Client ITSA Portal Instructions

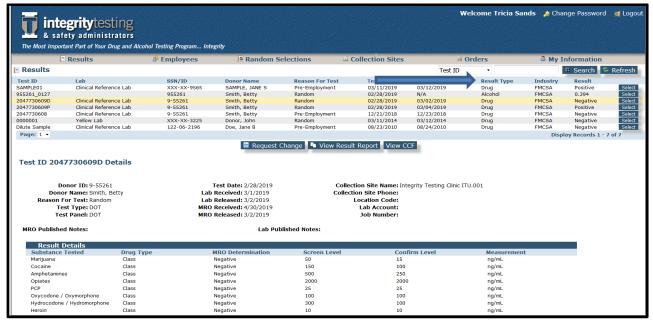
ITSA will create a username and temporary password to allow a DER access to the ITSA Web portal to view and reprint MRO Result letters, locate in-network clinics, and perform roster maintenance.

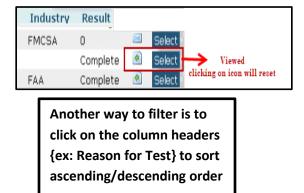
The link to the portal is: https://portal.itsacorp.com/

The DER will be prompted to change their password the first time logging into the portal.



The result tab is searchable using any of the columns listed. In the first field, choose the criteria you want to search (drop down box has several options). In the second box, type in the criteria (i.e. Employee name, Specimen ID), select search button. All results matching criteria will show. To view a specific result, click the select button next to that record. Each result record has an envelope next to it to show when it has been viewed.





To view actual Result Report, choose the "View Result Report" Button. To request a change to the record, select the "Request Change" button and indicate in the pop-up box what change is needed to the report and choose the submit button. For a copy of the CCF select "View CCF" button. If a Memo for Record(MFR) is associated with a CCF/ATF, there will be a MFR button to choose to access the MFR.

Adding a Pre-Employment Test Result as New Employee OR Adding a Return-To-Duty Negative Result:

Choose the Select button.

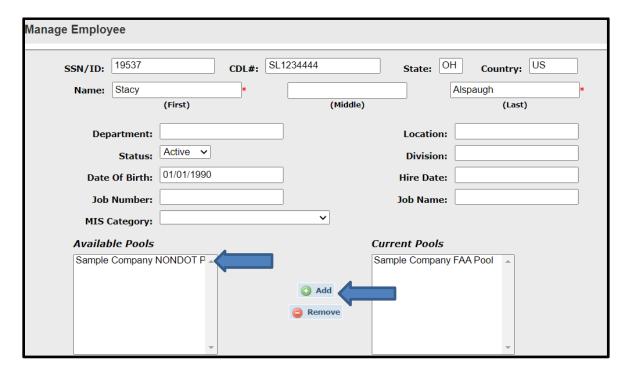




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Client Help – ITSA Portal Process

If there is any information you want to add, i.e. MIS Category, Department, Location, go ahead and add that information. Then highlight the "Available Pools" and choose "Add".



Any open fields can be edited.

Best Practice: Update SSN/Employee ID so it's consistent with the current roster.

- *FMCSA employers should now be using CDL# as the employee ID per current DOT regulations.
- FMCSA Employers/Customer: Update the driver's CDL number, state of issuance, DOB and country for each employee.

The box below will appear and the employee is now active in your roster.



FMCSA clients: New drivers are automatically added to active roster

once pre-employment test is cleared—during roster review make

*The auto-add feature is available to other clients also; Notify ITSA

team member if you want this feature activated on account

sure your roster is using the CDL# of the driver

IMPORTING A ROSTER INTO THE ITSA PORTAL

Another feature is using the ITSA Import Roster feature by using the Excel template ITSA provides to you. (You may export your roster to see the template)

When adding employees to your roster make sure a negative Pre-Employment test result or negative Return-to-Duty test result are on file and

for pre-employment tests, that the test is within the guidelines of the DOT agency regulations your company is required to follow as listed below:

FMCSA: 30 day window

PHMSA: nothing in regulations, however industry auditors state 30 days like FMCSA

FAA: 180 day window

FTA: 90 day window

USCG: 60 days with proof of a negative test if from a previous employer (see regulations for additional guidance)

