Clarifi COVID-19 Patient Portal

A Guide to Registration

app.clarifi-covid-19.com

Contact support:

covid-support@quadrantbiosciences.com

Introduction 4

Landing Page 4

Account Registration 4
- Resend Verification Code 6
- Password Reset 7

Dashboard 9

Add Profile(s) 10
- Personal Information 10
- Testing Place 13
- Community Testing 13
- K-12 School 15
- College/University 16
- Other 19
- Current Address 22
- Insurance Information 25
- Test Authorization 26

Edit Profile(s) 28
- Update Organization 30
- Update Personal Information 31
- Update Testing Place 32
- Update Current and/or Legal Address 32
- Update Insurance Information 33

Fast Registration at a Community Test Site 35

Submit a COVID-19 Test 35
- Do You Have a Test Kit? 36
- Confirm Required Information 37
- Screening Questions 37
- Sample Collection 39

Organization Managers 41
- Profile Search 41
- Search Fields 42
- Search Results 42
- Registration Search 44
- Sample Exceptions 46
- Correcting Exceptions 47

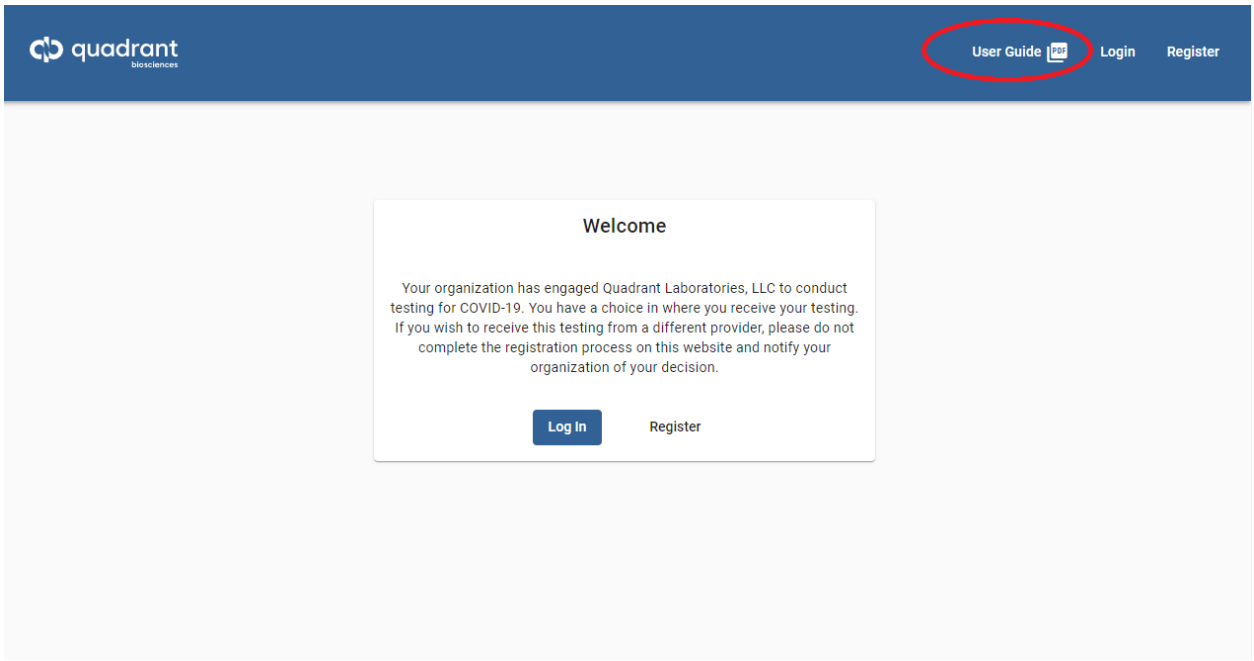
Registration Managers 48
- Search Fields 48
- Search Results 49

Appendix **50**
Authorization Language 50
Privacy Policy 50

Introduction

Welcome to the Clarifi COVID-19 Registration user guide! In this document, you will find an overview of the steps needed to complete the process. If you have any questions or concerns please contact the organization that is providing this service for you.

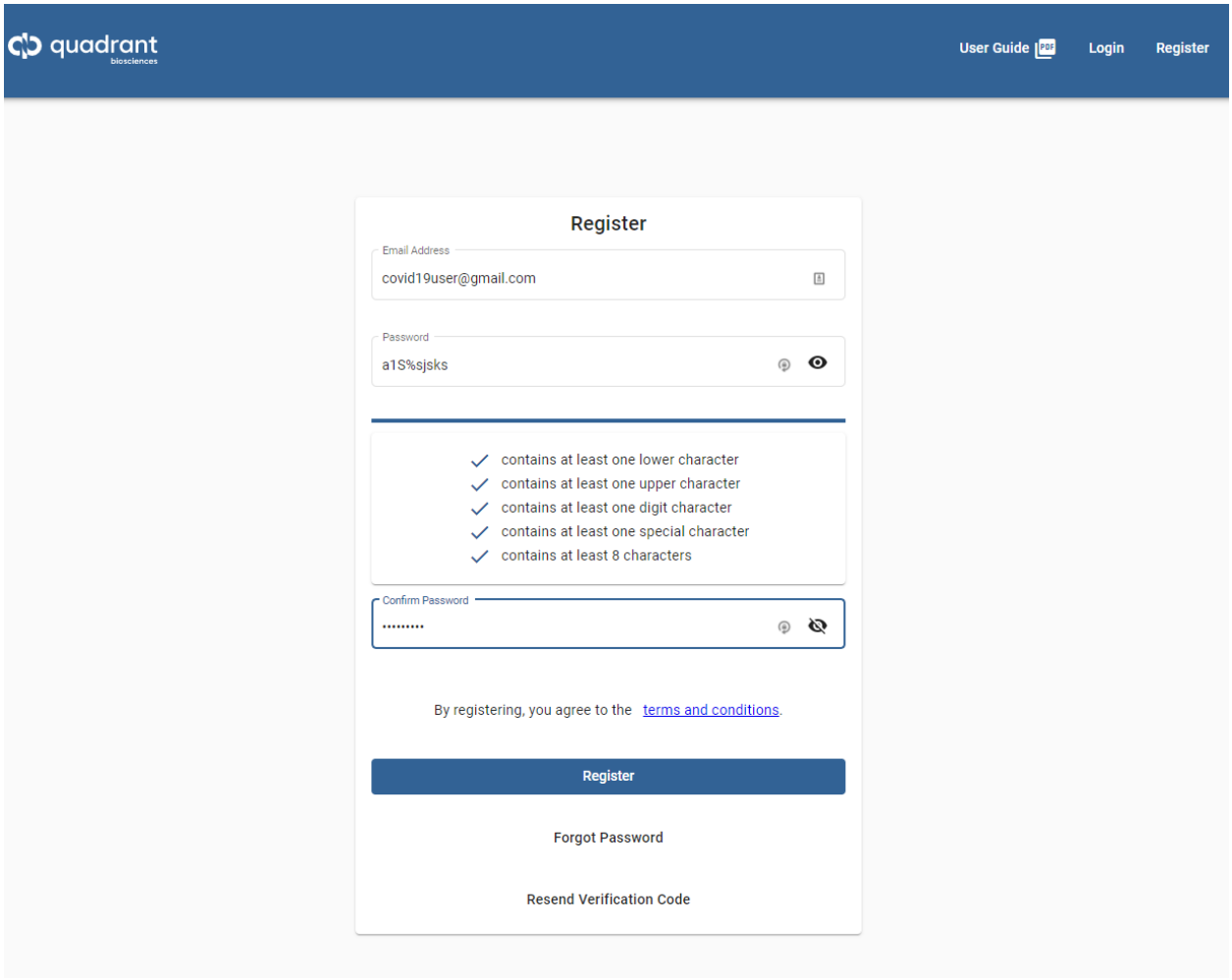
Landing Page



This user guide is always available at the link circled in red above on the application landing page found at **https://app.clarifi-covid-19.com**.

Account Registration

To register a new account, please click ***Register.***



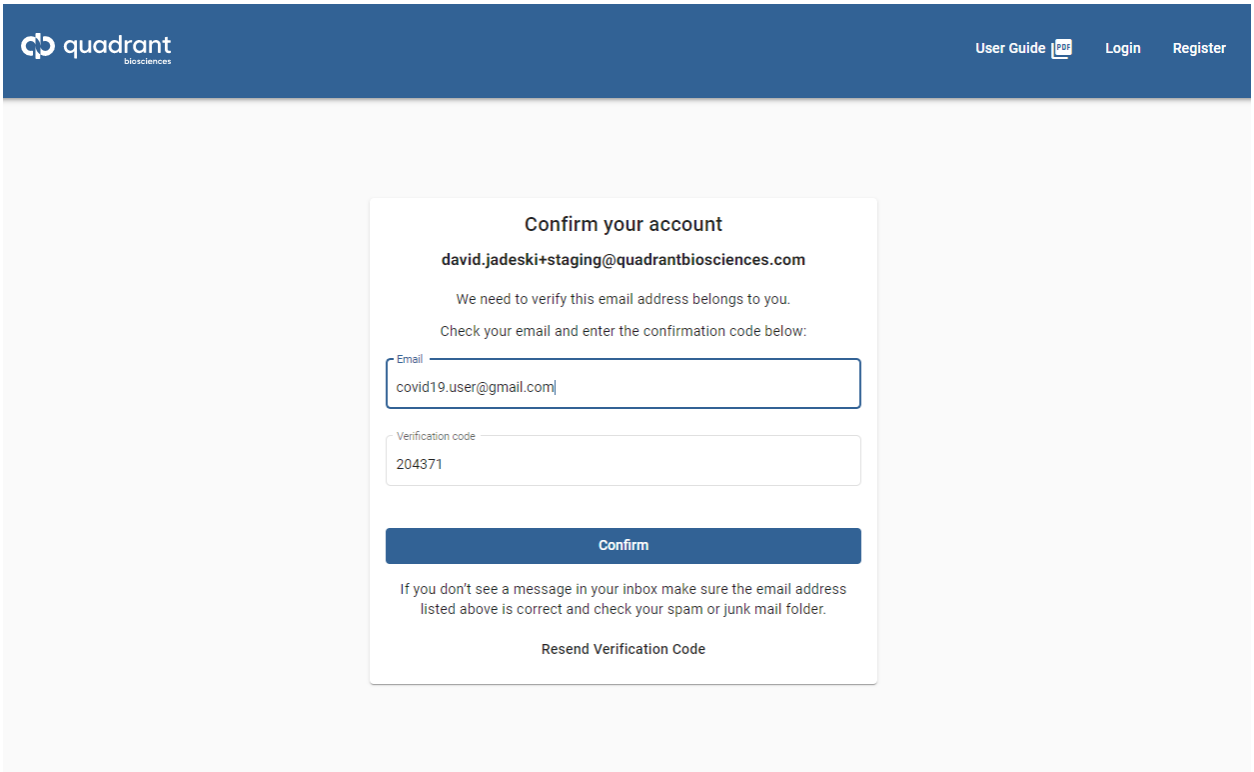
Please enter your email address and a password. Then click ***Register***. You will then receive an email with a confirmation code.

Hello,

Thank you for using the COVID-19 testing service.
Please use the following verification code to complete the process:

036591

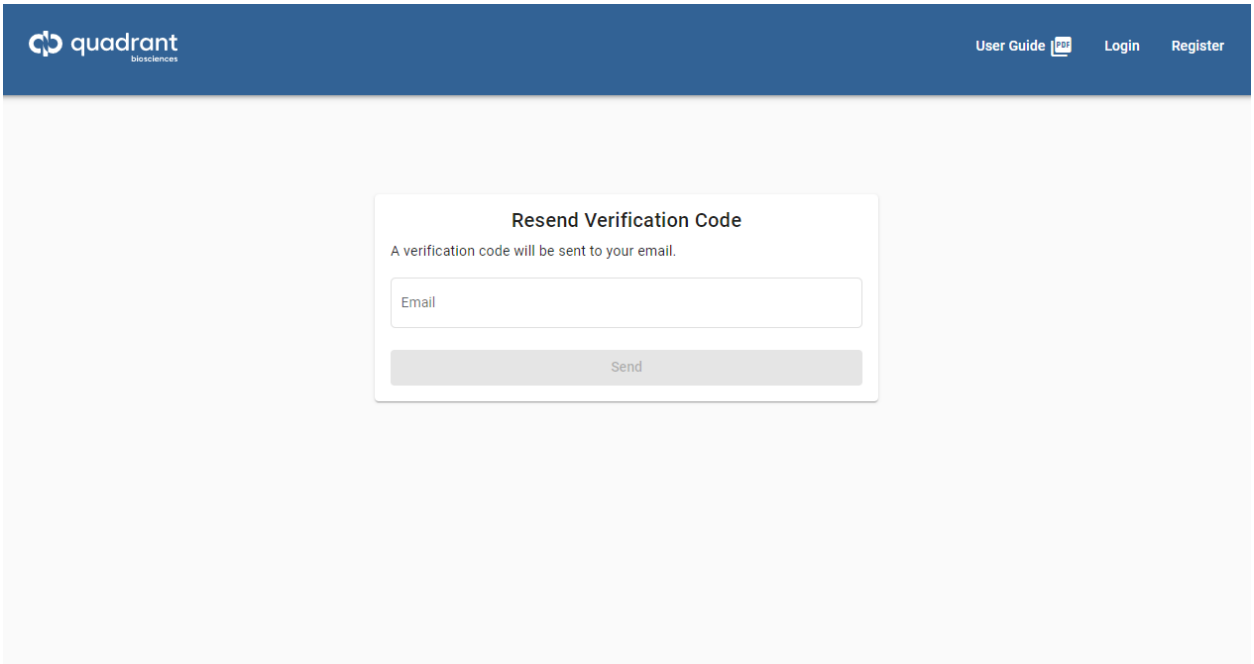
Please copy and paste the verification code in that email into the confirmation page as follows:



Then click ***Confirm***. Once you've confirmed your account, please log in.

Resend Verification Code

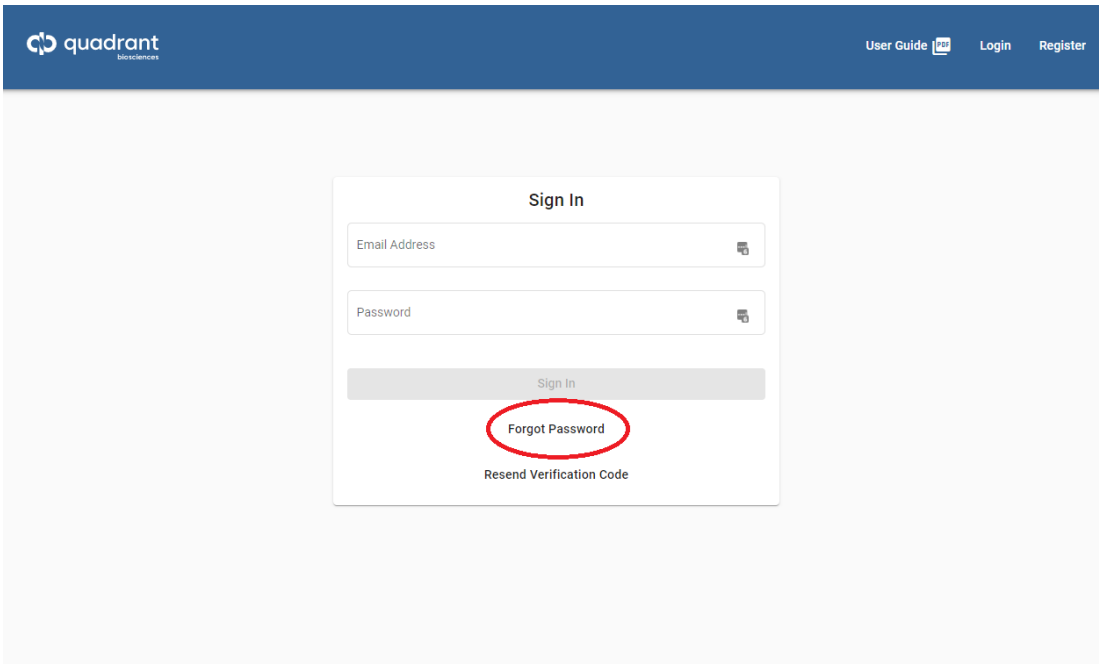
If something goes wrong during this process, you have the option to click ***Resend Verification Code***.



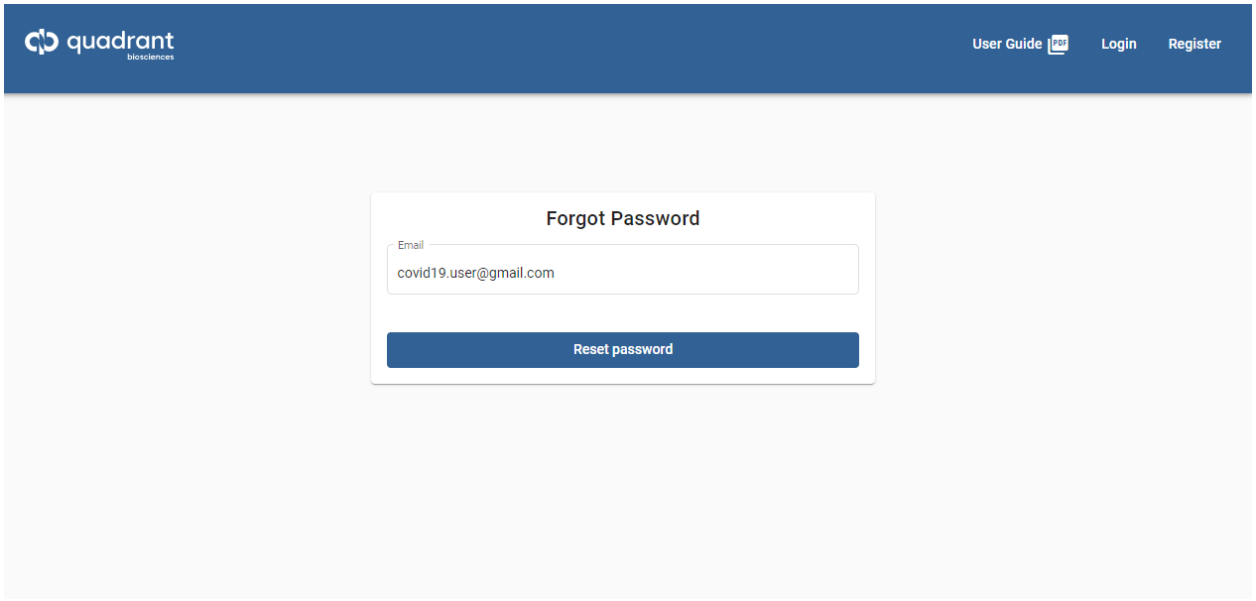
This will send a new verification code to your email address. Please copy and paste that in and log in.

Password Reset

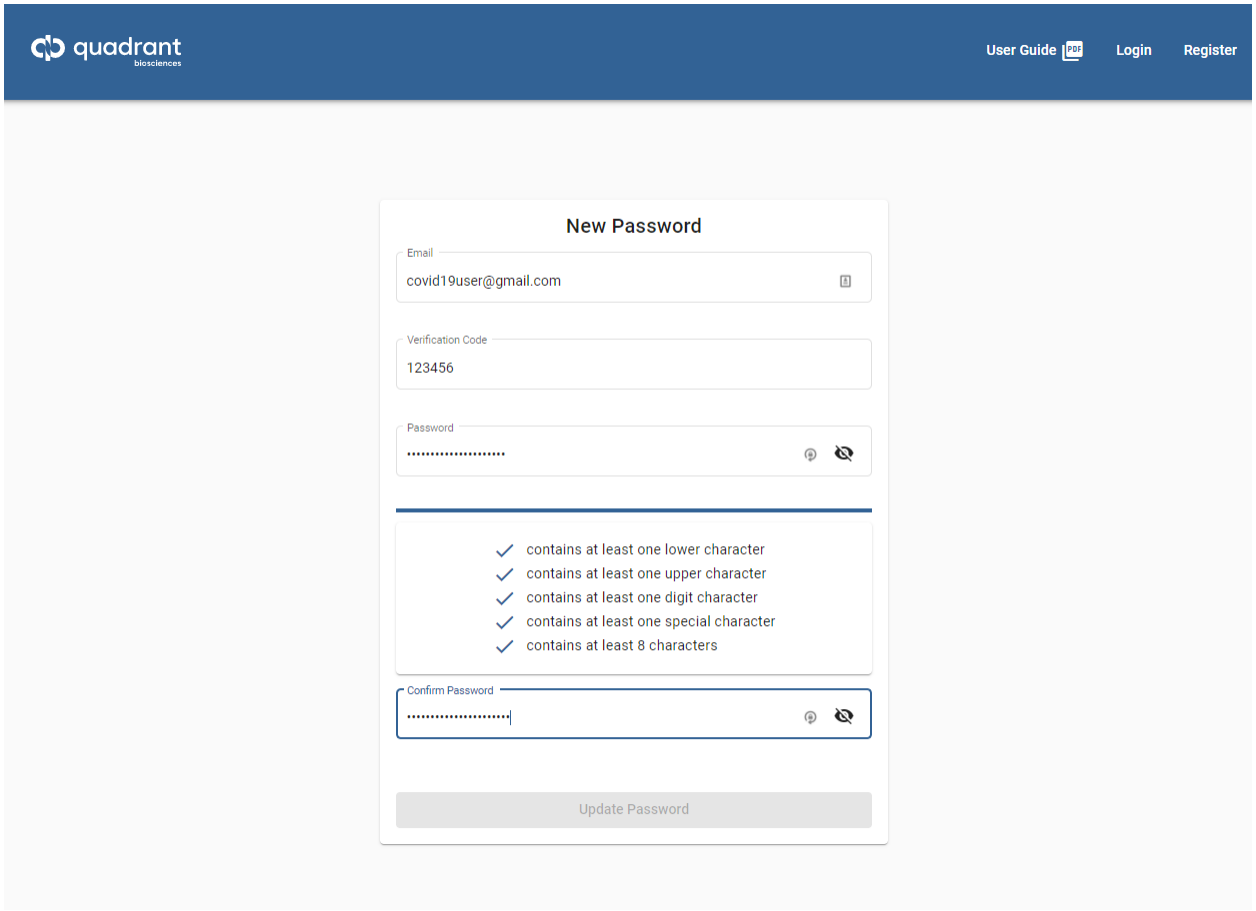
If you forget your password, please click ***Forgot Password*** at the Sign In page:



You'll be asked for your email address.



