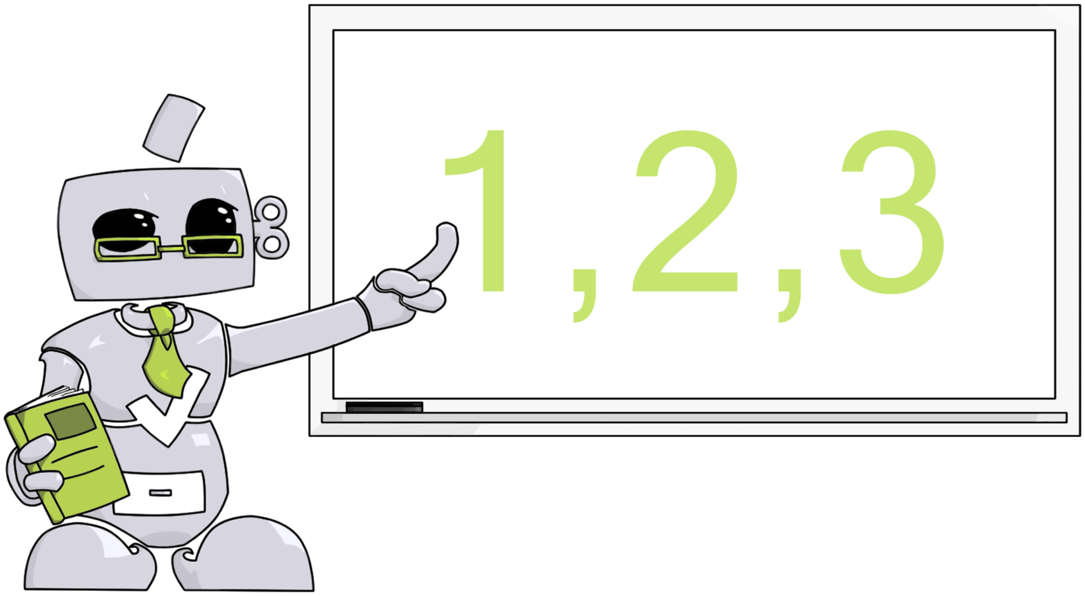
complio



Student User Guide

Email: complio@americandatabank.com

Table of Contents

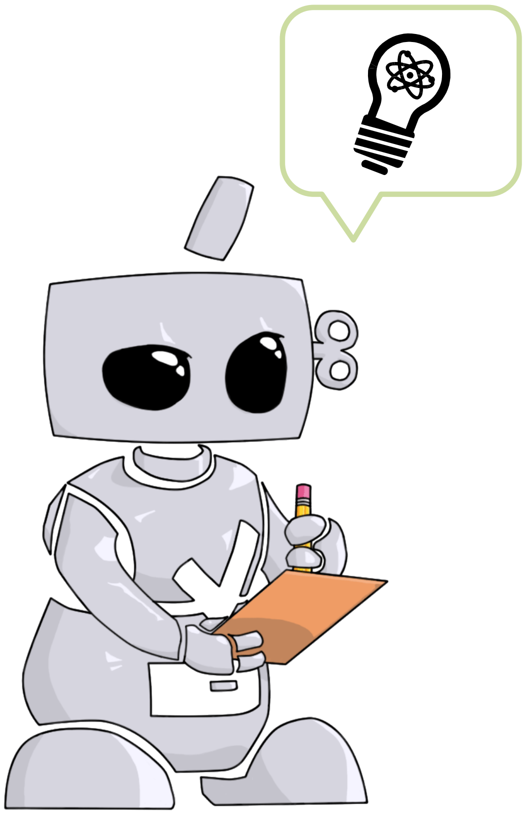
What is Complio?

Why Complio?

Welcome to Complio! This user guide is to be a resource to assist in using Complio, but always know that American DataBank is a phone call away. We are always willing to help!

1) Complio is an immunization and compliance tracking system, used by our clients to host your documentation and related information to be used to prove your compliance in regards to a list of requirements.

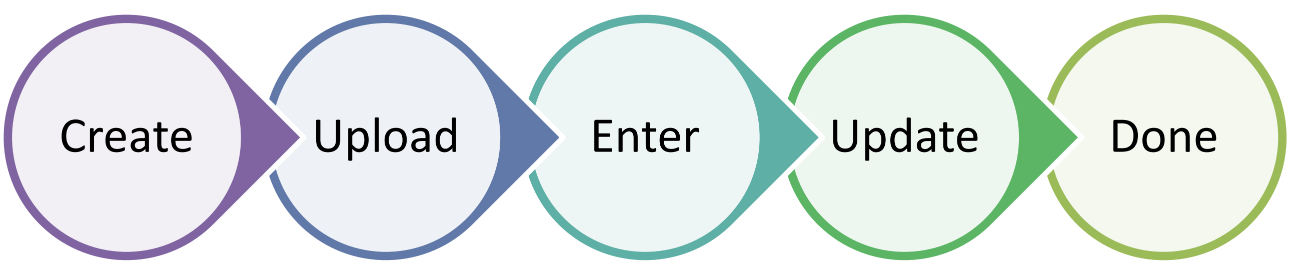
2) It is our goal to make Complio as easy a process as possible for all users, taking your documentation and entered information and giving you a transparent view into your ongoing status.



Steps to Compliance

The **Complio** process is simple and straight forward with just four basic steps to complete.

- **Create** your account.
- **Upload** your documents.
- **Enter** details for each immunization requirement.
- **Update** information that changes over time, such as shots received in a series or re-certification.

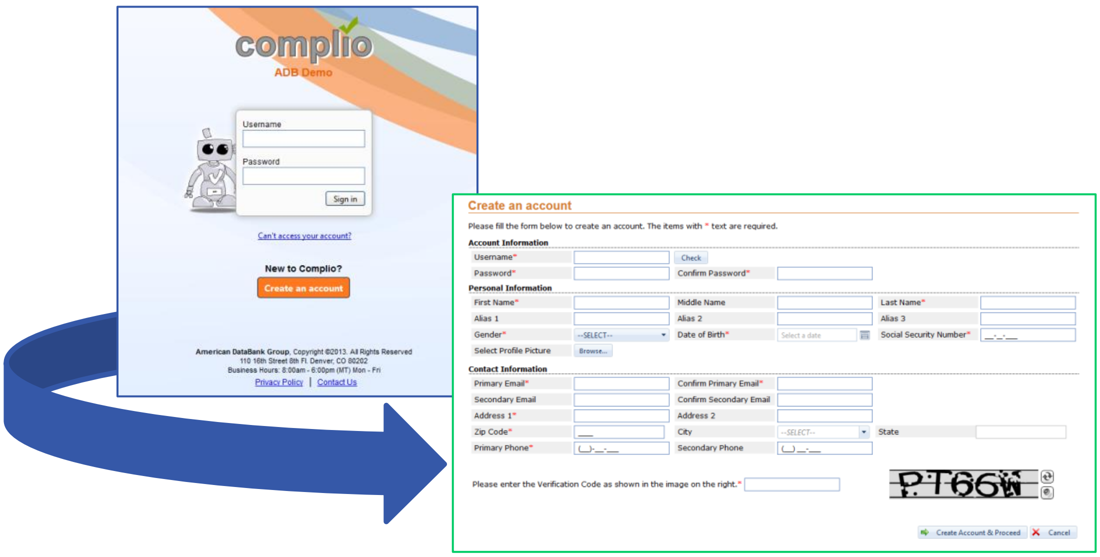


Step 1: Create your account

Create

1 Go to the **Complio** website for your Institution.

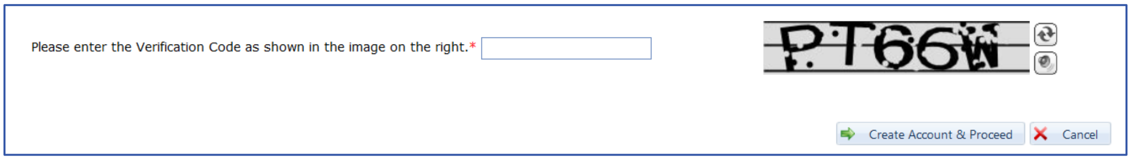
2 Click the **Create an Account** button near the center of your screen.



3 Complete the required information.

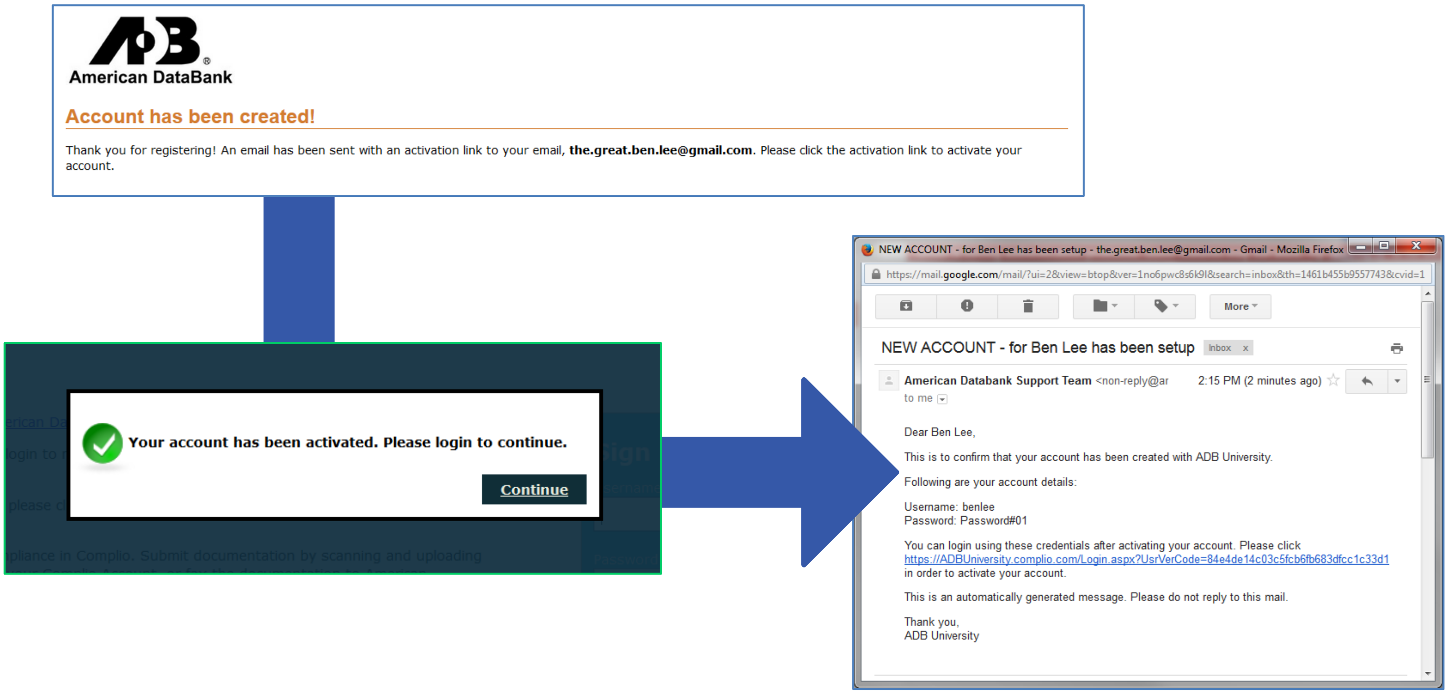
- If any of your documents contain a prior name, such as a maiden or alias name, entering your **Alias Name** will help with the verification process. If you have not used any other names, please leave these fields blank.
- To ensure the security of your personal information, please select a **Password** that includes a Capital Letter, Number and Symbol.
- **Tip:** If you do not have a Social Security Number, you can enter nine 1's in the required fields.
- You can customize your account by uploading a **Profile Picture**.
- Be extra careful with your **Email Address**, as you will need to respond to an email from Complio to complete your Account Creation.

