass Requests Disabled by Active Survey Incidents toggle displays in the Manage Site Features configuration.

## Preview pass request questionnaire structure

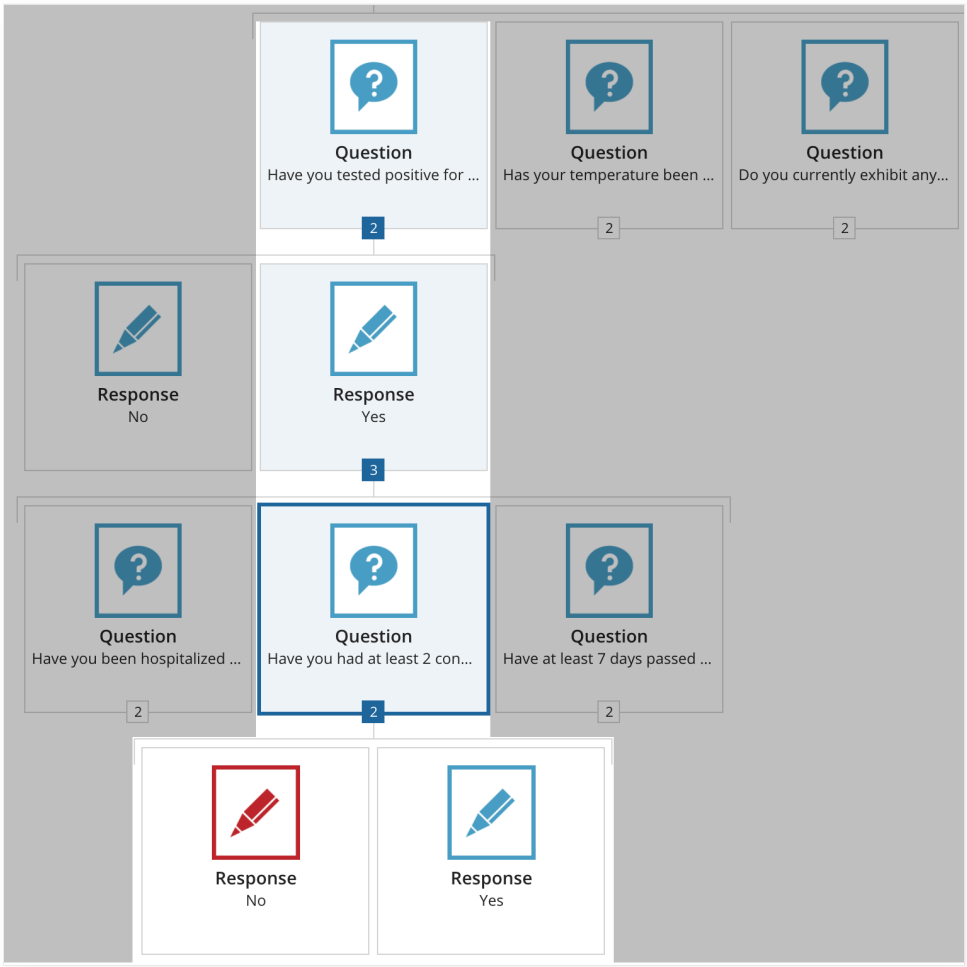
Response and configuration managers can preview the pass request structure by clicking **PREVIEW QUESTIONNAIRE**.

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.

