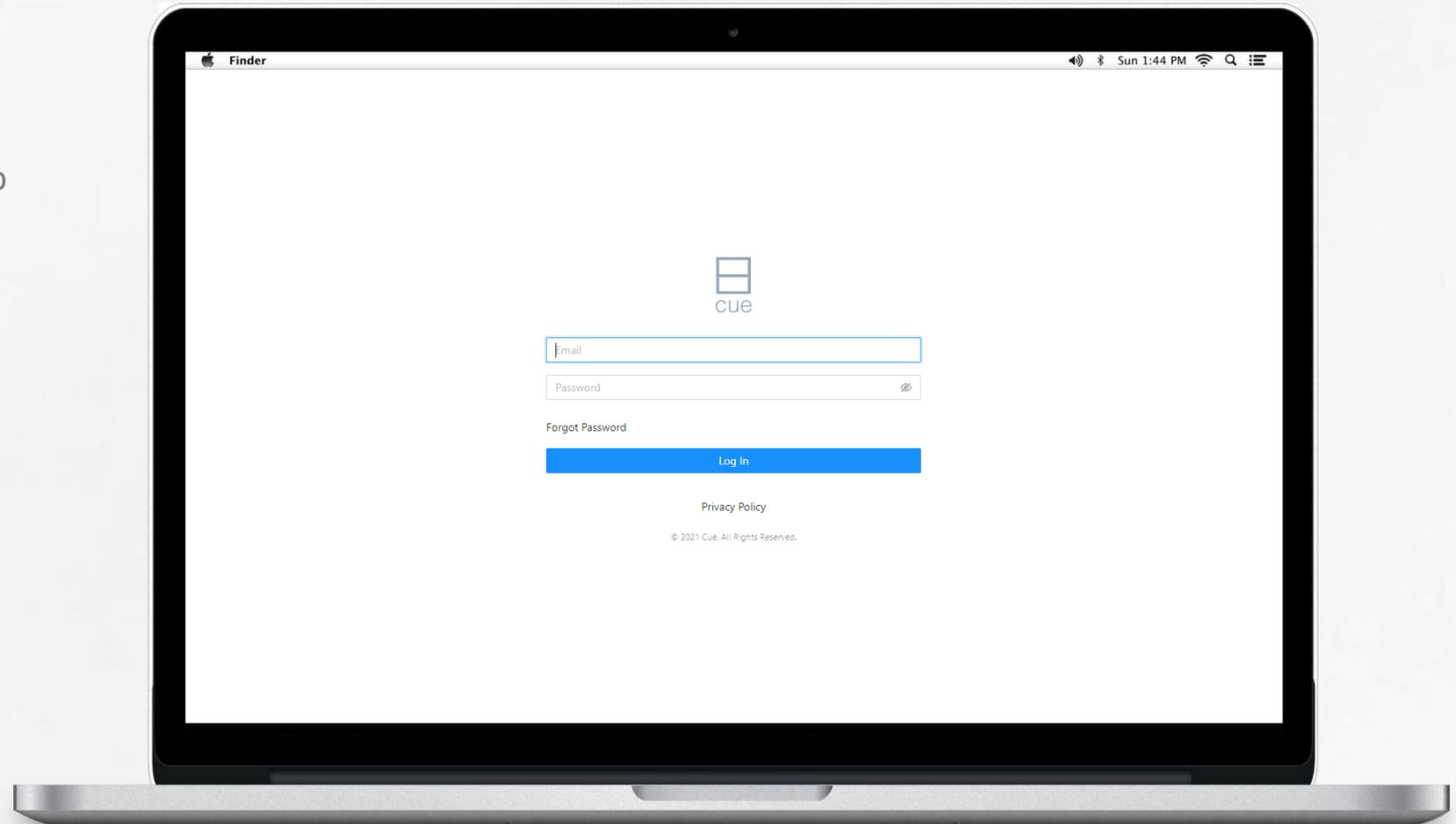# Cue Dashboard
Onboarding Employees to your Dashboard

This guide will walk you through how to onboard participants to the Cue Health Dashboard for ease of monitoring, reporting, and compliance in your organization.

cue

Email

Password

Forgot Password

Log In

Privacy Policy

EMAIL INVITATION

Before onboarding your employees, you must first accept your role as an Administrator, this invite will automatically be sent out to you at the time of Dashboard creation
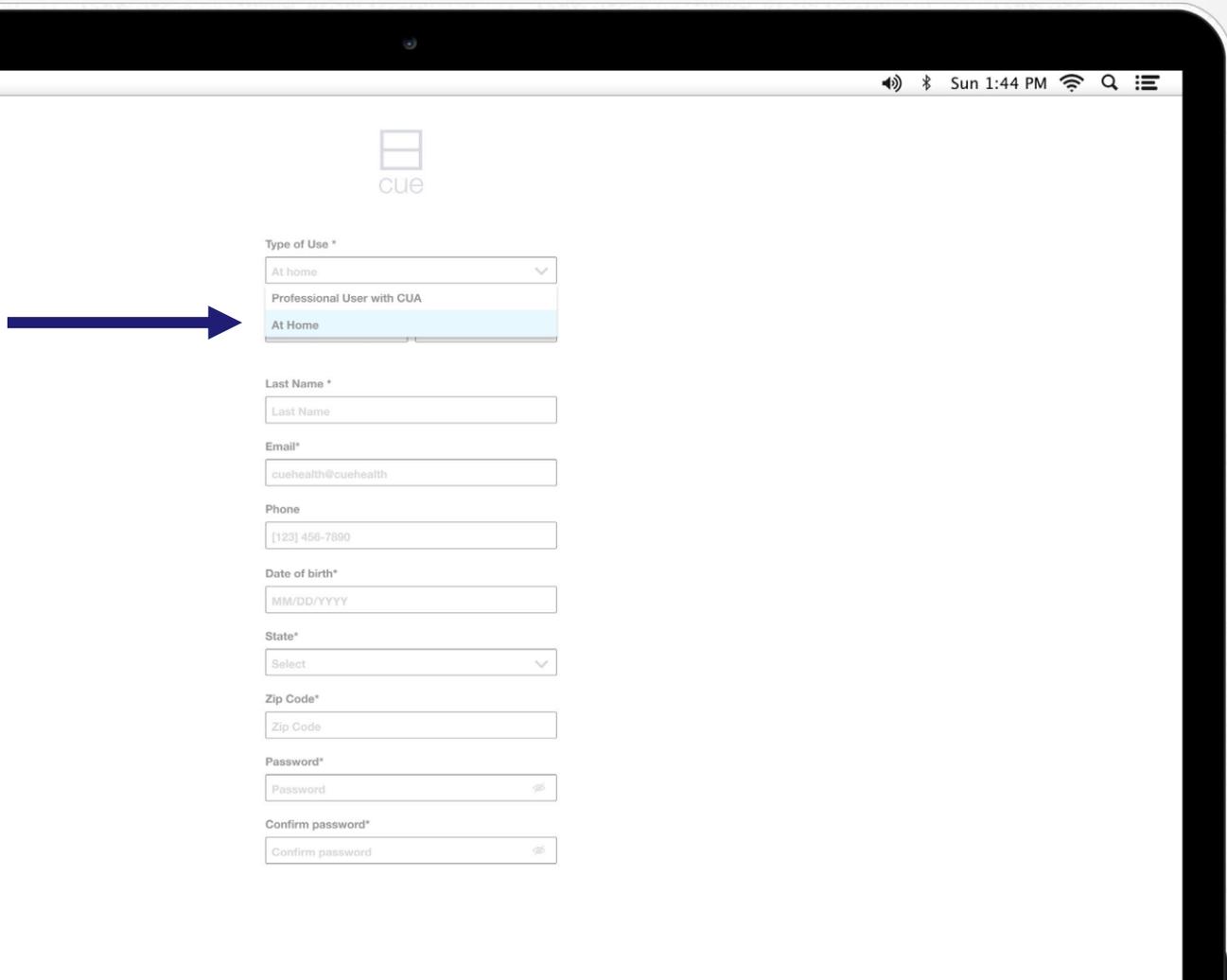**Be sure to accept this email invitation on a desktop or laptop computer, as it is not optimized for mobile**
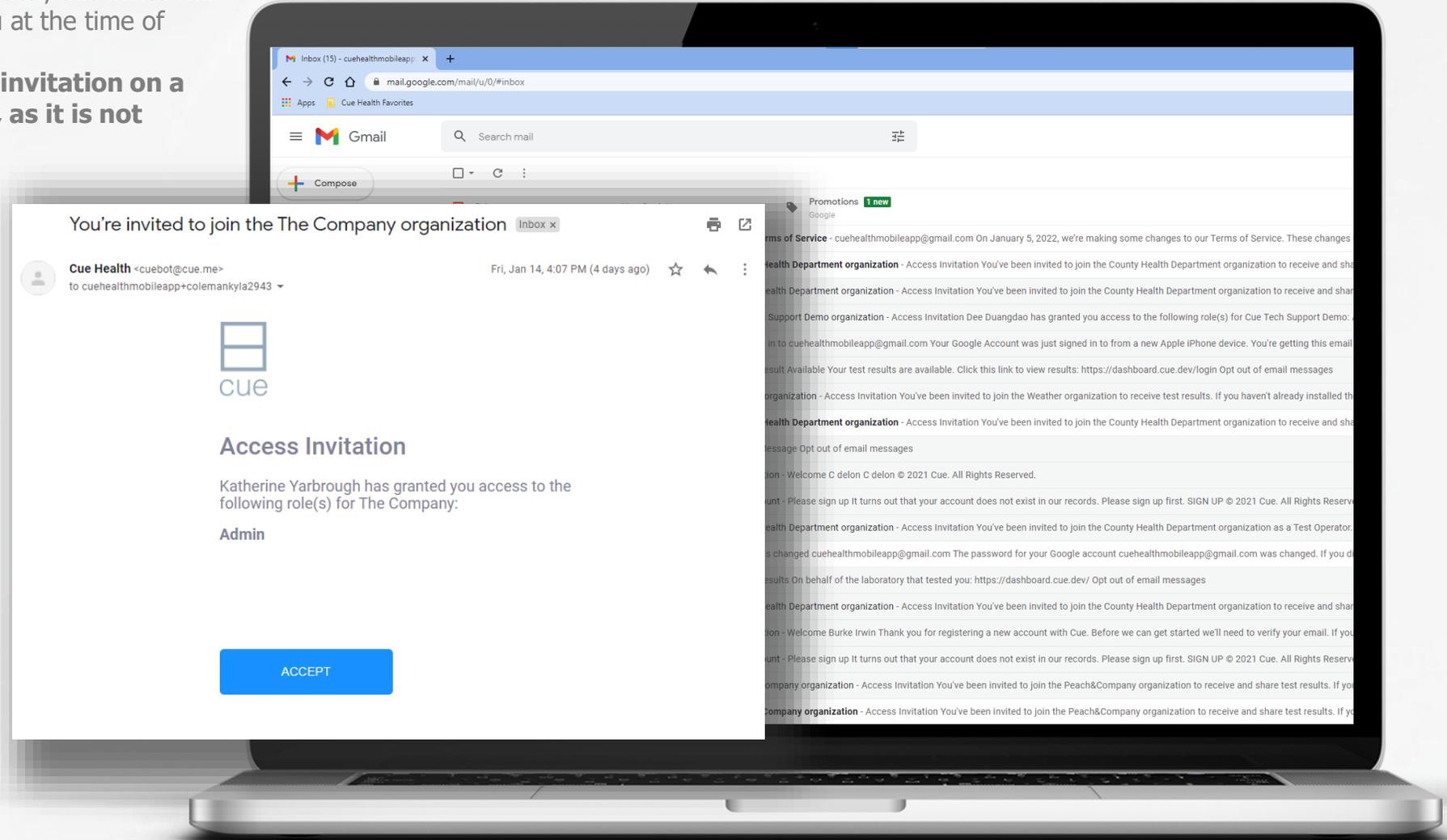
CREATE AN ACCOUNT

