



## Lab Web Portal (LWP)

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# 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**

| <b>Revision</b> | <b>Author</b>     | <b>Date</b> | <b>Status and Description</b>                                                 |
|-----------------|-------------------|-------------|-------------------------------------------------------------------------------|
| 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.<br>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**

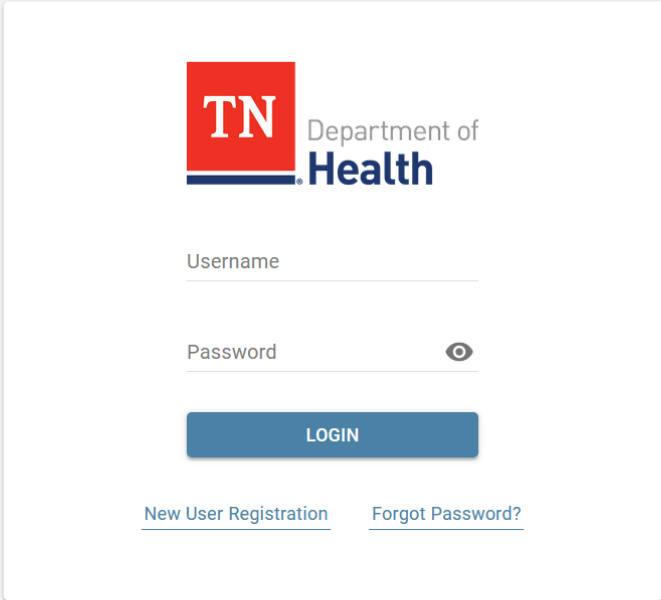
# 1

## 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/#/>

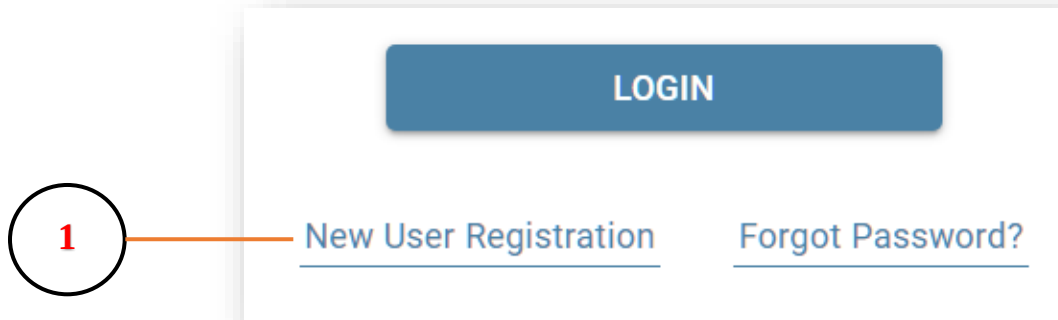


The screenshot shows the login page for the TN Department of Health Lab Web Portal. At the top is the logo, which consists of a red square with the letters 'TN' in white, followed by the text 'Department of Health' in a dark blue font. Below the logo are two input fields: 'Username' and 'Password'. The 'Password' field has a small eye icon to its right. Below these fields is a blue button with the word 'LOGIN' in white capital letters. At the bottom of the login area are two links: 'New User Registration' and 'Forgot Password?'. At the very bottom of the page, there is a footer containing the copyright information '©2007 - 2020 iConnect Consulting, Inc.', the links 'Order Support' and 'Technical Support', and the date and version '13 Oct 2020 19:07 8.2.0.1179'.

- 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.

## 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](#)

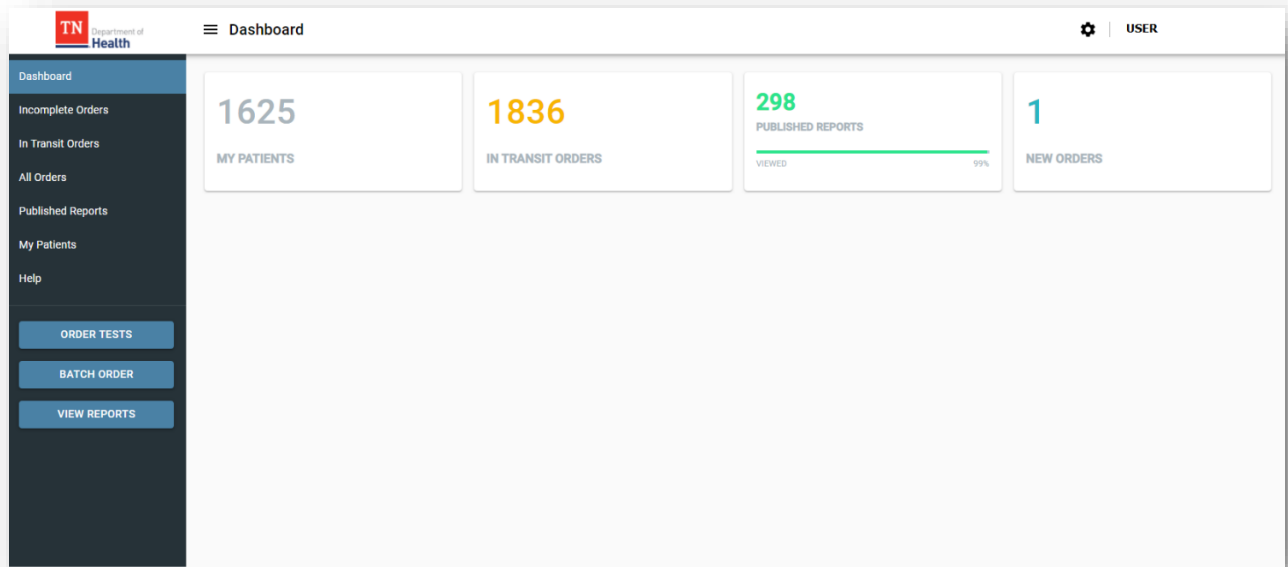
SUBMIT

[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

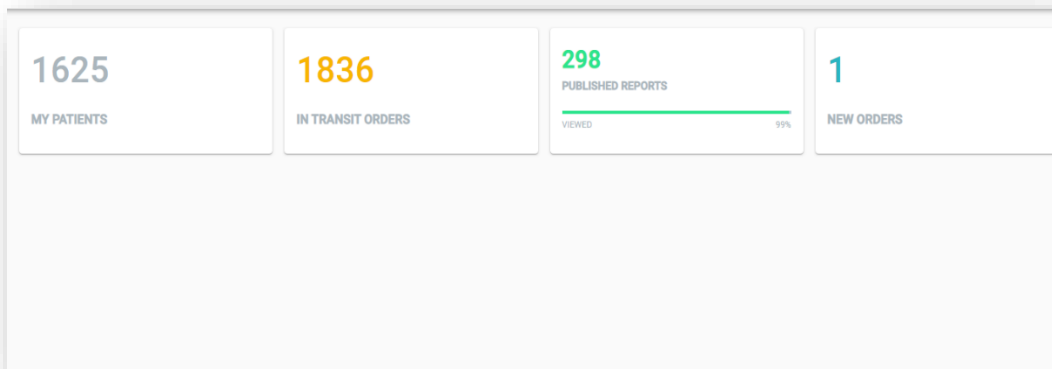
There are 3 blue buttons on the bottom left side of the Navigation Panel.

