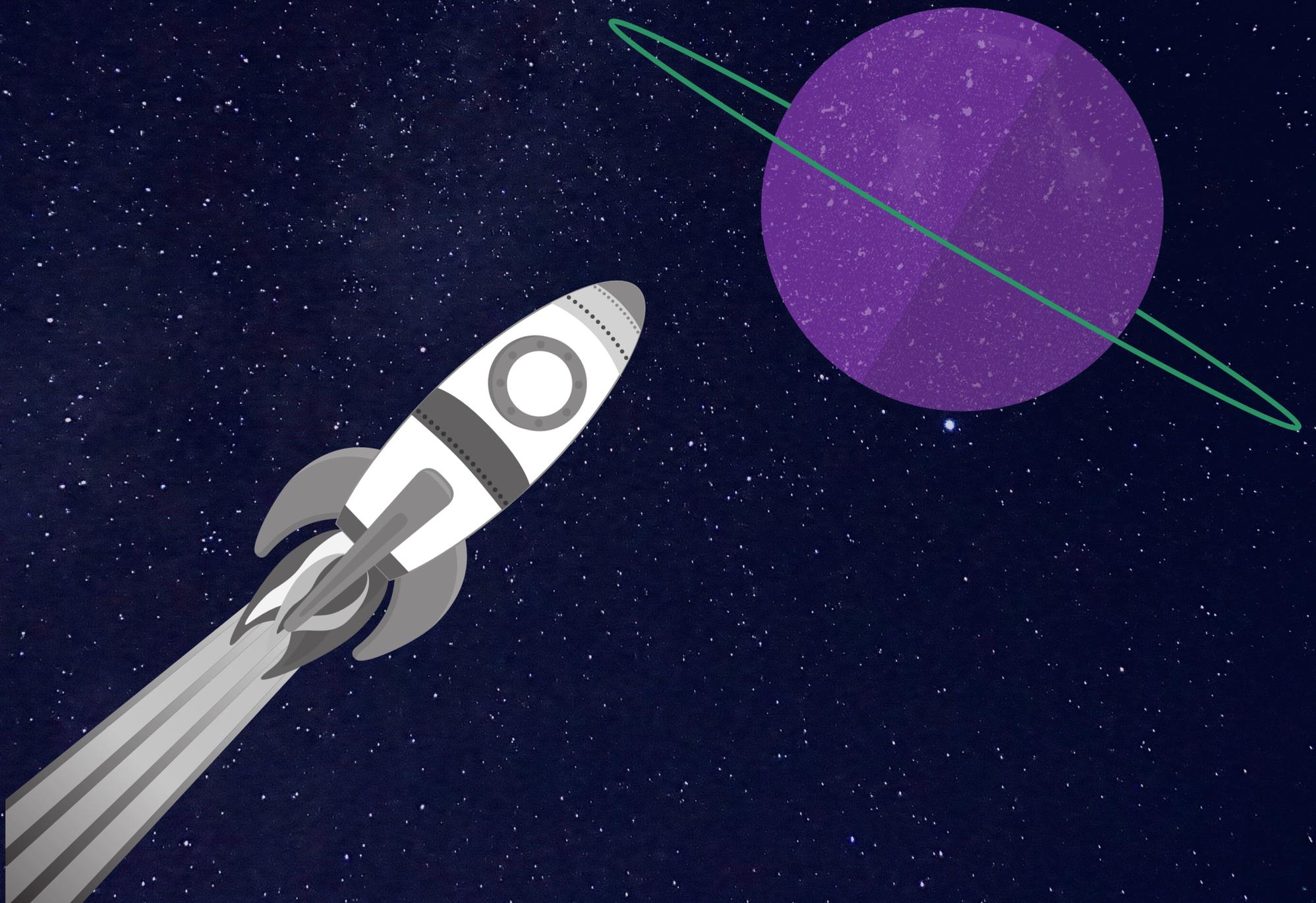


# pod

## The Ultimate Guide



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# WHAT IS POD?

**Integrated Occupational Health Platform**  
Your pilot for employee health screens.



**pod is a platform that was designed with the goal of making management and oversight of employee health screenings, testing and exams as easy as possible for employers.**

# POD SNAPSHOT

**Perfect for HR, Safety and Credentialing teams.**

Save time. Save Resources. Stay Compliant.

Place one-click service requests with your company's protocols.



It's all about your job titles and protocols. Create standardized protocols across the entire US that fit your company's needs.



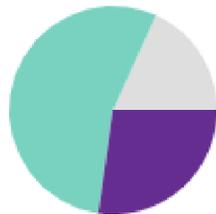
Compliance tracking for DOT, OSHA, and credentialing screenings



Never miss an annual screening, or DOT re-certification exam again. Track employees as they approach compliance deadlines.



Employee rosters, dashboards & more



View your entire employee roster. Manage titles/job descriptions, tag employees and easily track where your employees are in the exam process.



Detailed Fit for Duty statuses with WorkFit



Determine if your employees or candidates have completed all the necessary medical testing, and are declared fit in order to satisfy all of their job requirements.

# POD FEATURES

**Designed with our clients in mind**

Health screening management at rocket speed.

## DASHBOARD

Informative dashboard that gives your team complete insight. See all your service requests at a glance, so you're never out of the loop.

## EMPLOYEE PROFILES

Employee profiles with complete exam history. Review previous and current exam requests for each of your employees.

## COMPLIANCE TRACKER

Compliance tracking for upcoming employee medical requirements. Monitor which of your employees have upcoming exam re-certifications.

## WORKFIT

WorkFit statuses makes it easy for employers to determine if their employees or candidates have completed all the necessary medical testing to satisfy their job requirements.

## SERVICE REQUESTS

Request the services you need for your employees or candidates. Any exam or health screening, anywhere in the U.S, (inc. Hawaii, and Alaska & Puerto Rico).

## STATUS REPORTS

Get an exportable report of all service requests within the specified date range selected.

# POD FEATURES

**Designed with our clients in mind**

Health screening management at rocket speed.

