HIETexas PULSE

PULSE ENTERPRISE

# ADMINISTRATOR USER GUIDE

AUDACIOUS INQUIRY | BOLD SOLUTIONS FOR CONNECTED HEALTHCARE

## Welcome to Audacious Inquiry's PULSE Enterprise!

PULSE Enterprise is a cloud-based software solution built for public health and emergency management authorities and other organizations that solve critical gaps in patient care during public health emergencies and disasters.

PULSE Enterprise enables authorized users to access medication and clinical histories to improve direct patient care for individuals in non-routine care settings, such as shelters, medical surge sites,and other alternate care facilities. It can also be used to support public health activities, including epidemiological assessments, contact tracing, and clinical case augmentation.

Unlike patient care technologies solely focused on routine care, PULSE Enterprise is optimized for the unique demands of field conditions to reduce the burden on providers, support high quality care for patients, and accelerate the return to routine care. Verified health care personnel are granted secure access to patient health information through a simple and easy-to-use web portal, allowing them to find and view electronic patient health and medication histories from across national health information exchange networks.

## Who will use this Guide?

As an Administrator of PULSE Enterprise, you have access to several management functions that can be used to customize and configure your system without assistance. This guide provides step-by-step instructions for these functions, including how to:

- Navigate the Administrator Dashboard
- Manage Events, Organizations, Facilities, Sources, and User accounts
- Request technical support from the Ai Service Desk (see the Service Desk User Guide).

Your specific administrative permissions will be determined by the type of Administrator account you have been given. There are currently five categories of Administrators and their associated administrative permissions are described below:

### *Administrator Roles*

**Tenant Administrator:** this role can create and manage Events during an emergency, configure PULSE Enterprise using the Administrator Dashboard, retrieve reports, and perform User, Organization, Facility, and Source Management functions for all Organizations.

**Event Administrator:** this role can create and manage Events during an emergency for all Organizations.

**Organization Administrator:** this role can manage Events during an emergency and manage Users and Facilities/Locations within their own Organization, create new subordinate Organizations, and manage the Users and Facilities/Locations in those Organizations.

**Organization Manager:** this role can manage Users and Facilities/Locations within their own Organization.

**Auditor:** this role can generate Reports for user activity at a global level within the system.

### *Other Important User Roles*

**PULSE User:** this role can access the Patient Search portal to query for and view clinical documents and medication fill history for patients during a declared emergency.

**Intake Coordinator:** this role can access the Check-In and Check-Out screens to register individuals who have arrived at an alternate care facility and discharge them upon their departure.

**Executive Sponsor:** this role has the legal authority over system implementation in your state or jurisdiction.

Please refer to Appendix C of this guide to learn more about each role and allowable permissions in the system.

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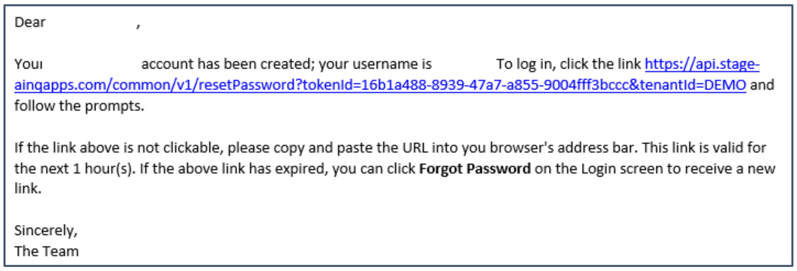
# ACCESS TO PULSE ENTERPRISE

## First Time Login

To access PULSE Enterprise, an Administrator must create a user account for you that is associated to an active Organization. During onboarding, your ExecutiveSponsor will identify at least one Administrator and Ai will provision user credentials for that user(s). Administrators are then able to create accounts for other Administrators, PULSE Users, and Intake Coordinators.

1. Once your account has been created, you will receive an email notification. Within the email, select the hyperlink provided.



Dear ,

You account has been created; your username is To log in, click the link https://api.stage-ainqapps.com/common/v1/resetPassword?tokenId=16b1a488-8939-47a7-a855-9004fff3bccc&tenantId=DEMO and follow the prompts.

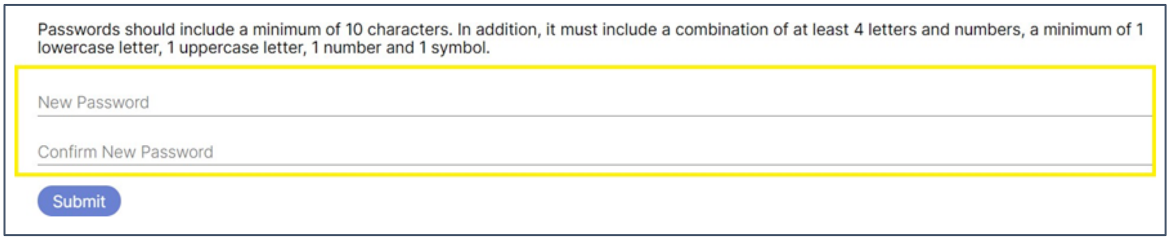
If the link above is not clickable, please copy and paste the URL into you browser's address bar. This link is valid for the next 1 hour(s). If the above link has expired, you can click **Forgot Password** on the Login screen to receive a new link.

Sincerely,
The Team

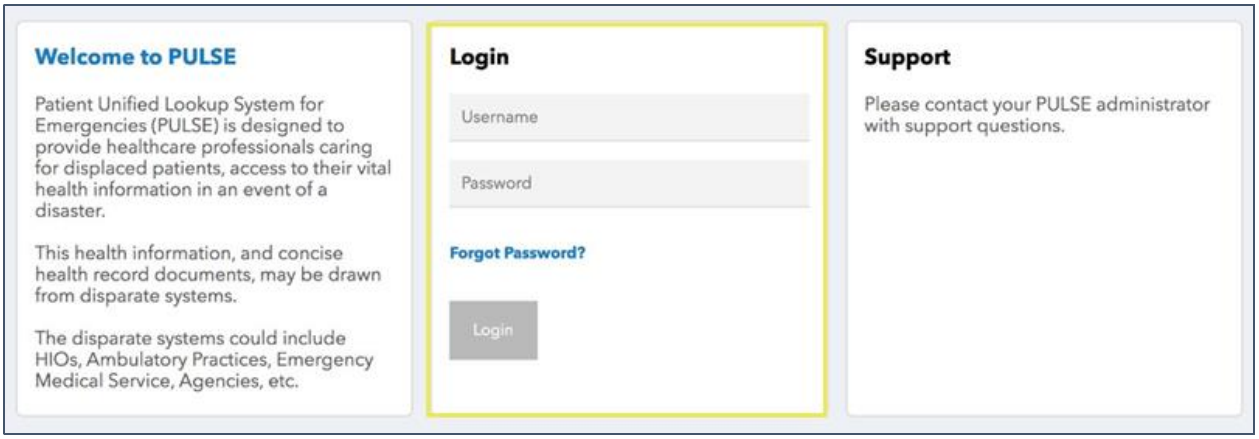
**Tip!** Make sure that the system email address **no-reply@ ainqapps.com** will populate to your inbox, so that emails do not end up in your junk/spam folder.

**Note:** The link is only valid for an hour. If the link expires, follow the Password Reset process.

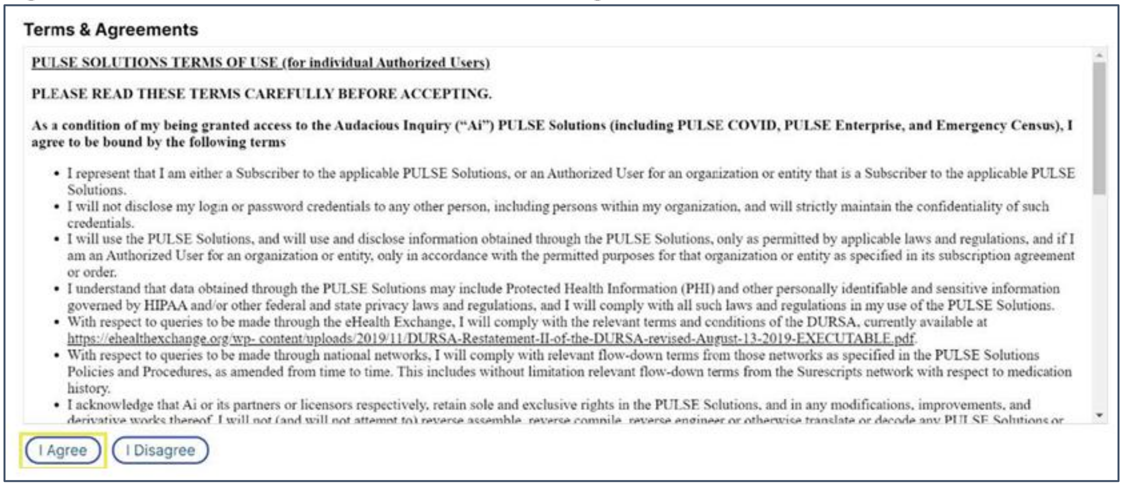
2. Create a password, noting password requirements:
*Passwords must contain a minimum of 10 character(s), 1 number(s), 1 lowercase letter(s), 1 uppercase letter(s), and 1 symbol(s).*



3. Once you have successfully created your password, you will be directed to the PULSE login page. Enter your username and new password where indicated. When finished, select “Login”.




4. You will then be directed to the PULSE Solutions Terms of Use, as shown below. Please read the Terms of Use for information regarding the legal uses of PULSE Enterprise (also available in Appendix A). To navigate to the next page, select the “I Agree” button at the bottom of the page.


Terms & Agreements

PULSE SOLUTIONS TERMS OF USE (for individual Authorized Users)

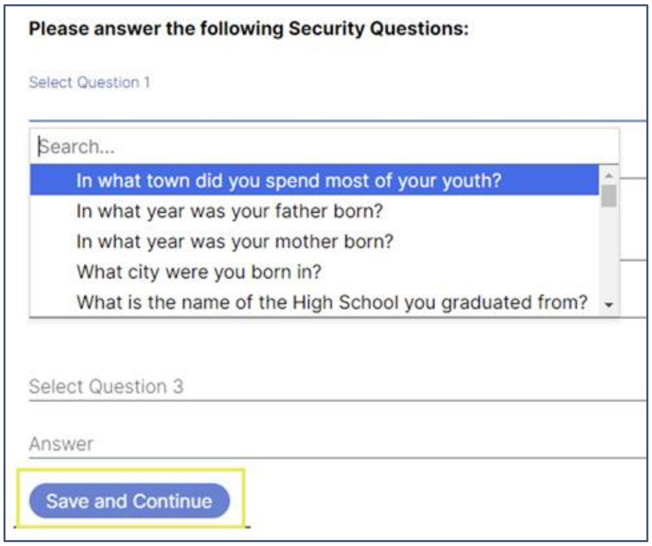
PLEASE READ THESE TERMS CAREFULLY BEFORE ACCEPTING.

As a condition of my being granted access to the Audacious Inquiry (“Ai”) PULSE Solutions (including PULSE COVID, PULSE Enterprise, and Emergency Census), I agree to be bound by the following terms

- I represent that I am either a Subscriber to the applicable PULSE Solutions, or an Authorized User for an organization or entity that is a Subscriber to the applicable PULSE Solutions.
- I will not disclose my login or password credentials to any other person, including persons within my organization, and will strictly maintain the confidentiality of such credentials.
- I will use the PULSE Solutions, and will use and disclose information obtained through the PULSE Solutions, only as permitted by applicable laws and regulations, and if I am an Authorized User for an organization or entity, only in accordance with the permitted purposes for that organization or entity as specified in its subscription agreement or order.
- I understand that data obtained through the PULSE Solutions may include Protected Health Information (PHI) and other personally identifiable and sensitive information governed by HIPAA and/or other federal and state privacy laws and regulations, and I will comply with all such laws and regulations in my use of the PULSE Solutions.
- With respect to queries to be made through the eHealth Exchange, I will comply with the relevant terms and conditions of the DURSA, currently available at https://ehealthexchange.org/wp- content/uploads/2019/11/DURSA-Restatement-II-of-the-DURSA-revised-August-13-2019-EXECUTABLE.pdf.
- With respect to queries to be made through national networks, I will comply with relevant flow-down terms from those networks as specified in the PULSE Solutions Policies and Procedures, as amended from time to time. This includes without limitation relevant flow-down terms from the Surescripts network with respect to medication history.
- I acknowledge that Ai or its partners or licensors respectively, retain sole and exclusive rights in the PULSE Solutions, and in any modifications, improvements, and derivative works thereof. I will not (and will not attempt to) reverse assemble, reverse compile, reverse engineer or otherwise translate or decode any PULSE Solutions or

I Agree | I Disagree

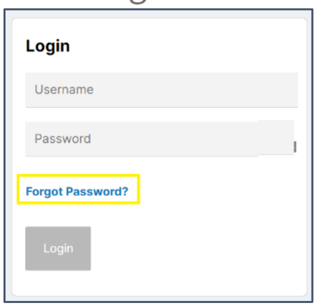
5. You will be directed to the Security Questions Page. Select three security questions from the drop-down options and enter your responses into the "Answer" field. Once completed, select the "Save and Continue" button. These security questions will be used if you forget your password in the future and need to reset it.




**Note:** Answers to the security questions are case sensitive.

## Password Reset

1. To reset a forgotten password, navigate to the PULSE Enterprise homepage. Select the “Forgot Password” button on the login screen.




2. Enter your username where indicated and select “Request Password”.

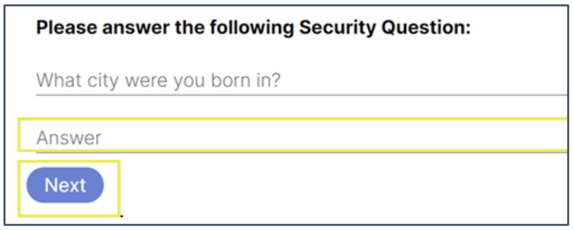

3. You will receive an email titled “Request to Reset Password”. Select the hyperlink within the email.


Dear ,

You can reset your password for [redacted] at https://api.stage-ainqapps.com/common/v1/resetPassword?tokenId=f868de27-0ff7-4e4f-b8a8-62454c353078&tenantId=THSA

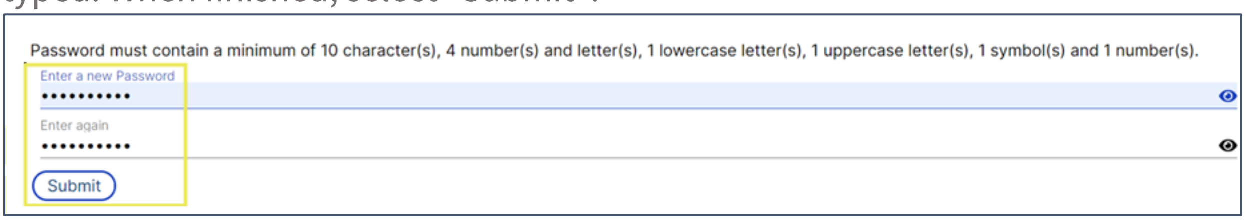
If the link above is not clickable, please copy and paste the URL into you browser's address bar. This link is valid for the next 1 hour(s). If the above link has expired, you can click **Forgot Password** on the Login screen to receive a new link.

4. This will bring you to a page asking for the answer to one of the security questions you set up during the account creation process. Type in your answer. When finished, select "Next".

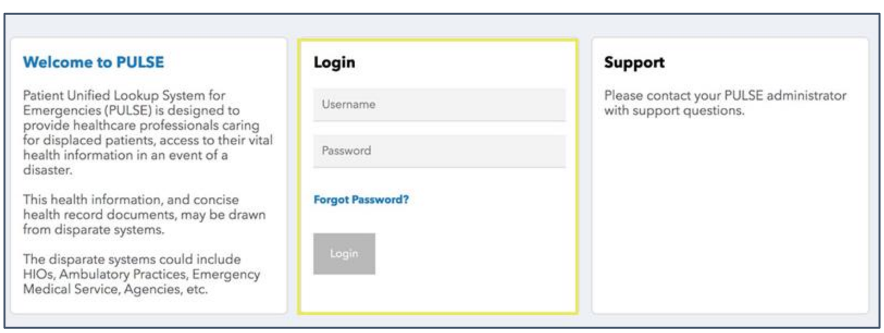



If a User forgets their security questions, an Administrator can reset their account from User Management. Resetting a user account allows the user to choose new security questions.

5. If you successfully answer the security question, you will be redirected to the Set Password screen, where you can create a new password (following the password instructions for length and type of character). Press to view the password you typed. When finished, select "Submit".




6. After selecting "Submit", you will be redirected to the PULSE login screen where you can enter your new password along with your username.



7. The Password Reset workflow is available for users who have forgotten their password, but still know their username. If you forget both your username and password, please contact the Ai Service Desk (see the Service Desk User Guide for more information).

