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# **SIMON Module**

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User Guide

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October 1, 2024

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# The SIMON Module

Parklane's SIMON Module is a powerful multi-functional application. SIMON provides a valuable resource to your organization providing a fully reactive, powerfully proactive and cost-effective solution to a wide variety of situations ranging from a sudden outbreak to the annual operation of an internal flu vaccination program.

Parklane's user-defined tables, swipe card, barcode and proximity options for internal badges (also health cards or drivers licenses) will ensure the immediate availability of SIMON's data, thereby reducing the real-time keystrokes while ensuring the highest degree of accuracy.

Whether the situation is an outbreak, a pandemic, a flu immunization program or the reporting and management of an infectious illness, Parklane's SIMON module has been designed to manage the risk.

Operation is tailored for the full user or the Web Forms only, and is also available to other Parklane users via the Chart Module.

From large multi-site health care networks to smaller regional providers, all facilities will find SIMON both cost effective and useful in maximizing and maintaining peak operating efficiency in today's tightly-staffed working environments.

## SIMON

**SURVEILLANCE** – a comprehensive program which can be proactively used by your facility to minimize or possibly prevent a potentially serious and sudden infectious illness outbreak spread by either staff or non-staff.

**IMMUNIZATION** – a program to manage and record flu immunizations, TB, H1N1, etc. of your Health Care staff, thereby allowing you to quickly and easily identify who is “fit to work”.

**MITIGATE** - all aspects of the SIMON module have been carefully designed to aid your facility in monitoring and diminishing the risks and costs which can be associated with a serious pandemic, an infectious illness outbreak or a mass flu immunization clinic.

**OUTBREAK** – preparedness is a critical concern these days with infectious disease experts saying “not IF but WHEN”. With outbreaks that require antiviral medications, it will be extremely important to track and record all handling and dispensing of medications.

**NOTIFICATION** – with countless comprehensive reports, SIMON will assist your facility in staying on top of the increased numbers of potential infectious illnesses.

## Getting Started

This guide provides the instructions to install and set up Parklane's SIMON Module.

<b>Steps to Setting Up SIMON</b>	<ol style="list-style-type: none"><li>1. Security</li><li>2. Set up tables</li><li>3. Personal Data to set up ZZNONSTAFF if applicable (See Notes Below)</li></ol>
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### Notes:

If your non-staff are not currently in Personal Data, Non-Staff information can be kept in a separate file in SIMON. They will not be added to your Personal Data module and they cannot be reported on in other modules except SIMON.

Because Departments are a critical part of Parklane reporting, the SIMON module automatically assigns all SIMON Non-Staff to the ZZNONSTAFF Department. As part of your set-up process for SIMON, please go to your Personal Data module and from the main menu click on Options/Departments &Groups/Department & Group Tables/Add Departments. For both the Abbreviation and Description enter ZZNONSTAFF.

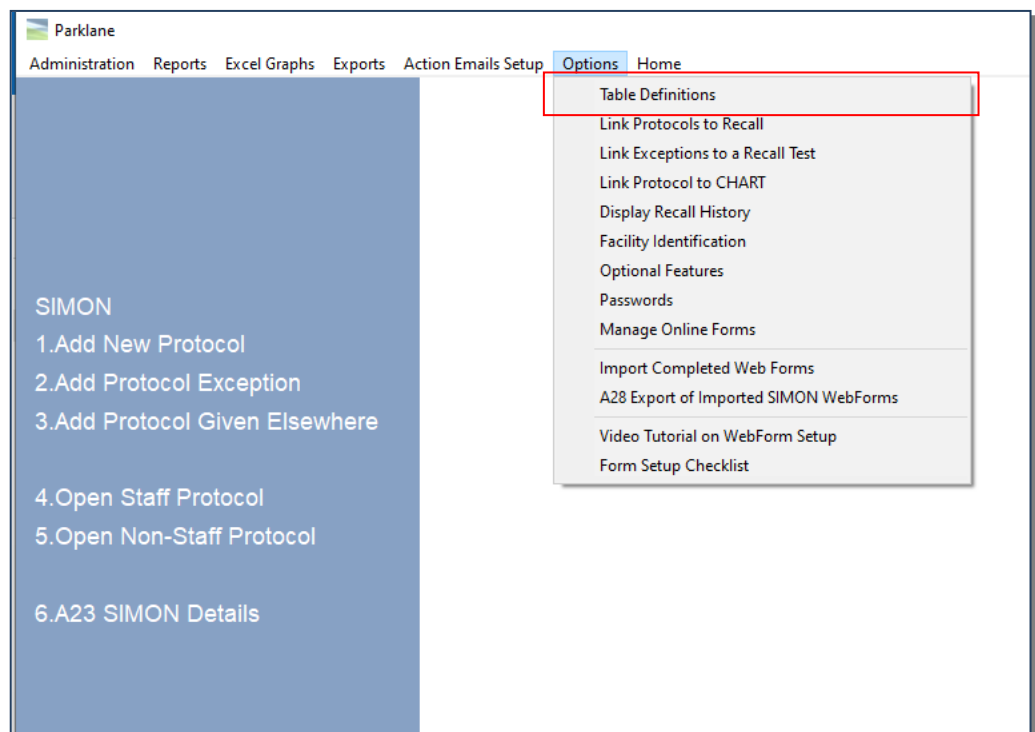
### Version/Release:

Because the SIMON Module and the SIMON Web Forms are two separate programs that work in conjunction with each other, it is recommended that when either program is updated, the other be updated at the same time.

It is important to update the core system first followed by updating the web forms.

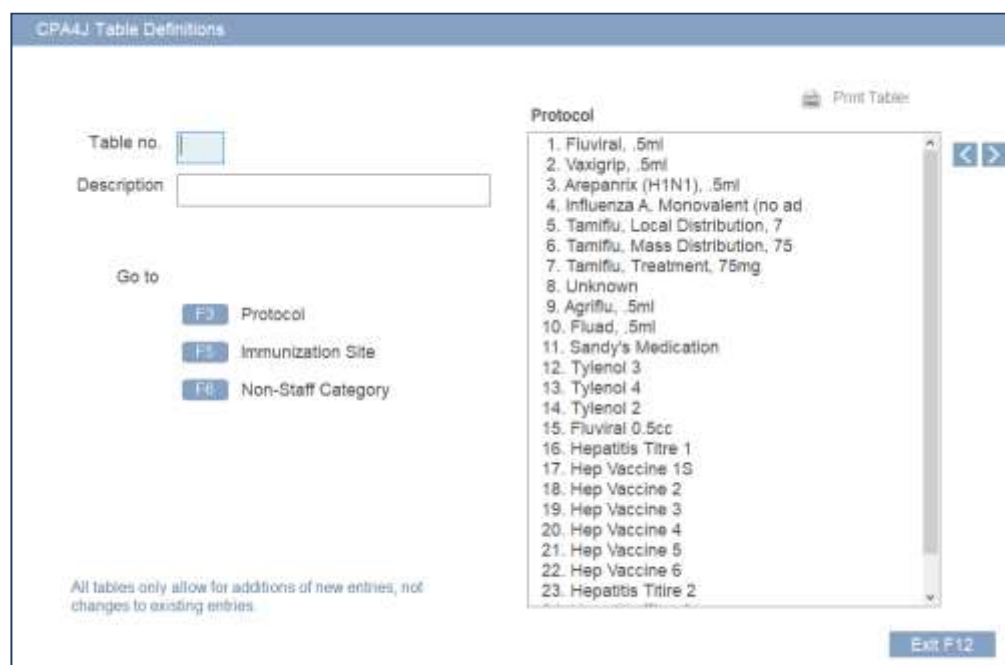
# Options

## Table Definitions



As is the case with all other Parklane Systems modules, SIMON employs user-defined tables to assist in tailoring the program to specifically suit the needs of any facility and Program situation.

To record the various types of Programs, Protocols, Routes Administered and Immunization Sites, from the main menu, click on **Options**, and then click on **Table Definitions**.



Examples of table entries include:

**Protocol** – Vaxigrip, Fluviral, Tamiflu, etc.

**Immunization Site** –Right Deltoid, Left Deltoid, etc.

**Non-Staff Category** – Contractor, Volunteers, Students, etc.

## Setting up a description in any table:

1. In the **Table no.** field, enter the next available blank number from the descriptions currently in the system area found directly to the right.
2. In the Description field, enter a descriptive phrase.
3. All of the tables will allow for up to 30 characters of alphanumeric text in the Description field and up to 500 different descriptive entries.
4. To print a listing for any of the table entries, click on **Print Tables**.
5. To return to SIMON's main menu, click on **Exit F12**.

**NOTE:** When adding new entries to the tables, care should be taken to NOT leave any blank numbers between descriptions.

## Link Protocols to Recall

When you link to a Recall test, the SIMON module will automatically update each employee's record in Recall when a protocol is administered. In order to do this, there are a couple of steps which must first be completed.

From the main menu of SIMON, click on **Options**, and click on **Link Protocols to Recall**.

The screenshot shows a software window titled "CPA2A Link Protocol To A Recall Test". In the top right corner, there are "Print" and "Remove" buttons. The main area contains three fields: "Protocol" with a dropdown menu showing "Vaxigrip 0.5ml", "Which Recall test is to be updated:" followed by "Recall Test" with a text box containing "FLU VAC" and a blue checkmark icon, and "Recall Group" with a text box containing "FLU". At the bottom right, there is a blue button labeled "Exit F12".

Select

the

Protocol Given in the drop down; then select the specific Recall test you wish to have updated when this Protocol is administered.

For detailed information on defining Recall Groups and Tests please refer to the Recall User Guide (**Options, Test Descriptions**).

## Link Exceptions to a Recall Test

Similarly, when you link exceptions to a Recall test, the SIMON module will automatically update each employee's record in Recall when the exception is recorded in SIMON.

If you want to link exceptions to Recall, such as: **Declined** or **Medically Exempt** or **No Alternative**, the Recall test should first be set up in Recall and then it can be linked.

To link, click on **Options** and click on **Link Exceptions to a Recall Test**.

Click on the button in order to select the Recall Test Group and the Recall Test.

CPA14 Link Exceptions to Recall Test

Which Recall test is to be updated Print Remove

**Medically Exempt**

Recall Test: FLU EXEMPTION

Recall Group: FLU

**No Alternative**

Recall Test:

Recall Group:

**Declined**

Recall Test: FLU REFUSED

Recall Group: FLU

Exit F12

### Note about linking *Exceptions* to Recall:

Once you have linked these exceptions to a test in Recall, you cannot link the same items to another test in another group.

In other words, if you link these exceptions to Recall in the Flu Program, you cannot link these exceptions in another SIMON program, as the Flu Program is using them.

## Link Protocols to Chart

When you link to Chart, the SIMON module will automatically update each employee's record by adding a Chart when a protocol is administered. In order to do this, there are a couple of steps which must first be completed.

From the main menu of SIMON, click on **Options**, and click on **Link Protocols to Chart**.

Select the Protocol from the drop down that is to be mapped over to Chart; then select the specific Classification to be recorded when this Protocol is administered; then select the Condition to be recorded.

