

# Back to Work Process Management System

**User Guide v1.0**

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# What are the main user roles in this system ?

- **Site Foreman/Supervisor** – Will be responsible for maintaining the Construction site & managing the employees or external contractors employed at sites. Site supervisors will be using the new system to monitor the pre-screened information and attendance of employees, contractors at the site.
- **Employees or Contractors** - Will be required to fill the COVID-19 symptom checking form online each day. Based on the responses given, employee will receive an automated email indicating if they are ACCEPTED or REJECTED to the site. **The form is required to be filled out before 2:59pm each day. Any forms filled out after 3:00pm will be considered as the pre-screen for following day.**

Let's begin: Pre-screening before coming onsite

# What should an Employee or Contractor do before going to the work site each day?

**Step 01** : Every employee or contractor is mandated to submit the COVID-19 Symptoms Analysis form before coming on site.

The form can be accessed at <link>  
Each individual can fill the questionnaire.

**Note:** The form is required to be filled out before 2:59p.m eastern standard time each day. Any forms filled out after 3:00p.m will be considered as the pre-screen for following day.

### Daily COVID-19 Questionnaire

Statement – Due to concerns of COVID-19 and under guidance of the CDC, all employees on Job sites must complete this form DAILY, PRIOR TO REPORTING TO THE JOB SITE. Failure to truthfully answer these questions will result in an indefinite ban from all job sites. There is a zero tolerance policy for sick workers reporting to work. IF YOU ARE SICK, STAY HOME! IF YOU FEEL SICK, GO HOME! IF YOU SEE SOMEONE SICK, REPORT THEM TO YOUR SUPERVISOR.

**\*Required**

Name\* \*

Your answer \_\_\_\_\_

Email\* \*

Your answer \_\_\_\_\_

Are you willing to proceed with this questionnaire?

yes

No

# Based on the answers provided in the questionnaire, the individual will receive an email confirming if they are permitted or not to go into the work site

Dear Brian Scott,

You are APPROVED to report to Walpole, MA  
Please continue to follow all Plumb House COVID-19 protocols including wearing face masks, gloves, and appropriate PPE at all times.  
Please remember that this questionnaire must be completed DAILY, BEFORE YOU REPORT TO THE SITE.  
If you have any questions regarding COVID-19 protocols, or begin to experience any symptoms, please contact your supervisor by phone to discuss.  
Thank you for your help in keeping Walpole, MA safe for everyone!

Thanks

**Sample APPROVED email sent to the employee/contractor**

Dear Brian Scott,

You are NOT APPROVED to report Cambridge, MA  
Please contact your Supervisor BY PHONE or EMAIL to notify them that you have not been cleared by the Plumb House COVID-19 screening to report to work and discuss your next steps.  
We suggest that you contact your health care provider to notify them that you may be experiencing symptoms of COVID-19 or may have come in contact with someone experiencing symptoms of COVID-19 to discuss recommendations.

Thanks

**Sample REJECTED email sent to the employee/contractor**

An easy way for Foreman and Site Supervisors  
to view pre-screened information in the system

**Step 01** : For every filled questionnaire, system will generate a record in the system. These records can be viewed when the site foreman log-in to the system. These records can be accessed by clicking on **Daily Health Screening** on the left panel.

Daily Health Screening

NEW ACTIONS

Filters/folders Tag

Employee	Work Site	Created on	COVID Employer Status	WorkonSite
Lakshitha Herath	Watertown, MA	5/5/2020 3:08 AM	REJECTED	Countertops
James Smith	Quincy, MA	5/5/2020 4:01 AM	REJECTED	Design Team
Ayesha Ansar	Weymouth, MA	5/5/2020 5:19 AM	REJECTED	Electrical
Timothy Mccready	Weymouth, MA	5/5/2020 2:52 PM	APPROVED	Design
Youlanda Mcwhorter	Weymouth, MA	5/5/2020 5:15 AM	REJECTED	Electricals
Stewart Crispin	Walpole, MA	5/5/2020 2:46 AM	APPROVED	Electrical
Stasia Henrickson	Watertown, MA	5/5/2020 1:55 AM	REJECTED	Electrical
Winter Hodge	Watertown, MA	5/5/2020 3:08 AM	REJECTED	Fire Protection
Lakshitha Herath	Weymouth, MA	5/5/2020 3:12 AM	APPROVED	Fire Protection
Wilbur Breshears	Watertown, MA	5/5/2020 2:40 PM	APPROVED	Inspections
Sol Sasson	Weymouth, MA	5/5/2020 2:50 PM	APPROVED	Design
Thilina Herath	Quincy, MA	5/5/2020 12:08 AM	REJECTED	Gypcrete

**Step 02** : As shown below, Site foreman can open each entry to see detail symptoms indicated in the questionnaire.

The screenshot displays a web application interface for 'Daily Health Screening'. On the left is a navigation sidebar with options: Health and Safety, Contacts, Accounts, and Daily Health Screening (selected). The main content area shows a table of screening records. A search bar at the top right contains the text 'What can I do for you?'. A 'NEW' button and an 'ACTIONS' dropdown are visible above the table. The table has columns: Employee, Work Site, Created on, COVID Employer Status, and WorkonSite. The entry for James Smith is highlighted, and its 'OPEN' button is circled in red. Below the table are 'COPY' and 'DELETE' buttons. A vertical toolbar on the right side contains icons for a phone, email, chat, and notifications (with a '13' badge).

