

Oracle® COVID-19 Patient Monitoring System

Oracle COVID-19 Patient Monitoring System User Guide



F39727-01
March 2021



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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](#).

1

Learn more

Spend a few moments familiarizing yourself with all the ways that Oracle COVID-19 Patient Monitoring System can help with monitoring populations, understanding risk factors, and 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.
- [Survey options](#)
In addition to the daily update, which most participants complete, you can create one or more additional custom surveys for some or all participants.
- [Tour the product](#)
Oracle COVID-19 Patient Monitoring System helps you find what you need quickly by sorting the information into logical categories and actions.
- [Tour the dashboard](#)
The dashboard provides several pages of robust visualizations, including time series charts, pie charts, and map charts, which help you understand participant engagement, locations, symptoms, and more.
- [Read the Release Notes](#)
You can learn about the changes in a release from within Oracle COVID-19 Patient Monitoring System. Just expand the **Help** menu, and select **Release Notes**.
- [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. Organizations can also include locations with schedules to book appointments for participants who need COVID-19-related tests or procedures.

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.

Survey options

In addition to the daily update, which most participants complete, you can create one or more additional custom surveys for some or all participants.

The surveys in Oracle COVID-19 Patient Monitoring System offer powerful insights into the events that are happening in your participants' lives. And because every survey is backed by its own database, data analysis is easy and fast. For instance, you can collect participant information over a weekend and produce reports and graphics on the data when you return to work on Monday.

Keep reading to learn more about the survey options, including their types, levels, and frequency.

Survey types

Type of survey	Person who completes it	Description
Standard daily	Participant	Oracle maintains the questions in the standard daily survey. Most participants complete this daily update.
Custom daily	Participant	A custom daily survey lets you customize the questions in the daily update. A participant completes either the standard or custom daily, never both of them.
Supplemental	Participant	A supplemental survey contains questions that participants complete in addition to the standard or custom daily survey. For example, you can create a supplemental survey to capture information about whether participants participated in non-household gatherings and exercised safeguards during a holiday weekend.

Type of survey	Person who completes it	Description
In-office	Practitioner on behalf of a participant	<p>An in-office survey is a survey that a practitioner completes for a participant, usually as part of an in-office or telehealth visit.</p> <p>Create an in-office survey for information that is best collected from a practitioner in an office situation, such as information that might require medical interpretation.</p> <p>After a practitioner completes the in-office survey for a new participant, you can invite the participant to complete the daily update going forward.</p>
On-demand	Practitioner on behalf of a participant	<p>An on-demand survey is a survey that a practitioner completes for a participant after an event has occurred.</p> <p>Create an in-office survey for information that is best collected from a practitioner in an office situation, such as information that might require medical interpretation.</p>

 **Note:**

Organization coordinators and location users can access in-office surveys of deceased participants and update them, if necessary.

Your Oracle Customer Success manager can help you identify the right survey to use for your data-collection needs.

Survey levels

With the exception of the standard daily survey, which is generally available to all participants, you can create all of the surveys at the following levels:

- Organization: For all participants in the organization.
- Entity: For all participants in one entity.

If you create the same type of survey at multiple levels, the lowest-level survey overrides any higher-level surveys. For example, if you create two supplemental surveys, one for the organization and another for Entity A, participants in Entity A complete the entity-level supplemental survey, while participants in Entity B complete the organization-level survey.

These different survey levels allow you to collect targeted information from your population groups. For instance, consider a scenario in which you move individuals who have been vaccinated against COVID-19 into a separate entity. (An entity is

a group of participants.) You might create a custom daily survey for the vaccinated individuals so that you can collect appropriate information from this group and so that participants remain engaged with survey questions that are appropriate for them.

Work with your Oracle Customer Success manager to figure out the appropriate levels for your surveys.

Survey frequency

You determine the frequency of your custom surveys. For example, you might want to send the custom daily survey every other day rather than every day.

You can also determine the start date of your surveys.

Reach out to your Oracle Customer Success manager to learn more about the frequency and start date options for surveys.

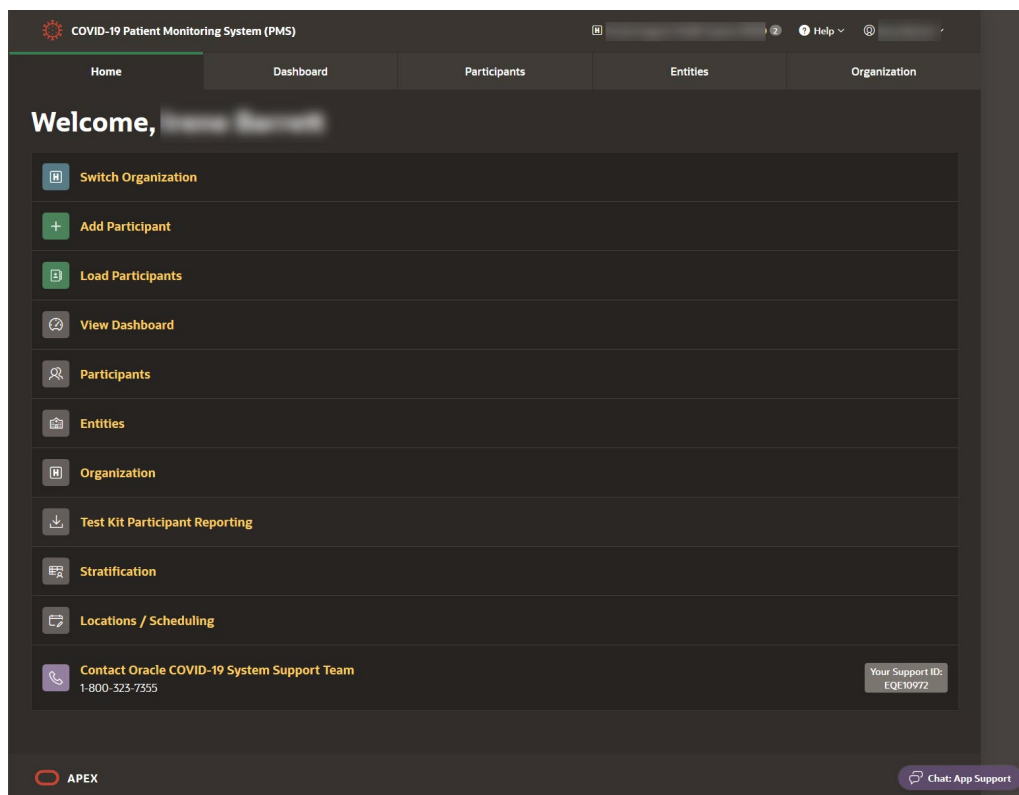
Tour the product

Oracle COVID-19 Patient Monitoring System helps you find what you need quickly by sorting the information into logical categories and actions.

See shortcuts to common tasks

After you sign in, the Home page appears with a list of all the main tasks and categories. This page offers:

- Shortcuts to frequently performed tasks
- Options to contact support, such as by phone, email, and chat.
The phone and email contacts connect you to the Help Desk agents at your organization. The chat connects you to someone in Oracle Support.



Note:

You may not see all the options. For example, if you did not request that your Customer Support manager add locations and schedules to book medical appointments for participants, you do not see the Locations/Scheduling option.

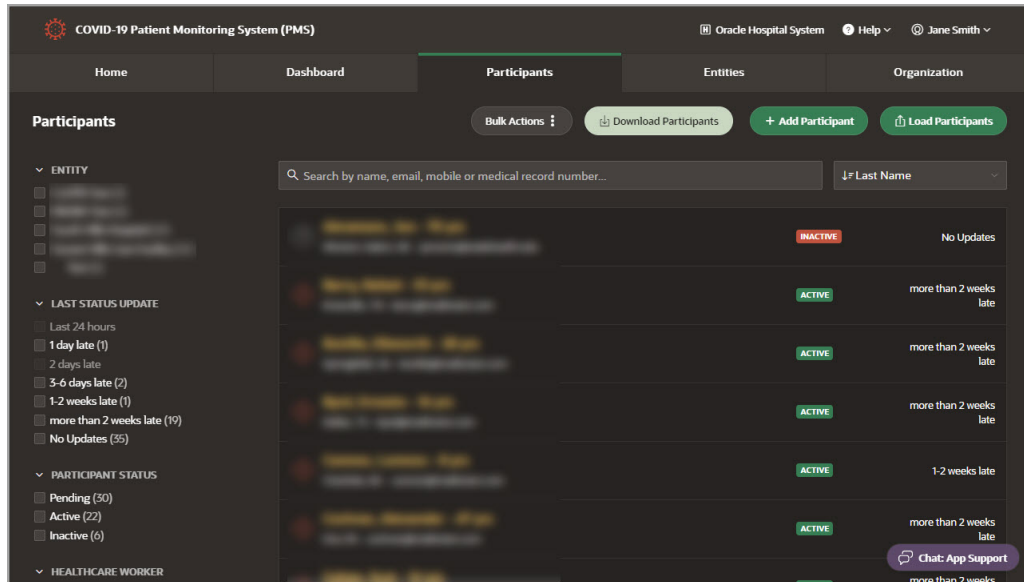
View participant data

If you want to analyze data from participants' daily updates, the Dashboard is where you'll spend most of your time. See [Tour the dashboard](#) for a tour of the rich visualizations that the dashboards provide.

View participants

On the Participants page, you can:

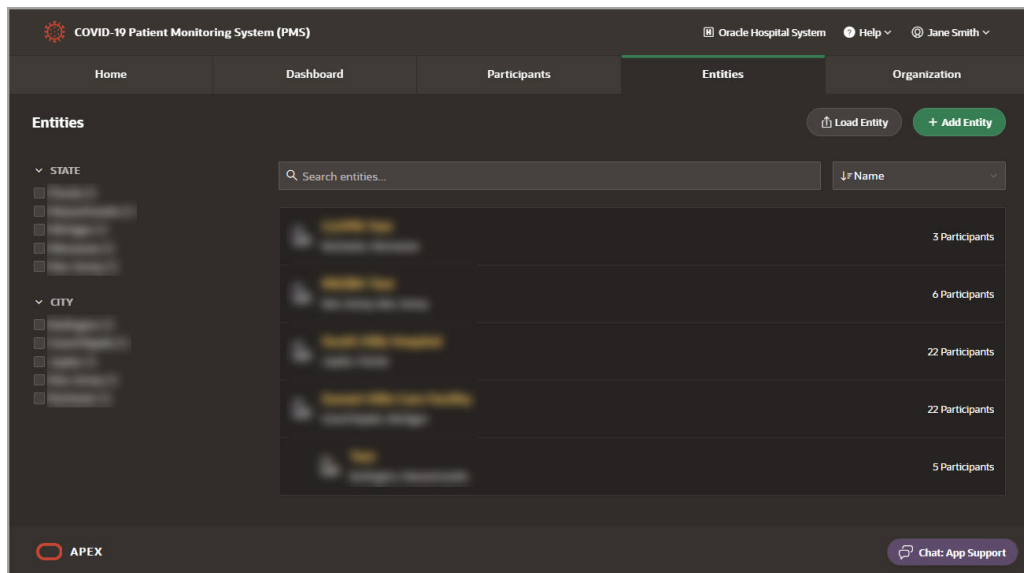
- View the individuals who were invited to provide daily updates, and filter the list by participant status and other information.
- Find a single participant by using the search field above the list of participants.
- Find a cross-section of participants by using the filters along the left.
- See a participant's details, including test results and daily updates, by clicking the participant's name.



View details about your population groups, plus the users who are associated with each population group

On the Entities page, you can:

- View and update your organization's entities.
An entity is group of participants. When your Oracle Customer Success manager works with you to set up your organization, they ask how you want to analyze your data. Your answers determine how participants are grouped in entities.
- View and add users who work at an entity.

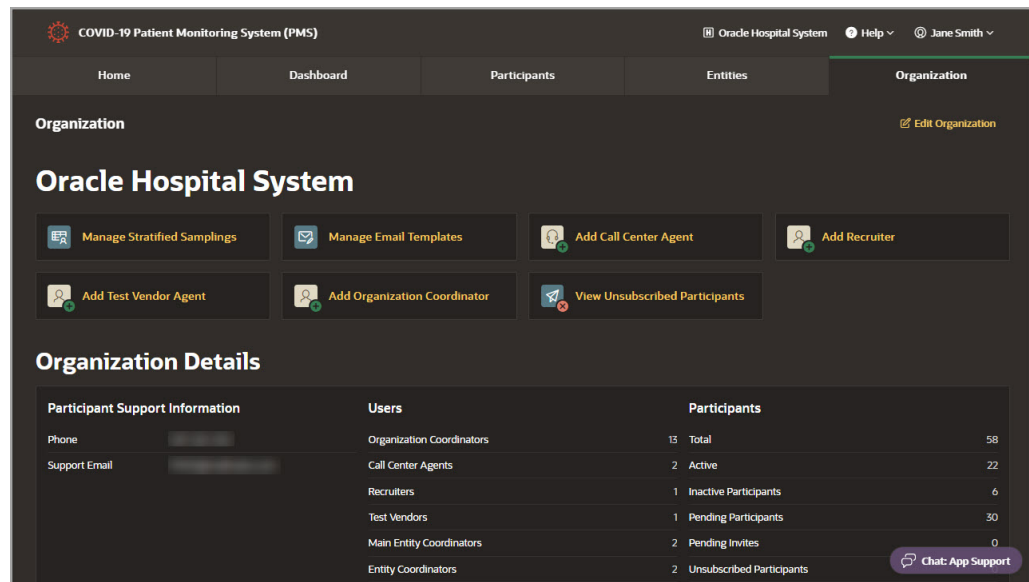


View details about your organization, plus users at the organization

The Organization page is where you:

- View and update information for your organization, including user and participant metrics.

- View and add users.
- Manage your custom email templates.
- View the participants who have unsubscribed.

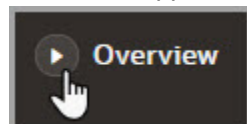


Tour the dashboard

The dashboard provides several pages of robust visualizations, including time series charts, pie charts, and map charts, which help you understand participant engagement, locations, symptoms, and more.

You have several options for learning more about a chart:

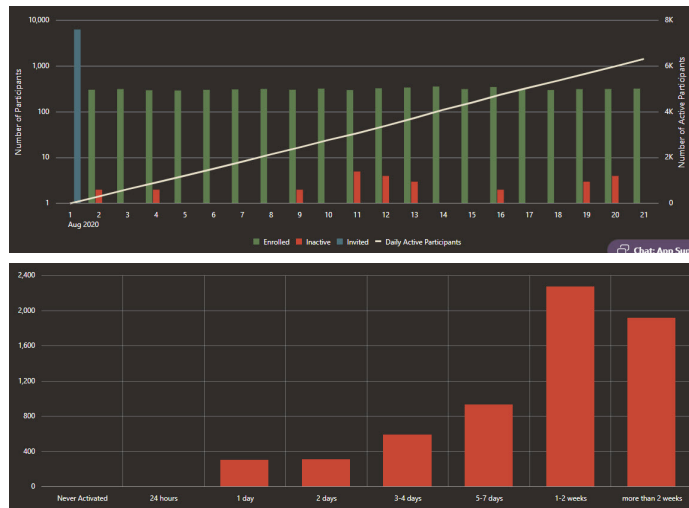
- Click the triangle button that appears before the chart's heading. Descriptions of each chart appear below the heading.



- See [Dashboard charts](#).

Main Dashboard

The [Main Dashboard](#) contains time series charts that help you understand participant engagement and symptoms.

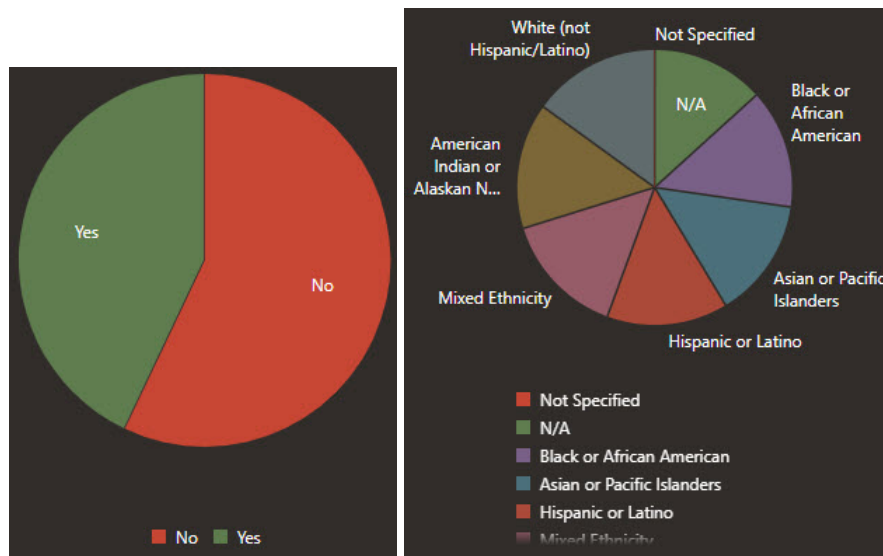


All-Time Dashboard

The [All-Time Dashboard](#) contains metrics about your system since day 1.

