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ACCESSING THE CUSTOMER PORTAL

A. Access customer portal using one of the following internet browsers:
   a. Google Chrome (v. 22 - current)
   b. Mozilla Firefox (v. 31 – current)
   c. Microsoft Internet Explorer (v. 10 and 11)
   d. Microsoft Edge (v. 12-17)

B. Username field is case sensitive

C. Password
   a. Requirements
      i. At least 8 characters in length
      ii. Contain numbers, letters, and special characters
      iii. Must contain at least one upper and lower case letter
      iv. Passwords are required to be changed every 90 days.
   b. Resets
      i. “Forgot Your Password?” Link is your best option. This will generate an email (to the address on file) containing a link to reset the user’s password.
      ii. A Customer Portal Hospital Account Admin can also reset passwords, if needed. They can provide a temporary password if common email address was used to set up the account.
      iii. Contact your blood center for assistance, if needed.
   c. Locked Out –
      i. After three failed attempts you will be locked out, contact your local Hospital Account Admin for resets.

**Tip:** Do not get locked out. After the second failed attempt to access the system, use the “Forgot your password?” link to reset your password.
PROGRAM OVERVIEW

Header Descriptions:

A. Menu Icon – Accesses the menu.

B. Search Icon - Accesses an order search field.

C. Tutorial Toggle Button - Turns on and off pop-ups that will walk you through your order.

D. Layout Toggle Button – Changes color scheme.

E. User Information

F. “Create Order” - To start a new order or request.

G. Selecting “Export Table” will create an Excel spreadsheet, based on the current results shown. If you have not filtered the screen, it will create a report of all open orders or requests.

H. Selecting “Print” will print the results seen currently on the page.
**Orders**

**Order Search**

A. Hover the mouse over icons to display descriptions.

![Orders Search](image-url)

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Attributes</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Plasma</td>
<td>M Modifiers</td>
<td>Edit</td>
</tr>
<tr>
<td>8 Platelets</td>
<td>P Phenotypes</td>
<td>Edit (Inactivated)</td>
</tr>
<tr>
<td>2 Other</td>
<td>H HLA</td>
<td>Cancel</td>
</tr>
<tr>
<td>4 Red Blood Cells</td>
<td>C Comments</td>
<td>Cancel (Inactivated)</td>
</tr>
<tr>
<td></td>
<td>R Recipient</td>
<td>Order History</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Standing Order</td>
</tr>
</tbody>
</table>

# left of boxes is the total ordered
ORDER SEARCH (cont’d)

B. Status can be seen in the status column of the Order Search window or by selecting a specific order (as seen below). The status for each step updates from grey (not started) to yellow (in progress) and then to green (completed). Also, selecting “Order History” from this screen, can provide a detail history of the order, if needed.

Status Descriptions:

- **Submitted**: Hospital User submits the order.
- **Under Approval**: Order was successfully transmitted to the processing center.
- **Approved**: Processing center has acknowledged and approved the order.
- **Under Preparation**: Staff at the processing center are actively packing the shipment.
- **Order Filled**: The shipment is packed.
- **Delivered**: Hospital User has completed Product Reception.
- **Cancelled**: Order was cancelled by Hospital User.
- **Denied**: Order denied or partially denied by processing center.

**Tip**: Once the order has been approved, you will need to contact the blood center directly, if changes to the order or cancellations are needed.
ORDER SEARCH (cont’d)

C. Select Filter ( ) to conduct a search based on specific criteria.

D. Selecting “Print” will print the results seen currently on the page.

E. From the Order Search window, you can select “Create Order” to access the Ad Hoc Order function. See Ad Hoc Order’s section of this user guide for further instructions on placing orders.
AD HOC ORDER

1. Select “Ad Hoc Oder” from Menu.
2. Select the type of order you need to place.
   a. STAT: Not more than 1 hour from the time an order is received by the blood center to the time it is shipped.
   b. ASAP: Not more than 4 hours from the time an order is received by the blood center to the time it is shipped.
   c. Routine: Are stock orders that are shipped as workload and product availability permit, but not later than 24 hours from the time the order is received by the blood center.
   d. Scheduled: This selection allows for indications of a specific date and time, outside of the time requirements for ASAP or STAT orders.

NOTE: Time frames may vary by location, so contact your blood center for clarifications. They may also vary due to other factors (e.g., blood shortages, 3-day weekends, high usage).

3. Select a Family or Products to order
   a. Use the “Products” tab for components not listed in the “Family” tab, such as pooled cryo.
4. Enter the number of components needed for each blood type
   a. Blood types available will depend on family selected.
   b. NS = Not Specified
   c. Blood type equivalents maybe substituted by the blood center filling the order.

5. Select any Phenotypes/Modifiers/HLA options as needed.
   a. These options are available based on family/product being ordered.
6. Optional: Select “Add Product” to add additional component type to order.
7. Optional: Edit or delete entries.
8. Select “Proceed” when all components are requested.
**AD HOC ORDER (CONT’D)**

9. Optional: Enter comments (such as number of bags needed when selecting “Attach Extra Bags” as a modifier).

10. Optional: Select “Patient” to enter patient details.

11. Select Submit.

12. Pop-up window will display Order Number. Select “Ok” to return to home page.
**Delivery Schedule**

This function allows for a **View Only** look at what orders are scheduled for delivery for the selected time frame (today, this week, or this month). The data can be exported to Excel if needed.
SERVICES

SERVICES SEARCH

A. Hover the mouse over icons to display descriptions, as needed.

B. Select the Edit Request icon to print the request. This document will be your packing list, please include this document anytime you are shipping products or samples.

