

Creating a New Order

After logging into the system, click on the expander (+) next to Occupational Health Screening under Navigation in the upper left-hand corner.

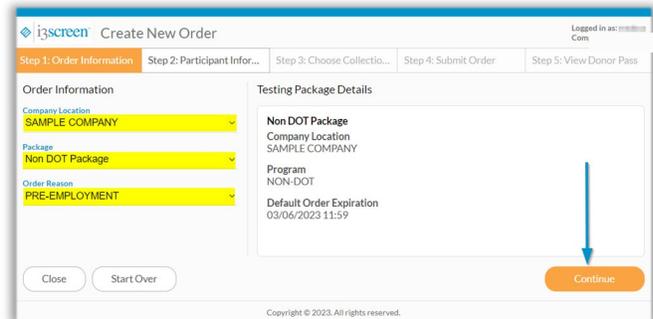
Click Create New Order to start an order. This opens a new browser tab.



Step 1: Order Information

When creating a new order, each current step is highlighted, and the top navigation bar shows the remaining steps to be completed.

Select the Company Location, Package, and Order Reason from the drop downs. The Testing Package Details section will populate as selections are made along with the package expiration date. If a DOT package is selected, the option to select Agency will appear and will need to be selected as well.



 Use the Tab button to get started.

Step 2: Participant Information

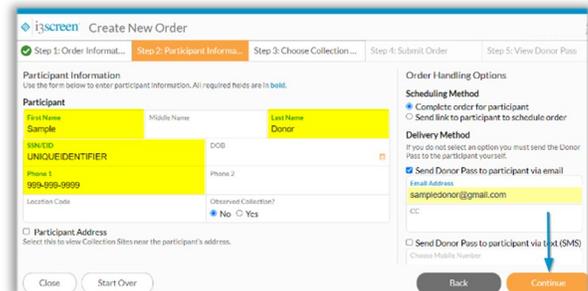
Enter the participant information; required fields are indicated with blue font. The SSN/EID needs to be unique, a minimum of 5 characters and can be alpha-numeric. DOT-FMCSA orders require the CDL number in the required state format. The required phone number must be the participant's, and not the ordering user's information.

Select the preferred Scheduling Method. Options include:

- 1) Complete Order for the Participant

Select the Delivery Method to send the donor pass to the participant via email (or text, if enabled). Enter an additional email address into the CC field to receive a copy of the donor pass.

The default search is the Customer Location address. Optional - Enter the participant address.

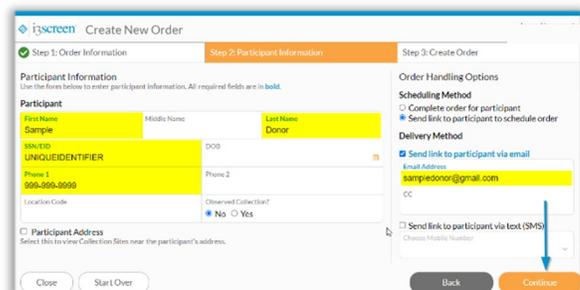


 Instead of adding the full participant address, adjust the starting address zip code during the collection site search.

- 2) Send Link to Participant to Schedule Order

Select the Delivery Method for the scheduling link (email or text, if enabled). Enter an additional email address into the CC field to receive a copy of the scheduling link.

Click Continue. Go to Step 4.

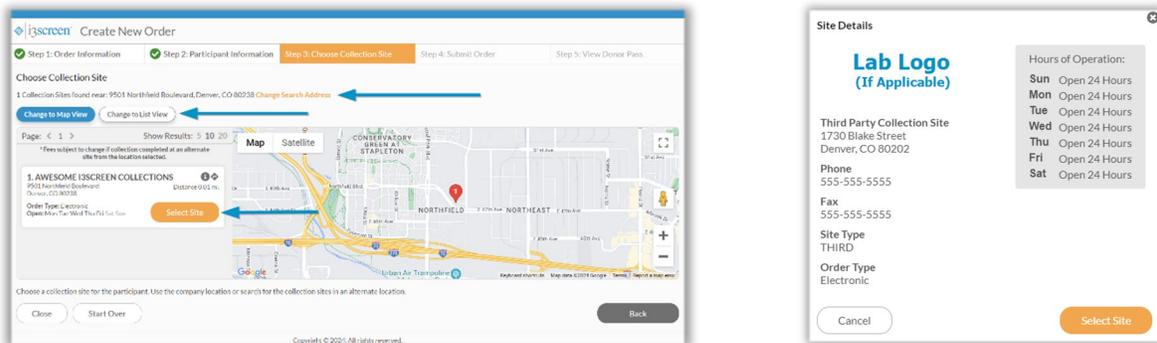


Step 3: Choose Collection Site

The collection site search page has a similar format to the Participant scheduler link. This step defaults to List view.

Review the available collection sites. The search starting location can be changed from the initial address by clicking Change Search Address. Toggle between the Map and List view by clicking Change to Map View or Change to List View.

View more details about the collection site by clicking Select Site. Confirm the collection site selection by clicking Select Site again and proceed to Step 4.



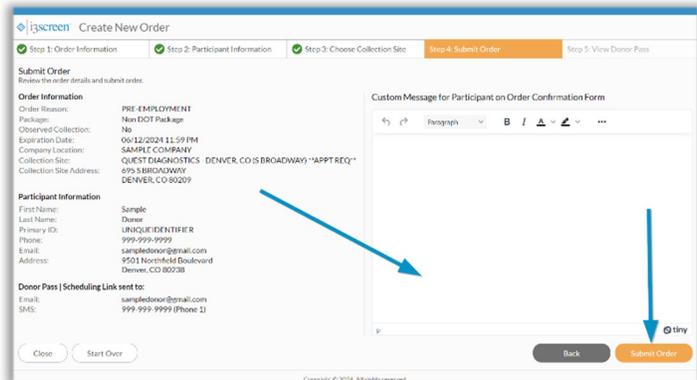
Step 4: Submit Order

Review the Order and Participant Information. Click Back if the information needs to be changed prior to generating the Donor Pass.

Optional - Enter a Custom Message for the Participant which will appear on the donor pass.

Click Submit Order.

Note: This is Step 3 when sending a link via email or text message.



Step 5: View Donor Pass

Services that are electronic will show a barcode with the Order Number. If the order has a barcode and the Donor Pass was emailed, the participant can provide the barcode to the collector using their smartphone. The Donor Pass can also be printed or downloaded.

Click Close to exit or "Start Over" to initiate a new order.

