Marshfield Labs™
A division of Marshfield Clinic

Reference Services Web Portal

User Guide

What is the Reference Services Web Portal?

The Reference Services Web Portal is a way for all of the Marshfield Labs' Reference clients to access and maintain their client information remotely and securely through a web browser. The Reference Services Web Portal allows clients to order tests; view test results; order supplies; maintain user security; request and monitor courier service; view trending reports, volume reports, and billing information; as well as pay any outstanding balances with a credit card.

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Getting Started

Opening the Reference Services Web Portal

1. Open your Internet Browser.
2. Type in the following address: **https://www.marshfieldclinic.org/reference/**

First-Time Log In

1. Click **Client Log In**.
2. In the **User Name** text box, type in your user name.
3. Press the **Tab** key.

   OR

   Click on the **Password** text box.
4. Type in your password.
5. After your user name and password have been entered, click **Log In**.
6. A screen will prompt you to create a new password.
7. Click on the **New Password** text box and type in a new password.

   NOTE: ***The new password must be at least 6 characters long, contain at least 2 numbers, contain no spaces, and cannot match your current user name or a recent password.***

8. Press the **Tab** key.

   OR

   Click on the **Confirm New Password** text box.
9. Retype your new password.
10. Click **Submit**.

Log In

To view any client-specific information, Client Log In is required.

1. In the **User Name** text box, type in your user name.
2. Press the **Tab** key.

   OR

Click on the **Password** text box.

3. Type in your password.

NOTE: ***The*** **Password** ***is sensitive to capital and lowercase letters. For example, if your password is "*** **Password00*****" then*** **PASSWORD00, password00,** ***or*** **pASSWORD00** ***will <u>not</u> be accepted.If you have forgotten your*** **User Name** ***or*** **Password,** ***call 1-866-522-2611.***

4. After your user name and password have been entered, click **Log In**.

Log Out

1. Click **Log Out**.

Patient Demographics

Patient Admin

The Patient Admin menu allows users to quickly add patients or update patient demographics without ordering tests.

1. From the **Patient Demographics** menu, select **Patient Admin**.
2. In the **Patient ID** text box, type in the new patient ID.
3. Click **Search**.
4. Under the Patient Information tab, click on or tab to each field to fill in the patient's information**.**

NOTE: ***The 'State' field will default to the state in which the account resides.***

5. If the patient has a Guarantor, click on the **Guarantor Information** link.
   a. The guarantor information entered will be order specific. So, once the information is entered and the order is submitted, the next order placed on that same patient will need to have the guarantor information reentered. The guarantor information will display on the review tab along with the confirmation page for that specific order as well. **NOTE:** If the first order for a specific patient is placed with guarantor information and then a second order is placed with different guarantor information on that same patient, both orders will reflect the latest guarantor information that was added to the system.

6. Click on the Primary Insurance Tab. Select the patient's **Primary Insurance** carrier from the drop-down list.

NOTE: ***If the patient's insurance carrier is not included in the list select,*** **Other** ***and fill in all fields. If the patient does not have a Primary Insurance carrier, select*** **None.**

NOTE: ***If a patient has both Medicare and Medicaid coverage, under the primary insurance tab, select Medicare and in the Group # field, place the Medicaid Number.***

7. Click on (or Tab to) each text box and fill in the primary insurance information.

8. If applicable, select the patient's **Secondary Insurance** carrier from the drop-down list.

> **NOTE:** ***If the patient's insurance carrier is not included in the list select,*** **Other** ***and fill in all fields. If the patient does not have a Secondary Insurance carrier, select*** **None.**

9. Click **Submit** on the **Patient Information tab** to continue creating the patient.

Update a Patient's Demographics

1. From the **Patient Demographic** menu, select **Patient Admin**.

2. In the **Patient ID** text box, type in the patient ID.

   OR

   If the patient ID is unknown, follow steps 2.1-2.3.

   Search Instructions:

   2.1 Input known information into the text boxes.

   > **NOTE:** ***When performing a search by demographic information, either a partial*** **Last Name** ***or an entire*** **Telephone Number** ***must be provided in order to begin the search.***

   2.2 Click **Search** to perform the patient search.

   2.3 The search will display a list of patients that meet the given criteria. Click on the hyperlinked **Patient ID** to select the appropriate patient from the list and continue with the order entry process or go to the **Patient Admin** menu to create a new patient.

3. Edit the patient information as necessary by clicking in the text boxes and retyping information and/or using the drop-down lists.

4. Click **Submit** to update the patient's demographics.

Patient Merge

The Patient Merge menu allows users to combine two patient records that actually belong to the same person. All historical and pending tests for the incorrect patient will now appear under the correct patient.

1. From the **Patient Demographics** menu, select **Patient Merge**.

2. Type in the incorrect patient ID.

3. Type in the correct patient ID.
4. Click **Next**.
5. Verify both the **Incorrect Patient** and **Correct Patient** information.
6. Click **Submit** to merge the two patients.

   OR

   Click **Back** to go back to Step 1 of Patient Merge.

   NOTE: ***The merge process is permanent and cannot be undone after* Submit *is clicked.***

7. A message will be sent once the merge process has been completed.

Request Service

Order Clinical Tests

1. From the **Request Service** menu, select **Order Tests**

   OR

   Select **Order Tests** from the top navigational tool bar.

2. Type the **Patient ID** into the text box given and click **Search**

   OR

   If the **Patient ID** is unknown, follow steps 2.1-2.3

   Search Instructions:

   2.1 Input known information into the text boxes.

   NOTE: ***When performing a search by demographic information, either a partial* Last Name *or entire* Telephone Number *must be provided in order to begin the search.***

   2.2 Click **Search** to perform the patient search.

   a. The search will display a list of patients that meet the given criteria. Click on the hyperlinked **Patient ID** to select the appropriate patient from the list and continue with the order entry process or click on **New** to create a new patient.

