



ONTASK ✓



Prepare for the
Unexpected
with Automated
Vaccine Health
Tracking

(813) 513-2774 | info@ontask.io | ontask.io



Introduction

The COVID-19 pandemic has inflicted an unprecedented level of disruption upon the business world. Organizations from almost every industry have been forced to rethink the way they manage their workforce, coordinate their supply chains, and connect with their customers. Companies spent much of 2020 scrambling to put the technology and health protocols in place to support safe remote and hybrid work environments.

Although there was some hope that life would return to normal after multiple vaccines became available in early 2021, the emergence of new COVID variants and shifting government health requirements have created a highly uncertain business landscape. Some states and municipalities have taken an aggressive stance on vaccinations, mandating that government employees and essential healthcare workers receive them while encouraging employers to put their own mandates in place. Other states, however, have taken the opposite approach, passing laws that prohibit private companies from requiring employees to be vaccinated unless multiple exemptions are offered.

This unsettled environment creates unique challenges for organizations. Companies need to be prepared to adapt quickly to changing circumstances. Flexibility is poised to be an essential business advantage for the foreseeable future, allowing organizations with the right technology and processes in place for managing health risks to quickly comply with new requirements and keep a step ahead of their competitors.





COVID-19 Vaccination and Testing Guidelines in Flux

From the very beginning of the pandemic, companies have faced a wide array of health guidelines from local, state, and federal authorities. This continues to be the case after the vaccine rollout. Organizations have had to devote a great deal of time and attention to monitoring changing policies to ensure they're in compliance and doing everything they can to protect customers and employees.

The federal government attempted to establish a uniform standard by taking two major steps following the Food and Drug Administration's (FDA) official approval of Pfizer's COVID vaccine in August 2021. First, a Presidential Executive Order established a vaccination mandate for all federal employees of the Executive Branch and federal contractors. Second, the Occupational Safety and Health Administration (OSHA) attempted to issue an emergency temporary standard (ETS) mandating vaccinations for private employers with more than 100 employees, however, this mandate was not ultimately passed by the Federal court system. Still, federal entities and contractors are required to have a vaccine tracking plan in place. Vaccine mandates are still possible at the state and local level, and a number of states and cities across the U.S. are or are considering mandating private employers to track and report company vaccinations.

New York City, for instance, has implemented a strict mandate requiring vaccinations for patrons of indoor dining, entertainment venues, and fitness centers; and for all private employees as well. All those reporting for in-person work or who interact with the public for business purposes in New York City are required to show proof that they have received at least one dose of the COVID-19 vaccine before returning to work. While the policy was designed to persuade individuals to get vaccinated, it had a profound impact on universities, which suddenly needed to be able to track and verify vaccination status for students, employees, and visitors using those services.

In addition, many large companies are choosing to implement vaccine policies within their workplace to reduce health risks for both employees and customers alike. As new variants continue to emerge, the best defense against a company outbreak is having a plan to track vaccine status as well as test result status.

Apart from legal requirements, there's also a public relations aspect to consider. As organizations continue to reopen and conduct more public-facing events, the last thing they want to deal with is being connected to a "super-spreader" event that not only endangers the lives of their employees, partners, and customers; but also exposes critical gaps in their health and safety policies to media scrutiny.

One way to navigate the shifting landscape of COVID vaccination and testing guidelines is to implement a COVID vaccine card tracking solution with the flexibility to adapt to changing requirements. A good COVID vaccination card tracker enhances visibility, limits liability, and streamlines health protocols so organizations can spend less time worrying about complicated procedures and more time focusing on their core business.





5 Things to Know About Health Tracking

There are many ways to track vaccination cards, exemptions, and test results, but every effective health tracking regime shares a few common elements. When creating a policy or implementing a new solution, asking these essential questions will ensure the health tracking regime has everything it needs to be successful.

PART 1

What information needs to be gathered?

