Lab Web Portal (LWP)

GC Quick Start Guide

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Edition 1.3.

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

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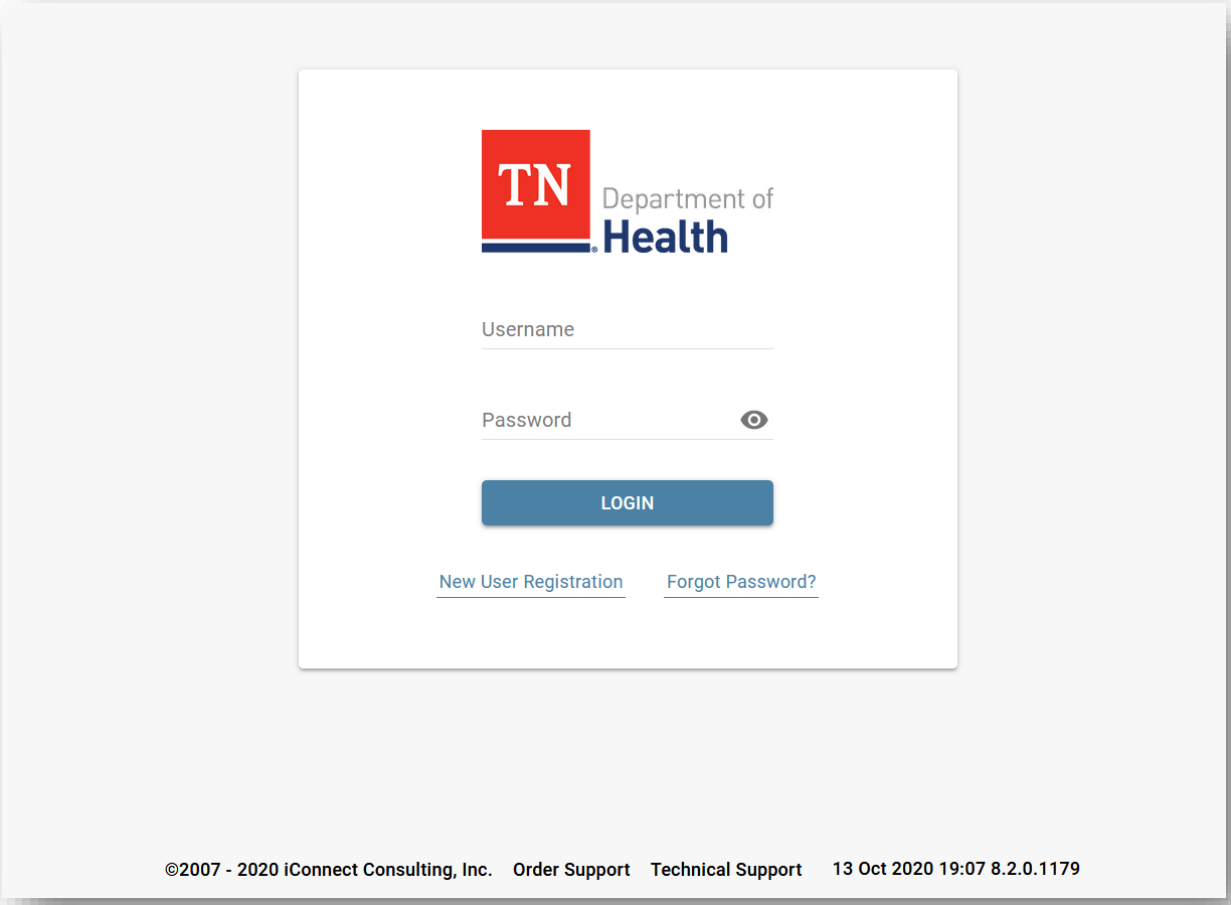
Welcome to Lab Web Portal (LWP)

The Production URL

Access the Portal login page by using the following URL:

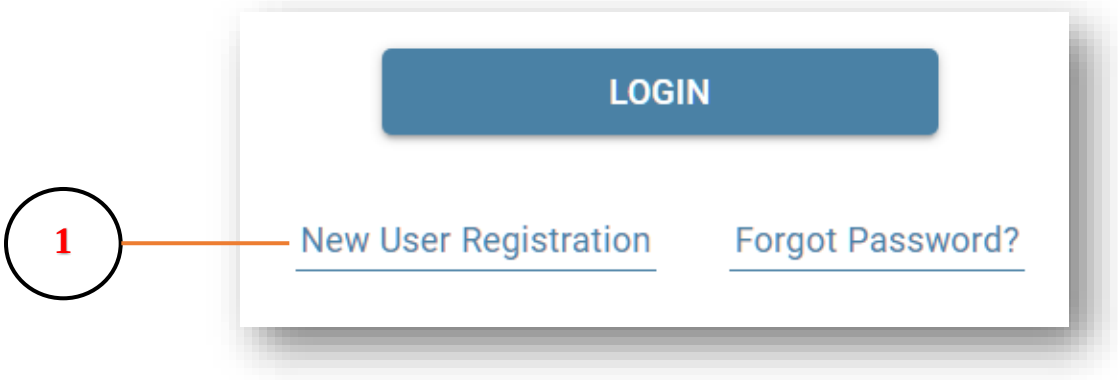
https://lwp-web.aimsplatform.com/tn2/#/



- 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.

TN Department of Health

New User Registration

Account Details

Email *

Password *

Confirm Password *

First Name * Last Name *

Title *

Contact Details

Address *

City * State * ZIP *

Primary Phone * Fax *

Organization Details

Organization *

If you don't see your organization in the list, please contact the lab.

Terms of Use *

☐ I agree to the Terms of Use

Privacy Policy *

☐ I agree to the Privacy Policy

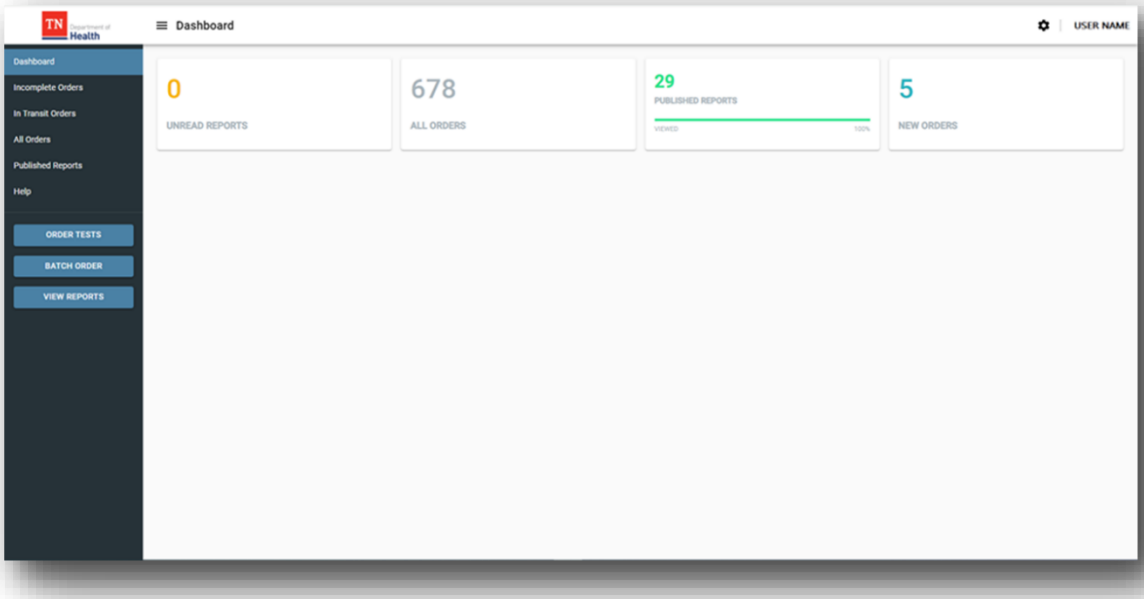
SUBMIT

Return to Login

2

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 ⚙ 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

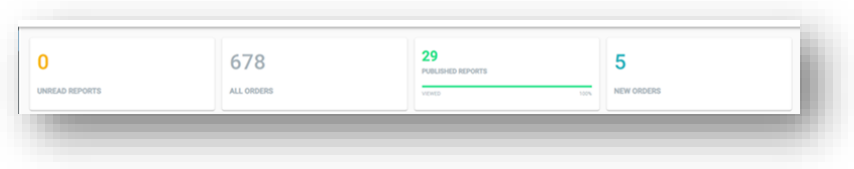
There are 3 blue buttons on the bottom left side of the Navigation Panel.

- **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.