If you have not created an account with the invited email address, you will be asked to create one on the web browser.
Be sure to select <u>At Home</u> for Type of Use if your organization does not have a CLIA or waiver
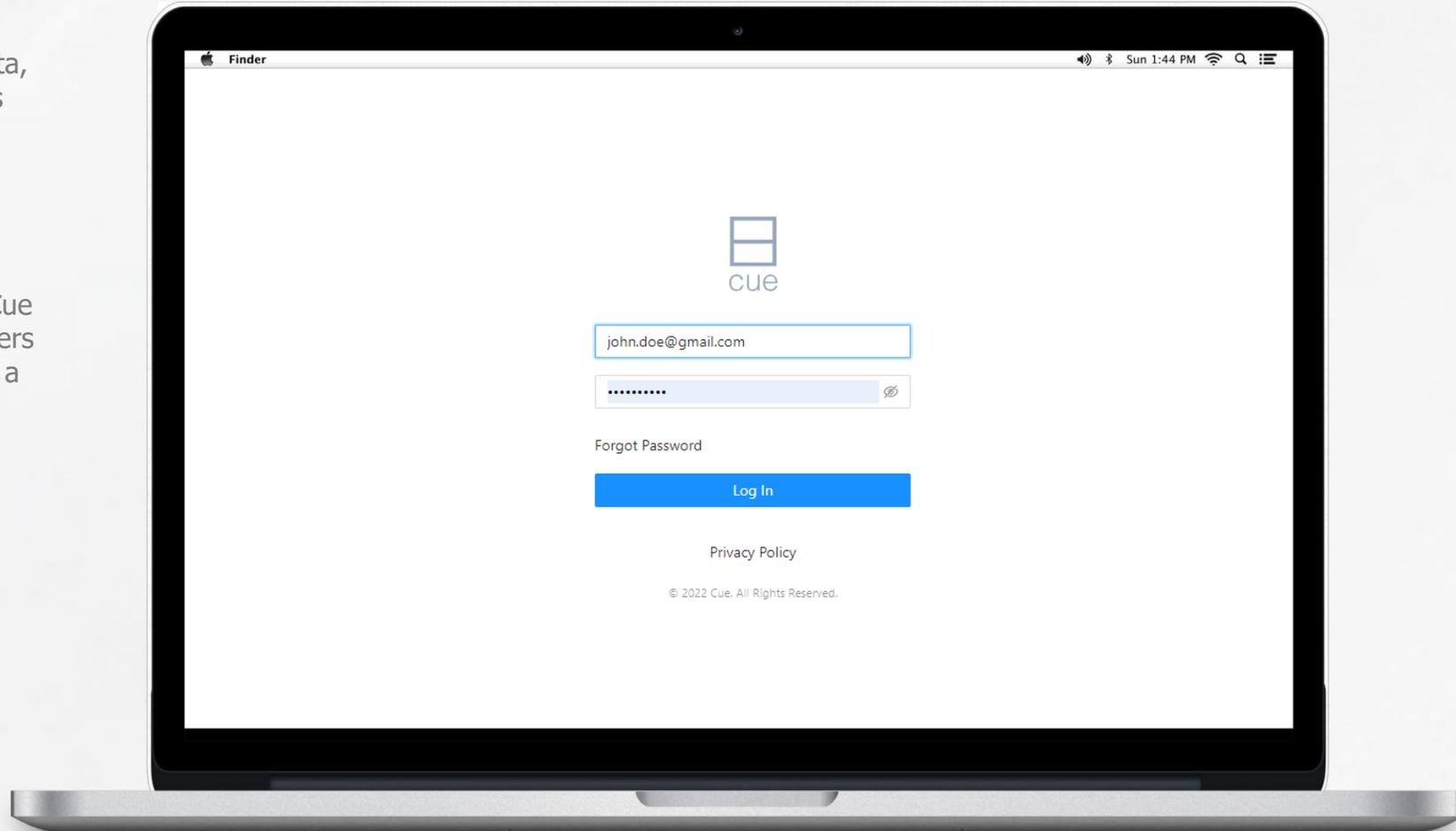
IMPORTING MEMBERS

Before you may begin receiving participant test data, they must first be imported into your dashboard as Members.

Members, or, people to be tested within your organization, must have an email associated with their Member profile to receive invitations to the Dashboard, and for their testing to flow from the Cue Health Mobile App. Email is not required for Members that do not want a copy of their test performed by a Test Operator.

Other Required Fields for Reporting are:
- First and Last name
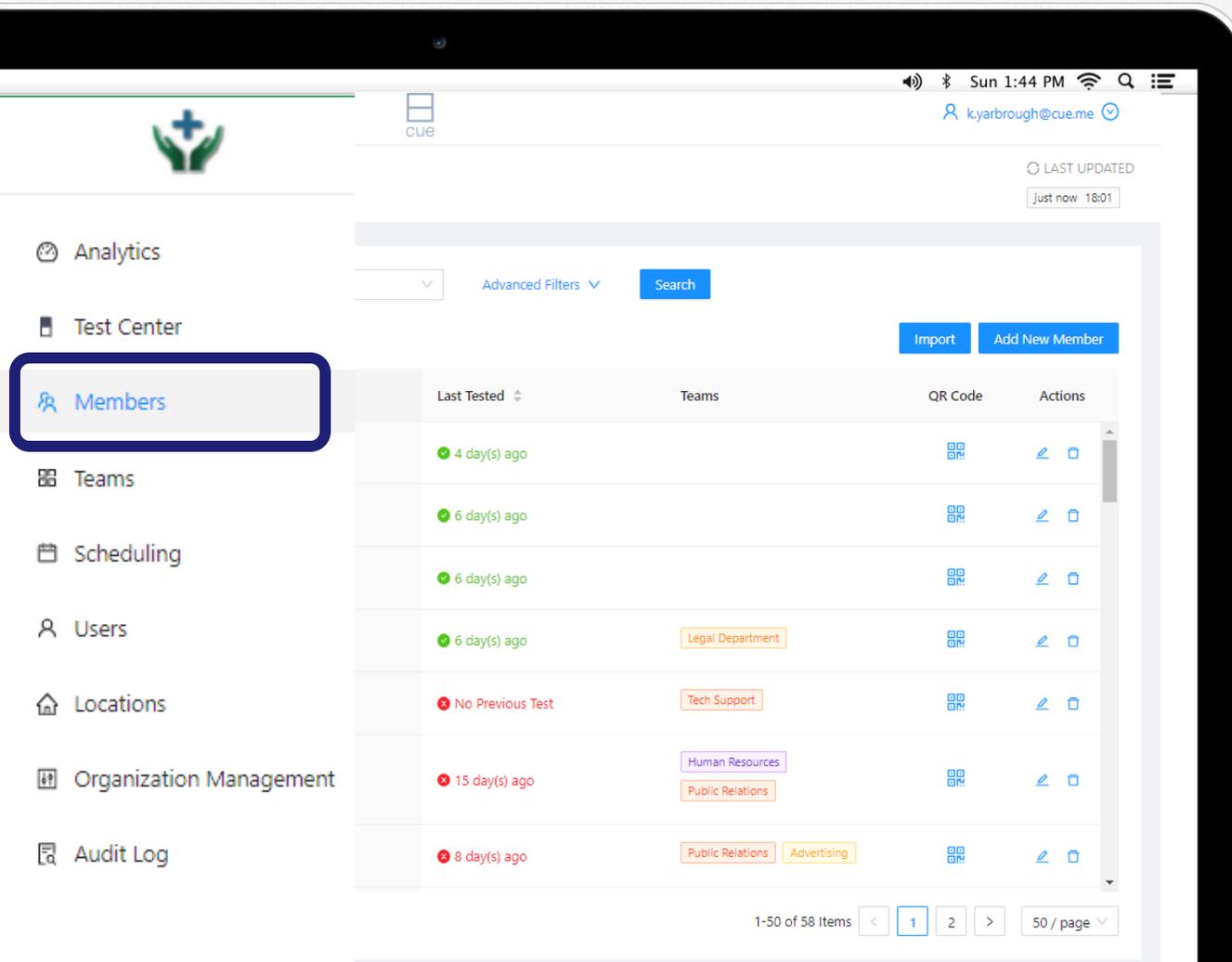- Date of Birth
- State of Residence and Zip code

To import members, log into the Cue Health Dashboard Using the Credentials you just made to begin.

