Clinician/Collector | User Guide

Welcome to Shadowbox! Shadowbox is committed to providing you with the best service. If you have any questions, please reach out to us at the contact information provided at the end of the guide.

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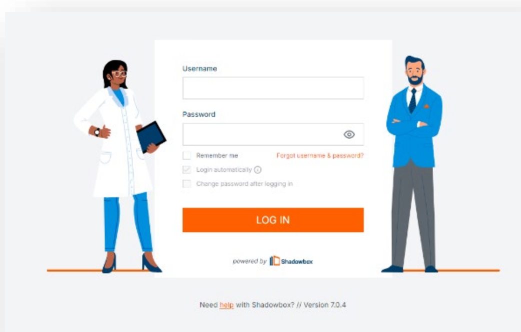
**Please note this is a user guide and does contain graphics from Shadowbox-powered applications. These graphics are for demonstration purposes and may appear different in your application.*

** Always refer to the instructions provided by your associated ancillary care facility (e.g., lab, imaging center, hospital) when completing requisition forms.*

Logging In

a. **Click on your associated ancillary care facility's Shadowbox Iris application.** The application icon is likely located on your desktop, your task bar, or in your downloads folder. If you are having issues with the installation or finding the application, please refer to the installation instructions.

b. **Enter your Username and Password**. Your Username and your password will be provided to you by Shadowbox. It is recommended that you update the password after logging in for the first time. Once complete, click **'LOG IN.'**



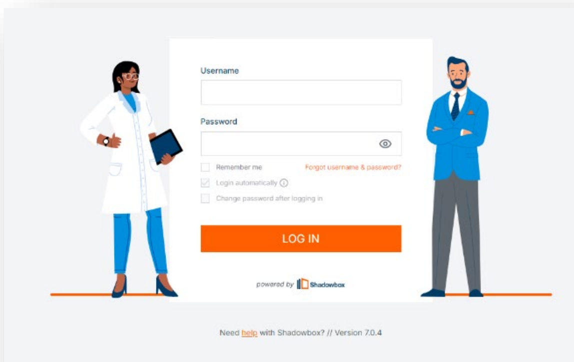
Remember me – If checked, the application will store the credentials locally on the computer.
Login automatically – If checked, this will automatically log in the user once Shadowbox is opened.
Change password after login – If checked, this will prompt the user to update their password after clicking **'LOG IN.'** It is recommended that you update the password provided by Shadowbox upon first login.

<u>Note:</u> These passwords are not stored by your associated ancillary care facility. You may reset your Shadowbox password at any time by reaching out to Shadowbox. Contact information is provided at the end of the user guide.

How to Save Credentials

a. **You will be prompted to input two (2) sets of credentials.** The first set, seen in the step above, are your associated ancillary care facility application credentials. The second credentials are for your EHR (Electronic Health Record – also known as Electronic Medical Record, or EMR).

   i. The first set of credentials required to login to your associated ancillary care facility's Shadowbox Iris app are managed by Shadowbox. Your associated ancillary care facility may or may not have access to update these credentials but you can always reach out to support@shadowbox.com for assistance.

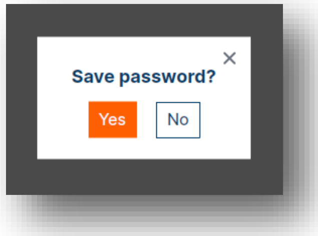


   ii. The second set of credentials (**EHR**) are managed by your EMR/EHR. Shadowbox and your associated ancillary care facility do not have access to update/change these credentials.

b. After logged into the app, it will open to your EHR login page. **Log in to your EHR** with your EHR credentials.

c. You may need to complete a two-step verification (for example, your EHR may prompt you to enter a code sent to your mobile phone).

