IBM® Watson Health®

**Return-to-Workplace Advisor** and **Return-to-Campus Advisor**

# Employer Guide

For enterprise & campus

September 2020

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# Introduction

## Welcome

Use the information to implement and administer an IBM product that helps your organization plan a safe return to the workplace or school:

For enterprise: IBM® Watson Health® Return-to-Workplace Advisor

For campus: IBM Return-to-Campus Advisor

This product is part of Watson Works (https://www.ibm.com/watson/watson-works)

# What's new

Learn what's new in Return-to-Workplace Advisor releases. You can find information about features, fixes, and more.

**Tip:** For the latest information on what's new, see the separate Return-to-Workplace Advisor Release Notes. The document describes new features, key updates, enhancements, and defect fixes.

## August 2020

This summarizes recent key features and updates:

**Command Center Analytics application**

Now included with IBM Return-to-Workplace Advisor is the Command Center Analytics Application to monitor and manage changing location conditions with purpose-built analytics. Command Center information is in a dashboard format with, for example, predicted cases, deaths at both the county and state levels in a timeline of daily new incidence. For more information, see Using the Command Center Analytics Application.

**Lab results integration**

Return-to-Workplace Advisor supports integration of lab result data. When your organization submits lab data for this use, Return-to-Workplace Advisor incorporates lab result information in the Employee Support Application and the Student Support Application. For more information, see Integration and data sharing.

# About the product applications

IBM has designed this product to assist businesses in re-opening the enterprise or campus, with a focus on employee and student health. The solution includes:

**1. The Command Center Analytics Application**

This is designed to assist organizations in assessing workplace and community risk data in near real time – helping to identify company locations where conditions have been met to return to the enterprise or campus.

**2. The Employee Support Application or Student Support Application**

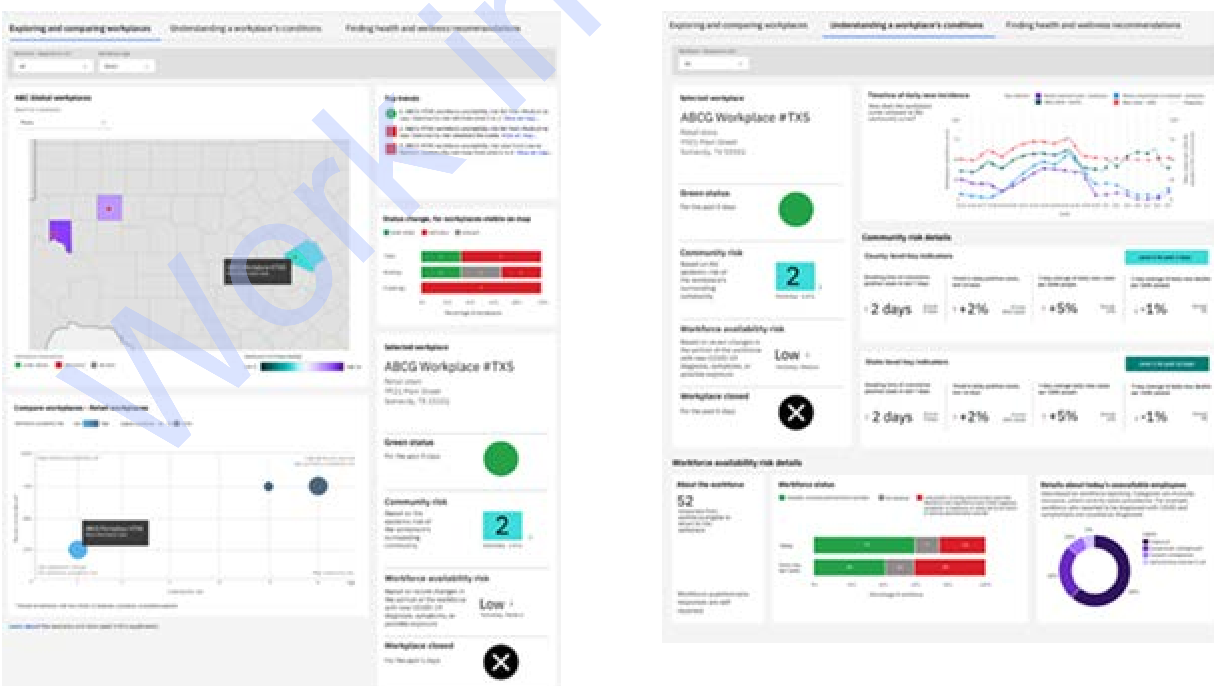
This end-user application supports regular check-ins to self-report symptoms and communicate status. IBM® Watson Assistant helps answer questions about COVID-19.

For general information about how this product is used in business and educational settings, see About the enterprise and campus versions.

# 1. The Command Center Analytics Application

As an employer, you can use the **Command Center Analytics Application** to monitor and manage changing location conditions with purpose-built analytics. You can identify company locations where re-entry conditions have been met. Review site-specific health promotion opportunities, and search for patterns, nationally and locally. Using this application, you monitor locations defined using a Site Directory. You'll check health status for your organization's users, defined using a User Directory.

**Figure: Managing locations using the Command Center Analytics Application**



# 2. Employee Support Application or Student Support Application

Employees or students check in on their health status using either an enterprise or campus support application. By using an application, users benefit from having privacy in self-reporting on their current health, compared to in-person screening. They can get answers to COVID-19 questions with an IBM® Watson virtual assistant.

### Enterprise and campus versions

**IBM Employee Support Application** is the enterprise version, and **IBM Student Support Application** is the campus version. Users self-report symptoms and other data to routinely assess their eligibility to return to the office or campus.

### Self-clearance

Authorized users can use self-clearance review to update their status. To self-clear, the user answers a series of questions to request a return to the office or campus.

### Configuration options

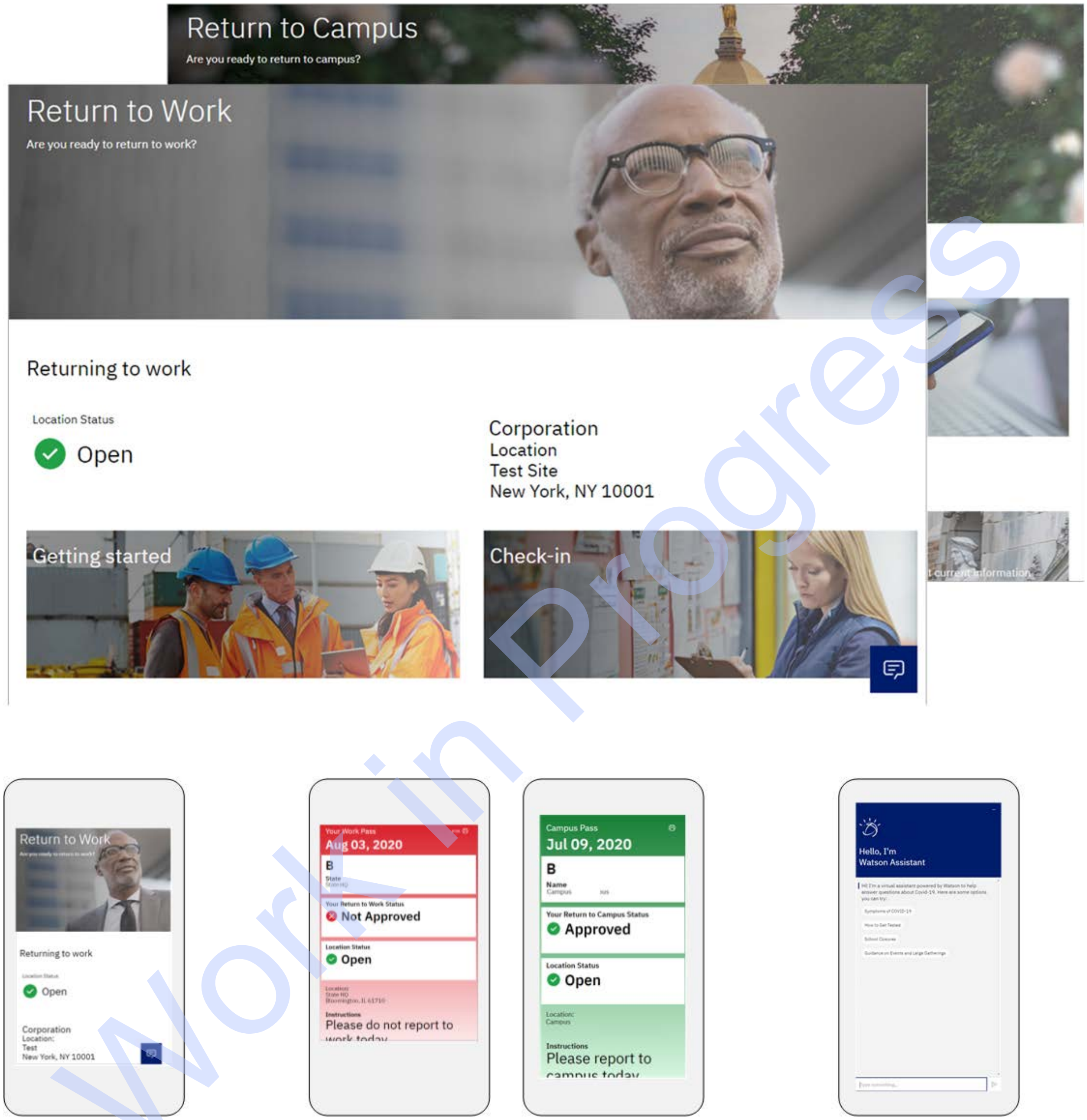
To meet your organization's needs, you can configure features in the support application. For example, when users self-report on health status, your organization might want to ask about certain symptoms, but not others. In addition, population health and the spread of COVID-19 in your area changes over time. By configuring, you can collect the information you need and, as a result, be better informed for your organization's decision making.

### Desktop, mobile

IBM has designed this application for use on both desktop and mobile displays.

**Note:** For brevity, documentation refers to the **support application** when referring to both the enterprise and campus versions.

**Figure: Support application, enterprise and campus versions, with Work Pass, Campus Pass**



# About the enterprise and campus versions

IBM designed this product for both enterprise and educational customers, as a flexible decision making and self-reporting solution. In addition to having different types of locations — for example, office buildings, branch offices, hospitals, clinics, and campuses — your organization can have different categories of users. Personnel can work or study on site or off site, or in multiple locations. For schools that use the support application, you can work with IBM to implement a campus version, the Student Support Application. In the campus version, terminology and labeling are different.

**Table 1 Examples of enterprise, campus terms**

| Product version | Application | Location pass | Examples of users |
|---|---|---|---|
| **Enterprise version**<br><br>Return-to-Workplace Advisor | Employee Support Application | Work Pass | Employees, contractors |
| **Campus version**<br><br>Return-to-Campus Advisor | Student Support Application | Campus Pass | Students, staff |

# About check-ins

Routine employee or student check-ins are an important part of the product. Checking in is quick and easy, involving a series of questions on current health status, for example, whether they've been diagnosed with COVID-19 or possibly exposed to it.

