Navigation quick guide

Employer Solutions Portal (ESP)

ESP saves you time with order templates that populate your most common ordering criteria such as account number or drug test code. It also dramatically improves the way that you review your drug test results. This navigation quick guide will help answer some common questions regarding where to find specific functionality within the portal.

ORDERING

Create an Order

1. Click the New Order link located on the left navigation.
2. Enter in the donor's personal information which includes the following required information: Primary ID (this can be a social security number, employee ID, driver license number, etc.), First Name, Last Name and Primary Phone. The optional information (not required) includes the following: Middle Name, Secondary Phone, Date of Birth and Gender.
3. To select an account number for this order, start typing the account name or number in the account entry field and select from the list or select the checkbox next to the account.
4. Click on the *Select the Reason for Test* button from the drop down.
5. Select the *Test Type* order code.
6. Enter the site code into the Collection Site field or select the search link to search for a collection site. If searching for a collection site, indicate the distance you want to search by, enter in the zip code and click search to locate a site that will perform the collection.
7. The time zone should accurately display based on the selected collection site location. If a collection site isn't selected, the time zone will default to the account location selected.
8. Select the appropriate order expiration.
9. Enter any special instructions that you want to call to the attention of the specimen collector.
10. Click *Submit* at the bottom of the order page.

After creating an Order, you will have the ability to:

1. Save your QPassport to a PDF file.
2. Edit your Order.
3. Print the QPassport.
4. Email the QPassport Form.

RESULTS

Change Order Expiration

1. Click on the *Results* link on the left navigation.
2. Enter in the Primary ID or other information and click *Search.*
3. Click the + on the left side of the record that matches the search criteria.
4. Click on the QPassport number (If the link is not active or does not take you to the order, then the specimen is being collected or has been collected. Only drug and breath alcohol screen orders that have not begun the collection process can be edited).
5. Click on the *Edit* button.
6. Scroll down to the Timing Information part of the order which is usually toward the bottom.
7. Click the new order expiration.
8. Scroll down to the bottom of the page and click the *Submit* button.
9. The updated order can then be emailed or printed by clicking on the buttons at the top of the QPassport form and given to the donor.

Email Order

1. Click on the *Results* link on the left navigation.
2. Enter in the Primary ID or other information and click *Search.*
3. Click the + on the left side of the record that matches the search criteria.
4. Click on the QPassport ID number (If the link is not active or does not take you to the order, then the specimen is being collected or has been collected. Only drug and breath alcohol screen orders that have not begun the collection process can be edited).
5. Click the *Email* button.
6. Enter in the 'To' email address, subject and email text.
7. Click the *Submit* button.

Print Order

1. Click on the *Results* link on the left navigation.
2. Enter in the Primary ID or other information and click *Search.*
3. Click the + on the left side of the record that matches the search criteria.
4. Click on the QPassport ID number (If the link is not active or does not take you to the order, then the specimen is being collected or has been collected. Only drug and breath alcohol screen orders that have not begun the collection process can be edited).
5. Click the *Print* button at the top part of the QPassport form.
   Click the print location and click *Submit.*

Change Donor Information

1. Click on the *Results* link on the left navigation.
2. Enter in the Primary ID or other information and click *Search.*
3. Click the + on the left side of the record that matches the search criteria
4. Click on the QPassport ID number (If the link is not active or does not take you to the order, then the specimen is being collected or has been collected. Only drug and breath alcohol screen orders that have not begun the collection process can be edited).
5. Click on the E*dit b*utton.
6. Change the Donor Information.
7. Scroll down to the bottom of the page and click the *Submit* button.
8. The updated order can be emailed (click on the *Email* button at the top of the QPassport form) or printed (click on the *Print* button at the top of the QPassport form) and given to the donor.

Change Account Information

1. Click on the *Results* link on the left navigation.
2. Enter in the Primary ID or other information and click *Search.*
3. Click the + on the left side of the record that matches the search criteria.
4. Click on the QPassport ID number (If the link is not active or does not take you to the order, then the specimen is being collected or has been collected. Only drug and breath alcohol screen orders that have not begun the collection process can be edited).
5. Click on the E*dit b*utton.
6. Select the desired account by either entering the account name or number in the account entry field. Then select from the list or select the checkbox next to the account in the window.
7. Scroll down to the bottom of the page and click the *Submit* button.
8. The updated order can be emailed (click on the *Email* button at the top of the QPassport form) or printed (click on the *Print* button at the top of the QPassport form) and given to the donor.

