



## Panhandle Employers Services, Inc.

Includes information from DrugPak, LLC

Revised: June 21, 2018

# Client Portal Guide

In Screenhubb

“PES” Version 1.2

PES thanks all of you for sticking with us through this transition into our new online system, Screenhubb / DrugPak Web. We understand that it has been a learning curve for all.

Please know that we often navigate through Client Portal so that we can “walk in your shoes” and try to understand how it’s doing on your end. We are speaking on your behalf to make your online experience in our new system easier & more user-friendly.

**BE SURE** to check back here for updates to this “Client Portal Guide”. There will be more to come.



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# Client Portal Guide

In Screenhubb

PES Version 1.2

## Setup

1. You will receive an email with a temporary password and a link to your client portal page.



Joe Contact, your user account is ready!

Please click [here](#) to verify your email and activate your account.

Your password has been reset.

Your username is: **jcontact@email.com**

Your current password is: **r5}flfarjc**

You will be prompted to change this the first time you login.

This is an automated system message about your Screenhubb Client Portal account.

2. Click the blue “here” link to open Client Portal. The system will request that you change your password. Enter the temporary password provided in the email into the “Current Password” field. In the example above the “Current” password is “**r5}flfarjc**”. Enter your new password in the “New Password” field, and type it again in the “Repeat Password” field to verify your new password. Click the blue button labeled “Change Password” to set your password.

## Change Password

To complete your password change enter your new password below

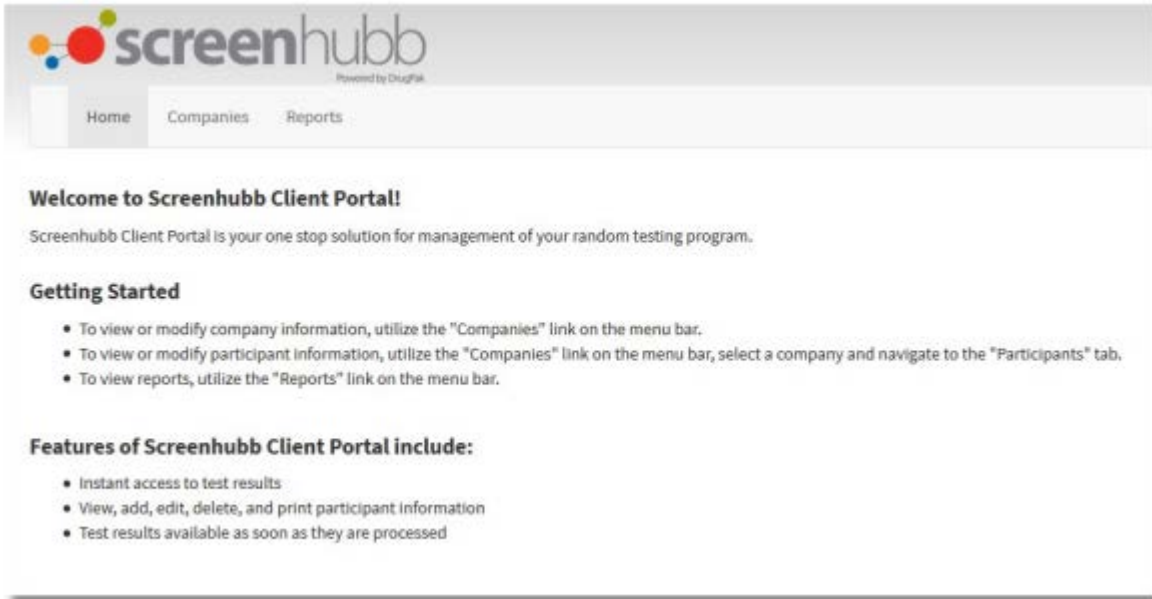
Current Password:

New Password:

Repeat Password:

Change Password

3. The “Welcome to Screenhubb Client Portal” window will be displayed.



## Login

1. Go to the following web address: <https://secure.screenhubb.com> .
2. Place your credentials into the “Login” section and click the blue “Login” button to display the Screenhubb Welcome screen.

The screenshot shows a login form with the following elements: a title 'Login', an 'Email:' label above a text input field containing 'txcontact@email.com', a 'Password:' label above a text input field containing '\*\*\*\*\*', a link 'Forgot your id/password?' below the password field, and a blue 'Login' button at the bottom with a mouse cursor hovering over it.

3. Click the “Companies” Tab to display your company information.

screenhub  
Powered by DrugPat

Home Companies Reports

Company List

Allison's Trucking (A-123456)  
Aztec New Mexico, 87410  
(465) 456-5465

Number Per Page 10

4. Click the “Reports” tab to display the “Available Reports” and the “On Demand” reports tabs.

Available Reports On Demand

Generated	Report Name	
5/26/2017	Notification Letters	Download
5/26/2017	Notification Letters	Download
5/26/2017	Notification Letters	Download
5/26/2017	Notification Letters	Download
5/22/2017	Notification Letters	Download
5/22/2017	Notification Letters	Download
5/22/2017	Notification Letters	Download

Available Reports On Demand

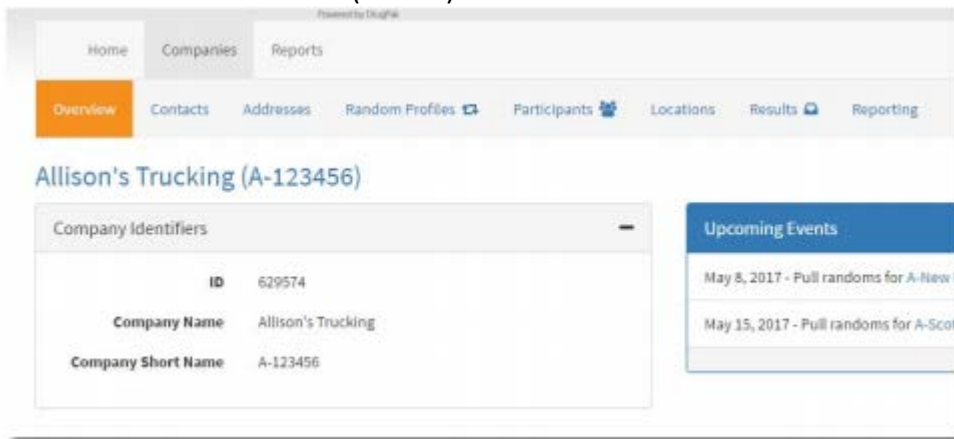
Name	Description
Certification Letter	Generates letter certifying enrollment in random selection.
Companies In Group	Generates list of companies in a group
Companies List	Generates Companies List
Eligible Pool	Generates an eligible pool list report
Follow Up Testing Report	Generates a List of upcoming follup tests for a company
Groups List	Generates Groups List

## Company Page

1. Click the “Companies Tab”. This will display all the companies you have access to view. Click on the company name (blue).



