Maine Health and Environmental Testing Laboratory Electronic Test Ordering and Reporting Portal (ME-HETL ETOR)

User Manual

This document provides a quick overview of the Maine Test Ordering and Reporting Portal functionality. Its goal is to guide users in performing basic portal tasks like submitting test orders to the state lab, monitoring testing progress and accessing published reports.
This document provides a quick overview of the Lab Web Portal functionalities. Its goal is to guide you to perform basic portal tasks, like submitting test orders to the Maine Health and Environmental Testing Laboratory (HETL), monitoring testing progress and accessing published reports. Its content may differ in some details from some of the products described.

All information provided here is subject to change without notice.
IMPORTANT NOTE:
Your facility must have an approved account with approved users in order to have access to the Maine HETL web portal. You may determine if your facility has an account by clicking on CREATE ACCOUNT and typing in the facility name on the line designated for ORGANIZATION. The listing is alphabetical.

<table>
<thead>
<tr>
<th>Primary Phone *</th>
<th>Fax *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Details</td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td></td>
</tr>
</tbody>
</table>

**Welcome to Lab Web Portal (LWP)**

**The Production URL**

Access the Portal login page by using the following URL:
https://lwp-web.aimsplatform.com/me/
Click **Order Support** link at the bottom of the page to view lab contacts and information on where to send your specimens.

Click **Technical Support** link at the bottom of the page for technical support contacts.

**Create New Account**

Click **Create New Account** link under the **Login** button.

**Create New Account** page is displayed.
• Under the **Email** add an active email address. It will be used as a username.
• Complete the rest of the fields.
• Start typing the name of your submitting facility into **Organization** field to see if it already exists in the portal. If a match is found, select your facility from the popup list.
• Review “Term of Use” and “Privacy Policy” documents by clicking on the links. Check the boxes next to “Terms of Use”, “Privacy Policy” to agree. Agreement is required to request access.
• Click on **Create Account** to complete user registration process. A New User registration request will be sent to the portal administrator for approval.
• Once the request is approved, the user will be notified via email and will be able to login to the portal.
Once approval has been obtained, navigate back to the login page, type in the username and password and click on LOGIN button to access the Portal.
Navigating the LWP

The Navigation Panel

Dashboard is the first page you will see after logging into the Portal. It is the “control center” of the LWP where you can view key performance indicators and charts, track status of the existing test orders, and view published patient reports. The Dashboard is editable: click on the upper right corner, next to your name.

Incomplete Orders – started, but not yet submitted orders.

In Transit Orders – orders that have been submitted but not yet received by the lab.

All Orders – all samples submitted by user organization regardless of status;

Published Reports – orders with published reports. Shows all orders with published reports per user organization. Orders with unread (not viewed) reports are shown in bold; orders with read (viewed) reports are shown in normal font;

My Patients – view your patients’ list;

Help - view portal help.

Collapse the Navigation Panel by clicking the button next to the logo in the upper left corner. This functionality applies to other pages in the portal as well.

NOTE: Not every user role has access to all the options.
The Call-to-Action buttons
There are 3 blue buttons on the bottom left side of the Navigation Panel.

Order Tests – order SARS-CoV-2 test using a preconfigured Test Requisition Form;
View Reports – view all “unread” reports published for user organization;
Batch Uploads - upload multiple test orders at once.

The Tiles
The tiles you see on your Dashboard are your counters and key performance indicators.
Click to open relevant data grids.
Number on top indicates total number of published reports for user organization
Progress bar indicates percentage of the “viewed” reports vs. “not viewed”.

User Drop-Down Menu - Profile
The drop-down menu on the upper right corner (your name) offers additional resources.
- Personal Info – view and edit your personal information by clicking on Profile in the dropdown menu after clicking on your name.
- **Manage Notifications** - add personal preferences for Portal notification events;

- **Change Password** – use to change your password.
- **News** - view portal news/announcements.
- **Log out** – to log out of Portal
1. Order Tests

Test Requisition Form (TRF)

a. Click ORDER TESTS Call-to-Action button
b. Choose the “Maine COVID-19” form to order tests;

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

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

- **Patient Information section of TRF:** type the patient’s name in “Last name”
- **If the patient is already in the database,** a selection can be made from the drop-down options;

Note: Confirm the DOB match to your patient’s information
c. **Search** – open more detailed lookup;

d. **Add** – if you confirmed that the patient is not in the system by using the detailed lookup, add a new patient with the + icon.

A new screen will appear to allow for adding a new patient.

Use “Add new patient” form to enter all the necessary patient information and click **Submit**. New patient will be added to the system and related information propagated to the main form.
Edit Patient information by clicking on "icon.
Delete selected patient information by clicking on " icon.

- **Submitter Information section of TRF:**
  Health Care Facility Name: will be based on your facility affiliation. If you are affiliated with a single facility the name will automatically be displayed. If you are associated with multiple facilities, you can choose one associated with the test order by clicking the **magnifying glass** button, selecting a facility in the lookup and clicking **Apply**.

