

## Logging into i3screen

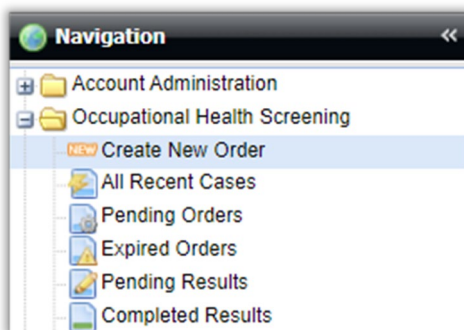
The web address to access i3screen is <https://i3screen.net/login/>.

Log in using the username and password that was provided.

A password can be reset by selecting "Click Here" next to "Forgot your password?"



## Create New Order



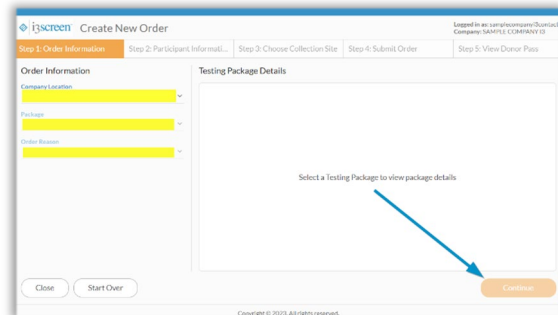
After logging into the system, click on the expander (⊕) next to Occupational Health Screening under Navigation in the upper left-hand corner.

Click on Create New Order to start a new order. This will open a new browser tab. There will be 5 steps when scheduling for a donor or 3 steps if the Scheduling Link is sent via email or text to the donor.

### Step 1: Order Information

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.

Click Continue to move on to Step 2.



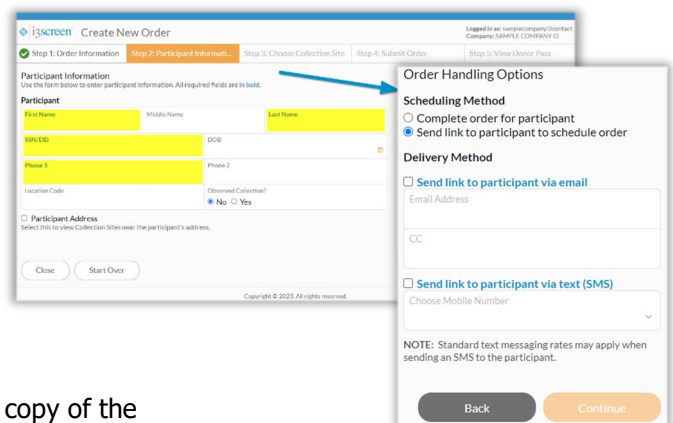
### Step 2: Participant Information

Enter the required participant information as indicated with blue font. The SSN/EID needs to be a minimum of 5 characters and can be alpha-numeric. DOT-FMCSA orders require the CDL number in the required state format.

Select the scheduling method on the right. Options include:

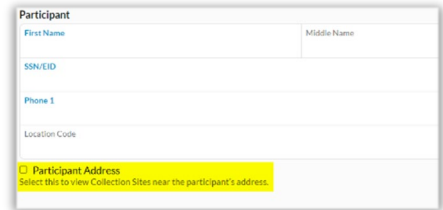
- Completing the order and selecting the collection site for the participant.
- Sending the link to the participant to select their collection site via email or text, if enabled.

Enter additional email addresses into the CC field to receive a copy of the scheduling link or donor pass.



**Step 2: Participant Information (Continued)**

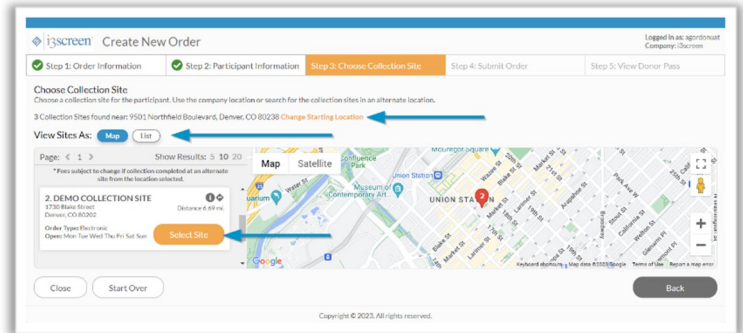
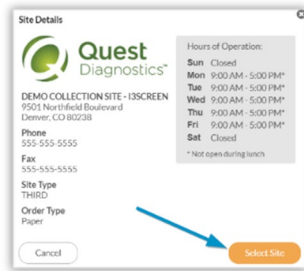
The collection site search starting location defaults to the Company Location. Select Participant Address to add the donor address if preferred. The collection site search location can be modified in Step 3.



**Step 3: Choose a Collection Site**

Review the available collection sites. The Starting Location can be changed from the initial address by clicking Change Starting Location. Toggle between Map and List views as desired.

Click Select Site to view more Site Details.

