# Outreach Portal Quick User Guide

# Accessing the Portal

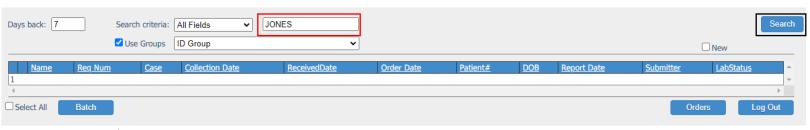
Go to <a href="https://outreach2.psychesystems.com/NetOutreachUL/login.aspx">https://outreach2.psychesystems.com/NetOutreachUL/login.aspx</a>. Use the provided username and default password to log in. You will be prompted to change your password the first time you log in.

• There is also a "Forgot Password" option which will send a password reset to the user's email.

**IMPORTANT NOTE:** Do not use the Back button to navigate Outreach! Only use the buttons to navigate.

# Result Manager

The default screen upon login is the Result Manager. It shows as blank until a search is conducted.



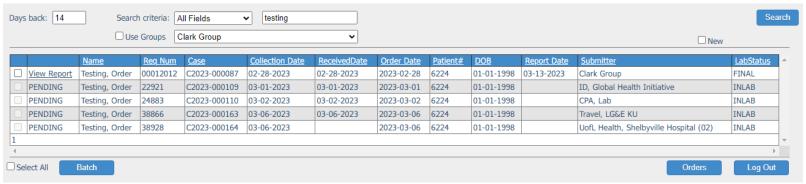
# Searching/Result List

Use the "Days back" field to select the number of days back you'd like to search – the default is 7.

Then, in the Search box (in red above), you can search by full or partial name, ordering facility, date of birth, and other fields. If nothing is entered in this box, all results from the selected "Days back" will appear. Click **Search**.

**Note:** you cannot yet search by MRN or accession number; this functionality is scheduled to be added in the future.

Additional note: each facility will be linked to only one Group, so you can ignore the "Use Groups" checkbox.



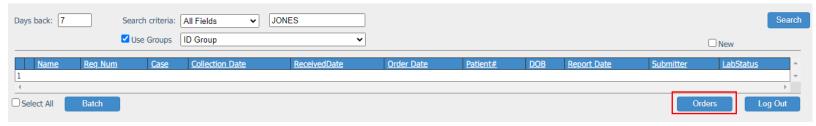
After searching, cases will appear in the Result Manager. Their status will be either INLAB (if case is not complete) or FINAL (if case is complete). Columns can be sorted by clicking the heading name.

#### Viewing Results

Once a case is complete, the result report can be viewed by clicking "<u>View Report</u>." Result report PDFs can then be viewed, printed, and/or saved. Checking the "Select All" box and clicking "Batch" will compile all final reports into one PDF.

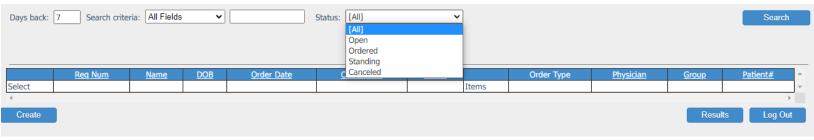
# Order Manager

From the default Results page, click the "Orders" button to go to the Order Manager.



### Searching/Order List

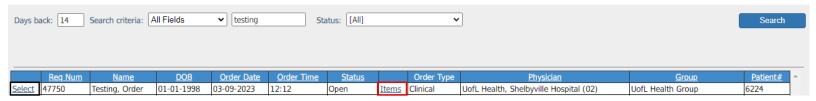
This page will also initially appear empty, but you can search to populate orders. The search function here is similar to the Result Manager, but adds the option to search by case status:



#### Case status options:

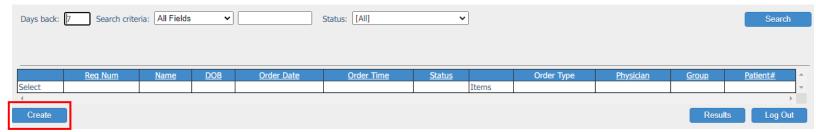
- Open order has been placed and can be edited; specimen has not been received by ID Lab
- Ordered order has been placed and **cannot** be edited; specimen has been received by ID Lab. If changes to the order need to be made, call the ID Lab at (502) 852-1152.
- Standing: ID Lab does not use this order type.
- Canceled: order has been placed, but was canceled.

