

Client Portal Instructions

Addendum Section

www.geo-ces.com

Our client portal addendum section has these additional features:

 **Initiate change requests:**

Clients can request changes be made to addendums with automatic secure notification of all parties.

 **Multi-user Project and Addenda approval:**

Clients can view and initiate secure multiple approval rounds for clients representatives

 **Historical cross reference:**

Clients can compare current addendum with historical cross referenced data and site specific requirements



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Client Portal Instructions

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Client Portal Instructions

Login Instructions

Go to <http://www.geo-ces.com>. The "Client Portal" link is on the Geochemical Testing Home Page. It is located on the upper right-hand side. Click on "Client Portal" and the login screen will appear as below.

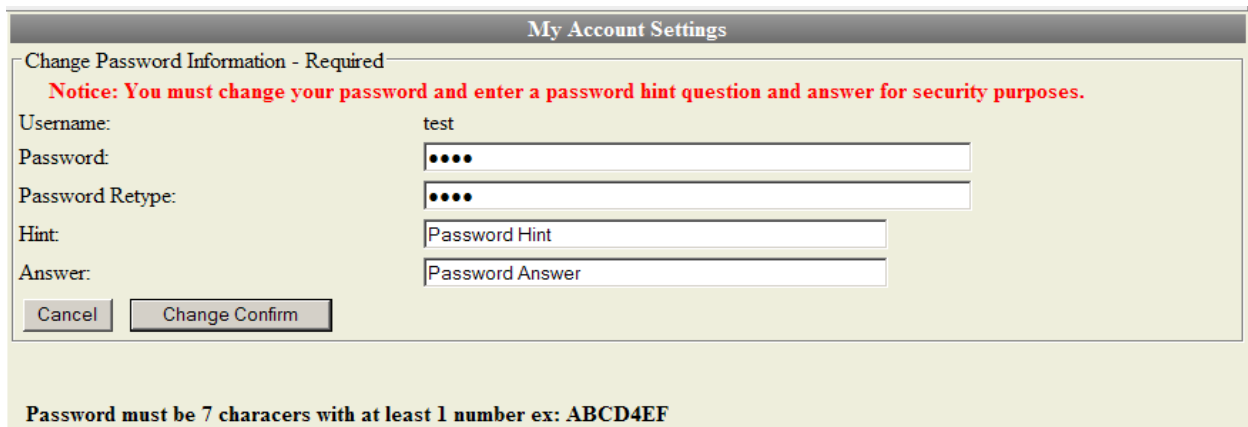
A screenshot of the Geochemical Testing login page. It features the company logo and name at the top left. Below the logo are two input fields: "User name:" and "Password:". A "Login" button is positioned below the password field. A blue underlined link "Forgot My Password" is located below the login button. At the bottom of the page, the copyright notice "Copyright © 2009 Geochemical Testing" is displayed.

PLEASE NOTE: The Client Portal system is best viewed in Internet Explorer 7. If you are using Internet Explorer 8 or 9, then click on the compatibility mode button to the right of the URL so that all of the functions in this system can be utilized.

Please enter the username and password that was sent to you in an email.

Change Password

After this first log-in, you will be asked to now change your password. Passwords must be a minimum of 7 characters long and contain at least one number. You are also required to create a hint question and answer. The hint and answer must not contain the password itself and the hint question and answer can not be the same.



My Account Settings

Change Password Information - Required

Notice: You must change your password and enter a password hint question and answer for security purposes.

Username: test

Password:

Password Retype:

Hint:

Answer:

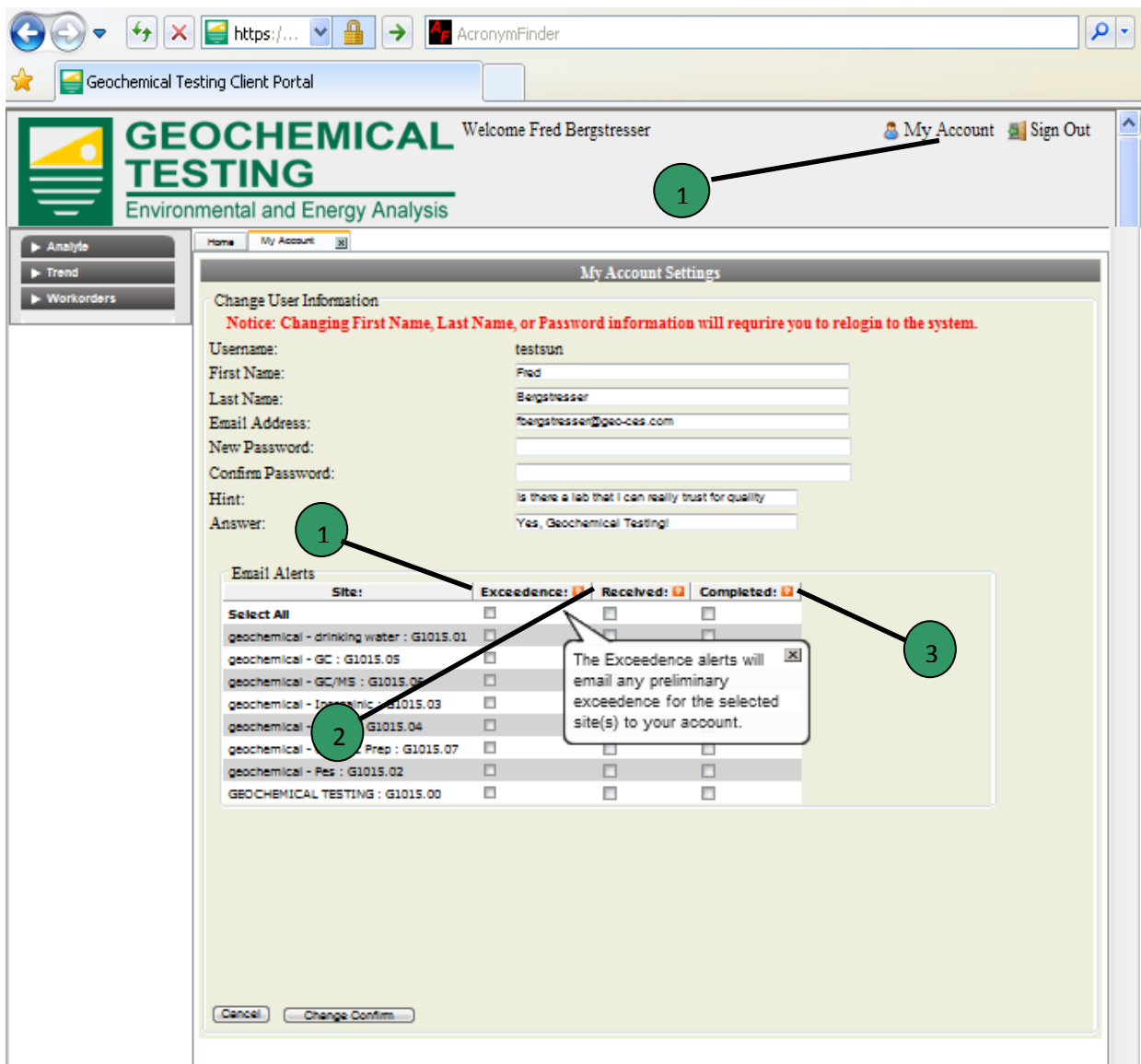
Password must be 7 characters with at least 1 number ex: ABCD4EF

After changing your password you will be re-directed to the login page to login with your new password. Upon logging in you will be taken to your home page.

Home Page – My Account

“My Account” page is where you can change vital information about your account. You can also sign up for the optional preliminary exceedence alerts, received alerts and completion alerts by checking the appropriate boxes that correspond with your various sites.

- 1 Just click on “My Account” in the upper right corner of the screen to access account settings:



Welcome Fred Bergstresser

GEOCHEMICAL TESTING
Environmental and Energy Analysis

My Account Sign Out

Home My Account

My Account Settings

Change User Information

Notice: Changing First Name, Last Name, or Password information will require you to relogin to the system.

Username: teststun
 First Name: Fred
 Last Name: Bergstresser
 Email Address: fbergstresser@geo-ces.com
 New Password:
 Confirm Password:
 Hint: Is there a lab that I can really trust for quality
 Answer: Yes, Geochemical Testing!

