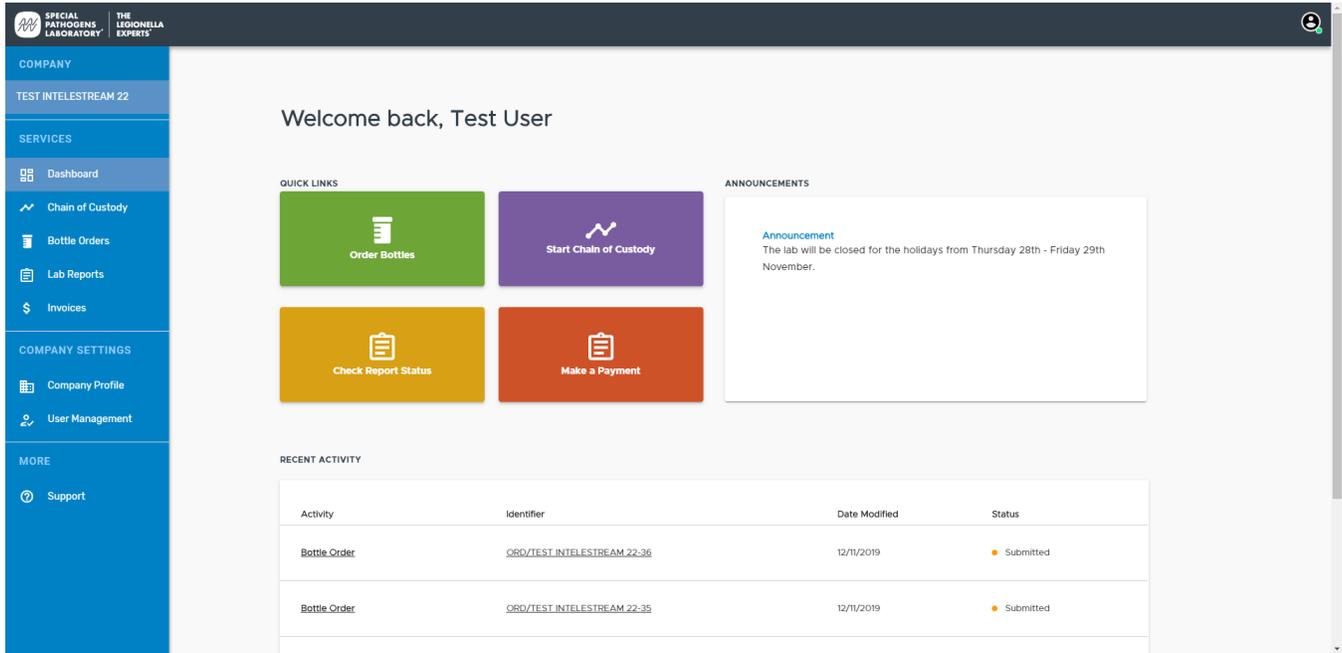


# MySPL Portal: Getting Started



The screenshot shows the MySPL portal interface. On the left is a blue navigation sidebar with sections: COMPANY (TEST INTELESTREAM 22), SERVICES (Dashboard, Chain of Custody, Bottle Orders, Lab Reports, Invoices), COMPANY SETTINGS (Company Profile, User Management), and MORE (Support). The main content area is titled 'Welcome back, Test User' and features a 'QUICK LINKS' section with four buttons: 'Order Bottles' (green), 'Start Chain of Custody' (purple), 'Check Report Status' (orange), and 'Make a Payment' (red). To the right is an 'ANNOUNCEMENTS' box with a notice about lab closure for holidays. Below is a 'RECENT ACTIVITY' table.

Activity	Identifier	Date Modified	Status
Bottle Order	<a href="#">ORD/TEST_INTELESTREAM_22-36</a>	12/11/2019	Submitted
Bottle Order	<a href="#">ORD/TEST_INTELESTREAM_22-35</a>	12/11/2019	Submitted

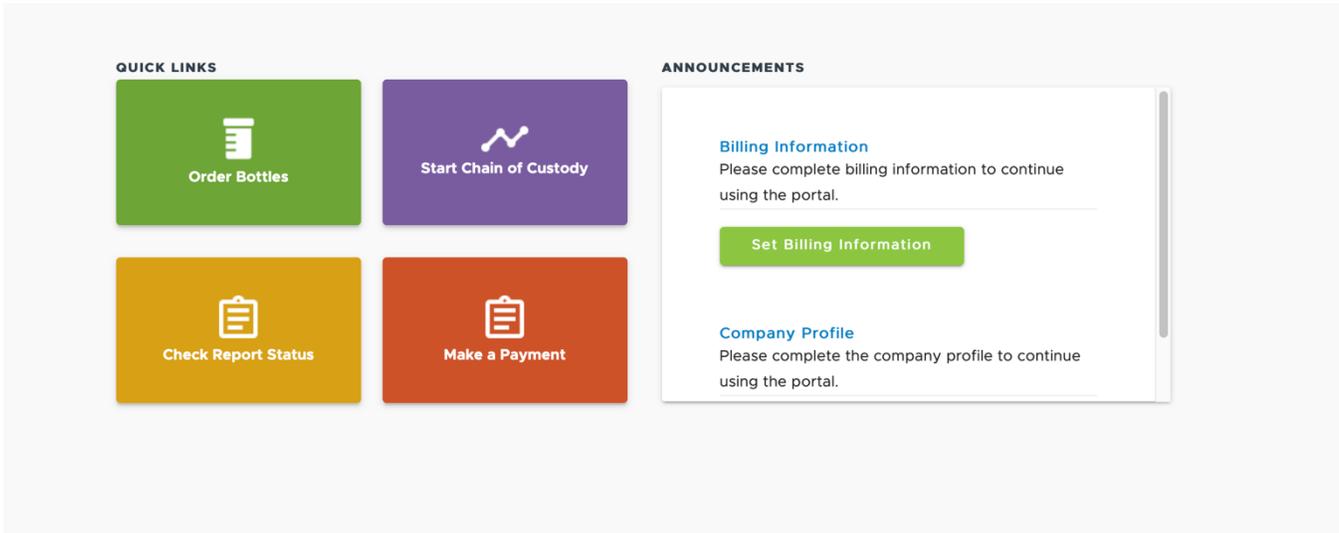
<b>SETTING UP YOUR ACCOUNT</b>	<b>2</b>
<b>DASHBOARD</b>	<b>3</b>
<b>INVITING AND MANAGING USERS</b>	<b>4</b>
<b>VIEWING, EDITING, AND CREATING BOTTLE ORDERS</b>	<b>6</b>
<b>VIEWING, EDITING, AND CREATING CHAINS OF CUSTODY</b>	<b>7</b>
<b>CHECKING REPORT STATUS</b>	<b>9</b>
<b>MAKING A PAYMENT</b>	<b>10</b>

