

# CLIENT PORTAL USER GUIDE

---

INTRODUCTION.....	3
General Information.....	3
Client Support Information.....	3
Client Portal Workflow .....	4
Client Portal Identifiers, Codes and Terms.....	4
Scheduled Maintenance.....	5
USER LOGIN .....	6
Getting Started .....	6
Label Printers .....	7
SSL Certificate Permission.....	7
Troubleshooting the Label Printer .....	8
Login Steps .....	9
Forgot Password .....	12
Change Password .....	13
Email Notification.....	13
E-Signature .....	15
ORDER ENTRY .....	18
Order Status – Summary Level .....	18
Order Status – Status Definitions .....	21
Order Status – Detail Level .....	22
Create an Order .....	23
Case Information .....	23
Add Samples.....	26
Add Testing .....	28
Multiple Cases.....	31
Order Review .....	32
LABELS.....	35
Setup Labels .....	35
Label Content.....	38
WORKFLOW – E-SIGNATURE .....	39
Case Assignment .....	39
Apply E-Signature .....	41
Default Email Setup.....	42
REPORTS.....	50
Report Options .....	50



View a Report.....	51
Print Multiple Reports .....	53
Change Report Status to Unread .....	55
Invoice Payment.....	56
Invoice Inquiry .....	56
TEST CATALOG .....	57
Searching the Test Catalog .....	57



## INTRODUCTION

### General Information

The Client Portal is an application in which authorized users may place orders and retrieve reports. User roles are assigned to individuals under an account by the NMS Client Support Team.

The Laboratory Reports provided in the Client Portal are in pdf format. The portal will allow the user to view and download reports.

A feature to assign an email notification is available. The email serves as an alert when new reports are available in the portal.

A Test Catalog tool is available to all users.

### Client Support Information

**Client Support Hours:** Monday through Friday 8:00am - 8:30pm ET

**Clinical & Research clients:** 1-866-522-2206 / [Clinical@nmslabs.com](mailto:Clinical@nmslabs.com)

**Forensic clients:** 1-866-522-2216 / [Forensics@nmslabs.com](mailto:Forensics@nmslabs.com)

**Expert Service clients:** 1-844-276-0768 / [expertservices@nmslabs.com](mailto:expertservices@nmslabs.com)

**Billing inquiries:** 1-800-522-6671 / [BillingTIQ@nmslabs.com](mailto:BillingTIQ@nmslabs.com)

**Crime Lab clients:** 1-844-276-1182 / [Crimelab@nmslabs.com](mailto:Crimelab@nmslabs.com)

**Mailing addresses:**

- **NMS Labs**, 200 Welsh Road, Horsham, PA 19044
- **NMS Labs Crime Lab**, 2300 Stratford Avenue, Willow Grove, PA 19090
- **NMS Labs Crime Lab DFW**, 2302 113th Street, Suite 200, Grand Prairie, TX 75050

## Client Portal Workflow

The Client Portal application is comprised of modules that allow users to order and receive results. Below is a general example of the Life Cycle within the Client Portal.

### ORDER ENTRY



### REPORT RETRIEVAL



## Client Portal Identifiers, Codes and Terms

Client Portal Identifiers	Definition
Accession	Unique number used to identify the Client Portal Case. Format: NMSCP-NNNN; Example: NMSCP2815 <ul style="list-style-type: none"> <li><b>N</b> = 4-Digit Unique Number</li> </ul> The unique number will increase after it reaches 9999.
Case ID/Incident Number	The Client's unique number used to identify a Laboratory Case.

Client Portal Identifiers	Definition
Requisition Type / Work ID	The type of work submitted. <ul style="list-style-type: none"> <li>• <b>Clinical</b></li> <li>• <b>Police</b></li> <li>• <b>Postmortem</b></li> <li>• <b>Other</b></li> </ul>
Sample	The Specimen being submitted to NMS Labs.
Requisition	A report with the information entered including the Patient Demographics, Case Information and Testing requested.

## Scheduled Maintenance

Scheduled portal maintenance is performed at the following times. It is recommended to exit the system during the maintenance window.

Description	Day	Time (EDT)	Duration (approx.)
Server Backup (SQL)	Sunday	3:00am	15 minutes
Server Backup (SQL)	Nightly	2:00am	10 minutes
Server Backup (IIS)	Sunday	2:00am	10 minutes
Server Backup (IIS)	Nightly	1:00am	10 minutes
SQL Backup	Nightly	8:00pm	5 minutes
Index Rebuild	Sunday	12:00am	5 minutes
Statistics	Sunday	1:00am	5 minutes
DBCC Check	Sunday	3:00am	5 minutes

In addition, announced downtimes will occur for upgrades and additional service activities. These announcements will appear on the portal login page.



## USER LOGIN

### Getting Started

#### Accessing the Client Portal

An email invite will be generated by the NMS Client Support department. Upon receipt of the email, click the link for the creation of a password.

#### Logging onto the Client Portal with Multi-Factor Authentication

Log onto the Client Portal using your email address and secure password. After entering your password, a Verification Code email will automatically be sent to your email address. The 6-digit verification code in the email can be entered in the 'Enter the code' field on the Verify Your Identity screen.

#### Client Portal Application Location

The Client Portal link is <https://portal.nmslabs.com>

The Client Portal is also located on the NMS website.

#### Session Lock-Out

Ten (10) subsequent incorrect attempts to logon using your User ID and Password will lock your user session. You can click the 'Forgot password?' link to receive a Password Reset email.

#### Session Time-Out

After 4 hours of inactivity, the Client Portal will log-out your session. You will be returned to the main logon window.

#### Web Browser

Do not use the web browser's back and forward buttons to navigate between application windows. Instead, use the tabs and the links provided within the application.

#### Security

It is always required to log out of the Client Portal application when you leave your workstation unattended. Any actions performed in the Client Portal under your logged-in user will be recorded as being executed by you, even if it was not. To protect yourself, remember to always log out of the Client Portal before moving away from your workstation.

## Exiting the Client Portal

To exit and close the Client Portal application, it is advised to use the Logout link located in the upper right section of the screen. This will return you to the main logon screen. You can then close the application by clicking on the X in the upper right section of the screen.

## Label Printers

- NMS recommends the Dymo® LabelWriter® 450 model label printer and 1" x 2 1/8" size labels. However, Dymo® LabelWriter® 550 and Dymo® LabelWriter® 5XL are also supported. Please ensure that you are using DYMO branded barcode label stock as any other brands may present issues with printing.
- Install the label printer using the CD provided with the printer or by following the URL: <https://www.dymo.com/support?cfid=user-guide>. Under the Latest Software & Drivers for all Label Writers and Label Manager section, click the **Download** for the DYMO Connect option for Desktop Windows.

## SSL Certificate Permission

**IMPORTANT:** For users with a Dymo® LabelWriter® 550 and Dymo® LabelWriter® 5XL, you will need the assistance of your IT organization to ensure that the users interacting with the client portal have full control rights to the DYMO Root CA SSL Certificate. Please consult your IT Administrator for details on how to do this. The following is a step-by-step process to accomplish this.

1. The Dymo Connect Web Service (which runs after the installation is complete) directly interacts with the Client Portal and requires that all users be added and have full control to the private key of the DYMO Root CA SSL Certificate.
2. Open the Management Console as an **ADMINISTRATOR**. You can do this by simply navigating to the windows icon, typing MMC and then selecting Run as Administrator.
3. Within the Console, navigate to the top tool bar and select File > Add/Remove Snap-In.
4. In the resulting window, locate the Certificates snap-in in the left grid. Click Add. If prompted, select Computer Account and then Local Computer. Otherwise, click OK.
5. In the left grid, under Console Root, expand Certificates > Personal > Certificates. In the center grid, locate the certificate issued by "DYMO Root CA (for localhost)". With the certificate selected, right-click on it and select All Tasks > Manage Private Keys.

6. In the resulting window, add the user or group of users to the Security grid. Please ensure you select the account which will be logged into the machine to print labels. That might be a shared account or a user account. In addition, using groups is highly recommended if more than one account will need to print labels.
7. Once added, please confirm (and or check the box) that they have Full Control and Read Permissions.
8. Once completed, you can close the Console. It is recommended that you restart the machine for the changes to take effect.

Browsers that support the Dymo® label printer:

- On Windows: Internet Explorer 6+, Firefox 2+, Chrome 4, Opera 10, Safari
- On Mac: Safari 4+, Firefox, Chrome, Opera.
- If using Firefox 2+ please ensure that the certificate is present:

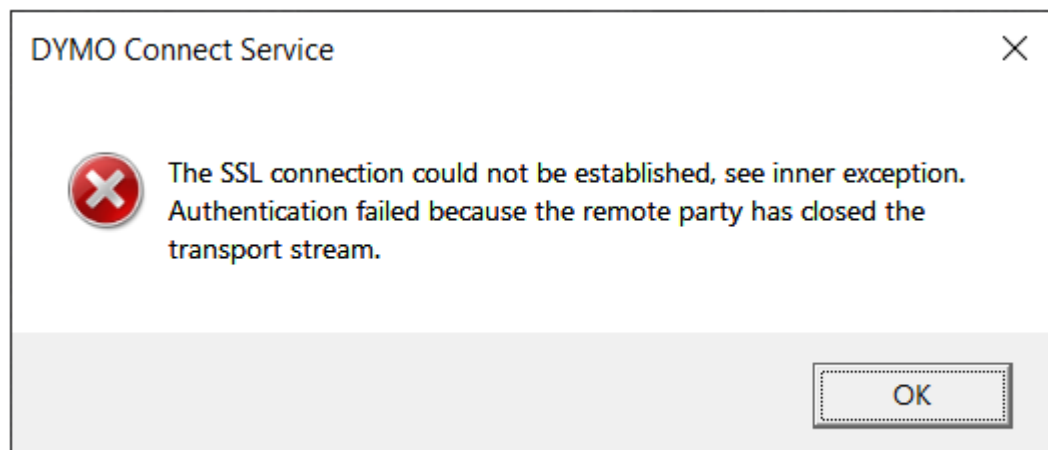
<https://localhost:41951/DYMO/DLS/Printing/Check>

To permanently save the cert, please turn off "Never remember history" in Options > Privacy & Security tab.

**Important:** When accepting the cert, make sure the "Permanently store this exception" checkbox is checked.

## Troubleshooting the Label Printer

- Start by checking the Dymo Web Service in the Task Tray. Right click and select Diagnose. You should receive a connection successful. If not, and you receive the following:



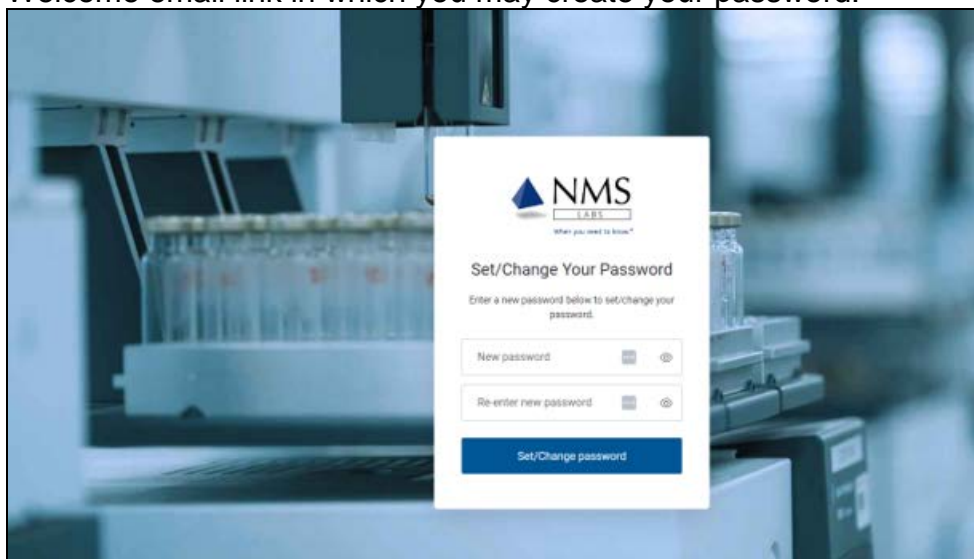
Then please complete the steps under the SSL Certificate Permission section.



- Gather some information so that NMS Labs can further troubleshoot. Navigate to the following: [portal.nmslabs.com/home/labelprinterhelp](https://portal.nmslabs.com/home/labelprinterhelp). After running, this should display some information on the screen. Please submit a screen capture to NMS for further assistance.

## Login Steps

For new Client Portal users, the NMS Client Support team will activate your user and send a Welcome email link in which you may create your password.