2. The “Company Detail” tab will be displayed. The user can view/change/add the following:
  - Contacts (whom PES may communication confidential information to);
  - Addresses
  - View Random Profiles
  - Participants (Employees)
  - Locations (if applicable)
  - View Results (search)

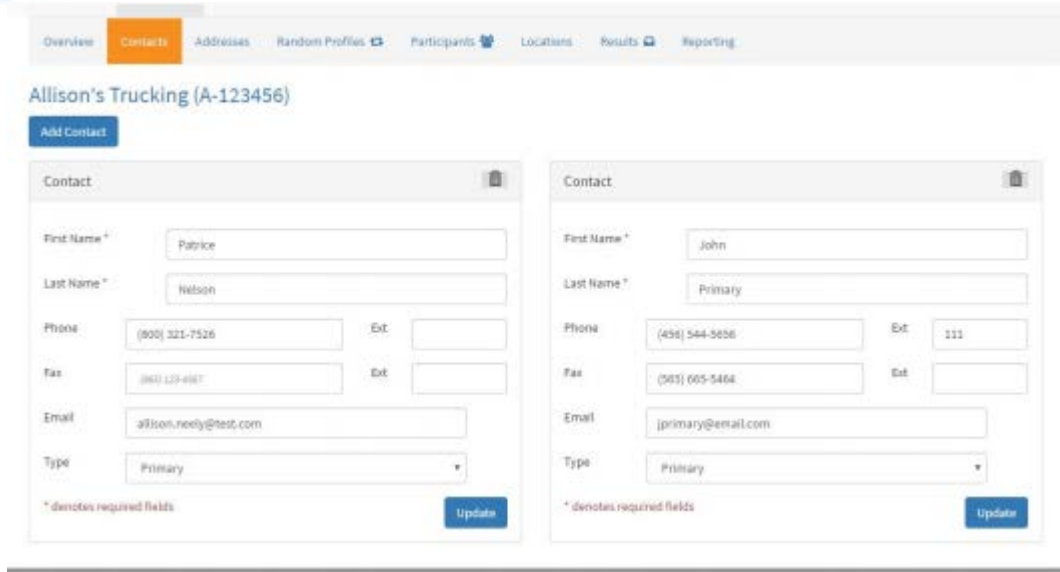


### Company's Contacts

Contacts are your company's designated personnel that PES may correspond with regarding confidential information. Contacts can be modified in your account in here Screenhubb. However, if you make any major changes, such as deletions or additions, notify PES at [policy@panhandleemployers.com](mailto:policy@panhandleemployers.com) as well to ensure complete security of your program and for “report” management.

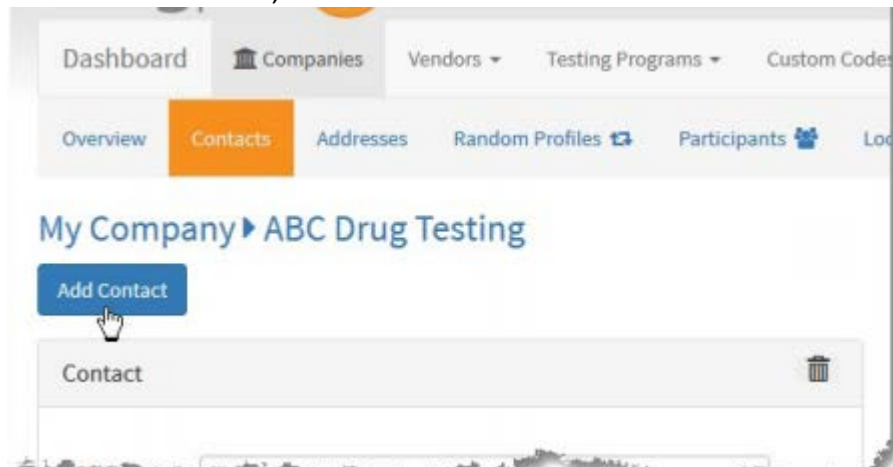
1. Click the “Companies Tab”. This will display all the companies you have access to view.
2. Click on the company name (blue) to display the “Company Page”.

3. Click the <Contacts> tab. The Contacts for this company will be displayed.



### Company's Contacts – Add

1. To add a contact, click the “Add Contact” button.



2. The “Add Contact” prompt will be displayed. Enter the following information into the provided fields (example below):

- a. <Name> - Contact’s full name (required data);
- b. <Phone> - Contact’s phone number and extension if applies;
- c. <Fax> - Contact’s facsimile number and extension if applies;
- d. <Email> - Contact’s email address (required if receiving PES notices/reports);
- e. <Type> - Contact Type – Use the selection box to choose from the following choices: Primary, DER, Secondary DER, Account Rep, Additional, Billing Rep or Customer Service Rep;
- f. <Client Portal> - Client Portal access - if contact is to receive PES notices/reports or needs to have login access to (Screenhub) Client Portal, send email request to [policy@panhandleemployers.com](mailto:policy@panhandleemployers.com) for PES to allow contact access.



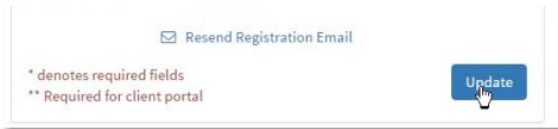
The screenshot shows a contact form with the following fields and values:

- First Name \***: John
- Last Name \***: Primary
- Phone**: (456)544-5656, **Ext**: 111
- Fax**: (565)665-5464, **Ext**: (empty)
- Cell**: (546)546-5654
- Email \*\***: jprimary@email.com
- Type**: Primary (dropdown menu)

3. Click the “Save” button to add the new contact. If the contact was successfully added, the information will be displayed in the fields and you will then have an “update” button displayed.

### Company’s Contacts – Change Information

1. Click into the field of the contact that you wish to change. In the example below, the email address will be changed.
2. Replace the current information in the field with the new or updated information.
3. When all information has been updated, click the “Update” button. This will save any changes made to this contact.



### Company’s Contacts – Delete

To ensure complete security of confidential information, be sure to send PES an email notice of contact deletion to [policy@panhandleemployers.com](mailto:policy@panhandleemployers.com).

1. Click the *Trash Can* icon in the upper right of the contact window to be deleted (see below).

2. The system will ask you, “Are you sure you want to delete this contact?”. Click “Yes” to delete or “No” to cancel the delete and return to the contact window.

