CLIENT PORTAL USER GUIDE

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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
Forensic clients: 1-866-522-2216 / Forensics@nmslabs.com
Expert Service clients: 1-844-276-0768 / expertservices@nmslabs.com
Billing inquiries: 1-800-522-6671 **/** BillingTIQ@nmslabs.com
Crime Lab clients: 1-844-276-1182 / 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.

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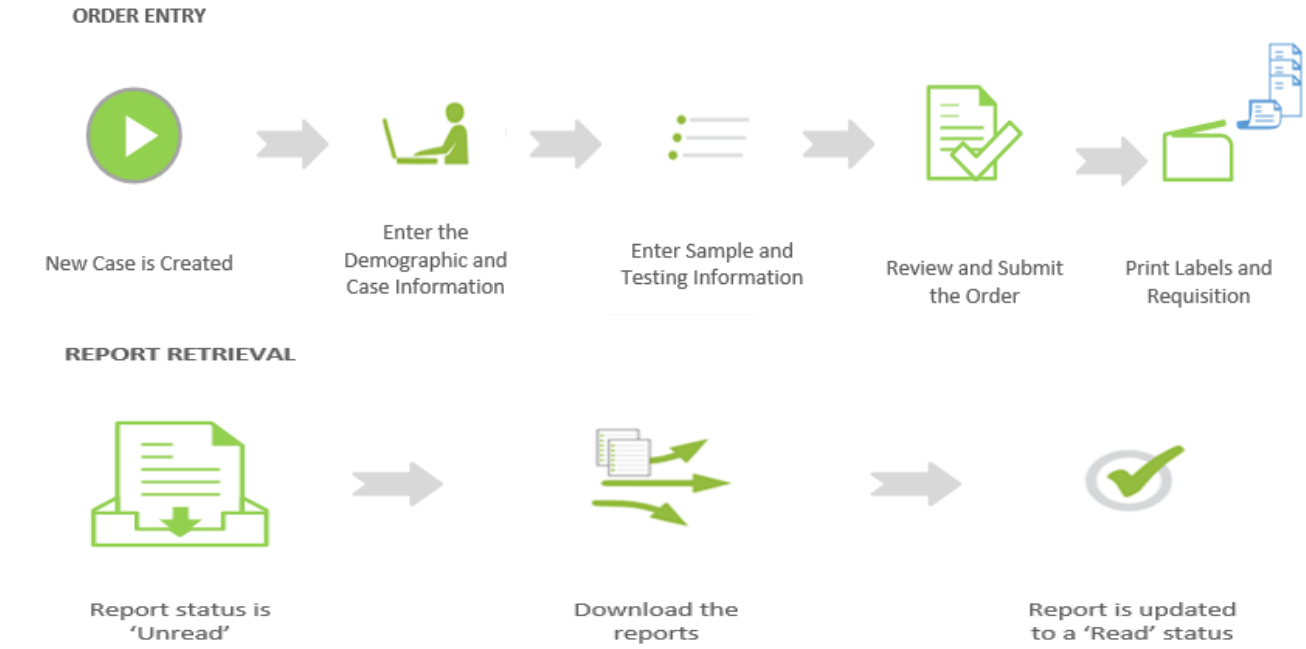

Client Portal Identifiers, Codes and Terms

Client Portal Identifiers	Definition
Accession	Unique number used to identify the Client Portal Case. Format: NMSCP-NNNN; Example: NMSCP2815 • **N** = 4-Digit Unique Number The unique number will increase after it reaches 9999.
Case ID/Incident Number	The Client's unique number used to identify a Laboratory Case.
Requisition Type / Work ID	The type of work submitted. • **Clinical** • **Police** • **Postmortem** • **Other**
Sample	The Specimen being submitted to NMS Labs.
Requisition	A report with the information entered including the Patient Demographics, Case Information and Testing requested.

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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.

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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.

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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 in 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.

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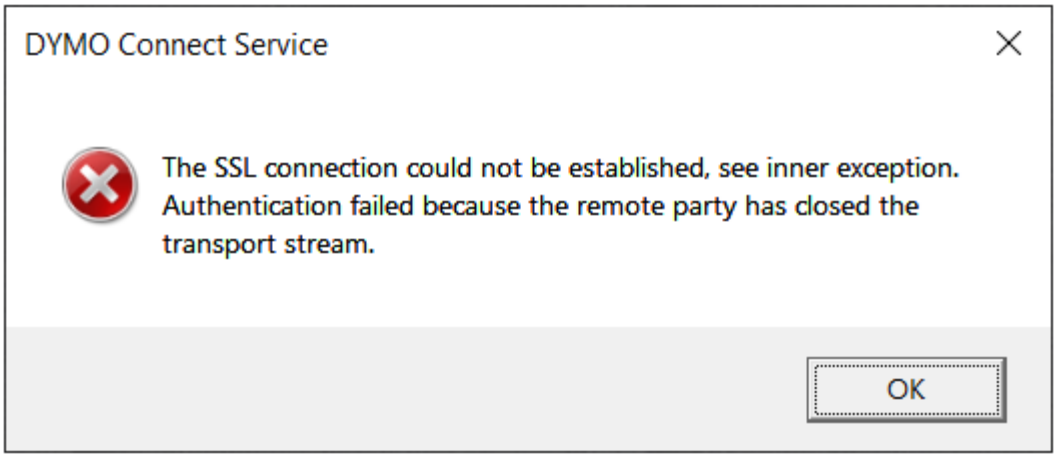
- If using Firefox 2+ please ensure that the certificate is present: https://localhost:41951/DYMO/DLS/Printing/Check
  To permanently save the cert, please turn off "Never remember history" in Options > Privacy & Security tab.
  Important: When accepting the cert, make sure the "Permanently store this 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. 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.

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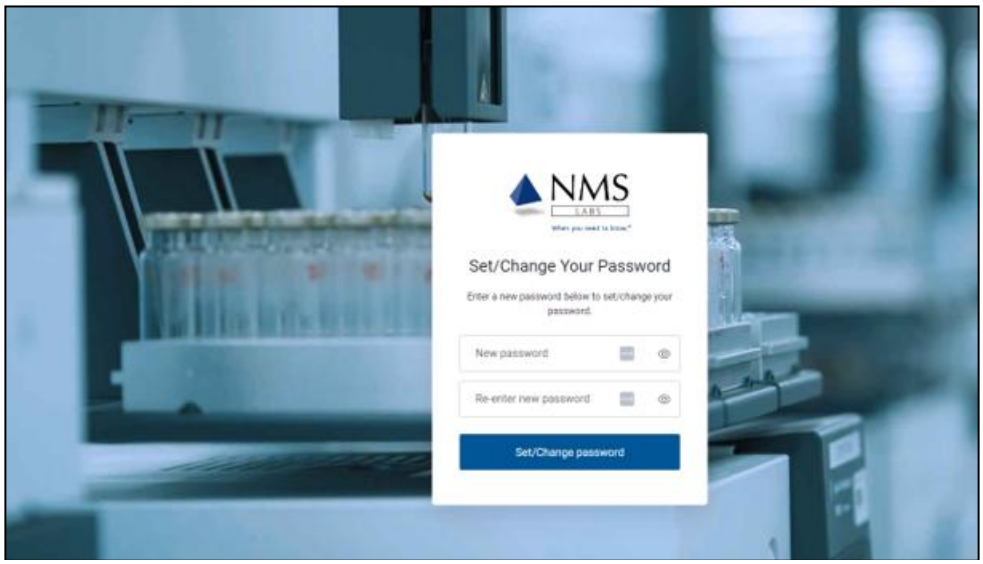
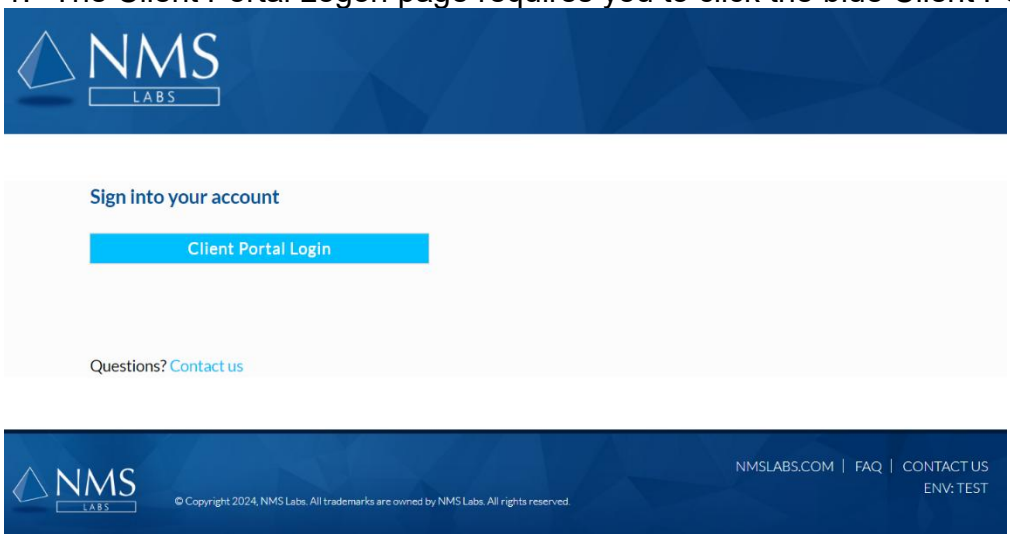


A password must contain:

- 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.



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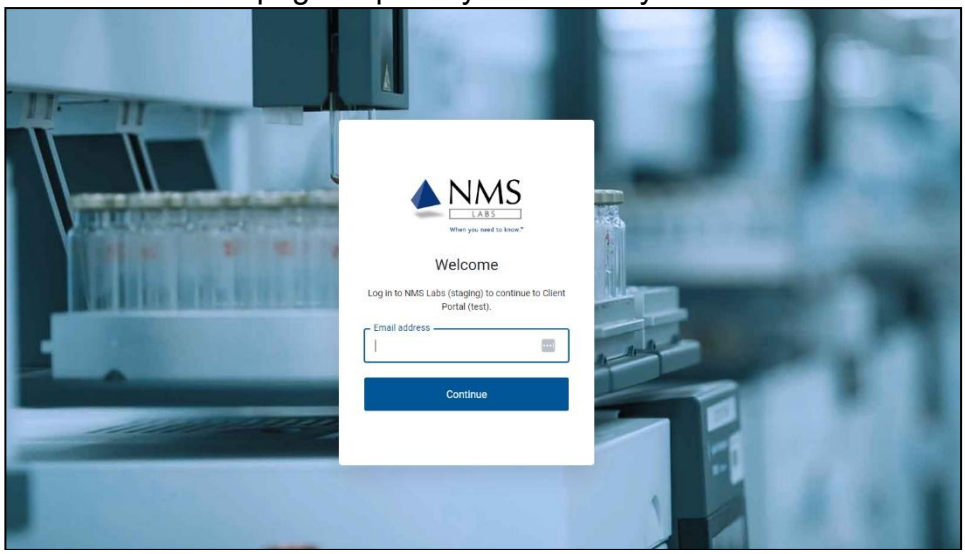
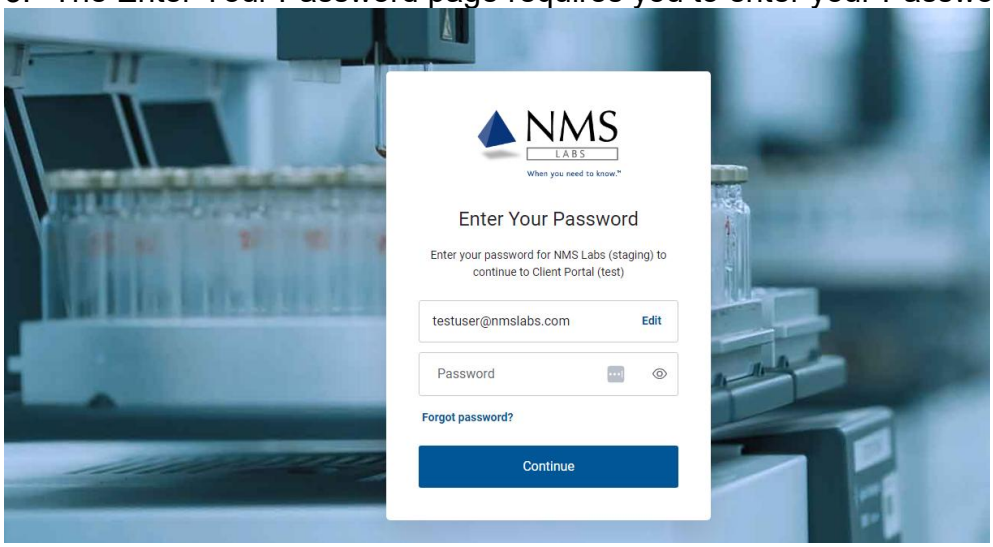
2. The Welcome page requires you to enter your Email address and click Continue.



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.