Employee	Work Site	Created on	COVID Employer Status	WorkonSite
Lakshitha Herath		5/6/2020 7:36 AM	OPEN	
Lakshitha Herath	Watertown, MA	5/5/2020 3:08 AM	REJECTED	Countertops
James Smith	Quincy, MA	5/5/2020 4:01 AM	REJECTED	Design Team
Ayesha Ansar	Weymouth, MA	5/5/2020 5:19 AM	REJECTED	Electrical
Timothy Mccready	Weymouth, MA	5/5/2020 2:52 PM	APPROVED	Design
Youlanda Mcwhorter	Weymouth, MA	5/5/2020 5:15 AM	REJECTED	Electricals
Lakshitha Herath		5/6/2020 8:47 AM	OPEN	
Stewart Crispin	Walpole, MA	5/5/2020 2:46 AM	APPROVED	Electrical
Stasia Henrickson	Watertown, MA	5/5/2020 1:55 AM	REJECTED	Electrical
Winter Hodge	Watertown, MA	5/5/2020 3:08 AM	REJECTED	Fire Protection
Lakshitha Herath		5/6/2020 7:19 AM	REJECTED	
Lakshitha Herath	Weymouth, MA	5/5/2020 3:12 AM	APPROVED	Fire Protection
Lakshitha Herath		5/6/2020 8:48 AM	SCREENED	

**Step 03 :** If employee has indicated that they are “COVID-19 positive”, having “temperature over 100.3” or having “worked in a site with COVID-19 traces”, the system will send automated emails to employee informing not to report to work/site. System also sends an email notification to HR team on the rejection.

The individual also has a “REJECTED” status in the system as shown below.

- ❓ **An email will be sent to employee indicating he/she is not approved to report to work..**
- ❓ **Another email will be sent to HR indicating the employee is not approved to attend to work as the employee is at a risk of COVID- 19 traces**

The screenshot shows a mobile application interface for "Daily Health Screening". The left sidebar contains navigation options: "Health and Safety", "Contacts", "Accounts", and "Daily Health Screening". The main content area displays a form for "Daily Health Screening" for "James Smith". The "COVID Employer Status" is highlighted in a red box and shows "REJECTED". Below this, there are sections for "SYMPTOM ASSESSMENT HISTORY" and "FOREMAN CHECK OFF" with various checkboxes for symptoms like "COVID19 Symptoms", "COVID Temperature above 100.3", and "SoreThroat".

Dear HR Team,

This is to inform you that, Graycia Simon is not approved to report Cambridge, MA as the employee seems at a risk Covid 19.

We have advised the employee to contact his Supervisor BY PHONE or EMAIL to notify them that he has not been cleared by the Plumb House COVID-19 screening to report to work and discuss his next steps.

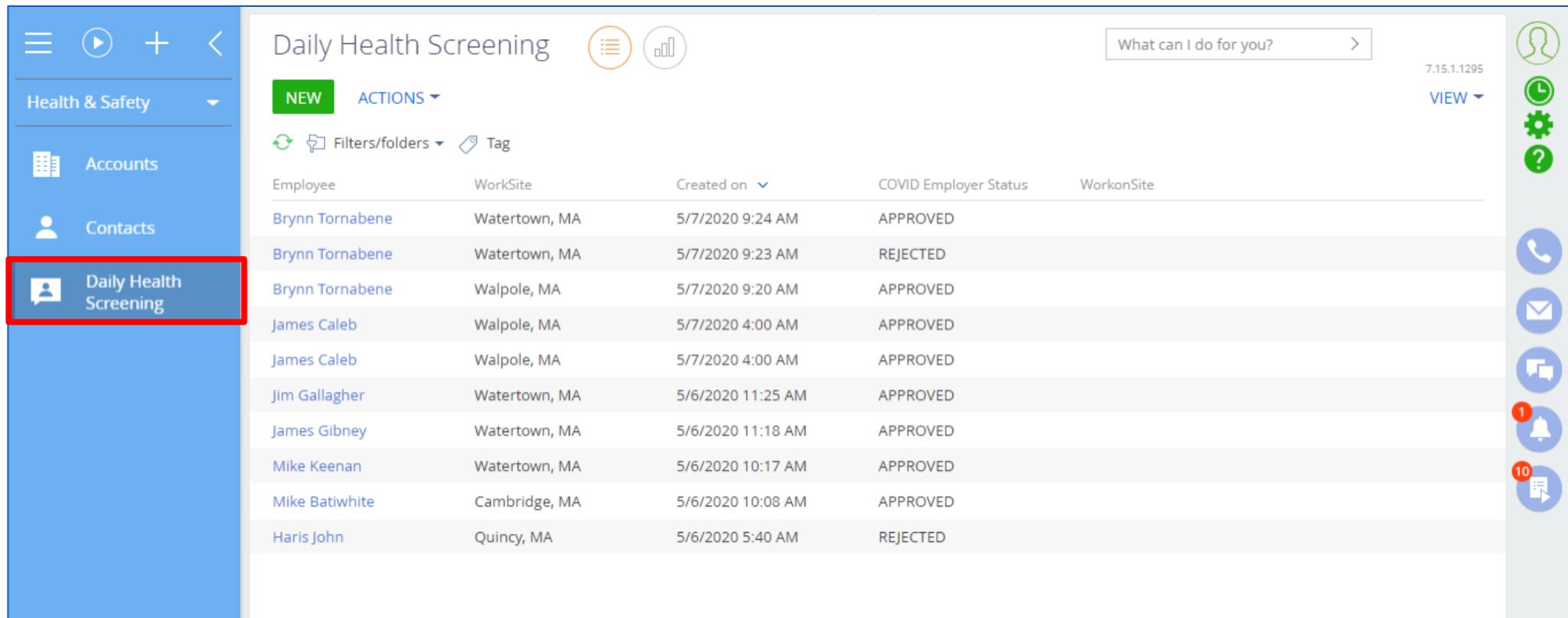
Thanks  
Plumb House Inc.

