NO PATIENT DATA WAS USED IN THIS PRESENTATION.

ALL “PATIENT” INFORMATION HAS BEEN FABRICATED FOR TRAINING PURPOSES.
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
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

Click Submit to complete the registration process

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

Click the “Change Password” tab to change your password.
Add personal preferences for Portal notification events by clicking “Add Notification”
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 deletion icon next to the notification
Dashboard - Navigation Panel

Data Grids

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

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
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**
My Patients

- Shows your patients’ list
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
Data Grid Navigation

Number of items that need attention

Rows per Page

Page Navigation

Page Number
• Click on icon to pin a column the left side of the grid
Ordering Tests

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

2. Click the **[TN] COVID 19** tile to access the Test Requisition Form (TRF)
- Type the patient’s last name in the **Last Name** field
- Patients with that last name will populate in a drop-down menu
- Confirm the patient’s date of birth with your patient’s information
• If the patient is listed, click on the patient to add the patient’s information to the TRF
• For more detailed look up, click the search icon
• Edit existing patient information by clicking the ✍️ icon in the Last Name field
Detailed information for all patients, click the search icon.
Once you confirm a patient is not in the system, click **ADD** in the details box or by clicking the + icon on the TRF page to add a new patient.
• Enter the patient information
  • Items in red are required
• Click **Submit** to add to the system and into the TRF form
If you are affiliated with more than one facility:

- Click the search icon next to the **Facility Name** field to list facilities affiliated with your user account
- Click on the name of the facility and click **SELECT**
Begin typing the name of the point of contact in the **Point of Contact** field.

Click the 🕵️‍♂️ icon next to see the list of contacts affiliated with your facility(s)

Click on the name of the contact and click **SELECT**
• Begin typing the name of the provider in the **Ordering Provider** field
  • If the ordering physician is listed, select the physician’s name from the list
  • The provider’s information will populate in the TRF
  • Verify the provider’s information on the form
To edit the provider information, click the ✒️ icon after selecting the provider’s name from the list.
• If the provider is not listed, add the provider by clicking the + icon
• Add the provider’s information and click Submit
• Type the **Collection Date** and **Time** -OR-
• Click on the calendar 📅 icon to select the date of collection
  • Click on the time at the top, then move the hands of the clock to chose the collection hour and minute
• Click **OK** to save the date/time and to return to the form
Select the **Test** to be performed by clicking on the radio button.

Then click the radio button next to the **Specimen Type** collected.
Test Requisition Form (TRF) – Specimen Information

- Enter the Outbreak/Event ID and PUI ID, if applicable.
Test Requisition Form (TRF) – Specimen Information

- Choose the Laboratory* that the specimen will be sent to by clicking on the Laboratory Name field
- Enter any additional comments in the Comments field
- Click Submit to submit the Test Requisition Form

*CRITICALLY IMPORTANT:
- The specimen MUST be sent to the laboratory chosen.
- Specimens sent to the wrong laboratory MUST be corrected by the facility and will result in delayed testing.
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.

• Click on any field in the dialog box to be navigate to the field to correct the issue.
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.
Answer each of the AOE questions to complete the order request, then click **SUBMIT**.
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.

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.
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

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

A printed copy of the Order Manifest must accompany the specimen to the laboratory.
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.
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.
Saving Incomplete Test Orders

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

- 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

**Save order**

Would you like to save this order?

**Order saved**

Your test order has been saved as **OIDI200000013** in 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 Orders**

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

- 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.

**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.
Batch Import Template

• Enter one line for each specimen that is being submitted.

• Requirements of the **Batch Import Template**:
  
  o All fields in **red** are required
  
  o **ALWAYS** download the template for every use
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 be accessed by clicking the icon on the [TN] Covid Tile.
Importing Batch Orders

3. Click the drop-down arrow and select [TN] Covid
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.

Warning

Some records were imported with errors. Hover over the ( icon) on the left of the record to view the details. Please correct the errors by populating the missing fields in the grid or delete and reimport the corrected record from spreadsheet.

- 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.

- After closing the warning, the ⚠ icon will be displayed next to the entry with errors.
  - The fields with errors will be highlighted in red.
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
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 📄 icon to download the report.
After clicking the icon, a dialog box will open

Unopened reports will have a 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
• Click on **My Patients** link in the navigation bar to access your patients

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

- Click on the patient in the data grid to view patient demographics

To edit patient demographics, click **EDIT**
View Patient Orders

- From the Patient Demographic page, click on the ORDERS tab to view all orders for the selected patient.