- Your organization can request that employees or students check in with whatever frequency that you'd like, for example, daily check-ins.
- A **green** (approved) Work Pass or Campus Pass expires after 18 hours.
- A **red** (not approved) Work Pass or Campus Pass stays red until there is an intervention.
- If an employee or student doesn't check in for a 24-hour period, then the pass expires. The employee or student has what's effectively a neutral status.

# About clearances

Return-to-Workplace Advisor supports clearances for employees or students. With an **administrative clearance**, a location coordinator at organization overrides the current status for the employee or student. For more information, see Overriding return statuses. With **self-clearance**, the employee or student requests clearance through either the Employee Support Application or the Student Support Application. Return-to-Workplace Advisor supports configuration of self-clearance items, for example, the self-clearance text.

A clearance removes the complete health profile for the employee or student, including any reasons that indicate why a red (not approved) Work Pass or Campus Pass was issued.

# About continuous change, improvement

IBM is improving the Return-to-Workplace Advisor on an on-going basis, to meet the time-critical, changing needs for the product's applications. Product features and configuration options shown in product documentation are subject to change. Return-to-Workplace Advisor uses releases delivered continuously, where IBM adds features on an on-going basis, with no fixed duration between releases. If you have questions, contact your IBM team.

# Supported web browsers and mobile devices

IBM recommends selected browsers and devices for use with Return-to-Workplace Advisor. When a new browser version is released, Return-to-Workplace Advisor supports the newly released version. Support for the oldest, previously supported version is discontinued.

**Tip:** We recommend that you use the latest browser version for best performance.

**Table 2 Recommended web browsers, by application**

| Application | Desktop | Mobile |
|---|---|---|
| Command Center Analytics Application | Recommended: Two latest production-level browser versions<br>**Microsoft® Windows®**<br>Microsoft® Edge V81 or later release (chromium based)<br>**Mac OS**<br>Google Chrome V81.0.4 or later release<br>Safari V13.1 or later release<br>Mozilla Firefox V76.0 or later release | — |
| Employee Support Application, Student Support Application | See above | Recommended: Latest versions of web browsers and operating systems<br>iOS Safari browser<br>Android browser |

# Roles and responsibilities

Implementing and administering Return-to-Workplace Advisor involves coordination between your organization and IBM. The roles summarized here should help you plan for the resources and skills you'll need onsite. Your organization might not require all these roles, or the same person might fulfill multiple roles. If you have questions, contact your IBM team.

**Note:** Testing your implementation can involve many of these roles on your team.

**Table 3 Onsite roles, duties**

| Roles | Responsibilities |
|---|---|
| Configuration specialist at customer site | Provide IBM with the organization's desired Return-to-Workplace Advisor configurations |
| Policy specialist | Provide guidance on the organization's healthcare policies |
| Legal | Provide the organization with legal guidance |
| Location coordinator | Review user health status, summarized through the Command Center Analytics Application<br>Support employees or students to, for example, answer questions related to the Return-to-Workplace Advisor<br>Coordinate with IBM |
| Security administrator | Add new employees or students |
| Administrator | Prepare and submit required data files, for example, company and location information<br>Prepare and submit updated data files on an as-needed basis<br>Perform data quality control as needed, for example, to meet organization and privacy needs<br>Coordinate with IBM |
| Employees, students | Check return status, report health status |
| IBM implementation | Provision customers. Complete customer-specific configurations. Support customers. |

# Data overview

The Return-to-Workplace Advisor solution uses data from various sources, including organization directories and user data.

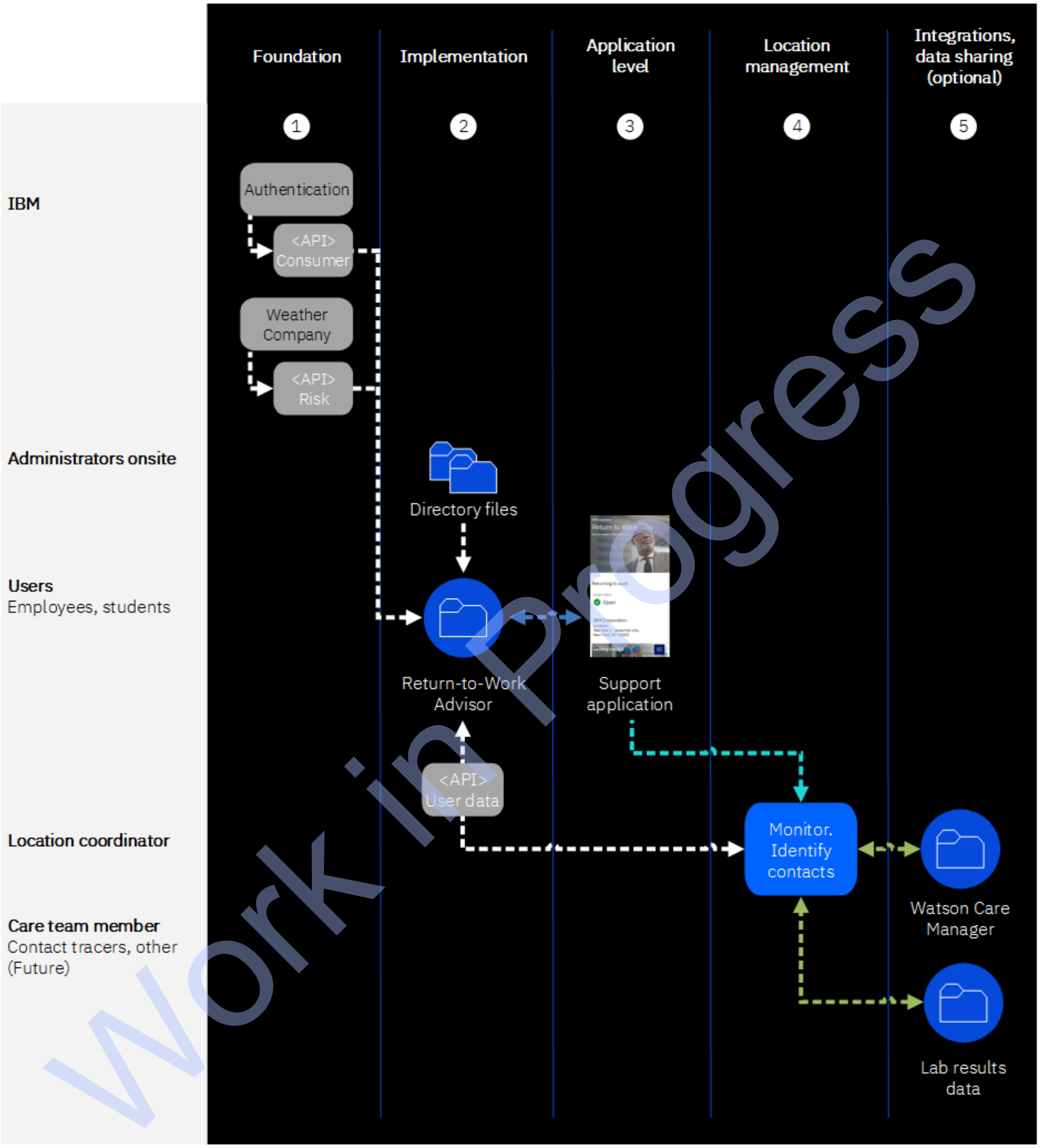
Here is an overview of how data flows through the solution in a typical deployment (figure here).

**Note:** Data flows and sources vary by customer implementation, for example, based on use of optional APIs. If you have questions, contact your IBM team.

**Table 4 Data flow summary**

| | |
|---|---|
| 1 | **Foundation**<br>Core data services provided through APIs: authentication, risk, IBM® Weather Company services (disease tracking)<br>APIs: Consumer, Community Risk |
| 2 | **Implementation**<br>Organization submits directory information. IBM processes submissions, updates for use in the solution<br>API: Consumer |
| 3 | **Application level**<br>Employees, students provide health status data at check in. The solution presents data in Command Center dashboards for employer review and monitoring. |
| 4 | **Location management**<br>Employer updates location status (open, closed) and user statuses (return approved, not approved). |
| 5 | **Integrations, data sharing (optional)**<br>Your organization can add functionality and data sources to Return-to-Workplace Advisor through integrations. For information, see Integration and data sharing. |

## Figure: Basic data flow through the solution



# Integration and data sharing

Your organization can add functionality and data sources to Return-to-Workplace Advisor through integration and data. If you have questions about these integrations, contact your IBM team.

### Generating referrals through IBM® Watson Care Manager integration

IBM Watson Care Manager is a case management solution that supports contact tracing and integrated care for individuals through COVID-19 and beyond. Integrating Return-to-Workplace Advisor with Watson Care Manager can automatically generate referrals, for review by care managers.

Initially, this integration registers an employee or a student in Watson Care Manager, based on the User Directory submitted. This allows a contact tracer to quickly search for someone within the WCM application. For example, if the tracer is working with an employee or a student who has been diagnosed, the tracer can immediately search for people they identify they've been in close contact with, and identify them for follow-up.

In addition, through the integration, Return-to-Workplace Advisor sends a reason for the referral (for example, diagnosed, symptomatic level 1, or symptomatic level 2) to Watson Care Manager. When an organization submits an updated User Directory, the corresponding information for those individuals updates in Watson Care Manager, for example, email address or telephone number.

To integrate Watson Care Manager with Return-to-Workplace Advisor, your organization uses the Referral API.

IBM Watson Care Manager (https://www.ibm.com/products/watson-care-manager)

### Updating Work Pass, Campus Pass statuses using lab result data

Optional to Return-to-Workplace Advisor implementations is the use of lab result data. In use, employees or students see no lab results when using the respective support application. Here's how it works:

1. Your organization submits lab result data from molecular (viral) coronavirus tests to IBM.
2. The employee or student self-reports symptoms.
3. After Return-to-Workplace Advisor receives the submission, the product retrieves lab result data. Results are a factor in the logic used in processing a Work Pass or Campus Pass.
4. If the employee or student results include at least one new positive COVID test result, regardless of the lab result date from the vendor, this triggers a "not approved," lab-diagnosed pass status. In this situation:
    - An approved (green) status converts to not approved (red) status.
    - A not approved' (red) status retains the same status.

    A negative test result has no impact on pass status.
5. If the employee or student is not approved to return, the pass includes text that indicates that the resulting status is due to recent test results.

# Process overview

**Implementation**

Work with IBM to configure and implement the Return-to-Workplace Advisor:

1. Prepare required company data to support the applications, for example, staff and location information.
2. Select the configuration options that you want for the support application.
3. Set up authentication.
4. Work with IBM to have your implementation options set up.
5. Test the implementation, for example, to verify configuration and check data quality.

