



**Workforce**

# Using the Workforce Randomization Module

## **Randoms & Consortiums**

# Welcome to Workforce!

This training document will illustrate how to use Randoms and Consortiums in Workforce.

Section 1 will cover Stand-alone Random Testing Pools:

- [Creating a Stand-alone Random Pool](#)
- [Tests Performed for Missed Periods](#)
- [Adding a Roster to a Pool](#)
- [Running a Random Selection](#)
- [Order Random Tests](#)
- [Excuse from Random Selection](#)
- [Running an Excuse Report](#)
- [Cancel Random Run](#)
- [Closing the Program Interval](#)



Home

Password

[Forgot Password](#)

Access and use of this website is restricted to authorized users (who have agreed to be bound by all the terms, requirements and conditions in [FormFox's Website Access License](#)). Unauthorized users should exit immediately to avoid possible civil or criminal liability. Unauthorized access to this facility, copying or any other reproduction of materials from this system is prohibited.

ted Browsers :

© 2026, Clinical Reference Laboratory, Inc.  
V 3.23.0g

Need help? Email [workforcesupport@crlcorp.com](mailto:workforcesupport@crlcorp.com)  
Use | Pr

# Welcome to Workforce!

Section 2 will focus on Random Testing within a Consortium:

- [Creating a Consortium](#)
- [View and Edit Consortia](#)
- [Add Consortium Members](#)
- [Add a Roster to a Consortium](#)
- [Run Random Selection](#)
- [View Random Selection List](#)
- [Order Random Tests](#)
- [Excuse from Selection](#)
- [Cancel Random Run](#)
- [Re-run Random Selection](#)



Home

Password

[Forgot Password](#)

Access and use of this website is restricted to authorized users (who have agreed to be bound by all the terms, requirements and conditions in [FormFox's Website Access License](#)). Unauthorized users should exit immediately to avoid possible civil or criminal liability. Unauthorized access to this facility, copying or any other reproduction of materials from this system is prohibited.

ted Browsers :

© 2026, Clinical Reference Laboratory, Inc.  
V 3.23.0g

Need help? Email [workforcesupport@crlcorp.com](mailto:workforcesupport@crlcorp.com)  
Use | Pr



**Workforce**

# Creating A Stand-alone Random Pool

# Create Random Stand-alone Pool

## A Stand-alone pool can run random testing within a single company.

The pool can be set up by a Portal Admin and managed from the Portal or Company Admin level. Companies must already set up in Workforce. See the **Workforce Administration** guide for more information on adding companies in Workforce.

### First, navigate to the company portal.

Locate the **Portals** menu and search for the company's name. Click on the Company name. Once you are in the Company portal, you will see the portal name displayed in the top right corner.

The screenshot shows the 'Portals' dropdown menu with a search input containing 'demo'. The dropdown list includes the following items:

- Truck Demo
- Sales Demo
- WF2.0 Demo Account
- Team Demo Company
- Demo Company, Inc.** (highlighted)
- FF Support Demo Co...
- PJJ Demo Account
- Kims Demo Company

The main table below the dropdown shows a list of pools with columns: POOL NAME, POOL ID, INTERVAL, LAST SELECTION, LAST UPDATE, DATE READY TO RUN, and READY TO RUN. The 'READY TO RUN' column contains a refresh icon.

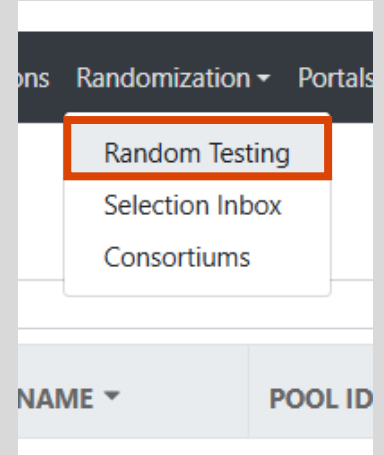
POOL NAME	POOL ID	INTERVAL	LAST SELECTION	LAST UPDATE	DATE READY TO RUN	READY TO RUN
110299 Prod	110299				11/20/2024	
104623 Prod	104623		WK47-24	11/20/2024		
KCPK NON-DOT	KCPK N		Nov-24			
108536 Prod	108536 P	Weekly	WK40-24			
PHSMA POOL	PHSMA	Monthly			09/16/2024	

The top right corner of the interface shows the user's account information: 'ABC TPA Services, Inc. Account'.

# Create Random Stand-alone Pool

## Locate the Randomization menu.

From the menu, select **Random Testing**. On the Random Testing page, select **Create New Pool**.



Home Randomization Portals Order Site Search Results Reports Administration Demo Company, Inc. Account

Pools Personnel

All Search CLEAR CREATE NEW POOL DOWNLOAD TEMPLATE EXPORT CSV

<input type="checkbox"/>	POOL NAME	POOL ID	SELECTION INTERVAL	LAST SELECTION	LAST UPDATE	DATE READY TO RUN	READY TO RUN
<input type="checkbox"/>	2024 Import Test	2024Import	Monthly	Nov-24	07/23/2024		
<input type="checkbox"/>	Walter test	66666	Quarterly	Q4-24	05/14/2024		
<input type="checkbox"/>	Kim Test456	test456	Quarterly				
<input type="checkbox"/>	Kim Test Pool 123	KTP123	Monthly	Nov-24	01/17/2024		
<input type="checkbox"/>	TestKD Pool	TestKD	Quarterly				
<input type="checkbox"/>	DemoCompA	DCOA	Quarterly	Q3-23	10/10/2023		

# Create Random Stand-alone Pool

Results Reports

### Create New Pool

Company \* Demo Company, Inc.

Pool Name \* TestDemo Pool

Pool ID \* TDPool

Federally Regulated \* Select

Selection Interval \* Select

Pool Calculation Type \* Select

Drug \*

Alcohol \*

Select your Lab \* Select

Panel \* Select

Pool Membership Type \* File Import

Pool Report ID Type \* SSN

WHO CAN RUN POOL  Company Administrator Only  Portal Administrator Only

CANCEL SUBMIT

Choose the **Pool Name** and **Pool ID**.

**Federally Regulated:** Yes or No? If Yes, select the appropriate **Regulatory Mode(s)**. Select as many as apply.

## Create Random Stand-alone Pool

The screenshot shows a 'Create New Pool' form with the following fields and values:

- Company \*: Demo Company, Inc.
- Pool Name \*: TestDemo Pool
- Pool ID \*: TDPool
- Federally Regulated \*: Yes
- Regulatory Mode(s) \*: FMCSA x
- Selection Interval \*: Quarterly
- Pool Calculation Type \*: Select (dropdown menu is open showing options: Select, Annual Percentage, Fixed Number of Selections for Program Year)
- Drug \*: (empty)
- Alcohol \*: (empty)
- Select your Lab \*: Select
- Panel \*: Select
- Pool Membership Type \*: File Import
- Pool Report ID Type \*: SSN

WHO CAN RUN POOL

- Company Administrator Only
- Portal Administrator Only

**Selection Interval:** How often will a testing pool be run? Monthly and Quarterly are the most common.

**Pool Calculation Type:**

**Annual Percentage:** A chosen percentage of pool members will be tested each year.

**Fixed Number of Selections for Program Year:** A specific number of pool members will be tested each year.

# Create Random Stand-alone Pool

**Create New Pool** [X]

Company \* Demo Company, Inc.

Pool Name \* TestDemo Pool

Pool ID \* TDPool

Federally Regulated \* Yes

Regulatory Mode(s) \* FMCSA x

Selection Interval \* Quarterly

Pool Calculation Type \* Annual Percentage

Drug \* 55 %

Alcohol \* 15 %

Select your Lab \* Select

Panel \* Select

Pool Membership Type \* File Import

Pool Report ID Type \* SSN

WHO CAN RUN POOL  Company Administrator  Portal Administrator Only

**Choose Percentage or Number of Tests Per Year:**

**Drug:** In this example, 55% of pool members will be drug tested each year.

**Alcohol:** In this example, 15% of pool members will be alcohol tested each year.

## Create Random Stand-alone Pool

Reports ▾

### Create New Pool ✕

Company \* Demo Company, Inc.

Pool Name \* TestDemo Pool

Pool ID \* TDPool

Federally Regulated \* Yes ▾

Regulatory Mode(s) \* FMCSA ✕

Selection Interval \* Quarterly ▾

Pool Calculation Type \* Annual Percentage ▾

Drug \* 55 %

Alcohol \* 15 %

Select your Lab \* Select ▾

Panel \* Select

Pool Membership Type \* CRL/CRL.FFOX.DOTTEST-Undefined

Pool Report ID Type \* CRL/CRL.SALV.REF1-Undefined

WHO CAN RUN POOL CRL/P3T.CHM1.REF1-Undefined

CRL/QZZ.CHEM.REF1-Undefined

CRL/QZZ.CHM1.REF1-Undefined

CRL/QZZ.DOT1.REF1-Undefined

CRL/QZZ.FFP1.REF1-Undefined

CRL/QZZ.NON1.REF1-Undefined

CRL/QZZ.SAL1.REF1-Undefined

The difference in setting up a standalone company-specific pool and a Consortium is that you must select a lab account that will be associated.

# Create Random Stand-alone Pool

Company \* Demo Company, Inc.

Pool Name \* TestDemo Pool

Pool ID \* TDPool

Federally Regulated \* Yes

Regulatory Mode(s): \* FMCSA x

Selection Interval \* Quarterly

Pool Calculation Type \* Annual Percentage

Drug \* 55 %

Alcohol \* 15 %

Select your Lab \* CRL/QZZ.DOT1.REF1-Undefined

Panel \* W215/FEDERAL

Pool Membership Type \* File Import

Pool Report ID Type \* SSN

WHO CAN RUN POOL  Company Administrator Only  Portal Administrator Only

CANCEL SUBMIT

Specify the **Panel** that will be used, the **Pool Membership Type** and **Pool Report ID Type**.

