

Employer Portal Setup

This section describes the settings required for the Employer Portal:

- **Occupational Health Settings** - The Occupational Health Portal settings are configured in eClinicalWorks. The portal administrator must activate their portal login. Once the portal login is activated, then the employer portal can be configured by both portal administrators and practice administrators.

For more information about setting up the Employer Portal, refer to the *Occupational Health User Guide*.

- **Portal Branding Tab** - Configure the images and message that display in the Employer's My Employer Portal from the Portal Branding tab.

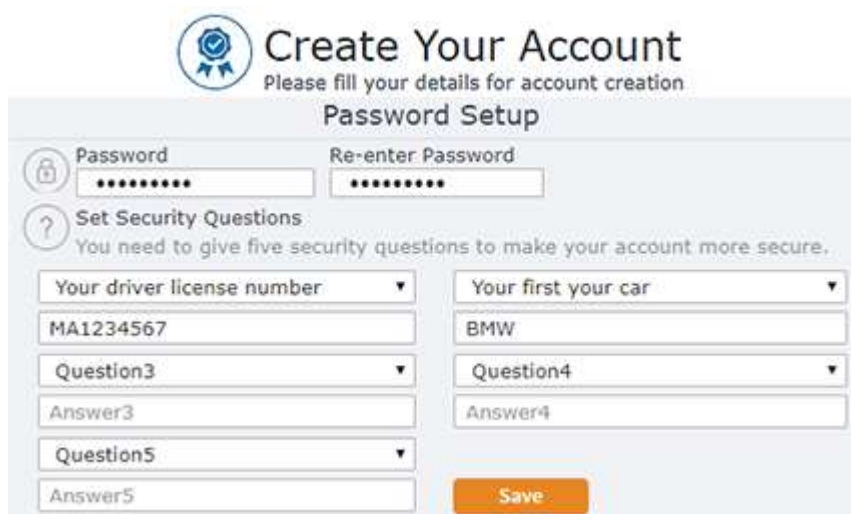
For more information about setting up Employer Portal branding, refer to the *Occupational Health User Guide*.

Create Your Account

Each new portal user receives a welcome-to-portal e-mail. This e-mail provides the user with their Employer Portal username and a verification link. The user must click the verification link to create their Employer Portal account.

To create an Employer Portal account:

1. Click the verification hyperlink in the signup e-mail.
The Create Login window opens.
2. Enter and re-enter a password.
3. Use the *Question1* drop-down list to select a security question:



The screenshot shows a web form titled "Create Your Account" with the subtitle "Please fill your details for account creation". The form is divided into two main sections: "Password Setup" and "Set Security Questions".

Password Setup: This section contains two input fields: "Password" and "Re-enter Password". Both fields are filled with seven asterisks (*****).

Set Security Questions: This section includes a question mark icon and the text "You need to give five security questions to make your account more secure." Below this, there are five rows of questions, each with a dropdown menu for the question and a text input field for the answer.

- Question 1: "Your driver license number" (dropdown) with answer "MA1234567".
- Question 2: "Your first your car" (dropdown) with answer "BMW".
- Question 3: "Question3" (dropdown) with answer "Answer3".
- Question 4: "Question4" (dropdown) with answer "Answer4".
- Question 5: "Question5" (dropdown) with answer "Answer5".

A blue "Save" button is located at the bottom right of the form.

4. Enter the security question's answer in the *Answer* field.

Note: Users must select and answer five security questions.

5. Click *Save*.

The user's account is created and the user is logged in to their Employer Portal.

Note: Users should save the Employer Portal URL to their Web favorites.

Access the Employer Portal



eClinicalWorks suggests saving the Employer Portal Login window to their Google™ Chrome™ Favorites Bar.

Log in to the application to begin working in the Employer Portal.

For more information about logging in, refer to the section [Logging in to the Employer Portal](#).

Logging in to the Employer Portal

Log in to the Employer Portal from the Login Page.

To log in to the Employer Portal:

1. Enter your username.
2. Enter your password.
3. (Optional) If you forget your password, click the *Forgot Your Password?* hyperlink.

A screenshot of the 'My Employer Portal' sign-in page. At the top, it says 'My Employer Portal' with a logo, followed by 'Welcome!' and 'Sign In'. Below this are two input fields: 'Username' with a person icon and 'Password' with a star icon. A large orange 'SIGN IN' button is centered below the fields. At the bottom, there is a red-bordered link that says 'Forgot Your Password?'.