**Administration, on-going**

1. Update organization data, by submitting updated data files.
2. Perform other administration tasks, as needed.

# Working with IBM

Return-to-Workplace Advisor is a recent IBM product offering that's evolving quickly to meet a critical decision-making need for your organization. For this reason, you need to work collaboratively with IBM on implementation and administration. Please plan your time and resources accordingly, to make your deployment and our partnership successful.

**Scheduling**

To coordinate Return-to-Workplace Advisor updates, contact your IBM team.

# If you have questions

If you have questions about Return-to-Workplace Advisor implementation and administration, contact your IBM team.

# Submitting required data

Learn about preparing and submitting organization information required for IBM Return-to-Workplace Advisor. You'll submit this data by file:

- User Directory
- Site Directory

Submitting the Job Role Directory is optional.

## About data for implementation and administration

Implementing and administering the Return-to-Workplace Advisor solution involves submitting configuration files to IBM.

- **First-time setup during implementation:** You submit directories of required information, for example, for locations and employees or students. For procedures, see Preparing information for IBM.
- **Administration:** You submit additional and updated information. For procedures, see Administration.

After you submit your files, IBM processes them for use with your deployment.

## Preparing information for IBM

**To prepare data for implementation**:

1. Coordinate with your IBM team.
2. Prepare data as described in topics in this section. Use the static file layout appropriate to the file type.

**Note:** Make sure that you prepare all **required** data files needed for implementation. Some fields are optional.

3. Follow the requirements applicable to each file:

   Prepare the file using a spreadsheet application, for example, Microsoft® Excel®.

   Use a tab-delimited file layout.

   Submit files based on your frequency, as changes are expected, for example, daily or weekly.

   Include a header record as the first row in each file.

   IBM will provide the file naming convention specific to each file format.

4. Submit the file.

# User Directory

**Note:** Submitting a file that contains this data is required for implementation. For guidance, see Preparing this information for IBM.

This directory lists all users of either the Employee Support Application or the Student Support Application, along with the associated job role (optional) and site identifier. For enterprise (employer) customers, include only employee records in this file.

**Table 5 Format for the User Directory file**

| # | Field name | Data type | Maximum length | Required | Notes |
|---|---|---|---|---|---|
| 1 | Alternate User Identifier | Character | 100 | Conditional | Required when integrating User Directory data either with IBM Health Insights or with lab data sources. |
| 2 | Birth Date | Character | 10 | Conditional | Required for Command Center and Watson Care Manager (WCM).<br><br>MM/DD/YYYY format |
| 3 | Gender | Character | 1 | Conditional | Required for Command Center Analytics Application and, if integrated with Return-to-Workplace Advisor, IBM Watson Care Manager.<br><br>M = Male<br><br>F = Female<br><br>U = Unknown |
| 4 | User Identifier | Character | 100 | Required | This is the ID the customer website will pass to AppID during single sign -on. The User Identifier during single sign-on cannot be either the user's Social Security number or the user's email address. |
| 5 | First Name | Character | 100 | Required | |
| 6 | Middle Name | Character | 100 | Optional | |
| 7 | Last Name | Character | 100 | Required | |

| # | Field name | Data type | Maximum length | Required | Notes |
|---|---|---|---|---|---|
| 8 | Home Zip Code | Character | 5 | Conditional | Required for Command Center Analytics Application and, if integrated with Return-to-Workplace Advisor, Watson Care Manager.<br><br>Five-digit postal (ZIP) code of the home location. |
| 9 | Job Role Identifier | Character | 100 | Conditional | A code associated with the job role of the user. Required when the Job Role Directory file is used for employer customers. |
| 10 | Site Identifier | Character | 100 | Required | A code associated with a client site |
| 11 | Remote Indicator | Character | 1 | Optional | Not applicable for non-employer clients.<br><br>Employee works remotely (Y/N) |
| 12 | Delete Indicator | Character | 1 | Optional | Set field to Y to delete record. |
| 13 | Critical Infrastructure Worker Indicator | Character | 1 | Optional | Not applicable for non-Employer clients.<br><br>Value of Y or N to indicate if the role is essential according to the Centers for Disease Control and Prevention (CDC).<br><br>Only required with the User Directory file or the Job Role Directory file. |
| 14 | Required Indicator | Character | 1 | Required | Value of Y or N to indicate if the user is expected to report in person to their associated site.<br><br>Only required with the User Directory file or the Job Role Directory file. |
| 15 | Phone Number | Character | 100 | Conditional | Required for Watson Care Manager |
| 16 | Email Address | Character | 100 | Conditional | Required for Watson Care Manager |
| 17 | Filler | Character | 100 | | Reserved for future use |
| 18 | Filler | Character | 100 | | Reserved for future use |
| 19 | Filler | Character | 100 | | Reserved for future use |

| # | Field name | Data type | Maximum length | Required | Notes |
|---|---|---|---|---|---|
| 20 | Filler | Character | 100 | | Reserved for future use |
| 21 | Filler | Character | 100 | | Reserved for future use |
| 22 | Filler | Character | 100 | | Reserved for future use |

# Site Directory

**Note:** Submitting a file that contains this data is required for implementation. For guidance, see Preparing this information for IBM.

This directory lists all current sites (locations). For each physical address, set up a site record, for example, with a university campus, you can create a record for each residence.

**Important:** Make sure that you submit a complete Site Directory. To successfully incorporate employee or student data, there must be associated sites.

**Table 6 Format for the Site Directory file**

| # | Field name | Data type | Maximum length | Required | Notes |
|---|---|---|---|---|---|
| 1 | Site Identifier | Character | 100 | Required | |
| 2 | Site Description | Character | 100 | Required | Description corresponding to the Site Identifier code |
| 3 | Site Type | Character | 100 | Required | This field is used as a filter in the Command Center Analytics Application, for example, office, factory |
| 4 | Site Status | Character | 100 | Required | Value to indicate if a site is open or closed |
| 5 | Address Line 1 | Character | 100 | Required | |
| 6 | Address Line 2 | Character | 100 | Required | |
| 7 | State | Character | 2 | Required | Standard postal state abbreviation |
| 8 | City | Character | 100 | Required | |
| 9 | Zip Code | Character | 5 | Required | Five-digit postal (ZIP) code of the site |
| 10 | Delete Indicator | Character | 1 | Optional | Set field to Y to delete record |
| 11 | Filler | Character | 100 | | Reserved for future use |
| 12 | Filler | Character | 100 | | Reserved for future use |

| # | Field name | Data type | Maximum length | Required | Notes |
|---|---|---|---|---|---|
| 13 | Filler | Character | 100 | | Reserved for future use |
| 14 | Filler | Character | 100 | | Reserved for future use |

# Job Role Directory (submission optional)

**Note:** Submitting this file is **optional** for implementation. For guidance, see Preparing this information for IBM.

This directory lists job roles and an indication of employees or students that your organization identifies as essential.

**Table 7 Format for the job role directory file**

| # | Field name | Data type | Maximum length | Required | Notes |
|---|---|---|---|---|---|
| 1 | Job Role Identifier | Character | 100 | Required | |
| 2 | Worksite Identifier | Character | 100 | Required | Used to break the job roles that are required by worksite |
| 3 | Job Role Description | Character | 100 | Required | Description corresponding to the Job Role Identifier code |
| 4 | Critical Infrastructure Worker Indicator | Character | 1 | Optional | Value of Y or N to indicate if the role is essential according to the Centers for Disease Control and Prevention (CDC)<br><br>This is only required in the User Directory file or the Job Role Directory file. |
| 5 | Required Indicator | Character | 1 | Required | Value of Y or N to indicate if the role is required for business operations<br><br>This is only required in the User Directory file or the Job Role Directory file. |
| 6 | Delete Indicator | Character | 1 | Optional | Set field to Y to delete record |
| 7 | Filler | Character | 100 | | Reserved for future use |
| 8 | Filler | Character | 100 | | Reserved for future use |
| 9 | Filler | Character | 100 | | Reserved for future use |
| 10 | Filler | Character | 100 | | Reserved for future use |

# Configuring the support application

Learn about your configuration options for the support application you're using in Return-to-Workplace Advisor: the Return-to-Workplace Advisor or the Return-to-Campus Advisor. Select the options that you want.

## Preparing this information for IBM

**To prepare your configuration for implementation:**

1. Learn about the available configuration options.
2. Select the configuration options that you want.

**Tip:** Check the **blue columns** in the configuration topics. For example, you can print the topics, then note the options that you want.

3. Work with IBM to have your configuration set up.

# Application domain in the web address, URL

You can configure the domain section of the web address (URL) for the Return-to-Workplace Advisor applications, including the support application and administrative console. To identify the application, you might want to use the domain name for your organization's web site.

**Figure: Web address for the support application**

```
https://<Domain>.returntoworkplaceadvisor.watson-health.ibm.com/
```

## What you can configure

**Table 8 Options for the application URL**

| Option | | Your configuration |
|---|---|---|
| **Domain** | Configurable name in the application URL | |

# Check-in page

You can configure whether employees or students can recall (undo) a check-in, for example, after making a mistake. Typically, a check-in can be recalled within 10 minutes after submitting. With this option disabled, the **Recall** button does not appear on the Check-in page, next to the Submit **button**.

## What you can configure

**Table 9 Options for check-in page**

| Option | | Your configuration |
|---|---|---|
| **Recall option, button** | Employee, student cannot recall check-in | ❑ On<br>❑ Off |

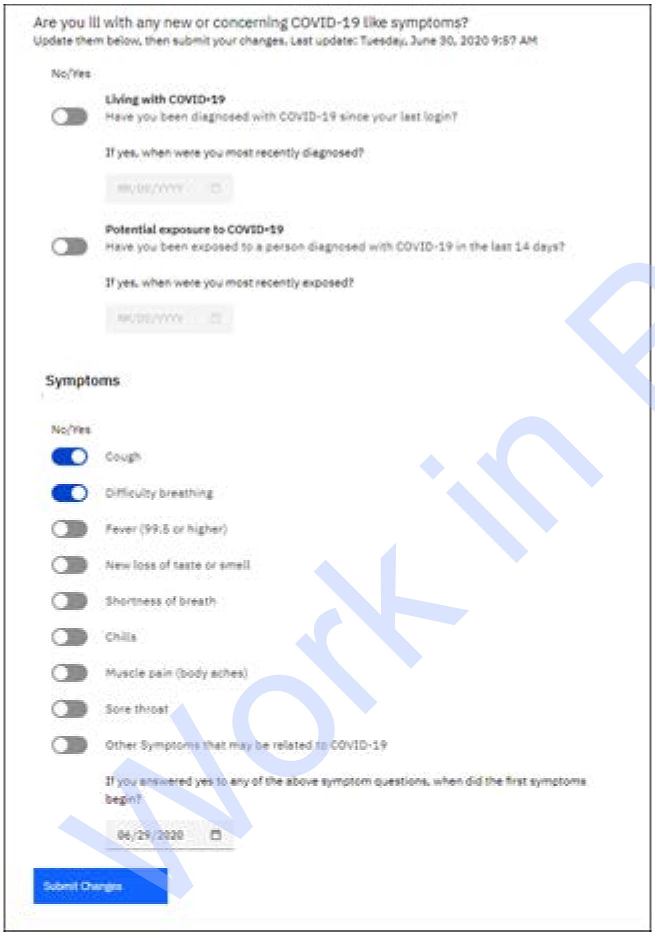
# Check-in questions

You can configure which questions employees or students answer during self-reporting about their individual health status. Employers use answers to these questions to determine individual status about returning to work or school.

