SoftWeb*plus*™

End User Manual

Version	Date	Author	Rationale
0.1	30 July 2021	SCC	Initial document
0.2	31 August 2021	Sharafat(Sherry) Hussain	Updated/Added steps with more descriptions and screenshots.
0.3	11 September 2021	Sharafat(Sherry) Hussain	Refinements
0.4	20 October 2021	Sharafat(Sherry) Hussain	Additional features
0.5	31 January 2022	Sharafat(Sherry) Hussaain	Refinements and additional features
0.6	20 February 2022	Ayaz Ahmad	Document reviewed

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User Log-in:

Access SoftWebplus via a browser at:

https://ccllabs.com >>> Click Client Portal Login:

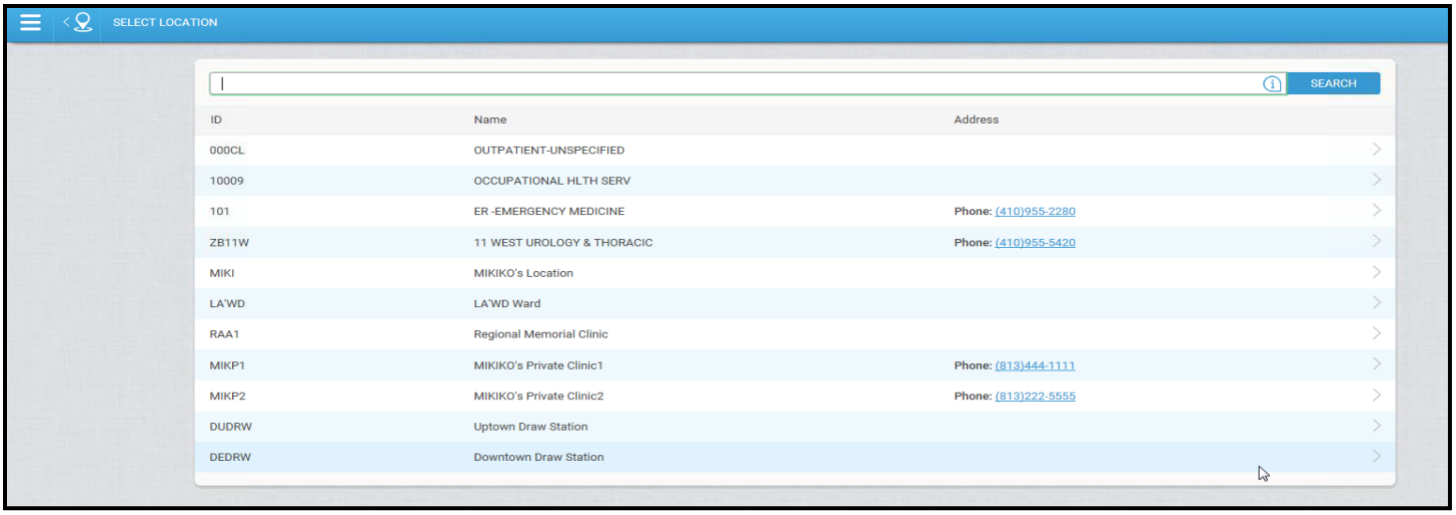
OR

https://portal.ccllabs.com

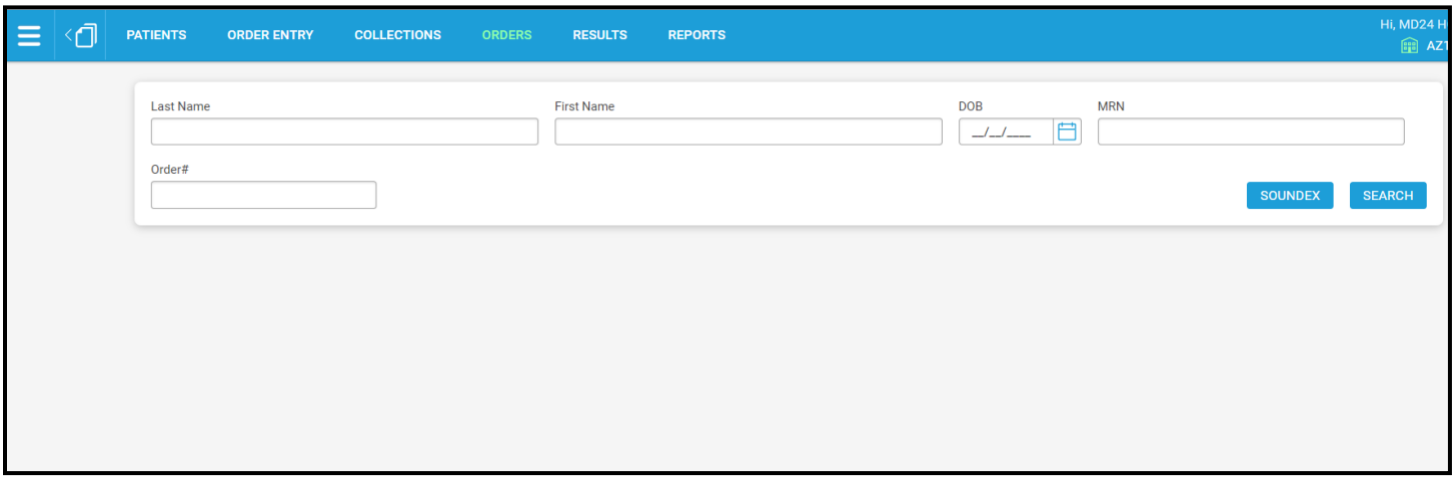
1. Log in using your unique User ID and Password. (Your User ID and Password is provided by Central Clinical Labs) If you DO NOT have ID/Password, reach out to CCL Labs by calling your respective location.
2. Click/Enter on the

button:

   a. Highlight or enter your location ID and hit enter (If you have access to multiple Clinics/Facilities):

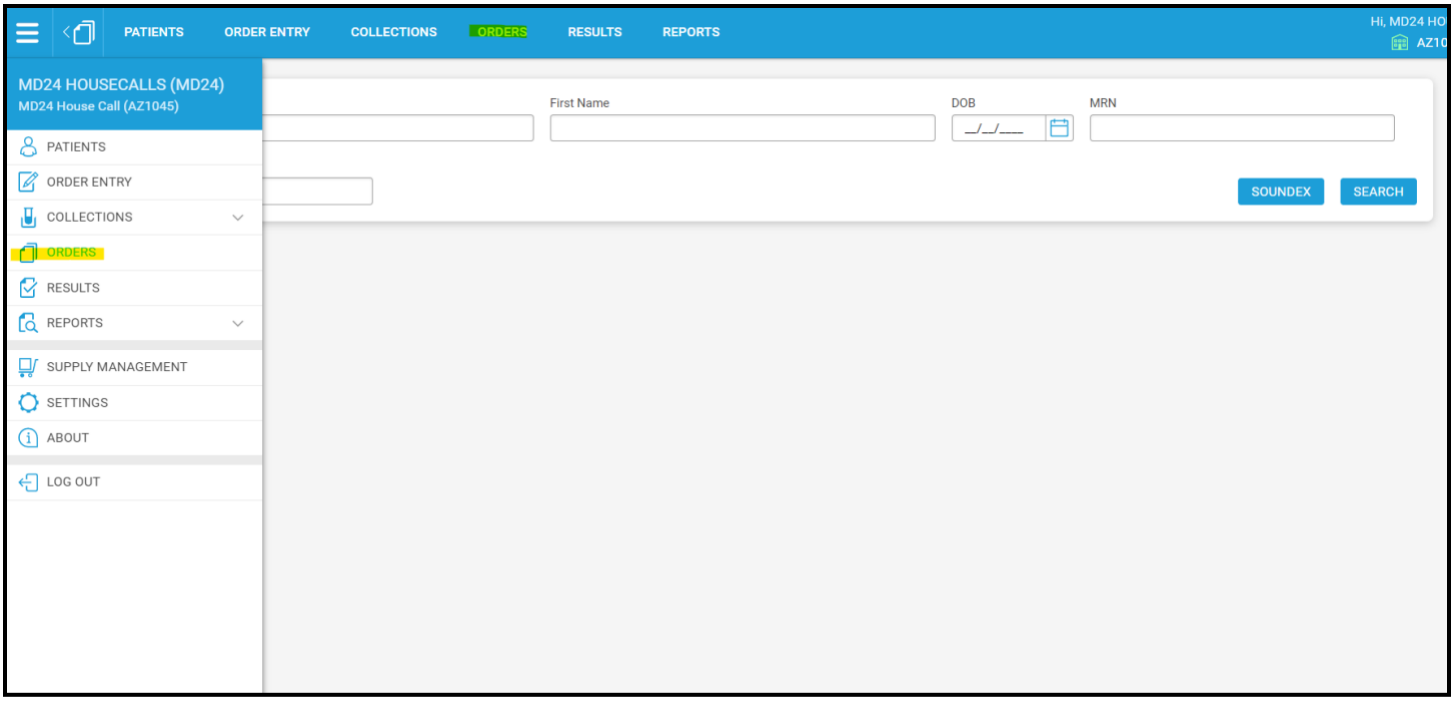


b. Otherwise, you will reach ORDERS page:

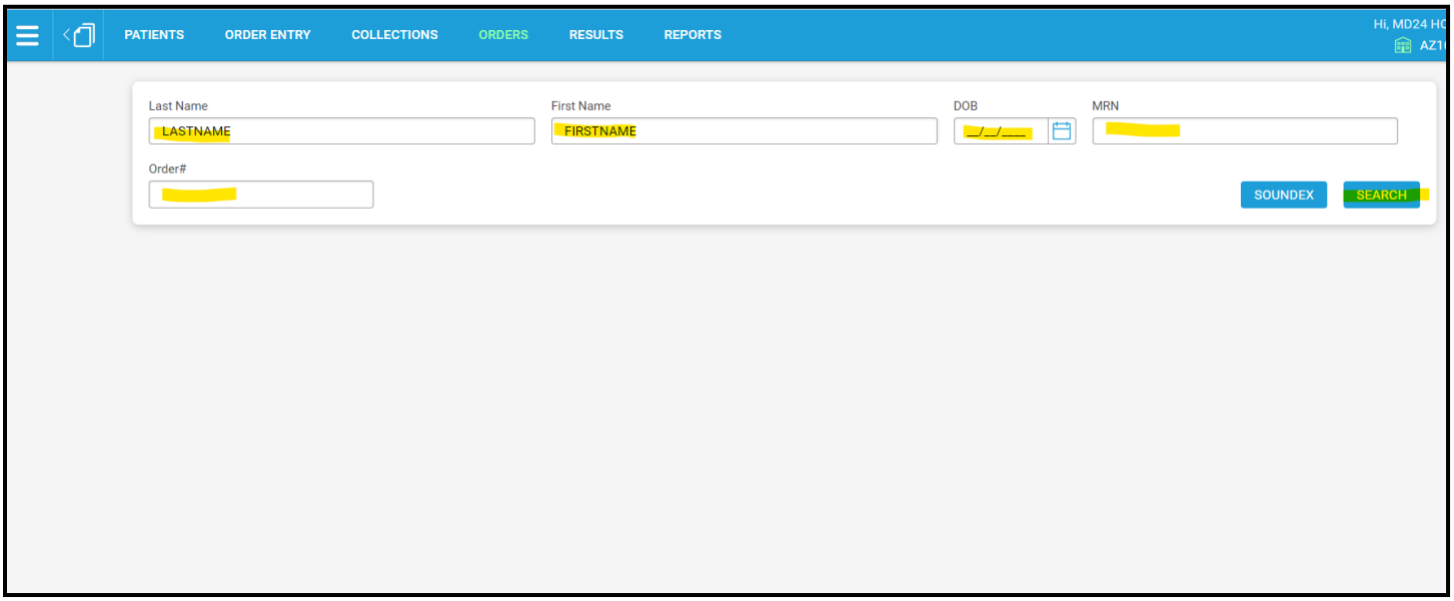


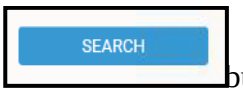
Create a New Patient:

