OVDL CoreOne Client Portal Guide

Using the CoreOne OVDL portal, you can:

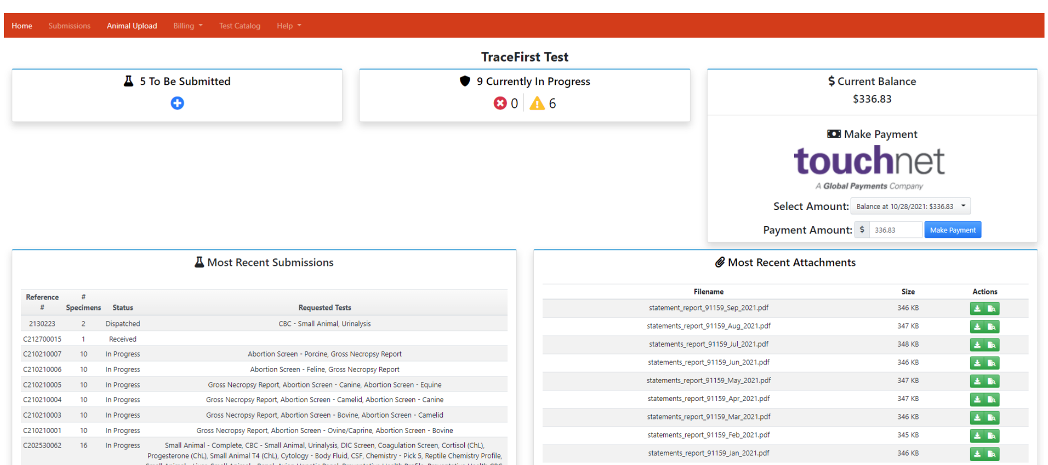
- Create submissions
- Upload the OVDL Microsoft® Excel spreadsheet template for bulk testing
- Check the progress of your submissions
- View finalized results and supplemental documents
- View and pay account charges

If you have an existing account with us, you will need to complete an Existing Client Account Update form. If you are new to OVDL, please complete our New Client Account Request Form. The business office will review and process your request. Once that process is complete, you will receive an email with instructions on how to log in.

Home Dashboard

Once logged in, the Home dashboard provides a bird's-eye view of your submissions, accounting details, and attachments. Here, you can view:

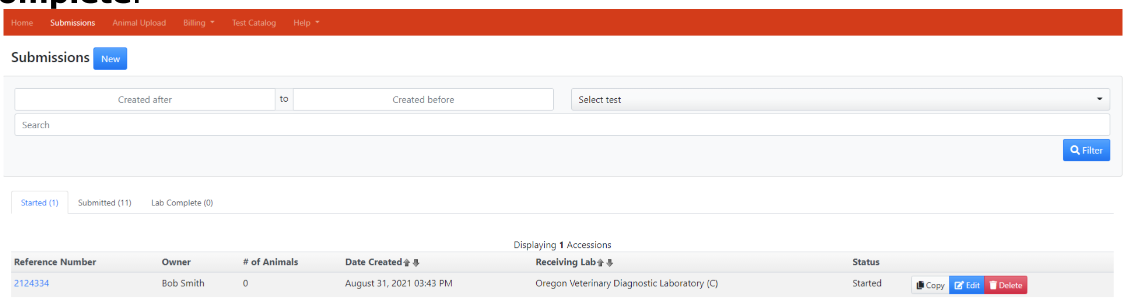
1. The top left tile displays the blue New icon to quickly create a new submission.
2. The top center tile displays any Rejected or On Hold submissions for easy management.
3. The top, right tile displays the Current Balance (if one exists), and provides the option to Make a Payment. If payments have been made in the last 7 days, they will appear here under Recent Payments.
4. The bottom left tile displays the Most Recent Submissions.
5. The bottom right tile displays the Most Recent Attachments, such as Final Monthly Statement PDF's, etc.



Submissions

To create or view current and past submissions, click on the “Submissions” tab toward the top of the screen in the orange banner.

