



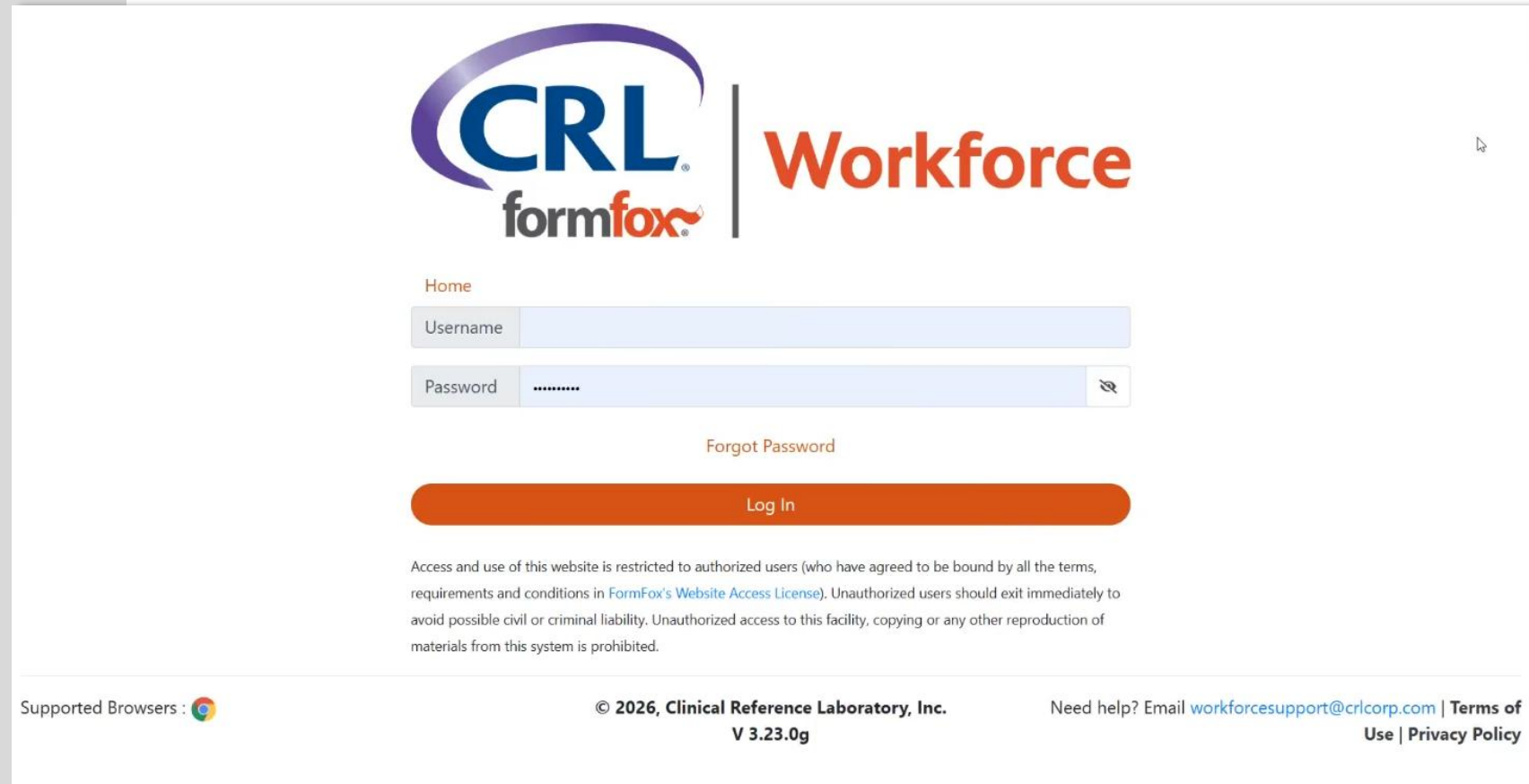
Workforce

Workforce Administration Tab

Welcome to Workforce!

This training document will illustrate how to use Administration Tab in Workforce. We will cover:

- [User Information](#)
- [Add Users](#)
- [Portal Information](#)
- [Add Company](#)
- [Add Lab Accounts](#)
- [Export Company List](#)
- [Clinic Search Options](#)
- [Orderable Services](#)
- [Order Defaults](#)
- [Lab Results Reporting](#)

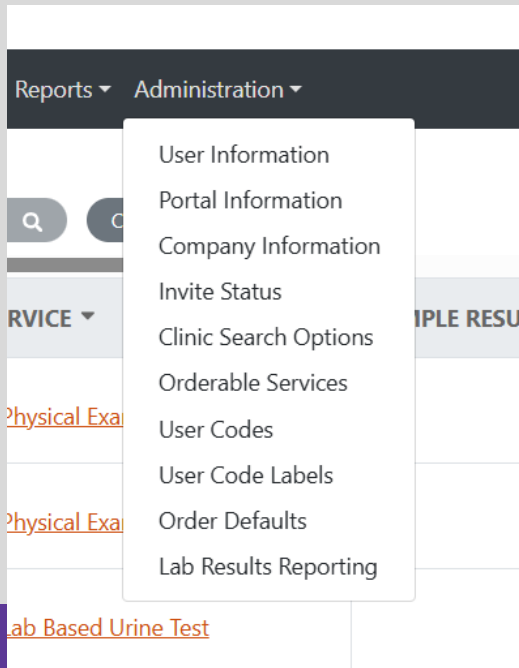


The screenshot shows the login interface for the CRL formfox Workforce portal. At the top, the CRL formfox logo is on the left, and the word "Workforce" is on the right in a large, bold, orange font. Below the logo, there is a "Home" link. The login form consists of two input fields: "Username" and "Password". The password field is masked with dots and has a small icon to its right. Below the password field is a "Forgot Password" link. A large orange button labeled "Log In" is centered below the form. At the bottom of the page, there is a footer with three sections: "Supported Browsers" with a Chrome icon, "© 2026, Clinical Reference Laboratory, Inc. V 3.23.0g", and "Need help? Email workforcesupport@crlcorp.com | [Terms of Use](#) | [Privacy Policy](#)".

Administration Tab

After logging in to the Workforce portal, you will see the results grid.

First, locate the Administration tab at the top of the page.



The screenshot shows the Workforce portal interface. At the top, the 'Administration' tab is highlighted in the navigation bar. Below the navigation bar, there is a search bar with a 'Select' dropdown, a search input field, and a 'CLEAR' button. To the right of the search bar are buttons for 'WATCH', 'RESOLVE', 'CUSTOMIZE', 'EXPORT CSV', and 'CLEAR FILTERS'. Below the search bar is a table with the following columns: WATCH, ID NUMBER, NAME, LAB ACCOUNT, SAMPLE RESULT, eDocs, SAMPLE ID, and SERVICE. The table contains five rows of data. At the bottom of the table, it says 'Total records: 157'. To the right of the table is a pagination control with buttons for 'First', 'Previous', '1', '2', '3', 'Next', and 'Last'. The '1' button is highlighted.