- **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

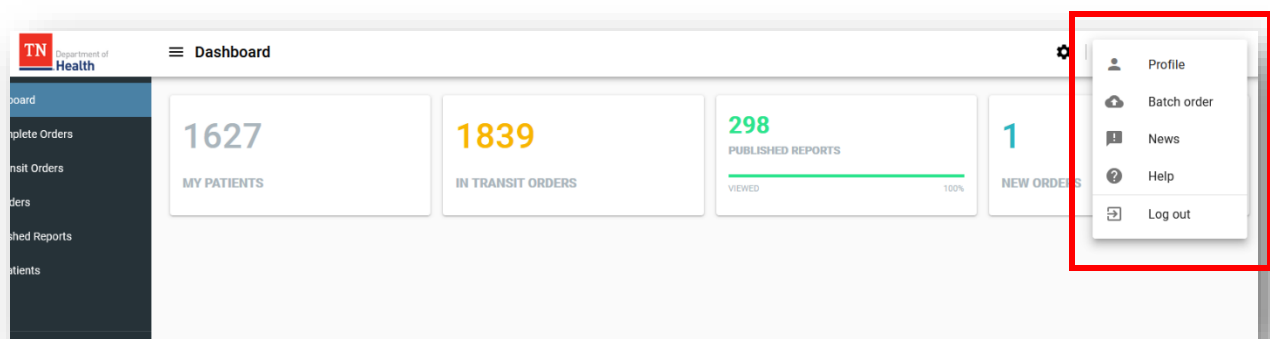
The tiles you see on your Dashboard are your counters and key performance indicators.

- 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;

**Profile** STEVE FROST

**PERSONAL INFO** MANAGE NOTIFICATIONS CHANGE PASSWORD

|                     |                                   |                               |
|---------------------|-----------------------------------|-------------------------------|
| First Name<br>Steve | Last Name<br>Frost                | Title<br>CORE Admin           |
| Email Address       | Address<br>123 Nice Houses Street | City<br>Nicecity              |
| State<br>CA         | ZIP<br>12345                      | Primary Phone<br>234-456-7789 |
| Primary Fax         | Role<br>LWP_Admin                 |                               |

Organizations  
 Alpine County Health and Human Services  
 Alpine CHD  
 Alameda County Public Health Laboratory  
 Alameda CHD

CANCEL SAVE

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

**Profile** STEVE FROST

PERSONAL INFO **MANAGE NOTIFICATIONS** CHANGE PASSWORD

| # | Event                   | Type  | Frequency   | Enabled | Delete |
|---|-------------------------|-------|-------------|---------|--------|
| 1 | New Report is available | Email | Immediately | no      |        |

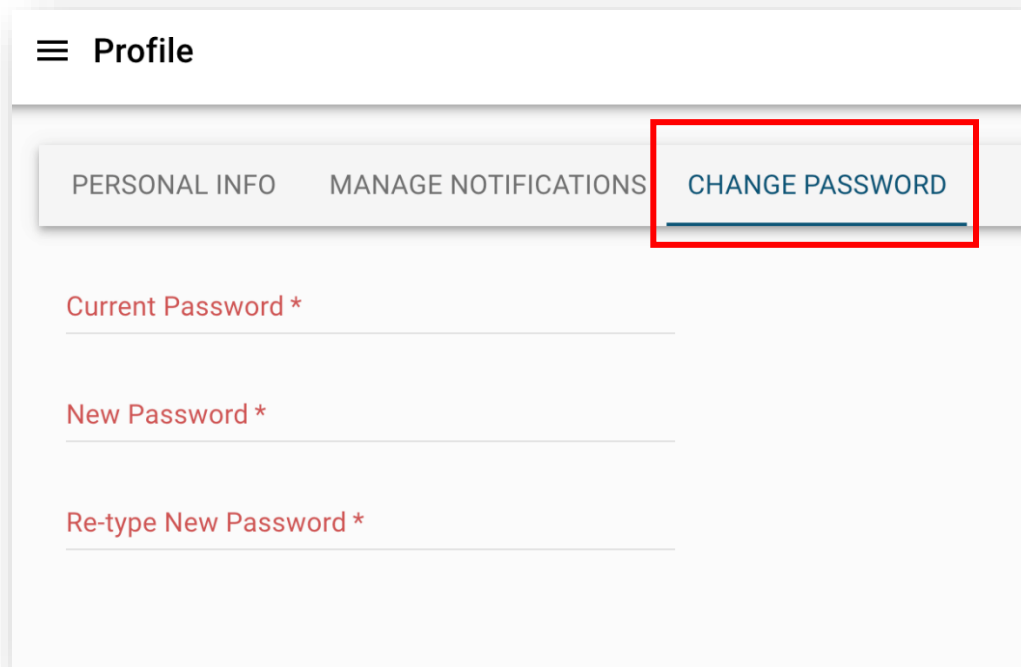
ADD NOTIFICATION

☒ Enabled

New Report is available    Email    Immediately

SAVE

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



The screenshot shows a 'Profile' page with a hamburger menu icon and the title 'Profile'. Below the title is a horizontal navigation bar with three tabs: 'PERSONAL INFO', 'MANAGE NOTIFICATIONS', and 'CHANGE PASSWORD'. The 'CHANGE PASSWORD' tab is highlighted with a red rectangular box. Below the navigation bar, there are three input fields, each with a red label and an asterisk: 'Current Password \*', 'New Password \*', and 'Re-type New Password \*'. Each label is positioned above its corresponding input field.

