

Instructions for SARS-CoV-2 Specimen Submission Form Batch Upload

Background:

The Ohio Department of Health (ODH) created a universal specimen submission form, which can be accessed through an authenticated portal or through a web link. Information entered in this system is used to populate a .pdf form, which can be printed and sent along with the specimen. Additionally, if a user is accessing the authenticated portal, entered data is electronically transferred from that portal to the testing laboratory. To expedite data entry into this portal, ODH has added a batch upload function whereby users can collect all the patient data in a .csv file, upload that file into the system, and have the data electronically transferred to the lab as well as generate the PDFs needed to be sent along with each labeled specimen.

Important Items to Note:

- The file uploaded into the batch upload system needs to match the provided template and needs to be in .csv format. If you upload a .xls or .xlsx file, your file upload will fail.
- Do not try to upload more than 100 records at a time. Your upload will fail if there are too many records that are uploaded at one time.
- If there are any errors, you can find those in the Error Recs field on the upload files toolbar. You can see each error by clicking the arrow next to your file name in the upload files toolbar (please note that the file name in the upload files toolbar will not be the same as the name of the file you uploaded). A drop down will appear that lists the line number where the error is found and what is the error.

Filename	Upload Date	Lab	Expected...	Successf...	Error Recs	Download Path
2020-09-20_17-40-19-76995391.csv	09/20/2020	MetroHealth	106	9	97	Get Combined PDF

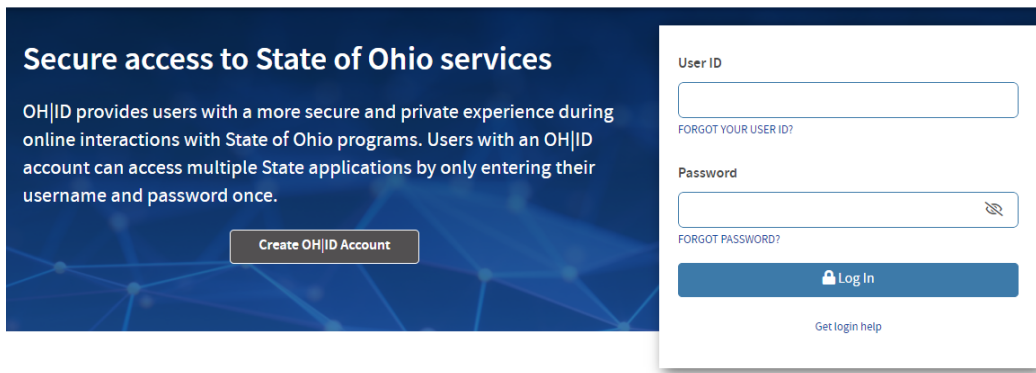
Line Number	Error Messages
4	[An error has occurred processing this record, please try again. If issue persists, contact odhlabportal@odh.ohio.gov]
6	[An error has occurred processing this record, please try again. If issue persists, contact odhlabportal@odh.ohio.gov]
8	[An error has occurred processing this record, please try again. If issue persists, contact odhlabportal@odh.ohio.gov]
9	[An error has occurred processing this record, please try again. If issue persists, contact odhlabportal@odh.ohio.gov]
15	[Onset Date cannot be in the future]
16	[Onset Date cannot be in the future]
17	[Onset Date cannot be in the future]
18	[Onset Date cannot be in the future]
19	[Onset Date cannot be in the future]
20	[Onset Date cannot be in the future]

- Please do not upload the same file multiple times as the duplicate records will be sent to the testing laboratory. Any time there is an error, please create a smaller data set with those error files, fix the errors, and re-upload that smaller (non-duplicated) file.

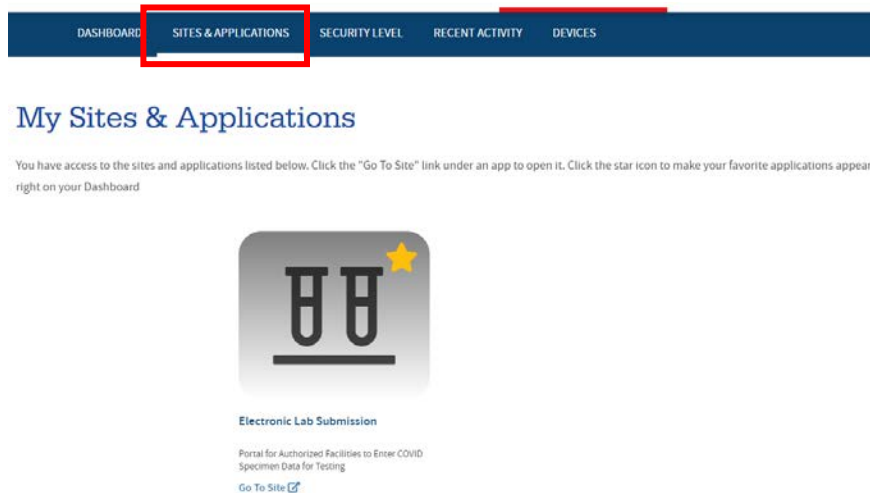
- A zipped folder of individual PDFs will download onto your computer. Please open the zipped folder and click on each PDF to print and send with specimen. PDFs can also be saved for later printing. If you are concerned about printing off each individual PDF as opposed to one large document containing all records, there are many features on PDF readers as well as software options that will allow you to merge multiple PDFs into one file.
- It can take time for the zipped folder of PDFs to generate. If you do not immediately see the Get Combined PDF link (if you see a processing note in the download path column), it is ok to leave site and log back in at a later time to see the generated folder of PDFs for printing.