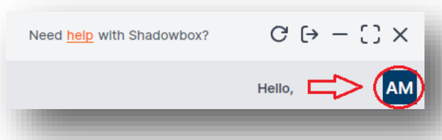
d. The system will ask if you would like to store these credentials. If appropriate based on your protocol, you can **select 'Yes.'**



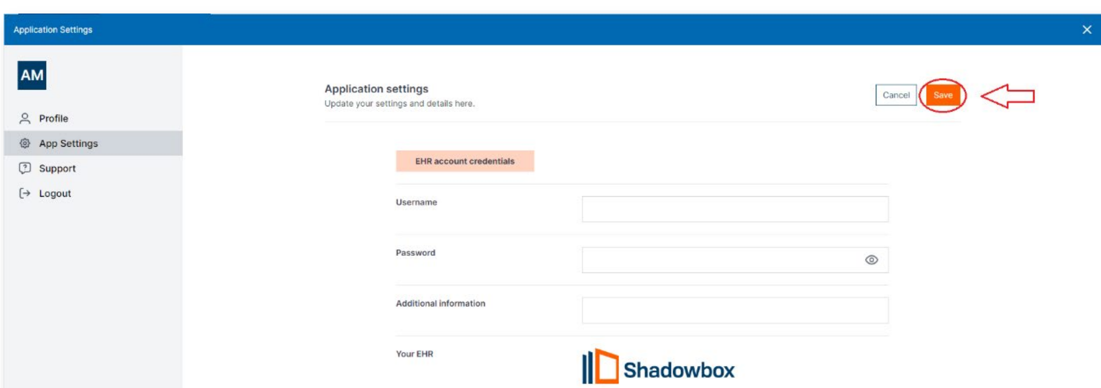
iii. Saving your credentials will not give Shadowbox access to your email address, the credentials will only be stored locally for the user on the desired workstation.

iv. It is recommended to not click **'Yes'** if multiple users access the workstation with workstation specific credentials.

e. To update your EHR credentials, including your password, go to the **profile settings** located in the top right-hand corner of the screen.



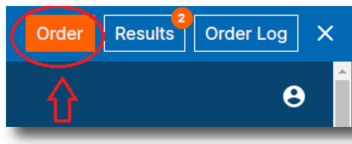
f. Once in the profile settings, click on '**App Settings**' on the left-hand side. Once you've updated your EHR credentials, click '**Save**.'



How to Place an Order

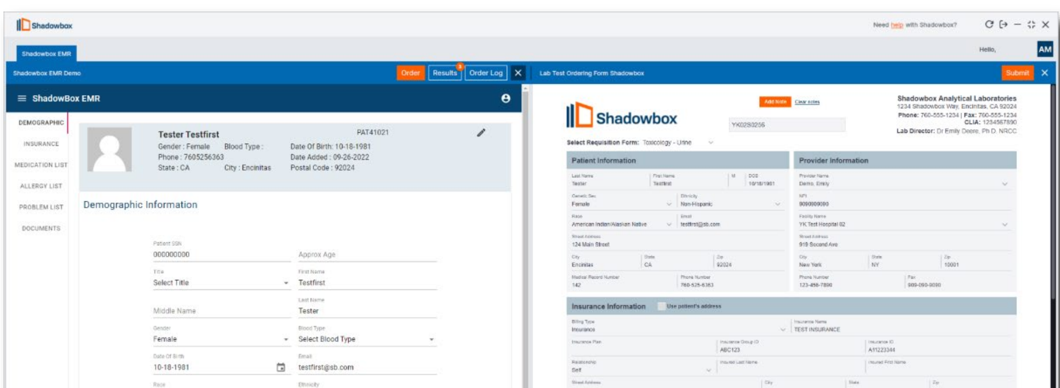
a. To begin an order, access the **patient chart** in the EHR displayed within your associated ancillary care facility's app. This generally requires searching for the patient, then clicking into the "information", "hub" or "dashboard" tab of their chart.

b. **When ready to order a test, click 'Order'** in the top right-hand corner, as seen below. As a reminder, you need to have the chart open for the patient for whom you want to order a test.

