

## Training on Minert/I3 Client Portal

Client's login access provides two (2) main tabs- Customer Administration & Randoms Management. The first mentioned tab shows test result data and statistical reports. The second tab provides access to rosters and random pool selections.

The following brief tutorial is divided into three sections;

- Viewing Test Results (pg. 2)
- Updating Random Pools (pg. 6)
  - Options Completing Excel Spreadsheet or Editing "Random Pool List Reminder" Minert Email
  - Viewing Roster
- Viewing Random Selections (pg. 10)

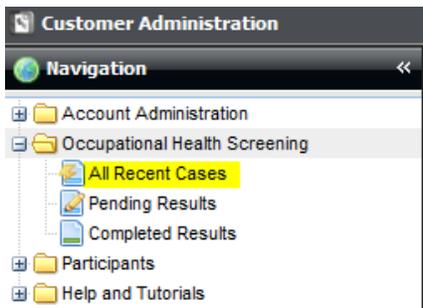
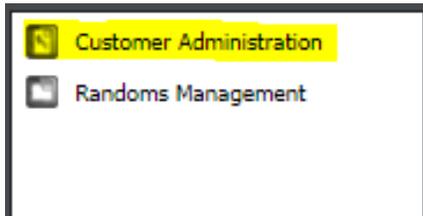
The START button in the lower left-hand corner accesses the different tabs-



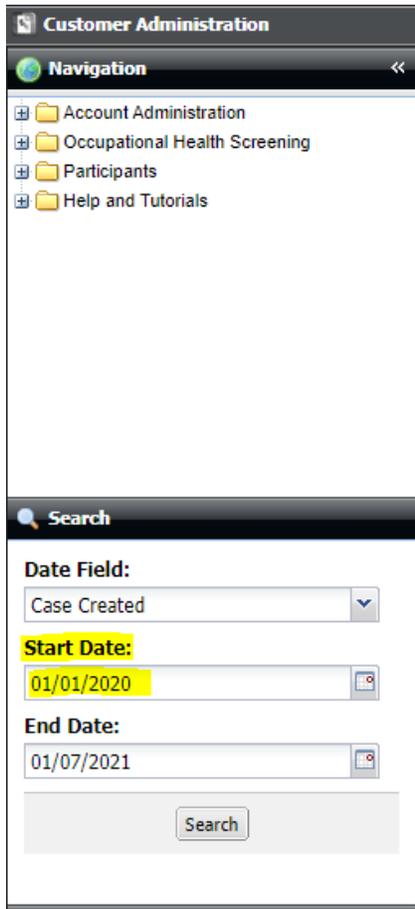
## VIEWING TEST RESULTS

Select “Customer Administration”

“All Recent Cases” is the tab you will view your test results



Make sure you adjust the Start Date to the beginning date that you would like to search for test results. This field automatically populates with a date two months previously. The earliest date to begin the search is 1/1/2020 when Minert began to use the I3 software.

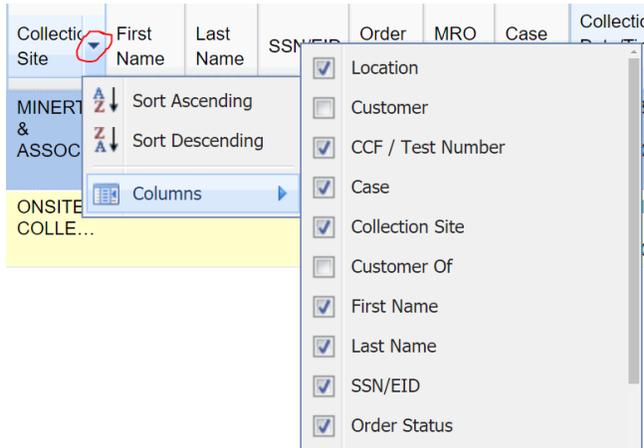


The key menu actions are; Result (view test result), Documents (view chain of custody), & Send (if you need to resend the result to contacts listed in your organization)

- “Documents” will always show DOT but possibly limited with NonDOT
- When clicking a menu item first highlight the donor and then proceed with the action
- The “Edit” feature should only be used for correction in donor name spelling. If other errors exist, please contact Minert



Columns can be added and removed hovering your mouse above a column heading and then clicking the drop-down arrow and then checking/unchecking the item. Ascending order and descending order is also able to sort by any column heading.

