Lab Web Portal - GC ARLN

Introduction

NOTICE

NO PATIENT DATA WAS USED IN THIS PRESENTATION.

ALL "PATIENT" INFORMATION HAS BEEN FABRICATED FOR TRAINING PURPOSES.
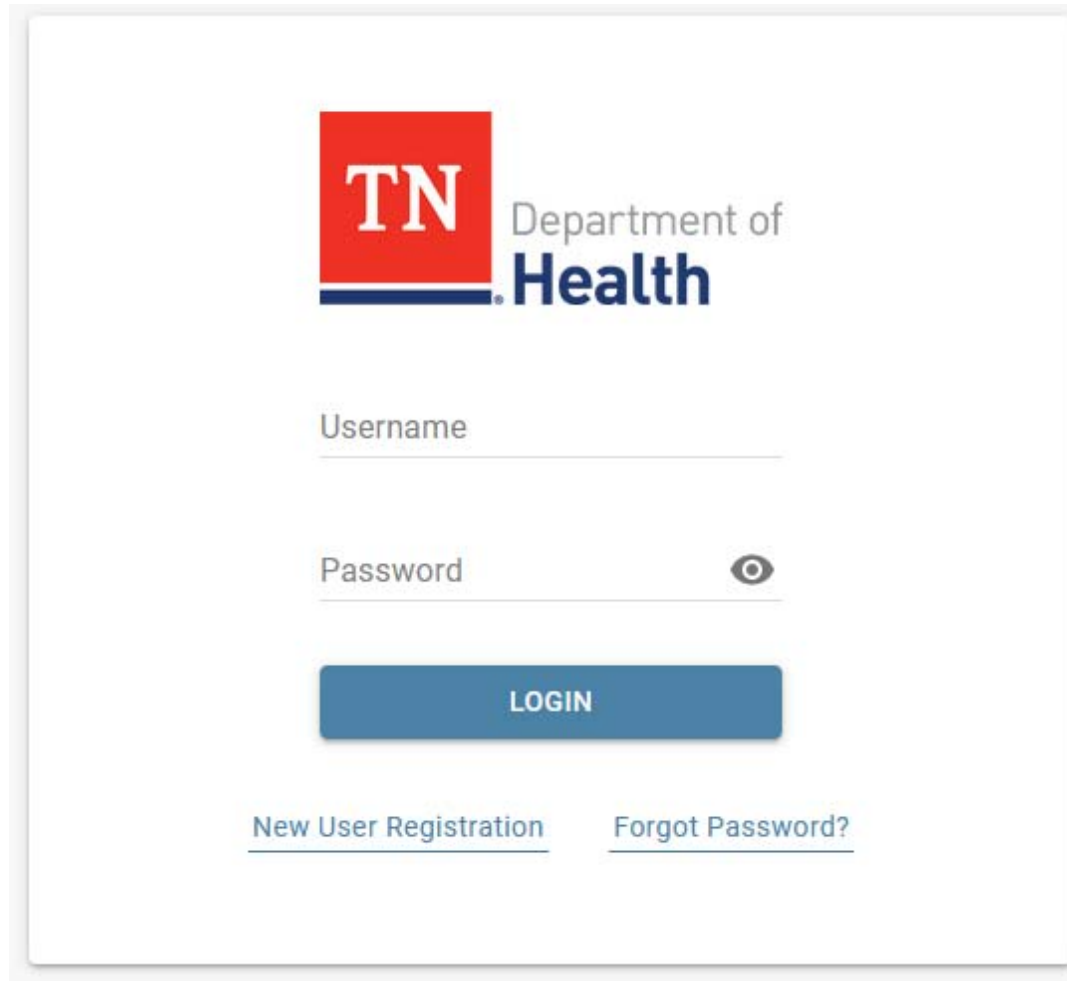
Welcome to the Lab Web Portal (LWP)

TN

Accessing the Lab Web Portal
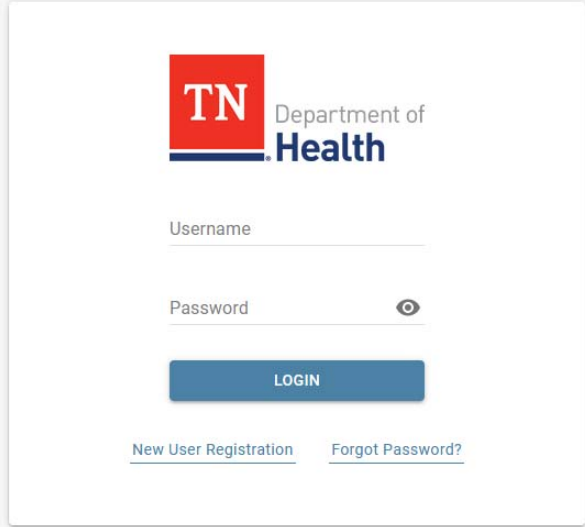
https://lwp-web.aimsplatform.com/tn2/#/auth/login
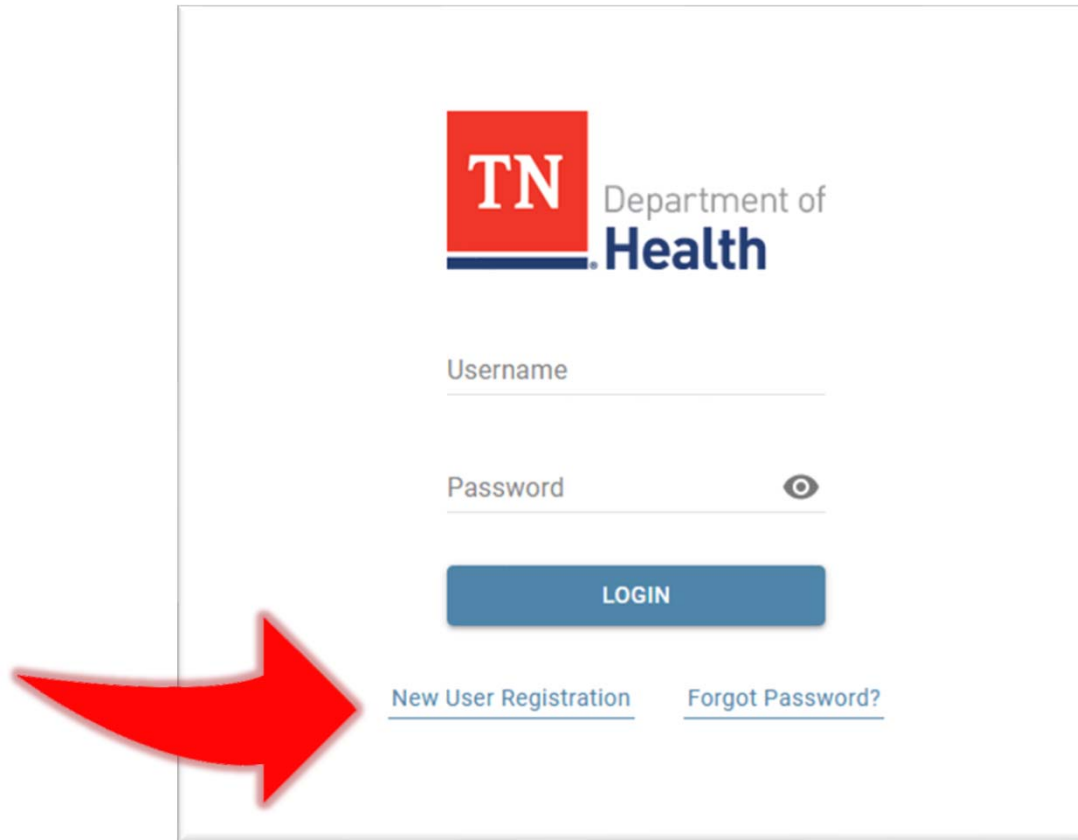
Portal Login Page