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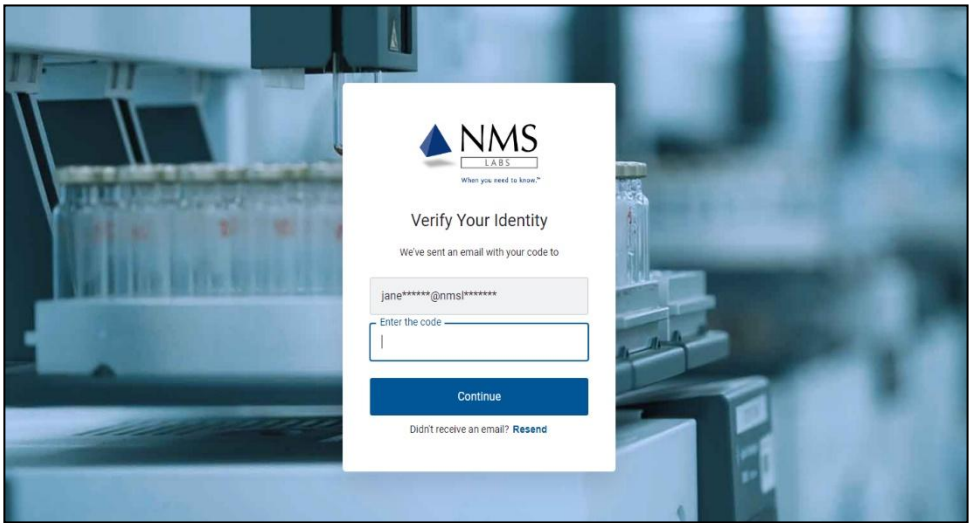
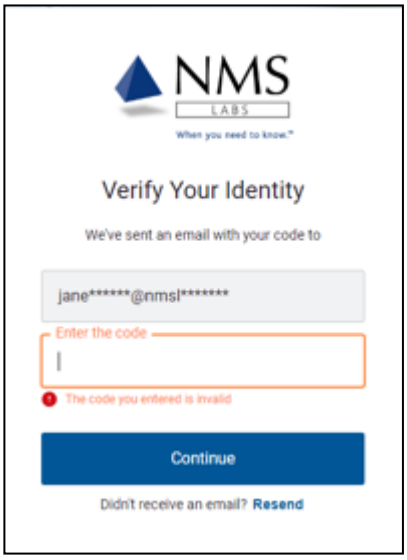


6. The user will be successfully logged in if the verification code is valid.

7. 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

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

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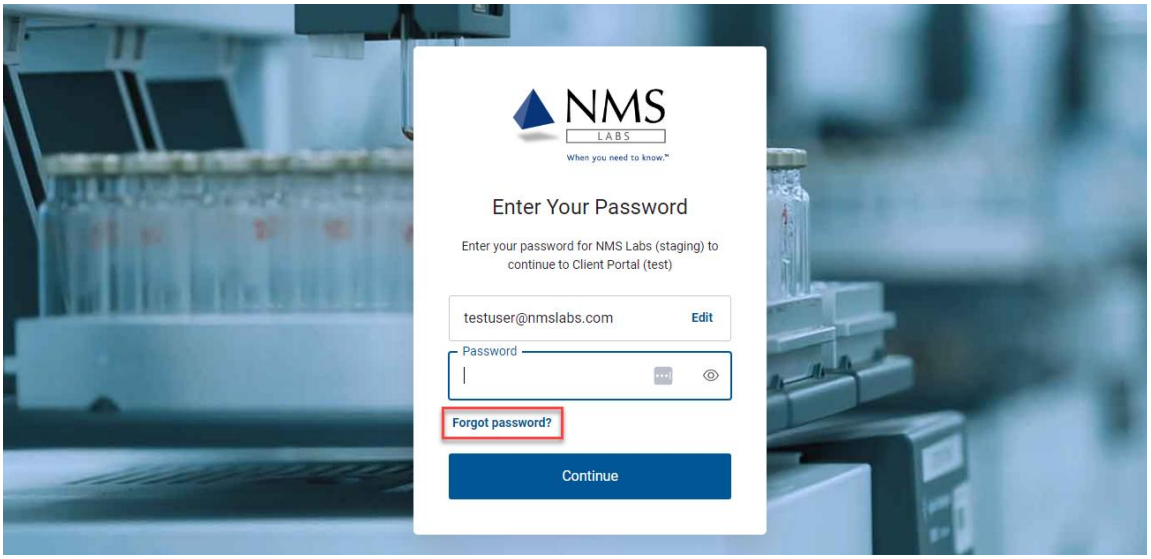
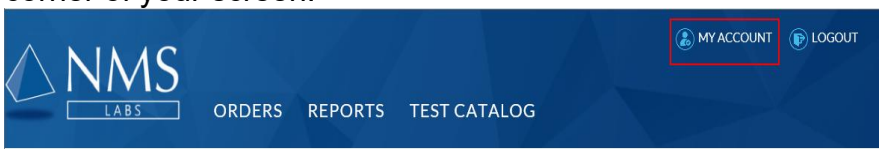


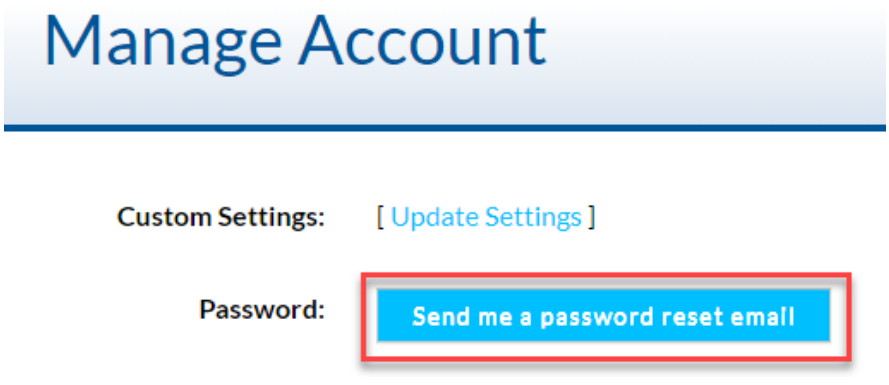
2. A Password Reset email will generate for the creation of a new password.

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.



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.

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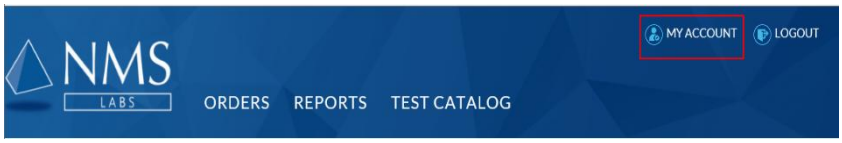
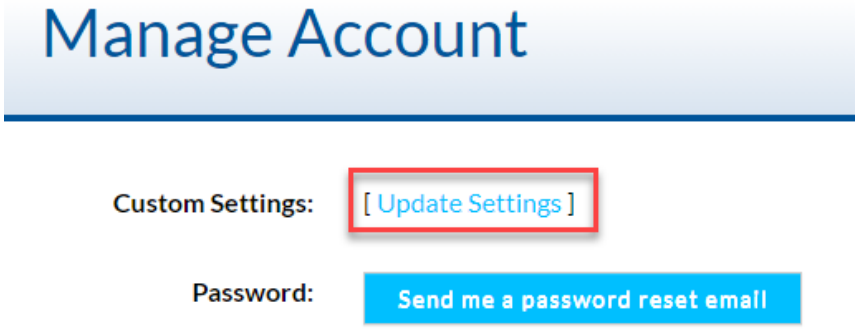
Email Notification

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

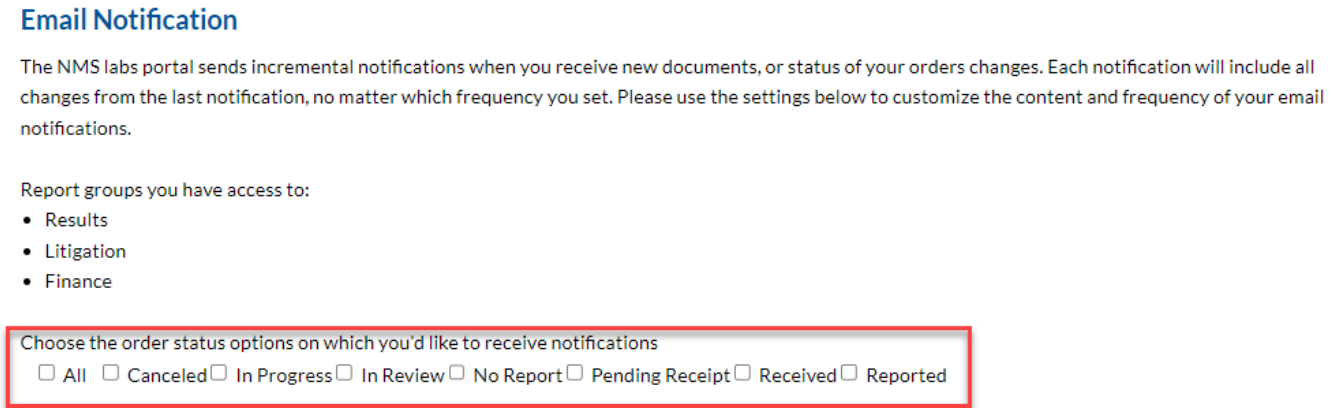
1. Click **My Account** in the upper right corner of your screen.



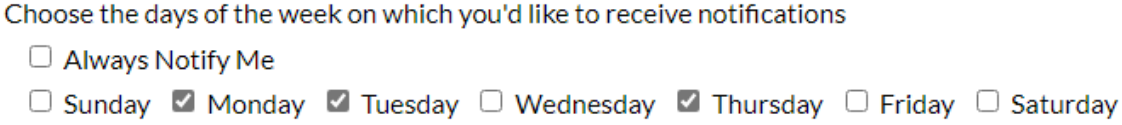
2. Click **Update Settings**.



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



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



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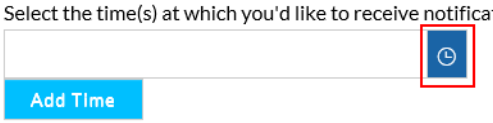
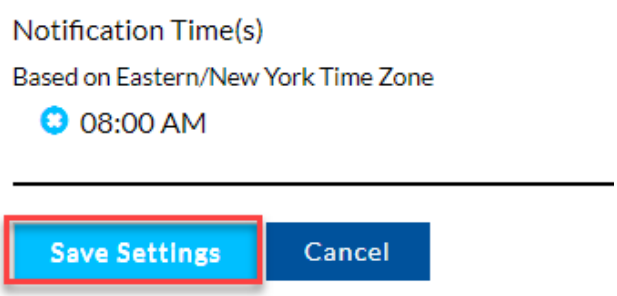
Note: Always Notify Me can be selected for hourly daily email notifications.

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



5. Click **Add Time.**

6. Click **Save Settings**.



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ORDER ENTRY

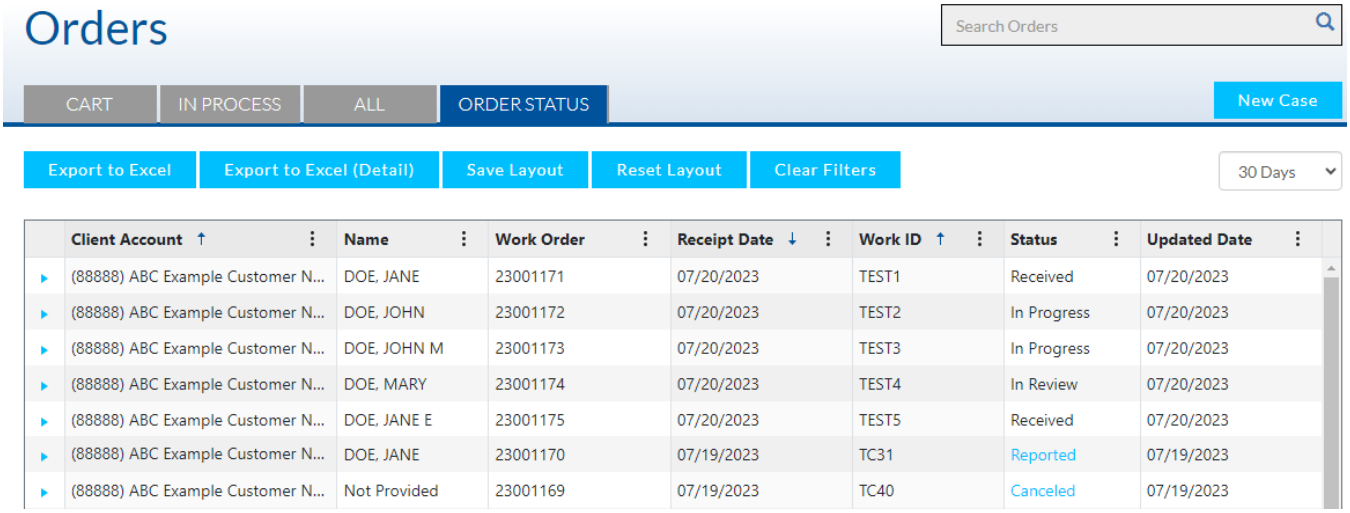
All users will open the client portal to the **Order Status** page. Additional access and tabs will appear depending upon the user's access authorization.