## CUSTOM FIELDS

Create custom fields to record useful information about your employees and candidates. (e.g. employee ID's, facilities)

## EMPLOYEE ROSTER

The employee roster feature allows you to view a list of all of employees that are currently active within pod. All roster data is exportable.

## LIVE SERVICE DETAILS

Live service details for all your service requests. Know where your employees or candidates are at any time during the screening cycle.

## EMPLOYEE TAGS

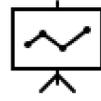
Create custom employee tags to categorize an employee or candidate within your organization. e.g. Skills, Certifications, Expertise.

## ADVANCED SEARCH

Use employee and company specific information to search for employees or candidates through your pod roster.

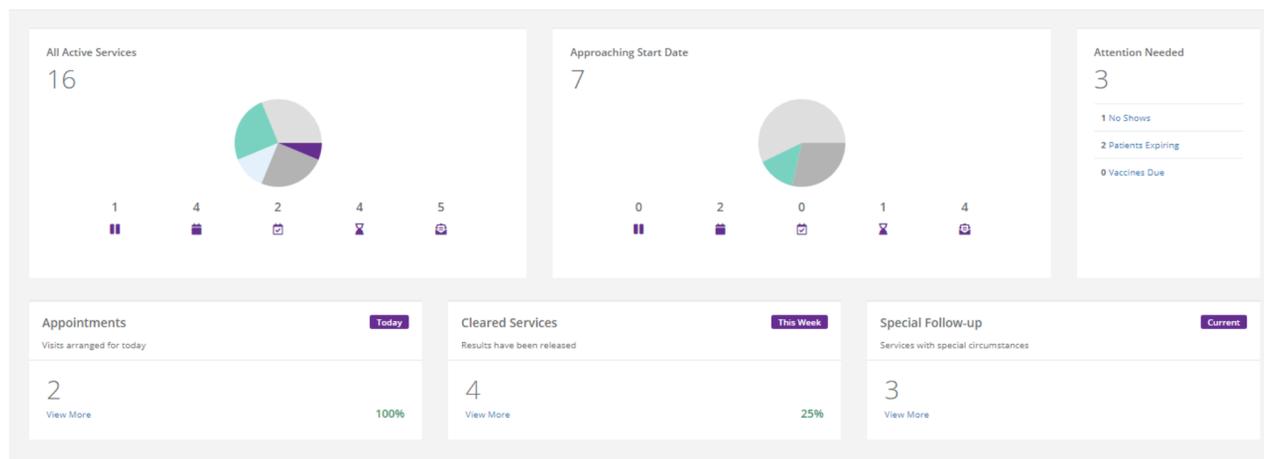
## USER MANAGEMENT

Administrators can grant or deny access to each feature for any pod user within the company.



## Navigating the Dashboard

pod's informative dashboard was created to give your team complete insight into all of your service requests!



### Appointments

View the number of appointments that are scheduled for that specific calendar day. If the appointment is not scheduled for that calendar day, you can find the service under active services. Click the [view more](#) button to get a more detailed view on each employee that is scheduled for upcoming services to be completed.



### Cleared Services

See how many of your employees services have been reviewed, and finalized by our medical admin staff at NMS Health. Check the cleared services tabs to see your employees results. Click the [view more](#) button, and you will get a detailed view on each employee and the services that were completed.



### Special Follow Up

Check which services require additional attention and review based on exam results. Some examples of services that fall into this follow up category could be; an employee that is in MRO review, low titer results, or a positive TB test. Click the [view more](#) button to see what specific service requires attention.

## Active Services

	Service Date	Last Name	First Name	Protocol	Start Date	Requested On	Company	% Compl
	9/2/2019	Meyers	Esther	Facility Healthcare Screening	9/30/2019		Daisy Corp	
	9/9/2019	Yurieva	Isabella	ADHOC PROTOCOL	10/13/2019		Daisy Corp	
	9/11/2019	Chen	Hui	Facility Healthcare Screening	9/30/2019		Daisy Corp	
	9/16/2019	Dresner	Marcel	Pre-Employment Drug Screen	10/7/2019		Daisy Corp	
	9/23/2019	Almasi	Kaseem	Pre-Placement Exam	10/7/2019		Daisy Corp	

### Check on your employees screening statuses in real time

The active services section on the dashboard show you all of your current open, and active service requests. In the active services view, your team gets insight into the employees scheduled service date, the protocol they are receiving, their official scheduled start date, when the service was requested, the company name they were requested under, and the percentage and/or stage that the employee is currently at in their screening process.

For a more detailed and broken down view of all service information for a specific employee, you can click on the binoculars to the left of the service date. Once you click on these binoculars, you will be fast tracked to the service info tab which is within your employee roster.



### Navigating Employee Profiles

**The employee profile section in pod gives you an in depth look into your employees health screening process, unique data, uploaded documents, and certifications.**

**Zara Dulin**  
Daisy Corp  
(614) 766-9657  
zara.dublin@daisycorp.com  
[View/Edit All Employee Info](#)

**Zara's Compliance Info**

Start Date	5/13/2019
Earliest Compliance Due	9/30/2019

**About Zara**  
Add a note to Zara's Profile

**Quick Actions**

- [Create new Request](#)
- [Get Update from Client Services](#)
- [Download Clearance](#)
- [Chat with Client Services - \(Coming Soon\)](#)

**ADHOC PROTOCOL**  
4/30/2019 10:00 AM

Academic Healthcare  
NY Inst. Of Tech. Campus  
Old Westbury, NY 11568

**Pass**  
Complete

**Overall Activity**

- ADHOC PROTOCOL 9/16/2019 @ 2:38 PM  
Complete
- ADHOC PROTOCOL 9/16/2019 @ 2:38 PM  
Results were reviewed and communicated
- ADHOC PROTOCOL 9/16/2019 @ 2:37 PM  
Results were verified and confirmed.

**Find the employee you want to update in the top search bar, or in the employee roster.**

To edit and/or add the employees required information in pod, such as date of birth and start date, you would select the standard fields tab under edit employee.