1. Select the ORDERS from menu bar (or ORDERS from side bar).

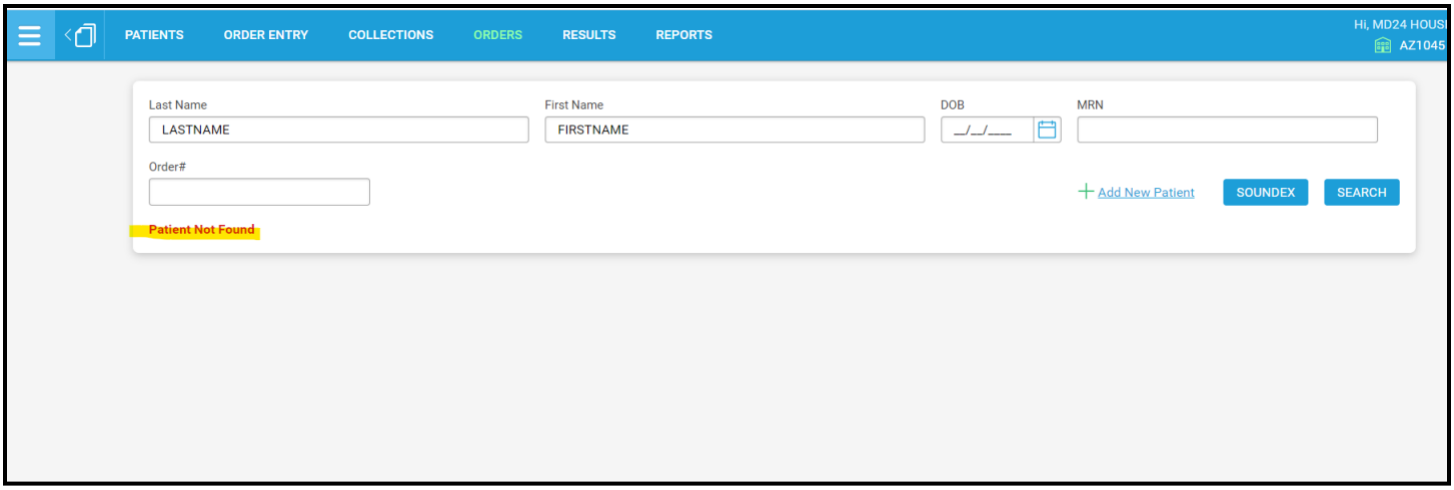


2. Enter the patient information (one or all) into the search field. CCL recommends always searching by Patient Date of Birth

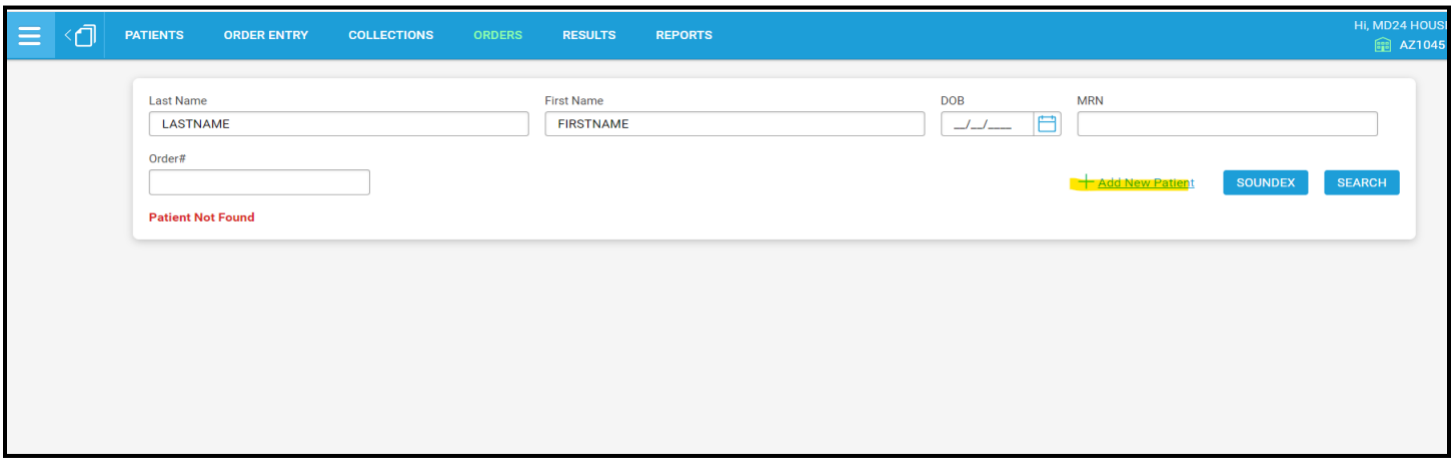


3. Select the 

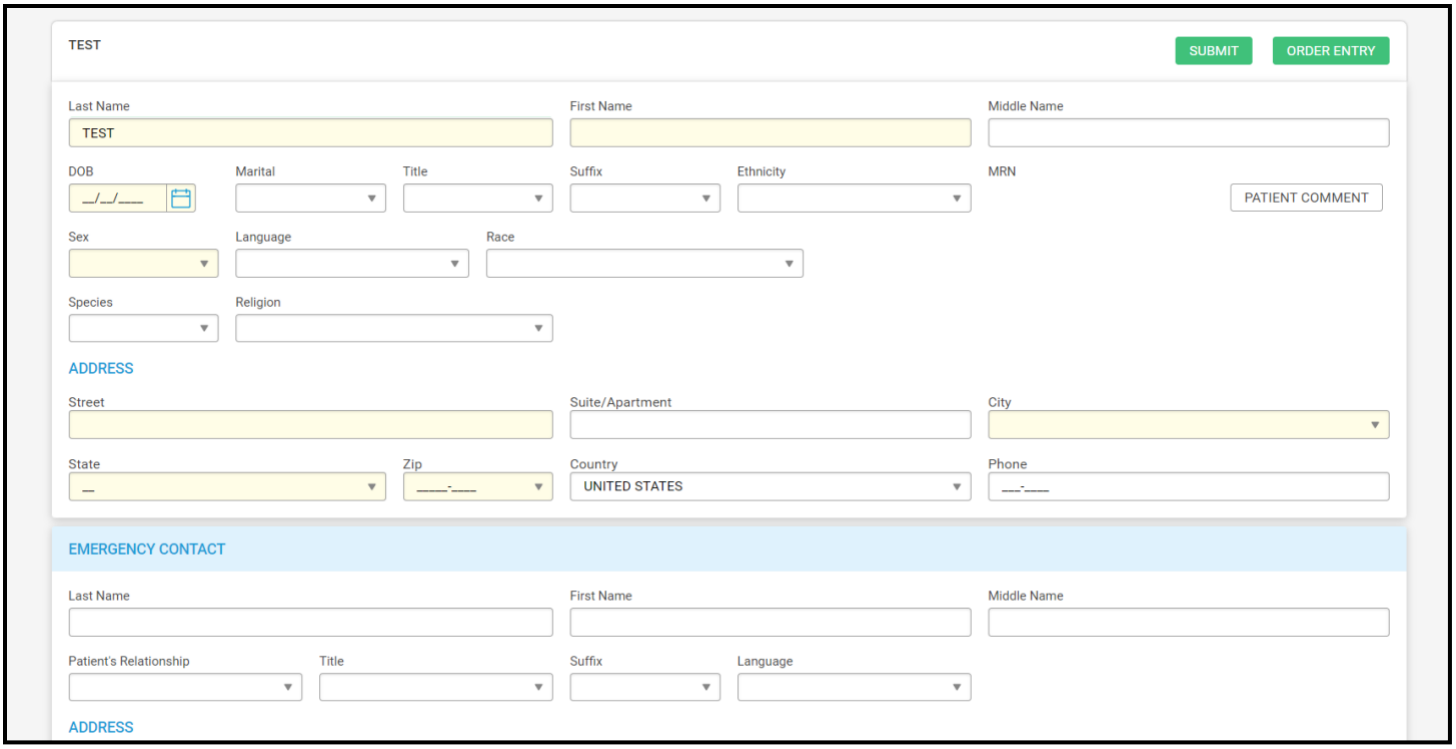
button. If the patient is not in the system user will be notified with **Patient Not Found.**



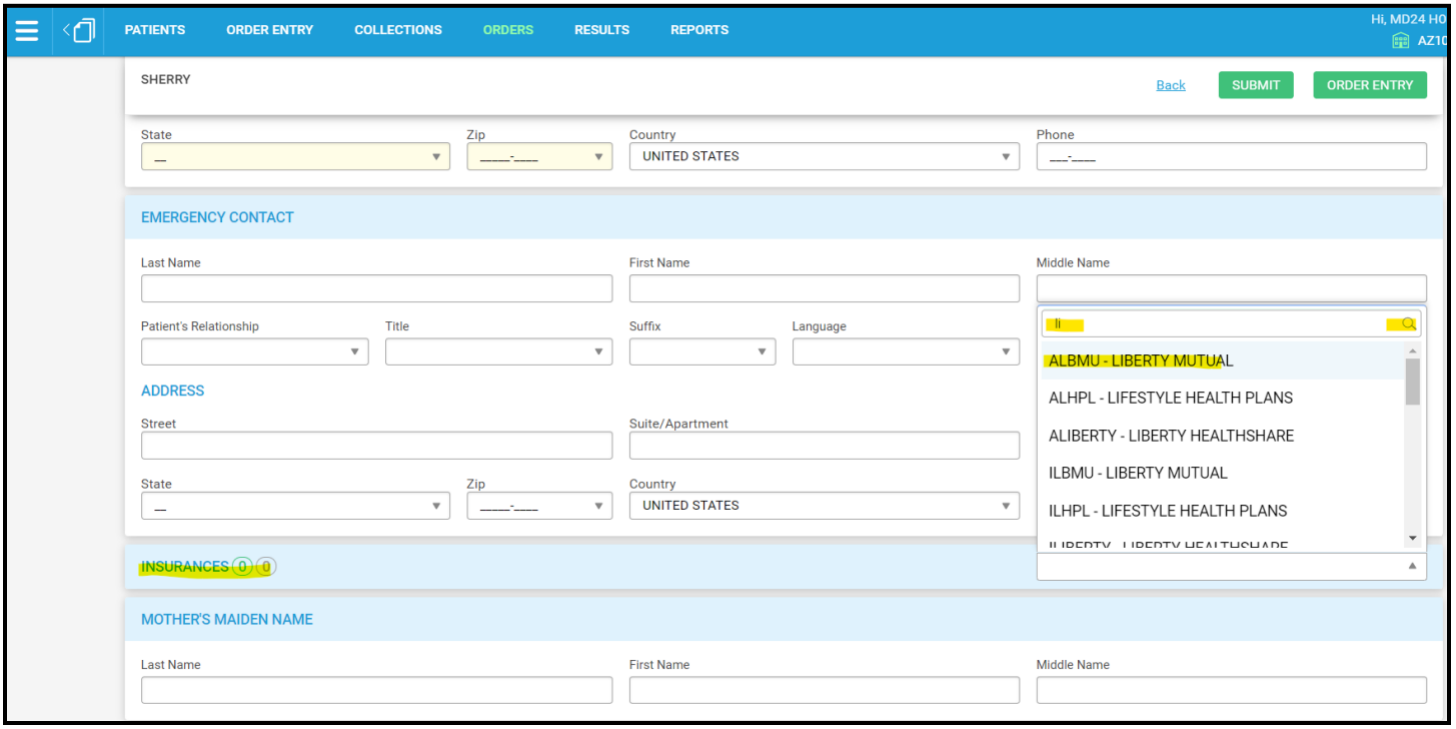
Select +Add New Patient **to create a new patient.**