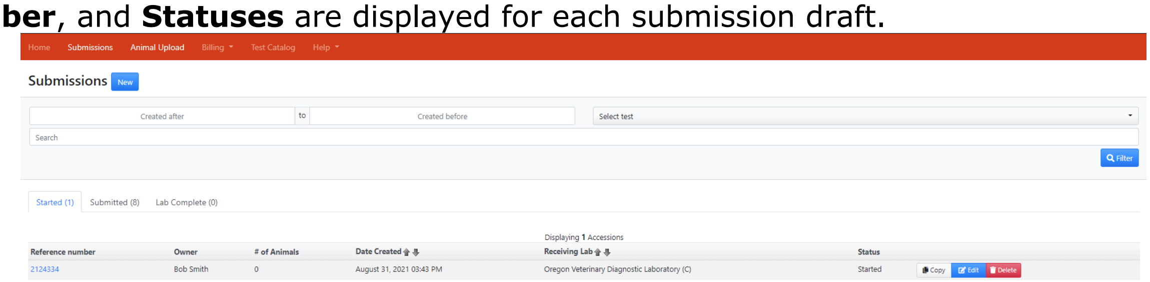
On the Submissions home screen, there are three tabs: **Started**, **Submitted**, and **Lab Complete**.



Started

The **Started** tab lists submissions that have been created, but not yet completed and submitted to the lab.

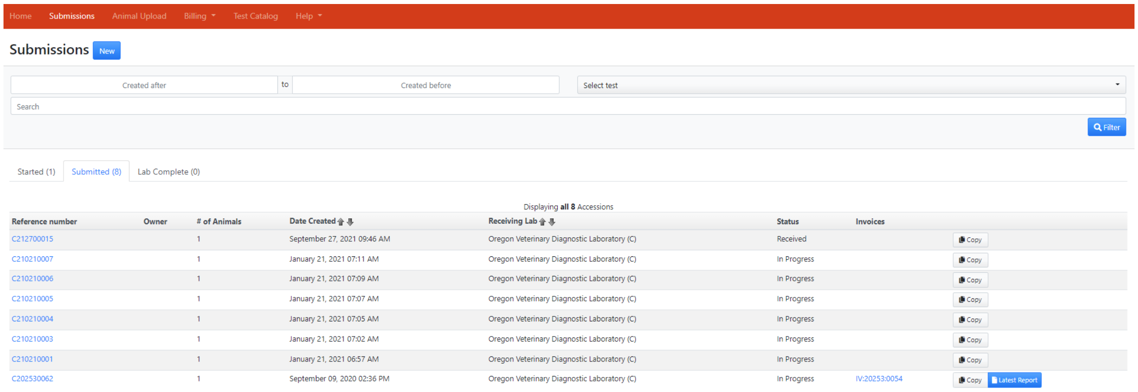
The **Reference Number**, **Date Created**, **Receiving Lab**, **Carrier Tracking Number**, and **Statuses** are displayed for each submission draft.



Submitted

The Submitted tab lists submissions that have been submitted to the lab.

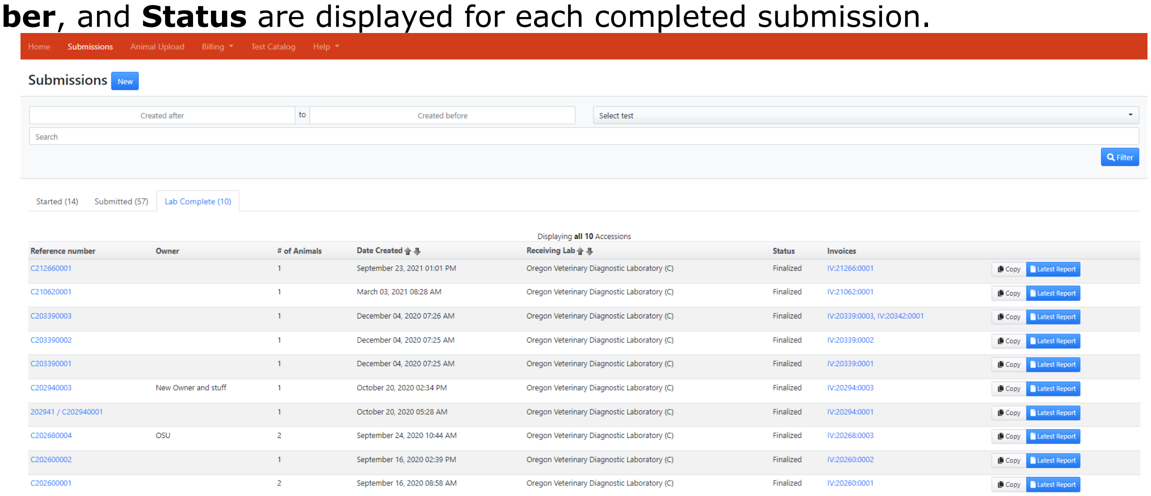
The **Reference Number, Date Created, Receiving Lab**, and **Status** are displayed for each submission.



