

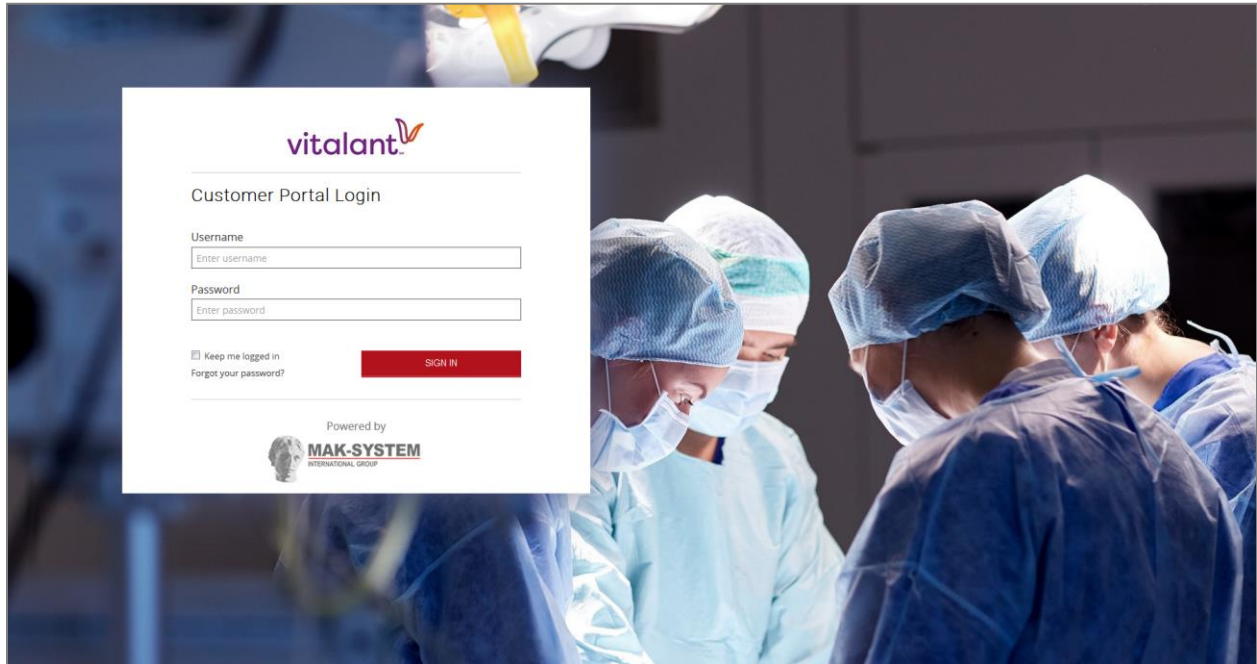


# Customer Portal User Guide

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## ACCESSING THE CUSTOMER PORTAL

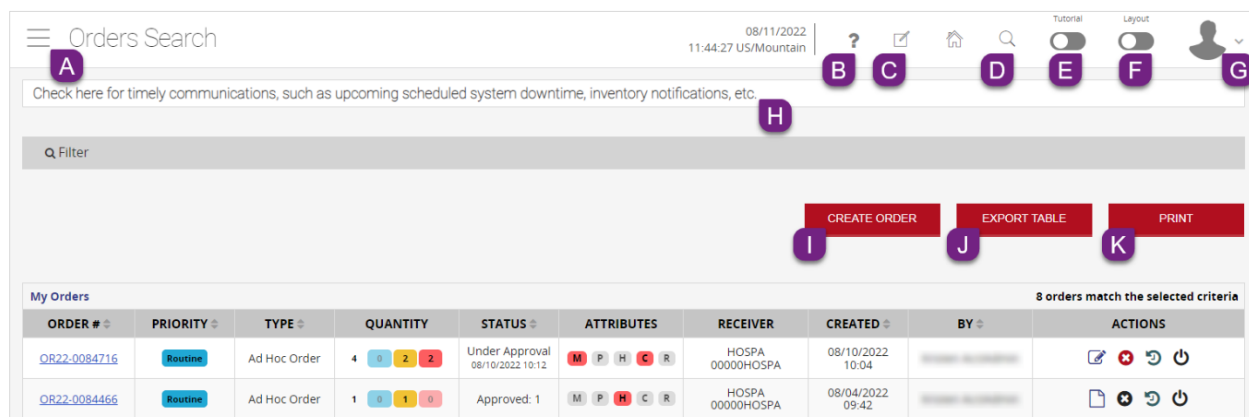


- A. Access customer portal using one of the following internet browsers:
  - a. Google Chrome
  - b. Mozilla Firefox
  - c. Microsoft Edge
- B. Access the portal via the following URL: <https://customerportal.bloodsystems.org/HWBO/portal/login>
- C. Username field is case sensitive (this must be unique to the user; generic accounts are not allowed)
- D. Password
  - a. Requirements
    - i. At least 8 characters in length
    - ii. Contain numbers, letters (both upper and lower case), and special characters
    - iii. Passwords are required to be changed every 90 days.
  - b. Resets
    - i. “Forgot Your Password?” Link is your best option. This will generate an email (to the address on file) containing a link to reset the user’s password.
    - ii. A Customer Portal Hospital Account Admin can also reset passwords, if needed.
    - iii. Contact your blood center for assistance, if needed.
  - c. Locked Out –
    - i. After three failed attempts you will be locked out for 4 hours, contact your local Hospital Account Admin for resets.



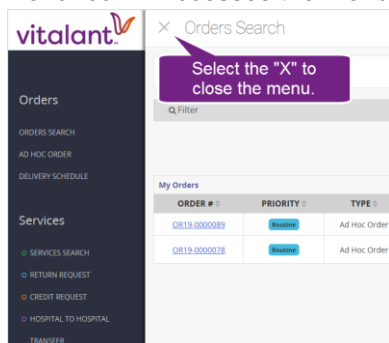
**DO NOT GET LOCKED OUT. USE THE “FORGOT YOUR PASSWORD?” LINK TO RESET YOUR PASSWORD.**

# PROGRAM OVERVIEW



## Header Descriptions:

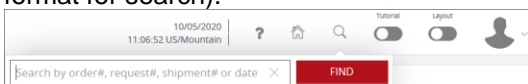
### A. Menu Icon – Accesses the menu.



### B. Training Materials – Links to Vitalant Customer Portal Training Resources website, where you can find additional training materials, such as this guide.