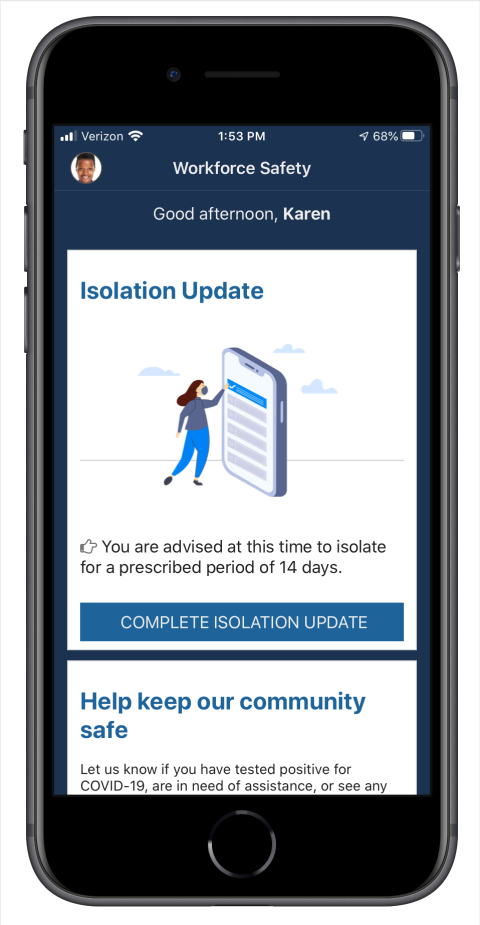



# Modifying default messages

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

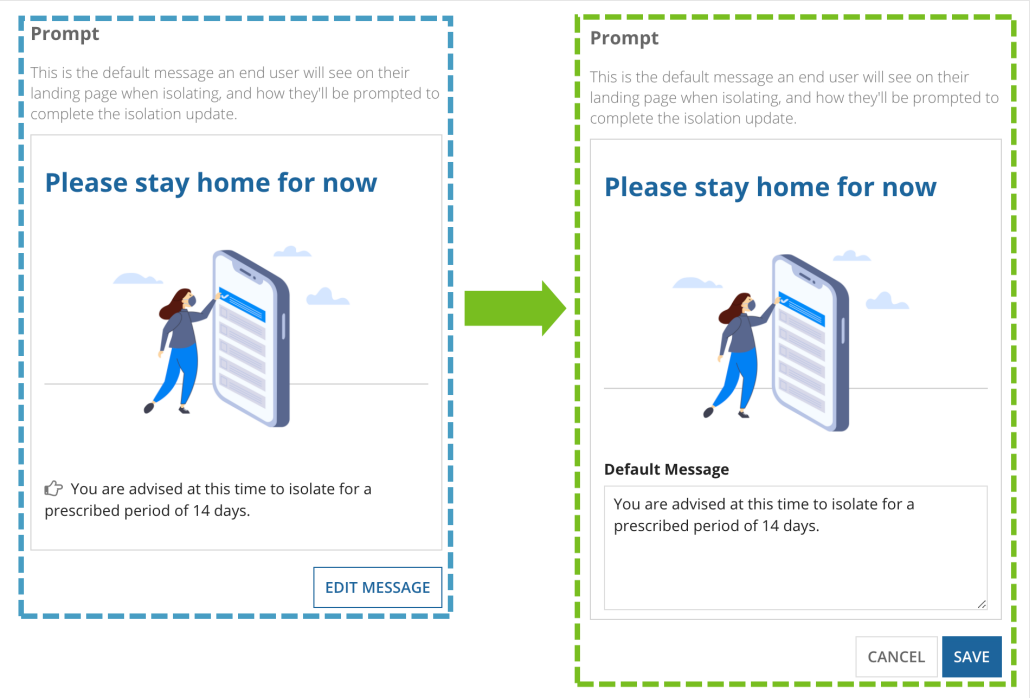
When users are placed into isolation, instead of a pass request screen on the homepage, they are asked to complete an isolation update. The default message that displays on the homepage for isolation updates is "You are advised at this time to isolate for a prescribed period of 14 days."




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.

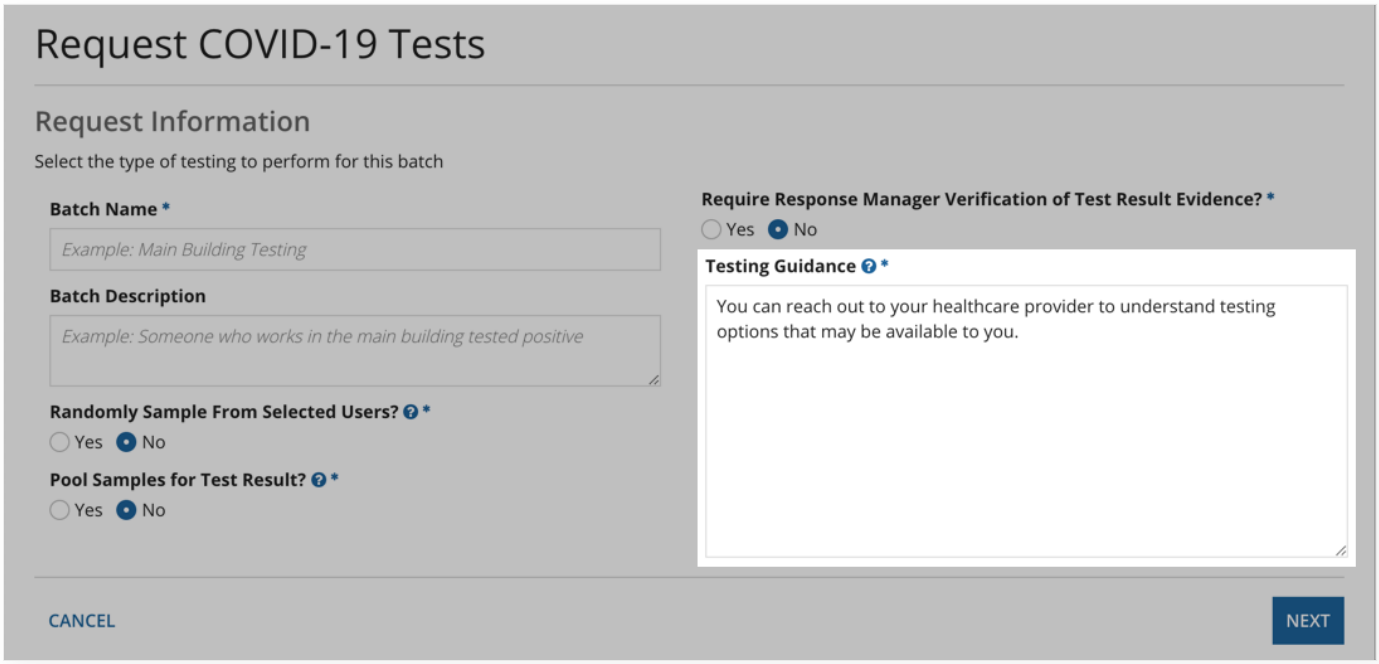
To modify the isolation update prompt:

1. From the **CONFIGURE** page, click **ISOLATION UPDATE**.
2. Click **EDIT MESSAGE** and enter your message.
3. Click **SAVE**.