Chart table descriptions must match what is in SIMON exactly, including upper/lower case.

## Display Recall History

You can also Display information from Recall to SIMON. If your company has chosen to use the Recall module to schedule and record health tests taken by your employees, it may be useful to show some of this information to the users who are administering the protocols. This information will also be displayed on the Protocol Given Elsewhere and Screening (SRH) input panels.

From the main menu of the SIMON module, click on **Options** and click on **Display Recall History**.

Recall Test	Recall Test Group	Remove
3M 8110 SM	MASK FIT TESTING	<input type="checkbox"/>
3M 8100	MASK FIT TESTING	<input type="checkbox"/>
3M 8210	MASK FIT TESTING	<input type="checkbox"/>
3M 8110 LG	MASK FIT TESTING	<input type="checkbox"/>
MASK FIT TESTING	MASK FIT TESTING	<input type="checkbox"/>

## Facility Identification

Select the Facility Identification from the drop down menu. To add a new facility, click on the first available “Not Defined” to access a new Facility Identification panel and complete all necessary fields. A maximum of 500 Facilities may be added. Facilities may also be imported into the SIMON module. Contact Parklane Support for import details.

The image shows a screenshot of the 'CPA40 Facility Identification' form. The form is titled 'CPA40 Facility Identification' and 'Part D - UIIP service provider'. It contains several sections for data entry:

- Facility Information:** Name (FIRST STREET CLINIC), HP Code (empty), Facility Hosting Clinic (FIRST STREET BUILDING), Address Unit No. (empty), Street No. (123), Street (FIRST STREET), City/Town (LONDON), Prov./State (ON), Postal/Zip (N6P 1H8), Phone No. (519 672-9900), Ext. (00000).
- Provider Information:** Last Name (KANE), First Name (SARA), Middle Initial (empty), Telephone No. (519 655-7780), Email (S.kane@parklanesys.com), Date (empty), Initials (empty).
- Pharmacy Information:** Pharmacy Administering Vaccine (VACADMIN INC.), Pharmacy ONO Number (empty), Address Unit No. (empty), Street No. (9900), Street (GRAND AVE), City/Town (LONDON), Prov./State (ON), Postal/Zip (N6T 1J7), Phone No. (519 455-0022), Ext. (00000).
- Pharmacy Contact:** Last Name (KNOTT), First Name (BECKY), Middle Initial (empty), Telephone No. (519 655-7781), Email (S.kane@parklanesys.com), Date (empty), Initials (empty).
- Facility Type:** XYZ HLTH UNIT.
- Facility Options:** Radio buttons for Workplace - Non - Health Care (i.e. financial institution), Workplace - Health Care (i.e. Hospital, LTCH), Group Home, Community Care Access Centre, Retirement Home, and Other (specify).

Overlaid on the form is a dropdown menu titled 'SL94 Select one from the list'. It contains a list of facility identification options:

- 1 FIRST STREET CLINIC
- 2 SECOND STREET CLINIC
- 3 Not Defined
- 4 Not Defined
- 5 Not Defined
- 6 Not Defined
- 7 Not Defined
- 8 Not Defined
- 9 Not Defined
- 10 Not Defined
- 11 Not Defined
- 12 Not Defined
- 13 Not Defined
- 14 Not Defined
- 15 Not Defined
- 16 Not Defined
- 17 Not Defined
- 18 Not Defined
- 19 Not Defined
- 20 Not Defined
- 21 Not Defined
- 22 Not Defined

At the bottom of the dropdown menu, it says 'Double Click or Down Arrow & press Enter' and 'Exit F12'.

## Facility Option

There are several options in SIMON which can be turned on or off depending on how you want to use the module. To define these options, from the main menu of SIMON, click on **Options**.

The panel has the following selections:

- Signature tablet/pad used
- Allow Express User to add Non-Staff
- Print a record of Vaccination
- Facility Identification

Click on the appropriate radio button to turn an option on or off.

**CPA04 Optional Features**

Allow Non-Staff records in SIMON	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Print a record of Vaccination	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Facility Identification	<input type="radio"/> Yes	<input checked="" type="radio"/> No

Exit F12

## Passwords

The **Passwords** option in the drop down menu will access the Password panel allowing access to the accounts currently enabled and provide the ability to add new Usernames and new Passwords.

CPA4R Passwords

Enter the Table number from the box on the right or click on Table entry

Print Remove Username

Username (max 20 chars)

Password

Last name

First name

User ID that is to appear in "Entered By" on the record when a form is added under this Username.

Add next user F4

Accounts currently enabled

1. CE	Everitt, Claudett
2. kf	Ferrell, Karen
3. sarah	McCarthy, Sarah
4. test	test, test
5.	
6.	
7.	
8.	
9.	
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25.	
26.	

## Manage Options

There are several options in SIMON which can be turned on or off depending on how you want to use the module. To define these options, from the main menu select **Options, Manage Online Forms**.

The **List of Online Forms** will open to show any Active, Pending, or Closed forms. To open, double click on the form line. If no forms exist or you want to add a new form, select **Add Rec F3**. When adding, a Copy feature allows for the duplication of a previously created program. Once a form is duplicated, it may be edited. You may copy a Closed program and then edit the copied program form.

	Date	Program	Status
1.	18 Dec 20	2022/23 Flu Campaign	Pending
2.	19 Dec 19	Influenza Campaign	Closed

Show Hidden Forms    F2    Add Rec F3    Menu F12

No. of Forms    2

Selecting a form will open that record and default to the **Form Description** panel. The Sidebar menu provides access to additional record panels.

CPA4B Manage Online Form

- Form Description
- Introduction
- Questions
- Consent
- Protocols
- Staff
- Report of Options

## Form Description

The **Form Description** panel identifies the Program Name and the description that will appear on the Form. This panel also has several options to include proximity/swipe cards, facility, non-staff or to include a provision for declination with choices of Declined, Medical Exempt or No Alternative. The Status selected determines whether the form is available for use.

The **F3 Copy** feature allows for the duplication of a previously created program. Once a form is duplicated, it may be edited. You may copy a Closed program and then edit the copied form.


Checking the Multi-Step Protocol box will activate a visual display of previously recorded Protocols (within this program) in SIMON Web Forms (SWF). For example, if you are dispensing a 2 Step vaccine, SWF users can see whether the employee has had part 1 or part 2 of the vaccine. Essentially, this provides the user with reassurance that Step 1 has been completed (and when) before moving on to Step 2.

**Note:** Only select **Active** when all panels of the form have been completed and are ready for use. Once the form is **Active**, it cannot be changed back to **Pending**. Once a form is **Closed**, it may be reactivated.

CPA4C Description

Program Name

2022/23 Flu Campaign

☐ Check if this Program is a Multi-Step Protocol
 

Description on Form

2022/23 Flu Campaign

MOH No.

☐ Include staff lookup using proximity/swipe card  
☒ Include facility  
☒ Include non staff  

☒ Include non staff categories  
☒ Include a miscellaneous field for non staff

☒ Include a provision for declination  

with choices of Declined, Medical Exempt, No Alternative

Status

☒ Pending    SARA    18/12/2020  
☐ Active  
☐ Closed

Status determines if the form is available for use. A new form will default to Pending. When the form ready for use, select Active. When the form is no longer required, select Closed.

Once form is active, you cannot change it back to Pending.

Form Comments

☐ Consentee  
☐ Staff  
☒ Declination

RE-Activated

☐ Hide form from "Form List"

Form No.

2

Entered By

SARA

## Introduction

The **Introduction** panel allows for the entry of text that will appear on the form. A link may also be entered in order to direct the individual to a website or page that provides additional information. The information box is also equipped to display hyperlinks written in HTML.

CPA4M Introduction

Introduction to appear on the form

The Pfizer-BioNTech COVID-19 mRNA vaccine (Tozinameran or BNT162b2) is used to prevent COVID-19.

[Click Here for Information](http://www.parklanesys.com/res/tutorials/SIMON/pfizer.html)

This disease is caused by severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2). The vaccine is approved for people who are 16 years of age and older. Its safety and effectiveness in people younger than 16 years of age have not yet been established. The Pfizer-BioNTech COVID-19 vaccine is manufactured by Pfizer Canada ULC and BioNTech Manufacturing GmbH.

Health Canada authorized this vaccine with conditions on December 9, 2020, under the Interim Order Respecting the Importation, Sale and Advertising of Drugs for Use in Relation to COVID-19. Find detailed technical information about the Pfizer-BioNTech vaccine, such as the product monograph and our regulatory decision summary, in the COVID-19 vaccines and treatments regulatory portal.

Medicinal ingredient mRNA Non-medicinal ingredients ALC-0315 = ((4-hydroxybutyl)azanediyl)bis(hexane-6,1-diyl)bis(2-hexyldcanoate) ALC-0159 = 2-[(polyethylene glycol)-2000]-N,N-ditetradecylacetamide 1,2-Distearoyl-sn-glycero-3-phosphocholine cholesterol dibasic sodium phosphate dihydrate monobasic potassium phosphate potassium chloride sodium chloride sucrose water for injection.

\* Symptoms of COVID-19 can include fever, new onset of cough or worsening of chronic cough, shortness of breath, difficulty breathing, sore throat, difficulty swallowing, decrease or loss of smell or taste, chills, headaches, unexplained tiredness / malaise / muscle aches, nausea / vomiting, diarrhea or abdominal pain, pink eye, or runny nose or nasal congestion without other known cause or, for those over 70 years of age, an unexplained or increased number of falls, acute functional decline, worsening of chronic conditions or delirium.

<https://test.com/download.txt>

\*\* Polyethylene glycol (PEG) can rarely cause allergic reactions and is found in products such as medications, bowel preparation products for colonoscopy, laxatives, cough syrups, cosmetics, skin creams, medical products used on the skin and during operations, toothpaste, contact lenses and contact lens solution. PEG also can be found in foods or drinks, but is not known to cause allergic reactions from foods or drinks.

5000 characters


If you wish to provide a link to an informative web site or page, enter link below and make reference to it in your Introduction


<https://covid-19.ontario.ca/covid-19-vaccines-ontario>

## Questions

Questions to appear on the form are entered on this panel along with the selection of the question type. Once the form is Active, editing of the text is allowed. You may change/correct wording, but the intention of the question must remain the same. Do not change the context of any question. Otherwise, statistics will be wrong. Additional questions may be added.

**CPA4D Questions**

 F8 Insert Question

 F7 Remove Question

☒ Include Question Section

Question	Type
1 Have you ever had a severe allergic reaction within 24 hours of influenza vaccination?	Yes,No ▾
2 Do you have any allergy to any of the following vaccine components? Gentamycin, Chicken Protein, Formaldehyde	Yes,No ▾
3 Have you ever developed Guillain-Barre syndrome within 6 weeks of getting a flu shot?	Yes,No ▾
4 Do you currently have a serious illness such as active nervous system disorder? You can still get the flu shot if you have a cold or minor illness.	Yes,No ▾
5 Do you have a bleeding disorder or are you on a blood thinner?	Yes,No ▾
6	▾
7	▾

Maximum 30 questions. Each question has a maximum of 200 characters.