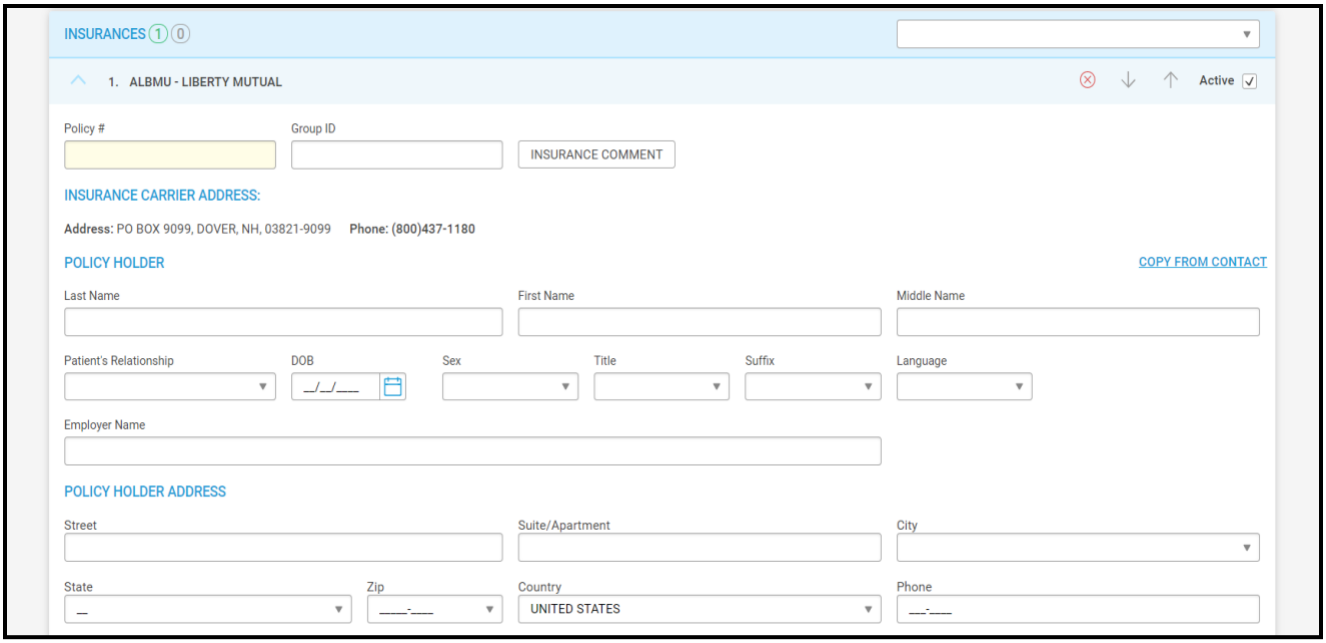
1. Enter the correct patient demographics. These demographics should match the patient's legal name and the DOB (as found on the insurance card(s) or driver's license). Fields that are shaded yellow are required.
2. You can also enter "PATIENT COMMENT" >>CCL will notify this comment to our remote teams.

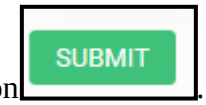


3. Start typing insurance to open insurance and make your selection.



4. Enter the insurance Policy # and Group # (if applicable). Fields which are shaded in yellow are required. Enter the patient's relationship to the insurance policy holder.



5. When all fields have been entered correctly, select the button 

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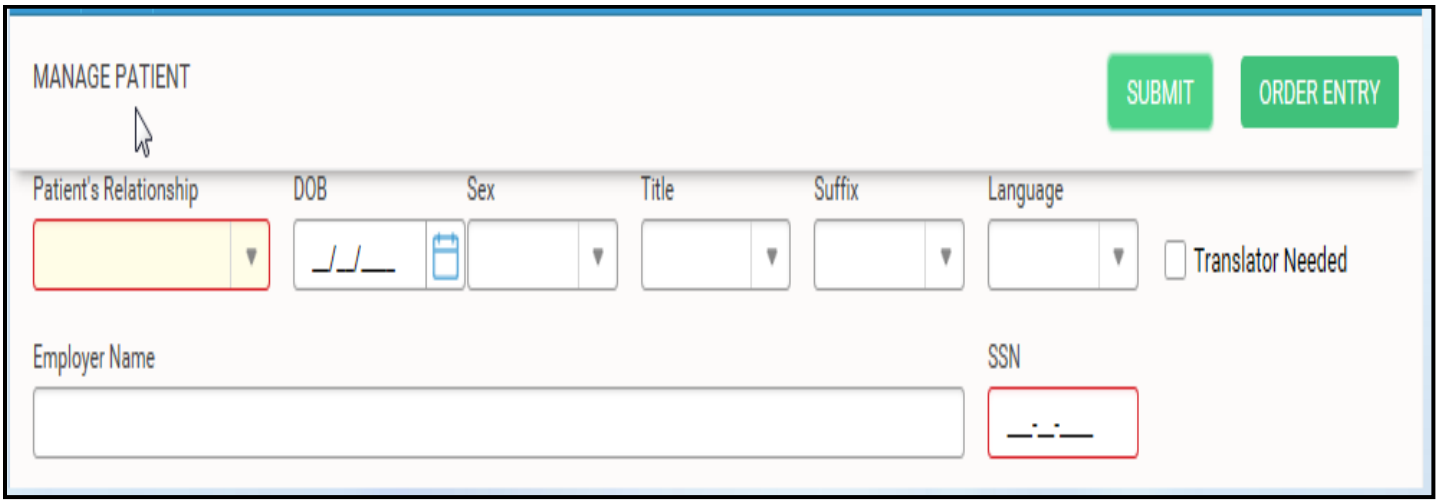
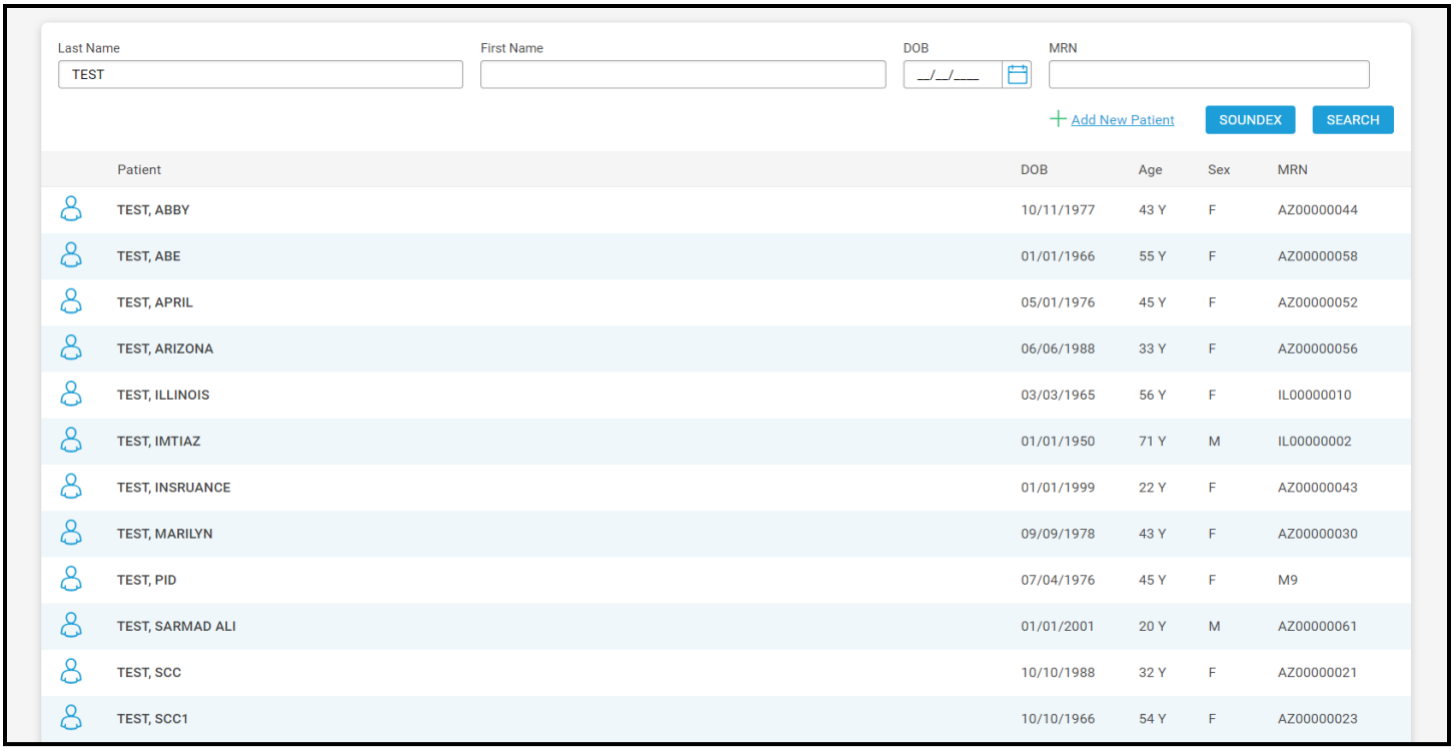
*If any required fields were missed you will see a RED border around the field. The system scrolls down automatically to show the missing fields to complete the registration.

