

Quick Start Guide (Page 1)

Questions? Contact sarasupport@aimsplatform.com

1 What are the Monitoring Dashboards? Who can access them?

The Monitoring Dashboards provide links to all monitoree records in your jurisdiction organized by line lists within workflows. **Public Health** users, **Public Health Enrollers**, **Contact Tracers**, and **Super Users** have access to the monitoring dashboards. The role assigned to each user will determine which buttons are displayed on the dashboard.

2 Where can I find information about my role and permissions?

This information can be found near the top of the screen and is visible to all roles.

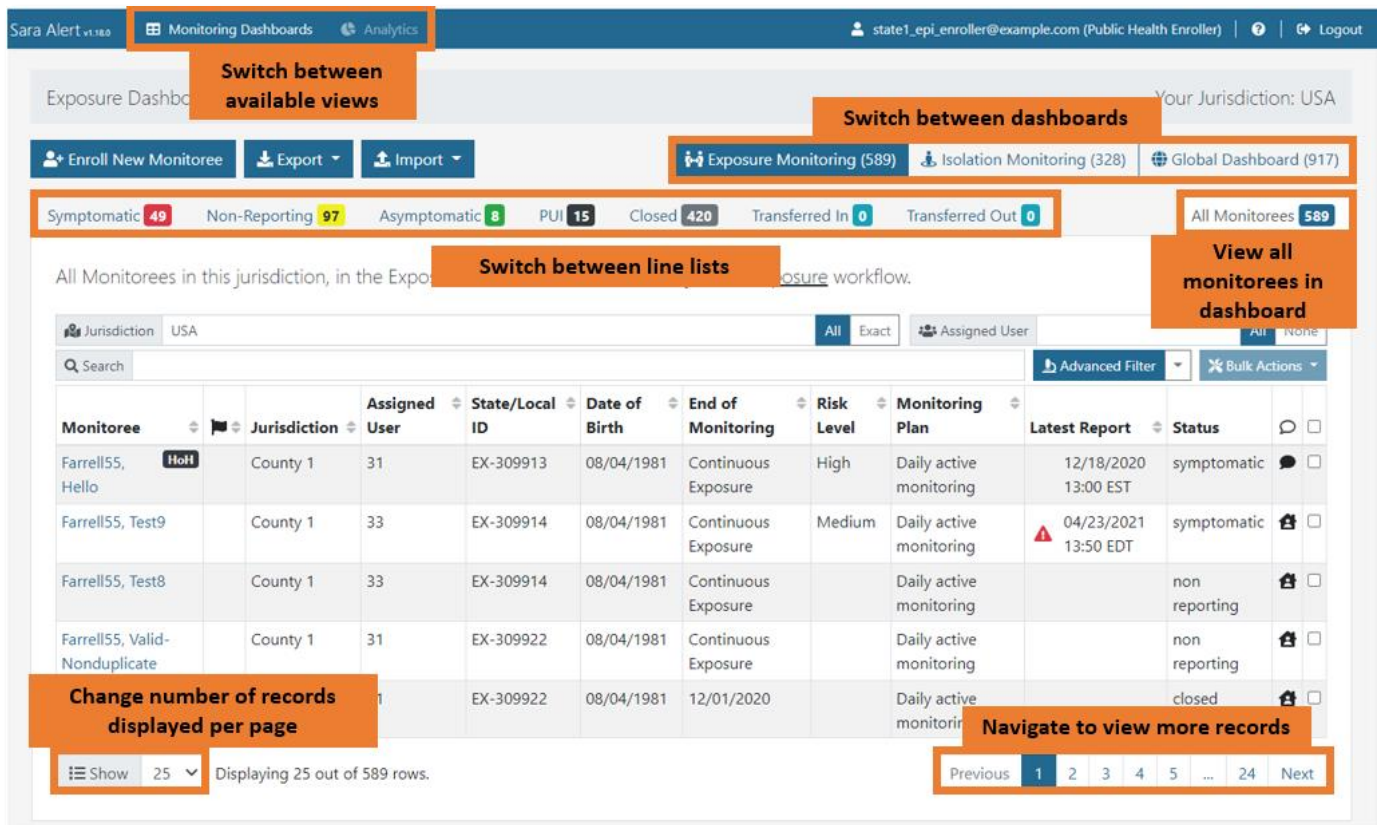


3 Where can I change what the dashboard displays?

Click on the buttons highlighted below to change what information you see on the dashboard. A user may switch views, workflows, and line lists with one click. A user may also select the number of records to display on each line list page.