Updating employee records while at the work site

# How does a site foreman update entry records?

If the employee is APPROVED to work and yet does not turn up at the site, supervisor has an option to mark the individual as “no show at work”

**Step 01** : Select **Daily Health Screening** on the left menu



The screenshot displays the 'Daily Health Screening' interface. On the left, a blue sidebar menu contains the following items: 'Health & Safety', 'Accounts', 'Contacts', and 'Daily Health Screening' (highlighted with a red box). The main content area shows a table of screening records with the following columns: Employee, WorkSite, Created on, COVID Employer Status, and WorkonSite. The table contains 12 rows of data. At the top right, there is a search bar with the text 'What can I do for you?' and a 'VIEW' dropdown menu. The version number '7.15.1.1295' is also visible.

Employee	WorkSite	Created on	COVID Employer Status	WorkonSite
Brynn Tornabene	Watertown, MA	5/7/2020 9:24 AM	APPROVED	
Brynn Tornabene	Watertown, MA	5/7/2020 9:23 AM	REJECTED	
Brynn Tornabene	Walpole, MA	5/7/2020 9:20 AM	APPROVED	
James Caleb	Walpole, MA	5/7/2020 4:00 AM	APPROVED	
James Caleb	Walpole, MA	5/7/2020 4:00 AM	APPROVED	
Jim Gallagher	Watertown, MA	5/6/2020 11:25 AM	APPROVED	
James Gibney	Watertown, MA	5/6/2020 11:18 AM	APPROVED	
Mike Keenan	Watertown, MA	5/6/2020 10:17 AM	APPROVED	
Mike Batiwhite	Cambridge, MA	5/6/2020 10:08 AM	APPROVED	
Haris John	Quincy, MA	5/6/2020 5:40 AM	REJECTED	

**Step 02** : Select the employee record as indicated below and click **OPEN** button.

The screenshot displays a web application interface for 'Daily Health Screening'. The left sidebar is blue and contains navigation options: 'Accounts', 'Contacts', and 'Daily Health Screening' (which is currently selected). The main content area has a white background with a blue header. The header includes a search bar with the text 'What can I do for you?' and a 'VIEW' button. Below the header, there are several icons and a 'NEW' button. The main area contains a table of employee records. The table has the following columns: 'Employee', 'WorkSite', 'Created on', 'COVID Employer Status', and 'WorkonSite'. The record for 'James Caleb' is highlighted in blue, and the 'OPEN' button below it is circled in red. The table also includes 'COPY' and 'DELETE' buttons for each record.

Employee	WorkSite	Created on	COVID Employer Status	WorkonSite
Brynn Tornabene	Watertown, MA	5/7/2020 9:24 AM	APPROVED	
Brynn Tornabene	Watertown, MA	5/7/2020 9:23 AM	REJECTED	
Brynn Tornabene	Walpole, MA	5/7/2020 9:20 AM	APPROVED	
James Caleb	Walpole, MA	5/7/2020 4:00 AM	APPROVED	
James Caleb	Walpole, MA	5/7/2020 4:00 AM	APPROVED	
Jim Gallagher	Watertown, MA	5/6/2020 11:25 AM	APPROVED	
James Gibney	Watertown, MA	5/6/2020 11:18 AM	APPROVED	
Mike Keenan	Watertown, MA	5/6/2020 10:17 AM	APPROVED	
Mike Batiwhite	Cambridge, MA	5/6/2020 10:08 AM	APPROVED	
Haris John	Quincy, MA	5/6/2020 5:40 AM	REJECTED	