**Pool Membership Type:** How will pool members be added?

**File Import:** Add members from an imported roster list.

**Criteria:** Pool members are added from existing personnel files in the system based on criteria.

# Create Random Stand-alone Pool

Company \* Demo Company, Inc.

Pool Name \* TestDemo Pool

Pool ID \* TDPool

Federally Regulated \* Yes

Regulatory Mode(s) \* FMCSA x

Selection Interval \* Quarterly

Pool Calculation Type \* Annual Percentage

Drug \* 55 %

Alcohol \* 15 %

Select your Lab \* CRL/QZZ.DOT1.REF1-Undefined

Panel \* W215/FEDERAL

Pool Membership Type \* File Import

Pool Report ID Type \* SSN

WHO CAN RUN POOL  Company Administrator Only  Portal Administrator Only

CANCEL SUBMIT

Choose the **Pool Report ID Type**.

**Pool Report ID Type:** What type of ID number will be used for pool members?

Click **Submit** once selections have been made.

## View Random Pool

Now that the pool has been set up, you can view it on the **Random Testing** page.

Click on the Pool Name to see the Pool details or to make any changes or work with the new pool.

ons Randomization Portals

Random Testing

Selection Inbox

Consortiums

NAME

POOL ID



Successful Creation of Randoms

Home Randomization Portals Order Site Search Results Reports Administration

Demo Company, Inc. Account

Pools Personnel

All Search



CLEAR

CREATE NEW POOL

DOWNLOAD TEMPLATE

EXPORT CSV

<input type="checkbox"/>	POOL NAME	POOL ID	SELECTION INTERVAL	LAST SELECTION	LAST UPDATE	DATE READY TO RUN	READY TO RUN
<input type="checkbox"/>	TestDemo Pool	TDPool	Quarterly			11/21/2024	
<input type="checkbox"/>	2024 Import Test	2024Import	Monthly	Nov-24	07/23/2024		
<input type="checkbox"/>	Walter test	66666	Quarterly	Q4-24	05/14/2024		
<input type="checkbox"/>	Kim Test456	test456	Quarterly				

## Tests Performed for Missed Periods

### Click General Information to see pool details.

Note, after creation and prior to the first selection being done, administrators have the ability to add tests performed for missed periods. Click **Total tests performed for missed periods** and make the appropriate selections.

**POOL DETAILS**

**TESTDEMO POOL (TDPool)**

STATISTICS HISTORY **GENERAL INFORMATION** POOL MEMBERS RUN RANDOM PERSONNEL IMPORT CLOSE PROGRAM INTERVAL

**MODIFY POOL CONFIGURATION**

COMPANY Demo Company, Inc.  
POOL NAME TestDemo Pool

[Total tests performed for missed periods](#)

**Missing Periods**

If one or more periods have been missed for this pool group. Please choose one of the following options.

- Allow Workforce to make up required tests for missed periods.
- Enter total number of tests already performed for the missed periods for this pool group.

Total # of drug tests completed \*

Total # of alcohol tests completed \*

Average pool size during the missed periods \*

When choosing this option the total number of tests and average pool size should be entered prior to running the first random selection. These values are necessary for RedArrow to calculate the proper number of selections and provide accurate statistics. If the actual numbers are unknown, then estimated values should be entered when creating the pool. The pool detail form provides a link ("Total tests performed for missed periods") so that these values can be updated later.

CANCEL SAVE

OZZ.DOT1.BEE1

## Add Roster to Pool

Click **Personnel Import** to add members to the Pool.

Click **Choose File** to upload a CSV file of Pool Members. The CSV roster should include First Name, Last Name, ID, Regulatory Mode, and Employee Category.  
Click **Next**.

**POOL DETAILS** [Close]

**TESTDEMO POOL (TDPool)**

STATISTICS HISTORY GENERAL INFORMATION POOL MEMBERS RUN RANDOM **PERSONNEL IMPORT** CLOSE PROGRAM INTERVAL

**UPLOAD FILE**

Company: Demo Company, Inc.

Import CSV File

Upload file: **Choose File** No file chosen

File has header row

RESET NEXT

## Map CSV columns to fields.

Use the drop-down arrow next to each column header to map each to a field. Required information must be mapped to a column. Skip any columns you do not wish to import. Once imported, members can be viewed under the **Pool Members** tab.

### POOL DETAILS ×

TESTDEMO POOL (TDPool)

[STATISTICS](#)
[HISTORY](#)
[GENERAL INFORMATION](#)
[POOL MEMBERS](#)
[RUN RANDOM](#)
[PERSONNEL IMPORT](#)
[CLOSE PROGRAM INTERVAL](#)

**FIELD MAPPINGS FOR: Demo Company, Inc.**

Company Primary ID Type: EmployerID      Pool Primary ID Type: SSN

Skipped Field	Skipped Field	Skipped Field	Skipped Field	Skipped Field	Skipped Field	Skipped Field	Skipped Field	Skipped Field
Map Field #1	EID	Mode	Category	MANAGER				
Set this field as skipped	TESTER	Amy	7773		FTA	V/E MAINT	CRL QA	
<b>Required</b>	TESTER	Alcario	4822	MANAGER	FTA	V/E MAINT	CRL QA	
First Name	TESTER	Alex	2950		FTA	V/E MAINT	CRL QA	
Last Name	TESTER	Carl	5793		FTA	V/E MAINT	CRL QA	
SSN	TESTER	Farrell	5167		FTA	V/E MAINT	CRL QA	
Regulatory Mode	TESTER	Marcos	3802		FTA	V/E MAINT	CRL QA	
Employee Category	TESTER	Jeff	7559	MANAGER	FTA	VEH OPER	CRL QA	
<b>IDFields</b>	TESTER	Rodale	9884		FTA	VEH OPER	CRL QA	
Alt ID	TESTER	Jack	1601		FTA	VEH OPER	CRL QA	
Driver License	TESTER	Roy	2066		FTA	VEH OPER	CRL QA	
Employer ID	TESTER	William	4654		FTA	VEH OPER	CRL QA	
<b>Other</b>	TESTER	Delia	4928	MANAGER	FTA	VEH OPER	CRL QA	
Company Code	TESTER	Logan	4862		FTA	VEH CNTRL	CRL QA	
Driver License State of Issuance								
Address Line 1								
Address Line 2								

## Check for errors.

After all columns have been mapped, click **Submit for Validation**. Any fields with an error or required fields unmapped will return an error. Click **Back**, correct the mapping, and **Submit for Validation** again.

TESTER75	TESTER75	75	FOXU00822	FMCSA	DRIVER		OCCUPATION 75	KIM
TESTER76	TESTER76	76	22334455	FMCSA	DRIVER		OCCUPATION 76	KIM
TESTER77	TESTER77	77	FOXU00836	FMCSA	DRIVER		OCCUPATION 77	KIM
TESTER78	TESTER78	78	FOXU00836	FMCSA	DRIVER	MANAGER	OCCUPATION 78	KIM

BACK SUBMIT FOR VALIDATION

**IMPORT FILE VALIDATION FOR:**

Import file validation: (78 of 78 have errors)

Line #	Validation errors and warnings	Last Name	First Name	Alt ID	Regulatory Mode	Employee Category	Manager
2	<b>Errors:</b> Field 'Company Code': Company Code is empty;	TESTER1	TESTER1	1	FMCSA	DRIVER	
3	<b>Errors:</b> Field 'Company Code': Company Code is empty;	TESTER2	TESTER2	2	FMCSA	DRIVER	
4	<b>Errors:</b> Field 'Company Code': Company Code is empty;	TESTER3	TESTER3	3	FMCSA	DRIVER	MANAGER
5	<b>Errors:</b> Field 'Company Code': Company Code is empty;	TESTER4	TESTER4	4	FMCSA	DRIVER	MANAGER

### Confirm the records import.


Once the import is error-free, click **Import**. Click **Confirm** to finalize the Roster Import. The system may take a minute to process the import. You will see a green success message once the Records import.

**IMPORT FILE VALIDATION FOR:**  
Import file validation: (0 of 78 have errors)


Consortium 2025	2025	Monthly	12/18/2024
Kim Test Consortium	testum1	Quarterly	11/21/2024
Roach Consortium	ROACON	Monthly	09/18/2024
100524 Prod	100504P	Weekly	
test consorti	tc2024	Quarterly	04/09/2024

BACK CANCEL **IMPORT**

**IMPORT CONFIRMATION** x

 You are about to submit 78 of 78 records for import. You will receive a message once the process is complete.

CANCEL **CONFIRM**

 Records imported successfully.

**Pool History can be viewed from the Pool Details Page.**

From the **Pool Details** page, select the **History** tab. Data from the current year will be listed under Testing Period Breakdown. Click the drop-down arrow to view data for previous years.

### POOL DETAILS ✕

**2024 IMPORT TEST (2024Import)**

STATISTICS
**HISTORY**
GENERAL INFORMATION
POOL MEMBERS
RUN RANDOM
PERSONNEL IMPORT
CLOSE PROGRAM INTERVAL

PROGRAM YEAR: 2024 PROGRAM START DATE: 01/01/2024 PROGRAM END DATE: 12/31/2024

2024

#### TESTING PERIOD BREAKDOWN

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED		EXTRA TESTS		TESTS PEND COLL		TESTS INCMPL		TESTS COMPLETED	
			DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL
Jul-24	1	07/23/2024	1	1	0	0	1	1	0	0	0	0
Nov-24	1	11/12/2024	1	1	0	0	1	1	0	0	0	0

#### TESTING TOTALS

PROGRAM YEAR-TO-DATE:	TOTAL # TESTS REQUIRED: 2
	TOTAL ESTIMATED COMPLETE: 0
	DIFFERENCE: 2
TARGET DRUG: 20%	TARGET ALCOHOL: 15%
ACTUAL DRUG: 0	ACTUAL ALCOHOL: 0

DemoCompA
DCOA
Quarterly
Q3-23
10/10/2023

# Run Random Selection

Under Pool Details, locate the Run Random tab.