Standard Fields | Custom Fields | Documents

Address:  
2082 Collins Avenue

City:  
Dublin

State:  
Ohio

Zip Code:



Edit Employee

Zara Dulin

Use the form below to edit this employee's information:

Standard Fields | Custom Fields | Documents

Employee ID #  
5654376

Location \*  
Please Select  
Chicago  
Florida  
New Jersey  
New York

To upload important work documents and/or certificates that the employee has acquired, you would select the documents tab under edit employee.



Standard Fields | Custom Fields | Documents

Friendly Name:

Select File:  
Choose File | No file chosen

[Upload](#)

File Name - Scroll down for more

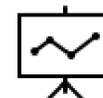
Documents have not been uploaded for this employee



To edit and/or add specific company related data to the employees profile, you would select the custom fields tab under edit employee. It is important to note that required fields indicated with an \* must be completed in order to save any of the updates you have made.



**Your employees information will be organized, precise, and easily adaptable with pod!**



# Navigating Service Details

The service info tool gives you a full breakdown of your employees exam timeline & all active workflows.

Isabella Yurieva Other Services for Isabella

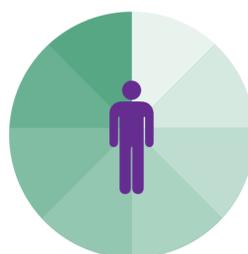
<p><b>Service Status:</b> <span style="background-color: #666; color: white; padding: 2px;">Upcoming Visit</span></p> <p><b>Service Date:</b> 9/26/2019</p> <p><b>Protocol:</b> Pre-Employment Drug Screen</p> <p><b>Performed Procedures:</b> 0/2</p> <p><b>Procedures Results:</b> 0/2</p> <p><b>Facility:</b> Academic Healthcare Old Westbury, NY</p> <p><b>Completed:</b> <div style="width: 50%; height: 10px; background: linear-gradient(to right, #666, #ccc);"></div></p>	<p><b>Disclosure Date:</b></p> <p><b>Last Updated:</b> 9/23/2019@6:10 PM</p> <p><b>Last Updated By:</b> Jackie Rose</p>
---	---

Awaiting Reg.
To Be Scheduled
Upcoming Visit
Pending Results
In Review

### Service Activity

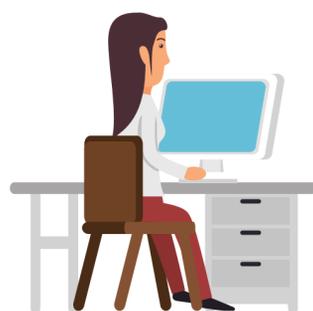
- Pre-Employment Drug Screen 9/23/2019 @ 6:10 PM  
Employee was scheduled
- Pre-Employment Drug Screen 9/23/2019 @ 6:10 PM  
Employee Provided Availability
- Pre-Employment Drug Screen 9/23/2019 @ 6:08 PM  
NMS Initiated Contact
- Pre-Employment Drug Screen 9/23/2019 @ 6:08 PM  
A request was submitted to NMS

Track your employees journey through the entire health screening process



- View the employees' screening status & when/where the exam is taking place
- See how many of the procedures have been performed
- Get live updates on where they are in the screening process

Employers can see any of the comments our staff leaves about a specific employee. These comments can be found in the service info section...

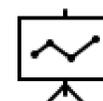


### Comments from the NMS Staff

.jaclyn.ribaudo Isabella requested a to go to labcorp for her drug test  
09.24.2019 @ 3:22 PM

Our staff and customer service team will leave comments they feel are pertinent for the employer to know about their employees screening process...





## Navigating the Employee Roster

With our employee roster feature, you are able to see a list of all of employees' that are currently active within pod!

Active Roster		Inactive Roster						
Active	Last Name	First Name	Date of Birth	Start Date	Email Address	Phone Number	Company	
	Azuma	Kazuo	5/6/1994	11/25/2019	kazuo.azuma@daisycorp.com	(305) 881-3199	Daisy Corp	
	Barajas	Favian		9/14/2020	favian.barajas@daisycorp.com	(989) 322-4881	Daisy Corp	
	Bieber	Paul	5/16/1984	7/8/2019	paul.bieber@daisycorp.com		Daisy Corp	



The green wheel icon allows you to select between two options...  
**New Request:** This will take you to the requests page and allows you to create a new service request for a specific employee.  
**Edit Employee:** This will open up a field that allows you to edit any employee information, or upload any of their documentation.

The glasses icon allows you to quickly get re-directed to that specific employees profile page. Once you are at the employee profile page you will get a detailed view on the employees service status, their unique tags, what clinic their screenings are taking place at, and much more!

The stethoscope icon allows you to quickly view into the service details page for a specific employee. If the employee has multiple services, you can select on the specific service that you would like to view. The service details page provides a more in depth view of a service ordered.

The purple check mark icon indicates that the employee is currently still active within pod. You can click on the purple check mark at any time to mark the employee as inactive. Once you click on the check mark the employee will populate on the right of the screen, and once you click submit to deactivate them, they will now filter into the inactive roster.

## Export Roster Tool

Your full employee roster is easily accessible and downloadable...

[Export Roster](#)  
[View Download](#)

In the employee roster section you have an option to export and download your full roster. Once you click the export roster button at the top of the page, it will immediately begin to export your data into an excel file. Once this file is opened, you will find all of your employees information now conveniently organized for you. In this export you will find helpful information such as when initial contacts were made with the employee, their start date, and much more.

Create custom fields that will appear in your exported excel spreadsheet...

Do you have specific company data that helps you organize your employees that you want to include in your exported roster? You have the ability to manage your custom fields, so this data can be easily added! You can add up to two more custom fields. Some examples of our clients custom fields include employee ID numbers, or company branch locations.



# Service Requests

Request the screenings you need for your employees and candidates!  
Any exam or health screening. Anywhere in the US.