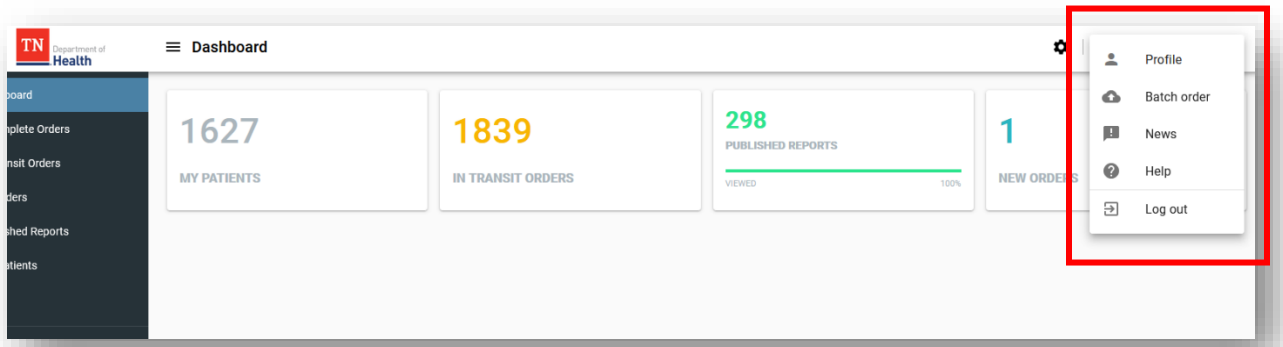
- Click to open relevant data grids.
- Number on top indicates total number of published reports for user organization.



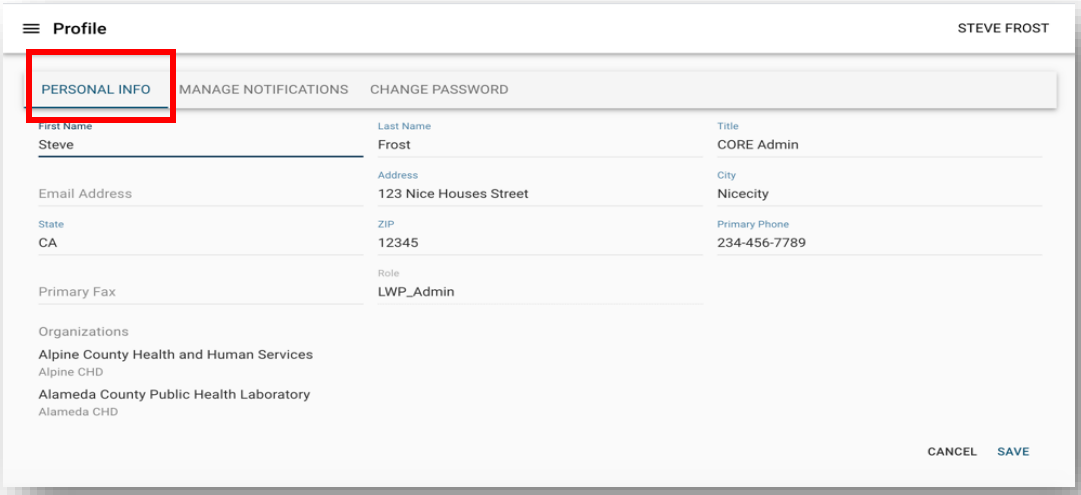
- Progress bar indicates percentage of the “viewed” reports vs. “not viewed.”

User Drop-Down Menu - Profile

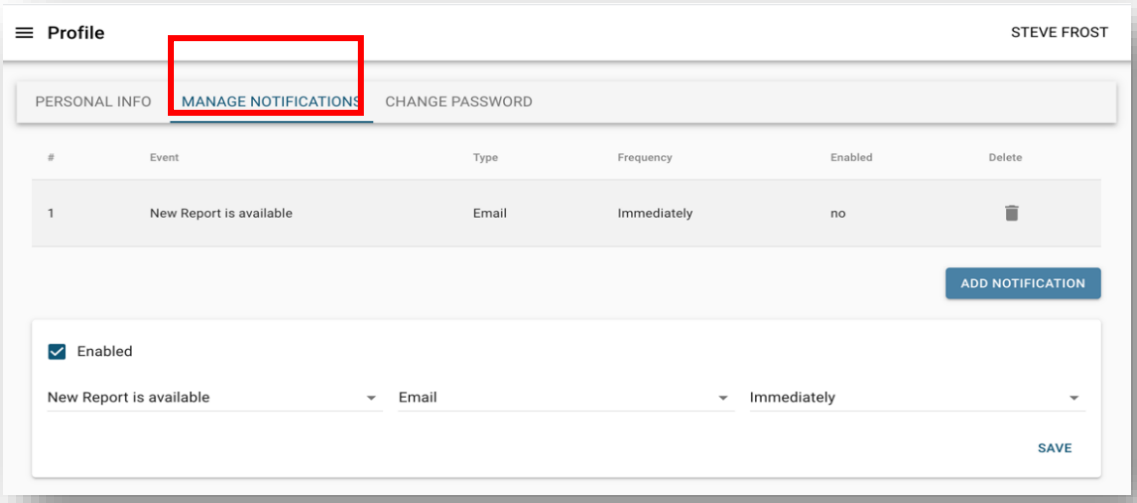
The drop-down menu on the upper right corner offers additional resources.



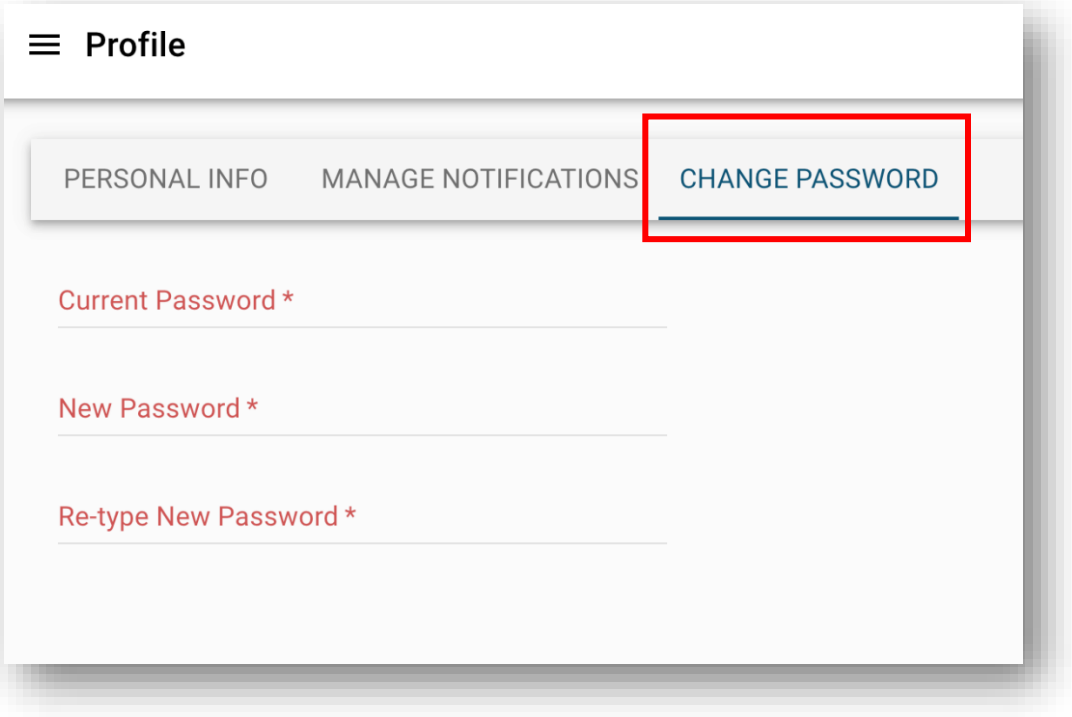
- **Personal Info** – view and edit your personal information