## Need help?

Email [support@specialpathogenslab.com](mailto:support@specialpathogenslab.com) and enter MySPL in the subject line of your email or click **Support** in the left navigation menu in MySPL.

# MySPL Portal: Getting Started

## Setting up your account



The screenshot displays the MySPL Portal dashboard. On the left, under the heading "QUICK LINKS", there are four colored buttons: a green button for "Order Bottles", a purple button for "Start Chain of Custody", a yellow button for "Check Report Status", and an orange button for "Make a Payment". On the right, under the heading "ANNOUNCEMENTS", there are two sections. The first is "Billing Information" with the text "Please complete billing information to continue using the portal." and a green button labeled "Set Billing Information". The second is "Company Profile" with the text "Please complete the company profile to continue using the portal."

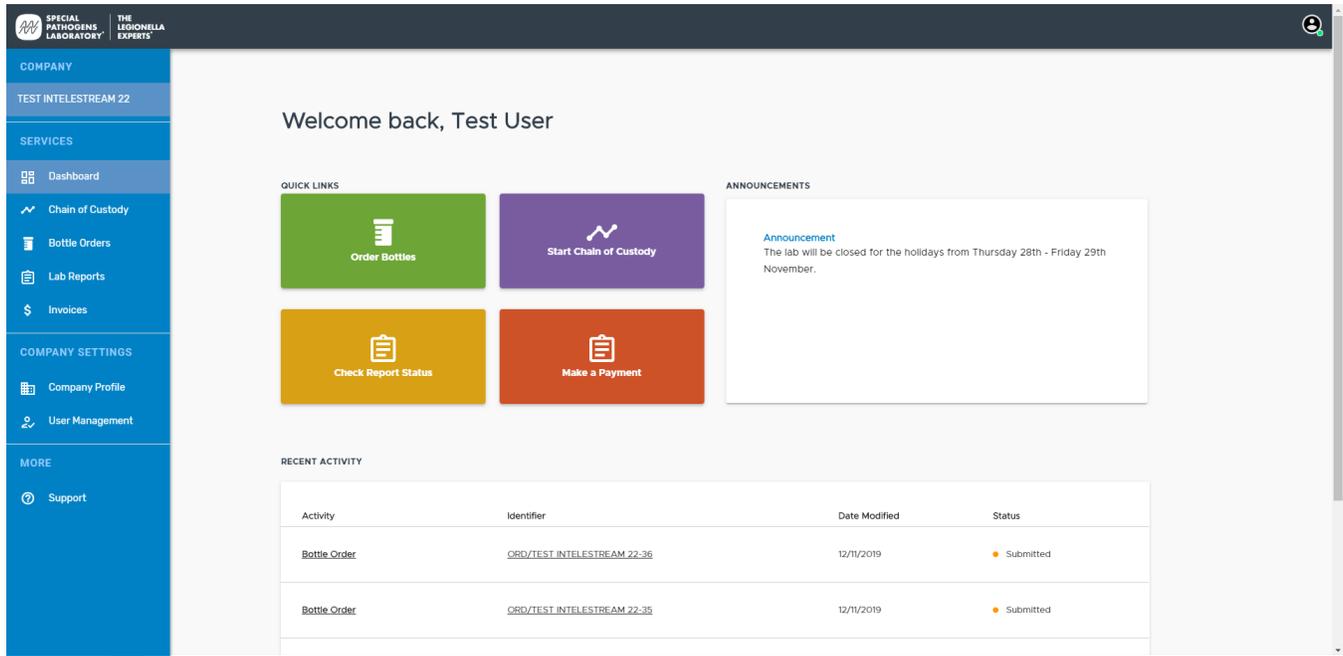
- Check your inbox for an email from [clientservices@specialpathogenslab.com](mailto:clientservices@specialpathogenslab.com) (Please add to your contacts to ensure delivery). This email contains your registration link.
- Create your password, accept the terms of agreement, set up and confirm your billing information and company profile.
- Invite your team!