Lab Complete

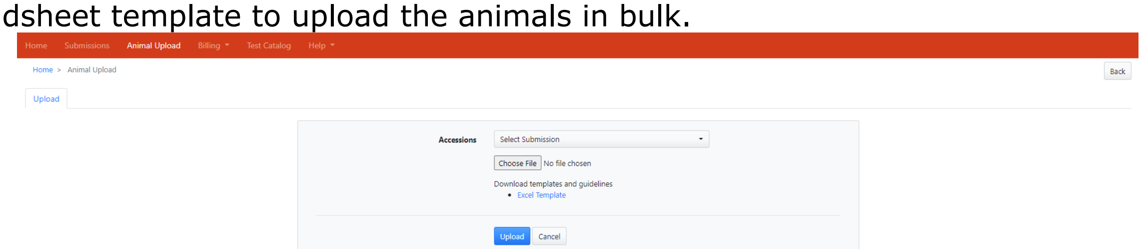
The **Lab Complete** tab lists submissions that have been completed by the lab.

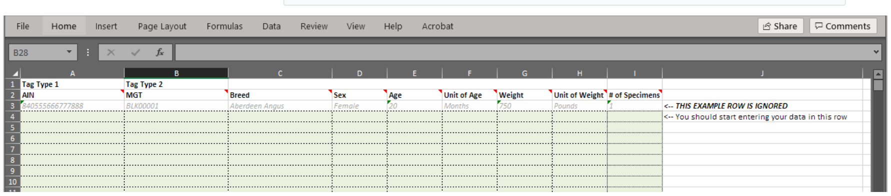
The **Reference Number, Date Created, Receiving Lab, Carrier Tracking Number**, and **Status** are displayed for each completed submission.



Animal Upload

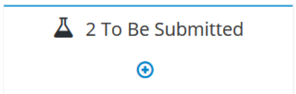
In Cases where many animals are included in a submission, users can download a spreadsheet template to upload the animals in bulk.





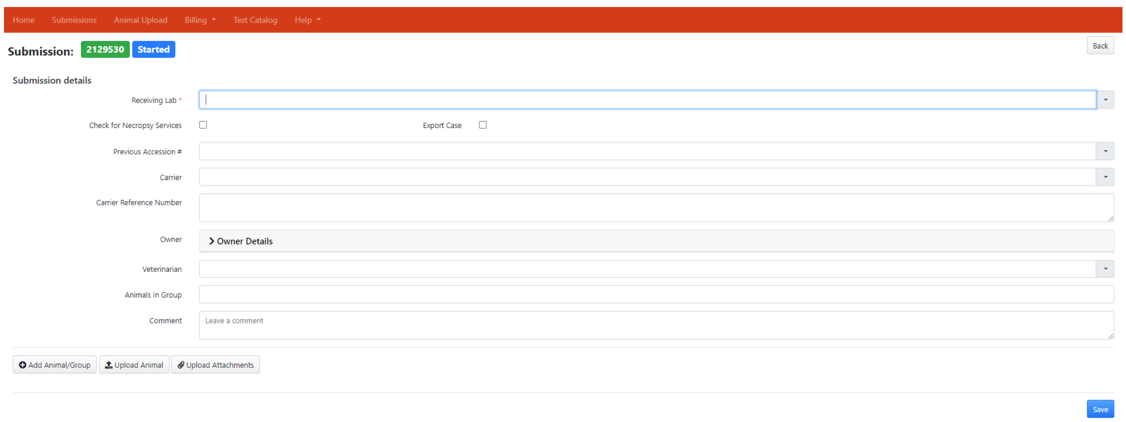
Creating a Submission

On the **Home** dashboard, click the blue **Add (plus sign)** icon. *(Or the blue **New** button on the **Submissions** tab.)*