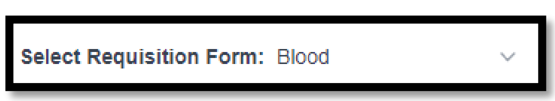


c. Your associated ancillary care facility's app will automatically activate the digitized requisition form alongside the EHR, with the EHR on the left and the digitized requisition form on the right. Certain patient information will automatically transfer from the EHR to the requisition, including but not limited to patient demographic information (patient name, address, date of birth), diagnosis codes, medications, insurance information and clinician information.

You may update the information on the form as needed.



d. Please note that there may be multiple requisition forms available. To select the appropriate form, use the dropdown menu labeled **'Select Requisition Form'** at the top of the form.



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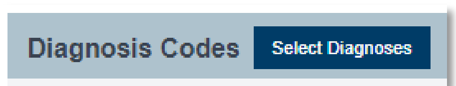
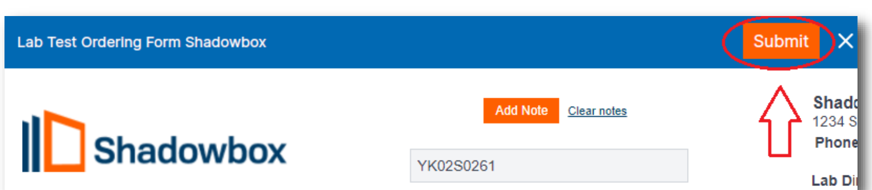
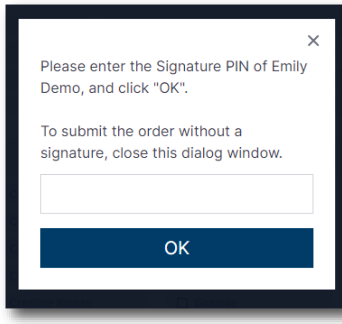
e. You can use the slider in the middle of the application to minimize or maximize either size of the screen for enhanced ordering capabilities. Once adjusted the application will remember your preferred size for the duration of the session.
f. On the digitized requisition located on the right side of the screen, scroll down to enter the necessary information, such as the test order, additional diagnosis codes, or responses to ask at order entry questions.
g. Please note the diagnosis code section. The application may pull over all active diagnosis codes within the patient chart. The diagnosis code button, **'Select Diagnoses'** is designed to display all active diagnosis code in a patient chart. Please note, the search in the pop up is for active diagnosis codes in the patient chart. If you wish to edit the diagnosis codes, it is required to type in the text field, in the correct format, on the requisition with commas to separate the codes. The user will need to click the button to display a list of active diagnosis codes in the patient's chart. Select whichever codes apply to the test order and click **'OK.'**



