Client First Request Scheduling Instructions
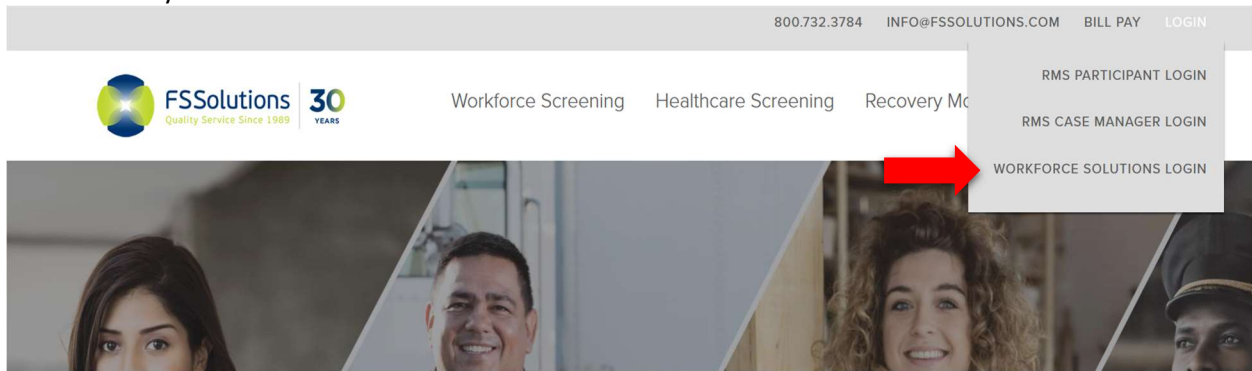
FSSolutions Support

We are available to assist you in utilizing this tool and receiving timely results. If you have any questions, please contact us at:

        Call: 800-732-3784

        Email: OR acctmgr@fssolutions.com
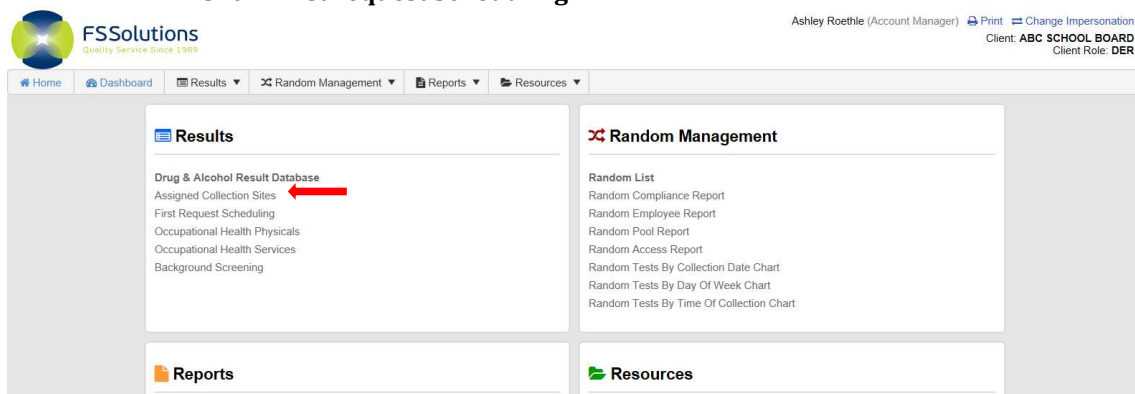
Logging In

- Go to www.fssolutions.com
- Hover over the LOGIN icon in the upper right-hand corner.
- Select Workforce Solutions Login
- Your Login ID is your Email Address
- Your Password is emailed to you and will be a 4-digit, temporary number.
    - You will be prompted to change this and to update your personal information on your first login.
    - Contact your Account Representative if you have any trouble using or logging into the system
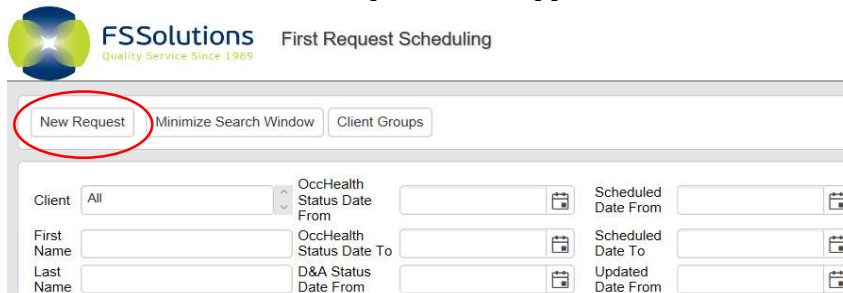
Client First Request Scheduling Instructions