3. Enter or verify the correct information.
4. Click on the **Primary and/or Secondary Insurance Tabs**.
5. Enter or verify the correct information.

NOTE: ***For information on entering patient and insurance information, see steps 4-8 of the*** *Error! Reference source not found.* ***section on p.*** *Error! Bookmark not defined.***.**

6. Click on the **Order Details tab**. Select a provider from the drop-down list.

NOTE: If there is only one provider in the Requesting Provider list, that name will be selected automatically in the drop-down list.

7. If necessary, modify the **Collection Date** and **Collection Time**.

NOTE: The Collection Time is displayed in military time.

8. Select a **Priority** from the drop-down list.
9. If your Client is NOT configured to receive all results automatically via fax, select the Fax and/or Call option and input the appropriate number to receive the results for this particular order.

NOTE: ***Selecting the* Call *or* Fax *option only makes changes for this order. It does not affect future orders. Also, if you are already set up to receive faxed or called results, the* Fax *and* Call *boxes do not need to be checked.***

10. At least one **Diagnosis Code** must be assigned per test if the patient has insurance.
11. If the diagnosis codes are unknown, click on the hyperlinked **Advanced Search** to search for a code(s) on a particular diagnosis. Enter a description and click **Search**. Check the box in front of the appropriate code from the search list.

    OR

    Click **Cancel** to close the search box.

NOTE: ***Clicking on the* ICD-9 Ref Sheet *text will bring up a 31 page reference sheet in PDF format.***

12. Check the **ABN** box if the Advance Beneficiary Notice form has been signed.
13. Click on the **Test Selection** tab to select the appropriate tests to order for the patient.
14. Select the **My List** tab to order a test from the top 20 most commonly ordered tests.

NOTE: ***The tests listed in the My List tab can be defined by the user through Test Code Adminsation found under the Settings menu.***

OR

Select the **Alpha** tabs to find a test by description.

OR

Select the **Misc.** tab to order a miscellaneous test if the test code is not found in the lists.

OR

Click in the **Keywords** search box to search for a test by inputting a test code, synonym or a description. Click **Search**. Click on the appropriate test.

NOTE: ***Some tests require a field to be completed when selected (e.g., the Urinalysis Complete test). The appropriate information must be typed into this field before the program will proceed with the order.***

NOTE: ***To view test details, click on the book icon next to the Test Code.***

15. Once all the tests have been selected and are appearing in the **Ordered Tests** box, the diagnosis codes for the tests can be edited or the test can be removed.

    NOTE: ***To view test details, click on the book icon next to the Test Code.***

16. To **Edit Diagnosis Codes,** click **Edit** after the test name. The Test Selection Data box will appear. Edit any of the information. Click **Update**.

    OR

    To **Add a Diagnosis Code**, click **Edit** after the test name. In an empty code box and add the code number and click **Update**.

    OR

    To **Remove a Test**, click on the **Remove** link after the test name in the Ordered Tests box.

17. Type in the **Label ID** (6 digits followed by the letter H)

    OR

    Type in the **Order ID** (if left blank, the Order ID will auto-fill when the order is placed).

18. Type any necessary comments into the **Additional Comments** text box.

19. Check the **Confirmation Page** check box to display a copy of the confirmation page after submitting the order

    OR

20. Uncheck the **Confirmation Page** check box to NOT display a copy of the confirmation page after submitting the order.

21. Click the **Review** tab to review entire order, prior to placing the order.

22. Click **Order** to submit the order.

23. An **Order Confirmation** page will display giving information about the order just submitted, if the check box was checked.

24. Print this page for personal records by clicking on **File** and selecting **Print**.

Order Cytology Tests

1. From the **Request Service** menu, select **Order Tests**

   OR

   Select **Order Tests** from the top navigational tool bar.

2. Type the **Patient ID** into the text box given and click **Search**

   OR

   If the **Patient ID** is unknown, follow steps 2.1-2.3

   Search Instructions:

   2.1 Input known information into the text boxes.

   NOTE: ***When performing a search by demographic information, either a partial* Last Name *or entire* Telephone Number *must be provided in order to begin the search.***

   3.3 Click **Search** to perform the patient search.

   a. The search will display a list of patients that meet the given criteria. Click on the hyperlinked **Patient ID** to select the appropriate patient from the list and continue with the order entry process or click on **New** to create a new patient.

3. Enter or verify the correct information.

4. Click on the **Primary and/or Secondary Insurance Tabs**.

5. Enter or verify the correct information.

   NOTE: ***For information on entering patient and insurance information, see steps 4-8 of the*** *Error! Reference source not found.* ***section on p.*** *Error! Bookmark not defined.***.**

6. Click on the **Order Details tab**. Select a provider from the drop-down list.

   NOTE: If there is only one provider in the Requesting Provider list, that name will be selected automatically in the drop-down list.

7. If necessary, modify the **Collection Date** and **Collection Time**.

   NOTE: The Collection Time is displayed in military time.

8. Select a **Priority** from the drop-down list.

9. If your Client is NOT configured to receive all results automatically via fax, select the Fax and/or Call option and input the appropriate number to receive the results for this particular order.

   NOTE: ***Selecting the* Call *or* Fax *option only makes changes for this order. It does not affect future orders. Also, if you are already set up to receive faxed or called results, the* Fax *and* Call *boxes do not need to be checked.***

10. At least one **Diagnosis Code** must be assigned per test if the patient has insurance.

11. If the diagnosis codes are unknown, click on the hyperlinked **Advanced Search** to search for a code(s) on a particular diagnosis. Enter a description and click **Search**. Check the box in front of the appropriate code from the search list.