- **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

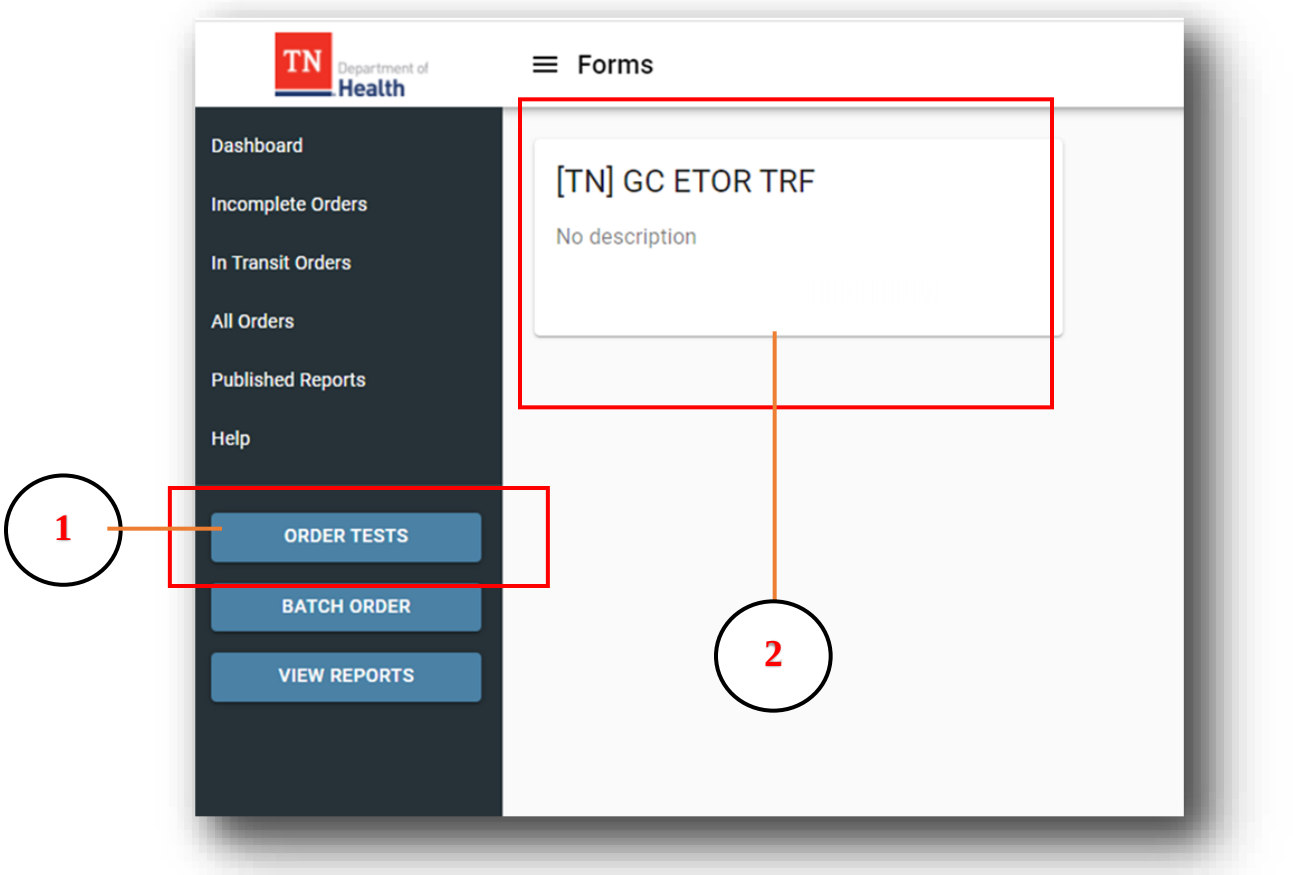
3

Order Tests

Test Requisition Form (TRF)

- Click **ORDER TESTS** Call-to-Action button and choose the “[TN] GC ETOR TRF” Assay Tile form to order tests;

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

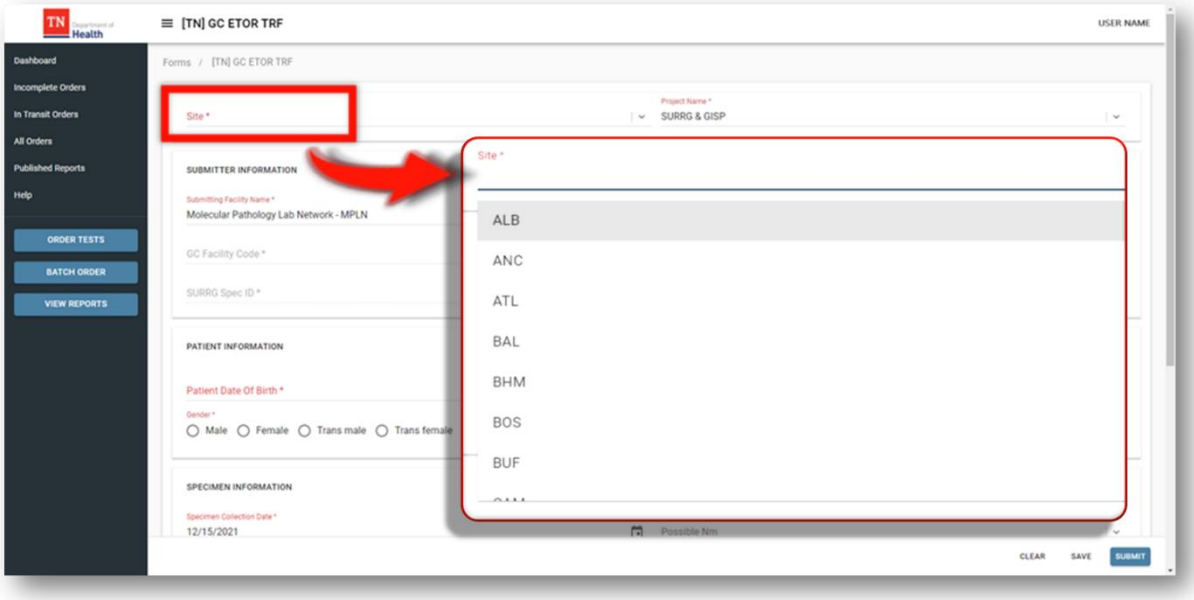


- Find the tile to the right of the Navigation Panel. Click on the “[TN] GC ETOR TRF” Assay Tile to open TRF;

Site Information Section (TRF)

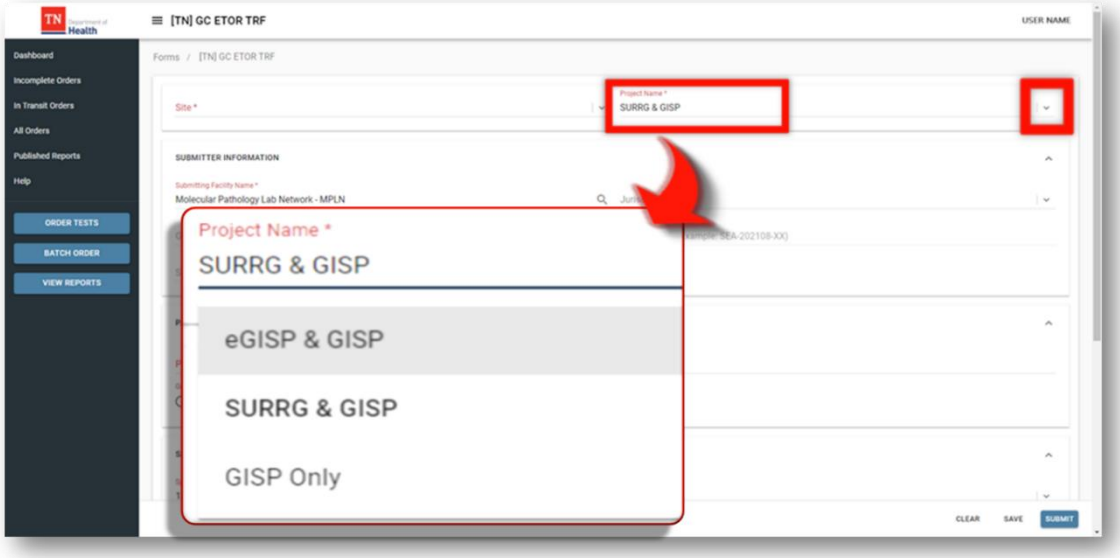
Note: The fields that are required are indicated in red with an asterisk.

- Start typing the site name in “SITE” field to display a drop-menu
- Choose the site from the drop-down menu



Project Information Section (TRF)

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



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

Submitter Information Section (TRF)

For SURRG & GISP:

Submitting Facility Name:

- Begin typing the name of the submitting facility in the “Submitting Facility Name” field.
- Click the icon to see the list of facilities
- Click on the appropriate Facility Name.

GC Facility Code:

- Enter the GC Facility Code in the “GC Facility Code” field – OR- .
- Click the icon to see the list of GC Facility Codes.
- Click on the appropriate facility code and click SELECT.

SURRG Specimen ID:

- Enter the SURRG Specimen ID in the “SURRG SPEC ID” field.

Jurisdiction PHL/GISP Specimen ID

- Enter the Jurisdiction PHL in the “Jurisdiction PHL” field and/or the GISP. Specimen ID in the “GISP Specimen ID” field, if available.

For eGISP & GISP:

Submitting Facility Name:

- Begin typing the name of the submitting facility in the “Submitting Facility Name” field.
- Click the icon to see the list of facilities.
- Click on the appropriate Facility Name and click SELECT.

GC Facility Code:

- Enter the GC Facility Code in the “GC Facility Code” field – OR-
- Click the icon to see the list of GC Facility Codes.
- Click on the appropriate facility code.

SURRG Specimen ID:

- Enter the SURRG Specimen ID in the “SURRG SPEC ID” field.

GISP Specimen ID

- Enter the GISP Specimen ID in the “ GISP Specimen ID” field, if available

For GISP only:

Submitting Facility Name:

- Begin typing the name of the submitting facility in the “Submitting Facility Name” field.
- Click the icon to see the list of facilities
- Click on the appropriate Facility Name

GC Facility Code:

- Enter the GC Facility Code in the “GC Facility Code” field – OR-
- Click the icon to see the list of GC Facility Codes.
- Click on the appropriate facility code and click SELECT.

GISP Specimen ID:

- Enter the GISP Specimen ID in the “GISP SPEC ID” field – OR- .
- The Month and Year will prepopulate in the field.

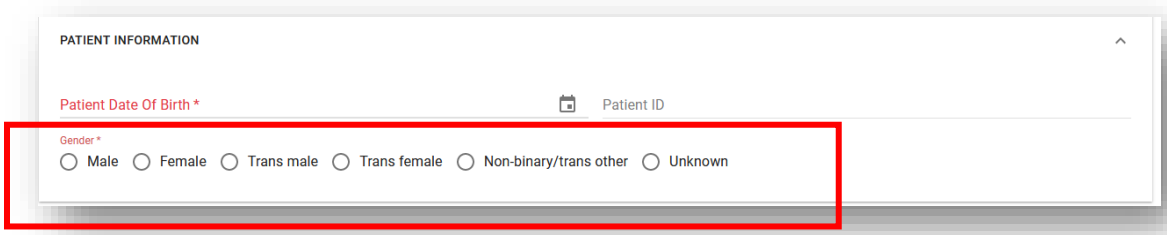
Patient Information Section (TRF)

For SURRG & GISP / eGISP & GISP

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

- Type the patient’s date of birth in “Patient Date of Birth” field – OR-
- Click on the calendar icon to open the calendar to select the date of birth.