- Login Existing Account

- New User Registration

- Reset Password

- Order Support

  – View Lab Contacts

  – Information on where to submit specimens

- Technical Support

  – Technical Support Contacts

Department of Health
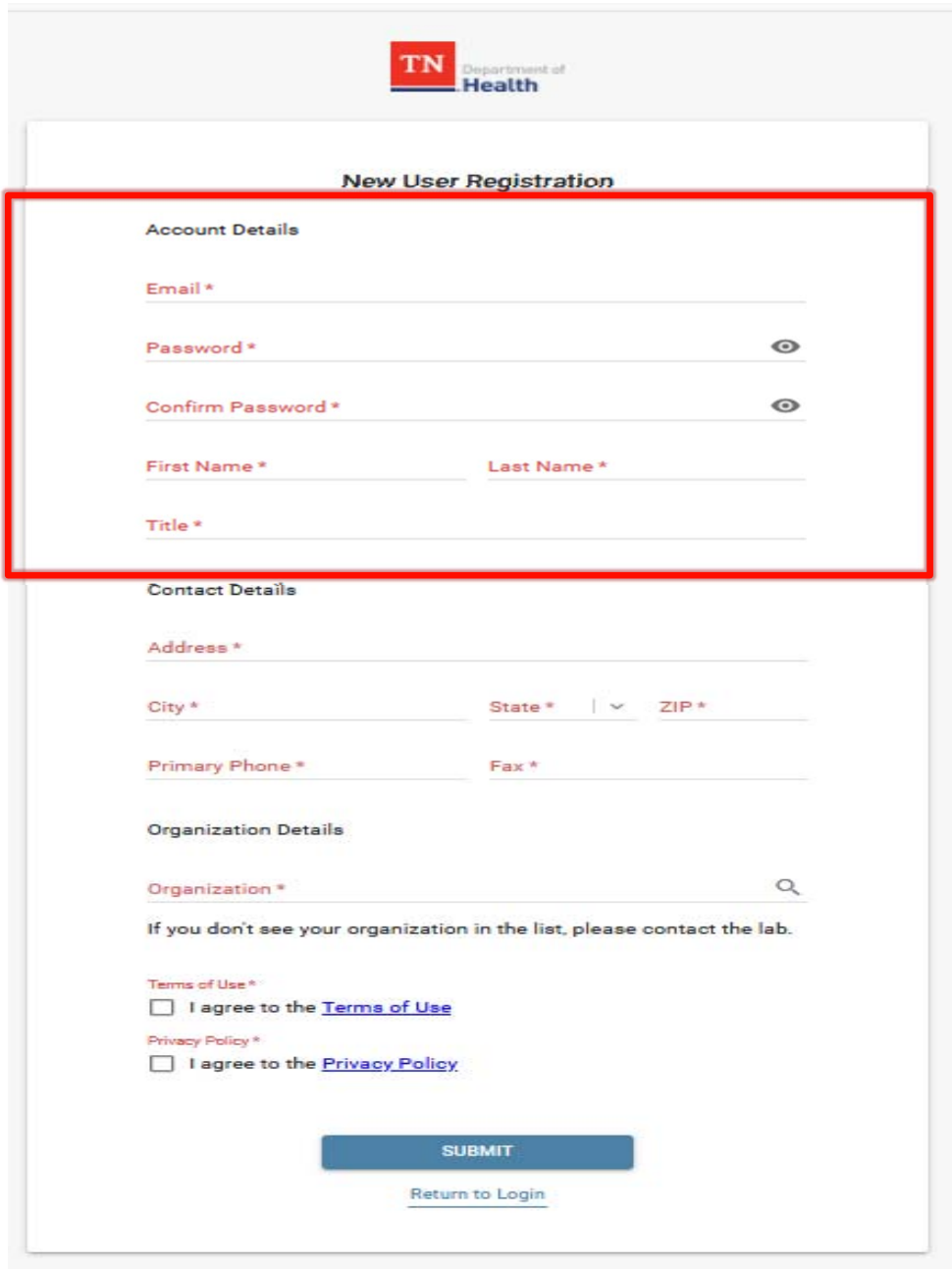
New User Registration

- Click "New User Registration"

New User Registration

Account Details

- Email address (username)

- Password

- Confirm Password

- Name (First and Last)

- Title

New User Registration

Contact Details

- Facility Address

- Primary phone

- Fax number

New User Registration

Organization Details

- Begin typing the name of your facility in the "Organization" field

- Facilities in the portal will be listed

  - Select your facility from the list

  - Multiple facilities?

    - Contact Technical Support

New User Registration

Review "Term of Use" and "Privacy Policy"

- Check the boxes to agree

- Agreement is required to request access

New User Registration

<u>Click Submit to complete the registration process</u>

- New user request will be sent to the portal admin for approval

- All user requests will be verified with facility supervisory staff

- Users will be notified by email upon approval
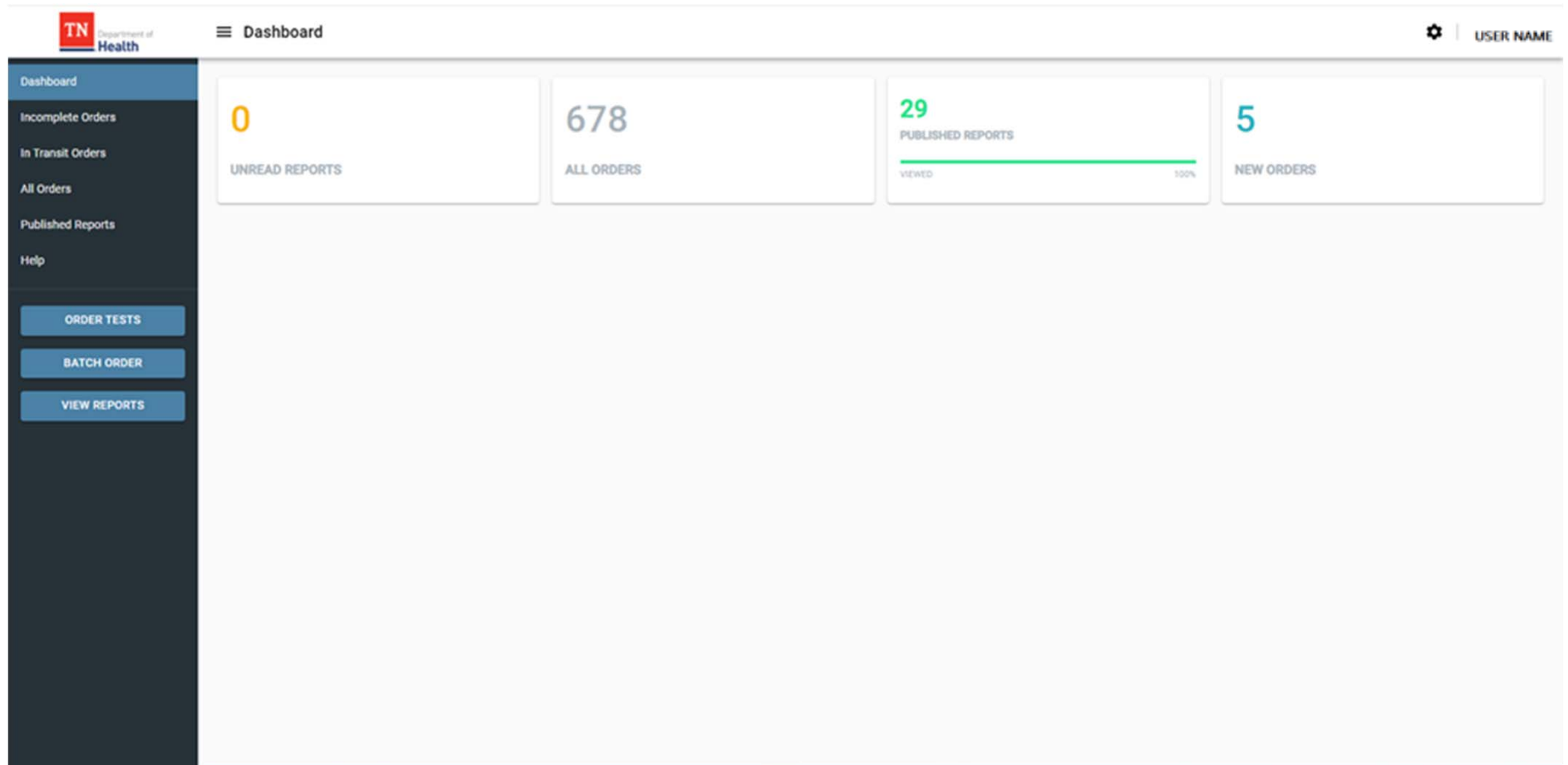
  - Please allow 24 hours for account review

