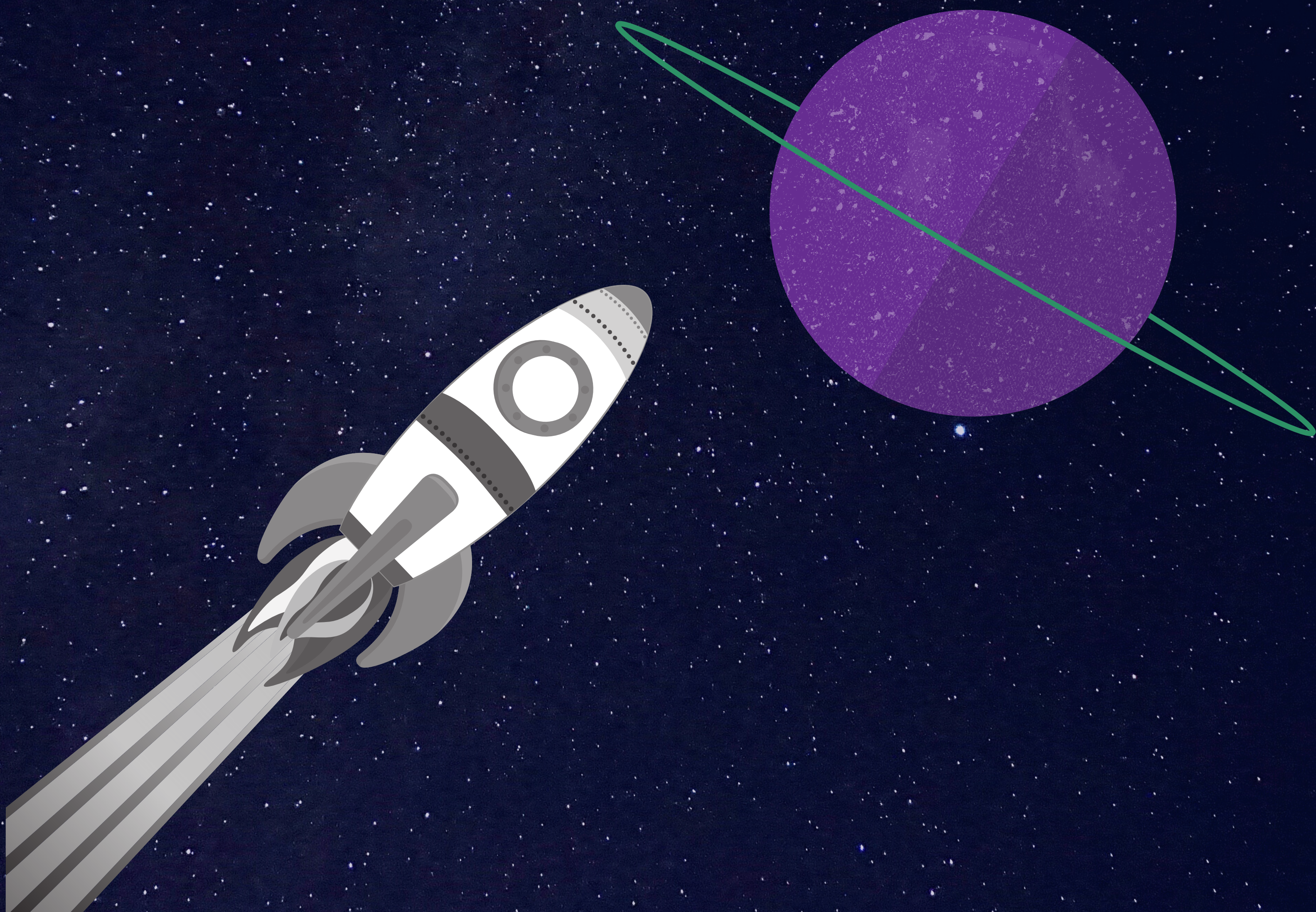


# pod

## The Ultimate Guide



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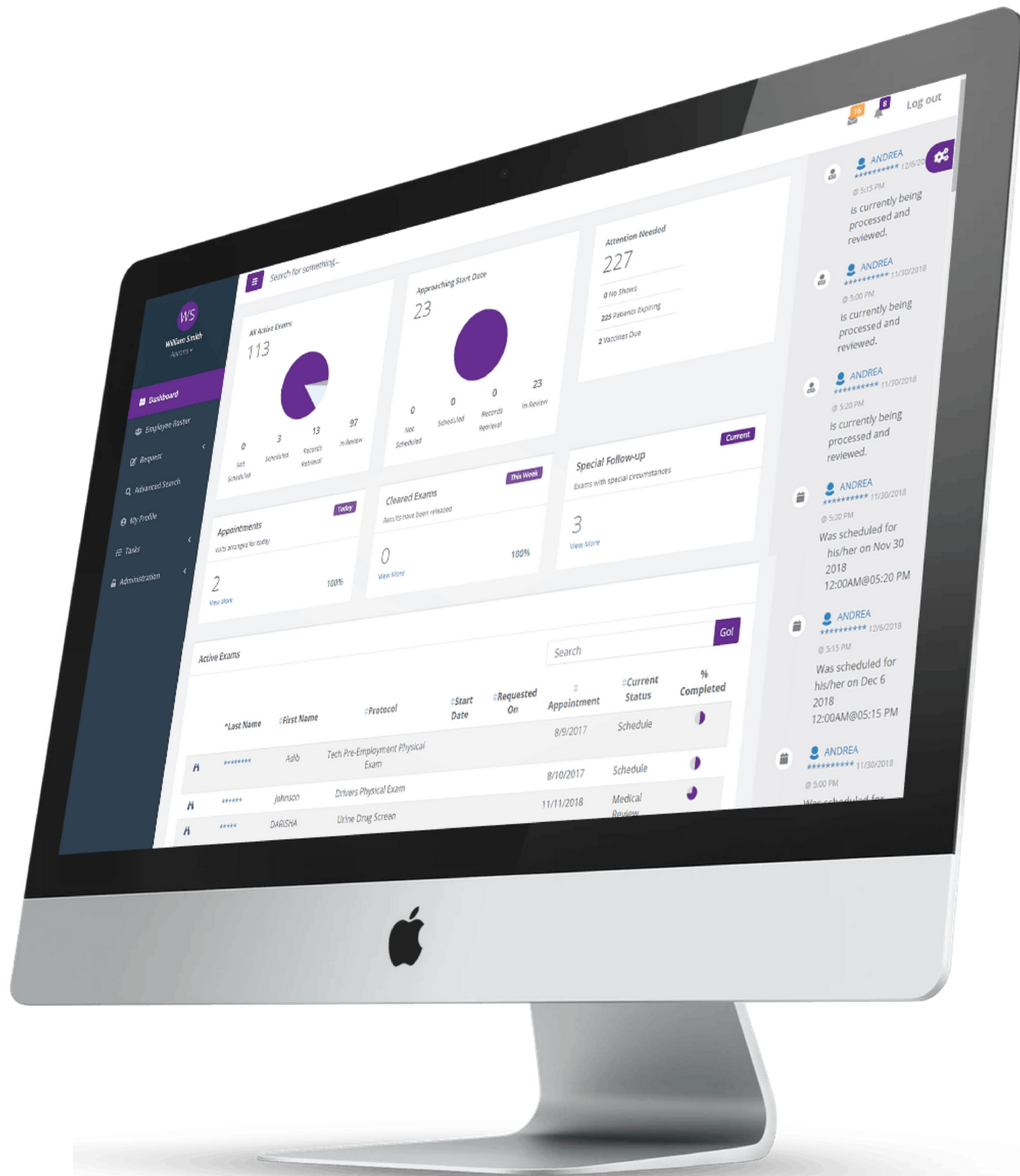
**30-33**