FRA: 1 pre-employment test for life with the company (can add employee back to roster without a new pre-employment test)

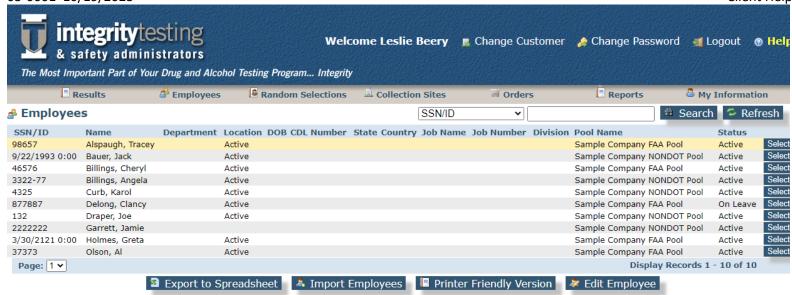
Note: Only the ITSA template provided to you will be able to be loaded. All column titles listed below need to be at the top of the spreadsheet for the import to properly load, however all the fields do not require data in the columns.

Customer_ID Pool_ID SSN/ID First_Name Middle_Initial Last_Name Department Location Date_Of_Birth CDL_Num CDL_State CDL_Country Job_Name Job_Number Division Status

LOADING WITH MULTIPLE ROSTERS:

Combine all rosters for your customer number into one spreadsheet. One spreadsheet can contain multiple pools, No duplicate SSN/ID#'s, if you have an employee that is in both pools, please add a extra character or number to the employee ID to differentiate between the two and allow them to have separate records for reporting purposes.

When uploading an employee roster, the upload replaces the entire previous roster, anyone not on the new uploaded roster will be inactivated...



Best practices are to export a copy of your roster before you do any importing. This gives you a copy to revert back to if needed.

Click on Export to Spreadsheet. This will download a copy of your current roster to your computer. You may edit the file or keep as a backup in case you need to revert back for any reason.

Best practices when editing your roster:

- 1. Your export of the roster will download as a .csv file. Please edit and save as an .xls format (Microsoft Excel). If you need assistance on how to save a spreadsheet from another program as an Excel file, please contact ITSA IT (586-991-0000 Option 5)
- 2. Remember that the employees on your list that you upload will overwrite the entire roster that was in the portal. The employees that you will not see any longer are not deleted, they have been inactivated.
- 3. Use Middle Initials as an additional verification for employee identity. This is required when you have multiple employees with the same first and last name. If you have employees that have the same first, middle and last name please contact ITSA IT for assistance. (586-991-0000 Option 5)
- 4. Do not add spaces to columns. Please have the columns left justified as in the export when you do your import back into the portal.
- 5. Do not change names of columns.
- Do not add columns that were not part of the export.
- 7. Customer number and pool numbers are the identification that is required for our system. Please do not change or delete these numbers.
- 8. One spreadsheet can contain multiple pools, No duplicate SSN/ID#'s, if you have an employee that is in both pools, please add a extra character or number to the employee ID to differentiate between the two and allow them to have separate records for reporting purposes.

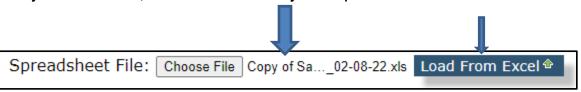
When you have a copy of the employee roster that is ready for uploading, select Import Employees.



Choose File. Find the file to want to upload in your computer.



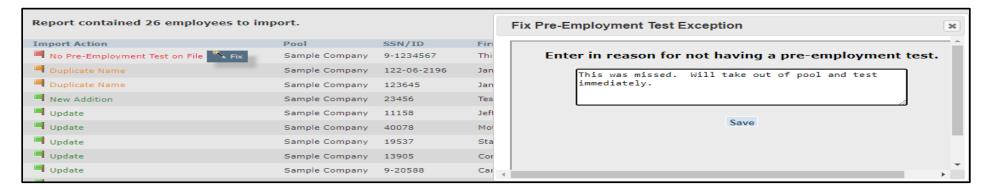
Once you choose the file, the name of the file from your computer will show. Then choose "Load From Excel"



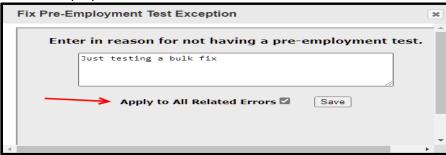
If importing employees with no pre-employment test on file, an error message in red will display. You are required to put an explanation as to why the employee is being added with no test on file with ITSA. The reason could be a test was performed on a different laboratory account by error. This is a common error. You should have a copy of result that can be shown in the event of an audit. You have to explain your program to an auditor.



