

Oracle® COVID-19 Patient Monitoring System

Oracle COVID-19 Patient Monitoring System Quick Start Guide



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Preface

This preface contains the following sections:

- [Documentation accessibility](#)
- [Related resources](#)

Documentation accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Related resources

All documentation and other supporting materials are available on the [Oracle Help Center](#).

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Learn more

- [About Oracle COVID-19 Patient Monitoring System](#)
Oracle COVID-19 Patient Monitoring System is a flexible and comprehensive solution for monitoring and improving public health in the United States during the COVID-19 pandemic.
- [About public health surveillance](#)
With the public health surveillance capabilities in Oracle COVID-19 Patient Monitoring System, you can track the population trends for symptoms, exposure, and preventative actions related to COVID-19 by inviting the public to report daily activities.
- [Benefits of Oracle COVID-19 Patient Monitoring System](#)
Federal and state governments asked health organizations to share health data related to the pandemic. Oracle COVID-19 Patient Monitoring System helps you fulfill these requests.
- [Plan your implementation](#)
When preparing to adopt Oracle COVID-19 Patient Monitoring System, spend some time considering what to do with the data that you collect.
- [Get support](#)
You can get help over chat, phone, and email.

About Oracle COVID-19 Patient Monitoring System

Oracle COVID-19 Patient Monitoring System is a flexible and comprehensive solution for monitoring and improving public health in the United States during the COVID-19 pandemic.

Oracle built Oracle COVID-19 Patient Monitoring System in response to the COVID-19 pandemic and donated it to the U.S. Department of Health and Human Services (HHS). The HHS made the product available at no cost to organizations, including hospital systems, insurance providers, universities, senior living facilities, pharmacies, and workplaces.

Oracle COVID-19 Patient Monitoring System allows organizations to track the population trends for symptoms, exposure, and preventative actions related to COVID-19 by inviting the public to report daily activities.

Oracle COVID-19 Patient Monitoring System also allows both the HHS and individual organizations to analyze data:

- The HHS has access to de-identified patient data through Oracle Analytics Cloud. Organizations who are using Oracle COVID-19 Patient Monitoring System don't need to take additional measures to share their data with the HHS since the HHS already has access to this data.
- Organizations that sign a service agreement with Oracle have access to their full data through the robust Oracle Analytics Cloud environment.

- All organizations can use the in-product dashboards, which provide rich data visualizations and reports that help you understand participant engagement, location, symptoms, and more.

About public health surveillance

With the public health surveillance capabilities in Oracle COVID-19 Patient Monitoring System, you can track the population trends for symptoms, exposure, and preventative actions related to COVID-19 by inviting the public to report daily activities.

The public health surveillance capabilities help organizations and the US Department of Health and Human Services (HHS) understand the socio-demographic, behavioral, and clinical risk factors for contracting COVID-19. Organizations can work in the system as long as they have a medical monitor who can periodically review the data for anomalies and act on the data.

To collect data from their communities, an organization invites individuals who haven't been clinically diagnosed with COVID-19 to participate. The participants report their daily symptoms, health-seeking behaviors and treatments, COVID-19 contact, and use of personal protective equipment.

Adults complete the adult daily update, and pediatric participants complete the pediatric daily update. Each organization can decide whether pediatric participants switch to the adult daily update upon turning 18. Adult caregivers can complete daily updates on behalf of children, adolescents, and anyone who is incapable of completing their own updates. Individuals with caregivers can complete their own daily updates if they want.

Each participant receives a request to share a daily health update by email, text, or both. Participants can quickly access the system and use a device of their choice, including a mobile phone, tablet, laptop, or desktop computer. And, they do not need to remember a user name or password to access their daily update. They just select the link in the request and answer a short list of questions. Most participants complete the questionnaires in a minute or two. Participants who consistently complete their questionnaires receive recognition through reporting streaks.

Benefits of Oracle COVID-19 Patient Monitoring System

Federal and state governments asked health organizations to share health data related to the pandemic. Oracle COVID-19 Patient Monitoring System helps you fulfill these requests.

Here are the top reasons to use Oracle COVID-19 Patient Monitoring System to fulfill data requests on the pandemic.

1 EMRs and EHRs weren't designed for this task

EMRs and EHRs were not designed for sharing data related to the pandemic, but Oracle COVID-19 Patient Monitoring System was designed for it. The government asked health organizations to provide a specific set of information, including patient symptoms, contacts, adherence to guidelines, and an explicit confirmation that a person has zero symptoms. An EMR or EHR is unlikely to capture all of this information. And even if your EMR or EHR collects the data that the government

requested, obtaining this information from an EMR or EHR is both difficult and costly. On the other hand, Oracle COVID-19 Patient Monitoring System collects exactly the information set that the government requested.

2 It's a pleasure to use

Oracle COVID-19 Patient Monitoring System uses an intuitive design so you can quickly navigate through data. Oracle COVID-19 Patient Monitoring System not only collects the data that the government requested, but also offers an intuitive user interface. New users typically can start working within minutes.

3 You can monitor your populations efficiently

You can access health information to monitor your populations efficiently. Individuals with a medical oversight role for the system can access health information for the populations that they know so they can monitor them and provide the right care.

And, unlike other health systems that have years-long implementations and require hours of administrative work, Oracle COVID-19 Patient Monitoring System lets you get up and running quickly. With automated daily updates for participants, medical safety officers can focus on analyzing data rather than soliciting it.

4 It's a no-cost solution

Organizations can use Oracle COVID-19 Patient Monitoring System for free. Oracle donated Oracle COVID-19 Patient Monitoring System to the U.S. government and it made this product available to organizations for free. The data collected belongs to the U.S. government, but you can request your data at any time.