IMPORTING MEMBERS

Navigate to the Members Tab Via the "Members" button on the left-hand menu
There are two ways to add members to the Cue Health Dashboard
1. Add Member Button
2. Import Spreadsheet

IMPORT USING ADD MEMBER BUTTON: ADMINISTRATOR WORKFLOW
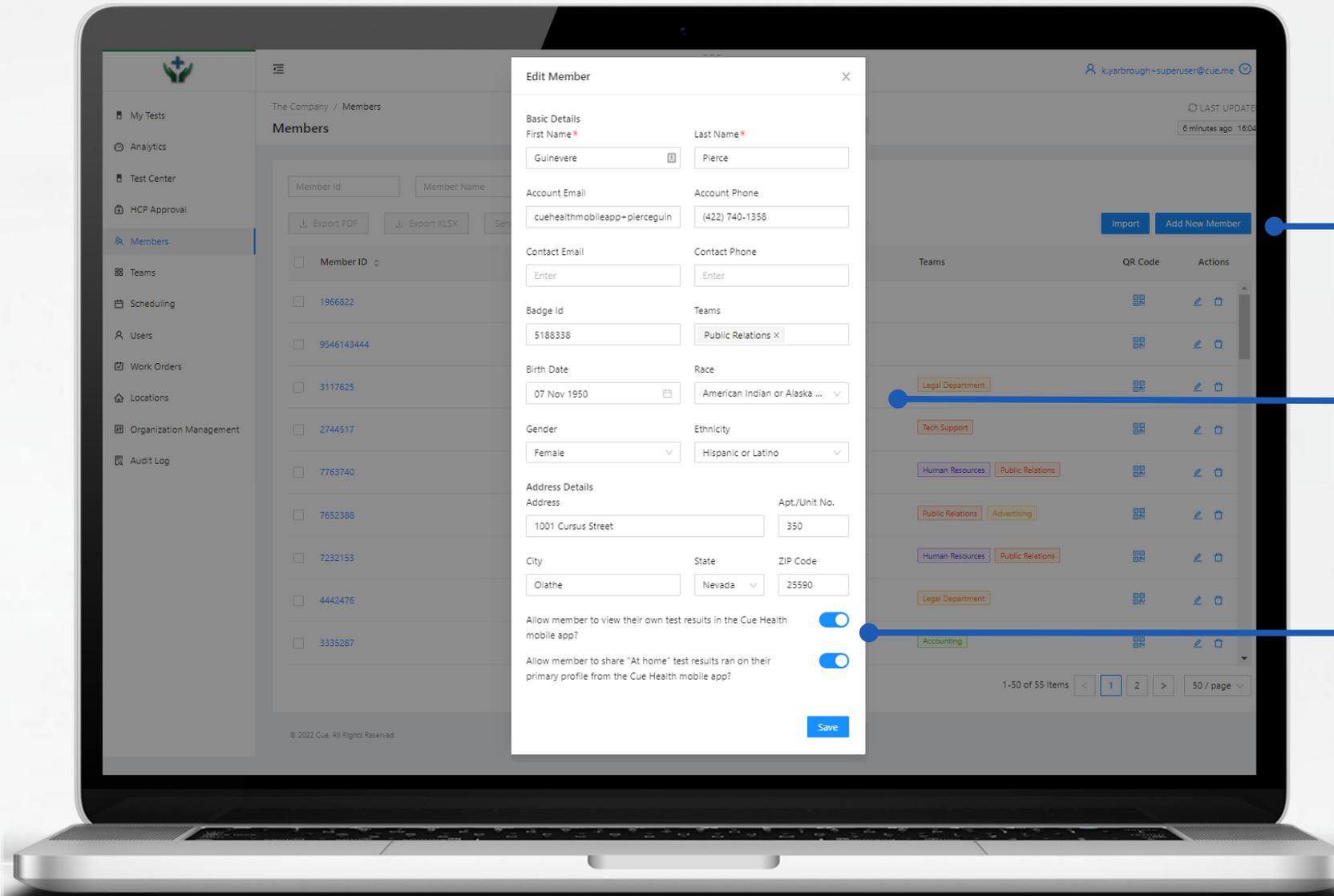
Add New member

Enter Demographic Information, first and last name, date of birth, state of residence and zip are required for reporting, email is required to invite to the Dashboard

These two toggles determine how results flow; the top is if the member is being tested by others, this should be enabled in Test Operator Workflows. This toggle gives the My Tests Mobile Restricted Role. The bottom is for At-Home workflows and should be enabled if the employee tests on their own App/login credentials. This Toggle gives the Share Results Mobile Restricted Role. Both should be enabled for Hybrid workflows.

# BULK MEMBER ADDITION WITH IMPORT BUTTON: ADMINISTRATOR WORKFLOW

Download the Template

Fill Demographic information as before

The import spreadsheet is smart, if you make changes to the sheet and re-upload, it will confirm how many Members (rows) were changed if the Member ID field is populated and does not change.

IMPORTING MEMBERS: NUANCES

Email is how the Dashboard connects to the Mobile App and Member ID is how the Dashboard keeps track of Members
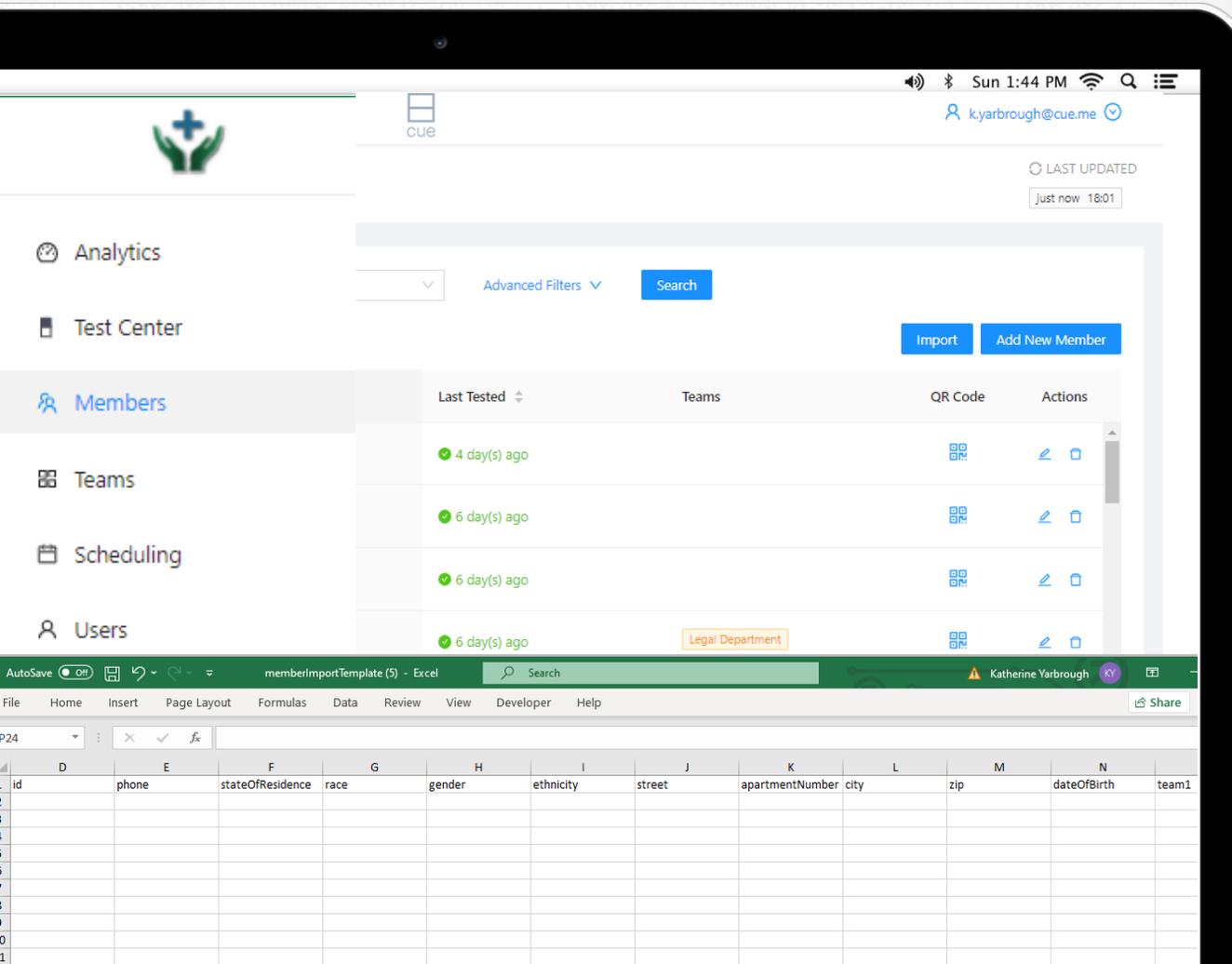
The Member ID can be an employee ID, Phone number or any other unique identifying number, if you do not provide one, the Dashboard autogenerates a unique Member ID for each person to be tested

Account Email, Account Phone, and Member ID **must be unique** between Members. To re-import using autogenerated Member ID's first, export the members list to xls, make changes to the export, remove "last tested" column, then re-import keeping Member ID the same.