### Company’s Address(es) – Display

1. Click the “Companies” Tab to display your Company information.



2. Select the company by clicking the name in the “Company List” window.
3. The “Company Page” will be displayed. Click the <Addresses> tab (see below).

### Company’s Address(es) – Add

1. To add an address, click the “Add New” button in the “Addresses” window (see below).

Overview Contacts **Addresses** Random Profiles Participants Local

Allison's Trucking (A-123456)

Add New

Business

Line 1 \* 1253 Broadway

Line 2

Postal/Zip Code \* 87410

City \* Aztec

State New Mexico

Country United States

Phone (465) 456-5465

Fax (854) 566-5465

Type Business

Set as default address

Update

2. The “New Address” prompt will be displayed. Enter the following information in to provided fields (example below):

- a. <Line 1> - Street address (required data);
- b. <Line 2> - Additional street address;
- c. <Postal/Zip Code> - Your zip code or postal code for a non-US address (Required data) –

*NOTE: once Zip is entered, the City, State & Country fields will automatically be completed.*

- d. <Phone> - Location phone number;
- e. <Fax> - Location fax number;
- f. <Type> - choose from 2 different types of addresses following:
  - i. Billing – (always default) this is your main address that is required because it is where you will receive your bill from Panhandle Employers Services (PES);
  - ii. Shipping – this is your physical address for (courier) to deliver drug testing supplies. If you ever receive testing supplies, this address cannot be a Post Office Box.

3. To set this address as your company’s “default address”, click the checkbox next to, “Set as default address”.

New Address

Line 1 \* 1255 Broadway

Line 2

Postal/Zip Code \* 87410

City \* Aztec

State New Mexico

Country United States

Phone (465)456-5465

Fax (654) 566-5465

Type Business

Set as default address

Save

4. To save the new address, click the “Save” button and the new address is added.

### Company’s Address(es) – Change

1. Click into the field of the address record to be changed.
2. Once you have clicked into the field, standard edit functions will then apply. Make changes to the field and press the <Tab> key on your keyboard.
3. Click the “Update” button associated with this address modified to save the changes.

Allison's Trucking (A-123456)

Add New

Business

Line 1 \* 1244 North Street

Line 2

Postal/Zip Code \* 87410

City \* Aztec

State New Mexico

Country United States

Phone (465) 465-6546

Fax (456) 465-4054

Type Business

Set as default address

Update

Business

Line 1 \* 1255 Broadway

Line 2

Postal/Zip Code \* 87410

City \* Aztec

State New Mexico

Country United States

Phone (465) 456-5465

Fax (654) 566-5465

Type Business

Set as default address

Update

## Company's Address(es) – Delete

1. Find the Address Record to be deleted in the address window.
2. Click the *Trash Can* icon in the upper right of the record display window. NOTE: when you hover your cursor over the *trash can* icon, it will change from color blue to orange.

The screenshot shows a 'Business' address form with the following fields and values:

- Line 1: 1233 Broadway
- Line 2: (empty)
- Postal Zip Code: 07410
- City: Aztec
- State: New Mexico
- Country: United States
- Phone: (405) 450-5485
- Fax: (504) 555-5485
- Type: Business

There is a checkbox labeled 'Set as default address' and a 'Submit' button at the bottom right.

3. The system will prompt, “Are you sure you want to delete this address?”. Click the “Yes” to delete the address record. Click “No” to abort the delete operation.
4. If the deletion was successful, the system will display “Address Removed” confirmation message. Click the “Close” button to clear the message.

## Random Profiles – your Company's Random Selection pools

1. From the Company Page, click the “Random Profiles” tab. This will display a summary of all the random profiles pulled for your company.

The screenshot shows the 'Random Profiles' tab for 'Allison's Trucking (A-123456)'. The table below contains the data:

Profile	Type	Cycle	Last Pull	Next Pull
A-New DOT (A-NY DOT Consortium)		Quarterly	Mar 6, 2017	May 8, 2017
A-Scotts New Profile (Scott Consortium)	Testing	Weekly	May 8, 2017	May 15, 2017
Allison's Trucking Random Profile (Allison's Trucking)	DOT	Quarterly	Apr 1, 2017	Jul 1, 2017
Oasis Park's DOT (Allison's Trucking)	DOT	Quarterly	Apr 2, 2017	Jul 2, 2017

The Participant Page your entire list of Participants, including Active and Terminated Participants.

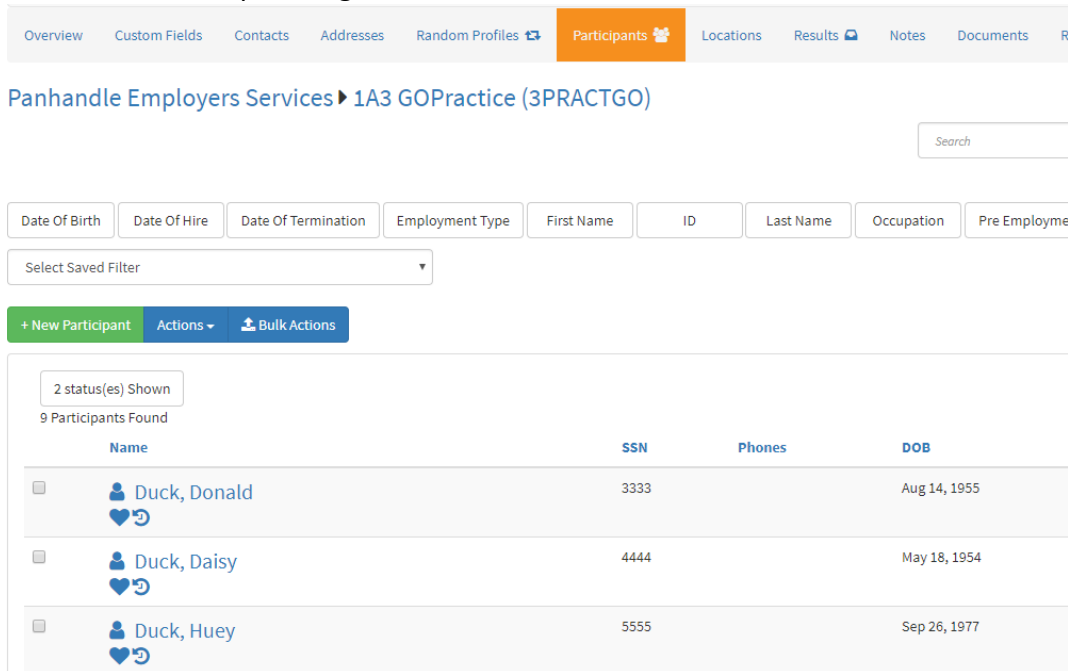
Continue in this Participant section for tips on quick search of Participant(s).