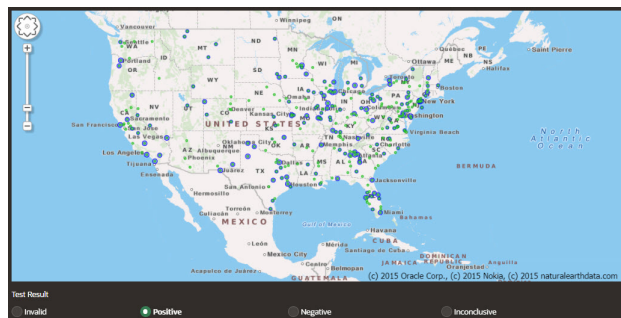
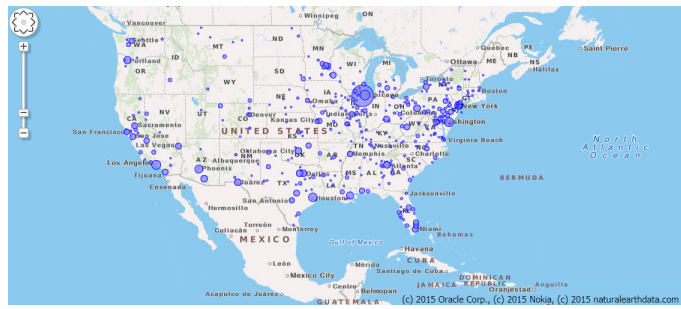
Participant Breakdown

The [Participant Breakdown charts](#) provide an at-a-glance understanding of the populations that you're monitoring. Each pie chart corresponds to a filter on the left.



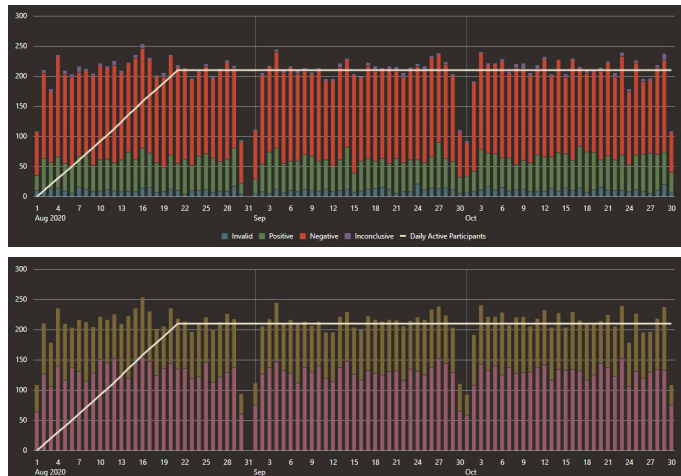
Map Dashboard

The [Map Dashboard charts](#) show you the locations of your participants as well as their test results and symptoms, all on map-based charts.



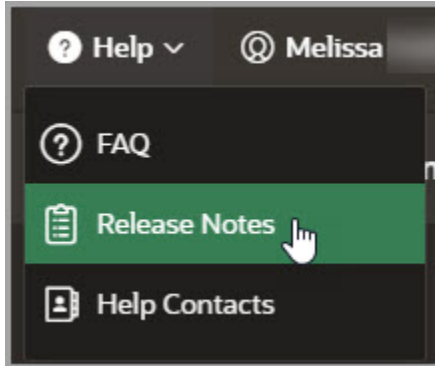
Testing Dashboard

The [Testing Dashboard charts](#) contains time series charts that help you understand participant testing information, including volume of tests, test types, and test results.



Read the Release Notes

You can learn about the changes in a release from within Oracle COVID-19 Patient Monitoring System. Just expand the **Help** menu, and select **Release Notes**.



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.

2

Get started

You can get up and working in just a short period of time.

- [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.
- [Sign in with your account](#)
After you create a password and activate your account, you can sign in at any time using those credentials.

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/>

Sign in with your account

After you create a password and activate your account, you can sign in at any time using those credentials.

For more information on setting a password, see [Activate your account](#).

1. Navigate to the following web site:
<https://www.covid19-rx.org/>
2. Enter your email address and password.
If you forget your password, select **I forgot my password** and follow the prompts to reset it.
3. Select **Sign In**.

3

Users

Users can be associated with either an organization or an entity.

- [Organization roles](#)
Organization roles give users access to information for an entire organization. Some roles also let users see personally identifiable information (PII) and update organization and entity information.
- [Entity roles](#)
An entity role gives a user access to information for a single entity and all of its child entities. Assigning entity roles is optional.
- [Options for medical oversight roles](#)
You must choose at least one person to serve in a medical oversight capacity. You have several options for assigning roles for medical oversight.
- [Location roles](#)
Your Oracle Customer Success manager can create locations where participants go for medical appointments (such as a screenings, blood tests, monoclonal antibody tests) within an organization. A user with the location administrator role can then edit the location details, add appointment types, and add location users who can manage schedules.
- [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 an entity](#)
An organization coordinator or a user at an entity can add the users who work at an entity. 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.
- [Resend a welcome message](#)
If a new user cannot locate the welcome message or the link in the message expired, you can send the message again. The steps you follow to resend the message varies depending on where the user works: for the organization or for an entity within the organization.

Organization roles

Organization roles give users access to information for an entire organization. Some roles also let users see personally identifiable information (PII) and update organization and entity information.

If you need to update a single entity or monitor participant data for a single entity, assign entity roles to the user instead of organization roles. For more information, see [Add a user at an entity](#).

Role	Description
Organization Coordinator	<p>An Organization Coordinator makes updates that affect the entire organization, including adding entities and participants. At least one person must have this role, and we recommend choosing at least one backup.</p> <p>Organization coordinators can also schedule appointments for participants.</p>
Call Center Agent	<p>A Call Center Agent works for the organization's help desk. This person acts as the point of contact for participants who have questions or experience issues with their daily updates.</p> <p>Users with this role have limited access within the system. For instance, they can determine whether a participant is able to provide daily updates, and they can view only some information that participants enter.</p>
Recruiter	<p>A Recruiter determines strategies for identifying, attracting, and retaining participants.</p> <p>Users with this role can view the dashboard and organization details, both of which help them their strategies. They cannot load new participants; the Organization Coordinator performs this task.</p>
Test Vendor Agent	<p>A Test Vendor Agent works at a testing or laboratory facility that supplies an organization with testing materials. They are an organization's point of contact at the vendor.</p> <p>Users with this role can see:</p> <ul style="list-style-type: none"> • Personally identifiable information for only the participants who receive testing materials from the person's testing or laboratory facility. Access to this information allows these users to identify the participants who require tests and provide the testing materials to the participants. • Users with this role can also see the limited information that they need to support vendor testing on the dashboard and information related to entities and the organization.

Entity roles

An entity role gives a user access to information for a single entity and all of its child entities. Assigning entity roles is optional.

Organizations that don't assign entity roles usually choose a small group of people who perform all tasks and monitor all populations on behalf of the organization.

If people are responsible for monitoring or otherwise updating one or more entities, you must assign them the appropriate entity roles. You can assign each of these roles to multiple people.

Role	Description
Entity Coordinator	<p>An Entity Coordinator accesses and monitors data associated with the participants in their entity, including viewing and updating participant information for the entity.</p> <p>Entity coordinators can also schedule appointments for participants.</p>

Role	Description
Main Coordinator	<p>A Main Coordinator performs the same tasks as a Entity Coordinator, plus a few more.</p> <p>In addition to the Entity Coordinator tasks, they can update information for the entity and their fellow coordinators and designate the facility's medical oversight officer.</p> <p>When planning your implementation, if you identified individuals who need to be included or informed but who aren't monitoring any population groups, this role is a good fit for them.</p>
Medical Oversight Officer	<p>A Medical Oversight Officer monitors the medical-related information that is collected for that facility and is responsible for the overall activity at the entity.</p> <p>Some organizations decide to give higher-access roles to individuals who perform medical oversight. To learn more about your options, see Options for medical oversight roles.</p>

Options for medical oversight roles

You must choose at least one person to serve in a medical oversight capacity. You have several options for assigning roles for medical oversight.

Consider the following options for people who serve in a medical oversight capacity:

- If one person monitors all populations, assign the Organization Coordinator role to them.
This approach requires the lowest work effort for the organization while concentrating all of the work on a single person.
- If multiple people monitor your populations, choose either of the following options:
 - Assign the Organization Coordinator role to the people who are responsible for medical oversight.
Because everyone with this role has access to all participant data, keep in mind that monitoring work might be duplicated. Your organization might or might not want this redundancy.
 - Assign the Medical Oversight Officer role to each person for the entities that they're monitoring.
People with the Medical Oversight Officer role have access to the participant data only for the entities for which they have the role, with one exception: If someone has the Medical Oversight Officer role for a parent entity, they have access to participant data for its child entities, too.

If you opt for this approach, make sure that you assign the Medical Oversight Officer role for every entity, or you risk leaving some populations unmonitored.

To learn more about the roles, see [Organization roles](#) and [Entity roles](#).

Location roles

Your Oracle Customer Success manager can create locations where participants go for medical appointments (such as a screenings, blood tests, monoclonal antibody tests) within an organization. A user with the location administrator role can then edit

the location details, add appointment types, and add location users who can manage schedules.

The scheduling tasks they can perform depends on their role. See the following table for more details on the location roles. For example, after your Customer Success manager creates an organization, you can request that they add locations. Then, they can and schedule in-person or walk-in appointments. Organizations that don't assign entity roles usually choose a small group of people who perform all tasks and monitor all populations on behalf of the organization.



Note:

You must contact your Oracle Customer Success manager to access the options to create location users and manage schedules. For example, after your Customer Success manager creates an organization, you can request that they add locations where you can schedule different types of appointments using different types of schedules as described in [Locations and Schedules](#).

Role	Description
Location administrator	A location administrator can edit location details, add or delete different types of appointments for a location, add users, and create, close, reduce capacity, or clear a schedule. But, they can also perform all the duties described for a location staff member.
Location Staff Member	A location staff member can be an administrator, check-in agent, or healthcare worker. These users can schedule appointments for participants, check-in participants, call them from the queue, process the appointment, complete the in-house survey (if needed), and cancel the appointment. (Organization and entity coordinators can also schedule appointments for participants [as location staff users].)

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 an entity

An organization coordinator or a user at an entity can add the users who work at an entity. When you add a user, you also assign a role to the user.

To learn about the roles that you assign, see [Entity roles](#).

Users with the Main Coordinator or Medical Oversight Officer role can add any entity user. Users with the Entity Coordinator role can add only other entity coordinators.

To add a user at an entity:

1. Along the top, select the **Entities** tab.
2. Find the entity name in the list and select it.
3. Below the name of the entity, select one of the following:
 - **Add Entity Coordinator**
 - **Set Main Coordinator**
 - **Set Medical Oversight Officer**

4. Enter the user's email address and click **Next**.
5. Enter the user's first and last names. The user's mobile telephone number is optional, but enter it if you have it.
6. Select **Add** or **Set**.

The option text varies depending on the user you add. For example, you can see **Add Coordinator** or **Set Coordinator**.

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. For more information, see [Resend a welcome message to an entity 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.

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.

Resend a welcome message

If a new user cannot locate the welcome message or the link in the message expired, you can send the message again. The steps you follow to resend the message varies depending on where the user works: for the organization or for an entity within the organization.

- [Resend a welcome message to an organization user](#)
If a new organization user cannot locate the welcome email message or the user waited more than 36 hours to set a password and the link in the message expired, you must resend the message. Otherwise, the user cannot activate the account and start using Oracle COVID-19 Patient Monitoring System.
- [Resend a welcome message to an entity user](#)
If a new entity user cannot locate the welcome email message or the user waited more than 36 hours to set a password and now has an expired link, you must resend the message. Otherwise, the user cannot activate the account and start using Oracle COVID-19 Patient Monitoring System.
- [Resend a welcome message to location user](#)
If a new location user cannot locate the welcome email message or the user waited more than 36 hours to set a password and the link in the message expired, you must resend the message. Otherwise, the user cannot activate the account and start using Oracle COVID-19 Patient Monitoring System.

Resend a welcome message to an organization user


If a new organization user cannot locate the welcome email message or the user waited more than 36 hours to set a password and the link in the message expired, you

must resend the message. Otherwise, the user cannot activate the account and start using Oracle COVID-19 Patient Monitoring System.

 **Note:**

If you need to send a welcome email message to an entity user or location user, see [Resend a welcome message to an entity user](#) or [Resend a welcome message to location user](#) instead of this procedure. If you need to send a new invitation to a participant (someone who completes a daily update survey), see [Resend an invitation to a participant](#) instead.

To resend a welcome email message to an organization user:

1. Along the top, select the **Organization** tab.
2. Scroll to the Coordinators section of the page.
3. Locate the user in the list of names and select the **Edit Coordinator** icon  from the end of the row.
4. Select **Re-Send New Account Mail**.

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


Resend a welcome message to an entity user

If a new entity user cannot locate the welcome email message or the user waited more than 36 hours to set a password and now has an expired link, you must resend the message. Otherwise, the user cannot activate the account and start using Oracle COVID-19 Patient Monitoring System.

 **Note:**

If you need to send a welcome email message to an organization or location user, see [Resend a welcome message to an organization user](#) or [Resend a welcome message to location user](#) instead of this procedure. If you need to send a new invitation to a participant (someone who completes a daily update survey), see [Resend an invitation to a participant](#) instead.

To resend a welcome email message to an entity user:

1. Along the top, select the **Entities** tab.
2. Select the name of the entity from the list.
3. Scroll to the Entity Coordinators section.
4. Locate the user in the list of names and select the **Edit** icon  from the end of the row.
5. Select **Re-Send New Account Mail**.

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

Resend a welcome message to location user

If a new location user cannot locate the welcome email message or the user waited more than 36 hours to set a password and the link in the message expired, you must resend the message. Otherwise, the user cannot activate the account and start using Oracle COVID-19 Patient Monitoring System.

 **Note:**

If you need to send a welcome email message to an organization or entity user, see [Resend a welcome message to an organization user](#) or [Resend a welcome message to an entity user](#) instead of this procedure. If you need to send a new invitation to a participant (someone who completes a daily update survey), see [Resend an invitation to a participant](#) instead.

To resend a welcome email message to a location user:

1. From the **Home** tab, select **Locations/Scheduling**.
2. Select the **Administration** tab.
3. Scroll to the Users section of the page.
4. Locate the user in the list of names and select the name to open the User Details - COVID-19 Patient Monitoring System - Location/Scheduling dialog box.
5. Select **Re-Send Registration Email**.

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

4

Email templates and text messages

You can customize the emails that participants receive and preview the messages that you create. You cannot customize text messages.

- [Text messages](#)
Participants can choose to receive text message requests, reminders, and notifications from Oracle COVID-19 Patient Monitoring System. Your organization cannot customize the text messages.
- [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.

Text messages

Participants can choose to receive text message requests, reminders, and notifications from Oracle COVID-19 Patient Monitoring System. Your organization cannot customize the text messages.

The following table lists the English text messages that Oracle COVID-19 Patient Monitoring System sends to participants. Information in brackets is a tappable link that opens the system.

Category	Event	Text message
Account created	Automatic invitation to a new participant to start completing daily updates	Welcome to Oracle COVID-19 Health Management System [Get Started]

Category	Event	Text message
Account created	Automatic invitation to a new caregiver to start completing daily updates for a participant	Welcome to Oracle COVID-19 Health Management System [Get Started]
Contact information	Automatic notification that a participant updated their contact information	Your contact information was updated in the Oracle COVID-19 Health Management System
Contact information	Automatic notification to a participant that a system user updated the participant's contact information	Your contact information was updated in the Oracle COVID-19 Health Management System
Contact information	Automatic notice that a caregiver updated the contact information for a participant in their care	Contact information was updated for someone in your care in the Oracle COVID-19 Health Management System
Contact information	Automatic notification to a caregiver that a system user updated the contact information for a participant in their care	Contact information was updated for someone in your care in the Oracle COVID-19 Health Management System
Daily update	Automatic request to a participant to complete the daily update	Please complete your daily COVID-19 update [Add Daily Update]
Daily update	User-generated reminder to a participant to complete the daily update	Reminder: Please complete your COVID-19 update [Add Daily Update]
Daily update	Automatic request to a caregiver to complete the daily update for a participant	Reminder: Please provide a COVID-19 update [Add Daily Update]
Daily update	User-generated reminder to a caregiver to complete the daily update	Reminder: Please provide a COVID-19 update [Add Daily Update]
On demand survey	Automatic request to a participant to complete an on-demand survey	Reminder: Please complete your COVID-19 update [Add Daily Update]
On demand survey	Automatic request to a caregiver to complete an on-demand survey	Reminder: Please provide a COVID-19 update [Complete Survey]
Supplemental survey	Automatic request to a participant to complete a supplemental survey	Provide more details about your COVID-19 experience [Complete Survey]

Category	Event	Text message
Supplemental survey	Automatic request to a caregiver to complete a supplemental survey for a participant	Provide more details about someone in your care [Complete Survey]
Test results	Automatic notification to a participant that test results arrived from a lab	View your COVID-19 test results [View Results]
Test results	User-generated reminder to a participant to view test results	Reminder: View your COVID-19 test results [View Results]
Test results	Automatic notification to a caregiver that test results for a participant arrived from a lab	View COVID-19 test results for someone in your care [View Results]
Test results	User-generated reminder to a caregiver that test results for a participant arrived from a lab	View COVID-19 test results for someone in your care [View Results]

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.