## Need help?

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# MySPL Portal: Getting Started

## Dashboard



The screenshot shows the MySPL Dashboard interface. On the left is a blue navigation sidebar with sections: COMPANY (TEST INTELESTREAM 22), SERVICES (Dashboard, Chain of Custody, Bottle Orders, Lab Reports, Invoices), COMPANY SETTINGS (Company Profile, User Management), and MORE (Support). The main content area is white and features a welcome message: "Welcome back, Test User". Below this are "QUICK LINKS" with four colored buttons: "Order Bottles" (green), "Start Chain of Custody" (purple), "Check Report Status" (yellow), and "Make a Payment" (orange). To the right is an "ANNOUNCEMENTS" box with a message: "Announcement: The lab will be closed for the holidays from Thursday 28th - Friday 29th November." Below the quick links is a "RECENT ACTIVITY" table.

Activity	Identifier	Date Modified	Status
Bottle Order	<a href="#">ORD/TEST_INTELESTREAM_22-36</a>	12/11/2019	Submitted
Bottle Order	<a href="#">ORD/TEST_INTELESTREAM_22-35</a>	12/11/2019	Submitted

The Dashboard is the first screen to display after logging on to your account. Here you can:

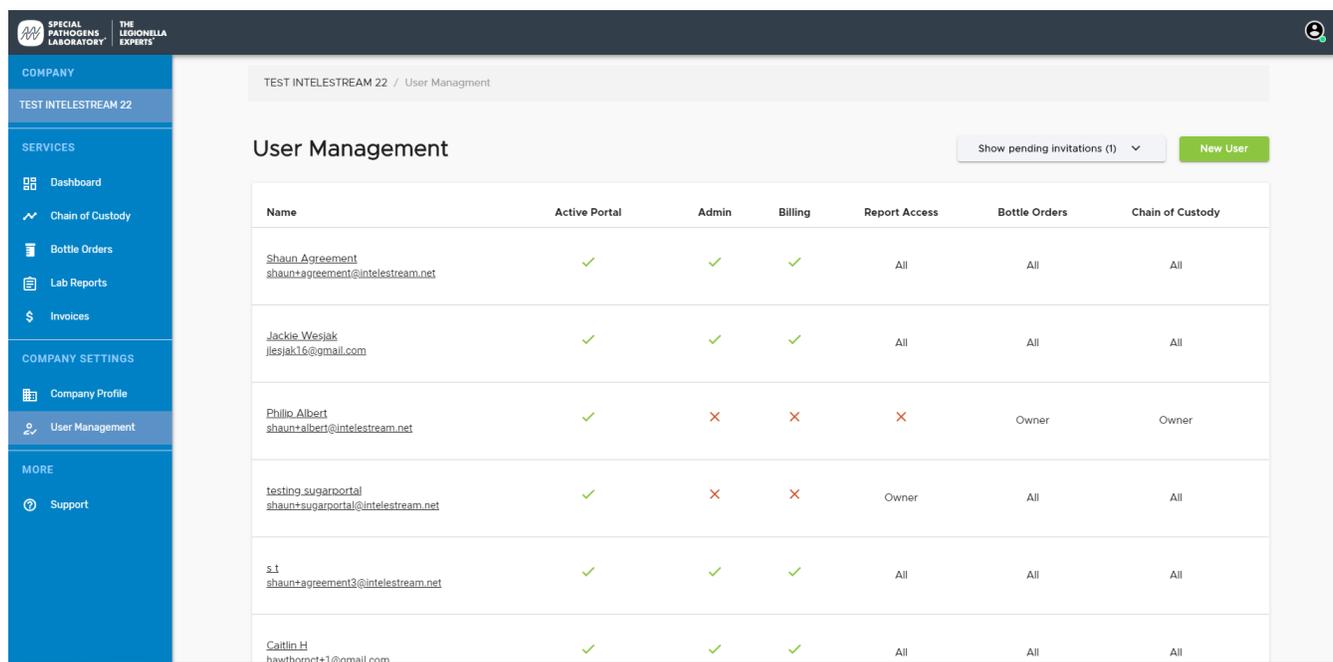
- Order bottles
- Create Chains of Custody
- Check report status
- Make a payment
- See announcements from SPL
- View your recent activity
- Manage users
- Update company profile

## Need help?

Email [support@specialpathogenslab.com](mailto:support@specialpathogenslab.com) and enter MySPL in the subject line of your email or click **Support** in the left navigation menu in MySPL.

# MySPL Portal: Getting Started

## Inviting and managing users



The screenshot shows the 'User Management' page in the MySPL portal. The page title is 'TEST INTELESTREAM 22 / User Management'. There is a 'Show pending invitations (1)' dropdown and a 'New User' button. The main content is a table with the following columns: Name, Active Portal, Admin, Billing, Report Access, Bottle Orders, and Chain of Custody.

Name	Active Portal	Admin	Billing	Report Access	Bottle Orders	Chain of Custody
Shaun Agreement <a href="mailto:shaun+agreement@intelestream.net">shaun+agreement@intelestream.net</a>	✓	✓	✓	All	All	All
Jackie Wasjak <a href="mailto:jwasjak16@gmail.com">jwasjak16@gmail.com</a>	✓	✓	✓	All	All	All
Philo Albert <a href="mailto:shaun+albert@intelestream.net">shaun+albert@intelestream.net</a>	✓	✗	✗	✗	Owner	Owner
testing.sugarportal <a href="mailto:shaun+sugarportal@intelestream.net">shaun+sugarportal@intelestream.net</a>	✓	✗	✗	Owner	All	All
s.t <a href="mailto:shaun+agreement3@intelestream.net">shaun+agreement3@intelestream.net</a>	✓	✓	✓	All	All	All
Caitlin H <a href="mailto:haythornct1@gmail.com">haythornct1@gmail.com</a>	✓	✓	✓	All	All	All

In **User Management**, admins can invite users, assign roles, and set permissions. Roles and permissions are indicated by a checkmark; an “x” indicates access and permissions not granted.

