

# Using Ventiv Products to Track Pandemic Data

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# Introduction

This document demonstrates how you can use features in Digital, Claims Enterprise, and Ventiv Analytics to evaluate pandemic location safety and to manage employee examinations.


## Using Digital to Create Pandemic Surveys

Ventiv has designed a Location Assessment and Risk Tool using its Digital platform to allow for the capture and analysis of Pandemic risk for a specific location. Please contact your Ventiv representative for additional information on this toolset. This toolset is currently being offered at no cost for existing Ventiv clients.

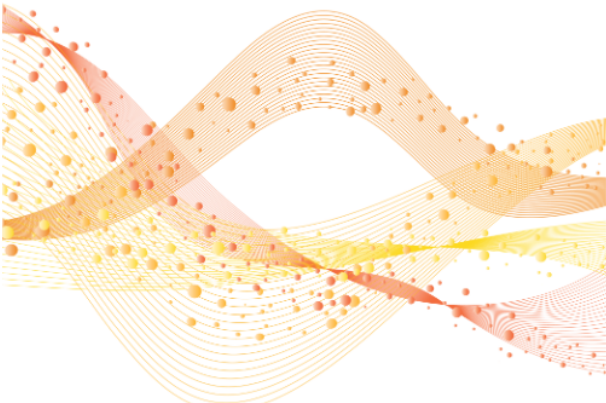
Through Digital, you can create a survey that prompts users to answer a series of pandemic-related questions.

SECTIONS ▾ Privacy Sections 1 of 7

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 **LOCATION ASSESSMENT SURVEY** Progress 1%  
INTRODUCTION

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Ventiv Technology appreciates the Covid-19 Pandemic has placed huge burdens on the global economy and many businesses have had to close offices and business locations; with employees working virtually from home offices. As governments and regional bodies, as their circumstances dictate, start to relax the lock-down regulations, businesses need to implement policies and controls to effectively manage their employee's return to work and allow the business to effectively operate in the post-pandemic normal.

This pandemic location assessment is designed to evaluate a location's readiness for return to work, including screening and testing practices, plus tracking employee screening and test results.


Expanded analytics overlay these results to give situational analysis for the area by location readiness assessment, pandemic risk exposure and vulnerability to the pandemic.


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[BACK TO MENU](#)

Example of Location Details survey page:

Please select Address of your Location





Type of Location

Status of Location

How many employees work at this location?

What would you like to report

Standard Location Assessment


Public Store Assessment

[BACK TO MENU](#)

Example of Location Assessment survey page:

SECTIONS ▾ Privacy Sections 3 of 7

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**ventiv**  **LOCATION ASSESSMENT SURVEY** Progress 1%  
STANDARD LOCATION ASSESSMENT

---

Is this Location still closed?

Yes

No

Is this location for employees only, or does the general public come inside this location?

Employees Only

Employees and General Public

Have all employees been socially distancing while this location has been closed

Yes

No

What group of employees are returning to location

All

Designated Critical Employees

Essential Employees

Crisis Team

Other

Do you have a method of communication for Covid-19 information to be passed to employees?

Yes

---


[BACK TO MENU](#) COMPLETE SECTION

After a user submits a survey, that information is uploaded into the Analytics platform, which generates a report that shows pandemic-related information for that location.

The following illustration shows an example of a page in the Pandemic Location Assessment Report.

## Pandemic Location Assessment

### Overall Location Assessment



| Score | Maximum | %   |
|-------|---------|-----|
| 32.5  | 65      | 50% |

Location is far below Expected Standards.  
Action required.

### Recommendations

| Ref | Priority | Topic               | Recommendation  |
|-----|----------|---------------------|---|
| 2   | High     | Building Controls   | Increase employee desk separation or install screens between desks.       |
| 4   | High     | Employee Screening  | Install temperature monitoring stations                                   |
| 1   | High     | Building Controls   | Install hand sanitizer stations in the lobby and lifts                    |
| 3   | High     | Employee Protection | Provide employees with face masks for use in office and whilst commuting. |

## Using Claims Enterprise to Track Pandemic Information

The primary modules in Claims Enterprise that can be used to track pandemic information are the Asset, Inspection, Recommendation, and Examination pages.

For example, you can use the Asset page to track a building asset and indicate whether the building is currently open or closed. You can add inspection records to that asset to track building inspections. From the inspection record, you can add recommendation records to track improvements that need to be made as a result of the inspection findings.

On the Examination page, you can enter information about COVID-19 testing and health screenings for employees.

## Configuring Pandemic-Specific Fields

Several of the Claims Enterprise pages depicted in the next sections were customized to capture pandemic-specific data. Your system administrator can make similar changes to meet your organization's needs for pandemic tracking and reporting. These changes are made through the Reference Table Maintenance module (System Administration > Reference Table Maintenance) and by configuring roles in Security Administration (System Administration > Security) to view those changes.