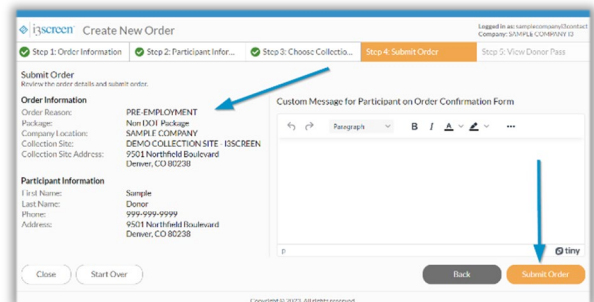
Click Select Site again to confirm that this is the preferred collection site and proceed to Step 4.

**Step 4: Submit Order**

Review the Order and Participant Information. If anything needs to be changed or corrected, click Back to go to previous steps.

Additional details can be added to the Donor Pass for this order in the Custom Message Field.

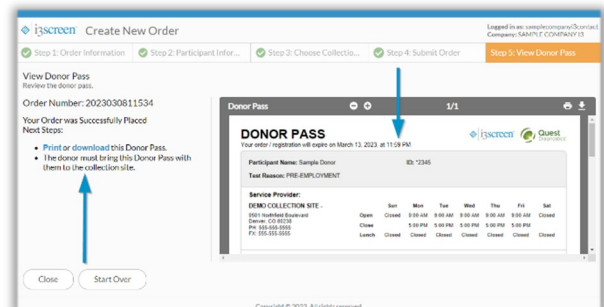
Click Submit Order to advance to Step 5. This will place the order and generate the Donor Pass.



**Step 5: View Donor Pass**

Once the order has been submitted, the Donor Pass will display and can be printed or downloaded. Instruct the donor to take the Donor Pass to the collection site.

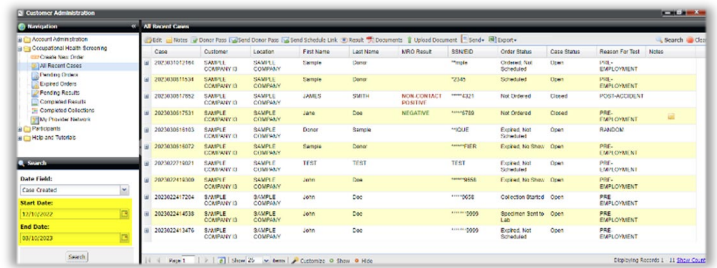
If the order has a barcode and the Donor Pass was emailed, the participant can provide the barcode to the collector using their smartphone.



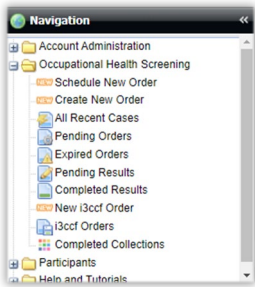
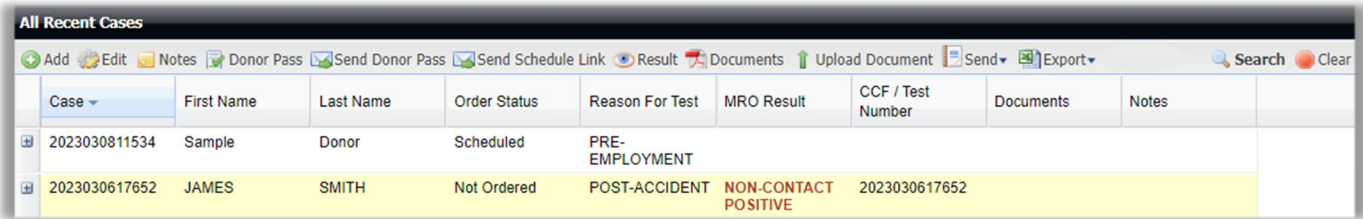
### Viewing and Managing Results

The All Recent Cases grid shows all cases at every stage of the process, including completed results. The default filter for this grid is 90 days.

The MRO Result Column displays the result for closed cases and the Order Status Column displays the status of cases e.g., Ordered, Not Scheduled.

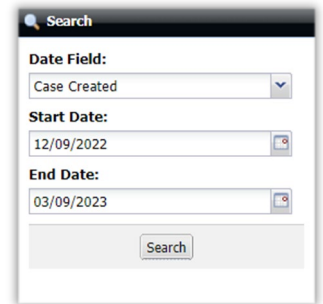


The buttons at the top provide additional options for viewing results, depending on the user permission level. From left to right, the options are Add a Result, Edit a Case, Add Notes, View the Donor Pass, Send the Donor Pass, Resend the Schedule Link, View a Result, View Documents, Upload a Case Document, Resend Results, Export a Spreadsheet, or Search for a Specific Result.



There are additional grids under Navigation in addition to All Recent Cases – Pending Orders, Expired Orders, Pending Results, and Completed Results. These grids filter to the corresponding case statuses in the system.

Directly under Navigation is the ability to search for cases older than the indicated Start and End Date. Change the Start Dates and then click Search to refresh the grid and display the cases from the selected time period.



Each of the grids can be customized depending upon user preferences. Columns can be added or removed as well as moved to a preferred position with the grid layout.

To add and remove columns, hover over a column and click on the ▼ symbol, mouse to Columns and then select and deselect to add or remove them. Click, hold, and drag to move columns. When all view changes are completed, click Customize at the bottom and then Save the new Grid Preferences.

