



**FSSolutions**

Quality Service Since 1989

***Drug & Alcohol Testing Program***

***DER HANDBOOK***



Welcome to FSSolutions!

We have compiled a few documents that we hope will assist you in utilizing your services with FSSolutions. We know that transitioning into a new position can be daunting and we are here to help make the transition as smooth as possible!

In your Welcome Booklet, we have included the following:

- **FSSolutions Key Contacts**

This provides you with the phone numbers and emails to key contacts within our organization, including the Account Representative Team that will assist you with your day to day needs.

- **FirstRequest Instructions**

FirstRequest is our service ordering and results retrieval system. You are able to schedule a request for service, view a previously scheduled service, view and print test results, retrieve your random pool (if using our Random Program), view your assigned collection sites and create various reports. You may reach out to your Account Representative Team to schedule a training session for FirstRequest.

- **Online Invoice Instructions**

Our invoices are online. This document will instruct you how to access invoices as well as download and pay them.

- **Account Change Form**

Complete this form and return it to your Account Representative Team when you have any changes to your company address, phone, fax or DER.

We are here to make your job easier, so please do not hesitate to reach out to anyone here at FSSolutions – we are your partner in success!



**FSSolutions**  
Quality Service Since 1989

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## **FSSolutions Key Contact Information**

### **Service Operations:**

**FSSolutions Account Representative Team:** 800-732-3784 ext. 5807  
acctmgr@fssolutions.com

**Director, Service Operations:** Brittany Marino ext. 5507  
800-732-3784  
bmarino@fssolutions.com

### **Corporate Leadership Team Contacts**

**Chief Compliance Officer:** Shawn O'Neil ext. 7603  
855-610-9373  
soneil@fssolutions.com

**Chief Medical Review Officer:** Dr. Randy Barnett  
888-676-7616  
rbarnett@fssolutions.com

**Chief Operating Officer:** Stacy Williams  
800-732-3784 ext. 5517  
swilliams@fssolutions.com

### **After Hours Emergency**

**On-Call FSSolutions Representative:** 800-732-3784  
Trucking and Airline Clients ext. 5807  
All other clients ext. 5806

### **Finance**

**Finance Representative:** 800-732-3784  
AR@fssolutions.com

### **Randoms/Compliance/MRO**

**Randoms Coordinator:** 800-732-3784 ext. 5521  
randoms@fssolutions.com

**Compliance Team:** 800-732-3784  
[compliance@fssolutions.com](mailto:compliance@fssolutions.com)



## Scheduling a New Request

1. Go to [www.fssolutions.com](http://www.fssolutions.com)
2. Select the LOGIN icon in the upper right-hand corner.
3. Select Workplace Client Login
  - Login ID: Your e-mail
  - Password: Assigned 4 digit code (sent by separate e-mail)
4. You will be prompted to enter a new password the first time you use our system. You will also need to update your information.
5. Once logged in, you will be brought to your dashboard where you can select First Request Scheduling.
6. In the upper left-hand corner select New Request
7. Complete the request form by following the steps below:

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

1. Click Select next to Donor and fill in the required fields indication in **Red\***
  - a. Tip: It is helpful to enter all the donor demographics to allow FSSolutions to contact them if needed.
2. Select the reason for ordering the testing using the drop down.
3. Select the Division and Client Code (if applicable).

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

1. Check the boxes for the services you are ordering.
  - a. Tip: It is important to check all required services to allow prompt follow up at FSSolutions for results.

### **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 the donor requires truck/trailer parking select that option.
  - d. If you are looking for sites with eCCF capabilities, select FormFox enabled.
2. Choose the site and click Select to the left of the location.
  - a. Tip: Use the scroll bar to see information such as hours, if truck/trailer parking is available and if they are a walk-in facility.
3. Type in the scheduled date and time
  - a. Tip: Don't forget to call the clinics to verify the appointment date/time if they are not a walk in facility

### **Step 4 - Instructions**

1. Special Instruction for Donor
  - a. 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.
3. Message
  - a. Allows you to correspond with your FSSolutions team for any assistance.

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

1. Select Create Request on the bottom right of the screen.

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

1. 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 FSSolutions 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.
  - a. Tip: 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.
5. The Occupational Health status changes when the physical is reviewed or records for other occupational health services have been uploaded.

