

## PDS Client Website User's Guide

### Introduction:

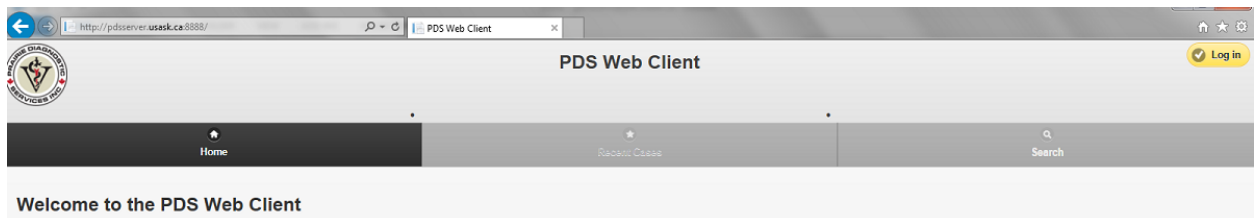
Prairie Diagnostic Services Inc. (PDS) has made some significant improvements to the client web access which is available through your desktop, laptop or mobile device.

Current changes include:

- Improvements to account settings such as: ability to change user name, password.
- View recently submitted cases.
- View New Reports – these will be dated and time stamped to indicate when they were updated.
- Direct link to **PDS website** [www.pdsinc.ca](http://www.pdsinc.ca) is available on this screen with reference documents and submission forms.
- Ability to maintain email addresses for results reporting and financial reporting.



### Account Verification and Log in


1. To access client website go to **URL: <http://pdserver.usask.ca>**
2. To log in to the client website – click on the ‘Log in’ button in the top right hand corner.



3. A new screen opens where you enter the user name and password you were originally emailed in May 2014. The option to remember your password may be selected. Submit.

4. Client website opens to Recent Cases Screen.
5. Please verify all your email address requirements by going to the ‘Basic Settings’

button   the first time you log in.

6. Help buttons  have been added to many of the screens to define what the fields are used for and assist you to determine what email addresses you may want to utilize. **Note:** All email fields may contain the same email address if this fits your business needs.
7. When you log in to your account for the first time the following steps must be followed to ensure valid emails have been provided:

**a. Basic Account Settings:**

- i. Client Name: This is the client name that has been entered into the PDS accounting system. The PDS account number appears in brackets and represents the unique code assigned to your clinic (generated at PDS).
- ii. Address: mailing address (as appears in PDS accounting program as provided by client).
- iii. User Name: This can be the account email address or a name that you choose that is unique and easier to remember. The first character must be a letter for either option (required field).
- iv. Account Contact Name: The individual within your organization that inquiries can be directed to (required field).
- v. Account Email: Email address where the Account Contact can be reached (required field).
- vi. Submit.

**Basic Account Settings**

Report Settings Accounting Settings Help

Client Name PDS - RESEARCH AND DEVELOPMENT (PDSRES0001)

Address 52 CAMPUS DRIVESASKATOON, SK S7N 5B4

User Name dev@pds.usask.ca

Account Contact Name Dan Andrews

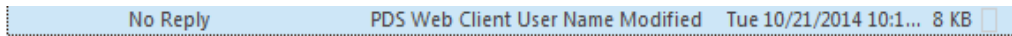
Account Email dan.andrews@pds.usask.ca

Account Verified True

Change Password (Optional)

Submit

- vii. You will receive two emails the first time this is done.



This indicates that a change has occurred to your account and to report if this is an error.

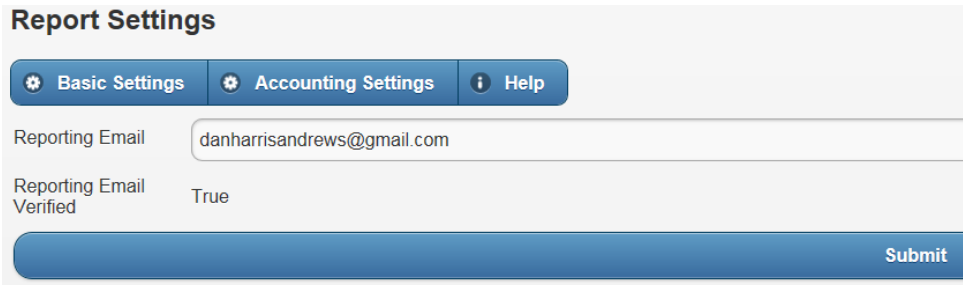


This indicates that you must follow the link in the email to verify your email address. You will not be asked again to verify unless there is a change. Verifying an email address involves sending an email to your email inbox and having you click a confirmation link in the email.

**b. Report Settings**

- i. This is the email address to which you want your result reports sent. Please use a single email address here. If you require further email distribution within your organization we recommend that you set up forwarding rules within your email software.
- ii. Submit.

- iii. If the email has already been verified once, the **Reporting Email Verified** will indicate 'True'. If it has not been verified, a verification email will be sent to that email address and the link in the email must be clicked to confirm.