**Recommended:** Communicate effectively. In preparing this information for the support application, be as transparent as possible regarding your organization's policies.

**Note:** These questions are not intended to diagnose whether employees or students have a condition.

**Figure: Check-in questions in the support application, U.S. version (subject to change)**



## What you can configure

**Table 10 Options for check-in questions**

| Option | | Your configuration |
|---|---|---|
| **Display diagnosis question** | Employee, student indicates whether he or she has been diagnosed with COVID-19 since the previous login to the support application<br><br>Yes or no answer. If Yes, then the employee or student is prompted for the diagnosis date.<br><br>**Note:** The application considers this a major symptom. If an employee answers **Yes** to this question, then the employee cannot use self-clearance. However, your organization has the option of allowing self-clearance for all questions.<br><br>For information about symptom levels, see Symptoms. | ❑ On<br>❑ Off |
| **Custom diagnosis question** | Working with IBM, you can set up custom question text.<br><br>For more information, contact your IBM team. | |
| **Display exposure question** | Employee, student indicates whether he or she has been exposed to a person with COVID-19 since the previous login to the Employee Support Application<br><br>Yes or no answer. If Yes, then employee is prompted for the exposure date.<br><br>**Note:** The application considers this a major symptom. If an employee answers **Yes** to this question **and** a symptom, then the employee cannot use self-clearance. For information about symptom levels, see Symptoms. | ❑ On<br>❑ Off |

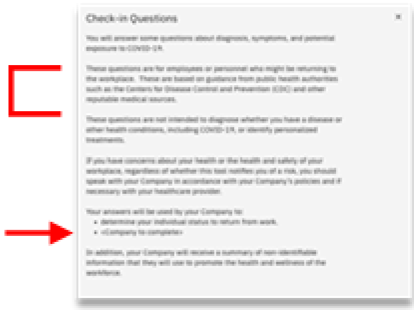
| Option | | Your configuration |
|---|---|---|
| **Custom exposure question** | Working with IBM, you can set up custom question text.<br>For more information, contact your IBM team. | |
| **Display a set of symptom questions** | Employee, student indicates whether he or she currently has symptoms that might be related to COVID-19, for example, cough, difficulty breathing.<br>To configure which symptoms to display, see Symptoms.<br>Yes or no answers. If Yes, then employee is prompted for the date for the onset of symptoms. | ❑ On<br>❑ Off |

# Check-in text

Configure disclaimer text that appears with the Check-in page.

**Important:** For legal reasons, it's important that you include the appropriate text for your organization.

**Figure: Check-in text (subject to change)**




## What you can configure

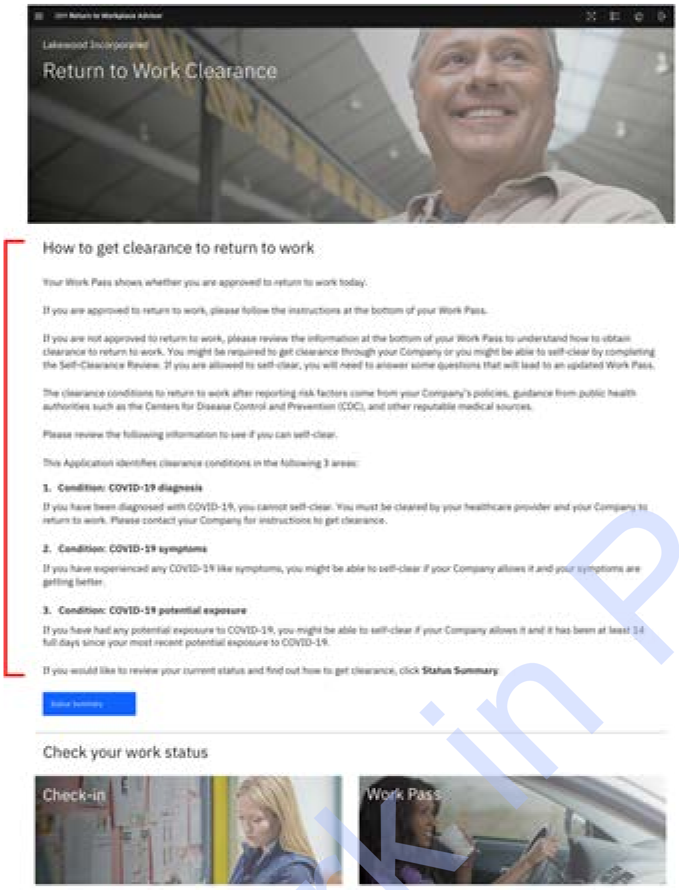
**Table 11 Options for check-in text**

| Option | | Your configuration |
|---|---|---|
| **Disclaimer text** | Use to explain the purpose or to provide further background for the check-in questions | |
| **Usage text** | Describes how your organization uses answers to the check-in questions | |

# Clearance page

You can configure text that appears on the Clearance page in the support application. The page explains how to get clearance to return to work or school. You can configure text for the clearance conditions, for example, to reflect your organization's policies.

**Figure: Clearance page in the support application (subject to change)**




## What you can configure

**Table 12 Options for the Clearance page**

| Option | | Your configuration |
|---|---|---|
| **Clearance, text, conditions** | Text that typically includes the instructions and clearance conditions | |

# Clearance status summary

You can configure text that appears on the Clearance status summary in the support application. The summary provides text that you can configure to provide, for example, follow-up guidance for employees or students.

**Figure: Clearance status summary in the support application (subject to change)**


## What you can configure

**Table 13 Options for the Clearance status summary**

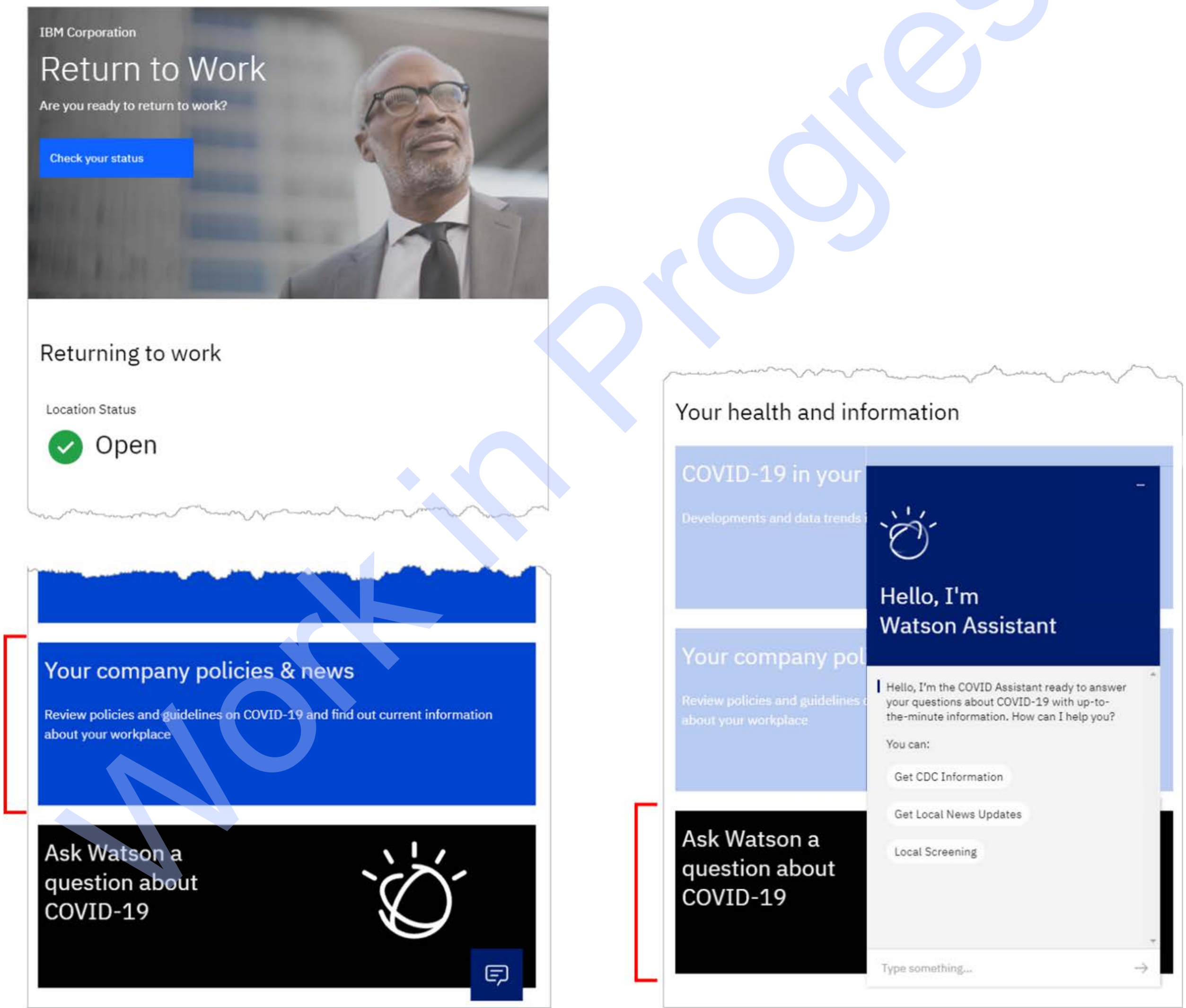
| Option | | Your configuration |
|---|---|---|
| **Policy text** | Text that appears in the lower section of the summary | |
| **Logic** | IBM can configure:<br>• The logic used to determine which employees or students can use self-clearance<br>• Company contact information used in the policy text | Contact your IBM team. |

# Home page

You can configure selected features on the home page for the Employee Support Application (enterprise version) and Student Support Application (campus version). As needed:

- Link to policy and news resources that you want to provide employees or students
- Provide access to IBM® Watson Assistant, a conversational AI chatbot that can help employees or students get answers to relevant questions. Examples of these questions include Should I wear a mask? and Where can I get tested for COVID-19?