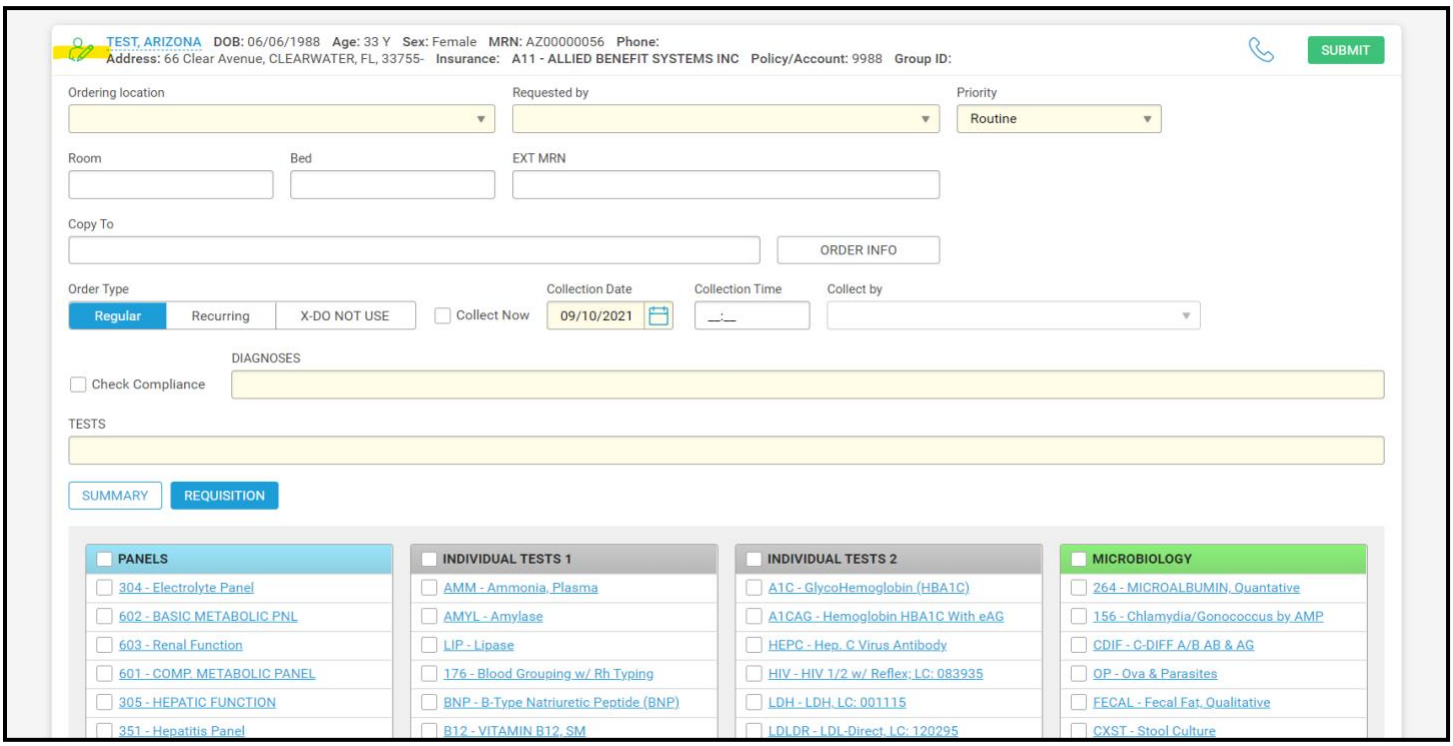


Regular-Order entry.

1. If the patient is previously registered search for patient in the system then highlight patient from drop down list and enter.

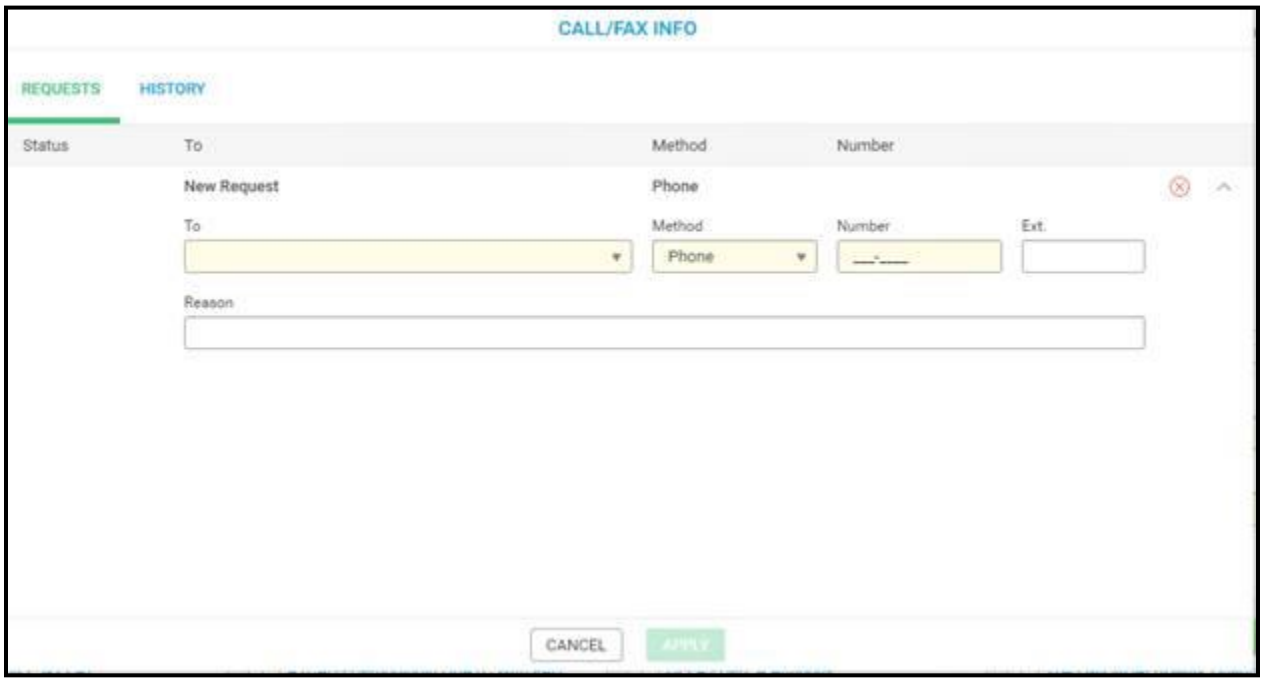


2. The patient Order Entry screen presents itself. User **MUST** verify that all information is correct for the **Patient & Payor/Insurance** field. If any information needs updating, select the to edit (see next page)

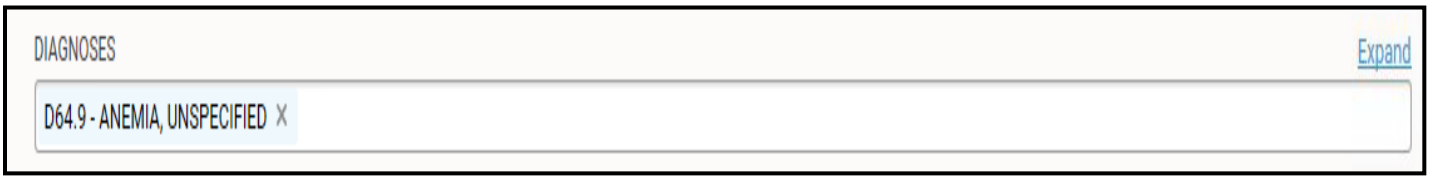


3. Click on the 'PHONE' icon >Select Fax in the Method drop-down, enter a 10-digit Number (no +1),

click Apply (System will send additional fax to this fax#, in addition, to the Ordering Location fax#)

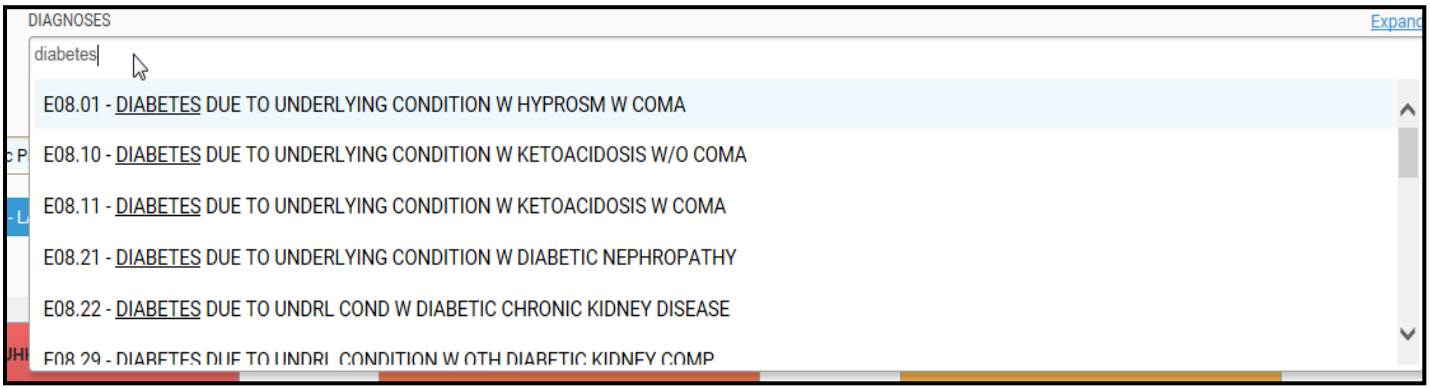


4. Enter Ordering Location, if necessary, (This field will be grayed-out based on User Access)
5. Enter Ordering Physician in the "Requested by" field
    a. If Physician is not listed, please call the appropriate CCL Location, CCL staff will add it.
6. Select Priority
    a. Routine should be selected for ALL future orders
    b. Stat/Urgent CANNOT be ordered for future dates
    c. Timed can be selected for drugs ONLY (i.e. Vancomycin)
7. Enter Room/Bed, if available
8. Enter comments in "ORDER INFO" to provide notes to CCL Labs for this specific order
9. Select Regular for One-time orders (Today or Future), Recurring for Standing Orders
10. Select "Collection Date" by clicking on the calendar icon
11. Enter the ICD-10 diagnosis code in Diagnosis field.



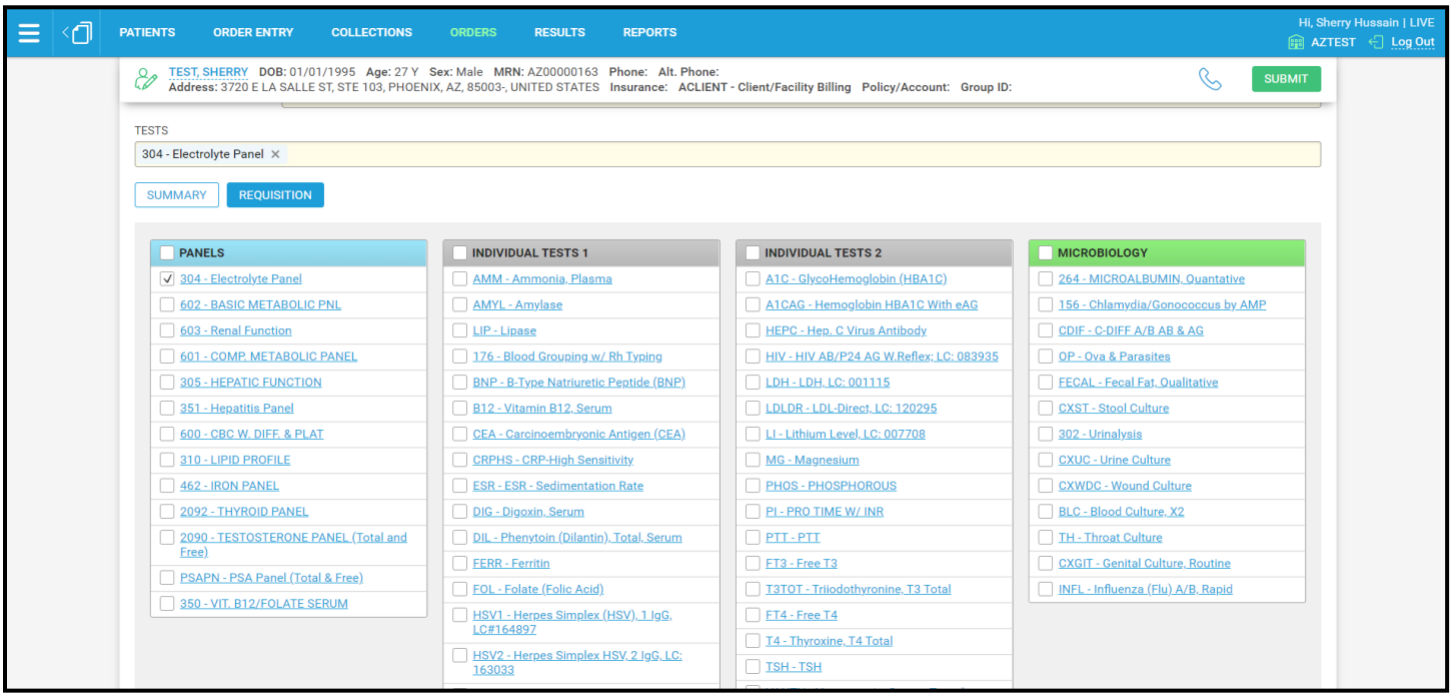
12. User can enter the name of the diagnosis code in the diagnosis field which shows available choices.