WATCH	ID NUMBER	NAME	LAB ACCOUNT	SAMPLE RESULT	eDocs	SAMPLE ID	SERVICE
<input type="checkbox"/>	*****8888 SSN	Benson, Barry	T0C.NUAT.REF1	Negative		CC11440002	Lab Ba
<input type="checkbox"/>	*****7777 SSN	Carter, Thomas	T0C.NUAT.REF1	Negative		CC11440001	Lab Ba
<input type="checkbox"/>	*****TC83 SSN	Sanchez, Juanita	T0C.CUAT.CNRGALL	Complete		6021203490	Clinica
<input type="checkbox"/>	*****3366 SSN	Long, Sally	CRL.FFOX.NONTEST	Positive Dilute		CC11222211	Lab Ba
<input type="checkbox"/>	*****4440 SSN	Cleves, Anne	T0C.CUAT.REF1			CC44877844	Lab Ba

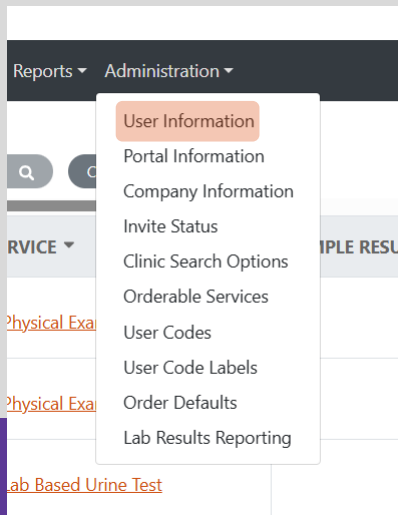
User Information

Select User Information from the Administration menu.

The User Information page displays all users within the portal(s) under the master portal.

Like the results grid, users can be sorted and filtered by column.

Use the Export CSV button to export a list of all portal users.

A screenshot of the 'User Information' page. At the top left is the 'CRL formfox Workforce' logo. A navigation bar contains links: Home, Result Exceptions 5, Randomization, Portals, Order, Site Search, Results, Reports, and Administration. On the right of the navigation bar are 'Gen 2 Pricing Portal' and 'Account'. Below the navigation bar are three buttons: 'Bulk Import Users', 'Add User', and 'EXPORT CSV'. The main content is a table with the following data:

Account	Login Name	User Name	Role	Last Login	Active/Inactive	Invite Sent	Enrollment Started	Invite Status
Gen 2 Pricing Portal/Example Company Inc	Benson.barry@email.com	Benson, Barry	Company Administrator		Active	08/01/2025	08/01/2025	Complete
Gen 2 Pricing Portal/Example Company Inc	Carter.thomas@email.com	Carter, Thomas	Company Administrator		Active	07/29/2025	07/29/2025	Complete
Gen 2 Pricing Portal/Example Company Inc	Sanchez.Juanita@email.com	Sanchez, Juanita	Program Administrator		Inactive	08/07/2024	08/08/2024	Complete
Gen 2 Pricing Portal/Example Company Inc	Long.sally@email.com	Long, Sally	Company Administrator		Active	03/19/2025	03/18/2025	Complete
Gen 2 Pricing Portal/Example Company Inc	Cleves.anne@email.com	Cleves, Anne	Company Administrator		Active	03/19/2025	03/18/2025	Complete

Edit User Information

Click on the user's login name to edit User Information.

From this screen, you can make a user as Inactive, Delete Role, and edit a user's Name and Phone Number.

Click **Reset Password** to send the user an email with a password reset link.

Toggle the button to turn on notifications about services.

Account ▾	Login Name ▾	User Name ▾	Role ▾	Last Login ▾ ↑	Active/Inactive ▾
Gen 2 Pricing Portal/Example Company Inc	Benson.barry@email.com	Benson, Barry	Company Administrator		Active

OUR TEAM'S INFORMATION ✕

Inactive

Login Name *

User's Email *

Personal Phone * Edit Phone Number

First Name * Reset Password

Last Name *

User's Role(s) * Delete Role

Should we notify you about services and events? No

Note: Your ability to receive a notification will depend on your access level. Contact your Administrator if you have questions about your access level.

Cancel/Close Update

Should we notify you about services and events? Yes

Note: Your ability to receive a notification will depend on your access level. Contact your Administrator if you have questions about your access level.

Services

REGULATED TESTING (DOT) (Urine)	<input checked="" type="radio"/> Yes
NON-REGULATED BREATH TESTING	<input checked="" type="radio"/> Yes
REGULATED PHYSICAL EXAM TESTING (DOT)	<input type="radio"/> No
AUDIOGRAM TESTING	<input type="radio"/> No
Clinical Health Service Blood (CHSBL)	<input type="radio"/> No
NON-REGULATED SALIVA TESTING	<input checked="" type="radio"/> Yes
NON-REGULATED PHYSICAL EXAM TESTING	<input checked="" type="radio"/> Yes
REGULATED BREATH TESTING (DOT)	<input type="radio"/> No
Pulmonary Function Test	<input type="radio"/> No

Add Single User

Select **Add User** to add a user to the portal.

Fill in the user's information.
Select the **User's Role**.

Select the user's **Company**. The company must already be created in the portal.

Turn on notification for services, if needed.

Select **Save** to Add the user.

CRL Workforce

Home Result Exceptions 5 Randomization Portals Order Site Search Results Reports Administration Gen 2 Pricing Portal Account

Bulk Import Users Add User EXPORT CSV

Account	Login Name	User Name	Role	Last Login	Active/Inactive	Invite Sent	Enrollment Started	Invite Status
Gen 2 Pricing Portal/Example Company Inc	Benson.barry@email.com	Benson, Barry	Company Administrator		Active	08/01/2025	08/01/2025	Complete
Gen 2 Pricing Portal/Example Company Inc							07/29/2025	Complete
Gen 2 Pricing Portal/Example Company Inc							08/08/2024	Complete
Gen 2 Pricing Portal/Example Company Inc							03/18/2025	Complete
Gen 2 Pricing Portal/Example Company Inc							03/18/2025	Complete

OUR TEAM'S INFORMATION

Inactive

User's Email *
Email is available

Personal Phone * Edit Phone Number

First Name * Reset Password

Last Name * Delete Role

User's Role(s) *

Company *

Locations *

Should we notify you about services and events? No

Note: Your ability to receive a notification will depend on your access level. Contact your Administrator if you have questions about your access level.

Cancel/Close Save

Add User

An email will automatically be sent to invite the user to Activate their account.

After clicking the **Activate Account** link, the user will be sent a **PIN** to their selected method of communication.

The user will enter the PIN on the next screen and then be asked to set up their password.

Once logged in, the user should bookmark their Workforce portal URL.

ENTER YOUR PIN

We are sending you a PIN. Please enter that PIN below:

[I didn't receive my PIN!](#) [Back](#) [Resend](#) [Cancel](#)

Hi,

You have been invited to use FormFox WorkForce to help manage your workplace drug and occupational health program. FormFox WorkForce enables users to quickly and easily:

- Order testing services
- Track the status of services
- View results
- Find testing sites
- Manage random programs

To get started, please click on the link below within 48 hours as it will expire after this time:

[Activate Account](#)

If your link expires follow the instructions on the screen to request a new link. You should be good to go.