**Report Settings**

Basic Settings Accounting Settings Help

Reporting Email danharrisandrews@gmail.com

Reporting Email Verified True

Submit

**c. Accounting Settings:**

- i. Invoice Email: Invoices are sent out for each case with details of the testing. 'Invoice Email' represents the email address where you want these invoices sent to. If this is a new email address it must be verified.
- ii. Statement Email: The first week of the month a statement and statement summary for the previous month is sent to the email address indicated in this field. The statement provides a high level view of cases and total amounts for the case. Further details can be found on the case-specific invoice. The Statement Summary is an Excel spreadsheet which includes details of the submission numbers, invoice numbers, tests performed, total dollars, owner name and Incident (if used). Clients have found this file a useful tool for sorting within Excel and paying by Purchase order numbers if required. If this Statement Email is a new email address it must be verified.

## Accounting Settings

**Basic Settings** | **Report Settings** | **Help**

Invoice Email: pds.info@usask.ca

Invoice Email Verified: [Click To Send Verification Message To: pds.info@usask.ca](#)

Statement Email Verified: dan.andrews@usask.ca

Statement Email Verified: True

Fax Number: (000) 000-0000

**Submit**

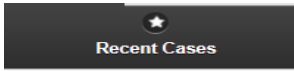
## Email Verification

Your email (pds.info@usask.ca) has been verified. Thank you.

### Subscriptions for pds.info@usask.ca

You have on or more subscriptions for your email. [Click here](#) to view or change your subscriptions.

## Access to Reports and Status

1. To access recent cases click on . From this screen you have the option to view Recent or New Reports. Recent reports are cases that have been received and accessioned; there may or may not be any results available. New Reports provides you with a real time look at what submissions have been reported including date and time the last change was made.

Recent Cases

**Recent** | **New Reports**

[Print](#) [Columns](#)

| # | Case Number | Area | Species | Owner | Clinic # | Date Received | Report Date | Status |
|---|-------------|------|---------|-------|----------|---------------|-------------|--------|
|---|-------------|------|---------|-------|----------|---------------|-------------|--------|


2. The key to laboratory areas are as follows:

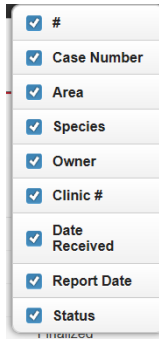
| Area Code | Area Name              |
|-----------|------------------------|
| BACTI     | Bacteriology           |
| CBC       | CBC                    |
| CHP       | Chemistry Panels       |
| CPEND     | Endocrine (CP)         |
| CHSCH     | Chemistry              |
| CYT       | Cytology               |
| ESLEND    | Endocrine Services Lab |
| HEM       | Hematology             |
| IMM       | Immunology             |
| M-SERO    | Serology               |
| NEC       | Necropsy/Biopsy        |
| PARA      | Parasitology           |
| PCR       | PCR                    |
| REFERRAL  | Referral               |
| TOX       | Toxicology             |
| UR        | Urinalysis             |
| VIR       | Virology               |

3. Results are colour coded as an indicator of status. The colour coding is as follows:

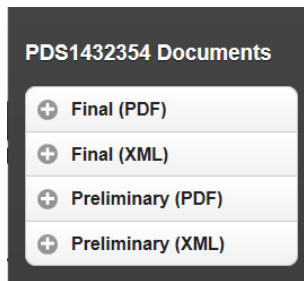
- a. Plain text – testing in the area has been ordered.
- b. Blue – testing is underway and results may or may not be available.
- c. Green – Testing in the area is final and has been authorized and signed.

| Result Color Codes |                                                   |
|--------------------|---------------------------------------------------|
| Color              | Description                                       |
| Plain Text         | Area has been ordered.                            |
| Blue               | This area is underway and results may be present. |
| Green              | This area has been finished and signed.           |

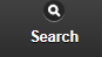
4. You may choose which columns to display by clicking on  and checking or unchecking the columns you want in your view. This capability is particularly helpful when viewing the results on a mobile device with limited screen space.



- a. If you click on the case number the reports that are available to look at appear on the right hand side. If no reports are available the banner indicates pending.



## Search Functions

1. To search submitted cases for your clinic/organization click on .
2. The search screen opens and the following options appear for searching. You may complete one or multiple fields to narrow the search.

The diagram illustrates two versions of a search form. On the left, a form titled 'Search' is shown with a red underline. It contains five input fields: 'Case#' (text), 'Owner' (text), 'Clinic#' (text), 'From' (text), and 'To' (text). Below these fields is a blue 'Search' button. A blue arrow labeled 'Internet Explorer View' points from this form to the right. On the right, a similar form is shown, but the 'From' field is a date picker with a dropdown arrow, and the 'To' field is a text input. A blue arrow labeled 'Google Chrome View' points from this form to the left.

### 3. Field definitions:

- a. Case # - refers to PDS case number.
  - b. Owner – Owner’s name, first, last or portion of the name, minimum three letters.
  - c. Clinic # - clinic number if provided on submission form.
  - d. From and To – submitted date range (include format mm/dd/yyyy eg: 10/21/2014)
4. Once the selection has been entered, click on Search.
  5. A new screen opens that includes all the matches from your search.

Questions, concerns or if you require assistance you can contact us at:

Email: [pds.info@usask.ca](mailto:pds.info@usask.ca)

Telephone: 306-966-7316.