Tests Required for Selection will be automatically calculated based on the percentages used to set up the pool. Administrators can increase the selection by editing the Actual to Select number. Click Run Selection.

**POOL DETAILS**

2024 IMPORT TEST (2024Import)

STATISTICS HISTORY GENERAL INFORMATION POOL MEMBERS **RUN RANDOM** PERSONNEL IMPORT CLOSE PROGRAM INTERVAL

User not Authorized to run randoms for this pool.

**TESTS REQUIRED FOR SELECTION**

DRUG	1	ACTUAL TO SELECT	<input type="text" value="1"/>
ALCOHOL	1	ACTUAL TO SELECT	<input type="text" value="1"/>

To skip any period, enter zero for Actual To Select  
Running selection for period Dec-24

**RUN SELECTION**

Kim Test Pool 123 KIP123 Monthly Nov-24 01/17/2024

# Run Random Selection

## Export the Random Selection List.

Once the random selection has been made, you can print or export the selection list. You can also print notification letters for individual employees.

**POOL DETAILS** (2024 Import Test)

STATISTICS | HISTORY | GENERAL INFORMATION | POOL MEMBERS | RUN RANDOM | PERSONNEL IMPORT | CLOSE PROGRAM INTERVAL

Run Excused Report

**TESTING PERIOD BREAKDOWN**

PERIOD	POOL SIZE
Nov-24	1
Jul-24	1

**TESTING TOTALS**

CURRENT POOL AVERAGE POOL SIZE

TOTAL TESTS COMPLETED: 0

TOTAL TESTS PENDING COLLECTION: 2 (DRUG), 2 (ALCOHOL)

**RANDOM SELECTION LIST**

2024 Import Test

11/01/2024 - 11/30/2024

COMPANY	PRIMARY ID	NAME	SELECTION DATE	TEST FOR	COMPLETED DATE
Demo Company, Inc. (0888976755)	660606660	Parr, Catherine	11/12/2024 20:12	D,A	

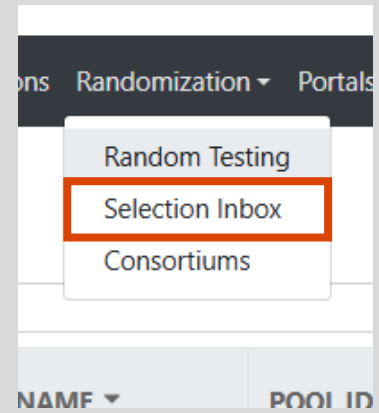
EXPORT | PRINT | PRINT NOTIFICATION LETTERS

CLOSE

## View Selection Inbox

After a selection has been made, everything can be managed from the **Selection Inbox**.

From the Randomization menu, click **Selection Inbox**. The Selection Inbox will have the status and information for each individual selected in the random run.



Home Result Exceptions 1 Randomization Portals Order Site Search Results Reports Administration Example Company Inc Account

Select Search CLEAR CUSTOMIZE EXPORT CSV CLEAR FILTERS

STATUS	PERSONNEL ID	NAME	SERVICE	POOL	SELECTION	COMPANY	REGULATED	CREATED	NOTIFIED	AUTHORIZATION ID	SITE	REGULATORY MODE	EMPLOYEE CATEGORY
PENDING	*****1111	Tester, Tom	Lab Based Urine Test	121187CQ	Q2-26	Example Company Inc	TRUE	04/15/2026				FAA	Aviation Screener
			Alcohol Breath Test	121187CQ	Q2-26	Example Company Inc	TRUE	04/15/2026				FAA	Aviation Screener

Total records: 2

# Order Random Test

Orders can be started from the Selection Inbox.  
From the **Selection Inbox**, locate the employee and click on the **Status**.

Home Result Exceptions 1 Randomization Portals Order Site Search Results Reports Administration Example Company Inc Account

Select Search CLEAR CUSTOMIZE EXPORT CSV CLEAR FILTERS

STATUS	PERSONNEL ID	NAME	SERVICE	POOL	SELECTION	COMPANY	REGULATED	CREATED	NOTIFIED	AUTHORIZATION ID	SITE	REGULATORY MODE	EMPLOYEE CATEGORY
PENDING	*****1111	Tester, Tom	Lab Based Urine Test	121187CQ	Q2-26	Example Company Inc	TRUE	04/15/2026				FAA	Aviation Screener
			Alcohol Breath Test	121187CQ	Q2-26	Example Company Inc	TRUE	04/15/2026				FAA	Aviation Screener

Total records: 2

An order form will open and you will proceed with ordering the test as usual. After the order is placed, the status will change to **Ordered**.

Home Result Exceptions 1 Randomization Portals Order Site Search Results Reports

Select Search

STATUS	PERSONNEL ID	NAME	SERVICE	POOL	SELECTION	CO
ORDERED [Set to PENDING]	*****1111	Tester, Tom	Lab Based Urine Test	121187CQ	Q2-26	Exa Con
			Alcohol Breath Test	121187CQ	Q2-26	Exa Con

Total records: 2

Home Result Exceptions 1 Randomization Portals Order Site Search Results Reports Administration

### ORDER FORM

1 2 3

Do you want to order for?  
 An Individual

COMPANY  
Example Company Inc

LOCATION  
Enter the Location name

REASON \*  
Random

PLEASE SELECT SERVICES:  
DRUG TEST +

LAB ACCOUNT \*  
CRL/QZZ.DOT1.REF1-Undefined

REGULATED TESTING (DOT) (Urine)  
 REGULATED TESTING (DOT) (Oral)  
 NON-REGULATED DRUG TESTING (Urine)  
 NON-REGULATED DRUG TESTING (Oral)  
 POINT OF CARE TESTING (POCT)  
 FLU TESTING (FLU)

# Excuse From Selection

If you need to excuse an individual, you can do so in the Selection Inbox. From the Selection Inbox, find the employee and click on the Created Date. If the test has already been ordered, first click **Set to Pending** under the Status.

ORDERED  
[Set to PENDING]

Home Result Exceptions Randomization Portals Order Site Search Results Reports Administration Example Company Inc Account

Select Search CLEAR CUSTOMIZE EXPORT CSV CLEAR FILTERS

STATUS	PERSONNEL ID	NAME	SERVICE	POOL	SELECTION	COMPANY	REGULATED	CREATED	NOTIFIED	AUTHORIZATION ID	SITE	REGULATORY MODE	EMPLOYEE CATEGORY
PENDING	*****1111	Tester, Tom	Lab Based Urine Test	121187CQ	Q2-26	Example Company Inc	TRUE	04/15/2026				FAA	Aviation Screener
			Alcohol Breath Test	121187CQ	Q2-26	Example Company Inc	TRUE	04/15/2026				FAA	Aviation Screener

Use the dialog box to either Excuse and choose an alternate or simply Excuse the donor. Select the reason from the dropdown. If necessary, comment on the reason. If you choose to alternate, a new person will be selected and both will be reflected in the Selection Inbox.

STATUS	PERSONNEL ID
EXCUSED	*****1111
PENDING ALT	*****zd1

### EXCUSE EVENTS

You have selected to excuse Tom Tester from taking a pending Lab Based Urine Test. Doing so will remove this event from being tested for the associated pool and will affect the minimum required events to be completed for this selection period. You are required to provide reason for excusal.

You have the option to excuse the donor from testing or excusing the donor and selecting an alternate donor from the current selection period.

Clicking "Excuse" will mark the scheduling event status as "Excused", will add the comments to the scheduling notes and will remove the event from the Random Selection Inbox grid. Excused events can be filtered from the Results grid.

Clicking "Excuse + Alternate" will excuse the current donor (same as above) and add an alternate donor to the Inbox grid with a status of "Pending ALT". Alternates can be scheduled for testing in the same way as "Pending".

Please note that alternates will be created with same event types as the excused record. (i.e. If a drug and alcohol were excused, then a drug and alcohol will be created for the alternate donor.)

EXCUSE + ALTERNATE
  EXCUSE

Unavailable to Test/Other

Comment (required) \*

CANCEL EXCUSE + ALTERNATE EXCUSE

# Run Excused Report

For auditing purposes, you can run an Excused Report.

From the **Pool Details** page, select the **Statistics** tab. Click **Run Excused Report** from the top, just above **Testing Period Breakdown**.