Email template	Description	When the message is sent
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.
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
#SUPPORT_CONTACT#	Organization or entity's preferred contact method for participants who need support. The options are email, phone, and both. 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. Reach out to your Oracle Customer Success manager if you have questions about your preferred contact methods or if you need to update them.	No

Placeholder text	Description	Required?
#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>	<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.</p>

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: <code>
</code> For instance: This is line 1. <code>
</code> This is line 2.
The formatting is extending beyond where I expect	In HTML, every tag has an opening tag, such as <code></code> , and a closing tag, such as <code></code> . 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.
My headings are formatted incorrectly	The following heading tags meet most organizations' needs: <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 Heading 1 is typically the largest-sized text, and each subsequent heading level is smaller in size.

Issue	Solution
I need to bold or italicize some text	<p data-bbox="678 275 1378 327">Here are some common formatting tags for bold and italicized text:</p> <ul data-bbox="678 338 1378 583" style="list-style-type: none"><li data-bbox="678 338 1378 369">• <code>Bold</code>: Text that appears bold.<li data-bbox="678 373 1378 457">• <code>Strong</code>: Text that typically appears bold and is semantically labeled as stronger than its surrounding text (useful for screen readers).<li data-bbox="678 462 1378 493">• <code><i>Italics</i></code>: Text that appears italicized.<li data-bbox="678 497 1378 583">• <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 data-bbox="678 600 1378 653">The <code></code> tag inserts an unordered list, and the <code></code> tag represents an entry in the list. For example:</p> <pre data-bbox="678 695 1378 852"><h2>Here is my heading for this section</h2> First entry in the list. Second entry in the list. </pre> <p data-bbox="678 905 1378 936">You can also nest your lists. For instance:</p> <pre data-bbox="678 968 1378 1409"><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="756 369 1370 520"><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 1136"><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 1320 1357 1346">[visit our website](https://www.example.com)</pre> <p>For example:</p> <pre data-bbox="756 1396 1386 1451">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 1593 1235 1619">[Email us](mailto:help@example.com)</pre> <p>For example:</p> <pre data-bbox="756 1669 1138 1724">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>

5

Participants

Participants are the heart of Oracle COVID-19 Patient Monitoring System. Learn how to add them and help them when needed.

- [About participants](#)
Participants are the heart of Oracle COVID-19 Patient Monitoring System. Their daily updates provide valuable data to track the pandemic.
- [Add and view participants](#)
You can add one or many participants at a time. You can also view information about participants at any time.
- [Manage and update participants](#)
Participants are the heart of Oracle COVID-19 Patient Monitoring System. Learn how to help them be successful with their daily updates.
- [Send reminders to participants](#)
You can resend a new participant's invitation. You can also remind participants to complete a daily update or view their test results.
- [Manage subscriptions and end participation](#)
Participants can unsubscribe and resubscribe to emails, and they can pause, end, and resume their participation.

About participants

Participants are the heart of Oracle COVID-19 Patient Monitoring System. Their daily updates provide valuable data to track the pandemic.

- [Workflow for new participants](#)
After participants receive invitations to participate in daily health update surveys, they can start participating within minutes.
- [Participant statuses](#)
A participant's status offers at-a-glance information about the participant's engagement.
- [Pediatric participants](#)
Either pediatric participants or their caregivers can complete their daily updates. You decide whether pediatric participants change from the pediatric daily update to the adult daily update when they turn 18.

Workflow for new participants

After participants receive invitations to participate in daily health update surveys, they can start participating within minutes.

The following steps show the workflow for coordinators who add participants and for people who agree to participate:

1. A coordinator adds one or more participants to the system and decides whether to send the invitation now or later. If the coordinator chooses later, the system

typically sends the invitations during the overnight or morning hours for the U.S. Eastern time zone. Coordinators can talk to their Oracle Customer Success managers to request a time.

2. The system sends the invitation at the time the coordinator chose by email, text, or both.
3. The participant clicks or taps the link in the invitation and enters their personal information. Oracle COVID-19 Patient Monitoring System validates their identity and prompts the participant to complete a daily update.
4. The participant completes the first daily update survey.
5. The next day, and every day thereafter, the participant receives a request to complete a daily update.

If participants want to change their participation, they can:

- Unsubscribe to stop receiving all messages, including daily requests for status updates.
- Stop receiving messages temporarily or permanently by contacting the organization's help desk. A help desk agent can pause or end the participation. For more information, see [Pause a participant's participation](#) or [End participant participation](#).

Participant statuses

A participant's status offers at-a-glance information about the participant's engagement.

Status	Description
Active	A participant changes from the Pending status to the Active status after clicking or tapping the link in their invitation and entering their personal information so that Oracle COVID-19 Patient Monitoring System can validate their identity.
Caregiver Only	An individual who is a caregiver to a participant and not a participant themselves has the Caregiver Only status.
Deceased	A participant changes to the Deceased status after they pass away and someone ends their participation. The system doesn't send messages to deceased participants and doesn't include them in the charts on the Dashboard unless you select the option to Share Data. If you select Share Data , you continue to use the data and the participant status appears Active. If you select Exclude Data for a deceased participant, you stop sharing the data and the participant status appears as Inactive.
Failed Validation	A participant changes from the Pending status to the Failed Validation status after clicking or tapping the link in their invitation and entering personal information that doesn't match the information in the system 3 times. Because Oracle COVID-19 Patient Monitoring System isn't able to validate their identity, the participant is locked out until their validation attempts are reset.
Inactive	A participant changes to the Inactive status after their participation ends, typically after they contact the organization's help desk and ask to end their participation.

Status	Description
Paused	A participant changes to the Paused status while their participation is temporarily paused, typically after they contact the organization's help desk and ask to stop receiving daily messages for a period of time.
Pending	A new participant who was added and hasn't started their participation yet has a status of Pending.
SneezSafe	Every participant who is associated with a SneezSafe entity always has a status of SneezSafe. This status appears only on the Dashboard pages.
Unsubscribed	A participant who unsubscribes from messages changes to the Unsubscribed status.

Pediatric participants

Either pediatric participants or their caregivers can complete their daily updates. You decide whether pediatric participants change from the pediatric daily update to the adult daily update when they turn 18.

Keep in mind the following requirements and options for pediatric participants:

- **Pediatric version of the daily update**
All pediatric participants complete the pediatric version of the daily update.

You decide what happens when a participant turns 18: Either they switch over to the adult daily update, or they continue completing the pediatric daily update. Your decision applies to all your pediatric participants. Reach out to your Oracle Customer Success manager to specify this setting.
- **Participants or their caregivers can complete the daily update**
Each organization can specify a minimum age for completing the daily update. When a pediatric participant meets your organization's age requirements for self reporting, the participant and their caregiver must decide whether the caregiver completes the daily update. For instance, older teenagers might want to complete their daily updates themselves.

The person who completes the daily update, either the caregiver or the participant, also receives all messages, including test results and requests to complete the daily update.

You specify whether a caregiver or participant is responsible for daily updates either when you [add the participant](#) or when you [assign a caregiver](#).



Note:

Even if a pediatric participant completes their own daily updates, they should still have a designated caregiver.

Add and view participants

You can add one or many participants at a time. You can also view information about participants at any time.

- [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.
- [View and filter the list of participants](#)
The powerful filters on the Participants tab provide enhanced insight into your participant populations.
- [View participant account details](#)
You can view the account details of a participant through the Participants tab. For example, you can review the date of birth, ethnicity, start date, contact information, and message preferences.
- [View a participant's test results](#)
You can view a participant's test results on the Participants page.

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.

View and filter the list of participants

The powerful filters on the Participants tab provide enhanced insight into your participant populations.

To filter the list of participants:

1. Along the top, select the **Participants** tab.
2. Perform one of the following steps:
 - To find a single participant, enter search criteria in the Search box above the list of participants. You can search by name, email address, mobile telephone number, and external identifier.
 - To see only participants who meet specific criteria, use the following filters on the left:
 - **Entity:** Select one or more entities to see only the participants who are associated with those entities.
 - **Last Status Update:** Select a time frame to see only the participants who provided daily updates within that window.
 - **Participant Status:** Select a status to see only participants with the status.
 - **Healthcare Worker:** Select **Yes** to see only participants who are healthcare workers. Select **No** to exclude healthcare workers.
 - **Test Kit Participant:** Select **Yes** to see only participants who receive test kits. Select **No** to exclude participants who receive test kits.

View participant account details

You can view the account details of a participant through the Participants tab. For example, you can review the date of birth, ethnicity, start date, contact information, and message preferences.

To view participant account information:

1. Along the top, select the **Participants** tab.

2. In the list of participants, find the participant whose information you need to view.

 **Tip:**

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Review the participant's information.

The page shows information about the participant, including:

- Personal information, such as sex, date of birth, and ethnicity.
- Entity-related information, including the participant's entity and external identifier.
- Participant start date and the date of the last notification sent from the system.
- Whether the participant receives test kits.
- Contact information, including email address and mobile telephone number.
- Message preference, such as email, text, or both.
- Dependents of the caregiver, if applicable.
- Daily update information, such as the language and type of daily update (pediatric or adult).

View a participant's test results

You can view a participant's test results on the Participants page.

To view the test results of a participant:

1. Along the top, select the **Participants** tab.
2. In the list of participants, find the participant whose test results you need to view.

 **Tip:**

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Click the participant's name.
4. Scroll to the COVID-19 Tests section, and review the participant's self-reported and vendor-reported tests.

Manage and update participants

Participants are the heart of Oracle COVID-19 Patient Monitoring System. Learn how to help them be successful with their daily updates.

- [Assign a caregiver](#)
When a participant has a caregiver, the caregiver or the participant can provide daily updates. All participants who are under 18 should have caregivers, even if the participants provide their daily updates themselves.

- [Remove a caregiver](#)
When you remove a participant's caregiver, the participant starts receiving all messages and is responsible for providing the daily update.
- [Update participant personal information](#)
You can change a participant's personal information, including their name, email address, and whether they were diagnosed with or hospitalized for COVID-19.
- [Update participant message preferences](#)
Participants can receive messages over email, text, or both. A participant can change the way that they receive messages at any time, or you can make this change for them.
- [Change the entity of a participant](#)
You can change entity of a participant at any time. However, you must contact your Oracle Customer Success manager to change the organization of a participant.
- [Unlock a participant account](#)
Oracle COVID-19 Patient Monitoring System must verify the identity of participants when they respond to a daily update invitation by entering their personal data. A participant can attempt to enter their personal information up to three times before Oracle COVID-19 Patient Monitoring System locks them out. Once a participant gets locked out, you must reset the account so the participant can try again.

Assign a caregiver

When a participant has a caregiver, the caregiver or the participant can provide daily updates. All participants who are under 18 should have caregivers, even if the participants provide their daily updates themselves.

You can assign a caregiver when you add a participant or at any time afterward. The following procedure describes how to add a caregiver to a participant you already added. (For details on adding new participants, see [Add multiple participants](#).)

To assign a caregiver to an existing participant:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant who requires a caregiver.

Tip:

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Select the participant's name.
4. Below the participant's name, in the row of buttons, select **Add Caregiver**.
5. Complete the following fields:
 - **External Identifier for existing participant:** If the caregiver is already a participant in Oracle COVID-19 Patient Monitoring System, enter their external identifier from the system.
 - **Email:** Enter the caregiver's email address.
 - **Mobile:** Enter the caregiver's mobile telephone number.
6. Click **Next**.

If any information that you entered matches one or more participants, they are listed in a table.

7. Perform one of the following steps:
 - If the caregiver appears in the table, select **Select** in the left column for the individual.
 - If no table appears, or a table appears without listing the caregiver, select **Add New Caregiver**.
8. Update or complete the following fields:
 - **First Name** and **Last Name**: Update the person's name, if needed.
 - **Responsible Party for Participant**: Choose **Self** if the participant receives all messages and completes their own daily updates. Choose **Caregiver** if the caregiver receives all messages and completes daily updates on behalf of the participant.
9. Select **Add Caregiver**.

The caregiver is now associated with the participant and receives all messages going forward. When the caregiver selects the link in the request to complete a daily update, the caregiver must provide one-time information so that the system can verify the information. Afterward, the caregiver can complete the daily update.

Remove a caregiver

When you remove a participant's caregiver, the participant starts receiving all messages and is responsible for providing the daily update.

If a participant is under 18, do not remove the caregiver even if the participant completes the daily update.

To remove the caregiver of a participant:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant who no longer requires a caregiver.

Tip:

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Select the participant's name.
4. Below the participant's name, in the row of buttons, select **Remove Caregiver**.
5. Review the fields and confirm that you selected the correct the caregiver of the correct participant.
6. Select **Remove Caregiver**.

The system now sends all messages to the participant.

Update participant personal information

You can change a participant's personal information, including their name, email address, and whether they were diagnosed with or hospitalized for COVID-19.

 **Note:**

A participant can update their email address, mobile number, mailing address, and preferred contact method from the Thank You page that appears after they complete their daily update.

To update participant account data:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant with the information you need to update. You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.
3. Select the participant's name.
4. Above the participant's name and to the right, select **Edit Participant**.
5. Update the participant's personal information. For example, you can change the name, external identifier, medical record number, date of birth, language, sex at birth, healthcare worker status, race, ethnicity, or contact information.

 **Note:**

If you change the participant's contact information, the system immediately sends a message over email, text, or both, depending on the participant's preferences. For example, if the participant receives emails and texts and you change the participant's email address, the system sends an email about the update to the original email address and a text to the telephone number (if the number belongs to a smart phone). The message contains information about the change. The email contains the steps to take if the change was made in error.

6. Select **Save Participant**.

Update participant message preferences

Participants can receive messages over email, text, or both. A participant can change the way that they receive messages at any time, or you can make this change for them.

To update the participant message preferences:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant whose message preferences you need to update.

 **Tip:**

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Select the participant's name.
4. Above the participant's name and to the right, select **Edit Participant**.
5. Scroll to the Contact Information section and select a value for **Notification Preference**:
 - **Email**: Participant receives messages only by email.
 - **Mobile**: Participant receives messages only by text.
 - **Both**: Participant receives messages by email and text.

 **Note:**

Provide the appropriate contact information. For example, if you select **Both**, make sure you provide a mobile telephone number and an email address for the participant.

6. Scroll to the bottom of the page and select **Save Participant**.

Change the entity of a participant

You can change entity of a participant at any time. However, you must contact your Oracle Customer Success manager to change the organization of a participant.

If you need to update the entity for many participants, contact your Oracle Customer Success manager.

To change the entity of a participant:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant with the entity you need to change.

 **Tip:**

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Select the participant's name.
4. Below the participant's name, in the row of buttons, select **Transfer Entity**.
5. In the Assign Participant to Entity dialog box, select the participant's new entity from the **New Entity** drop-down menu and select **Assign Entity**.

Unlock a participant account

Oracle COVID-19 Patient Monitoring System must verify the identity of participants when they respond to a daily update invitation by entering their personal data. A

participant can attempt to enter their personal information up to three times before Oracle COVID-19 Patient Monitoring System locks them out. Once a participant gets locked out, you must reset the account so the participant can try again.

Before completing the steps in this procedure, review the personal information with the participant to confirm the system contains the correct details. (Participants see a message to call or email support when they get locked out.) For example, the data uploaded to the system could have included a typographical error that you need to correct before they can try again. Review what the participant wanted to enter with what you see in the system. If you need to make corrections the data in the system before the participant tries again, see [Update participant personal information](#).

To unlock a participant account:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the locked-out participant.

 **Tip:**

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants. Or, you can filter by participants with the Failed Validation status using the filters on the left.

3. Select the participant's name.
4. Below the participant's name, select **Reset Validation Attempts**.

Notify the participant to try again. The participant can select the link in the invitation and enter the personal information again (up to three times). You can also resend the invitation if necessary as described in [Resend an invitation to a participant](#).

Send reminders to participants

You can resend a new participant's invitation. You can also remind participants to complete a daily update or view their test results.

- [Resend an invitation to a participant](#)
If the link in a participant's invitation expires or never arrives, you can resend the invitation.
- [Resend invitations to multiple participants](#)
You can resend invitations to participants who did not respond to their previous invitation.
- [Remind a participant to view their test results](#)
After a lab vendor sends test results to Oracle COVID-19 Patient Monitoring System, the system sends messages to participants so they can view the results. You can also send reminders to participants to view their test results.
- [Remind multiple participants to view their test results](#)
Oracle COVID-19 Patient Monitoring System sends test results to participants. You can also remind many participants at once to view their vendor-reported test results.

