TSI Link™ for Respiratory Protection

Quick Start Guide (US)

Overview

TSI Link™ for Respiratory Protection provides a centralized, web accessible application for FitPro™ Ultra, keeping everything in sync and in one place. The data also can be integrated with Customers HR or other systems. The application includes a Program Management Portal for managing fit testing, scheduling, respirator training, and medical clearance. The application saves time and improves coordination.

1. Log in and Get Started

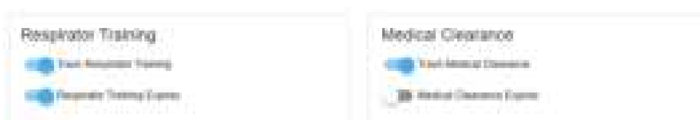
Activate Your Account:

1. Go to the [TSI Website]() and request a subscription.
   A TSI representative will follow up with you
2. After an order is placed, you'll get a welcome email to register for a TSI online account.
3. If you don't already have one, register for a TSI account login at [TSI.com/register](). Detailed instructions are on the right side of the page
4. Log in to **TSI Link™ for Respiratory Protection** at [https://resfit.tsilink.com/]() using your TSI account login
5. The first user on the account will need to enter the **Activation Code**.

2. Configure Your Settings

Choose the **Settings** tab on the left side to start configuring the Program Management Module

ACCOUNT Tab



- **Toggle Tracking and scheduling** on or off for: Respirator Training and Medical Clearance

- If **Tracking is ON** but **Expiration Tracking is OFF**: You'll see statuses as **Compliant** (if completed) or **No Record** (if not), but the system won't flag expirations.
- If **Tracking is ON** AND **Expiration Tracking is ON**: You'll see all compliance statuses and expirations associated with Respirator Training and Medical Clearance.

Statuses without Expiration Dates

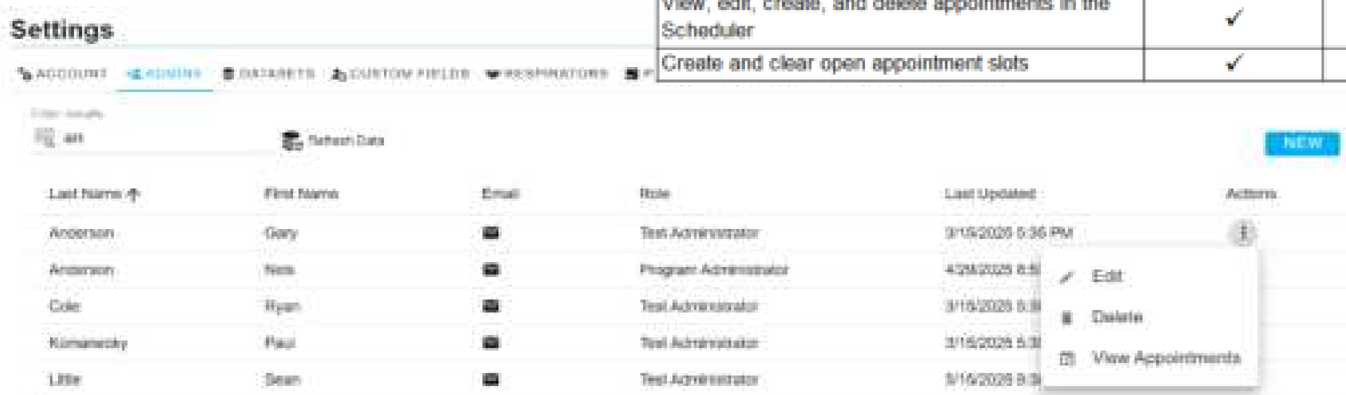
Statuses with Expiration Dates

These settings impact what you see in **Program Status**, **Manage People**, and **Scheduler** pages.