**Features FAQ**

---

# 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.



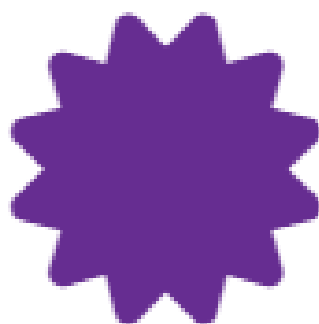
Employee rosters, dashboards & more



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

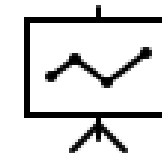
Create custom employee tags to categorize an employee or candidate within your organization. e.g. Skills, Certifications, Expertise.

## ADVANCED SEARCH

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

## USER MANAGEMENT

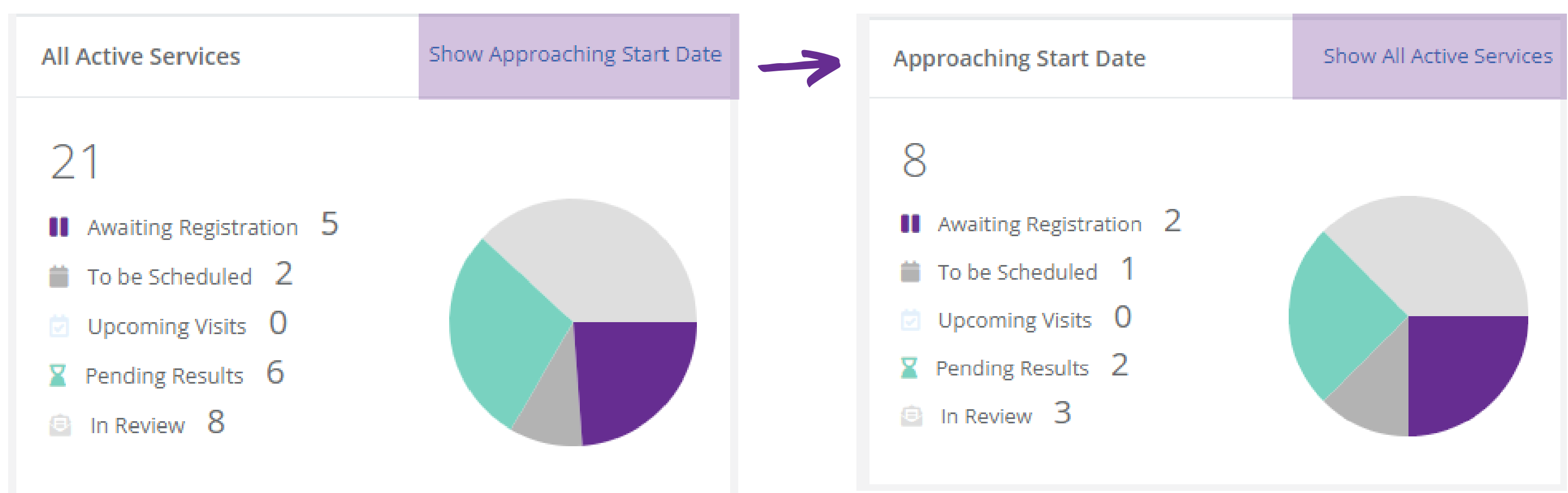
Administrators can grant or deny access to each feature for any pod user within the company.



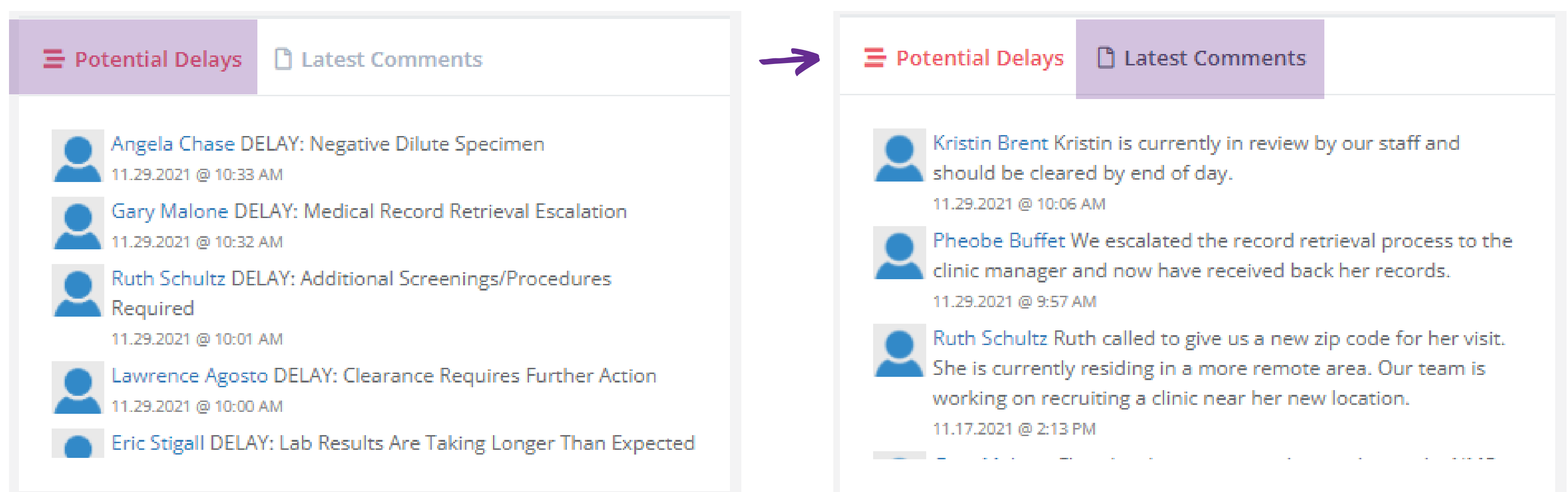
## Navigating the Dashboard


These new dashboard features were created to provide you with deeper insight and visibility into your employees and/or candidates screening process.

Click to toggle between 'All Active Services' and 'Approaching Start Date' within one view.




A new feature that shows 'Potential Delays' and the 'Latest Comments' from NMS.





**Kristin Brent**  
11/29/2021 @ 8:00 AM

Annual Physical Exam is currently being processed and reviewed.









**Ruth Schultz**  
11/22/2021 @ 6:30 AM

Vaccine Series is currently being processed and reviewed.