Notify your Field Application Scientist or Account Representative if you would like to enable auto invitations for either or both toggle roles: My Tests or Share Results. If this is enabled, all Members added through the Import sheet will be invited to the specified roles.
Note: Employees must allow notifications from the Cue Health Mobile App to receive Push results to their account performed by a Test Operator

Teams used in the Import Sheet will be generated if they do not exist, be careful of typos. Teams cannot be edited, only deleted, if an error is made, use the import sheet to correct members team association and re-import.

Email invitations for Member roles (My Tests, Share Results) are sent at the time of Member creation.

IMPORTING MEMBERS: RECAP

Required Fields for Federal Reporting are:
- First and Last name
- Date of Birth
- State of Residence and Zip code

Email is required for addition to the Dashboard

The Import sheet is smart and will notify of changes if Member ID remains unedited.

Toggle 1 enables the My Tests Role and is to send results to a member's Cue Health Mobile App if they were tested by someone else.
Toggle 2 enables the Share Results Role and is to send results to the Dashboard if the member self tests with their own credentials.

Both toggles should be enabled for a Hybrid Workflow, speak to your Cue Representative about auto-enabling the toggles for the Member Import Sheet

Member ID is how the Cue Health Dashboard keeps track of Members, if you do not provide one, the Dashboard autogenerates a unique Member ID for each person to be tested

Fields that must be unique
- Member ID
- Email
- Phone Number
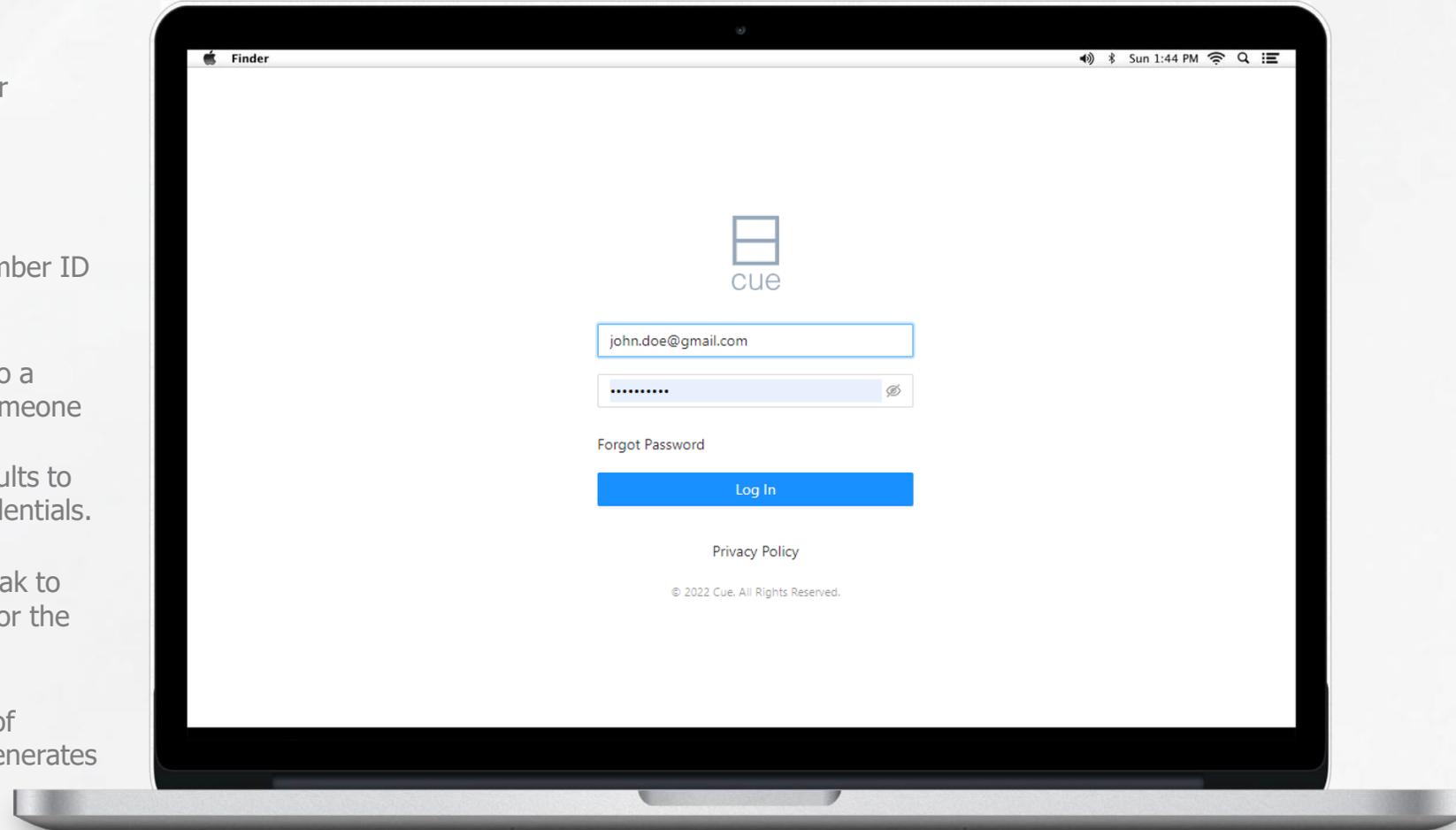
INVITING USERS

In addition to adding members to your Dashboard, you will likely require Users to help manage and support your testing operation for your organization. Users are people that either perform or otherwise support testing for your organization and are distinct from Members, who are people to be tested in your organization. There are several User roles and are also invited via email like the My Tests and Share Results roles.

All that is needed to invite a User to your Dashboard is an email address and a role assignment

If you ever need help, hover over the "i" for more information about a User Role's permissions
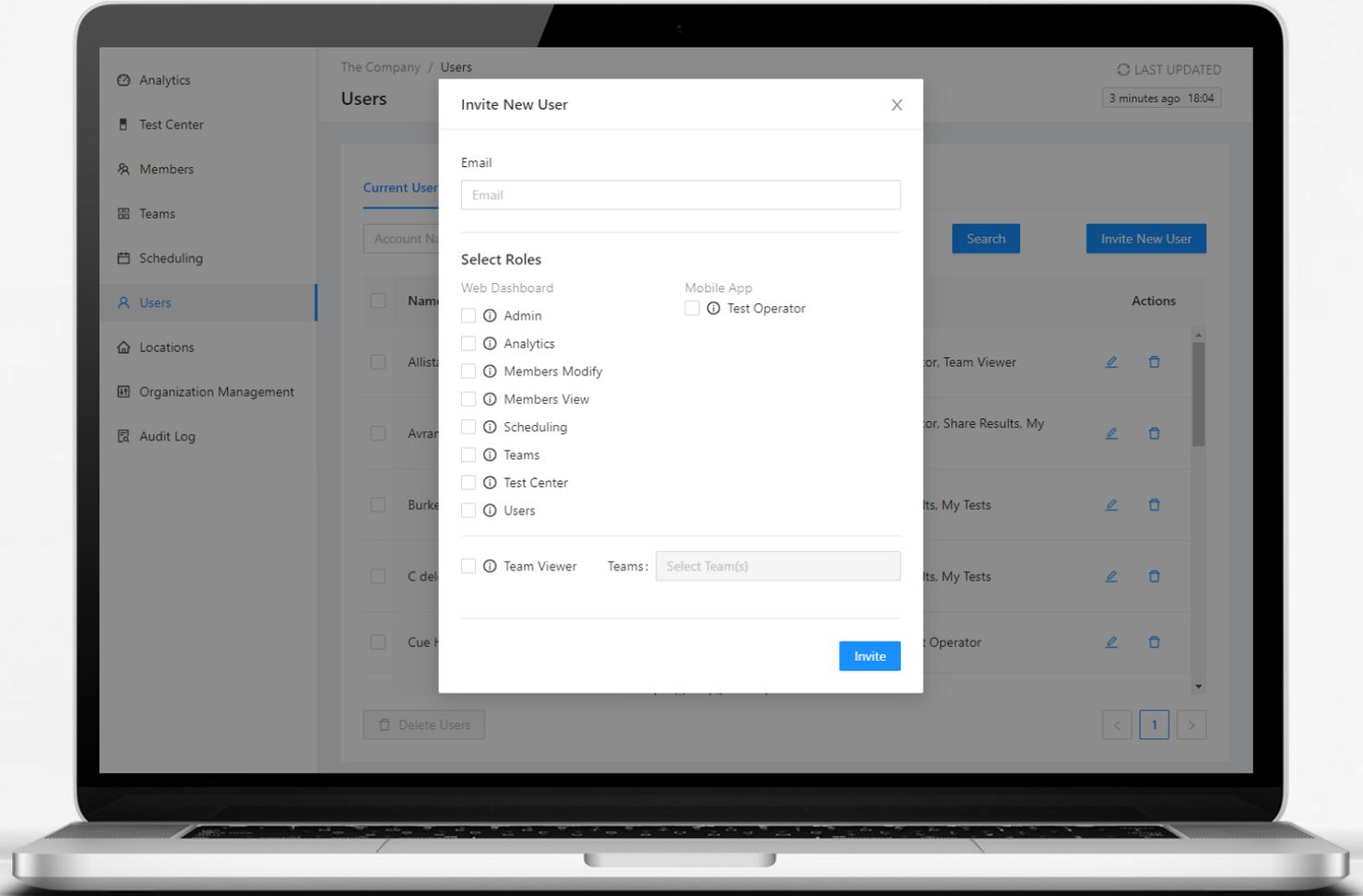
USER ROLE DESCRIPTIONS

The Dashboard is **a role-based web application;** besides accountless participants, all members and users have a role. All participants (besides accountless) are invited to a role either to the Dashboard, or restricted to the Mobile App, but still tied to your organization's Dashboard for data flow.