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

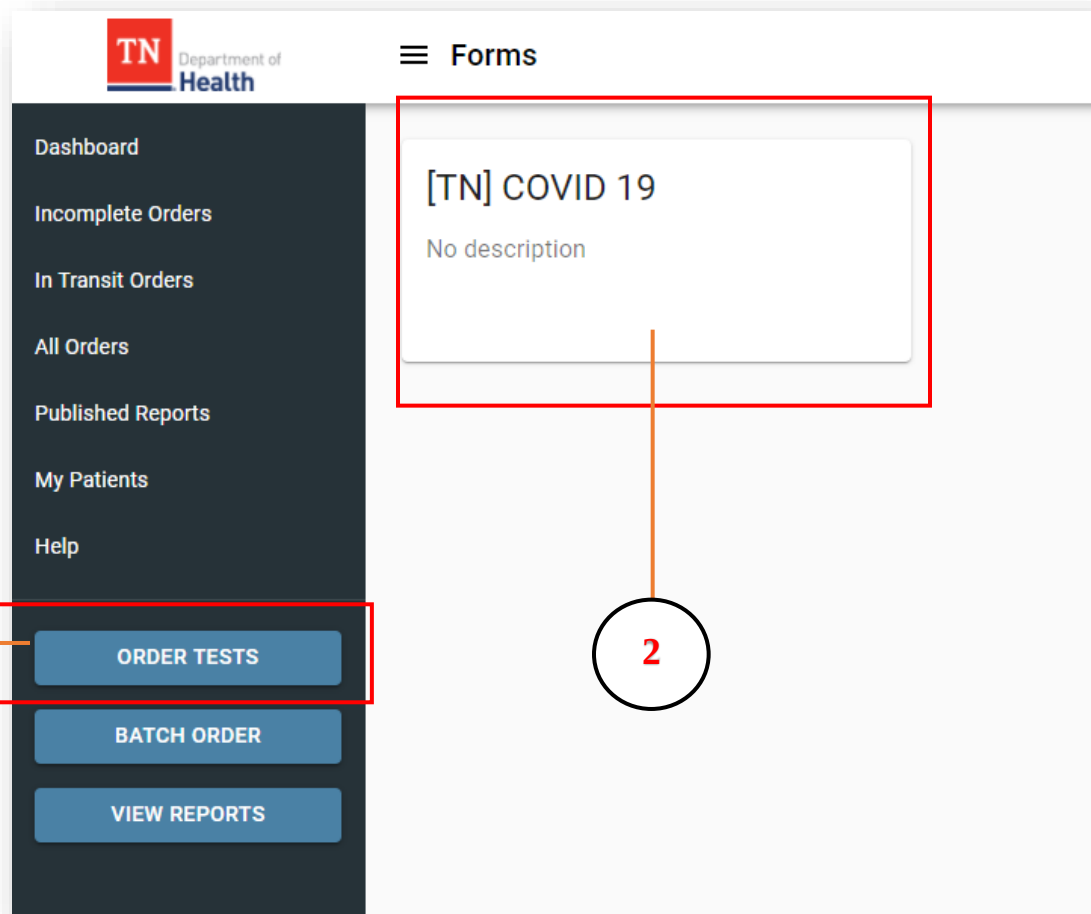
### 3

## 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.

PATIENT INFORMATION

Last Name \*

ge

Washington, George , 09/10/1910

TAYLOR, ROGER , 12/31/1946

SANCHEZ RODRIGUEZ, GERARDO ALEXIS , 07/29/1983

LATHERS, GEORGETTA V, 12/15/1982

JUNGLE, GEORGE , 01/09/2019

4

3

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.

**Add new patient**

Last Name \* First Name \* MI

Date Of Birth \*

Street Address \*

City \* State \* | County

Zip Code \* Cell Number

Sex \*

☐ Male ☐ Female ☐ Unknown

Race \*

☐ American Indian or Alaskan Native ☐ Asian ☐ Native Hawaiian or Other Pacific Islander

☐ Black or African American ☐ White ☐ Other ☐ unknown ☐ Refused to Report

CLOSE CLEAR SUBMIT

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

**SPECIMEN INFORMATION**

**Collection Date and Time \*** **Test \*** ☒ COVID-19 RNA PCR ☐ COVID-19 IgG EIA

This field is required

**Specimen Type \***

☐ Nasal swab ☐ Nasopharyngeal swab ☐ Nasopharyngeal and oropharyngeal swab ☐ Oropharyngeal swab ☐ Anterior nares swab ☐ Bronchoalveolar lavage

☐ Lower respiratory fluid sample ☐ Nasal aspirate ☐ Nasopharyngeal aspirate ☐ Nasopharyngeal washings ☐ Serum ☐ Sputum ☐ Stool

☐ Throat swab ☐ Tracheal aspirate ☐ Urine

This field is required

Outbreak/Event ID | PUI ID

**Laboratory Name \***

This field is required

Laboratory Address

Comments

- 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.*

Outbreak/Event ID | PUI ID

None

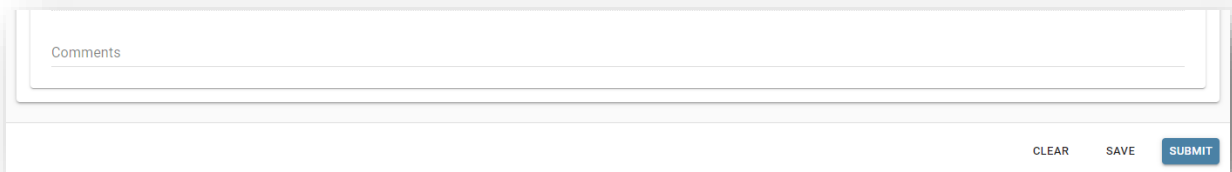
Knoxville

Nashville

Comments

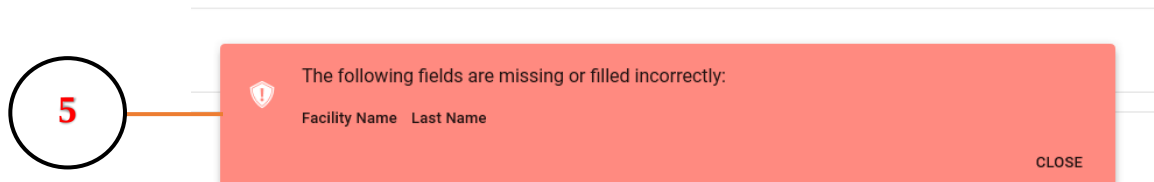
CLEAR SAVE **SUBMIT**

Enter additional comments in the Comments field, if necessary

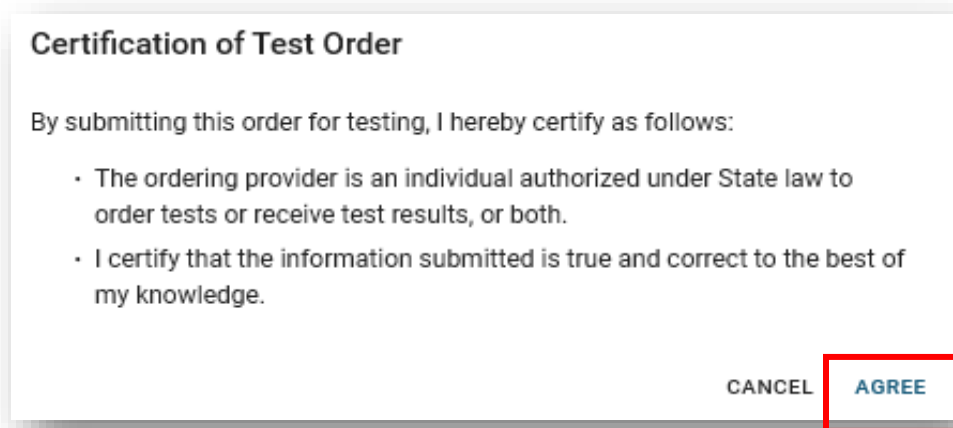
A screenshot of a web form interface. At the top, there is a text input field labeled "Comments". Below the input field, there is a horizontal bar containing three buttons: "CLEAR", "SAVE", and "SUBMIT". The "SUBMIT" button is highlighted in blue.