4 Enter the **CAPTCHA** code. The code is not case sensitive. You can use the icons to the right of the code to have it refreshed or to hear the code read aloud.



5 After you are taken to a **Confirmation Screen**, an email that includes an **Activation Link** will be sent to the primary email address you provided. Click this link to access your account.

- Complio uses the email address you registered with to alert you to reminders and messages from your Institution.
- **Tip:** If the activation link within the email message does not open Complio, you may need to copy and paste the link into your web browser directly.
- Once you click the link, you will receive an **Account Activation Notice** on screen. Click **Continue** to move on and begin using your account.



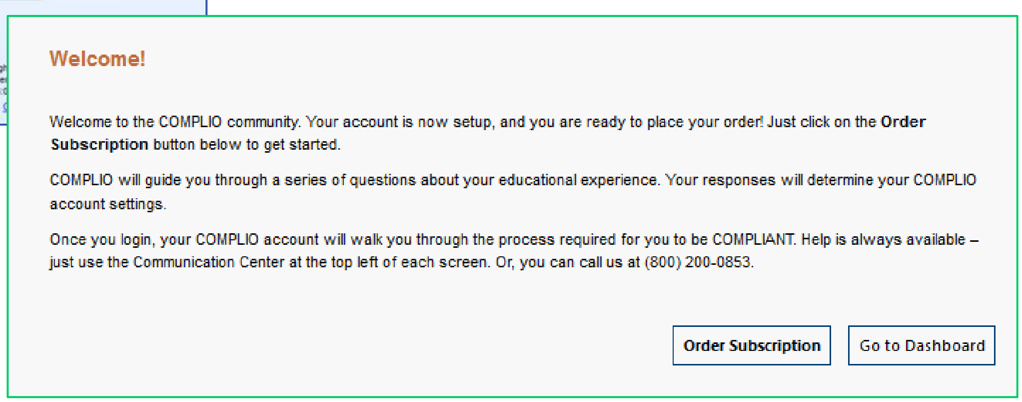
Log in to Complio

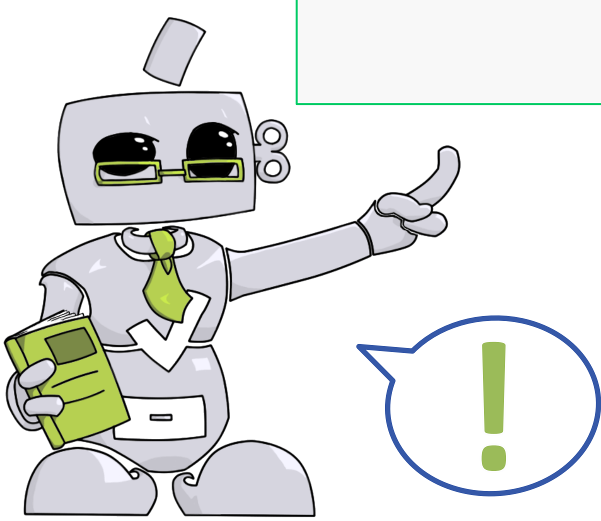
Return to the website and enter your **User Name** and **Password** to **login.**

You should be taken to the **Welcome Screen**.

- <u>If you are new to Complio</u>, you can create a **Subscription** using **Complete Pending Order**.
- <u>If you are returning to Complio</u>, **Go to Dashboard** to view account details, messages, tasks and much more.

Can't remember your password? Click here!





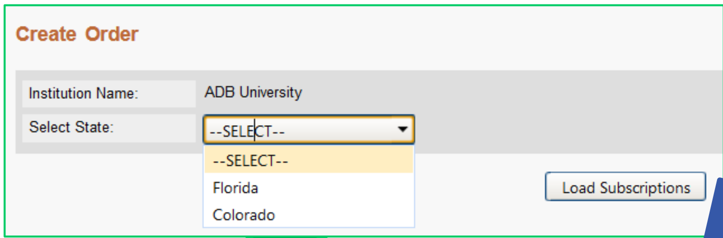
Wait!

An Account is not the same as a Subscription! Before you can begin entering information and tracking compliance, you will need to order a subscription on the next screen.

Subscribe

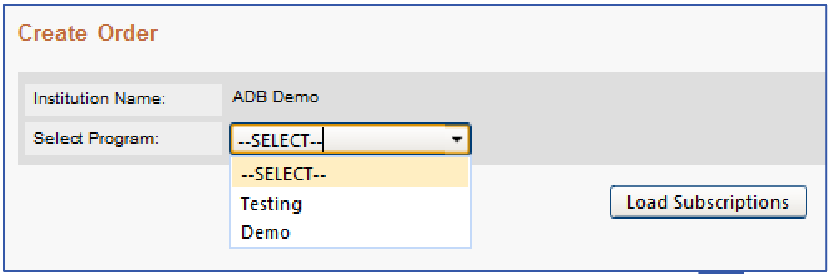
Now that you have an Account, you need to **Subscribe** to Complio.

1 Go to the specific website for your Institution. Log in and click **Order Subscription.**



2 On the next screen, you will indicate specifics such as your Institution, Department and Program, etc. The information required is customized for your Institution.

Subscription options were developed with your Institution to ensure that you are compliant with all requirements needed over time.

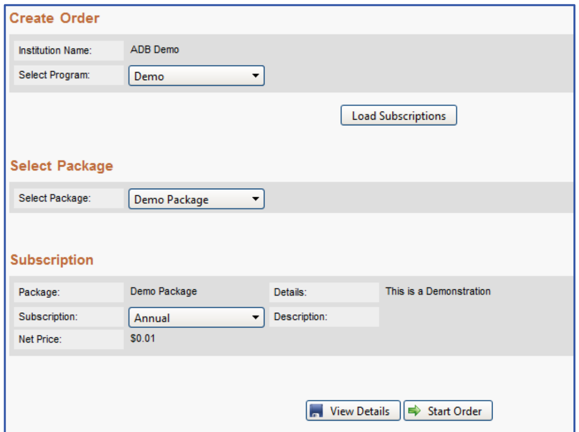


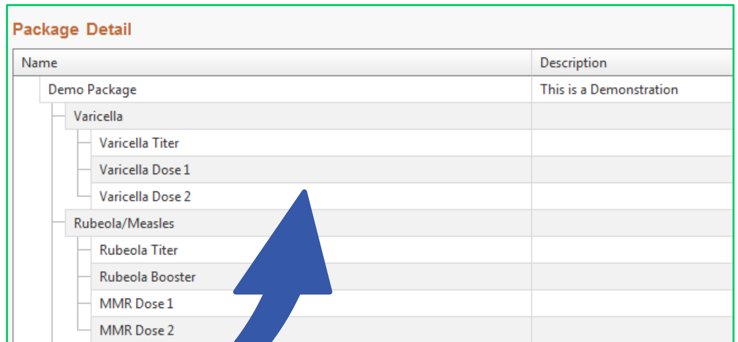
What to Pick...

Once you've provided Institution, Program and other details, click **Load Subscriptions** to see information on the Packages available to you.

If you are unclear which subscription you need, please contact the individual at your Institution who directed you to Complio and request clarification before proceeding.

3 Next you will **Select a Package.** At least one package will be available, but there may be several options to select from. Please refer to the instructions provided by your Institution to ensure you select the correct package.

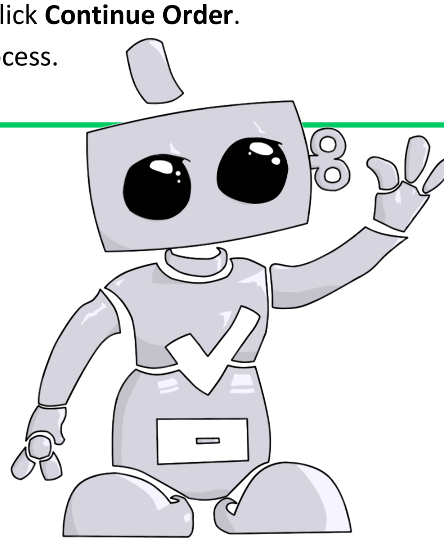




4 The bottom half of the screen outlines **Subscription** details such as price and the length of the subscription. You may have an option to select different lengths (in months) for your subscription, this will vary by Institution.