C. Status can be seen in the status column of the Services Search window.

D. Selecting “Request History” from this screen, will provide a detailed history of the order, if needed.

E. From the Services Search window, you can select “Create Request” to access the Service Request Menu. See specific service request’s sections of this user guide for associated directions on completing these activities.
PRODUCT RETURN

1. Complete this section.

2. Check this box to document your attestation of the statement.

3. Select Add Line.

4. Select Confirm, once all returns have been added.

5. Select Submit, if return request is complete.
PRODUCT RETURN (cont’d)

Include this printed copy of the return request page in your shipment. This will serve as your packing list for the shipment.

Important
CREDIT REQUEST

1. Complete this section.

2. Select Add Line.

3. Select Confirm, once all credit requests have been added.

4. Select Submit, if credit request is complete.
**HOSPITAL TO HOSPITAL TRANSFER**

**SENDING HOSPITAL**

1. Complete this section.

   - Organization: [Organizational Information]
   - Donation #: [Blood Component Information]
   - Product Code: [Code]

   - Add Comments here, as needed.

2. Check this box to document your attestation of the statement.

   - All blood components were stored and handled at our facility in accordance with current regulations.

3. Select Add Line.

4. Select Confirm, once all components have been added.

**RECEIVING HOSPITAL**

Complete Product Reception to complete transfer.

**Important**

**HOSPITAL TO HOSPITAL TRANSFER CANNOT BE USED FOR RESERVED BLOOD COMPONENTS (E.G. AUTOLOGOUS OR DIRECTED) OR HOSPITAL MODIFIED COMPONENTS.**
RECONCILIATION

PRODUCT RECEPTION

USING SHIPMENT NUMBER

1. Enter Shipment #

2. If shipment number was used, this field will open. Enter the number of components received with this shipment.

3. Select Add.
PRODUCT RECEPTION (cont’d)

Using Donation Number

1. Scan (or enter) Donation Number

4. Select Confirm, once all shipment/components have been received.
PRODUCT RECEPTION (CONT’D)

2. Scan (or enter) Product Code

3. Select Add

4. Select Confirm, once all components have been received.
STOCK

CURRENT STOCK OVERVIEW

This function provides a quick view of stock levels, based off the information entered last in “Enter Stock Info” function.
CURRENT STOCK DETAILS

The Current Stock Details screen shows all components that have been received in Product Reception.

This function can be filtered to assist with your search, as needed.
**ENTER STOCK INFO**

Entering Stock Information will overwrite the values seen in “Current Stock Overview”.

1. Select Family to enter.
2. Enter Quantities for each blood type.
3. Select “Add” to enter another product family.
4. Select “Proceed” if this is the last entry.

Select specific line above to activate Delete and Edit buttons, as needed.

Add another family by selecting “Add”.

Select “Register” to complete entry of stock levels.
**History of Upload**

This function provides a view into the completions of “Enter Stock Info” function, including who performed the entry, when it was done, and whether it was successfully captured. A search function is available at the top of the screen to narrow the information down as needed.
AFFILIATE HOSPITALS STOCK

AFFILIATES STOCK OVERVIEW
This screen shows stock levels for affiliated hospitals’ inventory.

AFFILIATES STOCK DETAILS
This screen lets you see the specific components in affiliated hospitals’ inventory.
USER MANAGEMENT

(Access only available to Customer Portal Hospital Account Administrators)

REQUIREMENTS

A. One person per login
   a. If person works at more than one organization, will need separate logins for each organization.
   b. Account must be inactivated within 24-48 hours if the person no longer requires access (i.e. no longer works for the organization or changes to a new position that no longer requires access to the program).

B. Username (6 characters in length) and is case sensitive.

C. Temporary password requirements
   a. At least 8 characters in length
   b. Contain numbers, letters, and special characters
   c. Must contain at least one upper and lower case letter

D. Can be a shared email address, if need be.

E. User profile descriptions
   a. Hospital lite user – provides view only security.
   b. Hospital user – provides access to orders, services, reconciliations, and stock.
   c. Hospital Account Admin – everything a hospital user can do, plus user management. Please contact your blood center for assistance in managing user accounts with this profile.
**PROCESS OF CREATING A NEW ACCOUNT**

1. Select “User Management” from menu.
2. Select “Create Account.”

![Create account](image1)

3. Enter required fields (all fields but password hint are required).

![Create account form](image2)

4. Select “Submit.”
5. Activate the user by locating them in the list and clicking “Inactive” OR they can use the email sent to them to activate their own account.

![User list](image3)
MODIFYING ACCOUNTS

A. Password – Reset passwords for individuals.
B. Status – change to “Inactive” when staff member no longer requires access (e.g. changes positions or leaves the organization).
C. Authorities – allows you to change the profile assigned to that individual account.