Admin - Has access to view and manage all other roles

Analytics - Enables users to view deidentified visuals and graphs on your organization's testing trends

Members - Allows user to import members and view current member PHI and testing information

Scheduling - Enables users to manage scheduled testing events

Teams - Teams role enables users to create and manage Teams

Test Center - Enables users to view Test Center results data

User - Role enables users to invite new users, modify existing user's roles, and delete users.

Test Operator - Mobile Restricted, no access to Dashboard. This role enables the user to perform test on members in your Dashboard on the Mobile App, they can view the entire member's list on the Mobile App unless otherwise restricted with Team Viewer. They can only view the testing history for tests they have performed with their Test Operator Cue Health Account Login.

My Tests - Mobile Restricted, no access to the Dashboard. This role enables participants to view their test results performed on them by a Test Operator within their own Cue Health Mobile App. Role requires Member is added to the Dashboard with an email, they accept the role, and create an account prior to testing for the results to flow to their Mobile App. Toggle 1 in the Add Member Screen pictured to the right

Share Results -Mobile Restricted, no access to the Dashboard. This role enables participants to share their self-performed test results with your organization's Dashboard. Role requires Member is added to the Dashboard with an email, they accept the role, and create an account prior to testing for results to flow to your Dashboard. Toggle 2 in the Add Member Screen pictured to the right.

OTHER ROLES

To enable an employee to perform, or assist in performing tests on others, they need to be invited to the organization as a Test Operator. Test Operators should receive training on proper handling of PHI before assisting others in performing tests for your Organization.
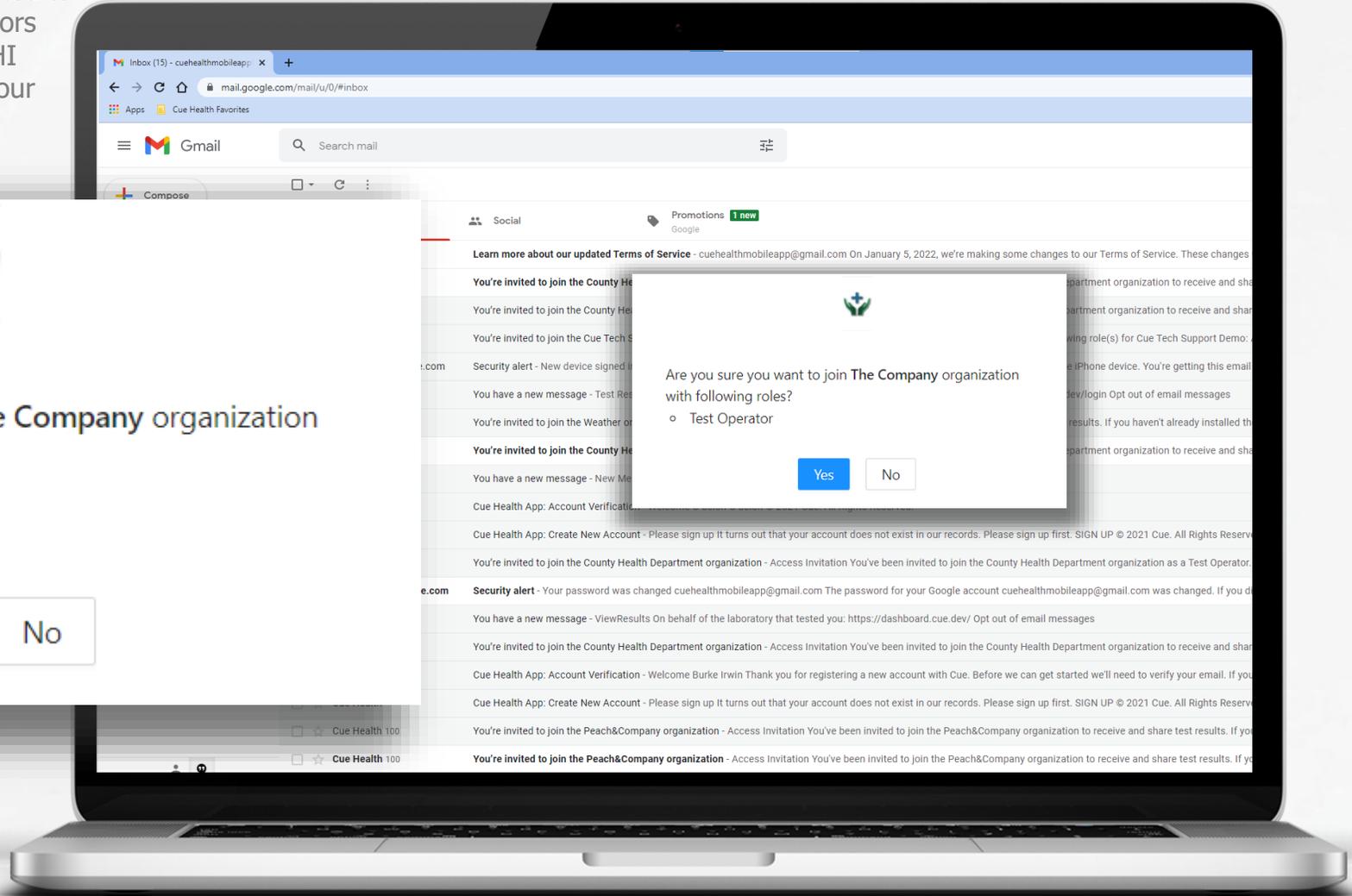
HOW TO RESTRICT ACCESS BY TEAM: TEST OPERATOR WITH TEAM VIEWER

Some organizations may wish to group their employees in the Dashboard by business unit into Teams and restrict their Test Operator permissions by those Teams they actively assist.

To restrict the Mobile Member's List, and Dashboard Test Center and Member's List, add a Test Operator with Team Viewer Restrictions like this:
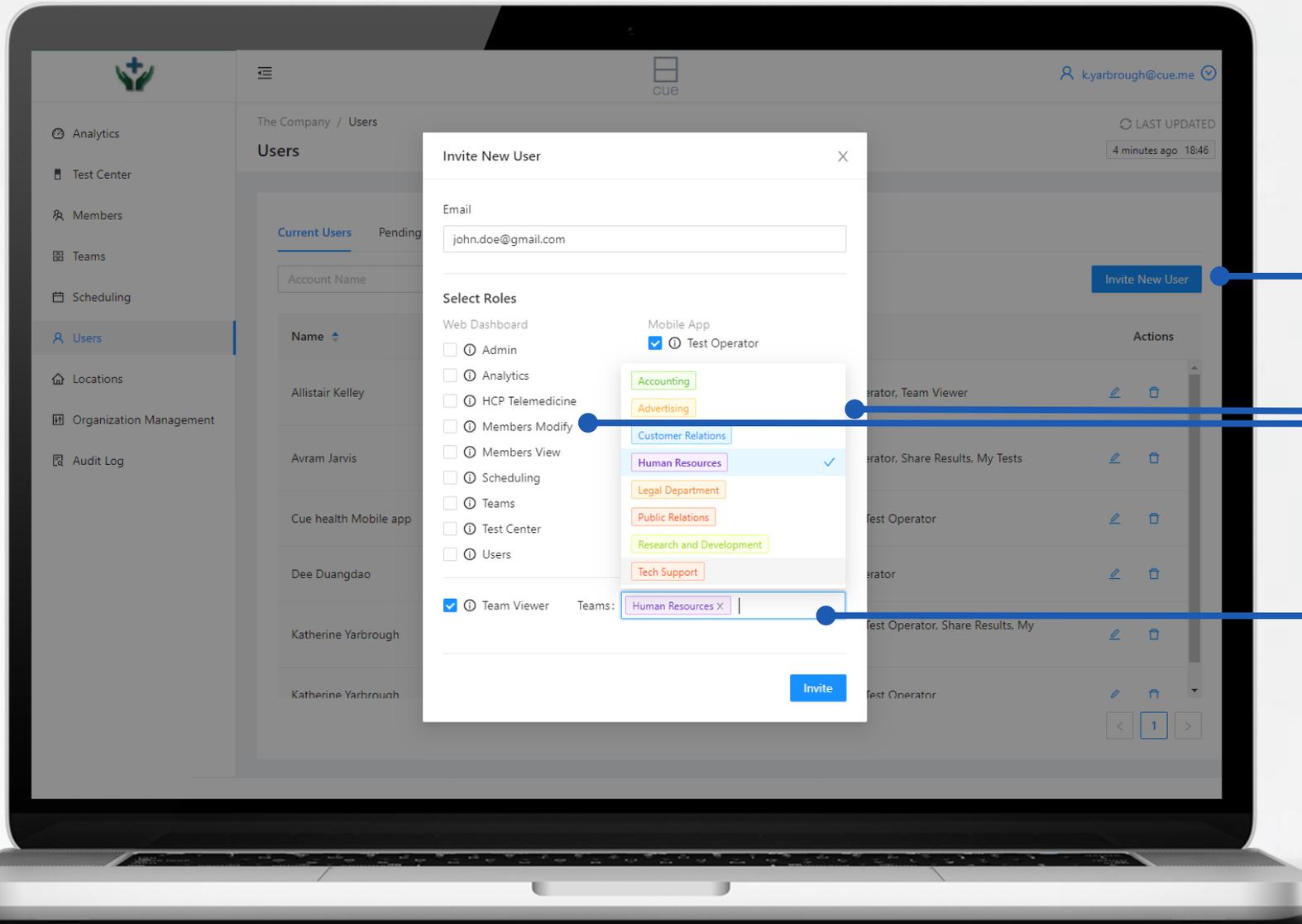
**1** Invite New User, only email is required

2 Enable Test Operator for those testing or assisting others in testing. Include Member Modify to enable them to Add Members to the Dashboard

3 Enable and specify Team Viewer to restrict Members list on the Mobile App, and Test Center and Member List on the Web Dashboard. If a Member is part of two teams but the Team Viewer Test Operator is listed for only one, the Test Operator will see this Member. Team Viewer natively gives access to the Dashboard and includes the Test Center and Member menu items.