5 Next, you can select **View Details** or **Start Order.**

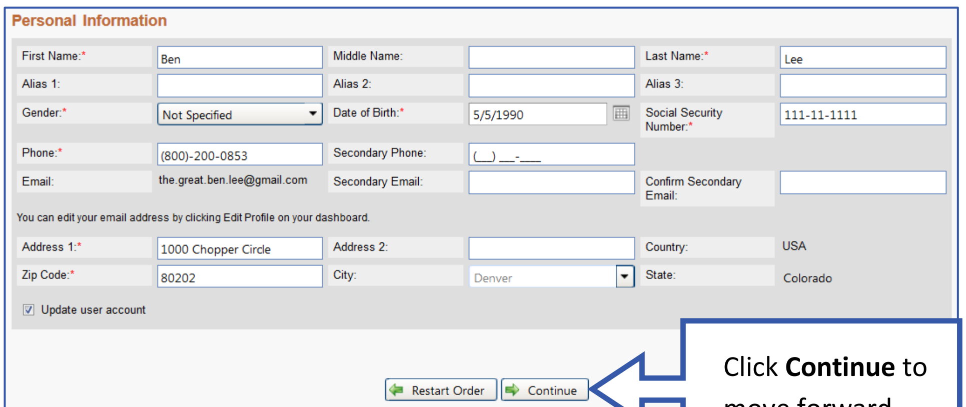
- **View Details** will display the compliance requirements associated with the Subscription. To exit this screen, scroll down and click **Continue Order**.
- Or, click **Start Order** to continue with the order process.



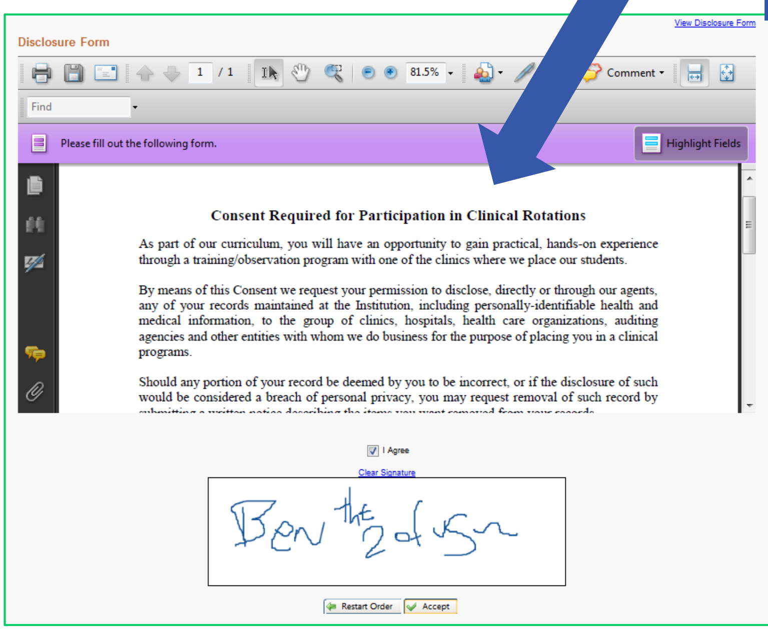
6 The next screen will populate with the **Personal Information** entered when you created your account. At this time, you can review the information for accuracy and correct as necessary.

Important: Please double-check your **Email Address**, as Complio messages and updates will be sent to the email address associated with your account.

If you see an **Other Details** section on this page, the information requested is specific to your Institution/Program, so please complete these fields.



Click **Continue** to move forward.



7 **Read** the Disclaimer, and **then Sign** by holding down the left-mouse button and drawing.

It is like signing for your Credit Card at the Store. Click **Accept** to move-on.

This process may repeat if your institution has multiple forms.

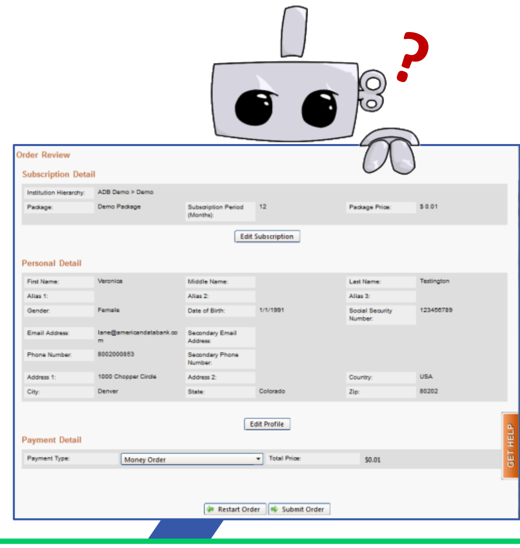
8 You will be shown the signed Disclaimer. Click **Proceed** to continue.

Wait!

You now have one last chance to double check your order on the **Order Review** Screen.

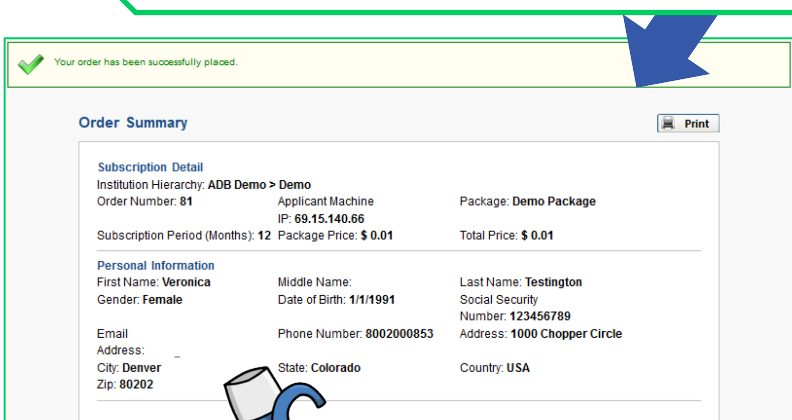
Here you can:

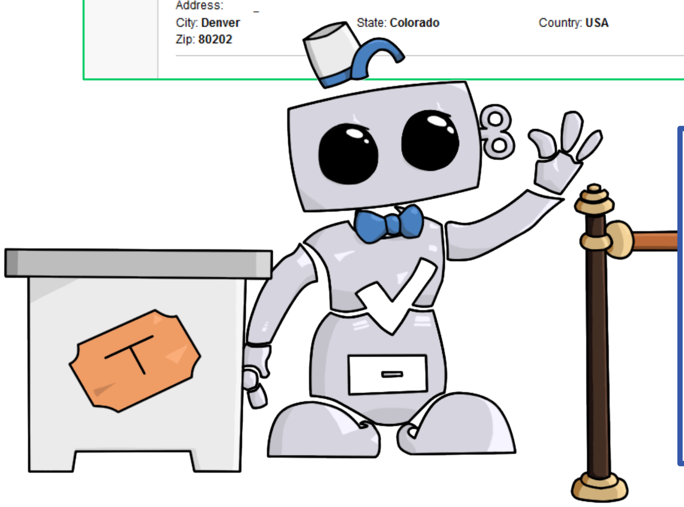
- Edit your Order
- Restart your Order
- Submit your Order



9 Under **Payment Detail** you can review the cost of your subscription and select a payment option to (depending on your Institution's settings).

- Select your preferred payment method and click **Submit Order**.
- Complete the **Payment Screen.**
- After payment is received, you will receive an **Order Summary**.
- Click **Go to Dashboard** to start entering information in Complio.

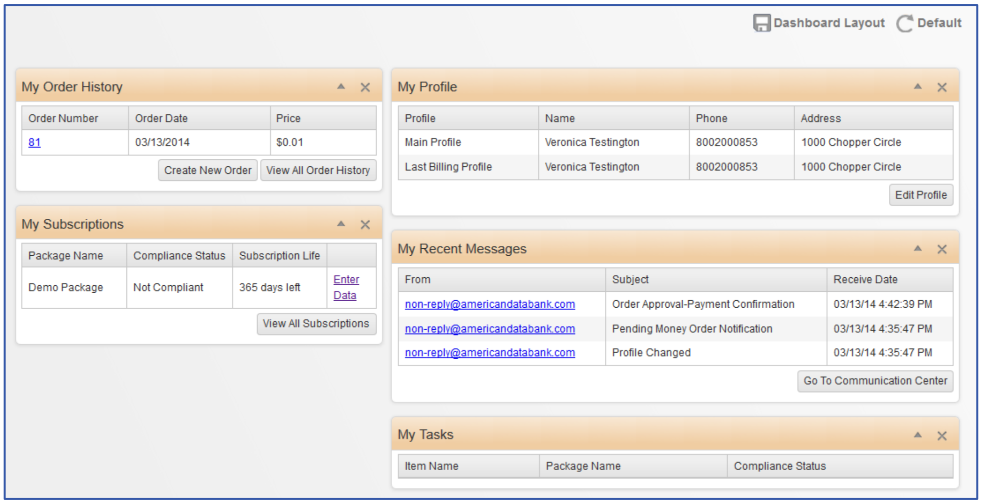




Payment Notes

Depending on your **Payment Method**, it may take a while for your account to be activated. You will receive an email when your payment is approved.

- **Money Order**: Your account will activate once American DataBank receives your payment in the mail.
- **Invoice**: Your account will activate once your Institution approves your subscription.



Your Dashboard

Now that you've subscribed, Complio will take you directly to your **Dashboard** when you log in. Your Dashboard offers a quick snapshot of several Complio areas:

- **My Order History**: Your list of orders placed
- **My Subscriptions**: A list of your Complio Subscriptions
- **My Profile**: Information associated with your account. You can update this at any time.
- **My Recent Messages**: Your unread alerts and notifications from Complio.

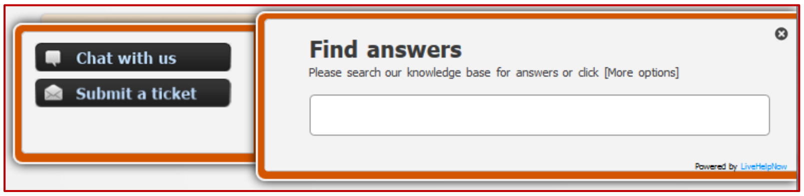
  Once you read them, the message will disappear from the list. You can access them again from the **Communication Center**.

  Click **Go to Communication Center** to read and reply to messages.
- **My Tasks**: A list of expired or expiring items and any due dates set by your institution. Important notices will appear here throughout your subscription.

Wait!