Tip: *To copy details of an existing submission into a new submission, use the* **Duplicate** *icon on the* **Submissions** *page.*

Submission Details



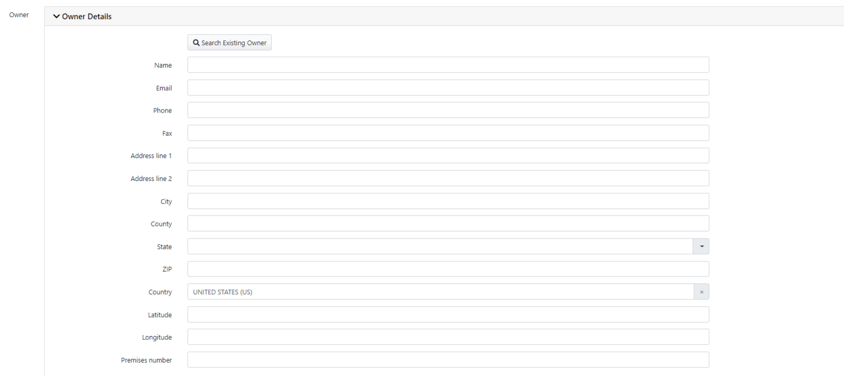
On the Submissions home screen, click on the "New" button in the top left corner to create a new submission. Throughout the submission process, you'll notice some fields have a red asterisk. This indicates a required field. You will not be able to complete your submission if any of the required fields are left blank.

When completing these fields, you have two options. The first option is to use the drop-down menu to select an item while the second item is to type in your selection. Each field is auto-populated, therefore only current menu items can be selected.

Through the submission process, if you are unsure of what option to select, please hand-write information on the submission form after it's been printed.

With all submissions, you'll need to start with the "Submission Details" block.

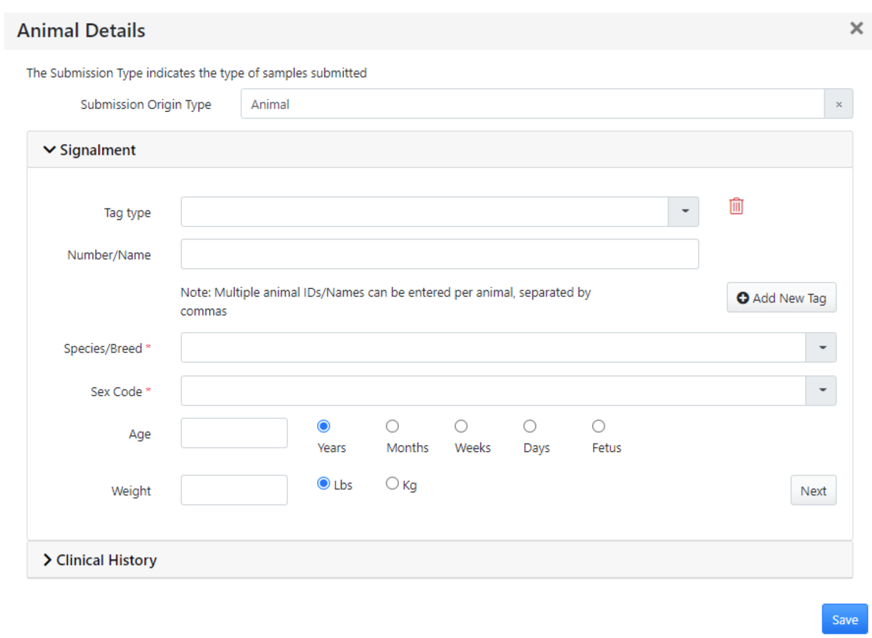
1. The first field indicates the location of Oregon Veterinary Diagnostic Laboratory.
2. In the next field you can check boxes to indicate whether necropsy services are needed or if you're submitting an export case.
3. The Previous accession field indicates if your current submission is in relation to a previous submission.
4. The next field indicates the mail carrier transporting the sample.
5. Carrier Reference Number.
6. The owner's details field can be used to enter information about the animal's owner.