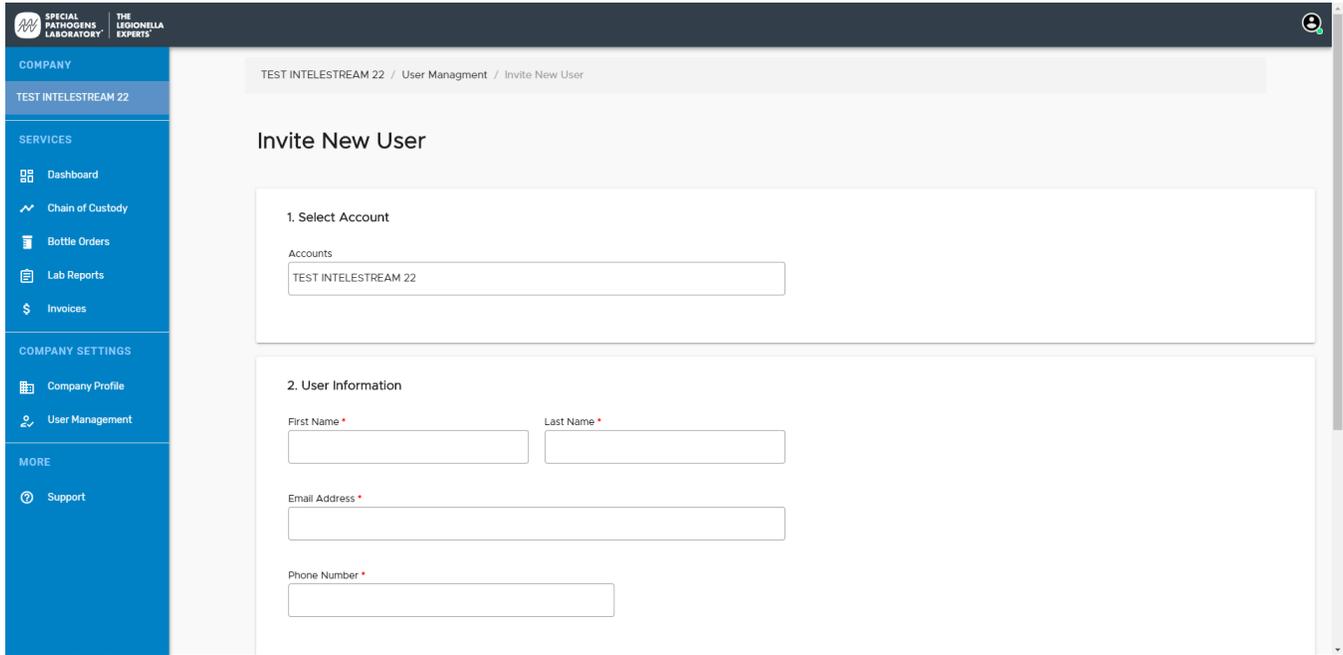
The following roles are visible in the portal when assigned by the admin user. Roles can be restricted to the data a user creates (Owner) or expanded to include all information in the portal (All).

- **Active portal:** The admin can change the status of an active user to inactive when a user no longer requires portal access.
- **Billing:** Users with access to billing can update information and pay invoices.
- **Report Access:** Users with **Owner** permissions can access reports linked to Chains of Custody they submitted. Users with **All** permissions can access all reports.
- **Bottle orders:** Users with access to bottle orders can submit bottle orders. Users with **Owner** permissions can view and edit their bottle orders. Users with **All** permissions can view and edit all bottle orders in the portal.
- **Chain of Custody:** Users can create and submit Chains of Custody. Users with **Owner** permissions are restricted to their chains of custody. Users with **All** permissions can view and edit all Chains of Custody.

## Need help?

Email [support@specialpathogenslab.com](mailto:support@specialpathogenslab.com) and enter MySPL in the subject line of your email or click **Support** in the left navigation menu in MySPL.

# MySPL Portal: Getting Started



The screenshot shows the 'Invite New User' page in the MySPL portal. The page has a dark blue header with the company logo and name. Below the header is a navigation menu with sections for 'COMPANY', 'SERVICES', 'COMPANY SETTINGS', and 'MORE'. The main content area is titled 'Invite New User' and contains two sections: '1. Select Account' and '2. User Information'. The '1. Select Account' section has a dropdown menu for 'Accounts' with 'TEST INTELESTREAM 22' selected. The '2. User Information' section has four input fields: 'First Name', 'Last Name', 'Email Address', and 'Phone Number', each with a red asterisk indicating it is required.