## Using the Asset, Inspection, and Recommendation Pages

This section describes how you can use the Asset, Inspection, and Recommendation pages to track location safety information. The following steps use an example of performing a building inspection prior to having employees return to the building.

From the Asset Search page, you can search for an existing asset or add a new asset by clicking the **Add** toolbar button. In either case, the system opens the record in the Asset page.

The following instructions describe how to add pandemic-specific information to an existing asset record.

1. From the home page, click the **Asset Search** tab. If the tab is not currently visible, click the **Tab** menu and navigate to it from the dropdown list.
2. Enter search criteria to locate the asset record, and then double-click the applicable record in the results grid. The Asset page opens with focus on the **Asset** tab.



- Click the **Building Type/Status** drop-down field and review the options. You can use this field to track the status of the building and indicate whether it is open or closed.

**Note:** This is an example of how your system administrator can adjust fields to capture pandemic-related information. In the following illustration of the Asset page, the label for the existing **Building Type** field was changed to **Building Type/Status**, and pandemic-specific options were added to the drop-down list. For more information on how to do this, see the [Customizing Pages through Reference Table Maintenance and Page Security](#) section.

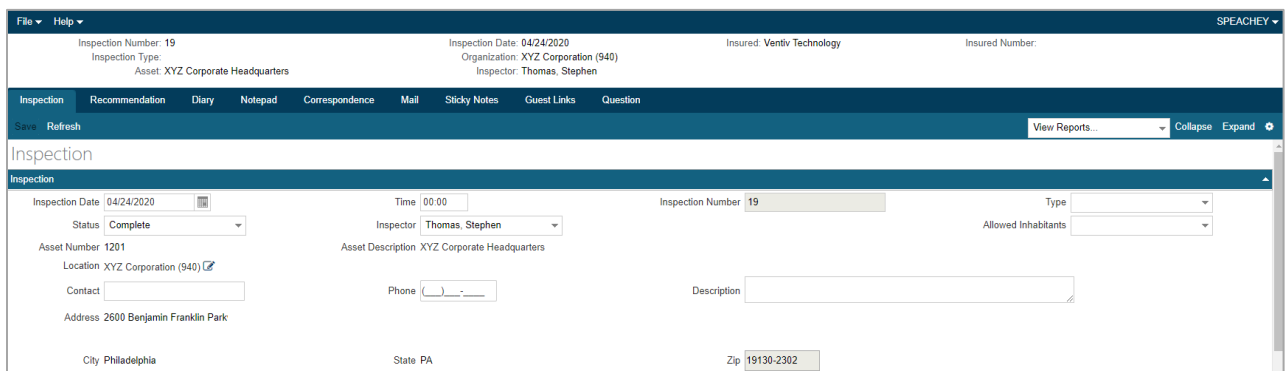
The screenshot displays the 'Asset' page for asset number 1201, 'XYZ Corporate Headquarters'. The 'Building Type/Status' dropdown menu is expanded, showing the following options: Closed Pandemic (selected), Closed Earthquake, Closed Fire, Closed Renovation, and Mixed use. Other visible fields include: Asset # 1201, Insured: Ventiv Technology, Asset Type: Building, Ownership: Corporation, Address: 2600 Benjamin Franklin Parkway, City: Philadelphia, State: Pennsylvania, Zip: 19130-2302, and various value fields (Building Value, Vehicle Value, etc.) all set to 0.00.

- Make any other changes or additions on the **Asset** tab as necessary, and then click **Save**.

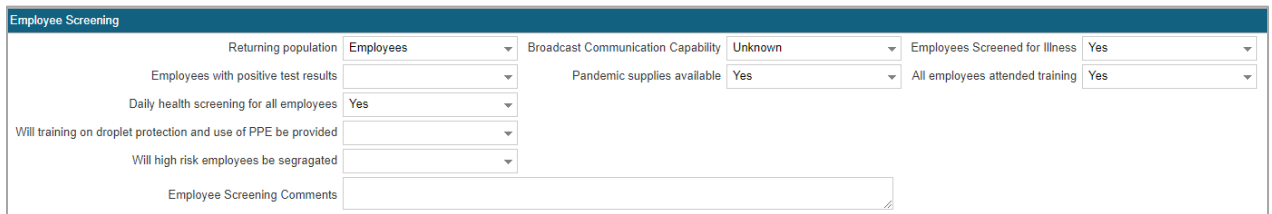
**Note:** To associate an organization with the asset, click the **Select Organization Structure** button beside the **Org Hierarchy** field. An Organization Structure dialog opens, where you search for and select an organization.

- Next, click the **Inspections** tab. You can use this tab to track information about site inspections.
- Click the **Add** toolbar button to add a new inspection record (such as a building inspection). The system opens a separate Inspection Detail page.
- Use the **Inspection** section to populate general details about the inspection, such as the inspection date, type, inspector, and so forth.

