PointClickCare®

Administrator

Guide

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As an Administrator, 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

Your specific administrative permissions will be determined by the type of Administrator account you have been given.

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1 Who Will Use This Guide?

As an Administrator, 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

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1.1 Roles

Administrator Roles

System Administrator: this role is the primary administrator role and can manage all users, organizations, and events.

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

Organization Administrator: This role can add and remove their own locations and facilities to an event their organization is associated with. This role can also create subordinate Organizations, and manage the Users, Facilities, and Locations in their own Organizations and any subordinate 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 Roles

Patient Search 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.

Emergency Census User: 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.

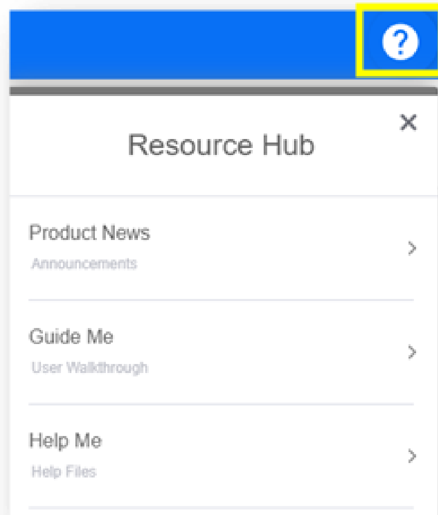
Missing Persons User: this role can access the Missing Persons application to upload search lists and generate missing persons reports.

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

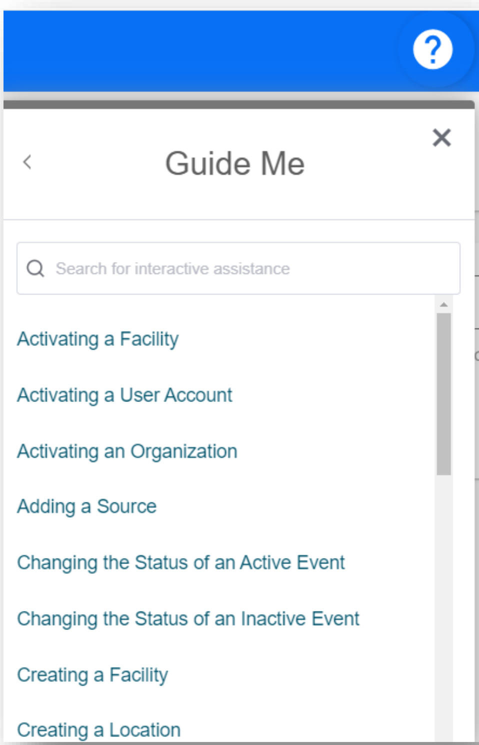
2 Resource Hub

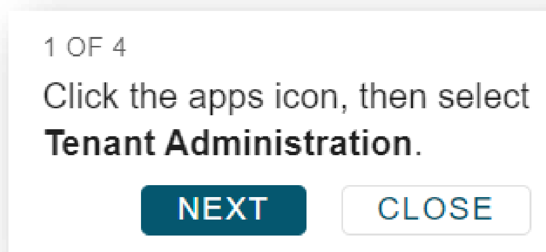
The Resource Hub can be accessed by clicking on the question mark icon in the page header and contains "**Guide Me**" User Walkthroughs and "**Help Me**" Quick Start Guides.

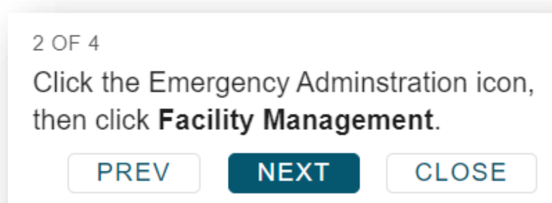
The options displayed when a User clicks through the Resource Hub will depend on the page from which the User is accessing it and the roles assigned to the user.



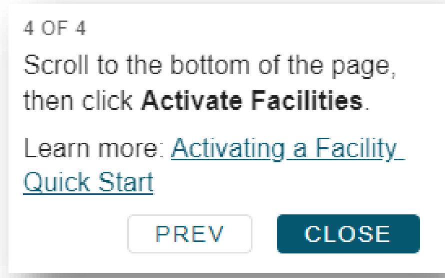
"**Guide Me**" User Walkthroughs provide step-by-step instructions for Administrators on the bottom-right corner of the page



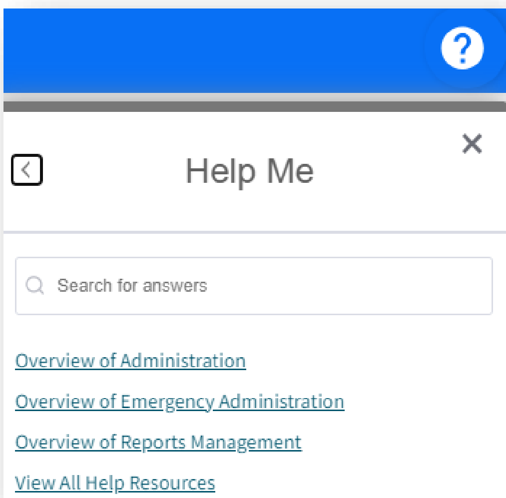


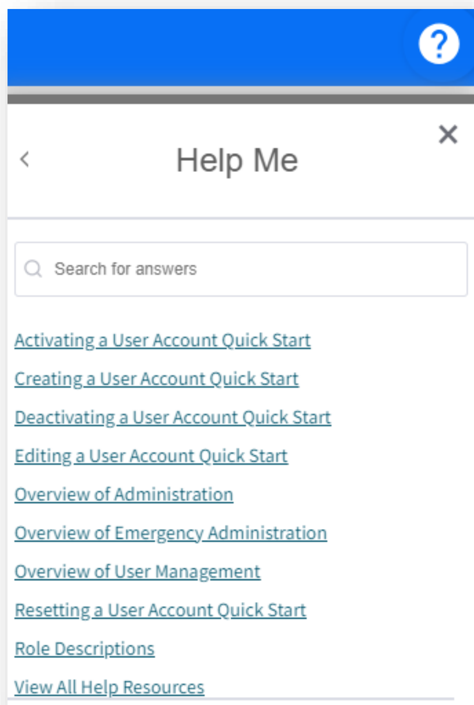


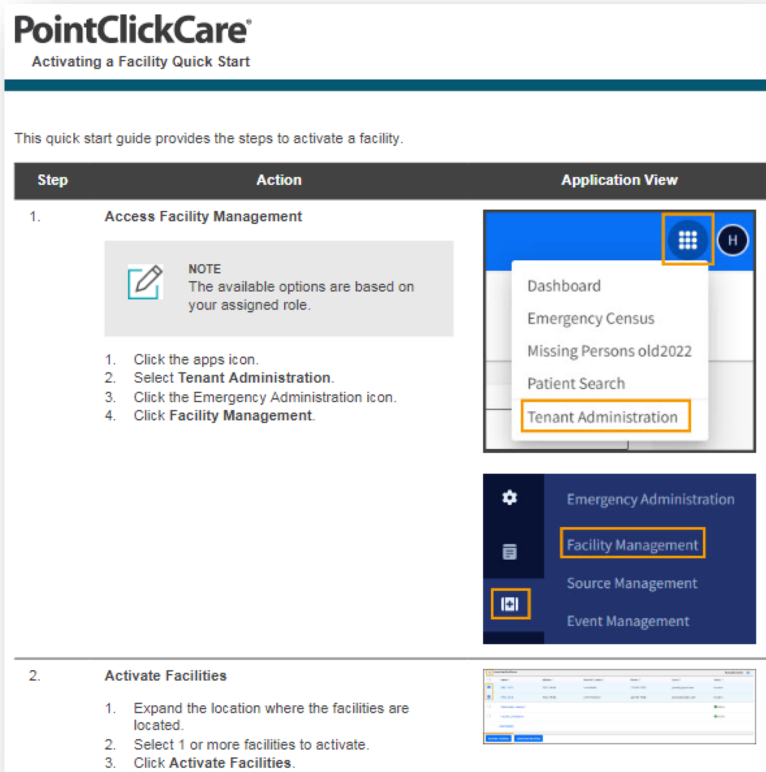
At the end of the instructions, a link to the "**Help Me**" Quick Start Guide is also provided.



"**Help Me**" Quick Start Guides display the steps to complete a function on a linked pdf







PointClickCare
Activating a Facility Quick Start

This quick start guide provides the steps to activate a facility.

Step	Action	Application View
1.	**Access Facility Management** NOTE The available options are based on your assigned role. 1. Click the apps icon. 2. Select **Tenant Administration**. 3. Click the Emergency Administration icon. 4. Click **Facility Management**.	Dashboard Emergency Census Missing Persons old2022 Patient Search Tenant Administration Emergency Administration Facility Management Source Management Event Management
2.	**Activate Facilities** 1. Expand the location where the facilities are located. 2. Select 1 or more facilities to activate. 3. Click **Activate Facilities**.	

Note: Users and Administrators will have to enter an email address on the landing page before accessing Quick Start Guides.

3 User Access

3.1 First Time Login

To be granted access, an Administrator or PointClickCare support staff member must create a user account for you that is associated with an active Organization (for more information and guidance, see section 5.6 (Activate an Organization)). There are two environments: STAGE, which is used for training, and PRODUCTION, which is used for actual response. The steps for access are the same for both environments, though your system administrator may restrict access, particularly when the PRODUCTION site is not activated for a response.

During onboarding, your Executive Sponsor will identify at least one Administrator and PointClickCare will provision user credentials for that/those user(s). Administrators are then able to create accounts for other Administrators and Users .