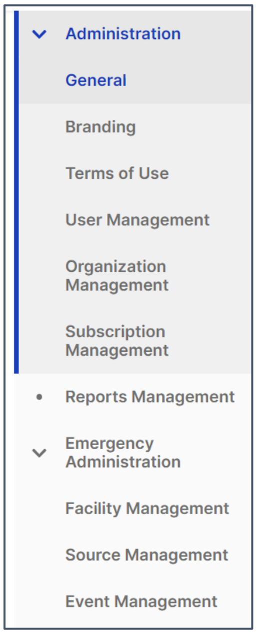
PULSE ENTERPRISE ADMINSTRATOR USER GUIDE

# ADMINISTRATION

## Administration Overview

1. To access the Administrator Dashboard once logged in, select "Tenant Administration" from the Hamburger Menu in the upper left corner of the screen.


2. Based on the Administrator Roles you are granted, you may have access to all or some of the functions listed on panel: Administration, Reports Management, and Emergency Administration.



## General

**NPI:** To enable Medication History functionality for PULSE Users globally (i.e., across all Organizations), a National Provider Identifier (NPI) must be entered into this field. A correctly formatted NPI is ten numeric digits. An invalid or incomplete NPI will result in a failure to return medication results for searched patients by a PULSE User. Alternatively, an NPI can be entered for each individual Organization using Organization Management.

**Support Information:** Language included in this text box will be displayed on the right-hand side of the login screen. You may wish to populate this box with specific instructions for how Users should access technical or operational support from Administrators, such as a phone number or email address.

**Copyright Information:** Audacious Inquiry copyright language will always display in the footer of the system. If your Organization has additional copyright or grant-funding requirements to display, please discuss them with your Engagement Manager at Ai before making any changes.

**Display text on the login screen:** Language included in this text box will be displayed on the left-hand side of the login screen. You may wish to populate this box with a greeting to Users and description of the product.

## Administration

In this section, Tenant Administrators can modify systemwide settings, including the global National Provider Identifier (NPI), the support information displayed on the login screen, copyright information, and the welcome information displayed on the login screen.

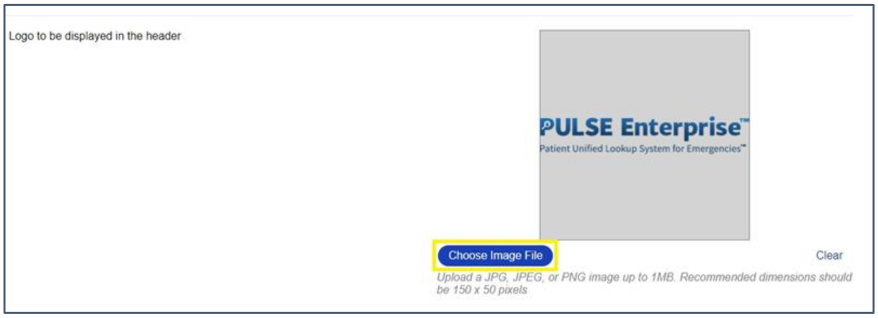
Upon first login, the fields will be pre-populated based on the information provided to Ai during the initial implementation process.


You can search for information on this page by using the “Search” box. You will see the Search box in other Administrator Dashboard pages as well and you can use it to search for content contained in each page.

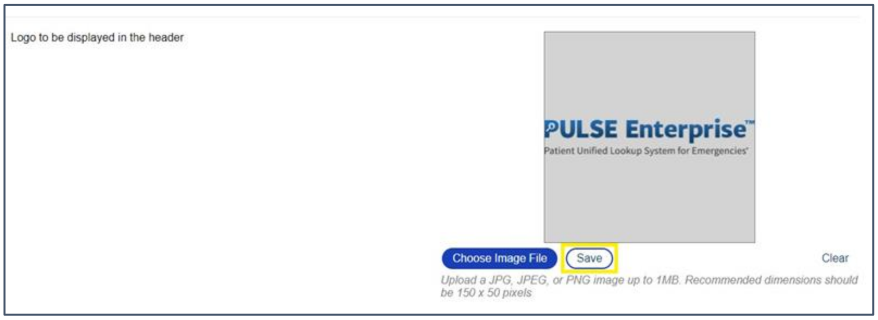
## Branding

In this section, you can update the image files shown in the header and login screen. Upon first login, the fields will be pre-populated based on the information you provided to Ai during initial implementation.

To upload a new file, select "Choose Image File", browse, select the file you want to upload. Follow the recommended dimensions, file type, and file size for best viewing results.

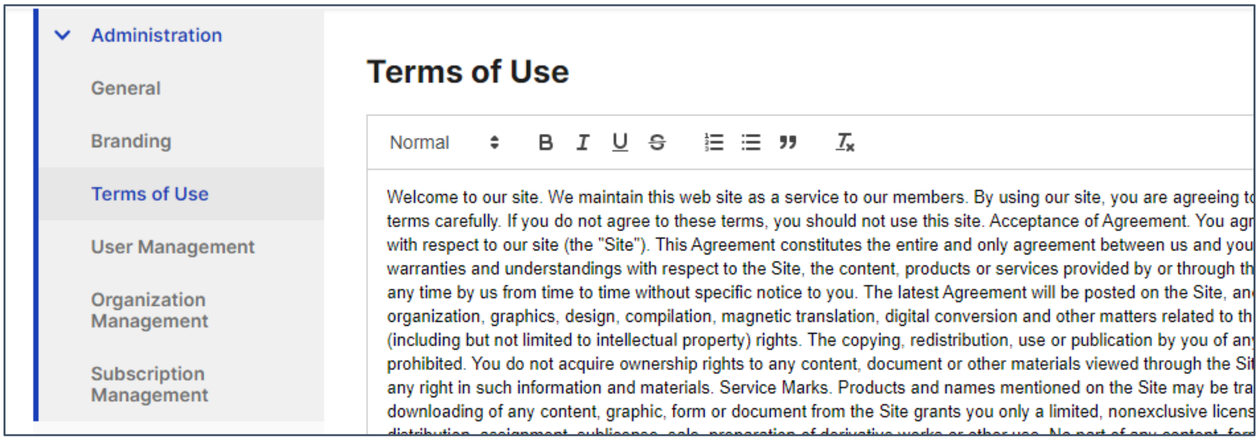



Select "Save".



## Terms of Use

By default, the Terms of Use language mirrors what is included in your PULSE legal agreement. If you want to update or add to the Terms of Use information, please discuss with your Engagement Manager at Ai before making any changes. The Terms of Use language will be displayed to users upon their first login after account creation, to users whose accounts get reset, and to all users whenever the Terms of Use language has been updated.



PULSE ENTERPRISE ADMINSTRATOR USER GUIDE

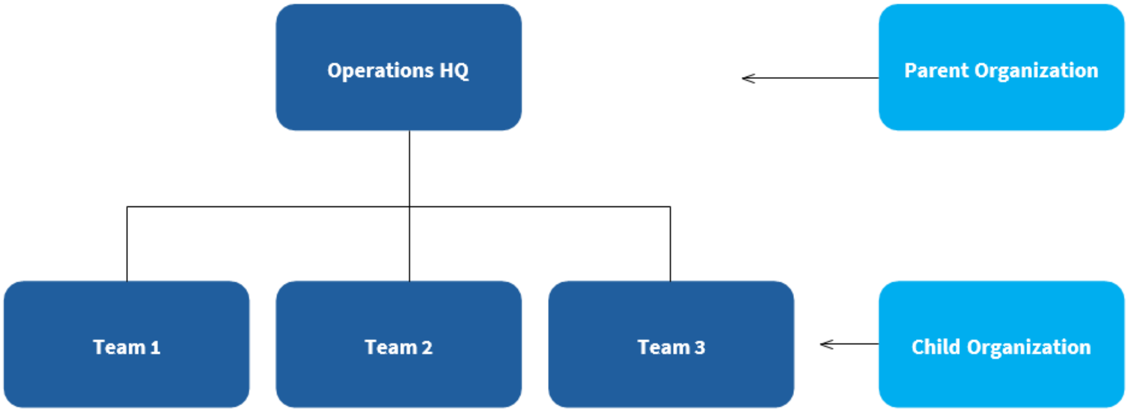
# ORGANIZATION MANAGEMENT

## Organization Management Overview

An Organization is a way to group and associate Users with each other and with specific Locations and Facilities. Organization Management allows an Administrator to create and edit Organizations and subordinate Organizations, assign Users and Locations/Facilities to each Organization, and input an Organization-level NPI, if applicable. Organizations are added to an Event, which when active enables Users in that Organization to conduct Patient Search and/or Emergency Census in their Facility or Facilities related to that Event.

Organizations can be created as standalone or as part of a hierarchy. In the example shown here, 'Operations HQ' serves as the parent organization to 'Team1', 'Team2', and 'Team3'.

Every User must be associated with an Organization. This relationship dictates the Locations and Facilities to which the User has access. Association of Users and Locations/Facilities to an Organization are covered in the "User Management" and "Facility Management" sections of this guide.




An Organization may have one or more assigned Administrators. Administrators are able to complete certain administrative tasks within the Administrator Dashboard based on their permission levels (described in User Management and Appendix C).

When an Administrator manages an organization, they can do the following:

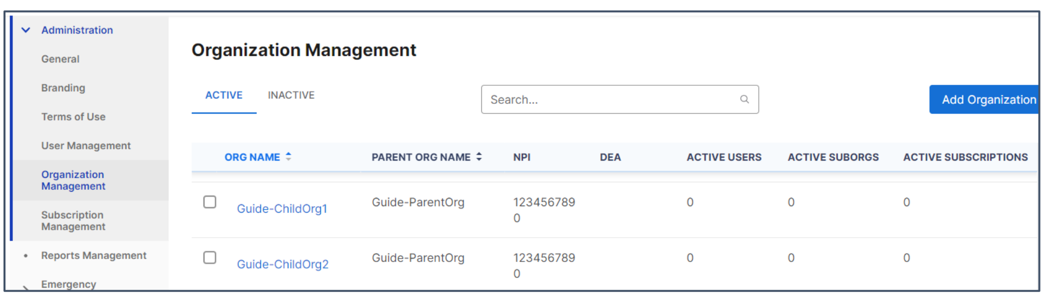
- Assign specific Users to this Organization
- Activate/Deactivate all associated Users by activating or deactivating the Organization
- Assign specific Locations/Facilities to the Organization
- Input an Organization-level NPI to enable Medication History for Users in the Organization

## Organization Management Homepage

The Organization Management Homepage allows Administrators to create and manage Organizations.

You can access Organization Management by navigating to the Organization Management Homepage from the Administration section of the Hamburger Menu. Here you can view a summary of your existing Organizations. Each row shows summary information about an Organization:

- **Org Name:** the name of the Organization.
- **Parent Org Name:** the name of the Parent Organization within this Organization's hierarchy if one exists.
- **NPI:** the National Provider Identifier associated with that Organization if one has been entered.
- **Active Users:** the total number of active users associated with that Organization.
- **Active Suborgs:** the number of active subordinate Organizations that have been created underneath that Organization.
- **Active Subscriptions:** this will always be zero (0)



From the Organization Management Homepage you can:

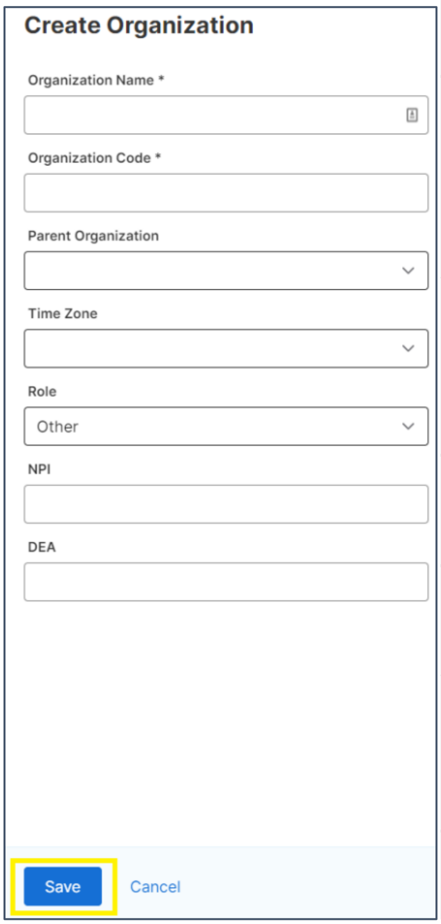
- Add a New Organization
- Search For and Sort Existing Organizations
- Update an Organization
- Activate an Organization
- Deactivate an Organization

## Add a New Organization

A Tenant Administrator can add a new Organization or sub-Organization anywhere within the system. An Organization Administrator can create a new sub-Organization under their own Organization or an existing sub-Organization that they manage. Organization Managers cannot create new Organizations.

1. To create a new Organization, select the “Add Organization” button.


2. Enter the information in all required fields (*) in the Create Organization page. At minimum you will provide a unique Organization Name and Organization Code; these must not be the same as any other Organization Name or Organization Code within the system. You will be informed if you attempt toreuse an existing Name or Code.




**Field Requirements for Creating a New Organization**

| Field Name | Required / Optional | Field Requirements | Notes |
|---|---|---|---|
| Organization Name | Required | A minimum of 3 alpha-numeric characters, with no spaces. E.g. AiHeadquarters | This must be a unique name and cannot be duplicated in any other Organization hierarchy within the system. |
| Organization Code | Required | A minimum of three (3) alpha-numeric characters, with no spaces. E.g. AHQ | The code is used to uniquely identify an organization for audit purposes. This code cannot be changed once entered; if the Organization Name changes for any reason, all activity will be linked back to this unique Organization Code. |
| Parent Organization | Optional | Select from the drop-down menu. If left blank, no parent will be attributed to your Organization. | Find more information about Parent Organizations and Organization Hiearchy in the "Creating Organization Hierarchy" section later in this guide. |
| Time Zone | Optional | If using, select from the drop-down menu. | This field may be left blank. |
| Organization Role | Optional | Select from the drop-down menu. | This field is not relevant to PULSE and thus can be left to the default of "Other". |
| NPI | Optional | If entered, must be ten (10) numerals, consistenting of a valid National Provider Identifier. | Find more information about the use of Organization NPI in the "Organization National Provider Identifier" section. |
| DEA | Optional | This field is not relevant to PULSE. | This field may be left blank. |

Once you have completed all relevant fields for your Organization, select "Save" to create the Organization andreturn to the Organization Management Homepage. Once created, an Organization cannot be deleted, but it can be edited or deactivated.

## Organization National Provider Identifier (NPI)

A National Provider Identifier (NPI) must be used to enable the Medication History functionality.

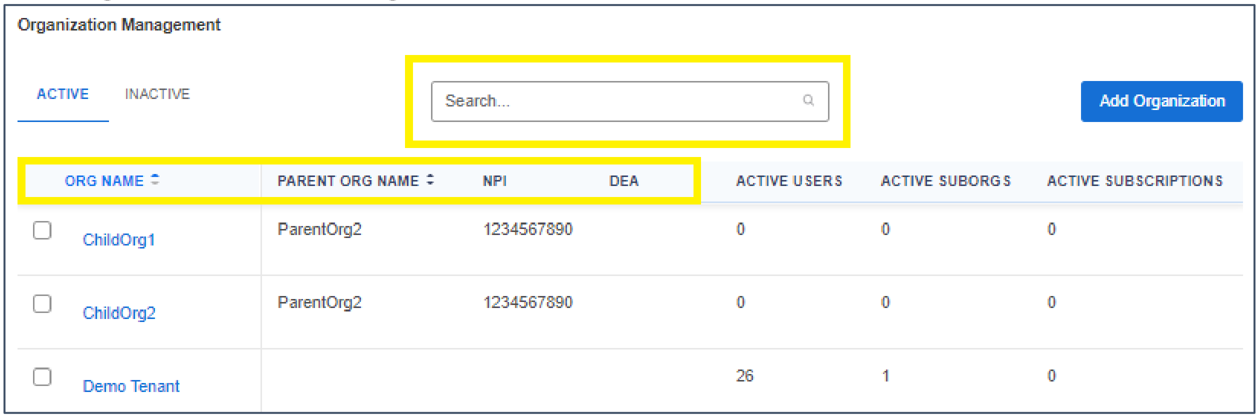
The Tenant Administrator, Organization Administrator, or Organization Manager can provide an Organization-level NPI through Organization Management. This allows PULSE Users associated with that particular Organization to query for Medication History data.

The same NPI may be used by one or more Organizations. However, if an Organization NPI is shared across Organizations (e.g., by an Organization and its sub-Organizations or across two unrelated Organizations), the NPI must be separately entered for each.

