

Lab Web Portal (LWP)

Quick Start Guide



This document provides a quick overview of the Lab Web Portal functionalities. Its goal is to guide you to perform basic portal tasks, like submitting test orders to state lab, monitoring testing progress and accessing published reports. Its content may differ in some details from some of the products described.

All information provided here is subject to change without notice.

Document Revision History

Revision	Author	Date	Status and Description
1.0.	Laura Corvin	04-21-2020	Document created.
1.1.	Andrew Sinyaver	04-23-2020	Updated screenshots and formatting.
1.2.	Marina Goldshtein	06-13-2020	Updated screenshots and formatting. Added the Batch Test Ordering section.
1.3.	Marina Goldshtein	06-17-2020	Added the My Patients section.

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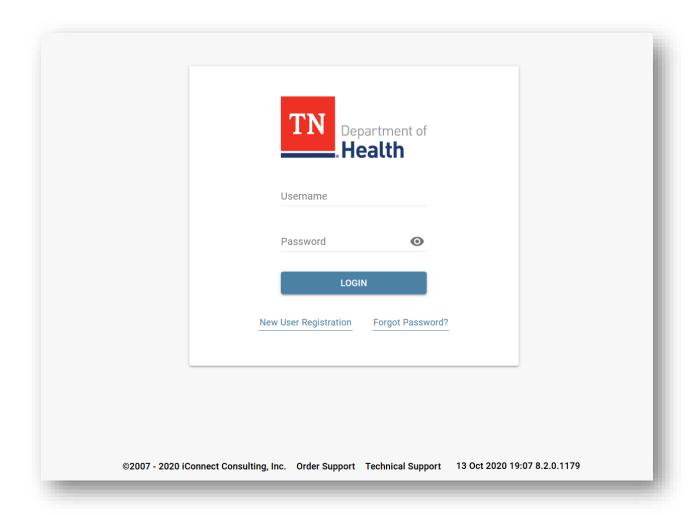
For TN Primary Technical Support: Call 615-837-5473

Welcome to Lab Web Portal (LWP)

The Production URL

Access the Portal login page by using the following URL:

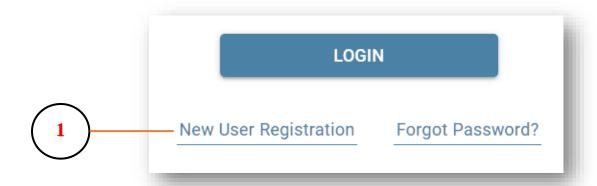
https://lwp-web.aimsplatform.com/tn2/#/



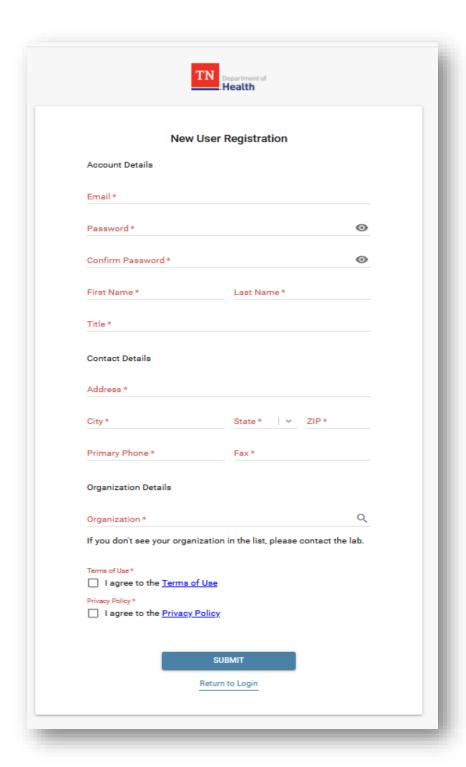
- Click **Order Support** link at the bottom of the page to view lab contacts and information on where to send your specimens.
- Click **Technical Support** link at the bottom of the page for technical support contacts.