- [Remind a participant to complete a daily update](#)
If a participant failed to complete a daily update for several days, weeks, or months, you can send a reminder to complete the update.
- [Remind multiple participants to complete their daily updates](#)
You can send reminders to all participants who haven't completed their daily updates in a while.

Resend an invitation to a participant

If the link in a participant's invitation expires or never arrives, you can resend the invitation.



Note:

Use the following procedure for new participants who complete daily update. If a new user (someone who works in Oracle COVID-19 Patient Monitoring System) needs a new welcome message, see [Resend a welcome message](#) instead of this procedure.

See [Resend invitations to multiple participants](#) instead of this procedure to send the invitation to multiple participants.

To resend the invitation to a participant:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the pending participant who needs the invitation.



Tip:

You can resend an invitation only for a participant with a Pending status. In the list of filters on the left, below Participant Status, select **Pending** so that you see only pending participants. You can also find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Select the participant's name.
4. Below the participant's name, select **Re-Send Invitation Notification**.

The system sends the invitations within a few minutes. If the participant receives emails, the system uses the email address used in the Caregiver Account Created or Participant Account Created template.

Resend invitations to multiple participants

You can resend invitations to participants who did not respond to their previous invitation.

 **Note:**

See [Resend an invitation to a participant](#) instead of this procedure to send the invitation to a single participant.

To resend invitations to multiple users:

1. Along the top, select the **Participants** tab.
2. Below the row of tabs, select **Bulk Actions**. Then select **Re-Send Invitation Emails** from the drop-down menu.
3. In the dialog box, select a value from the **Initial Invitation Sent More Than** drop-down menu.

For example, to resend invitations to participants whose initial invitation was sent more than a month ago, select **1 month ago**.

The Recipients field shows the number of participants who receive the invitations.

4. Select **Send Invitation Emails**.

The system sends the invitations within a few minutes. If the participant receives emails, the system uses the email address used in the Caregiver Account Created or Participant Account Created template.

Remind a participant to view their test results

After a lab vendor sends test results to Oracle COVID-19 Patient Monitoring System, the system sends messages to participants so they can view the results. You can also send reminders to participants to view their test results.

When you send any reminder about test results, a participant who already viewed their test results still receives the message.

 **Note:**

To send a reminder about test results to multiple participants at once, see [Remind multiple participants to view their test results](#).

To remind a participant to view test results:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant to remind.

 **Tip:**

You can find a participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Select the participant's name.
4. Below the participant's name, select **Send Test Results Reminder**. (You only see this option for participants with vendor-reported test results. Scroll to the COVID-19 Tests section to see if the participant has vendor-reported test results.)
5. Select **Send Test Result Emails**.

The system sends a reminder within a few minutes. If the participant receives emails, the system uses the email address used in the Caregiver Test Results Reminder or Participant Test Results Reminder template.

Remind multiple participants to view their test results

Oracle COVID-19 Patient Monitoring System sends test results to participants. You can also remind many participants at once to view their vendor-reported test results.

When you send a reminder about test results, everyone who received test results within the time window you select receives the message, including participants who have already viewed their test results.

 **Note:**

To send a reminder about test results to a single participant, see [Remind a participant to view their test results](#).

To remind multiple participants at once to view their test results:

1. Along the top, select the **Participants** tab.
2. Below the row of tabs, select **Bulk Actions**. Then select **Re-Send Test Result Emails** from the drop-down menu.
3. In the Re-Send Test Results dialog box, select a value from the **Initial Test Result Sent More Than** drop-down list.

For example, to send a reminder to participants who received their initial test results two days ago, select **2 days ago**. To send a reminder to participants who received their initial test results a month ago, select **1 month ago**.

The Recipients field shows the number of participants who receive reminders.

4. Select **Send Test Result Emails**.

The system sends a reminder within a few minutes. If the participant receives emails, the system uses the email address used in the Caregiver Test Results Reminder or Participant Test Results Reminder template.

Remind a participant to complete a daily update

If a participant failed to complete a daily update for several days, weeks, or months, you can send a reminder to complete the update.

The reminder is in addition to the request that a participant receives for completing a daily update. To send a reminders to many participants at once, see [Remind multiple participants to complete their daily updates](#).

To send a reminder to a participant to complete a daily update:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant to remind.

 **Tip:**

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Select the participant's name.
4. Below the participant's name, select **Send Status Update Reminder**.

The system sends a reminder within a few minutes. If the participant receives emails, the system uses the email address used in the Caregiver Reminder on Demand or Participant Reminder on Demand template.

Remind multiple participants to complete their daily updates

You can send reminders to all participants who haven't completed their daily updates in a while.

The reminder is in addition to the reminder that a participant receives for a daily update. To send a reminder to a single participant, see [Remind a participant to complete a daily update](#).

To send a reminder to multiple participants to complete their daily updates:

1. Along the top, select the **Participants** tab.
2. Below the row of tabs, select **Bulk Actions**. Then select **Send Reminder Emails** from the drop-down menu.
3. In the dialog box, select a value from the **Last Participant Update** drop-down list.

For example, to send a reminder to participants who haven't completed a daily update in more than two weeks, select **More than 2 Weeks Late**. The Recipients field shows the number of participants who receive the reminder.

 **Note:**

To see the list of affected participants, select **Cancel** in the dialog box and apply the appropriate **Last Status Update** filter to the Participants page.

4. Select **Send Test Result Emails**.

The system sends the reminders within a few minutes. If the participant receives emails, the system uses the email address used in the Caregiver Reminder on Demand or Participant Reminder on Demand template.

Manage subscriptions and end participation

Participants can unsubscribe and resubscribe to emails, and they can pause, end, and resume their participation.

- [Resubscribe a participant](#)
An unsubscribed participant must call the organization's help desk if they want to resubscribe. Then, the help desk agent can resubscribe them.
- [Pause a participant's participation](#)
You can pause the daily update messages for participants who cannot provide daily updates or need to stop for a set amount of time. For example, the participant can call the organization help desk and request this action.
- [Remove a participation pause](#)
If a participant is ready to resume daily updates before the participation pause end date, you can end the pause period early.
- [End participant participation](#)
An agent for the organization's help desk can end a participant's participation. For example, if a participant passes away or just wants to stop completing daily updates, you can end the participation for that participant.
- [End participation for multiple participants](#)
You can end participation for people who never provided a daily update or did not provide one for an extended period of time.
- [Resume participant participation](#)
Participants who end their participation can start participating again at any time after you resume it.

Resubscribe a participant

An unsubscribed participant must call the organization's help desk if they want to resubscribe. Then, the help desk agent can resubscribe them.

After you resubscribe participants, they start receiving requests for completing daily updates.

To resubscribe a participant:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant who wants to resubscribe.

Tip:

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants; or you can filter by participants with the Unsubscribed status using the filters on the left.

3. Select the participant's name.

4. Below the participant's name, select **Re-Subscribe Participant**.
5. In the Re-Subscribe Participant dialog box, select **Re-Subscribe**.

The participant status changes to the status they assigned before unsubscribing. The participant also starts receiving the daily requests to complete a daily update.

Pause a participant's participation

You can pause the daily update messages for participants who cannot provide daily updates or need to stop for a set amount of time. For example, the participant can call the organization help desk and request this action.

When pausing a participant, you must enter both the start and end date of the pause. During the pause period, participants do not receive invitations or any daily requests for status updates. But, they do receive messages about new test results (if any).

To pause invitations and daily updates for a participant:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant who needs to pause participation.

Tip:

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Select the participant's name.
4. Below the participant's name, select **Pause Participation**.
5. Enter the start and end date for the pause. The dates are inclusive. For instance, if the start date is on a Monday, the participant doesn't receive the daily request on that Monday.
6. Enter a reason for the pause and select **Pause Participation**.

On the first day of the pause period, the participant's status changes to Paused Participation. After the pause period completes, the participant's status returns to the status assigned to the participant before the pause.

Remove a participation pause

If a participant is ready to resume daily updates before the participation pause end date, you can end the pause period early.

To remove the pause of invitations or daily update messages for a participant:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant who is resuming participation during a pause.

Tip:

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Select the participant's name.
4. Below the participant's name, select **Remove Pause Participation**.
5. Select **Remove Pause Participation**.

If the subject had a status of Paused Participation, they return to the status assigned before pausing participation. Additionally, the participant starts receiving messages again.

End participant participation

An agent for the organization's help desk can end a participant's participation. For example, if a participant passes away or just wants to stop completing daily updates, you can end the participation for that participant.

You can end participation for a SneezSafe participant, but nothing changes for the participant. SneezSafe participants do not receive any messages from Oracle COVID-19 Patient Monitoring System at any time.

If you want to pause participation or end it for multiple participants at once, see [Pause a participant's participation](#) or [End participation for multiple participants](#).

To end participation for a participant:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant who is stopping participation.

Tip:

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants.

3. Select the participant's name.
4. Below the participant's name, select **End Participation**.
5. In the Confirm Ending Participation dialog box, provide details on why you need to end the participation:
 - a. Review the information, and make sure you're ending participation for the correct participant.
 - b. Below Reason, select the reason for ending participation.
 - c. If you selected **Deceased** for the Reason, enter the **Date of Death**.
 - d. If you selected **Other** for the Reason, complete the **Other reason** field.
 - e. Select **End Participation**.

The participant's status changes to one of the following statuses:

- If you selected **Deceased** as the Reason, the participant's status changes to Deceased. The system no longer sends messages to the participant. It also doesn't include them in the charts on the Dashboard unless you select the option to Share Data. If you select Share Data, you continue to use the data and the participant status appears Active. If you select Exclude Data for a deceased participant, you stop sharing the data and the participant status appears as Inactive.

- If you selected any other reason, the participant's status changes to Inactive. The system no longer sends messages about the daily update to the participant. But, it does send a message if new test result comes in.

If you ended participation in error, or if a participant wants to participate again, see [Resume participant participation](#).

End participation for multiple participants

You can end participation for people who never provided a daily update or did not provide one for an extended period of time.

If you need to end participation for a single participant, see [End participant participation](#) instead of this procedure.

To end participation for multiple participants:

1. Along the top, select the **Participants** tab.
2. Below the row of tabs, expand the **Bulk Actions** menu, and select **End Participation**.
3. From the **Last Participant Update** drop-down menu, select **Never given an update** or a period of time.

Participation ends for anyone who hasn't provided an update in the time period you select.

For example, if you select **2 Weeks Ago**, participation ends for anyone who hasn't provided a daily update in two or more weeks.

The Recipients field lists the number of participants whose participation ends.

Tip:

To see the names of the affected participants, close the dialog box. Then select the appropriate value in the **Last Status Update** filter on the left.

4. Select **End Participation**.

The participants' status changes to Inactive and they no longer receive any messages from Oracle COVID-19 Patient Monitoring System. But, they continue to receive messages for test results.

If you ended participation in error or a participant wants to participate again, you can resume the participation again. For more information, see [Resume participant participation](#).

To see the number and percentage of participants who are now inactive, select the Dashboard tab, open the Participant Breakdown page, and review the Status pie chart.

Resume participant participation

Participants who end their participation can start participating again at any time after you resume it.

If you need to resume participation after a pause, see [Remove a participation pause](#).

To resume participation for a participant:

1. Along the top, select the **Participants** tab.
2. In the list of participants, locate the participant who wants to resume participation.

 **Tip:**

You can find the participant by typing their name, external identifier, or email address in the filter above the list of participants; or you can filter by Inactive participants using the filters on the left.

3. Select the participant's name.
4. Below the participant's name, select **Resume Participation**.
5. In the Confirm Resume Participation dialog box, review the participant's information and select **Resume Participation**.

The participant's status changes from Inactive to Active. The participant starts receiving messages from Oracle COVID-19 Patient Monitoring System again.

6

Dashboard

When you need review participant data, head to the Dashboard page.

- [Dashboard charts](#)
The dashboard provides several pages of robust visualizations, including time series charts, pie charts, and map charts, which help you understand participant engagement, location, symptoms, and more.
- [Dashboard filters](#)
The Dashboard pages offer powerful filters that let you customize your view of data.
- [View participant data](#)
You can filter the data in the charts and generate reports from several charts on the dashboard.

Dashboard charts

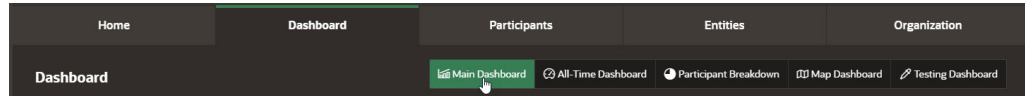
The dashboard provides several pages of robust visualizations, including time series charts, pie charts, and map charts, which help you understand participant engagement, location, symptoms, and more.

The following dashboard pages are available:

- [Main Dashboard charts](#)
The Main Dashboard contains time series charts that help you understand participant engagement and symptoms.
- [All-Time Dashboard charts](#)
The All-Time Dashboard contains metrics about your system since day 1.
- [Participant Breakdown charts](#)
The Participant Breakdown pie charts provide at-a-glance insights into the populations that you're monitoring. Each pie chart corresponds to a filter on the left.
- [Map Dashboard charts](#)
The Map Dashboard charts show you the locations of your participants as well as their test results and symptoms, all on map-based charts. The charts are on a logarithmic scale and are aggregated by county.
- [Testing Dashboard charts](#)
The Testing Dashboard contains time series charts that help you understand testing information, including volume of tests, test types, and test results.

Main Dashboard charts

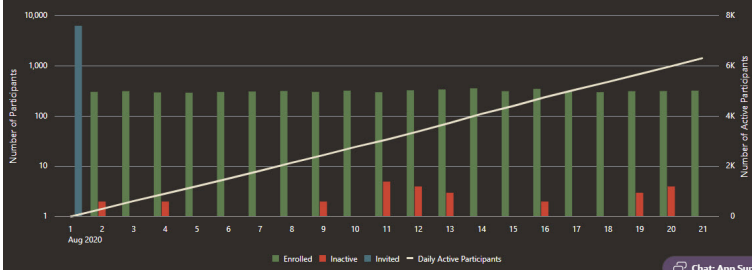
The Main Dashboard contains time series charts that help you understand participant engagement and symptoms.



Any [filters](#) that you select apply to all dashboard pages.

The charts have built-in reports containing detailed participant information for each metric. To view a report, point to a horizontal or vertical bar line until your mouse changes to a hand icon, and then click. You can also export this information to a CSV for further analysis or action.

Chart	Description
Overview metrics	<ul style="list-style-type: none"> • Number of Invites Sent: Number of invitations that were sent to participants who meet your filtering criteria. • Number of Active Participants: Percentage of invited participants who decided to participate and who meet your filtering criteria. This count doesn't include participants with a status of Deceased. • Uptake % in Timeframe: Percentage of participants who meet all the following criteria: <ul style="list-style-type: none"> – They decided to participate. – They haven't unsubscribed, paused their participation, or ended their participation. – They meet your filtering criteria. • Number of Status Updates: Total number of daily updates completed by participants who meet your filtering criteria. • People With Status Updates: Number of participants who have provided daily updates and who meet your filtering criteria. • No Status Updates for 14 Days: Number of participants who haven't provided a daily update in the 2 weeks prior to the last day of the Timeframe filter and who meet your filtering criteria.

Chart	Description
Enrollment	<p>The Enrollment chart helps you understand your participants' current statuses as well as their engagement with Oracle COVID-19 Patient Monitoring System. You see only the data that meets the requirements that you specified in the filters.</p> <p>Vertical bar lines, which correspond with the left Y-axis, appear for each day or week (you decide the time period using the filters) in which participants' statuses have changed. The bar lines are color coded for each status. For information about participant statuses, see Participant statuses.</p> <p>The white line, which corresponds with the right Y-axis, shows the number of active participants at a given time.</p> <p>To show or hide the data for a status, click the status in the key that is below the chart.</p> 

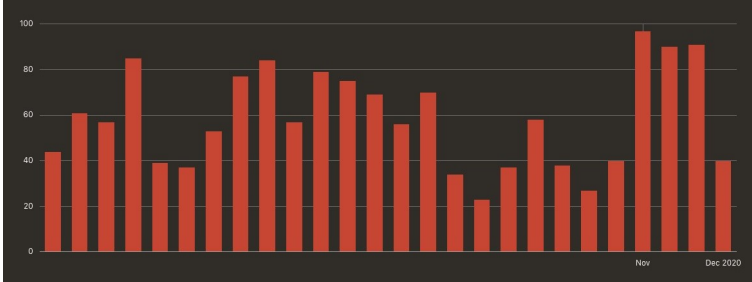
Uptake %	<p>The Uptake Percent chart helps you understand the percent of invited participants who decided to participate. You see only the data that meets the requirements that you specified in the filters.</p> <p>A vertical bar line appears for each day or week (you decide the time period using the filters) in which participants were added to the system and invited to participate. The bar line shows the percentage of participants who decided to participate. Use this chart along with the Timeframe filter on the left to understand the time frame in which participants accept their invitations.</p> <p>This chart is useful not only for identifying the people who participate but also for identifying the people who haven't responded. For example, you can click a vertical bar line for a date, filter the view so that you see only the Pending participants, and create a plan for reaching out to them.</p> 
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Chart	Description
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Validation

The Validation chart helps you determine whether participants reached their maximum validation attempts while entering their personal information. If any participants encountered this issue, you can determine whether an operational error is to blame. For instance, if many participants enter information that doesn't match your records in Oracle COVID-19 Patient Monitoring System, their personal information might have been incorrect in the upload file. You see only the data that meets the requirements that you specified in the filters.