1. Click the “Companies” tab on the menu bar.



2. Select the company by clicking the name in the Company List window. The Company Page window will be displayed.
3. Click the <Participant> tab to display the “Participant Page”. Note: Once the “Participant” tab is selected, the tab will be highlighted orange.

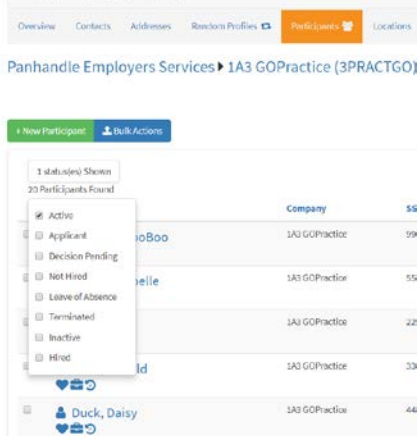
This is the “Participant Page”.



Name	SSN	Phones	DOB
<input type="checkbox"/> Duck, Donald 	3333		Aug 14, 1955
<input type="checkbox"/> Duck, Daisy 	4444		May 18, 1954
<input type="checkbox"/> Duck, Huey 	5555		Sep 26, 1977

1. Click the “Statuses Shown” button (above the Participant list) & uncheck all participant statuses that you do not want to show in the Participant List.
2. Then click the “Statuses Shown” button again to remove the checkbox menu.

Example below is going to only provide Active Participants in this listing.



### New Participant (Add Employees)

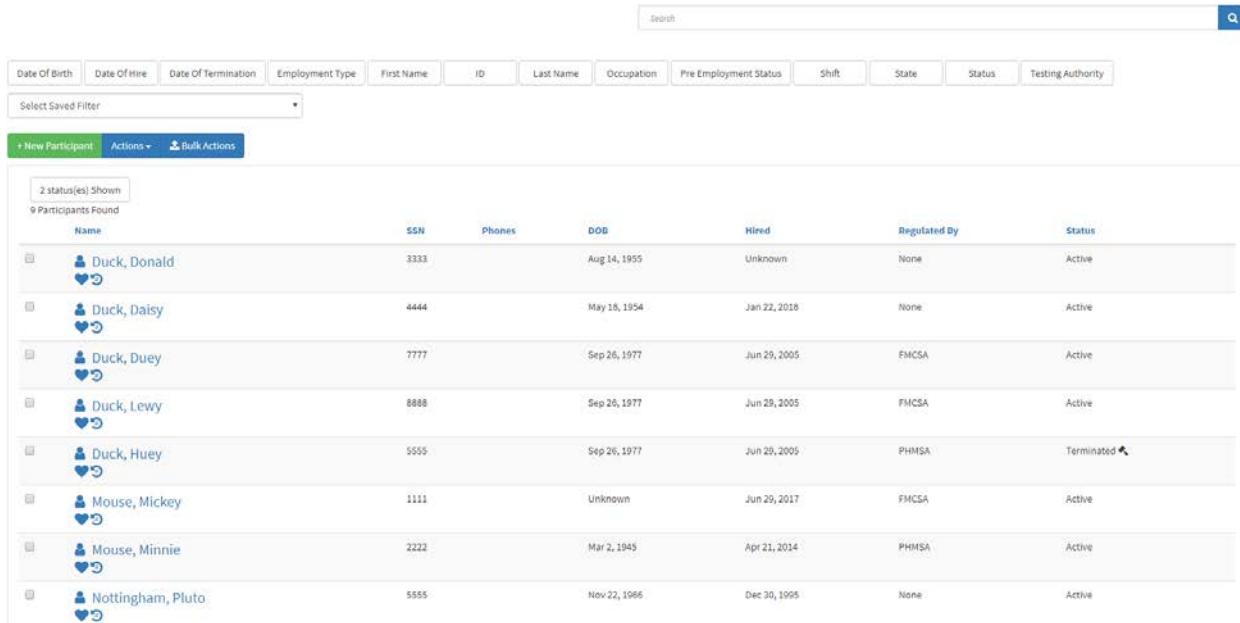
- DO NOT add New Participants or Employees.
  - A New Participant page is automatically created for employee(s) whose results arrive from taking a Pre-employment drug test.
  - The New Participant or Employee MUST take Pre-employment testing to be added. This stands for either DOT Regulated employees or Non-Regulated employees.
  - Employees that have been TERMINATED longer than 30 days must re-take a Pre-employment drug screen to be added back.
1. If the New Participant needs testing, completed an “Authorization Form” & send to collection site for required Pre-employment testing.

**\*NEW “Authorization Forms”** – Haven’t received an “Authorization Form” since March – 2018?  
Send us an email requesting your company’s NEW “Authorization Form” to [policy@panhandleemployers.com](mailto:policy@panhandleemployers.com).

2. To “find” a Participant that you believe has taken required Pre-employment testing, continue in this Guide to the Participant Search section.

In the “Participant Overview” window (below), this page (or pages) will contain the entire list of your company’s participants, including those that are *active* as well as those that have been *terminated*.

In the example Participant List below, the status column (far right-side) shows that all Participants are active except for Huey Duck is terminated.



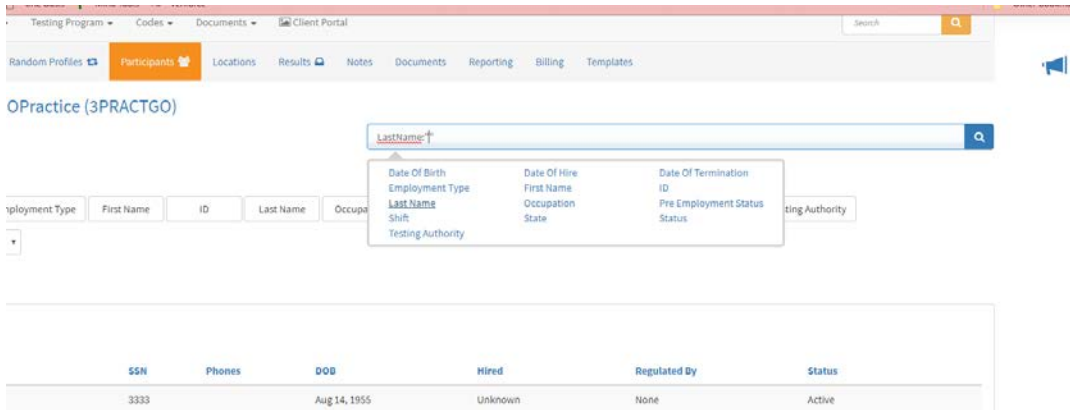
1. To view the filters to search by, hover your cursor over the search field to show the following filters:

Date of Birth  
 Employment Type  
 Last Name  
 Shift  
 Testing Authority

Date of Hire  
 First Name  
 Occupation  
 State

Date of Termination  
 ID  
 Pre-employment Status  
 Status

2. While your cursor is still in search box, click on filter. For this example below, the filter chosen is “Last Name”.







- The filter chosen will appear in the search box followed by parenthesis with your cursor in the middle of the parenthesis.
- In between the parenthesis, type the Participant's information to search by. The example below shows Participant's Last Name: "Mou" to search by & two Participants are shown that meet the filter criteria given.