To quickly view which tests have been ordered on a case, click "Items" (red box below). To view the full order, click "Select" (black box). This will bring up the Order Entry page – see next section.

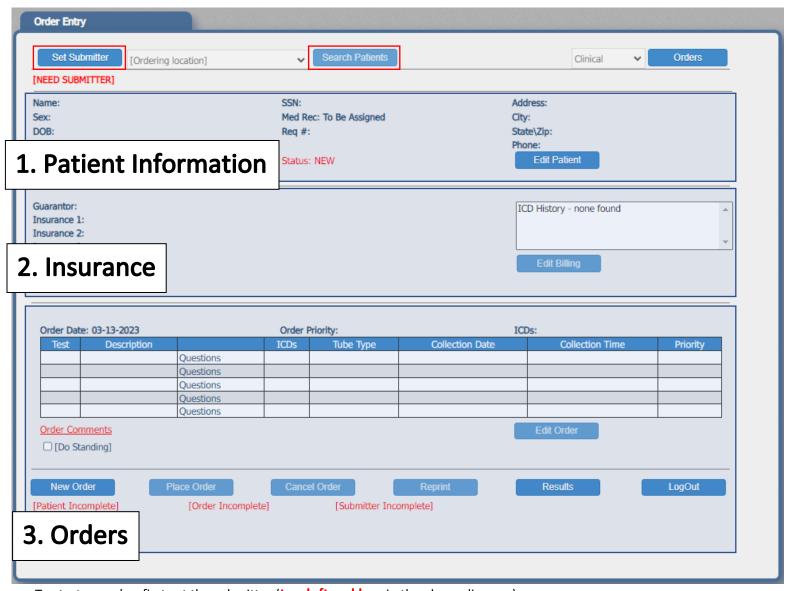


## Order Entry

To place a new order, click "Create" from the Order Manager screen.



The **Order Entry** page will appear. There are three "panes" on this screen: Patient Information, Insurance, and Orders.



To start an order, first set the submitter (top left red box in the above diagram).

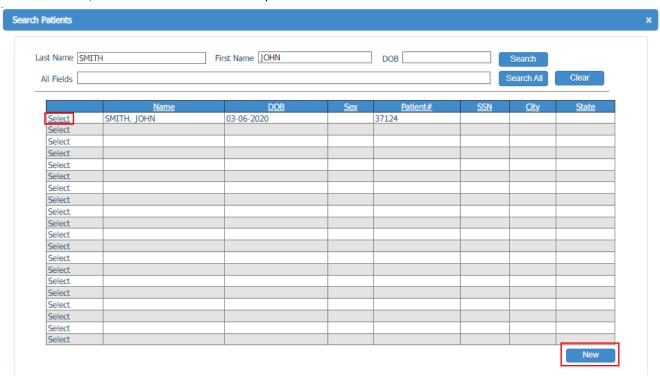
- If you have access to only one facility, this should populate by default with your facility's name and you will not be able to click "Set Submitter."
- If you have access to more than one facility, click "Set Submitter" and then click "Select" next to the facility.

Next, click Search Patients (middle red box) and search for the patient by last name, first name, or date of birth. Always search for an existing patient before adding a new one.

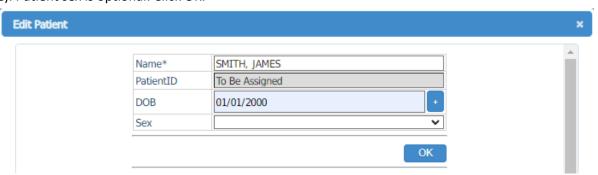
**Note:** as with the Result Manager, you cannot yet search by MRN or accession number, but this functionality is scheduled to be added in the future.

#### Patient Search

In the Search Patients window, if your patient appears, click "Select" and skip to the "Back to Order Entry" section below. Otherwise, click "New" to create a new patient.



When adding a new patient, enter name in all capitals and date of birth in MM/DD/YYYY format (or use the calendar to select a date). Patient sex is optional. Click OK.



### Back to Order Entry

Next you will return to the Order Entry screen. The patient details provided will now appear in the Patient pane.