5 Practitioners receive government incentives for participating

The U.S. government awards MIPS (Merit-based Incentive Payment System) credit to practitioners who work in Oracle COVID-19 Patient Monitoring System. These incentives improve a practitioner's credibility and show that they are contributing to research. MIPS credit is especially beneficial to practitioners who work at accountable care organizations.

Contributing to research and getting credit for it? Now that's something that every practitioner can get behind.

Plan your implementation

When preparing to adopt Oracle COVID-19 Patient Monitoring System, spend some time considering what to do with the data that you collect.

Expect attentive service from your Oracle Customer Success manager, who is your planning and implementation partner. They walk you through every step of the planning process and ensure a successful and effective implementation for your organization.

Here are some questions to consider as you prepare for conversations with your Oracle Customer Success manager.

1. Which populations do you want to monitor?

When planning your implementation, start by thinking about the populations that you want to monitor. For example:

- If your organization is a hospital system, do you want to monitor just patients of a single hospital? Patients of multiple hospitals? What about employees and employees' families?
- If your organization is a drug store chain, do you want to monitor just pharmacy customers? All customers? What about employees and their families?
- If your organization offers elder care, do you want to monitor just assisted living residents, or all residents? What about caretakers, administrative, and other staff?

The populations that you identify are the participants that you add to Oracle COVID-19 Patient Monitoring System. You need contact information for the participants, including their first and last names, email addresses, and ideally their mobile phone numbers, as well as their dates of birth. If caregivers provide details for participants, such as children under the age of 18, you need to collect the same information for the caregivers.

You can start collecting this information at any time.

2. How do you want to analyze the data?

You know the population to monitor. Now it's time to think about how you want to analyze the data that is collected.

For example:

- If your organization is a hospital system, do you want to analyze patient groups separately? For instance, do you want to analyze pediatric, adult, and geriatric patients separately? Or perhaps you want to monitor patients by hospital. For example, women and children patients, emergency patients, and so on. Do you want to analyze employee data separately from patient data? If you're monitoring employees' families, do you want to analyze them as a single group, or do you want them to be divided into multiple groups?
- If your organization is a drug store chain, do you want to analyze pharmacy customers separately from non-pharmacy customers? Do you want to analyze customer data separately from employee data?
- Do you want to analyze participants who have been vaccinated against COVID-19 separately from those who haven't been vaccinated?

Your plans for data analysis drive the method for organizing participants. Your groupings of participants are called entities in Oracle COVID-19 Patient Monitoring System. If you identify your plans for data analysis up front, your Oracle Customer Success manager can ensure that your participants are loaded and grouped into entities that support your data analysis needs. Additionally, the dashboard views in the system will offer curated views into the participant data that is collected.

3. Who is responsible for the populations you're monitoring?

You know the populations that you want to monitor and your plan for analyzing the data. Now it's time to identify your stakeholders:

- The individuals who are responsible for each of the populations. This person or team has the light-touch but critical role of monitoring the population groups. They must periodically review the data for anomalies and then act on the data.
- Any individuals who need to be included or informed. For instance, if a population group has a dedicated practitioner who isn't going to be monitoring the group, the person might want to be informed about the new system, even if their workload isn't going to change.
- The individual who takes responsibility for adding personally identifiable information (PII) into the system and who can grant the system the authority to contact the participants. This individual, typically a corporate attorney or executive sponsor, signs the service agreement on behalf of your organization.

After you identify your stakeholders, we recommend showing them the value that Oracle COVID-19 Patient Monitoring System offers to them and the populations so that you can ensure a successful implementation.

4. Who will implement your vision?

You've identified your participants, determined how to analyze the data, and found the individuals who are responsible for your populations. Now it's time to build a team that implements your vision.

Your team must contain at least one person who works for your organization. You can also involve individuals from the entities in your organization, such as the individual hospitals in a hospital system or individual stores in a drug store chain.

This team is responsible for coming up with a plan for adding your participants to the system, implementing the plan, and interacting with the system going forward. If you've already signed a service agreement, you can start working in your production environment right away. If you haven't signed a service agreement yet, you can get access to a test system, if you'd like.

If you plan to customize the emails that participants and their caregivers receive, you must identify individuals with specialized skills, including the ability to code the HTML for the custom email templates and the ability to translate the custom email templates into Spanish.

Get support

You can get help over chat, phone, and email.

You have the following options for getting support:

- Contact your **organization's help desk** using the email address or phone number on the Home page.
- Contact the **Oracle Customer Support team** using the chat function, which is available in the lower-right on every page, including the Sign In page.

 **Note:**

If you've run into a problem or need help right away, we recommend reaching out using one of these mechanisms rather than contacting your Oracle Customer Success manager.