**POOL DETAILS** ×

2024 IMPORT TEST (2024Import)

**STATISTICS** HISTORY GENERAL INFORMATION POOL MEMBERS RUN RANDOM PERSONNEL IMPORT CLOSE PROGRAM INTERVAL

[Run Excused Report](#)

**TESTING PERIOD BREAKDOWN**

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED		EXTRA TESTS		TESTS COMPLETED		STATUS	ACTION
			DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL		
Nov-24	1	11/12/2024	1	1	0	0	0	0		✕ Cancel
Jul-24	1	07/23/2024	1	1	0	0	0	0		

**TESTING TOTALS**

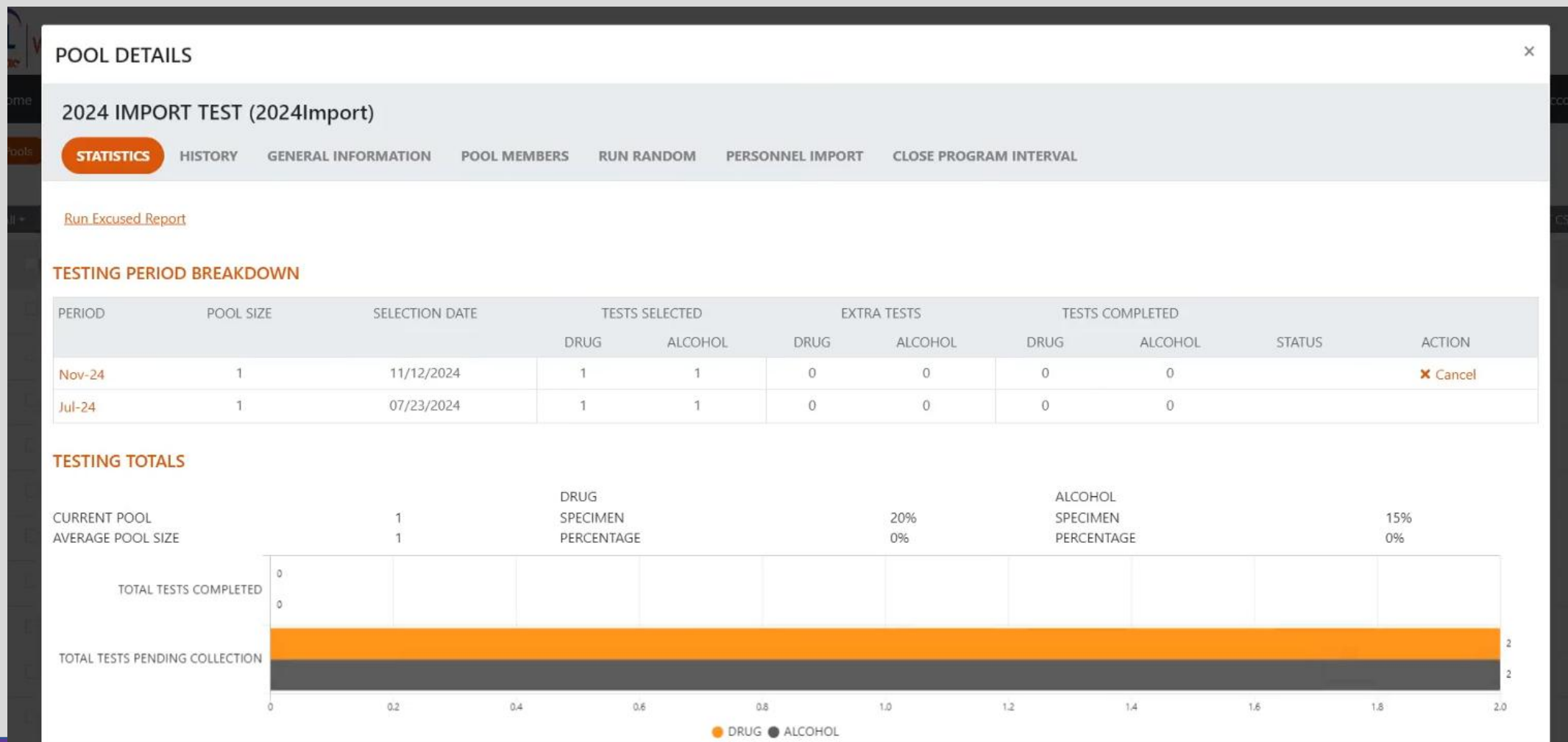
CURRENT POOL	1	DRUG SPECIMEN PERCENTAGE	20%	ALCOHOL SPECIMEN PERCENTAGE	15%
AVERAGE POOL SIZE	1	DRUG SPECIMEN PERCENTAGE	0%	ALCOHOL SPECIMEN PERCENTAGE	0%

TOTAL TESTS COMPLETED: 0

TOTAL TESTS PENDING COLLECTION: 2 (DRUG), 2 (ALCOHOL)

As testing is completed, the pool statistics will be updated.

From the **Pool Details** page, select the **Statistics** tab.



# Cancel Random Run

Admins can cancel a random selection that has not been ordered.

From the **Pool Details** page, select the **Statistics** tab. Click **Cancel** next to the appropriate period. Once canceled, you have the option to **Re-Run** the selection later.

The screenshot displays the 'POOL DETAILS' interface for the '2024 IMPORT TEST (2024Import)'. The 'STATISTICS' tab is selected, showing a 'TESTING PERIOD BREAKDOWN' table and 'TESTING TOTALS'.

**TESTING PERIOD BREAKDOWN**

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED		EXTRA TESTS		TESTS COMPLETED		STATUS	ACTION
			DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL		
Nov-24	1	11/12/2024	1	1	0	0	0	0		✕ Cancel
Jul-24	1	07/23/2024	1	1	0	0	0	0		

**TESTING TOTALS**

Metric	Value	DRUG SPECIMEN PERCENTAGE	ALCOHOL SPECIMEN PERCENTAGE
CURRENT POOL	1	20%	15%
AVERAGE POOL SIZE	1	0%	0%

**TOTAL TESTS COMPLETED**

**TOTAL TESTS PENDING COLLECTION**

Legend: ● DRUG ● ALCOHOL

**CANCEL CONFIRMATION**

**You are about to cancel an active Selection.**

This cannot be undone. Are you sure you want to proceed?

# Close Program Interval

Upon completion of testing for the calendar year, the program interval should be closed.

From the **Pool Details** page, select the **Close Program Interval** tab. Confirm the information and click **Verify**. The current year interval will be closed and a new interval for the following year will be created.

**POOL DETAILS** [Close]

2024 IMPORT TEST (2024Import)

**STATISTICS** HISTORY GENERAL INFORMATION POOL MEMBERS RUN RANDOM PERSONNEL IMPORT **CLOSE PROGRAM INTERVAL**

[Run Excused Report](#)

**TESTING PERIOD BREAKDOWN**

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED	EXTRA TESTS	TESTS COMPLETED
--------	-----------	----------------	----------------	-------------	-----------------

**CONFIRMATION** [Close]

You are about to close the current program interval **01/01/2024 - 12/31/2024** for pool **2024 Import Test**.

Once the current program interval is closed no further random selections can be run for that interval.

A new interval will be created and incremented by one year. All other pool settings and criteria will remain the same as the current interval. Program compliance calculations will be reset to reflect the new program interval.

Program Interval (New):  To

Selection Interval: Monthly

Any pool configuration changes to the new program interval pool must be made on the pool detail page before the first selection is run. Once the first selection has been performed, most pool configurations will be locked.

To continue press Verify.

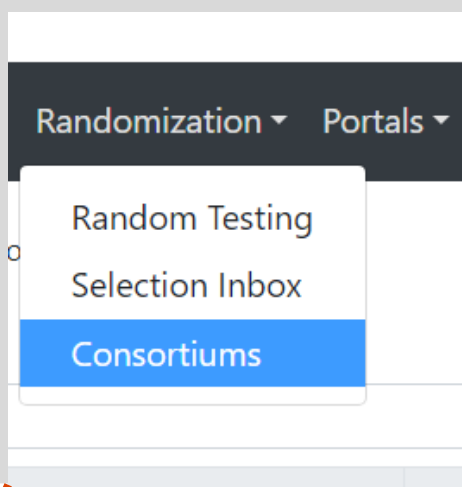
**CANCEL** **VERIFY**



**Workforce**

# Random Testing with Consortiums

# Consortiums



The Consortiums Randomization Module is used for setting up a random pool containing multiple companies. Setup must be done on the Master Portal Level.

Log in to your Workforce account and navigate to the **Randomization** tab, then select **Consortiums**.



Show Archived Orders

Select Search [input] CLEAR

WATCH RESOLVE CUSTOMIZE EXPORT CSV CLEAR FILTERS

<input type="checkbox"/>	WATCH	ID NUMBER	NAME	SERVICE	SAMPLE RESULT	STATUS	COMPANY	eDocs	REGULATED	AUTHORIZATION ID	SAM
<input type="checkbox"/>		*****9999 CL	Moes, Shane	Lab Based Urine Test		3 Collected In Process	New Test Company 1		Yes	96290517	NS11
<input type="checkbox"/>		*****jd1 EmployerID	Donor1, John	Lab Based Urine Test		2 Site Selected	Demo Company, Inc.		No	81221803	Not I
<input type="checkbox"/>		*****9878 SSN	Meeps, Harold	Lab Based Urine Test		2 Site Selected	Harry's Fish Shack		No	80755092	Not I
<input type="checkbox"/>		*****4404 CL	Land, Mary	Lab Based Urine Test		2 Site Selected	CRL Test 91373		Yes	81240175	Not I

# Create New Consortium

The Consortium Pools page displays any existing consortiums.

To set up a new Consortium, select **Create New Consortium**.

The screenshot shows the CRL Workforce interface. At the top left is the logo for CRL formfox Workforce. Below it is a navigation bar with links: Home, Result Exceptions 135, Randomization, Portals, Order, Site Search, Results, Reports, and Administration. On the right of the navigation bar is 'ABC TPA Services, Inc. Account'. Below the navigation bar are two tabs: 'Consortium Pools' (active) and 'Consortium Personnel'. A search bar is present with a search icon and a 'CLEAR' button. To the right of the search bar are three buttons: 'RUN CONSORTIUMS', 'CREATE NEW CONSORTIUM' (highlighted with a red box), and 'EXPORT CSV'. Below these buttons is a table with the following data:

<input type="checkbox"/>	CONSORTIUM NAME	POOL ID	SELECTION INTERVAL	LAST SELECTION	LAST UPDATE	DATE READY TO RUN	READY TO RUN
<input type="checkbox"/>	Roach Consortium	ROACON	Monthly			09/18/2024	
<input type="checkbox"/>	100504 Prod	100504P	Weekly	WK46-24 (Canceled)			
<input type="checkbox"/>	test cons 2024	tc2024	Quarterly			04/09/2024	
<input type="checkbox"/>	Test Consortium QA	TCONQA	Quarterly	Q2-24			