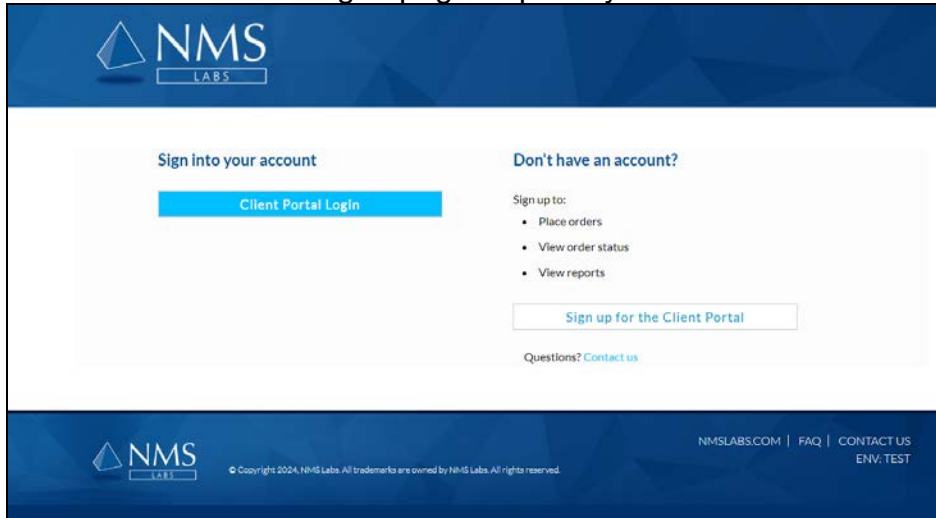


A password must contain:

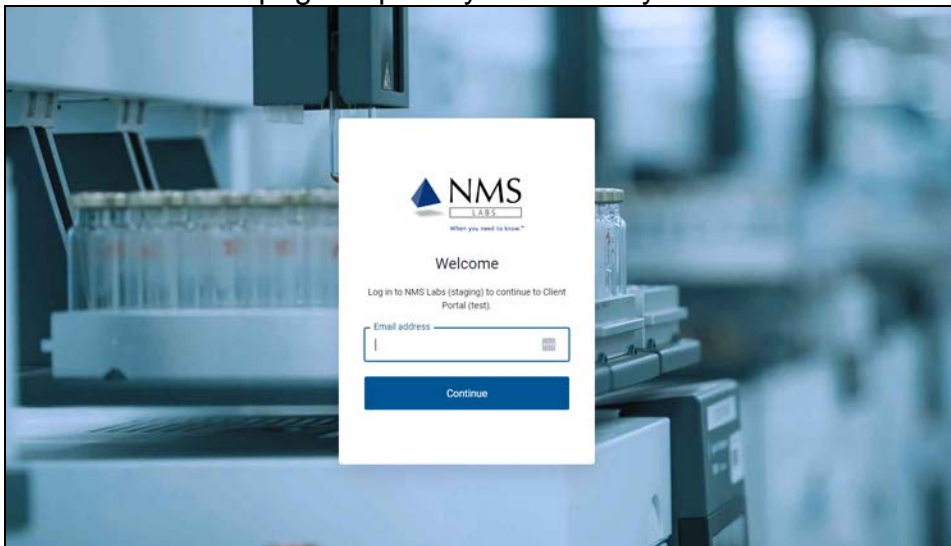
- At least 15 characters
- At least 3 of the following:
  - Lower case letters (a-z)
  - Upper case letters (A-Z)
  - Numbers (0-9)
  - Special characters (e.g. !@#\$%^&\*)

Once a user has an email address and password, you may log onto the Client Portal.

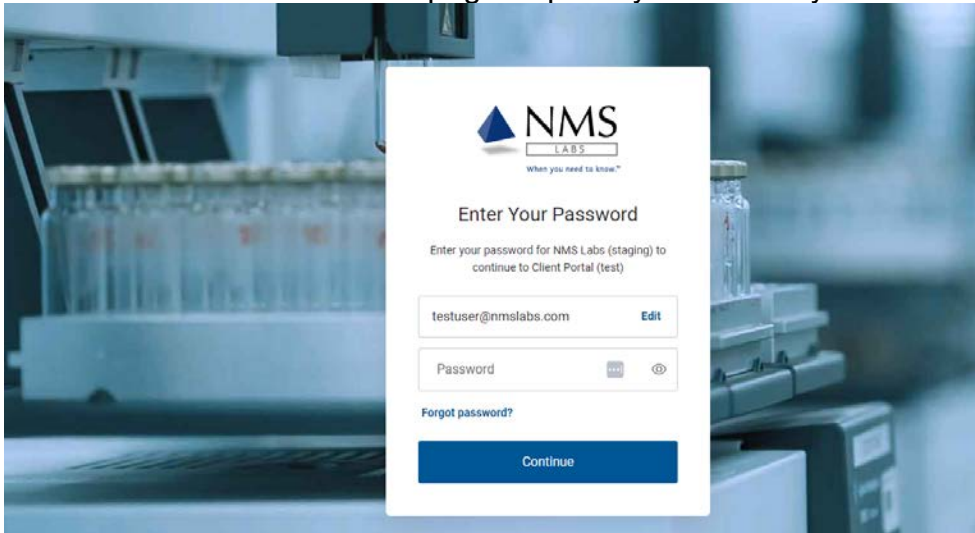
1. The Client Portal Logon page requires you to click the blue Client Portal Login button.



2. The Welcome page requires you to enter your Email address and click Continue.

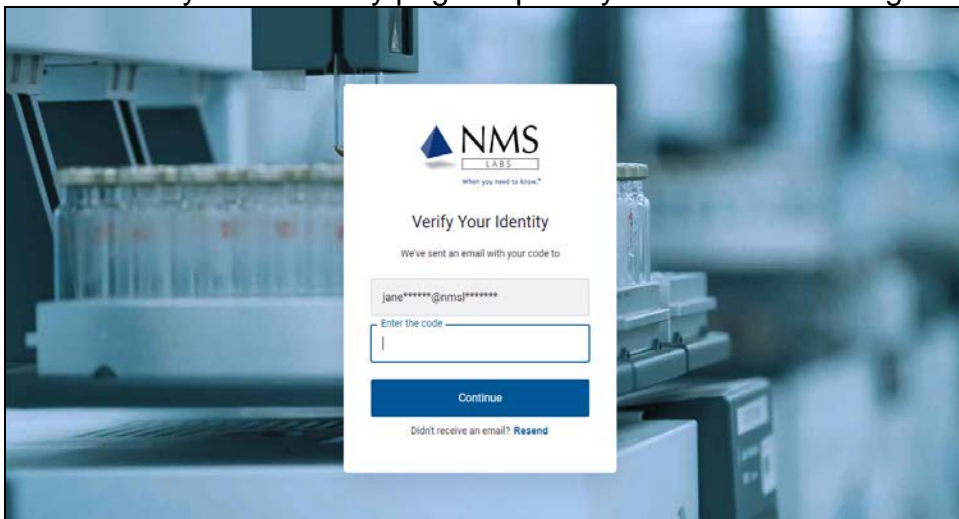


3. The Enter Your Password page requires you to enter your Password and click Continue.



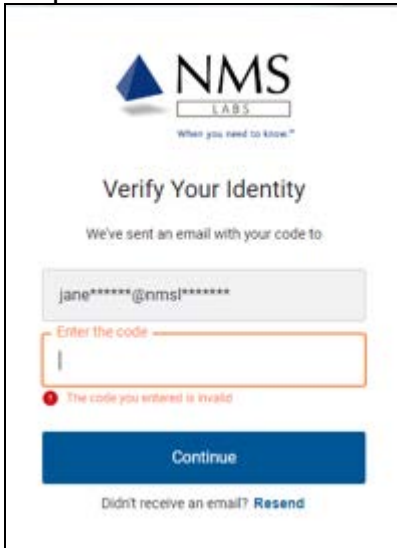
4. You will receive a Verification Code email containing a 6-digit verification code that is valid for 5 minutes.

5. The Verify Your Identity page requires you to enter the 6-digit verification code.



6. The user will be successfully logged in if the verification code is valid.

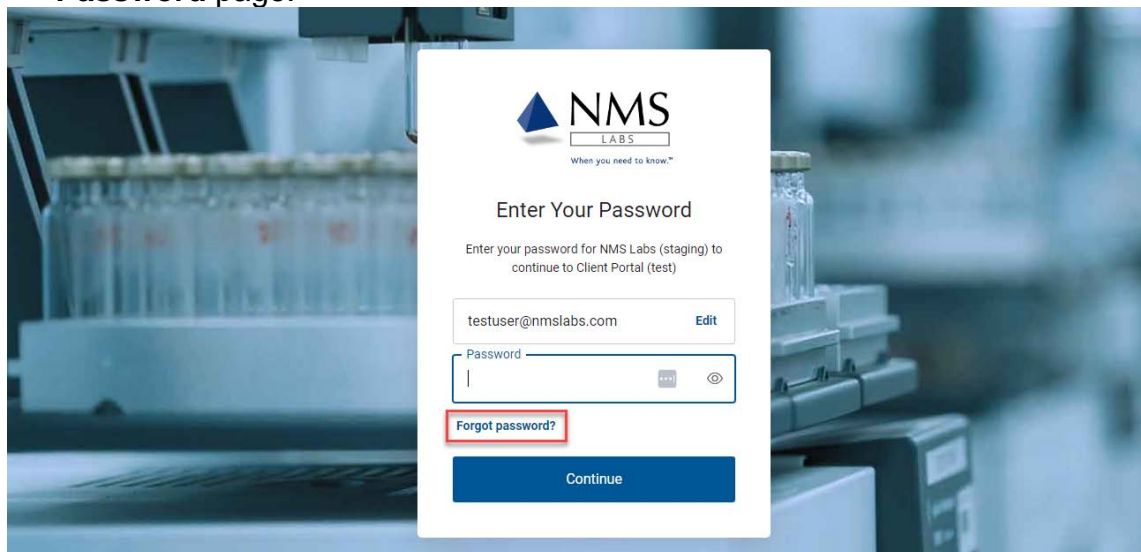
- The user will not be logged in if the verification code is invalid. The verification code could be invalid if it was entered incorrectly, or if it was entered after the 5 minute expiration period.



**NOTE:** You can click the Resend link to receive a new Verification Code email.

## Forgot Password

- If you forget your password, click the **Forgot password?** link on the **Enter Your Password** page.



2. A Password Reset email will generate for the creation of a new password.

## Change Password

1. If a user wants to change the password, click on **My Account**, which is in the upper right corner of your screen.



2. Click the blue **Send me a password reset email** button.

## Manage Account

Custom Settings: [ [Update Settings](#) ]

Password:

[Send me a password reset email](#)

3. You can confirm you would like to reset your password.
4. A Password Reset email will generate for the creation of a new password.

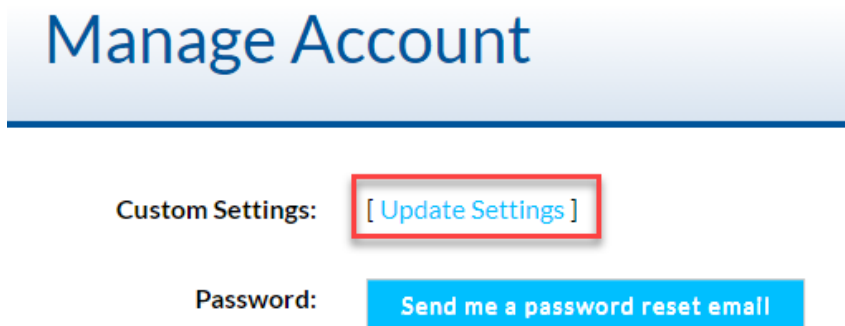
## Email Notification

An email notification for when reports are available is configurable per each user's setup.

1. Click **My Account** in the upper right corner of your screen.



2. Click **Update Settings**.



3. Select which status options that you would like to receive email notifications.

### Email Notification

The NMS labs portal sends incremental notifications when you receive new documents, or status of your orders changes. Each notification will include all changes from the last notification, no matter which frequency you set. Please use the settings below to customize the content and frequency of your email notifications.

Report groups you have access to:

- Results
- Litigation
- Finance

Choose the order status options on which you'd like to receive notifications

☐ All ☐ Canceled ☐ In Progress ☐ In Review ☐ No Report ☐ Pending Receipt ☐ Received ☐ Reported

4. Select the **day(s)** that you would like to receive email notifications.  
Note: The email delivery is Eastern Standard Time.


