

## Guide to Configuring the VxRM Application

The DataMotion VxRM platform contains an easy-to-use, mobile-friendly web application that allows employees to securely document their COVID-19 vaccination status, as well as provide proof of vaccination and COVID-19 test results.

The VxRM Admin portal will allow employers to configure the VxRM employee app, as well as search and sort through employee responses. You can utilize this application online or from your phone with the following browsers: Chrome, Safari, Firefox, Edge.

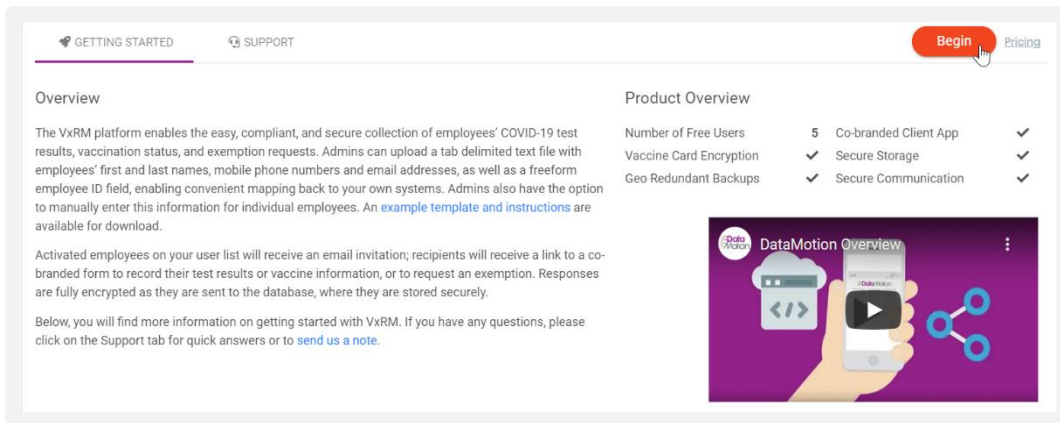
The below instructions will walk through how to find and utilize the VxRM Admin portal.

### Getting Started

To get started with the VxRM platform, navigate to the [datamotion.com/portal/product/VxRM](https://datamotion.com/portal/product/VxRM).

This link will bring you to the DataMotion self-service page, where you will find an overview of the VxRM platform, as well as answers to frequently asked questions.

In the top right corner of the page, you will see an orange “Begin” option. Select this option to get started.



Once selected, there are three configuration steps to complete:

- Company set up
- Configure the Employee List
- Enable the VxRM app

Below will guide you through each step.

### **Configuration Step 1: Company Set Up**

Your company name will be captured when you register your DataMotion account. Therefore, this information will be auto populated by default.

You can add additional customizations on the “Company Settings” tab.

## Company Settings

Once you select the “Company Settings” tab, you will see various options to update your company information and change the user interface of the employee application.

To the left of the screen, you will see a display of the employee app, which will render your changes when you select the purple “Save” button, located on the left.

The employee app can be updated with the following fields:

- **Testing Cycle:** At the top of the “Company Settings” tab there is the option to set your accepted testing cycle or how often you will require employees to be tested. Select the space to the left of “days” and enter the number of days your testing cycle will consist of.
- **Testing Grace Period:** Next to “Testing Cycle” is the option to set your testing grace period or the number of days that may pass after a testing cycle before the employee is considered not compliant. Select the space to the left of “days” and enter the number of days your testing grace period will consist of.
- **Company Name:** To change the name of your company, enter a new name in the “Company Name” text field, below “Testing Cycle”. This will be the name that is displayed on the employee application.
- **Primary and Secondary Colors:** To change the colors of banners, buttons, and other elements in the application, select the primary and secondary color boxes, located below the “Company Name” textbox.

Once selected, a widget will appear with a rainbow color palette displayed in the middle. You can choose a color with this palette. Above the palette, you will see a larger section containing different shades of the color you selected. You can decide how dark or light you would like this color, depending on where you click in this section.

You also have the option to enter in your desired color’s hex triplet with the text box at the bottom of the widget.