**Step 03 :** Click **No Show at Work** checkbox and click the **SAVE** button to save the record.

The screenshot shows the 'Daily Health Screening' interface. At the top, there is a navigation bar with a 'SAVE' button highlighted in red. Below the navigation bar, the form displays the following information:

- Employee\*: James Caleb
- COVID Assessment Date\*: 5/7/2020
- No Show at Work:  (highlighted in red)
- Screen Temperature over 100.3:

The form also includes a 'SYMPTOM ASSESSMENT HISTORY' section with the following questions and checkboxes:

- COVID19 Symptoms
  - Are you willing to proceed with this questionnaire?
  - Have you tested positive for COVID-19?
- Select any symptoms which you may be experiencing
  - COVIDTemp
  - Sore throat
  - A persistent cough
  - I am not experiencing any of these symptoms

If the employee has been screened at the work site with body temperature over 100.3 degrees, the supervisor can indicate the same in this screen

**Step 04 :** Click **Screen Temperature over 100.3** checkbox and click **SAVE** button to save the record.

The screenshot displays the 'Daily Health Screening' interface for an employee named James Caleb. The interface includes a navigation menu on the left with options like 'Accounts', 'Contacts', and 'Daily Health Screening'. The main form area shows the following details:

- Employee\*:** James Caleb
- COVID Assessment Date\*:** 5/7/2020
- No Show at Work:**
- Screen Temperature over 100.3:**  (highlighted with a red box)

At the top of the form, there are buttons for 'SAVE' (highlighted with a red box), 'CANCEL', and 'ACTIONS'. A progress bar at the top right shows the status: OPEN > SCREENED > APPROVED. Below this, there is a section for 'NEXT STEPS (0)' with icons for phone, email, chat, and SMS. A message states: 'You don't have any tasks yet. Press [flag icon] above to add a task.' The bottom section is titled 'SYMPTOM ASSESSMENT HISTORY' and contains the following questions:

- COVID19 Symptoms:**
  - Are you willing to proceed with this questionnaire?
  - Have you tested positive for COVID-19?
- Select any symptoms which you may be experiencing:**
  - COVIDTemp
  - Sore throat
  - A persistent cough
  - I am not experiencing any of these symptoms

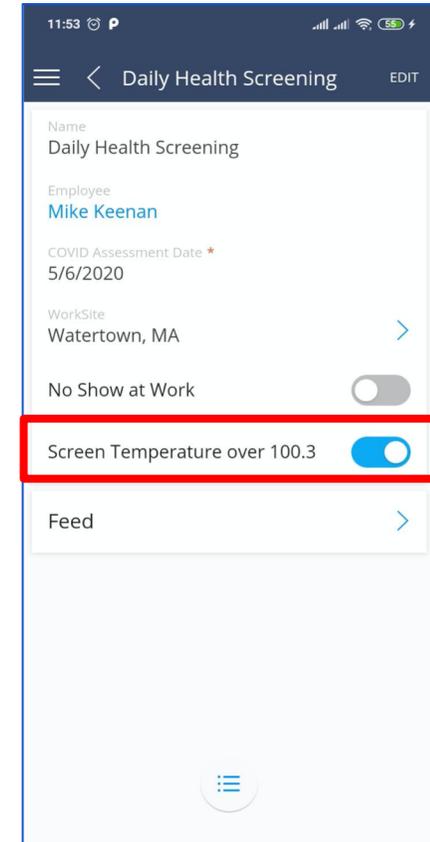
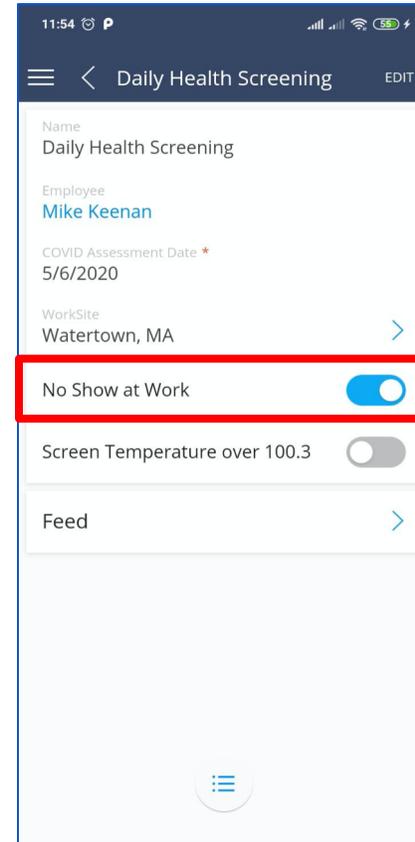
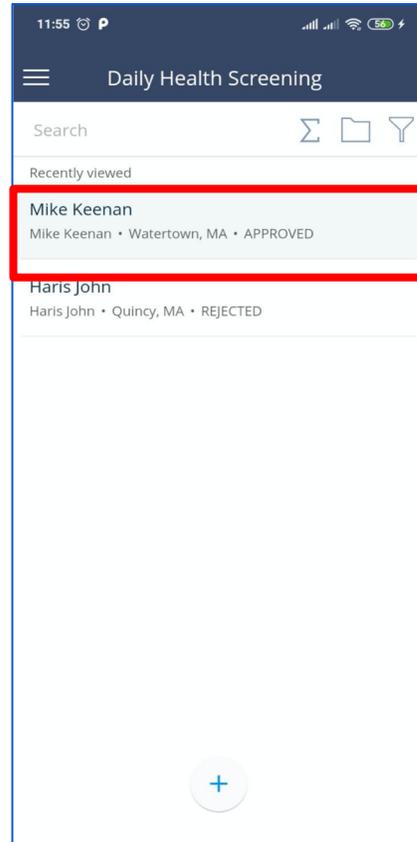
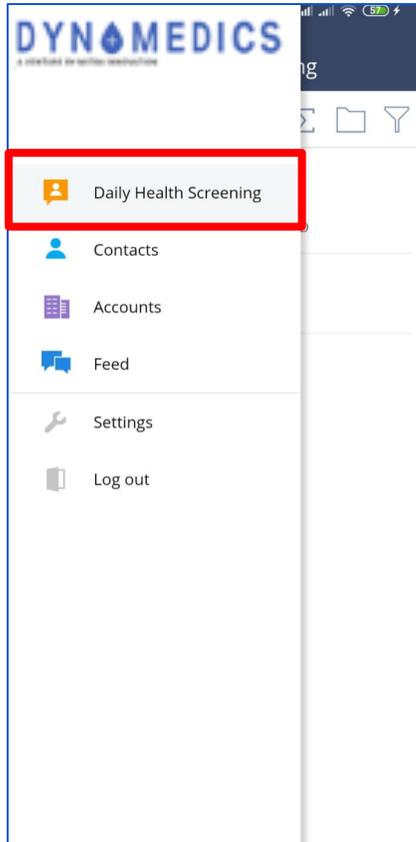
The same flow is available on your mobile as well