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.



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.

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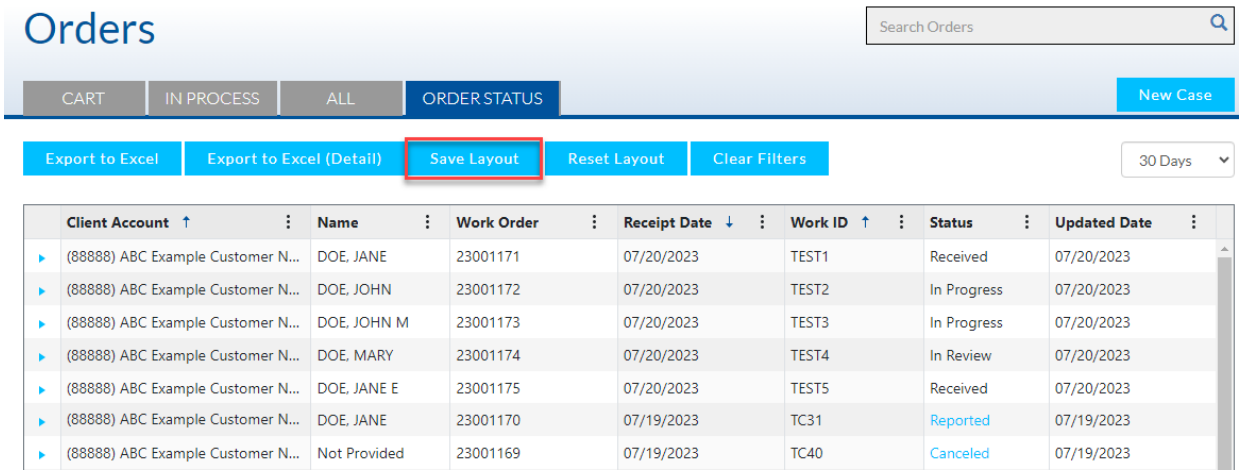
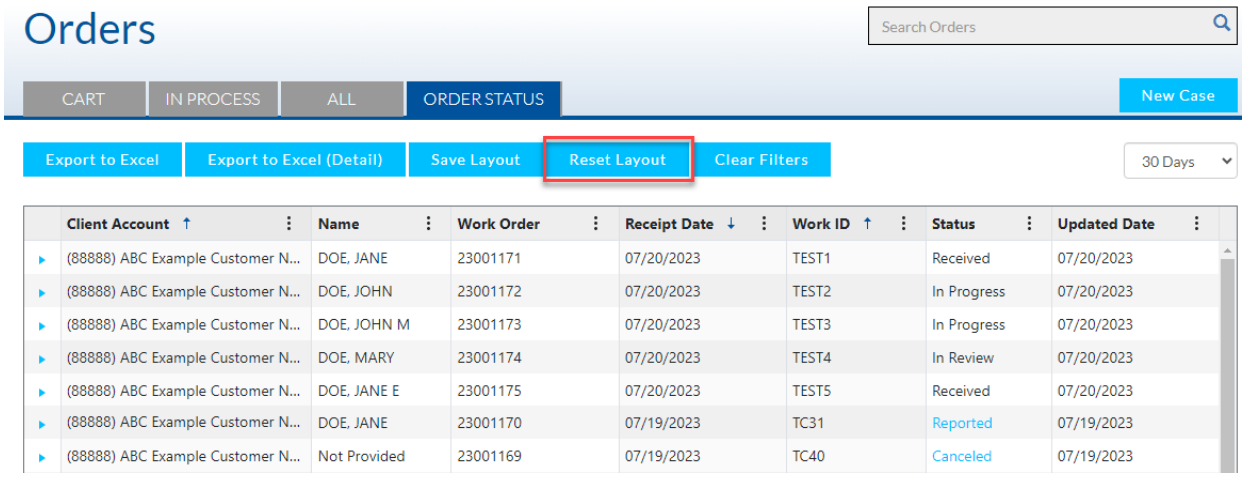
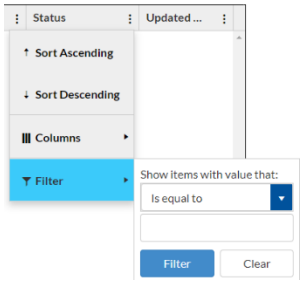


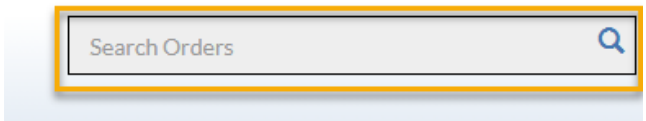
5. To return to a default view, click **Reset Layout**, and **Save Layout**.



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



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



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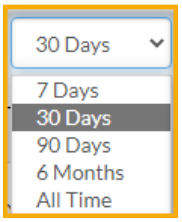
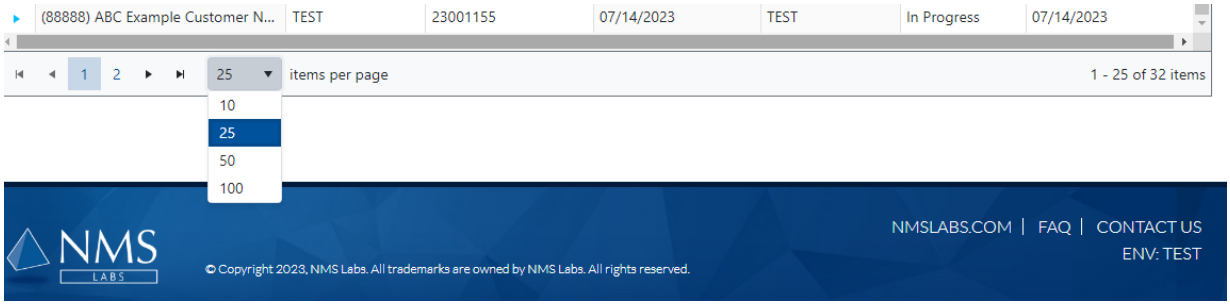
8. The grid will default to the last 30 days of information, but the user can control the amount of information displayed.



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.

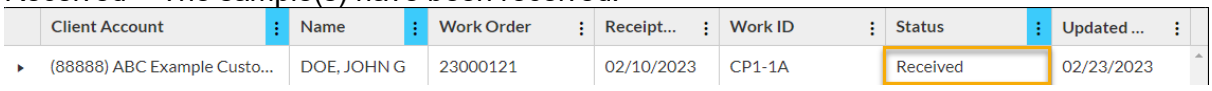


Order Status – Status Definitions

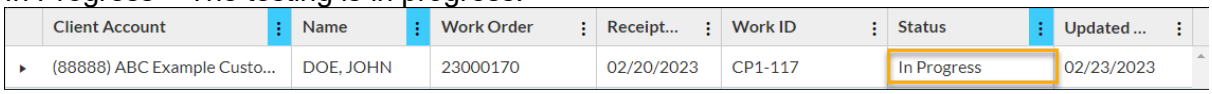
Note: Hover over a status to see a tool tip with the status definition.

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.

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



3. In Progress = The testing is in progress.



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4. In Review = The results are in review.

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

Order Status – Detail Level

1. 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

2. 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

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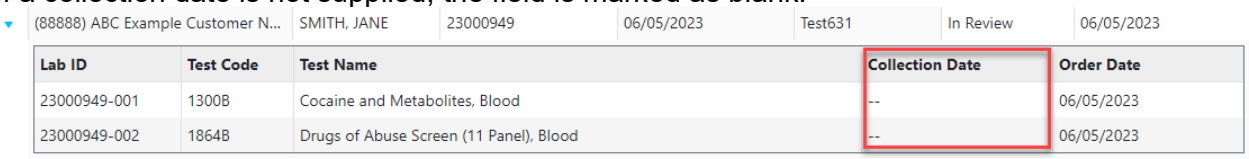
3. If a collection date is not supplied, the field is marked as blank.



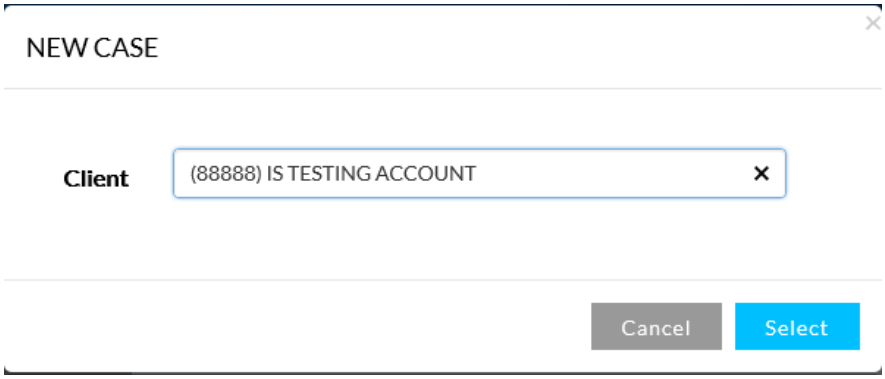
(88888) ABC Example Customer N...	SMITH, JANE	23000949	06/05/2023	Test631	In Review	06/05/2023

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

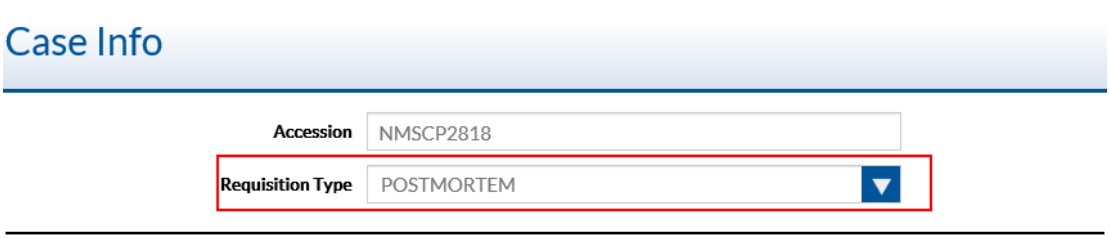
1. From the Orders Screen Click the **New Case** button.

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



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.



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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'
   - **Suffix** – The Suffix of the Decedent, Suspect or Patient.
   - **Labeled As** – A concatenation of the Last Name, Suffix, First Name and Middle initial. The field is truncated to meet the label field length requirements.

3. 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.

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

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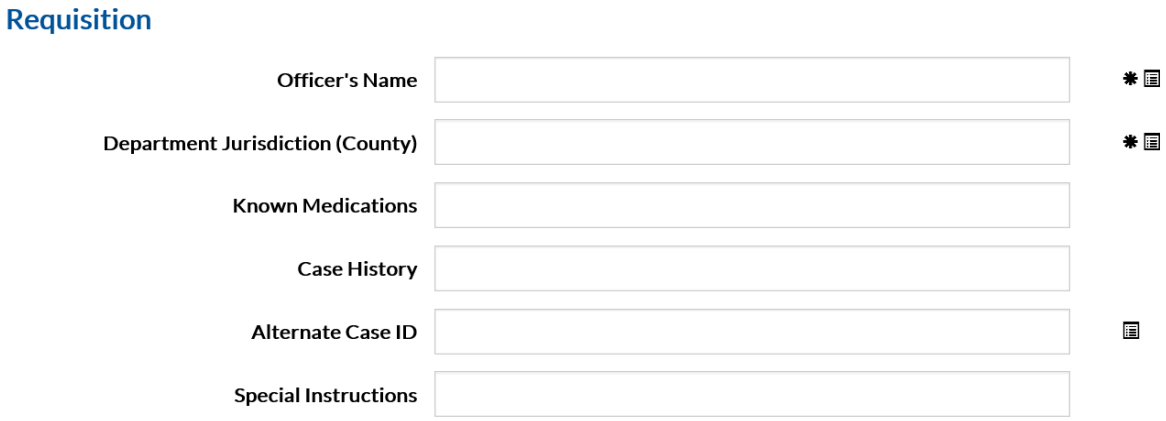
Police requisition questions**:**

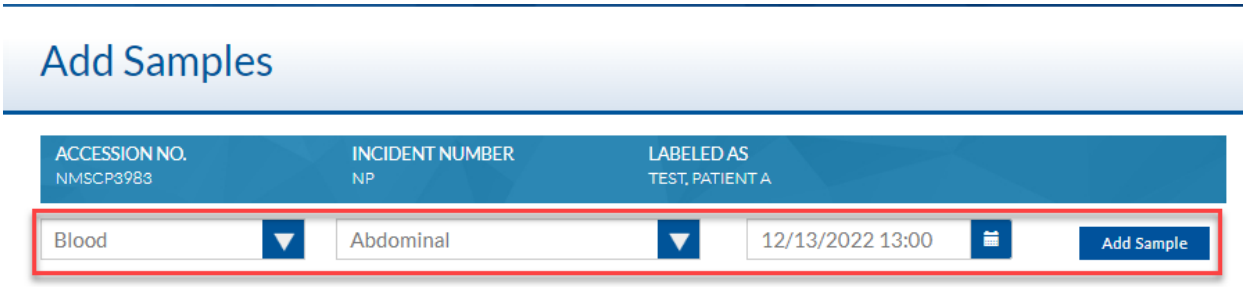


5. The page icon indicates the values are included on the final report.
6. The asterisk icon indicates the value is required.