Once entered, this information is saved and can be used again for future submissions.

7. The veterinarian who is submitting the sample.
8. The number of animals in the group
9. A comment box for any additional information.

Animal Details



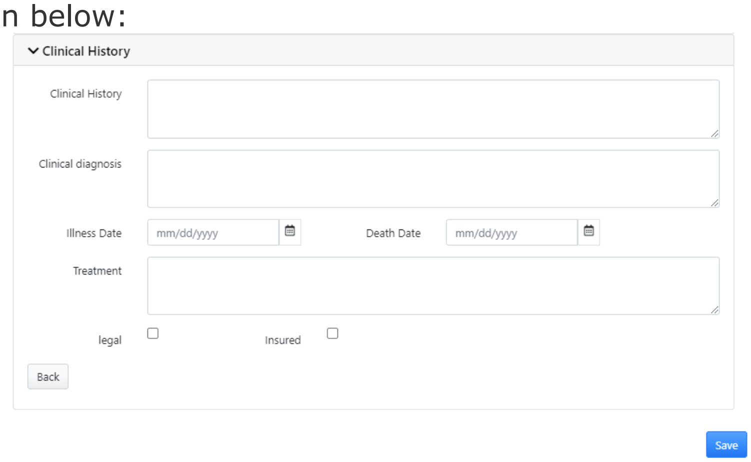
Here, the user can enter a variety of information depending on the selection of either Animal or Product for the **Submission Origin Type**:

- Animal
  - Tag Type
  - Number/Name for the animal or tag
  - Program
  - Sex code
  - Age
  - Weight
- Product
  - Tag Type
  - Number/Name
  - Weight

When adding a product, the **Program**, **Sex Code**, and **Age** fields will be greyed out as they are not needed.

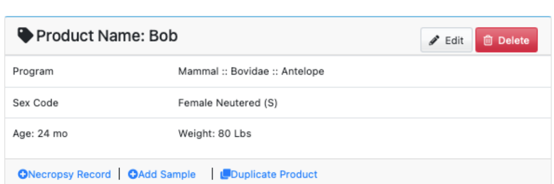
Clinical History

When selecting an animal, the user has the option to enter the animal's **Clinical History**, **Clinical Diagnosis**, and other details such as the **Illness Date** and **Death Date**, **Treatment**, and whether the animal is **Legal** and/or **Insured**. These options are available in an expandable modal below the Product/Animal information as seen below:



When finished adding animal details, click the blue **Save** button.

The product and its details will now be displayed at the bottom of the **Submission**.



Icons in the top right corner allow users to edit or delete details.

For individual animals, links along the bottom allow users to add a **Necropsy Record**, **Add Sample**, and/or **Duplicate Product**.

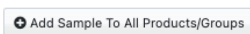
Duplicating animals will copy all details and tests to the new animal record.

***Tip:** For multiple animal accessions, add the animals first, then use the grey **Add Sample to All Products/Groups** and **Add Tests to All Products/Groups** buttons to add specimens and tests in bulk.*