Email Alerts

Site:	Exceedence:	Received:	Completed:
Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
geochemical - drinking water : G1015.01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
geochemical - GC : G1015.05	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
geochemical - GC/MS : G1015.06	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
geochemical - Inorganic : G1015.03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
geochemical - G1015.04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
geochemical - Prep : G1015.07	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
geochemical - Res : G1015.02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GEOCHEMICAL TESTING : G1015.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Exceedence alerts will email any preliminary exceedence for the selected site(s) to your account.

Cancel Change Confirm

Notices and Alerts

In this section (previous page) you can also select to receive email alerts that are triggered by various scenarios.

- 1 A check in the Exceedence box will generate an email with any preliminary exceedences at the sites you have requested.

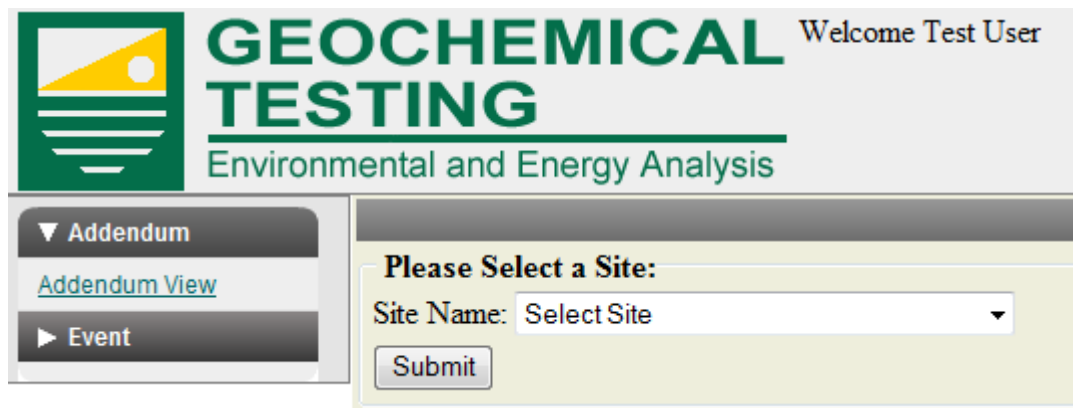
“TO GET ACCURATE EXCEEDENCE NOTICES; please supply us with your current permitted limits especially for NPDES (National Pollution Discharge Elimination System) discharge points. We use preliminary data to give you the earliest possible notice of an exceedence. This gives you advance warning but it could result you getting false positive notices. We review and verify the results as soon as the supporting information is available.”

- 2 A check in the Received alerts box will generate email for all WorkOrders received for the given day for the selected site(s). This email will also include the analysis for which the WorkOrder is logged.
- 3 A check in the Completed alerts box will email all WorkOrders completed for the given day for the selected site(s). This email will also include warnings if exceedences are found for the completed WorkOrders.


Those with multiple sites checked will get one email message containing alerts from all sites.

Addendum View

On the home page or any page with the drop down navigation list click on the Addendum tab then choose Addendum View. Select a Site from the drop down list and click on the submit button.



Once you have selected a site you will see the status of any pending addendums that need to be reviewed. You can also view previously approved addendums by selecting either the "Approved" or "Both" radio buttons.