Choose the "Fix button" and document the reason for the addition This is for audit purposes. Then choose the "Save" Button.



Additionally you can apply the same reason for all results that show a pre-employment test exception for the purpose of not having to do these individually. See excerpt below:



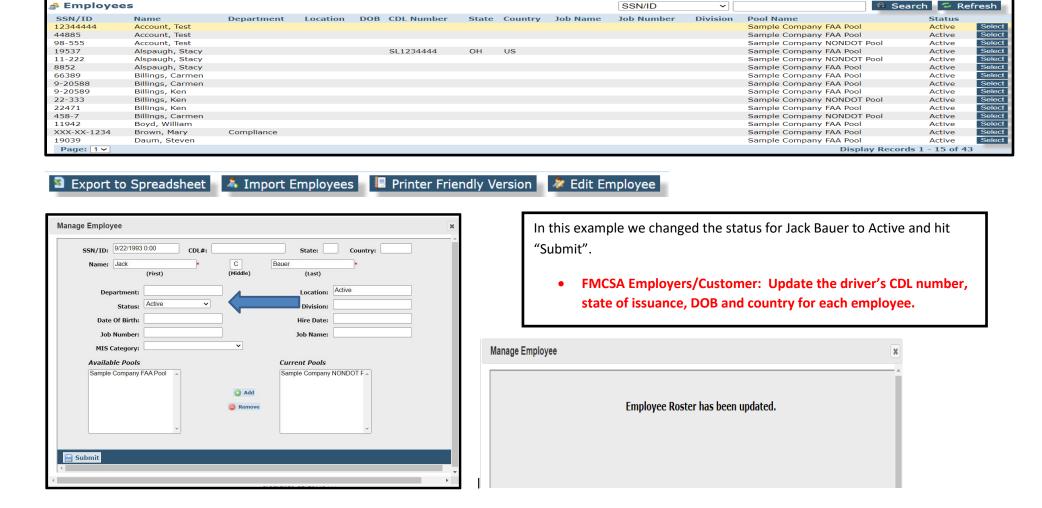
In the example below with a duplicate warning, the employee will import. This is a notification in the event the employee is indeed the same person. If that is the case, inactivate the employee from the roster after you completed the import. To complete the import, click on the Import button.



The screen shot below shows you the number of employee records that were imported. If you receive an error or you do not get this message, please contact an ITSA team member to help resolve the issue. Please create a "snip-it" or "screen shot" of the error to be sent to mailto:clientservices@integritytesting.net for an ITSA team member to resolve.



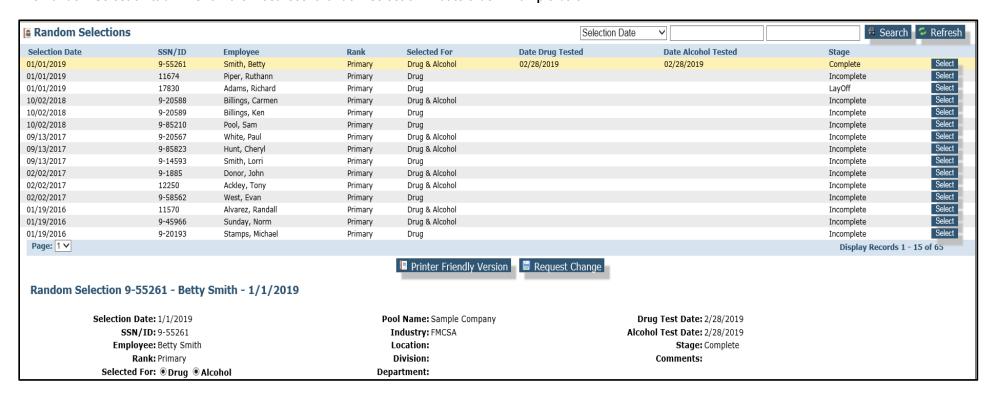
The Employee Tab screen defaults to all employees with an "Active" status in company roster. From this screen you can search by SSN/ID, Name, Job Name, Location, Status, and Pool Name. Manage employees by adding additional information such as specific job name or change the employees status to "Inactive". To update a specific employee record, choose the select button next to the employee you wish to udpate and then choose "Edit Employee".