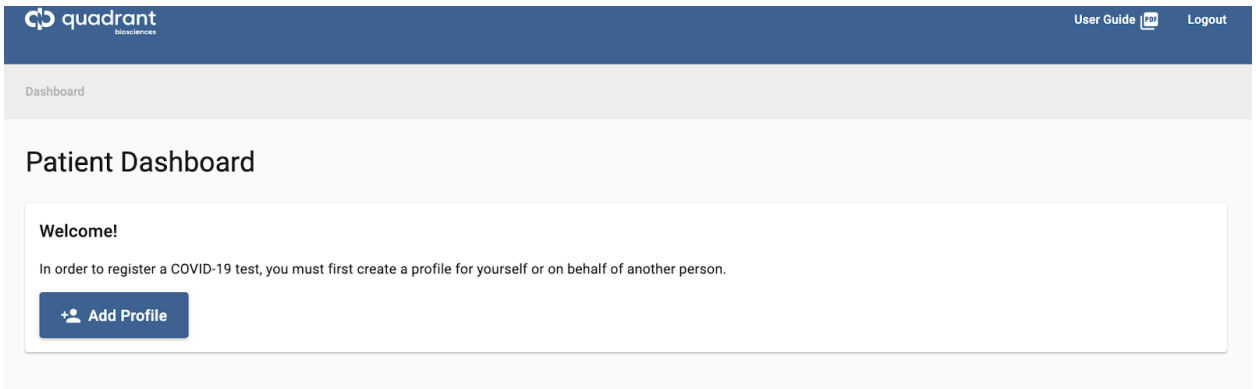
Please provide your email address. This will trigger a new verification code to be sent to your email address. Your browser will be redirected to the following page. DO NOT CLOSE THIS PAGE. Please retrieve the verification code from your email, paste that into the appropriate field, and log in.



When you log in, you'll have two options as shown in the Dashboard section below: ***Add a Profile*** and ***Submit a COVID-19 test***.

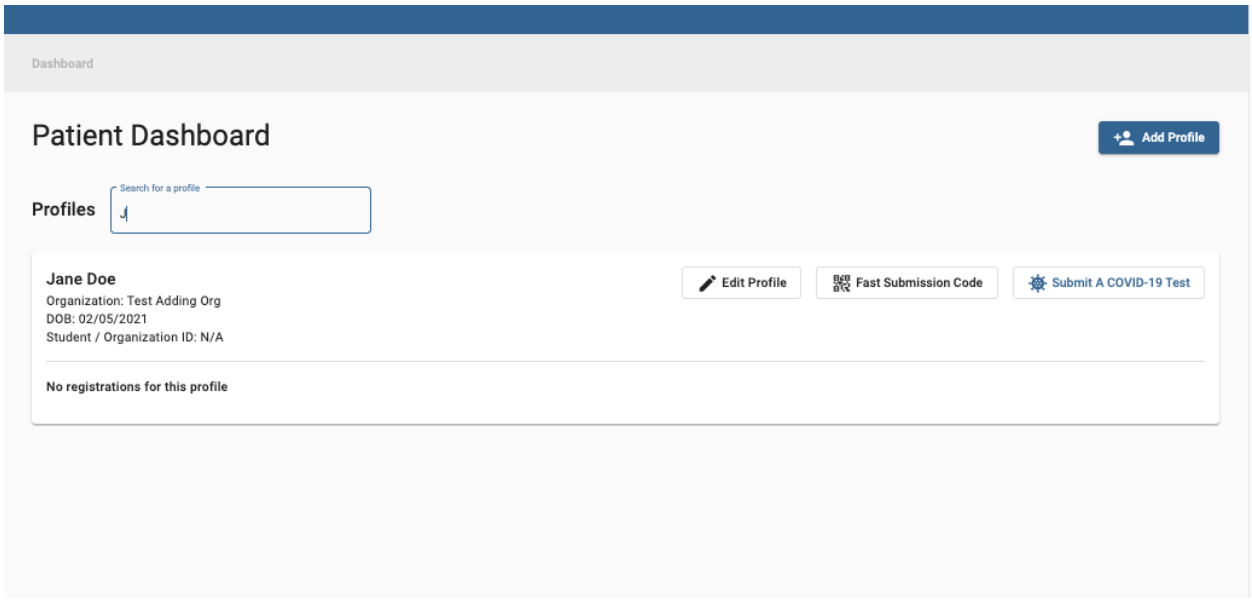
Dashboard

When you initially log in, you'll find a welcome message prompting you to ***Add a Profile***.



To begin, please add a profile for yourself (if you are not a minor). Parents or guardians must add profiles for children in their care.

On the Patient Dashboard, there is an option to search for a profile. Start typing the name of the profile you wish to find and the matching profiles will appear on the page.

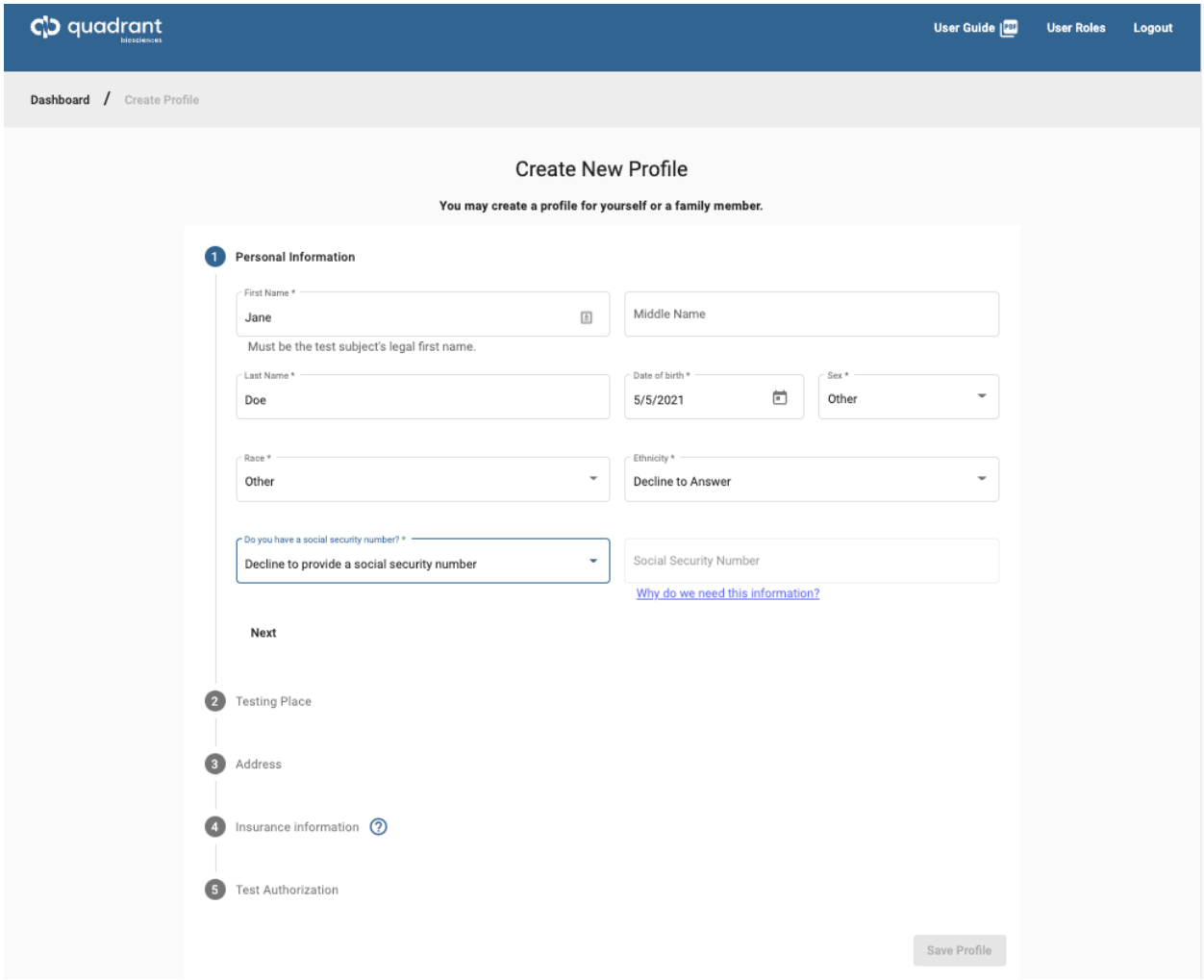


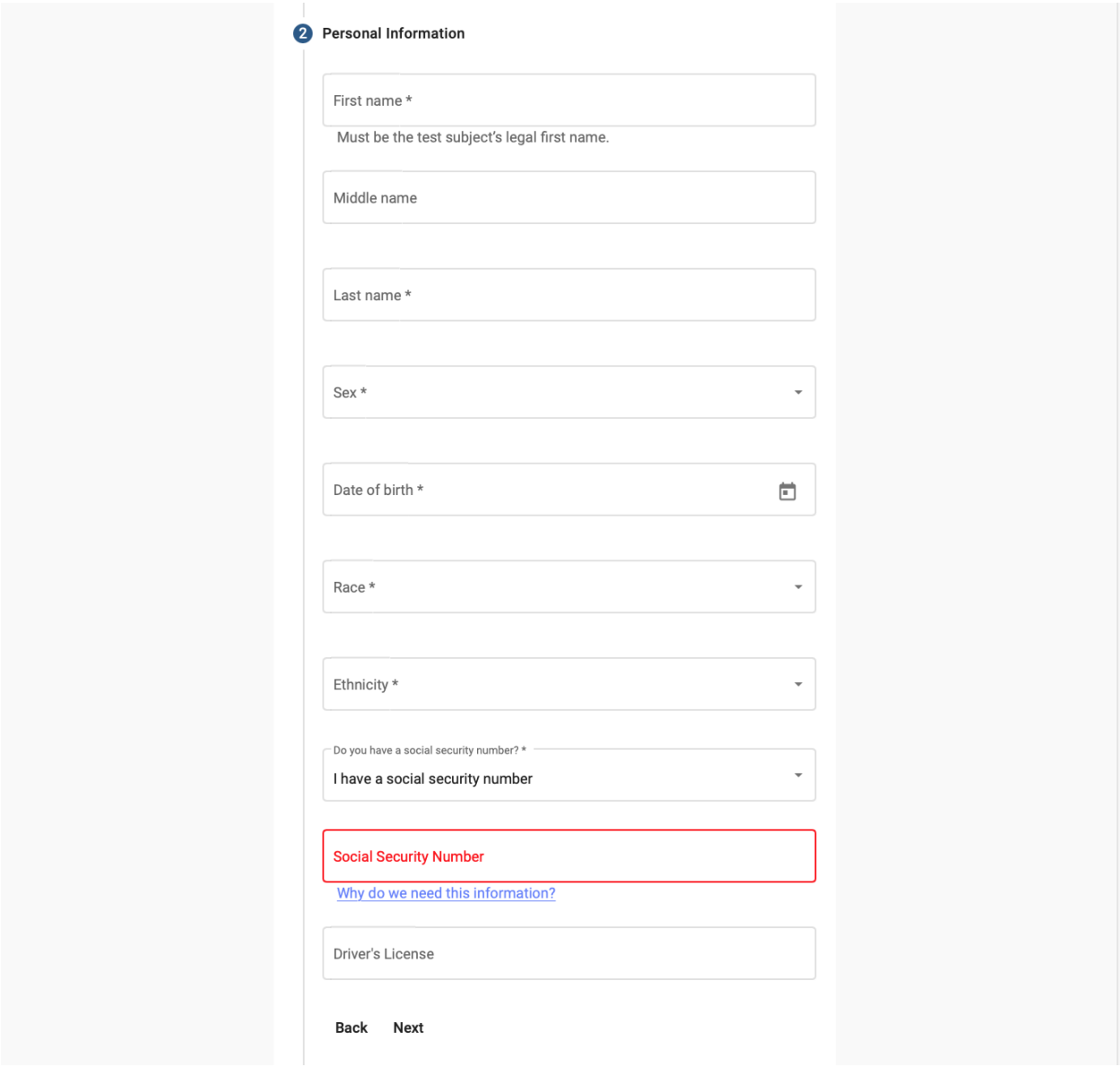
Add Profile(s)

Please click ***Add Profile***. When you do, you'll be directed to a page that will ask you to fill out your personal information. The fields that must be filled out are mandated by the New York State Department of Health, and are required for insurance purposes. All phone numbers must contain 10 digits with only numbers.

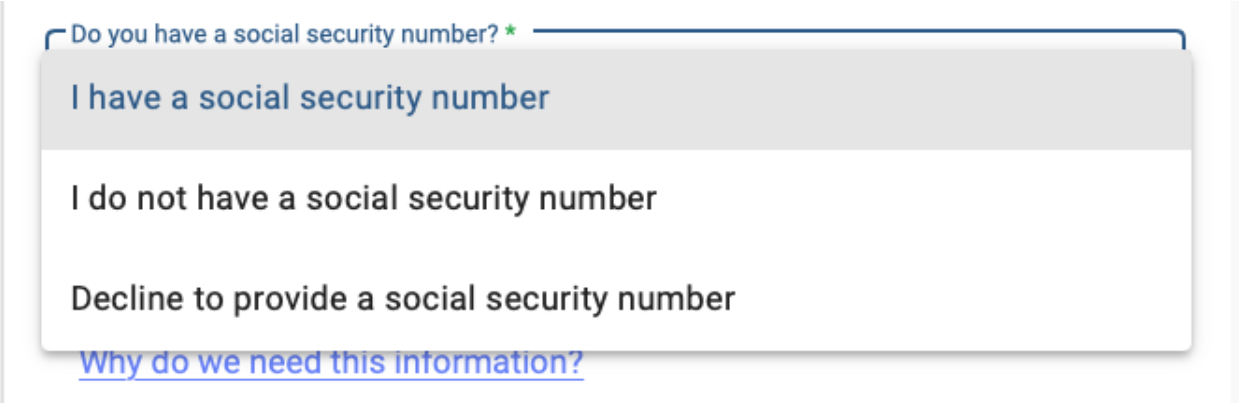
Personal Information

Please click ***Next*** and fill out this profile's personal information.


quadrant biosciences
User Guide
User Roles
Logout
Dashboard / Create Profile
Create New Profile
You may create a profile for yourself or a family member.
1 Personal Information
First Name *
Jane
Must be the test subject's legal first name.
Middle Name
Last Name *
Doe
Date of birth *
5/5/2021
Sex *
Other
Race *
Other
Ethnicity *
Decline to Answer
Do you have a social security number? *
Decline to provide a social security number
Social Security Number
Why do we need this information?
Next
2 Testing Place
3 Address
4 Insurance information
5 Test Authorization
Save Profile



Be sure to choose the appropriate option for “Do you have a social security number”.

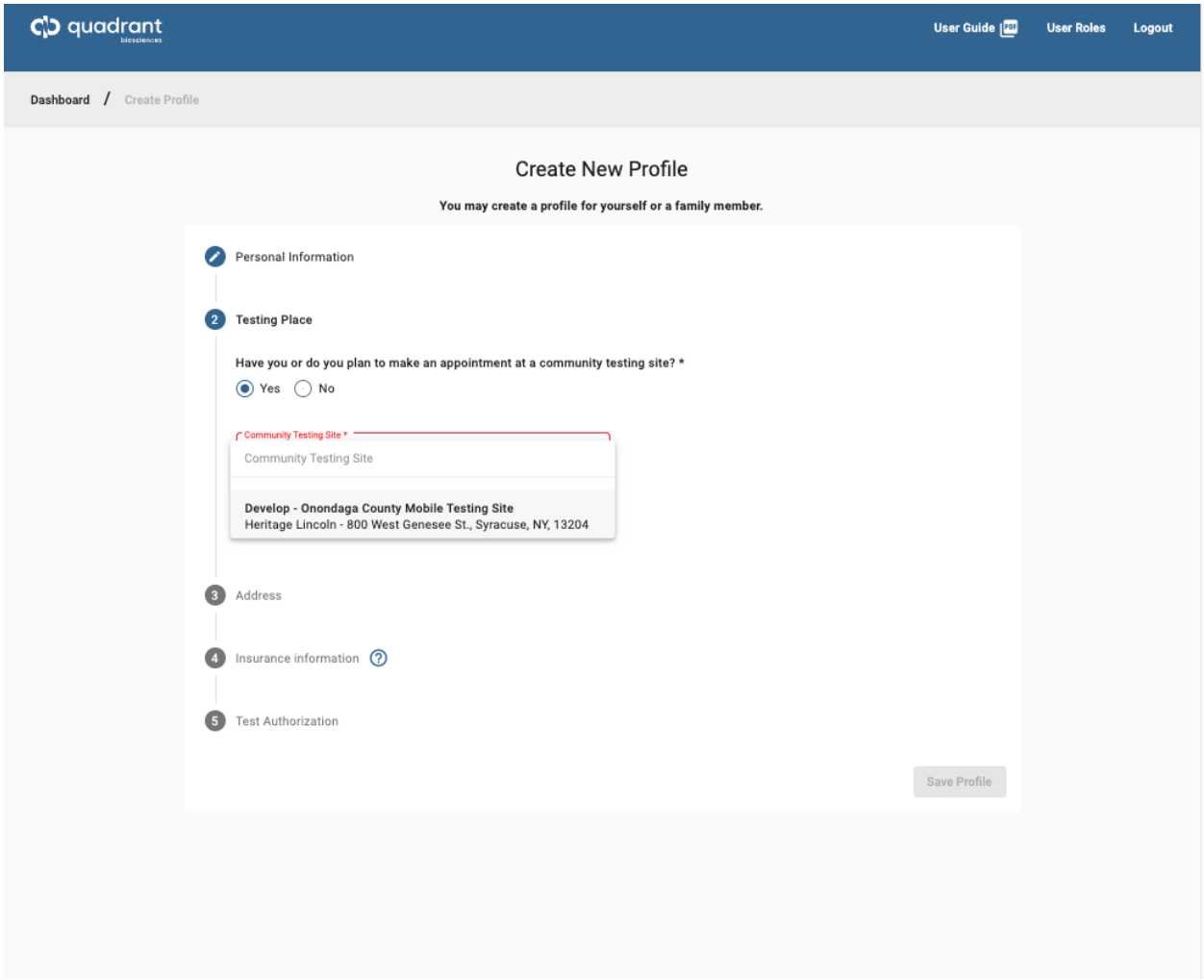


Testing Place

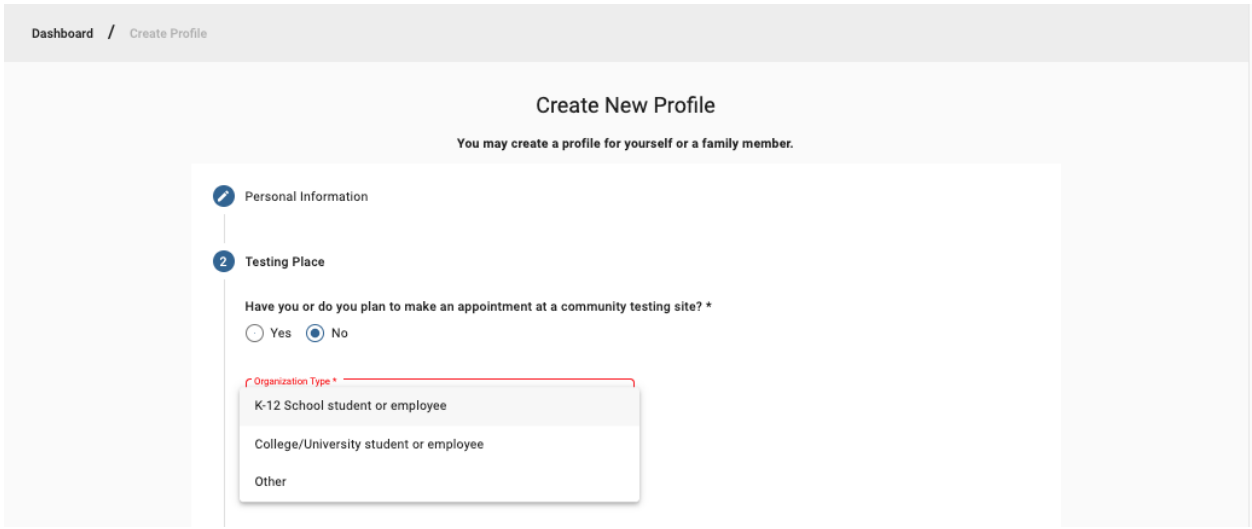
Please indicate whether or not you are planning to be tested at a Quadrant Community Testing Site.