Happy Testing

The FormFox Team

<http://www.formfox.com>



HOW SHOULD WE CONTACT YOU

To proceed, we need to provide you with a PIN:

Your information: **Phone:** 555-555-5555
eMail: newuser@examplecompany.com

Please indicate how we should contact you:

By eMail Via Text Message By Voice

[Send](#)

*** Message and data rates may apply. 1 message per user request. For terms: <https://www.formfox.com/SMSGTermsOfService>. For privacy: <https://www.formfox.com/PrivacyPolicy>. Text HELP to 52141 for help. Text STOP to 52141 to stop receiving texts. ***

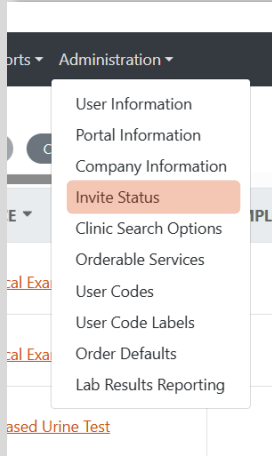
Check User Invite Status

If the new user does not receive their portal invite email, navigate to the **Invite Status** page.

Like the results grid, the **Invite Status** page displays information in sortable grids.

Locate the user based on the company, email address, and when the invite was sent.

Click on the email address to edit the email or phone number for the invitation. You can also **Resend Invitation** or **Delete Invitation**.

A screenshot of the 'Invite Status' page in a web application. The page has a dark header with navigation links like Home, Result Exceptions, Randomization, Portals, Order, Site Search, Results, Reports, and Administration. The main content is a table with columns for Company, Role, Email Address, Invite Sent, Enrollment Started, Invite Status, and Active/Inactive. The 'Email Address' column is highlighted in orange for the first row.

Company	Role	Email Address	Invite Sent	Enrollment Started	Invite Status	Active/Inactive
Gen 2 Pricing Portal / Kim Company	Company Administrator	Benson.barry@email.com	04/17/2026		Pending	Active
Gen 2 Pricing Portal / Kim Company	Location Administrator	Carter.thomas@email.com	04/17/2026		Expired	Active
Gen 2 Pricing Portal / Jim's Car Shop	Company Administrator	Sanchez.Juanita@email.com	04/08/2026	04/03/2026	Company Configured	Active
Gen 2 Pricing Portal / Jim's Car Shop	Company Administrator	Long.sally@email.com	04/08/2026	01/12/2026	Company Configured	Active
Gen 2 Pricing Portal / Jim's Car Shop	Company Administrator	Cleves.anne@email.com	04/08/2026	08/29/2025	Company Configured	Active

A screenshot of a modal window titled 'Resend/Delete Invitation'. The modal has a close button (X) in the top right corner. It contains two input fields: 'Email Address *' with the value 'Benson.barry@email.com' and 'Personal Phone *' with the value '555-555-5555'. Below the phone number field is a note: 'This phone number will be used to validate the Administrator. Please provide a direct number or mobile number (not a main company number or extension)'. At the bottom of the modal are three buttons: 'Delete Invitation' (orange), 'Resend Invitation' (orange), and 'Cancel' (grey).

Import Multiple Users

Before importing, set up the first user with the Add User button.

Select Bulk Import Users button.

Download an example spreadsheet and fill in the required info for new users.

Save the spreadsheet as a CSV file.

Select Browse and Upload Spreadsheet to upload the file.

Each user will receive a link to finish activating their account.

The screenshot shows the CRL Workforce user management interface. At the top, there is a navigation bar with the CRL Workforce logo and a menu with items: Home, Result Exceptions (5), Randomization, Portals, Order, Site Search, Results, Reports, and Administration. On the right side of the navigation bar, there are links for 'Gen 2 Pricing Portal' and 'Account'. Below the navigation bar, there are three buttons: 'Bulk Import Users' (highlighted in orange), 'Add User', and 'EXPORT CSV'. The main content area displays a table of users with the following columns: Account, Login Name, User Name, Role, Last Login, Active/Inactive, Invite Sent, Enrollment Started, and Invite Status. The table contains five rows of user data. A modal window titled 'USER INVITE BULK UPLOAD' is overlaid on the table. The modal contains the following text: 'To send an invitation to multiple companies at once: 1. Create a Spreadsheet with the following columns: A. Company Name, B. User's First Name, C. User's Last Name, D. User's Email Address, E. User's Phone Number, F. User's Role. 2. Save the spreadsheet as a CSV text file. 3. Upload the file here.' The modal also features a 'Download Example Spreadsheet' button, a 'Browse' button, a 'Cancel' button, and an 'Upload Spreadsheet' button.

Account	Login Name	User Name	Role	Last Login	Active/Inactive	Invite Sent	Enrollment Started	Invite Status
Gen 2 Pricing Portal/Example Company Inc	Benson.barry@email.com	Benson, Barry	Company Administrator		Active	08/01/2025	08/01/2025	Complete
Gen 2 Pricing Portal/Example Company Inc	Carter.thomas@email.com	Carter, Thomas	Company Administrator		Active	07/29/2025	07/29/2025	Complete
Gen 2 Pricing Portal/Example Company Inc	Sanchez.Juanita@email.com	Sanchez, Juanita	Program Administrator		Inactive	08/07/2024	08/08/2024	Complete
Gen 2 Pricing Portal/Example Company Inc	Long.sally@email.com	Long, Sally	Company		Active	03/19/2025	03/18/2025	Complete
Gen 2 Pricing Portal/Example Company Inc	Cleves.anne@email.com						03/18/2025	Complete

USER INVITE BULK UPLOAD

To send an invitation to multiple companies at once:

1. Create a Spreadsheet with the following columns:
 - A. Company Name
 - B. User's First Name
 - C. User's Last Name
 - D. User's Email Address
 - E. User's Phone Number
 - F. User's Role
2. Save the spreadsheet as a CSV text file.
3. Upload the file here.

[Download Example Spreadsheet](#)

[Browse](#)

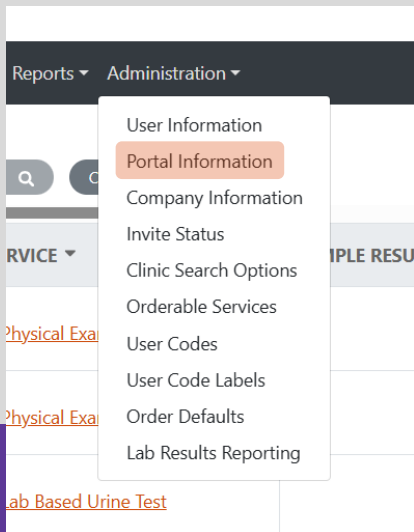
[Cancel](#) [Upload Spreadsheet](#)

Portal Information

Select Portal Information from the Administration menu. From the Portal Information page, the organization information can be edited.

This is the information that displays on non-Marketplace authorization forms in the "Who to Bill" section.

There is an option to add a Logo to the Workforce portal. This logo will display in the top-left corner of the portal.