Navigating the Lab Web Portal

Dashboard

- Landing page after log in
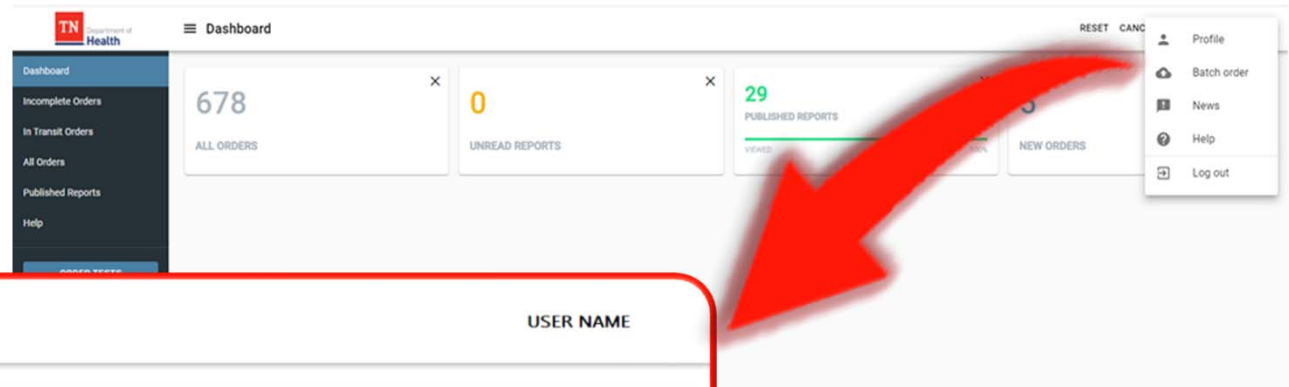- Control center of the LWP

Dashboard -Tiles

- Displays counters and key performance indicators
    - Top Number = total number for user organization
    - Progress bar = viewed vs not viewed reports
- Click on the tile to open relevant data grids

Editable: Click on the gear ⚙ icon to edit

User Drop-Down Menu - Profile

- Click on your username to access the drop-down menu to edit your personal information

- Click the "Change Password" tab to change your password

User Drop-Down Menu – Manage Notifications

Add personal preferences for Portal notification events by clicking
ADD NOTIFICATION under the Manage Notifications tab

User Drop-Down Menu – Manage Notifications

- Click "Enabled" to be notified when a new report is available
  - Choose to be notified immediately or once per day
  - Save the settings

- To delete a notification, click the 🗑 icon next to the notification

Dashboard - Navigation Panel

Collapse the Navigation Panel by clicking the ☰ button

Data Grids

- Incomplete Orders
- In Transit Orders
- All Orders
- Published Reports

NOTE: Not all users will have access to all options

Dashboard – Navigation Panel

Call-To-Action Buttons

- Order Tests

- Batch Orders

- View Reports
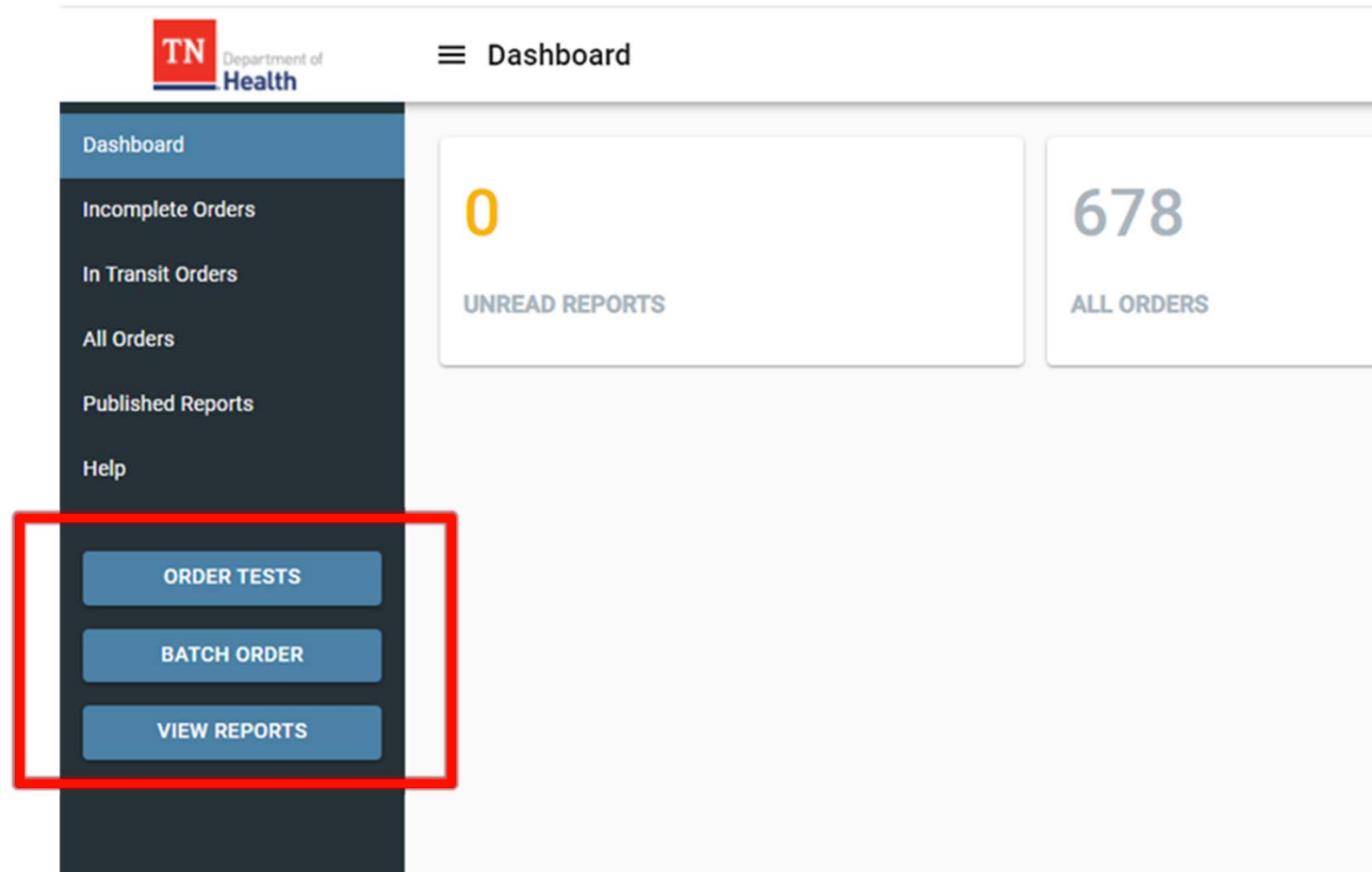
NOTE: Not all users will have access to all options

