OpenELIS Final Report Statewide Web Portal User Guide

Logging in

- Go to the State Hygienic Laboratory at The University of Iowa's web site at www.shl.uiowa.edu .
- Click on the green **Test Results** button on the left-hand side.
- Click on the green **OpenELIS** button.
- Login using your username and password. (This is a secure site. Your username and password are encrypted as they are sent for authorization.)
- If you use a shared computer, please click the **Logout** button in the top right corner and then exit the browser after completing your session.
- Supported web browsers are recent versions of: Firefox, Chrome, Safari, Internet Explorer.

Message of the Day

- The Message of the Day is displayed upon login. It contains important announcements regarding the OpenELIS Web Portal.
- You can click on the orange SHL logo anytime that you wish to return to this page.

Searching for Your Final Reports

- Click on the **Final Report** icon.
- You only need to enter information in one field to conduct a search for your results. Example fields include: **Collected Date**, **Accession Number**, **Collector** or **Patient's Last Name**. (See Figures 1 and 2.)
- It is recommended that you use the calendar to the right of each date field when entering a date to eliminate any formatting errors. You must click out of the calendar to enter the selected date. All dates have the format of YYYY-MM-DD. **Released Date** also includes the time in the format of YYYY-MM-DD HH:MM.
- You may also narrow your search by entering information in multiple fields. For example, to find all of the samples that you collected and sent to the laboratory in June of 2014, enter your name (as it appeared on the collection form) in the **Collector** field and select (using the calendars provided) 2014-06-01 in the **Collected Date** field and 2014-06-30 in the **To** field.
- The system supports wild card searches in the following fields: **Client Reference**, **Collector**, **PWS ID**, **Patient's First Name** and **Patient's Last Name**. To use this search method add an * at the beginning and/or end of your search term. Below are three examples:
    - To see a list of reports for a patient whose last name starts with the letters schm, enter schm* in the **Patient's Last Name** field. Matches would include: schmidt, schmitt, schmitz, etc.

- To see a list of reports for a patient whose first name ends with the letters jo, enter *jo in the **Patient's First Name** field. Matches would include: betty jo, bettyjo, jo, etc.
- To see a list of reports for samples with a collector name of buck, enter *buck* in the **Collector** field. Matches would include: joseph buck, joe buck, j buck, buck joseph, buck joe, buck j, etc.

- Enter the **Patient's Date of Birth** in this field to search by that information. You must enter an ending date in the **To** field to search for a range of birth dates.

- Click on the Tool Tip ⊕ to the right of each field to view information about the use and format of that field.

- Click the **Find Samples** button to display a list of samples that match your search criteria. The **Reset** button clears all of the search fields.

Figure 1 Searching by a Collected Date Range

Figure 2 Searching by a Patient's Last and First Name

Viewing Your Final Reports

- A list of final reports that match your search criteria will be displayed on the next screen. (See Figure 3.)
- To view all reports of the listed samples, click on the **Select All** button, and then the **Run Report** button.
- To view specific reports, check the boxes in front of their **Accession Numbers**, and then click the **Run Report** button.
- The PDF reports of the selected samples will pop up. You may view, save, or print your PDF reports.
- The following are descriptions of each column on this screen.

Accession Number: The lab number assigned to the sample by the laboratory.

Collected Date: The date and time that the sample was collected. All dates and times have the format of YYYY-MM-DD HH:MM.

Reference Information: This information can be helpful in identifying a sample. The patient's name is usually displayed for clinical samples. The collector's name is usually displayed for environmental, safe drinking water, and private well samples. The type of animal is displayed for animal samples (e.g., rabies testing).

Additional Information: This information can also be useful in identifying a sample. The collection location, address, and city (if submitted) are displayed for environmental and private well samples. The collection location (if submitted) and PWS ID-PWS Name are displayed for

safe drinking water samples. The health care provider's/veterinarian's/public health professional's name (if submitted) and the submitting organization are displayed for clinical and animal samples.

Status: The sample's status is shown here. "In Progress" samples have one or more tests that are not yet complete and at least one test that is finished. The finished test's results are currently available on the Final Report. "Completed" samples have finished testing and all of their results are available on the Final Report.

Project: The name of the project that has been assigned to the sample. A project can be used to group samples with a similar purpose.

Attachments: The number of documents attached to each sample (if any) are shown in this column. First, click on the number to display the list of attachments. (See Figure 4.) Next, click on the attachment that you want to display. Attachments may include the test request form (begins with the prefix "TRF"), previous revisions of final reports (begin with the prefix "FinalReport"), copies of email correspondence, send-out lab reports, and laboratory instrument output.