Once a form is active:  
Do not change the context of any question you have entered. You may change/correct wording, but the intention of the question must remain the same. Otherwise, your statistics will be wrong.  
You may add additional questions at the end.

Please check "Include Question Section" to include this section on the form.

## Consent

The **Consent** panel allows for the entry of text that will appear on the form. This panel also has options to allow a signature with mouse or signature pad, and to include a date and time of the consent.

CPA4E Consent

☒ Include Consent Section Please check "Include Consent Section" to include this section on the form.

Text

type the disclaimer here

Maximum 5,000 characters

☒ Allow for Signature ☒ Provide for Date & Time of Consent

☒ Signature with mouse/tablet ☐ Signature with pad ☐ N/A

## Protocols

The **Protocols** panel allow for the entry of up to 30 protocols specific to the program entered along with Lot Numbers for each. If there are multiple protocols, two options are provided. Allowing the user to select any number of protocols or have the system automatically select the first protocol and allow the user to select additional protocols. This panel also has options to include the injection site, include the lot number and allow for lot number override. The user will select the lot number from the list provided. On subsequent forms, the lot number will auto-fill until a new one is selected. The override option allows the user to enter a lot number other than those listed.

CPA4F Protocols	Include	Include	<input checked="" type="checkbox"/> Include Protocol Section		<input type="checkbox"/> Automatically select first Protocol			
Protocol	Injection Site	Lot No's			<input checked="" type="checkbox"/> Allow for Lot No Override	> CF1 Next Page < CF2 Prev Page		
Fluviral, .5ml	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ABC123	CDE234				
Vaxigrip, .5ml	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
	<input type="checkbox"/>	<input type="checkbox"/>						
	<input type="checkbox"/>	<input type="checkbox"/>						

## Staff

The **Staff** panel allows for the entry of any individuals that will be giving the protocols for the program entered. These names may be changed once the form is Active. This panel also has options to include the date and time the protocol was given by the staff identified, allow for a signature by mouse or signature pad and include the date and time of the signature. On subsequent forms, the staff name will auto-fill.

CPA4G Staff
☒ Include Staff Section
List Staff names below

Kimberley Mann	Sarah McCarthy		

☐ Check here to show all names in same sequence as entered above  
Staff name will be auto selected on subsequent forms.  
Staff names can be changed when form is active.

☐ Include Date & Time Given
☐ Allow for Signature

☐ Signature with mouse/tablet
☐ Signature with pad
☐ N/A
☐ Provide for Date & Time of Signature

Please check "Include Staff Section" to include this section on the form.

Disclaimer
Maximum 500 characters

## Report of Options

The **Report of Options** panel provides a text report on screen which lists the options selected for the form of the program. The report may be printed if necessary.

Sarah Company - BC	Page 0001 A4N
SIMON	Date 15 Aug 23
Options selected for form Flu Campaign 2022/23 comp3	Time 13:37

---

Form Description: Sarah's Form for Training.

Include a provision for declination

Include staff lookup by card swipe

Include facility

Include Non Staff

    Include categories

    Include a miscellaneous field

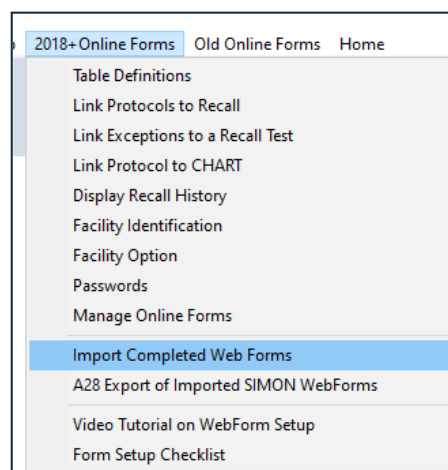
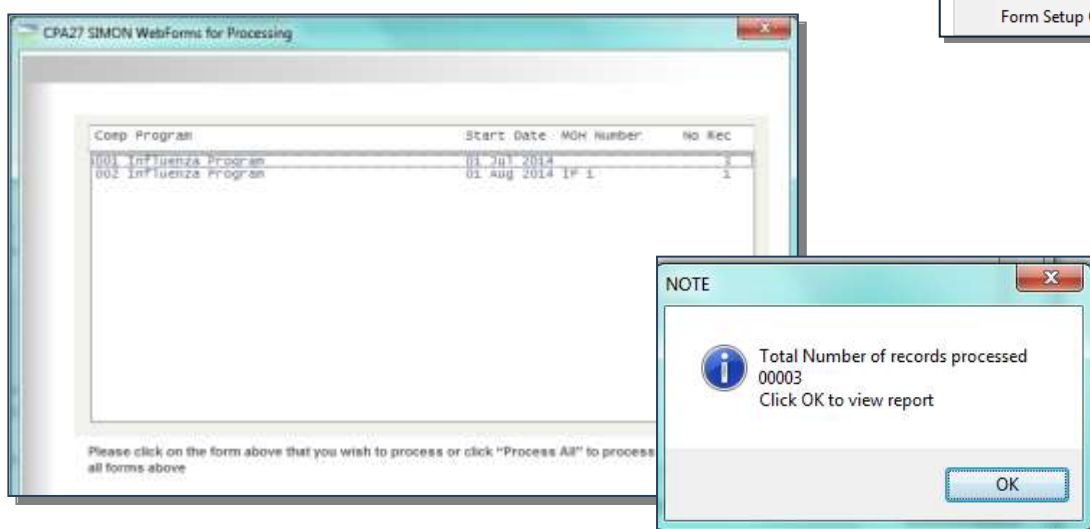
Introduction

    This will appear on the webform for the employee.   <a

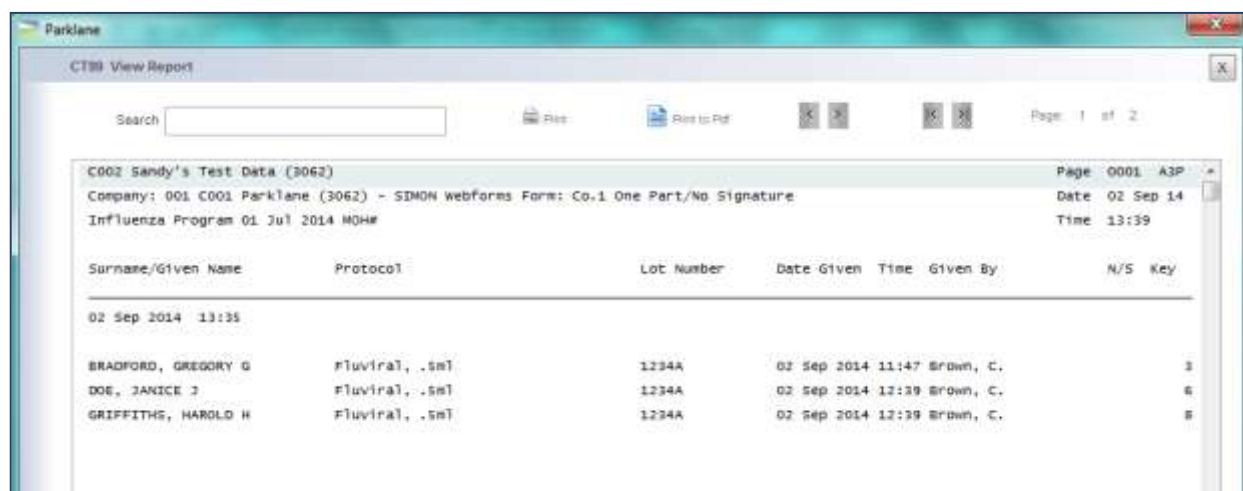
## Import Completed Web Forms

When protocols have been given and forms completed, they can be imported into SIMON using this feature. In order to import SIMON Web Form submissions into the SIMON module, you will need to select **Import Completed Web Forms** from the **Options** dropdown menu. This feature may be run as often as necessary.

This panel shows all batches that are ready to be imported from SIMON Web Forms into SIMON. The batches are separated by Company and by Program. You can either **Process All** or double click on one Company or Program.



You will get a **Note** indicating the number of records processed. Select **OK**, and the report will display the records that have been imported into SIMON. This report is cumulative for the day. To see a complete report, go to **SIMON Reports, A3P Web Form Import**.



## Auto Import Option

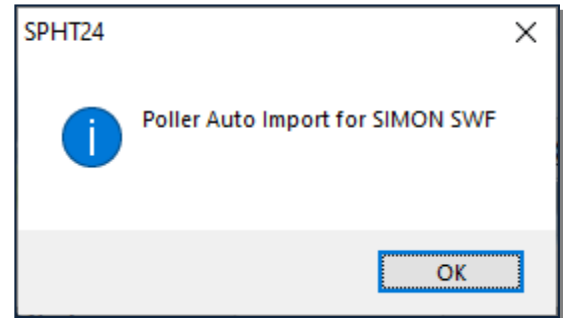
An option exists to automatically import completed SIMON web form submissions into the SIMON module. The system will automatically check for imports every five minutes. To turn on this option you must first exit the Parklane program.

On the login screen enter the following:

Leave the User ID **blank**

In the Password Field Enter: /SIMONAUTO

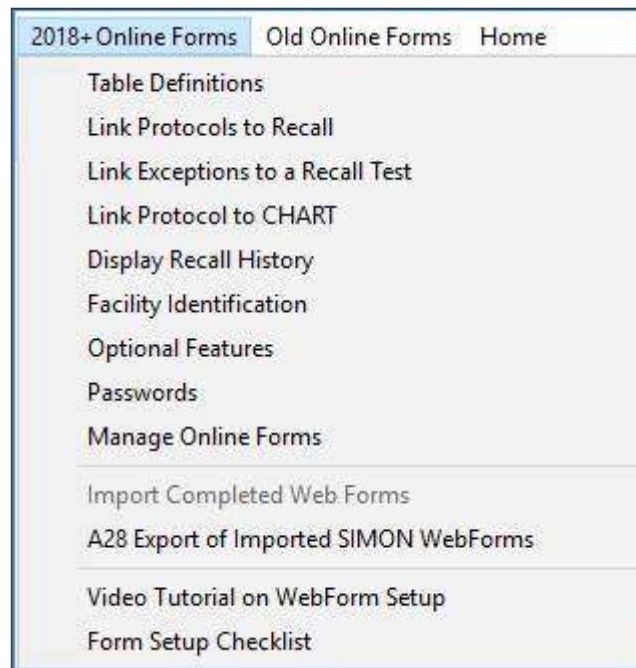
You will receive the following message:



You may now log back in with your customary log in ID and Password.

