OpenELIS Statewide Web Portal User Guide

The OpenELIS Web Portal has been redesigned to be more responsive; it is now easier to use on tablets, laptops, and cell phones.

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 Logout on the Account menu and then close the browser after completing your session.
- Supported desktop web browsers are recent versions of: Firefox, Chrome, Opera, Safari, and Microsoft Edge (version 15 and above). Mobile browser compatibility includes Apple iPhone and iPad and Android devices.

Account Menu

- The Account menu (See Figure 1.) in the top right corner of the Home page displays the name and username of the user.
- There are links to logout of the web portal and to change the user’s password.
- The user can adjust the font size of the screen text and change the Display Mode (Dark, Calm, Lite).
- There are also links to related forms and user guides.

Buttons and Menus

- The Home page of the OpenELIS Web Portal contains a button for each module for which you have been assigned permissions. The Reports menu also lists these modules. You can open a module by clicking on its button or selecting it from the Reports menu. (See Figures 2 - 3.)
News

- The red badge above the newspaper icon displays the number of news articles that are available pertaining to the laboratory and the web portal. Click on this icon to display the articles.

Help Text

- A Help button located in the lower right corner of each screen will display helpful information regarding the use of that screen.

Final Report Statewide Screen

- The Final Report Statewide screen allows the user to search for and download the final reports for a particular sample domain(s) for samples that were submitted by organizations anywhere in a state or for patients that reside in a specified state. For instance, the user may have permissions to search for and download the final reports for any clinical samples submitted to the laboratory for patients that reside in a specified state.
- Click on the Final Report Statewide button (or select it from the Reports menu).
- You only need to enter information in one field to conduct a search for samples. Example fields include: Collected Date, Released Date, Accession Number, Collector, or Patient’s Last Name. (See Figures 4-5.)
- It is recommended that you click in a date field and use the calendar when entering a date to eliminate any formatting errors. Clicking on the word “TODAY” at the bottom of the calendar will insert the current date (or date and time). You can also type the dates if you prefer. 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 for patient Jane Doe who was born on May 3, 1985 enter DOE in the Patient’s Last Name field, JANE in the Patient’s First Name field, and 1985-05-03 in the Patient’s Date of Birth Start field. (See Figure 6.)
- A search may also be limited to one or more projects, laboratory sections performing the testing, or a sample domain. If these fields are left empty, all samples to which you are authorized will be displayed regardless of the laboratory section that is performing the testing, the sample domain, or whether they have an assigned project. (See Figure 7.)
• The system supports wild card searches in the following fields: **Client Reference, Collector, Location, Patient’s Last Name** and **Patient’s First Name**. To use this search method add an * at the beginning and/or end of your search term. Below are three examples:
  o To see a list of samples 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.
  o To see a list of samples 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.
  o To see a list of samples that were collected by a person with the 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 the Start field to search by that information. To search by a range of dates enter a Start date and an End date.
• 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 4 Searching by a Collected Date Range](image)

![Figure 5 Searching by a Released Date Range](image)
Viewing Final Reports

- A list of samples that match your search criteria will be displayed on the next screen. (See Figure 8.)
- To view reports for all of the listed samples, click 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**: The lab number assigned to the sample by the laboratory.

  **Collected Date**: The date (and time if submitted) 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, date of birth (DoB), and gender are usually displayed for patient samples. The collector's name and the collection location is
usually displayed for environmental and safe drinking water samples. The type of animal and the collection location is usually displayed for animal samples (e.g., rabies testing).

Additional Information: This information can also be useful in identifying a sample. The collection address and city (if submitted) are displayed for environmental samples. The 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 submitting organization are displayed for patient 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.

Lab Section: The name(s) of the laboratory section(s) that performed the test(s) on the sample.

Attachments: The number of documents attached to each sample (if any) are shown in this column in a red circle. First, click on the paper clip icon to display the list of attachments. (See Figure 9.) Next, click on the name of the attachment that you want to display. Attachments may include the test request form (begins with the prefix "TRF"), original and subsequent versions of final reports (begin with the prefix "FinalReport"), copies of email correspondence, send-out lab reports, and laboratory instrument output.
Test Status Statewide Screen

- The Test Status Statewide screen will display the status of each test that is being performed on the queried samples. The Collected Date, Received Date, Client Reference, and any QA Events will also be shown. The user will have access to view the status of any test of a particular sample domain(s) for samples that were submitted by organizations anywhere in a state or for patients that reside in a specified state. For instance, the user may have permissions to view the status of any clinical samples submitted to the laboratory for patients that reside in a specified state.
- Click on the **Test Status Statewide** button (or select it from the Reports menu).
- The first step is to search for your desired samples. The Test Status Statewide search screen works the same way as the Final Report Statewide search screen. See [Final Report Statewide Screen](#) 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 10.) The real-time status of each test that is being performed is shown. Samples will not be displayed until they have been entered into and verified through the laboratory’s information system.
- 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 number. The patient's name (in uppercase letters) is usually displayed for patient samples. The collector's name (in lowercase letters) is usually displayed for environmental and safe drinking water 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 number. They consist of the “test name, method name”. 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 only applies to that test.

**Lab Section**: The name of the laboratory section that performed each test on the sample.

**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.

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

**Received Date**: 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**: An item of information that helps to identify a sample. It could be the organization's lab number, a patient ID/Chart ID/Medical Record Number, or another identifier for a sample.

**QA Event**: Any quality assurance issue that applies to the entire sample or an individual test is displayed in this column.
Changing Your Password

- Click **Change Password** on the Account menu and follow the designated steps.
- 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 letter (A-Z)
    - Lowercase letter (a-z)
    - Number (0-9)
    - Symbol (!, #, $, etc.)

Questions/Help

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