    OR

    Click **Cancel** to close the search box.

NOTE: ***Clicking on the*** **ICD-9 Ref Sheet** ***text will bring up a 31 page reference sheet in PDF format.***

12. Check the **ABN** box if the Advance Beneficiary Notice form has been signed.

13. Click on the **Test Selection** tab to select the appropriate tests to order for the patient.

14. Click the cytology test from the **Cytology/Histology** tab.

15. Click on any of the Cytology – Gyn or Cytology – NonGyn tests or order.

NOTE: ***The Cytology tests require fields to be completed when selected. The appropriate information must be typed into this field before the program will proceed with the order.***

16. Click **Edit** after the test name. The Test Selection Data box will appear. Edit any of the information. Click **Update**.

    OR

    To **Remove a Test**, click on the **Remove** link after the test name in the Ordered Tests box.

17. Type in the **Label ID** (6 digits followed by the letter H)

    OR

    Type in the **Order ID** (if left blank, the Order ID will auto-fill when the order is placed).

18. Type any necessary comments into the **Additional Comments** text box.

19. Check the **Confirmation Page** check box to display a copy of the confirmation page after submitting the order

    OR

20. Uncheck the **Confirmation Page** check box to NOT display a copy of the confirmation page after submitting the order.

21. Click the **Review** tab to review entire order, prior to placing the order.

22. Click **Order** to submit the order.

23. An **Order Confirmation** page will display giving information about the order just submitted, if the check box was checked.

24. Print this page for personal records by clicking on **File** and selecting **Print**.

Order Histology Tests

1. From the **Request Service** menu, select **Order Tests**

   OR

   Select **Order Tests** from the top navigational tool bar.

2. Type the **Patient ID** into the text box given and click **Search**

   OR

   If the **Patient ID** is unknown, follow steps 2.1-2.3

   Search Instructions:

   2.1 Input known information into the text boxes.

   NOTE: ***When performing a search by demographic information, either a partial*** **Last Name** ***or entire*** **Telephone Number** ***must be provided in order to begin the search.***

   4.4 Click **Search** to perform the patient search.

   b. The search will display a list of patients that meet the given criteria. Click on the hyperlinked **Patient ID** to select the appropriate patient from the list and continue with the order entry process or click on **New** to create a new patient.

3. Enter or verify the correct information.

4. Click on the **Primary and/or Secondary Insurance Tabs**.

5. Enter or verify the correct information.

   NOTE: ***For information on entering patient and insurance information, see steps 4-8 of the*** *Error! Reference source not found.* ***section on p.*** *Error! Bookmark not defined.***.**

6. Click on the **Order Details tab**. Select a provider from the drop-down list.

   NOTE: If there is only one provider in the Requesting Provider list, that name will be selected automatically in the drop-down list.

7. If necessary, modify the **Collection Date** and **Collection Time**.

   NOTE: The Collection Time is displayed in military time.

8. Select a **Priority** from the drop-down list.

9. If your Client is NOT configured to receive all results automatically via fax, select the Fax and/or Call option and input the appropriate number to receive the results for this particular order.

   NOTE: ***Selecting the* Call *or* Fax *option only makes changes for this order. It does not affect future orders. Also, if you are already set up to receive faxed or called results, the* Fax *and* Call *boxes do not need to be checked.***

10. At least one **Diagnosis Code** must be assigned per test if the patient has insurance.

11. If the diagnosis codes are unknown, click on the hyperlinked **Advanced Search** to search for a code(s) on a particular diagnosis. Enter a description and click **Search**. Check the box in front of the appropriate code from the search list.

    OR

    Click **Cancel** to close the search box.

    NOTE: ***Clicking on the* ICD-9 Ref Sheet *text will bring up a 31 page reference sheet in PDF format.***

12. Check the **ABN** box if the Advance Beneficiary Notice form has been signed.

13. Click on the **Test Selection** tab to select the appropriate tests to order for the patient.

14. Click the **Histology** test under the Histology section of the **Cytology/Histology** tab.

    NOTE: ***The Cytology tests require fields to be completed when selected. The appropriate information must be typed into this field before the program will proceed with the order.***

15. Click **Edit** after the test name. The Test Selection Data box will appear. Edit any of the information. Click **Update**.

    OR

    To **Remove a Test**, click on the **Remove** link after the test name in the Ordered Tests box.

16. Type in the **Label ID** (6 digits followed by the letter H)

    OR

    Type in the **Order ID** (if left blank, the Order ID will auto-fill when the order is placed).

17. Type any necessary comments into the **Additional Comments** text box.

18. Check the **Confirmation Page** check box to display a copy of the confirmation page after submitting the order

    OR

19. Uncheck the **Confirmation Page** check box to NOT display a copy of the confirmation page after submitting the order.

20. Click the **Review** tab to review entire order, prior to placing the order.

21. Click **Order** to submit the order.

22. An **Order Confirmation** page will display giving information about the order just submitted, if the check box was checked.

23. Print this page for personal records by clicking on **File** and selecting **Print**.

Change Existing Lab Order

Clicking on the Change Existing Lab Order link retrieves all pending orders (e.g. orders with a status of *Ordered, In Transit*) by patient ID or date range.

NOTE: ***Change Order does not modify patient information, collection data, or original order comments.***

Search by Patient

1. From the **Request Service** menu, select **Change Existing Lab Order**.

2. Type in the Patient ID and click **Submit**.

   OR

   If the Patient ID is unknown, follow steps 1.1-1.3.