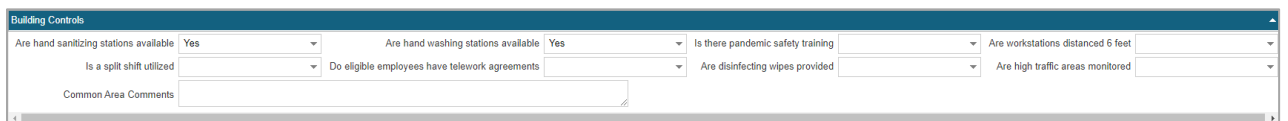
The following illustrations demonstrate how your system administrator can adjust sections and fields on the Inspection tab to capture pandemic-related information. In the following illustrations, the several of the section headers and fields were relabeled. For more information on how to do this, see the [Customizing Pages through Reference Table Maintenance and Page Security](#) section.



- Optionally, use a customized/relabeled **Employee Screening** section to enter information about employee health screenings, such as whether employees have been screened, whether they had positive test results, etc.



- Optionally, use a customized/relabeled **Building Controls** section to enter details about the building such as whether handwashing stations are available, whether there is adequate distance between workstations, etc.



- Optionally, use a customized/reabeled **Employee Protection** section to specify whether supplies are available for employee protection, such as gloves and masks.

**Employee Protection**

Disposable gloves
  Disposable masks

Employee Protection Comments

- Click **Save** to save the inspection record. The system closes the Inspection Detail page and takes you to the Inspection page for the record you just created. The Inspection page has its own set of tabs. The one most applicable to tracking pandemic information is the **Recommendation** tab.
- Click the **Recommendation** tab. You can use this tab to track repairs or improvements made in response to conditions observed during an inspection. This page has two sections. Use the **Recommendation** section to enter recommendations. Use the **Response** section to enter responses to the recommendations.

File Help SPEACHEY

Inspection Number: 19      Inspection Date: 04/24/2020      Insured: Ventiv Technology      Insured Number:
   
 Inspection Type:      Organization: XYZ Corporation (940)      Inspector: Thomas, Stephen
   
 Asset: XYZ Corporate Headquarters

Inspection    **Recommendation**    Diary    Notepad    Correspondence    Mail    Sticky Notes    Guest Links    Question

Add   Save   Refresh Download

### Recommendation

|                      |                  |             |  |
|----------------------|------------------|-------------|--|
| Recommendation #     | Rec. Date        | Status      |  |
| Recommendation Type  | Rec. Type Detail | Rec. Owner  |  |
| Location - General   | Risk Type        |             |  |
| Location Description | Priority         |             |  |
| Likelihood           | Consequence      | Risk Rating |  |
| Reported To          | Title            | Phone       |  |
| Comments             |                  |             |  |

### Response

|                 |                     |   |  |
|-----------------|---------------------|---|--|
| Response        | Response Date       | Est. Completion Date                    |  |
| Response        |                     |   |  |
| Compliance Date | Alternative Action  |   |  |
| Estimated Cost  | Est. Funding Source | <input type="checkbox"/> Capital Budget |  |
| Feedback        |                     |   |  |
| Status Desc     |                     |   |  |

| Related            | Recommendation # | Date | Type | Status | Owner |
|--------------------|------------------|------|------|--------|-------|
| No data to display |                  |      |      |        |       |

13. Click the **Add** button to add a new recommendation.
14. Populate the fields to describe the recommendation.

For example, you could add a recommendation to install hand sanitizer stations in the lobby. Later, when that recommendation has been implemented, you can update this record and use the **Response** section to enter a response for the recommendation, such as “Finished installing hand sanitizer stations.” When all recommendations have been implemented, you could also add a recommendation to re-open the building.

15. Click **Save**.
16. Add additional recommendations as necessary by clicking the **Add** button and saving each recommendation.

After the inspections have been performed and the recommendations have been implemented, you could then open the Asset record for the building and change the value in the **Building Type/Status** field to Open Active.

## Using the Examination Page to Track Testing

This section explains how to use the Examination page to enter and track information such as COVID testing and health screenings for employees.

1. From the Employee Search page, click the **Search Type** field and choose **Examination**.

| SSN | Last Name | First Name | Middle Name | Phone Number | Add User | Edit User |
|-----|-----------|------------|-------------|--------------|----------|-----------|
|-----|-----------|------------|-------------|--------------|----------|-----------|

2. Enter search criteria to locate the applicable employee, and then click **Search**.
3. From the results grid, double-click the applicable record. The system opens the Examination page.
4. Click the **Add** button to add a new examination.

- Populate the fields on the page with information about the test or screening.