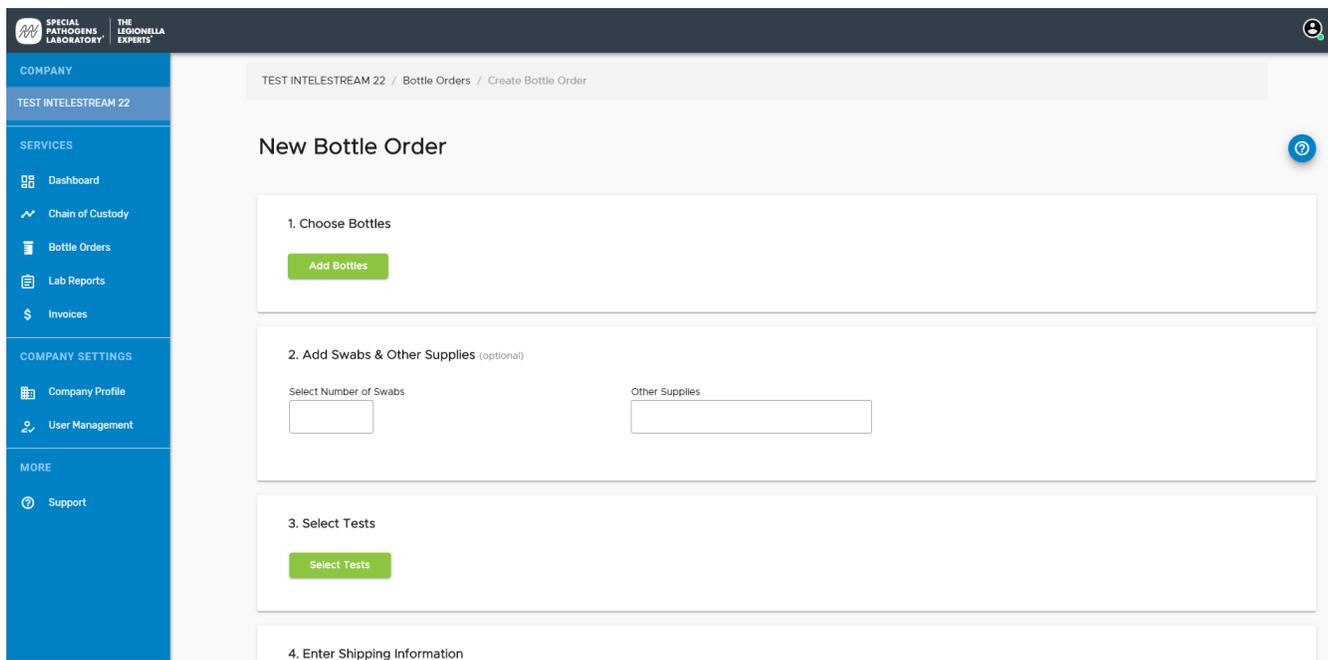
- To invite a user, click the **New User** button in the top righthand side of the page. Enter the user's information and choose permissions.
- Users will receive an email with a registration link. View pending invitations by clicking **Show pending invitations**.

## Need help?

Email [support@specialpathogenslab.com](mailto:support@specialpathogenslab.com) and enter MySPL in the subject line of your email or click **Support** in the left navigation menu in MySPL.

# MySPL Portal: Getting Started

## Viewing, editing, and creating bottle orders



View, edit, and create bottle orders by clicking **Bottle Orders** in the sidebar. *Orders in draft status can be edited; orders that have been submitted cannot be changed.* Also displayed is Order Date, Bottles (number and size), Swabs, the submission status (Draft, Submitted, Shipped), and the FedEx or UPS tracking number.

- To update, click the **Order Number**. To edit a bottle order draft, click the name of the order you would like to edit and follow the steps.
- To order bottles, click the **Order Bottles** button under **Quick Links** on your dashboard and enter your information.
- **Choose Bottles:** Click the green **Add Bottles** button. Use the dropdown box to select the appropriate bottle size and type the desired quantity of bottles in the Quantity box. To add bottles of another size, just click **Add Bottles** again and select a different size. To delete a row, click the trashcan icon.
- **Order Other Supplies:** To order swabs, type the number of swabs you need in the **Select Number of Swabs** box. To order testing supplies (e.g. boxes, liners, cold packs, etc.), list the supplies and quantities in the **Other Supplies** box.
- **Select Tests:** Click the **Select Tests** button and using the checkboxes to check the appropriate tests. Once you have selected your tests, click **Done**. To add or remove tests, simply click the **Edit Tests** button.