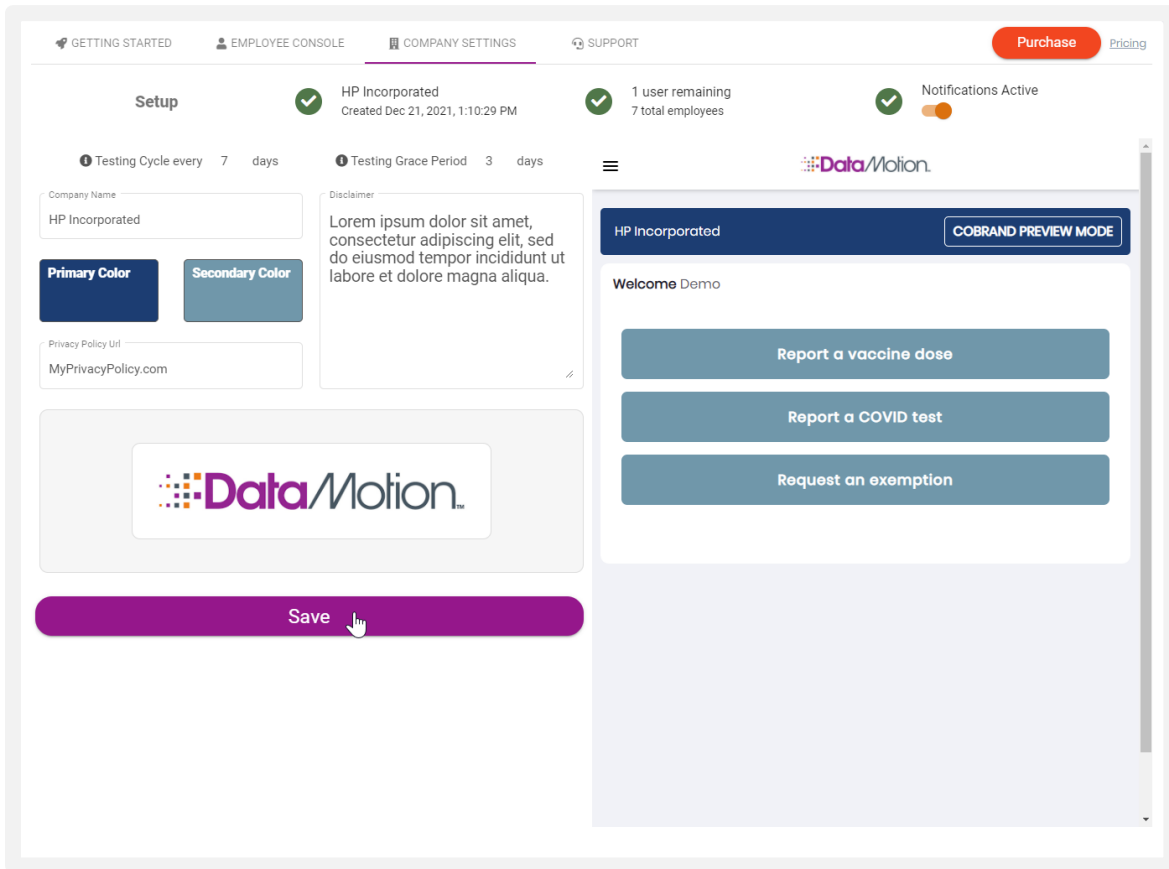
- **Privacy Policy Url:** In the Privacy Policy Url textbox, you can provide a link to your company’s privacy policy, which will be available for employees to access.

*Note: This can be viewed on the preview section by selecting the three-line hamburger icon in the top left corner of the section. If no privacy policy URL is provided, this option will be left off the screen.*

- **Logo:** At the bottom of the section, you will see the option to upload your company logo. You can select this option to open file explorer, or you can drag and drop the logo here.
- **Disclaimer:** To the right of the page, you will see the “Disclaimer” text field. Here, you can provide a disclaimer for your employees to read on the VxRM application.

*Note: This can also be view on the preview section by selecting the three-line hamburger icon in the top left corner of the section. If no disclaimer is provided, this option will be left off the screen.*

Once you have configured the co-brand, select “Save” to ensure your customizations will go into effect once you activate your site.



Congratulations, you have successfully co-branded the VxRM application!

## **Configuration Step 2: Configure the Employees List**

Once your company settings are configured, return to the “Employee Console” tab.

Within this tab, you can add a list of individual employees’ names who will be required to submit their vaccination status, test results and exemption requests. As an admin, you have the ability load employee (user) names manually, or by uploading a bulk list, such as a department or the full company. Below, we will walk through how to perform each method.