### C. Customer Feedback – Links to form to report compliments, concerns, or issues with your service.

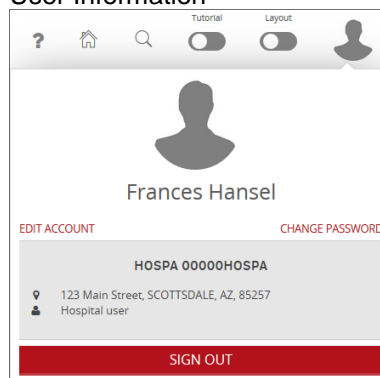
### D. Search Icon - Accesses smart search field, can search by order number, request number, shipment number, or date (use mm/dd/yyyy format for search).



### E. Tutorial Toggle Button - Turns on and off pop-ups that will walk you through your order.

### F. Layout Toggle Button – Changes color scheme.

### G. User Information



### H. Banner – Provides timely notifications from Vitalant, as needed.

### I. "Create Order" - To start a new order or request.

### J. Selecting "Export Table" will create an Excel spreadsheet, based on the current results shown. If you have not filtered the screen, it will create a report of all open orders or requests.

### K. Selecting "Print" will print the current view of results on the page.



# ORDERS

## ORDER SEARCH

A. Hover the mouse over icons to display descriptions.

Orders Search

07/26/2021

13:34:02 US/Arizona

?

Tutorial

Layout

Q Filter

CREATE ORDER

EXPORT TABLE

PRINT

My Orders

10 orders match the selected criteria

ORDER #	PRIORITY	TYPE	QUANTITY	STATUS	ATTRIBUTES	RECEIVER	CREATED	BY	ACTIONS
<a href="#">QR21-0110091</a>	<div>Routine</div>	Standing Order	1 <div><div>0</div><div>1</div><div>0</div></div>	Under Approval 07/21/2021 17:00	M P H C R	HOSPA 00000HOSPA	07/21/2021 17:00	<div></div>	<div></div> <div></div> <div></div> <div></div>
<a href="#">QR21-0110089</a>	<div>STAT</div>	Ad Hoc Order	1 <div><div>0</div><div>0</div><div>1</div></div>	Under Approval 07/21/2021 13:26	M P H C R	HOSPA 00000HOSPA	07/21/2021 13:21	<div></div>	<div></div> <div></div> <div></div> <div></div>

QUANTITY				
6	0	0	6	

# left of boxes is the total ordered

2	Plasma
8	Platelets
4	Red Blood Cells

ATTRIBUTES				
M	P	H	C	R

M	Modifiers
P	Phenotypes
H	HLA
C	Comments
R	Recipient

ACTIONS			
✎	✕	↺	⏻

✎	Edit
📄	Edit (Inactivated)
✕	Cancel
✕	Cancel (Inactivated)
↺	Order History
⏻	Standing Order

## ORDER SEARCH (CONT'D)

- B. Status can be seen in the status column of the Order Search window or by selecting a specific order (as seen below). The status for each step updates from grey (not started) to yellow (in progress) and then to green (completed). Also, selecting “Order History” from this screen, can provide a detail history of the order, if needed.

The screenshot shows the 'Order' search results page. At the top, it displays the order number 'CR19-0000273 / 0000000868726' and the submission date '02/07/2019 09:42:37, US/Mountain'. Below this is a progress bar with status tabs: SUBMITTED, UNDER APPROVAL, APPROVED (9/8), UNDER PREPARATION, ORDER FILLED, and DELIVERED. The 'APPROVED' tab is active. The page is divided into two main sections: 'Order to' (Your Blood Center) and 'Order from' (Hospital: Hospital A 000009999). The 'Assigned To' field shows 'Blood Center Filling the Order'. Below this is a table of products with columns: #, Qty, ABO-Rh, Family, Product, Modifiers, Phenotypes, HLA, Under Approval Qty, Agreed Qty, Denied Qty, and Shipped Qty. The table lists three items: 1. O Pos, RBC Red Cells, 3 units; 2. A Pos, RBC Red Cells, 3 units; 3. O Neg, RBC Red Cells, 2 units. A 'COMMENTS' section is on the right. At the bottom are buttons for BACK, ORDER HISTORY, and PRINT. The footer includes the Vitalant logo, copyright information, and the MAK-SYSTEM logo.

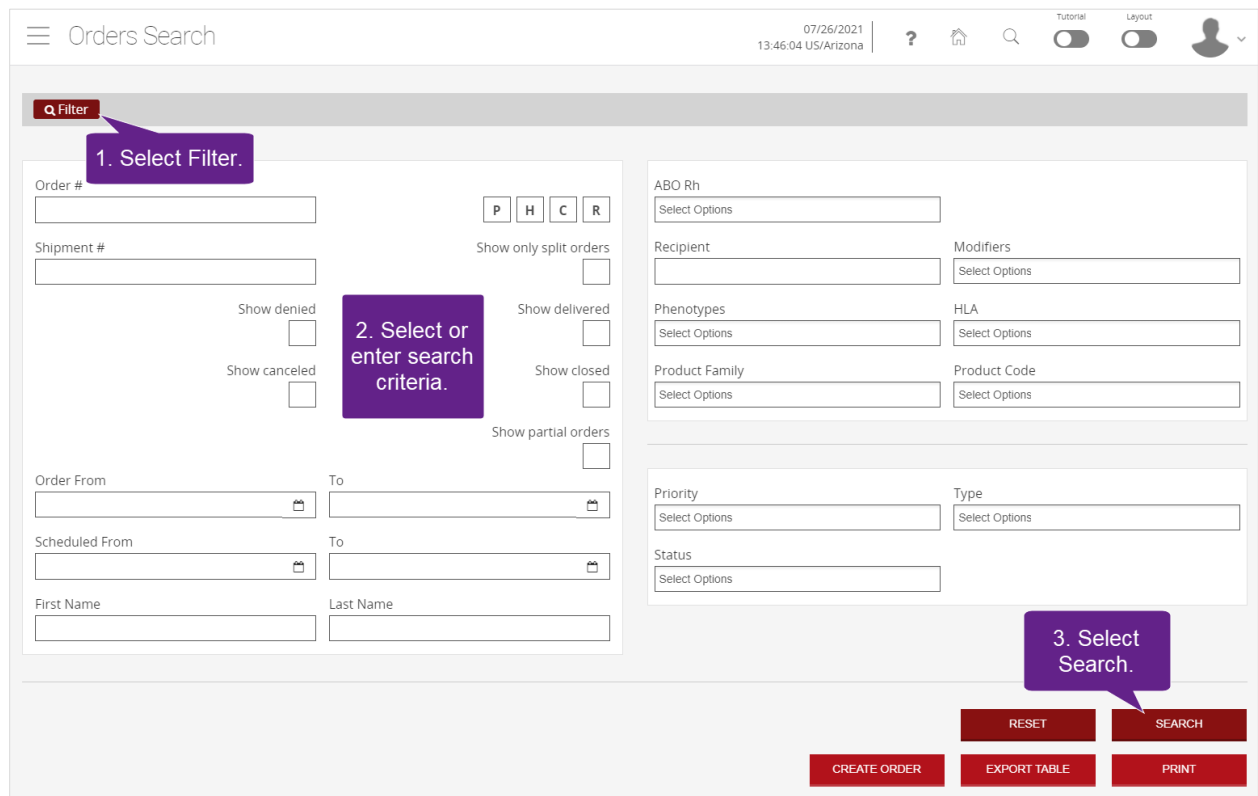
### Status Descriptions:

SUBMITTED	Hospital User submits the order. Contact the blood center if the order does not move to Under Approval.
UNDER APPROVAL	Order was successfully transmitted to the processing center.
APPROVED # / #	Processing center has acknowledged and approved the order.
UNDER PREPARATION	Staff at the processing center are actively packing the shipment.
ORDER FILLED	The shipment is packed.
PICKED UP	Shipment has left the processing center. (Status being tested in limited market)
ARRIVED	Shipment has arrived at the customer's location. (Status being tested in limited market)
DELIVERED	Hospital User has completed Product Reception.
CANCELED	Order was canceled by Hospital User.
DENIED	Order denied or partially denied by processing center.

**ONCE THE ORDER HAS BEEN APPROVED, YOU WILL NEED TO CONTACT THE BLOOD CENTER DIRECTLY IF CHANGES TO THE ORDER OR CANCELLATIONS ARE NEEDED.**

## ORDER SEARCH (CONT'D)


C. Select Filter (  ) to conduct a search based on specific criteria.



The screenshot shows the 'Orders Search' page. At the top, there's a header with a menu icon, the title 'Orders Search', a date/time stamp '07/26/2021 13:46:04 US/Arizona', and icons for help, home, search, tutorial, layout, and a user profile. Below the header is a 'Filter' button with a magnifying glass icon. A callout bubble labeled '1. Select Filter.' points to this button. The main search area is divided into two columns. The left column contains fields for 'Order #', 'Shipment #', 'Show denied', 'Show canceled', 'Order From', 'Scheduled From', 'First Name', and 'Last Name'. The right column contains fields for 'ABO Rh', 'Recipient', 'Phenotypes', 'Product Family', 'Priority', 'Type', 'Status', 'Modifiers', 'HLA', and 'Product Code'. There are also checkboxes for 'Show only split orders', 'Show delivered', 'Show closed', and 'Show partial orders'. A callout bubble labeled '2. Select or enter search criteria.' points to the 'Show denied' checkbox. At the bottom right, there are three buttons: 'RESET', 'SEARCH', and 'PRINT'. A callout bubble labeled '3. Select Search.' points to the 'SEARCH' button. At the bottom left, there are three buttons: 'CREATE ORDER', 'EXPORT TABLE', and 'PRINT'.

D. Selecting “Print” will print the current view of results on the page.

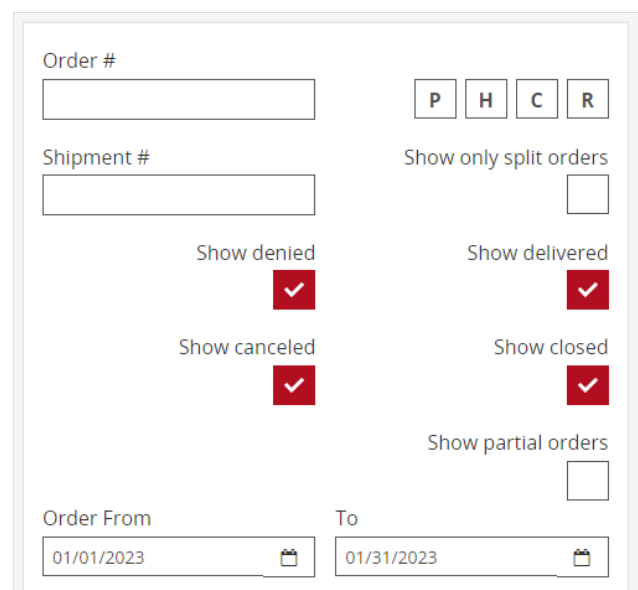
E. From the Order Search window, you can select “Create Order” to access the Ad Hoc Order function. See [Ad Hoc Orders section](#) of this user guide for further instructions on placing orders.



**USING A DATE RANGE FOR YOUR FILTER, AND NOT SEEING EVERYTHING?**

**SELECT THESE BOXES:**

- SHOW DENIED
- SHOW DELIVERED
- SHOW CANCELLED
- SHOW CLOSED



This screenshot shows the 'Orders Search' page with the date range filter selected. The 'Order From' field is set to '01/01/2023' and the 'To' field is set to '01/31/2023'. The 'Show denied', 'Show delivered', 'Show canceled', and 'Show closed' checkboxes are all checked with red checkmarks. The 'Show only split orders' and 'Show partial orders' checkboxes are unchecked. The 'ABO Rh', 'Recipient', 'Phenotypes', 'Product Family', 'Priority', 'Type', 'Status', 'Modifiers', 'HLA', and 'Product Code' fields are empty. The 'RESET', 'SEARCH', and 'PRINT' buttons are at the bottom right. The 'CREATE ORDER', 'EXPORT TABLE', and 'PRINT' buttons are at the bottom left.

## AD HOC ORDER

1. Select “Ad Hoc Order” from Menu.
2. Select the type of order you need to place.
  - a. STAT: Not more than 1 hour from the time an order is received by the blood center to the time it is shipped.
  - b. ASAP: Not more than 4 hours from the time an order is received by the blood center to the time it is shipped.
  - c. Routine: Are stock orders that are shipped as workload and product availability permit, but not later than 24 hours from the time the order is received by the blood center.
  - d. Scheduled: Request for components to be delivered by a specific date and time (24 hours to 30 days from order date).

**NOTE:** Time frames may vary by location, so contact your blood center for clarifications. They may also vary due to other factors (e.g., blood shortages, 3-day weekends, high usage).

Qty	ABO-Rh	Family	Product	Modifiers	Phenotypes	HLA
2	Not specified	PLT	Platelets			

3. Select a Family or Products to order
  - a. Use the “Products” tab for products not listed in the “Family” tab, such as pooled cryo.
4. Enter the number of products needed for each blood type
  - a. Blood types available will depend on family selected.
  - b. NS = Not Specified
  - c. Blood type equivalents may be substituted by the blood center filling the order.
5. Select any Phenotypes/Modifiers/HLA options as needed.
  - a. These options are available based on family/product being ordered.
6. Optional: Select “Add Product” to add additional product type to order.
7. Optional: Edit or delete entries.
8. Select “Proceed” when all products are requested.



