

ApvCalcSheet Operational Instructions

Table of Contents

Overview	2
Operation	2
Log In	2
CalcSheet Usage	2
Fields	2
Buttons	2
CalcSeet Details	8
xLab Starter	9
HL-7 Results, HL-7 Orders, HL-7 Charges.....	9
HL-7 DOH Results.....	9
HL-7 Outbound Orders, H-7 Inbound Results	9
Remote xLab.....	9
Certificates	9
1 Year Standard Hosting & Certificate	9
1 Year Standard Certificate Only	10
Premium 5 Year Hosting & Certificate.....	10
Premium 5 Year Certificate Only	10

ApvCalcSheet Operational Instructions

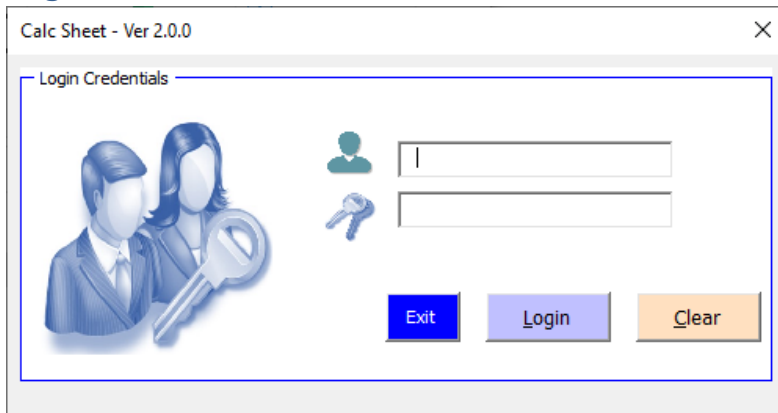
Overview

The ApvCalcSheet has been designed to limit possible errors where possible. You must have Excel installed on your computer to run the ApvCalcSheet.

Operation

When you open the ApvCalcSheet, you will be prompted to enter a User Name and Password. (Your specific User Name and Password were sent to you via a Text Message

Log In



Enter the User Name and Password you were provided and Click on Login. Clear just clears the User Name and Password fields. Exit just exits the ApvCalcSheet

CalcSheet Usage

In general, the usage of the CalcSheet to configure what is being purchased and the quantity are much the same as you have been doing all along. There are Buttons and two Fields that require special attention:

Fields

You must select a Sales Rep and a Type of sale.

Calculation Sheet - Release Date 08/30/2021	
Select Sales Rep	Select
Select type of sale	Select

Click on the field then the Drop-Down Icon and select as needed

Buttons

The three buttons are:

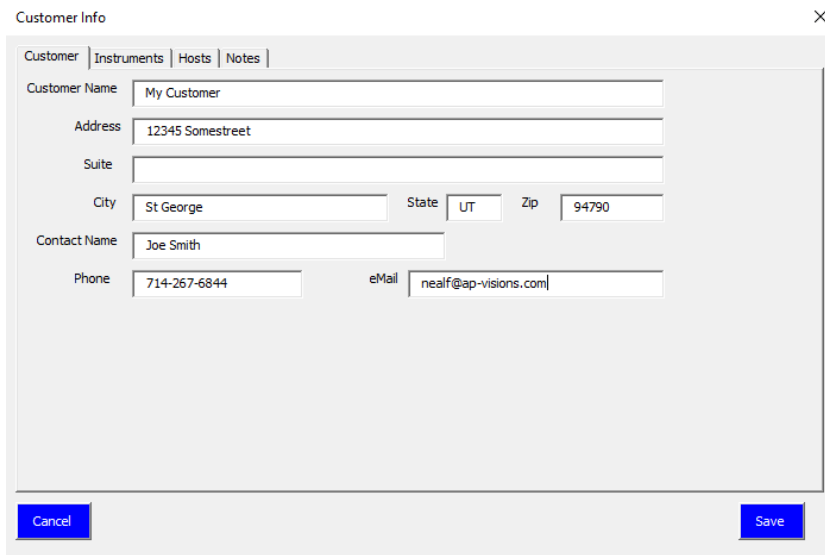
Customer Info		Save			Close with out Saving
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ApvCalcSheet Operational Instructions

CustomerInfo

You will notice that the section of the old Calcsheet to enter customer information is no longer there. The Customer Info Button will open a Form where this information is now entered. This Form contains 4 tabs: Customer, Instruments, Hosts, and Notes. Each Tab is covered in detail below. Initially, unless you are opening a ApvCalcSheet, the Customer Info form will be empty. If you are opening a previously saved ApvCalcSheet, the Customer Info form will be populated with data you previously entered.