    Select the correct diagnosis code (ICD-10) by highlighting the code and enter.



13. CCL has built a Test Template to facilitate in placing Lab Orders - If you choose to utilize the template,

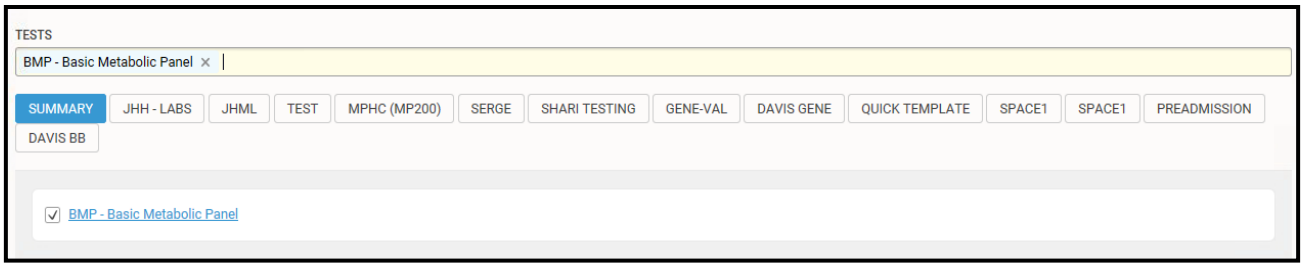
    Click the box next to the test you want to order.



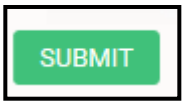
OR

14. In the "TESTS" search field – type the Test Name and select the test ordered by the physician.

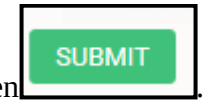
15. Highlight the test and enter:



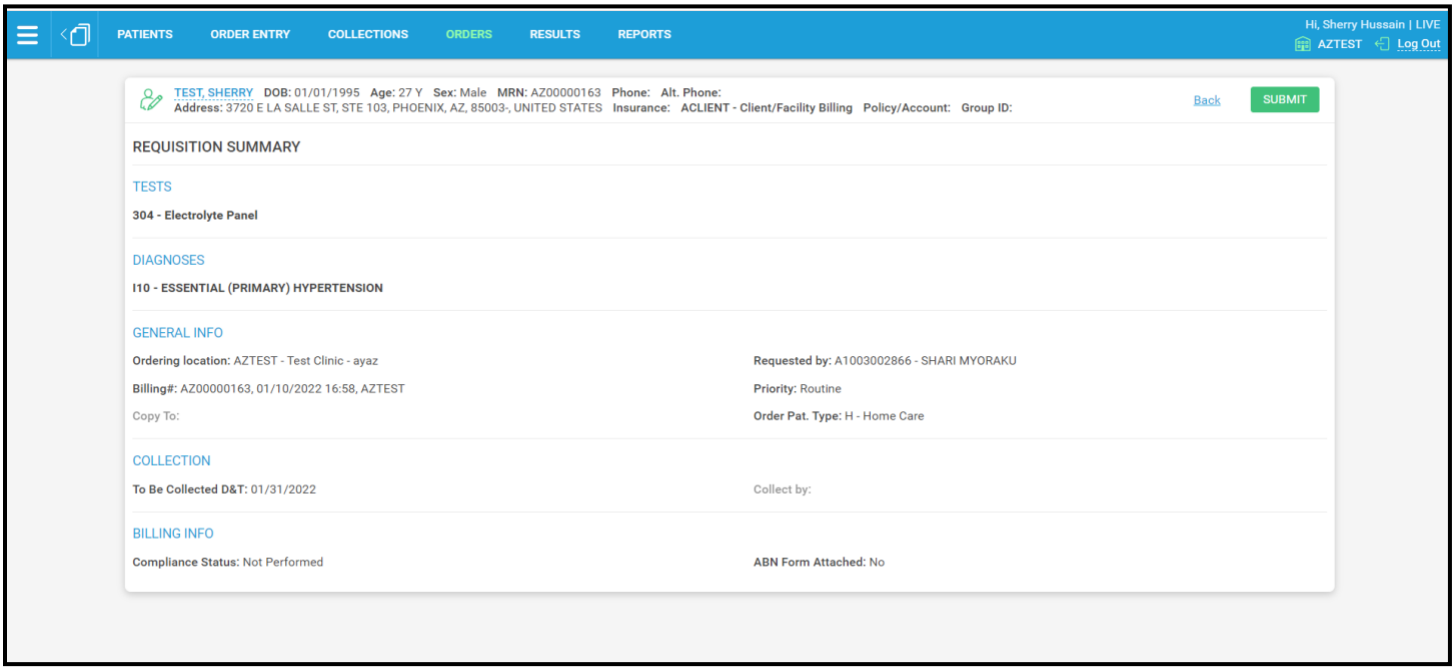
16. NOTE: If patient is Fasting. User MUST ENTER "FP – Fasting Patient" test code in the order

17. Click 

Button >Requisition Summary page shall display

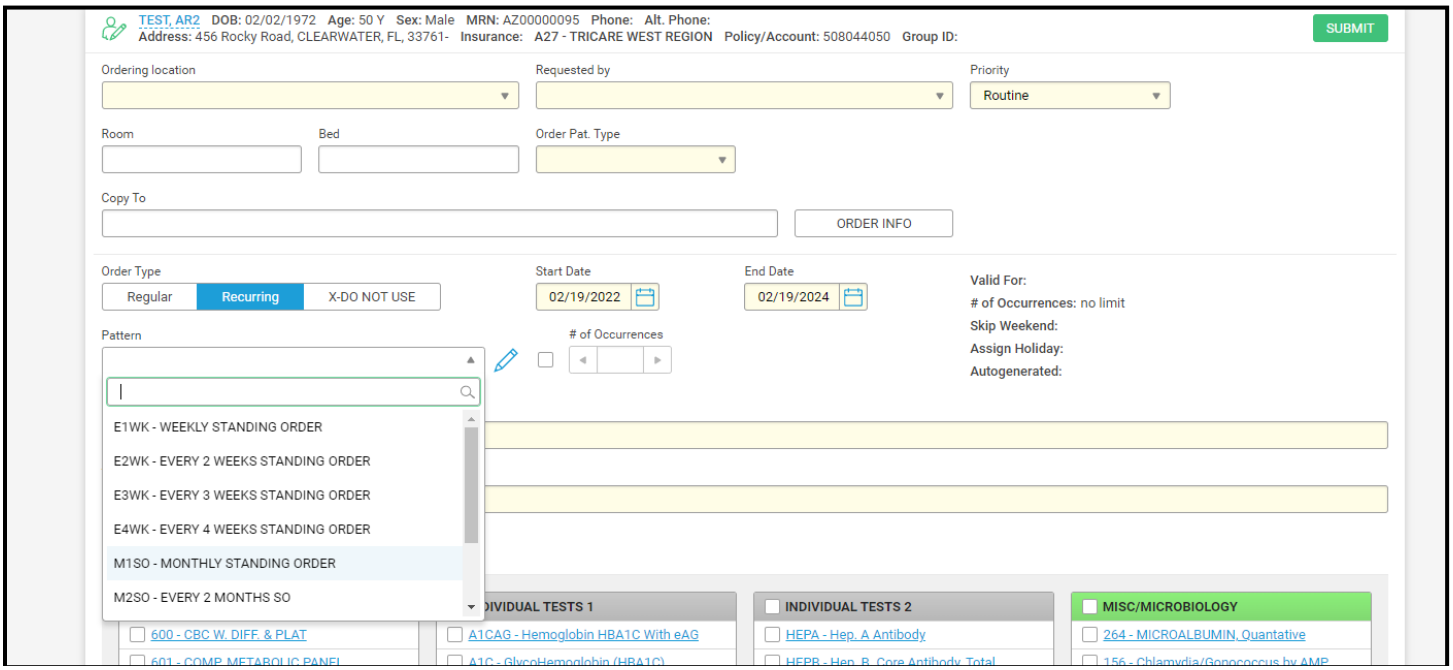
18. Review the order summary then 

. For example,



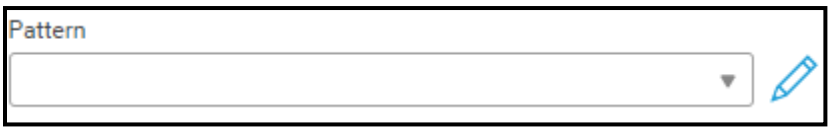
Recurring (Standing Order) test order

1. On the Order Entry Screen, instead of “Regular” Select Order Type as “Recurring”:



2. Standing Orders can be placed with two methods.
    a. Select Start Date and End Date.
        i. End Date must be Selected per the CMS Medical Records requirements
    b. As per #1: Select the Pattern drop-down menu
    c. Select “Pattern”, i.e. Daily, Weekly, Fortnightly, Monthly etc:
    d. *NOTE: Rest of tests order details would be same as regular order explained in above “Regular test order”.*
    e. Submit and then Submit after review of the Requisition Summary page

3. Method#2 for placing Standing Order:
    a. Click on the Pencil next to the Pattern Field



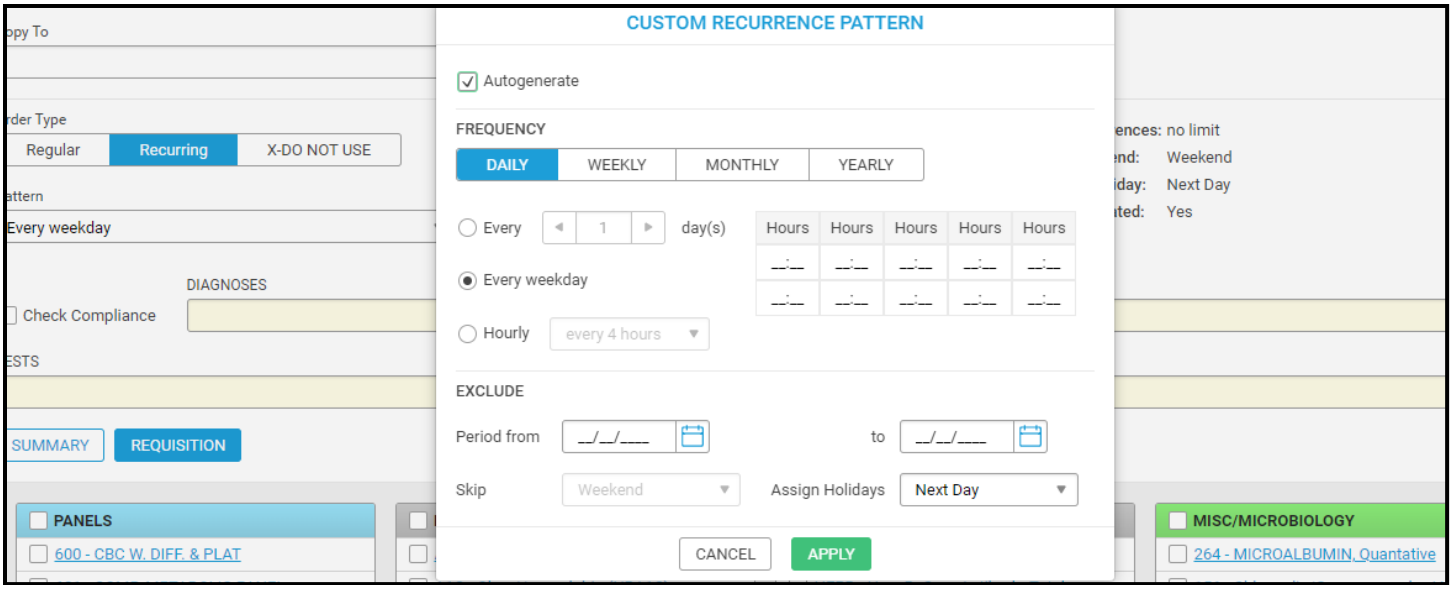
    b. Custom Recurring Pattern screen shall pop-up (see next page)

c. **FREQUENCY**: DAILY, WEEKLY,MONTHLY,YEARLY

d. Follow the steps

e. **EXCLUDE:** You can ignore this area if Patient does not have any special circumstances

