



## GET STARTED GUIDE

### USER TYPES

*\*\* There can be multiple Admin Users and Analysts Users per laboratory.*

#### **Admin User**

- Full control and all access to the PT Portal features.
  - Lab Management
  - Test Management
  - Order Management
  - Report Management
  - File Appeal

#### **Analysts User**

- Limited access to assigned PTs.
  - My Tests (assigned PTs)
  - Test Review (assigned tech and/or admin review)

#### **Purchasing User (Coming Soon)**

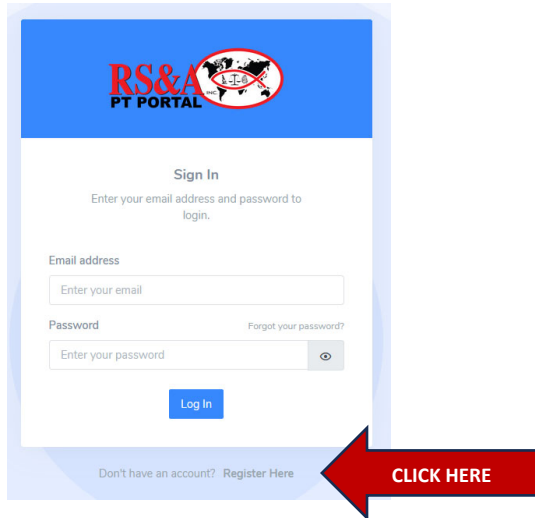
- Limited access to purchasing specific features.
  - Order Management

## CREATE AN ACCOUNT

\*\* A single account is allowed per physical laboratory location.

\*\* Multiple laboratory locations can be created under a single account.

1. Visit <https://ronsmithandassociates.com/PTPortal>
2. Click “Don’t have an account? **Register Here**”



### 3. Follow the registration wizard to complete your account setup.

- a. My Account
  - i. Master Account - Name/Email/Password
- b. Billing
  - i. Billing Address of the laboratory.
    1. Should match purchasing card billing address.
- c. Shipping
  - i. Shipping Address physical PTs will be mailed to.
- d. Accreditation
  - i. Laboratory Accreditation Information
    1. It will be used if submitting test results to an accrediting body. (i.e., ANAB, A2LA)
- e. Point of Contact
  - i. Primary Contact for laboratory PTs.
    1. You may assign a second POC if needed.
- f. Users
  - i. Set up additional Admin Users or Analysts Users within the laboratory you are creating.
  - ii. If the user may perform Tech or Admin Reviews, select the disciplines in which they will complete reviews.
    1. This is used in test assignment workflows.

## **ADMIN USER FEATURES**

- **My PT Calendar**
  - Shows RS&A set calendar events.
  - Create your calendar event by double-clicking a specific day.
  
- **Lab Management**
  - My Laboratories
    - Manage laboratory information.
      - Billing / Shipping / Accreditation Info / Point of Contact
    - Add a new laboratory.
  - My Users
    - Add new laboratory users. (Admin User and Analyst User)
  
- **Test Management**
  - My Tests
    - Shows purchased tests along with status and due date.
  - Test Assignment
    - Shows purchased PTs ready for assignment.
    - Shows assigned PTs along with their status in the assigned workflow.
  - Test Review
    - Shows any user-assigned PTs pending tech and/or admin review.
  
- **Order Management**
  - Create a Quote
  - My Quote Queue
    - Shows quotes that have not been converted to an order.
  - Order Tests
    - Skip the quote and create an order/invoice directly.
  - My Order Queue
    - Ordered PTs and their current payment status.
  - Print an Invoice
  
- **Report Management**
  - Active Reports
  - Upcoming Reports
  - Report Archive
  
- **File Appeal**

## **ANALYSTS USER FEATURES**

- **My PT Calendar**
  - Shows RS&A set calendar events.
  - Create your calendar event by double-clicking a specific day.
  
- **My Tests**
  - Shows purchased tests along with status and due date.
  
- **Test Assignment**
  - Shows purchased PTs ready for assignment.