Customer:



The screenshot shows a window titled "Customer Info" with a close button (X) in the top right corner. The window has four tabs: "Customer", "Instruments", "Hosts", and "Notes". The "Customer" tab is selected. The form contains the following fields:

Customer Name	My Customer		
Address	12345 Somestreet		
Suite			
City	St George	State	UT
Zip	94790		
Contact Name	Joe Smith		
Phone	714-267-6844	eMail	nealf@ap-visions.com

At the bottom of the window, there are two buttons: "Cancel" on the left and "Save" on the right.

A minimum of a Customer Name must be entered to save the ApvCalcSheet.

ApvCalcSheet Operational Instructions

Instruments:

Currently instruments are not required BUT you should always enter instruments.

Customer Info

Customer Instruments Hosts Notes

Quantity	Description
----------	-------------

Add Remove

Cancel Save

Follow the Steps below to enter Instruments.

1. Click on the "Add" Button to add a New Row
2. Click in the Quantity Field and enter the Quantity
3. Click in the Description and enter the Instruments Description (be as complete as possible)
4. Repeat Steps 1 thru 3 for each instrument
5. You may remove an instrument by clicking inside the row then click on Remove

Customer Info

Customer Instruments Hosts Notes

Quantity	Description
2	Beckmen U480
1	Tosho AIA-2000
1	Sysmex XN-2000

Add Remove

Cancel Save

ApvCalcSheet Operational Instructions

Hosts:

You only need to enter data for hosts you need. As an Example

Customer Info ×

Customer | Instruments | **Hosts** | Notes

Hosts	Quantity	Host Vendor
HL7 Results	<input type="text" value="1"/>	<input type="text" value="eClinical Works"/>
HL7 Orders	<input type="text" value="1"/>	<input type="text" value="eClinical Works"/>
HL7 Charges	<input type="text" value="1"/>	<input type="text" value="GE Charges"/>
HL7 ADT	<input type="text"/>	<input type="text"/>
DOH Results	<input type="text" value="2"/>	<input type="text" value="Texas and Alabama"/>
Outbound Orders	<input type="text"/>	<input type="text"/>
Inbound Results	<input type="text"/>	<input type="text"/>
Reference Lab	<input type="text"/>	<input type="text"/>

ApvCalcSheet Operational Instructions

Notes:

The Notes tab of for any special notes and conditions.

The screenshot shows a 'Customer Info' dialog box with a close button (X) in the top right corner. Below the title bar is a tabbed interface with four tabs: 'Customer', 'Instruments', 'Hosts', and 'Notes'. The 'Notes' tab is currently selected. The main area of the dialog is a text box titled 'Special Notes for this Calc Sheet'. It contains the text: 'This is a Lab that wishes to update their current Merge LIS to xLab. Web Portals are important to them.' followed by a vertical cursor. At the bottom of the dialog are two buttons: 'Cancel' on the left and 'Save' on the right.

Customer Info

Customer | Instruments | Hosts | Notes

Special Notes for this Calc Sheet

This is a Lab that wishes to update their current Merge LIS to xLab. Web Portals are important to them.