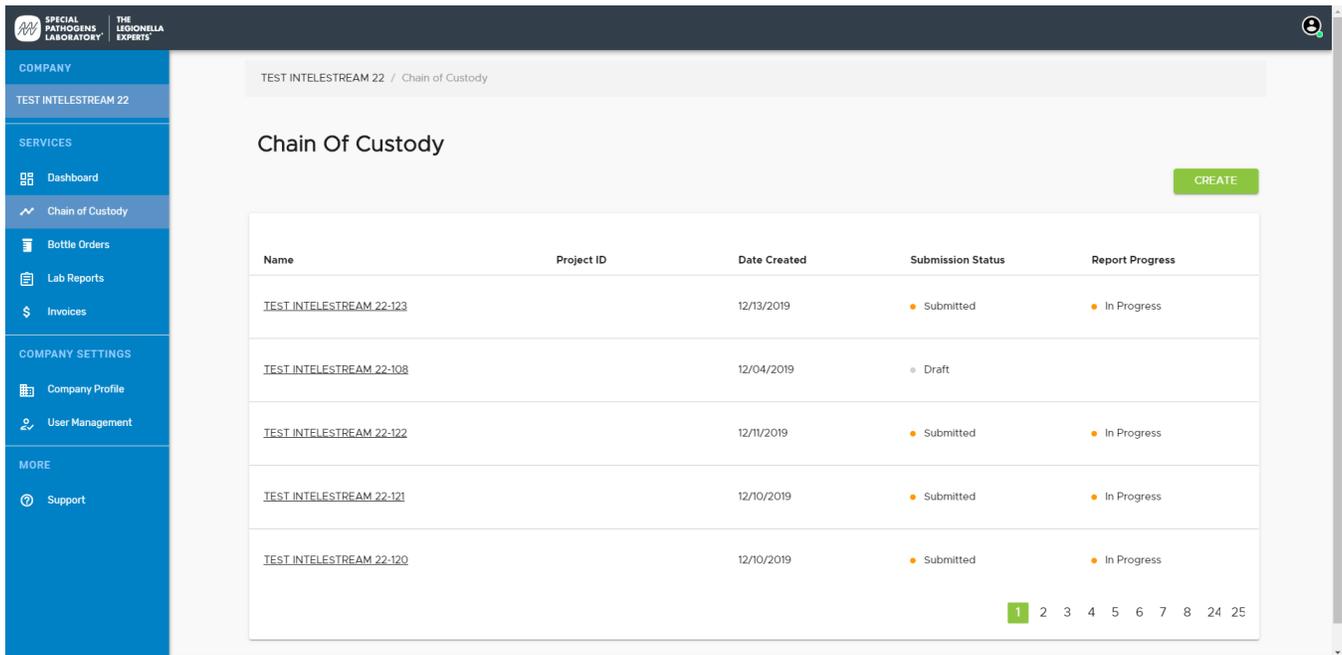
## Need help?

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# MySPL Portal: Getting Started

- *Enter Shipping Information:* Your company name, first name, last name, and phone number will be prepopulated with the information provided during registration.
- You can designate a different shipping contact and address by entering the address, city, state, and postal code of the location where the bottles should be shipped. Save your bottle order as a draft or submit.
- Submitted orders cannot be edited.

## Viewing, editing, and creating chains of custody



TEST INTELESTREAM 22 / Chain of Custody

Chain Of Custody CREATE

Name	Project ID	Date Created	Submission Status	Report Progress
<a href="#">TEST INTELESTREAM 22-123</a>		12/13/2019	Submitted	In Progress
<a href="#">TEST INTELESTREAM 22-108</a>		12/04/2019	Draft	
<a href="#">TEST INTELESTREAM 22-122</a>		12/11/2019	Submitted	In Progress
<a href="#">TEST INTELESTREAM 22-121</a>		12/10/2019	Submitted	In Progress
<a href="#">TEST INTELESTREAM 22-120</a>		12/10/2019	Submitted	In Progress

1 2 3 4 5 6 7 8 24 25

View, edit, and create chains of custody by clicking **Chain of Custody** in the sidebar. Only Chains of Custody in draft status can be edited; Chains of Custody cannot be edited after submission. The Project ID, Date Created, Submission Status (draft, submitted, received), and Report Progress are displayed.

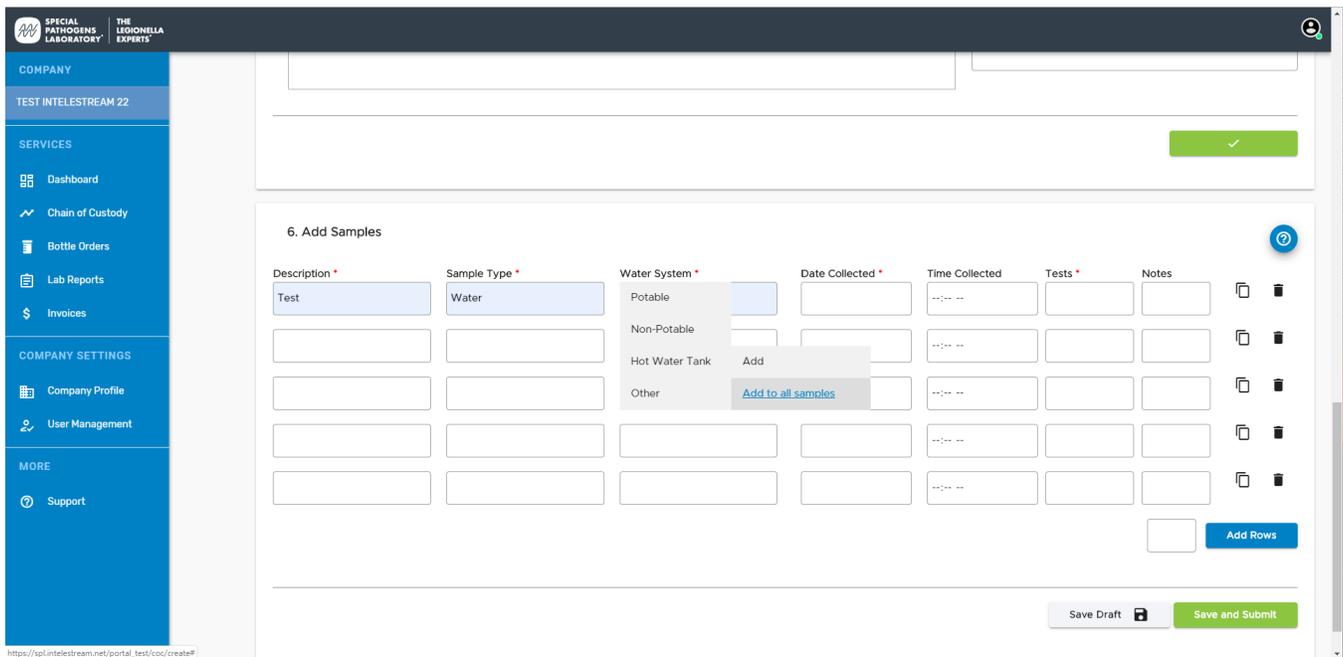
- To view and edit Chains of Custody, click the Chain of Custody link in the Name column. To create a new Chain of Custody, on the Dashboard, click **Start Chain of Custody** under **Quick Links** and enter your data.
- *Account Information:* Your account name and number will be prepopulated from your company profile.
- *Collection Information:* Enter the name of the person that collected samples.
- *Sample Information:* Select Yes or No and additional information if prompted (required).