MEMBER AND USER INVITATION EXPERIENCE

The invitation experience for all roles is the same and mirrors the acceptance process for your Admin role.

Users accept the email invitation, create an account, accept all roles, and log into both the Dashboard and Cue Health Mobile App utilizing the credentials they just created.
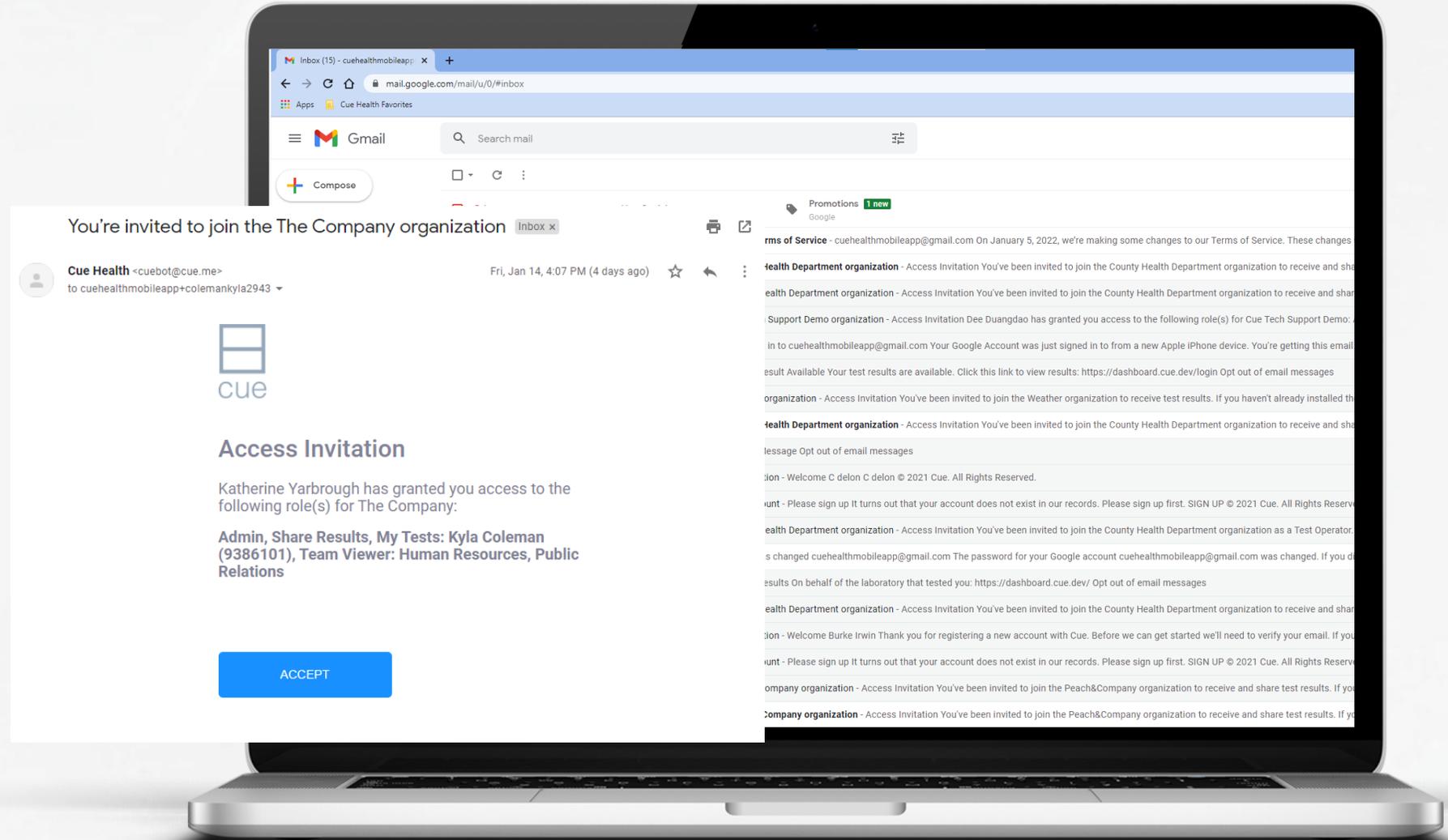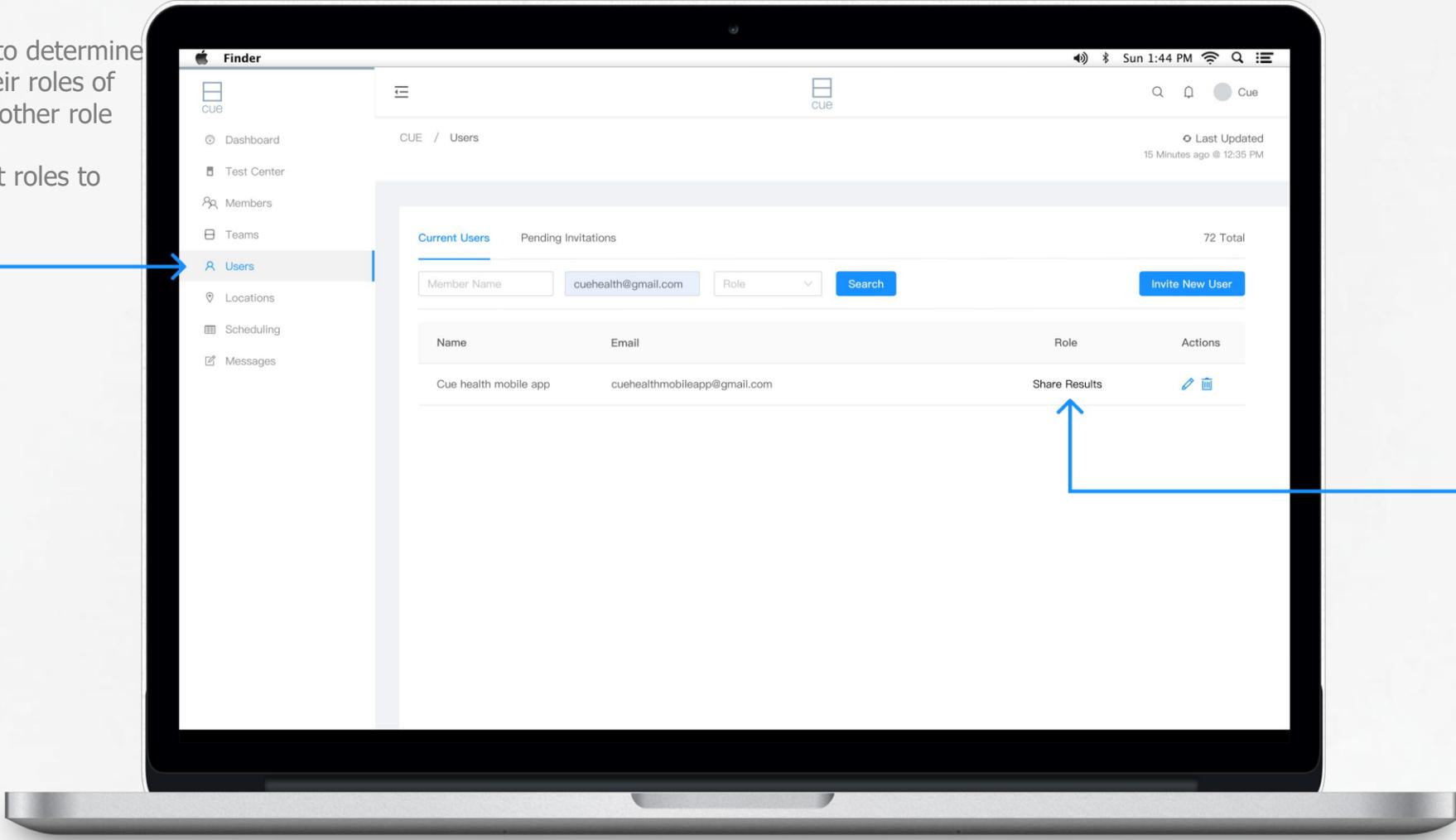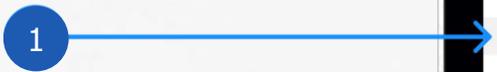
CONFIRM ACCEPTANCE

Once you have invited a User, check the status of their invitation by navigate to the Users Tab Via the "Users" button on the left-hand menu.

Search by Name, email, or role to determine if participants have accepted their roles of Share Results, My Tests, or any other role such as Test Operator.

Members and Users must accept roles to send or receive results.