Scheduling in First Request

Using the Scheduling Tool

- **Click 'FirstRequest Scheduling'.**

- **Click 'New Request' in the upper, left-hand corner.**
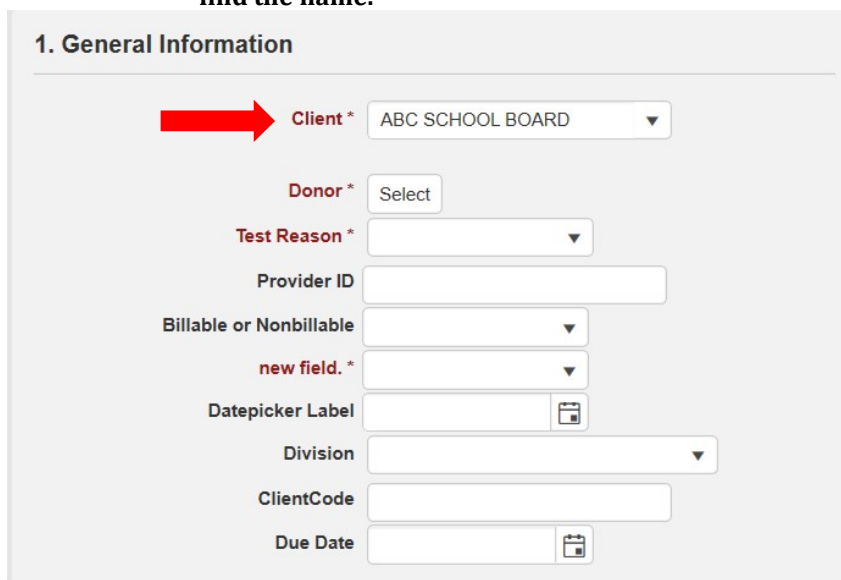
Step 1: General Information

- **Start typing your company name in the Client* field. Auto complete should help you find the name.**

Client First Request Scheduling Instructions

- **Click 'Select' next to Donor* to find your donor.**

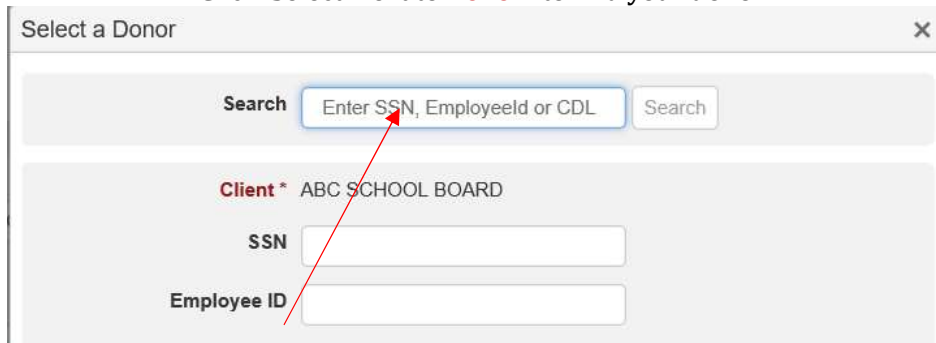## Select a Donor
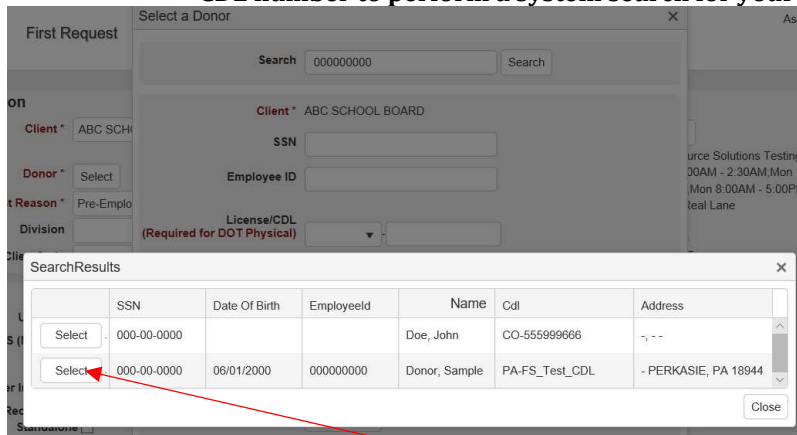
| Search | Enter SSN, EmployeeId or CDL | Search |