**Step 01 :** Click on **Daily Health Screening** tab on the left menu.

**Step 02 :** Touch on the employee record to open the detail view.

**Step 03 :** If someone was approved but didn't show up for work, toggle **No Show at Work** button.

**Step 04 :** If someone had a temperature at the work site, toggle **Screen Temperature over 100.3** button.



**You can download the mobile apps from :**

IOS

: <https://apps.apple.com/lk/app/mobile-creatio/id708432450>

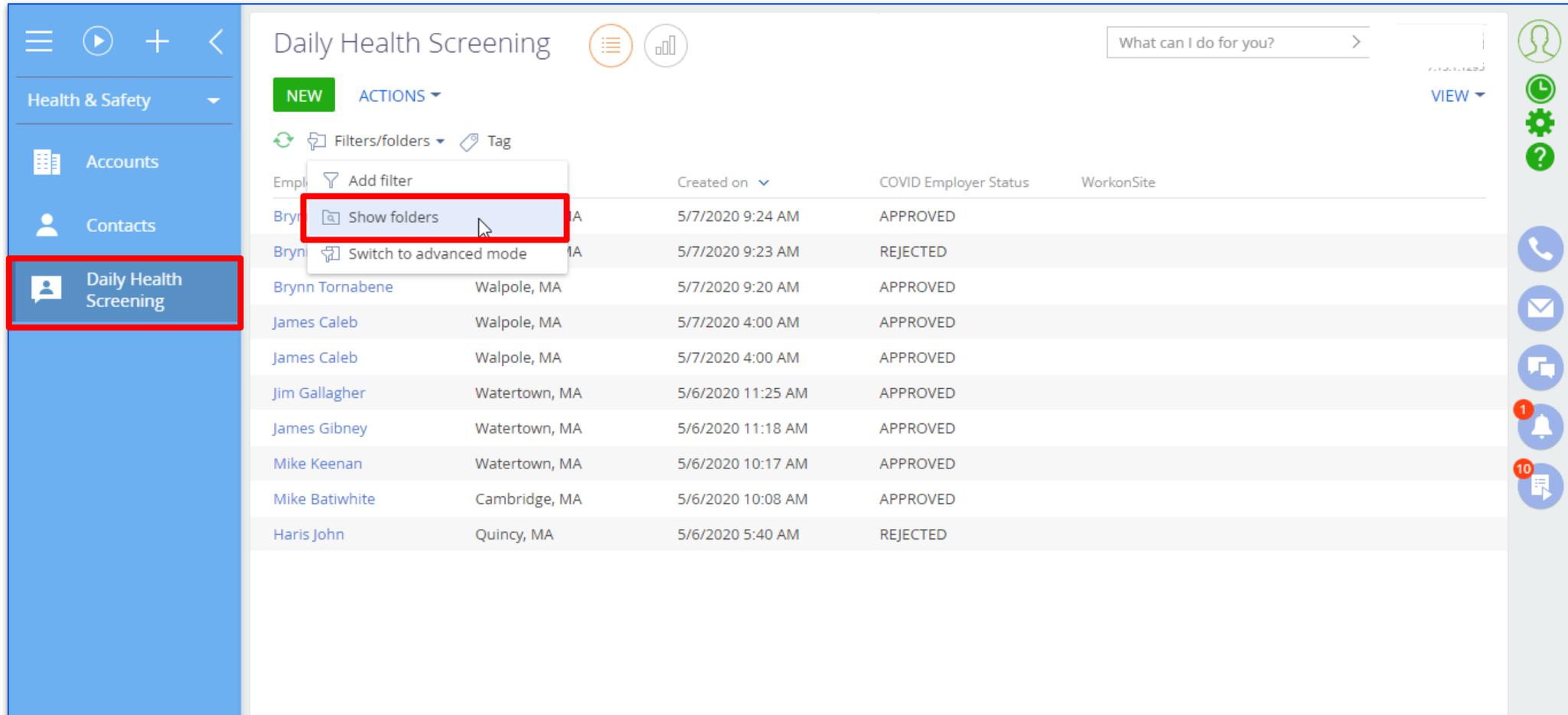
Android

: [https://play.google.com/store/apps/details?id=com.creatio.mobileapp&hl=en\\_US](https://play.google.com/store/apps/details?id=com.creatio.mobileapp&hl=en_US)

Easy filters to identify those who are approved to come to the site

# How to find approved employees?

**Step 01** : Navigate to **Daily Health Screening** tab and click on the **Filters/Folders** dropdown and select **Show folders** option.



The screenshot displays the 'Daily Health Screening' interface. On the left, a navigation sidebar is visible with the 'Daily Health Screening' tab highlighted in a red box. The main content area shows a table of screening records. A dropdown menu is open under the 'Filters/folders' header, with the 'Show folders' option highlighted in a red box. The table contains the following data:

Empl	Created on	COVID Employer Status	WorkonSite
Bryn	5/7/2020 9:24 AM	APPROVED	
Bryn	5/7/2020 9:23 AM	REJECTED	
Brynn Tornabene	5/7/2020 9:20 AM	APPROVED	Walpole, MA
James Caleb	5/7/2020 4:00 AM	APPROVED	Walpole, MA
James Caleb	5/7/2020 4:00 AM	APPROVED	Walpole, MA
Jim Gallagher	5/6/2020 11:25 AM	APPROVED	Watertown, MA
James Gibney	5/6/2020 11:18 AM	APPROVED	Watertown, MA
Mike Keenan	5/6/2020 10:17 AM	APPROVED	Watertown, MA
Mike Batiwhite	5/6/2020 10:08 AM	APPROVED	Cambridge, MA
Haris John	5/6/2020 5:40 AM	REJECTED	Quincy, MA