|

Cancel Save

ApvCalcSheet Operational Instructions

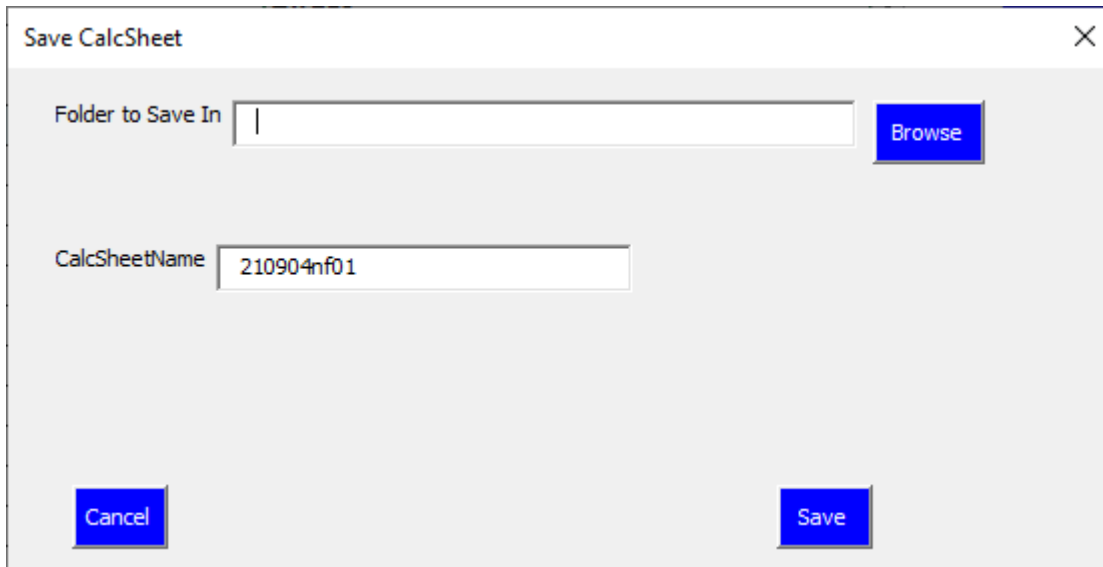
To Save or Cancel

Once you have completed entry into the Customer Info form, click on Save, this will save the data you entered on the form. **IT WILL NOT SAVE THE CALCSHEET.** Clicking on 'Cancel' will close the Form without saving your changes.

Save

The Save Button will save your CalcSheet. NOTE: You cannot save the CalcSheet using the Excel Save or Save As.

Clicking on the Save Button will open a Form for you to save your CalcSheet.

A screenshot of a 'Save CalcSheet' dialog box. The dialog has a title bar with the text 'Save CalcSheet' and a close button (X) in the top right corner. Inside the dialog, there are two input fields. The first is labeled 'Folder to Save In' and is empty, with a blue 'Browse' button to its right. The second is labeled 'CalcSheetName' and contains the text '210904nf01'. At the bottom of the dialog, there are two blue buttons: 'Cancel' on the left and 'Save' on the right.

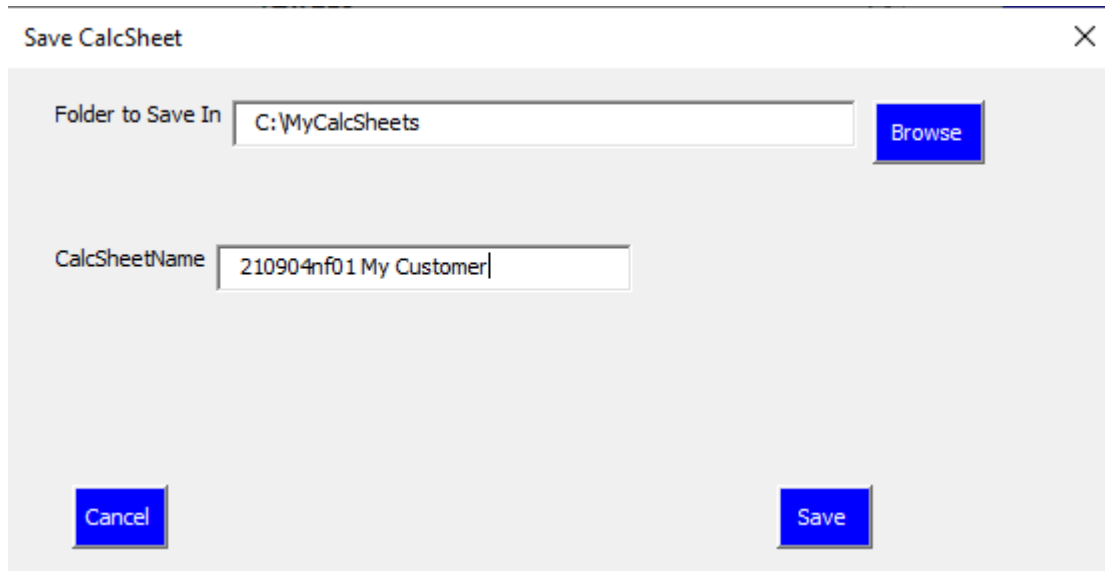
NOTE: The ApvCalcSheet will automatically create a Quotation Number (210904nf01 in the example above). Each time (after the initial save of your CalcSheet), the Sequence number will increment.

NOTE: You are given the opportunity to append additional text to the Quotation number. For example it is best to name your CalcSheet with the Customer Name to keep things straight.