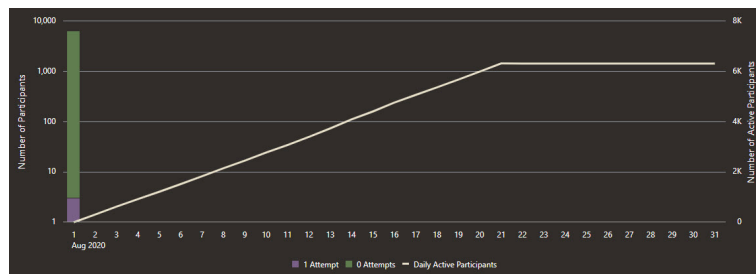
A participant has 3 tries to enter their personal information so that Oracle COVID-19 Patient Monitoring System can validate their identity. After a third failure, they are locked out and cannot take any further action until a help desk agent, coordinator, or other user [resets their validation attempts](#).

On this chart, the white line, which corresponds with the right Y-axis, shows the number of active participants at a given time.

The vertical bar lines, which correspond with the left Y-axis, are color-coded for participants who have made 0, 1, 2, or 3 attempts to validate their identity on that day or week (you decide the time period using the filters).

Note:

This chart is useful for tracking trends, but the Participants tab offers a more straightforward method for [identifying the participants who have been locked out](#).



Engagement

The Engagement chart helps you understand the number of participants who completed daily updates during a given day or week (you decide the time period using the filters). You see only the data that meets the requirements that you specified in the filters.

If you are continually adding new participants to the system, these values should track upwards.

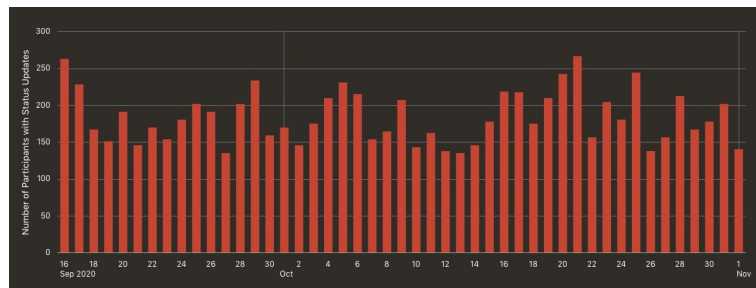


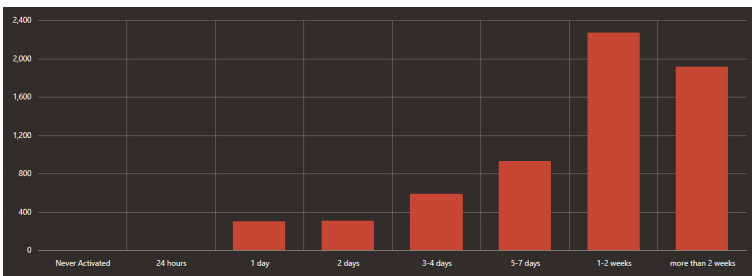
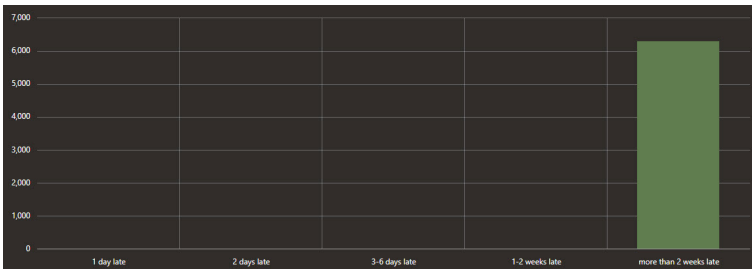
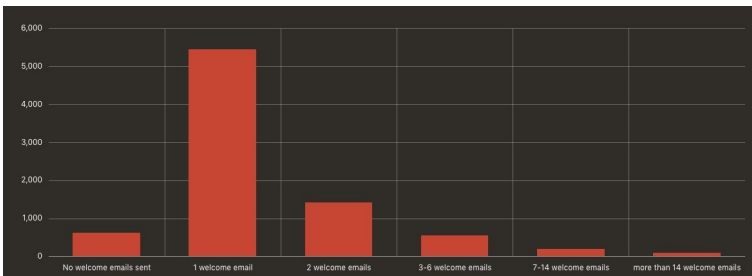
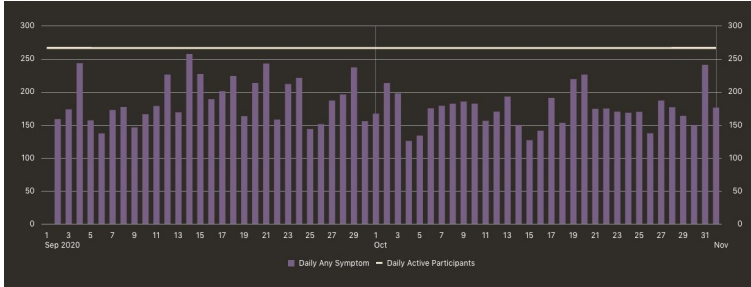
Chart	Description
Activation	<p>The Activation chart helps you understand the time that passed between participants receiving their invitations and entering their personal information so that Oracle COVID-19 Patient Monitoring System can validate their identity. You see only the data that meets the requirements that you specified in the filters.</p> <p>This chart also includes participants who haven't entered their personal information yet. You can check this chart periodically to identify any participants who haven't entered their personal information yet and take the appropriate action, such as resending an invitation.</p> 
Lateness	<p>The Lateness chart helps you understand the time that has passed since your participants' most recent daily updates. You see only the data that meets the requirements that you specified in the filters.</p> <p>Participants who are counted in the 1 day late bar line completed their last daily update yesterday. They might not actually be late with today's update yet; they simply might not have completed it yet.</p> <p>You should check this chart periodically to identify any participants who haven't completed a daily update in a while and take an appropriate action.</p> 
Welcome Emails	<p>The Welcome Emails chart helps you understand the number of invitations that invited participants have received. This chart includes only invited participants, so after a participant validates their identity, they no longer are included in this chart. You see only the data that meets the requirements that you specified in the filters.</p> <p>This chart is useful for monitoring your recruitment. You should check this chart periodically to identify the participants to re-invite.</p> 

Chart	Description
Any Symptom	<p>The Any Symptom chart helps you understand the participants who reported at least one COVID-19 symptom on a day or week (you decide the time period using the filters). You see only the data that meets the requirements that you specified in the filters.</p> <p>Vertical bar lines, which correspond with the left Y-axis, appear for each day or week (you decide the time period using the filters) in which participants' reported a single symptom.</p> <p>The white line, which corresponds with the right Y-axis, shows the number of active participants at a given time.</p> <p>A map-based form of this chart is available on the Map Dashboard page.</p> 

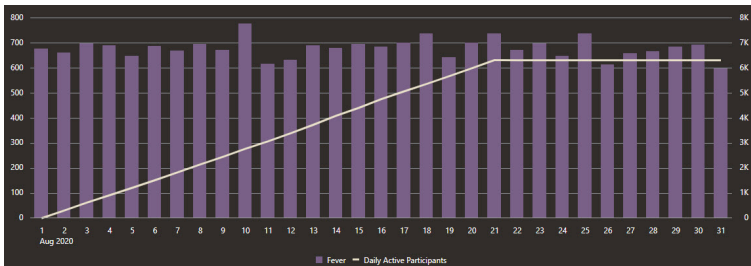
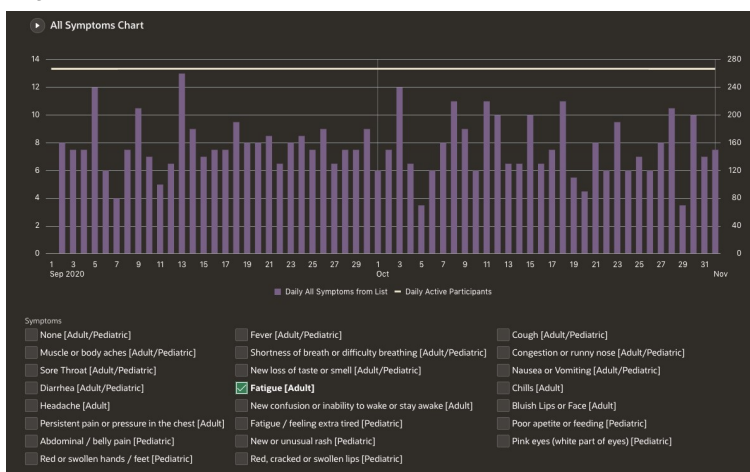
Any Symptom from List	<p>The Any Symptom from List chart helps you understand the participants who reported at least one symptom on a day or week (you decide the time period using the filters). You select the symptoms from a list below the chart. You see only the data that meets the requirements that you specified in the filters.</p> <p>The white line, which corresponds with the right Y-axis, shows the number of active participants at a given time.</p> <p>A map-based form of this chart is available on the Map Dashboard page.</p> 
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Chart	Description
All Symptoms from List	<p>The All Symptoms from List chart helps you understand the participants who reported a specific combination of symptoms on a day or week (you decide the time period using the filters). You select the combination of symptoms below the chart. You see only the data that meets the requirements that you specified in the filters.</p> <p>The white line, which corresponds with the right Y-axis, shows the number of active participants at a given time.</p>

 **Note:**

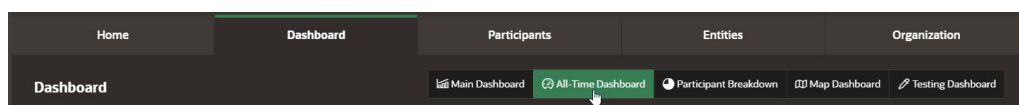
Only participants who experienced every single symptom that you select appear in the chart. To see participants who experienced any single symptom from a list, review the Any Symptom from List chart.

A map-based form of this chart is available on the Map Dashboard page.



All-Time Dashboard charts

The All-Time Dashboard contains metrics about your system since day 1.

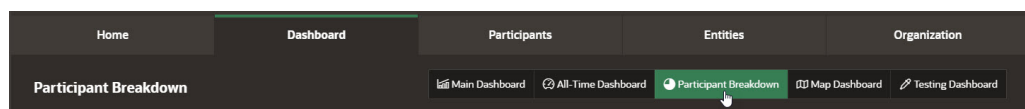


Any filters that you select apply to all dashboard pages, with the exception of the Timeframe filter, which doesn't affect this page.

Chart	Description
Participation Overview metrics	<ul style="list-style-type: none"> • Number of Invites Sent: Number of invitations sent since day 1 to participants who meet your filtering criteria. • Uptake %: Percentage of participants who meet all the following criteria since day 1: <ul style="list-style-type: none"> – They decided to participate. – They haven't unsubscribed, paused their participation, or ended their participation. – They meet your filtering criteria. • Number of Active Participants: Percentage of invited participants who meet all the following criteria since day 1: <ul style="list-style-type: none"> – They decided to participate. – They haven't unsubscribed, paused their participation, or ended their participation. – They meet your filtering criteria. • Total Enrolled: Number of participants who decided to participate since day 1 and who meet your filtering criteria. • Total Ended Participation: Number of participants who have ended their participation since day 1 and who meet your filtering criteria. • Total Unsubscribed: Number of participants who have unsubscribed since day 1 and who meet your filtering criteria.
Survey Overview metrics	<ul style="list-style-type: none"> • Number of Status Updates: Number of daily updates that participants who meet your filtering criteria have completed since day 1. • People With Status Updates: Number of participants who have ever provided a daily update since day 1 and who meet your filtering criteria. • No Status Updates for 14 Days: Number of participants who have ever gone 14 days without a daily update and who meet your filtering criteria.
Medical Test Overview metrics	<ul style="list-style-type: none"> • Self Reported Tests: Number of test results that participants who meet your filtering criteria have reported in daily updates since day 1. • Vendor Tests: Number of test results that vendors have reported since day 1 for participants who meet your filtering criteria. • Test Notifications Sent: Number of messages the system has sent for vendor-reported tests since day 1 to participants who meet your filtering criteria. • Test Notifications Opened: Number of messages that participants who meet your filtering criteria have viewed for vendor-reported tests since day 1.

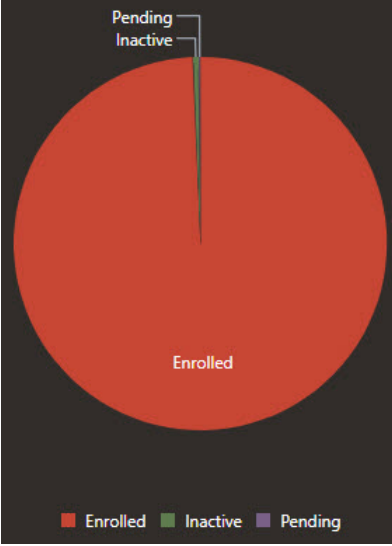
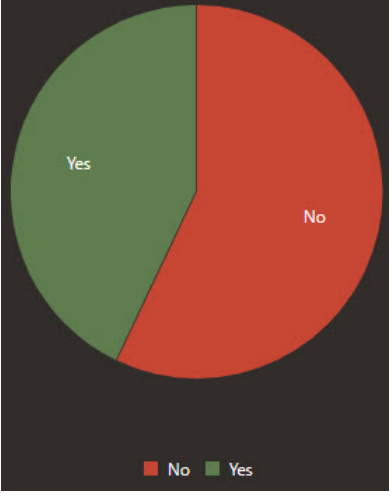
Participant Breakdown charts

The Participant Breakdown pie charts provide at-a-glance insights into the populations that you're monitoring. Each pie chart corresponds to a filter on the left.



Any [filters](#) that you select apply to all dashboard pages.

For example, if you click the Active segment in the Status pie chart, all charts show only participants with a status of Active. To return to the original view, click **Clear All Filters** above the list of filters.

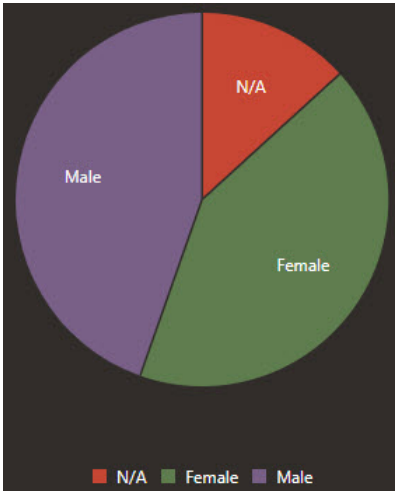
Chart	Description
Status	<p>The Status pie chart shows the proportion of participants who meet your filtering criteria and who have each status.</p> 
Healthworkers	<p>The Healthworkers pie chart shows the proportion of participants who meet your filtering criteria and who are healthcare workers.</p> 

Chart

Description

Sex at Birth

The Sex pie chart shows the proportion of participants who meet your filtering criteria and who are of each sex.



Entity

The Entity pie chart shows the proportion of participants who meet your filtering criteria and who are associated with each entity.