The following illustration shows an example of this page populated with sample screening information.

| SSN       | Last Name | First Name | Examination Location | Examination Type | Examination Date | Test Result | Department      | Co |
|-----------|-----------|------------|----------------------|------------------|------------------|-------------|-----------------|----|
| 561548086 | Wilstach  | Anna       | COVID Testing Center | COVID Screen     | 04/20/2020 00:00 | Negative    | Human Resources | 04 |
| 561548086 | Wilstach  | Anna       | COVID Testing Center | COVID Test       | 04/24/2020 00:00 | Positive    | Human Resources | 04 |

**Note:** In release 5.4.5, you can access the Examination page directly from an employee’s record as long as your organization has already loaded employee data into the system. From the Employee Search page, select **Employee** as the **Search Type**. Enter at least one search criterion, click **Search**, double-click a record to open it in the Employee page, and then click the **Examination** tab. From this tab you can view existing examinations and add new ones.

## Customizing Pages through Reference Table Maintenance and Page Security

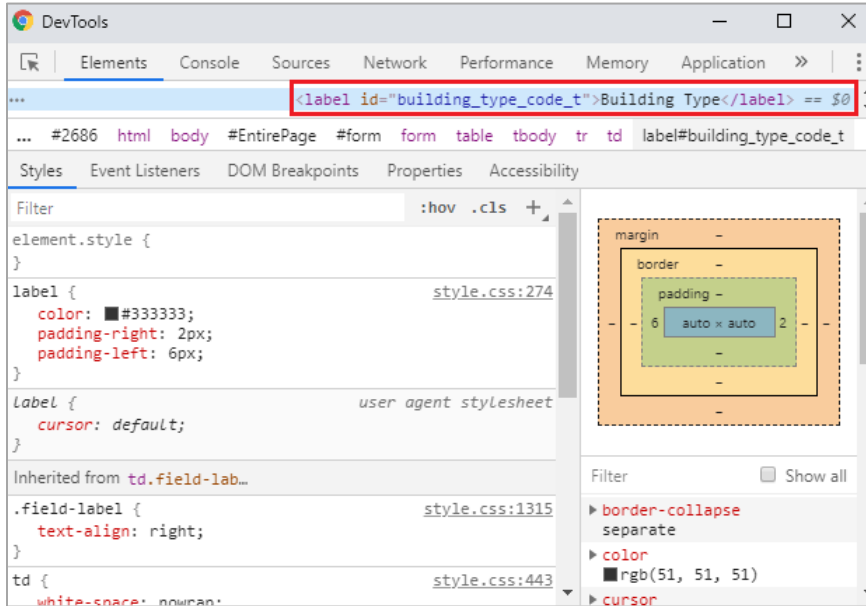
The existing Asset, Inspection, Recommendation, and Examination pages can be used to track pandemic-related information, such as location safety and employee examinations. Using existing functionality, your system administrator can create pandemic-specific labels and options for existing sections and fields on these pages. The following sections demonstrate how to relabel fields and sections and create pandemic-specific options in drop-down lists.

### Relabeling an Existing Field

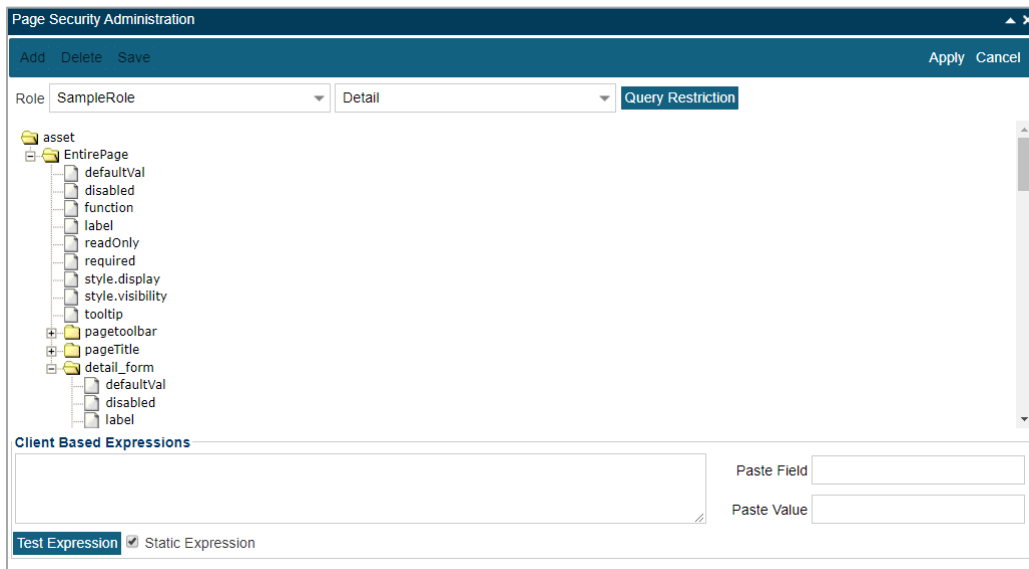
The following example shows how to relabel the **Building Type** field on the Asset page to **Building Type/Status**.

- Open the Asset Search page and perform a search for the applicable asset (e.g., a building asset).
- From the results grid, double-click the applicable building record to open it. The Asset page opens.

