ApvCalcSheet Operational Instructions

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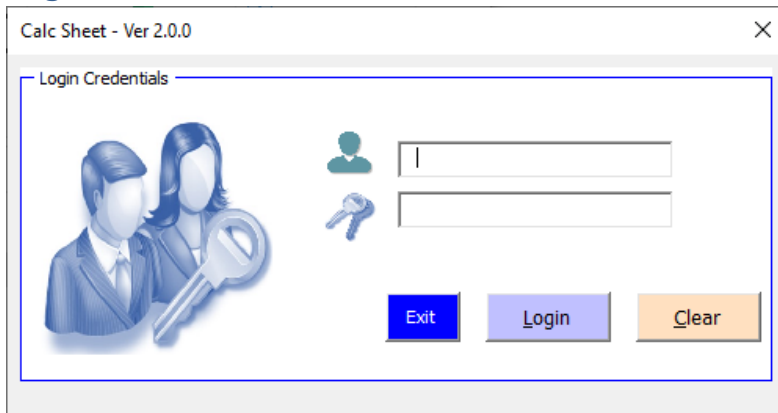
ApvCalcSheet Operational Instructions

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.

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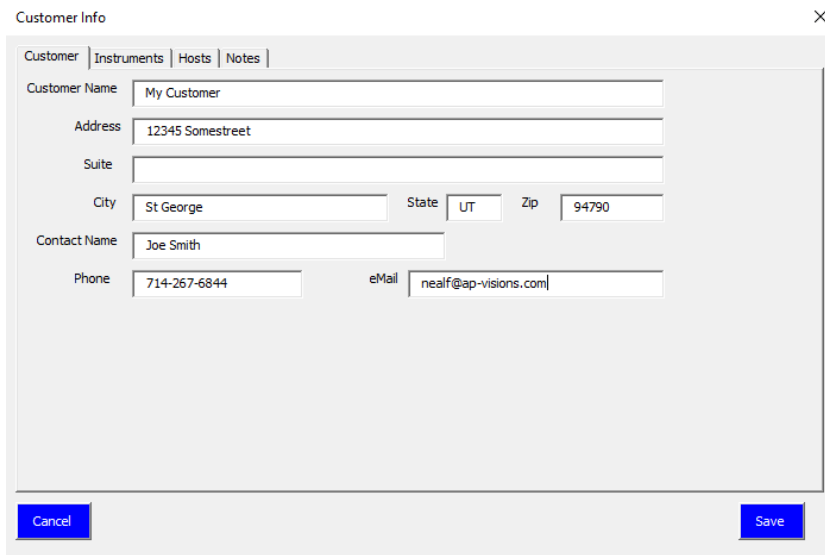
Buttons

The three buttons are:

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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:

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

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Instruments:

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

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

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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	1	eClinical Works
HL7 Orders	1	eClinical Works
HL7 Charges	1	GE Charges
HL7 ADT		
DOH Results	2	Texas and Alabama
Outbound Orders		
Inbound Results		
Reference Lab		

Cancel   Save

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Notes:

The Notes tab of for any special notes and conditions.

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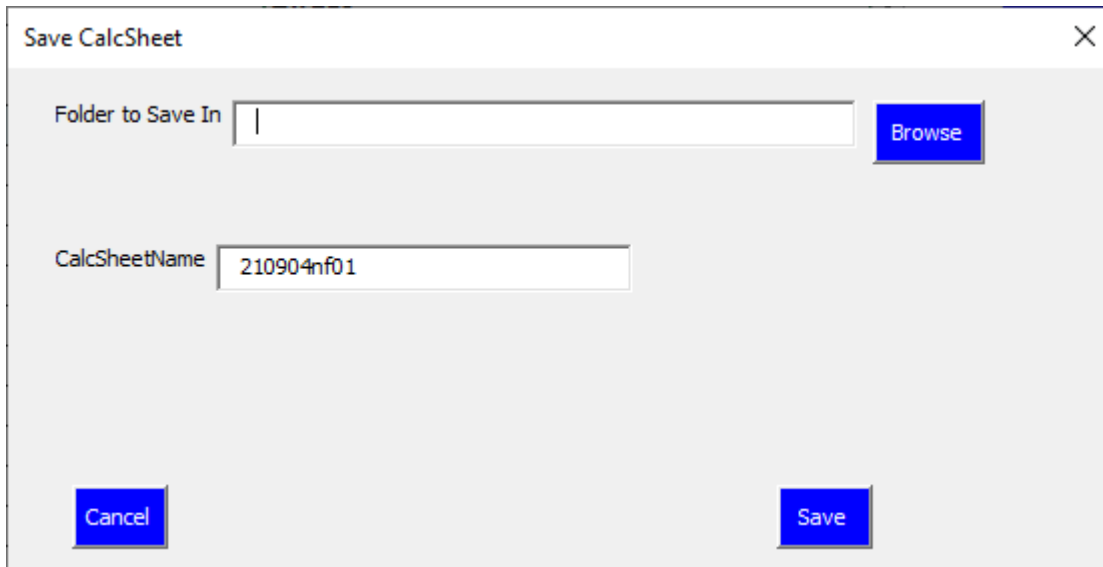
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Once you have completed entry into the Customer Info form, click on Save, this will save the data you entered on the form. **IT WILL NOT SAVE THE CALCSHEET**. Clicking on 'Cancel' will close the Form without saving your changes.