Instructions for Use:

1. Log into the OH|ID portal (<https://ohid.ohio.gov/wps/portal/gov/ohid/>) using the username and password created when establishing your account.



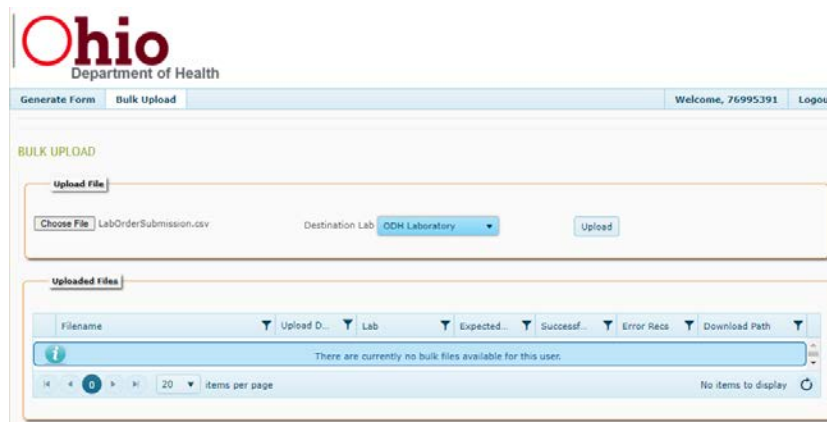
2. Navigate to Sites and Applications and click to launch the Electronic Lab Submission app.



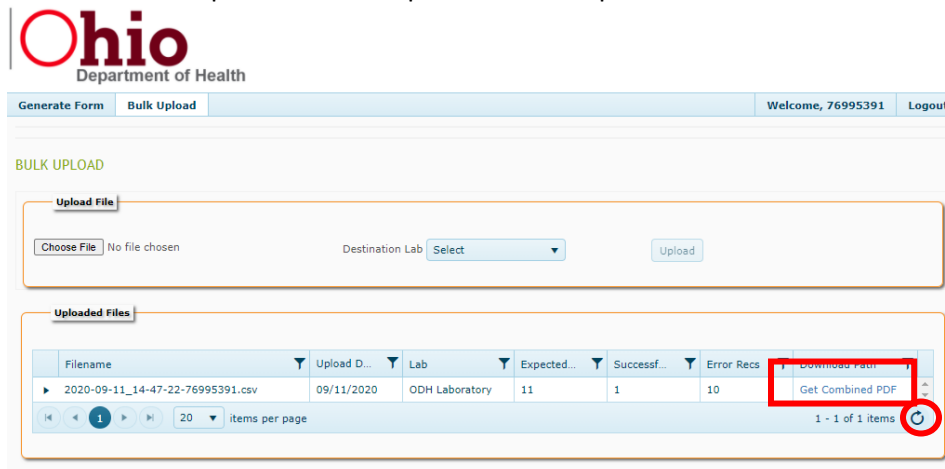
- In the specimen submission form portal, navigate to the Bulk Upload Tab on the top left-hand corner of the screen.



- Choose the file that you wish to upload by selecting the Choose File button. After file is chosen, choose the correct destination laboratory (where specimens are to be sent for testing) and click Upload. Please note that the file must be in the correct format (using the template as a .csv file (sheet 1) and instructions (sheet 2) provided) for upload to process. ****Make sure you copy the template into a new blank excel document and save as a .csv file.****



- Refresh the Uploaded Files section (using the button circled below) to see that file that has been uploaded into the lab submission portal. Click on the "Get Combined PDF" button to access the PDF that needs to be printed for transport with each specimen.



- a. A zipped folder of individual PDFs will download onto your computer. Please open the zipped folder and click on each PDF to print and send with specimen. PDFs can also be saved for later printing.

For Additional Technical Assistance:

For users needing further technical assistance, please contact <mailto:odhlabportal@odh.ohio.gov>.

FAQ's

- ***Are new lab requisition forms still required for each round of testing?***

Yes – please ensure those forms are accurate, complete, and are packaged with each specimen for transport to the appropriate testing laboratory.