For more information about resetting your password, refer to the section [Resetting a Forgotten Password](#).

4. Click *Sign In*.

The Employer Portal dashboard displays.

Resetting a Forgotten Password

When required, reset your password.

To reset your password:

1. Click the *Forgot Your Password?* hyperlink.
2. Enter your username:



My Employer Portal
Forgot Password?
Please enter your username below and we will send the password reset instruction to your e-mail.

Username

Username 

SEND LINK

3. Click *Send Link*.
4. Log in to your e-mail and access the Reset Password Link e-mail.
5. Click the *Click here to reset password* hyperlink.

The Reset Password window opens.

6. Enter the answer to the displayed security question.
7. Click *Submit*.
8. Enter and re-enter a new password:



 **Reset Password**
Please set your new password

Reset Password

Enter New Password

Re-enter New Password

Re-enter New Password

Submit

9. Click *Submit*.

The password is reset and the Employer Portal dashboard displays.

Employer Portal Overview

The Employer Portal contains a navigation band, dashboard overview, access to user management, and a user-specific drop-down list:

The screenshot shows the 'My Employer Portal' interface. On the left is a dark blue navigation band with icons for 'Dashboard', 'Employee', 'Review Document', 'Appointment', and 'Surveillance'. The main area is a light grey dashboard with a 'DASHBOARD' header. It contains three panels:

- Clinic Appointment Activity:** A gauge chart for 'Feb 2020' showing 'Open - 11' (blue) and 'Total - 12' (orange). It has tabs for 'This Month' and 'This Year'.
- Upcoming Appointments:** A list of three appointments: '03 Feb 2020, 10:15 AM' by Eugster, Morgan; '04 Feb 2020, 09:15 AM' by Ginjupalli, Abhinav; and '05 Feb 2020, 10:15 AM' by Peterson, Jessica. A 'VIEW ALL' button is at the bottom.
- Document Review:** A panel stating 'You have 0 new documents' with a 'REVIEW' button.

 A vertical legend at the bottom left of the dashboard shows 'Open - 11' (blue square) and 'Total - 12' (orange square).

The following table describes the features available from the Employer Portal:

Feature	Description
Gear icon	Click to display the User Management window. For more information about this window, refer to Configuring User Management .
User icon	This feature displays the user's profile picture. Click the drop-down list to access your profile or log out. For more information about the user's My Profile, refer to Editing Your Profile .
Dashboard	For more information about this feature, refer to the Employer Portal Dashboard chapter.
Employee	For more information about this feature, refer to the Employer Portal Employees chapter.
Review Document	For more information about this feature, refer to the Employer Portal Document Review chapter.
Appointment	For more information about this feature, refer to the Employer Portal Appointments chapter.
Health Surveillance	For more information about this feature, refer to the Health Surveillance chapter.

Configuring User Management

From the Employer Portal home page, click the gear icon to display the User Management window. From this window, configure the Employer Portal's users:

The screenshot shows the 'USER MANAGEMENT' interface. At the top right is an 'Add new' button. Below it are four filter fields: 'User Name' (text input), 'User Role' (dropdown menu set to 'All'), 'Web Access' (dropdown menu set to 'All'), and 'Status' (dropdown menu set to 'All'). There are 'clear' and 'filter' buttons. Below the filters are four action buttons: 'activate', 'deactivate', 'edit', and 'delete'. The main area contains a table with columns: Name, User Role, Last Login, Created, Web Access, and Status. The table lists four users: Bryan (HR, Never Logged in), Julie (HR, 03/21/2018 01:48 PM), Katelyn (Benefits Administrator, 03/21/2018 01:59 PM), and Shalini (HR, 03/12/2018 03:19 PM). At the bottom left is a 'No. of Rows' dropdown set to 10, and at the bottom right are navigation arrows and a page number '1'.

The following table describes the features available in the User Management window:

Feature	Description
Add New	Click to add a new user. For more information about this feature, refer to Adding New My Employer Portal Users .
Filters	Users can filter the list of employees displayed in the User Management window by username, user role, web access, and status. Click the <i>Filter</i> button to apply the selected filters, or the <i>Clear</i> button to reset the filters.
Activate	Click to activate the selected user. For more information about this feature, refer to Activating Users in the Employer Portal .
Deactivate	Click to deactivate the selected user. For more information about this feature, refer to Deactivating Users in the Employer Portal .
Edit	Click to edit the selected user. For more information about this feature, refer to Editing Users in the Employer Portal .
Delete	Click to delete the selected user. For more information about this feature, refer to Deleting Users from the Employer Portal .
User-level icon	Point to a user to display the <i>Edit</i> icon.
Navigation	Users can view additional employees in the user management list by using the <i>No. of Rows</i> drop-down list and the <i>Previous</i> and <i>Next</i> arrows.