Client * ABC SCHOOL BOARD

SSN

Employee ID

- **FSSolutions recommends searching by at least two identifiers: SSN, Employee ID, or CDL number to perform a system search for your donors.**

Select a Donor

First Request

| Search | 000000000 | Search |

Client * ABC SCHOOL BOARD

SSN

Employee ID

License/CDL (Required for DOT Physical)

Client * ABC SCHO

Donor * Select

Reason * Pre-Emplo

Division

SearchResults

	SSN	Date Of Birth	EmployeeId	Name	Cdl	Address
Select	000-00-0000			Doe, John	CO-555999666	-, - -
Select	000-00-0000	06/01/2000	000000000	Donor, Sample	PA-FS_Test_CDL	- PERKASIE, PA 18944

Close

- **If your donor is in FirstRequest, results will populate. Select the correct donor you wish to schedule.**
- **If no results are shown, you will have to manually input the donor information on the 'Select a Donor' window.**
- **The rest of the form should auto-populate with any donor information that is on file. Input any missing information for the donor and/or Update any outdated information on the donor.**

Select a Donor

| Search | 000000000 | Search |

Client * ABC SCHOOL BOARD

| **SSN** | 000000000 | Clear |

| **Employee ID** | 000000000 |

License/CDL (Required for DOT Physical) | PA ▼ | - | FS_Test_CDL |

| **First Name *** | Sample |

| **Middle Name** | |

| **Last Name *** | Donor |

| **Date of Birth *** | 6/1/2000 |

- **Click 'Use This Donor' in the bottom, left-hand corner of the window.**
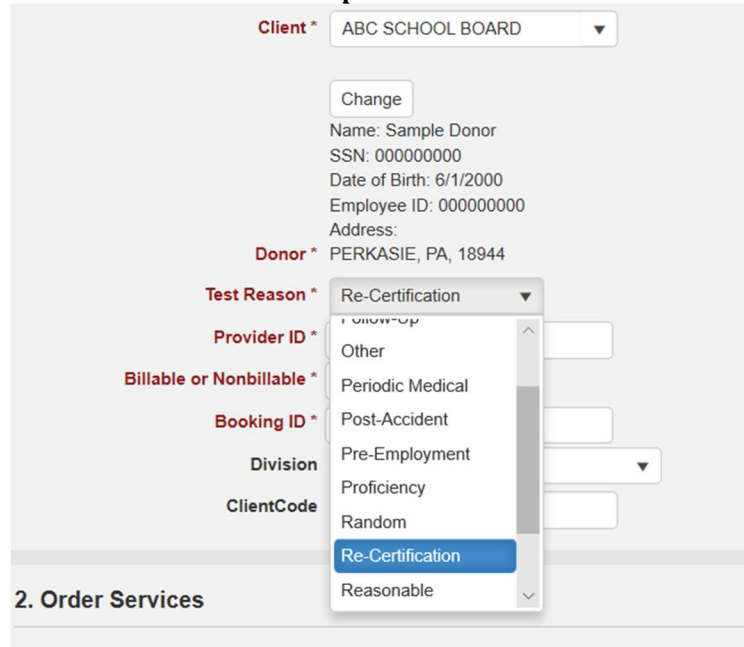
Address Line 1	
Address Line 2	
City	PERKASIE
State	PA ▼

Use This Donor

- **Use the drop-down menu to choose the Test Reason* (Recertification, etc.)**

Client * ABC SCHOOL BOARD ▼

Change
Name: Sample Donor
SSN: 000000000
Date of Birth: 6/1/2000
Employee ID: 000000000
Address:

Donor * PERKASIE, PA, 18944

Test Reason * Re-Certification ▼

Follow-Up
Other
Periodic Medical
Post-Accident
Pre-Employment
Proficiency
Random
Re-Certification
Reasonable