Add Samples

1. 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.



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

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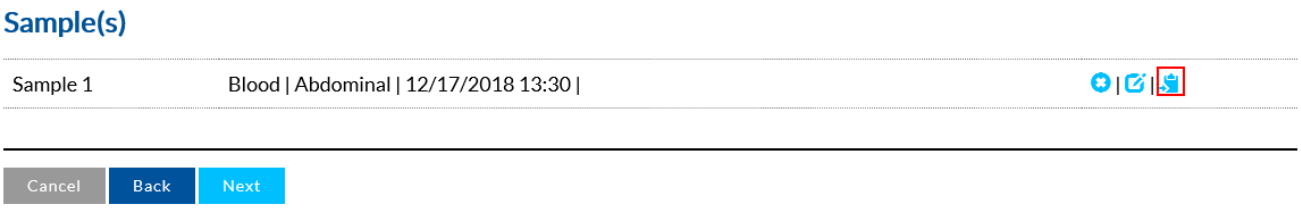
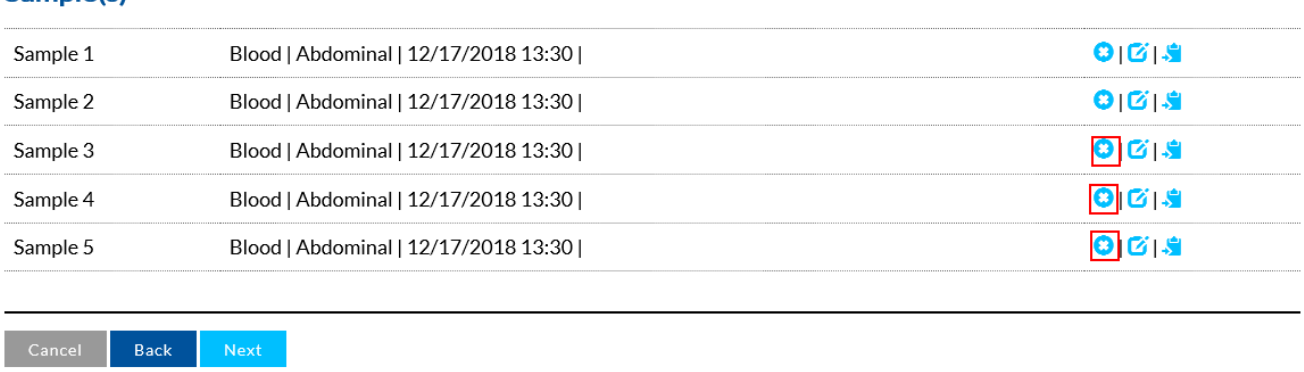
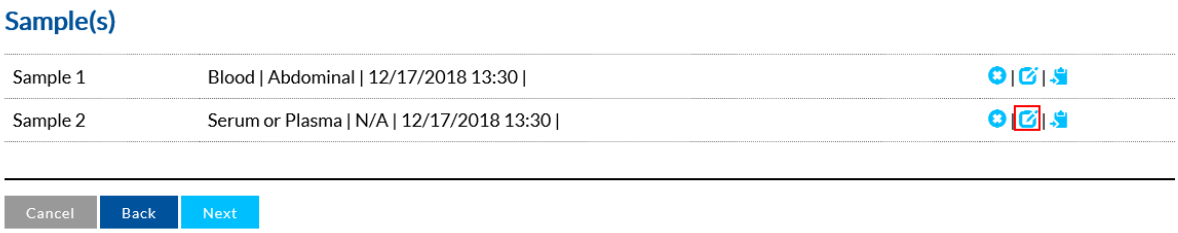


3. Click the button to delete a sample.



4. Click the button to edit a sample.



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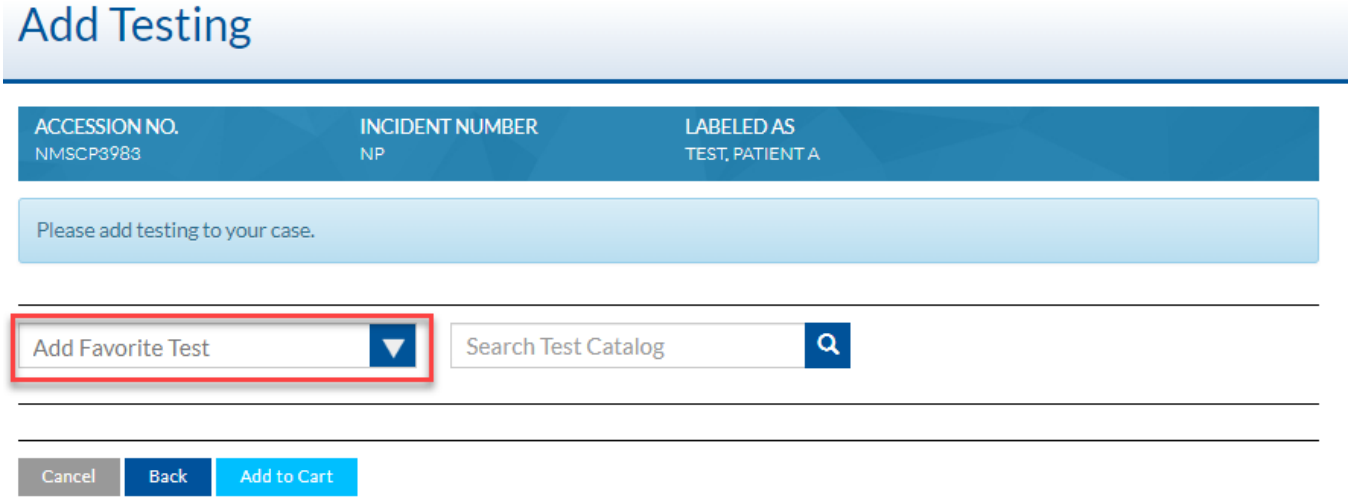
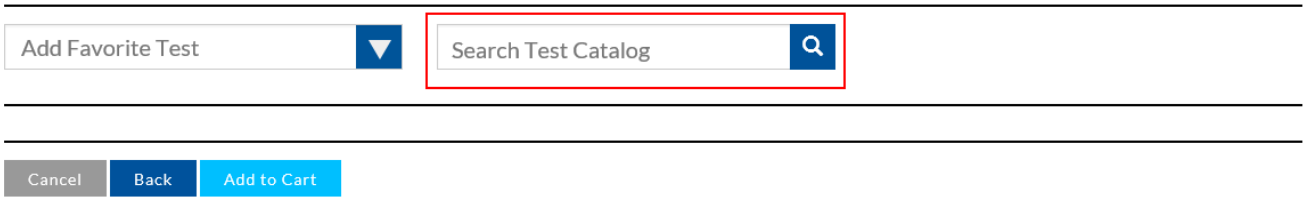
Add Testing

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.



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



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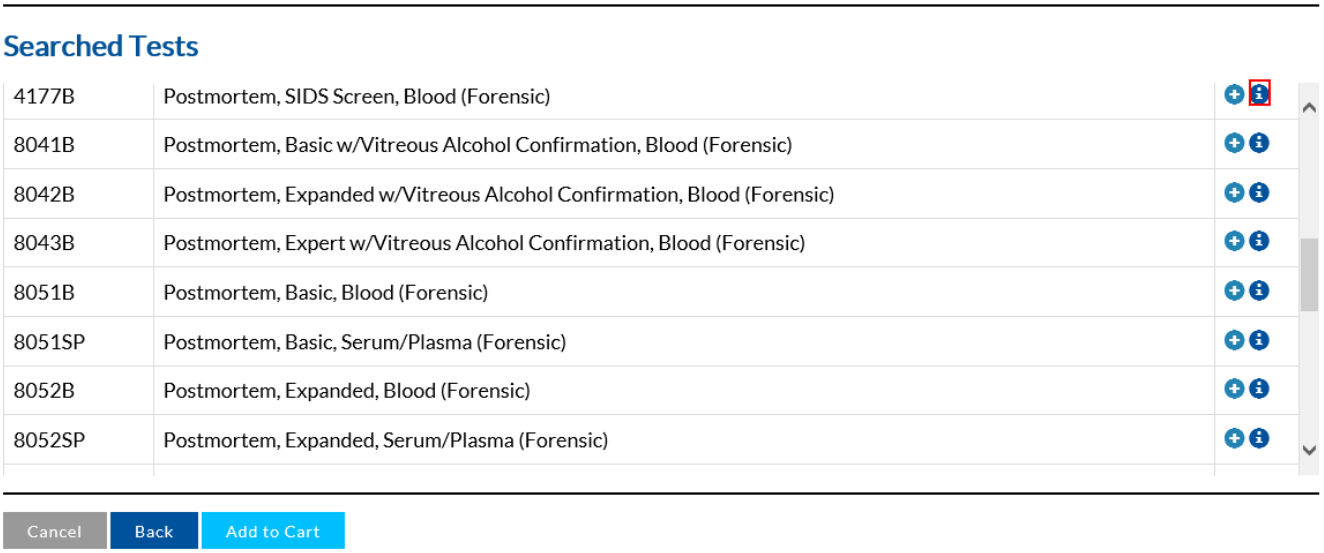
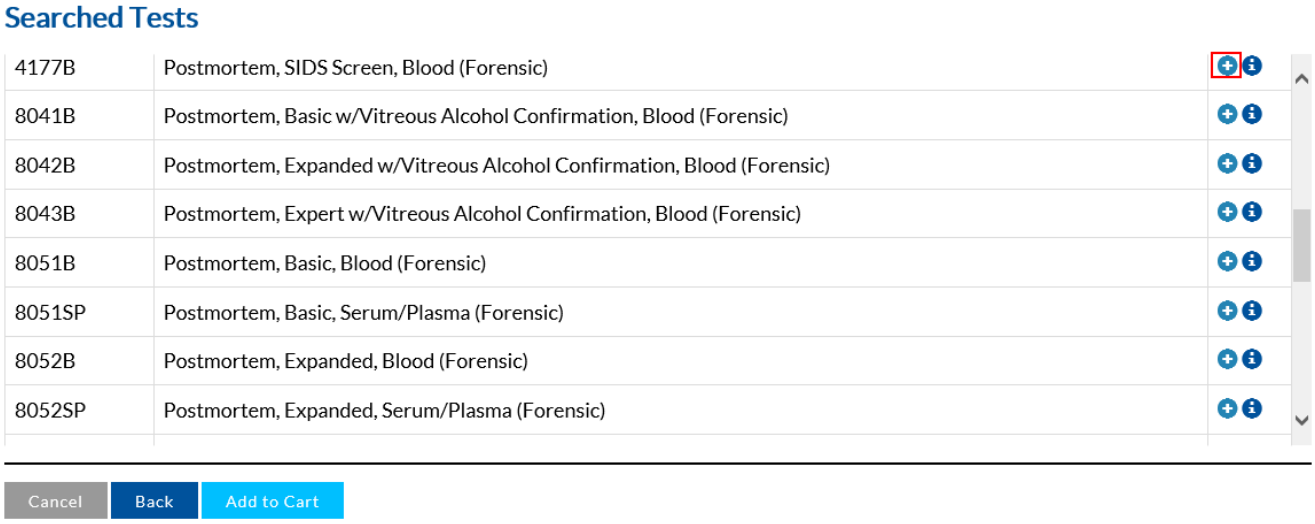
3. For additional information related to the test, click the **i** (information) button.



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



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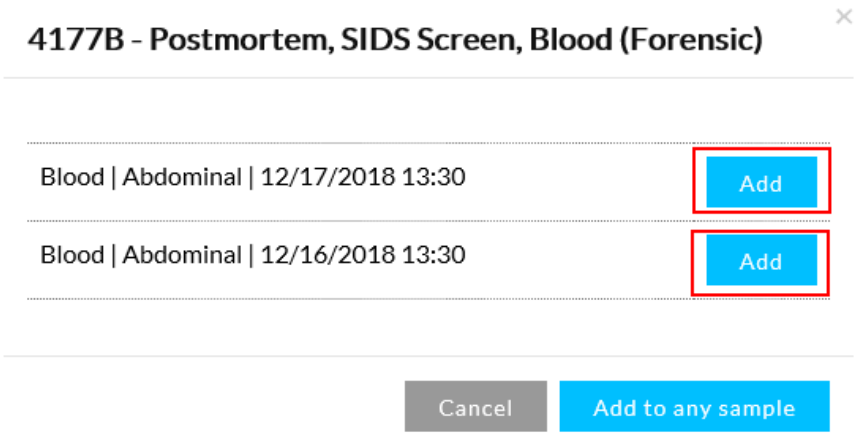
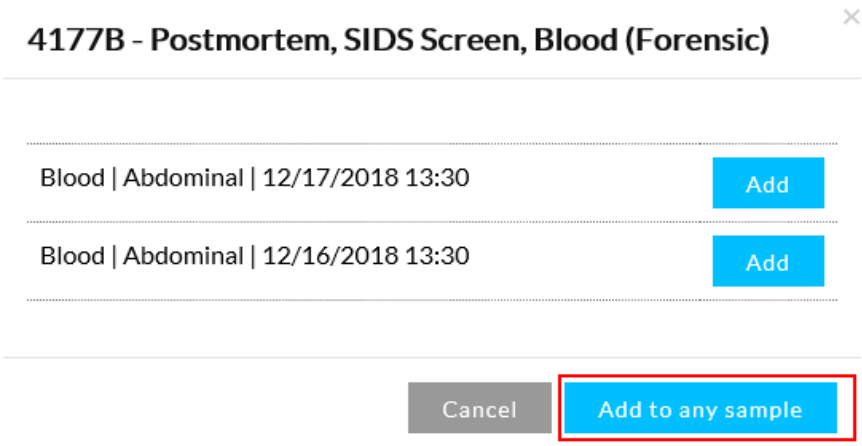
5. To Add a test to a specific sample click ‘Add’ next to the Sample.