Adding New My Employer Portal Users

Path: *My Employer Portal > User Management*

When required, add a new user to the Employer Portal from the User Management window.

To add a user:

1. Click *Add New*.
2. Enter the user's information into the available fields:

The 'Add User' form includes the following fields:

- First Name* (text input)
- Middle Initial (text input)
- Last Name* (text input)
- User Role (dropdown menu, currently showing '--- Select ---')
- Web Access (dropdown menu, currently showing '--- Select ---')
- Email Address (text input)
- Mobile (Cell) (text input)
- Work Phone (text input)
- Address (text input)
- City (text input)
- State (dropdown menu, currently showing '--- Select ---')
- Zipcode (text input)
- Status (dropdown menu, currently showing '--- Select ---')

Note: The items displayed in the User Role drop-down list are configured by the practice in eClinicalWorks. Contact the practice administrator for more information.

3. Click *Save*.
 4. From the system-displayed confirmation message, Click *OK*.
- The new user is added to the Employer Portal and will receive a signup e-mail.

Activating Users in the Employer Portal

When required, activate a user in the Employer Portal from the User Management window.

To activate a user:

1. Check the box of a user.
2. Click *Activate*.
3. From the system-displayed confirmation message, click *OK*:

The message box contains the following information:

- User Name:** [Redacted]
- Status:** Activated
- Message:** ** Password delivered to registered email address for activated users
- Action:** OK (button highlighted with a red box)

The selected user is now activated.

Deactivating Users in the Employer Portal

When required, deactivate a user in the Employer Portal from the User Management window.

To deactivate a user:

1. Check the box of a user.
2. Click *Deactivate*.
3. From the system-displayed confirmation message, click *OK*:



A red X displays under that user's *Status* attribute.

Editing Users in the Employer Portal

When required, edit a user in the Employer Portal from the User Management window.

To edit a user:

1. Check the box of a user.
2. Click *Edit*.
The Edit User window opens.
3. Enter the edits into the applicable fields.
4. Click *Save*:

 A screenshot of the "Edit User" form. The form is organized into several rows of input fields.
 - Row 1: "First Name*" (text box with "Katelyn"), "Middle Initial" (text box), "Last Name*" (text box), "User Role" (dropdown menu with "HR" selected).
 - Row 2: "Web Access" (dropdown menu with "Admin" selected), "Email Address" (text box), "Mobile (Cell)" (text box), "Work Phone" (text box with "508-475-0450").
 - Row 3: "Address" (text box), "City" (text box), "State" (dropdown menu with "Select" selected), "Zipcode" (text box).
 - Row 4: "Status" (dropdown menu with "Active" selected), "User ID" (text box), "Last Login" (text box with "12/08/2017 02:58 PM").
 At the bottom right, there are two buttons: "CANCEL" and "Save".

The user's information is updated.

Deleting Users from the Employer Portal

When required, delete a user from the Employer Portal from the User Management window.

To delete a user:

1. Check the box of a user.
2. Click *Delete*.
3. From the system-displayed confirmation message, click *OK*:



The user is no longer listed in the Employer Portal.

Editing Your Profile

Each user profile contains information entered when an administrator added the employee login and additional fields that the user can edit:

 A screenshot of the "My Profile" window. The window title is "My Profile" with a close button (X) in the top right. Below the title bar, there are two tabs: "Demographics Info" (selected) and "Login info". On the left side, there is a circular profile picture placeholder with a red exclamation mark icon next to it. The form contains the following fields:

First Name*	Middle Name	Last Name*
Julie		Blaine
User Role	Status	Employer
HR	Active	ABC Trucking
Email Address*	Mobile (Cell)*	Work Phone
julie@ecw.com		
Address	City	State
		--- Select ---
Zipcode		

 At the bottom right of the window, there are two buttons: "CANCEL" and "Save".