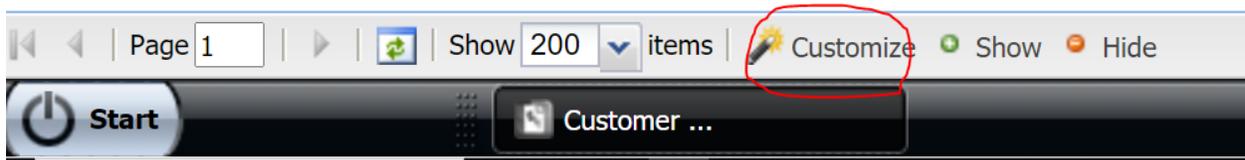


The recommended column headings are shown below

- “MRO Status” shows in processing when the donor is being contacted
- “Case Status” will change from open to closed when a result is ready
- The sequence of the test will go from “Collection Date/Time” to “Case Created” to “MRO Result Date”
- “Specimen Type” identifies “Breath” and “Urine/POCT”

Customer Administration																	
All Recent Cases																	
<span>+</span> Add <span>✎</span> Edit <span>📝</span> Notes <span>📧</span> Donor Pass <span>📧</span> Send Donor Pass <span>📧</span> Send Schedule Link <span>👁</span> Result <span>📄</span> Documents <span>📤</span> Upload Document <span>📧</span> Send <span>📄</span> Export <span>🗑</span> Delete <span>🔍</span> Search																	
	Location	CCF / Test Number	Case	Collection Site	First Name	Last Name	SSN/EID	MRO Status	Case Status	Collection Date/Time	Case Created	MRO Result Date	Reason For Test	MRO Result	Documents	Specimen Type	Program
+	MINERT GARB...	2020...	20...	MINERT & ASSOC.	John	Doe	123456		Closed	2020-08-19 14:56:00	2020-08-19 14:57...	2020-08-19 14:...	OTHER	BETWEEN .02 AND .039		BREATH	DOT
+	MINERT GARB...	7900...	20...	ONSITE COLLE...	John	Doe	64748...		Closed	2019-01-01 00:00:00	2020-01-29 10:49...	2020-01-29 10:...	OTHER	NEGATIVE		POCT	NONDOT

Save any changes you have made to your layout by clicking the 'Customize' on the bottom menu.



(End of Section Titled "Viewing Test Results")

## UPDATING RANDOM POOLS

### OPTIONS COMPLETING EXCEL SPREADSHEET OR EDITING “RANDOM POOL LIST REMNIDER” MINERT EMAIL

Rosters for random testing pools can be updated by emailing Minert:

- **Option 1** - An excel spreadsheet file in the correct format (separate spreadsheets for DOT & NonDOT) TO GET THE CORRECT EXCEL TEMPLATE CONTACT MINERT

#### DOT Spreadsheet

- **First Name**
- **Last Name**
- **Location** – Company Name
- **Company** – Company Name
- **CDL/Driver’s License** – State Initial and CDL# with no spaces

(These are the required fields)

First Name	Last Name	CDL/Drivers License	Location	Company
		(State Initial + CDL#)	(Company Name)	(Company Name)
		Example: WA123456		

#### NonDOT Spreadsheet

- **First Name**
- **Last Name**
- **SSN** - Full SSN (preferred) or the last 5 with no dashes
- **Location** – Company Name as it appears in i3
- **Company** – Company Name as it appears in i3
- **Job Group** – “None”

(These are the required fields others are just optional)

First Name	Last Name	SSN	Location	Company	Job Group
		(Full SS or Last 5 or Employee ID #)	(Company Name)	(Company Name)	"None"

- **Option 2** - Additions & removals completed by hand on the roster emailed by Minert on the 20<sup>th</sup> of the month before selections titled “Random Pool List Reminder” (Reminder example below). Remember even though this document only shows last four(4) digits please provide entire SSN for NonDOT or entire CDL# with state abbreviation at the beginning for DOT.



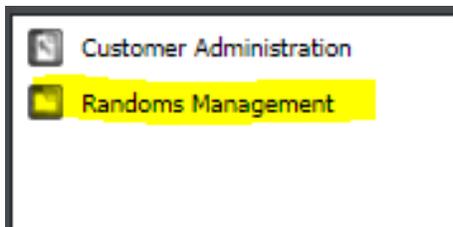
**Entities Assigned to Pool**  
**Report Date: 2020-10-15**

Entity Name	Type	Primary ID	Location	Added
JOHN DOE	participant	*****4321	Minert In-House	2020-01-18 15:51:56
SANTA CLAUS	participant	*****LAJS	Minert In-House	2020-01-18 18:51:48

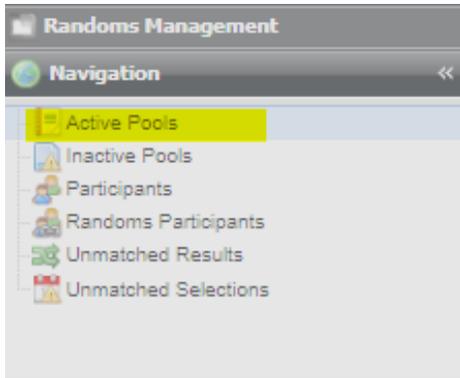
## VIEWING ROSTER

Viewing the roster can be done very quickly & from the same screen.