You may have noticed the small **Get Help** widget on the right of each screen.

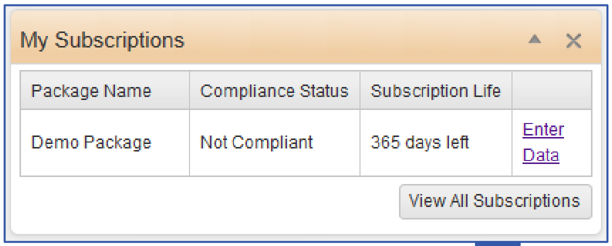
This widget can get you more information about Complio or even link you to a live representative during business hours.

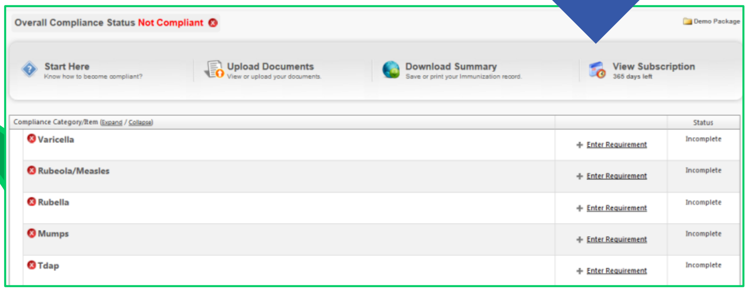


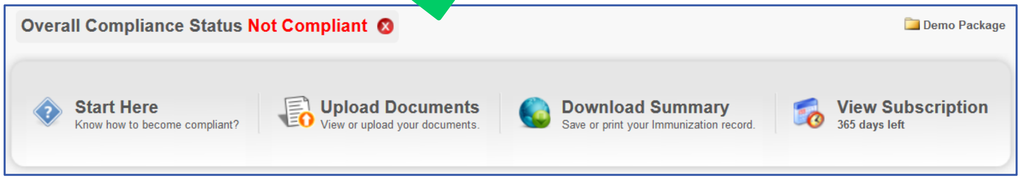
Enter Data

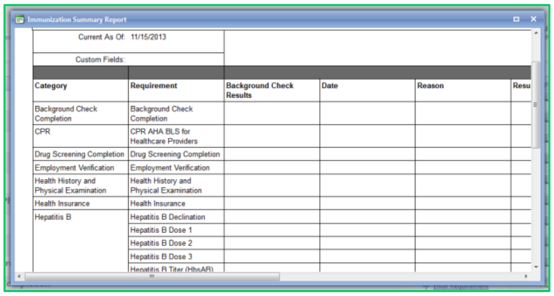
Ready to enter your information? Within **My Subscriptions,** follow the **Enter Data** link.

You will be shown a list of requirements – Click **Enter Requirement** to begin entering data for a specific requirement.









Overall Compliance Status

Your record will be either **Compliant** or **Not Compliant**. This is how your Institution will determine your **Overall Compliance Status.**

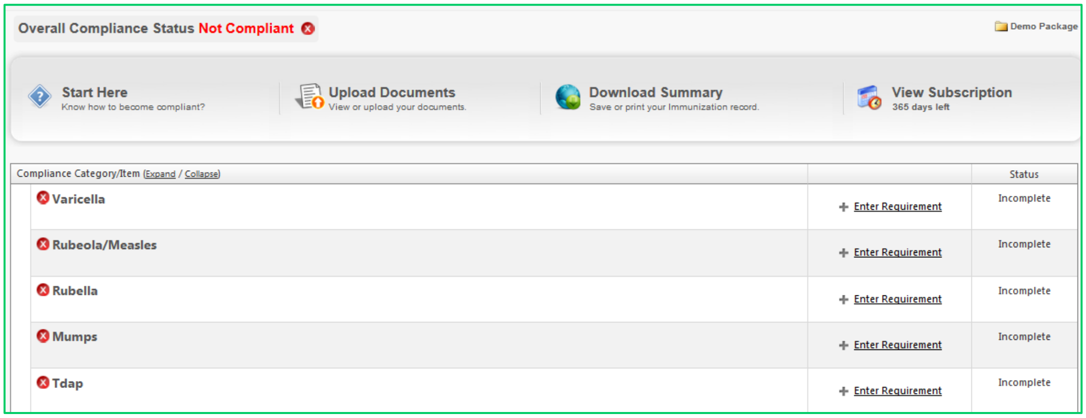
Note: You will remain **Not Compliant** until:

1. You've entered information to complete all requirements.
2. The information you've entered has been approved.

Info Bar

Within the **Data Entry Screen**, you'll be able to see the **Information Bar** with the following options:

- **Start Here** provides a summary of the requirements you must meet to achieve compliance. You can print this document and use it as a reference when gathering your records and paperwork.
- **Upload Documents** allows you to upload and manage your documentation.
- **Download Summary** generates a summary report of individual requirements. Not only will this allow you to quickly identify any missing items, you can also print the report as proof once overall compliance has been achieved.
- **View Subscription** shows you the number of days remaining on your Complio subscription.



Category List

The list of requirements includes **Categories** and **Items**. Requirements may be *recommended* and not required, or have very specific timelines. Please read the instructions carefully and familiarize yourself with each requirement.

- At the left of each **Category**, you will see a **Status Icon**.
  - A **red X** indicates an item or items in that Category require your attention.
  - You want a **green** or **blue** checkmark next to each Category, as that means you are fully compliant.

- The **Category Name** indicates the type of requirement. A category may include different items, and there may be different routes to achieve compliance.
  - Many requirements will be immunizations, such as a titer or shot, but others might just be a question to answer, or a signed form or copy of a certification.

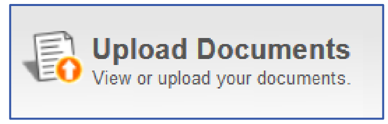
- Clicking the **Enter Requirement** link will allow you to edit that specific **Category**.

- The last column shows your **Status** for the **Category**. The status will update as you enter information in your account and as each item is reviewed by an Administrator.

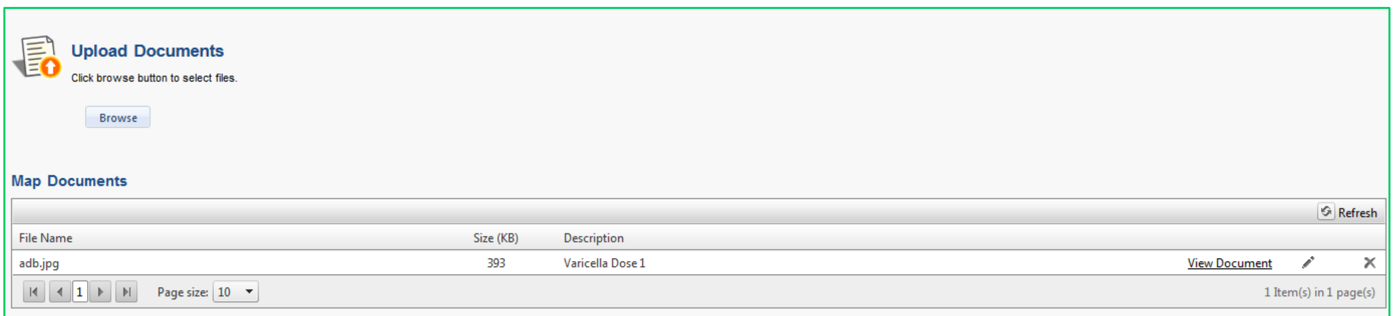
Upload

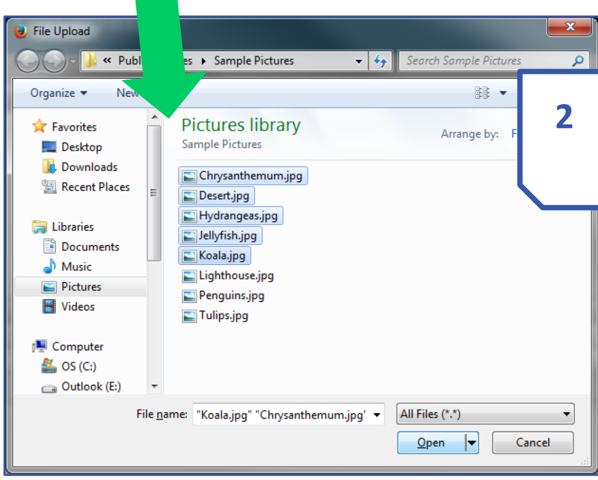
You can **Upload Documents** using the icon located to the right of **Start Here** on the **Data Entry** screen.

We recommend uploading documents first, but you can also add documents during data entry.

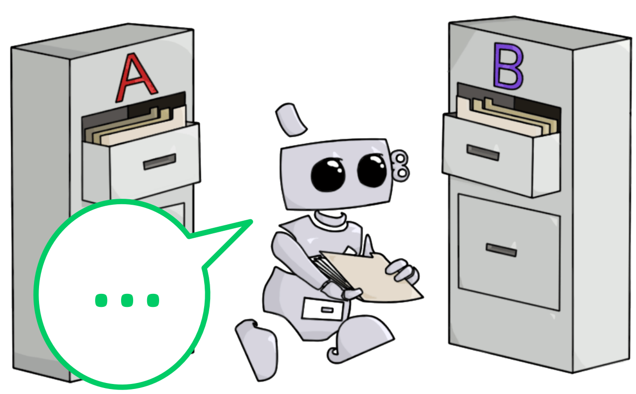


1 On the **Upload Documents** screen you will be able to browse and upload your records to Complio. You can upload multiple pages at one time. You will also be able to view any documents you uploaded previously.





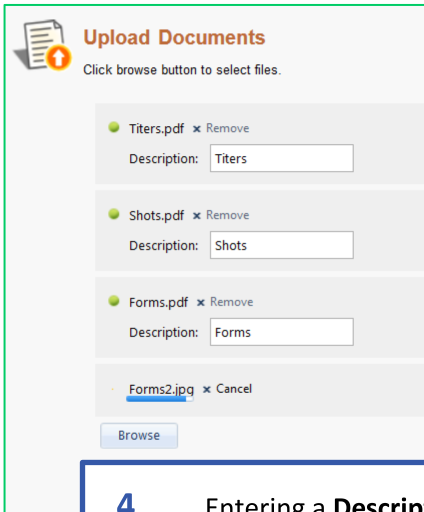
2 A pop-up window lets you search your computer for files. You can highlight multiple documents and then click **Open** to upload them.