Create New Account

1. Click **New User Registration** link under the **Login** button.

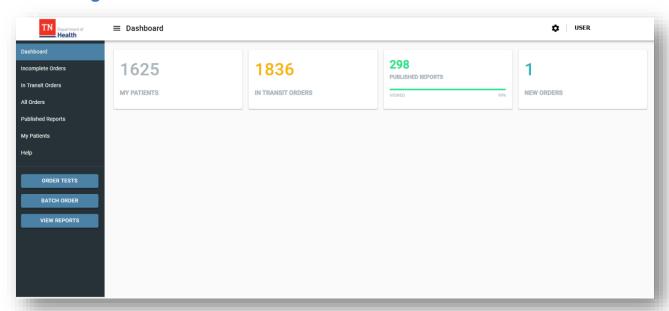


- New User Registration page is displayed.
 - Under the Email add an active email, it will be used as a username.
 - Complete the rest of the fields. Please use the address of your primary facility.
 - Start typing the name of your submitting facility into **Organization** field to see if it already exists in the portal.
 - If a match is found, select your facility from the popup list.
 - If you are affiliated with multiple facilities, please contact Technical Support after registering to have additional facilities added to your application user account.
 - Review "Term of Use" and "Privacy Policy" documents by clicking on the links.
 - Check the boxes next to "Terms of Use", "Privacy Policy" to agree.
 - Agreement is required to request access.
 - Click on **Submit** to complete user registration process. A new user registration request will be sent to the portal admin for approval.
 - Once the request is approved, the user will be notified via email and will be able to login to the portal.
- Navigate back to the login page, type in the username and password and click on Login button to access the Portal.



Navigating the LWP

The Navigation Panel



- Dashboard is the first page you will see after logging into the Portal.
 - It is the "control center" of the LWP where you can view key performance indicators and charts, track status of the existing test order, and view published patient reports.
 - The Dashboard is editable: click on the point on the upper right corner, next to your name;
- Incomplete Orders started, but not yet submitted orders;
- In Transit Orders orders that have been submitted but not yet received by the lab;
- All Orders all samples submitted by user organization regardless of status;
- **Published Reports** orders with published reports. Shows all orders with published reports per user organization. Orders with unread (not viewed) reports are shown in bold; orders with read (viewed) reports are shown in normal font;
- My Patients view your patients' list;
- **Help** view portal help.
- Collapse the Navigation Panel by clicking the
 button next to the logo in the upper left corner. This functionality applies to other pages in the portal as well.

NOTE: Not every user role has access to all options.

The Call-to-Action buttons

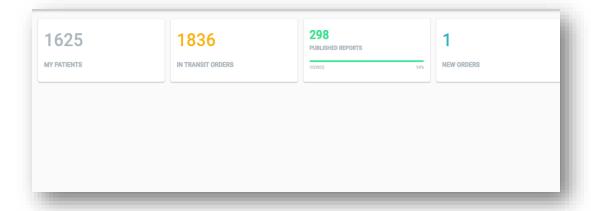
There are 3 blue buttons on the bottom left side of the Navigation Panel.

- Order Tests order tests using a preconfigured Test Requisition Form;
- Batch Orders upload multiple test orders at once;
- View Reports view all "unread" reports published for user organization.

The Tiles

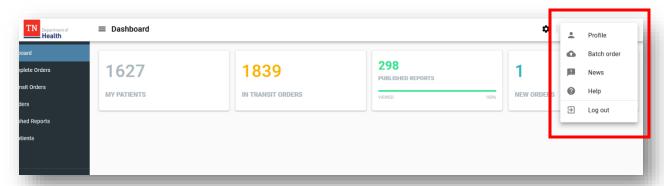
The tiles you see on your Dashboard are your counters and key performance indicators.

- Click to open relevant data grids.
- Number on top indicates total number of published reports for user organization.
- Progress bar indicates percentage of the "viewed" reports vs. "not viewed."