## AD HOC ORDER (CONT'D)

- Optional: Enter comments. To protect patient privacy, do NOT include patient information in the comments field, including diagnosis, lab results, etc. This field should only be used to communicate specific needs, such as number of bags to attach, when selecting the “Attach Extra Bags” modifier.

The screenshot shows the 'Order' form with the following details:

- Order Number#**: [Empty field]
- Order to**: Your Blood Center, Address, City, State
- Order from**: Hospital: Hospital A 0000099999, ROUTINE
- Total products**: 6 (0, 2, 4)
- Product List**:

#	Qty	ABO-Rh	Family	Product	Modifiers	Phenotypes	HLA
1	2	Not specified	PLT	Platelets			
2	4	O Pos	RBC	Red Cells			
- COMMENTS (Not for Patient Information)**: One RBC can be short dated, planned transfusion tomorrow.
- Buttons**: BACK, PATIENT, SUBMIT

- Optional: Select “Patient” to enter patient details.

The 'Patient Details' form includes the following fields:

- Last name
- First name
- Patient Maiden Name
- Patient ABO-Rh
- Date of birth (MM/dd/yyyy)
- Gender (Male, Female)
- Buttons**: CONTINUE, CANCEL

- Select Submit.

- Pop-up window will display Order Number. Select “Ok” to return to home page.

### HOW DO I REQUEST DIVIDED PRODUCTS?

ORDER THE TOTAL NUMBER OF PRODUCTS NEEDED. SO, IF YOU NEED 2 UNITS SPLIT INTO 4 COMPONENTS EACH, ENTER 8.

DON'T FORGET TO ALSO ADD THE “DIVIDED” MODIFIER.



## DELIVERY SCHEDULE

This function allows for a **View Only** look at what orders are scheduled for delivery for the selected time frame (today, this week, or this month). The data can be filtered and/or exported to Excel, if needed.

The screenshot shows the 'Delivery Schedule' page. At the top, there's a header with a menu icon, the title 'Delivery Schedule', and a date/time stamp '07/26/2021 14:42:27 US/Arizona'. To the right are icons for help, home, search, and user profile, along with 'Tutorial' and 'Layout' toggle switches. Below the header is a filter bar with a 'Filter' button and a text input field. A callout points to this bar: 'Filter by date range, status, and type.' Below the filter bar are three tabs: 'TODAY', 'WEEK', and 'MONTH'. A callout points to these tabs: 'Select to change time period to view.' To the right of the tabs is a red 'EXPORT TABLE' button. A callout points to it: 'Select here to Export to Excel.' Below the tabs is a table with the following data:

ORDER #	SUBMITTED	DUE DATE	SUBMITTED BY	TYPE	STATUS	ORDERED QUANTITY	SHIPPED QUANTITY
<a href="#">QR21-0110080</a>	07/21/2021 06:41	07/26/2021 08:30	[Redacted]	Ad Hoc Order	Under Approval	5 0 0 5	0 0 0 0

# SERVICES

## SERVICES SEARCH

A. Hover the mouse over icons to display descriptions, as needed.

Services Search

01/23/2019  
10:05:16 US/Mountain









































Tutorial



Layout

Q Filter




CREATE REQUESTEXPORT TABLEPRINT





8 requests match the selected criteria


REQUEST #	ORGANIZATION	DATE	BY	TYPE	TOTAL QTY.	STATUS	COMMENTS	ACTIONS
RE19-0000318		01/22/2019 12:41		Credit Request	1	Approved	 	  
RE19-0000316		01/21/2019 18:39		Credit Request	1	Approved	 	  
RE19-0000314		01/20/2019 18:47		Hospital to Hospital Transfer	1	Delivered	 	  
RE19-0000313		01/20/2019 18:40		Product Return	1	Delivered	 	  
RE19-0000312		01/20/2019 18:34		Product Return	1	Delivered	 	  
RE19-0000310		01/20/2019 17:50		Hospital to Hospital Transfer	1	Delivered	 	  
RE19-0000309		01/20/2019 16:35		Hospital to Hospital Transfer	1	Delivered	 	  
RE19-0000306		01/17/2019 17:49		Product Return	1	Denied	 	  

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ACTIONS

-  Edit, Inquiry, and Print Requests
-  Cancel Request
-  Request cannot be cancelled
-  Request History

- B. Select the Edit Request ()Icon to print the request. This document will be the packing list, which must be include in your shipment of products or samples.
- C. Status can be seen in the status column of the Services Search window.
- D. Selecting “Request History” from this screen, will provide a detailed history of the order, if needed.
- E. From the Services Search window, you can select “Create Request” to access the Service Request Menu. See specific service requests sections of this user guide for associated directions on completing these activities.

## PRODUCT RETURN

Service Request

03/05/2020 14:28:39 US/Arizona

Request to  
Your Blood Center  
Address  
City, State

Request from  
Hospital A 0000099999  
PRODUCT RETURN

Reason  
RETURN - Routine Stock Exchange

Product Return Comments

Donation #  
W04231900000700D

Product Code  
E0276

1. Enter Reason. Include comments below, as needed.

2. Enter Donation # and Product Code for each product.

3. Add Line, as needed.

4. Select Confirm, once all returns have been added.

ADD LINE

DONATION #	PRODUCT CODE	PRINCIPLE	REASON

BACK CONFIRM

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Service Request

01/25/2019 16:40:36 US/Mountain

Request to  
Your Blood Center  
Address  
City, State

Request from  
Hospital A 0000099999  
PRODUCT RETURN

5. Check this box to document your attestation of the statement.

DONATION #	PRODUCT CODE	PRINCIPLE	REASON
W04231900000700D	E0276	Return	RETURN - Routine Stock Exchange

All blood components were stored and handled at our facility in accordance with current regulations. ☒

DELETE EDIT

ADD LINE SUBMIT

6. Select Submit.

### ONE MORE REASON TO USE A SCANNER

YOU CAN BYPASS STEP 3 - ADD LINE, AS MOST SCANNERS ARE SET UP TO INCLUDE A RETURN AFTER THE SCAN, WHICH WILL AUTOMATICALLY ADD THE LINE IN SERVICE REQUESTS.