Help Portal

Using the Data Grids
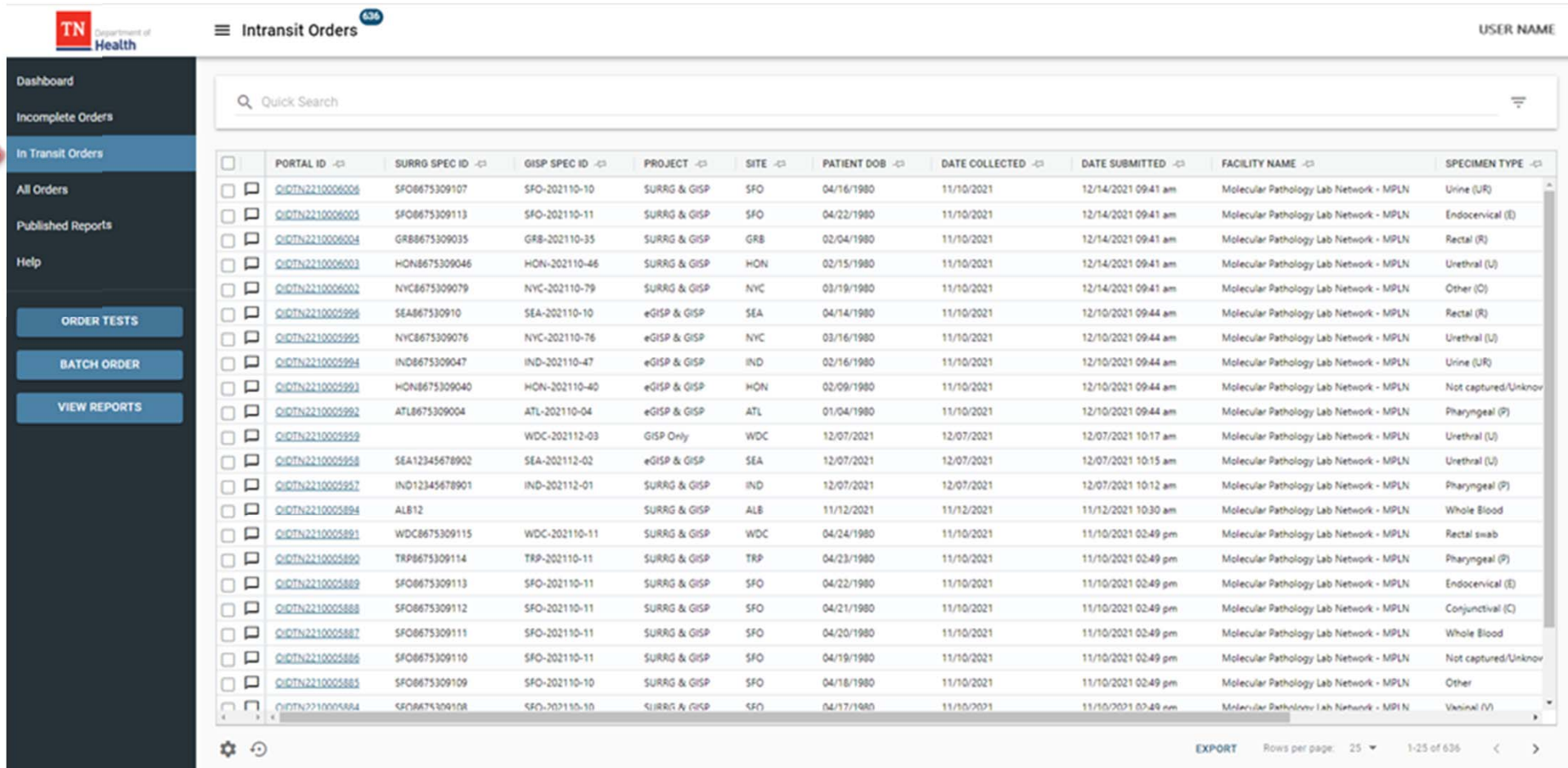
Incomplete Orders

- Lists orders that have been started but not yet submitted

In Transit

- Lists orders that have been submitted, but not yet received by the lab

All Orders

- All orders submitted by user organization, regardless of status

Published Reports

- Shows all orders with published reports per user organization.
  - Orders with unread (not viewed) reports are shown in **bold**

Dashboard - Quick Search

- Click on ☰ button to open filter panel to add additional/advanced search options
  - Available for the different data grids

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

Data Grid Navigation

- Click on the column header to sort the data grid
    - Hold shift and click headers to sort by multiple columns

Quick Search

Refresh Settings

Toggle Column Settings

Export List*
Option not visible unless orders are listed

Data Grid Navigation

Number of items that need attention

Page Navigation

Rows per Page
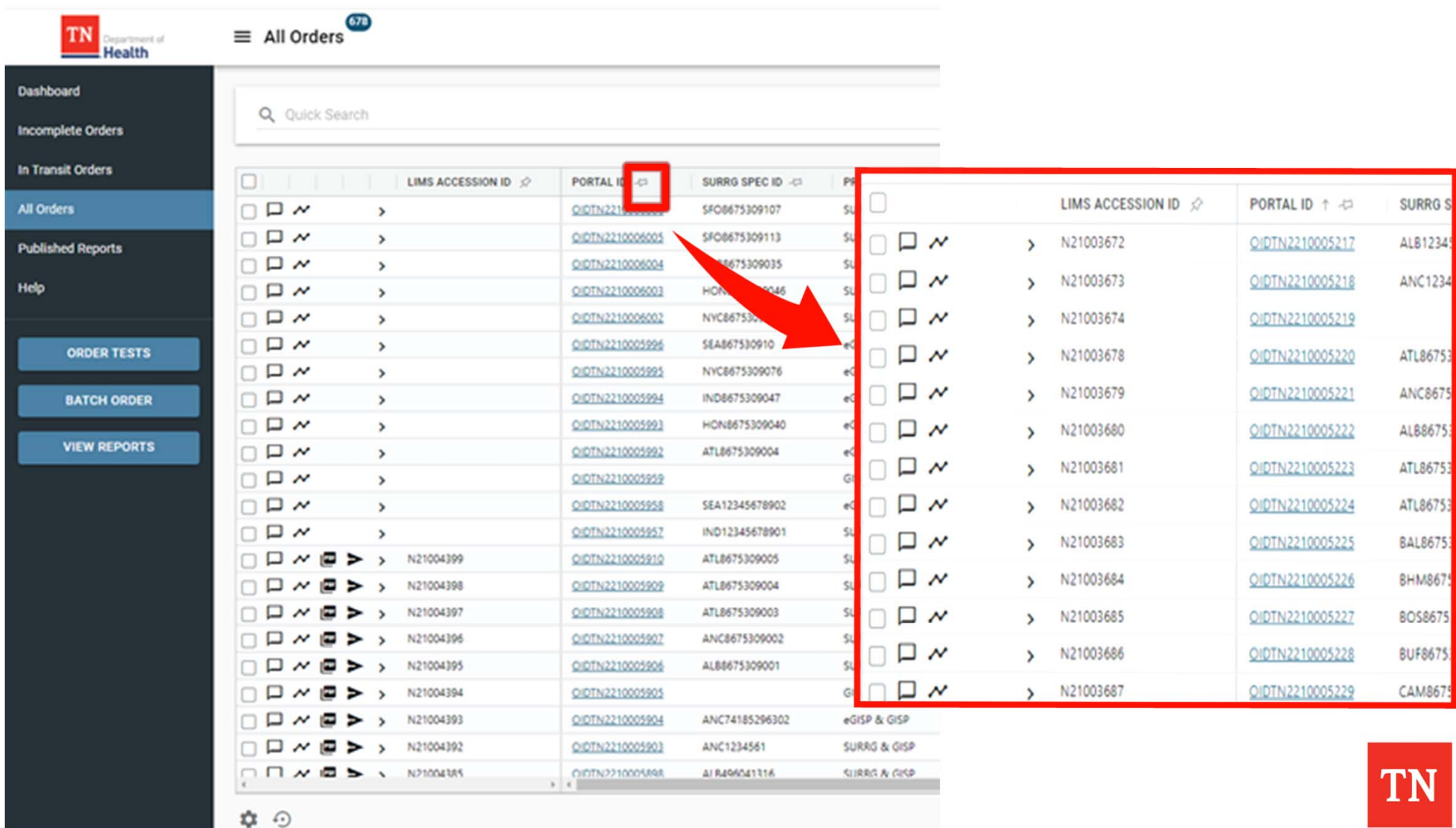
Page Number

Data Grid Navigation

- Click on 📌 icon to pin a column the left side of the grid

Ordering Tests

Ordering Tests

1. Click the **Order Tests** Call-to-Action button

2. Click the **[TN] GC ETOR TRF** tile to access the Test Requisition Form (TRF)

Test Requisition Form (TRF) – Site Information

- Start typing the site name in the **SITE** field
  - Sites will populate in a drop-down menu
  - Choose the site from the drop-down menu