Add Sample to All Groups/Products

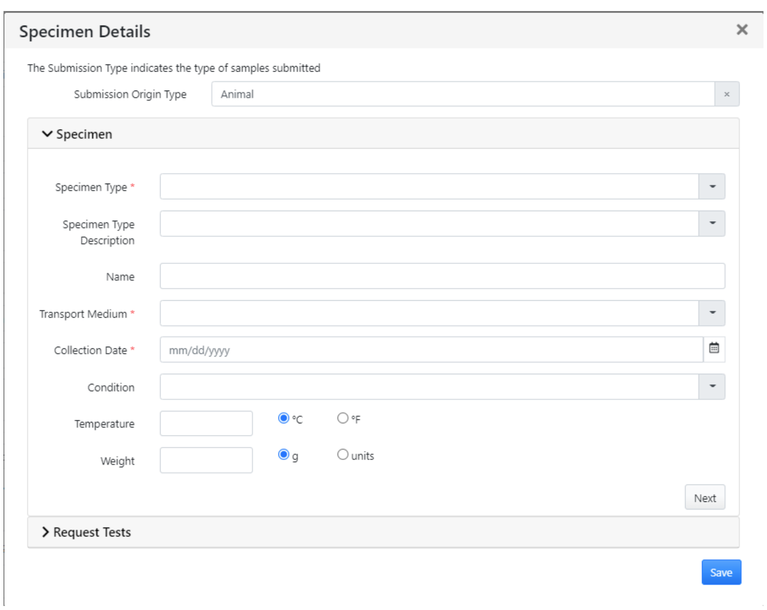
Once products have been added and their details have been saved, add the sample(s).

To add sample(s) to all products, click the grey **Add Samples to All Products/Groups** button.



The **Sample Details** window will be displayed.

Enter the **Specimen Type**, **Specimen Type Description** *(optional)*, **Name** *(optional)*, **Transport Medium**, **Collection Date**, **Condition** *(optional)*, **Temperature** *(optional)*, **Weight** *(optional)*.



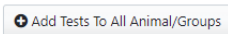
Click the blue **Save** button to complete the addition of the sample(s) to all products/groups.

The **Sample** will now appear along with the details for each product/group.

Add Tests to All Groups/Products

Once samples have been added, order the desired tests.

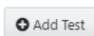
To order tests for all products, click the grey **Add Tests to All Products/Groups** button.



The **Request Tests** window will be displayed.

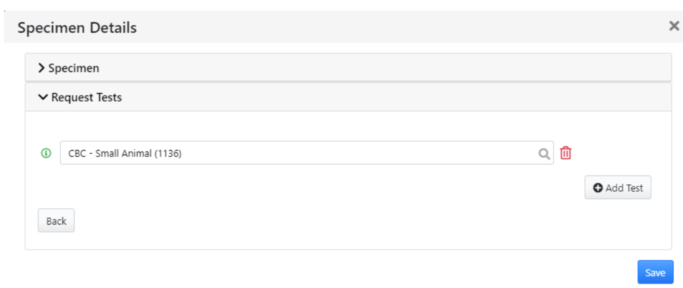
Search for and select the test to be added.

To add more than one test, use the grey **Add Test** button.

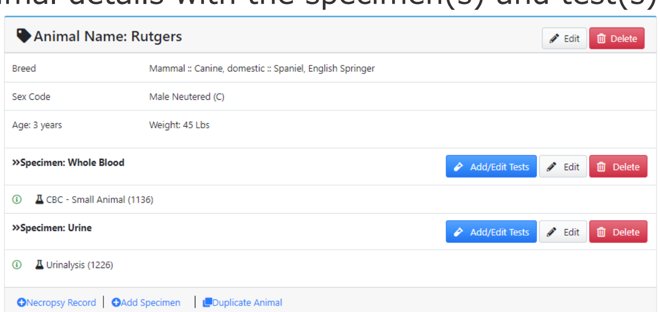


When all tests have been added, click the blue **Save** button.

The **Test(s)** will now appear below the specimen details for each product/group.