EDIT MY ORGANIZATION

Organization Name *

Street Address 1 *

Street Address 2

City *

State * ZIP *

Office Phone # *

Are you a Third-Party Administrator? Yes No

URL of Portal Site

Lab Accounts *

Add corporate Logo to Workforce Portal
Ideal logo size should be 200 by 100 pixels and .jpg, .jpeg, .gif, .png file type

Add corporate Logo for MRO Results
This option is only available for results reviewed by a Red Arrow integrated MRO

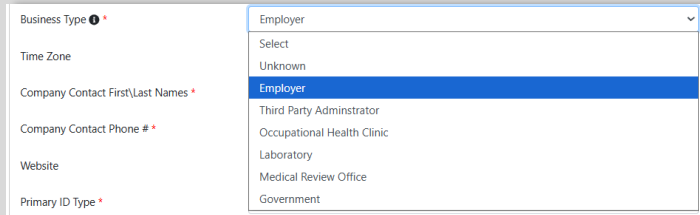
Allow full Donor ID to print on CSV Export

Add New Company

Step 1:

From the Portal Information page, Select **Add Company** to add a company to the portal.

Fill in the company's information.
Select the **Business Type**.

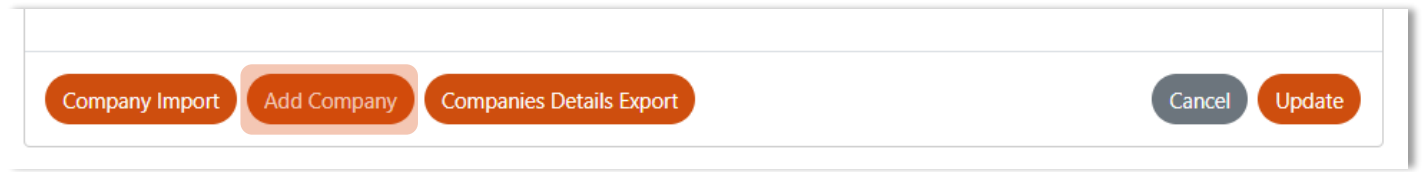


A screenshot of a web form showing a dropdown menu for 'Business Type'. The menu is open, displaying several options: 'Employer' (highlighted in blue), 'Select', 'Unknown', 'Third Party Administrator', 'Occupational Health Clinic', 'Laboratory', 'Medical Review Office', and 'Government'. To the left of the dropdown, there are labels for other fields: 'Business Type *', 'Time Zone', 'Company Contact First\Last Names *', 'Company Contact Phone # *', 'Website', and 'Primary ID Type *'.

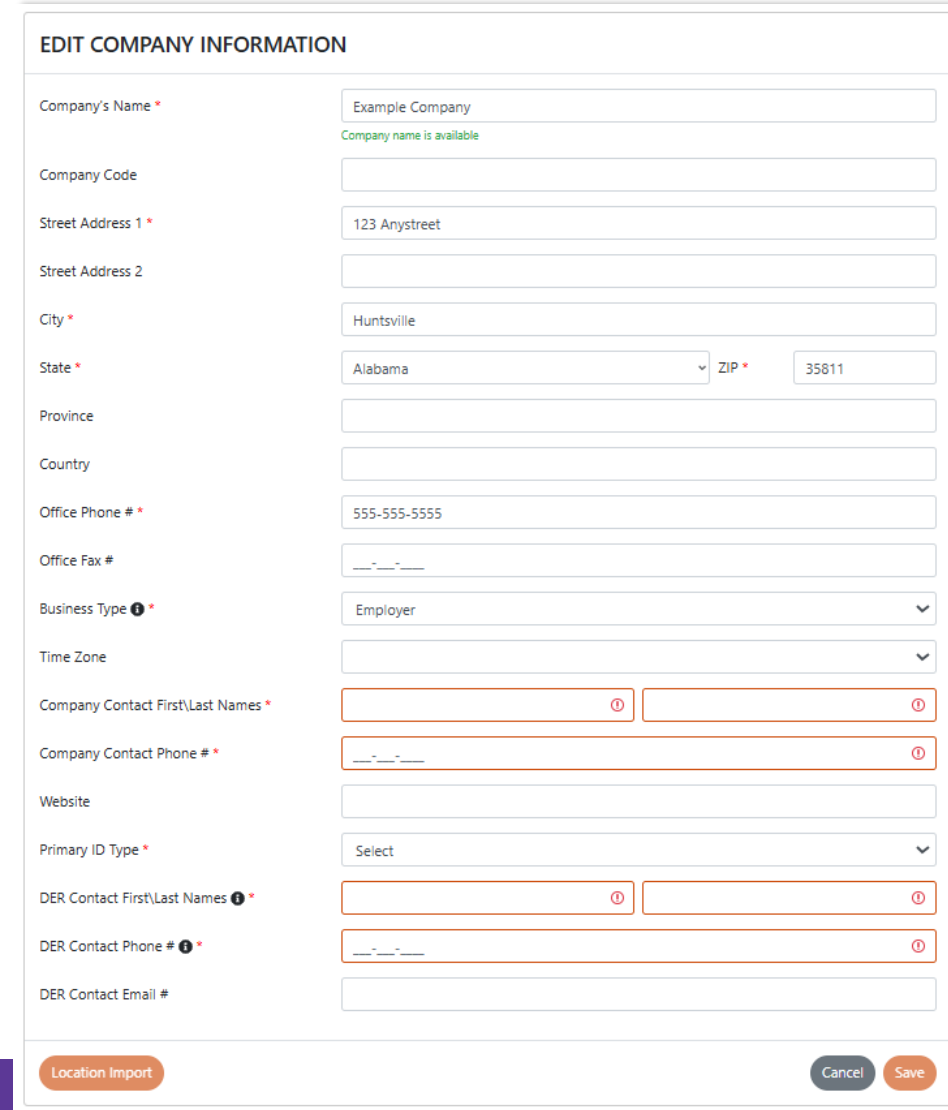
Fill in the company's DER contact information.

Select **Save** to Add the company.

Next, add lab accounts to the company. A company must have lab accounts set up to be able to place orders.



A horizontal navigation bar with five buttons: 'Company Import', 'Add Company', 'Companies Details Export', 'Cancel', and 'Update'. The 'Add Company' button is highlighted with a light orange background.



A screenshot of the 'EDIT COMPANY INFORMATION' form. The form contains the following fields and values:

- Company's Name *: Example Company (with a green message: 'Company name is available')
- Company Code: (empty)
- Street Address 1 *: 123 Anystreet
- Street Address 2: (empty)
- City *: Huntsville
- State *: Alabama (dropdown), ZIP *: 35811
- Province: (empty)
- Country: (empty)
- Office Phone #: 555-555-5555
- Office Fax #: (empty)
- Business Type *: Employer (dropdown)
- Time Zone: (empty)
- Company Contact First\Last Names *: (empty)
- Company Contact Phone #: (empty)
- Website: (empty)
- Primary ID Type *: Select (dropdown)
- DER Contact First\Last Names *: (empty)
- DER Contact Phone #: (empty)
- DER Contact Email #: (empty)

At the bottom of the form, there are three buttons: 'Location Import', 'Cancel', and 'Save'.

Add New Company

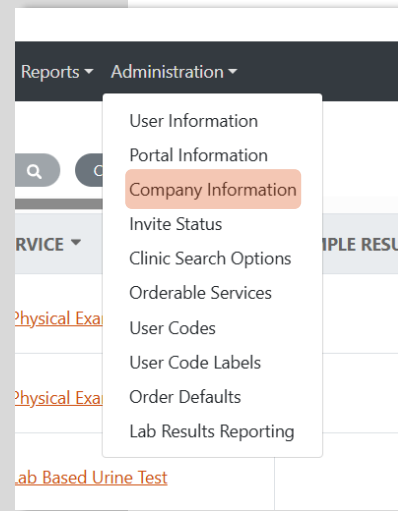
Step 2:

Select Company Information from the Administration Menu.