## Need help?

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## MySPL Portal: Getting Started

- *Type of Water Collected:* Select **Yes**, **No**, or **Not Applicable** (required).
- *Optional Information:* Optional information includes: Project Identifier, PO Number, Tracking ID, General Comments, and Tracking ID.
- *Add Samples:* Enter the total number of samples collected. This populates the number of rows to enter sample information. For each sample, enter a Description, select a Sample Type, Water System sampled, Date Collected, Time Collected (if applicable), Tests for that sample, and Notes.
- For each category, you can add your selection to the current sample or to all samples. You can also add more rows of samples by typing how many additional rows you need and clicking **Add Rows**.



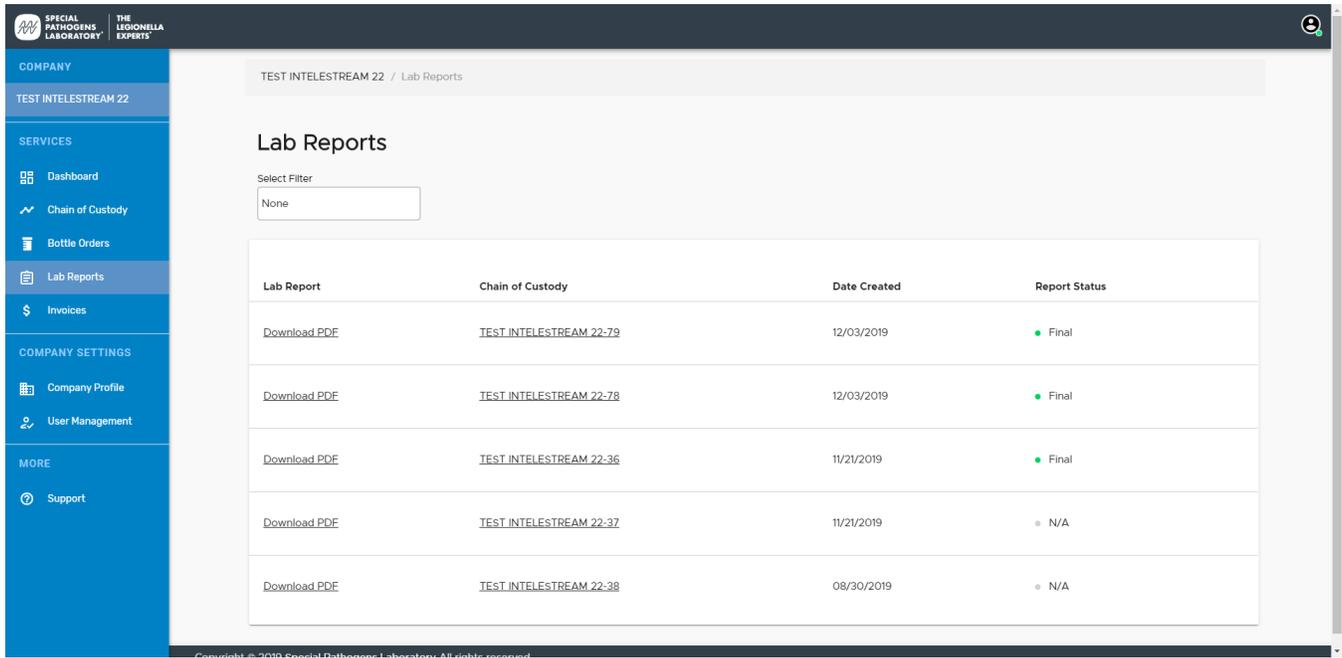
- *Save your Chain of Custody* by clicking **Save Draft** or **Save and Submit**. After you confirm your submission the Chain of Custody cannot be edited.
- *Add the confirmation number to your shipping container:* After your submission is confirmed, a confirmation number is displayed. Write this number on the sticker provided with your bottle order and place the sticker on your box before shipping your samples. This is the identifier that matches your submission to samples.

### Need help?

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# MySPL Portal: Getting Started

## Checking report status



The screenshot shows the MySPL Portal interface for 'TEST INTELESTREAM 22 / Lab Reports'. The left sidebar contains navigation options: COMPANY (TEST INTELESTREAM 22), SERVICES (Dashboard, Chain of Custody, Bottle Orders, Lab Reports, Invoices), COMPANY SETTINGS (Company Profile, User Management), and MORE (Support). The main content area displays a 'Lab Reports' table with a 'Select Filter' dropdown set to 'None'. The table lists five reports with columns for Lab Report, Chain of Custody, Date Created, and Report Status.