- Select company name →
- Select if you would like rush scheduling for this request →
- Select which protocol (set of pre-determined services) →
- Add on any additional services on top of the protocol →



Service Information
Required

**Company:**

**Rush Scheduling:**  
 Rush Schedule this Request (5 Remaining for the month)

**Protocol:**

[What Screenings am I Ordering?](#)

**Individual Procedures (if needed):**

- Drug Screen - Urine - 14 Panel
- Drug Screen - Urine - 5 Panel
- Drug Screen - Urine - 8 Panel
- Drug Screen - Urine - 9 Panel + I
- Drug Screen - Urine - DOT Regu
- Drug Screening - Urine - ANSI +
- Drug Screening - Urine - ANSI St
- Electrocardiogram
- Female PAP
- Hemocult Slides
- Hepatitis A Antibody

[Add Selected](#)

**Selected Procedures:**

- Flu Vaccine

[Remove Selected](#)

Shows you what services are within the protocol you are ordering

- Pre-Placement Exam

  - Audiogram
  - CBC + Chem Screen + UA
  - Drug Screen - Urine - 10 Panel
  - Physical Exam
  - Vision Screening - Titmus Test

Shows you any additional selected services

Custom Employee Fields

Employee ID # \*

Location \*

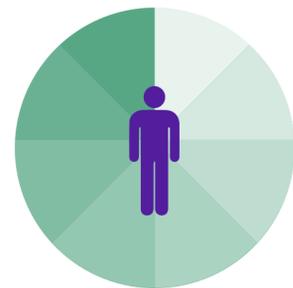
Department \*

Departure \*

Job Title \*

## Custom Fields & Service Requests

- ← Input employee specific information that was created by your company
- ← An \* indicates that this information is required. The request will not be submitted until this field is inputted.





## Feature Guide



# Navigating the Compliance Tracker

Never miss a compliance due date again with pod's compliance tracking tool! See which employees are currently in compliance, approaching expiration, or are expired and no longer in compliance.

●	11/19/2019	Leonard	Tosha	11/19/2018	QuantiFERON Testing	Pass	Daisy Corp
●	12/16/2019	Bandera	Lilly	12/16/2018	Annual Exam	Pass	Daisy Corp
●	12/17/2019	Marburger	Andrew	12/17/2018	QuantiFERON Testing	Pass	Daisy Corp
●	1/14/2020	Bedan	Arthur	1/14/2019	Annual Exam	Pass	Daisy Corp
●	2/18/2020	Melendez	Christina	2/18/2019	Annual Exam	Pass	Daisy Corp
●	11/6/2020	Dulin	Zara	11/7/2019	QuantiFERON Testing	Pass	Daisy Corp
●	11/11/2020	Pisani	Arabella	11/12/2019	QuantiFERON Testing	Pass	Daisy Corp
●	11/17/2020	Chen	Hui	11/18/2019	QuantiFERON Testing	Pass	Daisy Corp

## Tracking Icons



The green dot indicates that the employee is currently in compliance. This means the employees is up to date with their mandatory compliance services. The compliance tracker will differ for each employee based on when the expiration date is on their profile.



The amber dot indicates that the employees compliance is about to expire. This means that they have a compliance service that needs to be renewed. Now would be a good time to get them scheduled for the necessary screening(s). Once their services are completed and the employee is medically cleared, this amber dot will turn back to green.



The red dot indicates that the employee is currently out of compliance. This employee should be scheduled immediately for all necessary compliance screenings. Once their services are completed and the employee is medically cleared, this red dot will turn back to green.

## Creating New Requests

Tosha's QuantiFERON test has expired. To become compliant again, she needs to go for a new QuantiFERON test.



Click the new request icon to order the service that is required for the employee to become compliant again.

When you are taken to the new request page, fill out all required information. Your employee is now one step closer to being medically cleared and fully compliant once again.



# Navigating WorkFit

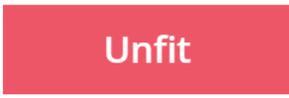
## "One Status to Rule Them All"

WorkFit will simply tell you if your employee or candidate has completed all the medical screenings necessary to satisfy a Fit for Duty status.

### WorkFit Statuses



The employee or candidate is medically able to perform their required job duties and currently requires no further attention.



The employee or candidate is medically unable to perform their required job duties. In most cases, this status is temporary and requires the person to follow-up with their own personal physician to obtain a clearance or note.



The employee is outside the WorkFit compliance period and requires a new exam. This expired status can change once a new request is created, and the employee completes the screening that satisfies the compliance requirements.

Review a detailed snapshot of the medical screenings required to satisfy your employee or candidate's WorkFit status.



Medical screenings required to satisfy WorkFit status →

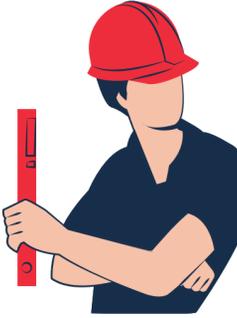


WorkFit™ Details

**Fit**  
Expires: 10/5/2019

● Annual Exam	10/5/2019
● Drug Screening - 10 Panel	10/5/2019

WorkFit Status as of: 9/26/2019 Dates Indicate Expiration

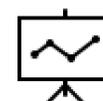


← Compliance expiration dates for each medical screening

A pending status means that the employee or candidate is currently going through the screening process.



Therefore, a WorkFit status has not yet been assigned.



## Navigating Custom Fields

Creating custom fields in pod allows you to organize and track data that is specific to your company!