3. Locate the existing **Building Type** field, right-click your mouse on it, and then choose **Inspect** from the right-click menu. From this dialog, you can determine which table contains the **Building Type** field (**building\_type\_code** in this case). Make note of this table since it will be used in subsequent steps.



4. Close the dialog to return to the Asset page, and then click the **Page Configuration** button in the toolbar. The Page Security Administration dialog opens.



5. From the **Role** drop-down list, select the applicable role (i.e., the role that will be able to view the customized field label and options).
6. Leave the default option of **Detail** in the next drop-down field.

7. Under the **asset** folder, expand the **EntirePage** folder, then the **detail\_form** folder, and then the **building\_type\_code** folder.
8. Under the **building\_type\_code** folder, highlight the **label** attribute.
9. In the **Client Based Expression** field, enter the new label (e.g. **Building Type/Status**).



10. Click the **Test Expression** button to make sure the expression is valid. Make changes, if necessary.
11. Click **Apply** to apply your changes.

The next time a user with the assigned role opens the Asset page, the relabeled field appears. You can test this by assigning yourself to the applicable role, logging out and back in, and opening an asset record.

Asset Sticky Notes Related Claims Related Coverages Inspections Asset Plans

Save Refresh

Asset

\*Asset # 98675309 Identification # External Asset #

\*Insured Portland Scarbor Org Hierarchy

\*Asset Type Building \*Ownership LAND

\*Asset Desc Warehouse  Active Expiration Date

Address 1 31 Hannaford Dr

Address 2

City Scarborough State Maine Zip 04074-

County Country

Manufacturer Model Model Year

Search Criteria1 Search Criteria2

Building Value 0.00 Art Value 0.00 Equipment Value 0.00

Vehicle Value 0.00 Library Value 0.00 Total Value 0.00

Net Revenue 0.00 Adjusted Net Revenue 0.00 Lessor

Material for Sale 0.00 Historical Cost 0.00 Date Last Rated

Non Capital Equipment 0.00 Fixed Equipment # Rated Amount 0.00

Appraised Value 0.00 Appraisal Date Last Inspection Date

Year Constructed Year Acquired Year Occupied

**Building Type/Status** Construction Type Inspector Name

Square Footage 0 Assignable Square Footage 0 Occupancy 0

Functional Affiliation Funding Reference

## Adding Options to Drop-Down Fields

The preceding steps described how to change the label on an existing field to make it more suitable for tracking pandemic information. In those steps, we changed the label for the **Building Type** field to **Building Type/Status**. The following steps describe how to add pandemic-specific options to the field's drop-down list.

1. From the **System Administration** menu, choose **Reference Table Maintenance**. The Reference Table Maintenance dialog opens.
2. Locate and double-click the **building\_type** table. The Table Maintenance dialog for the building\_type table opens.
3. Click **Add**. The system adds a new row to the table.
4. In the new row, enter the new building type code and building type description. Type a 1 in the active column to make the information in the new row active.

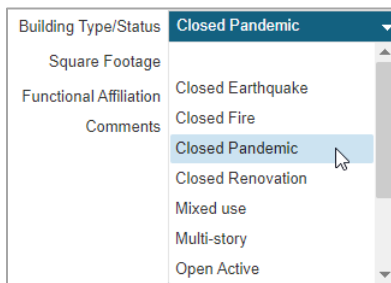
The following illustration shows an example where a pandemic-specific option of **Closed Pandemic** was added.



| building type code | building type desc  | external building type | active |
|--------------------|---------------------|------------------------|--------|
| 1                  | Open Active         |                        | 1      |
| 2                  | Multi-story         |                        | 1      |
| 3                  | Single story        |                        | 1      |
| 4                  | Mixed use           |                        | 1      |
| 5                  | Under Construction  |                        | 1      |
| 6                  | Closed Pandemic     |                        | 1      |
| 7                  | Closed Fire         |                        | 1      |
| 8                  | Closed Earthquake   |                        | 1      |
| 9                  | Closed Renovation   |                        | 1      |
| 10                 | Open Restricted Use |                        | 1      |

5. Click **Save** to save your changes, and then click **Clear Cache** to clear cached data and make the changes available to front-end users.

When users click the newly relabeled **Building Type/Status** field, the **Closed Pandemic** option will appear in the drop-down list.