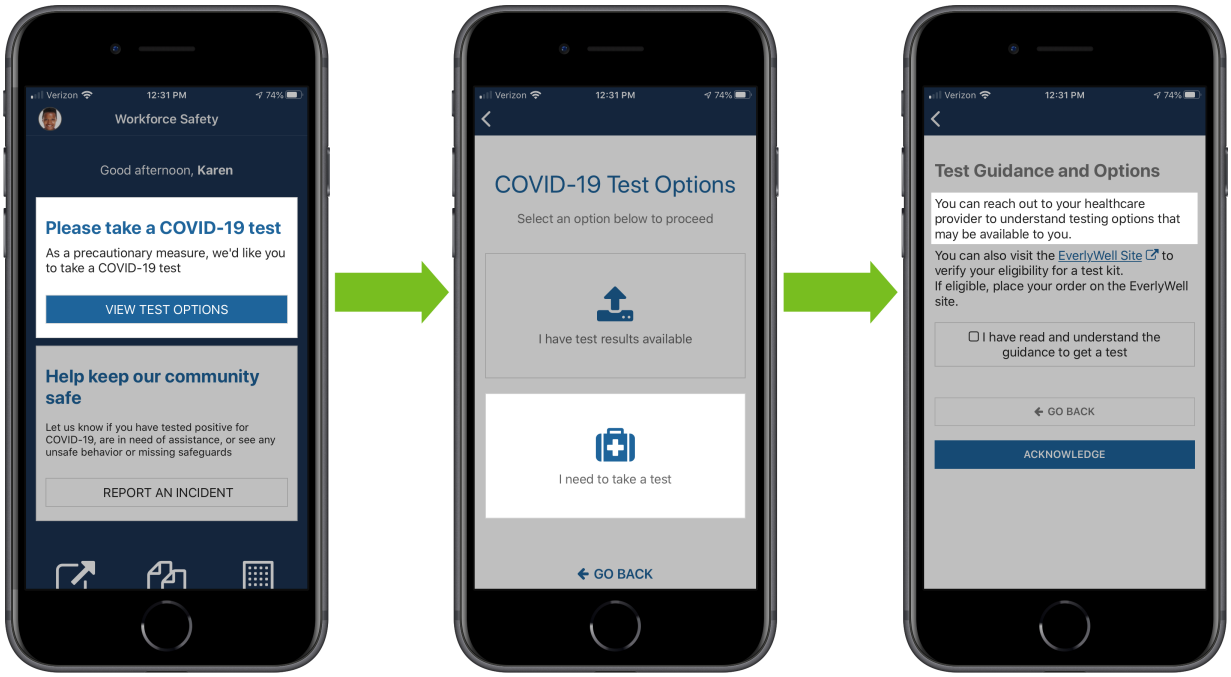


## Modifying the default message for COVID-19 testing requests

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**.