**Figure: Policy, Watson Assistant features on the home page (subject to change)**



## What you can configure

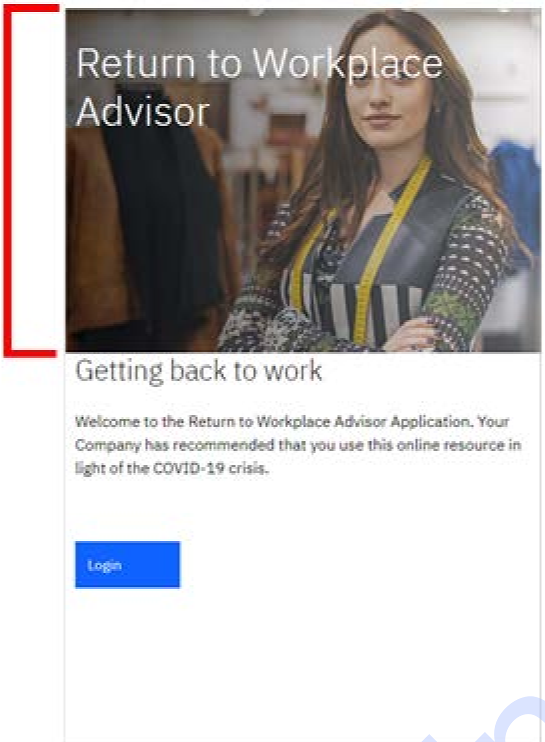
**Table 14 Options for the Home page**

| Option | | Your configuration |
|---|---|---|
| **Policy feature** | Whether to display the policy panel | ❑ On<br>❑ Off |
| **Policy links** | URLs to organization resources | |
| **Watson Assistant** | Whether to provide Watson Assistant access | ❑ On<br>❑ Off |

# Login page

You can configure the logo image that appears on the login page in the support application. This helps identify your organization.

**Figure: Login page in the support application (subject to change)**




## What you can configure

**Table 15 Options for the Clearance page**

| Option | | Your configuration |
|---|---|---|
| **Images** | Image that appears on the page used to log in | |

# Modules for check-in, passes

You can configure whether the support application uses the check-in functionality and the pass-related functionality.

**Note:** These options have a sizable impact on the application. If you have questions, contact your IBM team.

## What you can configure

**Table 16 Options for application modules**

| Option | | Your configuration |
|---|---|---|
| **Check-in module** | Whether to enable the module in the support application | ❑ On<br>❑ Off |
| **Work Pass, Campus Pass module** | See above | ❑ On<br>❑ Off |

# Self-clearance text

You can configure question text that appears on the self-clearance page.

**Figure: Self-clearance text (subject to change)**

## What you can configure

**Table 17 Options for self-clearance text**

| Option | | Your configuration |
|---|---|---|
| **Question text** | Use to ask about symptoms | |

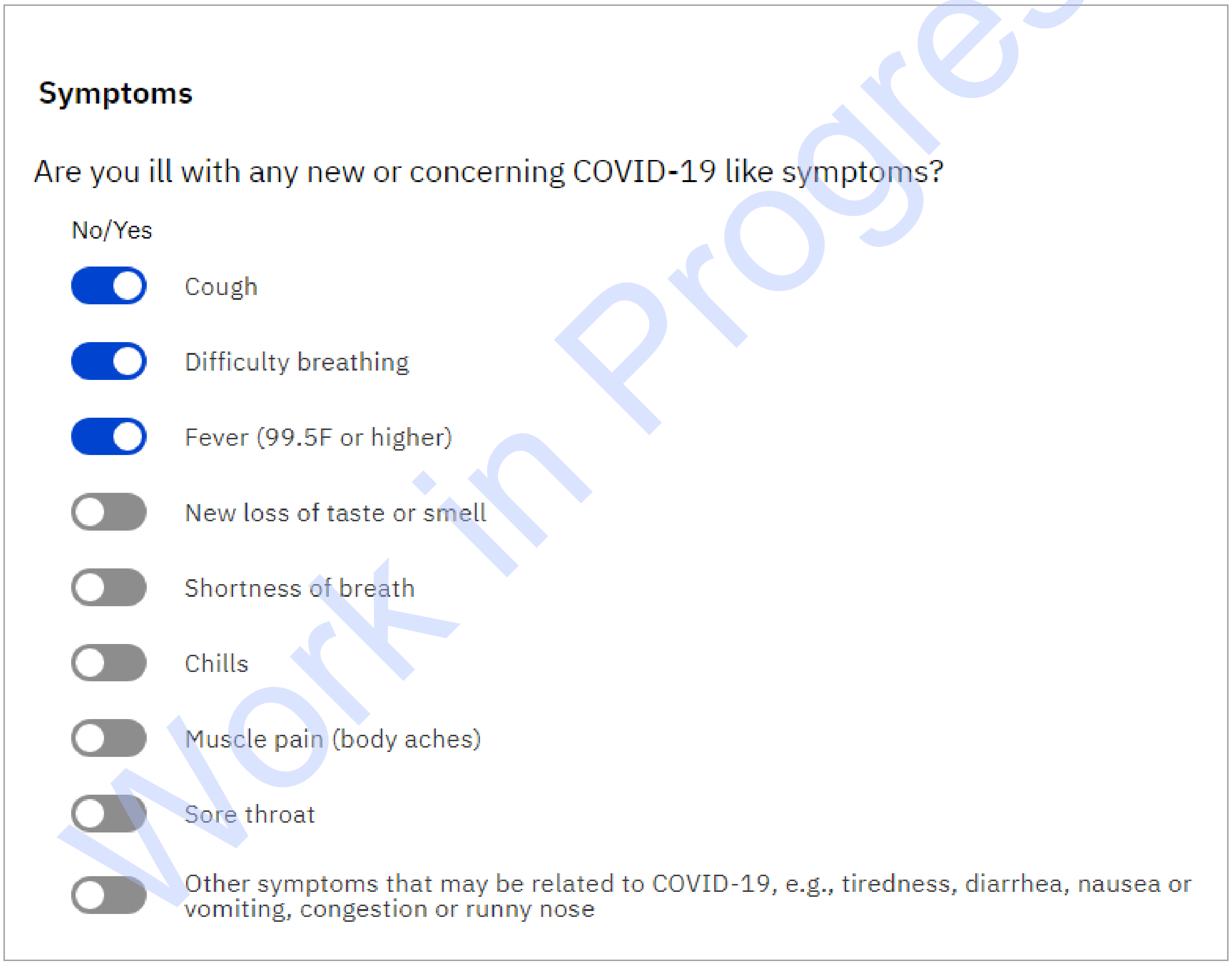
# Symptoms

You can configure which symptoms appear in check-in questions during employee or student self-reporting. In addition to standard symptoms, you can set up custom symptoms that you define by working with IBM.

### About the symptom levels

When you enable a symptom, you specify whether it's a **major symptom** (**Level 1**) or a **minor symptom** (**Level 2**). These levels help determine whether the employee is identified as approved to return to work, in the employer's Command Center Analytics Application. The **Level 1** and **Level 2** designations are from the Centers for Disease Control and Prevention.

**Figure: Symptoms in the support application (subject to change)**



## What you can configure

**Note:** This list is based on symptom information from the Centers for Disease Control and Prevention (CDC), and is being continuously updated. If you have questions, contact your IBM team.

**Table 18 Options for the symptoms list**

| Option | | Your configuration |
|---|---|---|
| **1. Standard symptoms** | | |
| **Chills** | Does the employee or student currently have this symptom?<br>Yes or no answer | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Congestion or runny nose** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Cough** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Diarrhea** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Dizziness** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Fatigue** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |

| Option | | Your configuration |
| --- | --- | --- |
| **Fever** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Headache** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Loss of appetite** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Muscle pain (body aches)** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Nausea or vomiting** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **New confusion** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **New loss of taste or smell** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Repeated shaking with chills** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom |

| Option | | Your configuration |
|---|---|---|
| | | ❑ Off |
| **Shortness of breath** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Sore throat** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **Other symptoms that might be related to COVID-19** | See above | ❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |
| **2. Custom symptoms** | | |
| | Working with IBM, you can set up custom symptoms. Specify the name for each.<br>For more information, contact your IBM team. | Name:<br>________________<br>❑ On +<br>❑ Major symptom<br>❑ Minor symptom<br>❑ Off |

# Terms of use

Configure the legal disclaimer text displayed in the terms of use panel. This information appears for employees or students during first-time login to the support application.

**Important:** For legal reasons, it's important that you include the appropriate text for your organization.

**Figure: Terms of use panel (subject to change)**


## What you can configure

**Table 19 Options for Understanding Your Risk**

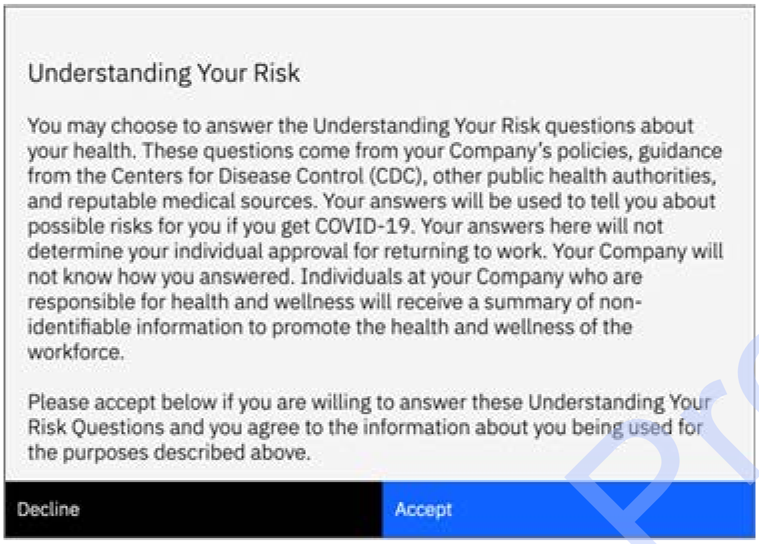
| Option | | Your configuration |
|---|---|---|
| **Terms of use text** | Text that appears in the panel | |

# Understanding Your Risk text

You can configure text in Understanding Your Risk, a step displayed to employees or students during first-time login to the support application.

**Recommended:** Communicate effectively. In preparing this information for the support application, be as transparent as possible regarding your organization's policies.

