How to Place an Order

In this document, you will find information or step-by-step directions on the following topics:

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TIP: To begin ordering on behalf of your organization, you must have permissions granted by your Site Administrator.
Add Items to Your Cart

Add Programs, Publications, and Learning Items to Your Cart

1. Select a program tab.

**Important:** Review the drop down menu labeled *I'm making purchases for* to ensure you are making the purchase on behalf of the correct organization or party.

In this example, you will view an order placed on behalf of an organization.

**TIP:** To make sure you are in the correct cart, you can view the *I'm making purchases for* drop down menu and make changes as necessary. You can also view the cart type in the welcome box on the screen.
2. Add **Quantity**.

3. Click **Add to Cart**.

4. You will receive confirmation that the item was successfully added to your cart. Click **Continue**.

You may continue to add more items or click **Shopping Cart** to review the items you have chosen.
Add Donations to Your Cart on Your Personal Account

1. Navigate to cap.org.
2. Click Shop.
3. Click Membership Dues & Contributions tab.

**TIP:** To make sure you are in the correct cart, view the I'm making purchases for drop down menu and make changes as necessary.

4. Indicate the type of contribution you would like to make by checking the box.
5. Add the **Amount in $ Increments** of contribution you would like to make.
6. Click Add to Cart.

The donation will appear in your shopping cart.
Place an Order

Place a Personal Order
1. When you’ve added all of your desired items, click Shopping Cart.

Important: Review the drop down menu labeled I'm making purchases for to ensure you are making the purchase on the personal account.
2. Review the items in your shopping cart.
3. Click **Checkout** to begin your transaction.

**TIP:** If you are not ready to complete your order, click the **Actions** drop down menu for additional options (explained in table below).

<table>
<thead>
<tr>
<th>Label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save Cart</td>
<td>If you are not ready to make a purchase but would like your items to be available at a later date, select <strong>Save Cart</strong> and click <strong>GO</strong>.</td>
</tr>
<tr>
<td>Delete Cart</td>
<td>If you have decided not to make a purchase and want to empty your cart, select <strong>Delete Cart</strong> and click <strong>GO</strong>.</td>
</tr>
<tr>
<td>Add to Wish List</td>
<td>If you want to save your items in a wish list for future use, click <strong>Add to Wish List</strong> and click <strong>GO</strong>.</td>
</tr>
</tbody>
</table>
4. Review and make **Shipping Address, Shipping Information, and Billing Address changes as needed**.

5. Use the **Credit Card** drop down menu to select the credit card you would like to use for payment or enter new information.

6. Click **Continue**.

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**TIP:** You may select a different address from the drop down menu if one is available. Click **Create Address** to add or edit an address in **My Profile**. Click **Managing Addresses in My Profile** for more information.
7. Review the contents of your order.

8. Agree to the **Terms & Conditions** by checking the box.

9. Click **Place Order** to complete your transaction.

**TIP:** To make changes to your order, click **back**.

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**Important:** Do not click the back button or navigate away from the page after you have placed your order.

When your order has processed, the acknowledgement page will appear.

A separate order confirmation will be emailed to the shipping contact once the order has been confirmed.
Place an Order on Behalf of a Laboratory/Organization

1. When you’ve added all of your desired items, click Shopping Cart.

**Important:** Review the drop down menu labeled I’m making purchases for to ensure you are making the purchase on behalf of the correct organization or party.

2. Review the items in your shopping cart.

**TIP:** If you are not ready to complete your order, click the Actions drop down menu for additional options (explained in table below).

**TIP:** You may adjust the quantity of any of your items. You must click the trash can to remove an item from your shopping cart.

**Important:** If you are not ready to complete your order, you may select one of the following options from the Actions drop down menu:

<table>
<thead>
<tr>
<th>Label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save Cart</td>
<td>If you are not ready to make a purchase but would like your items to be available at a later date, select Save Cart and click GO.</td>
</tr>
<tr>
<td>Add to Wish List</td>
<td>If you want to save your items in a wish list for future use, click Add to Wish List and click GO.</td>
</tr>
<tr>
<td>Print Quote</td>
<td>If you need to print a quote, select Print Quote and Click GO.</td>
</tr>
<tr>
<td>Delete Cart</td>
<td>If you have decided not to make a purchase and want to empty your cart, select Delete Cart and click GO.</td>
</tr>
</tbody>
</table>
3. Click **Checkout** to begin your transaction.

![Checkout](image1.png)

4. Review **Ship To** and **Shipping Details**.

5. Click **Next**.

![Shipping](image2.png)

**TIP:** Shipping Method updates affect publication purchases only. This option is only visible if you have added publications to your cart.