- ***Am I required to use this batch upload system? I am comfortable with manually keying in records into the electronic lab submission form interface.***

You are not required to use the batch upload. This functionality was added to the electronic lab submission portal to reduce the amount of repetitive data entry necessary to create lab requisition forms.

- ***Do I need to renew my access to the portal before this bulk upload functionality becomes available?***

Once the bulk upload goes live, it will be added to your existing account. No need to do anything special with your account to access the bulk upload.

- ***What are the key fields that should be updated for each round of testing?***

The following are fields that need to be updated each time an individual is tested:

Column Name in CSV	Corresponding Field in Form
Collection_Date	Collection Date
Order_Date	Order Date
Symptomatic	Symptomatic
Symptom_Onset_Date	Onset Date
First_COVID_Test	First Test
Employed_Healthcare	Employed in Healthcare
Hospitalized	Hospitalized
ICU	ICU
Pregnant	Pregnant




Any other field on the form can be updated as well, though information in those fields is not expected to change between rounds of testing.

- **Are employee IDs required?**

No, you are not required to populate the patient ID field.

- **What specimen type should be selected?**

To specify specimen type, you need to list what the specimen is and what the specimen is not in the template document. So if you are collecting a nasopharyngeal specimen, that is the specimen collected with a swab that has a long, flexible shaft and is collected from the area under the base of the skull, you will need to denote that the specimen is an NP swab and is not an OP swab and is not an other swab. In contrast, if you are collecting a nasal specimen, that is a specimen collected by rotating q-tip like swab for 10-15 seconds within both nostrils, you need to denote that the specimen is not an NP swab, is not an OP swab, and is an other swab, specifically an AN swab or a Nasal swab.

Collection Depiction	Specimen Type	Notation on Batch Upload Template
	Nasopharyngeal	Specimen_Type_NP_Swab = "Yes" Specimen_Type_OP_Swab = "No" Specimen_Type_Other = "No" Specimen_Type_Other_Specify = [leave blank]
	Oropharyngeal	Specimen_Type_NP_Swab = "No" Specimen_Type_OP_Swab = "Yes" Specimen_Type_Other = "No" Specimen_Type_Other_Specify = [leave blank]
	Anterior Nares or Nasal	Specimen_Type_NP_Swab = "No" Specimen_Type_OP_Swab = "No" Specimen_Type_Other = "Yes" Specimen_Type_Other_Specify = "AN" or "Nasal"

- **Insurance companies provide varying levels of information on the customer cards. How should I populate insurance fields if for example, insurance companies do not list billing/claims addresses on their cards or if a patient has Care Source or Medicare A, which don't have Group ID numbers?**

If the patient is insured, the insurance fields on the form are required. Please enter as much information about a particular plan as possible. If insured are on Care Source or Medicare A, Group ID can be populated with 0000000. Please make note in the comments box that no Group ID is available. If insurance card does not list billing/claims address, please populate those fields with NAs. Please make note in the comments box that no billing/claims information is available.

- **There are many options for saving as a .csv file in excel. Which option should I use?**

Please use the .csv (comma-delimited) option.

- ***Do I need to avoid changing the width of columns for my file to upload?***

The two requirements for a file to upload are .csv format and use of the template document (so all appropriate headers are present and the data within those columns is correctly formatted). The nature of a .csv file is that the data will always look compressed when the document is opened in excel (e.g., you'll see ##### instead of dates appear when you open the file) – this is ok. Any formatting modifications to the file will be correctly saved when saving as a .csv.

If you are ever concerned about the formatting of your file, please open file as a text file and visualize your data. You should see each record as its own row, with all data elements separated with commas.

- ***My file is not processing in the bulk upload system. What is wrong?***

Please check to make sure that you are uploading only a .csv file and that the uploaded file is in the correct format (as denoted in the template as a .csv file (sheet 1) and instructions (sheet 2) provided). If the error persists (and there is no error message), please contact odhlabportal@odh.ohio.gov for further guidance.

- ***There are PDF's missing from the list of clients I uploaded.***

You should be able to see the number of "Expected" and "Successful" and "Error Recs" on the line containing your generated file. If you click on the small arrow next to your filename, you should be able to see a listing of all the failed records along with an error message giving a brief explanation of why the record failed. Remember: The file headers are Line 1, so Client Record 1 = Line 2, Client Record 2 = Line 3, and so on.

Once, you've made corrections to the failed records, make sure to only reupload those records that failed the first time in order to avoid creating multiple duplicate records.

If no errors appear in drop down list, please try re-uploading the file after several minutes have passed. Contact odhlabportal@odh.ohio.gov if issue persists.

- ***Can I print the PDFs in bulk or do they need to be printed individually?***

A zipped folder of individual PDFs will download onto your computer when the Generate PDF button is clicked. Please open the zipped folder and click on each PDF to print and send with specimen. PDFs can also be saved for later printing. If you are concerned about printing off each individual PDF as opposed to one large document containing all records, there are many features on PDF readers as well as software options that will allow you to merge multiple PDFs into one file.