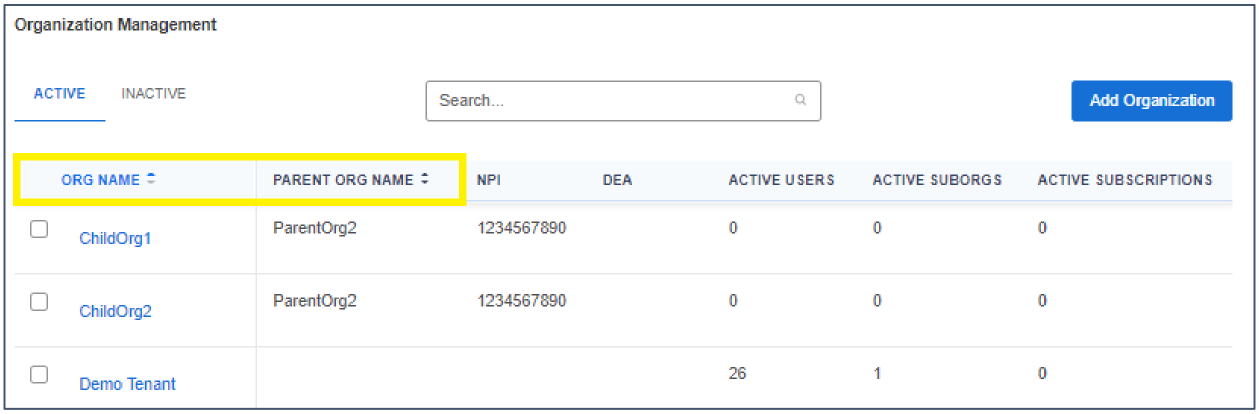
**Tip!** If both a Global NPI and Organization-level NPI are available for a specific Organization, the Organization-level NPI should be entered when Creating an Organization.

## Search For and Sort Organizations

1. To search within the Organization Management Homepage, type your keyword in the “Search” box at the top of the page. This searches the content of all entries in the Org Name, Parent Org Name, and NPI fields.



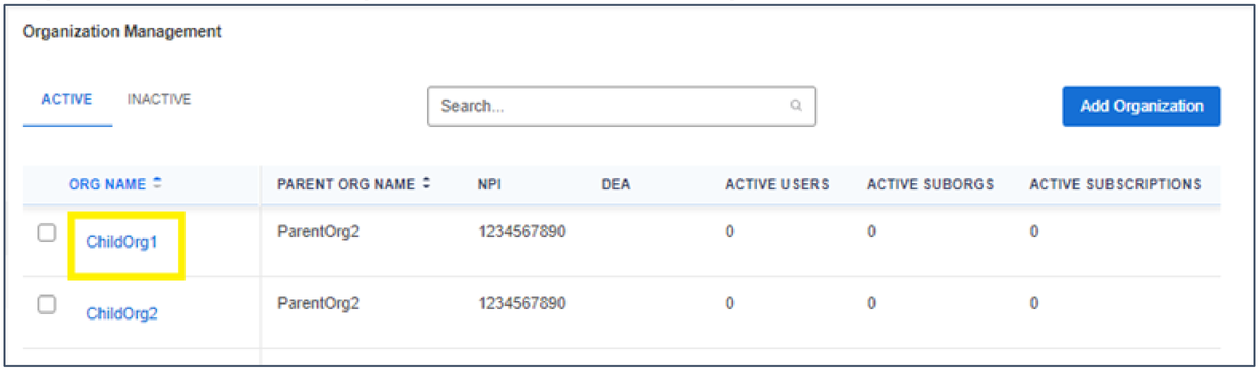

2. To sort the contents of the Organization Management Homepage results, click on the up and down arrows on the Org Name or Parent Org Name fields.



## Update an Organization

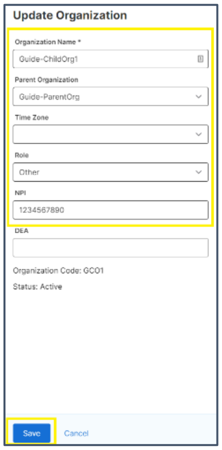
An Administrator can update any Organization that they have permissions to view in the system.

1. On the Organization Management Homepage, select the name of the existing Organization by clicking on the hyperlinked Organization Name.




2. In the Update Organization box, you can change or enter additional information for any available field: Organization Name, Parent Organization, Time Zone, and NPI.

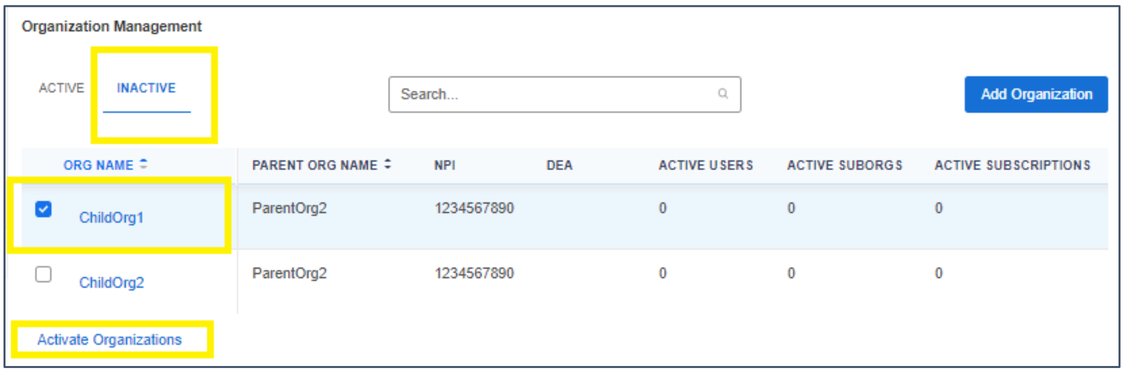
Role is an optional field and will default to 'Other'. DEA number can also be edited but is not relevant for the system and can remain blank.




3. Click "Save" when you are finished completing updates to implement your changes and return to the OrganizationManagement Homepage.

## Activate an Organization

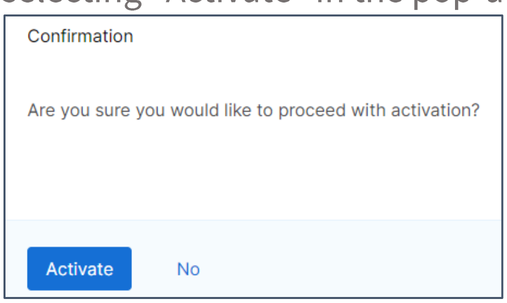
1. Toggle to “Inactive” at the top of the Organization Management Homepage to view Organizations that can be activated.




2. Select the checkmark next to one or more Organizations you want to activate or reactivate.

3. Select “Activate Organizations” at bottom of screen.

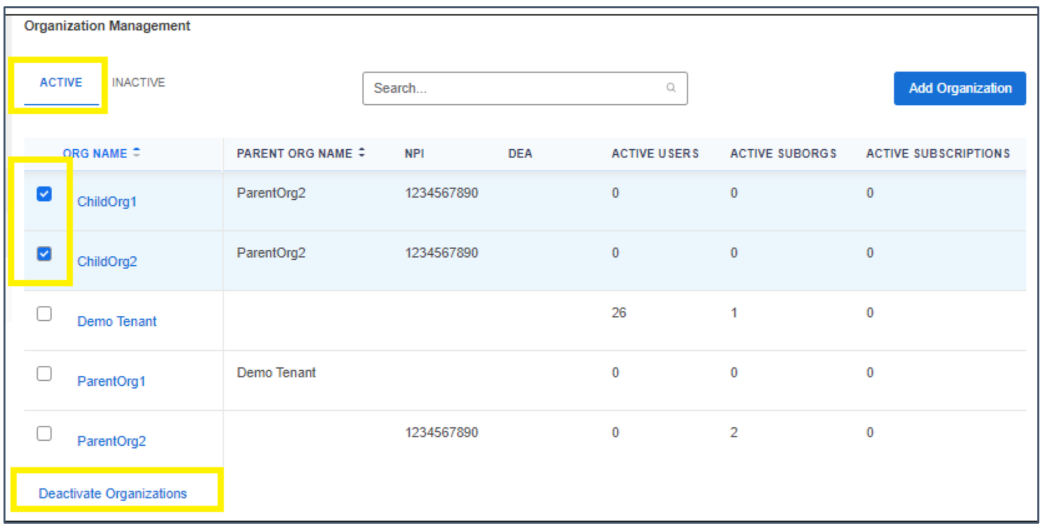
4. You will be asked to confirm that you would like to activate the Organization by selecting “Activate” in the pop-up box.




**NOTE:** Once you confirm, the Organization will become Active and all Active Users associated with the Organization can log into the system. If there are active Events and Facilities associated with this Organization, Users will be able to complete authorized activities like Patient Search.

## Deactivate an Organization

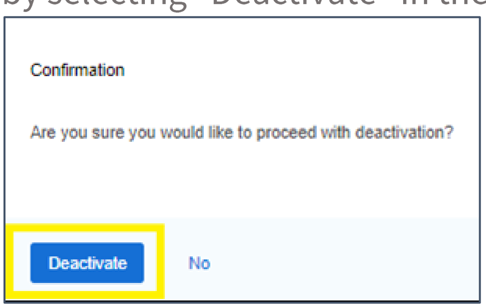
1. Toggle to “Active” at the top of the Organization Management Homepage to view Organizations that can be deactivated.




2. Select the checkmark next to one or more Organizations you want to deactivate.

3. Select the “Deactivate Organizations” at bottom of screen.

4. You will be asked to confirm that you would like to deactivate the Organization(s) by selecting “Deactivate” in the pop-up box.



**NOTE:** Once the Organization is deactivated, all Users associated with that Organization will be unable to log into the system until/unless they are associated with another Active Organization.

# PULSE ENTERPRISE ADMINSTRATOR USER GUIDE

# USER MANAGEMENT

## User Management Overview

Individuals may be granted one or more user roles depending on the features and functionalities to which they require access.

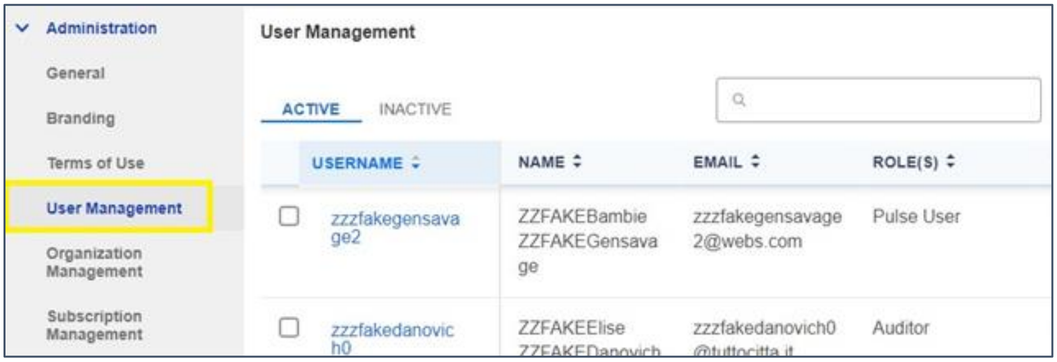
An overview of default User Roles is described in the "Who Will Use This Guide" section of this guide.

Refer to Appendix C for a table of role-based access to system functions.

## User Management Homepage

The User Management Homepage allows Administrators to create and update Users within the Organization(s) they manage.

Navigate to the User Management Homepage from the Administration section of the Hamburger Menu.



On the User Management Homepage you can see summary information about each existing User Account, including User Name, Name, Email Address, Role(s) Assigned, Organization affiliation, Subscriptions (not applicable), and the date they last accessed the system.

From the User Management Homepage you can:

- Create a New User Account
- Search for a User
- Edit a User Account
- Activate a User Account
- Deactivate a User Account
- Reset a User Account

# Create a New User Account

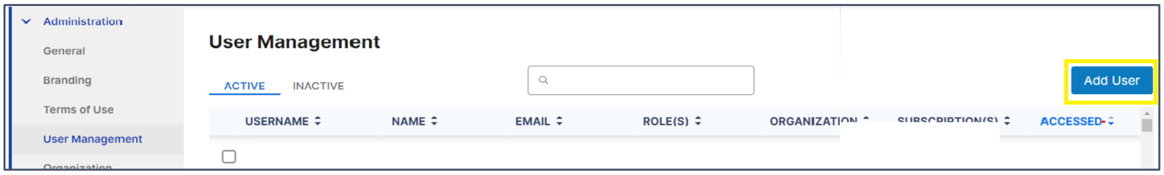
## *Create New User Accounts in Bulk*

If you have a large number of users that you would like to provision, you can submit a service request through the Ai Service Desk and an Ai Support Engineer will assist you with bulk user account creation.

The information you may need for bulk account creation includes the following for each User: Username, First Name, Last Name, Email Address, Role(s), and Organization, provided as a .csv file.

## *Create a Single New User Account*

1. From the User Management Homepage you can add a single new user account by selecting "Add User".



2. Enter the information in all the required fields (*).

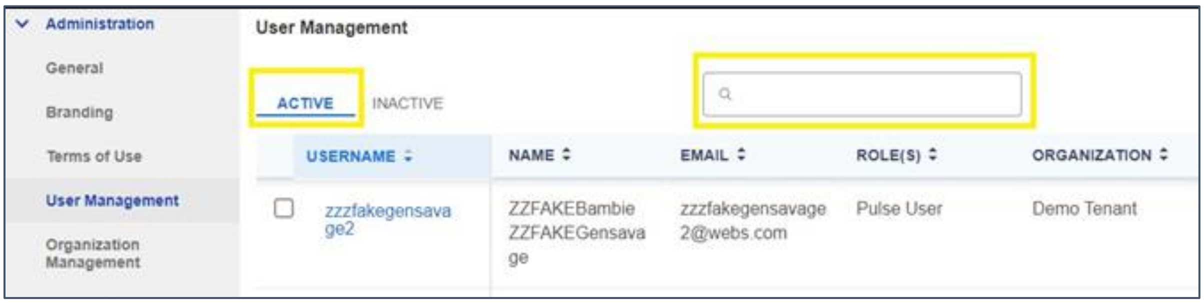

- **Username:** must be a unique username for the individual. Usernames may include hyphens (-), but should not include spaces, punctuation, or special characters.
- **First Name:** first name of the user
- **Middle Name:** middle name of the user (not required)
- **Last Name:** last name of the user
- **Email:** valid individual email address for the user; email addresses may not be reused across accounts within the system. Users will receive account activation and password reset emails through the email address associated with their user accounts.
- **Role:** Select one or more roles for the user. Please refer to Appendix C of this guide for system permissions associated with each user role.
- **Organization:** Select one Organization to which this User will be affiliated. You will be able to select from among the Organizations for which you have

3. When you have completed the relevant fields, select “Save” to create the User Account.

**NOTE:** The User account will be created and by default be set as Active. The User will receive an Account Creation email with a URL link to log into the system. If the User in not associated with an Active Event, the User will be able to complete account creation but will not have access to Patient Search or Emergency Census upon log-in.

## Search for a User

1. You can search for an existing user that is active by toggling to the "Active" status and typing keywords in the Search box. Keywords will be searched across the following fields: Username, Name, Email, Role(s), Organization, Subscription, and Accessed Date.



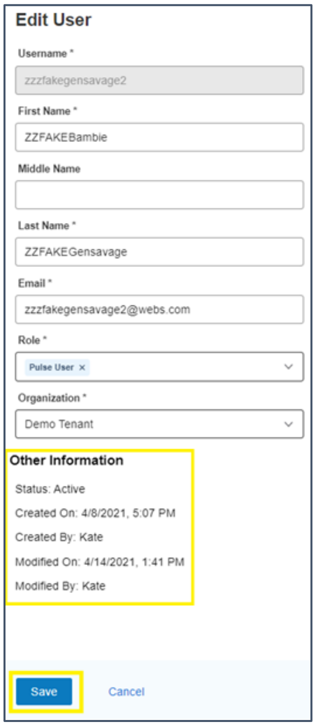

2. Similarly, you can search an inactive user by toggling to the "Inactive" status and typing in the Search box.


3. You can sort Users by using the arrows next to all fields on the User Management Homepage.

## Edit a User Account

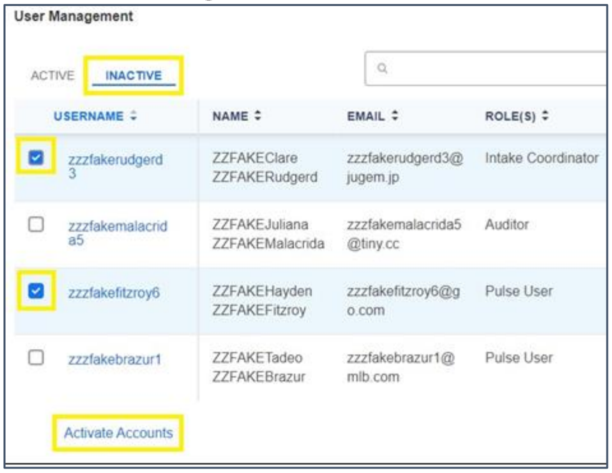
1. Select the account you want to edit by clicking on the hyperlinked Username.