Community Testing

If you select yes, to the community testing site question, you will be presented with a list of Organizations from which you can make a selection.

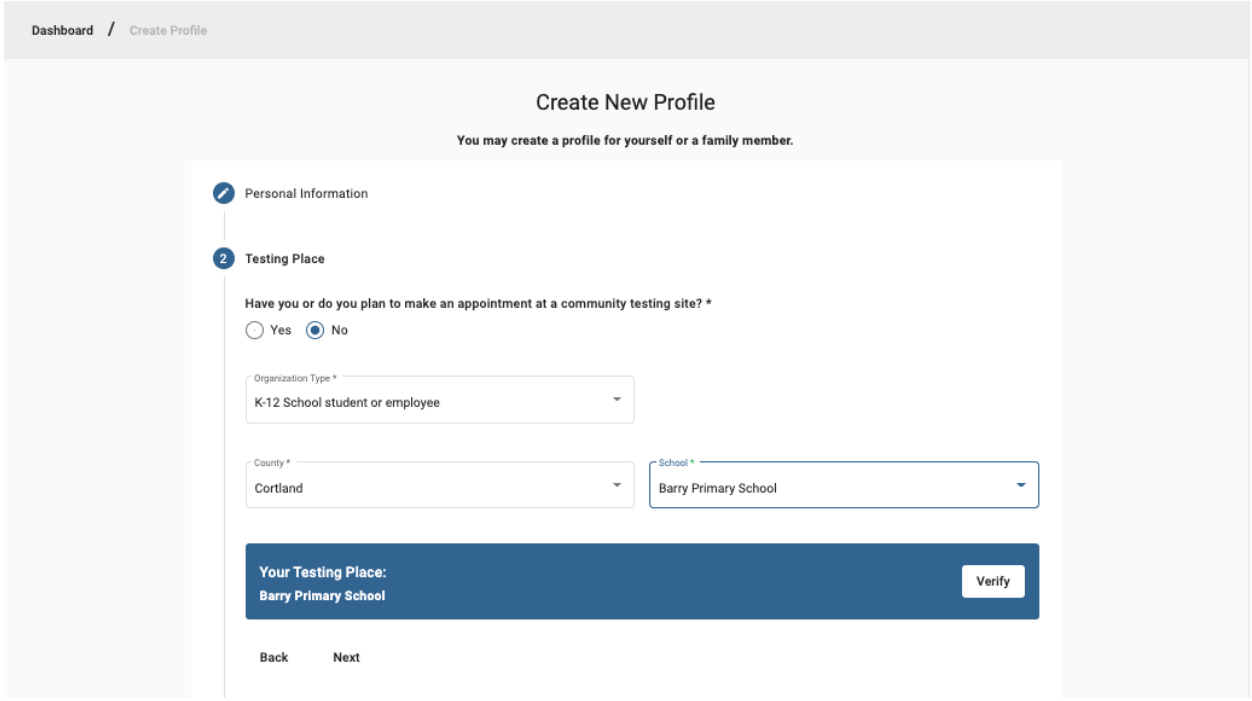


After you have selected the correct community testing site, click Next to fill in your address. If you chose No to the community testing site question, you will be prompted to choose your Organization Type.

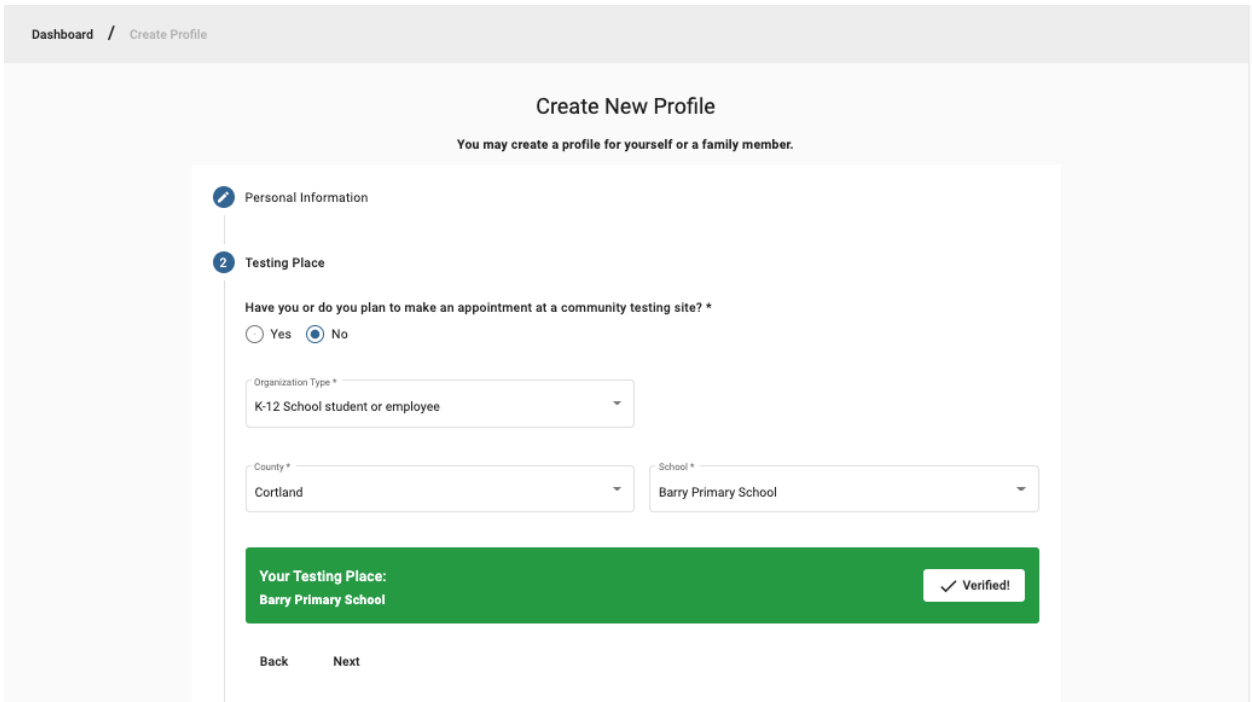


K-12 School

If you select K-12 School you will be presented with a list of Counties from which you need to confirm the county in which your school is located. You can then select the school from the School menu.



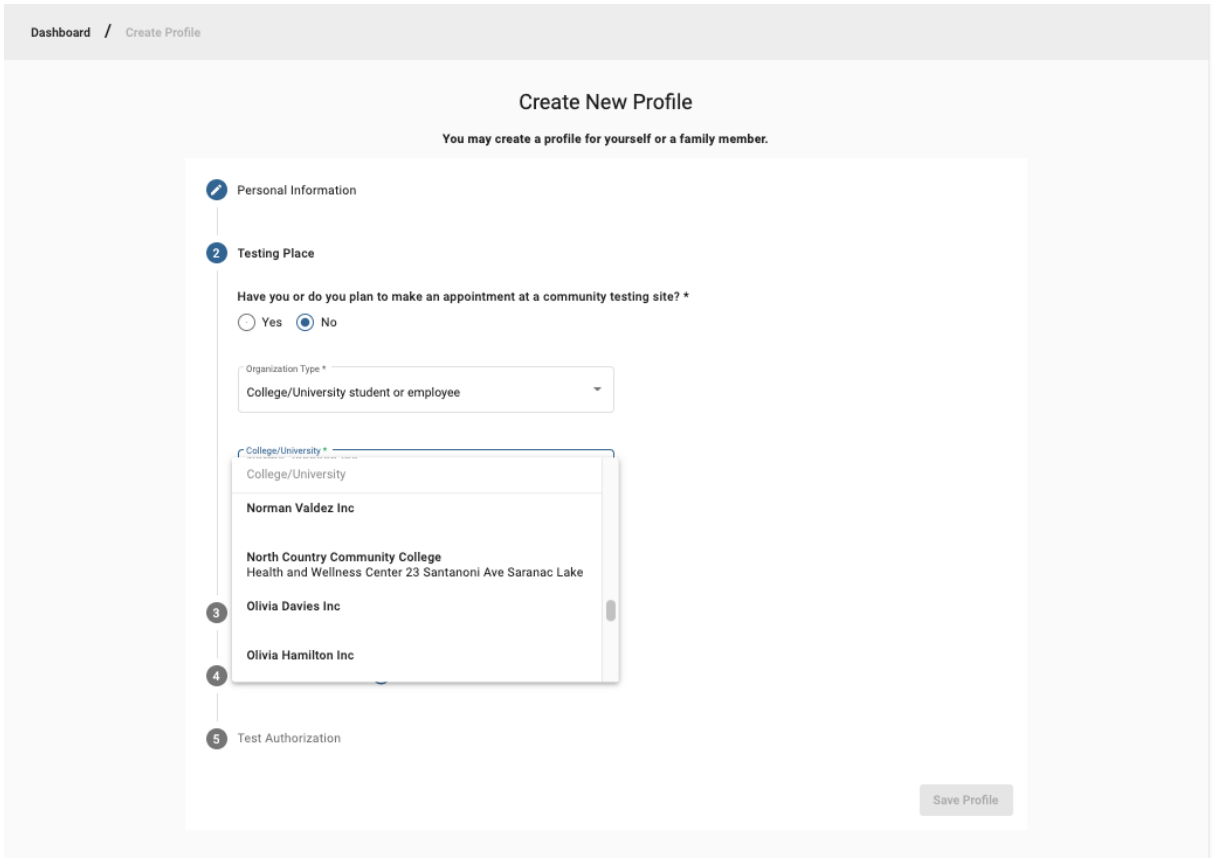
Please verify that your school selection is correct and click Verify. Your choice is confirmed by being highlighted in green as shown below:

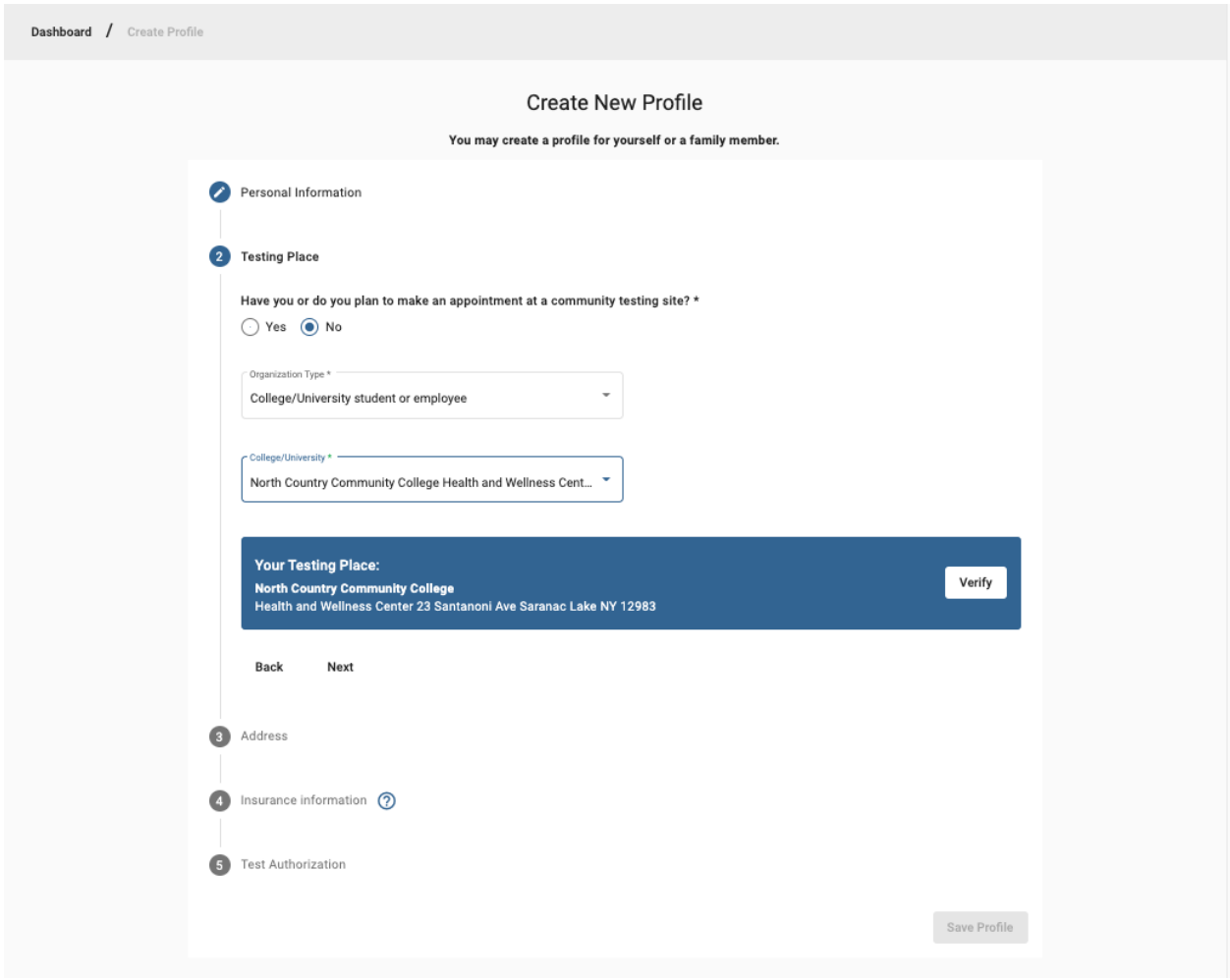


<u>It is very important that you select the correct organization</u>.

College/University

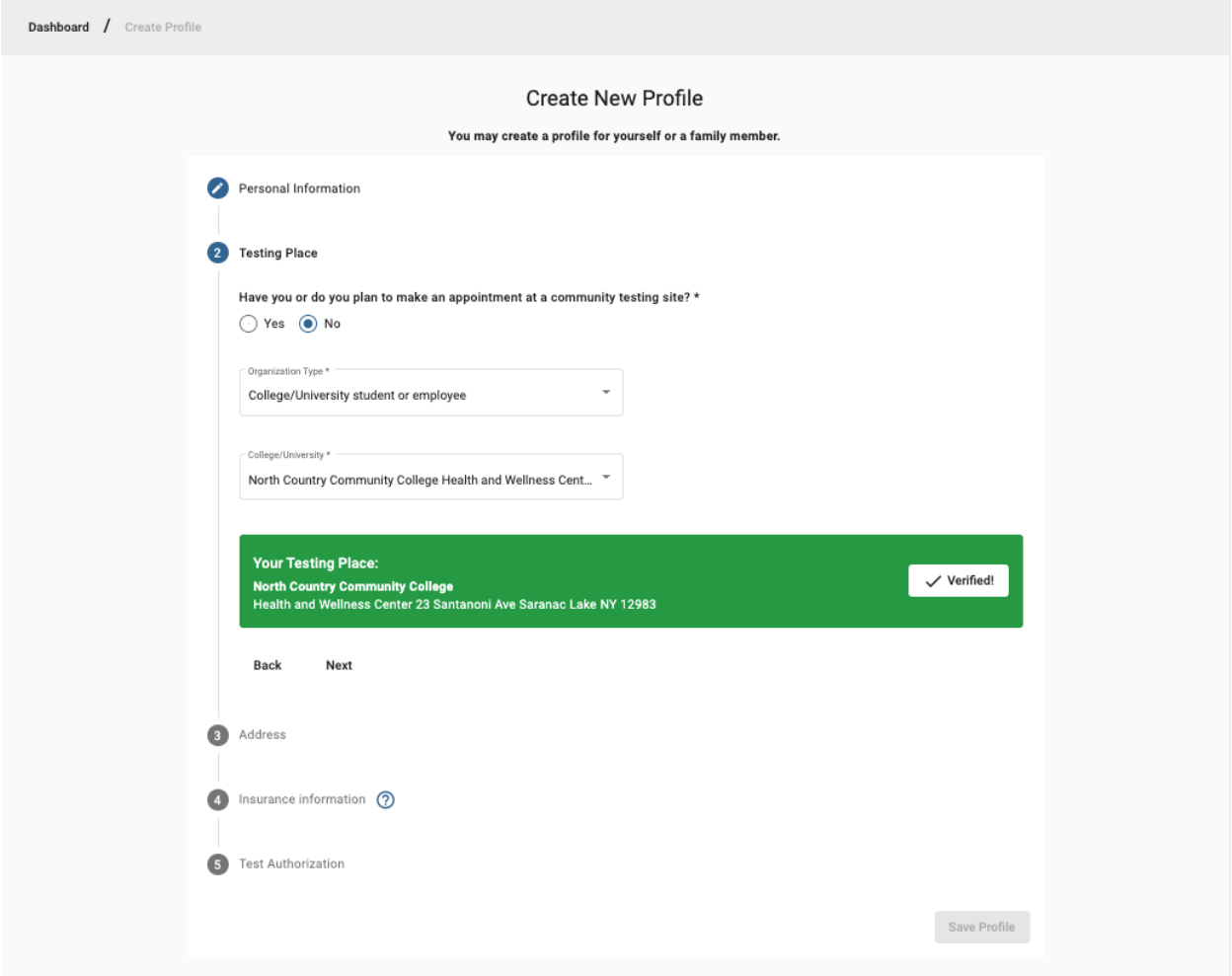
If you select College/University you will be presented with a list of Organizations from which you can make a selecti


Dashboard / Create Profile
Create New Profile
You may create a profile for yourself or a family member.
Personal Information
2 Testing Place
Have you or do you plan to make an appointment at a community testing site? *
Yes
No
Organization Type *
College/University student or employee
College/University *
College/University
Norman Valdez Inc
North Country Community College
Health and Wellness Center 23 Santanoni Ave Saranac Lake
3 Olivia Davies Inc
Olivia Hamilton Inc
4
5 Test Authorization
Save Profile



Having selected your school from the list you will then verify your choice by selecting the Verify button.

