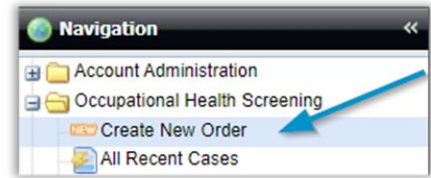


Creating a New Order

After logging into the system, click on the expander (+) next to Occupational Health Screening under Navigation in the upper left-hand corner.

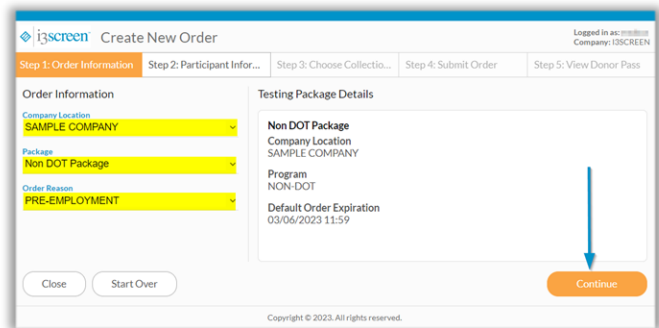
Click Create New Order to start an order. This will open a new browser tab.



Step 1: Order Information

When creating a new order, each current step is highlighted, and the top navigation bar shows the remaining steps to be completed.

Select the Company Location, Package, and Order Reason from the drop downs. The Testing Package Details section will populate as selections are made along with the package expiration date. If a DOT package is selected, the option to select Agency will appear and will need to be selected as well.



 Quick Tip! Use the Tab button to get started.

Step 2: Participant Information


Enter the participant information; required fields are indicated with blue font. The SSN/EID needs to be unique, a minimum of 5 characters and can be alpha-numeric. DOT-FMCSA orders require the CDL number in the required state format. The required phone number must be the participant's, and not the ordering user's information.

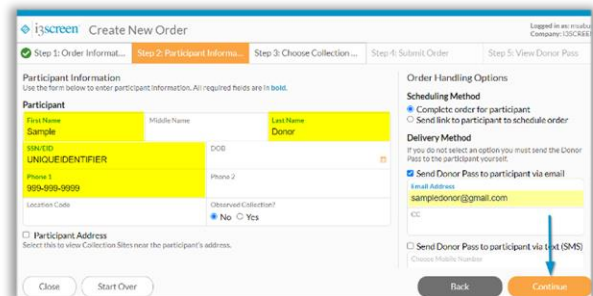
Select the preferred Scheduling Method. Options include:

1) Complete Order for the Participant

Select the Delivery Method to send the donor pass to the participant via email (or text, if enabled). Enter an additional email address into the CC field to receive a copy of the donor pass.

The default search is the Customer Location address. Optional - Enter the participant address.

 Quick Tip! Instead of adding the full participant address, adjust the starting address zip code during the collection site search.



2) Send Link to Participant to Schedule Order

Select the Delivery Method for the scheduling link (email or text, if enabled). Enter an additional email address into the CC field to receive a copy of the scheduling link.

Click Continue. Go to Step 4.