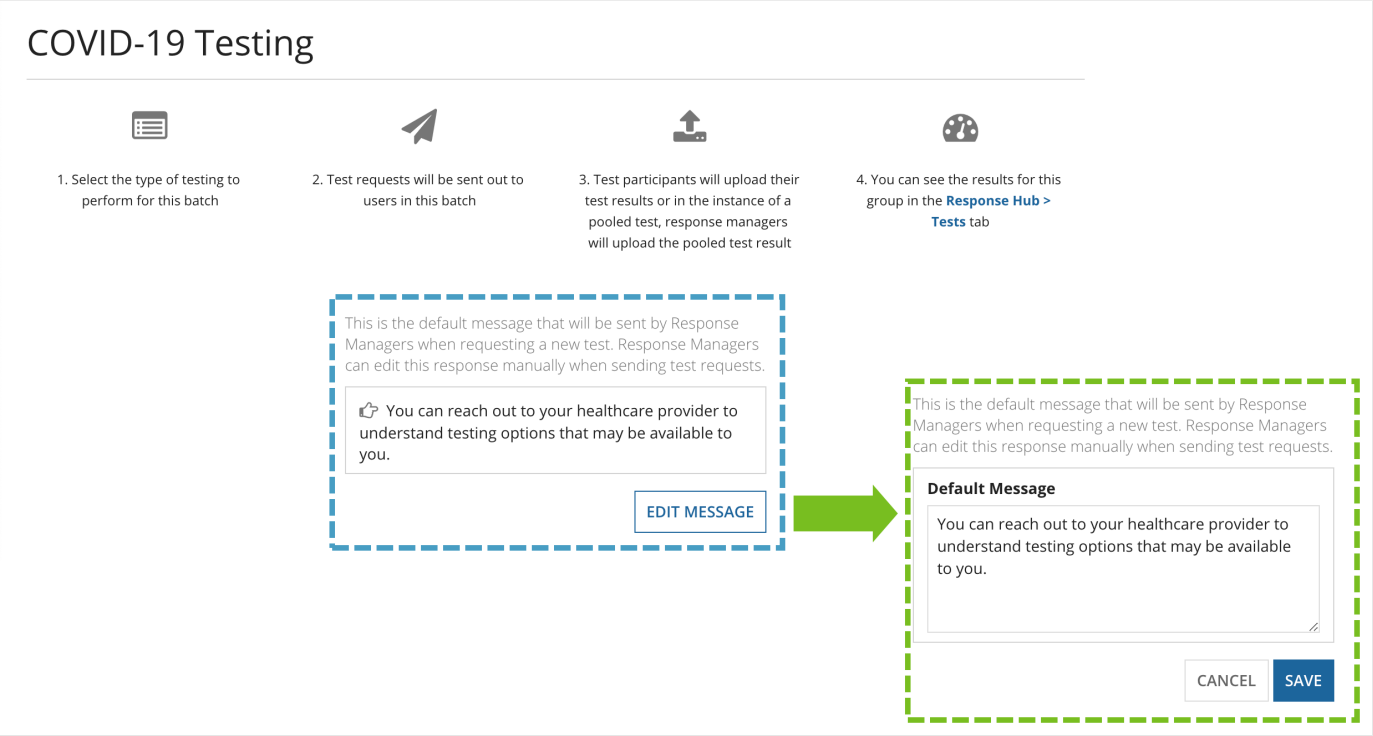

Note that this message also displays if a test request is sent automatically when Workforce Safety is configured to automatically remove users from isolation based on a negative test result.

> 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.

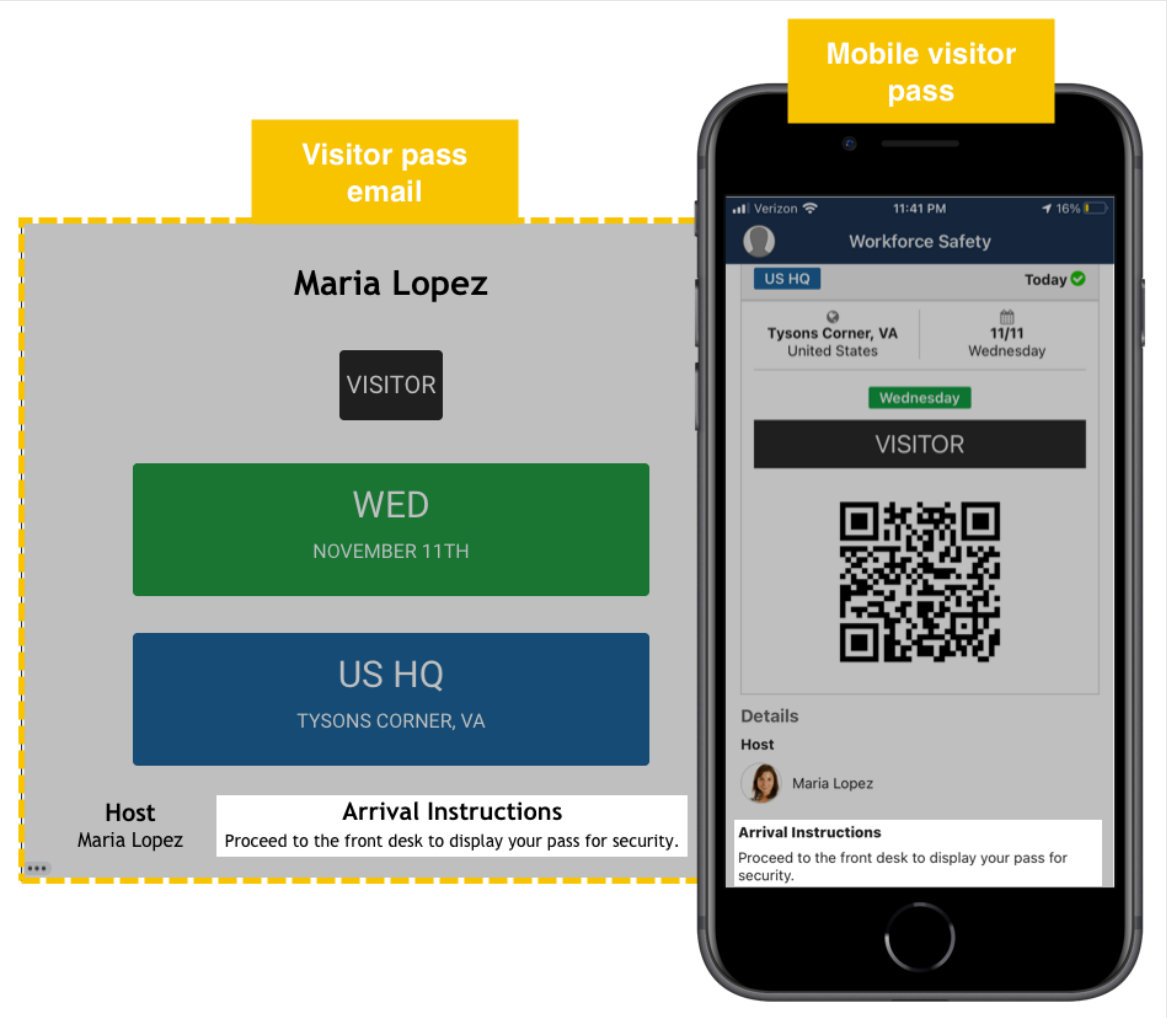
To modify the default message for COVID-19 testing requests:

1. From the **CONFIGURE** page, click **COVID-19 TESTING**.
2. Click **EDIT MESSAGE** and enter your message.
3. Click **SAVE**.