Under Company, search for the company name.

Click Lab Account Details to add accounts to the company profile.

Click Add New to Add a new account number.



EDIT COMPANY INFORMATION

Company (Account ID: 5728978) *

Company Code

Street Address 1 *

Street Address 2

City *

State * ZIP *

Province

Country

Office Phone # *

Office Fax #

Time Zone

Company Contact First/Last Names *

Company Contact Phone # *

Website

Lab Accounts * Lab Account Not Required

Primary ID Type *

DER Contact First/Last Names ⓘ *

DER Contact Phone # ⓘ *

DER Contact Email #

LAB ACCOUNTS

Company

Active Lab Accounts	Hide On Order
CRL.DOTW.DOTTEST	<input type="checkbox"/>
CRL.FFOX.POCTEST	<input type="checkbox"/>
QZZ.CHEM.REF1	<input type="checkbox"/>
QZZ.CHM1.REF1	<input type="checkbox"/>
QZZ.DOT1.REF1	<input type="checkbox"/>
QZZ.FLX1.DEFNON	<input type="checkbox"/>
QZZ.FLX1.REF1	<input type="checkbox"/>
QZZ.NON1.REF1	<input type="checkbox"/>

Inactive Lab Accounts

- CRL.FFOX.BRENDA
- GSP.DEMO.REF1

Add Lab Accounts

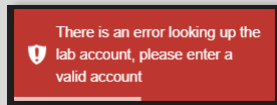
Select the Lab.

Enter the Lab Account.

Click **Check** account to verify. The account must already be in the lab's system to be validated. One test panel set up under the account will be displayed and a green box with **Lab Account Found** will pop up.

Click **Submit** to add.

Invalid accounts will show a red box.



Use the **arrows** to move accounts between Active Lab Accounts and Inactive Lab Accounts.

A screenshot of a web form titled "LAB ACCOUNT SELECTION". The form has a white background and is set against a dark grey background. At the top right, there is a green notification box with a white checkmark and the text "Lab Account Found.". The form contains the following elements: a heading "LAB ACCOUNT SELECTION", a sub-heading "Please select your lab and then enter your lab account", a dropdown menu for "Select your Lab *" with "CRL" selected, a text input field for "Lab Account *" containing "CRL.FFOX.BRENDA", a second text input field containing "W324", a "Check Account" button, an "Upload Spreadsheet" button, a "Cancel" button, and a "Submit" button.A screenshot of a web interface titled "LAB ACCOUNTS". At the top, there is a "Company" dropdown menu set to "Matt's Signs". Below this, there are two main sections: "Active Lab Accounts" and "Inactive Lab Accounts". The "Active Lab Accounts" section contains a list with one entry: "CRL.FFOX.BRENDA" and a "Hide On Order" checkbox. Between the two sections are four orange arrow buttons: a double right arrow, a single right arrow, a single left arrow, and a double left arrow. At the bottom right, there are three buttons: "Cancel", "Add New", and "Submit". The word "Website" is visible in the bottom left corner of the interface.

Add Multiple Lab Accounts

Use the Upload Spreadsheet button to add multiple lab accounts at once.

Download an Example Spreadsheet.

Open the spreadsheet and fill in the columns Laboratory and Lab Code. Save the CSV.

	A	B	C
1	Lab	Lab Account	
2	CRL	QZZ.DOT1	
3	CRL	QZZ.NON1	
4			
5			
6			
7			

Click Browse to find the file and click Upload Spreadsheet.

Once the file uploads, the accounts will be listed in Active Lab Accounts.

LAB ACCOUNT SELECTION

Please select your lab and then enter your lab account

Select your Lab *

Lab Account *

LAB ACCOUNT CLINIC LABORATORY BULK UPLOAD

Please select your lab

Select your Lab *

Lab Account *

To create multiple lab codes for a company at once:

1. Create a Spreadsheet with the following columns:
 - A. Laboratory (CRL)
 - B. Lab Code
2. Save the Spreadsheet as a CSV text file.
3. Upload the file here.

LAB ACCOUNTS

Company

Active Lab Accounts Hide On Order

QZZ.DOT1

QZZ.NON1

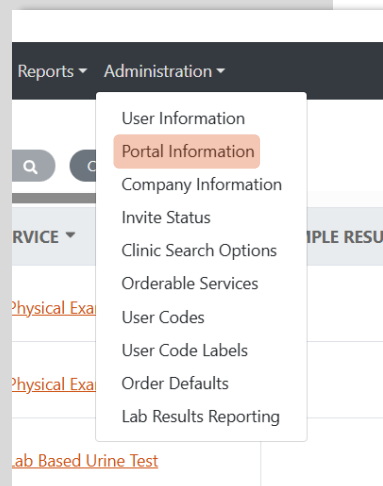
Inactive Lab Accounts

CRL.FFOX.BRENDA

Add Multiple Companies

From the Portal Information page, select Company Import.

Download an Example Spreadsheet and fill in the required information for each company, including lab account numbers.



Save the CSV. Select Choose File to upload the file.

A preview of the spreadsheet information will be shown. Click Submit for Validation.

Add corporate Logo for MKO Results Browse

This option is only available for results reviewed by a Red Arrow integrated MRO

Allow full Donor ID to print on CSV Export

Company Import Add Company Companies Details Export Cancel Update

COMPANY IMPORT

UPLOAD FILE

Import CSV File [Download Example Spreadsheet](#)

Upload file: No file chosen

RESET CANCEL NEXT

COMPANY IMPORT

PREVIEW

Company Name	Company Code	Address 1	Address 2	City	State	Zip	Province	Country	Phone	Fax	Web Site URL	Time Zone	Company Contact First Name	Company Contact Last Name	Company Contact Phone	Lab Code
Jane's Cookies		123 Main St.		Park City	UT	84060			555-555-5555			MDT	Jane	Doe	555-555-5555	
Jim's Car Shop		123 Elm St.		Carthage	MO	64836			555-555-5555			MDT	Jim	Jones	555-555-5555	

BACK SUBMIT FOR VALIDATION

Add Multiple Companies

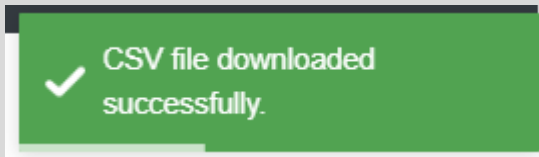
Errors will be shown for any missing or invalid fields.

The same account code cannot be used in multiple company portals.

Correct errors and re-upload the CSV file.

Once all information is complete, select Import.

A message will display in green once the CSV file is successfully imported.