You will receive an email with a link to create a password similar to the below:

> Your [**ORGANIZATION**] account has been created; your username is [username]. To log in, click the link [link] and complete the steps to finish setting up your account.
> If the link above is not clickable, please copy and paste the URL into your 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 [link] to receive a new link.
> Sincerely,
> The Team at [**ORGANIZATION**]

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. The link is only valid for an hour. If the link expires, follow the process in section 3.2.

Create a password, noting requirements:

> Passwords should include a minimum of 10 character(s). In addition, it must include a combination of at least 4 letters and numbers, a minimum of 1 lowercase letter, 1 uppercase letter, 1 number and 1 symbol.

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

You will then be directed to the Terms of Use (also available in Appendix A). To navigate to the next page, select the “I Agree” button at the bottom of the page.

You will be required to re-review and agree to the Terms of Use if your account gets reactivated after being inactivated or when the Terms of Use language has been updated by PointClickCare or your Administrator.

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” 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

3.2 Password Reset

To reset a forgotten password, navigate to the homepage.

Select the “Forgot Password” button on the login screen.

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

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

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 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). When finished, select "Submit."

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

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

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 your Administrator for assistance.

3.3 Password Expiration

Passwords for users with an Administrator roles will expire after 90 days.

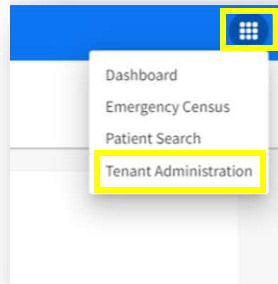
Passwords for all other users will expire after 60 days.

Users in an active Organization will receive emails starting seven days prior to expiration. Once the password expires, the users will not be able to login until the password is reset by clicking the "forgot password" workflow.

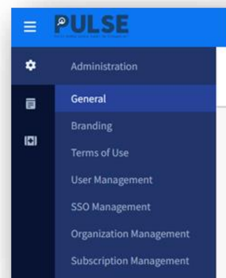
Best Practice: Users will be unable to log-in and reset their passwords if their individual account has been intentionally moved to "inactive" status by an administrator. Users will also not be able to log-in and reset their passwords if they are associated with an organization that is in an "inactive" status. PointClickCare recommends that Organizations be kept in "active" status; Administrators can deactivate Events to remove access for all users (see section 9.3 (Change Event Status) for more information).

4 Administration Overview

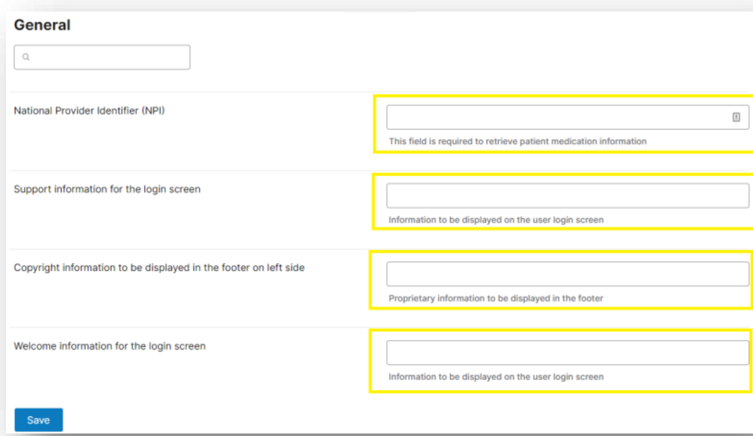
To access the Administrator Dashboard once logged in, select "Tenant Administration" from the apps icon ("Waffle Menu") in the upper-right corner of the screen.



You will then be able to expand a menu on the left side of the screen showing various options based on the permissions you have been granted.



4.1 General



NPI: To enable Medication History functionality for Patient Search 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 Patient Search User. Alternatively, an NPI can be entered for each individual Organization within the Organization Management module (see section 5.3 (Organization National Provider Identifier (NPI))). An Organization's NPI, if entered, will override the Tenant NPI for Uses associated with that Organization. If an Organization does not have an NPI, but one is applied at the tenant level, Patient Search Users will be able to search for medications.

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: PointClickCare 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 Customer Success Executive at PointClickCare 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.

4.2 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 PointClickCare during implementation.

4.3 Terms of Use

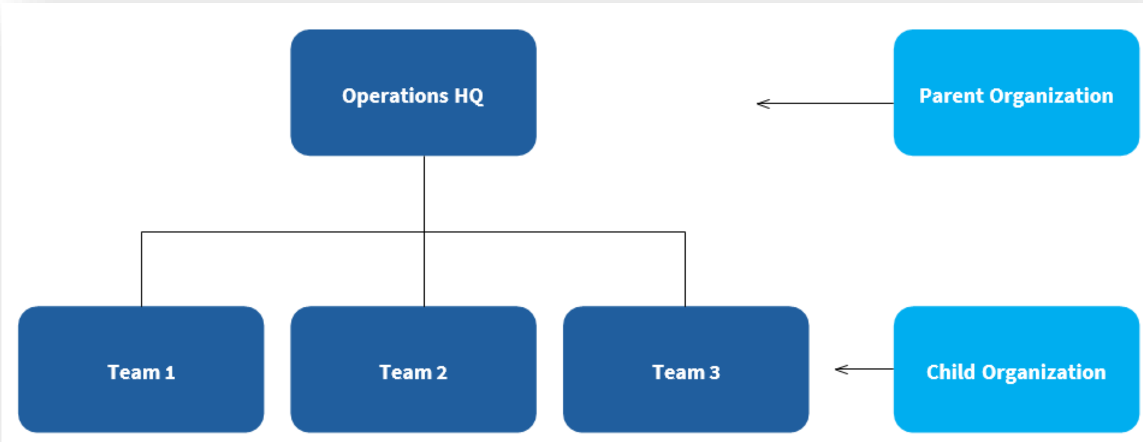
By default, the Terms of Use language mirrors what is included in your legal agreement. If you want to update or add to the Terms of Use information, please discuss with your Customer Success Executive at PointClickCare before making any changes.

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.

5 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 must also be added to an Event for Users in that Organization to use Missing Persons, though Missing Persons does not require facility-level information.
- 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 section 6 (User Management).Organization Administrators can:

- Assign specific Users to their own 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
- Create child or subordinate organizations (Sub-Orgs) and perform all above tasks for those organizations

5.1 Organization Management Homepage

You can access Organization Management by navigating to the Organization Management Homepage from the Administration section of the navigation 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.
- DEA: this should always be blank; functionality not utilized for this product.
- Active Users: the total number of active users associated with that Organization.
- Active Sub-orgs: the number of active subordinate Organizations that have been created underneath that Organization.

- Active Subscriptions: this will always be zero (0); functionality not utilized for this product.
- From the Organization Management Homepage you can:
    - Add a New Organization (section 5.2)
    - Search for and Sort Existing Organizations (section 5.4)
    - Update an Organization (section 5.5)
    - Activate an Organization (section 5.6)
    - Deactivate an Organization (section 5.7)

5.2 Add a New Organization

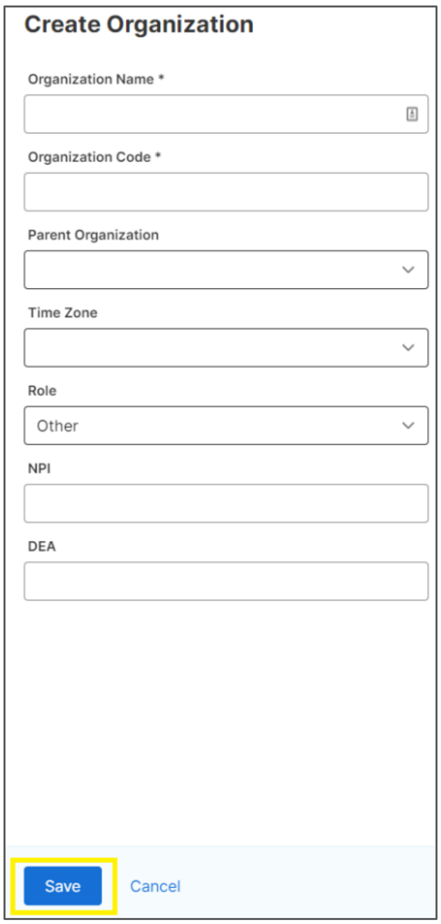
A System Administrator can add a new Organization or sub- Organization anywhere within the system. An Organization Administrator can create a new sub-Organization under their own Organization or an existing sub-Organization that they administer. Organization Managers cannot create new Organizations.

- To create a new Organization, select the "Add Organization" button.
- 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 to reuse an existing Name or Code.

Tip! Be sure to check that the organization you are creating is in the correct hierarchy

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

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.

5.3 Organization National Provider Identifier (NPI)

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

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

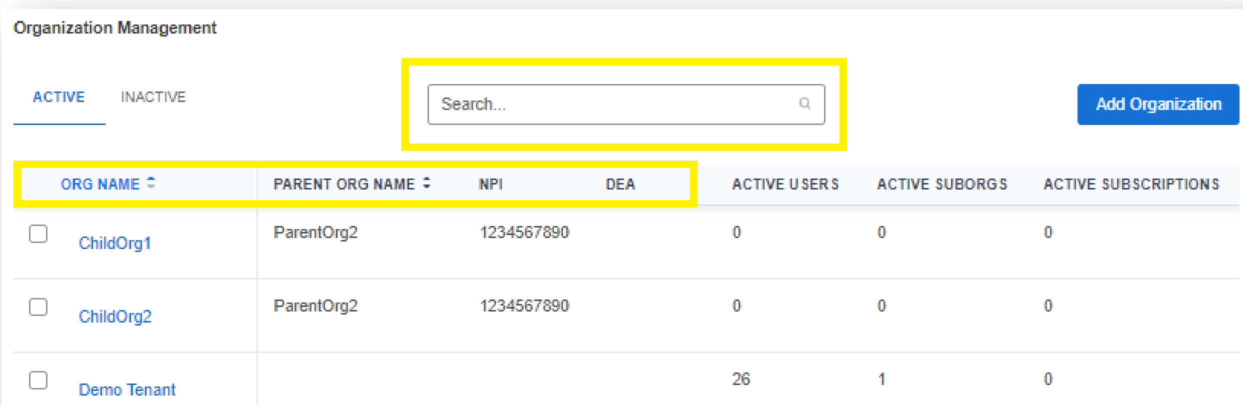
The same NPI may be used by one or more Organizations. However, if an Organization NPI is shared across Organizations (e.g., by an Organization and its sub-Organizations or across two unrelated Organizations), the NPI must be separately entered for each.