2. Modify the information in the Edit User box as desired and select "Save". Information regarding the creation date, author, and any modifications will be displayed. If you change the User's Role and/or Organization, their permissions and access updates will be reflected at their next login to the system.

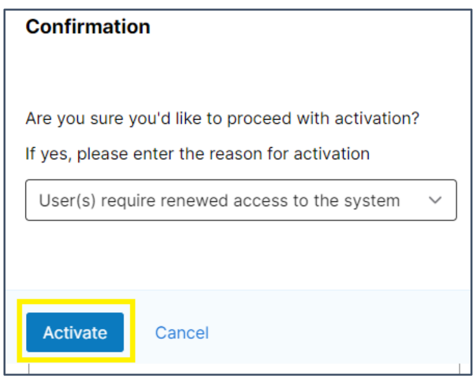


## Activate a User Account

1. To activate a user account, toggle to Inactive status, select the User(s) you want to activate using the checkbox next to the Username, and select “Activate Accounts”.




2. You will be prompted with a confirmation message and asked to select the reason for activation. Select the most applicable reason and press “Activate”.

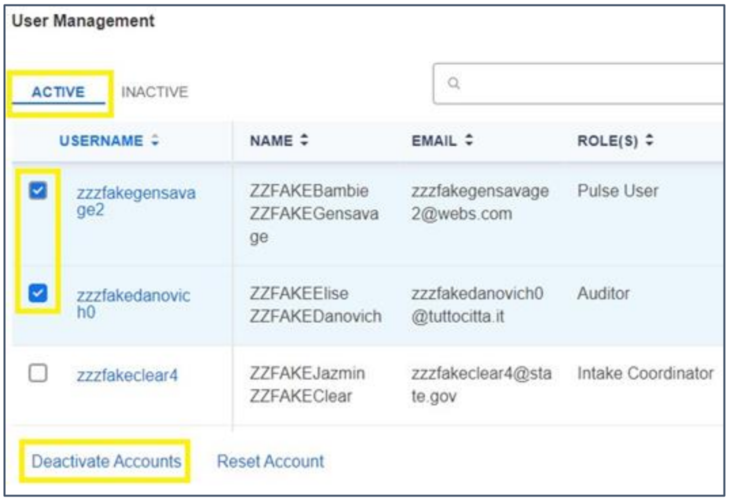



If you select “Cancel”, you will be directed back to the User Management Homepage.

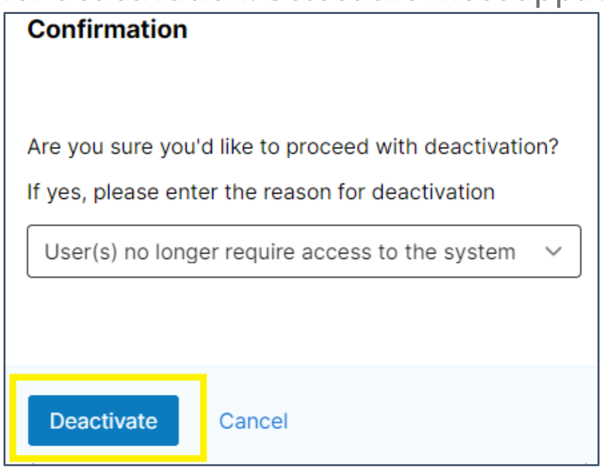
Once the account is activated, the User will receive an Account Activation email and can click on the URL link in the email to be directed to the login page.

## Deactivate a User Account

1. To deactivate a user account, toggle to Active status, select the user(s) you want to deactivate by using the checkbox next to each Username, and select "Deactivate Accounts" at the bottom of the screen.




2. You will be prompted with a confirmation message and asked to select the reason for deactivation. Select the most applicable reason and press "Deactivate".

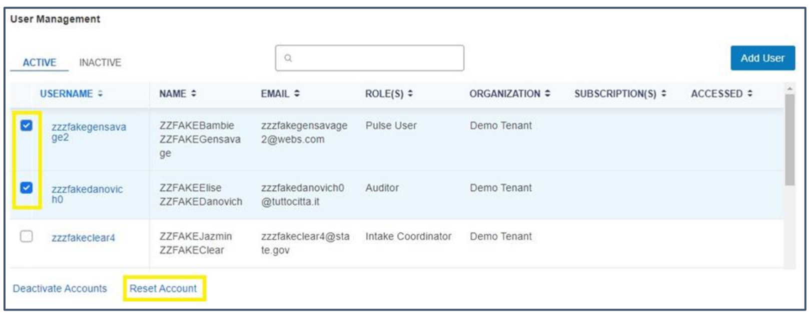



3. If you select "Cancel", you will be directed back to the User Management Homepage.

## Reset a User Account

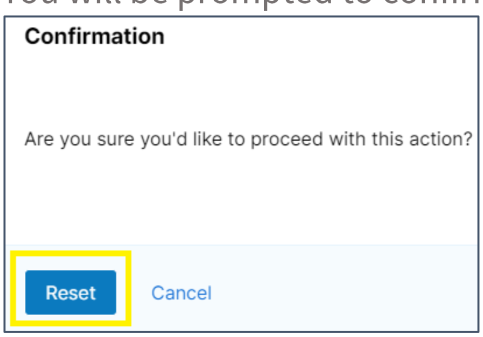
1. If Users are unable to reset their password themselves, you can assist them through the User Management Homepage. For example, the User may have forgotten their Username or answers to the Security Questions.

   Select the User account(s) that you want to reset and click on "Reset Account" at the bottom of the screen.

   The Administrator resetting the User Account is responsible for verifying the individual's identity and that they continue to meet the requirements of an Authorized User.

2. You will be prompted to confirm that you would like to proceed with this action.

   The User will be sent an Account Activation email with instructions on how to create a new password, select security questions, and provide answers to those questions.

PULSE ENTERPRISE ADMINSTRATOR USER GUIDE

# FACILITY MANAGEMENT

## Facility Management Overview

The system can be deployed to multiple alternate care facilities at the same time. Administrators can manage which Facilities are made available to Users through the Facility Management function.

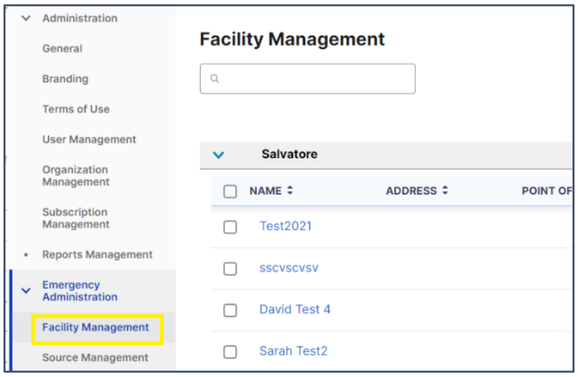
> **Facilities** are the physical locations at which care is being provided and Users have been activated (e.g., an alternate care facility).
>
> **Locations** can be used to group Facilities, perhaps by lead agency (e.g., Headquarters) or by jurisdiction (e.g., County, City).

All Facilities must be linked to a Location and a Location must be associated with an Organization. Users will only see the Locations and Facilities associated with their Organization when they log into the system.

## Facility Management Homepage

The Facility Management Homepage allows Administrators to create and associate Locations and Facilities with Organizations, as well as modify, activate, and deactivate Locations and Facilities.

To access Facility Management, navigate to the Facility Management Homepage from the Emergency Administration section of the Hamburger Menu.



# FACILITY MANAGEMENT

On the Facility Management Homepage, you can view summary information about each Location and Facilities associated with the Location.

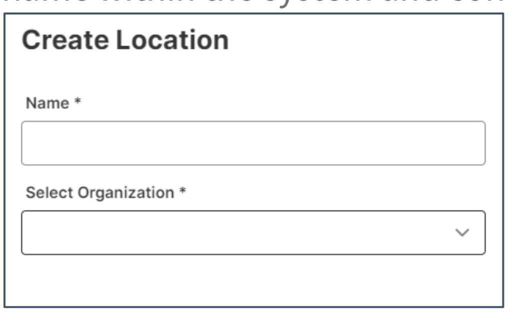
From the Facility Management Homepage you can:

- Create a New Location
- Modify an Existing Location
- Create a New Facility
- Modify Facility Information
- Activate or Deactivate a Facility
- Search for a Location or Facility

## Create a New Location

1. To create a new Location, select “Create Location” located on the upper right side of the screen.


2. In the Create Location box, enter the name of the Location. This must be a unique name within the system and contain a minimum of 3 alpha-numeric characters.

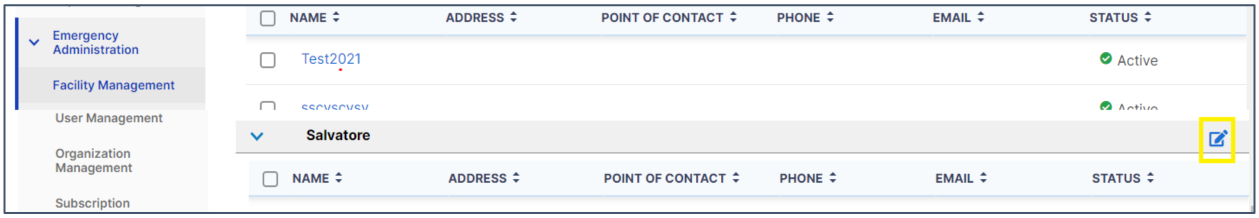



3. From the “Select Organization” drop-down menu, select the Organization you want to associate the Location with. Each Location and its grouped Facilities can only be associated with one Organization. You will be able to select from among the Organizations for which you have administrative permissions.

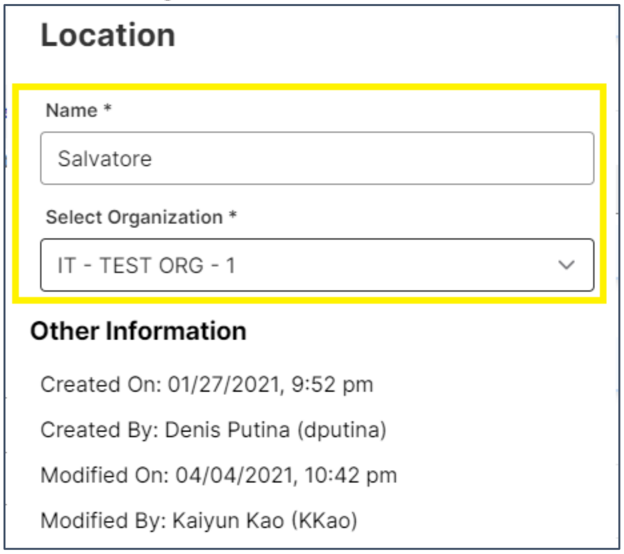
4. Select “Save” to return to the Facility Management page.

## Modify an Existing Location

1. To modify an existing Location, from the Facility Management Homepage, select the icon next to the Location you want to modify.




2. Enter the updated name for the Location or select a different Organization from the "Select Organization" drop-down menu.

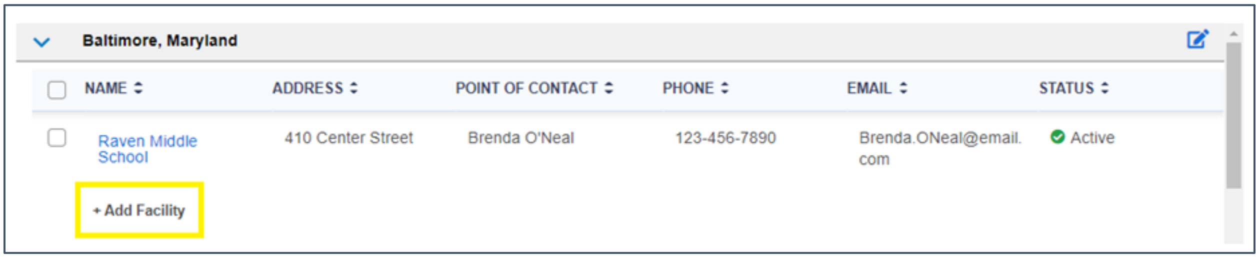



   Information regarding the creation date, author, and any modifications will be displayed.

3. Select "Save" and return to the Facility Management Homepage.

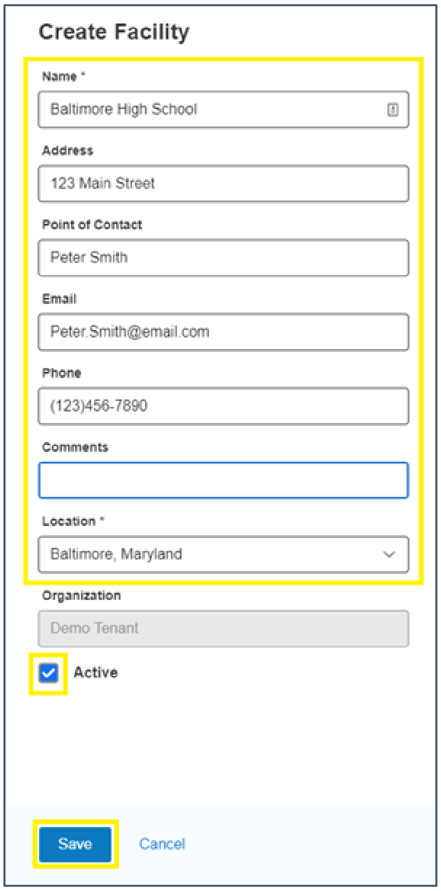
## Create a New Facility

1. Navigate to the Location to which you want to assign the Facility, open the dropdown menu to the left of the location name and select "+ Add Facility".




2. Enter the Name of the Facility (required) and any of the optional fields. Many of these fields are displayed to End Users when completing Patient Search and Check-In/Check-Out and will be available to view in Census View.

- **Name:** the name of the Facility to be displayed and shared; this field is required
- **Address:** the location of the Facility; this field is optional
- **Point of Contact:** the name of the main contact at that Facility; this field is optional
- **Email:** the email address associated with Facility; this field is optional
- **Phone:** the phone number associated with Facility; this field is optional
- **Comments:** additional information to document; this field is optional
- **Location:** select from Locations available to you to associate the Facility with a specific Location; this will be pre-populated based on your selection in the Facility Management Homepage; this field is required
- **Organization:** the Organization will auto-populate based on the Location selected for this Facility; this field is required

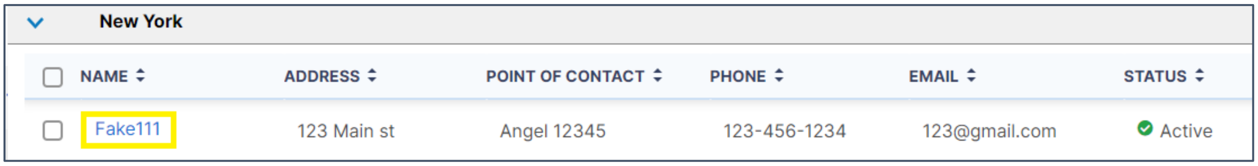



The newly added Facility will be marked as "Active" by default. You can deselect the check box next to "Active" if you are not yet ready to activate the Facility.

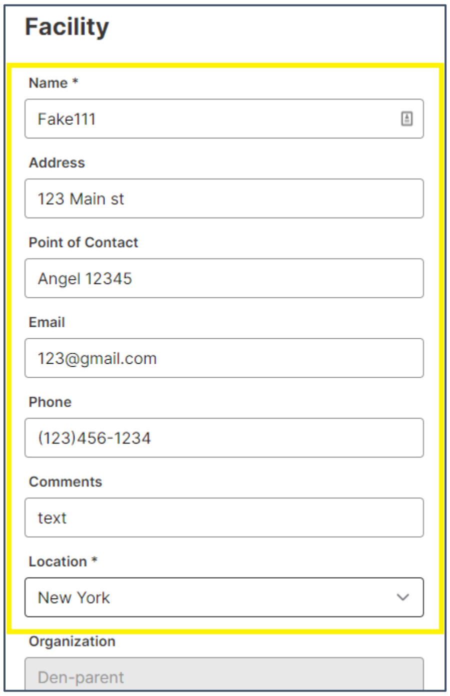
3. Select "Save" to complete the Create Facility process and return to the Facility Management Homepage.

## Modify Facility Information

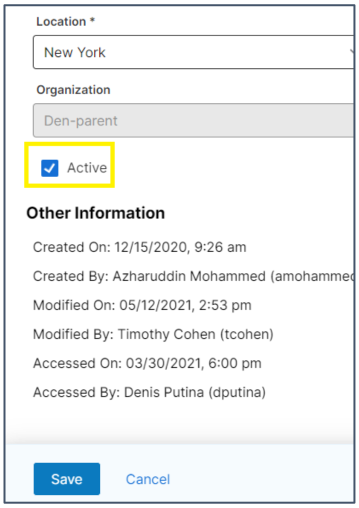
1. On the Facility Management Homepage, select the name of the Facility you would like to modify.