Choose the days of the week on which you'd like to receive notifications

- ☐ Always Notify Me
- ☐ Sunday ☒ Monday ☒ Tuesday ☐ Wednesday ☒ Thursday ☐ Friday ☐ Saturday

Note: Always Notify Me can be selected for hourly daily email notifications.

5. Select the **time(s)** that you would like to receive email notifications.

Select the time(s) at which you'd like to receive notifications on the days you selected above



Add Time

6. Click **Add Time**.

Select the time(s) at which you'd like to receive notifications on the days you selected above




Add Time

7. Click **Save Settings**.

Notification Time(s)

Based on Eastern/New York Time Zone

 08:00 AM

Save Settings

Cancel

## E-Signature

Depending upon your configuration, the following is information for adding your electronic signature for upload onto the final report. Contact Client Services if you have additional questions about this service.

1. Click **My Account** located in the upper right corner of your screen.





## 2. Click **Update Electronic Signature**

Custom Settings: [\[ Update Settings \]](#)

Electronic Signature: [\[ Update Electronic Signature \]](#)

Password: [Send me a password reset email](#)

## 3. Enter the credentials to appear below the signature and click **Save Information**

### Signature Information

Name

First Name Last Name, M.S., D-ABFT-FT

Title

Forensic Toxicologist

Employer

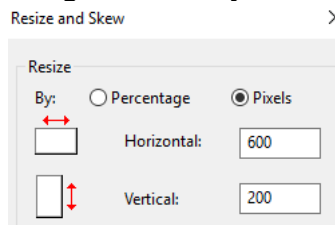
City and County of Bucks

[Save Information](#)

## 4. If you have an image of the electronic signature you may click Browse and Upload Signature

Note: The image must be Height 200 x Width 600

*Hint: When you right click on your image there is an option to adjust the pixel size*





### Upload a new Electronic Signature

Browse...

- Upload image dimensions must be exactly Height 200px, Width 600px.

Upload Signature

5. The **Create a new Electronic Signature** option allows the user to use the mouse for signing. Click **Save Signature**.

### Create a new Electronic Signature



Save Signature

Reset Signature

## ORDER ENTRY

All users will open the client portal to the **Order Status** page. Additional access and tabs will appear depending upon the user's access authorization.

Authorized users will have access to an **Orders** tab upon logging into Client Portal.

If authorized, the user will also have **Order Entry** access to place electronic orders prior to sending the samples to NMS Labs.

## Order Status – Summary Level

1. The user will default to the Order Status Page. This page shows the status of all submissions associated to accounts the user can access. This initial display is the summary level information.

### Orders

CART
IN PROCESS
ALL
**ORDER STATUS**
New Case

Export to Excel
Export to Excel (Detail)
Save Layout
Reset Layout
Clear Filters
30 Days

	Client Account ↑	Name	Work Order	Receipt Date ↓	Work ID ↑	Status	Updated Date
▶	(88888) ABC Example Customer N...	DOE, JANE	23001171	07/20/2023	TEST1	Received	07/20/2023
▶	(88888) ABC Example Customer N...	DOE, JOHN	23001172	07/20/2023	TEST2	In Progress	07/20/2023
▶	(88888) ABC Example Customer N...	DOE, JOHN M	23001173	07/20/2023	TEST3	In Progress	07/20/2023
▶	(88888) ABC Example Customer N...	DOE, MARY	23001174	07/20/2023	TEST4	In Review	07/20/2023
▶	(88888) ABC Example Customer N...	DOE, JANE E	23001175	07/20/2023	TEST5	Received	07/20/2023
▶	(88888) ABC Example Customer N...	DOE, JANE	23001170	07/19/2023	TC31	Reported	07/19/2023
▶	(88888) ABC Example Customer N...	Not Provided	23001169	07/19/2023	TC40	Canceled	07/19/2023

2. The order status page is initially sorted by Client Account (ascending), Receipt Date (descending), then Work ID (ascending).
3. The user may customize the grid layout.
  - a. Click on the ellipsis and select the columns to display.
  - b. Rearrange the columns by a drag and drop method.
  - c. Sort and resize the columns.

4. Click **Save Layout** to save the grid settings.

Orders Search Orders

CART IN PROCESS ALL **ORDER STATUS** New Case

Export to Excel Export to Excel (Detail) **Save Layout** Reset Layout Clear Filters 30 Days

Client Account ↑	Name	Work Order	Receipt Date ↓	Work ID ↑	Status	Updated Date
▶ (88888) ABC Example Customer N...	DOE, JANE	23001171	07/20/2023	TEST1	Received	07/20/2023
▶ (88888) ABC Example Customer N...	DOE, JOHN	23001172	07/20/2023	TEST2	In Progress	07/20/2023
▶ (88888) ABC Example Customer N...	DOE, JOHN M	23001173	07/20/2023	TEST3	In Progress	07/20/2023
▶ (88888) ABC Example Customer N...	DOE, MARY	23001174	07/20/2023	TEST4	In Review	07/20/2023
▶ (88888) ABC Example Customer N...	DOE, JANE E	23001175	07/20/2023	TEST5	Received	07/20/2023
▶ (88888) ABC Example Customer N...	DOE, JANE	23001170	07/19/2023	TC31	Reported	07/19/2023
▶ (88888) ABC Example Customer N...	Not Provided	23001169	07/19/2023	TC40	Canceled	07/19/2023

5. To return to a default view, click **Reset Layout**, and **Save Layout**.

Orders Search Orders

CART IN PROCESS ALL **ORDER STATUS** New Case

Export to Excel Export to Excel (Detail) **Save Layout** **Reset Layout** Clear Filters 30 Days

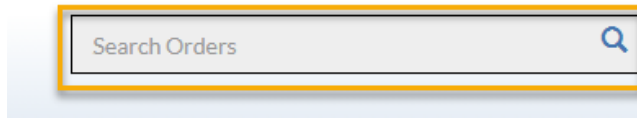
Client Account ↑	Name	Work Order	Receipt Date ↓	Work ID ↑	Status	Updated Date
▶ (88888) ABC Example Customer N...	DOE, JANE	23001171	07/20/2023	TEST1	Received	07/20/2023
▶ (88888) ABC Example Customer N...	DOE, JOHN	23001172	07/20/2023	TEST2	In Progress	07/20/2023
▶ (88888) ABC Example Customer N...	DOE, JOHN M	23001173	07/20/2023	TEST3	In Progress	07/20/2023
▶ (88888) ABC Example Customer N...	DOE, MARY	23001174	07/20/2023	TEST4	In Review	07/20/2023
▶ (88888) ABC Example Customer N...	DOE, JANE E	23001175	07/20/2023	TEST5	Received	07/20/2023
▶ (88888) ABC Example Customer N...	DOE, JANE	23001170	07/19/2023	TC31	Reported	07/19/2023
▶ (88888) ABC Example Customer N...	Not Provided	23001169	07/19/2023	TC40	Canceled	07/19/2023

6. Each column allows a filter option by clicking on the ellipsis.

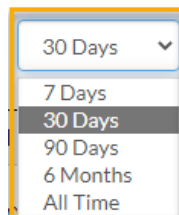
Filter menu for Status column:

- ↑ Sort Ascending
- ↓ Sort Descending
- Columns
- Filter**
  - Show Items with value that:
  - Is equal to
  - Filter
  - Clear

7. The global search option allows the user to perform a broader grid search.



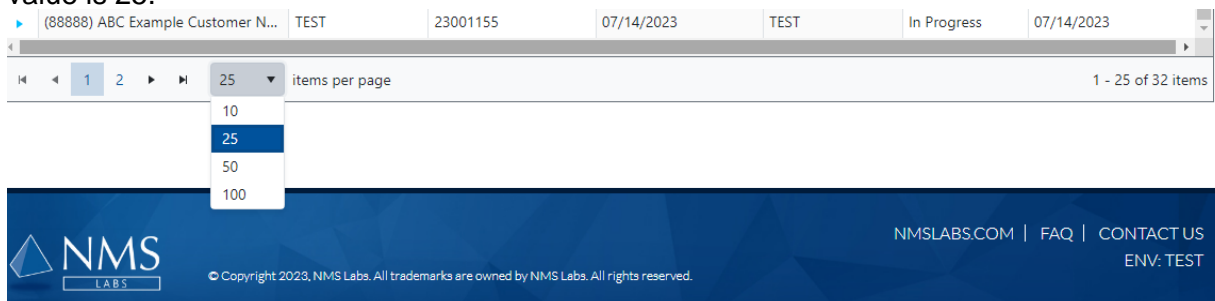
8. The grid will default to the last 30 days of information, but the user can control the amount of information displayed.



9. The user can click the 'Export to Excel' for summary level grid information or click the 'Export to Excel (Detail)' for sample and test level grid information for further use outside of the portal as needed.



10. The user can adjust the number of items per page from the bottom of the screen. The default value is 25.



## Order Status – Status Definitions

Note: Hover over a status to see a tool tip with the status definition.

1. Pending Receipt = An electronic order has been placed; the sample(s) are pending receipt. Because the sample is still being shipped the NMS workorder and receipt date are blank.

Client Account	Name	Work Order	Receipt...	Work ID	Status	Updated ...
▶ (88888) ABC Example Cust...	DOE, JOHN	--	--	20230321-01	Pending Receipt	04/13/2023

2. Received = The sample(s) have been received.

Client Account	Name	Work Order	Receipt...	Work ID	Status	Updated ...
▶ (88888) ABC Example Cust...	DOE, JOHN G	23000121	02/10/2023	CP1-1A	Received	02/23/2023

3. In Progress = The testing is in progress.

Client Account	Name	Work Order	Receipt...	Work ID	Status	Updated ...
▶ (88888) ABC Example Cust...	DOE, JOHN	23000170	02/20/2023	CP1-117	In Progress	02/23/2023

4. In Review = The results are in review.

Client Account	Name	Work Order	Receipt...	Work ID	Status	Updated ...
▶ (88888) ABC Example Cust...	DOE, JOHN	23000186	02/27/2023	TEST	In Review	03/01/2023

5. Reported = The user can click on the status hyperlink to open the report.

Client Account	Name	Work Order	Receipt...	Work ID	Status	Updated ...
▶ (88888) ABC Example Cust...	Not Provided	23000144	02/12/2023	CP1-48	Reported	02/23/2023

6. No Report = No report issued.

Client Account	Name	Work Order	Receipt...	Work ID	Status	Updated ...
▶ (88888) ABC Example Cust...	DOE, JASON	23000233	03/05/2023	CP2-33	No Report	03/06/2023

7. Canceled = The testing has been canceled. See final report for details. The user can click on the status hyperlink to open the document.

Client Account	Name	Work Order	Receipt...	Work ID	Status	Updated ...
▶ (88888) ABC Example Cust...	DOE, JOHN	23000120	02/10/2023	CP1-14	Canceled	04/17/2023

## Order Status – Detail Level

- Once an order is received, the detail level information is available for review. Click on the arrow next to the client account to expand the detail level section.

▼	(88888) ABC Example Customer N...	DOE, JANE	23001171	07/20/2023	TEST1	Received	07/20/2023
Lab ID	Test Code	Test Name	Collection Date	Order Date			
23001171-001	0030B	Acetaminophen, Blood	07/19/2023 10:34	07/20/2023			
23001171-002	1789B	Diquat, Blood	07/19/2023 10:35	07/20/2023			
23001171-002	4450B	Thiopental and Metabolite, Blood	07/19/2023 10:35	07/20/2023			
23001171-003	1864B	Drugs of Abuse Screen (11 Panel), Blood	07/19/2023 10:35	07/20/2023			
23001171-004	0960ME	Cannabinoids Panel (Qualitative), Meconium	07/19/2023 10:36	07/20/2023			
23001171-005	STORE	No testing-store container	07/19/2023 10:36	07/20/2023			

- The detail section lists the samples, tests, collection, and order dates. If a sample is received but no testing is performed, it is marked for storage (STORE).

▼	(88888) ABC Example Customer N...	DOE, JANE	23001171	07/20/2023	TEST1	Received	07/20/2023
Lab ID	Test Code	Test Name	Collection Date	Order Date			
23001171-001	0030B	Acetaminophen, Blood	07/19/2023 10:34	07/20/2023			
23001171-002	1789B	Diquat, Blood	07/19/2023 10:35	07/20/2023			
23001171-002	4450B	Thiopental and Metabolite, Blood	07/19/2023 10:35	07/20/2023			
23001171-003	1864B	Drugs of Abuse Screen (11 Panel), Blood	07/19/2023 10:35	07/20/2023			
23001171-004	0960ME	Cannabinoids Panel (Qualitative), Meconium	07/19/2023 10:36	07/20/2023			
23001171-005	STORE	No testing-store container	07/19/2023 10:36	07/20/2023			

- If a collection date is not supplied, the field is marked as blank.