Order Site Search Results Reports Administration

## Create New Consortium

Pool Name \* Test Consortium

Pool ID \* TestCnsrt1

Federally Regulated \* Select

Selection Interval \* Select

Pool Calculation Type \* Select

Drug \*

Alcohol \*

Panel Code \*

Pool Membership Type \* Criteria

Include companies with no selection

Pool Report ID Type \* SSN

CANCEL SUBMIT

## Fill out the New Consortium Form

**Pool Name:** What should the pool be called?

**Pool ID:** How the pool will be listed.  
(10 character limit)

**Federally Regulated: Yes or No?**  
If Yes, select the appropriate Regulatory Mode(s).  
Select as many as apply.

Federally Regulated \* Yes

Regulatory Mode(s) \* Select

Selection Interval \* FAA  
FMCSA

Pool Calculation Type \* FRA  
FTA  
HHS  
NRC  
PHMSA

Drug \*

Alcohol \*

Panel Code \* USCG

# Consortium Setup

Order Site S... Run Consortium

### Create New Consortium

Pool Name \* Test Consortium

Pool ID \* TestCnsrt1

Federally Regulated \* Yes

Regulatory Mode(s) \* FMCSA x

Selection Interval \* Select

Pool Calculation Type \* Select

Drug \* Monthly

Alcohol \*

Panel Code \*

Pool Membership Type \* Criteria

Include companies with no selection

Pool Report ID Type \* SSN

CANCEL SUBMIT

**Selection Interval:** How often will a testing pool be run? Monthly and Quarterly are the most common.

# Consortium Setup

**Create New Consortium** [X]

Pool Name \*

Pool ID \*

Federally Regulated \*

Regulatory Mode(s) \*

Selection Interval \*

Pool Calculation Type \*

Drug \*

Alcohol \*

Panel Code \*

Pool Membership Type \*

Include companies with no selection

Pool Report ID Type \*

## Pool Calculation Type:

**Annual Percentage:** A chosen percentage of pool members will be tested each year.

**Fixed Number of Selections for Program Year:** A specific number of pool members will be tested each year.

**Create New Consortium** [X]

Pool Name \*

Pool ID \*

Federally Regulated \*

Regulatory Mode(s): \*

Selection Interval \*

Pool Calculation Type \*

**Drug \***  %

**Alcohol \***  %

Panel Code \*

Pool Membership Type \*

Include companies with no selection

Pool Report ID Type \*

**Choose Percentage or Number of Tests Per Year:**

**Drug:** In this example, 55% of pool members will be drug tested each year.

**Alcohol:** In this example, 15% of pool members will be alcohol tested each year.

# Consortium Setup

Order Site S... Products... Administration

## Create New Consortium

Pool Name \* Test Consortium

Pool ID \* TestCnsrt1

Federally Regulated \* Yes

Regulatory Mode(s) \* FMCSA x

Selection Interval \* Quarterly

Pool Calculation Type \* Annual Percentage

Drug \* 55 %

Alcohol \* 15 %

**Panel Code \* 30C7**

Pool Membership Type \* Select

Include companies with no selection

Pool Report ID Type \* SSN

CANCEL SUBMIT

### Type in the Panel Code:

Fill in the Panel Code for the test panel to be run on pool members.

The panel code must be set up on each company account included within the Consortium.

# Consortium Setup

Order Site

## Create New Consortium

Pool Name \* Test Consortium

Pool ID \* TestCnsrt1

Federally Regulated \* Yes

Regulatory Mode(s) \* FMCSA x

Selection Interval \* Quarterly

Pool Calculation Type \* Annual Percentage

Drug \* 55 %

Alcohol \* 15 %

Panel Code \* 30C7

Pool Membership Type \* Select

Include companies with no selection

Pool Report ID Type \* SSN

CANCEL SUBMIT

**Pool Membership Type:** How will pool members be added?

**File Import:** Add members from an imported roster list.

**Criteria:** Pool members are added from existing personnel files in the system based on criteria.

Order Site S... P... B... A... S...

## Create New Consortium

Pool Name \* Test Consortium

Pool ID \* TestCnsrt1

Federally Regulated \* Yes

Regulatory Mode(s) \* FMCSA x

Selection Interval \* Quarterly

Pool Calculation Type \* Annual Percentage

Drug \* 55 %

Alcohol \* 15 %

Panel Code \* 30C7

Pool Membership Type \* File Import

Include companies with no selection

Pool Report ID Type \* SSN

CANCEL SUBMIT

**Include Companies with no Selection:** Do you want to include companies in the consortium data, even if they do not have a selection scheduled?

# Consortium Setup

Order Site

## Create New Consortium

Pool Name \* Test Consortium

Pool ID \* TestCnsrt1

Federally Regulated \* Yes

Regulatory Mode(s) \* FMCSA x

Selection Interval \* Quarterly

Pool Calculation Type \* Annual Percentage

Drug \* 55 %

Alcohol \* 15 %

Panel Code \* 30C7

Pool Membership Type \* File Import

Include companies with no selection

Pool Report ID Type \* DriverID

- SSN
- EmployerID
- DriverID
- AlternatelD

RUN CONSOR

DATE READY TO

help? Email work

**Pool Report ID Type:**  
What type of ID number will be used for pool members?

**Note:** Imported roster lists must include this ID type for each person listed. Also, each company included in the consortium must be set up to use this ID type in Workforce.

# Consortium Setup

Order Site

### Create New Consortium

Pool Name \* Test Consortium

Pool ID \* TestCnsrt1

Federally Regulated \* Yes

Regulatory Mode(s): \* FMCSA x

Selection Interval \* Quarterly

Pool Calculation Type \* Annual Percentage

Drug \* 55 %

Alcohol \* 15 %

Panel Code \* 30C7

Pool Membership Type \* File Import

Include companies with no selection

Pool Report ID Type \* DriverID

CANCEL SUBMIT

**Submit:** Click submit to create the new consortium.

The new consortium has been added to the Consortia page.  
Click on the consortium name to see the new consortium and the consortium details.



Consortium Pools Consortium Personnel

All Search CLEAR

RUN CONSORTIUMS CREATE NEW CONSORTIUM EXPORT CSV

<input type="checkbox"/>	CONSORTIUM NAME	POOL ID	SELECTION INTERVAL	LAST SELECTION	LAST UPDATE	DATE READY TO RUN	READY TO RUN
<input type="checkbox"/>	Test Consortium	TestCnsrt1	Quarterly			12/10/2024	

Total records: 1

If you need to edit any of the setup information:  
Click **General Information**.

### CONSORTIUM DETAILS

#### TEST CONSORTIUM (TestCnsrt1)

**STATISTICS** **GENERAL INFORMATION** CONSORTIUM MEMBERS RUN RANDOM PERSONNEL IMPORT CLOSE PROGRAM INTERVAL

[Run Excused Report](#)

#### TESTING PERIOD BREAKDOWN

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED		EXTRA TESTS		TESTS COMPLETED		STATUS	ACTION
			DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL		
NO DATA FOUND										

#### TESTING TOTALS

	CURRENT POOL	AVERAGE POOL SIZE	DRUG SPECIMEN PERCENTAGE	ALCOHOL SPECIMEN PERCENTAGE
	0	0	55%	15%
	0	0	0%	0%

Legend: ● DRUG ● ALCOHOL

If you need to edit any of the setup information:

Click the edit icon.

**CONSORTIUM DETAILS** [Close]

**TEST CONSORTIUM (TestCnsrt1)**

STATISTICS **GENERAL INFORMATION** CONSORTIUM MEMBERS RUN RANDOM PERSONNEL IMPORT CLOSE PROGRAM INTERVAL

**MODIFY POOL CONFIGURATION** [Total tests performed for missed periods](#)

POOL NAME	Test Consortium
POOL ID	TestCnsrt1
PROGRAM INTERVAL	01/01/2024 To 12/31/2024
FEDERALLY REGULATED	Yes
REGULATORY MODE(S)	FMCSA
SELECTION INTERVAL	Quarterly
POOL CALCULATION TYPE	Annual Percentage
DRUG	55%
ALCOHOL	15%
PANEL CODE	30C7
POOL MEMBERSHIP TYPE	File Import
INCLUDE COMPANIES WITH NO SELECTIONS	No
POOL REPORT ID TYPE *	DriverID
WHO CAN RUN POOL	Portal Administrator Only

# Add Consortium Members

The next step is to add companies to the Consortium :

From the Consortium Details page, select **Consortium Members**.

The screenshot shows a web application interface for 'CONSORTIUM DETAILS'. The main title is 'TEST CONSORTIUM (TestCnsrt1)'. Below the title is a navigation bar with several tabs: 'STATISTICS' (highlighted in orange), 'GENERAL INFORMATION', 'CONSORTIUM MEMBERS' (highlighted with a red box and an orange line pointing to the text above), 'RUN RANDOM', 'PERSONNEL IMPORT', and 'CLOSE PROGRAM INTERVAL'. Below the navigation bar is a link for 'Run Excused Report'. The main content area is divided into two sections: 'TESTING PERIOD BREAKDOWN' and 'TESTING TOTALS'. The 'TESTING PERIOD BREAKDOWN' section contains a table with columns for 'PERIOD', 'POOL SIZE', 'SELECTION DATE', 'TESTS SELECTED' (subdivided into 'DRUG' and 'ALCOHOL'), 'EXTRA TESTS' (subdivided into 'DRUG' and 'ALCOHOL'), 'TESTS COMPLETED' (subdivided into 'DRUG' and 'ALCOHOL'), 'STATUS', and 'ACTION'. The table currently shows 'NO DATA FOUND'. The 'TESTING TOTALS' section displays summary statistics: 'CURRENT POOL' (0), 'AVERAGE POOL SIZE' (0), 'DRUG SPECIMEN PERCENTAGE' (55%), and 'ALCOHOL SPECIMEN PERCENTAGE' (15%). Below these statistics is a horizontal bar chart with a legend for 'DRUG' (orange) and 'ALCOHOL' (black). The chart shows 'ESTIMATED TESTS REQUIRED' (0), 'TOTAL TESTS COMPLETED' (0), and 'TOTAL TESTS PENDING COLLECTION' (0). The x-axis of the chart ranges from 0 to 1.0.