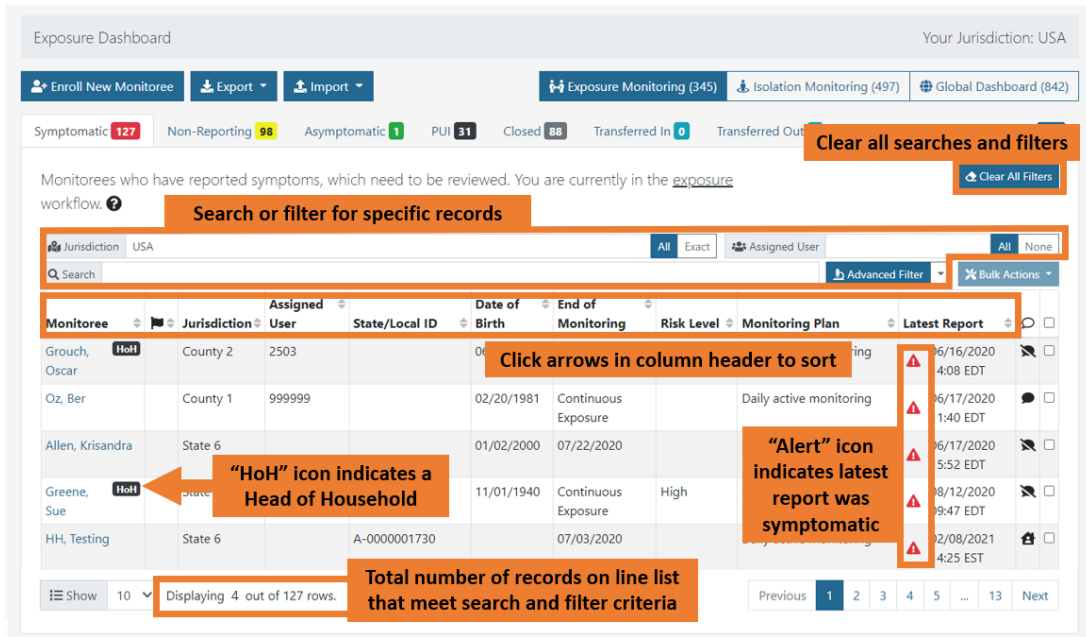
The following views are available depending on role:

- Monitoring Dashboards (Public Health, Public Health Enroller, Contact Tracer, Super User)
- Analytics (Public Health, Public Health Enroller, Super User)
- Admin Panel (Super User)



4 How do I find records of interest?

Use the search box and assigned user and jurisdiction filters on the dashboard to quickly find records. Use the Advanced Filter feature to view records that meet specified criteria. These functions are available to all roles with monitoring dashboard access.