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The Random Selection tab will show the most recent random selection in date order. Example below:

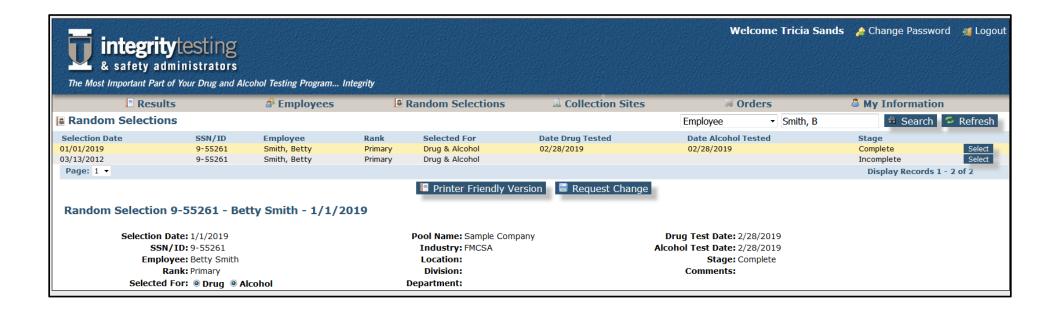


If searching for a specific random selection, enter the date the random was processed in both boxes to the right of "Selection Date".

Random Selection	ns				Selection Date	∨ 07/08/2009 07/08.	/2009	Refresh
Selection Date	SSN/ID	Employee	Rank	Selected For	Date Drug Tested	Date Alcohol Tested	Stage	
07/08/2009	155-31-1330	Khambati, Shabbir	Primary	Drug			Incomplete	Select
07/08/2009	322-48-6694	Baggot, Russell	Primary	Drug & Alcohol			Incomplete	Select
07/08/2009	138-65-7894	Kantor, Robert	Primary	Drug			Incomplete	Select
07/08/2009	164-77-9562	Pryce, Lynnette	Primary	Alcohol			Incomplete	Select
07/08/2009	594-82-6348	Robert, Jerome	Primary	Drug			Incomplete	Select
07/08/2009	9-14593	Lorri, Smith	Primary	Alcohol			Incomplete	Select

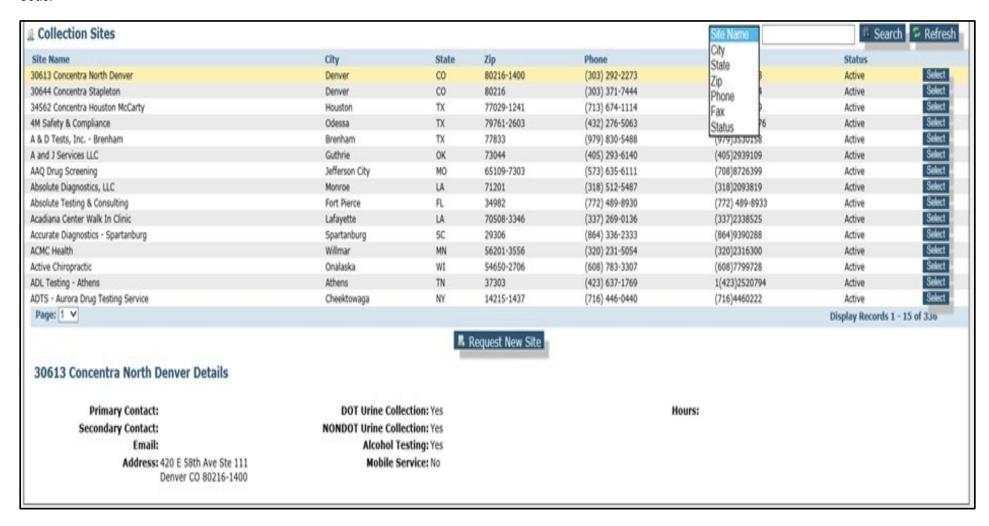
When looking for a specific person because you want to see how many times they have been selected for random selections choose the drop down button and choose "Employee".