Active Services

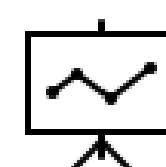
When the Comment Icon is green; comments have been left by NMS Staff.

All
Approaching Start Date
Add Custom Fields to View

|   |   |   | Service Date | Last Name | First Name | Protocol           | Start Date | Company    | Activity                                   | Status                | Est. Completion |
|---|---|---|--------------|-----------|------------|--------------------|------------|------------|--|-----------------------|-----------------|
|  |  |  | 11/22/2021   | Malone    | Gary       | Pre-Placement Exam | 12/6/2021  | Daisy Corp | DELAY: Medical Record Retrieval Escalation | Confirming Attendance | 11/23/2021      |
|  |  |  | 11/26/2021   | Cannon    | Travis     | Pre-Placement Exam | 12/13/2021 | Daisy Corp | Collecting Records from Clinic             | Pending Results       | 11/27/2021      |

The 'Estimated Completion' date is created based on medical record retrieval.

**\*\*If a certain procedure or clinic has not accrued enough data within our system, an 'Estimated Completion' date may not be available.\*\***



## Navigating Employee Profiles

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

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

**Quick Actions**

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

**Zara's Compliance Info**

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

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

**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

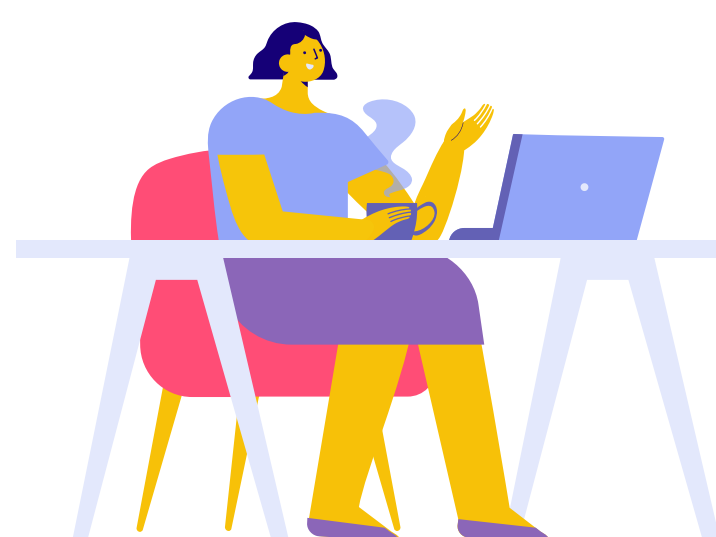
**Friendly Name:**

**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!



## Feature Guide



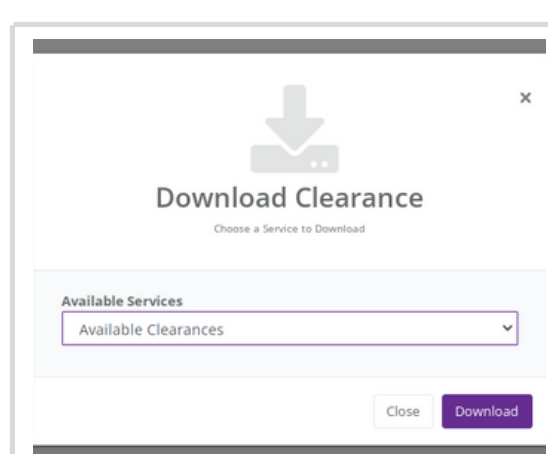
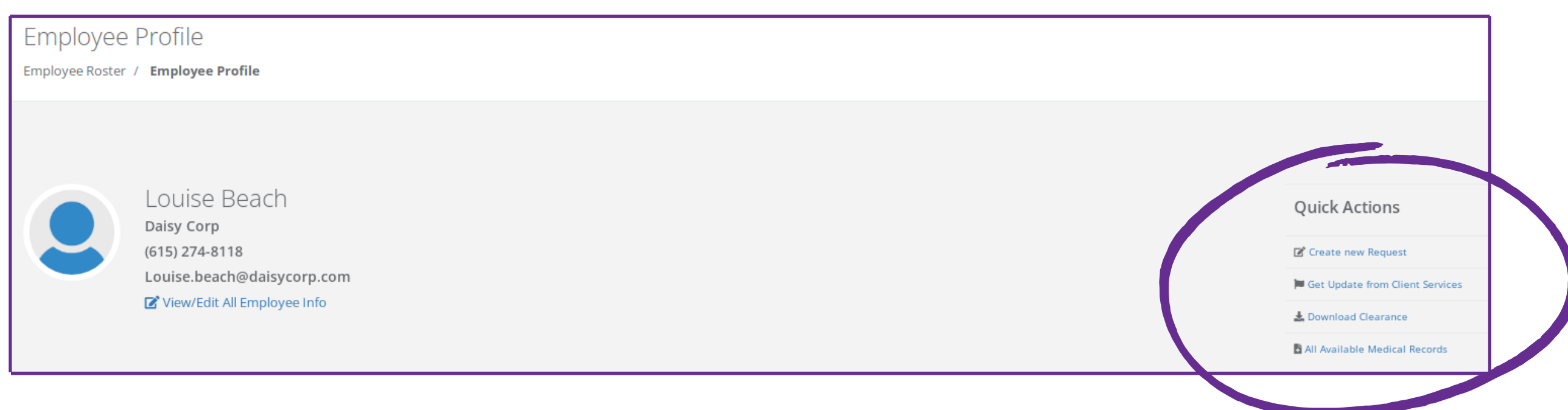
### Quick Actions Menu

The **Quick Actions Menu** conveniently encompasses the most common requests for your services teams.

#### Locating Quick Actions Menu in pod

From the **Employee Profile Screen**:

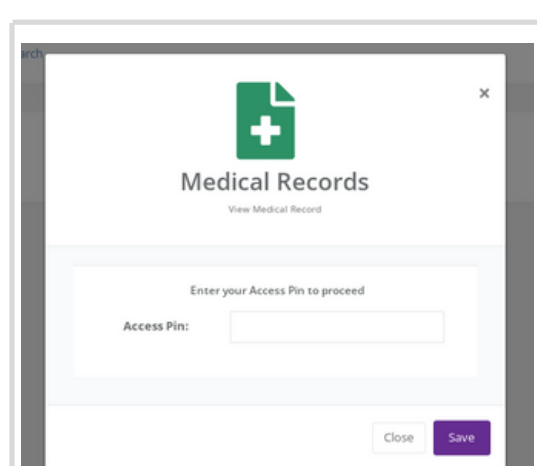
The **Quick Action** menu is located on the left-hand side of the **Employee Profile**

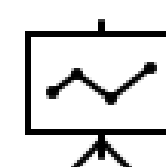


The **Quick Action** menu makes it simple to follow up on an employee's services.

#### Employers can:

- Create a new service request for additional services
- Request updates and follow-up from the NMS Health team
- Download clearances
- View any available medical records in PDF format. These records are available by entering your unique PIN.