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Get started

- [Get started with Oracle COVID-19 Patient Monitoring System](#)
After your organization signs a service agreement, your Oracle Customer Success manager creates your organization and entities based on your implementation discussions. Then you start setting up the system to start collecting data.
- [Activate your account](#)
Oracle COVID-19 Patient Monitoring System sends you a welcome message with a link to set a password and activate your account. After you activate your account, you can sign in to the application at any time using a mobile device, tablet, or computer.
- [Add a user at your organization](#)
Your Oracle Customer Success manager adds one coordinator from your organization to Oracle COVID-19 Patient Monitoring System. After that, the first coordinator must add the remaining users to the system. When you add a user, you also assign a role to the user.
- [Add a user at a location](#)
If you need to schedule appointments for participants at specific locations, your Oracle Customer Success manager adds one location administrator to the system. After that, an organization coordinator or location administrator can add more location administrators and location staff users (check-in agents, healthcare workers, processing staff) to a location.
- [Create the emails that participants receive](#)
You can customize the emails that participants receive and preview the messages that you create.
- [Add a participant](#)
Participants provide daily updates. Location administrators or location staff users can also book medical appointments or tests for participants. To request participation, add the participant account data to the system.
- [Add multiple participants](#)
Participants provide daily updates. Location administrators or location staff users can also book medical appointments or tests for participants. To request the participation of multiple participants at once, add their account information to a CSV file and then upload the file to the system.
- [Manage locations](#)
If your organization needs locations (physical places) where participants go for medical appointments, contact your Oracle Customer Support manager. Only your Oracle Customer Support manager can activate the Locations/Schedules option in the Oracle COVID-19 Patient Monitoring System and create one or more locations. Once activated, you can see the Locations/Schedules option in the Home page.

Get started with Oracle COVID-19 Patient Monitoring System

After your organization signs a service agreement, your Oracle Customer Success manager creates your organization and entities based on your implementation discussions. Then you start setting up the system to start collecting data.

To set up the system, you do the following:

1. Activate your account as described in [Activate your account](#).
2. Add users who work in the system as described in [Add a user at your organization](#).
3. Create the email message you want to send to participants as described in [Create custom email templates](#).

Note:

The system includes English and Spanish versions for emails to participants and their caregivers. If you want to change the wording or include your organization's logo, you can create custom messages. You cannot customize the text messages that participants receive.

4. Add participant account data to the system as described in [Add multiple participants](#).

After you add participants, they can start completing daily update surveys and you can start analyzing the data.

Activate your account

Oracle COVID-19 Patient Monitoring System sends you a welcome message with a link to set a password and activate your account. After you activate your account, you can sign in to the application at any time using a mobile device, tablet, or computer.

To activate your account:

1. In your email Inbox, locate the **Welcome to the COVID-19 Patient Monitoring System** message sent from `noreply@covid19-rx.org` or `noreply@bulk.covid19-rx.org`. (The From name can vary if your organization chose a unique name.)

Note:

If you cannot locate the welcome message, check your Spam or Junk email folders. If you find the email, add the sender to your contacts so that future emails reach your Inbox.

2. Scroll to the bottom of the welcome message, and select **Sign In to COVID-19 PMS**.

If more than 36 hours passed since you received the welcome email message, the link expired. Contact the coordinator at your organization who added you to the system and ask that person to send your welcome message again. If an Oracle Customer Success manager added you as the first system user, contact that person to resend your welcome message.

3. Enter your password, then enter it again to confirm it. Select **Set Password**.
Oracle COVID-19 Patient Monitoring System opens.
4. Create a bookmark to the following web address for easy access in the future:
<https://www.covid19-rx.org/>

Add a user at your organization

Your Oracle Customer Success manager adds one coordinator from your organization to Oracle COVID-19 Patient Monitoring System. After that, the first coordinator must add the remaining users to the system. When you add a user, you also assign a role to the user.

Most organizations assign users to a single role: **Organization Coordinator**. A user with this role can make updates that affect the entire organization, including adding entities and participants. For the sake of redundancy, consider having at least one backup organization coordinator.

To add a user at your organization:

1. Along the top, select the **Organization** tab.
2. Below the name of your organization, click the button for the type of user you want to add.
 - **Add Organization Coordinator**
 - **Add Call Center Agent**
 - **Add Test Vendor Agent**
 - **Add Recruiter**
3. Enter the user's email address and click **Next**.



Note:

If you mistyped the email address, click the back button (<) in the lower left and try again.

4. Enter the person's first and last names. The person's mobile telephone number is optional, but enter it if you have it.
5. Select **Add**.

The button text varies, depending on the user you're adding. For example, **Add Coordinator** or **Add Call Center Agent**.

The new user receives their welcome email message within minutes. The user has 36 hours to click the link in the message and specify a password.

If the user cannot locate the email message or lets the link expire before setting a password, you can send the message again.

Add a user at a location

If you need to schedule appointments for participants at specific locations, your Oracle Customer Success manager adds one location administrator to the system. After that, an organization coordinator or location administrator can add more location administrators and location staff users (check-in agents, healthcare workers, processing staff) to a location.

You add the location users under an existing location. For example, if the location administrator, check-in agent, and healthcare worker plan to work from a particular site you added to the system, you add those users to that location.

Note:


You must contact your Oracle Customer Success manager to add locations for an organization. Once that person adds the locations and sets up the different appointment types that can occur there, a location administrator can make changes to the location details and add or remove certain types of appointments. For more information on locations, see [Manage locations](#).

To add a location administrator or location staff user to a location:

1. Select **Locations/Scheduling** from the Home page.

Note:

If you cannot see the **Locations/Scheduling** option on the Home page, contact your Oracle Customer Success manager to activate it.

2. If your organization includes more than one location for appointments, select the location from the drop-down menu of the location icon. The icon is located next to your account name in the product banner. It looks like the location icon you see on maps: 
maps:
3. Select the **Administration** tab.
4. Scroll down to the Users section and select **Add User** on the right to open the Add User dialog box.
5. In the **Email** field, enter the email address of the user.
6. Perform one of the following:
 - If the person works as an administrator for the location (and schedule), select **Location Admin**.
 - If the person schedules appointments, checks in patients when they arrive for appointments, administers the test or medical procedure, or processes the participant record, select **Location Staff**.
7. Select **Next**.
8. Enter the first and last name of the user in the appropriate fields.