▼	(88888) ABC Example Customer N...	SMITH, JANE	23000949	06/05/2023	Test631	In Review	06/05/2023
Lab ID	Test Code	Test Name	Collection Date	Order Date			
23000949-001	1300B	Cocaine and Metabolites, Blood	--	06/05/2023			
23000949-002	1864B	Drugs of Abuse Screen (11 Panel), Blood	--	06/05/2023			

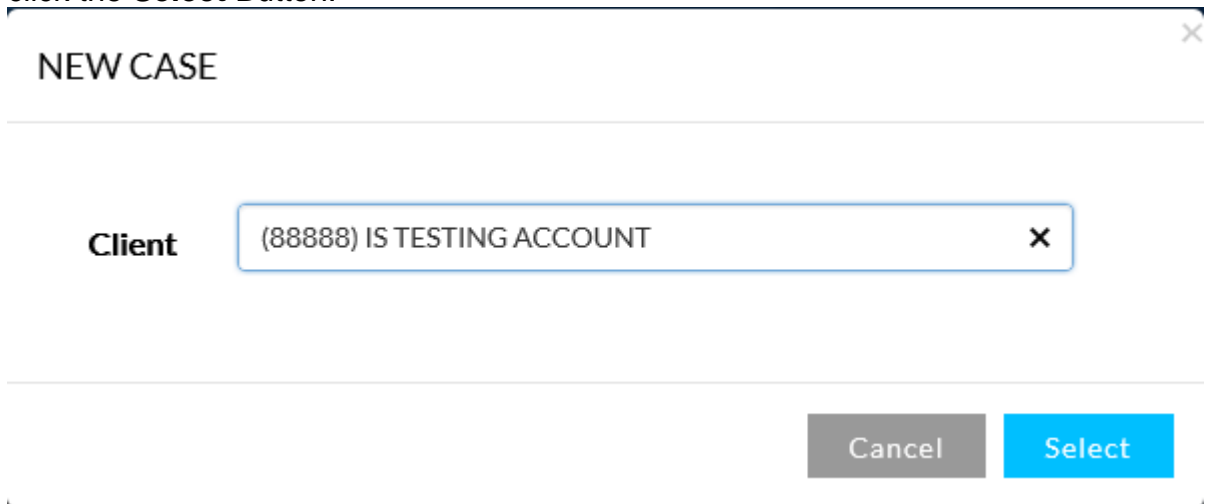
## Create an Order

1. From the Orders Screen Click the **New Case** button.



The screenshot shows the 'Orders' section of the client portal. At the top, there's a search bar labeled 'Search Orders'. Below it, there are three tabs: 'CART', 'IN PROCESS', and 'ALL'. On the right side, there is a blue button labeled 'New Case' which is highlighted with a red rectangular box.

2. A new tab opens. Select the account number that you wish to place an order for and click the **Select** Button.



The screenshot shows a 'NEW CASE' modal window. It has a title bar with a close button. Below the title, there is a 'Client' label followed by a text input field containing '(88888) IS TESTING ACCOUNT' and a clear button (X). At the bottom right, there are two buttons: 'Cancel' and 'Select'. The 'Select' button is highlighted with a blue background.

## Case Information

1. The **Case Info** window opens with a **Requisition Type** option.
  - The **Requisition Type** will default to the type of work that your account would typically send for testing.
  - If a different type of service is required, i.e., **Clinical, Postmortem or Police** then click the Drop Down option to change the selection.

## Case Info

Accession NMSCP2818

Requisition Type POSTMORTEM

2. The **Demographic** section contains the Patient identifying items related to the case.
- **Case ID** – The client's identification number for this submission.
  - **First Name** – The First Name of the Decedent, Suspect or Patient.
  - **Middle Initial** – The Middle Initial of the Decedent, Suspect or Patient.
  - **Last Name** – The Last Name of the Decedent, Suspect or Patient. (Required)
    - If the Last Name is unknown enter 'NP' for 'Not Provided'
  - **Labeled As** – A concatenation of the Last Name, First Name and Middle initial. The field is truncated to meet the label field length requirements.

Case ID	<input type="text"/>	
First Name	<input type="text"/>	
Middle Initial	<input type="text"/>	
Last Name	<input type="text"/>	*
Labeled As	<input type="text" value="NP"/>	
DOB	<input type="text"/>	
Sex	<input type="text" value="Select Sex"/>	



- The **Requisition** section contains questions specific to the type of requisition. i.e., Postmortem vs. Police. After entering the Requisition questions click **Next**.

**Postmortem** requisition questions:

**Note: Please enter the Autopsy ID only if it differs from the Case ID.**

### Requisition


Manner of Death	<input type="text" value="Please Select"/>	▼
Specimen Condition	<input type="text" value="Please Select"/>	▼
If Specimen Condition is 'OTHER'	<input type="text"/>	
Case History	<input type="text"/>	
Known Medications	<input type="text"/>	
Autopsy ID	<input type="text"/>	📄
Alternate Case ID	<input type="text"/>	📄
County	<input type="text"/>	📄
Physician/Pathologist Name	<input type="text"/>	📄
Special Instructions	<input type="text"/>	

- The page 📄 icon indicates the values are included on the final report.

## Police requisition questions:

### Requisition

Officer's Name	<input type="text"/>	* 
Department Jurisdiction (County)	<input type="text"/>	* 
Known Medications	<input type="text"/>	
Case History	<input type="text"/>	
Alternate Case ID	<input type="text"/>	
Special Instructions	<input type="text"/>	




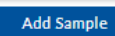
- The page  icon indicates the values are included on the final report.
- The asterisk \* icon indicates the value is required.


## Add Samples

- The **Add Samples** window opens.
  - Select the Matrix Type. (Required)
  - Select the Matrix Source if it is available.
  - Enter the Collection Date/Time if it is available.
  - Click <Add Sample>



Important! Please ensure the collection date/time entered is correct for each sample submitted.

### Add Samples

ACCESSION NO. NMSCP3983	INCIDENT NUMBER NP	LABELED AS TEST, PATIENT A
Blood 	Abdominal 	12/13/2022 13:00  


- Click the  button to duplicate samples with the same Matrix, Matrix Source and Collection Time.
















### Sample(s)

Sample 1	Blood   Abdominal   12/17/2018 13:30	  
----------	--------------------------------------	---

---

Cancel
Back
Next







- Click the  button to delete a sample.

Sample 1	Blood   Abdominal   12/17/2018 13:30	  
Sample 2	Blood   Abdominal   12/17/2018 13:30	  
Sample 3	Blood   Abdominal   12/17/2018 13:30	  
Sample 4	Blood   Abdominal   12/17/2018 13:30	  
Sample 5	Blood   Abdominal   12/17/2018 13:30	  

---

Cancel
Back
Next

- Click the  button to edit a sample.

Sample 1	Blood   Abdominal   12/17/2018 13:30	  
Sample 2	Serum or Plasma   N/A   12/17/2018 13:30	  

---

Cancel
Back
Next

## Add Testing

1. **Add Favorite Test** – This is a quick selection of a frequently ordered test.  
 Note: If you would like additional tests added to this quick link please contact the NMS Client Support Department.

### Add Testing

ACCESSION NO. NMSCP3983	INCIDENT NUMBER NP	LABELED AS TEST, PATIENT A
----------------------------	-----------------------	-------------------------------

Please add testing to your case.

---

Add Favorite Test

Search Test Catalog

---

Cancel
 Back
 Add to Cart

2. **Search Test Catalog** – This option allows a search by test code, test description and synonym.

---

Add Favorite Test

Search Test Catalog

---

Cancel
 Back
 Add to Cart

















3. For additional information related to the test, click the **i** (information) button.

#### Searched Tests

4177B	Postmortem, SIDS Screen, Blood (Forensic)	 
8041B	Postmortem, Basic w/Vitreous Alcohol Confirmation, Blood (Forensic)	 
8042B	Postmortem, Expanded w/Vitreous Alcohol Confirmation, Blood (Forensic)	 
8043B	Postmortem, Expert w/Vitreous Alcohol Confirmation, Blood (Forensic)	 
8051B	Postmortem, Basic, Blood (Forensic)	 
8051SP	Postmortem, Basic, Serum/Plasma (Forensic)	 
8052B	Postmortem, Expanded, Blood (Forensic)	 
8052SP	Postmortem, Expanded, Serum/Plasma (Forensic)	 

4. To begin the process of adding a Test select the **+** button.

#### Searched Tests

4177B	Postmortem, SIDS Screen, Blood (Forensic)	 
8041B	Postmortem, Basic w/Vitreous Alcohol Confirmation, Blood (Forensic)	 
8042B	Postmortem, Expanded w/Vitreous Alcohol Confirmation, Blood (Forensic)	 
8043B	Postmortem, Expert w/Vitreous Alcohol Confirmation, Blood (Forensic)	 
8051B	Postmortem, Basic, Blood (Forensic)	 
8051SP	Postmortem, Basic, Serum/Plasma (Forensic)	 
8052B	Postmortem, Expanded, Blood (Forensic)	 
8052SP	Postmortem, Expanded, Serum/Plasma (Forensic)	 

5. To Add a test to a specific sample click 'Add' next to the Sample.

**4177B - Postmortem, SIDS Screen, Blood (Forensic)**
×

---

Blood   Abdominal   12/17/2018 13:30	<b>Add</b>
Blood   Abdominal   12/16/2018 13:30	<b>Add</b>

---

Cancel
Add to any sample

6. If you do not wish to add the test directly to a sample then click the 'Add to any sample' option.
- Note this option will allow NMS to determine which sample to run the testing on.

**4177B - Postmortem, SIDS Screen, Blood (Forensic)**
×

---



Blood   Abdominal   12/17/2018 13:30	<b>Add</b>
Blood   Abdominal   12/16/2018 13:30	<b>Add</b>

---

Cancel
**Add to any sample**

7. The tests added will appear under the **Test(s)** section. When you have completed adding the tests for this sample click the **Add to Cart** button.
- Note: To remove the test click the **x** located to the right of the Test Description.

### Test(s)

4177B	Blood   Abdominal   12/17/2018 13:30	
8051B	Any Sample	

## Multiple Cases

You may have many cases on an order, or you may have one case per order.

- After clicking **Add to Cart** from the Add Testing page, the **Orders** window will open.
  - The **Cart** reflects how many cases are on the order.

### Orders

<div> <div>CART <span>1</span></div> <div>IN PROCESS</div> <div>ALL</div> </div> <div>New Case</div>			
CLIENT (88888) IS TESTING ACCOUNT			
NMSCP3092			<div>Edit</div> <div>Delete</div>
201812	TEST, PATIENT	N/A	N/A
<div>Review</div>			

- Click the New Case button to add another case to the order.
  - The **New Case** button will begin the workflow for adding the second case's Patient Demographic, Samples, and test codes.

## Orders

CART 1
IN PROCESS
ALL
New Case

CLIENT  
(88888) IS TESTING ACCOUNT

NMSCP3092

EditDelete

201812	TEST, PATIENT	N/A	N/A
--------	---------------	-----	-----

Review

- When all Case and Sample information have been entered click the **Review** Button.

## Orders

CART 1
IN PROCESS
ALL
New Case

CLIENT  
(88888) IS TESTING ACCOUNT

NMSCP3092

EditDelete

201812	TEST, PATIENT	N/A	N/A
--------	---------------	-----	-----

Review

## Order Review

- After clicking **Review** from the Orders page, the **Order Review** window will open.
  - The Review screen is the last opportunity to make modifications to the order.
- To Edit Information on the Case, click the **Edit Case** button.
- The Submit for Testing button will send the order electronically to NMS Labs.
  - The Requisition will auto-generate.