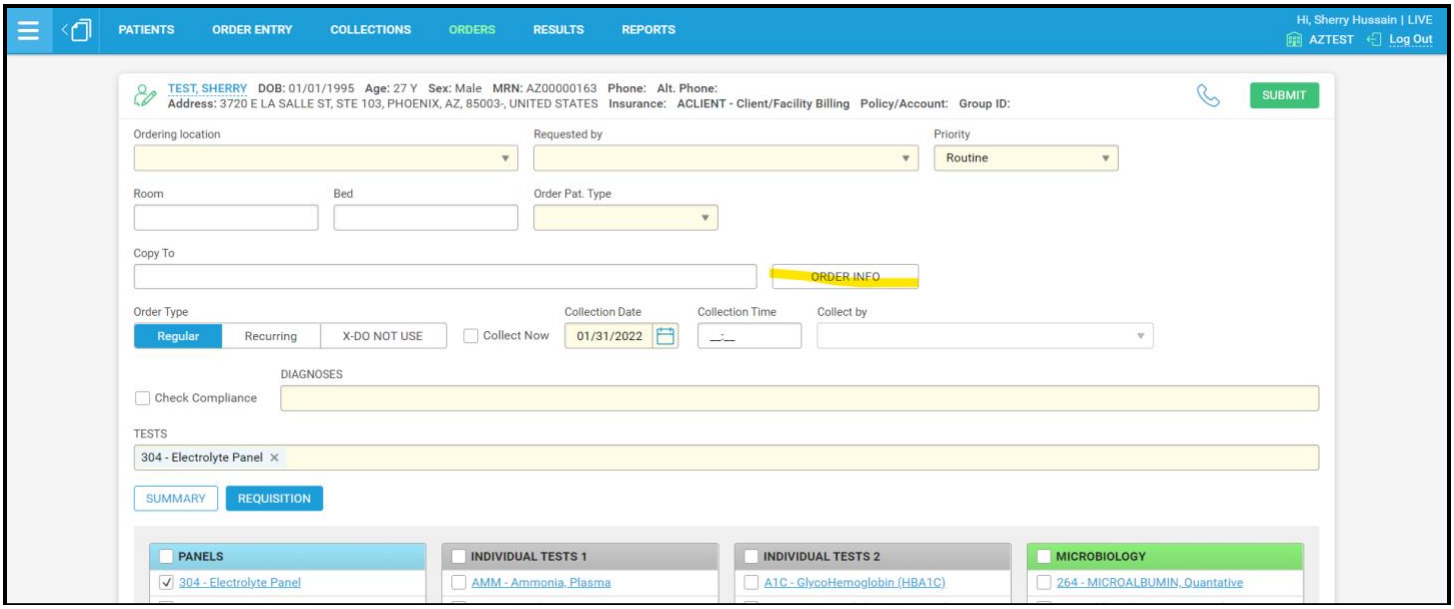
   i. i.e. Patient is out of town for a month (From and to period could be selected to exclude those dates, if needed)



NOTE: Rest of tests order details would be same as regular order explained in above "Regular test order".

Order Info:

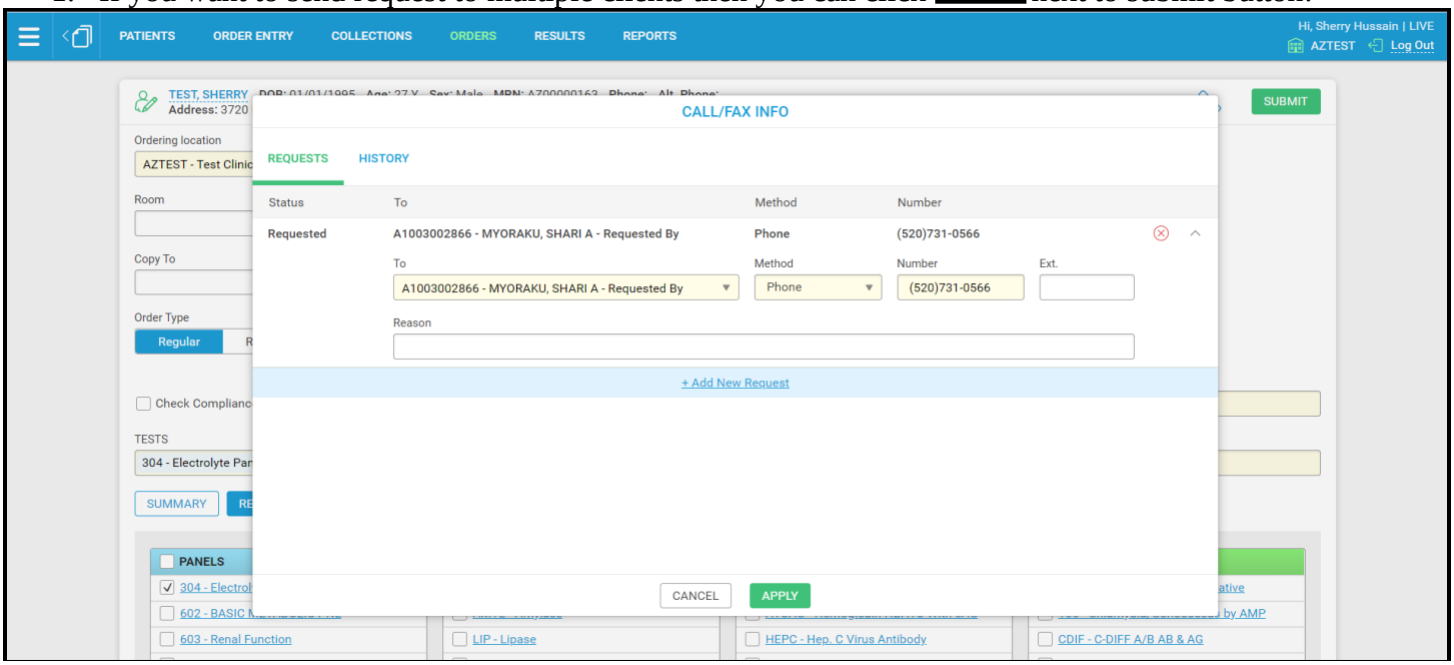
1. Order info button is available in test order page to add notes and comments: For example,