**Figure: Understanding Your Risk panel (subject to change)**




## What you can configure

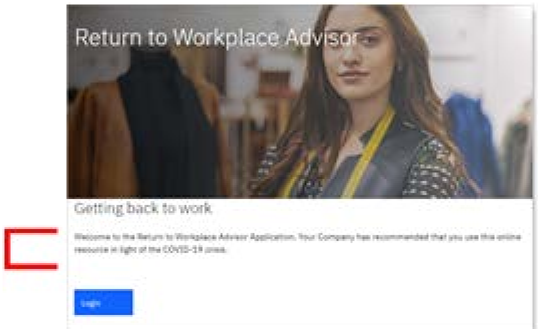
**Table 20 Options for Understanding Your Risk**

| Option | | Your configuration |
|---|---|---|
| **Enable, disable** | Whether to display Understanding Your Risk during first-time login | ❑ On<br>❑ Off |
| **Risk text** | Text that appears in the panel | |

# Welcome page

You can configure text that appears on the Welcome page in the support application. You can use this to explain your organization's policies, for example, the frequency for check-ins.

**Figure: Welcome page in the support application (subject to change)**




## What you can configure

**Table 21 Options for the Clearance page**

| Option | | Your configuration |
|---|---|---|
| **Text** | Descriptive text | |

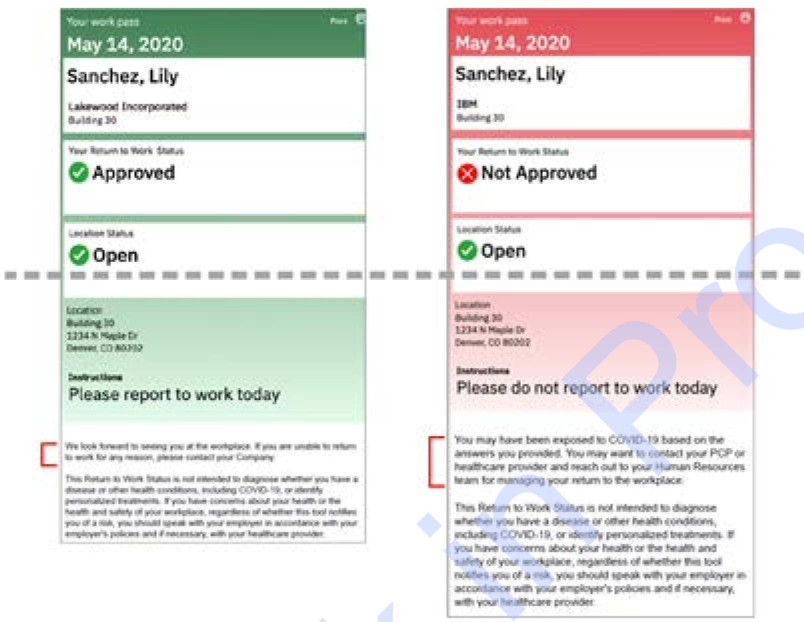
# Work Pass, Campus Pass

You can configure items that appear on the employee Work Pass or student Campus Pass. The pass indicates the employee or student return status and the location status. The printed version of the pass includes text that your organization configures.

**Note:** In the figure, the area above the dotted line indicates the approximate area shown on mobile devices, prior to scrolling.

The example shows the pass as displayed on a mobile device, that is, without a banner image.

**Figure: Pass example (subject to change)**




## What you can configure

**Note:** Plan your text configuration carefully. Avoid redundant or contradictory messages.

**Table 22 Options for Work Pass, Campus Pass features**

| **Option** | | **Your configuration** |
|---|---|---|
| **Green pass** | | |
| **1. Standard messages (always appear on pass)** | | |
| | General, approved informational message | 4,000-character limit |
| | Disclaimer, pass is not a diagnosis | Above |

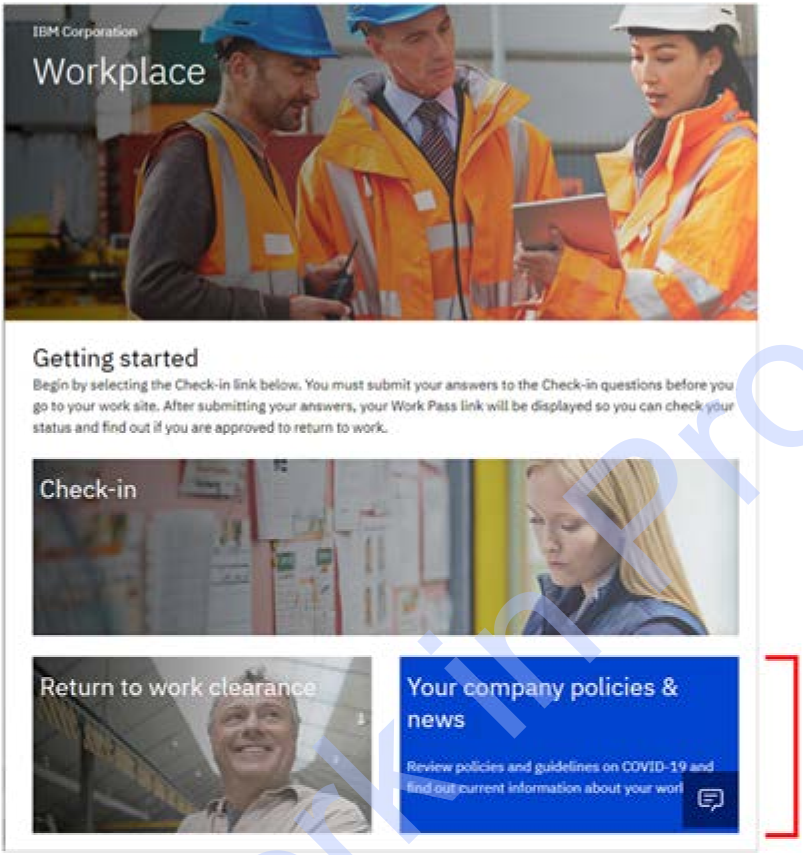
| Option | | Your configuration |
| --- | --- | --- |
| **2. Optional messages (appear on pass if applicable)** | | |
| | Approved message for essential, critical infrastructure employees, students | 4,000-character limit |
| **Red pass** | | |
| **1. Standard messages (always appear on pass)** | | |
| | **(a)** Clearance by organization required informational message (no self-clearance) | 4,000-character limit |
| | **or** | |
| | **(b)** Self-clearance allowed informational message (clearance by organization not required) | Above |
| | Disclaimer, pass is not a diagnosis | Above |
| **2. Optional messages (appear on pass if applicable)** | | |
| | Lab results, not approved message. For information about lab results data, see Integration and data sharing. | 4,000-character limit |
| | Contact tracing, not approved message | Above |
| | Diagnosed with COVID-19, based on self-reporting | Above |
| | Major symptoms (Level 1) , based on self-reporting | Above |
| | Minor symptoms (Level 2) , based on self-reporting | Above |
| | Potential exposure, based on self-reporting | Above |
| | Emergency symptoms, based on Centers for Disease Control and Prevention (CDC) | Above |

# Workplace, Your School page

You can configure selected features on the Workplace page (enterprise), or Your School page (campus). As needed:

- Link to policy and news resources that you want to provide employees or students

**Figure: Policy features on the support application Workplace, Your School page (subject to change)**




## What you can configure

**Table 23 Options for the Workplace, Your School page**

| Option | | Your configuration |
|---|---|---|
| **Policy feature** | Whether to display the policy panel | ❑ On<br>❑ Off |
| **Policy links** | URLs to organization resources | |

# Setting up authentication

Learn how your organization works with IBM to integrate IBM Return-to-Workplace Advisor or Return-to-Campus Advisor into its employee or student workflow. To use the application, a user must be authenticated and must accept the terms of use. This information describes the required integration work.

## System requirements

Here are minimum system requirements for single sign-on integration with the Return-to-Workplace Advisor web application.

**System requirements for the customer server**

- Must have an Identify Provider that supports SAML 2.0 Federated single sign-on (SSO)
- Must be able to send and receive web service requests over HTTPS (Port 443) – TLS 1.2
- Firewall must be open to outbound traffic

## Authentication overview

**IBM SAML integration**

IBM supports federated single sign-on (SSO) using the SAML 2.0 protocol. SAML 2.0 is the preferred methodology to support SSO between the customer portal and web-based tools hosted by IBM. When a user opens the support application, the SAML protocol login is always triggered. Single sign-on based on SAML 2.0 requires data information exchange between the technical support teams of the customer and IBM:

- You, as an IBM customer, host a web site or portal access point and SAML Identity Provider (IdP) software.
- IBM hosts SAML Service Provider (SP) software and the desired web application.

**Security**

SAML assertions are sent securely using the HTTP POST SAML 2.0 profile. Requests are sent SSL encrypted (https). In addition, SAML assertions must include a valid digital signature.

# Providing authentication information

To integrate the Return-to-Workplace Advisor with your organization's web site, you must provide authentication information to IBM about your SAML Identity Provider (IdP).

**Table 24 Required authentication information for integration**

| Item | Notes |
|---|---|
| **Identity provider entity ID** | |
| **Identity provider sign-in URL** | |
| **Identity Provider Digital Signature Certificate** | Privacy Enhanced Mail (PEM), Base64 format |
| **Identity provider metadata (XML)** | |
| **SAML attributes** | The SAML assertion must contain at least one attribute that can be used to uniquely identify the employee or student being signed in, for example, the Employee_ID or Employee_Number. |

# Testing and production

After you've completed previous steps in implementation, work with IBM to test your deployment and put Return-to-Workplace Advisor into production.

## Process overview

Work with IBM during testing and preparation to production (go live):

1. Consider scheduling, so your organization can complete testing and allow employees or students to promptly start check-ins.
2. Complete testing and validation with the appropriate resources in your organization.
3. Coordinate data loading with IBM.

   If your implementation includes Watson Care Manager, allow time to transfer User Directory records to transfer to it.
4. Check any configuration changes to the support application.
5. Communicate with employees or students, provide access to the support application.

## Completing testing and validation

Typical steps in this process include:

- **Validate your custom configurations.** For example, make sure that text that you've provided reads as intended.
- **Make sure that the application meets your use cases.** Verify that the actions between a user and the application achieve your organization goals.
- **Check the data quality.** Validating application data can, in some cases, include information provided through an application programming interfaces (APIs).
- **Review Work Pass or Campus Pass information.** Make sure that it reads correctly.

You'll work with IBM and, typically, use a user acceptance testing environment. This environment is separate from demonstration and production environments. You'll need to determine the number of users from your organization that can participate in testing. The goal is to work toward a quick, successful roll out of Return-to-Workplace Advisor to production.

For more information, contact your IBM team.

# Accessing the Command Center Analytics Application

Use these steps to open the Command Center Analytics Application. For information about using the Command Center features, see Using the Command Center Analytics Application.

**To access the Command Center:**

1. From a desktop computer, open a web browser.

   To check supported browsers, see Supported web browsers and mobile devices.
2. Either copy and paste or type the address:

   **https://<*Domain*>.returntoworkplaceadvisor.watson-health.ibm.com/analytics/**

   where ***Domain*** is the domain that your organization uses for the product. For more information, see Application domain in the web address, URL.
3. Enter your username and password.
4. Click **Login**. The Command Center opens.