- On the start menu select “Randoms Management”



- If no random pool is displayed select “Active Pools”



- Then keep all fields blank and click the “Search” then your pools will be displayed

- Choose the correct pool and click “Entities”

Pool	Customer Of	Customer	Pool Id	Selection Type	Frequency	Employees	Last Run	Annual Drug Target	Completed Drug Tests	Drug Compliance (%)	Annual Alcohol Target	Completed Alcohol Tests	Alcohol Compliance (%)	Pool Manager
Minert Demo NonDOT Pool	MINERT AND ASSOCIATES INC	Minert In-House	18637	PARTICIPANT	Monthly	3	2021-06-01	2	0	0.00	1	0	0.00	Minert In-House

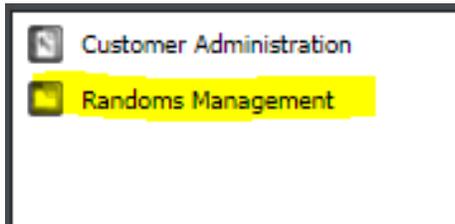
First Name	Last Name	Primary ID	Location	Company Name	Sta...	Participant Position
JOHN	DOE	ID987654321	Minert In-House	Minert In-House	Act...	
JANE	DOE	123456789	Minert In-House	Minert In-House	Act...	
JACK	FROST	10101010	Minert In-House	Minert In-House	Act...	

(End of Section Titled "Updating Random Pools")

# VIEWING RANDOM SELECTIONS

## VIEWING CURRENT & PAST PERIODS

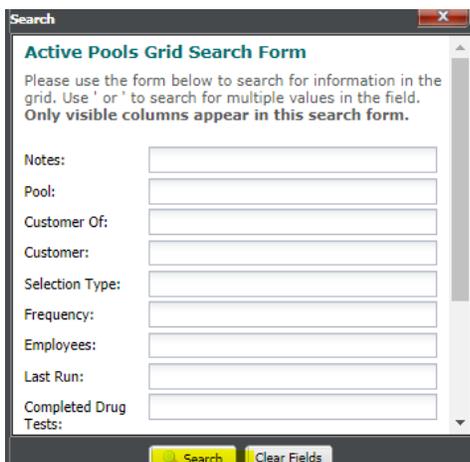
On the start menu select “Randoms Management”



If no pools are displayed select “Active Pools”



Then keep all fields blank and click the “Search” then your pools will be displayed



Choose the correct pool and click “Periods” or right-clicking and select “View Selection Periods”

- From the Company name drop down the cycles and periods will appear
- The Periods displayed in green have already been generated

First Name	Last Name	Sele... For Drug Testing	Employee ID	Location	Sele... For Alcohol Testing	Alco... Alter...	Drug Alter...	Rea... Not Tested	Drug Case Num...	Alco... Case Num...	Drug Rank	Alco... Rank
ERIC	CAL...	Yes	64957159	NORTH	Yes						0.00...	0.00...
Demo	test	Yes	292929	WEST	Yes						0.00...	0.00...
ELIZ...	GOR...	Yes	74349455	ATLANTIC							0.01...	0.01...
ELIEL	MAG...	Yes	82421849	EAST							0.01...	0.01...
EMIL	Abena	Yes	63850748	PACIFIC							0.02...	0.02...
ERIC	ESKI...	Yes	34465257	NORTH							0.02...	0.02...
Erica	Spe...	Yes	89504714	SOUTH							0.05...	0.05...
Mell...	Joh...		324234235	SOUTH							0.05...	0.05...
FELI...	ROD...		49109380	SOUTH							0.06...	0.06...
ELIZ...	TAR...		48545725	PACIFIC							0.07...	0.07...

Drug selections which have been completed will display a 13 digit number in column titled ‘Drug Case Number’ and similarly alcohol completed selections display a number in the column titled ‘Alcohol Case Number’

Employees which have been randomly selected but did not get tested during the selection period window of time, such as during that month or quarter, can be notated with the ‘Reason Not Tested’

- From the top menu bar select “Reason Not Tested”
- Enter the reason

Similar to Pg.4 diagram which explains how to view additional information concerning test results which is found under different column headings there is also additional columns for the random selections which is applicable if you provide spreadsheet rosters with information such as alternate id, supervisor, or division

Columns can be added and removed hovering your mouse above a column heading and then clicking the drop-down arrow and then checking/unchecking the item. Ascending order and descending order is also able to sort by any column

heading. Save any changes you have made to your layout by clicking the 'Customize' on the bottom menu.

(End of Training Material)