## Relabeling an Existing Section

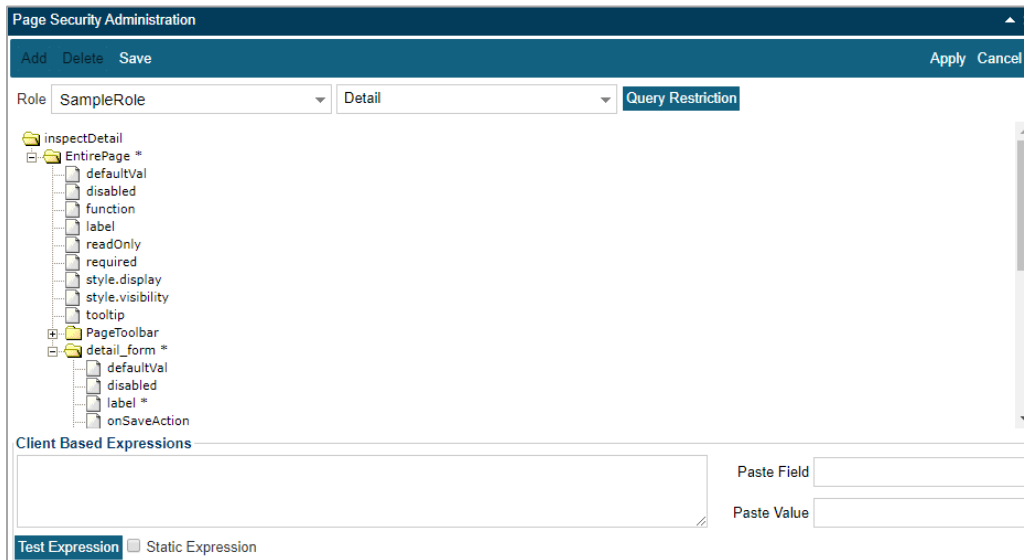
The steps for relabeling a section header are similar to the steps for relabeling a field. The following steps describe how to change a label on one of the Inspection page's section headers.

By default, the Inspection page has the following sections: Inspection, Detail, Policy, Building/Construction, Mechanical/Utilities, Fire Protection, Proximity Exposure/Security, Management Planning and Controls, Common Area (Premise), Materials Management, Personal Safety, and Special Hazards.

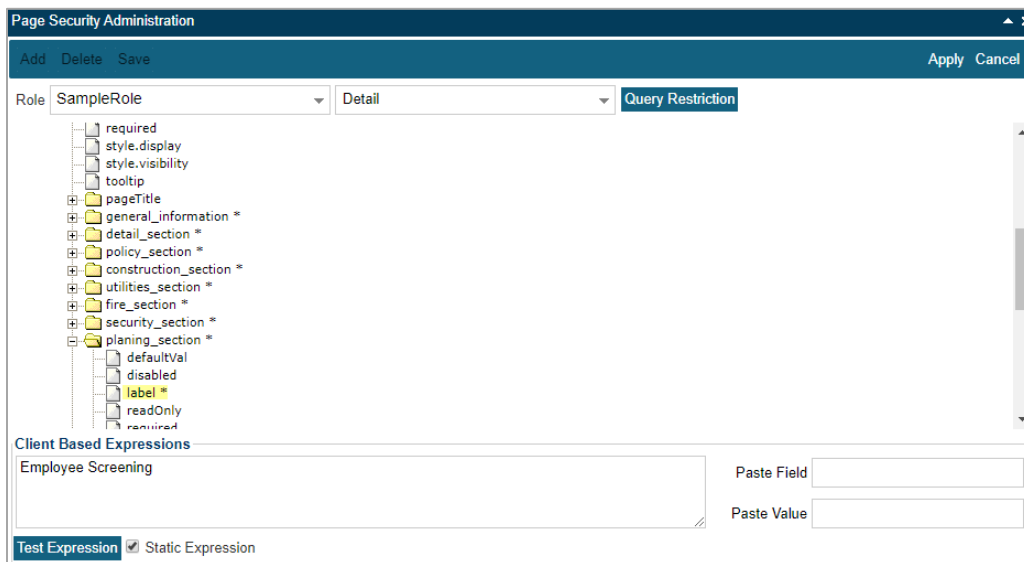
The following example demonstrates how to relabel the existing **Management Planning and Controls** section to an **Employee Screening** section.

1. Use the Asset Search page to search for and open an existing asset record (for example, a building record). When you double-click a record, the system opens it in the Asset page.
2. Click the **Inspection** tab.
3. Expand the **Management Planning and Controls** section and click your mouse pointer in it.

- Click the **Page Configuration** button in the toolbar. The Page Security Administration dialog opens.