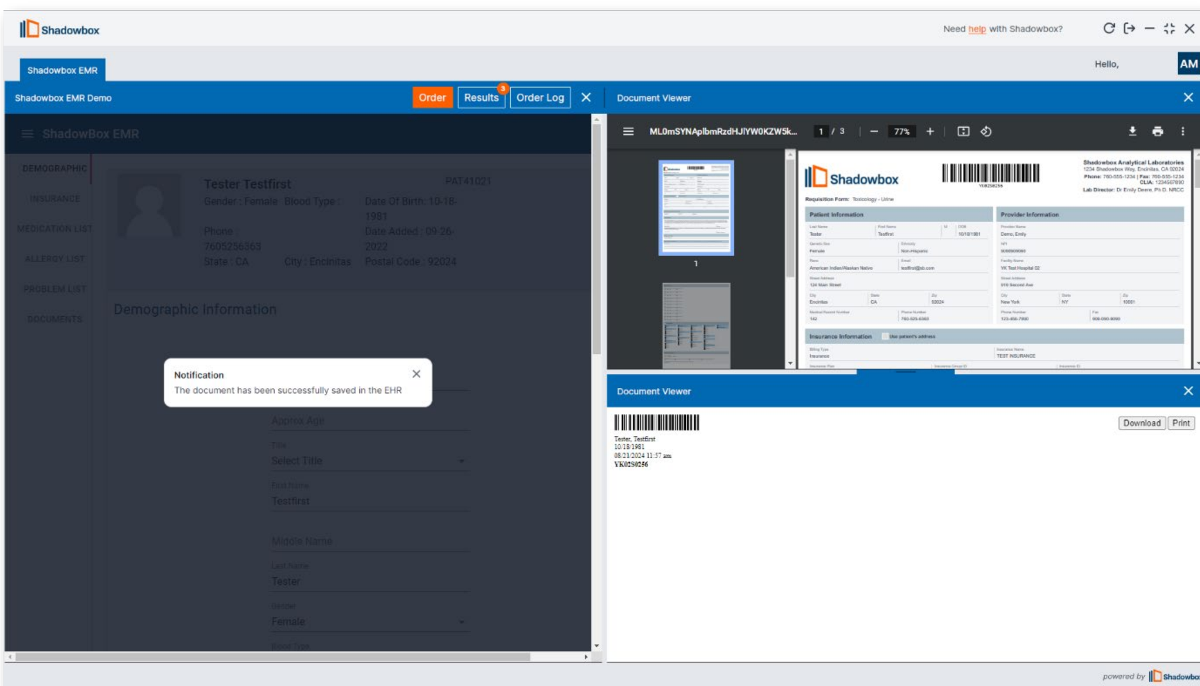
h. Please note the medication section. The process is similar to the diagnosis section. The application may pull over all active medications automatically or provide a button to select whichever medications are relevant to the test order. ** Please be sure to complete the digitized requisition as instructed by your associated ancillary care facility.*
i. The patient's insurance is automatically pulled from the patient's chart and sent to your associated ancillary care facility. The information included is, the subscriber, guarantor, policy ID, and insurance name, and will only appear if active in the patient chart. Please verify all insurance information is up to date and accurate prior to submitting the order. If you have any questions about which information is required to submit, please reach out to your associated ancillary care facility.
j. When finished, click **'Submit' at the top right-hand corner of the screen**. If the requisition is incomplete, you will be prompted to input missing information.



k. If you are a legal designee for the ordering provider and are assigned to be able to add a provider's signature to an order, then you will be prompted to enter your four-digit PIN. This will populate the ordering provider's signature to the submitted requisition form. **A legal designee is a person who is legally allowed by state, local, and federal statute to order testing and append physician signature. The requirements for who can be the legal designee of a clinician and thereby allowed to order and append physician signature vary by state and local law.*



l. Once a requisition is submitted, it **will convert to a PDF file that will appear for you to review.** The order is electronically sent to your associated ancillary care facility and a PDF file to the EHR.