## PRODUCT RETURN (CONT'D)

Service Request

01/25/2019  
16:45:55 US/Mountain

Tutorial

Layout

Request to  
Your Blood Center  
Address  
City, State

Request from  
Hospital A 0000099999  
PRODUCT RETURN

SUBMITTED

UNDER APPROVAL

REQUEST #: RE19-0000336 (01/25/2019 16:40:23)					
DONATION #	PRODUCT CODE	PRINCIPLE	REASON	REMARK	STATUS
W0423190000700D	E0276	Return	RETURN - Routine Stock Exchange		Submitted

All blood components were stored and handled at our facility in accordance with current regulations. ☒

BACK

REQUEST HISTORY

PRINT

7. Select Print.

Status: Under Approval

Request to  
PHX9 AZ - Scottsdale 1001

Request from  
Hospital A 0000099999  
PRODUCT RETURN

Request #: RE20-0000039 (03/05/2020 14:59:17)				
Donation #	Product Code	Principle	Reason	REMARK
W04101910547800*	E3587	Return	RETURN - Routine Stock Exchange	

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INCLUDE THIS PRINTED COPY OF THE RETURN REQUEST PAGE IN YOUR SHIPMENT. THIS WILL SERVE AS YOUR PACKING LIST FOR THE SHIPMENT.

## CREDIT REQUEST

Service Request

03/05/2020 15:51:51 US/Arizona

Tutorial Layout

Request to

Your Blood Center  
Address  
City, State

1. Select Reason.

Reason

CR - Damaged Bag

Credit Request Comments

Noted leaking bag while unpacking shipment.

Add comments here, as needed or required.

Request from

Hospital A 0000099999

CREDIT REQUEST

Donation #

W0423190000500

Product Code

E0276V00

2. Enter Donation # and Product Code for each product.

Add Line, as needed.

ADD LINE

DONATION #	PRODUCT CODE	REASON	COMMENT

BACK

CONFIRM

3. Select Confirm, once all credit requests have been added.

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Service Request

01/25/2019 17:04:32 US/Mountain

Tutorial Layout

Request to

Your Blood Center  
Address  
City, State

Request from

Hospital A 0000099999

CREDIT REQUEST

DONATION #	PRODUCT CODE	REASON	REMARK
W0423190000500H	E0276	CR - Damaged Bag	Noted leaking bag while unpacking shipment.

DELETE

EDIT

ADD LINE

SUBMIT

4. Select Submit, if credit request is complete and accurate.

# HOSPITAL TO HOSPITAL TRANSFER

## SENDING HOSPITAL

Service Request

03/30/2020 13:40:55 US/Mountain

Transfer To

Transfer From  
HOSPA 00000HOSPA  
HOSPITAL TO HOSPITAL TRANSFER

1. Complete this section.

Organization  
HOSPB 00000HOSPB

Donation #  
W042419008270009

Product Code  
E4533

Hospital to Hospital Transfer Comments

Add Comments here, as needed.

2. Select Add Line, as needed.

ADD LINE

DONATION #	PRODUCT CODE	REASON	COMMENT	ORGANIZATION
No records have been found.				

3. Select Confirm, once all products have been added.

BACK CONFIRM

Service Request

03/30/2020 13:46:44 US/Mountain

Transfer To  
HOSPB 00000HOSPB

Transfer From  
HOSPA 00000HOSPA  
HOSPITAL TO HOSPITAL TRANSFER

DONATION #	PRODUCT CODE	REASON	ORGANIZATION
W042419008270009	E4533	TRANSFER - HWBO	HOSPB 00000HOSPB

4. Check this box to document your attestation.

All blood components were stored and handled at our facility in accordance with current regulations ☒

DELETE EDIT ADD LINE SUBMIT

5. Select Submit, if transfer information is complete AND correct.

Transfer Request Details

DONATION #	PRODUCT CODE	ORGANIZATION	REASON	REMARK
W042419008270009	E4533	HOSPB 00000HOSPB	TRANSFER - HWBO	

CONFIRM AND PRINT CONFIRM BACK

6. Select Confirm and Print.

The printout serves as a packing slip, if needed.

## RECEIVING HOSPITAL

Complete [Product Reception using Donation Number](#) to complete the transfer.

**FOR A HOSPITAL MODIFIED PRODUCT, USE ORIGINAL PRODUCT CODE AND INCLUDE A COMMENT EXPLAINING MODIFICATION AND NEW PRODUCT CODE.**

**HOSPITAL TO HOSPITAL TRANSFER CANNOT BE USED FOR RESERVED BLOOD PRODUCTS (E.G. AUTOLOGOUS OR DIRECTED).**

# RECONCILIATION

## PRODUCT RECEPTION

### USING SHIPMENT NUMBER

Product Reception

08/22/2019 12:21:05 US/Arizona

Product reception  
Your Blood Center  
Address  
City, State

Shipment / Donation Number#  
0000012134603

SHIPMENT NUMBER# DONATION NUMBER# - PRODUCT CODE#

RECEIVED QUANTITY O POS A POS B POS AB POS O NEG A NEG B NEG AB NEG

ACCEPT ALL REFUSE ALL

ADD CANCEL CONFIRM

*Shipment Receipt (Vitalant logo) showing Shipment Number 0000012134603 and Product Code 0000012134603.*

Product Reception

12/09/2019 08:21:51 US/Pacific

Product reception  
Your Blood Center  
Address  
City, State

Hospital:  
HOSPA 00000HOSPA

Shipment / Donation Number#  
0000012134603

Received Quantity:  
3

SHIPMENT NUMBER# DONATION NUMBER# - PRODUCT CODE# ACCEPT REFUSE TOTAL ORDERED ORDER / SERVICE REQUEST # RECEIVED QUANTITY O POS A POS B POS AB POS O NEG A NEG B NEG AB NEG

No items scanned

ACCEPT ALL REFUSE ALL

ADD CANCEL CONFIRM

2. If shipment number was used, this field will open. Enter the number of products received with this shipment.

3. Select Add.



## PRODUCT RECEPTION (CONT'D)

Product Reception

01/25/2019 16:23:09 US/Mountain

Product reception  
Your Blood Center  
Address  
City, State

Hospital:  
Hospital A 0000099999

Shipment / Donation Number#

4. Accept or Refuse products by selecting them individually...

SHIPMENT NUMBER#	SHIPMENT NUMBER# - PRODUCT CODE#	ACCEPT	REFUSE	TOTAL ORDERED	ORDER/ SERVICE REQUEST #	RECEIVED QUANTITY	O POS	A POS	B POS	AB POS	O NEG	A NEG	B NEG	AB NEG
	W0423190000600F - E0276	<input type="checkbox"/>	<input type="checkbox"/>		OR19-0000156		1							
	W04231900000700D - E0276	<input type="checkbox"/>	<input type="checkbox"/>		OR19-0000156		1							
	W04231900000500H - E0276	<input type="checkbox"/>	<input type="checkbox"/>		OR19-0000156			1						

\*\*Shipment received with an acceptable packing configuration and temperature. Each component was visually inspected and found to be acceptable.

...or as a whole.