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED		EXTRA TESTS		TESTS COMPLETED		STATUS	ACTION
			DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL		
NO DATA FOUND										

Metric	Value	Drug Specimen Percentage	Alcohol Specimen Percentage
CURRENT POOL	0	55%	15%
AVERAGE POOL SIZE	0	0%	0%

Metric	Value
ESTIMATED TESTS REQUIRED	0
TOTAL TESTS COMPLETED	0
TOTAL TESTS PENDING COLLECTION	0

## Add Consortium Members

The next step is to add companies to the Consortium :

From the Consortium Members page, select **Criteria** and **Company** from pop up window.

CONSORTIUM DETAILS

TEST CONSORTIUM (TestCnsr1)

STATISTICS GENERAL INFORMATION **CONSORTIUM MEMBERS** RUN RANDOM PERSONNEL IMPORT CLOSE PROGRAM INTERVAL

Active Criteria ADVANCED FILTERS CUSTOMIZE EXPORT CSV ADD INDIVIDUAL

<input checked="" type="checkbox"/>	PERSONNEL ID	NAME	COMPANY	OCCUPATION	LOCATION	REGULATORY MODE	ACTIVE SINCE	INACTIVATE
NO DATA FOUND								

Total records: 0

CRITERIA

Company

Regulatory Mode FMCSA

Save Query Cancel Clear Filter Save

## Add Consortium Members

### Companies set up within the portal will be listed.

Companies that do not have the correct criteria will be greyed out and the error listed in parentheses. Eligible companies will be listed in black. Select each company and use the > arrow to move it to **Selected Criteria**. Once you have made your selections, click **Save**.

**COMPANIES**

Possible Criteria

- Hank's Waffle ouse (No LabAccounts)
- Happily Ever After Transit (No LabAccounts)
- Harry's Fish Shack
- Hook Test Co (No LabAccounts)
- Hook Test Co 2 (No LabAccounts)
- Jack's Trucking

Selected Criteria

»

>

<

«

Cancel Save

CRITERIA

Saved Queries

Company

Save Query Cancel Clear Filter Save

# Add Individual Consortium Member

To add an individual consortium member:

From the Consortium details page, select **Add Individual**. Search for the person via ID or other criteria. If not found, click **Add**.

CONSORTIUM DETAILS ✕

TEST CONSORT (tc2024)

STATISTICS GENERAL INFORMATION **CONSORTIUM MEMBERS** RUN RANDOM PERSONNEL IMPORT CLOSE PROGRAM INTERVAL


Active ▾ Criteria ADVANCED FILTERS CUSTOMIZE EXPORT CSV **ADD INDIVIDUAL**

<input type="checkbox"/>	PERSONNEL ID ▾	NAME ▾	COMPANY ▾	OCCUPATION ▾	LOCATION ▾	REGULATORY MODE ▾	ACTIVE SINCE ▾	INACTIVATE
<input type="checkbox"/>	77	TESTER77, TESTER77	Tiki Tom's Margaritas			FMCSA		<input type="checkbox"/>
<input type="checkbox"/>	76	TESTER76, TESTER76	Mary's Malt Shop			FMCSA		<input type="checkbox"/>
<input type="checkbox"/>	75	TESTER75, TESTER75	Victor's Pizza			FMCSA		<input type="checkbox"/>
<input type="checkbox"/>	74	TESTER74, TE						<input type="checkbox"/>
<input type="checkbox"/>	73	TESTER73, TE						<input type="checkbox"/>

**ADD INDIVIDUAL** ✕

Check For Existing Personnel

Alternate ID ▾ 1999

 Person is not found. Please add new person

**Add employee information:**

Add information for the employee and click **Save**.

**ADD INDIVIDUAL** [X]

Create and Add New Pool Member

ID \* 1999

FIRST NAME \*

LAST NAME \*

COMPANY \*

REGION None

LOCATION None

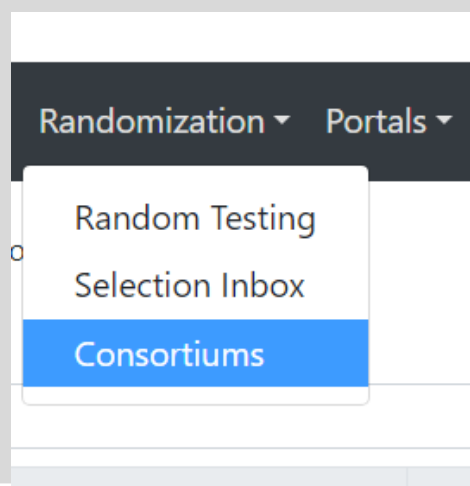
REGULATORY MODE FMCSA

CATEGORY Select

Johnson Brothers FMCSA



## Add Consortium Personnel List



Before making a random selection, first add a roster to the consortium:

Navigate to the **Randomization** tab, then select **Consortiums**. Select the Consortium Name.



Consortium Pools Consortium Personnel

All Search CLEAR

RUN CONSORTIUMS CREATE NEW CONSORTIUM EXPORT CSV

<input type="checkbox"/>	CONSORTIUM NAME	POOL ID	SELECTION INTERVAL	LAST SELECTION	LAST UPDATE	DATE READY TO RUN	READY TO RUN
<input type="checkbox"/>	DOT Trucking Consortium	DOTTRUC	Monthly	Jan-25			
<input type="checkbox"/>	Consortium 2025	2025	Monthly			12/18/2024	
<input type="checkbox"/>	Kim Test Consortium	testkim1	Quarterly			11/21/2024	
<input type="checkbox"/>	Roach Consortium	ROACON	Monthly			09/18/2024	
<input type="checkbox"/>	100504 Prod	100504P	Weekly	WK46-24 (Canceled)			
<input type="checkbox"/>	test consort	tc2024	Quarterly			04/09/2024	

## Add Consortium Personnel List

From Consortium Details, click Personnel Import to add a roster.

Click **Choose File** to upload a CSV file. The CSV roster should include First Name, Last Name, ID, Regulatory Mode, and Employee Category. Click **Next**.

The screenshot displays the 'CONSORTIUM DETAILS' interface for 'TEST CONSORT (tc2024)'. The top navigation bar includes 'STATISTICS', 'GENERAL INFORMATION', 'CONSORTIUM MEMBERS', 'RUN RANDOM', 'PERSONNEL IMPORT' (highlighted with an orange box and a mouse cursor), and 'CLOSE PROGRAM INTERVAL'. Below this, the 'UPLOAD FILE' section is visible, featuring the text 'Import CSV File' and 'Upload file:'. A file selection button labeled 'Choose File' and 'No file chosen' is highlighted with an orange box. A checked checkbox labeled 'File has header row' is also present. At the bottom right of the interface, there are 'RESET' and 'NEXT' buttons. The footer of the interface shows 'Roach Consortium', 'ROACON', 'Monthly', and the date '09/18/2024'.

## Add Consortium Personnel List

### Map CSV columns to fields.

Use the drop-down arrow next to each column header to map each to a field. Required information must be mapped to a column. Skip any columns you do not wish to import. Once imported, members can be viewed under the **Consortium Members** tab.

**CONSORTIUM DETAILS** ✕

**TEST CONSORT (tc2024)**

STATISTICS GENERAL INFORMATION CONSORTIUM MEMBERS RUN RANDOM **PERSONNEL IMPORT** CLOSE PROGRAM INTERVAL

**FIELD MAPPINGS FOR:**

Company Primary ID Type: Unknown Pool Primary ID Type: AlternateID

Last Name	First Name	Alt ID	Skipped Field	Regulatory Mode	Employee Category	Skipped Field	Skipped Field	Skipped Field
First Name	Last Name	DONOR ID	Company Code	REG MODE	CATEGORY	Code	SUP F NAME	
TESTER1	TESTER1	1	FOXU00040	FMCSA	DRIVER	1	KIM	
TESTER2	TESTER2	2	8897678876	FMCSA	DRIVER	2	KIM	
TESTER3	TESTER3	3	JOESHOE	FMCSA	DRIVER	3	KIM	
TESTER4	TESTER4	4	FOXU00702	FMCSA	DRIVER	4	KIM	
TESTER5	TESTER5	5	5555566666	FMCSA	DRIVER	5	KIM	
TESTER6	TESTER6	6	FOXU00714	FMCSA	DRIVER	6	KIM	
TESTER7	TESTER7	7	JOESHOE	FMCSA	DRIVER	7	KIM	
TESTER8	TESTER8	8	FOXU00820	FMCSA	DRIVER	8	KIM	
TESTER9	TESTER9	9	FOXU00822	FMCSA	DRIVER	9	KIM	
TESTER10	TESTER10	10	22334455	FMCSA	DRIVER	10	KIM	
TESTER11	TESTER11	11	FOXU00836	FMCSA	DRIVER	11	MELISSA	
TESTER12	TESTER12	12	FOXU00040	FMCSA	DRIVER	12	MELISSA	
TESTER13	TESTER13	13	8897678876	FMCSA	DRIVER	13	MELISSA	
TESTER14	TESTER14	14	JOESHOE	FMCSA	DRIVER	14	MELISSA	
TESTER15	TESTER15	15	FOXU00702	FMCSA	DRIVER	15	MELISSA	

**Skipped Field** dropdown menu:

- Cell Phone
- City
- Country
- Date of Birth
- Hire Date**
- Termination Date
- Email Address
- Gender
- Home Phone
- Inactive
- Reason For Inactivation
- Location
- Occupation Code
- Province
- Region
- Alt Employee Category
- Alt Regulatory Mode
- Pre-Employment Test on File
- State

## Check for errors.

After all columns have been mapped, click **Submit for Validation**. Any fields with an error or unmapped required fields will return an error. Click **Back**, correct the mapping, and **Submit for Validation** again.