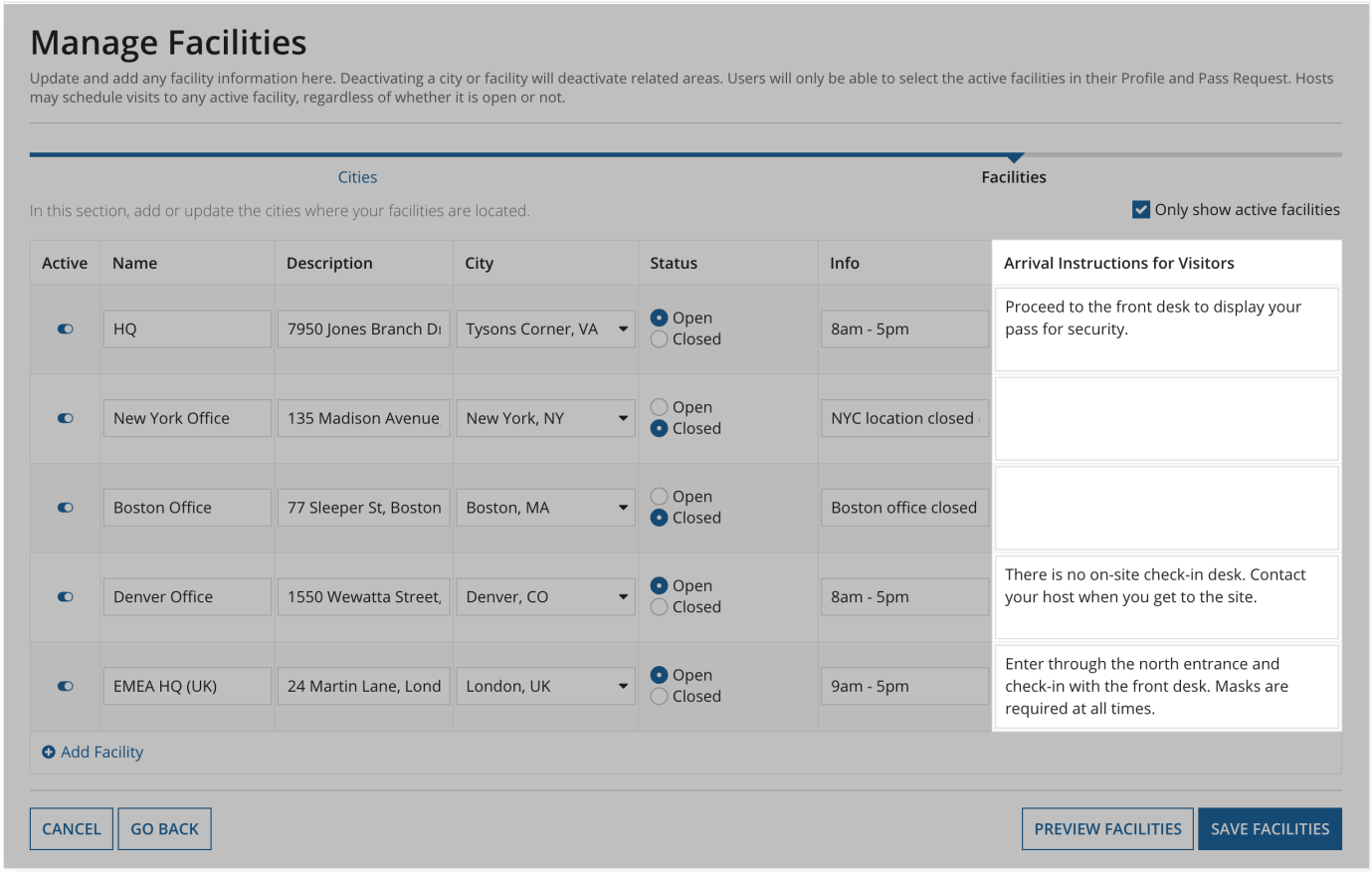

## Modifying arrival instructions for visitors

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 isolation 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.

