

**The Quinlan Companies**  
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## **QuinlanVault Tutorial**

*(please visit [www.quincos.com](http://www.quincos.com) for an updated version of this tutorial)*

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Welcome to QuinlanVault! This tutorial will provide an overview of the QuinlanVault application. Primarily, clients will use the QuinlanVault application to:

- Request records for delivery
- Generate inventory and request history reports

### **1. Introduction**

The QuinlanVault is an Internet-based application. Therefore, only an Internet connection and an Internet browser are required to use QuinlanVault. Some of the benefits of using an application that resides on the Internet include:

- Ability to use the application from any computer with an Internet connection
- No program or program updates to install
- Real-time access to inventory in storage at The Quinlan Companies
- User friendly interface and navigation

QuinlanVault can be found by following the link to QuinlanVault on [www.quincos.com](http://www.quincos.com), The Quinlan Companies' corporate Internet presence.

QuinlanVault is the same application that The Quinlan Companies uses to manage all client inventories, fulfill requests and deliveries, report on client inventories, and track billable activity. This allows clients to request records and manage inventories seamlessly alongside The Quinlan Companies use of QuinlanVault.

QuinlanVault employs 128-bit SSL encryption technology to protect data traveling to and from the application. We are a registered Thawte ([www.thawte.com](http://www.thawte.com)) secure site.

### **2. Password Protection and Privacy**

QuinlanVault is password protected. Usernames and passwords are distributed to each user and administered by the Information Technology Manager of The Quinlan Companies. Usernames and passwords allow the application to identify who is accessing the application and direct each user to the appropriate areas within QuinlanVault. Both usernames and passwords are not case sensitive.

If a password is lost, please contact the Information Technology Manager of The Quinlan Companies. A new password will be generated and given to the QuinlanVault contact at your organization.

Please see [www.quincos.com](http://www.quincos.com) for The Quinlan Companies' [privacy and security statement](#).

### 3. Using QuinlanVault for Record Requests

#### Navigation Basics

Clients can access two main screens within QuinlanVault:

- Request Screen
- Reports Screen

To log out, you may select the "logout" button on the top right of the screen. Please be aware that you are logged into the system until you select the "logout" button – even if you close the Internet browser or visit another web site. Logging out is critical to prevent others users from compromising the integrity of the system.

#### Logging In

Use your username and password to log into the system. If log in is successful, you will be sent directly to the Record Type Selection page, where your client number and name should be prominently displayed near the top of the page.

#### Record Type Selection and Non-Finalized Requests

On the Record Type selection page, use the record type drop down menu select which record type will be requested and click *Submit*. This drop down menu will only display Record Types that you have in storage with The Quinlan Companies. They include:

- XR – X-Ray Records
- MR – Medical and Miscellaneous Records
- BX – Boxed Records

If a non-finalized record request exists, this request will be displayed in a table directly beneath the record type drop down menu. If no non-finalized record requests exist, nothing will appear in this area.

#### Working with Non-Finalized Requests:

- A non-finalized record request is a request that has not yet been submitted for fulfillment.
- The following fields are displayed with each listing:
  - Request ID: a random unique ID number generated by the application
  - Record Type: the record type requested
  - Request Date: The date of the request
  - Requestor: The individual (username) responsible for the request as well as the user group that the individual belongs to
- Requesting a record that exists on a non-finalized record request will result in a *duplicate* request.
- Non-finalized requests should either be finalized or deleted as soon as all of the information is available to make this decision.
- **Please note:** Quinlan-generated and client-generated non-finalized requests appear in this area. You may view Quinlan-generated requests, but Quinlan should be contacted if you wish to either finalize or delete one of these requests.

## The Request Page

Once a record type has been selected, you will be sent to the record request page. Displayed underneath your client number and name should be the record type you have just selected. Below that, you will see a number of columns from which you may make a request. They include (some of these columns may not appear because they are not utilized by your account):

- Record ID
- Last Name (patient last name)
- First Name (patient first name)
- Initial (patient middle initial)
- Date of Birth (patient date of birth)
- Volume (record volume number)
- Last Activity Date (last medical examination of client)
- Box ID (box ID number)
- Box Sequence (equivalent to volume number for boxes)
- Box Description (description of contents of box)
- Cubic Feet (cubic footage of box)

Other columns exist on the request page. They are, in order:

- *Lot*. The lot column contains a drop down menu of existing lots (groups of records.) Lots are two digit numbers that usually correspond to the last activity date of the records being stored. The "Any" option, the default selection on the drop down menu, refer to all lots in storage for that file type. Lots are an important facet of the request process, which will be explained later.
- *Comment*. The comment field is a free form text box that does not query the database. This column is used to communicate information specific to that particular requested item to The Quinlan Companies' Record Librarians.
- *Urgent?* This check box is used to make an emergency request. Emergency Requests will be delivered under the Emergency Request provisions established between you and The Quinlan Companies. Emergency Requests will be explained later.
- *Status*. Indicates the status of the record being requested. Appears after the request has been made. Statuses include:
  - In – record is in storage at The Quinlan Companies
  - Out – record has been previously delivered
  - Not Found – record does not appear in the QuinlanVault inventory database
- *Location*. Indicates the location of the requested record in The Quinlan Companies' Record Library. For Quinlan use only.
- *Discard?* This check box is used to permanently remove the requested record from the request.

Action buttons appear at the bottom of the request page. They include:

- Submit Request. Submits request entries for database querying.
- Update Request. Updates any changes or amendments made to an existing request. May be used multiple times for one request until request is either finalized or deleted.
- Finalize Request. Submits request for fulfillment.
- Delete Request. Deletes entire request.