ApvCalcSheet Operational Instructions

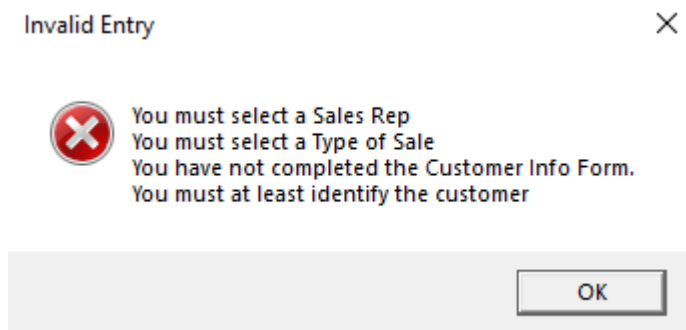
The Saving Process works as follows:

1. Enter or Browse to the Folder where you wish to save the CalcSheet , then enter the customer name after the Quotation Number



The image shows a 'Save CalcSheet' dialog box. It has a title bar with a close button (X). Inside, there is a 'Folder to Save In' text box containing 'C:\MyCalcSheets' and a 'Browse' button to its right. Below this is a 'CalcSheetName' text box containing '210904nf01 My Customer'. At the bottom left is a 'Cancel' button and at the bottom right is a 'Save' button.

When you click on “Save” Button, the ApvCalcSheet will perform validation on the data you entered and if there is any missing data, you will see a Warning Message similar to below:



The image shows an 'Invalid Entry' warning dialog box. It has a title bar with a close button (X). On the left is a red circle with a white X icon. To the right of the icon, the text reads: 'You must select a Sales Rep', 'You must select a Type of Sale', 'You have not completed the Customer Info Form.', and 'You must at least identify the customer'. At the bottom center is an 'OK' button.

Clicking “OK” will return you to your CalcSheet where you can correct your Errors.

Assuming there are no errors, in our example the ApvCalcSheet will save a file into C:\MyCalcSheets with a name of “210904nf01 My Customer.xlsm”. Then close the ApvCalcSheet

CalcSeet Details

The entry of data on the Sales Associate xLab tab is much the same as you have been doing all along. Some areas of special attention are:

ApvCalcSheet Operational Instructions

xLab Starter

You should only choose xLab Starter for customers with limited needs and are just starting out. It is intended to provide a Starting Level for customers. xLab Starter comes with only 90 days support.

Note that xLab Starter no longer comes with one Instrument. If the customer wants an Instrument Interface you must select the appropriate Qty (Additional Instruments or Additional Instruments-New.)

HL-7 Results, HL-7 Orders, HL-7 Charges

These are the interfaces for EMR/EHR and Billing systems. **Please be sure you read the following Notes.**

1. Each of these interfaces must be identified by Vendor (See Customer Info:Hosts.)
2. If the interface has not already been done, you must provide the Vendors' HL-7 Specifications.
3. Not all vendors will allow HL-7 Results without also having HL-7 Orders. You need to check with the Vendor before actually quoting to the Customer.

HL-7 DOH Results

DOH stands for Department of Health.

1. Each State has their own specific interface specifications.
2. We have not done any of these interfaces yet so they will all be New.
3. Because of the way states work, these interfaces can take will over 6 months to complete

HL-7 Outbound Orders, H-7 Inbound Results

These are special interfaces that are used to accommodate Genetic Testing. Genetic results are obtained from an instrument. These results are packaged and transmitted to an outside service that produces an extensive report. This report generally is in a PDF for and is attached to the Sample.

Remote xLab

Many customers have a Main Lab where most of the primary testing is done and one or more Remote Labs that perform local testing as well as sending sample to the Main Lab.

Certificates

Any customer that is going to get Web Portal or Remote xLab must have a Domain Name and an SSL Certificate. Some customers have an IT staff that is capable of performing this task while others do not.

1 Year Standard Hosting & Certificate

AP-Visions provide the total service for the Customer

1. Obtain a Hosting Service
2. Obtain and Register a Domain Name
3. Obtain an SSL Certificate for the Domain Name
4. Customer will be required to repurchase each year (can be included in the Support Agreement)

ApvCalcSheet Operational Instructions

1 Year Standard Certificate Only

1. Customers' IT provides the Hosting Service and the Domain Name.
2. AP-Visions obtains the SSL Certificate for the Domain name
3. Customer will be required to repurchase each year (can be included in the Support Agreement)

Premium 5 Year Hosting & Certificate

AP- Visions provides the total service for the Customer and maintains it for 5 years

1. Obtain a Hosting Service
2. Obtain and Register a Domain Name
3. Obtain an SSL Certificate for the Domain Name

Premium 5 Year Certificate Only

1. AP-Visions obtains the SSL Certificate for the Domain name
2. AP-Visions handles the renewal of the SSL Certificate for 5 years