ADMINS Tab

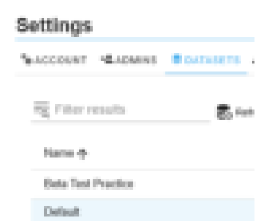
- Lists the two types of Admins: **Program** and **Test Administrators, who have different functionality**
- Add NEW or Delete Admins
- See appointments assigned to each admin

Functionality	Program Admins	Test Admins
View and filter on the Program Status page	✓	✓
View records within the Settings tabs	✓	✓
Edit, create, and delete records within the Settings tabs	✓	X
Import data in the Settings Import tab	✓	X
View, edit, create, and delete employees from the Manage People page	✓	✓
View fit test records	✓	✓
Edit aspects of fit test records (Notes, Next Test Date, Respirator Size)	✓	X
View, edit, create, and delete appointments in the Scheduler	✓	✓
Create and clear open appointment slots	✓	✓



3. Select Your Dataset

Choose which dataset you would like to use.   Different Data Sets can be used to separate data from different location or departments. When the new company first access the portal they will see two data sets:

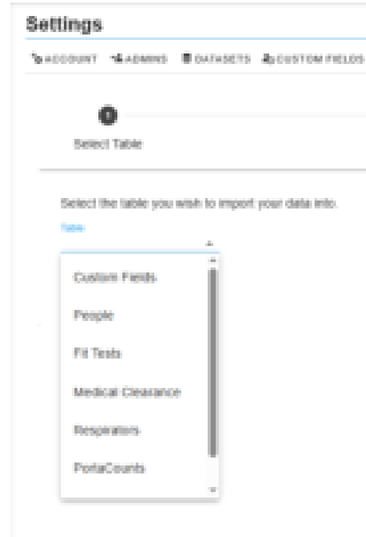


- **Default** – Use this dataset for all your day-to-day data and regular program activity.
- **Sandbox** – Use this for testing features or workflows. You can safely upload data here without affecting your live or frequently used records.

Note: information that has been imported, or manually added, will only be added to the Active Dataset that was in use at that time.

4. Import Your Data

Upload your data using CSV templates files in this order for best results:



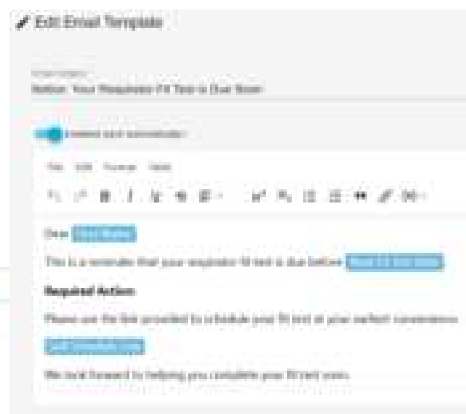
1. **Custom Fields**
   - Set them up manually or import them first via CSV.
2. **People**
   - Use the exporting of people's records from each FitPro™ Ultra instance.
   - Choose **Overwrite** if importing records with duplicates.

   Tip: FitPro™ Ultra exports don't include all fields included in TSI Link for Respiratory Protection. Importing data from a training or HR system can ensure you add the information for all the right people

3. **Fit Test & Medical Clearance**
   - Import this data after People are loaded.
4. **Respirators, PortaCounts, and Daily Checks**
   - Set up Respirators and PortaCounts manually, or import them at any time.
   - Import Daily Checks at any time.

For data that will be updated more frequently, you can integrate to the API. Detailed specs are available on [TSI's API Developer's Portal.]()

5. Customize Your Automated Emails



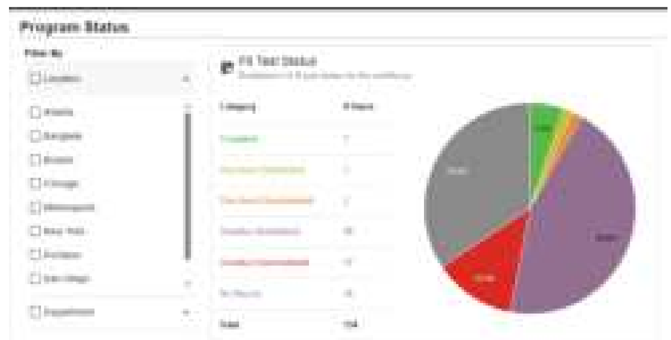
- Go to the **Email Templates** section in Settings.
- Enable or disable templates as needed.
- Personalize your messaging for each email type

6. Manage People

- **Configure your view**: Hide or show columns as needed.

- Columns are *sticky*—your view stays the same after refresh or login/logout.
- **View past employee records**: Clicking View Details on an employee record will display a menu that includes Info, last Fit Test, Medical Clearance, Respirator Training, and all upcoming appointments.
- **Add Supervisors manually**: Best practice is to assign supervisors as users are fit tested.
- **Export to Excel**: View up to 1,000 records per page. Copy and paste directly into Excel if needed.