   Search Instructions

   1.1 Input known information into the text boxes.

   NOTE: ***When performing a search by demographic information, either a partial*** **Last Name** ***or an entire*** **Telephone Number** ***must be provided in order to begin the search.***

   1.2 Click **Search** to perform the patient search.

   1.3 The search will display a list of patients that meet the given criteria. Click on the hyperlinked **Patient ID** to select the appropriate patient from the list and continue with the change order process or click on **New** to create a new patient.

3. Click on the **Label** icon to reprint labels.

4. Click on the **Pencil** icon next to the accession (order) to change.

   NOTE: ***Since only orders with a status of*** ***Ordered, In Transit*** ***can be modified in change order, the*** **Pencil** ***icon will not appear next to orders with any other status.***

5. **Order Details Tab**: the Diagnosis Codes and ABN signed are the only two features that can be modified under this tab.

6. **Test Selection Tab**: Add, Remove or Modify tests as appropriate.

7. Click **Edit** after the test name. The Test Selection Data box will appear. Edit any of the information. Click **Update**.

   OR

   To **Remove a Test**, click on the **Remove** link after the test name in the Ordered Tests box.

8. **Additional Comments** can be added.

9. A comment in the **Modification Reason** text box is required to proceed with the order change.

10. Click **Update** to submit the order

    OR

    Click **Cancel Order** to cancel entire order.

11. A confirmation page will display giving the accession number and other pertinent information regarding the changes just submitted.

12. Print this page for personal records by clicking on the **File** menu and selecting **Print.**

Search by Collection Date

1. From the **Request Service** menu, select **Change Existing Lab Order**.
2. Select a **Start Date** and an **End Date**.
3. Click **Search**.
4. Click on the **Pencil** icon next to the accession (order) to change.

> **NOTE:** ***Since only orders with a status of Ordered, In Transit can be modified in change order, the Pencil icon will not appear next to orders with any other status.***

5. **Order Details Tab**: the Diagnosis Codes and ABN signed are the only two features that can be modified under this tab.

6. **Test Selection Tab**: Add, Remove or Modify tests as appropriate.

7. Click **Edit** after the test name. The Test Selection Data box will appear. Edit any of the information. Click **Update**.

   OR

   To **Remove a Test**, click on the **Remove** link after the test name in the Ordered Tests box.

8. **Additional Comments** can be added.

9. A comment in the **Modification Reason** text box is required to proceed with the order change.

10. Click **Update** to submit the order

    OR

    Click **Cancel Order** to cancel entire order.

11. A confirmation page will display giving the accession number and other pertinent information regarding the changes just submitted.

12. Print this page for personal records by clicking on the **File** menu and selecting **Print**.

Request Courier Pickup

Request Courier Pickup allows the user to request a courier stop. This feature only applies if you use Marshfield Clinic's courier services.

1. From the **Request Service** menu, select **Request Courier Pickup**.

2. Click on the **Stop Date** drop-down list to select a date for the courier to stop.

    NOTE: ***If the client account has multiple courier routes each day (i.e. a morning route and an afternoon route), selecting a stop date will request a stop for the first available route.***

3. Click **Next.**

4. A page will appear giving the earliest date the courier can stop.

    NOTE: ***If the* Call-By Time *has passed, the user will receive a notification in red, bold print.***

5. Click on the drop-down list to see all of the options for the date listed.

6. If the **Pickup Day** listed is acceptable, enter any necessary **Comments** then click **Confirm**.

    OR

    If the **Stop Date** listed is unacceptable, click on **Cancel** and contact Lab Customer Service (1-866-522-2611) for options on earlier courier stops.

7. A message will appear signifying that the stop request was successful.

Order Lab Supplies

Use the Order Lab Supplies page to request supplies to be sent or routed to you. All supplies ordered here will be directly billed to your client account.

1. From the **Request Service** menu, select **Order Lab Supplies**.

2. Locate the appropriate supply item from the supplies tabs.

3. Click on the appropriate supply item in the list.

NOTE: ***Click on the book icon to name to view the minimum quantity to order and a more detailed description and picture of each item.***

4. Type a number into the **Quantity** field to order a specified quantity of that supply item.

5. Click **Add**.

6. To Edit a Supply, click **Edit** after the supply name. The Supply Data box will appear. Edit any of the quantities. Click **Update**.

   OR

   To **Remove a Supply**, click on the **Remove** link after the supply name in the Ordered Tests box.

7. Additional comments can also be made in the **Additional Comments** text box.

8. If the order is placed, an **Order Complete** message will appear above the order. Click the *Print* icon to print the order.

Packing List

Print Pending Orders

The Print Pending Orders is a list of items that have not yet been printed on a Packing List.

1. From the **Packing List** menu, select **Print Packing Orders**.

   NOTE: ***Make sure all modifications to orders are made prior to printing.***

2. Click Print, located on the right side of the top navigational toolbar to create the printable version of the packing list.

3. Another window will appear displaying the printable version of the packing list. From the **File** menu, select **Print**.

4. The packing list will subdivide into 3 separate packing lists (if applicable): **Clinical, Cytology**, and **Histology**. Each packing list needs to be included with its respective samples.

Print Merged List

The Print Merged List is a list of order that have been previously printed and any non-printed orders that are outstanding.

1. From the **Packing List** menu, select **Print Merged List**.

2. Click Reprint to create one merged Packing list containing all orders that have been

entered since the last shipment. This packing list will contain orders from previously printed lists and any non-printed orders that are outstanding.

3. Another window will appear displaying the printable version of the packing list. From the **File** menu, select **Print**.

4. The packing list will subdivide into 3 separate packing lists (if applicable): **Clinical, Cytology**, and **Histology**. Each packing list needs to be included with its respective samples.

Recent Print History

The Recent Print History list all the Packing Lists that have been printed within the past 7 days.

1. From the **Packing List** menu, select **Recent Print History**.

   Click on a link within the Printed Packing List box to view the document in a PDF format.