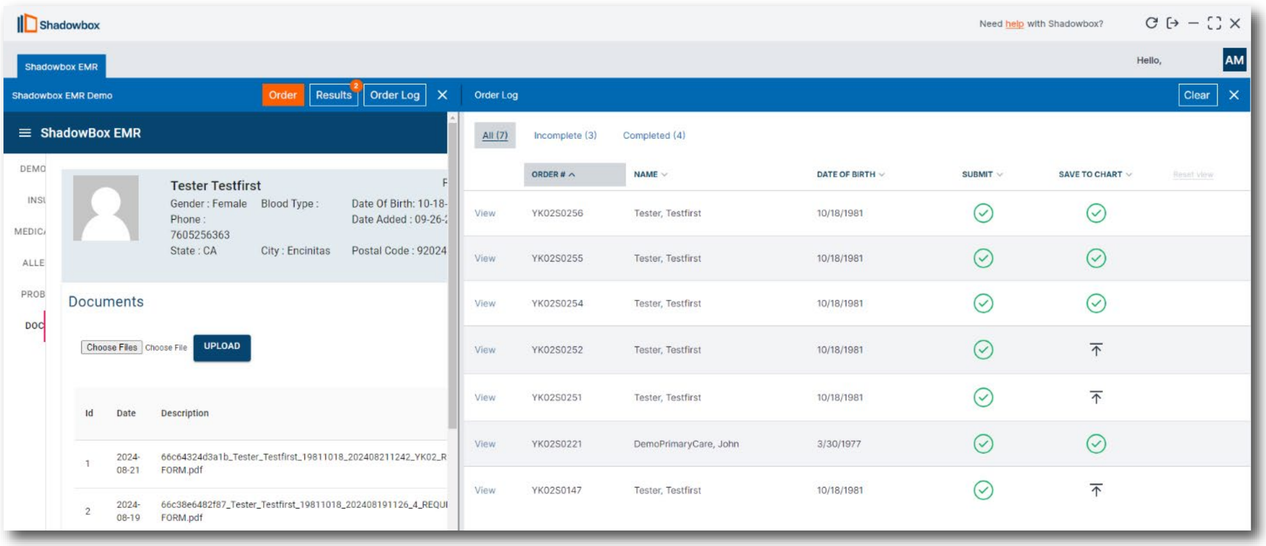


**Note your application may also provide you with a printable barcode label that you can print directly from your barcode label printer.*

m. If needed, you can print and/or download the document by doing so on the right-hand side.
n. Upon closing the document viewer, the barcode label will not be available to print. If a printer is unavailable at the time of order, it is recommended to download a copy to print later.

How to View Order Log

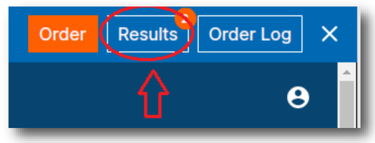
a. You can view the status of submitted orders and confirm that they were successfully submitted and successfully saved to the EHR in the order log.
b. Submitted orders will be presented in a list and labeled as **Incomplete and Completed**.



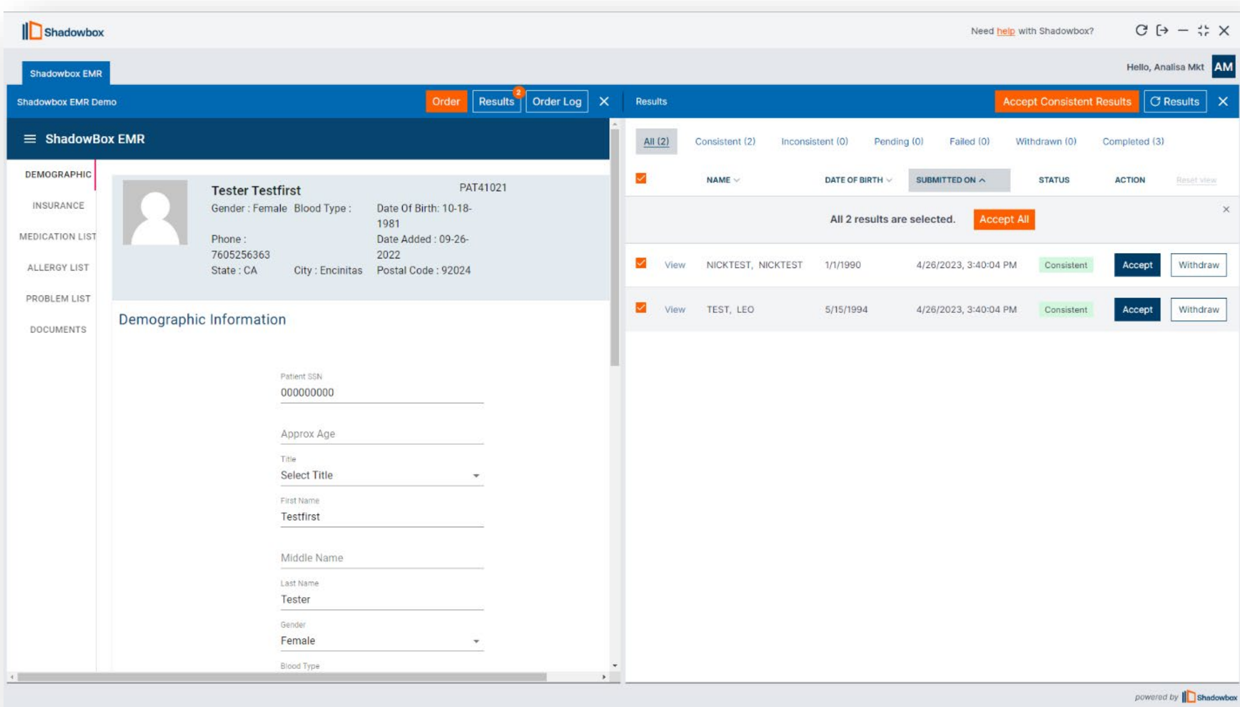
c. If an order is **not submitted** or **uploaded to the EHR successfully**, you can make further attempts to upload the document directly from the order log.
d. You can also view the timestamp of when an order was successfully submitted and saved to the EHR by hovering over the green checkmark next to the order information.
e. Orders cannot be edited once submitted. If you'd like to print a copy of the log, simply right-click on the screen and select '**Print to PDF or printer**.'