Collecting data is the backbone of any kind of health tracking process. For vaccination and COVID testing, the main information to be gathered is typically found in one of three documents:



Proof of
vaccination card



PCR or antigen COVID
test results conducted
by a third party



Appropriate documentation for
medical or religious exemption

Many people assume that vaccination and testing documents are protected under HIPAA because they contain health information, making it illegal for anyone to ask them for proof of vaccination. However, HIPAA restrictions apply only to “Covered Entities,” such as healthcare providers, that store, use, and maintain patient health records. They cannot share that information without the individual’s consent. Most employers do not fall under this category and are not considered HIPAA-covered entities.

So, while it would be a HIPAA violation for a healthcare provider to share someone’s vaccination status with an employer, the same would not apply to that person sharing the information on their own. Also, in both cases, the employer is the one asking for information, not sharing it, so the request itself would not constitute a HIPAA violation. It’s worth noting that requesting and keeping a record of someone’s health status could potentially violate laws other than HIPAA.

PART 2

How is information shared and confirmed?

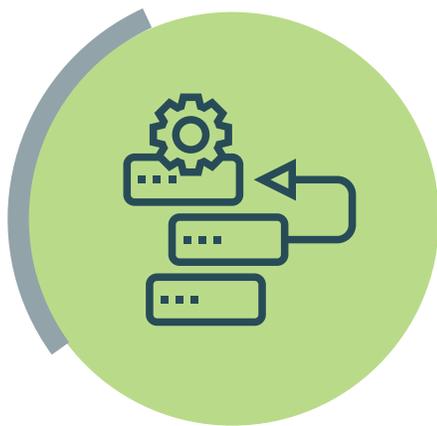
After determining what information needs to be collected, a vaccine health tracking solution must have a process in place that allows people to share it. For manual processes, an employee may be asked to provide their information in person or send a photo as an email attachment. More sophisticated solutions use online portals accessed through easily shareable links, which typically connect to a robust workflow solution that automates the tracking process.

Once the information has been shared, it still needs to be confirmed to ensure its accuracy and integrity. This is usually accomplished with a physical or digital signature that indicates the submitted information is accurate and truthful to the best of the person's knowledge.



PART 3

How is information stored?



Although vaccine and testing information shared with employers is not typically HIPAA protected, it is still classified as health information and should not be handled or stored carelessly. Collecting and storing physical vaccination cards poses a myriad of challenges, ranging from the loss or destruction of the cards themselves to questions about who has access to them. This same challenge applies to digital information, which might be sent as files attached to an email that can be easily misplaced or mislabeled.

Automated health tracking solutions ensure that information gets routed to the correct location after it's uploaded. Once in the system, it can be easily located and referenced when needed. Information can also be kept up to date or incorporated into a dynamic workflow that eliminates time wasted sifting through folder after folder of digital records.

PART 4

How is information secured?

The evolving legal situations involving vaccination and testing status understandably have many organizations worried about keeping health information secure and confidential. Apart from the obvious problem of a data breach that exposes health information, there are several important confidentiality and HR issues that could result from improperly secured vaccination and testing records.

For instance, any disciplinary or adverse actions that could potentially be tied back to information provided for health tracking purposes may be subject to legal action. Employers may be able to ask for information about vaccination status, but they cannot terminate someone who has a previously undisclosed medical condition that qualifies for exemption. In some cases, simply asking follow-up questions pertaining to vaccination or testing status might result in the violation of anti-discrimination laws. By keeping submitted information secure and segmented from other business functions, a health tracking process can protect an organization from unpleasant legal issues.

PART 5

How is health status tracked?

Once information has been gathered, stored, and secured, it still needs to be put into action as part of a health tracking solution. Fundamentally, the goal is to identify which employees have complied with the organization's established health policies. This could be something as simple as a spreadsheet that indicates the employee's status or as complex as an automated system that delivers compliance notifications directly to everyone who needs to know.

A more robust COVID vaccination tracker can be further integrated with other business solutions to confirm the status and keep records updated. Whoever is managing the system should be able to quickly access tracking data to determine who has submitted their vaccine or testing status and who still needs to provide information.