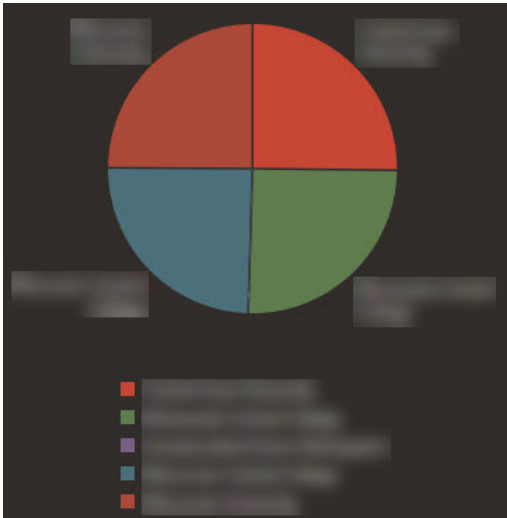
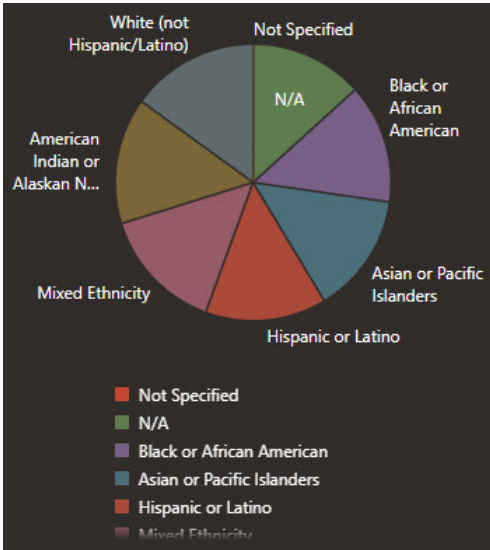
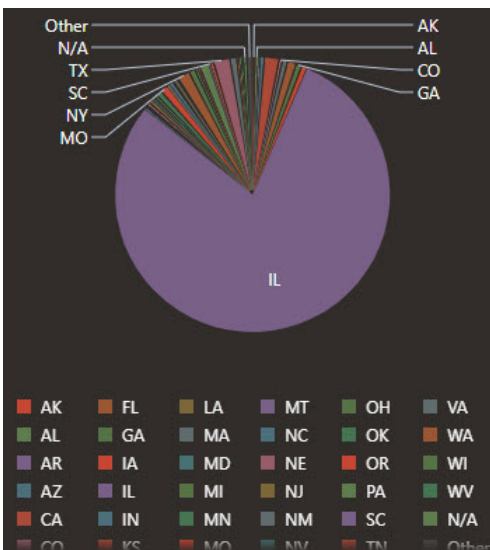
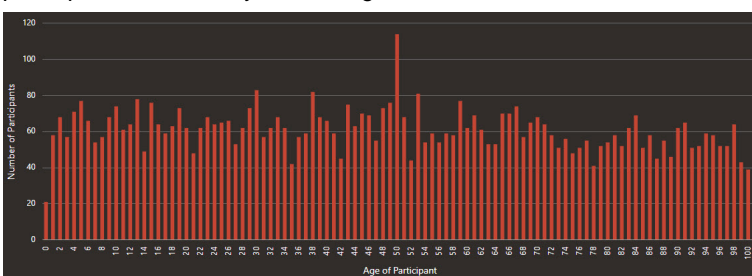
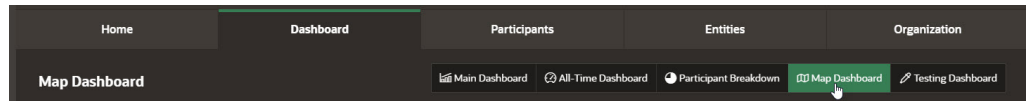


Chart	Description
<p data-bbox="446 262 560 294">Ethnicities</p>	<p data-bbox="690 262 1464 325">The Ethnicities pie chart shows the proportion of participants who meet your filtering criteria and who are of each ethnicity.</p> 
<p data-bbox="446 892 527 924">States</p>	<p data-bbox="690 892 1464 955">The States pie chart shows the proportion of participants who meet your filtering criteria and who live in each state.</p> 
<p data-bbox="446 1522 609 1554">Age Histogram</p>	<p data-bbox="690 1522 1464 1585">The Age Histogram chart helps you understand the ages of all your participants who meet your filtering criteria.</p> 

Map Dashboard charts

The Map Dashboard charts show you the locations of your participants as well as their test results and symptoms, all on map-based charts. The charts are on a logarithmic scale and are aggregated by county.



Any [filters](#) that you select apply to all dashboard pages.

Chart	Description
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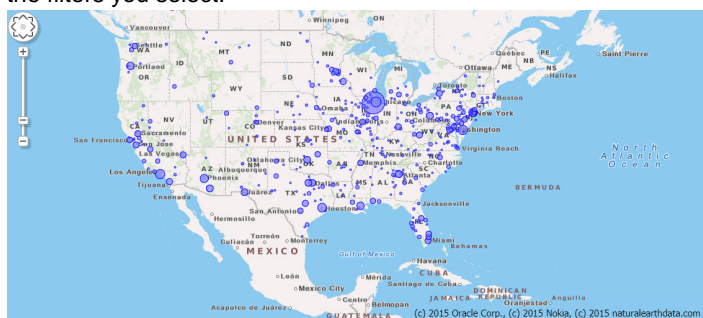
Invited
Active
Engagement

The Invited, Active, and Engagement charts help you understand where your participants live. A circle that is proportional to the number of participants appears over every county in which participants live. Point to a circle to see the county name and the number of participants. You see only the data that meets the requirements that you specified in the filters.

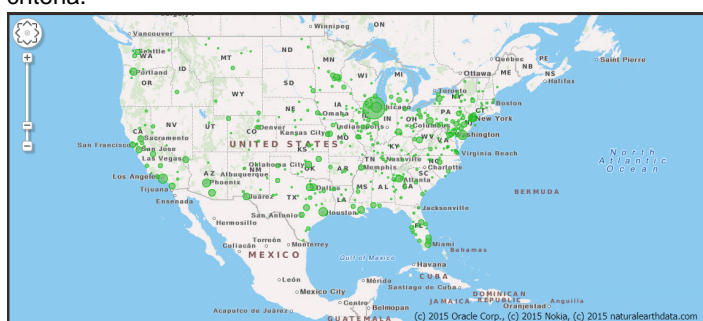
These charts offer map-based versions (with participants grouped by county) of the time series charts on the Main Dashboard.

Each chart shows different information:

- Invited: Shows all participants who have been invited according to the filters you select.



- Active: Shows only participants who were active as of the end of the time frame you select and who meet your other filtering criteria.



- Engagement: Shows only the participants who have completed a daily update and who meet the filters you select.

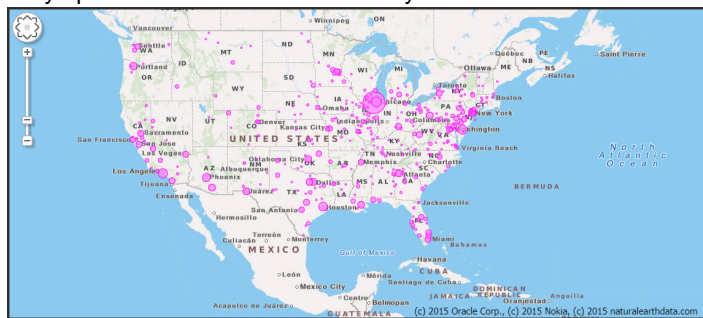
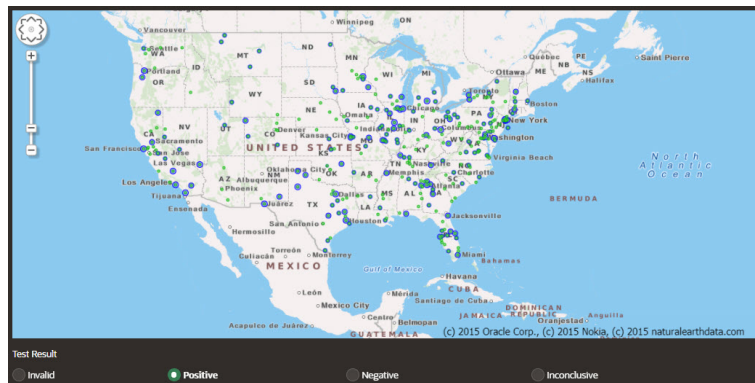


Chart	Description
Self-Reported Test Results Test Vendor Results	<p>The Self-Reported Test Results chart and the Test Vendor Results chart show the geographical distribution of positive, negative, invalid, and inconclusive test results that either participants or vendors reported. You see only the data that meets the requirements that you specified in the filters.</p> <p>Each blue circle represents the total number of self-reported tests or vendor-reported in the county. A different color circle appears in front of the blue circle, depending on the test result that you select below the chart:</p> <ul style="list-style-type: none"> • Positive: The green circle that appears in front of each blue circle represents the number of positive tests. • Negative: The red circle that appears in front of each blue circle represents the number of negative tests. • Invalid and Inconclusive: The yellow circle that appears in front of each blue circle represents the number of invalid or inconclusive tests.



Any Symptom	<p>The Any Symptom chart helps you understand the geographical concentration of participants who reported at least one COVID-19 symptom. You see only the data that meets the requirements that you specified in the filters.</p> <p>This chart, along with the other geographical symptom charts, is useful for tracking symptoms over time and for identifying early warning signs of outbreaks. For example, if you see a sudden spike in fevers over a short period of time, this information can inform your communication, planning, and testing strategies.</p> <p>A time series form of this chart is available on the Main Dashboard page.</p>
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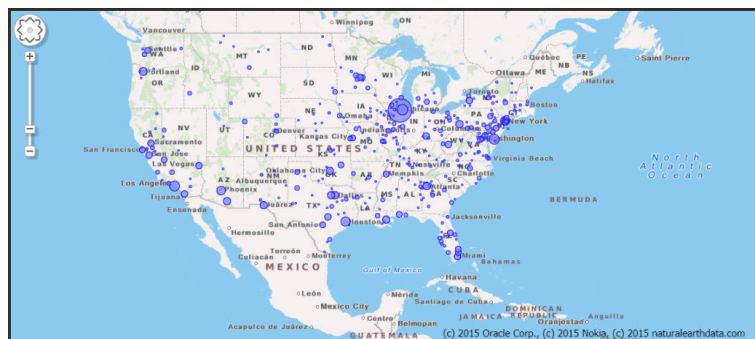
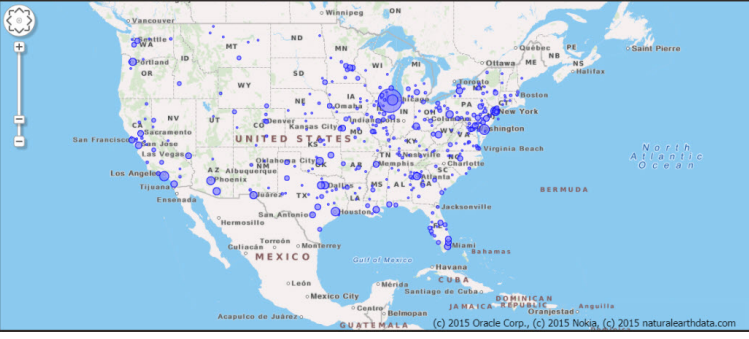

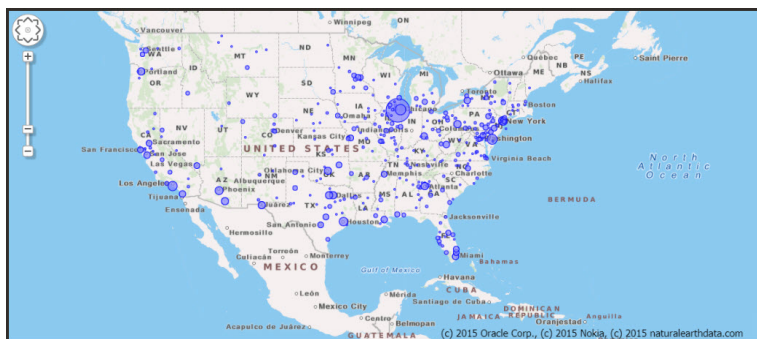


Chart	Description
Any Symptom from List	<p>The Any Symptom from List chart helps you understand the geographical concentration of participants who reported at least one symptom from a list that you curate. You select the symptoms from a list below the chart. Participants who experienced at least one of the symptoms are included in the chart. You see only the data that meets the requirements that you specified in the filters.</p> <p>A time series form of this chart is available on the Main Dashboard page.</p> 

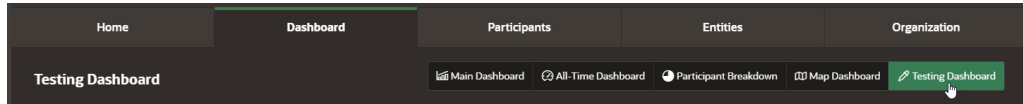
All Symptoms from List	<p>The All Symptoms from List chart helps you understand the geographical concentration of participants who reported the specific combination of symptoms that you select. You select the combination of symptoms below the chart. Only participants who experienced all the symptoms are included in the chart. You see only the data that meets the requirements that you specified in the filters.</p> <div data-bbox="909 1081 1455 1365" style="border: 1px solid #0070C0; padding: 10px; margin-top: 10px;"> <p> Note:</p> <p>Only participants who experienced every single symptom that you select appear in the chart. To see participants who experienced any single symptom from a list, use the Any Symptom from List chart.</p> </div>
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A time series form of this chart is available on the Main Dashboard page.



Testing Dashboard charts

The Testing Dashboard contains time series charts that help you understand testing information, including volume of tests, test types, and test results.



Any [filters](#) that you select apply to all dashboard pages.

The charts have built-in reports containing detailed participant information for each metric. To view a report, point to a horizontal or vertical bar line until your mouse changes to a hand icon, and then click. You can also export this information to a CSV for further analysis or action.

Chart	Description
Testing Overview	<ul style="list-style-type: none"> • Self Reported Tests: Total number of tests reported through daily updates from participants who meet your filtering criteria. • Vendor Tests: Total number of tests that vendors reported for participants who meet your filtering criteria. • Test Notifications Sent: Total number of test result messages sent for vendor tests for participants who meet your filtering criteria. • Test Notifications Read: Total number of test result messages viewed by participants who meet your filtering criteria.
Test Results	<p>The Test Results charts, available below both Vendor Tests and Self Reported Tests, offer a quick look at participants' test results. These charts help you understand how testing is going, including seeing the number of tests that vendors are providing. You see only the data that meets the requirements that you specified in the filters.</p> <p>On both charts, vertical bar lines, which correspond with the left Y-axis, appear for each day or week (you decide the time period using the filters) in which participants either received or reported a test result. Bar lines have color coding for each type of result: green for positive, red for negative, and purple for inconclusive.</p> <p>For self reported test results, you can select one or more check boxes below the chart to see only the results for specific test types.</p> <p>The white line, which corresponds with the right Y-axis, shows the number of active participants at a given time.</p> <p>In addition to seeing test results, these charts can help you track how tests are going, including identifying the general testing rate and the testing rate within specific populations.</p>

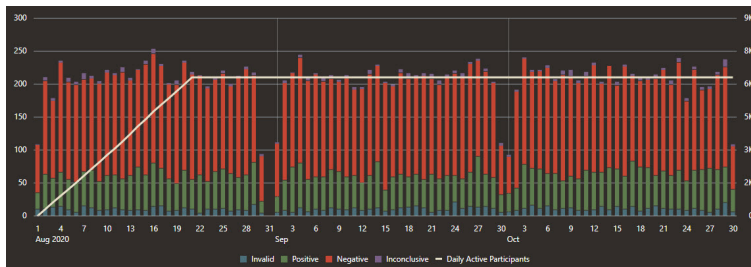
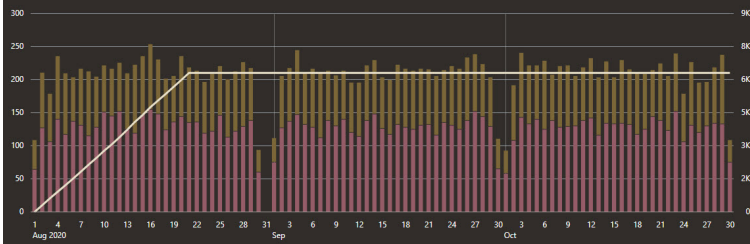


Chart	Description
Test Types	<p>The Test Types charts, available below both Vendor Tests and Self Reported Tests, offer a quick look at the test results that vendors reported. You see only the data that meets the requirements that you specified in the filters.</p> <p>On both charts, vertical bar lines, which correspond to the left Y-axis, appear for each day or week (you decide the time period using the filters) in which vendors reported test results for a participant. The bar lines are color coded for each type of test.</p> <p>The white line, which corresponds to the right Y-axis, shows the number of active number of participants at a given time.</p> 

Dashboard filters

The Dashboard pages offer powerful filters that let you customize your view of data.

The Dashboard offers several pages of charts, and different pages have different filters. In general, if a filter appears on a page, the filter is applicable to all charts on the page, with some exceptions:

- On the Main Dashboard page, the Activity filter doesn't apply to or affect the Activation, Lateness, and Welcome Emails charts.
- On the Testing Dashboard page, the Test Types filter doesn't apply to or affect the charts below the Self Reported Tests header.

Filter	Description
Activity	For time series charts (charts with vertical bars), choose whether you want to see one bar per day or one bar per week.
Age Group	Select one or more age groups to see data only for participants in those age groups.
County	(Appears only after you select a value for State.) Select one or more counties to see data only for participants who live in those counties.
Entity	Select one or more entities to see data only for participants who are associated with those entities.
Ethnicity	Select one or more ethnicities to see only data for participants who are of those ethnicities.
Health Workers	Select Yes to see only data for participants who are healthcare workers. Select No to not include healthcare workers in the charts.
Sex at Birth	Select either Male or Female to see data only for participants who chose that option as their sex.

Filter	Description
State	Select a state from the drop-down to see data only for participants who live in the state.
Status	Select a status to see data only for participants who have the status.
Status Date	Select a date to see data only for daily updates from the date.
Test Types	Select a test type to see data only for results for that test type.
Timeframe	Select a time period to see data only from that time. To see data from a time period outside of the preselected ranges, select Custom . For example, you can create a custom timeframe filter to see data for the month of October, the last two days, or the last year. The custom filter is also useful for comparing time periods, such as two individual weeks months. A custom timeframe can be up to six months long.
ZIP Code	(Appears only after you select options from the State and County filters.) Enter a ZIP code to see data only for participants who live in the ZIP code.