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.



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.

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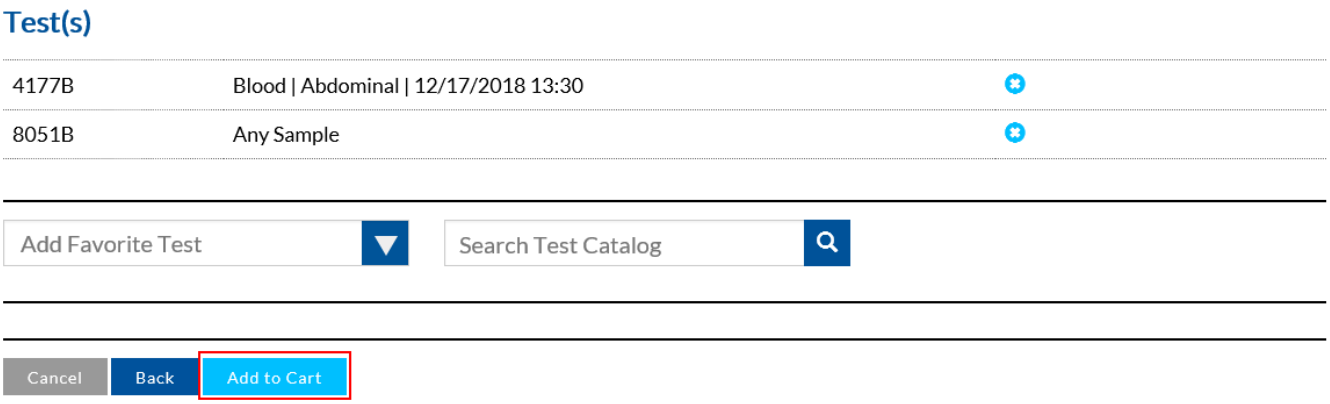
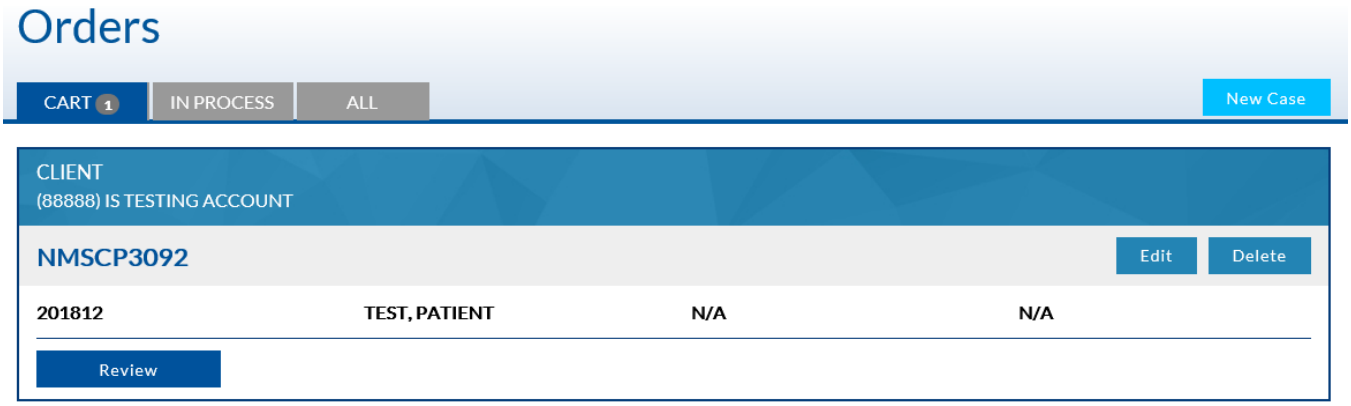


Multiple Cases

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

1. 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.



2. 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.

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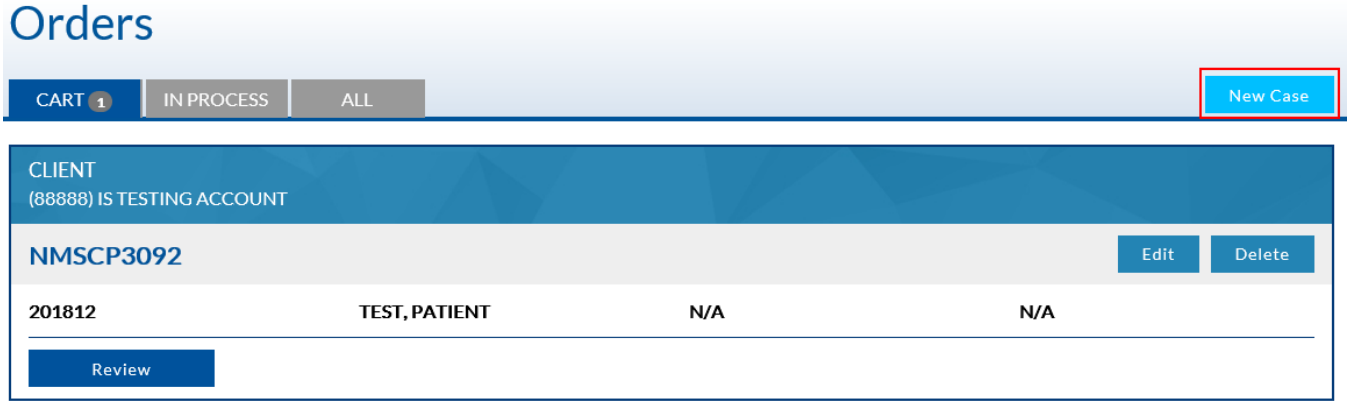
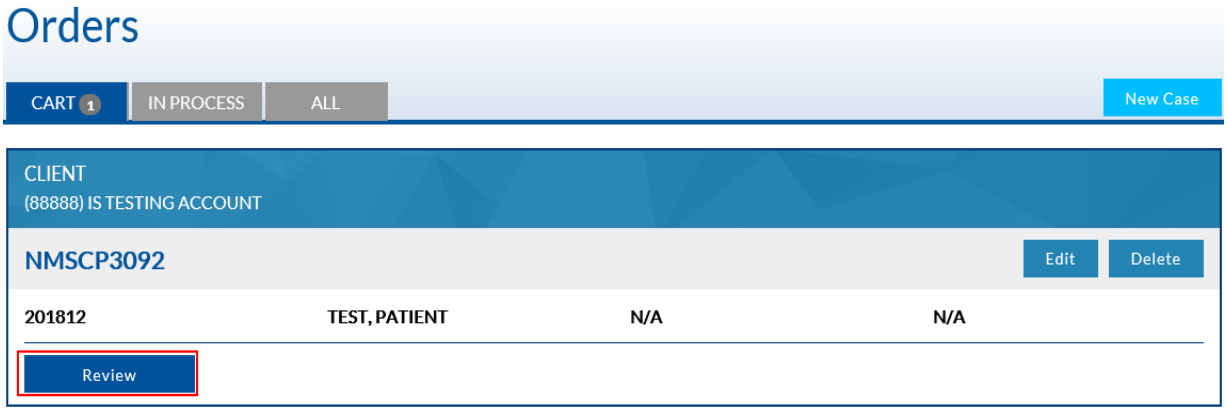


3. When all Case and Sample information have been entered click the **Review** Button.



Order Review

1 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.

2 To Edit Information on the Case, click the **Edit Case** button.

3 The Submit for Testing button will send the order electronically to NMS Labs.
- The Requisition will auto-generate.

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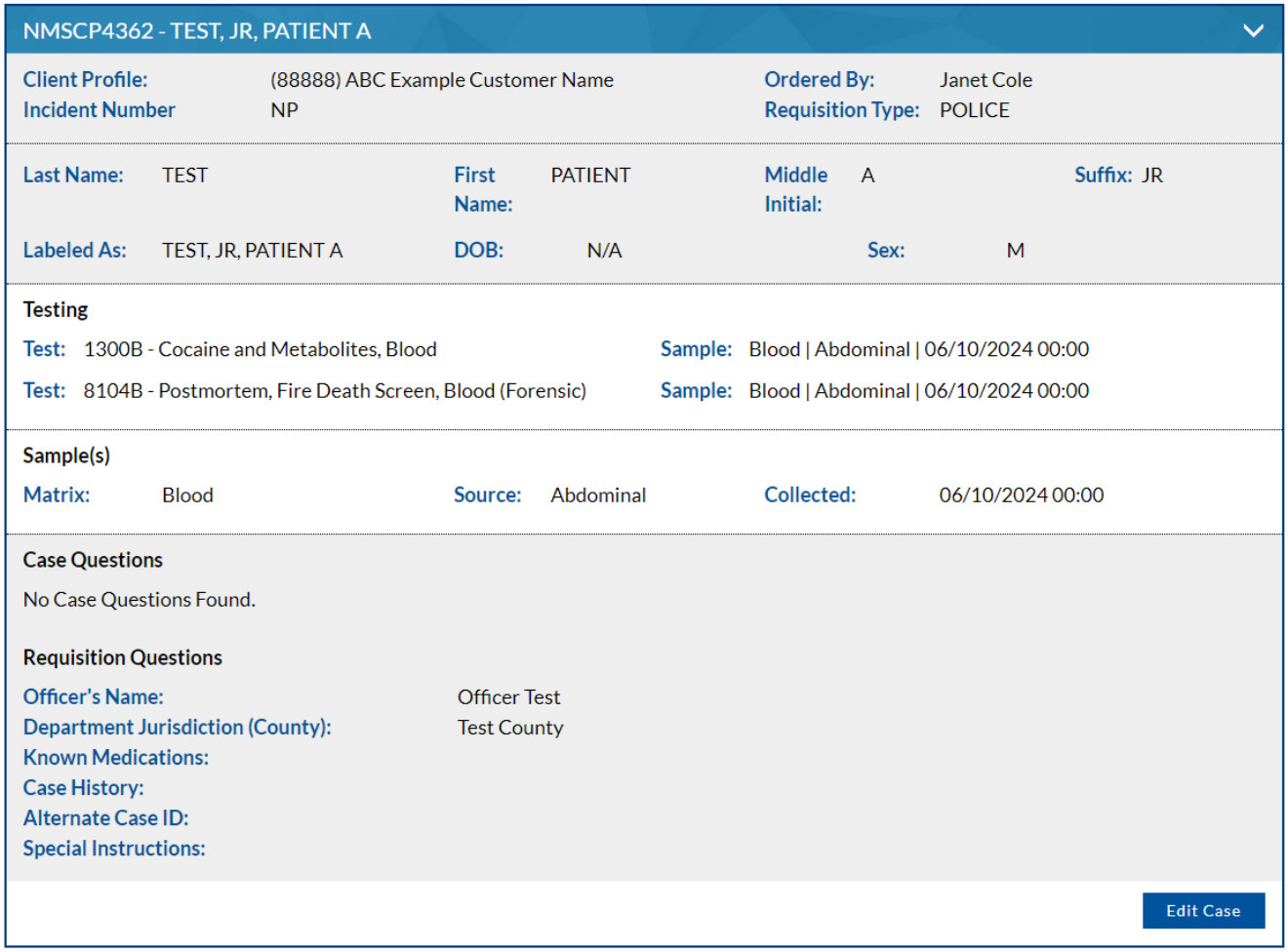
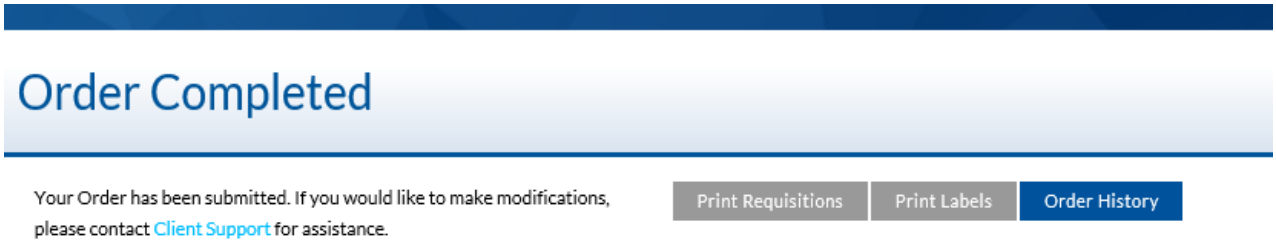


Important: If modifications are required after Submit for Testing button is clicked please contact the Client Services department.