**Step 02 :** There on the left side panel you can see folders where the approved employees are sorted out according to their current working site.

The screenshot shows the 'Daily Health Screening' application interface. On the left, a navigation sidebar includes 'Health & Safety', 'Accounts', 'Contacts', and 'Daily Health Screening'. The main content area features a 'NEW FOLDER' button and a 'NEW' button. A 'Filters/folders' dropdown menu is open, listing various categories such as 'Approved to work on all site', 'Approved to work on Quincy, MA', 'Approved to work on Walpole, MA', 'Approved to work on Watertown, MA' (highlighted with a red box), 'Approved to work on Weymouth, MA', 'Approved to work on Cambridge, MA', 'Archive', and 'Rejected to work on all site'. Below the filters, a table displays a record for 'Brynn Tornabene' at 'Watertown, MA' with a 'Created on' date of '5/7/2020 9:24 AM' and a 'COVID Employer St...' status of 'APPROVED'. The right sidebar contains a search bar and several utility icons.

Employee	WorkSite	Created on	COVID Employer St...	WorkonSite
Brynn Tornabene	Watertown, MA	5/7/2020 9:24 AM	APPROVED	

Your daily dashboard

# How does a manager view the dashboard?

**Step 01** : Select **Management & Admin** tab from the dropdown.

**Step 02** : Navigate to **Dashboard** tab and there you can see daily records in a graphical manner.

The screenshot displays a software dashboard with a blue sidebar on the left and a main content area. The sidebar contains navigation options: 'Management & Admin' (highlighted with a red box), 'Dashboards' (highlighted with a red box), 'Daily Health Screening', 'Accounts', and 'Contacts'. The main content area is titled 'Dashboards' and shows a search bar with the text 'What can I do for you?'. Below the search bar, there is a breadcrumb trail: '< DAILY ATTENDANCE REPORT - TODAY'. The primary data visualization is a table titled 'Daily Site Attendance' with the following columns: Employee, Employer Status, Created on, Working Site, and Work on Site. The table contains six rows of data. Below the table, there is a 'Show more' link. At the bottom of the dashboard, there are two summary cards. The first card, 'Employees at Risk', features a gauge chart with a green center containing the number '5', and a semi-circular arc with '15' on the left and '25' on the right. The second card, 'Cleared For Work', displays the number '5'.