How to Review Results

a. To view results, you will need to click **'Results'** in the top right-hand corner of the screen as shown below. If there are any pending results, a number will appear in the top right corner of the **'Results' tab**, indicating how many results are awaiting review.



b. The list of available results will appear on the right-hand side. All results that exactly match critical patient data (patient name and date of birth) in the patient chart will be automatically resulted and added to the EHR. Any result that is automatically resulted will show in the completed section of the results tab.



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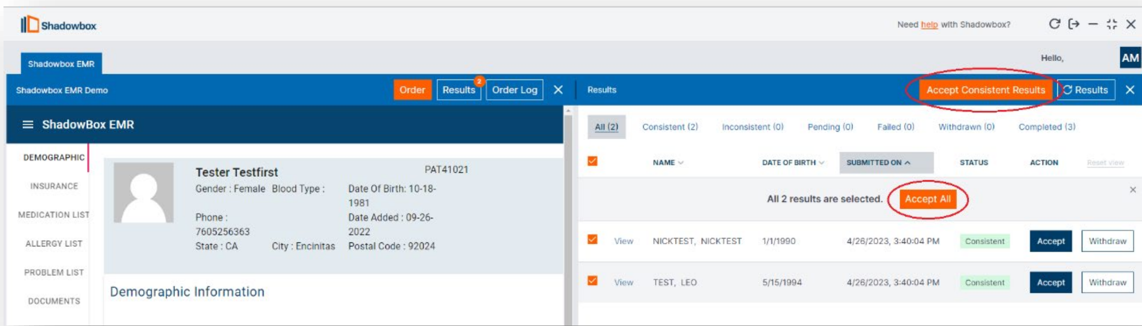
How to View Results Log