## Navigating Service Details

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

Isabella Yurieva

Pending

Other Services for Isabella

Service Status:

Upcoming Visit

Service Date:

9/26/2019

Protocol:

Pre-Employment Drug Screen

Performed:

0/2

Procedures:

0/2

Procedures Results:

0/2

Facility:

Academic Healthcare  
Old Westbury, NY

Completed:

Awaiting Reg.

To Be Scheduled

Upcoming Visit

Pending Results

In Review

Disclosure Date:

Last Updated:

9/23/2019@6:10 PM

Last Updated By:

Jackie Rose

### Service Activity

- Pre-Employment Drug Screen 9/23/2019 @ 6:10 PM

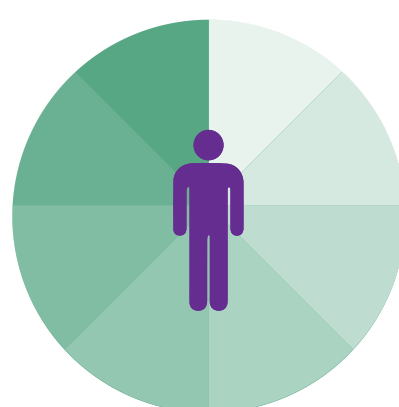
Employee was scheduled
- Pre-Employment Drug Screen 9/23/2019 @ 6:10 PM

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

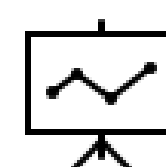
Jaclyn Ribaud Isabella requested a to go to labcorp for her drug test  
09.24.2019 @ 3:22 PM

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





## Feature Guide















# 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 RosterInactive Roster

Show Custom Fields (Max. 2)Manage Custom FieldsExport Roster

Use the ✓ to mark employees inactive

|   | 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...

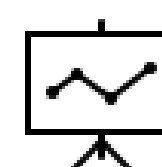
Export Roster  
View Download

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:

Daisy Corp

Rush Scheduling:

☐ Rush Schedule this Request (5 Remaining for the month)

Protocol:

Pre-Placement Exam

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 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.

Custom Employee Fields

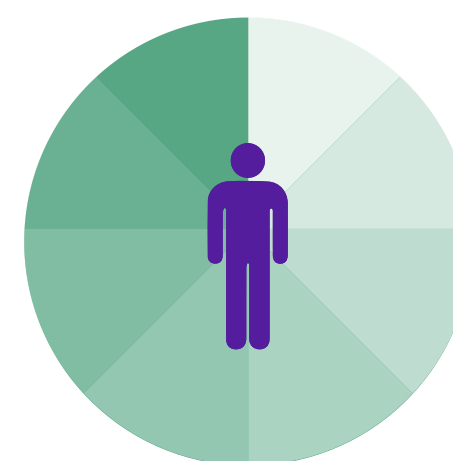
Employee ID # \*

Location \*

Department \*

Departure \*

Job Title \*





## Navigating the Pre-Screen Feature

The Pre-Screen feature allows you to upload any previous medical records so your employees will only be scheduled for the services they need.

### How to Utilize Pre-Screen in pod

From the Service Request Screen:

When submitting a service request you are given multiple options under the Pre-Screen header

Requesters can choose to:

- Upload prior medical records that they have on the employee's behalf
- Have the employee upload their own records after the request is submitted
- Proceed with the service request without a Pre-Screen

Service Information Required

Company:  
Daisy Corp

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

Additional Contact:  
Please Select

Pre-Screen:  
☐ I would like to upload records on the employee/candidate's behalf  
☒ I want the employee/candidate to upload their own records  
☐ Pre-screen not required

If you choose to upload records on behalf of the employee, you will be instructed to attach and upload those records on a new page once you submit the request.

If you choose to have the employee upload their records, this will trigger an automatic email to the employee advising them to upload the records once the request is submitted.

Once records are submitted, the NMS Health team will review and schedule the employee for any necessary remaining services.



## Navigating the Non-Responders Feature

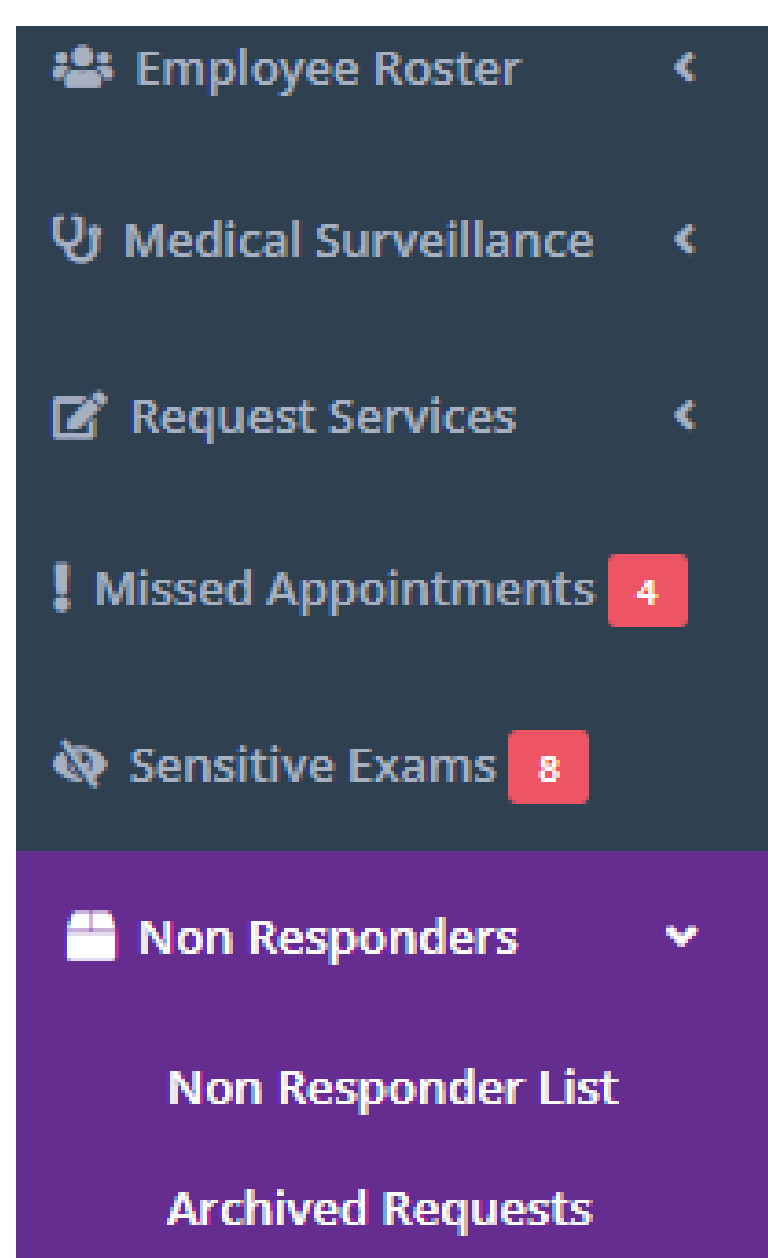
Found under the Non-Responder tab on the left-hand navigation menu, it's easy to keep track of employees and candidates who have not registered for their screening

|  | Requested On | Archived On | Last Name | First Name |
|--|--------------|-------------|-----------|------------|
|  | 11/19/2021   | 4/11/2022   | Williams  | Lisa       |
|  | 11/19/2021   | 4/11/2022   | Reed      | Paul       |
|  | 3/21/2022    | 4/11/2022   | Powers    | Bill       |

Employees and candidates who have not responded to registration attempts will be marked as a non-responder after 72 hours.