2. You can update or enter additional information for the Facility including Address, Point of Contact, Email Address, Phone Number, Comments, and Location.

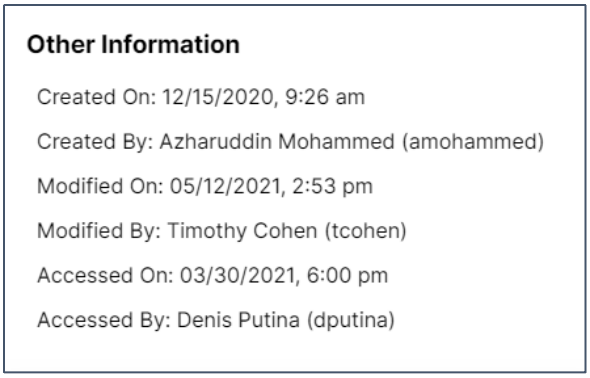


You can activate or deactivate the Facility by checking or unchecking the "Active" radio button.




3. Select "Save" to return to the Facility Management Homepage.

4. In the Facility modification screen, information regarding the creation date, author, and any modifications to this facility will be displayed.



## Activate or Deactivate a Facility

1. Facility activation status (e.g., Inactive or Active) will appear in the far-right column of the Facility Management Homepage.


2. To activate/deactivate one Facility or multiple Facilities, select the checkbox(s) next to the desired Facility name(s) and then select “Activate Facilities” (or “Deactivate Facilities) at the bottom of the screen.

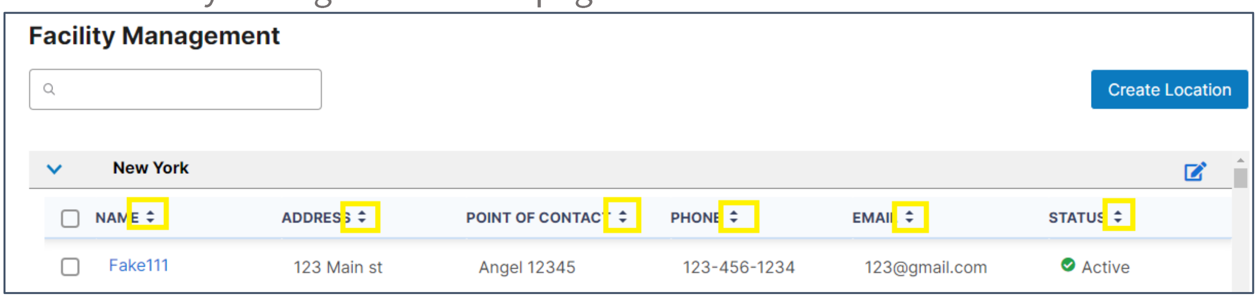

3. To activate/deactivate all listed Facilities at once, select the check box at the top next to “Name” in the column header, and then select “Activate Facilities” (or “Deactivate Facilities) at the bottom of the screen.

## Search for a Location or Facility

1. To search for a specific Location or Facility, enter the keywords into the Search bar on the Facility Management Homepage.


Keywords may include information in the Name, Address, Point of Contact, Phone Number, or Email Address fields. Matching results will appear on the screen.

2. You can also sort Facilities within a Location by using the arrows next to all fields on the Facility Management Homepage table.



PULSE ENTERPRISE ADMINSTRATOR USER GUIDE

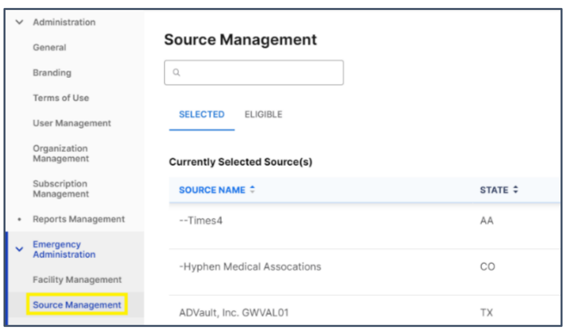
# SOURCE MANAGEMENT

## Source Management Overview

Source Management allows Tenant Administrators to custom-select the sources that the system will query from across the participating national health information networks. Sources will be pre-selected based on the information discussed during initial implementation but can be updated at any time. To view a complete and up-to-date list of participants on eHealth Exchange, go to their website at https://ehealthexchange.org/participants/.

## Source Management Homepage

You will access Source Management by navigating to the Source Management Homepage from the Emergency Administration section of the Hamburger Menu.




The Source Management Homepage allows you to select, update, and view the sources queried by the system during Patient Search.

On the Source Management Homepage, you can view all sources available on the national health information networks.

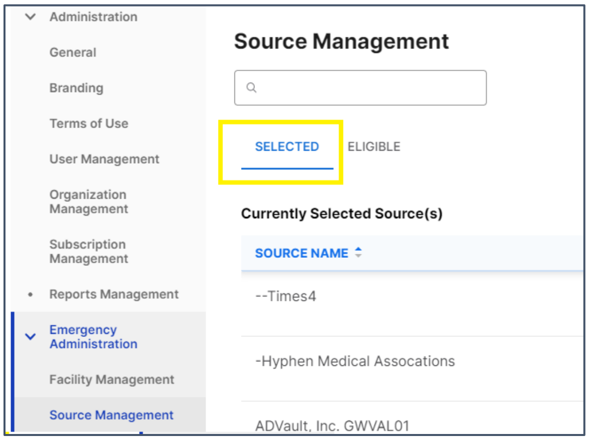
From the Source Management Homepage, you can:

- View Sources by Selected and Eligible
- Add and Remove Sources
- Sort Sources Alphabetically by Name
- Sort Sources Alphabetically by State

## View Sources by Selected and Eligible

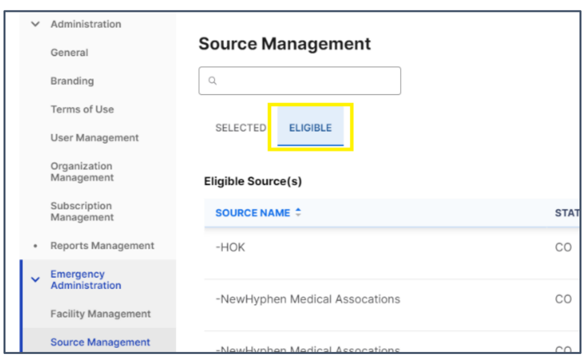
### *Selected*

Selected sources are Sources that will be queried during Patient Search. Selected sources will appear on the Selected tab of the Source Management Homepage.




### *Eligible*

Eligible sources are Sources that will not be queried during Patient Search, but that are available to be selected. Eligible sources will appear on the Eligible tab of the Source Management Homepage.




You will be able to easily identify selected and eligible Sources by toggling between the *Selected* and *Eligible* tabs in the Source Management Homepage.

## Add and Remove Sources

### *Add Sources*

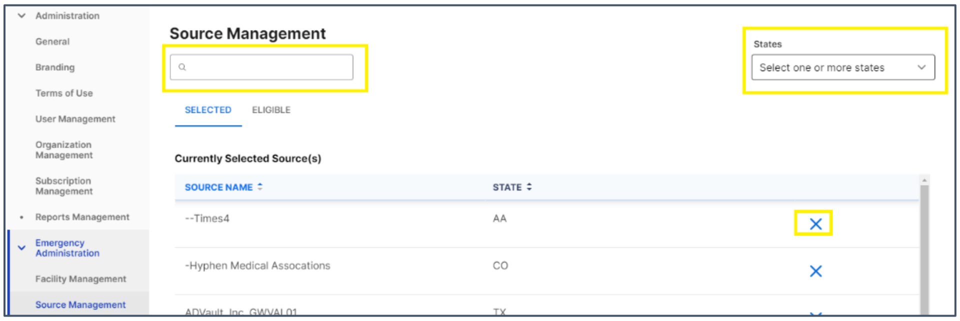
From the Eligible tab, you can easily add an eligible Source by selecting the "+" icon next to the Source you wish to add. The selected Source will be moved from the Eligible tab to the Selected tab. Changes will be automatically saved.


You can search for a Source by searching for Source Name or by filtering Sources by the State of the Source organization.

NOTE: Some sources are nationwide, meaning a single source provides data coverage for many or all locations for that organization (e.g., CVS MinuteClinics). They may be attributed to a specific state but provide national coverage. Please contact your Administrator or Ai Support if you have any questions.

### *Remove Sources*

From the Selected tab, you can easily remove a selected Source by selecting the "x" icon next to the Source you wish to remove. The selected Source will be moved from the Selected tab to the Eligible tab. Changes will be automatically saved.




You can search for a Source by searching for Source Name or by filtering Sources by the State of the Source organization.

## Sort Sources Alphabetically by Name

To sort Sources alphabetically (ascending or descending) by Name, click on the arrow next to the Source Name header.

**Currently Selected Source(s)**

| SOURCE NAME | STATE |
| --- | --- |
| --Times4 | AA |

## Sort Sources Alphabetically by State

To sort Sources alphabetically (ascending or descending) by State, click on the Arrow next to the State header.

**Eligible Source(s)**

| SOURCE NAME | STATE |
| --- | --- |
| Cheyenne Regional Medical Center GWVAL01 | WY |
| QHC Evanston Clinic Corp | WY |

# PULSE ENTERPRISE ADMINSTRATOR USER GUIDE

# EVENT MANAGEMENT

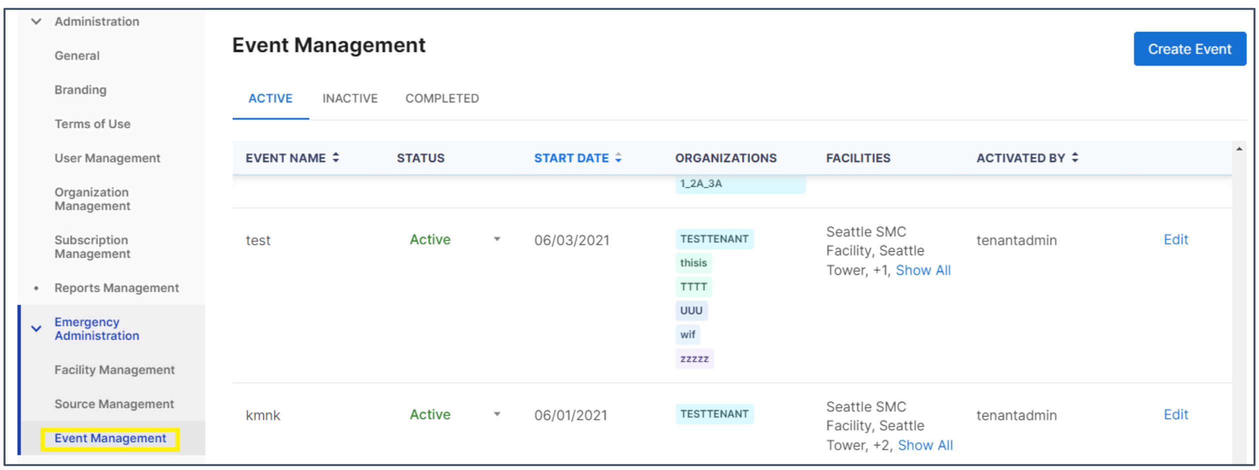
## Event Management Overview

The Event Management Homepage gives Tenant and Event Administrators the ability to proactively create multiple Events and manage the Organizations and Facilities associated with each Event. The Event Management Homepage allows Administrators to perform the initial administrative work required to create and activate a known or potential Event ahead of time, leaving time to support other critical activities when/if the Event occurs.

The Organization Administrator will be able to view all Events, in addition to having the ability to add/remove Facilities associated with their Organization.

## Event Management Homepage

You will access Event Management by navigating to the Event Management Homepage from the Emergency Administration section of the Hamburger Menu.

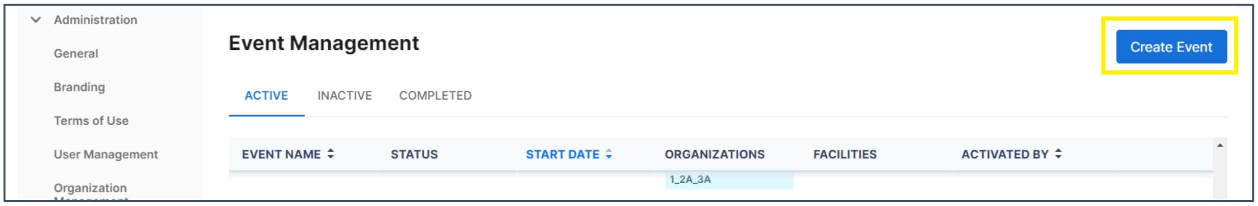


From the Event Management Homepage, you can:

- Create Events
- Change Event Status
- View Events
- Edit Events

## Create Events

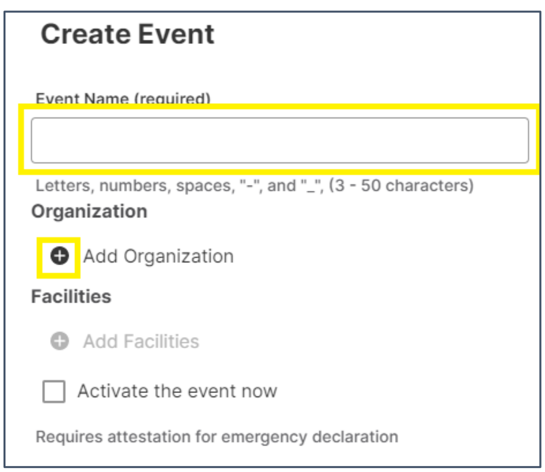
1. You can create an Event by selecting the "Create Event" button located at the top right corner of the Event Management Homepage.



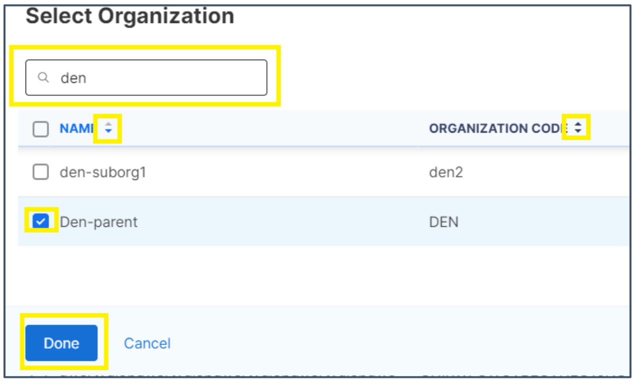

2. You will be required to enter an Event Name and can choose to add Organizations and Facilities now or at a later date.

   **Note:** End Users do not see the Event Name when they log into the system. They will only be shown the Facilities associated with the given Event to which their Organization has been assigned.

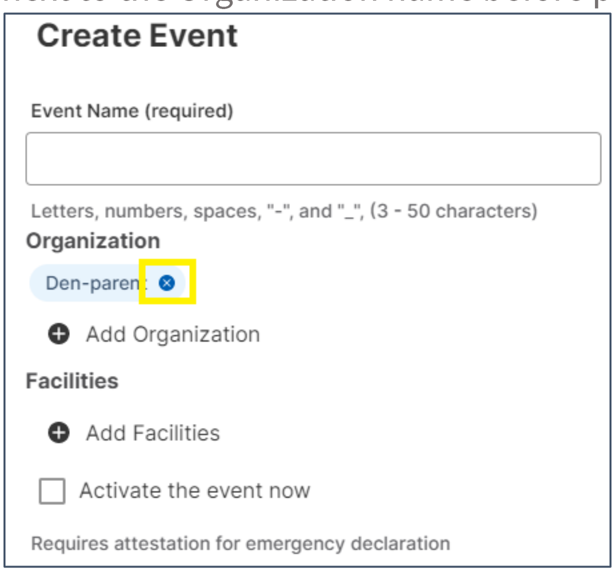
   To add an Organization select the "+" icon next to "Add Organization". Select one or more Organizations that will be associated with the Event you are creating. By adding an Organization to an Event, you are associating the Users in that Organization with the Event.



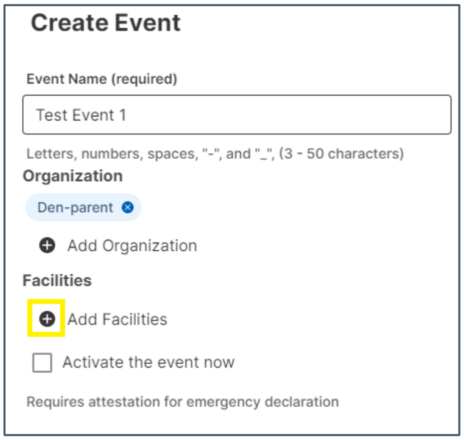
You can search for, and sort by, Name and/or Organization Code. Once you have selected the Organization(s), select “Done”. Both Active and Inactive Organizations can be added.