When you're done using the Command Center, click **Sign Out**.

**Note:** Signing out is important to help secure your organization's information.

# Accessing the support application

Use these steps to open the Employee Support Application (enterprise) or Student Support Application (campus). For more information, see Supported web browsers and mobile devices.

**To access the support application:**

1. Open a web browser.
2. Either copy and paste or type the address:

   **https://<*Domain*>.returntoworkplaceadvisor.watson-health.ibm.com/employee/**

   where ***Domain*** is the domain that your organization uses for the product. For more information, see Application domain in the web address, URL.
3. Click **Sign In**. The application opens.

When you're done using the application, click the log out icon in the menu bar.

**Note:** Signing out is important to help keep information secure.

# Getting users started with the support application

When your organization is ready to go live with the Return-to-Workplace Advisor or Return-to-Campus Advisor solution, your organization needs to communicate with employees or students about their next steps.

**Note:** Follow your organization's policies regarding communications and guidance.

**Communicating**

- Notify employees or students that they start completing health check-ins.

  Explain that check-ins determine when locations reopen and when they can return.
- Communicate your organization's start to for check-ins and how frequently these must be completed.
- Explain that your organization decides when to reopen locations and whether to allow specific employees or students to return.
- Indicate that information on the Work Pass or Campus Pass communicates location and return statuses.
- Assure users that check-ins are quick and easy to complete, using the support application.
- Clearly explain your privacy policy regarding health information, for examples, the current symptoms reported.
- Provide the link to the support application.

  For example, in your notification email, provide the link. Alternately, for quick access on mobile devices, your organization might prepare a QR code containing the link.

# Using the Command Center Analytics Application

As a location coordinator using IBM Return-to-Workplace Advisor or Return-to-Campus Advisor, you can use the Command Center Analytics Application to assess workplace and community risk data in near real time. Identify the locations where conditions have been met to return to the enterprise or campus. For an overview of features, see the Command Center Analytics Application.

## Exploring and deciding

Your goals include monitoring workplaces or schools, assessing conditions, and making important decisions about locations and people. Using the Command Center Analytics Application, you'll:

- Explore status information for locations, for example, open or closed
- Compare locations
- Check trends
- Review community risk in geographic areas
- Assess workforce availability, based on employee or student check-ins and self-reporting

**Note:** Keep in mind that the Command Center is a planning tool, intended to help you make decisions. Do not consider it a medical tool, as a source of strictly medical advice.

# About the data sources and methodologies

In Return-to-Workplace Advisor and Return-to-Campus Advisor, the Command Center Analytics Application displays analytics, risk, and trending information based on IBM methodologies and various data sources.

## Data sources

**Table 25 Sources of Command Center data**

| Type of data | Source |
|---|---|
| Location status data<br>Data for workforce availability risk from Work Passes, Campus Passes<br>Data for percentage of workforce with COVID-19 diagnosis<br>Data for recent exposures to COVID-19, symptomatic | IBM® Return-to-Workplace Advisor |
| Reported daily COVID-19 case and death data at the county level, county population<br>Data for community risk | IBM® Weather Company data |
| Symptoms | The Centers for Disease Control and Prevention (CDC) |

## Methodologies

IBM developed these methodologies for use with Return-to-Workplace Advisor.

### Community (Epidemiology) Risk methodology

This methodology provides criteria for an employer to understand COVID-19 risks in a community, and to assist with decisions related to returning to a workplace or campus. The methodology assigns risk ratings in a range from 1 (safer) to 6 (unsafe). These indicate how well-controlled cases are in the community. Data is based on new cases in the last three weeks.

**Table 26 Risk ratings in the Community Risk methodology**

| Level | Description |
|---|---|
| 1 | Recent two-week cases under strict control and non-increasing within thresholds |
| 2 | Recent two-week cases under strict control but volatile **or** cases under soft control and decreasing |

| Level | Description |
|---|---|
| 3 | Cases under soft control but not decreasing |
| 4 | Cases not under control but decreasing well |
| 5 | Cases not under control and still volatile |
| 6 | Cases not under control and increasing |

### Community Risk Prediction methodology

This methodology uses advanced epidemiological models combined with AI to project COVID-19 cases at the state and county levels. As part of predictive community risk capability, IBM provides the following outputs at the state and county level:

- 14-day ahead, daily positive case predictions with uncertainty intervals
- 14-day ahead, daily death prediction with uncertainty intervals
- One-week ahead and two-week ahead risk levels (1 - 6), based on predictions and recent history

### Workforce Availability Risk methodology

This methodology identifies workplace and campus transmission risk. It is based on the percentage of employees or students with a recent change from approved status (**green**) to not approved status (**red**), due to symptoms and exposure risks in the previous three working days. Based on this percentage and the total number of employees or students at a location, the methodology assigns a rating of Low, Medium, or High.

### Workplace Status methodology

This methodology classifies a workplace status to **green** or **red** based on Community Risk ranking and Workforce Availability Risk rating. By default, the workplace is set to red when the Community Risk ranking is greater than 4 and/or the Workforce Availability Risk rating is greater than High. Customers can change the default settings by working with IBM.

## For more information

In the Command Center Analytics Application, at the below left, click **Learn More**.

# Selecting a location

To start with the Command Center Analytics Application, select a location, for example, an office workplace or a campus. Your organization defines these using a Site Directory.

**To select a location:**

1. Open the Command Center. For steps, see Accessing the Command Center Analytics Application.

2. On the **Exploring and comparing workplaces** tab, from the **Workplace Type** drop-down list box, select the location type, for example, **Retail**.
3. To find a location in a defined area (for example, a city), under **Search for a workplace**:
    - Click the down arrow, then select the location.
    - Type the first letters of the location name, then select from the list that appears.

The map zooms in to the geographic location you selected.

# Navigating the map

You can easily navigate the Command Center map. Use navigation buttons, the mouse, or keyboard commands.

**Table 27 Navigating methods**

| To do this... | Do this... |
|---|---|
| Move or pan the map. | Drag the map in the direction that you want. |
| Zoom in. | Click the plus sign (**+**) at the map's top left corner.<br>Scroll the mouse button up.<br>Press the plus key (+). |
| Zoom out. | Click the minus sign (**-**) at the map's top left corner.<br>Scroll the mouse button down.<br>Press the minus or hyphen key (-). |
| Zoom in to a specific area. | Press the Shift key and drag a rectangle around your area of interest. |



# Checking the location status

After you select a location on the **Exploring and comparing workplaces** tab, you can quickly determine the status. When you check location status information, the map is typically your starting point.

## Workplace, campus status

**Check the location's color on the map.**

The location colors on the map reflects the status. The status is a combination of community risk and workforce availability risk. The workplace statuses appear **green** (open), **red** (closed), and gray (inadequate data). A location is red when either the community risk or the workforce risk exceeds its respective preset threshold.

**Display status summary information.**

On the map, click the location. Top trends and updated status information appear next to the map. An **unknown status** indicates that inadequate data is available.

## Community risk status

**Check the risk level.**

Note the county and state colors on the map. Refer to the accompanying color key to identify high risk and low risk. At right, under Community Risk, you can check for any change in risk level. Compare the current risk level (1 - 6). Following that, next to **Yesterday**, you'll see the previous day's risk level.

# Checking top trends

You can focus your attention locations that are trending upward or downward in risk. On the **Exploring and comparing workplaces** tab, the **Top trends** information is based on a comparison of current location statuses to statuses from the previous working day. The top five locations listed are in the state for the selected location.

By comparing, Return-to-Workplace Advisor produces alert scores which, in turn, are ranked in **Top trends**. Scores are based on changes in location status, for example, from closed (**red**) to open (**green**).

**Note:** If your organization does not use the Employee Support Application or the Student Support Application, **Top trends** does not include workforce availability.

**Check trending locations.**

To check the location associated with a trend, click **Visit on map**.

**Understand the amount of change.**

To check the rate of change in trending, look at the **Status change** chart. The chart shows recent changes over time. You can compare the current workplace statuses to yesterday's status and the status from seven days earlier. The horizontal (x axis) shows the percentage of locations with a particular status. To check the actual number of locations with a given status, hover the pointer over a chart bar.

# Comparing locations

Comparing workplace or school locations can help you with making decisions about returning. For example, by comparing, you can determine which locations currently need the most attention. On the **Exploring and comparing workplaces** tab, check the **Compare Workplaces** chart.

**Each bubble is a location.**

Chart bubbles correspond to the workplace locations that you've selected. After you select a location, the chart includes bubbles in that location's state.

- **Bubble size:** This is determined by the number of employees or students at the location.
- **Bubble color:** Generally, this indicates the workforce availability risk. However, if no data is available from the support application, then the color indicates the trend in community risk.

To compare different locations, you can select another workplace type.

**Tip:** Hover the pointer over a bubble. The hover text displays the location name and the percentage from the vertical line (Y axis). If you hover the pointer over a vertical line, you can see this information, including for multiple locations that have the same percentage.

**Note the COVID-19 percentage.**

In the chart, bubble placement on the vertical line (Y axis) indicates the percentage of employees or students at the location with suspected or confirmed cases, along with anyone at the location that is not using the support application. This is based on employee or student responses at check-ins, to symptom and exposure questions.

**Assess whether conditions are favorable.**

Look at the bubble position based on the chart's axes. Note the position relative to the **Most favorable** label (lower risk) and the **Least favorable** label (higher risk).

**Check the workforce availability risk.**

Availability is based on the percentage of employees or students that have approved (**green**) Work Passes or Campus Passes. To identify high risk and low risk, refer to the accompanying color key.

**Note:** If your organization does not use the Employee Support Application or the Student Support Application, workforce availability does not appear on this tab.

**Review the community risk.**

The **Compare Workplaces** chart indicates this risk along one axis. For information about community risk, see About the data sources and methodologies.

**Tip:** Next to the map, check the risk information for the selected location's rating and trend.

# Checking location details

Explore more-detailed information about conditions at a location. By reviewing incidence (occurrence of disease cases) and details on community risk and workforce availability, you can make more-informed decisions regarding location management. To display this information, click the **Understanding a workplace's conditions** tab.

**Review newly reported cases.**

To review the number of daily reported and suspected cases at the workplace, check the **Timeline of daily new incidence** chart. This contains information about cases and mortality (deaths). In the chart, the solid lines show historic values, while the dotted lines show projections beyond the current date.

- **Workplace indicators** are based on employee or student responses at check-ins, to questions about recent travel and about potential exposure to COVID-19.
- **Community indicators** are based on geographic reporting in product data sources.

**Tip:** Make the chart easier to read. You can include or exclude chart information by selecting or clearing check boxes as needed. To display details for a timeline date, hover the pointer over the date's vertical line (y axis).