It is best to put the full name of the employee with the last name first, a comma and then their first name. This will bring all selections for the person with that name.

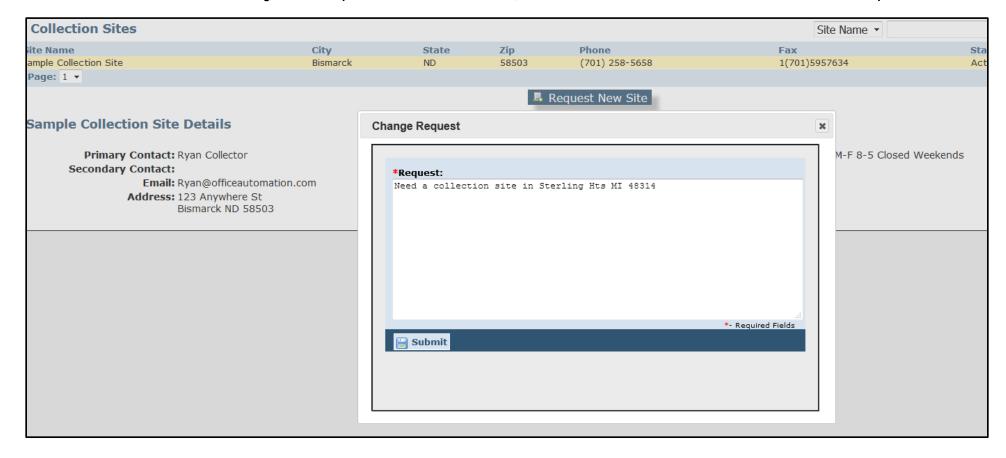


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The Collection Site tab will bring up all collection sites that have been assigned to your account. If you have many sites you use, you can filter by City, State, or Zip Code.

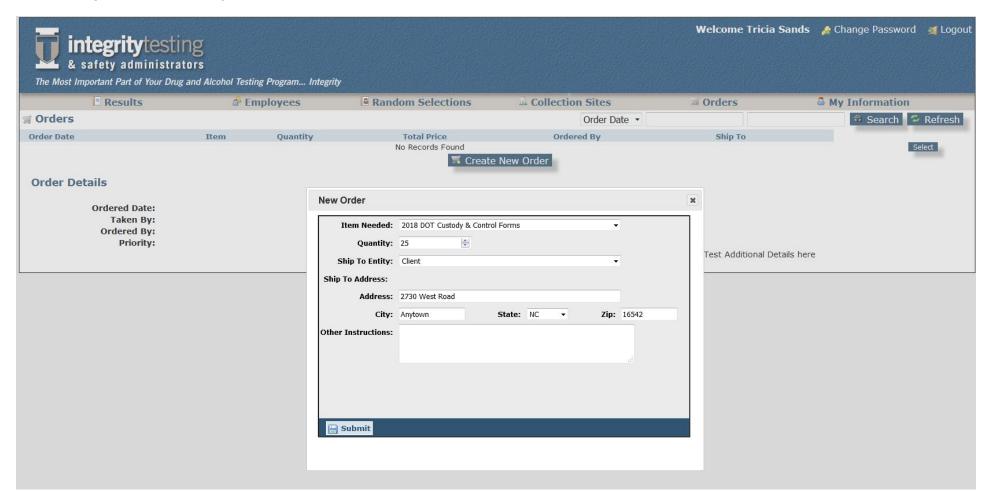


To request a new collection site not already established for your account, select the Request New Site button. Enter the City, State or Zip Code along with any other detail and select submit button. This will generate a request to an ITSA team member, who will research and locate a collection site closest to the requested area.





To place an order for CCFs, ATFs or other supplies, select the Create New Order button. A pop-up box will appear with drop down menu items. Complete the order requests then click submit. This will generate a request to an ITSA team member, who will place the order for the requested item(s). Please note CCFs/ATFs orders take an average of 7-10 business days to receive.



