

Client Portal: COFL quick guide

Getting Results:

1. As soon as you have logged in, you will find yourself in the Submissions Page. You can use the filter options at the top as needed.
2. "Started" tab shows you all of the submissions which you have started but which have not been completed and submitted
3. "Submitted" tab shows you all submitted requests and their status.
 - "Dispatched" indicates we received the information but have not yet received samples
 - "Received" indicates we have the samples and are preparing to test
 - "In Progress" indicates we are working on the testing.
 - If you click on the reference number, you can review the testing status.
 - If some tests have been completed, preview of results is generally available here
4. "Lab Complete" tab shows finalized testing. Click on the "Latest Report" for a PDF copy. Clicking on the reference number allows a more detailed view for larger submissions.

Submitting Samples:

We have prepared 2 videos (found below) which are designed to walk you through both a manual submissions process as well as a bulk entry process.

Manual:

1. Click the blue "New" button at the top of the page
2. Select the lab you will be sending samples to (Barron or Madison). The remaining fields on this page are optional.
 - Important: If you are submitting a necropsy, we require an attached signed submission form. Use upload attachments at this stage.
3. In the Veterinarian/Owner sections, the Attention Veterinarian and Owner Fields must be complete. The remaining fields on this page are optional.
4. The Additional Data fields are all optional.
5. In Setup:
 - Determine if this is an animal specimen or non-animal and make the appropriate selection
 - If you will use the bulk upload template, check that box and see Bulk submission information below.
 - Determine the number of individual animals (or distinct non-animals) and enter that here.
 - The Increment ID is an arbitrary number for specimen identification in the laboratory. If you enter a zero, your animals will be sequentially numbered starting with "1".
 - Taxon information is required to proceed.

- We use the scientific terminology; for instance a search for "bovidae" rather than "cow" will be successful.
 - "NFS" simply means "Not further specified" and may be useful if specific information is not known or required.
- The remaining required information regards the specimen:
 - Indicate the number specimens for each animal.
 - Specimen type is what you are sending, such as whole blood or an ear notch. Start typing and the option you need should come up.
 - If you are submitting a necropsy, please type in "animal"
 - The specimen type description hones in on the details based on the specimen type entry.
 - Transport Medium is a required field, but we accept "None"
 - Collection Date is a required field.
 - We recommend ignoring the incremental Specimen Name field.
- 6. On the Animals and Specimens screens that are the consecutive next steps, you may make corrections to all (at the top) or individually in the list.
- 7. In Tests, type at least 3 letters of the to retrieve tests that are appropriate for the taxon and specimens submitted.
 - Click "add test" as needed to add to the submission.
 - For each test, indicate the specimens you would like used for the test. You can select all specimens, all specimens of a single type (ie all Whole Blood), or specific specimens for specific animals.
 - If you would like samples pooled for testing there are options in added tests- please use the free text space to indicate pooling along with the test needed.
- 8. In review, please review the entire submission
- 9. The User Agreement is required and serves as your signature.
- 10. Please print the first page of your submission to serve as a packing slip. If you do not have a printer, please include the reference number (in green at top of page) and your contact information in the package.

Bulk Submission Template

1. Proceed as above, but at Step 5, click on the box "I want to add animals and specimens using the upload template"
2. If this is your first use of the template in the COFL portal, be sure to download the excel template (yellow box).
3. A completed file may be uploaded at this stage by clicking "Choose File" and open. Click "Next"
4. Review the warnings, however blanks for age, weight, # of specimens, specimen name, specimen type description, and tests are acceptable. Click "Next"
5. Continue with Step 6 above.