*Note: To add users with a different domain than the email address used during registration or users with domains of public email providers, please contact [the DataMotion sales team](#). By default, these users will not be allowed.*

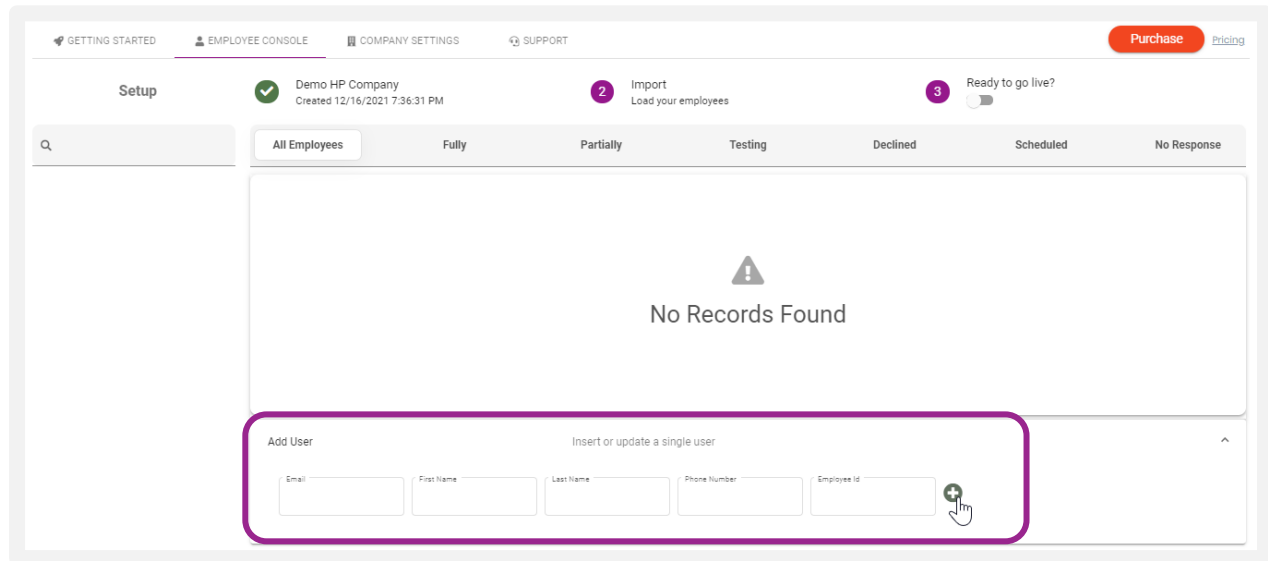
### **Add an Individual**

You can add one user at a time by filling out the details requested below the employee list. If you have not entered any users yet, this section will read “No Records Found”. To expand this area and display the text fields needed to enter the user’s information, click the “Insert or update a single user” section.

To start loading users, enter the following information into the specified text fields:

- Email: Enter the email address to which the VxRM application link will be sent.
- First Name: Provide the employee's first name.
- Last Name: Enter the employee's last name.
- Phone Number: Include the employee's phone number in this section.
- Employee ID: If applicable, enter the employee's company-issued ID number.

Once this information is entered, select the + button at the end of the section to add the user to the employee list.



## Bulk Upload

There is also an option to bulk upload employees, located below the individual upload section. This option allows you to upload an Excel sheet with a list of employee names and information. In the top left corner of this section, you will see a "Download Template" option. Select this option to get started.

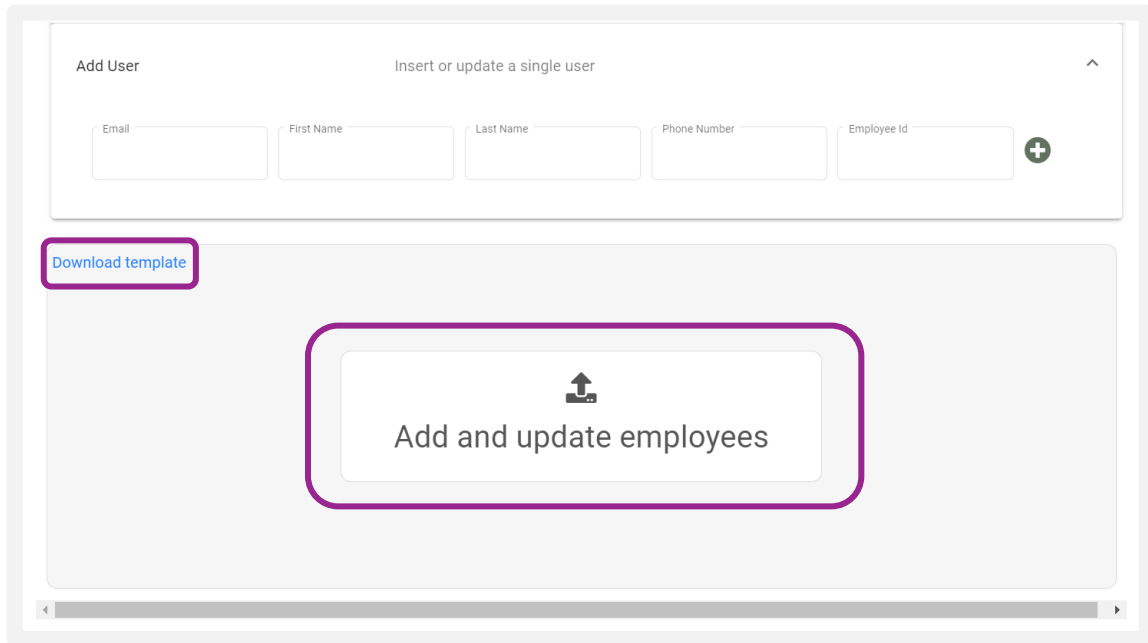
After selecting this option, a zip file will be downloaded. In this zip file, you will see an Excel document with five columns. Enter the following information under the corresponding column name for each employee:

- Email: Enter the email address which the VxRM application link will be sent to.
- First Name: Provide the employee's first name.
- Last Name: Enter the employee's last name.
- Phone Number: Include the employee's phone number in this section.
- Employee ID: If applicable, enter the employee's company-issued ID number.

Within the zip file, you will also find a Word document containing instructions on how to fill out the Excel sheet.

Once the Excel sheet is filled out, upload this document by selecting anywhere in the bulk upload section to utilize the file explorer. Or you can drag and drop the document to the bulk import section as well.

Once the file explorer is displayed, you will need to navigate to this completed Excel sheet and click open.



Congratulations, you have successfully uploaded your list of employees! If you notice some of them are deactivated, don't worry. We will cover why in the next section.

### Licensing Details

By default, you will receive five free licenses which will allow you to test the VxRM application.

If you upload more than five users to the employee list, you will see that the sixth user (and so forth) may be grayed out with a line through the text. This is because you have added more users than you have licenses, and these users will therefore be deactivated.

### Activate/Deactivate Users

To change a user's status, look the right of each employee row. By selecting the vertical ellipsis button, will see an option to activate or deactivate this user.

Select this option to change the user's status. Once selected, a pop up will appear asking you to confirm if you would like to activate or deactivate a user.

*Note: Only those employees whose accounts are activated will receive an email once you finish the process by enabling the app, which we will cover next.*

All Employees		Compliant		Not Compliant	
<input type="checkbox"/>	Email Address	First Name	Last Name	Phone Number	Action
<input type="checkbox"/>	Test1@datamotion.com	Test	User1	1235555555	
<input type="checkbox"/>	Test2@datamotion.com	Test	User2	1235555555	
<input type="checkbox"/>	Test3@datamotion.com	Test	User3	1235555555	

### Purchase Additional Licenses:

To buy additional licenses, select the orange “Purchase” button at the top of the page, to the left of the “Employee Console” tab.

Doing so will display a pop up where you can purchase additional licenses. The first step requires you to enter your company address. Enter the address, city, state, and zip code of your company followed by “Next”.

The second purchasing step will require you to choose the number of licenses you wish to purchase within the “Users” section.

In this section you can add and remove users by selecting the + or – buttons to either side of the total number of licenses. Or you can drag the orange circle below to the left or right to add and subtract from your total number of licenses you wish to purchase.

To the left under “Annual Subscription” you can select the radio button if you wish to make this purchase an annual subscription. Leave this button unchecked if you would like to make this a one-time purchase.

From here, enter your credit card number, the expiration date, and the three-digit CVC number in the last section.

The screenshot displays the VxRM checkout interface. At the top, there is a logo with the text 'VxRM' and a progress indicator with three steps: '1 Customer Info', '2 Payment Info' (the current step), and '3 Checkout'. Below the progress indicator, there are two main sections. The left section, titled 'Annual Subscription', shows a 'Renewal Date' of 'Wednesday, December 21, 2022'. The right section, titled 'Users', features a slider set to '515' users, with a 'Cost' of '\$515.00 (\$1.00 per user)'. Below these sections, a credit card summary shows a 'VISA' card with the number '4242 4242 4242 4242', an expiration date of '05 / 24', and a CVC of '990 07860'. The billing information section includes fields for 'Cardholder's Name' (Heather P), 'Billing Address 1' (123 Test Drive), 'Billing Address 2' (empty), 'City' (Morristown), 'State' (New Jersey), and 'Zip Code' (07860). At the bottom, there are two buttons: a white 'Back' button and a red 'Finish' button with a hand cursor icon pointing to it.

Once this section is complete a new card holder section will appear. In this section add your name and billing address.