To access the My Profile window:

1. From the Employer Portal home page, click the profile icon:



2. Then, click *Profile*:



The My Profile window opens to the Demographics Info section.

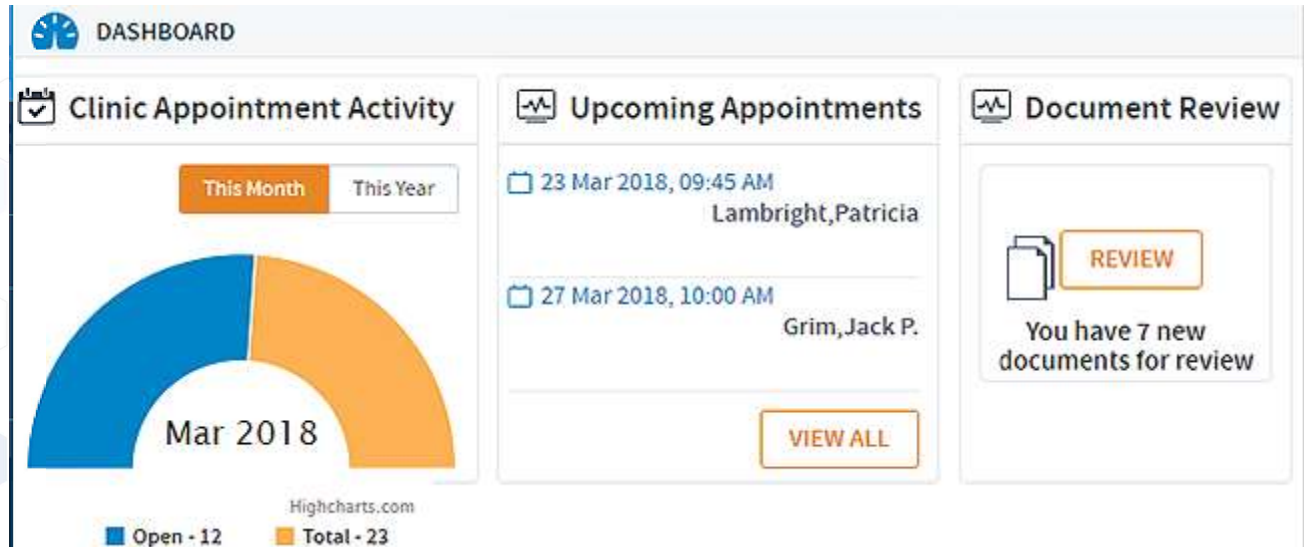
The following table describes the features available in the My Profile window:

Feature	Description
Upload Image	Click the pencil icon, and then select an image to be uploaded as your profile picture.
Demographics Information	Enter any missing, or update existing information.
Login Info	Click this tab to display your login username and the feature to change your password.
Save	Click to save the information in your profile.

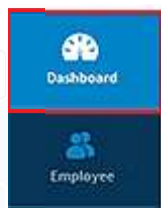
EMPLOYER PORTAL DASHBOARD

Path: *Employer Portal > Dashboard*

The Employer Portal dashboard displays a high-level overview of the clinic's appointment activity, upcoming appointments, and documents in tile-format:



This window displays by default. From another Employer Portal window, click the Dashboard menu item to navigate back to this window:



For more information about each tile, refer to the sections:

- [The Clinic Appointment Activity Tile](#)
- [The Upcoming Appointments Tile](#)
- [The Document Review Tile](#)

The Clinic Appointment Activity Tile

The Clinic Appointment Activity tile displays the number of open appointments against the total number of appointments, by either the current month or year:



Point to the Open or Total segment of the graph to display its percentage.

The Upcoming Appointments Tile

The Upcoming Appointments tile displays upcoming employee appointments. Click *View All* to navigate to the Appointment window:

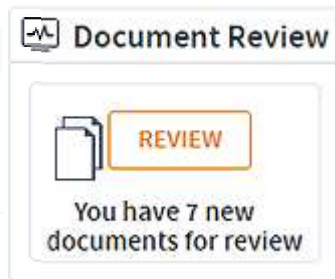


For more information about working in the Appointment window, refer to [Employer Portal Appointments](#).

The Document Review Tile

The Document Review tile displays the number of documents that are pending review and enables the user to launch the Review Documents window.