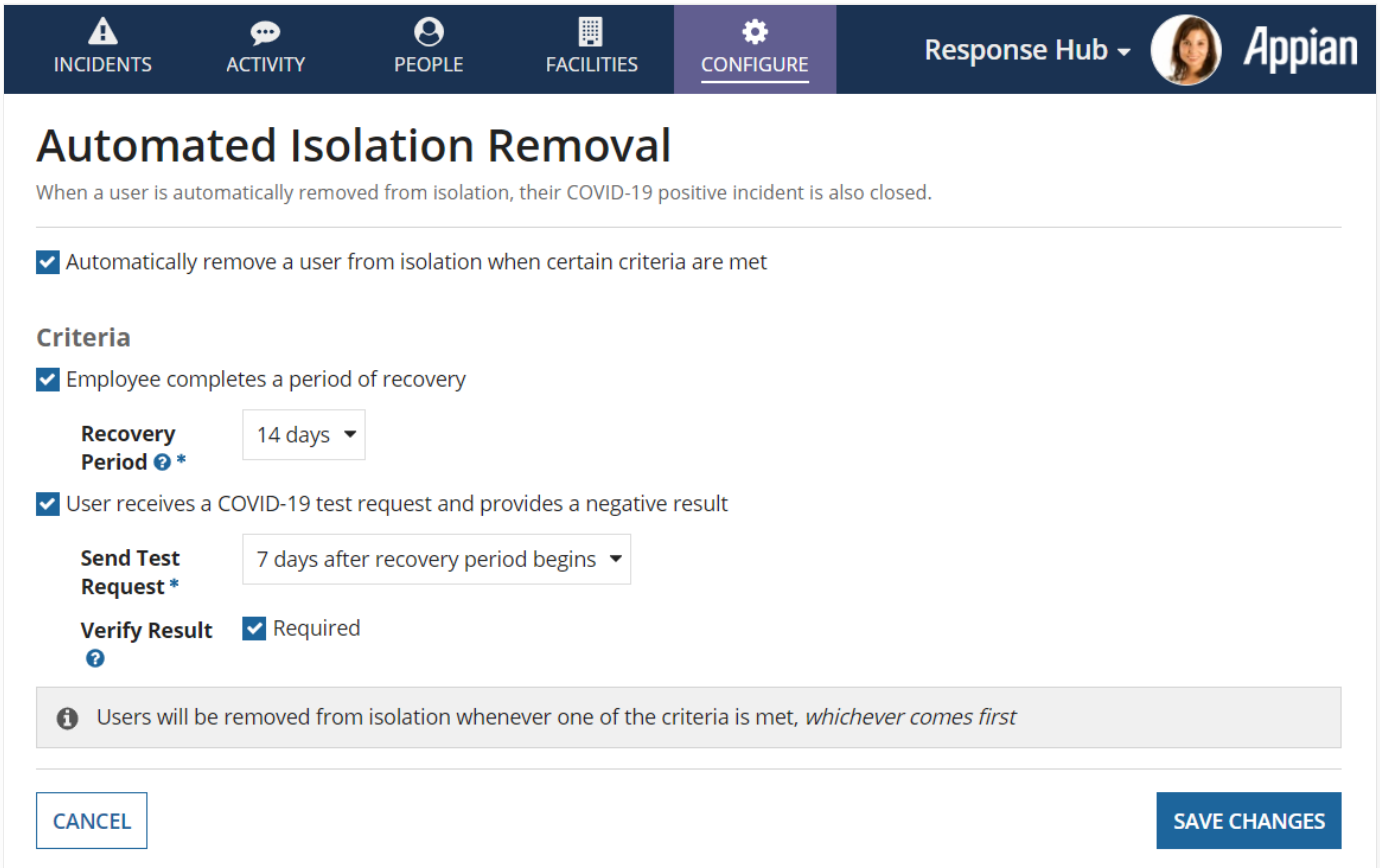
You can set up Workforce Safety to remove users from isolation automatically based on one or both of the following criteria:

- 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 isolation 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 isolation incident at a time, anytime Workforce Safety would automatically generate a COVID-19 isolation incident, the isolation countdown resets. For example, if they answer a question on the isolation update that creates a COVID-19 isolation 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.