ACCEPT ALL REFUSE ALL ADD CANCEL CONFIRM

Product Reception

08/22/2019 12:45:33 US/Arizona

Product reception  
PHX9 AZ - Scottsdale 1001  
6220 E Oak St  
SCOTTSDALE, AZ

Hospital:  
HOSPA 00000HOSPA

Shipment / Donation Number#

SHIPMENT NUMBER#	DONATION NUMBER# - PRODUCT CODE#	ACCEPT	REFUSE	TOTAL ORDERED	ORDER/ SERVICE REQUEST #	RECEIVED QUANTITY	O POS	A POS	B POS	AB POS	O NEG	A NEG	B NEG	AB NEG
	W04101933653500W - E0332	<input checked="" type="checkbox"/>	<input type="checkbox"/>		OR19-0003721		1							
	W04101900293700F - E0336	<input checked="" type="checkbox"/>	<input type="checkbox"/>		OR19-0003721		1							
	W04101960338500H - E0382	<input checked="" type="checkbox"/>	<input type="checkbox"/>		OR19-0003721									

\*\*Shipment received with an acceptable packing configuration. Each component was inspected and found to be acceptable.

5. Select Confirm, once all shipment/products have been received.

ACCEPT ALL REFUSE ALL ADD CANCEL CONFIRM

## USING DONATION NUMBER

Product Reception

08/22/2019 12:59:53 US/Arizona

Product reception  
Your Blood Center  
Address  
City, State

Hospital:  
HOSPA 00000HOSPA

Shipment / Donation Number#

1. Scan (or enter) Donation Number

W04101960338500H

SHIPMENT NUMBER#	DONATION NUMBER# - PRODUCT CODE#	ACCEPT	REFUSE	TOTAL ORDERED	ORDER/ SERVICE REQUEST #	RECEIVED QUANTITY	O POS	A POS	B POS	AB POS	O NEG	A NEG	B NEG	AB NEG
No items scanned														

ACCEPT ALL REFUSE ALL ADD CANCEL CONFIRM

Note: When hand keying a donation number you will want to press ENTER or TAB to open the next field.

## PRODUCT RECEPTION (CONT'D)

Product Reception

08/22/2019 13:05:43 US/Arizona

Product reception  
Your Blood Center  
Address  
City, State

Hospital:  
HOSPA 00000HOSPA

Shipment / Donation Number#  
W04101960338500H

Product code  
E0382V0Q

2. Scan (or enter) Product Code

SHIPMENT NUMBER#	DONATION NUMBER# - PRODUCT CODE#	ACCEPT	REFUSE	TOTAL ORDERED	ORDER/ SERVICE REQUEST #	RECEIVED QUANTITY	O POS	A POS	B POS	AB POS	O NEG	A NEG	B NEG	AB NEG
No items scanned														

3. Select Add

ACCEPT ALL REFUSE ALL ADD CANCEL CONFIRM

Product Reception

08/22/2019 13:08:08 US/Arizona

Product reception  
Your Blood Center  
Address  
City, State

Hospital:  
HOSPA 00000HOSPA

Shipment / Donation Number#  
|

4. Accept or Refuse products by selecting them individually...

SHIPMENT NUMBER#	DONATION NUMBER# - PRODUCT CODE#	ACCEPT	REFUSE	TOTAL ORDERED	ORDER/ SERVICE REQUEST #	RECEIVED QUANTITY	O POS	A POS	B POS	AB POS	O NEG	A NEG	B NEG	AB NEG
	W04101960338500H - E0382	<input type="checkbox"/>	<input type="checkbox"/>		OR19-0003721						1			

\*\*Shipment received with an acceptable packing configuration. Each component was inspected and found to be acceptable.

...or by shipment

ACCEPT ALL REFUSE ALL ADD CANCEL CONFIRM

Product Reception

08/22/2019 13:11:30 US/Arizona

Product reception  
Your Blood Center  
Address  
City, State

Hospital:  
HOSPA 00000HOSPA

Shipment / Donation Number#  
|

SHIPMENT NUMBER#	DONATION NUMBER# - PRODUCT CODE#	ACCEPT	REFUSE	TOTAL ORDERED	ORDER/ SERVICE REQUEST #	RECEIVED QUANTITY	O POS	A POS	B POS	AB POS	O NEG	A NEG	B NEG	AB NEG
	W04101960338500H - E0382	<input checked="" type="checkbox"/>	<input type="checkbox"/>		OR19-0003721									

\*\*Shipment received with an acceptable packing configuration. Each component was inspected and found to be acceptable.

5. Select Confirm, once all products have been received.

ACCEPT ALL REFUSE ALL ADD CANCEL CONFIRM

# STOCK

## CURRENT STOCK DETAILS

The Current Stock Details screen shows all products that have been received in Product Reception.

Stock Details

01/24/2019  
13:46:00 US/Mountain





























































Tutorial

Layout







Q Filter

PRINTEXPORT

< 1 2 3 4 5 6 7 >

DONATION NUMBER	PRODUCT	BLOOD GROUP	EXPIRATION	STATUS	ACKNOWLEDGEMENT STATUS	EXPIRATION FLAG	BLOCKING FLAG	ATTRIBUTES	ACTIONS
W03621862282400K	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	08/05/2019 23:59	Used	In transit			M P H R	     
W03621862956400R	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	08/05/2019 23:59	Return related	Accepted			M P H R	     
W036218633657007	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	08/05/2019 23:59	Return related	Accepted			M P H R	     
W03621862547200P	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	08/04/2019 23:59	Return related	Accepted			M P H R	     
W03621862973800F	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	08/04/2019 23:59	Used	Accepted			M P H R	     
W03621861068700X	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	07/27/2019 23:59	Available	Accepted			M P H R	     
W04101810636800C	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	AB Neg	07/27/2019 23:59	Available	In transit			M P H R	     
W03621863400900I	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	07/26/2019 23:59	Available	Accepted			M P H R	     
W03621863052000F	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	07/25/2019 23:59	Available	Accepted			M P H R	     
W03621863054100S	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	07/25/2019 23:59	Available	Accepted			M P H R	     

< 1 2 3 4 5 6 7 >

ACTIONS	
	Product details
	Product history
	Request details
	Request history
	Mark as used
	Mark as available

## CURRENT STOCK DETAILS (CONT'D)

This function can be filtered to assist with your search for a specific product, using the various fields. Below is an example of filtering for products that have been transferred.