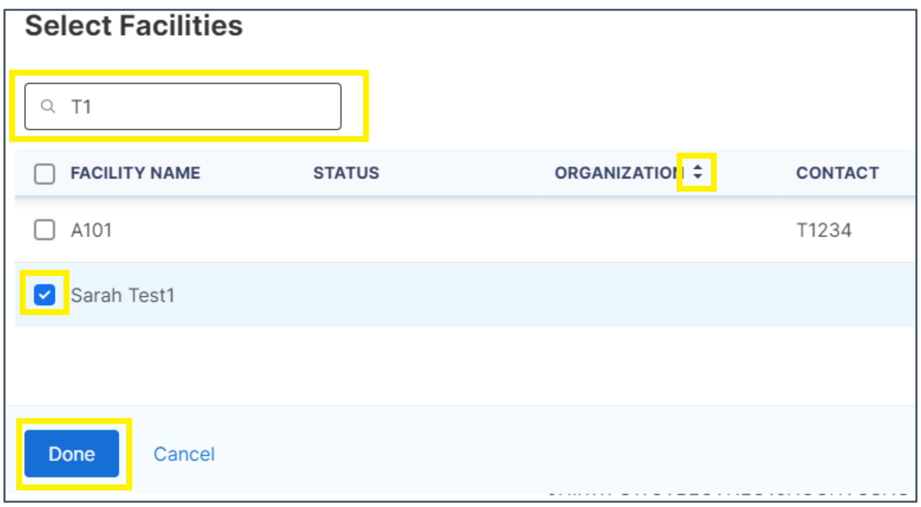

If you wish to remove any Organizations from the Event, you can select the “x” icon next to the Organization name before proceeding.



3. To add Facilities, select the “+” icon next to “Add Facilities”.




Select one or more Facilities that will be associated with the Event you are creating. Only Facilities associated with the Organizations you previously selected will be available. Both Active and Inactive Facilities can be associated to an Event.



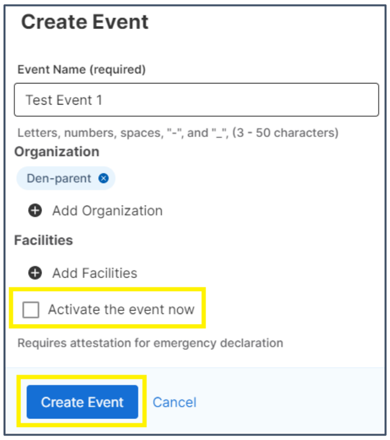

You can search by Facility Name, Organization, and Contact or sort by Organization. Once you have selected the Organizations, select “Done”.

**Note:** Activating an Event does not systematically activate a Facility. Inactive Facilities need to be activated via the Facility Management module.

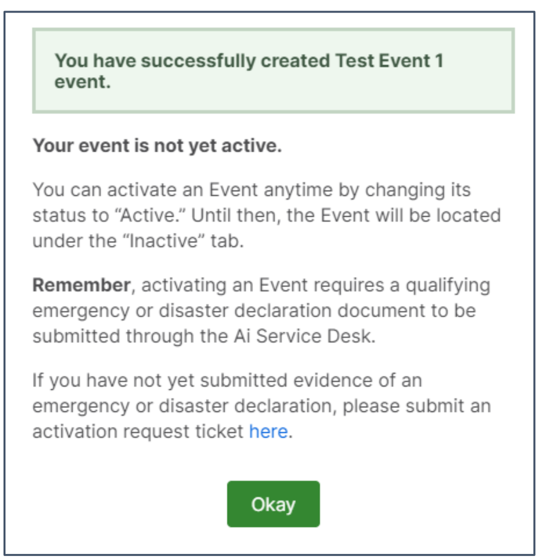
4. An Event may be designated as Active or Inactive upon creation.

***Inactive Event***

To create an Inactive Event, ensure the "Activate the event now" checkbox remains unchecked. After adding Event Name, Organization(s) (optional), and Facilities (optional), select "Create Event".

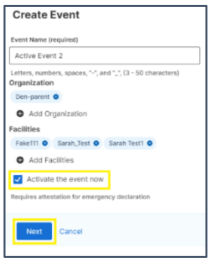



You will receive a confirmation message that your Event has been successfully created. Inactive Events will appear on the Inactive tab of the Event Management Homepage.

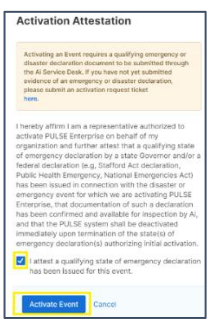


### *Active Event*

To create an Active Event, select the "Activate the event now" checkbox. After adding Event Name, Organization(s) (optional), and Facilities (optional), select "Next". When an Event is Active, all Active Users associated with an Organization included in the Event will be able to log into the system and complete their authorized activities.




If creating an Active Event, you will be required to attest that an appropriate emergency or disaster declaration has been submitted to the Ai Service Desk. If a declaration has been submitted, check the box next to the attestation statement and select "Activate Event".




You will receive a confirmation message that your Event has been successfully created. Active Events will appear on the Active tab of the Event Management Homepage.

**Note:** In order for a User to perform Patient Search or Check-In/Check-Out, an Event must be Active.

## Change Event Status

Once an Event is created, you will be able to manage the status of each Event from the Event Management Homepage.

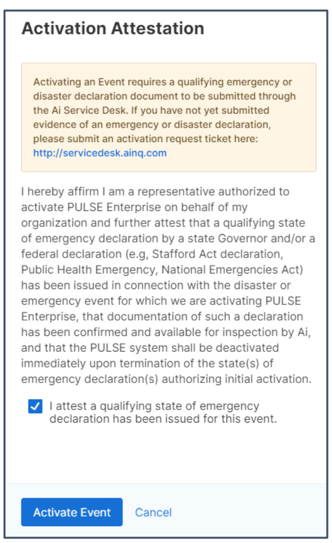
The following status changes are supported:

- **Active → Inactive**

  Active Users in Facilities associated with this Event will systematically be denied access to Patient Search and Emergency Census when this status change is made.

- **Inactive → Active**

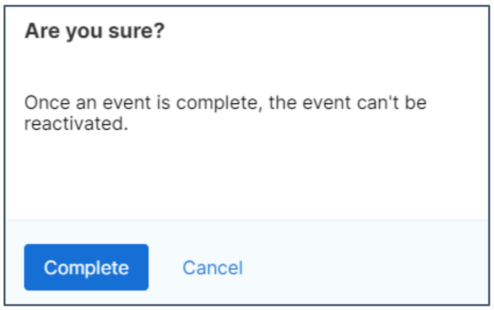
  You will be required to attest that an emergency declaration form has been submitted to the Ai Service Desk.

  Active Users in active Facilities associated with this Event will systematically be given access to Patient Search and/or Emergency Census, depending on their assigned roles, when this status change is made.

- **Active → Completed**

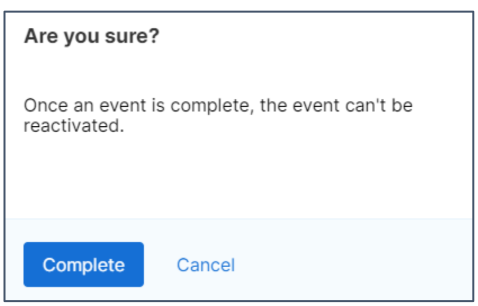
  You will receive a prompt requesting that you confirm this status change. Once an Event is moved to Completed, it cannot be moved back to Active or Inactive. Events should only be moved to Completed when ready to be archived.




  Active Users in Facilities associated with this Event will systematically be denied access to Patient Search and Emergency Census when this status change is made.

- **Inactive → Completed**

  You will receive a prompt requesting that you confirm this status change. Once an Event is moved to Completed, it cannot be moved back to Active or Inactive.




An Event can never be moved from Completed → Active or Completed → Inactive.

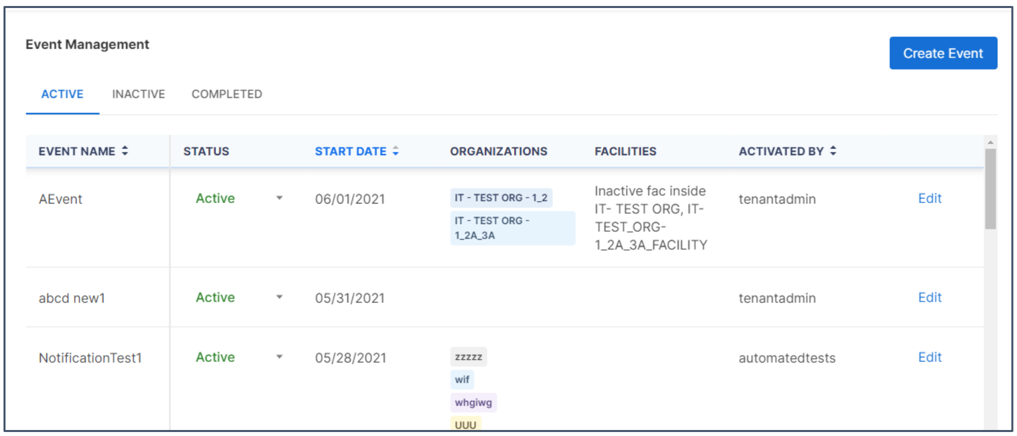
**Tip!** Both the Event and the Facility must be Active in order for an Active End User to be able to access Patient Search and/or Emergency Census.

## View Events

You will be able to view all Active, Inactive, or Completed Events from the Event Management Homepage.

### *Active*

Active Events are default sorted to display the Event with the most recent Start Date/Time on the top of the Homepage.

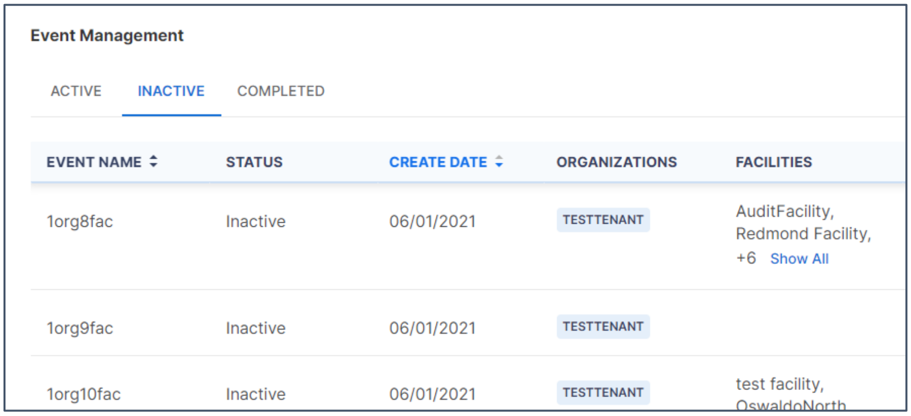



The Start Date will either reflect the date an Active Event was created *or* the date a previously Inactive Event was moved to an Active status.

The most recent Active status date will be displayed if the Event was toggled between Inactive/Active several times.

### *Inactive*

Inactive Events are default sorted to display the Event with the most recent Create Date/Time on the top of the Homepage.

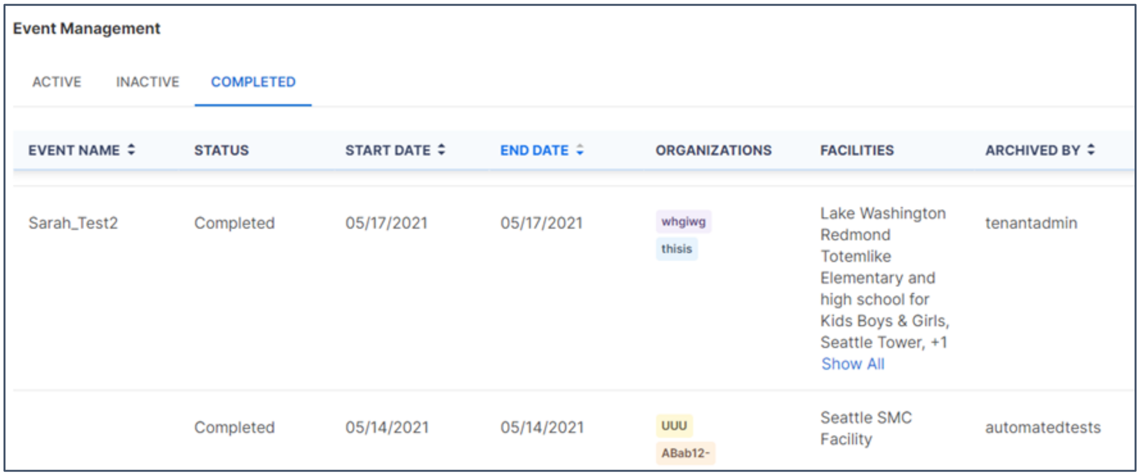



The Create Date will either reflect the date an Inactive Event was created or the date an Active Event was moved to an Inactive status.

The most recent Create Date status date will be displayed if the Event was toggled between Inactive/Active several times.

### *Completed*

Completed Events are default sorted to display the Event with the most recent End Date/Time on the top of the Homepage.




The End Date will reflect the date an Event was moved from Active/Inactive to Completed.

The Start Date will either reflect the date an Active Event was created or the date an Inactive Event was moved to an Active status. The most recent Active status date will be displayed if the Event was toggled between Inactive/Active several times.

## Edit Events

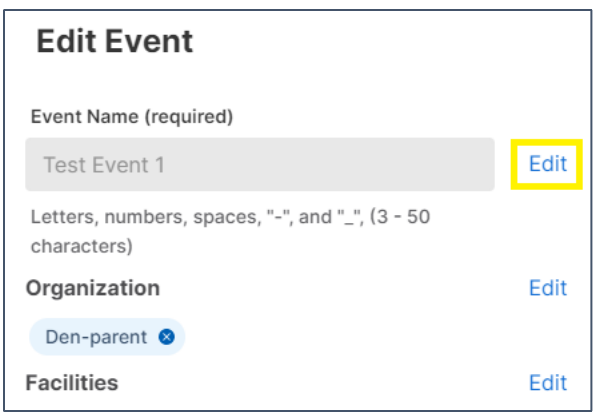
Depending on permissions, you will have the ability to edit an Active or Inactive Event in the following ways:

- Change Event Name
- Add and Remove Organizations
- Add and Remove Facilities

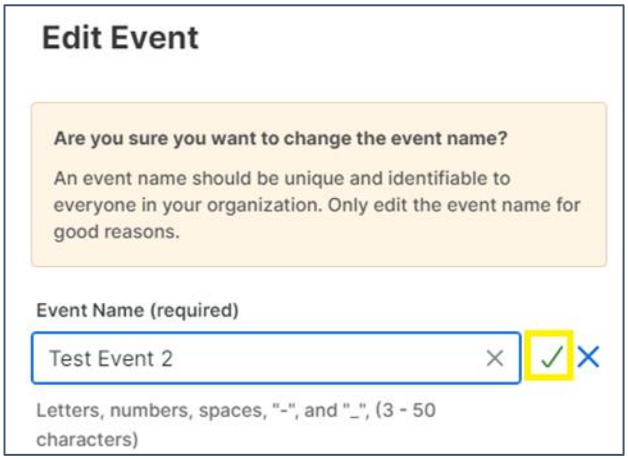
### *Change Event Name*

1. To change the Event name, select “Edit” from the Active or Inactive tab.

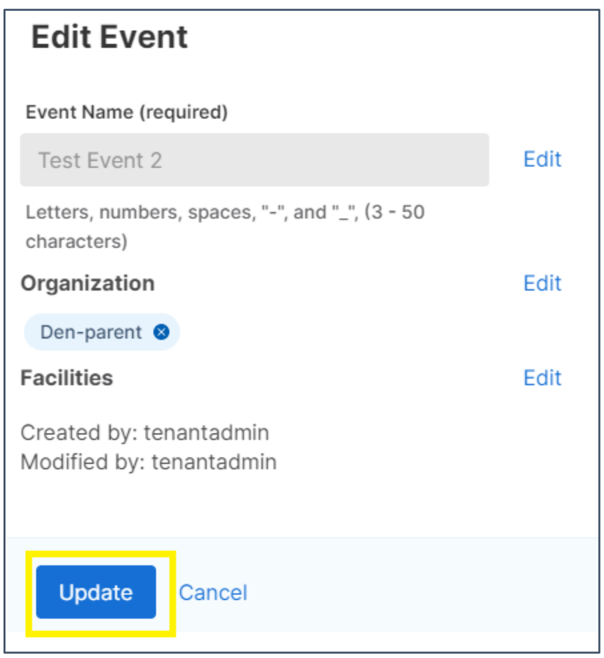

2. Select “Edit” next to the Event Name field.



3. You will receive a message asking if you are sure that you want to change the name of the Event. Changing an Event name changes the Event name for all other Administrators and should not be done without proper communication (if needed).