COMPANY IMPORT

IMPORT FILE VALIDATION

Import file validation: (0 of 2 have errors)

Line #	Validation errors and warnings	Company Name	Company Code	Address1	Address2	City	State	Zip Code	Province	Country	Phone	Fax	Web Site URL	Time Zone	Company Contact First Name	Company Contact Last Name	Company Contact Phone	Lab Code	Lab Account Number	DER Contact First Name	DER Contact Last Name	DER Contact Phone	DER Contact Email
2	Warnings (2): Field 'Company Name': Company Jane's Cookies	Jane's Cookies		123 Main St.		Park City	UT	84060			555-555-5555			MDT	Jane	Doe	555-555-5555			Jane	Doe	555-555-5555	Jane@Janescokies.com

COMPANY IMPORT

IMPORT FILE VALIDATION

Company Name	Company Code	Address 1	Address 2	City	State	Zip	Province	Country	Phone	Fax	Web Site URL	Time Zone	Company Contact First Name	Company Contact Last Name	Company Contact Phone	Lab Code
Jane's Cookies		123 Main St.		Park City	UT	84060			555-555-5555			MDT	Jane	Doe	555-555-5555	
Jim's Car Shop		123 Elm St.		Carthage	MO	64836			555-555-5555			MDT	Jim	Jones	555-555-5555	

BACK CANCEL IMPORT

Edit Company Information

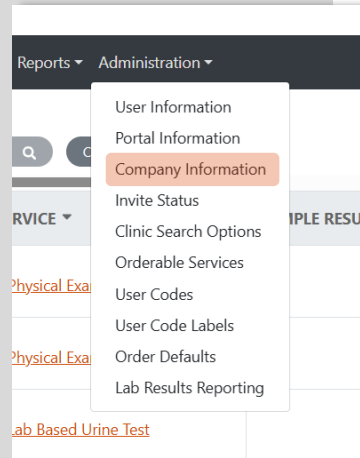
From the Company Information page, Search for a name in the Company Field.

Click on the Company Name to see the Company's Information.

Click any field to edit the listed information.

Click **Update** at the bottom of the page to save changes.

You can also make a company inactive from this page. Click **Inactivate** at the bottom of the page. Inactive companies can still be found in the portal but will be not available for orders.



EDIT COMPANY INFORMATION

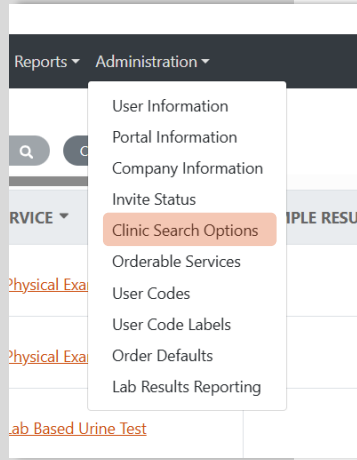
Company (Account ID: 5728978) *	<input type="text" value="Example Company Inc"/>
Company Code	<input type="text" value="FOXU01767"/>
Street Address 1 *	<input type="text" value="7654 2nd Street SE"/>
Street Address 2	<input type="text"/>
City *	<input type="text" value="Hudson"/>
State *	<input type="text" value="Wisconsin"/> ZIP * <input type="text" value="87897"/>
Province	<input type="text"/>
Country	<input type="text"/>
Office Phone # *	<input type="text" value="555-555-5555"/>
Office Fax #	<input type="text" value="___-___-___"/>
Time Zone	<input type="text"/>
Company Contact First\Last Names *	<input type="text" value="John"/> <input type="text" value="Doe"/>

DER Contact Email #	<input type="text"/>
Locations	<input type="button" value="Locations"/>

Clinic Search Options

The Clinic Search Options page allows a portal admin to set search options and defaults for orders. Once set, these options will apply to all companies in the portal.

Admins can adjust the default search radius, what type clinics are displayed, price tier display order, and whether only Marketplace enabled Sites are shown.



Clinic Search Options/Default

Default

Primary Exclusion List

Radius Defaults

Minimum (Miles) Integer between 1 and 99 (inclusive)

Maximum (Miles) Integer greater than minimum and no more than 99

Marketplace Sites Only

Primary Clinics

Display Primary Clinics First
Only Primary clinics will be displayed; otherwise the full list of clinics that were found will be displayed.

Display Primary Clinics Only
Only the Primary clinics will be displayed.

Price Tier Display Order

In NetworkTier 2	<input type="checkbox"/> Exclude
In NetworkTier 1	<input type="checkbox"/> Exclude
In NetworkTier 3	<input type="checkbox"/> Exclude
Out Of Network - Marketplace Location	<input type="checkbox"/> Exclude
In Network	<input type="checkbox"/> Exclude

When searching for clinic you can set a minimum and maximum radius default.

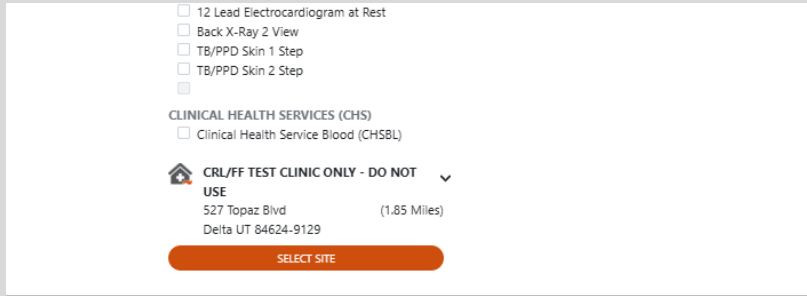
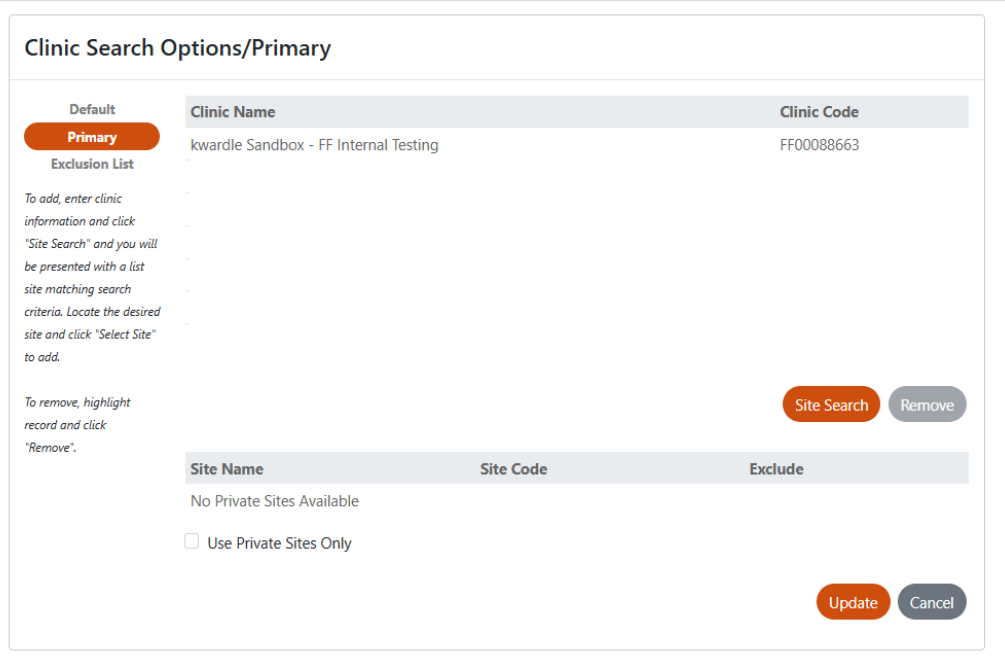
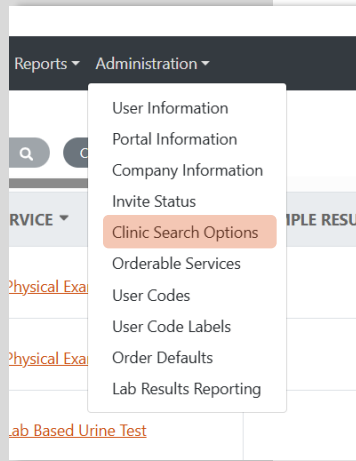
Drag and drop Tier to set the sort order for Tier to be displayed.