Stock Details

03/05/2020  
16:08:15 US/Arizona

Tutorial

Layout

Filter

Filters applied

Status

ABO Rh

Select Option:

Product Family

Select Option:

Donation number

Product Code

Select Option:

Status

Transferred

Show used

Show transferred

Show returned

Stock with modifiers

Stock with phenotypes

Stock with HLA

Acknowledgement Status

Select Option:

Modifiers

Select Option:

Show expired









Show credit related

RESET

SEARCH

PRINT

EXPORT

DONATION NUMBER	PRODUCT	BLOOD GROUP	EXPIRATION	STATUS	ACKNOWLEDGEMENT STATUS	EXPIRATION FLAG	BLOCKING FLAG	ATTRIBUTES	ACTIONS
W042419012075005	POOLED CRYO AHF None/≤-18C E3587 (E3587V00)	O Pos	07/25/2020 23:59	Transferred	Accepted			M P H R	   
W036219020443001	RBC CP2D=AS3/500mL/LR-Slg6 E0382 (E0382V00)	A Neg	03/30/2020 23:59	Transferred	Accepted			M P H R	   

vitalant

MAK-SYSTEM

INTERNATIONAL GROUP

# AFFILIATE HOSPITALS STOCK

## AFFILIATES STOCK DETAILS

This screen lets you see the specific products in affiliated hospitals' inventory.

Stock Details

01/24/2019  
15:05:55 US/Mountain

Affiliates stock details

Your Hospital

Q Filter

PRINT

EXPORT

DONATION NUMBER	ORGANIZATION	PRODUCT	BLOOD GROUP	EXPIRATION	STATUS	ACKNOWLEDGEMENT STATUS	EXPIRATION FLAG	BLOCKING FLAG	ATTRIBUTES
W036218633756001	Location the blood is at	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	08/12/2019 23:59	Available	Accepted			M P H R
W03621863375800Y	Location the blood is at	PLASMA CP2D <=18C FRZ<=24h E2619 (E2619V00)	A Pos	08/12/2019 23:59	Available	Accepted			M P H R

# USER MANAGEMENT

*(Access only available to Customer Portal Hospital Account Administrators)*

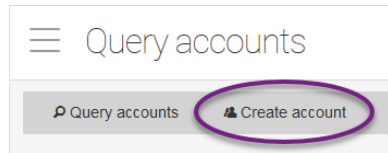
## REQUIREMENTS

- A. One person per login
  - a. Accounts cannot be shared by multiple people.
  - b. If the individual works at more than one organization, they will need separate logins for each organization.
  - c. An account must be deactivated within 24-48 hours if the person no longer requires access (i.e. no longer works for the organization or changes to a new position that no longer requires access to the program).
- B. Username (minimum 6 characters in length) and is case sensitive.
- C. Temporary password requirements
  - a. At least 8 characters in length
  - b. Contain numbers, letters (both upper and lower case), and special characters
- D. Can be a shared email address, if need be. Please ensure \*vitalant.org email domain has been added to your Safe Sender List by your IT department to ensure account emails can be received by your staff.
- E. User profile descriptions
  - a. Hospital lite user – provides view only security.
  - b. Hospital user – provides access to orders, services, reconciliations, and stock.
  - c. Hospital Account Admin – everything a hospital user can do, plus user management. Please contact your blood center for assistance in managing user accounts with this profile.

## PROCESS OF CREATING A NEW ACCOUNT

1. Select “User Management” from menu.

2. Select “Create Account.”



3. Enter required fields for the individual (all fields but password hint are required).

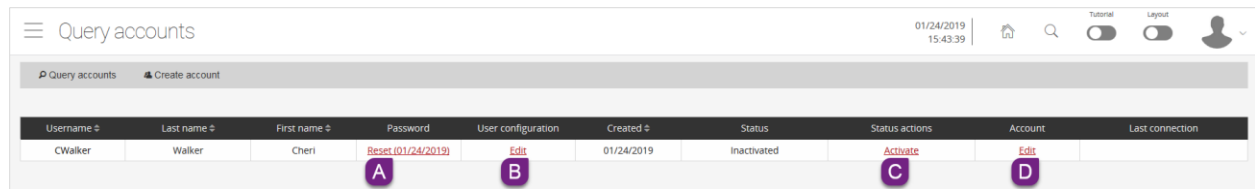
A screenshot of the 'Create account' form in the web application. The form is titled 'Query accounts' and has a 'Create account' button in the top right. The form contains the following fields: First name (Cheri), Last name (Walker), Username (CWalker), Confirm username (CWalker), Password (masked with dots), Confirm password (masked with dots), Password hint (Enter password hint message), Email (CWalker@hospital.org), Confirm email (CWalker@hospital.org), User Profile (Hospital user), Organization Type (Specific Hospital), and Organization (Hospital A 0000099999 - CY99 WY - Cheyenne 2303). A red 'SUBMIT' button is at the bottom right.

4. Select “Submit.”

5. Activate the user by locating them in the list and clicking “Activate”, OR they can use the email sent to them to activate their own account.

Username	Last name	First name	Password	User configuration	Created	Status	Status actions	Account	Last connection
CWalker	Walker	Cheri	Reset (01/24/2019)	Edit	01/24/2019	Inactivated	Activate	Edit	

## MODIFYING ACCOUNTS



The screenshot shows a web application interface titled "Query accounts". At the top right, there is a date and time display (01/24/2019 15:43:39) and several icons including a home button, a search icon, and toggle switches for "Tutorial" and "Layout". Below the header, there is a sub-header bar with "Query accounts" and a "Create account" button. The main content is a table with the following columns: Username, Last name, First name, Password, User configuration, Created, Status, Status actions, Account, and Last connection. A single row of data is visible for user "CWalker". Callouts A, B, C, and D are placed below the table cells: A points to the "Reset (01/24/2019)" link in the Password column; B points to the "Edit" link in the User configuration column; C points to the "Activate" link in the Status actions column; and D points to the "Edit" link in the Account column.

Username	Last name	First name	Password	User configuration	Created	Status	Status actions	Account	Last connection
CWalker	Walker	Cheri	<a href="#">Reset (01/24/2019)</a>	<a href="#">Edit</a>	01/24/2019	Inactivated	<a href="#">Activate</a>	<a href="#">Edit</a>	

- A. Password – Reset passwords for individuals.
- B. User configuration – allows for modifications to user profiles and associated hospitals.
- C. Status – Indicates the user access rights to the system.
  - a. “Activated” means currently has access to the system.
  - b. “Inactivated” means the user is temporarily locked out of the system. This status is automatically applied when the user has multiple log in failures.
  - c. “Deactivated” means the user has been intentionally locked out of the system. The lock out lasts until the account is Activated.
- D. Status actions – these action links allow for modification of the users access status as described above.
- E. Account – allows modification of user information, such as first and last name, and email address. Username and organization cannot be modified.



## IT PREPARATION FOR IMPLEMENTATION

Add \*vitalant.org email domain to your Safe Sender List – This will ensure account set up and password reset emails make it through SPAM filters.