- **Ordering Provider:** An ordering provider name along with associated NPI# must be entered before continuing. Begin by typing in the name of the provider. If the clinician exists in the database for your facility, a listing will appear. Clicking the **magnifying glass** button will bring up all the provider names currently available. Add a new provider with the **+** icon. The NPI# must be entered along with the name.

For Universal Testing Orders, use Dr Siiri Bennett, with NPI# 9999999999.
- **Specimen Information section of TRF:**
  Select **Specimen Type** from the list of available values; Choose the Collection Date from Calendar icon or type the desired date and time.

- **Additional comments section of TRF**
  Add additional information if necessary

  e. Click **Submit** button upon the completion to submit your order.
  **Note:** If any of the required fields are not populated or populated incorrectly, an error will appear to show the missing fields. User can click on any field in the dialog and get navigated to the exact field on the form to correct the issue.
Once test order is ready to be submitted, “Certification of Test Order” message is displayed. User needs to click AGREE to move forward.

**Certification of Test Order**

By submitting this order for testing, I hereby certify as follows:

- The ordering provider is an individual authorized under State law to order tests or receive test results, or both.
- I certify that the information submitted is true and correct to the best of my knowledge.

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

Hospitalized?
Answer *
- Yes
- No

If Yes, Facility Name?
Answer

Health Care Worker?
Answer *
- Yes
- No

NOTE FOR SWAB AND SEND SITES:
Under ADDITIONAL COMMENTS
Please enter “Swab and Send” followed by site location.
Ex.: Swab and Send – Lewiston
This will help us identify that your facility is a Swab and Send Site
Once test order has been submitted, a confirmation message is displayed.

**Note:** The Portal Order ID (in bold below) uniquely identifies the test order in the system.

1. **Order Placed**
   - Your test order **OIDL200000012** has been successfully submitted. Please check All Specimens section of your Dashboard for status updates.
   - Click Print button below to view/print the completed submission form.
   - Click Copy Order button to apply current order information to the new order.

2. - Click **Copy Order** to continue adding more orders for your facility. It will copy all the information from the current order except patient information
   - Click **Print** button to print the Order manifest in a pdf format.
     **Note:** the barcode in the upper right corner represents the Portal Order ID.

**A printed copy of the submission form MUST always accompany the specimen.**

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

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

- Click the **Save Order** button in the bottom right corner of the Test Order form.

- Click **Yes** in the dialog below.
Confirmation message is displayed.

Note: The Portal Order ID uniquely identifies test order in the system.

Order saved

Your test order has been saved as OIDIL200000013 in Incomplete Orders.

The saved order will be placed in the Incomplete Orders. A navigation link will be accessible on the Dashboard.
To retrieve the saved order, go to the Incomplete Orders navigation link, locate the order record and click on it. To discard saved order, click on icon.
**Batch Upload**

NOTE: For facilities using a “csv” file to import into Excel Spreadsheet template, please see APPENDIX 1

Upload multiple test orders at once.

Download the **Import Template** that has all the required fields and response options required for the Batch Upload prior to specimen collection and submission. This is important in order to correctly gather the required order fields and patient information.

**To Download the Excel Spreadsheet**

a. Click **BATCH UPLOAD** button on the Dashboard.

   **IMPORTANT NOTE:** **ALWAYS** download the batch upload template for every use. This ensures that the most up to date template is being used.

b. Click the 3-button link on the upper corner of the tile.

c. Select **Download Import Template** from the two menu options.
d. Select **OPEN** once the box at the bottom of the screen appears.

![Image showing the option to open a file]


e. Click on “Enable Editing” button at the top of the sheet in order to begin using the template.

![Image showing the Enable Editing button]

f. Enter the required information. Enter one line in the sheet for each specimen being submitted.

g. **REQUIREMENTS** of the Batch Upload template:
   ❖ All fields in red are required.
   ❖ If a red field(s) is missed in the **Patient Information**, **Submitter Information** or **Physician** sections, no data will be imported for that section.
   ❖ If a red field(s) is missed in the **Patient Information**, **Insurance Information** neither section’s data will import.
❖ If a field has a dropdown menu, select from the menu options ONLY. Do not type in these fields.
❖ Ensure correctness of information entered on the Excel spreadsheet PRIOR to upload.
❖ Ensure that only copy and paste is used to quickly enter the same information for many samples. DO NOT USE “fill down” functionality of Excel.

h. The Excel Spreadsheet may now be filled with the required details in each field. 
   **Note: there are dropdown menus for some of the required values.**
i. Enter one line of data for each specimen that is being submitted.
j. Requirements of the **Batch Upload template:**
   o All fields in **RED** are required
   o **ALWAYS** download the template for every use. This ensures the most up to date version is being used.
k. Once the spreadsheet has been filled, SAVE to approved facility folder.
1. Go back to the Dashboard, click on the 3-button link, then choose **Import from File**.