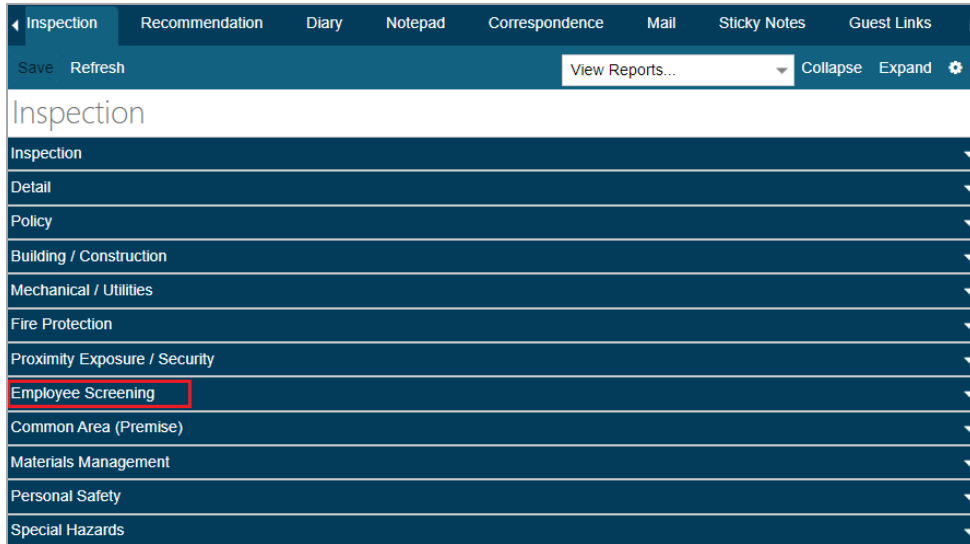
- From the **Role** drop-down list, select the applicable role (i.e., the role that will be able to view the customized section label).
- Leave the default option of **Detail** in the next drop-down field.
- Under the **inspectDetail** folder, expand the **EntirePage** folder, then the **detail\_form** folder, and then the **planning\_section** folder.
- Under the **planning\_section** folder, highlight the **label** attribute.
- In the **Client Based Expression** field, enter the new section label (e.g. **Employee Screening**).



- Click the **Test Expression** button to make sure the expression is valid. Make changes, if necessary.

11. Click **Apply** to apply your changes.

The next time a user with the assigned role opens the Inspection page, the relabeled section appears. You can test this by assigning yourself to the applicable role, logging out and back in, and navigating to the Inspection page.