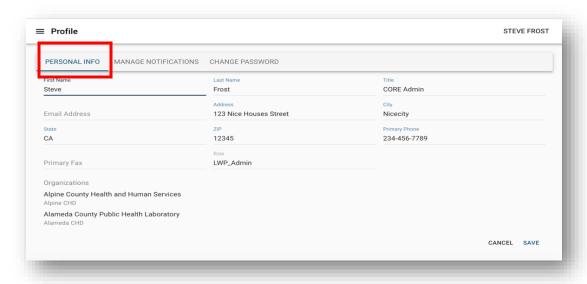


User Drop-Down Menu - Profile

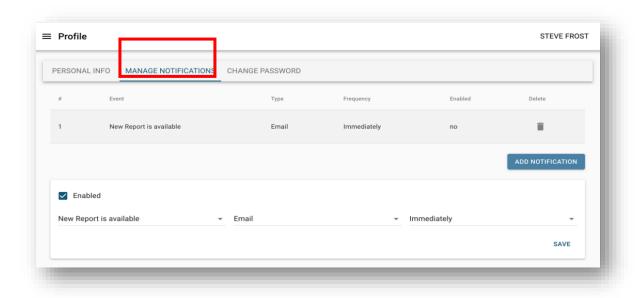
The drop-down menu on the upper right corner offers additional resources.



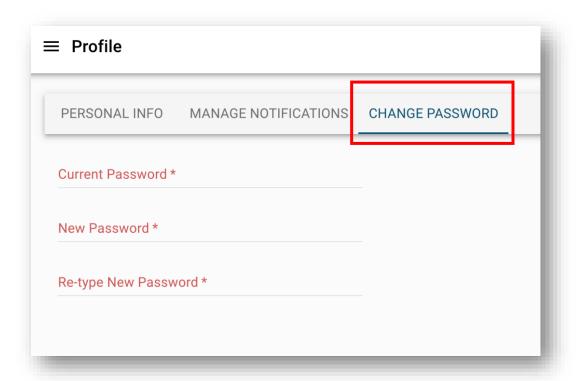
• Personal Info – view and edit your personal information;



• Manage Notifications - add personal preferences for Portal notification events;



• **Change Password** – use to change your password.



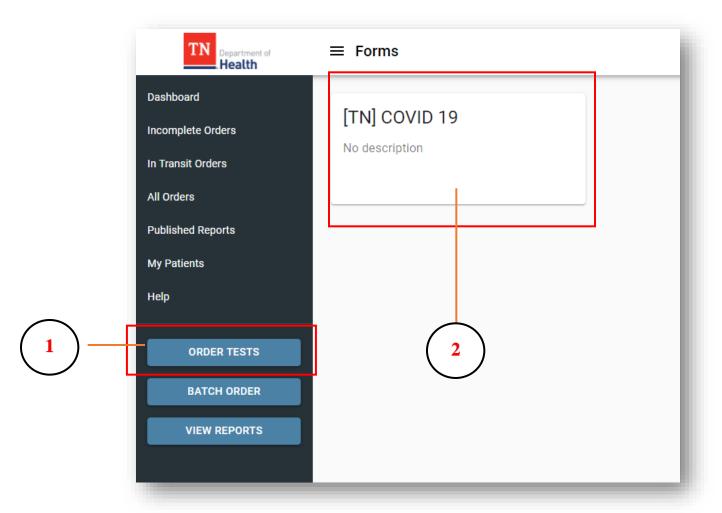
- **News** view portal news/announcements.
- Log out to log out of Portal

Order Tests

Test Requisition Form (TRF)

1. Click **ORDER TESTS** Call-to-Action button and choose the "[TN] COVID 19" Assay Tile form to order tests;

Note: You may have access to one or multiple forms depending on your user role.