Clinic Search Options

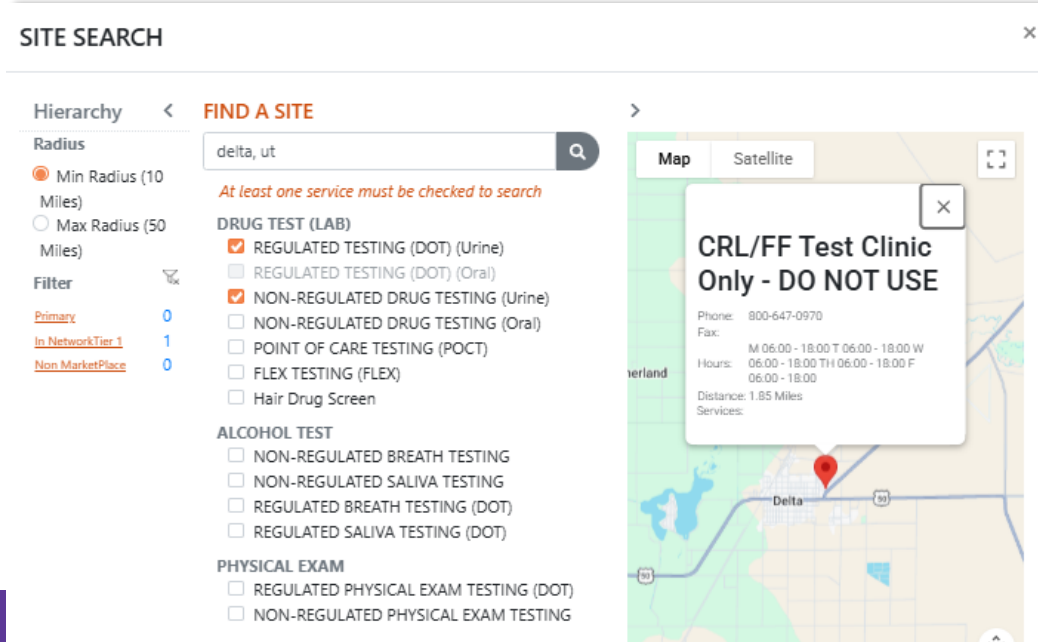
Click the **Primary** tab for additional options. Here, Portal Admins can select a Primary site.

Click the **Site Search** button. Select services from the list and search for the clinic location.

Click **Select Site** to add the Primary Site.



Admins can also set **Private Sites**. Reach out to Workforce Support for help with private sites.



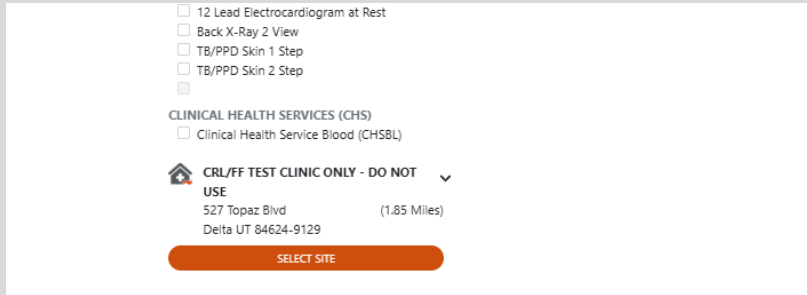
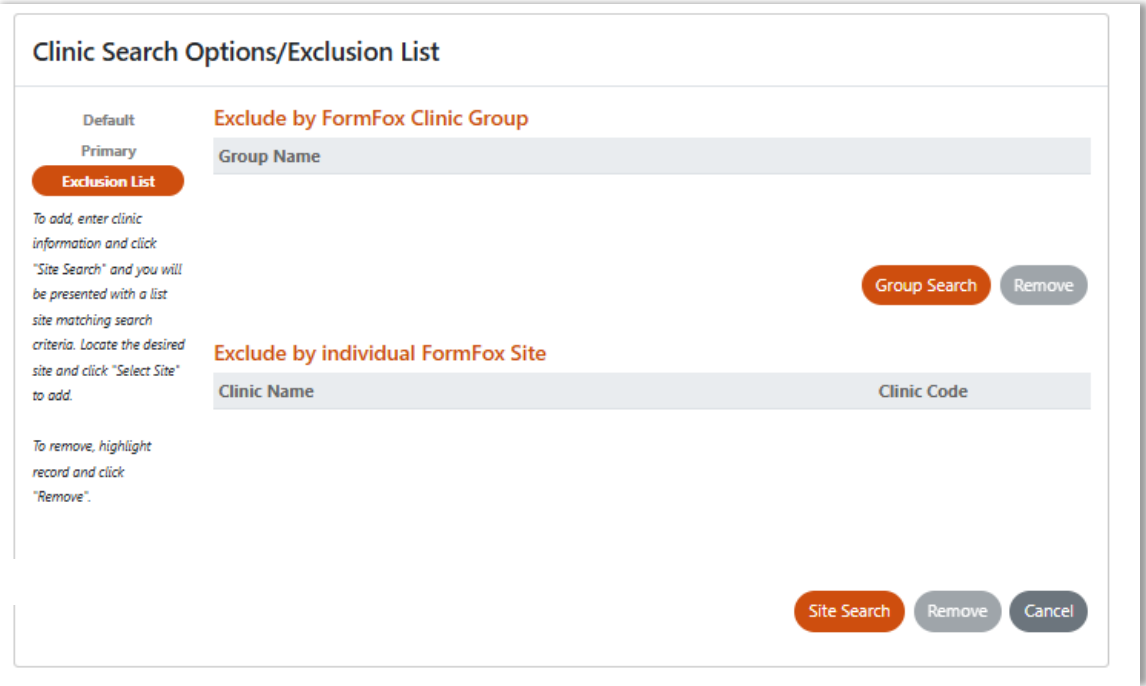
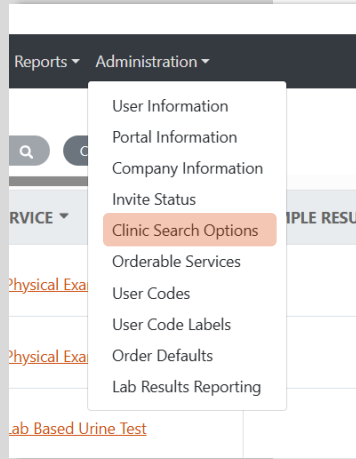
Clinic Search Options

Click the Exclusion List tab for additional options. Admins can also elect to Exclude Clinic Groups or Individual Sites.