- Select the patient’s gender by clicking on the radio button next to the patient’s gender**.**



- Enter the patient ID, if available.

For GISP only

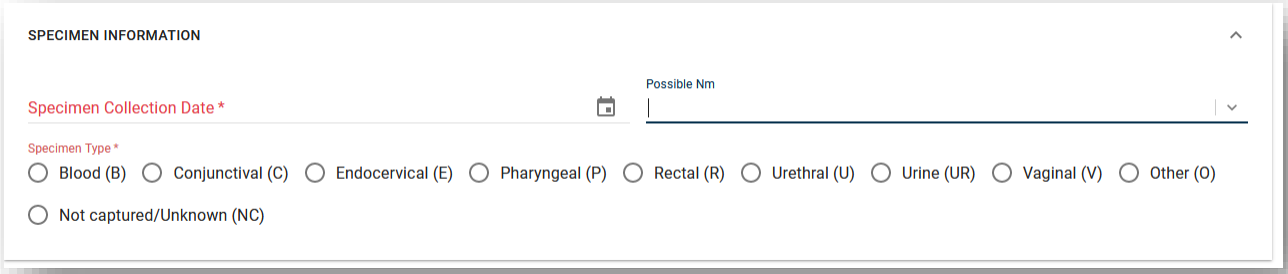
Note: The fields that are required are indicated in red with an asterisk.

- Type the patient's date of birth in "Patient Date of Birth" field – OR-
- Click on the calendar icon to open the calendar to select the date of birth.
- Select the patient's gender by clicking on the radio button next to the patient's gender**.**

Specimen Information Section (TRF)

SURRG & GISP / eGISP & GISP

- Choose the **Specimen Collection Date** from Calendar icon or type the desired date and time.
- Select **Specimen Type** by clicking the radio button beside the specimen type



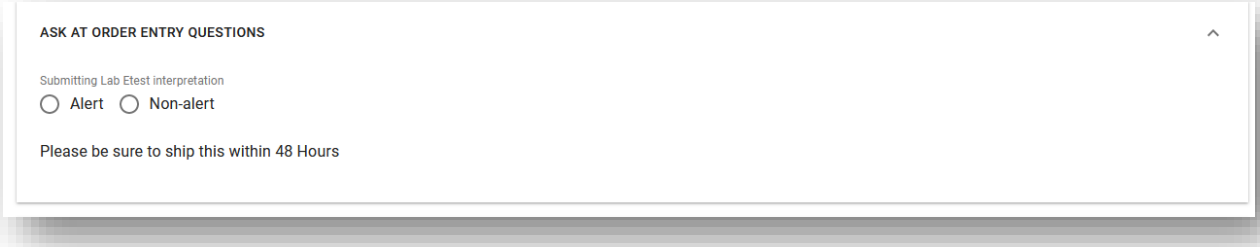
GISP Only

- Choose the **Specimen Collection Date** from Calendar icon or type the desired date and time.
- Select **Specimen Type** by clicking the radio button beside the specimen type.

Ask At Order Entry (AOE) Questions (TRF)

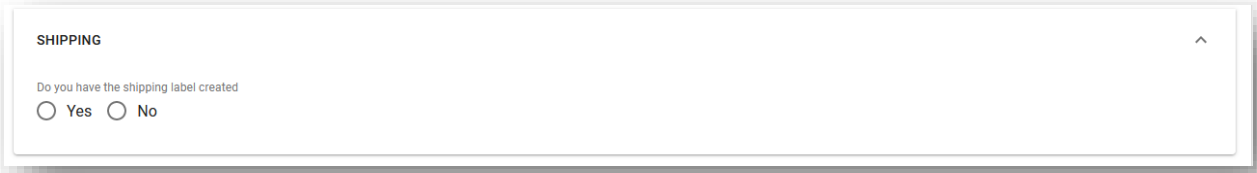
SURRG & GISP Only

- Select the appropriate radio button next to Alert or Non-alert under Lab ETEST Interpretation.

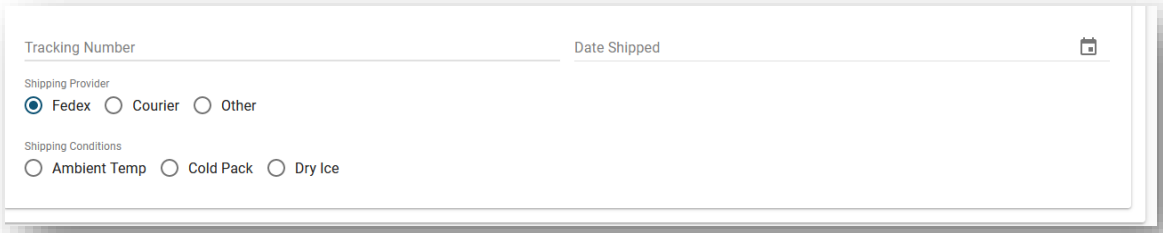


Shipping Information (TRF)

- Select the appropriate radio button next to YES or NO under “Do You Have the Shipping Label Created prompt.

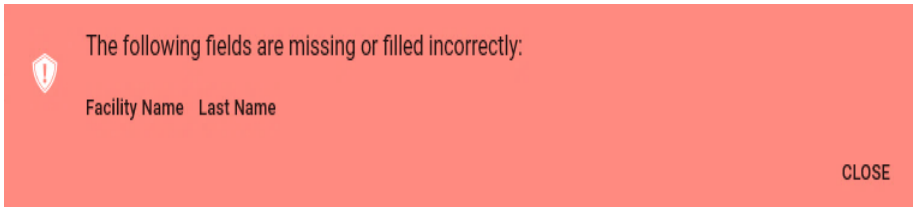


- If you selected YES and the shipping label has been created:
    - Enter the tracking label number and date shipped in the corresponding fields
    - Select the appropriate radio buttons for the **SHIPPING PROVIDER** and **SHIPPING CONDITIONS**



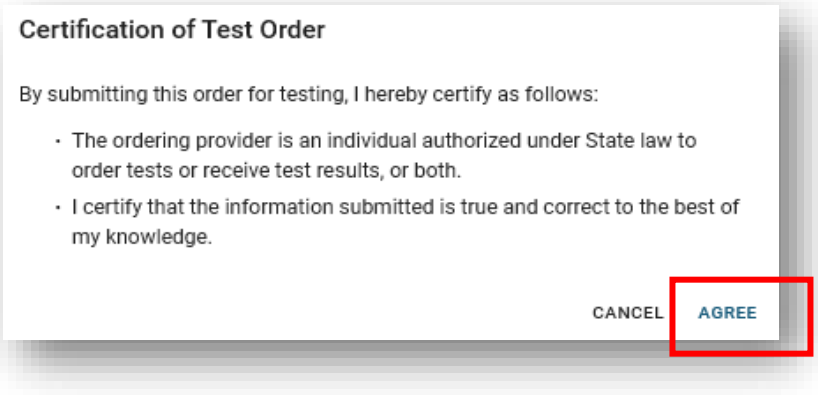
Test Requisition Information (TRF)

- If required field 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 navigate to the field to correct the issue.



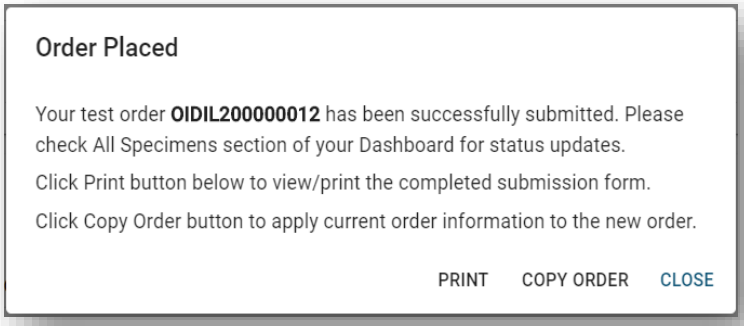
- Once the test order is ready to be submitted, the Certification of Test Order message will be displayed.

- The user must agree in order to move forward.



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.



- Click **Print** button to print the Order Manifest in a pdf format.

N**ote**: The barcode in the upper right corner represents the Portal Order ID.

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.