Test Requisition Form (TRF) – Project Name

- Click on the ⌄ to view/select project from the drop-down list

Test Requisition Form (TRF) – Submitter Information SURRG & GISP

- Begin typing the name of the submitting facility in the **SUBMITTING FACILITY NAME** field.
- Click the 🔍 icon to see the list of facilities

Test Requisition Form (TRF) – Submitter Information SURRG & GISP

- Enter the GC Facility Code in the **GC FACILITY CODE** field *– OR-*

- Click the ⌄ icon next to see the list of GC Facility Codes

- Click on the facility code

Test Requisition Form (TRF) – Submitter Information SURRG & GISP

- Enter the SURRG Specimen ID in the **SURRG SPEC ID** field

- Enter the Jurisdiction PHL and GISP Specimen ID, if available

Test Requisition Form (TRF) – Submitter Information eGISP & GISP

- Begin typing the name of the point of contact in the **SUBMITTING FACILITY NAME** field.

- Click the 🔍 icon next to see the list of facilities

- Click on the name of the facility and click **SELECT**

Test Requisition Form (TRF) – Submitter Information eGISP & GISP

- Enter the GC Facility Code in the **GC FACILITY CODE** field.

- Click the ⌄ icon next to the GC Facility code to see the list of GC Facility Codes

- Click on the facility code

Test Requisition Form (TRF) – Submitter Information eGISP & GISP

- Enter the SURRG Specimen ID in the **SURRG SPEC ID** field
- Enter the GISP Specimen ID, if available

Test Requisition Form (TRF) – Submitter Information GISP only

- Begin typing the name of the point of contact in the **SUBMITTING FACILITY NAME** field.
- Click the 🔍 icon next to see the list of facilities
- Click on the name of the facility and click **SELECT**

Test Requisition Form (TRF) – Submitter Information GISP only

- Enter the GC Facility Code in the **GC FACILITY CODE** field.
- Click the ⌄ icon next to the field to see the list of GC Facility Codes
- Click on the name of the facility

Test Requisition Form (TRF) – Submitter Information GISP only

- Enter the GISP Specimen ID in the GISP Spec ID Field.
  - The year and month will be prepopulated

Test Requisition Form (TRF) – Patient Information SURRG & GISP / eGISP & GISP

- Enter the patient's date of birth in the **PATIENT DATE OF BIRTH** field
  - Click the calendar icon to view the calendar to select the date from the calendar instead of typing in the date
- Select the patient's gender by clicking on the radio button next to the patient's gender
- Enter the Patient ID in the **PATIENT ID** field

Test Requisition Form (TRF) – Patient Information GISP only

- Enter the patient's date of birth in the **PATIENT DATE OF BIRTH** field
  - Click the calendar icon to view the calendar to select the date from the calendar instead of typing in the date
- Select the radio button next to the patient's gender

Test Requisition Form (TRF) – Specimen Information SURRG & GISP / eGISP & GISP

- Type the **Collection Date** to enter the collection date -*OR*-
  - Click on the calendar 📅 icon to select the date of collection
  - Click **OK** to save the date/time and to return to the form
- Click the radio button next to the **SPECIMEN TYPE**

Test Requisition Form (TRF) – Specimen Information GISP Only

- Type the **Collection Date** to enter the collection date *-OR-*
  - Click on the calendar 📅 icon to select the date of collection
  - Click **OK** to save the date/time and to return to the form
- Click the radio button next to the **SPECIMEN TYPE**

Test Requisition Form (TRF) – Ask at Order Entry (AOE) Questions SURRG & GISP only

- Select the appropriate radio button next to the Alert or Non-alert under **LAB ETEST INTERPRETATION**

Test Requisition Form (TRF) – Shipping Information

- Select the appropriate radio button next to the Yes or No under **"DO YOU HAVE THE SHIPPING LABEL CREATED"**

Test Requisition Form (TRF) – Shipping Information

- If you selected YES and the shipping label has been created:
  - Enter the tracking label number and date shipped in the corresponding fields
  - Select the appropriate radio buttons for the **SHIPPING PROVIDER** and **SHIPPING CONDITIONS**

Test Requisition Form (TRF)- Submission

- If required fields are not populated or populated incorrectly, an error dialog box will appear to show the missing fields.

The following fields are missing or filled incorrectly:

Facility Name   Last Name

CLOSE
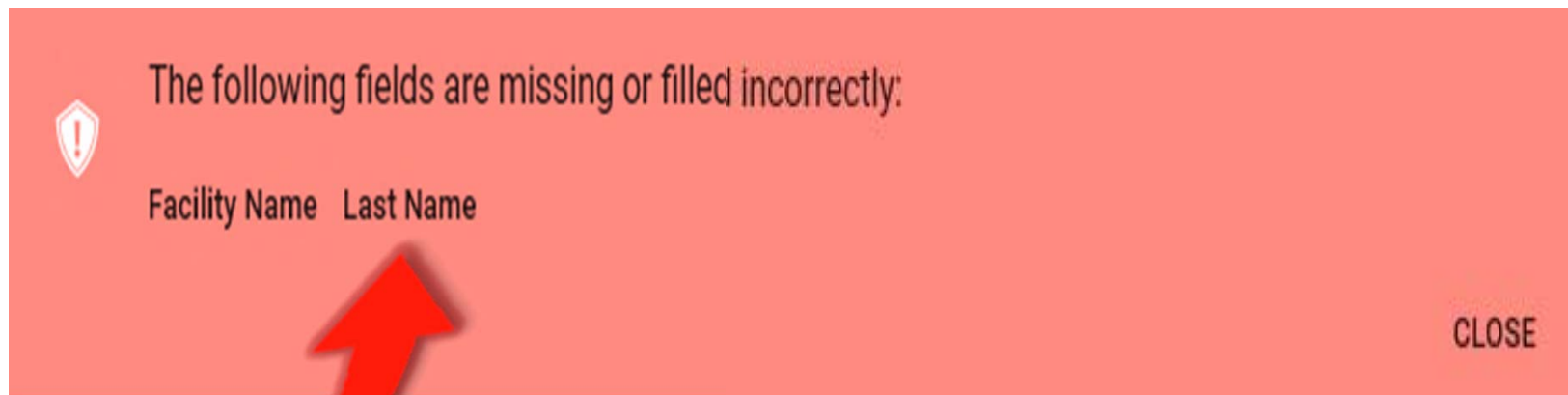
- Click on any field in the dialog box to navigate to the field to correct the issue.

TN Department of **Health**

Test Requisition Form (TRF)-Submission

- Once the test order is ready to be submitted, the Certification of Test Order message will be displayed

- The user must click **AGREE** in order to move forward

Certification of Test Order

By submitting this order for testing, I hereby certify as follows:

- The ordering provider is an individual authorized under State law to order tests or receive test results, or both.
- I certify that the information submitted is true and correct to the best of my knowledge.

CANCEL   AGREE

Test Order Confirmation

- Once the test order has been submitted, the confirmation message will be displayed

- The Portal Order ID identifies the test order in the system

Test Order Confirmation

- Click **PRINT** to print the Order Manifest (PDF)
- A printed copy of the Order Manifest must accompany the specimen to the laboratory

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

- The Order Manifest may be accessed at any time by clicking on the Portal Order ID in the **All Orders** data grid.