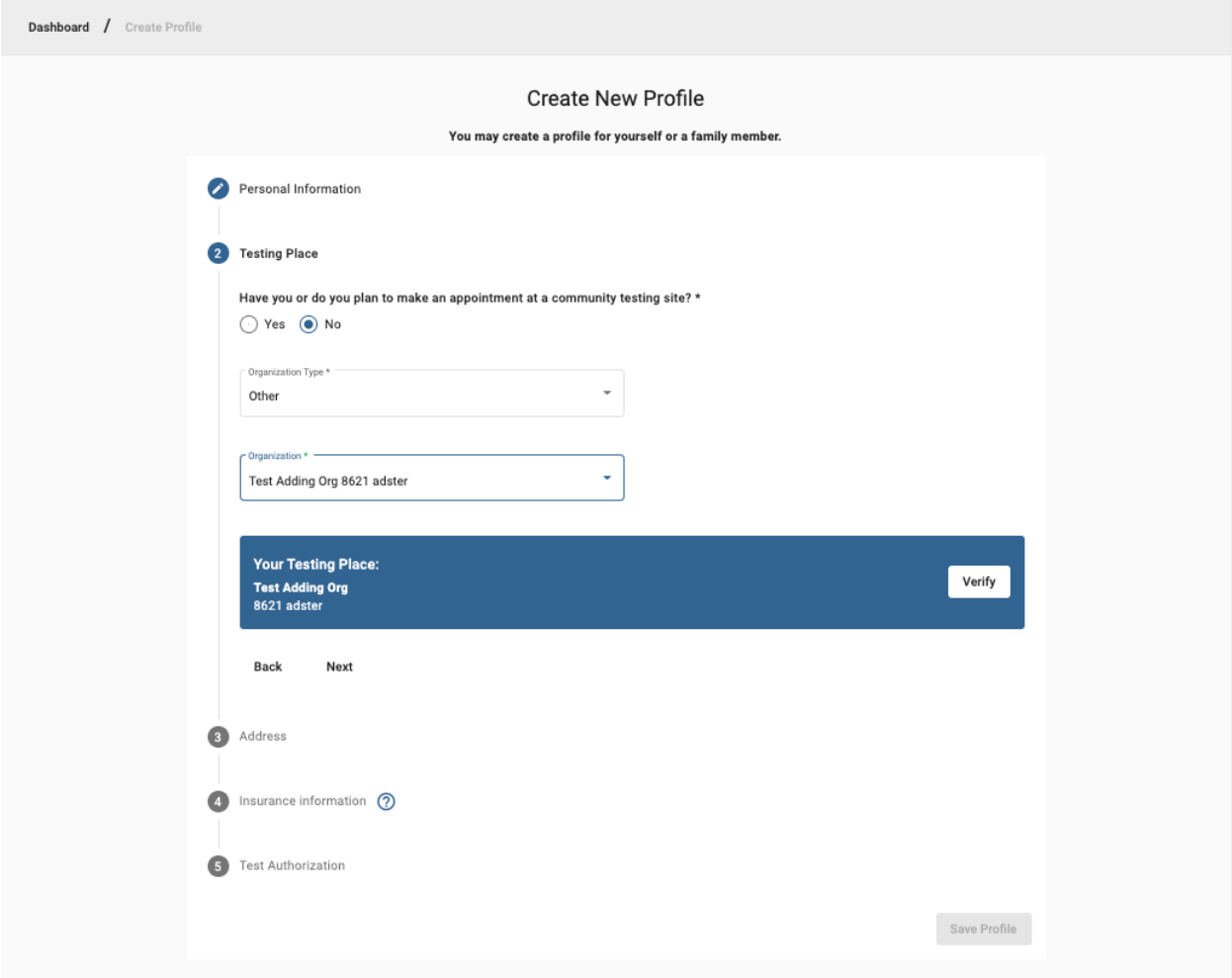
Your choice is confirmed by being highlighted in green as shown below:



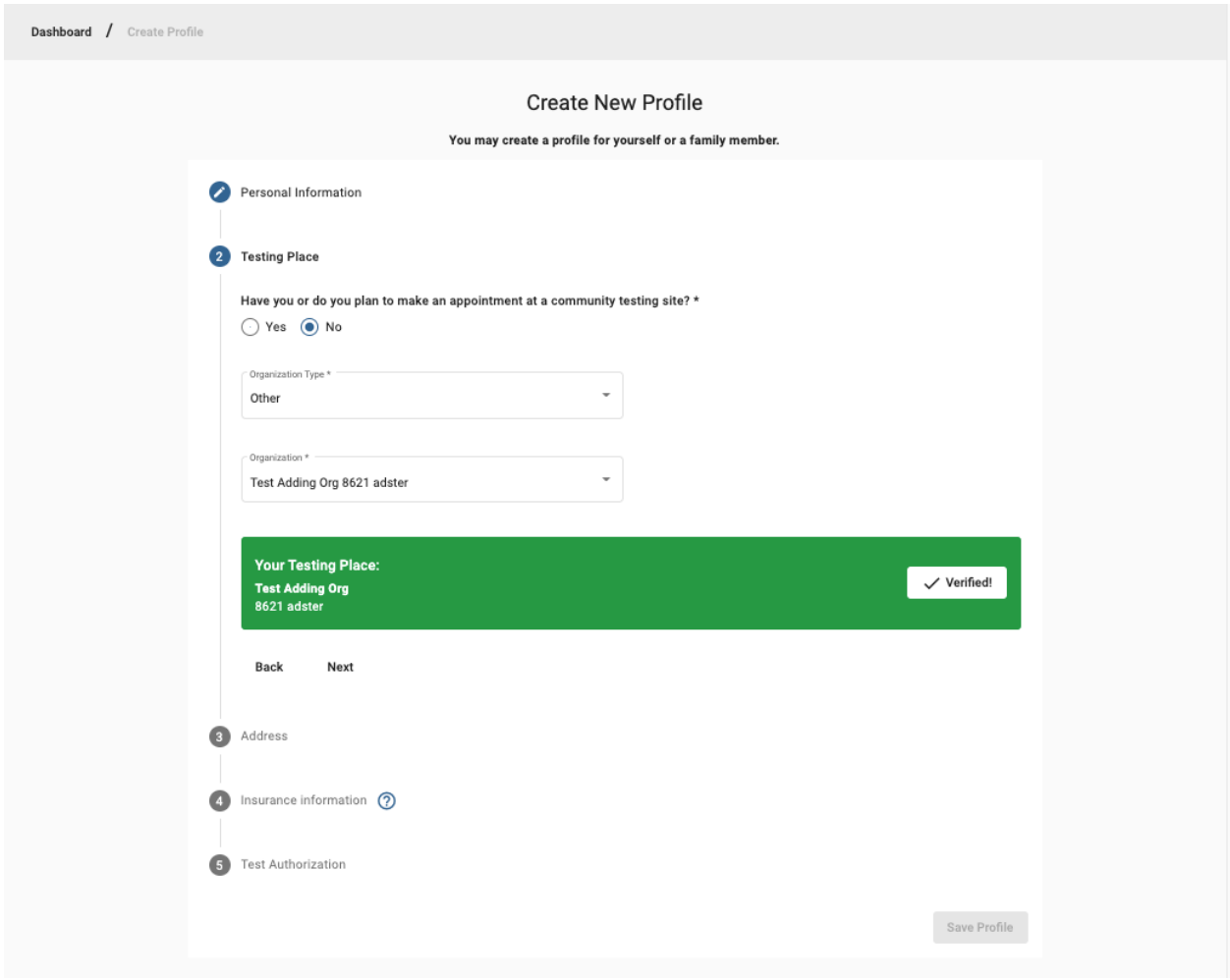
<u>It is very important that you select the correct organization</u>.

Other

If you are not being tested at a Community Testing Site and are a member of an organization that is not a K-12 School or a College or University you should find it in the Other category which is available by selecting the Other button.



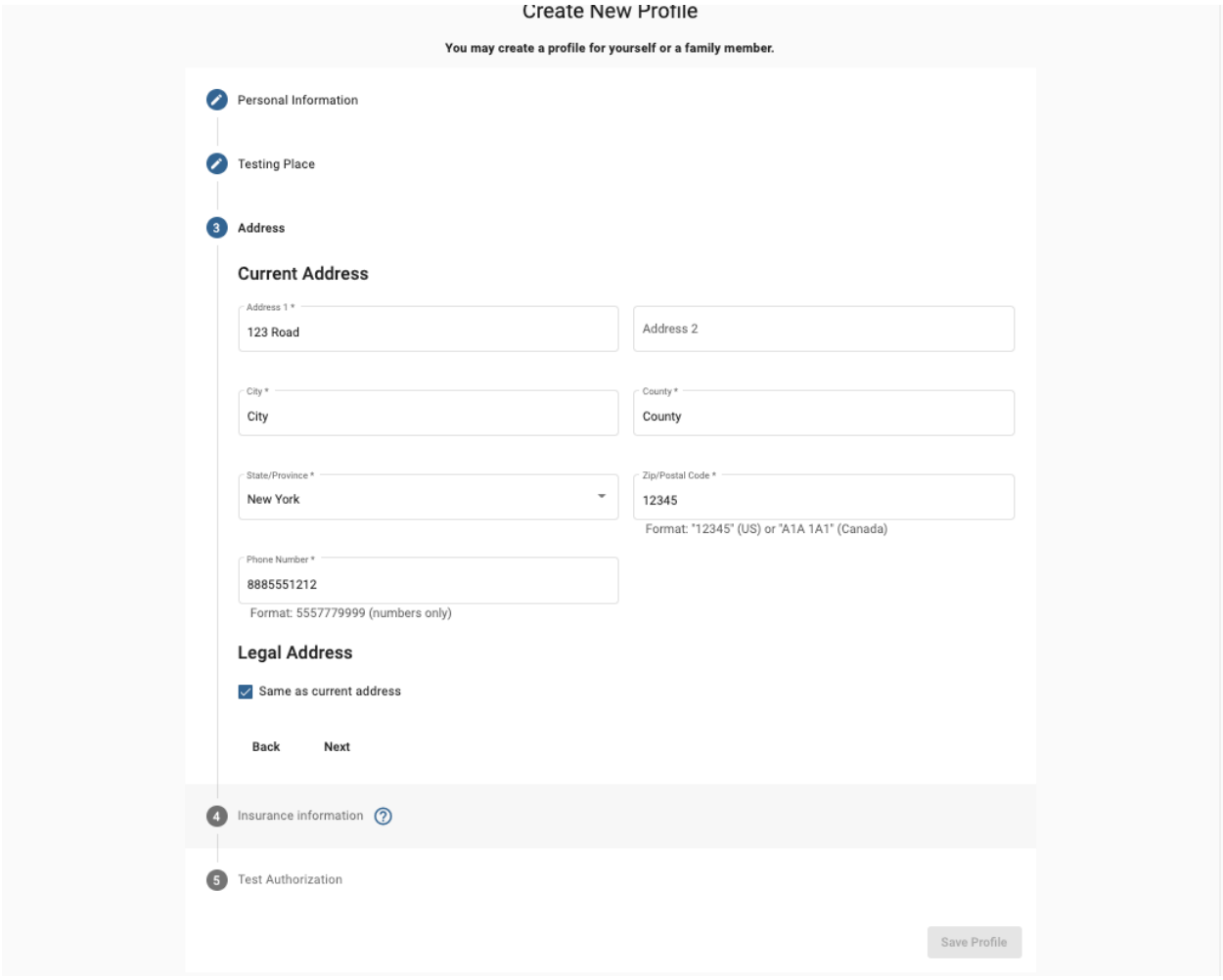
After selecting your organization from the list of organizations in the Other category you will then verify your choice by selecting the Verify button which will confirm your choice by highlighting it in green as shown below. If your organization is not listed and you are getting tested at a Community Testing Site, please select the Community Testing Site where you will be tested as your organization.



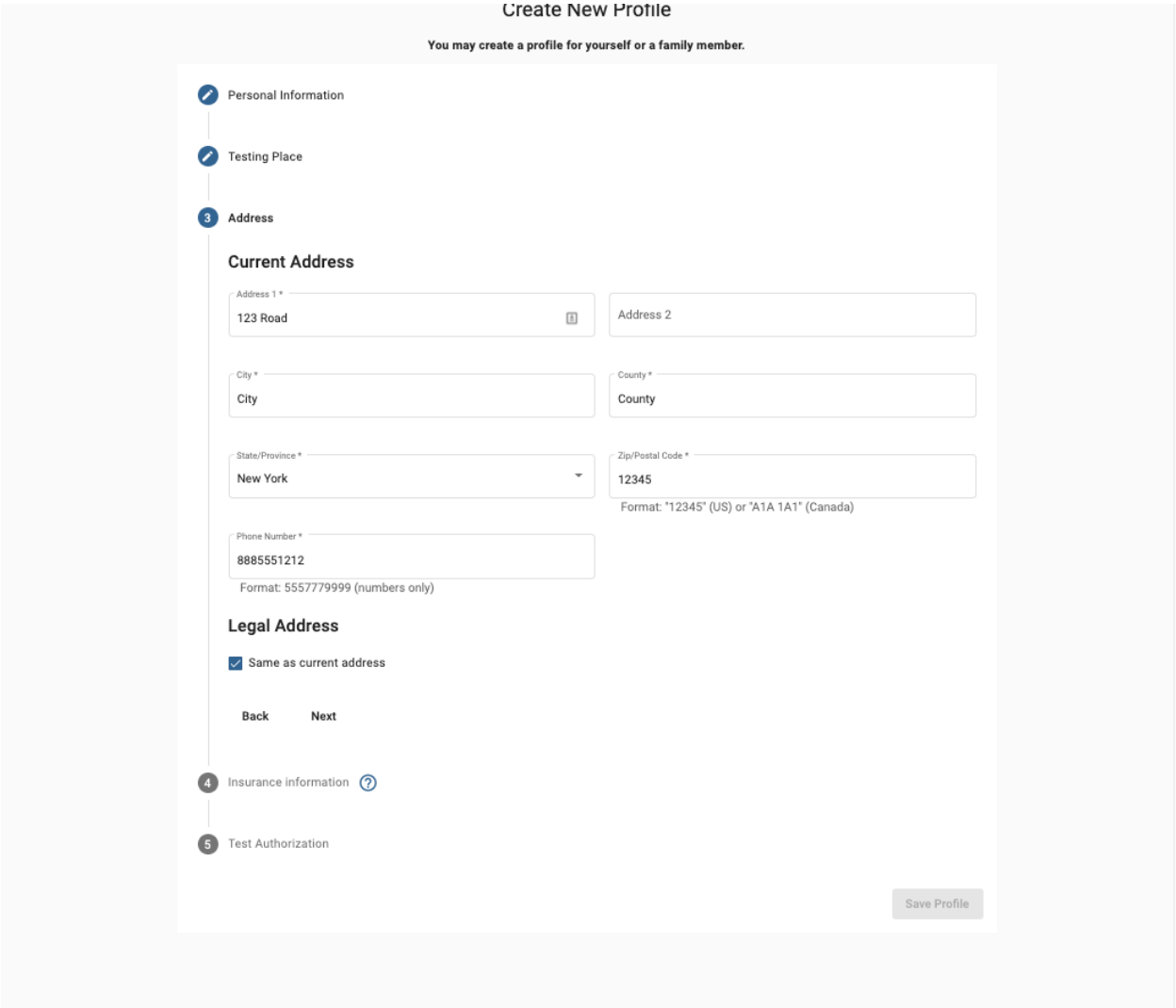
It is very important that you select the correct organization.

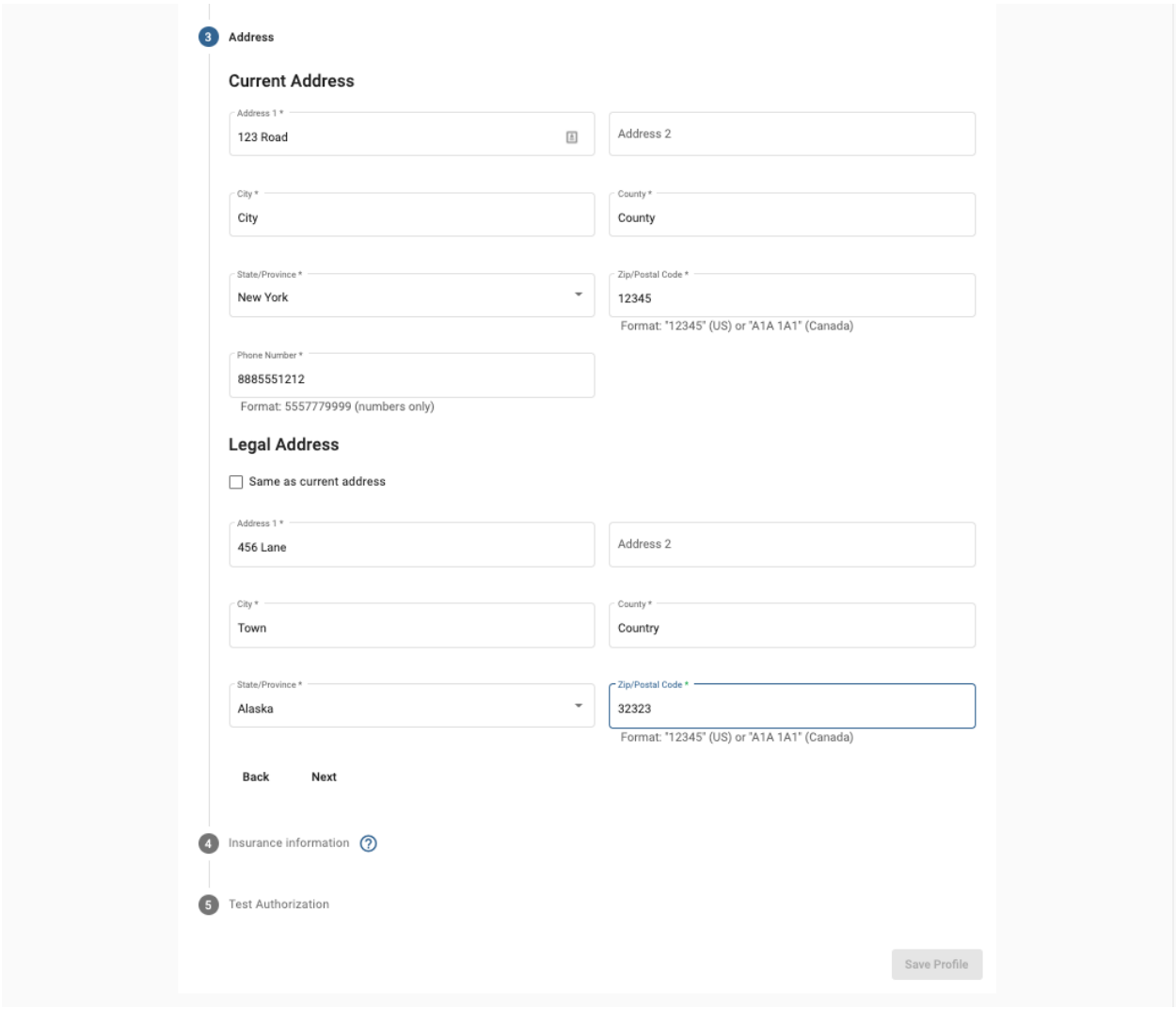
Current Address

Please click ***Next*** and fill out this profile's current address.



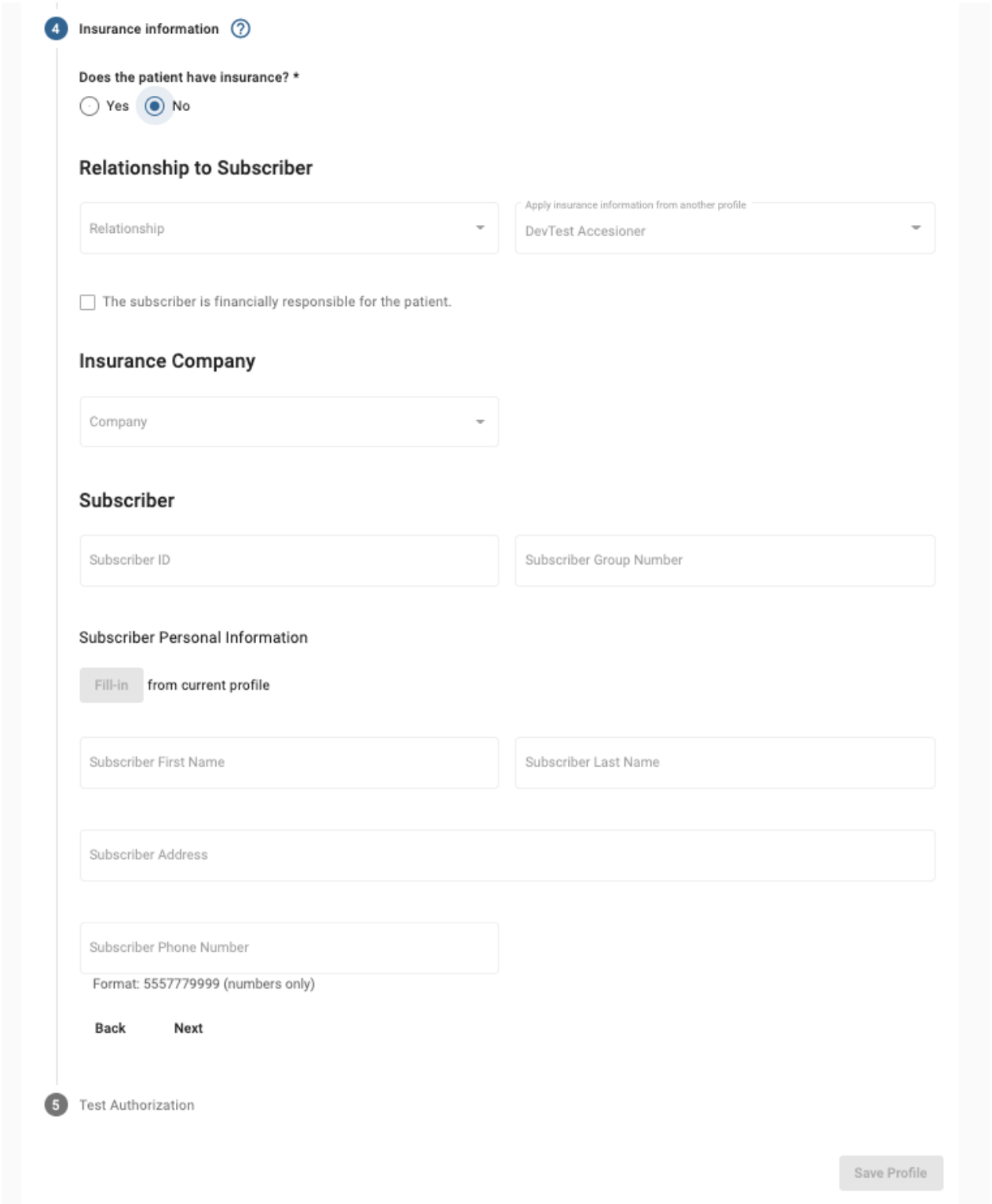
Please click ***Next*** and fill out this profile's legal address. You'll have the option here to click ***Same as current address*** if the profile's legal address is the same as the current address.