7. Configure Program Status



- **Customize your view** with filters and columns.
  - Filters are *sticky*—they stay applied after refresh or login/logout.
  - By default, no filters are applied (this includes records with blank values).
- Use this page to get a high-level view of compliance across all categories.

8. Scheduler: Set Up and Start Booking

The **Scheduler** is your central hub for managing appointments across Fit Testing, Medical Clearance, and Respirator Training.

View and Manage Appointments

The **Appointments** tab shows a calendar-style view of all scheduled events and available time slots.

- **View Options**: Toggle between **Day**, **Week**, **Month**, or **Agenda** views.
  - *Agenda view* gives a full list of all appointments and open slots for a selected day.
- **Filter Options**:
  - Filter by **event type** (Fit Test, Medical Clearance, Respirator Training)
  - Choose to show only **scheduled** events or **your own** events

To schedule an appointment:

People will self-schedule using the applications automated emails. If an admin wants to schedule an appointment within the application:

- Click on an **open slot** and assign an attendee
  OR
- Click on any blank space to create a new slot and assign an attendee

Subscribe to Your Calendar

Sync your Scheduler with your personal calendar:

1. Click **Subscribe**
2. Select your calendar type (Google, Outlook, etc.)
3. Choose event types and whether to include just your own events and open slots
4. Click **Subscribe** to connect and sync automatically

Manage Appointment Slots

The **Manage Slots** tab lets you create and control the availability of appointment times.

To Create Appointment Slots:

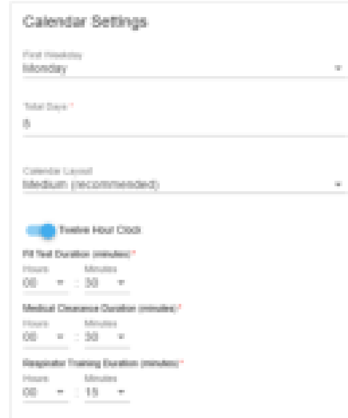
1. Select a **Category** (Fit Test, Medical Clearance, or Respirator Training)
2. Choose the **date(s)** and **time(s)**
3. Set the **duration**
4. Assign an **Admin**
5. Choose a **Location**
6. *(For Fit Tests only)* Select a **PortaCount**

To Clear Appointment Slots:

1. Choose a **Category**
2. Select the **date range**
3. Specify the **time window**

Note: Open slots appear in the **Self-Scheduling Link**, sent through automated emails, where users can choose an available time.

Customize Scheduler Settings



Use the **Scheduler Settings** tab to adjust how your calendar looks and works:

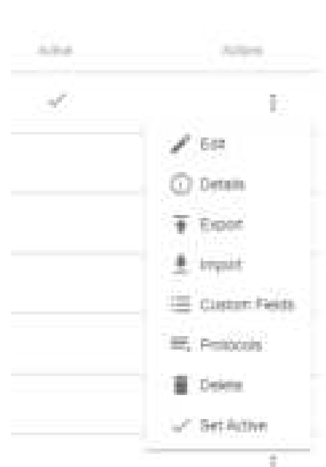
- Set the **start day** of the week
- Choose how many **days** are shown at once
- Define **event size** on the calendar
- Choose between **12-hour** or **24-hour** time format
- Set **default appointment durations** for each category

9. Ensure Connection with FitPro™ Ultra

Make sure FitPro™ Ultra is connected to TSI Link™ for Respiratory Protection and using real-time cloud data.

Connection Steps

1. **Open FitPro™ Ultra** on your device.
2. On first login, you'll see a **Welcome screen**—click through to continue.
3. You will then need to do a **one-time acceptance**, giving the application permission to access your account.
4. Select **"LOG IN TO TSI LINK™ FOR RESPIRATORY PROTECTION CLOUD"** (if not already on that page).
5. **Log in** using your TSI credentials.
6. In the side menu, go to **Data Management**.
7. Choose the **dataset** used in TSI Link™ for Respiratory Protection and set it as **Active**.
8. Confirm that your **cloud data appears** and updates in real time.



When connected, your data will flow between FitPro™ Ultra and TSI Link™ for Respiratory Protection—keeping everything up to date across both platforms.

Knowledge Beyond Measure.

TSI Incorporated – Visit our website www.tsi.com for more information.

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