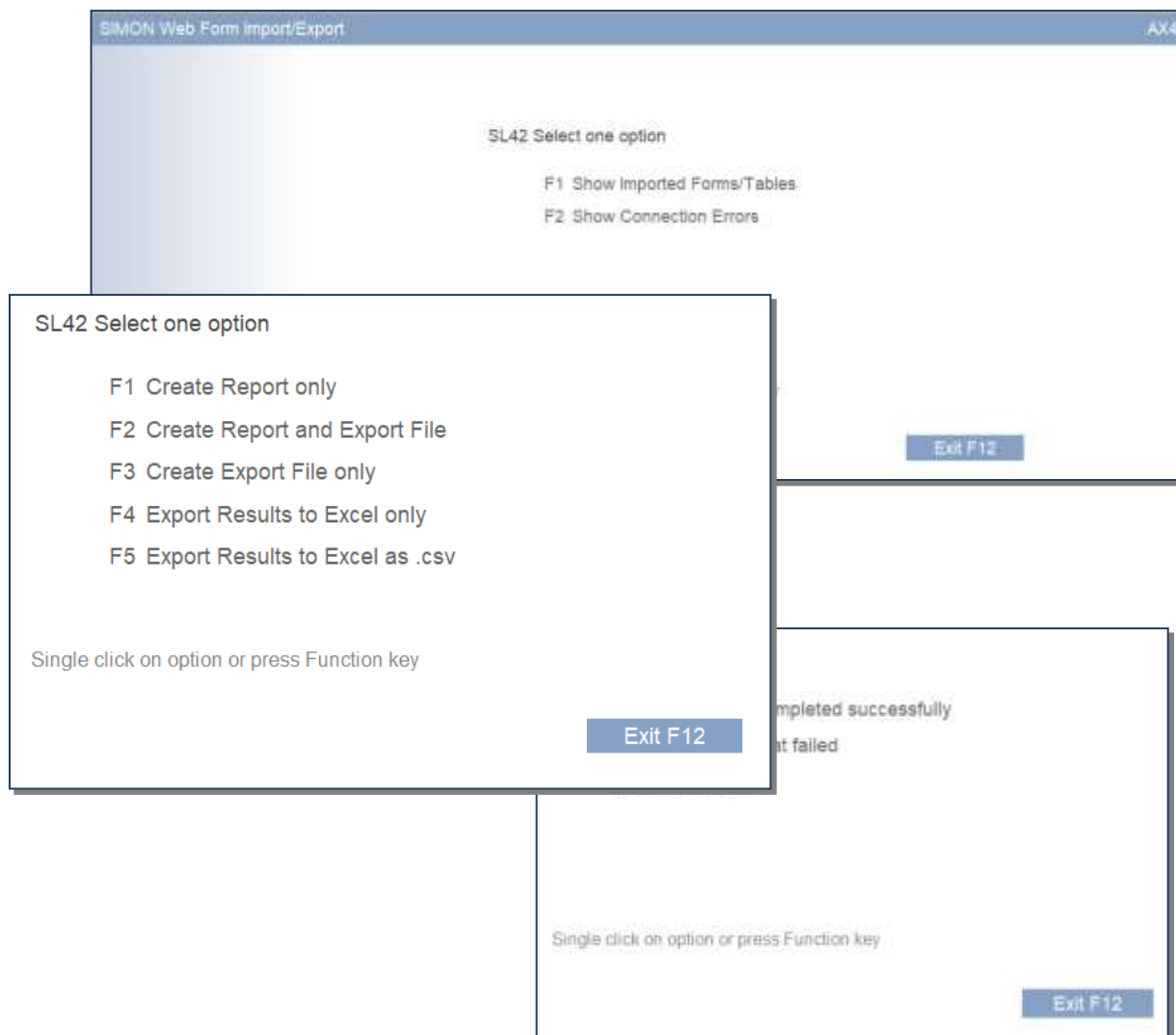
Your system will now automatically import any newly completed SIMON Web Forms to SIMON every five minutes.

Once the **Auto Import Option** is activated, it is recommended that the manual **Import Completed Web Form** option be grayed out via Security on all users with access to SIMON.



## AX4 Report of Imported SIMON WebForms

SIMON provides the option to show either the Imported Forms/Tables or show the Connection Errors through the AX4 report.



Also provided is the option to generate a report and/or to generate a report and an export file in Excel or in a csv (comma separated value file).

## Video Tutorial

For those who prefer a visual overview of the SIMON module a video is embedded giving a tutorial on the Webform setup process.

## Form Setup Checklist

Also provided in the drop down menu is a checklist to assist in the setup of webforms. Both of these feature will require internet access as they link directly to the Parklane site.

<b>Summary Setup: SIMON and SWF – 2018</b>			
Below is a step-by-step summary to assist in setting up your new SIMON program and SIMON Web Form. Included is: the order each step is to be completed (by panel name), list of items on that panel and the importance.			
Top Menu	Item	To-do checklist	Importance
<b>Online Form Setup</b>	1. <b>Table Definitions – CPAM</b>	<input type="checkbox"/> Add any additional items to tables	Optional
	2. <b>Link Protocols to Recall – CRAJA</b>	<input type="checkbox"/> Link protocols to tests in Recall	Optional
	3. <b>Facility Identification – CPAAC</b>	<input type="checkbox"/> Add any additional facilities	Optional
	4. <b>Passwords – CRAK</b>	<input type="checkbox"/> Add login, names, passwords and user IDs	Mandatory
<b>Manage Online Forms</b>	5. <b>Form Description – CPAAC</b>	<input type="checkbox"/> Program name <input type="checkbox"/> Description on Form (Form Name) <input type="checkbox"/> Ministry number <input type="checkbox"/> Include staff lookup by card swipe <input type="checkbox"/> Include facility <input type="checkbox"/> Include nonstaff <input type="checkbox"/> Include nonstaff category <input type="checkbox"/> Include miscellaneous field <input type="checkbox"/> Include destinations	Mandatory Mandatory Optional Optional Optional Optional Optional Optional
	6. <b>Introduction – CPAAM</b>	<input type="checkbox"/> Complete introduction to appear at the top of webform <input type="checkbox"/> Enter URL for further information	Recommended Optional
	7. <b>Questions – CPAQ</b>	<input type="checkbox"/> Check: Include Question Section <input type="checkbox"/> Add questions to appear on webform <input type="checkbox"/> Choose question types	Recommended Mandatory (only if questions are included) Mandatory (only if questions are included)
	8. <b>Consent – CPAAD</b>	<input type="checkbox"/> Check: Include Consent Section <input type="checkbox"/> Enter Consent Disclaimer <input type="checkbox"/> Check: Allow for Signature <input type="checkbox"/> Click: Signature w/ mouse or pad <input type="checkbox"/> Check: Provide for Date and Time	Recommended Optional Optional Mandatory (only if signature is included) Optional

SIMON & SIMON Web Form Setup – last revised: August 28, 2018

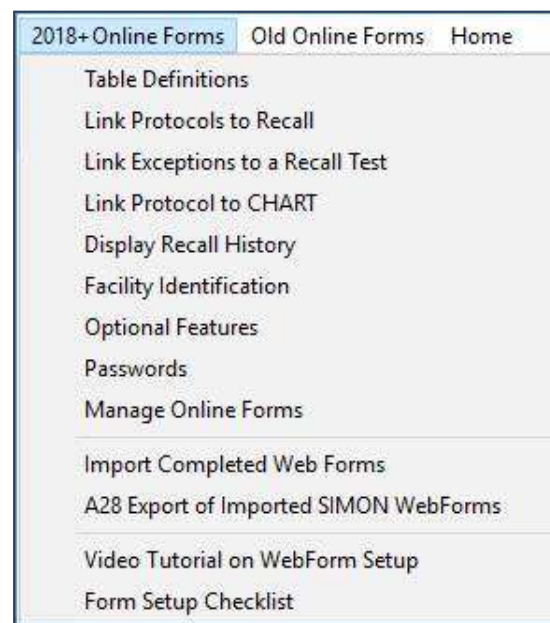
# SIMON Web Forms

Parklane's SIMON module has the option whereby Forms can be created and placed online for remote completion. The data collected via these forms will be electronically transferred into the SIMON module. There are a number of steps required to set up the forms process.

From the features under **Options**:

1. The **Table Definitions** must be completed
2. The **Link Protocols to Recall** must be completed
3. In **Passwords**, ensure all users giving protocols have an enabled account
4. Under **Options**, ensure the status of the form is Active
5. A company logo may be added to web forms. This logo will appear in the upper-right corner on certain pages. The logo can be added initially by your I.T. department.

Once these steps are complete, the forms can be accessed remotely and the data will flow seamlessly to the SIMON module.



SIMON web forms can use any modern Web Browser (Internet Explorer 11+, Edge, Chrome, Firefox). For Internet Explorer, the system needs IE11 or above. The Options use a new Topaz plug-in that is cross-browser compatible. You may need to speak to you IT department to install this plug-in on your computer. Alternatively, you can also use a mouse to sign.

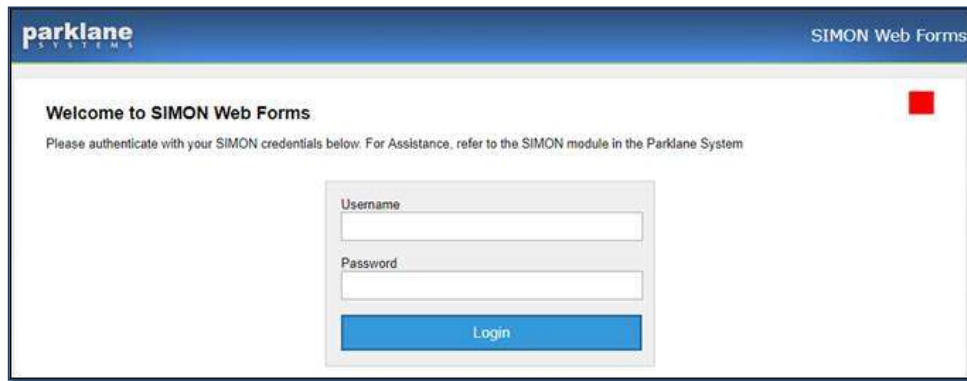
A desktop icon/bookmark will lead to the menu of Available Web Forms that are installed on your system.



The Web Extension menu panel also provides further information regarding **Settings** and **Product Versions**.

# Entering SIMON Web Form

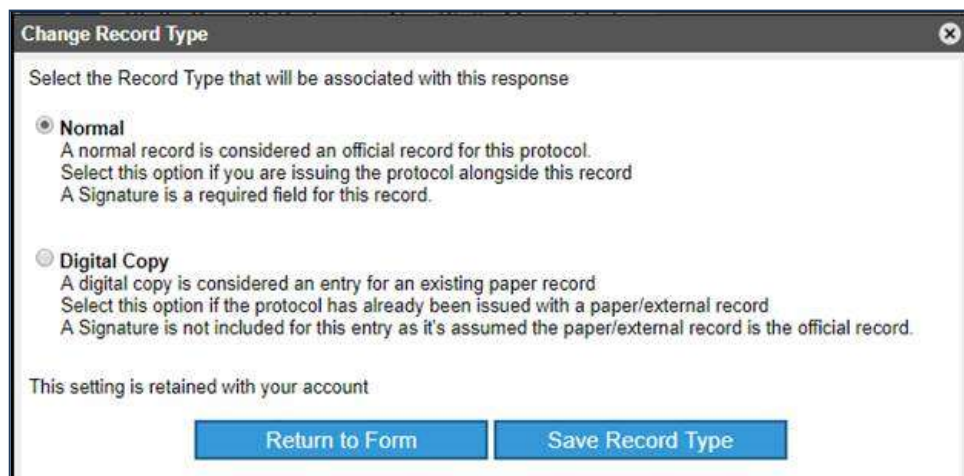
Select **SIMON Web Forms** from the Web Extension menu. The Login screen will open where you will enter your Username and Password.