TESTER75	TESTER75	75	FOXU00822	FMCSA	DRIVER		OCCUPATION 75	KIM
TESTER76	TESTER76	76	22334455	FMCSA	DRIVER		OCCUPATION 76	KIM
TESTER77	TESTER77	77	FOXU00836	FMCSA	DRIVER		OCCUPATION 77	KIM
TESTER78	TESTER78	78	FOXU00836	FMCSA	DRIVER	MANAGER	OCCUPATION 78	KIM

BACK SUBMIT FOR VALIDATION

### IMPORT FILE VALIDATION FOR:

Import file validation: (78 of 78 have errors)

Line #	Validation errors and warnings	Last Name	First Name	Alt ID	Regulatory Mode	Employee Category	Manager
2	<b>Errors:</b> Field 'Company Code': Company Code is empty;	TESTER1	TESTER1	1	FMCSA	DRIVER	
3	<b>Errors:</b> Field 'Company Code': Company Code is empty;	TESTER2	TESTER2	2	FMCSA	DRIVER	
4	<b>Errors:</b> Field 'Company Code': Company Code is empty;	TESTER3	TESTER3	3	FMCSA	DRIVER	MANAGER
5	<b>Errors:</b> Field 'Company Code': Company Code is empty;	TESTER4	TESTER4	4	FMCSA	DRIVER	MANAGER

### Confirm the records import.


Once the import is error-free, click **Import**. Click **Confirm** to finalize the Roster Import. The system may take a minute to process the import. You will see a green success message once the Records import.

**IMPORT FILE VALIDATION FOR:**  
Import file validation: (0 of 78 have errors)


Consortium 2025	2025	Monthly	12/18/2024
Fin Test Consortium	testum1	Quarterly	11/21/2024
Roach Consortium	ROACON	Monthly	09/18/2024
100524 Prod	100504P	Weekly	
test consort	tc2024	Quarterly	04/09/2024

BACK CANCEL **IMPORT**

**IMPORT CONFIRMATION** x

 You are about to submit 78 of 78 records for import. You will receive a message once the process is complete.

CANCEL **CONFIRM**

 Records imported successfully.

## Verify the records import.

Verify that the number of records shown is the same as the number of records imported, both on the **Statistics** tab and the **Consortium Members** tab.

### CONSORTIUM DETAILS

#### TEST CONSORT (tc2024)

**STATISTICS** GENERAL INFORMATION CONSORTIUM MEMBERS RUN RANDOM PERSONNEL IMPORT CLOSE PROGRAM INTERVAL

[Run Excused Report](#)  
[Pool Audit Details](#)

#### TESTING PERIOD BREAKDOWN

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED		EXTRA TESTS		TESTS COMPLETED		STATUS	ACTION
			DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL		
NO DATA FOUND										

#### TESTING TOTALS

CURRENT POOL	78	DRUG TEST PROGRAM TARGET	55%	ALCOHOL TEST PROGRAM TARGET	15%
AVERAGE POOL SIZE	78	DRUG TEST PROGRAM ACTUAL	0%	ALCOHOL TEST PROGRAM ACTUAL	0%

Category	Drug	Alcohol
ESTIMATED TESTS REQUIRED	43	0
TOTAL TESTS COMPLETED	0	0
TOTAL TESTS PENDING COLLECTION	0	0

<input type="checkbox"/>	61	TESTER61, TESTER61	Sales Demo			FMCSA	<input type="checkbox"/>
<input type="checkbox"/>	60	TESTER60, TESTER60	Jack's Trucking			FMCSA	<input type="checkbox"/>
<input type="checkbox"/>	59	TESTER59, TESTER59	Fancy Pants Apparel			FMCSA	<input type="checkbox"/>

Total records: 78

First Previous 1 2 3 Next Last

## Verify the records import.

Verify that the number of records shown is the same as the number of records imported, both on the **Statistics** tab and the **Consortium Members** tab.

**CONSORTIUM DETAILS** x

**TEST CONSORT (tc2024)**

STATISTICS
GENERAL INFORMATION
CONSORTIUM MEMBERS
RUN RANDOM
PERSONNEL IMPORT
CLOSE PROGRAM INTERVAL

[Run Excused Report](#)

[Pool Audit Details](#)

**TESTING PERIOD BREAKDOWN**

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED		EXTRA TESTS		TESTS COMPLETED		STATUS	ACTION
			DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL		
NO DATA FOUND										

**TESTING TOTALS**

CURRENT POOL	78	DRUG TEST PROGRAM TARGET	55%	ALCOHOL TEST PROGRAM TARGET	15%
AVERAGE POOL SIZE	78	DRUG TEST PROGRAM ACTUAL	0%	ALCOHOL TEST PROGRAM ACTUAL	0%

● DRUG 
 ● ALCOHOL

<input type="checkbox"/>	61	TESTER61, TESTER61	Sales Demo			FMCSA	<input type="checkbox"/>
<input type="checkbox"/>	60	TESTER60, TESTER60	Jack's Trucking			FMCSA	<input type="checkbox"/>
<input type="checkbox"/>	59	TESTER59, TESTER59	Fancy Pants Apparel			FMCSA	<input type="checkbox"/>

Total records: 78

First
Previous
1
2
3
Next
Last

# Run Random Selection for a Consortium

Under Consortium Details, locate the Run Random tab.

Tests Required for Selection will be automatically calculated based on the percentages used to set up the consortium. Administrators can increase the selection by editing the Actual to Select number. Click Run Selection. Click Confirm.

The screenshot shows the 'CONSORTIUM DETAILS' interface for 'TEST CONSORT (tc2024)'. The 'RUN RANDOM' tab is selected. Under 'TESTS REQUIRED FOR SELECTION', there are two rows: 'DRUG' with a value of 13 and 'ALCOHOL' with a value of 4. Each row has an 'ACTUAL TO SELECT' input field. The 'DRUG' field contains '13' and the 'ALCOHOL' field contains '4'. A 'RUN SELECTION' button is highlighted with a red box. A 'CONFIRM RUN RANDOM' dialog is open, asking 'Are you sure you want to run random selection process?' with 'CANCEL' and 'CONFIRM' buttons.

Category	Value	Actual To Select
DRUG	13	13
ALCOHOL	4	4

# Run Random Selection for a Consortium

A confirmation will show Random Selection complete.

Print the Random Selection Master List by clicking on the link. You can print or export the selection list. You can also print notification letters for individual employees. Select **Finish**.

### CONSORTIUM DETAILS

TEST CONSORT (tc2024)

STATISTICS GENERAL INFORMATION CONSORTIUM MEMBERS **RUN RANDOM** PERSONNEL IMPORT CLOSE PROGRAM INTERVAL

Random Selection complete!  
You may [Print the Random Selection Master List](#) for the selected tests or press finish to complete the selection process and report the selections.  
The following reporting of this selection process will be performed:

COMPANIES	EMAIL	FAX	FORMFOX	CISNET	LAST UPDATE
-----------	-------	-----	---------	--------	-------------

Kim Test Consortium testkim1 Quarterly

### RANDOM SELECTION LIST

test consort

01/01/2025 - 03/31/2025

COMPANY	PRIMARY ID	NAME	SELECTION DATE	TEST FOR	COMPLETED DATE
Joe's Shoes (JOESHOE)	58	TESTER58, TESTER58	01/21/2025 10:12	D,A	
Joe's Shoes (JOESHOE)	3	TESTER3, TESTER3	01/21/2025 10:12	D,A	
Joe's Shoes (JOESHOE)	7	TESTER7, TESTER7	01/21/2025 10:12	D,A	
Joe's Shoes (JOESHOE)	47	TESTER47, TESTER47	01/21/2025 10:12	D	
Johnson Brothers (8897678876)	24	TESTER24, TESTER24	01/21/2025 10:12	D	
Mary's Malt Shop (22334455)	21	TESTER21, TESTER21	01/21/2025 10:12	D	
Mary's Malt Shop (22334455)	54	TESTER54, TESTER54	01/21/2025 10:12	D	
Mary's Malt Shop (22334455)	32	TESTER32, TESTER32	01/21/2025 10:12	D	
Sales Demo (FOXU00714)	61	TESTER61, TESTER61	01/21/2025 10:12	D,A	
Tiki Tom's Margaritas (FOXU00836)	78	TESTER78, TESTER78	01/21/2025 10:12	D	
Victor's Pizza (FOXU00822)	75	TESTER75, TESTER75	01/21/2025 10:12	D	

EXPORT PRINT PRINT NOTIFICATION LETTERS

CLOSE

**FINISH**

The selection can also be viewed on the Consortium Details page.  
 Select the **Statistics** tab and Click on the **Period**.

### CONSORTIUM DETAILS X

**TEST CONSORT (tc2024)**

STATISTICS
GENERAL INFORMATION
CONSORTIUM MEMBERS
RUN RANDOM
PERSONNEL IMPORT
CLOSE PROGRAM INTERVAL

[Run Excused Report](#)

[Pool Audit Details](#)

#### TESTING PERIOD BREAKDOWN

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED		EXTRA TESTS		TESTS COMPLETED		STATUS	ACTION
			DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL		
Q1-25	78	01/21/2025	11	4	0	0	0	0		<span style="color: red;">X</span> Cancel

#### TESTING TOTALS

CURRENT POOL	78	DRUG TEST PROGRAM TARGET	55%	ALCOHOL TEST PROGRAM TARGET	15%
AVERAGE POOL SIZE	78	DRUG TEST PROGRAM ACTUAL	0%	ALCOHOL TEST PROGRAM ACTUAL	0%

The chart shows the following data points:

Category	Drug	Alcohol
ESTIMATED TESTS REQUIRED	43	12
TOTAL TESTS COMPLETED	0	0
TOTAL TESTS PENDING COLLECTION	11	4

Legend: ● DRUG ● ALCOHOL

# Order Random Tests

Testing orders can be started from the Selection Inbox.  
From the Selection Inbox, locate the employee and click on the Status.