Note: If an NPI is not entered for an Organization, the Tenant NPI under General settings will be used when querying for Medication History data in Patient Search.

5.4 Search For and Sort Organizations

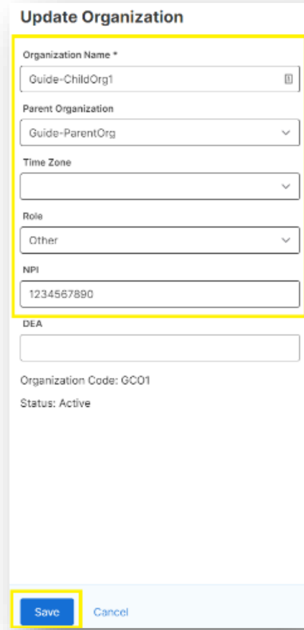
To search within the Organization Management Homepage, type your keyword in the “Search” box at the top of the page. This searches the content of all entries in the Org Name, Parent Org Name, and NPI fields. The default view is set to Active Organizations. For more information, see section 5.6: Activate an Organization

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.



5.5 Update an Organization

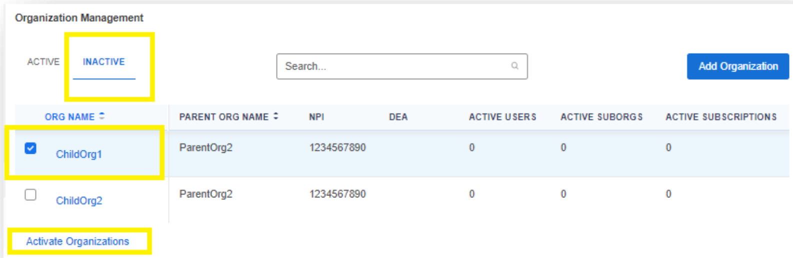
An Administrator can update any Organization that they have permissions to view in the system.



- On the Organization Management Homepage, select the name of the existing Organization by clicking on the hyperlinked Organization Name.
- 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 blank' DEA number can also be edited but is not relevant for the system and can remain blank.
- Click "Save" when you are finished completing updates to implement your changes and return to the Organization Management Homepage.

5.6 Activate an Organization

- Toggle to "Inactive" at the top of the Organization Management Homepage to view Organizations that can be activated. Organizations must be active for its users to log in or for the Organization to be added to an Event.

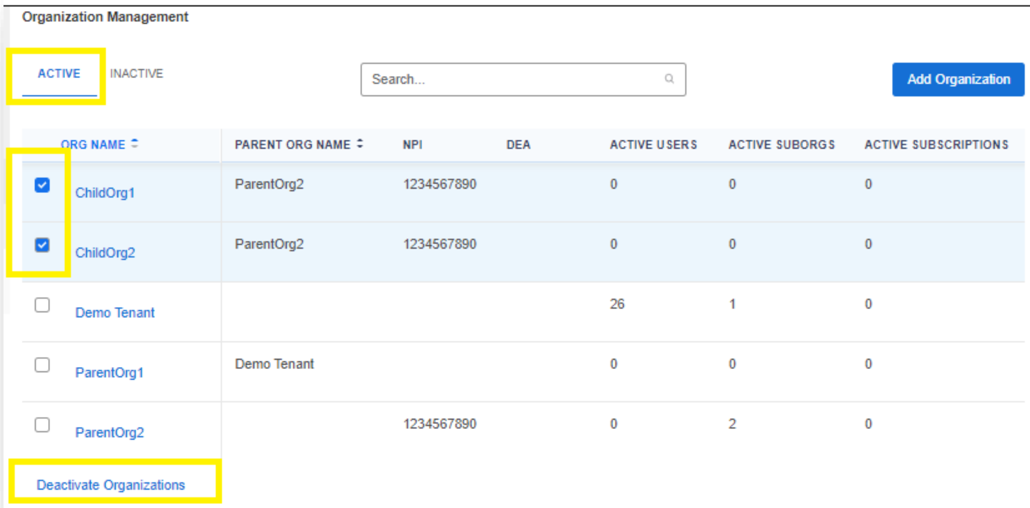


- Select the checkmark next to one or more Organizations you want to activate.
- Select “Activate Organizations” at bottom of screen.
- You will be asked to confirm that you would like to activate the Organization by selecting “Activate” in the pop-up box.

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

5.7 Deactivate an Organization

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



- Select the checkmark next to one or more Organizations you want to deactivate.
- Select the “Deactivate Organizations” at bottom of screen.
- You will be asked to confirm that you would like to deactivate the Organization(s) by selecting “Deactivate” in the pop-up box.

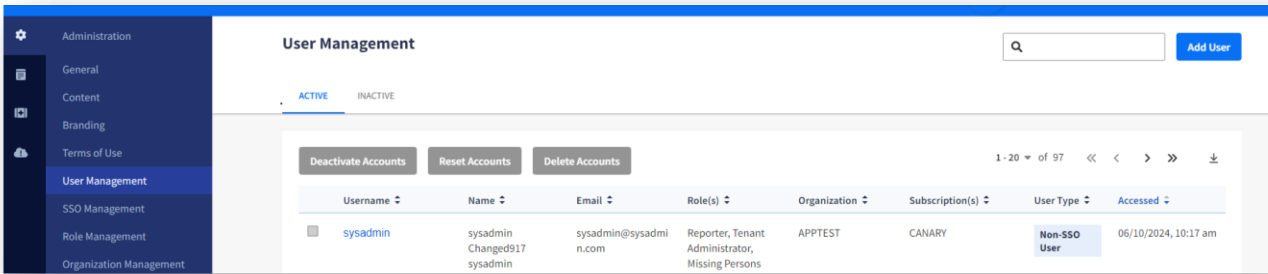
Note: Once the Organization is deactivated, all Users associated with that Organization will be unable to log into the system (e.g. to update their passwords) until/unless they are associated with a different Active Organization.

6 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 section 1 (Who Will Use This Guide).

6.1 User Management Homepage

Navigate to the User Management Homepage from the Administration section of the 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 (section 6.2)
- Search for a User (section 6.3)
- Edit a User Account (section 6.4)
- Activate a User Account (section 6.5)
- Deactivate a User Account (section 6.5)
- Reset a User Account (section 6.6)
- Delete a User Account (section 6.7)

6.2 Create a New User Account

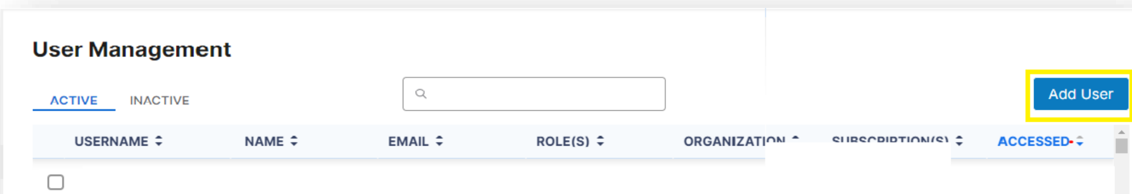
Create New User Accounts in Bulk

If you have a large number of users that you would like to provision, you can submit a service request through the Customer Support Portal and a 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.

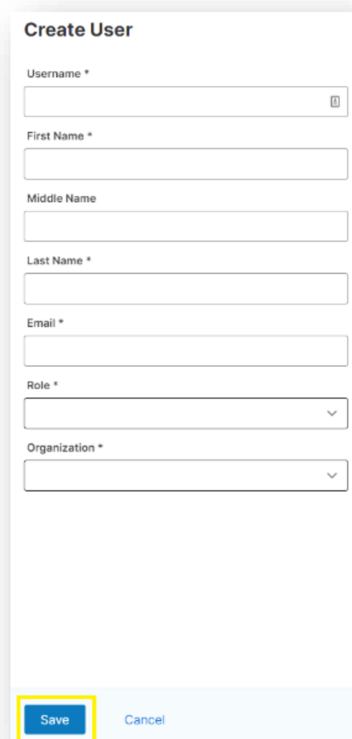
Create a Single New User Account

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



Enter the information in all the required fields (marked with asterisk*). Additionally, note:

- Username: must be a unique username for the individual. Usernames may include hyphens (-), but should not include spaces, punctuation, or special characters.
- 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 section 1.1 (Roles) of this guide for system permissions associated with each user role.
- Organization: Select one Organization with which this User will be affiliated. You will be able to select from among the Organizations for which you have administrative permissions.