4 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.



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

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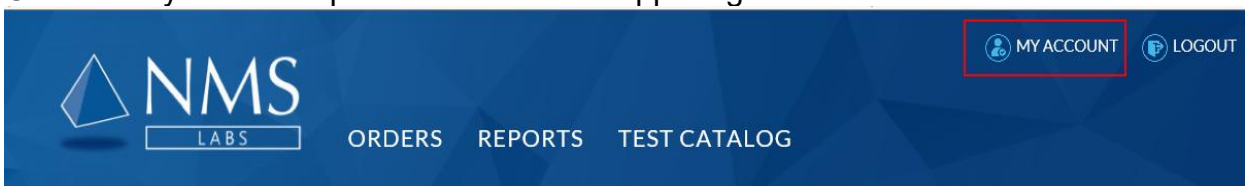
LABELS

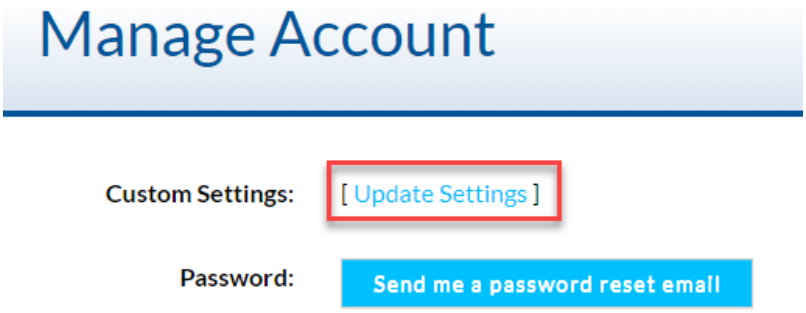
Setup Labels

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

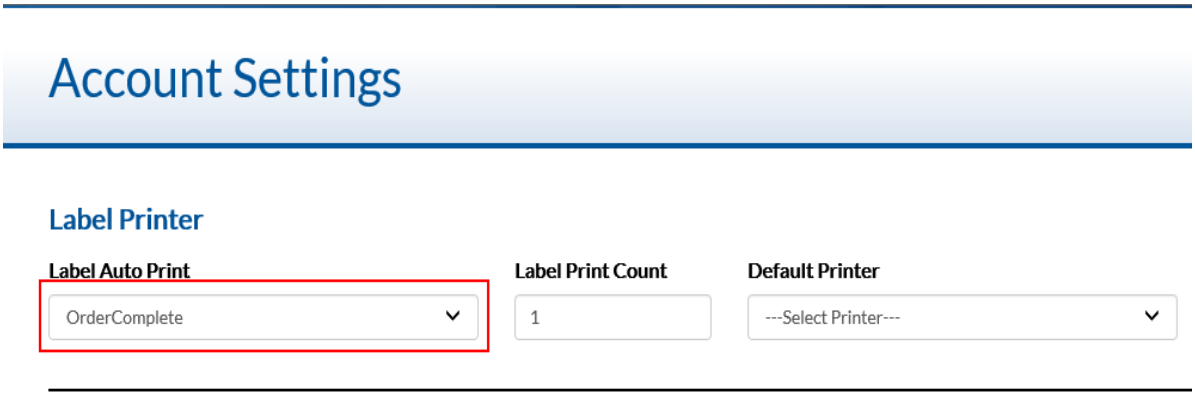


.

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 lables will auto-print with the completion of each sample entry.



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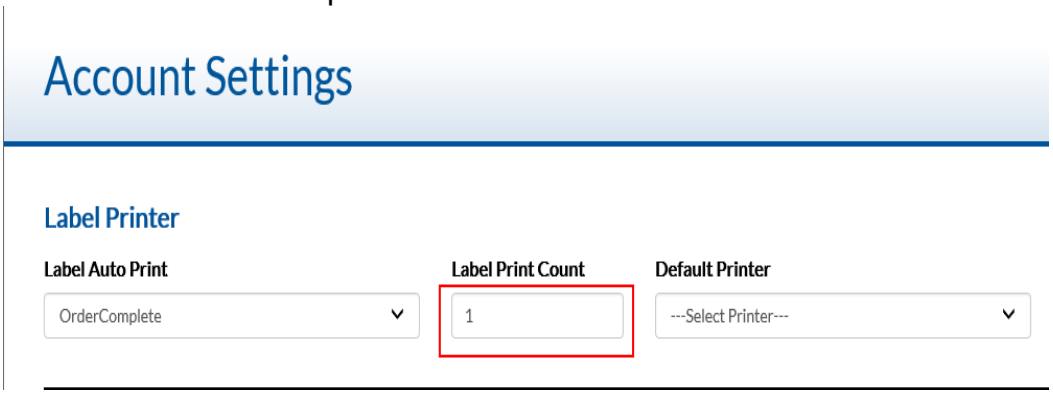
4. Enter the number of labels to print in the **Label Print Count** field.



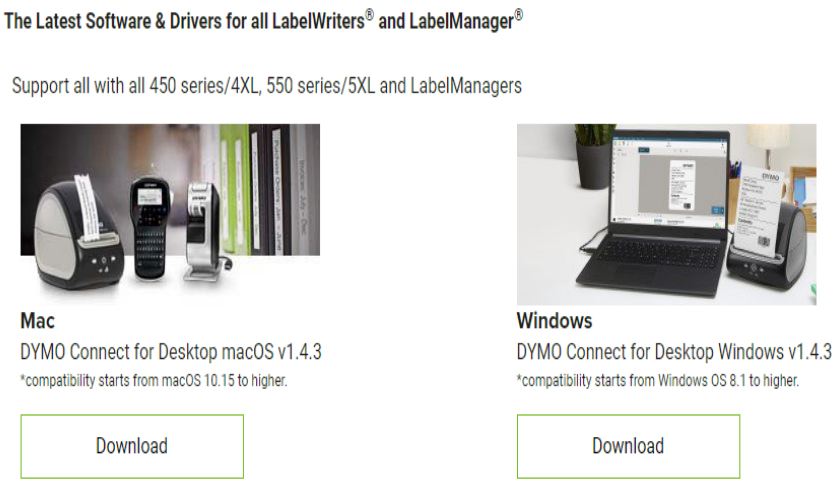
5. Select the Default Printer
   - NMS recommends use of the Dymo® LabelWriter® 450 model label printer and 1" x 2 1/8" size labels.

   - 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.



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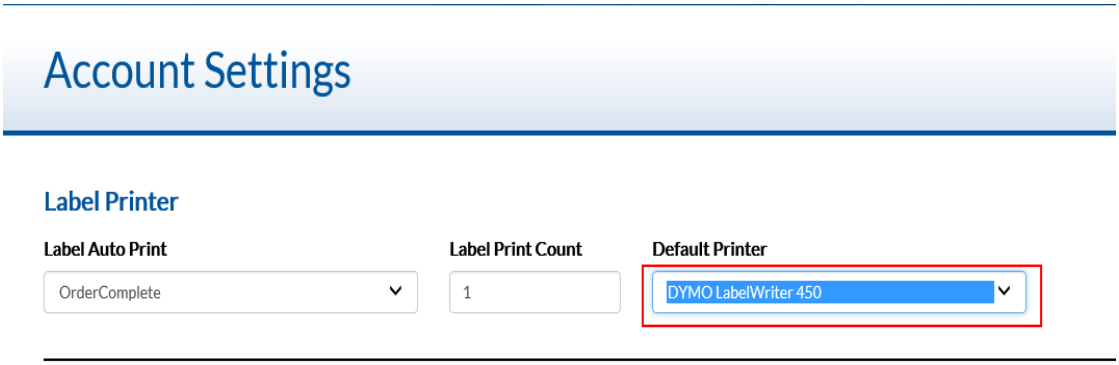
- After the installation is complete select the **DYMO LabelWriter 450** from the Default Printer field.
  Note: Recommend installing the DYMO version **8.7.3 or later**.
  The newest version of the software can be found here:
  http://download.dymo.com/dymo/Software/Win/DLS8Setup.8.7.3.exe

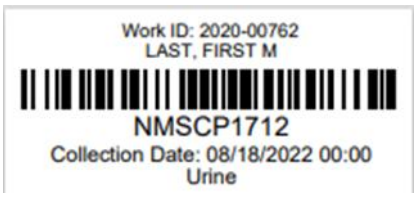


6. Click **Save Settings.**

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



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REPORTS

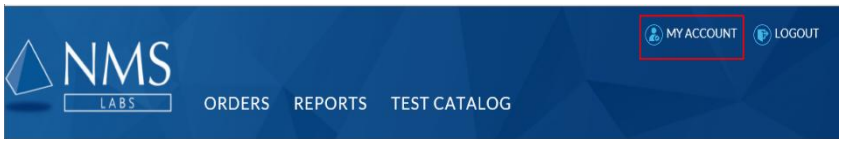
Authorized users will have access to a **Reports** tab upon logging into Client Portal. Depending on the level of access the user may have access to **Results, Litigation or Finance**.

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

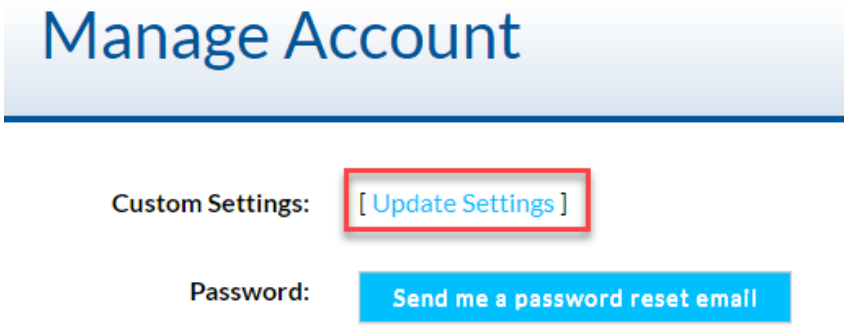
Report Options

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.**



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.

5. **Important:** When downloading a report, the system will automatically mark the report as **Read.** You may update your User Settings to remove this option.

6. 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.

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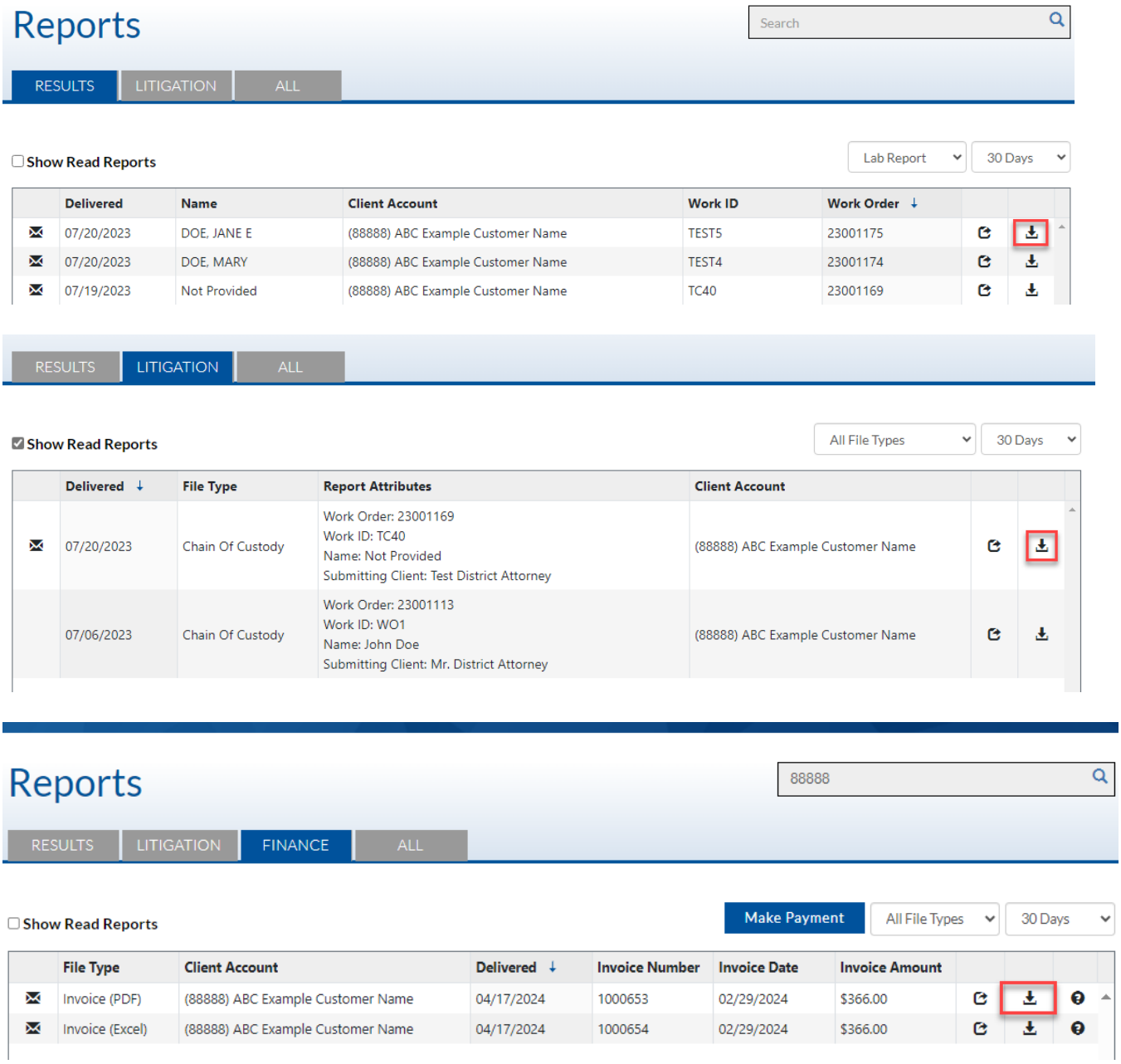
7. When searching for a report, check the **Show Read Reports** box so that all documents are evaluated.