Change Reason for Test

1. Click on the *Results* link on the left navigation.
2. Enter in the Primary ID or other information and click *Search.*
3. Click the + on the left side of the record that matches the search criteria.

4. Click on the QPassport ID number (If the link is not active or does not take you to the order, then the specimen is being collected or has been collected. Only drug and breath alcohol screen orders that have not begun the collection process can be edited).
5. Click on the E*dit b*utton.
6. Scroll down the page to the *Reason for Test* section and click on the Reason for Test radio button.
7. Scroll down to the bottom of the page and click the *Submit* button.
8. The updated order can be emailed (click on the *Email* button at the top of the QPassport form) or printed (click on the *Print* button at the top of the QPassport form) and given to the donor.

Change Test Type

1. Click on the *Results* link on the left navigation.
2. Enter in the Primary ID or other information and click S*earch.*
3. Click the + on the left side of the record that matches the search criteria.
4. Click on the QPassport ID number (If the link is not active or does not take you to the order, then the specimen is being collected or has been collected. Only drug and breath alcohol screen orders that have not begun the collection process can be edited).
5. Click on the E*dit b*utton.
6. Scroll down the order page to the Test Type section and select the desired test type from the drop down.
7. Scroll down to the bottom of the page and click the S*ubmit b*utton.
8. The updated order can be emailed (click on the *Email* button at the top of the QPassport form) or printed (click on the *Print* button at the top of the QPassport form) and given to the donor.

Change Collection Site

1. Click on the *Results* link on the left navigation.
2. Enter in the Primary ID or other information and click *Search.*
3. Click the + on the left side of the record that matches the search criteria.
4. Click on the QPassport ID number (If the link is not active or does not take you to the order, then the specimen is being collected or has been collected. Only drug and breath alcohol screen orders that have not begun the collection process can be edited).
5. Click on the E*dit b*utton.
6. Scroll down to the Collection Site section of the order.
7. Click the *Search* link.
8. Enter in the radius or distance you want to search for a collection site.
9. Enter in the zip code area of the search.
10. Click *Search.*
11. Click the *Select Site* link to select a collection site.
12. Scroll down to the bottom of the page and click the *Submit* button.
13. The updated order can be emailed (click on the *Email* button at the top of the QPassport form) or printed (click on the *Print* button at the top of the QPassport form) and given to the donor.

Results/Images Display

1. Click the *Results/Images* link located on the left navigation.
2. The results that display are those that match the date range selected in the slider bar. The slider date range will persist from one log in to the next until changed. If the user wants to view results greater than a 90-day range, then de-select the 'Include slider dates' checkbox.

Advanced Search for Results

1. Click the *Results/Images* link located on the left navigation.
2. Click on the A*dvanced Search* link.
3. Enter in your search criteria and click the *Search* button.
4. The results that match your criteria will display in the grid on the Results page.

Change Advanced Search Criteria After Using Advanced Search

1. Click on the *Advanced Search* link.
2. To add to the Advanced Search, add the search criteria and click on the *Search* button.

3. To clear the search criteria, click on the *Reset* button and then enter in the new advanced search criteria from the available advanced search fields and click on the *Search* button.
4. The results that match your entered search criteria shall display in the Result page grid.

Print Results Display

1. Click on the Results link on the left navigation.
2. Click the checkbox at the top of the column to select all or individually click on the rows that you want to print. Only rows with a checkbox on the page will print, so select the appropriate results on the page to display from the drop down located at the bottom of the page.
3. Click Print Selection.
4. Select from one of the options that will allow you to print selected records in a table or print the items available as part of the result record, such as the CCF images or the Lab Report.

Change Search Fields

1. Click on the *Results* link on the left navigation.
2. Click the *Preference* button below the four search fields.
3. Select the four fields you want to display in your default search fields.
4. Click and drag the four fields into the order you prefer.
5. Click the *Save* button to save your four field search preferences.