2. Another window will appear displaying the printable version of the packing list. From the **File** menu, select **Print**.

3. The packing list will subdivide into 3 separate packing lists (if applicable): **Clinical, Cytology**, and **Histology**. Each packing list needs to be included with its respective samples.

Offline Packing List

The Offline Packing List is a feature designed to proactively assist you during times of Internet or website downs when your online Packing List is unavailable to you.

It's highly recommended to print and store a blank copy of each Offline Packing List for emergency purposes. When your online Packing List is unavailable, simply fill in the Offline Packing List and submit it with your samples to your courier.

Test Results

View Results

The user can view the results of tests by Patient ID, or Collection Date of the tests.

Search by Unviewed Results

1. Click on **Results** from the top navigational tool bar.

2. Click on an Accession/Case ID number.

   NOTE: ***Red font indicates that there is an abnormal results.***

Search by Patient

1. From the **Test Results** menu, select **View Results**.

2. Type in the Patient ID and click **Submit**.

   OR

   If the Patient ID is unknown, follow steps 1.1-1.3.

Search Instructions

1.4 Input known information into the text boxes.

NOTE: ***When performing a search by demographic information, either a partial* Last Name *or an entire* Telephone Number *must be provided in order to begin the search.***

1.5 Click **Search** to perform the patient search.

1.6 The search will display a list of patients that meet the given criteria. Click on the hyperlinked **Patient ID** to select the appropriate patient from the list and continue with the change order process or click on **New** to create a new patient.

3. Click on a hyperlinked test accession to view the Results.

NOTE: ***Result details can only be viewed if the test status is* Final Result Available.**

4. The results page will appear with the options to open attachments (if applicable), print or fax results, and choose to add-on test(s).

To View Attachment:

- Click on the **Attachment** button.
- Select an image to view.

To Fax Results:

- Check the F**ax** check box on the left navigation tool bar.
- Fill in the appropriate information.
- Click **Submit**.

To Print Results:

- Click **Print** in the top navigational tool bar.
- Another window will appear.
- Select **File** and click **Print**.

To Add On Test:

- Click on **Add On** in the top navigational tool bar.

- The **Add On Test** window will appear.
- **Order Details Tab**: the Diagnosis Codes and ABN signed are the only two features that can be modified under this tab.
- **Test Selection Tab**: Add test(s).
- To **Edit a Test**, click **Edit** after the test name. The Test Selection Data box will appear. Edit any of the information. Click **Update**.
- **OR**
- To **Remove a Test**, click on the **Remove** link after the test name in the Ordered Tests box.
- **Additional Comments** can be added.
- Click **Add-On** to submit the order

Search by Identifier

1. From the **Test Results** menu, select **View Results**.
2. Type in the **Accession Number**, **Client Order Number** or **Case ID**.
3. Click **Submit**.
4. Click on a hyperlinked test accession to view the Results.

NOTE: ***Result details can only be viewed if the test status is*** **Final Result Available.**

5. The results page will appear with the options to open attachments (if applicable), print or fax results, and choose to add-on test(s).

To View Attachment:

- Click on the **Attachment** button.
- Select an image to view.

To Fax Results:

- Check the F**ax** check box on the left navigation tool bar.
- Fill in the appropriate information.
- Click **Submit**.

To Print Results:

- Click **Print** in the top navigational tool bar.
- Another window will appear.
- Select **File** and click **Print**.

To Add On Test:

- Click on **Add On** in the top navigational tool bar.
- The **Add On Test** window will appear.
- **Order Details Tab**: the Diagnosis Codes and ABN signed are the only two features that can be modified under this tab.
- **Test Selection Tab**: Add test(s).
- To **Edit a Test**, click **Edit** after the test name. The Test Selection Data box will appear. Edit any of the information. Click **Update**.

  OR

  To **Remove a Test**, click on the **Remove** link after the test name in the Ordered Tests box.
- **Additional Comments** can be added.
- Click **Add-On** to submit the order

Search by Collection Date

1. From the **Test Results** menu, select **View Results**.
2. Select a **Start Date** and an **End Date**.
3. Select **Status**.
4. Click **Search**.
5. Click on a hyperlinked test accession to view the Results.

NOTE: ***Result details can only be viewed if the test status is*** **Final Result Available.**

6. The results page will appear with the options to open attachments (if applicable), print or fax results, and choose to add-on test(s).

   To View Attachment:

   - Click on the **Attachment** button.
   - Select an image to view.

   To Fax Results:

   - Check the F**ax** check box on the left navigation tool bar.
   - Fill in the appropriate information.
   - Click **Submit**.

   To Print Results:

- Click **Print** in the top navigational tool bar.
- Another window will appear.
- Select **File** and click **Print**.

To Add On Test:

- Click on **Add On** in the top navigational tool bar.
- The **Add On Test** window will appear.
- **Order Details Tab**: the Diagnosis Codes and ABN signed are the only two features that can be modified under this tab.
- **Test Selection Tab**: Add test(s).
- To **Edit a Test**, click **Edit** after the test name. The Test Selection Data box will appear. Edit any of the information. Click **Update**.

  OR

  To **Remove a Test**, click on the **Remove** link after the test name in the Ordered Tests box.
- **Additional Comments** can be added.
- Click **Add-On** to submit the order

Download Lab Results

1. From the **Test Results** menu, select **Download Lab Results**.
2. Read the special condition for use of this feature and click on the **I Agree** check box and **Next** to proceed.

Search by Collection Date

1. Select a **Result Type** from the drop-down list.
2. Select a **Format Type** from the drop-down list, to select a format for the result detail information to be downloaded in.
3. Select a **Start Date** and an **End Date**.
4. Click **Search** to continue with the downloading process.
5. From the 'Download file' prompt, click **Save** and select the directory in which you would like to save the file OR click **Open** to view the results in a new popup window.