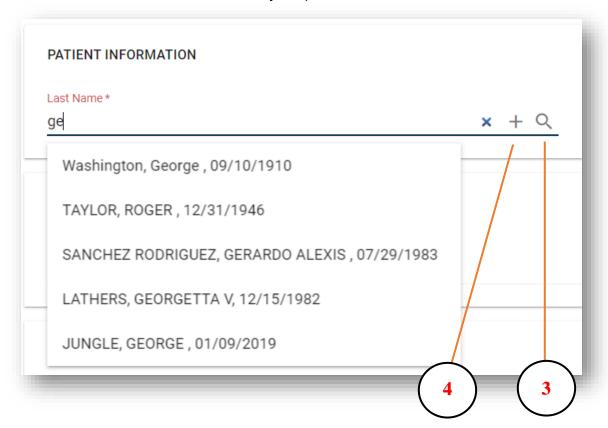


2. Find the tile to the right of the Navigation Panel. Click on the "[TN] COVID 19" Assay Tile to open TRF;

Patient Information section of TRF

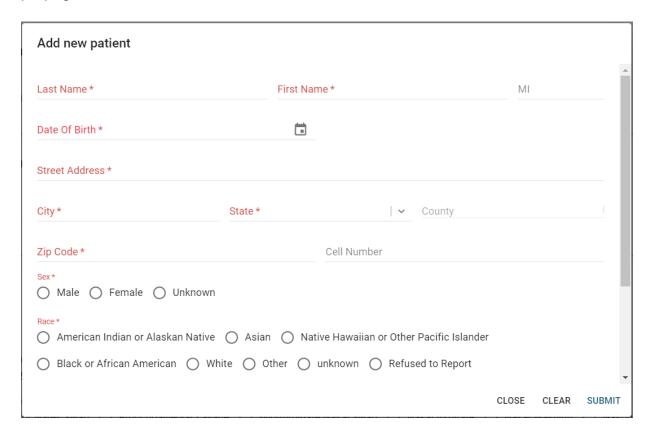
Note: The fields that are required are indicated in red with an asterisk.

- Type the patient's name in "Last name" and select from the drop-down options;
- Confirm the DOB match to your patient's information.



- 3. **Search –** open more detailed lookup;
- 4. **Add** if you confirmed that the patient is not in the system by using the detailed lookup, add a new patient with the + icon.

Use "Add new patient" form to enter all the necessary patient information and click **Submit**. New patient will be added to the system and related information propagated to the main form.



Edit Patient information by clicking on icon.

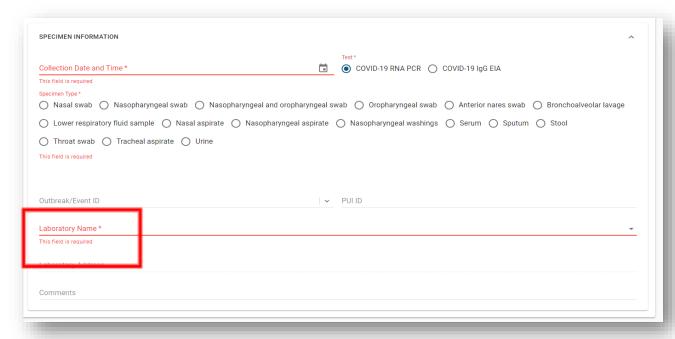
Delete selected patient information by clicking on × icon.

- Submitter Information section of TRF:

Health Care Facility Name: will be based on your facility affiliation.

- If you are affiliated with a single facility the name will automatically be displayed.
- If you are associated with multiple facilities, you can choose one associated with the test order by clicking the magnifying glass button, selecting a facility in the lookup and clicking Apply.

- Specimen Information section of TRF:
 - Choose the Collection Date and Time from Calendar icon or type the desired date and time.
 - Choose Test type
 - Select Specimen Type from the list of available values



- Enter the Outbreak/Event ID and PUI ID, if applicable
- Choose the Laboratory Name* from the drop-down menu

CRITICALLY IMPORTANT: Pick your designated testing facility to reduce testing delays.

 In the event that a sample is sent to a different testing facility than chosen, the order must be corrected at facility.