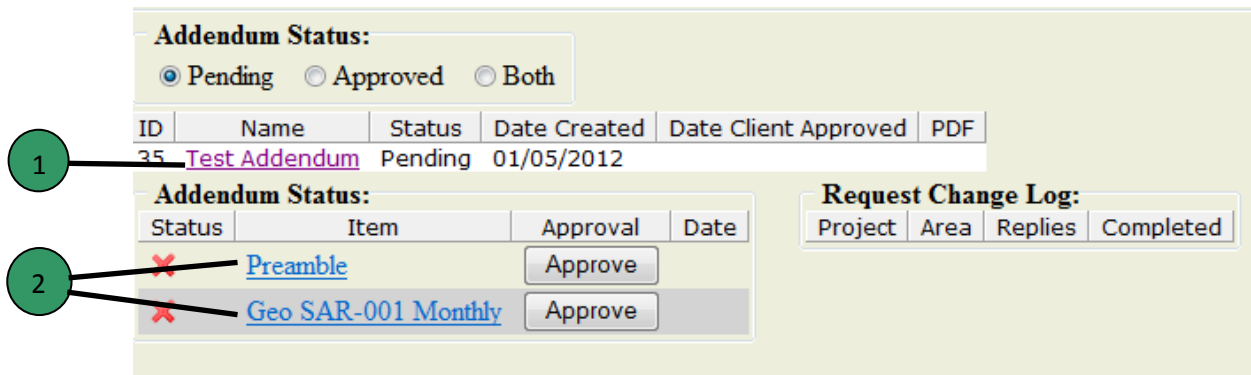


ID	Name	Status	Date Created	Date Client Approved	PDF
35	Test Addendum	Pending	01/05/2012		

You are now able to click on the addendum you are interested in to access it.

Addendum Status

- 1 A list of all the projects (and preamble if applicable) associated with this addendum can be accessed by clicking on the blue addendum name.



- 2 Once the addendum name is clicked you will see the individual parts and their status listed. In this screen you will see the status of the individual parts of the addendum as well as an overview to any Requests that have been submitted.

Each Project line requires separate approval and once approved will change the status from a red  to a green  as well as include the name of the approver and date.

NOTE: Any *request for changes* on a project *must be closed* prior to being approved.

NOTE: If a preamble has been created it must be the last item to be approved.






NOTE: The approval process is detailed later in this document.

Addendum Details

You can drill into the project or preamble details by clicking on the blue link that contains the project or preamble name.

NOTE: The displaying of the details page can take some time depending on how large the project is and if there are historical addenda to cross reference. Historical cross referenced is detailed later in this document.

After clicking the project you will see a listing of methods and analytes down the left side of the screen and the monitoring points to the right.

Method	Description	Reporting Limit	Units	Qualifier	Subcontracted	MDL (Laboratory) Method Detection Limit	PQL (Laboratory) Practical Quantitation Limit	SAF-001
Monitoring Description								
Frequency								M
Count								
 EPA 200.7	Antimony	0.02	mg/L	- N		0.01	0.02	M
 EPA 200.7	Arsenic	0.02	mg/L	- N		0.01	0.02	M
 EPA 200.7	Beryllium	0.001	mg/L	- N		0.0005	0.001	M
 EPA 200.7	Cadmium	0.002	mg/L	- N		0.001	0.002	M
 EPA 200.7	Chromium	0.01	mg/L	- N		0.005	0.01	M

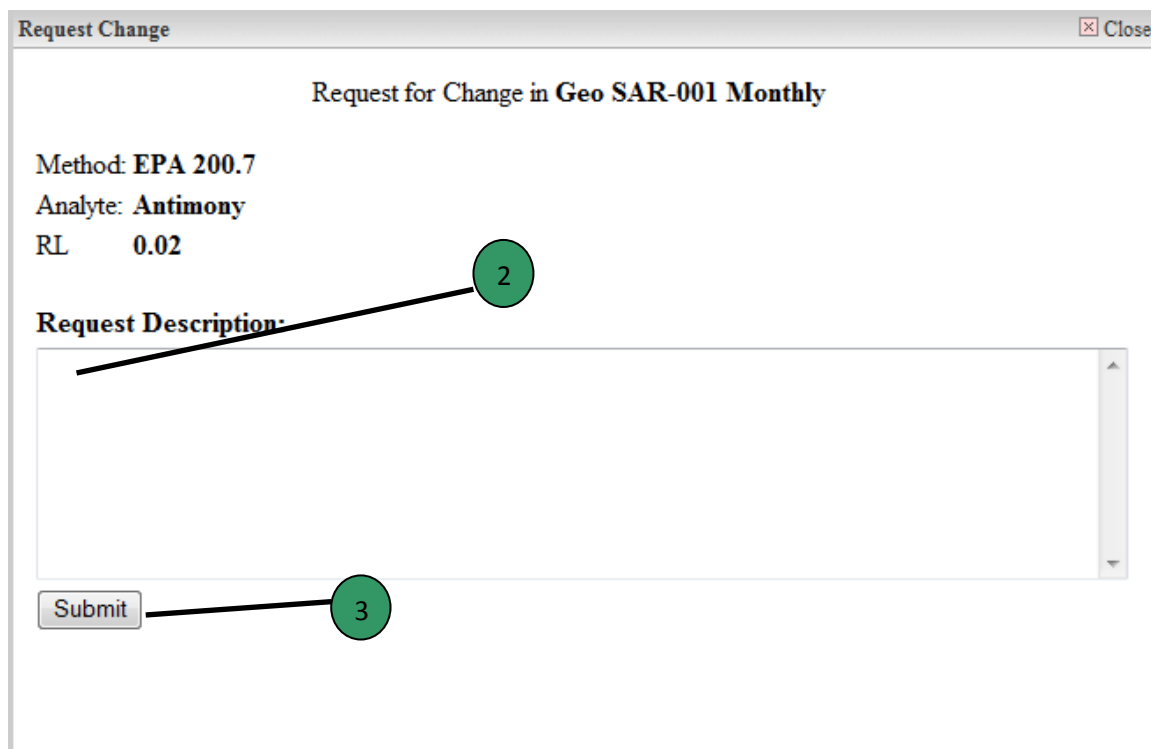
Across the top you will see Method, Description, Reporting Limit, Units, Qualifiers, whether or not the test is subcontracted, MDL, PQL, Holding Time, Total Annual Testing based on the frequency, and the associated costs per test.