Panhandle Employers Services > 1A3 GOPractice (3PRACTGO)

LastName:"Mou"

Date Of Birth	Date Of Hire	Date Of Termination	Employment Type	First Name	ID	Last Name	Occupation	Pre Employment Status	Shift	State
Status	Testing Authority	Select Saved Filter								
+ New Participant Actions Bulk Actions										
2 status(es) Shown 2 Participants Found										
Name	SSN	Phones	DOB	Hired	Regulated By	Status				
Mouse, Mickey	1111		Unknown	Jun 29, 2017	FMCSA	Active				
Mouse, Minnie	2222		Mar 2, 1945	Apr 21, 2014	PHMSA	Active				

- All participants that meet the search criteria will be displayed in the list below. To view or change participant's information, click the participant's name to display the "Participant's Page".

### Participant Page

The Participant Page is displayed in the "Participant's Details" tab after clicking on a Participant's name. It contains information pertaining to one selected employee (whether active or terminated).

1A3 GOPractice > Minnie J Mouse

WARNING: Altering employment or testing category information may alter the random pools for which this participant is eligible. The participant will be automatically removed from ineligible profiles, and added to eligible profiles, where applicable.

Save Changes

Employment	Vitals	Testing Category
Location: 1A3 GOPractice	First Name: Minnie	Shift: shift 1
Status: Active	Last Name: Mouse	Employment Type: Not specified
Pre-Employment Test: Negative	Middle Name: J	
Hired: 04/21/2014	Gender: Female	
Terminated:	Date Of Birth: 03/02/1945	
Physical Exam:		
Physical Exam Expires:		

#### Identification

Type	Number	Expires	State
Social Security Number	222-22-2222		
Employee ID	Apache		Alaska

#### Occupation

- Operation/Maintenance/Emergency Response (Pipeline and Hazardous Materials Safety Administration)

- The information in the following categories can be accessed or viewed from the Participant Page.
- Much of this information is reviewed and modified during the process of *Updating the ONLINE Participant (Employee) List*.



- Due to lack of needed field labels, PES has re-designated certain fields to contain other information. These fields are described in the Participant Page areas below.

#### Employment Area – on Participant Page

The Employment area for each Participant (employee) can be found on the Participant Page in the left-side box labeled “Employment”. Following is description of all fields along with “PES” re-designated fields indicated by “\*\*” below and their re-designated content.

1. Click into Employment box data field to be changed. Change information as needed. Fields described below:

### 1A3 GOPractice ▶ Minnie J Mouse

**WARNING:** Altering employment or testing category information may alter the random pools

Save Changes

Employment	
Location	1A3 GOPractice
Status	Active
Pre-Employment Test	Negative
Hired	04/21/2014
Terminated	
Physical Exam	04/30/2014
Physical Exam Expires	

- <Location> - This is the Company the participant is employed with. Unless you have access to more than one company, this cannot be changed.
- <Status> - Participant’s status with your Company. PES only utilizes two of the statuses:
  - ACTIVE – means the employee is included in the Random Selection.
    - Leave of Absence – If left as *Active* (at your discretion) & is selected for random testing, you are to request an Alternate giving reason as “Leave of Absence”.
  - TERMINATED – means the employee will NOT be included in the next Random Selection.



- Leave of Absence – If *Terminated* (at your discretion), must re-take applicable (DOT or Non) Pre-employment drug screen to be added back.
  - Inadvertently marked Participant - send email notice (within 30 days) to [policy@panhandleemployers.com](mailto:policy@panhandleemployers.com) for correction.
- <Pre-Employment Test> - Positive, Negative, Unknown, Not Required.
  - <Hired> - Participant’s date of hire. May enter/modify if you wish. NOTE: Veriforce contractors must not modify this date!
  - <Terminated> - Participant’s Terminated date (automatically entered when status changed to Terminated).
  - **\*\*<DOT Drug/Alcohol Background Check Completion Date>\*\*** - This <Physical Exam> field has been re-designated as the employee’s *DOT Drug/Alcohol Background Completion Date (D&A BG)*.
    - Veriforce – If your company reports to Veriforce, completed D&A BG dates must be entered here (those of you doing your own BG may enter the completion date here);
    - PES processes your company’s D&A BGs, completed date is entered here.
  - **\*\*<Criminal Background Check Completion Date>\*\*** - This <Physical Exam Expires> field has been re-designated as the employee’s *Criminal Background Check Completion Date*.
    - TEAM – If your company reports to TEAM & Criminal Background Checks are required, completed Criminal BG date is entered here.
2. Once changes are made to Employment box fields, click the (blue) “Save Changes” button (above Employment area) to save changes made to the Participant’s Employment data.

#### *Vitals Area – on Participant Page*

The Vitals area for each Participant can be found on the Participant Page in the middle box labeled “Vitals”.

1. In the Vitals box, click into the field that you wish to change (fields and content described below);
  - a. <First Name> – 1) May have Operator Code next to first name. This is to assist PES with NCMS update (not required); or 2) if this Participant is duplicated, will have -DUP next to first name;
  - b. <Last Name> – This is the employee’s last name as indicated on Pre-employment drug screen CCF;
  - c. <Middle Name> – This may also be initial;
  - d. <Gender> - Not required & not necessary, but may enter if desire;
  - e. <Date of Birth> - This is the Participant’s birthdate and is taken off the CCF when testing. Please correct if necessary. Required for Veriforce contractors.
2. Make the desired changes to the data (standard edit functions apply to these fields) and click the “Tab” button on your keyboard to set.
3. Click the (blue) “Save Changes” button (above Employment area) to save your changes made to the Participant’s Vitals data.