TN Department of Health

Order Manifest

A printed copy of the Order Manifest must accompany the specimen to the laboratory

Portal Order ID

Test Order Confirmation

- Click **COPY ORDER** to add more orders for the same facility
  - All information from the current order (excluding patient and insurance information) will be copied

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

Test Order Confirmation

- Click **CLOSE** to display the TRF for the next patient
  - If no additional patients will be entered, navigate back to the dashboard to close the TRF

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

Saving Incomplete Test Orders

- Incomplete test orders may be saved to be completed and submitted later

> **Save order**
>
> Would you like to save this order?
>
> CANCEL   **YES**

- After saving, a confirmation order will be displayed with the Portal Order ID for that specimen
  - Incomplete orders will be accessible in the **Incomplete Orders** data grid

> **Order saved**
>
> Your test order has been saved as **OIDIL200000013** in Incomplete Orders.
>
> CLOSE

TN

Incomplete Orders

Number of Incomplete Orders

- To retrieve the saved order:
  - Navigate to the **Incomplete Orders** navigation link
  - Locate the order record and click on it.
- To discard saved order, click on the 🗑 icon.

Batch Ordering

Batch Orders

- The Batch Order function allows users to upload multiple test orders at once

Batch Orders

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.

4. Save the excel spreadsheet.

5. Open the saved Excel Spreadsheet and fill the required details in the fields.

   Note: the dropdown menus for some of the required values.

- Download the **Import Template** required for the Batch Order **prior** to specimen collection and submission.

- This is important in order to correctly gather the required order fields and patient information.

Batch Import Template

- Enter <u>one line</u> for each specimen that is being submitted.
- <u>ALWAYS</u> download the template for every use

All fields in red are required

Batch Import Template

- Use the drop-down choices in fields where available

Importing Batch Orders

1. Click the **Batch Order** Call-To-Action Button
2. Click **IMPORT FROM FILE**

NOTE: The Import from File option can also accessed by clicking the ⋮ icon on the tile

Importing Batch Orders

3. Click the drop-down arrow and select the appropriate tile
4. Drag & Drop –OR-Search for the Import Template File
5. Click **IMPORT** to upload the file

Importing Batch Orders

- If the required fields are not completed in the Batch Import Template before uploading, the user will receive an error message.

- Click on the 🔴 icon beside each to view the details of the error(s)

Importing Batch Orders

- The errors must be corrected before submitting the Batch Order
  - Manually correct the errors for each line

OR

  - Delete the uploaded entries, correct the spreadsheet, and re-upload the file

Importing Batch Orders

- Once all entries are ready to submit, click **SUBMIT** in the bottom right corner
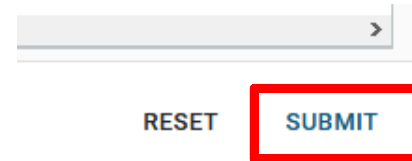
- If errors exist when submitting, a warning will be displayed

Invalid Data

There are no valid records in the grid. Please correct data and try again.

CLOSE

- After closing the warning, the ⊙ icon will be displayed next to the entry with errors
  - The fields with errors will be highlighted in red

Printing
Shipping Manifests
or Requisitions

GC Shipping Manifest

- Navigate to the **In Transit** or **All Orders** Data Grids

GC Shipping Manifest
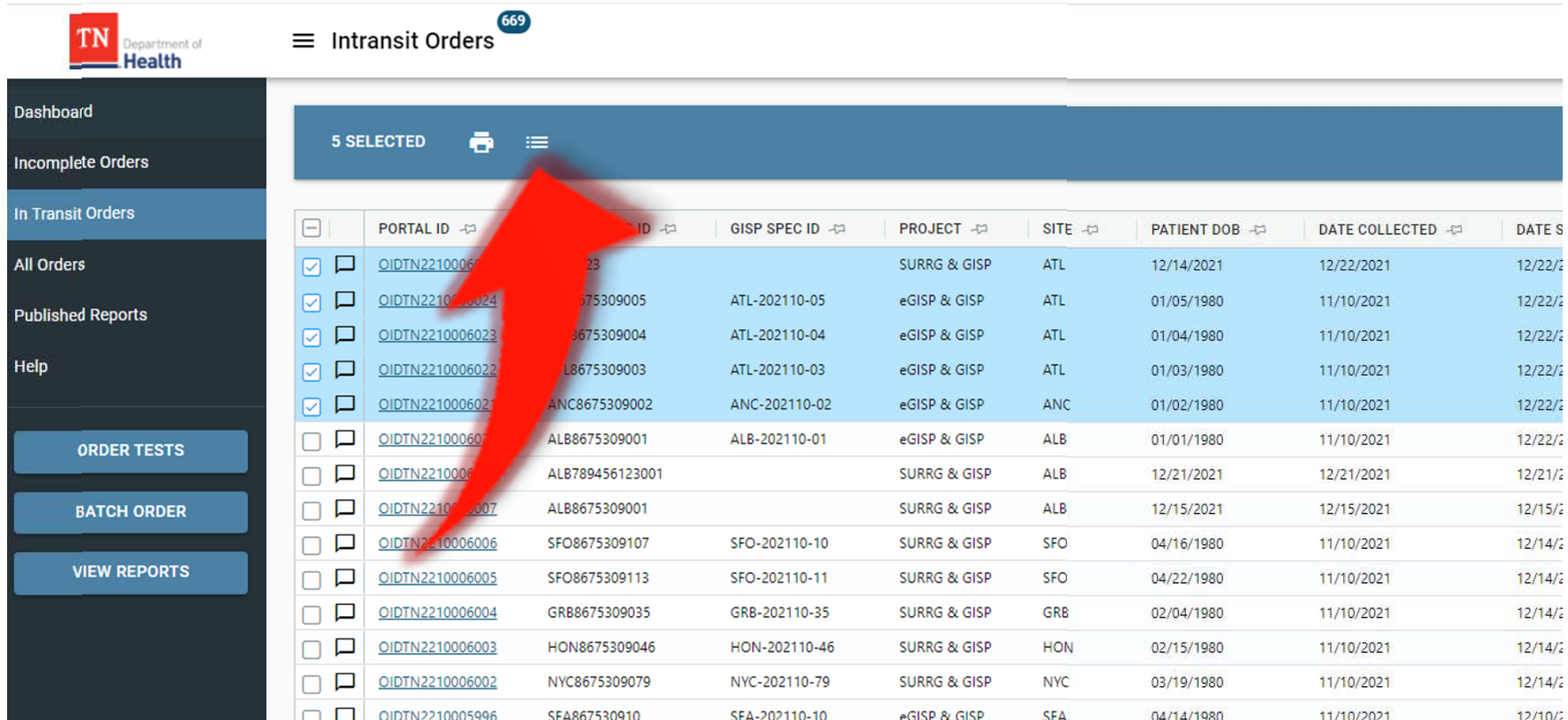
- Click the checkbox beside the order(s) you wish to ship

GC Shipping Manifest

- A blue bar will appear above the grid

- Click the ▤ icon to generate the GC Shipping Manifest

GC Shipping Manifest

- The generated GC Shipping Manifest will match the orders selected from the Data Grid