View participant data

You can filter the data in the charts and generate reports from several charts on the dashboard.

To view participant data in the dashboard charts:

1. Along the top, select the **Dashboard** tab.
2. Below the row of tabs, select the dashboard page to view:
 - **Main Dashboard**
 - **All-Time Dashboard**
 - **Participant Breakdown**
 - **Map Dashboard**
 - **Testing Dashboard**

For descriptions of the dashboards, see [Dashboard charts](#).

3. Optional: Apply filters as needed.
 - Apply a filter on the left.
Each page has different filters. For descriptions of the filters, see [Dashboard filters](#).
 - On the Participant Breakdown page, click any slice in a pie chart to apply that filter to all charts on the page.
 - To remove all filters from a page, click **Clear All Filters**, located above the list of filters on the left.
4. Optional: Generate a report from a time series chart (a chart with a white line and vertical bars).
 - a. Point to the white line or a vertical bar line until your mouse changes to a hand icon, and then click.

A report appears.

- b. Filter the information in the report as needed.
- c. To save a local copy of the report, click **Download**, located above the report table and to the right.

A CSV file downloads to your computer.

7

Organizations and entities

Your Oracle Customer Success manager creates your organization and entities with your guidance, so some of the tasks in this section might not be relevant to you.

- [Manage organizations](#)
Your Oracle Customer Success manager creates your organization with your guidance, so some of the tasks in this section might not be relevant to you.
- [Manage entities](#)
Your Oracle Customer Success manager creates entities with your guidance, so some of the tasks in this section might not be relevant to you.

Manage organizations

Your Oracle Customer Success manager creates your organization with your guidance, so some of the tasks in this section might not be relevant to you.

- [Select the organization](#)
If you have access to more than one organization, you can access an option to switch over to the organization you need to manage at any time.
- [View organization details](#)
You can view the number of users and participants at an organization, the names of the users, and contact information on the Organization page.
- [Update details about your organization](#)
An organization coordinator can update the email address and phone number for the organization's help desk at any time.

Select the organization

If you have access to more than one organization, you can access an option to switch over to the organization you need to manage at any time.

To select the organization you want to access:

1. Perform one of the following steps:
 - On the Home page, click **Switch Organization**.
You only see this option if your role allows access to multiple organizations.
 - In the application banner, to the left of the Help menu, select the name of the organization you currently work in.

Tip:

The number next to the organization name represents the number of organizations you can access. If you can only access one organization, you do not see a number.

2. In the Select Organization list, select the organization you want to access.

View organization details

You can view the number of users and participants at an organization, the names of the users, and contact information on the Organization page.

To view organization details:

1. Along the top, select the **Organization** tab.
2. Scroll to view details about the organization. The Organization page includes the following information:
 - Support contact information
 - Number of users and participants
 - Names of the users and their roles

Update details about your organization

An organization coordinator can update the email address and phone number for the organization's help desk at any time.

To modify organization details:

1. Along the top, select the **Organization** tab.
2. Below the tabs and to the right, select **Edit Organization**.
3. Update any of the following fields:
 - **Support Notification Preference:** Select the way that participants in this organization contact support.
 - **Email:** Participants see only the email address for support.
 - **Mobile:** Participants see only the phone number for support.
 - **Both:** Participants see both the email and phone number for support.

Make sure you provide the email address, phone number, or both in the next two fields.

Note:

If you [choose a different contact method for an entity](#), the entity-level setting overrides the organization-level setting. For example, consider an organization that has a contact method of Mobile. 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.

- **Support Email:** Enter the email address for your organization's help desk. If you use the #SUPPORT_EMAIL# placeholder text in any email templates, this placeholder text uses the new value after you save your changes.
- **Support Phone Number:** Enter the phone number for your organization's help desk. If you use the #SUPPORT_PHONE# placeholder text in any email

templates, the placeholder text uses the new value after you save your changes.

**Note:**

If you need to update any other fields, contact your Oracle Customer Success manager.

4. Click **Save Changes**.

Manage entities

Your Oracle Customer Success manager creates entities with your guidance, so some of the tasks in this section might not be relevant to you.

- [Entities with parent-child relationships](#)
An entity is a group of participants that you want to monitor and analyze together. When you create entities with parent-child relationships, your dashboard offers a bespoke view of participant data.
- [Add an entity](#)
An entity is a group container for participants that you want to monitor and analyze together. An organization must include at least one entity, but most include several entities.
- [Add entities in bulk](#)
If you have to add a lot of entities, you can save time by adding them to a CSV file and uploading the file.
- [View entity details](#)
You can view the users and participants associated with an entity on the Entities page.

Entities with parent-child relationships

An entity is a group of participants that you want to monitor and analyze together. When you create entities with parent-child relationships, your dashboard offers a bespoke view of participant data.

Parent-child relationships among entities offer a few advantages:

- The dashboard shows the relationship among the entities.
- The dashboard organizes participant data the way that you analyze it.
- Permissions are a little easier to assign. For instance, someone with access to a parent entity also has access to all of its child entities.

However, you can also create standalone entities.

Example of entities with parent-child relationships

Your organization might want to create parent-child relationships among your entities. For example, consider the following hierarchy of participant groups for a chain of pharmacy stores:

- Store 1639

- Store 1639 Employees
- Store 1639 Clinic Customers
- Store 1639 Prescription Customers
 - * Store 1639 Prescription Customers - Acute
 - * Store 1639 Prescription Customers - Chronic
- Store 1639 Vaccinated Individuals

An Oracle Customer Success manager creates each of the bulleted entries as an entity. An organization can decide whether the parent entities (in this example, Store 1639 and Store 1639 Prescription Customers) have participants. Allowing parent entities to have participants is a good idea if you expect to add participants who aren't a logical fit for the child entities.

This parent-child approach, when paired with thoughtful entity planning, offers a few advantages:

- Faster data analysis on the dashboard and increased flexibility for data analysis. When you carefully plan your entities, you can easily monitor your population groups both separately and together on the dashboard.
- Easier assignment of permissions. A person who is granted access to a parent entity also has access to its child entities, simplifying your administrative work.

Example of entities without parent-child relationships

Here's an alternate way to group the previous entities:

- Store 1639 Employees
- Store 1639 Clinic Customers
- Store 1639 Prescription Customers - Acute
- Store 1639 Prescription Customers - Chronic
- Store 1639 Vaccinated Individuals

This flat structure allows you to analyze your entities both individually and together. However, when analyzing data, you might need a few extra clicks and filters to see the data that you're interested in. Additionally, setting up permissions might take a little bit longer if multiple people are responsible for monitoring participant data.

Add an entity

An entity is a group container for participants that you want to monitor and analyze together. An organization must include at least one entity, but most include several entities.

Your Oracle Customer Success manager creates your entities according to your data analysis needs. To learn more about entity options, see [Entities with parent-child relationships](#).

If you need to add several entities, you can save time by adding them to a CSV file and uploading the file as described in [Add entities in bulk](#).

To add an entity to an organization:

1. Along the top, select the **Entities** tab.
2. On the right and toward the top, select **Add Entity**.
3. Enter data in the following fields:
 - **Entity Name:** Enter a unique name for the entity.
 - **Code:** Enter a unique short name for the entity.
 - **Address, Address 2, City, State, and ZIP Code**
 - **Support Notification Preference:** Select the way that participants in this entity contact support.
 - **Organization Default:** Participants see the contact method that was selected for the organization.
 - **Email:** Participants see only the email address for support.
 - **Mobile:** Participants see only the phone number for support.
 - **Both:** Participants see the email and phone number for support.

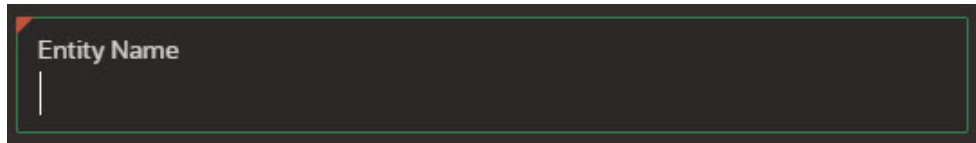
Make sure you provide the email, phone number, or both in the next two fields to ensure you provide a way to contact support.

 **Note:**

If you set a different contact method for an entity and its organization, the entity-level setting overrides the organization-level setting. For example, consider an organization that has a contact method of Mobile. 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.

- **Support Email:** Enter the email address for the support team.
- **Support Phone Number:** Enter the phone number for the support team.
- **Entity for uploading SneezSafe Participants:** Select this field if the SneezSafe app uploads daily updates for participants who are in this entity. If you select this field, participants who are associated with this entity don't receive text or email requests to complete their daily updates. After you save, this field becomes read-only. Contact your Oracle Customer Success manager if you need to change the field.
- **Send any Notifications to Participants:** Select this field if the entity is a SneezSafe entity, or if you don't want to send any messages to any participants in the entity. If you don't send messages, participants cannot complete their daily updates.
- **Parent Entity:** If you are creating entities with parent-child relationships, and this entity is a child of another entity, select the parent entity. If you haven't created the parent entity yet, you can leave this field blank for now and select the parent entity later, after you create it.

Required fields have a red triangle in the upper-left corner.



4. Select **Add Entity**.

Now, you can [add participants to the entity](#).

Add entities in bulk

If you have to add a lot of entities, you can save time by adding them to a CSV file and uploading the file.

To add entities one at a time, see [Add an entity](#).

To upload multiple entities for an organization at once:

1. Along the top, select the **Entities** tab.
2. On the right and toward the top, select **Load Entities**.
3. To learn about the requirements for the CSV file, perform one or both of the following steps:
 - To learn about the format of the file and the required fields, select **CSV Format**.
 - To see a sample file that uses the correct format, select **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.
5. After the CSV file is finished, 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.

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

After the file passes the validation review, the Preview Entity Data page appears.

6. Review the preview information to ensure its accuracy.
7. Click **Load x Entities**, where *x* is the number of entities in the CSV file.
You see a success message.
8. Optional: To return to the Entities page and view all the entities, select **View Entities**.

Now you can [add participants to the entities](#).

View entity details

You can view the users and participants associated with an entity on the Entities page.

To view entity details:

1. Along the top, select the **Entities** tab.
2. Locate an entity in the list and click its name.
3. Scroll to view details about the entity.

The page includes the following information:

- Information about the entity, including its parent organization, code, and address.
- The number of participants, including the number of participants who are active or are healthcare workers.
- Names of the users and their roles.

8

Stratified samples

Stratified samples let you assign test kits to a subset of your population.

- [About stratified samples](#)
Create a stratified sample if you need to assign test kits to a subset of your population and you want Oracle COVID-19 Patient Monitoring System to manage the assignment of the test kits.

About stratified samples

Create a stratified sample if you need to assign test kits to a subset of your population and you want Oracle COVID-19 Patient Monitoring System to manage the assignment of the test kits.

Before you create a stratified sample, consider the following questions:

1. What factors determine whether a participant is included in a stratified sample?
For example, you might want to include all healthcare workers in a single stratified sample.

If you want to create a stratified sample that is representative of your overall population, you have several options:

- Stratify participants by the criteria of your choice, such as geography, ethnicity, or age.
- Add participants using a simple random sampling, such as by using the every-*n*th-person approach.

2. How many test kits are assigned to each sub-group?
If only some participants receive a test kit, you need to know only the number of test kits that are available to assign.

However, in some cases, you might need to assign test kits to all participants in a stratified sample. For example, you might assign test kits to all healthcare workers in a stratified sample. In such cases, make sure you know how many healthcare workers are in the system so you can assign a kit to all of them.

3. How will you assign test kits within the pool?
For a stratified sample that contains only healthcare workers, you can use the first-come, first-served approach if you want to assign a test kit to everyone.

Alternately, if you're assigning test kits to only some participants in a stratified sample, you can assign test kits using the every-*n*th-person approach.

4. What are the next steps for participants who don't receive test kits?
For instance, you can choose one of the following options:
 - Keep the participants in the stratified sample.
The participants remain eligible to receive future test kit disbursements.
 - Return the participants to the population.
The participants are eligible for inclusion in another stratified sample.

To learn more about stratified samples, reach out to your Customer Success manager.

9

Test periods

If you need to test some or all of your participants at a fixed frequency, you can create test periods for managing the tests.

- [About test periods](#)
Test periods let you test participants at a set frequency.
- [Workflow for test periods](#)
Organizations and participants have their own workflow for test periods.

About test periods

Test periods let you test participants at a set frequency.

Testing frequency is up to you

You can test participants at the frequency of your choice, such as weekly or monthly. You have several options for identifying the participants who receive these tests:

- Invite all participants to receive tests.
- Invite participants based on the results of an initial test.
After the participant joins the test period, they remain in the test period, regardless of the results of future tests. For example, a participant might need a positive initial result to join, and they remain in the test period even if all subsequent test results are negative.

When to add participants

When the results of an initial test determines the participants who are invited, consider the following factors when planning when to add participants:

- If you're inviting all participants to receive tests, you can add participants to the system at any time.
- If the results of an initial test determine whether participants receive tests, consider whether the lab sends the test results to Oracle COVID-19 Patient Monitoring System:
 - If the lab sends the test results to the system, the system automatically adds participants to the test period based on their test results. Therefore, you might want to add the participants to the system before the test results come in.
 - If the test results are managed outside Oracle COVID-19 Patient Monitoring System, you might want to add the participants after the test results come in. When you build the CSV file with participant information, you can include information about whether each participant is part of a test period. You can also add participants before the test results come in. However, after the test results come in, you have to manually add participants to the test period. Depending on the number of participants to add, this approach could take some time.

Workflow for test periods

Organizations and participants have their own workflow for test periods.

Workflow for organizations

An organization that wants to use test periods must complete the following tasks:

1. Identify the vendors that conduct the tests.
If you need to add more vendors in the future, contact your Oracle Customer Success manager.
2. Identify the testing frequency, such as monthly or weekly.
3. Identify the tests.
4. Determine who is eligible for joining the test period, such as all participants or only participants with a specific test result.
If you opt for the latter, you must also determine the criteria for joining the test period, including the test and the required result. You also must identify the vendor and determine whether the vendor reports the results to Oracle COVID-19 Patient Monitoring System.

Workflow for participants

The following events occur after a coordinator adds the participants to the system.

1. The system sends a participant an invitation and a request to book an appointment.
2. The participant decides to participate.
3. The participant books a testing appointment, such as a dry blood spot test or a puncture test, with the lab vendor of their choice.
4. If the test results meet an organization's requirements—for example, if the test is positive—the system invites the participant to continue receiving tests.
5. The participant agrees to receive further tests.
6. At the appropriate times, the system sends the participant requests to book subsequent tests. For each test, the participant can book an appointment with the lab vendor of their choice.

If a participant receives a test from another source, they can report the results through any daily update.

10

Locations and Schedules

An Oracle Customer Support manager creates the locations for an organization. That person also sets up the types of schedules you want and the different types of appointments you want to book.

For appointments, you can request that the manager set up specific types of appointment choices. For example, you may need appointments for monoclonal antibody infusions, monoclonal infusion monitoring, follow up appointments, COVID-19 screenings, or COVID-19 swab tests. Those appointments may allow telemedicine calls or walk-in patients.

You can also ask your Customer Success manager to set up the schedules, location users, and location usages. For example, for the usage, you can specify the location, health system (test, infusion, Oracle, support), entity, and determine if the location as active or not.

Location users at an organization can schedule different types of appointments for participants at any of their locations. And, one location can include scheduled appointments for one or more organizations. You can also create different types of schedules for different types of appointments.

- [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.
- [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.
- [Manage appointments](#)
You can schedule in-person or telemedicine appointments in advance. Once scheduled, the system automatically sends out notifications using the participants contact information. Or, you can schedule walk-in appointments if participants go directly to the site to be seen by a healthcare worker that day.

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](#).

- [Edit location details](#)
Location administrators can edit the locations details set up by their Oracle Customer Success manager. For example, you can edit the address or add or modify the contact person at a location. (If you need a location created for your organization, contact your Oracle Customer Success Manager.)
- [Add different types of appointments at locations](#)
When your Oracle Customer Success manager creates one or more locations for your organization, that person also adds the details on the type of appointments done at your locations. For example, a location may include appointments for monoclonal antibody infusions, monoclonal infusion monitoring, follow up appointments, or COVID-19 tests.
- [Delete different types of appointments at locations](#)
You may need to update the appointment types at a location if the location no longer performs a certain type of appointment. For example, if a location used to include monoclonal infusion monitoring and COVID-19 tests, but now it no longer includes the COVID-19 tests, you can remove it.

Edit location details

Location administrators can edit the locations details set up by their Oracle Customer Success manager. For example, you can edit the address or add or modify the contact person at a location. (If you need a location created for your organization, contact your Oracle Customer Success Manager.)

To edit the details of 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 where you want to make edits when prompted.
3. Select the **Administration** tab.
4. Select **Edit Location Details** from the right of the Location Details section to open the dialog box.
5. Edit the field information for the location. (Required fields appear with a red upper-left corner.) For example, you can change the name, code, address, time zone, and point of contact. You can also add (or remove) details on the number of days in advance that someone can schedule an appointment at the location.
6. Select **Apply Changes**.