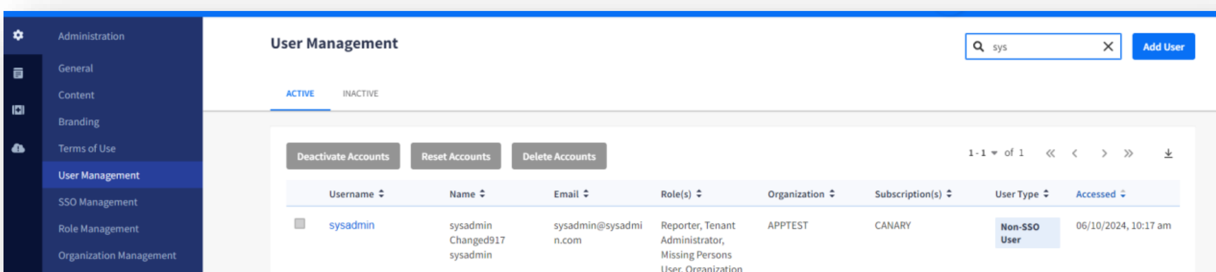
Once this information has been inputted, click "Save" to create the User Account. The User will receive an email like the one below from noreply@ainqapps.com. The [ORGANIZATION] and [link] will vary based on your Executive Sponsor.

> Your [**ORGANIZATION**] account has been created; your username is [username]. To log in, click the link [link] and complete the steps to finish setting up your account.
> If the link above is not clickable, please copy and paste the URL into your 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 [link] to receive a new link.
> Sincerely,
> The Team at [**ORGANIZATION**]

Tip! Prior to creating the User Account, you should inform the User(s) that they will receive this activation email and what it will contain. The link is only valid for an hour. After an hour, they will have to reset their password.

6.3 Search for a User

- 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.

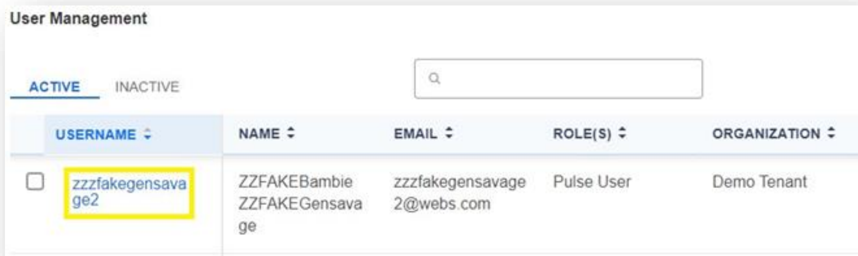


Note: Each word entered in the Search box will search across these fields. For instance, if you search "System Admin," returns will be for both words: System and Admin. The search box does not currently recognize strings of text contained within quotation marks ("").

- You can search an inactive user by toggling to the "Inactive" status and typing in the Search box.
- You can sort Users by using the arrows next to all fields on the User Management Homepage.

6.4 Edit a User Account

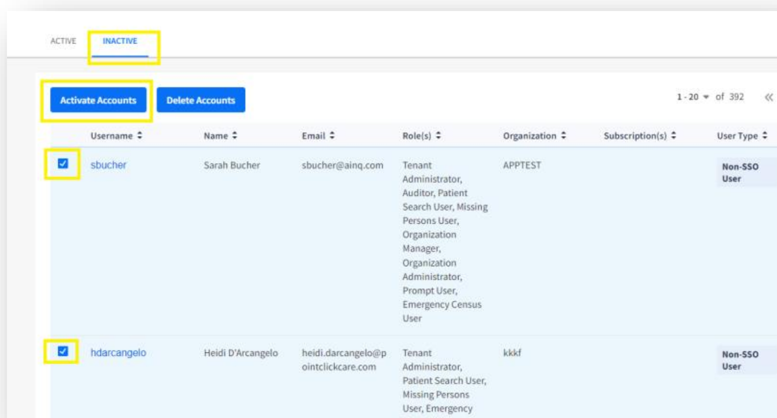
- Select the account you want to edit by clicking on the hyperlinked Username.
- Modify the information in the Edit User box as desired and select “Save.” Information regarding the creation date, author, and any modifications will be displayed. If you change the User’s Role and/or Organization, their permissions and access updates will be reflected at their next login to the system.



6.5 Activate/Deactivate a User Account

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

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



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.

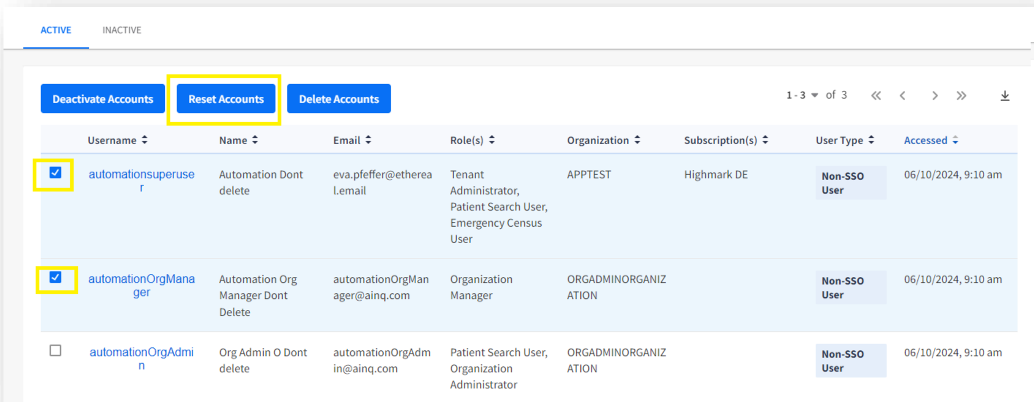
- You will be prompted with a confirmation message and asked to select the reason for deactivation. Select the most applicable reason and press “Deactivate.”

Note: Users that have been intentionally moved to Inactive status (Deactivated) will not receive password reset email reminders and will not be able to access the system

6.6 Reset a User Account

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. To reset a User Account:

- Select the User account(s) to reset and select “Reset Account.”

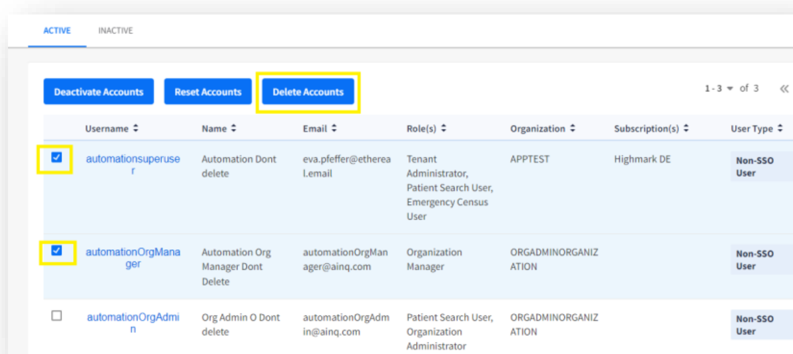


- The Administrator resetting the User Account is responsible for verifying the individual’s identity and that they continue to meet the requirements of an Authorized User.
- The user will be sent an Account Activation email with instructions on how to create a new password, select security questions, and provide answers to security questions.

6.7 Delete a User Account

To delete a user account, select the User(s) you want to delete from either the Active or Inactive tab using the checkbox next to the Username, and select “Delete Accounts.”

- You will be prompted with a confirmation message.
- Only Non-SSO Users can be deleted.



Once a User Account has been deleted, the deleted User Account Name can be used to create another User Account in the future. Once a User Account is deleted, the User Account will no longer appear in the User Interface, and Administrators will not be able to tell when the User Account was created or modified. Information related to a deleted User Accounts will persist in the User Interface (e.g., if the deleted User Account modified another User Account) and will appear in reports.

7 Facility Management Overview

This system can be deployed to multiple sites 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).

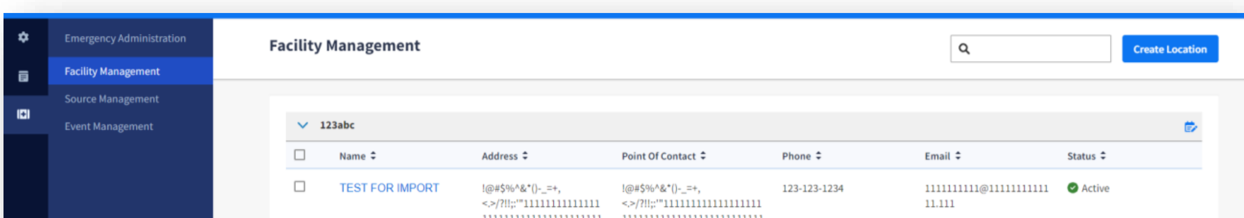
Locations can be used to group Facilities, perhaps by lead agency (e.g., Headquarters) or by jurisdiction (e.g., County, City).

All Facilities must be linked to a Location and a Location must be associated with an Organization. Users without an Administrator role will only see the Locations and Facilities associated with their Organization when they log into the system.

7.1 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.



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

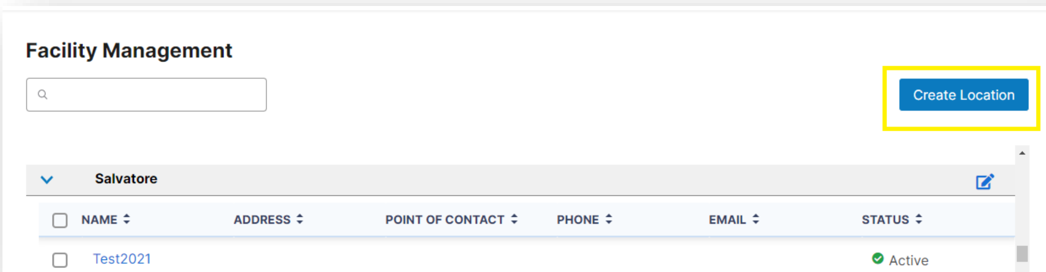
From the Facility Management Homepage you can:

- Create a New Location (section 7.2)
- Modify an Existing Location (section 7.3)
- Create a New Facility (section 7.4)

- Modify Facility Information (section 7.5)
- Activate or Deactivate a Facility (section 7.6)
- Search for a Location or Facility (section 7.7)

7.2 Create a New Location

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



In the Create Location box, enter the name of the Location. This must be a unique name within the system and contain a maximum of 50 alpha-numeric characters.