- **Print a copy of the GC Shipping Manifest and include with the shipment**

Printing Order Requisitions
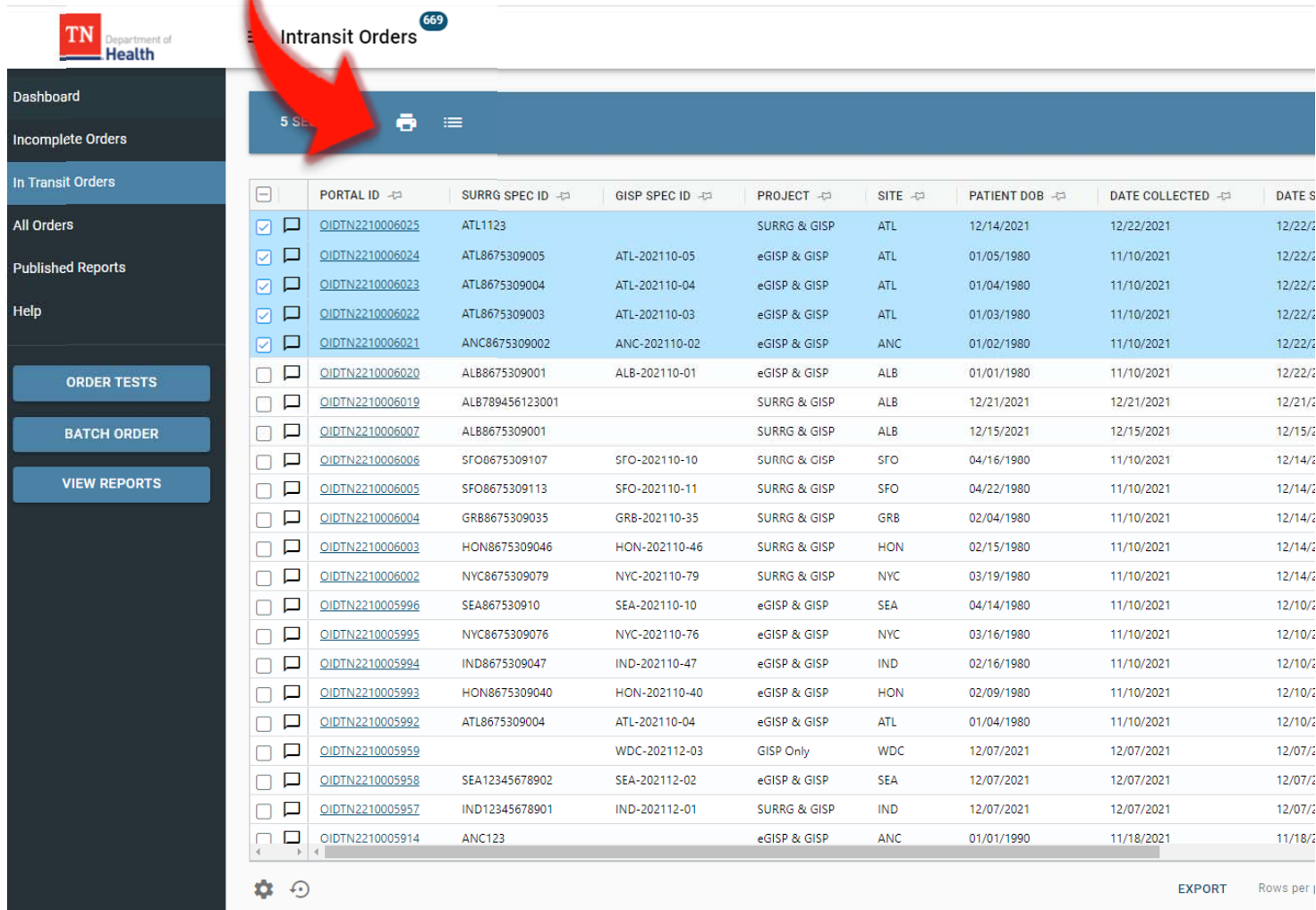
- Click the checkbox beside the order(s) for which you wish to print requisitions

Printing Order Requisitions

- Click the 🖨 icon to print the requisitions for the selected orders

Printing Order Requisitions

- The selected order requisitions will download in a single PDF file

Cancelling Orders

- If an order has been placed with errors in the data, highlight the orders to be canceled in the In Transit module.
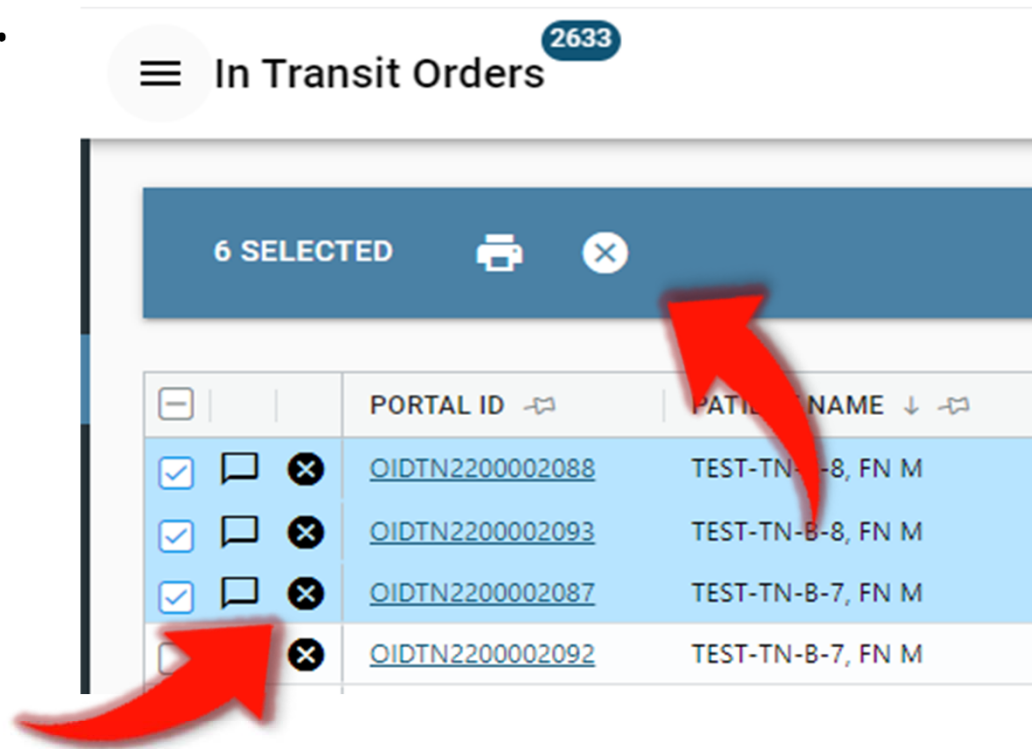
- Click the ⊗ button available in the blue ribbon or at the individual orders.
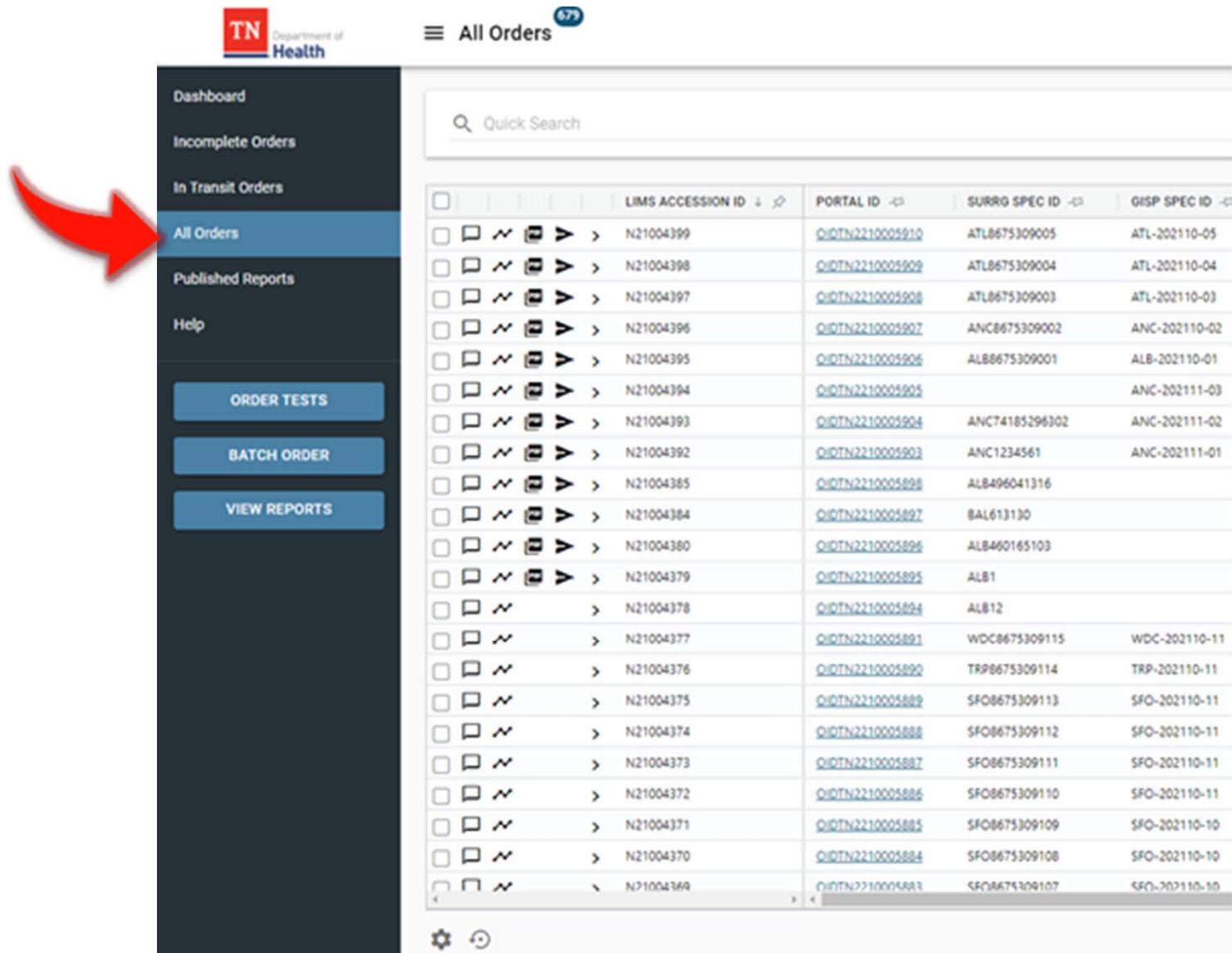
Accessing Orders, Reports, and Patients

