

## **Scheduling a New Request**

Click the First Request link within Taleo to bring you to the Order.

### **Step 1 - General Information**

Click Select next to Donor and fill in any missing information, if required.

### **Step 2 - Order Services**

Check the boxes for all the services you are ordering for that Donor. Please choose the service, lab and panel.

### **Step 3 - Collection Site**

1. Click Select next to Collection Site
  - a. You may search using just the City, the State or the Zip or any combination of all three.
  - b. Select the furthest mileage you are willing to send the employee.
  - c. If you are looking for sites with eCCF capabilities, select Electronic Ordering Enabled.
2. Choose the site and click Select to the left of the location.
3. Type in the scheduled date and time  
Please call the clinics to verify the hours of service and/or to make an appointment.

### **Step 4 - Instructions**

1. Special Instruction for Donor  
Allows you to write notes that will display on the authorization that is sent to the employee or prospective employee.
2. Special Instruction for Clinic
  - a. Allows you to write notes that will display on the authorization that is sent to the clinic.
  - b. For DOT UDS, please include the Commercial Drivers' License number and for NON-DOT please include the employee ID number.
3. Message  
Allows you to correspond with your Vault Health team for any assistance.

### **Step 5 - Create Request**

Select Create Request on the bottom right of the screen.

### **Step 6 - Send Correspondences (Authorizations)**

Select who you wish to send the authorization to and click Update Request and Send Correspondence.

- a. The Donor receives an email at the email address you enter during Step 1
- b. The Clinic receives a fax to the number Vault Health has on file.
- c. The Creator receives an abbreviated version of the authorization form and receives notifications about the donor's check-in at the clinic and records when they are uploaded.
- d. The Other option allows you to send a Donor, Clinic or Creator version of the authorization to any person you choose by typing in an email address on the line provided.

## **Viewing a Request**

1. Search for Donor by any combinations of the First Name, Last Name, SSN, date scheduled, test reason, or status. If you want to view all requests, you can simply hit search and they will all appear. You can also export to Excel if necessary.
2. The Request will appear in a list format on the bottom half of the page.
3. Select the magnifying glass to display the request to edit or resend.
4. The drug and alcohol status updates when the drug screen results are available.

Please email [acctmgr@fssolutions.com](mailto:acctmgr@fssolutions.com) if you have any questions.