5 THINGS TO KNOW ABOUT HEALTH TRACKING



1. What information needs to be gathered?
2. How is information shared and confirmed?
3. How is information stored?
4. How is information secured?
5. How is health status tracked?



The Problems with Manual Health Tracking Processes

Unfortunately, many organizations attempt to use a variety of existing tools and processes to meet their vaccine tracking needs rather than turning to automated workflow software. Managing vaccination records, exemptions, and ongoing test results might not sound like a major undertaking, but it can quickly become overwhelming and lead to several problems.



Spreadsheets aren't scalable

Spreadsheets are often the first tool businesses reach for when they need to keep track of information of any kind. Unfortunately, they're not an ideal solution for health tracking, especially for organizations with more than a handful of employees. A spreadsheet not only requires a lot of manual upkeep but is also highly prone to human error. All it takes is one incorrect cell entry or a sorting mistake to throw off the dataset. There are also major security issues with spreadsheets given that they are frequently easy to access, edit, and download.



Emails are inefficient

Manual vaccine health tracking processes usually rely on traditional email to gather vaccination info, requiring whoever is being tracked to upload their documentation as an attachment. From a pure process standpoint, this approach is both inefficient and confusing. Emails can go overlooked, attachments can be lost in transition, and messages can be sent to the wrong recipient. Even if everything goes well, there's still the issue of having to manually retrieve information from an email and then update a list somewhere else, usually in a spreadsheet. There are ample opportunities for mistakes to be made with this approach.

The Problems with Manual Health Tracking Processes

HR liability is increased

Another major COVID protocol challenge that relates to manual health tracking is the fact that one or more people are directly handling a lot of private health information. As mentioned previously, this could potentially expose organizations to significant HR liabilities. Given the rapidly evolving legal standards related to vaccinations and COVID testing, there's also a chance that the protected status of vaccine-related information could be changed, creating serious complications for any company relying upon manual tracking.

Inefficiencies and confusion abound

It's often difficult to even gather the necessary health information in the first place. People may not know where to email their documentation or how to confirm its accuracy, which often requires logging into a separate system. Then there's the time it takes for someone to retrieve the information from their email (provided they didn't miss it), save it somewhere secure, and update whatever document or system is being used for tracking. The process simply isn't scalable for large organizations, which may have hundreds or even thousands of employees who need to be tracked.

PROBLEMS WITH MANUAL HEALTH TRACKING



Human Error



Poor Security



Confusion



Not Scalable



Inefficiency



The Benefits of Workflow Automation Powered Vaccination Trackers

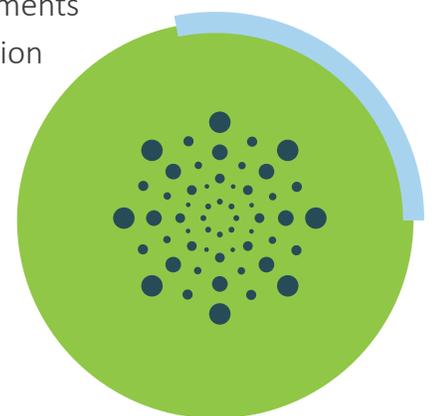


Given the numerous challenges associated with manual health tracking, many organizations have opted to implement an automated workflow solution that allows them to collect vaccination, exemption, and testing information much more efficiently and securely. This approach significantly reduces the risks associated with human error and provides a level of flexibility that manual approaches frequently lack.

Zero reliance on external tools

The big advantage of an automated vaccine card tracker is that it can handle every aspect of the tracking process without having to rely on any external tools. Web-based tracking solutions can be accessed via a hyperlink or QR code that takes visitors to a portal where they can provide information and upload any required documents securely. After that information is entered, the system routes documentation to the proper parties for review before automatically uploading it to the proper storage location and updating its tracking data to reflect the new information. There's no need for anyone to handle uploaded files or manually enter data into a separate system.

