SHIELD Illinois Collection Site Policies

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Safety

All	Testing organizations will specify a main point of contact for SHIELD Illinois in the onboarding organization questionnaire. This contact will be stored in SHIELD Illinois records and used by the SHIELD team, including the Relationship Manager, to communicate important information on the SHIELD Illinois testing program. The only person who can change a main point of contact are the current main POC or agency executive. If the main point of contact is not able to transfer the main point of contact, the change of contact must be done in writing on agency letterhead and be reviewed and approved by the Sr. Director of Testing Operations or their designee. (K-12: The only substitute for the current main point of contact is the superintendent of a school district (public school), headmaster, CEO, or principal (private school). Change must still be made in writing. SHIELD Illinois may require a district to name a new main point of contact if the current main point of contact if the Sr. Director of Testing Operations and Sr. Director of SHIELD Operations agree the main POC has been rude or abusive to the SHIELD Illinois team. This applies even if the main POC is the superintendent of a school district (public school), headmaster, CEO, or principal (private school).
All	SHIELD Illinois may block or ban an individual from contacting one or all members of the SHIELD Illinois team if the Sr. Director of Testing Operations and Sr. Director of SHIELD Operations agree they have been rude or abusive to the SHIELD Illinois team.
All	Misuse of emergency contact options (including but not limited to URGENT or EMERGENCY designated support requests and the personal cell phone numbers (for text or call) of any SHIELD Illinois team member may result in the banning/blocking of that person from contacting SHIELD Illinois and/or removal of Mass Tester Privileges.
All	Questions, issues, or other feedback from Testing organizations should be directed through the proper SHIELD Illinois channels, either the testing organization's Relationship Manager or the SHIELD Illinois support team ticketing system.

Testing organizations or operations partners are not to contact SHIELD Illinois labs directly.

SHIELD Illinois Testing Program Onboarding

SHIELD Saliva Testing Onboarding Guides

All	SHIELD Illinois onboarding guides are provided to the Testing Organization by SHIELD Illinois Relationship Managers. TOs must complete all modules found on the onboarding guide prior to the launch of their testing program. Launching a new SHIELD Illinois testing program typically takes 2 to 4 weeks.
All	Agency configuration in PnC Mass Tester may take up to 7 business days.
All	User access rosters take 3-5 business days to process.
K-12	Patient rosters take 5-7 business days to process.

Antigen Testing through SHIELD Illinois

K-12	Testing organizations eligible to use SHIELD Illinois to report Antigen tests administered must complete an interest submission and onboarding guide provided by the SHIELD Illinois Relationship Manager.
K-12	Antigen tests are procured and shipped through IDPH. SHIELD Illinois does not provide antigen tests, nor manages antigen test orders.

Unobserved Collection of covidSHIELD test

K-12	Testing organizations eligible for unobserved collection of the covidSHIELD test must complete a registration form.
K-12	Patient eligibility: Patients ages 6 and older are approved for unobserved collections of the covidSHIELD test per EUA. IDPH guidelines on patient eligibility may differ.

SHIELD Illinois Point-n-Click EMR

PnC Users

All	Each user must have their own, unique, PnC Mass Tester user account. This account will be used to access patients' records and associate specimens with their electronic records. User accounts cannot be shared among employees. Each employee must use their own account when accessing PnC Mass Tester.

Users must provide a work email, a mobile phone number, and the name of their employer.

All   Two factor authentication (2FA) when accessing PnC Mass Tester is used by SHIELD Illinois. Users must provide a mobile phone number to which they will be sent a text message containing a code. This code will be used when logging into PnC Mass Tester.

Training

All   All users must complete the online SHIELD Illinois PnC Collection site training course prior to accessing PnC Mass Tester. This must be done on an annual basis. Users must also sign a collection site worker checklist and certify they have completed HIPAA training found in the online course.

SHIELD Illinois conducts audits on users to ensure they are following all SOP's and policies found in this document, the SHIELD SOP document, and on the training course. Users found not in compliance with SOP's and policies may be deactivated.

All   SHIELD Illinois will only add initial supervisor users (this is users of PnC, *not* patients). All other users must be added by the agency. Initial supervisor user must be requested by main POC via a ticket submitted to https://go.uillinois.edu/helpmeshield.

All   Any additional permissions or users that cannot be added by the agency supervisor must be requested by the main point of contact. Main point of contact must review users and user permissions for their agency on a quarterly basis and provide affirmative confirmation that it is correct. SHIELD Illinois will send notification of when these audits need to be conducted and completed.