If the user already exists in the system, you see a message to ensure that you used the correct email address. If necessary, select **Back** from the top of the dialog box to enter the email address again.

9. Select **Add User**. Within minutes, that user receives a Welcome email message to activate their Oracle Health Management System account.



Note:

If necessary, you can add the same user to another location. To do this, repeat the steps in this procedure. But, select the new location where you want to add the user.

Create the emails that participants receive

You can customize the emails that participants receive and preview the messages that you create.

- [Email templates](#)
You can customize the email messages that participants and caregivers receive, including invitations, reminders, and requests for daily updates.
- [Required placeholder text for email templates](#)
Some placeholder text, which is replaced with a value when an email is sent, is required in custom email templates.
- [Create custom email templates](#)
The system includes English and Spanish versions of email messages for participants and their caregivers. If you want to change the wording or include your organization's logo, you can create custom messages. You can also provide Spanish versions of your custom emails.
- [Preview a custom email template](#)
Make sure you preview your custom email templates so that you can check for typos and other errors.
- [Update a custom email template](#)
You can update your custom email templates at any time. The changes go into effect immediately.
- [Resolve common HTML issues in custom email templates](#)
Custom email templates require beginner-level HTML knowledge. If you want, you can start by using the HTML from a sample email and modify it as needed.

Email templates

You can customize the email messages that participants and caregivers receive, including invitations, reminders, and requests for daily updates.

If you don't provide custom messages, the system sends the default English and Spanish messages.

The system sends the caregiver email templates in the following table only when a caregiver is responsible for completing daily updates on behalf of a participant.

 **Note:**

You cannot customize the text messages that are sent to participants.

Email template	Description	When the message is sent
Caregiver Account Created	Invites a caregiver to make a participant active in Oracle COVID-19 Patient Monitoring System. This email is the invitation email for a new participant who has a caregiver.	The person who uploads the caregiver's details decides: either after adding the participant the caregiver is responsible for, or during the overnight or morning hours for the US Eastern time zone.
Caregiver Daily	Asks a caregiver to complete a daily update for a participant.	Daily and automatically to all active caregivers.
Caregiver On Demand	Asks a caregiver to complete an on-demand survey for a participant.	When a coordinator sends an invitation for completing an on-demand survey.
Caregiver Reminder Daily	Asks a caregiver to complete a daily update for a participant.	When someone such as a coordinator or help desk agent at the organization clicks the Send Reminder Mail link for a participant.
Caregiver Reminder Test Results	Reminds the caregiver that a test result is available for a participant.	On demand, when a user determines that a reminder about test results should be sent.
Caregiver Supplemental	Asks a caregiver to complete a supplemental survey for a participant.	Automatically after a supplemental survey is available.
Caregiver Test Results	Informs the caregiver that a new test result is available for a participant.	When a new test result is added for a participant for whom the person is a caregiver. Only one message is sent, and the message is sent during the overnight or morning hours for the US Eastern time zone.
Participant Account Created	Invites a participant to become active in Oracle COVID-19 Patient Monitoring System. This email is the invitation email for new participants.	The person who uploads the participant's details decides: either immediately after adding the participant, or during the overnight or morning hours for the US Eastern time zone.
Participant Daily	Asks a participant to complete their daily update.	Daily and automatically to all active participants.
Participant On Demand	Asks a participant to complete an on-demand survey.	When a coordinator sends an invitation for completing an on-demand survey.
Participant Reminder Daily	Asks a participant to complete their daily update.	When a user, such as a coordinator or help desk agent at the organization, clicks the Send Reminder Mail link for a participant.
Participant Reminder Test Results	Reminds the participant that a test result is available.	On demand, when a user determines that a reminder about test results should be sent.

Email template	Description	When the message is sent
Participant Supplemental	Asks a participant to complete a supplemental survey.	Automatically after a supplemental survey is available.
Participant Test Results	Informs the participant that a new test result is available.	When a new test result is added for a participant. Only one message is sent, and the message is sent during the overnight or morning hours for the US Eastern time zone.

Required placeholder text for email templates

Some placeholder text, which is replaced with a value when an email is sent, is required in custom email templates.

Placeholder text saves you time and lets you personalize your messages. For instance, rather than typing the phone number for the organization's help desk and risking a typo, you type a variable, and the Oracle COVID-19 Patient Monitoring System uses the phone number that is defined in the system.

The following table describes all the placeholder text.

Placeholder text	Description	Required?
#ENTITY_NAME#	Name of the participant's entity.	No
#GUARDIAN_FIRST_NAME#	First name of a participant's caregiver.	No
#GUARDIAN_FULL_NAME#	Full name of a participant's caregiver.	No
#HIPAA_NOTICE#	Text for the HIPAA notice.	Only in the Account Created email templates
#LOGO#	Your organization's logo.	No
#ORGANIZATION_NAME#	Name of the organization.	No
#PARTICIPANT_FIRST_NAME#	Participant's first name.	No
#PARTICIPANT_FULL_NAME#	Participant's full name.	No

Placeholder text	Description	Required?
#SUPPORT_CONTACT#	<p>Organization or entity's preferred contact method for participants who need support. The options are email, phone, and both.</p> <p>You can set different values for the entities within an organization, and the entity setting overrides the organization setting. For example, consider an organization that has a contact method of phone. Within the organization, Entity A has a contact method of email. Participants in Entity A see the support email address, while participants in Entity B see the support phone number.</p> <p>Reach out to your Oracle Customer Success manager if you have questions about your preferred contact methods or if you need to update them.</p>	No
#SUPPORT_EMAIL# #SUPPORT_PHONE#	<p>Organization or entity's support email address and support phone number.</p> <p>You can set different values for the entities within an organization, and the entity setting overrides the organization setting. For example, if Entity A has a different support phone number from its organization, participants in Entity A see the support phone number for Entity A, not the organization.</p>	Yes. You must include at least one of these placeholder values in every email template. If a participant encounters an issue while completing their daily updates, they'll use this support information to get help.