CONFIRM ACCEPTANCE: CHECK PENDING

Navigate to the Users Tab Via the "Users" button on the left-hand menu

Check pending invitations to view who has not accepted roles, can search by email, and role. From this screen you can resend an invitation or delete it with the arrow and garbage can icons respectively.
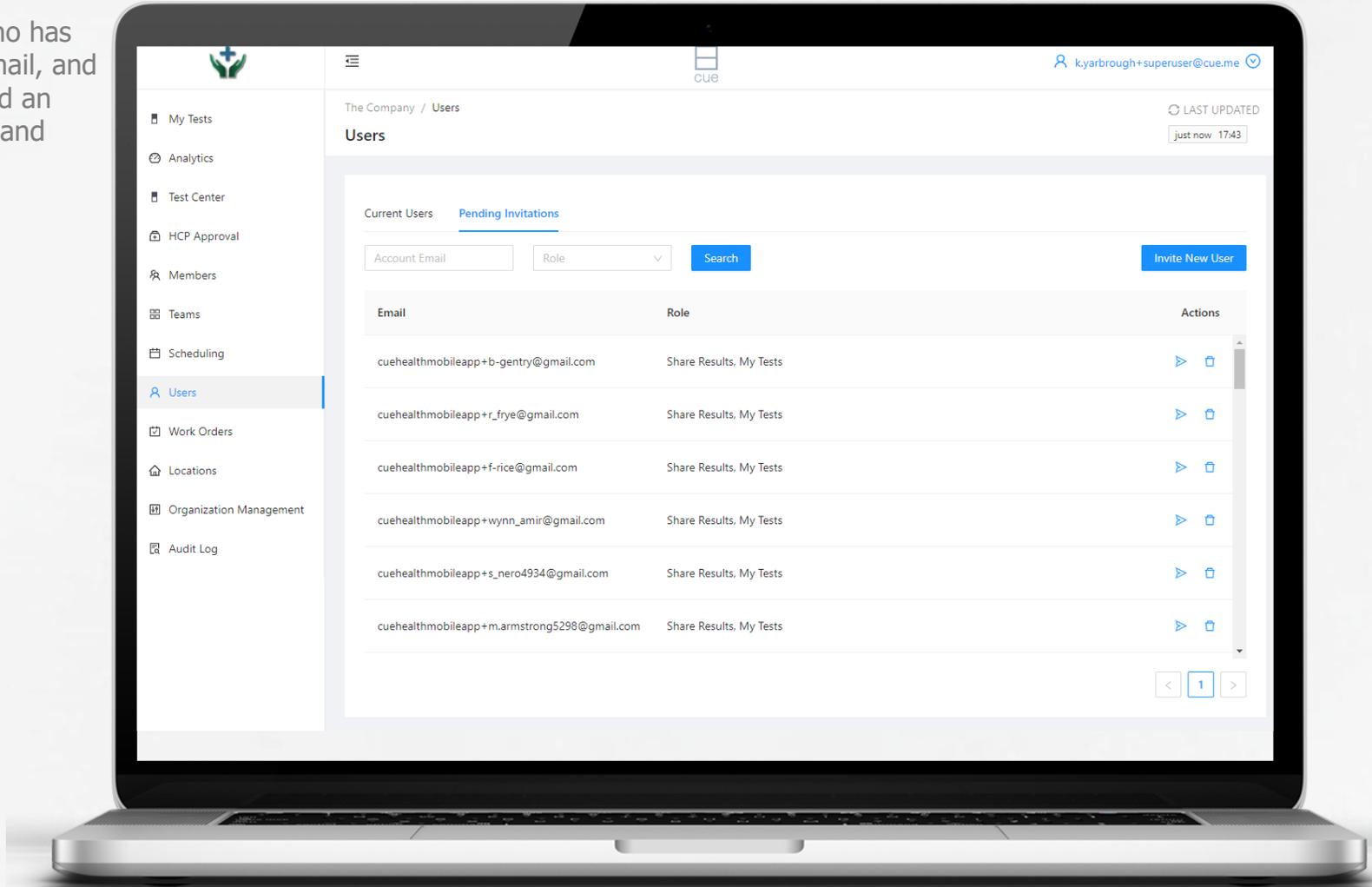
TEAMS

Teams are a cornerstone feature of the Cue Health Dashboard and can greatly simplify your testing deployment and monitoring strategies. Teams are a way of categorizing and grouping participants into business sectors, schools, sites, or other useful subdivisions. Teams can be essential for contact tracing, organizing your test center, and restricting access to the PHI in the Dashboard to only the relevant people within your organization.

To use the Teams feature, simply type a Team name into the Teams field on the Import Sheet for a specific member, or into the Teams box on the Add New Member window.

You can be as creative as you like when naming and assigning teams, some examples are HumanResources-Headquarters, HumanResources, Headquarters, or SchoolA-Students, ClinicA, Staff, ClinicA-Staff. Combining multiple attributes into one Team name may assist you in further refining your organization's groupings of Members.
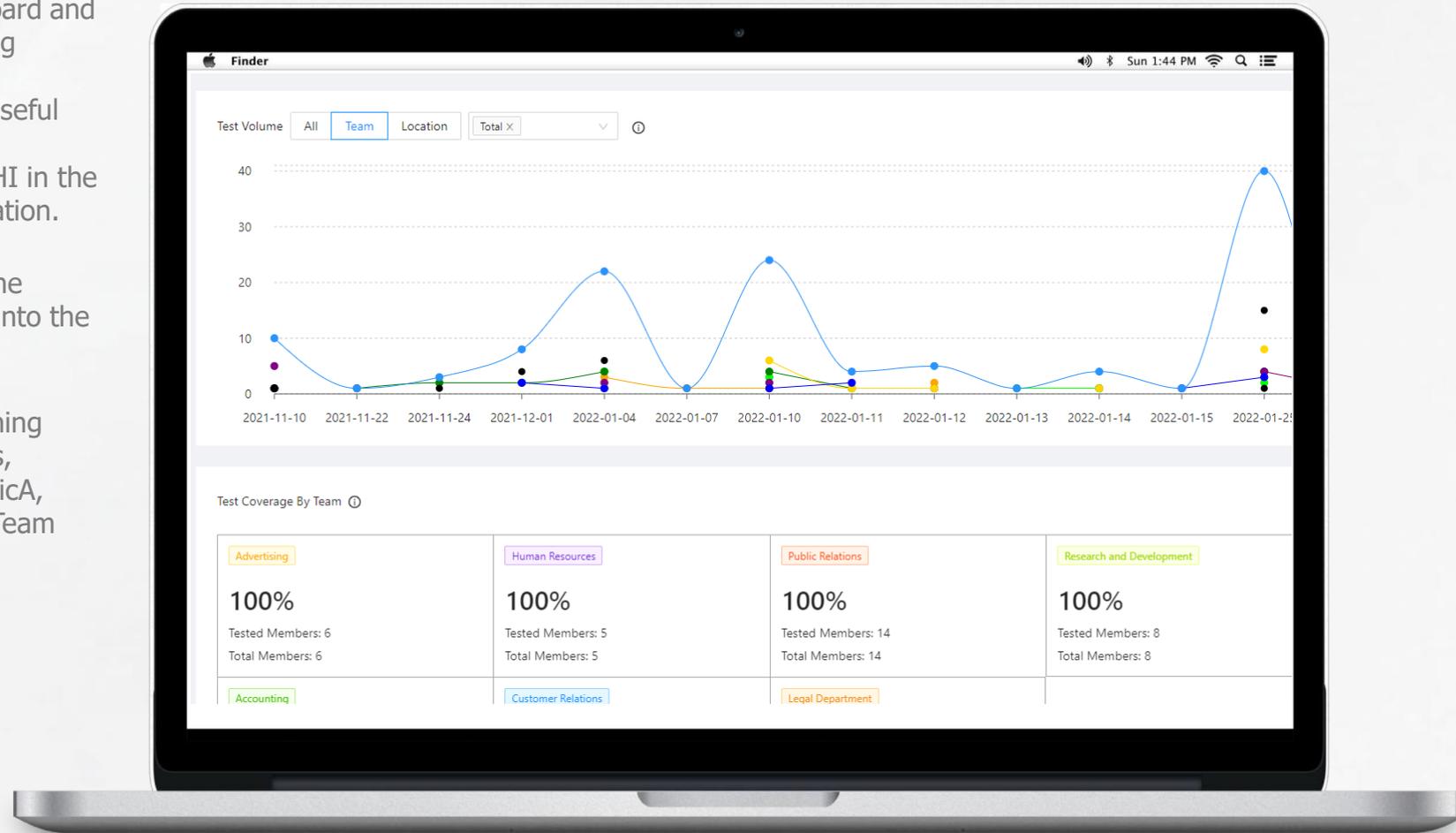
À La Carte Accountless Delivery: Admin Workflow

For those organizations that do not want to globally enable Accountless Delivery of Test Results to Members. You may do so on a test-by-test basis via the Messaging function in the Test Center.