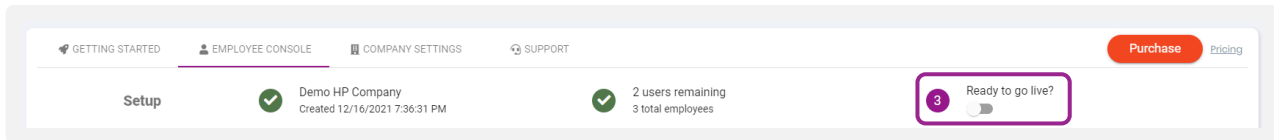
Once this information has been entered, to complete the purchasing process, select “Finish” at the bottom of the screen.

### **Step 3: Enable VxRM App**

Once you have filled in your company information, updated the co-brand (if desired) and added all of your employees to the employee list, you are ready to enable the VxRM application.

To get started on this, select the toggle button at the top of the page under “Ready to go live?” and next to the purple “3”.

This will allow you to enable the application and automatically send an email with a link to the VxRM application to each activated employee.



It's as easy as that! Your employees will now receive their VxRM application link and begin to upload their vaccination information, weekly test results and exemption requests.

If you would like to distribute instructions to your employees on how to fill out this application, click [here](#).

#### **Step 4: Review Results**

You have now enabled the VxRM application! Your employees will be able to start submitting responses and test results.

Below, we will review how to sort through the responses, get an at-a-glance overview, and search for specific information.

#### **How to Sort**

Once you begin to receive responses, it is easy to search and sort through this information. At the top of the employee list there are three tabs to choose from: All Employees, Compliant, Not Compliant.

Choosing the "All Employee" tab will allow you to view all employees within the employee list. You can select any employee to see their response.

Choosing the "Compliant" tab will show three additional options: All Employees, Fully and Testing

- The "All Employees" option will show all employees considered compliant.
- The "Fully" button will display a list of employees who have been fully vaccinated.
- The "Testing" button, will show the users who are submitting a weekly test result within the testing cycle, defined in the "Company Settings" tab, along with their test result information.

Choosing the "Not Compliant" tab will show four additional options: Partially, Testing and Declined

- The "All Employees" option will show all employees considered not compliant.
- The "Partially" button shows the users who have received at least one COVID-19 shot but are not considered fully vaccinated, as some vaccination regimens require more than one shot for the recipient to be considered fully vaccinated.
- After selecting the "Testing" option, you will find the users who have chosen to submit a weekly test result but have not submitting their results within the testing cycle, defined in the "Company Settings" tab.



- The “Declined” tab will display a list of users who do not wish to be vaccinated.

The screenshot shows the VxRM application interface. At the top, there are navigation links: GETTING STARTED, EMPLOYEE CONSOLE, COMPANY SETTINGS, and SUPPORT. A 'Purchase' button and 'Pricing' link are in the top right. The main header shows 'Setup' with a green checkmark, 'HP Incorporated' (Created Dec 21, 2021, 1:10:29 PM), '1 user remaining / 4 total employees', and 'Compliance Checked' (Dec 21, 2021, 1:16:02 PM).

On the left, a pie chart titled 'Vaccine Submissions - Declined: 1' shows a single blue segment for 'Declined'. A legend below the chart identifies: Partially (red), Fully (dark blue), Declined (light blue), and Testing (orange).

The main content area has a search bar and tabs for 'All Employees', 'Compliant', and 'Not Compliant'. The 'Testing' sub-tab is selected, showing a table with 4 employees:

Email Address	First Name	Last Name	Phone Number	Action
<input type="checkbox"/> Test1@datamotion.com	Test	User1	1235555555	⋮
<input type="checkbox"/> Test2@datamotion.com	Test	User2	1235555555	⋮
<input type="checkbox"/> Test3@datamotion.com	Test	User3	1235555555	⋮
<input type="checkbox"/> heatherp@datamotion.com	Heather	Post	1235555555	⋮

Below the table, it says 'Showing 4 Employees' and 'Add User' with a dropdown arrow.

### Quick Overview Chart

You can get an at-a-glance overview of each of these tabs with the pie chart, which is provided to the left of the employee list. This color-coded chart will reflect how many employees fall under each category. You may also hover over each segment of the chart for more information.

### Search

Above the pie chart, you will see a search bar. Here, you may enter key search terms, such as an employee’s first or last name.

By using search terms that you enter, the employee list will only display the entries related to your search.

### Conclusion:

Now you are all set to fill out the VxRM form and properly send your vaccination status. Be sure to check out our [Documentation and Getting Started page](#) for information on how to purchase and configure this application. For more information, contact our [sales team](#) or message us directly on our [website](#).

Follow us on [Twitter](#), [Facebook](#), and [LinkedIn](#) for additional VxRM application updates.