#### **Using the Drug & Alcohol Results Database**

This section of the system reports drug and alcohol test results and allows you the option to edit fields, archive records, batch print and view results certificates and chain of custody forms separately.

#### **Searching/Sorting:**

- Specify a date range for your search by changing the from and to dates.
- Set your "View Archives" to "All" or "Yes" by selecting your preference in the drop-down.
- Sort results on the summary screen by clicking the column header.
- Search for specific results by Donor ID, Donor Name, Specimen ID, Cost Center, Collection Date, Result, Dilute or Reason for test.



### **Print an individual result**

- Result Certificate Only: Go to column titled “Cert”, click on icon.
- CCF Image Only: Go to last column titled “CCF”, click on icon.

### **Print all results listed:**

- Check the results you want to print.
- Then select “Certificates Only”, “Combined” or “CCF only” in the dropdown shown on the menu bar.
- Click the “Print” button in the menu.

### **Archive results:**

- Check box in Archive column next to result and click the “Archive” button.
- Check box at the top of the Archive column to select all.

### **Editing:** Edits can only be made to name, donor ID and reason for test.

- Check icon in edit column for pop up box.
- Change incorrect information and click “update” button to save.

### **Email Inquiries:**

- Click on icon under Inquiry column for pop-up email to FSSolutions.

## **REPORTS**

### **Test Summary**

- MIS style statistics

### **Test Type Report**

- Detailed information on each donor

### **Random List**

- Donors selected for random testing

### **Random Employee Report**

- Random Selections & Test data including date of selection, test and who was not tested

### **Random Pool Report**

- Current listing of eligible employees

### **Assigned Collection Sites**



## **FSSolutions' Random Selection Process**

FSSolutions uses a proprietary software system specifically designed for generating random lists in accordance with regulatory requirements. The system is written in ASP.NET 4.0 using C# and accesses a Microsoft SQL Server database. The random generator is integrated with Phoenix, FSSolutions' result retrieval system.

The process for selecting a list of employees is straightforward. The client would provide a list of eligible employees to FSSolutions. This list is imported into the database. A complete history of employees is kept, as employees no longer on the eligible list are marked as ineligible. A copy of all employee pools used to generate random lists is kept and can be retrieved at any time. The client's program specifications are also set up in our database.

FSSolutions' random program will generate a set of random numbers. They are used to randomly generate the list of selected employees. The selections for drug and alcohol will be picked simultaneously allowing the same individual to be picked for drug, alcohol or both drug and alcohol. After these selections have been made, the remaining employees are used to generate an alternate list if requested.

The program will generate a report of the individuals selected for random testing. This report is transmitted by secure means to the DER by the first business day of the selection period.

The next time a random list is generated, the process is repeated. Each time a list is generated every employee has an equal chance of being selected.





## Online Invoice Instructions

### 1. Online Invoice Access:

- a. Go to [www.FirstSourceSolutions.com](http://www.FirstSourceSolutions.com). Log into your account
- b. Once on the home page of your account select the **“Invoices”** link located in the bottom right-hand side of the page within the Resources section

The screenshot shows the FirstSource Solutions dashboard for a client named ABC SCHOOL BOARD. The navigation bar includes Home, Dashboard, Results, Random Management, Reports, and Resources. The Resources section is expanded, showing a list of links: Invoices (circled in red), DOT Updates, FirstLab Reports, and Forms. Other sections visible include Results (Drug & Alcohol Result Database) and Random Management (Random List).

- c. You can also access the invoices through the navigation bar under resources

This screenshot shows the same dashboard as above, but with the Resources dropdown menu open. The 'Invoices' link is circled in red. The dropdown menu lists various forms for different states, including Arkansas, New Mexico, North Carolina, Oregon, South Carolina, Texas, and Washington.