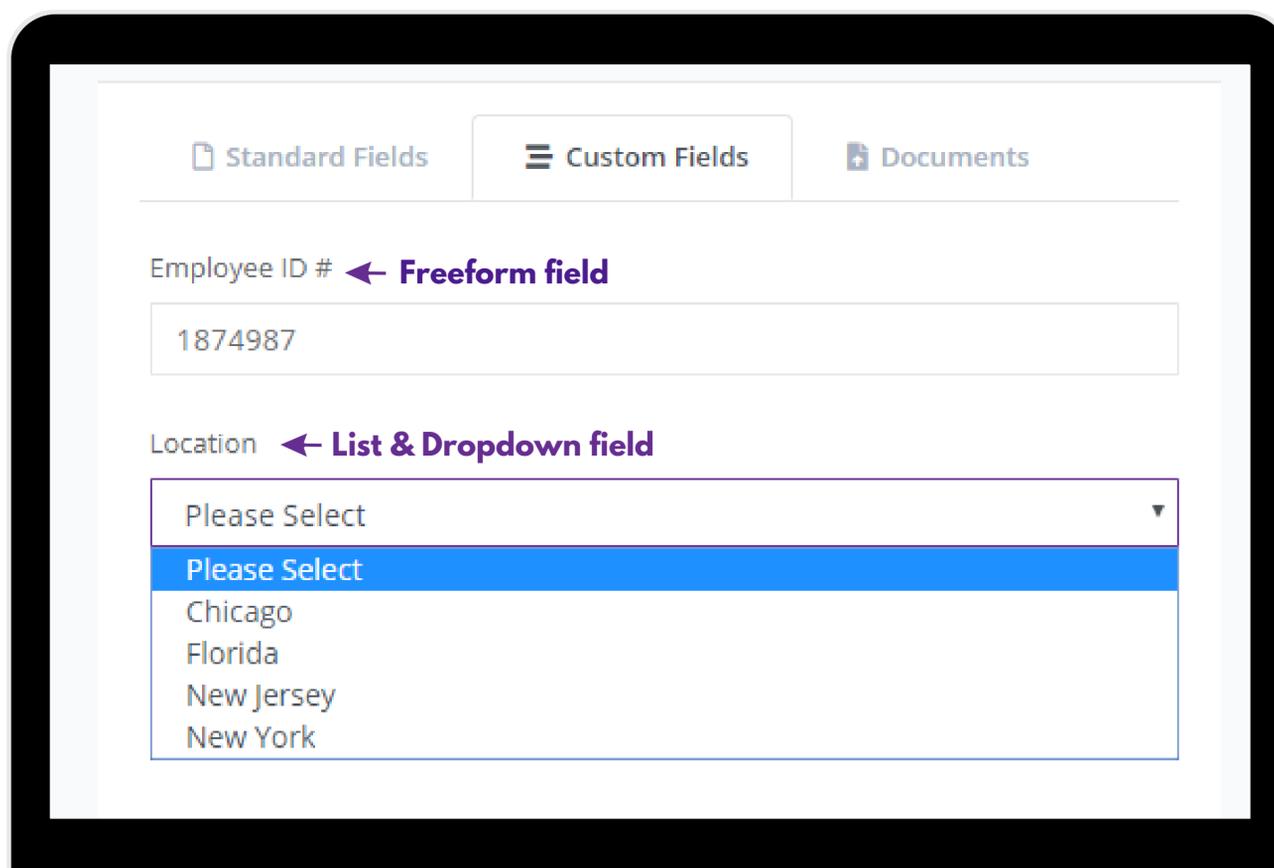
### Freeform fields

Creating freeform fields allow you to customize your data in a way that is the most beneficial and useful for your company. A freeform field allows you to organize your employees by unique data points. There are three field type options to choose from when creating a custom field. These three options are date, text, or numbers. Each freeform field allows you to input one value only, per employee.

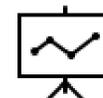


### Lists and Dropdowns

Creating lists & dropdowns allow you to customize and organize your unique data containing multiple data points. When creating a dropdown list, you are able to easily select which data point your employee specifically falls under. If you need to select multiple values for an employee, you can choose 'multi-select' which allows you to select multiple data points for that specific employee. Lists & dropdowns allow you to standardize a list of values that can be used over and over, e.g. department titles, managers, project locations, etc...

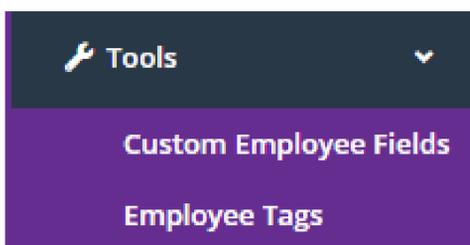


Custom fields can be added to your request page, automatically added to your employees profiles, and are available in your exported excel spreadsheets.



## Creating Freeform Fields

Customize and Organize Unique Data Points for your Company by Creating Freeform Fields!



Select Tools → Custom Employee Fields



Freeform Fields

### Manage Your Freeform Fields

Freeform Fields can be used to store unique information or data about your employees.

Examples: *Employee Id Number, Work Phone Number, End of Contract, etc.*

Available Field Types: Text, Number, Date.

Add an unlimited number of fields to your employee's profile

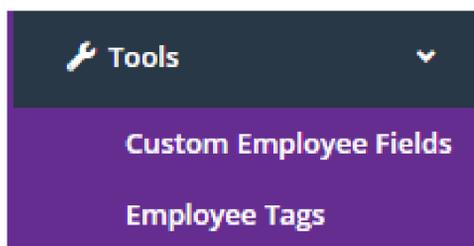
Add New

Field Information	Required
Field Name: <b>EX: Employee ID, Work Phone #, End of Contract</b>	
<input type="text"/>	
Field Type: <b>Date, number, or text?</b>	
<input type="text" value="Please Select"/>	
Is Active: <b>Do you want this to be an active field?</b>	
<input type="text" value="Yes"/>	
Required: <b>Is this field required information(must be filled out)?</b>	
<input type="text" value="No"/>	
Use on Request Page: <b>Would you like this field to be on your service request page?</b>	
<input type="text" value="No"/>	
Is Required On Request Page: <b>Is this field required information(must be filled out on request page)?</b>	
<input type="text" value="No"/>	



# Creating Lists and Dropdowns

Customize and Organize Unique Data Points for your Company by Creating Lists and Dropdowns!



Select Tools → Custom Employee Fields



Lists & Dropdowns

### Manage Your Lists & Dropdowns

Lists & Dropdowns are a set of values that you manage for your own employees.