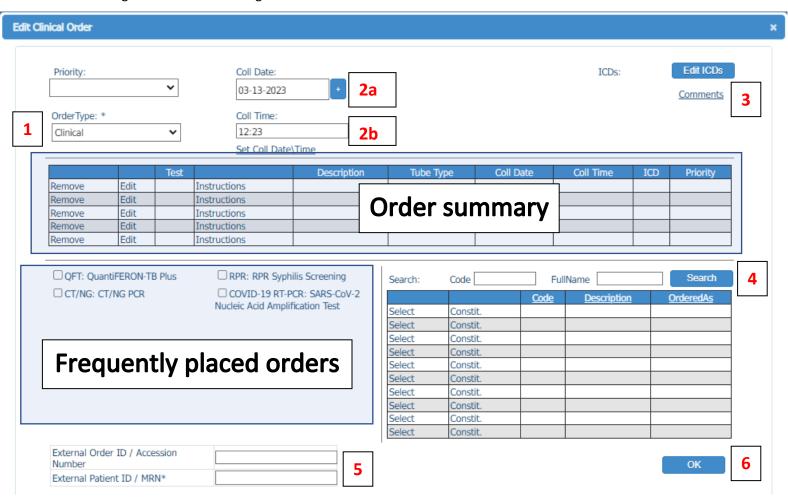
- IDL does not bill insurance, so that pane will remain blank.
- The next step is to add or edit orders see below.

In the Order pane, click "Edit Order" to begin an order.

Order Date: 03-13-2023			Order Priority:		ICDs:		
Test	Description		ICDs	Tube Type	Collection Date	Collection Time	Priority
		Questions					
		Questions					
		Questions					
		Questions					
		Questions					
Order Comments  ☐ [Do Standing]						Edit Order	

#### **Fdit Clinical Order screen**

Proceed through this screen following the numbered order below:



- 1. Order Type: select Clinical except for research-use testing (currently only for *S. pneumoniae* serotyping).
- 2. Collection date (a) and time (b): these can be typed or entered via the calendar. They default to the current date and time.
- 3. Comments: add any order comments here if needed.
- 4. Search: search for the test being ordered. Clicking the "Search" button will bring up the entire list of orderable tests. Entering part or all of the test name in the "FullName" box will narrow the search results.
  - a. Click "Select" to add the test to the order. The ordered tests will appear in the Order Summary pane.
  - b. Frequently placed orders will appear in the pane to the left and can be selected quickly.

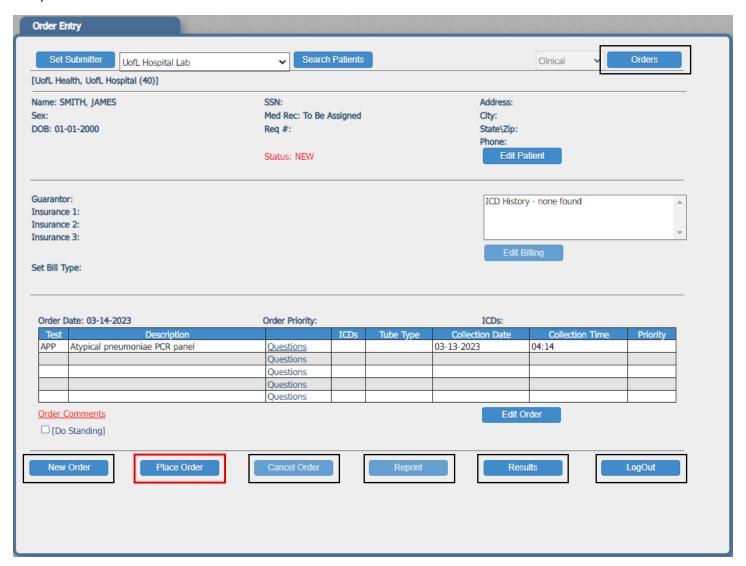
c. Upon selecting a test, you may be prompted for a specimen type. Select the appropriate response and click OK.



- 5. MRN and Accession Numbers: MRN is required; accession number is optional.
- 6. Click OK to save the test.

## Finalizing the Order

After saving the test, you will be returned to the Order Entry screen. Click "Place Order" to complete the order and print a requisition form.



Once the order is placed, the "Cancel Order" and "Reprint" buttons will be clickable. You can cancel the order if it has not been received by IDL; you can reprint the requisition form at any time.

At this screen, you can also click "New Order" to create another order, "Orders" to view the Order Manager, "Results" to view the Result Manager, or "LogOut."