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.

A screenshot of a "Certification of Test Order" dialog box. The title "Certification of Test Order" is at the top. Below the title, it says "By submitting this order for testing, I hereby certify as follows:". There are two bullet points: "The ordering provider is an individual authorized under State law to order tests or receive test results, or both." and "I certify that the information submitted is true and correct to the best of my knowledge." At the bottom right, there are two buttons: "CANCEL" and "AGREE". The "AGREE" button is highlighted with a red border.

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

The screenshot shows a web application interface for a COVID-19 form. A modal window is open, titled "Please respond to the following questions:". The modal contains five questions, each with a red "Answer \*" label and three radio button options: "Yes", "No", and "Unknown".

**Question 1:** Is this the patient's first COVID-19 test?  
Answer \*  
☐ Yes ☐ No ☐ Unknown

**Question 2:** Is the patient hospitalized?  
Answer \*  
☐ Yes ☐ No ☐ Unknown

**Question 3:** Is the patient in the ICU?  
Answer \*  
☐ Yes ☐ No ☐ Unknown

**Question 4:** Is the patient a resident of a congregate care setting? (including nursing homes, residential care for people with intellectual and developmental disabilities, psychiatric treatment facilities, group homes, board and care homes, homeless shelter, foster care or other setting)  
Answer \*  
☐ Yes ☐ No ☐ Unknown

**Question 5:** Is the patient employed in Healthcare?  
Answer \*  
☐ Yes ☐ No ☐ Unknown

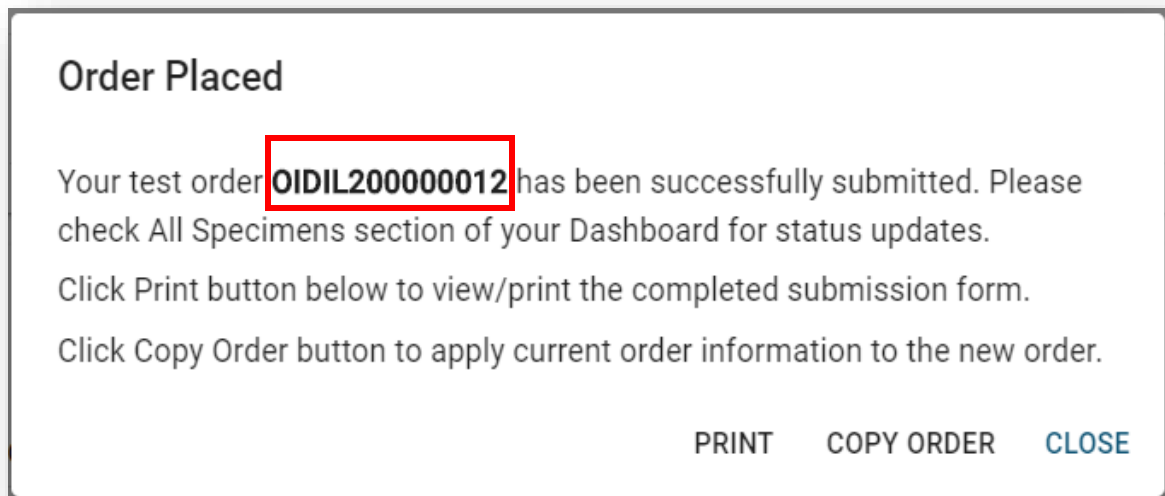
At the bottom right of the modal, there are two buttons: "CLOSE" and "SUBMIT".

In the background, a form titled "[TN] COVID 19" is visible. It includes a sidebar with "Forms / [TN]" and "PATIENT" information. The form fields include "Last Name", "TEST", "Date Of Birth" (01/01/19), "Address" (123 Any), "City" (Any Town), "County of" (Bedford), "Gender" (Male), "Race" (Black or), "Medical", and a "SUBMIT" button.



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.



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.*

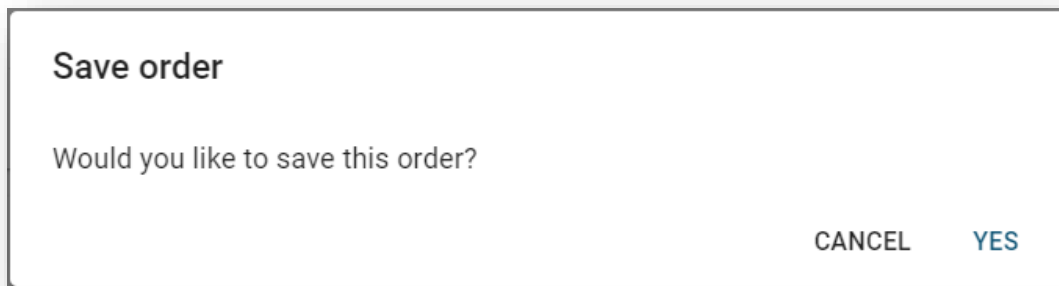
|                                                                                                                                                                                                                                                                                      |  |                                                                                                                                                                      |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| <b>2101 Medical Center Way</b><br>Knoxville, TN 37920<br>(865) 549-5201                                                                                                                                                                                                              |  | COVID-19 RNA PCR Requisition<br>Date Submitted: 10/29/2020 1:13:02 PM<br>Submitted By: Stephanie Poindexter                                                          |  |
|                                                                                                                                                                                                     |  |                                                                                    |  |
| Order ID: <b>OIDTN2200002249</b>                                                                                                                                                                                                                                                     |  |                                                                                                                                                                      |  |
| <b>Patient Demographics</b>                                                                                                                                                                                                                                                          |  |                                                                                                                                                                      |  |
| Last Name: <b>TEST</b><br>Date of Birth: <b>01/01/1991</b><br>Address: <b>123 Any Street</b><br>State: <b>TN</b><br>Gender: <b>Male</b><br>Race: <b>Black or African American</b><br>MRN:                                                                                            |  | First Name: <b>TEST</b><br>Phone Number: <b>1235551234</b><br>City: <b>Any Town</b><br>Zip Code: <b>12345</b><br>County: <b>Bedford</b><br>Ethnicity: <b>Unknown</b> |  |
| <b>Submitter Information</b>                                                                                                                                                                                                                                                         |  |                                                                                                                                                                      |  |
| Facility Name: <b>Tennessee Dept. of Health Division of Lab Services</b><br>Phone Number: <b>615-262-6300</b><br>Address: <b>630 Hart Lane</b><br>State: <b>TN</b>                                                                                                                   |  |                                                                                                                                                                      |  |
| Point of Contact: <b>Gibbs, Paula</b><br>Phone Number: <b>615-262-6300</b><br>Fax Number:                                                                                                                                                                                            |  |                                                                                                                                                                      |  |
| Ordering Provider: <b>[REDACTED]</b><br>Phone Number: <b>[REDACTED]</b><br>Email: <b>[REDACTED]</b><br>Address: <b>630 Hart Lane</b><br>State: <b>AR</b>                                                                                                                             |  |                                                                                                                                                                      |  |
| NPI: <b>1234567890</b><br>Fax Number:<br>City: <b>Nashville</b><br>Zip Code: <b>[REDACTED]</b>                                                                                                                                                                                       |  |                                                                                                                                                                      |  |
| <b>Specimen Information</b>                                                                                                                                                                                                                                                          |  |                                                                                                                                                                      |  |
| Collection Date And Time: <b>10/29/2020 12:30:00 PM</b> Test: <b>COVID-19 RNA PCR</b><br>Specimen Type: <b>Nasopharyngeal and oropharyngeal swab</b><br>Outbreak/Event ID:      PUI ID:                                                                                              |  |                                                                                                                                                                      |  |
| <b>Additional Comments/Information:</b>                                                                                                                                                                                                                                              |  |                                                                                                                                                                      |  |
|                                                                                                                                                                                                                                                                                      |  |                                                                                                                                                                      |  |
| <b>Q&amp;A</b>                                                                                                                                                                                                                                                                       |  |                                                                                                                                                                      |  |
| Is this the patient's first COVID-19 test?                                                                                                                                                                                                                                           |  | Unknown                                                                                                                                                              |  |
| Is the patient hospitalized?                                                                                                                                                                                                                                                         |  | Unknown                                                                                                                                                              |  |
| Is the patient in the ICU?                                                                                                                                                                                                                                                           |  | Unknown                                                                                                                                                              |  |
| Is the patient a resident of a congregate care setting? (including nursing homes, residential care for people with intellectual and developmental disabilities, psychiatric treatment facilities, group homes, board and care homes, homeless shelter, foster care or other setting) |  | Unknown                                                                                                                                                              |  |
| Is the patient employed in Healthcare?                                                                                                                                                                                                                                               |  | Unknown                                                                                                                                                              |  |
| Is the patient symptomatic, as defined by the CDC?                                                                                                                                                                                                                                   |  | No                                                                                                                                                                   |  |