NMSCP3983 - TEST, PATIENT A
 ▼

Client Profile:	(88888) ABC Example Customer Name	Ordered By:	Evelyn Burke
Incident Number	NP	Requisition Type:	POLICE

Last Name:	TEST	First Name:	PATIENT	Middle Initial:	A
Labeled As:	PATIENT A TEST	DOB:	N/A	Sex:	N/A

**Testing**

Test:	8104B - Postmortem, Fire Death Screen, Blood (Forensic)	Sample:	Any Sample
Test:	1300B - Cocaine and Metabolites, Blood	Sample:	Blood   Abdominal   12/13/2022 13:00

**Sample(s)**

Matrix:	Blood	Source:	Abdominal	Collected:	12/13/2022 13:00
Matrix:	Blood	Source:	Abdominal	Collected:	12/12/2022 13:00

**Case Questions**  
 No Case Questions Found.

**Requisition Questions**

Officer's Name:	TEST
Department Jurisdiction (County):	TESTS
Known Medications:	
Case History:	
Alternate Case ID:	
Special Instructions:	

Edit Case

[Go Back](#)
[Submit for Testing](#)

1:35:35 PM 12/15/2022

**Important: If modifications are required after Submit for Testing button is clicked please contact the Client Services department.**

- The Requisition will auto-generate and labels will auto-print if configured as so.
  - An option to reprint the Requisition, Labels or to view the Order History is available upon completion.

## Order Completed

Your Order has been submitted. If you would like to make modifications, please contact [Client Support](#) for assistance.

[Print Requisitions](#)
[Print Labels](#)
[Order History](#)



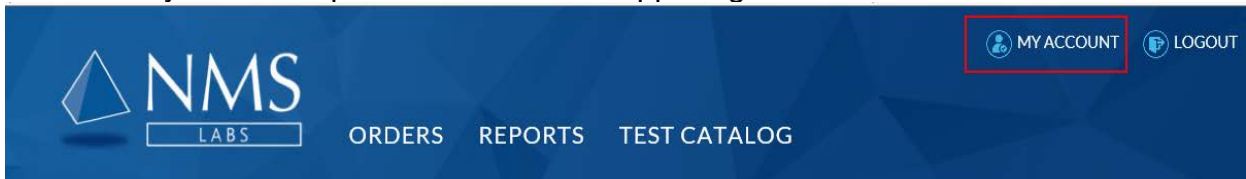
- A second option to reprint the Requisition, Labels or to view the Order History is available in the Order Details.

<b>ORDER PLACED</b> December 15, 2022		<b>CLIENT</b> (88888) ABC Example Customer Name	<b>SUBMITTED BY</b> Evelyn Burke	<b>ORDER: 2677</b> <a href="#">Order Details</a>
<b>NMSCP3983 - CREATED</b>				<a href="#">Case Details</a>
NP	TEST, PATIENT A	N/A	N/A	<a href="#">Print Labels</a>
<a href="#">Print Packing List</a>	<a href="#">Print Requisitions</a>	<a href="#">Print Labels</a>		

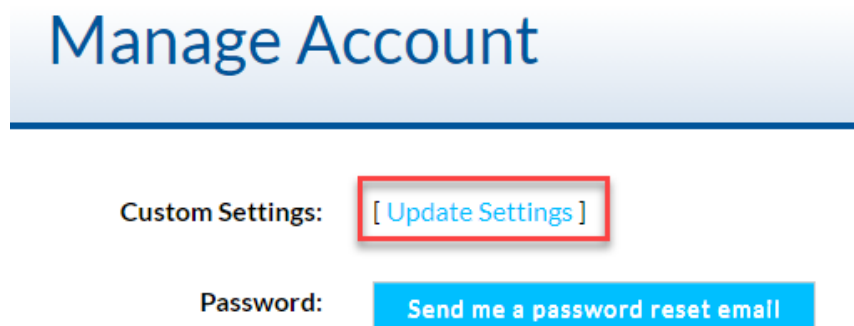
## LABELS

### Setup Labels

1. Click the My Account option located on the upper right side of the screen.



2. On the Manage Account screen, click **Update Settings**



3. Select the Label Auto Print option
  - None – The labels are available for manual printing.
  - Order Complete – The label will print upon submission of an order.
  - Sample Complete – The labels will auto-print with the completion of each sample entry.

## Account Settings

### Label Printer

**Label Auto Print**

OrderComplete

**Label Print Count**

1

**Default Printer**

---Select Printer---



4. Enter the number of labels to print in the **Label Print Count** field.

## Account Settings

### Label Printer

**Label Auto Print**

OrderComplete

**Label Print Count**

1

**Default Printer**

---Select Printer---



5. Select the Default Printer

- NMS recommends use of the Dymo® LabelWriter® 450 model label printer and 1" x 2 1/8" size labels.
- Browsers that support the Dymo® label printer:
  - On Windows: Internet Explorer 6+, Firefox 2+, Chrome 4, Opera 10, Safari
  - On Mac: Safari 4+, Firefox, Chrome, Opera.
  - If using Firefox 2+ please ensure that the certificate is present:  
<https://localhost:41951/DYMO/DLS/Printing/Check>

- Install the label printer:



Follow the URL:

<http://www.dymo.com/en-US/online-support/dymo-user-guides>

- Click the **Download** option under the Latest Software & Drivers.

The Latest Software & Drivers for all LabelWriters® and LabelManager®

Support all with all 450 series/4XL, 550 series/5XL and LabelManagers



#### Mac

DYMO Connect for Desktop macOS v1.4.3

\*compatibility starts from macOS 10.15 to higher.

Download



#### Windows

DYMO Connect for Desktop Windows v1.4.3

\*compatibility starts from Windows OS 8.1 to higher.

Download

- After the installation is complete select the **DYMO LabelWriter 450** from the Default Printer field.

Note: Recommend installing the DYMO version **8.7.3 or later**.

The newest version of the software can be found here:

<http://download.dymo.com/dymo/Software/Win/DLS8Setup.8.7.3.exe>

## Account Settings

### Label Printer

Label Auto Print

OrderComplete



Label Print Count

1

Default Printer

DYMO LabelWriter 450



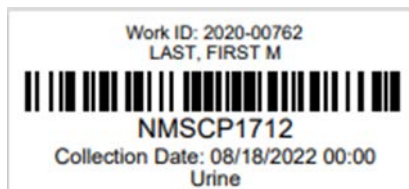
6. Click **Save Settings**.

 Save Settings Cancel

## Label Content

The following information is displayed on the Client Portal Label:

- Work ID
- Patient Name
- Bar Code
- Client Portal Unique Identifier
- Collection Date/time
- Matrix & Specimen Source

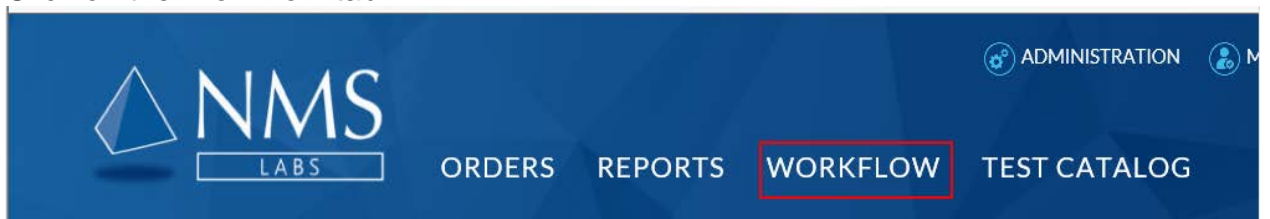


## WORKFLOW – E-SIGNATURE






Authorized users will have access to a **Workflow** tab upon logging into the Client Portal.  
 Note: This is a special tox workflow setup for specific accounts. Please reach out to your Sales Manager or Client Support representative for additional information.

### Case Assignment

1. Click on the **Workflow** tab.



2. Click the **Report Details** icon.

Workflow						
<div> <div>UNASSIGNED</div> <div>MY WORK</div> <div>ALL</div> </div> <div>Search Workflow <input type="text"/></div>						
Client Account	Work Id	Work Order	Assigned To	Workflow	Step	
88887	EXTRAWO-01	18000791		ESignature	Assignment	
88887	EXTRAWO-02	18000792		ESignature	Assignment	
88887	EXTRAWO-03	18000793		ESignature	Assignment	
88887	20180803-01	18000775		ESignature	Assignment	
555555	Testing ESIG Workflow	18-WLG-000275		ESignature	Assignment	

3. Select a User from the **drop downlist** and click **Assign to User**.

*Note: There is an option to **Download Report** if you wish to review the report prior to assignment.*

## Report Details

WORKFLOW	CLIENT ACCOUNT	WORKFLOW OWNER
Assignment	(88887) Lab Method Validation Account	

### Assignment

Select user to assign report to:

Evelyn Burke (evelyn.burke@nmslabs.com) ▼

Assign to user

STATUS	CLIENT ACCOUNT	UPLOAD DATE
Unread	(88887) Lab Method Validation Account	8/8/2018 9:47:36 AM

### (Lab Report) Laboratory Results Report

<b>Client Account Number</b>	88887
<b>Name</b>	EXTRAWO-01
<b>Work Order</b>	18000791
<b>Work ID</b>	EXTRAWO-01
<b>Date Received</b>	08/08/2018 09:28
<b>Accession</b>	18000791
<b>Client Account Name</b>	Lab Method Validation Account

Download Report





## Apply E-Signature

1. Click on **My Work** tab.
2. Click the **Report Details** icon.

### Workflow

 UNASSIGNED **MY WORK** ALL

Client Account	Work Id	Work Order	Assigned To	Workflow	Step	
88887	20180801-03	18000772	Evelyn.Burke@NMS...	ESignature	Signature	
88887	EXTRAWO-01	18000791	Evelyn.Burke@NMS...	ESignature	Signature	

3. Click the **Download Report** button to review the report.

### Report Details

<b>WORKFLOW</b> Signature	<b>CLIENT ACCOUNT</b> (88887) Lab Method Validation Account	<b>WORKFLOW OWNER</b> Evelyn.Burke@NMSLABS.COM
<b>Signature</b>		
<b>Accept &amp; Sign</b>		<b>Re-Assign</b>

<b>STATUS</b> Unread	<b>CLIENT ACCOUNT</b> (88887) Lab Method Validation Account	<b>UPLOAD DATE</b> 8/8/2018 9:47:36 AM
<b>(Lab Report) Laboratory Results Report</b>		
<b>Client Account Number</b>	88887	
<b>Name</b>	EXTRAWO-01	
<b>Work Order</b>	18000791	
<b>Work ID</b>	EXTRAWO-01	
<b>Date Received</b>	08/08/2018 09:28	
<b>Accession</b>	18000791	
<b>Client Account Name</b>	Lab Method Validation Account	
<b>Download Report</b>		

- Click the **Accept & Sign** button.

## Report Details

<b>WORKFLOW</b> Signature	<b>CLIENT ACCOUNT</b> (88887) Lab Method Validation Account	<b>WORKFLOW OWNER</b> Evelyn.Burke@NMSLABS.COM
<b>Signature</b>		
<b>Accept &amp; Sign</b>		Re-Assign

- Click **Sign Document** or **Cancel**.

**Report Details**

**Electronic Signature Confirmation**

Are you sure you want to sign this document?