Create New Profile
You may create a profile for yourself or a family member.
Personal Information
Testing Place
3
Address
Current Address
Address 1 *
123 Road
Address 2
City *
City
County *
County
State/Province *
New York
Zip/Postal Code *
12345
Format: "12345" (US) or "A1A 1A1" (Canada)
Phone Number *
8885551212
Format: 5557779999 (numbers only)
Legal Address
Same as current address
Back
Next
4
Insurance information
5
Test Authorization
Save Profile


3 Address
Current Address
Address 1 *
123 Road
Address 2
City *
City
County *
County
State/Province *
New York
Zip/Postal Code *
12345
Format: "12345" (US) or "A1A 1A1" (Canada)
Phone Number *
8885551212
Format: 5557779999 (numbers only)
Legal Address
Same as current address
Address 1 *
456 Lane
Address 2
City *
Town
County *
Country
State/Province *
Alaska
Zip/Postal Code *
32323
Format: "12345" (US) or "A1A 1A1" (Canada)
Back
Next
4 Insurance information
5 Test Authorization
Save Profile

Insurance Information

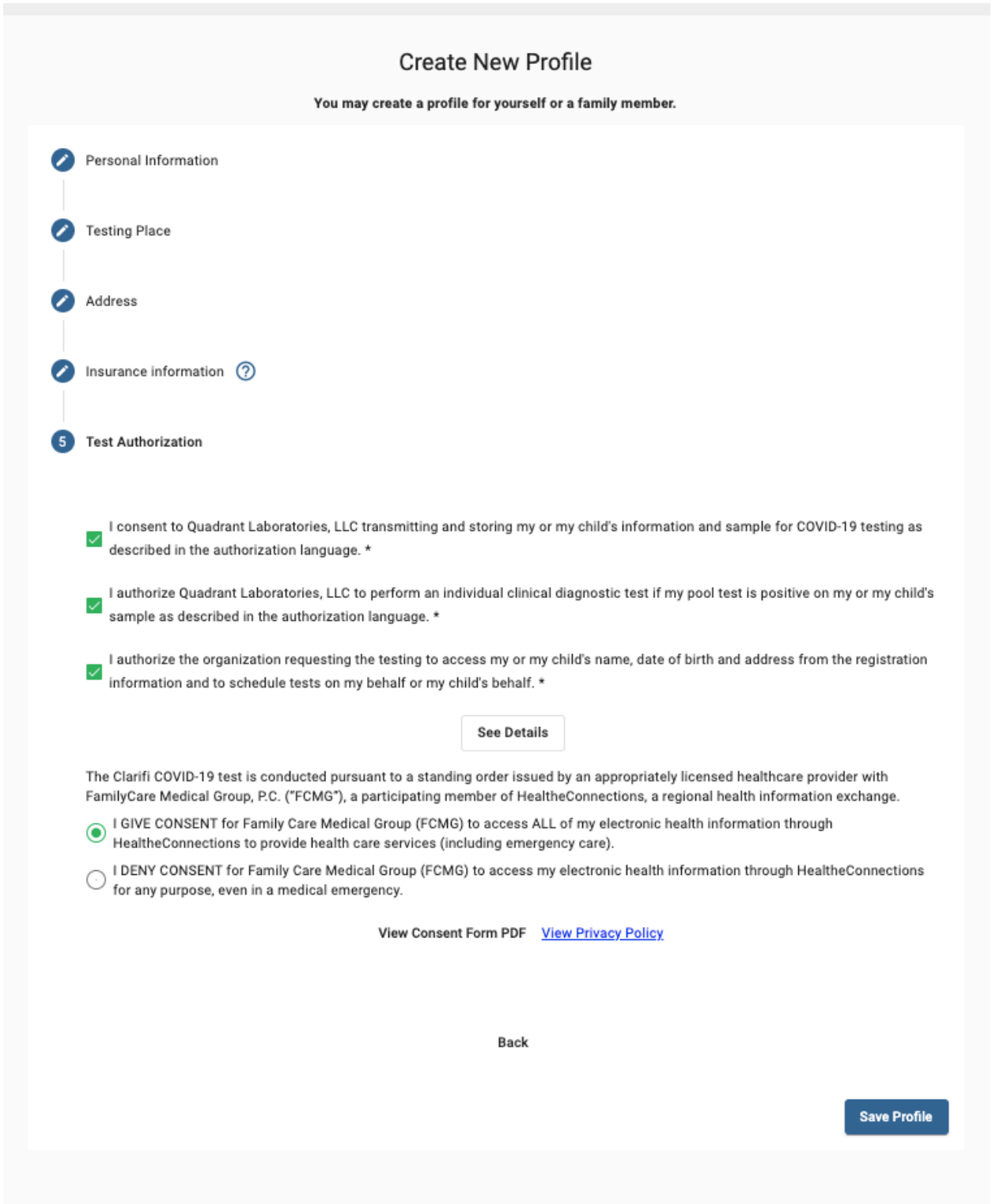
Please click ***Next*** and fill out this profile's insurance information.



There is an option here to click ***Fill-in from the current profile***, which will populate the subscriber fields with information that was entered in previous steps. Please note the required authorization clause and click ***Next*** if you agree to attest.

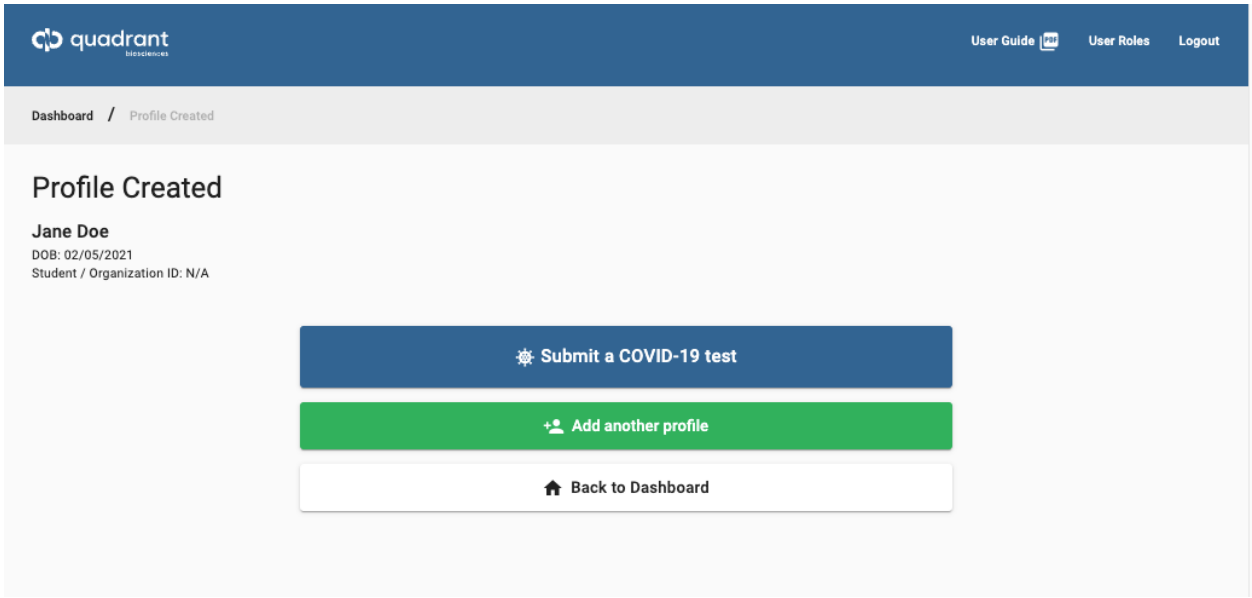
Test Authorization

Please review the test authorization language by clicking ***See Details***, then review the agreements described and click the corresponding checkboxes if you consent.



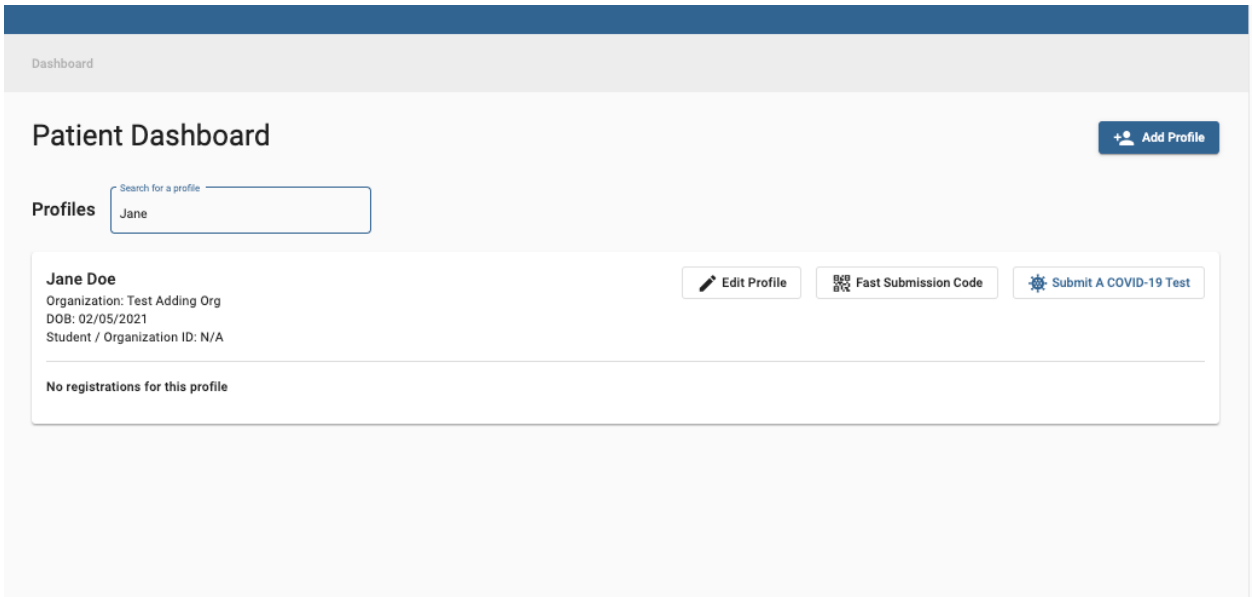
You have now completed your profile! You will now see a screen that gives you three options: ***Submit a COVID-19 test, Add another profile,*** and ***Back to Dashboard***. If you are a parent or

guardian wishing to add profiles for the children in your care, please click ***Add another profile***. If you have added all your profiles, and if you are in possession of a COVID-19 test kit, which includes a saliva swab, and are being guided by a qualified healthcare provider, you may click ***Submit a COVID-19 test.***



Edit Profile(s)

If changes are required for any of your personal information, you can edit your profile from the main landing page after logging in. Each profile for your account, as well as the tests registered to that profile will be visible on this page.



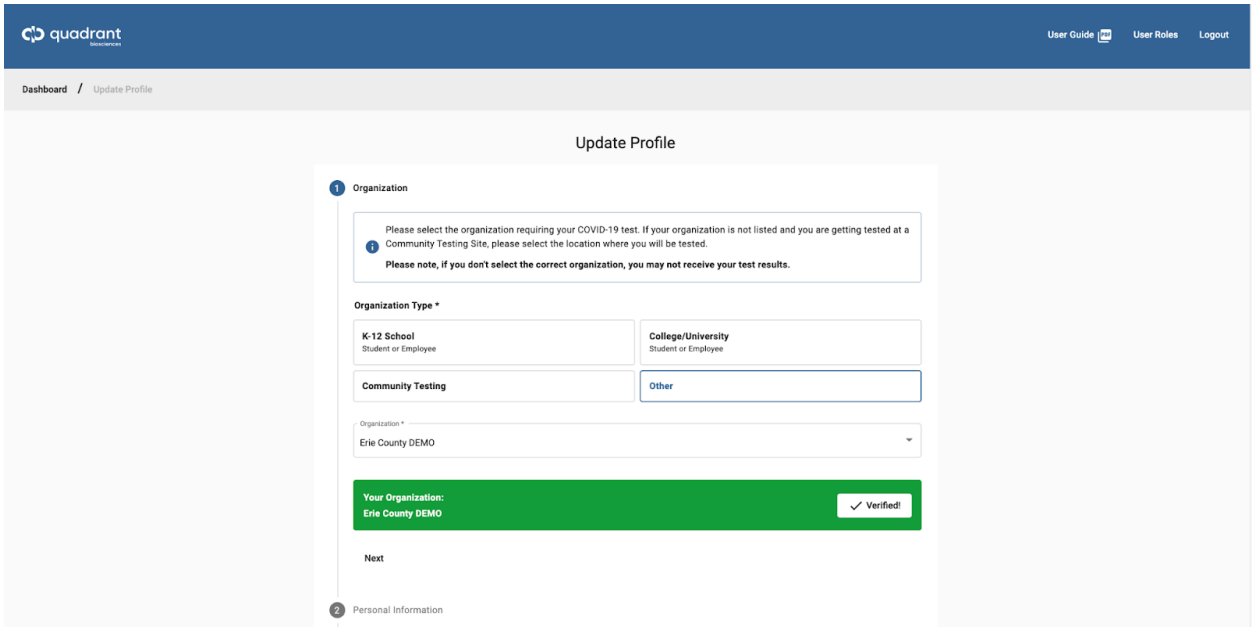
To edit any of the information in a profile, such as the organization or address, start by clicking on the Edit Profile button that corresponds to the profile you wish to edit. This will be to the right of, or below the name of the person that the profile belongs to. .

Navigate to the section that needs to be changed and make the edits. Any field highlighted in red needs to be addressed before the profile changes can be saved.

Note: Changes made to a profile are not saved until the **Save Profile** button is clicked**.**

Update Organization

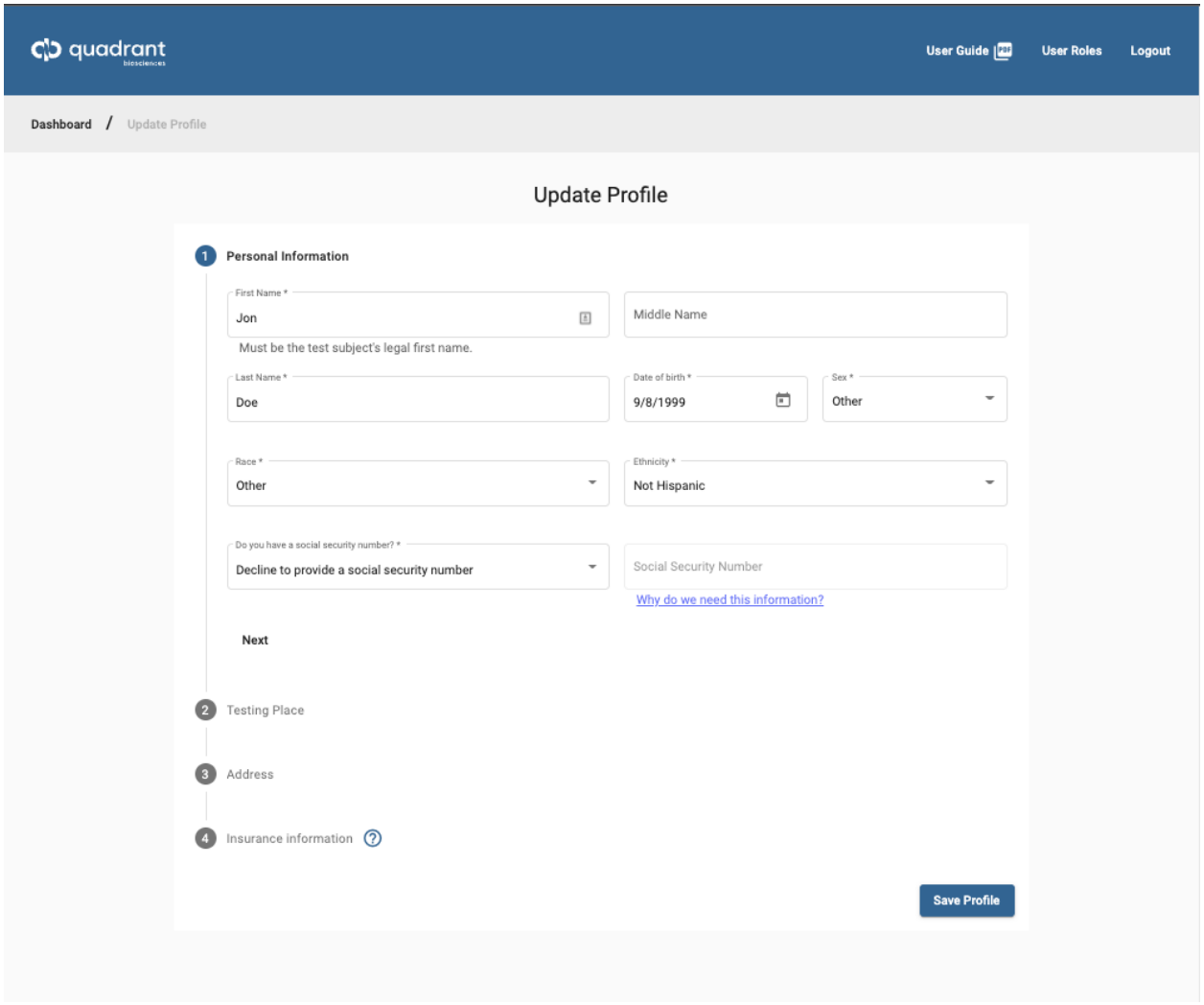
Start by confirming or changing the organization type and then by selecting your organization in the Organization drop down shown below. If a change is made then as described in detail in the section above using the:



Then confirm or change your organization by selecting the correct one from the appropriate dropdown. Verify your choice and select **Next** to confirm your choice.

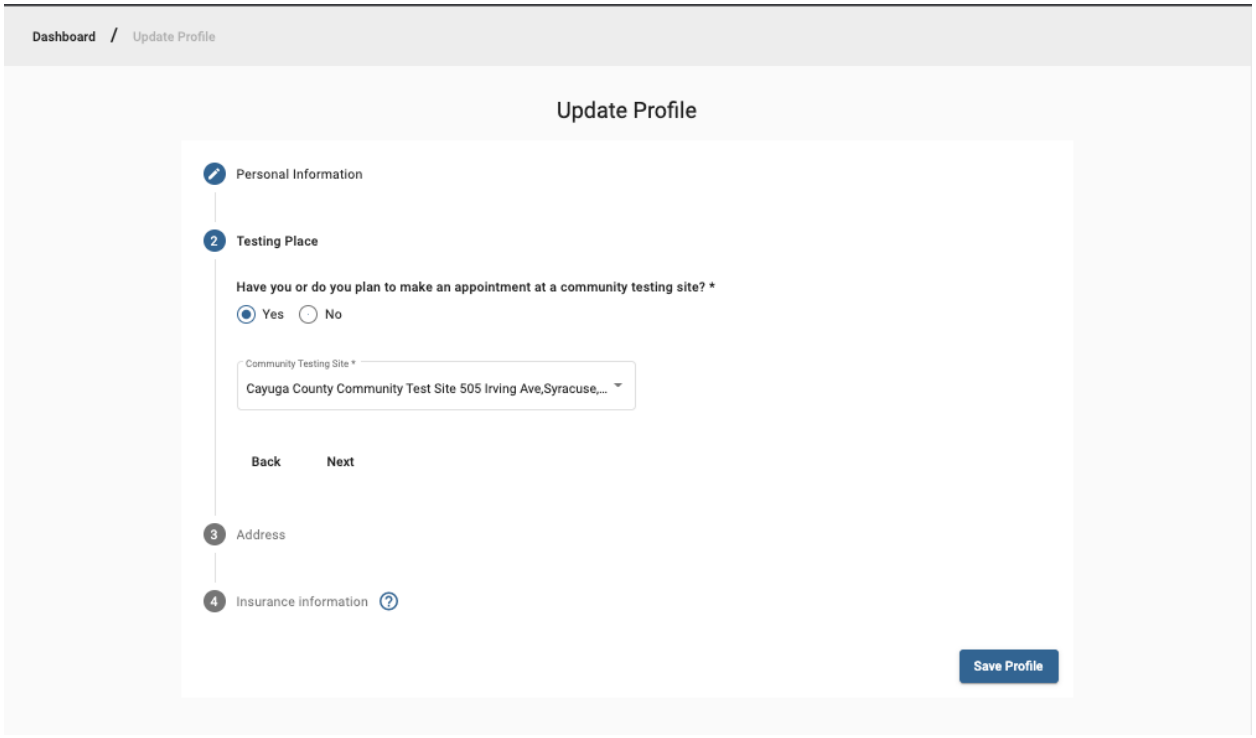
Update Personal Information

This section allows you to update your personal information. Your name should be your legal name not a nickname or pseudonym.