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## Saving Test Orders

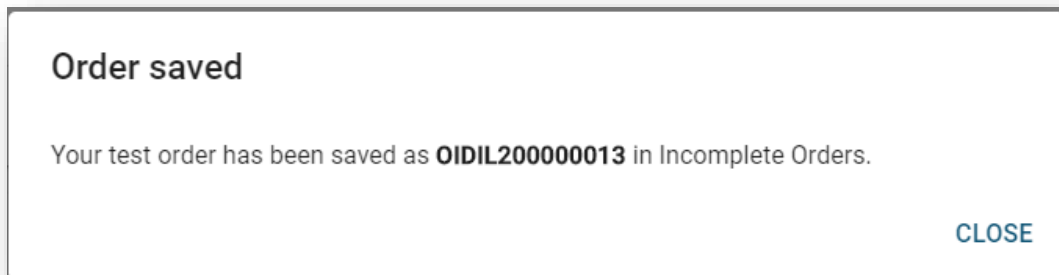
Incomplete test orders can be saved to be completed and submitted later.

- 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

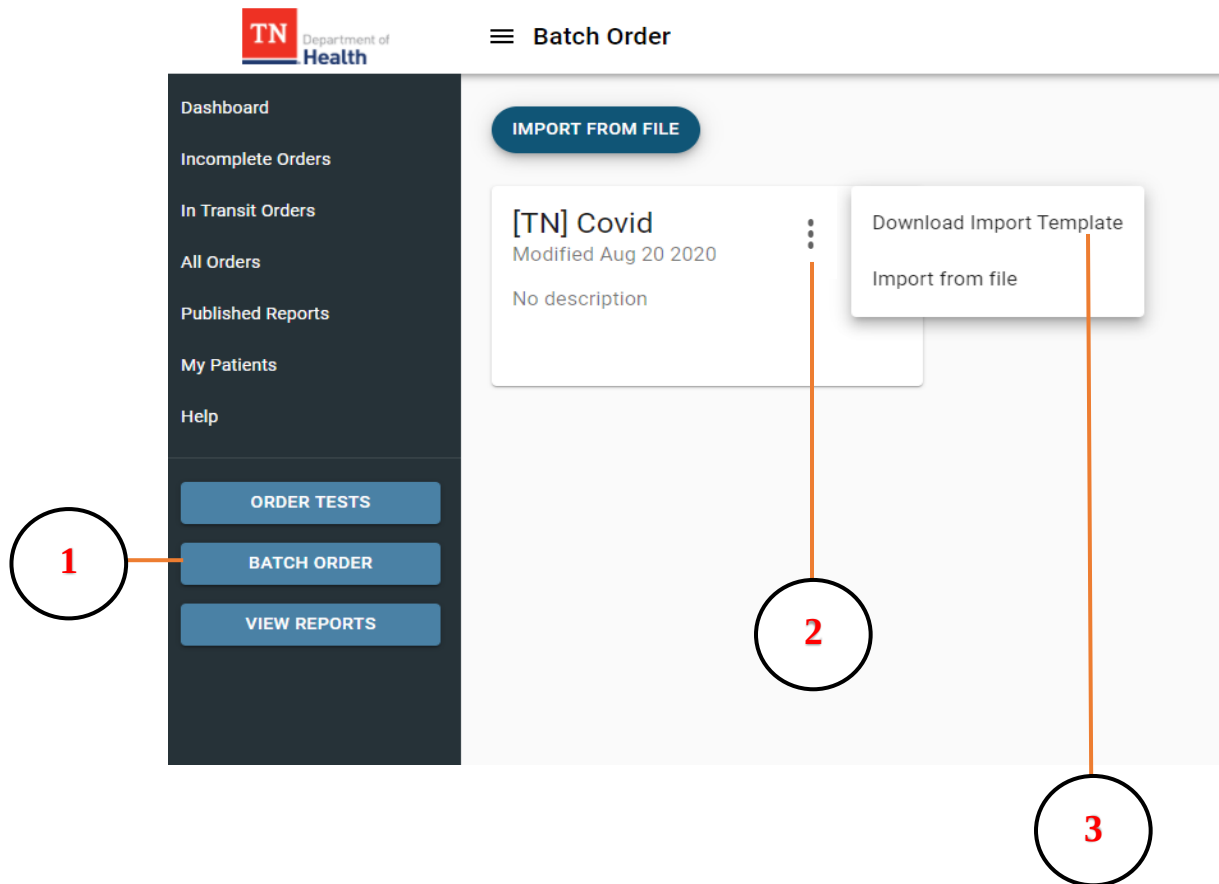
### Batch Order

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**.