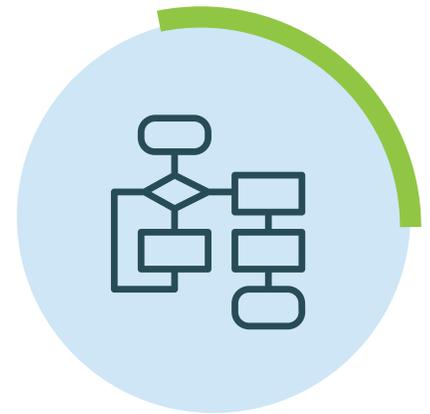
Once the workflow's conditional logic is set up and initial contact information is uploaded into the database, gathering health information is easy. The logic can be as simple or as complex as needed, which allows organizations to quickly adapt to changing circumstances. If the workflow is already set up to collect information on initial vaccine doses, for instance, a new step can be added for doing the same with booster shots. Reminders can be put in place to encourage people to submit materials, and integrated eSignature features allow them to certify that those materials are both true and accurate without having to use a separate authentication service.



Easy integrations and workflows

Another big advantage of automated tracking is that it can be integrated with other business systems to support health protocols and requirements. For example, after vaccination records, exemptions, or test results are uploaded and processed, the workflow can push data into another system to issue credentials or passes. This is particularly useful for organizations that need to quickly verify vaccination or testing status without having to log into a database.

The flexibility of automated health tracking workflows allows them to be used in multiple contexts. Gathering information on volunteers or visitors can follow the same basic process as tracking vaccination status for employees. Workflows can be easily copied and repurposed to create a scalable health tracking regime capable of handling multiple use cases on short notice. Since the collection and storage of information is both standardized and centralized, it's easy to quickly get visibility into the current health status of an organization, even if multiple departments are tracking different groups of people all at the same time.



Confidentiality is key

Finally, the fact that health information is managed automatically and entirely within a software solution means that the entire process can be easily outsourced to create yet another layer of confidentiality. Documentation is uploaded directly into the system rather than sitting in someone's email inbox or (even worse) on their desk, so it's possible to collect vaccination data on an entire organization without having to communicate directly with employees or asking uncomfortable questions that could lead to HR violations. A trusted partner could easily use one of these platforms to manage health tracking on behalf of a client who doesn't want to worry about keeping pace with the latest changes in vaccination requirements.



BENEFITS OF AUTOMATED HEALTH TRACKING



- Adaptability
- Fewer errors
- Visibility
- Security & confidentiality
- Scalability



Maintaining Flexibility for the Future

Speaking of those changes, organizations may not know what's around the corner, but if they've learned one thing from the COVID-era, it's that they need to be ready for them. New COVID variants have already impacted vaccination strategies, raising questions about whether booster shots should be made a requirement for states and companies tracking this data.

The omicron variant, for example, has changed what we know about symptoms and how easily the disease is able to spread among groups of people. This highly contagious variant has created a strong push by healthcare officials for already vaccinated parties to receive their booster shots. And, questions have arisen around the need for new variations of vaccines to combat newly mutated and emerging variants that are likely to come.

Keeping abreast of these new developments and who is requiring vaccine tracking at the state level is imperative to the health and safety of employees, as well as necessary to stay in compliance for businesses residing in states with tracking mandates.

For this reason, having a flexible, scalable solution in place for managing vaccine health tracking is the best way to prepare for these uncertainties. The conditional logic of automated workflows can be adjusted in moments to instantly adapt an existing vaccination regime to new developments and pressures. Rather than starting over from scratch every time something changes and forcing people to continuously resubmit their information, automated tracking allows organizations to build a sustainable framework that can be continuously optimized for better efficiency and efficacy.

Implementing Automated Health Tracking

Once an organization makes the decision to implement a vaccine health tracking system, however, they may face several potential challenges when it comes to implementing that solution. Workflow automation software frequently brings a sizable IT footprint with it, requiring businesses to be able to install and manage the platform on their own on-premises infrastructure. They can also be quite complex in terms of architecture and need customized coding to be implemented properly.