Reporting in the ITSA Portal

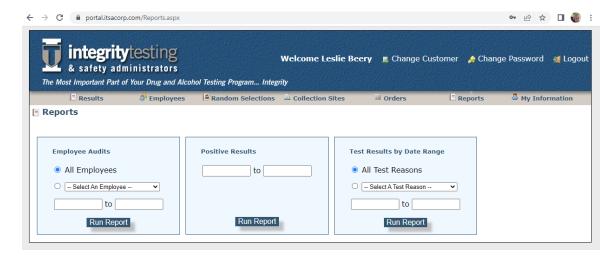


Figure 1 – Reporting Screen in the ITSA Portal

Within the ITSA Portal you have the following reports available to you:

Employee Audits Report

This report will show changes to an employee in the portal through audit notes in the report. This report will also show current status.

Select your reporting parameters:

- All Employees by date range
- Specific Employee by date range

Select which report you would like and select your date range. Click on Run Report

Quick Tip* - To capture all employees in this report use a starting date range that will include all work you have completed in the portal.

to see the report on the

Print

integr & safety	itytesting administrators		The Most Important Part of Your Drug and Alcohol Testing Program Integrity		
Last Name	First Name	Current Status	Entered By	Date Entered	Audit Notes
Account	Test	On Leave	Mary Brown	4/28/2022	Status changed to On-Leave on 1/26/2023 4:22:06 PM Status changed to On Leave on 1/26/23 4:22 PM
Account	Test	Active	Kelly Markus	5/4/2022	Cratas shanges to on Esare on NESIES NEET III
Alspaugh	Stacy	Active	Kelly Markus	5/4/2022	
Alspaugh	Stacy	Active	Mary Brown	4/28/2022	
Alspaugh	Stacy	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM -
Billinas	Carmen	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM -
Billings	Carmen	Active	Kelly Markus	5/4/2022	
Billings	Carmen	Active	Mary Brown	4/28/2022	
Billings	Ken	Active	Mary Brown	4/28/2022	
Billings	Ken	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM -
Billings	Ken	Active	Kelly Markus	5/4/2022	-
Boyd	William	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM - Fixed
Brown	Mary	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM - Fixed
Daum	Steven	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM - Fixed
)oe	JaneB	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM -
)oe	JaneB	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM -
merson	Betty	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM - Fixed
ield	Lilly	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM -
Flower	Marigold	Inactive	Web: TLPryce (51)	8/16/2022	Status changed to Inactive on 8/16/2022 10.52:37 AM Status changed to Active on 11/29/2022 7:12:02 PM Status changed to Inactive on 11/29/2022 7:12:19 PM
Henry	William	Active	Mary Brown	4/27/2022	Status changed to Active on 4/28/2022 4:49:03 PM - Fixed

Figure 2- Employee Audits Report results screen

Positive Results Report

This report will show the positive tests, by employee, for a specific date range.

Quick Tip* - Use this report to gather positive test data for MIS reporting!

Select your reporting parameters:

Date Range

Results will show on the screen or may be printed with the print button in the upper right corner.

Function: IT Task: ITSA Portal Author: ITSA Staff

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Figure 3 - Positive Results Report Screen

Test Results by Date Range

This report will show all employee test results (all test reasons or a selected reason only) for the company, sorted by test number and test date. The report shows SSN/ID, employee name, reason for test, test date, MRO released date, type of test, test panel, industry and the test result.

Select your reporting parameters:

- All Test Reasons
- Specific Test Reasons (see option list below)
- Date Range of data for report

Quick Tip* - Use this report to capture all test reasons for a date range (quarterly) to keep up on reporting requirements.

Test Reasons you may select:

Function: IT Task: ITSA Portal Author: ITSA Staff

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Annual	Baseline	Exit	
Fit for Duty	Follow-UP	Other	
Periodic	Post-Injury	Post-Accident	
Pre-assignment	Pre-Employment	Random	
Reasonable Cause	Reasonable Suspicion	Recertification	
Re-Evaluation	Return to Work	Return to Duty	
Shy Bladder Exam			



Figure 4- Test Results by Date Range Report

This report must be downloaded and not printed. Click on download at the upper right corner of the screen. This will download a .csv format file to your computer. Open the file with Microsoft Excel, Google Sheets or any other spreadsheet program that will read .csv formatting.

Select "Save As" in your program to save the file in your spreadsheet program's format.