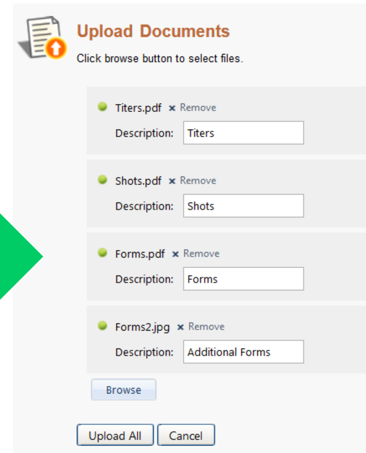


Upload Documents

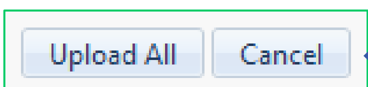
3 You will see a **Progress Bar** by each document as you upload the files.

If your document has a **Green Dot** next to it, the file has been uploaded.

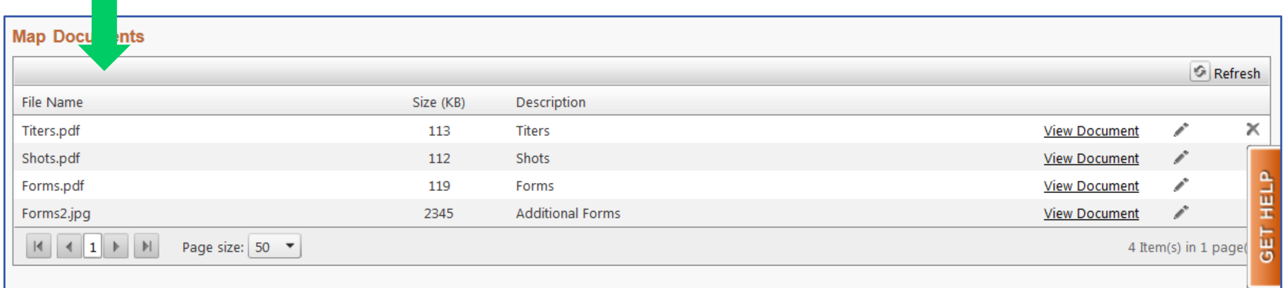




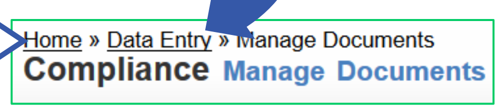
4 Entering a **Description** for each file will help you find documents later.



5 Click **Upload All** to finish. If you do not want to upload these documents, you can **Cancel** the upload.

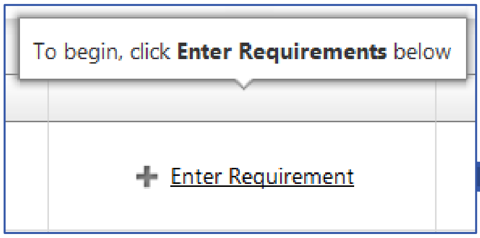


Click **Data Entry** to return to the Data Entry Screen.

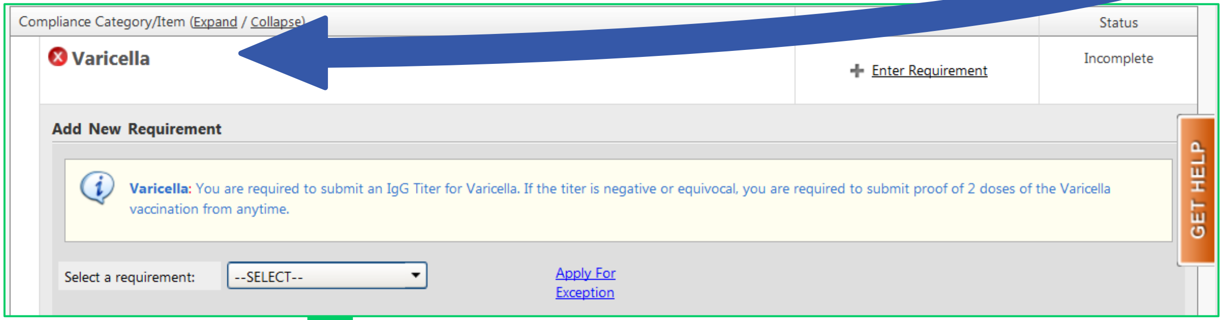


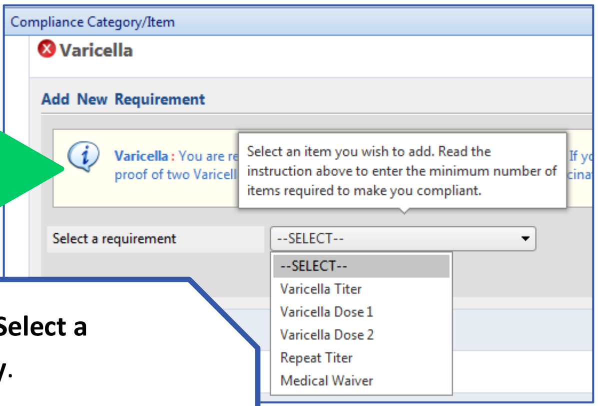
To become **Compliant,** you'll need to enter details and/or associate documents with each requirement in Complio.

Enter



1 To get started, click the **Enter Requirement** button for the specific **Category** you would like to enter and upload.

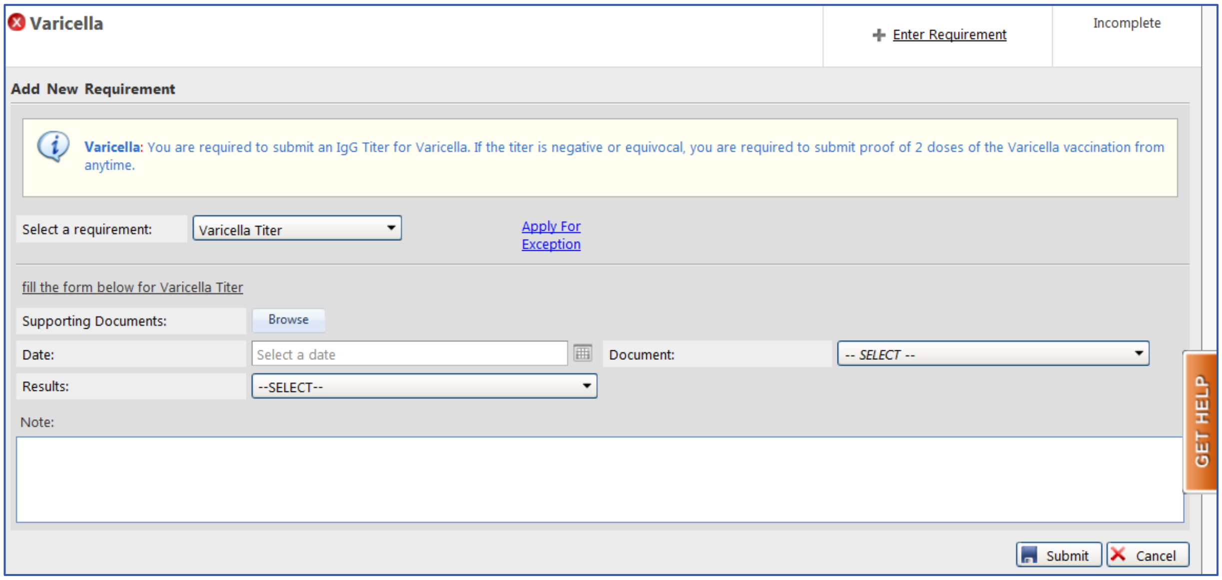




2 You will see an explanation of the rule and will be instructed to **Select a Requirement**. The list reflects all of the options for this **Category**.

- There may be multiple options, but you *may not* need to complete them all.
- Options will be explained in the **Note** in this section.
  - Some items will be mutually exclusive. Like having two options for CPR Card. You won't have both ever, just one or the other.

Click into the **Select a Requirement** drop-down and pick an Item to enter.



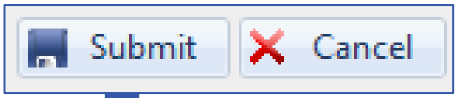
3 Now, you will see fields to enter information for this **Item**. The fields shown will vary depending on the chosen item and the requirements of your Institution.

For example:

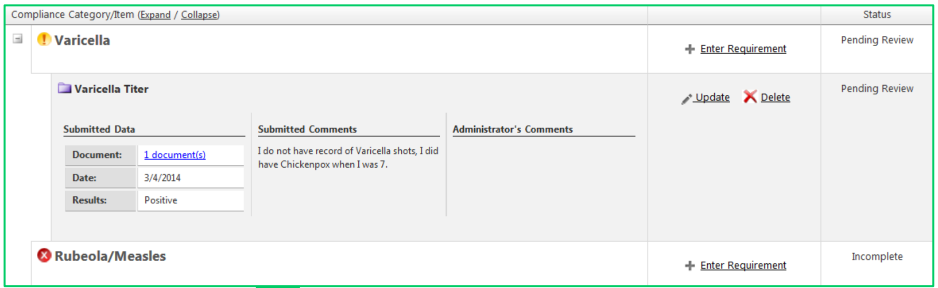
- Shots will usually have associated dates
- Blood tests will ask for results
- A physical exam might simply require an uploaded document

Data Entry

- If a **Date** is required for an Item, you can type the date (month, day, year), or use the small **Calendar** button to select it.
- Most items will require a document to serve as proof of compliance. Select the correct document from the **Supporting Documents** that you uploaded earlier. You can also **Browse** for a file if the document you need has not yet been uploaded in Complio.
- Depending on the **Item** being tracked, you may need to enter **Results** or answer additional questions, etc.
- You can write a **Note** to explain something to the Administrators viewing your account. However, please do not ask questions here, as they will not be prioritized appropriately. The best place to ask questions is through the **Communication Center**.



4 Once you've entered all of the fields, click **Submit** to complete the Item.



5 The **Category/Item Status** will change providing confirmation that the information you entered was successfully submitted.