#### *TESTING CATEGORY Area – on Participant Page*

The Testing Category Area for each Participant (employee) can be found on the Participant Page in the upper right-side box labeled “Testing Category”.

Only the <Shift> field is utilized and only for those companies required to select Non-Regulated random alcohol testing (contractors for Apache, Continental, Exxon, American Midstream, Whiting Oil & Gas etc.). More information on Operator requirements & this field’s contents in the “Review & Make ONLINE Participant (Employee) List Current” Section when updating your Participant (employee) list online.



In the Testing Category box, click into the field that you wish to change (fields and content requirements described below);

1. <Shift> – #1 Requirement for this field: Participant have had a Non-Regulated (Non-DOT) Pre-employment Alcohol within the last 4-6 weeks. If “Yes”, choose either <Shift 1> or <Shift 2> based on the Operator’s requirements and the Participant’s applicability to work for the Operator.
  - a. Shift 1 - Choose this shift for the Participant if: 1) #1 Requirement is met (above in a.) & 2) if Participant applicable to work for any of the following Operators:

American Midstream	Apache
Continental	Whiting Oil & Gas

- b. Shift 2 - Choose this shift for the Participant if: 1) #1 Requirement is met (above in a.) & 2) Participant applicable to work for ExxonMobil.
2. <Employment Type> - This field is not utilized by PES. You may use for company policy if needed.

*Identification Area – on Participant Page*

The Identification Section for each Participant can be found on the Participant Page in the middle right-side box labeled “Identification”.

*ADD Participant’s ID*

1. Click the blue “+” button on the top left of the Identification section to add new.

		Type	Number	Expires	State
		Social Security Number	222-22-2222		
		Employee ID	Apache		Alaska

2. The Add New ID prompt will be displayed. Enter the following information into the provided fields:
  - a. <ID Type> - Choose one of the following using the selection box:
    - i. Alternate ID – not utilized
    - ii. Drivers License – If PES processes your FMCSA – CDL drivers Drug & Alcohol Background Checks, enter the Participant (Employee’s) Drivers License information.

NOTE: Beginning 2020, CDL# will be used to process your Drug & Alcohol Background Checks.



- iii. Employee ID – If Participant is applicable or needs to be applicable to work for any of the following Operators, the Operator’s Name is to be entered in the ID field (if name is not already in ID field); see below

American Midstream	Apache	Continental	Enable Midstream
Enbridge	EnCana	Energy XXI	Enterprise
ExxonMobil	Marathon	NuStar	Whiting Oil & Gas

- b. <ID Number> - Enter the appropriate ID # for the ID type.
  - c. <Expires> - If applicable, enter expiration date in mm / dd / yyyy format.
  - d. <Country> - If applicable, choose the Country using the selection box.
  - e. <State> - If applicable, choose the state using the selection box.
3. Click the “Save” button to add the New ID.

UPDATE (Participant’s) ID

- 1. The Identification Area contains the Participant’s unique identification sources.
- 2. To update an identification source, click the *pencil* icon associated with the source. This will display the Modify ID window.

+ Identification

<div style="background-color: #e0e0e0; padding: 2px; border: 1px solid #ccc; margin-bottom: 5px;"> <span style="color: white; font-weight: bold;">✖</span> <span style="color: white; font-weight: bold;">✎</span> </div> <div style="background-color: #e0e0e0; padding: 2px; border: 1px solid #ccc;"> <span style="color: white; font-weight: bold;">✖</span> <span style="color: white; font-weight: bold;">✎</span> </div>	<p><b>Social Security Number</b></p> <p>Expires:                      State:</p>	<p><b>Number:</b> 222-22-2222</p>
<div style="background-color: #e0e0e0; padding: 2px; border: 1px solid #ccc; margin-bottom: 5px;"> <span style="color: white; font-weight: bold;">✖</span> <span style="color: white; font-weight: bold;">✎</span> </div> <div style="background-color: #e0e0e0; padding: 2px; border: 1px solid #ccc;"> <span style="color: white; font-weight: bold;">✖</span> <span style="color: white; font-weight: bold;">✎</span> </div>	<p><b>Drivers License</b></p> <p>Expires: Jan 17, 2016                      State:</p>	<p><b>Number:</b> 1234561571</p>
<div style="background-color: #e0e0e0; padding: 2px; border: 1px solid #ccc; margin-bottom: 5px;"> <span style="color: white; font-weight: bold;">✖</span> <span style="color: white; font-weight: bold;">✎</span> </div> <div style="background-color: #e0e0e0; padding: 2px; border: 1px solid #ccc;"> <span style="color: white; font-weight: bold;">✖</span> <span style="color: white; font-weight: bold;">✎</span> </div>	<p><b>Employee ID</b></p> <p>Expires:                      State:</p>	<p><b>Number:</b> AF004234234213434</p>

- a. Click into the data field to be changed (standard edit functions apply to these fields);
- b. After changing the data, press the “Tab” key on your keyboard;
- c. Click the “Save” button to save your changes.

#### DELETE (Participant’s) ID

1. Click the red *trash can* icon that corresponds with the Identification record to be deleted.
2. The system prompt, “Are you sure you want to delete this ID?”. Click “OK” to delete or “Cancel” to cancel the deletion and return to the Identification area.
3. If the record is successfully deleted, “ID Removed” confirmation message will be displayed. Click the “Close” button to clear this message.

#### Occupation Area – Participant Page

The Occupation Area for each Participant can be found on the Participant Page in the bottom right-side box labeled “Occupation”. If a participant’s Occupation need to be changed: send Occupation corrections needed to [policy@panhandleemployers.com](mailto:policy@panhandleemployers.com) with all the necessary information. At this time, this section is not functioning properly for PES Client Portal. We hope to resolve this problem soon.

Requirements to change Occupation: Participant must not have any incomplete random testing due for the current quarter.

#### Participant’s “Address” tab

The Participant “Address” tab is used only by PES when annual testing is required of employee. PES (odd-looking) participant addresses will contain all same numbers for Zip code & must not be modified or removed by anyone but PES. Additional participant addresses may be used by company if needed just as long as “PES address” remains untouched.

#### Annual Testing Explanation

A “Random Selection” pool specifically designed to monitor and select the participant for *random* testing when *annual* drug or alcohol testing is due for the following quarter. Testing dates are monitored &



updated by PES to ensure due dates are revised when needed. When *annual* testing is due for a participant, the *Random* Testing is generated and the designated contact for the participant's company receives notification that "Random Testing" is due for the specified participant. When *annual* test results arrive with "Test Reason" checked as *random*, the "Test Reason" on the Result & the Result Letter is corrected to "Test Reason" - *annual*.