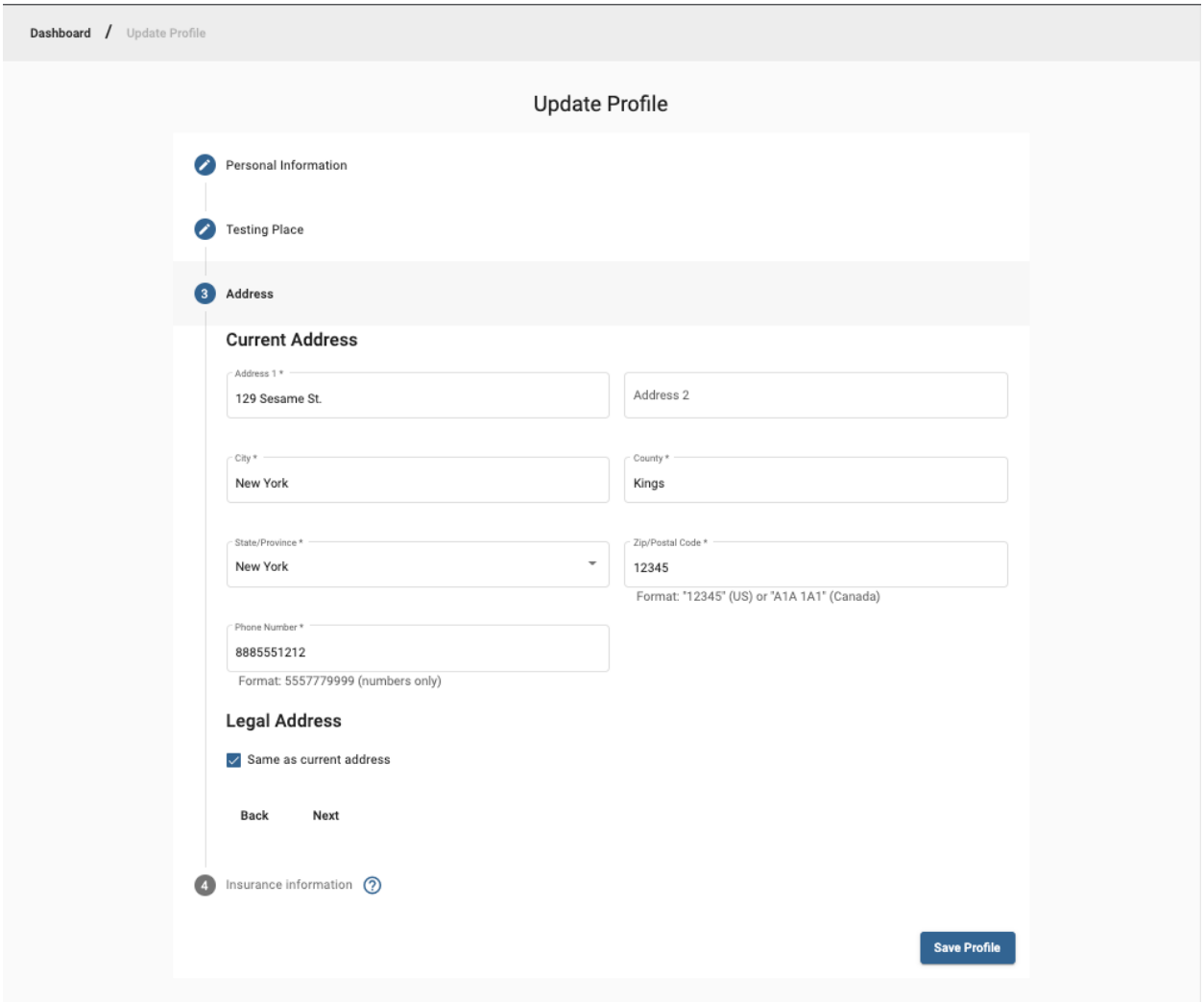
Update Testing Place

You have the option to update your testing place or organization in this section.



Update Current and/or Legal Address

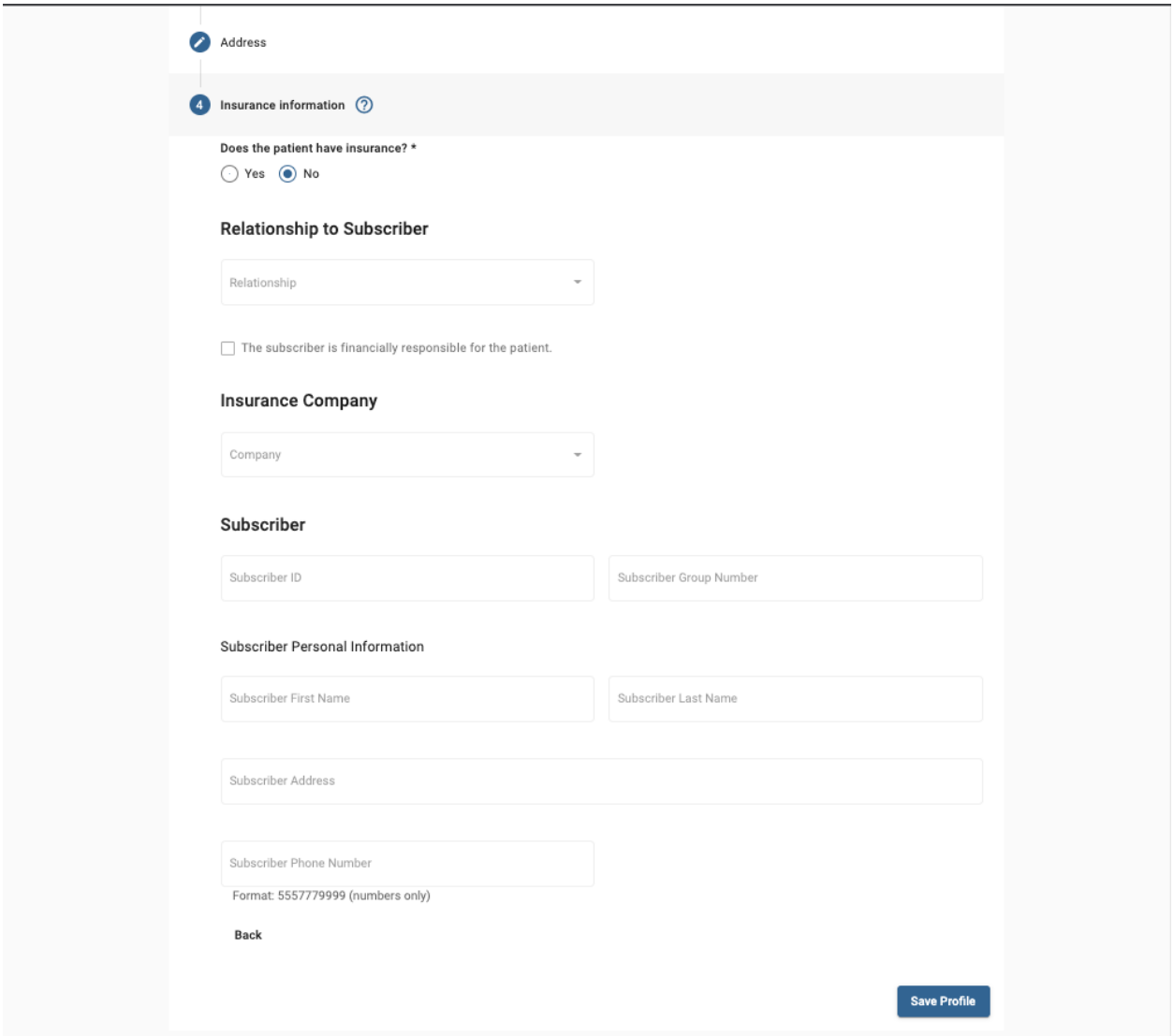
You can update or change your current and/or your legal address by editing the fields in this section. Once you've made the changes to your profile, you can click 'Save Profile' found in the bottom right hand side of the form to save your changes.



Once all required fields (identified by an asterisk) are filled in the form will allow confirmation by selecting **Next** or if you select **Back** you can return to the previous section.

Update Insurance Information

You can update or change your insurance information by editing the fields in this section.

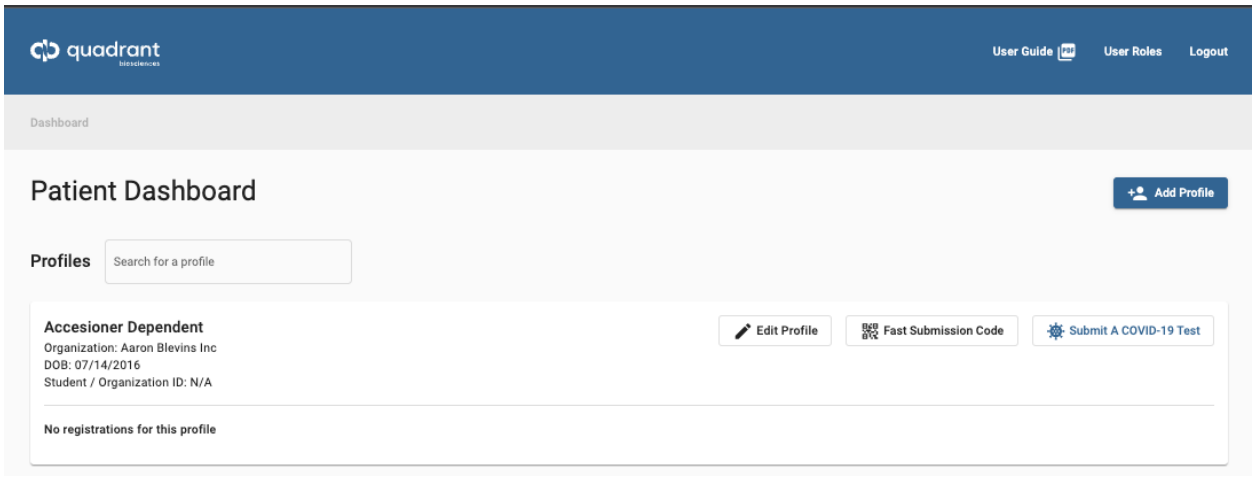


Once all required fields (identified by an asterisk) are filled in, the form will allow confirmation of **all changes made in all sections so far by selecting Save Profile** or if you select **Back** you can return to the previous section.

You will now be redirected to your dashboard with updated information displayed.

Fast Registration at a Community Test Site

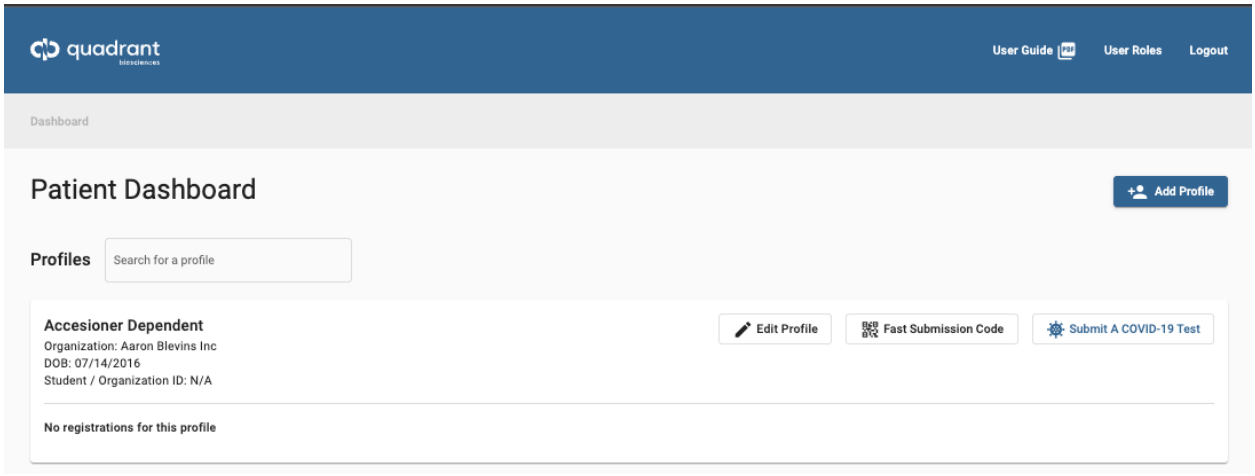
If you are being tested at a Quadrant Biosciences Community test site, you can click the Test Submission Code button that is next to the Edit Profile button on your dashboard.



A QR code, unique to your profile, will be revealed that the QB Test Registrant will scan to expedite the test submission process. Please ensure the brightness on your device is turned up to ensure accurate scanning.

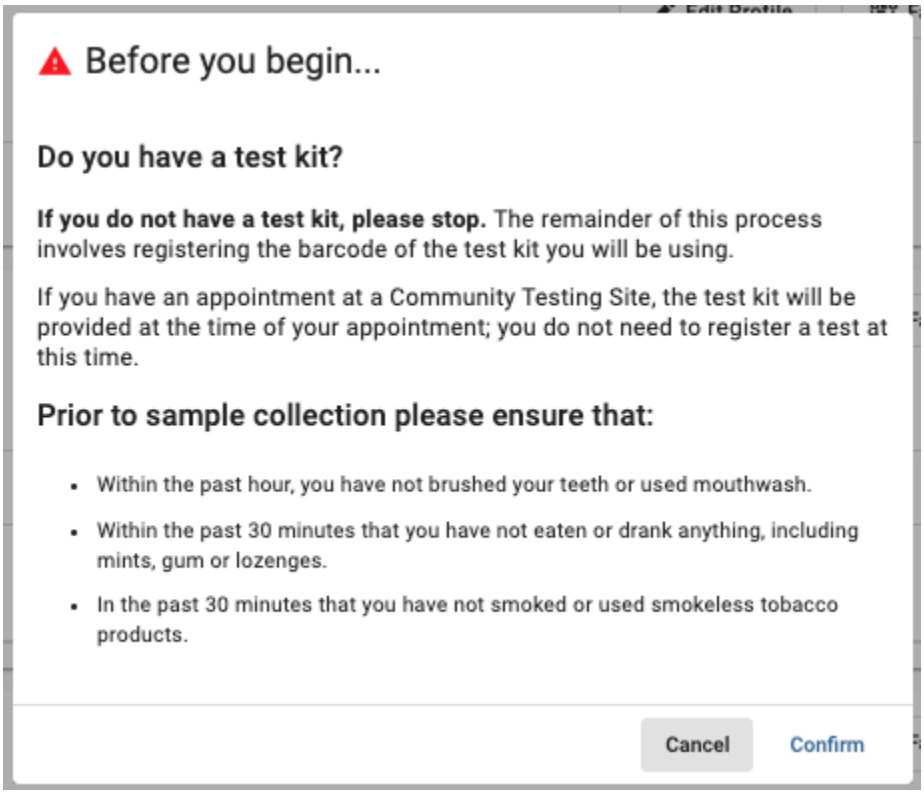
Submit a COVID-19 Test

If you have a test kit, you can submit your COVID-19 Test by clicking the Submit a COVID-19 Test button.



Do You Have a Test Kit?

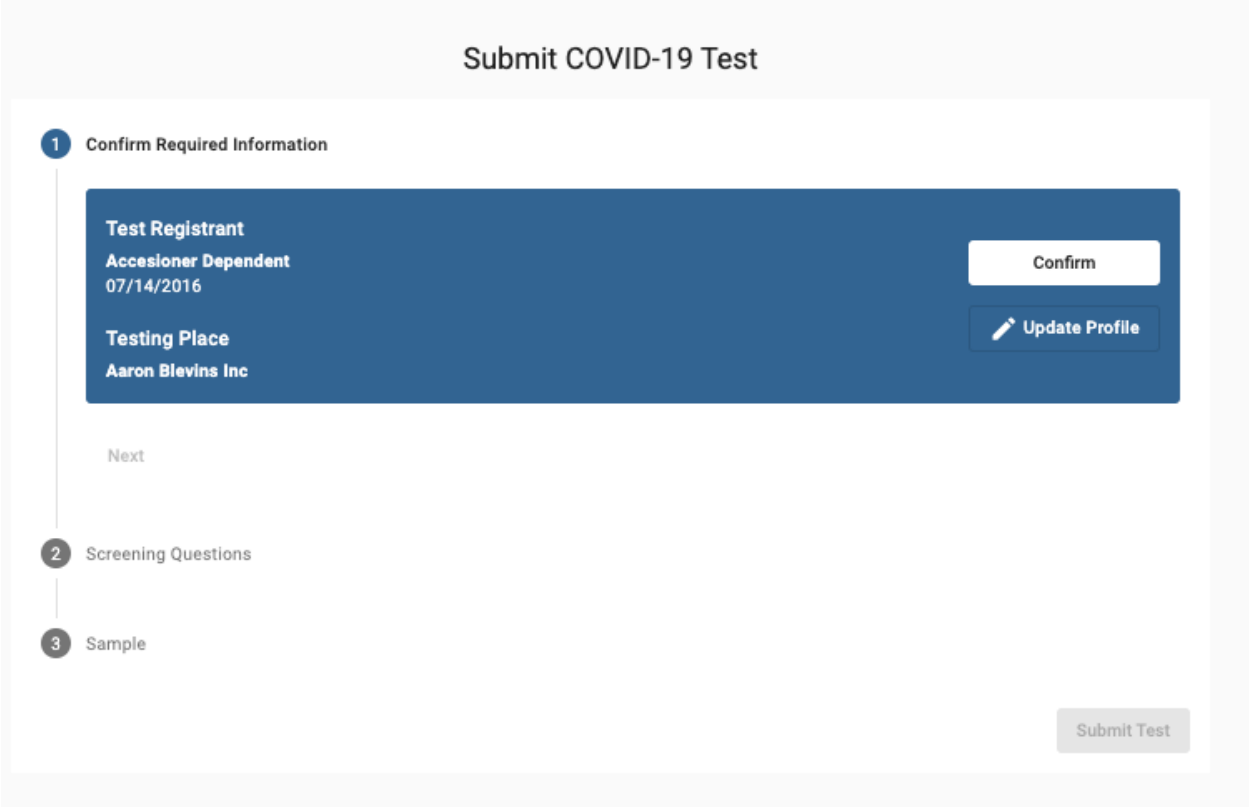
Before you register a test, you'll want to make sure you are in possession of a COVID-19 test kit.



If you are prepared to proceed, please click Confirm.

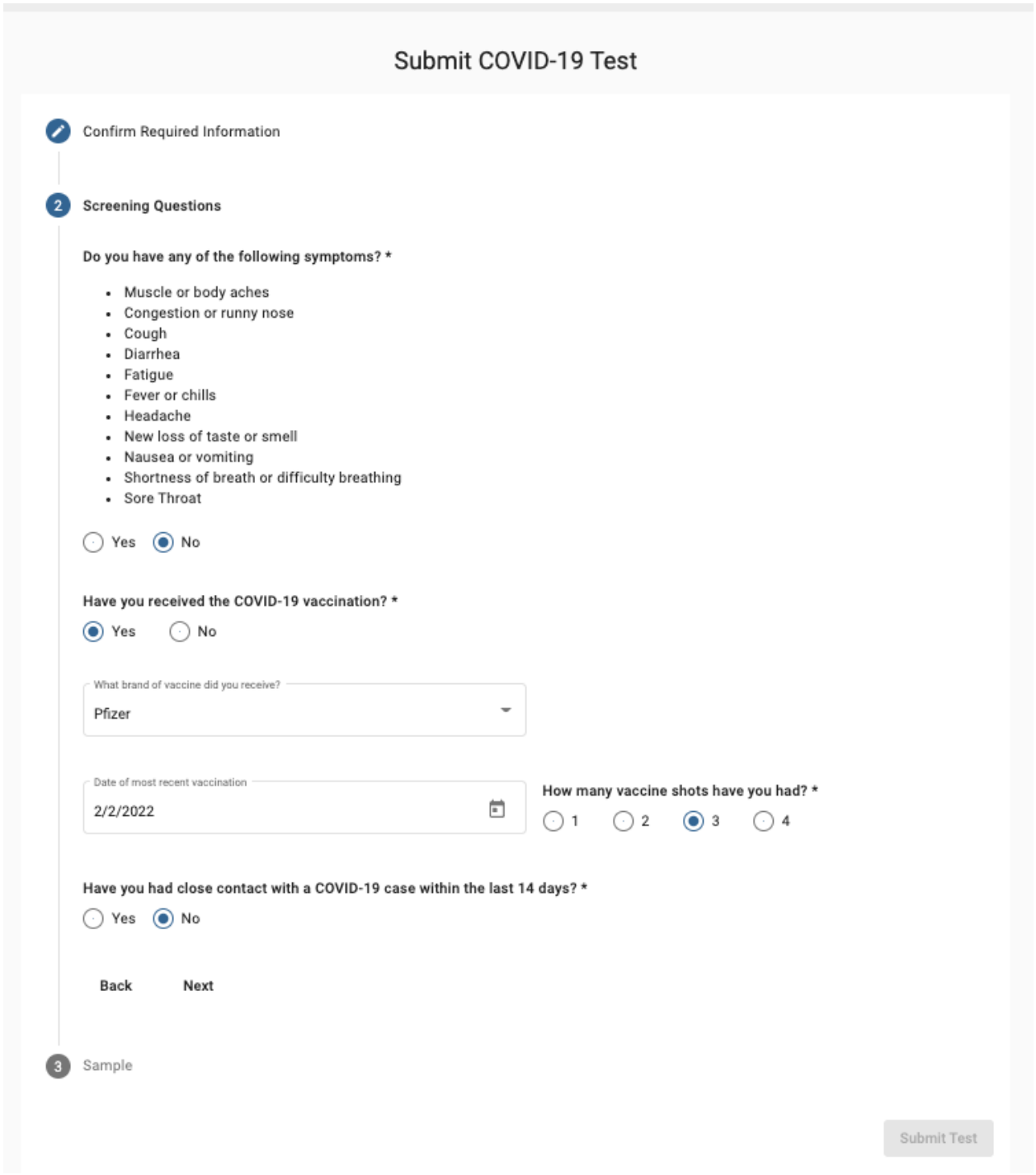
Confirm Required Information

Please confirm the Test Registrant and Testing Place information. If anything needs to be updated, click Update Profile and you will be redirected the the Update Profile form. Otherwise, click Confirm to proceed.