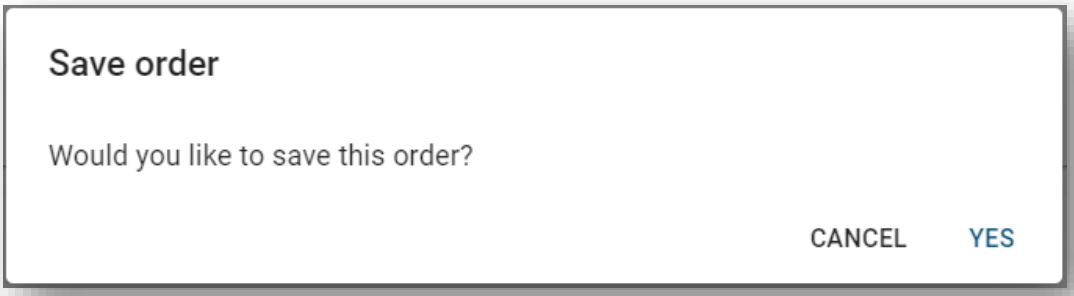
The Order Manifest can be accessed at any point by clicking on the value under Portal Id column in the **All Orders** data grid.

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.

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.

4

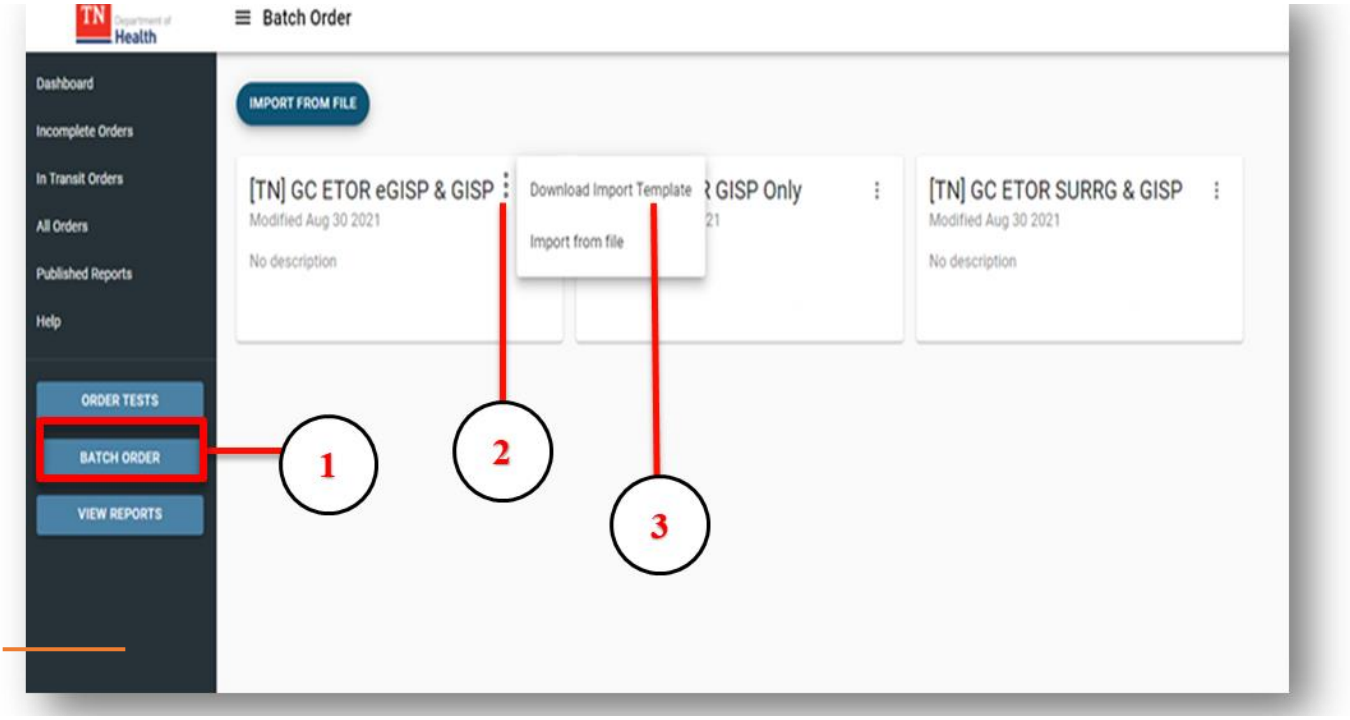
Batch Order

Upload multiple test orders at once.

Download the **Import Template** that has all the required fields and response options required for the Batch Order **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. Save the excel spreadsheet.

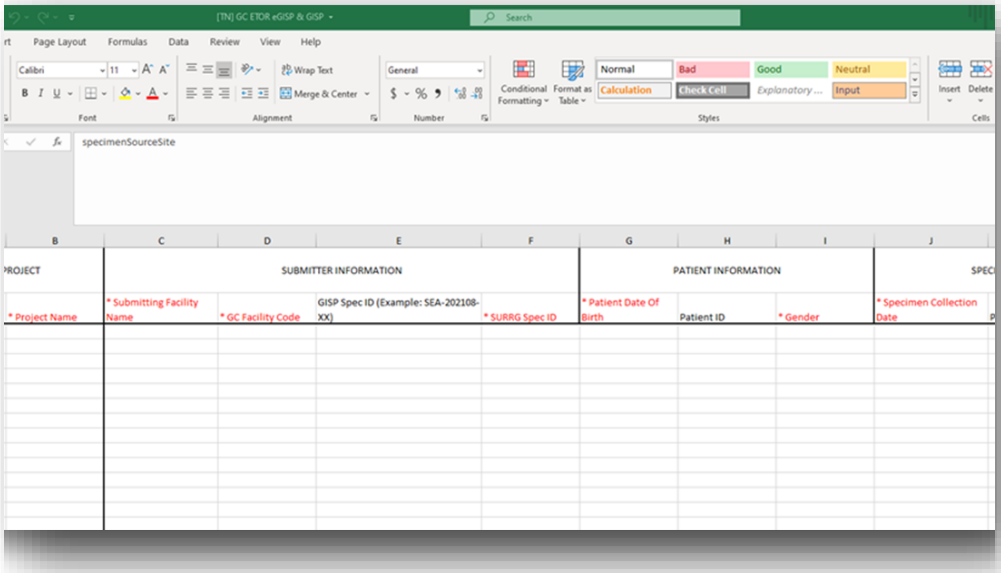


4. Open the saved Excel Spreadsheet and fill the required details in the fields.

   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
   - <u>ALWAYS</u> download the template for every use