Lab Report	Chain of Custody	Date Created	Report Status
<a href="#">Download PDF</a>	<a href="#">TEST INTELESTREAM 22-79</a>	12/03/2019	Final
<a href="#">Download PDF</a>	<a href="#">TEST INTELESTREAM 22-78</a>	12/03/2019	Final
<a href="#">Download PDF</a>	<a href="#">TEST INTELESTREAM 22-36</a>	11/21/2019	Final
<a href="#">Download PDF</a>	<a href="#">TEST INTELESTREAM 22-37</a>	11/21/2019	N/A
<a href="#">Download PDF</a>	<a href="#">TEST INTELESTREAM 22-38</a>	08/30/2019	N/A

The Lab Reports table includes your report and the Chain of Custody linked to that report.

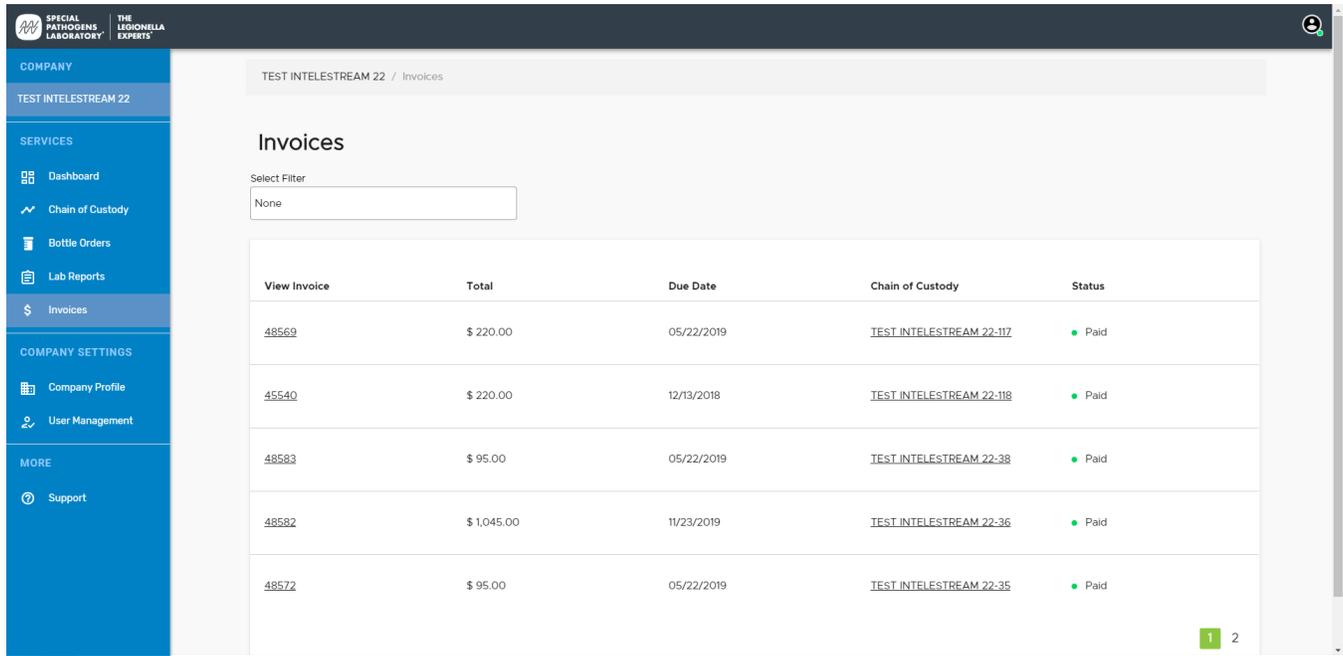
- Check the status of your lab report by clicking **Check Report Status** under **Quick Links** on your dashboard, or by clicking **Lab Reports** in the sidebar.
- Filter the lab reports by the name of the Chain of Custody or by the Date Created. Choose a filter from the **Select Filter** box.

## Need help?

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# MySPL Portal: Getting Started

## Making a payment



TEST INTELESTREAM 22 / Invoices

### Invoices

Select Filter  
None

View Invoice	Total	Due Date	Chain of Custody	Status
<a href="#">48569</a>	\$ 220.00	05/22/2019	<a href="#">TEST INTELESTREAM 22-117</a>	Paid
<a href="#">45540</a>	\$ 220.00	12/13/2018	<a href="#">TEST INTELESTREAM 22-118</a>	Paid
<a href="#">48583</a>	\$ 95.00	05/22/2019	<a href="#">TEST INTELESTREAM 22-38</a>	Paid
<a href="#">48582</a>	\$ 1,045.00	11/23/2019	<a href="#">TEST INTELESTREAM 22-36</a>	Paid
<a href="#">48572</a>	\$ 95.00	05/22/2019	<a href="#">TEST INTELESTREAM 22-35</a>	Paid

1 2

View invoices and make payments online by clicking **Make a Payment** under Quick Links on the dashboard or by clicking **Invoices** in the sidebar.

- To sort your invoices by Chain of Custody, bottle order, unpaid, or paid by choose a filter from the **Select Filter** box
- To make a payment, click the invoice number. In the View Payment window, click **Make Payment**.

## Need help?

Email [support@specialpathogenslab.com](mailto:support@specialpathogenslab.com) and enter MySPL in the subject line of your email or click **Support** in the left navigation menu in MySPL.