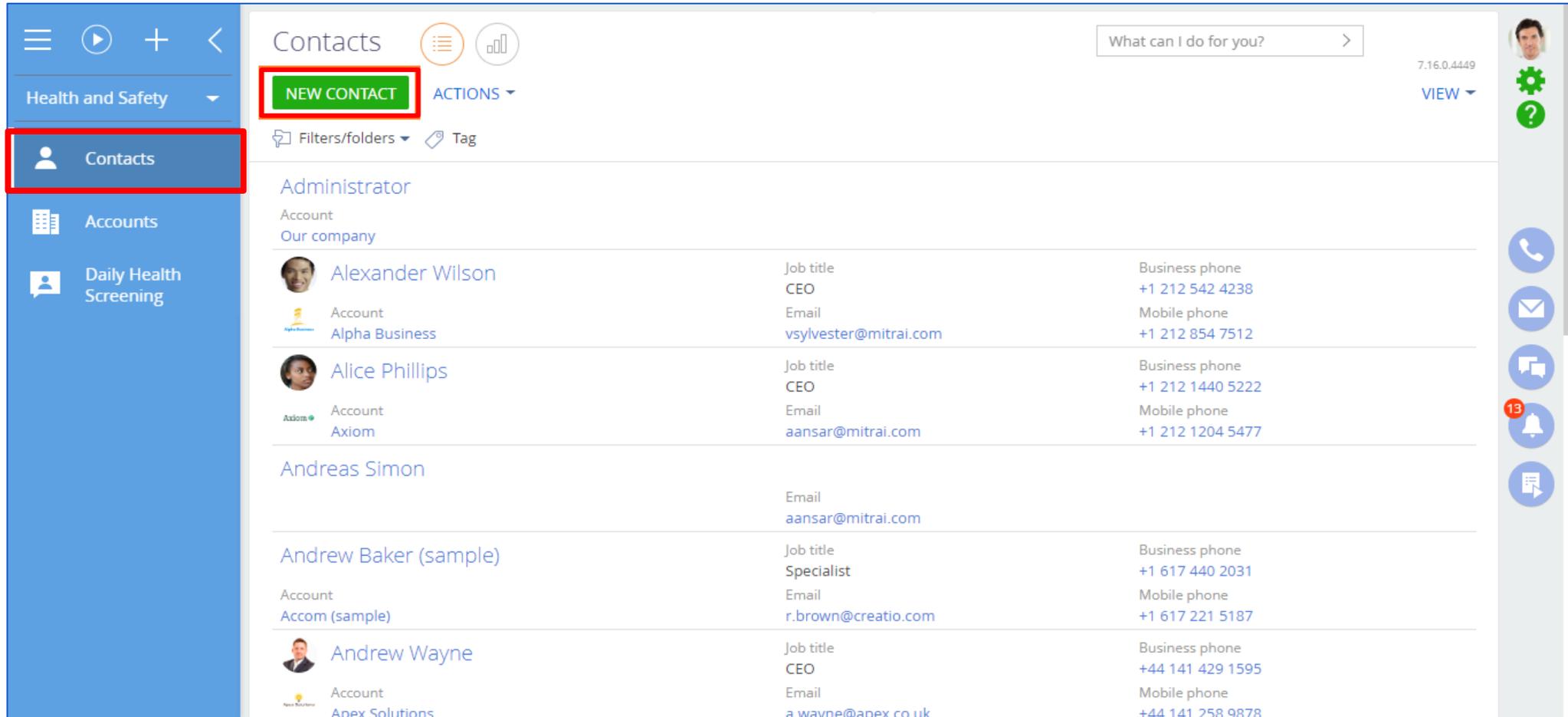
Employee	Employer Status	Created on	Working Site	Work on Site
Lakshitha Herath	REJECTED	5/7/2020 11:46 AM	Cambridge, MA	
Lakshitha Herath	APPROVED	5/7/2020 11:43 AM	Walpole, MA	
Lakshitha Herath	REJECTED	5/7/2020 11:42 AM	Watertown, MA	Window/Paper/Doors
Brynn Tornabene	APPROVED	5/7/2020 9:24 AM	Watertown, MA	
Brynn Tornabene	REJECTED	5/7/2020 9:23 AM	Watertown, MA	

# Adding a new Site Supervisor

# How to add a new Site Supervisor?

Site foreman or a manager can add a new Site Supervisor to the system.

**Step 01** : Navigate to **Contact** tab and click on the **New Contact** button.



The screenshot displays the 'Contacts' page of a mobile application. The left sidebar contains navigation options: 'Health and Safety', 'Contacts' (highlighted with a red box), 'Accounts', and 'Daily Health Screening'. The main content area is titled 'Contacts' and features a green 'NEW CONTACT' button (highlighted with a red box) and an 'ACTIONS' dropdown menu. Below this, there are filters and tags. The contact list includes:

- Administrator**
  - Account: Our company
  - Alexander Wilson** (CEO) - Business phone: +1 212 542 4238, Mobile phone: +1 212 854 7512, Email: vsylvester@mitrai.com
  - Alice Phillips** (CEO) - Business phone: +1 212 1440 5222, Mobile phone: +1 212 1204 5477, Email: aansar@mitrai.com
  - Andreas Simon** - Email: aansar@mitrai.com
  - Andrew Baker (sample)** (Specialist) - Business phone: +1 617 440 2031, Mobile phone: +1 617 221 5187, Email: r.brown@creatio.com
  - Andrew Wayne** (CEO) - Business phone: +44 141 429 1595, Mobile phone: +44 141 258 9878, Email: a.wayne@apex.co.uk

**Step 02:** Fill the details and click the **SAVE** button.

The screenshot shows a contact management application interface. A modal window titled "Contact" is open in the center, containing several input fields: "Full name\*" (with a red asterisk and a blue "Enter a value" placeholder), "Account", "Full job title", "Department", "Mobile phone", and "Email". At the bottom of the modal, there are two buttons: "SAVE" (highlighted with a red box) and "CANCEL".

The background interface includes a left sidebar with navigation options: "Health and Safety", "Contacts", "Accounts", and "Daily Health Screening". The main area displays a list of contacts, including "Administrator", "Alexander Wilson", "Alice Phillips", "Andreas Simon", "Andrew Baker (sample)", and "Andrew Wayne". The right sidebar contains a search bar, a user profile, and various utility icons like a phone, email, and notification bell.

**Step 03:** Select system designer option from left panel or settings icon [⚙️] on the top right corner as shown below. Then Click **System users**.

The screenshot displays the Plumb House software interface. On the left, a blue navigation sidebar contains the following items: 'Health and Safety' (with a dropdown arrow), 'Contacts', 'Accounts', and 'Daily Health Screening'. The main content area is titled 'Plumb House' and shows version '7.16.0.4449'. It is divided into three main sections: 'Processes' (with a green play icon), 'Users and administration' (with a red person icon), and 'Portal setup' (with a blue person icon). The 'Users and administration' section is expanded, and the 'System users' option is highlighted with a red rectangular box. Other options in this section include 'Process library', 'Process log', 'Organizational roles', 'Functional roles', 'Object permissions', 'Operation permissions', 'Audit log', 'Change log', 'External access', and 'License manager'. The 'Portal setup' section includes 'Portal users'. On the right side of the interface, there is a search bar with the text 'What can I do for you?' and a settings icon (a green gear) highlighted with a red square. Below the search bar is a user profile picture. A vertical toolbar on the far right contains icons for phone, email, chat, notifications (with a red '13' badge), and a help icon. A large orange banner on the right side of the main content area reads 'Bpm'online is now Creatio' and includes a 'LEARN MORE' button and several navigation icons. Below the banner, there are links for 'Developer's guide to Creatio platform', 'Lightning fast implementation', 'Getting started', 'Tutorials, Trainings, Testing', and 'Academy'.

**Step 04:** Then select **New** and then Select **Company employee** option.

The screenshot shows a user management interface. On the left is a blue sidebar with navigation options: 'Health and Safety', 'Contacts', 'Accounts', and 'Daily Health Screening'. The main area is titled 'Users' and contains a table of user records. At the top of the main area, there is a 'NEW' button (highlighted with a red box) and an 'ACTIONS' dropdown menu. The 'NEW' button has opened a dropdown menu with two options: 'Portal user' and 'Company employee' (highlighted with a red box). The table below has columns for 'Active', 'Job title', 'Business phone', and 'Name'. The table contains several rows of user data, including 'SSPRegPortalUser', 'Administrator', 'a.wilson@alphabusiness.com', 'Alice Phillips', 'Portal user 1', 'Caleb Jones', 'Mandrill', 'James Gibney', 'Jim Tornabene', 'j.anderson@yahoo.com', 'Mary King', 'Megan Lewis', 'Mike Keenan', 'Peter Moore', and 'Bob Denton'.

Active	Job title	Business phone	Name
Yes			SSPRegPortalUser
Yes			Administrator
Yes	CEO	+1 212 542 4238	Alexander Wilson
Yes	CEO	+1 212 1440 5222	Alice Phillips
Yes	CEO	+44 141 429 1595	Andrew Wayne
Yes	CEO	3010	Caleb Jones
Yes			Mandrill
Yes			James Gibney
Yes			Jim Tornabene
Yes	Head of department	+44 (15) 1542 4245	Jordan Anderson
Yes	Sales manager	3020	Mary King
Yes	Sales manager	3070	Megan Lewis
Yes			Mike Keenan
Yes	Head of department	3040	Peter Moore
Yes			Bob Denton

**Step 05:** You can select the contact you save in step 01 and click the **SAVE** button.

New record

What can I do for you? >

**SAVE** CANCEL DELETE

Contact\*

Culture\* en-US

Type\* Company employee

Home page

Active

Date and time format

< GENERAL INFORMATION ROLES LICENSES RIGHTS DELEGATION ACCESS RULES >

Authentication

Creatio authentication  LDAP authentication

Username\*

Password\*

Password confirmation\*

Password expiration date

Reset password

If you need any further assistance you can reach out to us through:

[dynamedicssupport@mitrai.com](mailto:dynamedicssupport@mitrai.com)