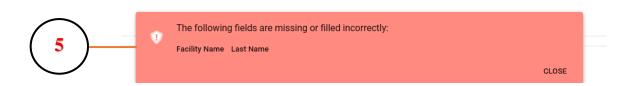


Enter additional comments in the Comments field, if necessary

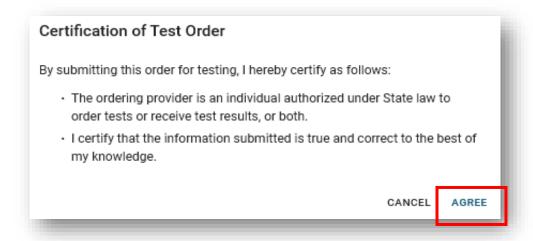


5. Click **Submit** button upon the completion to submit your order.

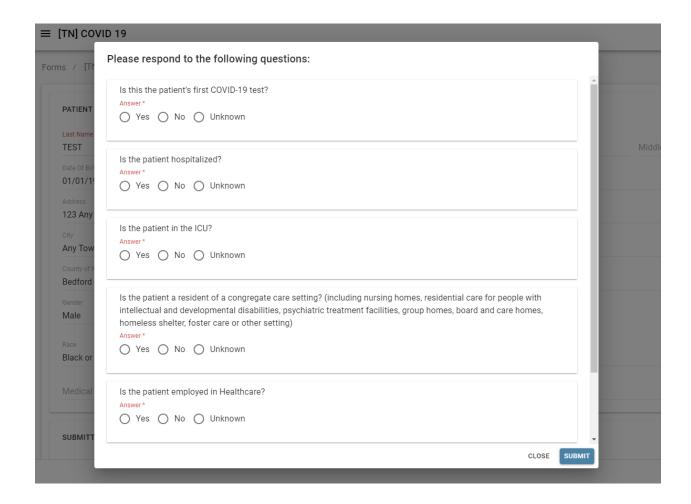
Note: If any of the required fields are not populated or populated incorrectly, an error will appear to show the missing fields. User can click on any field in the dialog and get navigated to the exact place where field is located on the form to correct the issue.



Once test order is ready to be submitted, "Certification of Test Order" message is displayed. User needs to click AGREE to move forward.



Finish placing the order by providing responses to the Asked-At-Order-Entry (AOE) questions.



Once test order has been submitted, confirmation message is displayed.

Note: The Portal Order ID (in bold below) uniquely identifies the test order in the system.

Order Placed

Your test order OIDIL200000012 has been successfully submitted. Please check All Specimens section of your Dashboard for status updates.

Click Print button below to view/print the completed submission form.

Click Copy Order button to apply current order information to the new order.

PRINT COPY ORDER CLOSE

- 1. Click **Copy Order** to continue adding more orders for your facility. It will copy all the information from the current order except patient and insurance information.
- 2. Click **Print** button to print the Order Manifest in a pdf format.

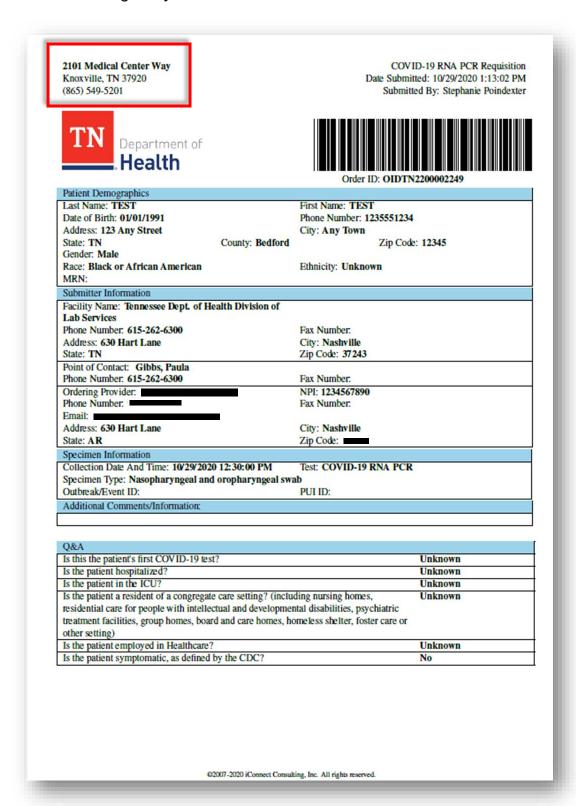
Note: The barcode in the upper right corner represents the Portal Order ID.