If you receive notification of duplicate testing, remember that DOT always takes precedence over Non-Regulated (including annual testing). However, if there is duplication causing a complication of the Testing Panel, do not hesitate to contact PES. We are here to help.

#### Participant's "Phone" tab

The Participant's "Phone" tab is used only by PES MRO Department when reviewing completed testing forms (CCFs). However, just because the phone number is present in the Participant's tab does NOT mean that the employee's test results were reviewed by the MRO. Often times, phone numbers are entered just because the phone number is legible and on the CCF.

You may enter new phone numbers in Participant tab if you wish to utilize this tab. Please do NOT remove PES MRO entered phone numbers.

## "Review & Make Online Participant List Current"

The following update steps repeats the above information without providing the explanations. If you've skipped down to this Section & run into a snag, look in other Sections of this Guide for more information.

**Email Notice:** Toward the end of every quarter, PES will send email notices with this as the subject: "Review & Make ONLINE Employee (Participant) List Current by End of Every Quarter". Notices are sent to all company designated contacts letting them know that by the end of the quarter, your Screenhub (online) Participant List will need to be reviewed and made current so that the next Random Selection will select from employees that are still employed by your company.

**When to Update Participant List in Screenhub:** The participants' status in Screenhub can be reviewed and updated at any time throughout each quarter. However, to prepare for the next Random Selection, your Screenhub participant status' must be current at & by the end of each quarter (Dec. 30, Mar. 31, June 30 and Sept 30).

**Participant List Report:** The downloadable Participant List report in "Reports" tab will contain ONLY "Active" participants & is only for your reference to use for comparison with your current company records. While reviewing your company's current employee records, it's a good idea to note on this Participant List report which employees are no longer employed to later use when editing Participant Pages in Screenhub.

**What to Know or Note Before Proceeding to "Participant List Update in Screenhub":** All Company employment statuses (terminations, applicants hired, "Leave of Absences", etc.) should be considered. PES does not utilize any of the other statuses shown in Screenhub except "Active" and "Terminated". You may not change employee's status to anything other than "Terminated". If your employee is currently on "Leave of Absence" & probably will not return during the next quarter, please see Section: "Employment Area – Participant Page" before making your decision on what "Status" to choose.



**Keep in mind that DOT auditors (both FMCSA & PHMSA) most often request these lists from PES. The requested list is usually a list of all DOT employees that were included in the Random Selection pool(s) for each quarter and for a specified length of time (1-2 years).**

Before proceeding, you must know which of your Participant Pages (employees) need to be terminated or edited.

**Participant List Update in Screenhub:**

1. Login to ScreenHubb & click “Companies” tab;
2. Click your Company Name (below) to go into “Company Detail” window;
3. Click blue “Participants” tab;
4. Hover cursor in <Participant Search> field (blue) to show list of filters;
5. From list of filters, choose “your preferred” filter (e.g. Last Name);
6. In *Filter* parenthesis, type the Participant’s information to search by (e.g. LastName:”type here”);
7. All Participants matching your filter search will appear in the list below;
8. Click Employee’s Name from provided list of Participants, this will open the “Participant’s Page”;

**To Terminate Employee:** Do not change employee’s status to anything other than “Terminated”.

9. Choose “Terminate” from <Status> field drop-down menu;
10. Click blue “Save Changes” button to save changes (above “Employment” area).

**To Add Employee:** When employee takes Pre-employment drug test & results arrive from MRO review, a new Participant Page is automatically created. Participants may not be added without Pre-employment testing.

11. If you have not received “new” Authorization Form (since March 2018), send email request to [policy@panhandleemployers.com](mailto:policy@panhandleemployers.com) for “new Authorization Form”;
12. Complete Authorization Form / OR “Form Fox Authorization Form” & send with employee to collection site for (REQUIRED) Pre-employment drug screen.
13. If you have the employee’s results from drug screen that was collected in last 30 days & need Participant added, send email to PES MRO – results1@panhandleemployers.com.

**Completion**

\*Once all Participant’s Pages in Screenhubb (including Operator applicability – see below) are correct and current according to your company records, the Update is complete & you do NOT need to send List to PES.\*

**\*\*PROCEED ONLY IF YOUR COMPANY WORKS FOR an Operator (Non-DOT) that requires you be audited by TEAM or NCMS.\*\* (see table below)**








**Operator Applicability:**

To keep your employees compliant with Operators, PES must know which Operators your employees work for or “applicable to work for”. “Operator applicable means that the employee is compliant with “requirements” in case called for work.

*American Midstream	*Apache	*Continental	Enable Midstream
	EnCana	Enbridge	Enterprise
**ExxonMobil	Marathon	NuStar	*Whiting Oil & Gas



1. Starting in Participant’s Page;
2. Go to Identification box (middle right-side);
3. <Employee ID> or <Alternate ID> fields - must contain names of Operators that Participant applicable to work for. (In the following example, this participant’s applicable Operators are Apache, Continental and Enterprise.);

+ Identification		Type	Number	Expires	State
		Social Security Number	222-22-2222		
		 Employee ID	Apache,Continental		
		Alternate ID	Enterprise		

1. To add, click “+” button (left corner of “Identification” area);
2. From drop-down menu, choose <Employee ID>;
3. In the <ID> field, type the name of each applicable Operator for this participant;
4. Click “Save” button.
5. To edit, click the *pencil* icon next to <Employee ID> or <Alternate ID>;
6. To delete, click the *trash can* icon next to <Employee ID> or <Alternate ID>.

*Random Alcohol:* If the Operator has \* or \*\* in front of their name in the table above, the participant is required to be included in Random Alcohol Selection pool.

1. Proceed ONLY if the employee has taken “immediately preceding” Non-DOT Pre-employment Alcohol test!
2. Still in Participant’s Page – in Testing Category box (top right);
3. In <Shift> field, from drop-down menu, choose as follows:
  - a. If Operator has \* (1 star) - Choose <Shift 1>;
  - b. If ExxonMobil \*\* (2 stars) – Choose <Shift 2> (these Participant Pages are likely in a different location). See “Locations” section following

NOW the Participant List Update is complete – if your Company works for Operators.



## Company's – Locations (your company may or may not have any locations)

Locations are used (rarely) to create a “child” company that is directly associated with your “parent” company. All of you have a “parent” company & are in it right now. However, not all will have a “child” company.