Click *Review* to launch the Review Documents window:

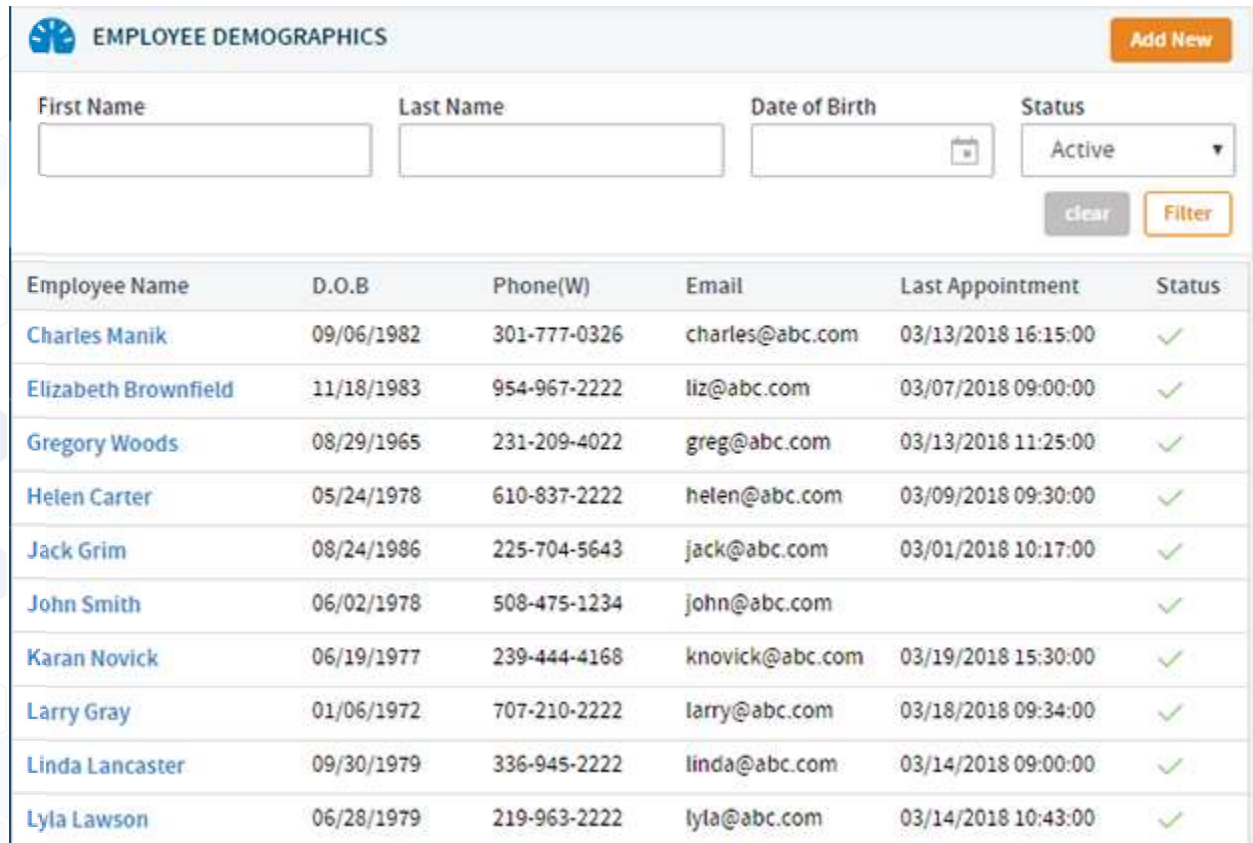


For more information about working in the Review Documents window, refer to [Employer Portal Document Review](#).

EMPLOYER PORTAL EMPLOYEES

Path: *Employer Portal > Employee*

The Employee Demographics window displays the employer's list of employees and enables the user to add new employees to the system:



The screenshot shows the 'EMPLOYEE DEMOGRAPHICS' window. At the top right is an 'Add New' button. Below it are search filters for 'First Name', 'Last Name', 'Date of Birth' (with a calendar icon), and 'Status' (set to 'Active'). There are 'Clear' and 'Filter' buttons. Below the filters is a table with the following data:

Employee Name	D.O.B	Phone(W)	Email	Last Appointment	Status
Charles Manik	09/06/1982	301-777-0326	charles@abc.com	03/13/2018 16:15:00	✓
Elizabeth Brownfield	11/18/1983	954-967-2222	liz@abc.com	03/07/2018 09:00:00	✓
Gregory Woods	08/29/1965	231-209-4022	greg@abc.com	03/13/2018 11:25:00	✓
Helen Carter	05/24/1978	610-837-2222	helen@abc.com	03/09/2018 09:30:00	✓
Jack Grim	08/24/1986	225-704-5643	jack@abc.com	03/01/2018 10:17:00	✓
John Smith	06/02/1978	508-475-1234	john@abc.com		✓
Karan Novick	06/19/1977	239-444-4168	knovick@abc.com	03/19/2018 15:30:00	✓
Larry Gray	01/06/1972	707-210-2222	larry@abc.com	03/18/2018 09:34:00	✓
Linda Lancaster	09/30/1979	336-945-2222	linda@abc.com	03/14/2018 09:00:00	✓
Lyla Lawson	06/28/1979	219-963-2222	lyla@abc.com	03/14/2018 10:43:00	✓

The following table describes the features available in the Employee Demographics window:

Feature	Description
Add New	Click to add a new employee. For more information about employee configuration, refer to the section New Employee Configuration .
Filters	Filter the list of employees by first name, last name, date of birth, and status.
Clear	Click to clear selected filters.
Filter	Click to filter the Employee Demographics window.

Feature	Description
Employees	Click on an employee to display their demographic information, employment history, and their documents and certificates. Point to an employee to display their employee-specific <i>Edit</i> icon. For more information about using this icon, refer to New Employee Configuration .
Rows Per Page	Use the drop-down list to select the number of employees to display in this window.

New Employee Configuration

Path: *Employer Portal* > *Employee*

Add new employees to the employer's list of employees when required. These employees then display as patients in the eClinicalWorks® software.

To add a new employee:

1. Click *Add New*.
2. Complete the Demographics section of the New Employee window:

The screenshot shows the 'New Employee' window with the 'Demographics' tab selected. The form includes the following fields and options:

- First Name***: Text input field
- Middle Name**: Text input field
- Last Name***: Text input field
- Date of Birth***: Date picker and 'Age - Yrs.' field
- Gender***: Radio buttons for Male (selected) and Female
- Address Line 1**: Text input field
- Address Line 2**: Text input field
- City**: Text input field
- State***: Dropdown menu (Set to 'Select')
- Country***: Dropdown menu (Set to 'UNITED STATES')
- Zipcode**: Text input field
- Work Email Address**: Text input field
- Personal Email Address**: Text input field
- Work Phone**: Text input field
- Home Phone**: Text input field
- Mobile (Cell)**: Text input field
- Social Security Number**: Text input field
- Web Enabled***: Radio buttons for Yes and No (No is selected)
- Status**: Dropdown menu (Set to 'Active')
- Release of Information**: Dropdown menu (Set to 'Yes')

3. Click *Next*.

- Complete the Employment History section of the New Employee window:

- Click *Add*.
The employment history displays in the Employment History list.
- Click *Next*.
- Check the applicable boxes of each Health Surveillance screening required for the employee:

Surveillance	Status	Next Test	Next Due
<input checked="" type="checkbox"/> Audiometry	HS Required	-	-

Note: Required screenings are generally based on the employee’s role.

- Click *Save*.
The system displays a message confirming the employee was created successfully.
- Click *OK*.

EMPLOYER PORTAL DOCUMENT REVIEW

Path: *Employer Portal > Review Document*

The number represents the number of documents that need to be reviewed.

Review employee documents in the Review Documents window. The list of documents displayed is imported from the practice-configured Occupational Health Settings folder.

The following image and table describe the features available in the Review Documents window:

Priority	Date	Employee Name	Document Name	Status
	03/13/2018	Gray,Larry	NEW MCSA 5875_03132018_113354	Open
	03/13/2018	Lawson,Lyla J.	NEW MCSA 5875_03132018_112551	Open
	03/07/2018	Lancaster,Linda	Medical Exam Report	Open
	03/06/2018	Lambright,Patricia	NEW MCSA 5875_03062018_153616	Open
	03/05/2018	Grim,Jack P.	MCSA 5875 Medical Examination Report_03052018_141738	Open
	03/05/2018	Manik,Charles	MCSA 5875 Medical Examination Report_03052018_140825	Open
	03/05/2018	Manik,Charles	NEW MCSA 5875_03052018_141541	Open

Feature	Description
Status filters	Select a <i>Status</i> radio button to determine which documents display. Check the <i>Show High Priority Only</i> box to display the high-priority documents that need to be reviewed.
Documents	Documents display with their date, employee name, document name, and status. A visual indicator displays next to high-priority documents. Click the document name to open the Review Document window. For more information about working in the Review Document window, refer to the section The Review Document Window .

