

Outreach Portal Quick User Guide

Accessing the Portal

Go to <https://outreach2.psychesystems.com/NetOutreachUL/login.aspx>. 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.

Days back: 7 Search criteria: All Fields JONES

Use Groups ID Group New

Name	Req Num	Case	Collection Date	ReceivedDate	Order Date	Patient#	DOB	Report Date	Submitter	LabStatus
1										

Select All Batch Orders Log Out

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.

Days back: 14 Search criteria: All Fields testing

Use Groups Clark Group New

	Name	Req Num	Case	Collection Date	ReceivedDate	Order Date	Patient#	DOB	Report Date	Submitter	LabStatus	
<input type="checkbox"/>	View Report	Testing, Order	00012012	C2023-000087	02-28-2023	02-28-2023	2023-02-28	6224	01-01-1998	03-13-2023	Clark Group	FINAL
<input type="checkbox"/>	PENDING	Testing, Order	22921	C2023-000109	03-01-2023	03-01-2023	2023-03-01	6224	01-01-1998		ID, Global Health Initiative	INLAB
<input type="checkbox"/>	PENDING	Testing, Order	24883	C2023-000110	03-02-2023	03-02-2023	2023-03-02	6224	01-01-1998		CPA, Lab	INLAB
<input type="checkbox"/>	PENDING	Testing, Order	38866	C2023-000163	03-06-2023	03-06-2023	2023-03-06	6224	01-01-1998		Travel, LG&E KU	INLAB
<input type="checkbox"/>	PENDING	Testing, Order	38928	C2023-000164	03-06-2023		2023-03-06	6224	01-01-1998		UofL Health, Shelbyville Hospital (02)	INLAB

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Select All Batch Orders Log Out

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 “[View Report](#).” 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.

Days back: Search criteria: All Fields
 Use Groups ID Group

Name	Req_Num	Case	Collection Date	ReceivedDate	Order Date	Patient#	DOB	Report Date	Submitter	LabStatus
1										

Select All

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:

Days back: Search criteria: All Fields Status:
[All]
Open
Ordered
Standing
Canceled

Req_Num	Name	DOB	Order Date	Status	Order Type	Physician	Group	Patient#
Select					Items			

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.

Days back: Search criteria: All Fields Status: [All]

Req_Num	Name	DOB	Order Date	Order Time	Status	Items	Order Type	Physician	Group	Patient#	
Select	47750	Testing, Order	01-01-1998	03-09-2023	12:12	Open	Items	Clinical	UofL Health, Shelbyville Hospital (02)	UofL Health Group	6224

Order Entry

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

Days back: Search criteria: Status:

Select	Req_Num	Name	DOB	Order Date	Order Time	Status	Items	Order Type	Physician	Group	Patient#
<input type="button" value="Create"/>											

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

Order Entry

[Ordering location] Clinical

[NEED SUBMITTER]

1. Patient Information

Name: SSN: Address:
Sex: Med Rec: To Be Assigned City:
DOB: Req #: State\Zip:
Phone:
Status: NEW

Guarantor: ICD History - none found
Insurance 1:
Insurance 2:

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]

3. Orders

[Patient Incomplete] **[Order Incomplete]** **[Submitter Incomplete]**

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.**

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](#) Edit Order

[Do Standing]

Edit Clinical Order screen

Proceed through this screen following the numbered order below:

Edit Clinical Order x

Priority:

1 OrderType: *

Coll Date: 2a

Coll Time: 2b

Set Coll Date\Time

ICDs: Edit ICDs

[Comments](#) 3

Remove	Edit	Test	Description	Tube Type	Coll Date	Coll Time	ICD	Priority
Remove	Edit		Instructions					
Remove	Edit		Instructions					
Remove	Edit		Instructions					
Remove	Edit		Instructions					
Remove	Edit		Instructions					

Order summary

QFT: QuantiFERON-TB Plus RPR: RPR Syphilis Screening

CT/NG: CT/NG PCR COVID-19 RT-PCR: SARS-CoV-2 Nucleic Acid Amplification Test

Frequently placed orders

Search: Code FullName Search 4

Select	Code	Description	OrderedAs
Select	Constit.		

External Order ID / Accession Number 5

External Patient ID / MRN*

OK 6

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.

Questions
✕

Priority: Collection Date: + Collection Time:

Source*

Bronchoalveolar Lavage
 Cerebrospinal fluid
 Isolate
 Nasopharyngeal swab
 Oropharyngeal swab
 Other - see comments

Plasma
 Serum
 Sputum
 Urine
 Whole Blood

- 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.

Order Entry
✕

[UofL Health, UofL Hospital (40)]

Name: SMITH, JAMES
Sex:
DOB: 01-01-2000

SSN:
Med Rec: To Be Assigned
Req #:

Status: NEW

Address:
City:
State/Zip:
Phone:

Guarantor:
Insurance 1:
Insurance 2:
Insurance 3:

Set Bill Type:

ICD History - none found

Order Date: 03-14-2023 Order Priority: ICDs:

Test	Description	Questions	ICDs	Tube Type	Collection Date	Collection Time	Priority
APP	Atypical pneumoniae PCR panel	Questions			03-13-2023	04:14	
		Questions					
		Questions					
		Questions					

[Order Comments](#)
 [Do Standing]

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.”