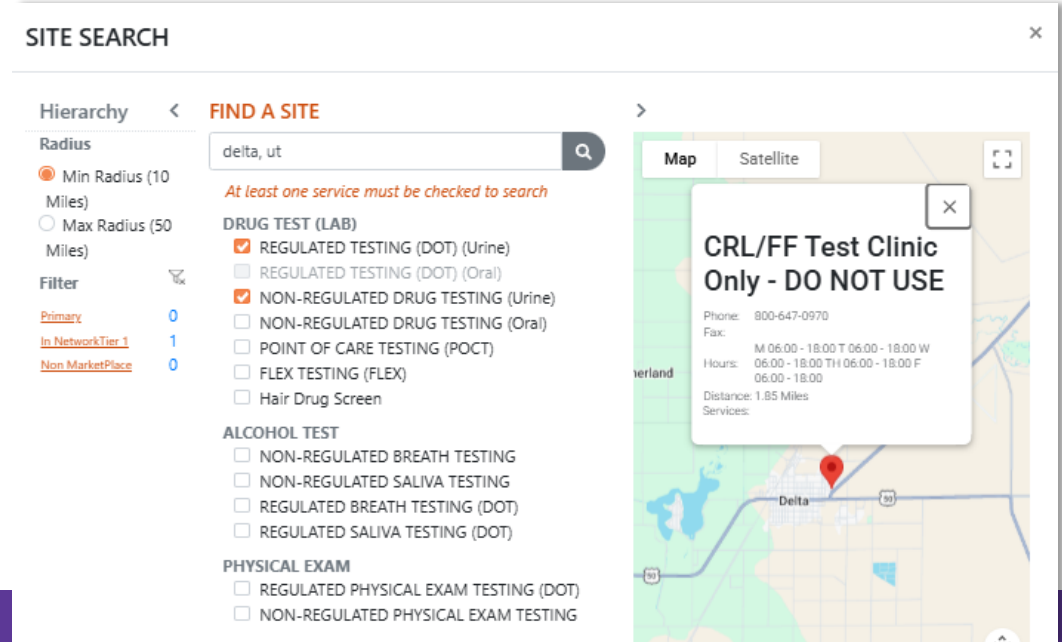
Click the Group Search or Site Search button.

Select services from the list and search for the group or site.

Click Select Site to add the Exclusion List.



These options will apply to all systems under the master portal.



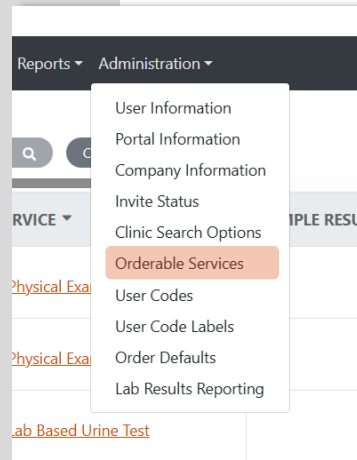
Orderable Services

The Orderable Services page dictates what services can and can't be ordered by customers.

The **Orderable** column shows the available services. In order for a service to be turned on, it must be included in the contract negotiated with CRL and activated by internal CRL staff.

The **Default** column can be used to turn off specific services. If removed from the Default, that service will be shown as "not orderable".

Click **Update** to save changes.



ORDERABLE SERVICES		
Select Company		
Service Name	Orderable	Default
REGULATED TEST (Urine)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
REGULATED TEST (Oral)	<input type="checkbox"/>	<input type="checkbox"/>
NON-REGULATED TEST (Urine)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NON-REGULATED TEST (Oral)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
POINT OF CARE TEST (POCT)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FLEX TEST (FLEX)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hair Drug Screen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Breath	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Saliva	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Regulated Breath	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Regulated Saliva	<input checked="" type="checkbox"/>	<input type="checkbox"/>
REGULATED PHYSICAL EXAM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NON-DOT/NON REGULATED PHYSICAL EXAM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AUDIOGRAM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lift test 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lift test 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Kraus Weber	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12 Lead Electrocardiogram at Rest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Back X-Ray 2 View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TB/PPD Skin 1 Step	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TB/PPD Skin 2 Step	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
Clinical Health Service Blood	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Order Defaults

The Order Defaults page is used to set and limit various fields during ordering.

These defaults can be set per company. First, search for the company name.

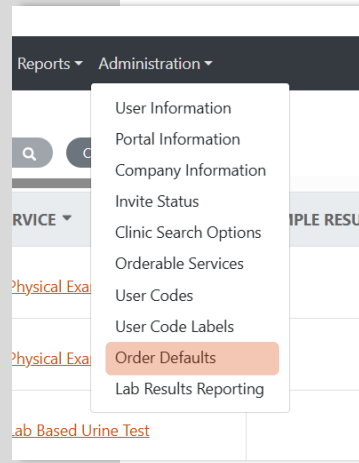
Choose an Order Field from the list.

Select which options will Show and which to Make Default.

Click Update to save changes.

Order defaults can be set for:

- Regulatory Mode
- Reason
- Hours Until Order Expires
- FAA Employee Category
- Regulated Drug Test Sample Type
- Non-Regulated Drug Test Sample Type

A screenshot of the 'ORDER DEFAULTS' form. The 'Company' dropdown is set to 'Example Company Inc'. The 'Order Field' dropdown is open, showing a list of options: Select, Select, Regulatory Mode (highlighted in blue), Reason, Hours Until Order Expires, FAA Employee Category, Regulated Drug Test Sample Type, and Non-Regulated Drug Test Sample Type.A screenshot of the 'ORDER DEFAULTS' form showing a table of field values and checkboxes for 'Show' and 'Make Default'. The 'Company' dropdown is set to 'Example Company Inc' and the 'Order Field' dropdown is set to 'Regulatory Mode'.

Field Value	Show	Make Default
FAA	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FMCSA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRA	<input type="checkbox"/>	<input type="checkbox"/>
FTA	<input type="checkbox"/>	<input type="checkbox"/>
HHS	<input type="checkbox"/>	<input type="checkbox"/>
NRC	<input type="checkbox"/>	<input type="checkbox"/>
PHMSA	<input type="checkbox"/>	<input type="checkbox"/>
USCG	<input type="checkbox"/>	<input type="checkbox"/>

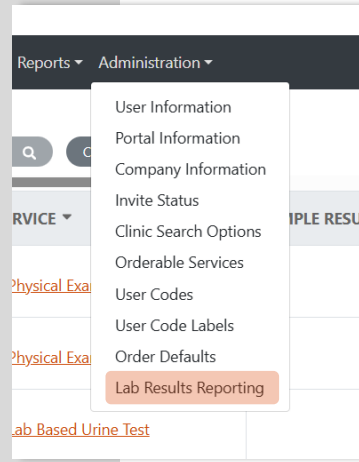
Reset Defaults Update Cancel

Lab Results Reporting

To ensure accuracy, the Lab Results Reporting page tells the system what confirmations and results are required.

To make changes, select the company name from the drop-down list, check or uncheck the appropriate box and click Update.

If you are having issues with seeing results, check here to ensure the correct settings are chosen.



LAB RESULTS REPORTING

Example Company Inc

For non-federal lab-based testing:	
Require MRO for negative tests	<input checked="" type="checkbox"/>
Require MRO for non-negative tests	<input checked="" type="checkbox"/>
For POCT or 'instant' testing:	
Require laboratory confirmation for non-negative screens	<input checked="" type="checkbox"/>
Require MRO for laboratory non-negative confirmations	<input checked="" type="checkbox"/>