Implementing Automated Health Tracking (continued)

This might be viable for large enterprises or universities with substantial IT resources, but many organizations simply don't have the equipment or personnel to deploy and manage those solutions. Outsourcing offers a viable alternative, but not without its own challenges. Specialized health tracking providers frequently take a long time to implement their platforms, both due to excessive demand and overly complex software. Many of these providers offer robust solutions that were engineered to do much more than health tracking for COVID vaccinations.

By the time customers finally get through the lengthy deployment and training process, they're often left paying for a lot of features they will never end up using. Even worse, they may need specialized expertise or ongoing support to make basic changes to workflows, which prevents non-IT departments from managing health tracking on their own.

Mobile-based solutions are a more attractive alternative, but they require anyone submitting information to download an app in order to use them. This may not seem like a big issue in today's mobile-first world, but it creates a major obstacle in the information gathering process. People may forget which app they're supposed to download, or they might be unwilling to register for an account to use it. There's also the issue of people who don't own a mobile device. All of these challenges combine to slow down health tracking.

Web applications that run natively in a browser and are hosted on cloud infrastructure offer an ideal solution for organizations that need to implement vaccine health tracking quickly and cost-effectively. Since the workflows run entirely within the web browser, there's no need to download any software or deal with any complicated configurations. Everything can be set up and ready to go in a matter of days, which is ideal for organizations that need a solution in place right away.

As a cloud-based service, these solutions base their costs on usage. That means customers who are only interested in setting up workflows for health tracking won't wind up paying for other features and tools they don't need. Infrastructure and application architecture is managed on the provider's end, which frees up customers to focus on actually using the solution rather than struggling to maintain it. Web-based applications are incredibly easy to access, since anyone with an internet connection and a hyperlink or QR code can connect to the workflow they need on any device, regardless of operating system or hardware specifications.

OnTask Health Tracking: An Award-Winning Solution for Your COVID Vaccine Protocols



OnTask is a workflow automation solution that can be used to create, collect, track, and verify digital documents and forms. As a no-code, web-based application with a mobile-friendly interface and eSignature support, it proves to be an ideal platform for organizations looking for an easy way to track the vaccination status of employees, volunteers, and students.

Featuring a variety of pre-built templates that make it easy to set up and deploy workflows, OnTask Vaccine & Health Tracking users can use conditional business logic to account for their unique vaccination requirements, including exemptions, booster shots, and ongoing test results; no matter who tracking covid at the states or company level. Documents can be uploaded through web portals that can be accessed from any device. Integrated eSignature capabilities eliminate the need for paperwork and external signature programs, allowing people to certify their information quickly and easily.

OnTask's Vaccination & Health Tracking also provides extensive reporting features to help organizations gain complete visibility into how many employees have been vaccinated, how many still need to submit information, and how many require further attention. Test results and other documents can be routed to the proper people for prompt review without requiring anyone to send an email or manually update a spreadsheet.

Featuring outstanding support and an intuitive user interface, OnTask Vaccine & Health Tracking is a flexible solution that can be easily adapted to meet rapidly shifting vaccination requirements. The web-based solution is fully HIPAA, SOC2, and FERPA compliant and is backed by an experienced support team that can help organizations set up the customized workflows they need to keep their COVID protocols streamlined and efficient.

- ✓ HIPAA
- ✓ SOC2
- ✓ FERPA Compliant



Prepare for the Unexpected with Automated Vaccine Health Tracking

To learn more about how OnTask Vaccine & Health Tracking can help you ensure the health of your workplace, talk to one of our workflow automation experts today.



OnTask Vaccine & Health Tracking Features

SCHEDULE A DEMO

- Pre-built templates
- Conditional business logic
- Secure document storage
- Built-in reminders
- No coding or installations needed
- Binding eSignatures
- Accessible from any device

Simplify Your COVID-19 Protocol