Final Report

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	Accession Number	Collected Date	Reference Information	Additional Information	Status	Project	Attachments
☐	235901	2017-01-03 09:35	[patient] DOE, JANE	WELBY, MARCUS ANYTOWN HOSPITAL	Completed		1
☐	235905	2017-01-03 10:00	[collector] mouse mickey	dining hall 1000 MEDICAL ST ANYTOWN	In Progress	01wqfmm	1
☐	235911	2017-01-03 08:30	[patient] DOE, JANE	DOE, JOHN ANYTOWN HOSPITAL	Completed		3
☐	235912	2017-01-04 11:45	[patient] DOE, JANE	WELBY, MARCUS ANYTOWN HOSPITAL	Completed		1
☐	235913	2017-01-04 09:45	[patient] DOE, JANE	WELBY, MARCUS ANYTOWN HOSPITAL	Completed		2
☐	235935	2017-02-10 12:45	[animal] Skunk	DOE, JOHN ANYTOWN HOSPITAL	Completed		1
☐	235940	2017-02-13 06:30	[collector] potter harry	lower level men's bathroom tap IA5225209-IOWA CITY LANDFILL & RECYCLING	Completed		1

7 samples have been found.

Select All	Unselect All	Run Report

Figure 3 Final Report Listing

Accession Number: 235911

Attachments
TRF-235911-CM-I.pdf
FinalReport 235911 R 0
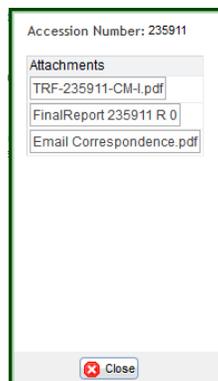Email Correspondence.pdf

❌ Close

Figure 4 Sample Attachment List

Final Report Statewide

- The Final Report Statewide option allows the user to search for and display the final report for a particular type of sample that was submitted from anywhere in the state. For instance, the user may have permission to search for and display the final report for any clinical and animal samples submitted from an organization in Iowa. Click on the **Final Report Statewide** icon to use this feature.
- The first step is to search for your desired samples. The Final Report Statewide search screen works the same way as the one for final reports. See **Searching for Your Final Reports** for suggestions on how to conduct a search.
- There is one additional field that you can use to search for samples through the Final Report Statewide search screen: **Laboratory Section**. (See Figure 5.) This field can be used to limit your search to one or more laboratory sections that performed the tests on the samples.

Figure 5 Searching by Laboratory Section

- After entering your search information, click the **Find Samples** button. The **Reset** button clears all of the search fields.
- A list of final reports that match your search criteria will be displayed on the next screen. (See Figure 6.)
- The final reports are generated in the same manner as in the Final Report screen. See **Viewing Your Final Reports** for this procedure.

Figure 6 Final Report Statewide Listing

Spreadsheet View

- The Spreadsheet View option will display your results in a spreadsheet that you can sort and filter. It can be used to compare results from the same sampling location or the same patient over time, among other things. Click on the **Spreadsheet View** icon.
- The first step is to search for the results that you would like to be displayed in the spreadsheet. The Spreadsheet View search screen works the same way as the one for final reports. See **Searching for Your Final Reports** for suggestions on how to conduct a search.
- After entering your search information, click the **Continue to Report Fields** button. The **Reset** button clears all of the search fields.
- The next page will display groups of fields containing sample, organization, analysis, patient, and other information which you can select to be displayed as columns in your spreadsheet. (See Figure 7.) This screen also shows all of the test analytes and auxiliary data that matches your search criteria. You need to select at least one **Test Analyte** or **Auxiliary Data** field to run the report. You can use the **Select All** buttons if you want to view all of the available information in a group.
- Click the **Run Report** button to pop up the spreadsheet containing all of the data that you selected. You may view, save, or print your spreadsheet reports. (See Figure 8.)

Figure 7 Selecting Fields to Output to Your Spreadsheet

Figure 8 Spreadsheet View

Disclaimer

Results from the **Spreadsheet View** represent analytical values as of the date they are generated. Future revisions may affect these results and official final results should be reviewed from the **Final Report** option to assure their accuracy.

Test Status

- The Test Status option will display the status of each test that is being performed on your samples. The Collected Date, Received Date, Client Reference, and any QA Events will also be shown. Click on the **Test Status** icon.
- The first step is to search for your desired samples. The Test Status search screen works the same way as the one for final reports. See **Searching for Your Final Reports** for suggestions on how to conduct a search.
- After entering your search information, click the **Find Samples** button. The **Reset** button clears all of the search fields.
- A list of samples matching your search criteria will be displayed. (See Figure 9.)
- The following are descriptions of each column on this screen.