A printed copy of the Order Manifest should always accompany the specimen.

The Order Manifest can be accessed at any point by clicking on the value under Portal Id column in the **All Orders** data grid.

Note: Once the clicking close on the confirmation message, the TRF will be displayed for the next patient. If no additional patients are to be entered, navigate back to the dashboard to close the TRF.

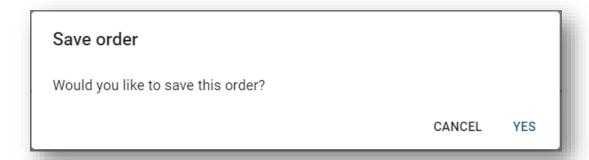
CRITICALLY IMPORTANT: The sample must be submitted to the chosen testing facility as indicated in the top left-hand corner of the Order Manifest to reduce testing delays.



Saving Test Orders

Incomplete test orders can be saved to be completed and submitted later.

- Click the **Save Order** button in the bottom right corner of the Test Order form.
- Click Yes in the dialog below.



Confirmation message is displayed.

Note: The Portal Order ID uniquely identifies test order in the system.



- The saved order will be placed in the **Incomplete Orders**.
 - A navigation link will be accessible on the **Dashboard**.
- To retrieve the saved order, go to the **Incomplete Orders** navigation link, locate the order record and click on it.
 - To discard saved order, click on the icon.

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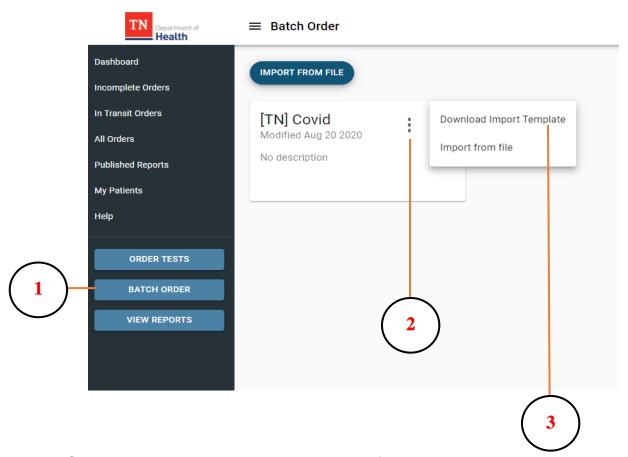
Batch Order

Upload multiple test orders at once.

Download the **Import Template** that has all the required fields and response options required for the Batch Order <u>prior</u> to specimen collection and submission. This is important in order to correctly gather the required order fields and patient information.

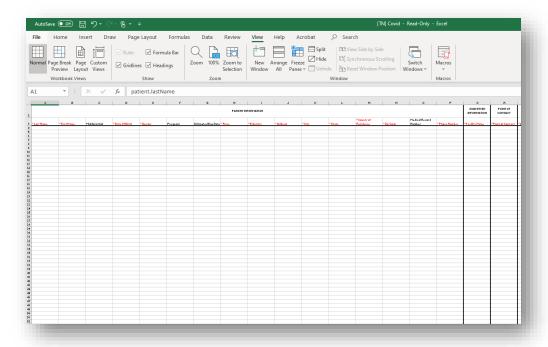
To Download the Excel Spreadsheet

1. Click BATCH ORDER button on the Dashboard.



- 2. Click the 3-button link on the upper corner of the tile.
- 3. Select **Download Import Template** from the two menu options. Save the excel spreadsheet.
- Open the saved Excel Spreadsheet and fill the required details in the fields.
 Note: the dropdown menus for some of the required values.

