



Confirmation of Services and Supplies User Guide



Feature Overview

Confirmation of Services and Supplies (COSS) is a new feature being released by FormFox. This feature enables clinics to receive a list of all pending services ordered at their site and respond to the customer confirming they can deliver the requested services by having the appropriate staff and supplies available to complete them as ordered.

Who Should Use It

The confirmation process will be enabled for all clinics. By confirming services through FormFox, the ordering party can be assured that the donor will not be turned away. By providing this certainty to employers and TPAs, the process should reduce phone calls to clinics to manually confirm services, reduce workload and provide a better experience for all parties involved.

Prerequisites

Enabling the Feature

The feature will be enabled for all clinics at the time of feature roll-out. Each clinic must designate at least one user who is authorized to confirm services and supplies. This can be completed by having a user with site administrator access add a user to the clinic contact table and select the checkbox indicating they are authorized to confirm services and supplies. A clinic may designate more than one authorized user.

Authorizing Users

At go-live, FormFox will automatically authorize any user listed as a Responsible Party to confirm services and supplies. If a Responsible Party is not listed, FormFox will authorize the last active user. After go-live, site administrators should validate that the clinic contact table reflects the correct individual(s) authorized to confirm services and supplies. (See instructions below.)

Setting Hours of Operation by Service Category

Clinics now have the option to adjust their hours of operation based on the category of services they offer. This option is ideal for clinics that may be able to perform some services until closing but stop providing other services earlier in the day. These hours will appear on the daily request and, in an upcoming release, will also be visible to customers when placing an order.



How to Access It

The confirmation request is mobile-friendly and can be accessed on a smartphone, tablet, or desktop. A daily request for confirmation of services will be sent at 1:30 pm CST to authorized users at the site. Authorized users can choose to receive the daily request via email, text message, or both. At feature roll-out, users will receive their daily confirmation request by email. Users may also choose to opt in to receiving requests by text message.



Step-by-Step Instructions

Setting up Authorized Users

Any user with site administrator privileges can authorize users to confirm services by following these steps:

1. From the FormFox home page, click on System in the lower left corner.
2. Enter your password.
3. Choose the site for which you want to set up an authorized user.
4. Scroll to the clinic contacts section.
5. If the user is already listed in the table, click on the user's name. If you are adding a user, click Add Contact.

CLINIC CONTACTS

Click on a name to edit an existing contact or use the button to add a new contact.

Type	Conf Svc	Name	Office Phone	Phone Ext	Mobile Number	Text Msg	Email	Notes
Remittance / Billing	No	test test				No		

Add Contact

6. Check the "Authorized to confirm services and supplies" box

CLINIC CONTACT

Add new contact information.

Type: Responsible Party Authorized to confirm services and supplies

User:

Required

First Name* Last Name*

Office Phone: () - - ext

Mobile Number: () - -

User agrees to receive text messages

Email*

Notes

Close Submit



7. Select the correct user profile from the drop down list for the user that should be authorized to confirm services, the user's name and email will fill in. Phone numbers can be added as well.
8. Click Submit.
9. The user should now be listed in the table.
10. When you are finished adding authorized users, scroll down and click Submit to close the window.

Establishing Different Hours for Service Categories & Shipment Pickup Time

Hours of Operation

Drug Screening & Collections

Clinical Services & Vaccinations

Occupational Health & Exams

Services needing a Qualified Collector

<input checked="" type="checkbox"/> M	from	08:00	to	17:00	split service >
<input checked="" type="checkbox"/> T	from	08:00	to	17:00	split service >
<input checked="" type="checkbox"/> W	from	08:00	to	17:00	split service >
<input checked="" type="checkbox"/> TH	from	08:00	to	17:00	split service >
<input checked="" type="checkbox"/> F	from	08:00	to	17:00	split service >
<input checked="" type="checkbox"/> S	from	08:00	to	15:00	split service >
<input type="checkbox"/> Su	from		to		split service >

This clinic is open 24 hours/day

Shipment Pick-Up Time --

1. Click on System.
2. Enter your password.
3. Choose the site for which you want to set up additional hours of operation.
4. Look at the Hours of Operation section.
5. By default, your hours of operation will be displayed under Drug Screening & Collections. If you offer different hours of operation for a service category, click the title of that category and enter the hours.
6. Clinics should also list their shipment pickup time. This will be important for a future feature that is coming later in 2026.



As a reminder, this is an optional feature. If a clinic can provide all services during all hours of operation, there is no need to set additional hours.

Responding to a Confirmation Request

Clinical Collections 2 Pending

May 15, 2026

REQUIRED CREDENTIAL
Phlebotomist or Licensed Nurse
Hours not provided

REQUIRED SUPPLIES

KIT - CLINICAL COLLECTION (2)

View 2 Services

Confirm 2 Services
Staff & supplies ready

Overnight Supplies (2) **Donor Needs to Call (2)**
to Schedule

Unable to Perform (2)
Cannot complete these services

A daily request for confirmation of services will be sent at 1:30 pm CST to the authorized user(s) at the site. To respond to the request:

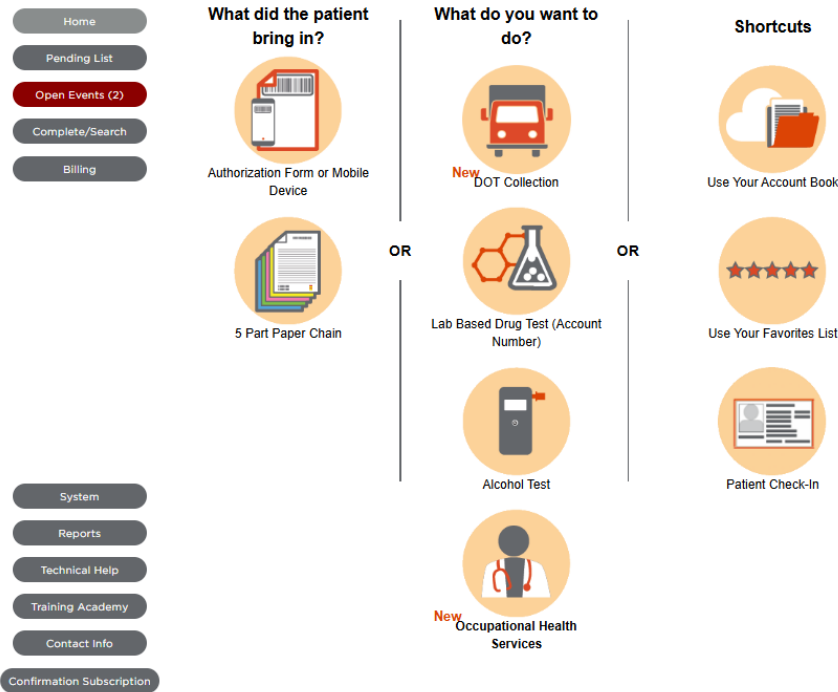
1. Click on the link in the email or text message you received. The link is good for 24 hours.
2. You will be taken to the daily request. The request is divided into 4 service categories:
 - a. Clinical Services
 - b. Occupational Health Services and Exams
 - c. Drug Screening and Collections
 - d. Vaccinations
3. For each service category, you will see the required credentials, the hours your clinic has stated services can be performed, a list of supplies (if applicable), and buttons to respond with a confirmation response.
4. To confirm services, you can choose to complete confirmations in bulk or individually.



- a. To complete a bulk update, leave the boxes checked next to the services you wish to confirm. Choose the response from one of the buttons.
 - b. To complete an individual confirmation, click the downward arrow to the right of “View Services.”
5. The following responses are available to confirm services:
- a. Confirm Services – the clinic is able to perform services as ordered with the necessary staff and supplies on hand.
 - b. Overnight supplies – the clinic can perform the services if supplies are overnighted. This response will be available until 2:30 pm cst which is the cutoff for CRL to overnight supplies. An alternate workflow will be presented when you click Submit to confirm the shipping address.
 - c. Donor Needs to Call – The clinic can perform services but needs the donor to call ahead. A good example of this is for flu vaccinations. If your stock of vaccines is running low, you might suggest the donor call first before coming in. An alternate workflow will be presented when you click Submit to provide notes as to why the donor should call.
 - d. Unable to Perform – The clinic cannot render services as ordered. This could be caused by any number of reasons: lack of supplies, unexpected staffing shortages, weather challenges, etc. An alternate workflow will be presented when you click Submit, allowing you to indicate if this is a permanent or temporary issue and provide notes further explaining why services cannot be performed.



How to Enroll in Text Messages



1. From the home screen, click on the Confirmation Subscription button in the bottom left-hand corner. This feature is only available for authorized users.

The screenshot shows a pop-up window titled 'CONFIRMATION SUBSCRIPTION'. The text inside reads: 'Please choose the method(s) you would like to receive confirmation of service and supplies requests'. There are three checked options: 'Email' with a text input field containing 'shawn.oneil@crlcorp.com', 'Text' with a text input field containing '(555) 555-5555', and 'I agree to receive notifications by text messaging.'. At the bottom right, there are 'Save' and 'Close' buttons.

2. At the pop-up choose if you wish to receive confirmation requests by email, text, messaging or both. Authorized users must select at least 1 method. By default, it will be email.



FAQ

Do I have to wait for a daily request or can I perform confirmations throughout the day?

At the time of feature roll-out, the only way to confirm services and supplies is by responding to the daily request. However, FormFox is working on future enhancements where authorized users will be able to confirm services directly from FormFox throughout the day.

When a clinic responds to the daily request about supplies and staffing and hits send, does the response take effect immediately?

The confirmation of services and supplies email will go out mid-afternoon about services ordered for the next couple of days. If you are canceling services, that information will go back to the client, where they can take action and reschedule. You have the option to turn off certain services in the admin portal if you have a staff member out and do not want to allow someone to order that service for a certain period of time. Available services are provided to the ordering party at the time the order is placed, so the existing solution had a delay built in that we are trying to improve with the daily confirmation of services and supplies process.

If a clinic answers “No” to staffing for a service (e.g., drug screens, blood draws) because the office is closed that day or staff is offsite (post-accident BAT, school sports drug screens, etc.), will that mark the site as unavailable for that day only?

Your response to the confirmation of services and supplies is for the services that are ordered on the date specified in that payload. You will be responding for services that are potentially ordered tomorrow or the following day, and your response is limited to those services.

When a site is marked unavailable for a service for the day, does that mean no orders for that service will be routed to the clinic that day?

You have the option to mark your clinic as unavailable in the admin portal for services ordered on the day that you set it. This is different from the confirmation of services and supplies email, which is limited to only the services that have already been ordered, unless you ask for a broader cancellation time frame.



If the clinic answers “Yes” to all services the following morning, will orders resume routing to the site normally that next day?

The confirmation of services and supplies does not cancel or block services ordered after you respond to that email, unless you request a permanent change. This is about confirming specific ordered services for the time frame indicated. The daily email that arrives mid-afternoon will list the ordered services that have been requested for the following day or over the next couple of days.