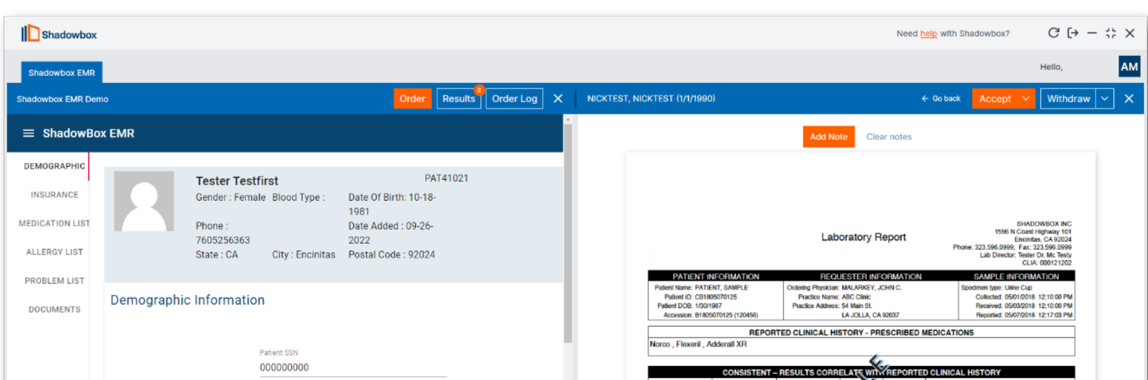
a. At the top of the Results Log you will see the **'Accept Consistent Results'** button. This will accept all consistent patient results that are pending approval. This is the quickest way to mass upload consistent test results into the EHR.

b. You can accept patient results, select the checkboxes next to the desired test results, then click **'Accept Results' or 'Accept All.'** That will allow you to upload multiple results at a time.

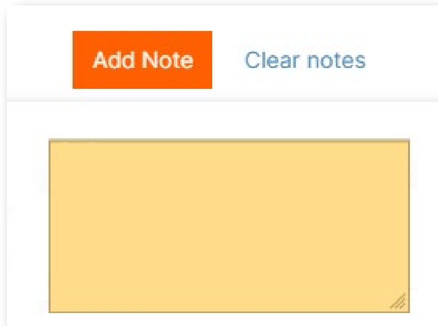


c. You can accept or withdraw a single result by clicking the **'Accept'** or **'Withdraw'** button next to the desired test result.

d. Last option to process results is to select **'View'** button next to the desired test result. You will be able to view the desired test result and then select **'Accept'** or **'Withdraw'** in the top right-hand corner.

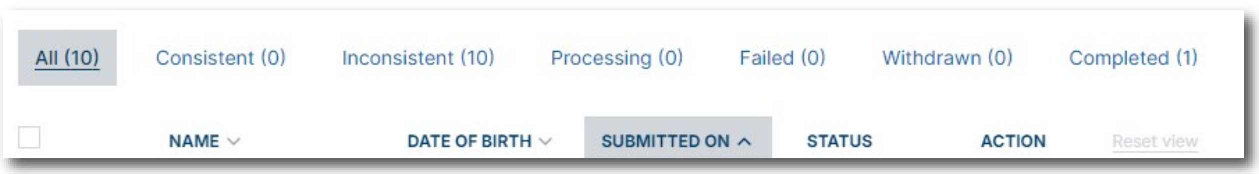


e. You can add notations to the results using the **'Add Note'** feature. However, please note that the note cannot cover any critical information on the patient's result, and it cannot be moved once the result has been accepted into the patient's chart.



f. Once the result has been accepted into the patient's chart, you will receive a notification in the top right-hand corner of the screen.

g. Any result that does not exactly match the patient data will be listed in the **Results Log**, categorized as **consistent, inconsistent, pending, or failed** at the top of the Results Log.



i. **Consistent results** are determined as "consistent" by your associated ancillary care facility's parameters.

ii. **Inconsistent results** are determined as "inconsistent" by your associated ancillary care facility's parameters**.**

iii. **Pending results** may include those still being processed after you select **'Accept Consistent Results' or 'Accept Results.'**

iv. **Failed results** indicate a mismatch between the test result and patient data (i.e. patient name, date of birth, etc.). These results must be reuploaded, which can be done within the **Results Log**.

v. **Withdrawn results** include any results that have been omitted or withdrawn.

vi. **Completed results** include any results that have been successfully accepted or completed.

h. You will have the ability to filter the results by name, date of birth, date of generation of the result.

i. Once a result is accepted either manually or automatically you can go to the EHR to review the accepted test result.