Any of services requests older than 22 days with a status of awaiting registration are automatically moved to the archived requests page in pod.

*\*Timing for employees receiving drug screen only services will vary; drug screen only services will be classified as a non-responder after 24 hours and will Auto-Archive 2 weeks from the request date.*



### Accessing Archived Requests

Archived Requests are found on the left menu navigation, under Non-Responders, in the submenu titled Archived Requests. Here you will find any previously requested services that have not received a response to register in 22 days.

### Accessing Non-Responders List

The Non-Responders List can found on the left menu navigation, under Non-Responders, in the submenu titled Non-Responder List. Here you will find any requested services that have not received a response to register after 72 hours, but before the 22 day mark.



## 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 employee 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 employee's 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.**

Expiring/Expired

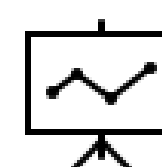
In Compliance

All



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

##### Fit

*Expires: 10/5/2019*

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

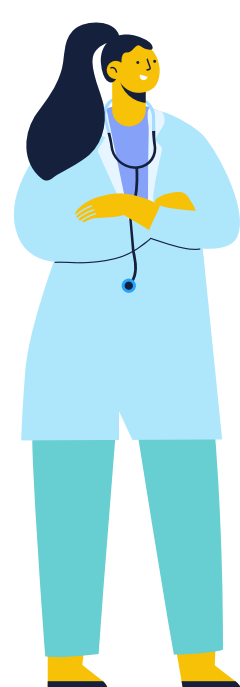
##### Unfit

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.


##### Expired

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

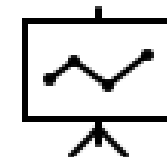


← Compliance expiration dates for each medical screening

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

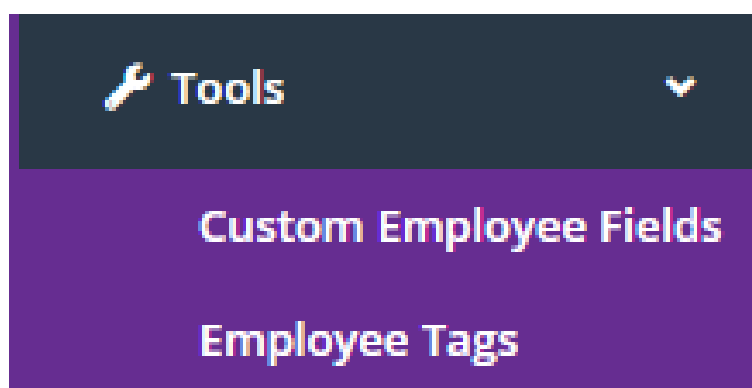
##### Pending

Therefore, a WorkFit status has not yet been assigned.



## 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.

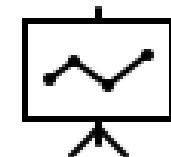
Examples: *Employee Id Number, Work Phone Number, End of Contract, etc.*

Available Field Types: Text, Number, Date.

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

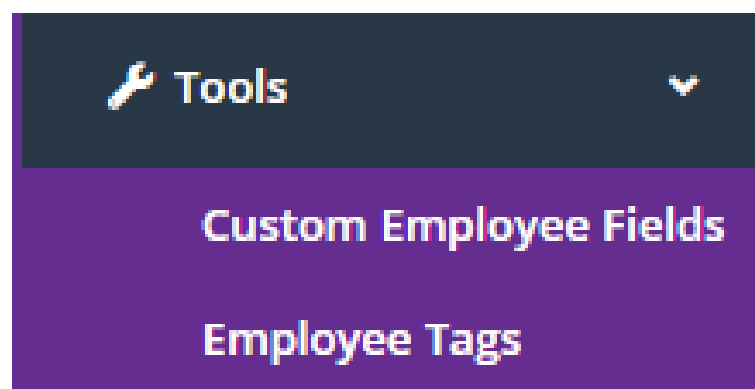
Add New

| Field Information   | Required |
|---|----------|
| Field Name: <b>EX: Employee ID, Work Phone #, End of Contract</b>   |          |
| Field Type: <b>Date, number, or text?</b>   |          |
| Is Active: <b>Do you want this to be an active field?</b>   |          |
| Required: <b>Is this field required information(must be filled out)?</b>                                    |          |
| Use on Request Page: <b>Would you like this field to be on your service request page?</b>                   |          |
| Is Required On Request Page: <b>Is this field required information(must be filled out on request page)?</b> |          |



## 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.*

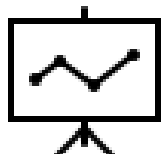
Available Field Types: Dropdown List.

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



Add New

| Field Information  | List/Dropdown Values   | Required  |
|--|--|---|
| <b>Field Name:</b> Ex: Job Title, Department, Hospital Name<br><input type="text"/>  | <b>Is Multi-Select</b> (One or more choices can be selected at a time):<br><input type="text" value="No"/> |   |
| <b>Is Active:</b> Do you want this to be an active field?<br><input type="text" value="Yes"/>  | <b>Enter Value:</b> Enter your list values here. Ex: CA, NJ, NY).<br><input type="text"/>                  | <input type="button" value="Add Value"/>  |
| <b>Required:</b> Is this field required information(must be filled out)?<br><input type="text" value="No"/>                                    | <b>Available Values:</b><br><div style="border: 1px solid #ccc; height: 100px; width: 200px;"></div>       | <b>Selected Values:</b><br><div style="border: 1px solid #ccc; height: 100px; width: 200px;"></div> |
| <b>Use on Request Page:</b> Would you like this field to be on your service request page?<br><input type="text" value="No"/>                   | <input type="button" value="Add Selected"/>  | <input type="button" value="Remove Selected"/>  |
| <b>Is Required On Request Page:</b><br><input type="text" value="No"/> Is this field required information(must be filled out on request page)? |  |   |

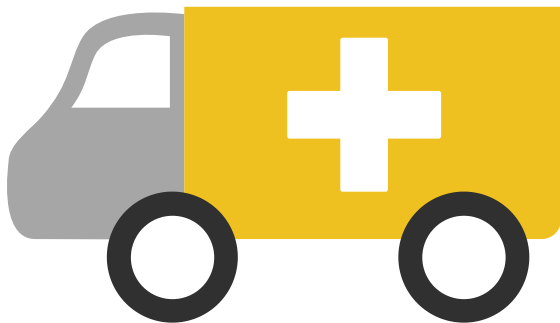


## Navigating Employee Tags

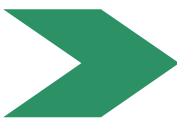
Employee tags are used to add labels that provide additional context about employees. Once employees are tagged, they will be grouped together within your organization.

| 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

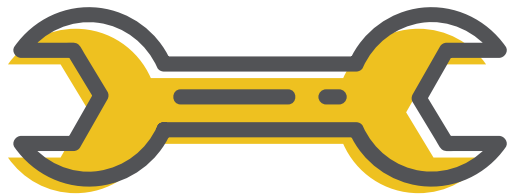
Use Tags to categorize an employee or candidate within your organization.