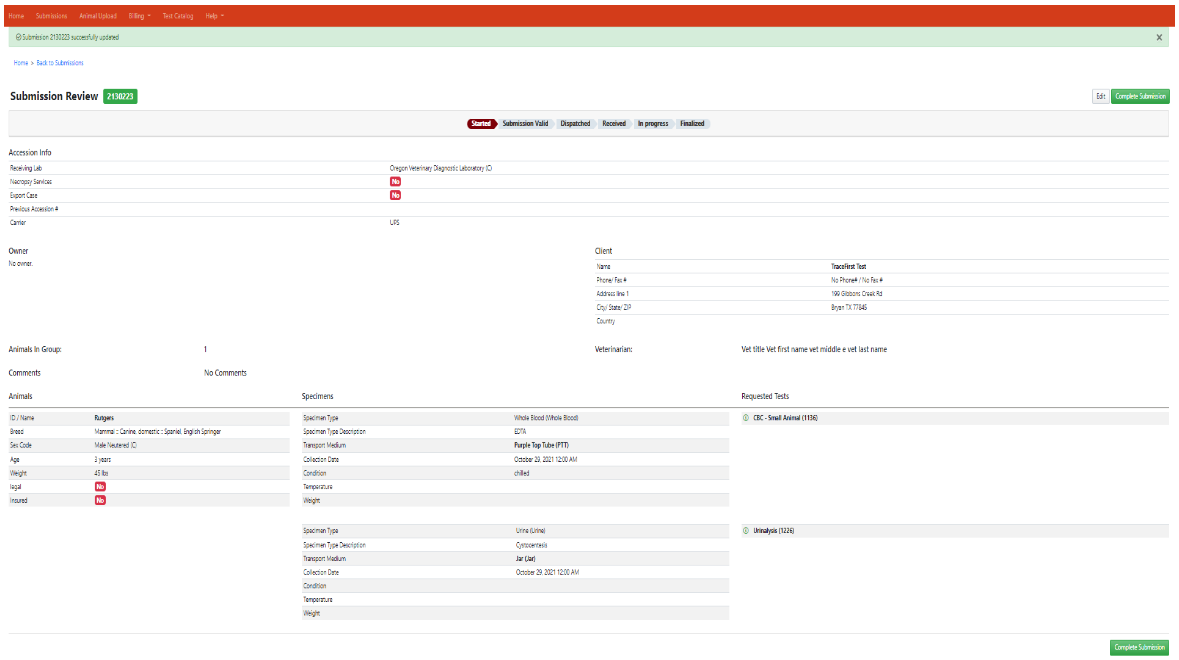


Once you click on the save button, the user will see a summary screen displaying the animal details with the specimen(s) and test(s) ordered.



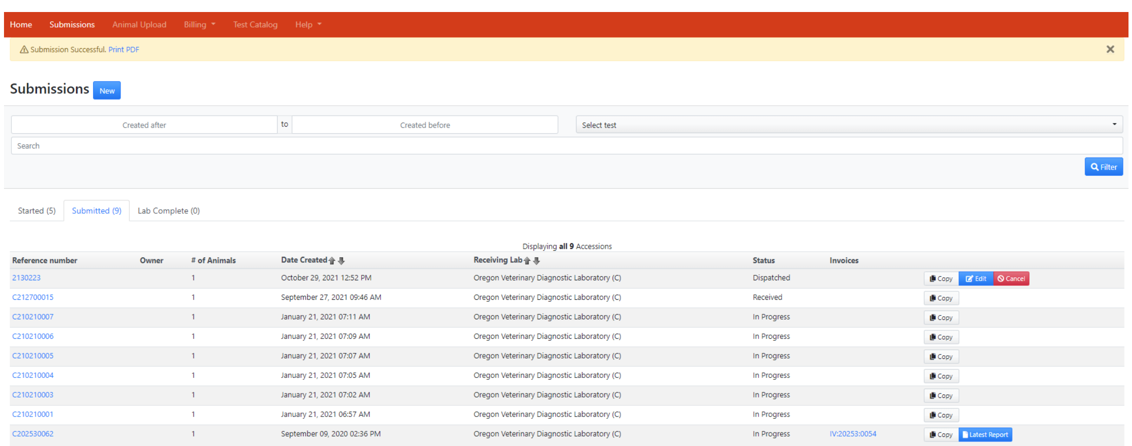
Complete the Submission

Once the details have been entered, and the samples and tests have been added, they will be displayed on the bottom. When data has been reviewed, click the blue save button in the lower right to display the **Submission Review** page.



If no changes are required, click the green **Complete Submission** button in the bottom right corner.

The submission will be sent to the lab and the user will be returned to the **Submitted** tab of the **Submissions** page.



Note: See the Announcement bar in yellow confirming the submission was successful and to print the PDF of the submission to send with the specimens.

The submission will be listed on the **Submitted** tab and can be monitored using the **View** icon in the right column.