Examples: *Job Title, Department, Employment Status, Client, etc.*

Available Field Types: **Dropdown List.**

Add an unlimited number of fields to your employee's profile



Add New

Field Information	List/Dropdown Values <span style="float: right;">Required</span>
<p><b>Field Name:</b> Ex: Job Title, Department, Hospital Name</p> <input type="text"/>	<p><b>Is Multi-Select</b> (One or more choices can be selected at a time):</p> <input type="text" value="No"/>
<p><b>Is Active:</b> Do you want this to be an active field?</p> <input type="text" value="Yes"/>	<p><b>Enter Value:</b> Enter your list values here. Ex: CA, NJ, NY).</p> <input type="text"/> <span style="background-color: #4a4a8a; color: white; padding: 2px 5px;">Add Value</span>
<p><b>Required:</b> Is this field required information(must be filled out)?</p> <input type="text" value="No"/>	<p><b>Available Values:</b></p> <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <p style="text-align: center; font-size: small;">Add Selected</p>
<p><b>Use on Request Page:</b> Would you like this field to be on your service request page?</p> <input type="text" value="No"/>	<p><b>Selected Values:</b></p> <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <p style="text-align: center; font-size: small;">Remove Selected</p>
<p><b>Is Required On Request Page:</b></p> <input type="text" value="No"/> <b>Is this field required information(must be filled out on request page)?</b>	



### Navigating Employee Tags

Employee tags are used to add labels that provide additional context about employees. Once employees are tagged, they will be grouped together within your organization.

Tag	Last Name	First Name	Created By	Created On
Bilingual-Italian	Carlo	Trevisano	Rose, Jackie	11/25/2019
Bilingual-Mandarin	Chen	Hui	Rose, Jackie	11/25/2019
Bilingual-Mandarin	Tai	Mulan	Rose, Jackie	11/25/2019
Bilingual-Spanish	Love	Jane	Rose, Jackie	11/25/2019
Bilingual-Spanish	Gallardo	Gisel	Rose, Jackie	11/25/2019
BPP Cert	Lindgren	Lucia	Rose, Jackie	11/25/2019
BPP Cert	Chamberlain	Bonnie	Rose, Jackie	11/25/2019
BPP Cert	Meyers	Esther	Rose, Jackie	11/25/2019
CPR Certified	Blevin	Charles	Rose, Jackie	11/25/2019

All of these tags will be placed in Jane's profile, and will be assigned to her.



This is where you will see all of Janes current tags.

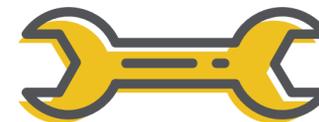
#### Jane's Tags

Use Tags to categorize an employee or candidate within your organization.  
e.g. Skills, Certifications, Expertise

*Re-using an existing tag increases relevancy*

Tag

Bilingual-Spanish



Type in an existing tag, or enter in a new tag for Jane's profile.



Tag: CPR Certified

Active	Last Name	First Name	Date of Birth	Start Date	Email Address	Phone Number	Company
	Blevin	Charles	5/16/1976	10/7/2019	charles.blevin@daisycorp.com	(262) 650-6116	Daisy Corp
	Dulin	Zara	5/25/1975	5/13/2019	zara.dublin@daisycorp.com	(614) 766-9657	Daisy Corp
	Kurihara	Isa		11/4/2019	isa.kurihara@daisycorp.com	(915) 750-5909	Daisy Corp

See what employees are all under the same tag in pod!  
Click on a listed tag and you will see each individual employees information.



### Navigating Status Reports

Get an exportable report of all service requests within a specified date range!

Search by Service Date
Required

**Earliest Service Date:**

**Latest Service Date:**

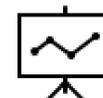
Run Report



Once your date range is selected, click on run report to get an exportable report of all your service requests within this specified range.

1	A	B	C	D	E	F	G	H	I	J	K	L
2	Report Range: 8/1/2019 to 11/3/2019											
3	<b>First Name</b>	<b>Last Name</b>	<b>Service Date</b>	<b>Service</b>	<b>Result</b>	<b>Company</b>	<b>Department</b>	<b>Departure</b>	<b>Employee ID #</b>	<b>End of Contract</b>	<b>Job Title</b>	<b>Location</b>
4	Kaseem	Almasi	9/23/2019	Pre-Placement Exam	Pass	Daisy Corp	Emergency	10/28/2019	5665432		Administration	New York
5	Kazuo	Azuma	10/1/2019	Pre-Placement Exam	Performed	Daisy Corp						
6	Favian	Barajas	10/7/2019	Pre-Employment Drug Screen	Performed	Daisy Corp	ICU	10/31/2019	3356789		Lab Tech	New Jersey
7	Favian	Barajas	10/22/2019	Pre-Placement Exam		Daisy Corp	ICU	10/31/2019	3356789		Lab Tech	New Jersey
8	Charles	Blevin	9/30/2019	Pre-Placement Exam	Performed	Daisy Corp						
9	Trevisano	Carlo	9/11/2019	Facility Healthcare Screening	Deferred	Daisy Corp	Pediatric		6798987		Pediatric MD	New York
10	Trevisano	Carlo	9/25/2019	ADHOC PROTOCOL	Pass	Daisy Corp	Pediatric		6798987		Pediatric MD	New York
11	Hui	Chen	9/11/2019	Facility Healthcare Screening	Pass	Daisy Corp	Psych		4325673		MD	New Jersey
12	Dustin	Daynor	9/13/2019	Pre-Employment Drug Screen	Pass	Daisy Corp	ICU	11/04/2019	9098765		Radiologist	New York
13	Dustin	Daynor	10/22/2019	Pre-Placement Exam		Daisy Corp	ICU	11/04/2019	9098765		Radiologist	New York
14	Martim	Dias	9/16/2019	Pre-Placement Exam	Pass	Daisy Corp	Emergency		8987653		Lab Tech	Chicago
15	Marcel	Dresner	9/16/2019	Pre-Employment Drug Screen	Pass	Daisy Corp	Pediatric	11/11/2019	7453423		Lab Tech	Chicago
16	Marcel	Dresner	10/18/2019	Pre-Placement Exam		Daisy Corp	Pediatric	11/11/2019	7453423		Lab Tech	Chicago
17	Gisel	Gallardo	9/10/2019	Facility Healthcare Screening	Deferred	Daisy Corp	ICU		3452652		MD	New York
18	Gisel	Gallardo	9/24/2019	ADHOC PROTOCOL	Performed	Daisy Corp	ICU		3452652		MD	New York
19	Ashley	Hennessey	9/12/2019	ADHOC PROTOCOL	Pass	Daisy Corp	Psych		9998543		Administration	Florida
20	Anja	Holtzmann	9/13/2019	Pre-Placement Exam	Pass	Daisy Corp	Emergency		7765487		RN	Chicago
21	Dustin	Huffman	10/1/2019	ADHOC PROTOCOL	Performed	Daisy Corp						
22	Steven	King	9/23/2019	Pre-Placement Exam	Pass	Daisy Corp	Pediatric		3452875		Pediatric RN	New Jersey
23	Isa	Kurihara	9/12/2019	ADHOC PROTOCOL	Pass	Daisy Corp	Emergency	11/04/2019	5564327		Administration	Florida
24	Isa	Kurihara	10/22/2019	Pre-Placement Exam		Daisy Corp	Emergency	11/04/2019	5564327		Administration	Florida
25	Daniel	LaRusso	10/18/2019	Pre-Placement Exam		Daisy Corp	Emergency	10/18/2019	8909876		MD	Chicago
26	Nadia	Laursen	9/25/2019	Annual Physical Exam	Performed	Daisy Corp	Pediatric		8543875		Pediatric MD	Florida
27	Lucia	Lindgren	10/10/2019	Pre-Placement Exam	Performed	Daisy Corp	Psych		4343235		RN	New York