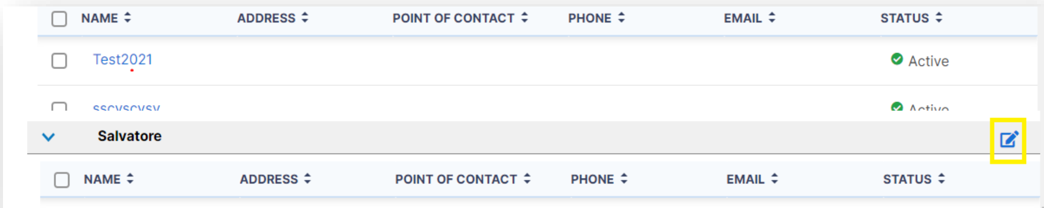
Select the Organization you want to associate the Location with. Each Location and its grouped Facilities can only be associated with one Organization. You will be able to select from among the Organizations for which you have administrative permissions.

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

Note: It may be helpful to label locations by the Organization associated with them, particularly if locations are created by location since physical locations (e.g. counties) may have multiple authorities operating within it. Consider naming locations to distinguish them, such as “County A – Health Department” and “County A – Emergency Management.”

7.3 Modify an Existing Location

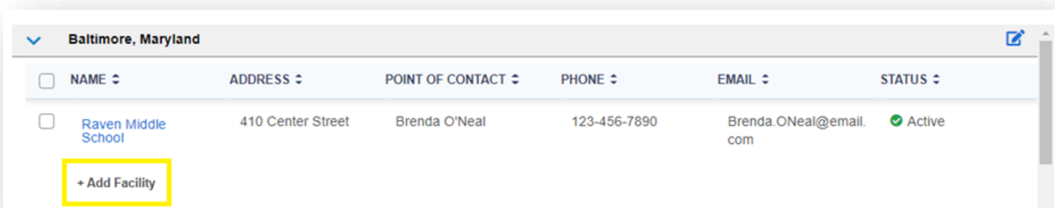
From the Facility Management Homepage, select the icon next to the Location you want to modify.



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

7.4 Create a New Facility

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."



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.

Name: the name of the Facility to be displayed and shared; this field is required. Facility Name has a limit of 50 alpha-numeric characters.

Address: the location of the Facility; this field is optional. Maximum of 200 alpha-numeric characters allowed.

Point of Contact: the name of the main contact at that Facility; this field is optional. Maximum of 200 alpha-numeric characters allowed.

Email: the email address associated with Facility; this field is optional. Must match a valid email pattern.

Phone: the phone number associated with Facility; this field is optional.

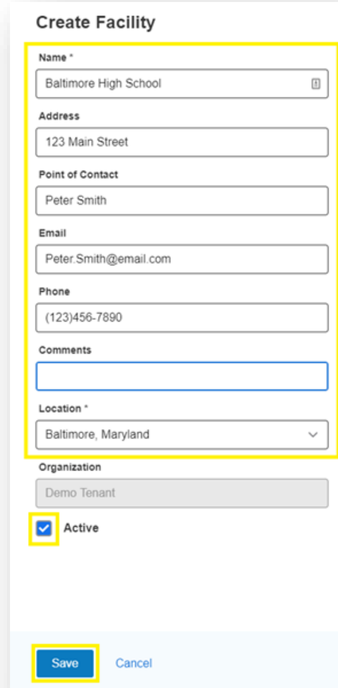
Comments: additional information to document; this field is optional.

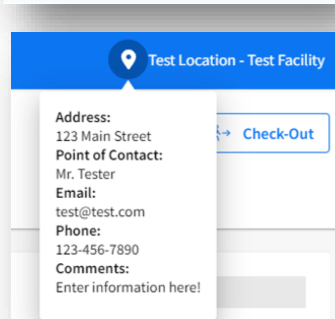
Location: select from Locations available to you to associate the Facility with a specific. Location; this will be pre-populated based on your selection in the Facility Management Homepage; this field is required.

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.

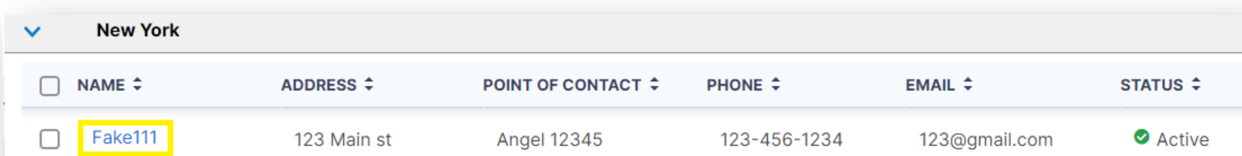
Information entered about a Facility will be displayed when a Patient Search or Emergency Census User hovers over the location icon located next to the Facility name located at the top right of the screen.





7.5 Modify Facility Information

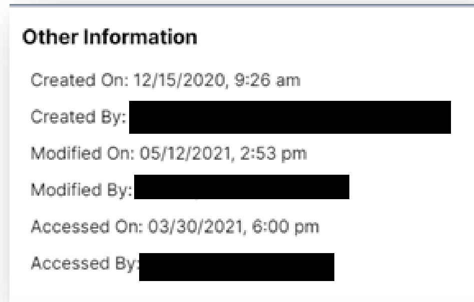
On the Facility Management Homepage, select the name of the Facility you would like to modify.



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.

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



7.6 Activate or Deactivate a Facility

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

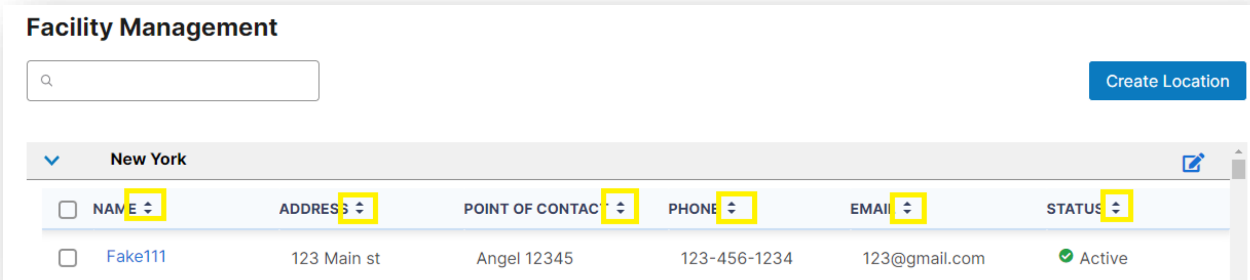
To activate/deactivate one Facility or multiple Facilities, select the checkbox(s) next to the desired Facility name(s) and then select “Activate Facilities” (or “Deactivate Facilities”) at the bottom of the screen.

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.

Once a facility is deactivated, Users will no longer be able to access the Patient Search or Emergency Census applications. If other active facilities are associated with Users’ organizations, they will still be able to access those applications (if there is an active event and their organization has been associated with it).

7.7 Search for a Location or Facility

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. As with the Search box in User Management (section 6.3 (Search for a User)), each word entered in the Search box will search across these fields. The search box does not currently recognize strings of text contained within quotation marks (“”).

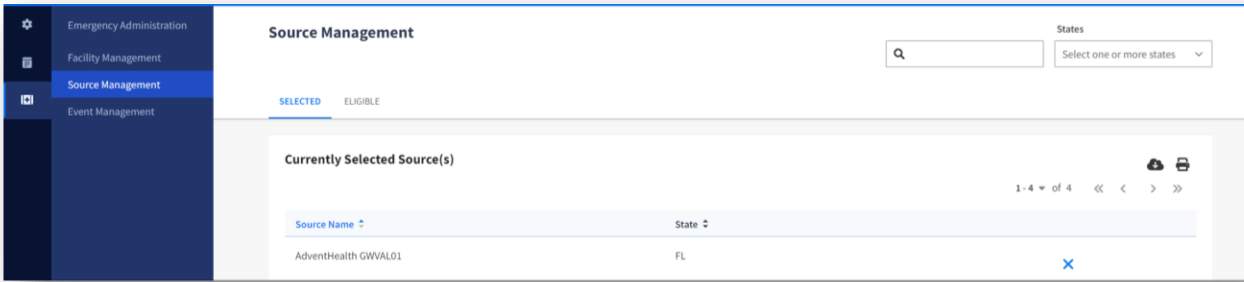
You can also sort Facilities within a Location by using the arrows next to all fields on the Facility Management Homepage table.

8 Source Management Overview

Source Management allows System 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. PointClickCare will also conduct an annual Source Assessment for each customer.

8.1 Source Management Homepage

Access Source Management by navigating to the Source Management Homepage from the Emergency Administration section. The Source Management Homepage allows you to select, update, and view the sources queried by the system during Patient Search.



From the Source Management Homepage, you can:

- View Sources by Selected and Eligible (section 8.1)
- Add and Remove Sources (section 8.2)
- Sort Sources Alphabetically by Name (section 8.3)
- Sort Sources Alphabetically by State (section 8.3)
- Print and Download Sources (section 8.4)

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

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.