1. Click the “Locations” tab to display locations associated with the “parent” company.
2. If there is a location listed below, click on the location name to enter the location or “child” company.
3. To return to the “parent” company, click on the “parent” company name

We have created “child” companies for the following reasons:

- If you have DOT (FMCSA or PHMSA) employees who are currently applicable to work for Exxonmobil.
  - Why? Because your DOT Participants were duplicated as Non-Regulated in the “child” location for participation in the required (Non-Regulated) Random Selection pool with rates of 50 percent for both drug and 50 percent for alcohol per year.
- If you have any DOT (FMCSA) employees who are currently applicable to work for EnCana.
  - Why? Because EnCana does NOT accept the DOT (FMCSA) Random Selection drug percentage rate of 25 percent. EnCana requires the Random Selection drug rate to be 50 percent.
- If you are a Contact for more than one Company & need to view multiple companies or receive email notifications from multiple companies.
  - Why? Because Screenhub currently does not allow Client Portal access to Contacts with the same email address.

If you’ve gone into a location or “child” company, return to the “parent” company for next section.

Random Testing DUE DATE: All Random Selection testing should be completed by at least 2 weeks before the end of the quarter in which they were selected. This allows for any testing issues to be resolved before the end of the quarter & SAVES you from possibly having an “incomplete” randomly selected test.

**WARNING:** From this point on, any participant (employee) that does NOT complete randomly selected testing & and Alternate was NOT requested WILL automatically be TERMINATED. The terminated employee MUST take a Pre-employment drug screen to re-enter Random Selection pool(s). If the terminated employee was previously in an “Alcohol” Random Selection pool, the employee WILL have to take a Pre-employment alcohol test to re-enter the “alcohol” Random Selection pool.

Random Selection List(s): If Participants from your Company have been selected for random testing for the current quarter, you will receive an email that says you have a Random Selections List Report available.

Reports – Downloadable List: The downloadable Random Selections List(s) in the “Reports” tab (top of any Screenhub page) is where you may print your list if you wish. BE SURE to check for multiple “different” Random Selections Lists because each Random Selection pool that your Company participates in will generate a separate Random Selections List report.

To View Random Selection List(s):

1. Login to Screenhub;
2. Click the “Companies” tab to display your Company’s Overview;
3. Click the (blue) “Results” tab to display 3 additional tabs – “Pending Randoms”, “Complete Randoms” & “Other Results”;
4. Click the “Pending Randoms” tab to display a list of Random Selection Pool(s) with 5 different columns (see below);

Profile	Pull Date	Alcohol Selected	Drug Selected	Progress
Practice (Practice Gp) + Show Selected	Jun 21, 2018	1/1	1/1	<div style="width: 100%;"><div style="width: 100%;"></div></div>



- a. Profile – the different Random Selection pool(s) with Random Selections;
- b. Pull Date – date that the Random Selections occurred (hence, the quarter in which the Random Testing needs to be completed);
- c. Alcohol Selected – If your company is in a Random Alcohol Selection pool, there could be numbers here.
  - i. 1<sup>st</sup> number – number of random alcohol tests selected from your company’s participants (example below shows this company has 1 random alcohols due by end of 2<sup>nd</sup> quarter-2018);
  - ii. 2<sup>nd</sup> number – total number of random alcohol tests selected from this Random Selection pool (example below shows this Selection pool has total of 15 random alcohols that are due by end of 2<sup>nd</sup> quarter-2018).
- d. Drug Selected – If your company is in a Random Drug Selection pool, there could be numbers here.



- i. 1<sup>st</sup> number – this is the number of random drug tests selected from your company’s participants (example below shows this company has 2 random drug tests due by end of 2<sup>nd</sup> quarter-2018);
- ii. 2<sup>nd</sup> number – this is the total number of random drug tests selected from this Random Selection pool (example below shows this Random pool has total of 65 random drug tests due by end of 2<sup>nd</sup> quarter-2018)

Pull Date	Alcohol Selected	Drug Selected
Apr 18, 2018	1/ 15	2/ 65

- e. Progress - This is the progress of your Company’s completed random testing for this Random pool & this Quarter.
  - i. *Martini glass* icon – progress of random alcohol testing (example below shows this company has completed 1 out of 2 random alcohol tests due by end of 2<sup>nd</sup> Quarter-2018);
  - ii. *Paperclip* icon – progress of random drug testing.

Pull Date	Alcohol Selected	Drug Selected	Progress
Apr 18, 2018	2/ 65	0/ 0	 <div style="width: 50%; background-color: green; height: 10px; display: inline-block;"></div> 50%  <div style="width: 100%; background-color: #ccc; height: 10px; display: inline-block;"></div>

5. Click “+ Show Selected” under a Random Selection pool with *current Quarter’s Pull Date* to display Random Selected Participants (example below shows that Dewey Duck was selected for both Random drug-“controlled substances” & alcohol).

Pending Randoms   Completed Randoms   Other Results

Profile	Pull Date	Alcohol Selected	Drug Selected	Progress
Practice (Practice Gp) <a href="#">Hide Selected</a>	Jun 21, 2018	1/ 1	1/ 1	 <div style="width: 100%; background-color: #ccc; height: 10px; display: inline-block;"></div>  <div style="width: 100%; background-color: #ccc; height: 10px; display: inline-block;"></div>

Participant	Test Type
Dewey Duck (7777)	Controlled Substance and Alcohol

[Select alternate](#)

6. Repeat step 5 if there are additional Random Selection pool(s) listed for the current Quarter under the Pull Date.

To Request Alternate for Random Selection Testing: Before proceeding, you should be able to provide a *legitimate* “REASON WHY” the original Participant Selected cannot complete the Random Testing by DUE DATE (2 weeks before end of quarter).

- 7. Repeat steps 1-5 above until you’ve located the Random Selected Participant who cannot complete testing and needs an Alternate Selection;
- 8. Click (blue) “Select Alternate” button (see in example above);
- 9. Click “Yes” or “No” buttons to prompt asking, “Are you sure you wish to continue?”, If chose yes;



10. Choose the *legitimate* “Reason why” the original Participant Selected cannot complete Random Testing from the drop-down menu. These are the Reasons to choose from:
  - a. No longer employed with company;
  - b. On long-term disability;
  - c. On vacation/leave of absence.
11. Click (blue) “submit” button to send your request to PES;
12. If the same Participant was selected for Random Testing from more than one Random Selection pool, BE SURE to repeat steps 7-11 to request Alternate.
13. When your Alternate is selected, the name of the Alternate will appear in the Random Selection List in place of the original Random Selection.

NOTE: We’ve requested for you to have an indicator beside the name of the Alternate. Until then, if you have more than 1 page of Random Selections from this Random Selection pool to scroll through in “Pending Randoms” tab, someone will email you with the name of the Alternate.