Create custom email templates

The system includes English and Spanish versions of email messages for participants and their caregivers. If you want to change the wording or include your organization's logo, you can create custom messages. You can also provide Spanish versions of your custom emails.

You need basic HTML skills to create a custom email template. Or, you can work on the template with someone who does. You can also find sample HTML content and tips to fix formatting issues in [Resolve common HTML issues in custom email templates](#).

If you want to provide Spanish versions of the emails, you (or someone who can help you) needs Spanish translation skills.

To create a custom email template:

1. Along the top, select the **Organization** tab.
2. Below the name of your organization, click **Manage Email Templates**.

3. In the upper right below the Organization tab, click **Create Custom Email**.
4. From the **Email Template Type** drop-down, select the email template to customize.

 **Note:**

If you do not see email type you wanted, you already created an email template for it. Select **Cancel** and look for the template under the Email Templates heading.

5. Select **English**.
6. In the **Subject** field, enter the email subject.
7. **Optional:** To see additional guidance for creating the body text, scroll past the **Body** field and expand the following sections:
 - **Email Template Placeholders:** View the optional and required placeholder text for the email template. These [placeholders](#) allow you to include a HIPAA notice, personalize emails with participants' and caregivers' names, and more.
 - **Including HTML:** See the list of supported HTML elements, which you can use to format the appearance of the email body.
 - **Including Hyperlinks:** Learn how to format links for websites, email addresses, and phone numbers.
8. In the **Body** field, enter the body text for the email template.

 **Note:**

To prevent emails from being filtered out by a recipient's spam filter, avoid spelling mistakes in the email text. You also cannot customize all parts of an email message. For example, all emails include an Unsubscribe link. And, some emails contain links for getting started or completing a daily update.

9. **Optional:** If required, provide a Spanish translation of the email by selecting **Spanish** under the **Subject** field. Then provide values for the **Subject** and **Body** fields.

 **Note:**

If you don't provide a Spanish translation of your custom message, the system sends the standard Spanish message to participants who select Spanish as their language preference.

10. Select **Create Custom Email**. The system validates the content and sends the email when needed. If you omitted any required placeholder text, you see an error message and need to modify the content before you can create the custom email.

After you finish creating the email template, you can preview the email as described in [Preview a custom email template](#).

Preview a custom email template

Make sure you preview your custom email templates so that you can check for typos and other errors.

To preview a custom email template:

1. Along the top, select the **Organization** tab.
2. Below the name of your organization, select **Manage Email Templates**.
3. Below Email Templates, locate the email template in the list.
4. To the right of the email template, select **Preview**.
5. Review the message.

 **Tip:**

Select any links you created to ensure they open the expected content.

6. Optional: To view the Spanish translation, select **Spanish** from the top of the page.
7. Close the message.

A preview of the email opens. The preview is an accurate representation of the message.

If you see any issues in the preview, you can make the necessary modifications as described in [Update a custom email template](#). If you need to make changes to the company logo, contact your Oracle Customer Success manager. That person can upload a new image.

Update a custom email template

You can update your custom email templates at any time. The changes go into effect immediately.

To modify a custom email template:

1. Along the top, select the **Organization** tab.
2. Below the name of your organization, select **Manage Email Templates**.
3. In the upper right below the Organization tab, select **Create Custom Email**.
4. Below Email Templates, select the name of the email template you want to update.
5. Update the email as needed. For help completing the fields, scroll past the **Body** field and expand the following sections:
 - **Email Template Placeholders:** View the optional and required placeholder text for the email template. These [placeholders](#) allow you to include a HIPAA notice, personalize emails with participants' and caregivers' names, and more.
 - **Including HTML:** See the list of supported HTML elements, which you can use to format the appearance of the email body.
 - **Including Hyperlinks:** Learn how to format links to websites, email addresses, and phone numbers.
6. Select **Apply Changes**.

Resolve common HTML issues in custom email templates

Custom email templates require beginner-level HTML knowledge. If you want, you can start by using the HTML from a sample email and modify it as needed.

For example, you can copy the contents of the Participant Account Created email template and modify it. The template looks like this:

```
#PARTICIPANT_FULL_NAME#,  
<br>  
<br>  
You are receiving this message because you have agreed to  
participate in the COVID-19 Community Research Partnership study with  
#ORGANIZATION_NAME#.  
<br>  
<br>  
#HIPAA_NOTICE#  
<br>  
<br>  
Click Get Started to confirm your information and answer a few  
questions about how you're feeling today.  
<br>  
<br>  
Thank you for participating in this vital effort. Your experience will  
help the medical community understand more about COVID-19 preventative  
measures and precautions.  
<br>  
<br>  
If you have questions about this research study, you can call  
#SUPPORT_PHONE# or email #SUPPORT_EMAIL#.
```

See the following table for tips on how to resolve common HTML issues in your custom email.

Issue	Solution
I need to insert a line break or two for readability	Insert a line break using the following tag: For instance: This is line 1. This is line 2.
The formatting is extending beyond where I expect	In HTML, every tag has an opening tag, such as , and a closing tag, such as . If you include an opening tag but not a closing tag, your formatting won't look the way you expect. If you're having trouble remembering to close your tags, you might want to download a free text editor, such as Notepad++, that helps you work with HTML code. For example, when you select an opening tag in Notepad++, the closing tag is also selected, so you can quickly check for missing closing tags as you work.

