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. Select the **Frequency** and **Amount** for the contribution in the corresponding **List of Values**.
   a. Voluntary Contributions do not have a **Frequency** selection.

5. Click **Add to Cart**.

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**PathPAC Contribution**

- **Frequency**: One-time
- **Amount**: Select Amount
- **ADD TO CART**

**CAP Member Giving Levels**
- Chairman’s Circle ($5,000)
- President’s Club ($2,000 - $4,999)
- Vice President’s Club ($1,000 - $1,999)
- Senator’s Club ($500 - $999)
- Representative’s Club ($250 - $499)
- Supporter ($1-$249)

**Resident Giving Levels**
- Future Chair ($500+)
- Future Leader ($300-$499)
- Future Sustainer ($100-$299)
- Future Cotributor ($50-$99)

**Disclaimer**: Only CAP members may contribute to PathPAC. Personal contributions made to PathPAC are voluntary and do not affect your CAP membership. PathPAC contributions are not deductible for tax purposes. Federal law requires PathPAC to make its best effort to report the name, address, occupation, and employer for each contributor whose aggregate contributions are in excess of $200 per calendar year. Only U.S. citizens or those holding a green card may contribute to a PAC. Individuals may contribute up to $5,000 per calendar year to PathPAC.

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**PathPAC PEF Contribution**

- **Frequency**: One-time
- **Amount**: Select Amount
- **ADD TO CART**

**Disclaimer**: PathPAC accepts corporate contributions for the Political Education Fund (PEF), a non-federal account supporting CAP political and legislative programs.

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**CAP Foundation**

- **Frequency**: One-time
- **Amount**: Select Amount
- **ADD TO CART**

**President’s Circle Diamond ($5,000+)
- President’s Circle Platinum ($2,500 - $4,999)
- President’s Circle Gold ($1,000 - $2,499)
- Silver Supporter ($500 - $999)
- Bronze Supporter ($100 - $499)
- Friend of the Foundation ($1-$99)

**Disclaimer**: Contributions to the CAP Foundation are tax deductible to the extent permitted by law as charitable tax deductions.

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**Voluntary Contributions**

- **Amount**: Select Amount
- **ADD TO CART**

**Contributing ($250 or more)
- Sustaining ($100 - $249)
- Supporting ($1 - $99)
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).

**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>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>
<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>
</tbody>
</table>
4. Review Shipping Information and update as needed.

5. Click Next.


7. Use the Credit Card drop down menu to select the credit card you would like to use for payment or select Add A New Card to enter new information.

8. Click Next.
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 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>
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<th>Description</th>
</tr>
</thead>
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<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>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>
<tr>
<td>Print Quote</td>
<td>If you need to print a quote, select <strong>Print Quote</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>
</tbody>
</table>
3. Click **Checkout** to begin your transaction.

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

5. Click **Next**.

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

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

8. After you have added your payment information, click Next.
<table>
<thead>
<tr>
<th>Payment Type</th>
<th>Description</th>
<th>Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Card</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>Wire Transfer</td>
<td>Enter <strong>Bank Name, Bank Routing Number, Bank Account Number, and 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>Purchase Order</td>
<td>Enter <strong>PO Number and 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.

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

**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 renewal quote is ready for processing. Follow these steps to view and place the order:

1. Log in to [cap.org](http://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 Renew Your Order Now from within the Welcome Bin.
4. Ensure the radio button is selected for the renewal quote.
5. Use the Actions drop down menu to Update Quote and click Go or click Checkout to begin your transaction.

6. Click [here](http://cap.org) to continue with the checkout process.

   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](http://cap.org) to continue with the checkout process.
Opt-out of Paper Renewal Packet

CAP offers the opportunity to opt-out of receiving a paper order renewal packet and receive materials electronically.

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 the Opt-out of receiving paper renewal packet link from within the Welcome Bin.
4. Select the Checkbox to confirm enrollment in Paperless Order Renewal.

5. Click Enroll.

**Important:** Upon clicking Enroll, the laboratory will be enrolled in a Paperless Order Renewal for future renewals.

**TIP:** To continue receiving a paper renewal packet, click No Thanks or close the window using the X. The link will remain available to enroll in the future.

**TIP:** Upon enrollment, the link will no longer be available within the online store. To return to receiving paper renewal materials, please contact the Customer Contact Center.
Print Pro-Forma Invoice

Once you’ve clicked Update Quote to move your Order Renewal quote into your Shopping Cart, you have the option to access a PDF Pro-Forma Invoice for your quote.

1. In the Shopping Cart, use the Actions dropdown menu to select Print Quote.
2. Click Go.

**Note:** The Actions dropdown menu and Print Quote option are available throughout all pages of the checkout process.

Depending on the browser you are using and your browser settings, the PDF may open up in another window (i.e. Chrome) or you may receive a pop-up asking how you would like to access the PDF (i.e. Firefox and Internet Explorer).

**Firefox:**
3. Select Open with.
4. Click OK to view the Pro-Forma Invoice.
Internet Explorer:
3. Select Open to view the Pro-Forma Invoice.

Chrome:
3. Click the PDF Icon on the screen to view the Pro-Forma Invoice.

The pro-forma invoice will open for review.
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>
</tbody>
</table>
| Order Status   | One of the following may be associated with your order:  
  • **In Progress:** Order is active within the CAP system.  
  • **Complete:** Order has been processed.  
  • **Cancelled:** Order has been terminated. |
| PO Number      | If the purchase you are searching for was ordered with a PO as form of payment, you may search by your PO number. |
| Order on Hold  | For additional detail about orders, including orders on hold, email or call the Customer Contact Center at 800-323-4040 option 1. |
| Invoice Number | Invoices are typically created within 24 hours of order creation. |
| Order Total    | Amount billed as it reads on the invoice. |
| Action         | Action allows you to begin the process of cancelling an item or an order if appropriate. |
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 1 847-832-7000 option 1 (For international customers) Country Code: 001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place or modify an order</td>
<td></td>
</tr>
<tr>
<td>Update contact information</td>
<td></td>
</tr>
<tr>
<td>(telephone number, email address, fax number, or address)</td>
<td></td>
</tr>
<tr>
<td>Discuss special needs (International)</td>
<td></td>
</tr>
<tr>
<td>Initiate CAPTRAKer email</td>
<td></td>
</tr>
<tr>
<td>To contact the CAP via email</td>
<td>Go to cap.org and select CONTACT &amp; SUPPORT at the top of the home page. OR Send email to <a href="mailto:contactcenter@cap.org">contactcenter@cap.org</a>.</td>
</tr>
<tr>
<td>To submit orders or permits</td>
<td>Fax: 847-832-8168 (Country Code: 001) Email: <a href="mailto:cdm@cap.org">cdm@cap.org</a></td>
</tr>
<tr>
<td>Laboratory Accident Hotline</td>
<td>800-443-3244 847-470-2812 (For international customers) Country Code: 001</td>
</tr>
</tbody>
</table>

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.