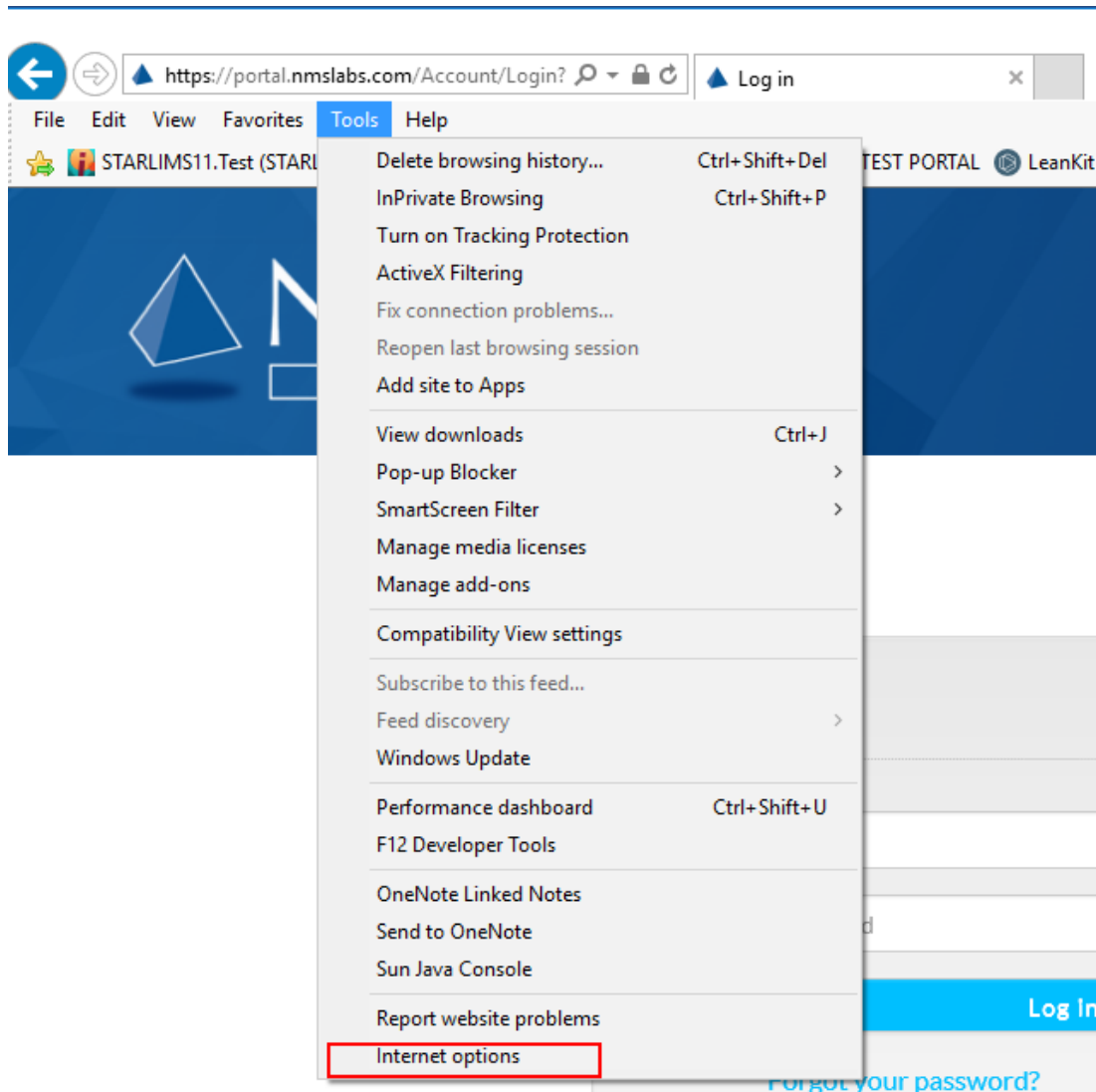
**Sign Document** **Cancel**

<b>WORKFLOW</b> Signature	<b>WORKFLOW OWNER</b> Janet.Cole@nmslabs.com
<b>Signature</b>	
<b>Accept &amp; Sign</b>	Re-Assign

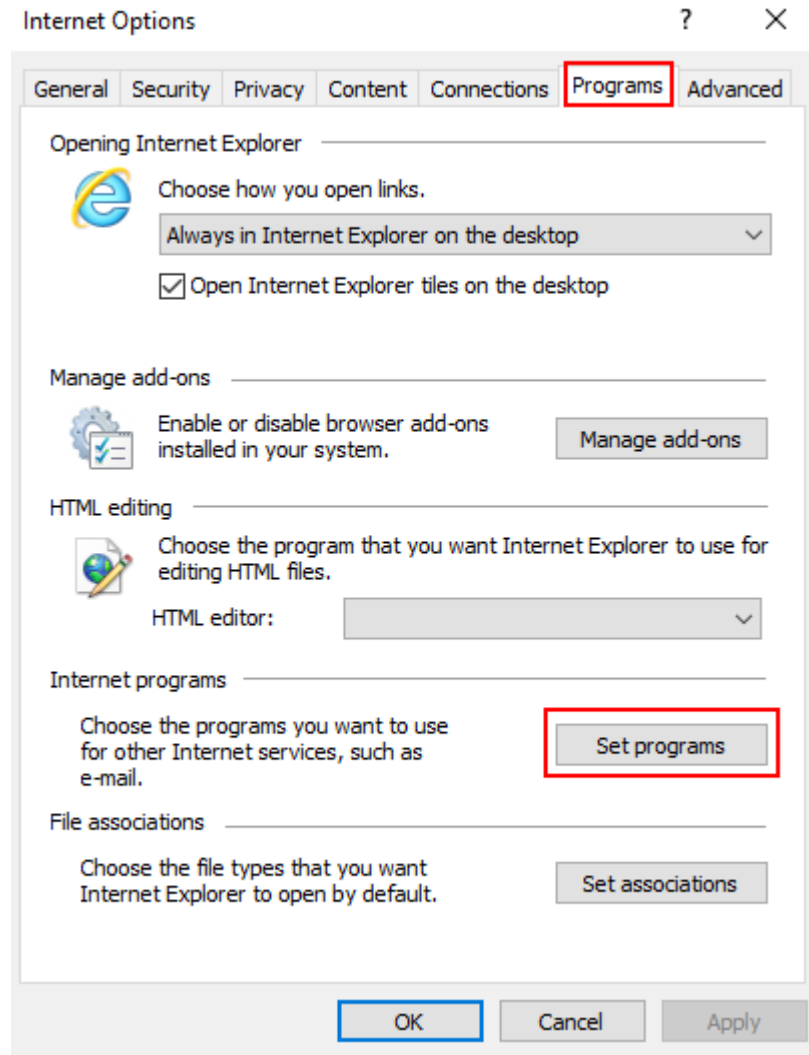
## Default Email Setup

### Internet Explorer / Windows

- Click **Tools>Internet Options**.







2. Click the **Programs** tab.
3. Click **Set Programs**.



4. Click Set your default programs.

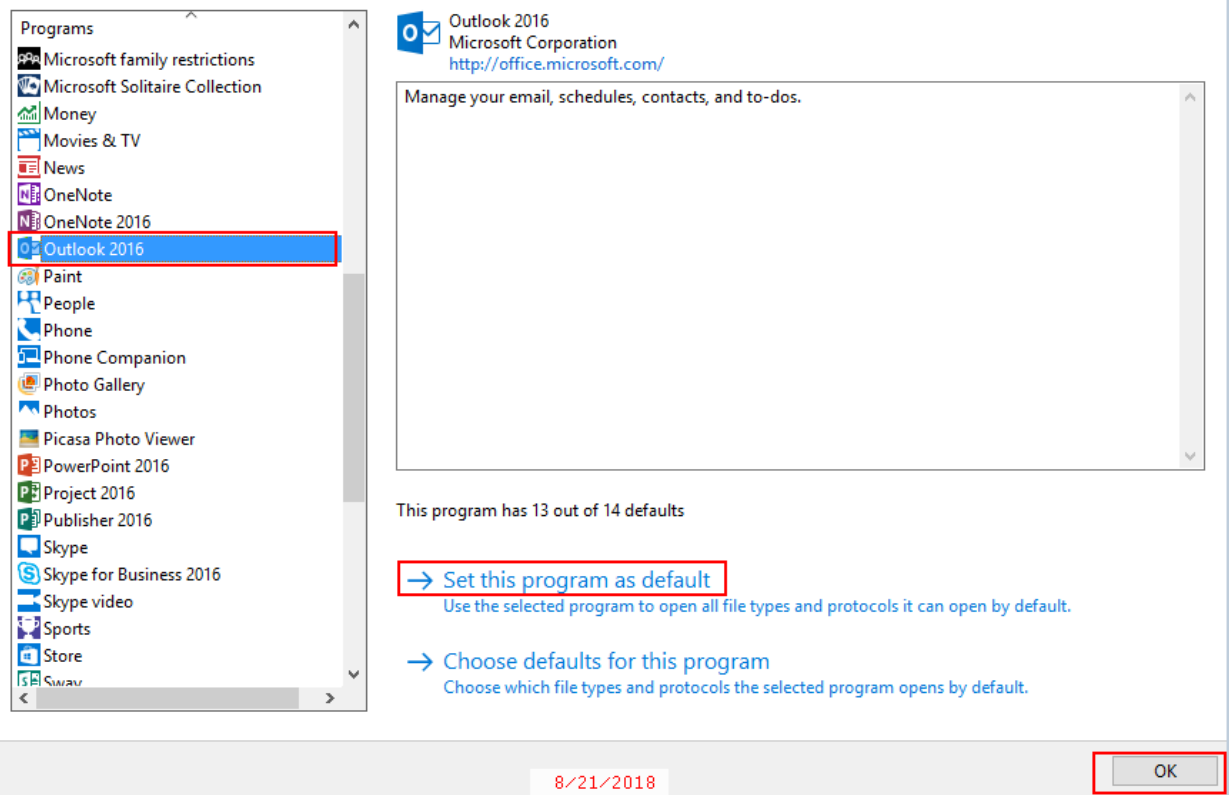
### Choose the programs that Windows uses by default

-  **Set your default programs**  
Make a program the default for all file types and protocols it can open.
-  **Associate a file type or protocol with a program**  
Make a file type or protocol always open in a specific program.
-  **Change AutoPlay settings**  
Play CDs or other media automatically
-  **Set program access and computer defaults**  
Control access to certain programs and set defaults for this computer.

5. Select your email default app and click **Set this program as Default.**
6. Click **OK.**

#### Set your default programs

To set a program as the default for all file types and protocols it can open, click the program and then click Set as default.



Outlook 2016  
Microsoft Corporation  
<http://office.microsoft.com/>

Manage your email, schedules, contacts, and to-dos.

This program has 13 out of 14 defaults

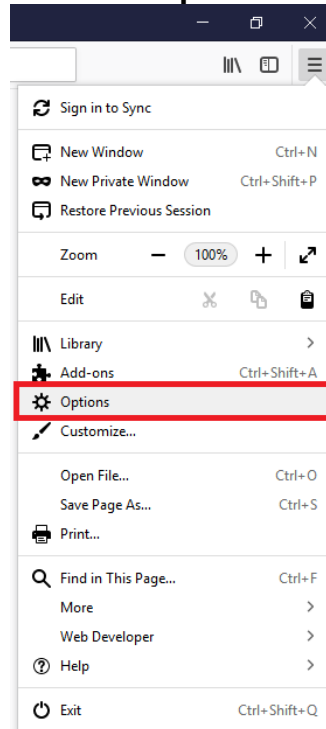
→ **Set this program as default**  
Use the selected program to open all file types and protocols it can open by default.

→ Choose defaults for this program  
Choose which file types and protocols the selected program opens by default.

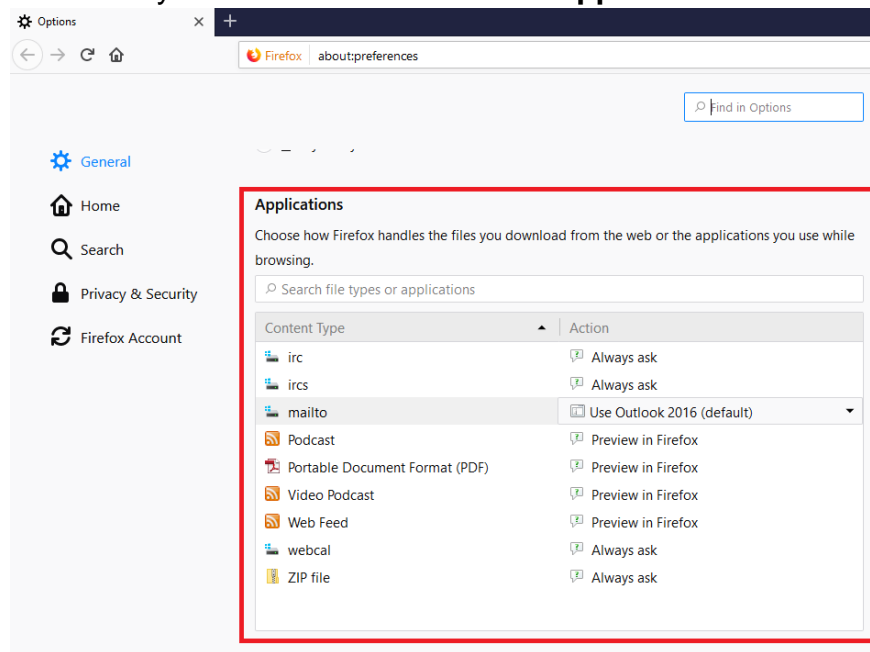
8/21/2018 OK

## Firefox

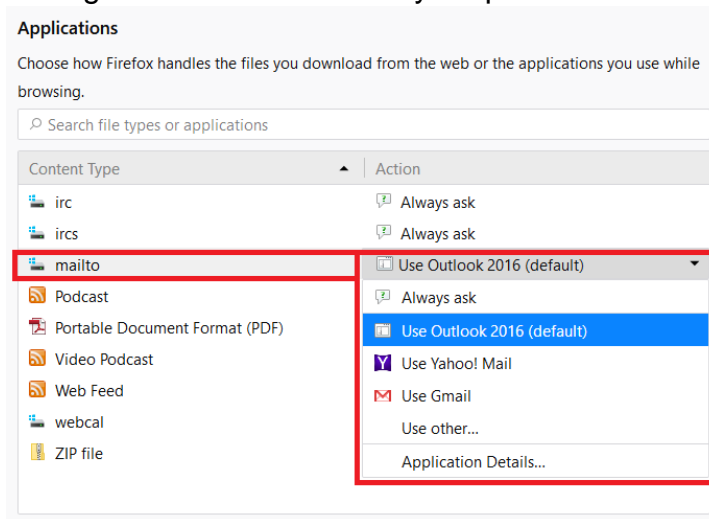
1. Open the menu and select **Options**.