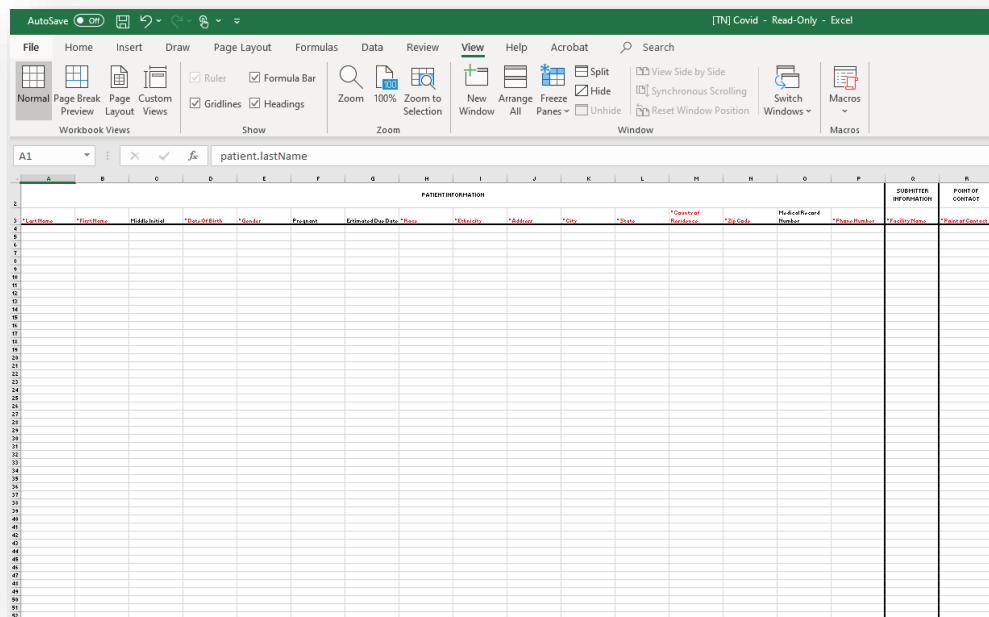


2. Click the 3-button link on the upper corner of the tile.
3. Select **Download Import Template** from the two menu options. Save the excel spreadsheet.
4. Open the saved Excel Spreadsheet and fill the required details in the fields.  
**Note:** the dropdown menus for some of the required values.

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

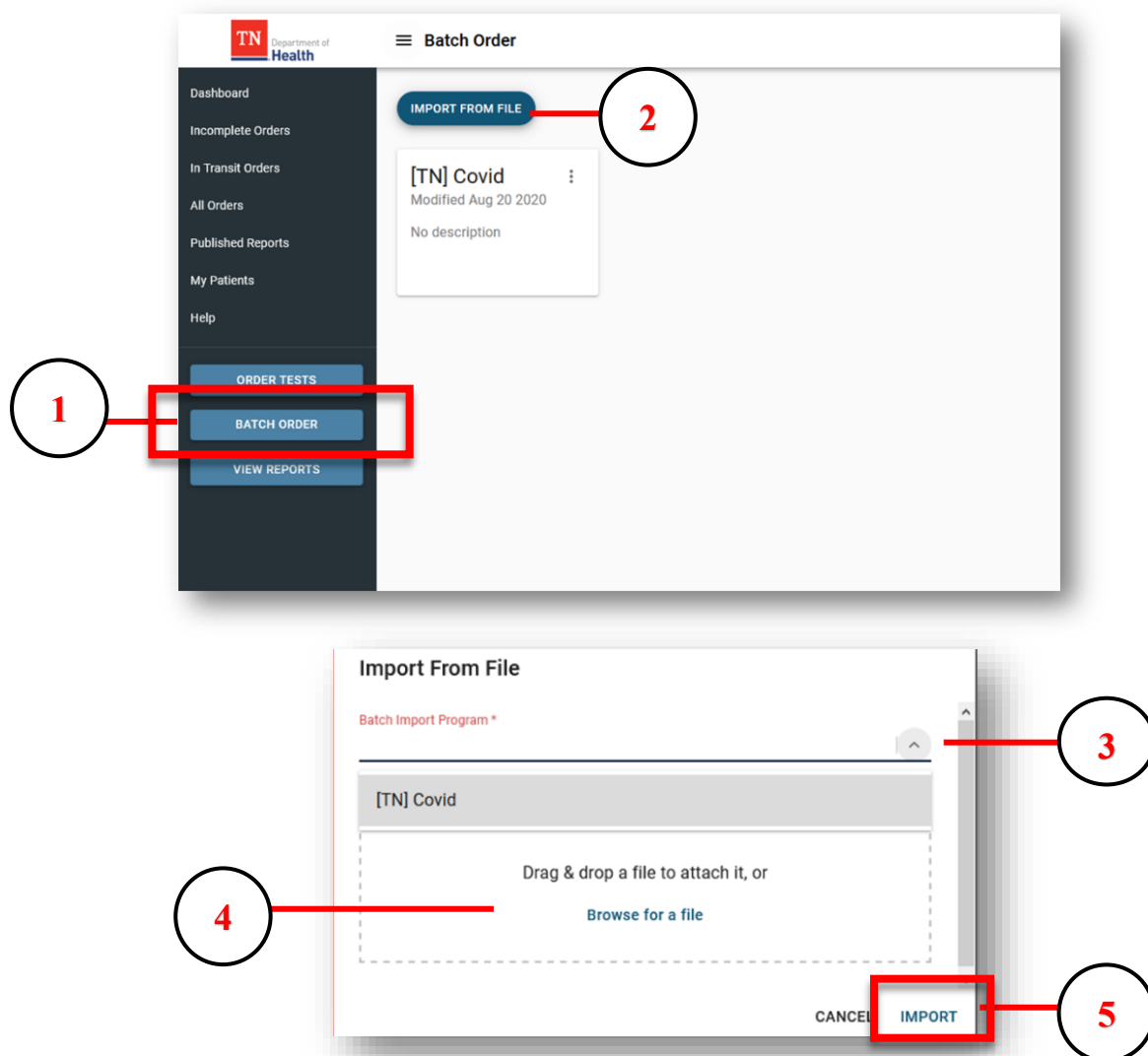
6. Requirements of the **Batch Import Template**:

- All fields in **red** are required
- ALWAYS download it for every use

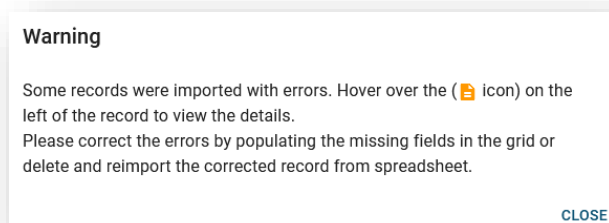


## To Import the Batch Order Spreadsheet

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 be accessed by clicking the **:** 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.