8. Final reported results and Litigation Packets are supplied in an Adobe (.pdf) format.

View a Report

1. Click on the **download** symbol.



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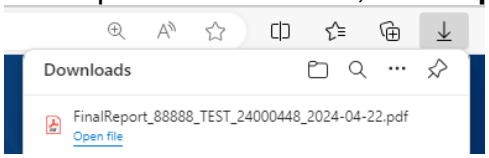
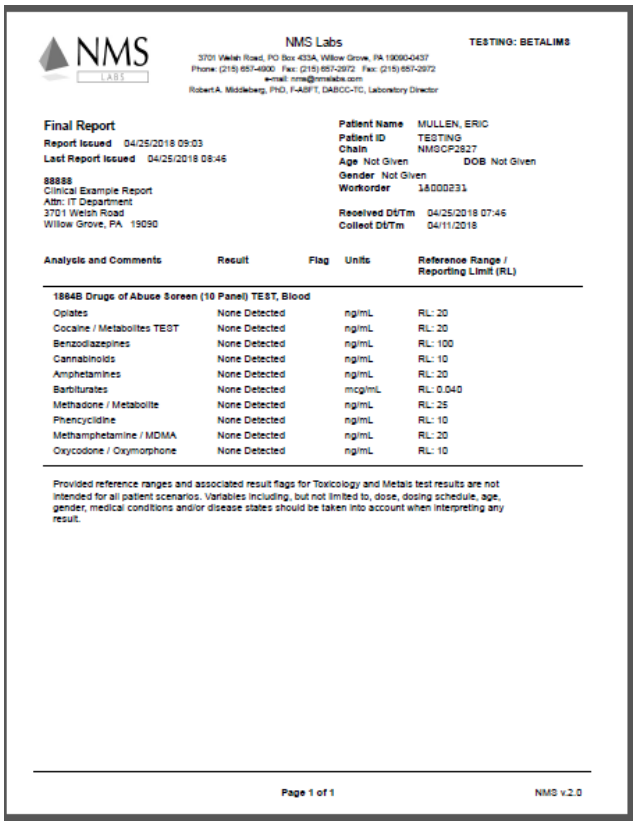
2. The report will Download, Click **Open file.**





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TESTING: BETALIM8

Final Report
Report Issued 04/25/2018 09:03
Last Report Issued 04/25/2018 08:46

88888
Clinical Example Report
Attn: IT Department
3701 Welsh Road
Willow Grove, PA 19090

Patient Name MULLEN, ERIC
Patient ID TESTING
Chain NMSCP2827
Age Not Given **DOB** Not Given
Gender Not Given
Workorder 18000231

Received Dt/Tm 04/25/2018 07:46
Collect Dt/Tm 04/11/2018

Analysis and Comments	Result	Flag	Units	Reference Range / Reporting Limit (RL)
1864B Drugs of Abuse Screen (10 Panel) TEST, Blood				
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 / Oxymorphone	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.

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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**.

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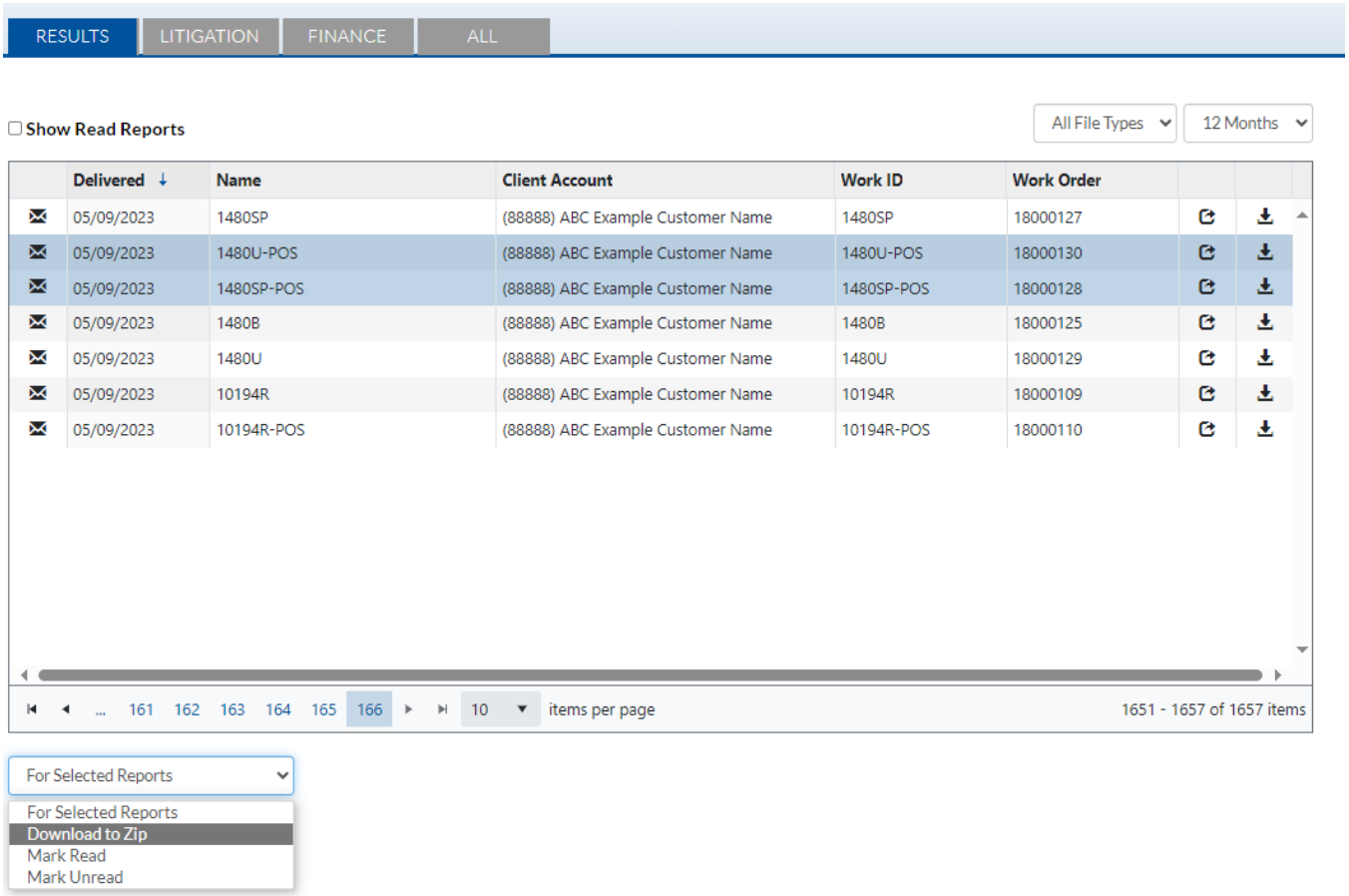
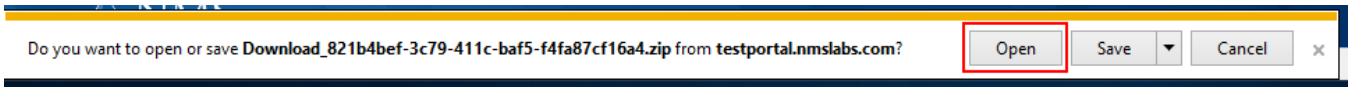
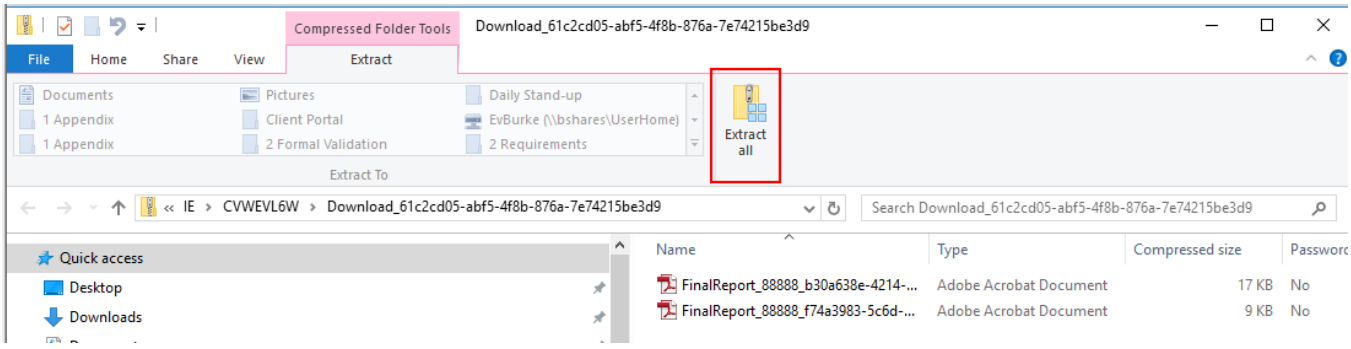


3. Click the **Open** option.



4. Click **Extract all**



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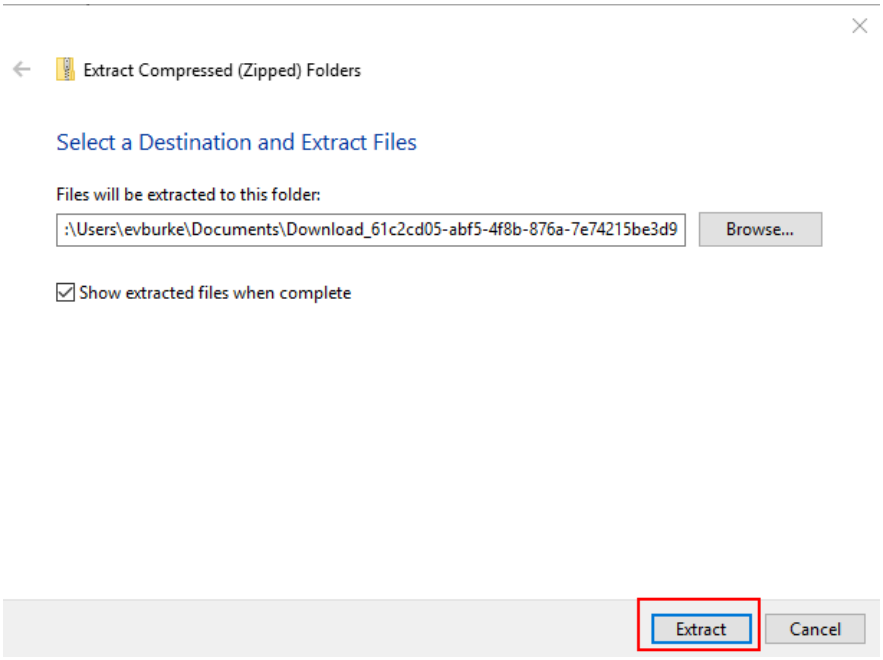
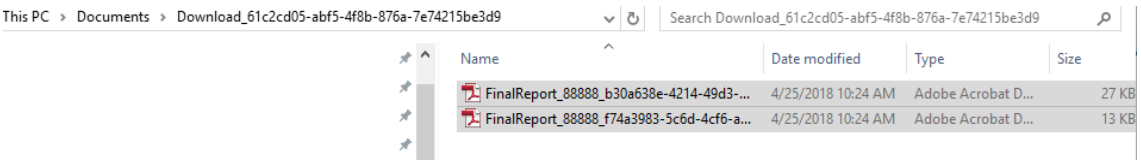
5. Click **Extract**.



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**.