The screenshot shows the login interface for the SIMON Web Forms. At the top, there is a blue header bar with the 'parklane SYSTEMS' logo on the left and 'SIMON Web Forms' on the right. Below the header, a message reads 'Welcome to SIMON Web Forms' followed by 'Please authenticate with your SIMON credentials below. For Assistance, refer to the SIMON module in the Parklane System'. In the center, there is a login box with two input fields labeled 'Username' and 'Password', and a blue 'Login' button at the bottom.

Once logged in, the **Form List** of active programs will appear. Select a form for completion.

The screenshot displays the 'Form List' page after a successful login. The header is identical to the login screen. The main content area is titled 'Form List' and includes the instruction 'Select a form below to fill out'. There is a list of forms: 'Influenza 2018-2019 Flu Campaign' (highlighted in green), 'Mask Fit Testing N95 Questionnaire', and 'Sarah Test'. At the bottom of the list, there is a blue 'Log Out' button.

Once the program is selected and opens, an options is provided to Change Record Type. The Record Type refers to the entry of a record either as the protocol is being issued, or the entry of a paper record in which the protocol was already given and is only now being electronically recorded.

The screenshot shows a 'Change Record Type' dialog box. It has a title bar with a close button. The text inside says 'Select the Record Type that will be associated with this response'. There are two radio button options: 'Normal' and 'Digital Copy'. The 'Normal' option is selected. Below each option is a description: 'Normal' is described as an official record requiring a signature, while 'Digital Copy' is for existing paper records and does not require a signature. At the bottom, it states 'This setting is retained with your account' and provides two buttons: 'Return to Form' and 'Save Record Type'.

Returning to the form, the system provides options for the selection of an individual. The default options is Staff –

**Manual Search** wherein entering the **Last Name** and selecting **Search** will result in a list of Staff matching the entered criteria. Entering **First Name** and/or **Employee ID** will further narrow the search results. Select the employee to open, verify the demographic detail provided and click **Next** to continue.

**Flu Program 2020** Change Record Type

Staff - Manual Search | Staff - Scan ID Badge | Non-Staff - Manual Search

Search for an employee using by name or employee ID. Partial Searches are allowed.

Last Name: black | First Name: sara | Employee ID: | System Key: | Search

1 Record was found. Select their details below

First Name	Last Name	Department	Position	System Key	Company
SARA	BLACK	9991000000	ASSOCIATE	10-92	3051 Claudette/Karen Test

Select

Return to Main Menu Next >>

**Flu Program 2020** Change Record Type

Staff - Manual Search | Staff - Scan ID Badge | Non-Staff - Manual Search

Search for an employee using by name or employee ID. Partial Searches are allowed.

Last Name: black | First Name: sara | Employee ID: | System Key: | Search

1 Record was found. Select their details below

First Name	Last Name	Department	Position	System Key	Company
SARA	BLACK	9991000000	ASSOCIATE	10-92	3051 Claudette/Karen Test

Select

Verify the demographic information for **SARA BLACK** and click the **Next >>** button below

First Name: SARA | Last Name: BLACK

Birth Date: 1965/02/02 | Gender: Female

Address: 123 SMITH STREET | Address 2:

City: LONDON ONTARIO | Province: ON

Postal Code: N6P 1J6 | Email Address: c.everitt@parklanesys.com

Phone: 519-657-3387

Return to Main Menu Next >>

Selecting the **Staff – Scan ID Badge** option allows for the scanning or swiping of an employee's ID badge wherein the badge number will appear in the **Employee Badge** box. Select **Search** to access the employee, verify the demographic detail provided and click **Next** to continue.

**Flu Program 2020** Change Record Type

Staff - Manual Search | **Staff - Scan ID Badge** | Non-Staff - Manual Search

Scan or Swipe an employee ID badge into the box below. When finished, click "Search"

Employee Badge: | Search

Return to Main Menu Next >>

The remaining option is **Non-Staff – Manual Search** wherein the user can manually enter the details of the non-staff individual or search for previously entered non-staff in a multi-step program. Enter the name and click Search. If a record is not found, add a new non-staff by selecting **New Record**. Once entered, click **Next** to continue.

**Flu Program 2020** Change Record Type

Staff - Manual Search   Staff - Scan ID Badge   **Non-Staff - Manual Search**

Search for an Non-Staff record by name. Partial Searches are allowed.  
If a record is not found, you'll be able to add a new Non-Staff record

Last Name:    First Name:    Birth Date:    Non-Staff Category:    System Key:    Search

0 Records were found. Select the record that corresponds with the Non-Staff you're looking for. If not listed, select New Record

**New Record**

Verify the demographic information for **brady** and click the **Next >>** button below

First Name:    Last Name:

Birth Date:    Gender:

Address:    Address 2:

City:    Province:

Postal Code:

Phone:    Email Address:

Non-Staff Category:

Return to Main Menu   **Next >>**

Should a multi-step program online form be chosen, SIMON will allow you to search previously entered non-staff. This only includes any non-staff previously entered within the same multi-step program, thus allowing you to view any previously dispensed protocols (vaccines).

**COVID Immunization** Change Record Type

Staff - Manual Search   Staff - Scan ID Badge   **Non-Staff - Manual Search**

Search for an Non-Staff record by name. Partial Searches are allowed.  
If a record is not found, you'll be able to add a new Non-Staff record

Last Name:    First Name:    Birth Date:    Non-Staff Category:    System Key:    Search

3 Records were found. Select the record that corresponds with the Non-Staff you're looking for. If not listed, select New Record

Name	Category	Declination	Pfizer Covid 1	Pfizer Covid 2	Moderna Covid 1	Moderna Covid 2	Declined Covid Vaccine	COVID Vaccine Elsewhere	
George Smith	Volunteer								Select
JOHN SMITH	Research Volunteer		✓						Select
sarah smith	Research Volunteer				✓				Select

**New Record**

Return to Main Menu   **Next >>**

The subsequent panel displays this programs **Introduction** text, **Questions** and **Consent** text for the individual to read, select answers to the questions and sign. At this point, the individual has the option to decline the program and associated protocol(s).

**Influenza** Declination

**RICHARD BOYD**

**Introduction**  
Consent for Administration of Seasonal Influenza Vaccine (Influvac) 2018 - 2019

**Benefits:**

Unless there is a medical reason not to, you can benefit from getting the flu shot. Getting the flu shot is especially important for people who are at high risk of developing complications from influenza such as pneumonia. The elderly, children and others are at high risk of complications. It is very important for you to be immunized even if you are healthy because you work in an environment where you could spread influenza to others at high risk of serious complications.

Influenza vaccine is the best way to protect against influenza infection. You need to get vaccinated every year because even if the viruses in the vaccine are the same as the year before, immunity to influenza viruses declines over time and may be too low to provide protection after one year.

The flu shot is recommended for pregnant women at all stages of pregnancy as well as those who are breastfeeding. This is because even healthy pregnant women have more influenza-associated hospitalizations than women who are not pregnant. Immunization of pregnant/breastfeeding women also has the advantage of potentially protecting the baby as the mother's flu antibodies can travel through the placenta and breast milk.

**Risks:**

It is impossible to develop influenza from the inactivated influenza vaccine as the virus in the vaccine has been killed.

Common (occur in every 1 in 100 up to 1 in 10 people): The most frequent side effect of influenza vaccination is soreness of the vaccination site. Redness, swelling and bruising have also been reported. These reactions generally are mild and rarely interfere with one's ability to conduct usual daily activities. Fever, malaise, aching muscles/joints, enlarged lymph nodes, headache, shivering, sweating, fatigue and other systemic

**Questions**

Are you feeling well today?

☐ Yes

☐ No

**Consent / Signature**

I confirm that I have read the attached influenza vaccine information sheet regarding the risks, benefits and potential side effects associated with the influenza vaccine. I am aware that I must contact Health Link if I have any questions, or if I have any concerns about receiving the influenza vaccine.

I have had the opportunity to have my questions answered by calling the local public health centre or Health Link. I am satisfied with and understand the information I have been given, and I consent to receiving the influenza immunization as determined to be most appropriate by the immunizer.

I understand that I may, at any time, withdraw this consent to the influenza immunization by calling the local public health centre.

I confirm that I have the legal authority to provide consent to this immunization.

**Sign**

**Date & Time of Consent**

Date:

Time:

**<< Previous** **Next >>**

Click the **Sign** button to open the Signature box. The signature of the individual can be entered using a mouse or on-screen.

Click **Done Signing** and the **Date** and **Time** of the consent may auto-fill depending on the setup of the program, and the individual's signature will be applied to the record. Click **Next** to proceed.

**Signature**

Method: Mouse / On-Screen

Please sign within the box below. When you are finished signing, Click "Done Signing"

*R. Boyd*

**Return without Signing** **Clear Signature** **Done Signing**

The subsequent panel requires the selection of the **Facility Name**, the **Protocol** given, the **Lot Number** (if applicable), the **Injection Site** (if applicable), and the **Date** and **Time** the protocol was given. Some of these fields may auto-fill based on the setup of the program.

The screenshot shows a form titled "Influenza" with a "Declination" button in the top right. The patient name "RICHARD BOYD" is displayed at the top. The "Facility" section has a label "Select the corresponding facility" and a dropdown menu showing "PARKLANE". The "Protocol" section lists several options: "Fluviral .5ml" (checked), "Vaxigrip .5ml", "Agriflu .5ml", "Fluzone .75ml", "Tylenol", and "Influvac 0.5 ml". Below the protocols, there is a "Lot Number" field with a dropdown showing "AB123456" and a label "Select the corresponding Lot Number for the protocol. If a lot number is not listed, select 'Not Listed' and enter the Lot Number". The "Injection Site" section has radio buttons for "Rt Arm", "Lt Arm", "Thigh", and "Buttocks", with "Rt Arm" selected. At the bottom, there are fields for "Date & Time Protocol Given At", with "Date" set to "2018/11/20" and "Time" set to "10:25 AM", each with a "Now" button.

In addition, the individual administering the protocol will select their name from the drop-down list and click **Sign** button to open the Signature box.