Your companies custom fields are included in the status report!



### Navigating Advanced Search

Use Employee or Company Specific information to search for employees or candidates through your pod rosters.

Standard Fields

First Name	Last Name
Date of Birth	Start Date
Service Date Range	Expiration Date Range
Protocol	Procedure
Current Status	Service Status
Tag	

Use your custom fields to search for an employee or candidate with company specific information...

Custom Fields

Select up to 2 fields to search

Emergency	Department
Departure	
Employee ID #	
End of Contract	
MD	Job Title
Location	
Work phone	





# Navigating User Management

Administrators can grant or deny access to each feature for any pod users within their company.



## Step 1

Select User: ⓘ

Please Select ▼  
Please Select  
Rose, Jaclyn

Select the user you want to modify pod access for.



## Step 2

Screen Details		
Administration		Full Access ▼
Advanced Search	<b>Full Access:</b> Able to view all information and access this feature	Full Access ▼ No Access Read-Only
Attention Needed		Full Access ▼
Cleared Services		Full Access ▼
Compliance Manager		Full Access ▼
Custom Data	<b>No Access:</b> Unable to view or access information for this feature	Full Access ▼
Employee Details		Full Access ▼
Employee Roster		Full Access ▼
Employee Tags		Full Access ▼
Exam Details		Full Access ▼
Request Services	<b>Read Only:</b> Able to view the feature but cannot manipulate data.	Full Access ▼
Scheduled Today		Full Access ▼
Special Follow Up		Full Access ▼
Status Report		Full Access ▼

Go through each feature and decide what type of access you would like to grant the user.

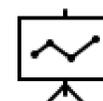


## Step 3





FAQ



## Dashboard

### What does 'Awaiting Registration' mean?

When you see a number above the awaiting registration icon on the dashboard, this means that the employee or candidate still needs to register by completing the registration link that was sent to them by email. Registration completion provides NMS's team with valuable information to get them through the screening process efficiently.

### What are the circumstances of an employee or candidate falling into the 'Special Follow-up' section?

The Special Follow-up section shows pod users which employees or candidates are currently undergoing additional follow-up with the NMS medical administration team based on their exam results. No further action is required from your team, unless otherwise communicated directly from NMS. Some examples of screenings that fall into this special follow-up category could be an employee that has an abnormal drug screen result, has received a low titer result, or a positive TB reading.

### What is the purpose of the 'Active Services' section on the dashboard?

The active services section on the dashboard show you all your current open, and active service requests. In the active services view, your team gets insight into the employees' scheduled service date, the protocol they are receiving, the date the service was requested, and the stage that the employee or candidate is currently at in their screening process.

For a more detailed and broken-down view of all service information for a specific employee, you can click on the binoculars to the left of the service date. Once you click on these binoculars, you will be fast tracked to the Service Details page.

You can also organize these employees or candidates by custom fields on the top right of the active services section.

## Employee Profile

### How do I create a new request from an employee or candidates' profile?

To create a new request for an employee or candidate from their profile, you can look under the Quick Actions tool bar and click Create New Request.

### Some of my employee or candidate's information on their profile is wrong, how do I edit this?

To edit your employee or candidate's information, click 'View/Edit All Employee Info' under their name and information on the top of the employee profile page.

## How do I view more specific details about my employee or candidate's screening process?

To view more specific details about where your employee or candidate is in the screening process, click on the protocol name next to the blue and white health cross symbol. This will take you to the services details section.

You can also click on the protocol name in the overall activity section to be taken to the services details section.

## How do I reach out to a client services team member from the employee's profile page?

To get additional updates or information from a client services team member, please select Get Update from Client Services under the Quick Actions toolbar. You can write a message to our client services team that will be sent to them directly!

## What exactly are 'Tags' for on each employee or candidate's profile page?

Tags can be used to categorize employees or candidates with unique skill sets or attributes.

For example, maybe you want to be able to find employees who have a specific skillset, certification, or expertise within your company.

You can 'tag' these employees or candidates on their employee profile, and it will automatically be organized for you in your Employee Tags section in pod.

# Employee Roster

## How do I create a new service request from the employee roster?

To create a new service request, click on the green wheel next to the employee or candidates name.