Request for Changes

- 1 You can request changes to any of the methods and analytes by clicking on the question mark icon next to the line where you need to make the change.

Once clicked, an overlay screen will appear that will list the method, analyte and reporting limit of the line item.

- 2 Enter your request in the Request Description box and then click submit.



Request Change Close

Request for Change in **Geo SAR-001 Monthly**

Method: **EPA 200.7**
Analyte: **Antimony**
RL **0.02**

Request Description:

Submit

- 3 When you click submit, an email is sent to client support as well as to your own email account and entered in the change request log.

Once a request has been made it will be shown on the addendum status page and in the detail page at the requested line item.

Request Change Log:			
Project	Area	Replies	Completed
Geo SAR-001 Monthly	Antimony	0	<input type="button" value="Close"/>

Geochemical Testing client support will either make the change requested or request more information. Either response will generate another round of emails to all parties.

The red exclamation point shown below designates a request has been made on this line item. You can view the request and add additional comments by clicking on the red exclamation point as long as the request has not been closed

		EPA 200.7	Antimony
-------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------	-----------	----------

The red exclamation will become visible when the screen refreshes. To refresh the screen just click on the appropriate addendum name again.

Addendum Status:					
<input checked="" type="radio"/> Pending <input type="radio"/> Approved <input type="radio"/> Both					
ID	Name	Status	Date Created	Date Client Approved	PDF
35	Test Addendum	Pending	01/05/2012		

Closing Change Requests

Once your request has been changed to your satisfaction you can close the request in the addendum status area called "Request Change Log".

- 1 Simply click on the close button.

NOTE: All requests for a project or preamble must be closed prior to final approval.
NOTE: If you do not see a request that you just made simply click on the addendum name to refresh the screen.

Request Change Log:			
Project	Area	Replies	Completed
Geo SAR-001 Monthly	Antimony	0	<input type="button" value="Close"/>

A green check will appear in the Completed column when the request has been closed. If you later require changes to the line item after a request has been closed you can still make a new request again on the same line item.

Project Approval

- 1 To approve a project in the addendum simply click on the approve button in the addendum status screen.

Addendum Status:


Status	Item	Approval	Date
✗	Preamble	Approve	
✗	Geo SAR-001 Monthly	Approve	

NOTE: All change requests for a project or preamble must be closed prior to final approval. A preamble must be approved last in the addendum. Any pending requests will keep the projects open due to changes that could affect the final cost and scheduling of the final addendum.

- 2 Once an addendum has been completely approved it will move into the “Approved” section of the addendum status screen.

Addendum Status:

Pending
 Approved
 Both

ID	Name	Status	Date Created	Date Client Approved	PDF
35	Test Addendum	Approved	01/05/2012	01/05/2012	

- 3 Only fully approved addendums will have the ability to be made into a PDF file for you reference.