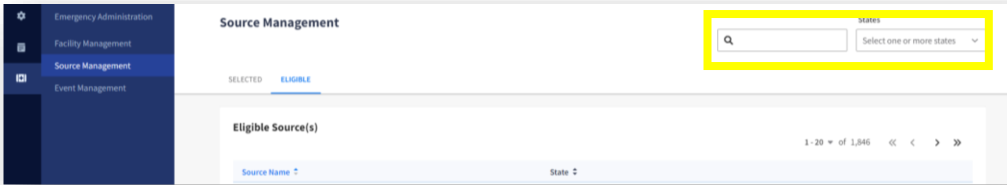
You will be able to easily identify selected and eligible Sources by toggling between the *Selected* and *Eligible* tabs in the Source Management Homepage.

8.2 Add and Remove 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.

To remove a tab, go to the Selected tab and select the “X” icon next to the Source you wish to remove. 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.

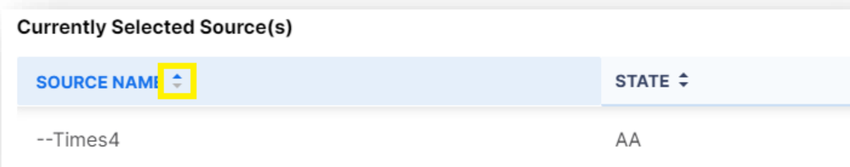


Note: Some sources are nationwide, meaning a single source provides data coverage for many or all locations for that organization (e.g., CVS MinuteClinics). They may be attributed to a specific state but provide national coverage. Please contact your Administrator or Support if you have any questions.

8.3 Sort and Filter Sources

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

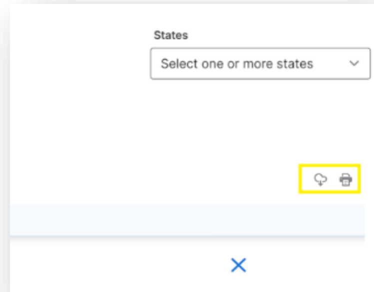
To sort Sources alphabetically (ascending or descending) by State, click on the arrow next to the State header.



To filter sources by state, select a state from the dropdown. As noted above, some sources may be attributed to a specific state but provide coverage beyond that jurisdiction.

8.4 Print and Download Sources

Administrators can print and/or download a list of selected Sources by selecting the download ( ) or print ( ) icon located at the top right of the selected Source table. Downloads will be in .csv format.

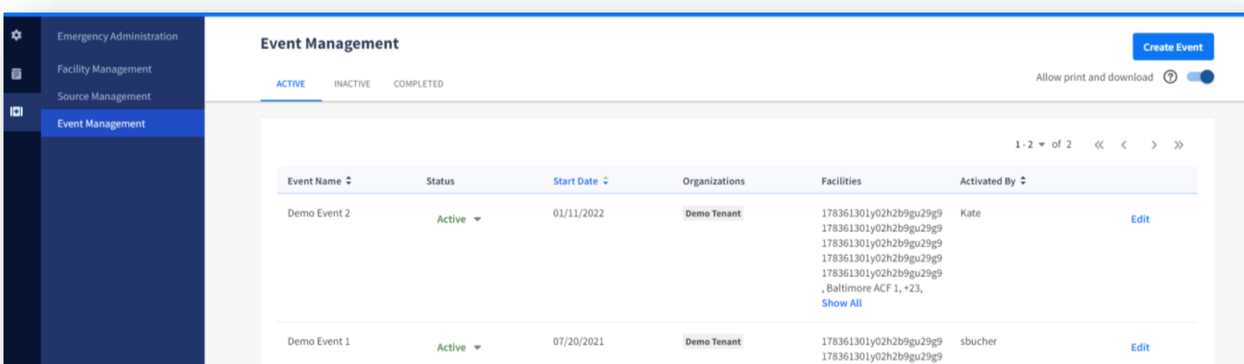


9 Event Management Overview

In Event Management, Administrators (System Administrators and Event Administrators) can create multiple Events and manage the Organizations and Facilities associated with each Event. Administrators and Event Administrators can 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.

9.1 Event Management Homepage

Access Event Management from the Emergency Administration section.

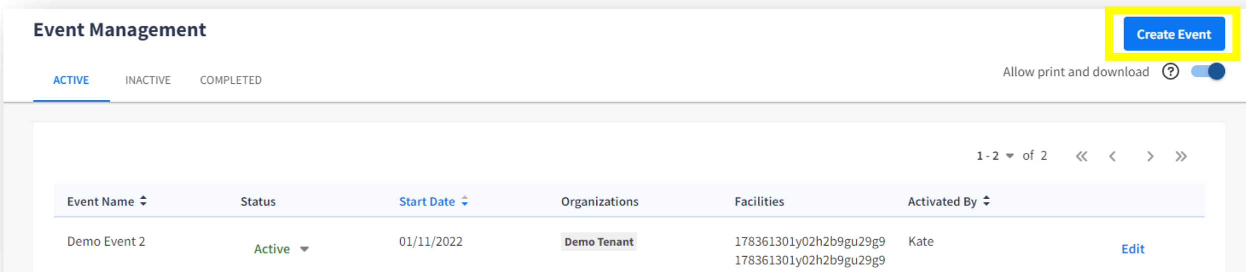


From the Event Management Homepage, you can:

- Create Events (section 9.2)
- Change Event Status (section 9.3)
- View Events (section 9.4)
- Edit Events (section 9.5)
- Enable/Disable End User Printing and Downloading (section 9.6)

9.2 Create Events

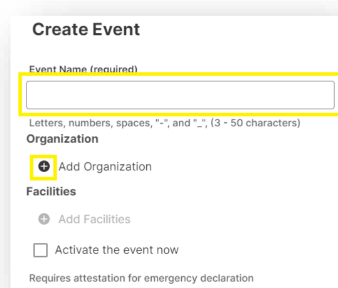
Create an Event by selecting the “Create Event” button located at the top right corner of the Event Management Homepage.



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

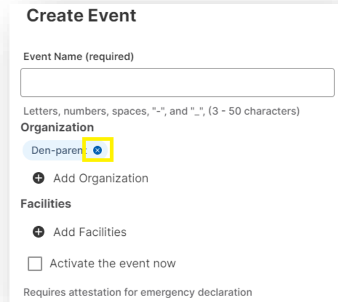
Note: Users without Administrator roles do not see the Event Name when they log into the system. They will only be shown the Facilities associated with the given Event to which their Organization has been assigned.

To add an Organization to an Event, 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.



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

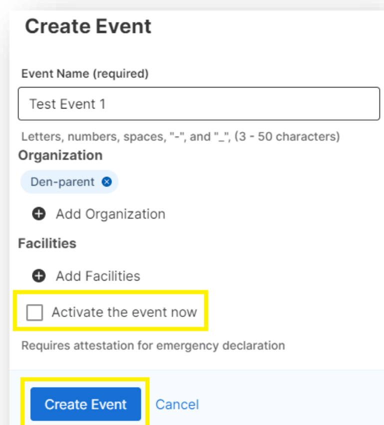
Select one or more Facilities that will be associated with the Event you are creating. Only Facilities associated with the Organizations you previously selected will be available. Both Active and Inactive Facilities can be associated to an Event.

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

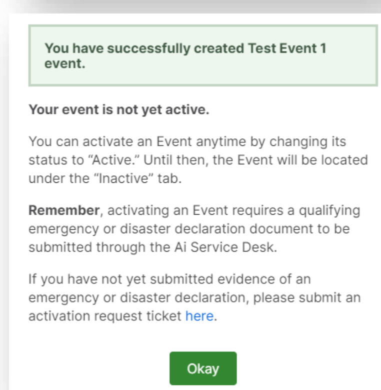
An Event may be designated as Active or Inactive upon creation.

Note: Activating an Event <u>does not automatically activate a Facility</u>. Inactive Facilities need to be activated via the Facility Management module, even if they have been added to an Event.

Create an Inactive Event



To create an Inactive Event in preparation for an emergency activation, 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 of the Event Management Homepage.

Create an Active Event

To create an Active Event, select the "Activate the event now" checkbox.

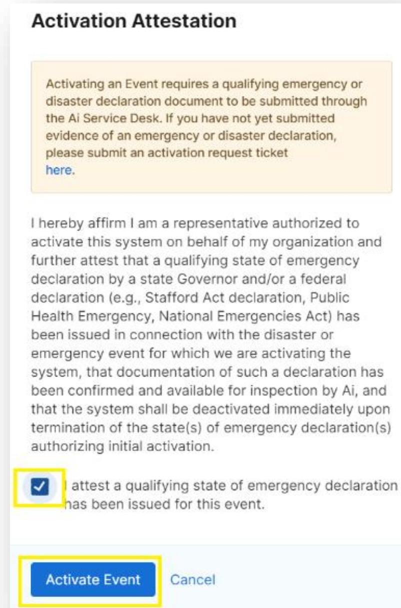
After adding Event Name, Organization(s) (optional), and Facilities (optional), select "Next."

You must also submit a ticket via the Customer Support Portal, using the link in the confirmation message, and selecting critical priority level. Here you should also include a copy of the disaster declaration (see below).

When an Event is Active, all Active Users associated with an Active Organization included in the Event will be able to log into the system and perform 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 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: An Event must be <u>Active</u> for a User to access and use Patient Search, Emergency Census, or Missing Persons.

9.3 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 to Inactive

Active Users in Facilities associated with this Event will be denied access to Patient Search and Emergency Census when this status change is made, unless their organization is associated with another active Event.

Inactive to Active

You will be required to attest that an emergency declaration form has been submitted to the 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 to 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 be denied access to Patient Search and Emergency Census when this status change is made, unless their organization is associated with another active Event.