Issue	Solution
My headings are formatted incorrectly	<p>The following heading tags meet most organizations' needs:</p> <ul style="list-style-type: none">• <code><h1>Heading 1</h1></code>: The first-level heading• <code><h2>Heading 2</h2></code>: The second-level heading• <code><h3>Heading 3</h3></code>: The third-level heading• <code><h4>Heading 4</h4></code>: The fourth-level heading <p>Heading 1 is typically the largest-sized text, and each subsequent heading level is smaller in size.</p>
I need to bold or italicize some text	<p>Here are some common formatting tags for bold and italicized text:</p> <ul style="list-style-type: none">• <code>Bold</code>: Text that appears bold.• <code>Strong</code>: Text that typically appears bold and is semantically labeled as stronger than its surrounding text (useful for screen readers).• <code><i>Italics</i></code>: Text that appears italicized.• <code>Emphasis</code>: Text that typically appears italicized and is semantically labeled as more emphasized than its surrounding text (useful for screen readers).
I need to insert a bulleted list	<p>The <code></code> tag inserts an unordered list, and the <code></code> tag represents an entry in the list. For example:</p> <pre><h2>Here is my heading for this section</h2> First entry in the list. Second entry in the list. </pre> <p>You can also nest your lists. For instance:</p> <pre><h2>Here is my heading for this section</h2> First entry in the first-level list. First entry in the second-level list. Second entry in the second-level list. Second entry in the first-level list. </pre>

Issue	Solution
I need to insert a numbered list	<p>You create a numbered list the same way you create a bulleted list, just with a different tag: <code></code> instead of <code></code>. For example:</p> <pre data-bbox="756 373 1370 525"><h2>Here is my heading for this section</h2> First entry in the list. Second entry in the list. </pre> <p>You can also nest your lists, and combine different list types. For instance, in the following example, the first-level list is numbered, and the second-level list is bulleted:</p> <pre data-bbox="756 701 1442 1138"><h2>Here is my heading for this section</h2> First entry in the first-level list. First entry in the second-level list. Second entry in the second-level list. Second entry in the first-level list. </pre>
I need to insert a link to a web page	<p>You don't need to be able to code a link using HTML. Instead, you can use the following markup shortcuts. Replace the italicized text with the appropriate text for the link and URL. The text in brackets appears to in the email, and the text in parentheses is the link.</p> <pre data-bbox="756 1323 1357 1348">[visit our website](https://www.example.com)</pre> <p>For example:</p> <pre data-bbox="756 1398 1386 1453">If you want to learn more, [visit our website] (https://www.example.com).</pre>
I need to insert a link to an email address	<p>Replace the italicized text in the following example with the appropriate email address and text that appears for the email link. The text in brackets appears to in the email, and the text in parentheses is the email address.</p> <pre data-bbox="756 1591 1234 1617">[Email us](mailto:help@example.com)</pre> <p>For example:</p> <pre data-bbox="756 1667 1140 1722">If you need help, [Email us] (mailto:help@example.com).</pre>

Issue	Solution
I need to insert a link to a phone number	<p>Replace the italicized text in the following example with the appropriate phone number and text that appears for the phone number. The text in brackets appears to in the email, and the text in parentheses is the telephone number.</p> <p><i>[Call us at +1.888.555.1212]</i>(tel:888-555-1212)</p> <p>For example:</p> <p>If you need help, <i>[Call us at +1.888.555.1212]</i> (tel:888-555-1212).</p>
I need help inserting placeholder text	<p>Replace the italicized text in the following example with the appropriate introductory text. The text in brackets appears to in the email, and the text in parentheses is the contact information.</p> <p><i>[Call us at #SUPPORT_PHONE#]</i>(tel:#SUPPORT_PHONE#)</p> <p>For example:</p> <p>If you need help, <i>[Call us at #SUPPORT_PHONE#]</i> (tel:#SUPPORT_PHONE#).</p>

Add a participant

Participants provide daily updates. Location administrators or location staff users can also book medical appointments or tests for participants. To request participation, add the participant account data to the system.

This procedure describes how to add a single participant. To add the account data for many participants at once, see [Add multiple participants](#) instead.

After you add a participant, you can send an invitation email immediately or wait for the system to send the invitation overnight or in the morning (using the U.S. Eastern time zone).

If a caregiver provides daily updates for a participant, such as for a participant who is under 18, you can associate the caregiver with the participant when you add the participant.

Note:

The link in the invitation expires after 36 hours. Make sure the invitation arrives at a time when the recipient is likely to check their messages. For example, don't invite people using their work email addresses on a Friday afternoon if they won't check their messages until Monday morning.