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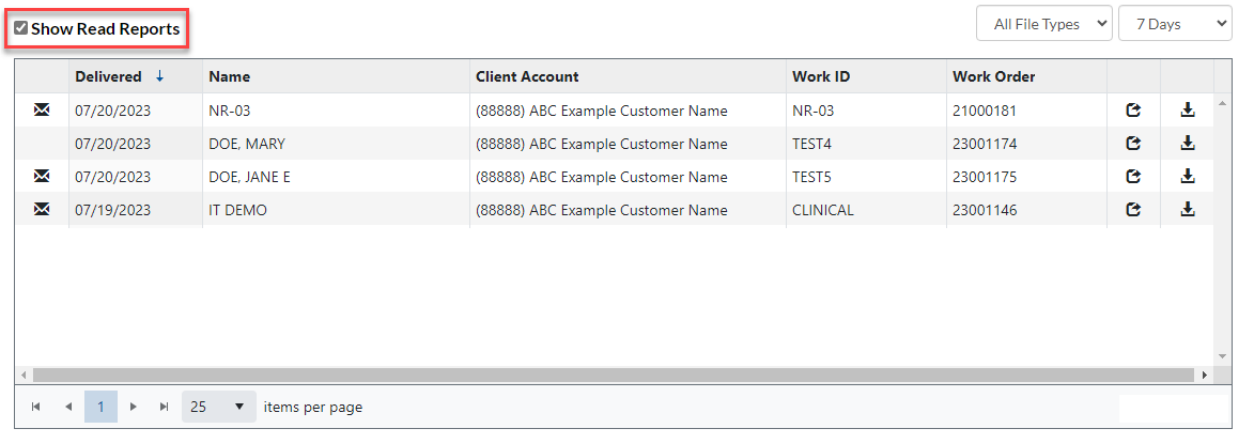
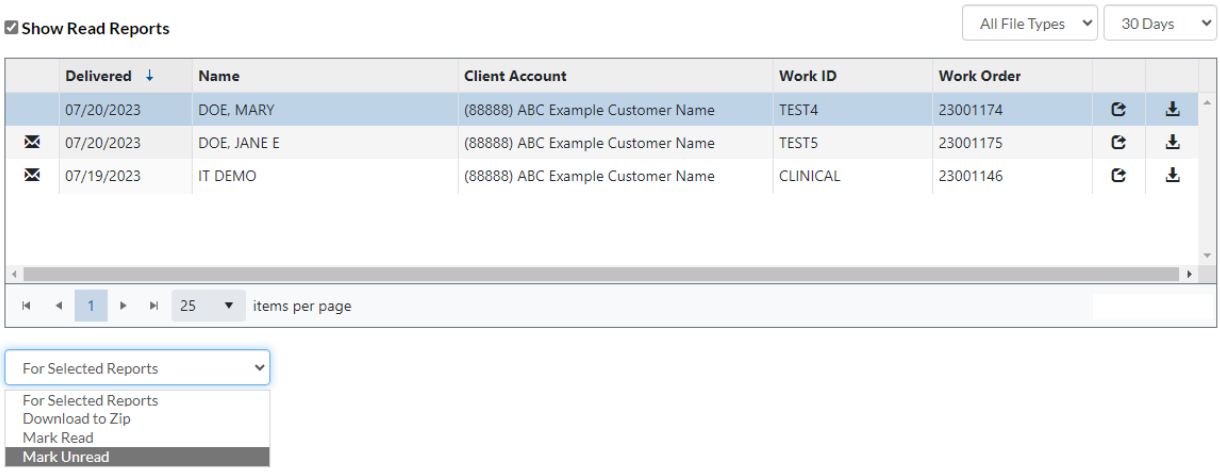


2. Select the report by clicking on the case ID or select multiple reports by using the keyboard **Ctrl Click** or **Shift Click** to select the reports for printing.

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



Invoice Payment

A payment link is available on the Finance tab.

1. Click the Make Payment button.

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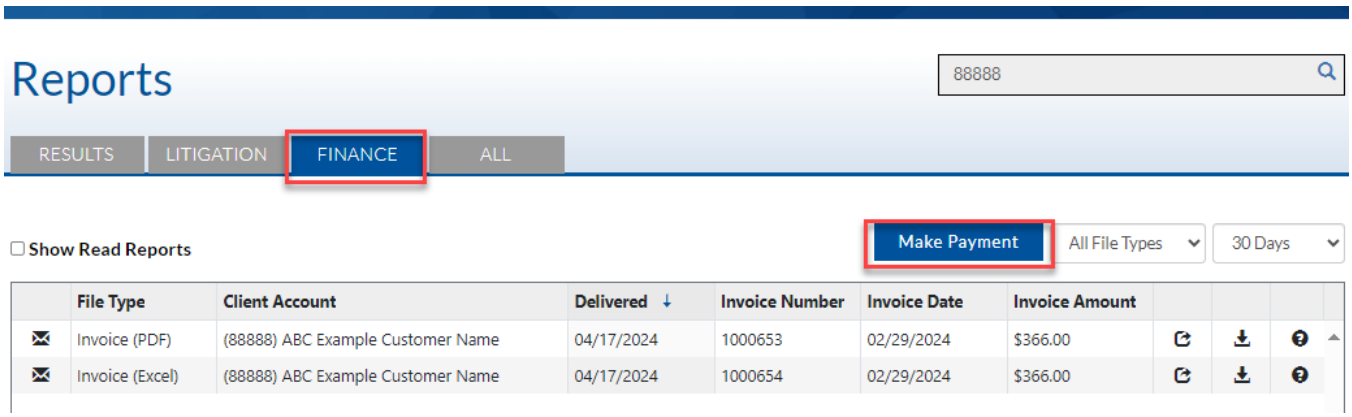
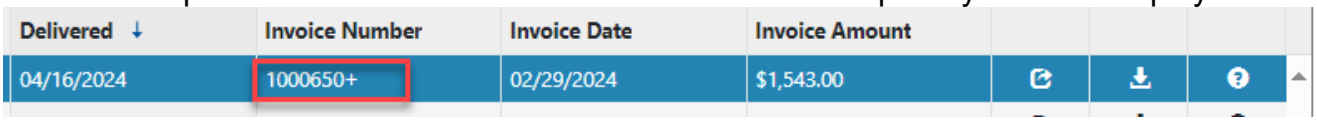


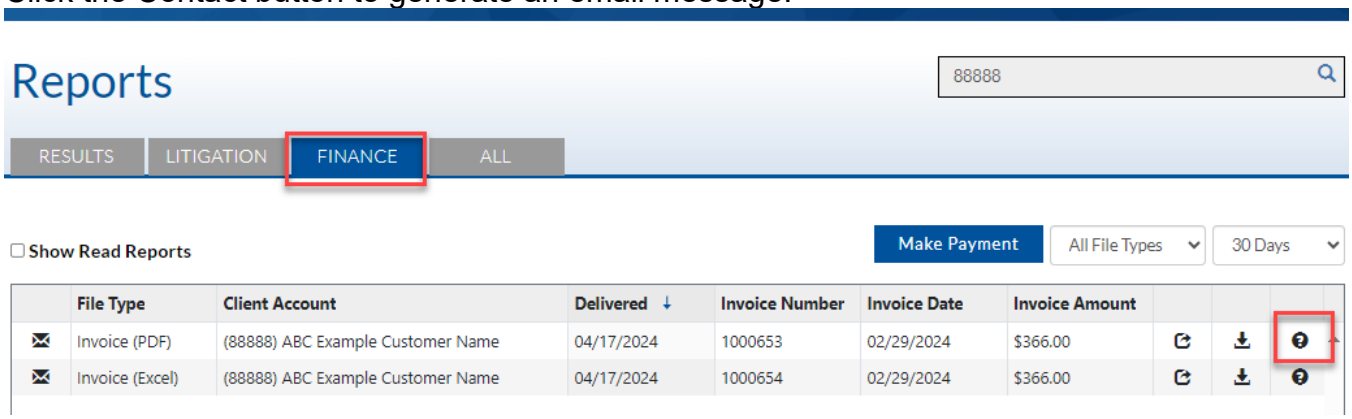
Invoice Inquiry

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



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.



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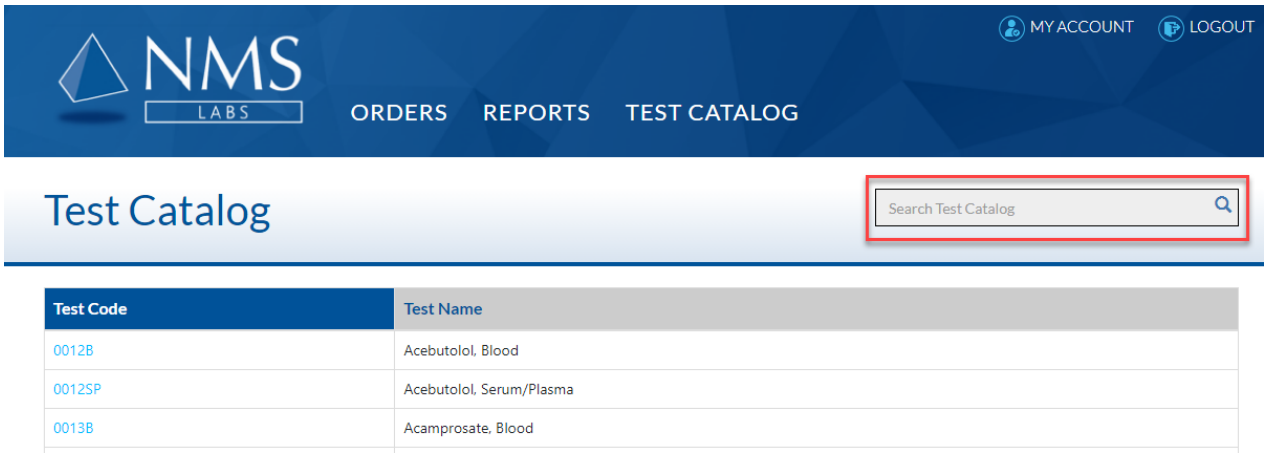
TEST CATALOG

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

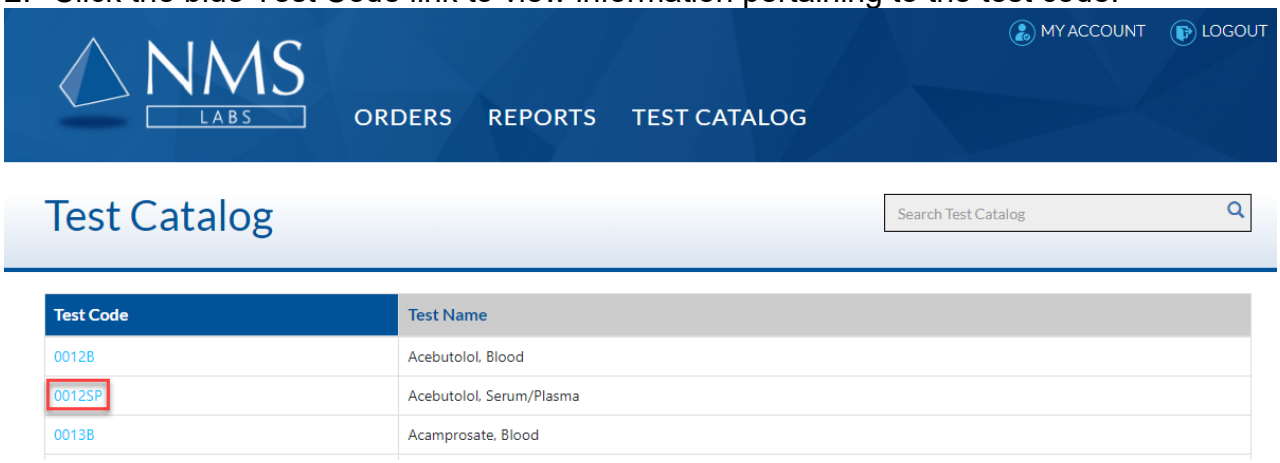
The Test Catalog access allows users to view test specific information.

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)



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



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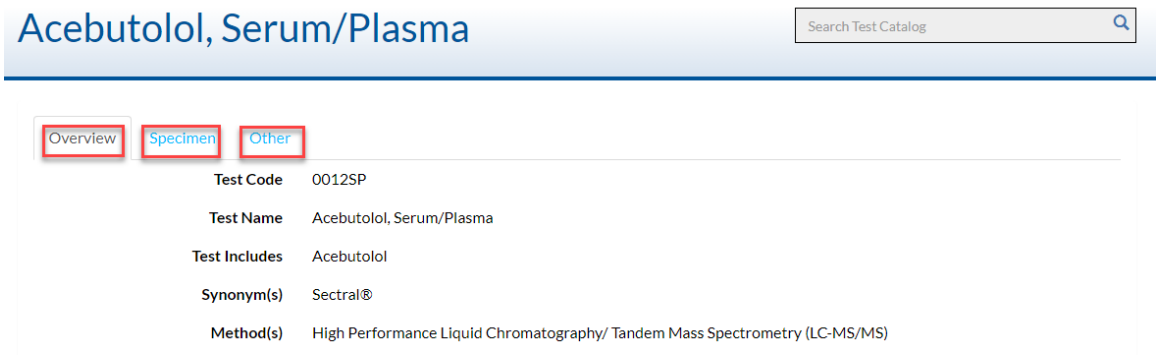
3. The information is organized in three tabs:
    - Overview: Test Code, Test Name, Test Includes, Synonym(s) Method(s) and Purpose
    - Specimen: Requested Volume, Minimum Volume, Transport Temperature, Specimen Container, Special Handling, Light Protection Required, Rejection Criteria, Stability
    - Other: Turnaround Time, Suggested CPT Code(s)



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