**Check community risk details.**

In the **Community risk details** section, check the details for indicators. Indicators for different regional areas give you a better idea of conditions in the community around a location. To identify high risk and low risk, refer to the accompanying color key. Also, check the **Level** numbers, which includes the current rating. At the state level, you'll see predictive ratings for the forthcoming one-week and two-week periods. The Community Risk methodology produces these ratings.

At each regional level, review:

- The doubling time in days of cumulative positive cases reported today
- Trending in daily positive tests, that is, the number of reported new cases per day, over the last 14 days
- Rate of average daily reported new cases scaled to a population of 100,000
- Rate of average reported new deaths scaled to a population of 100,000
- Arrows indicate favorable or unfavorable trends in all metrics. An up arrow (**green**) is favorable, indicating a reduction in seven-day average cases. A down arrow (**red**) is unfavorable, indicating a reduction in doubling time.

**Check details for workforce availability risk.**

In the **Workforce availability risk details** section, check the risk of the workforce not being available due to workplace disease transmission. Review the number of employees or students that are eligible, that is, self-reported health status by checking in. In the **Workforce status** section, compare the percentage available today with the percentage available a week ago. Percentages are derived from the number of green passes (approved) and red passes (not approved).

To identify status, refer to the accompanying color key. **Unavailable** includes administrative overrides.

To update the chart, select or clear check boxes as needed. To check the actual number of passes for a given status, hover the pointer over a chart bar.

**Check details about unavailable employees, students.**

The **Details** chart includes a breakdown of the total number of unavailable employees or students, based on self-reporting. Data is sorted by severity and includes administrative overrides.

**Tip:** Focus chart data. You can include or exclude chart information by selecting or clearing check boxes as needed. To display details for a chart section, hover the pointer over it.

**Check details for another location.**

When you're done reviewing details on this Command Center Analytics Application tab, click the **Exploring and comparing workplaces** tab. Browse to and select the location that you want.

# About eligible employees, students

As you review information in the Command Center Analytics Application, it's helpful to keep in mind the categories for employees or students.

### Eligible employees, students

These include everyone in the User Directory, meaning that they can self-report using either the Employee Support Application or the Student Support Application.

Eligible employees or student can include those identified as required or essential.

### Required employees, students

These are defined by your organization in the User Directory. These definitions can change over time, for example, based on business needs or recovery from infection.

**Note:** If an organization does not identify required employees or students, then all directory members are considered required.

### Essential employees, students

These are defined by your organization in the User Directory. Essential employees or students have special status and consideration in Return-to-Workplace Advisor in issuing Work Passes or Campus Passes.

**Note:** If an organization does not identify essential employees or students, then all directory members are considered non-essential.

# Administration

Complete administrative tasks related to the IBM Return-to-Workplace Advisor.

## Submitting files to IBM

On an as-needed basis, you can submit files for use with either Return-to-Workplace Advisor or Return-to-Campus Advisor. To transmit files, you'll use a secure connection to the Healthcare Data Transmission System at IBM Watson Health. Several file submission options are supported, including SFTP and web submission. Watson Health adheres to HIPAA (Health Insurance Portability and Accountability Act) standards regarding the transmission of medical data, including authenticating users and encrypting transmissions.

**Note:** Before proceeding, make sure that you have the separate Watson Health document *Data Transfer Options and Requirements*. The document describes the submission steps and requirements.

**Table 28 Timing considerations**

| General scheduling | File considerations |
|---|---|
| **Submit files during regular business hours.** IBM systems for Return-to-Workplace Advisor are offline during the scheduled monthly downtime.<br><br>**Note scheduled downtime.** The Healthcare Data Transmission System (MOVEit) downtime occurs during the first full weekend of the month, Friday 5 PM Eastern Time through Sunday 11 AM Eastern Time. | **Override files**: Allow approximately 20 minutes after submitting for processing to complete before the status change takes effect. |



**To submit a file:**

1. Make sure that your file is prepared correctly.

   Follow the guidance in this document and, if necessary, in the separate document *Data Transfer Options and Requirements*.

2. Submit the file.

   Use the procedures in *Data Transfer Options and Requirements*.

# Opening or closing locations

During routine Return-to-Workplace Advisor use, you can open and close locations on an as-needed basis.

**To open or close locations:**

- Resubmit a Site Directory file, specifying the appropriate Worksite Status for each location. For steps, see Site Directory.

# Setting the location type

You specify the location type (for example, office or campus) for use with the Command Center Analytics Application. When you work with the Command Center, you use the **Workplace type** drop-down list box to filter information for **All** types or a particular type.

**To set the location type:**

- Submit a Site Directory file with the Worksite Type set for the type that you want for each location. For more information, see Site Directory.

# Identifying essential employees, students

In the Return-to-Workplace Advisor solution, you can identify employees or students that you deem essential or critical. For example, your workplace might have certain workers in critical roles to business functioning. When you assign essential status:

- Return-to-Workplace Advisor includes this factor and applies it when issuing a Work Pass or Campus Pass.
- You group employees or students for monitoring using the Command Center Analytics Application. When you work with the Command Center, you use the **Workforce - Required or not?** drop-down list box to filter information for **All** types or a particular type.

**To identify essential employees, students:**

- Submit a User Directory file with the Critical Infrastructure Worker Indicator set for the appropriate employees or students.

# Adding employees, students

After implementing Return-to-Workplace Advisor, you can add employees or students on an as-needed basis.

**To add employees or students:**

- Resubmit a User Directory file, containing information for the employees or students that you want to add. For steps, see User Directory.

# Overriding return statuses

You can override employee or student return status, regardless of the status calculated by Return-to-Workplace Advisor.

- **By API:** If your deployment uses the Override API, overriding is automated.
- **By file:** You can submit an override file with the updated status.

**Note:** For overriding, you either use the API or submit an override file. However, using both methods is not recommended.

## Examples of overriding status

**Example 1: A Not Approved override**

Use this override to set the Work Pass status to Not Approved for the specified time period.

1. An employee has reported symptoms or exposure, but didn't use the Employee Support Application to self-report this.
2. The employer has decided not to allow the employee to return to work.
3. The administrator prepares the override file IBM with the employee ID, the status **Not Approved**, and the status effective (start) and end dates.

The Work Pass status is overridden to **Not Approved** status for the specified time period. If the employee tries to check in but not report the symptoms or exposure, the resulting Work Pass indicates a **Not Approved** status. In addition, the Work Pass displays a message indicating that the employer has determined that the employee should not return at this time.

**Example 2: A Reset override**

Use this override to reset the Work Pass status to “neutral,” that is neither Approved nor Not Approved.

1. An employee currently has what is effectively a Not Approved override status. Based on an earlier check-in, the employee has an existing Work Pass with a Not Approved status.
2. The administrator prepares the override file with the employee ID, the status **Approved**, and the **same** status effective (start) and end dates.

The Work Pass status is reset to neutral. To obtain a pass with an **Approved** status, the employee must complete a full , standard check-in.

**Example 3: An Approved, special case override**

Use this override to reset the Work Pass status to Approved, even if the employee self-reports symptoms or exposure.

**Note:** Use this with caution since this is a special case.

1. An employee has reported symptoms or exposure at check-in using the Employee Support Application.
2. The administrator prepares the override file with the employee ID, the status **Approved**, and the effective (start) and end dates.
3. The employee checks in using the Employee Support Application and reports no symptoms or exposure.

The Work Pass status is overridden to **Approved** status for the specified time period.

# Preparing and submitting the override file

To override statuses, you submit an override file that contains only employee or student records.

**Table 29 Preparation notes**

| **Dates and time** | **Multiple records, other guidance** |
|---|---|
| • To set midnight, use this format:<br>*YYYY-MM-DD 00:00:00*<br>12pm is noon.<br>• Always specify an end date. Otherwise, the override does not take effect.<br>• If you only specify *YYYY-MM-DD*, then 00:00:00 is used for the time. | • If you submit multiple override records for a single employee or student, the most-recently submitted record sent is used.<br>• If you submit an override file that includes multiple override records for a single employee or student, the last record in the file for that employee or student is used.<br>• There is no “approved override” that would force a Work Pass or Campus Pass to an approved (**green**) status. |

**To prepare and submit the override file:**

1. Prepare the file. Refer to Preparing and submitting the override file.

2. Include only users that have been submitted in a User Directory file.
3. Follow the steps in Submitting files to submit the file to IBM.

**Note:** All override records are retained for historic analysis.

**Table 30 Format for the Override file**

| # | Field name | Data type | Maximum length | Required | Notes |
|---|---|---|---|---|---|
| 1 | Filler | Character | 100 | | |
| 2 | Filler | Character | 100 | | |
| 3 | Filler | Character | 100 | | |
| 4 | User Identifier | Character | 100 | Required | This is the ID the customer website will pass to AppID during single sign-on. The User Identifier during single sign-on cannot be the user's Social Security number. |
| 5 | Override status | Character | 20 | Required | Approved or Not Approved |
| 6 | Override status effective date | Date | 20 | Required | MM/DD/YYYY format<br>Timestamp optional - hh24:mm:ss |
| 7 | Override status end date | Date | 20 | Required | MM/DD/YYYY format (optional)<br>Timestamp optional - hh24:mm:ss |
| 8 | Filler | Character | 100 | | Reserved for future use |
| 9 | Filler | Character | 100 | | Reserved for future use |
| 10 | Filler | Character | 100 | | Reserved for future use |
| 11 | Filler | Character | 100 | | Reserved for future use |

# Troubleshooting

You can resolve many issues with IBM Return-to-Workplace Advisor by trying troubleshooting procedures.

**Tip:** Refer to the topics in this section before you contact IBM. For support information, see If you have questions.

## Check-In Submission Not Required message

### Symptoms

Employees or students see a **Check-In Submission Not Required message** in the support application.

### Resolving the problem

The workplace directory information that your organization provided has a missing or invalid value. Submit updated directory information. For more information, see Site Directory.

## A pass displays an incorrect return status

### Symptoms

A Work Pass or Campus Pass shows an inaccurate return status.

### Resolving the problem

You can update the employee or student return status. For steps, see Overriding return status.

## Administrative error message at login

### Symptoms

When employees or students try to log in to the support application, the web browser displays the message:

> **An administrative error has occurred, preventing you from logging in to the application.**

### Resolving the problem

There is a configuration issue with single sign-on authentication. Typically, this only appears during implementation, when authentication setup has not been completed.

# Cannot log in to support application using iPhone, pop-up window message

### Symptoms

Employees or students cannot log in to the support application using an Apple iPhone. The device displays a message to enable pop-up windows.

### Resolving the problem

This can occur with devices that do not have the most recent operating system version. The employee or student should try updating the operating system, then try logging in again. For information about browser and device support, see Supported web browsers and mobile devices.

# Revision history

**Table 31 Document updates**

| Date | Revision | Authors |
|---|---|---|
| August 2020 | Created | IBM Watson Health Technical Publications and the IBM Return-to-Workplace Advisor team |

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