![Dashboard Image](image)

m. Choose the appropriate file for upload, then click **OPEN** button.

n. Specimen and patient information should now show in the Portal grid.

**NOTE**: If errors occur a message will appear to indicate a problem. Close the message box and correct the errors. The file can then be submitted.
Submitting Orders and Printing Submission Forms

a. Once portal information is uploaded with no errors to correct, click on SUBMIT at the bottom right of the screen.

b. A message box will appear to verify submission of file. Click on SUBMIT.

A printed copy of the submission form MUST always accompany the specimen.
c. Go back to the Dashboard.
d. Click on IN TRANSIT ORDERS button.

e. Select the records that are associated with the samples that will be sent to the Maine HETL.
f. The SELECT ALL feature can be used by clicking on the box in the top left corner.
g. Click on the Printer Icon.

h. A message box will appear. Click on SAVE.

i. Click on OPEN.

A report box will appear to provide the option to print out the submission forms. The forms can be printed out all at the same time, as long as they were check marked at the beginning of the process.
Accessing Orders, Reports and Patients

Tracking Order Status

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

f. InTransit – order has been submitted but not yet received by the lab
g. ReceivedInLab – order has been received in lab but not yet tested
h. InProcess – order is being tested by the lab
i. Released – testing is done, order is released, results reports published
j. Canceled – order is canceled

To view order related events across time, open All Specimens grid, locate your order and hover over icon:

<table>
<thead>
<tr>
<th>Collected</th>
<th>Submitted</th>
<th>Received</th>
<th>In Process</th>
<th>Published Report</th>
<th>Viewed Report</th>
</tr>
</thead>
</table>

Viewing Reports

To view new (i.e. unread) published reports, click VIEW REPORTS button in the navigation bar.

The Unread Reports grid is displayed.

k. Not viewed orders are displayed in bold.
l. Once report has been viewed, the order disappears from the Unread Reports grid and moves to the Published Reports grid.
Click on icon to view all published patient reports associated with an order.

**Note:** Latest report always appears on top.

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

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

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

Populate Subject, Email addresses, Message and click Submit.

**Note:** recipient will get temporary access to the portal to download shared reports. To download or share multiple patient reports at once, select multiple orders and then click on to download a single PDF with multiple patient reports or to share multiple patient reports at once. Results Reports can also be viewed in the **All Specimens** data grid.
### Data grids

Click on any column in the grid to order by it. To order by multiple columns, click and hold Shift and click on the columns to order.

Click on the icon to pin one or multiple columns to the left side of the grid.

<table>
<thead>
<tr>
<th>SPECIMENID</th>
<th>LIMSACCESSIONID</th>
<th>PATIENTNAME</th>
<th>PATIENTDATEOFBIRTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>OIDLE20000059</td>
<td>C20000212MB01</td>
<td>Cruise, Tom</td>
<td>02/02/1963</td>
</tr>
<tr>
<td>OIDLE20000058</td>
<td>C20000211MB01</td>
<td>SNAKE, SILLY</td>
<td>02/06/2013</td>
</tr>
<tr>
<td>OIDLE20000057</td>
<td>C20000210MB01</td>
<td>ana, nana</td>
<td>02/02/2000</td>
</tr>
<tr>
<td>OIDLE20000056</td>
<td>C20000209MB01</td>
<td>Silly, Sling R</td>
<td>04/12/1977</td>
</tr>
<tr>
<td>OIDLE20000053</td>
<td>C20000208MB01</td>
<td>Washington, George</td>
<td>03/10/1941</td>
</tr>
</tbody>
</table>
Quick Search
Use “Quick Search” box at the top to search across all columns in the grid:

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Name</td>
<td>Contains</td>
<td>Golovkin</td>
</tr>
<tr>
<td>Submitted</td>
<td>Greater Or Equals</td>
<td>11/18/2019</td>
</tr>
</tbody>
</table>

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

Use the SAVE button to save filters for repeated searches.

Patient Information
To access your patients at any time, click on My Patients link in the navigation bar. Search and click on the patient record to open patient information page.
Note: Patient page can also be accessed from All Specimens grid by clicking on a Patient Name link. Patient Demographics page – displays patient demographic information. Information can be edited and saved. Orders – displays all submitted orders for the patient. In addition to being patient specific, orders are also filtered by organizations to which the user has access.
APPENDIX 1

Use of csv file to import data into HETL Lab Web Portal

1. Open the CSV template (provided upon request) when new account was created

2. The first three rows MUST not be deleted or modified. This information will allow data to transfer properly.
3. Transfer data from the facility database to the CSV file.
4. Save file with unique file name, using .xlsx for Excel spreadsheet.
5. File may now be uploaded into Lab Web Portal.