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:

08/01/2019

Latest Service Date:

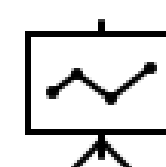
11/03/2019

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.

|    | A                                   | B         | C            | D                             | E         | F          | G          | H          | I             | J               | K              | L          |
|----|-------------------------------------|-----------|--------------|-------------------------------|-----------|------------|------------|------------|---------------|-----------------|----------------|------------|
| 1  | Report Range: 8/1/2019 to 11/3/2019 |           |              |                               |           |            |            |            |               |                 |                |            |
| 2  |                                     |           |              |                               |           |            |            |            |               |                 |                |            |
| 3  | First Name                          | Last Name | Service Date | Service                       | Result    | Company    | Department | Departure  | Employee ID # | End of Contract | Job Title      | Location   |
| 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

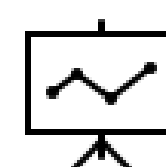
| Screen Details     |   |             |
|--------------------|---|-------------|
| Administration     | <b>Full Access:</b><br>Able to view all information and access this feature | Full Access |
| Advanced Search    |   | Full Access |
| Attention Needed   |   | No Access   |
| Cleared Services   |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



Save



## Medical Records Access for Administrators

### Step 1: Check your email for registration link

Medical record access has been enabled for your company.

You have been sent a sign-up email.

### Step 2: Set-up your unique security pin



Your pin needs to be between 4-6 digits.

**No Access**

In order to view medical records, approval is needed.  
Please use the form below to submit a request.

Create a Pin:

This will be used to access medical records

Confirm Pin:

Select Company Access:

➔ **Medical Record Administrator:**

☒ Yes, I am the Medical Record Administrator

[What is a Medical Record Administrator?](#)

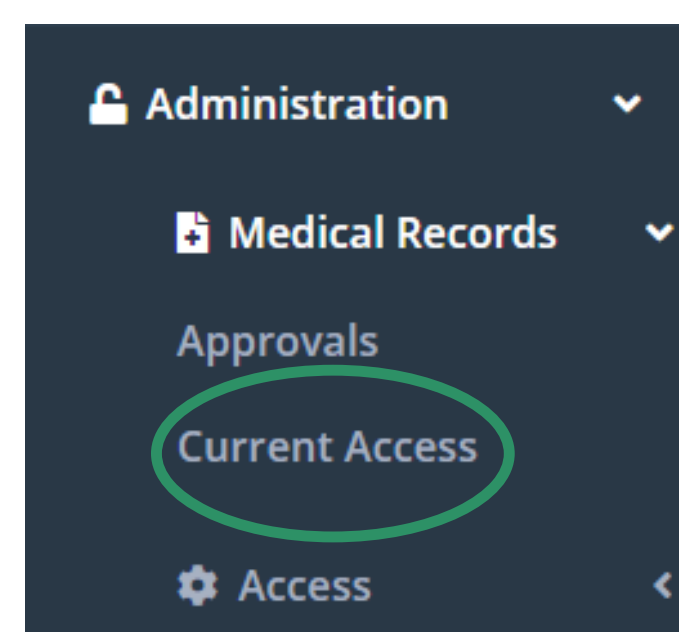
**Please Note: The first person requesting access for your company will automatically become the Medical Record Administrator.**  
(This can be changed or delegated after the initial request has been approved).



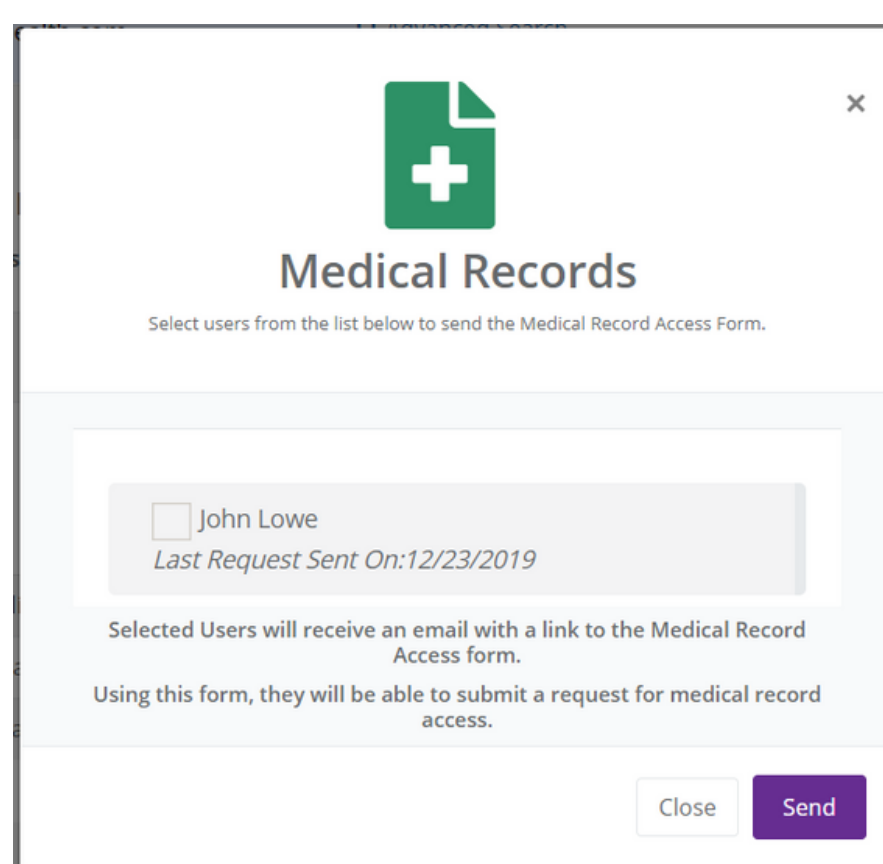
## Medical Records Access for Team Members

Follow the directions below to grant medical record access to your team members.