To send Accountless Results manually, navigate to the test center and select a test, then select "Send Message" and ensure the bottom box is enabled. For the Accountless Results Link to be delivered the Member must have either an Account Phone or Account Email in their member Information.
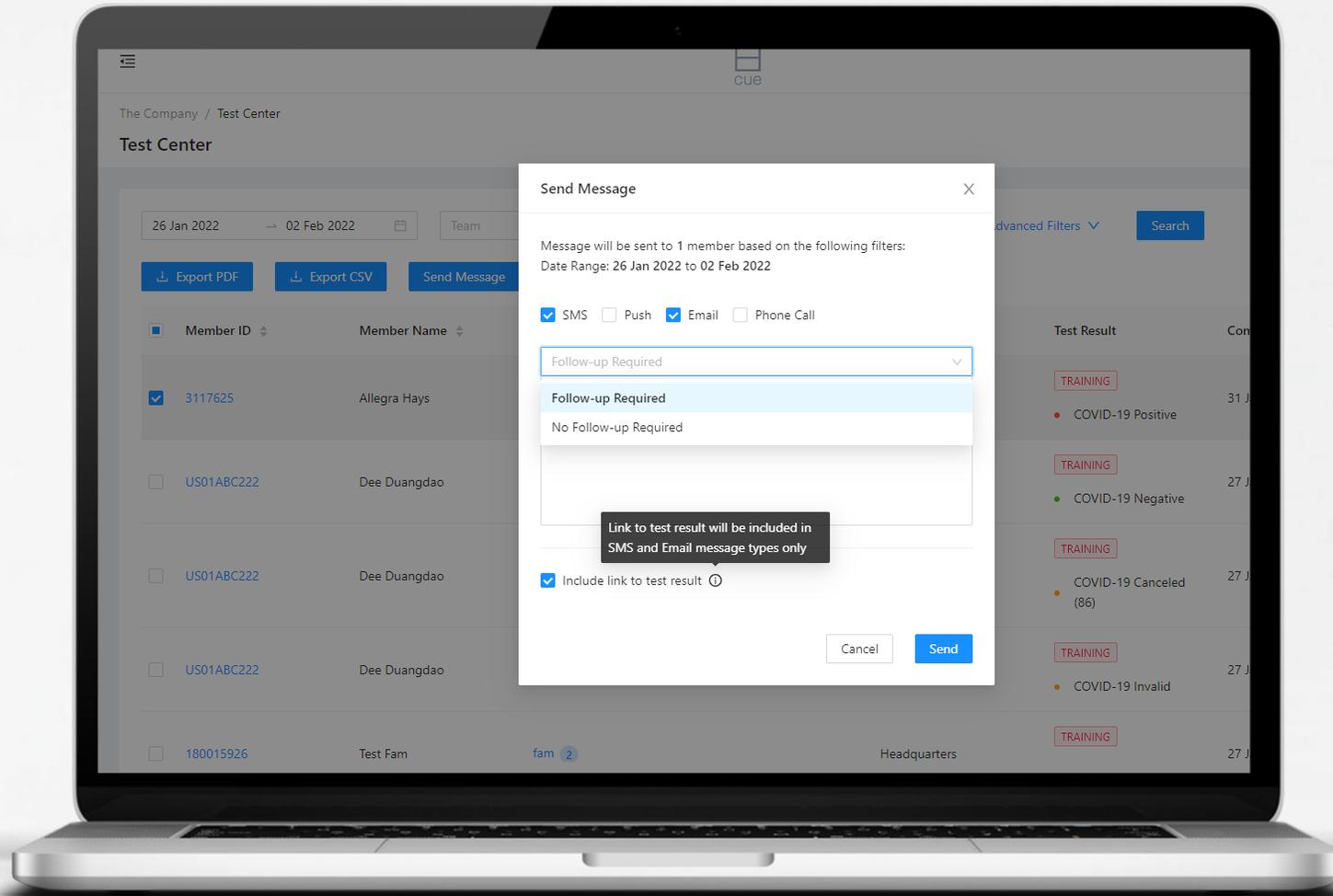
END USER EXPERIENCE: ACCOUNTLESS TEST DELIVERY
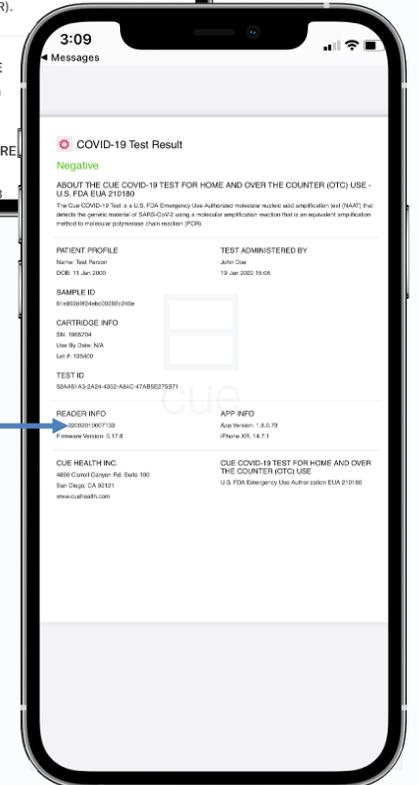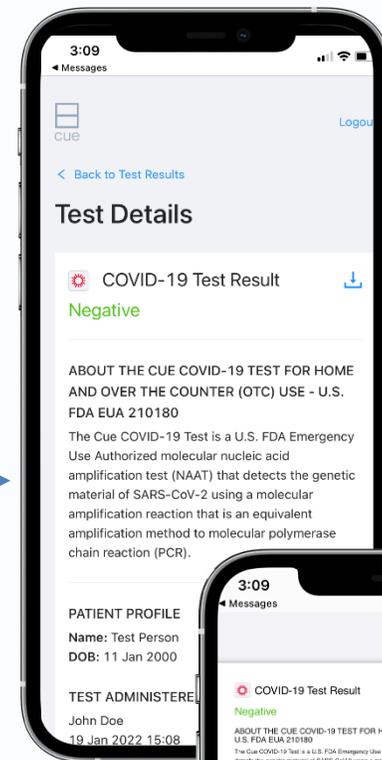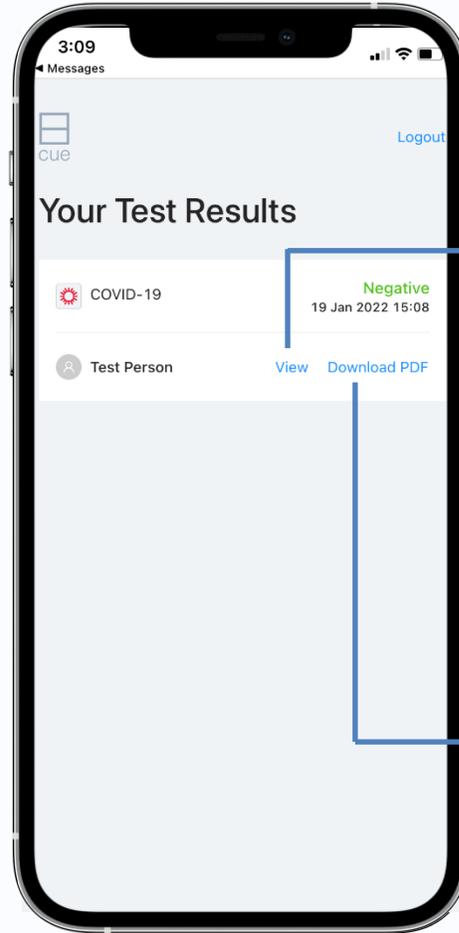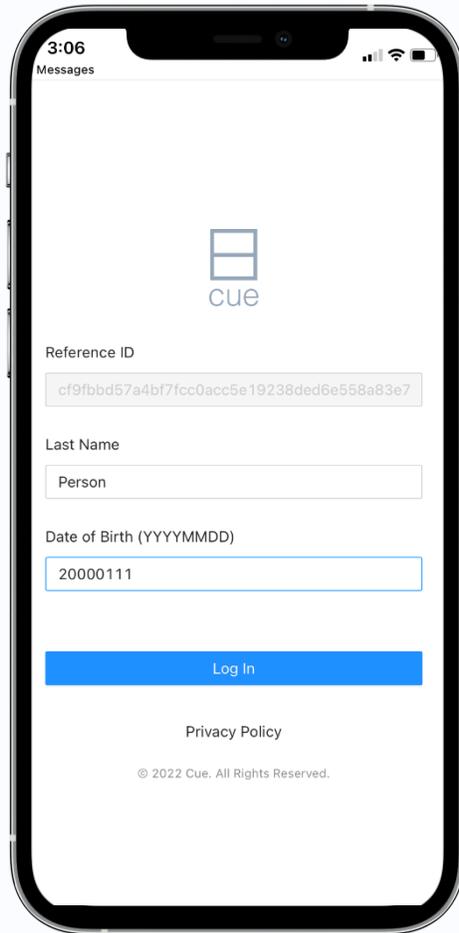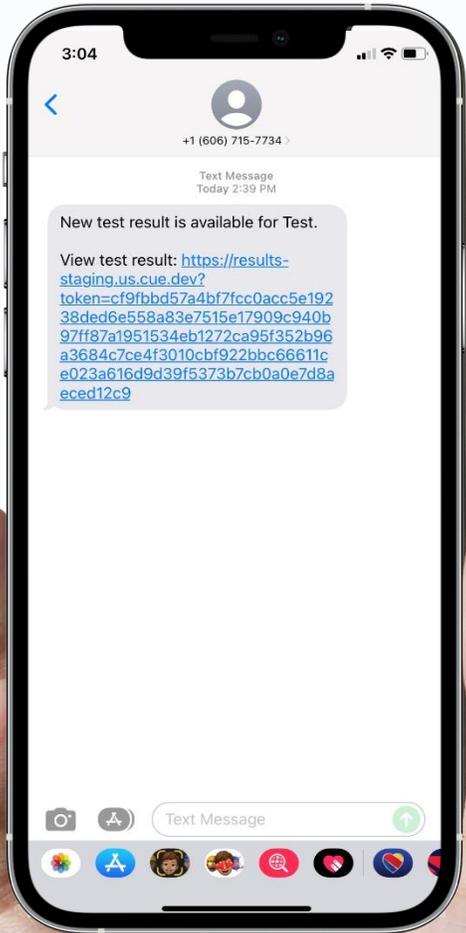
Congratulations

You have completed the one-time setup to capture testing data performed by your employees on the Cue Health Mobile App.