Inactive to Completed

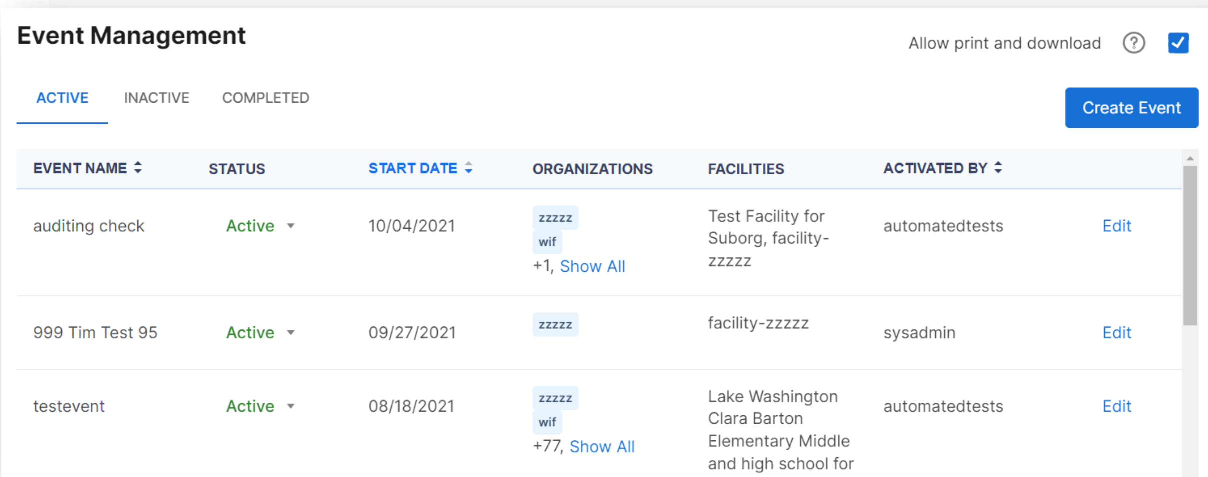
You will receive a prompt requesting that you confirm this status change. Once an Event is moved to Completed, it cannot be moved back to Active or Inactive.

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

Note: Both the Event and the Facility must be Active for an Active End User to access Patient Search and/or Emergency Census. An Active End User can still access Missing Persons as long as their Organization is Active, as Missing Persons does not require facility-level information.

9.4 View Events

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



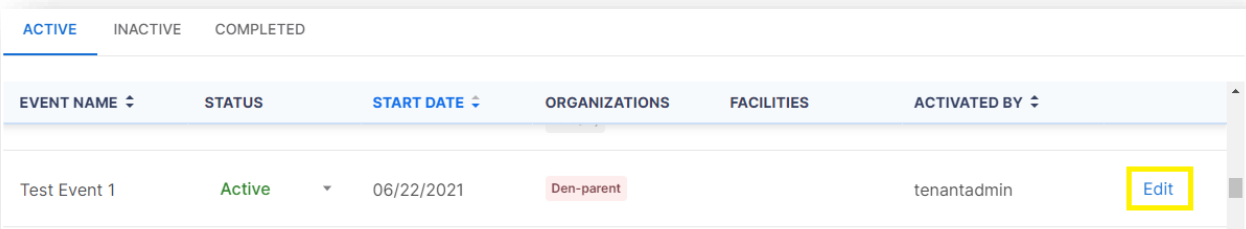
- Active Events are default sorted to display the Event with the most recent Start Date/Time on the top of the Homepage.
- The Start Date will either reflect the date an Active Event was created or the date a previously Inactive Event was moved to an Active status.
- The most recent Active status date will be displayed if the Event was toggled between Inactive/Active several times.

- Inactive 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 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.

9.5 Edit Events

Depending on permissions, you may have the ability to edit an Active or Inactive Event by changing the Event name, adding or removing Organizations, and/or adding or removing facilities. Change Event Name

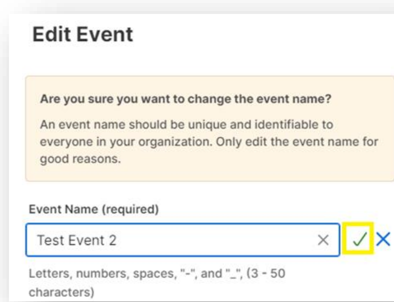
To change the Event name, select “Edit” from the Active or Inactive tab.



Select “Edit” next to the Event Name field.

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 you wish to proceed, select the green check mark to the right of the Event Name field prior to being able to select “Update.”



Add and Remove Organizations from an Event

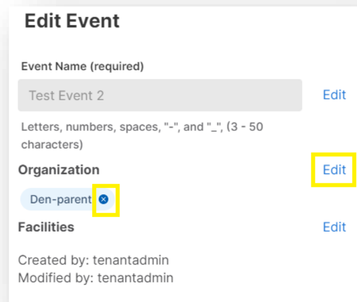
Add or remove Organizations from an Event in the Event Management Homepage. Users associated with an Organization will become associated or disassociated with the Events based on this action. Only Users in Organizations that are added to an Event may access Patient Search and/or Emergency Census when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

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.

Select "Edit" next to Organization to open a list of organizations to add or remove.

Alternatively, you can quickly remove any organization by clicking on the small "X" next to the organization name.

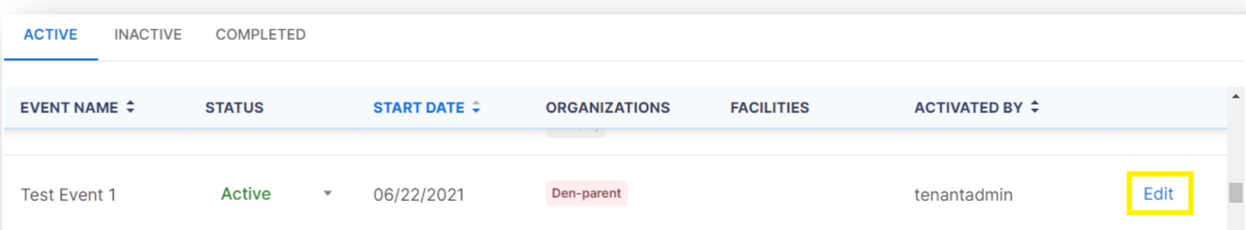
Removing an Organization will systematically remove all associated Facilities.



Add and Remove Facilities from an Event

Add or remove Facilities from an Event from the Event Management homepage. Only Facilities added to an Event will be available during ACF selection for Users accessing Patient Search and Emergency Census, and only for Users in the Organizations associated with those Facilities. Organizations and Facilities are listed alphabetically.

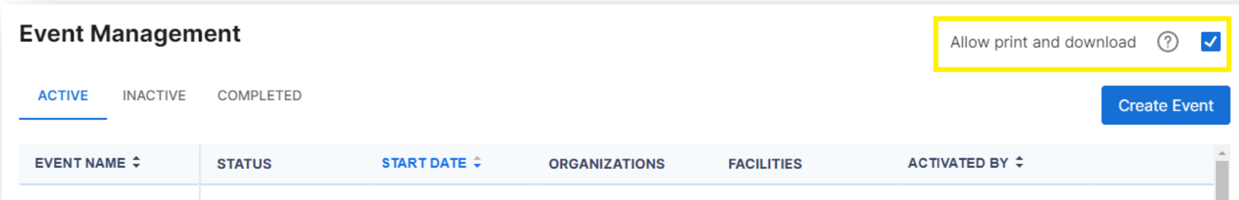
- To add or remove Facilities, select "Edit" next to the name of the Event from the Active or Inactive tab.
- On the next window, select "Edit" next to facilities, then add or remove facilities as needed.
- Only Facilities associated with Organizations already linked with the Event will be selectable.
- If the Facility you are attempting to add is not available, confirm that the Organization is added.



- Organization Administrators will only be able to add or remove facilities associated with their own Organization.

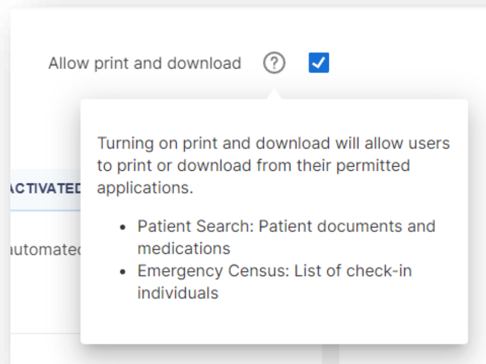
9.6 Enable/Disable End User Printing and Downloading

Administrators may turn on and off Print/Export by selecting the "Allow print and download" checkbox located on the Events Management Dashboard.



When a user selects the help icon next to the "Allow print and download," the following message will appear.

By selecting "Allow print and download," an Administrator is granting all Users associated with all Active Events access to print and download as their roles allow.



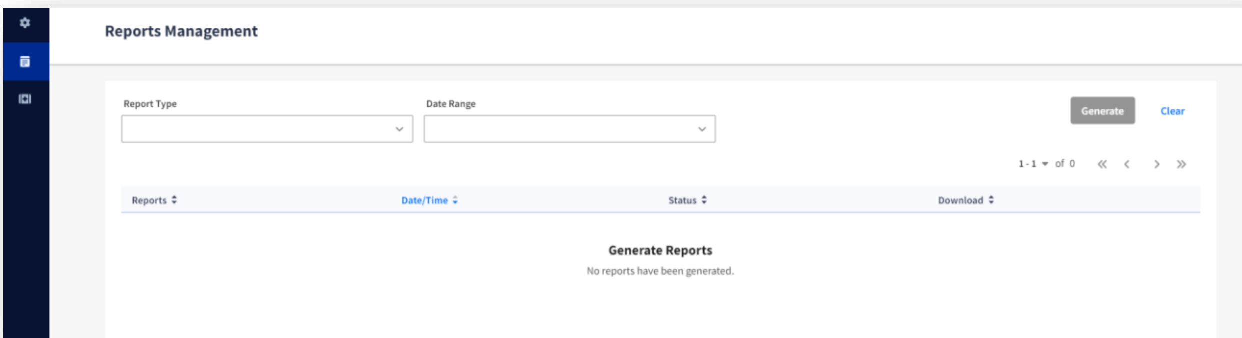
Note: Both the Event and the Facility must be Active for an Active End User to access Patient Search and/or Emergency Census. An Active End User can still access Missing Persons as long as their Organization is Active, but the Missing Persons Report will not run without an active Event.