## 2. Select Invoices

- a. Pay Now
  - i. The ability to pay for an invoice online

- b. The grid will display the following:
  - i. Displays the client's account name and/or child account name(s)

Client Name
ABC SCHOOL BOARD

- b. Invoice No.
  - i. Displays the Invoice's assigned number

Invoice No
FL0012345




- c. Invoice Date
  - i. Date that the invoice was uploaded from FSSolutions for the Client to view


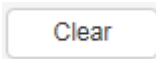
- d. Invoice
  - i. Downloadable invoice for the client in either PDF or Excel format

- e. History
  - i. Displays the history trail of the invoice

### 3. Grid Filters:



- a. If you wish to filter or search for a specific items within the columns you may select the  icon in the column header. This will now display a filter criteria box in which you can specify the information you wish to search for within that column

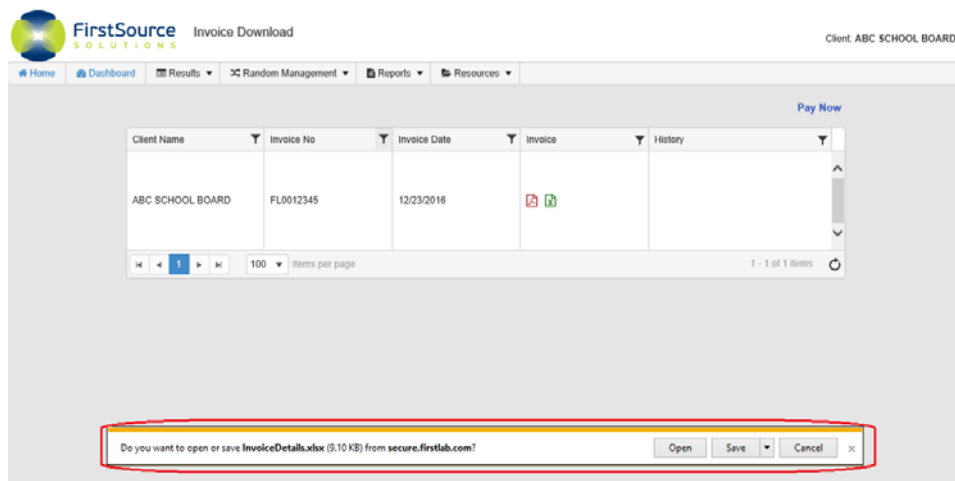
- b. Once criteria has been entered click 

- c. If you no longer wish to filter the grid anymore click the  within the column that you applied the filter. Then select the  button.





#### 4. Downloading Invoices:

- a. There are two versions of the invoices that are able to be downloaded. Simply click the icon within the "Invoice" column and the download will initiate
  - a. PDF 
  - b. Excel 
- b. Once you have chosen the appropriate Invoice file to download a notification will display at the bottom of your web browser



The screenshot shows the FirstSource SOLUTIONS Invoice Download interface. The top navigation bar includes Home, Dashboard, Results, Random Management, Reports, and Resources. The client name is ABC SCHOOL BOARD. A table displays invoice information:

Client Name	Invoice No	Invoice Date	Invoice	History
ABC SCHOOL BOARD	FL0012345	12/23/2018	 	

At the bottom of the interface, a notification box is highlighted with a red rectangle, asking: "Do you want to open or save InvoiceDetails.xlsx (9.10 KB) from secure.firsttab.com?". The notification includes "Open", "Save", and "Cancel" buttons.

- c. You now have the option to either open or save the invoice



## Account Change Form

Company Name \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### CONTACTS

**Designated Employer Rep (DER)** (Negative and Positive Results, Random lists, Invoices)

\_\_\_\_\_  
(Name & Title)

Phone # \_\_\_\_\_ Ext. \_\_\_\_\_ Fax # \_\_\_\_\_

E-mail address \_\_\_\_\_

**Alternate DER** (Contacted when Primary DER is unavailable)

\_\_\_\_\_  
(Name & Title)

Phone # \_\_\_\_\_ Ext. \_\_\_\_\_ Fax # \_\_\_\_\_

E-mail address \_\_\_\_\_

Would you like this person to have Web Access? \_\_\_\_\_ Y \_\_\_\_\_ N

Effective Date: \_\_\_\_\_ Signature: \_\_\_\_\_

Authorized by: \_\_\_\_\_  
Print Name & Title

Please remove the following names from our account: \_\_\_\_\_

Please list the following names as additional alternates: \_\_\_\_\_

**EMAIL completed form to acctmgr@fssolutions.com**

**INTERNAL USE ONLY**

PC	_____	_____	REVS/S	_____	_____
ACCT	_____	_____	AR SCHED	_____	_____
COPY	_____	_____	LABAGE	_____	_____
MISC	_____	_____	QB	_____	_____