When a project or preamble is approved the data is stored in a historical database that is used for cross reference in future addendums.

Historical Cross Reference

Geochemical Testing’s online addendum system will automatically cross reference the most recently approved addendum, if one exists, so you can visually see any changes made to the current project based on the previously approved addendum. Over the years the historical reference system will build a large accessible database.

If there are multiple approved addendums you can change which one is used for cross reference by selecting it in the drop-down list when viewing the project details. The drop-down list will be located between the addendum status section and the project details. This way you can compare directly against various historical periods.

Addendum Status:

Status	Item	Approval	Date
✘	<u>Geo SAR-001 Monthly</u>	Approve	

Historical Comparison Test Addendum - 01/05/2012 ▼

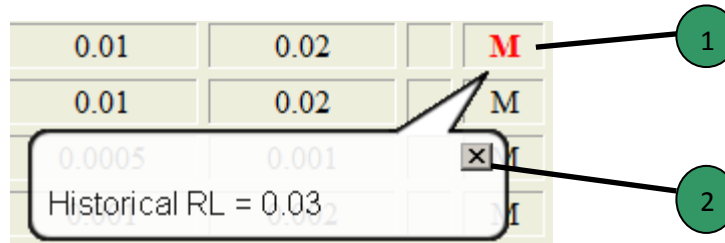
Geo SAR-001 Monthly

- 1 If the system detects a difference between the current project and a previously approved project it will be shown in the frequency section of the project details as a bold red font. (**M**, **S**, or **A**)

Description	Reporting Limit	Units	Qualifier	Subcontracted	MDL (Laboratory) Method Detection Limit	PQL (Laboratory) Practical Quantitation Limit	SAR-001
							M
Antimony	0.02	mg/L	-	N	0.01	0.02	M

- 1 To display the values from the historical cross reference, “mouse over” (put your cursor over) the bold red frequency notation and the value will be displayed.
- 2 The mouse over box is designed to remain in place, so if you want to move to a different discrepancy simply click on the “X” in the mouse over box.

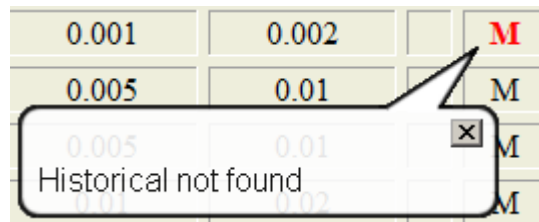
0.01	0.02		M
0.01	0.02		M
0.0005	0.001		M
Historical RL = 0.03			M



The historical cross reference program will check against the MDL, PQL, RL and Cost values.

Geochemical Testing’s cross reference system will also find any new monitoring points or additional analysis added and note them as “Historical not found”.

0.001	0.002		M
0.005	0.01		M
0.005	0.01		M
Historical not found			M



If there have been any current parameters removed when compared to the historical addendum they will be listed in red at the bottom in the area following the project listing.

The following sampling points and tests were found in the historical project, but not in the current project.			
Sampling Point	Method	Analyte	RL
SAR-001	SM4500-CO2D	Bicarbonate	5



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Maximum Contaminant Level MCL

Many states specify a maximum contaminant level. These contaminant levels can trigger an exceedance notice which you can set on your "My Account" page. The MCL button on the main addendum page can be used to display and export all information in spreadsheet form with the MCL listed per analyte just as the MDL and PQL are listed in the main addendum documents. The exported information can be adjusted deleted and formatted according to your needs. Please be patient as all the information downloads.



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Help / Questions

If you have any questions regarding the use of this portal or have any suggestions on how we could modify or enhance it to better suit your needs, please contact your client support representative by calling (814) 443-1671 or by contacting Brad Bergstresser bbergstresser@geo-ces.com. Please let us know if you encounter any errors or broken links in the portal so we can correct them as soon as they are discovered. We are in the process of adding many new features so if you have a suggestion for a particular modification we could probably channel it into our current programing. Tell us what you need, we will try to find a way that we can provide it for you.



Please visit our website at www.geo-ces.com