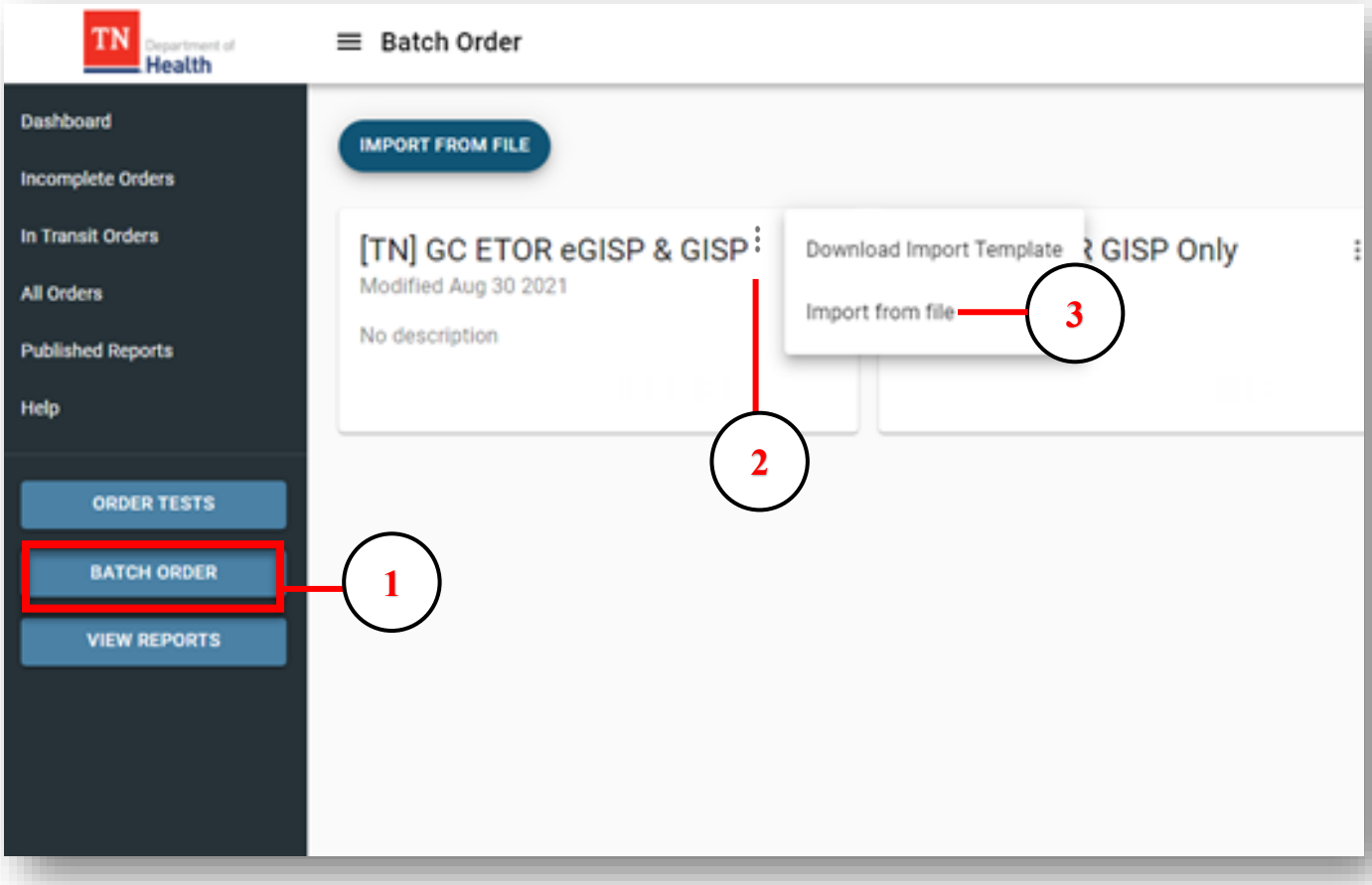


To Import the Batch Order Spreadsheet

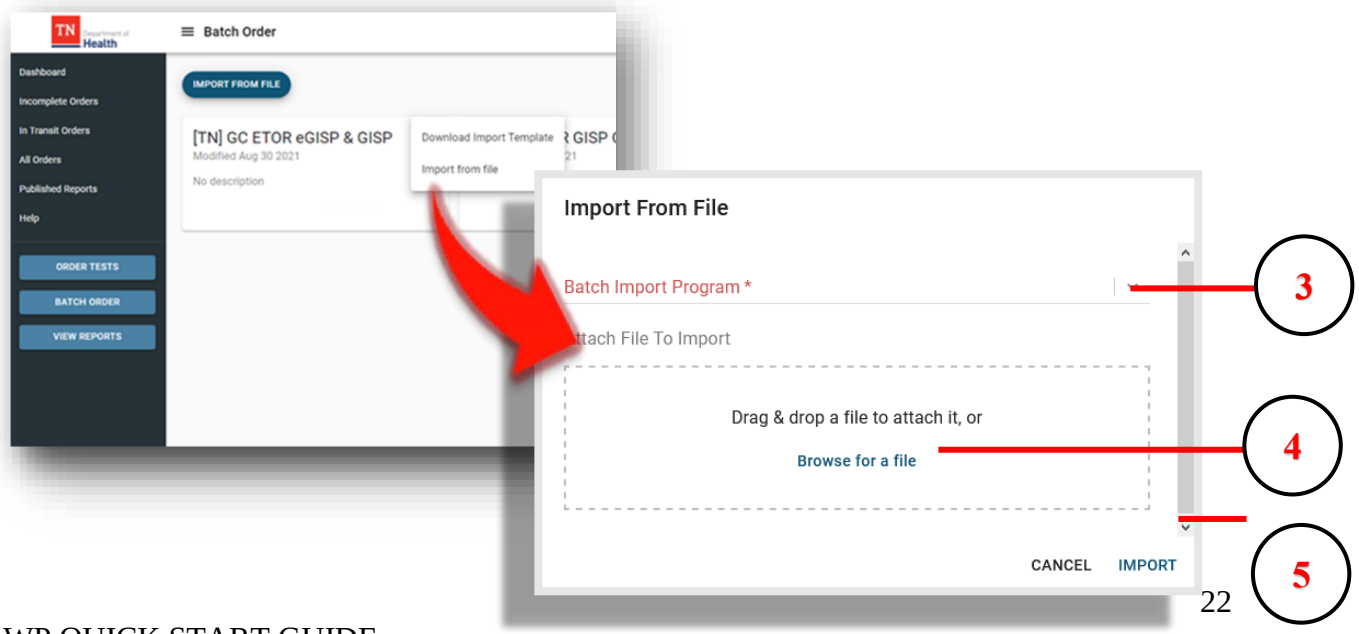
1. Click the **Batch Order** Call-To-Action Button
2. Click **IMPORT FROM FILE** to open the file import box

   NOTE: The Import from File option can also accessed by clicking the ⋮ icon on the [TN] GC ETOR eGISP & GISP, GISP Only, or SURRG & GISP Tile

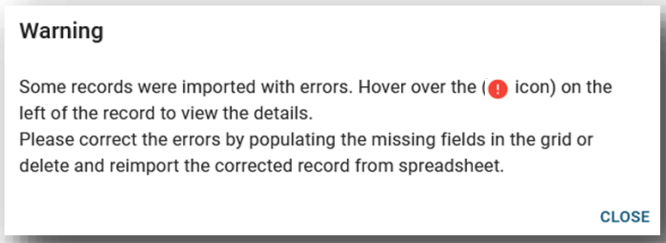
3. Click the down arrow for **Batch Import Program,** select the program matching the import file program.



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.



- 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

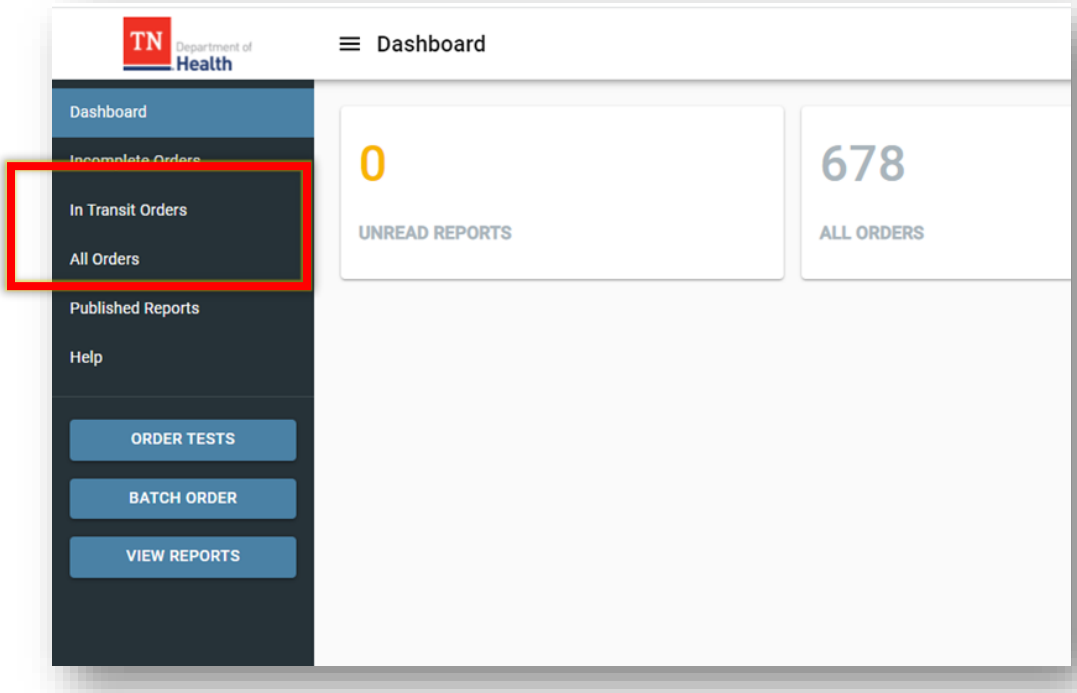
Once the spreadsheet is imported, verify the entries are correct and click **SUBMIT** to submit the batch order.