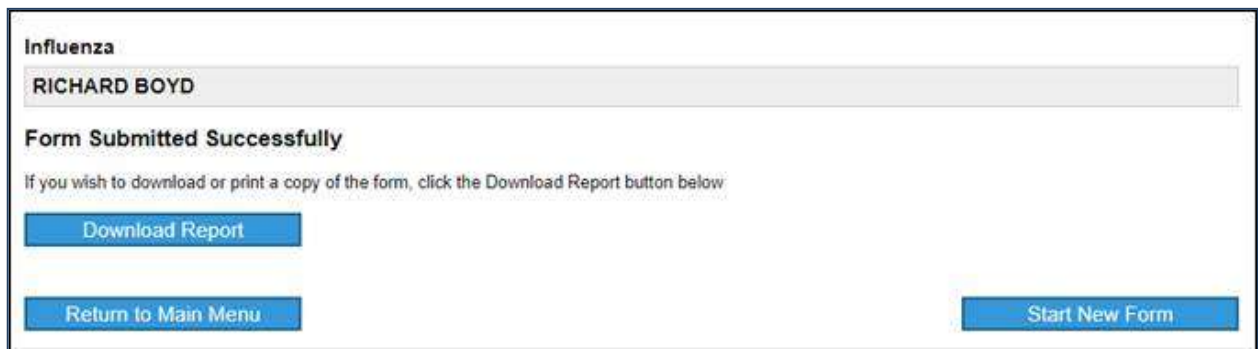
The screenshot shows the "Administered By" section of the form. It has a label "Select your name from the drop-down list" and a dropdown menu showing "Claudette Everitt". Below this is the "Staff Authorization / Signature" section, which contains a "Sign" button. At the bottom, there are fields for "Date & Time", with "Date" set to "yyyy/mm/dd" and "Time" set to "HH:MM AM/PM", each with a "Now" button. Navigation buttons "<< Previous" and "Next >>" are at the bottom of the form.

The signature can be entered using a mouse or on-screen.



The screenshot shows a window titled "Signature" with a close button (X) in the top right corner. Inside the window, there is a text prompt: "Please sign within the box below. When you are finished signing, Click 'Done Signing'". To the right of this prompt is a dropdown menu labeled "Method:" with "Mouse / On-Screen" selected. Below the text is a large rectangular box with an orange border containing a handwritten signature in blue ink that reads "C. Everett". At the bottom of the window, there are three blue buttons: "Return without Signing", "Clear Signature", and "Done Signing".

Click **Done Signing** and the **Date** and **Time** of the signature may auto-fill depending on the setup of the program, and the individuals signature will be applied to the record. Click Next to proceed.



The screenshot shows a form titled "Influenza" with a patient name "RICHARD BOYD" displayed in a grey box. Below the name, it says "Form Submitted Successfully". A text prompt reads: "If you wish to download or print a copy of the form, click the Download Report button below". There are three blue buttons: "Download Report" on the left, "Return to Main Menu" at the bottom left, and "Start New Form" at the bottom right.

## Declination

Should the individual opt to decline the program and associated protocol(s), click the **Declination** button on the top-right of the initial entry panel.

The screenshot shows a web form titled "Influenza" for a patient named "RICHARD BOYD". On the top right, there is a blue button labeled "Declination". Below the patient name, there is a section for "Introduction" with the text "Consent for Administration of Seasonal Influenza Vaccine (Influvac) 2018 - 2019". A "Benefits:" section follows, containing a paragraph of text about the importance of the flu shot.

The **Protocol Declination** panel will open, and the user will select the **Reason** the individual is declining from the drop-down list.

This screenshot shows the "Protocol Declination" panel overlaid on the main form. The panel has a title bar with a close button. Inside, it says "I do not accept the Protocols listed below:" followed by a bulleted list of vaccines: Fluviral .5ml, Vaxigrip .5ml, Agriflu .5ml, Fluzone .75ml, Tylenol, and Influvac 0.5 ml. Below the list is a "Reason:" dropdown menu. The dropdown is open, showing three options: "I decline", "I am exempt for a medical reason", and "An alternative is not available". At the bottom of the panel are two buttons: "Return to Form" and "Next".

Click the **Next** button to open the Signature box. The signature of the individual can be entered using a mouse or on-screen.

The screenshot shows the "Signature" box. It has a title bar with a close button. The text inside says: "You have not accepted the protocol(s) for the following reason: I decline. Please sign within the box below. When you are finished signing, Click 'Done Signing'". Below this text is a large orange rectangular box containing a handwritten signature in blue ink that reads "R. Boyd". At the top right, there is a "Method:" dropdown menu set to "Mouse / On-Screen". At the bottom, there are three buttons: "Return without Signing", "Clear Signature", and "Done Signing".

Click **Done Signing** and the final panel of the program will open to indicate the Protocol Declination was submitted successfully. The individuals signature, the date and the time of the declination will be applied to the record. The **Download Report** button will produce a printable copy of the completed form. The **Start New Form** will return the user to the name search panel for this program, which will retain several fields from the previous record to reduce data entry. The **Return to Main Menu** will return the user to the Form List panel to select an alternative program.

The screenshot shows a web interface for the Influenza program. At the top, the word "Influenza" is displayed. Below it, a grey box contains the name "RICHARD BOYD". The main heading is "Protocol Declination Submitted Successfully". Below this heading, a line of text reads: "If you wish to download or print a copy of the form, click the Download Report button below". There are three blue buttons: "Download Report" is positioned below the text; "Return to Main Menu" is at the bottom left; and "Start New Form" is at the bottom right.

Influenza

RICHARD BOYD

**Protocol Declination Submitted Successfully**

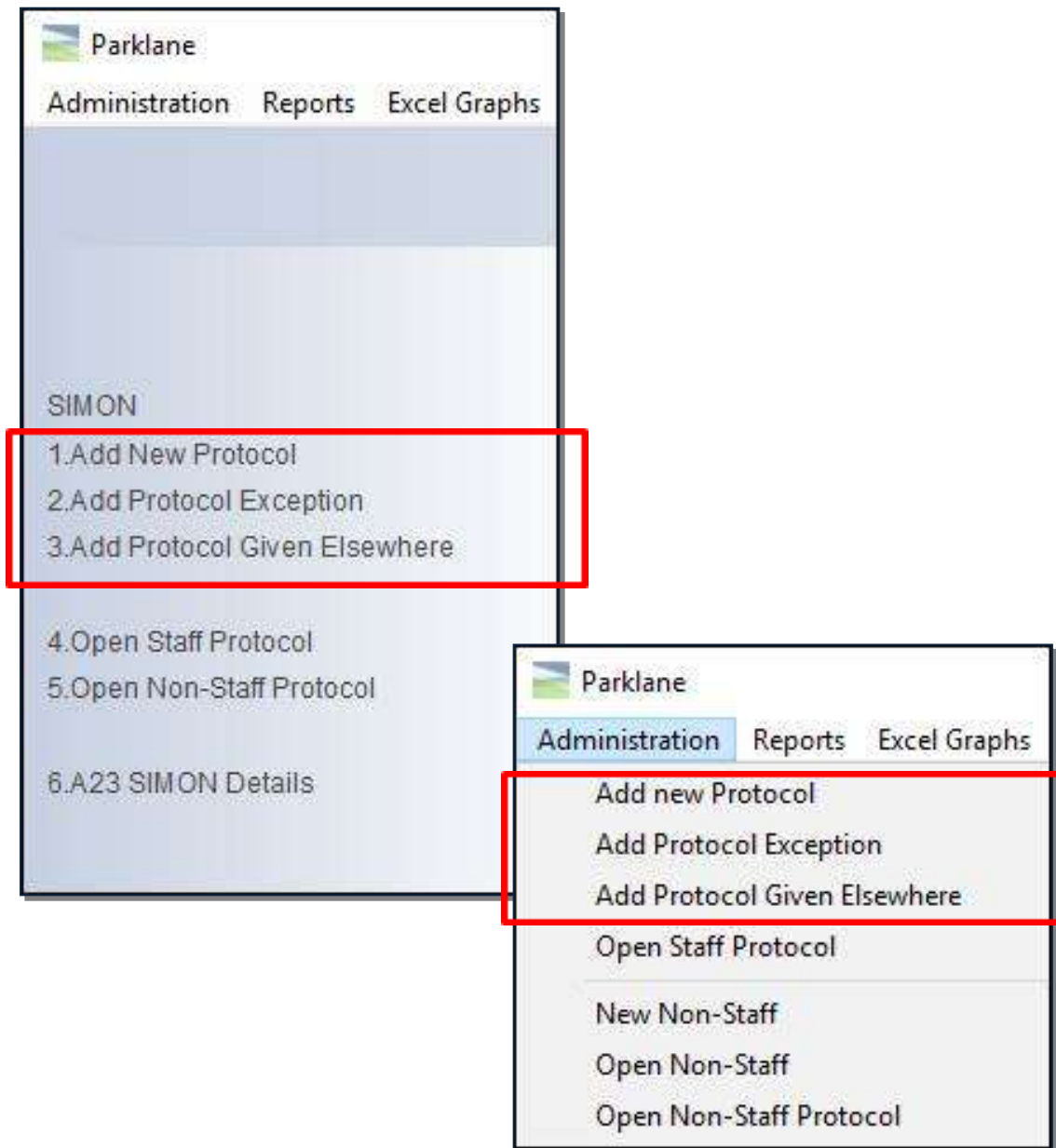
If you wish to download or print a copy of the form, click the Download Report button below

Download Report

Return to Main Menu

Start New Form

# Entering SIMON Records



There are three types of SIMON records that can be entered. You can:

- Add New Protocols
- Add Protocol Exception
- Add Protocol Given Elsewhere

## Name Search Options

Select the method that you want to use to enter SIMON records:

- Name Search
- Name Search on the Non-Staff maintained in the SIMON module
- Add Non Staff
- Scan Employee (if barcodes are present in Personal Data)

CPA20 Protocol Given

Name Search F2

Name Search Non Staff F3

Add Non Staff F4

Scan Employee F5

Exit F12

Clicking on the **Name Search F2** button accesses the Search Panel. Using the options provided, select the appropriate employee, which accesses the SIMON Record panel for completion.

CPA82 Search for Staff

First Name  Search keyword  Go F7

Last Name  Go F4 System Assigned Key  Go F3

Department Code  Employee no. or id.  Go F2

F5 Get last employee accessed No Employee has been accessed yet

Claudette Karen Test Data X

Go F6 Show last 25 employees you accessed, by last time accessed.

Go F9 Show last 25 employees you accessed, by last name.

To search for Non-Staff, click on the **Name Search Non-Staff F3** button which will access the Search Panel. Using the options provided, select the appropriate non-staff, which accesses the SIMON Record panel for completion.

If you are set up to scan ID badges (see Personal Data), click on the **Scan Employee** button, then scan the ID badge, which will access the SIMON Input screen.

Please scan the next recipient that protocol will be issued to.

## Add New Protocol

1. Select the **Program**, the **Facility** (if applicable) and the **Protocol that will be administered** from the drop downs.
2. Enter the **Date** and **Time** that consent was given and press tab. The date and time that the protocol was given will automatically be completed with the same date.
3. Complete the **Protocol Given By** using the drop down, then check the box to the right to indicate the protocol was given.
4. Complete the **Immunization Site** using the drop down.
5. Enter the **Lot Number** (if applicable) and check the box to the right to confirm the lot number is correct.
6. If an additional protocol is to be given, click on the **Next Medication**, otherwise, click on **Next Esc** to select the next employee or non-staff.

CPA02 Program

Date Last Taken  Days Given  Total Given  Adverse

Date First Taken  Days Left  Total Left

Prescription

Program  Facility

Protocol that will be administered  Override ☐ Yes

WARNING this Program may require protocols to be taken by this recipient 01 of 00  
Any warning message shows here Any warning message shows here

Was consent obtained? ☒ Yes Date/Time  Date/Time Given

Protocol Given By  ☐

Immunization Site

Lot Number  ☐

Entered by SARA Adverse Effect F4 Next Medication F3

Next Esc Home F11 Menu F12

**NOTE:** When entering the next record, SIMON will remember Program, Facility, Protocol, Given By and Lot# - thereby expediting the data entry process.