Scanners – Although you can hand key information into the Portal, a scanner is recommended for efficiency.

- It is recommended that it is a 2D scanner
- Must allow for scanning in applications outside of LIS
- Needs to be able to read Code 128 barcode symbology
  - Here is an example barcode to test your current scanner, as needed.


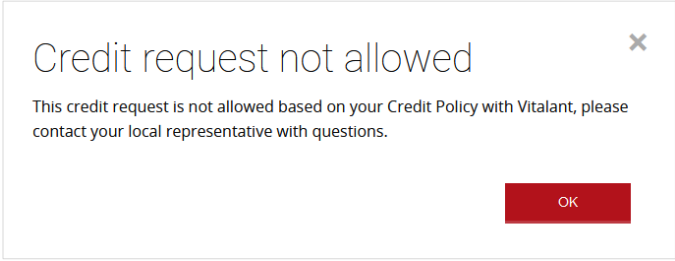
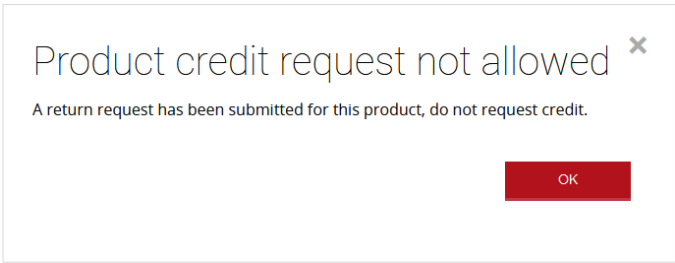


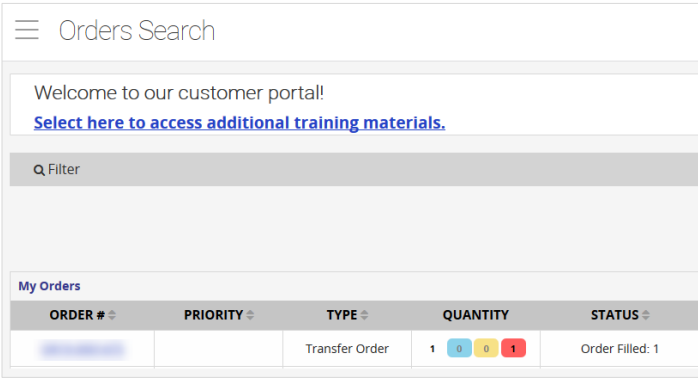
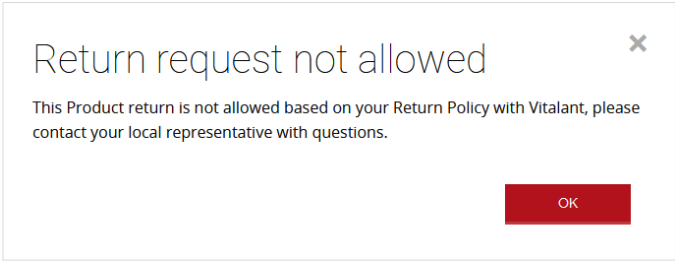
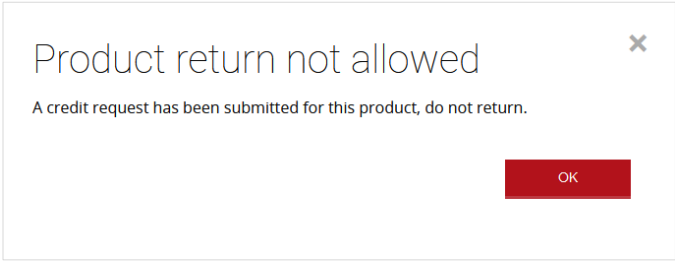
Should read: 0000012134603

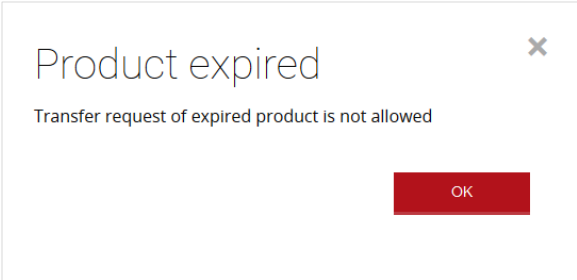
Browsers – The following internet browsers may be used.

- Google Chrome
- Mozilla Firefox
- Microsoft Edge

## TROUBLESHOOTING

Process	Message	Description	Resolution
Creating Order		Cannot locate cryo on product list.	<p>Ensure plasma or RBC family is not selected, prior to selecting product tab.</p> <p>Cryo is configured as part of the platelet family.</p>
Credit Request		The Customer Portal is configured to require credit requests be initiated no more than 7 days after the product expires.	Due to accounting requirements, these requests must be completed within the configured timeframe.
Credit Request		This message will display if you try to request a credit for a product that has a return request already submitted.	<p>If the product is usable, do not proceed with the credit request.</p> <p>If the product is not usable, cancel the return request and proceed with the credit request, if appropriate.</p>

Process	Message	Description	Resolution
Order Search		<p>“Transfer Order” listed on Order Search Screen.</p> <p>This appears when a hospital to hospital transfer is initiated, but has not been reconciled by the receiving hospital.</p>	<p>If you have received the unit(s), please complete product reception to update the location of the product.</p> <p>If you did not end up receiving the unit(s), contact Vitalant to help correct the transfer.</p>
Return Request		<p>The Customer Portal is configured with your hospital’s contract requirements. This message will appear if the request does not comply with the contract.</p> <p>Example: Contract does not allow return of short dated products and request is made with less than 14 days on a Red Cell product.</p> <p>Example: Frozen product may not be allowed for return based on your contract.</p>	<p>If there are questions about return privileges, please contact your blood center.</p>
Return Request		<p>This message will display if you try to return a product that has a credit request already submitted for it.</p>	<p>If the product is usable, cancel the credit request and then submit the return request.</p> <p>If the product is not usable, do not proceed with the return request.</p>

Process	Message	Description	Resolution
Hospital to Hospital Transfer	 A white dialog box with a grey border and a close button (X) in the top right corner. The title is "Product expired" in a large, dark font. Below the title is the message "Transfer request of expired product is not allowed" in a smaller, dark font. At the bottom center is a red button with the text "OK" in white.	This message will display if you try to transfer an expired product in the Customer Portal.	The Customer Portal does not support transferring products past their expiration date. Use internal processes for products that have been modified to extend their expiration dates.

***IF YOU HAVE FURTHER QUESTIONS OR CONCERNS,  
PLEASE CONTACT YOUR BLOOD CENTER FOR  
INDIVIDUALIZED SUPPORT.***