All   This includes operations partners who must review their users for every agency and assure that only users that need access to an agency have an active login for that agency.

PnC Mass Tester

Testing Location

Users must select the location that corresponds with their physical location when accessioning saliva samples. Additional testing locations may be requested by the testing organization by submitting a support ticket to SHIELD Illinois.

All
If antigen tests are being administered, a separate "Antigen" location must be chosen.

If unobserved test kits are being accessioned into Mass tester, a separate "Unobserved" location must be chosen.

Patient QR Codes

K-12
Patient QR codes must be used at K-12 testing sites for students, staff, and faculty. Collection site personnel may not use name, DOB, or other data points to search for patients in PnC Mass tester.

PnC Scheduling Tool

All
Initial schedules are set using information from the onboarding organization questionnaire. Schedule changes may be requested from the SHIELD Illinois Support Team by submitting a ticket.

All
All appointments are 10 minutes in duration. Use additional appointments per 10-minute period to increase frequency.

Schedule Changes

All
Each agency is allowed one schedule change per calendar quarter. SHIELD Illinois will block days requested for holidays or other closures but will not make additions or other schedule changes for individual days.

Please use Walk-In appointments to increase testing availability on individual days.

It may take 7-10 business days for requested changes to become effective.

The schedule should reflect the entire testing week on an ongoing basis--not just the requested changes.

PnC Patient Records and Patient Portal

All	SHIELD Partner Help will not deactivate patient accounts. If a patient opts out of testing, the agency should use the Consent Management tool to remove consent from that patient. If an account needs to be deactivated, the patient or their legal guardian will need to call the Patient Support to request this. SHIELD Illinois discourages the deactivation of accounts as it will prevent the individual from ever testing with SHIELD Illinois at any site/location until patient support is called by the patient or guardian to reactivate the account.

Adding New Patient records

K-12	More than 30 new records may be sent to SHIELD Illinois as a patient roster. Only new patients should be included in the patient roster file. Fewer than 30 new records must be added by a district user manually. Rosters containing less than 30 records will not be uploaded.

Adding Dependent Accounts

K-12	Parents or guardians of minors registered in SHIELD testing may add dependents registered for SHIELD testing to their accounts. Dependents are matched on first name, last name, date of birth, a unique email address, and a student or employee number may be used.

Collection Site Supplies and Equipment
Ordering Supplies provided by SHIELD Illinois

All	Testing organizations self-collecting saliva specimens must sign up for an InFlow account to order supplies provided by SHIELD Illinois. All supplies

provided by SHIELD Illinois must be ordered through SHIELD Illinois' InFlow.

All InFlow orders may take 2 to 3 weeks to fulfill.

K-12 Testing organizations administering saliva tests under the Test to Stay protocol must sign up for an InFlow account to order supplies.

K-12 Testing organizations conducting unobserved collections of the covidSHIELD test must sign up for an InFlow account to order unobserved collection kits.

To request Test to Stay or Unobserved supplies via InFlow

If you **do not** have an InFlow account

1. Sign up for an account on InFlow for supply ordering. Directions on how to do so are [here](#).
2. When signing up, please include the following in your message:
    1. Who you are.
    2. What kit(s) you will be requesting (e.g. Test to Stay, Unobserved).
    3. When you need the supplies (please give at least one week).
    4. Who your SHIELD Relationship Manager is

K-12 If you **do** have an InFlow account

1. [Log in to InFlow](#).
2. Click on the envelope icon in the upper right of the screen (see below).
3. Submit a message with the following information:
    1. Who you are.
    2. What kit(s) you will be requesting (e.g. Test to Stay, Unobserved).
    3. When you need the supplies (please give at least one week).
    4. Who your SHIELD Relationship Manager is

Collection Site Supplies and Equipment

All Hardware requirements

Hardware requirements for a Collection Site are as follows. Testing organizations or operations partners are responsible for providing the following hardware:

Mass Tester Computer

The computer partners use for a mass testing pop up clinic can be a PC, Mac, or iPad Pro (USB-C version only). There is no software to install if the machine is capable of running the Chrome browser. If the device has USB-C ports only, a USB-C to USB-2 converter is required.

Mass Tester Scanner

The scanner needs to be 2D capable and should be a CMOS camera scanner, not a laser scanner; only the CMOS camera scanners will accurately read bar codes on phone displays.