- **Items** will change **to Pending Review** once entered.
- **Categories** will only change to **Pending Review** if the whole **Category** is complete.

For example:

If you can submit 2 Shots or 1 Titer for the Category, you would be **Pending Review** with 2 Shots but **Incomplete** if you only submit 1 Vaccination.

Supporting Documents

Forgot to upload a document? You can still upload additional documents during the **Enter Requirement** process.

- Click **Browse** to find a Document.
- The uploaded document will automatically 'associate' with the **Item**.
- **Note:** The document will not appear in the dropdown until after you click **Submit**.

 Questions? Email us at complio@americandatabank.com
Complio v.2.1 Created: 05/21/2014

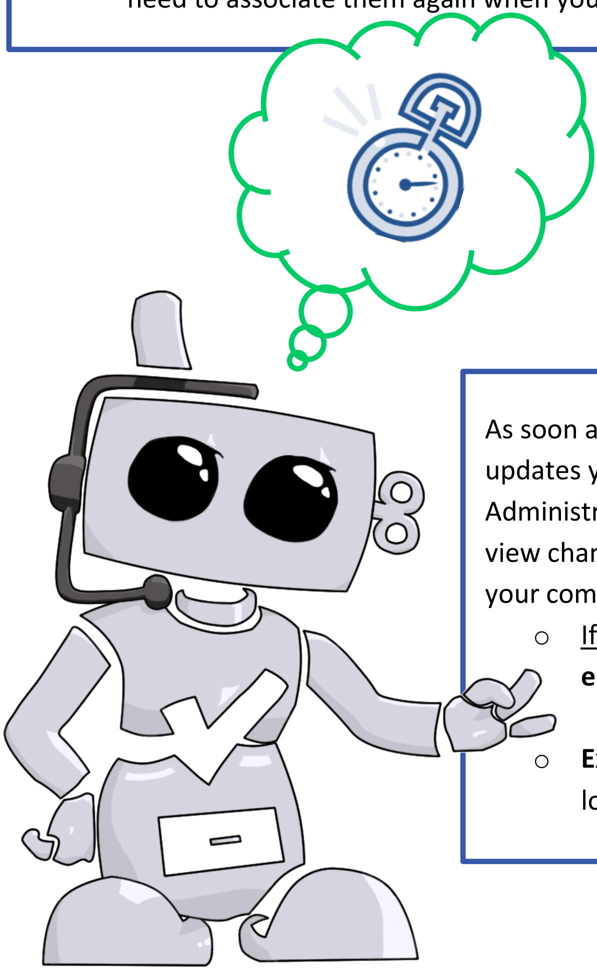
Update

Supporting Documents

Many **Categories** will include more than one **Item,** like a shot series for Hepatitis B or two-step TB Testing. Please review each Category closely to confirm you've entered all of the items that you have completed.

Once you have entered one **Item** in a **Category**, you will see a small **+** sign next to the Category. This will allow you to see the data entered for that Category. If the Item is still **Pending Review**, **Rejected**, or **Expired**, you will be able to update it.

- Click **Update** to modify your submission.
- You can also **Delete** the entry and start over if necessary.
- Deleting an Item will <u>not</u> delete the associated documents from your account, but you will need to associate them again when you re-enter the Item.

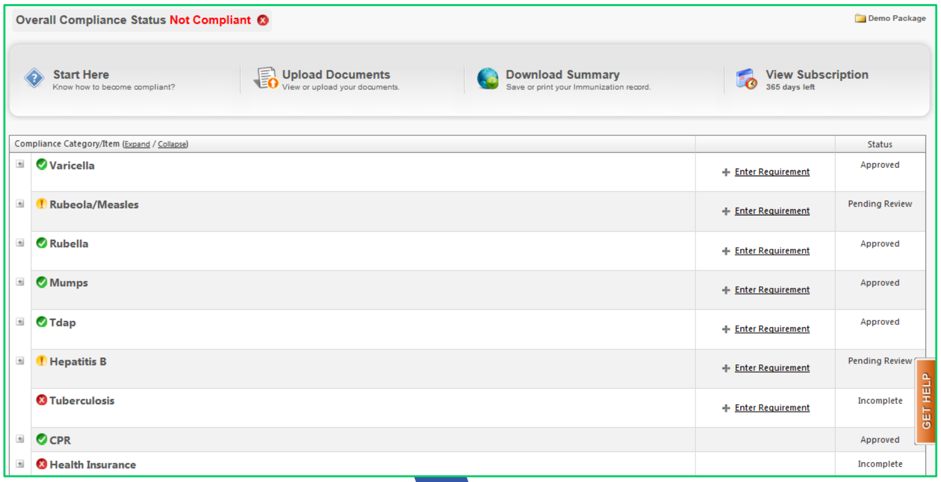


Turnaround Time

As soon as you click **Submit,** Authorized Administrators will have access to the updates you've made. However, it still may be some time before your Administrator reviews and updates your account. You will instantly be able to view changes on your **Dashboard**, and you will receive a Complio message when your compliance status changes after it is reviewed.

- <u>If Applicable</u>: **American DataBank will verify documentation and data entered within 1-3 Business Days** (Excluding Weekends and Holidays).

- **Exemptions**, which must be approved by your Institution, may take longer for approval, particularly near a deadline.



Know your Status

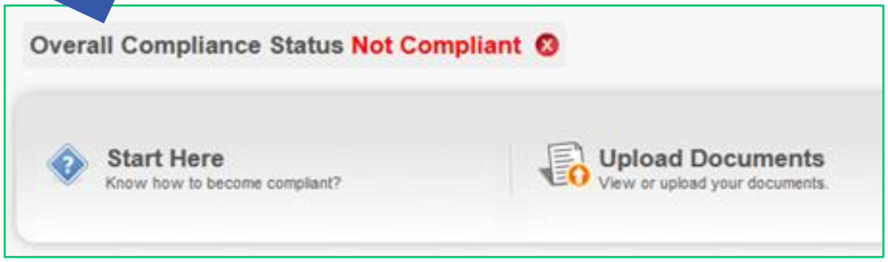
Your Complio account has three **Status** types that contribute to your overall compliance:

1) **Item Status**: This is the Status of an individual item. Item status will be dependent upon items entered, expiration date, whether your proof was accepted, etc.

2) **Category Status**: This is the Status of an entire category. The status will change as you enter items and as items are approved.

3) **Overall Status**: This is the Status of your Complio account as a whole. Overall Status will only change when all Categories are completed and approved by an Administrator.

Tip: Your **Overall Status** is the easiest way to monitor your compliance in Complio.

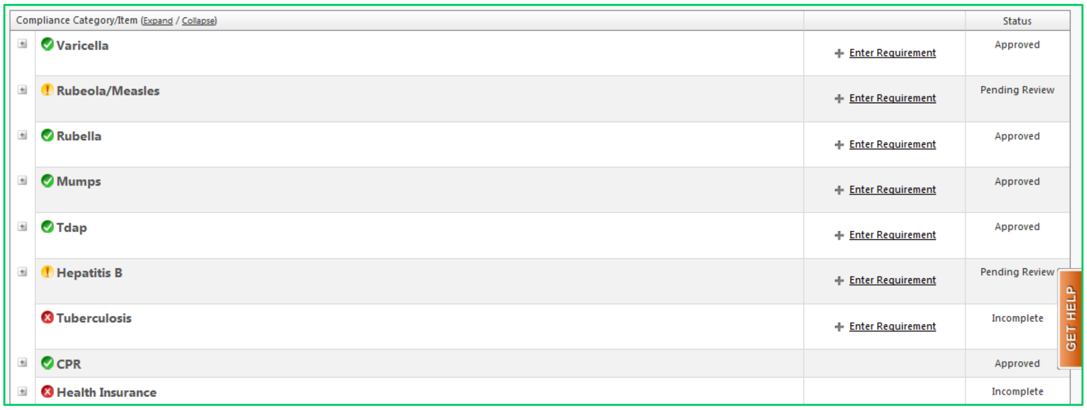


Overall Status

Your **Overall Status** will always be either Compliant or Not Compliant:

1) **Compliant** = all Categories are complete and approved at this time. Because some requirements will expire, your Overall Status may change over time.

2) **Not Compliant** = one or more items are incomplete, not accepted or expired. Please check individual Category and Item Statuses to see which one(s).



Compliance Category/Item (Expand / Collapse)		Status
Varicella	+ Enter Requirement	Approved
Rubeola/Measles	+ Enter Requirement	Pending Review
Rubella	+ Enter Requirement	Approved
Mumps	+ Enter Requirement	Approved
Tdap	+ Enter Requirement	Approved
Hepatitis B	+ Enter Requirement	Pending Review
Tuberculosis	+ Enter Requirement	Incomplete
CPR		Approved
Health Insurance		Incomplete

Category Status

Complio shows Category/Item compliance in two places: There is an Icon on the far left in the Data Entry area, and a Status column on the far right. All Categories and Items begin as Incomplete, move to Pending Review and end as Approved (or Exceptionally Approved).

Potential Category Statuses:

Approved = Category and Items are Complete and have been Approved by an Administrator. The Icon will be a **Green Checkmark** and the Category will contribute to an Overall Status of Compliant.

Incomplete = Category is not complete, not compliant and/or includes items that were rejected by an Administrator. The icon will be a **Red X** and Overall Status will be Not Compliant. An Incomplete Category can include Pending Review Items, if they are awaiting approval.

Pending Review = Category includes at least one Item that is Pending Approval by an Administrator. The icon will be a Yellow Exclamation Mark and Overall Status will be Not Compliant (until the Items are approved).

- **Note:** Pending Review status will only appear at the Category level if Approval of the pending Item(s) would result in an Approved status for the Category

Exceptionally Approved = Category was approved with at least one Exception. The icon will be a **Blue Checkmark** and the Category will contribute to an Overall Status of Compliant.

Expired = Category includes at least one expired item. The item status for the specific requirement will also be expired, and notices will be sent (in advance) to you attention to warn you of the deadline.

Item Status

The Status of each Item is updated in the far-right column, directly under the Category Status.

Blank = no data entered yet. The Category will be Incomplete without the expansion (+/-) icons.