Tracking Order Status

- To see a status of your test order, open **All Orders** grid

Tracking Order Status

- **Status** column:
  - **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

Tracking Order Status

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

View or Add Comments
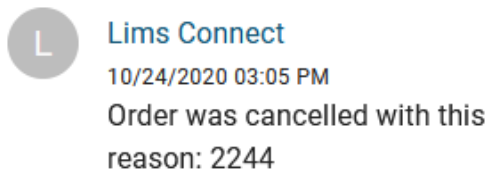
- Click on the 🗩 icon to view comments for a specimen

- Enter comments by typing into the comment box

- Orders with existing comments will show a number in the 🗩 icon

Viewing Reports

- To view new (i.e. unread) published reports, click **VIEW REPORTS** button
- Unviewed reports will be in **bold** text

- Click on the PDF icon to download the report.

Discrete Result Values Data Grid Drop Down

- Click on the ➤ icon to open the Discrete Result Values Data Grid Drop Down

Downloading Reports

- After clicking the ▣ icon, a dialog box will open
- Unopened reports will have a 🟥NEW and no checkmark ✅ inside the green circle.
  - The type of the report (Final, etc.) will be displayed as a part of the PDF name.
- Once report has been viewed, the order disappears from the View Reports grid and moves to the **Published Reports** grid

Downloading Reports

- Latest report always appears on top
- Click the ⟲ icon to open the report history
  - Provides an audit trail of all actions taken on the report

Downloading Multiple Reports

- Click the checkbox beside the reports you wish to download
- A blue bar will appear above the grid

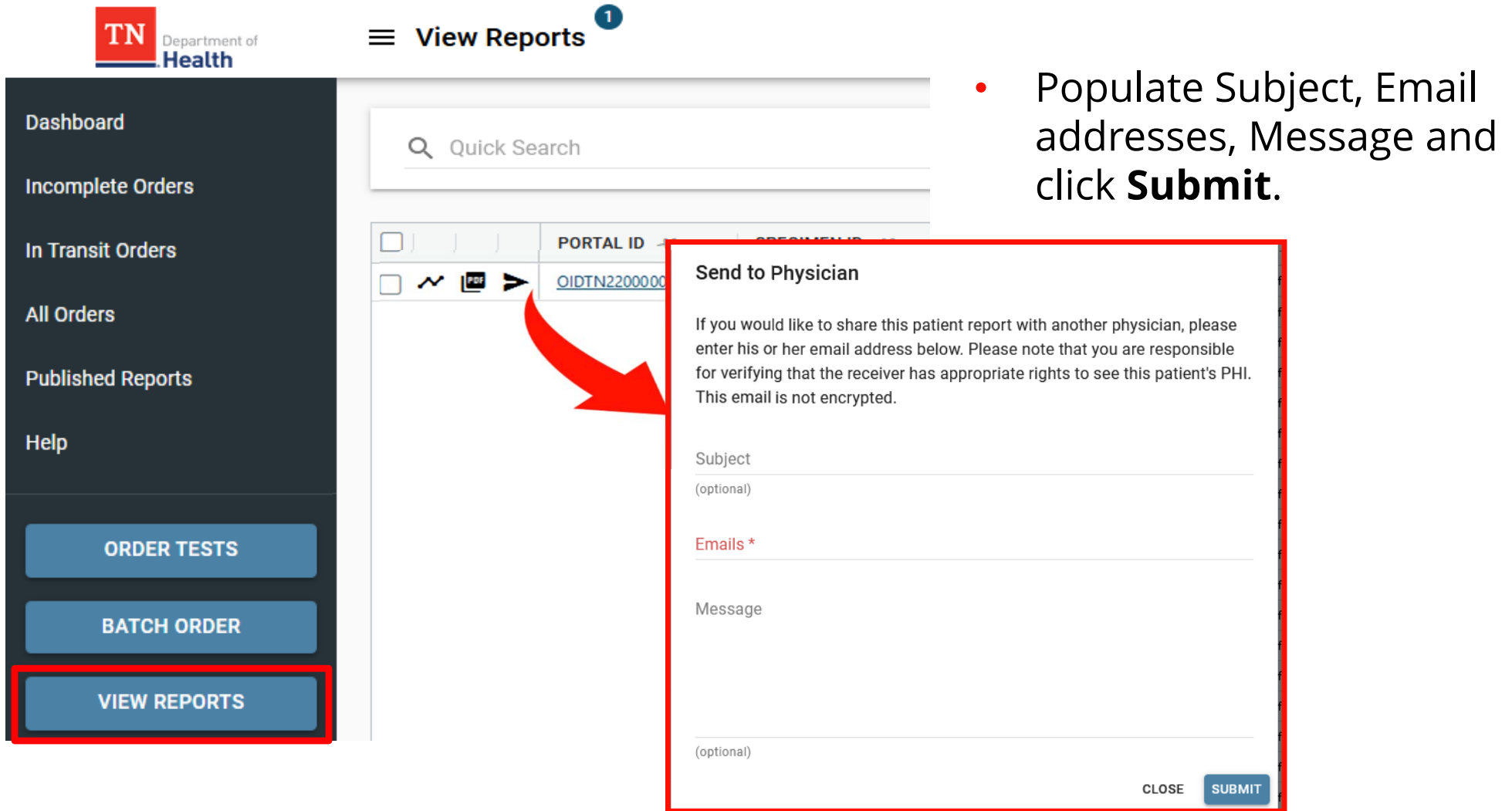- Click the download ⬇ icon to download multiple reports
- The selected reports will download in a single PDF file

Sending Reports

- Click on the ➤ icon to send a report to the provider

- Populate Subject, Email addresses, Message and click **Submit**.

Note: Recipient will get temporary access to the portal to download the shared report

Sending Multiple Reports

- Navigate to the **Published Reports** page
- Select the checkboxes for the patients you wish to send
- Click the ▷ icon in the blue bar to send multiple reports to the provider