Most sites use QR codes on phones for the appointment and linear bar codes on the specimen. The device needs to be able to read both types of codes. See Collection Site Supplies list for more information and recommended scanner.

Important notes on wireless scanners:

- The scanner must be stored with its corresponding cradle, it will not work with another scanners cradle.
- The cradle must be connected via USB to the laptop to scan into PnC Mass Tester.
- List of additional supplies required for a collection site is found on SHIELD Illinois onboarding guides and must be purchased by the Testing organization or operations partner at their expense.

All

Tubs and Racks Exchange

SHIELD Illinois Depot, Labs, and funnel sites use a 1-to-1 exchange policy for tubs and racks delivered by testing organizations and their couriers. Full tubs/racks will be exchanged for empty tubs/racks.

All

Testing organizations may not receive their original tubs or racks but will receive a comparable tub and racks. Testing organizations do not need to label their tubs and racks with their organization's name.

Site and Patient Supervision

Testing organizations must provide the operation partner team on-site with a point of contact for any issues, questions, etc. that arise during the collection period.

Partners using Ops. Partners

Testing organizations must have a staff member available at the testing site to assist patients at the test site. This may include, but is not limited to, adhering with SHIELD Illinois SOPs and policies, safety policies, addressing patient behavior or conduct, or addressing patient questions.

Operations partners are not responsible for managing patient behavior, but may request patients adhere to SHIELD Illinois SOP and policies

Collection Minimums

Ops. Partners

Testing organizations must collect at least 100 samples per Operations Partner deployment of approximately 3 hours.

Operations Partners to notify SHIELD Illinois if Testing Organizations are not meeting collection minimums.

User limits and naming conventions

Operations Partners may have:

Ops. Partners

- Up to 4 Operations Partner Supervisors with the ability to create agency supervisors at other agencies.
- Each operations partner may have 2 agency supervisors.
- Each operations partner may have the number of mass tester users necessary to effectively and efficiently administer SARS-COV-2 screening on behalf of SHIELD Illinois.
  - It is the responsibility of the Operations Partner executive leadership to assure that only the users necessary to effectively and efficiently administer SARS-COV-2 screening on behalf of SHIELD Illinois.
- No Operations Partner users will have "with registration" permissions for K-12 districts.
- Agency supervisors and mass tester users may not have access to more than one agency per login.

SHIELD ILLINOIS

Operations Partner username shall follow the following conventions:

- For ops partner agency and ops partner community testing agency
  - [Operations partner name]_[last name][first initial][optional middle name or designator]
    - E.g. pivot_smithj1
- For Operations Supervisor Accounts
  - os_[Operations partner name]_[last name][first initial][optional middle name or designator]
    - E.g. os_pivot_smithj1
- For Agency logins (Agency supervisors and mass tester users)
  - [Agency][Operations partner name]_[last name][first initial][optional middle name or designator]
    - E.g. d93_pivot_smithj1

Supplies Management

Each Operations Partner must establish a centralized location for all supplies to be shipped to, managed, and organized. Supplies will then be shipped out by your team to the accounts from this centralized location.

There should be a main point of contact for supplies.

Ops. Partners

Ordering and Shipping

Supplies are shipped out weekly by the SHIELD supply team, which is authorized by data from the collection sites. Operations Partners are responsible for ordering rack bags which can be found in our InFlow system [here](#).

The [other supplies](#) Operations partners are responsible for are laptops, scanners, bins, industrial sharpies, and PPE.

All labs exchanged racks and bins 1:1, courier should leave with the same amount they arrived with to take back to operations partner teams.

Ops. Partners — ALL specimens collected before noon must be delivered to the lab by 2pm at the latest.

SHIELD Illinois Community Testing Site Policies

All — Members of the general public may test at SHIELD Illinois Community testing sites regardless of vaccination status or symptoms.

All — SHIELD Illinois Community testing sites are open to walk-ins. Appointments may be encouraged but are not necessary.

All — All new SHIELD Illinois Community testing sites are subject to approval by SHIELD Illinois prior to launch.

Safety

All — All patients, regardless of vaccine status, must wear a mask or face covering over their mouth and nose while at the testing site. Patients may only lower their mask or face covering while providing a saliva specimen.

All — All on-site collection site personnel must wear a mask or face covering their nose and mouth at all times while at the testing site.

All — All on-site collection site personnel must wear gloves while at the testing site.

Inclement Weather

All — SHIELD Illinois operations may be suspended due to inclement weather.

SHIELD Illinois will announce any testing suspension or closure of collection sites and/or labs.