## How do I view the employees' profile from the employee roster?

To view the employee or candidates' profile from the employee roster, click on the blue glasses next to the employee's name.

## How do I view my custom fields on the employee roster?

To organizer your employees or candidates when viewing your roster use the dropdown above manage custom fields. You can choose up to two custom fields to view at a time on your employee roster.

# Service Requests

## How do I make sure the NMS Client Services team sees important scheduling information for a specific employee or candidate?

If you need an NMS Client Services team member to see important information when scheduling an employee or candidate, this would go in the 'Additional Employee Information' section on the 'New Service Request' page. You can put any important comments you want the client services team to know about the individual.

## **Why am I getting an error message when I am trying to submit a new request?**

An error message means that you must fill out additional information before submitting your request. This means you either need to fill out required information in the employee information section, service information section, or, you need to fill in a required field in the custom employee fields section. Once all required information is provided, you then will be able to submit your request.

# **WorkFit**

## **What is a WorkFit Profile?**

A WorkFit profile is a specific set of screenings selected by your company. The screenings inside your WorkFit profile are used to determine "Fit for Duty" statuses for your employees or candidates.

## **What is the difference between Pass on an Exam and Fit as a WorkFit status?**

When you see a "PASS" status for your employees or candidates at an exam level, this is indicating that they were medically cleared for the particular service or health screen requested. A "FIT" status indicates they are now ready to perform all necessary job functions for your company based on the screenings that were deemed necessary/critical during WorkFit Profile setup.

## **How did you come up with my WorkFit profile?**

A WorkFit profile is created by selecting a list of screenings to fulfill the specific requirements that your company or administrator has set. These specific requirements could be based on your own company standards, but also includes Fit for Duty programs such as OSHA Medical Surveillance, Maritime Medical Surveillance including USCG exams, or DOT exams.

Example of a WorkFit Profile:

- Physical Exam
- Audiogram
- Drug Screen - 5 Panel
- PPD Test

## **Do I need a subscription to activate WorkFit?**

Yes. We would be more than happy to discuss all the exciting features and benefits of pod! Speak to a pod specialist today about which subscription would best suit the needs of your company. Contact [podsupport@nmshealth.com](mailto:podsupport@nmshealth.com)

## **How do I sign up for WorkFit?**

WorkFit is included in a Premium pod subscription. If you have a Premium pod subscription, speak to a pod specialist to set-up an appointment to create your company's 'WorkFit Profile'.

## **What are the benefits of WorkFit?**

There are many benefits of pod WorkFit.

- WorkFit allows you to have a specific profile that monitors each employee or candidate's 'Fit for Duty' statuses by tracking screenings that your company deems critical.
- WorkFit's service details section gives you a simple view into your employee or candidate's individual WorkFit screening details. The service details section also gives you a look at upcoming compliance expiration dates.
- Export and view your employee roster to show you an organized list of all employees or candidates current WorkFit statuses.

## **Why am I not seeing any of my employees or candidates WorkFit statuses?**

WorkFit statuses will appear when a WorkFit profile is created, and a new service is requested with a procedure that falls within your WorkFit profile.

### **What's the difference between the compliance tracker and WorkFit?**

The Compliance Tracker currently tracks individual screenings that need to be renewed within a certain period of time (usually a year) to keep the employee or candidate compliant within your company's health standards (e.g. DOT medical certifications, Audiograms, Annual Exams).

WorkFit allows you to create an entire profile that requires the employee or candidate to be medically cleared and compliant for them to be deemed 'Fit for Duty'.

For example: An employee can be compliant for an audiogram inside the compliance tracker, but can be considered expired or unfit in the WorkFit profile for other screenings deemed necessary for a "FIT" status.

### **Can I limit access to who can view and/or manage WorkFit?**

Yes, this can be done through the User Management page (administrator tool) inside of pod. Please refer to the following Help Center article and see section "Administration Feature for WorkFit" <https://www.nmshealth.com/workfit>

### **My trial is about to expire, what do I do to reactivate WorkFit?**

Please speak to a pod specialist about upgrading your subscription by contacting [podsupport@nmshealth.com](mailto:podsupport@nmshealth.com)

## **Creating Custom Fields**

### **What are Freeform Fields?**

A freeform field allows you to assign unique data points to your employees or candidates. There are three field type options to choose from when creating a custom field. These three options are date, text, or numbers. Each freeform field allows you to input one value only, per employee.

### **What are Lists and Dropdowns?**

Lists & Dropdowns allow you to customize and organize your unique data containing multiple data points. When creating a dropdown list, you are able to easily select which data point your employee specifically falls under. If you need to select multiple values for an employee, you can choose 'multi-select' which allows you to select multiple data points for that specific employee. Lists & dropdowns allow you to standardize a list of values that can be used over and over (e.g. department titles, managers, project locations, etc...)

### **How to make a custom field required for team members to fill out when requesting a new screening?**

To make a custom field mandatory and required to fill out on the request page is simple! When you are creating a freeform field or list and dropdown, there are two options when creating a new field. First, to make this custom field appear on the request page, you must select 'yes' when asked 'use on the request page'. To make the custom field mandatory on the request page, meaning it must be selected or filled out in order to submit the request, you must select 'yes' when asked 'is it required on the request page?'

## **Employee Tags**

### **How do I view all the employees or candidates that I have assigned a certain tag to?**

Go to the "Employee Tags" section under tools and select the tag that you would like to view, under 'All Company Tags'. This will show you all the employees or candidates that have been assigned that tag.

### **What is the difference between 'All Company Tags' and 'My Tags'?**

'All Company Tags' will show the tags that have been created for employees and candidates by all your company's permitted pod users. 'My Tags' will show the tags that only you have created for employees and candidates.

## **User Management**

### **How do I grant or limit access to specific pod users in my company?**

Click on the Administrator tab, and then select the specific pod user you would like to grant or limit access to.

You then will be able to view all screen access areas in pod. You can grant or limit this user either full access, no access, or read only access. Read only access means that they will be able to view the information on the page, but will not be able to click on, or change any information.