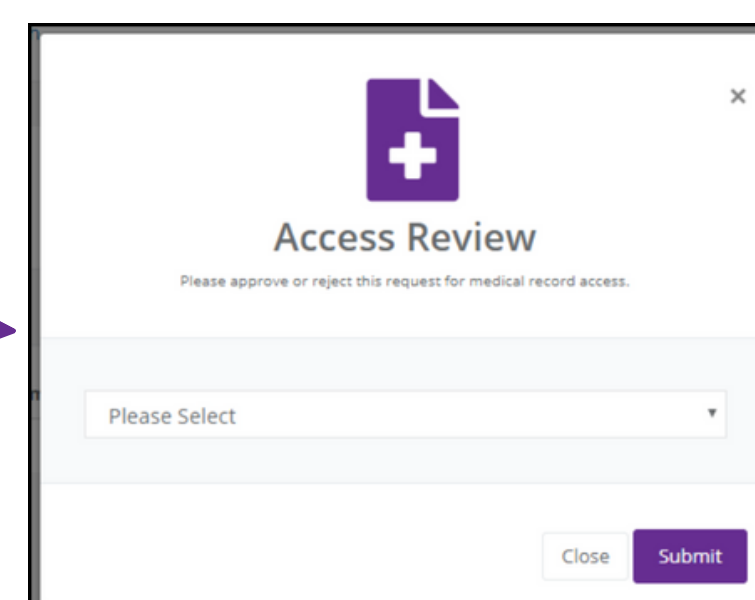
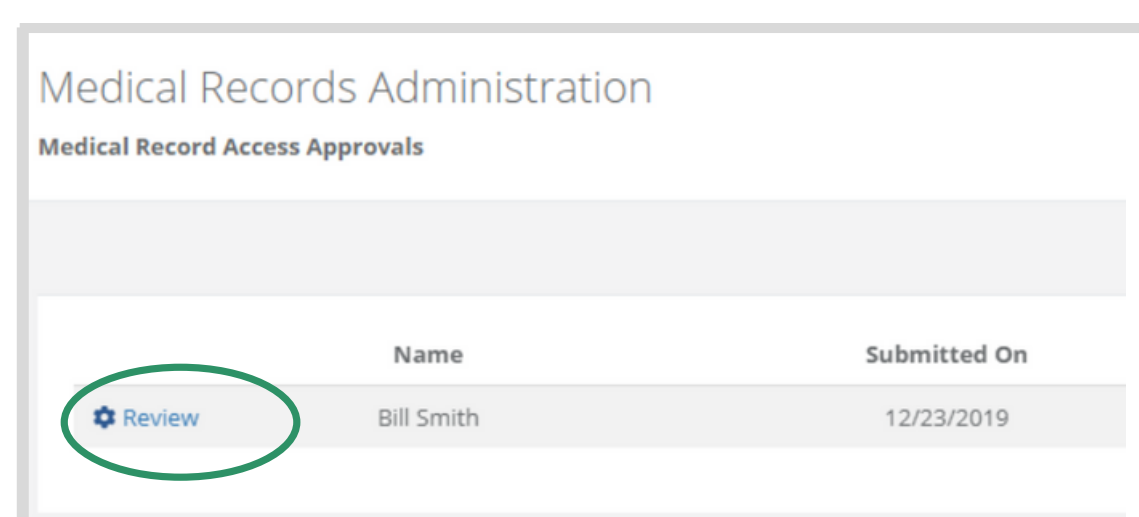
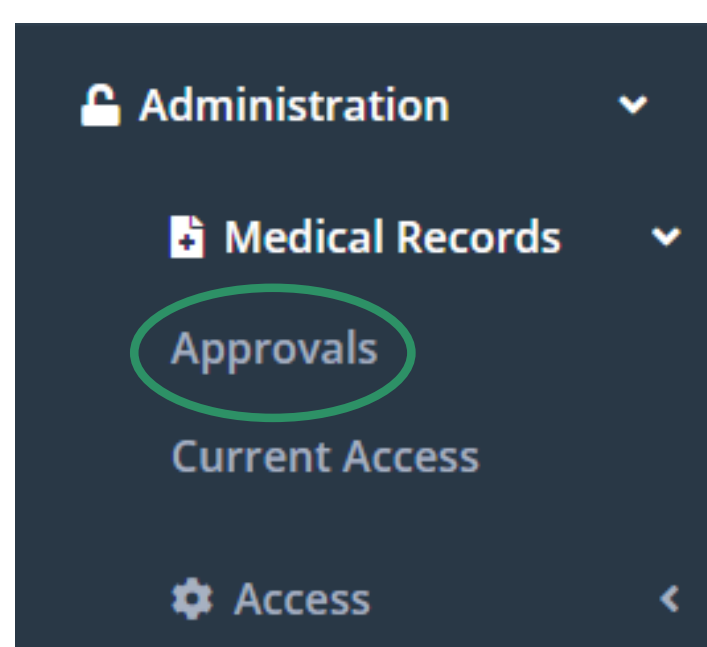
From the left menu select:  
Administration → Medical Records → Current Access.

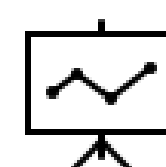


Select existing pod user(s) and press send.  
This will send them an email registration link instructing them to create a security pin.



**Approving medical records access for other users**  
Follow the directions below to approve a team members access to medical records.

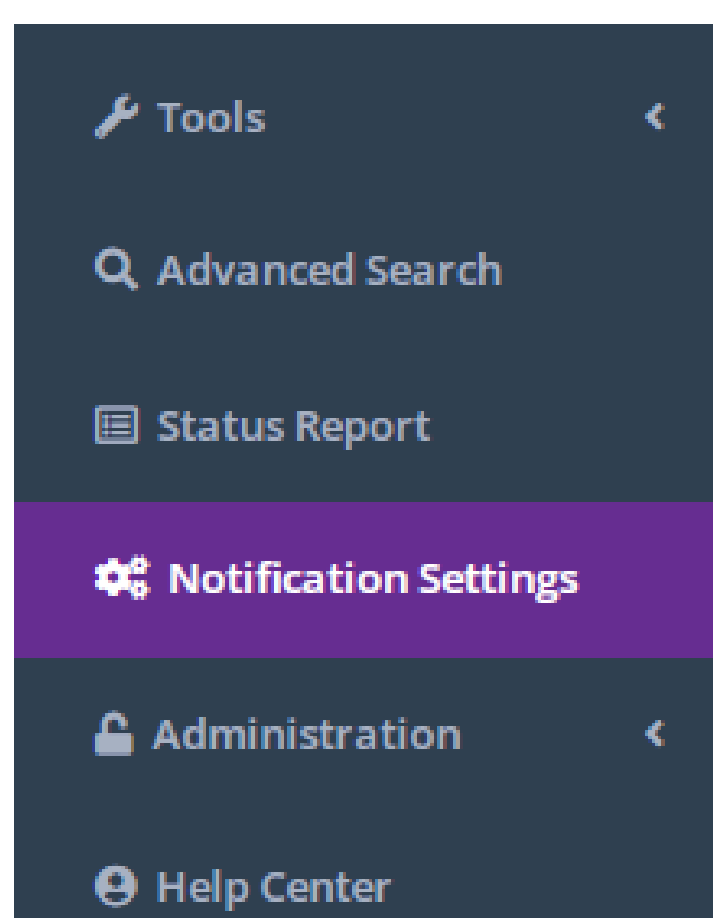




## Notification Settings

**Do you want to decide how many alert emails you receive from pod? Notification settings are customizable in the Notification Settings feature.**

**Step 1: Click on Notification Settings on the main navigation menu**



**Step 2: Choose the alerts you want you and your team members to receive.**

Options include alerts for when an employee is scheduled, when their results are ready, and service result confirmation.