If you wish to proceed, you will be required to select the green check mark to the right of the Event Name field prior to being able to select "Update".

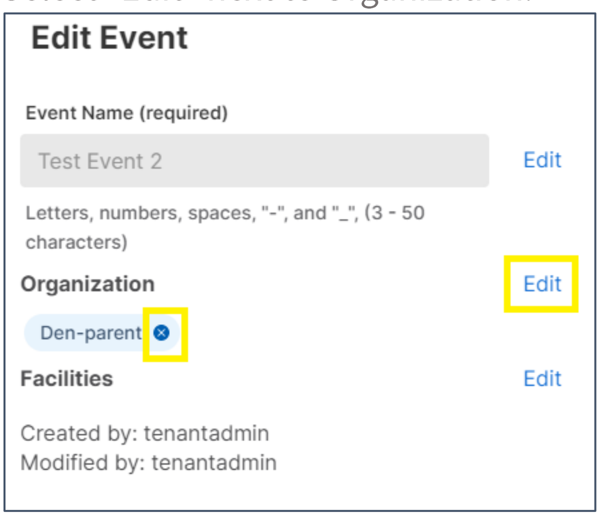


### *Add and Remove Organizations*

Organizations can be added or removed from an Event. Users associated with an Organization will become associated or disassociated with the Events based on this action. Only Users in Organizations that are added to an Event may access Patient Search and/or Emergency Census when that Event is Active.

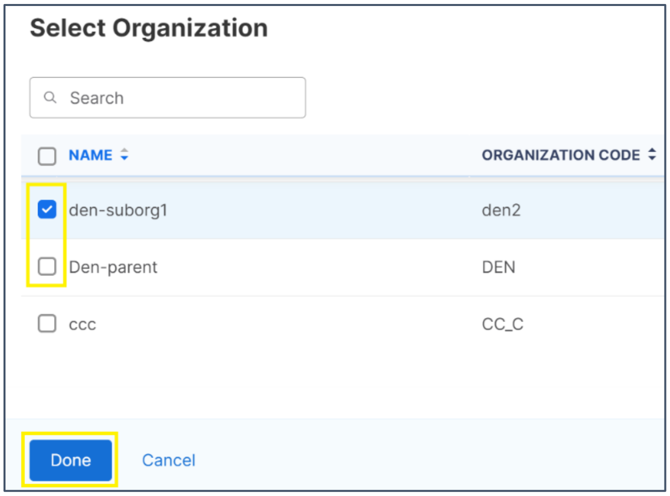
1. To add or remove Organizations, select “Edit” from the Active or Inactive tab for the Event for which you would like to add or remove Organizations.


2. Select “Edit” next to Organization.



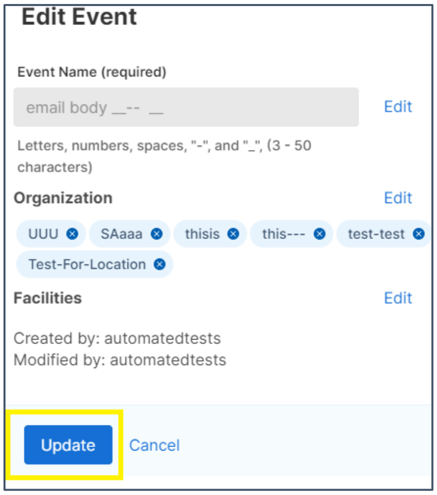

**Tip!** Organizations can be easily removed from the Event by selecting the “x” icon next to the Organization name.

3. If adding an Organization, check the box next to the Organization you wish to add. If removing an Organization, un-check the box next to the Organization you wish to remove. Select "Done".




Removing an Organization will systematically remove all associated Facilities.

4. Select "Update".

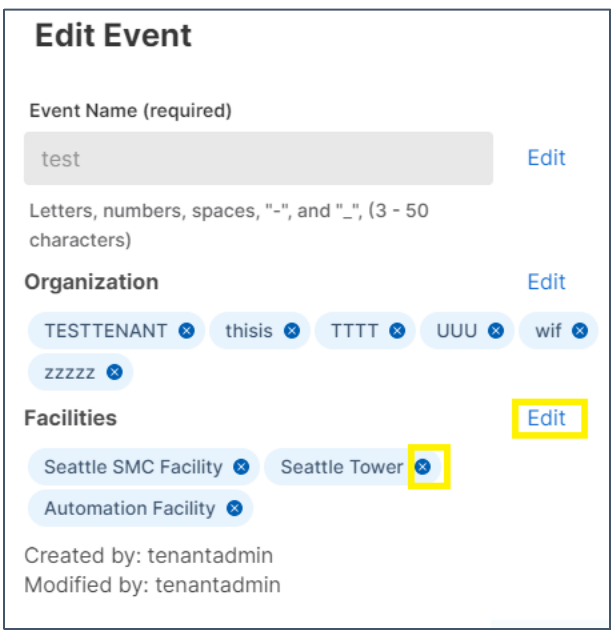


### *Add and Remove Facilities*

You can add or remove Facilities from an Event. Only Facilities added to an Event will be available during ACF selection for Users in the Organization associated with those Facilities.

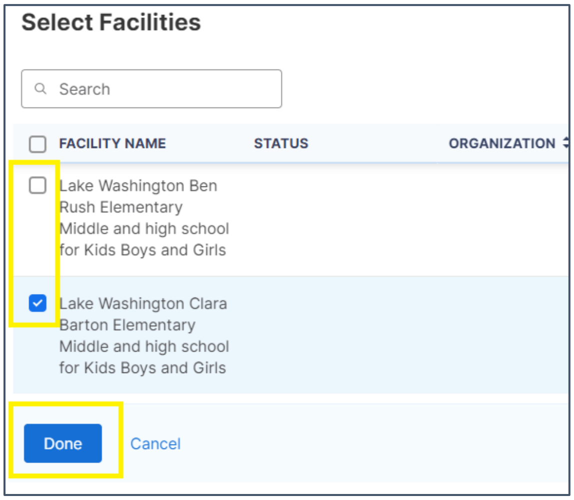
1. To add or remove Facilities, select “Edit” from the Active or Inactive tab.


2. Select “Edit” next to Facilities.



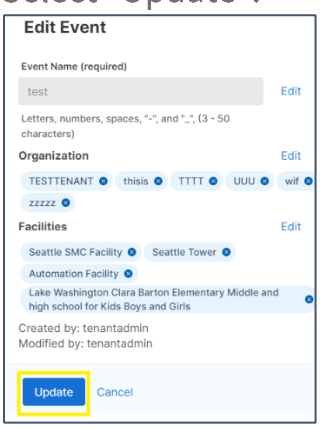

**Tip!** Tenant Administrator and Event Administrators can easily remove Facilities from the Event by selecting the “x” icon next to the Facility name. Organization Administrators will have to select “Edit” to remove Facilities.

3. If adding a Facility, check the box next to the Facility you wish to add. If removing a Facility, un-check the box next to the Facility you wish to remove. Select “Done”.




**Note:** Only Facilities associated with Organizations already associated with the Event will be selectable. If the Facility you are attempting to add is not available, confirm that the Organization is added.

4. Select “Update”.




**Note:** Organization Administrators will only have the ability to Add or Remove Facilities associated to their own Organization.

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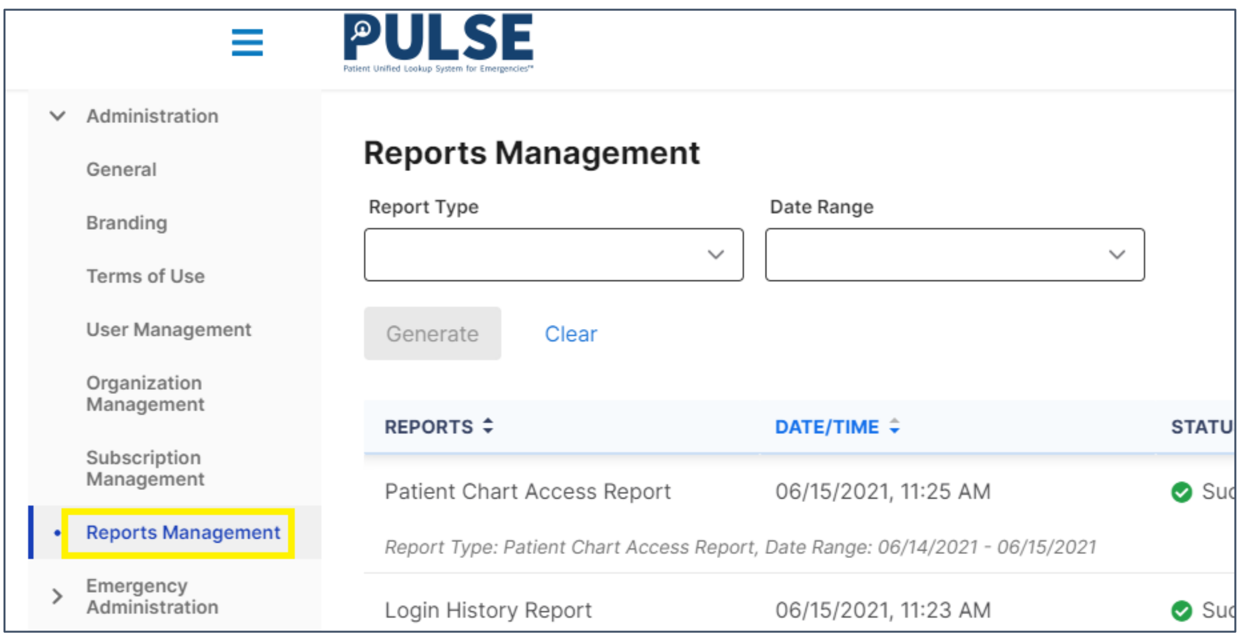
# REPORTS MANAGEMENT

## Reports Management Overview

As a Tenant Administrator or an Auditor, you can run administrative reports that document user activity in the system. Reports are preset with specific fields returned in a downloaded .csv file.

## Reports Management Homepage

Navigate to the Reports Management Homepage from the Tenant Administration section of the Hamburger Menu.




From the Reports Management Homepage you can generate and download reports.

## Login History Report

The Login History Report contains login and logout transaction history of all users for the time period specified. This report tracks the unique ID associated with each user, the user's name, the web browser used to access the application, the unique IP address for the user's computer, and login and logout time stamps. If a user is authenticated through an SSO vendor, there will be a unique ID assigned to the vendor and the login activities through SSO will be tracked. The unique User ID, IdP ID, Session ID assigned by the system allows Ai to investigate further and provide additional information on the login history, e.g. reasons for login failure.

| Column Header | Description |
|---|---|
| User ID | Unique ID that belongs to the End User |
| First Name | User's first name |
| Last Name | User's last name |
| Email Address | User's email address |
| IdP ID | Unique ID that belongs to the SSO vendor |
| IdP Name | Name of the SSO vendor |
| IP Address | Unique identifier for the user's machine |
| Browser | Browser that was used by the user |
| Session ID | Unique ID that belongs to the active user session |
| Login Date Time | Date and time the user logged in, with time zone |
| Event Status | Success or Failure of the user's login attempt to PULSE |
| Logout Date Time | Date and time the user logged out, with time zone |

## Patient Chart Access Report

The Patient Chart Access Report contains all activities of users performed in Patient Search during the time period specified.

Tracked events include Searching for Patient, Patient Selection from Search History, Query for Documents, and Retrieve Documents.

| Column Header | Description |
|---|---|
| User ID | Unique ID assigned to the User |
| User First Name | User's first name |
| User Last Name | User's last name |
| Email ID | User’s email address |
| IP Address | Unique identifier for the user’s machine |
| Browser | Browser that was used by the user |
| Session ID | Unique ID assigned to the active user session |
| Facility ID | Unique ID assigned to the Alternate Care Facility |
| Patient First Name | The first name of the patient returned by the national networks whose documents were viewed by the User |
| Patient Last Name | Similar to Patient First Name |
| Patient Middle Name | Similar to Patient First Name |
| Patient Date of Birth | Similar to Patient First Name |
| Patient Gender | Similar to Patient First Name |
| Patient Address Street | Similar to Patient First Name |
| Patient City | Similar to Patient First Name |
| Patient State | Similar to Patient First Name |
| Patient Zip Code | Similar to Patient First Name |
| Patient Phone | Similar to Patient First Name |
| OID | Unique identifier assigned to the Source (OID) |
| Facility Name | Facility name recorded in the document |

The column headers starting with "Document" (e.g., Document Creation Time, Document Repository Unique ID, etc.) contain metadata from the Document that was retrieved from the national networks. The unique User ID, Session ID, and Facility ID assigned by the system allow Ai to do more advanced auditing and provide additional information for the activity performed by the user.

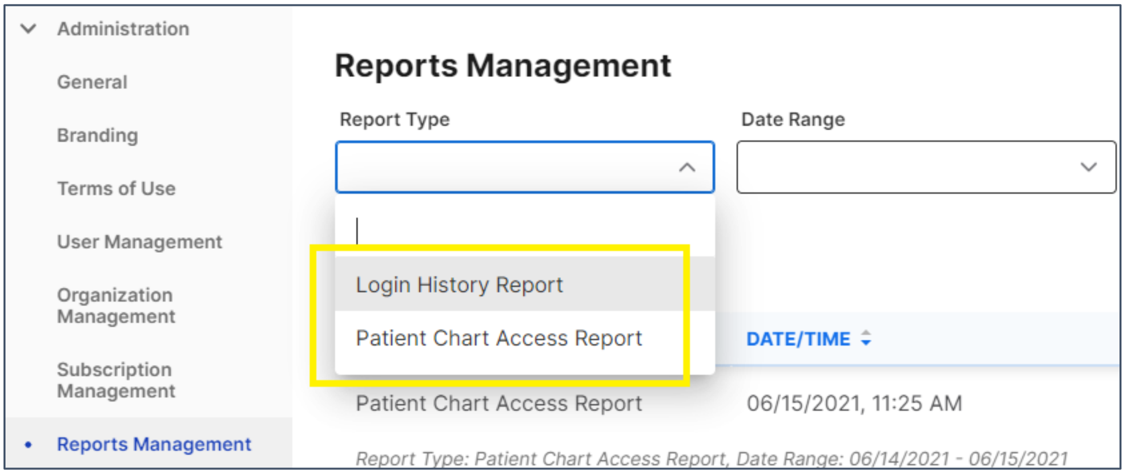
| Column Header | Description |
|---|---|
| Document Creation Time | Date and time of the document was created |
| Document Repository Unique ID | Unique ID assigned to the document by the source |
| Document Service Start Time | Date and time of the service start recorded in the document |
| Document Service Stop Time | Date and time of the service end recorded in the document |
| Document Name | Name or title of the document from the source |
| Document Description | Description of the document from the source |
| Document Author | Author recorded in the document |
| Document Institution | Institution recoded in the document |
| Document Author Role | Author role recorded in the document |
| Document Author Specialty | Author specialty recorded in the document |
| Document Type | Type of document from the source |
| Document Format | Standard format of the document from the source |

There are two types of events, User Activity Event and Backend Activity Event. For each user activity event, there are corresponding backend activity events. The backend activity events are recorded for Ai to do more advanced audit investigations, if requested.