- 5. Enter one line for each specimen that is being submitted.
- 6. Requirements of the Batch Import Template:
 - All fields in red are required
 - ALWAYS download it for every use

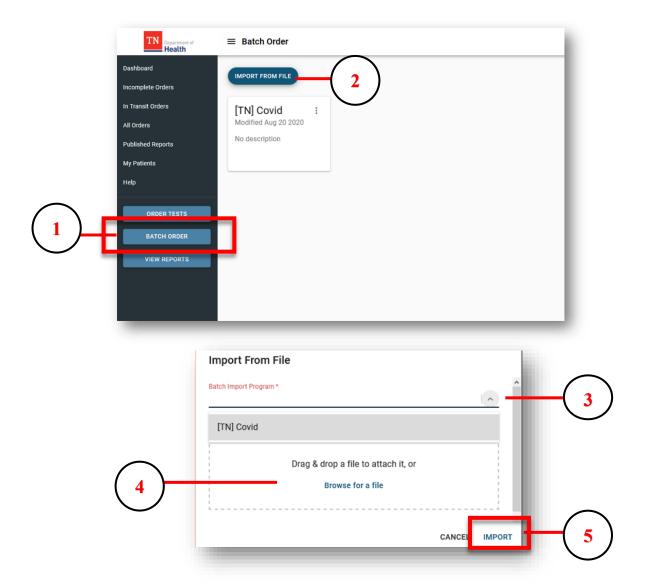


To Import the Batch Order Spreadsheet

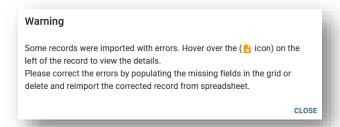
- 1. Click the **Batch Order** Call-To-Action Button
- 2. Click **IMPORT FROM FILE** to open the file import box

NOTE: The Import from File option can also accessed by clicking the i icon on the [TN] Covid Tile

- 3. Click the down arrow for Batch Import Program, select [TN] Covid
- 4. Drag & Drop the completed Batch Import Template File, or click Browse for a file to search for the file on your computer
- 5. Click **IMPORT** to import the file



NOTE: If the required fields are not completed in the Batch Import Template an error message will be displayed to notify the user to correct the errors in the grid or to delete the entries and reimport the completed spreadsheet.



Once the spreadsheet is imported, verify the entries are correct and click **SUBMIT** to submit the batch order.

Accessing Orders, Reports and Patients

Tracking Order Status

To see a status of your test order, open **All Orders** grid, locate your order and look for a value in the **Status** column. It can be one of the following:

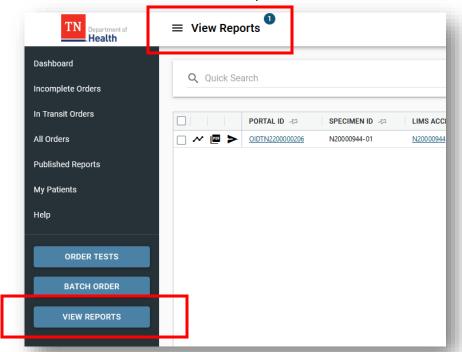
- InTransit order has been submitted but not yet received by the lab
- ReceivedInLab order has been received in lab but not yet tested
- InProcess order is being tested by the lab
- Released testing is done, order is released, results reports published
- Canceled order is canceled

To view order related events across time, open **All Orders** grid, locate your order and hover over ***** icon:



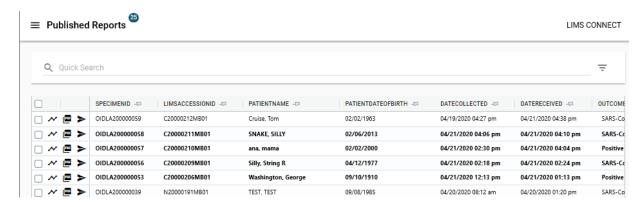
Viewing Reports

To view new (i.e. unread) published reports, click **VIEW REPORTS** button in the navigation bar. The number of unviewed reports will be notated in the header.



The **View Reports** grid is displayed.