Provider ID *

Billable or Nonbillable *

Booking ID *

Division ▼

ClientCode
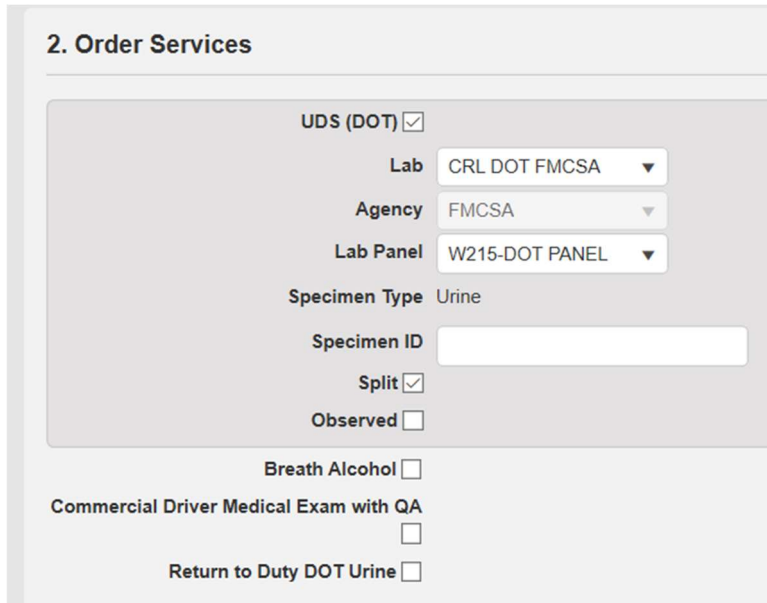
2. Order Services

Step 2: Order Services

- **Check any boxes that you wish to order services for.**

Tip: It is important to check all services. The clinics will not know what to do if the service is not marked and results could be delayed.
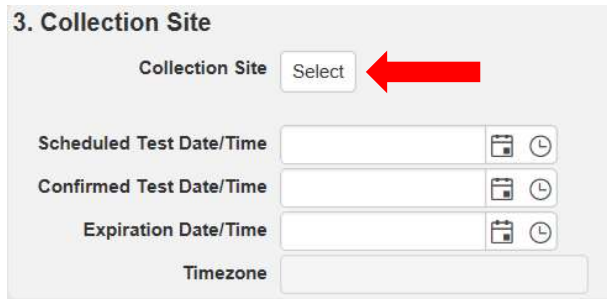
Step 3: Collection Site

- **Click the 'Select' button next to 'Collection Site'.**

Search for a clinic:

- **Define your search parameters**
  - You may search using just the City, State or the Zip or any combination of all three.
  - Select the miles radius (distance from selected city or zip code). Best practice is 20-25 miles from the zip code provided.
  - Click Search

Client First Request Scheduling Instructions

- **Any available sites will show up according to the services you are ordering. Using the bottom scroll bar will allow you to view any extra information for the clinic (hours of operation, truck/trailer parking, etc.).**

 - Indicates the collection site does not perform electronic collections for the Service/Lab combination selected

 - Indicates the collection site performs electronic collections for the Service/Lab combination selected

Tip: If either, depending on services ordered, D&A (drug and alcohol testing) or OH (occupational health and CDME) Walk-In are **No**, you must call the site to schedule an appointment and then set the Scheduled date/time of service in the appointment in FirstRequest.

- **Click 'Select' for the clinic you would like to schedule with.**
- **Adding the Scheduled Test Date/Time and Expiration Date/Time Fields:**

o **SCHEDULED DATE/TIME:** Type in the scheduled date and time of the manual appointment with the clinic if not a Walk-In site, or a date/time you would like the authorization to be valid from – you can click on the calendar to the right to pick a date or type it in manually.

o **CONFIRMATION DATE/TIME:** Leave Blank when Scheduling.

o **EXPIRATION DATE/TIME** – This is defaulted to 48 hours from the Scheduled Date/Time, FSSolutions can configure this to 24 or 72 hours if you would like. You can also manipulate this manually within the appointment if you need a different timeframe.

IMPORTANT- Please keep in mind that our teams do not reach out to retrieve service documents until after an order has expired. The only exception is when the Confirmation Date/Time are entered when it has been confirmed that your donor has gone in for services. The Confirmation Date/Time then overrides the Expiration Date/Time and kicks off a notice for our team to start the retrievals process.

Exceptions:
a. If ordering with an electronic capable site, FSSolutions may receive an electronic feed with the Confirmation Date/Time.
b. If you or your staff confirm with the donor that they have gone in for services, they may enter the Confirmed Date/Time in the open order.

Client First Request Scheduling Instructions

Step 4: Instructions (Optional)

- Special Instruction for Donor – will show on Authorization, Not recommended for DOT Random Testing
- Special Instruction for Clinic –will show on Authorization