Search by Status

1. Select a **Result Type** from the drop-down list.

2. Select a **Format Type** from the drop-down list, to select a format for the result detail information to be downloaded in.

3. **Status** should remain “Not Previously Downloaded.”

4. Click **Search** to continue with the downloading process.

5. From the ‘Download file’ prompt, click **Save** and select the directory in which you would like to save the file OR click **Open** to view the results in a new popup window.

Batch Print Lab Results

This option allows up to 20 results to be printed at a time. The portal will provide unprinted results for the past eight weeks.

1. From the **Test Results** menu, select **Batch Print Lab Results**.

Search by Collection Date

1. Select a **Result Type** from the drop-down list.

2. Select a **Start Date** and an **End Date**.

3. Click **Search.**

Search by Status

1. Select a **Result Type** from the drop-down list.

2. **Status** should remain “Not Previously Printed.”

3. Click **Search**.

Billing

The Billing menu allows the user to view the billing summary and billing statements. Also the user can view their bills and pay them on-line.

Pay Monthly Bill

The Pay Monthly Bill page allows on-line credit card payments to be applied toward any outstanding balances for your account.

1. From the **Billing** menu, select **Pay Monthly Bill**.

2. Complete the fields with the credit card information as requested.

3. Click **Submit** to submit the credit card information for payment.

4. A confirmation page will appear giving the status of the transaction.

5. Print the confirmation page for your personal records by clicking on **Print** in the top navigational tool bar.

View Billing Summary

The View Billing Summary page shows a monthly summary of invoices, adjustments and balances.

1. From the **Billing** menu, select **View Billing Summary**.

2. The **Monthly Summary** can be printed, faxed, emailed or graphed.

   To Print the Monthly Summary:

   - Click **Print** in the top navigational tool bar.
   - Another window will appear.
   - Select **File** and click **Print**.

   To Fax the Monthly Summary:

   - Click on the **Distribution** button.
   - Check the F**ax** check box on the left navigation tool bar.
   - Fill in the appropriate information.
   - Click **Submit**.

   To Email the Monthly Summary:

   - Click on the **Distribution** button.
   - Check the Email check box on the left navigation tool bar.
   - Enter Email Address.
   - Click **Submit**.

   To Graph the Monthly Summary:

   - Click on the **Distribution** button.
   - Click on either **Bar Chart** or **Line Chart**.
   - A separate window will appear viewing the graph.
   - The graph can be printed by clicking **File** and selecting **Print**.

3. Click on the **book icon** to view details for a particular month's invoice.

4. The Billing Statement can be printed or faxed.

   To Print Billing Statement Details:

- Click **Print** in the top navigational tool bar.
- Another window will appear.
- Select **File** and click **Print**.

To Fax Billing Statement:

- Click on the **Distribution** button.
- Check the F**ax** check box on the left navigation tool bar.
- Fill in the appropriate information.
- Click **Submit**.

5. Click on the **PDF icon** to view the printable billing statement.

View Entire Fee Schedule

The View Fee Schedule page lists the individual test prices for a specific client. Since this information is for internal use only, expressed written consent of Marshfield Labs must be obtained to distribute this information externally.

1. From the **Billing** menu, select **View Entire Fee Schedule**.
2. Scroll through the list to find the desired test or if you are searching for a specific test code, type the test code with in the **Search** field.
3. Click the Move to Bottom, or Return to Top buttons to view lists that are longer than one page in length.
4. While viewing the Entire Fee Schedule, the following buttons can be clicked:

   Move to Bottom Moves to the bottom of the list (if the list is more than one web page long).

   Move to Top Moves to the top of the list (if the list is more than one web page long).

5. Click Print in the top navigational tool bar to print the entire fee schedule.
6. The Fee Schedule can also be faxed or emailed.

To Fax the Entire Fee Schedule:

- Click on the **Distribution** button.
- Check the F**ax** check box on the left navigation tool bar.
- Fill in the appropriate information.
- Click **Submit**.

To Email the Entire Fee Schedule:

- Click on the **Distribution** button.
- Check the Email check box on the left navigation tool bar.
- Enter Email Address.
- Click **Submit**.

Management Reports

View Courier Pickups

The View Courier Pickups page shows the status of courier requests.

1. From the **Management Reports** menu, select **View Courier Pickups**.
2. Select a **Start Date** and an **End Date**.
3. Click **Search** to retrieve the results.
4. Click **Print** from the top navigational bar to print a copy for your personal records.
5. Another window will appear. Select **File** and click **Print**.
6. While viewing the Courier Status list, the following buttons can be clicked:

   Move to Bottom Moves to the bottom of the list (if the list is more than one web page long).

   Move to Top Moves to the top of the list (if the list is more than one web page long).

7. The Courier Pickup Status List can also be faxed or emailed.

   To Fax the Courier Pickup Status List:

   - Click on the **Distribution** button.
   - Check the F**ax** check box on the left navigation tool bar.
   - Fill in the appropriate information.
   - Click **Submit**.

   To Email the Courier Pickup Status List:

   - Click on the **Distribution** button.
   - Check the Email check box on the left navigation tool bar.
   - Enter Email Address.
   - Click **Submit**.

View Ordered Supplies

1. From the **Management Reports** menu, select **View Ordered Supplies**.
2. Select a **Start Date** and an **End Date**.
3. Select a **Status** using the drop-down list.
4. Click **Search** to retrieve the results.
5. Click **Print** from the top navigational bar to print a copy for your personal records.
6. Another window will appear. Select **File** and click **Print.**
7. While viewing the Ordered Supplies list, the following buttons can be clicked:

Move to Bottom	Moves to the bottom of the list (if the list is more than one web page long).
Move to Top	Moves to the top of the list (if the list is more than one web page long).

