

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...	Success...	Error Recs	Download Path
2020-09-20_17-40-19-76995391.csv	09/20/2020	MetroHealth	106	9	97	Get Combined PDF

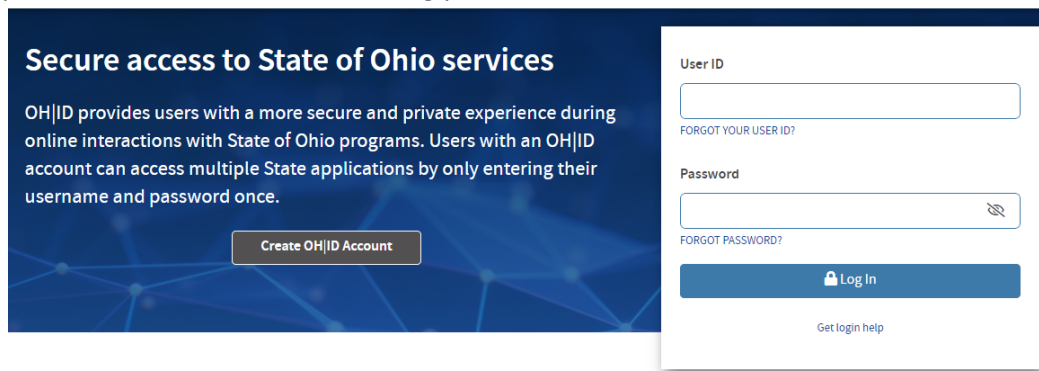
Line Number	Error Messages
4	[An error has occurred processing this record, please try again. If issue persists, contact odhlaboratory@odh.ohio.gov]
6	[An error has occurred processing this record, please try again. If issue persists, contact odhlaboratory@odh.ohio.gov]
8	[An error has occurred processing this record, please try again. If issue persists, contact odhlaboratory@odh.ohio.gov]
9	[An error has occurred processing this record, please try again. If issue persists, contact odhlaboratory@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.

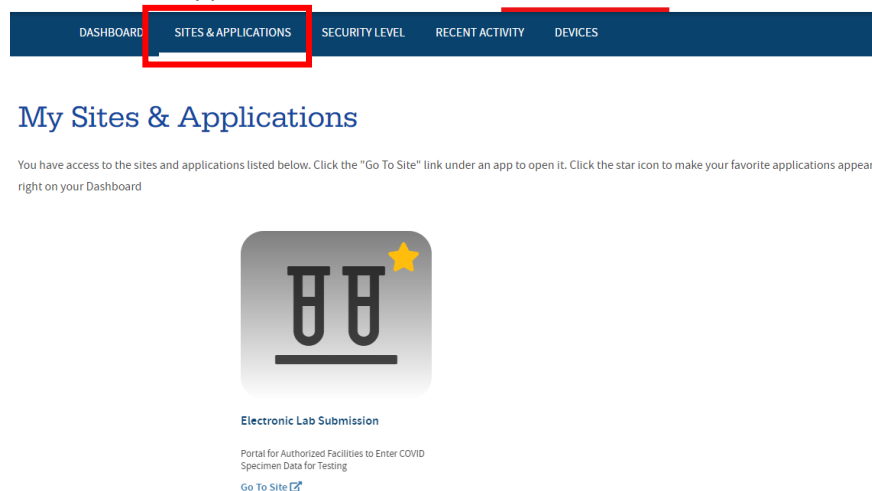
- A zipped folder of individual PDFs will download onto your computer. Please open the zipped folder and click on each PDF to print and send with specimen. PDFs can also be saved for later printing. If you are concerned about printing off each individual PDF as opposed to one large document containing 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.



My Sites & Applications

You have access to the sites and applications listed below. Click the "Go To Site" link under an app to open it. Click the star icon to make your favorite applications appear right on your Dashboard

Electronic Lab Submission

Portal for Authorized Facilities to Enter COVID Specimen Data for Testing

[Go To Site](#)

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

The screenshot shows the 'Bulk Upload' tab selected in the top navigation bar. The page title is 'SARS-CoV-2 Specimen Submission Form'. Below the title, there is a message: 'Complete fields and click **GENERATE PDF** at the bottom of the page to create a PDF to submit with specimen.' A 'Generate Form' button is visible on the left, and a 'Bulk Upload' button is highlighted with a red box. The user is logged in as 'Welcome, 76995391' with a 'Logout' link.

4. 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.****

The screenshot shows the 'BULK UPLOAD' section. Under the 'Upload File' tab, the 'Choose File' button has been clicked, and the file 'LabOrderSubmission.csv' is now selected. The 'Destination Lab' dropdown menu is set to 'ODH Laboratory'. An 'Upload' button is visible. Below this, the 'Uploaded Files' section shows a table with columns: Filename, Upload D..., Lab, Expected..., Successf..., Error Recs, and Download Path. The table is currently empty, displaying the message 'There are currently no bulk files available for this user.'

5. 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.

The screenshot shows the 'BULK UPLOAD' section after a file has been uploaded. The 'Choose File' button now says 'No file chosen'. The 'Destination Lab' dropdown menu is set to 'Select'. The 'Uploaded Files' section now displays a table with one row of data:

Filename	Upload D...	Lab	Expected...	Successf...	Error Recs	Download Path
2020-09-11_14-47-22-76995391.csv	09/11/2020	ODH Laboratory	11	1	10	Get Combined PDF

The 'Get Combined PDF' button is highlighted with a red box. A refresh button (circular arrow icon) is circled in red at the bottom right of the table. The page indicates '1 - 1 of 1 items'.

- 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

- ***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.

- ***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.