The next time you view that location, you see your changes in the Location Details section of the Administration tab.

For details on adding certain types of appointments to a location, see [Add different types of appointments at locations](#).

Add different types of appointments at locations

When your Oracle Customer Success manager creates one or more locations for your organization, that person also adds the details on the type of appointments done at your locations. For example, a location may include appointments for monoclonal antibody infusions, monoclonal infusion monitoring, follow up appointments, or COVID-19 tests.

If you select a location with only one type of appointment available, you cannot add another one. Your Customer Success manager must create the types of appointments available before you assign one or more of them to a location.

To add an appointment type:

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 where you want to make edits when prompted.
3. Select the **Administration** tab.
4. Scroll down to the Location Appointment Types section and select **Add Location Appointment Type** to open the dialog box.
5. Select the appointment type you want to add from the **Appointment Type** drop-down menu.
6. Select **Add Appointment Type**.

Delete different types of appointments at locations

You may need to update the appointment types at a location if the location no longer performs a certain type of appointment. For example, if a location used to include

monoclonal infusion monitoring and COVID-19 tests, but now it no longer includes the COVID-19 tests, you can remove it.

To delete an appointment type:

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 where you want to make edits when prompted.
3. Select the **Administration** tab.
4. Scroll down to the Location Appointment Types section and locate the row with the name of the appointment type you want to delete (for example, MAB Infusion).
5. Select **Delete** from the end of the row.
6. Select **OK** to confirm the deletion.

You no longer see that appointment type listed for the 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.

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.
- [Edit a schedule for a location](#)
As a location administrator, you can edit a schedule at any time.
- [View details on a schedule](#)
You can also view different types of previously created schedules by selecting the appointment type. You can also preview a schedule when you create or edit one.
- [Change capacity on a schedule](#)
As a location administrator, you can change the capacity of a schedule for a particular day at any time. For example, you may need to remove a third shift if a location no longer includes enough staff to cover that time.

- **Clear a schedule**
As a location administrator, you can clear appointment types from a schedule for a particular time frame. For example, you may need to do this if you know your location staff cannot arrive at the location on a certain date and time.
- **Close a schedule**
As a location administrator, you can close a schedule at any time. For example, you may need close a schedule if you no longer want to perform a particular type of appointment there any longer.

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.

Edit a schedule for a location

As a location administrator, you can edit a schedule at any time.


To edit 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: 

3. Select the **Schedules** tab.
4. Select **Manage Schedules**.
5. In the **Appointment Type** field at the top of the page, select the type of appointment you want to manage from the drop-down list (if not done already).
6. Do one of the following:
 - Select the date on the calendar for the schedule to open the Schedule Actions dialog box. Select **Edit Schedule**.
 - Scroll down the page to the sections under the calendar (for example, Schedules or Closings section) and locate the row with the schedule you need to edit. Select **Actions > Edit** from the end of the row to open the Change Schedule page.
7. Scroll down the page to review the latest field information and settings and make the necessary changes.
8. 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.

9. Review the schedule on the calendar.
10. Perform one of the following steps:
 - If the schedule appears correct, select **Update Schedule**. You see an updated 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. Then repeat steps 8-10.

View details on a schedule

You can also view different types of previously created schedules by selecting the appointment type. You can also preview a schedule when you create or edit one.


For more information on previewing new or changed schedules, see [Create a schedule for a location](#) or [Edit a schedule for a location](#).

To view details of a current schedule:

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: 
3. Select the **Schedules** tab.
4. In the **Appointment Type** field at the top of the page, select the type of appointment you want to manage from the drop-down list (if not done already).
5. Review the schedule on the calendar. You can view by month, week, or day. You also see panels with details on the number of checked in participants, appointments available today and tomorrow, contact information, appointment types at that location, and the number of location users (administrators or staff users).

If you need to make changes, see [Edit a schedule for a location](#).

Change capacity on a schedule


As a location administrator, you can change the capacity of a schedule for a particular day at any time. For example, you may need to remove a third shift if a location no longer includes enough staff to cover that time.

To change the capacity of a schedule:

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: 
3. Select the **Schedules** tab.
4. Select **Manage Schedules**.
5. In the **Appointment Type** field at the top of the page, select the type of appointment you want to manage from the drop-down list (if not done already).
6. Select **Change Capacity** to open the Change Capacity dialog box.
7. In the **Date** field, select the calendar icon to select the date when you want to reduce the capacity.
8. Select the shift where you want to reduce the capacity. You can then enter the reduced number in the **New Slots** field. You see an Impact Info list of options in case your changes affect confirmed appointments.
9. Do one of the following, depending on how you want to impact the schedule:
 - **Keep all appointments:** You do not want to cancel any of the appointments already scheduled for that day.

- **Reschedule when possible, keep otherwise:** Ensure that current participants do not lose their appointment if they cannot reschedule it to another day.
- **Reschedule when possible, cancel otherwise:** Ensure that participants get contacted to reschedule them to another day, but cancel the appointments for the select date after trying to reschedule.
- **Cancel all appointments:** Cancels all appointments on that day

 **Note:**

If you select an option to reschedule an appointment, Oracle COVID-19 Patient Monitoring System automatically reschedules the appointment for the participant automatically. The participant gets notified and can call to reschedule if needed.

10. Select **Change Capacity**. You see a success message at the top of the screen.
11. Review the schedule on the calendar and check the date you selected. You see details on the type of appointment and times that you reduced the schedule.

Clear a schedule


As a location administrator, you can clear appointment types from a schedule for a particular time frame. For example, you may need to do this if you know your location staff cannot arrive at the location on a certain date and time.

To clear the appointments on a schedule:

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: 
3. Select the **Schedules** tab.
4. Select **Manage Schedules**.
5. In the **Appointment Type** field at the top of the page, select the type of appointment you want to manage from the drop-down list (if not done already).
6. Select **Clear Schedule or Reduce Capacity** to open the Extra Schedule Options dialog box.
7. Select **Clear Appointments** to open the dialog box. You see the location details and it's status (Active or Inactive) at the top.
8. Select the appointment type that you want to clear from the **Appointment Type** drop-down menu (if necessary).

9. Select **Single Day** or **Multiple Days**. Then use the calendar icon to select the date (or start and end dates).
10. Select the start and end times you want to clear the appointment type. You see an Impact Info message how many appointments you plan to clear.
11. Select **Clear Appointments**. You see an appointments cleared message at the top of the screen.
12. Review the schedule on the calendar and check the date or dates you selected. You see details on the type of appointment and times that you cleared.

Close a schedule


As a location administrator, you can close a schedule at any time. For example, you may need close a schedule if you no longer want to perform a particular type of appointment there any longer.

To close a schedule:

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: 
3. Select the **Schedules** tab.
4. Select **Manage Schedules**.
5. In the **Appointment Type** field at the top of the page, select the type of appointment you want to manage from the drop-down list (if not done already).
6. Select **Schedule a Closing** to open the Schedule a Closing page. You see the location details and it's status (Active or Inactive) at the top.
7. Select the appointment type that you want to clear from the **Appointment Type** drop-down menu (if necessary). (If you do not select an appointment type, the system clears all the appointment types.)
8. In the **Closing Name** field, enter a name for the closed schedule.
9. Select **This is a single-day closing** or **This closing is for more than one day**. Then use the calendar icon to select the date (or start and end dates).
10. Select the **Start Time** and **End Time** that you want to clear using the drop-down menus. You see an Impact Info message how many appointments you plan to clear (if any scheduled).
11. Select **Preview Schedule**.
12. Review the schedule details on the calendar and check the date or dates you selected.

 **Note:**

- If the closing conflicts with another closing or the closing impacts appointments, you see alert messages. For example, for scheduling conflicts, you see options to select **Reschedule what is possible**, **cancel all others** or **Cancel all affected appointments**.
- If you select an option to reschedule an appointment, Oracle COVID-19 Patient Monitoring System automatically reschedules the appointment for the participant automatically. The participant gets notified and call to reschedule if needed.

13. Select **Create Closing**. You see closing message at the top of the screen.
14. Review the schedule on the calendar and check the date or dates you selected. You see details on the type of appointment and times that you closed.

Manage appointments

You can schedule in-person or telemedicine appointments in advance. Once scheduled, the system automatically sends out notifications using the participants contact information. Or, you can schedule walk-in appointments if participants go directly to the site to be seen by a healthcare worker that day.

- [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.
- [Schedule a walk-in appointment](#)
Location administrators and location staff users can schedule different types of appointments for participants. The participant may exist in the system or you may need to add the participant. For example, a new person may walk into your location and want you to set up a same-day appointment.
- [View appointments](#)
Location administrators and location staff users can view the appointments scheduled for the current day and the next day at a location. Or, you can view the appointments scheduled for a particular participant.
- [Resend an appointment notification](#)
You can send another appointment notification to a participant at any time, if necessary. For example, you may want to send an extra notification a day or two before the appointment. (The system automatically sends a notification when you create the appointment.)
- [Cancel an existing appointment](#)
You can cancel a previously scheduled appointment for a participant, if necessary. The system automatically notifies them.
- [Check in participants](#)
When participants arrive at a location, you can check them in for their appointments.

- **Call participants from the queue**
When a location staff member (healthcare worker) can see the participant, you can call them from the queue. But, they must check in at the location before getting called from the queue.
- **Process an appointment**
To process an appointment for a participant, a location user checks in the participant and calls the participant from the queue. Then a healthcare worker can perform the medical procedure. If your location uses in-office surveys, the healthcare worker may also need to answer some medical questions about the appointment.

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.

Schedule a walk-in appointment


Location administrators and location staff users can schedule different types of appointments for participants. The participant may exist in the system or you may need to add the participant. For example, a new person may walk into your location and want you to set up a same-day appointment.

To schedule a walk-in 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 and select **Add Participant**. For more information, see [Add a participant](#).
5. Scroll down the page and select the name of the participant who needs the appointment.
6. Select **Walk In Appointment** to book an appointment that day.
7. If the schedule allows more than one type of appointment, select the type you want from the **Appointment Type** drop-down menu. Each appointment type indicates if you can also schedule walk-in or telemedicine appointments.
8. Select the time (if available).
9. Select **Make Appointment & Check In**.

When ready, you can call the participants from the queue as described in [Call participants from the queue](#).

View appointments

Location administrators and location staff users can view the appointments scheduled for the current day and the next day at a location. Or, you can view the appointments scheduled for a particular participant.


To schedule an appointment, see [Schedule an appointment](#) or [Schedule a walk-in appointment](#).

To view appointments:

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. Do one of the following:
 - To view the appointments scheduled at your location today (and tomorrow), select **Appointments** from the Locations/Scheduling tab. You completed this procedure.
 - To view the appointments of a particular participant, select the **Participants** tab.
4. Enter some identifying data on the participant in one or more of the fields (such as last name, zip code) and select **Search**.
5. Select the name of the participant you need to check to open the participant details.
6. Scroll down to the Appointments section. You see the upcoming, past, and canceled appointments for that participant.

Resend an appointment notification


You can send another appointment notification to a participant at any time, if necessary. For example, you may want to send an extra notification a day or two before the appointment. (The system automatically sends a notification when you create the appointment.)

To send an extra appointment notification:

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: 
3. Select the **Participants** tab.
4. 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.
5. Scroll down the page and select the name of the participant who needs the appointment reminder. (You see the upcoming appointments in the Appointments section.)
6. Select **Resend Appointment Confirmation**.

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

Cancel an existing appointment


You can cancel a previously scheduled appointment for a participant, if necessary. The system automatically notifies them.

To cancel 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: 
3. Select the **Participants** tab.
4. 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.
5. Scroll down the page and select the name of the participant with the appointment you need to cancel. You see any upcoming appointments in the Appointments section.
6. Select **Process or Cancel**. (If the appointment is for today, you can check the participant in to the queue.)

7. Review the appointment details and select **Cancel Appointment**. You see a message to confirm the cancellation at the top of the screen.
8. Scroll down and select **Cancel Appointment** to confirm.

The participant receives a notification message using the contact method (email, text, or both) with details on the appointment. When reviewing details on the appointments for that participant, you can see the canceled appointment listed.

Check in participants


When participants arrive at a location, you can check them in for their appointments.

To check in 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: 
3. Select the **Check In** tab. You see a Check In Report that lists the upcoming (future) participants and details on their appointment and the time of the appointment.
4. If necessary, select the 1 to 8 hour time options to filter the list of participants. The system refreshes the list every two minutes, but you can select **Refresh Now** to refresh the data immediately.
5. Locate the row with the name of the participant you want to check in and select **Check-in** from the end of the row.
6. Review the details on the appointment with the participant to confirm and select **Complete Check In**.
7. Do one of the following:
 - Select **Check In Someone Else** to check in another participant by repeating steps 3-6.
 - Select **View Queue** to see the list of participants in the queue.

When the healthcare worker can see the patient, you can let the patient know as described in [Call participants from the queue](#).

Call participants from the queue

When a location staff member (healthcare worker) can see the participant, you can call them from the queue. But, they must check in at the location before getting called from the queue.


For more information on checking in participants, see [Check in participants](#).

To call a participant from the queue and start the appointment process:

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 **Queue** tab. You see a Check In Report that lists the upcoming (future) participants and details on their appointment and the time of the appointment.
4. If necessary, select the 1 to 8 hour time options to filter the list of participants. The system refreshes the list every two minutes, but you can select **Refresh Now** to refresh the data immediately.
5. Locate the row with the name of the participant you want to check in and select **Call Patient** from the end of the row.
6. Select **Call Patient** to confirm that you want to start the appointment process.
7. Select **Process Patient** when ready to start the health appointment. For more details on the appointment process, see [Process an appointment](#).

Process an appointment

To process an appointment for a participant, a location user checks in the participant and calls the participant from the queue. Then a healthcare worker can perform the medical procedure. If your location uses in-office surveys, the healthcare worker may also need to answer some medical questions about the appointment.

For example, a healthcare worker may enter specific medical details into a separate system used during the appointment. But, that person may also need to answer questions in Oracle COVID-19 Patient Monitoring System if your location uses in-office surveys. The survey questions may prompt you for details on the infusion (if done), product used (if any), confirmation of any COVID-19 symptoms, and details on any medical conditions.


To process an appointment and access the in-office survey (if required):

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: 

3. If not done already, call the patient from the queue by selecting the **Queue** tab. Then locate the name of the patient you want to call and select **Call Patient** from the end of the row.
4. Select **Call Patient** to confirm that you want to start the appointment process.
5. Select **Process Patient** when ready to start the health appointment. You see the participant details open in the Participants tab.
6. Perform the medical task on the patient (for example, screening, test, or infusion).
7. If your location uses in-office surveys for certain appointments (such as an infusion), select **In-Office Survey** from the top of the Participant tab (above the participant details section) in Oracle COVID-19 Patient Monitoring System. Then enter the appropriate field information and select **Submit In-Office Survey**.

For example, you may need to respond to questions about the patient meeting EUA required criteria for administration of the product, providing consent for the treatment, type of product administered, and residential address. You may also see questions to provide these types of COVID-19 details:

- Date acquired
 - Hospitalization needed
 - Oxygen needed
 - Clinical trial participant or not (with details on the trial if in one)
 - Symptoms, onset date, duration, and severity
 - Medical history
8. If the appointment involved an infusion, you see prompts to enter infusion details and select **Apply Changes to Survey** to add these details. For example, you need to provide these details:
 - Setting where product delivered: Select **Infusion Center**, **Mobile Infusion**, **Long-term care facility**, **Skilled nursing facility**, **Home**, or **Other**. If you choose **Other**, enter details on the product delivery setting.
 - **Product Lot Number**: Enter the lot number of the product.
 - **Product Expiration Date**: Use the calendar icon to select the date of the infusion.
 - Access to EMS within 30 minutes: Select **Yes** or **No** to confirm if the patient could access to emergency medical service within 30 minutes.
 - **Infusion Start Date**: Use the calendar icon to select the date the infusion started.
 9. Select one of the following options if you performed an infusion and use an in-office survey:
 - **Infusion Pause**: Select to submit an infusion pause request if you need to stop the infusion plan.
 - **Adverse Event**: Select to submit a report on an adverse event the participant experienced (if any). Enter the appropriate field information on the date the adverse event started, if it occurred during the infusion, and if you consider it serious. Then select **Submit Adverse Event** to submit it.

- **End Visit:** Select to end the infusion visit and answer some final questions on the infusion. For example, you need to provide details on the end dates for the infusion and visit, confirm if the infusion completed successfully, if you observed the patient for an hour after the infusion, and if you needed to dispose any of the product without administration. Select **End Patient Visit** again to submit the details.
- **Follow Up:** Select this option after ending a visit or pausing an infusion. You can then enter follow-up data such as the date of the follow up, if patient required hospitalization or not, if patient passed away or not. Then select **Submit Follow Up** to submit the details.
- **Schedule:** Select to schedule a new appointment as described in [Schedule an appointment](#).