2. Scroll down until you find the section labeled **Applications**.

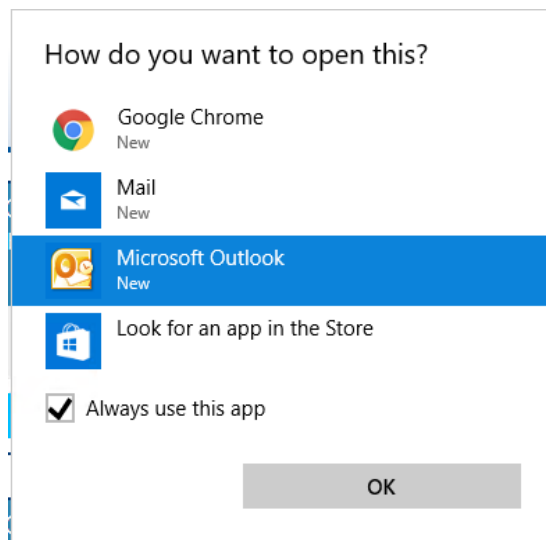


### 3. Change the **mailto** action to your preferred email client.

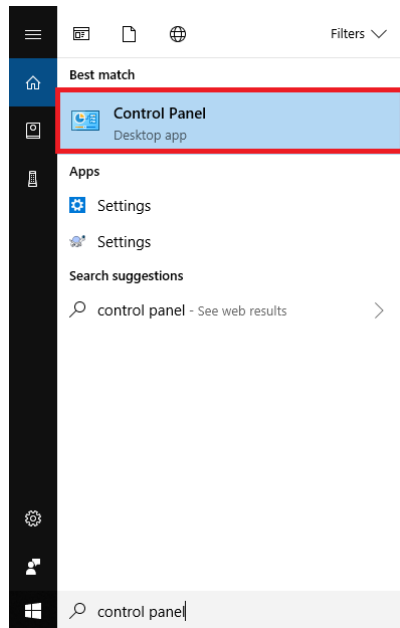


## Chrome

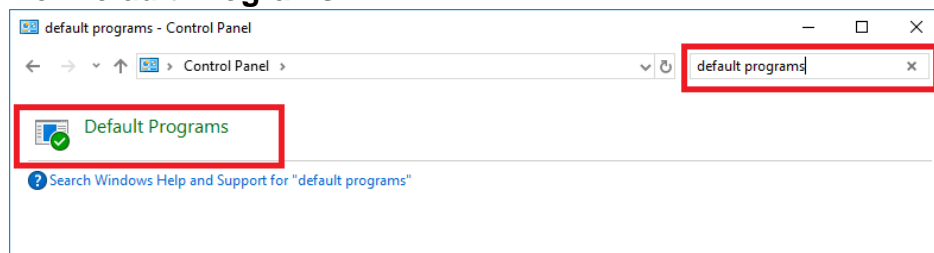
1. The first time you click on a mailto link chrome will prompt you with which application to use.



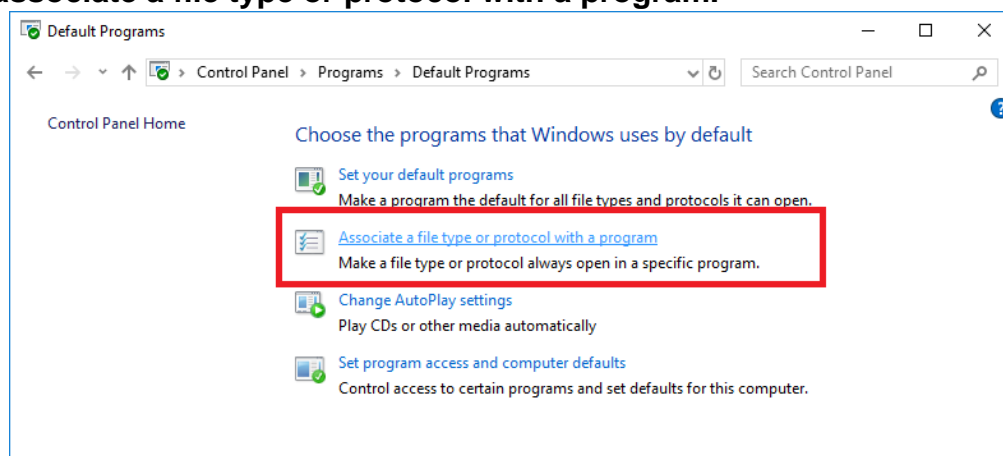
2. To change your setting on windows, go to the **Start Menu**.
3. Search for and open **Control Panel**.



#### 4. Search for **Default Programs**.

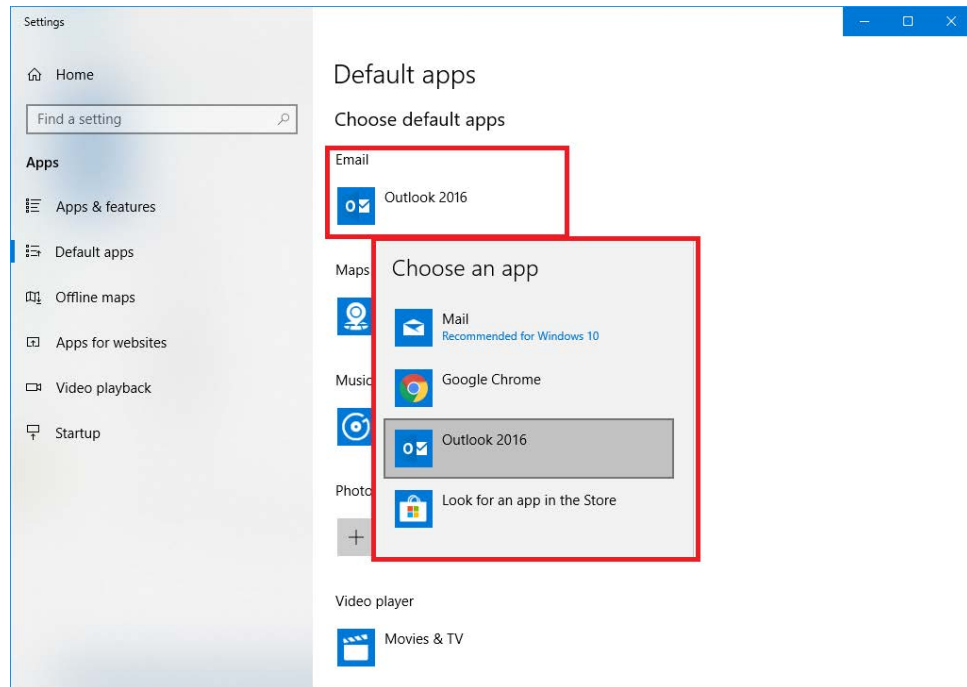


#### 5. Click **associate a file type or protocol with a program**.



#### 6. A new window will open up, Click on your email app, and select a new default app.





### **Safari / Mac OSX**

1. Instructions provided by apple for changing the default mail client are available here:  
<https://support.apple.com/en-us/HT201607>

## REPORTS

Authorized users will have access to a **Reports** tab upon logging into Client Portal. Depending on the level of access the user may have access to **Results, Litigation or Finance**.

Reports will be retained on the Client Portal for 2 years. Client Support can assist with accessing older reports, if needed.

### Report Options

1. A user can control if all reports are marked as read or unread once downloaded.
2. If the user wants reports to remain visible in the results tab, even after a report is downloaded, go to My Account. **My Account** is in the upper right corner of your screen.



3. Click **Update Settings**.

### Manage Account

Custom Settings:

[ [Update Settings](#) ]

Password:

[Send me a password reset email](#)

4. Go to **Report Options**. Check the box if you want reports marked as read upon download (default setting). Uncheck the box if you want reports to be marked unread even after download.

- Important:** When downloading a report, the system will automatically mark the report as **Read**. You may update your User Settings to remove this option.
- If a report is marked read, it can still be retrieved. From the Results tab, click **Show Read Reports** to view the report after opening the report.
- When searching for a report, check the **Show Read Reports** box so that all documents are evaluated.
- Final reported results and Litigation Packets are supplied in an Adobe (.pdf) format.

## View a Report

- Click on the **download** symbol.

### Reports

RESULTS LITIGATION ALL

☐ Show Read Reports

Lab Report 30 Days

	Delivered	Name	Client Account	Work ID	Work Order ↓		
✉	07/20/2023	DOE, JANE E	(88888) ABC Example Customer Name	TEST5	23001175	🔄	📄
✉	07/20/2023	DOE, MARY	(88888) ABC Example Customer Name	TEST4	23001174	🔄	📄
✉	07/19/2023	Not Provided	(88888) ABC Example Customer Name	TC40	23001169	🔄	📄

RESULTS LITIGATION ALL

☒ Show Read Reports

All File Types 30 Days

	Delivered ↓	File Type	Report Attributes	Client Account		
✉	07/20/2023	Chain Of Custody	Work Order: 23001169 Work ID: TC40 Name: Not Provided Submitting Client: Test District Attorney	(88888) ABC Example Customer Name	🔄	📄
	07/06/2023	Chain Of Custody	Work Order: 23001113 Work ID: WO1 Name: John Doe Submitting Client: Mr. District Attorney	(88888) ABC Example Customer Name	🔄	📄

## Reports

RESULTS LITIGATION **FINANCE** ALL

☐ Show Read Reports

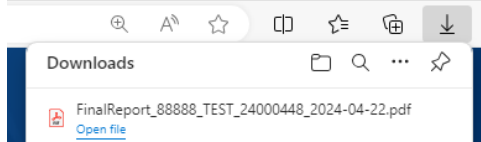
**Make Payment**


All File Types

30 Days

	File Type	Client Account	Delivered ↓	Invoice Number	Invoice Date	Invoice Amount			
✉	Invoice (PDF)	(88888) ABC Example Customer Name	04/17/2024	1000653	02/29/2024	\$366.00	🔄	📄	🔍
✉	Invoice (Excel)	(88888) ABC Example Customer Name	04/17/2024	1000654	02/29/2024	\$366.00	🔄	📄	🔍

## 2. The report will Download, Click **Open file.**





**NMS Labs**

3701 Welsh Road, PO Box 435A, Willow Grove, PA 19090-0437  
 Phone: (215) 657-4900 Fax: (215) 657-2972 Fax: (215) 657-2972  
 email: info@nmslabs.com  
 Robert A. Middleberg, PhD, F-ABMT, GABCC-TO, Laboratory Director

TESTING: BETALIMS

**Final Report**

Report Issued 04/25/2018 09:03

Last Report issued 04/25/2018 08:46

88888

Critical Example Report

Attn: IT Department

3701 Welsh Road

Willow Grove, PA 19090

**Patient Name** MULLEN, ERIC

**Patient ID** TESTING

**Chain** NMSGP2827

**Age** Not Given **DOB** Not Given

**Gender** Not Given

**Workorder** 18000231

**Received DUTm** 04/25/2018 07:46

**Collect DUTm** 04/11/2018

Analysis and Comments	Result	Flag	Units	Reference Range / Reporting Limit (RL)
<b>1848 Drugs of Abuse Screen (10 Panel) TEST, Blood</b>				
Opiates	None Detected		ng/mL	RL: 20
Cocaine / Metabolites TEST	None Detected		ng/mL	RL: 20
Benzodiazepines	None Detected		ng/mL	RL: 100
Cannabinoids	None Detected		ng/mL	RL: 10
Amphetamines	None Detected		ng/mL	RL: 20
Barbiturates	None Detected		mcg/mL	RL: 0.040
Methadone / Metabolite	None Detected		ng/mL	RL: 25
Phencyclidine	None Detected		ng/mL	RL: 10
Methamphetamine / MDMA	None Detected		ng/mL	RL: 20
Oxycodone / Oxycodone	None Detected		ng/mL	RL: 10

Provided reference ranges and associated result flags for Toxicology and Metals test results are not intended for all patient scenarios. Variables including, but not limited to, dose, dosing schedule, age, gender, medical conditions and/or disease states should be taken into account when interpreting any result.