Change the Result Column Order

1. Click on the *Results* link on the left navigation.
2. Click the *Preference* button above the Results grid.
3. Select up to seven fields that you want to display in the Results grid.
4. Click and drag the seven fields into the order you prefer.
5. Click the *Save* button to save your Results grid preferences.

Enter Alcohol (For Random selections see Random section below)

1. Click on the *Results* link on the left navigation
2. Click on the *Enter Alcohol* tab
3. Scroll down to the Personal Information section and enter in the required fields for the alcohol screen order including Primary ID, First Name, Last Name, Primary Phone, Account and Reason for Test
4. Enter in the Collector Name (Phone is optional), Test Date, Specimen ID Number, Screen Test Time (24 hour/Military Time), Test ID, Alcohol Level and if the level is equal to or above the organization Confirmation Level, enter in Test Time, Test ID and Confirmation Level.
5. Click *Submit.*

Enter Instant Results (For Random selections see Random section below)

1. Click on the Results link on the left navigation.
2. Select the Instant tab.
3. Enter in the donor's personal information which includes the following required information; Primary ID (this can be a social security number, employee ID, driver license number, etc.), First Name, Last Name and Primary Phone. The optional information (not required) includes Middle Name, Secondary Phone, Date of Birth and Gender.
4. To enter in an account number either start typing the account name or number in the account entry field and select from the list or select the checkbox next to the account in the window
5. Select the Reason for Test from the drop down
6. Click the Express Results instant device used in the drug test to be performed
7. Enter in the Lot Number, Expiration Date, Test Date, Test Time, Collector Name (Phone is optional), and results
8. If Presumptive Positive, select which analyte(s) to appear presumptive positive and enter in the Specimen ID number (from a paper requisition) that will accompany the specimen to the lab.
9. Click Submit.

REPORTS

Run a Management Report

1. Click on the *Report* link located on the left navigation menu.
2. Either click on the report from the reports drop down or the *Create Report* list.
3. Select the account(s) and other report criteria and select *Create Report* to display the report.
4. There are 7 standard reports that can be filtered and customized:

   - Client Activity Report
   - Donor Report
   - Positivity Report
   - Specimen Report
   - Summary Report
   - Turn Around Time Report
   - YTD Specimen Report

RANDOMS

View Random Pools

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. The Pool Summary page will show columns for Random Pool Name, Last Date Run, DOT and Next Selection By.
3. Select the plus (+) sign to show the details for a specific random pool.

Add a New Random Pool

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. Select the *Add Pool* button.
3. Complete all required fields that are indicated by a red asterisk (*) which include:
• Pool Name
• DOT Regulated
• Selection Interval – select a frequency of time from the drop down
• Selection Rate (Percentage or fixed number for a period of time). If it is a DOT-regulated pool, only an annual percentage with the federal requirements will display.
• Program Start Date
• Program End Date
• Number of Drug Tests Completed
• Number of Alcohol Tests Completed
• Number of Periods Run
• Account(s) (choose an account associated with the random pool)
• Order Codes (only one code per pool)
4. Choose *Save* to retain the pool.

Edit a Random Pool

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. Select the Plus (+) sign to display the pool details.
3. Select the *Edit Pool* button. All pool criteria can be edited.
4. If the pool isn't eligible for edits, the Edit button will not appear. You can only edit the criteria if a pool has never been run.

Delete a Random Pool

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. Select the Plus (+) sign to display the pool details.
3. Select the *Delete* button to remove the pool.
4. If the pool isn't eligible to delete, the Delete button will not appear. You can only delete a pool if it has never been run.

View and Add Members of a Random Pool

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. Select the Plus (+) sign to display the pool details.
3. Select the *Member List* button. A member list will display the following fields:

• Primary ID
• First Name
• Last Name
• Date Added
• Date Removed

4. To add a member, select the *Add Member* button and enter the five required fields (see step 3)
5. Choose *Save* to retain the added member(s).

Import Members to Random Pool

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. Select the Plus (+) sign to display the pool details.
3. Select the *Member List* button then select the Import Members button.
4. The screen will display as Import Members – Step 1 or 2. The page includes instructions about the required columns in an import a file or you can download an ESP template for your import.