Approved = Item has been approved by an Administrator.

Approved with Exception = An Exception was requested for the Item, which was accepted by an Administrator.

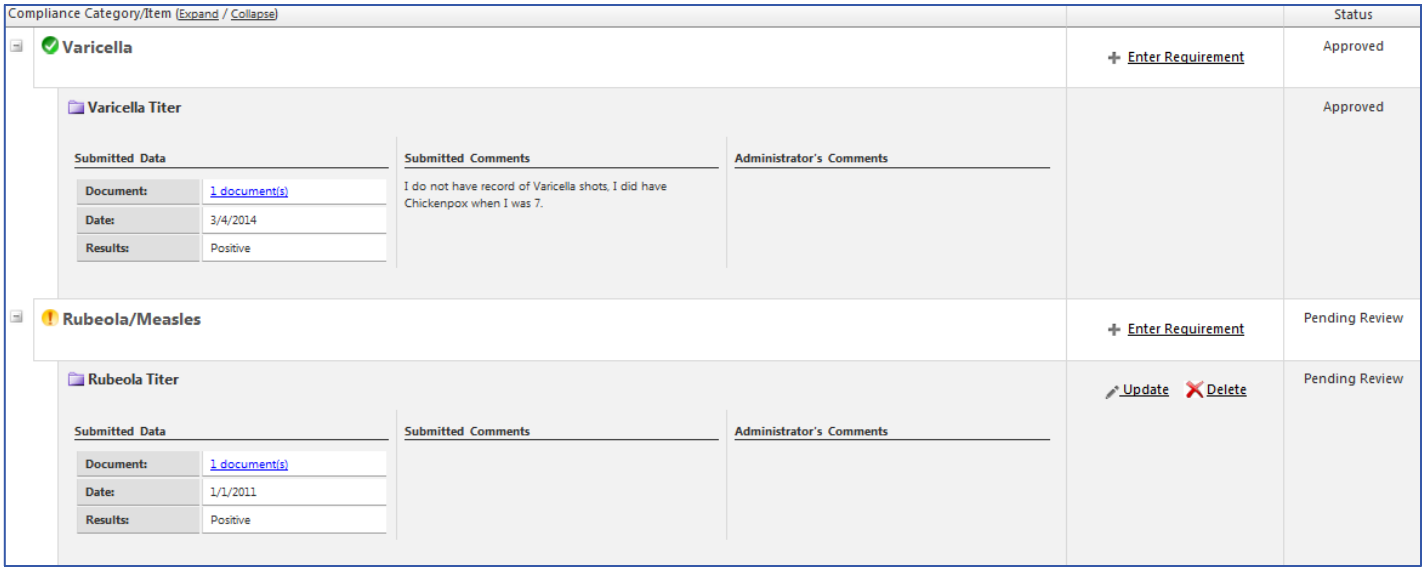
Not Approved = Item was rejected and will include a Note explaining the rejection. You will be able to Update and/or Delete the Item.

Pending Review = Item has been entered and is pending approval by an Administrator.

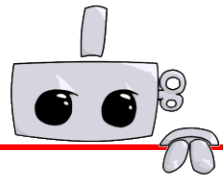
Applied for Exception = Exception request is awaiting approval by an Administrator.

Exception Rejected = Exception request was rejected by an Administrator. There should be Notes in the system as to exactly why the item(s) were rejected.

Expired = Category includes at least one expired item. The item status for the specific requirement will also be expired, and notices will be sent (in advance) to you attention to warn you of the deadline.



Requesting An Exception



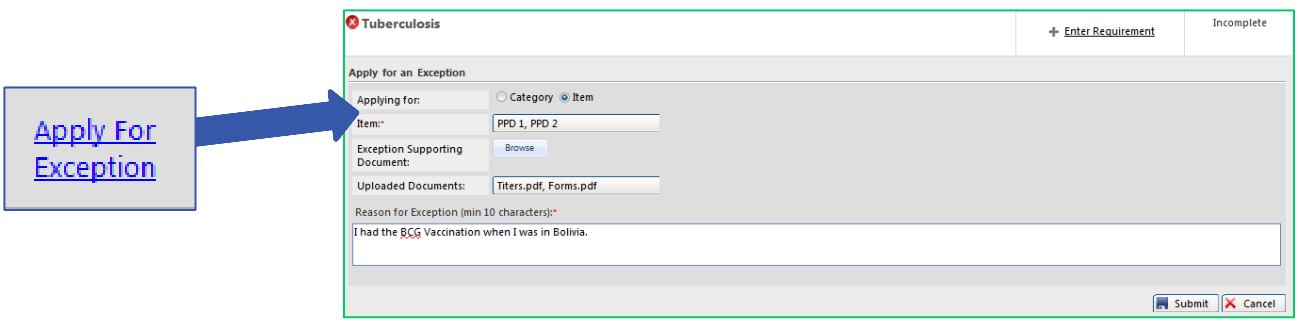
Wait!

Exceptions are reserved for requirements that you cannot meet because of medical, religious or other reasons. Examples could be current pregnancy, an allergy, religious exemption, a medical condition or a doctor's recommendation.

The Exception Request Form is not:

- A way to simply 'skip' a requirement. You will a need to include a *reason* and supporting documentation when you request an exemption.
- A way to ask a question. Please contact American DataBank through the **Communication Center** or via email or phone if you have a question.

Please note that Exceptions must be approved by your Institution, and will only be accepted if they fall within the accommodation policies of your Institution.



1 Click the **Enter Requirement** for the **Category** you need an exception for, then click **Apply for Exception** to get started.

2 You can either request an Exception at the **Category** or **Item** Level

In general, the request will be for an Item, but sometimes (such as with an allergy) you might request a Category Exception instead.

3 Select a **Document** that supports your need of the **Exception**, such as a note from a Healthcare provider, a medical record, etc. You can browse for a document to upload or select from the drop-down list of previously uploaded documents.

4 You'll need to explain **why** you should be exempt from this requirement.

Please be detailed in explanation, as your note will be sent to the Administrator who will Approve <u>or</u> Reject your Request for the Exception.

5 Click **Submit** to send your request to the Administrator for review. The Item Status will change to **Applied for Exception.**

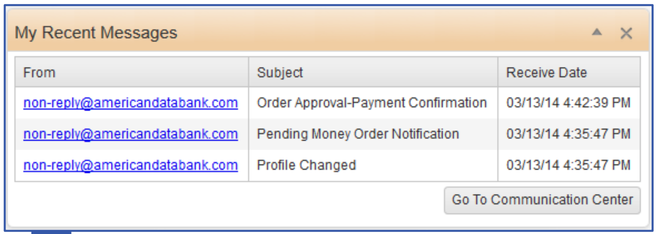
If An Exception Is Rejected

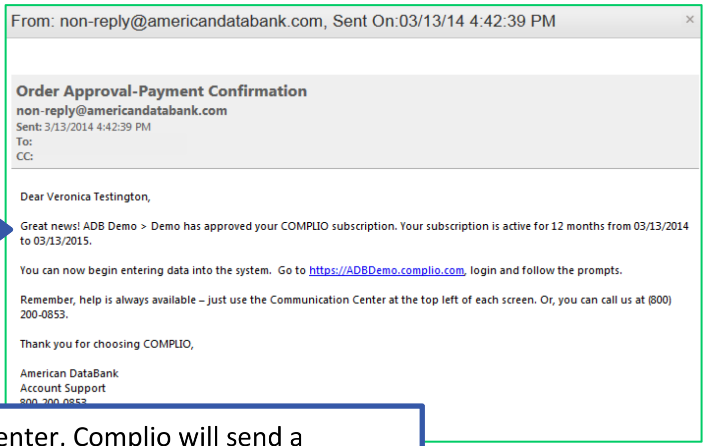
Your Administrator may reject your request for an exception for one of several possible reasons: a clinical location your Institution uses may not allow for the exception, the Administrator may determine you've submitted insufficient proof or determined the reason you provided is invalid. If the **Exception is Rejected**:

- The **Category** will appear as **Incomplete** AND
- The Item will appear as **Exception Rejected**.
- The Administrator will write you a note as to why you were rejected, and you will be able to **Delete** or **Update** the items as you need to.

If you have questions about a request that was rejected, please contact an Administrator for more information. We do not recommend simply requesting another exception with the same documentation, as the request is likely to be rejected again.

Messages and Notices





Complio Messages

When you receive a message in the Communication Center, Complio will send a notification to the email address associated with your account.

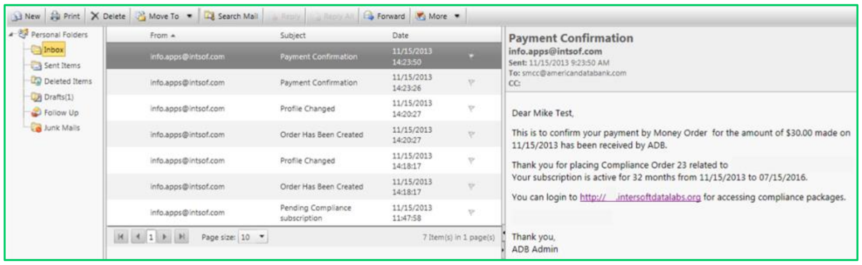
Please check your email frequently to ensure you do not miss an important message. For your privacy, you may need to follow a link from the email and log in to Complio to read messages.

New messages will show in the **My Recent Messages** section of your **Dashboard**.

Using Communication Center

1 Click **Go to Communication Center** to contact American DataBank or an Administrator, to review previous messages or send a new message.