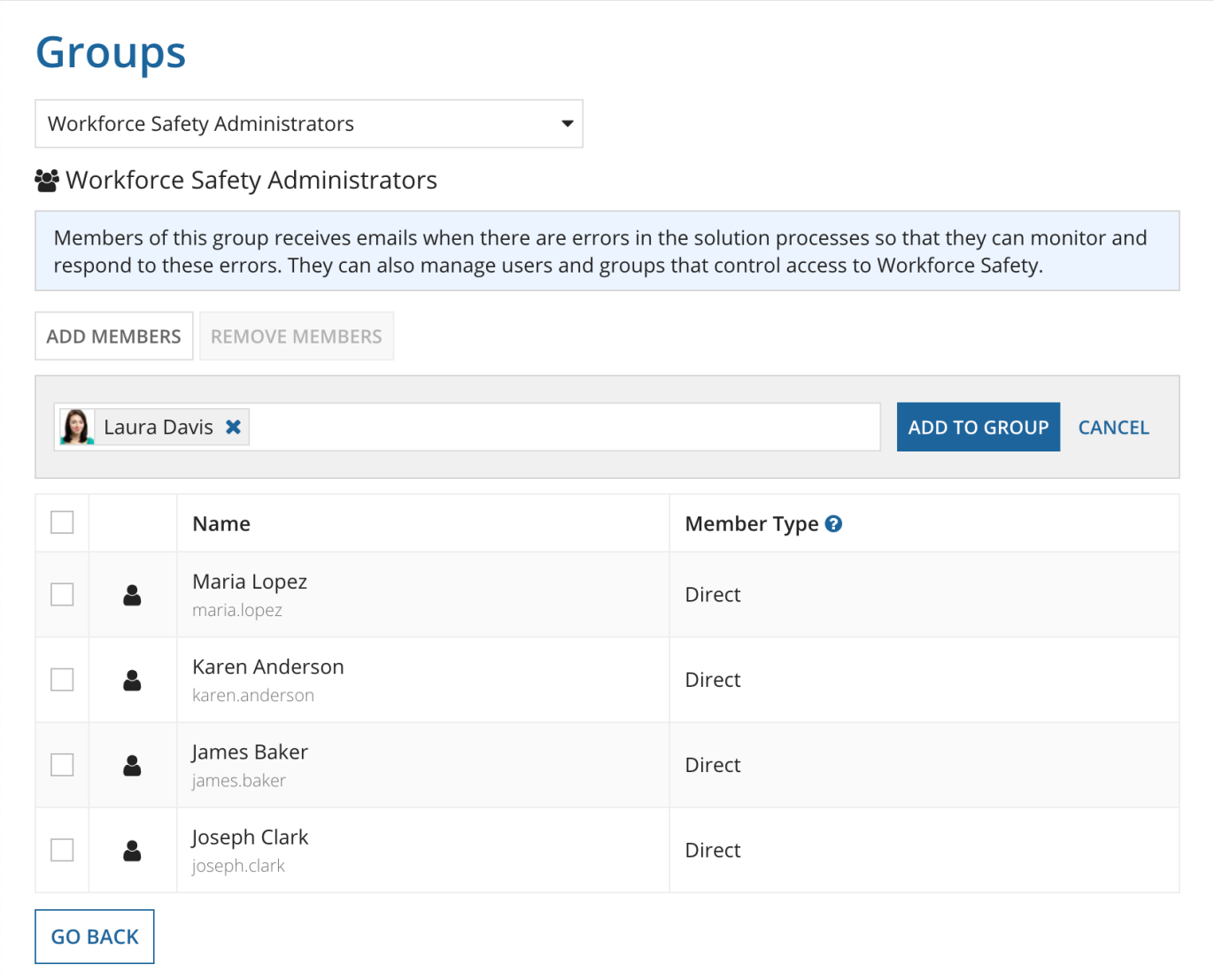
See the Groups Reference Page for more information on the information and actions that each group has access to.

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.

## Manage data archival

The longer you use Workforce Safety, the more data your organization creates. Too much data may cause end users to experience slow app performance. If certain data is no longer needed for business purposes, it is a good idea to archive it so that it doesn't affect the performance of Workforce Safety.

Archived data is no longer visible from the Workforce Safety site, but it can be retrieved in the future. This is because it isn't deleted, but moved to a different table in the database.

The Data Management configuration allows administrators to determine what data to archive and when to archive it.

See also:

- See Data archival strategy for recommendations on when to archive data.
- See Archived data for an explanation of how archived data can affect information in the Response Hub.

### Permissions to manage data archival

Only members of the `Workforce Safety Administrators` group have access to the Data Management configuration. Response Managers do not have access to this configuration unless they are a member of the administrator group.