    Accession #: The lab number assigned to the sample by the laboratory.

    Sample/Test Description: The Sample Description is displayed in the first row for each Accession #. The patient's name is usually displayed for clinical samples. The collector's name is usually displayed for environmental, safe drinking water, and private well samples. The type of animal is displayed for animal samples (e.g., rabies testing). The Test Descriptions are displayed in the remaining rows for each Accession #. There may be a footnote at the end of a Sample or Test Description which is explained in the QA Event column. If a footnote is after the Sample Description, it applies to the entire sample. If a footnote is after a Test Description, it applies to only that test.

    Test Status: The test's status is shown here. "In Progress" tests have not been finished. "Completed" tests have finished testing and their results are available on the Final Report or through the Spreadsheet View.

    Collected Date: The date and time that the sample was collected. All dates and times have the format of YYYY-MM-DD HH:MM.

Date Received: The date and time that the sample was received at the laboratory. All dates and times have the format of YYYY-MM-DD HH:MM.

Client Reference: This value is a piece of information that your organization provided on the sample paperwork. It could be your organization's lab number, a patient ID/Chart ID/Medical Record Number or another unique identifier for a sample.

QA Event: Any quality assurance issue that applies to your entire sample or an individual test is displayed in this column.

Accession #	Sample/Test Description	Test Status	Collected Date	Date Received	Client Reference	QA Event
25763	doe john			2015-02-03 06:45	2015-02-04 15:02	
	Prep for Acid Herbicides, SOP UHL-H-025 LC/MS/MS	Completed				
	Acid Herbicides, SOP UHL-H-025 LC/MS/MS	In Progress				
154980	POTTER, HARRY₁			2015-02-03 15:05	2015-02-04 11:30	
	Culture for Acid Fast Bacillus, Bacterial Culture₂	Completed				1. Sample was leaking upon receipt. Integrity of sample is questionable.
	Fluorescent Stain for AFB, Fluorochrome (Auramine-Rhodamine Stain)	Completed				2. There will be no charge for this testing.
	Blood Lead Screening, Graphite Furnace AA	In Progress				
	Culture for Acid Fast Bacillus, Bacterial Culture	In Progress				

Figure 9 Test Status Listing

Email Notification

- The laboratory can send an email to specified email addresses whenever a new sample is received or when a result is available. You can choose whether the notification emails are sent for either or both types of events. Click on the **Email Notification** icon.
- You can also add a filter so that you will only receive email notifications from the laboratory that match that filter. This allows the user to only receive email notifications for samples that she collects, where she is the provider, or that have a specific Client Reference.

To Add Your Email Address (See Figure 10.)

- Click on the **Add** button to enter a new email address.
- Select your organization from the dropdown list in the **Organization** field.
- Enter your email address in the **Email** field.
- Check **Received** or **Released** or both to receive notifications for each type of event.
- Click the **Save Changes** button to complete the process.

To Add an Email Notification Filter (Optional) (See Figure 10.)

- If you wish to add an email notification filter, select the **Filter By** field (Client Reference, Collector, or Provider) by which you want to filter your email notifications.
- Enter the text that you want to match your filter in the **Filter Match** field. Examples include the last name of the collector or provider or a common word or number that is used in the Client Reference field of your samples.
- Click the **Save Changes** button to complete the process.

To Edit an Existing Email Address or Filter

- Click on any cell in the entry that you want to edit.
- Type in the new email address or filter information.

- Click the **Save Changes** button to complete the process.

To Remove an Email Notification

- Select the entry that you want to remove. Click the **Remove** button.

Organization	Email	Filter By	Filter Match	Received	Released
SHL ANKENY	michael-hayek@uiowa.edu	Collector	hayek	☑	☑

Figure 10 Signing Up for Email Notification

Changing Your Password

- You can click the **Change Password** button in the top right corner or go to https://www.shl.uiowa.edu/pwm/private/Login to change your password.
- Keep your new password secure. If you must write it down, be sure to keep it in a safe place.
- Your new password must meet the following requirements:
    - Password is case sensitive.
    - Must be at least 9 characters long.
    - Must be no more than 25 characters long.
    - Must not include any of the following values: test password
    - Must not include part of your name or username.
    - Must not include a common word or commonly used sequence of characters.
    - Must have at least three types of the following characters:
        - Uppercase (A-Z)
        - Lowercase (a-z)
        - Number (0-9)
        - Symbol (!, #, $, etc.)

Questions/Help

- Questions regarding the OpenELIS Web Portal may be directed to ask-shl@uiowa.edu or to 319/335-4358.