

# Employee Medical Information

**Important:** If you choose to use these features to track your employees' medical information, it is up to you to make sure you are in compliance with privacy laws regarding this subject. If you would like to set up restrictions on who can access this information, contact our support department. You can also watch our video, "[Set Up Operators](#)," for assistance with creating restrictions.

Use this window to record, view, and filter employee's medical information. This may include Covid Tests, Vaccinations, Drug Tests, Medical Conditions, etc.

Go to **Employees > Employee Medical Information**.

ID #	Emp...	Department	Last Name	First Name	Medical Type	Medical Condition	Date	Medication	Dosage	Test Result	Comments
1	101	BAKERSFIELD	AYALA	JOHN	COVID TEST		02/01/20...			NEGATIVE	
2	104	BAKERSFIELD	BALTAZAR	VICTOR	COVID VACCINATI...		02/04/20...			N/A	First Covid Vaccina...
3	108		CASTRO	PEDRO	COVID TEST		02/04/20...			POSITIVE	

## Medical Type

By default, your program will have the following four options:

- Covid Test
- Covid Vaccination
- Drug Test
- Medical Condition

**Note:** If you would like to add a different Medical Type, go to *Employees > Setup > Selection Table Entries*. Use the **Type of Entry** drop-down to select **Medical**. Click into an empty line on the grid and type the new Medical Type.

### Department

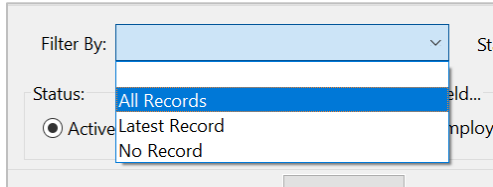
You can filter records by department type; use the drop-down to select a department.

### Filter By:

*All Records:* All records will show.

*Latest Record:* Only the latest record for **each employee** will show.

*No Record:* Use this filter to find employees with no record.



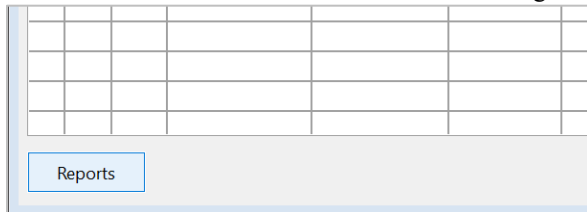
### Starting/Ending Date, Status, Sort Field, Sort Order

Use these filters to refine and sort your search.

## Medical Information Report

### Reports

To print a report or generate an excel file for the grid above, click Reports and the Medical Information Report window will open. All filters will automatically be selected by the program to match the filters you chose to filter the grid.



From the Medical Information Report window, you can choose to print the report or generate an excel file.

## Adding Records

To add a record in the Employee Medical Information window, click **Add**. The following window will open.

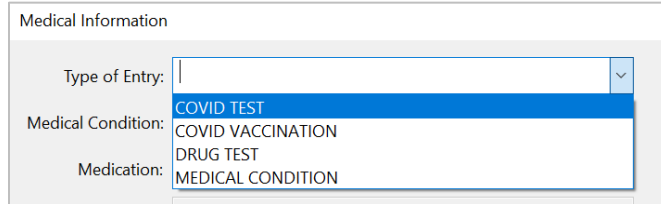
Now you can use the entries to create a new Medical Information record.

### Employee #

Select the employee for the new Medical Record.

### Type of Entry

Use the drop-down to select the record type (i.e. Covid Test, Vaccination, Drug Test, Medical Condition, etc...)



Medical Information

Type of Entry:  ▼

Medical Condition: COVID TEST

Medication: COVID VACCINATION

DRUG TEST

MEDICAL CONDITION

### Medical Condition

When Medical Condition is selected, the *Medical Condition*, *Medication*, and *Dosage* entries will be available to enter information.

### Date of Test/Entry

Enter the date the employee took the test, or if unavailable, the date of entry.

### Test Result

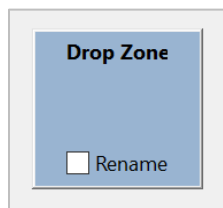
Use this entry to select the employee's test results. This may be used in the case of Covid testing or drug tests.

### Additional Info

Enter any notes you need for this record.

### Drop Zone

This feature is only available for customers using our Document Management software. Use this feature to drag-and-drop medical documents/files you would like to attach to this record.



## Medical Tab: Employee Record

You can also enter Medical Information records directly in an employee's file.

Go to **Employees > Employee Entry > Medical tab**. Then select an Employee Account.

HR Employee View

Account #: 101 Name Key: AYALAJOHN05 Social Security #: 775 00 0005 ?  e-Verified  Active PIN: 0

Credit Cards Equipment ACA Employee Documents

Employee Info Deductions Totals Notes Direct Deposit Dependents Health Benefits Retirement Medical Emerg Contacts Training Complaints Litigation Warnings Injuries

Type	Date	Test Result	Medical Condition	Medication
COVID TEST	2/1/2022	NEGATIVE		

Comments:

Add Edit Delete Reports

Medical Exam Information:

Date of Last Medical Exam:

Exam Expiration:

Reason for Exam: None

Terminate Rehire Print Profile Save Delete Clear

Click **Add**, the Medical Information window will open.

Medical Information

Type of Entry: COVID TEST

Medical Condition:

Medication:

Dosage:

Date of Test/Entry: 02/01/2022

Test Result: NEGATIVE

Additional Info:

Drop Zone

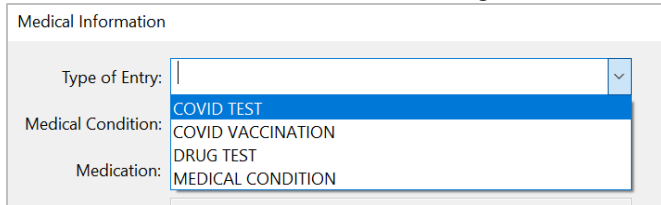
Rename

OK Cancel Delete

Now you can use the entries to create a new Medical Information record.

### Type of Entry

Use the drop-down to select the record type (i.e. Covid Test, Vaccination, Drug Test, Medical Condition, etc...)



The screenshot shows a form titled "Medical Information". It has three main sections: "Type of Entry:", "Medical Condition:", and "Medication:". The "Type of Entry:" section has a dropdown menu that is currently open, showing four options: "COVID TEST" (highlighted in blue), "COVID VACCINATION", "DRUG TEST", and "MEDICAL CONDITION".

### Medical Condition

When Medical Condition is selected, the *Medical Condition*, *Medication*, and *Dosage* entries will be available to enter information.

### Date of Test/Entry

Enter the date the employee took the test, or if unavailable, the date of entry.

### Test Result

Use this entry to select the employee's test results. This may be used in the case of Covid testing or drug tests.

### Additional Info

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