Clear all searches and filters

Search or filter for specific records

Click arrows in column header to sort

"HoH" icon indicates a Head of Household

"Alert" icon indicates latest report was symptomatic

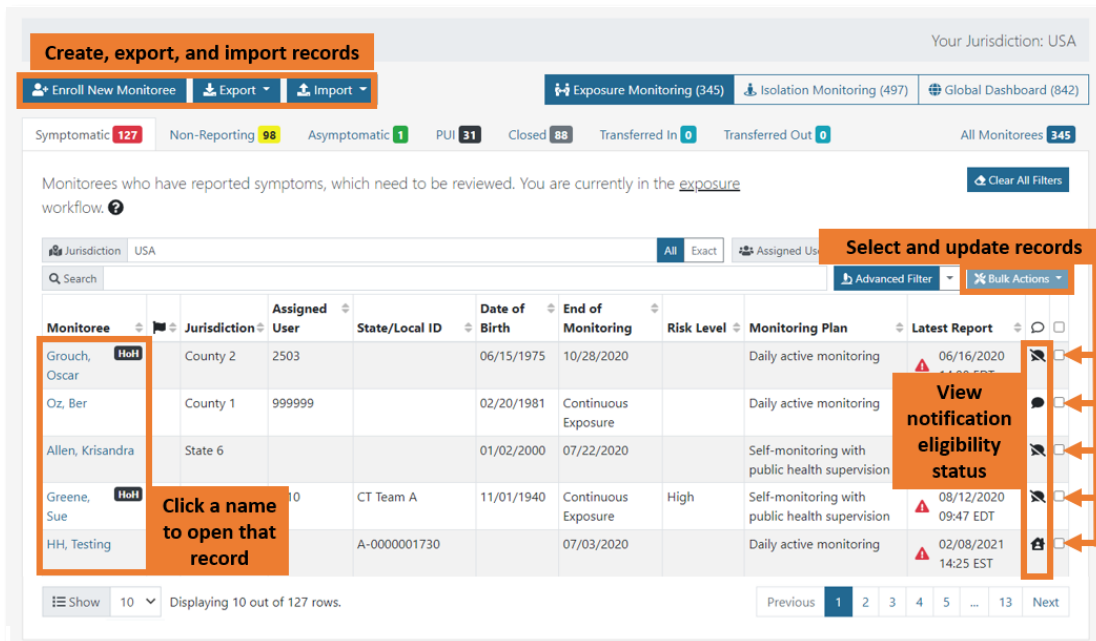
Total number of records on line list that meet search and filter criteria

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	End of Monitoring	Risk Level	Monitoring Plan	Latest Report
Grouch, Oscar	County 2	2503		06/15/1975	10/28/2020		Daily active monitoring	06/16/2020 4:08 EDT
Oz, Ber	County 1	999999		02/20/1981	Continuous Exposure		Daily active monitoring	06/17/2020 1:40 EDT
Allen, Krisandra	State 6			01/02/2000	07/22/2020		Self-monitoring with public health supervision	06/17/2020 5:52 EDT
Greene, Sue	CT Team A	10		11/01/1940	Continuous Exposure	High	Self-monitoring with public health supervision	08/12/2020 09:47 EDT
HH, Testing	State 6		A-0000001730		07/03/2020		Daily active monitoring	02/08/2021 4:25 EST

Showing 4 out of 127 rows.

5 What else can I do from the dashboard?

- Create records using the enrollment wizard (Public Health Enrollers, Contact Tracers and Super Users)
- Export or Import records (Public Health Users, Public Health Enrollers, and Super Users)
- View notification eligibility status (all roles with monitoring dashboard access)
- Select and update multiple records using Bulk Actions (all roles with monitoring dashboard access)
- Open a record to view more details (all roles with monitoring dashboard access)



Create, export, and import records

Select and update records

View notification eligibility status

Click a name to open that record

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	End of Monitoring	Risk Level	Monitoring Plan	Latest Report
Grouch, Oscar	County 2	2503		06/15/1975	10/28/2020		Daily active monitoring	06/16/2020 4:08 EDT
Oz, Ber	County 1	999999		02/20/1981	Continuous Exposure		Daily active monitoring	06/17/2020 1:40 EDT
Allen, Krisandra	State 6			01/02/2000	07/22/2020		Self-monitoring with public health supervision	06/17/2020 5:52 EDT
Greene, Sue	CT Team A	10		11/01/1940	Continuous Exposure	High	Self-monitoring with public health supervision	08/12/2020 09:47 EDT
HH, Testing	State 6		A-0000001730		07/03/2020		Daily active monitoring	02/08/2021 14:25 EST

Showing 10 out of 127 rows.