The screenshot shows the 'Email Notification Settings' form. It has a purple header bar with the title 'Email Notification Settings'. Below the header, there are three sections:

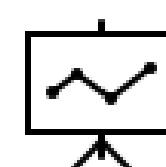
- Companywide Notification Settings:** This section contains three checkboxes, all of which are checked:
  - ☒ Receive Scheduled Alerts
  - ☒ Receive Exam Results
  - ☒ Receive Service Results Confirmation
- Company/Business Unit Preference:** This section contains two side-by-side lists. The left list is titled 'Available Companies/Business Units' and is currently empty. The right list is titled 'Selected Companies/Business Units' and contains one entry: 'Daisy Corp'. Below the 'Available' list is a button labeled 'Add Selected'. Below the 'Selected' list is a button labeled 'Remove Selected'.
- My Notification Settings:** This section contains one checkbox:
  - ☐ Receive All Alerts for Requests I Submit
 Below this checkbox is a note: 'This setting will ignore Company/Business Unit Preferences'.

Please note, individual team members can override these settings by choosing to receive all alerts in "My Notification Settings".

**Step 3**



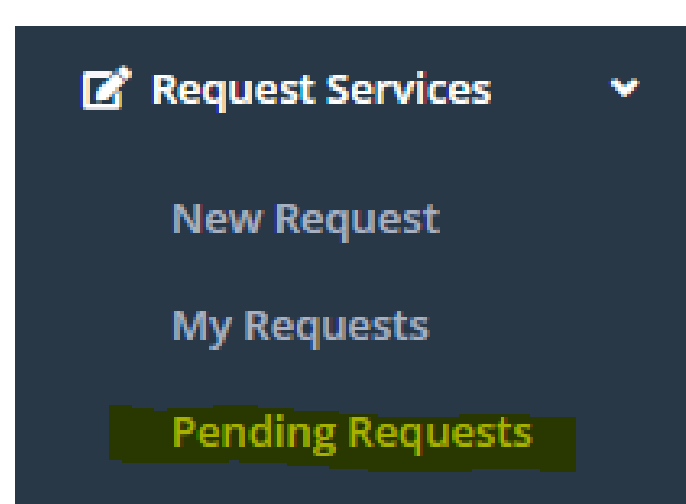
**Save**



## Resend a Registration Email

**Are you needing to resend a registration email to your employee and/or candidate? No problem! Follow the steps below to retrigger this email directly in pod.**

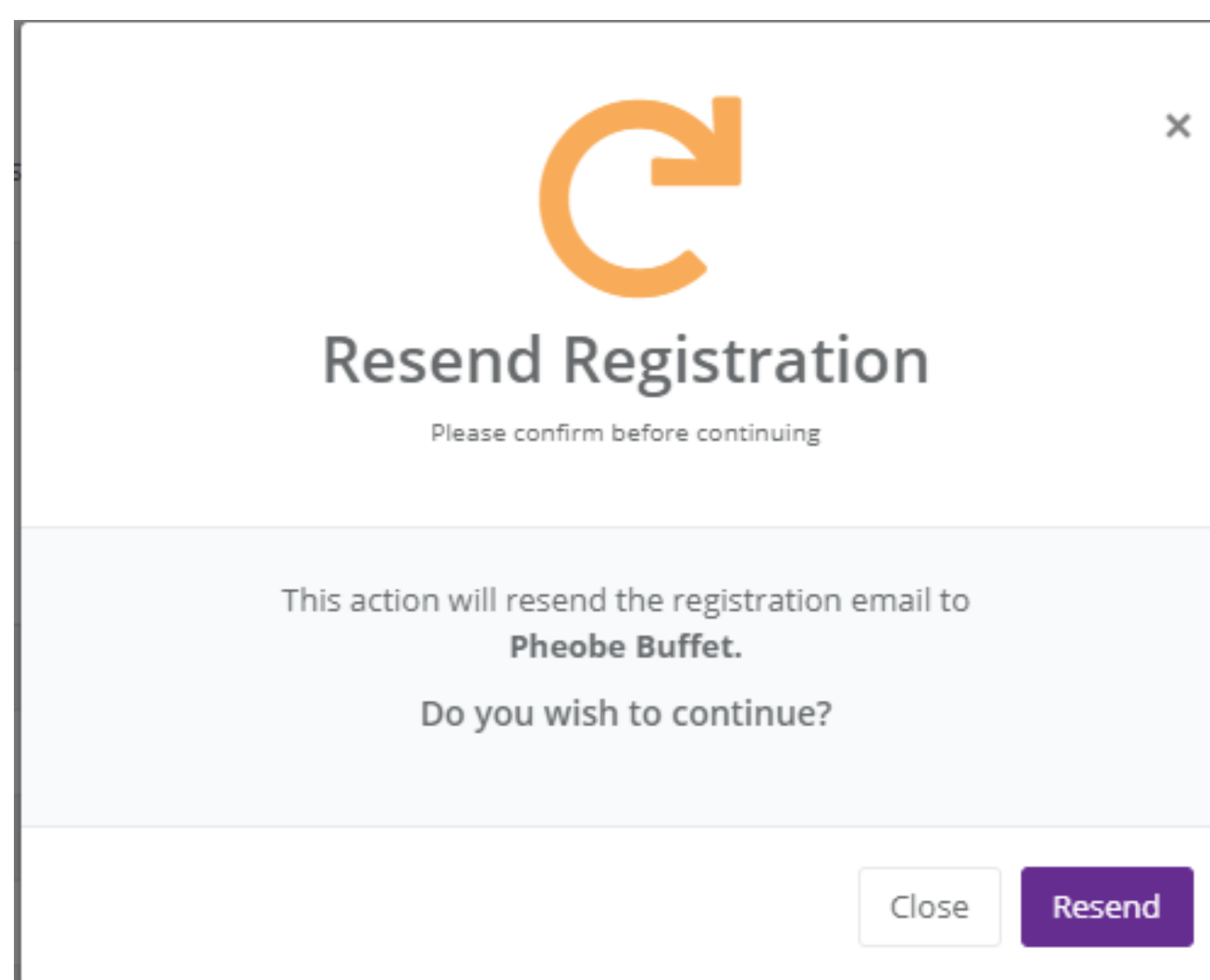
**Step 1: Click on Request Services and Select Pending Requests**



**Step 2: Find the Employee/Candidates name on the roster and click on the orange arrow to resend the registration.**

|  |  |           |         |         |                      |           |           |            |  |
|--|--|-----------|---------|---------|----------------------|-----------|-----------|------------|--|
|  |  | 4/26/2021 | Lindsey | Craig   | Vaccine Series       | 6/10/2021 | 5/10/2021 | Daisy Corp |  |
|  |  |           | Buffet  | Pheobe  | Annual Physical Exam |           | 6/21/2021 | Daisy Corp |  |
|  |  |           | Black   | Douglas | Vaccine Series       |           | 6/28/2021 | Daisy Corp |  |
|  |  |           | Leigh   | Reed    | Pre-Placement Exam   |           | 8/9/2021  | Daisy Corp |  |

**Step 3: Confirm that you want to resend the Registration Email.**



**Step 4: Complete!**  
The Registration Email has now been resent



## 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.

## **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.