2. Once you click, user can free-type Order notes for CCL team

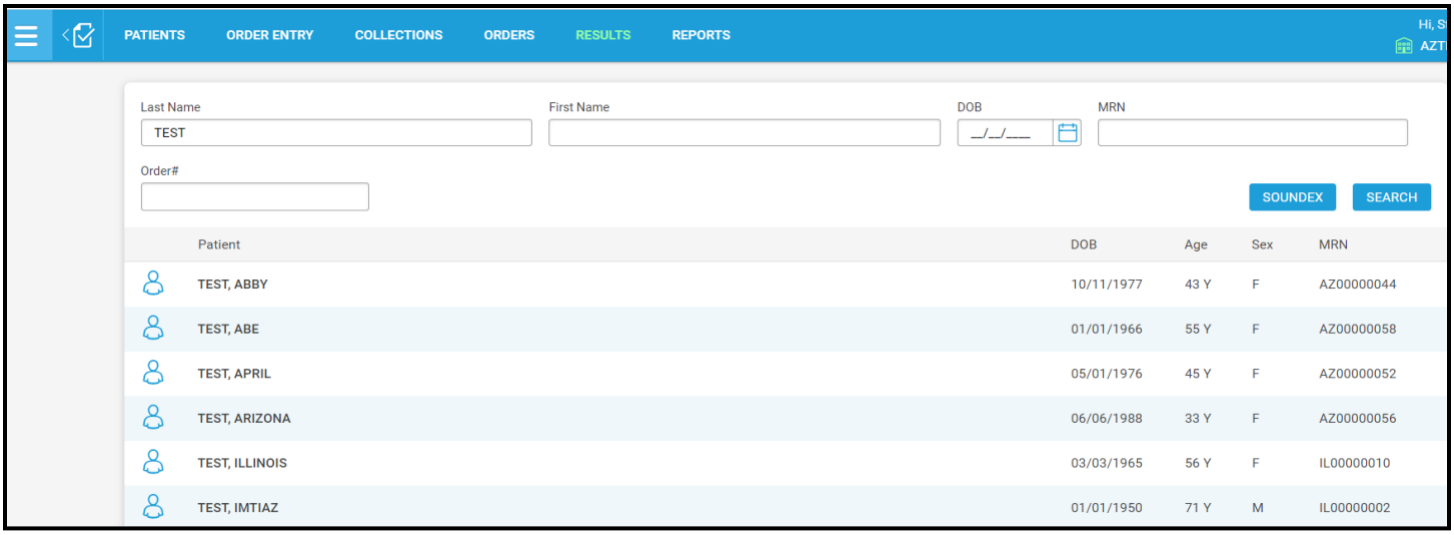
Call/Fax Info

1. If you want to send request to multiple clients then you can click next to submit button:



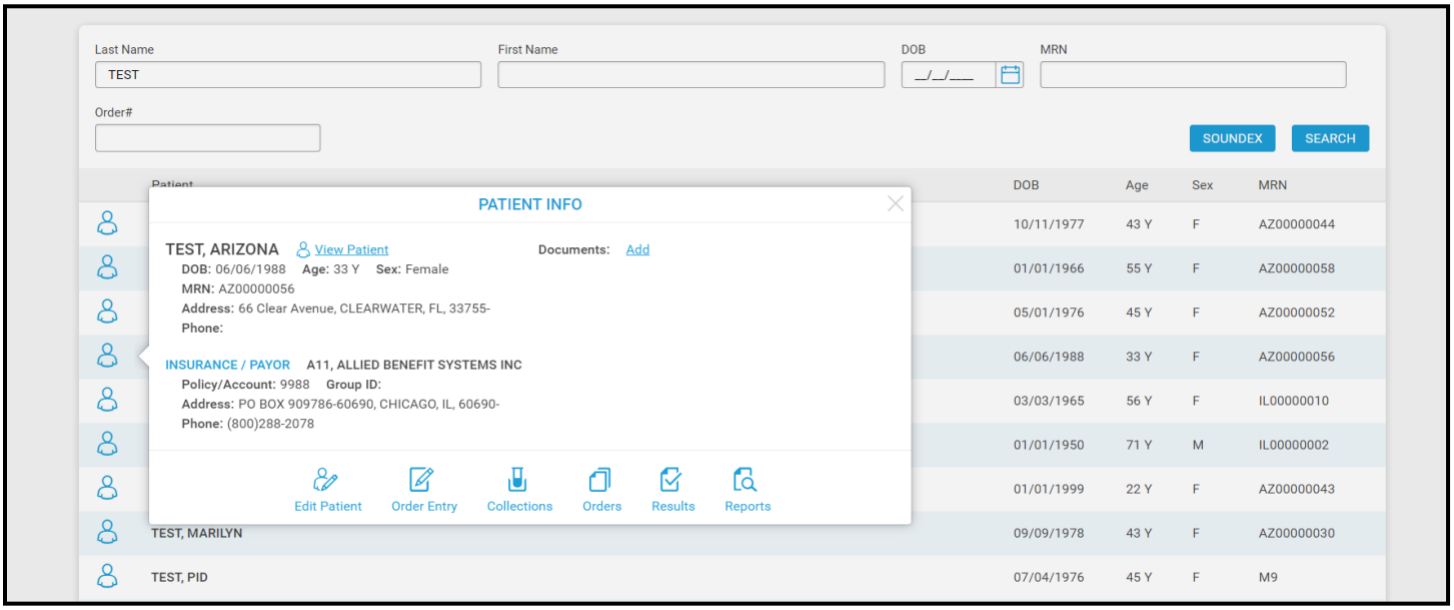
Viewing/Printing Patient Results

1. Select the Results menu icon.

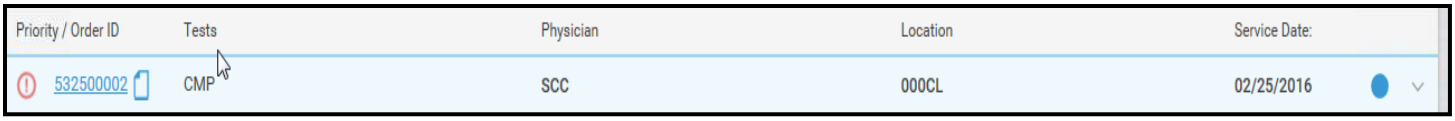


2. The Patient list is by sorting order with STAT/Urgent, Timed order will be at the top then normal patients by names in ascending. Highlight your patient.

3. To view a patient information click on person icon beside the order.



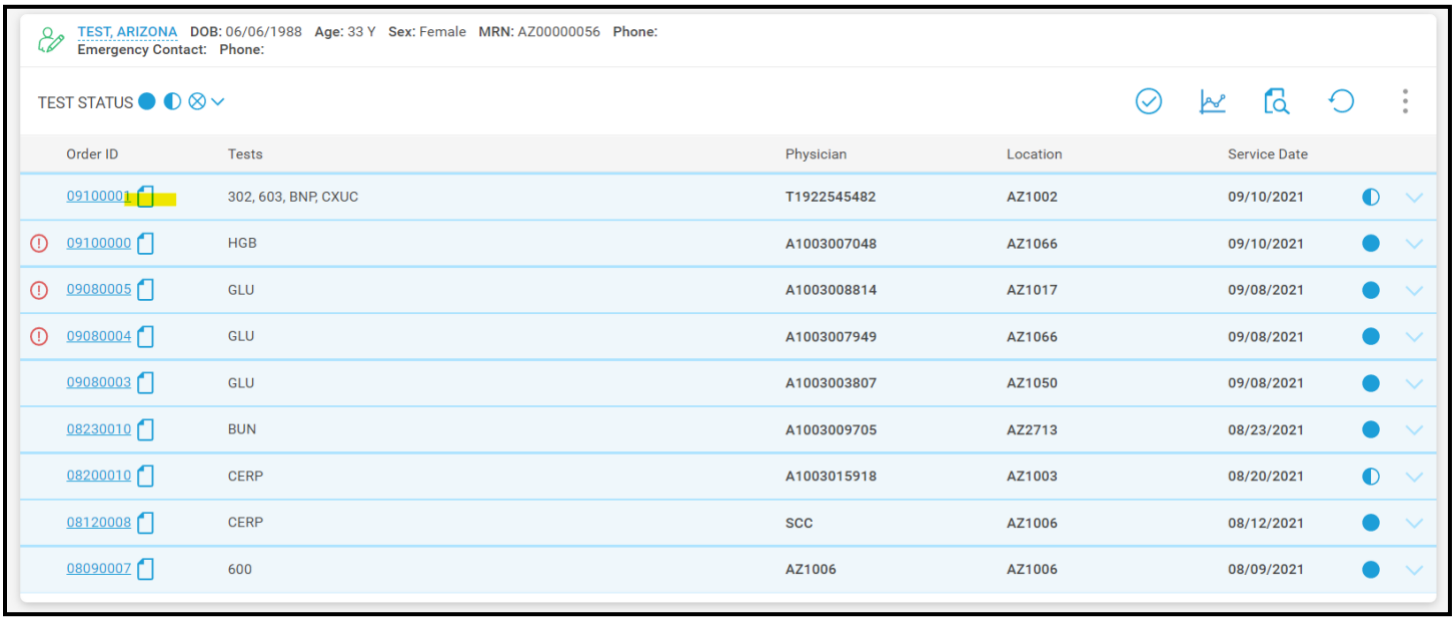
4. To see the components of a group test, view comments, micro sources for example click on down arrow ( ) to open.



5. To view PDF Report, click on ( ) beside the order to open.

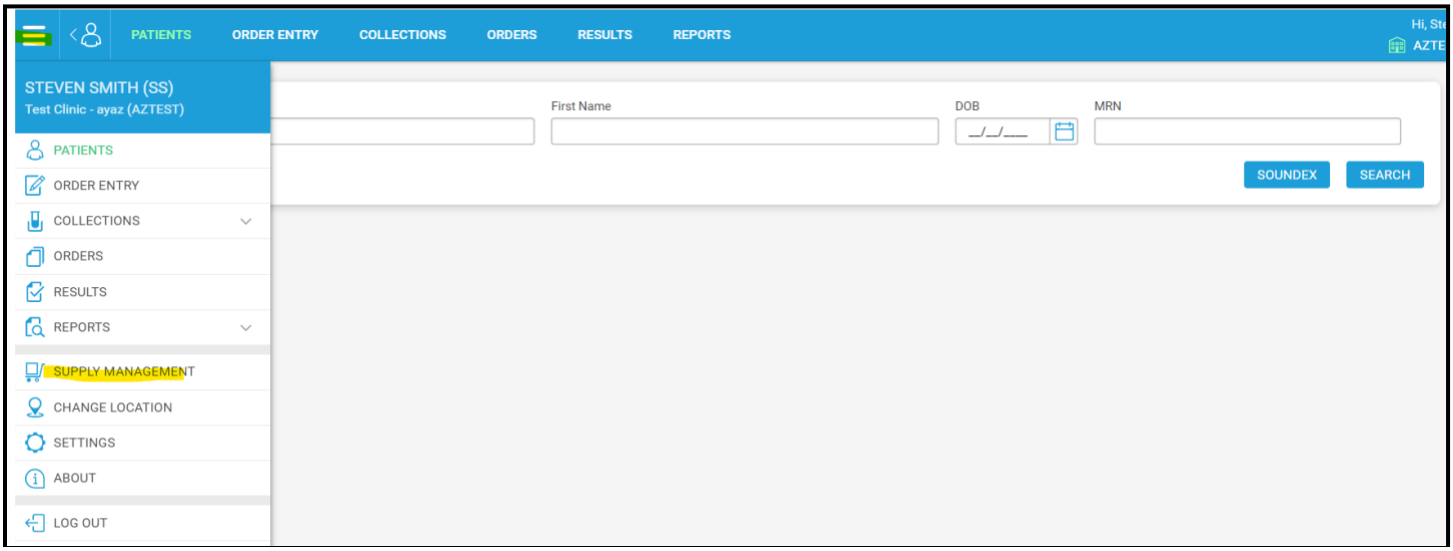
6. PDF report shall open >Click on the Printer Icon (Do not use the “PRINT” button >System will default to the local printer

7. User can print report or close report. Click on Close button to go back to Results.



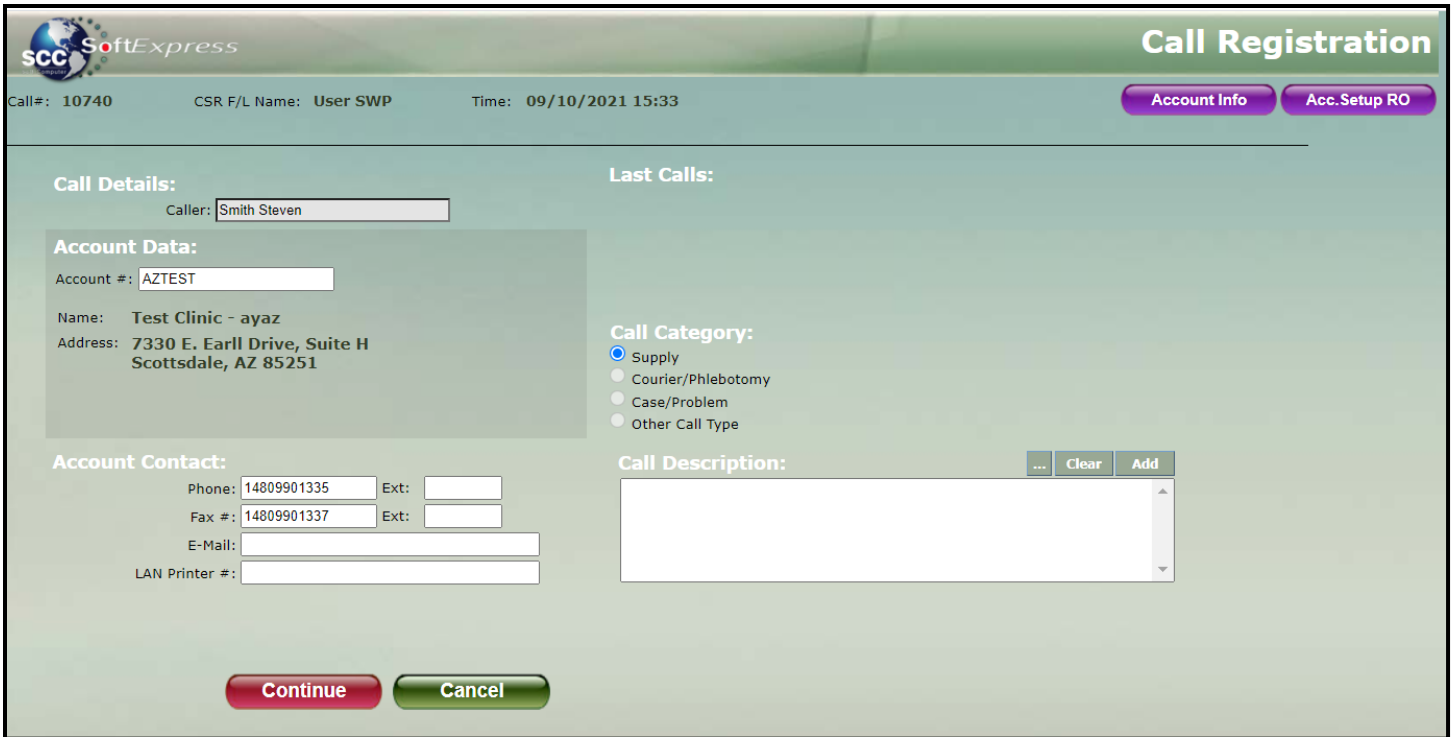
How to Order Supplies:

1. Click on side bar button and then SUPPLY MANAGEMENT as highlighted in picture below. System will bridge into CCL Inventory Management system automatically.