To add participant account data:

1. Along the top, select the **Participants** tab.
2. Below the row of tabs, select **Add Participant**.
3. Complete the fields.
 - **Entity:** Select the entity to add the participant to.
 - **First Name** and **Last Name**

- **External Identifier:** Enter the participant's unique identifier from your healthcare system. This value is typically a code that you use to identify the patient across all systems.
 - **Medical Record Number**
 - **Date of Birth**
 - **Default Language**
 - **Test Kit Participant:** Select **Yes** if the participant is willing to receive a test kit in the future.
 - **Store Biospecimen:** Select **Yes** if the participant gave you permission to store their biospecimens.
 - **Future Contact:** Select **Yes** if the participant has given you permission to contact them after their participation in Oracle COVID-19 Patient Monitoring System ends.
 - **Notification Preference:** Select **Email** to send all messages over email; send **Mobile** to send all messages by SMS (text message); or select **Both** for both email and text.
 - **Email and Mobile Phone Number**
 - **Address, City, and Zip**
4. Select **Add Participant**.
 5. In the Responsible Party dialog box, select the person who provides daily updates for the participant--the participant or a caregiver.
 6. Perform one of the following steps:
 - If you selected **Self**, select **Return to Participant Details**.
 - If you selected **Caregiver**, select **Continue** and complete the following steps:
 - a. In the Person Assignment dialog box, enter the caregiver's email address and mobile number. If the caregiver is also a participant, enter the external identifier.
 - b. Click **Next**.
Any existing participants or caregivers who match the information you entered appear below Select Caregiver.
 - c. If you see the caregiver name below Select Caregiver, select **Select** to the left of the caregiver name. Otherwise, select **Add New Caregiver**.
 - d. Review or enter the fields for the caregiver and select **Add Caregiver**.

The system adds the participant (and caregiver if you specified one).

Add multiple participants

Participants provide daily updates. Location administrators or location staff users can also book medical appointments or tests for participants. To request the participation of multiple participants at once, add their account information to a CSV file and then upload the file to the system.

To add the account data for a single participant, see [Add a participant](#) instead of this procedure.

After you upload the file, you can send invitations immediately or later. If you do not send them right away, the system typically sends the invitations during the overnight or morning hours for the U.S. Eastern time zone. Talk to your Oracle Customer Success manager to request a time.

If a caregiver provides daily updates for a participant, such as for a participant under the age of 18, you can associate the caregiver with the participant in the CSV file or after you upload the file.

 **Note:**

The link in the invitation expires after 36 hours. Make sure the invitation arrives at a time when recipients are likely to check their messages. For example, don't invite people using their work email addresses on a Friday afternoon if they won't check their messages until Monday morning.

To add multiple participants at once:

1. Along the top, select the **Participants** tab.
2. Select **Load Participants**.
3. Optional: To learn about the requirements for the CSV file, perform one or both of the following steps:
 - To learn about the columns that you can and must include in the CSV file, click **CSV Format** toward the bottom of the page.
 - To see a sample file that uses the correct format, click **Download Sample**.
4. Build the CSV file according to the guidelines. If you work in the sample file, make sure you remember to remove the rows with placeholder data.

The CSV file can be as large as you want. You don't need to create separate files for each of your entities, but make sure you specify each participant's entity correctly.

 **Note:**

To prevent emails from being sent to a recipient's spam folder, make sure you use the correct email address.

5. After building the CSV file, perform one of the following steps:
 - Drag the file to the drag and drop area.
 - Click **Choose file**, browse to the file, and double-click the file.

Oracle COVID-19 Patient Monitoring System processes and uploads the file. If the file contains a large number of entities, this step could take a little while.

After the file passes the validation review, the Review Participants to Load page appears.

If the file doesn't meet the upload requirements, a list of issues appears for your review. You must correct any errors before you can continue with the upload.

6. At the bottom of the list of participants, select **Load x Participants**, where x is the number of participants that you're loading.

 **Note:**

If you added a large number of participants, this can take several minutes.

7. Choose one of the following:
 - To send invitations right away, select **Send Invitations**.
 - To send invitations during the overnight or morning hours for the US Eastern time zone, select **View Participants**.

The system sends the invitations at the time that you chose. You can see all the new participants immediately on the Participants tab. All the new participants have a status of Pending.

If a participant's link expires, they can contact the support email or phone address that is included in the invitation email and ask to have the invitation resent.

Manage locations

If your organization needs locations (physical places) where participants go for medical appointments, contact your Oracle Customer Support manager. Only your Oracle Customer Support manager can activate the Locations/Schedules option in the Oracle COVID-19 Patient Monitoring System and create one or more locations. Once activated, you can see the Locations/Schedules option in the Home page.

The Oracle Customer Support manager can work with you to set up the location details (such as the name, code, days open, automatic schedule or not, active or not, address, and contact information). This person also sets up the type of appointments you can schedule. You can ask your manager to set up as many locations as your organization needs.

After that, location administrators can edit the location details, add or delete different types of appointments, and add location users. They can also create and manage the schedule. Location administrators and location staff members can schedule and manage appointments, check-in participants, and process the appointment details.

 **Note:**

For more information on adding location users, see [Add a user at a location](#).

- [Manage schedules](#)

As a location administrator, you can create schedules for a specific location and appointment type. The schedule can be used for a single day or within a fixed start and end date. Location administrators and location staff members can schedule and manage appointments, check-in participants, and process the appointment details.
- [Create a schedule for a location](#)

As a location administrator, you can create schedules for a specific location and appointment type. But, your Oracle Customer Success manager sets up the location, type of schedules available, and the different types of appointments you can book.

- [Schedule an appointment](#)
Location administrators and location staff users can schedule different types of appointments for participants. The participant may already exist in the system or you may need to add the participant details before making the appointment. Some schedules allow walk-in appointments or telemedicine appointments.

Manage schedules

As a location administrator, you can create schedules for a specific location and appointment type. The schedule can be used for a single day or within a fixed start and end date. Location administrators and location staff members can schedule and manage appointments, check-in participants, and process the appointment details.

You can also define the duration of each appointment type when you create a schedule and specify the days of the week when you can book appointments. You can determine if you want to conduct some of the appointments in-person and others over the phone. You can also schedule in-person appointments in advance or on-demand (as walk-in appointments).