2 Here you can view and send messages. Click **New** to start sending a message.



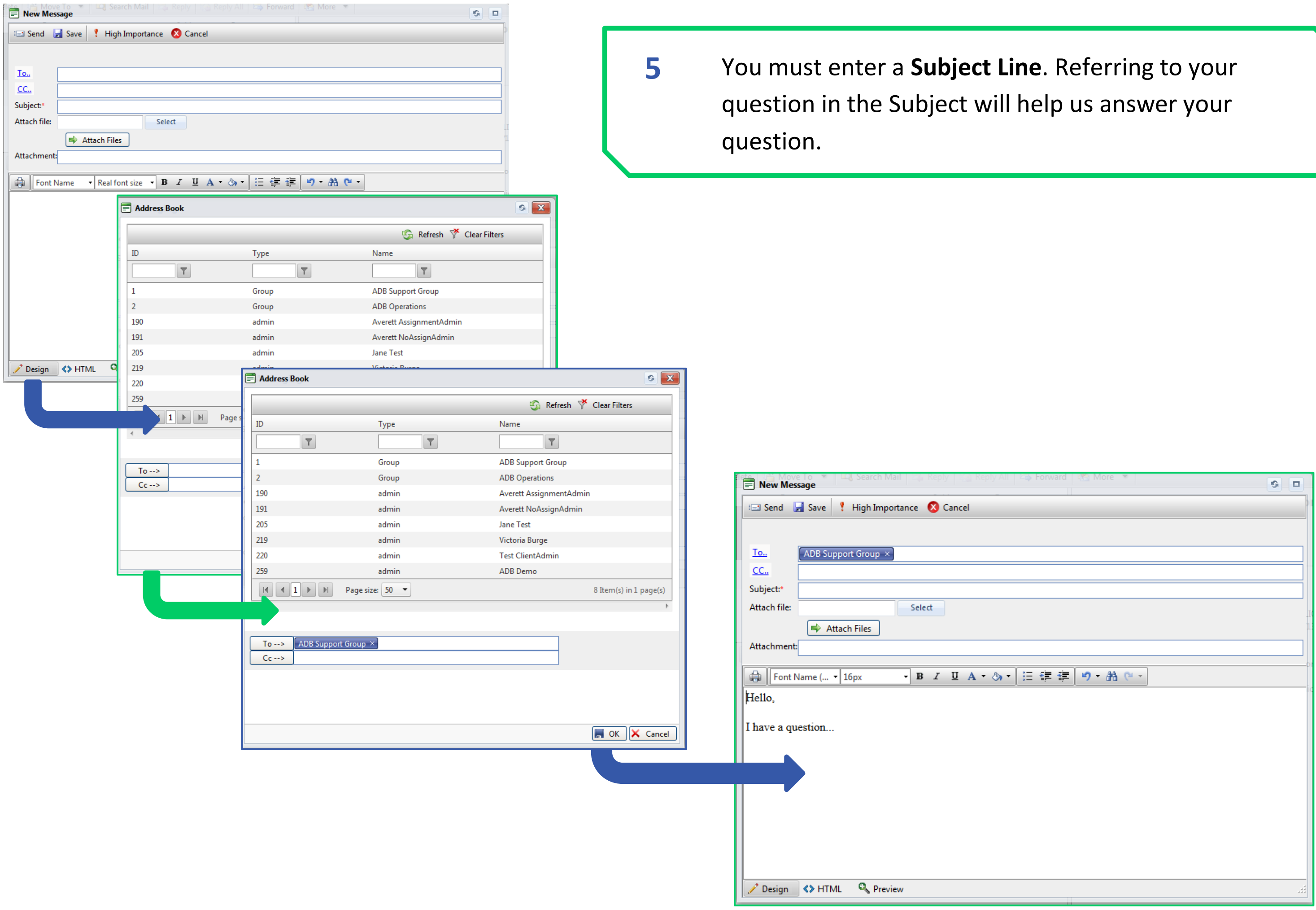
3 Click the **"To"** link on the left to select the recipient(s) of your message.

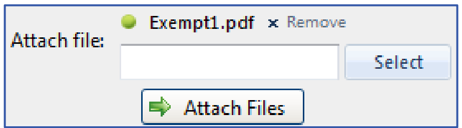
4 Your **Address Book** will open and from here you can select from the list of Authorized Persons.

Click an entry to select the person (it will change color). Then click either **To** or **CC** to add them as a recipient.

Then click **Ok** to move forward. The person(s) will be added to the fields you requested.

5 You must enter a **Subject Line**. Referring to your question in the Subject will help us answer your question.





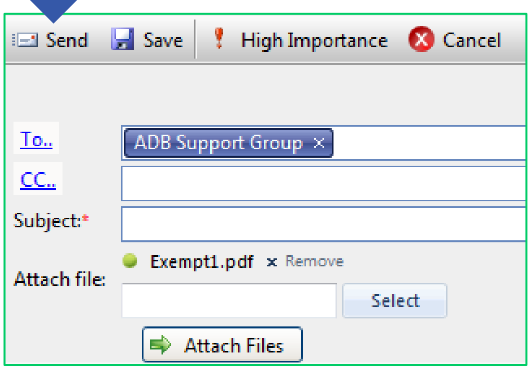
6 You can **Select** and **Attach a File** to the message.

- Click **Select** to open a window to find your item(s).
- Click **Attach Files** to attach that file after it uploads.
- You will see your file(s) listed in the **Attachment** section.

7 Now, you can write your message. The formatting buttons are available for your use. These function similarly to those other mail services and word processing programs.

8 You can choose to **Save** your message as a **Draft**, or you can **Send** the message.

A copy of all sent messages will be kept in your **Sent Items** Folder.



Reply

You cannot reply to **System Generated Messages**, but you can reply to a message sent by a Complio Administrator. Reply to a message:

- From the Communications Center, double-click to open the **Message.**
- Click the **Reply** button at the top of the smaller window.
- A **New Message** window will open with the recipient information already populated. You can add other recipients, attach files, and then write your reply and send it off.

Contact Us

You're on your way to compliance with Complio.

Please log in to Complio regularly, as your Status will change over time as items expire or when new requirements are added. Simply checking your dashboard periodically will show you what is coming up due, and keep you in good standing.

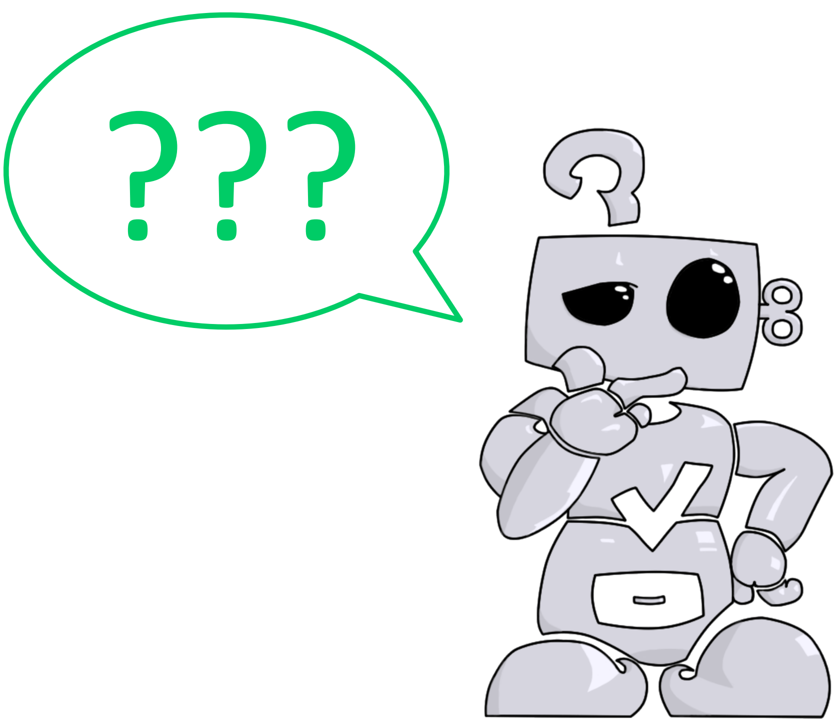
Questions?

American DataBank is here to help. You can call or email with any questions or concerns you may have about Complio, your account, or your status.

Email: complio@americandatabank.com
You'll also see us in your Address Book as the **ADB Support Group** contact.

Phone: 800-200-0853
Full Service: 7am-6pm MT Monday-Friday
Questions Only: 8am-5pm MT Saturday

Address: 110 16th Street
Suite 800
Denver, CO 80202



What do I do if an Item is rejected?

- You can Update or Delete any Item that has is pending approval, expired or rejected. You may need to submit additional or different documentation to become compliant. The Notes provided within the Item by the Administrator should indicate what you need to do.

I can't upload a particular file... What am I missing?

In addition to common document file formats, Complio accepts most file formats created by a digital camera, camera phone or scanner. Be aware that editable formats *may not* be accepted as documentation.

- **Image File Formats:** .png, .jpg, .jpeg, .jpe, .bmp, .gif, .tif, .tiff
- **Document File Format**: .docx, .doc, .rtf, .pdf, .odt and .txt

What if I haven't completed the requirement for an Item yet?

In Complio, you can only submit Items that include all of the required fields.

- If you have not completed an Item yet, you will want to wait to enter the Item.
- Complio is often programmed to accommodate shot series timelines, and there may be multiple ways to achieve compliance. Please read the instructions within Complio to see what is best for you.
- If you believe you may miss a deadline, we recommend emailing your Institution.

I think I may have lost a Message.

- Once read, Complio messages are removed from your Dashboard. However, the Communication Center retains all received messages in your Inbox. Please go to the Communication Center to find all the messages sent to your attention.

I can't complete a requirement for (fill in the blank) reason…

- If you have a 'valid' reason to skip an item, such as an allergy or note from a doctor/nurse, you can request an Exception. Please include supporting documentation with your Exception Request to increase the chances that your request will be approved.

  Please note that some institutions allow exceptions <u>very</u> infrequently. An Exception, even when approved, may
  1. Affect your ability to be placed in some clinical settings, or
  2. Require additional accommodations, such as wearing a mask during flu season, or being removed from rotation during an outbreak of a disease, etc.

Why do you need so much personal information during account creation?

- If any of your records contain a prior name, entering your **Alias Name** will help Administrators to verify your documentation. Other information, like date of birth can help determine if a shot series wasn't available when you were a child.
- If you are uncomfortable entering your SSN or Date of Birth, you can provide fictitious information instead. Example: all 1's for your SSN. These are just used to help verify your documentation. Be aware that true information is needed for any background check ordered from American Databank.

I am having issues logging in…

- Click the 'Can't Access your Account?' link, below the sign-in button. Here you can get your username or a temporary password sent via email. Remember your password is CAsE SeNsitive.
- If you get locked out of your account, please contact us and we can help you.