8. The Ordered Supplies List can also be faxed, emailed or graphed.

To Fax the Ordered Supplies List:

- Click on the **Distribution** button.
- Check the F**ax** check box on the left navigation tool bar.
- Fill in the appropriate information.
- Click **Submit**.

To Email the Ordered Supplies List:

- Click on the **Distribution** button.
- Check the Email check box on the left navigation tool bar.
- Enter Email Address.
- Click **Submit**.

To Graph the Ordered Supplies List:

- Click on the **Distribution** button.
- Click on either **Bar Chart** or **Line Chart**.
- A separate window will appear viewing the graph.
- The graph can be printed by clicking **File** and selecting **Print**.

Test Volume Report

The Test Volume Report page creates a monthly report of client's test volume for a specified year.

1. From the **Management Reports** menu, select **Test Volume Report**.
2. Select the year to trend from the **Year** drop-down list.
3. Select the appropriate **Sort Order** for the report from the drop-down list.
4. Click **Next** to create a Test Volume Report.
5. Click **Print** from the top navigational bar to print a copy for your personal records.
6. Another window will appear. Select **File** and click **Print**.
7. While viewing the Test Volume Report, the following buttons can be clicked:

   Move to Bottom Moves to the bottom of the list (if the list is more than one web page long).

   Move to Top Moves to the top of the list (if the list is more than one web page long).

9. The Test Volume Report can also be faxed, emailed or graphed.

   To Fax the Test Volume Report:

   - Click on the **Distribution** button.
   - Check the F**ax** check box on the left navigation tool bar.
   - Fill in the appropriate information.
   - Click **Submit**.

   To Email the Test Volume Report:

   - Click on the **Distribution** button.
   - Check the Email check box on the left navigation tool bar.
   - Enter Email Address.
   - Click **Submit**.

   To Graph the Test Volume Report:

   - Click on the **Distribution** button.
   - Click on either **Bar Chart** or **Line Chart**.
   - A separate window will appear viewing the graph.
   - The graph can be printed by clicking **File** and selecting **Print**.

Test Comparison Report

The Test Comparison Report page allows a client to view a monthly volume comparison report of billed tests.

1. From the **Management Reports** menu, select **Test Comparison Report**.
2. Select the month to create the volume report for by selecting it from the **Month** drop-down list.
3. Select the appropriate order for the volume report from the **Sort Order** drop-down list.
4. Click **Next** to create the volume report.
5. Click **Print** from the top navigational bar to print a copy for your personal records.
6. Another window will appear. Select **File** and click **Print**.
7. While viewing the Test Comparison Report, the following buttons can be clicked:

   Move to Bottom Moves to the bottom of the list (if the list is more than one web page long).

   Move to Top Moves to the top of the list (if the list is more than one web page long).

8. The Test Comparison Report can also be faxed, emailed or graphed.

   To Fax the Test Comparison Report:

   - Click on the **Distribution** button.
   - Check the F**ax** check box on the left navigation tool bar.
   - Fill in the appropriate information.
   - Click **Submit**.

   To Email the Test Comparison Report:

   - Click on the **Distribution** button.
   - Check the Email check box on the left navigation tool bar.
   - Enter Email Address.
   - Click **Submit**.

   To Graph the Test Comparison Report:

   - Click on the **Distribution** button.
   - Click on either **Bar Chart** or **Line Chart**.
   - A separate window will appear viewing the graph.
   - The graph can be printed by clicking **File** and selecting **Print**.

View Lab Results Trending

Search by Patient

1. From the **Management Reports** menu, select **View Lab Results Trending**.
2. Select the test to trend from the **Select Test** drop-down list.
3. Type the **Patient ID** into the text box given.
4. Click **Submit**.

   OR

   If the Patient ID is unknown, click **Search** and follow steps 4.1 – 4.3

Search Instructions:

4.1 Input known information into the search criteria fields.

> **NOTE:** ***When performing a search by demographic information, either a partial* Last Name *or a* Telephone Number *must be provided to begin the search.***

4.2 Click on **Search** to perform the patient search.

4.3 The search will display a list of patients that meet the given search criteria. Click on the hyperlinked **Patient ID** to return to the previous screen (the will be ID filled in).

OR

Click on the hyperlinked **Advance Search**. Fill in all known information and click **Search.**

5. Choose the Samples you wish to graph. The **Select** or **Deselect All** buttons can be utilized as well.
6. Click **Submit**.
7. A graph with tabled results will display in a separate window. The graph can be printed by clicking the **File** menu and selecting **Print.**

Search by Collection Date

1. From the **Management Reports** menu, select **View Lab Results Trending**.
2. Select the test to trend from the **Select Test** drop-down list.
3. Select a **Start Date** and an **End Date** for the graph data.
4. Check the **Select Samples** check box.
5. Click **Search**.
6. Choose the Samples you wish to graph. The **Select** or **Deselect All** buttons can be utilized as well.
7. Click **Submit**.
8. A graph with tabled results will display in a separate window. To print the graph, click the **File** menu and select **Print**.

View Histology Charge Logs

1. From the **Management Reports** menu, select **View Histology Charge Logs**.
2. Select the **Start** and **End** date range.

   NOTE: ***The portal will only allow you to search by 30-day date ranges.***

3. Click **Search**.
4. Click on the **book icon** to view the Histology Change Log.
5. To print the report, click on **File** and select **Print**.

Miscellaneous Options

Change Password

1. From the **Miscellaneous Options** menu, select **Change Password**.
2. Click on the **Current Password** text box and type in your current password.
3. Press the **Tab** key.