5

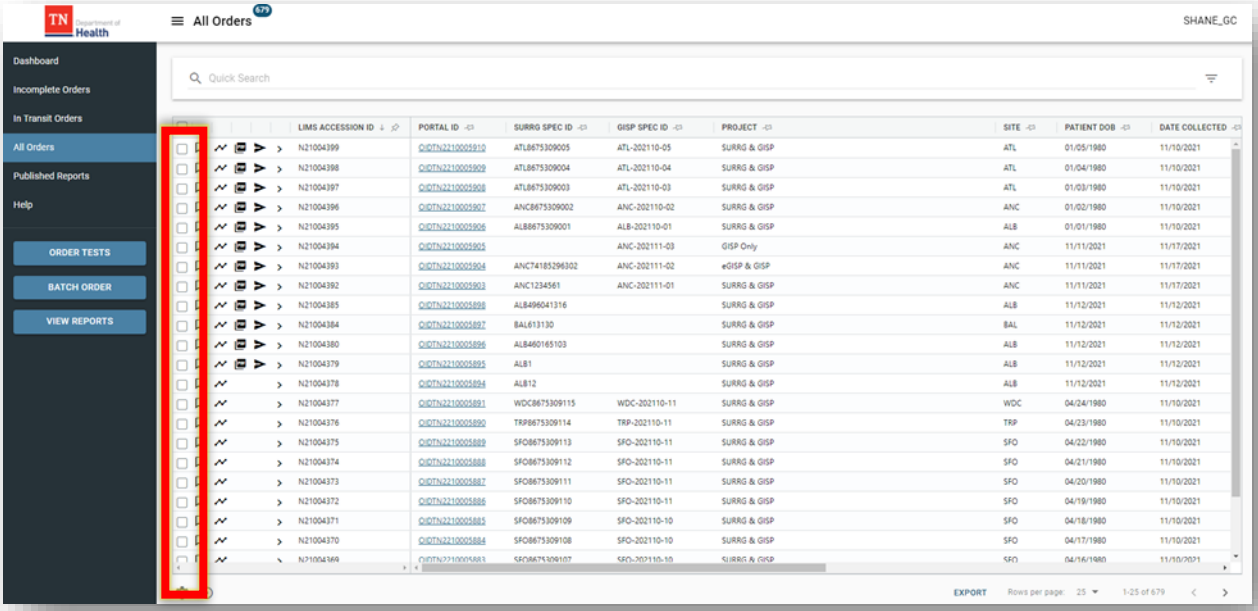
Accessing Orders, Reports and Patients

GC Shipping Manifests

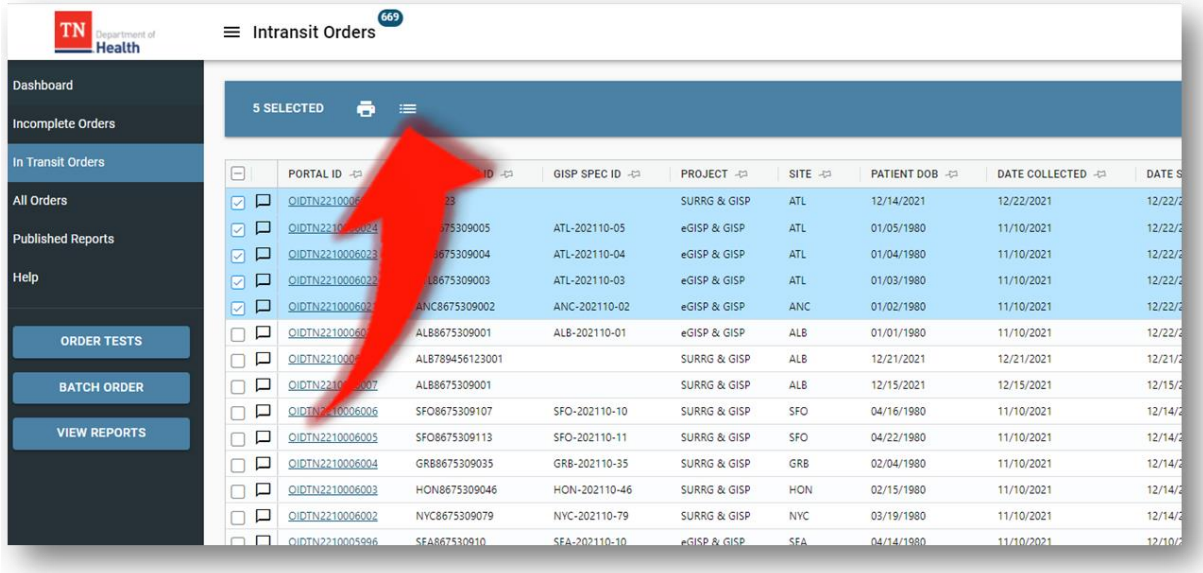
- Navigate to the **In Transit** or **All Orders** Data Grids



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



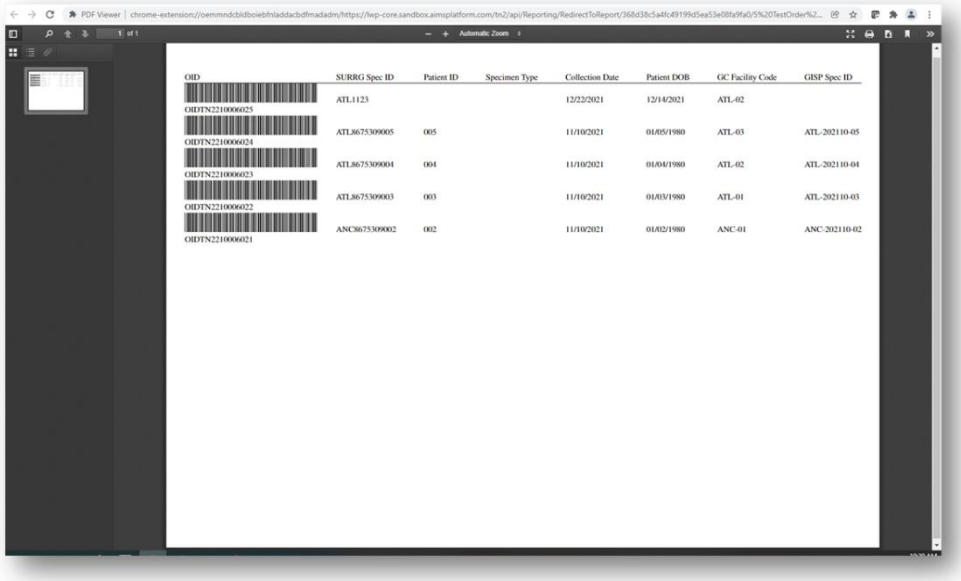
A blue bar will appear above the grid.



- Click on the icon to generate the 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.



Tracking Order Status

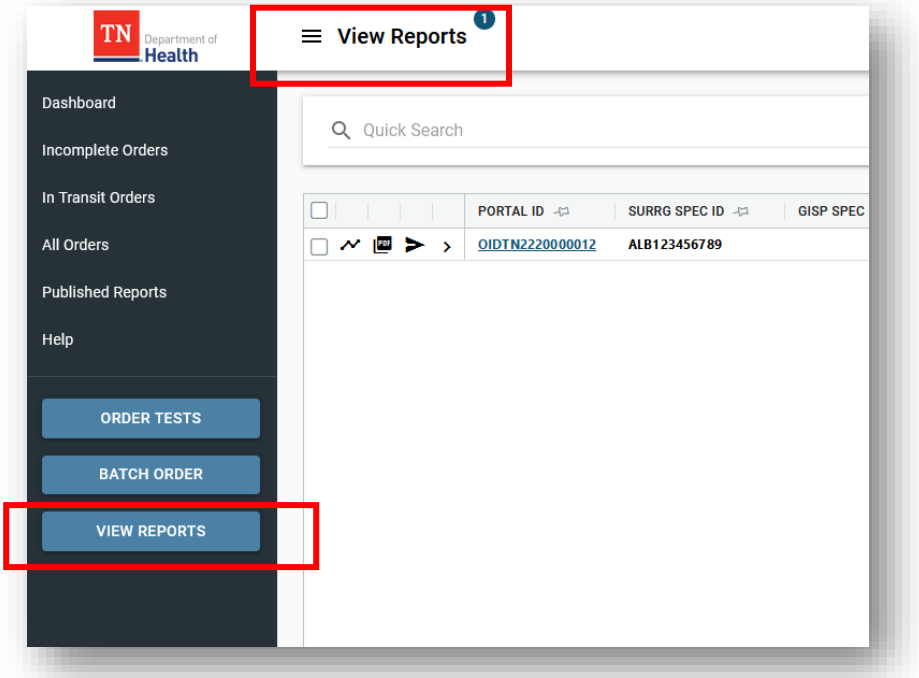
To see a status of your test order, open **All Orders** grid, locate your order and look for a value in the **Status** column. It can be one of the following:

- **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

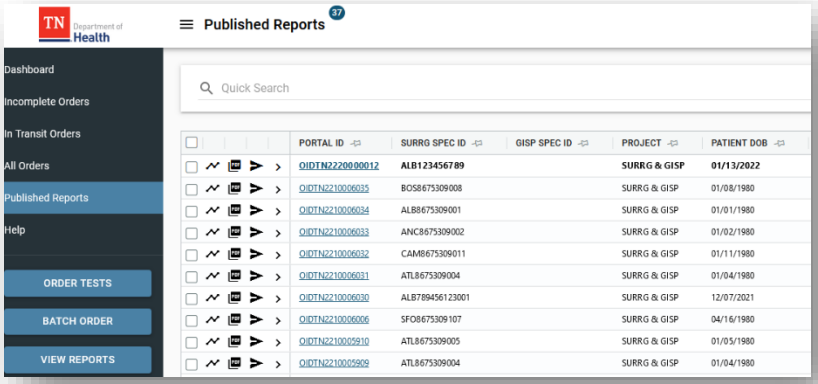
To view new (i.e. unread) published reports, click **VIEW REPORTS** button in the navigation bar. The number of unviewed reports will be notated in the header.



The **View Reports** grid is displayed.

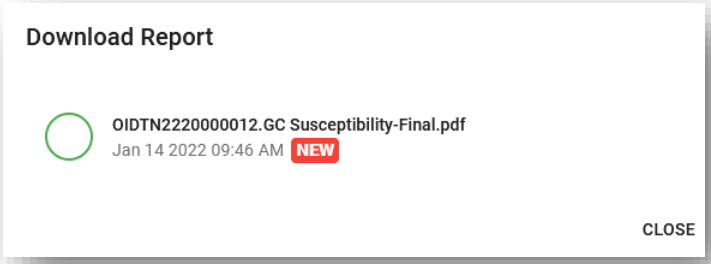
- Not viewed orders are displayed in bold.
- Once report has been viewed, the order disappears from the View Reports grid and moves to the Published Reports grid.

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

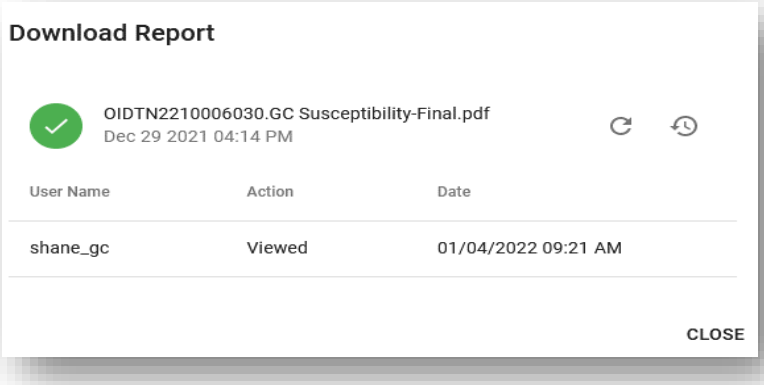


Note: Latest report always appears on top.