**TIP:** You may update **Ship to Contact** by clicking **Update**.

**TIP:** You may update **Ship to Address** by clicking **Update**.
6. Review Bill To and make any required edits.

   ![Image of Bill To field]

   **TIP:** You may update Bill to Customer by clicking Update.

   **TIP:** To update your Bill to Contact or Bill to Address, contact the Customer Contact Center for assistance.

7. Use the Payment radio buttons to select your payment type.

8. After you have added your payment information, click Next.

   ![Image of Payment selection]

   **TIP:** Selecting different payment options will change the fields required. See table on next page for details.
### Payment Type

<table>
<thead>
<tr>
<th>Payment Type</th>
<th>Description</th>
<th>Image</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Credit Card</strong></td>
<td>Select a previously used credit card or click the drop down menu to add a new credit card.</td>
<td><img src="image1.png" alt="Credit Card Image" /></td>
</tr>
<tr>
<td><strong>Wire Transfer</strong></td>
<td>Enter <strong>Bank Name</strong>, <strong>Bank Routing Number</strong>, <strong>Bank Account Number</strong>, and <strong>Date of Transaction</strong>. You must also <strong>Add Wire Transfer Attachment</strong>.</td>
<td><img src="image2.png" alt="Wire Transfer Image" /></td>
</tr>
<tr>
<td><strong>Purchase Order</strong></td>
<td>Enter <strong>PO Number</strong> and <strong>Purchase Order Amount</strong>; and agree to the terms. You may also <strong>Add Attachment</strong>.</td>
<td><img src="image3.png" alt="Purchase Order Image" /></td>
</tr>
</tbody>
</table>
9. Review the contents of your order.

10. Agree to the Terms & Conditions by checking the box.

11. Click Place Order to complete your transaction.

**Important:** Do not click the back button or navigate away from the page.

When your order has processed, the acknowledgement message will appear.

A separate order confirmation will be emailed to the shipping contact once the order has been confirmed.
Place an Order using your Renewal Quote

Based on your order history, your 2017 quote is ready for processing. Follow these steps to view and place the order:

1. Log in to cap.org.

2. Click Shop.

   **Important:** Review the drop down menu labeled *I'm making purchases for* to ensure you are making the purchase on behalf of the correct organization.

3. Click Quotes from within the Welcome Bin.

4. Use the radio button to select the quote.

5. Use the Actions drop down menu to Update Quote and click Go or click Checkout to begin your transaction.

   a. When choosing Update Quote, the prepopulated quote is moved into the Shopping Cart. Items are now editable and the Continue Shopping button can be used to add additional items to the cart.

   b. When you’ve added all desired items, click Shopping Cart.

      i. Click Checkout to begin your transaction.

6. Click here to continue with the checkout process.
View an Order

1. Click **Order History**.

2. Use the options to filter your results.

3. Click **GO**.

<table>
<thead>
<tr>
<th>Filter</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Orders</td>
<td>Use View Orders drop down menu to select orders Sold to your Account or Billed to your account.</td>
</tr>
<tr>
<td>Orders created in the last</td>
<td>Use Orders created in the last drop down menu to select the timeframe for your search: 14 days, 1 Month, 2 Months, 3 Months, 6 Months, 1 Year, 1.5 Years</td>
</tr>
<tr>
<td>Orders Between</td>
<td>Use the calendar function to search for orders between two dates.</td>
</tr>
<tr>
<td>Search By</td>
<td>Use the Search by drop down menu to filter by: Order Number, Quote Number, Order Date, Order Status, PO Number, Last 4 digits of Credit Card Number, Ship to Customer or Bill to Customer. You may also add an additional search qualifier and add text.</td>
</tr>
</tbody>
</table>
Your filtered results will appear below the search criteria you’ve selected.

TIP: See table below for results column definitions.

<table>
<thead>
<tr>
<th>Results Column</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Number</td>
<td>Order number associated with your order provided by the CAP.</td>
</tr>
<tr>
<td>Quote Number</td>
<td>If your order was generated by a quote, you may search by quote number.</td>
</tr>
<tr>
<td>Order Date</td>
<td>Date the order was submitted.</td>
</tr>
<tr>
<td>Order Status</td>
<td>One of the following may be associated with your order:</td>
</tr>
<tr>
<td></td>
<td>• In Progress: Order is active within the CAP system.</td>
</tr>
<tr>
<td></td>
<td>• Complete: Order has been processed.</td>
</tr>
<tr>
<td></td>
<td>• Cancelled: Order has been terminated.</td>
</tr>
<tr>
<td>PO Number</td>
<td>If the purchase you are searching for was ordered with a PO as form of payment, you may search by your PO number.</td>
</tr>
<tr>
<td>Order on Hold</td>
<td>For additional detail about orders, including orders on hold, <a href="mailto:email">email</a> or call the Customer Contact Center at 800-323-4040 option 1.</td>
</tr>
<tr>
<td>Invoice Number</td>
<td>Invoices are typically created within 24 hours of order creation.</td>
</tr>
<tr>
<td>Order Total</td>
<td>Amount billed as it reads on the invoice.</td>
</tr>
<tr>
<td>Action</td>
<td>Action allows you to begin the process of cancelling an item or an order if appropriate.</td>
</tr>
</tbody>
</table>
Online Store Terms & Conditions and Ordering Information