Step 5: Create Request

- **Click 'Create Request' in the bottom, right-hand corner of the screen to save your information.**
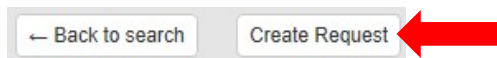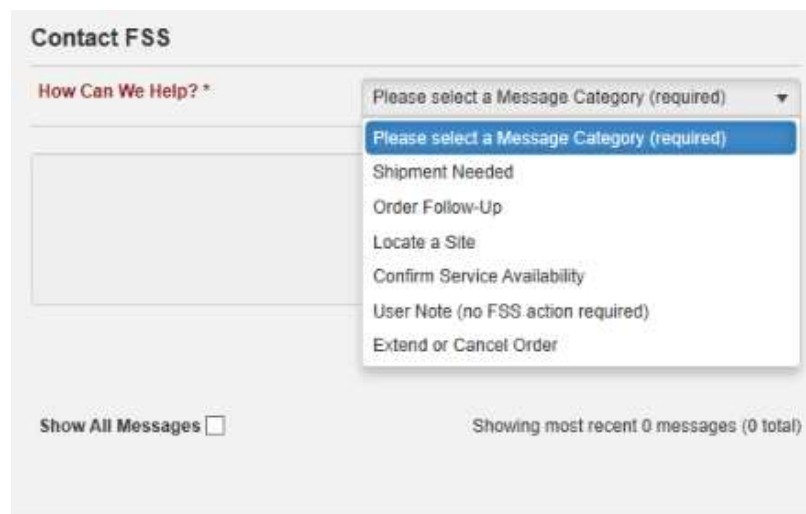
- **You will get a message at the top of the screen letting you know the appointment was successfully created.**
- **Please continue to finalize appointment and send authorization for services**

Step 6: Contacting FSSolutions and Sending Authorization to clinics

Messages: Available after the appointment is created. Please select a category.

- Send a message/inquiry to FSSolutions or post a message for anyone with FirstRequest access on your teams to view. This tool will improve communication by routing your messages to the correct teams and ensure quick response times, by alleviating the need for multiple emails to different departments.
- This tool allows you and your team members with access to see any progress and notes from FSSolutions on an order as well. We will NEVER include HIPAA info in this area

FSSolutions
Quality Service Since 1989

Simply select one of the 6 message categories and add a brief description of your question or need.

o   Shipment Needed: In an instance where you confirmed the site is low on chains or is needing a new supply shipped. Please keep in mind shipment takes 7-10 business days.

o   Order Follow-Up: To inquire about the status of an order after the expiration date has passed or after a confirmation date has been entered.

o   Locate a Site: If you need assistance locating a collection site in an area or need to add one for the order to be placed. Please indicate what zip code/city/state you are needing a collection facility in.

o   Confirm Service Availability: If you need help in finding a site that can perform multiple services. Typically, this is used for vaccine, Pulmonary Function Test, or Hazmat Physical availability.

o   User Note (No FSS action required): Notes to other users within your organization that do not require any action by FSSolutions teams.

o   Extend or Cancel Order: If you are unable to extend the expiration date or cancel the appointment for any reason. Please use this section for assistance.

Send Authorization Form:

o   Creator – Goes to whomever created the appointment (verify in the Statuses section)

o   Clinic – Faxes or Emails to the clinic

o   Donor – If donor email is listed in Section 1. Not Recommended for Random Testing.

o   Other – To send to a colleague or other email address.

- **Click 'Update Request & Send Authorization'. The Authorization can be resent any time after the appointment is created. If you update anything within the appointment, please resend the authorization to ensure the clinic has the most updated version.**

Send Authorization Form

Send To: ☑ Creator   ☑ Clinic   ☐ Donor   ☐ Other

[Update Request & Send Authorization]

Date / Time	Sent To	Sent By
03/10/2021 05:09 PM	Creator jdedering@fssolutions.com	fl.jdedering
03/10/2021 05:09 PM	Clinic Fax - Authorization Form Fax:9204342483	fl.jdedering

Client First Request Scheduling Instructions

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Statuses: Shows the progress of ordered services.

Statuses

D&A Status	Assigned
OccHealth Status	N/A
Background Screening Status	N/A
Created By	fl.jdedering on 2/26/2021 10:10 AM
Last Updated By	fl.jdedering on 3/10/2021 5:11 PM

← Back to search   Cancel   Update Request

- **"Back to search" will bring you back to the First Request Scheduling page**
- **"Cancel" will cancel the appointment and send a Cancellation Notice to the clinic and Donor if their email is in the Donor Information.**
  - o **Note: You cannot update or reactivate a Cancelled appointment. You will have to create a new appointment.**
- **"Update Request" Saves your information and should only be used if the appointment information has been changed (i.e. Clinic location, appointment dates, and services). This does NOT include use of the messaging tool.**

Updating a Current Request
- **Log into First Request**
- **Search for the donor using their name, SSN, CDL, or donor ID.**

- **Click on this icon next to the Donor Name:** 🔍
- **The appointment can be updated, and correspondence can be resent**