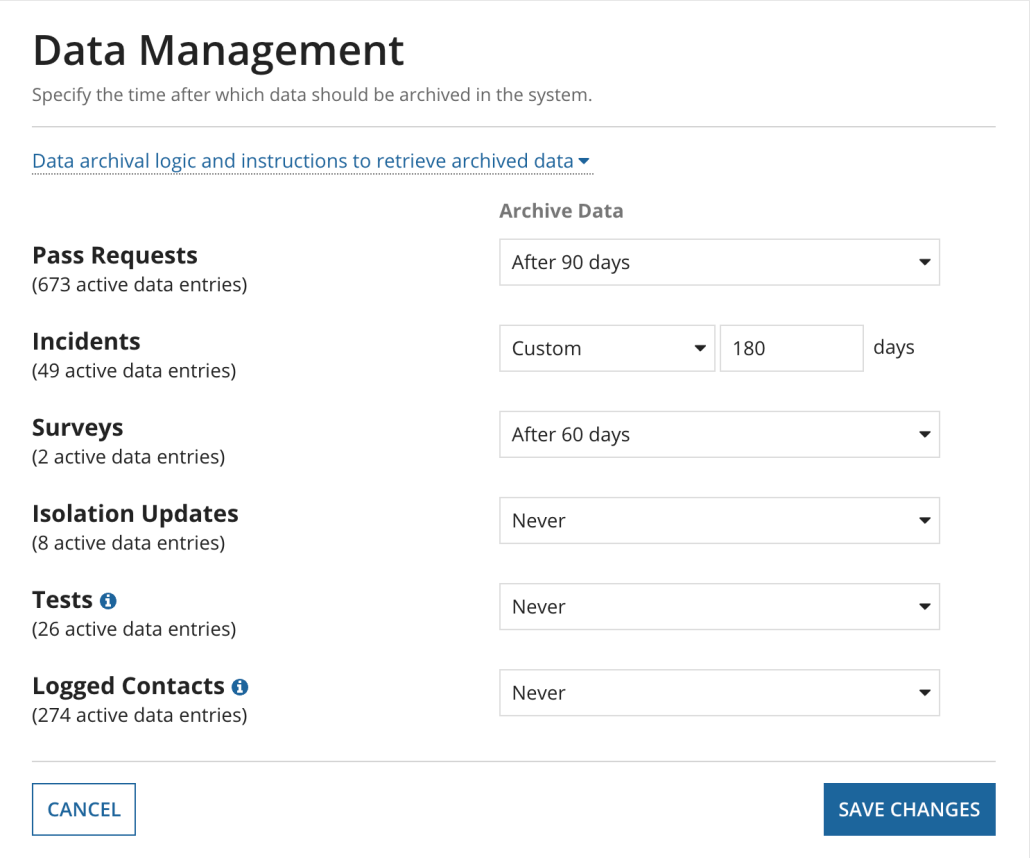
### Setting data archival time frames

You can archive the following data:

- Pass requests
- Incidents
- Surveys
- Isolation updates
- Individual and pooled tests
- People and areas that users have logged for contact tracing

To specify which data to archive and when to archive it:

1. From the **CONFIGURE** page, click **DATA MANAGEMENT**.
2. For the data you would like to archive, select when to archive it. You can enter a custom number of days by selecting **Custom** and entering the number of days.
3. Click **SAVE CHANGES**.




# 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.

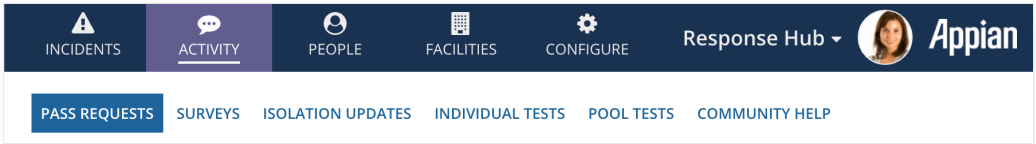
### See also

- 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 |
| **Reports page** | | | | | | |
| View reports. | | | | | | X |
| **Configuration page** | | | | | | |
| Configure data management to automatically archive data. | X | | | | | |
| View facilities from the facilities configuration page. | | X | X | X | X | X |

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

*All members of the `Workforce Safety Hosts` group can also schedule and add visitors from the Workforce Safety home page. This group automatically includes the `Workforce Safety Response Managers` and `Workforce Safety Screeners` groups.

## Syncing users to the database

Every night a process runs that updates the table in the database that stores user information to match the Workforce Safety Users group.

When users are deactivated or added to the Workforce Safety Users group, the changes might not show up in Workforce Safety right away. Instead, reports like the People page will be updated each night when this sync occurs.

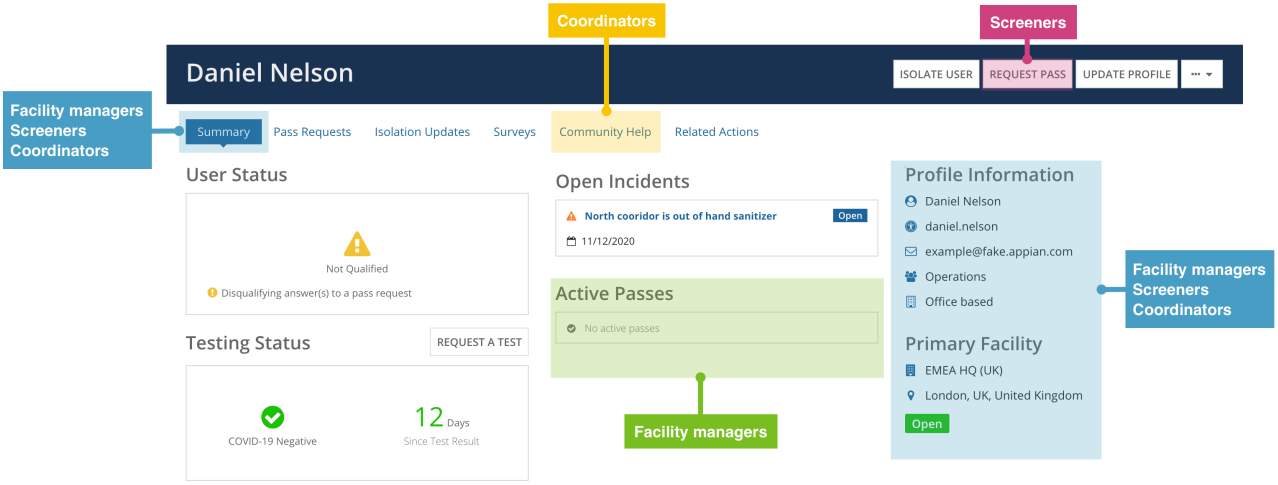
## Information and actions available to users in the user summary

Any user that has access to the Response Hub, except configuration managers, can see certain information for each user in the user's summary page. This information is displayed whenever you click on a user's name in the Response Hub.

The following image outlines which information each group has access to.

Response Managers have access to all information and actions in this view. These actions include:

- Updating user status.
- Requesting a pass on behalf of a user.
- Updating the user's profile.
- Deleting data for a user.
- Requesting a test for a user.


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