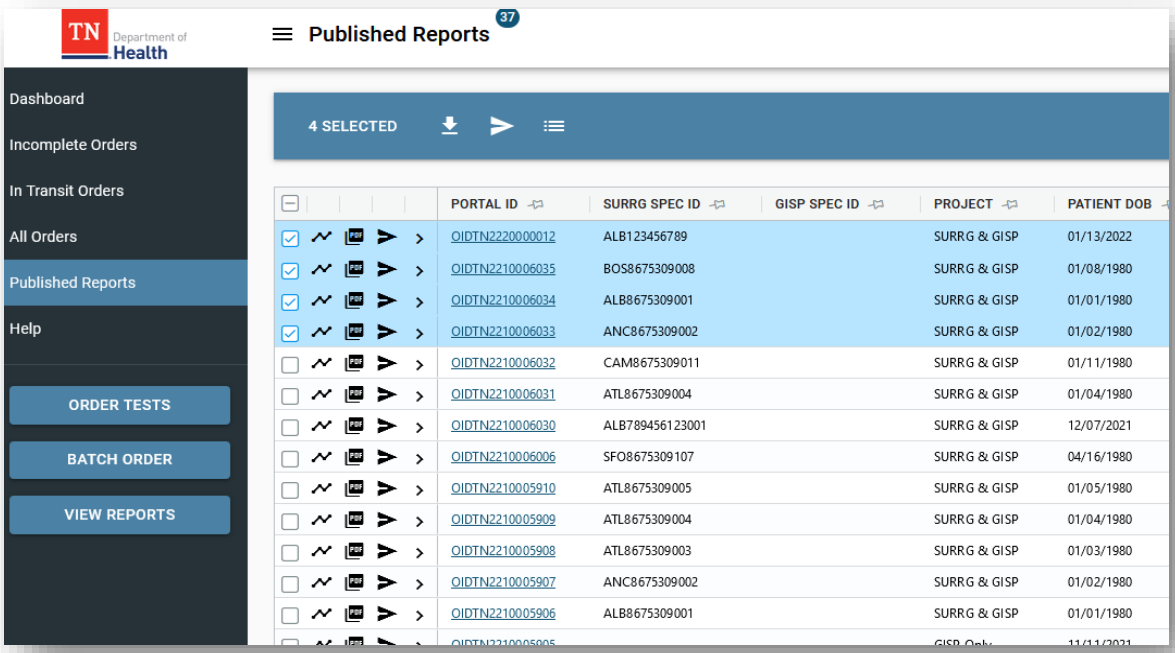
Unopened reports will have a “NEW” tag in red and no checkmark inside the green circle. The type of the report (Final, etc.) will be displayed as a part of the PDF name.



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



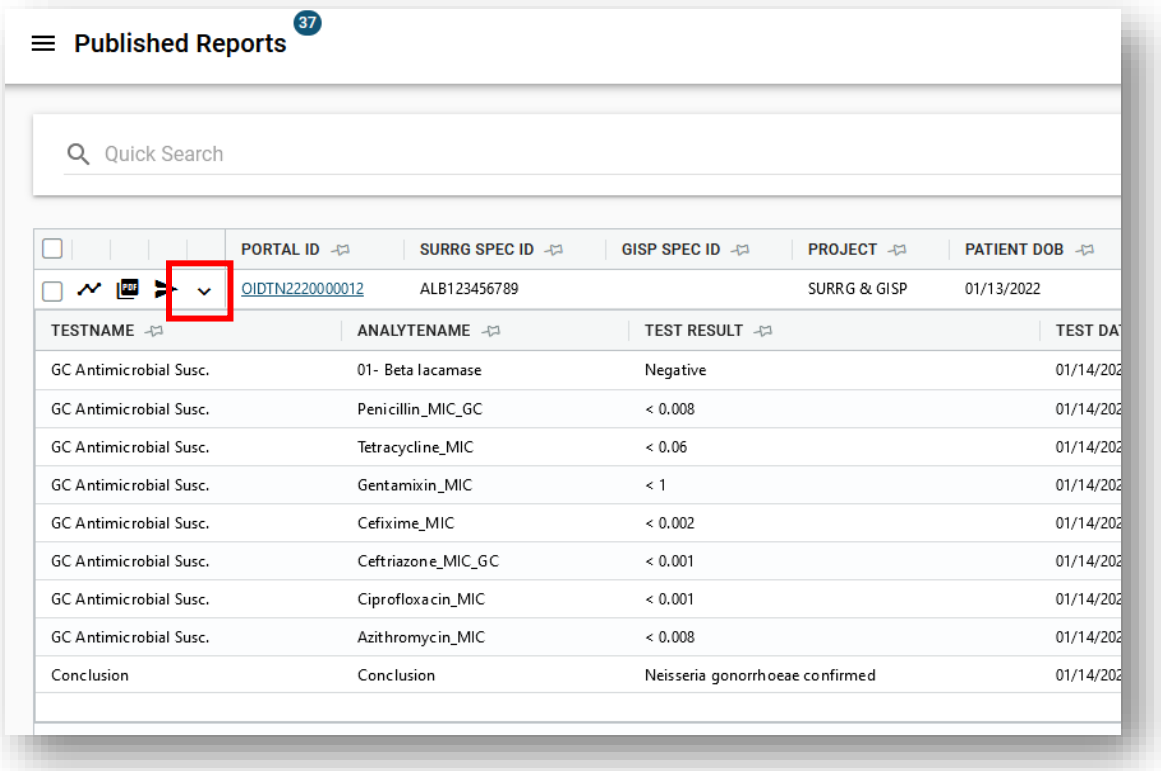
Click on icon to share published patient report with a 3rd party.



- 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.

Click on the > icon to open the drop-down menu to display report results.

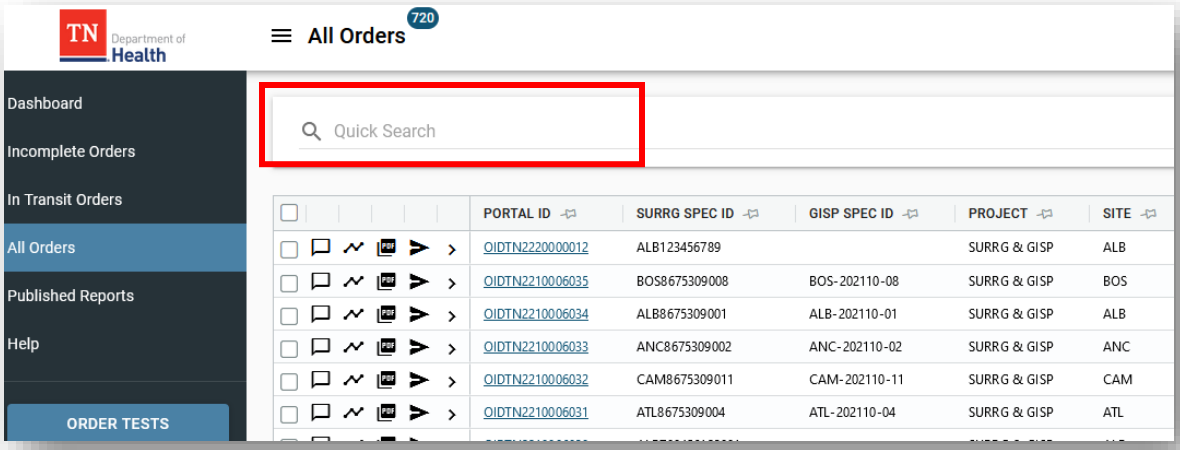


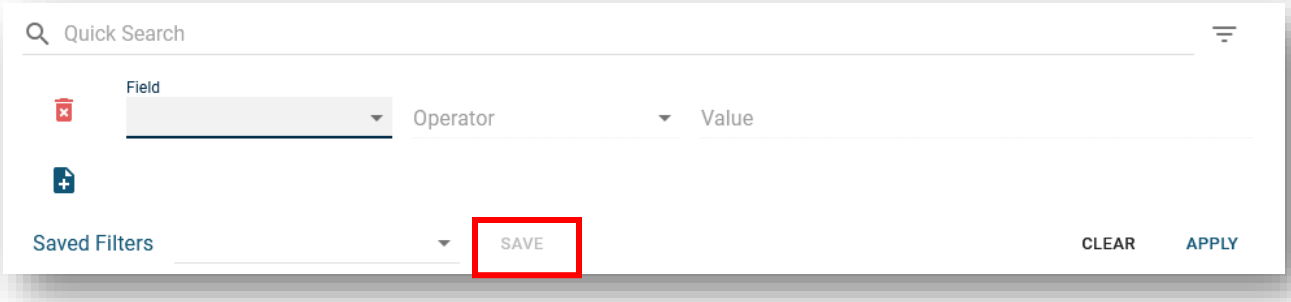
Data grids

- 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 the 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.