Page 1 of 1 NMS v.2.0

## Print Multiple Reports

1. Use the keyboard **Ctrl Click** or **Shift Click** to select the reports for printing.
2. Click the drop-down arrow located on the bottom left of the screen and select **Download to Zip**.

RESULTS LITIGATION FINANCE ALL

☐ Show Read Reports

All File Types 12 Months

	Delivered ↓	Name	Client Account	Work ID	Work Order		
✉	05/09/2023	1480SP	(88888) ABC Example Customer Name	1480SP	18000127	📄	📄
✉	05/09/2023	1480U-POS	(88888) ABC Example Customer Name	1480U-POS	18000130	📄	📄
✉	05/09/2023	1480SP-POS	(88888) ABC Example Customer Name	1480SP-POS	18000128	📄	📄
✉	05/09/2023	1480B	(88888) ABC Example Customer Name	1480B	18000125	📄	📄
✉	05/09/2023	1480U	(88888) ABC Example Customer Name	1480U	18000129	📄	📄
✉	05/09/2023	10194R	(88888) ABC Example Customer Name	10194R	18000109	📄	📄
✉	05/09/2023	10194R-POS	(88888) ABC Example Customer Name	10194R-POS	18000110	📄	📄

For Selected Reports

For Selected Reports

Download to Zip

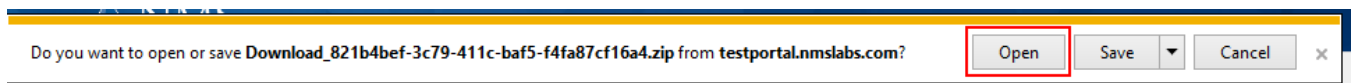
Mark Read

Mark Unread

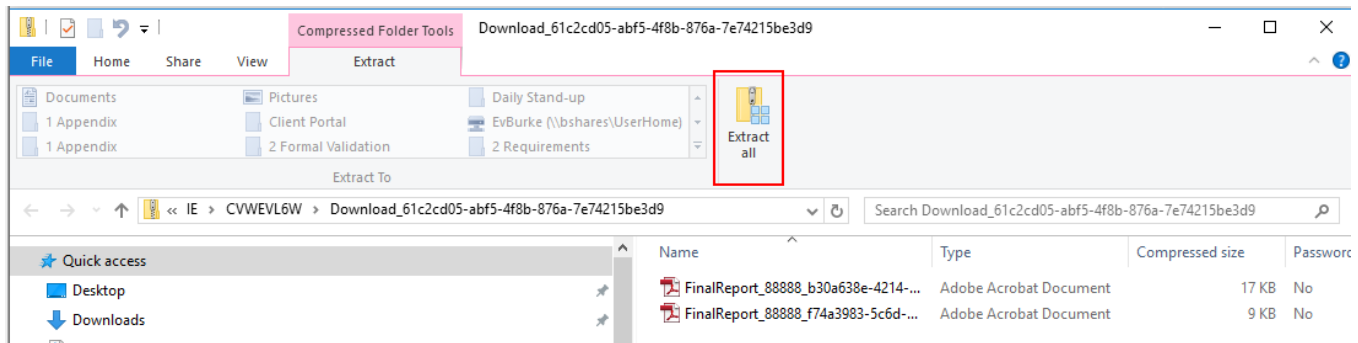
161 162 163 164 165 166 10 items per page

1651 - 1657 of 1657 items

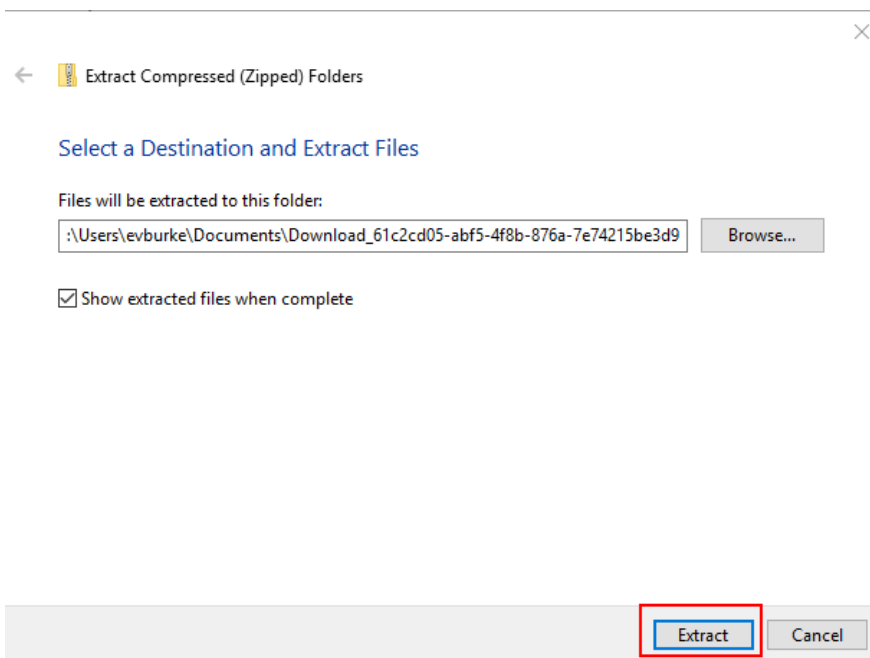
3. Click the **Open** option.



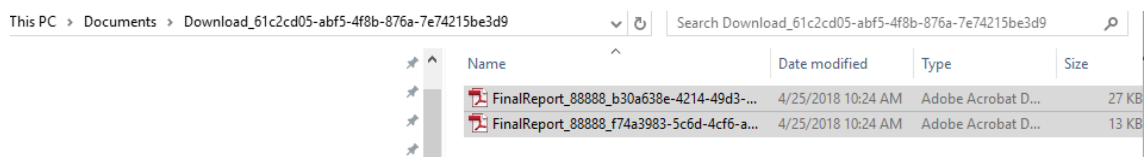
4. Click **Extract all**



## 5. Click **Extract**.



## 6. **Shift Click** or **Ctrl. Click** to select the files for printing



## Change Report Status to Unread

When opening or downloading a report the status will automatically update to **Read** unless the appropriate report option is unchecked in Settings.

To update the status to **Unread**, follow the steps below:

1. Click **Show Read Reports**.

☒ Show Read Reports
 

All File Types
 7 Days

Delivered ↓	Name	Client Account	Work ID	Work Order		
✉ 07/20/2023	NR-03	(88888) ABC Example Customer Name	NR-03	21000181	🔄	📄
07/20/2023	DOE, MARY	(88888) ABC Example Customer Name	TEST4	23001174	🔄	📄
✉ 07/20/2023	DOE, JANE E	(88888) ABC Example Customer Name	TEST5	23001175	🔄	📄
✉ 07/19/2023	IT DEMO	(88888) ABC Example Customer Name	CLINICAL	23001146	🔄	📄

1 25 items per page

2. Select the report by clicking on the case ID or select multiple reports by using the keyboard **Ctrl Click** or **Shift Click** to select the reports for printing.

3. Click the drop-down list and select **Mark as Unread**

☒ Show Read Reports
 

All File Types
 30 Days

Delivered ↓	Name	Client Account	Work ID	Work Order		
07/20/2023	DOE, MARY	(88888) ABC Example Customer Name	TEST4	23001174	🔄	📄
✉ 07/20/2023	DOE, JANE E	(88888) ABC Example Customer Name	TEST5	23001175	🔄	📄
✉ 07/19/2023	IT DEMO	(88888) ABC Example Customer Name	CLINICAL	23001146	🔄	📄

1 25 items per page

For Selected Reports
 

For Selected Reports  
 Download to Zip  
 Mark Read  
 Mark Unread

## Invoice Payment

A payment link is available on the Finance tab.

1. Click the Make Payment button.

### Reports

RESULTS
LITIGATION
**FINANCE**
ALL

☐ Show Read Reports
 **Make Payment**
All File Types
30 Days

	File Type	Client Account	Delivered ↓	Invoice Number	Invoice Date	Invoice Amount			
✉	Invoice (PDF)	(88888) ABC Example Customer Name	04/17/2024	1000653	02/29/2024	\$366.00	🔄	📄	🔍
✉	Invoice (Excel)	(88888) ABC Example Customer Name	04/17/2024	1000654	02/29/2024	\$366.00	🔄	📄	🔍

## Invoice Inquiry

Note: If multiple invoice numbers are attached to an invoice a plus symbol will display.

Delivered ↓	Invoice Number	Invoice Date	Invoice Amount			
04/16/2024	1000650+	02/29/2024	\$1,543.00	🔄	📄	🔍

A contact link for questions on a specific invoice is available on the Finance tab.

1. Click the Contact button to generate an email message.

### Reports

RESULTS
LITIGATION
**FINANCE**
ALL

☐ Show Read Reports
 **Make Payment**
All File Types
30 Days

	File Type	Client Account	Delivered ↓	Invoice Number	Invoice Date	Invoice Amount			
✉	Invoice (PDF)	(88888) ABC Example Customer Name	04/17/2024	1000653	02/29/2024	\$366.00	🔄	📄	🔍
✉	Invoice (Excel)	(88888) ABC Example Customer Name	04/17/2024	1000654	02/29/2024	\$366.00	🔄	📄	🔍



## TEST CATALOG

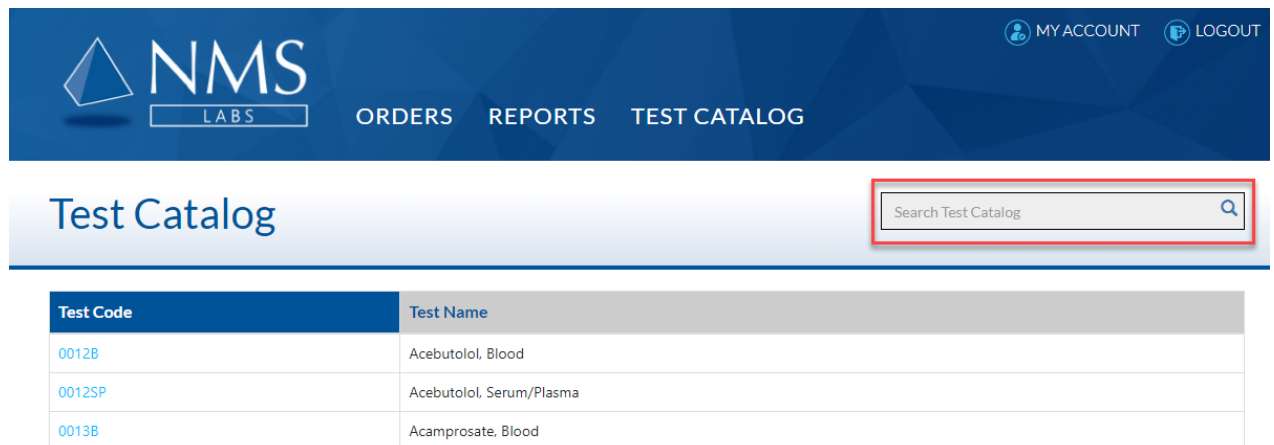
Authorized users will have access to the Test Catalog tab upon logging into Client Portal.

The Test Catalog access allows users to view test specific information.

### Searching the Test Catalog

1. The Test Catalog may be searched by the following:

- Test Code (i.e., 1300B)
- Test Description (i.e., cocaine)
- Matrix (i.e., Blood)
- Synonym (i.e., Crack)
- Method: (i.e., High Performance Liquid Chromatography)



Test Code	Test Name
<a href="#">0012B</a>	Acebutolol, Blood
<a href="#">0012SP</a>	Acebutolol, Serum/Plasma
<a href="#">0013B</a>	Acamprosate, Blood

2. Click the blue Test Code link to view information pertaining to the test code.

## Test Catalog

Test Code	Test Name
0012B	Acebutolol, Blood
0012SP	Acebutolol, Serum/Plasma
0013B	Acamprosate, Blood

### 3. The information is organized in three tabs:

- Overview: Test Code, Test Name, Test Includes, Synonym(s) Method(s) and Purpose
- Specimen: Requested Volume, Minimum Volume, Transport Temperature, Specimen Container, Special Handling, Light Protection Required, Rejection Criteria, Stability
- Other: Turnaround Time, Suggested CPT Code(s)

## Acebutolol, Serum/Plasma

[Overview](#)
[Specimen](#)
[Other](#)

**Test Code** 0012SP  
**Test Name** Acebutolol, Serum/Plasma  
**Test Includes** Acebutolol  
**Synonym(s)** Sectral®  
**Method(s)** High Performance Liquid Chromatography/ Tandem Mass Spectrometry (LC-MS/MS)