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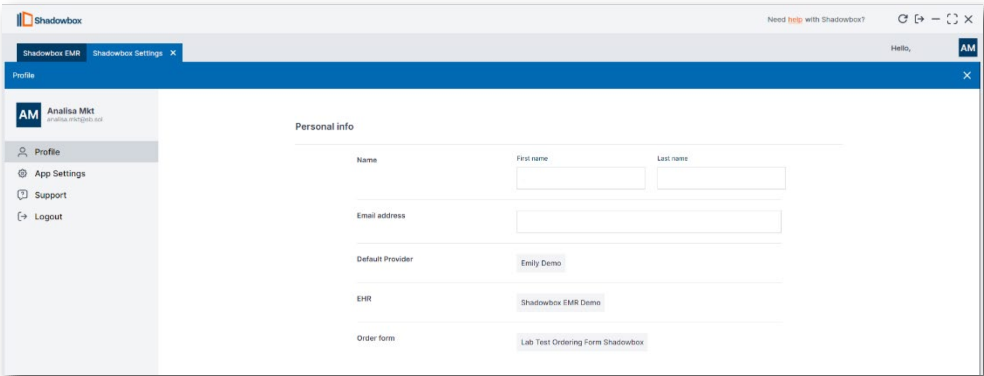
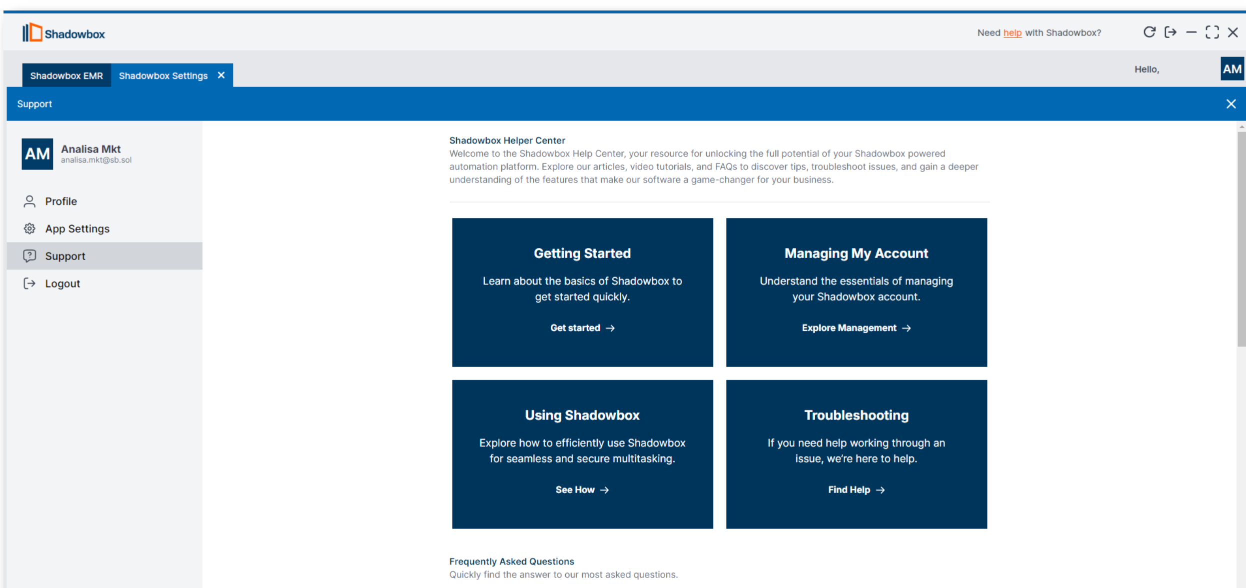
How to View User Profile Settings

a. You can view your user profile settings within the application by clicking your username at the top right-hand corner of the screen. You can see information like your email address, default provider, and EHR information and credentials.



b. You can also access support functionality like user FAQ and application version.



If you have any questions, comments, or concerns, please reach out to us with your name and location. We are happy to assist you at SUPPORT@SHADOWBOX.COM