## Making the Request

Request records by entering record information into the appropriate columns. All information entered into the QuinlanVault database for your records in storage is able to be queried. Please speak with a Quinlan Companies representative regarding your query capabilities. Some querying notes:

- Querying by more than one attribute (Record ID, Last Name, etc.) is possible; however, query results will be returned only if **all** attribute entries for that record match those found in the database. We recommend querying by as few search terms as possible (usually, querying by just the Record ID attribute is most effective.)
- All results matching your query will be returned. For instance, if the query term "Smith" is used in the last name column, all patient records (that have been data entered into the QuinlanVault database) with the last name of "Smith" will be returned.
- QuinlanVault queries using compete strings, meaning that querying for Record ID "1234" will not return Record ID "12345"
- Queries are not case sensitive.
- Date queries must adhere to the posted date entry format.
- Lot Selection. When querying for a record, use the Lot drop down menu to either select a particular lot to search or select "Any" to search though all lots. It is recommended that "All" lots be searched through during the initial query.

### **Updating and Finalizing the Request**

Once an initial request query has been made, the results of the query will be returned. If a record is found, all attribute data (Last Name, Date of Birth, etc.) associated with that record will be displayed, including status and location.

At this point, individual record requests can be discarded by checking the corresponding "Discard?" check box and clicking "Update Request." Comments may also be added to the request.

### **Emergency Requests**

Clicking the "Urgent?" check box for a particular record request will flag that record as requiring an emergency delivery. Please only mark a record request as Urgent if it requires an emergency delivery. After making an Urgent request, please call The Quinlan Companies Record Library to conform the request. A pop-up window will appear after the request is made to remind you.

### **Multiple Lot Requests**

Record requests that are found in the QuinlanVault database (those with a status of In or Out) will appear with a defined lot in the Lot column. Those record requests that are not found in the database will appear having the status "Not Found." A select box containing the lots for that record type and a check box labeled "check selected lots" will appear in the Lot column.

QuinlanVault is designed so that only requests that have a defined Lot assigned to them can be submitted for fulfillment. If you would like to request a record that is not found in the QuinlanVault database (i.e. those that do not have a status of In or Out) you must select one or more (using the Ctrl or Shift keys) lots from the select box AND select the "check selected lots" check box.

Keep in mind:

- The Quinlan Companies Record Librarians will search for requested records only within the lots indicated in the request.
- Please use the comment area to indicate any information you would like to include with your request. Please note that this field should not be used to indicate multiple lot requests.
- A request with the status of "Duplicate" indicates that a request for that exact record has already been made and has not yet been fulfilled. Requests for "Duplicate" records should not be made.

- Requests for records with a status of “In” or “Out” can be made by entering the Record ID and selecting the lot(s) within which you would like the records to be searched for.

#### **4. Using QuinlanVault Reporting Functionality**

QuinlanVault allows its client users reporting functionality. The three reports available to clients include:

##### **Lot Detail Report**

- Use this report to:
  - Obtain summary of all lots in storage with The Quinlan Companies
  - Obtain record inventory per lot
- Query by:
  - Record Type
  - Lot
- Other features
  - Select data attribute columns (Last Name, Date of Birth, etc.) to include in report
  - Available in HTML and Microsoft Excel formats

##### **Record Detail Report**

- Use this report to:
  - Obtain status and request history of a particular record (captures transfers in and out of Quinlan records library)
- Query by:
  - Record Type
  - Record ID
  - Last Name
  - Date of Birth
  - Last Activity Date
- Other features
  - Select data attribute columns (Last Name, Date of Birth, etc.) to include in report
  - Available in HTML and Microsoft Excel formats

##### **Request History Report**

- Use this report to:
  - See all previous record requests
- Query by:
  - Date Range
  - Requestor
- Other features
  - Ability to sort by date or requestor
  - Available in HTML and Microsoft Excel formats

#### **5. Question and Answer**

If the following question and answer section does not satisfy your inquiry, please feel free to contact The Quinlan Companies for assistance.

- Can I access existing invoices or packing slips?
  - Not yet. We are working to make this functionality available in the near future.

- Can I share my password?
  - No. Passwords should never be shared. The Quinlan Companies recommends one username and password per user. See you QuinlanVault administrative contact regarding the issuance of new passwords.
- I keep getting a “The Page Cannot Be Displayed” error message when trying to connect to QuinlanVault. Why?
  - Make sure that your Internet connection is working properly. If the problem persists, please call
- I am experiencing extended periods of latency (delay) while using the QuinlanVault. Why?
  - Internet traffic does, from time to time, become delayed for any of a number of reasons. If you are experiencing periods of uncommon latency, the best solution is to return to the QuinlanVault at a later time to finish your session. If this is not possible, please contact The Quinlan Companies and we will investigate the incident.
- Are there any charges associates with using QuinlanVault?
  - Please speak with your Quinlan Account Representative.

## **6. The Quinlan Companies Staff**

### **The Quinlan Companies’ Record Library**

- (401) 461-0250

### **Account Representative**

#### **Northeast – Headquarters**

- Lissa Quinlan
  - (401) 480-3134
  - lissa\_quinlan@quincos.com
- Michael Cooley
  - (401) 529-4999
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#### **Southwest**

- Michael Cooley
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#### **Southeast**

- Deanna Vigliotta
  - (407) 256-8162
  - dvigliotta@quincos.com

#### **Mid-Atlantic**

- Jeffery Ruttenberg
  - (443)838-5842

### **For Technical Concerns**

- Denise Moriarty
  - (401) 781-6164
  - denise\_moriarty@quincos.com