   OR

   Click on the **New Password** text box.

4. Type your new password in the **New Password** text box.

   NOTE: ***Your New Password must be at least 7 characters long and include at least 2 numbers; it may not have spaces and cannot match your user name or a recently used password.***

5. Press the **Tab** key.

OR

Click on the **Confirm New Password** text box.

6. Retype your new password in the **Confirm New Password** text box.
7. Click **Submit** to have password changed.
8. A message will appear signifying the password has been successfully changed.

NOTE: ***The new password will need to be used at your next Log In.***

View Access Log

The Access Log gives a history of the activity on the user's account.

1. From the **Miscellaneous Options** menu, select **View Access Log**.
2. The Access Log will display.
3. To view other pages of the Access Log, click on a page number.
4. To print, click **Print** in the top navigational tool bar.

View Messages

The View Messages page allows current messages from Marshfield Labs, coworkers, or yourself to be viewed or removed.

1. From the **Miscellaneous Options** menu, select **View Messages**.

   OR

   Click on **Messages** on the top navigational tool bar.
2. View a message details by clicking on the hyperlinked **More**.
3. To remove the message, check the checkbox in front of the message and click Mark as Read.

Settings

Provider Administration

The Provider Admin page allows new providers to be created, as well as existing providers to be activated or inactivated. These changes will show up when ordering tests.

NOTE: ***Providers cannot be deleted.***

Create a New Provider

1. From the **Settings** menu, select **Provider Administration**.
2. Type the provider information into the respective text boxes.

> **NOTE:** ***Checking the* Active *box means the provider will be available on drop-down lists when ordering tests.***

3. Click **Submit** to create the new provider.
4. A message will appear signifying that the provider was successfully added.

Manage Current Providers

1. From the **Settings** menu, select **Provider Administration**.
2. If checked, the provider is active, therefore aviable for use when ordering tests.
3. To uncheck or check a provider, click in the check box inf front of the provider's name.

> **NOTE:** ***Select all providers in your list by clicking Select All OR deselect all providers in your list by clicking Deselect All..***

4. Type the provider information into the respective text boxes.

> **NOTE:** ***Checking the* Active *box means the provider will be available on drop-down lists when ordering tests.***

5. Click **Submit** to submit the changes.

Test Code Administration

The Test Code Administration page is used to manage the tests that will appear under the "My List" tab, which this tab will appear on the Order Tests, Change Order and Add-On features. Each drop-down list contains tests that have already been ordered at least once by your client.

1. From the **Settings** menu, select **Test Code Administration**.
2. Select the orderable tests from the drop-down lists.
3. Click **Update** to immediately update the orderable tests for your client.

> **NOTE:** ***The selection order has not bearing. My List is currently sorted by Test Description.***

4. A message will appear signifying the tests have been successfully updated.

Request New User

A Reference Web Portal administrator may use the Request New User feature to add a new user name to the selected client account.

1. From the **Settings** menu, select **Request New User**.
2. Type the first name of the new user into the **First Name** text box.
3. Press the **Tab** key.

   OR

   Click on the **Last Name** text box.
4. Type the last name of the new user into the **Last Name** text box.
5. Click the radio button to select **Administrator**, or **General User**.
6. Type in the Requestor Info (First Name, Last Name & Phone or Email).
7. Enter any **comments** into the text box.
8. Click on **Submit** to send the request.
9. A **User Request Confirmation** page will display.

NOTE: ***Marshfield Labs willl be sending you a form letter with the login and temporary password with two business days.***

Update User Security

User Permissions allows Reference Web Portal administrators to control user access to options within the account information menu.

1. From the **Settings** menu, select **Update User Security**.
2. Click on the hyperlinked **User Name** to edit.
3. Check the options to give the user access to.
4. Uncheck the options to deny the user access to.
5. Click **Submit** to make the necessary changes.
6. A message will appear signifying the assigned features or clients have been updated.

Select Active Client

This feature allows users with multiple clients to select which client they want to work in. Only one client may be used at a time.

1. From the **Settings** menu, choose **Select Active Client**.
2. Click on the radio button for the desired client.
3. Click **Submit**.
4. A message will appear signifying the viewable client has been updated.

NOTE: ***Throughout the web site, the displayed client will be shown in the top right corner of each page.***

Label Printing Settings

This section allows users to modify their label printing settings.

1. From the **Settings**, select **Label Printer Settings**.
2. Select a printer from the drop down list.
3. Select the number of label sets you need to copy.
4. Click **Apply**. **Configuration Settings** will set if you are **successful.**
5. Click the button below to print a test label.

Order Lab Test Settings

The settings will take affect for all web portal users under this client.

1. From the **Settings**, select **Order Lab Test Settings**.
2. Click to check or uncheck the desired settings.
3. Click **Submit**.

Unviewed Results Settings

This section will customize the behavior of the "Results" link in the top navigation bar by applying the selected settings.

These settings will also affect actions performed on the View Results page.

1. From the **Settings**, select **Order Lab Test Settings**.
2. Click to check or uncheck the desired settings.
3. Click **Submit**.

Packing List Settings

This section will customize the sorting behavior of the Packing List.

1. From the **Settings**, select **Packing List Settings**.
2. Click to check or uncheck the desired 'sort by' settings.
3. Click **Submit**.

Test Result Settings

This section will customize the shading behavior of the printed results.

1. From the **Settings**, select **Test Results Settings**.
2. Click to check or uncheck the desired 'shading' settings.
3. Click **Submit**.

This section will also customize the behavior of which results will be retrieved when batch printing and the behavior of the ‘sort by’ setting.

1. From the **Settings**, select **Test Results Settings**.
2. Click to check or uncheck the desired 'shading' settings.
3. Click **Submit**.