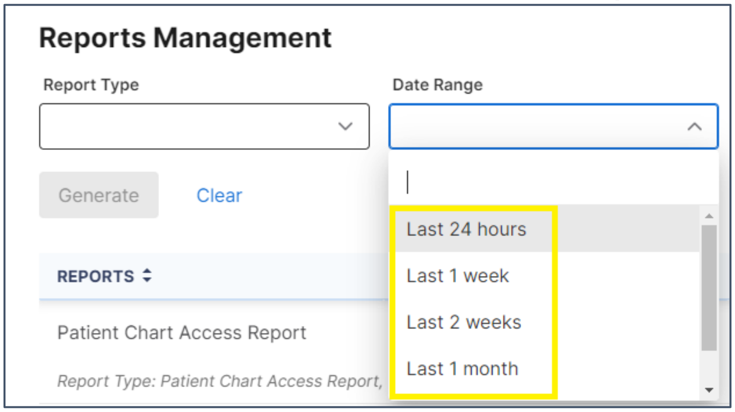
| Column Header | Description |
|---|---|
| Event | There are two types of events, User Activity Event and Backend Activity Event. For each user activity event, there are corresponding backend activity events. The backend activity events are recorded for Ai to do more advanced audit investigations, if requested.<br>User Activity Events:<br>• patientSearch – User performs a Patient Search<br>• queryDocument – User queries a document<br>• retrieveDocument – User retrieves a document<br>Backend Activity Events:<br>• getACFSearchHistory<br>• getPatientDiscoverySearchResults<br>• getQueryDocumentSearchHistory<br>• getQueryDocumentSearchResults<br>• getRetrieveDocumentSearchHistory<br>• getRetrieveDocumentSearchResults |
| Event Time | Date and time of the user accessed the system, with time zone |
| Application Name | The application the user accessed to view patient charts (should always be PULSE Enterprise) |

## Generate a Report

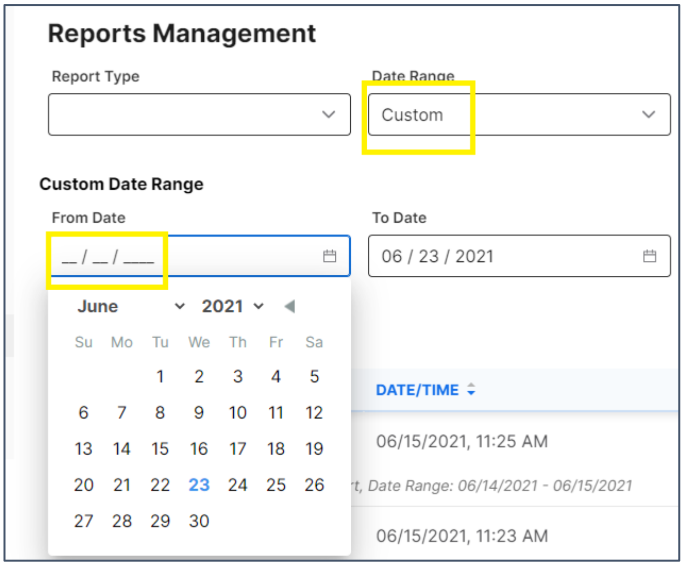
1. Click on Report Type and select a report from the drop- down menu options.



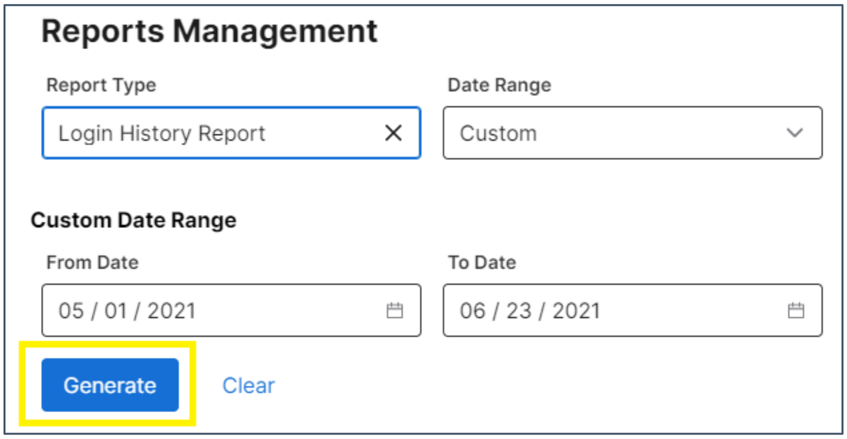

2. Select the time period for the report (e.g., last 24 hours).



3. To create a custom time period, select "Custom" from the drop-down menu. Use the calendar to enter "From Date" and "To Date" by clicking on the dates.




4. Click on "Generate" to produce the report.



5. The generated report will appear in the report list. The report list displays the following information:
   - Report Type and Date Range
   - Date/Time the report was generated
   - Status of the report request (i.e., success or error)
   - Download link to export the report in a .csv file to a local desktop

| REPORTS | DATE/TIME | STATUS | DOWNLOAD |
|---|---|---|---|
| Login History Report<br>*Report Type: Login History Report, Date Range: 05/01/2021 - 06/23/2021* | 06/23/2021, 10:56 AM | Success | Download |
| Patient Chart Access Report<br>*Report Type: Patient Chart Access Report, Date Range: 06/14/2021 - 06/15/2021* | 06/15/2021, 11:25 AM | Success | Download |

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# DATA SOURCES

## National Health Information Networks

PULSE Enterprise connects to National Health Information Networks (e.g., eHealth Exchange). Through PULSE Enterprise, public health and health care practitioners can send a query for "Message Content for Treatment", and participating organizations respond to the query with relevant patient documents which may include health information such as medications, allergies, diagnoses, and lab results.

PULSE Enterprise participates in the eHealth Exchange as a Hub Initiator, meaning that PULSE Enterprise can send queries to other participants on the network, but it does not respond to queries. Simply put, PULSE Enterprise "pulls" information from the eHealth Exchange, but does not "push" information.

PULSE Enterprise can be configured to query different source organizations on the National Health Information Networks depending on your emergency response needs. Source organizations may be located in your state, or may be entities with national coverage, such as the Department of Defense, the Department of Veterans Affairs, Kaiser Permanente, MyDirective, the Social Security Administrator, the Veterans Health Administrator, and Walgreens.

A full listing of participating eHealth Exchange organizations can be found here.

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# LEGAL CONSIDERATIONS

## Legal Considerations

Administrators and End Users must follow all Federal, State, and Local laws. Additionally, all users must follow the below provisions to comply with the eHealth Exchange Data Use and Reciprocal Support Agreement (DURSA) and other applicable agreements.

1. Comply with all Applicable Law
2. Reasonably cooperate with the Subscriber (Audacious Inquiry) on issues related to the DURSA
3. Perform patient searches only for a Permitted Purpose (Appendix B)
4. Use Message Content received from another Subscriber or Subscriber User in accordance with the terms and conditions of the Subscription Order
5. As soon as reasonably practicable after determining that an Adverse Security Event occurred, report such Adverse Security Event to the Subscriber
6. Refrain from disclosing to any other person any passwords or other security measures issued to the User by the Subscriber
7. Upon accepting the PULSE Solutions Terms of Use, you signify that you will comply with these terms

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# APPENDIX A

## PULSE SOLUTIONS TERMS OF USE (for individual Authorized Users)

### PLEASE READ THESE TERMS CAREFULLY BEFORE ACCEPTING.

As a condition of my being granted access to the Audacious Inquiry ("Ai") PULSE Solutions (including PULSE COVID, PULSE Enterprise, and Emergency Census), I agree to be bound by the following terms:

1. I represent that I am either a Subscriber to the applicable PULSE Solutions, or an Authorized User for an organization or entity that is a Subscriber to the applicable PULSE Solutions.
2. I will not disclose my login or password credentials to any other person, including persons within my organization, and will strictly maintain the confidentiality of such credentials.
3. I will use the PULSE Solutions and will use and disclose information obtained through the PULSE Solutions, only as permitted by applicable laws and regulations, and if I am an Authorized User for an organization or entity, only in accordance with the permitted purposes for that organization or entity as specified in its subscription agreement or order.
4. I understand that data obtained through the PULSE Solutions may include Protected Health Information (PHI) and other personally identifiable and sensitive information governed by HIPAA and/or other federal and state privacy laws and regulations, and I will comply with all such laws and regulations in my use of the PULSE Solutions.
5. With respect to queries to be made through the eHealth Exchange, I will comply with the relevant terms and conditions of the DURSA, currently available at [Data Use and Reciprocal Support Agreement (DURSA) - eHealth Exchange].
6. With respect to queries to be made through national networks, I will comply with relevant flow-down terms from those networks as specified in the PULSE Solutions Policies and Procedures, as amended from time to time. This includes without limitation relevant flow-down terms from the Surescripts network with respect to medication history.
7. I acknowledge that Ai or its partners or licensors respectively, retain sole and exclusive rights in the PULSE Solutions, and in any modifications, improvements, and derivative works thereof. I will not (and will not attempt to) reverse assemble, reverse compile, reverse engineer or otherwise translate or decode any PULSE Solutions or any part thereof.
8. If I am an Authorized User for an organization or entity, I acknowledge that I have no greater rights or remedies against the Ai or its partners, licensors, or service providers than are available to that organization or entity.
9. Except as restricted in an applicable agreement between Ai and the organization or entity that I represent, Ai may suspend or terminate my access to the PULSE Solutions at any time and for any reason, including but not limited to my use of the PULSE Solutions for unpermitted purposes or other violations of these Terms of Use.
10. In addition to any disclaimers and limitations specified in the DURSA, I expressly acknowledge that, except to the extent that the following disclaimers and limitations are prohibited or limited by law:

a. THE PULSE SOLUTIONS ARE PROVIDED TO ME “AS IS”. AI AND ITS THIRD-PARTY PARTNERS, LICENSORS, AND PROVIDERS HEREBY DISCLAIM ALL EXPRESS OR IMPLIED WARRANTIES INCLUDING BUT NOT LIMITED TO ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE, NON-INFRINGEMENT AND QUALITY. AI AND ITS THIRD-PARTY PARTNERS, LICENSORS, AND PROVIDERS MAKE NO REPRESENTATIONS OR WARRANTIES REGARDING THE RELIABILITY, AVAILABILITY, TIMELINESS, SUITABILITY, ACCURACY OR COMPLETENESS OF THE SERVICES OR THE RESULTS THAT I OR THE ORGANIZATION OR ENTITY I REPRESENT MAY OBTAIN BY USING THE SERVICES.
b. WITHOUT LIMITING THE GENERALITY OF THE FOREGOING, AI AND ITS PARTNERS, LICENSORS, AND SERVICE PROVIDERS DO NOT REPRESENT OR WARRANT THAT THE OPERATION OR USE OF THE PULSE SOLUTIONS WILL BE TIMELY, UNINTERRUPTED OR ERROR-FREE. IN PARTICULAR, (I) AI DOES NOT WARRANT AGAINST POSSIBLE ERRORS OR MISMATCHES WHEN MATCHING PATIENT IDENTITIES BETWEEN DISPARATE DATA SOURCES. AI DOES NOT WARRANT AGAINST POSSIBLE ERRORS CAUSED BY SELF-PAY PATIENT ENCOUNTERS WITH CUSTOMER AUTHORIZED USERS OR THE RECEIPT AND ROUTING OF SENSITIVE HEALTH DATA SUBJECT TO SPECIAL PROTECTIONS, ALTHOUGH AI WILL USE ITS BEST EFFORTS TO MINIMIZE SUCH ERRORS.
c. NEITHER AI NOR ITS PARTNERS, LICENSORS, OR SERVICE PROVIDERS CONTROLS THETRANSFER OF DATA OVER COMMUNICATIONS FACILITIES, INCLUDING THE INTERNET, AND THAT THE PULSE SOLUTIONS MAY BE SUBJECT TO LIMITATIONS, DELAYS, AND OTHER PROBLEMS INHERENT IN THE USE OF SUCH COMMUNICATIONS FACILITIES. AI IS NOT RESPONSIBLE FOR ANY DELAYS, DELIVERY FAILURES, OR OTHER DAMAGE RESULTING FROM SUCH PROBLEMS.
d. NEITHER AI NOR ITS PARTNERS, LICENSORS, OR SERVICE PROVIDERS WILL BE LIABLE TO ME, UNDER ANY CONTRACT, NEGLIGENCE, STRICT LIABILITY OR OTHER THEORY: (A) FOR ERROR OR INTERRUPTION OF USE, INACCURACY OR COST OF PROCUREMENT OF SUBSTITUTE GOODS, SERVICE OR TECHNOLOGY OR LOSS OF BUSINESS, DATA, PROFITS OR REVENUE; (B) FOR ANY INDIRECT, EXEMPLARY, PUNITIVE, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES; (C) FOR ANY MATTER BEYOND THEIR REASONABLE CONTROL, HOWEVER CAUSED ON ANY THEORY OF LIABILITY, EVEN IF SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.
e. THE CUMULATIVE MAXIMUM LIABILITY OF AI AND ITS PARTNERS, LICENSORS, AND SERVICE PROVIDERS TO ME FOR ANY AND ALL CLAIMS, ACTIONS, PROCEEDINGS, DAMAGES, AND LIABILITIES ARISING IN CONNECTION WITH THE PULSE-COVID SERVICES, REGARDLESS OF THE NUMBER OF OCCURRENCES OR CLAIMS, SHALL BE LIMITED TO THE FEES ACTUALLY PAID BY ME TO AI FOR SUCH SERVICES, AND IF I HAVE PAID NO FEE, THEN TO TEN DOLLARS (USD $10.00)

11. These Terms of Use, together with any terms and conditions agreed by Ai and the organization or entity that I represent that are applicable to its Authorized Users, contains the entire understanding of Ai and me regarding my use of the PULSE Solutions. I acknowledge that Ai may change the Terms of Use for the PULSE Solutions at any time and require me to accept such changed terms upon subsequent login in order to continue using the PULSE Solution.

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# APPENDIX B

## Permitted Purposes

Subscribers and Authorized Users may access and use data through PULSE Enterprise Solutions only for Permitted Purposes, as defined in the applicable Subscription Terms, Terms of Use, and the Policies and Procedures. Permitted Purposes for data use are listed below:

1. For Treatment of an individual.
2. For public health activities and reporting as permitted by Applicable Law, including the HIPAA Regulations at 45 C.F.R. 164.512(b) and (d) and 164.514. See Disclosures for Public Health Activities | HHS.gov and COVID-19 and HIPAA: Disclosures to law enforcement, paramedics, other first responders and public health authorities (hhs.gov).
3. In addition, for so long as HHS's April 2, 2020 "Notification of Enforcement Discretion under HIPAA to Allow Uses and Disclosures of Protected Health Information by Business Associates for Public Health and Health Oversight Activities in Response to COVID-19", Notification of Enforcement Discretion for Business Associates and HIPAA (hhs.gov), remains in force, and provided that Subscriber and its Authorized Users comply with the conditions specified in that Notification, Ai will not consider activities covered by that Notification to be breaches of these Policies and Procedures. Each Subscriber must make its own judgments respecting the contents of that Notification, and this Policy and Procedure does not override any HIPAA requirements or prohibitions, nor assure any Subscriber that it will be exempt from enforcement.
4. For uses and disclosures in connection with a "serious and imminent" threat to the health or safety of a person or the public, to the extent permitted by 45 C.F.R. 164.512(j).
5. With respect to armed forces personnel, for activities deemed necessary by appropriate military command authorities to assure the proper execution of the military mission, to the extent permitted by 45 C.F.R. 164.512(k)(1)(i).
6. For the following subset of Health Care Operations of a Covered Entity, as defined in 45 C.F.R. 164.501 [Definition of "Health care operations", clause (1)]:
   a. Conducting quality assessment and improvement activities, including outcomes evaluation and development of clinical guidelines, provided that the obtaining of generalizable knowledge is not the primary purpose of any studies resulting from such activities;
   b. Patient safety activities (as defined in 42 CFR 3.20);
   c. Population-based activities relating to improving health or reducing health care costs, protocol development
   d. Case management and care coordination,
   e. Contacting of health care providers and patients with information about treatment alternatives; and
   f. Related functions that do not include treatment.

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# APPENDIX C

## Role-Based Access to System Functions

| System Function | Role | | | | | | |
|---|---|---|---|---|---|---|---|
| | Tenant Administrator | Event Administrator | Org Administrator | Org Manager | Auditor | PULSE User | Intake Coordinator |
| **Tenant Administration** | X | | X | X | X | | |
| **Administration** | X | | X | X | | | |
| General | X | | | | | | |
| Branding | X | | | | | | |
| Terms of Use | X | | | | | | |
| User Management | X | | X | X | | | |
| Organization Management | X | | X | X | | | |
| Subscription Management | N/A | | N/A | N/A | N/A | N/A | N/A |
| **Emergency Administration** | X | X | X | X | | | |
| Facility Management | X | | X | X | | | |
| Source Management | X | | | | | | |
| Event Management | X | X | X | | | | |
| View Events | X | X | X | | | | |
| Create Events | X | X | | | | | |
| Change Event Status | X | X | | | | | |
| Edit Event Name | X | X | | | | | |
| Add/Remove Organizations | X | X | | | | | |
| Add/Remove Facilities | X | X | X* | | | | |
| **Reports Management** | X | | | | X | | |
| **Patient Search** | | | | | | X | |
| Patient Search | | | | | | X | |
| **Emergency Census** | | | | | | | X |
| Check-In | | | | | | | X |
| Check-Out | | | | | | | X |
| **Access to Multiple Organizations** | X | X | X | | X | | |

* In Event Management, Org Administrators only have access to Add/Remove Facilities for Events to which their Organization is associated

PULSE ENTERPRISE ADMINSTRATOR USER GUIDE

# REVISION HISTORY

# REVISION HISTORY

| Version # | Description | Date |
|---|---|---|
| 1.0 | PULSE Enterprise Initial Release | 23-Feb-21 |
| 2.0 | Changes reflect new functionality in PULSE Enterprise Release (r2021-04), including Organization Management | 11-Jun-21 |
| 3.0 | Changes reflect new functionality in PULSE Enterprise Release (r2021-07), including Event Management Dashboard renaming from PULSE to Patient Search | 7-Jul-21 |