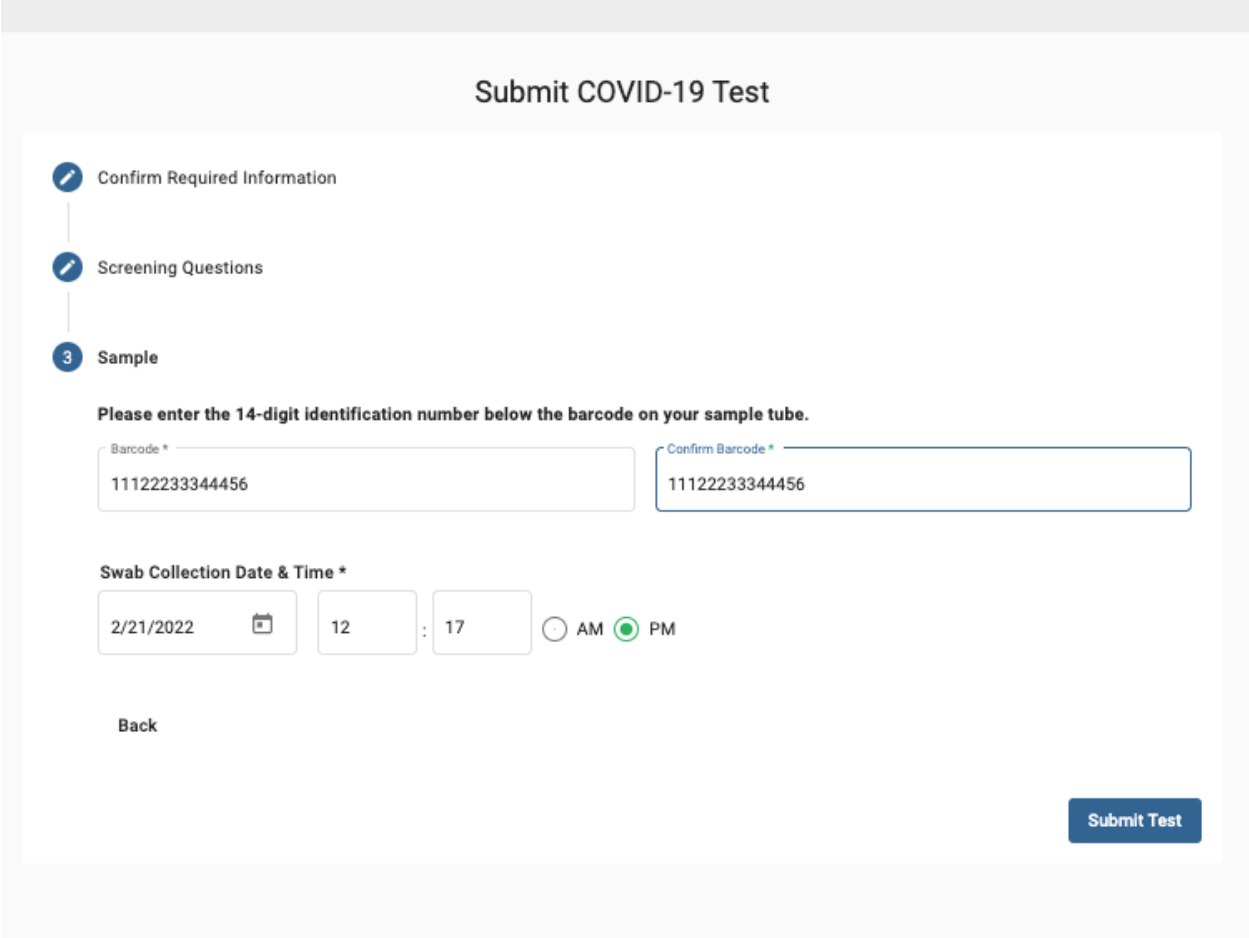
Screening Questions

Please answer the screening questions, then click ***Next.***


Submit COVID-19 Test
Confirm Required Information
2
Screening Questions
Do you have any of the following symptoms? *
Muscle or body aches
Congestion or runny nose
Cough
Diarrhea
Fatigue
Fever or chills
Headache
New loss of taste or smell
Nausea or vomiting
Shortness of breath or difficulty breathing
Sore Throat
Yes
No
Have you received the COVID-19 vaccination? *
Yes
No
What brand of vaccine did you receive?
Pfizer
Date of most recent vaccination
2/2/2022
How many vaccine shots have you had? *
1
2
3
4
Have you had close contact with a COVID-19 case within the last 14 days? *
Yes
No
Back
Next
3
Sample
Submit Test

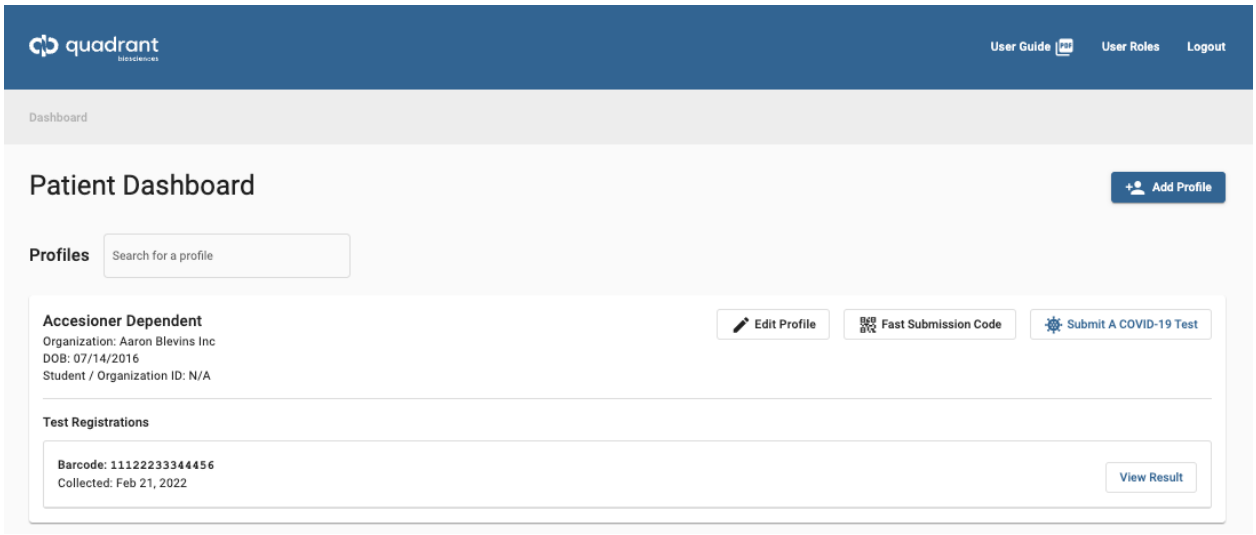
Sample Collection

Please work with your qualified healthcare provider to collect a saliva sample, and enter the barcode twice. Please pay careful attention to the barcode that you enter here. It is very important that you enter the barcode accurately.



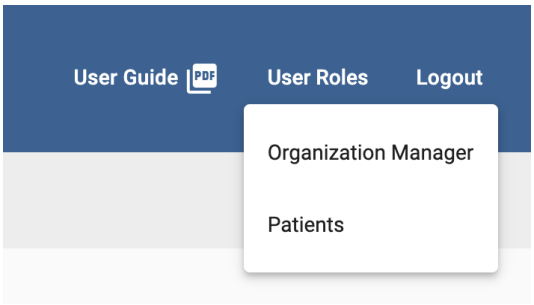
Please confirm that you have entered the barcode correctly. It is very important that you enter the barcode accurately. Once you have verified, please click ***Submit Test***.

You have successfully added a COVID-19 test! You will be directed back to the dashboard where you'll see each of your profiles and the tests that they have registered.



Organization Managers

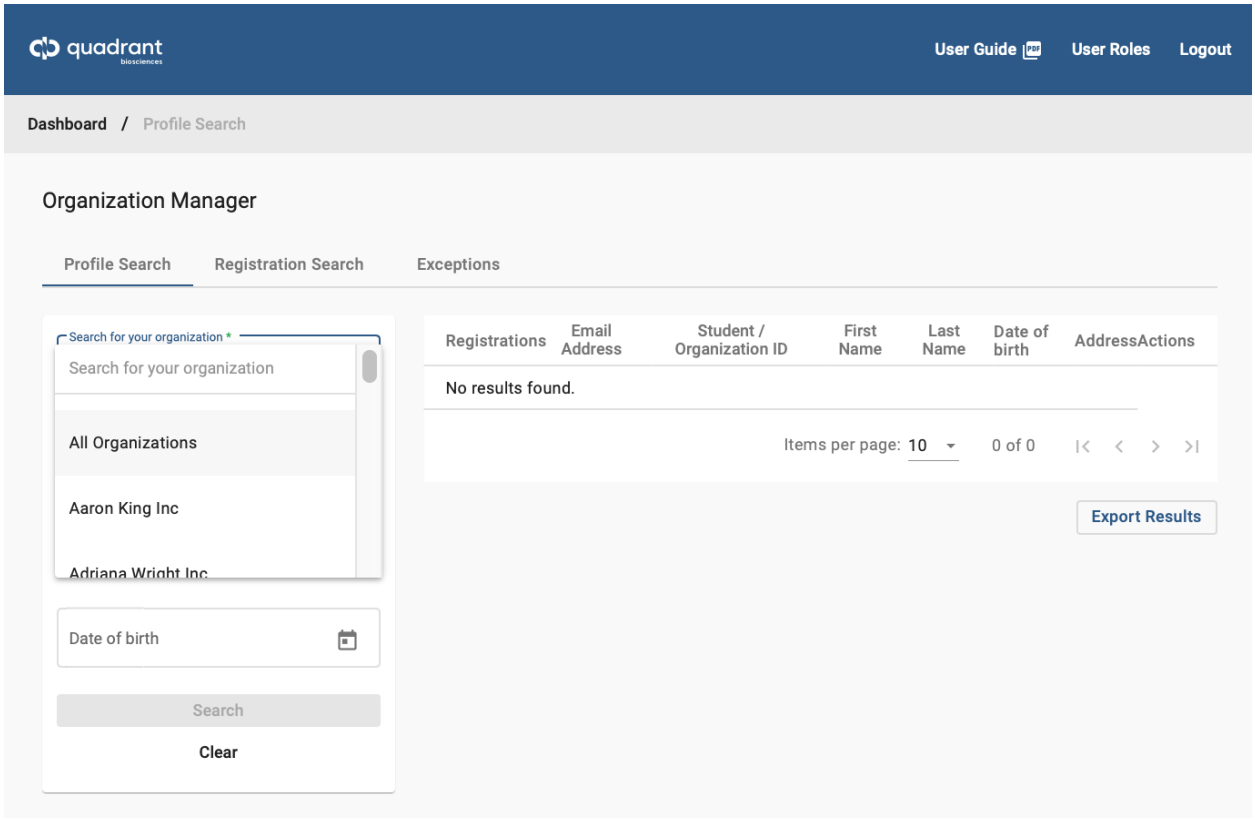
For personnel (such as school nurses, physicians, or site administrators) authorized by an organization, the ability to search and add tests for patients within the organization is offered. If you are an authorized organization manager, you'll see an additional item in the ***User Roles*** menu in the top right corner of the web site labeled as "Organization Manager":



Please select ***Organization Manager*** to be directed to this feature. There are two search options available once the Organization Manager role has been assumed. You can select the "Profile Search" tab or the "Registration Search" tab and use the available fields as search filters applied to your organization's records.

Profile Search

On the profile search page, you see four fields with which to find profiles: organization, first name, last name, and date of birth.

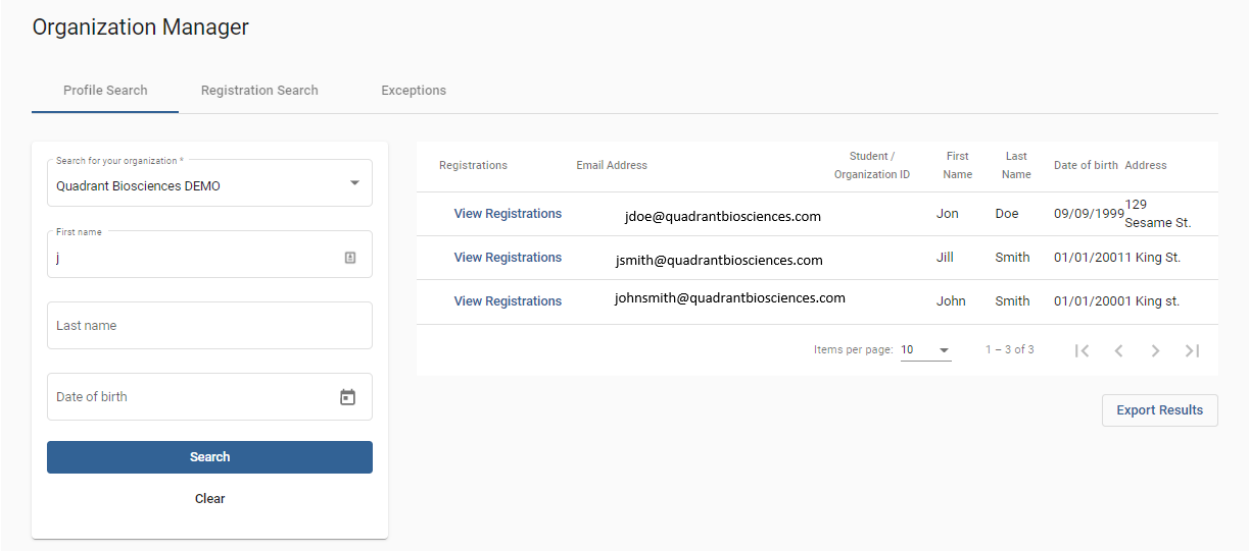


Search Fields

The dropdown list containing organizations is limited to those you are authorized to search. You can enter part or all of the first and/or last name and results matching the values entered will be displayed on the right side of the page. If you select the org and select search all records in the org will be displayed and can be exported to a comma separated format by selecting the “Export Results” button.

Search Results

In the search results you’ll find the search fields, as well as the street address of the matching record.

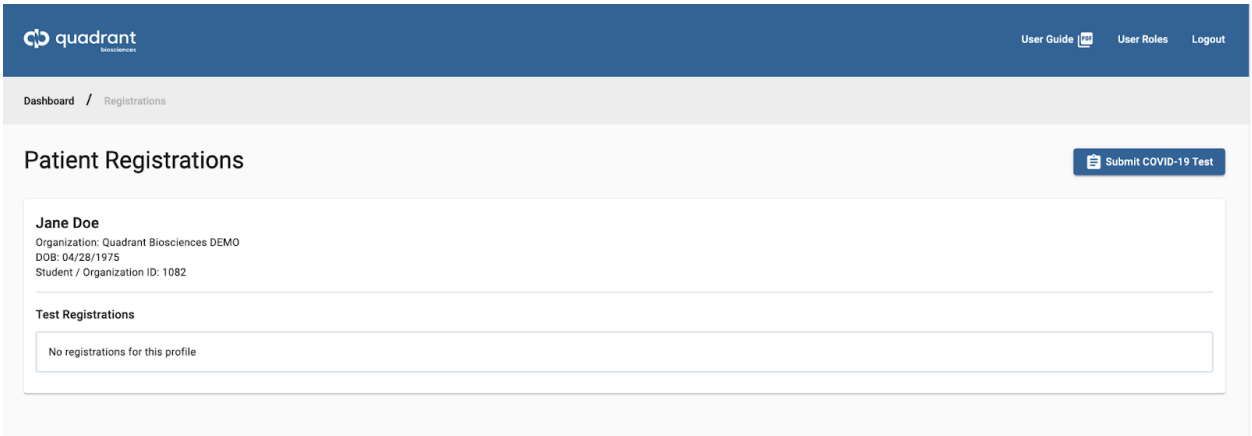


Clicking the “Export Results” option will make all the results of the search available in a comma separated value text file that is downloaded for your use locally.

An example of the file format is shown below:

```
id,studentId,firstName,lastName,dob,address
"57649f70-173a-4f93-88ec-4244aabf99d6",null,"Jon","Doe","03/04/2003","Test123"
"931543a5-a8e8-4482-a261-7734417cb112",null,"Johntest","Doe","03/02/1998","4 Privet Drive"
"b31d62fe-dffb-41bf-9a16-8dbb14c0d005",null,"John","Doe","09/09/1999","129 Sesame St"
```

To view registrations for a matching profile, please click ***View Registrations***.



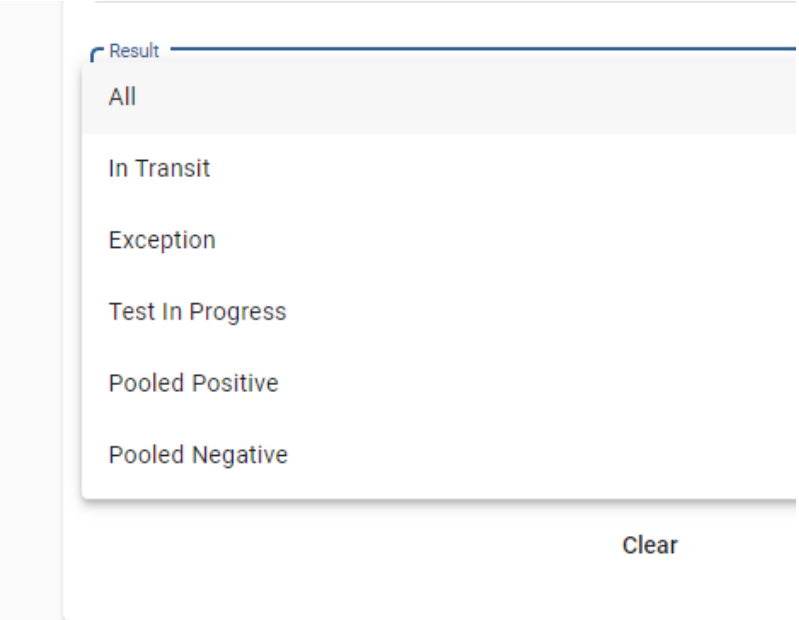
If you wish, you may add a COVID-19 test on behalf of the person by clicking ***Register COVID-19 test***. This will lead you through a process similar to the workflow described in the **Add COVID-19 Test** section of this document.

Registration Search

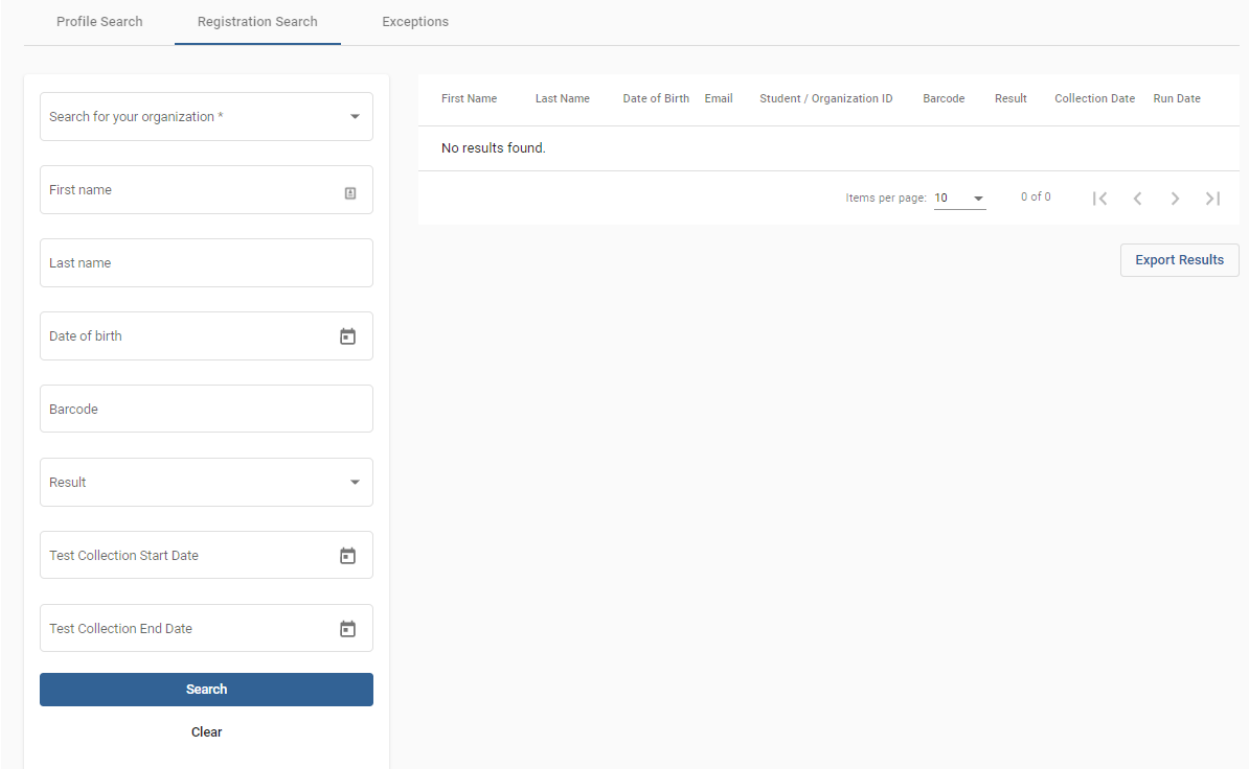
On the registration search page, you see eight fields with which you can locate specific registrations, find test results and export search results. The fields available to be searched include: first name, last name, date of birth, barcode, a test result filter, test start date, and a test end date.