Home Result Exceptions 146 Randomization Portals Order Site Search Results Reports Administration ABC TPA Services, Inc. Account

Select Search CLEAR CUSTOMIZE EXPORT CSV CLEAR FILTERS

STATUS	PERSONNEL ID	NAME	SERVICE	POOL	SELECTION	COMPANY	REGULATED	CREATED	NOTIFIED	AUTHORIZATION ID	SITE	REGULATORY MODE
PENDING	*****21	TESTER21, TESTER21	Lab Based Urine Test	test consort	Q1-25	Mary's Malt Shop	TRUE	01/21/2025				FMCSA
PENDING	*****24	TESTER24, TESTER24	Lab Based Urine Test	test consort	Q1-25	Johnson Brothers	TRUE	01/21/2025				FMCSA
PENDING	*****3	TESTER3, TESTER3	Lab Based Urine Test	test consort	Q1-25	Joe's Shoes	TRUE	01/21/2025				FMCSA
			Alcohol Breath Test	test consort	Q1-25	Joe's Shoes	TRUE	01/21/2025				FMCSA

An order form will open and you will proceed with ordering the test as usual. The donor information and test panel will automatically be set per the consortium setup and random selection. For more help with ordering, see the **Workforce Ordering Guide**. After the order is placed, the status will change to **Ordered**. The **Authorization ID** and Test **Site** will be shown.

STATUS	PERSONNEL ID	NAME	SERVICE	POOL	SELECTION	COMPANY	REGULATED	CREATED	NOTIFIED	AUTHORIZATION ID	SITE	REGULATORY MODE
PENDING	*****21	TESTER21, TESTER21	Lab Based Urine Test	test consort	Q1-25	Mary's Malt Shop	TRUE	01/21/2025				FMCSA
ORDERED [Set to PENDING]	*****24	TESTER24, TESTER24	Lab Based Urine Test	test consort	Q1-25	Johnson Brothers	TRUE	01/21/2025		98800694	CRL/FF Test Clinic Only- DO NOT USE	FMCSA

# Excuse From Selection in a Consortium

Like a stand-alone pool, admins can excuse an individual.

From the **Selection Inbox**, find the employee and click on the **Created Date**. If the test has already been ordered, first click **Set to Pending** under the **Status**.

ORDERED

[Set to PENDING]

Home Result Exceptions 146 Randomization Portals Order Site Search Results Reports Administration ABC TPA Services, Inc. Account

Select Search CLEAR CUSTOMIZE EXPORT CSV CLEAR FILTERS

STATUS	PERSONNEL ID	NAME	SERVICE	POOL	SELECTION	COMPANY	REGULATED	CREATED	NOTIFIED	AUTHORIZATION ID	SITE	REGULATORY MODE
PENDING	*****21	TESTER21, TESTER21	Lab Based Urine Test	test consort	Q1-25	Mary's Malt Shop	TRUE	01/21/2025				FMCSA
PENDING	*****24	TESTER24, TESTER24	Lab Based Urine Test	test consort	Q1-25	Johnson Brothers	TRUE	01/21/2025				FMCSA

Use the dialog box to either Excuse and choose an alternate or simply Excuse the donor. Select the reason from the dropdown. If necessary, comment on the reason. If you choose to alternate, a new person will be selected and both will be reflected in the Selection Inbox.

STATUS	PERSONNEL ID
EXCUSED	****1111
PENDING ALT	*****zd1

### EXCUSE EVENTS

You have selected to excuse TESTER24 TESTER24 from taking a pending Lab Based Urine Test. Doing so will remove this event from being tested for the associated pool and will affect the minimum required events to be completed for this selection period. You are required to provide reason for excusal.

You have the option to excuse the donor from testing or excusing the donor and selecting an alternate donor from the current selection period.

Clicking "Excuse" will mark the scheduling event status as "Excused", will add the comments to the scheduling notes and will remove the event from the Random Selection Inbox grid. Excused events can be filtered from the Results grid.

Clicking "Excuse + Alternate" will excuse the current donor (same as above) and add an alternate donor to the Inbox grid with a status of "Pending ALT". Alternates can be scheduled for testing in the same way as "Pending".

Please note that alternates will be created with same event types as the excused record. (i.e. If a drug and alcohol were excused, then a drug and alcohol will be created for the alternate donor.)

EXCUSE + ALTERNATE
  EXCUSE

LOA until end of Period ⓘ

## Excuse From Selection in a Consortium

### View the breakdown with the excused and alternate selected.

From the **Consortium Details** page, click on the **Statistics** tab. Click on the **Period** link. The excused employee will be marked with an “x”. The new alternate will be marked with a “+”.

**RANDOM SELECTION LIST** ×

**test consort** EXPORT PRINT

01/01/2025 - 03/31/2025 PRINT NOTIFICATION LETTERS

COMPANY	PRIMARY ID	NAME	SELECTION DATE	TEST FOR	COMPLETED DATE
Joe's Shoes (JOESHOE)	58	TESTER58, TESTER58	01/21/2025 10:12	D,A	
Joe's Shoes (JOESHOE)	3	TESTER3, TESTER3	01/21/2025 10:12	D,A	
Joe's Shoes (JOESHOE)	7	TESTER7, TESTER7	01/21/2025 10:12	D,A	
Joe's Shoes (JOESHOE)	47	TESTER47, TESTER47	01/21/2025 10:12	D	
Johnson Brothers (8897678876)	24	TESTER24, TESTER24	01/21/2025 10:12	D(X)	
Mary's Malt Shop (22334455)	21	TESTER21, TESTER21	01/21/2025 10:12	D	
Mary's Malt Shop (22334455)	54	TESTER54, TESTER54	01/21/2025 10:12	D	
Mary's Malt Shop (22334455)	32	TESTER32, TESTER32	01/21/2025 10:12	D	
Sales Demo (FOXU00714)	61	TESTER61, TESTER61	01/21/2025 10:12	D,A	
Tiki Tom's Margaritas (FOXU00836)	78	TESTER78, TESTER78	01/21/2025 10:12	D	
Victor's Pizza (FOXU00822)	75	TESTER75, TESTER75	01/21/2025 10:12	D	
Johnson Brothers (8897678876)	68	TESTER68, TESTER68	01/21/2025 10:12	D(+)	

CLOSE

# Cancel Random Run for a Consortium

Admins can cancel a random selection that has not been ordered.

From the **Consortium Details** page, select the **Statistics** tab. Click **Cancel** next to the appropriate period. Once canceled, you have the option to **Re-Run** the selection later.

The screenshot shows the 'CONSORTIUM DETAILS' page for 'TEST CONSORT (tc2024)'. The 'STATISTICS' tab is selected. Below the navigation tabs, there are links for 'Run Excused Report' and 'Pool Audit Details'. The 'TESTING PERIOD BREAKDOWN' table shows one period: Q1-25 with a pool size of 78 and a selection date of 01/21/2025. The 'ACTION' column for this period contains a 'Cancel' button, which is highlighted with a red box. Below the table is the 'TESTING TOTALS' section, which includes a bar chart comparing 'ESTIMATED TESTS REQUIRED' (43), 'TOTAL TESTS COMPLETED' (0), and 'TOTAL TESTS PENDING COLLECTION' (11) for Drug and Alcohol tests. A 'CANCEL CONFIRMATION' dialog is overlaid on the left, with the message: 'You are about to cancel an active Selection. This cannot be undone. Are you sure you want to proceed?' and two buttons: 'No, do not cancel selection' and 'Yes, cancel selection'.

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED		EXTRA TESTS		TESTS COMPLETED		STATUS	ACTION
			DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL		
Q1-25	78	01/21/2025	12	4	0	0	0	0		Cancel

TESTING TOTALS	CURRENT POOL	AVERAGE POOL SIZE	DRUG TEST PROGRAM TARGET	ALCOHOL TEST PROGRAM TARGET	DRUG TEST PROGRAM ACTUAL	ALCOHOL TEST PROGRAM ACTUAL
ESTIMATED TESTS REQUIRED	78	78	55%	15%	43	0
TOTAL TESTS COMPLETED			0%	0%	0	0
TOTAL TESTS PENDING COLLECTION					11	4

# Re-run Random for a Consortium

To re-run a random selection, click re-run from the Statistics tab.

Confirm the Tests Required for Selection for the period. Click Run.

### CONSORTIUM DETAILS

TEST CONSORT (tc2024)

**STATISTICS** GENERAL INFORMATION CONSORTIUM MEMBERS RUN RANDOM PERSONNEL IMPORT CLOSE PROGRAM INTERVAL

[Run Excused Report](#)

[Pool Audit Details](#)

#### TESTING PERIOD BREAKDOWN

PERIOD	POOL SIZE	SELECTION DATE	TESTS SELECTED		EXTRA TESTS		TESTS COMPLETED		STATUS	ACTION
			DRUG	ALCOHOL	DRUG	ALCOHOL	DRUG	ALCOHOL		
Q1-25	0	01/21/2025	0	0	0	0	0	0	Canceled	<a href="#">Re-run</a>

#### TESTING TOTALS

CURRENT POOL	78	DRUG TEST PROGRAM TARGET	55%	ALCOHOL TEST PROGRAM TARGET	15%
AVERAGE POOL SIZE	78	DRUG TEST PROGRAM ACTUAL	0%	ALCOHOL TEST PROGRAM ACTUAL	0%

ESTIMATED TESTS REQUIRED: 43 (DRUG)

TOTAL TESTS COMPLETED: 12 (DRUG)

### TESTS REQUIRED FOR SELECTION Q1-25

DRUG	9	ACTUAL TO SELECT	<input type="text" value="9"/>
ALCOHOL	3	ACTUAL TO SELECT	<input type="text" value="3"/>

**Cancel** **Run**