• The import process will update ALL members for the Pool.
• If there are any existing members in the Pool that can be matched on Primary ID, the process will update the First and/or Last Name.
• Any existing members in the Pool that are not on the import file will be marked Removed from pool.

5. Once you select a file for import, choose *Next*.
6. View sample data from your import file and confirm it is mapped correctly. The Sample of Your Data field should match the Map Your Data to field. Select a field from the drop down if you need to change the mapping field.
7. If the data is correct, select the *Import* button.
8. A confirmation message will alert you to the number of members added, updated and removed. Once imported, the members are displayed in the Member List.

Edit a Specific Member in a Random Pool

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. Select the Plus (+) sign to display the pool details.
3. Select the *Member List* button to display existing pool member list.
4. To edit/update a member, select the Primary ID hyperlink.
5. Use the Primary ID hyperlink to open the member in Edit mode. You can edit First and Last Name, but Primary ID cannot be changed.

Delete Specific Member in a Random Pool

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. Select the Plus (+) sign to display the pool details.
3. Select the *Member List* button to display existing pool member list.
4. To remove a member, select the minus (-) sign next to a member on the Member List.
5. A message box will prompt you to confirm that you want to delete this specific member.
6. Once deleted, a current date will be displayed in the Date Removed column of the Member List for that member. Members that are removed are never permanently deleted from the database or Member List.
7. Select the plus (+) sign next to the member to add them back into the pool.

Run a Random Pool

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. Select the Plus (+) sign to display the pool details.
3. Select the checkbox indicating that you have reviewed the Member List for the Pool and are ready to run the selection.
4. Once the checkbox is selected, the *Run Selection* button will display.

5. When the Run Selection button is clicked, a message box will ask “Do you want to oversample for this selection interval?” Oversample means “extra selections” can be added to the pool.

• If yes, enter the number of extra selections for drug and alcohol tests in each field. If the oversample number will not exceed the number of members in the pool, the *Actual to be Selected* column will be recalculated with a new total.

6. Choose the Save and Run Selection button to run the selection.

7. A banner message will display saying that orders are being generated for the selection.

8. The Pool Summary grid and the Pool are updated with a Last Date Run.

Excuse a Specific Member in a Random Pool

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. Select the *Selection History* button.
3. On the Selection History page, click the *View hyperlink* for the most recent selection interval and select the *Excuse Drug* or *Excuse Alcohol* checkbox next to the selected hyperlink of the member.
4. When you excuse the selection, you will be asked if you would like to select an alternate member to replace the current selection with another member. If so, please click *Yes.*
5. Enter a reason in the Notes box and click *Save*.
6. The status of the member will change from Selected to Excused.

Excusing a member will affect the algorithm to determine percentage completed for entire random Program Period and next selection will be adjusted.

Close or Renew a Program

1. Click *Randoms* located on the left navigation to display the Pool Summary page.
2. Select the Plus (+) sign to display the pool details.
3. Select the *Close Program* button in the expanded pool once all requirements have been met and all intervals have been run. An error message will occur if you are not allowed to close the pool.
4. Select either *Yes* or *Yes and Renew* when you are asked to confirm that you would like to close the Pool.

• If Yes, a banner message will be displayed confirming closed in the Pool Summary Grid.

• If Yes and Renew, the Pool will be renewed, and you will go to the Pool Information page where changes can be made. The program start and end dates will be automatically adjusted to renew the pool for the next calendar year.

5. History is visible in the Group History Report for the closed and/or renewed pool.

Only Completed tests are counted toward fulfilling program requirements. (Excused tests, rejected specimens, refusals, cancelled tests will not count toward program requirements being fulfilled.)

Program and Group History Reports

Program and Group History reports are available for each pool with at least one selection interval run.

1. Click *Randoms* located on the left navigation to display the Pool History page.
2. Select the Plus (+) sign to display the pool details.
3. Select the *Program History* button in the expanded pool to access the report.
4. The report will display the pool definition characteristics, a year-to-date snapshot of the pool program, and a summary of each interval run in the program.

OR

5. Select the *Group History* button and enter a start and end date.
6. The report will display pool definition characteristics, each member from the list, date of selections run, and the status of each member for each interval.