The test result filter for Organization Managers now includes the following options:

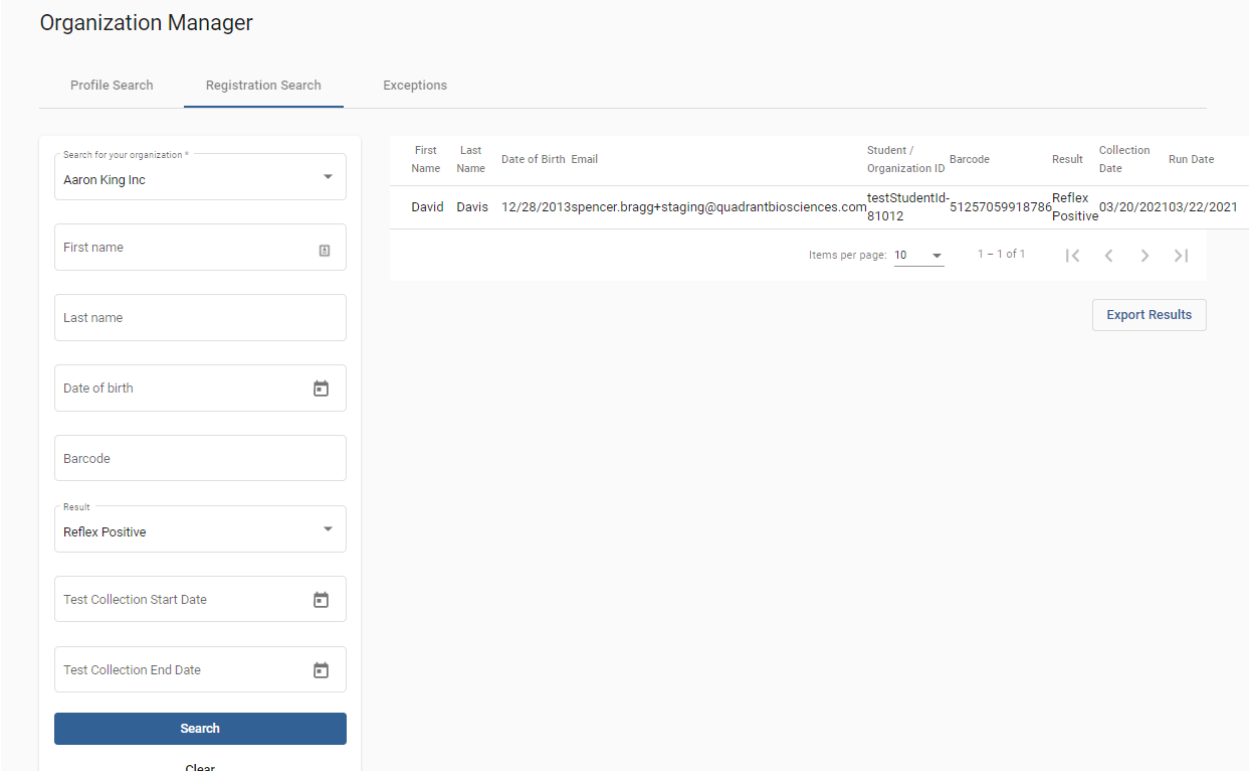
- In Transit (Not yet accessioned into the lab)
- Exception (Patient Profile information does not match sample information)
- Test in Progress (Successfully accessioned into the lab)
- Pooled Positive (Pooled test with positive outcome)
- Pooled Negative (Pooled test with negative outcome)
- Reflex Positive (Single sample test with positive outcome)
- Reflex Negative (Single sample test with negative outcome)
- Test Canceled (Collection Date of sample is greater than 6 days old)



Any conditions that are set are combined and act as a combined search filter applied to your organization's data and any results are displayed when you select search.

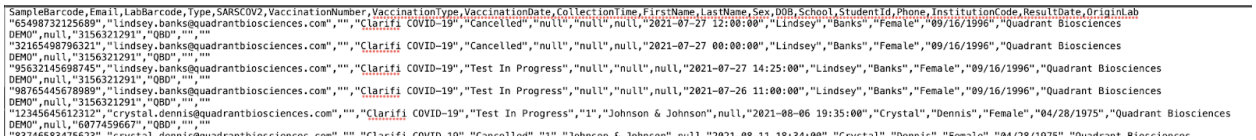


An example of a simple search based on a positive result filter is shown below.



Clicking the “Export Results” option will make all the results of the search available in a comma separated text file that is downloaded for your use locally.

An example of the file format is shown below:



```
SampleBarcode,Email,LabBarcode,Type,SARSCOV2,VaccinationNumber,VaccinationType,VaccinationDate,CollectionTime,FirstName,LastName,Sex,DOB,School,StudentId,Phone,InstitutionCode,ResultDate,OriginLab
"65498732125689","lindsey.banks@quadrantbiosciences.com","","Clarifi COVID-19","Cancelled","null","null",null,"2021-07-27 12:00:00","Lindsey","Banks","Female","09/16/1996","Quadrant Biosciences
DEMO",null,"3156321291","QBD","",""
"32165498796321","lindsey.banks@quadrantbiosciences.com","","Clarifi COVID-19","Cancelled","null","null",null,"2021-07-27 00:00:00","Lindsey","Banks","Female","09/16/1996","Quadrant Biosciences
DEMO",null,"3156321291","QBD","",""
"95632145698745","lindsey.banks@quadrantbiosciences.com","","Clarifi COVID-19","Test In Progress","null","null",null,"2021-07-27 14:25:00","Lindsey","Banks","Female","09/16/1996","Quadrant Biosciences
DEMO",null,"3156321291","QBD","",""
"98765445678989","lindsey.banks@quadrantbiosciences.com","","Clarifi COVID-19","Test In Progress","null","null",null,"2021-07-26 11:00:00","Lindsey","Banks","Female","09/16/1996","Quadrant Biosciences
DEMO",null,"3156321291","QBD","",""
"12345645612312","crystal.dennis@quadrantbiosciences.com","","Clarifi COVID-19","Test In Progress","1","Johnson & Johnson",null,"2021-08-06 19:35:00","Crystal","Dennis","Female","04/28/1975","Quadrant Biosciences
DEMO",null,"6077459667","QBD","",""
"93746589476523","crystal.dennis@quadrantbiosciences.com","","Clarifi COVID-19","Cancelled","1","Johnson & Johnson",null,"2021-08-11 18:34:00","Crystal","Dennis","Female","04/28/1975","Quadrant Biosciences
```

Sample Exceptions

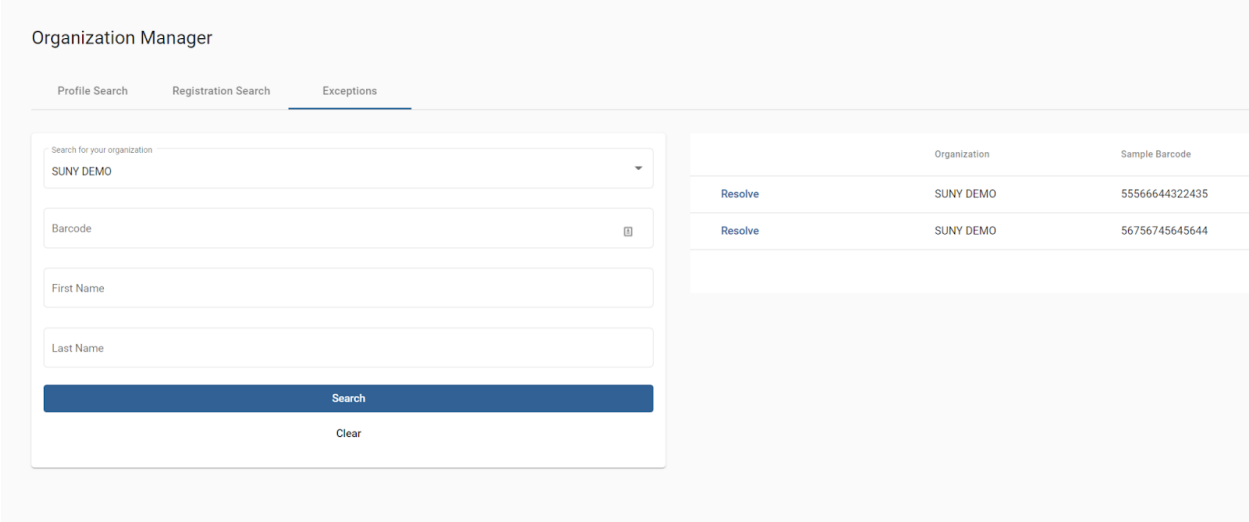
There are several aspects of the test registration process and testing that must be completed accurately to avoid a sample being held out of processing as an exception. Results will be delayed for all samples marked as an exception. Necessary steps are legally required by the laboratory to correct for each invalid aspect of a sample before it can be processed.

For **each sample** marked as an exception, Quadrant Biosciences staff will contact your organization via email to correct one or more of the problems noted below and sign a specimen correct form as the responsible party making these changes.

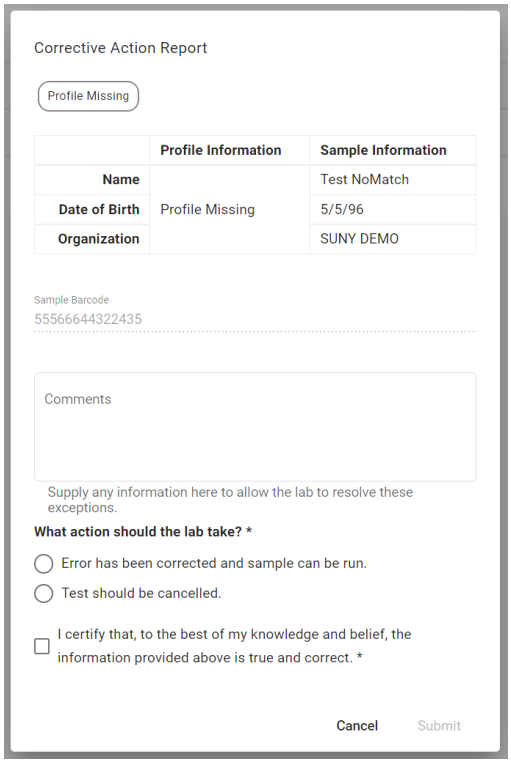
- The person registered must choose their correct **organization** for organizational managers to successfully view results.
- **Name and Date of Birth** (DOB) on the sample must match the Name and DOB listed within the web app exactly (e.g., the person cannot be registered as Bob in the app and write Robert on the tube). It is strongly recommended that labels are printed prior to testing to write on and affix to the saliva collection kit or preprint with Name and DOB for each person being tested.
- The **barcode** on the tube must match the barcode typed or scanned into the web app (e.g., if the barcode is off by 1 number, the sample will be held out as an exception).
- If a test is being added to the web app on a phone or computer, the **submit button** must be clicked for the sample to be processed in the lab.
- The person being tested must have their accurate **permanent and legal address** entered in their profile on the web app. All results are now considered a diagnostic test and as such must be reported to NYSDOH.
- Unregistered samples will not be processed. All samples must be registered in the web app before they are returned to the lab.

Correcting Exceptions

When samples are withheld as exceptions, Organization Managers will be notified via email advising them of the errors and the option to correct or cancel the test and recollect a sample.



1) Log into the Organization Manager Dashboard of app.clarifi-covid-19.com.
2) Select the 'Exception' tab (see image above).
3) Select your organization and click 'Search'.
4) All current Exceptions will be listed for your organization.
5) Click 'resolve' next to the patient name (See image to right).
6) The Organization Manager needs to correct the listed exceptions.
7) If the Organization Manager is able to correct the exception, provide details of the corrections made in the comment box.
8) Select 'What action should the lab take?'
    a) Error has been corrected and sample can be run.
    b) Test should be canceled.
9) Confirm correction by checking off the certification statement.
10) Click Submit.

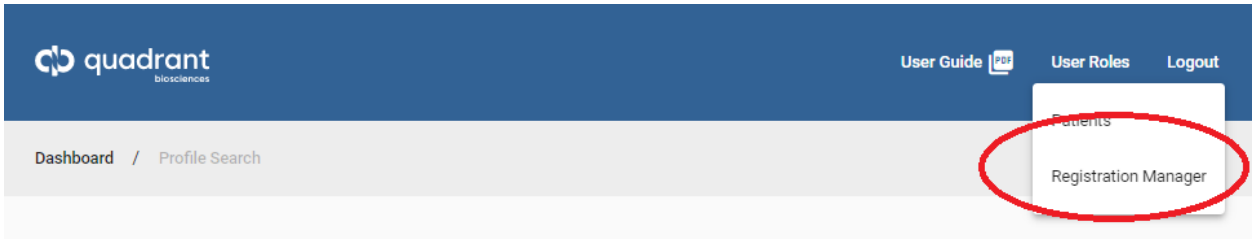


Notes: (1) Samples that are labeled as exceptions due to low-fluid or are expired cannot be rerun. Sample recollection will be required. (2) Automated emails will be sent every hour.

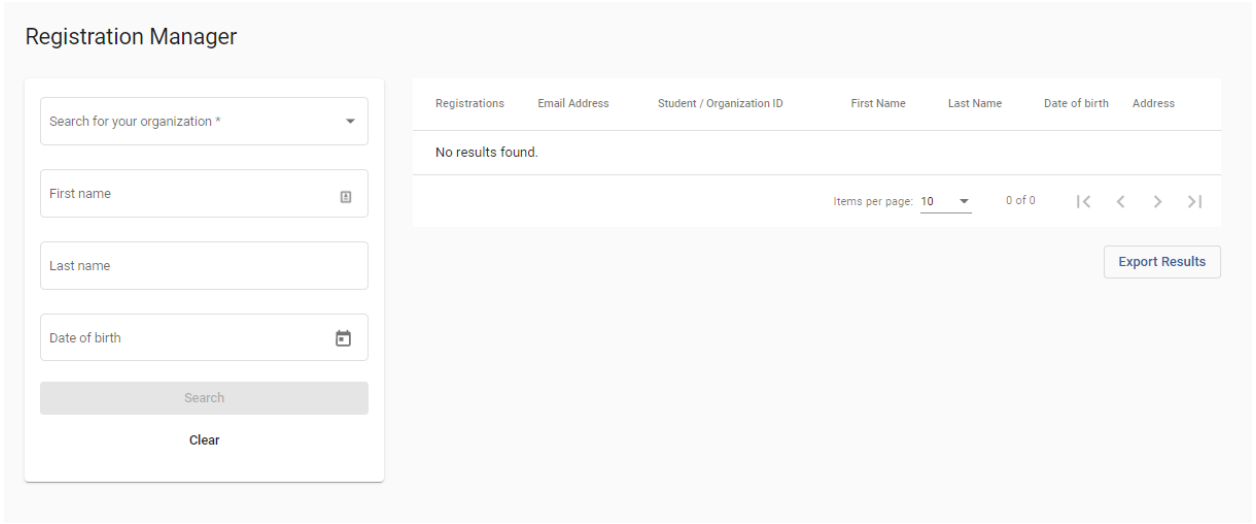
Registration Managers

For personnel (such as school nurses, physicians, or site administrators) authorized by an organization, the ability to search and confirm a test registration and to add tests for patients within the organization is offered. If you are an authorized registration manager, you'll have the ability to search for registered users and see registered tests using an interface that is equivalent to the Profile search described in the preceding section. Registration Managers will not be able to see the final test results (i.e. COVID negative or positive) for the patients within the organization.

In order to access the Registration Manager function the user will select Registration Manager from the User Role menu as shown below:



The screen titled **Registration Manager** will be presented, as shown below.

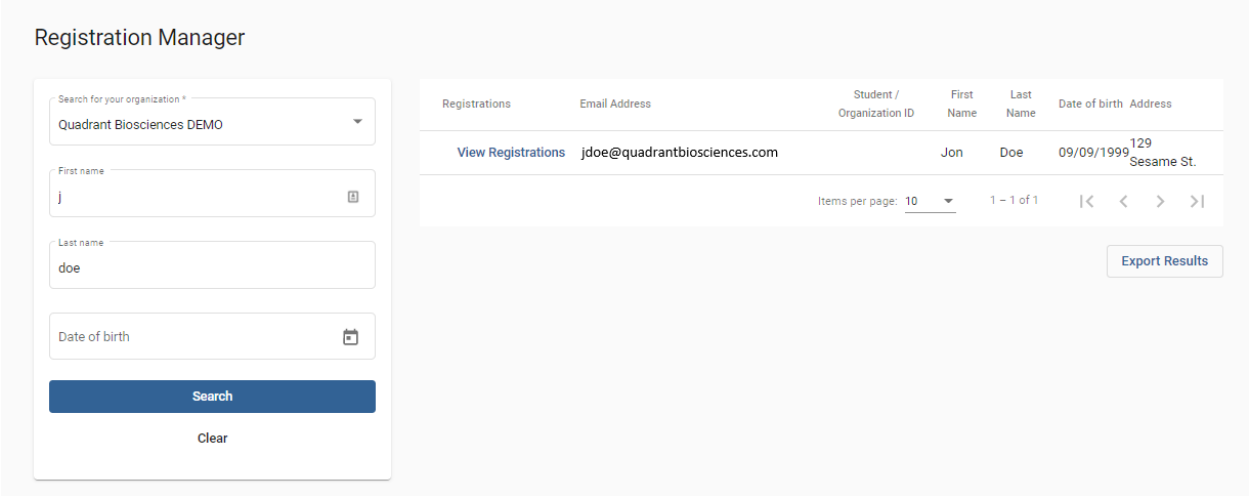


Search Fields

The dropdown list containing organizations is limited to those you are authorized to search. You can enter part or all of the first and/or last name and results matching the values entered will be displayed on the right side of the page. If you select the org and select search all records in the org will be displayed and can be exported to a comma separated format by selecting the "Export Results" button.

Search Results

In the search results you'll find the search fields, as well as the student/organization ID and the street address of the matching record.

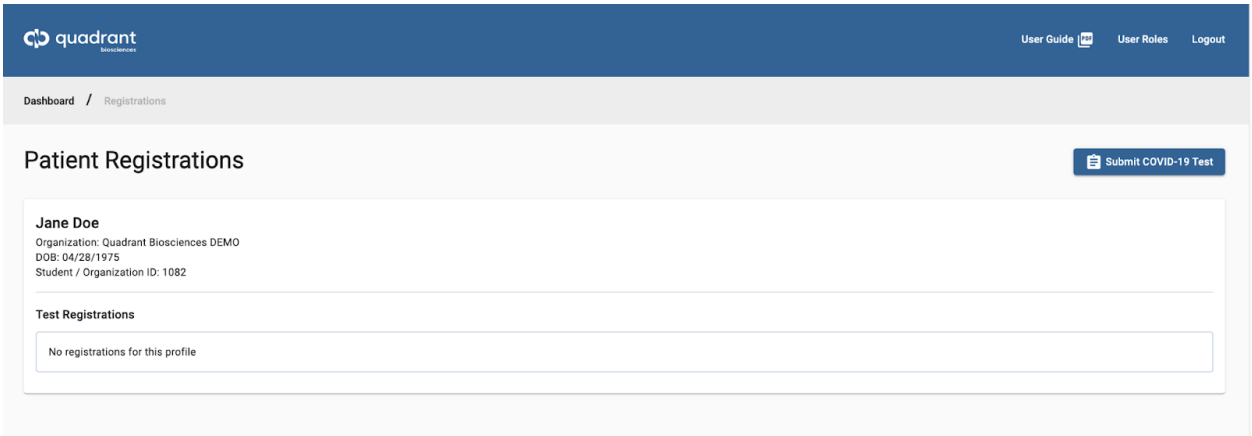


Clicking the "Export Results" option will make all the results of the search available in a comma separated value text file that is downloaded for your use locally.

An example of the file format is shown below:

```
id,studentId,firstName,lastName,dob,address
"57649f70-173a-4f93-88ec-4244aabf99d6",null,"Jon","Doe","03/04/2003","Test123"
"931543a5-a8e8-4482-a261-7734417cb112",null,"Johntest","Doe","03/02/1998","4 Privet Drive"
"b31d62fe-dffb-41bf-9a16-8dbb14c0d005",null,"John","Doe","09/09/1999","129 Sesame St"
```

To view registrations for a matching profile, please click ***View Registrations*** for the individual of interest and any registered tests will be displayed as shown below:



Note that results are not provided, only the date of registration and the barcode associated with the test sample.

Appendix

Authorization Language

The latest version of this language is available at https://info.suny-covid.com/covid-19-authorization.pdf.

Privacy Policy

The latest version of our privacy policy is available at https://quadrantbiosciences.com/privacy-policy/.