## 5

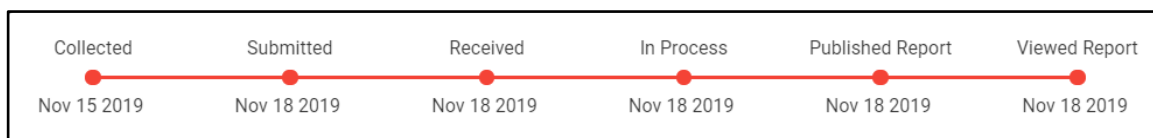
### Accessing Orders, Reports and Patients

#### 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:

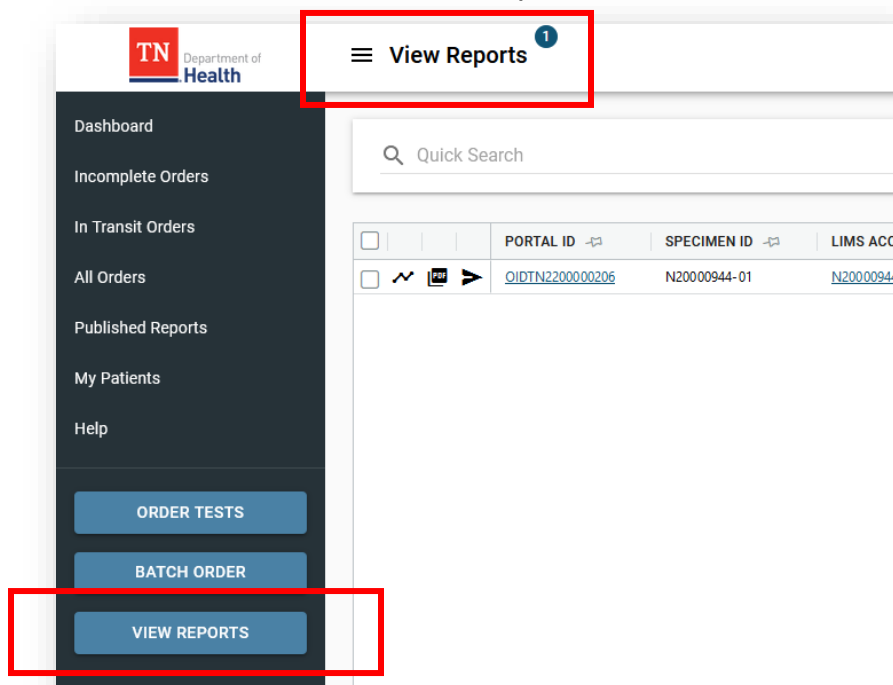
- **InTransit** – order has been submitted but not yet received by the lab
- **ReceivedInLab** – order has been received in lab but not yet tested
- **InProcess** – order is being tested by the lab
- **Released** – testing is done, order is released, results reports published
- **Canceled** – order is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







| 3 selected CANCEL   |                                                                                                                                                                                                                                                       |                                                                                              |                                                                                                   |                                                                                                 |                    |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|--------------------|--|
|                                                                                                      |                                                                                                                                                                                                                                                       | SPECIMENID  | LIMSACCESSIONID  | PATIENTNAME  | PATIENTDATEOFBIRTH |  |
| <input checked="" type="checkbox"/>                                                                                                                                                   |    | OIDLA200000059                                                                               | C20000212MB01                                                                                     | Cruise, Tom                                                                                     | 02/02/1963         |  |
| <input checked="" type="checkbox"/>                                                                                                                                                   |    | OIDLA200000058                                                                               | C20000211MB01                                                                                     | SNAKE, SILLY                                                                                    | 02/06/2013         |  |
| <input checked="" type="checkbox"/>                                                                                                                                                   |    | OIDLA200000057                                                                               | C20000210MB01                                                                                     | ana, mama                                                                                       | 02/02/2000         |  |
| <input type="checkbox"/>                                                                                                                                                              |    | OIDLA200000056                                                                               | C20000209MB01                                                                                     | Silly, String R                                                                                 | 04/12/1977         |  |
| <input type="checkbox"/>                                                                                                                                                              |    | OIDLA200000053                                                                               | C20000206MB01                                                                                     | Washington, George                                                                              | 09/10/1910         |  |

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

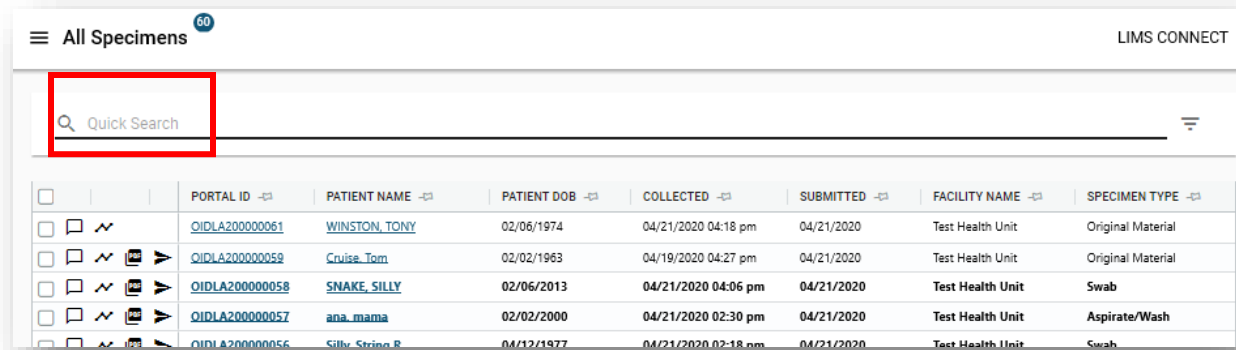
**Note:** recipient will get temporary access to the portal to download shared reports. To download or share multiple patient reports at once, select multiple orders and then click on  to download a single PDF with multiple patient reports or  to share multiple patient reports at once. Results Reports 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

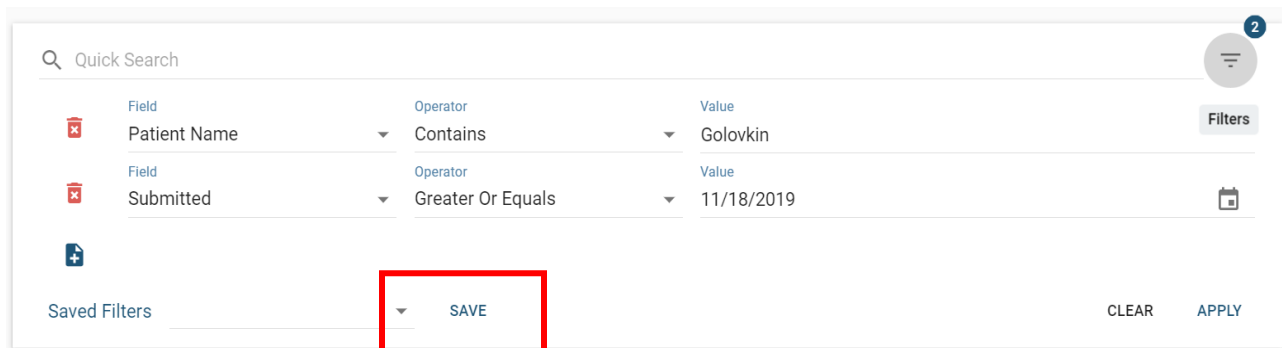
Use **Quick Search** box at the top to search across all columns in the grid:



The screenshot shows the 'All Specimens' interface with a 'Quick Search' box highlighted by a red rectangle. The grid contains the following data:

|                          | PORTAL ID      | PATIENT NAME    | PATIENT DOB | COLLECTED           | SUBMITTED  | FACILITY NAME    | SPECIMEN TYPE     |
|--------------------------|----------------|-----------------|-------------|---------------------|------------|------------------|-------------------|
| <input type="checkbox"/> | OIDLA200000061 | WINSTON, TONY   | 02/06/1974  | 04/21/2020 04:18 pm | 04/21/2020 | Test Health Unit | Original Material |
| <input type="checkbox"/> | OIDLA200000059 | Cruise, Tom     | 02/02/1963  | 04/19/2020 04:27 pm | 04/21/2020 | Test Health Unit | Original Material |
| <input type="checkbox"/> | OIDLA200000058 | SNAKE, SILLY    | 02/06/2013  | 04/21/2020 04:06 pm | 04/21/2020 | Test Health Unit | Swab              |
| <input type="checkbox"/> | OIDLA200000057 | ana, mama       | 02/02/2000  | 04/21/2020 02:30 pm | 04/21/2020 | Test Health Unit | Aspirate/Wash     |
| <input type="checkbox"/> | OIDLA200000056 | Silly, String B | 04/12/1977  | 04/21/2020 02:18 pm | 04/21/2020 | Test Health Unit | Swab              |

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



The screenshot shows the filter panel with two filters applied. The 'SAVE' button is highlighted with a red rectangle.

| Field        | Operator          | Value      |
|--------------|-------------------|------------|
| Patient Name | Contains          | Golovkin   |
| Submitted    | Greater Or Equals | 11/18/2019 |

Buttons: **SAVE**, CLEAR, APPLY

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.

The screenshot shows a 'PATIENT DEMOGRAPHIC' form with the following fields and values:

- Last Name: Washington
- First Name: George
- MI: [blank]
- Date Of Birth: 09/10/1910
- Date Of Death: 04/19/2020
- Address: 123 American St
- City: Monroe
- State: LA
- Zip Code: 71111
- Parish: Madison
- Marital Status: [blank]
- Gender: ☒ Male ☐ Female
- Race: ☐ Other
- Ethnicity: ☐ Hispanic
- MRN: 12345
- Medicaid Number: 65thg

An 'EDIT' button is located at the bottom right of the form.

**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.

The screenshot shows the 'ORDERS' tab with a search bar and a table of orders. The table has the following columns: KEY, STATUS, SPECIMEN ID, COLLECTED, SUBMITTED, FACILITY NAME, SPECIMEN TYPE, and TRF. The table contains 18 rows of data, with the 11th row highlighted in yellow.

|                          | KEY                            | STATUS        | SPECIMEN ID | COLLECTED           | SUBMITTED  | FACILITY NAME    | SPECIMEN TYPE                                     | TRF |
|--------------------------|--------------------------------|---------------|-------------|---------------------|------------|------------------|---------------------------------------------------|-----|
| <input type="checkbox"/> | <a href="#">CID19200000377</a> | InTransit     |             | 04/23/2020 03:17 pm | 04/23/2020 | Test Health Unit |                                                   |     |
| <input type="checkbox"/> | <a href="#">CID19200000376</a> | InTransit     |             | 04/23/2020 02:15 pm | 04/23/2020 | Test Health Unit |                                                   |     |
| <input type="checkbox"/> | <a href="#">CID19200000370</a> | InTransit     |             | 04/23/2020 09:53 am | 04/23/2020 | Test Health Unit | Blood - Serum                                     |     |
| <input type="checkbox"/> | <a href="#">CID19200000369</a> | InTransit     |             | 04/23/2020 08:06 am | 04/23/2020 | Test Health Unit | Blood - Serum                                     |     |
| <input type="checkbox"/> | <a href="#">CID19200000358</a> | InTransit     |             | 04/23/2020 06:12 am | 04/23/2020 | Test Health Unit |                                                   |     |
| <input type="checkbox"/> | <a href="#">CID19200000344</a> | InTransit     |             | 04/23/2020 03:18 am | 04/23/2020 | Test Health Unit |                                                   |     |
| <input type="checkbox"/> | <a href="#">CID19200000337</a> | InTransit     |             | 04/14/2020 10:57 pm | 04/22/2020 | Test Health Unit |                                                   |     |
| <input type="checkbox"/> | <a href="#">CID19200000336</a> | InTransit     |             | 04/14/2020 10:57 pm | 04/22/2020 | Test Health Unit |                                                   |     |
| <input type="checkbox"/> | <a href="#">CID19200000333</a> | InTransit     |             | 04/22/2020 04:41 pm | 04/22/2020 | Test Health Unit | Nasopharyngeal                                    |     |
| <input type="checkbox"/> | <a href="#">CID19200000332</a> | InTransit     |             | 04/22/2020 04:41 pm | 04/22/2020 | Test Health Unit | Nasopharyngeal / Oropharyngeal (Combination)      |     |
| <input type="checkbox"/> | <a href="#">CID19200000328</a> | InTransit     |             | 04/22/2020 04:20 pm | 04/22/2020 | Test Health Unit | Swab                                              |     |
| <input type="checkbox"/> | <a href="#">CID19200000326</a> | PendingReview |             | 04/22/2020 04:20 pm | 04/22/2020 | Test Health Unit | Nasopharyngeal / Oropharyngeal (Combination) Swab |     |
| <input type="checkbox"/> | <a href="#">CID19200000322</a> | InTransit     |             | 04/22/2020 11:56 am | 04/22/2020 | Test Health Unit | Swab                                              |     |
| <input type="checkbox"/> | <a href="#">CID19200000320</a> | InTransit     |             | 04/22/2020 09:45 am | 04/22/2020 | Test Health Unit | Swab                                              |     |
| <input type="checkbox"/> | <a href="#">CID19200000314</a> | InTransit     |             | 04/22/2020 08:37 am | 04/22/2020 | Test Health Unit | Swab                                              |     |
| <input type="checkbox"/> | <a href="#">CID19200000313</a> | InTransit     |             | 04/22/2020 02:10 am | 04/22/2020 | Test Health Unit | Nasopharyngeal                                    |     |
| <input type="checkbox"/> | <a href="#">CID19200000312</a> | InTransit     |             | 04/22/2020 01:06 am | 04/22/2020 | Test Health Unit | Nasopharyngeal                                    |     |

At the bottom of the table, there is an 'EXPORT' button and pagination information: 'Rows per page: 25' and '1-25 of 92'.