## Add Protocol Exception

Some employees may be exempt from a protocol. Click on **Add Protocol Exception** from the SIMON sidebar

1. Using the search employee or non staff, select the appropriate person.
2. Complete the Protocol Exception panel by providing the Program and the Facility (if applicable), and indicate which exception applies.
3. If these exceptions have been linked to a specific Recall test, Recall will also be populated.

SIMON

1. Add new Protocol

2. Add Protocol Exception

3. Add Protocol Given Elsewhere

CPA03 Protocol Exception

Program  
06 Sep 2018 Influenza

Facility  
PARKLANE

☐ Medically Exempt  
☐ No Alternative  
☐ Declined

Date / Time 27/11/2018 09:54

Test	Recall Test Taken Date
FLU VAC	31 Oct 2018

Entered by SARA

## Add Protocol Given Elsewhere

Some employees may receive their protocol (eg: flu vaccine) from either a public clinic or their family physician rather than at your facility. To track these individuals, you may wish to record those as **Protocol Given Elsewhere**.

SIMON

1.Add New Protocol

2.Add Protocol Exception

3.Add Protocol Given Elsewhere

1. From the sidebar, click on **Add Protocol Given Elsewhere**.
2. Using the search employee or non staff, select the appropriate person.
3. Complete the **Given Elsewhere** panel by providing the Program, the Facility (if applicable), and indicate which Protocol was given along with the Date, Time and name of clinic or physician.
4. If you wish to track whether documentation was received, select or deselect the checkbox as appropriate
5. If the Protocol has been linked to a specific Recall test, Recall will also be populated.

CPA44 Given Elsewhere

Program  
06 Sep 2018 Influenza

Facility  
PARKLANE

Protocol  
Fluviral .5ml

Date / Time Given  
21/11/2018 17:00

Name of Doctor or Clinic  
Dr. R. Benson, GP

☒ Documentation received

Adverse Effects

Test Recall Test Taken  
Date  
FLU VAC 31 Oct 2018

Entered by SARA

# Opening SIMON Records

## Open Staff & Non-Staff Protocol

To open a previously entered SIMON Record, select either Open Staff Protocol or Open Non-Staff Protocol. Search for the individual and select record.

These panels cannot be edited, however, the record can be cancelled if required.

### SIMON

- 1.Add New Protocol
- 2.Add Protocol Exception
- 3.Add Protocol Given Elsewhere
- 4.Open Staff Protocol
- 5.Open Non-Staff Protocol
- 6.A23 SIMON Details

CPA84 Program

Start Date: 06/09/2018

MOH number:

Facility: PARKLANE

Program: Influenza

Consent obtained? ☒ 26/11/2018 08:00

Date / Time given: 27/11/2018 08:00 ☒ Given

Protocol: Fluviral .5ml

Protocol given by: Michelle Kennedy

Immunization site: RtArm

Lot number: 23456

Quantity Given: 1 Prescription:

Given elsewhere ☐ Documentation received ☐

Doctor:

Medically exempt ☐ Decline ☐ No Alternative ☐

Adverse effect

CPA84 Program

Start Date: 06/09/2018

MOH number:

Facility: PARKLANE

Program: Influenza

Consent obtained? ☒ 26/11/2018 08:00

Date / Time given: 27/11/2018 08:00 ☒ Given

Protocol: Fluviral .5ml

Protocol given by: Michelle Kennedy

Immunization site: RtArm

Lot number: 23456

Quantity Given: 1 Prescription:

Given elsewhere ☐ Documentation received ☐

Doctor:

Medically exempt ☐ Decline ☐ No Alternative ☐

Adverse effect

Additional adverse effects

Entered by: SARA 27/11/2018

# Action Email Setup

The **Action Email Setup** allows the setup of email notifications to be sent to various personnel when a user performs one of the actions shown. Ensure that the email protocol has been set up under the Maintenance panel by clicking **Email Technical Setup**. This may require consultation with your I.T. Support Team.

**Note:** Before using this feature, all users and recipients must be setup in **Security**.

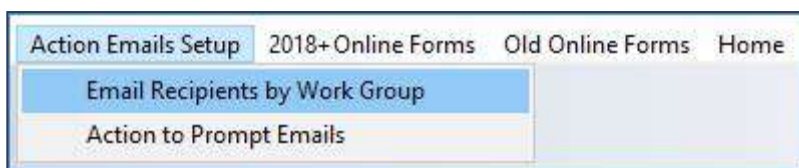
The screenshot shows the 'Maintenance' panel with a sidebar containing four items: '1. Run Data Transfer Update', '2. Email Technical Setup', '3. MySQL ODBC DSN Parklane', and '4. Data Transfer Log (AutoRun)'. The 'Email Technical Setup' item is selected. The main window displays the 'CF81 - SMTP Server Information' dialog box. The dialog box has the following fields and options:

- SMTP Server Name:** A text box containing '10.0.0.10'. Below it, a note says: 'Set the SMTP-server to the name or IP address of the SMTP server you will be using to send an email.'
- SMTP Port Number:** A text box containing '025'. Below it, a note says: 'Set the SMTP-PORT to the port number the SMTP server listens on. Most use the default port of 25.'
- SMTP Authentication:** A dropdown menu set to '02'. To its right are four radio button options: '0 - No Authentication (default)', '1 - CRAM-MD5', '2 - Auth', and '3 - Plain'. Below these, a note explains: 'Set the SMTP-AUTHENTICATION to the authentication method desired. There are 4 different authentication protocols supported by SMTPSimple, in addition to allowing no authentication. CRAM-MD5 uses an MD5 hash key for password authentication. Auth and Plain are two other methods of password negotiation and authentication. Set the value as appropriate to your situation.'
- SMTP User Id:** A text box containing 'd.wells@parklanesystems.com'. To its right, a note says: 'Complete only if the authentication method chosen requires it.'
- SMTP Password (enter TWICE):** Two text boxes, each containing a series of dots. To their right, a note says: 'Complete only if the authentication method chosen requires it.'
- SMTP From Email:** A text box. To its right, a note says: 'Complete only if SMTP server must use internal domain name.'
- Default:** A label followed by the text 'noreply@parklanesys.com or noreply@yourdomain.com' and a button labeled 'Use Default F9'.
- Buttons:** At the bottom left is a button labeled 'Send Test Email - F5'. At the bottom right is a button labeled 'Exit F12'.

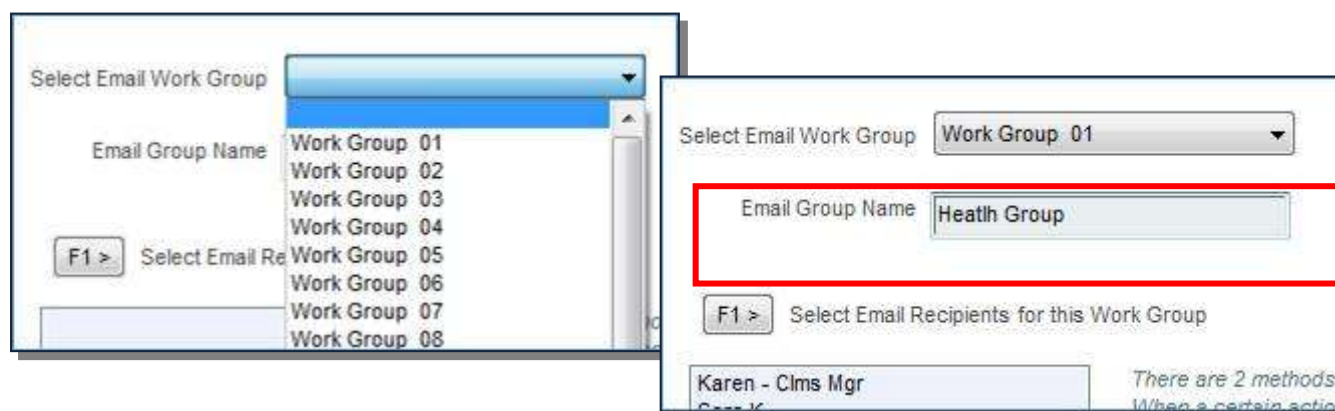
There are two options for sending Action Emails. An email will be sent to everyone that is in the email list for the specific **Action**, or an email will be sent to those who are in the same **Work Group** as the User.

## Email Recipients by WorkGroup

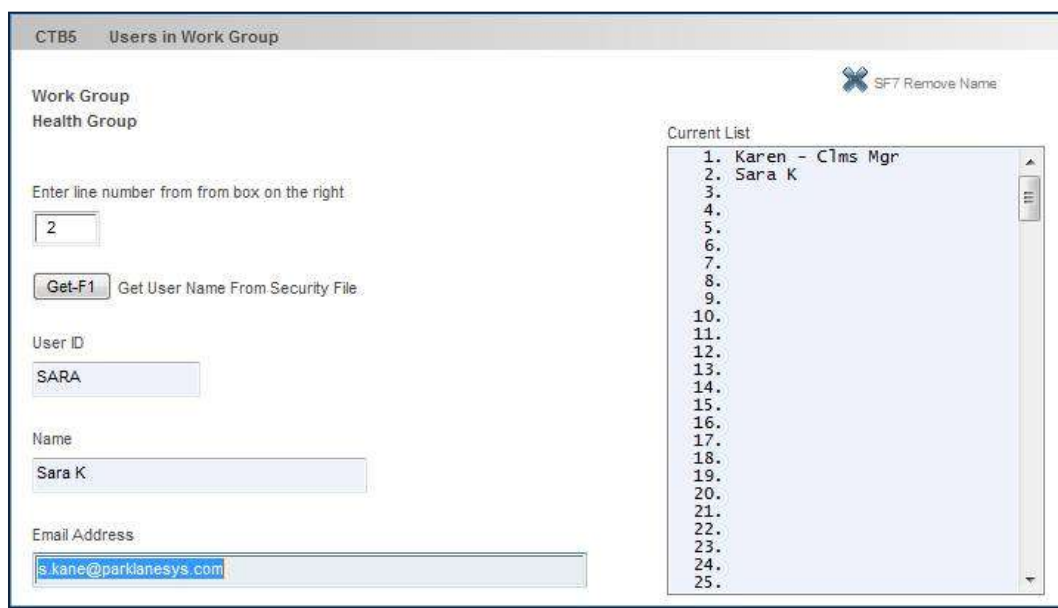
**Work Groups** must be pre-defined when choosing the second option. Click on **Options/Action Emails/Email Recipients by Work Group**.



Click on the drop down for **Select Email Work Group** and click on a work group heading to rename.



Click on **F1>** and begin to select the email recipients for this Work Group. Enter the next available line number and click **Get-F1** to select the email recipient from the list provided. Up to 200 email recipients may be selected per Work Group.



When an **Action** occurs, the system will determine what **Work Group(s)** the User is located in and will send an email to all other recipients within the Work Group(s).