**Terms & Conditions**
Click [here](#) to access Terms and Conditions.

**Ordering Information**
To ensure accurate and timely order placement:

- **Shop online:**
  - Visit cap.org and go to the Shop tab. Log in and go to “I’m making purchases for” to select your laboratory.
  - Review, modify, and submit the prepopulated quote found under the “Quotes” link.
  - Note: To begin ordering on behalf of your organization, you will need to have ordering privileges granted by your Site Administrator.

- **Use the preprinted order forms:**
  - Return ALL pages of your renewal order form, including payment information.
  - Print legibly and follow all instructions for adding and canceling programs. We process order forms using optical character recognition, so legible printing will help ensure the accuracy of your order.

**Order Deadline**

- Order by December 1st to ensure full participation.
- Order early. Some programs have limited quantities.
- Orders received after December 1st will be processed by date of receipt and prorated per program availability.

**Renewal Orders** (for current customers)

- Programs ordered as of August 1st are preprinted on your order renewal form.
- Review all notes.
- Refer to the Surveys catalog for program changes and discontinued or new programs.
- Complete form with payment information and return all pages by email to cdm@cap.org or fax all pages to Customer Data Management at 847-832-8168 (Country Code: 001).
- An order acknowledgment will be emailed upon receipt of your order.
- Once processed, an order confirmation will be emailed to the shipping contact. Order changes can be made at that time.
- You can also see a list of programs in your PT Shipping Calendar at cap.org.

**Order Additions and Cancellations**

- We will make every effort to accommodate orders received after December 1st, dependent on the shipping schedule and specimen availability and stability.
- Due to vendor commitments, the CAP must receive cancellations no later than six weeks prior to the published ship date to receive credit for canceled programs.
**CAP and CLIA Numbers**
- Please have your CAP number available when placing orders. If you are a new CAP customer, a CAP number will be assigned and will appear on your order confirmation.
- US and international customers subject to CLIA: Confirm or provide the laboratory’s CLIA identification number, which is assigned by the Centers for Medicare & Medicaid Services (CMS) and can be obtained from your laboratory director. Contact your CMS Regional Office if you do not have a CLIA ID number.
- Orders may be submitted pending assignment of your CLIA number. Forward the number to the CAP once assigned.

**CMS Reporting**
- The College of American Pathologists must submit PT results to the CMS for all laboratories providing a CLIA identification number.
- Your reporting preferences are outlined on the **CMS Analyte Reporting Selections** document, which is available online in e-LAB Solutions Suite.
- If a laboratory does not notify the CAP in advance that they have discontinued testing of a regulated analyte, a score of zero will be given.
- To avoid any penalties and ensure appropriate reporting in the future, you must note analytes listed on this report for which you do not perform testing.

**Customer Support**
**Customer Contact Center Hours:** Monday–Friday, 7:00 AM–5:30 PM CT
**Extended Support Hours:** Monday–Friday, 9:00 PM–5:00 AM CT (email correspondence only)

<table>
<thead>
<tr>
<th>Call us to:</th>
<th>800-323-4040 option 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place or modify an order</td>
<td>847-832-7000 option 1</td>
</tr>
<tr>
<td>Update contact information (telephone number, email address, fax number, or address)</td>
<td>Country Code: 001</td>
</tr>
<tr>
<td>Discuss special needs (International)</td>
<td></td>
</tr>
<tr>
<td>Initiate CAPTRAKer email</td>
<td></td>
</tr>
</tbody>
</table>

**To contact the CAP via email**
Go to cap.org and select **CONTACT & SUPPORT** at the top of the home page.

**OR**
Send email to contactcenter@cap.org.

**To submit orders or permits**
Fax: 847-832-8168 (Country Code: 001)
Email: cdm@cap.org

**Laboratory Accident Hotline**
800-443-3244
847-470-2812 (For international customers)
Country Code: 001

**CAPTRAKer Email**
The CAP’s electronic PT kit shipment-tracking service offers these benefits to your lab:
- Locate your PT kit in an instant.
- Receive CAPTRAKer emails notifying you of program shipments.
- Link to carrier tracking information through a CAPTRAKer email.

To initiate the receipt of CAPTRAKer emails, please forward your name, account number, and email address to contactcenter@cap.org.