2. At next page (as shown below) verify user details and press

button.

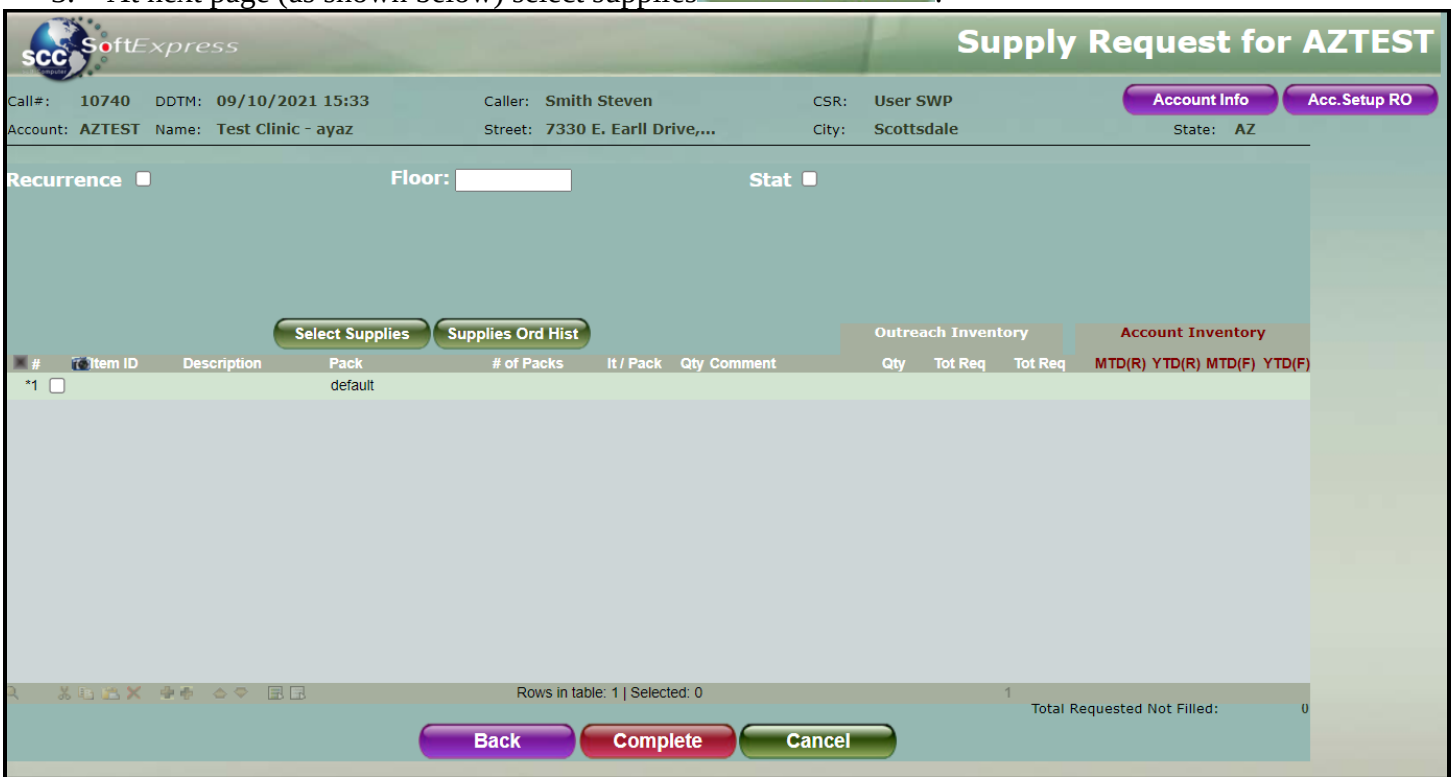


NOTE:

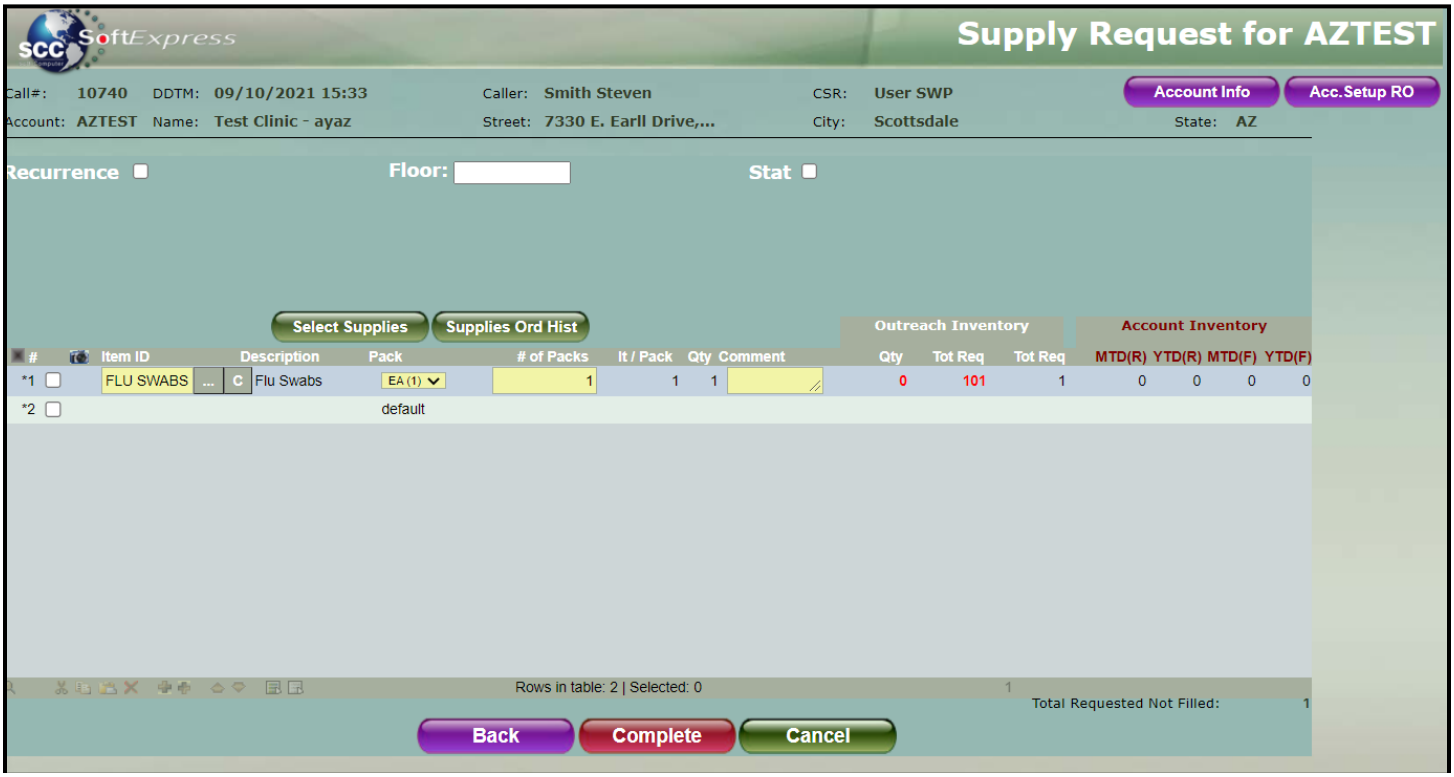
Once CCL receives the Supply Order form, order shall be reviewed against internal utilization report and supplies shall be dispatched based on your volume.

3. At next page (as shown below) select supplies

.



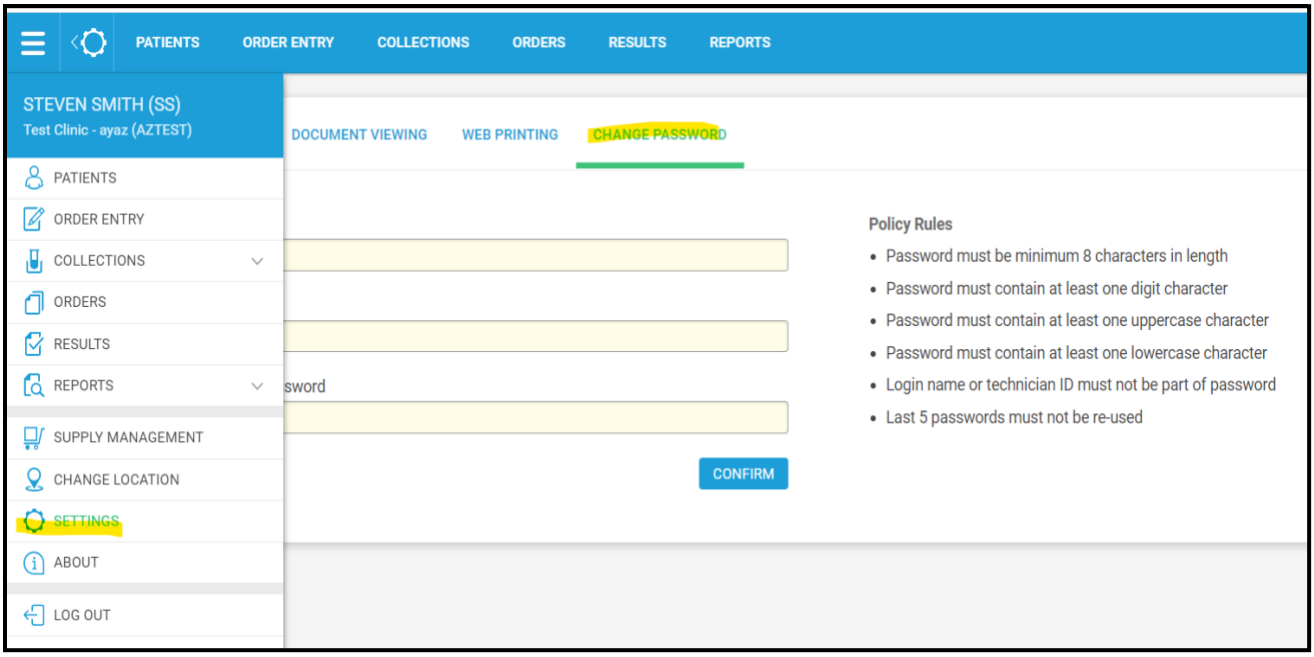
4. You can edit/delete supply details by double clicking on each item or from menu at the bottom of the list.



5. Once all supplies are complete then press button. It will process the request and load main page where you can proceed with other tasks you want.

Changing Your Password

1. **Settings** tab from the main menu.



2. Click on CHANGE PASSWORD to open.

   a. With your cursor in the "**Old Password**" box, type your current password.

   b. Move your cursor to the "**New Password**" box and enter a new password.

   c. Move your cursor to the "**Confirm New Password**" box and re-type the

   d. New password

   e. Click on the

button and then apply.

   f. If fails review Policy Rules.