## Action to Prompt Emails

To setup the **Action Emails** click on **Options/Action Emails/Action to Prompt Emails** and select the action(s) that should prompt an email notification.

For each Action shown, you can indicate which users will prompt an automatic email and which person(s) or workgroups will receive the email. Check the Action that should prompt an email.

**CPAB2 Action Emails**

*Make sure the email protocol has been setup under Maintenance*

Check the Actions that should prompt an email notification	Action By	Email To	
<input type="checkbox"/> Add Link to Recall	<input type="checkbox"/>	<input type="checkbox"/>	Email notifications can be sent to various personnel when a user performs one of the actions shown.
<input type="checkbox"/> Remove Link to Recall	<input type="checkbox"/>	<input type="checkbox"/>	For each action shown, you can indicate which users will prompt an automatic email and which person(s) will receive the email.
<input type="checkbox"/> Add Recall link Med-Exp/ No All/ Decline	<input type="checkbox"/>	<input type="checkbox"/>	Before using this feature, all users and recipients must be setup in Security.
<input type="checkbox"/> Remove Recall link Med-Exp/ No All/ Decline	<input type="checkbox"/>	<input type="checkbox"/>	How it works:
<input type="checkbox"/> Added /Change Employee Protocol override	<input type="checkbox"/>	<input type="checkbox"/>	Check the action that should prompt an email.
<input type="checkbox"/> Change Protocol Given Record	<input type="checkbox"/>	<input type="checkbox"/>	Check the Action By box which will activate a pop-up window. Indicate the users that will prompt an email.
<input type="checkbox"/> Cancel Protocol Record	<input type="checkbox"/>	<input type="checkbox"/>	Check the Email To box which will activate a pop-up window. Indicate the people who will be the recipients of the email.
<input type="checkbox"/> Change Status to Pending	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Change Status to Active	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Change Status to Close	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Change Online Form after Activation	<input type="checkbox"/>	<input type="checkbox"/>	

Click the **Action By** box which will activate a pop-up window. On this window indicate the users that will prompt an email to be sent. Up to 120 users can be identified.

**CTB1 Users that should prompt an email**

**Action: Added/Change a Program Template**

Enter line number from box on the right

**Get F1** Get User Name From Security File

User ID and Name

CE Claudette Everitt

Email Address

c.everitt@parklanesys.com

**Current List**

1. Claudette Everitt
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.

SF7 Remove Name

Next, click the **Email To** box which will activate another pop-up window. On this window indicate the people who will be the recipients of the email. Up to 20 recipients can be identified.

CTB2 Email Recipients resulting from an action

Action: Added/Change a Program Template

☐ Send emails using Work Groups

Enter line number from box on the right

1

**Get F1** To select User Name from Security File.  
If not in Security, enter any ID, their name & email.  
Either way, click Submit to add to table.

User ID and Name

KFERRELL Karen - Clms Mgr

Email Address

k.ferrell@parklanesys.com

**Submit F2**

Current List

1.	Karen - Clms Mgr
2.	Jenn - Clms Mgr
3.	Sara K
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	
17.	
18.	
19.	
20.	

Alternatively, click on the check box to **Send emails using Work Groups**. Once checked, all other fields will be grayed out. As previously described, when an **Action** occurs, the system will determine what **Work Group(s)** the User is located in and will send an email to all other recipients within the Work Group(s).

CTB2 Email Recipients resulting from an action

Action: Added/Change a Program Template

☒ Send emails using Work Groups

Enter line number from box on the right

**Get F1** To select User Name from Security File.  
If not in Security, enter any ID, their name & email.  
Either way, click Submit to add to table.

User ID and Name

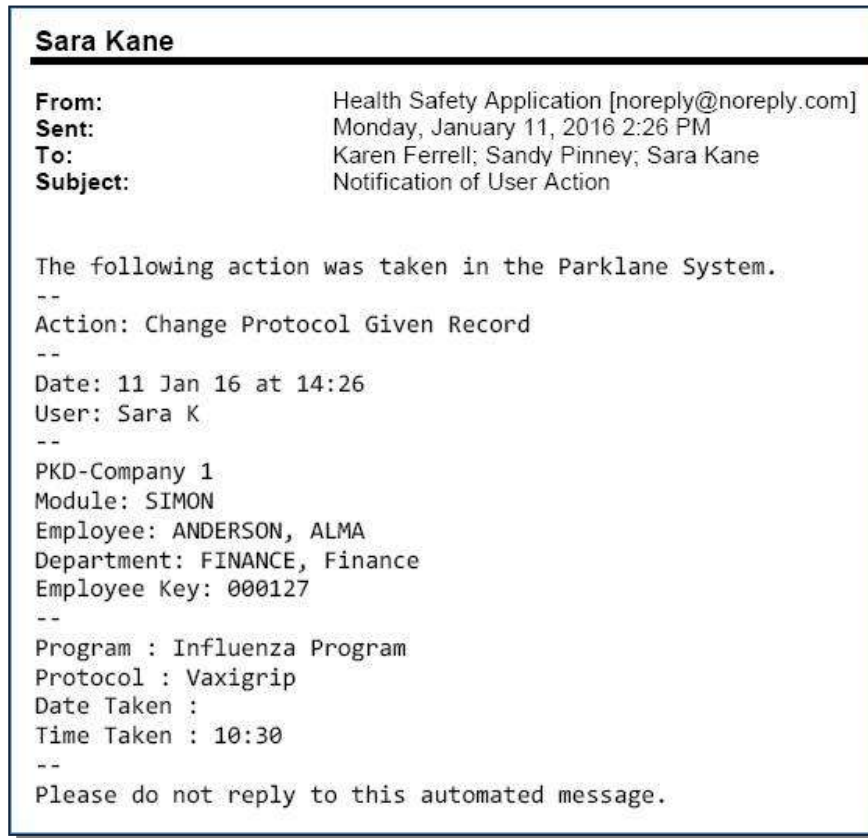
Email Address

**Submit F2**

Current List

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	
17.	
18.	
19.	
20.	

Each time an Action is executed by a listed User, the Recipient will receive an email advising that the Action occurred.



## Signature Capture with Tablets

Should users be entering records with wifi-enabled tablets, signatures can be captured directly on the tablet using one's finger or a stylus. Alternatively, signature pads can be purchased and used on your laptop or desktop computers.



# Signature Pads and ID Scanning

Should you wish to make use of SIMON Web Forms' Signature Pad and ID Scanning capabilities, this section will outline the current compatible hardware. For any additional questions or potential updates to the hardware section, call Parklane or email: [support@parklanesys.com](mailto:support@parklanesys.com).

## Purchasing Equipment

Depending upon the equipment you choose to utilize, we have provided a list of products that are compatible with your new system.

## Signature Pads

Topaz Systems has two models of signature pads: SignatureGem™ and SigLite™. For more information on their individual features, visit: <http://www.topazsystems.com/>

The signature pad is available in different sizes and can be ordered with or without an LCD screen. These signature pads operate over USB HID.

### 1x5 Signature Pads

SigLite™ 1x5 (No LCD) T-S261-HSB-R

SigLite™ 1x5 (LCD) T-S460-HSB-R

SigLite™ 1x5 (LCD Backlit) T-LBK460-HSB-R



### Rugged 1x5 Signature Pads

SigGem™ 1x5 (LCD) T-L462-HSB-R

SigGem™ 1x5 (LCD w. Backlit) T-LBK462-HSB-R



### 4x3 Signature Pads

SigLite™ 4x3 (LCD) T-LBK750-BHSB-R

SigGem™ 4x3 (LCD) T-LBK755SE-BHSB-R



## Larger Signature Pads

There are a number of larger USB signature pads available as well – see <http://www.topazsystems.com> for a complete list.

## Card Swipe

We are currently configured to the MagTek SureSwipe™ and MagTek Mini™ Card Readers. It is recommended the model supports 3-track scanning. We use the Devices through a USB Keyboard interface as it doesn't require any additional drivers or browser configuration to operate. The SureSwipe™ allows the card to be swiped facing either direction, whereas the Mini has a smaller desktop footprint. For more information visit: <http://www.magtek.com/>

The recommended Part Numbers are:

Magtek Mini™: 21040108

Magtek SureSwipe™: 21040145

## Proximity Card Readers

Parklane is programmed to use the *RFideas pcProx Enroll™* readers for proximity cards. Like the card swipe, these devices also operate natively through USB Keyboard emulation, so no special configuration or drivers are required.

Match up the *RFideas pcProx Enroll™* reader with your access control hardware – as seen in the Part Numbers section in the below link.

For more information visit:

[http://www.rfideas.com/products/pcprox\\_readers/pcprox\\_enroll/](http://www.rfideas.com/products/pcprox_readers/pcprox_enroll/)



## Installing Signature Pads

Once you purchase your signature pad, ensure you have installed all up to date drivers on the computers you will be using. Follow all other manufacturer's directions.

When the drivers are installed and the signature pad has been plugged in, SIMON Web Forms will automatically recognize the pad and you will be able to capture signatures.

Note: You must indicate on your template that it requires a signature in order for SIMON to capture.

## Installing Proximity/Swipe Scanners

Once you have purchased your scanner, follow the manufacturer's instructions for installation.

In order to retrieve data from your Personal Data Module in your Parklane System, you must first import into Parklane your badge IDs with corresponding personal IDs (i.e. employee ID or SIN).

For instructions on this import:

**GoTo > Personal Data > Options > Import Badge or Card Numbers > View Record Definition**

Once complete, ensure you set your **Default Search Method** to **Scan ID Badge**

# Reports Available in SIMON

## Reports

A37	Form-Vaccination Utilization
A3J	Form-Immunization Rates
A3K	Form-F/U Immunization Summary
A3M	PDF-Compliance by Protocol
A3N	PDF-Compliance Stats
A39	Compliance Report
A24	Details by Program
A31	Adverse Effect
A33	Employee Protocol Override
A36	Program Profile
A3B	Protocol Lot No.
A3C	Alphabetical by Protocol
A3D	Detail Listing Report
A3E	Potential Duplicate Non-staff
A3F	Missing Field
A3G	Employee Profile
A3H	Protocol by Date Given
A3L	Protocol Given By
A8A	Security Badge Details
A3P	Webform Import
A3R	Multiple Protocol Given
A3U	Alphabetical by Date Entered

## Excel Graphs

AHA	Program Status
AHB	Facility Statistics
AHC	Departmental Statistics
AHD	Hazard Statistics

## Exports

A23	SIMON Given Summary
A25	Non-Staff Demographic
A26	SIMON Given Details
A28	Export of Imported SIMON WebForms
AHF	Multistage

## Options

AX4	Report of Imported SIMON WebForms
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**See Parklane Resource Page for full report descriptions. To access, click “Help” from the main menu.**

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**PARKLANE SYSTEMS**  
**10-521 Nottingham Road**  
**London, ON N6K 4L4**  
**Canada**  
**519.657.3386**  
**ContactUs@parklanesys.com**

*Access the Parklane web site for more details about Parklane products*

**[www.parklanesys.com](http://www.parklanesys.com)**

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