Create a schedule for a location


As a location administrator, you can create schedules for a specific location and appointment type. But, your Oracle Customer Success manager sets up the location, type of schedules available, and the different types of appointments you can book.

You can create as many schedules as you need. For instance, you may create one schedule for weekdays and another for weekends. Or, you may create one schedule for Mondays and Wednesdays, another schedule for Tuesdays and Thursdays, and another for Fridays. Just make sure that one schedule does not overlap with another. To create a schedule for a location:

1. Select **Locations/Scheduling** from the Home page.

 **Note:**

If you cannot see the **Locations/Scheduling** option on the Home page, contact your Oracle Customer Success manager to activate it.

2. If your organization includes more than one location for appointments, select the location from the drop-down menu of the location icon. The icon is located next to your account name in the product banner. It looks like the location icon you see on maps: 
maps:
3. Select the **Schedules** tab.
4. Select **Manage Schedules**. Then select **Create a Schedule** from the left of the page.
5. From the **Appointment Type** drop-down menu, select the appointment type for the schedule by selecting the appropriate row from the table. Each appointment type indicates if you can also schedule walk-in or telemedicine appointments. (If you do not see the appointment type you need, contact your Oracle Customer Support manager.)
6. Enter a name for the schedule (for example, Weekday Schedule).

7. Do one of the following:
 - Select **This schedule has fixed start and end dates** to set up the start and end dates of the schedule using the calendar icons.
 - Select **This is a repeating schedule** to set the start date of the schedule using the calendar icon.
8. In the Duration and Daily Availability section, complete the following fields:
 - **Appointment Duration:** Select the amount of time that the location requires for each appointment.
 - **Schedule Days:** Select the day or days that apply to the schedule. Clear any days you do not want to include.
9. In the Hourly Availability section, enter shift information:
 - **Timing 1:** Enter the start and end time of the first shift, as well as the number of concurrent appointments that the location can support during the shift. For instance, if the location has 3 nurses or technicians working during the shift and they can conduct appointments simultaneously, enter 3.
 - **Timing 2:** Enter the start and end time and enter a number for any concurrent appointments.
After you enter a value for Timing 2, a row appears for **Timing 3**. You fill in the shift details in order because the end time of a shift determines the start times that you see for the next shift.
 - Complete shift details for up to four shifts (Timing 4).
If you make a mistake, choose a new value or remove the shift by selecting **X** at the end of the row.
10. Select **Preview Schedule** to open the Preview Schedule page.

 **Note:**

If the schedule overlaps with any other schedules, a warning appears at the top of the page. If you skipped a required field, you see an error message. Scroll up and make any necessary corrections to the appropriate field. Then select **Preview Schedule** again.

11. Review the schedule on the calendar.
12. Perform one of the following steps:
 - If the schedule appears correct, select **Create Schedule**. You see a created schedule message at the top of the page.
 - If you need to make changes to the schedule, select **Back** from the top of the page and make the necessary edits.

Schedule an appointment


Location administrators and location staff users can schedule different types of appointments for participants. The participant may already exist in the system or you may need to add the participant details before making the appointment. Some schedules allow walk-in appointments or telemedicine appointments.

To schedule an appointment for a participant:

1. Select **Locations/Scheduling** from the Home page.

 **Note:**

If you cannot see the **Locations/Scheduling** option on the Home page, contact your Oracle Customer Success manager to activate it.

2. If your organization includes more than one location for appointments, select the location from the drop-down menu of the location icon. The icon is located next to your account name in the product banner. It looks like the location icon you see on maps: 
maps:
3. Select the **Participants** tab.
4. Do one of the following:
 - For an existing participant (in the system): Enter some identifying data on the participant in one or more of the fields and select **Search**. For example, you can enter the last name, zip code, date of birth, or contact information.
 - For a new participant (not in the system): Select **Add Participant** from the top of the page. Then enter the field information (name, identifier, date of birth, language, test kit participant, contact information, and address) and select **Add Participant**.
5. Select the name of the participant who needs the appointment.
6. Select **Schedule Appointment**.
7. Select the appointment type from the **Appointment Type** drop-down menu (if necessary). Each appointment type indicates if you can also schedule walk-in or telemedicine appointments.
8. Use the calendar icon to select the date. You see the available time slots appear under the date.
9. Select a time slot and select **Next**.
10. Review the appointment details and select **Make Appointment**. You see a success message at the top of the screen.
11. Review the schedule on the calendar and check the date. You see details on the type of appointment and time that you booked.

The participant receives a notification message using the contact method (email, text, or both) with details on the appointment.

3

Next steps

After loading participant data into the system, participants get the invitations to participate. You can then start collecting data on participant engagement, analyzing participant data, and add additional participants.

Get information about participant engagement

To view metrics about participants' activity and statuses or see the symptoms that patients report, open the Dashboard tab. For details about the information that you can get from the dashboards, see *Descriptions of dashboard charts*.

Add additional users

You might want to add additional users who work for the organization or who work for a single entity.

The product offers organization-level roles for people who work at your call center, people who work at the test vendor, and people who help improve participant engagement. For details about adding these users, see *Add a user at your organization*.

Additionally, the product offers entity-level roles for people who work at or are responsible for the participants in an entity. Assigning these roles is optional. If your organization wants to share some of the administrative tasks with employees at each entity, you can add those users now. For details, see *Add a user at an entity in the Oracle COVID-19 Patient Monitoring System User Guide*.

Learn about other tasks that you can perform

See *Learn more the Oracle COVID-19 Patient Monitoring System User Guide*.