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.
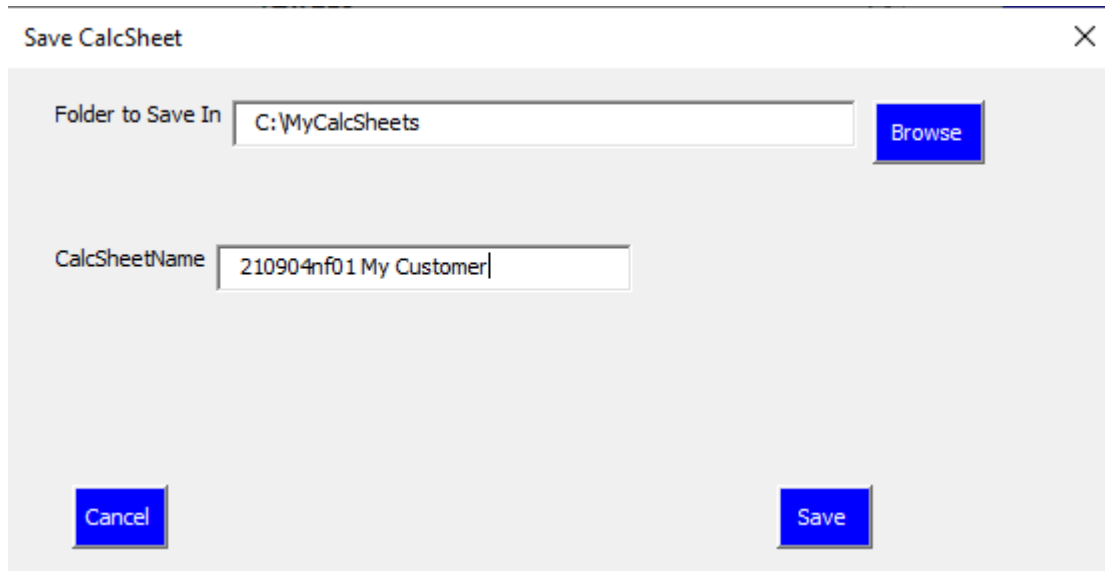

NOTE: The ApvCalcSheet will automatically create a Quotation Number (210904nf01 in the example above). Each time (after the initial save of your CalcSheet), the Sequence number will increment.

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.
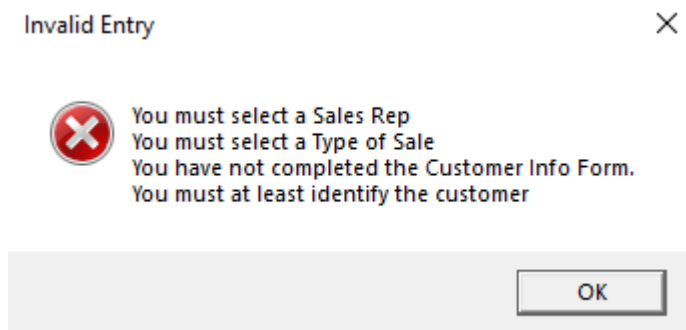
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The Saving Process works as follows:

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

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:

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:

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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)

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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