Feature	Description
No. of Rows	Use the drop-down list to configure the number of rows that display in the Review Documents window.
Navigation Arrows	Click the <i>Previous</i> or <i>Next</i> arrow to display additional documents for review.

The Review Document Window

The Review Document window displays the selected document for review as well as the document's name, the employee's name, the employee's date of birth, the document's priority, the date the document was uploaded to the Employer Portal, and an editable description field.

Reviewed documents also display the name of the user who marked the document as *Reviewed* with the date and time.

To mark a document as reviewed:

1. Open a document to be reviewed.
2. Review the document.
3. Click *Mark The Document Review*:

Review Document
✕

Document Name:
Medical Exam Report

Employee Name:
Lancaster, Linda

DOB:
09/30/1979

Priority:
Normal

Uploaded Date:
03/07/2018

Description:

Form MCSA-5875 (Revised: 12/09/2015) OMB No. 2126-0006 Expiration Date: 8/31/2018

Public Burden Statement
A Federal agency may not conduct or sponsor, and a person is not required to respond to, nor shall a person be subject to a penalty for failure to comply with a collection of information subject to the requirements of the Paperwork Reduction Act unless that collection of information displays a valid OMB Control Number. The OMB Control Number for this information collection is 2126-0006. Public reporting for this collection of information is estimated to average approximately 25 minutes per response, including the time for reviewing instructions, gathering the data needed, and completing and reviewing the collection of information. All responses to this collection of information are mandatory. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to Information Collection Clearance Office, Federal Motor Carrier Safety Administration, MC-804, 1200 New Jersey Avenue, SE, Washington, DC 20020.

**U.S. Department of Transportation
Federal Motor Carrier
Safety Administration**

Medical Examination Report Form
(for Commercial Driver Medical Certification)

PRIVACY ACT STATEMENT: This statement is provided pursuant to the Privacy Act of 1974, 5 U.S.C. § 552a.

AUTHORITY: Title 49, United States Code (USC), 49 USC 31133(a)(3) and 31149(c)(1)(B).

PURPOSE: To record results of a driver's physical examination, to determine qualification to operate a commercial motor vehicle (CMV), and to promote driver health in interstate commerce according to the requirements in 49 CFR 393.41-49. Providing this information is mandatory. If this information is not provided, the medical examiner will not be able to determine qualification to operate a CMV in interstate commerce according to the requirements in 49 CFR 393.41-49. To record results of a driver's physical examination and to determine qualification to operate a CMV in intrastate commerce when the driver is required by a State to be examined by a medical examiner listed on the National Registry of Certified Medical Examiners in accordance with the provisions of 49 CFR 393.41-49 and any variances from the physical qualification standards adopted by such State.

Medical examiners are required to complete the Medical Examination Report Form for every driver physical examination performed in accordance with 49 CFR 393.41. Each original (paper or electronic) completed Medical Examination Report Form must be retained on file at the office of the medical examiner for at least 3 years from the date of examination. The medical examiner must make all records and information in these files available to an authorized representative of FMCSA or an authorized Federal, State, or local enforcement agency representative, within 48 hours after the request is made 49 CFR 393.43(f).

ROUTINE USES: The information is used for the purpose set forth above and may be forwarded to Federal, State, or local law enforcement agencies for their use. Medical Examination Report Forms collected by FMCSA will be stored in FMCSA's automated National Registry of Certified Medical Examiners System and will be used to monitor the performance of medical examiners listed on the National Registry.

In addition to those disclosures permitted under 5 U.S.C. 552a(b) of the Privacy Act of 1974, additional disclosures may be made in accordance with the U.S. Department of Transportation (DOT) Prefatory Statement of General Routine Uses published in the Federal Register on December 29, 2010 (75 FR 82133), under "Prefatory Statement of General Routine Uses" (available at <http://www.dot.gov/privacy/privacystatements>).

ACKNOWLEDGMENT: I understand the provisions of the Privacy Act of 1974 as related to me through the above-mentioned statement.

Driver's Signature: _____ Date: _____

Close
Mark The Document Review

The document is reviewed, and the *Reviewed By* and *Reviewed Date* fields display.