- Not viewed orders are displayed in bold.
- Once report has been viewed, the order disappears from the View Reports grid and moves to the Published Reports grid.



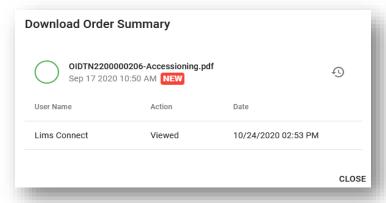
Click on icon to view all published patient reports associated with an order.

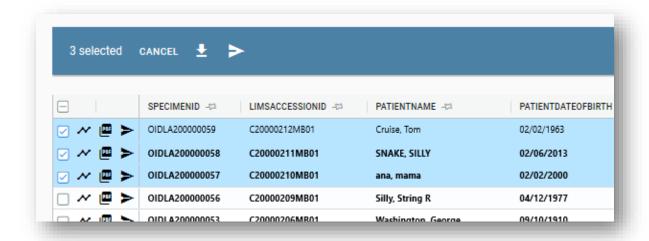
Note: Latest report always appears on top.

Unopened reports will have a "NEW" tag in red and no checkmark inside the green circle. The type of the report (Final, etc.) will be displayed as a part of the PDF name.



Use
 O to open report history which provides an audit trail of all the actions taken
 on the report (viewing, sharing, etc.)





- Click on > icon to share published patient report with a 3rd party.
- Populate Subject, Email addresses, Message and click Submit.

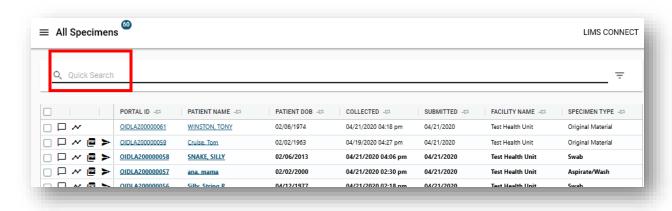
Note: recipient will get temporary access to the portal to download shared reports. To download or share multiple patient reports at once, select multiple orders and then click on to download a single PDF with multiple patient reports or to share multiple patient reports at once. Results Reports can also be viewed in the All Orders data grid.

Data grids

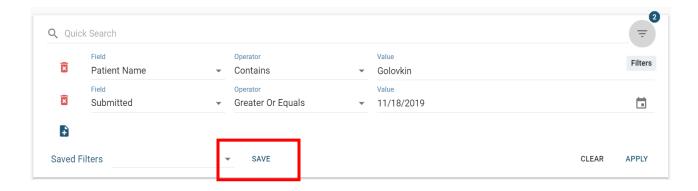
- Click on any column header to the sort the grid. To sort by multiple columns, click and hold Shift and click on the column headers.
- Click on to pin one or multiple columns to the left side of the grid.

Quick Search

Use Quick Search box at the top to search across all columns in the grid:



Click on \equiv button to open filter panel for advance search options like searching on multiple fields at the same time, use date ranges, etc.

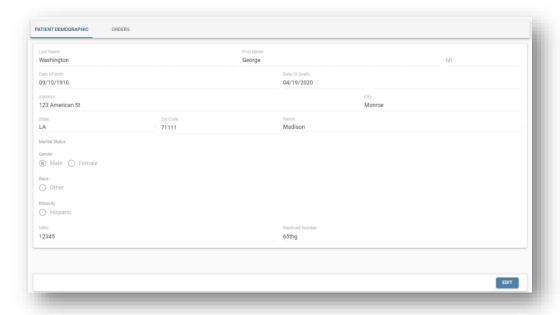


Use the **SAVE** button to save filters for repeated searches.

Patient Information

To access your patients at any time, click on **My Patients** link in the navigation bar. Search and click on the patient record to open patient information page.

Note: Patient page can also be accessed from **All Orders** grid by clicking on a Patient Name.



Patient Demographics page – displays patient demographic information. Information can be edited and saved.

Orders – displays all submitted orders for the patient. In addition to being patient specific, orders are also filtered by organizations user has access.