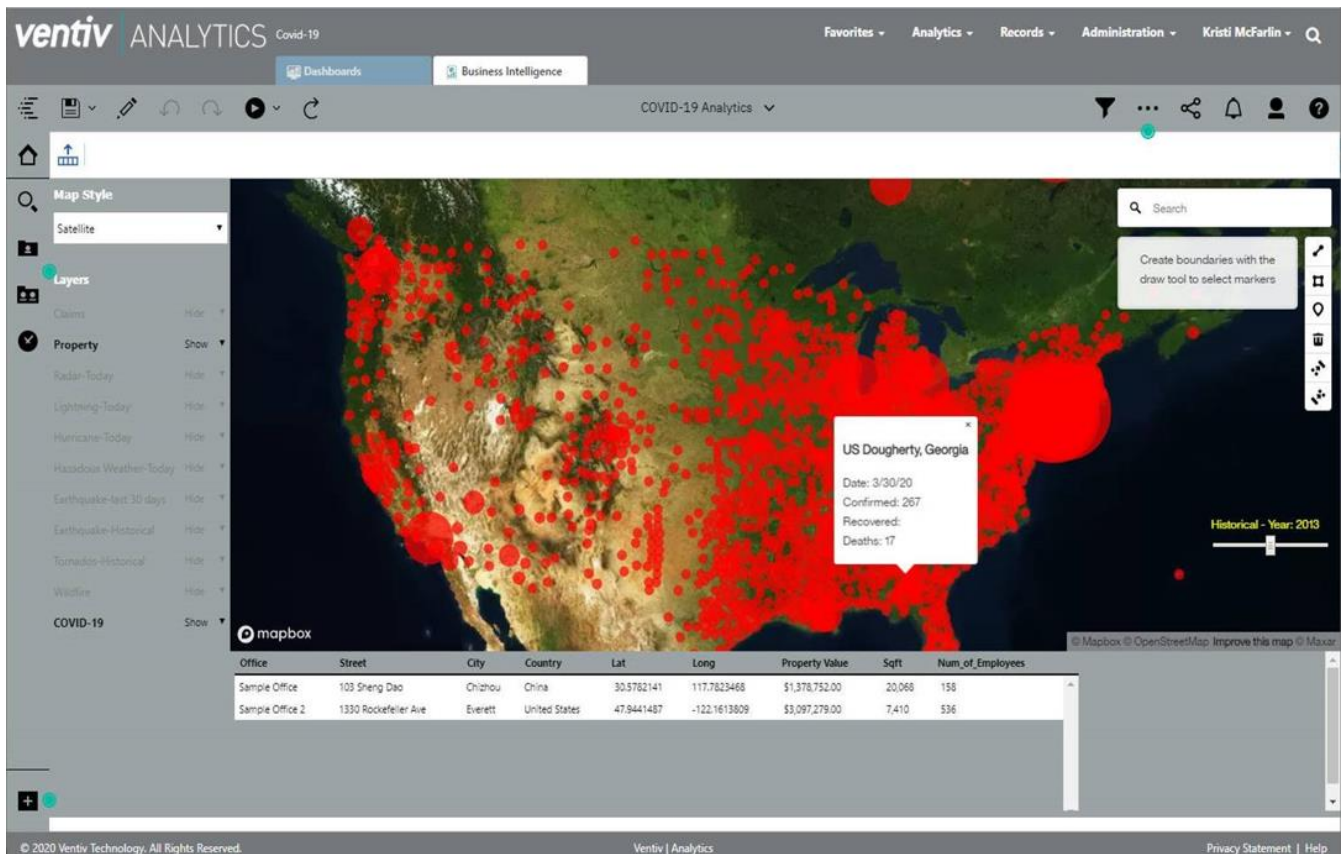


The preceding sections demonstrated how to use existing Reference Table Maintenance and Page Security features to change section labels, change field labels, and add new options to drop-down lists. You can also use Page Security to hide fields or sections to further streamline your workflow.

# Using Ventiv Analytics to View COVID-19 Location Activity

Ventiv has multiple offerings for Analytics regarding Pandemic Risk integrated with additional third-party supplemental data. Asset and organization data can be extracted from Claims Enterprise, geocoded, and imported into the Ventiv Analytics Platform for use within the Geospatial Analytics offering. Ventiv will work with clients to meet their analytic needs and licensing agreements. Ventiv is pleased to provide the COVID-19 data overlays free of charge. Fees for asset data extraction, conversion, geocoding and applicable reporting licenses apply. Please contact your Ventiv representative for additional information on this toolset.

The following illustration shows a map with an overlay of COVID-19 data.



**ventiv** ANALYTICS Covid-19 Favorites ▾ Analytics ▾ Records ▾ Administration ▾ Kristi McFarlin ▾

Dashboards Business Intelligence

COVID-19 Analytics ▾

**Map Style**

Satellite ▾

**Layers**

Claims Hide ▾

**Property** Show ▾

Radar-Today Hide ▾

Lightning-Today Hide ▾

Hurricane-Today Hide ▾

Hazardous Weather-Today Hide ▾

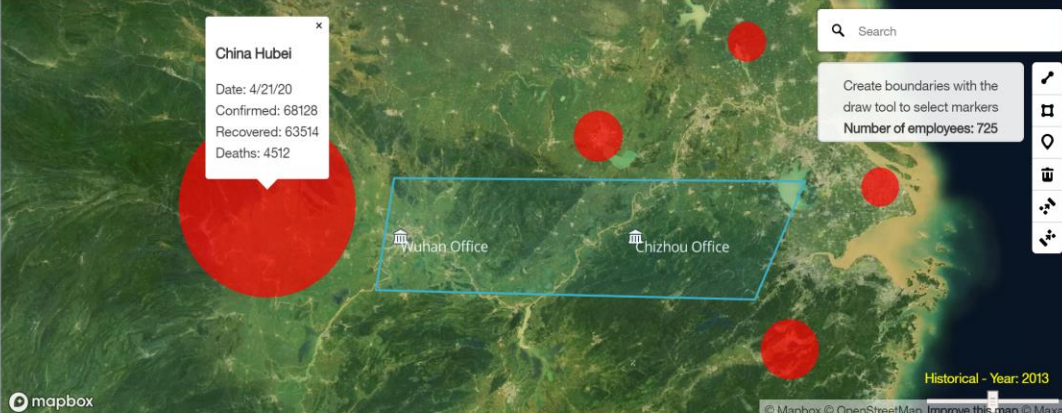
Earthquake-last 30 days Hide ▾

Earthquake-Historical Hide ▾

Tornados-Historical Hide ▾

Wildfire Hide ▾

**COVID-19** Show ▾



**China Hubei**

Date: 4/21/20  
Confirmed: 68128  
Recovered: 63514  
Deaths: 4512

Number of employees: 725

Wuhan Office Chizhou Office

Historical - Year: 2013

| Office                | Street               | City           | Country       | Lat        | Long         | Property Value | Sqft   | Num_of_Employees |
|-----------------------|----------------------|----------------|---------------|------------|--------------|----------------|--------|------------------|
| Everett Office        | 1330 Rockefeller Ave | Everett        | United States | 47.9441487 | -122.1613809 | \$3,097,279.00 | 7,410  | 536              |
| Lawrence Office       | 1198-1140 Indiana St | Lawrence       | United States | 38.962208  | -95.242925   | \$2,676,500.00 | 32,030 | 233              |
| New York Office       | 407 Broadway         | New York       | United States | 40.71892   | -74.002777   | \$1,123,420.00 | 12,303 | 123              |
| San Diego Office      | 2 The Inlet          | San Diego      | United States | 32.625972  | -117.136323  | \$2,987,670.00 | 28,002 | 453              |
| Salt lake City Office | 230 East Temple      | Salt Lake City | United States | 40.768738  | -111.884101  | \$980,875.00   | 22,303 | 122              |

Search

Create boundaries with the draw tool to select markers

Number of employees: 725

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