10 Reports Management Overview

An Auditor can run administrative reports that document user activity in the system. Reports are preset with specific fields returned in a .csv file. Administrators should take caution in assigning this role, as the reports will cover activities system-wide (i.e., they are not restricted to the Auditor's Organization.

10.1 Reports Management Homepage

Navigate to the Reports Management Homepage from the Administration Menu. From here, two reports can be generated: Login History and Patient Chart Access reports.



10.1.1 Login History Report

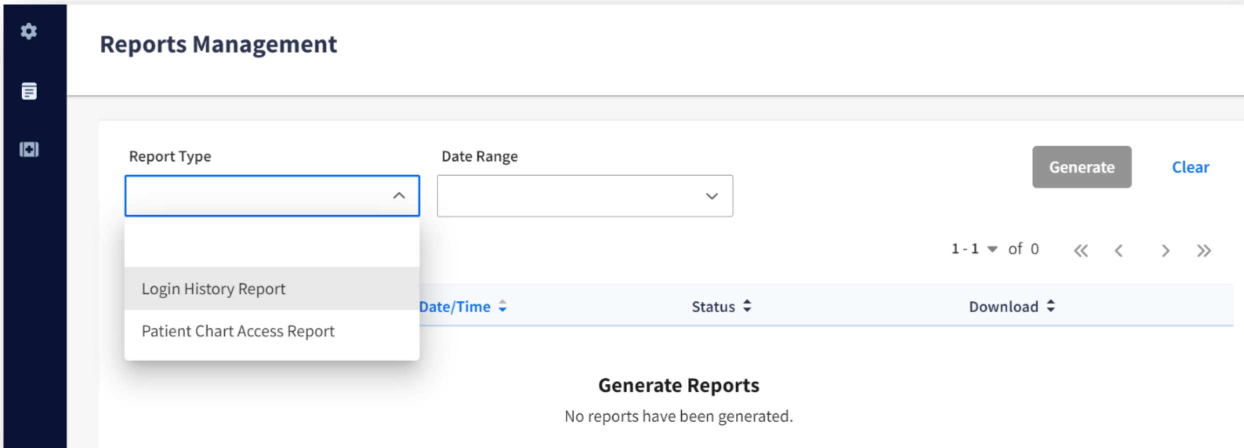
The Login History Report contains login and logout transaction history of all users for the time period specified. This report tracks the unique ID associated with each user, the user's name, the web browser used to access the application, the unique IP address for the user's computer, and login and logout time stamps. If a user is logged out due to inactivity rather than clicking "log out," the log out time stamp will be blank. 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 PointClickCare to investigate further and provide additional information on the login history, e.g. reasons for login failure. The Login History Report extracts data from a database that is updated every 2 hours. Login entries may be delayed in the report for up to 2 hours. Fields available on the Login History Report include: the User's ID, First Name, Last Name, and email address, and Login and Logout Date Time.

10.1.2 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, Retrieve Documents, and Retrieve Prescription History. Fields available on the Patient Chart Access Report include: the User's ID, First Name, Last Name, email, facility ID, the Patient's demographic information such as first name, last name, and address (these fields may be populated by the queried data source rather than what the User searched), event type (patientSearch, retrievedDocument, Medication Search, and Medication Response).

10.2 Generate a Report

To generate a report, select a Report Type from the drop- down menu options.



- Select the time period for the report (e.g., last 24 hours). 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.
- Click on "Generate" to produce the report.
- 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

11 Data Sources

Patient Search connects to National Health Information Networks. Through Patient Search, 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.

PointClickCare participates in the eHealth Exchange as a Hub Initiator, meaning that Patient Search can send queries to other participants on the network, but it does not respond to queries. Simply put, Patient Search "pulls" information from the eHealth Exchange, but does not "push" information. Through eHealth Exchange, networks including Carequality and CommonWell can also be queried.

Patient Search 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.

Patient Search is also connected to Surescripts, a nationwide network that facilitates electronic transmission of medication information between electronic health record vendors, pharmacy benefit managers, major pharmacies, and clinicians. Patient Search Users query Surescripts for patient medication information from the past 12 months.

12 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 (PointClickCare) 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 Terms of Use, you signify that you will comply with these terms

Appendix A: PULSE* SOLUTIONS TERMS OF USE (for individual Authorized Users)

*PULSE is branded as E-PLUS in Florida

Terms of Use (ToU) are hosted on the user interface (UI). End users must agree to the ToU upon logging into the UI. ToU are subject to update, and users mut agree to them each time they are updated.

PLEASE READ THESE TERMS CAREFULLY BEFORE ACCEPTING.

As a condition of my being granted access to the Audacious Inquiry ("Audacious") PULSE Enterprise Edition (PULSE EE), I agree to be bound by the following terms:

1. I represent that I am either a Subscriber to the applicable PULSE EE Applications, or an Authorized User for an organization or entity that is a Subscriber to the applicable PULSE EE Applications.
2. I agree to inform Audacious or a PULSE EE Administrator if I become ineligible to access to PULSE EE.
3. 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.
4. I will use PULSE EE, and will use and disclose information obtained through PULSE EE, 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.
5. I understand that data obtained through PULSE EE 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 EE.
6. 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/dursa/
7. 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 EE Policies and Procedures (8.0 Subscriber Agreement DURSA Flow-Down Requirements, 9.0 Surescripts Flow-Down Requirements) as amended from time to time. This includes without limitation relevant flow-down terms from the Surescripts network with respect to medication history.
8. I acknowledge that Audacious or its partners or licensors respectively, retain sole and exclusive rights in PULSE EE, 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 applications or any part thereof.
9. If I am an Authorized User for an organization or entity, I acknowledge that I have no greater rights or remedies against the Audacious or its partners, licensors, or service providers than are available to that organization or entity.
10. Except as restricted in an applicable agreement between Audacious and the organization or entity that I represent, Audacious may suspend or terminate my access to PULSE EE at any time and for any reason, including but not limited to my use of PULSE EE for unpermitted purposes or other violations of these Terms of Use.

11. 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 EE APPLICATIONS ARE PROVIDED TO ME "AS IS". AUDACIOUS 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. AUDACIOUS 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, AUDACIOUS AND ITS PARTNERS, LICENSORS, AND SERVICE PROVIDERS DO NOT REPRESENT OR WARRANT THAT THE OPERATION OR USE OF PULSE EE WILL BE TIMELY, UNINTERRUPTED OR ERROR-FREE. IN PARTICULAR, (I) AUDACIOUS DOES NOT WARRANT AGAINST POSSIBLE ERRORS OR MISMATCHES WHEN MATCHING PATIENT IDENTITIES BETWEEN DISPARATE DATA SOURCES. AUDACIOUS 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 AUDACIOUS WILL USE ITS BEST EFFORTS TO MINIMIZE SUCH ERRORS.
    C. NEITHER AUDACIOUS NOR ITS PARTNERS, LICENSORS, OR SERVICE PROVIDERS CONTROLS THE TRANSFER OF DATA OVER COMMUNICATIONS FACILITIES, INCLUDING THE INTERNET, AND THAT PULSE EE MAY BE SUBJECT TO LIMITATIONS, DELAYS, AND OTHER PROBLEMS INHERENT IN THE USE OF SUCH COMMUNICATIONS FACILITIES. AUDACIOUS IS NOT RESPONSIBLE FOR ANY DELAYS, DELIVERY FAILURES, OR OTHER DAMAGE RESULTING FROM SUCH PROBLEMS.
    D. NEITHER AUDACIOUS 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 AUDACIOUS AND ITS PARTNERS, LICENSORS, AND SERVICE PROVIDERS TO ME FOR ANY AND ALL CLAIMS, ACTIONS, PROCEEDINGS, DAMAGES, AND LIABILITIES ARISING IN CONNECTION WITH PULSE EE SERVICES, REGARDLESS OF THE NUMBER OF OCCURRENCES OR CLAIMS, SHALL BE LIMITED TO THE FEES ACTUALLY PAID BY ME TO AUDACIOUS FOR SUCH SERVICES, AND IF I HAVE PAID NO FEE, THEN TO TEN DOLLARS (USD $10.00)
12. These Terms of Use, together with any terms and conditions agreed by Audacious and the organization or entity that I represent that are applicable to its Authorized Users, contains the entire understanding of Audacious and me regarding my use of PULSE EE. I acknowledge that Audacious may change the Terms of Use for PULSE EE at any time and require me to accept such changed terms upon subsequent login in order to continue using PULSE EE.

Appendix B: Permitted Purposes

Subscribers and Authorized Users may access and use data through PULSE 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, while specific notifications, bulletins, or waivers from HIPAA requirements issued by HHS and specific to a public health emergency or disaster declaration remain in force, and provided that Subscriber and its Authorized Users comply with the conditions specified in that notification, bulletin, or waiver, Audacious Inquiry will not consider activities covered by that notification or waiver to be breaches of these Policies and Procedures. Each Subscriber must make its own judgments respecting the contents of that notification, bulletin, or waiver, 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.